

# Infusionsoft Demo

# Housekeeping

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- A/V Check

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- You're all on mute

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- Introduction, Concepts, Demo - Retail & Sales Reps



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- We've been doing this longer than any other company - and we have more successful customers than:
  - Hubspot, Marketo, Eloqua, etc.
- Infusionsoft has been on the Inc 500/5000 list since 2007

# What is Infusionsoft?



# What is Infusionsoft?



- Contact management



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- Contact management
- Tasks, calendar, workflow automation

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- Tasks, calendar, workflow automation
- Sales opportunity management

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- Tasks, calendar, workflow automation
- Sales opportunity management
- Ridiculous ability to segment

# What is Infusionsoft?



# What is Infusionsoft?

- Marketing automation



# What is Infusionsoft?

- Marketing automation
- Email autoresponders



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- Marketing automation
- Email autoresponders
- Multi-media



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- Multi-media
- Lead capture & intelligent nurturing





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- Multi-media
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- Drag & drop email & web form builder
- One-click campaign builder

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- Order forms, shopping cart



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- Intelligent upsells & cross-sells



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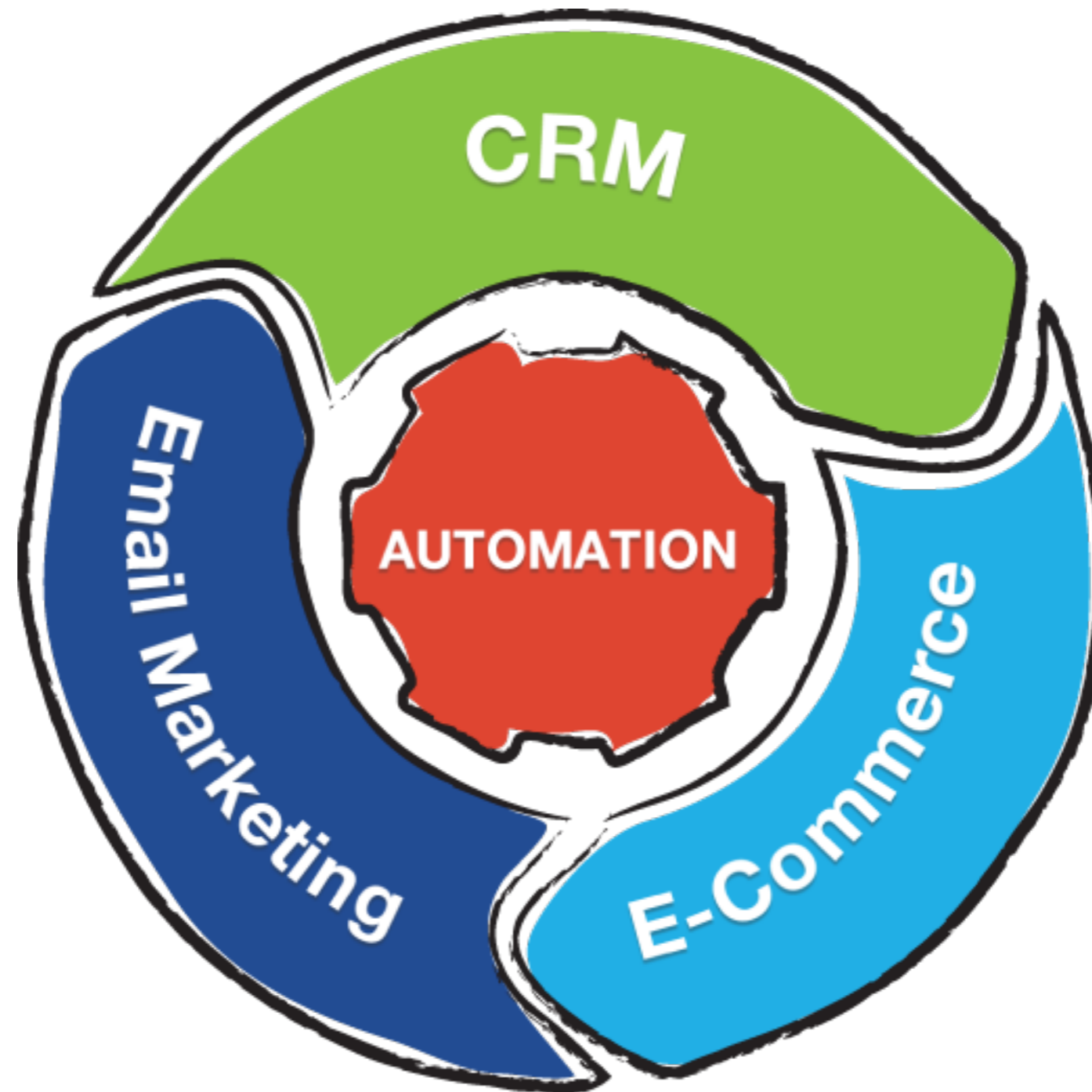
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- Intelligent upsells & cross-sells
- Affiliate management



# What is Infusionsoft?



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# What is Infusionsoft?

# Also included:

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- Powerful reporting

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  - Email marketing

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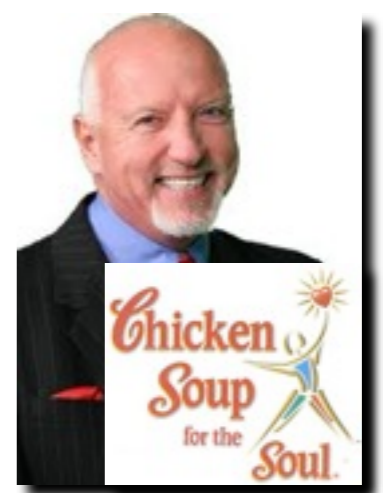
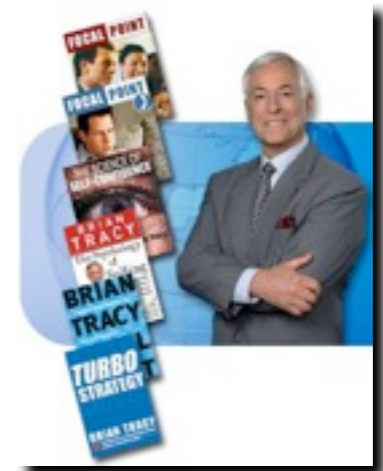
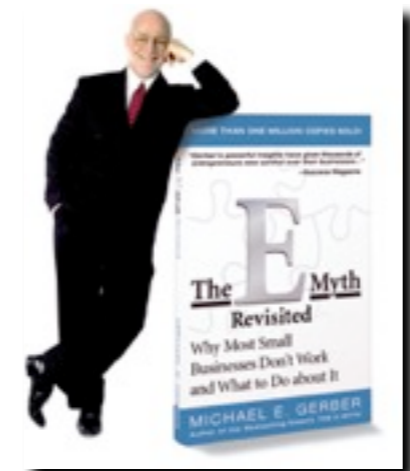
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  - Marketing ROI
- Outlook Plug-in
- API



# Who uses Infusionsoft?



# Over 7,000 happy customers...

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**Patrick Allmond**

Had an affiliate sale last night via one of my products in Infusionsoft. Very cool how the customers, the CRM, the products, the shopping cart, the checkout, and the affiliate management is all within ONE system.

Wednesday at 6:05am

# Over 7,000 happy customers...



**@JimCavale**

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**@Infusionsoft** was KEY this week, in providing the ability to track leads and make the most educated decision on follow ups. **#easysoft**



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June 29 at 1:01pm · Like · Comment



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**vickiscannon** Vicki S. Cannon

Does anyone have an opinion on **#Infusionsoft vs #1ShoppingCart** ?

20 Jul

In reply to **@vickiscannon** ↑



**@Mike\_Fountain**

Mike Fountain

**@vickiscannon** I have been an **@Infusionsoft** user for nearly 3 years, it's like comparing diamonds and coal. **#Infusionsoft** is the way to go.



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**Timothy Francis** ▶ **Infusionsoft**

Everytime I log into my Infusionsoft account, it's like I'm stepping into a Ferrari and I get a little jolt of joy... Infusionsoft!!!

Friday at 9:19am · Like · Comment

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- Info Marketers & Internet Marketers

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- How can I prevent leads & customers from slipping through the cracks?



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- **Hole #1: Lost Traffic**

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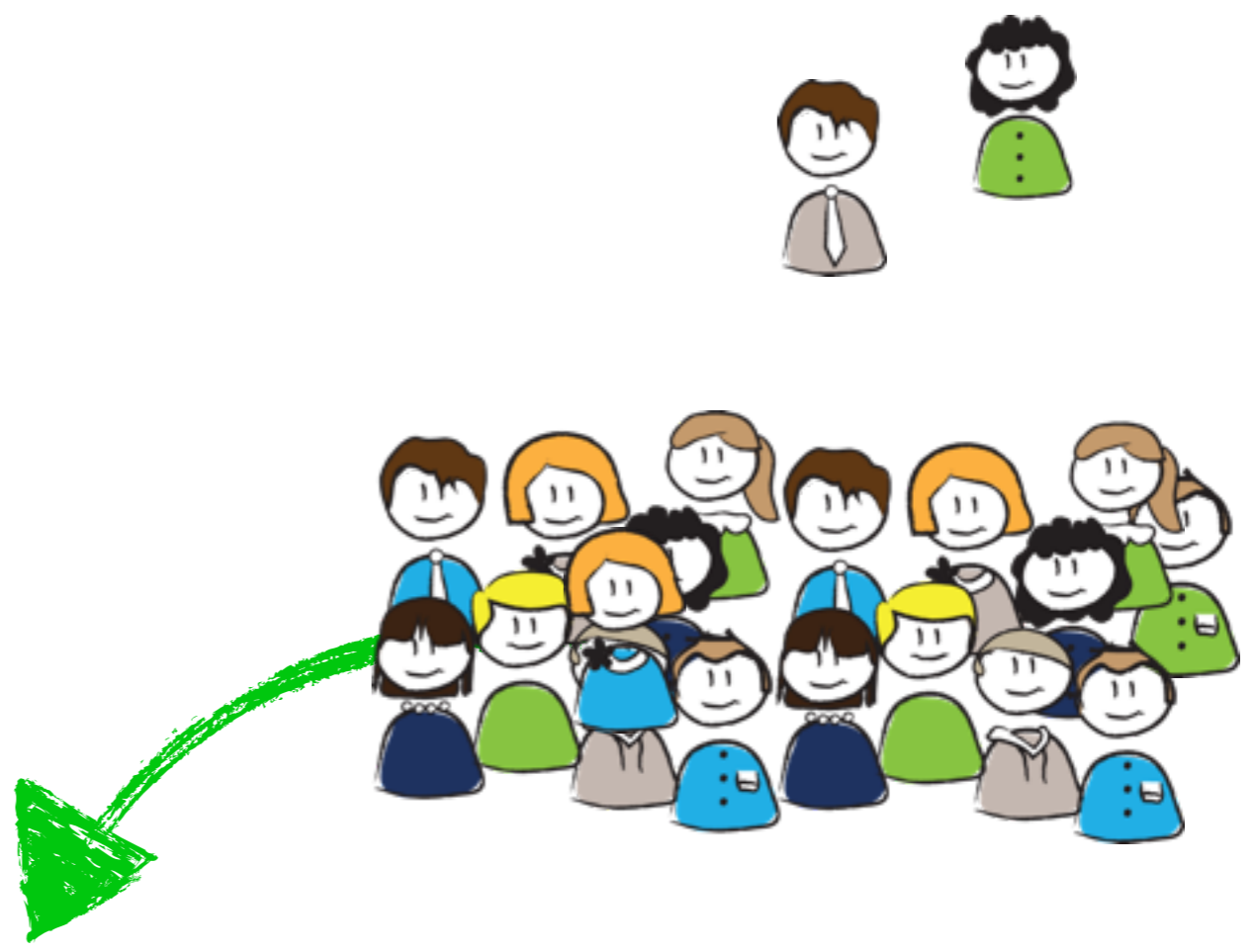




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- Hole #2: Lost Leads



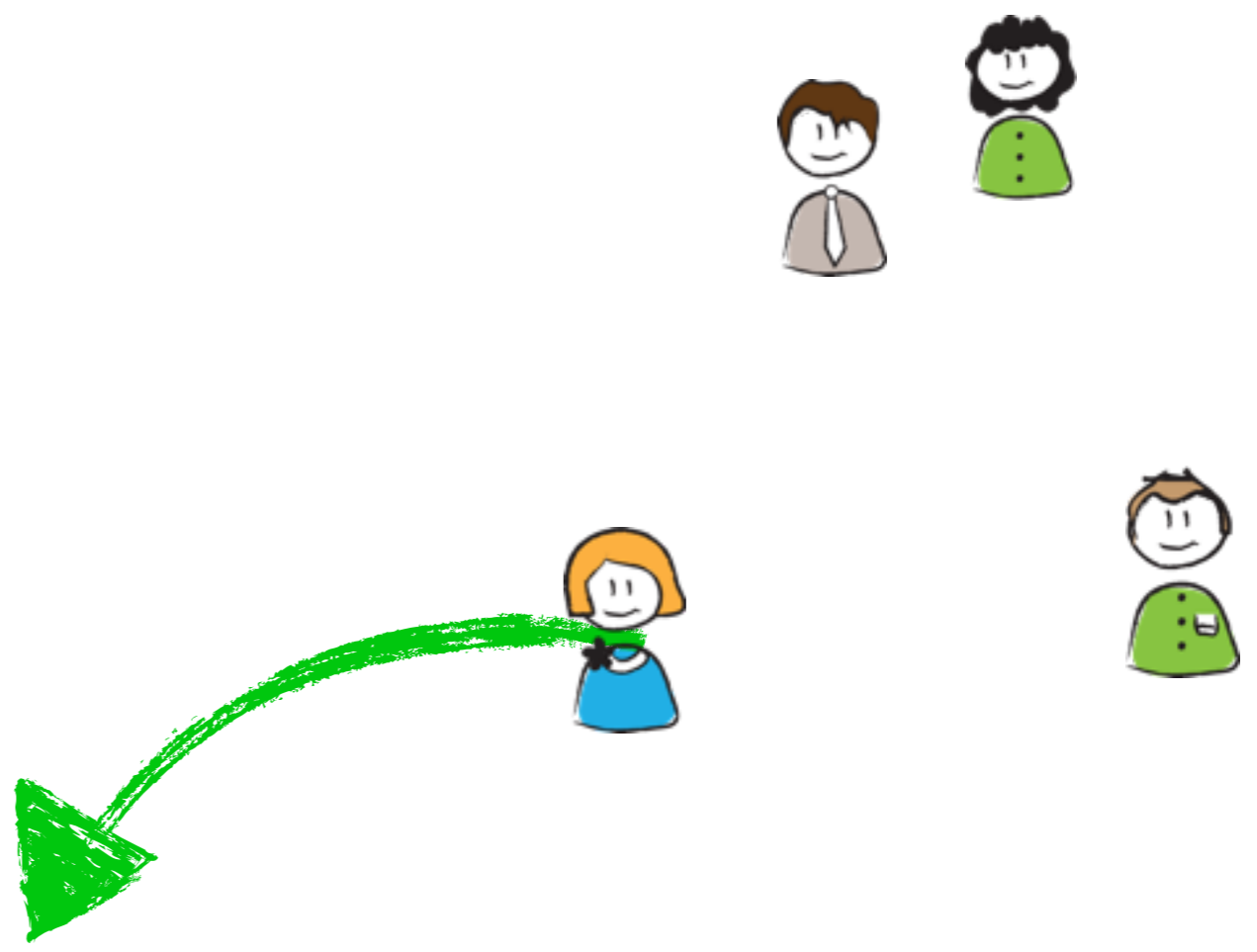
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- Hole #3: Lost Customers



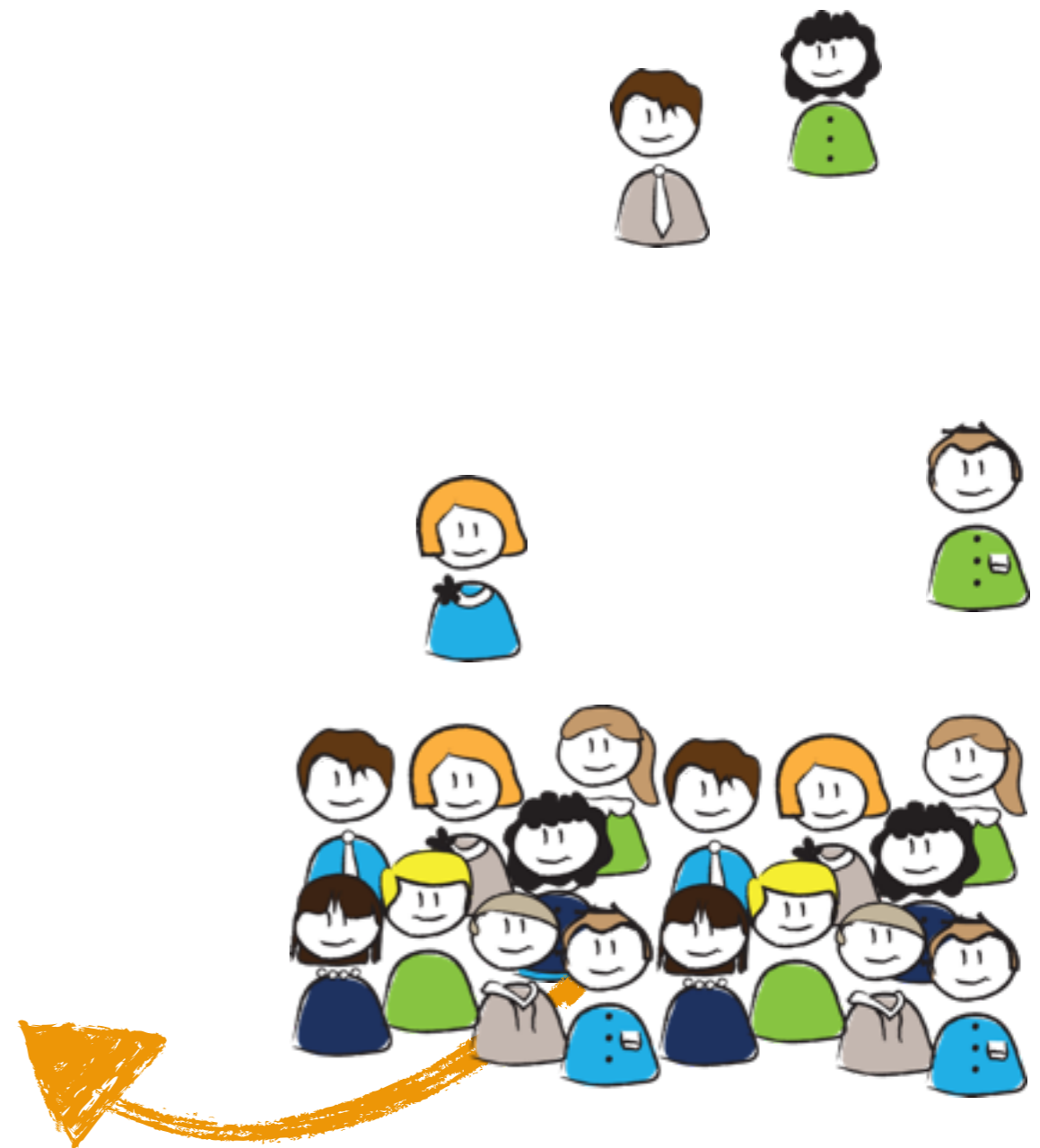
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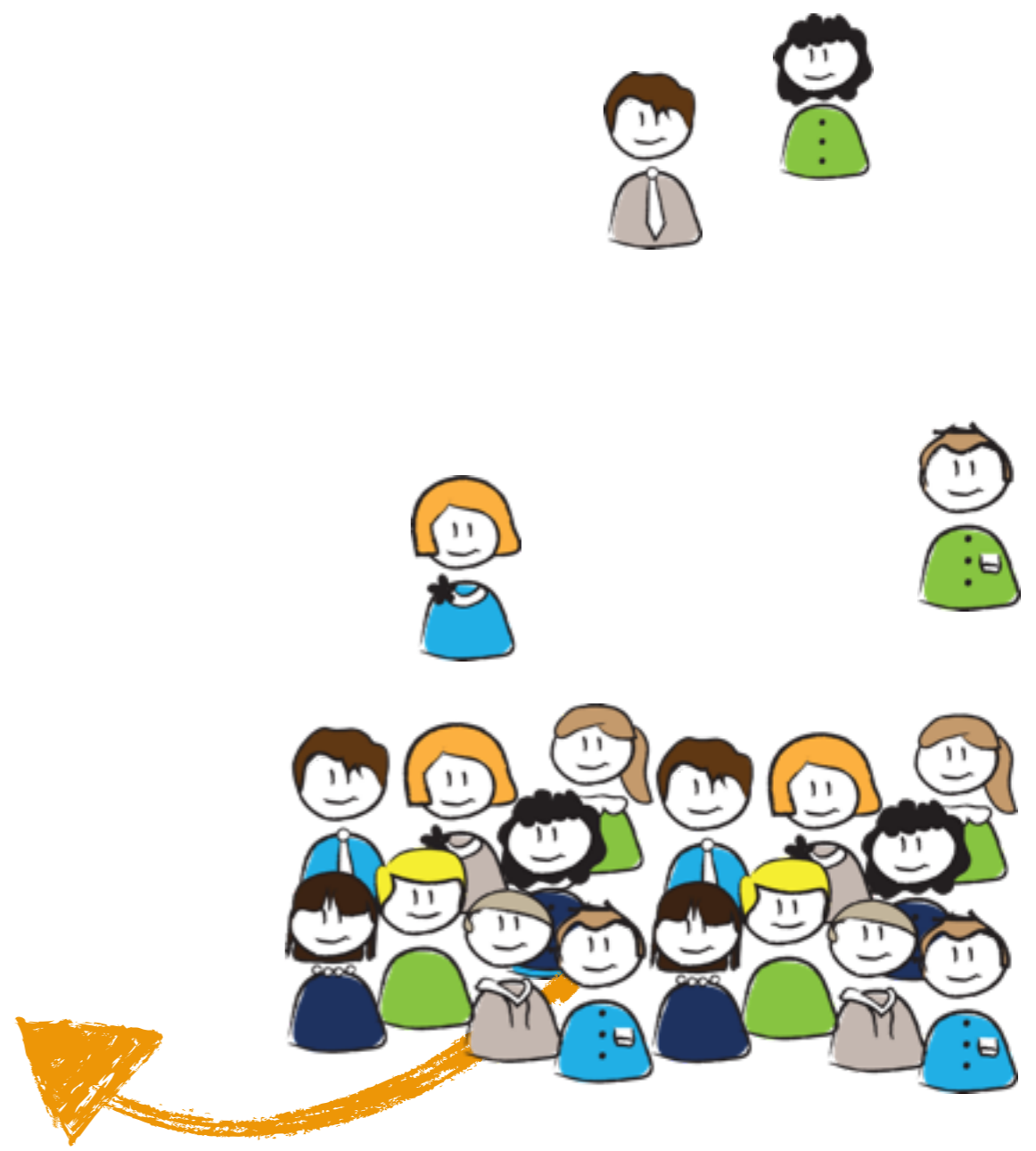
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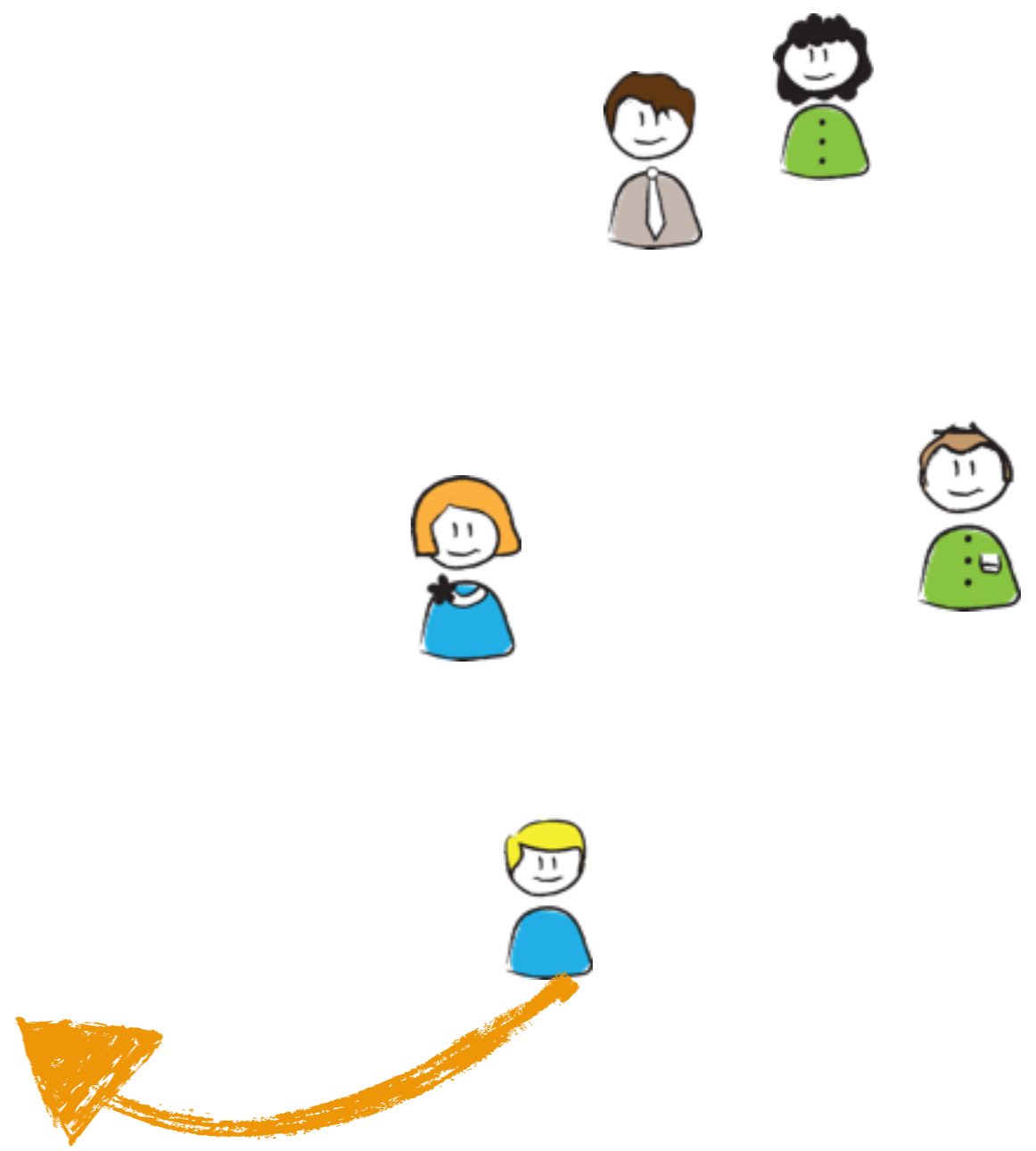


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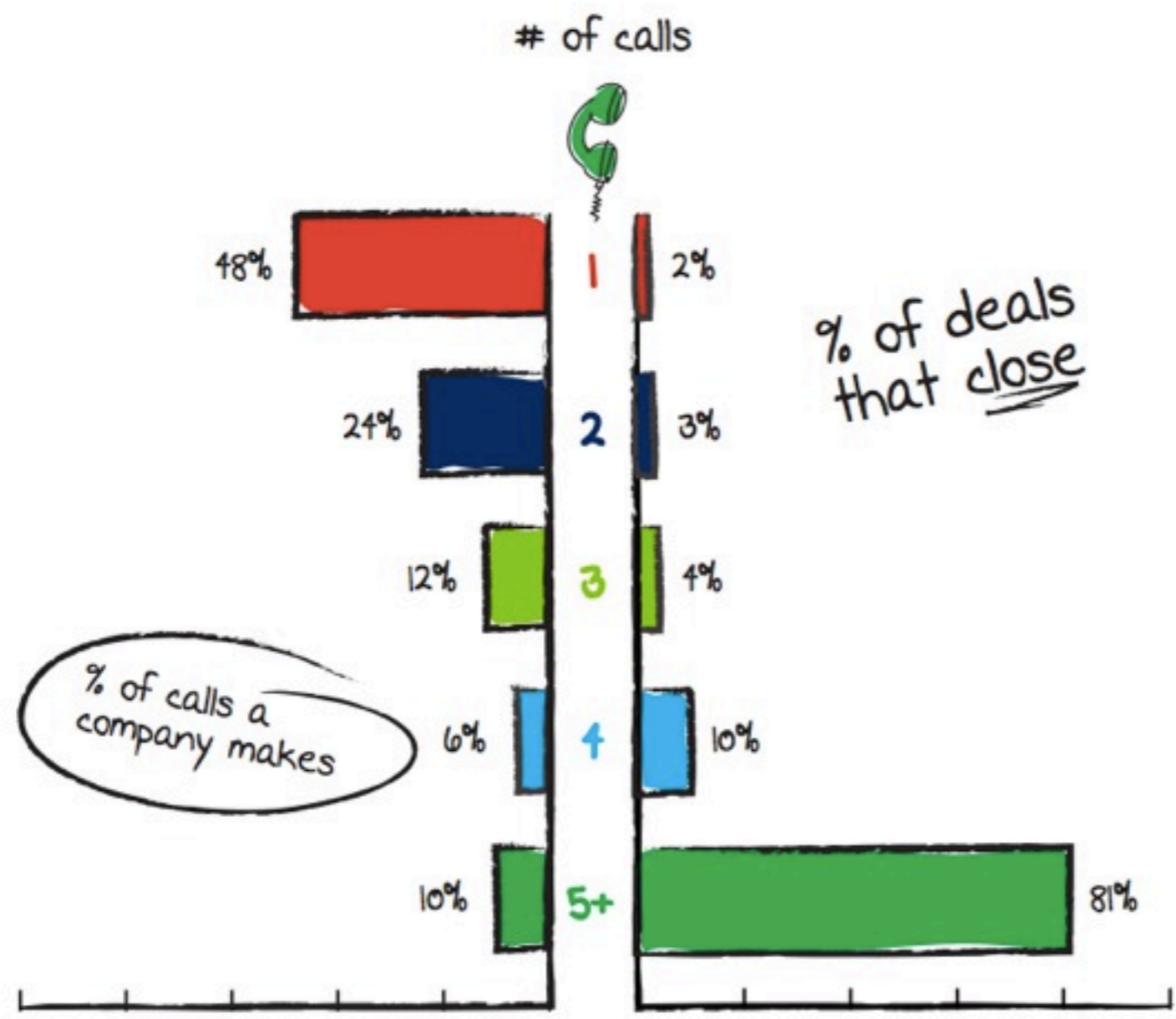


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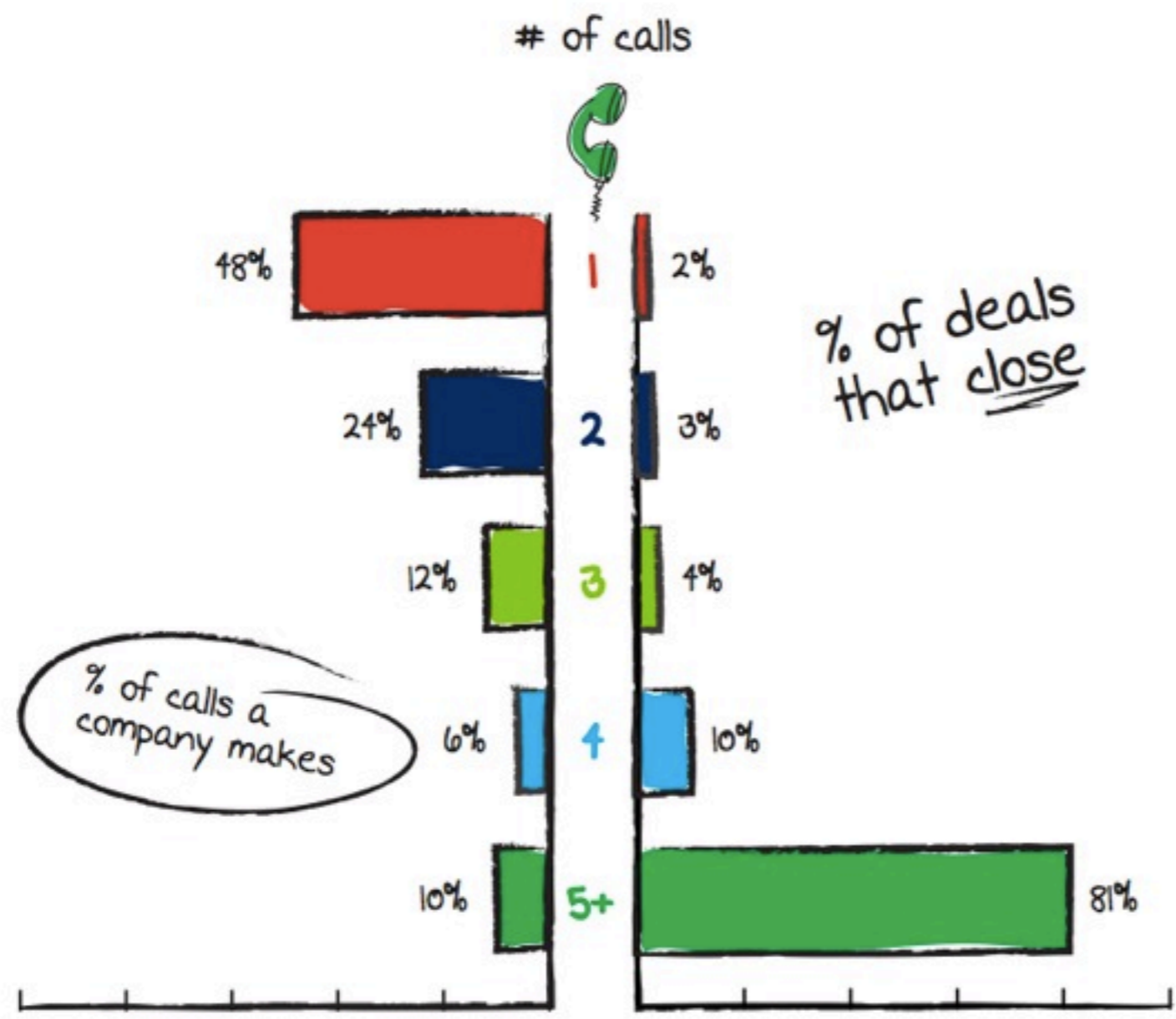


# Did You Know?



It takes an average of five sales calls to close a deal, but most salespeople give up after just one or two calls.

# Did You Know?



How many leads each month are labeled as “bad” and forgotten forever?

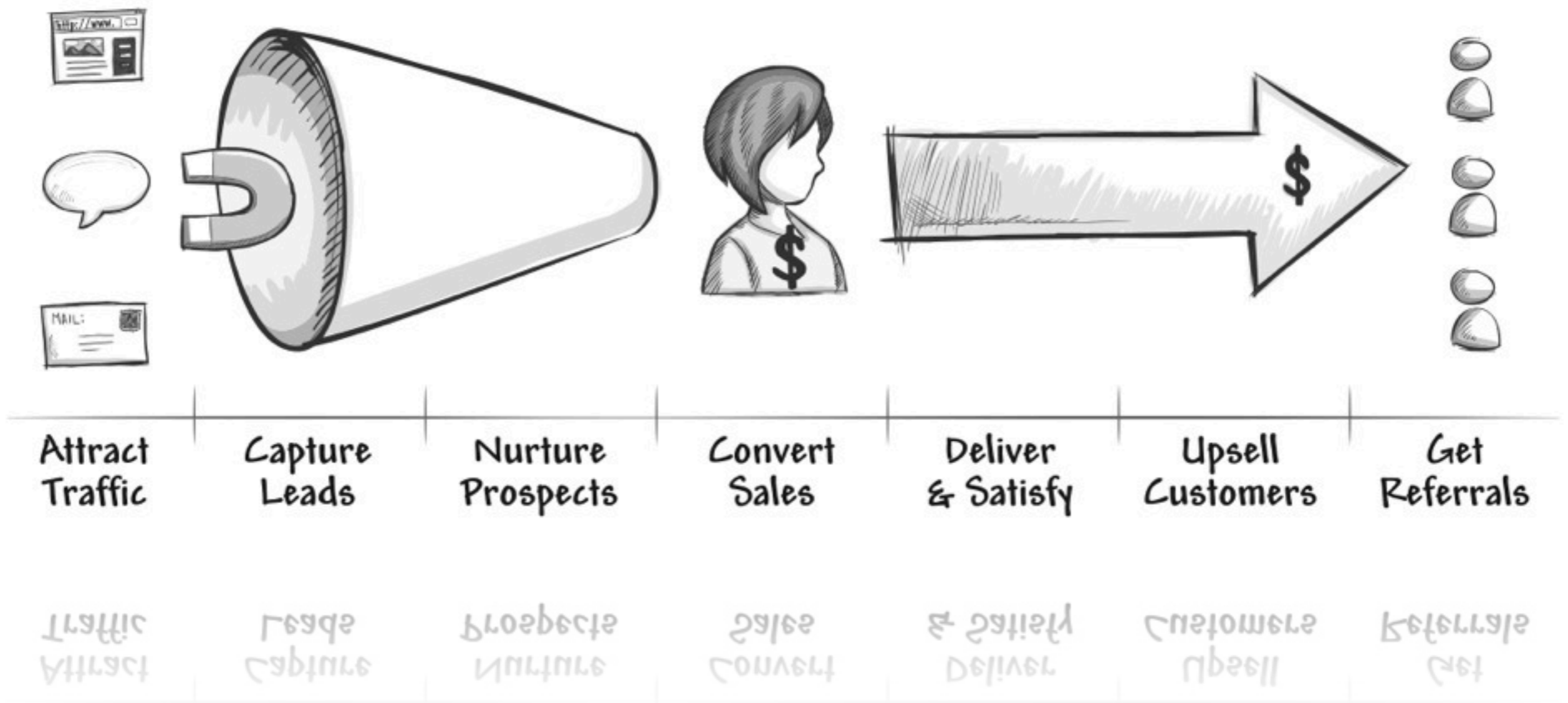
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# Poll: How much more monthly revenue?

- \$1,000
- \$5,000
- \$10,000
- \$25,000 or more

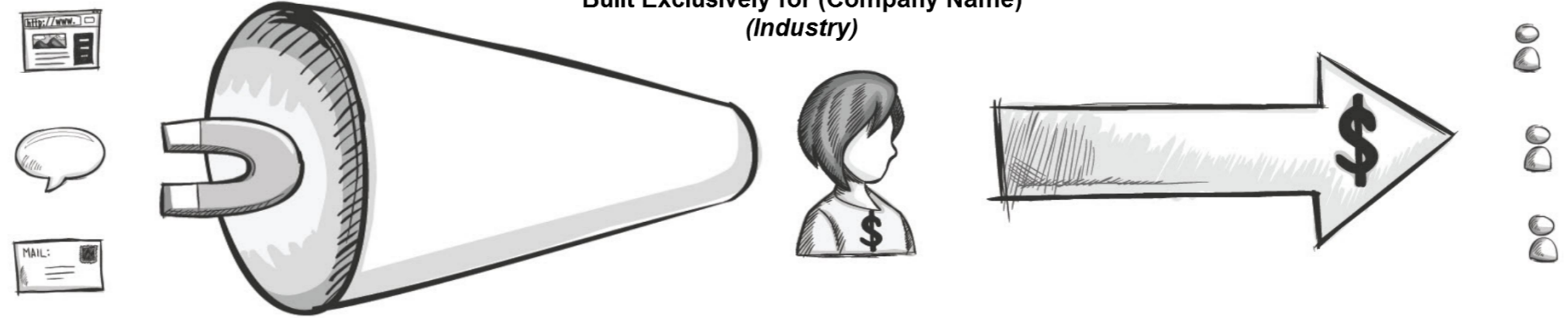
# Framework for Strategy: The Perfect Customer Lifecycle

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# The Perfect Customer Lifecycle™

Built Exclusively for (Company Name)  
(Industry)



	Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates
Current State	Sources: ? Traffic: ?/mo	Magnet: ? Webform: ? Opt-Ins: ?/mo Conv Rt: ?	Hand Raise: ?	Selling Model: ?	Cart: ? Upsell: ? Credit Card: ? Pmt Plans: ?	Acct Mgr: ? Ship Prod: ? Follow Up: ?	Prod Name: ? Timing: ?	Testimonial: ? Referral: ?
Goals & Opportunities	(Visitors)	(Opt-Ins)	(Qualified Leads)	(Agreement To Buy)	(The Cash)	(Satisfied Customer)	(Repeat Customer)	(Testimonials & Referrals)
Marketing Automation Plan (M.A.P.)	PPC & SEO Direct Mail Social Media Networking Events	Website Lead tag: source  Facebook Lead tag: Facebook  Internal Webform tag: event source	New Lead Follow Up  Interested No Response Networking Events	Hot Prospect Sequence  Interested No Response Long-Term Nurture	Request a Call Assign to Rep (opportunity management)	Shopping Cart	New Customer Follow Up  Satisfied? Not Satisfied Customer Service Campaign	Request testimonials and referrals  Upsell - request a quote seq.



# Service Business



# Service Business

- Attract Traffic



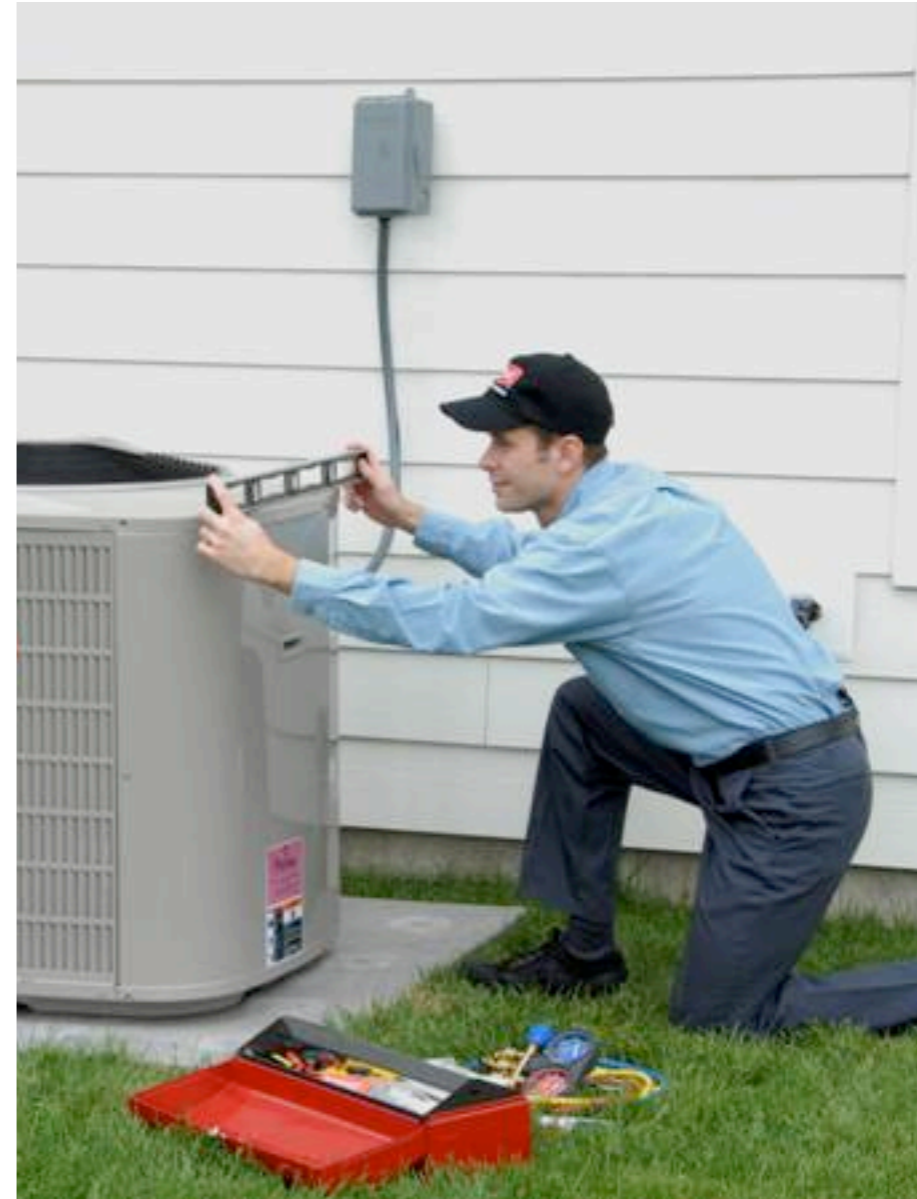
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- Attract Traffic
- Capture Leads



# Service Business

- Attract Traffic
- Capture Leads
- Nurture



# Service Business

- Attract Traffic
- Capture Leads
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- Convert Sales



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- Deliver & Satisfy



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# Service Business

- Attract Traffic
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- Nurture
- Convert Sales
- Deliver & Satisfy
- Upsell
- Referrals

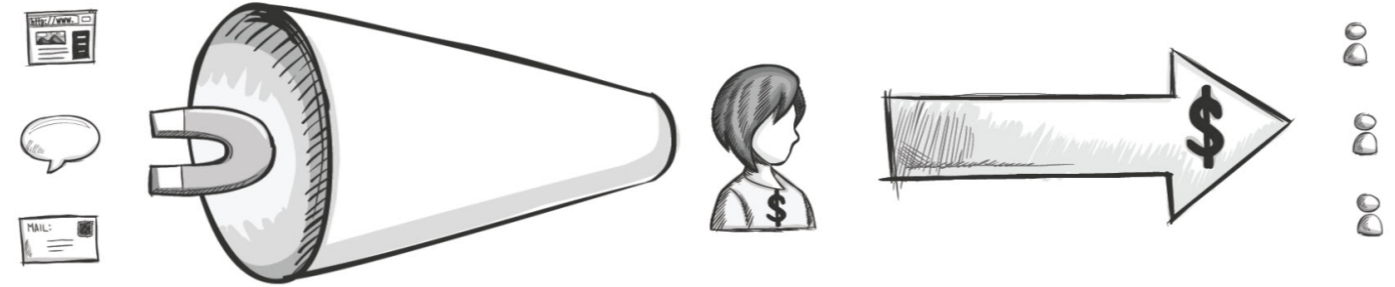




# Heating & Air Conditioning

## The Perfect Customer Lifecycle™

Built Exclusively for ...



Goals & Opportunities

**Generate Interest**      **Capture Leads**      **Educate/Build Trust**      **Convert**      **Process The Sale**      **Fulfill & Wow**      **Upsell**      **Create Advocates**

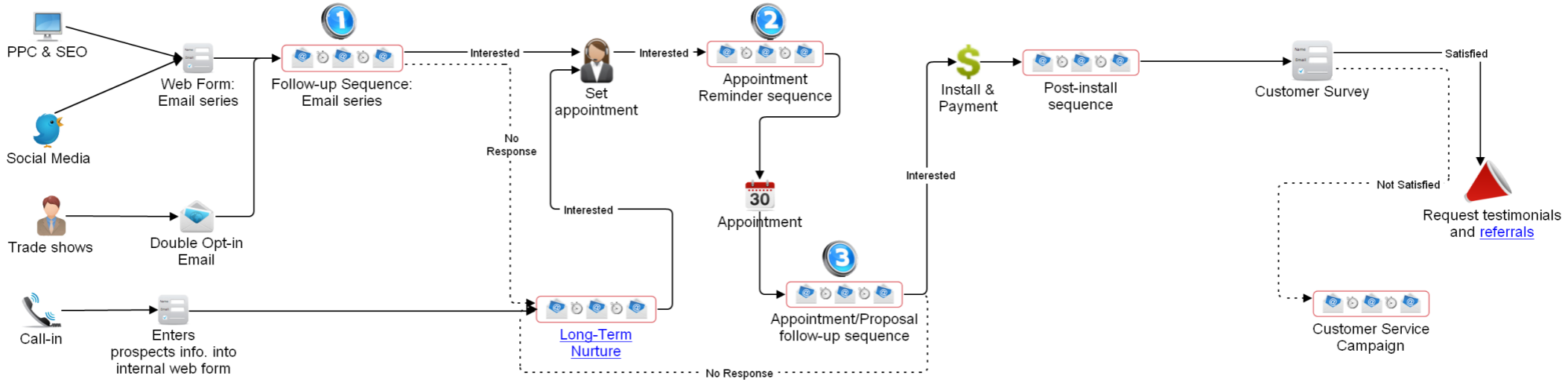
Web Forms...capture leads

Magnet or email series...offer education, build relationship  
Single CRM to capture all contacts

Develop follow-ups that answer FAQ's when prospect shows interest.

Automate new customer welcome and get feedback

Marketing Automation Plan (M.A.P.)



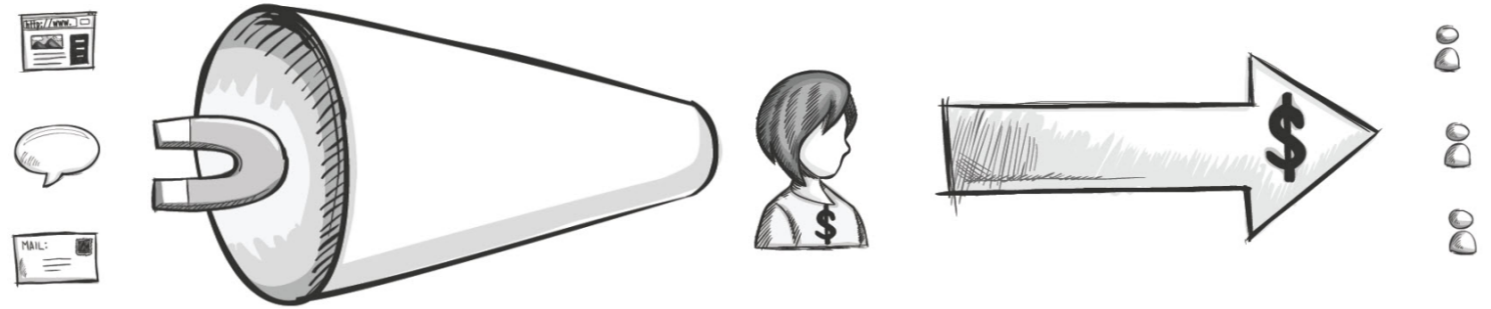
**Additional Support Resources:**  
[Infusionsoft Fundamentals Webinars](#)  
[Infusionsoft Online Support Center](#)

Support: 1.866.800.0004 x2

How to set up:  
[Task](#)  
[Note Template](#)  
[Letter Template](#)  
[Discounts, Trial, and Upsell Promotions](#)

# The Perfect Customer Lifecycle™

Built Exclusively for ...



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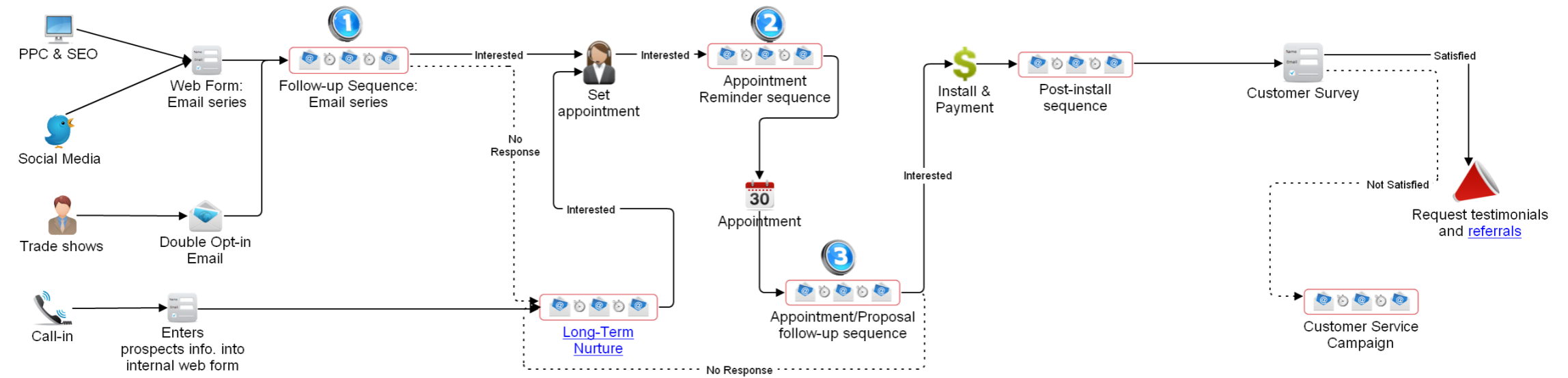
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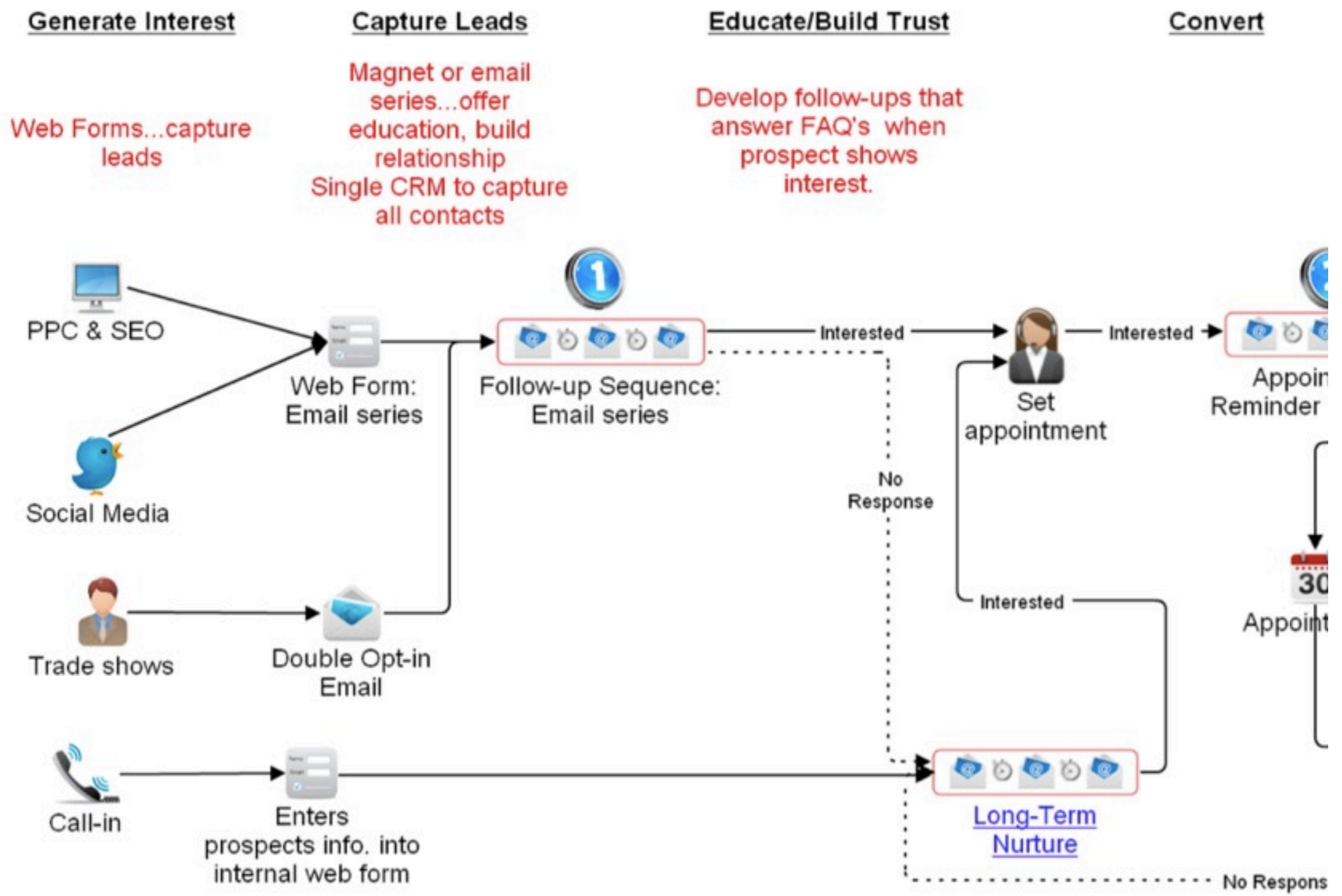
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Marketing Automation Plan (M.A.P.)



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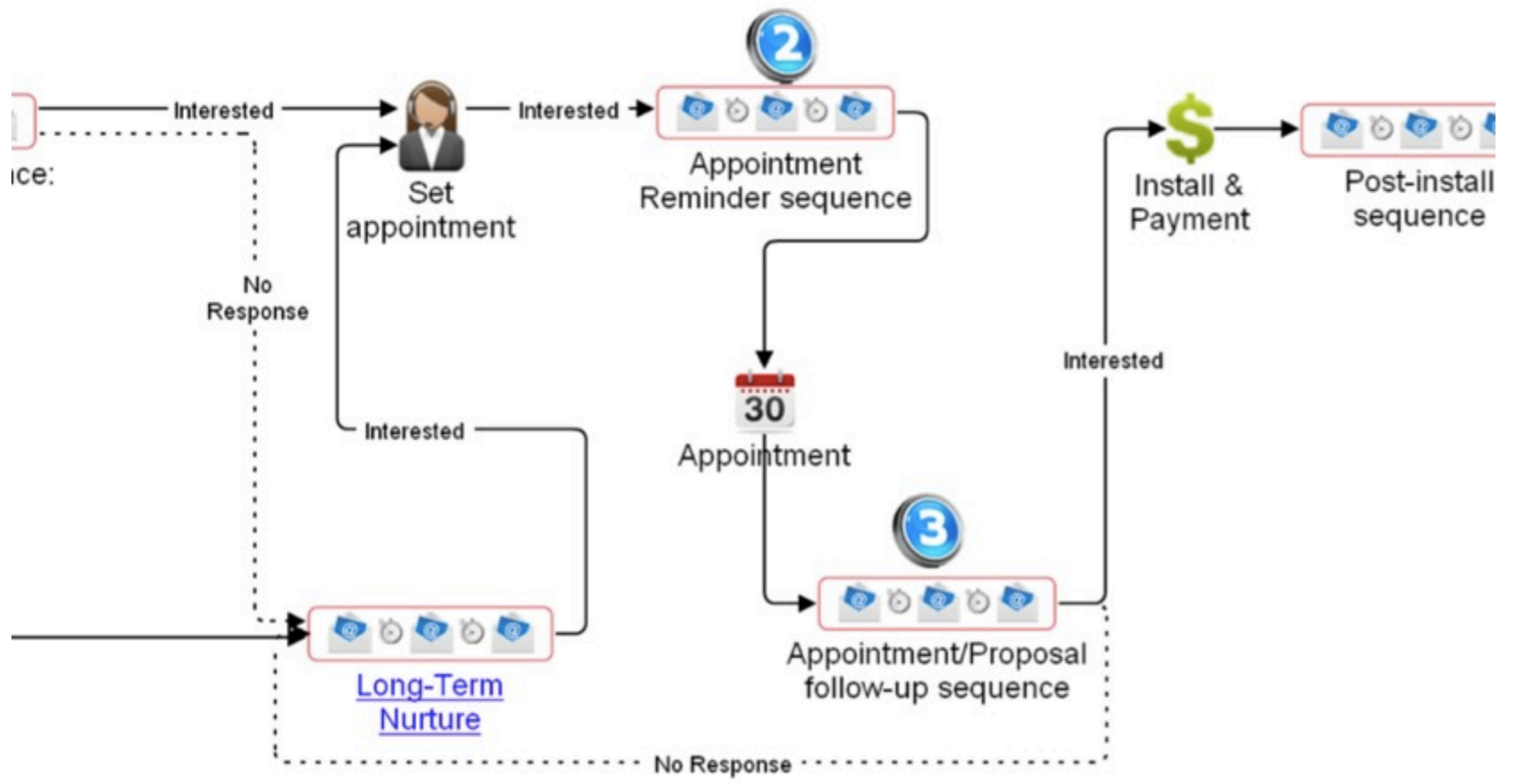
Convert

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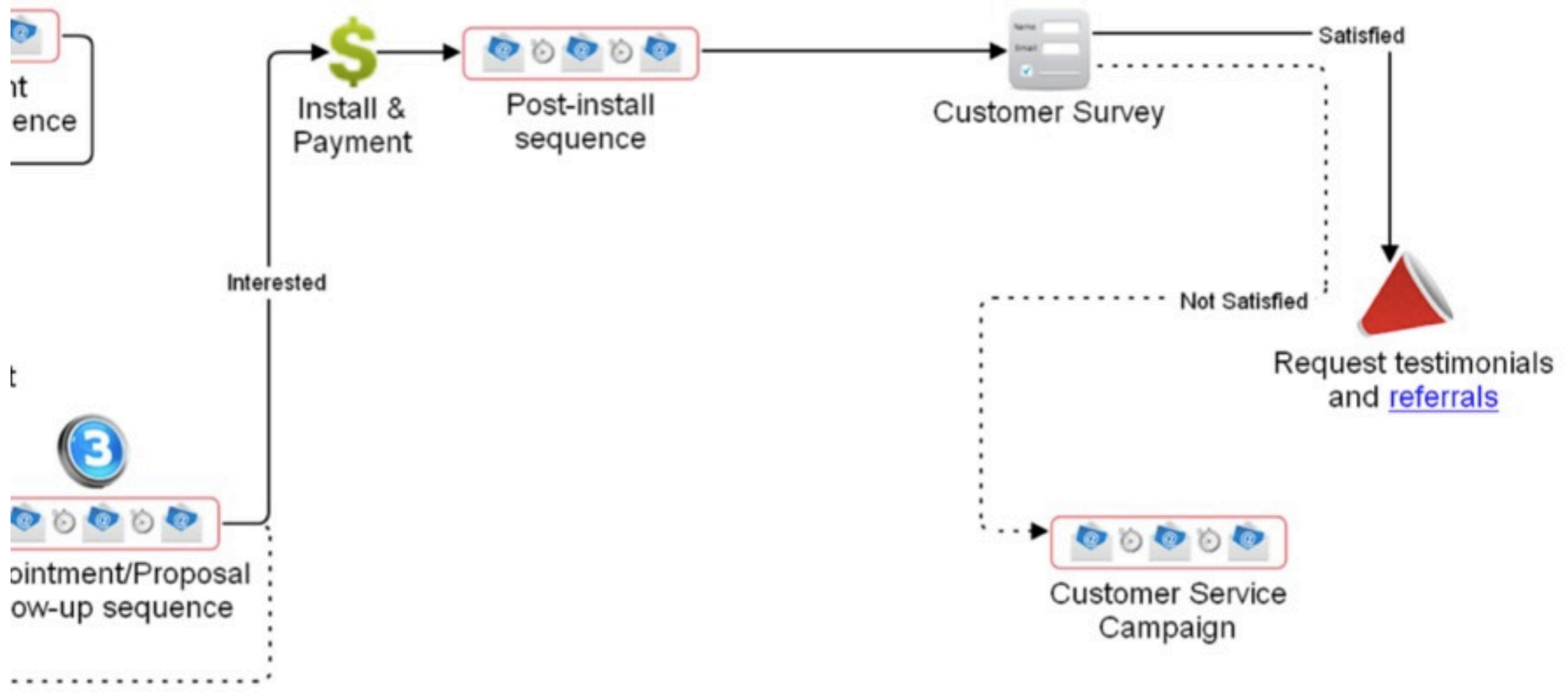
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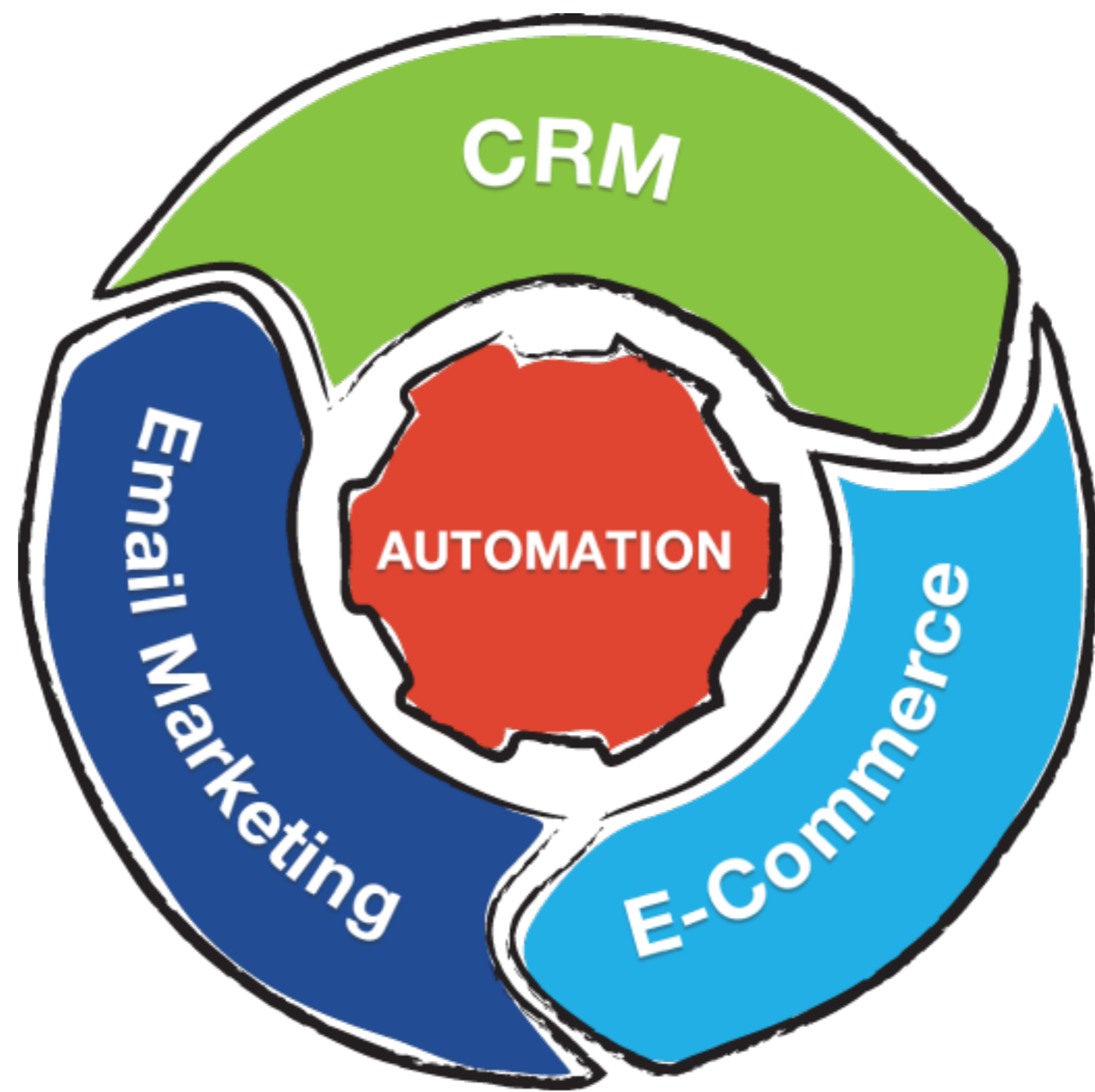
Upsell

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Automate new customer welcome and get feedback



# All-in-one

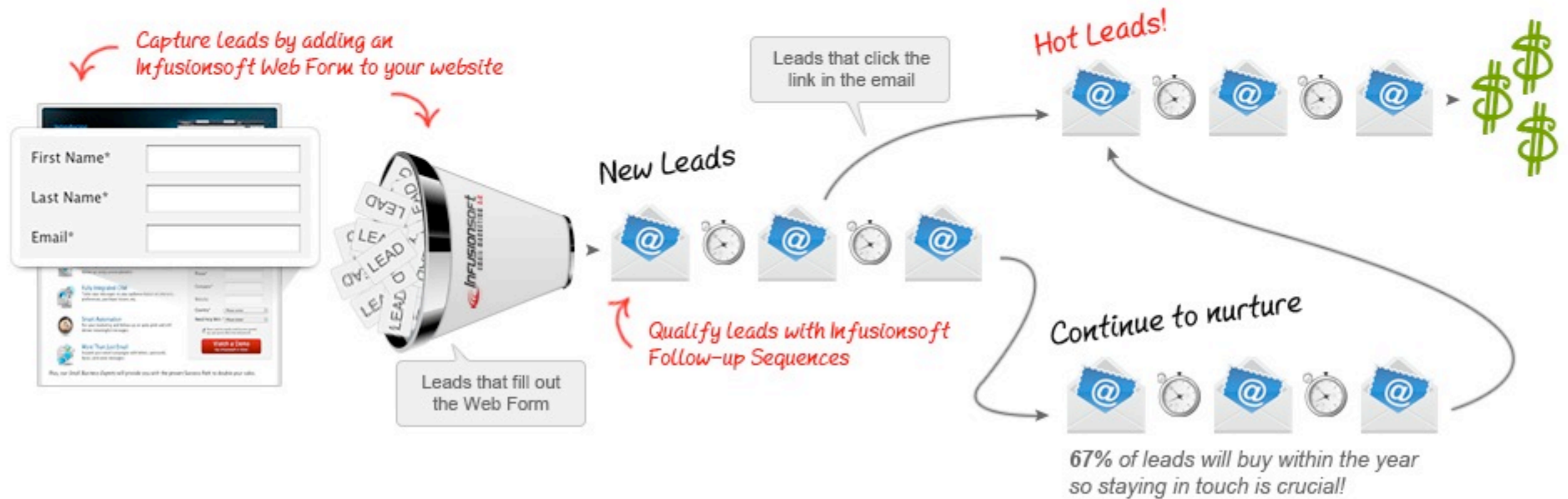


# Infusionsoft nurtures your customers while you do other things.

While you focus on what you do best  
Infusionsoft nurtures and converts leads  
and stimulates repeat business

# Let's build a campaign

## Generate & Qualify Leads from Your Website CAMPAIGN





# How's that done in Infusionsoft?

Strategy + Tools =  
Success!

# Quick-Start Bundle

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- Dedicated Success Coach will help you with:

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- Business assessment and building out your unique Marketing Automation Plan (M.A.P.) - *how you're going to plug the 3 holes*

# Quick-Start Bundle

- Dedicated Success Coach will help you with:
- Transition service - get all your data into Infusionsoft
- Business assessment and building out your unique Marketing Automation Plan (M.A.P.) - *how you're going to plug the 3 holes*
- 2 Campaign Configurations -(custom solution)

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- Business assessment and building out your unique Marketing Automation Plan (M.A.P.) - *how you're going to plug the 3 holes*
- 2 Campaign Configurations -(custom solution)
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# Quick-Start Bundle

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- Services expire 60 days after purchase

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- Stop losing customers to competitors
- Plug the holes in your business & start achieving your dreams

Our Plans	Standard	Plus MOST POPULAR	Premier	Elite	Enterprise
Monthly Price	\$199/mo.	\$299/mo.	\$499/mo.	\$699/mo.	\$999/mo.
Monthly Email Limit	Unlimited	Unlimited	500,000	1.25 MM	2.5 MM
Contact Limit	5,000	20,000	100,000	250,000	500,000
Users	2	5	10	15	20
Quick-Start Services	✓	✓	✓	✓	✓
CRM	✓	✓	✓	✓	✓
Sales Automation		✓	✓	✓	✓
Email Marketing	✓	✓	✓	✓	✓
E-Commerce		✓	✓	✓	✓
Automation	✓	✓	✓	✓	✓

Automation	↗	↗	↗	↗	↗
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# Exclusive Demo Offer



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Quick Start Bundle

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\$2,000

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Infusionsoft Monthly Subscription

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**\$1,500**

~~\$2,000~~

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Quick Start Bundle	<b>\$1,500</b>	<del>\$2,000</del>
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Plus		
Lifetime Upgrades & Unlimited Support		Included
Secure, Hosted Software w/Daily Backups		Included
Weekly Webinars, Help Center, Community		Included

**Offer good for 5 Business Days ONLY!**

# Survey

- On a scale of 1 to 5, how would you rate this demo?
  - 5: Excellent - I now have a good understanding of Infusionsoft
  - 4: Good - I get it, but I'm missing some key points
  - 3: Ok - It was ok, but it didn't "WOW" me
  - 2: Rough - I didn't get much value out of it
  - 1: Horrible - The worst demo I've ever seen

# Questions?

Call 866.800.0004 Ext. 1