2065 W. Obispo Ave. Suite 103
Gilbert, Arizona 85233
866.800.0004 | www.infusionsoft.com

Thank you for attending our webinar entitled “Your 2012 Marketing Plan: Simple & Powerful”. I hope the webinar has helped you look at your business in a new light and that it has given you a more clear vision of how you can take your business to new heights.

As promised, here are the M.A.P.s (Marketing Automation Plans) I showed on the webinar, along with a few others. I've also included a blank M.A.P. with the Perfect Customer Lifecycle along the top that you can print and use for mapping out your own business.

If you have any questions about how Infusionsoft can help you deliver on your Marketing Automation Plan, feel free to attend a live demo (http://www.infusionsoft.com/demo) or call one of our sales representatives at 866.800.0004 ext. 1.

Thank you again for attending the webinar.

Here is a guide for the rest of the pages in this document:

1. Blank M.A.P. with Perfect Customer Lifecycle
2. All About Spelling M.A.P.
3. Service Business M.A.P. (Heating & Air Condition)
4. Professional Services Business M.A.P. (Real Estate)
5. Online Retail Business M.A.P. (Watches)
6. Information Business M.A.P. (Training)
7. Technology Business M.A.P. (Healthcare Technology)
8. Information Marketing Business M.A.P
9. Web-Based Software Business M.A.P. (Online Tools)

Enjoy!

Tyler Garns
Director of Marketing

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My Perfect Customer Lifecycle™

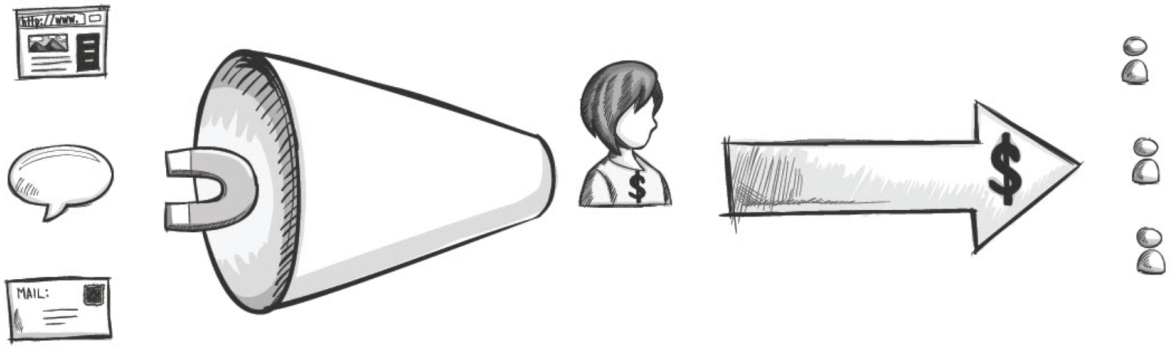
Attract Traffic	Capture Leads	Nurture Prospects	Convert Sales	Collect Cash	Deliver & Satisfy	Upsell Customers	Get Referrals
• **Online** (search & social) • **Offline** (direct mail, print) • **Partners** (affiliates)	• Create A **Magnet** • Optimize your **website** • **Tag** every captured lead	• **Educate** & provide **value (build trust)** • Have a **long-term nurture** strategy • Get prospects to **raise their hand**	• Overcome **objections** • Create **urgency** • **Follow up** consistently	• Get the **money** • Offer **payment plans** • Use automatic **Follow up**	• **Deliver** your promise. • Then **WOW** your customer • **Ask** customers how you're doing	• Create **additional products** • Offer **appropriate** products • Create **recurring revenue**.	• Ask for **testimonials** & **referrals** • **Make it easy** to refer • Always say **thank you**

Marketing Automation Plan (M.A.P.) Built For: _____

Infusionsoft

The Perfect Customer Lifecycle™

Built Exclusively for All About Spelling



	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	20 Best Tips for Teaching Spelling tag: Free Report	*Home School* Home School Teacher Follow-up *Classroom* Classroom Teacher Follow-up	Shopping Cart Sell Level 1	In-cart Upsell "Cobweb the Cat"	New Customer Sequence Upsell to Level 2 after 60 days	Shopping Cart Sell Level 2 Level 2 Customer Sequence Upsell to Level 3 after 60 days Shopping Cart Sell Level 3 Level 3 Customer Sequence Upsell to Level 4 after 60 days	

Additional Support Resources:
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™

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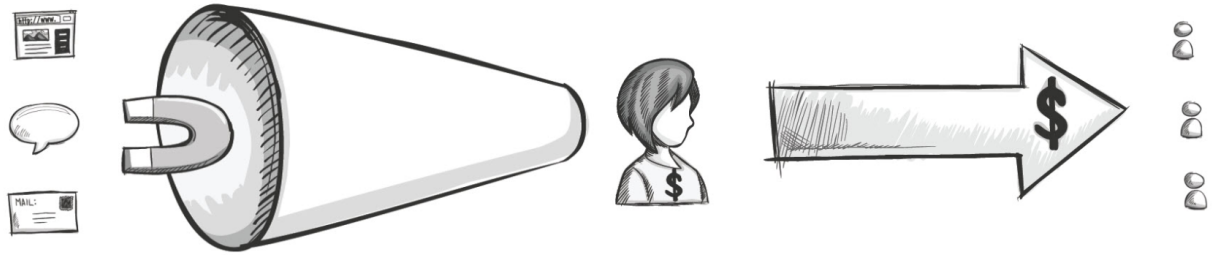
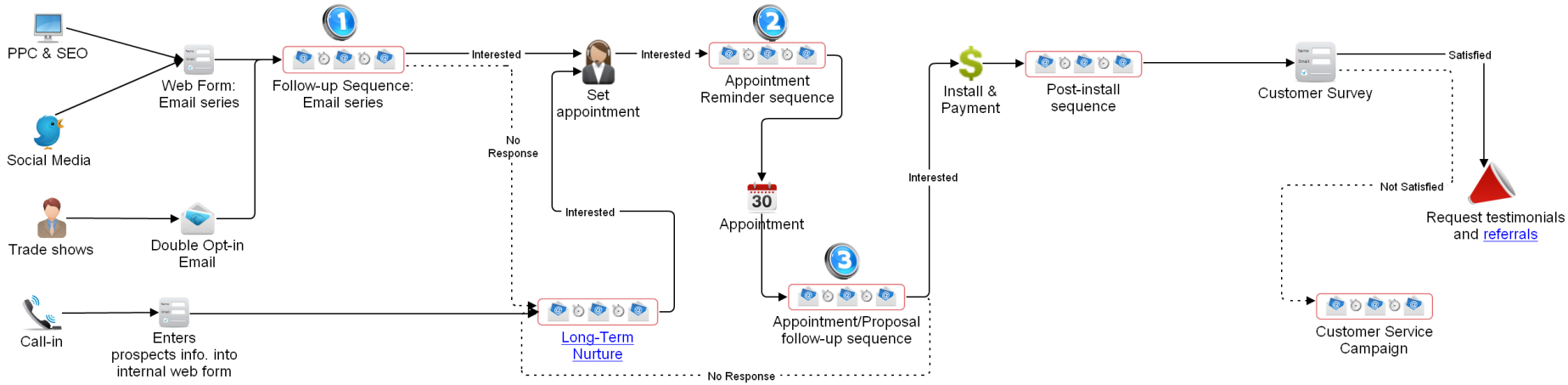


Goals & Opportunities

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:
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Letter Template
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The Perfect Customer Lifecycle™

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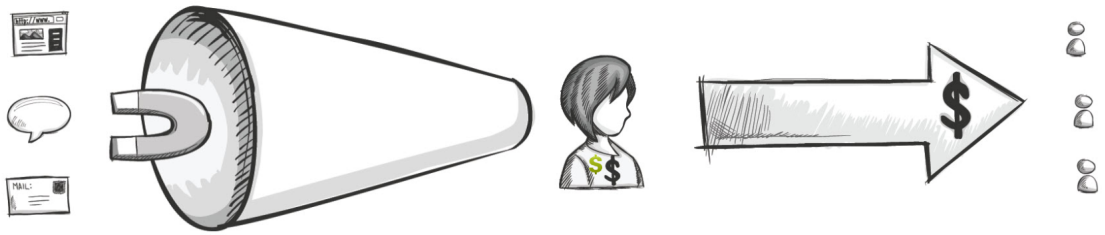
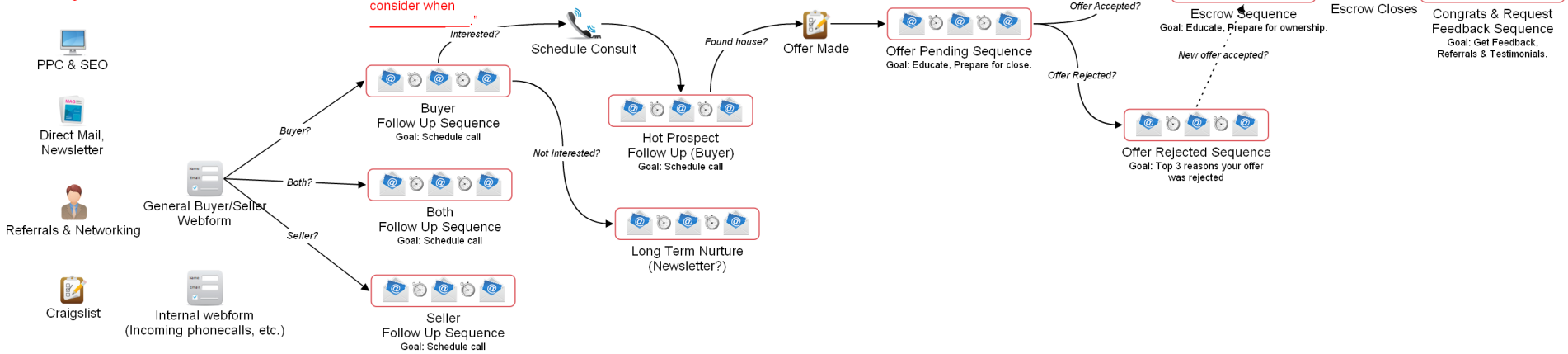


	Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates
Goals & Opportunities	Current: Direct Mail, Newsletter, Web based ads, Craigslist Future: PPC & SEO Referrals & Networking	Direct them to Website and/or Landing pages. (Under Construction) Niche landing pages	Develop follow-ups that answer FAQ's and trigger Hot Lead Seq. when prospect shows interest. "Top 3 things to consider when _____."	Drive them to the point they are ready to talk on phone	Handled offline	Stay in front of them throughout the 'waiting stage' via email, tasks to call, etc.	N/A	After houe closes, request testimonials and referrals

Marketing Automation Plan (M.A.P.)



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The Perfect Customer Lifecycle™

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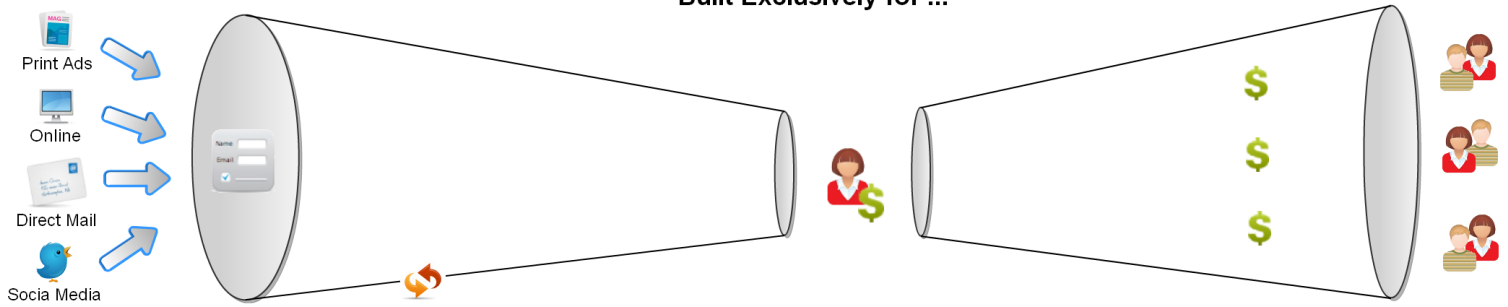

	Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates
Current State	**Sources**: ? **Traffic**: 300/day	**Magnet**: Online Estimator **Webform:** ? **Opt-Ins**: ?/mo **Conv Rt**: 40% of business off website	**Hand Raise:** Currently doing nothing	**Selling Model**: Try to call all leads	Custom Cart in use	Product shipped, no post sale 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)
	Web Forms...capture leads	Magnet : Price Calculator, DIY 7 part guide?	Develop follow-ups that answer FAQ's and trigger Hot Lead Seq. when prospect shows interest. (Optimize agents time)	Nurture them until they are ready to go online and order off the site	API into Infusionsoft	Fulfillment occurs how it already does, use Infusionsoft to urge them to go from Tile samples to full tile order	Upsell on Full tile order (from tile sample purchase)	Automatically request a quote from those who are satisfied.
Marketing Automation Plan (M.A.P.)	PPC & SEO	7 traps to avoid... Website Lead	New Lead Follow Up Interested? Hot Prospect Sequence No Response Long-Term Nurture	*Interested?* *Interested?*	Shopping Cart	New Customer Follow Up Satisfied? Not Satisfied Customer Service Campaign	Request testimonials and referrals Upsell - request a quote seq.	

Additional Support Resources:
Infusionsoft Online Support Center

Support: 1.866.800.0004 x2

How to set up:
- Task
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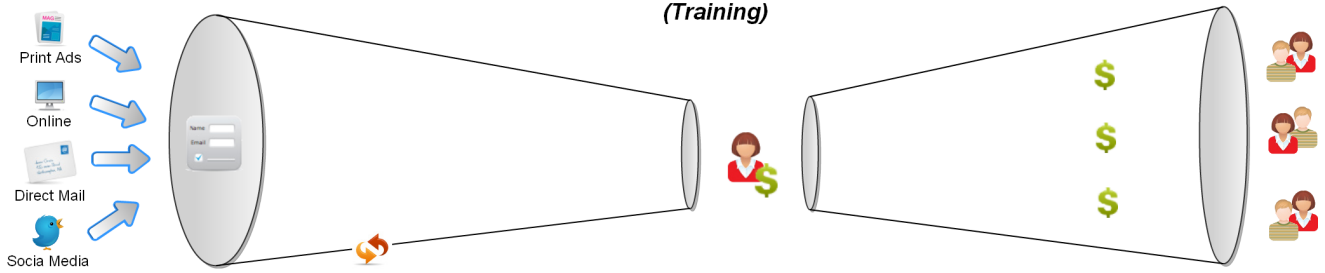
The Perfect Customer Lifecycle™

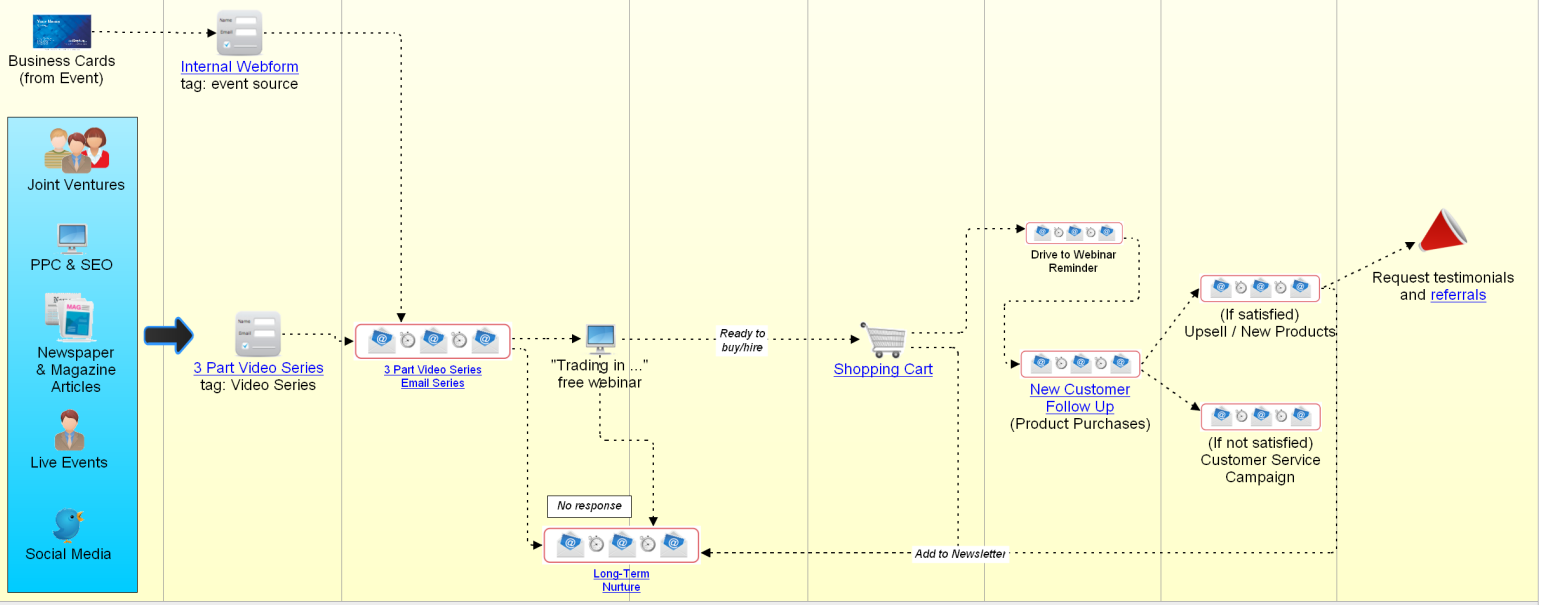
Built Exclusively for ...

(Training)



	Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates
Current State	**Sources**: Newsletter (~300); Word of Mouth, Twitter, Facebook, Website, Blog **Traffic**: ~200/mo	**Magnet**: Free Article - 13 skills employers demand in the workplace **Webform:** Hidden **Opt-Ins**: ~0/mo **Conv Rt**: 0	**Hand Raise:** N	**Selling Model**: no reps purchase online may do subscriptions	**Cart**: Not yet **Upsell**: N **Credit Card**: Not yet (does have PayPal) **Pmt Plans**: No	**Acct Mgr**: N **Ship Prod**: N (digital) **Follow Up**: N	**Prod Name**: N **Timing**: N	**Testimonial**: Have a few **Referral**: N
	(Visitors)	(Opt-Ins)	(Qualified Leads)	(Agreement To Buy)	(The Cash)	(Satisfied Customer)	(Repeat Customer)	(Testimonials & Referrals)
Goals & Opportunities	-Speaking, Joint Ventures, Colleges and Corporations, Affiliate programs. -Submit articles for college, young professionals publications	-Turn free report into a magnet. Offer via webform. -Opt-in form above the fold on home page (every page, recommended)	Break free report into an email series. Use this to establish your expertise, deliver value, build trust.	Drive to the webinar	-Enable webinar registration/payment. (May do bootcamps in future.)	Automate new customer welcome	Future: develop product progression to move from one to the next.	Corporation & college partnerships

Marketing Automation Plan (M.A.P.)



Drive to website by making a special offer or free download.

Additional Support Resources:
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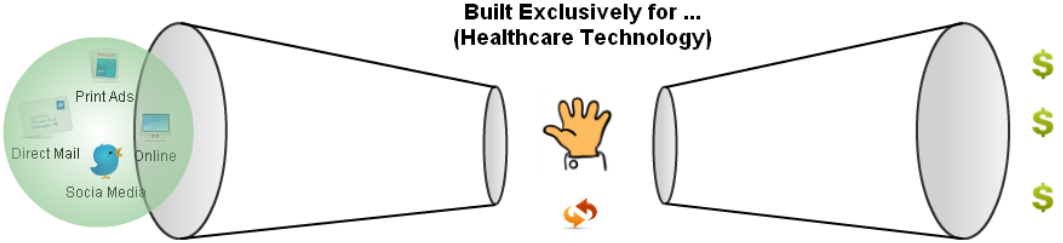
The Perfect Customer Lifecycle™

Have a question? Check out our online resource center at:
https://support.infusionsoft.com/

Built Exclusively for ...
(Healthcare Technology)



	Generate Interest	Capture Leads	Educate/Build Trust	Convert The Lead	Fulfill & Wow	Upsell	Create Advocates
	(Visitors)	*(Opt-Ins)*	*(Qualified Leads)*	*(Sales)*	*(Satisfied Customer)*	*(Repeat Customer)*	*(Testimonial/Referral)*
Current State	**Sources: 1. Lecture Circuit;2. Webinars 3. Blog; 4. Website; Social Media;** **Traffic: 5k/mo from site; 1300/mo**	**Magnet: Whitepaper** **Webform: YES** **Opt-Ins: 200/mo;** **Lectures/Webinars 1k-1.5k** **Conv Rt: N/A%**	**Hand Raise: Face to Face whitepaper foot in the door**	**Selling Model: Assign to rep** **Cart: Yes, but not now** **Upsell: YES** **Credit Card: YES** **Pmt Plans: NO**	**Acct Mgr: YES** **Ship Prod: YES** **Follow Up: YES/support/surveys**	**Prod Name: Many products and services** **Timing: post sale** *planned*	**Testimonial: Think about leveraging** **Referral: Affiliate Program**
Goals/Opportunities	expand to include social media opt in	increase opt ins from online presence and track conversion ratios	automate education for tire kickers and prompt followup subsequent	learn about opp. mgmt and the working of leads through a sales pipeline *entered into CRM; marketing person schedules; Dr. talks to clients personally; readys contracted; office mgr followup 7&30days*	put together some products for immed purchase	automate upsell with cust sat surveys and offers	create an affiliate program to increase leads and revenue
Marketing Automation Plan (M.A.P.)	Lecture Circuit Webinars Blog/Website **S1B: Existing Data** Training Tutorial Outbound Prospecting	Internal Webform: Training Tutorial Webform: List	**New Lead: Hot** click here **New Lead: Educate** Follow-Up Assign Assign Option 1 Option 2 Option 3 Non-conversion	**Opp. Mgmt** Training Tutorial New Working Won Triggers Option 1 Option 2 Option 3 Convert Unable to Contact LVM On Hold Non-conversion Convert Long-Term Nurture: Training Tutorial	**Shopping Cart:** Training Tutorial Ship Product click here	New Customer Follow Up Happy Not Testimonial/ Referral Customer Service **Discounts on Bundles** Training Tutorial	

Focus List

- 1 Campaign Configuration
- 2 Campaign Configuration
- 3 Flex Block: Training
- 4 Flex Block: Training

Additional Opportunities

Social Media:
Training Tutorial

Affiliate Program
click here

Affiliate Center
click here

Become an Infusionsoft Affiliate!!
Training Tutorial

Affiliate Messaging

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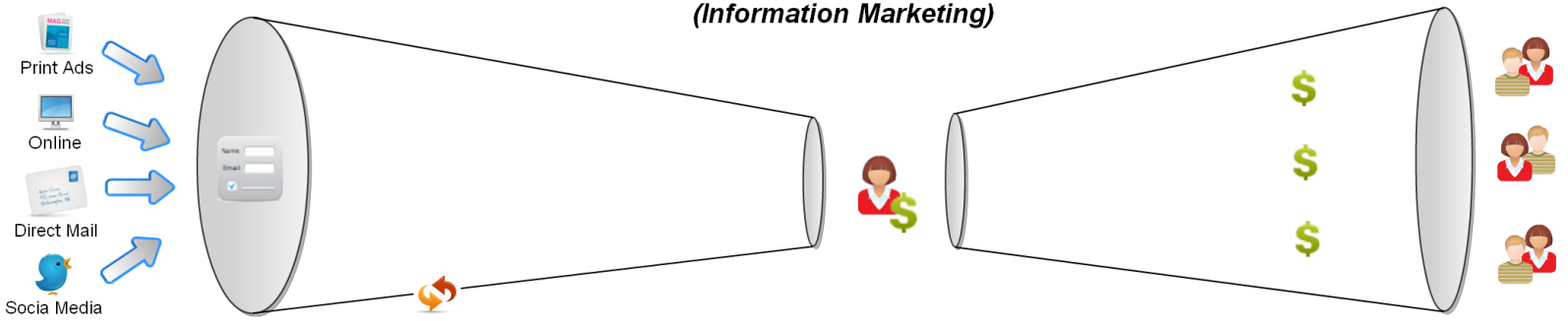
(Information Marketing)



	Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates
Current State	**Sources**: Social Media, **Traffic**: 1600/mo	**Magnet**: ? **Webform:** Opt-in form **Opt-Ins**: ?/mo **Conv Rt**: ?%	**Hand Raise:** Website, with free content (Free, hi-def videos)	**Selling Model**: Online, some direct selling via conferences and events, mostly 1-to-few	**Cart**: pay-pal **Upsell**: ? **Credit Card**: na **Pmt Plans**: na	**Ship Prod**: DVD's, course kit. **Follow Up**: No follow up strategy	**Prod Name**: NA	**Testimonial**: request via emails, and utilize FB, twitter, In.
Goals & Opportunities	(Visitors)	(Opt-Ins)	(Qualified Leads)	(Agreement To Buy)	(The Cash)	(Satisfied Customer)	(Repeat Customer)	(Testimonials & Referrals)
	Twitter, Facebook, In, Optimized for SEO,	Magnet: Videos, info Infusionsoft Opt-In	Educate & Build Trust (New Lead Campaign)	Drive them to purchase page	?	?	?	Need Testimonial/Referral Acquisition Campaign
Marketing Automation Plan (M.A.P.)	PPC & SEO Social Media	Reinvented Opt In Web Forms	*Interested?* New Lead Follow Up Follow Up Sequences	Hot Lead Campaign Follow Up Sequences No Response Actions Long-Term Nurture Follow Up Sequences	Shopping Cart Learning how you can sell online Note that there are multiple ways to sell online: Based on watching the above video, you will want to go here: Training Videos and watch the eCommerce videos relating to the method you wish to utilize.	New Member Follow Up Follow Up Sequences WP Membership Site (Either InfusionWP or DAP)	Upsell Campaign, Cross Sell campaign (Product Specific) Follow Up Sequences Buy Now Links	Capture Testimonial/Referral campaign Follow Up Sequences

The Perfect Customer Lifecycle™

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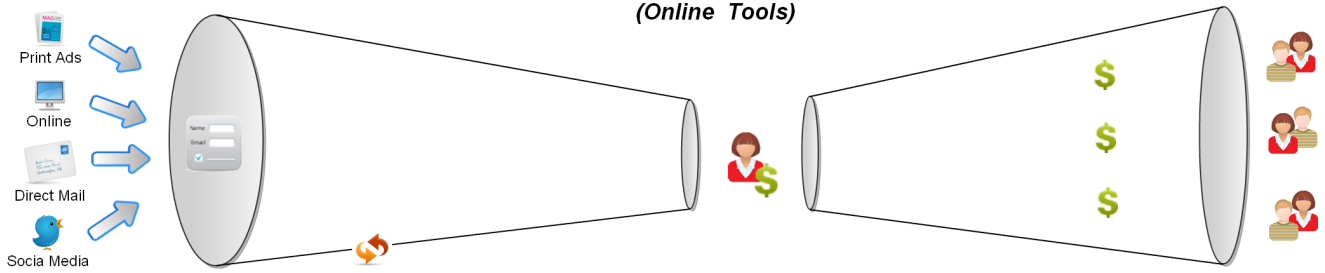
(Online Tools)



	Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates
Current State	**Sources:** Existing Lists, Joint Venture, Affiliates, PPC/PPV, FB Ads, Media Buys, Live Conferences/Webinars **Traffic:** Not Marketed/mo (mlmtoolsuite, project 1,500/day) Exisiting Lists ~40,000	**Magnet**: Free Tour/Demo **Webform:** Y **Opt-Ins**: 0/mo (not marketed) **Conv Rt**: not marketed (other sites ~25%)	**Hand Raise:** Auto-responders - educate on various features Wow-factors - use their tools to win customers Daily webinars - promoted to opt-ins only	**Selling Model**: <$5 Trial in place Low monthly fee...direct to sale	**Cart**: Y - Order form **Upsell**: Y **Credit Card**: Y **Pmt Plans**: N	**Acct Mgr**: N (customer support in future) **Ship Prod**: Not currently **Follow Up**: Y - welcome onboard, trainings, live Q&A's	**Prod Name**: Annual contract **Timing**: Immediately after Trial sign-up	**Testimonial**: Y **Referral**: Y
	(Visitors)	(Opt-Ins)	(Qualified Leads)	(Agreement To Buy)	(The Cash)	(Satisfied Customer)	(Repeat Customer)	(Testimonials & Referrals)
Goals & Opportunities	Go live and start marketing. Initial broadcast from affiliates, then from existing lists.	Transition exisiting webforms to infusionsoft	-Develop follow-ups to move trial users to purchase -Incorporate testimonials, focus on demonstating value, time savings, convenience	(direct to process sale)	AUTOMATE! Using API - automate account access. Also, enable updating of data.	Automate new customer welcome - direct them to available resources	Additional products in the future In app upsells	Mazimize Strategic Partnerships and Affiliates Systematize the testimonials.
Marketing Automation Plan (M.A.P.)	Power Networks / JV's PPC/PPV/SEO Affiliates Live Events Social Media	Free Trial Lead tag: Free Trail Facebook Lead tag: Facebook	Free Trial Follow-up No response Long-Term Nurture (Newsletter)	Ready to buy Add to Newsletter	Shopping Cart	API Activates Membership New Customer Follow Up	Satisfied Not Satisfied Upsell / New Products Customer Service Campaign	Request testimonials and referrals

Additional Support Resources:
Infusionsoft Online Support Center

Support: 1.866.800.0004 x2

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