

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

 **Infusionsoft**

A vertical sequence of illustrations. At the top, there are three documents: a 'MAIL' envelope, a document with '100%' and '100%' written on it, and a document with '100%' and '100%' written on it. Below these is a speech bubble. The central part of the image features a large, light gray funnel with a dark gray magnet on its rim. Below the funnel is a profile of a person's head with dark hair and a mustache. Below the head is a large, light gray downward-pointing arrow with a dark gray dollar sign (\$) inside its tip. At the bottom, there are three coins: two on the left, one in the middle, and two on the right.

Goals & Opportunities	Current State							
	Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates
	Sources: ? Traffic: ?/mo	Magnet: ? Webform: ? Optins: ?/mo Conv Rt: ?%	Hand Raise: ?	Selling Model: ?	Cart: ? Upsell: ? Credit Card: ? Pmt Plans: ?	Acct Mgr: ? Ship Prod: ? Follow Up: ?	Prod Name: ? Timing: ?	Testimonial: ? Referral: ?
	(Visitors)	(Optins)	(Qualified Leads)	(Agreement To Buy)	(The Cash)	(Satisfied Customer)	(Repeat Customer)	(Testimonials & Referrals)
	+	+	+	+	+	+	+	+

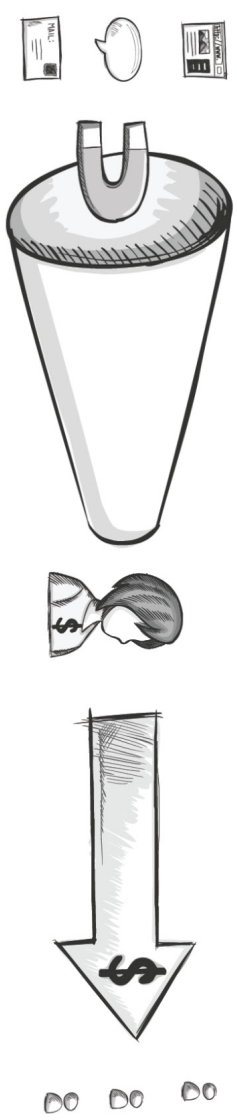
[illegible]

How to set up:

- Task
- Note Template
- Letter Template
- Discounts, Tial, and Upsell Promotions

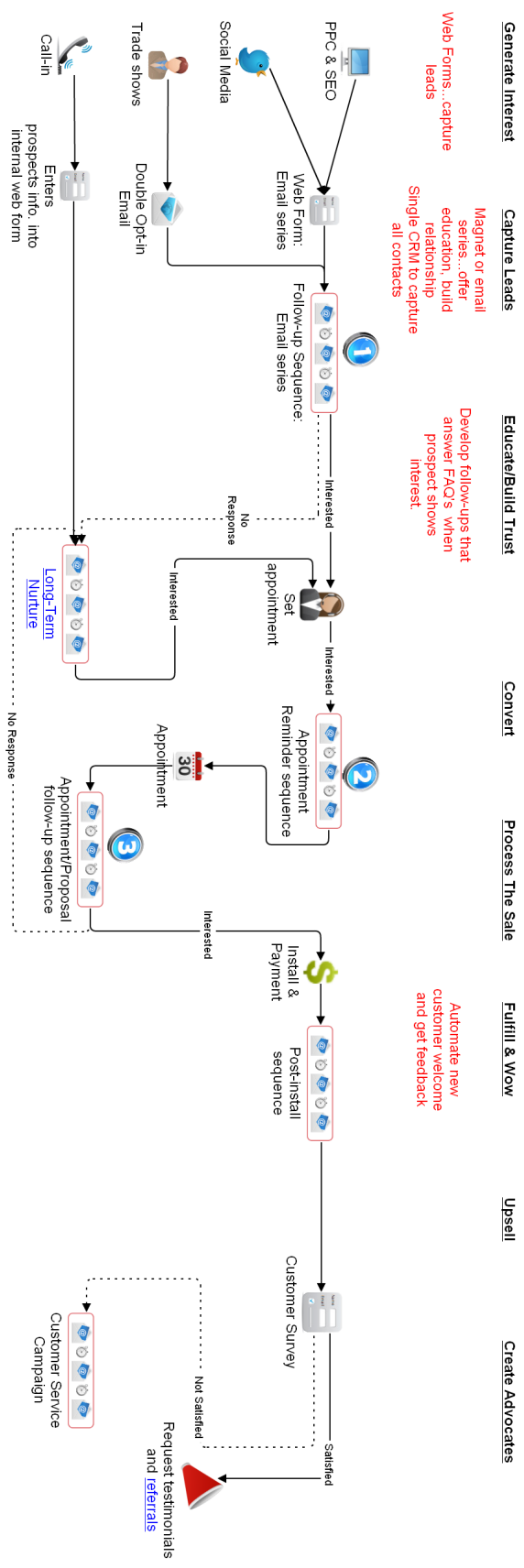
The Perfect Customer Lifecycle™

Built Exclusively for ...



Goals & Opportunities

Marketing Automation Plan (M.A.P.)

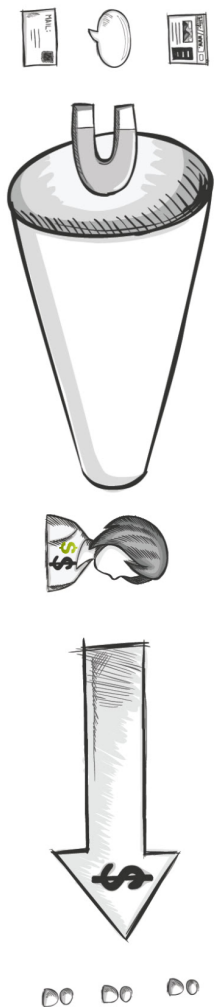


Additional Support Resources:
[Intusionsoft Fundamentals Webinars](#)
[Intusionsoft Online Support Center](#)
 Support: 1.866.800.0004 x2

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

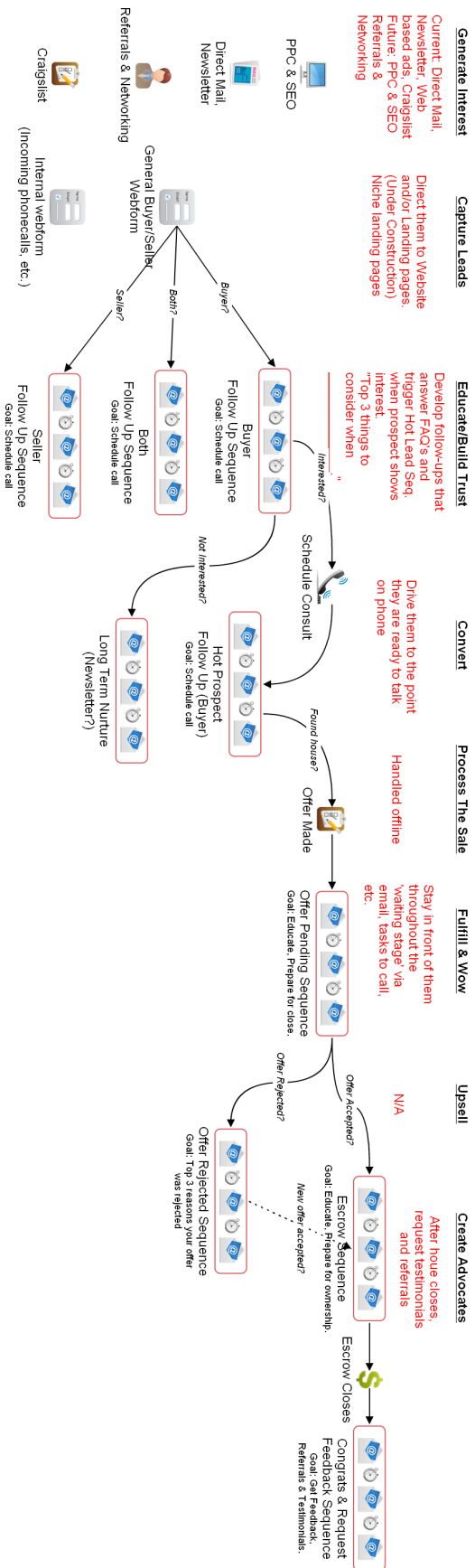
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Goals & Opportunities

Marketing Automation Plan (M.A.P.)

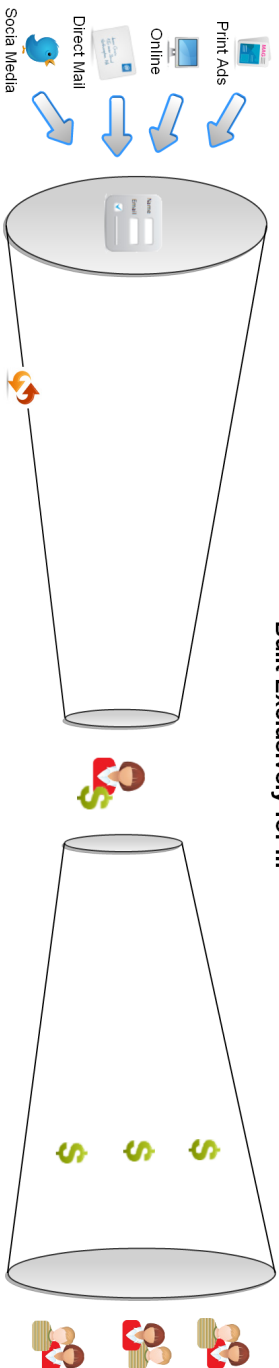


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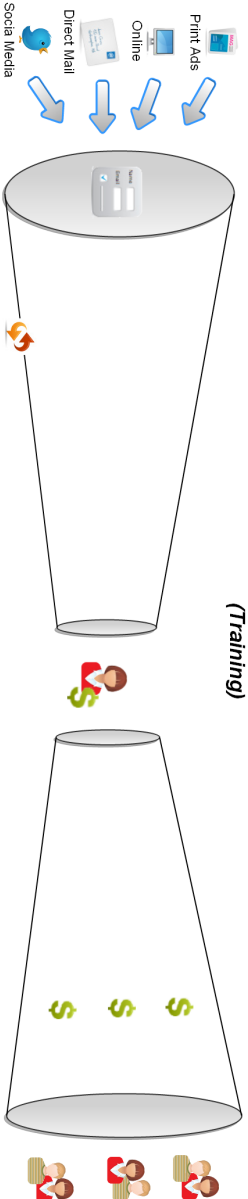
Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates
Sources: ? Traffic: 300/day	Magnet: Online Estimator Webform: ? Opt-ins: ?/mo Conv Rt: 40% of business off website	Hand Raise: Currently doing nothing	Selling Model: Try to call all leads	Custom Cart in use	Product shipped, no post sale follow up	Prod Name: ? Timing: ?	Testimonial: ? Referral: ?
(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 Title samples to full tile order	Upsell on Full tile order (from the sample purchase)	Automatically request a quote from those who are satisfied.
PPC & SEO	7 traps to avoid... Website Lead	Interested? Hot Prospect Sequence No Response No Response Interested? New Lead Follow Up Long Term Nurture	Interested? Shopping Cart	New Customer Follow Up Satisfied Not Satisfied Customer Service Campaign	Request testimonials and referrals Upsell - request a quote seq.		
<div>Additional Support Resources:</div> <div>Infusionsoft Online Support Center</div> <div>Support: 1.866.800.0004 x2</div> <div>How to set up: Task Note Template Letter Template Discounts, Trial, and Upsell Promotions</div>							

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The Perfect Customer Lifecycle™

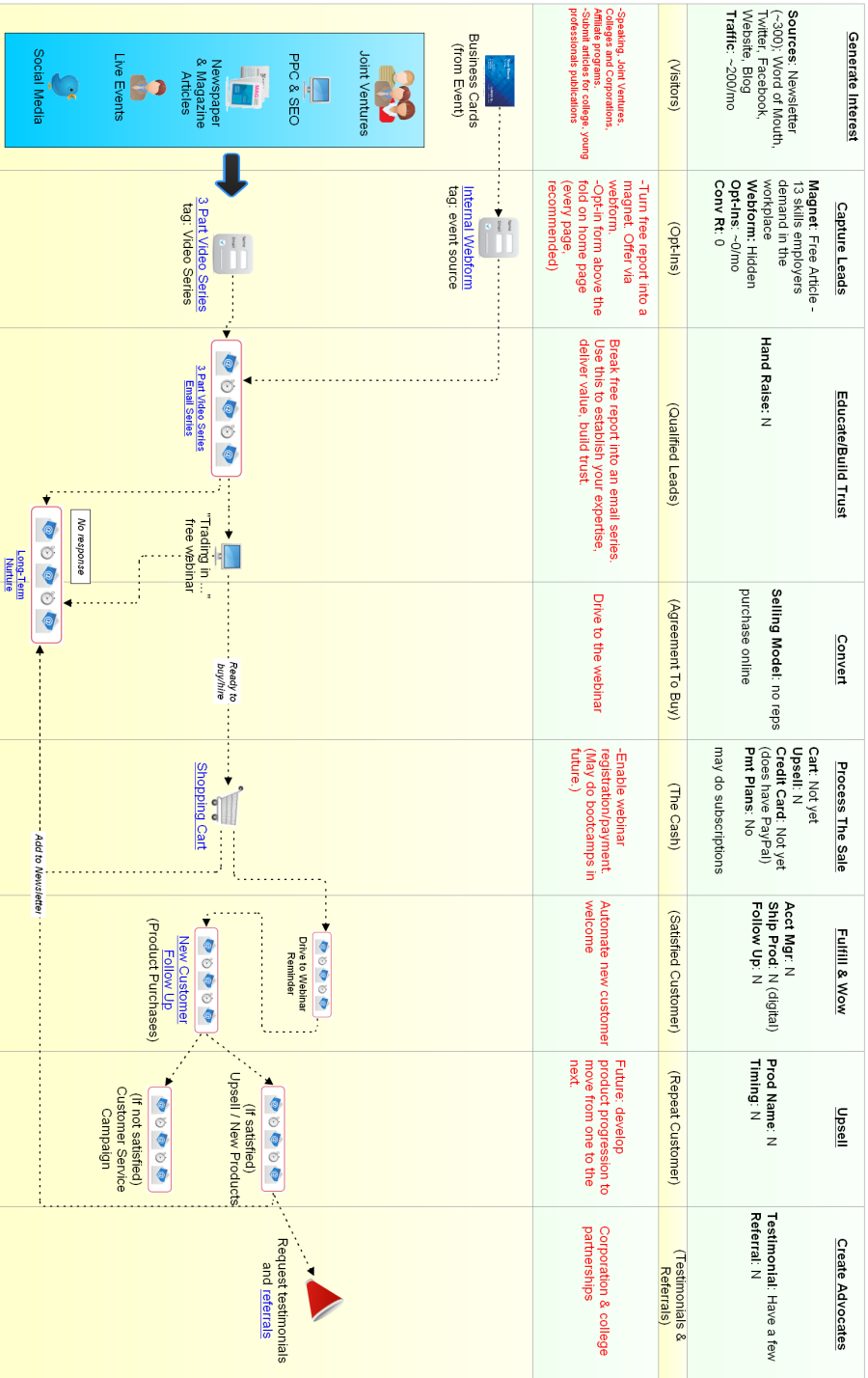
Built Exclusively for ... (Training)



Current State

Goals & Opportunities

Marketing Automation Plan (M.A.P.)



Drive to website by making a special offer or free download

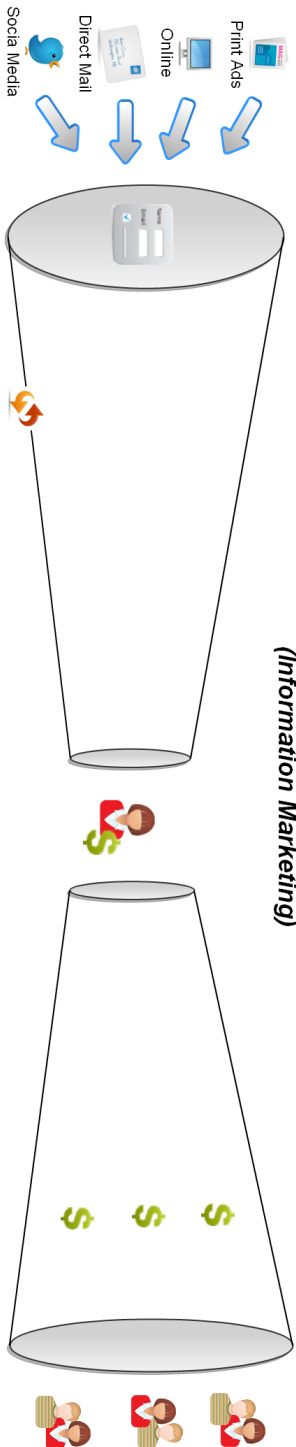
Additional Support Resources:
Infusionsoft Online Support Center

Support: 1.866.800.0004 x2

How to set up:
Task Template
Letter Template
Discounts, Trial, and Upsell Promotions

The Perfect Customer Lifecycle™

Built Exclusively for ...
(Information Marketing)



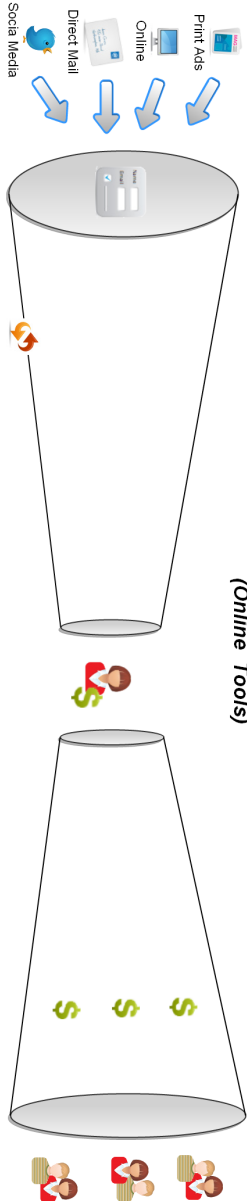
Current State	Goals & Opportunities	Marketing Automation Plan (M.A.P.)
Generate Interest Sources: Social Media, Traffic: 1600/mo	(Visitors)	PPC & SEO Social Media
Capture Leads Magnet: ? Webform: Opt-in form Opt-ins: ?/mo Conv Rt: ?%	(Opt-ins)	Reinvented Opt In Web Forms
Educate/Build Trust Hand Raise: Website, with free content (Free, In-der videos)	(Qualified Leads)	New Lead Follow Up Follow Up Sequences
Convert Selling Model: Online, some direct selling via conferences and events, mostly 1-to-few	(Agreement To Buy)	Interested? Hot Lead Campaign Follow Up Sequences No Response Actions
Process The Sale Cart: pay-pal Upsell: ? Credit Card: na Pmt Plans: na	(The Cash)	Shopping Cart Learning how you can sell online
Fulfill & Wow Ship Prod: DVD's, course kit. Follow Up: No follow up strategy	(Satisfied Customer)	New Member Follow Up Follow Up Sequences
Upsell Prod Name: NA	(Repeat Customer)	Upsell Campaign, Cross Sell campaign (Product Specific) Follow Up Sequences Buy Now Links
Create Advocates Testimonial: request via emails, and utilize FB, twitter, in.	(Testimonials & Referrals)	Capture Testimonial/Referral campaign Follow Up Sequences

Long-Term Nurture
Follow Up Sequences

WP Membership Site
(Either [InfusionWP](#) or [DAP](#))

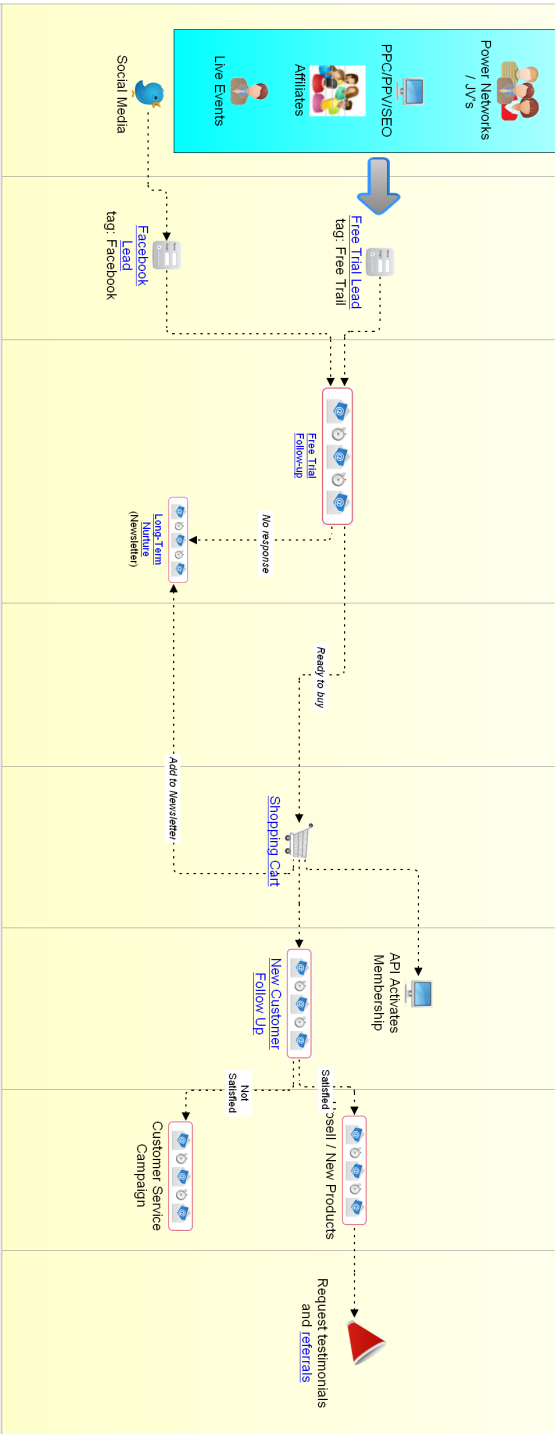
The Perfect Customer Lifecycle™

Built Exclusively for ...
(Online Tools)



Generate Interest	Capture Leads	Educate/Build Trust	Convert	Process The Sale	Fulfill & Wow	Upsell	Create Advocates
Sources: Existing Lists, Joint Ventures, Affiliates, PPC/PPV, FB Ads, Media Buys, Live Events, Webinars Traffic: Not Marketed (immediate, project 1,500/day) Existing 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	Act Hgr: N (re-report in future) Ship Prod. that 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)
Go live and start marketing, initial broadcast from affiliates, then from existing lists.	Transition existing webforms to Infusionsoft	-Develop follow-ups to move trial users to purchase testimonials, focus on demonstrating 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	Maximize Strategic Partnerships and Affiliates Systematize the testimonials.

Marketing Automation Plan (M.A.P.)



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