

## Data Transition

Information is power, and you've gone to a lot of work to input your contacts' information into various systems. We don't want you to have to do it all over again! Our Data Transition Services will help you get up and running without losing a single piece of that valuable information.

SERVICE	BLOCKS
<b>Contact/Company Record Import</b> (up to 5 lists or 1 hour*) We'll help you transition the contact records from your old providers and make sure everything is in place with Infusionsoft	<b>1 Block</b>
<b>Opportunity Record Import</b> (up to 5 lists or 2.5 hours*) Once you have your contacts in place, you need to know where they are in the sales cycle. We'll do the work to tie your contacts to opportunity records so that you can hit the ground running with your lead management operations.	<b>2 Blocks</b>
<b>Notes/Email History Import</b> (up to 3 lists or 2.5 hours*) You don't have to start from scratch when dealing with your customers. We'll import all the notes and other history tied to your contacts so that you'll have everything you need in the Infusionsoft CRM. You'll have a clear picture of what has already taken place.	<b>2 Blocks</b>
<b>Order History Import</b> (up to 2.5 hours) There's no need to rewrite the history books. You can keep all the order history and product information associated with your contacts. We'll import them so you have complete visibility.	<b>2 Blocks</b>
<b>Email Template Transition</b> (up to 5 emails or 1 hour*) You've put hard work into creating your email templates...we'll put in the hard work to transfer them to your Infusionsoft App. No need to re-invent the wheel.	<b>1 Block</b>
<b>Product/Subscriptions Import</b> (up to 1 hour*) It's time to start selling your products and subscriptions with Infusionsoft. But first, we'll help you import all of the pertinent details into your new system.	<b>1 Block</b>
<b>Recurring Orders Import</b> (up to 3.5 hours*) Don't lose the information about your customers who are on recurring billing plans. We'll make sure you don't miss a payment with our recurring orders import.	<b>3 Blocks</b>
<b>Task/Appointment Import</b> (up to 3 lists or 2.5 hours*) Don't skip a beat with your meeting schedule. We'll help you make the seamless transition to Infusionsoft with our task/appointment import.	<b>2 Blocks</b>
<b>Affiliate Record Import</b> (up to 1 hour*) Keep your trusted partners in the loop. We'll transfer your affiliate records into Infusionsoft for you, including past history, commission schedules, billing details, and more.	<b>1 Block</b>
<b>Basic Web Form Transition</b> (up to 3 forms or 1 hour*) Continue capturing leads with your current web forms. We'll duplicate your forms to use with your new Infusionsoft account. Same form; new database.	<b>1 Block</b>

\*Each additional service block will cost \$200 each.

## Contact/Company Record Import (up to 5 lists or 1 hour)

### Recommended for:

All new Infusionsoft users

### Consider this service if:

You are brand new to Infusionsoft and would like to keep your current contact information from another provider.

### Total service blocks:

1 service block

### For more information:

Contact an Infusionsoft representative at 1.866.800.0004 or email [servicesales@infusionsoft.com](mailto:servicesales@infusionsoft.com)

### Infusionsoft

2065 W. Obispo Ave. Ste. 103  
Gilbert, AZ 85233  
Phone: 866-800-0004 x1

### The first step to a successful marketing campaign

Transitioning your data from one platform to another can be a process full of headaches and hiccups – but not with Infusionsoft. We'll make sure that all of your important contact information gets in the right place inside your Infusionsoft App. Once your contacts are imported, you'll be ready to automate your marketing.

Our data transition team will help you seamlessly import your contacts from another source and organize the data just how you want it. You'll be ready to go in no time.

### Key Benefits

- Peace of mind knowing you retain all of your valuable data
- Match your companies to appropriate contact records
- Retain any current list segmentation

### What's included

- Import up to 5 contact/company lists (importing the same list 5 times equates to 5 lists)
- Set up all custom contact fields
- Set up appropriate "Tags" to retain current list segmentation
- Create the "contact to company" relationship (if needed)

### What isn't included

- Advanced imports (e.g. notes, histories, orders, opportunities, affiliates, etc.)
- Exporting the data from your current platform **or data clean-up**
- Importing the same list 5 times, then importing 4 additional lists

### PLEASE NOTE:

- The Contact/Company Record import is limited to 1 hour; Each additional block will cost \$200.
- Customer is responsible for providing their cleaned data to the Infusionsoft team (in .csv or .xls format).

## Opportunity Record Import (up to 5 lists or 2.5 hours)

### Recommended for:

Infusionsoft users who use lead management tools to categorize leads into sales stages.

### Consider this service if:

You would like to keep your current lead management information you had been using with another provider.

### Total service blocks:

2 service blocks

### For more information:

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### Infusionsoft

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### Don't miss a beat in your lead management system

If you've been working with your contacts for awhile, you've likely categorized them into various stages of the sales funnel. Opportunity records allow you to see exactly where your leads are in their progression toward making a purchase.

Our data transition team will help you import lead management data from other platforms so that everything will be visible inside your Infusionsoft App. You'll be able to pick up right where you left off – and you'll know exactly where your leads fit within the sales cycle.

### Key Benefits

- Retain the current sales stage of existing contacts
- Keep all important dates and owner information to avoid unnecessary internal lead disputes
- Use newly created opportunity records to automate your follow-up with Infusionsoft

### What's included

- Import up to 5 opportunity record lists (importing the same list 5 times equates to 5 lists)
- Match opportunity records to contacts in the database
- Recreate and apply current sales stages from previous system
- Add opportunity notes to the record (as needed)
- Add custom fields to opportunity records (as needed)

### What isn't included

- Additional advanced imports (e.g. tasks, histories, orders, affiliates, etc.)
- Exporting the data from your current platform **or data clean-up**

### PLEASE NOTE:

- The Opportunity Record import is limited to 2.5 hours; Each additional block will cost \$200.
- Customer is responsible for providing their cleaned data to the Infusionsoft team (in .csv or .xls format).
- Requires Contact/Company Record import to be completed prior to this specific import.

## Notes/Email History Import (up to 3 lists or 2.5 hours)

### Recommended for:

Infusionsoft users who want to retain email history and notes from a previous provider

### Consider this service if:

You are brand new to Infusionsoft and would like to keep the current notes/ email history for your contacts

### Total service blocks:

2 service blocks

### For more information:

Contact an Infusionsoft representative at 1.866.800.0004 or email [servicesales@infusionsoft.com](mailto:servicesales@infusionsoft.com)

### Infusionsoft

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### Bring your contacts' detailed information with you to Infusionsoft

Your prospects and customers are more than just a name, and you've worked hard to keep their information up to date. We have the tools to make sure you keep all that information as you transition to Infusionsoft.

Our data transition team will help you import all of the notes and email histories tied to your contacts. We'll put all of that information (including date stamps) in the activity history section of your Infusionsoft App. You'll be able to access this data in the future as you create new note templates and action sequences to bring your prospects through the sales cycle.

### Key Benefits

- Import all historical data from your previous system
- Keep all important dates and owner information during your transition

### What's included

- Match notes and email history to the appropriate contacts in the database
- Retrieve all attainable dates pertaining to emails and notes
- Emails will be entered as notes, but will be labeled "email" & have the subject line as the note description

### What isn't included

- Additional advanced imports (e.g. opportunities, orders, affiliates, etc.)
- Exporting the data from your current platform **or data clean-up**

### PLEASE NOTE:

- The Notes/Email History record import is limited to 2.5 hours; Each additional block will cost \$200.
- Customer is responsible for providing their cleaned data to the Infusionsoft team (in .csv or .xls format).
- Requires Contact/Company Record import to be completed prior to the Notes/Email History import.

## Order History Import (up to 2.5 hours)

### Recommended for:

Infusionsoft users who want to track order history for their contacts

### Consider this service if:

You are brand new to Infusionsoft and would like to keep the order history for your contacts

### Total service blocks:

2 service blocks

### For more information:

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### Infusionsoft

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### Keep all the order history details from your old shopping cart provider

Infusionsoft integrates your shopping cart with a powerful CRM, and that means you'll have greater visibility into your customers' behavior and needs. Our Order History Import allows you to transfer all existing data into your Infusionsoft App so that you can start seeing the benefits of a combined solution.

Our data transition team will help you import the order history of each of your contacts. We'll put all of that information into your Infusionsoft App to allow you to move away from your current shopping cart provider. You'll instantly have complete search capabilities and access to various order reports.

### Key Benefits

- You'll have greater visibility into your customers' behavior and needs
- Search for contacts based on products purchased, purchase dates, and other combinations.
- Access customized order reports

### What's included

- Match order history to the appropriate contacts in the database
- Match products to order history details
- Include affiliate details for each order (if the affiliate record import has already been completed)

### What isn't included

- Additional advanced imports (e.g. opportunities, notes, affiliates, etc.)
- Exporting the lists from your current platform **or data clean-up**

### PLEASE NOTE:

- The Order History import is limited to 2.5 hours; Each additional block will cost \$200.
- Customer is responsible for providing their cleaned data to the Infusionsoft team (in .csv or .xls format).
- Requires Contact/Company Record import to be completed prior to the Order History import.
- Requires Products/Subscriptions import to be completed prior to the Order History import.
- If affiliates are to be added, the affiliate record import must be completed prior to the Order History import.

## Email Template Transition (up to 5 emails or 1 hour)

### Recommended for:

Infusionsoft users who have existing email templates that they would like to use with Infusionsoft

### Consider this service if:

You are brand new to Infusionsoft and would like to keep your current email templates

### Total service blocks:

1 service block

### For more information:

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### Keep your old email templates alive with Infusionsoft

You probably have some email templates that have been successful in the past, and maybe you've spent a lot of time getting them just right. We don't want you to have to start over.

We'll transfer your HTML email templates into your Infusionsoft App – where they will be ready to use on demand.

### Key Benefits

- Continue to use email templates that have been successful in the past
- Insert existing email templates into Infusionsoft follow-up sequences
- More time to spend on setting up automation rather than recreating emails

### What's included

- Transfer up to 5 existing email templates
- Copy all text and formatting for use in the Infusionsoft Email Builder
- Retain all sending information (i.e. from, to, cc, bcc, subject line, etc.)
- Add or create merge fields as needed

### What isn't included

- Any data transition services
- Creation of new email templates

### PLEASE NOTE:

- The Email Template transition is limited to 1 hour; Each additional block will cost \$200.
- Original graphics files will be necessary if the graphics are not online somewhere.
- The Customer is responsible for providing the email templates from existing platform.

## Product and Subscription Import (up to 1 hour)

### Recommended for:

Infusionsoft users who sell products or subscriptions online

### Consider this service if:

You are brand new to Infusionsoft and would like to transfer your existing products or subscriptions without manually recreating everything

### Total service blocks:

1 service block

### For more information:

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### Infusionsoft

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### Input all of your products and subscriptions into Infusionsoft

You're poised to start using Infusionsoft to manage the sale of your products and subscriptions. But first, you have to build up your base of information.

Our data transition team will help you import all of your product and subscription information into Infusionsoft. You'll avoid the painstaking process of manually transferring all your data and be able to start selling your products with Infusionsoft right away.

### Key Benefits

- Import your products and subscriptions without manually recreating them
- Tie your products and subscriptions to contact order history and shopping cart functions
- Save hours of time

### What's included

- Add products and subscriptions to Infusionsoft
- Import pricing and details with each product
- Import pricing and cycle information for each subscription

### What isn't included

- Importing existing order history
- Importing subscriptions to specific contact records
- Additional advanced imports (e.g. opportunities, histories, notes, affiliates, etc.)
- Exporting the data from your current platform **or data clean-up**

### PLEASE NOTE:

- The Product/Subscription import is limited to 1 hour; Each additional block will cost \$200.
- Customer is responsible for providing their cleaned data to the Infusionsoft team (in .csv or .xls format).

## Recurring Orders Import (up to 3.5 hours)

**Recommended for:**

Infusionsoft users who manage customer subscriptions

**Consider this service if:**

You are brand new to Infusionsoft and would like to transfer your subscriptions and billing details without manually recreating everything

**Total service blocks:**

3 service blocks

**For more information:**

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**Infusionsoft**

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**Transfer your existing recurring customers into Infusionsoft**

Keep your recurring customers active in their existing subscriptions without having them sign up again. We'll help you transfer all the details surrounding your recurring subscriptions, including billing information.

You'll be able to keep your existing billing dates and cycle periods. Your customers will never even know you made the switch, and you'll (thankfully) avoid the billing hassles that normally accompany a change.

**Key Benefits**

- Save time and avoid manually recreating your recurring orders
- Allow your customers to keep their existing billing dates and subscription cycle
- Avoid potential cancellations that come from asking your customers to sign up for their subscription again

**What's included**

- Your current subscriptions will be added to your contacts in Infusionsoft
- Retaining existing billing dates and pricing

**What isn't included**

- The recurring orders import does not include existing order history
- Additional advanced imports (e.g. opportunities, histories, notes, affiliates, etc.)
- Exporting order information from your current platform **or data clean-up**

**PLEASE NOTE:**

- The Recurring Orders import is limited to 3.5 hours; Each additional block will cost \$200.
- Customer is responsible for providing their cleaned data to the Infusionsoft team (in .csv or .xls format).

## Task/Appointment Import (up to 3 lists or 2.5 hours)

### Recommended for:

All new Infusionsoft users

### Consider this service if:

You are brand new to Infusionsoft and would like to keep your current contact information from another provider.

### Total service blocks:

2 service blocks

### For more information:

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### Infusionsoft

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### Keep track of your existing tasks and appointments

There's no need to rewrite your calendar just because you switched to Infusionsoft. We'll help you transfer all of your current calendar items into Infusionsoft, where you'll experience the ultimate in organization and automation.

You'll be able to keep all of your existing tasks and appointments with this custom import.

### Key Benefits

- Save time and avoid manually recreating your calendar in Infusionsoft
- Have each of your tasks (whether pertaining to you or a contact) imported
- Ensure that tasks or appointments assigned to customers appear on their contact record

### What's included

- Import tasks and appointments from another provider into the Infusionsoft calendar
- Match tasks and appointments to specific contact records
- Retain dates and times for all calendar items
- Past tasks will be included in the "activity" section and look like a note

### What isn't included

- Importing contacts
- Additional advanced imports (e.g. opportunities, orders, notes, affiliates, etc.)
- Exporting task/appointment information from your current platform **or data clean-up**

### PLEASE NOTE:

- The Task/Appointment import is limited to 2.5 hours; Each additional block will cost \$200.
- Customer is responsible for providing their cleaned data to the Infusionsoft team (in .csv or .xls format).
- Requires Contact/Company record import to be completed prior to the Task/Appointment import.

## Affiliate Record Import (up to 1 hour)

### Recommended for:

Infusionsoft users who use affiliates and partners

### Consider this service if:

You have existing affiliates in another system and plan on using the Infusionsoft affiliate module

### Total service blocks:

1 service block

### For more information:

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### Don't lose your affiliate tracking information

If you're using partners and affiliates to help in the sales process, you don't want to lose the momentum you've built. But transferring affiliate records into a new system can be a real burden.

Our data transition team is ready to care of the heavy lifting for you. We'll import your affiliate records, codes, credentials, and history. That means you save time, and your affiliates remain happy. Don't miss out on a single referral because of transition issues – let us have you up and running immediately.

### Key Benefits

- Save time and avoid manually recreating affiliate records
- Allow affiliates to retain their current credentials (i.e. user name, password, etc.)
- Keep affiliates assigned to specific contact records for future tracking and reporting

### What's included

- Import affiliates as contacts and then convert to affiliates
- Maintain current affiliate credentials and codes (if possible)
- Link affiliates to their referrals

### What isn't included

- Importing contacts other than the actual affiliate
- Additional advanced imports (e.g. opportunities, orders, notes, histories, etc.)
- Exporting affiliate record information from your current platform **or data clean-up**

### PLEASE NOTE:

- The Affiliate Record import is limited to 1 hour; Each additional block will cost \$200.
- Customer is responsible for providing their cleaned data to the Infusionsoft team (in .csv or .xls format).

## Basic Web Form Transition (up to 3 forms or 1 hour)

### Recommended for:

Infusionsoft users who have web forms on their website

### Consider this service if:

You have existing web forms and plan on using them with Infusionsoft

### Total service blocks:

1 service block

### For more information:

Contact an Infusionsoft representative at 1.866.800.0004 or email [servicesales@infusionsoft.com](mailto:servicesales@infusionsoft.com)

### Infusionsoft

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### Continue capturing leads from your existing web forms

Hopefully you've been capturing leads on your website with a web form. If so, you don't want to interrupt the process. We'll help you use your existing web form to send contact information to Infusionsoft.

Our data transition team will convert your existing web forms to work with the Infusionsoft database. You'll be able to tap into the automation power of Infusionsoft right away – without recreating your web forms.

### Key Benefits

- Save time and avoid recreating your current web forms
- Continue to use the web forms that have been successful in the past
- Our form creator will copy your existing web form style while transferring the information capture to Infusionsoft

### What's included

- Recreate up to 3 web forms from your existing site and put them into Infusionsoft

### What isn't included

- Data transition services
- Web design

### PLEASE NOTE:

- The Basic Web Form Transition is limited to 1 hour; Each additional block will cost \$200.
- Customer is responsible for providing current web form location and information.

## Campaign Configuration (up to 2 hours)

### Recommended for:

Recommended For:

Customers with a need to graduate from a broadcast email to an automated follow-up sequence

### Consider this service if:

You need automate any of your prospect or customer communication

### Total service blocks:

2 service blocks

### For more information:

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### Campaign Configuration

Your email marketing campaigns drive sales conversions, repeat business, referrals, and much more. It's time to get your campaigns dialed in to your overall marketing strategy.

Our experts will help you map out your campaigns and walk you through the steps to set them up in your Infusionsoft application.

### Key Benefits

- Leverage the power of marketing automation to increase conversion rates, or decrease costs
- Leverage someone who has an in-depth knowledge of Infusionsoft's automated follow-up sequences and understands how to apply them effectively to your needs.
- A combination of walk-through training, along with best practices.

### What's included

- Coaching on two, 1-hour consulting calls to enable you to launch your desired campaign
- A customized, printable campaign template which includes: (1) a suggested follow-up schedule, (i.e. delay days), (2) detailed suggestions for each piece in the sequence, and (3) additional campaign details like triggers & automation
- Recommended training resources to execute the campaign

### What isn't included

- Copywriting
- Hands-on Infusionsoft set up and execution for you (e.g. web form, sequence, template configuration, etc.)
- More than 2 calls – the Campaign Configuration calls are limited to a combined maximum of 2 hours

### PLEASE NOTE:

- The Campaign Configuration is limited to 2 hours; Each additional block will cost \$200.

## Module Configuration (up to 2 hours)

### Recommended for:

Infusionsoft users who are looking to expand their automation to include ecommerce, affiliate management, or opportunity management (sales pipeline) operations

### Consider this service if:

You need to configure one of Infusionsoft's advanced modules for use in your business

### Total service blocks:

2 service blocks

### For more information:

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### Get up and running with Infusionsoft's most advanced features

Web forms capturing leads? Check. Follow-up campaigns in place? Check. It looks like you have a firm grasp on the Infusionsoft basics, so it's time to dig a little deeper. You're ready for the next step.

The Module Configuration Session is the best way to discover how you can take your marketing to the next level with Infusionsoft. Whether it be selling more products online, managing and automating the sales pipeline, or leveraging affiliates to help you sell, there's an advanced Infusionsoft module that will make your life easier. We'll walk you through the steps needed to put one of these modules in place for your business.

### Key Benefits

- Receive one-on-one coaching from an Infusionsoft expert
- Gain a sound understating of one of Infusionsoft's advanced modules and how to use it in your business

### What's included

- Will cover 1 of the following modules: eCommerce, Affiliate Management, or Opportunity Management
- Coaching that will enable you to set up the desired module & an in-depth understanding of how it works

### What isn't included

- Hands-on Infusionsoft set up and execution **for** you (e.g. web form, sequence, template configuration, etc.)

### PLEASE NOTE:

- The Module Configuration Session is limited to 2 hours; Each additional block will cost \$200.

## End-User Training Session (1.5 hours)

### Recommended for:

Infusionsoft users who need additional training for themselves or their teams

### Consider this service if:

You are brand new to Infusionsoft and want in-depth training or you have new employees who need to learn the software

### Total service blocks:

1 service block

### For more information:

Contact an Infusionsoft representative at 1.866.800.0004 or email [servicesales@infusionsoft.com](mailto:servicesales@infusionsoft.com)

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### Put you and your staff on the same page

You may not be the only one in your office using Infusionsoft. As you add new employees or shift roles, you will need to get them up to speed on the software. Our end-user training is a great way to get the specific training you or your staff needs to be successful.

This is also a great way to expand on the concepts taught in the Kick-off Training Session.

### Key Benefits

- Expert training for you and your staff
- Full flexibility to choose topics where you need the most help
- In-depth training on specific aspects of the software

### What's included

- A 15-min. pre-call with a designated point of contact to establish an agenda & to schedule the session
- An hour-long live webinar hosted by an Infusionsoft expert
- Video recording of the webinar for future reference
- 15 minutes of Q&A at the end of the session
- Step-by-step training on any or all of the following features:
  - The user dashboard, user records and permissions, email signatures, the Infusionsoft Success Path, people records, email templates, email broadcasting

### What isn't included

- Hands-on Infusionsoft set up and execution **for** you (e.g. web form, sequence, template configuration, etc.)

### PLEASE NOTE:

- The End-User Training Session is limited to 1.5 hours; Each additional block will cost \$200.
- Customer is responsible for providing the contact information of the designated point of contact.

## Infusionsoft Success Course

### Recommended for:

Infusionsoft users who want to learn how to market the Infusionsoft way

### Consider this service if:

You want in-depth training on how Infusionsoft can take your business to the next level

### Total service blocks:

3 service blocks (2 people)

### For more information:

Contact an Infusionsoft representative at 1.866.800.0004 or email [servicesales@infusionsoft.com](mailto:servicesales@infusionsoft.com)

### Infusionsoft

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### Get totally Infused...and on the fast-track to success

Are you ready to become an Infusionsoft expert? The best way is to be totally immersed in the software. So what better way than to come to Infusionsoft HQ where we use the software every day? You and a guest will spend 2 days soaking in marketing strategies, software tips, advanced features, and the Infusionsoft energy.

In addition to group sessions and mastermind breakouts, you'll receive one-on-one coaching. You'll leave with all the tools needed to hit the ground running when you return to your business.

### Key Benefits

- Learn the power of Infusionsoft in a real-life setting
- Learn the ins and outs of email deliverability, email marketing 2.0, automation, follow-up, and more
- Take a tour of the Infusionsoft office and experience our fun culture

### What's included

- Two days of intense Infusionsoft training for up to 2 users
- Hands-on experience in sending email broadcasts, creating campaigns, setting up sequences
- Advanced training on other Infusionsoft modules
- Breakfast and lunch both days

### What isn't included

- Hands-on Infusionsoft set up and execution for you (e.g. web form, sequence, template configuration, etc.)
- Travel expenses and hotel accommodations

## Ask the Experts Session (1 hour)

### Recommended for:

Infusionsoft users who have specific, in-depth questions

### Consider this service if:

You would like to discuss your Infusionsoft questions with a marketing automation expert

### Total service blocks:

1 service block

### For more information:

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### You have questions...we have answers

With any software application, there are bound to be questions that arise. You might have a list of things you've been meaning to ask, but just haven't had the opportunity. Now's your chance to get some answers.

During your "ask the experts" session, you'll have the full attention of one of our Infusionsoft experts. He/she will allow you to lead the conversation, answering any and all questions that you have.

### Key Benefits

- Personal Q&A session with an Infusionsoft expert
- Resolution to nagging questions
- No waiting in the support queue
- Specific help on any module or process within Infusionsoft

### What's included

- 1 hour of time with an Infusionsoft marketing automation expert
- Answers to any questions pertaining to Infusionsoft

### What isn't included

- Hands-on Infusionsoft set up and execution *for* you (e.g. web form, sequence, template configuration, etc.)

### PLEASE NOTE:

- The Ask the Experts session is limited to 1 hour; Each additional block will cost \$200.

## Infusionsoft Tune-Up Service (up to 2 hours)

### Recommended for:

Infusionsoft users who are looking for ways to improve their usage of the software

### Consider this service if:

You feel you could be doing more to leverage the software in your business

### Total service blocks:

2 service blocks

### For more information:

Contact an Infusionsoft representative at 1.866.800.0004 or email [servicesales@infusionsoft.com](mailto:servicesales@infusionsoft.com)

### Infusionsoft

2065 W. Obispo Ave. Ste. 103  
Gilbert, AZ 85233  
Phone: 866-800-0004 x1

### Make sure your marketing automation is running at peak performance

Do you have any room for improvement in your marketing? If you're like most businesses, you wouldn't turn down a little progress...no matter how well you're doing. We have just the thing to help you squeeze even more out of your Infusionsoft App.

Our specialist will discuss your day-to-day operations and determine areas where you can leverage Infusionsoft to improve performance. The tune-up service is a customized consulting service designed to provide you with a list of improvements you can easily make and a game plan for how you can implement the changes in Infusionsoft.

### Key Benefits

- Receive one-on-one coaching from an Infusionsoft expert
- Get a diagnosis of your business' pain points and areas where Infusionsoft can help
- Receive a comprehensive list of action items for you to consult as you take your business to the next level

### What's included

- An independent audit of your Infusionsoft App (prior to the session) to analyze how you are using your app
- A 20-minute interview with an Infusionsoft expert to understand your business history and goals
- A 40-minute audit of your Infusionsoft App to analyze how you are using your app
- A 60-minute interview session with an Infusionsoft expert discussing the findings of the audit with detailed action items to help improve your Infusionsoft usage
- Identify relevant training resources

### What isn't included

- Hands-on Infusionsoft set up and execution **for** you (e.g. web form, sequence, template configuration, etc.)

### PLEASE NOTE:

- The Infusionsoft Tune-Up Service is limited to 2 hours (1 hour of pre-call audit; 1.5 hours on the call); Each additional block will cost \$200.

## Infusionsoft Marketing Automation Plan (M.A.P.) (up to 2 hours)

### Recommended for:

New Infusionsoft users who are looking for direction on how to make the most of their software

### Consider this service if:

You do not yet have a strong understanding of Infusionsoft or need direction in your marketing strategy

### Total service blocks:

2 service blocks

### For more information:

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### Infusionsoft

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Gilbert, AZ 85233  
Phone: 866-800-0004 x1

### A game plan for how to use Infusionsoft to revolutionize your marketing

You've just purchased a powerful marketing automation tool...now what? We're here to show you exactly what Infusionsoft can do for your business. The Marketing Automation Plan is a step by step process that will help us determine your business needs and then chart out a plan for putting Infusionsoft to work for you.

When we have completed the Marketing Automation Plan, you will be ready to capture leads, create campaigns, automate your follow-up, and increase your conversion rates. Best of all, you'll know exactly how everything falls into place. You'll have a vision of where your business is going and how Infusionsoft will help you get there.

### Key Benefits

- Receive one-on-one coaching from a marketing expert
- Focus your attention on the most important processes that will allow you to start seeing results
- Gain an overall vision of your business and marketing automation plan
- See how your Infusionsoft App will help you implement and execute your plan

### What's included

- Interview with your Success Coach to understand your business history & goals
- A customized, printable flowchart (M.A.P.) detailing your customer lifecycle
- Recommendations about which campaigns to launch
- Identify relevant training resources

### What isn't included

- A software training session
- Implementation of these strategies (the M.A.P. is a planning and strategy tool)
- Hands-on Infusionsoft set up and execution **for** you (e.g. web form, sequence, template configuration, etc.)

### PLEASE NOTE:

- The M.A.P. session is limited to 1 hour; Each additional block will cost \$200.

**Email Template Customization (3 Emails up to 1.5 hours)**

**Recommended for:**

Infusionsoft Users looking maintain their look and feel throughout their email marketing

**Consider this service if:**

You are a user who likes to provide a consistent look and feel throughout the marketing process

**Total service blocks:**

1 service block/3 emails

**For more information:**

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**Quickly move your existing email templates into Infusionsoft**

Your emails are a reflection of your company – and, like it or not, you’ll be judged by your emails. Our Email Template Customization will help you create a beautiful HTML email that accurately reflects your business.

We can take your existing images and customize your templates to match your website (or whatever style you would like).

**Key Benefits**

- Use email templates that are consistent with your brand
- Look and feel like a top-notch company
- This will allow you to put more focus on setting up your automation vs. spending time customizing email templates

**What’s included**

- HTML email templates that accurately reflect your business brand
- Customize your templates with your **existing images** to reflect the design and feel of your brand
- Set templates as default (e.g. a newsletter template, a sequence template, etc.)

**What isn’t included**

- Logo and/or image design and creation – we only use existing images provided by the Customer

**PLEASE NOTE:**

- The Email Template Customization is limited to 1.5 hours; each additional block will cost \$200.

## Thank-You Page Customization (1 page up to 2.5 hours)

**Recommended for:**

Infusionsoft Users looking to give their customers a consistent look and feel

**Consider this service if:**

You are also setting up a Web Form or a New Lead campaign

**Total service blocks:**

2 service blocks/1 thank-you page

**For more information:**

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**Quickly move your existing thank-you page into Infusionsoft**

Your brand shouldn't be isolated to your website and/or emails. When a prospect is directed to a "thank-you" page, they should still be immersed in your brand.

Using your existing images, we'll help you customize your thank-you page to reflect the design and feel of your website.

**Key Benefits**

- Use thank-you pages that are consistent with your brand
- Look and feel like a top-notch company
- This will allow you to put more focus on setting up the important marketing aspects of your application vs. getting bogged down in customization

**What's included**

- A Thank-You page that accurately reflects your business brand
- Customize your Thank-You page with your **existing images** to reflect the design and feel of your brand
- Set up Thank-You page as Default template in your App

**What isn't included**

- Logo and/or image design and creation
- We only use existing images provided by the Customer; preferably from an actual website

**PLEASE NOTE:**

- The Thank-You Page Customization is limited to 2.5 hours; each additional block will cost \$200.

**Order Form Customization (1 form or up to 3.5 hours)**

**Recommended for:**

Infusionsoft Users looking to give their customers a consistent look and feel during the buying process

**Consider this service if:**

You already have your marketing sequences in place

**Total service blocks:**

3 service blocks/1 order form

**For more information:**

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**Quickly move your existing order form into Infusionsoft**

Extend the look and feel of your website into your order forms. When a prospect is directed to an order page they should still be immersed in your brand.

We'll use your existing images to create a professional order form that will be the face of your company as you close the sale.

**Key Benefits**

- Use order forms that are consistent with your brand to increase your conversion rates
- Look and feel like a top-notch company
- This will allow you to put more focus on setting up the important marketing aspects of your application vs. getting bogged down in customization

**What's included**

- An order form that accurately reflects your business brand
- Customize your order form with your **existing images** to reflect the design and feel of your brand

**What isn't included**

- Logo and/or image design and creation
- We only use existing images provided by the Customer; preferably from an actual website

**PLEASE NOTE:**

- The Order Form Customization is limited to 3.5 hours; each additional block will cost \$200.

## Shopping Cart Customization (1 cart skin or up to 3.5 hours)

**Recommended for:**

Infusionsoft Users looking to give their customers a consistent look and feel during the buying experience

**Consider this service if:**

You already have your marketing sequences in place

**Total service blocks:**

3 service blocks/1 cart skin

**For more information:**

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**Quickly move your existing shopping cart skin into Infusionsoft**

Your Infusionsoft shopping cart has a ton of useful backend features ... but does it look like it belongs on your website? When a prospect is directed to your shopping cart, they should still be immersed in your brand.

We'll use your existing images to create a professional cart skin that will be the face of your company as you close the sale.

**Key Benefits**

- Use a shopping cart that is consistent with your brand to increase your conversion rates
- Look and feel like a top-notch company
- This will allow you to put more focus on setting up the important marketing aspects of your application vs. getting bogged down in customization

**What's included**

- A shopping cart skin that accurately reflects your business brand
- Customize your shopping cart skin with your **existing images** to reflect the design and feel of your brand

**What isn't included**

- Logo and/or image design and creation
- We only use existing images provided by the Customer; preferably from an actual website

**PLEASE NOTE:**

- The Shopping Cart Customization is limited to 3.5 hours; each additional block will cost \$200.