

## 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.

## Strategic Planning

Infusionsoft is a powerful tool...and it will revolutionize the way you run your business. But to make the most of your Infusionsoft Application, you have to give it clear direction (it is a computer application, after all). We'll use our human skills to map out specific strategies and processes that will take your business to the next level. Each of these consulting sessions will give you concrete action items that will translate into big-time success.

SERVICE	BLOCKS
<p><b>Campaign Configuration</b> (up to 2 hours*)</p> <p>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 Infusionsoft.</p>	<b>2 Blocks</b>
<p><b>Module Configuration</b> (up to 2 hours*)</p> <p>Infusionsoft is ready to handle your most sophisticated needs...from shopping cart integration to affiliate management to sales tracking. We'll walk you through the strategy and implementation needed to get you up and running with whichever module you'd like to focus on.</p>	<b>2 Blocks</b>

## Product Training

"I didn't know it could do that." It's something we hear all the time. Infusionsoft has so many bells and whistles, it's easy to miss a few things. Our Product Training Services will give you an in-depth look at exactly what Infusionsoft can do for your business.

SERVICE	BLOCKS
<p><b>End-User Training Session</b> (up to 1 hour*)</p> <p>Maybe you have a firm grasp on how Infusionsoft works...but what about your staff? This is your chance to get personal training for each of the users on your account. We'll give you an hour of individualized training for you and your staff.</p>	<b>1 Block</b>
<p><b>Infusionsoft Success Course</b> (Includes 2 registrants)</p> <p>Come to Infusionsoft HQ (in Gilbert, Arizona) for 2 days of hands-on intensive training. The interactive group format will take you from beginner to expert in a short span of time. You'll receive personal one-on-one training, mastermind groups, Q and A sessions, and much more. And you'll also get a heavy dose of Infusionsoft culture as you spend time with dedicated team members who want nothing more than your success.</p>	<b>3 Blocks</b>
<p><b>Ask the Expert Session</b> (up to 1 hour*)</p> <p>You have questions...we have answers. This is your chance to ask one of our Infusionsoft experts anything (well, almost anything). The Q and A session is designed to give you the personalized answers you've been looking for.</p>	<b>1 Block</b>

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All services are non-refundable and expire within 60 days of purchase. 3

## Template Set-Up

A little work up-front can save you a lot of time, and our Template Set-Up Services all but eliminate that up-front work. Soon you'll be able to sit back and let Infusionsoft do the work for you.

SERVICE	BLOCKS
<p><b>Email Template Customization</b> (3 emails up to 1.5 hours*)</p> <p>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).</p>	<b>1 Block</b>
<p><b>Thank-You Page Customization</b> (1 page, up to 2.5 hours*)</p> <p>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.</p>	<b>2 Blocks</b>
<p><b>Order Form Customization</b> (1 form, up to 3.5 hours*)</p> <p>Extend the look and feel of your website into your order forms. 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.</p>	<b>3 Blocks</b>
<p><b>Shopping Cart Customization</b> (1 cart skin, up to 3.5 hours*)</p> <p>Your Infusionsoft shopping cart has a ton of useful backend features...but does it look like it belongs on your website? We'll help you customize the look and feel of your shopping cart to fit perfectly into your existing website.</p>	<b>3 Blocks</b>

## Existing Customers

Many Infusionsoft users continue to expand their knowledge base by taking advantage of our service packages. Existing Customers can get help with advanced import/data services or simply learn more about specific modules that can help their business grow.

SERVICE	BLOCKS
<p><b>Infusionsoft Marketing Automation Plan (M.A.P.)</b></p> <p>Marketing campaigns can be a little tricky to conceptualize. We'll help you map out a strategy and visualize exactly how your campaigns will execute within Infusionsoft. You'll receive a customized flowchart with all the details that you'll need to get a firm grip on your marketing processes.</p>	<b>2 Blocks</b>
<p><b>Infusionsoft Tune-Up Service</b> (up to 2 hours*)</p> <p>Do you feel like you aren't getting the most from your Infusionsoft app? Our experts will dig into your current strategy and processes with a comprehensive assessment of your application. Next, we'll make relevant, easy-to-implement suggestions that will help you increase efficiency and maximize your return on investment. And there won't be any vague concepts to leave you wondering what's next. You'll get a customized to-do list of exactly what you need to do.</p>	<b>2 Blocks</b>

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