

## Quick Overview of the Sample Content in Infusionsoft

### Customer Follow Up Sequences



#### **New Customer Welcome - 45 Day**

**Audience** - new customers

**Trigger** - as soon as they purchase from you

**Purpose** - build the relationship, overcome buyer's remorse, increase customer satisfaction, plant the seeds of referral, and lead to future sales

**Relationship To Other Sequences** - could put them in a value/education sequence at the end of the sequence. Simultaneously send cross sell, up-sell sequences

**Call To Action** - almost none, eventually lead to additional sales, and referrals

**Suggestion:** upon completion of this sequence, put customers into a long term customer nurturing sequence. This can be done by clicking the "Actions (Completion)" tab above and add to sequence.

#### **New Customer Welcome (6 months)**

**Audience** - new customers

**Trigger** - as soon as they purchase from you

**Purpose** - build the relationship, overcome buyer's remorse, increase customer satisfaction, plant the seeds of referral, and lead to future sales

**Relationship To Other Sequences** - could put them in a value/education sequence at the end of the sequence. Simultaneously send cross sell, up-sell sequences

**Call To Action** - almost none, eventually lead to additional sales, and referrals

#### **Lost Customer Sequence**

**Audience** - customers who have not purchased in 6 months

**Trigger** - send it at the 6 month mark of no action

**Purpose** - recapture customers you may have lost

**Relationship To Other Sequences** - follow up with educational or value sequence

**Call To Action** - get them to buy again

### Event Promo/Mgmt Sequences



#### **Event Registration Follow-Up**

**Audience** - registrants of events

**Purpose** - confirm the event registration and get the registrants to actually attend the event

**Trigger** - send as soon as someone signs up for an event

**Relationship To Other Sequences** - follows an event invitation sequence

**Call To Action** - come to event!

**\*Special Notes** - you will need to set the 'Finish Date' in the sequence to be the date of the event so the reminder emails get scheduled correctly. If registration happens closer than 2 weeks to the event, the 2-week reminder will be skipped.

#### **Event/Seminar Promotion**

**Audience** - everyone on your contact list

**Trigger** - begin the sequence 2 weeks before the event

**Purpose** - get people to attend an event

**Relationship To Other Sequences** - once they register, send them the event follow-up sequence

**Call To Action** - purchase tickets to the event

#### **Teleseminar/Webinar Promotion**

**Audience** - everyone on your contact list

**Trigger** - begin the sequence 2 weeks before the event

**Purpose** - get people to attend an event

**Relationship To Other Sequences** - once they register, send them the event follow-up sequence

**Call To Action** - purchase tickets to the event



### Prospect Follow Up Sequences

#### **Follow Up On Request For More Info**

**Audience** - New leads that ask for more info on your company

**Trigger** - Send it out immediately after being asked for more info

**Purpose** - lead conversion, promote your company and products/services

**Relationship To Other Sequences** - send this first, then follow up with promos or educational sequences

**Call To Action** - get prospects to investigate more about your company, lead to a sale

#### **Free Report Follow Up - Invite To Appt**

**Audience** - new prospects

**Trigger** - the prospect downloads a free report

**Purpose** - lead conversion. Get the lead to an appointment (ex: demo, talk to a salesperson, etc.) to learn more about the product or service

**Call To Action** - set up an appointment to learn more

**Relationship To Other Sequences** - If the lead does not respond to schedule an appointment, add them to another lead conversion sequence or a long-term prospect nurturing sequence

### Promos and Other Email Templates



#### **Miscellaneous**

Double Opt-In Template

Humble Apology Letter (If you haven't been following up)

Press Release

Promotion To Request Referrals

Testimonial Request Letter (Send To New/Existing Customers)

Letter Requesting Email Addresses

#### **Promotions - General**

Promotion for a FREE DVD (version 1)

Promotion for a FREE DVD (version 2 - Let us prove it)

Promotion for a FREE Gift (For scheduling an appointment)

Promotion for a FREE Gift (For Calling Us)

Promotion for a FREE Gift (For Coming In)

Promotion for a FREE REPORT (downloadable)

Invitation To A Demo of Your Product (See for yourself)

Invitation To A Demo of Your Product

#### **Monthly Promotions**

Monthly Promotions: January

Monthly Promotions: February

Monthly Promotions: March

Monthly Promotions: April

Monthly Promotions: May

Monthly Promotions: June

Monthly Promotions: July (USA)

Monthly Promotions: August

Monthly Promotions: September (USA)

Monthly Promotions: October

Monthly Promotions: November (USA)

Monthly Promotions: December