

Infusionsoft University OnDemand Course Agenda

Welcome

Regardless of how experienced you are in Infusionsoft, University is designed to take it to the next level. Within your OnDemand Learning Path, our experts will help you (or your employees) master the tools and understand the strategies that will drive your business forward. You'll cover the basics of how to make a good first impression on prospects, understand and segment your contact data, and create marketing campaigns with Campaign Builder.

Once you get the hang of the fundamentals, you'll amp up your automation skills by learning processes and understanding the advanced tools of Infusionsoft that will help you confidently implement strategies in your business.

Modules labeled OPTIONAL within your Learning Path are NOT a requirement to complete Infusionsoft University. These are simply additional education modules to support your style of learning!

100 Level Courses

100 LEVEL - Welcome to Infusionsoft University Course: Discover the Spirit of Small Business! You will hear from past Alumni on what brought them to Infusionsoft University as well as meet Sherrod Martin, your OnDemand trainer; He will walk you through what to expect on your Learning Path as a new student.

Time To Complete Required Modules: 5:25 minutes

MODULE
Spirit of Small Business [Video 2:11]
Why Attend University? [Video 1:50]
Welcome to Infusionsoft University [Video 1:24]

100 LEVEL – Infusionsoft University Pre-course: Spend time understanding how to get the most out of your time with Infusionsoft University OnDemand.

At the end of this training you will understand the following concepts:

- What is Infusionsoft?
- What is Infusionsoft University?
- How do i navigate around Infusionsoft?
- What help resources are available to me?
- What is a CRM? How do i organize my contacts?
- How do I configure my signature and profile?
- How do I add users to my application?
- How do i import a list of contacts?
- What is the Branding Center/ Drag and Drop Builder?
- How do I build and send an email /Email Broadcast?

Time To Complete Required Modules: 51:60 minutes

MODULE
Infusionsoft University Pre-Course

100 LEVEL – Lifecycle Marketing Course: Discover how to customize your sales and marketing strategy based on three stages of Lifecycle Marketing - Infusionsoft's proven framework for capturing leads, increasing sales and creating lifetime value for your customers.

At the end of this training you will understand the following concepts:

- Infusionsoft University History
- Making the Most of Infusionsoft University
- What is Lifecycle Marketing?
- What are the three phases of Lifecycle Marketing and how do they work?

Time To Complete Required Modules: 19:02 minutes

MODULE
Intro + Lifecycle Marketing

100 LEVEL – SBSM Assessment Course: The SBS Method is for Infusionsoft customers who are feeling confused about what to do next to automate their sales and marketing. The reality is that sales and marketing automation can be confusing. Infusionsoft is so powerful that it can be overwhelming to learn. The SBS Method changes all of that for our customers; it is a huge advantage for you, clarifying what you need to do to grow sales and save time in your business.

At the end of this training you will understand the following concepts:

- The SBS Method:
 - Identify Critical Gaps or Needs
 - Focus on your business, not tools
 - Take next steps confidently
- How to complete a SBSM Assessment for your business
- Discovery of a Single Tactic to focus on

Time To Complete Required Modules: 18:49 minutes

MODULE
SBSM Assessment

200 Level Courses

200 LEVEL – Campaign Builder Intro Course: The campaign builder is a visual, drag & drop interface that allows you to build a marketing and sales process from start to finish; including emails, landing pages and more. Your business may only require a single campaign to automate your entire marketing and sales automation strategy, or you may run many campaigns concurrently to support more complex automation needs.

At the end of this training you will understand the following concepts:

- The SBS Method:
 - Identify Critical Gaps or Needs
 - Focus on your business, not tools
 - Take next steps confidently
- How to complete a SBSM Assessment for your business
- Discovery of a Single Tactic to focus on

Time to Complete Required Modules: 53:34 minutes

MODULE
Campaign Builder Intro

200 LEVEL – Fill Your Funnel: First Impressions Are Valuable Course: When it comes to marketing and lead generation, it is very similar to dating. You have to court the lead and build a trusting relationship before trying to take things to the next level. Ease them into interacting with your business by asking the bare minimum to strike up a relationship. The most common way for a lead to show they trust your business online is by filling out a web form, so make it as painless as possible.

At the end of this training you will understand the following concepts:

- Web Forms vs. Landing Pages
 - Clearly define what each is and when to use each one

- Best Practices
 - Recommendations of assets we see that help conversion and effectiveness of the Web Form or Landing Page you are building
- Launching a Web Form
 - Learn how to launch a Web form
 - How to get the Web Form onto your website
- Infusionsoft Analytics on Web Forms and Landing Pages
- Advanced Uses

Time to Complete Required Modules: 56:13 minutes

MODULE
Fill Your Funnel

200 LEVEL – Campaign Builder Intermediate Skills Course: As humans, we have this natural urge to ask "Why?" We want to understand things around us. It connects us to the human experience. When it comes to creating automated experiences using Infusionsoft's campaign builder, they can definitely be challenging to understand. However, more often than not they do not HAVE to be difficult to grasp.

At the end of this training you will understand the following concepts:

- How to make changes to a campaign
- Campaign Branching
- Campaign Reporting
- How to modify a published campaign

Time to Complete Required Modules: 53:06 minutes

MODULE
Campaign Builder Intermediate Skills

200 LEVEL – Guess Who: Know Your List Course: The purpose of a tag is to segment your list. The more you know about your list, the better. Being able to pull a highly targeted segment from your database not only gives you the opportunity to deliver a very targeted message but also gives you a better chance that the recipient will take action. Simply, tags organize a lot of data into smaller chunks so you can quickly access it later.

At the end of this training you will understand the following concepts:

- Understand Tags and Custom Fields
 - How to use them
 - How to create them
 - How to organize them
- How to Organize and Import Data
- Search and Query database effectively
 - How to search effectively within your CRM

Time to Complete Required Modules: 30:10 minutes

MODULE
Guess Who: Know Your List

200 LEVEL – Lead Scoring: Finding Your Most Qualified Prospects Course: There a lot of nebulous definitions out there, but when we talk about a lead scoring system, it's simply a way to rank your leads so your sales reps can prioritize where they spend their time. This gives you a couple pretty amazing benefits in your business.

Benefits:

1. Lead scoring is will help get your sales and marketing teams synced up.
When your marketing team knows what makes a lead more likely to buy then they really narrow down their
2. Increase Sales because your reps are able to work with your hottest leads first

At the end of this training you will understand the following concepts:

- Who are my hot leads?
- Who are my hottest leads?
- Who should i speak to today?
 - These leads are most likely to purchase today
- How to configure your Lead Scoring mechanism within Infusionsoft

Time to Complete Required Modules: 20:55 minutes

MODULE
Lead Scoring

300 Level Courses

300 LEVEL – Campaign Builder Advanced Skills: Let’s Get Serious Course: Sending at least one email after a prospect gives you their name and email address is critical. But what about the second, third, or fourth email? Marketing studies show it takes roughly seven to 10 touches to convert someone to a customer. Most people forget to send more than one email. When that happens, we may be throwing away a possible sale. And that could translate into thousands of dollars we’re leaving on the table. So what do you do to make sure that doesn’t happen? You need to automate your email nurture sequence.

At the end of this training you will understand the following concepts:

- Prospect Nurture Strategies
- Jumping from one campaign to another
- Abandoned Cart Strategies
- Campaign Timers
- Campaign Actions Menu

Time to Complete Required Modules: 54:17 minutes

MODULE
Campaign Builder Advanced Skills

300 LEVEL – Lead Source Tracking: Big Brother for Small Business Course: Sending at least one email after a prospect gives you their name and email address is critical. But what about the second, third, or fourth email? Marketing studies show it takes roughly seven to 10 touches to convert someone to a customer. Most people forget to send more than one email. When that happens, we may be throwing away a possible sale. And that could translate into thousands of dollars we're leaving on the table. So what do you do to make sure that doesn't happen? You need to automate your email nurture sequence.

At the end of this training you will understand the following concepts:

- How Infusionsoft Analytics Works
- Installing Infusionsoft Analytics on Web Pages & Wordpress
- Lead Source Tracking
- Lead Source Reporting and Analytics

Time to Complete Required Modules: 22:33 minutes

MODULE
Lead Source Tracking: Big Brother For Small Business

300 LEVEL – Infusionsoft University Final Exam: This is an OPTIONAL Exam to test your knowledge of Infusionsoft. This exam will take you through all of your education and ensure that you feel confident post completion. The exam is comprised of 60+ questions to check your skills!

Time to Complete Required Modules: 60 minutes