

“Done for You” Kickstart Services

One-on-one coaching to get you up and running fast.

	Gold	Platinum
Price	\$1,999	\$2,999
Personal Consulting Services Get access to an experienced Success Coach for 30 days, during which you'll get one-on-one assistance with what matters most to you—whether it's learning marketing best practices, setting up your online storefront, training your team or anything in between.	4 Hours	4 Hours
“Done for You” Campaign Set-Up Your Success Coach will help you to determine which campaigns will have the biggest impact on your business and then set them up on your behalf, including a campaign map, landing pages, forms and emails with copy tailored to your business. Afterwards, your coach will show you how to edit your campaign copy and view reports.	2 Campaigns	3 Campaigns
“Done for You” Basic Set-Up Our team will configure your Infusionsoft dashboard with reports, widgets and other useful stats so you can see what's working from day one. We'll also set up your segmentation tags, user permissions and preferences so you can focus on the big picture.	✓	✓
Data Import Services Infusionsoft's data experts will help transition your data from another source and organize it just the way you want it, ensuring you don't lose time or critical customer information.	Contacts Only	Full Data Import
Long-Term Strategic Guidance Your Success Coach will provide a personal game plan for your continued success as well as a training plan tailored to your needs.	✓	✓

For more information, call Infusionsoft now at 1.866.800.0004.

Kickstart Services: Gold Package (\$1,999)



Personal Consulting Services

Get access to an experienced Success Coach for 30 days, during which you'll get four (4) hours of one-on-one assistance with what matters most to you—whether it's learning marketing best practices, setting up your online storefront, training your team or anything in between. During your 30-day consulting window, you can email or call your Success Coach at any time.



“Done for You” Campaign Set-Up

Together, you and your Success Coach will discuss your goals and determine which two (2) pre-configured campaigns will have the biggest impact on your business. Your coach will then set up those campaigns on your behalf (including landing pages, forms and emails with semi-personalized copy) and show you how to edit your campaign and view reports.

What's included:

- Two pre-configured campaigns (campaign map, sequences, landing pages, forms and emails)
- Semi-personalized copy within your campaign
- Training on how to edit campaign copy and view campaign reports

What's NOT included:

- Unique campaign development, personalized copywriting or design services

For more information, call Infusionsoft now at 1.866.800.0004.



Data Import Services

Transitioning your data from one system to another can be a process full of headaches and hiccups—but not with Infusionsoft. Our data experts will help seamlessly import your contacts from another source and organize it just the way you want it, ensuring you don't lose time or critical customer information.

What's included:

- Data import for up to five contact / company lists from a CSV file (max 10,000 contacts)
- Set up of custom contact fields (up to 10 fields)
- Set up of tags for list segmentation (up to 5 tags)
- Linking contact records to company records (if needed)

What's NOT included:

- Advanced imports (e.g. notes, histories, orders, opportunities, affiliates, etc.)
- Exporting data from your current platform
- Data clean up services



“Done for You” Basic Set-Up

Once your campaigns are in place, our team will configure your Infusionsoft dashboard with reports, widgets and other useful stats so you can see what's working from day one. We'll also set up your segmentation tags, user permissions and preferences so you can focus on the big picture.

What's included:

- Dashboard configuration with key reports and widgets
- Tag creation for contact segmentation and reporting
- User permission and preference configuration



Long-Term Strategic Guidance

At Infusionsoft, we're dedicated to your long-term success. At the end of your 30-day consulting engagement, your Success Coach will provide recommendations for your continued success and a training plan tailored to your needs. He or she will also introduce you to your dedicated Account Manager who will ensure your ongoing success.

What's included:

- A personalized game plan and training plan for the next 3 to 6 months
- Introduction to your dedicated Account Manager

Kickstart Services: Platinum Package (\$2,999)



Personal Consulting Services

Get access to an experienced Success Coach for 30 days, during which you'll get four (4) hours of one-on-one assistance with what matters most to you—whether it's learning marketing best practices, setting up your online storefront, training your team or anything in between. During your 30-day consulting window, you can email or call your Success Coach at any time.



“Done for You” Campaign Set-Up

Together, you and your Success Coach will discuss your goals and determine which three (3) pre-configured campaigns will have the biggest impact on your business. Your coach will then set up those campaigns on your behalf (including landing pages, forms and emails with semi-personalized copy) and show you how to edit your campaign and view reports.

What's included:

- Three pre-configured campaigns (campaign map, sequences, landing pages, forms and emails)
- Semi-personalized copy within your campaign
- Training on how to edit campaign copy and view campaign reports

What's NOT included:

- Unique campaign development, personalized copywriting or design services

For more information, call Infusionsoft now at 1.866.800.0004.



Full Data Import Services

Transitioning your data from one system to another can be a process full of headaches and hiccups-but not with Infusionsoft. Our data experts will help seamlessly import your customer, marketing and sales data from another source and organize it just the way you want it, ensuring you don't lose time or critical customer information.

What's included:

- Contact, company, affiliate and opportunity record import from a CSV file
- Notes/email history import from a CSV file
- Product/subscription import from a CSV file
- Order history and recurring order import from a CSV file
- Task/appointment import from a CSV file
- Set up of custom contact fields (up to 10 fields)
- Set up of tags for list segmentation (up to 5 tags)
- Linking contact records to company records (if needed)

What's NOT included:

- Data export from your current platform
- Data clean up services



“Done for You” Basic Set-Up

Once your campaigns are in place, our team will configure your Infusionsoft dashboard with reports, widgets and other useful stats so you can see what's working from day one. We'll also set up your segmentation tags, user permissions and preferences so you can focus on the big picture.

What's included:

- Dashboard configuration with key reports and widgets
- Tag creation for contact segmentation and reporting
- User permission and preference configuration



Long-Term Strategic Guidance

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What's included:

- A personalized game plan and training plan for the next 3 to 6 months
- Introduction to your dedicated Account Manager