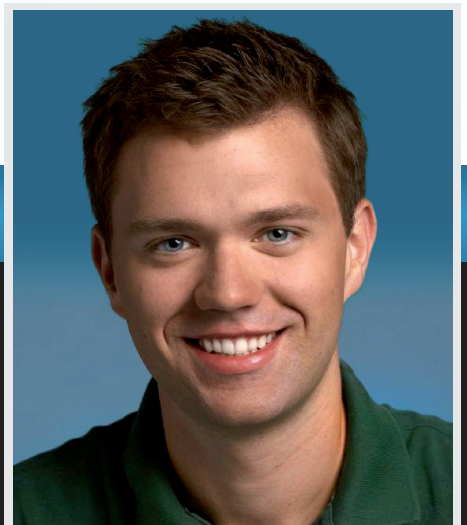# 5 INDICATORS
That You're Ready For
INFUSIONSOFT

And What To Do If You're Not!

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automation • marketing • technology

5 Indicators That You're Ready For Infusionsoft

Patrick Conley from [Automation Heroes](#)

Congratulations! Your business is up and running and now you're looking for the best software, systems and strategies to get your name out there in a big way and sell your offers to clients with integrity.

If you downloaded this report then it's pretty likely that you're considering investing in the Marketing Automation and e-commerce software [Infusionsoft](#) and while we *love* Infusionsoft, it's not right for every business at every stage.

Consider this, if you signed a lease agreement for a Ferrari the day you got a driver's license without any idea how you'd be able to afford the payments, gas, insurance or parking you'd be considered a fool. Sure, it may be the best in the world (and that's how we feel about Infusionsoft) but getting ahead of yourself will only lead to frustration and rob you of the enjoyment of finally being behind the wheel of that Ferrari.

It's okay to work up to Infusionsoft and we want to help you know when the time is right and how to strategically prepare your business for the integration.

We love Infusionsoft but there are 3 good reasons you should *NOT* invest until your business is ready.

#1 — It's an investment of money

If your business has not grown to the level of needing Infusionsoft then you'll end up paying out service fees each month and growing more frustrated if you don't see returns. It's easy to resent the software if your business isn't ready to turn your leads into customers and your customers into repeat customers — so instead you'll only be worrying about the cash outflow.

#2 — It's an investment of time

Getting set up in Infusionsoft takes time and if you're unable to make that investment then you won't appreciate all that the software can do for your business. If you have too many irons in the fire then it's likely Infusionsoft integration won't be your top priority, making you regret the expense.

#3 — It's an investment of focus

It's enough of a challenge to integrate all of these facets of your business into new software - don't set your business up for overwhelm by trying to create and integrate campaigns, segmented lists, affiliate services and products all from scratch at the same time. We'll show you how to get ready now so when your business is ready the transition will be smooth and graceful.

Ready for the 5 Indicators?

After each chapter you'll have resources, assignments and guidelines to help you reach these milestones quickly!

1. Your business has an active leads list of at least 1,000 individuals

Let's break this down….

a) Your business has these leads, not just your personal rolodex or cell phone contacts but 1,000 people have opted-in to hear more about your business.

b) The leads are active, meaning they are opening emails and engaged. If you haven't contacted a list of 10,000 in 5 years, you don't have a list of 10,000. Re-engage and make sure you have at least 1,000.

c) While your list may include businesses, depending on your industry, you should be identifying individuals within those businesses to contact. Also if you find you have some people who opted-in many times then know you probably do not have 1,000 total.

Why is this important?

Well, in the experience of many business coaches and online marketing experts, 1,000 subscribers is the first tipping point to making significant strides in the growth of your business. It validates that your offer to the market is making people notice you and you're pulling them into a closer relationship.

Infusionsoft excels at leveraging relationship marketing so, quite simply, establishing relationships is the first step. Another reason is practicality. Infusionsoft enables some very sophisticated segmentation so you can send targeted messages to your list. It's difficult to usefully segment a list of 17 people.

There is one key factor however that may help you to be successful, even if your list is much smaller than 1,000 people. If you have a high price point service, then you need to sell much fewer units to see a positive ROI on Infusionsoft. We've worked with clients who started with a very small list, but use Infusionsoft as a tool for qualifying new prospects more than a "mass-mailer" approach. If this sounds like your business model, contact us to see if Infusionsoft may be a good fit even with a smaller list size.

So, what if I don't have this in my business?

Your assignment is list building! It's time to get your name out there and share what you offer with your ideal clients in a way that draws them into learning more about you. Remember that you are building relationships and testing out your pitch. Asking people to show interest by opting-in is great practice for selling. After all, if you have a free offer on your site and people are not interested, it's going to be much harder to sell a paid product.

Resources
[Authentic List Building by Derek Fredrickson](#) – This program is fantastic for building a list of true fans for your offering. So many "list building" courses rely on spam tactics that make you feel like a sleaze-ball. However, Derek and Fabienne have put together a great program that shows you how to create amazing magnets for leads that are truly interested in what you're providing!

2. Your list can be segmented by actions and interest

Let's break this down....

a) Once again it has to be *your* list, not one that was borrowed, transferred or stolen.

b) You know enough about the your list that you can divide them into groups based on their behaviors (even if you're not doing it currently).

c) You can identify some of the most common tags and segment your list accordingly.

Why is this important?
Let's say that you want to offer special holiday pricing on a product you offer and blast out that offering to your entire list. Including everyone who paid full price last week – Ooops! Wouldn't it be smarter to send this special offer to only the people who have not already purchased?

List segmentation is just like old school market analysis except instead of knowing that there are 3 million 18-25 year olds watching Survivor who might watch your commercial, you get to craft and send a message to *only* the 18-25 year olds who like Survivor and have already expressed interest in your products with proper list segmentation.

Some of the popular list segments we like to use are:

Buyers / non buyers	Problem customers	Social media campaigns
Affiliates / partners	Attended event	Requested refund
Lead sources	Filled out web form	Clicked Link
Regional / location	Pains / Goals	Repeat customer

So, what if I don't have this in my business?
It may be time to clean up your existing CRM with tags that indicate a lead's location, previous purchases or interests.

Consider filtering your list through a survey to find out their biggest concerns, needs, requests or pain points. Even if you choose not to send it until you convert to Infusionsoft write out the 5-8 questions that would most effectively help you segment your list.

Resources:
If you haven't already checked out the amazing demo that Infusionsoft provides, you can do so by clicking here. These days having a rock-solid CRM system that allows list segmentation is so powerful. As a homework assignment, make a list of all of the different ways you could potentially segment your audience (psychographic, demographic, goals, etc.) so that you'll already have some great ideas of what tags to apply when you're ready to invest in Infusionsoft.

3. You have at least two (and preferably more) products or services currently being offered

Let's break this down….

a) These offers should be contained within your business – not as bonuses or solely as collaborations with other companies.

b) You've been in business for a while and have more than one offer to your audience and are adding more as your business develops.

c) These offers are available for purchase *now* – not in 6 months when they get finished or seem "ready".

Why is this important?
Well, to be blunt, you shouldn't be purchasing marketing automation software if you don't have anything to market! Additionally, some of the campaigns we're going to show you include a good amount of cross-selling, up-selling and down-selling (it's okay if you don't know what that means yet). With just one offer you'll miss out on much of the automated selling power of Infusionsoft.

It's also important that these are offers that you have available to your audience now – every busy entrepreneur has a slew of ideas and some half-baked products that aren't ready yet. It doesn't have to be perfect (and it likely *never* will be perfect) but you need to be ready to sell it!

So, what if I don't have this in my business?
Just complete and offer your products and services now! Focus on building a MBP – Minimum Buyable Product. It takes some effort to get over the perfection paralysis and launch an offer but you'll learn so much along the way that it'll make up for anything that isn't 100% perfected quite yet.

So finish the product or service offer, write the sales emails and pages, offer details and sell it!

Resources:

Ready to complete your next program or offer? Get implementation support from my good friend and systems expert Kelly Azevedo. Kelly is a ninja when it comes to getting things done in any project. She's provided a few cool videos to help get you started. You can check them out totally free here:

[How to Launch Your Offer](#)

[How to Set Up a Group Coaching Program](#)

[How to Create Systems, Hire the Right Help, and Grow Your Business](#)

4. You have regular sales of those products and services

Let's break this down….

  a) It's not enough to have 47 products in your store if you haven't made any sales yet.

  b) While a few offers may be new, most of them have sold in the past and continue to sell.

  c) Scholarship clients and free offers don't count for this example.

Why is this important?

It's easy to get distracted by setting up the perfect shopping cart and sales pages of all the products or services you provide and ignore the fact that without *sales* you're not going to be sustainable in business.

Infusionsoft will help you sell more by automating messages that you know click with the leads that are interested. But the best software in the world isn't a substitution for understanding sales fundamentals and having the right offer and price point.

The only new thing Infusionsoft will tell you is that people are not interested in buying – which you already know if sales are not coming in yet.

So, what if I don't have this in my business?

If sales are not where they need to be, we recommend focusing on conversions before changing up the delivery system. If your current products and services are not appealing to the market take the time to get to know your leads and develop a relationship so you understand their needs better. You may need to create new offers or revise your existing ones but ideally this should be done before moving into Infusionsoft.

Resources:
Influence: The Psychology of Persuasion by Robert B. Cialdini – This book is amazing. Robert breaks down the psychological nuts and bolts behind every decision that we make, especially pertinent to deciding whether or not to purchase a product. Read this book front-to-back, and check the principals against your current sales funnel. Does your current copy and messaging uphold the principals of consistency, reciprocity, and social proof? If not, use this book to re-work your sales process.

5. You're already spending $200/month or more on marketing software services.

Let's break this down….

a) You're already investing in your business.

b) You're comfortable using marketing software but may be cobbling together several services.

c) The investments you're making now can be replaced by using Infusionsoft alone.

Why is this important?
Most people don't realize how much their current expenditures add up – it's $20 here, $69 there and without adding it all up we don't realize that one comprehensive solution may actually be cheaper.

Exercise
Add up your recurring service fees. Would your stress level be reduced if you could accomplish all of this "under one roof"?

Service	Monthly Cost	Yearly Cost
Mailchimp		
Aweber		
Constant Contact		
iContact		
1ShoppingCart		
Survey Monkey		
WuFoo Forms		

More importantly than the cost alone, you don't have to spend as much time transferring data, cross-checking systems, and manually working on your list when you have Infusionsoft. So even if you're only currently spending $150/month and 10+ hours managing the details you'll likely still come out ahead by simplifying your business with Infusionsoft.

So, what if I don't have this in my business?

If you're not investing in any software then you should start learning the ins and outs of marketing management with the basics. It's likely that you've not yet reached the other tipping points we mentioned so as you grow your list, create offers and make more sales you'll experience a taste of what Infusionsoft can do for your business.

A Final Note…

It's easy to get frustrated, we understand – especially with so many experts telling you how Infusionsoft improved their business. But understand that the software alone doesn't create success; it only accelerates it. It's important to have your business up and running at a basic level before you supercharge it.

Understanding how campaigns, automation rules and email marketing works is crucial and foundational to having success with Infusionsoft.

It would be easy for us to suggest investing today but if your business isn't ready then you won't truly appreciate it and won't get value from the software. Of course, there are always exceptions to these guidelines so if you think you really are ready, let's talk!

Next Steps

Congrats! The very fact that you picked up this guide and made it this far tells me that you're committed to your business' growth and development.

Remember that these are just progress indicators and you should be growing your business in these areas consistently.

Whether you think you're ready for Infusionsoft now, or need some support getting there, let's have a quick conversation so you know the type of assistance available to your business today.

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Index of Terms

Don't quite have the grasp of the terms yet? Never fear, we're happy to explain. Be on the lookout for info in the newsletter on these terms:

Campaign – This is an all encompassing term that includes every touch point from a lead "opting-in" to receive marketing messages from you, up to making the initial sale. Typically a campaign will include a lot of 'value-giving' emails (and possibly other forms of media) that build trust with a prospect and move them towards being ready to buy something from you.

Follow-Up Sequence – A follow-up sequence is typically a chain of time-delayed emails that are sent to a lead or customer after they have taken a particular action, such as opting-in to a web form.

Opt-In – An opt-in is a confirmation from a lead that they are allowing you to send them marketing messages. Typically this is done in online marketing with a "Web Form" in which the website lead trades their information (typically name & email address) for some item of value that you are providing them (e-book, newsletter, video, etc.).

Single Opt-In – A single opt-in occurs when a lead fills out information to receive marketing messages from you. It is an agreement that it's okay for you to send them information.

Double Opt-In – A double opt-in builds upon a single opt-in by sending a confirmation email to the lead asking for the lead to click a link that verifies the email provided is correct and it's okay to send marketing information to the email address. Typically a double opt-in will reduce the number of bounces and spam complaints you receive because the lead truly wants to receive more information from you.

Web Form – A web form is used to collect information from visitors to your website. Typically there is an exchange that takes place where visitors trade their personal information for something of value to them (informational ebook, DVDs, videos, etc.).

Tagging – One of the most powerful functions of Infusionsoft is its tagging abilities. Tags are placed on contacts in your database, typically set automatically, based on rules that you set up. For example if a lead buys a product from you, you can apply a tag to denote them as a "buyer". The power comes when you tag nearly every action that a lead takes in your business. For example, suppose a website visitor comes to a particular page and opts-in to your funnel. Apply a tag to note which opt-in brought the lead into your funnel. Next, the lead signs up for a webinar that you are hosting. Tag them as registered for the webinar. But what if during the webinar they don't take you up on your sales offer? Tag them as didn't purchase from webinar. Now since this has been happening automatically in Infusionsoft for you (you just set the rules, and it takes care of the rest), you have a list of specific leads to follow up with (people tagged as "registered for webinar" AND "didn't purchase").

Segmentation – Segmentation is the ability to split off chunks of your email list based on some data that you have collected. For example, if you are running a local live event in Los Angeles, you might not want to blast updates about the event to your entire list – just those living around the Los Angeles area! The more data you collect from your leads and customers, the more chances you have to intelligently segment your list.

CRM – Customer Relationship Management (CRM) is your solution for keeping all of the data about your leads, prospects, and customers in one place and well organized. Infusionsoft offers extensive built-in 'fields' of data you can collect for each contact in your database, as well as 100 custom fields for extra information.

Cross-selling – Cross-selling refers to making an offer on a complimentary product after a customer has very recently purchased a product from you. Typically cross-sell offers are similar in value/price to the original offer. Think "would you like fries with that burger?".

Up-selling – Up-selling is similar to cross-selling except it usually involves offering a big upgrade to the product your customer just bought. Think "would you like to supersize that order?". A common way this is done in internet marketing is to offer a continuity membership program to a customer who just bought an e-book from you.

Down-selling – Down-selling is similar to up-selling except that it usually involves offering a product that is less costly/valuable than the previous offer. Down-sells typically occur after a customer has chosen not to purchase an up-sell. For example, suppose your original offer is an e-book. Then after your customer buys, your up-sell is a premium priced membership program. If they turn down your up-sell, you offer them a down-sell offer of a lower priced version of the membership program that may be less extensive but more affordable for your new customer.