

# INFUSEDREPORT

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## Seven Infusionsoft Secrets they won't tell you!

By Kyle Leavitt

Thanks for requesting my free report, "Seven Infusionsoft Secrets They Won't Tell You". If you're an existing or future Infusionsoft user then this report is a MUST read.

Before you get into the details of this report, please allow me to introduce myself. My name is Kyle Leavitt and I worked at Infusionsoft for three years, most recently as Director of Sales.

Given the combination of my background and the title of this report, you might be thinking that you've finally found a person to "expose" Infusionsoft. Well, I'm sorry to disappoint you, but if you're looking for an Infusionsoft "bash session" then you've come to the wrong place. The fact is, I love Infusionsoft! The people are great, the software is tremendous, and working there was the best career decision I ever made.

HOWEVER...

I would be lying if I told you that I didn't have some "insider" knowledge of Infusionsoft that you could benefit

from. Combining our total experience at Infused Systems, we've been involved with Infusionsoft practically since the beginning and we've picked up several 'gems' of information along the way.

I'm going to share with you seven Infusionsoft secrets that you won't find in any Infusionsoft marketing literature, community forums, help resources, and certainly not on the phone with an Infusionsoft representative---and I'm going to do it in a manner that you're probably not used to: I'm going to tell it like it is!

That's right - no confusing techno jargon, no competitive analysis, and most importantly, NO sales gimmicks. Just the pure and unadulterated truth! I also guarantee that at least one of these secrets will change the way you think about, implement, and use Infusionsoft.

So with that, enjoy!

You would never know these seven secrets unless you had been there yourself...

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## Secret #1: Infusionsoft is NOT an "all-in-one" system.

For a long time it tried to be. Then, after several years of attempting to develop the product as wide and as deep as possible, Infusionsoft discovered something that ALL software companies come to know: it's impossible to be everything to everyone. Trying to build something that appeals to everyone will result in something that is mediocre at everything and not great at anything. Plus, it's just too difficult and too expensive to develop and support.

That's why CRM (Customer Relationship Management) software stinks and why Infusionsoft is getting out of the CRM game and going back to their roots. After all, Infusionsoft was born out of a hardcore direct-response marketing environment. Marketing (specifically, follow-up marketing) is what they do best. They've taken CRM out of their vocabulary, rebranded their logo to include the words "Automated Follow-up Marketing" instead of CRM, and have even gone as far as launching an anti-CRM marketing campaign.

All of these are positive changes in my estimation. However, if you're not careful you could still end up getting the impression that Infusionsoft is the 'end-all-be-all' for your business. Despite all the repositioning Infusionsoft has done, you may still stumble upon the lingering remnants of "comprehensive, all-in-one system for small businesses" - words that were previously used to describe Infusionsoft.

So, here's my word of advice---if you're buying Infusionsoft for any reason OTHER THAN "Automated Follow-up Marketing" then you should do one of two things: 1) Learn the importance of follow-up marketing for your business and buy Infusionsoft for THAT reason, or 2) Really dig in and do the research before you assume that it's going to do everything you want or need outside of the marketing umbrella (just because your "old" system does it doesn't guarantee that Infusionsoft will). Personally, I recommend the first option.

## Secret #2: You'll need a web guru in order to properly leverage Infusionsoft.

If you really want to take advantage of Infusionsoft's full functionality you'll need a web guru - at the very least someone who knows html. The reason for this is simple: Infusionsoft gives you the 'engine', but it's up to you to

integrate that engine into your website and other important online systems.

As you've probably already discovered, setting things up in Infusionsoft is one thing, getting them on to your website is another, and configuring them to look and function the way you want is yet another.

In addition to integrating Infusionsoft with your website, you're likely to need some help implementing design templates in Infusionsoft for emails, letters, faxes, etc (that is, unless you're comfortable with the ultra-basic designs that can be accomplished with the supplied WSIWYG html editor). Without professional help on your templates, you're likely to come off looking a bit tacky - something that could put a big dent in your reputation and make it harder for customers to trust you!

The moral of the story is simple: if you don't have one already, get a web guru - preferably someone with Infusionsoft experience (otherwise you'll end up paying that person extra to learn Infusionsoft). It may require a small upfront or ongoing investment but it will reduce your level of frustration in the short run and return monetary dividends down the road.

## Secret #3: Infusionsoft won't generate more leads for you.

There is a perception out there in the Infusionsoft community (especially among prospects) that Infusionsoft is the long-awaited answer to the proverbial lead flow problem. I'm going to put this notion to rest - right here and right now! It's NOT going to generate more leads for you. Period. It's not going to magically make more people visit your website. It's not going to make more people respond to your advertisements. And it's certainly not going to make more people think that your product or service is worth buying!

If implemented properly, what Infusionsoft WILL do is convert more of your leads. And the way it does this is by following up with your list of prospects and customers automatically, consistently, and over an extended period of time.

So do yourself a favor: before you buy Infusionsoft, make sure that you've got a real business! You don't have to be making millions, but you should know that there's a level of demand for your products and services. While not mandatory, it's also nice to have an existing list of

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prospects and customers - that way you can sic Infusionsoft on them and start getting immediate ROI. Otherwise, who are you going to follow up with? Who are you going to convert? The primary value of Infusionsoft is significantly diminished if you can't take advantage of its nurturing engine. End of story.

## **Secret #4: The Infusionsoft API (and a programmer who can use it) is the key to freedom.**

Every software product has limitations. Have you ever wished that Infusionsoft could just do X, Y, or Z? How much easier that would make your life! How much time and hassle that would save you! How much revenue that would add to your bottom line!

Well, have I got news for you! You probably CAN do it, and the Infusionsoft API is your key to freedom. Granted, you'll need a programmer who can understand your business objectives and is capable of developing within the framework of XML-RPC (a remote procedure call protocol which uses XML to encode its calls and HTTP as a transport mechanism). But once you've got the right person and the right budget, there are very few things you CAN'T do.

The Infusionsoft API has become a sort of knee-jerk answer to questions that stretch the limits of Infusionsoft's capabilities. If it's not something Infusionsoft can do right out of the box, chances are they're going to tell you to just use the Infusionsoft API.

Proceed with caution! It might sound easy to do. It may seem like every programmer should be able to use the Infusionsoft API. You may even think it's not going to be that big of a deal. Before you move forward with it, just be sure that your programmer has a clear understanding of your business requirements and that you have a commitment on the price and timeline required to accomplish the work.

Moreover, I would very strongly recommend using someone who has Infusionsoft experience. The Infusionsoft API doesn't come with step-by-step instructions, and you (and your programmer) should avoid making assumptions about how it works and what it can do. Without the right understanding of things you might end up negotiating a very expensive dead-end!

## **Secret #5: The truth about email deliverability.**

Email marketing is hotter than hot, and it's going to continue to be for a long, long time. You'd better have an email marketing strategy, and making sure that your emails are getting through to intended recipients should be a fundamental part of that strategy. Is Infusionsoft the right email platform for you? I believe so, and I'll tell you why in a moment. Before doing so, however, there are a few considerations that are important to understand about Infusionsoft's email system.

First, every Infusionsoft application comes with a standard email package. The standard package allows you to send up to 150,000 emails per month (quite a bit by most people's standards). It also lets you send to both single opt-in and double opt-in subscribers - a benefit you won't enjoy with most other email marketing platforms. With the standard package you can even track open rates, click through rates, and employ 'trackable' email links (a very powerful feature that's unique to Infusionsoft). So you're set, right? No.

The problem with the standard package is that you share an IP address with multiple other businesses, each of whose email practices can have a negative impact on your own email reputation! For example, if one of your IP neighbors gets caught spamming or sending broadcast emails to people who didn't really request information, your IP address could get 'blacklisted' and your email delivery could suffer significantly. To their credit, Infusionsoft has a team that monitors and resolve these situations, but unfortunately if your email reputation is even temporarily damaged it could mean thousands of dollars to your bottom line!

That's why I recommend to every Infusionsoft user one of their two upgraded email packages: Deluxe or Platinum. Deluxe gives you a limit of 500K emails per month, comes with Habeas certification, and offers upgraded reporting features. Platinum is even more robust, allowing you to send 1.5MM emails per month. Other than that, it shares pretty much the same features as Deluxe, with the exception that Platinum boasts a dedicated IP address.

So which is right for you? Despite the fact that Platinum email is the one with a dedicated IP address, I still recommend Deluxe for most small businesses. In most cases, email deliverability for Deluxe is every bit as good as Platinum (sometimes better), plus it's easier to setup and it's more cost effective. But what about the shared IP

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address problem? The reason that the Deluxe shared IP doesn't cause the same problem as the standard shared IP is because every Deluxe customer has to go through a rigorous Habeas certification process, so you can rest assured you're not shacking up with a host of email villains.

To sum up, unless you're sending more than 500,000 emails per month, Deluxe is the way to go. You'll get top-notch email deliverability, enhanced reporting, and you'll save a few bucks in the process. The investment in Infusionsoft's Habeas certified email is well worth it (especially when compared with email prices for other certified vendors) and it will mean that more of your emails getting to inboxes and more money hitting your bottom line!

## **Secret #6: There is a significant difference between 'setup' and 'implementation'.**

Please understand the difference between 'setup' and 'implementation'. When you purchase Infusionsoft (the software) directly from Infusionsoft (the company), you're going to receive a 'setup' package as a part of the deal. This does NOT mean that they're going to implement the system for you. You see, quite honestly, Infusionsoft can't fully implement their software for you, because a full implementation entails a much wider variety of services than what they offer.

A true implementation involves everything from creating follow-up content to "infusing" your website to learning, organizing, and setting up Infusionsoft. In other words, you'll need to be willing to dedicate some serious time to it upfront if you want to have a speedy and successful implementation. For most businesses, Infusionsoft's 'Basic Setup' (the one that comes with the software by default) is a guidance mechanism. You'll get some direction regarding what you need to do next and an idea of how to accomplish it. You won't get a person holding your hand through the entire process, and you won't get somebody to actually do the work for you.

You should safely plan on thirty to sixty days of fairly involved work in order to have the system fully 'implemented' in your business. And if you need anything more than somebody telling you what to do next, you should seriously consider hiring an ICC (Infusionsoft Certified Consultant) or some other form of help to contribute to and/or head up the implementation...which leads me directly to secret #7.

## **Secret #7: Infusionsoft is a COMMUNITY - you don't have to do it alone!**

While Infusionsoft is a sales organization and they would certainly welcome the opportunity to help you (and sell you) in every area you need help, the truth is that they're growing extremely fast and with rapid growth come certain challenges. During the three years that I was there, our sales grew by 917% over a three year period!

With that kind of growth, it becomes almost impossible to service the needs of your customers as directly and responsively as you want. I know the people at Infusionsoft personally, and I can PROMISE you that they care about providing good service. They refuse to outsource their customer service (as most other software companies do) and they have always managed to keep their hold times in support very reasonable (you can usually get through to a real person in a few minutes or less).

Nevertheless, when you've got a dynamite product and you're growing so fast, there's only so much you can do. This is why Infusionsoft launched their ICC (Infusionsoft Certified Consultant) program in late 2007 and is putting such a large emphasis on building it out. Additionally, they're developing a nice online community and actively seeking partners that can help them "fill in the gaps" in other needed areas.

So why am I telling you all of this? Because you need to know that when you need something, ANYTHING, you don't HAVE to call Infusionsoft. There are other options. There are other people who know Infusionsoft just as well (and often better) than anyone you might speak with at Infusionsoft. Furthermore, these people can help you in more ways than just providing a handful of services geared toward your Infusionsoft application. You can get your entire range of needs met from building a website to writing content to fully implementing Infusionsoft's powerful marketing and follow up technology---all in ONE PLACE: the Infusionsoft community.

So who and what make up the community? Well, there is the Infusionsoft Online Community, a place you'll find a variety of information including other Infusionsoft customers and prospects discussing a range of different topics. However, the community I'm more directly referring to is the ICC (Infusionsoft Certified Consultant) & partner community. THIS is the community that will be able to provide the level of expertise and service you're really looking for. Take advantage of the resources that

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are available to you and you'll be a much happier Infusionsoft user!

## Summary

**Secret #1: Infusionsoft is NOT an "all-in-one" system.**

**Secret #2: You'll need a web guru in order to properly leverage Infusionsoft.**

**Secret #3: Infusionsoft won't generate more leads for you.**

**Secret #4: The Infusionsoft API (and a programmer who can use it) is the key to freedom.**

**Secret #5: The truth about email deliverability.**

**Secret #6: There is a significant difference between 'setup' and 'implementation'.**

**Secret #7: Infusionsoft is a community - you don't have to do it alone!**

By sharing these secrets with you, my hope is that you'll be able to save some time and money as well as formulate a clear vision of how you can move forward successfully as an existing or future Infusionsoft user. Granted, these seven secrets are only scratching the surface of what we at Infused Systems know about Infusionsoft (the company) and Infusionsoft (the software), but this report should serve as a great starting point for you.

In closing, I'd like to leave you with a final word about Infusionsoft. In case you aren't already aware, please know that Infusionsoft is a revolutionary tool, worth its weight in gold and more (I guess that comparison isn't extremely relevant when you're talking about cyber-software, but you get the idea). Infusionsoft can literally save you hundreds of thousands of dollars and make you hundreds of thousands more. It's likely to change the way you do business! So do yourself a favor and get educated about the benefits of 'Automated Follow-up Marketing' - something that every small business desperately needs. You'll be really glad you did.

Thanks again for reading my free report and I hope you've gleaned a few 'gold nuggets' in the process. I wish you the best of success in your small business adventure!

Should you need some expert advice or some other kind of help along the way, you can visit our website at [www.infusedsystems.com](http://www.infusedsystems.com) and learn more about a variety of products and services we offer to make life easier for existing and future Infusionsoft users! Or, as always, you can feel free to call us at 866.551.4937.

## About Infused Systems

Founded in April 2008, Infused Systems' mission is to make life easier for existing and future Infusionsoft users. As an Infusionsoft Certified Consultant (ICC), Infused Systems offers products and services tailored expressly to the needs of Infusionsoft customers and prospects. With over seven years combined experience working in key positions at Infusionsoft, the Infused Systems team has a unique understanding of Infusionsoft as well as the marketing and sales principles that have made the software so successful. Learn more about Infused Systems online at [www.infusedsystems.com](http://www.infusedsystems.com) or by calling 866.551.4937.