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NinjaTricks

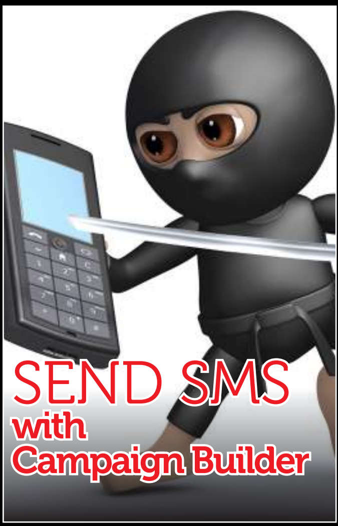
May 2014 - Issue 1

Infusionsoft Campaign Builder Issue

Business Acceleration Vacation

Win a Business Acceleration Vacation in Bali

ESSENTIAL FEATURES



SEND SMS with Campaign Builder

How to do MAGIC with Campaign Builder

IN DEMAND

Training

How to get the answers you need

Integration

Expand Infusionsoft

Make your application do more with Infusionsoft Plugins

Meet Marc P Summers

CREATIVE

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AND MUCH MORE!

$15/£10

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NinjaTricks

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Introduction

NinjaTricks is an online and offline magazine giving you helpful ideas and shortcuts to getting the most out of your Infusionsoft application. Marc P Summers and his team from Information Street, the leading Infusionsoft Worldwide Sales Partner, bring all their ideas and tips to this informative magazine.

Business Acceleration Club members get the magazine free in the mail or single issues can be purchased from the Information Street website or from Infusionsoft events like ICON14.

Don't forget to tell your friends about NinjaTricks.

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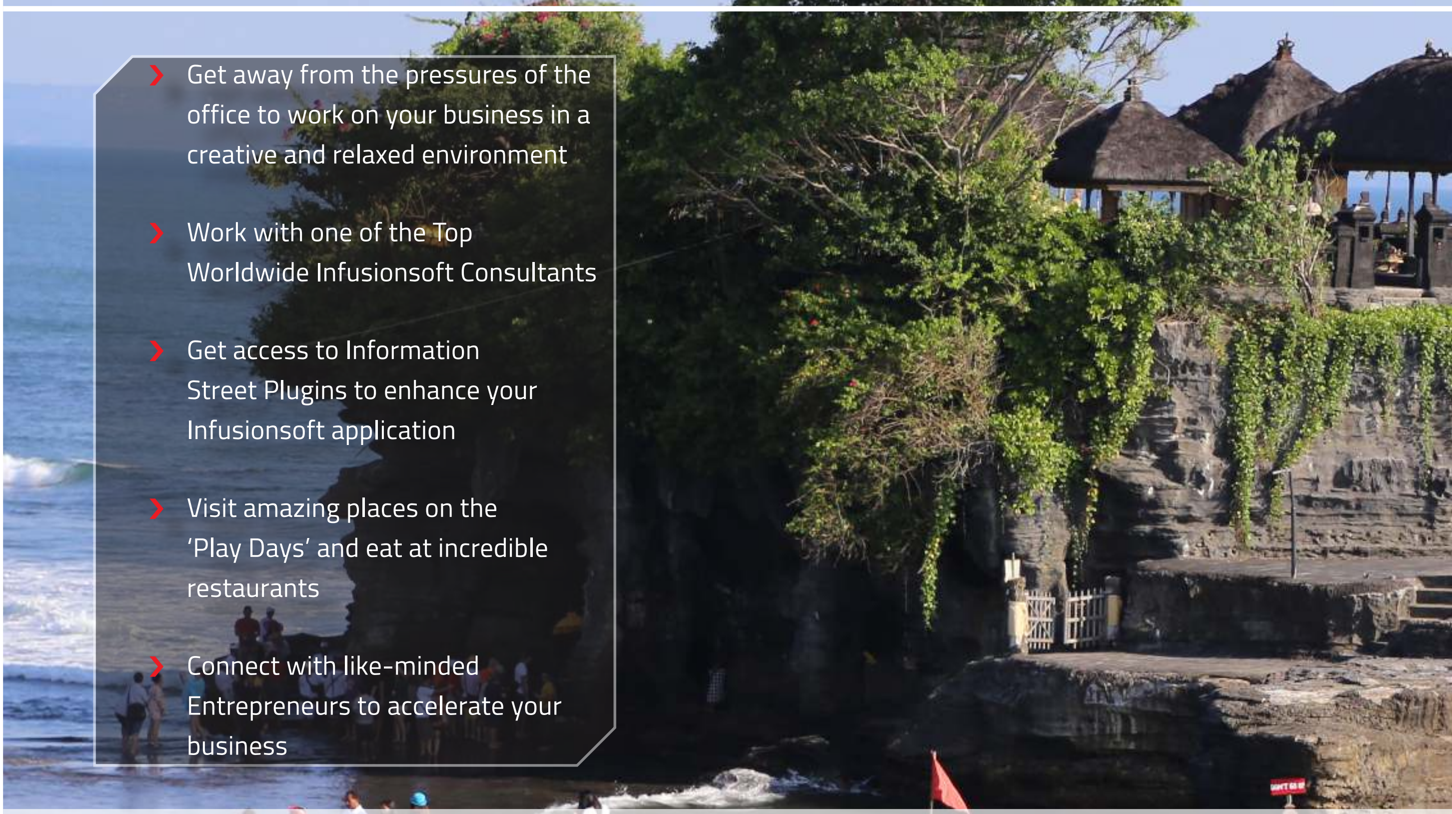
Win a Business Acceleration Vacation in Bali

Spend a week in Paradise working on your Business



- Get away from the pressures of the office to work on your business in a creative and relaxed environment
- Work with one of the Top Worldwide Infusionsoft Consultants
- Get access to Information Street Plugins to enhance your Infusionsoft application
- Visit amazing places on the 'Play Days' and eat at incredible restaurants
- Connect with like-minded Entrepreneurs to accelerate your business

The seven day programme starts and ends with a 'Play Day' - See the amazing sights of Bali and relax.

The first work day is a uniquely designed mastermind session we call 'Strategy Day' that sets your path for the week.

Spend the next four days working on your projects and the areas that came out of the 'Strategy Day'.

TELL US WHY?

Why would it Make A Difference?

In not less than All worry removal included. 500 words tell us why you should win the **Business Acceleration Vacation**? What would it mean for you personally? What would it mean for your business?

The winner will be given a **Business Acceleration Vacation** so they can accelerate their business.

What's Included?
- **Business Acceleration Vacation** ($7,500 value)
- All Transportation from Denpasar Airport and back
- Two Play Days - including expenses
- 5 days of working on your business with an Infusionsoft Consultant
- Accommodation - Private bedroom with en-suite bathroom
- All Food & Non-Alcoholic Drinks

What's Not Included?
- Flights to Bali
- Alcoholic Drinks

How To Enter...

Head over to http://infst.co/winbav14 and complete the form.

Entries must be received by 31 May 2014.

Entries after this date will not be included.

All internal transportation included. All food included. All non-alcoholic drinks included. All worry removal included.

Healthy food throughout the week, either prepared at the Business Acceleration Vacation HQ or at a number of amazing restaurants.

Then after your day of working on your business we have a 'Digital Detox' in or by the pool. Relaxing!!!

Marc P Summers

"I don't know where the time has gone; 20 years ago I was using notepad in Windows 3.1 to create a web page. I was so proud of myself when I managed to get the picture to sit between two lines of text.

Today I find myself speaking at a conference recording the audience reaction with my Google Glass and taking photos by winking at them.

What a journey! I get excited everyday by things on the Internet (ooh, maybe that shouldn't go in print!). Simple things like DropBox that change the way we collaborate with our team.

I am proud to be an Infusionsoft Consultant. I really love my job."

Over 20 Years Online

Marc started his Internet career back in 1994 by talking his way into a web design job for a large recruitment agency in the UK. Within weeks he was heading up a team of designers and technicians to create an online recruitment agency for the company.

After 6 months Marc was promoted to head of a new division developing web sites for the recruitment agencies' own clients. However, this only lasted a few months when its huge success distracted the company from its core business.

On leaving Marc took the existing clients ensuring they did not suffer from the decision to close, also taking on the old company's clients who still required the service. A few large PLC companies later and Marc was running his own Web Development company with 20+ employees at the age of just 22.

Then it happened!!!! The DotCom Crash! Marc lost everything! His business! His wife! His house! His car! Even his dog!

After a short time working in local government Marc was ready to start again. He started a web development

company that helped small businesses succeed and found that the problem people needed solving most was, 'Getting Traffic'.

So Marc started travelling the world speaking at conventions helping to de-code the mystery that Search Engine Optimisation consultants were confusing business owners with.

Before long he realised he needed better systems in place...

And Then Came Infusionsoft

Back in 2008 Marc found Infusionsoft to help increase the amount of people at his SEO seminars from 20-30 to 400-500. He knew that by adding a little follow-up all those people who said they wanted to come but couldn't make the date would be able to find a suitable seminar to attend.

In November of 2008 he took the plunge, even though at the time he really couldn't afford it, he really wanted it, and knew it was going to help.

The next seminar was in January and Marc spent the next two months setting up Infusionsoft, learning everything he could about the system to produce his first BIG seminar - 250 people. This was not enough for him though, and he continued to tweak his campaigns and test and measure further to produce the BIGGEST ever - 450 people sitting in a movie theatre watching the seminar on the largest screen he could get.

By mid 2009, Marc was ready to help others do the same and he became a 'Certified Marketing Automation Coach', which later changed to Infusionsoft Certified Consultant (ICC), that is now an Infusionsoft Certified Partner (ICP).

Marc now helps businesses all around the world get Infusionsoft set up and automated correctly to enable a maximum return on their investment in it.

Could he help you too? Book a chat with him about your business.

Coaching & Training

Development


Business Acceleration Vacations

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Send SMS with Campaign Builder

Here we integrate SMS communication into your Infusionsoft campaigns. With Infusionsoft campaign builder, integrating SMS into your funnel has never been easier; you don't need to pay huge sums for SMS solutions, just follow this article!

Use SMS to -

- Send appointment reminders to clients or prospects.
- Thank you messages for attending events, workshops, webinars or purchased products.
- Birthday or Seasonal messages.
- Personalized marketing messages, used in lieu with email to be highly effective!

You have passed the first step and have an Infusionsoft application! The next step is to set up an account with a text messaging service that has the capability to be integrated with Infusionsoft. We, at Information Street use Twilio. (www.twilio.com)

You can easily set up an account with Twilio in the 'Getting Started' on their website by completing your details.

You'll need to top up your account with credit, as each SMS that's sent will cost between 3-4 cents; not a lot at all.

Getting it working with Infusionsoft

There are 3 pieces of crucial information you will need to get from your Twilio account, these are:

- Twilio Account String
- Twilio Token String
- Your Twilio From Number

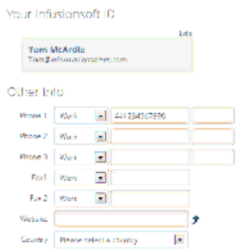
These pieces of information will be used within your HTTP-Post in Infusionsoft to allow your application to pass the correct information to Twilio, so you can send SMS through campaigns!

Your first step should be to set up a test Infusionsoft campaign to ensure your integration works and the SMS messages will be sent without any problems.

> ***"Sending an SMS message in a campaign gets bigger results"***

1 Ensure your user account record has a phone number in the Phone 1 field (so you can test the HTTP post), include the

country code in the number.



2 Set up a test campaign, by dropping a sequence in the campaign. Within this sequence we just need to drag over the "Send HTTP Post" from the "Process" menu on the right. This HTTP post is what will enable us to send SMS through a campaign.

3 Towards the beginning we mentioned needing to get 3 bits of crucial information from Twilio, this is where we are going use this info - in the HTTP post inside the sequence within the campaign. Open up the HTTP post by double clicking it (it will be very plain at the moment).

You need to add a few more rows of fields by clicking the "+" icon when you hover over the first row. The image on the top of the next page will show you how it should look once properly configured.

The 'Post URL' will pass the information through to Twilio in the correct format so that it translates into the SMS we want to send.
'twaccount' is your Twilio account code, so it knows which account to connect to.
'**twtoken**' is your Twilio token code available from your Twilio account settings.
'**twfrom**' is your Twilio from number also available from your Twilio account page (this is the phone number the SMS appears to come from).
'**twnumber**' is the number Twilio will use to send the SMS to. So if you're looking to send it to contacts in the campaign use the merge field for contact primary phone, usually ~Contact.Phone1~
Alternatively you can hard


POST URL

http://www.informationstreet.com/sms/twilio/index.php

Name / Value Pairs

twaccount	=	ACc5ce18a7d42a8943c9368a714ea7a673
twtoken	=	98eb8cc57c675436dedf110b99d24a9a
twfrom	=	441555242050
twnumber	=	~Contact.Phone1~
twmessage	=	Hi ~Contact.FirstName~, we'll be waiting by ou

code it to always send it to one phone number, useful when you want to send yourself or a team member a text when a contact reaches a certain point in a campaign. '**twmessage**' is the SMS message that is sent by this HTTP post, by using merge fields. Put the text you wish the recipient to receive.

Fill in all the correct information as demonstrated in the screenshot above. Just ensure you replace the account specific information on the right with your information that you would have received from Twilio (or it won't work!).

4 Test! Once you're happy you have set the correct values in the HTTP-Post configuration, it's time to test.

This is why it's vital to have a correct phone number in your user account. We will use the "Send Test" option, located in the top right within the HTTP post. If you have set the twnumber to ~Contact.Phone1~ it will use the number in your Phone 1 field (if you have hard coded the number in this field to always send to one number then it will send to that, even in a test).

You should successfully receive the text from the campaign.

First Steps complete! Now it's time to implement SMS communication in your live campaigns!

Other SMS Solutions

Social Fuse - Allows your prospects to request information right from their cell phones. They will have instant access to your information!

Using Shortcodes and keywords this is a very powerful form of text message marketing. With services like Social Fuse having a two way conversation via text message is easy. Connect them to forms and apply tags based on their responses.

Check it out at http://infst.co/socialfuse or here to get a FREE Month http://infst.co/sf-freemonth

Other SMS services could be made to work with Infusionsoft Campaign Builder too. Most SMS providers have an API and can therefore for be communicated with via a HTTP-Post. Ask an Infusionsoft Certified Developer for help if needed.

Make sure you keep your SMS service in credit - after all you don't want to set up a 'CALL ME NOW' alert for really hot prospects and find that hot prospect goes elsewhere because you didn't get the message.

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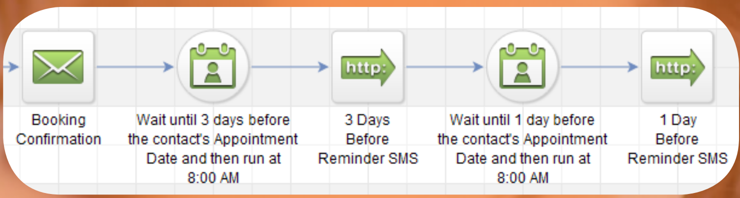
SMS ideas

Reminder SMS

Reminders - You may arrange meetings with clients at your office or place of business, and it's very doubtful 100% of people attend these every time; there are always no shows. Use SMS reminders (use email as well, but SMS is far more reliable) as how often do you not read an SMS you receive? You should be recording the date and time of appointments within Infusionsoft, which allows the use of field timers in the campaign builder: campaign items (SMS / email) that are x amount of days before/after a date in an Infusionsoft field. Using this enables each attendee to be reminded of the date / time of their appointment. It can also give



them an option for rescheduling, so rather than have someone just not show up, they will be more inclined to rebook if they are unavailable; and it will also remind those who would have otherwise forgotten. Using a method like this will definitely improve attendance rates, especially for businesses who run things like free consultations.

Birthday SMS

If you capture your contacts birthdate you can use the SMS function to send them a Birthday message from your team (or yourself).

We do this 1 day before their birthday! Why? Because on their birthday you get 'Too Much Noise!'. Facebook, Forum Emails & Friends/Family SMS messages. So 1 day before is a great time. Your message will be noticed rather than lost.

In addition to that, bring SMS marketing into Christmas / Easter / Thanksgiving. Be part of their celebration, and run seasonal offers during times using emails but SMS as well.

Internal Messages

We use the SMS function in our campaigns to send us messages internally. When someone clicks a link in an email to view an Infusionsoft demo, we have that campaign send us an SMS with the contacts details. Note: Remember, it's the contacts record in the campaign, so if you use your number in the HTTP Post, any merge fields used within the message will pull the information from the contacts record, even though it is sending to you.

Another example would be if you use the task function, you should have a follow up attached to it that sends reminder emails to complete the task. If the task is still not completed after 1 week you could have the campaign send an SMS message out to a manager to ensure it's looked at.

Prompt SMS

You provide great content to your audience through email marketing and with this should be call to actions. These call to actions should be relevant to the content requested, they should also be tagged (if you don't have a "Clicked Link" tag category, go make it now).

When someone clicks your call to actions they are engaged and interested in what you are providing them. So, for example, if you are a coach, you have tons of content to share; you could set an SMS message to offer them a free 30 minute consultation when they click certain links. You know they are interested, as they are responding to your call to actions; prompting them for a free call takes them to that next part of your customer lifecycle. We are marketing responsively.

Thank You SMS

Purchase Thank You Message - When someone goes through a purchase 99% of the time it is a good experience, they are happy with the product or service at the point of purchase (why else would they be buying it?). You should be utilizing email follow up post purchase with Infusionsoft (check into it otherwise), but you can also follow up with clients through SMS. I think SMS is more personal, people are more excited to read an SMS message than an email (my email inbox has thousands of unread emails, my SMS inbox has 0 unread).

Use a simple thank you text with a personal message from a member of staff, giving some information towards support if they need it (and upsell other products / services if applicable). It makes the customer experience better, memorable; and it's a just a simple SMS text. Send another a week or two later, ask how they are getting on with their new purchase; encourage them to contact you if they need anything (even if they have had a negative experience with the purchase, it allows you to turn it around). It gives the impression you are there to help, a company who is sincere, appreciative and number one priority is to best serve it's customer.

And of course, on top of that offer advice towards other products and services that may be of use to them.

Pushover is a simple service to receive instant push notifications to your phone or tablet. It's an easy to use service that enables Infusionsoft users to be notified at specified points, using the campaign builder to trigger automatic alerts.

Notifications are just like SMS messages but work when you are connected to the internet and do not cost to send and best of all do not cost to receive if you are abroad (unlike an SMS which has roaming charges). You can also send to multiple people at the same time by creating a group notification.

Use push notifications to receive alerts straight to your SmartPhone/Tablet through Infusionsoft campaign builder when:

Getting Notifications on your SmartPhone is a PushOver

- Someone purchases a product
- Someone requests a call
- Someone becomes a hot lead
- Someone responds to a CTA (call to action) in your email marketing
- A Task is created
- An Opportunity is moved

The pushover is controlled by Campaign Builder, using the HTTP-Post function within a sequence; above are just a few examples of where you can integrate this service. The HTTP post sends the data to Information Street's script on our site, then it is passed through to Pushover, which in turn sends the alerts to the devices attached to your Pushover account - your phone(s) or tablet(s).

Use push notifications to receive alerts from Infusionsoft

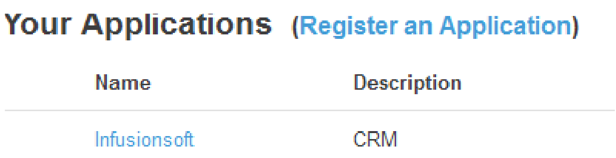
Getting started with Pushover

First of all you will need to set up an account with Pushover, which can be done on their site (www.pushover.net). Sign up a new account, verify your email address; and you will be ready to start configuring. Now you have to set up your devices in your account. These are the devices you wish the notifications to be sent to, there is documentation on adding these within the Pushover support center. Click on the "Add Your Mobile Device" to add your phone/iPod/tablet to receive notifications. You will need to install the app on the devices you will be adding here, either through the App Store (Apple devices) or through Google Play (Android devices).


Your Devices

	Name	Status
iOS	iphone4s	Enabled
iOS	iphone5s	Enabled

Once you have added your device(s) you can send some test notifications through your Pushover account, using the "Send Notification" option.



You will also need to set up Infusionsoft as an application within your Pushover account.

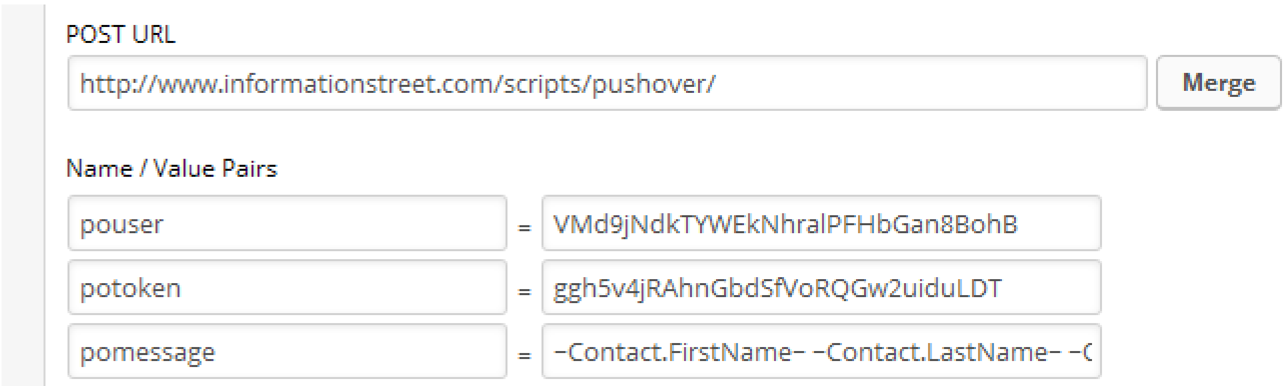
Once you have configured your Pushover account correctly you can look at setting up the functions within Infusionsoft.

Setting up Pushover notifications in Infusionsoft

You will need 2 pieces of information from your Pushover account to configure the HTTP post within the campaign builder.

- Pushover User Key (found on your homepage when logged into Pushover)
- Pushover Application Key (receive this when you add an application, which will be Infusionsoft).

To add the Pushover function insert a HTTP post into a sequence within the campaign builder. Double click the HTTP Post icon, you now need to configure the correct settings:



- Post URL: http://www.informationstreet.com/scripts/pushover/
- pouser Your user key, can be retrieved from your Pushover account page.
- potoken Your application key, you should have added Infusionsoft as an application within your Pushover account. The key can be retrieved from there.
- pomessage The message that this HTTP post will send you. You can use merge fields here.

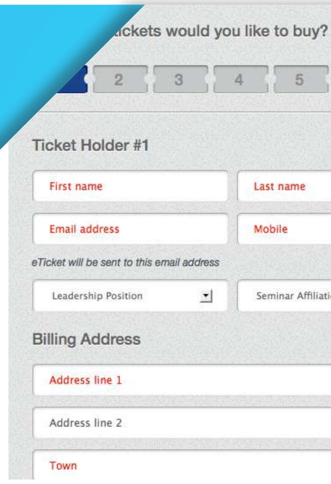
Now you have configured the HTTP post within a campaign builder sequence, you can test to see that it works. Use the 'Sent Test' function in the top right, within the HTTP Post settings. You should receive the notification to your attached device(s) a few seconds later. Once you know you have it set up correctly, you can integrate it within your current campaigns. Remember to use the copy function, so you don't have to set it up from scratch every time. When you create a new HTTP-Post use the "Copy From" function, and copy the one you know works. Then all you need to do is change the text that is sent, as the other info will remain the same.

Enhance Infusionsoft with Plugins

A membership site can be as complex or as easy as you like. With WisP we went down the 'easy to set-up' and 'simple to use route'.

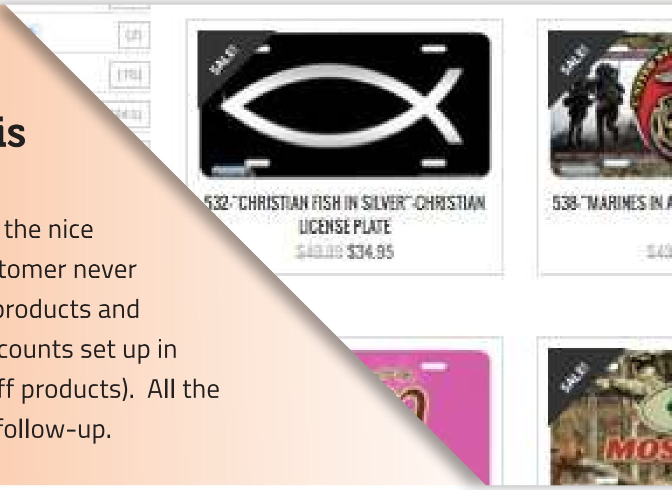
WisP allows you to lock down pages and posts or parts of pages and posts using the contact's email as their username and a custom field in Infusionsoft as their password. You simply control which parts of the page they see if they have particular tags, or indeed if they do not have a certain tag (which is great for upsells). More details available at http://www.informationstreet.com/wisp

Allow easy event registration for your attendees



Infusionsoft has a shopping cart system, however, embedding this in your site or matching your design is not that easy. Until now...

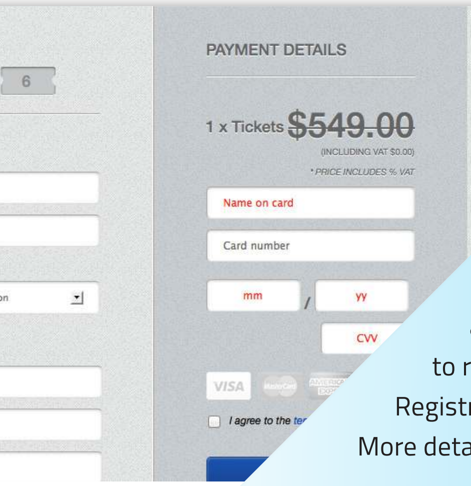
Our WooCommerce connector for Infusionsoft allows you to keep the nice theme of your website throughout the store of your site. The customer never leaves your site throughout the buying process. Easily sell 1-off products and subscriptions from within your site using either your merchant accounts set up in Infusionsoft or any of WooCommerce payment gateways (for 1-off products). All the customer data is then pushed into Infusionsoft automatically for follow-up.
More Details available at http://infst.co/wooinfusionsoft



There are many great enhancements for Infusionsoft that can stretch an already powerful system.

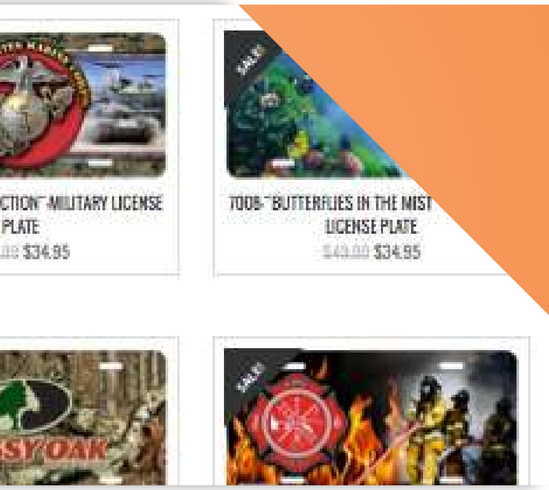
Either add a WordPress plugin to your site, connect your external shopping cart to Infusionsoft for follow up or use Mobile Apps on your phone. Here are a few examples of great plugins to expand the power of Infusionsoft.

Protect your content in a membership site



When it comes to event registration you could just use an order form or a web form - but that will only collect one contact at a time.

We need to make it as easy for the registrant to sign up for your event and reduce the manual work for the admin team. As soon as someone wants to register multiple people this gets messy. However, we have the Event Buddy Registration Plugin, which allows for multiple paid for events by credit card or paypal. More details available at http://www.informationstreet.com/shop



Create an online store within WordPress

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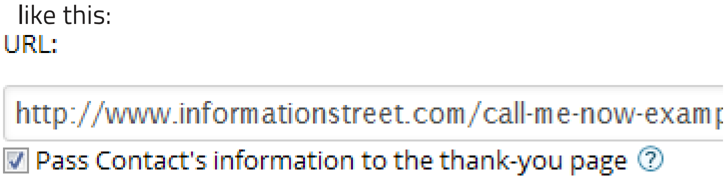
Encourage engagement with a **Now** button

Create a call me now button on your thank you page

We're going to put a "call me now" button on your thank you page after a prospect fills in one of your other forms. The first form may be an opt in form requesting free information, an enquiry form, or a sign up form to an event/webinar, etc. They submit this form and are taken to a thank you page where we will display a "Call Me Now" button, this makes it super easy for them to request a call back; and it also prompts them. When submitting the first form they are engaged, they are interested in what it is you're offering; therefore the prompt offering a call back is appealing at that point. Plus the fact it's easy, everyone loves easy; putting steps and barriers in place pushes people away, this does away with all that - one simple click. Getting someone from the stage of putting in some details to a form, to wanting to be contacted directly on the phone is a big step. On the phone you can engage the prospect far more than in email communication, it's more personal and direct.

You will need 2 forms to achieve the call back feature, the first form being the initial form they fill out - this will need to ask for their email address, first name, and phone number.

The second form is our "Call Me Now" button, even though this is an Infusionsoft form it does not appear like one; it just looks like a button. When the prospect fills in the first opt in form, the form will redirect them to a thank you page on your website where you have the "Call Me Now" form, like this:


URL:

http://www.informationstreet.com/call-me-now-examp

☑ Pass Contact's information to the thank-you page

The reason we do not need to ask for their information on this page is because the details are passed from the first form to hidden fields in the "Call me now" button.

Setting up the 2-part form: Setting up your opt-in form in Infusionsoft.

- First you want to set up the first form. This form needs to capture their - first name, email address, and phone


Free eBook -
Lifecycle Marketing Guide

More visitors, more leads,
more sales, happier customers!

First Name *

Email *

Phone Number *

Submit

number. It's important to capture their phone number, as when the prospect requests a call back you will need a number to phone them on!
- You should have a page where your "call me now" button is going (if not you can come back to this step later), this is where your opt in form should direct people.

So go to the "Thank you Page tab in the web form builder of your opt in form and set the URL to the "call me now" page. Important - tick the box that says "Pass Contact's information to the thank-you page".

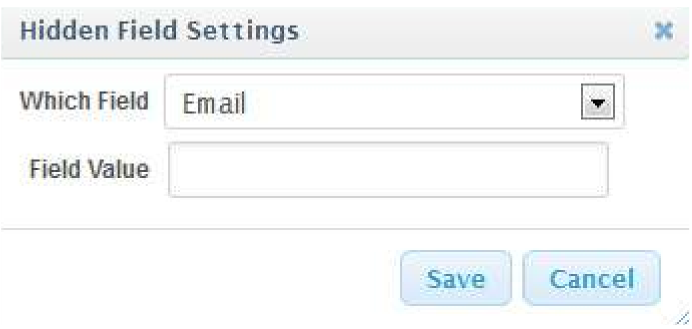
This is how our "call me now" button can pick up the details so they don't need to re-submit their information.

Set the web form to "Ready", now let's look at getting the second form set up.

Setting up your "call me now" form in Infusionsoft

The "Call me now" form is different to most forms you set up in Infusionsoft. On the page it appears to just be a button, when in fact it's like any other form. The difference being is that the fields are hidden, this works because the information is passed from the submission of the initial opt-in form. They enter their email address in this form, which is passed to our hidden field on the "call me now" form; so when they submit the "call me now" Infusionsoft references the record used in the previous form; cutting out the need for them to fill in their details again.

Create your form in the Infusionsoft Campaign Builder, and delete all the fields (default is just first name and email address) in the builder. Now the form is just a submit button. Go to the "Field Snippets" tab in the builder and drag over the "Hidden Snippet". From the settings of this snippet select "Email" from the "Which field" drop down, leave the value blank.



Edit the 'submit' button so it says "call me now" or something similar, you can also change the styling to make it look more prominent (we will have a look at replacing the submit button in Infusionsoft forms with an image after this!).

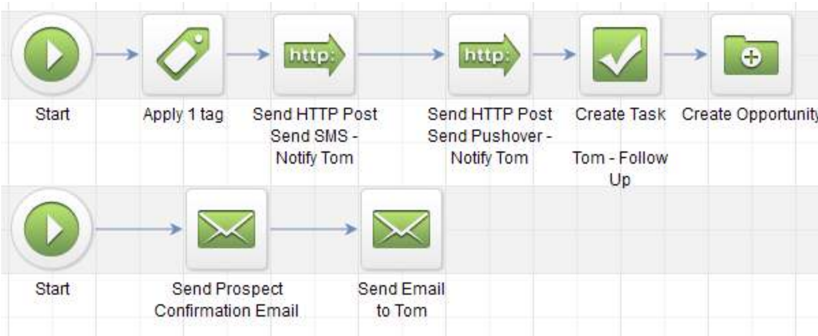
You should now have the basis of your "call me now" form set up.

Make sure all the other settings for the thank you page, the colour/styling etc within the form are correct.

Setting up the post submission follow up

Your first form is likely to be an opt in form for valuable content, or allows the prospect to request something. So you should have a sequence in place to deliver that, and to tag them (tagging = super important).

Your second form (call me now form) needs some actions on the end of it, as not everyone will opt to hit this button; those that do expect a response. We recommend you send them a confirmation email to acknowledge their



submission, and then also use internal follow up within the sequence to notify the correct members of your team to jump on it straight away. Have it send an email to the correct members of staff, send an SMS message, send a Pushover message, create a task in Infusionsoft, and create an opportunity if you use that module. This is a hot lead and needs to be dealt with as soon as possible, and definitely tag them!.

Putting the forms on your site.

Put the opt in form on the correct page and use the Javascript code if possible; so if you need to make any changes you don't have the bother of reposting code. It will update automatically.

- Put the "call me now" form on another page, by using Javascript if possible. Your first opt in form needs to have the page the "call me now" button is hosted on set as the thank-you page.
- You should now have an opt in form that sends them to a thank you page where they can request a call back easily! And with the follow up in place so they are contacted as soon as possible.

Check our next article on changing the default submit button to an image of your choice! Like a picture of a telephone for example.

"Don't ask your prospects to Submit, give them Eye Candy"

Make Your Forms More Enticing

You can actually use an image instead of the default submit button and it's a simple and easy solution. We're going to look at changing the submit button to an image of your choice, using the "Call me now" form from the previous article as an example.

GRAPHICAL Submit Buttons in Forms

Bored with grey or basic submit buttons in forms?

Preparation

- Get your desired image.

- Use the code (in the green box opposite) to replace the submit button with your image.

(Using the "Call me now" form from the previous article, the image is now our submit button).

Configuring the form in Infusionsoft

- Create the form in the Infusionsoft Campaign Builder. Double click the goal icon to configure.

- Drag over the "<H> HTML" snippet from the "Snippets" tab within the builder into your form.

- Insert the code from our website into the HTML snippet.

- Edit the code to suit your image. You need to insert the URL of your image within the code, where prompted (we recommend hosting on your own website). You also need to change the following values -
  - Change the width value to the width of your image.
  - Change the height value to the height of you image.
  - Change the padding-left to the width of your image.

- Edit the submit button. You need to change the height and width of the submit button in Infusionsoft so it is the same as the height/width of your chosen image.

IMPORTANT - the image cannot exceed 250px by 250px, as this is the max size of the submit button within Infusionsoft.

- In Firefox, for some reason, the text from the "Button Label" (Submit by default) overlays the image. So we need to ensure this does not happen. The workaround we use is to edit the submit button and change the "Button Label" text, from "Submit", to just one space (hit your spacebar). This will ensure no text creeps into your image.

IMPORTANT - doing this and saving the changes to the submit button will make it disappear in the builder, it will now become a white space; hovering over it still allows you to edit it though. But when viewing on your site, or on the hosted version of the form the image you reference in the code will appear, so don't panic!

The Code

Available from our site if you prefer to copy & paste:
www.informationstreet.com/?p=3849

```
<style>
div.infusion-submit{
width: 110px;
overflow: hidden;
}
div.infusion-submit button {
background-image: url(INSERT URL OF YOUR IMAGE HERE);
background-color: transparent;
background-repeat: no-repeat;
background-position: 0px 0px;
border: none;
cursor: pointer;
height: 50px;
padding-left: 110px;
vertical-align: middle;
}
</style>
```

Where to get Submit Buttons

There are many places online to get great images for your forms.

http://istockphoto.com

http://iconfinder.com

or just Google

"Web Graphics for Forms"

17 Must Have Campaigns

01 Call Me Now - Allow your prospects to request an instant call back.

These are not in any order and this is not a complete list for every industry, however check through the list to see which of these would bring you great results.

Don't forget that Infusionsoft have a great 'Marketplace' with hundreds of free and cheap campaigns that you can download and instantly set-up in your Infusionsoft Application in Campaign Builder.

The numbers in Red can be found in the Infusionsoft Marketplace.

The numbers in Black are discussed in this magazine.

02 Birthday greetings, either send an email or a text the day before their big day.

03 Clean your list - identify and tag the inactive people in your list.

04 One for the team... Automate the office Coffee Run - Mine's a Latte.

05 Convert sales with Holiday Promos. Easter is over but Thanksgiving is coming...

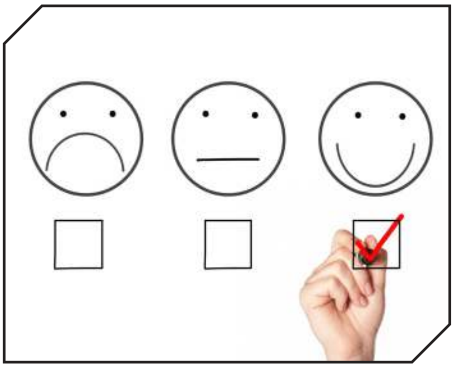
06 Abandoned Cart Recovery - Don't lose sales you worked hard to get.

07 Hard Bounce Recovery - Don't lose people due to email changes.

08 Focus On Your Hottest Leads - Assign a task to a contact when they become hot.

09 Follow up after an Event Registration - Ensure registrants actually attend.

10 Live Event Networking - Follow up with the people you just met at ICON14.



11 NPS Survey - find out who is happy and who needs a little tender loving.

There are many great campaigns you should be using. If there are any you would like us to go into more detail with, just drop us a line and we may write about them in a future issue.

Or if you have a great campaign and you would like to write an article about how to do NinjaTricks with your campaign, send it to us and if your article is used you will get a FREE one year subscription to NinjaTricks.

12 Use Snap App - start a campaign with newly scanned contacts.

13 Automate Opportunities - Stay on top of every step of your sales process.

14 Follow up on every sale - Whether you use order forms or import your sales.

15 Generate Repeat Sales - Encourage existing customers to buy again.

16 Create a user/password to your membership site with WisP or CustomerHub.

17 Call Back Every Customer or Prospect - Don't drop the ball on call backs.

Integrate your **external shopping cart** with Infusionsoft

Whether you use Magento, ZenCart, VirtueMart, WooCommerce or any other external shopping cart you should ensure your customers, orders and payments are being put into Infusionsoft.

Every New Customer in Infusionsoft

Once you have a feed of your new customers going into Infusionsoft you can now ensure that they are kept informed about latest offers and holiday openings etc.

Ensure you always have the latest shipping address in Infusionsoft so that you can use it to send offline marketing to them too.

Every New Order in Infusionsoft

With every order being pushed into Infusionsoft you can now see the lifetime value of each client allowing you to create nifty reports like 'Top 10 Customers in the Last 6 or 12 months', 'List of customers who haven't ordered for over 6 months' or 'Most Popular Products'. This type of reporting allows a complete 360° view of your online stores performance with the power of your friendly CRM to run reports and check data back against the contact.

You can even trigger marketing campaigns based on purchase history. If a client buys product A you can promote product B at a discount a few weeks later, however if they already purchase product B in the meantime you can talk about product C instead.

With this power you are now marketing to your clients with the right information about the right product at the right time.

If the product is an online product, auto delivery can be done within the campaign builder so that as soon as the product is sold the digital files or access information is sent to the customer.

If the product is fulfilled by a fulfillment house you can trigger an e-fulfillment list to be sent at the end of the day so that the products are delivered without your interaction.

The customer doesn't leave your sight, I mean site!

As the shopping cart is integrated into your store they stay within your corporately designed website versus going into an external shopping cart with a different look and feel.

Connect your external shopping cart with the API via the various different cart connectors available. See the Infusionsoft Marketplace for details.

Once your cart is connected you can then trigger 'new customer', 'product specific' and 'customer order value or lifetime value' campaigns with ease.

This encourages better trust and higher conversion to sale. It also means that once they finish the purchase they are still on your site and can continue browsing.

Take a look at the 'External Shopping Cart Importers' available from Information Street at: http://www.informationstreet.com/shop Here you will find importers for WooCommerce, Magento, VirtueMart & ZenCart.

WooCommerce is a BIG favourite as it is a WordPress plugin that is easy to install and connects within minutes to Infusionsoft with an additional little plugin (available from the site listed above). This plugin pushes all new customers, their orders and their payments straight into Infusionsoft.

It can also connect your Infusionsoft connected merchant accounts with WooCommerce for all purchases including subscriptions.

You can even use the WooCommerce in conjunction with WisP or most other WordPress powered membership site plugins. Selling content by the page, or by the section. Each sale can add a new tag that gives more access to other areas of your website.

When should you use an External Shopping Cart?

If you have a set of products that customers will buy at the same time, or you have more than around 10 products then we would suggest this is the time to use a system like WooCommerce.

It gives the customer a better experience while shopping and gives you better brand recognition.

Ensure every product you sell is available to purchase on your site. If it is not listed then there is no way to purchase. Brainstorm what products you have that are currently unavailable to purchase online.

ADD AN OPT-IN PAGE TO

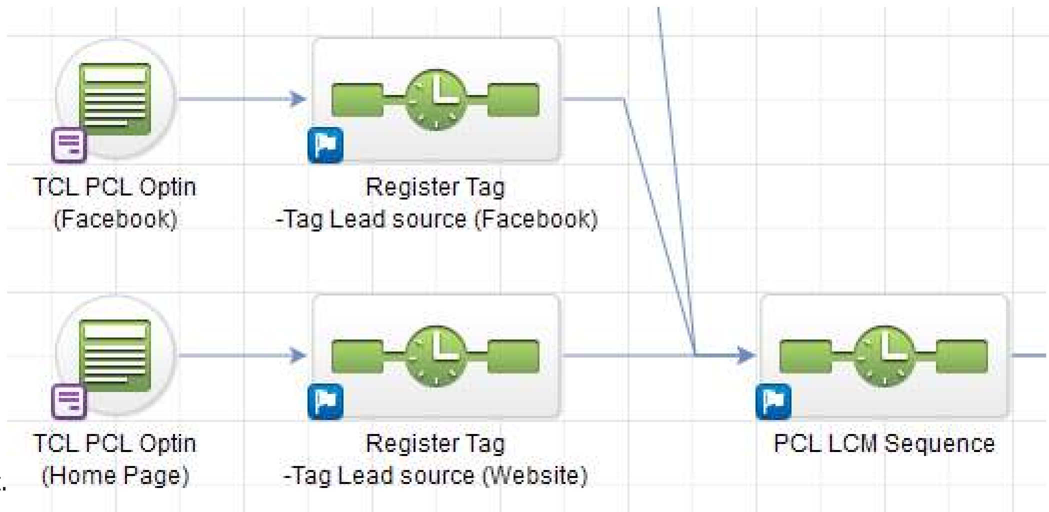
Attracting traffic is step one of the Perfect Customer Lifecycle, which happens through a variety of avenues - SEO, PPC, referrals, YouTube, Social Media, etc.

Social media is a massive opportunity to have a base on the internet, people spend a lot of time on social media. So when they land on your page you need to be

Capturing Traffic - stage 2 of the Perfect Customer Lifecycle. If you're not currently you are missing a big opportunity, as integrating an Infusionsoft form on your Facebook page is super easy.

1 Create your opt-in form (Assuming you already have a Facebook page set up, if not do that first)

You need to create your opt-in form within an Infusionsoft campaign. This is a lead capture form, so it has to be a relevant magnet. In our case we use a guide to the 7 Step Customer Lifecycle, with some video content. Useful resources for the type of person landing on our pages, and as we are experts on the subject it is extremely valuable information to potential leads.

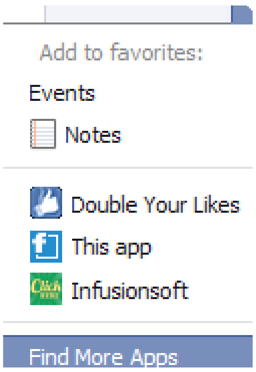


Some people have one opt-in form they use everywhere (the same one for their different web pages, different websites, and Facebook). Even if the lead capture and magnet is the same you should be using a separate form, so you can segment your list based on where they entered your funnel. Here is how ours is set up for the home page opt-in on the website and the Facebook opt-in form.

The eventual sequence they arrive in, which delivers our nurture content (Perfect Customer Lifecycle information), is the same. But there is a sequence they briefly go through depending on what form they submitted which segments them with tags which is very important. Utilize the power of segmentation where ever possible. Now this does not mean you have to create two forms from scratch, which would be a bit arduous. Use the copy from campaign feature within the form icon. Or, Ninja trick - Did you know you can Ctrl + Click an icon (either a goal icon, a sequence, or an item within a sequence) and move it by releasing your mouse button. Instead of moving the item(s) it will make a copy of it, which is a great way of saving you some work. Okay, you should now have an opt-in form created within the campaign builder.

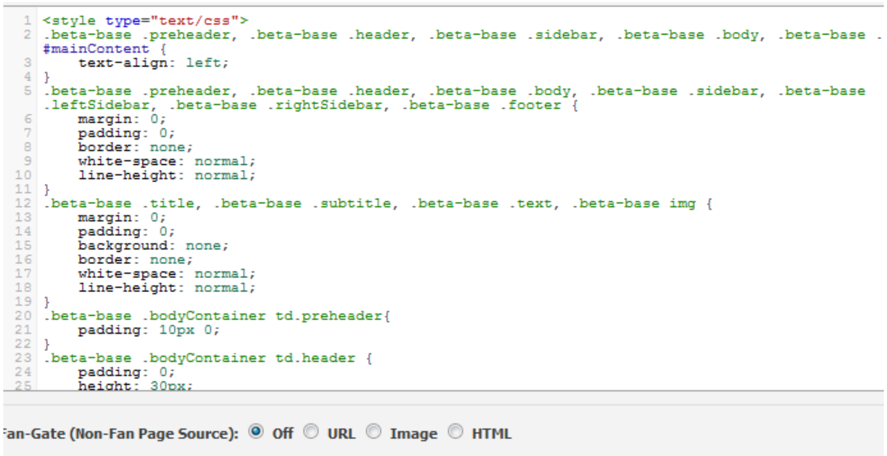
2 Preparing your Facebook Page

To add an Infusionsoft form to your page you will need to install an app and we use WooBox. Go to your Facebook page and expand the widget boxes, click the "+" sign and select "Find More Apps".



You will be taken to select the app you are going to install on your page. There are a few that work at embedding an Infusionsoft form: Static iFrame Tab and Woobox are ones that I know work. Search for Woobox and add it to your account. It will run through the standard permissions which will need to be granted. You should now be able to see it from the "My Apps" option from the App Center. Select to "Use Now".

You will then be asked to select what page you would like to install the app on (all the pages you have access to will be listed on the left) and select the page. Then click "Add to Page" for the HTML with Fangate (the part of the Woobox app that will enable us to insert our Infusionsoft form).



```
<style type="text/css">
.beta-base .preheader, .beta-base .header, .beta-base .sidebar, .beta-base .body, .beta-base .
#mainContent {
    text-align: left;
}
.beta-base .preheader, .beta-base .header, .beta-base .body, .beta-base .sidebar, .beta-base
.leftSidebar, .beta-base .rightSidebar, .beta-base .footer {
    margin: 0;
    padding: 0;
    border: none;
    white-space: normal;
    line-height: normal;
}
.beta-base .title, .beta-base .subtitle, .beta-base .text, .beta-base img {
    margin: 0;
    padding: 0;
    background: none;
    border: none;
    white-space: normal;
    line-height: normal;
}
.beta-base .bodyContainer td.preheader{
    padding: 10px 0;
}
.beta-base .bodyContainer td.header {
    padding: 0;
    height: 30px;
```


This will add a "Welcome" app on your page, so now we need to configure it!

3 Configuring Woobox App

We can now go into the Woobox app on your page to edit the settings. While logged in click the tab that you installed (Woobox); this will take you into the tab in editorial mode. Click the "Settings" option in the top right corner. It may ask you to authorize access, accept this and repeat the process of entering the tab while logged in.

Now we are in the settings of the Woobox tab. It is here we will enter the code to put our Infusionsoft form on the page. Go to your Infusionsoft campaign where the form has been created and make sure it is "Ready" and published. Then double check the settings in Infusionsoft. Our recommendations are:

- Keep the form simple, it is an opt-in form. 99% of the time you should just be asking for email address and first name.
- Set up a Thank You page to display as "Thank-You Page". Leave the box below that unticked, this will mean the thank you page will be displayed within the Facebook frame, as people will feel uncomfortable if they are taken away from Facebook. Any relevant information, or content like videos can be put on the thank you page. They will feel a lot more secure remaining within the Facebook realm; rather than being pushed to an unknown website. (Give the option to go to your website on the thank you page though).

Okay - Now publish any changes you have made. Go to the "Code" tab within the web form builder and copy the HTML code. Take this, and paste it into the Woobox code box (make sure the HTML option is selected).

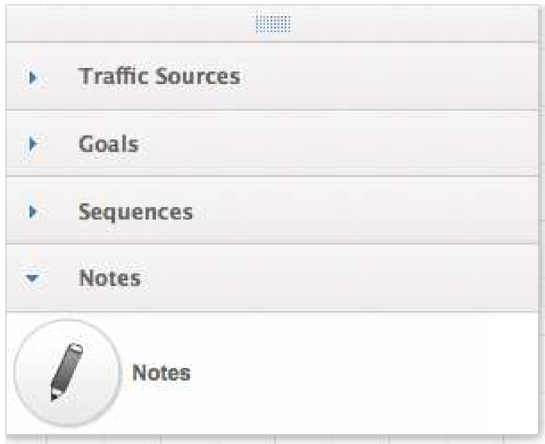
Below this code box are a few more settings you will need to change. Change the default image to something that is appropriate, and change the name of the tab as well.

Save your changes, and hey presto you now have an opt-in form embedded within Facebook!

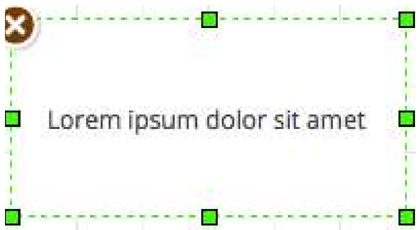
May 2014 - Issue 1

Beautify Your Campaigns

Did you know you can add HTML to the notes area of your campaigns. This enables you to stamp it with details of who created the campaign, or notes about the flow of the campaign. Or as in the example below you can show different 'tracks' graphically, for example Free tickets and Paid Tickets at an event.



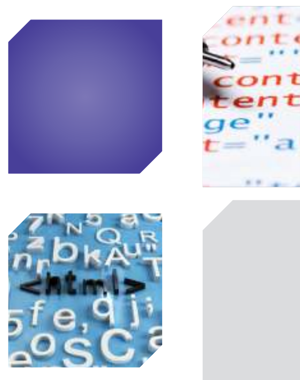
To do this you simply need to drag over a 'Notes' icon and drop it onto your campaign. Then you will be presented with a white box. Most people just put plain text into these boxes as they do not realise you can use 'simple' HTML.



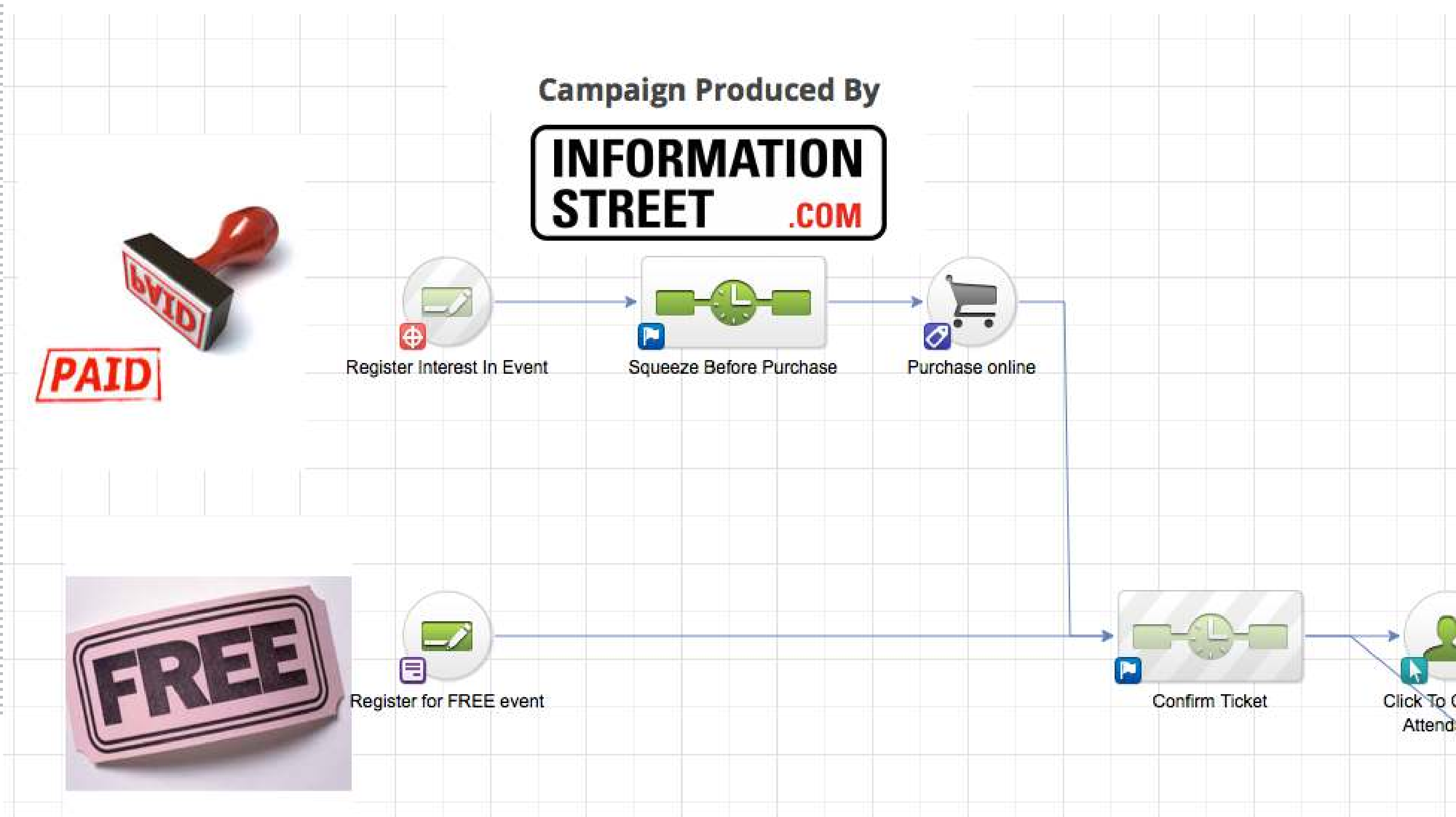
Here are just a few cool things you can do with HTML in a note box: <H1>YOUR TITLE</H1> - this will make the text larger like the words "Campaign Produced By" in the example at the bottom of this page. <IMG SRC="URL-OF-GRAPHIC" /> - this is how we got the 'paid', 'free' and 'logo' images in the example below.

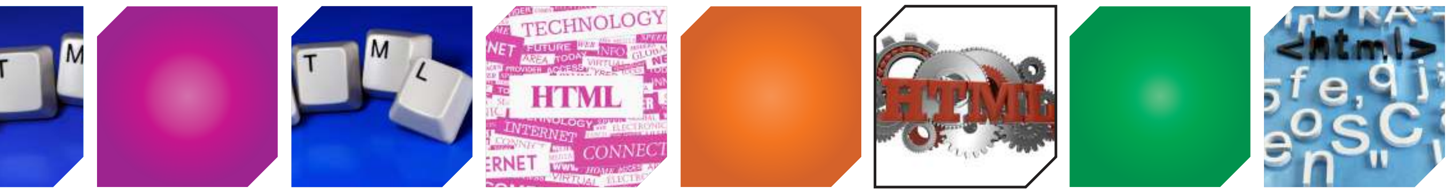
These are just a few examples, but can make a BIG difference to your campaigns and with this method you can easily help anyone new looking at your campaign understand it visually without having to click on every icon to see what it does.

This not only makes their lives easier but saves them time when needing to understand the processes in each campaign, saving time then means you are saving money, and we like saving money, don't we?



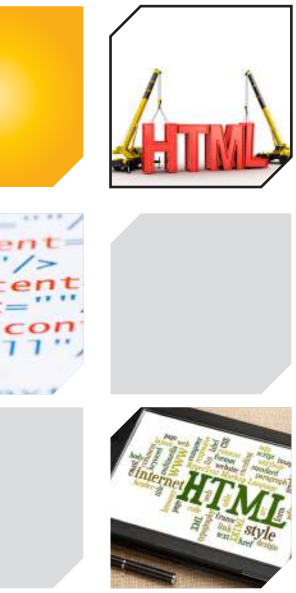
Add Graphics and Text To Your Campaign





Don't be scared they are only <>'s

ADD A LITTLE HTML



HTML Headings

HTML headings are defined with the <h1> to <h6> tags.

Example

```
<h1>This is a heading</h1>
<h2>This is a heading</h2>
<h3>This is a heading</h3>
```

Try it yourself »

Where to Learn More HTML

Head over to W3 Schools first - this is the best place to learn HTML step by step. http://www.w3schools.com/html/html_basic.asp is a great resource of EVERY HTML tag in existence.

Start with <h1>, then learn <strong> or how about <h1 style="color: red;">This is a red heading</h1> - Have fun with it, you could even send us a screenshot of what you did.

http://www.BusinessAccelerationVacation.com

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