

## ***How To Build A Sales Funnel In InfusionSoft***

Link to Video - <http://wp.me/p40fSd-79>

- NICOLA: Okay, well I would like to welcome everyone to the call today. Its Nicola Cairncross here, from nicolacairncross.com and the Business Success Factory and I am delighted to be joined by a brand new friend Michael Wilding, who is just I met through my mastermind group. We get together once a quarter and we talk about all the amazing things we're doing, what's really helped us in the last quarter to make more money online and Michael just blew my minds last mastermind with what he is doing with InfusionSoft. So I thought I would beg him to help me with InfusionSoft campaign - he's going to do that in a moment- but before we go there I just wanted to find out a bit more about Michael and how long you have been online, how did you get started, what you mainly do online now and what do you help.
- MICHAEL: Absolutely, thank you for inviting me today. I got started online about 5 to 6 years ago in the gambling market. I got started by writing a course that told people how to become pro-betters, because I was a pro-better for many years, I made my living from betting.
- NICOLA: Wow! That's astonishing because I play poker but I can't image making a living of it.
- MICHAEL: Yes I know. It's sort of a nice job. I was approached by one of my online marketer to write this course, which I put together ended up being a mammoth course. One lesson every week for over a year. I think it was around one thousand pages by the time we finished, so it was a big course. Following that I built up a sort of a following from that and decided eventually that I was interested in the online world and dove in to see how I could do it. It just got started with a small blog, talking about betting and grew from there. I took almost every course I could find going and I am very much a learner by trial, so I have to try things for myself, so I've got to test them out, try them and make mistake and fix it try again.
- NICOLA: You are a kinesthetic learner then, because there is visual audio kinesthetic, and I am highly visual but at some point, I get to the point where I have to take what I am looking at and do it, so I am visual kinesthetic and you sound like what.... Would you say visual kinesthetic too or more kinesthetic where you just have to dive in and do it.
- MICHAEL: I'm probably more kinesthetic to be honest, I just have to dive in and start out doing it. I can only get so far by being shown and without seeing if it is working or not working I can't quite put it together.
- NICOLA: Okay that it's quite interesting because I think if we know what learning style we are, then it makes life a little bit easy especially online doesn't it? Because you can read, you can watch video, you can listen to audio and then you can actually try things out, and I think if you know where you are it saves a lot of time.

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MICHAEL: Absolutely and you know what you are looking for in the product as well to teach it.

NICOLA: Yeah absolutely. If you bought loads of stuff, you must have bought some right old rubbish and then also bought some good stuff.

MICHAEL: I do buy a lot of rubbish. I would say that amongst it there are a few golden nuggets, although I'm always of the opinion that there is normally something in everything. You just have to find what it is. There's normally an idea or one concept, in almost every product I got. The actual product may have been a load of rubbish, but there was an idea in it that I thought was brilliant, took it out and put it into my own methods, and made it work like that.

NICOLA: Cool. Then you said that it was the internet market that got you started writing your betting course which went on over a year, and it also sounds like that was a written course. Do you want to tell us more about the product or if it's still around. Was it a partnership or was it just you doing it on your own and then you delivered it and he sold it. How did that all worked?

MICHAEL: It's still around, actually it's coming out for version 4 and it's still doing very well and it is purely written. It was delivered by email, one lesson a week and it still is delivered by email one lesson a week and at the end of the each lesson you get a piece of homework. It's about a week's worth of work for people in the course, and they have to complete it before next week because otherwise the next week's lesson actually doesn't make sense. So, it kind of forces the motivation because you get the next week's lesson but you can't actually complete without having done the previous.

NICOLA: I know poker players, who obviously are full time poker players and I know some poker players, one in particular who makes a full time living on the dogs. He goes and gambles on the dogs, and there are other people who do racing, horse racing, but I am not sure how well successful they are, but I know the guy who does well with the dogs. Do you have to be quite mathematically oriented to make money from a bigger betting person?

MICHAEL: Oh yes, I would say you have got to have a decent level of maths although to be honest I think the hardest aspect is actually believing in yourself, which is probably the same across most industries, you've got to believe what you are doing is right.

NICOLA: Well you have to believe, one of my mentors talked about it anyway. They say you have to believe what you are doing is possible, what you are doing is looking at is possible. What you are looking at is possible for other people and then what you are looking at is possible for you and the best sales letters take you for thinking yes I believe this is possible, yes I believe this is

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possible for other people and actually might be possible for me.

MICHAEL: It's exactly the same in betting, I would say and that's broken it down, perfectly.

NICOLA: Yeah cool, so how did you, so your stuff sells, is it wholly owned by you or is it a partnership and how did you get into using InfusionSoft? Is that your main product?

MICHAEL: So I mean, it was a pure partnership and I started with that, and since then I have released other products mainly software based analysis based as that was where my interests lies. I want to actually people learn how to do things for themselves and how sales and how to achieve what they want to achieve without needing someone permanently with them, supporting them.

NICOLA: And software helps them achieve the goals of being better able to analyze things.

MICHAEL: Exactly and it gives you the methods of analyzing horse racing in ways that you otherwise would never be able to do, at least, not unless you could spend a week on each race.

NICOLA: Okay, before we say where people can find some of your product or you online, how did you get into becoming a full time gambler and did you develop this software things because you realized you needed them and there wasn't anything out there.

MICHAEL: Yeah I got into the business by mistake. Probably like most better I wanted to win a little bit of extra money and failing, and then you actually mentioned that you played poker before, I actually wasn't very good at horse racing, I just lost a lot of money and I'm not actually gambler. I don't like betting.

NICOLA: Not losing money. I enjoy betting but I don't like losing money.

MICHAEL: Exactly so I went into play poker and obviously to play poker, you have got to learn the game, which I did and that was it. I wasn't making a fortune, but I was making enough to kind of just live about but what it taught me was the discipline of learning and then every day that discipline of doing the same thing or following what you and not suddenly jumping around from one thing to the next thing.

NICOLA: Learning how to fall 30 times in a row.

MICHAEL: Exactly, just kind of sitting on that ring. Seat and waiting, waiting, and waiting.

NICOLA: Yeah, absolutely so then how to get back to the making software.

MICHAEL: Well, I don't know have much patience sitting in front of a screen like that

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for 12 hours. I went back to horse racing and analysis, where I said I learnt about it. I spent a lot of time in the States on the tracks out there and everything there was database oriented and you don't really have that in the UK. I got profitable out there and came back and I thought well, I need to make this for myself and that's where the software and the analysis techniques I teach in horse racing come from.

NICOLA: Cool, before we go any further, tell people where they can find you online, if they are remotely interested making money from betting and then they want the best software, the best tuition, where would they go?

MICHAEL: So you can find all my racing stuff online at [raceadvisor.co.uk](http://raceadvisor.co.uk) and that is my racing blog, it's got everything on it, everything you'll ever need to know about betting.

NICOLA: Alright, I have got to stick to my poker although I have lost...

MICHAEL: A great community there as well.

NICOLA: It is a great community. I have actually been busted out first in my Monday night poker game for about the last 8 to 10 weeks. So I am not doing very well, although I was area champion at my pub at one point, so I am not always this bad. You go through patches don't you? That is what I tell myself always.

MICHAEL: Always! Always you go through patches and that is one of the hard things you get used to.

NICOLA: Okay, let's move on to Infusionsoft, when did you start using infusionsoft and how did you figure out the awesome thing you are going to show me how to do today.

MICHAEL: Well I start this infusion soft 3 to 4 years ago, and it's changed a lot since then. It has improved a lot. The reason I used it, I was using Aweber before that and I was having trouble with Aweber because I wanted to do things, but I didn't want the same contacts in the list to be getting in the email 8 times, because you had to send it to each list individually, which was my original reason for moving because in Infusionsoft you can control an email based on the contact rather than a list, which is why I moved there. Since moving to the Infusionsoft. I am now on the beta program as well, so I get to see all the stuff before it is released, which is not necessarily a good thing because most of the time, it doesn't work that well.

SPEAKER 3: It provides the autistic...

MICHAEL: In the beta program and then we give them all the bugs.

NICOLA: You must be a power user then if they have got in the Beta program. They must recognize you as someone who is really using it well.

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MICHAEL: Yes. I use it very heavily. I mean an average well over a million e-mails a month through it. I've built out a lot of campaigns and I do a lot of API stuff with them as well. I have actually found some bugs in their API previously that they fixed, that they hadn't known for about 8 years,

NICOLA: So, you really know what you are doing then.

MICHAEL: One of the heavy users.

NICOLA: I'm really lucky to have you on the call then, aren't I? We have got a little bit of a delay, so I need to stop jumping in and trying to talk to you while you are still talking.

So I begged you to help me because what I had before was a miscellaneous and I am sure it is very typical of everyone else, how they get started. I started using, Infusionsoft because of campaign builder, but my coach that I was assigned, so I had a false start within building everything out in the legacy section, which annoyed the hell out of me, and then I found out how to do campaign builder but what I was doing was building out.

I had one master sequence here, which was a big follow up sequence which occasionally tried to sell things in the text of the story and wasn't very successful although it did warm up my new subscribers nicely, so they know lots about me. I had double this actually. I had double this I was telling you earlier before I met you, and so people would come in to one of these, they would get the follow up tag luckily, and then they would be added to the master sequence via what is called the trigger tag. But it was unwieldy and cumbersome. I could see it getting bigger and bigger and when you showed us your way of doing things, which you very kindly made a video for us in the mastermind, I came home immediately and set this little beauty up, which I was following your video steps, and that's why you have all the opt ins coming in.

That is just a bit slow today and probably thinking "wow she is just up to her game". I've diligently moved all my opt ins to the left hand side here, and put the follow up in follow up sequence reach opt in, just so they all get tagged and they all get whatever they've opted in for and now I have then done what you advised which is to put a blank sequence with a one-day delay in. Then they are getting the warm up sequence which is the 5 emails, which tell them how to white list and introduce me, and give them an helicopter over-view and all that stuff, and then you had a selling sequence in here, so I have left just a gap and then you put them back into a blank sequence of 3 days, and then I think you move on to either more follow up emails or another selling sequence.

So what I need to help with is I have got two kinds of things. I have got money people and internet marketing people and success thinking people.

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Well, we will leave those to one side for now. I have copied your outline you date, which was if someone indicates an interest they go into offer 1 sequence, and then there is also an offer 2 if they have I think this is where you put them in according to tag isn't it, so you can actually move people in who've indicated interest in making more money for example, you take over from here.

MICHAEL: Okay, so let's put this offer 1 and offer 2 after your warm-up sequence now. So, actually the first thing I would do, is does your warm-up sequence have a time of delay the end of it or not?

NICOLA: Let me show you,

MICHAEL: Because if it doesn't, you want to put another blank sequence in, just so that we've got a delay and they don't immediately get sent an offer, and obviously that is a personal structure. I always like to have a timer at the end.

NICOLA: Okay, do you mean here in this bit or do you mean back in the other bit.

MICHAEL: Yeah, so you do your last one is actually wait at least one day, before you apply the tag, so the last email goes out and then you're waiting a day.

NICOLA: My follow ups only go on Tuesdays and Thursdays, because I like to leave Wednesdays, Fridays and Saturdays free for other things.

MICHAEL: Okay, well, it makes perfect sense. So that's fine, so it's just to make sure that you are not sending them straight from the warm-up sequence into a sell sequence without a pause of a day or so before they get it, because you have got that timer at the end, obviously a pause is there.

NICOLA: Can I just ask a question so I've got a start warm-up sequence tag there and I have gotten a finish warm-up sequence one tag there. Should I move my tag to before the delay?

MICHAEL: It doesn't really match to be honest. I mean actually I would leave it where it is, but when it is employed you know they've actually moved out of that sequence totally.

NICOLA: Fair enough, right. So let's go back to the campaign then.

MICHAEL: So what we want to do now is we want to send them either offer 1 or offer 2, but what we don't want to do, we don't want to send people who have already seen offer 1 that offer again, because obviously they have seen already seen it. So we can delay that connection that you are on at the moment.

NICOLA: I think I would like to go with the internet marketing first.

MICHAEL: Okay, no problem. So you want to go drag your connector from the warm-up sequence 1 to offer 3.

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- NICOLA: I will change the name from offer 3 to offer 1 in a minute. Let us make it offer one, just for the sake of tidying.
- MICHAEL: And so what's that doing now of course, sending the people go straight up into offer 1.
- NICOLA: I am just doing it, sorting it out, so we can call it the right thing.
- MICHAEL: Okay, so now at the moment what's happening is they are going from warm up sequence 1 straight into offer 1. We also want to drag from warm-up sequence 1 to offer 2 and when we do that we are going to get a little note up here, a little gray box. That is the Infusionsoft decision note, and we use this to determine, when we are going to send people to offer 1 and when we are going to send people to offer 2, and for the sake of argument, we're also going to drag now from warm-up sequence one to blank sequence. Oh, sorry you have got both offers out there, so you can drag it straight to get both offers.
- NICOLA: From here we want the sequence to go for both offers. Before we go there, do you know how to move blocks and stuff around, because I would quite like to move this over to the right and then move this down so it looks visually logical.
- MICHAEL: Absolutely, hold down your left mouse button and drag over all the boxes.
- NICOLA: Got to remember I am on a Mac so sometimes it doesn't work the same as Pc's.
- MICHAEL: I am a Mac user myself you just have to select the boxes and now you can left click and move them wherever you want.
- NICOLA: Really that is awesome, let's move it right over so we can get the other thing in, and then the same with this yeah. I have never known how to do that, that is so cool.
- MICHAEL: Yeah, it is one of those things that are actually not written anywhere that I am aware of at Infusionsoft help.
- NICOLA: Well, it is but it is impossible to follow with their instructions.
- MICHAEL: You should know how to do it.
- NICOLA: Their instructions do not bear any resemblance to what happens on the screen.
- MICHAEL: Okay, so now it is looking awesome nice and neat, what we have got, is what we have got, this is following warm up sequence into this decision square, and from there is possibilities, they can go to offer 1, offer 2 or got both offers. So the first we are going to do now is we are going to make some tags for these offers, so that we know when they've started the

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sequence, when they've finished the sequence and that tells us whether they have been through that before or not so we can make the decision where to send them.

NICOLA: Okay, so if we go in there and do that process.

MICHAEL: Yeah, apply your tag?

NICOLA: And then I am going to have communication. I can put one in for now and I can come back and put in others if I want to can't I? My sales copy.

MICHEL: Yeah, and add a finish tag. So let's just create a tag for this offer.

NICOLA: It's TBSF books.

MICHAEL: I don't think you have actually created the last one there, Nicola.

NICOLA: Oh! Didn't I? I didn't create press create offer 1 TBSF. Well spotted.

MICHEL: That is another thing, when you are creating the tags in the campaign build, you actually have to hit the create button, otherwise it doesn't create it.

NICOLA: And the other thing it's not doing is putting categories on them, but we can go back and I can do them in my own time later.

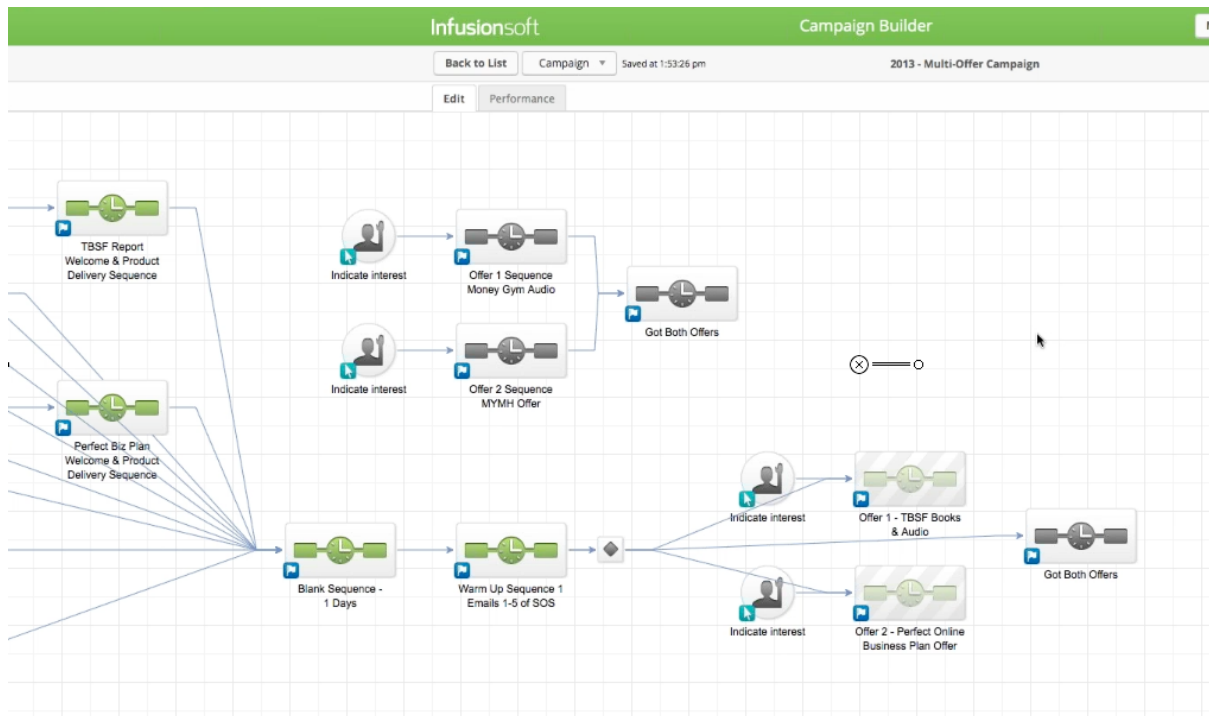
MICHAEL: Also if you ever create tags inside campaign build, it doesn't add in categories. So I put my tag into [no sound], and you can't do that currently in campaign build but you have to go and do it afterwards.

NICOLA: Okay so I click ready up there. I am just going to click in here because it won't show otherwise. Okay, I am doing that so this one. Sorry it is a bit boring for you, but everyone watching is actually riveted. Manage your money honey. Do not click that one if we haven't clicked create. Manage your own money honey. God I could never remember the initials for that. Okay, so ready back to the campaign, and then what happens here?

MICHAEL: Actually what I am going to ask you to do now is go out coming out offer 1 and offer 2 you are linking to go at both offers at the moment. I am going to ask you to delete those links from offer 1 to go to both offers and offer 2 to get both offers.



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NICOLA: Oh okay, I see why.

MICHAEL: Oh okay us go back to the decision note, now. So, how we are going to say where people get sent. So, if you double click on the decision note.

NICOLA: Yeah, this is the bit, where I thought I have to call your help in here, because my brain just imploded when I was watching the video the logic of it.

MICHAEL: Yeah it takes a, it is a very logical process, it takes a little bit of getting your head around it. So, what we have we got three sections because there are three possible places that a contact or a lead can go to. They can go to offer 1 offer 2, or got both offers. So, we got these 3 sections there and in each section, we can apply the rules that say whether someone goes or not. So, we start with offer 1 and we click on the plus rule.

NICOLA: So for example if someone had already bought or been sold this.

MICHAEL: Exactly we don't want them to have it. So, if you click on "please select and choose contact" and then we get the option to "select again" we chose tags. Again we hit "selec"t and we want doesn't contain, because we don't want them to have had the offer.

NICOLA: Okay.

MICHAEL: So it doesn't contain the starting sequence. It will give you drop down selection.

NICOLA: Offer, start, there we go-start, offer 1 TBSF books.

MICHAEL: So what that says in a moment is that if a contact hasn't started this offer,

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because they only start when they begin. Exactly. They haven't had that tag if they've never been into it. I don't know if they've brought the product.

NICOLA: Yeah, they might have, so do we do and or OR.

MICHAEL: OR.

NICOLA: Yeah, type to search, and then we can find the purchase tag.

MICHAEL: So, the purchase tag for someone watching is once anyone buys the product you can tag them as having purchased that product. So we can filter that content out by the products they bought as well.

NICOLA: Here we go. TBSF books and bonuses purchased.

MICHAEL: Okay, that's all we need for rule 1, so if the contact doesn't contain the starting tag or the purchase tag, then they'll go into the rules, then they'll go into offer 1. Are you still with me on that one?

NICOLA: I am following, for some reason it is much clearer when you are talking me through it than it was looking at it on my own.

MICHAEL: So that is no problem. Now offer 2 is a little bit more complicated. We only want to send them in to offer 2 if they haven't started offer 2 or purchased offer 2 and if they are not in offer 1 because we don't want to send them to offer 1 and offer 2 at the same time.

NICOLA: Yeah.

MICHAEL: So we go through the first rule again.

NICOLA: Yeah, and I realized it wasn't manage your money.

MICHAEL: We do exactly to the same as initially.

NICOLA: If the contact tags don't contain? Tell me again?

MICHAEL: So, now we are doing is exactly same as above for the moment. So start off with offer 2.

NICOLA: Okay, I will change that tag on later.

MICHAEL: Or the customer tag for offer 2.

NICOLA: Oh here we are.

MICHAEL: Okay so at the moment, let's just say if they haven't been in the sequence for offer 2 or bought it they'll go in there. So this is where the cool bit comes in okay. So there is a little hand box on the box at left. Click on the hand box and that allows us to add a second rule and this time we are going to say if the contact text contains and in the fields we are going to put start offer 1 or

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customer tag for offer 1.

NICOLA: For 1.

MICHAEL: Okay so there is, so what this is saying if the contact tag doesn't contain the starting sequence for offer two or the purchase. So that's means they haven't been sold it or they haven't bought it, and if they've already seen offer one or bought offer one then they go in to this offer 2 sequence.

NICOLA: Okay, so you don't want to sell offer 2 to the people who just bought offer 1 and you don't want to sell offer 2 to the people who're in, who started but not finished the selling sequence for offer one.

MICHAEL: Exactly, so you want to sell offer 2 to the people to the people who are already in offer 1 and you don't want to sell offer 2 to the people who have already both or beat in the sequence offer 2.

NICOLA: Right, that's wrong then because...hang on. I am confused, so are you saying if someone's been in the sequence for offer 1 and they bought offer 1 you done want to sell them offer 2 straight away. You want to do it at a later day.

MICHAEL: Yes because what will happen with this decision though is it will send any of the rules it will send them both immediately.

NICOLA: Okay right.

MICHAEL: So if we just had that first line for both of them they get on offer 1 and offer 2 sequences simultaneously, at the same time.

NICOLA: Yeah, that's not good.

MICHAEL: Yeah exactly, we want to make sure that not getting all sequences in the same time.

NICOLA: I think I need to very quickly go and change my tag names because I think this might confuse people watching and me. Instead of saying profit on my business plan which is what offer 2 actually is rather to manage your money honey. So I think I just need to go and quickly change those tags, so I will edit this bit off the recording.

MICHAEL: And I have also seen that.

NICOLA: Okay, wait while I do that and then you will do whatever you've taken, you've seen there Do I need to save anything here?

MICHAEL: Not you just go back to the campaign.

NICOLA: Campaign? Okay Let's go off to tag and sort this out or it will just be confusing otherwise. What we could do while we were off air, as it were is we could do the first part of that, we will do discussion and talking about

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you and everything as the, let me think about it. We need a front-end product that is going to be more with 10 dollars I think. Okay offer 2 now starts, offer 2 is, perfect online business plan. Well, we will see how we go anyway, we can all sell it cheap first and then see how many we sell and then think about if from it. Okay good so that's that done and let's go back to now to the campaign.

MICHAEL: Is it making sense to you so far?

NICOLA: Yeah ,it is I just realized it wasn't going to carry on making sense to me unless I am sorted those tags out. Do you draw this out on paper first before we do on campaign builder or do you work it straight

MICHAEL: No, I don't actually, yeah.

NICOLA: Okay.

MICHAEL: It is one of those things I am quite lucky as I can kind of see it my head.

NICOLA: So where were we? We were in the decision note, weren't we?

MICHAEL: Yeah.

NICOLA: Taking up from where we left off, where I had to go off and tidy up in an obsessive / compulsive way, just talk me through this second one again.

MICHAEL: Okay, before we go to the second one, I've seen a mistake. You put in the second part of the second one and if the contact tags contains the start, you want that to be the end. So you wanted them to go in there if they finished.

NICOLA: Okay, if it finishes off okay.

MICHAEL: You had an end tag as well for this sequence.

NICOLA: Tell me why we need to change that because I do not understand why we need to change that?

MICHAEL: Okay, so if we do in the top section of the 2, what that does is go in to the offer 2 sequence because if the prospect hasn't never been in the offer 2, never started it or they have never purchased it.

NICOLA: Yes.

MICHAEL: Okay, so that's the first section. The second section is saying we also don't want to send them into offer 2...

NICOLA: We also want to send them in offer 2 yeah

MICHAEL: Yeah. So we also want to just send them in to offer 2 if they finished offer 1 sequence but they are not in it anymore , they have actually finished it, or they've purchased offer 1.

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The screenshot displays the InfusionSoft Campaign Builder interface. At the top, there's a green header with 'Infusionsoft' on the left and 'Campaign Builder' on the right. Below the header, a navigation bar contains a 'Back to Campaign' button and the text 'Warm Up Sequence 1 Emails 1-5 of SOS' Decision'. The main content area is divided into three sections for rule configuration:

- Rules for: Offer 1 - TBSF Books & Audio**  
If the Contact's Tags doesn't contain 2013 - Starts Offer 1 (TBSF Books) or Customer Tags -> TBSF Books and Bonuses Purchased.  
+ AND  
+ RULE
- Rules for: Offer 2 - Perfect Online Business Plan Offer**  
If the Contact's Tags doesn't contain Prospect Tags -> 2013 - Starts Offer 2 (POBP) or Customer Tags -> 2013 - Perfect Online Business Plan.  
AND if the Contact's Tags contains 2013 - Finish Offer 1 (TBSF Books) or Customer Tags -> TBSF Books and Bonuses Purchased.  
+ AND  
+ RULE
- Rules for: Got Both Offers**  
By default this Sequence will always run.  
You may add a rule to specify criteria that a Contact must meet to be allowed into this Sequence.  
+ RULE

NICOLA: Okay, alright, let's put in a.....

MICHAEL: The rules you make for each of these sequences they are always the rules to send someone into the sequence.

NICOLA: Okay, that's makes life easier.

MICHAEL: So it's never not sending them into the sequence. The rules are always to send someone into the sequence. We have to look at what situations we want to send someone in. For offer 2 we want to send them in if they have never been in the offer 2 sequence. If they've never purchased offer 2 and if they finished the offer 1 sequence or they've purchased offer 1. Because if they haven't finished offer 1 sequence or purchased offer 1, they are already going to be in the offer 1 sequence instead, so we don't want to start the offer 2 yet.

NICOLA: Okay, so and if the contact tag contains that they finished offer 1 or /and... which one do I chose? Or. Or if they've bough offer 1.

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MICHAEL: Exactly.

NICOLA: Okay, getting it, slowly and painfully.

MICHAEL: Because what we do is we're adding a goal as well to offer 1 which will stop the offer 1 sales sequence as soon as they purchased it.

NICOLA: Okay, now we are getting highly sophisticated,

MICHAEL: Because you don't want to keep selling it to them, if they have already bought it.

NICOLA: No, you don't.

MICHAEL: Okay is that making more sense?

NICOLA: Yes, it does make sense, especially now you said it's always about sending them into a sequence.

MICHAEL: Yeah, it's always about sending them into a sequence. It is always the condition to start it, nothing else.

NICOLA: Yes, cool

MICHAEL: Okay so our final rule, is if people have both the offer. So you have a rule there, and this one is if the contact's tag contains

NICOLA: Let me guess. They've finished both offers or they've bought both products.

MICHAEL: If they finished both of the sequences or if they've bought both products.

NICOLA: Okay, cool, so finish offer 1 and finish offer 2 and

MICHAEL: Hang one, you don't want the "and" there.

NICOLA: Okay, I will get rid of that.

MICHAEL: Because if they finish both that's one rule so that is if they finish both sequences they move in.

NICOLA: Yeah, yeah. Is that a new rule down here?

MICHAEL: No, that's all you are going to be able to put in here, but what we will do is you add a tag when they purchase that adds the finished offer tag to them. So when they've bought the product they don't just get the customers' tag they also get the finished offer tag.

NICOLA: I am lost now.

MICHAEL: Infusionsoft only allows you to add "and" rules, essentially we want 2 rules here. If they finished both of the sales sequences or if they purchased both of the products.

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- NICOLA: Yes.
- MICHAEL: But the way Infusionsoft is set up at the moment we can't add an "or" rule underneath those. You can only have "and" so what we have to do instead is when you buy the product you can add a tag to it, your customer tags.
- NICOLA: Yes, the product action is ....
- MICHAEL: So when they purchase the product again. Exactly! What we do is we add into that action another tag, which is the finish of the tags is well when they buy it.
- NICOLA: Oh, So if they buy email 1 you don't want to get the email 2 and 3 when they've already bought.
- MICHAEL: Exactly, so we actually add that tag in anyway, so we know that we don't want to sell them that offer again. They've finished the offer, and that's how we leave it. So anyone who has purchased either of those who also has the finish of the tags on them .
- NICOLA: Yeah, so I need to now go and add those as purchase actions on these two offers?
- MICHAEL: Exactly.
- NICOLA: Let's do that. Every product I set up from now on I will have that tag added to it.
- MICHAEL: So it will stop and what it would do is that it will stop them from being put into a sequence of something they've already bought.
- NICOLA: So here we are - purchase action. So, it is a TBSF perfect business plan. Okay add new action, apply new tag and that will be finish.
- MICHAEL: Finish offer 1.
- NICOLA: Yes offer 2 of the perfect business plan, so now we finish offer2.
- MICHAEL: I think you put it into prospect.
- NICOLA: Did I, I've tied it up already. You have to make your titles on it. Finish offer 2. there we go.
- MICHAEL: The way I actually structure my tags as usual, is what I actually do is I put the product name with the tag first. For example, I will put PODP first and then the other information afterwards because it is alphabetical in Infusionsoft so you can go straight to that product .
- NICOLA: Yeah and it groups it altogether so you can have your POB opt in, POB webinar, clicked, watched POB purchase etc.

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- MICHAEL: So it will all be in one area.
- NICOLA: That's fine is now. I have got finish offer 2 as soon as to buy the product and then I just need to that for offer 1.
- MICHAEL: Because we never put someone into a sequence if they've got the finished sequence tag, when they purchase that they are getting the finish sequenced ta, so they will never be sold that again.
- NICOLA: Brilliant. I definitely don't want to do that anymore. Finish offer 1. There we go, major tag tidying coming up. Oh god ,you have to be obsessive compulsive to use Infusionsoft don't you?
- MICHAEL : Absolutely.
- NICOLA: I have done my purchase actions and I can go back to my campaign now.
- MICHAEL: Yeah.
- NICOLA: Okay in the mean time someone else have joined it "Oh Lord. good job we are doing this today and not or load , because we didn't yester day not next week .
- MICHAEL: It's okay because everything will be working how it was before until you publisher. Nothing will be changed before you publish.
- MICHAEL: When you change things in Infusionsoft you don't have to worry, it is only when you publish does it goes on.
- NICOLA: Yeah, which means nobody is getting sold anything that is why we are so glad we could do today. Okay so that's the decision note, is that all done then?
- MICHAEL: So that is all done, if you want to open it just to have one last look, or if you are happy with it?
- NICOLA: No, no let's go and have one last look at it for the benefit of our viewers.
- MICHAEL: So what we can see now is each offer has its own rule and that works independently from all the others. The rules are only for sending someone's into that sequence. So for offer 1 that's where we want to go first.We're sending them in if they haven't started offer 1 or purchased offer 1. For offer 2, if they haven't started offer 2 or purchased offer 2 and if they have finished offer 1 or purchased offer 1, then they will go into offer 2.
- NICOLA: Okay, so it's always working on the positive rather than negative.
- MICHAEL: Exactly.
- NICOLA: Things that have happened and the actions they have taken.



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- MICHAEL: It's always actions they have been taken.
- NICOLA: Okay.
- MICHAEL: And they get both offers if they finished 1 and finished offer 2 tags and now that we have added those purchase action...
- NICOLA: Hang on can we back up a little bit...
- MICHAEL: At the purchase action.
- NICOLA: So they are not getting both offers. They are moving into a sequence that says they have had both offers.
- MICHAEL: Exactly.
- NICOLA: Okay, cool.
- MICHAEL: So the sequence is we have got this lead has already got or been through the sequences for both offers.
- NICOLA: Yeah.
- MICHAEL: So we don't want to send them through either.
- NICOLA: Okay, alright.
- MICHAEL: Now what you want to do is you want to add a goal. You put this just after offer 1 to start with and the goal is to purchase online and you drag that in and then double click and chose the products, so the goal in Infusionsoft, a specific product purchase. A goal in Infusion soft will automatically stop the sequence once that goal is achieved. What that means is that someone in the offer 1 sequence as soon as that contact has purchased the product, they will stop getting emails for offer 1.
- NICOLA: Okay. Is that a result of purchase action that we just had or the result of the goal being achieved.
- MICHAEL: No, the purchase action is set. The purchase action is what is applied to your contact once they bought automatically.
- NICOLA: Yeah.
- MICHAEL: The goal is simply, we are going to stop this sequence if this is achieved.
- NICOLA: So are you saying that I didn't need to have gone and added those purchase actions.
- MICHAEL: No, you still need to rule out the purchase actions so.
- NICOLA: Okay.

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MICHAEL: So, the difference is a goal is, if I only used the goals in campaign builder and they come out on a sequence, so what that is you dictate the goal, so in this case the goal is buying your product, and to buy a product during this offer 1 sequence.

NICOLA: Yeah.

MICHAEL: As soon as they've bought that product, the goal has been achieved and so we stop that sequence. That is all it does, it just stops it because you have achieved the goal.

NICOLA: Okay.

MICHAEL: The purchase actions is what happen after the goal is being completed, if you like. So now they have bought this product, we are going to apply these tags to them and send them this email.

NICOLA: and all that stuff, okay, got it.

MICHAEL: So the goal is literally just that we are stopping this once this goal is being achieved.

NICOLA: Okay, cool and then we need another one for this one.

MICHAEL: Absolutely.

NICOLA: We talked about that.

MICHAEL: One of the great things about Infusionsoft is that you don't want to annoy your customers by continuing to send them sales emails when they've already purchased something.

NICOLA: Absolutely and that's one of the reasons I moved to Infusionsoft, because one of my very good customers kept complaining that I kept marketing things he already bought.

MICHAEL: Okay, so that is looking nice but now what we have is you're going to need move both those offers out of the way or just scroll across the screen a little bit, so you got a little bit more space on the right hand side.

NICOLA: Go over there, scroll across by clicking shift and drag.

MICHAEL: Or right, click and drag.

NICOLA: Alright, look at that...nice.

MICHAEL: Yeah, the things you have to do.

NICOLA: Yeah, okay, so leave that out there-

MICHAEL: Okay, what we have to do now is someone is going into offer 1 that doesn't

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- mean that they bought offer 2.
- MICHAEL: No.
- MICHAEL: Because they are only going into offer 2 in our last decision note, if they haven't been in offer 1 or bought offer 1.
- NICOLA: Yeah, if they are not in offer 1 already or bought offer one.
- MICHAEL: Exactly and not going to see offer 2. We are going to make sure that they do, if they haven't seen it before. We go from the purchase online to offer 2 and we go from purchase online to get both offers because now there are two choices. They have either already both offer two or ...
- NICOLA: Hang on, was that right, was I connecting the right purchase online.
- MICHAEL: Okay, so we got a new decision now because we need to decide, whether they've already bought offer 2, in which case they now have got both offers, or whether they have never bought offer 2, in which case we need to sell them offer 2. (Laughter)
- NICOLA: Yes, a messy brain I have got now, okay.
- MICHAEL: In fact, go back one moment to the campaign. Delete the connection from the purchase online to offer 2, and put in a blank sequence, and the reason is that we don't want....
- NICOLA: Let's get rid of that as well and then put a blank sequence you say.
- MICHAEL: Yeah, because you want to put a time delay, because you don't want to purchase something and then immediately be sold something else
- NICOLA: No that will be (inaudible 0:55:40).
- MICHAEL: Exactly so we use this blank sequence as a timer delay.
- NICOLA: Okay, God! You figured all this out yourself. Jesus.
- MICHAEL: I try to know.
- NICOLA: How many days do you think?
- MICHAEL: I normally do three to seven, depending on the purchase price
- NICOLA: Three to seven... is low purchase price so let's say three and run on a day of the week. Oh no, we can't get into this that is too complicated. Save and so make it live. Back to the campaign.
- MICHAEL: Okay, so we go from purchase online to untitled sequences or to both offers
- NICOLA: So drag that down till there.

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MICHAEL: Yes. Because if we have got one of those offers, we don't need to put them into a delay sequence, we can just send them straight to whatever happens both offers

NICOLA: Yeah, and so do we need to do the same for this one.

MICHAEL: Not yet.

NICOLA: Okay,

MICHAEL: We go into that decision note and this is going to work exactly the same as the last one, so you have got the 2 rules, untitled sequences and got both offers. So, we are sending to untitled sequences. Untitled sequence is actually going to go to offer 2 ultimately despite delay time.

NICOLA: Hang on a second, so I need to do a three day delay.

MICHAEL: Correct.

NICOLA: Okay, so that's two actions that I can take, they can either go on there, so we need to have a decision note.

MICHAEL: Exactly, so it is a three day delay.

NICOLA: So if the contact has the tag contains the purchase tag on offer 1.

MICHAEL: Yeah or you don't actually need to put this purchase tag.

NICOLA: Okay.

MICHAEL: Because it doesn't really matter if they purchased offer 1 or not, we are only interested if they purchased offer 2 or not.

NICOLA: Because we don't want offer 2, if they have purchased offer 2.

MICHAEL: Exactly, so we actually want a dozen contain tag. It's a lot easier now compared to the previous one because there is now only 2 choices.

NICOLA: If the contact tag doesn't contain offer 2 sequences or offer 2 purchase.

MICHAEL: Exactly.

NICOLA: Okay, cool. Start offer 2 or customer tag perfect online business plan. I could do that later and come back and go through all quietly on my own, after lying down in a dark room. Okay, so they are going into a 3 day delay timer ready to go to offer 2, only if their tags done contain, they have already been through the offer 2 sequences or bought offer 2.

MICHAEL: Exactly.

NICOLA: Yeah.

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- MICHAEL: And then we've got both offers rule is the same as our previous for both offers rule if they finish both of the finished sequence tags.
- NICOLA: Okay, if the contact tags contain finish offer 1 and finish offer 2.
- MICHAEL: Absolutely.
- NICOLA: Okay, cool, right.
- MICHAEL: Okay. So now we need to go.
- NICOLA: Let me just move all this over, so I can make it easier for everyone.

The screenshot displays the Infusionsoft Campaign Builder interface. At the top, there is a green header with the Infusionsoft logo on the left and 'Campaign Builder' on the right. Below the header, there are two buttons: 'Back to Campaign' and 'Purchase online's Decision'. The main content area is divided into two sections, each with a title and a rule configuration box.

**Rules for: 3 Day Delay Timer**

If the Contact's Tags doesn't contain

Prospect Tags -> 2013 - Starts Offer 2 (POBP) x or Customer Tags -> 2013 - Perfect Online Business Plan x

+ AND

+ RULE

**Rules for: Got Both Offers**

If the Contact's Tags contains 2013 - Finish Offer 1 (TBSF Books) x and Prospect Tags -> 2013 - Finish Offer 2 (POBP) x

+ AND

+ RULE

- MICHAEL: Something didn't have to be put on that note.
- NICOLA: Oh, yeah
- MICHAEL: I should have gotten the light green.
- NICOLA: This one here.
- MICHAEL: No, the one which is edited, whenever something is edited it shows up in light green.

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NICOLA: Okay.

MICHAEL: If it stays grey something has to happen.

NICOLA: Okay, well spotted.

MICHAEL: The contact tags don't contain in offer 2 or that is the second product, you can go there. The contact tag can contains that. Its okay. So we need to go from the three day delay timer down to offer 2 now.

NICOLA: Okay and put in another three day delay timer here.

MICHAEL: No.

NICOLA: Oh you mean drag it, connect it.

MICHAEL: Yeah, exactly connect over.

NICOLA: Okay.

MICHAEL: And you can make it clearer if you put the three day delay timer underneath the decision note and purchase online and get both offers over to the right a little bit.

NICOLA: Okay, so let's move that over there and let's move that down there.

MICHAEL: You can see this a little bit clearer.

NICOLA: Okay, so it's now going to all that.

MICHAEL: And if the purchase online the last purchase online.

NICOLA: Let's just move this stuff over.

MICHAEL: After offer 2.

NICOLA: Sorry, just want to move this out the way, cut thatup. So last purchase online of a two, we going to need to put a timer in.

MICHAEL: Well that depends on how you will go with both offers. I would normally have a timer in both offers and their short sequence of this genuine mailing.

NICOLA: Yeah.

MICHAEL: before I move into the next one.

NICOLA: Yeah, well here's my blank sequence delay timer and then my next follow up warm up sequence. Can I just connect?

MICHAEL: You can just connected straight over yeah, That's the easiest and then you put the purchase online into got both offers.

NICOLA: This one here.

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MICHAEL: Yeah.

NICOLA: So they move from this bit first and then they move down through this bit, if they haven't already done that, and then when they finish that, they moved onto this bit and carry on their way.

MICHAEL: Now there is one more connection to do.

NICOLA: Yeah, why is this gray and not green, this one here.

MICHAEL: I think it is because we haven't connected offer 1 to the three day delay or got both offers yet because they may not have purchase it. They may not have achieve this purchase goal.

NICOLA: You have to say this very slowly.

MICHAEL: Okay. So if they could finish offer 1 without a achieving the purchase online, because they may not buy it. Atthe moment we are only moving them on if they bought the product.

NICOLA: Yeah.

MICHAEL: Because the product has to go into the decision note.

NICOLA: Yeah.

MICHAEL: You see.

NICOLA: Yeah.

MICHAEL: You have to also move them if they don't buy the product, so we need to take it from offer 1 straight to the three day delay.

NICOLA: This one here

MICHAEL: Yeah and from offer 1 till they have got both offers.

NICOLA: Oh, my god, so I will get it transcribed and people will be able to use this as a tick list, we will give them the written version so that they look at it as well.

MICHAEL: Okay, so you got another decision, because potentially someone may finish the sequence, without ever purchasing.

NICOLA: And that

MICHAEL: But they still need to move on it, if they haven't bought.

NICOLA: Oh okay. So that as this decision note.

MICHAEL: Exactly. Because the purchase online is a goal that will stop offer 1 sequence, but if that goal is not achieved at the moment offer 1 finishes and then nothing happens.

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NICOLA: Yeah, also I just wanted to try and move it somewhere, it needed to be obvious.

MICHAEL: If you move that higher, put it higher, or the decision notes higher.

NICOLA: Okay, so that's when they purchase online and then if they don't purchase online they are going to decision note, which we now going to set up.

MICHAEL: It's exactly the same as previous one that we did.

NICOLA: So if the contact's tag doesn't contain.

MICHAEL: Doesn't contain.

NICOLA: Finish offer 1. Is that right?

MICHAEL: Yeah.

NICOLA: Or buy offer 1.

MICHAEL: Yeah.

NICOLA: Okay, we have got some bonuses, here we go. So, if we don't finish offer 1, why wouldn't they finish offer 1. I am confused now?.

MICHAEL: I think doesn't contain. I apologies finish offer 2 we are moving them to offer 2.

NICOLA: Okay, alright. So if it doesn't contain oh, let's just

MICHAEL: If you double click we will set up the whole thing, you can just delete.

NICOLA: Okay. So if they don't buy, if they don't go in and finish offer 2.

MICHAEL: Yeah.

NICOLA: Or if they don't buy offer 2.

MICHAEL: Yeah.

NICOLA: Then?

MICHAEL: So, they haven't been through offer 2 or bought offer 2, then they go into the three day delay timer, which will send them to offer 2.

NICOLA: Okay.

MICHAEL: And then they got both offers as well, and we need to do that.

NICOLA: And there is three day delay time that sends them into there.

MICHAEL: Yeah, and then you need to go back into that decision note, put the rules in for if they purchased or finished both offers. Just the bottom section.



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NICOLA: Does it contain?

MICHAEL: Oh no, that is contained. We want to go in there, if they do contain both the finished tags.

NICOLA: Okay.

MICHAEL: Because that means they've either bought or finished.

NICOLA: Yeah, finish offer 1 and or?

MICHAEL: Sorry. They finished or bought either of them.

NICOLA: Finished or bought either of them. So all. No I'm confused.

MICHAEL: So the contact has finished offer 1 and finished offer 2, because they will receive the finished offer tag when they either finished the sequence or their purchase, so we want to finish both of them.

NICOLA: 2.

MICHAEL: Okay.

NICOLA: Back to campaign.

MICHAEL: We all missing something here because I know it should have gone green. I'm going to get both offers, the sequence. Because change it to live from drop. I think that might be it, I'm on my way. There you go. It wasn't live and they were going somewhere that had to be live. Ok, then there is one final step which is from offer to got both offers. Because if they finish offer 2 but don't purchase they don't achieve the purchase goal we still want them to go into both offers. There we go

NICOLA: Well...(laughter)

MICHAEL: And that is the sequence. There is one last step that you could indicate interest on. Shall we go through that quickly? The reason why?

NICOLA: Yes, yes please. Because I want to move people in here but perhaps not yet so I might put a timer in there till I've got time to write the emails.

MICHAEL : Absolutely. So the point of indicating interest is that we're building this sequence now but you've probably already called people who have purchase offer 1 and purchase offer 2. So you don't want them to be sold again. So what we can do is we could move everyone into infusionsoft into a campaign by applying a tag to them which you do from the contacts. You select a list of people and then hit "apply tag". When the tag is applied, we can have that work as indicate interest in campaign to send them into a sequence. So the first thing you need to do is click on the little arrow, might be a double click.

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- NICOLA: Yup.
- MICHAEL: And we are going to change it from “click a link” to if you scroll down, we’ll get “apply tag” and then we can save. So you can see that these indicate interests or goals. They are the same as the purchase goals and when that goal is achieved it will send them to wherever you have told them to go.
- NICOLA: Yeah.
- MICHAEL: Now if we double click on that person with a hand...
- NICOLA: I see search changed to tag there.
- MICHAEL: Yes. So we can actually just use the same tag you use when you go in which is the start of the one sequence.
- NICOLA: Sorry, I don’t understand that. I would have thought I would apply a tag, for example, they have indicated an interest for making money online or..
- MICHAEL: Well if you’d like to do it like that yeah. I was thinking more that if you wanted to drop a load of your leads into it already?
- NICOLA: Yeah.
- MICHAEL: Then you could specifically say that they have indicated interest in this offer, whereas if they have indicated interest in “make money online”, then, that’s a general interest, so you may not want to send them...
- NICOLA: Okay.
- MICHAEL: It’s best in infusionsoft to be very specific so that you can break it down later on.
- NICOLA: So how would I find?
- MICHAEL: You see I would...
- NICOLA: How would I find out if they are interested in the books? How would I get them to raise their hand to say that they are interested in the books?
- MICHAEL: Well you could get them to. There are a variety of ways, you can get them to, in terms of this tag, you could get them, if you send an email out saying, you know, “I have got this kind of stuff”, when they click a link in the email that can apply the tag.
- NICOLA: Uh-huh.
- MICHAEL: The email could be in the warm up sequence, before, but if it’s..
- NICOLA: Okay.
- MICHAEL: So if it is already to people in your list, then you could just send them an

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email and would say “Are you interested? Click this link” and that applies a tag. Alternatively, you could also say I know that everyone in my list has come through this wherefore will be interested. So in contacts...

NICOLA: Yup, yeah. Anyone that has downloaded my report for example, I noticed you have downloaded my report. So I think that you would probably be interested in this - click this link to find out more.

MICHAEL: Yeah, and you don’t actually even have to send the link. You can send them straight into the sales sequence if you want to, because under the contacts of Infusionsoft, you can search for tags. So you can say, I searched for everyone who has downloaded my report and I will then apply the “Start Offer 1” tag. And as soon as that is applied, it will then automatically move them into the sequence because the contact themselves doesn’t have to take the manual action. You can take it for them by applying it to everybody who started, I’ll tell you what, and I will show you the easiest way to show you.

NICOLA: Yeah. I’m just thinking it through, because obviously if they download the report and I put them straight into the offer they are not then going to go through this warm up sequence, are they? So that is not a good idea, is it? You want...

MICHAEL: No, I think, anyone who goes through this warm-up (pause). Anyone who goes through this warm up sequence, you don’t need to worry about anyway because they are already going to be moved in.

NICOLA: Yes.

MICHAEL: Because we have got the decision note that does that for us.

NICOLA: Yes.

MICHAEL: These tags, these indicate interest tags are purely for people who are already on your list.

NICOLA: Okay.

MICHAEL: Nothing else. So only for people who are already on your list who may...who you think may be interested. So that you can start them, i.e., they don’t have to come back through an opt- in form to get through it.

NICOLA: Yeah, yeah.

MICHAEL: You can automatically put them into the sequence.

NICOLA: Yeah. Okay.

MICHAEL: If that makes sense.

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- NICOLA: Yes, it does. So....
- MICHAEL: So, for example, if I joined your list last year and I haven't bought any of your products, but actually, you know I am interested, there is no way I can get to any of these sales sequences because I have gone through this already. I have opted in. I have done everything. So I am never going to see these sales sequences.
- NICOLA: Yeah.
- MICHAEL: So you actually want me to see it and you do that by indicating this interest, which will just drop me straight in.
- NICOLA: Okay. So for example, nurture tags. There we go. There is a few of those. Internet, if someone on my list has got a nurture tag indicating their interest in the internet because they've clicked something that has told me that, then they would go into Offer 1 sequence.
- MICHAEL: Yeah. Exactly and you actually don't need it for Offer 2. However, there is also something that we should talk about here that Infusionsoft tags, which is important to know. When someone has a tag applied to them already, so if people have already got this tag applied to them, they won't be put into the sequence when we publish it. It will only work if it's a new tag.
- NICOLA: Okay.
- MICHAEL: So if they have never had that tag before.
- NICOLA: Okay.
- MICHAEL: So, everyone with the internet marketing tag won't be applied because they have already got that tag. They have to actually have it applied for it to fire off.
- NICOLA: Okay. Right, so that is not going to work then?
- MICHAEL: So that wouldn't be the best way of doing it, but that's why I would suggest using the same "Start Offer" tag because then you have total control. Because you can literally.. we just create at the "Start Offer" tag at the beginning of the sequence. So no one has got that yet.
- NICOLA: Yeah, yeah.
- MICHAEL: So actually you can add that tag to anyone on that list and it is new for them, and that means they will then be added into the sequence.
- NICOLA: So what I should do then is do a search for people who have got the internet interest tag and.....
- MICHAEL: And then apply...

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NICOLA: Start Offer 1

MICHAEL: yeah. So when you do a search on contacts, above your contacts, we can show you. So if you apply your “Start Offer” tag here, and you can save that and you can actually remove the “indicate interest on offer 2”.

NICOLA: Okay, because they...

MICHAEL: Because once they are in Offer 1, they are going to be sent through to Offer 2 anyway.

NICOLA: Yup.

MICHAEL: So now, what you would do is, Infusionsoft contacts, you search for everyone – all contacts with a tag of internet marketing, for example.

NICOLA: Yeah, on making money online or anything like that.

MICHAEL: Yeah, whichever you think are going to be interested, anyone who you want to add into this new sequence. So you just search with any tag idea of whatever it is.

NICOLA: Okay. So let us just say, nurture tags. Oh, here we go. Anyone who has clicked the link to watch the Three Secrets videos which is all about marketing online, or who clicked the link to see this Six Figures article or who clicked the link to see the Seven Steps video or who has said they are interested in logging or internet or laptop millionaire (laughs) or list building, multiple streams of income, yada, yada yada. Recurring income ...see, I told you I was an obsessive compulsive tagger. (Laughs) and so if sequence 1, I can't remember what that is to ...

MICHAEL: It's the best way Infusionsoft. To have tags for everything.

NICOLA: Yeah, absolutely, visited the blog. Okay. What else? They might be employed or self employed. Anyway, whatever I get the picture. I can come back to all that later and sort that out. Okay, so then I just search...

MICHAEL: Then you just search...

NICOLA: Yeah.

MICHAEL: Yeah.

NICOLA: And I'll blur it out

MICHAEL: If you have got action...

NICOLA: Yeah, actions.

MICHAEL: Yeah.

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- NICOLA: Apply tag.
- MICHAEL: And then you do apply tag, and what you would do, don't do it now. But what you would do is you would then choose the "Start Offer" tag.
- NICOLA: Yes.
- MICHAEL: And then save it.
- NICOLA: Yep, and that would apply...
- MICHAEL: and then you hit the process action.
- NICOLA: Okay, nice
- MICHAEL: but I would apply that tag and that's like them indicating their interest so they would then go straight into that Offer 1 sequence.
- NICOLA: Yeah.
- MICHAEL: Obviously, once that has been published.
- NICOLA: Yeah, okay, cool. So I have to write the emails first (laughs). Okay, brilliant. So that's awesome. So is there anything else I need to know about that...So that's a whole, what you call, a segment isn't it? selling segment?
- MICHAEL: Yes, so I call that a selling segment. I will only stick to two or three offers. Sometimes, I put three in. Obviously that makes it, you got another layer of decisions to make.
- NICOLA: (laughs)
- MICHAEL: But 2 is probably the best place to start. But then what I do is send them like you have got here. They go into a blank sequence once they have been through that. So everyone we know that once you have come out of this segment, everyone would have seen Offer 1 and Offer 2.
- NICOLA: Yeah.
- MICHAEL: So everyone has already been sold that. I then move them into a blank sequence, do a bit of a warm up, general emails and then essentially replicate it with the next set of offers.
- NICOLA: Yeah, that's brilliant, and then one thing for me is you know I have got all these people coming from all these different places, and downloading all these different things. But I have no way of streamlining what they got offered in which order and this solves that problem for me.
- MICHAEL: Absolutely, you know exactly how when everyone will get it and no one will be offered the same thing twice. You also know that if they buy it they are not going to continue to get e-mails about it.

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- NICOLA: Yeah, and the other thing is that when they are getting targeted offer e-mails, it's going to be more likely to convert, especially if you get it copy-written properly. It is more like going to convert than if you just drop in text through a warm up e-mail for example. It is more focused, isn't it?
- MICHAEL: Yeah. Absolutely.
- NICOLA: Brilliant. Well, Michael .....
- MICHAEL: We have actually could've pulled up even more if we wanted to as well. But that's for another video.
- NICOLA: I think that is for Infusionsoft masters, that one. Awesome, I mean, thank you so much. What I'm going to do is I'm going to get this transcribed and I will get the recording and the transcription over to you. I really, really appreciate your time. You have obviously got a brain that is wired very differently to mine.
- MICHAEL: That is (laughter) it has been great, we have got it all up and running for you and working as it should be.
- NICOLA: Okay, let me just stop the recording, thank you.