

# Business Automation Checklist

Below is a list of things you could automate with Infusionsoft. The list is organized by feature so you know how to automate that part of your business. This is not meant to be a complete or exact list as many things can be automated using various different features depending on the circumstance.

## Internal Forms

- ☐ Automate your response to phone inquiries
- ☐ Automate your follow up with “walk-ins”
- ☐ Start an automated birthday card campaign
- ☐ Quickly add “affiliate” partners and send them their unique tracking link
- ☐ Trigger the appropriate follow up after a sales call (if you’re not using Opportunity Records)
- ☐ Collect referrals and start follow-up to new referrals
- ☐ Trigger specific SMS follow-up
- ☐ Kick off the sending of a direct mail piece to hot prospects
- ☐ Enter leads from a networking event and trigger specific follow-up
- ☐ Trigger appropriate follow-up after interviewing job candidates
- ☐ Start an appointment reminder sequence
- ☐ Assign leads randomly or specifically to certain sales reps
- ☐ Manually register a contact for an event and trigger a QR code ticket and automated reminders
- ☐ Manage your client fulfillment process

## Opportunity Records

- ☐ Automate your sales pipeline, follow-up, and reporting

## Note Templates

- ☐ Start a collections campaign
- ☐ Instantly respond to common sales objections
- ☐ Remind staff to place a follow up phone call
- ☐ Respond to common client inquiries
- ☐ Start a referral request campaign
- ☐ Trigger an upsell campaign
- ☐ Start a password recovery campaign
- ☐ Grant access to a membership site
- ☐ Stop a marketing sequence without opting the client out of all emails
- ☐ Start customer satisfaction sequence
- ☐ Trigger collection of forms, agreements, or other documents

## Tasks

- ☐ Remind staff to make a follow up phone call
- ☐ Ensure new clients get the attention they deserve
- ☐ Automate customer service tasks
- ☐ Remind staff to contact clients about renewing their contract at the end of the current agreement term

## Fulfillment Lists

- ☐ Automate fulfillment of marketing pieces
- ☐ Trigger automatic sending of products that need to be mailed
- ☐ Automatically send an “unexpected gift” to current clients

# Business Automation Worksheet

Fill out the following worksheet prior to attending the webinar on Thursday, 8th of October 2015, in order to be prepared to get the most out of the webinar and leave knowing exactly how you're going to save at least 2 hours per day using Infusionsoft.

**Make a list of all the things you or your staff do at least 3 times per day:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**Make a list of all of the questions from clients or prospects that you and your staff answer at least 3 times per day:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**How many hours per day do you or your staff spend doing the following:**

Sending follow up emails:	_____	Responding to inquiries:	_____
Sending direct mail:	_____	Sending appt reminders:	_____
Managing sales leads:	_____	Collecting referrals:	_____
Collecting payments:	_____	Data entry:	_____