

## **INFUSION CRM – BENEFITS & FEATURES**

A feature-packed solution is worthless unless the features drive value in the form of cost savings and/or profit. Infusion CRM will do both... quickly. We regularly hear success stories from our customers describing how Infusion CRM cuts costs, makes more revenue, and frees up time.

In an attempt to "make the software real" for you, these are examples of just a handful of benefits that come with Infusion CRM...

**Amazing Client Services** . Each new Infusion CRM customer is assigned a dedicated Account Executive to be the primary point of contact. Their role is to assist new customers through implementation and maintain ongoing customer care relationships. This is done through webinars (online/phone demonstrations), phone consultations with our CRM Experts, a myriad of training videos, and many other resources. During and after implementation, customers have unlimited access to our incredibly responsive fanatical customer support team.

**All the data you need** . At any given time, look up a customer or prospect and see what information he has requested, what he has purchased, what campaigns he received in the past, what he is currently receiving, what web links he has clicked on, what communications you've had with him and much more.

**All-In-One Solution** . No more double, triple, or quadruple keying or exchanging data across different systems. Shopping cart and sales transactions, auto-responders, product information, customer details, order history, payment plans, marketing sequences and responses, lead tracking and progression, and a myriad of other information is tracked in ONE consolidated easy-to-use system.

**Peace Of Mind** . Infusion CRM is a time-tested, ultra-reliable, and highly secure solution. We host the system and your data in one of the top data centers in the world (a Tier 4 facility). Multiple firewalls, encrypted data, nightly onsite & offsite backups, 128-bit encryption, performance monitors, and a secondary back-up facility provide total assurance.

**Anywhere, Anytime Access** . Access Infusion CRM real-time from anywhere in the world. Multi-location businesses, virtual organizations, remote sales members, at-home workers, and vacationers can effectively work and collaborate using the system simply through a web browser.

**Pull ULTRA-TARGETED lists** based on any number of parameters. For example, you may want to send a promotional e-mail or a multi-step sequence that sells Product X to all people in your database who: 1) purchased Product Y; 2) during the past 6 months; 3) attended a seminar; 4) do not belong to your XYZ group; and 5) live in Florida. Point is, the possibilities are virtually endless. Just set the parameters, pull the list and select the desired blast or campaign. The software does the rest.

**Assign and track leads** . You can automatically assign leads to reps, track them through your funnel or pipeline, automatically perform e-mails, tasks and sequences at any point and measure the rate of conversion by company, individual, time period, lead source, etc.

**Processing leads and orders** . Gather leads and orders online or offline and automatically move prospects and customers into and out of Groups and Campaigns. This allows you to automatically charge credit cards, follow-up, automate workflow and fulfillment... all while keeping your lists straight and properly organized. Best of all, it's all done AUTOMATICALLY!

**Tracking communications and interest level** . The system will automatically track everything--e-mails sent & received, faxes sent, direct mail sent, etc. It will also track when prospects or customers click on a trackable link that you create. The system also tracks all incoming e-mails through POP e-mail and automatically attaches the e-mail to the contact record. You can put notes of conversations in the system and you can track all tasks or activities related to your contacts.

**Create as many multi-step sequences as you want** , including steps for direct mail, fax, e-mail, voice broadcasts, and phone calls. The software keeps track of everything--who needs to receive particular marketing pieces and when. Plus, the software automatically sends your faxes, voice broadcasts, e-mails and creates tasks for phone calls that are part of your campaigns. Direct mail pieces are executed by the software using Fulfillment Lists (see below). You can use these multi-step sequences in so many ways, it's scary--order fulfillment, lead follow-up, continuity delivery, teleseminar reminders and more, customer service campaigns, lead warming, and more.

**Fulfillment lists for direct mail** . Here's how it works. The system sends a Fulfillment e-mail to the person responsible for stuffing the envelope. The body of the Fulfillment e-mail contains instructions of what to do (e.g., "Print on goldenrod, with pink testimonial inserts, yellow order form and stamp "2nd Notice"). There are two attachments to the Fulfillment e-mail: the marketing piece that needs to go out that day and an Excel spreadsheet containing the names and addresses of all people who are scheduled to be mailed the piece(s) that day. Your fulfillment person does a Mail Merge to personalize the marketing pieces, prints the pieces and mails them off. (We have a 2-minute online tutorial on doing mail merges if your person doesn't know how to do that.) Your fulfillment person will get an e-mail each day for every different piece that needs to go out that day. You can also provide your direct mail house a special login so they can better manage the jobs they need to fulfill.

**Track your marketing** . You can look at your "Marketing Dashboard" that shows a summary of all marketing activities that have gone out or will go out during a specified date range AND track responses to your marketing.

**Affiliate Management** . Set up affiliates with commission rates and give them unique tracking links. Maintain a ledger of the amount owed to affiliates.

## PRODUCT FEATURES



### **Marketing Campaign Management Software – Infusion CRM**

Create a steady stream of business by putting all of your marketing on auto-pilot! Craft and coordinate multi-step marketing sequences that include email, direct mail, fax, voice broadcast, and tasks and let this powerful marketing system follow-up with your customers and prospects automatically!

- **Marketing Pieces**
  - Create and store various types of Marketing Pieces
  - Marketing Piece Types include e-mail, fax, direct mail, voice broadcast, scripts/phone calls, and tasks
  - Automatically send personalized marketing pieces to a contact or to a group of contacts
- **Marketing Campaigns**
  - Easily build multi-step, multi-media campaigns, auto-responders, funnels, and sequences with unlimited Marketing Pieces and total control over when each piece gets automatically delivered
  - Add and remove contacts to Marketing Campaigns manually or automatically
  - Automatically send out Marketing Campaigns to contacts or contact groups
- **Web Forms**
  - Easily create web forms to post on any web site
  - Link Web Forms to Action Sequences to automatically add the submitter to group(s), campaign(s), auto-assign the lead, and much more
- **Marketing Reporting**
  - View reports on the effectiveness of a particular Marketing Piece
  - View reports on the effectiveness of a particular Marketing Campaign
  - Track responses from Marketing Campaigns--know what Marketing Piece a contact responded to
  - Marketing Dashboard and Success Report—see what pieces are scheduled to go out, which have gone, track results, and more
  - View e-mail blast deliverability, open-rates and click-through rates



## **Sales Force Automation and Lead Management Software – Infusion CRM**

Maximize your direct sales by tracking all of your leads through a fully customizable sales process/pipeline. Setup sales teams, automatically distribute leads, and build automated triggers into your sales process to ensure that your leads are being followed up with appropriately and on time.

### **Sales Management - For Sales Managers**

- Quickly add, edit and search for leads
- Assign leads to your sales reps in bulk or one-off
- Round Robin automated lead distribution
- Set up the sales pipeline by creating Stages and Statuses for your leads
- Set the “Target # of Days” that a rep should allow a lead sit in each stage
- Pull reports on “Stagnant Leads” by sales rep or date range
- View Pipeline reports for the company and individual sales reps
- View Call Log reports to see how many calls made by reps and company

### **Lead Tracking - For Sales Reps**

- Quickly add, edit and search for leads
- Prioritize daily calls and actions using “My Pipeline” which contains the lead lists created by manager
- “Quick Edit” lets you view a lead list and quickly call/edit those leads
- Access contacts, leads and appointments wirelessly through your Internet-enabled phone or PDA



## **Automatic Responder Email Marketing System CRM - Infusion CRM**

Utilize email as an effective tool to manage and market your business. Manage newsletters, auto-responders, and more with our robust email tools. Take advantage of our Email Deliverability Assurance programs that ensure your emails bypass spam filters and get delivered straight into the inbox.

## **Marketing Pieces**

- Create and store various types of Marketing Pieces
- Marketing Piece Types include e-mail, fax, direct mail, voice broadcast, scripts/phone calls, and tasks
- Automatically send personalized marketing pieces to a contact or to a group of contacts

## **Marketing Campaigns**

- Easily build multi-step, multi-media campaigns, auto-responders, funnels, and sequences with unlimited Marketing Pieces and total control over when each piece gets automatically delivered
- Add and remove contacts to Marketing Campaigns manually or automatically
- Automatically send out Marketing Campaigns to contacts or contact groups

## **Web Forms**

- Easily create web forms to post on any web site
- Link Web Forms to Action Sequences to automatically add the submitter to group(s), campaign(s), auto-assign the lead, and much more

## **Marketing Reporting**

- View reports on the effectiveness of a particular Marketing Piece
- View reports on the effectiveness of a particular Marketing Campaign
- Track responses from Marketing Campaigns--know what Marketing Piece a contact responded to
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- View e-mail blast deliverability, open-rates and click-through rates



## Contact Management

Our customer-centric approach to contact management will enable you to track all of your emails, faxes, appointments, tasks and phone correspondences in one place so you can close more sales by maintaining better relationships with your prospects and customers.

### Contacts

- Add, Edit and Search contact information in a powerful customer database
- Store communication details (phone, e-mail, etc.) in the contact's Call Log
- Group similar contacts together for efficient group communications
- Organize Contact Groups into categories
- Track marketing campaign(s) a contact has received and their responses
- Full history of purchases, payment plans, invoices and payments
- Attach documents to a contact's record
- Link multiple contacts to a "Company" or "Account"
- Link contacts together and form relationship "trees"

### Tasks

- Create tasks, prioritize tasks and attach tasks to contact records
- Assign tasks to other users
- Notify other users of task actions
- Calendar--view daily, weekly, monthly views of your tasks, appointments, and meetings

### Other Features

- Calendar – create appointments and events for yourself and other users
- E-mail Client – send and receive e-mail through our integrated e-mail client
- Create and store text and HTML e-mail templates
- Send personalized e-mail templates from any contact's record
- Inbound e-mails get automatically attached to the contact records
- QuickSearch Box--search for contacts from anywhere in the system
- Favorites--save your favorite searches, sites, links and reports for quick access
- User Permissions protect sensitive data and limit access to authorized users
- Communicate with contacts directly from their contact record via e-mail, printed letters, faxes, voice broadcasts, and more



## Affiliate / JV Programs

Create a multi-tiered affiliate structure to manage all of your affiliate needs. An Affiliate Resource Center allows your affiliates to login and view their commissions/referrals, setup tracking links and download information that will help them promote your products and sell more effectively.

- Track affiliate lead and/or sales commissions through unlimited “levels”
- Flexible commission structures--amounts or percentages by product, by specific affiliate, or a combination
- Affiliate tracking center--provide your affiliates and JV partners a place to obtain copy, materials, banners, buttons, other resources, and view their commissions ledger.



## E-Commerce, Shopping Cart & Offline Ordering

A fully integrated shopping cart will allow you to track and process online sales as well as consolidate all of your order in one system. Credit card orders can be charged through our supported list of Merchant Account Gateways as well as Paypal. Coordinate all of your online and offline sales with your marketing campaign, follow up, and more-automatically!

- Fully integrated shopping cart—use your existing storefront or ours!
- Set up products, prices, descriptions, etc.
- Create Web Sales Forms and easily publish them online
- Create products and pricing for recurring sales
- Create orders and track them in the customer’s record
- Process online or offline orders electronically with credit card
- Seamlessly tie to your existing merchant account(s)



## Customer Billing Software – Infusion CRM

View standard sales and accounting reports or setup custom reports to keep tabs on the most important financial information. Automate all of your continuity programs and setup automated campaigns for failed credit cards or other important indicators. Export all of your orders into comma delimited format for integration with accounting-specific programs.

- **Customer-Specific Billing / Accounts Receivable**
  - Create and send invoices; attach them to customer's record
  - Set up automatic credit card charges
  - Set-up and track payment plans
- **Billing Management**
  - View payment history
  - Pull reports; sales totals, sales by product, income, total outstanding receivables
  - Easily re-process and manage failed credit cards
  - Download order information to your accounting system

### TESTIMONIALS

**Infusion CRM** is used by hundreds of organizations across the US, Canada, Europe, and Australia. Clients range from start-ups to well-established organizations and span many different industries. While Infusion CRM is the backbone of many of our client's operations, it also works well to automate a specific function within a large organization too. Below are some of the comments we often hear from our customers.

"We immediately came to the realization that this really is **the** most superior product I've ever seen. Especially given the fact that the cost is very affordable. Most software comparable to this and the support that comes with the software that's comparable to this was four to five times the cost of this system. Now there are other software packages out there that people are touting right now and very few of them really work. It (**Infusion CRM**) works and it's affordable."

**-Bill Glazer, Glazer-Kennedy Inner Circle (GKIC)**

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"As an attorney managing a busy plaintiff's personal injury practice with a complex, multi-step direct response marketing system, I had been on the lookout for software that would help me keep track of everything Bill Glazer and Dan Kennedy have taught me. When I decided to create my own info-product for attorneys (teaching them to do what Dan and Bill have taught me to do) I knew I had to have something that would really allow me to go from "idea to implementation" in a matter of minutes. I looked at the standard off the shelf customer relationship software programs and "sat in" on a couple of webinar demonstrations with the folks at Infusion. There simply was no comparison so, even before our info-product was actually ready, I decided that Infusion CRM was the product I needed.

At first it seems overwhelming... it does so much.. but I quickly discovered that virtually everything you can think of has been "built into" the software so well it was though it was reading my mind! I keep thinking "I wonder if it can do XYZ, " and "viola" it CAN.

It's loaded with help built right in and the support at Infusion has been tremendous. Some of the smartest info marketers I know of are using Infusion CRM and I am happy to join them in enthusiastically recommending Infusion CRM for anyone who would like to "do less" so they can "make more."

**- Ben Glass, Great Legal Marketing**

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"In the last 8 years we have gone through 6 databases at 3 times the cost of Infusion CRM. Not one of them compares to what we can do now. It was like Christmas and the 4th of July when we found out about Infusion CRM! I was actually skeptical in the beginning. I really had given up on finding someone that understood what we needed. But within only a few weeks I knew we had a database that not only does what we expected BUT MORE!! We currently only work out of 1 database, which has cut our admin time in half. We now have more time to work on more campaigns and make more money.

I love your **Infusion CRM** software! I'll tell my friends and anyone else who will listen that they should take a look at this software if they want to automate their sales and marketing. Not only is the software great, but when I have a question, your technical support team is very helpful. Thanks for the great product and the support you offer. I am still in awe of all that Infusion CRM software can do!"

**- Barb Deline, US Tax Marketing, Denver, CO**

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"If you like to play with software, or need only a contact manager, buy Outlook, ACT, or Goldmine. If you want to concentrate on sales and follow-up, take a hard look at **Infusion CRM**. I am willing to bet a steak dinner that you can recover the cost of the software immediately if you simply enter your old mailing list into the database and implement a campaign to bring those folks you have been ignoring back into the fold."

**- Bruce Meiklejohn, President, Mesa Mortgage Corporation, Santa Fe, NM**

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"I've used your CRM software for a long time, but it wasn't until after I watched the tutorials that I really began to understand how powerful the software is. **The tutorials really are VERY helpful!**"

- **Liz Stiles, RHPI, Inc., Fayetteville, NC**

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"My name is Anthony Torres and I work for Joe Polish in Piranha Marketing. I am in charge of actually getting out the marketing campaigns that we send out. Database marketing and having a handle on the database is one of the most crucial areas of your business; however, it is also one of the most frustrating and dull parts of the business. Until we found **Infusion Software**.

Let me tell you, if you would like to eliminate the complexities of sending out a sequenced mailing so it happens virtually automatically without you having to remember or keep a tickler file or any of that nonsense, then **Infusion Software is the way to go**.

If you would finally like to easily be able to segment your list at the touch of a few buttons, then Infusion Software is the way to go. And finally, if you would like to **instantly start making maximum money** from your database, then Infusion Software is definitely the way to go. Let me tell you why.

We spent months and months literally researching many other options out there, including some very, very expensive customized database and CRM programs. What we finally found with **Infusion** and the capabilities that they are able to give us; what they offer us compared to all of the other choices out there, I mean it's incredible.

As you know, most savvy direct marketers out there are master salesmen, very good copy writers, but are not very computer or database savvy. If that describes you as a marketer, then you need to do yourself a favor and **invest in this CRM**. People will think you've become some sort of a database marketing god, because as you well know good copy and good salesmanship is only half the battle. The list that you send it to is vitally important and being able to get a handle on who exactly you are sending this marketing message to, it's a big part of the puzzle.

You need to invest in the software if you want to **start making more money** and saving a lot more money by tightly and accurately focusing your list selection and start making them very specific targeted offers.

Dan Kennedy talks about this a lot. Up until now it is very difficult to do. However, if you're able to do it, it works wonders.

The good part about this is Infusion makes this as simple as pressing a button. **Infusion Software** has made my job 50 times easier and much more effective. I highly recommend them to everyone and of course all of my direct marketing friends that I've already recommended them to.

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Do yourself a favor. Check out **Infusion CRM Software.**"

**- Anthony Torres, Piranha Marketing, Tempe, Arizona**

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"I have purchased your product and must admit it is **unquestionably the best I have seen**. And trust me I have demo'd a ton of products in this category that claim to be the best. Seriously, this program takes the best of CRM, marketing, shopping cart and merchant account software and blends them into a functional command center for my business."

**-Eric Ten Eyck, Dry Clean Club, CA**

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"I primarily use **Infusion CRM** to automate my personal fitness training business. The combination of the software automation, becoming extremely more efficient, 10-11 leads automatically going through my marketing campaign without me having to do a thing, that plus improving my marketing message on my website has literally tripled my business. We went from doing \$10,000 a month in personal fitness to over \$30,000 a month. That's with me doing none of it. The marketing is automatically happening, you don't have to do anything. Payment plans are automatically happening. Also, their **customer service is excellent**. E-mails are being sent from **Infusion** as a follow up to us to make sure we are happy. We acquire testimonials from them. They do everything that you need to do in your business. It does everything I used to do in 20 different ways and it does it automatically, which is the best part."

**- Jesse Cannone, Achieve Fitness, MD**

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"I saw the vision (of what **Infusion CRM** will do) immediately. I had seen what other pains other people have been through – the different databases and systems. I didn't know what to do. I heard your teleseminar and I said that's it, I'm starting right from the bottom up."

**-Maggie Burgisser, Healthy Images LLC, NJ**

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"I heard about **Infusion CRM** while I was attending the Glazer-Kennedy Information Marketing Summit. I wasn't looking for a CRM tool but it was clear both from the demonstrations at the event and the 'big-hitters' that were already using it that this was a serious tool, so I made the decision there and then to sign up and give it a try. Maybe it could organize and automate my information marketing business, I thought. I have been blown away. I had no idea that it would start paying dividends so quickly! **I had recovered the cost within 8 days of installation!**

**It's fantastic!** I used to have leads falling through the cracks everywhere imaginable, but now I am able to stay in touch with those leads and we are turning more and more of them into sales - automatically. The sales flow management feature tells me exactly where every prospect is in the sales process. We are closing several sales every week that I know we would have lost without **Infusion CRM**. It's no coincidence that we are having **record-breaking sales** week after week. Conservatively, **Infusion CRM is adding \$5k a week to our top line**(\$250k this year). I just can't speak highly enough about the system and the quality of service you've given me. I strongly recommend **Infusion CRM** to serious entrepreneurs!"

**-Nigel Botterill, England, UK**  
**2004 Glazer-Kennedy Information Marketer of the Year**

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"I have a team of tax strategy coaches spread across the country. You can imagine the nightmares I have had in the past tying all the data together and staying organizing! I tried several systems over the years, but nothing worked and I had reached a plateau in my growth. I was so excited when I found **Infusion CRM** and learned that I could finally track and manage all of my marketing, leads, sales, and coaches through one system! Plus they provide incredible customer support, and your training videos, frankly, kick the crap out of any other help manual out there! **Infusion CRM** is wonderful! Now, I have all my coaches across the country working out of one secure, web-based system that **automatically tracks the leads and manages them for me**. I have also integrated my online lead generation, teleseminars, affiliate traffic and more. I've even used the software to open a whole new side of my business--I've added e-commerce into everything I'm doing. I'll tell you what, the sky is the limit with **Infusion CRM!** Your software has taken the administrative workload off my shoulders and has freed me up to take my business to the next level. All I can say is, "Thank you!" You guys got it right!"

**-Drew Miles, President PFBS.com, Vero Beach, FL**

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"I love **Infusion CRM** because it ties together **all** aspects of my sales and marketing. I used to use Salesforce.com, but it just didn't offer all of the features and benefits that I get with **Infusion CRM**.

With your product, I can **automatically** charge credit cards, run recurring payments, fulfill orders and provide great customer service. I can **efficiently manage** my sales reps and their leads. And I really like the multi-step follow-up campaigns I can do using e-mail, voice broadcast, fax and direct mail. **The fact that it all runs on auto-pilot is a dream come true.**

**Thank you for creating a fantastic product!"**

**-Matthew Smith Owner, iTime Marketiner, Inc., Davenport, IA**

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"As a new customer, it was very important to me that I had the training resources I needed so I could get started quickly. The training resources that **Infusion Software** made available to me are the best I've ever seen. The resources I had available to me at **CRMQuickStart.com** were exactly what I needed to get myself implemented quickly!"

**-Katerina Chase, John Childers Wealth Academy, Fulton, MS**

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"What **Infusion** has done is given us freedom. I can manage things from my house at the beach, our house in town, or from here. I just go online and just check things. **I can manage my business better.**

You can make all the money in the world and you can be a raving maniac not worried that your business is going to mess up. I'm going to pay any price, any price to make sure I can manage my business and not mess it up."

**-Reed Hoisington, Dan Kennedy Platinum Member, RHPI**

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"I'm an ex kindergarten teacher. It cannot be very complicated for me to figure it out. It is the most **user-friendly** program I have seen anywhere, and I have looked at most stuff out there. **It's incredible. It is so easy to use. I can't imagine my life without the software.**

**-Ann, RHPI**

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"**Infusion CRM** has been an outstanding software core for our integrated system. We've been in the ERP and custom software business for 21 years but I did not have the time or resources to dedicate to developing the system that I needed in-house. I chose to use **Infusion CRM** because it had a huge list of features, all built for automation, and it could be used in a general "API-like" way. It has worked handsomely, allowing us to wrap our customer-facing applications around it and use it for **automated billing, automated core marketing**, and even **affiliate management**. Simply outstanding!"

- Dan Yost, Tri-8 Inc.

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I just wanted to send you a note about your company. Every time I called, I got someone on the phone and my questions were answered. Your company does something that we don't even do well (something we need to do better)...you deliver what you promised. All of the website training has been sent to me like clockwork, just like you said it would be. You have a GREAT company."

- John Lewis, Louisville, KY

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"I have been using the Infusion CRM Program to track and contact our client data base for a month now. I have spoken with the Fanatical Support Reps many times and they have always been 100% supportive, answered every question, and helped me get through any problems that I have had. **They are without a doubt the best Program Support Team that I have ever worked with in the 20 years that I have been using different computer systems.** "

Thanks,

Mike

**Michael P. Negrin**

To view our Product Video Tour please log on to:  
<http://www.SalesForceMaximizer.com>

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