

INFUSIONSOFT CAMPAIGN BUILD CHECKLIST

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This document includes 4 major checklists when launching any Infusionsoft campaign. The 4 phases included here are planning, mapping, pre-launch and post-launch. Each phase has a set of checklists to follow for making sure you do not miss any steps.

Planning

- Define goals and specify KPIs to measure success (ie leads generated, sales, time saved, etc)
- Measure current key performance indicators so there's a benchmark, if applicable
- Identify target launch date

Mapping Process

- Define campaign audience and their pain/problem
- Identify core idea/message of campaign
- Map out user journey with LucidChart, Draw.io (or similar tool)
 - Start at the end goal and work back to identify minor milestones (useful for reporting)
- Identify any 3rd party integrations needed to complete campaign
- Identify if any non-users need to fill out web forms or receive emails on behalf of a contact. (Note: If so, this will rule out internal forms and the use of Owner merge fields.)
- Identify the information you are trying to collect
 - Infusionsoft fields (First Name, Last Name, Email ETC.)
 - What segments (Tags) are you going to be creating?
 - Leadsource tracking if applicable

Pre-Launch

- Identify who is responsible for each asset (emails, landing pages, videos, order forms, etc)
 - Designing & building landing pages
 - Writing emails
 - Build a template or use an existing one.
 - Image usage (All images should have an Alt Text or Description)
 - Proper Email Signatures
 - Proper From selected.
 - Creating the Infusionsoft campaign and structure
 - Use notes in sequences to document important and noteworthy events that occur during the campaign. (Tags are bad for this)
- Test all parts of the campaign
 - Links tested and properly tracked (UTM parameters if applicable)
 - Test purchase of product to ensure proper automation & delivery
 - Any merge fields used are functioning correctly.
- Descriptive labeling for all campaign elements.
- Proper cased campaign labels

- All tags should be categorized and proper cased.
- Where appropriate, sequences should be terminated by a goal.
- Build Infusionsoft dashboard or use 3rd party tool for campaign tracking
- Create video overview of all campaign elements
- Launch

Post Launch

- Measure campaign results against goals and KPIs
- Recap meeting with all stakeholders to identify what went well and/or needs to be changed