Infusionsoft Campaign Planning Chart

Example: This example is for a free video offer campaign. A blank chart can be found on page 2. When collaborating with others to get a campaign launched, it’s helpful to know who is doing what and by when. This chart will help you keep it all organized from a deliverables perspective so you can launch your campaign on time with all of the required resources. Step numbers are arbitrary. The important thing is to sequentially list the steps and the timing of each one.

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| --- | --- | --- | --- | --- | --- |
| **Step #** | **Step Description (describes action taken)** | **Design work**  **(what/when/who)** | **Copywriting**  **(what/when/who)** | **Misc Items (what/when/who)** | **Infusionsoft work**  **(what/when/who)** |
| **#1a** | Fill out web form | Brand logo/Jun 15 /Debbie | Thank you page text/Jun 15/Jenn | Video file links/Jun 15/Cara | Create web form/Jun 18/Lori |
| **#1b** | Apply a Form Submitted tag | N/A | N/A | N/A | Add tag and tag process/Jun 18/Lori |
| **#2** | Email video link immediately | N/A | Email #1/Jun 15/Jenn | N/A | Add email/Jun 18/Lori |
| **#3a** | Wait 24 hrs and if they don’t click video link – send reminder email #1 after | N/A | Reminder Email #1/ Jun 16/Greg | N/A | Add email/Jun 18/Lori |
| **#3b** | Wait another 2 days and if they don’t click video link – send reminder email #2 | N/A | Reminder Email #2/ Jun 16/Greg | N/A | Add email/Jun 18/Lori |
| **#4** | When they do click video link – wait 15 mins then send follow up offer | N/A | Email #2b/Jun 16/Greg | N/A | Add email/Jun 18/Lori |
| **#5** | Wait 24 hrs and if they don’t respond to offer – add to short-term nurture campaign | N/A | N/A | N/A | Add process/Jun 18/Lori |
| **#6a** | Accepts offer | Offer page/Jun 16/ Debbie  Upsell page/Jun 17/ Debbie | Offer page/Jun 16/ Jenn  Upsell page/Jun 17/ Jenn | N/A | Create products, promos & order forms /Jun 18/ Lori |
| **#6b** | Email order confirmation | N/A | N/A | N/A | Add email/Jun 18/Lori |
| **#6c** | Order Fulfillment | N/A | N/A | Fulfillment process/ Jun 17/ Cara | Add Fulfillment process  /Jun 18/Lori |
| **#6d** | Tag as New Customer | N/A | N/A | N/A | Create tag and add process/Jun 18/Lori |
| **#6e** | Wait 7 days and follow up with customer to make sure product was received. | N/A | Follow up email/Jun 17/Greg | N/A | Add email/Jun 18/Lori |
| **#6f** | Wait 10 days and send satisfaction survey | Banner image/Jun 17  /Debbie | N/A | Questions for survey/Jun 17/ Cara | Create and test form/  Jun 18/Lori |

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Campaign Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Proposed Launch Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **#1** |  |  |  |  |  |
| **#1a** |  |  |  |  |  |
| **#2** |  |  |  |  |  |
| **#3a** |  |  |  |  |  |
| **#3b** |  |  |  |  |  |
| **#4** |  |  |  |  |  |
| **#5** |  |  |  |  |  |
| **#6** |  |  |  |  |  |
| **#6a** |  |  |  |  |  |
| **#6b** |  |  |  |  |  |
| **#6b** |  |  |  |  |  |
| **#6c** |  |  |  |  |  |
| **#6d** |  |  |  |  |  |