



Work Smarter, Not Harder: SharpSpring Professional Services

Add to your revenue stream by utilizing SharpSpring staff as an on-demand extension of your team.



Robbie Smart

Professional Services Manager | SharpSpring



Bryan Tobin

Product Expert | SharpSpring

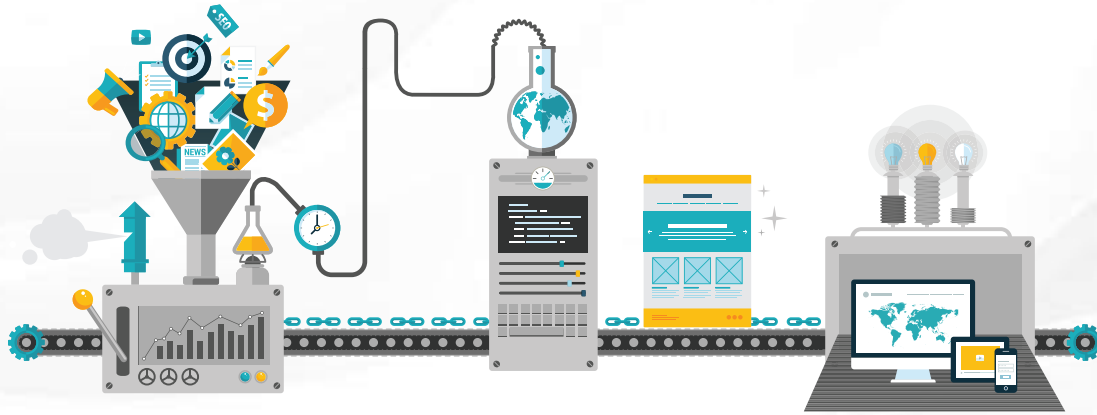
Greetings

Who's In The Audience

- SharpSpring Partner Agencies

Why Are We Here?

- Learn how you can leverage our Professional Services at your agency
 - Review the types of services we provide
 - Discuss pricing for each service



Housekeeping

Questions?

- Phone lines are muted
- Submit via:
 - Chat Box

Webinar Recording & Slides

- Emailed after webinar

Webinar Survey

- We need your feedback

Upcoming SpringBoard Live – Partners Only:

Say It Ain't Spam! Enhance Your Sender Status

Friday, June 23

More Bang For Your Buck: Shopping Cart Overview

Friday, June 30

Future Partner Presenters:

Email Koertni Adams at

koertni.adams@sharpspring.com

Introductions



Robbie Smart

Professional Services Manager | SharpSpring

As SharpSpring Professional Services Manager, Robbie is responsible for helping partner agencies meet their marketing automation needs as well as the needs of their clients.



Bryan Tobin

Product Expert | SharpSpring

As a Product Expert, Bryan is responsible for creating content to help users get the most out of SharpSpring. This includes maintaining the support forum and creating instructional “how to” videos.



SharpSpring | Professional Services

Import & Sync

1. CRM Migration
2. Salesforce Integration
3. Client Migration

HTML & CSS

1. Email Coding
2. Dynamic Email
3. Form Styling
4. Dynamic Web Content

Automation

1. Tasks and Workflows
2. Lead Scoring
3. Dynamic Lists

Development

1. API
2. 3rd party integrations
3. Shopping cart

Client Training

1. Onboarding
2. App areas
3. Deep dives

On-site Training

1. On-location app training
2. All-day expert advice
3. Onboarding



Powerful. Affordable.
Marketing Automation.

Import Sync Starting at \$75/hour

- Importing contacts only
 - \$75 per hour
- Migrating clients from another agency
 - \$250 per client migration
- Migrating data from any CRM
 - Starting at \$1,000





Powerful. Affordable.
Marketing Automation.

HTML & CSS

\$75/hour

- Custom email templates
- Dynamic email and web content
- Form styling

First Name *

Last Name *

Company Name *

Email *

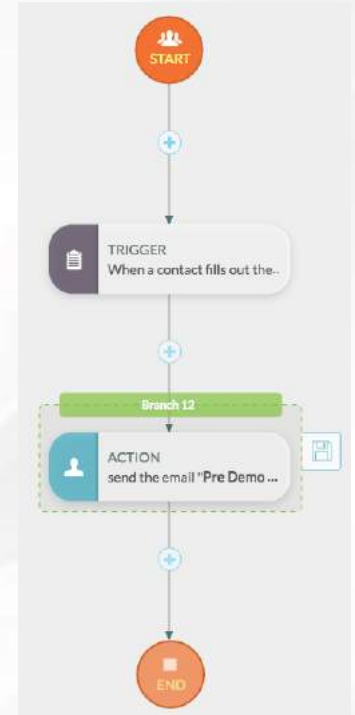
[Register Now](#)



Powerful. Affordable.
Marketing Automation.

Automation \$75/hour

- Custom nurture campaigns
 - Tasks and workflow configuration
- Dynamic lists
 - Lead segmentation
- Lead scoring configuration





Powerful. Affordable.
Marketing Automation.

Development \$250/hour

- Custom integrations with API*
 - 3rd party integration
- Shopping cart integration
 - eCommerce

```
<div class="commentHolder">
  {{#each comment }}
  <p class="date">{{this.date}}</p>
  <p style="color:#fff;" class="comments {{this.public}}">{{this.comment}}</p>
</div>
{{/each}}
</div>
<div class="row">

<center>

<div class="response">
  <h2>You are reviewing <u>{{agent}}</u>'s Case</h2>
  <p>{{email}}</p>
  <p>Case #: <a href="https://sharpspring.zendesk.com/agent/tickets/{{case}}" target="_blank"
  style="color:#82C340">{{case}}</a></p>

  <form class="reviewForm" action="/reviewed" method="post">
  <fieldset id="userinfo">
```

*If the 3rd party has an open API


Client Training

\$100 per session

- New client onboarding
- New client employee training
- Advanced client training workshops

Single training: \$100 per session
Training package: 13 sessions for \$1,000

Contact Manager & CRM

 **Attendees:** Key Team Members, Sales


- ✓ **Call Objectives:** Review the processes for creating and managing contacts, using SharpSpring Personas, and the functionality of the sales & opportunities dashboard.

Form Creation & Integration

 **Attendees:** Key Team Members

- ✓ **Call Objectives:** Easily create and style customized forms with the SharpSpring Form tool, or work with your Onboarding Specialist to integrate with the third-party forms you currently use.

Email Functionality & Media

 **Attendees:** Key Team Members, Content Creators

- ✓ **Call Objectives:** A step-by-step walkthrough of creating, editing, and sending trackable emails and media within SharpSpring.

Landing Pages & Blogs

 **Attendees:** Key Team Members, Content Creators


- ✓ **Call Objectives:** Review the process and best practices for creating single landing pages, designing landing page funnels, and publishing blogs in SharpSpring.

Automations & Lists

 **Attendees:** Key Team Members

- ✓ **Call Objectives:** Learn how to create, modify and test automation tasks, workflows and lists. Review basic automations, segmentations, and best practices.

Analytics, Tracking & Reports

 **Attendees:** Key Team Members

- ✓ **Call Objectives:** Review SharpSpring's various reporting functionalities, and learn how to create unique tracking for specific marketing initiatives.

Creating a Marketing Campaign

 **Attendees:** Key Team Members, Marketing

- ✓ **Call Objectives:** Work with your Onboarding Specialist to create a personalized marketing strategy that makes use of a variety of tools within the application.

Dynamic Content Overview

 **Attendees:** Key Team Members, Marketing

- ✓ **Call Objectives:** Learn how to create content personalized to each contact with the dynamic functionality of our email and landing page tools.

Advanced Automation Strategy

 **Attendees:** Key Team Members

- ✓ **Call Objectives:** Review internal vs. external automation, trends & concepts in marketing automation, and strategies for automating additional processes.

SharpSpring API *

 **Attendees:** SharpSpring Support, Agency Developer(s)

- ✓ **Call Objectives:** Review the capabilities of the SharpSpring Open API to connect your third-party application to our internal CRM.

CRM Migration

 **Attendees:** SharpSpring Support, Partner Resource

- ✓ **Call Objectives:** Review data configuration and formatting requirements for a successful CRM migration. Work directly with our team to complete migration.

Shopping Cart

 **Attendees:** SharpSpring Support, Agency Developer(s)

- ✓ **Call Objectives:** An overview and setup of SharpSpring's Shopping Cart Integration functionality. Requires connecting to an external shopping cart tool.

**If the 3rd party has an open API*

On-site Training Starting at \$1,500

- On-location training and onboarding*
 - 2-3 day workshops
- SharpSpring Workshops
 - Visit Gainesville, FL for private training

**\$1,500 per day up to 3 days
2 day minimum**










Powerful. Affordable.
Marketing Automation.

On-site Training Our Competition

- HubSpot
 - \$15,000 for two days
- InfusionSoft
 - \$10,000 per person
- Marketo
 - \$8,000 one-time fee



-  Import & Sync
-  HTML & CSS
-  Automation
-  Development
-  Client & on-site training

Why choose us?



Why do agencies choose our Professional Services?



Starting at \$75/hour

Extend your team and add to your revenue stream.



Support is 100% free

We're happy to provide guidance and talk you through any process.



Competitive pricing

Wholesale prices gives you plenty of room for markup in line with your rates.



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Questions?

Continue the Conversation

With Robbie:



Robbie Smart
Professional Services Manager
SharpSpring

Email: proservices@sharpspring.com

With Bryan:



Bryan Tobin
Product Expert
SharpSpring

Email: bryan@sharpspring.com



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