Granting Enfusen CRM/ List Access & Marketing Automation Platform Access

Before your Second Intake Call, you will need to provide Enfusen a master list of all your contacts or share access into your CRM.

There are a few ways to do this.

1. Send CRM access to your Client Success Manager. They will do the rest of the work!
2. Export your contact list from your CRM and send the document to your Client Success Manager.

What to include in your contact list (*needed)

1. First & Last Name*
2. Email*
3. Company Name*
4. Job Title*
5. Date added into your CRM*
6. All other contact properties will be extremely helpful

Why does Enfusen need access to my contacts?

Enfusen will segment the contacts on your master list according to your Buyer Persona to find your top 1,000 most qualified contacts. If you wish to filter down your contacts before sending to Enfusen, that is fine as well. Enfusen will run the 1,000 most qualified contacts through our lead intelligence.
(For additional contacts there will be an additional cost of .25/ contact)

Your contact list of 1,000 will then be uploaded to your SharpSpring Marketing Automation Account and will be used for email marketing, lead scoring, and interaction tracking of your website and current offers.

Let’s start turning those leads into customers!

Marketing Automation Access

Before your Second Intake Call, you will need to provide Enfusen access to your marketing automation platform (if you are currently using a marketing automation platform). Please send your CSM account login information to your individual platform.

Why does Enfusen need my access to my marketing automation platform?

As a part of this program, granting Enfusen access to your marketing automation platform is vital to the Launch of your funnel and marketing automation strategy.

We will be building your landing page funnels and email marketing automation out inside of your platform.

Let your Client Success Manager know if you have any questions!