Optional Growth Services & Customization

ADVISOR RESOURCES / 08 - GROWTH SERVICES

A practical reference for requesting advisor-specific InfusionOS customizations and separately managed cold email or LinkedIn outreach services.

1 At a Glance

Your standard InfusionOS membership provides the configured platform and its included resources. The services described here are optional, separately priced engagements. They are not included in the standard membership or standard platform support.

Offering	What InfusionOS provides	How pricing works
Advisor-specific customization	Scoped changes or new custom marketing and platform assets	Individual project quote
Managed cold email outreach	Strategy, technical setup, campaign execution, ongoing management and optimization	One-time setup fee + ongoing management fee
Managed LinkedIn outreach	Targeting strategy, approved outreach configuration, execution, ongoing management and optimization	One-time setup fee + ongoing management fee

To inquire about any service, email support@infusionos.com with a description of your objectives. The team reviews feasibility, scope, requirements and pricing and provides a proposal before work begins.

2 Advisor-Specific Customization

Custom work can extend the standard InfusionOS configuration when a practice has a specific, well-defined need. Typical requests include:

- Landing page revisions or additional advisor-specific landing pages, including tailored messaging and offers.
- Custom lead magnets, including new educational guides or related downloadable resources.
- Custom assessment development or requested changes beyond the standard Exit Readiness Assessment.
- Other advisor-specific digital asset, workflow or platform enhancements, subject to technical feasibility and platform permissions.

Each request is assessed individually. InfusionOS will identify deliverables, responsibilities, review cycles, estimated timing and a separate project fee in writing. Some requests may not be technically practical or appropriate under the controlled InfusionOS platform structure.

Important: Externally used copy, landing pages, lead magnets, assessments and other materials require any approval mandated by the advisor's firm before publication or distribution. Platform customization does not give advisors unrestricted editing access to compliance-controlled assets.

3 Managed Cold Email Outreach

This is a separately contracted outbound campaign service. InfusionOS manages the campaign infrastructure, strategy, configuration, execution, monitoring and ongoing optimization. The advisor supplies the prospect data and required accounts, owns the resulting relationships and personally handles replies.

Advisor requirements

- Provide a prospect list that is already clean, deduplicated and email-verified. InfusionOS does not source, clean, deduplicate or verify the addresses.
- Ensure the prospect list was obtained and will be used lawfully, with all applicable firm authorizations and required suppression information. Verification of an address does not establish permission or guarantee deliverability.
- Purchase, own and maintain dedicated sending domains and email accounts separate from the advisor's primary business email infrastructure.
- Provide authorized domain registrar, DNS and relevant mailbox administration access for initial configuration. Delegated access is preferred over sharing primary passwords.
- Purchase and maintain subscriptions for the third-party outreach platform and any other required infrastructure selected by InfusionOS.
- Review the proposed campaign and messaging, obtain any required firm compliance approvals, and authorize launch in writing.

Domains, mailboxes and campaign scale

The number of sending domains and mailboxes is determined during scoping. It varies with prospect-list size, anticipated sending volume, sending timeline and applicable technical or deliverability limits. Sending resources may require configuration and a gradual ramp-up before full campaign activity. InfusionOS will specify the infrastructure requirements; the advisor bears the related domain, mailbox and software costs.

List acceptance and campaign readiness

InfusionOS may check whether files are structured for import and may segment an acceptable list according to the campaign plan. These activities do not include list cleaning, deduplication, enrichment or email verification. If the supplied list does not meet the agreed requirements, campaign setup pauses until the advisor corrects and resubmits it. Advisor-caused delays are addressed in the written service agreement.

InfusionOS management responsibilities

- Develop and configure the approved campaign strategy and outreach messaging.
- Configure sending infrastructure and the selected outreach platform, using authorized account access.
- Execute, monitor, adjust and optimize the campaign within applicable law, provider requirements and approved messaging.
- Maintain appropriate unsubscribe, do-not-contact and suppression handling for the campaign.
- Use the third-party platform's built-in analytics to assess performance; separate monthly InfusionOS reports are not included.

Advisor responsibilities after launch

Campaign replies and inquiries go to the advisor through the relevant sending inbox or third-party platform. The advisor responds personally, assesses interest, manages conversations and schedules any discovery calls. InfusionOS does not serve as the advisor's sales representative or reply-handling service.

4 Managed LinkedIn Outreach

This service is intended to help advisors identify and engage relevant professional contacts and develop their networks. It is not a promise of a particular number of leads, appointments or transactions.

Advisor requirements

- Maintain an active LinkedIn Sales Navigator subscription for prospect identification and use of the available targeting filters.
- Purchase and maintain any additional third-party software selected by InfusionOS for the approved outreach process.
- Provide necessary authorized access to supported tools, and obtain required firm approvals for strategy and messages before launch.
- Personally respond to connection requests, direct messages and expressions of interest, and manage subsequent professional relationships.

InfusionOS service scope and boundaries

InfusionOS develops targeting criteria, configures the approved outreach approach, and manages ongoing execution and optimization using supported tools. Prospect identification through Sales Navigator does not imply unrestricted permission to export data, scrape profiles or automate actions. Any outreach process must comply with LinkedIn's current platform terms, applicable law and the advisor's firm policies. If a proposed method is not permitted, it will not be used.

The advisor can view activity and performance in the relevant third-party software dashboards. InfusionOS does not provide a separate monthly performance report as part of this service.

5 Fees, Timing and Service Terms

Item	Advisor-specific customization	Managed outreach (both types)
Initial fee	Project fee quoted individually	One-time setup fee
Ongoing fee	Only if specified in the custom proposal	Recurring management and optimization fee
Third-party costs	If required by the custom project	Advisor-funded software subscriptions; cold email also requires domains and mailboxes
Minimum engagement	Per individual proposal	Six months from official campaign launch
After initial term	Per individual proposal	Continues month-to-month
Cancellation	Per individual proposal	30 days' written notice after minimum term

The six-month outreach commitment and recurring management fee begin when the campaign officially launches. The setup fee covers initial preparation and configuration. Subscriptions, domains and mailboxes remain the advisor's responsibility and may have independent vendor terms. All pricing and billing provisions are governed by the signed service agreement.

6 Compliance, Permissions and Limitations

- Firm approval: The advisor is responsible for obtaining required firm compliance approval and providing written authorization before campaign launch. Subsequent changes that require new approvals must follow the firm's policies.
- Cold email: Campaigns must meet applicable email-marketing, privacy, identification, opt-out and suppression requirements. A purchased or verified list does not by itself establish compliance.
- LinkedIn: Campaign activity must follow LinkedIn's applicable terms, including restrictions on prohibited automation and data collection. Use of third-party software does not override these rules.
- No guarantees: InfusionOS does not promise response rates, lead volume, appointments, revenue, deliverability, account standing or business outcomes.
- Technical dependencies: Service availability depends on selected vendors, access permissions, data quality, platform changes and appropriate approvals.
- Advisor-owned relationships: Advisors remain responsible for their professional interactions and timely follow-up. Integration of external replies into InfusionOS is not guaranteed unless expressly included in the proposal.

7 Requesting a Proposal

1. Email support@infusionos.com and identify the customization or outreach service you want to explore.
2. Briefly describe your objectives, intended audience, existing assets or tools, and preferred timing.
3. InfusionOS reviews feasibility, service requirements, advisor responsibilities and the proposed scope.
4. You receive a proposal detailing the work, any setup and recurring fees, required outside subscriptions or infrastructure, and applicable terms.
5. Work begins only after the scope is accepted and the required access, materials and approvals are in place.

8 Quick Reference Checklist

- ☐ I understand that optional services are not part of my standard InfusionOS membership.
- ☐ For customization, I can describe the required changes or new deliverables.
- ☐ For cold email, I can provide a lawful, clean, deduplicated and verified prospect list and fund dedicated sending infrastructure.
- ☐ For LinkedIn outreach, I can maintain Sales Navigator and other required approved tools.
- ☐ I understand the separate setup, recurring management and third-party costs of outreach.
- ☐ I understand the six-month initial term, month-to-month continuation and 30-day written cancellation notice.
- ☐ I will obtain required compliance approvals and personally handle all prospect replies.

Questions or service requests: support@infusionos.com

This guide describes current service practices for educational purposes and is not a legal opinion or a substitute for the signed service proposal or agreement, applicable law, provider terms, or firm compliance requirements.