



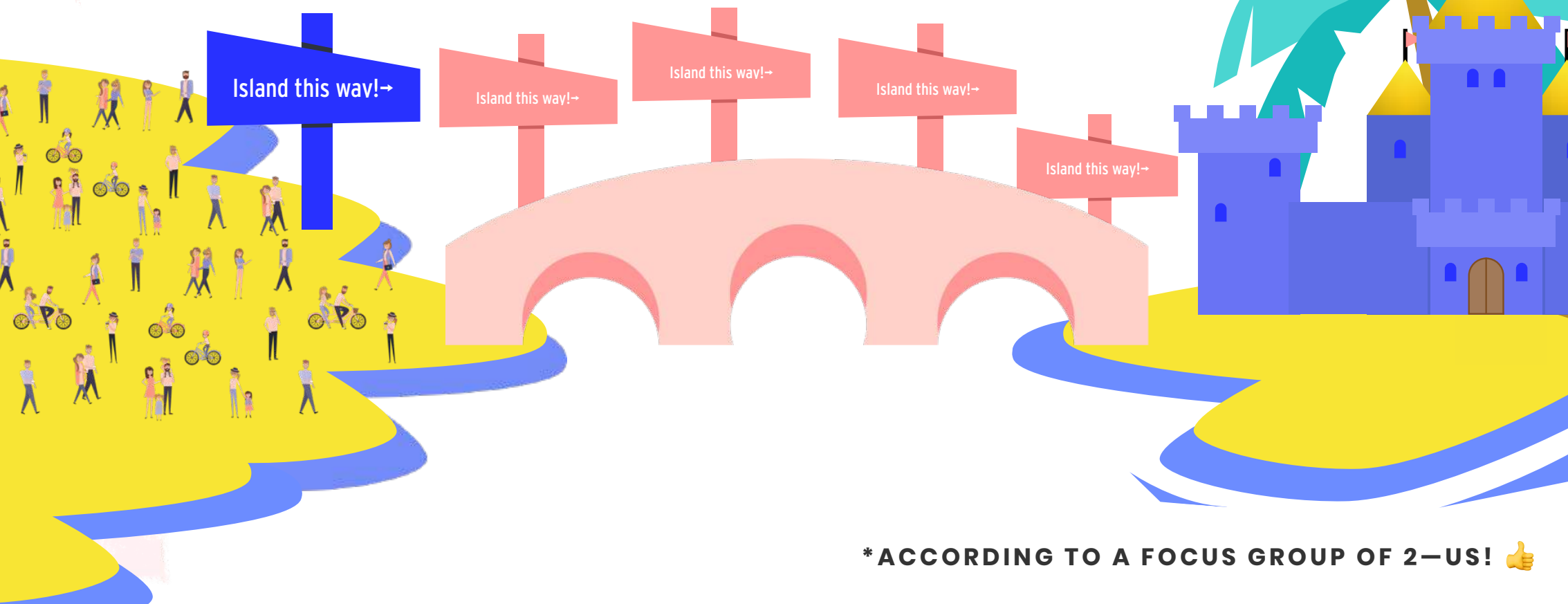
Un-boring

Group Coaching Workbook

Building Your Marketing Bridge



IT'S THE COOLEST CLUB ON THE INTERNET!*



*ACCORDING TO A FOCUS GROUP OF 2-US! 🍌

Will this be the month that you **COMMIT** to making progress in your business?

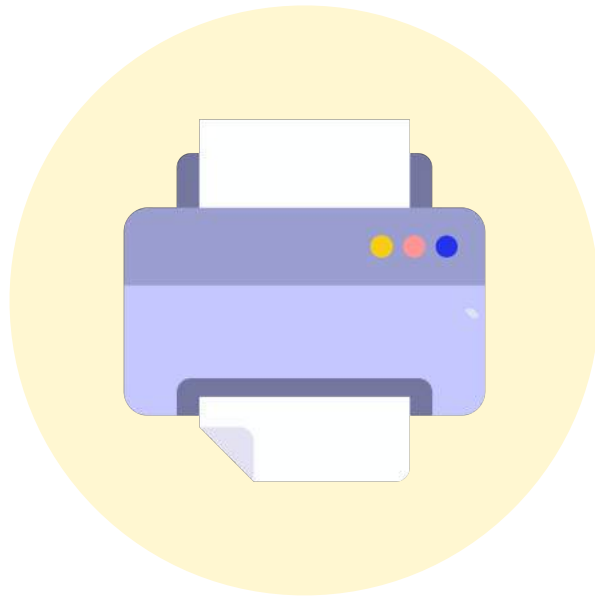
WE SURE HOPE SO!

This workbook was created so that you would
TAKE ACTION on what you're learning. You no
longer have the excuse of "I don't know what to
do next" because this thing is FULL of step-by-
step checklists and ways for you to put these
marketing concepts into motion.

WE LAUGH IN THE FACE OF INACTION!

Let's go!





Ps. Just a note if you want to print this puppy out. If you couldn't tell, we love COLOR. However, for the exercise pages we did our best to keep things printer-friendly. We recommend using the Printer Settings to select only the pages you plan to write on (for example, no need to print all 13 marketing blueprints or the divider pages.)



Your Commitment Contract



I, _____,

WRITE YOUR NAME HERE!

commit to show up for this coaching session with presence and enthusiasm. I promise this workbook will not be another PDF collecting dust on my desktop. I will either print this out right now and have it ready before I watch the Coaching Session OR I will open it in my app of choice and use it during and after the Coaching Session.

Also, my favorite emoji right now is:

YOU MUST CHOOSE!



SIGN HERE!



Session Notes

Writing it down helps you retain information

Follow Along

Fill in the blanks according to what we share with you during the session.

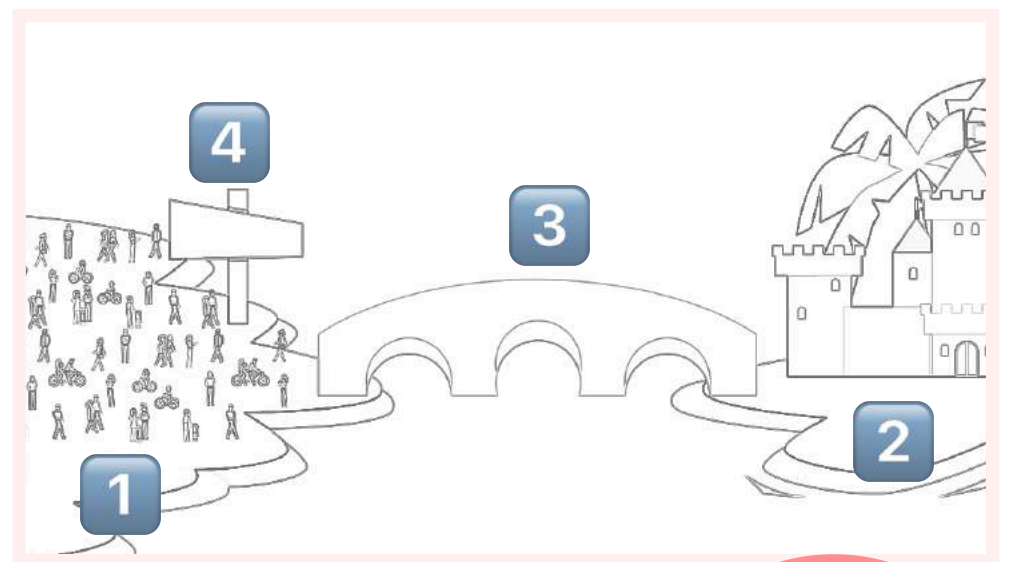
INTRO

Marketing is the broad term referring to anything that _____ your _____ to your _____.

STORY TIME

The 4 Pieces:

- 1 The Mainland = _____
- 2 The Castle = _____
- 3 The Bridge = _____
- 4 The Billboards = _____



IMPORTANT PIECE #1: YOUR CASTLE 🏰

Questions to make sure you're offering is 🙌:

- Does your offering look _____ and welcoming?
- Is your sales page _____? Is the buy button easy to find?
- Is your sales page messaging _____? Does your sales page directly speak to who your ideal audience is, what their pain points are?
- Does the _____ of your offering match with the kind of person you're welcoming and the look of your offering?

How do you know if your offering is solid? You need _____ and people to actually go through your product.

Psst...it's printer-friendly! Bonus: Feel free to bust out the colored pencils for adult coloring time!



IMPORTANT PIECE #2: YOUR AUDIENCE 🧑🧑🧑

If you try to talk to EVERYONE, your efforts are going to get diluted very fast. Carve out a very specific [redacted] of everyone so you can speak directly to them and their needs.

Defining your ideal audience:

- It's crucial to come back to this exercise MANY times throughout the life of your business
- As you evolve, and as your business evolves, your [redacted] should evolve too
- The more [redacted] you go, the easier to speak to your audience
- Ask yourself: "What kind of person [redacted]?"

How well do you know your audience:




- What's their basic [redacted] info? Age, maybe location, occupation, financial status?
- What's their biggest [redacted] related to your business?
- What are the dreams and aspirations they have for their life? What [redacted] are they looking for?
- What are the things that could [redacted] from working with you or buying your offering?

IMPORTANT PIECE #3: MARKETING BRIDGE

3 things that build a strong marketing bridge:

1. Clear, memorable 
2. An obvious and gradual  to cross the bridge
3. Multiple touch points to build 

Strong Marketing Bridge Tip #1: Clear, memorable messaging

- Make your ideal customer the  of your brand story.
- Define a compelling  that will make their life better, and then make that clear throughout your marketing copy.
- Make sure you know your “”—the two-word description of what you do and what mental box for customers to put you in.

Strong Marketing Bridge Tip #2: An obvious and gradual step-by-step path to cross the bridge

You can't simply ask someone from the mainland to buy your product right away. You have to lead them down your bridge with

 !



IMPORTANT PIECE #3: MARKETING BRIDGE (CONT'D)

Strong Marketing Bridge Tip #2: An obvious and gradual step-by-step path to cross the bridge (Cont'd)

- Don't try going for [redacted] before you invite your customer out for a drink.
- Make sure every marketing tactic has a clear [redacted] (guidepost) to continue the journey.
- Put yourself in the shoes of your customer as they journey down the bridge. What do they need to get closer to [redacted] your offering?

Strong Marketing Bridge Tip #3: Your marketing bridge needs to be sprinkled with ✨ trust dust.

Someone has to trust you to [redacted].

3 ways to reinforce trust:

- 1 [redacted]
- 2 [redacted]
- 3 [redacted]



IMPORTANT PIECE #3: MARKETING BRIDGE (CONT'D)

The 3 mistakes people make with their marketing bridges:

- Mistake #1: The Lonely [redacted] - There's no marketing bridge to get someone from the mainland into your sequential trust-building sequence.
- Mistake #2: [redacted] Only - The only content you share about your offering is that A) it's something people should buy and B) here's another post/mention to purchase from you
- Mistake #3: No [redacted] - You don't have enough helpful pieces of content on the mainland.

IMPORTANT PIECE #4: BILLBOARDS 📌

[redacted] is likely how you are going to get people to your marketing bridge in the first place.

The simplest content strategy is the one that [redacted] !

When it comes to creating content, like everything else, you need to have an [redacted] .

Create content where [redacted] .

Social media sites are great places to create content on, but that content HAS to lead to [redacted] .

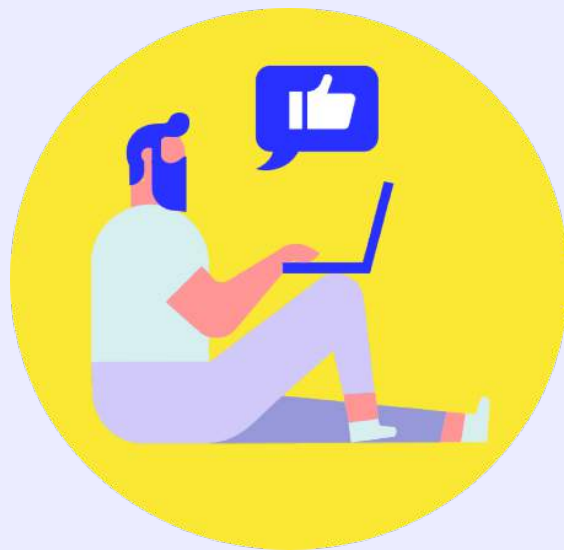


IMPORTANT PIECE #4: BILLBOARDS (CONT'D)

Having less very [redacted] content (still imperfect) is way better than a ton of crappy content that doesn't help at all.

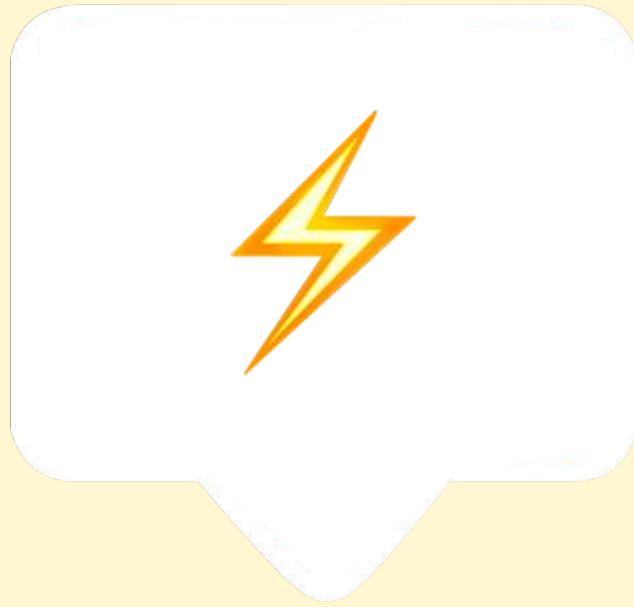
CONCLUSION

If you aren't getting enough clients or sales... go through the four pieces of this puzzle and [redacted].



Loving this workbook?

Feel free to screenshot a page or two and share on social media (be sure to tag us!) We take a lot of time and effort into making this resource extremely valuable (and pretty!) and we hope you'll consider spreading the word to your business owner friends if you think **Un-Boring Group Coaching** might be a good fit for them!

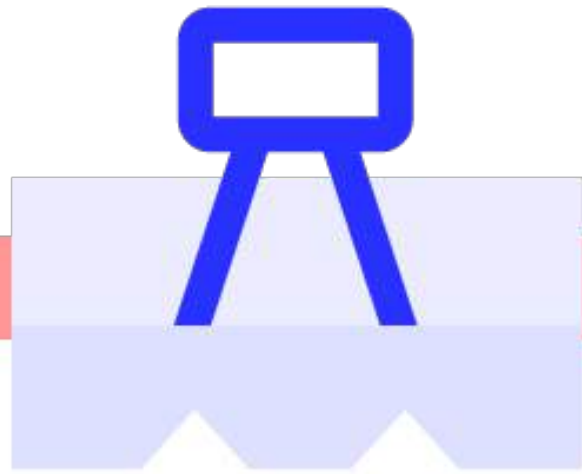


Action Plan


Strategy is nothing without execution

Action Plan Steps

This list will tell you EXACTLY how to put what you learned into action and what pages of this workbook are associated with each step!



- ☐ Evaluate all 4 pieces of your marketing puzzle and **look for improvements** ([pg 15](#))



 Action Booster: Ask a WAIMER to review your 4 pieces 🤔 and make sure they're clear

- ☐ **Choose a marketing bridge blueprint** to experiment with each month going forward ([pg 16](#))

- ☐ Refer to the **blueprint checklists** for tasks associated with each blueprint ([pgs 17-37](#))

- ☐ Use the **marketing calendar** to write WHEN you plan to experiment with each tactic ([pg 38](#))

- ☐ Fill in your own **two-week action plan** with the tasks you need to complete to make your first improvements along with WHEN you'll complete them ([pg 39](#))

 Action Booster: Try Marketing Mondays! Put 1 hour on your calendar  every Monday to spend on marketing efforts.

- ☐ At the start of each month, use our “**Experiment Sheets**” to record a goal, and write down the results ([pg 40](#))

Exercise: The 4 Pieces

CASTLE/OFFERING 🏰

How's your offering? Use the checklist and space to write any ideas for improvements.

- ☐ Does your offering look professional and welcoming?
- ☐ Is your sales page easy to find? Is the buy button easy to find?
- ☐ Does your sales page clearly speak to who your ideal audience is, what their pain points are?
- ☐ Does the price of your offering match with the kind of person you're welcoming and the look of the castle?

MAINLAND/IDEAL AUDIENCE 🧑🧑🧑

Who is your ideal audience? Use the checklist and space to write any ideas for improvements.

- ☐ Do you know who (specifically) on the mainland you're trying to attract to your island?
- ☐ Do you know where they spend the majority of their time (IG, YouTube, Pinterest, FB, etc)?
- ☐ Do you know what problems they need help solving and where they go to solve those problems?
- ☐ What would make their life easier and how can you be their solution?

BRIDGE/MARKETING STRATEGY 🌉

How strong is your marketing strategy and bridge? Use the checklist and space to write any ideas for improvements.

- ☐ Do you have clear, memorable messaging that speaks to the heart of your audience at every step of your bridge?
- ☐ Do you have clear guideposts that will lead your audience down your bridge?
- ☐ Is your marketing bridge opt-in compelling enough to get someone to sign up and start crossing your bridge?
- ☐ Is your bridge sprinkled with plenty of trust dust?



























BILLBOARDS/CONTENT 📣

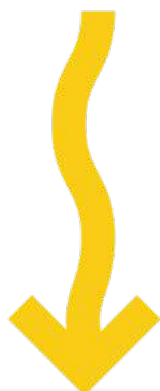
How is your content? Use the checklist and space to write any ideas for improvements.

- ☐ What billboards do you have posted on the Mainland leading people to your marketing bridge?
- ☐ Where and how are people finding you as they go about their digital lives?
- ☐ Is your content trying to get someone to marry you right away? Do you need to slow down and put up more guideposts?
- ☐ Does no one even read your content? Maybe you need to think about paid acquisition or partnering with people who have existing audiences.

Marketing Blueprints

Table of Content

1.  <u>The "Newsletter" Blueprint</u>	 17
2.  <u>The "Consultation" Blueprint</u>	 18
3.  <u>The "Lead Magnet" Blueprint</u>	 19
4.  <u>The "Email Course" Blueprint</u>	 20
5.  <u>The "Epic Post to E-Book" Blueprint</u>	 22
6.  <u>The "Fly On The Wall" Blueprint</u>	 24
7.  <u>The "Quiz" Blueprint</u>	 26
8.  <u>The "Partnership" Blueprint</u>	 28
9.  <u>The "Group Challenge" Blueprint</u>	 29
10.  <u>The "Workshop" Blueprint</u>	 30
11.  <u>The "Video Series" Blueprint</u>	 34
12.  <u>The "Free Trial" Blueprint</u>	 36
13.  <u>The "Cool Microsite" Blueprint</u>	 37



Marketing Checklist: Email Newsletter Blueprint



- ☐ Create the newsletter form in your email provider
- ☐ Customize your opt-in confirmation email (if you use double-opt in)
- ☐ Setup an automation for when someone subscribes that they get your Welcome Email (is it triggered by a tag or what?)
- ☐ Make sure that when someone subscribes whatever tag you use or List you add the subscriber to is the one you'll be sending weekly emails to
- ☐ Write a Welcome Email with helpful content introducing yourself
- ☐ Add your opt-in form in multiple places on your website

Include compelling sign-up text (what problem will your emails solve for someone, do not say "get my email updates")

Keep your email opt-in near or above the fold if at all possible (as well as in the footer for easy access)

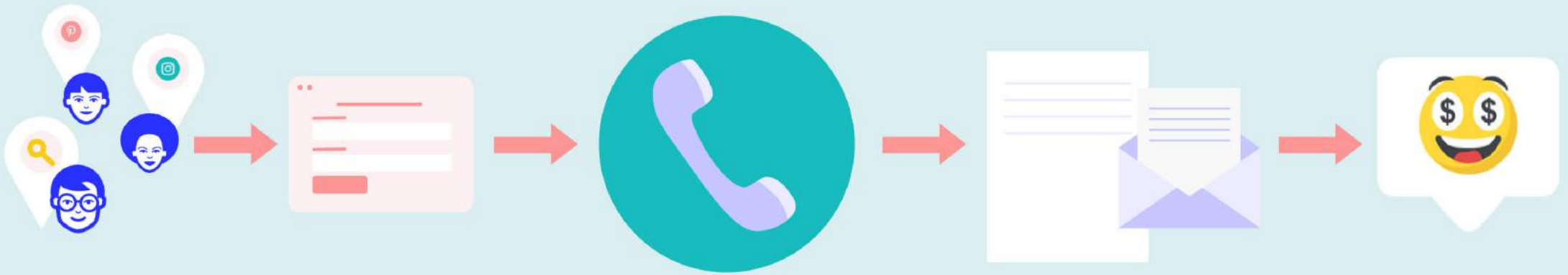
- ☐ Create an email template that has simple branding and is easily readable on multiple devices (send yourself a test email of the template and view on multiple devices!)
- ☐ Start sending weekly emails using your email template to your subscribers!
- ☐ At some point, pitch your offering to your subscribers
- ☐ Bonus points: Create a content calendar for your weekly emails and get ahead of your schedule so you aren't writing emails last minute

Oh, you fancy! 🍷

- ☐ If you're fancy, you can create an email sequence for your Welcome Email (this is great if you want to send more than one email)
- ☐ If you're EXTRA fancy, think about adding a 1-time AWESOME promo code and link to your offering in your Welcome Email (this email has the highest open rate of ANY email you will ever send)
- ☐ If you don't want to add a promo code, consider adding the question, "What are you struggling with in your XYZ?" and ask people to reply (a great way to find future email topics AND help your subscribers if you can!)

Marketing Checklist: Consultation Blueprint

TRAFFIC → TO CONTACT FORM → TO PHONE CALL → TO PROPOSAL/FOLLOW-UP → TO SALE!



- ☐ Signup for a service like Calendly, Acuity Scheduling, etc to create a nice calendar consultation call booking service
- ☐ Create a “Free Consultation” or “Free Intro Call” page on your site (add simple copy of what the call will cover and what they can expect)

Embed the calendar scheduling form on this page

- ☐ Add a button in your main navigation to the Free Call page
- ☐ Add a button in your footer to the Free Call page
- ☐ Use Zoom or Skype to host the Free Call (and kick ass on the call!)

- ☐ Write a couple follow-up email templates to send after the call

Email #1: How are you going to help the person after the call?

Email #2: Is there an offering you discussed on the call you can soft pitch?

Email #3: Sell your offering and how it solves their problem? Ask if they have any questions you can answer.

Email #4: Provide them with any solutions to their problem if they aren't interested in buying at this time

- ☐ Create a consult call spreadsheet where you keep track of your calls and how they go, perform, and if people buy via certain emails

Create columns for Name, Company, Date of Call, Main Problem, Emails #1, #2, #3, #4 (mark when these are sent), and if they purchased

Oh, you fancy! 🍷

- ☐ If you're fancy, add the Free Call button to any articles on your site that have the most traffic AND are relevant to your offering
- ☐ Add them to your email newsletter (if you have one and if they agree to be added) to continue sending them updates and info

Marketing Checklist: Lead Magnet Blueprint



- ☐ Put together a PDF, checklist, or how-to guide that will help your potential customer with a topic related to your offering

You can do this for free and simply using Google Docs, Slides, PowerPoint, or Keynote and export the lead magnet as a PDF

Use SmallPDF.com to compress your PDF so it's not a humongous file!

Host your PDF file on your website, in Google Drive, or in DropBox and create a bit.ly link for the PDF (this will give you some analytics on amount of downloads of it!)

Recommendation: Use a free service like Attract.io (created by a WAIM Member!) if you want lead magnet templates you can easily create!

- ☐ If you don't already have email opt-in forms on your website, refer to Blueprint #1 (Newsletter) for tips and create one!
- ☐ If you DO have email opt-in forms on your website, edit any of your existing copy to include a callout to get your lead magnet upon signing up

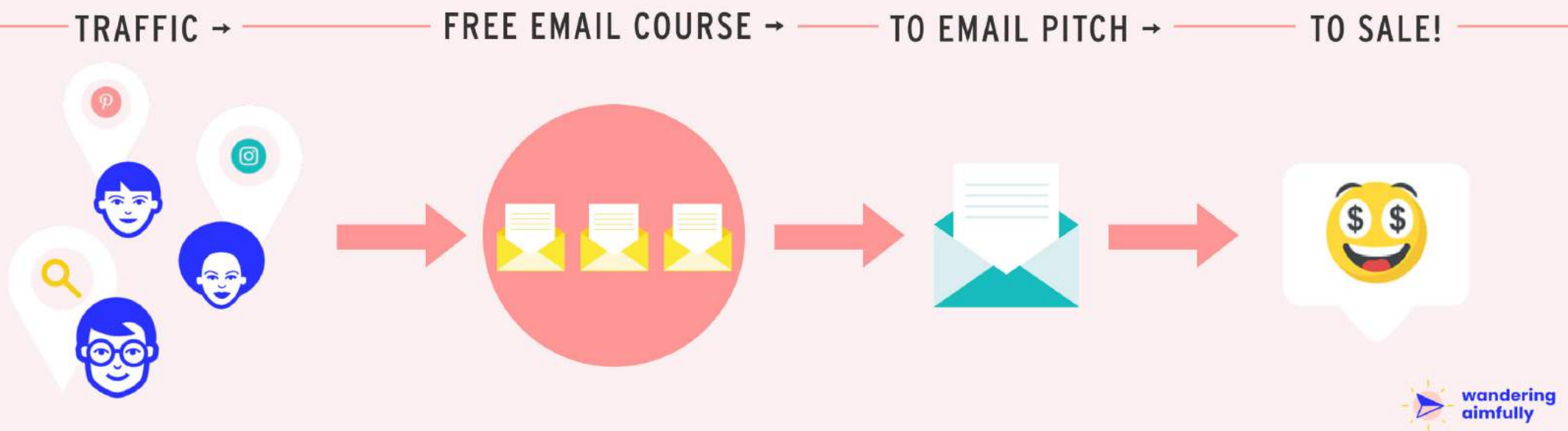
The lead magnet should solve a problem, so don't just say "Download my PDF" say something around "Stop struggling with X, get my 30 tips to overcome Y today!"

- ☐ For ease of delivery, include your lead magnet PDF in your Welcome Email once someone signs up for your emails
- ☐ Once on your email list, continue sending helpful emails and eventually a pitch to buy your offering!

Oh, you fancy! 🖋️

- ☐ If you're fancy, you may want to create a generic lead magnet for your site (especially on your homepage and a specific landing page for the lead magnet) AND create specific lead magnets if you have articles/videos/podcast episodes that could benefit from a lead magnet of their own.
- ☐ Have a lead magnet on a landing page that you only use for social media promotion. This is a great way to see what type of long-tail ROI you can gain from sites like Twitter, IG, FB, etc.

Marketing Checklist: Email Course Blueprint



- ☐ Open up your writing app of choice (Google Docs works wonders) and write out 5 bullet points that are tips, ideas, or ways you can help your potential customer around your offering

- ☐ For each bullet point, write out an email that explains the bullet point more in-depth and has:

A relatable story someone can feel connected to

An explanation of your tip/idea/strategy that isn't overwhelming

An action item to take based on the tip/idea/strategy today

- ☐ You should have an email template created from Blueprint #1 (Newsletter), but if not, create a simple one

- ☐ In your email provider, create a new automated email sequence, workflow, or automation (whatever your provider calls them) - this is your email course!

- ☐ Add your 5 emails to your email sequence

If it feels right, add a subtle sales pitch at the bottom of each email for your offering

If it feels even more right, consider adding a promo code or discount in the first email or two that is a limited-time offer

- ☐ Go back to your Google Doc (or whatever writing app you used) and write 3 more emails which will all be sales emails for your offering

Sales Email #1: What is the problem your offering solves for your customer? What is the transformation your product will help them make in their life? What emotional change will happen for them by purchasing your offering. Then pitch your offering and link to your sales page.

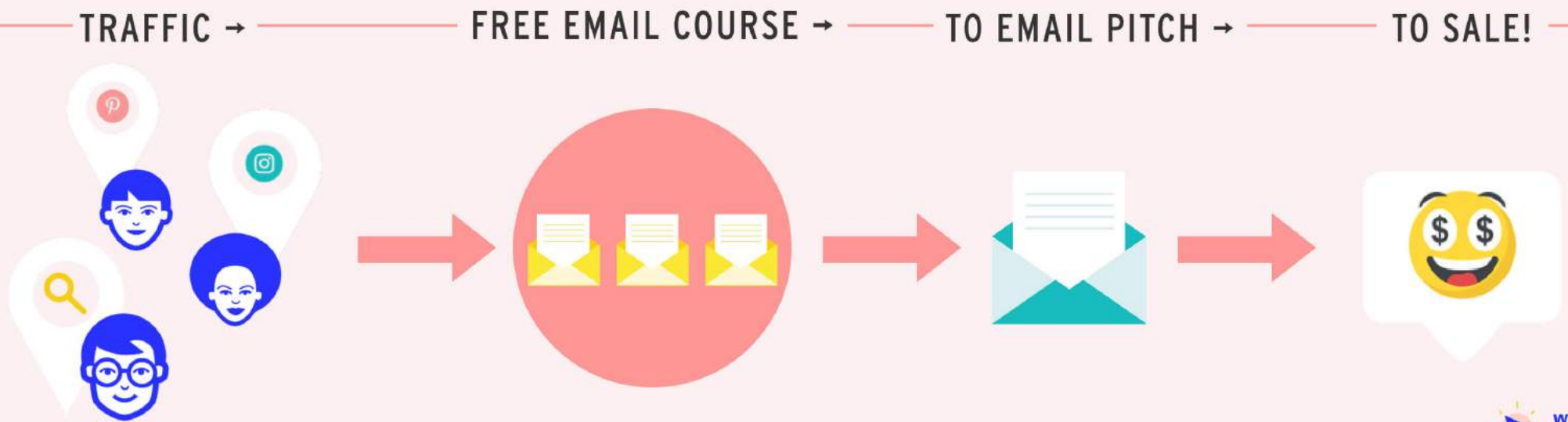
Sales Email #2: Share social proof (case studies) of people who've used your offering and had results. If you don't have this yet, you need to get it before writing these emails. Pitch how your offering will do the same for the subscriber.

Sales Email #3: If you're using a discount or bonus, this is a great email to remind someone of that while also reminding them of the profound change your offering will make in their life. If you are not offering a discount, remind them of the profound change and go through the specific features of your offering.

- ☐ Head back into your email provider and add your 3 sales emails on the end of your email course. You now have 5 helpful emails that lead into 3 sales emails!

Continued on the next page!

Marketing Checklist: Email Course Blueprint



- ☐ Much like blueprint #3 (Lead Magnet) you want to add compelling copy to promote your free email course on your email opt-in forms on your website.
- ☐ Make sure that you thoroughly test how someone gets added to the email course (via tags, forms, automation triggers, etc).
- ☐ Set up an automation where at the end of the email course, your subscriber gets added to your main list where you can email them consistently going forward.

Oh, you fancy! 🎉

- ☐ Create a landing page on your website just for the free email course. Remember to talk about the benefits the email course will offer and the problems it will solve.

Marketing Checklist: Epic Post to E-book Blueprint



When it comes to writing an Epic Post, research and patience are your friends.

- ☐ Your Epic Post should be around a keyword or a key phrase (example: “Marketing Ideas” or “Logo Design Tips”). Pick your keyword or key phrase and do a Google search, looking through the top 10 articles.

- ☐ What points do these articles make that you agree with? Write them down.

- ☐ What points do these articles miss that you think need to be shared? Write those down.

- ☐ What is missing from the top 10 articles that you can to your Epic Post? Is it supporting graphics? Helpful short videos? Walk-through checklists? Or something else entirely?

- ☐ Close down the 10 articles and write down what unique experience, stories, and perspective you have on the keyword/key phrase topic.

- ☐ Open up your writing app of choice and write a bulleted list that will become the Table of Contents for the Epic Post.

What are the MAIN topics someone needs to know that will become the section headings as someone reads through the post.

- ☐ For each bulleted item, write everything you need to support that part of the post, then move on to the next bullet.
- ☐ Write an Introduction to lead into the topic, clearly identifying a problem that the Epic Post will solve.
- ☐ Write a Conclusion that summarizes the article and gives someone the next steps to take to solve their problem.
- ☐ Create any supporting visual elements, videos, or other pieces of content that can take the post from good to EPIC!
- ☐ Get your Epic Post to a solid First Draft stage and then pass it along to a couple people interested in your topic that can give you feedback.

Ask them questions: What is missing? What wasn't clear? What really stood out?

Continued on the next page!

Marketing Checklist: Epic Post to E-book Blueprint



- ☐ Take the feedback and work on your article to create a solid Second Draft.
- ☐ Once you have a Second Draft, find a copyeditor to help go through the Epic Post and make sure it's easy to read, it's free from typos/grammar errors, and good to go.
- ☐ Add the copy-edited Epic Post into your website as an article and start the fun of formatting it to be easy to read...
 - ☐ Make sure the headings for the sections throughout are easy to spot (usually using H2 tags).
 - ☐ Have a Table of Contents that gives the reader an easy place to see what sections they may want to jump to or can get ready for.
 - ☐ Add your supporting graphics, videos, etc.

Oh, you fancy! 🍷

- ☐ If you're fancy, you could bring Blueprint #4 (Email Course) in here as well, when someone downloads the e-book you could send them an Email Course based on the Epic Post topic, pulling helpful content from that post and repurposing it as actionable/helpful emails with a pitch to buy your offering.

- ☐ To write a great title for your Epic Post, go back to your initial search results of the Top 10 articles and see where your article fits into the mix.

Use terms like “The Definitive Guide to...” or “An In-Depth Guide on...”

Analyze your title using a free tool like <https://coschedule.com/headline-analyzer>

- ☐ Once your Epic Post has been fully formatted, it's time to turn it into an e-book.

If you can't create an e-book on your own, use a free tool like <https://www.printfriendly.com/>

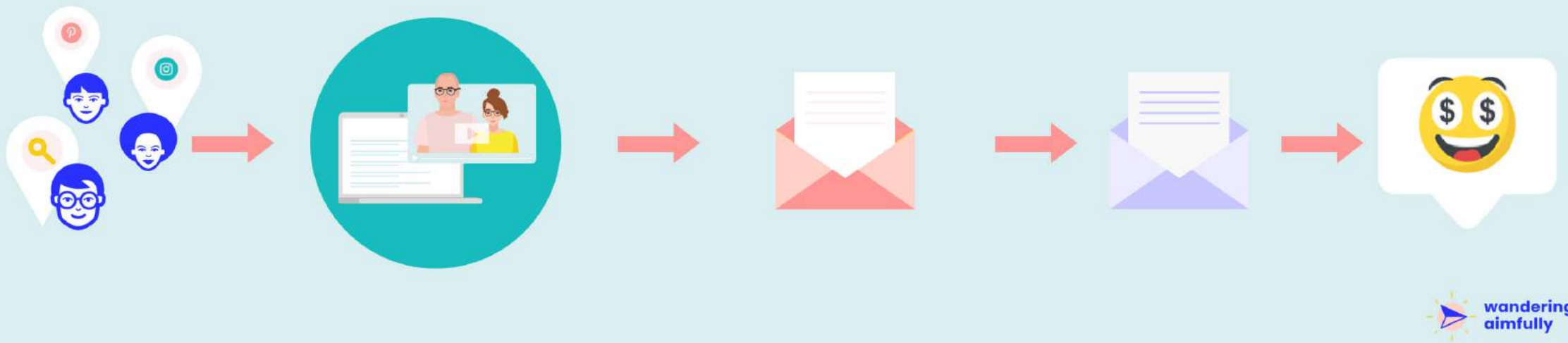
If you can create an e-book, give your Epic Post some design love and make it look awesome (then export as a PDF).

Bonus Tip: Make sure to include a pitch to your offering in the e-book. You can do this in the middle as well as at the end.

- ☐ Host the PDF (e-book) of your Epic Post on your website or in Google Drive or Dropbox. Use the same strategy from Blueprint #3 (Lead Magnet) to add the E-Book as a downloadable item in exchange for their email address.
- ☐ Once someone downloads the e-book, they get added to your email newsletter!

Marketing Checklist: Fly On The Wall Blueprint

TRAFFIC → TO PROJECT CONTENT → TO EMAIL UPDATES → TO EMAIL PITCH → TO SALE!



- ☐ **Decide on a project you can build in public**
- ☐ **Decide on the content platform you're going to deliver your updates through (blog posts, videos, podcast episodes, etc.)**
- ☐ **Whichever of these you choose, you'll want to also be sending email updates to alert your audience when you have a new update so create a plan for these updates**

As an example, let's say you are redesigning your website and want to share the process for 6 weeks

You're going to create screen-recording videos and share them on YouTube of you working/designing/making decisions

You're going to have ONE blog post on your website where you add daily-ish updates about the project (embedding the videos in the post as well)

Your plan is to email your audience every Friday with that week's update for the duration of the 6 weeks

- ☐ **Create the blog post you'll be updating**
 - ☐ **Add a Table of Contents so they can jump around to various updates much like Blueprint #5 (Epic Post)**

We like to also put a link to the most recent update at the top (see the Fancy box for more on this!)

- ☐ **Write an introduction to the project with what people can expect to get from you as far as updates and content**

- ☐ **IMPORTANT: Add an email opt-in to the introduction section where people can be alerted of your next update about the project. Remember to add a compelling line of copy with the email form**

- ☐ **Don't forget to do all the email things from Blueprint #1 (Newsletter) here: Like a Welcome Email, tagging, any automations, etc.**

- ☐ **As you write daily-ish updates you want to have some message at the very bottom of your update post about when the next update is coming so people know when to come back**

Example: "Next update to this project will be Wednesday at Noon PT where I'll share the logo exploration process I go through!"

- ☐ **This is another great opportunity to add your email opt-in form so folks don't miss any updates**

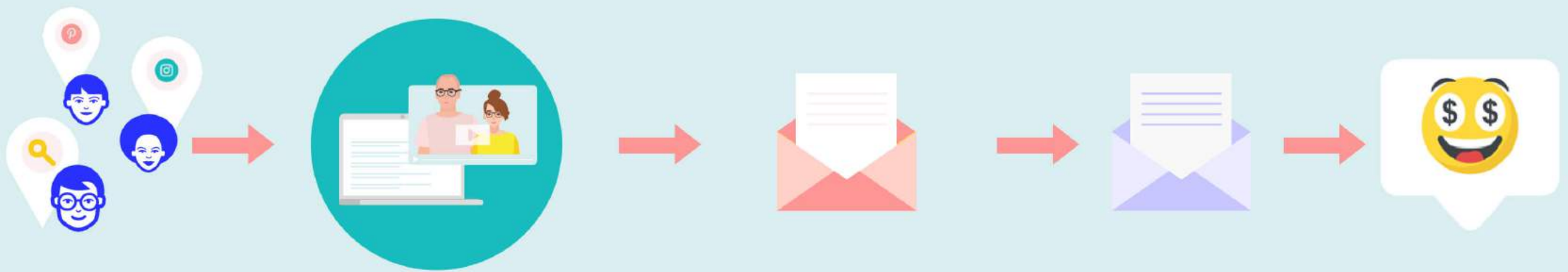
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Oh, you fancy! 🖍️

- ☐ **If you're fancy, adding a link to your most recent update is as simple as adding a link to "#mostrecent" to a line of text in the blog post and then at the bottom of the post where you write the most recent update, you insert the anchor link of **

Marketing Checklist: Fly On The Wall Blueprint

— TRAFFIC → — TO PROJECT CONTENT → — TO EMAIL UPDATES → — TO EMAIL PITCH → — TO SALE! —



- ☐ We recommend creating some sort of content calendar when doing the “Fly on the Wall” blueprint so you know a schedule for your content updates and you can stay on track and hopefully on-time with your project AND your public updates

- ☐ Use Google Sheets, Airtable, Trello, whatever productivity app works best for you and simply list out all the key dates for the duration of your project (and what updates will be added when)

- ☐ Create a row in the sheet with something simple like “POSTED YES/NO?” and check that off with every update

- ☐ Then, do the work and share it! Remember that you’re taking people behind the curtain so you want to share a bit more than just the actual work...

How are you feeling about the project? What struggles are you facing AND how are you overcoming them?

What tricks/tactics/processes do you use that seem simple to you but might be mind-blowing for people watching you (share these!)

Photos of you at work go a long way to create a connection with your viewers!

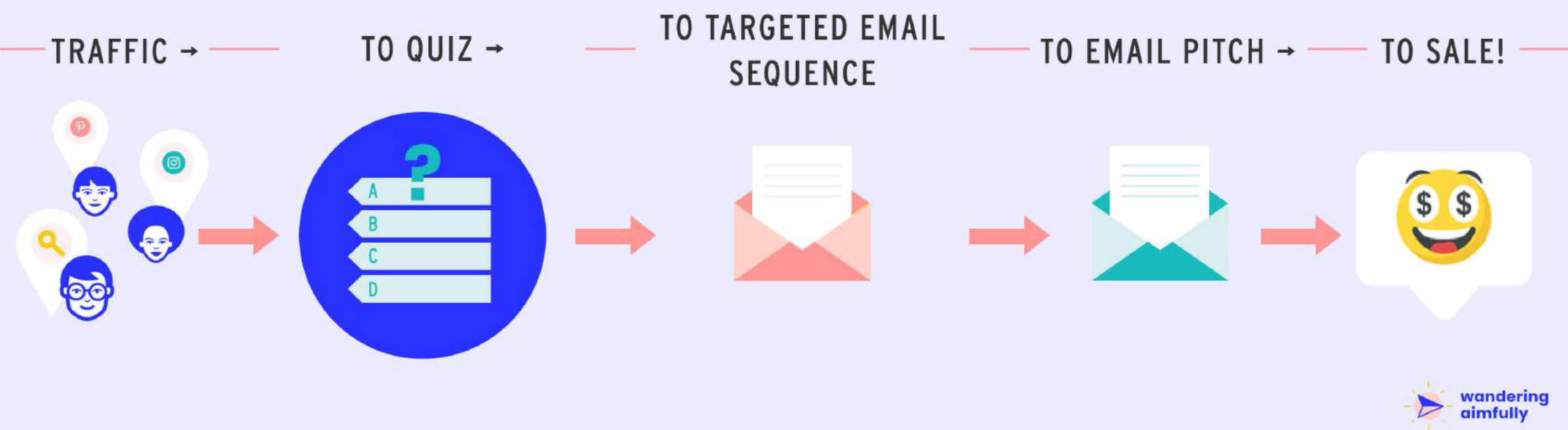
- ☐ Keep your updates coming and make sure to carve out time to write and send your update emails

- ☐ When you finish the project itself, make sure to write a nice conclusion on the post (or a final video)

This is a great place to have a call to action to learn more about your offering!

- ☐ Enjoy the growth of your email list and keep communicating with your new subscribers much like you would with Blueprint #1 (Newsletter)

Marketing Checklist: Quiz Blueprint



A great quiz starts with the outcomes you can give your subscriber/potential customer. You want to work backwards from the results to the questions of your quiz.

- ☐ Start by opening up a Google Doc and writing out 3 specific problems you can help your ideal customer solve with processes or strategies you already have

Ex Problem #1: We have time management processes that we've honed over the years to help work more productively (time journal, time blocks, hotel metaphor)

Ex Problem #2: We have money strategies that have helped us get control of our cashflow and pay down debt quickly (ETAC, Cashflow exercise, debt payoff plan)

Ex Problem #3: We have specific tactics that help us land clients based on sales processes (sales spreadsheet, follow-ups, writing better sales emails)

- ☐ Now, write down what the actual results of your quiz will be.

Pretend you just took a Cosmo quiz or a personality test online. Can you cleverly name the "buckets" that someone will fall into after taking the quiz?

- ☐ Once you have the outcomes/results written down, think of the questions you can ask someone to find out if those are their problems?

What are they struggling with the most? What do they want more of in their life that they don't have now? How do they see themselves? Pro tip: Sneak in a few questions as research so you can learn more about your email subscribers. What do they consider their occupation? Or why did they start xyz in the first place?

- ☐ Now that you have your questions listed out and the outcomes they lead to, it's time to build your actual quiz!

We recommend the tool [Interact](#) to build your quiz. You can also use Google Forms if you're looking for a free option. [Helpful video here!](#)

- ☐ Make sure your quiz tool is hooked up to your email provider so you can collect email addresses

- ☐ With your quiz created, it's time to follow Blueprint #4 (Email Series) and create email sequences that have helpful emails around your 3 outcomes, along with pitches to your offering at the end!

Yes, you'll will create multiple email sequences and the specific outcome at the end of your quiz will ask for an email address to further help with the problem you identified with the quiz

Continued on the next page!

Marketing Checklist: Quiz Blueprint



☐ With the quiz and email sequences created, it's time to add the quiz to a page on your website. Simply embed the quiz on one page that you can easily link to and offer the quiz.

☐ We also recommend adding multiple calls to action for your quiz (link in main navigation, button on your homepage* with compelling content, callouts in your articles that are applicable)

HOT TIP: You can also make your homepage based solely around your quiz if you want maximum conversions

☐ Don't forget to promote your quiz but also sit back and watch it work its magic!

Marketing Checklist: Partnership Blueprint



- ☐ **Find your partner! Research fellow business owners who have a similar audience to your ideal audience**

You're looking for someone who probably has a slightly bigger audience than you but not so much larger that they won't see the value in partnering with you. Ps. You might already be friends with this person!

- ☐ **If you're NOT already connected with this person, follow them on social media and sign up for their email updates.**

Commit to spending a month interacting with their content, understanding their business, and maybe replying to a few email newsletters. The idea is to create a genuine connection and show them that you don't just want something from them right out of the gate.

- ☐ **Decide what kind of partnership you want to pitch them. Is it a joint workshop? A giveaway? A content series?**
- ☐ **Think about the value proposition that you're going to offer this partner.**

What do they get out of the deal? You get access to their (larger) audience so they have the leverage. What can you do to make their business better? Will you offer to create the content for your joint webinar so all they have to do is send the invitation to their audience? Or will you write up the terms for the giveaway and create the content so all they have to do is post? Really put yourself in their shoes and think about what would be a no-brainer for them.

- ☐ **Write your email pitch with your value proposition and send it off.**
- ☐ **If you don't hear back in a week, send a polite, non-pushy follow-up.**
 - ☐ **If your partner says NO, that's cool. Repeat the previous steps until someone says yes.**
 - ☐ **If your partner says YES, now the fun begins.**
- ☐ **Be sure to communicate clearly and frequently with your partner and make sure you both have agreed ahead of time what each of your roles will be**
- ☐ **The ideal partnership is one in which you're both able to grow your audiences through this joint venture. See if you can include an email signup component to collect emails from both your audiences and then you both will share the lists.**

Just make sure that the subscribers who sign up have some way of knowing they're opting in to content from both of you.

Marketing Checklist: Group Challenge Blueprint



- ☐ **Brainstorm Group Challenge ideas. Think about what activity or experience your ideal customer would want to have.**

For example, if your brand is around motivation, is it a challenge to change a bad habit? That will appeal to people who want motivation. If your brand is around art, is it a challenge to create art every day? That will appeal to people interested in creativity.

- ☐ **Create a compelling landing page on your site that explains your group challenge**
- ☐ **Determine a hashtag people can use when they want to share their experience during the challenge on Twitter, IG, etc**
- ☐ **Have an email opt-in with copy that talks about reminders, updates, and challenge-taker only content**
- ☐ **Create an email sequence that has consistent updates (probably weekly) reminding people of the challenge and offering up challenge prompts**

Think about what tips or inspiration can you offer to keep people engaged.

- ☐ **Remind people to use the hashtag on social media when sharing their challenge updates**

- ☐ **Ask people to email you with any wins, lessons learned, etc (keep these for sharing later on and think about highlighting those people to attract new people to your challenge!)**

- ☐ **Build a content calendar for yourself and for the challenge participants to easily follow**

We recommend being ahead of your challenge content creation (if applicable)

- ☐ **If you're selling an offering during (or after) the challenge, get your sales pitch emails ready to send ahead of time**

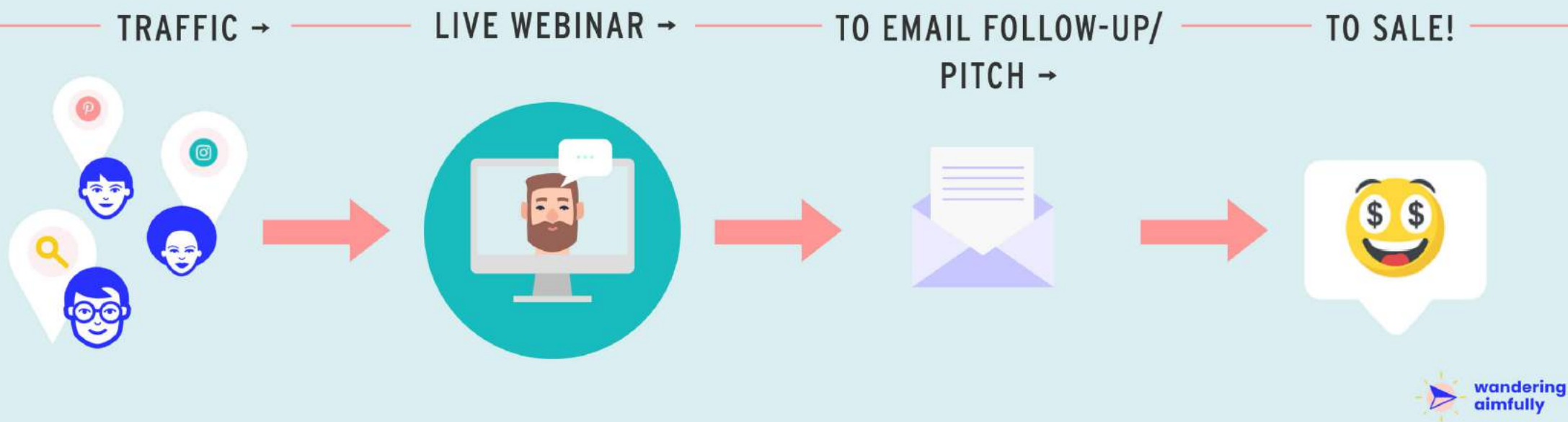
- ☐ **Make sure to keep up with your own efforts during the challenge, promoting it, sharing your experience (or creating your content), and encouraging challenge participants**

Leading by example is KEY with a group challenge

- ☐ **Don't forget to share your group challenge signup page throughout the challenge so people can join at any time**

If your challenge is very time specific, change your email opt-in to focus on signing up for upcoming challenges

Marketing Checklist: Live Workshop/Webinar Blueprint



Before you start the technical aspect of this blueprint, you first need a great workshop to teach! Here's how we recommend you create that:

- ☐ Open a Google Doc (or your writing app of choice) and brain dump a bulleted list of problems you can solve around your offering for your ideal customer
- ☐ Take each bullet point and write as much content as you need to explain that bullet point
- ☐ Look for opportunities where you can share your own unique processes or systems that you've learned/created over the years
- ☐ Add stories throughout your writing to help the customer put themselves in the shoes of someone else who has been where they want to go (your own story is a great one to share!)
- ☐ Open up your presentation app of choice (Keynote, PowerPoint, Google Slides, etc)
- ☐ Your first list of bullet points you wrote become your main slides throughout your presentation

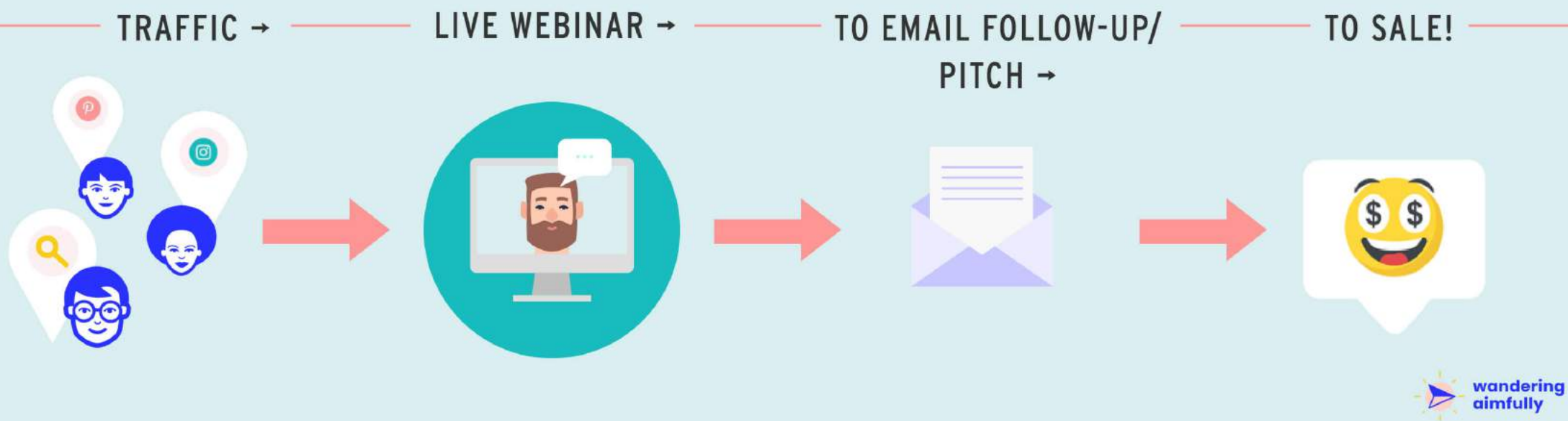
- ☐ The supporting text you wrote about each bullet should be added to slides in condensed format (think numbered or bulleted lists)
- ☐ Use slide builds to bring in information one point at a time as you go through your content (don't have a slide with lots of text show up all at once, it's overwhelming)

We believe a great workshop presentation follows this formula:

- ☐ Introduce the problem you're going to solve (think about getting the viewer to nod their head and say "YES!" to fixing this problem)
- ☐ Introduce yourself and your experience (this should be quick, most folks will already know who you are)
- ☐ Go through the teaching portion of your workshop, being sure to break up long chunks of dense content with questions to the audience and/or visual breaks (GIFs are great for this!)
- ☐ Once you finish the teaching portion, share that you have a product/service (offering) that can help speed up the process

Continued on
the next page!

Marketing Checklist: Live Workshop/Webinar Blueprint



(Workshop formula continued)

- ☐ Go into your sales pitch for your offering
 - ☐ If you want to have workshop-only bonuses, have slides for those
 - ☐ If you have customer testimonials/case studies, have slides for those
 - ☐ Don't be afraid to share "what's in the box" with visuals to show people what they will be getting
 - ☐ Remember to focus your sales slides on the outcomes (problems you are solving) and not just the benefits of your product
 - ☐ Finish up with Q&A and a reminder to purchase
 - ☐ PRO-TIP: If you want to collect short testimonials about the workshop itself, ask people to write 2-3 sentences and send them to you right after the workshop (use these in future workshop registration pitches)

- ☐ Once your presentation is complete, it's time to create your registration page for your workshop

Recommendation #1: We use [Crowdcast.io](https://crowdcast.io) for all our live workshops. They give you a simple registration page with built-in email reminders and social sharing about your workshop!

Recommendation #2: Our friends own [WebinarNinja.com](https://webinarninja.com) and if you want a lot more features, this would be a great option for your workshops. It may be good to graduate to WebinarNinja after getting some simple workshops under your belt.

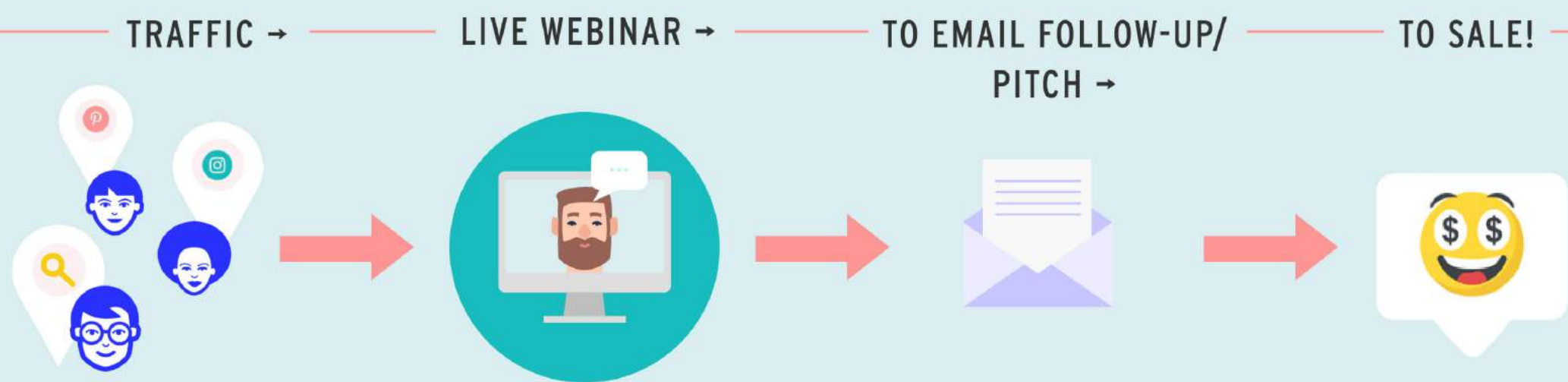
- ☐ Share your registration page for your workshop multiple times. We recommend at least a schedule that looks like this:
- ☐ At least 1 email two weeks out, 1 email 1 week out, and 1 email the day before (or morning of)
- ☐ Use social media to send reminders to signup as well

Assume a 20-30% show up rate (Ex: 100 people register, typically only 20-30 will show up live)

Remember that it may feel like you're sharing your workshop registration page a ton but the reality is most people will only hear about it once, maybe twice!

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the next page!

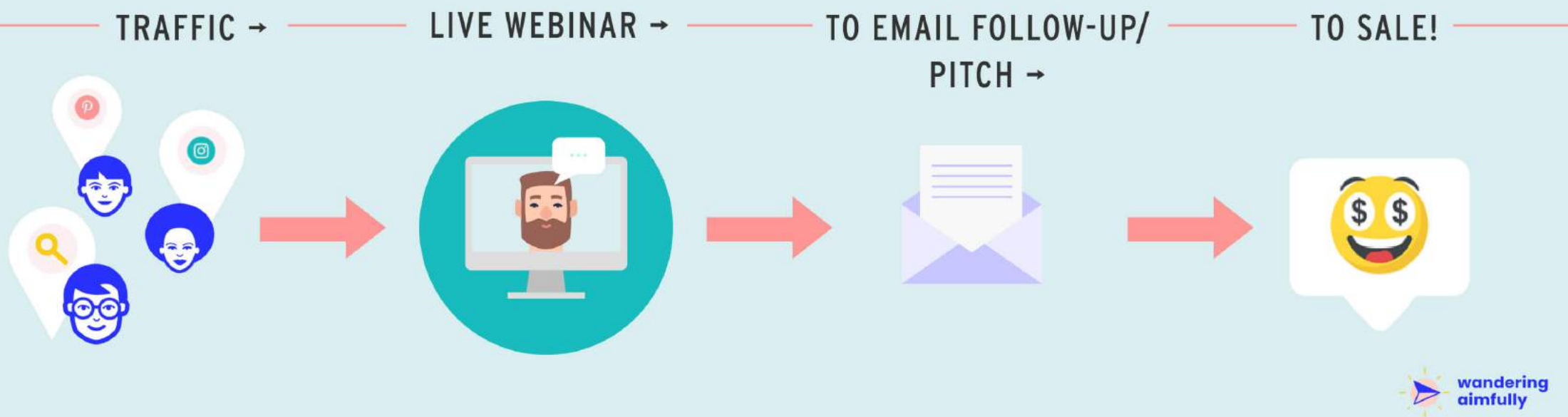
Marketing Checklist: Live Workshop/Webinar Blueprint



- ☐ Before your workshop, write a post-workshop sales email sequence. You can borrow the setup tips for this from Blueprint #2 (“Email Course”)
- ☐ Email #1 (day after): Remind them of the problem your workshop is solving and share your own struggle to figure out the problem (add a soft pitch to buy your offering)
 - ☐ Include the recorded workshop link prominently in this email
 - ☐ Ex Subject line: *“Watch the replay and don’t make the mistake I did”*
- ☐ Email #2: (2 days after): Share a couple of ways they can overcome their fears about what they’re trying to accomplish (add another soft pitch to buy)
 - ☐ This is a great email to include case studies from people you’ve helped
 - ☐ Ex Subject line: *“I helped [Name of person] completely turn things around”*
- ☐ Email #3: (4 days after): Include some sort of checklist, actionable guide, or process that your customer can learn from that’s inside your offering (this email is more dedicated to selling)
 - ☐ If you’re using a countdown timer for any bonus offerings or a discount code, this is a good time to wind that down and remind them of that schedule
 - ☐ Ex Subject line: *“Steal my XYZ process doc and <insert outcome>”*
- ☐ Email #4: (5 days after): This is your final sales pitch and you want to hit home a couple of things:
 - ☐ The outcomes/benefits your offering will bring your customer (how will they feel? How will their life be changed?)
 - ☐ The features of your offering (how many video lessons? How many worksheets? Direct access to you or a community? What are the tangible things they get?)
 - ☐ Reminder about case studies of folks you’ve helped
 - ☐ Callout to the end of the discount or the closing of the doors to get your product
 - ☐ Ex Subject line: *“The doors are closing OR The discount code is expiring in X hours”*
- ☐ Email #5: (10 days after): This is your bridge email from the sales sequence to adding these subscribers to your main email list

Continued on
the next page!

Marketing Checklist: Live Workshop/Webinar Blueprint



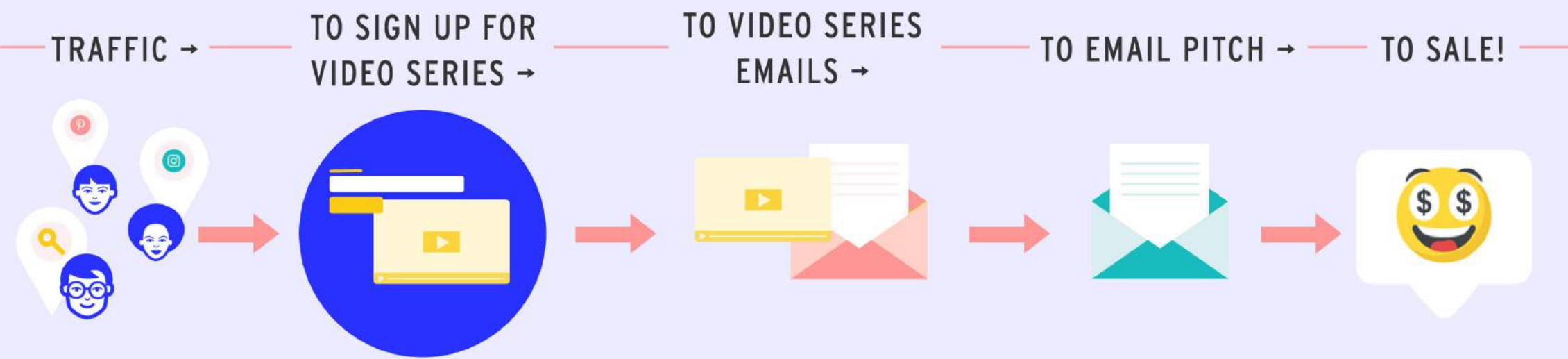
Email #5 Continued:

- ☐ Be honest and direct that will be adding them to your email list moving forward and what awesome stuff they can expect from you
 - ☐ Let them know they can unsubscribe at any time but, “if you got value from the workshop, I think you’ll enjoy my emails and hope you’ll give them a shot.”
 - ☐ Make sure to do a test workshop ahead of your actual workshop to test your camera, microphone, and screen-sharing settings (and get familiar with the workshop app you’re using) *See Fancy box for gear recommendations
 - ☐ PRO-TIP: Print out your presentation slides and review them a few times before going live, this helps you know your slides and what to expect as you teach
 - ☐ Go live with your workshop, rock it out, be confident in your live sales pitch!
 - ☐ Once the workshop is over, download the attendee email list (CSV file) and add it to your email provider and your email sales sequence you already wrote
- ☐ If you do any tagging with your email list, this is a great time to do that and make sure you tag which workshop these people attended so you can track the efficacy of this marketing tactic

Oh, you fancy! 🎀

- ☐ For video, we recommend a simple [Logitech HD web cam](#).
- ☐ For audio, we recommend a simple [RODE Smartlav lavalier microphone](#).

Marketing Checklist: Video Series Blueprint



- ☐ This blueprint will be extremely similar to blueprint #4 (“Email Course”) with the added feature of including video links in the email “course” sequence
- ☐ Write down the topic of each of your videos. As far as creating helpful videos go, try to focus on conveying ONE helpful point or solving ONE problem with each video.
- ☐ Write a script for yourself and think about making your videos just as long as it takes to illustrate a point, but no longer (3-5 minutes is a good timeframe)

Tip: These videos should not be too long and should quickly give the viewer a win and some sort of tactic/strategy/process they can use after watching

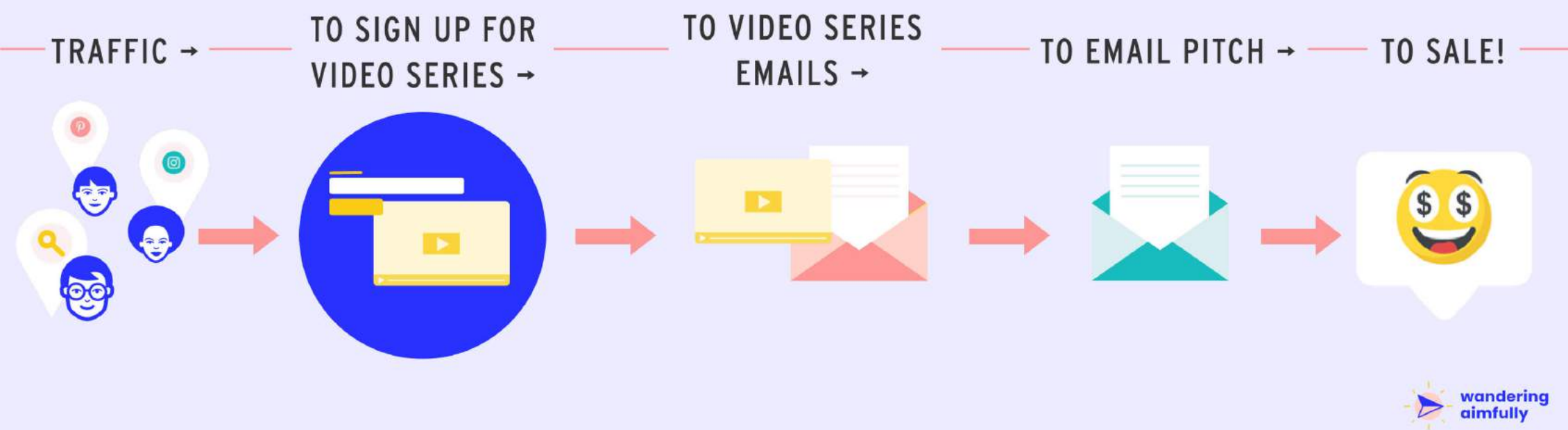
- ☐ Optional: If you don’t feel confident being on camera, you don’t have to be! Create slides in Keynote, PowerPoint, Slides, etc for each of your videos in your series
- ☐ Record audio talking over your slides and export that recording as a movie file (this is your video!)
- ☐ Determine your gear setup. If you are going to be on camera, there are 3 important technical aspects to consider with video:

- ☐ Picture Quality: Most phones are good enough these days to record good video, but you can also use a simple web cam ([Logitech recommendation here](#))
- ☐ Lighting: Bad lighting will immediately ruin a video. Try to orient yourself to have natural light in front of you as you record. If you can’t use natural light, some [affordable table lights \(only \\$20!\)](#) go a long way.
- ☐ Audio: Nearly as important as the video and lighting, good audio can really elevate a video. We highly recommend using a lavalier microphone and this [RODE Smartlav](#) is one we use all the time.

- ☐ Now record your videos! If you are going to be on camera, there are 2 tips we recommend to feeling confident in what you say while you record:
 - ☐ Practice, Practice, Practice: You may want to practice recording 1 video 10 times. Whatever it takes for you to know the information in and out.
 - ☐ Pretend you are talking to a friend. Don’t think about recording a video for a stranger, pretend you’re explaining a topic to a close friend.

Continued on
the next page!

Marketing Checklist: Video Series Blueprint



- ☐ **Edit your videos. When it comes to editing videos, err on the side of simplicity!**

iMovie is a great option to use to edit videos quickly.

- ☐ **Use presentation slides as overlay images to break up parts of the video when you take a pause or just to visually add interest to longer talking points**
 - ☐ **Export your slides as PNGs or JPGs**
 - ☐ **Almost any simple video editing software will allow you to overlay images on your video**

For example: When we write video scripts we tend to write them in bullet format and between each bullet we use an overlay image on screen to cover up any awkward pause or break we needed to take on screen

- ☐ **Also use presentation slides to create visual sales pitches for the end of each of your videos in the video series**
- ☐ **Once your videos are recorded and edited, it's time to upload them somewhere to be hosted:**
 - ☐ **YouTube (best free option):** If you're trying to stay low-budget, use YouTube and set the videos to unlisted. If you can't use unlisted, then make them public and create a Playlist on your channel. (Just do your best to send a viewer to your email list from the video.)

- ☐ **Vimeo (good paid option):** You can create private videos on a paid Vimeo plan and the Vimeo player is great.

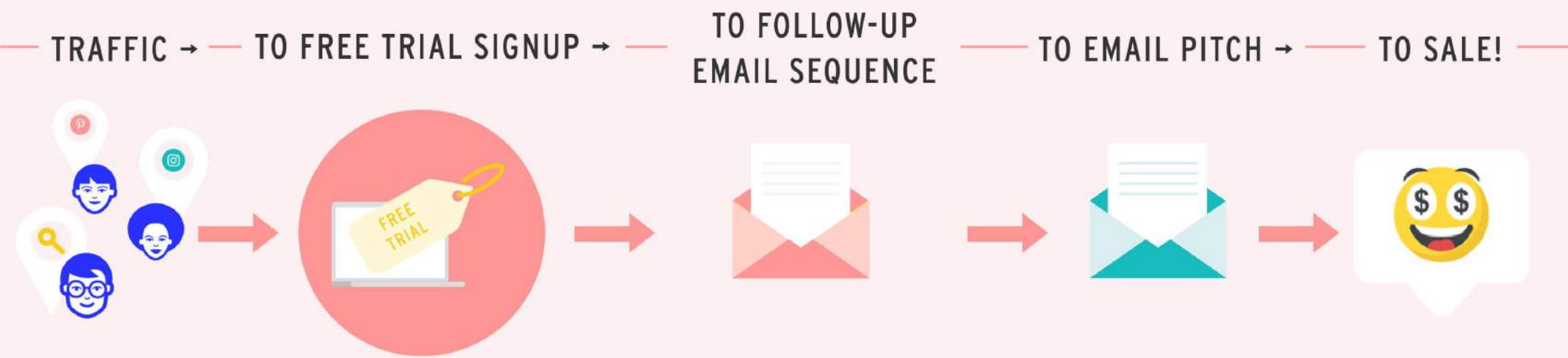
- ☐ **Wistia (higher end):** Not only does Wistia give you advanced video analytics and a video player you can customize, but they also have built-in calls to action with buttons at the end of videos

- ☐ **IMPORTANT:** No matter which video provider you choose, we highly recommend creating pages on your website for each video in your series and embedding the videos there. This way you can add supporting text, any downloadable helpful goodies that go along with the video, AND you can have buy buttons for your offering under the videos.

- ☐ **When your videos are done, the pages on your website have your videos embedded in them, and you've tested all the videos, links, and buy buttons, it's time to create the email sequence in your email provider that drips out the video series!**

- ☐ **Follow the instructions for this from blueprint #4 ("Email Course")**

Marketing Checklist: Free Trial Blueprint



There's a lot of variation when it comes to setting up a free trial but we'll walk you through the steps we took for our 7-day free trial of our previous membership offering

- ☐ Start with the tool you use to manage your customers and create a membership level that has a 7-day trial period before charging the customer, but still gives them access to your offering

For us, we use Restrict Content Pro and they make it really easy to setup free trial period membership levels

- ☐ Make sure your membership level with the trial allows access to whatever content or areas on your website it should
- ☐ Create a landing page on your website dedicated to the 7-day free trial offer
- ☐ Make sure to think of this page like a normal sales page and explain the problem your product solves
 - ☐ Have a clear button for the 7-day trial signup AND make sure your potential customer knows they will be charged after the trial period ends

TIP: We DO recommend taking payment information for most free trials as it helps get a more qualified potential customer in your trial

- ☐ Use what you learned in Blueprint #4 ("Email Course") to create a 7-day email sequence that starts as soon as someone signs up for the trial

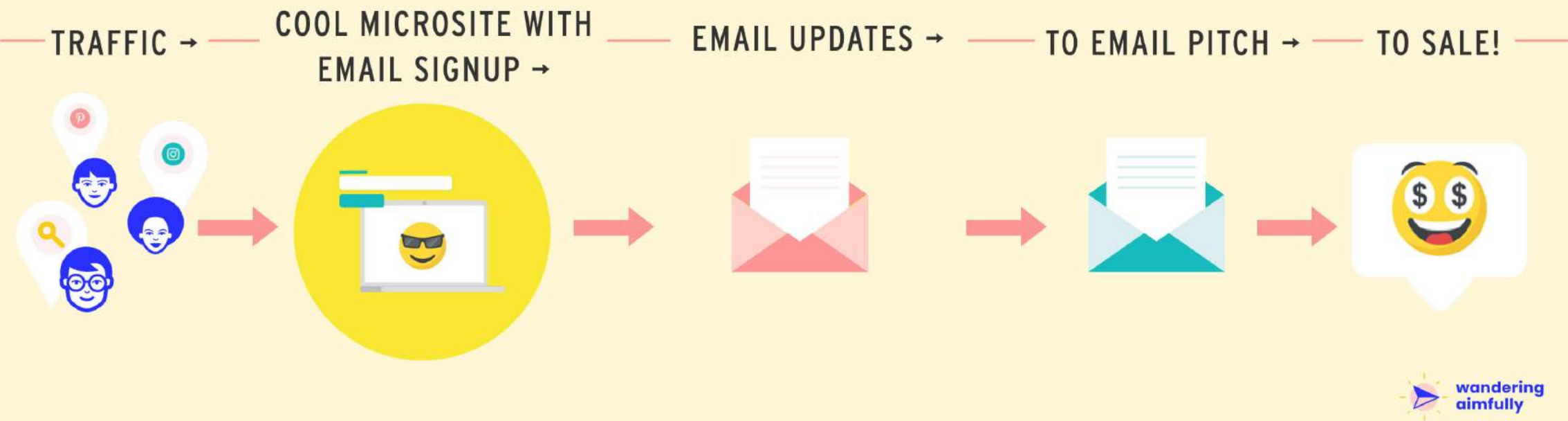
- ☐ You should send an email each day of the free trial that does 2 things:

- ☐ #1: Points out ONE important feature of your offering they should take advantage of
- ☐ #2: Tells them how much time is left in the free trial (you can simply add the number of days manually based on the email)

In the email sequence think about the wins you can get for the customer to help them see the ongoing value of your offering once they start paying

- ☐ TIP #1: Do not make it difficult to cancel the free trial. Treat your potential customers like you'd want to be treated if YOU signed up for a free trial.
- ☐ TIP #2: If someone cancels their trial make sure you have a mechanism in place or a reminder for yourself on how to remove their access to your offering (a product like Restrict Content Pro does this for you, but you may need to update your email provider)

Marketing Checklist: Cool Microsite Blueprint



There's a TON of variation to creating a Cool Microsite, but we'll share the important parts you don't want to forget about

- ☐ No matter what you do for your Cool Microsite, make sure you have some form of email capture on it (this could be a "Lead Magnet" or simply an email opt-in form to get more content like the microsite)
- ☐ If you're feeling frisky you could make an Email Course related to the Microsite and have that be the opt-in!

3 things to focus on when making a Cool Microsite:

- ☐ **WOW Factor:** What part of the site makes someone says "WOW" when they view it? What can you do that's unique or interesting?
- ☐ **User Experience:** All the cool in the world doesn't matter if the microsite itself isn't easy to navigate and enjoy
- ☐ **One Big Takeaway:** What's the big takeaway a visitor of the Microsite can walk away with. If this isn't readily apparent, make it apparent!
- ☐ Don't forget to make it easy for a viewer of the Cool Microsite to share the site!



Marketing Calendar



Month:

Notes:

Marketing tactic to try:

Month:

Notes:

Marketing tactic to try:

Month:

Notes:

Marketing tactic to try:

Month:

Notes:

Marketing tactic to try:

Month:

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Marketing tactic to try:

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Marketing tactic to try:

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Marketing tactic to try:

Month:

Notes:

Marketing tactic to try:

Month:

Notes:

Marketing tactic to try:

⚡ Two-week Action Plan ⚡

WEEK ONE:

Task	Date I Will Complete This	Complete?
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

WEEK TWO:

Task	Date I Will Complete This	Complete?
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>



Experiment Sheet



THE EXPERIMENT

Today's date:

Experiment purpose:

The tactic I'll be testing:

THE RESULTS

Today's date:

Conclusions:

Observations:

THE IMPLEMENTATION INTENTION

I will start on...

I will report back every...

DATA

Date	Current Metric	Goal	Notes	Result



Example!



Experiment Sheet



THE EXPERIMENT

Today's date:

10/1/19

Experiment purpose:

To improve conversions of traffic to our website to newsletter subscribers

The tactic I'll be testing:

Adding a lead magnet to opt-ins across my site

THE RESULTS

Today's date:

11/4/19

Conclusions:

Through a compelling opt-in and incremental improvements to forms, I was able to lift conversions to 1%!

Observations:

It felt good to have a clear action to take each week and a way to see measurable progress!

THE IMPLEMENTATION INTENTION

I will start on...

10/7/19

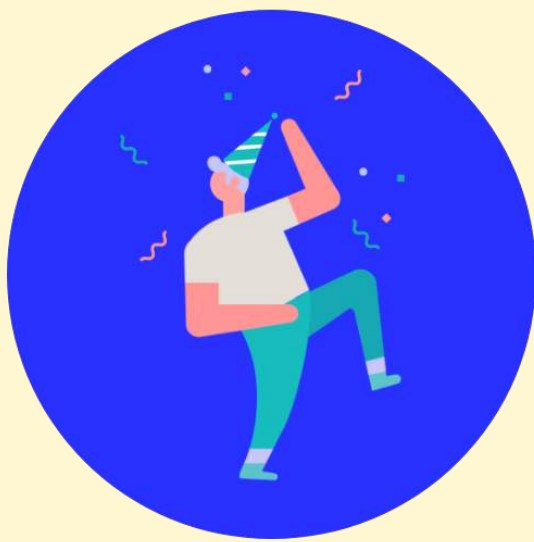
I will report back every...

week

DATA

Date	Current Metric	Goal	Notes	Result
10/7/19	.02% conversion	1% conversion	Added callout to lead magnet	.03% conversion
10/14/19	.03% conversion	1% conversion	Added image of PDF to form	.05% conversion
10/21/19	.05% conversion	1% conversion	Created landing page for lead magnet & promoted on Pinterest	.07% conversion
10/28/19	.07% conversion	1% conversion	Added link in navigation to lead magnet page	.09% conversion
11/4/19	.09% conversion	1% conversion	Moved opt-in forms on blog to top of page	1% conversion 🎉





You did it!

You made it all the way through the workbook! Did you take action and fill out each page? We hope so. Share a few screenshots of your favorite pages and tag us @wanderingaimfully over on Instagram. No need to keep Unboring Group Coaching all to yourself! 😊