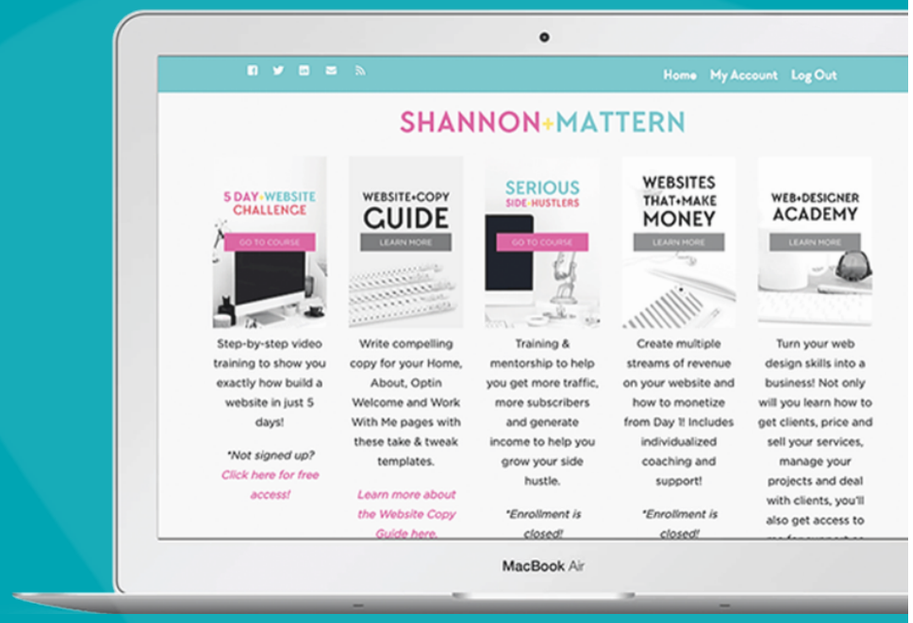
accessally™

MEMBERSHIP SITES THAT SELL THEMSELVES

The step by step guide for planning, creating, and launching your course website.



Written by the AccessAlly Team

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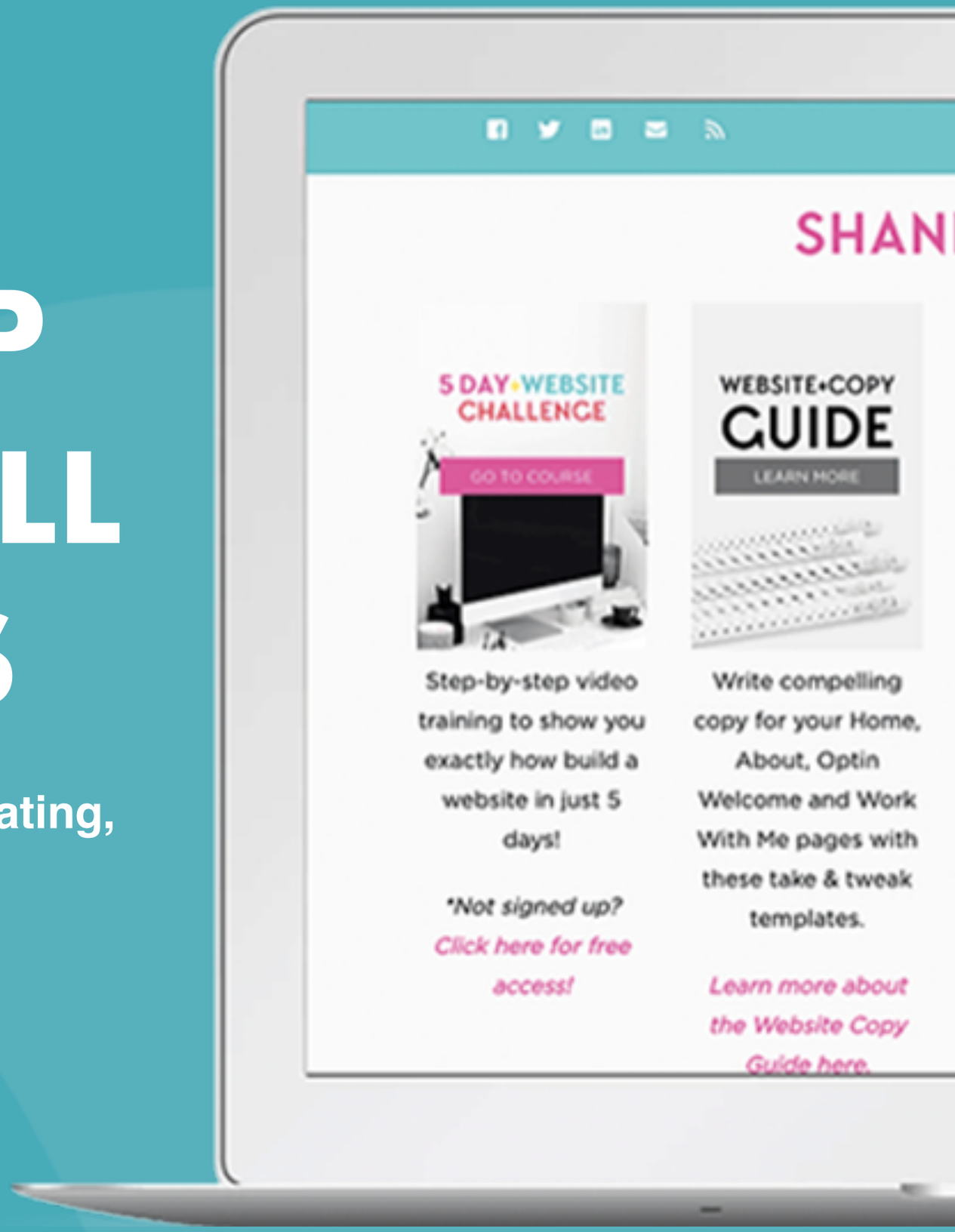

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About AccessAlly

We're an eclectic team of digital marketers with software engineering and computer science training, with our eye on one thing: delivering membership solutions that focus on amazing customer experiences.

But in reality, we're here for a much bigger mission.

We want to help business owners make their ideas a reality, so they can build a sustainable business that provides for their family.

How do we accomplish that?

- We do fewer things, better.
- We raise the bar: iterate, learn, and improve.
- We empathize with the human being in every interaction.

We're also the creators of the AccessAlly membership solution for WordPress, which we'll talk more about once we discuss the technical side of building membership sites.

I'm Nathalie Lussier, the founder and author of this guide, and I can't wait to share what I've learned in my 10+ years in this digital space we call home.



I'm an award-winning entrepreneur, international keynote speaker, and author who has been making websites since I was 12 years old. I graduated with a degree in Software Engineering and a job offer from Wall Street, but I turned down this job to start my own business right out of college.

My company and I have been featured in Forbes, Inc., Fast Company, Success Magazine, Entrepreneur, Venture Beat, and Mashable.

Our own membership site welcomes over 57,000 members on a regular basis for both paid and free courses, and I'm excited to share the keys to our membership site success.

Let's go!

"

The best time to plant a tree was 20 years ago. The second best time is now.

Chinese Proverb

Your Membership Site and Customers Will Thank You For Taking The Time To Read This Guide

Congrats on picking up this step-by-step guide!

You may have heard that membership sites are the key to scaling your business, earning passive income while you sleep, and getting out of the 1-on-1 service business rat race...

All of that may be true, but the reality for most membership site owners and online course creators tends to be quite different.

Instead of being a "hands off" source of income, setting up a membership site can take up 80% of your time… but only bring in 20% of your income, if you don't plan properly.

A membership site done the wrong way can turn into a:

- Hamster wheel of content creation (also known as feeding the beast you've just created, chomp, chomp!)
- Technical set-up nightmare that takes twice as long and costs twice as much as you budgeted
- Constant source of stress and worry: from how to get new members, and keep existing ones from cancelling…

That's where this guide comes into play.

It will give you the resources you need to come up with a plan to earn 80% of your revenue while spending only 20% of your time creating content and minding your membership site.

With a membership site that's designed with your goals in mind, you'll be:

- Waking up to new sales each morning (ka-ching!) or doing one or two promotions per year to fill your membership
- Seeing members support each other and even invite their friends
- Receiving happy letters from your students about the results they're getting
- Feeling proud of your membership and course offerings because they're a profitable part of your business

Excited? Great! Let's get to the good stuff.

6 Types of Memberships and Recurring Revenue Models



6 Types of Memberships and Recurring Revenue Models

One of the key things to decide is what type of membership site you plan to create.

This decision alone can make or break your offer. It will affect conversions and the long term sustainability of your site.

It's also the starting point for designing a membership site that sells itself.

There are different types of online course sites and experiences you can create based on your strengths as a teacher, leader, and business owner... and what your ideal customers are willing to invest in.

What Are Membership Sites?

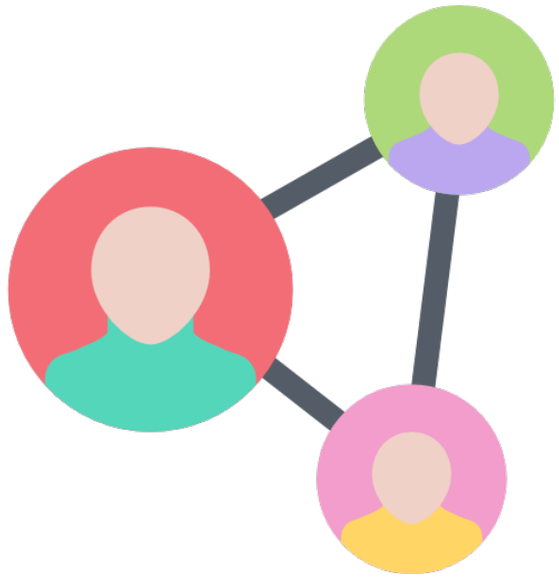
Before we get too far, let's get on the same page about our definition of a membership or course website:

A membership site is a place where free or paying members can login to access their content, courses, and community.

You can charge a one-time fee for access or build in a recurring revenue stream with monthly or yearly payments.

Membership Type # 1

Community Focused Memberships

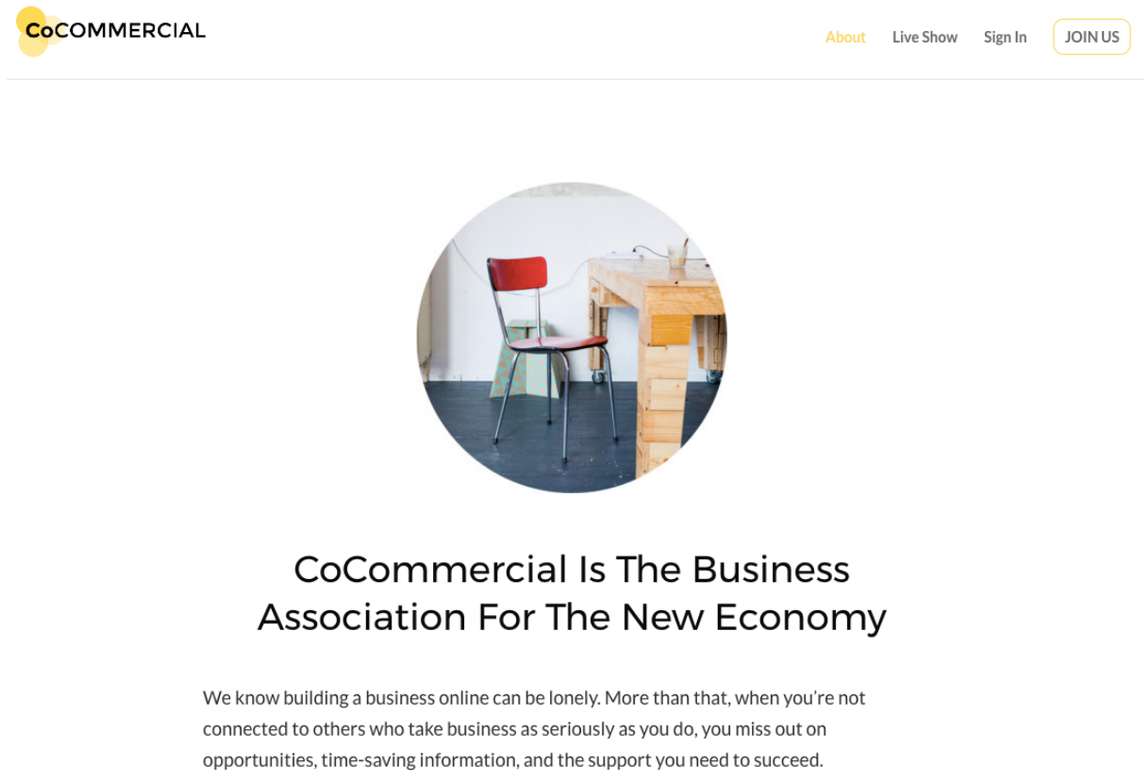


What Is It?

The community focused membership site is all about connection.

It's about facilitating strong relationship building among the members. Because of this, it might have a heavy focus on a member directory, a forum, masterminds, accountability, or other "people-driven" benefits.

An example of a community focused membership offering is Tara Gentile's Co-Commercial's global network of business owners.



Which clients it attracts:

This is an especially powerful type of membership site for clients who need help meeting their peers and getting the support they need at in-person events. It may also complement an in-person organization.

This type of membership can be very high-end for clientele such as business executives, or it can have more of a mass appeal, like mothers of twins who want to support each other with tips and advice.

How to create it:

There are a number of things to think about when creating a community focused membership site. You'll want to think about the goals for the members and how they can best connect, whether that's allowing them to search and find each other, or hosting a forum where they can freely communicate.

Then, you'll want to decide if you want to host some of the forum capabilities on existing platforms (like Facebook groups or MightyBell) or if you'd prefer to house everything inside your own membership site.

Map out the interactions you'd like to offer before considering the tools you want to use. Also, think about your community management approach: the more active, engaging, and supportive you are as the organizer, the better experience your members will have.

Good experiences always lead to your current members bringing new friends with them.

Why you might consider it:

The best part about this type of membership is that people are more likely to stay with you as active paying members once they've made great connections in your community.

Yes, it's still possible that people might sign up, join the community, then cancel. But it's more likely that a solid structure and positive environment will keep people coming back for more.

UP NEXT:
The All You Can Eat Education Buffet

Membership Type # 2

All You Can Eat Education Buffet



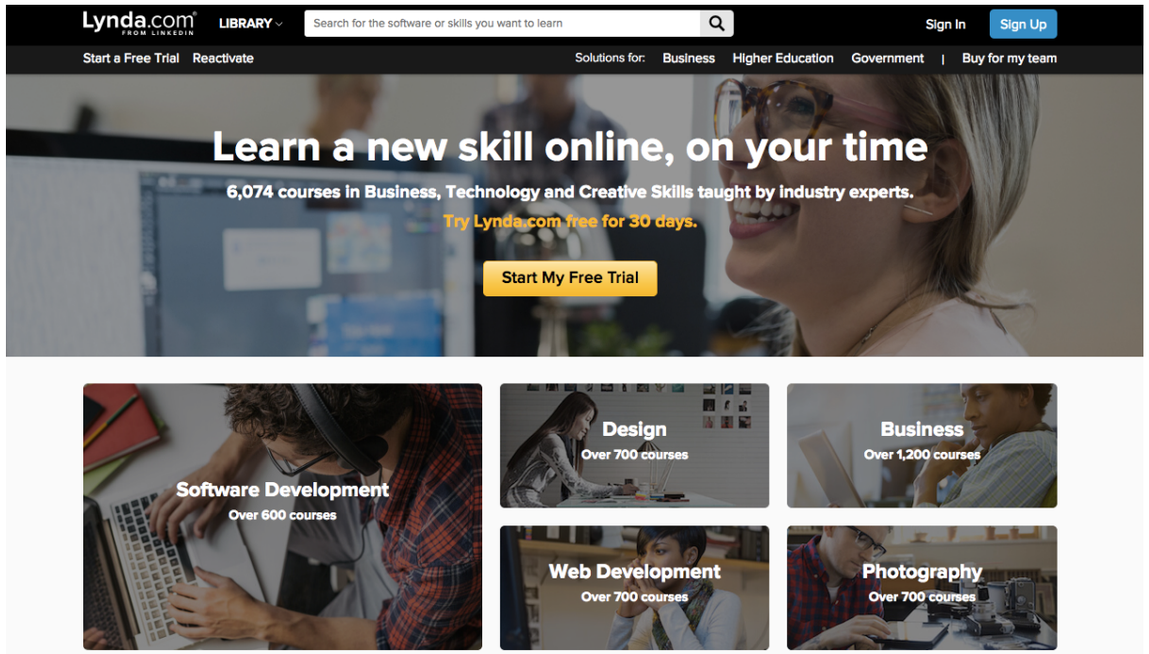
2 All You Can Eat Education Buffet

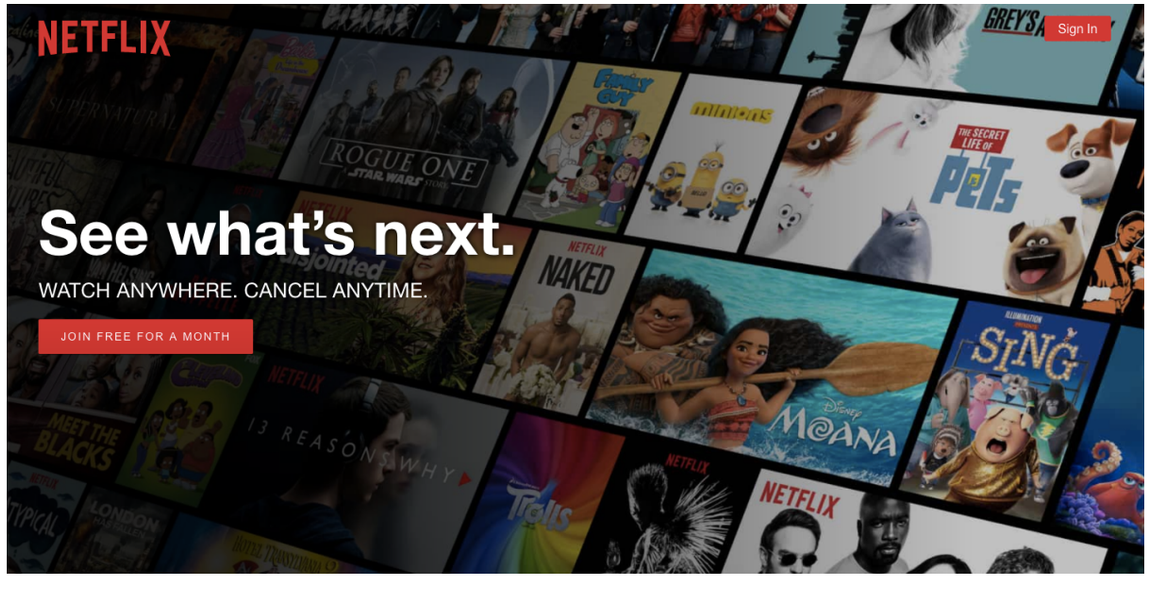
What Is It?

Think of this style of membership as the Netflix of online learning: a member joins and has access to a bunch of content from day one.

A great example of this type of site is Lynda, where you can learn about a ton of different skills in business, technology, and more.

It's a library of courses that continues to grow over time.





Which clients it attracts:

This buffet-style membership site attracts people who want to improve themselves and their skills.

They may come on board to achieve a specific goal and leave when they've gotten what they needed. However, if you plan out an educational roadmap, then people will know where to go next inside the site after they complete their initial goal.

How to create it:

It helps to have a focused outcome in mind when choosing your membership focus, instead of starting out broadly like Lynda.

(Keep in mind, too, that sites with a wide range of topics have many content creators and teachers to handle the breadth and scope of the courses.)

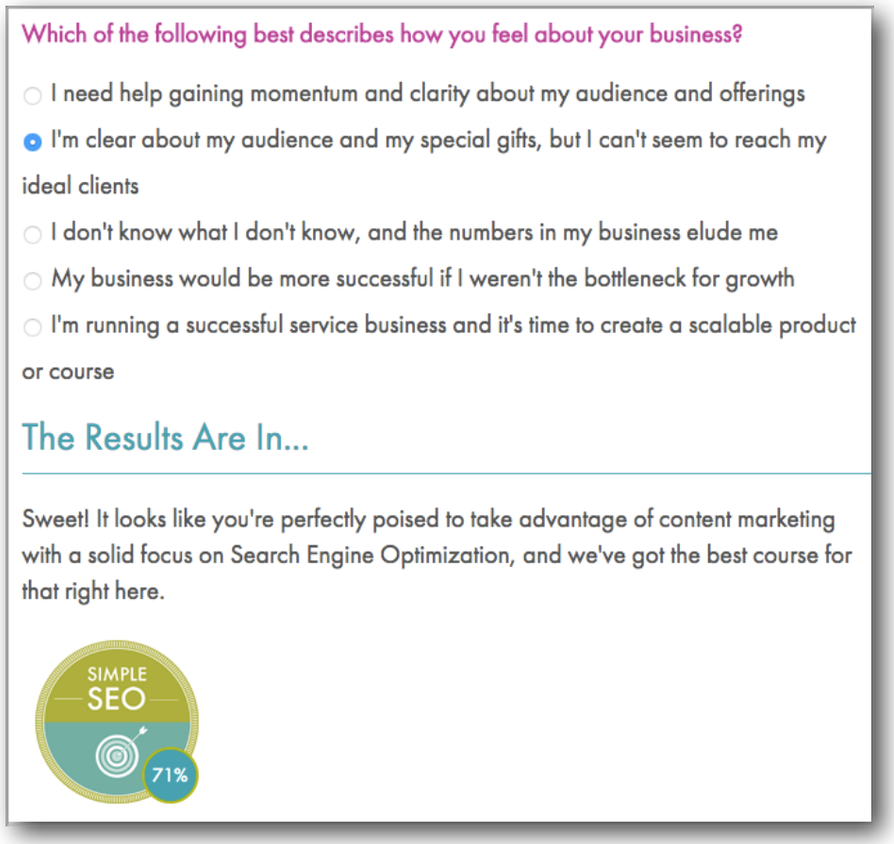
When designing your "all you can eat" membership, map out the first few modules or courses you plan to offer.

You don't need to have all of the content done when you launch, but even a list of upcoming courses can be enough to keep people engaged and ready for the next step.

You can decide if you want to give instant access to all of your course materials, or if you'd rather allow people to access a set number of courses per month or quarter.

The most important thing you can do in designing your education buffet membership is to make it easy for people to find the right course for them.

You can do that using quizzes that guide people to the right next step. Or, you can connect them with the appropriate material by offering sophisticated search functionality, or even by giv-



ing recommendations based on previous courses they've enjoyed.

Why you might consider it:

This makes a great type of membership if your teaching material does not become outdated.

If you teach anything technology related, you'll need to invest additional resources to keep your material accurate and up-to-date.

If your teaching topics are evergreen, though, this type of membership will continue to increase in value over time, attracting more members along the way.

UP NEXT:
The Coaching and Accountability Membership

> *"Learning never exhausts the mind.*
>
> *-Leonardo da Vinci*

Membership Type # 3

The Coaching and Accountability Membership



What Is It?

This type of membership is often called group coaching, and it packs a lot of value for the participants. There are different ways to offer coaching and accountability with this model.

Generally, you'd offer live office hours or coaching calls where members can show up, ask questions, get support, and accountability. You can also create opportunities for the coach or leader to keep track of participants' progress, encouraging them if they get stuck along the way.

An example of this type of membership site is run by Erika Lyremark. It's a weekly coaching program called Mark'd Mastery.



Weekly Business Whipping

Every Monday … mindset, money & motivation ménage à trois … for an unforgettable experience that will get you more fired up & excited about tackling your week than a 50% off sale at GUCCI.

// We rendezvous at 10:00 am CST for an easy to remember, hard to forget, advanced sales, marketing & mindset training. *There are a total of 52 trainings. One per week.*

// Then I open up the lines for Q & A – and top-notch one-to-one business coaching.

// I'm a genius at quickly creating ***customized*** solutions (no cookie cutters in my brain) and asking ***provocative*** questions that expand your opportunities, give you instant clarity on ***exactly***what to do next, and create strategies to take fun, money-making, big-picture action.

All calls are recorded (to capture our collective genius) and emailed out that day – so if you're unable to attend? *No worries!*

Which clients it attracts:

Ideal clients can range from busy executives and business owners to anyone who has a personal goal to achieve. In any case, the client needs help to make their goals happen (think athletes, students, language learners, etc.).

People prioritize what they care about, and committing to this type of coaching membership helps clients pursue and make their dreams a reality.

How to create it:

Decide the frequency and depth of access you'll be offering as a coach, whether that's a monthly coaching call, weekly office hours, or something else.

You might decide to offer your coaching via forums or written communication, but the most important thing is to decide on your boundaries for when you plan to actively coach versus when you'll be "offline". Sticking to certain pre-scheduled hours of operation or coaching sessions is a powerful way to focus your time and energy where you need it the most.

You can use any number of tools to host your coaching sessions live: Zoom, Instant Teleseminar, Webinar Jam, Crowdcast, Facebook Live, and anything in between.

If you record your sessions, you can also upload your video or audio to a site like Vimeo, then embed the recordings inside your members area for those who missed the live session.

You can also offer private, one-off homework reviews and accountability. This personalized membership offering can be very powerful. You might not be able to work with hundreds of individual clients each month, but you can offer a few spots per month for individual critiques or homework submissions.

By limiting your 1-on-1 availability, you increase the value (and appeal) of your offer without adding a ton of work to your schedule.

Why you might consider it:

In our busy modern world, there aren't a lot of places where you can get individual attention from someone with a lot of expertise... at least, not without breaking the bank. This type of

membership offers you and your clients the best of both worlds. If coaching is something you love and you want to help your clients achieve their goals (without putting a cap on your earning potential), this might be for you!

UP NEXT:
Done For You Resources To Take And Tweak

"What you do today can improve all your tomorrows.
-Ralph Marston

Membership Type # 4

Done for You Resources to Take and Tweak



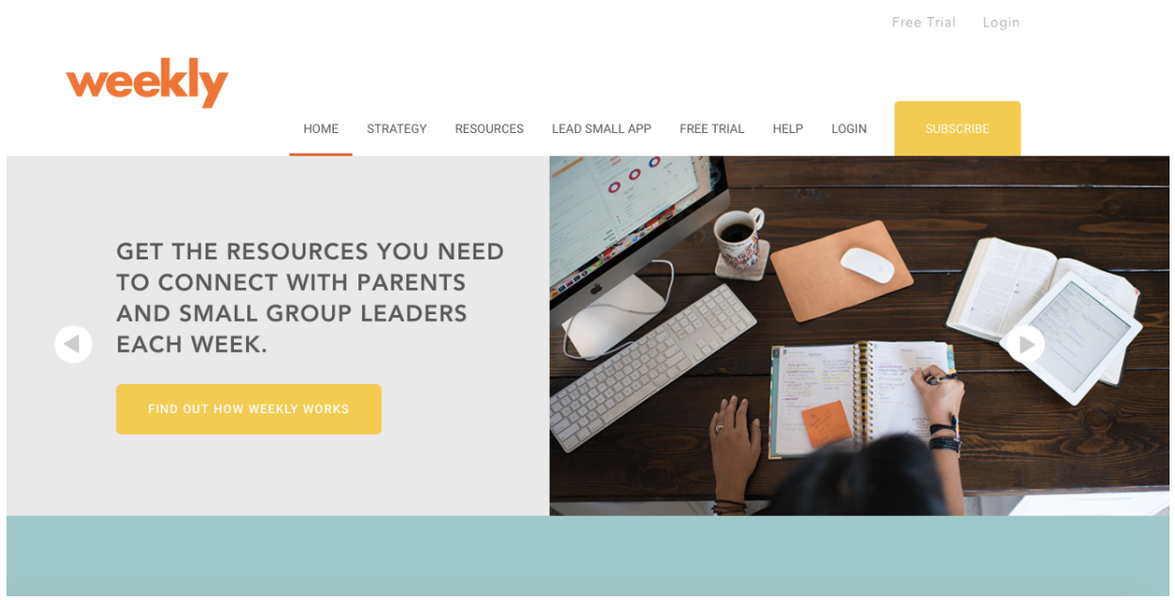
4 Done For You Resources

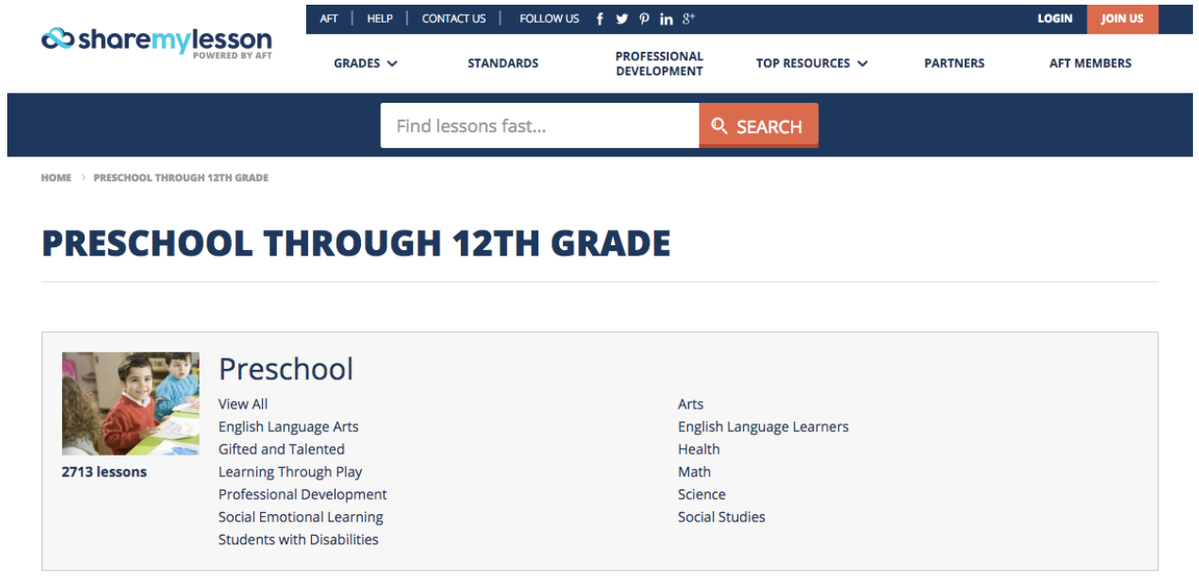
What Is It?

This type of membership offers huge time savings for its members by eliminating time-consuming work and offering a resource that can be used as-is or with minor tweaks. Offering templates, lesson plans, and other "done for you" downloads is a powerful way to scale and provide items of value to members.

Examples of membership like this include Simply Skilled Teaching, Share My Lesson, and Go Weekly for ministries. There are also plenty of examples in the design space like Flat Icon, stock images sites, and Theme Forest.

The benefit of these sites is that members don't need to re-invent the wheel. Instead, they can work with an existing set of content and make it their own.





Which clients it attracts:

This type of membership tends to be extremely stable because of the recurring needs of your clientele.

If a teacher, ministry leader, or blogger needs new content each week and can simply take your material and tweak it... They'll stay on board to save time and keep getting your new materials.

It's a no-brainer for the right clients. If you're drawn to this type of membership it's likely because you've BEEN your ideal client so you're in a place to create the best materials for them.

How to create it:

This type of membership will see you consistently creating a lot of content, so think through the best way to organize it from day one.

You'll want to:

- Decide how content is released over time. You might have people joining your membership site at different points in the year, for example, so decide if you want members to be able to access old content to start from "day one", or if they have to start at your latest release.
- Be able to store the downloads in a secure area, and make sure that the entire model scales... especially as your membership grows and you start having hundreds and thousands of downloads per week or month.
- Think through any of the legal details like how participants can use your creative work. Can they make derivative works, republish, or re-sell them? Will you limit how many people can use some of your pieces? For example, if you offer blog posts or sales copy that people can take and tweak... will you make these available to only a small number of members to keep them unique enough once edited?

Why you might consider it:

If you're already doing the work creating this type of content, and people are asking how you do it or if you ever offer it... then this might be a great type of membership site for you to offer.

4 Done For You Resources

Anything that saves people time is highly valued. If you're already seeing interest, you know that the demand is there.

All that's left is a matter of marketing it properly to get the word out.

UP NEXT:
Retainers and Other Service Memberships

"Ideas have a shelf life, use them before they expire.
-Nathalie Lussier

Membership Type # 5

Retainers and Other Service Memberships

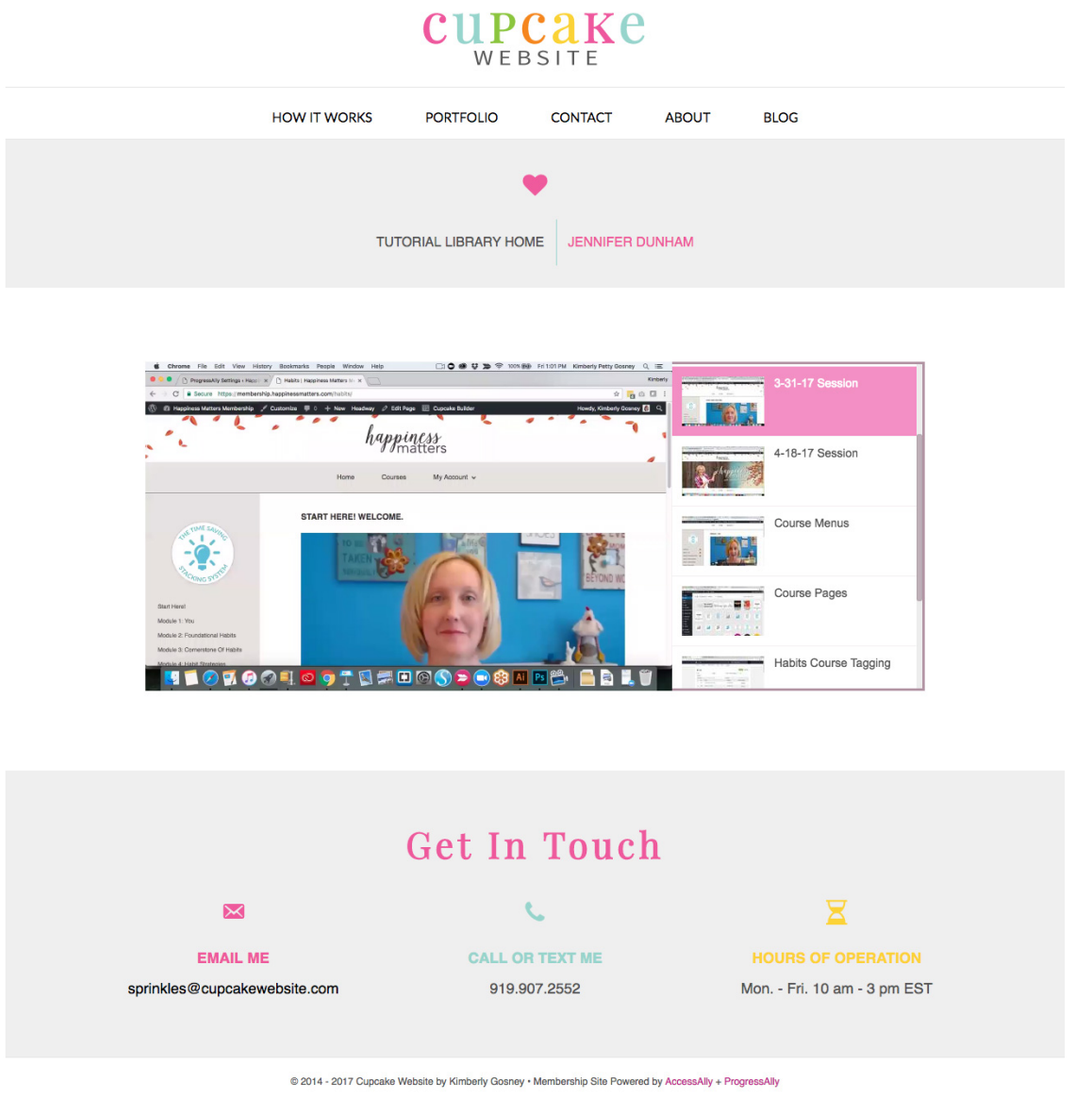


What Is It?

This type of membership is perfect if you work 1-on-1 with clients. It's set up to communicate with your clients, retainer engagements, and other services... so you're freed up to focus on the service itself, whether that's interior design, copywriting, or health coaching.

The best way to describe it is as a client dashboard. It can be used to facilitate the process of onboarding a new client. Or, you might use the membership site after the services have been delivered as a way to stay in touch with a client and offer additional training or resources.

One developer and AccessAlly Certified Partner who uses her site this way is Kimberly Gosney. When someone decides to hire her, they receive an email with info that auto-logs them into her membership site. They're then walked through their project quote, welcome video, and checklist to get the project underway. This allows her to save time and charge well for her services, too.



Which clients it attracts:

If you're offering a premium service of any kind, it tends to attract higher-end clients. These clients prefer to pay someone to work on a project rather than learn how to DIY it themselves.

The downside with this model is that you're limited on the amount of clients you can take within a given timeframe. But with streamlined systems and a membership site to show clients what to expect, you can greatly optimize the process.

How to create it:

First you'll want to create a map of the steps that you generally take. Depending on which step of the client process your membership site will take over, you might map out what happens when signing up a new client, while you're working with them, or after you wrap up an engagement.

Having this written outline will give you a starting point for what to include and how you might be able to convert some of the steps into automated workflows inside your membership area.

Another huge part of this membership model depends on leveraging a Customer Relationship Management (CRM) system.

This lets you keep track of each client's interactions and where they are along the process.

For example, you might have a flow mapped out in your membership site for what happens once a client signs on. Then, with your CRM, you can tag them based on what point they're at in the process (whether they've signed the contract, agreed to your terms, watched the welcome video, booked their first call, or taken any of other steps you generally do manually).

With your CRM, you can flesh out some follow-up campaigns and sequences to check in on a client if you haven't seen them login to the members area to complete a necessary step of the process.

If you're using your membership site for retainer clients, you might track how many hours you've worked, so clients always know what's left. They can even use the site to purchase more time.

Why you might consider it:

This is a no-brainer type of membership for freelancers, agencies, and anyone who works with clients already. It's also a

great way to onboard 1-on-1 coaching clients, and build in a clear process to keep everyone on the same page.

UP NEXT:
Internal Training Turned into a Profit Center

> *All our dreams can come true, if we have the courage to pursue them.*
> *-Walt Disney*

Membership Type # 6

Internal Training Turned Into a Profit Center



6 Internal Training Turned Profit

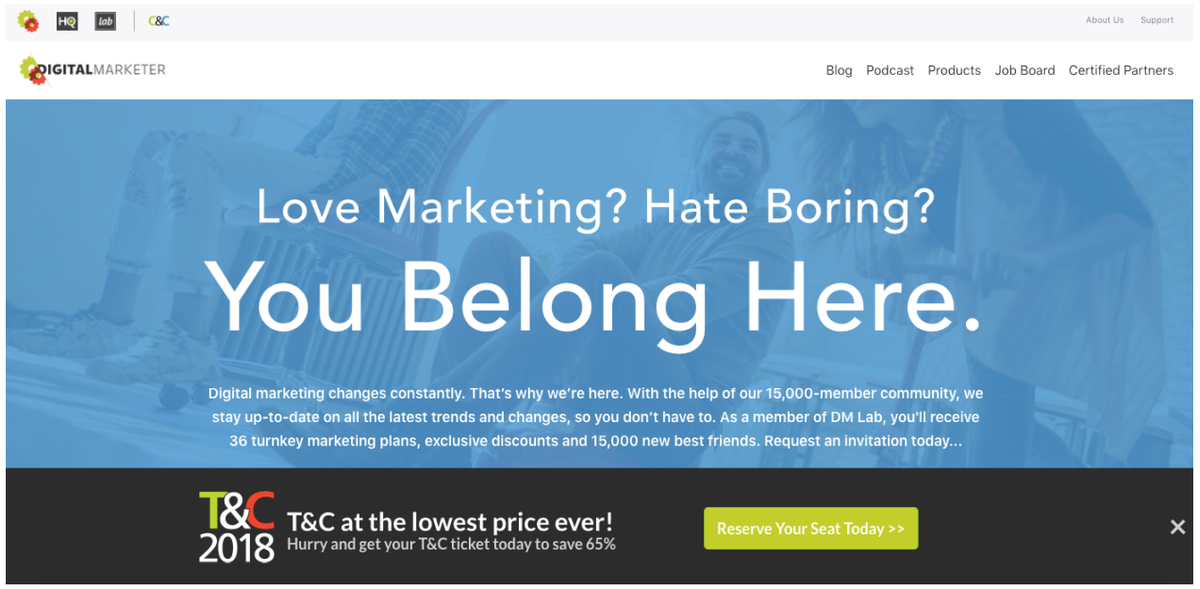
What Is It?

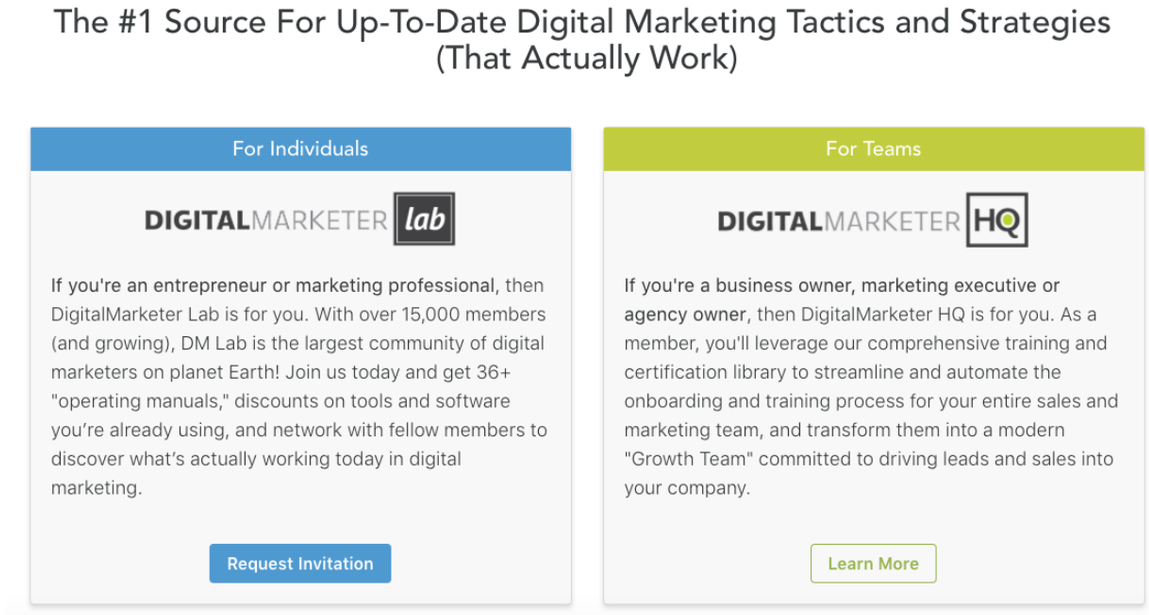
As your business grows, you'll start to amass a lot of internal knowledge that you want your whole team to become familiar with.

Having a membership site to host internal training, onboarding videos, exercises, and other resources is extremely efficient. You can keep track of who on your team is up to speed, and easily onboard new team members.

Setting up an onboarding process is essential to a business' success. As a bonus, you can turn it into a profit center by selling access to it to other business owners.

One company that has done just that is Digital Marketer. In their DM Lab and Certifications, they offer "execution plans" that were originally internal processes for campaigns and marketing tests they performed.





Which clients it attracts:

This type of membership site has 2 stakeholders: the internal team and the external businesses who purchase access to the training. The internal team members are obviously not paying customers, but they will shape the content and the format of the training... and may even help create some of it.

The paying clients are the other businesses that want access to your team training. These are likely companies within your own industry, though some may come from other industries. The trick to promoting this type of membership site is to remember that you're giving away your operational and team system to help improve someone else's team training and results.

You can charge a premium for this information, since this is the operational "magic" that determines whether a business will grow sustainably or get bogged down on the minutia.

How to create it:

If you're working with a team, you've likely already started recording short training videos on how things are done in your business. You might have even started to create a company wiki to house this information.

The next step is to put your training and company materials into a membership site, then add gamification and process tracking to take it from "just a training video" to a complete learning experience.

This will make it easier to sell access to your membership site, since you'll already have all of the information in an organized format. Any other business owner can then send their own team through and enjoy the results.

If you do go live with your content, you might want to hold back some material from the general public that's more specific to your company. This can be done easily by using a tag-based CRM to control access inside your membership area.

Why you might consider it:

A solid internal training program can strengthen any growing team. As your business grows and requires more team members to function, it will become a no-brainer to have this program in place. Not only will it free you up from doing 1-on-1 training, but it will also ensure that everyone is on the same page.

6 Internal Training Turned Profit

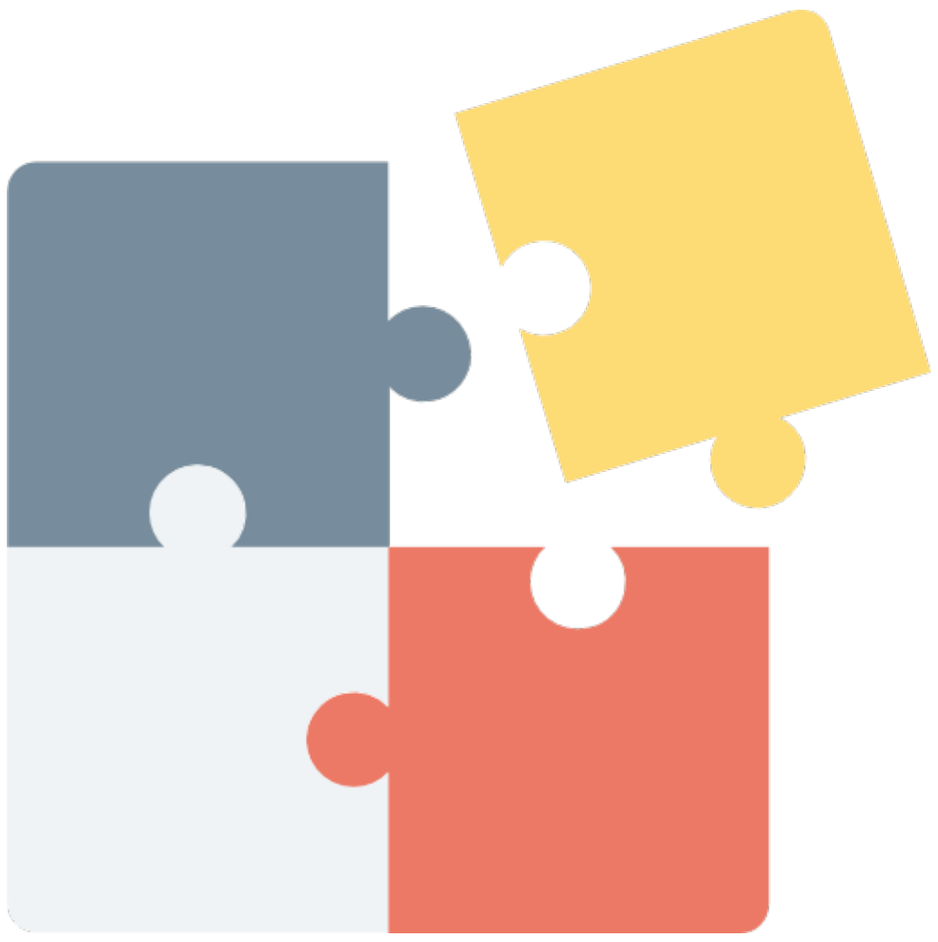
Going beyond that, you'd want to consider opening up your training manual and membership area if you're receiving demand from business colleagues and other businesses!

UP NEXT:
(Bonus) The Mix and Match

“Problems are not stop signs, they are guidelines.
-Robert H. Schuller

BONUS Membership Type # 7

The Mix and Match Membership

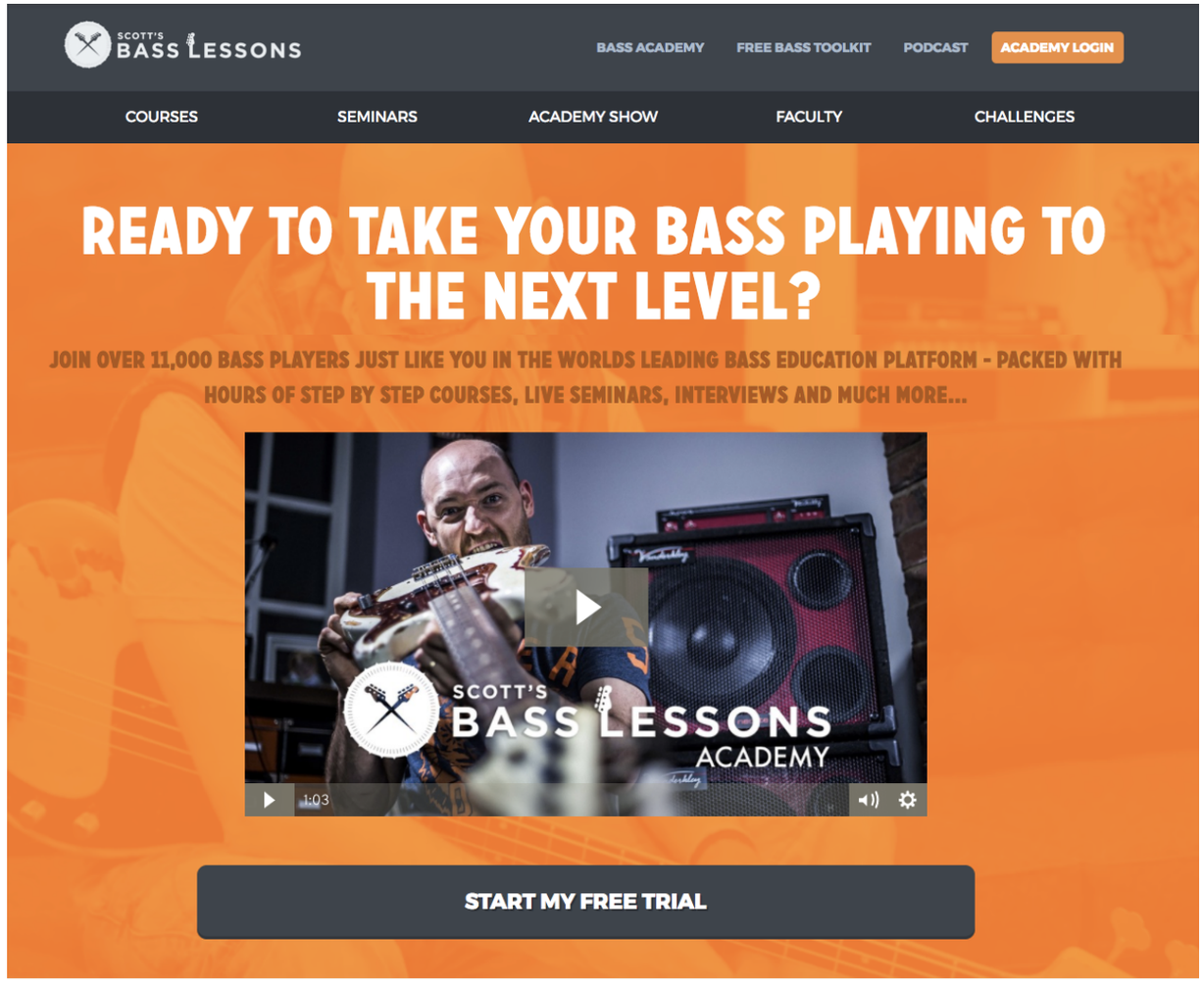


What Is It?

If you've been reading about the types of memberships out there, but can't seem to decide on just one... then you'll love the Mix and Match membership offering. This type simply combines various elements from the other six styles. All you have to decide is which aspects you want to include, then communicate it to prospective members.

One example is Bass Academy, created for those wanting to learn to play guitar. It offers training videos, weekly live seminars, a forum, and much more.

Another example is School of Motion, which combines teaching assistants with live and pre-recorded lessons.



Which clients it attracts:

With a mix and match membership, you'll likely be able to keep people on board for a longer period of time. This happens because there's always a next step or more advanced feature for your students to take advantage of as they progress.

However, one issue with offering too many different features is that it can overwhelm new members. They may feel as if they're not able to take advantage of it all... and simply throw up their hands and cancel because it's just too much.

The best way to address this issue is to create a guiding system that brings your clients from one step to the next. This step-by-step "roadmap" can make it easier to for your students to see and obtain the value out of their membership, whether it guides them to one course that logically follows the next, or moves them from the basics into more interactive formats as they progress.

Although it might seem as though you can charge a premium price for a robust "mix and match" membership because of all the features, that's not necessarily the case. **Your pricing structure always depends on your market and topic.**

How to create it:

Make a list of the different touch points that your membership site will offer. Compare these points with the different tech tools and systems at your disposal.

Another important component to plan out is how much time you'll need to invest to keep all of these offerings going.

For example, if you're offering bi-weekly coaching calls, 3 done-for-you downloads, 1 new video course per month, and a forum... Consider how much time it will take to deliver and maintain the materials. There may be ways for you to "batch" certain things like creating your courses or downloads, but many of the live elements will need to happen on a real-time basis.

The final thing to consider if you're using more than one platform to deliver your membership site is how you'll connect each of the platforms.

A probable solution is to use a CRM that can automate a lot of your tasks, such as sending email reminders for live events and when courses get released.

Why you might consider it:

This mix and match membership option is great because it can be tailored to your ideal clients while filling a void in the market-place.

It allows you more variation in how you express and teach the material in your business. That, in turn, can deliver a lasting transformation for your members.

> *"Your website is a never-ending spiral: there is no done, but each time you revisit and refine it, it gets better.*
> *-Nathalie Lussier*

Your Membership Offer Checklist

Type of Membership Site	Weekly	Monthly	Quarterly	Yearly
Community Focused Memberships				
All You Can Eat Buffet				
Coaching and Accountability				
Done For You Resources				
Retainers and Other Service Memberships				
Internal Training Turned Into a Profit Center				
The Mix and Match				

The 5 Ongoing Challenges of Building a Membership Site (And How to Avoid Them)

The 5 Ongoing Challenges of Building a Membership Site (And How to Avoid Them)



If you've ever tried to start a membership site before (or read horror stories from those who threw in the towel!) then you'll know that it comes with a few challenges.

There's the initial launch, where you need to have enough interest to get your membership site off the ground and selling.

Then, there's the inevitable drop off of subscribers and members, which means you need to sell more to keep your membership numbers stable.

In this section, we'll cover the 5 most common ongoing challenges that all membership site owners face. Identifying the pitfalls can often be enough to prevent them from happening, and in each section I'll share how you can overcome them with strategic use of the AccessAlly plugin for WordPress membership sites.

You'll learn a ton about designing your membership site whether you choose AccessAlly or not, but for our examples we'll show you specifics from this solution.

Ongoing Challenge # 1

Attracting Leads and Getting People to Opt-In



The average opt-in rate of a blog or website is less than 2%... that means 98% of visitors are not joining your list.

In order to sustain your membership site and sell your courses, you need people who are interested enough to actually consider your offers.

That's where building an engaged list of subscribers comes in.

The Key is Standing Out Against the "Same Same" Opt-In Offers:

If there are other business owners and bloggers in your space, chances are high that your opt-in will be judged against theirs.

There are 2 ways you can differentiate your opt-in gift so that more people say yes and join your email list, starting with:

The Login Optin™ Strategy

The Login Optin™ Strategy uses the power of a membership site to nurture subscribers and build a strong relationship that leads to more sales.

Instead of using the same-old "opt-in gift download" this strategy offers a free course. When you create your opt-in, it sends the new signups straight into your membership site to access the free course.

This gives a few opportunities for you to:

- Follow up with subscribers based on whether or not they've accessed and consumed your content.
- Expose your signups to your paid offerings and courses under one membership site using a course dashboard.

In turn, this strategy ultimately leads to organic cross-selling and increased sales.

The Login Optin™ Strategy: Offer a free course inside your membership site.

There's a powerful psychological buy-in that happens when someone logs into your membership site… now "they're in".

A free opt-in course is valuable even if similar information is available for free, because it is organized and easy to absorb with simple action steps.

Plus, when you deliver a high caliber course as your free offering, it leads to…

Word of Mouth Marketing: Ask Fans to Spread The Word About Your Opt-In For You

Make it easier for members who are logged in to share your free courses on social media and send their friends to your opt-in page.



With great content and a clear call to action, you'll encourage your fans to help you spread the word.

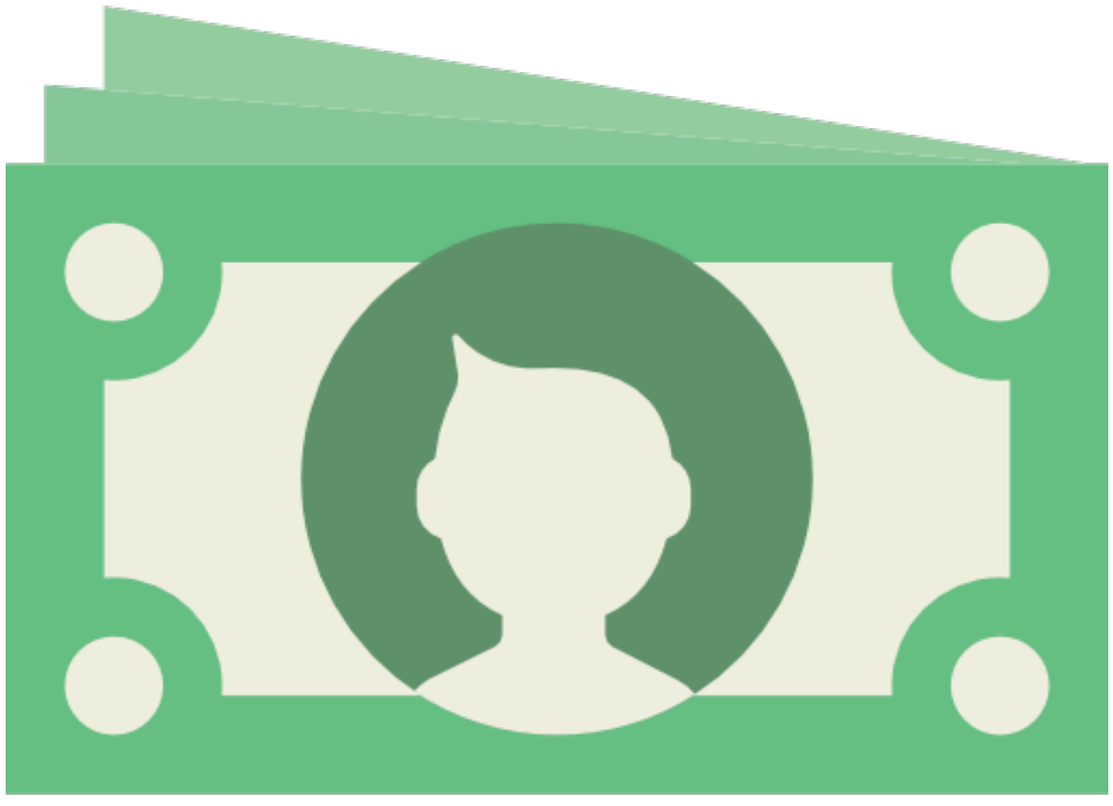
In fact, word-of-mouth has been shown to improve marketing effectiveness by up to 54%. [MarketShare]

It's easy, but powerful.

UP NEXT:
The Challenge of Converting Leads Into Happy Paying Customers

Ongoing Challenge # 2

Converting Leads into Happy Paying Customers



Nurturing your subscribers right inside your membership site

Once you've figured out a way to get more people to join your email list, you need a way to tell them about your paid courses and offerings.

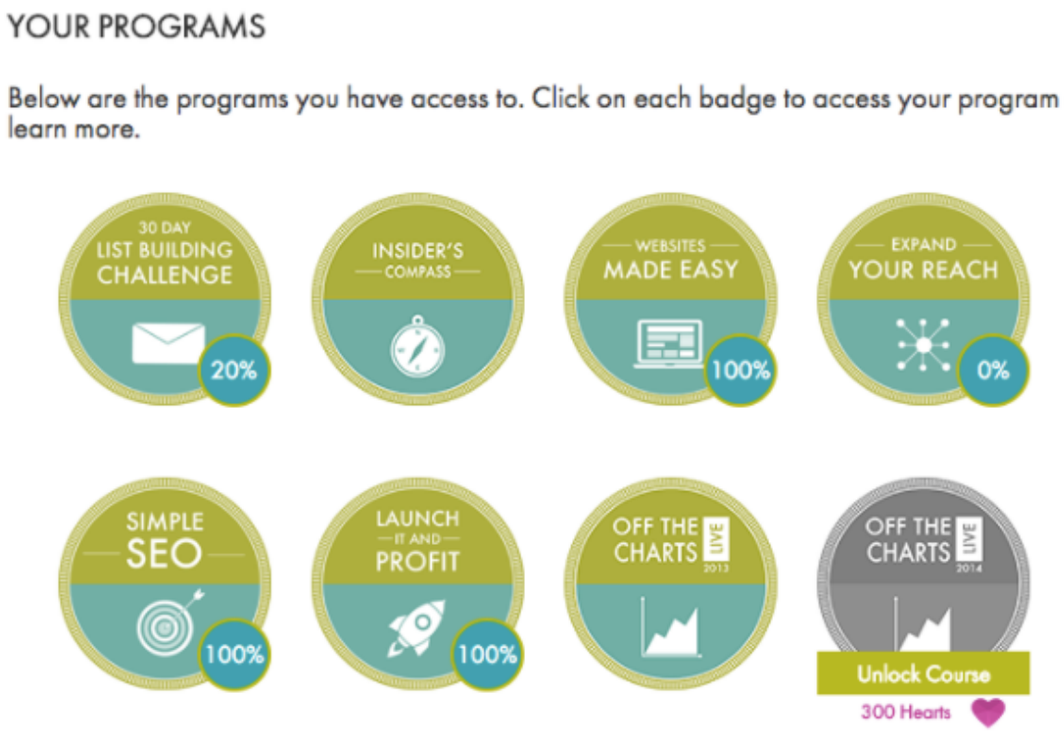
The standard email marketing funnel works well... but if they don't buy from that method, there are more organic ways to get them to purchase your paid offerings.

Make Your Free Course Naturally Lead Into Your Paid Offers

Here's why it works:

- It’s easier to get people to continue the journey than to get them to start in the first place.
- Using the freemium model means you offer something amazing for free. Then, if your paid offering (the bigger or next course, the service, the coaching program) is a natural next step…
- Your conversions can range from 1% to 10% of members becoming paid customers.

Cross-Selling Member Dashboards



Offering paid courses on your dashboard makes it easier for members to see what else you have to offer.

2 Converting Leads into Happy Paying Customers

It also taps into the human “gotta collect them all” drive, kind of like grabbing a snack at the checkout line while grocery shopping.

This increases sales in a non-smarmy way... and it works.

It’s the same method that sites like Amazon use to get you to add “just one more thing” to your cart before checkout.

UP NEXT:
The Challenge of Having a Leaky Checkout Experience and Losing Out On Sales

Ongoing Challenge # 3

Having a Leaky Checkout Experience & Losing Out On Sales



Shopping Cart Abandonment Means You Lose Out on Sales

Once you've done all of the hard work of creating a free course and getting people to say yes to your paid offerings... you definitely don't want to lose out on the sales by having a leaky checkout experience.

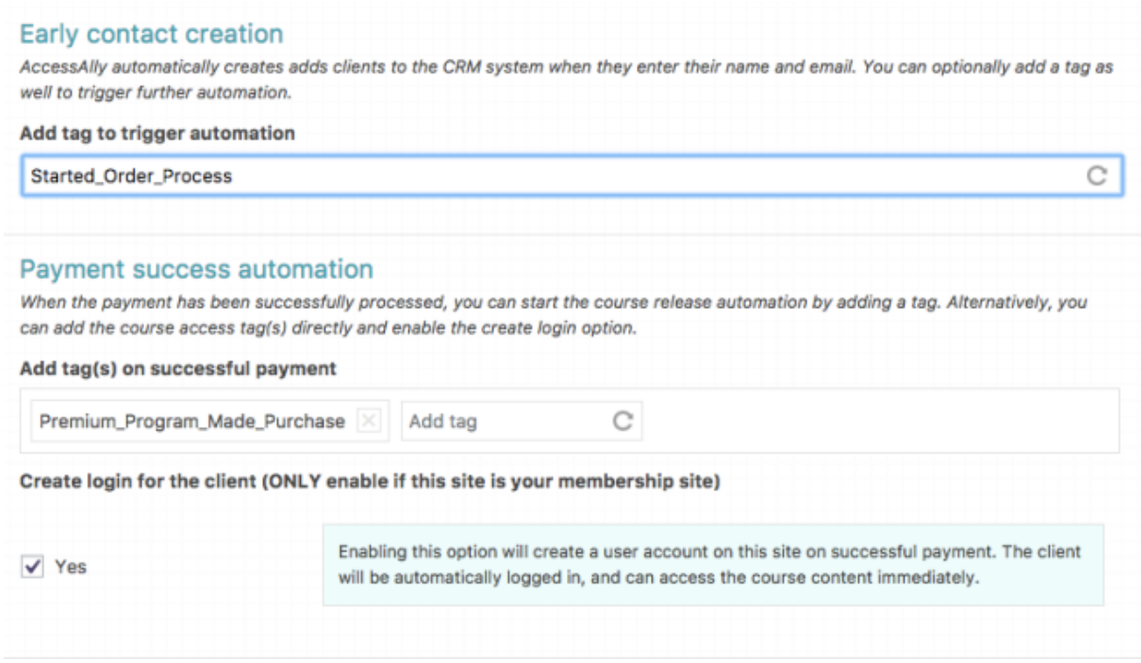
- Did you know that 77% of people who click the “Buy Now” button never complete their order? [Source]

After all that work you’ve done to get your leads, have them raise their hand to take your free course, and click the buy button, you don’t want to lose momentum. That’s why you need:

Mobile-Friendly Order Forms with Follow Up on Abandoned Carts

Once someone begins the purchasing process with AccessAlly order forms, you can tag them and follow-up if they don't complete their order.

This allows you to capture lost sales, and even offer special incentives like individualized and timed promotion codes and discounts.



UP NEXT:
The Challenge of Increasing Return Customers and Recurring Revenue

Ongoing Challenge # 4

Increasing Return Customers and Recurring Revenue



Your job isn't done when you've got your first customers...

Chances are high that you can continue to offer more solutions, courses, and ongoing support to these same customers over time.

That's where offering different courses and programs that complement each other comes in.

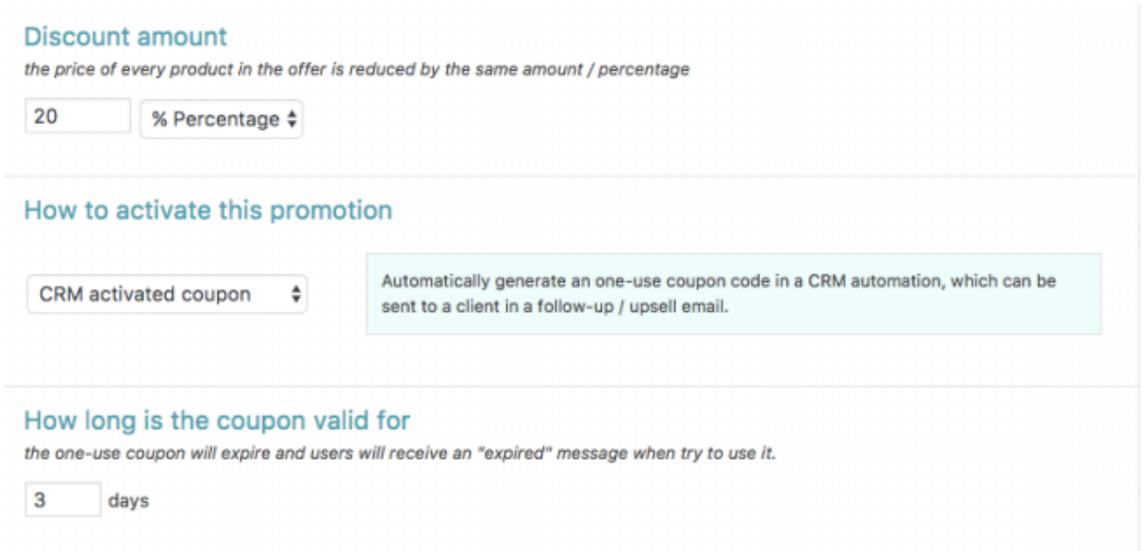
Why?

Chasing New Customers Is More Difficult and Expensive

- The probability of selling to a new prospect is 5-20%. The probability of selling to an existing customer is 60-70%. [Marketing Metrics]
- It can cost 5x more to acquire new customers than to keep current ones. [The National Law Review]
- There are many ways to increase customer lifetime value, and deliver better customer experiences using a smart membership site model.

Special Timed Offers

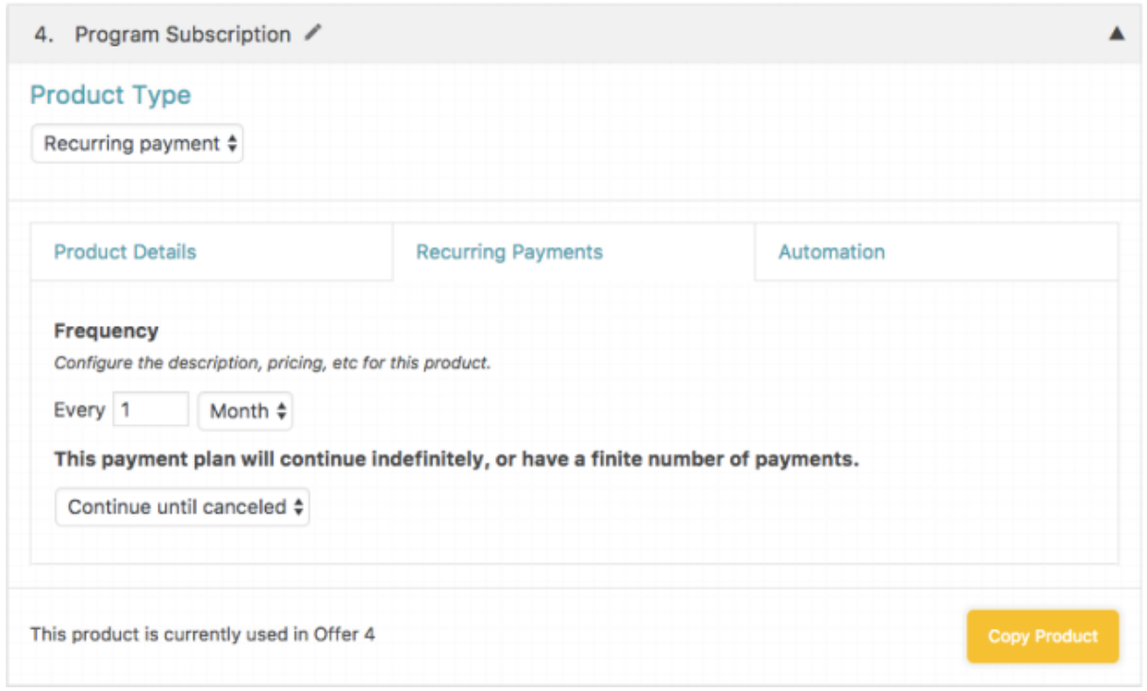
With AccessAlly you can offer the right discount or product at the right time... with a built-in expiration that's specific to each member.



Accept Recurring Payments

Another really easy solution to getting your customers to stay on as clients is to offer recurring payments for your member-

ship, so you don't need another tool to keep them coming back month after month.



UP NEXT:
The Challenge of Customers Who Fall Off the Wagon and Cancel

Ongoing Challenge # 5

Customers Who Fall Off The Wagon and Cancel



Member retention is key to the long term success of your membership site.

But it's normal for members to fall off the wagon, get busy, and stop logging into your membership site.

... Or is it?

If you use some of these nurturing strategies, you can keep your members engaged and actively benefitting from their membership and course access.

Do You Stop Following Up With Customers After The Sale?

It’s easy to focus on “the next customer acquisition” activity, but if you stop taking care of your existing customers, you’re sabotaging your business and shortchanging your clients.

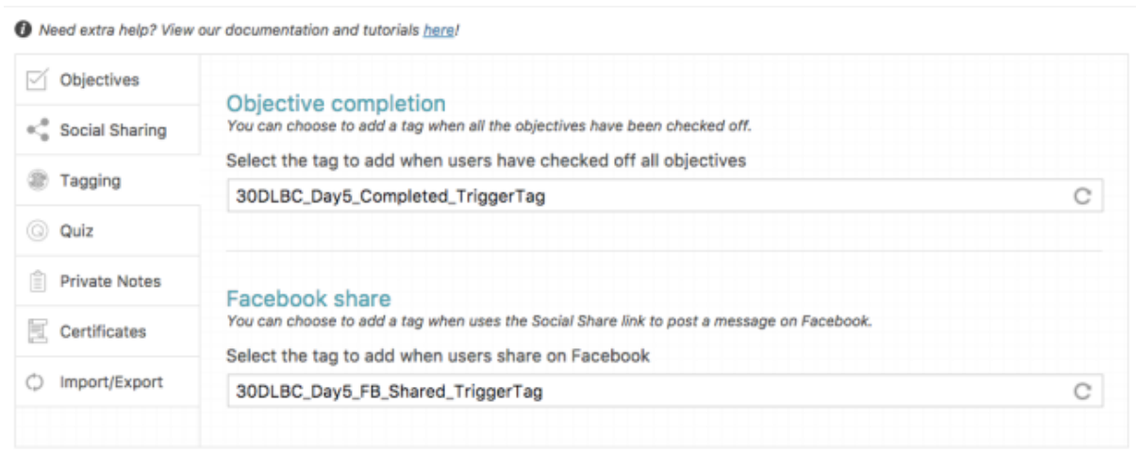
- 68% of customers leave because they perceive you are indifferent to them. [Forbes]

But don’t worry: it’s easy to take care of every client and tailor the customer experience to their actions just by using your membership site and smart email campaigns.

Individual Follow-Up

Apply tags based on people's actions in your membership site: when they're logging in (or not logging in within a certain time-frame!), or completing any modules, lessons, or courses.

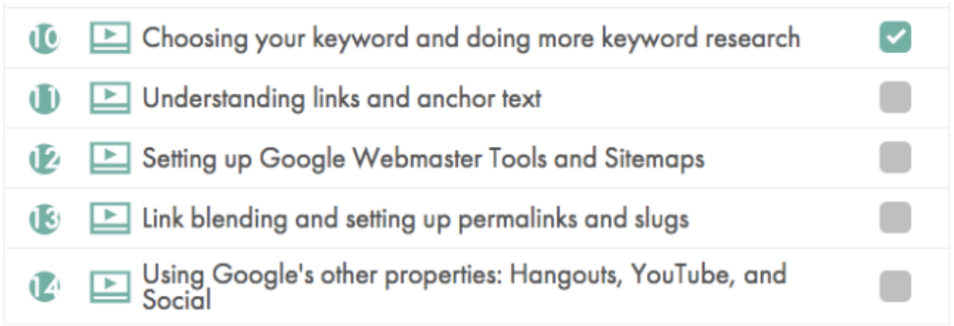
The tags then give you the ability to tailor individual follow-up sequences in your CRM system.

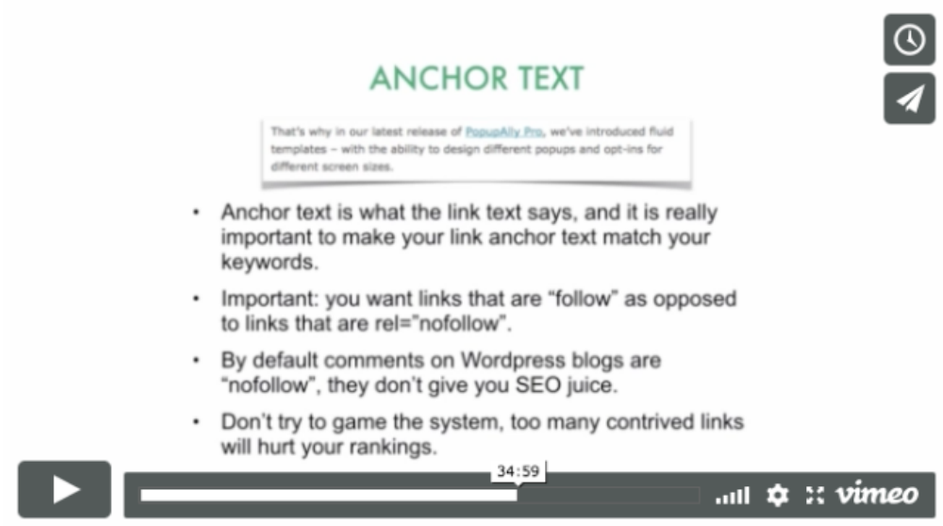


Progress Tracking & Video Bookmarks

There's nothing like having to watch a full video again to find that one piece of information you're looking for.

With video bookmarks, you can give students an easy way to play a video from the right spot, and keep track of how much of the videos people are completing, too!



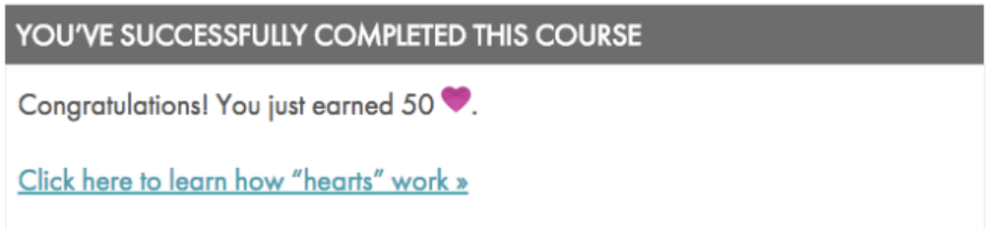


Reward Points

Offer gamified reward points for certain actions that occur inside your membership site, like completing a course, a quiz, or sharing on social media. These points can then be redeemed for any number of prizes or bonus content.



- Module 1: Before your write your book...
- Module 2: Formatting and publishing your book...
- Module 3: Promoting your book...



Certificates

Reward and celebrate members' accomplishments with an auto-generated certificate of completion that students can download when they finish a course or program.



UP NEXT:
The 10 Criteria for Choosing your Membership Site Solution

10 Criteria for Choosing your Membership Site Solution

10 Criteria for Choosing your Membership Site Solution

Now that we've covered the most important considerations for the content, sales strategy, and focus of your membership site...

It's time to address the big question that can keep you searching in circles for hours: what tech tools will allow you to create this membership site with the least headache?

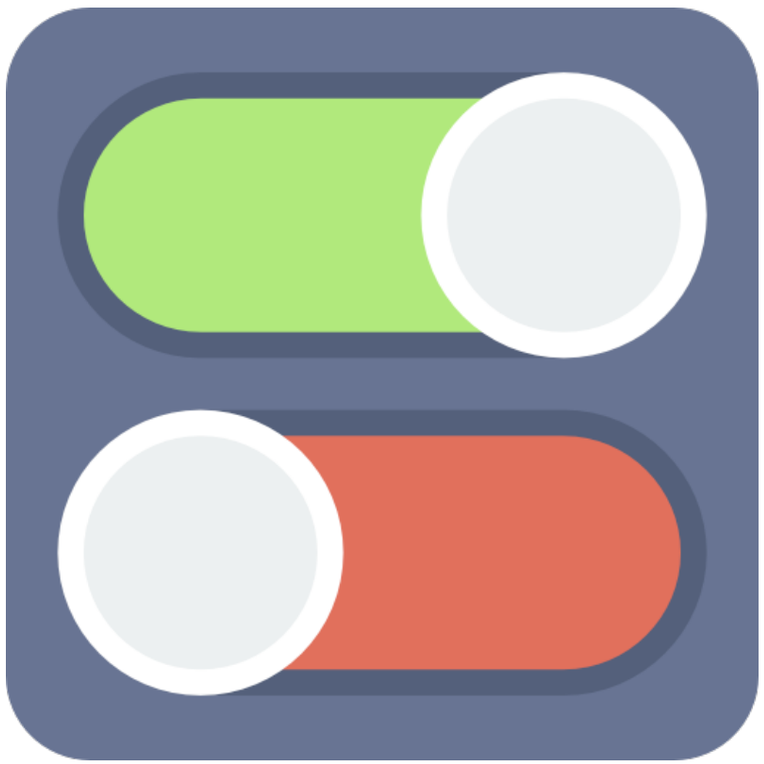
This section will shortcut your decision making process, and help you get going with the fun part: creating your courses and memberships themselves, and connecting with your members!

In this section, we'll go over the 10 most important things to look for in your membership and course solution. This will help you to make the best decision to cover your business' needs today - and in the long run.



Membership Solution Criteria # 1

Choose a Tool That Matches Your Tech Ability and Is Flexible Enough To Meet Your Long Term Goals



Start With Your Foundation: WordPress or Something Else?

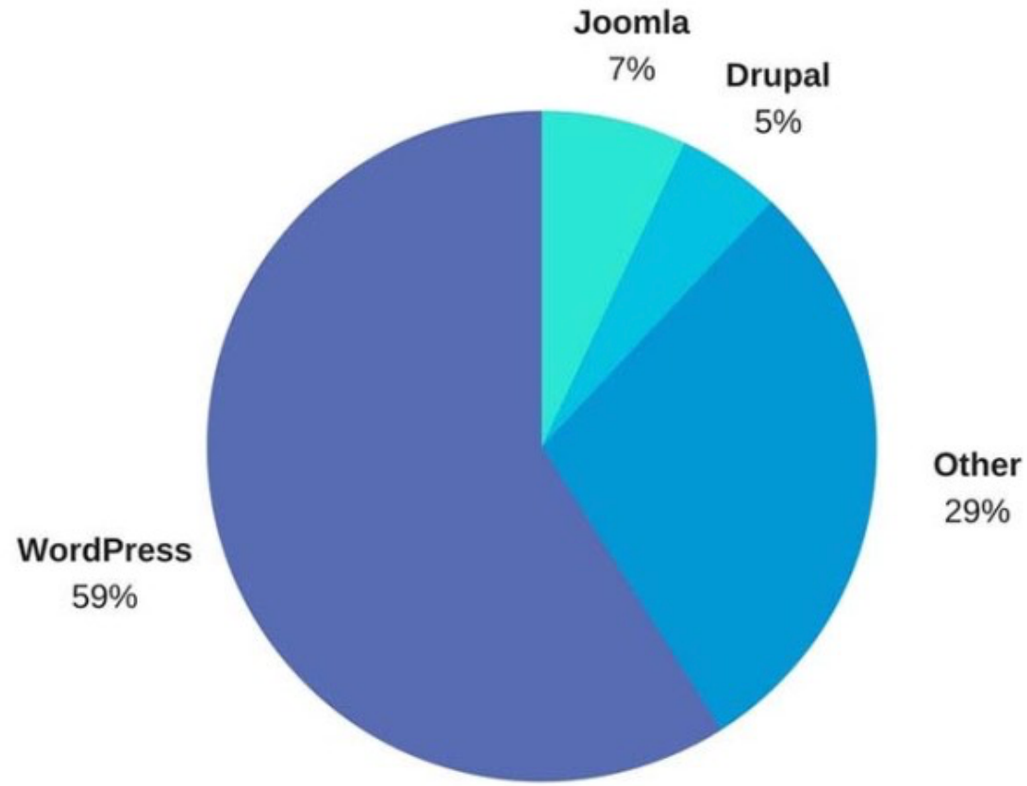
Before we dive into this discussion, I want to share why I recommend WordPress-based membership solutions for most businesses.

Yes, there are other options on the market, but there are many reasons that WordPress powers 59% of all content management sites on the web.

WordPress is used by some of the most widely recognized brands in the world:

- The New York Times
- CNN
- People Magazine
- National Geographic
- Forbes
- Vogue

Why is it such a widely chosen system and why would you want to build your membership site on it?



WordPress is an open-source platform, which means you are free to use the software any way you like. Unlike sites hosted on WordPress.com, SquareSpace, Kajabi, Teachable, Thinkific, and other "hosted platforms", you have complete creative and functional freedom.

1 Choose a Flexible Tool

The WordPress software package is licensed under the GNU General Public License (GPL), meaning that anyone can use, copy and distribute the software itself.

This means that the software is freely available, and it's also being maintained by hundreds of incredibly talented developers from all over the world.

The WordPress community is growing and there are new plug-ins, themes, and add-ons being developed every day. WordPress is also available in 56 languages.

Plus, you have full copyright to the content you add, and you won't be surprised by changing features or fees down the line.

Evaluating different membership site solutions brings up the story of Goldilocks and the three bears...

Overly complex options

On one side, you've got course software that's super complicated and requires custom coding, memorizing shortcodes, and stringing together different plugins to do what you want to do...

These WordPress solutions are often "too big" for your business to take on alone, and end up costing you way too much in developer fees. (You could end up paying upwards of $20,000 for a membership solution this way... and you'll need to keep paying to be able to maintain and update it!)

Overly simplified options

On the other side, you can choose a ready-made solution. But these are often too simple: you can't achieve the results you want – like being locked into certain templates, or unable to create the marketing flows you need.

These ready-made platforms are "too small" and will limit the growth of your business, forcing you to re-do the work of setting up your site on a longer term solution.

Finding the option that's "just right" for you

Right between the two extremes is where AccessAlly comes in, for small business owners who want to provide online courses and ongoing memberships with a focus on long term results.

AccessAlly is the Only WordPress Membership Plugin and Course Creation Tool Powerful Enough for Programmers, but Designed for Marketers.

Most of the flexible WordPress plugins you might consider require so many clicks and will take forever to set up. Business owners who choose these may spend months setting up their membership sites. You'll see the differences in-depth throughout this section.

You need a solution that's the "right size" for your business.

1 Choose a Flexible Tool

The reason AccessAlly offers such a balanced approach is because it was created by a team of digital marketers with a solid software engineering background.

We tend to look at things a little differently, because we've run successful online courses and memberships for years.

Plus, we actually use the tools we create to power a key part of our business: our own membership site.

So not only do you know that these tools work for real, successful businesses, but you can also be confident that we're going to keep building the features that support the real needs of an online business... because our own marketing efforts require it. As a result, your marketing efforts are made easier, too.

Bottom line: you want to choose a WordPress membership and course creation plugin that makes setting things up easy, but has the flexibility to grow with you - or to be expanded on by developers, if you so choose.

Membership Solution Criteria # 2

Choose a Tool with Deep CRM Integration for Tag-Based Automation



Put Customer Relationship Management at the Core of Your Membership Site

One of the biggest philosophical differences between old school and more modern membership options is the concept of protecting content based on tags versus the old “membership levels” format.

With many older WordPress membership site options, you need to create separate membership levels and somehow try to match these up to orders inside your Customer Relationship Management system.

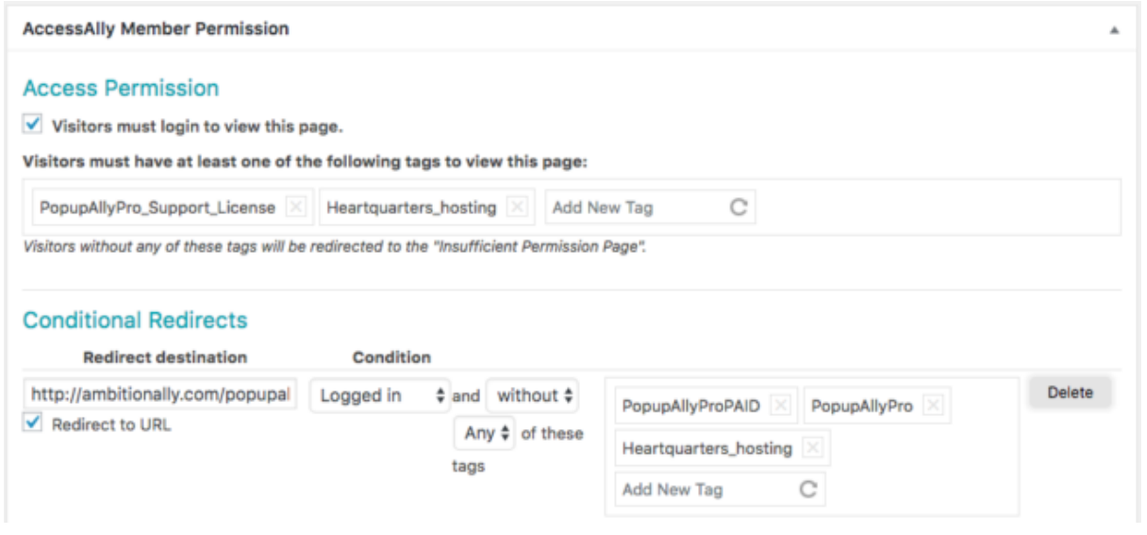
Many modern day CRMs like Infusionsoft, Ontraport, ActiveCampaign, ConvertKit, and Drip allow you to tag customers based on the actions they take. Since this is where your customer information is held, you'll want a membership site that works and acts with the same tags.

Don’t Use a Model That Creates More Work For You

The “levels” way of organizing courses and memberships adds an additional layer of setup because you can't just use the tags you're already using inside your CRM. It also makes it harder to update (and maintain) as your business grows and you continue to add more courses or “levels”.

With AccessAlly, everything is purely tag-based… which fits in perfectly with how tag based CRMs work. It also leads to really cool automation workflows that create a very unique member experience.

When you're using AccessAlly and apply a tag in your CRM, it will affect the permissions of the member(s) in your WordPress membership site.



This makes it so easy to add courses, drip feed content, and use tags to unlock bonus areas. Not to mention the tagging system allows you to easily follow up with people when they complete a module or go through a “challenge” online, since AccessAlly can add a tag when they accomplish those actions.

Because the course tag functionality is designed to go hand-in-hand with your CRM's tags, you also want your WordPress membership site plugin to have deep 2-way street integration with your CRM.

This means you can have actions in your membership site trigger automations in your CRM, and vise versa.

Conversation is a Two-Way Street

With AccessAlly, the CRM integration works both ways: if your member takes an action in your membership site, you can apply a tag back into your CRM to kick off a follow-up campaign or run other automations.

You may also want to store custom fields in your CRM (like someone's address, their birthday, or something specific like what their favorite color is!). In this case, you'll want to be able to access and update a member's custom fields through your membership site and back into your CRM.

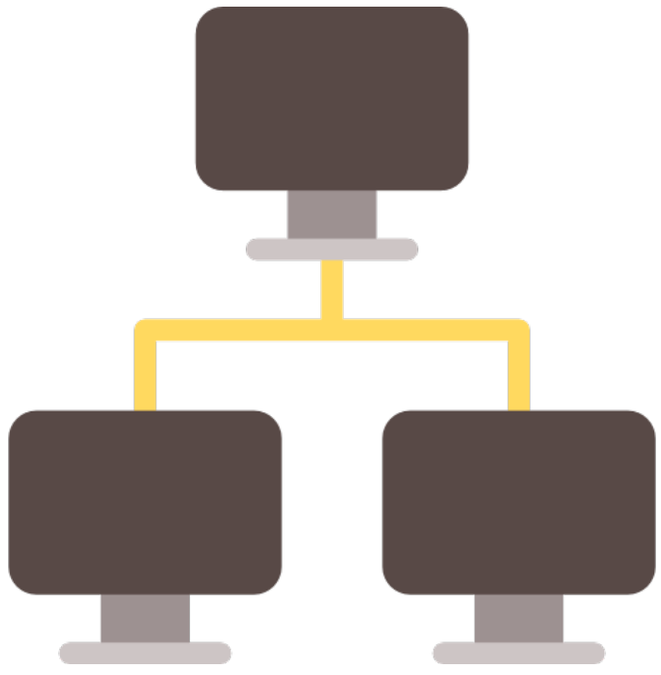
This is handy for things like:

- Unlocking bonus content
- Updating credit cards and making outstanding payments
- Making time-sensitive offers based on actions
- Doing 1-click upsells
- Offering other interactive perks for engagement with gamification

Bottom line: You can use tags to powerfully automate, cross-sell, and keep members engaged in your online courses with AccessAlly.

Membership Solution Criteria # 3

Choose a A Fully Functional End-to-End Suite of Products (That Also Play Well with Others)



Extend the functionality of your site with WordPress plugins

One of the benefits of using WordPress for your membership site is that it allows you to extend the functionality with a bunch of different plugins.

But the downside is that you can get into a pickle trying to integrate a bunch of plugins that don't play nice together.

This creates a duct-taped system that can easily fall apart as integrations and code changes occur over time.



For example, if you're looking to add a learning management system, some gamification, social sharing, community directories, payment integration, and progress tracking…

Each of these could mean installing yet another plugin or paid add-on.

The chances of getting each of these WordPress plugins to talk to each other and do what you're trying to accomplish are pretty slim… especially when you add in regular updates.

(Not to mention that the costs can add up significantly with each new vendor added to the mix.)

Duct-Tape Isn't A Good Tech Solution

Instead of trying to duct-tape different plugins together (and seeing the costs stack up!) you can choose a solution that is built and supported by one company and works seamlessly from end to end.

That's the idea behind AccessAlly.

You get all of the functionality you could want for your membership site – from the ability to take payments directly, to delivering your online courses, and doing all of the gamification and online learning you'd get in an LMS in one place.

You can also follow up with students who aren't progressing through a course, because you have the ability to track all of this data through tags.

Bottom line: With AccessAlly, you don't need to get tools developed by different companies to try to work together. Everything seamlessly integrates to make your membership experience elegant and easy, from opt-in to sale, to login, to learning, and sharing.

"Do not confuse motion and progress. A rocking horse keeps moving but does not make any progress.
-Alfred A. Montapert

Membership Solution Criteria # 4

Choose a Tool That's Built to Sell & Market Well

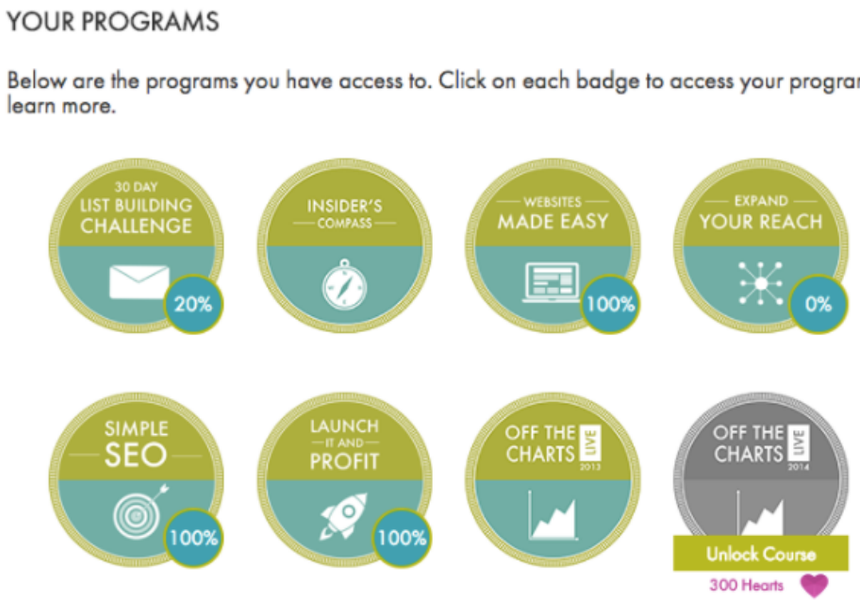


It’s a fact: most membership sites aren't designed to sell.

That's because most tools are built by developers for developers, and don't focus on marketing... They're thinking about the next bug fix or feature addition instead of the user experience.

Cross-Selling Dashboards

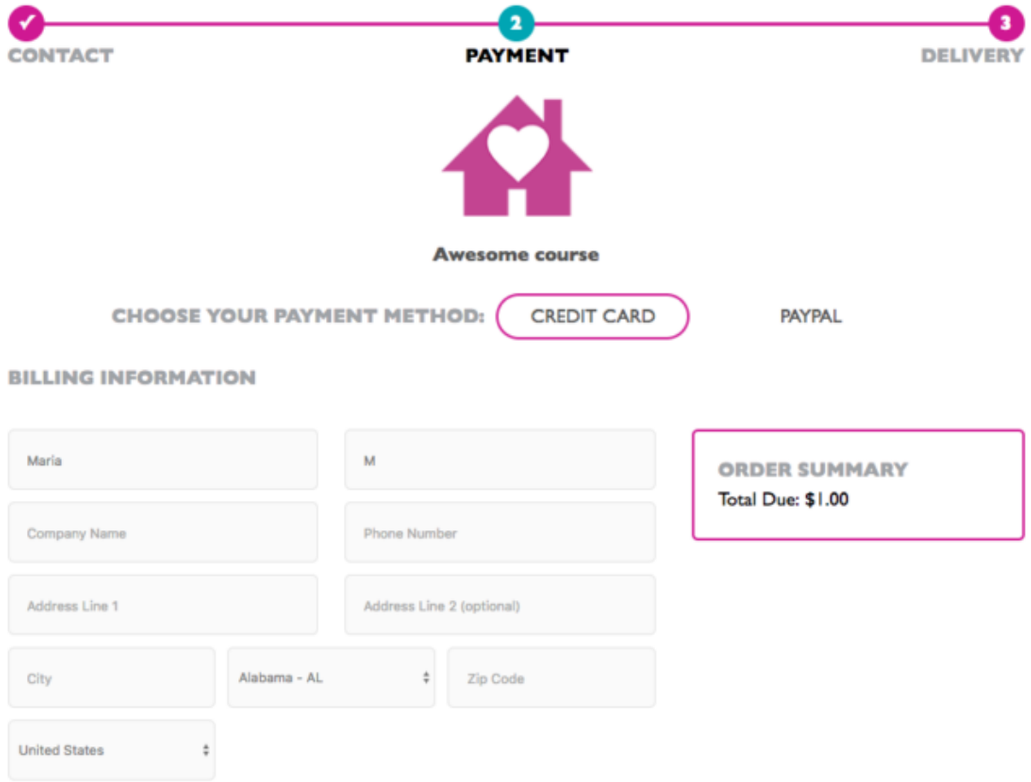
AccessAlly helps you attract leads and convert them into happy paying customers, with The Login Optin™ Strategy. You can easily build cross-selling dashboards for your members that send people to a sales page with just 1 click.



AccessAlly is built and designed to deliver a customized user experience that cross-sells your courses right inside your member dashboard.

Abandoned Cart Follow-Up

AccessAlly also includes unique order form features that plug your leaky checkout experience so you can capture lost sales… All while keeping members engaged and coming back for more.



These order forms are mobile-friendly and straightforward to use.

They're designed so contacts are saved to your CRM the moment they fill out the first step of the order form. You can then follow up with them in the case of shopping cart abandonment.

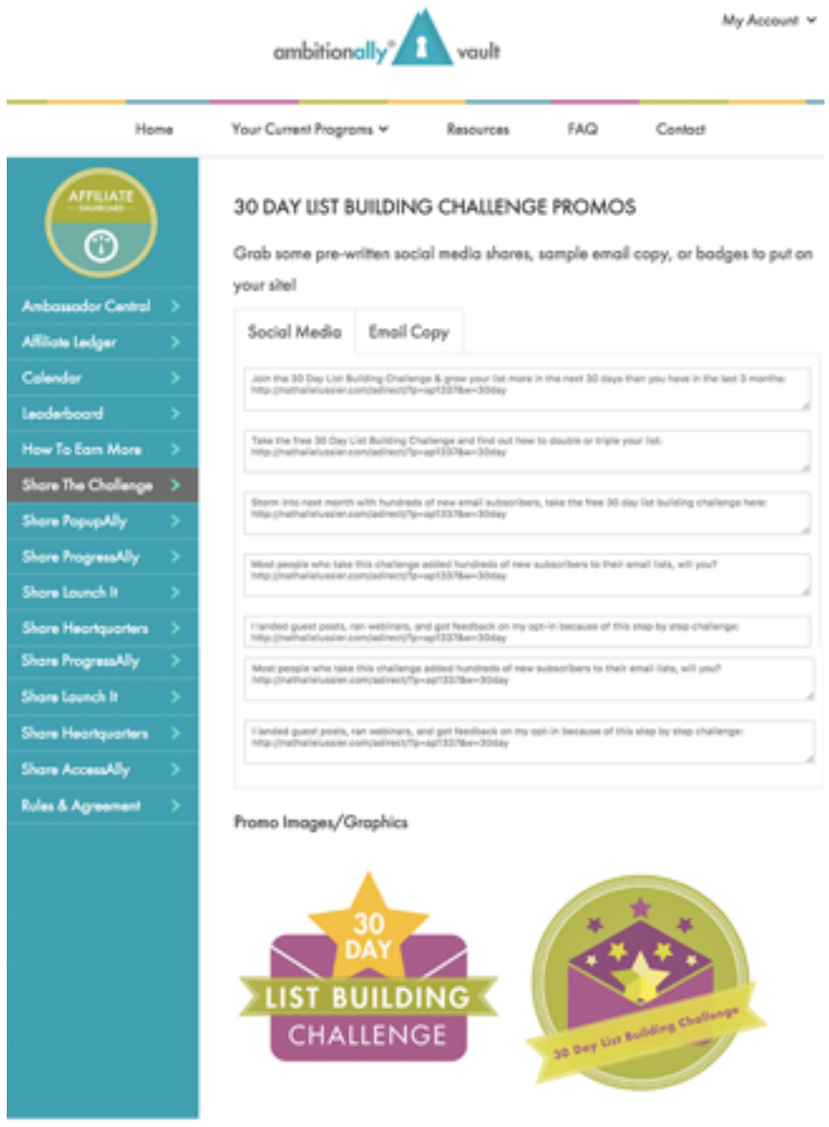
Your membership site shouldn't be just another "expense". It should be an asset that turns subscribers into customers naturally and effortlessly.

Affiliate Centers & Contests

Another great way to increase your sales is by offering an affiliate program, which means your students can earn commissions by recommending your course to their friends. While not every business has an affiliate program, you'll love these features if yours does.

AccessAlly, for example, integrates with the affiliate functionality inside Infusionsoft and Ontraport to create robust affiliate centers (without the need to login to the default Infusionsoft or Ontraport pages).

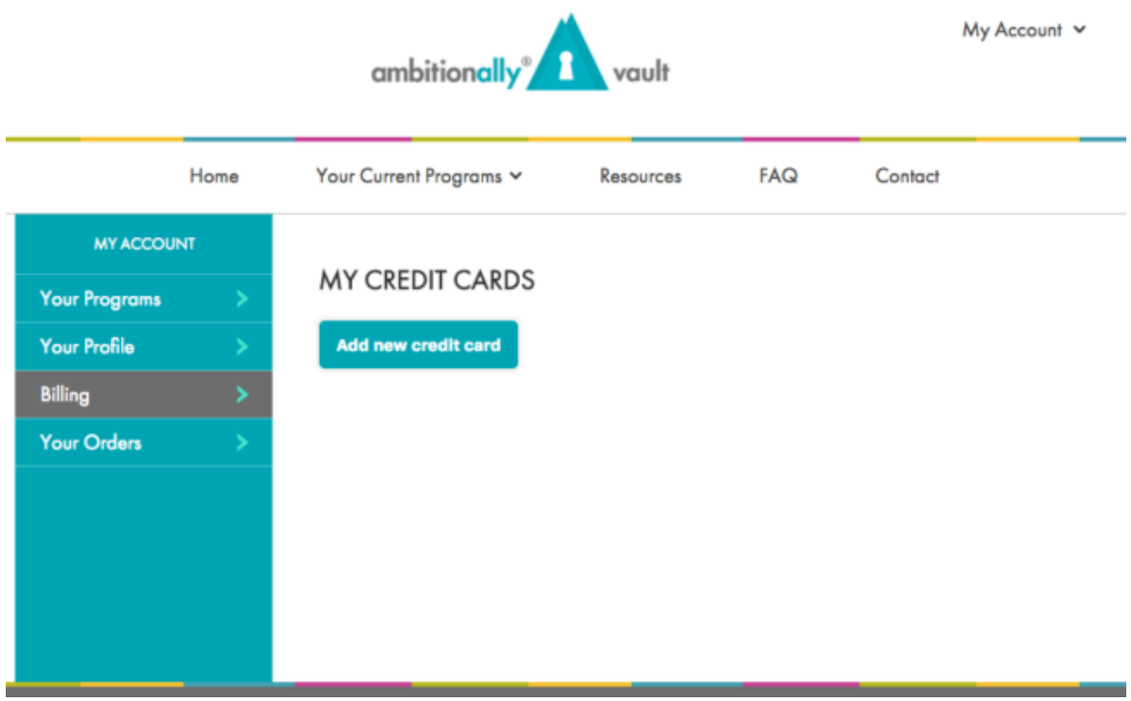
You can easily create pages where affiliates can grab their referral links, see their sales and payments (including the name and email for each sale!) and also participate in live auto-updating Affiliate Leaderboard contests.



Members Can Update Credit Cards and Make Payments in One Place

One of the best ways to keep students engaged and buying more of your paid programs is to keep everything in one central location. The members dashboard does that well, but you'll also want to make it easy for members to update their credit card on file and make payments all from one place.

With AccessAlly you can have customers update their credit card on file and make payments on any outstanding balances. All of these transactions are secure.



Offer Coupons and Trial Offers

There are always going to be people who are interested, but are still on the fence and not sure if your programs are right for them.

That's where offering a coupon or trial offer can give them a taste and get them to take action. You could offer special timed coupons that expire after a certain number of hours or days, or have a special early bird sale.

Similarly, you might give someone a 2-week or one month trial before they become full fledged members.

With AccessAlly you can even combine special offers and coupons with your abandoned cart follow-up sequence to win back potential customers with a one-use only discount.

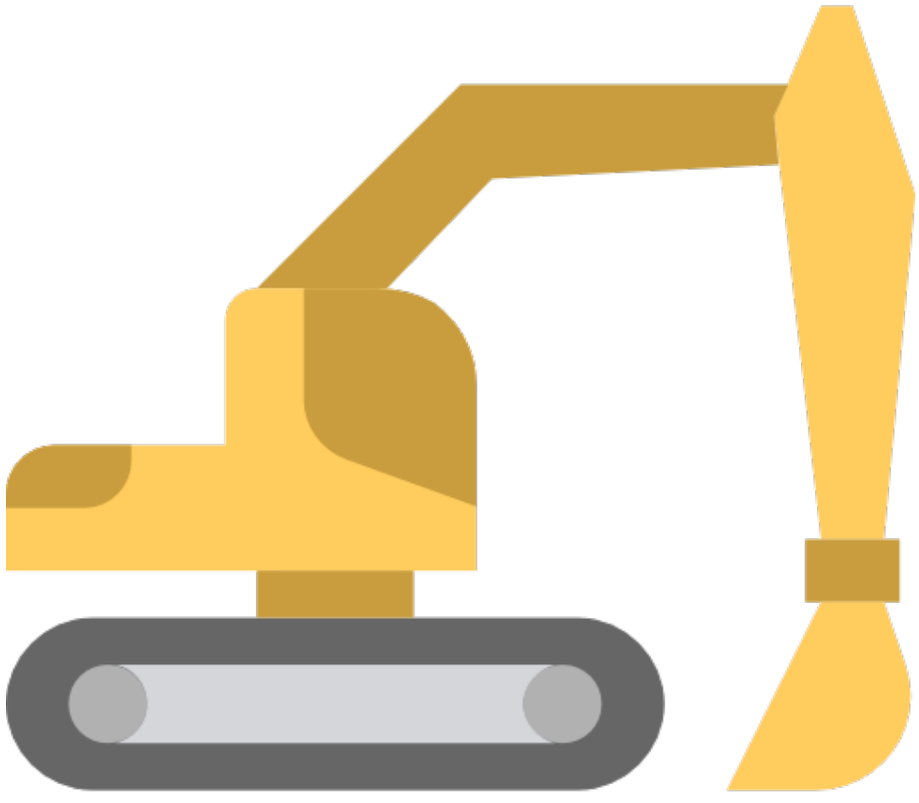
Bottom line: For those who are looking for an easy way to sell products and subscriptions from within their own membership site, AccessAlly offers quick setup and advanced follow-up capabilities. Not to mention cross-selling dashboards and easy payment options!

"The secret of getting ahead is getting started.

-Mark Twain

Membership Solution Criteria # 5

Choose a Tool That Does The Set Up For You



Software should be intuitive and easy to use…

That includes working inside the “back-end” in WordPress when you're setting up your membership, as well as the “front-end” that your members and course participants see when they log in.

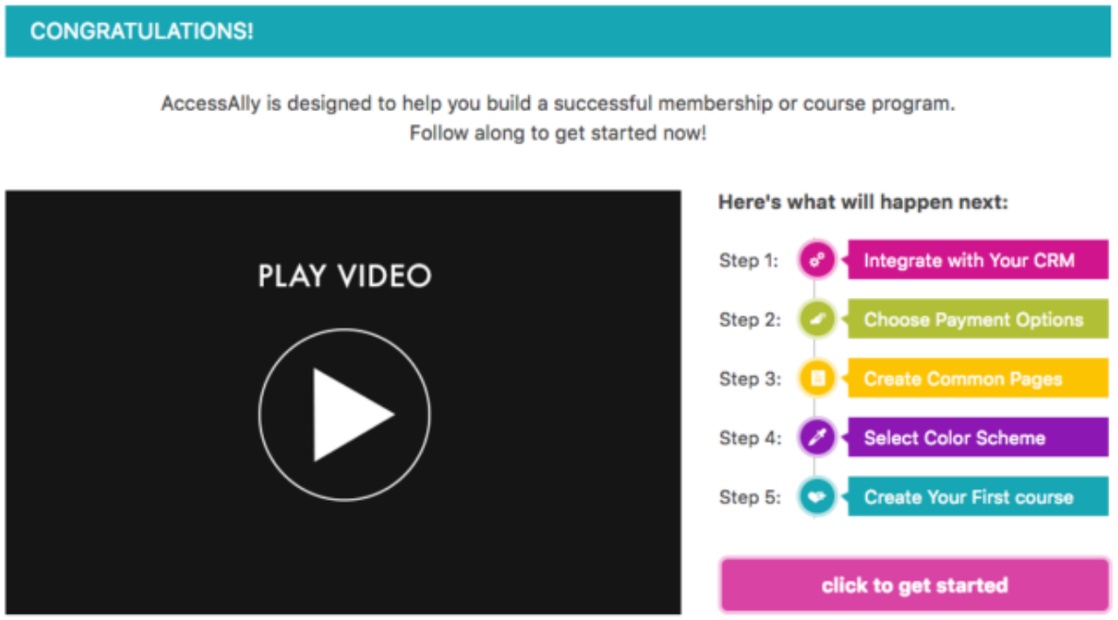
The reality is that most WordPress membership plugins fall flat in both of these categories, because they're designed by programmers… who think in code and functionality, not necessarily about whether it's intuitive for the end user.

That might not be an issue if you're a developer building a membership site on WordPress... but really, who doesn't want to save some time during the initial setup?

Let's take a look at how AccessAlly solves the "set up time" issue, while delivering a great front-end member experience and back-end site owner experience, too.

Easy 5-Minute Onboarding Wizard

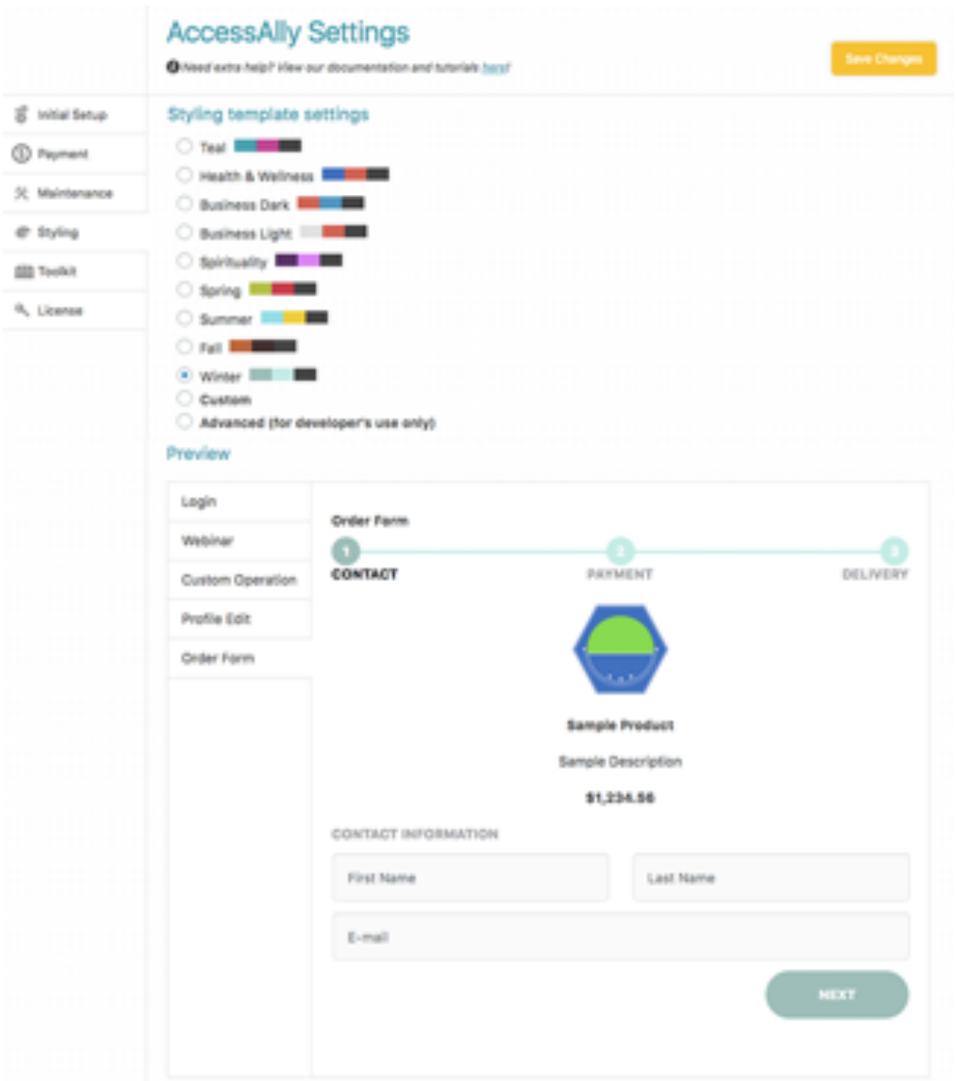
With AccessAlly, the set up is done for you in the first 5 minutes. You'll integrate with your CRM, choose your payment options, have the core pages created for you, and pick a color scheme... From there, it's on to course design!



Style Settings That Work With Any Theme

You definitely want your membership solution to be customizable on its own, no matter which WordPress theme it’s paired with. You want it to offer its own “style settings” that are easy to change and customize without a ton of code (unless you’re

geeky like that, and you want to dive in – in which case we have a CSS option, too).

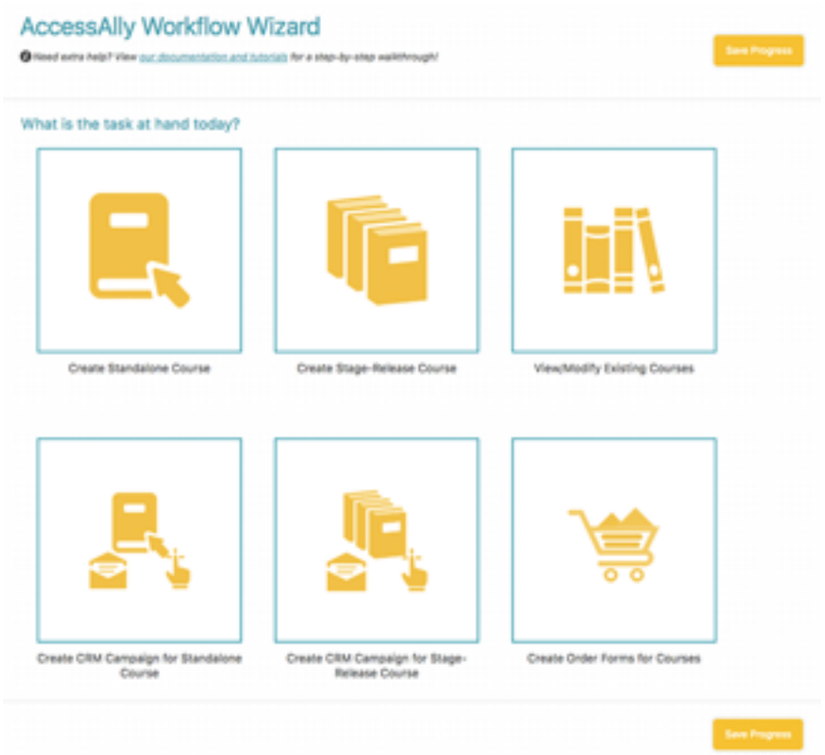


Course Creation Wizards that Do The Heavy Lifting

With AccessAlly, the course creation wizard takes care of a lot of the minutia for you. Simply choose the title for your next course, membership program, or challenge, and AccessAlly will automatically:

- Create the corresponding CRM tags for course access, dripped content delivery for different modules, and refunding / cancellations
- Set up the associated WordPress course pages with all of the tag permissions for you
- Add “locked” and “unlocked” graphics, and a forwarding link to a sales page for when a member doesn’t have access to a course or program
- Generate the WordPress menu you can use to guide people through your courses and membership site

5 Choose a Tool That Does The Setup For You

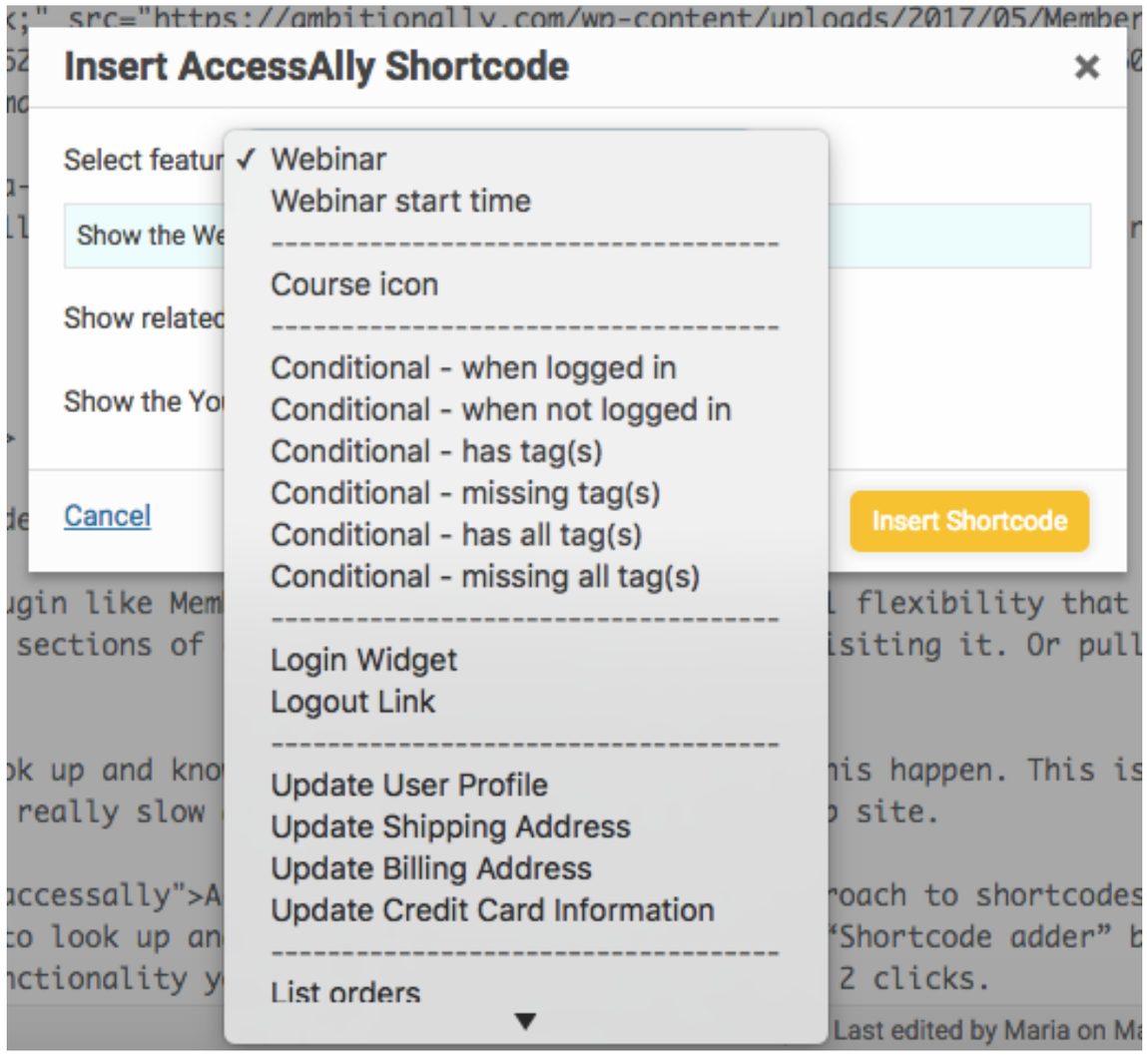


No Shortcodes to Remember

One of the benefits of using a WordPress plugin is the powerful flexibility that comes built-in. For example, you can display or hide sections of content on a page based on who is visiting it. You can also show personalized data from a CRM custom field.

Now with most plugins, **shortcodes** are fairly complex. They require you to review the documentation each time you want to use them. This is a significant barrier for non-coders and it can really slow down the development of a membership site.

AccessAlly takes a different approach to shortcodes. Instead of having a long list that you need to look up and understand how to use each one, we have a “Shortcode adder” button that easily lets you configure the functionality you want to add to a page, with just 2 clicks.



5 Choose a Tool That Does The Setup For You

Don’t get bogged down by shortcodes, just decide what you want to happen on a page, click the AccessAlly button, and make it happen.

Bottom line: AccessAlly does all of the set up work for you, so you only need to add in your course content... and hit publish.

“If you cannot do great things, do small things in a great way.
-Napoleon Hill

Membership Solution Criteria # 6

Get The Support and Training To Succeed



It's hard to know whether or not a tool will give you everything you need to get going once you hit the buy button.

However, it's imperative to go with an option that includes support for you as you explore the software. Support comes in a variety of forms: real humans who answer your questions, videos to guide you along, and/or an interface that intuitively walks you through the setup process.

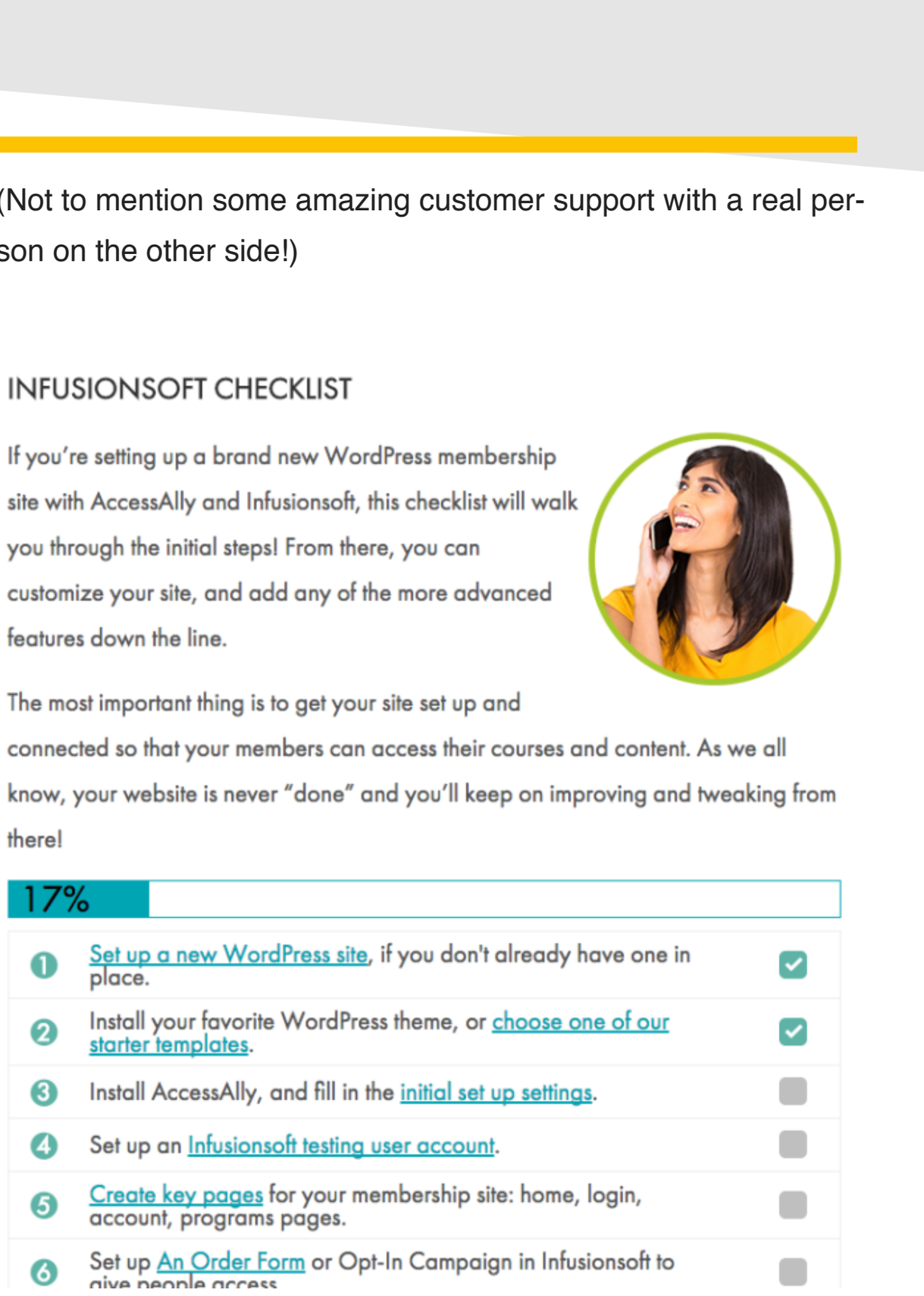
One of the things we pride ourselves on is our ability to make things easy, and to help you discover the best way to accomplish your goals.

In short:

We want to make your ideas a reality.

The best ways we've found to do that in membership site software are to have an amazing onboarding wizard, step-by-step checklists, and videos to get you going.

(Not to mention some amazing customer support with a real person on the other side!)



INFUSIONSOFT CHECKLIST

If you're setting up a brand new WordPress membership site with AccessAlly and Infusionsoft, this checklist will walk you through the initial steps! From there, you can customize your site, and add any of the more advanced features down the line.

The most important thing is to get your site set up and connected so that your members can access their courses and content. As we all know, your website is never "done" and you'll keep on improving and tweaking from there!

17%

1. Set up a new WordPress site, if you don't already have one in place. ☑
2. Install your favorite WordPress theme, or choose one of our starter templates. ☑
3. Install AccessAlly, and fill in the initial set up settings. ☐
4. Set up an Infusionsoft testing user account. ☐
5. Create key pages for your membership site: home, login, account, programs pages. ☐
6. Set up An Order Form or Opt-In Campaign in Infusionsoft to give people access ☐

6 Get the Support and Training to Succeed

It’s hard for us to fully explain how we’re different here, because every company can say they have tutorials or that they love taking care of their customers with top notch support...

But our customers are the ones who confirm that we’re doing a good job, so we’ll let them do the talking:





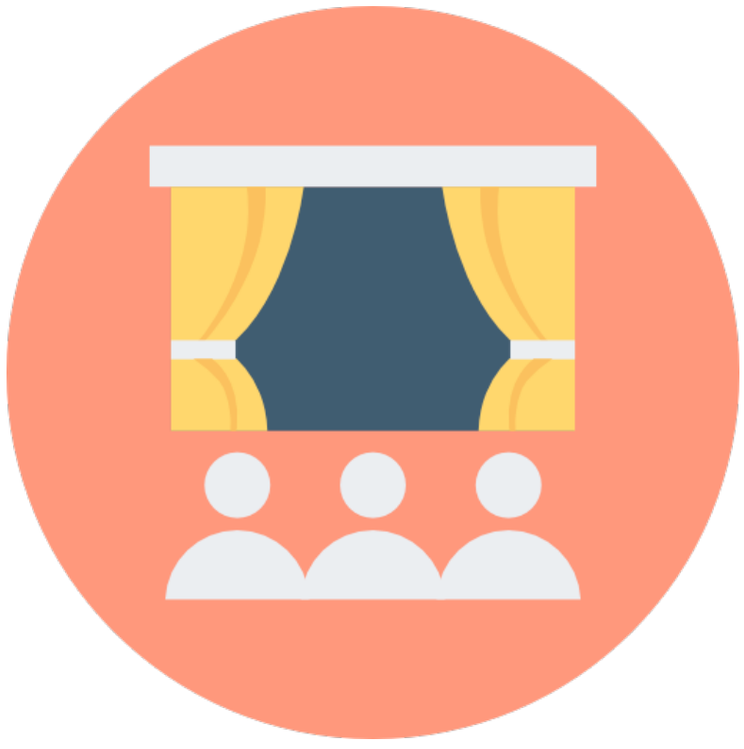


We care about your success, which is why we've got real, live human beings who are AccessAlly savvy pros ready to help you get started with your membership site.

Bottom line: We really care about your success. We've pulled out all the stops with checklists, videos, and a community group to help you build the best membership site possible.

Membership Solution Criteria # 7

Choose a Tool That Delivers an Engaging Learning Experience To Keep Students Coming Back



Some membership solutions offer only bare-bones content protection...

...leaving you to figure out how to engage your students and keep them coming back for more.

This is usually where you need to pull in a bunch of different tools to create a user experience that stands out from other membership sites.

But with AccessAlly Pro, you've got a full-fledged LMS built-in to:

- Track students' progress through your lessons
- Offer quizzes to test learning, tag based on answers, and qualify students
- Auto-generate PDF certificates of completion and reward students
- Track your students' video views, logins, and footprints across your site
- Receive student homework and submit private critiques and feedback

You can also build "Credit Systems" where you can have people earning and redeeming points for courses, bonus content, 1-on-1 coaching, or anything else you can think of.

A member's point balance is stored in your CRM's "Custom Fields," which makes it easy to see the status when viewing their profile. A point balance inside your membership site is like a bank account balance that gets incremented and debited as a member takes certain actions.

Bottom line: AccessAlly offers extremely powerful learning management and gamification features, without needing a ton of coding or cobbling different solutions together.

Membership Solution Criteria # 8

Choose a Tool That's Community Focused



Many of us start our membership sites with our content and courses in mind first, but quickly realize that members stay for the community.

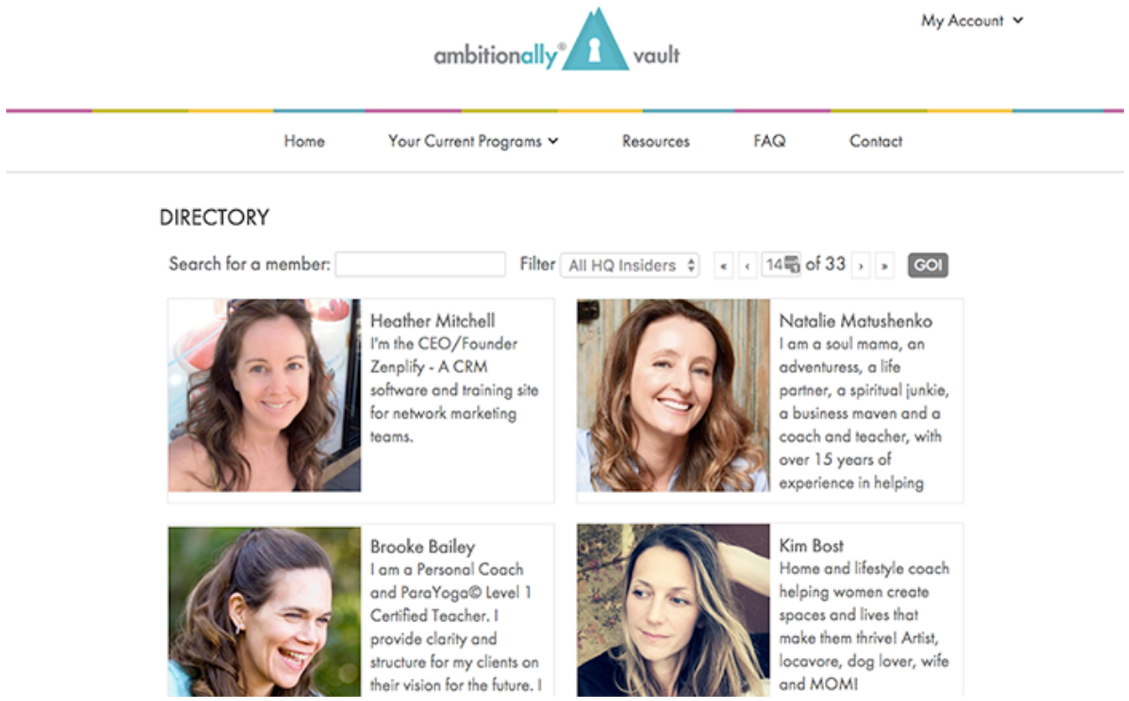
When it comes to membership site solutions, there are dedicated tools to add community functionality (like BuddyPress or member directory plugins).

But here again you might run into the duct-tape issue, finding that these tools don't integrate with your CRM.

That's where AccessAlly's member directories and built-in social sharing features really shine.

You can build fully searchable member directories, sorting and filtering the results by tags.

You can also change the whole look and feel, allowing members to edit their profiles, update their photos, and any additional details.



Beyond that, with AccessAlly your members can share their milestones with a 1-click social share button... where *you* get to decide which page gets shared.

This increases engagement, leads to more opt-ins, and allows you to build a real community in your members area.

(With other standard social buttons, trying to share a course page with protected content will only get you redirected to the members-only login page.)

Bottom line: Have a fully-functional member directory that's searchable and filters by group or course (or any tag!)... and foster real community inside your members area.

"Don't judge each day by the harvest you reap but by the seeds that you plant.

-Robert Louis Stevenson

Membership Solution Criteria # 9

Choose High Coding Standards & Actively Developed Software



I've seen way too many software companies close up shop or lose interest in a product...

Which is why the worst thing you can do when you're choosing a membership site option is to go with a product that's not actively being used by the developers.

Oftentimes, software that's built just because there's a "need in the marketplace" (aka money to be made) isn't going to stick around for the long haul.

That's one thing that sets AccessAlly apart. We actively use the tool ourselves to run our training courses and memberships. But that's not all...

No hidden code

If you're more tech savvy, you may have noticed that some plugins are coded differently...

One thing that some commercial plugin developers do is squirrel away their code behind a “protection screen”. So if their company goes bankrupt or decides to stop offering updates… You can’t use the source code and keep it going.

On the other hand, with AccessAlly, our code is offered under the GPL open source license. You need to be a customer with a valid license to use the plugin, but you can see the code and extend the functionality (or, if anything were to happen to us as a company, you wouldn’t be locked out of the code).

This is a huge point that most people overlook.

We’re proud of our code and we believe that developers should be able to see what they get when they sign up with AccessAlly.

Constant improvements

You want to go with a tool that is actively being developed, where new features and improvements are shipped on a regular basis.

It's easy (for developers) to ship a bug fix version, but to continue to push the envelope and add more of what users are looking for takes dedication and insight into the direction of the marketplace.

AccessAlly releases new improvements on a bi-monthly basis, and our clients thank us for it!

(We've also been told that we're one of the few tools that don't introduce new bugs all the time - and we credit our computer science and software engineering backgrounds for that!)

Co-created by users

The final thing to look for is a development team that has a vision... but that also understands that users should be co-creating the tool.

That means a company will constantly survey, ask for feedback, and build the features and functionality that a user community most requests.

AccessAlly works closely with our AccessAlly Certified Partners and long time clients to continually make our membership site tools easier to use, and more beneficial all around.

Bottom line: You want to choose a development company that is in it for the long haul, that won't lock you out of the code, and that is constantly co-creating new features with users.

9 PLACEHOLDER

Membership Solution Criteria # 10

Prioritize Design and Great User Experience



Look for something that's both easy to use and design friendly.

If you're going to be spending any amount of time setting up your membership site, you want it to be as straightforward as possible... but you also want it to look the way you envisioned.

That means being able to brand your membership site experience with colors, fonts, and images, building a great user experience for your members.

You'll also want to make sure that whatever tool you choose is mobile friendly, since more and more people are accessing their courses via cellphones and tablets.



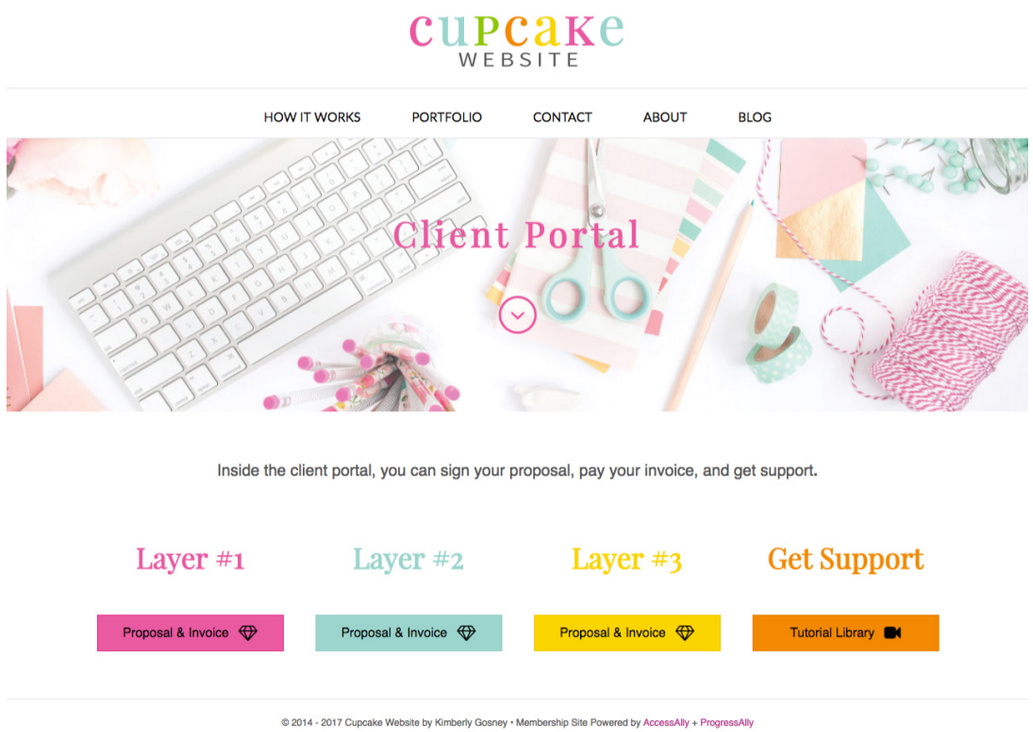
But beyond the colors of your membership site... you'll want the ability to decide how people navigate through your site and consume your courses and content.

With WordPress, you want to make sure that any plugins you choose will work with the theme or template of your choice. Not only does AccessAlly fit with any theme, but it also comes with some bonus templates that you can customize.

If you're looking at all-in-one solutions that aren't WordPress based, you may not be able to change the look and feel beyond the basics... so you're missing out on controlling the flow of the site, where you put your checklists, how your buttons look, and the navigation.

Speaking of these facets of your membership site, here are some recommendations to help you map out your site design:

Decide on your site hierarchy and main pages



Place your 3 types of navigation

There are generally 3 sections on a site that can help members navigate better:

1. The "main site" navigation, which links to core pages like the Dashboard, the Member Directory, the FAQ, the Contact page, etc. These are pages that your user should be able to access from anywhere on the site.

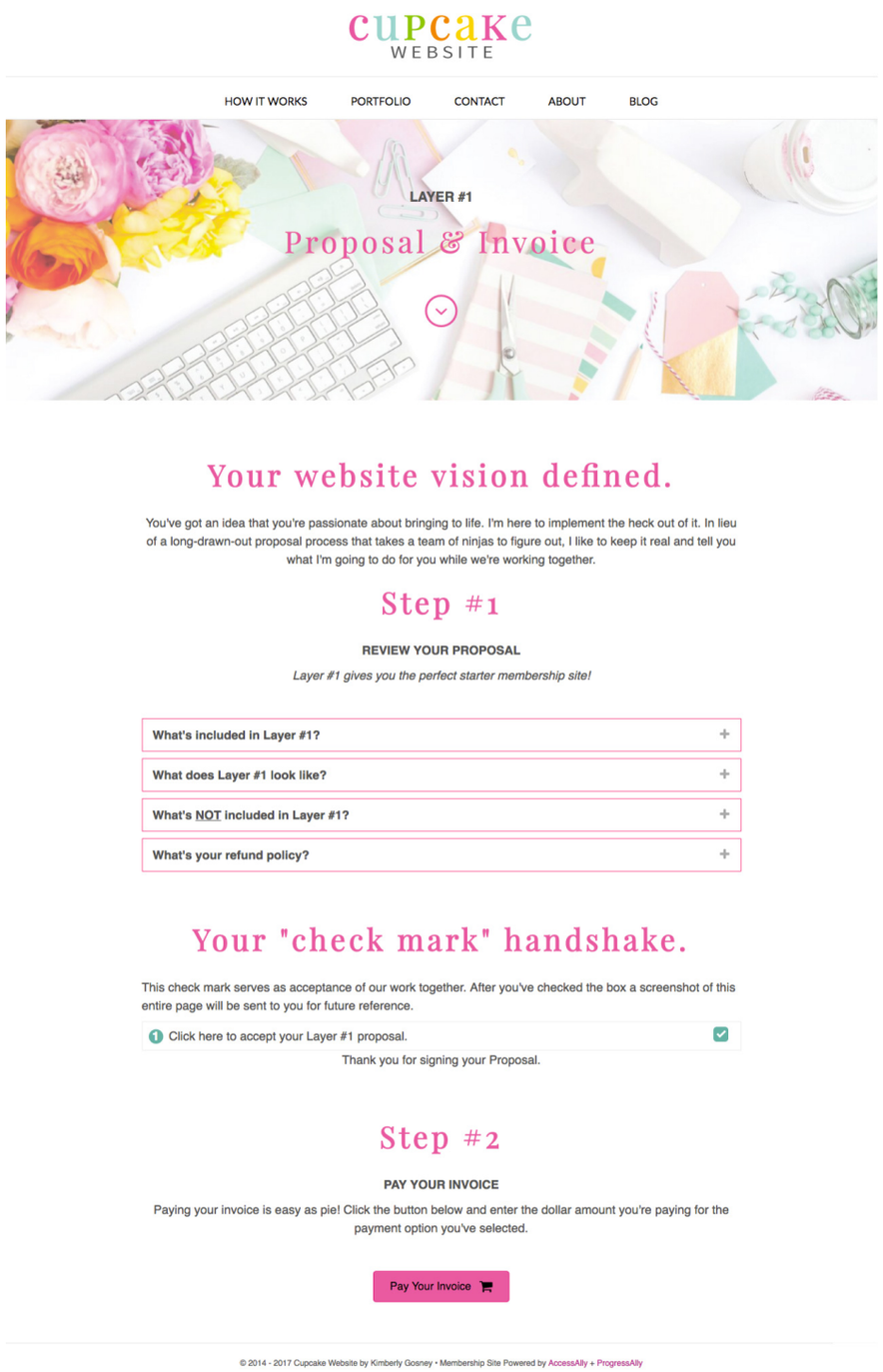
2. The "user" navigation, which links to pages related to the person: the Profile, Update Credit Cards, Billing, and Manage Membership pages.

3. Finally, the "course specific" navigation, which lives inside each course. These menus would link to the modules of a course, or the lessons and sub-pages.

Add your content to the course pages

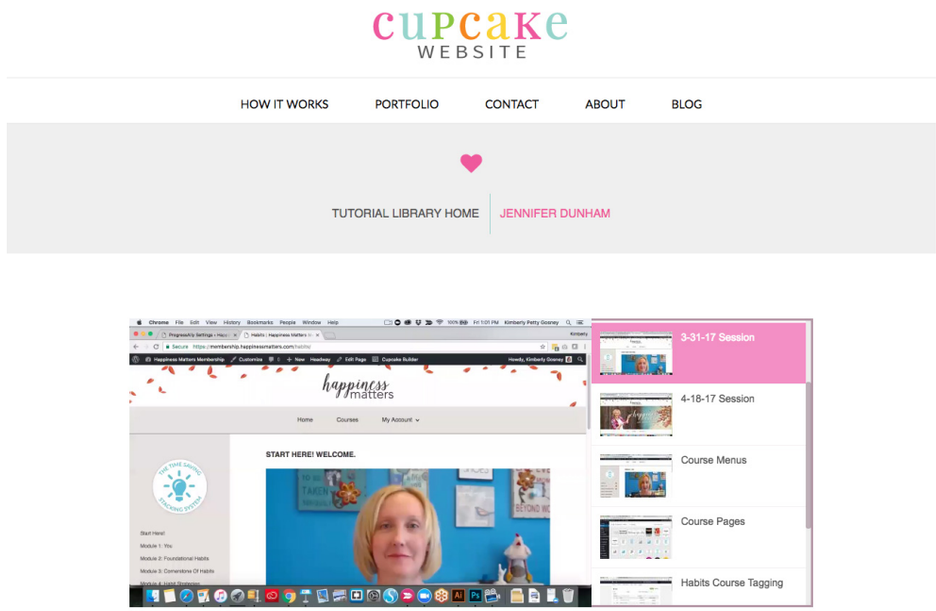
Your content can be video, audio, text, and a combination of downloads, too. You might also add additional engagement and learning options like "Private Notes", progress checklists or

video bookmarks, and quizzes.



Your logo and main branding elements

After figuring out the key site and content hierarchy for your site, it's time to place your logo and main branding elements like your colors, and any other images you'd like to incorporate into your design.



Bottom line: You'll want to choose an option that's brandable, that works on mobile, and that will grow with you as your continue to learn about your members and improve their user experience.

"Design can solve society's biggest problems...

-David Sherwin, User Experience at lynda.com

Membership Tool Criteria

Software Solution:	AccessAlly	CRM-Specific: Memberium, ActiveMember, PilotPress	LMS: LearnDash, WPCourseware, LifterLMS	General: ZippyCourses, MemberPress, MemberMouse	Hosted: Teachable, Thinkific, Kajabi, Ruzuku
Does it match your tech ability & flexible enough to grow with you?	✓	✗	✗	✗	✗
Does it deeply integrate with your tag-based CRM?	✓	✓	✗	✗	✗
Does it do everything you need without add-ons and other plugins?	✓	✗	✗	✗	✗
Is it built to market and sell?	✓	✗	✗	✗	✓
Does it handle course & membership setup for you automatically?	✓	✗	✓	✗	✓
Can it deliver an engaging learning experience? (LMS)	✓	✗	✓	✗	✓
Does it include support and training?	✓	✓	✓	✓	✓
Is it community focused?	✓	✗	✗	✗	✗
Is it built with open source & high coding standards?	✓	✗	✓	✓	✗
Does it prioritize flexible branding/ design & great user experience?	✓	✗	✗	✗	✗

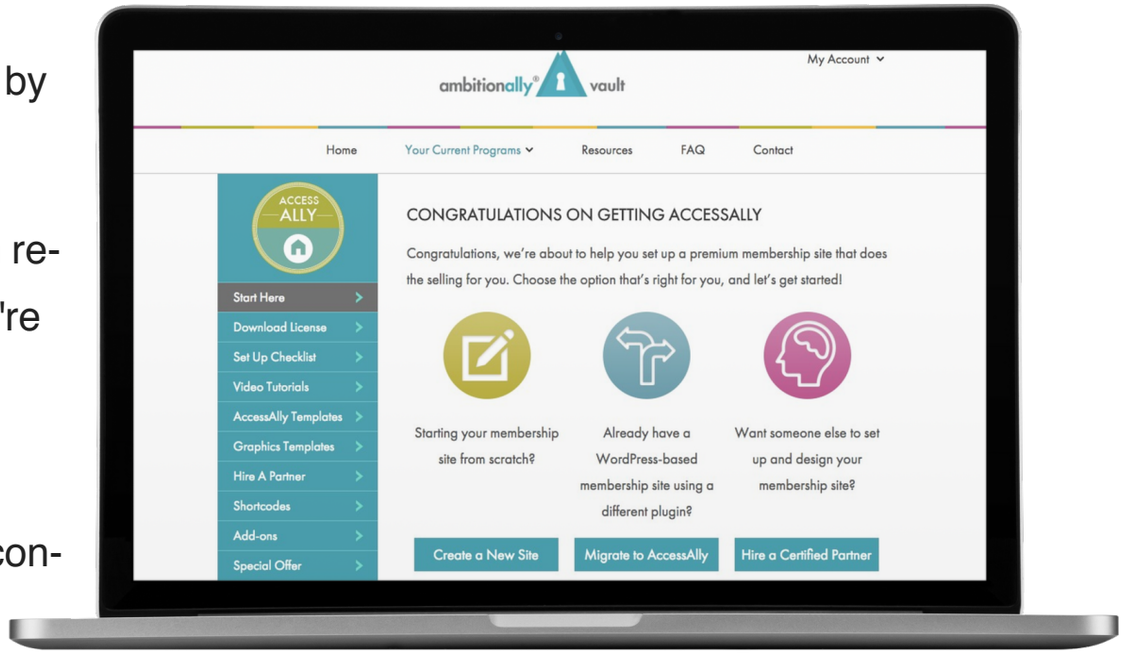
Finally... It's Time To Get Started With Your Membership Site

Finally... It's Time To Get Started With Your Membership Site

At this point, you know what the most important considerations are when building a membership site that sells, and I've shown you what's possible by taking a peek into the capabilities of AccessAlly.

I truly believe that you're capable of building a thriving business based on re-curring revenue and online courses. With the right tools and strategy, you're well on your way!

Remember: **you don't need to have all of your content in place to launch**... just get the first batch of excited members joining and you can con-tinue to learn, iterate, and improve your offerings.



Invest in a powerful tech tool - and make sure it's the right fit

I've talked a lot about AccessAlly - with good reason. It's an extremely powerful tool that can transform your membership site into a true learning experience that your users won't want to leave.

I always want to try out my tech stuff before I buy - and I'm sure you do, too. That's why I created a very unique video that gives you a visual of the whole process. Sometimes seeing is believing, after all!

Experience it for yourself here: AccessAlly Demo Video.

In the end, you'll find that a good tech tool is worth its weight in gold when paired with a winning strategy.

A rising tide lifts all boats...

I intentionally made this Guide free so that you can walk into the world of membership sites and feel confident, knowing *what you want* and *how to make it happen*... but don't keep it all to yourself!

Take the time to share this Guide with at least three other people who are searching for ways to bring a strong source of recurring revenue to their own business, as well.

We can grow and succeed together.

I'm so excited for you!

Nathalie

Founder of AccessAlly

