The Online Marketing Made Easy Podcast with Amy Porterfield
Session #62

Show notes at: http://www.amyporterfield.com/62

Amy Porterfield: Hey there, Amy here. Welcome to another episode of The Online Marketing Made Easy Podcast. Thanks, so much, for tuning in. As you likely know, if you follow my podcast episodes, I tend to teach what I know best. If I have a new strategy in my business or I try out a new project or process or system that's what I tend to teach on these episodes.

I try to make each episode a mini training. Sometimes I go a little overboard and I probably overwhelm you a bit so I'm trying not to do that. But other times, hopefully you walk away from my podcast episodes and think it was awesome and that you can implement what you heard into your business. That is what I'm shooting for so hopefully that's happening more often than not.

Recently, in my business, we hired a brand new, full-time project manager. I had a project manager work on The Profit Lab launches in 2014. But it was just for Profit Lab launches. I wanted to bring someone on full time to work on Profit Lab launches and then all of my other products that I might not be launching (that word scares me sometimes and I don't like to use it too much because when you launch that's kind of a big deal) but some smaller promos that I have inside my business that I would like someone to work on with me as well.

What I have done, like I said, I have hired a full-time project manager. Her name is Chloe. Trivinia, my assistant, has really acted as a project manager for a lot of big programs that we've been working on over the last year. I invited Trivinia and Chloe to come to my house for two days and we literally spent hours (you should have seen us at the end, we literally just go crazy) mapping out the project plan for both Profit Lab and a brand new program I have coming out all about how to create webinars.

I don't have an official name for it yet so that is why I kind of stumble over it. But basically, the program will teach you how to create a webinar, how to use a webinar in your current sales funnel, all the good stuff that I love to teach around webinars. That's coming out later this year.

We went over both projects independently and mapped out the project plans. The one for The Profit Lab was a lot easier than the new program because I've done The Profit Lab for a while now. As a side note, in a few weeks you are going to hear a podcast episode I recorded all about reviewing my last Profit Lab launch. I'm really glad I'm doing this episode today because I am going to walk you through a project plan and it will really come to life when I walk you through the actual launch of The Profit Lab; what worked, what didn't work, how we did it all. It's going to make a lot more sense in a few weeks when we bring it all together for you.

In this episode what I wanted to do is walk you through a project plan. I got off track for a second there but what I was saying is: The Profit Lab project plan is pretty much in place already but we needed to walk through step by step as it relates to the launch in the fall. Every time you do a launch things changes.

Chloe was also brand new so she literally needed to understand every single line item. And that's what we did. We cleaned it up and made it the best it's ever been in terms of every single thing that goes into The Profit Lab launch. We then did the same for the webinar course. That is a project plan I want to review with you today.

After we put this all together I thought this information would be so valuable for somebody that has maybe never launched before. Or, maybe you have launched but you knew some pieces were missing. Or maybe you feel completely unorganized with your promos. This will be so valuable for you to know every step I take inside of a promo. So I decided to share it with you.

It is going to be a little bit weird because I am literally going into my project management system (I will talk about that in a moment) and will walk you through line by line. I promise to go pretty quickly because some of it will just make sense like creating a sales page, hiring a programmer to code the sales page. You likely already know about that kind of stuff. But there is some stuff inside each of the project plan categories that are unique to how I do things. That is where I think you will get the most value, just to see how someone else puts their promos together. That is my goal for you in this episode.

But first, I want to set up some expectations so you understand the project plan as it relates to the program we are creating so that you can put the two together. The webinar course I am creating and launching later this year will be a video-based online training program. Just like all of my other training programs, you will hear my voice and will see the slide deck as the video plays. There will be cheat sheets and transcripts and slide decks and all of the good stuff that is in all of my programs.

It is a traditional online training program like I have done in the past. However, this time it will be focused on creating webinars that convert in your business. Like I said, it's coming out later this year and I am going to promote it live but it will become an evergreen program. So, as I put it together I need to keep thinking that if it needs to be evergreen how can we make sure as we create it and promote it live it can easily transition into evergreen next year. That was always in the back of my mind as we created the project plan.

Another thing that is good for you to know as I walk through each of the tasks inside the project plan is that we are still working on some of the details. It is coming out later this year. We have just started to put it together. Some things might change and I might have to move some things around. Just know that as I share this project plan with you that everything is not set in stone but it is pretty close.

We are also not using affiliates so I am not getting into all of the steps for an affiliate launch. I don't do a lot of affiliate marketing so it's not my specialty and, again, we are not using affiliates for the upcoming promo.

The main promo vehicle is a series of live webinars since that's what I do. I am using webinars to promote the webinar program and that makes sense. We are going to do a series of live webinars over two or three days. That's basically how we are going to attract our audience. We are going to email my list as well as run Facebook ads to register for a webinar. On the webinar I will teach how I create webinars and then I am going to sell the webinar program.

This is basically how I do business anyway but I just wanted to put it out there so you kind of understood where this project plan came about and the expectations of the product we were creating. The promo will be approximately two weeks or less in terms of cart open and cart closed. It is a shorter one for me and, again, I am not calling it a launch because for me a launch is usually three to four weeks. It is incredibly stressful, really time consuming with a lot of players. Because I am launching again for The Profit Lab again in October and the webinar course is likely coming out a little bit before that I don't want two launches on top of each other.

The project plan I am going to share with you today is for a smaller promotion, more manageable. It is simpler and I love that. I just want to put that out there. If you have never launched before or if you have launched but you are not seasoned at launching then starting with a smaller promo might be a great deal for you. Hopefully you will find this valuable.

I am going to share a lot of specific details with you today. If you are in a place where you can grab a notebook you will definitely want to take notes. If you are in the gym or the car or on the subway, whatever it might be, don't worry because, as you know, I always create a really cool free PDF giveaway. Since I am going to share with you my exact project list for this upcoming promo I decided to put that in a project management freebie.

Literally everything I go through in this episode today will be in the cheat sheet. You will want to listen to the podcast episode because I am going to explain some things that won't be in the cheat sheet but at least you will have a running list of everything I review. If you want to get your hands on that all you need to do is go to http://www.amyporterfield.com/62download or we have a brand new texting tool. If you've ever tried to text us to get one of my downloads and it hasn't worked, don't worry. We have changed things up and are using Lead Digits. It is from the company Lead Pages. It works like gangbusters. So you can text the word 62download to 33444. It is as simple as that and you will get this project management freebie or cheat sheet instantly.

Before we jump in, as always, this episode is brought to you by Lead Pages. It is the tool I can't live without when it comes to growing my email list by hundreds every single week. If you have been wanting to make list-building a focus in your business but you just don't know where to start or maybe it's just a little bit overwhelming or you may be list building but don't have a system together; I created a free online workshop for you. It's called the Four Steps to Quickly Grow Your List Without Spending All of Your Time on Marketing. Just got to http://www.amyporterfield.com/newleads and get access to it right away. It is extremely valuable. It is action packed and I can't wait for you to check it out.

Are you ready to dive in? This is going to be new for me. It is a little bit different. But now we are going to review my entire project plan for my upcoming webinar course program. Let's do it!

One thing I want you to know about my project plans is we break it up into three categories. You have pre, life, and post. Pre is everything we do before the cart opens. Live is what we do when the cart is open and post is what we do after the cart closes.

As you might be able to guess, 80% if not more, happens in the pre phase. This is where we spend the bulk of our time. For this episode I am going to spend the bulk of my time in the pre phase getting everything ready.

There have been promos and launches that I have done in the past where I have had just a few weeks to pull it together. As my business has grown over the years maybe I have a month or even two months to pull things together. One thing I have really messed up on in the past is just not starting early enough. Now that Chloe is on board we are literally starting both promos, the webinar course (what I am focusing on here today with you) and The Profit Lab course that I am launching in November, are being started in early June.

We are going to make sure we are starting way in advance. Not everybody has the luxury to do that and this is the first time I have done it and I have been in business over five years. Before I get into the specifics I want to tell you not to compare your business with where you are now with my business. We have different lives, different businesses, different circumstances. It is just not fair to do so.

Sure, I have a full-time project manager. I am starting in the summer for a fall launch. That is all great. But it hasn't always looked like that. It depends on my budget. As my revenues have increased I have had a bigger budget to put back into the company. That hasn't always been the case. I have been launching since about 2011 on my own. I have had great launches in the past and I haven't had every step that I am going to outline here for your today. But it would have been really nice if someone had handed over the freebie that I am going to give you today and told me to try to kind of hit most of the points or at least keep most of the tasks in mind and decide if I wanted to do them or not. That would have been kind of amazing. That's why I am so excited to give you this episode today. It is going to help you.

But don't think you have to do every single thing I am going to talk to you about today. And, don't let it overwhelm you so that you think you can't launch unless you start to plan five to six months in advance. That is not true. You do what works best for you. And work with what you have. If you have a small budget, a tight deadline, then do what you think is most important to make the impact you want to make.

I will get off that mindset soapbox but I just wanted to tell you from my heart to yours not to compare yourself to the big long list I am going to share with you. Mine hasn't always looked like this. Hopefully, it will add value nonetheless.

In the pre-project plan there are certain categories. You will not see what I am looking at not in my free PDF giveaway because I organized it different for you but I use Asana. A sauna is my tool of choice for project management but I know a lot of people really love Trello (hopefully I pronounce it right). We actually subscribe to the SCRUM model. I have talked about it in episodes before. I will link to the book in my show notes but SCRUM is basically how you run projects.

We are going to SCRUM each project we run with Chloe. We want to divide our tasks so that they work into the SCRUM model. I won't get into all of that now but it may be an episode down the road. But I just wanted to throw that out there that those are two tools we are using: Asana and then we SCRUM our projects.

The first category in the pre-project plan for this new webinar course is admin. It is as simple as that. Here are some things we do. The very first thing we do, it might surprise you, can you guess what it is? We organize our Dropbox.

If you have every been in any of my courses in 2014 or before, I release a really cool video where I show you how I organize my Dropbox. I am kind of crazy about it. We like to make sure that there is a folder for everything. There are no random files floating here or there. We have a lot of people working inside Dropbox and we want to make sure it is all organized. We organize it by the project and by certain categories within the task. There may be a folder for sales page, live webinars, auto webinars, promo images, sales webinar content. That is how we organize it.

You can choose how you want to do that but we do get some sort of organization before anything is created for the promo.

We also organize Google Drive. We use a lot of Google Drive documents back and forth so. We draft all of our emails in Google Drive first so a few people can look at it an edit it and do their thing. We will then transfer it over the Infusionsoft which is what I use. That would be a way we use Google Drive. Dropbox and Google Drive are big parts of all promos I do.

In the admin phase we also want to confirm and document all promo dates. We want to document when the pre launch starts. We will want to create some actual content before we actually launch. I will tell you what we will do for the webinar program.

In addition to that, when are the webinars going to be? When does the cart actually open? If I am going to have a price increase when does the early bird end and when does the cart close? All of those dates are determined before we even move forward. They are already in our Google calendars. We have a promo calendar. All of those things are in there right away.

We also determine the promotion phases. This is important. I have different phases for each of my promos. Let me break them down for you: Phase I would be pre-promo content. In Phase I we will be putting out great content before we promote anything. During The Profit Lab you might have seen a pre guide that I put out, Product Maximizer. That was part of our pre-promo content. It was something of great value before we asked for anything in return.

For this webinar course, we are going to do a blog post and will drive ads to that blog post. That will be in the pre-promo content phase. We will also create a really cool Slide Share presentation because one of our affiliates did that for our last launch and it had more than 12,000 views. That is really cool. So we are going to do some kind of Slide Share with content related to how to create webinars. That is all Phase I, pre-promo content. In my case it is a really value-added epic blog post that we can run ads to in order to find our audience in advance and a Slide Share presentation. That kind of stuff likely comes out about two weeks before our cart opens.

Phase II is webinar registration. In Phase II we are getting people to sign up for the webinar. I do a series of probably four or five live webinars that are all exactly the same but I give people time and date options.

Phase III is enrollment open. This is the cart open time. During this phase we are usually running heavy ads to retarget people that visit our sales page or retarget people who were on our webinar or visited our opt-in page. We are talking about things like special timing bonuses. We will tell people we have just released a brand new bonus or will talk about the fact that the program is open so come check it out.

During Phase III we are really focusing on the people that have shown interest. They signed up for a webinar or maybe they got one of our free content pieces from reading the blog post or watching the Slide Share early on. We are really focusing on the tribe we have already attracted in Phase I and Phase II.

Phase IV is when our early bird ends. For our webinar program we haven't figured out if we are going to do early-bird pricing and include a price increase. That is something we still need to work out. But, if we do it, that would be Phase IV where early bird is ending. We would start running ads and post on social media that early-bird pricing is ending and in order to get the discount you need to buy now.

Phase V is when the cart will be closing soon. Early-bird pricing has already passed. The product is now in full price mode. We are simply talking about the cart closing soon.

Phase VI is the final phase. The cart closes TODAY! You are only in this phase for one day.

Remember, this is just my promo. There are a million ways to do it and I bet some launch experts would say that is not how they do it and it isn't the best idea. Just know that this is what works for my business. I just want to share with you what I know works. Then you can tweak it so that it works for you.

We do talk in terms of phases so we kind of know where we are at. The phases really come into play when we run Facebook ads and Google ads and we will get to that in a moment.

Now you know our phases. We determine those phases in advance. We are still in the admin category. Again, sometimes I am going to take a little while to explain something. Then there are other things I will just kind of breeze right through because you will already understand what it's all about.

The admin area is where you are making a lot of decisions. We decide on price points and membership levels. For The Profit Lab promo we had self-study and mastery. I don't know if we will do something like that for the webinar course so we need to figure it out in the admin category which we are in right now.

This is also where I like to hire my designer and hire my programmer. There may be a few programmers depending on what I am going to do. But, for the webinar course we are literally starting from scratch. I don't have a sales page. I don't have a registration page for webinars. I have zero emails. I have nothing. So hiring a designer and a programmer and, if you want, a copywriter.

I have just recently started to work with a copywriter. But, for the last five years I never really have. It is just something that I can do now that I have a bigger budget to work with. I am kind of experimenting with that to see how it goes. That is something you might consider as well. Inside the admin category is where I will determine who I want to hire and get information to them so that I can get proposals back in advance.

Finally, all promo campaigns get set up in Infusionsoft. We use Infusionsoft and set up our campaigns so that emails will go out on certain dates and times throughout the entire promo. If we set up the campaign in advance it might just be a shell because we won't have the emails done yet and we don't exactly know when all of those emails will go out and all that good stuff. But at least we start with a shell so we can start thinking about where we need to fill in holes.

That all happens in the admin phase. These are some big decisions. That won't happen overnight. We have been talking about this for months now and we kind of have most of that hashed out.

The next category is program content creation. I do want to say that I am going to break down these categories for you but if you have a few people working on your promo it is not necessarily the exact order you check everything off. I am just giving you the chunks and kind of how we like to focus on each task. But there are 20 tasks people are working on at different times and there is no specific order, per se.

The program content creation section is where I create the actual product. For me this is where I spend the most time. This is where I agonize the most, where I worry the most, where I get to put in all of my creativity. This is what I love the most, actually creating the content for the program.

One of the reasons we hired a project manager was so that I didn't have to do everything else on top of really putting my heart and soul into creating the content. I feel my content will get better as I build up a small team to support these big promos and launches.

For program content creation you will do things like solidify the product name. We actually haven't done that yet. That is something we are still working on. We will get the logo designed if you want a logo for your product. Remember, this is an information product where I am focusing. Some of these things would not apply if you have a physical product or something totally different than what I am creating here.

After we get the product name and maybe get the designer working on the look and feel for the logo, I spend time creating the course outline. This is where I spend a lot of my time. What will the modules look like? What is inside each module? What about the handouts? What bells and whistles do I want to add? Basically, what am I teaching? I outline it all in advance. I decide on what will be the core content and what I will add for bonuses.

Bonuses are important to any promo you do so you should really be thinking of them as you are creating content so that there is some alignment. We do program bonuses. You get maybe two bonuses when you buy the program. But we have also started to do timely bonuses. For The Profit Lab launch we did three bonuses on the sales page and then over a month of promoting The Profit Lab we released three more bonuses but in a timely way.

On a Monday we said that we had a brand new bonus available if you purchase. Anyone that has already purchased gets the extra bonus. If you have already purchased you will be getting things you didn't even know you were going to get. We actually had five or six bonuses but they weren't all laid out on the sales page right away. We released them throughout the promo and that gave us another reason to email and to talk to our audience. That was great.

It gave us another reason to run an ad or to post on our social media site that a brand new bonus was available. It got people more excited about the launch. During the content creation phase I figure out which timing bonuses I want to create.

From there we also do a fast-action bonus. If you are on one of my live webinars we offer a bonus if you buy while you are on the webinar.

I can talk about content creation for 5,000 hours. But I promise to move past this quickly. But, one thing that is important to know is when you are creating your content if you don't take your bonuses into consideration they tend to look like afterthoughts. They tend to look like they don't really go with what you are promoting. I hate to see someone promote a program and their bonus is a product that is totally unrelated that they created three years ago and they are just throwing it into the mix.

That isn't the kind of thing you want to create. In my opinion, a bonus should enhance the program you have already created. For me, I did a bonus, How to Get More Engagement on Facebook. My Profit Lab program was about how to build a social media sales funnel. But I knew a big component would be Facebook. So, adding a little more Facebook material into the program would enhance it – that kind of thing.

Bonuses are a good thing to figure out while you are creating your content.

From there, this is really cool, we create a content grid. What I will do in the show notes is show you a snapshot of what that grid looks like so you can see the different components. We do the grid so that we know what each module video is, basically the title of each module video. Then we check to see if the transcript is done, the slide decks loaded, etc. The grid helps us make sure everything we are doing is finished and in the members area.

First we use it for me to create all of the content. Then we use it as a checklist to make sure every single thing on the grid made it into the members area. It is really cool. I will show you a snapshot of that content grid with you.

In addition, at this phase, I ask for a slide template to be designed. Once I have figured out what I want to teach in the program I use Keynote to actually put my content together. In order to put the content together for the training modules I need a really cool looking slide template so that every single training looks the same.

This is something we used to never do in the past and at the last minute when I was ready to record the content I would think I needed it to look good and would wonder how I was going to do that. Now, early on, I talk to a designer and ask them to create a slide template in Keynote. She will come back with six different slide templates that I can use throughout all of my training. The are all branded the same and look the same.

From there I create the content inside my slide decks. This might be totally different from how you create content. But what I like to do is open a slide deck and see Module 1, Video 1. I put it all together. I type in what I want to teach. I bring in images, examples, all of that. I put it all into the slide deck.

If I were smart I would then have someone format that slide deck. Right now I am spending hours making it look good and that is silly. We all have those things we haven't let go of yet. That is something I haven't yet let go of.

If I am smart, for this next webinar course, I will create the content inside the slide deck (that is what I feel most comfortable with) and I can then hand it off to someone and ask them to make it look really good. I will give them the content and ask them to put it together and make it look good inside the slide deck. That is something I need to think about.

Once I actually create all of the slide decks I record all of the videos. One thing that I have learned is that I am not really good at creating one slide deck, recording it, and then moving on to the next. Sometimes I will think of something five videos down the road after I have recorded five that I should have included in one of the earlier videos. That totally screws me up.

I have learned to first create all of the content. In my case it would mean all of the different slide decks for all of the training videos. Once they are all created I go back and record them. I spend a few days just recording each slide presentation into the video. That's what works for me.

From there I create the handouts, the content that goes into the handouts and cheat sheets and check lists. I will then give it to my team to get designed. But I create the content. We get all of the training videos transcribed and from there I also start thinking about a stick strategy. Remember, we are still in the category of content creation for the program.

The stick strategy is basically something I like to tell people after they have purchased; I surprise them with a bonus and that bonus is usually pretty juicy. I spend a good quality of time on it and it comes out after the refund period. It is a great way to say, "Stay engaged, keep with the program, I've got a really great bonus for you after you get through the first 30 days."

That is how we use a special bonus because it allows people to really focus and engage and know that you are taking care of them. I love to do that. I don't talk about it until after people are inside the program so that it is a special extra surprise.

From there, the next thing is a new category. We talked about program content. There is promo content as well. Remember, I mentioned I want to do a blog post that is focused on webinar content and can run ads to that blog post to kind of find people that are genuinely interested in learning how to create a webinar. I am going to create that blog post in this category here.

When we focus on the promo content creation we are creating a brand new blog post, we are creating that Slide Share I talked about, and I am going to create a podcast episode that is focused on how to create webinars. I am going to use my free content that I already do, I have a blog and I have a podcast, and we now have a Slide Share opportunity so I will create content all around creating webinars so that I can get some free content out there as a value add. That is the promo content creation.

For you that promo content might look way different. But you do want to think about it, in terms of when you are promoting, how to use your free content as part of the mix.

The next category is webinar content creation. Webinar content creation is my sales webinar. As you know, I use webinars to teach. If you have ever been on my webinars you probably already know I spend a good chunk of time just teaching. Once I teach some topic related to the product I am going to sell I sell the program at the end of the webinar.

I need to actually create another template for that sales webinar. I need to outline that sales webinar with what I am going to teach and how I am going to teach it. I create the sales webinar and will create a workbook that goes with the webinar. If you have ever been on one of my webinars you have probably gotten an email that said, "Click here to download a workbook so that you can follow along during the webinar."

I will say in the past I have sometimes made a mistake and created the webinar, created the workbook, and at the last minute I have wanted to change the webinar a bit. Then it is screwed up because the workbook is already out there. I have struggled with that so many times. Just be careful. Make sure that you create the webinar in advance so that when the workbook is going out you feel confident that your webinar creation is done.

Maybe it is the content person in me that just can't let go of it but, make sure it is done.

Moving on, the next area is the members area. This is where people will log in after the buy to get all of your content. I like to design a layout with an idea of what I want it to look like. Maybe I take snapshots of other programs I have been in and like the layout for. I do this to give to the person that is going to create my membership site some ideas.

From there I create an outline of how all of the modules should actually be outlined inside the members area. I will have to tell them there are four modules and in each module there are four videos, there are two bonuses and then, etc. I need to communicate this with the person that is creating my membership site.

We use Wishlist for our membership site. I have a guy that I really love that puts together my membership sites. We work well together. I will get him to working on that even before the content is done. As long as he has an outline he can get to working on it even while I am still working on the content.

For the members area category I also always record a welcome video. I like a welcome video when people log in for the first time. Inside this category we also include all of the program materials. So somebody has to get all of the videos and cheat sheets inside the members area once it is designed.

We also test all videos and cheat sheets to make sure everything is downloading properly and playing properly. That is why you want to get your members area done as soon as possible so you can test all of the bugs. There will be bugs inside of a promo, you will find them here and there so testing is so important.

We are moving on. I get nervous that I am going to go on too long so I am really trying to move it for you.

The next category, we are still in the pre phase, is sales page creation. We usually wire frame a sales page and lay it out as a team how we want it to look. We decide where the buttons will go, where the content will go. We lay it all out and from there we write the sales copy and if we need to collect images for the sales page we do so. We may get some head shots of me or some shots of the members area that we want to include on the sales page.

We try to collect anything we want to put into the sales page. We also include testimonials. I basically figure that is part of writing the sales page copy. And, because we will include testimonials in the sales page copy that will be a part of this as well.

Once we write all of the sales copy, wire frame the sales page, we have our designer go ahead and lay it out and have a programmer code it to make sure it will be mobile responsive and will work well on a desktop as well. We have it all laid out by a designer and then the program comes in and does all of the coding.

Then I have notes in there to make sure to check the terms and conditions at the end of the sales page, the earnings disclaimer, the privacy policy, whatever it might be. You will see when you get the free PDF that I have put all of that in there so you will remember. There are tiny little things to check but if you don't have them documented you will never remember, especially when you are stressed out during a promo.

From there we review the sales page. I have someone else on my team provide a second set of eyes. If I wrote the copy someone else will check all the copy to make sure there are no typos, make sure the links are working on the sales page, I usually do a countdown timer on my sales page, and for The Profit Lab it was off by an hour throughout the entire thing and we didn't even know until the very end. I should have had someone check that so I have included it in here.

Also, do a test sale. Once your sales page it set up (we will talk about order forms for the sales page in a minute) and your order form is set up you want someone to actually do a sale to make sure it is all working. A lot of merchant accounts will allow you to do a test sale. Definitely do that to make sure your credit card goes through and you receive the welcome email that should come through afterwards as well as the receipt. That is something that's really important.

In addition to that, for our sale page creation, we also set up SnapEngage. SnapEngage is the live customer service chat we have on our sales page. If you have ever been on a sales page of mine you might have seen pop-up box appear that says, "Hey, this is Trivinia, can I help you with anything?" That is my team on the other end, actually live, using the tool SnapEngage.

Once you have your sales page set up you also want to focus on order forms. For order forms you want to just make sure you have the pricing right, you have the refund policy on your order forms. We made custom order forms this last time so we put some testimonials on the order forms so that when people were getting ready to buy they could read what other people have said about the program.

We also put SnapEngage on the order form as well. If you get stuck filling out your credit card or if you have a question we have a live chat person right there waiting for any questions whatsoever. Order forms are so very important. And you are going to need to create multiple forms if you have one pay, three pay, and then self-study and mastery. Those are all different order forms. You will need to think about that in advance.

From there we make sure Infusionsoft is set up. You may use A Weber or MailChimp. Whatever you use, you need to make sure you have everything set up inside your email service provider. For us, that means we have to create special tags. We tag you if you sign up for a webinar. We may tag you when you actually attend a webinar or if you don't attend a webinar but you signed up.

These are all places you can tag people. Tagging is an Infusionsoft term so it may be different for your email service provider. But just make sure all tags are set up properly. We tend to have a lot of tags because we do a lot of live webinars. That is just something to think about.

We also actually set up our login. When you sign up for one of my programs, Wishlist and Infusionsoft are actually talking to each other. They are integrated so that you actually get your login details in your welcome email. I like when the login details are right there for you. That's just an integration we had to do between Wishlist and Infusionsoft.

When you are setting up your order form, I forgot one thing, make sure you are setting up the receipt language. Wherever that receipt is coming from when someone buys, make sure the language is exactly what you want it to be on the receipt. You might add the refund policy, whatever you might do, just check all of that because all of these pieces are really important.

From there, it's all about the email creation. We create emails, obviously, throughout all of the promo. You would be surprised how many emails we have to write in advance. We create an email grid, kind of like the content grid I told you about. The grid basically outlines every email we are going to send and when we are going to send it. It is very complicated. I am not actually going to take a snapshot of that because it really won't make sense to your promo verses mine.

Just think in terms of when you are going to send out an email, the subject line of the email so that you can easily find it, and who will receive the email. That is the kind of thing you want to think about when you are doing a promo and sending out emails.

Let me tell you what kind of emails I create in a promo. The first email invites people to my live webinar. We usually do two or three webinar invites over a two-week period.

From there we have to create a confirmation email to let people know they are registered for the webinar. We also create a pre-webinar sequence. This is actually something I am going to talk about in detail in this brand new webinar course I am creating. We send a series of emails before you ever even get on my webinar.

If you have registered for a webinar you will get a series of emails leading up to the webinar. My goal is to encourage you to get on live. We always know if you are on live you are more engaged and more likely to pay attention to the free content and the promo we are doing. All of my pre-webinar emails are going to encourage you to get on live and will tell you what you will get when you show up live.

Once we have the pre-webinar sequence written we also write a replay email. If you miss the webinar or if you were online but want to watch again the very first email you receive after my webinar is complete would be a replay email. We write the replay email and then from there we also do a promo sequence.

We write a series of emails and, let me click on this one because there are some things I include in my promo sequence, I would include emails about the course benefits, course features. I may talk about some testimonials or some stories I have that are related to the new program. I may announce some timely bonuses like we talked about earlier. Or, in the promo sequence I am emailing to let you know when early bird is going to end or when the cart is going to close. Those are the types of emails that would be in the promo sequence.

The last thing we write as it relates to promo emails is a non-registered promo sequence. One thing we were super surprised about is that even though the bulk of my promos for everything I do is usually run by the sales webinars, there is a handful of people that sign up for my courses that never go on one of my webinars.

This last time maybe 20% of the people that signed up for The Profit Lab program had never been on one of my webinars that I created to promote The Profit Lab. But they did receive my non-registered promo sequence. After we are done promoting my live webinars, if you never signed up for one, we are still in the promo phase, we will send a series of emails to you to encourage you to check out The Profit Lab but we don't mention the webinar or the fact that you missed it or anything like that. We just create some emails around the benefits, features, and stories related to The Profit Lab.

This is a whole different sequence and this is something that has proved really valuable. We used to never do that. If you didn't sign up for one of my webinars I never promoted my programs to you after that. This time we changed things up and saw a really great uptake in sales because of that (we saw an increase in sales – I hear myself saying uptake and decided I wasn't making sense).

Next, you want to create emails for your new members. We make sure we have a welcome email. If you have different emails you will need a welcome for self study and a welcome email for mastery if you have two levels like I did for Profit Lab. I don't think we will do two levels for the webinar course but I am not positive. I just put it in the project plan just in case.

Something I have never done before but just started doing with this last launch is to create onboarding emails. An onboarding email would be an email people get after they buy the program. What I like to do is create enough to spread out over 30 days. For the first 30 days of the program when you are most engaged you will hear from me regularly through the onboarding emails. That is something you might want to write. I will talk more about onboarding emails when I do The Profit Lab launch review a few episodes from now.

In addition to that, obviously we want to email my list about the new blog posts we are going to write related to creating webinar courses and we will email my list about that Slide Share we are going to create. Those are two more emails we need to create. I document everything in my project plans and that would be the next category.

We are moving on and are getting close to the end. Customer support is the next category. There is a whole category for customer support. Here we determine the refund policy and the language around it. We will put automatic responses together.

During a promo there are probably 20 questions we get asked all the time. Because we have been doing this a while we are very aware of those questions. I write out responses in advance so that my customer support team already has those drafted and it is exactly how I want to respond. They can do a copy and past and kind of tweak it a little and send it out.

We do a lot of automatic responses. In addition, we do some for SnapEngage as well. There are a lot of questions that come up when people are live on my sales page. I write some responses for that as well so that my customer support team and do a copy and paste quickly if need be.

Related to customer support, I also have a 1-800 number that you might have seen in my last promo where you can actually call us an ask questions about the program before you buy. If you called us you likely go a voice mail first and then Trivinia would spend an hour a day going through all of those calls and calling you back.

I needed to record a voice mail. My voice mail basically thanks you for calling and lets you know Trivinia will call you back if you leave your name and number. But before I jump off I answer questions that often come up. I actually do a little FAQ in the voice mail so that if I can answer the question you might not need to leave a message. It is just one more way to support your audience.

During the customer support category we will also determine military and hardship discounts. A lot of military will ask if there is a discount or people will tell us they have a hardship. We need to talk about whether we are going to offer that or no. You might not want to offer it but it is something you will want to talk about in advance.

We put together a support schedule so that we know when people will be working and who will be manning the customer service emails and who will be on the sales page answering questions. We just put a schedule together there.

In addition to that we set up a special drop box for promo testimonials. This is something new too but is something you really want to think about. When you are doing a promo you will get a lot of great testimonials. If you do webinars people will tell you they loved your webinar and give you their favorite part. They will give details or they might have just purchased your program and make post how excited they are and that they have already gotten results.

This is happening during the promo so I always have someone in customer service looking out for those and taking screen grabs because you never know when you might want to use them. They put them in a special Dropbox folder. That was something that over the years I was never doing and I always saw great testimonials right out of the gate. I knew I would love to grab those.

In addition to that we are going to actually make sure we have SnapEngage set up (I already talked to you about SnapEngage). Ring Central is the company we use for the 1-800 number so that people could actually call us and leave a message during the promotion.

We also have something called a knowledge base. That is just a Google Doc. Inside the Google Doc we list the links to all of the live webinars (in case you have multiple registration pages). All of the links to sales pages, order forms, anything we have out there that we could link to during the launch are put into one document so that the links can be easily found. This is something we set up in advance.

We have a backdoor sales link. Sometimes after I close the cart there have been problems where someone couldn’t order. We have a secret link that if we need to give it out we have it set up in advance so that it is ready and you don’t have to look for it at the end of the launch. We always have that in case there are problems with people getting in as planned.

We have a few more categories. There are a lot and that is why I was a little bit scared to do this episode. But I thought it would be so interesting for you to see all of the pieces that are involved. I am crossing my fingers that you are finding it valuable.

This next category is my live webinars. For my live webinars we determine the dates of the live webinars in advance. We use GoToWebinar and we set that up in advance. We write the copy for the webinar registration page. We get the webinar registration page programmed. You could use Lead Pages and it will already be programmed for you.

We also determine who will record the webinar. I have one girl that always records my webinars. I know GoToWebinar will record the webinars as well but I like to have a backup because I play a replay. We always get someone in advance to record our webinars. We also make sure the workbook for the webinar is uploaded to the S3. We use S3 so that there is a link to the workbook.

During the webinar if someone tells us they never got the workbook we have a link we can give them right there. In addition, and this is something I will teach in the webinar course, I like to have a few questions already written out in advance. When you do a live Q&A if you are brand new at webinars you likely won't have a lot of people on so you won't have a lot of people asking questions.

You know there are a few questions they really should ask to get full value in terms of what you just taught and what you are selling. I like to write a few quality questions and responses in advance. If I am not getting some good questions on the webinar I will have my assistant ask those questions. They are just kind of backups to have you covered and to make sure you are giving information that your audience needs.

Lastly, determine the live webinar replay process. When are you going to send out the replay email with the link to the replay. I use Lead Pages for the replay. They have a video page and I put the embed code of my video (the replay) on a Lead Page and I send all of my traffic there. But you want to figure this out in advance: how you are going to do it, where you are going to send traffic for the replay. Again, Lead Pages is the best option there.

From there, this is really cool and I think you will love this in the PDF (remember, http://www.amyporterfield.com/62download will give you the free PDF); for the first time I have listed every single graphic that I use during a launch. In the past, literally up until the last launch we did we would be frantically trying to get images created at the last minute. We would have one designer doing one thing and another person on 99Designs doing another. It was all scattered and nothing looked uniform. My branding was terrible.

This last launch, Profit Lab, was the best branding I had ever had. We had one graphic designer work on everything. We got her in advance so that she was on our team and during the launch she knew what we needed because we had a whole long list for her. In addition to that I am now just going to use this list every time I do a launch.

I am not going to go through every image but we are talking about images for emails, social media, inside your webinar (if you do a webinar), images for your website to promote your new product, images inside the membership site, Facebook ad images. All of that stuff is important. I have literally listed every single image I could possibly imaging you would need during a promo so that you could literally give that list to a graphic designer and they can go to town. It is a pretty cool list so I will put that in the PDF for sure.

The next category is Facebook ads. Again, we set up a grid. I am kind of addicted to Google Docs because Google Docs has an Excel grid. We create an ad grid where we include the image, the copy, the headline, the link, all of that good stuff for all the ads we want to run.

Like I said, when I do Profit Lab launch in review episode in a few weeks I will show you every single ad we used during that launch so you can get a good sense of what we did. You will see all of the phases I talked about earlier and you will see those phases in my ads.

You want to determine all of your ad copy and ad images in advance. You will want to decide when you will run ads and whether you will run ads for each phase I talked about early on in the show. Phases and when you are going to run ads really start to come together here so it is something to think about in advance.

The same thing goes for Google ads. We just started using Google ads. We would create the banner ads for Google ads in advance as well.

I only have three more categories. The next category is social media. We like to create a posting schedule and decide throughout the entire promo what we are going to post. We have never done this before so it is brand new to us because we have always had a little bit of a scattered issue going on during social media. It is kind of funny, I teach social media in my products but my social media is totally lacking during a promo because my focus is everywhere else.

This time we are going to put together a posting schedule in advance and will load it all up into Edgar. Edgar is my tool of choice in terms of scheduling for Facebook and Twitter. We will then put some system together to get things up on Instagram as well. But we are going to do this in advance.

I also have a note to talk to my support team to make sure they are paying attention to my social media sites during live webinars, especially. That is when people tend to say they can't get on or that a link isn't working. They are posting on my Facebook Page but my whole team is focused on the live webinar and is not even looking. This time I am going to make sure we have someone actually checking to be sure that everyone is okay on social media.

From there I have a category that says Mastery. Again, I don't know if I am doing mastery for this webinar course but I added it for you so you can get it in the PDF. If you have two levels, usually the mastery level or the VIP level (or whatever you want to call it) has special things you have to do. If I were going to do a mastery level I would have to set up a Facebook group and create a Facebook banner for that Facebook group.

Whatever bells and whistles I promised I would have to set up live Q&A calls for them. Whatever it might be I want to list all of that in advance so that I remember what I need to do for that special VIP group in advance.

We are trying to do almost everything ahead of time so in the pre phase we actually get our wait list page set up. During The Profit Lab launch you might have noticed at midnight we said the cart was closing. At 12:03 a.m. all of the links directed to the wait list page. That is something that you really have to plan in advance. I like to have my team set up the wait list page now so that we have it ready the minute we close the cart so that we can stick with our integrity and actually close the cart when we say we are going to close.

The final category in the pre phase is to create some kind of tracking document. What do you want to track? Is it daily sales or units sold? Just set it up in advance and determine who will actually update that. Maybe you are a small and mighty team and it is you that will be updating it. That is no problem but it is nice to know during a promo where you are.

If you are a lot lower and not getting toward your goal you might want to change things up. Or, if you are doing really well you get to celebrate the whole time through. I have been on both sides so I get it. But it is nice to know where you are throughout the entire launch. You should know what your numbers look like every single day and a tracking document will help you do just that.

We have officially made it through the pre phase of your promo. That was a lot but that is 80 to 85% of the work. Now the next two phases, live and post, are really short. I am not going to go through these line by line. I will include them in your free PDF. But let me quickly review them.

When you are in the live phase you will determine when you are at start and when you are at stop. You are obviously doing that as the carts open (this is something very live that you have to take care of in advance). You also want to make sure you are keeping an eye out in your new members area.

As you start to sell and people start to go into your members area make sure everything is working for them. Keep an eye out for any questions. Make sure people are really supported. Really drill down there to make sure everything is going smoothly as planned.

In addition, if you do a price increase while your cart is open you need to make sure you switch out order forms. I have included that in the live phase of the PDF. You will then have to change your sales page if you do a price increase. We did a price increase for The Profit Lab. When the price increased we had to do a price increase on the sales page and we changed the countdown timer. It was counting down until the price increase and we had to change it to a countdown to cart close.

These are just little things you want to remember. In addition, we have created (this is in your image pack that I will give you) an image of a new Facebook cover photo for webinar registration and a new Facebook cover photo for early bird and a new Facebook cover photo for when the cart was closing. During the promo when it is live I put in the PDF that someone needs to change those out according to whichever phase you are in.

When you have this in your project plan and you have a due date people will know that it is the day to remember to change out the image because you are moving into the next phase. That is why I use Asana. You can assign the task to somebody and put a due date on it.

In addition, you are tracking. During the live promo you will track and keep your Google Doc updated. I say to update in the morning and at night (that would be a live task). During a live webinar, if you are going to do multiple webinars like I did, you would need to change out the webinar registration page to a new date and time once you fill out the new webinar or the date has passed. That is something you would have to do live.

That isn't much though. So much of what you have already done is already taken care of in the pre phase and this will eliminate a lot of the stress you feel during a launch.

Finally, we are into the post phase. The post phase is super easy. You will make sure all of your ads are shut down. You will make sure that every single page during the promo is pointing to the wait list. You will also make sure that you have changed all of your social media. Your cover photo for Facebook, Instagram, Twitter should no longer be promoting the launch. You will want to make sure all of those go back to normal. That is something I forgot a couple of launches ago. It was up for a month and I don't know how that even happened but I didn't have it in my project plan and that is why I have included it here for you.

I also have a category that says, "Celebrate." We do a virtual champagne toast. During the celebration phase I also have a note to send out thank you cards and thank you gifts. This is usually used if I am working with affiliates. I usually send out thank you cards and thank you gifts. If someone went above and beyond or jumped in when we needed them and we didn't think we would those need a thank you.

Anything kind of thank you that needs to be sent would happen in the post phase and that is something you need to remember. Again, all of the redirects are probably the most important thing. Everything should get redirected.

There you have it. That's everything: Pre, live, and post. I think it will all start to come together when you hear me break it down in a real launch that already happened. The Profit Lab launch review episode will do that for you and I can't wait to do that.

Hopefully this was valuable enough that you really see what goes into a promo. I have to say it, you guys know I can't step away from it. Please know that you do not need to do everything on these lists. Just use them as a guide. Choose the things that are most important to you and what is practical and what is most appropriate for you based on where you are in your business right now.

Then, aspire to kind of add to it as your budget grows and your team grows and all that good stuff. Please, just be nice to yourself. I think I am so sensitive about it because I used to do it all the time. I still do it sometimes where I compare my business to other people. That is just totally not fair. We never know what someone else's situation is. So, no comparing. Just focus on your business and how you can make it exactly how you want it to be so that you can impact the lives of your customers.

That was a lot of information I just covered. I know that for a fact. I also think it was really valuable to walk you through each stage and also what's included in each of the stages: pre, live, and post.

What is really cool is you are going to see this come alive even more so in just a few weeks when I do an entire review of my Profit Lab launch that I just did last month. I am actually going to put it into practice and show you how this all worked inside of a real launch much bigger than this webinar course I am creating so that you can see it in action.

I think you will really find that valuable as well. I am going to share what worked, what I changed, what didn't work, and where we saw the biggest bang for our buck. The freebie for that Profit Launch episode that is coming out will include every single ad we used in the launch. It is really, really good and I am excited to share that with you.

That will be in just a few weeks. Look for that soon.

Speaking of freebies, as you know, there is a freebie for this episode. If you didn't get it yet I want you to go to http://www.amyporterfield.com/62download. You can get the project plan freebie so that you know every step I am going to take for my webinar course. And really, we have used these same steps for years now to put together our other courses we have put together in the past so we know it works really well. You can also text 62download to 33444 to get the freebie instantly.

Thank you so much for being here with me today. I cannot wait to connect with you again next week.

Next week we have a very special guest. We have podcasting expert, John Lee Dumas, on the show. Together John and I created another mini training episode like this one. We are going to help you decide if adding a podcast to your existing business model is actually a good idea or not.

If you already have a blog or are already selling a product or program and kind of have things going, should you add a podcast to the mix? We will talk about that. If you think it is a good idea for your business we are going to talk about how to get it going as well. It is going to be a great episode. We spent a lot of time and effort making it come together. I can't wait for you to hear the interview.

I will see you again next week. Thanks for much for being here. Bye for now.

Show notes at: http://www.amyporterfield.com/62