



VP MILESTONE CHECKLIST

Use this checklist to help start your online brand up. It will show you the milestones and timelines to hit for each phase of your online business build-out.

MONTH 1

• Milestone: Define Your Vision

Phase 1 of our **Visionary Planner® System** 4 Phase system is **VISION**.

Before you start doing any busy work, you'll need to get clear on what it is you're about to build. Here you implement 'blue sky' planning so you can **dream big**.

This lets you do a number of key things:

- Decide if an online business is the **right investment** of time, money and energy for you or not.
- Map out the **lifestyle** you want your business to give you.
- Get clear on your **online business plan** to sell your information and services.
- If you don't yet have a **legal business entity** and **bank** set up, you'll do that here.

✓	ACTION STEP	EST TIME
<input type="checkbox"/>	Complete the Clear Vision Planner™ so you're clear on the Vision for your online business and lifestyle.	1 WEEK
<input type="checkbox"/>	Complete the Online Business Blueprint™ so you can plan out the big picture of what your online business will look like. This helps you stay focused as you move through the rest of the Visionary Planner®.	1 WEEK
<input type="checkbox"/>	Setup your Business Entity . If you have not yet created a business entity (LLC, corporation, etc), a bank account, TAX ID number and gotten an account with Kajabi, now is the time to do so.	2 WEEKS

MONTHS 2 - 3

Milestone: Define Your Audience

Your business needs to attract leads and close clients (we call them 'Guests') so you can get cashflow and grow your business.

In **Phase 2 (RESEARCH & ATTRACT)** of the **Visionary Planner® System** you'll dial in your Audience and research how other Brands are attracting and converting them. This will save you years of trial and error and tens of thousands of dollars.

This lets you do a number of key things:

- Define and locate your Ideal Audience members (including the **'Now to Wow' transformation** you'll coach them to achieve.)
- Craft an authentic **Audience and Visionary Story** so you attract your Audience.
- Develop your **Teaching Map™** which informs you of the content you'll teach about and your **Treasure Map™** which lets you know what offers to create.
- Develop your **Visual Branding** so your Brand visually attracts your Audience.
- **Create content** and a **Free Treat™** (Lead Magnet) so you can start sharing your message.
- **Grow your list** by creating a simple **List Grow Path™** (funnel), a 1st pass of your **website & blog**, a **FB Messenger** funnel and **ads**.

✓	ACTION STEP	EST TIME
<input type="checkbox"/>	Complete the Audience Attraction Planner™ so you can verify that you'll be able to attract an Audience online via starting up a community, networking with influencers and running ads.	2-3 WEEKS
<input type="checkbox"/>	Complete the Brand Clarity Planner™ so you can create a simple Brand Name, Logo, Colors and Fonts so your Brand looks like a million bucks and builds trust.	2-3 WEEKS
<input type="checkbox"/>	Complete the List Grow Fast-Track™ to build and launch your List Grow Path™ so you can grow your list and keep them warm until you launch your Focus Group Offer™ .	4 WEEKS

MONTHS 3-6

Milestone: Launch Focus Group Offer™

PHASE 3 of the **Visionary Planner® System** is **PRODUCE**. This is where you build out all your offers. To get cash flowing in and to get you paid in advance to create your offers, you'll launch a **Focus Group Offer™**.

This revolves around your **Teaching Map™** which outlines the big picture 'step-by-step' process that you'll guide your Audience through as they move closer towards solving the big problems they're facing.

Your Focus Group Offer™ can sell monthly in the **\$20-\$200** range for Group Coaching, or a one time payment of **\$2,000-\$10,000** for 1-on-1 coaching.

This lets you do a number of key things:

- Create a simple **'High-Ticket Path™'** that lets people get on a **sales call** with you or your Sales Team.
- Create an **Assessment** that filters out unqualified leads so you don't waste valuable time on unnecessary Sales Calls.
- On the call, you can sell people into a **high ticket '1-on-1' Coaching Package** which sells in the \$2000-\$10,000 range. This lets you get cash flowing into your business.

✓	ACTION STEP	EST TIME
<input type="checkbox"/>	Complete the Focus Group Fast-Track™ so you can plan out and launch your Focus Group Offer™.	8 WEEKS
<input type="checkbox"/>	Build and launch your High Ticket Path™ and Focus Group Offer™ (including your High-Ticket Path™)	4 WEEKS
<input type="checkbox"/>	Build relationships with prospects and run ads so you can fill your High-Ticket Path™ with qualified leads.	ONGOING
<input type="checkbox"/>	Fulfill your Focus Group Offer™ so your Guests can pay you to develop your Ascension Suite of offers.	ONGOING

MONTHS 6-9

Milestone: Automate Your Sales Process

Here you want to automate how you sell your **Focus Group Offer™**. This includes launching a webinar live, then converting it into an 'evergreen', or 'on demand' marketing funnel.

You'll **revise your Website** now that you've got more feedback on your marketing message, develop a 'signature talk' so you can start booking speaking gigs and build a simple **Sales Automation Path™** so you can have attendees of your speaking events text into get on your marketing list.

Finally, you'll map out an **outline for your book** and then start producing **weekly 'Episodes'** that will stack together to create your book. This lets you leverage your content publishing to give you a book that further establishes your authority and grows your list.

This lets you do a number of key things:

- Automate your sales process with a **Sales Automation Path™** to free up your time (NOTE: You'll still need to hold Sales Calls, but all Call attendees will be crystal clear on how you'll help them achieve their goals which will save you time on the calls.)
- Craft a **Visionary Talk™** that lets you be distinct in the marketplace, grow your authority and grow your list (which leads to more sales).
- Capture leads with the **Visionary Talk Path™** so attendees of your live Visionary Talk™ can text in to get on your email marketing list.
- Leverage your content creation so you can create a book that further establishes your authority and grows your list.

✓	ACTION STEP	EST TIME
<input type="checkbox"/>	Complete the Sales Automation Fast-Track™ and launch your Sales Automation Path™ . This will help you educate your Audience about your Focus Group Offer and streamline the time it takes you to do sales.	4 Weeks
<input type="checkbox"/>	Develop a Visionary Talk™ and Visionary Talk Path™ so you can build your authority and grow your list when you do live speaking events.	1 MONTH

MONTHS 9-12

Milestone: Launch Treasures #1 and #3

Treasure #1 is your **Gateway Offer™**. It is usually in the **\$7-\$300** price range. You will already have taught this inside your Focus Group Offer™, so creating a 'final' version should be easy. You'll create marketing that includes a **Live Monthly Challenge** which gives a reason for you to create regular events that keep your list engaged.

Here you'll also create your Treasure #3 (**Signature Offer™**). This will be your Focus Group Offer™ without any coaching from you. This sells in the **\$500-\$2000** range. You'll simply create a 'final' version of this offer, as well as **marketing** (mini-course or webinar) that educates and entertains your Audience on why they should enroll in your Treasure #3.

This lets you do a number of key things:

- Launch a **Gateway Offer™** that lets you make have an irresistible offer in the lower price range that solves the #1 most urgent problem your Audience has (which entices them to buy!).
- Map out a **Live Monthly Challenge** that gives you an 'event' to re-engage your list each month (and convert them into sales).
- Launch a **Signature Offer™** that repurposes your Focus Group Offer™ by removing the 1-on-1 calls you'd normally do. This gives you a lower price point so you don't miss out on the people who couldn't afford your higher priced 1-on-1 offer.

✓	ACTION STEP	EST TIME
<input type="checkbox"/>	Complete the Treasure #1 Fast-Track so you can build out your T1 and it's marketing funnel and ads.	4 WEEKS
<input type="checkbox"/>	Complete the Treasure #3 Fast-Track so you can build out your T3 and it's marketing funnel (including a launch sequence or webinar) and ads.	8 WEEKS

MONTHS 12-14

Milestone: Launch Treasure #2

Treasure #2 is your **Continuity/Membership offer**. The Treasure #2 sells in the **\$20- \$200 a month** price range, or a '50% off for the whole year' price of **\$300-\$500**.

This will be a 'reboot' of your Episodes. Because you will have been publishing content for several months, you'll have created a library of assets. These get repackaged into an automated **'Training Vault'** that will require less of your time. You'll be able to have monthly **group training calls** to create a higher value for your offer (and charge more).

Here you'll also create **marketing systems** for your Treasure #2.

This lets you do a number of key things:

- **Launch** your continuity offer to your now large list.
- Repurpose your content to **create a robust library** of training tools.
- Have a product you can **upsell buyers** of your Treasure #1 and #3 into.
- Repurpose your content to create dozens of Free Treats which help you **drive more leads** into your marketing systems.
- Have all your content organized so you can hire an editor and **launch a book**.

✓	ACTION STEP	EST TIME
<input type="checkbox"/>	Complete the Treasure #2 Fast-Track so you can build out your T1 and it's marketing funnel and ads.	8 WEEKS
<input type="checkbox"/>	Build Email Sequences and Retarget Ad Campaigns that automatically sell your Ascension Suite.	1 WEEK
<input type="checkbox"/>	Build new Free Treat Sign Up pages to scale your list building efforts.	2 WEEKS

ONGOING

SCALE & AUTOMATE

PHASE 4 of the **Visionary Planner® System** is **SCALE & AUTOMATE**.

After you've build a 1st pass of your entire Ascension Suite and marketing, it's time to look at Guest Feedback and analytics and scale! Here you'll optimize your marketing, update offers and 'automate' your businesses operational systems so you're removed from the daily operations (you'll have the funds to hire a team to handle this for you).

This frees your time up to focus on only the 'CEO' tasks that you should perform:

- Check your financial numbers to make sure **sales volume** is being hit.
- Check that **Customer Service** is running smoothly and your Guests are happy.
- **Revise marketing messaging** so it's exactly what your Audience is looking for.
- Continue to create fresh **content and engage** with your Audience.
- Run **launches and promotions** so you're always giving your Audience an event to get excited about.
- Launch **Masterminds and Retreats** so you can create a stronger sense of community and upsell into your Treasure #4 (high-ticket offers).

NEED HELP? If you're 100% committed to building a successful online business that gets you the impact, income and freedom you're after, then be sure to see if the **Visionary Planner®** is the right fit for you! Click the button below to jump on **complimentary 'Start Up Your Brand' Clarity Call** with us:

SCHEDULE YOUR CALL NOW

If the button doesn't work, simply go here: <https://visplanr.com/FreeCallNow>

Any questions? Email us at HelpMe@TheVisionaryPlanner.com

KEEP YOUR EYES ON THE PRIZE!