

ONBOARDING ROADMAP

A person with brown hair is shown from the chest up, wearing a white shirt and a yellow wristband. They have their hands pressed against their eyes, covering them completely. A yellow rectangular box with a black border is superimposed over their eyes, containing the text 'MR. CARTNETICS'. The background is a vibrant yellow with a halftone dot pattern and several circular icons: a red and white target, an orange network diagram, a blue and white swirl, a blue and white play button, and a blue and red gear. There are also small white cloud-like shapes with motion lines.

MR. CARTNETICS

A vertical barcode with the number '123 456 789 012' printed to its left.

123 456 789 012

AND!

ACTIONABLE CHECKLIST

Congratulations on your investment into the Cartnetics software where you will be able to get all of your marketing deliverables done under one roof.

This roadmap is created especially for you to showcase the strategy and the full potential of the software so that you can see how you can begin regardless of which market, industry, or niche you are in.

PILLAR 1: INCREASE YOUR LEADS

- Create a Twilio Account
- Create a Mailgun Account & Add Your SMTP Email Configuration
- Add a Phone Number
- Connect Social Media Platforms
- Embed Your Chat Widget To Your Website

PILLAR 2: INCREASE SALES CONVERSIONS

- Set Up Your Domain
- Migrate Your Funnels
- Claim Your Funnel Templates

PILLAR 3: INCREASE YOUR AVERAGE TRACTION SIZE

- Set Up Email Campaigns
- Automate Your Workflows & Triggers

PILLAR 4: INCREASE YOUR PURCHASING FREQUENCY

- Create Pipelines For Your Leads
- Schedule Discovery Calls/Appointments With Your Clients
- Track Your Reports Under ONE ROOF
- Set Up A Sequence To Garner Testimonials Or Encourage Your Audience To Leave Reviews

THE PAST

It used to be the case that marketers would utilize a ton of softwares... just to get one deliverable done. For example, after getting a lead's email and number, you would have to utilize Mailchimp or Infusionsoft Keap to follow up with them via an email blast.

As someone who is heavily involved in the online marketing world, it can be hard (*and not to mention costly*) to:

- Hire a tech team
- Go through a ton of back and forth with different software to collect leads
- Pay for multiple subscriptions

So, how can you start keeping track of everything under one roof in the most efficient way?

THE SOLUTION

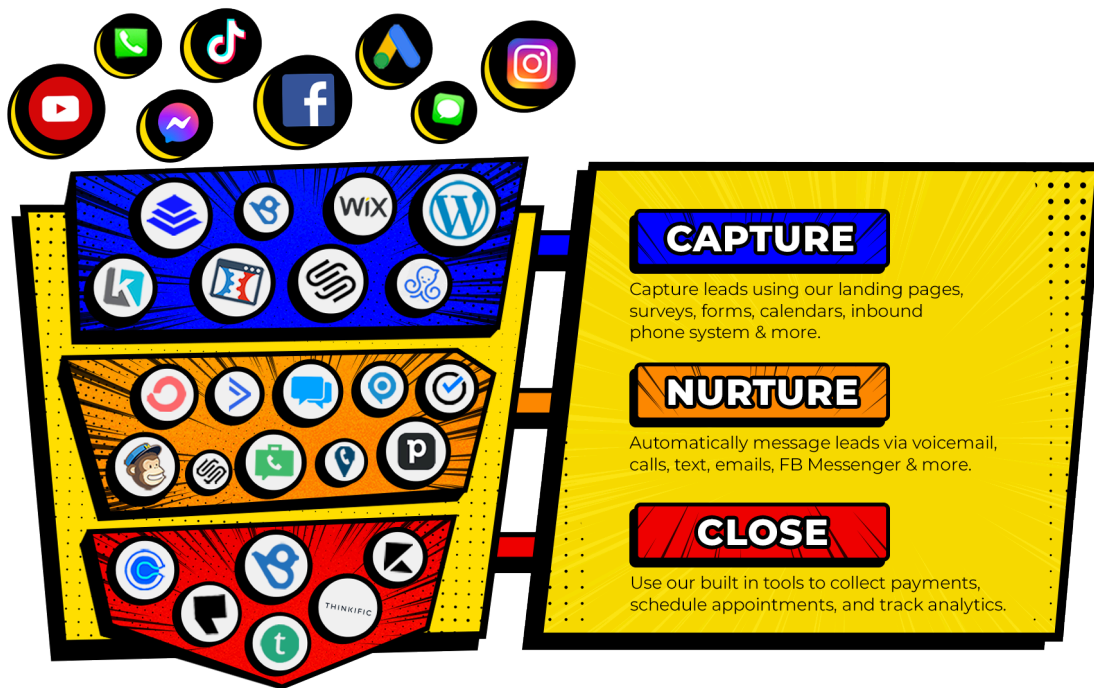
Cartnetics will be able to do everything these different individual softwares specialize in (*all within ONE software*) so that it saves you thousands of dollars and will put everything in one place to save your time and sanity.

On top of that, you will also be able to start customizing your own campaigns such as funnels to swipe, email templates, and follow-up processes from my own in-house templates which are also included in one place within this software.

The Cartnetics software will help you:

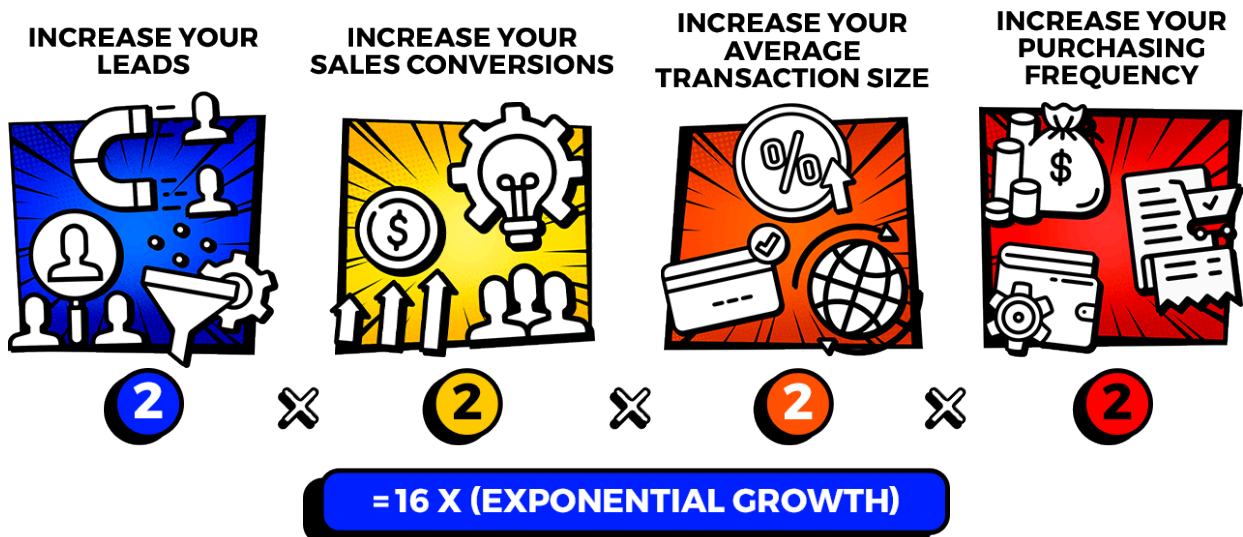
- Get more leads
- Convert these leads to sales
- Nurture these leads
- Automate your marketing a whole lot better
- Save your time and sanity
- Avoid the feeling of being overwhelmed

THE BIG PICTURE



As a software that was designed to help you scale through one platform, Cartnetics will streamline all of your marketing deliverables under one roof so you don't have to "duct-tape" multiple platforms together.

This is how we make it happen:



PILLAR 1: INCREASE YOUR LEADS

Top Of The Funnel (TOFU)

Top-of-the-funnel marketing refers to **the first stage of the buyer's journey**. It is the part of the process where marketers will spread brand awareness about their products and services to generate leads that will hopefully, eventually, become customers. This is when your audiences will just be encountering you and discovering that you hold the solutions to their problems.

For the longest time, in order to acquire a lead, convert them into a sale and eventually nurture them into a higher ticket, you would have to do these different tiers in marketing such as collect leads from ads, chat with a prospect, run YouTube ads or get them on a phone call.

The first thing most businesses would have in place is a landing page in order to capture this query from social media. If they are a little bit more advanced, they would have a sales process called a funnel e.g: lead funnel, webinar funnel, etc which had to be built with a page builder (ClickFunnels, Wix.com, etc.)

This is where Cartnetics differs. With one single software, you can get a bird's eye view of all your vital funnel stats which would help convert a lead into a buyer by maximizing the features of this software:

Functionality Within The Dashboard



- (20) Lead - \$ 141,994.00
- (16) Scheduled Strategy Session - \$ 129,994.00 (80.00%)
- (14) No Show/Cancelled Strategy Session - \$ 112,994.00 (70.00%)
- (11) Showed Strategy Session - \$ 112,994.00 (55.00%)
- (8) Showed Strategy Session - Buyers - \$ 83,994.00 (40.00%)
- (7) Showed Strategy Session - Follow Up - \$ 82,997.00 (35.00%)
- (6) Won - \$ 57,997.00 (30.00%)

What the illustration looks like will be dependable on your funnel type.

How to utilize the top of the funnel option:

- One of the things we could not have done without this software was to give the audience the assets that have been used to clone the top funnels

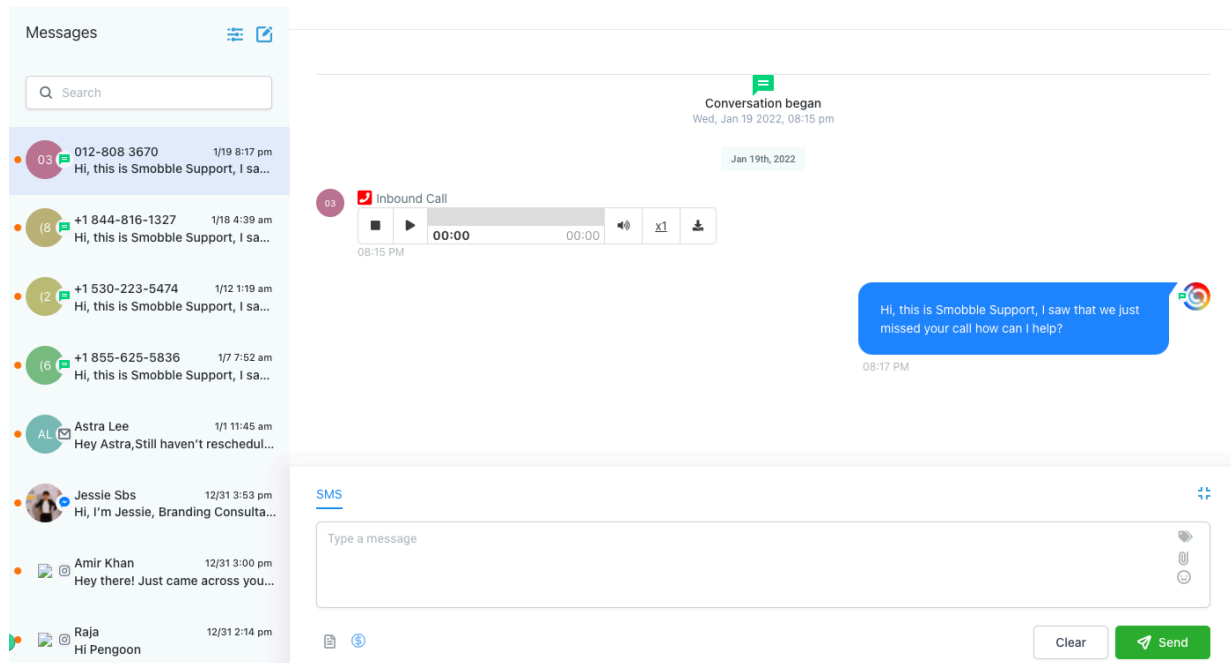
Funnels				+ New Funnel		
Legacy Mentoring Copy	Version 2	22 days ago	7 Steps	Live	Copy	Edit
Lead Funnel	Version 2	22 days ago	1 Step	Live	Copy	Edit
Business Builder Workshop	Version 2	22 days ago	6 Steps	Live	Copy	Edit
Legacy Mentoring	Version 2	22 days ago	7 Steps	Live	Copy	Edit
Cartnetics Software	Version 2	22 days ago	4 Steps	Live	Copy	Edit
Lead Magnet Funnel		22 days ago	2 Steps	Live	Copy	Edit
Cartnetics (Live Funnel)		22 days ago	8 Steps	Live	Copy	Edit
Table Rush Secrets	Version 2	22 days ago	7 Steps	Live	Copy	Edit
Videos Challenge	Version 2	22 days ago	9 Steps	Live	Copy	Edit

- How you would build these funnels is the same way you build any of your other funnels
- Think about your funnel steps



1. Get a bird's eye view of your business

If you are running a local business, there are certain numbers that you want to target, hit and track all in one place. Go ahead and familiarize yourself with this page.



2. Keep track of all of the conversations you have with your prospects with this tab

Not only will Cartnetics allow you to keep track of text messages and emails all in one area, but this software will also pull all the conversations you've ever had on Facebook, Instagram, etc.

TIP

The software also captures the lead's name, email, and number and will enable you to follow up with them utilizing the same platform that they initially reached out to you with. E.g: if someone messages you on Facebook Messenger, you can reply via the chat tab, and they will receive the response through the messenger application.

How can you do this?

x

BROWSE HELP LIBRARY CONTACT US

Search our Help Library

Q

How can we help?

- > General Articles
- > Workflows
- > Contacts
- > Conversations
- > Calendar
- > Opportunities
- > Funnel Builder
- > Forms
- > Webhooks
- > Email & SMTP
- > Phone

Go to the Help Library to get the exact steps on how to implement your integration step-by-step, move-by-move.

PILLAR 2: INCREASE SALES CONVERSION

Middle Of The Funnel (MOFU)

Mid-funnel or middle-of-the-funnel marketing is **a bridge between the initial contact with your brand (top of the funnel) and the final purchase (bottom-funnel)**. It involves reaching out to mid-funnel leads that already exist in your database and getting them to engage with you so that you can start to increase your sales conversion.

What this means is that, after you acquire this lead, that is when you want to nurture the lead into a buyer.

E.g: An example of a middle of the funnel step would be to nurture a lead through a follow-up email sequence.

Some examples of an email sequence:

- Opt-in
- Cart abandonment
- Seinfeld
- Promotional

PILLAR 3: INCREASE YOUR AVERAGE TRACTION SIZE

Before, marketers would have to utilize softwares such as AWeber, Keap, and sometimes CRM softwares (customer relationship management) like Hubspot just to follow up with a lead. But now, you don't have to go through the numerous layers of a ton of software to increase audience traction size.

Here is how you can start to nurture the leads you collected from the top of your funnel in Cartnetics to fulfill your middle-of-the-funnel goals:

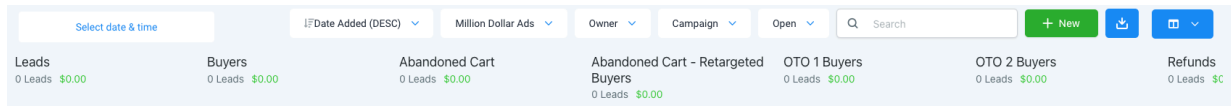
Functionality Within The Dashboard

1. Continue nurturing the lead by utilizing the opportunities tab

Once you have obtained a lead, you can put them through an automation and reminder sequence to get your audience to schedule a strategy session.

The screenshot displays the Cartnetics dashboard interface. At the top, there's a navigation bar with filters for 'Date Added (DESC)', 'Campaign' (set to '[VEC] Legacy Mentoring Strategy Call'), 'Owner', and 'Open'. A search bar and buttons for '+ New', 'Download', and 'More' are also present. Below the navigation, the dashboard is divided into several columns representing different lead statuses: 'Lead' (27 Leads, \$0.00), 'Scheduled Call' (11 Leads, \$0.00), 'No Reply (Uncontactable)' (0 Leads, \$0.00), 'Call Completed: Closed Sale' (0 Leads, \$0.00), 'Call Completed: Sale Rejected' (1 Leads, \$0.00), and 'Call Completed: To Follow Up' (0 Leads, \$0.00). Each column contains a list of lead cards with names like Maryjane Chibuike, Sean Kheng, Ibukun Taiwo, Queeneth Nwaeze, Rafique Ahmed khan, Adeola Fayemi, Johan Cundana, and Manoj Gupta. Each card includes a profile picture, name, and a '+ Task' button.

What is powerful about this, is that you can keep track of your leads and follow up with them if they do not show up for the scheduled time.



Leads	Buyers	Abandoned Cart	Abandoned Cart - Retargeted Buyers	OTO 1 Buyers	OTO 2 Buyers	Refunds
0 Leads \$0.00	0 Leads \$0.00	0 Leads \$0.00	0 Leads \$0.00	0 Leads \$0.00	0 Leads \$0.00	0 Leads \$0.00

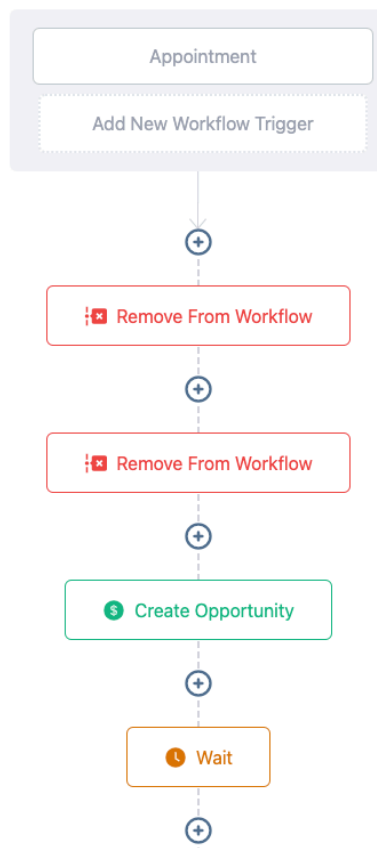
Just like the original sales call funnel, this also gives you the option of following up and maximizing every single lead that comes through your door.

One of the pillars to scale your business is the frequency and how you can increase the recurrence of a customer coming back to you. In that sense, none of your leads will fall through the cracks regardless of whether you are an offline or online business.

On top of that, you will be able to organically incorporate reviews without manually reaching out to people.

So, what exactly happens when someone gets moved from one opportunity tab to the other?

2. The follow-up process will kick start in the workflow area



Your prospects will receive messages and emails depending on the update of their status.

PILLAR 4: INCREASE YOUR PURCHASING FREQUENCY

Bottom Of The Funnel (BOFU)

The bottom of the funnel is where you want leads to be since you've spent a fair amount of effort to get them there. This is when leads are making the final decision to buy from you or a competitor and where you will be able to turn them into loyal customers to increase your purchasing frequency.

At this point, your goal is to ascend your buyers to the next product or offer and close them on the deal. Initially, marketers would utilize software such as Calendly to keep track of the leads they are trying to close. But, what would happen is that in order to build this technological stack, it would cost businesses a minimum of \$1500 a month.

With Cartnetics, you can utilize the calendar function to start keeping track of your leads to ascend them to the next level. But, that's not all! Check out how Cartnetics can help you out with your bottom-of-the-funnel efforts:

Functionality Within The Dashboard

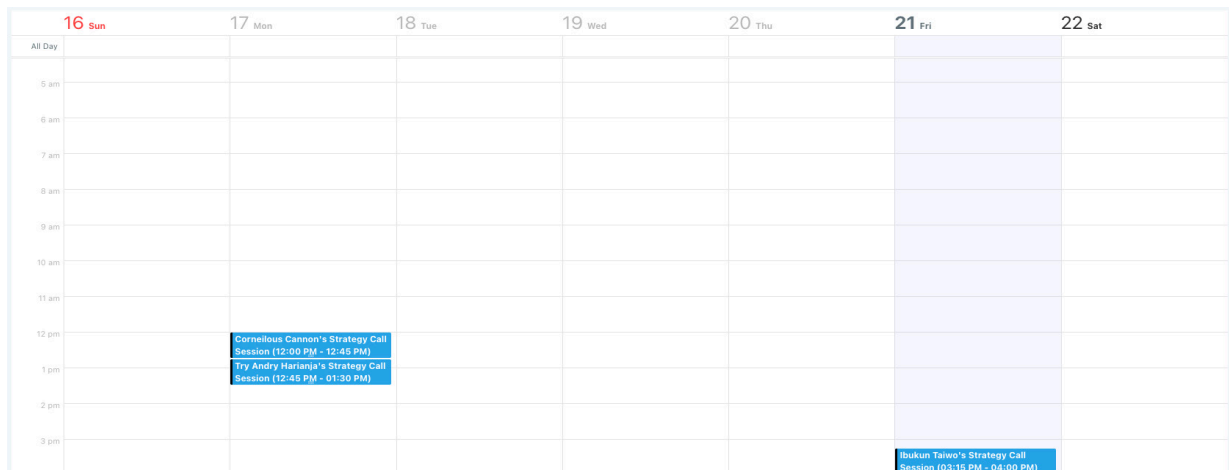
1. Get good reviews

Now that you already have a buyer, you can set up a sequence to garner testimonials from here. This will make the experience more personal and make sure that you are communicating with them on many different channels.

2. Keep track of what the reviews look like

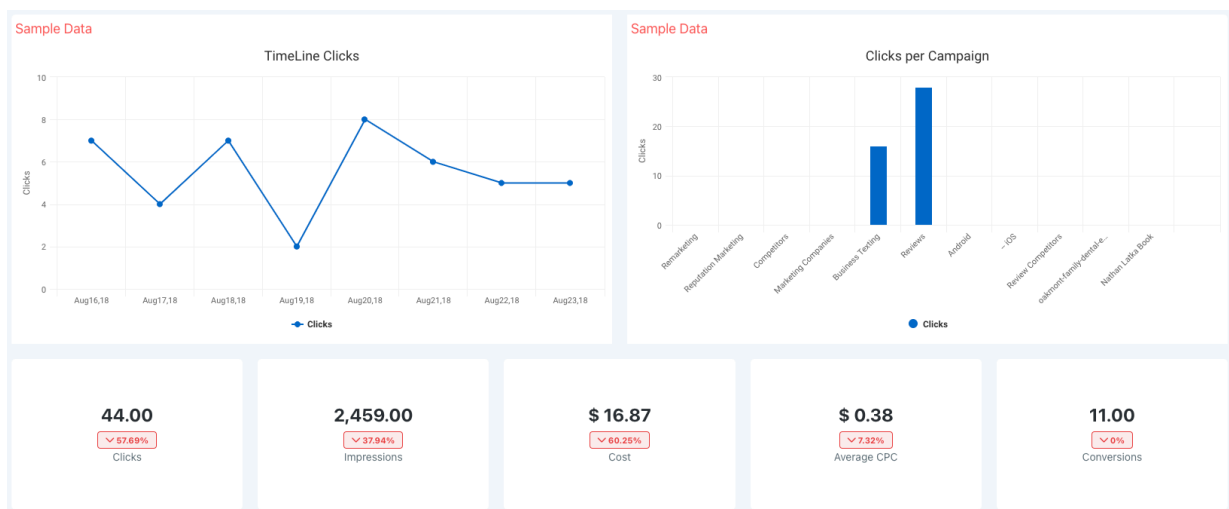
By doing this, you can keep an eye on the health of your business, as well. You want to make sure that you can get better reviews to be able to stand out and track it all in one specific area.

3. How to move your audience to that next step



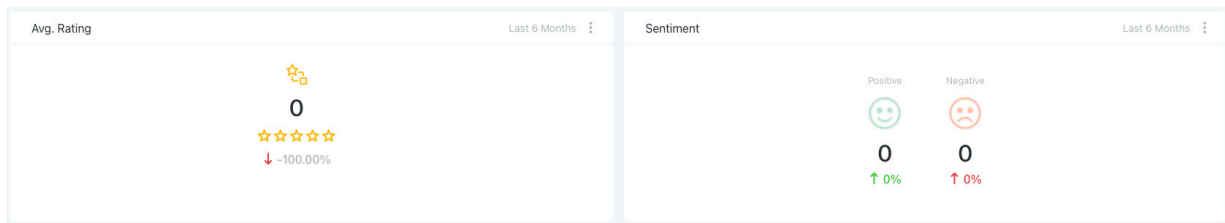
After someone has bought your offer, you can utilize the calendar to keep track of your leads and sell them to a higher ticket offer. It can also integrate seamlessly with Google.

4. Keep updated on your reports



Take this as the engine of your business where you are able to have all of your most important stats in one place to glance through them. For example, all the items that you need to track on Facebook can be done here.

5. Get good reviews



Now that you already have a buyer, you can set up a sequence to garner testimonials from here. This will make the experience more personal and make sure that you are communicating with them on many different channels.

6. Keep track of what the reviews look like

The 'Latest Review' section displays two testimonials from Facebook users. A 'View All' link is located in the top right corner.

- Review 1:** By Eslam M. Salah (5 stars, smiley face icon), dated Jan 17th 2022, 11:50pm. The text reads: "I rarely hold a pen and take notes when listening to anyone. Well, when it comes to Peng, I rarely just listen without taking notes like CRAZY. Thanks, man for the FREE value shared during Virtual Event Codex that can't simply be obtained in a single lifetime! Honestly, The free value shared was too overwhelming that I felt guilty and had to upgrade to VIP 😊 You're such a great inspiration to all shy, introverted people :D"
- Review 2:** By Irena Škamperle (5 stars, smiley face icon), dated Jan 16th 2022, 2:04pm. The text reads: "Although (due to time differences) it was sometimes quite a challenge for me to follow the schedule from Slovenia, it was worth all the effort. I encourage everyone to attend Peng Joon events and see his way of creating extraordinary value for his clients."

By doing this, you can keep an eye on the health of your business, as well. You want to make sure that you can get better reviews to be able to stand out and track it all in one specific area.

Once you get this engine up and running, it will make an enormous difference for your business.

ACTIONABLE CHECKLIST:

Top Of The Funnel

Create a Twilio Account

A Twilio account is a communication tool to help host messaging channels (SMS messaging and Whatsapp, etc). In simple terms, this is an account for you to host a number so you can communicate via SMS and voice calls.

Create a Mailgun Account And Configure Your SMTP Email

A Mailgun account is an integration platform to help manage your email deliverability. You can send out and receive emails by connecting Mailgun to our software. Not only that, this platform will help validate your leads so that you can have a strong active list.

Add a Phone Number

After connecting your Twilio account, you'd want to also have a Cartnetics phone number (don't worry it's FREE) so that you can call your clients straight from our software.

Connect Social Media Platforms

Manage ALL of your social media conversations under ONE ROOF by connecting your Facebook page and Instagram account. No longer do you need to go through multiple applications to secure your potential lead once you set this up.

Embed Your Chat Widget To Your Websites

Increase your revenue by 40% by making it easier for clients to reach out to you through chat widgets that can be easily added to your funnels, website or landing pages.

Middle Of The Funnel

Setup Your Domain

Utilize a domain to start hosting your funnels, website, and pages to increase business visibility.

Migrate Your Funnels

Start migrating your funnels over! If you are a Clickfunnels user, you can easily move your funnel steps with our 1 click migration. All you have to do is just paste your funnel step link, and you're good to go. (Do note that our 1-click migration migrates 95% of your funnels. Background images will not be migrated if you do not upload your images to the media library.)

Claim Our Top Proven Funnel Templates

Our top proven funnels are already in your account so all you have to do is go ahead and tweak the images, headlines and copy according to your business, niche, or industry. Take a preview look at the funnels here: ==> <https://cartnetics.com/bonuses>

Set Up Email Campaigns

At this stage, you would want to start implementing systems and processes to automate your workflow for every possible scenario your audience may encounter when they move from one step to the next in your sales process.

Automate Your Workflows & Triggers

Once you set up a workflow, you want to create a process for automation. Under campaigns, there will be triggers where you will be able to think about different scenarios e.g: when a person creates their account, when somebody applies for a strategy call, if they bought the product, etc. At this stage, you can model our automation found in the account.

Bottom Of The Funnel

Create Pipelines For Your Leads

Manage your leads by creating pipelines and their stages. These pipelines will allow you to track your customer's ascension and initiate back-end processes based on their stages.

Schedule Discovery Calls/Appointments With Your Clients

With this software, you will be able to set up and customize team calendars while also determining your availability so that you and your team are able to reach out to your clients one-on-one and close your leads.

Track Your Reports Under ONE ROOF

The power of Cartnetics lies in its ability to keep everything in one software, including your reports to understand how your business is performing. Start tracking reports such as Facebook ads, lead attributions, call reportings, etc.

Garner Testimonials Or Encourage Your Audience To Leave Reviews

To further increase your business branding, send review requests to boost your reputation so that you will have a bank of reviews to rely on.

ADDITIONAL

How You Can Get Help To Kickstart Your Cartnetics Journey:

Help Library

The Help Library is specifically designed to give you support on any technical question you may have regarding the software.

LIVE Chat Support

Besides that, you can also utilize the live chat which is from 6 AM to 9 PM PST. If you still have burning questions, drop an email to support@cartnetics.com and someone from the team will reach out to you soon.

Be A Part Of Our Gamechanger Community

*If you want to start networking with a group of like-minded people, go ahead and join our Facebook community:
==> <https://www.facebook.com/groups/cartnetics>*

Let's get to it!

Your #1 Fan,
Peng Joon

