

ASSESS YOUR PROJECT PLAN

DATA

Will you need a form to ask them for information or another element to collect data



1

Will You Need A Form or
Use a form to collect straight
survey for logic & disqualifica
element for payment

Form Name -



2

Will You Need A Calendar?
If you would like this project to
will need a calendar to connect

Calendar Name -



3

Will You Need A Pipeline
Track the progress of
sales, onboarding

S

01

PROJECT DETAILS

Use this name throughout all the pieces of this project

T

02

AUDIENCE

Who is the ideal audience for this project?

Z

W

03

WHAT DATA WILL YOU COLLECT

Will you need a form to ask them for information or another element to collect data

T

Z

04

WILL YOU NEED A LANDING PAGE

Will you need a funnel or website page to send them to that you can design to your brand

O

05

SETUP AUTOMATION

Setup your workflow(s) to connect all of the pieces you created for a smooth experience

O

01

DETAILS

Use this name throughout all the pieces of this project as well as brainstorm other important details.

U - ALL

U - Check In's

U - Exam Notifications

U - Marketing Messages

U - Progress Updates

U/R - Update Alerts

Z-003-1. Webchat

Z-003-2. GMB Messaging

Z-003-3. Facebook Messenger

1

Name

We suggest naming all pieces of a project something similar to make it easy to find & troubleshoot

2

Launch Date

When will you need this to be completed & tested? We always encourage starting a project at least 30 days before launch

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3

Deliverables

What will they receive by being part of this project? Are they getting something of physical or mental value

4

Pricing

Consider if you will need to require a regular free form or an order form on a funnel page.

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5

Goal

Your goal could be an internal milestone or a sales goal. You may have many smaller project goals to complete a larger project

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02

AUDIENCE

Who is the ideal audience for this project?



1

Ideal Client

Who is the perfect customer type for your project? Describe their characteristics to personalize messaging to them



2

Create A Smartlist

Save a smart list of the list of people that enter your project so you can find everyone easily & view data

List Name -



3

Do You Have Affiliates

Reach out to your favorite clients or partners to see if they want to promote your project, list their names below



4

Promotion

Where will you promote your project?

Your List

Power Partners

Blog

Webinars

Advertising

Social Media

Contests

Website

Joint Venture

Videos

Conference

Meetings

Summits

Affiliates

03

DATA

Will you need a form to ask them for information or another element to collect data



1

Will You Need A Form or Survey?

Use a form to collect straightforward information, use a survey for logic & disqualification, and an order form funnel element for payment

Form Name -



2

Will You Need A Calendar?

If you would like this project to be based of an appointment, you will need a calendar to connect to your project

Calendar Name -



3

Will You Need A Pipeline?

Track the progress of your contacts through your process like sales, onboarding, program journey, etc. List your steps



4

Do You Want To Add Tracking Tags?

Tags are used to track the behavior of contacts, what step they're on, and events they attended, and can be used to create smart lists later



5

Will You Need A Smartlist?

Save a smart list of the list of people that enter your project so you can find everyone easily & view data

Smartlist Name -

04

SITE PAGE

Will you need a funnel or website page to send them to that you can design to your brand



1

How Many Pages?

Depending on your project, you may need 1 or more landing pages built within funnels or websites for registration, confirmation, etc.



2

Design It!

Design the page to your brand & aesthetic. You can check out our various other workbooks for more information on how to design & build a page



3

Add Your Opt-In

In order to track leads & automate your project, we need to know who the contact is via your form, survey, order form, etc. elements



4

Add Your Paid Products If Needed

Depending on your project, you may have products you need to connect to your funnel or website page for payment



5

Add Your Domain

Under your site settings, pull in a domain (see domain workbook for more info) to connect to your page & send visitors to your pages

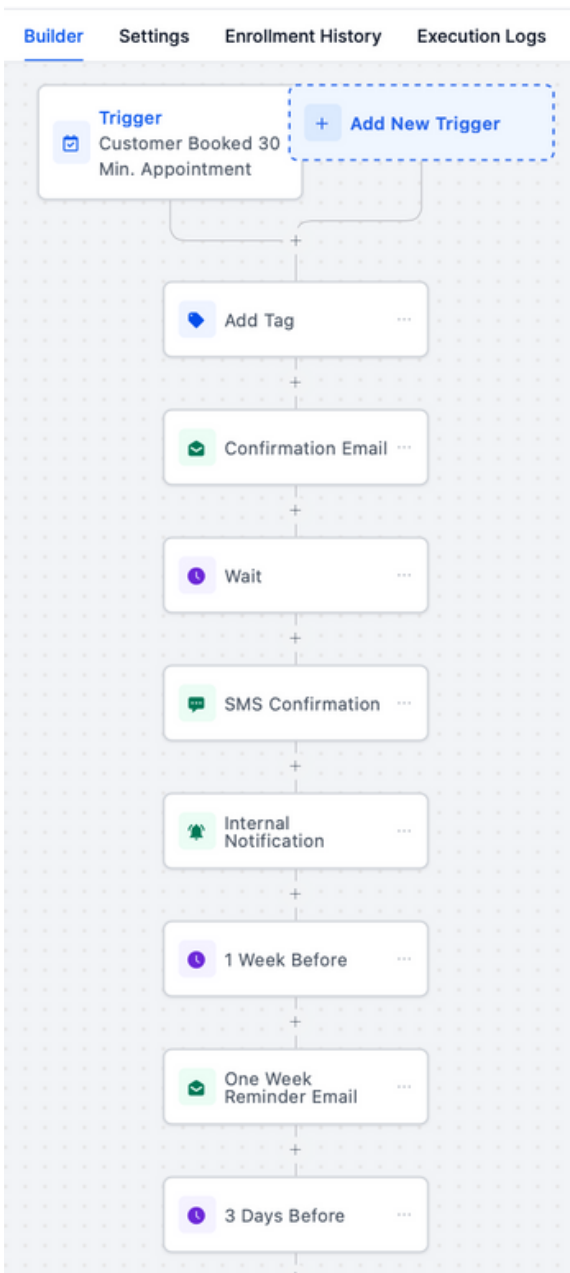
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Example - www.yourcompanydomain.com/signup

05

AUTOMATION

Setup your workflow(s) to connect all of the pieces you created for a smooth experience



1 Know you need to build one
If you can form your goal into an "if this, then that" statement or you want the system to execute certain actions automatically

2 Create your connected pieces
Make sure your other pieces like a form or landing page are at least created so you can connect them & configure your settings

3 Create your trigger & specify it's filters

[Blank area for notes]

4 Brainstorm action steps for the system to execute

[Blank area for notes]

5 Do you need to add an event start date action or remove them from another workflow?

[Blank area for notes]

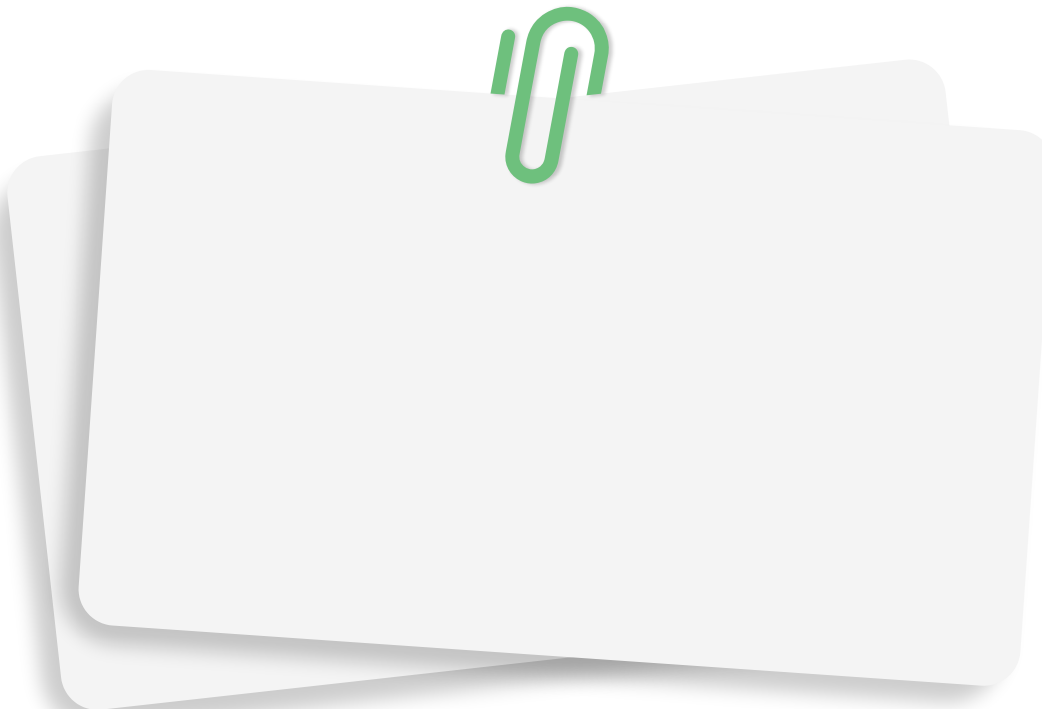
6 Will you need any special operation steps such as branches, waits, etc.?

[Blank area for notes]

NEED MORE HELP?

CHECKOUT OUR SUPPORT OPTIONS & RESOURCES

Our team is fully dedicated to supporting you every step of the way, ensuring your success. You can review the wide range of resources and support options available to guide you through any challenges or inquiries. Don't hesitate to reach out to our team whenever you need additional assistance; we're always here to help!



ALL INFORMATION IS SUBJECT TO CHANGE AS THE SOFTWARE UPDATES AND GROWS. NEW VERSIONS OF THIS WORKBOOK WILL BE EDITED FOR UPDATES AND NEW FEATURES.

← A-101-1. St

Steps Stats Sale

✔ Launch C

Funnel Steps

✔ A-101-1.
(Sales/In

✉ Onboardi

✉ Z-010-2.

✉ Call Statu

✉ test

