

ASSESS YOUR PROJECT PLAN



July 2023

STEPS

01

PROJECT DETAILS

Use this name throughout all the pieces of this project

02

AUDIENCE

Who is the ideal audience for this project?

03

WHAT DATA WILL YOU COLLECT

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

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

05

SETUP AUTOMATION

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

01

DETAILS

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

1 - Onboarding - Purchased Subscription

published

2 - Onboarding - Contract Signed & Welcome

published

3 - Onboarding - Account Setup & Login

published

4 - Onboarding - Intro Session Booked

published

5 - Onboarding - Accountability Call Booked

published

6 - Onboarding - Accountability Results Entered

published

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?

- | | |
|-------------------------------------|--------------------------------------|
| <input type="radio"/> Your List | <input type="radio"/> Power Partners |
| <input type="radio"/> Blog | <input type="radio"/> Webinars |
| <input type="radio"/> Advertising | <input type="radio"/> Social Media |
| <input type="radio"/> Contests | <input type="radio"/> Website |
| <input type="radio"/> Joint Venture | <input type="radio"/> Videos |
| <input type="radio"/> Conference | <input type="radio"/> Meetings |
| <input type="radio"/> Summits | <input type="radio"/> 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

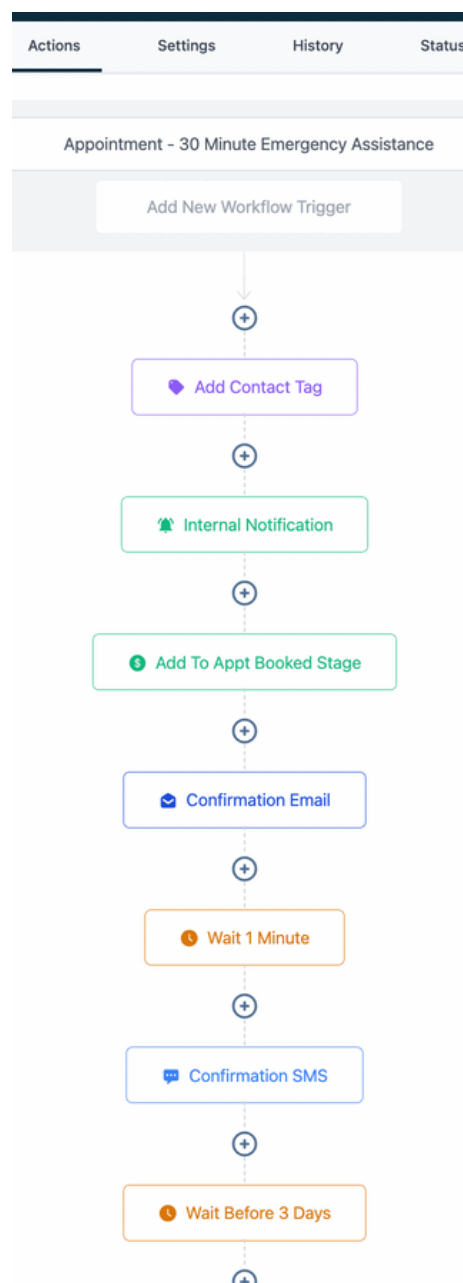
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Example – www.yourcompanydomain.com/signup

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

4

Brainstorm action steps for the system to execute

5

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

6

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