



Freelancer/Agency Path

All the things you need to do to get your course launched with FG Funnels.

Step One: FG Funnels Setup

CHECK OFF BEFORE PROCEEDING:

- I have a domain installed in my account.
- I have a subdomain created for my course dashboard.
- I have a professional email address.
- I have Mailgun installed in my account (for email follow up) or I plan to use Zapier to a 3rd party email provider.
- I have Stripe installed + integrated.
- I have customized my user signature in settings.
- I have my unsubscribe process complete and setup.
- I have connected my Google account.

*** Please refer to the FG FUNNEL SETUP guide to get all these steps accomplished!*

Step Two: Build Your Service Based Website

CHECK OFF BEFORE PROCEEDING:

- Create your forms + calendars.
 - Optin Form



- Discovery Call Form
- Create Team Calendar
- Create a five page website.
- Style the website with your copy + branding.
- Install the optin form that you'd like to use on the optin.
- Mobile optimize the website.
- Install the discovery call application.
- Install the calendar.
- Customize the SEO and general settings of the pages.
- Set the domain and URL paths for the funnel.
- Set a favicon for the funnel.
- Install any pixel or tracking codes in the header section of the funnel settings.

Step Three: Services Funnel Automation

PLEASE NOTE. There are two ways to do the same thing currently. One is in workflows, and one is in campaigns + triggers. We recommend Workflows.

- Make an order form + order confirmation for the intensive or VIP day!
 - Make it in funnels, not websites.
- Create A Pipeline + Stages
 - Optin
 - Discovery Call Booked
 - Intensive Accepted
 - Intensive Booked
 - Intensive Follow Up



- Intensive Not Accepted

- Create Your Tags
 - Optin
 - Discovery Call Booked
 - Intensive Accepted
 - Intensive Paid
 - Intensive Booked
 - Intensive Follow Up
 - Intensive Not Accepted

- You need six workflows as a freelancer/agency:
 - Discovery Call Booked Workflow
 - Intensive Accepted Workflow- sending them to pay + book their intensive or VIP day
 - Intensive Paid Workflow
 - Intensive Booked Workflow - appointment reminders
 - Intensive Follow Up Workflow - emailing to close the deal
 - Appt Reminders workflows - Generic

- Discovery Call Booked Workflow**
 - Trigger = Appointment
 - Filter in calendar - Discovery Call Calendar
 - Filter in appt status - confirmed
 - Action 1 = Assign User
 - Action 2 = Add Contact Tag - Discovery Call Booked
 - Action 3 = Update Pipeline Opportunity
 - Stage = Discovery Call Booked
 - Action 4 = Send Notification To Yourself



- ❑ Action 5 = Send Email

- ❑ **Intensive Accepted Workflow**

- ❑ Trigger = Pipeline Status Changed
 - ❑ Filter stage - moving to intensive accepted stage
- ❑ Action 1 = Assign User
- ❑ Action 2 = Remove Contact Tag
 - ❑ Discovery Call Booked
- ❑ Action 3 = Add Contact Tag - Intensive Offer Accepted
- ❑ Action 4 = Send Email, Text + Next Steps
 - ❑ Order Form

- ❑ **Intensive Paid Workflow**

- ❑ Trigger - (2 step order) Someone buys a product
 - ❑ Filter - Intensive Product
- ❑ Action 1 = Assign User
- ❑ Action 2 = Remove Tag Intensive Accepted
- ❑ Action 3 = Add Contact Tag
 - ❑ Intensive Paid
- ❑ Action 4 = Update Opportunity
- ❑ Action 5 = Send Email

- ❑ **Intensive Booked Workflow**

- ❑ Trigger = Appointment
 - ❑ Filter in calendar - Intensive Calendar
 - ❑ Filter in appt status - confirmed
- ❑ Action 2 = Add Contact Tag - Intensive Call Booked
- ❑ Action 3 = Update Pipeline Opportunity
 - ❑ Stage = Intensive Call Booked
- ❑ Action 4 = Send Notification To Yourself



- ❑ Action 5 = Send Email

- ❑ **Follow Up Workflow**

- ❑ Trigger = Pipeline Status Changed
 - ❑ Filter in stage - follow up
- ❑ Action 1 = Assign User
- ❑ Action 2 = Add Contact Tag - Follow Up
- ❑ Action 3 - Delay 24 hours
- ❑ Action 3 = Send Email
 - ❑ If/else = Contact Details / Tag / Includes / Intensive Call Booked or Intensive Offer Paid / YES = Remove Follow
 - ❑ No = Send 2nd Email

- ❑ **Appointment Reminders Workflow (use pre made recipe)**

- ❑ Trigger = Appointment Status Confirmed
- ❑ Follow The Recipe

You can also create a POST VIP day flow where you follow up with any upsells or proposals!