Coach 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: Application Funnel Build

CHECK OFF BEFORE PROCEEDING:

- ❏ Create your forms + calendars.
    - ❏ Optin Form

- ❏ Application Form
    - ❏ Create Team Calendar
- ❏ Create a three page funnel.
    - ❏ Sales Page with Pop up optin
    - ❏ Application Page
    - ❏ Calendar Page
- ❏ Style the funnel with your copy + branding.
- ❏ Mobile optimize the funnel.
- ❏ Install the optin form that you'd like to use on the optin.
- ❏ Install the 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: Application 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.

- ❏ Create A Pipeline + Stages
    - ❏ Optin
    - ❏ Application Received
    - ❏ Call Booked
    - ❏ Offer Accepted
    - ❏ Follow Up
    - ❏ Offer Not Accepted

- ❑ Create Your Tags
  - ❑ Optin
  - ❑ Application Received
  - ❑ Call Booked
  - ❑ Offer Accepted
  - ❑ Follow Up
  - ❑ Offer Not Accepted

- ❑ You need six workflows as a coach:
  - ❑ Optin workflow - when popup gets submitted
  - ❑ Application received - notifies you
  - ❑ Call booked workflow - appointment reminders
  - ❑ Offer accepted workflow - new client
  - ❑ Follow up workflow - emailing to close the deal
  - ❑ Appt Reminders workflows - Generic

- ❑ **Optin Workflow**
  - ❑ Trigger = Form submission
    - ❑ Filter form
  - ❑ Action 1 = Assign User
  - ❑ Action 2 = Add Contact Tag - Optin
  - ❑ Action 3 = Update Pipeline Opportunity
    - ❑ Stage = Optin
  - ❑ Action 4 = Delay: Wait for Four Hours
    - ❑ If/Else Condition = Contact Details / Tag / Includes / Application Received / YES = Remove Optin Tag
    - ❑ If/Else Condition = NO
  - ❑ Action 5 = Send Email About Filling Out Application

- ❑ **Application Received Workflow**

- ❏ Trigger = Form submission
    - ❏ Filter application
- ❏ Action 1 = Assign User
- ❏ Action 2 = Remove tag Optin
- ❏ Action 3 = Add Contact Tag - Application Received
- ❏ Action 4 = Update Pipeline Opportunity
    - ❏ Stage = Application Received
- ❏ Action 5 = Send Notification To Yourself
- ❏ Action 6 = Delay: Wait for Four Hours
    - ❏ If/Else Condition = Contact Details / Tag / Includes / Call Booked / YES = Remove Application Received Tag
    - ❏ NO - Send a follow up email

❏ **Call Booked Workflow**

- ❏ Trigger = Appointment
    - ❏ Filter in calendar - appointment
    - ❏ Filter in appt status - confirmed
- ❏ Action 1 = Assign User
- ❏ Action 2 = Remove Contact Tag
    - ❏ Optin
    - ❏ Application Received
- ❏ Action 2 = Add Contact Tag - Call Booked
- ❏ Action 3 = Update Pipeline Opportunity
    - ❏ Stage = Call Booked
- ❏ Action 4 = Send Notification To Yourself
- ❏ Action 5 = Send Email

❏ **Offer Accepted Workflow**

- ❏ Trigger = Pipeline Status Changed

- ❏ Filter stage - moving to offer accepted stage
- ❏ Action 1 = Assign User
- ❏ Action 2 = Remove Contact Tag
  - ❏ Optin
  - ❏ App Received
  - ❏ Call Booked
- ❏ Action 2 = Add Contact Tag - Offer Accepted
- ❏ Action 3 = Send Welcome Email + Next Steps
- ❏ Action 4 = Optional - Webhook (for contract + invoicing)

- ❏ **Follow Up Workflow**
  - ❏ Trigger = Pipeline Status Changed
    - ❏ Filter in stage - follow up
  - ❏ Action 1 = Assign User
  - ❏ Action 2 = Remove Tag
    - ❏ Optin
    - ❏ App Received
    - ❏ Call Booked
  - ❏ Action 2 = Add Contact Tag - Follow Up
  - ❏ Action 3 = Send Email
    - ❏ If/else = Contact Details / Tag / Includes / Call Booked or Offer Accepted / YES = Remove Follow
    - ❏ No = Send 2nd Email

- ❏ **Appointment Reminders Workflow (use pre made recipe)**
  - ❏ Trigger = Appointment Status Confirmed
  - ❏ Follow The Recipe

Step Four: Lead Funnel Build

CHECK OFF BEFORE PROCEEDING:

- ❑ Watch the LEAD FUNNEL walkthrough (under learning through a funnel)

Step Five: Lead Funnel Automations

CHECK OFF BEFORE PROCEEDING:

- ❑ Watch the LEAD FUNNEL automations (under learning through a funnel)