

POST LAUNCH

"Our goals can only be reached through a vehicle of a plan, in which we must fervently believe, and upon which we must vigorously act. There is no other route to success."

Pablo Picasso

CONTENT DELIVERY

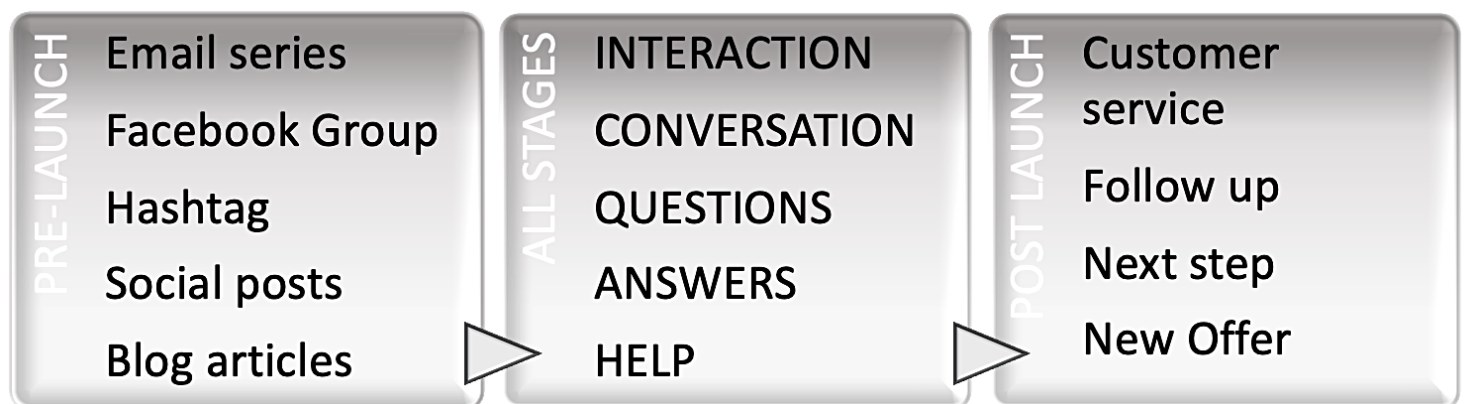
This workbook will cover Step #8; Post Launch

Step #1 - Coming up with content ideas and creation

Step #2 - Development of the content idea & audience

Step #3 - Pulling it all together & The Big Question

Following Workbooks will cover the pre-launch, engagement, and post-launch processes



Step #4 - Developing Your Through-line; Front-end through High-ticket

Step #5 - Pre-launch preparation

Step #6- All-phase engagement

Step #7 - Content delivery process

Step #8- Post-launch

Retention Rules

- Product Guarantee
- Clear & Firm Refund Policy
- Under-Promise & Over-Deliver
- Payment-Option Consistency: limit to a 2-part payment
- Always be consistent in everything you do
 - your offers, your presence, your communications
- Support Your Stars
 - Give support & recognition to those that consistently contribute to your community
- Continue To Add Value
 - extra Q&As, consults, opportunities, etc. to keep them engaged
- Weekly Catch-Up Emails/Newsletter
 - This is also a great place to highlight your star members
- Face-To-Face: facilitate face-to-face opportunities
- Pay In Full Options at a discount

What do you do on a daily, weekly, and monthly basis? Sort those tasks into Automate or Delegate categories. This list is meant to be fluid so feel free to make changes along the way.

Daily Tasks:	
AUTOMATE	DELEGATE

Weekly Tasks:	
AUTOMATE	DELEGATE

AUTOMATE

Monthly Tasks:

DELEGATE

Notes

Brain Dump Review

Systems and processes work best for tasks that are repeated on a regular basis. Think of all your business tasks. What processes and systems to you use regularly?

Some common examples of systems include creating graphics; getting a blog post published; creating an eBook, course, or group coaching program; sending out your monthly newsletter, etc.

If necessary, break down your business tasks into general categories, such as: Lead Generation, Client Onboarding, Product Sales, Billing, etc.

Review

Write out the steps for the following systems (or change these systems to match your own business). How can you make these systems and processes more streamlined to save more time?

Lead Generation

Client Onboarding

Client Experience

Follow-Up

Review

Write out the steps for the following systems (or change these systems to match your own business). How can you make these systems and processes more streamlined to save more time?

Billing/Invoicing

Product Creation

Content Marketing

Podcasting

Review

Write out the steps for the following systems (or change these systems to match your own business). How can you make these systems and processes more streamlined to save more time?

Video Marketing

Social Media Development

SEO/Hashtags/Etc

Other

Lead Generation Review

How to get leads in the door with ease, while you do other things....

Review and make updates to these items OR start from scratch and create a brand-new lead magnet (especially if the one you have currently isn't bringing in leads or is outdated).

Current Lead Magnet ·Include title, general topic, and if it's performing well with bringing in leads.

Brainstorm New Lead Magnet Ideas

Current Landing Page

- Is it performing?
- Does it look outdated?
- Are you using a paid platform, like LeadPages?
- Did you hire a designer or create it yourself?

Brainstorm New Landing Page Ideas

- Do you want to delegate to a copywriter and designer?
- How can it look modern?
- What features/benefits do you want to highlight?

Lead Generation Review

Current Email Sequence Details

- How many in the sequence?
- How frequently are they delivered?
- What are your open rates and click rates?
- Does each one have updated/ evergreen information?
- Who is your email provider?

Brainstorm New Email Sequence Details

- How many in the sequence?
- How frequently are they delivered?
- What are your open rates and click rates?
- List topics for each email.
- Are you happy with your current provider?

Current Landing Page

- Is it performing?
- Does it look outdated?
- Are you using a paid platform, like LeadPages?
- Did you hire a designer or create it yourself?

Brainstorm New Landing Page Ideas

- Do you want to delegate to a copywriter and designer?
- How can it look modern?
- What features/benefits do you want to highlight?

Research Landing Page Platforms

If your WordPress theme doesn't include a landing page template, research options for drag-n-drop templates. Compare features and pricing before purchasing.

Option #1

Option #2

Option #3

Option #4

Research Email Service Providers

Research options for email service providers. Compare features and pricing before purchasing.

Option #1

Option #2

Option #3

Option #4

Research Social Media Scheduling Tools

Research options for SM scheduling providers. Compare features and pricing before purchasing.

Option #1

Option #2

Option #3

Option #4

Research Evergreen Webinar Options

Research options for evergreen webinar providers. Compare features and pricing before purchasing.

Option #1

Option #2

Option #3

Option #4

Automate Your Social Media

Master 'automatic marketing' to nurture new prospects without working 24/7. Even though social media requires SOME level of interaction, that doesn't mean you have to be glued to it 24/7. Map out how you can automate your social media calendar so you can enjoy some downtime.

What SM platforms do you use?

How will you schedule posts? Did you choose a scheduling tool from the previous step?

Can your scheduler cross-post to multiple platforms?

Does your VA or trusted team member know how to use this scheduling tool? Or will they require extra training?

It's Time To Delegate!

Plan who can take on these tasks for you. Include the contractor's contact info and if they were referred, who gave you their name?

Social Media: Content Writer

Social Media: Hashtag Research

Social Media: Formatting & Finding Graphics

Social Media: Scheduling Posts

Social Media: Repurposing Old Content Into A New Format

Blogs: Writing Posts & Titles

Blogs: SEO/Keyword Research

Blogs: Formatting & Finding Graphics

Blogs: Scheduling Posts

Blogs: Repurposing Old Content Into A New Format

It's Time To Delegate!

Plan who can take on these tasks for you. Include the contractor's contact info and if they were referred, who gave you their name?

Video: Editing

Video: Create Intro & Closing Bumpers

Video: SEO Keyword Research

Video: Graphics Creation

Video: Transcription

Podcast: Audio Editing

Podcast: Create Intro & Closing Music or Voice Over

Podcast: Write up show notes

Podcast: Upload To Hosting Account

Podcast: Publish To Website

Delegate Graphics Creation

Research graphic designers. Ask questions, then compare portfolios and pricing before hiring.

Option #1

Option #2

Option #3

Option #4

Research Online Scheduling Options

Simplify scheduling systems to make signing new clients a breeze.

Research options evergreen webinar providers and tools. Compare features and pricing before purchasing.

Option #1

Option #2

Option #3

Option #4

Delegate Bookkeeping

Any time you're hiring someone to handle your money, keep a careful watch and ask for monthly reports so you are still in control and know exactly how much your business makes each month and if all your clients are paid up. Ask for referrals from business associates and perform interviews with each candidate.

Option #1

Option #2

Option #3

Option #4

Research Bookkeeping Software

Not ready to delegate your bookkeeping tasks? No problem. Research the multitude of bookkeeping software available for small businesses. Compare features, ease of use, and pricing before purchasing.

Option #1

Option #2

Option #3

Option #4

Automated Client Onboarding

Keep your clients happy, and confident in you, with a smooth & seamless client experience. Map out an onboarding system describing what happens at each step of the way, from the time a prospect finds you until they sign their contract.

How do you attract prospects?

How do you get them to know, like, and trust you?

What offers do you have available to them?

How do you know when to make those offers?

Automated Client Onboarding

Keep your clients happy, and confident in you, with a smooth & seamless client experience. Map out an onboarding system describing what happens at each step of the way, from the time a prospect finds you until they sign their contract.

Do you offer discovery calls? When? How long into this process?

Once they've said yes - Now what happens?

Do you require payment before or after your discovery call? Why?

How do you deliver the contract?

How do you get signatures and book the first session?

Research Project Mngmt or CRM Platforms

If you need help staying organized, one of these options might be the way to go. Compare features and pricing before purchasing.

Option #1

Option #2

Option #3

Option #4

Automate Your Client Care Efforts

Do you want to send gifts for special events in your clients' lives? Or Happy New Year cards in January? Create a gift process or system complete with gift choices, online ordering links, and price ranges for your team to follow. Create automated reminders about when to send these gifts.

Life Event Ideas	Price Range
Welcome Pkg.	
Birthday/E-cards	
Thank You Cards/Gifts	
Wrap-up cards/Gifts	
Holiday cards /Gifts	
Business Milestone	
Other	

Research Help Desk Options

If the bulk of your day is spent answering customer service calls, research if using a help desk is cost effective. Compare features and pricing before purchasing.

Option #1

Option #2

Option #3

Option #4

Automate Your Offboarding System

Nurture your clients, old and new, without lifting a finger! It's inevitable that you will have clients leave your service. Take this opportunity to thank them for their loyalty and to stay in touch via email. You never know when they'll need your services again.

Send a wrap-up email: Notes

Send a testimonial request: Notes

Send a referral request: Notes

Send a special promo for past clients email: Notes

Automate Your Offboarding System

Send a 'how are you doing?' email: Notes

Send a 'following up on continuing progress' email: Notes

Other ideas: Notes

Week 1

MONDAY	
AM	PM
1. Take notes about what business systems or processes you currently have in place. 2. OR write down the tasks you do every day, week, or month. 3. Sort these tasks into two categories: Automate or Delegate.	Coach clients
TUESDAY	
AM	PM
1. Check that you have systems written down for: • Blogging • Product creation • Creating graphics • Podcasting • Social media marketing • Email marketing • Lead generation • Content marketing creation • Client experience • Follow up 2. Gather all these systems into a Standard Operating Procedure (SOP) document. 3. If you have a VA, delegate some of this writing/documenting to her.	Coach clients

Week 1

WEDNESDAY	
AM	PM
1.Review your current lead generation process. ·Update your lead magnet, landing page, and welcome email sequence (as needed) 2.Research pricing and features for new lead generation tools/automations.	Coach clients
THURSDAY	
AM	PM
1.Review how you drive traffic to your landing page for your lead magnet. 2.Research the benefits and pricing for utilizing: ·Facebook and Instagram ads ·A Facebook ads manager/expert ·Evergreen webinars 3.Research the pricing and benefits of hiring a VA to oversee the above tasks (and others). ·Ask for referrals from business friends and start formulating an interview process.	Coach clients
FRIDAY	
AM	PM
1.Review your week. 2.Catch up on finishing all tasks. 3.Schedule next week.	Coach clients

Week 2

MONDAY	
AM	PM
1.Explore ways to automate your social media. 2.Research features and pricing of social media scheduling tools. 3.Research if it's cost effective to delegate your social media by hiring a VA or social media manager.	Coach clients
TUESDAY	
AM	PM
1.Explore ways to delegate your blogging process. 2.Research pricing for content writers. 3.Consider hiring a VA to handle all the tasks other than writing. • .Formatting posts • .Sourcing, creating, and inserting graphics • .SEO research • .Repurposing blog posts into other formats • .Scheduling to publish • .Sharing posts via social media scheduler 4.Start the interview process.	Coach clients

Week 2

WEDNESDAY	
AM	PM
1. Research ways to delegate your video marketing tasks: • Video editing • Create a video intro or bumper you use on each video • Publish videos to your platforms • SEO keyword research • Thumbnail creation • Graphics in videos • Video transcription 2. Research names and pricing for video editors, graphics creators, and VAs with video marketing experience. 3. Start the interview process.	Coach clients
THURSDAY	
AM	PM
1. Research ways to delegate your graphic creation tasks. 2. Get referrals for graphic designers from business friends. 3. Research pricing. 4. Start the interview process.	Coach clients
FRIDAY	
AM	PM
1. Review your week. 2. Catch up on finishing all tasks. 3. Schedule next week.	Coach clients

Week 3

MONDAY	
AM	PM
1.Explore pricing and features for online automated scheduling apps or tools. 2.Research which features you need and which ones you can grow in to. 3.View the platform tutorials and decide on ease of use, for both you and your clients. 4.When you make your choice, delegate the setup of your calendar to your VA.	Coach clients
TUESDAY	
AM	PM
1.Review your current payment processing system. 2.If it does not work for you, research new payment processing options. 3.Compare features and pricing. 4.Delegate the setup to your VA. 5.Review the process yourself so you can explain it to your clients.	Coach clients

Week 3

WEDNESDAY	
AM	PM
1. Review your current pricing · Is it time for a rate increase? 2. Review your cancellation and no-show policies and make revisions, as necessary. 3. Create a procedure for handling 'failed payments' and refunds. 4. Alert your current clients to any changes in their billing plans. 5. Utilize subscription billing plans wherever possible.	Coach clients
THURSDAY	
AM	PM
1. Decide if you want to delegate your bookkeeping tasks to a professional or automate it with in-house software. 2. Ask for bookkeeping referrals and start the interview process. 3. OR purchase a software that you find easy to use and watch the video tutorials.	Coach clients
FRIDAY	
AM	PM
1. Review your week. 2. Catch up on finishing all tasks. 3. Schedule next week.	Coach clients

Week 4

MONDAY	
AM	PM
1.Create a client onboarding process or make revisions to your current process. 2.Research ways to automate parts of the onboarding. 3.Decide which onboarding tasks to delegate to your VA.	Coach clients
TUESDAY	
AM	PM
1.Analyze if you need a project management system or a CRM system. 2.Explore features and pricing. • -It's OK to say no if it seems like too much. • -It's also OK to start with the smallest plan and grow into a larger plan. This is true with ANY platform or tool! 3.Explore third-party apps to compare features with those project management systems.	Coach clients

Week 4

WEDNESDAY	
AM	PM
1. Review your coaching contracts and update if necessary. 2. Register with HelloSign to speed up the contract signing process. 3. Set up calendar reminders for holiday or event gifts, such as: • Welcome package or gift • Virtual birthday gifts/e-cards • Thank you cards/gifts • Wrap up cards/gifts • Holiday cards/gifts	Coach clients
THURSDAY	
AM	PM
1. Explore whether you have enough customer service inquiries that you need to hire a help desk. 2. Research different help desk solutions and their pricing. 3. Choose a solution and get it implemented with the help of their staff or your own VA.	Coach clients
FRIDAY: CLOSE-OUT	
1. Review and/or create an offboarding process. 2. Write a series of emails for these offboarding clients, including: • A wrap up email • A testimonial request email • A referral request email • A “special promo just for past clients” email • And a “How are you?” email	3. Schedule next week. 4. Declutter and update your office, hardware, equipment, etc. UNPLUG FOR THE WEEKEND!

CHECKLIST

	I understand that using automation and/or hiring a VA or support team is not cheating; it's working smarter, so you have more time to coach your private clients.
	I understand that I can start slowly with automation and build up to hiring a team as my budget allows.
	I understand that hiring a VA first might make financial sense as she can help set up any automations I want to use.
	I understand the only way I can up level my business is to create a support team.
	I understand that I need to let go of some control in order to delegate.
	I understand that I need to practice delegating and giving my team realistic deadlines and timelines instead of always needing things in a rush.
	I understand that difference between AUTOMATION and DELEGATION.
	I have outlined a list of all the systems I use in my business.
	Each system is written out from beginning to ending steps.
	I have updated all my business systems and compiled them into a Standard Operation Procedures document (SOP).
	I have provided great detail in each business system so that any VA or team member who reads this document will understand the exact steps to take as well as understand WHY they're doing it this way.
	I am open to ideas for streamlining these processes from my team members.
	I have a detailed list of the tasks I do every DAY, WEEK, or MONTH.
	I have decided which of these lists will become a process and which of these will be delegated or eliminated.
	I understand that I can automate anything that can be done by software on autopilot without much input from me.
	I understand that I can delegate anything that can't be automated but doesn't need to be done by me personally.
	I understand that LEAD GENERATION is vital to the success of my business and can be largely automated. My lead generation process includes: • A free lead magnet/gift • An opt-in page to collect email addresses • A welcome email sequence set up with my chosen email service provider

CHECKLIST

	I am ready to delegate the creation of my lead magnet OR I am prepared to create it myself.
	I have researched the platforms I can use to create an opt-in page OR I am prepared to hire someone to do it for me.
	I have researched different email service providers and am comfortable with how to use it to stay in touch with my subscribers.
	I have a welcome email sequence mapped out OR already created.
	I am prepared to drive traffic to my opt-in landing page by using one or a combination of the following automation options: • Facebook ads • Social media posts scheduled on Buffer (or another scheduling tool) • Evergreen webinars
	I am ready to delegate and automate parts of my EVERGREEN WEBINAR process to a trusted VA or expert: • Slide creation • Facebook and Instagram ad setup • Graphic design • Tracking webinar metrics
	I have researched my options for evergreen webinars and have chosen a platform.
	I understand that my SOCIAL MEDIA MARKETING process can be automated and/or delegated.
	I understand that automation can be used for: • Scheduling posts in advance • Posting on different platforms • Posting in groups and to business pages
	I understand that I can delegate these tasks to a VA along with the following tasks: • Content writing • Hashtag research • Finding stock photos or graphics • Repurpose old content from one platform to a new one • Facebook Group and/or Page management
	I have a BLOGGING SYSTEM mapped out which includes the following tasks which I can delegate: • Writing posts • Creating catchy titles for posts • Formatting posts • Sourcing, creating, and inserting graphics • SEO research • Repurposing blog posts (i.e. turn a blog post into a series of 3-5 Instagram posts) • Scheduling to publish • Sharing posts via social media scheduler or turning a blog post into an email

CHECKLIST

	I have a VIDEO MARKETING SYSTEM mapped out which includes the following tasks which I can delegate: • Video editing • Create a video intro or bumper you use on each video • Publish videos to your platform, such as YouTube or other social channels • SEO keyword research • Thumbnail creation • Graphics in videos • Video transcription
	I have a PODCASTING process mapped out which includes the following tasks which I can delegate: • Edit podcast • Record a podcast intro • Write up show notes • Publish podcast and show notes to your website or blog • Add the podcast to your hosting site • Add music overlay or voiceovers
	I have a list of GRAPHICS that I can delegate to my designer or team. They include but are not limited to: • Blog post template • Instagram Story template • Instagram post quote template • Pinterest graphic template • YouTube graphic template • Email marketing template
	I understand that automating my scheduling calendar is helpful to me AND to my clients.
	I have researched my scheduling options and have chosen a platform that fits my budget and I find easy to use.
	I am open to having my VA fill in my automated scheduling calendar and then giving me a tutorial so I know how my clients will use it.
	I understand that automatic billing – or subscription billing – is a time saver for me but also a convenience for my clients.
	I understand that I still need to pay attention to my monthly billing to be sure everything is running smoothly without mistakes.
	I have researched my subscription billing options and chosen a platform that is: • Easy for me to use • Connects directly to a payment processor • Has a plan for dealing with failed payments • Allows me to add custom coupon codes when I run sales
	I understand that BOOKKEEPING is another task that I can delegate or automate (to some extent).
	I understand that I still need to be involved in bookkeeping (just like the automatic billing) to be sure there are no mistakes made.

CHECKLIST

	I have gotten bookkeeping referrals and/or interviewed bookkeepers OR I have researched bookkeeping computer software and chosen one that I find easy to use and understand.
	I have mapped out a CLIENT ONBOARDING process, from the beginning when a prospect is interested in my business to the end, when they become a paying client.
	I understand that a robust project management system can offer workflow automations that make my client onboarding easy and less time consuming.
	I have also researched third-party platforms, such as IFTTT or Zapier, which can offer automations without purchasing an entire project management system.
	I understand that using a service like HelloSign speeds up the contract signing process.
	I understand that I can set up multiple email sequences, one for paid clients and another for prospects. • I have at least 2 sequences planned or written and set up to send automatically in my email autoresponder.
	I have a list of gift-giving dates set up as reminders so my team will have ample time to place an order and get them in the mail.
	I have autoresponder messages set to alert customers and clients that their email has been received and when they can expect a response from me.
	I have researched Help Desk features and pricing to determine if I need a platform like this.
	I have delegated my VA to monitor my email inbox and to set up systems that keep only the most important emails visible when I log in.
	I have an OFFBOARDING sequence mapped out and set up in my email autoresponder. This includes: • A wrap up email • A testimonial request email • A referral request email • A “special promo just for past clients” email • A “How are you?” email
	I have set up automated reminders on my calendar, CRM platform, or my phone for when to follow up with past clients.
	I have researched different CRM platforms, their features, and their pricing to determine if I need a platform like this.