

FAST-START CHECKLISTS

"No matter how expert
you may be, well-
designed checklists can
improve outcomes."

Steven Levit

Bump Offer Checklist

Use this checklist to ensure you create the most relevant and helpful bump offer possible.

- ☐ I am aware that bump offers increase my overall sales by 25-35%
- ☐ I have chosen shopping cart or funnel software that allows me to easily add - and track - bump offers
- ☐ This bump offer directly relates to my main offer
- ☐ This bump offer will enhance my main offer
- ☐ This bump offer adds real value to my main offer
- ☐ This bump offer adds a highly personalized option for a specific sector of my ideal customer base
- ☐ This bump offer provides components that my purchasers don't own
- ☐ This bump offer is enhancing a basic offer that is within reach of my less wealthy customers
- ☐ This bump offer is catching my customers while they are in purchase mode
- ☐ My bump offer is making it super-easy for customers to buy more - instantly
- ☐ I have ensured that my bump offer is not priced higher than my main offer:
- ☐ My bump offer has a lower price point than my main offer
- ☐ My bump offer has an equal price point to my main offer
- ☐ I realize my bump offer should be a no-brainer product or option (no separate sales page needed)
- ☐ I am positioning this extra offer as a bump offer instead of a post-sales upgrade because _____
- ☐ I have placed my bump offer on my checkout page at the point of purchase in the form of a simple checkbox option
- ☐ I am aware that an upsell offer (presented post-purchase) would be a better option if that offer requires further information (i.e., its own sales or landing page)
- ☐ My offer bump provides an easy, 'no-brainer' choice
- ☐ I am aware I can provide both a bump offer AND an upsell with the same main offer for even greater sales power
- ☐ I have optimized my order bump sales message, eliminating unnecessary text and stating clearly what's on offer
- ☐ I have emphasized the key benefit of adding the order bump
- ☐ I am tracking the effectiveness and impact of my bump offer

Content Creation Checklist

Use this checklist to create the most interesting, relevant, and effective content sure to please your ideal paying customer.

- ☐ I have determined whether it is best to write my own content or outsource it, leveraging the skills of a professional copywriter
- ☐ I have estimated the volume of content I need to create over the next year and whether or not I need:
 - ☐ A team of more than one writer
 - ☐ A project manager
 - ☐ Project management software
 - ☐ I have determined whether or not it would be an advantage to use CMS (a content management system such as MeetEdgar or Hootsuite)
- ☐ I am making sure each piece of content is making full use of optimized keywords – ones that my ideal customer uses in their Searches
- ☐ I am making sure I create and test the best headlines for each piece of copy
- ☐ I am making use of white space, graphics, subheads, and other elements like widgets and Johnson boxes to:
 - ☐ Emphasize key text
 - ☐ Keep readers scanning and engaged
 - ☐ Make actionable commands easier
 - ☐ Provide key information quickly and in the right spot
- ☐ I am putting as much care into platform bios and descriptions as I am into product writing and posts
- ☐ I am keeping paragraphs short but varying the cadence and length for maximum flow and readability
- ☐ I am using bullet point lists – especially for benefits
- ☐ I have identified the emotions I need to evoke in my content to connect with my ideal reader
- ☐ I have taken into account my ideal customer's psychographics and communication style when creating my content
- ☐ I have eliminated all unnecessary words that weaken the meaning and impact of what I'm trying to say (for example, meaningless phrases like, "Be that as it may" or adverbs like "very" and "really")

Content Creation Checklist Cont.

- ☐ I am writing batches of posts across all media for cohesion and consistency
- ☐ I am allowing my CMS to convert my posts into formats for specific social media platforms
- ☐ I have created templates for content types I plan to use regularly. For example:
 - ☐ Review templates
 - ☐ Email templates
 - ☐ Onboarding templates
 - ☐ Post templates
 - ☐ Press release templates
 - ☐ Product description templates
 - ☐ Landing page templates
- ☐ I have given my writers the checklists they need, a Style Guide, and a sample of my brand's written "voice."
- ☐ I am paying attention to the language style my ideal customer uses and responds to
- ☐ I have selected the most optimal content format and type for this particular customer at this time:
 - ☐ Video
 - ☐ Audio
 - ☐ Written
- ☐ Repurposing content into multiple formats and offers is a regular part of my sales strategy
- ☐ I am maximizing my content by bundling smaller related content pieces into cohesive bundles – plus breaking apart large projects to create bonuses or sell as individual lessons or modules
- ☐ I have created a documented system for powerful content repurposing and creation

Launch Checklist

Use this checklist to ensure you cover each step of this and every launch.

- ☐ I have identified the best goal for this launch
- ☐ I have researched and identified my target customer for this product or service
- ☐ I have isolated the strongest keywords that people search with
- ☐ I have reviewed all my existing content to see what items can best be repurposed into a product, membership resources, or course
- ☐ I have identified content I can repurpose as tripwire, OTOs or bump offers
- ☐ I have added extra offers that genuinely enhance my main offer
- ☐ I have created a strong brand identity and product name for my offer
- ☐ I have set up a CMS and uploaded promotional posts
- ☐ I have created a:
 - ☐ Launch Calendar
 - ☐ Editorial post calendar
 - ☐ Promotions and advertising calendar
 - ☐ A guest interview/guest blog spot schedule
- ☐ I have assigned tasks to the most specialized team members
- ☐ I have created templates for use in future promotions
- ☐ I have created affiliate resources and incentives:
 - ☐ Exclusive coupon codes
 - ☐ Offer-specific bonuses
 - ☐ Ready-made resources
 - ☐ Custom affiliate links
 - ☐ Contests and/or rewards
- ☐ I have identified and contacted potential JV affiliates
- ☐ I have sent out interview invitations, and I am tracking these
- ☐ I am focusing on equal promotion for:
 - ☐ Pre-launch
 - ☐ Mid-launch
 - ☐ Post-launch follow-up
- ☐ I have segmented my list to reflect differing subscriber actions
- ☐ I am tracking post and promotion performance, as well as sales
- ☐ I am adjusting promo and sales elements based on performance tracking
- ☐ I have scheduled a post-mortem meeting with my team so we can analyze this campaign, tweak our process, and start moving forward on my next powerful launch

Offer Creation Checklist

Use this checklist to ensure you create the best and most irresistible offer for your perfect paying market.

- ☐ I have determined my own goals and needs in wanting to create this offer
- ☐ I have researched, identified, and verified my ideal customer's strongest current need
- ☐ I have identified my ideal customer's ultimate goal and visualized the steps needed for her upcoming journey
- ☐ I am searching through my existing content for material to repurpose in alignment with my goal and my ideal customer's most urgent need
- ☐ I have identified what is easiest for me to create or put together
- ☐ I have looked at strategies such as product bundling – or splitting apart a larger product to sell in individual lessons, modules, or components
- ☐ I have assessed current resources can leverage, including:
 - ☐ My skills and specialty
 - ☐ Team members' specialties and expertise
 - ☐ Existing original product and content
 - ☐ Technological skills and resources
 - ☐ Timeframe needs and team or contractor availability
 - ☐ Production and promotional costs
 - ☐ Budget limits
- I have decided whether this product needs to be free or paid
- ☐ I have looked for opportunities to maximize profits, including adding;
 - ☐ An OTO
 - ☐ A bump offer
 - ☐ Bonuses that are available only for the duration of the offer to sweeten the pot
- ☐ I have made sure my sales copy includes:
 - ☐ A headline that gives my ideal customer whiplash
 - ☐ A strong hook to make my ideal customer read more
 - ☐ An emphasis on benefits that are sure to have a strong emotional appeal to the right customer
 - ☐ White space to make my sales copy easier to scan and read
 - ☐ Sub-heads to keep interest sustained
 - ☐ Professional, rich graphics that enhance my message
 - ☐ Strong, repeated calls to action (CTAs)
 - ☐ Buy buttons as well as anchor text and links
 - ☐ My CTAs and links repeated throughout the sales copy a minimum of 3 times

Offer Creation Checklist Cont.

- ☐ I have removed all unnecessary links from my sales page and landing page copy
- ☐ I have proofed all copy multiple times, including in:
 - ☐ Posts
 - ☐ Emails
 - ☐ Landing and sales pages
 - ☐ The product copy itself
 - ☐ Cover pages (social and product)
 - ☐ Graphic content with text
- ☐ I have tested each link in multiple browsers and on mobiles
- ☐ I have set up A/B split-testing on elements like headlines, colors, sub-heads, copy, graphics (including Buy buttons) and especially CTAs
- ☐ I have created pre-launch, mid-launch, and post-launch posts and emails
- ☐ I have created surprise bonus teachings and resources to keep my ideal customer active with my product (as well as delighted)
- ☐ I have set up a Help Desk system and FAQ page to deal promptly and positively with customer issues, including:
 - ☐ Delivery and download issues
 - ☐ Tutorial needs
 - ☐ Questions
 - ☐ Refund requests
- ☐ I have ensured I give customers clear and accurate contact instructions and information
- ☐ I have included all legally required notices, terms, and disclaimers on content, as needed
- ☐ I have beta-tested my product and solicited testimonials and success stories
- ☐ I have inserted testimonials where appropriate in my sales copy and emails
- ☐ I have a strong idea of what my ideal customer will need from me next, and I have created a product schedule for the next twelve months

Promotion Schedule Checklist

Use this checklist to keep your promotions on target.

- ☐ I have taken time to identify:
 - ☐ My ideal paying customer
 - ☐ My ideal customer's most urgent market need
- ☐ I have set a specific goal for my promo campaign
 - ☐ Get more sales
 - ☐ Get more subscribers
 - ☐ Target a new segment previously out of reach
 - ☐ Establish a signature product
 - ☐ Boost visibility
 - ☐ Get more shares
 - ☐ _____
- ☐ I have taken time to identify my ideal paying customer
- ☐ I have researched when my active audience is online, and I am paying attention to carefully timing each promo release
- ☐ I have set my pricing and created a promotional budget that allows me to meet my pricing goals
- ☐ I have paid attention to strong branding on this promotion
- ☐ I have identified the most important message this promotion will share
- ☐ I have created a plan for promoting this offer, working backwards from my launch date
- ☐ I have created an email series for this campaign and segmented my list
- ☐ I have narrowed down my social network promotion plan to my most active 1-3 platforms.
- ☐ I am using a mix of post types and monitoring them to see what types my ideal audience prefers - and shares - the most
- ☐ I have set deadlines and assigned specific promo tasks to the most appropriate team members
- ☐ I have considered and approached potential JV partners in advance with a strong, personalized pitch focused on:
 - ☐ The potential JV's specific audience
 - ☐ The potential JV's schedule and priorities
 - ☐ A concrete plan for promoting my potential JV throughout this campaign
 - ☐ A specific plan for follow-up

Promotion Schedule Checklist Cont.

- ☐ I have created a media page or media kit
- ☐ I have carefully considered which strategies would be particularly effective for this campaign:
 - ☐ Livestream or webinar
 - ☐ Press releases
 - ☐ Interviews
 - ☐ Advertising
 - ☐ A contest
 - ☐ Blog posts
 - ☐ Social posts
 - ☐ Affiliate promotion
 - ☐ _____
- ☐ I have set up metrics and tracking for this promotional campaign
- ☐ I am keeping my promotion campaign as simple and focused as possible.

Social Strategy Checklist

Use this checklist to make sure you set the best social media promotional strategy possible.

- ☐ I have identified my most active social networks
- ☐ I have decided to focus my attention on no more than 3 of the following platforms:
 - ☐ Facebook
 - ☐ Instagram
 - ☐ Twitter
 - ☐ TikTok
 - ☐ Pinterest
 - ☐ YouTube
 - ☐ LinkedIn
 - ☐ _____
- ☐ I have selected the best mix of post types for each network:
 - ☐ Video posts
 - ☐ Questions
 - ☐ Polls
 - ☐ Process peeks
 - ☐ Advance product peeks
 - ☐ Livestreams
 - ☐ Teaser posts
 - ☐ Infographics
 - ☐ Image quotes
 - ☐ Quotes without an image background
 - ☐ Recurring feature posts (e.g., "Feedback Friday, Teaser Tuesday")
 - ☐ Group Q&A
 - ☐ Contests
 - ☐ Ads
- ☐ I have created strong social media branding through the use of:
 - ☐ Campaign cover photos tweaked to fit each platform's latest guidelines and specifications
 - ☐ My brand colors
 - ☐ Post and image mood and tone
 - ☐ My messaging

Social Strategy Checklist Cont.

- ☐ I have created social media templates for better consistency, stronger branding, and a more professional, polished look across all my social networks
- ☐ I have ensured I follow the latest guidelines and specs for all image sizes in my various social networks and their feature pages
- ☐ I have invested in CMS software to assist with automatic formatting and post uploading for each specific network
- ☐ I have created a posting schedule based on the most active time of day/day of the week for my ideal audience
- ☐ I have scheduled myself or my trusted assistant to monitor my social networks and answer/acknowledge comments
- ☐ I am cross-promoting with email and blog posts
- ☐ I have identified keywords my ideal follower looks for, and I'm using these in posts
- ☐ I regularly conclude with CTAs in every post
- ☐ I am tracking all aspects of my social media campaign and making notes
- ☐ I am doing more of what works and less of what garners little reaction or interaction
- ☐ I am regularly interacting with my social media community