



Your Sales & Marketing Checklist Create Predictable, Prosperous Results by Following the Formula!

Begin by determining the length of time necessary for your marketing and sales activities to fill your program based upon:

$$\frac{\text{The number of people you want in your program}}{\div (\text{divided by})} \\ \text{Closing Ratio (20\%)} = \text{Number of People to PRESENT To}$$

PRESENT = Actual conversations, either 1:1 or through group presentations with a direct call to action to the sales page or to a 1:1 call with you. Emailing your list and sending them to the sales page is not considered a presentation.

Goal # People	Divided By	Closing Ratio	Equals	# of People to Present To
10	÷	20% (.2)	=	50
25	÷	20% (.2)	=	125
50	÷	20% (.2)	=	250
100	÷	20% (.2)	=	500
250	÷	20% (.2)	=	1250

Note: The closing ratio of 20% is used as an average for calculation purposes, your closing ratio may differ depending on a variety of factors, such as:

- You'll have higher closing ratios through 1:1 enrollment conversations
- Webinars and tele-classes may have lower than 20% conversion (and follow up calls to non-buyer are recommended).

Here is an example of a 4-week marketing cycle with the goal of enrolling 10 people in your program.

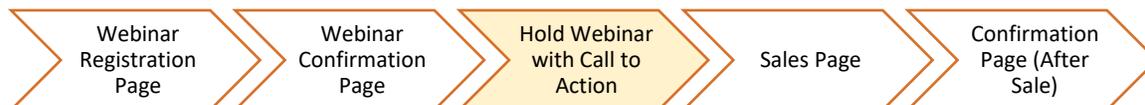
Note: the same formula applies if you would like to enroll 10 new one-on-one clients!

When	What	#People Reached	# Enrolled
Week 1	Phone Calls	5 (x 20%)	1
Week 2	Webinar	30 (x 20%)	6
Week 3	Phone Calls (Webinar Follow Ups)	10 (x 20%)	2
Week 4	Phone Calls (both)	5 (x 20%)	1
Start Date		50 (x 20%)	Total 10

You Can Do This!

Next, Let's Get Ready to Serve & Be Prepared to Receive

Website Pages	
	Webinar Registration Page Your free or low-cost presentation to invite them into the program
	Webinar Registration Confirmation Page Provides details of zoom link (or other platform event will be held on)
	Webinar Replay Page (used AFTER hosting webinar) This will contain the replay of the Webinar with a link to the sales page (your call to action) under the video
	Sales Page Where they will sign up for your program (or a 1:1 conversation with you to explore working with you further)
	Confirmation (Thank You) Page with Program/Course Information This will be either a website page or a membership portal if you are using a membership platform for your program.



Email Sequences

Note: During the timeframe for email marketing you will also want to promote the Webinar on social media to drive additional registrations.

Marketing the Webinar:

- Select a date 1 to 2 weeks out to provide ample time for marketing and registration.
- If possible, segment your email list when sending above to exclude people who have already registered for the webinar
 - Day 1 – Email #1
 - Day 4 – Email #2
 - Day 8 – Include in Newsletter if you have one
 - Day 10 – Email #3
 - Day 12 – Email #4
 - Day 14 (6am) – Email #5 – Last Chance to Register

Confirming & Reminding Webinar Registrants

- Email #1 – Upon Registration
- Email #2 – 4 days before Webinar
- Email #3 – 1 day before Webinar
- Email #4 – 30 Minutes before webinar

Note: All the emails (EXCEPT the one 30 minutes before) will give link direct to the Webinar Confirmation Page

The Email sent 30 minutes prior gives direct link to zoom (or other webinar platform).

Webinar Registration (Promotion)

- Day 1 – Email #1
- Day 4 – Email #2
- Day 8 – Include in Newsletter if you have one
- Day 10 – Email #3
- Day 12 – Email #4
- Day 14 (6am) – Email #5 – Last Chance to Register

Webinar Confirmation (Reminders)

- #1 Upon Registration
- #2 - 4 Days before
- #3 - 1 day before
- #4 - 30 minutes before

After Webinar Action Items – Email Sequences

- For Webinar Attendees
 - Within 24 Hours - Email #1 with link to page that includes the Replay with link to sales page (call to action) under the video
 - 24 Hours Later – Email #2 same as above
 - Variable – If you have a closing date for enrollment in course, you will want to send additional emails as the closing date approaches
- For NON-Attendees
 - Within 24 Hours – Email #1 slightly different messaging (since they missed the webinar). Also include link to replay page as instructed above)
 - 24 Hours Later – Email #2 same as above
 - Variable – If you have a closing date for enrollment in course, you will want to send additional emails as the closing date approaches
- For Your Entire List (except those who came to the webinar or who have already enrolled in your course)
 - Direct email invitation with link to Sales Page
 - Depending on time frame for course beginning the number of emails and frequency will vary
 - Depending on the sales price of the program (especially if it is over \$500), you may want to revise the call to action in the email to have them call you (or schedule an appointment with you).
 - Always include in your email campaign sequence
 - Announcement – Enrollment Now Open (and specify in email when it closes as well as any other bonuses that may be disappearing)
 - 2 Days Before Enrollment Ends – Email
 - 1 Day Before Enrollment Ends – Last Chance or Doors Closing

After Webinar Action Items – Phone Calls

- Follow up calls to Webinar attendees (non-buyers).
- Note: be prepared to have down sell and up sell invitations ready. Just because they didn't buy your program on the webinar doesn't mean they don't want to do business with you. ASSUME they do want to do business with you, the group program you offered just wasn't the right fit (maybe they want more of you than just group, maybe they need a lower priced offer. You will only find this out by SPEAKING with them directly.

Email Sequences – After Purchase

The example below is if you are offering a group program (such as a 6-week course).

- If your course or program is not starting for a couple of months, you will want to include interim email reminders to ensure they have put the information in their calendar. For example, if they purchased 3 months (12 weeks) before program starts, you would want to include the following email sequence leading up to the start of the program:
 - Upon Registration
 - 3 Weeks Later
 - 3 Weeks After That
 - 3 Weeks After That
 - 1 Week After That (2 weeks before course begins)
 - 1 Week After That (1 week before course begins)
 - 3 Days Before Course Begins
 - Morning of Course Beginning
 - 30 Minutes Prior to Course Beginning
- If your course or program is starting in 3 weeks or less from the time of purchase (some people WILL enroll the night before you begin), follow the below timetable:
 - Upon Registration
 - 1 Week After That (2 weeks before course begins)
 - 1 Week After That (1 week before course begins)
 - 3 Days Before Course Begins
 - Morning of Course Beginning
 - 30 Minutes Prior to Course Beginning
- AFTER the first class
 - Within 24-48 hours, send email with replays (or reminder to access replay inside of membership portal). Include any additional worksheets or handouts referenced
- For subsequent weekly classes
 - Email reminder the day before
 - Email reminder "We're getting started" 30 minutes before