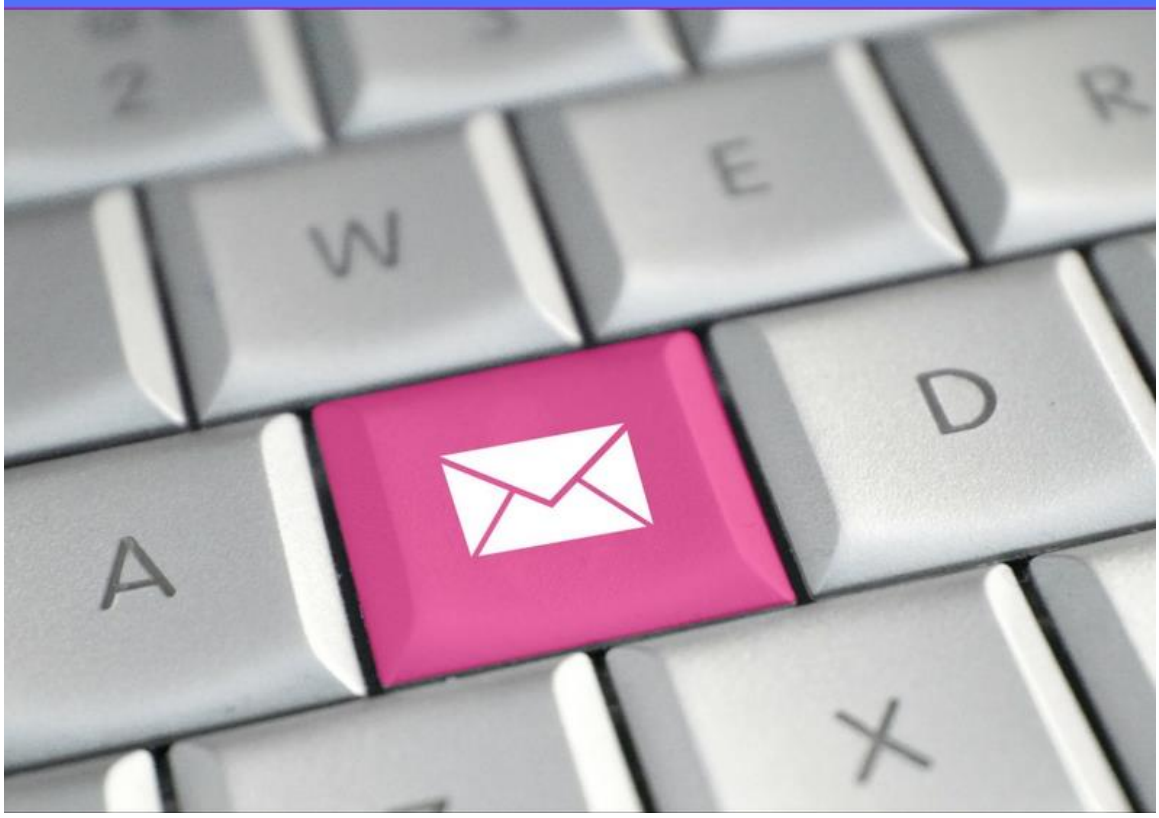
EMAIL FOLLOW-UP PLANNER:

TURN YOUR NEW LEADS INTO CUSTOMERS IN 7 DAYS



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Ask any successful business owner and they'll tell you, the faster you can move a potential client from the "prospect" side of the ledger to the "buyer" side, the higher your profit margins will be. That's why millions of pounds and dollars have been spent studying marketing strategies, client onboarding methods, follow-up contact, and more.

As an online entrepreneur, you have the same powerful tools at your disposal that much larger companies enjoy, but if you're not taking the best advantage of them, you're leaving money on the table.

The most powerful of these tools? Your email follow-up sequence. While the "know, like and trust" factor is important when it comes to making sales, it's also worth remembering that new subscribers are highly likely to take action. Even if they've only just met you, a well-designed follow-up sequence can quickly:

- Establish you as the leader in your market
- Provide proof of concept
- Solidify that "know, like and trust" element
- Turn browsers into buyers

The key is to present an irresistible flow that leads naturally from one step to the next, making each offer along the way—whether free or paid—a "no brainer" your reader would never consider rejecting. In fact, they'll anxiously await your next email (and the next, and the next) and happily fill their virtual cart with your latest products and services.

And all because you've designed an email follow-up they'd be foolish to ignore.

STEP ONE: DEFINE YOUR DREAM CLIENT

Before you can design a follow-up sequence that compels readers to take action, you have to know exactly who those readers are.

As a business owner, you no doubt have a clear idea who your dream client is. But are your initial offer and subsequent follow-up messages in line with that ideal? Many times they're not, and that can cause your funnel to fall apart before you even get a chance to know your subscribers better—or them you.

Your initial offer should flow naturally into your first email follow-up, which presents the next logical step for readers to take. At each step (or email) along the way, the next logical move—whether to download a checklist, join a private Facebook group, or

purchase a product—is a clear "no brainer." And this entire sequence is designed to appeal to the person who most needs and wants the information you have to offer.

When you think about your dream client, there are several key pieces to consider:

- **Their current business or life goals.** Are they a brand new business owner or savvy, 7-figure entrepreneur? You likely will not resonate with both (no one can) so if your focus is on beginners, it makes no sense to create offers designed to appeal to more established business owners.
- **Their financial status.** Can they afford your services and products? This is especially important if your dream client is just starting out.
- **Their location.** Even if you're doing business online, location can be important. This is very true if you host local Meetups or retreats.
- **Their drive.** Will they happily and willingly take the actions required to move to the next step? Do they truly want the goal they've set for themselves, or are they just a tire kicker who likes the idea of reaching the goal, but who is unwilling to do the work?

Throughout the course of your career, your dream client avatar will evolve. You may move from working with beginners to a more intermediate client. You may narrow or change your focus. You may even discover that the person you thought was your dream client is actually not a good fit for you personality wise.

For all of these reasons and more, it's a good idea to revisit your dream client avatar from time to time, and most definitely before you go to the time and trouble to set up a whole new funnel. So let's rediscover your dream client here before we get started.

***Exercise**: Define Your Dream Client*

STEP TWO: KNOW YOUR FOLLOW-UP GOAL

You will very likely have many follow-up sequences in your business. While you have a larger, overarching funnel with a clear goal (perhaps a VIP day or exclusive retreat), each follow-up series will have its own smaller goal as well, with each one designed to move subscribers deeper into your funnel.

For example, you may offer a free webinar training to show attendees the power of blogging for business. After the webinar, you'll reach out with a series of five or seven emails which:

- Restate the importance of blogging
- Provide proof of concept through case studies
- Offer tips and strategies not covered during the webinar
- Give links to supporting documents and additional resources

Finally, you'll offer your paid blogging program, which subscribers can purchase at a discount if they do so within a set period of time.

In this example, the paid blogging training is the goal for this follow-up sequence, but not your big, end-of-funnel goal. It's merely one step along the path to that VIP program, retreat, or high-end private coaching program.

***Exercise**: Determine Your Goal*

The primary offer for my dream client is:

_____

This offer is perfect for them because it will…

_____

_____

_____

STEP THREE: OPT-IN INCENTIVES—GIVING YOUR DREAM CLIENT WHAT THEY WANT & NEED

Asking readers to allow you into their inbox requires an incentive worthy of their trust. Gone are the days when you could simply say, "Get our weekly newsletter," and have a flood of subscribers. Today's customers are much more discerning, and with overflowing inboxes (more on that in step 6) a problem for all, it's more important than ever to create an offer that readers simply cannot refuse.

But don't think you have to go all out and write a 300-page eBook or provide a 6-module course as your opt-in incentive. Quite the contrary, today's subscribers are in a hurry, and are often much more likely to need (and use) a simple checklist, worksheet, or resource guide. While that 300-page eBook might sit unread and unused on their hard drive, a checklist your subscriber can turn to again and again will often be seen as much more valuable.

You probably already know exactly what your dream client wants and needs—even if you don't recognize it quite yet. Think about:

- **The most commonly asked questions in your help desk.** If you're continually fielding questions about the tools you use to run your business or which of your training programs are best for a beginner, then it's easy to see that a resource guide would be well received.
- **Frequent thread topics in your Facebook groups or niche forums.** Chances are you'll see the same questions pop up again and again. For example, if your clients are virtual assistants, you know that just about every day someone asks, "Where can I find my first client?" A one-page, "How to land your first client" guide is the perfect incentive for this market.
- **Client surveys you've conducted.** If you've been in business for a while, you've most likely used this tool to find out more about your potential customers. Take the opportunity to read through the responses and see:
    - **What is the most pressing problem your market faces?**
    - What language do they use to describe the issues they face?
    - Which resources would make it easy for them to move to the next level in business or in life?
- **Competitor's offers.** Take a look at what other business owners offer, but rather than aiming to duplicate their efforts, ask yourself where the gaps are in information, and how you can fill those holes.

You don't have to create something from scratch either. You can design a new opt-in incentive quickly by repurposing other content. For example:

- Repackage a free webinar & worksheet
- Compile a series of blog posts into a PDF
- Brand and package the checklists and worksheets you use in your own business
- Offer a free chapter of your latest book

***Exercise**: Create Your Opt-In Incentive*

Using the ideas here, decide what offer is likely to be most compelling (and useful) to your dream client.

My opt-in offer to my dream client is:

_____

They have a pressing need for this because:

_____

STEP FOUR: MAP YOUR FUNNEL

We already know what the goal of your follow-up sequence is; now it's time to create the step-by-step process that will effortlessly lead your subscriber down the path to the goal.

Each email in your sequence will build on the previous, providing another piece of information and more resources your reader can use. This serves several purposes:

- Help your subscriber to achieve their goals
- Clearly establish your expertise in the niche (so you become the go-to expert)
- "Train" your subscribers to open their email (because the information is so valuable to them)

Think of it like teaching a middle-school math class. You cannot expect your class members to easily grasp algebra if they don't yet know how to add and subtract. You must give them the prerequisites first, before asking them to move to higher-level subjects.

Figure out what those prerequisites are, and in what order they should be learned, and you'll be well on your way to creating a well-planned and highly profitable follow-up sequence.

Exercise*: Plan Your Follow-Up Sequence*

Start with your initial download/welcome message, and then decide what subscribers will want/need to know next, and how the information should logically flow to be of the most benefit to them. You can also use the templates at the end of this workbook to plan your entire email series.

Email	Learning Objective	Next Step
1		
2		
3		
4		
5		
6		
7		

STEP FIVE: STRIKING THE RIGHT BALANCE BETWEEN INFORMATION AND OFFERS

If you want to be known as the go-to expert in your niche, you must provide rock-solid information that is of value to your subscribers.

But if all you offer is information, your first email containing an offer will be met with incredulous glares and an astounding unsubscribe rate.

The fact is, you must "train" your subscribers to expect—and even appreciate—periodic offers. Savvy readers understand that the best information comes with a price tag, but if you establish a pattern of all information, all the time, they'll begin to think this is the norm for your list, and will vehemently oppose any offer, regardless of how useful it might be.

With that said, though, you must be careful not to go too far in the other direction, either. Offer after offer after offer will quickly burn out your list, and result in a higher than usual unsubscribe rate.

The secret? Striking the perfect balance—for your subscriber base—between offers and information. Some markets will happily accept a higher percentage of offers when compared to information, while others will resist every attempt to "sell them"

something. You very likely have a good feel for what the balance needs to be for your list, but if not, this is something you can test along the way (see step 9).

***Exercise**: Give Them Good Info*

Brainstorm tips, strategies and stats your readers need to have throughout your follow-up sequence. Start with the questions they're likely to have as they read each email, then determine if the answer can be conveyed in an email, or if it requires something larger—such as your paid product or service.

(Hint: If every question requires a paid product to answer, chances are your follow-up sequence is too broad. Consider narrowing your topic before continuing.)

Pressing Need/Question	Solution

STEP SIX: OPEN UP—HOW TO WRITE CLICKWORTHY SUBJECT LINES

Getting your emails opened is the biggest hurdle you'll face with your follow-up sequence. Our email inboxes are filled to overflowing, with some studies claiming that the average adult received 147 emails per day! And truthfully, that number is probably even higher for those in business or who want to be.

Not only that, but email systems such as Gmail now helpfully filter incoming mail into buckets or folders, so users can quickly see which emails are promotional and which (presumably) they really want to read. As you can imagine, this type of auto-filtering can make it super tough to get the attention of your subscribers.

Even though they've asked to receive your emails, the combination of filtering, over-zealous spam controls, and an overflowing inbox means your subscriber won't always see your email. And if they do, there's no guarantee they'll open it.

But you can tip the odds in your favour by:

- Avoiding spammy words and phrases such as "free" or "$$$" and excessive exclamation marks
- Using a reputable email management system with good deliverability rates
- Keeping it short. Ideal subject lines have fewer than 60 characters.

Beyond that, though, you have to actually create intriguing headlines that your reader simply cannot resist. Here's some ideas you can use:

- Ask a question ("Which email provider performed the best?")
- Personalize your subject with a first name ("Hey Susie, did you grab this yet?")
- Leave them hanging ("This is my best tip for better branding")
- Make it time-sensitive ("Ends Thursday: 50% off on all my social media courses")
- Use multi-media ("How I organized my office in an afternoon – before and after pics inside!")
- Make it a list ("3 ways to land your first client this week")
- Use a direct call to action ("Register today")

Creating great subject lines takes practice, and it's one of the things we'll test and tweak in Step Nine, but for now, keeping these tips in mind, and creating a swipe file will help get you in the habit of crafting click-worthy subject lines.

***Exercise**: Create a Swipe File*

A swipe file is simply a collection of content—in this case, email subject lines—that inspire you in some way. Copywriters and others have used this technique for decades to avoid writers block, and to create better sales copy, calls to action, and yes, even subject lines.

So while you're reading your email every day, don't just hit delete. Read the subjects. Which ones work for you? Which ones make you want to click? Start a list, and turn to that when you're writing your own subject lines.

Headlines/Subjects That Made Me Click

STEP SEVEN: CRAFTING COMPELLING CALLS TO ACTION

While we've already established that not every email should contain an offer, each email definitely must have a call to action. Never leave your readers without something to do "next."

Calls to action should be:

- **Clear**. This is not the time to be subtle. Tell your reader exactly what they should do.
    - Watch the video.
    - Download the checklist.
    - Join the Facebook group.
    - Register for the training.
- **Benefit driven**. Why should they do this thing? What's in it for they?
    - Watch the video to learn the design secrets that will save you time.
    - Download the checklist to learn the exact strategy I'm using.
    - Join the Facebook group and get your questions answered.
    - Register for the training for easy-to-follow, step-by-step advice.

- **Limited**. Too many calls to action will confuse your reader, and a confused reader will do nothing. Ideally, you should have a single call to action per email. Two calls to action are acceptable if they are both free offers. If you're presenting a paid offer, it should be the only call to action.

***Exercise**: Create Your Email Calls to Action*

Offer	Call to Action

STEP EIGHT: PUT YOUR EMAIL CAMPAIGNS ON AUTOPILOT

The beauty of a follow-up email sequence is that it works even when you aren't. Unlike sending broadcast emails (which you have to log in and send) a follow-up sequence goes out on a schedule that you've pre-determined.

Not only that, but while a broadcast email only goes out to those who are on your subscriber list at the time you send the email, your follow-ups go to everyone who subscribes. That means that more people are seeing your best emails and offers over a longer period of time. That gives you the opportunity to:

- Create a recurring stream of income by offering products, services, and even affiliate programs consistently, and to everyone who subscribes to your list.
- Offer better support to your potential and future clients by providing them with exactly what they need at the right point in their journey with you.

The key to this lies in smart automation. You want to be sure you're offering the next logical product based on where your customer is in the funnel, and you need to ensure you're not continuing to offer a product they've already purchased.

Most email systems today allow you to tag and move subscribers from one campaign to another based on their behavior. However, it takes a bit of forethought and planning to ensure the flow is natural and that your subscribers don't accidentally receive random, unexpected messages.

Here's an example from CoachGlue.com. You can see that once a new subscriber signs up, they're immediately funneled into one of two sequences. Existing customers are sent down a different path than those who are new.

***Exercise**: Plan Out Your Automation*

Whichever email system you're using, spend some time mapping out exactly what will happen to subscribers as they move through your funnel.

If a Subscriber Does This…	Then This Should Happen Next

STEP NINE: TEST, TRACK, TWEAK & IMPROVE

Completing your follow-up emails is not the end of this project. Instead, it's really just the beginning.

Savvy marketers know that consistent business growth (and the higher profits that come with it) requires continual testing, tracking and tweaking. Virtually everything can be tested, but some of the most common are:

- Squeeze page headlines
- Calls to action
- Email subject lines
- Email send days/times
- Email offers/calls to action

You can set up split testing of your opt-in page using your page builder (LeadPages does a fabulous job of split testing designs) or using Google Webmaster Tools. You can split test subject lines and other email elements directly from most email management systems.

If your system does not allow for split testing, you can still test the overall effectiveness of follow-up emails by changing a single element (such as the subject line) after XX number of subscribers have already received the email. Compare your open rates prior to the change to those after the change to determine if the move was beneficial or not.

But before you do any of that, it's a good idea to get some baseline numbers, so you'll know where you stand at the beginning.

***Exercise**: Track Your Numbers*

Email	Open Rate	Click Rate	Conversions	Unsubscribes
1a				
1b				
2a				
2b				
3a				
3b				
4a				
4b				
5a				
5b				
6a				
6b				
7a				
7b				

EMAIL PLANNING TEMPLATES

Email #1

Topic (what is the email about?):

_____

Subject Line:

_____

Email Outline:

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Call to Action:

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Email #2

Topic (what is the email about?):

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Subject Line:

_____

Email Outline:

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Call to Action:

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Email #3

Topic (what is the email about?):

_____

Subject Line:

_____

Email Outline:

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Call to Action:

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Email #4

Topic (what is the email about?):

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Subject Line:

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Email Outline:

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Call to Action:

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Email #5

Topic (what is the email about?):

_____

Subject Line:

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Email Outline:

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Call to Action:

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Email #6

Topic (what is the email about?):

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Subject Line:

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Email Outline:

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Call to Action:

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Email #7

Topic (what is the email about?):

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Subject Line:

_____

Email Outline:

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Call to Action:

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