ASCEND

This Book Belongs to:

Business Name:

Your Name:

Cell Phone (in case you lose your book):

Program Schedule

Please plan to be on time and attend each and every session

Duration and timing of each day is subject to change based on what would serve participants best as each day unfolds.

Day 1

- [ ] Event Begins: 9:00 AM
- [ ] Lunch: around 12:30 PM
- [ ] Regular Session Ends: 5:30 PM
- [ ] **Networking Happy Hour: 5:45 PM – 8:00 PM**

Day 2

- [ ] Be in the room by 8:50 AM
- [ ] First Session Begins: 9:00 AM
- [ ] Lunch: around 12:30 PM
- [ ] Regular Session Ends: 5:30 PM
- [ ] Dinner Break: 5:30 – 7:00 PM
- [ ] **SPECIAL BONUS SESSION: 7:00 PM – 9:00 PM**
  Not to be missed! (includes premium systems training, breakthrough coaching, hot seats and more)

Day 3

- [ ] Be in the room by 8:50 AM
- [ ] First Session Begins: 9:00 AM
- [ ] Lunch: around 12:30 PM
- [ ] Regular Session Ends: 5:30 PM
- [ ] Your Next Chapter Begins!

Intention for Today at ASCEND

Welcome

Let me start by saying how excited I am to spend the next 3 days with you!

My team and I have been working very hard to ensure that you will look back on Ascend, and consider it one of the very best investments you've made in yourself and your business.

And make no mistake. These 3 days are about the NEXT LEVEL. You're here because you're looking to improve, you're looking to grow, you're looking for change, transformation…the NEXT LEVEL.

Getting to the next level is going to take work. And it's not guaranteed, nor is it deserved. Each of us has to make it happen and chart our own path. The universe won't hand it to you. We're going to show you the systems and strategies that can get you there. If you're willing to do the work, and apply the right systems for your business, your path is in front of you.

It's up to you to implement them, benefit from them, and take your business to the next level.

You're here, so I know you're all in. And my team and I, we're here to support you.

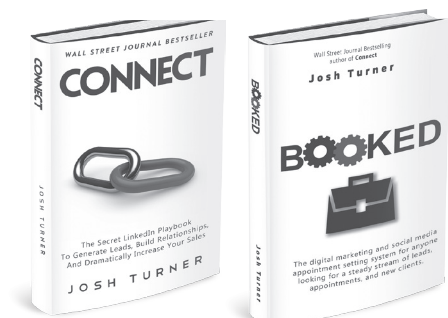
Over these next 3 days, I'm going to show you the systems I've used to grow from nothing to multiple seven figures in just a few years. The last 3 years, we've TRIPLED our growth every year. That's 27X growth! And we're going to do it again this year.

What we've accomplished is unique, but it's not because I'm special or different. I simply had the tenacity to implement the systems. To continue putting in the work. And it's now afforded me so many amazing opportunities. I know that these same processes are repeatable, and if you want to get to your next level, there is a clear path to getting there. Over the next 3 days, we're going to work hand in hand, to create your 27X roadmap.

And above all else, together we can make some big waves and help a lot of people.

I'm grateful to be on this journey with you!

Josh Turner
Founder & CEO, LinkedSelling



Here's Exactly What You **Will** Get

You will walk away...

- ☐ With a customized roadmap.
- ☐ FIRED UP for the future of your business.
- ☐ Committed to doing what it takes.
- ☐ Having access to every resource you need.
- ☐ Knowing that success is not about luck. It's about systems.
- ☐ Knowing that creating your results is all about your input.

Here's Exactly What You **WON'T** Get

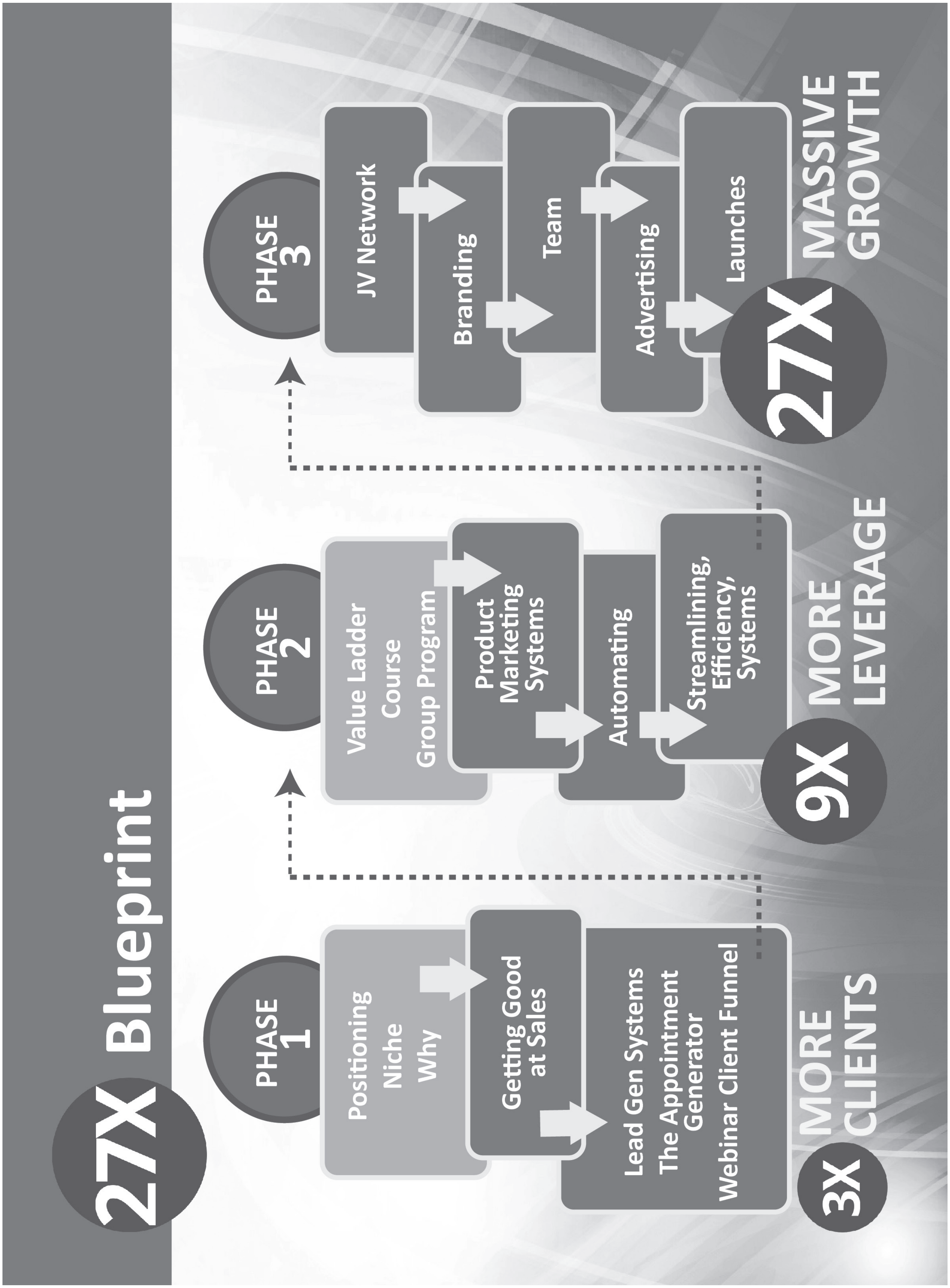
You will NOT...

- ☐ Get a love fest.
- ☐ Get boring vanilla business ideas.
- ☐ Be able to hide behind "I'm not good at it" or "I don't like sales" or "I'm not good at numbers"
- ☐ Be comfortable.
- ☐ Be forced to achieve growth.
- ☐ Be talked to like you're a newbie.
- ☐ Get a magic push button solution.

Why ASCEND?

I wanted a venue to work with business owners to....

- ☐ Spend 3 days working ON your business.
- ☐ Show you the 27X Blueprint, and the repeatable systems I've designed to 3X my business every year for the last 3 (going on 4) years.
- ☐ Share the principles that work every time (and the ones that don't).
- ☐ Give you a roadmap to create lasting growth in your business.
- ☐ See behind the curtain.
- ☐ Show you exactly:
    - How I've done it.
    - How many of our clients have done it.
    - And how you can do it too.


27X Blueprint
PHASE 1
Positioning
Niche
Why
Getting Good at Sales
Lead Gen Systems
The Appointment Generator
Webinar Client Funnel
3X MORE CLIENTS
PHASE 2
Value Ladder
Course
Group Program
Product
Marketing
Systems
Automating
Streamlining,
Efficiency,
Systems
9X MORE LEVERAGE
PHASE 3
JV Network
Branding
Team
Advertising
Launches
27X MASSIVE GROWTH

Mike Mertz

Owner, Mertz International

I'm a US Tax Consultant doing business in Asia. After about two years in business is when I met and ran into Josh. As soon as I saw what he was doing, I immediately wanted to sign up because intuitively it made sense to me that I need a marketing system that would bring prospects in and make them a client.

Josh's team was able to help me avoid some pitfalls because they knew what type of messages they're going to send, they know the content, they have an entire system.

The biggest benefit I saw is the increase in revenue. They've kicked my revenue to double of what it was, and it continues to double every year now. This year before tax season, I've got thousands of people we've been nurturing all year. We're about ready to ask for their business, and I only need 300 to 400 of them to make my business just explode.

The experience of working with Josh's team has made me feel really good. They're very professional, they've helped me a lot, and they taught me a lot about this system.

When you consider working with Josh, I think you should absolutely give a 12 months. It's a great investment. There's no way you won't get any clients, and those clients you get are for sure going to more than pay for the fee. And at the end of 12 months you can look back and say "did the clients I got pay more than the fee and do I have extra money in my pocket because of what Josh did?" I think you'll be pretty happy with the result.

Your WHY

What do you want to change in the world?

____

____

____

What gets you fired up, gets you upset, or breaks your heart?

____

____

____

How do you want to help people?

____

____

____

What are the top 3 reasons you are in business?

1. ____

2. ____

3. ____

Why is it important that you work with your clients?

____

____

____

Why is it important for them to work with you?

____

____

____

What is your big WHY?

____

____

____

Close your eyes, and picture someone you love.

See their face.

What do you wish for them?

Clearly Identifying Your Niche and Target Market

Having a clear niche is powerful in so many ways. If you are just another me-too player in your industry...growth is difficult. Instead, you need to carve out a niche that you can dominate. No matter what space you are in, it can be done.

Positioning is the real estate you occupy in the mind of your prospect. We'll work on that this week too. Niche is a bit more specific. Niche refers to the vertical, industry or type of person your serve.

Consider the following questions, and spend some time with them:

- ☐ Who are your best clients?
- ☐ What does your dream client look like?
- ☐ Look at your past clients. What common thread runs throughout? Or, what kind of concentration exists? Which ones do you LOVE working with and know you can REALLY help the most?
- ☐ What industry experience do you have? What kind of niche do your credentials support?
- ☐ What services do you offer that are unique and don't have much competition?

A few examples...

- ☐ You can be the leading financial advisor for women in Denver.
- ☐ You can be the commercial insurance broker that specializes in working with small breweries.
- ☐ You can be the personal trainer that specializes in helping fathers lose that flabby dad bod.
- ☐ You can be the copywriter that works only with high tech startups in the energy space.
- ☐ You can be the life coach that helps twenty somethings who are devastated by investing in a degree for a field that they now have no interest in pursuing a career in.
- ☐ You can be the marketing consultant that specializes in helping higher education administrators to dramatically increase alumni engagement.

Notes and Big Ideas

After working through the above questions and analysis, write a description of your niche and target market here.

The Power of Relationships

Write down these three things:

1. Something personal:

____

____

2. Something about your business:

____

____

3. A hurdle or challenge you would like to overcome in the next year:

____

____

Then turn to a person close by, introduce yourself and share what you wrote down. Also write down the answers of the person you partner with for the exercise.

____

____

____

____

The number 1 key to growing your business is:

____

Relationship should be the focus of all of your marketing and sales efforts.

Taking your relationships to the next level, whether it be with new existing customers, new customers, or prospects, will increase your business dramatically overnight. The ability to create these relationships is an important skill to hone.

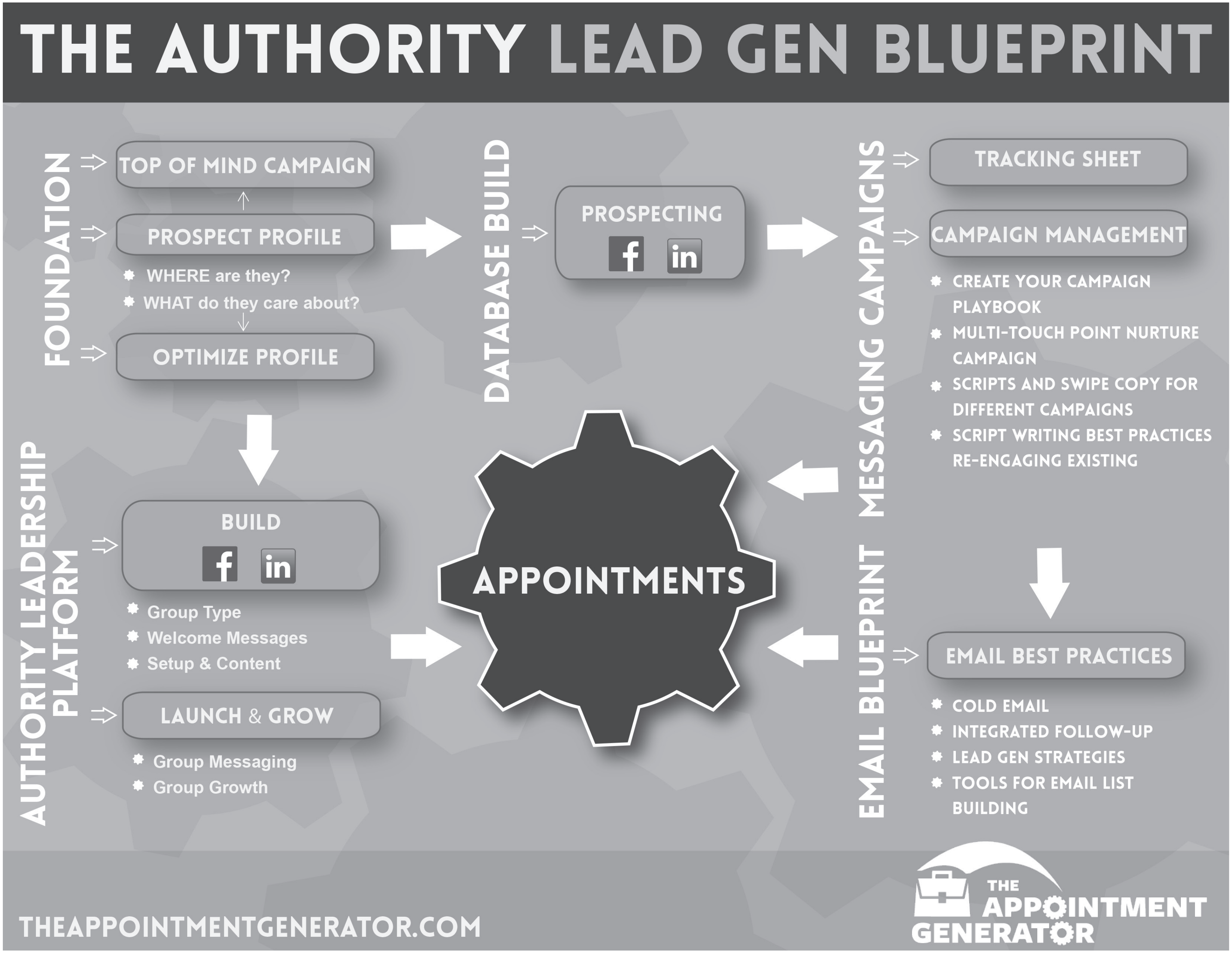
Relationships can be ________________________________ and

__________________________________ systematically.

How can this be done?

____

____


THE AUTHORITY LEAD GEN BLUEPRINT
FOUNDATION
TOP OF MIND CAMPAIGN
PROSPECT PROFILE
WHERE are they?
WHAT do they care about?
OPTIMIZE PROFILE
DATABASE BUILD
PROSPECTING
MESSAGING CAMPAIGNS
TRACKING SHEET
CAMPAIGN MANAGEMENT
CREATE YOUR CAMPAIGN PLAYBOOK
MULTI-TOUCH POINT NURTURE CAMPAIGN
SCRIPTS AND SWIPE COPY FOR DIFFERENT CAMPAIGNS
SCRIPT WRITING BEST PRACTICES RE-ENGAGING EXISTING
AUTHORITY LEADERSHIP PLATFORM
BUILD
Group Type
Welcome Messages
Setup & Content
LAUNCH & GROW
Group Messaging
Group Growth
APPOINTMENTS
EMAIL BLUEPRINT
EMAIL BEST PRACTICES
COLD EMAIL
INTEGRATED FOLLOW-UP
LEAD GEN STRATEGIES
TOOLS FOR EMAIL LIST BUILDING
THEAPPOINTMENTGENERATOR.COM
THE APPOINTMENT GENERATOR

The Appointment Generator 6 Core Components

1. The Foundation
2. Authority Leadership Platform
3. Prospecting & Database Building
4. Your Messaging Machine
5. Email Lead Gen Blueprint
6. System

These core components were derived from a higher level of lead gen theory. This theory is not just something that works for TAG but for ALL lead gen systems.

Prospect Profile Development

Demographics vs. Psychographics

The ability to create a prospect profile is essential when it comes to the art of generating appointments for you and your business. Having a true understanding of the details surrounding your prospects is the first step to achieving success with this process.

The two key areas to profiling are: **Demographics** and **Psychographics**.

Demographics are the quantifiable characteristics that describe your prospects. Examples can include things like:

1. Geography
2. Industry
3. Title
4. Age
5. Company Size

Psychographics are the characteristics that describe how your prospects think and feel. Examples can include things like:

1. Interests
2. Personality
3. Opinions
4. Attitudes
5. Lifestyle

The combination of these two areas are what give us a clear understanding of the prospect profile. Being able to profile your prospect in this manner will lay the foundation for you to craft a campaign that focuses not on you and your business but your prospect and their business.

Some profiles may only be made up of only demographics, some may only be psychographics and some may be a combination of both.

Prospect Profile

Fill out the profile below to the fullest of your ability and tailor the categories as needed to fit your prospect.

Describe what types of people are you interested in targeting:

____

____

____

Keywords and industry terms they Identify with:

____

____

____

Professional Interests:

____

____

____

Describe the pain points of your prospect:

____

____

____

Is it important for you to know how your prospect thinks and feels and if so what are the details surrounding those feelings:

____

____

____

Specific industries to target:

____

____

____

THE APPOINTMENT GENERATOR

Prospect Profile, continued

Geography to target: (zip codes, metropolitan areas, counties etc.)

____

____

____

Size of target companies?
Low end? High end?
(based on employee size)

- ☐ 1-10
- ☐ 11-50
- ☐ 51-200
- ☐ 201-500
- ☐ 501-1000
- ☐ 1001-5000
- ☐ 5001-10000
- ☐ 100000+

Company Revenue

- ☐ $0-1M
- ☐ $1-10M
- ☐ $10-50M
- ☐ $50-100M
- ☐ $100-250M
- ☐ $250-500M
- ☐ $500-1B
- ☐ >$1B

Department

- ☐ Sales
- ☐ Marketing
- ☐ Finance
- ☐ HR
- ☐ Operations
- ☐ IT
- ☐ Other

Titles/positions
(ex. Owner, CFO,
Director of Operations, etc.)

- ☐ Manager
- ☐ Owner
- ☐ Partner
- ☐ CXO
- ☐ VP
- ☐ Director
- ☐ Senior
- ☐ Other – (Include any other specific titles of importance to target)

Specific companies to target?

- ☐
- ☐
- ☐

Prospect Map

Where Do Your Prospects Hangout?

How to find the best online communities that house your prospects

Harnessing the power of online communities is a powerful part of the Appointment Generator system. To harness this power you first must determine what social media platform is right for you and your business.

From there you need to focus on joining 30-50 communities. The benefits from this include:

1. Creating a direct link between you and your prospects
2. Gaining insight into the topics and interests that they care about most
3. The ability to interact with your prospects in a meaningful and conversational way
4. Positioning your online profile to become even more enticing to the prospects you are targeting

How do I know what platform to focus on?

For most people it will be a decision between Facebook and LinkedIn but you can definitely use other platforms to generate leads and appointments for your business.

If you are a B2B business and you identify your targets based on business demographics such as industry and title then LinkedIn is a great place to start.

B2C businesses can still use LinkedIn though for things like connecting with vendors or PR professionals. You typically would not search for B2C customers on LinkedIn.

Facebook is a better place to focus if your prospect profile does not have a lot of business demographic identifiers. For example if you were someone like a holistic healer or a life coach then Facebook would be a better place to focus your efforts and you would then join groups that cater to the interests of your prospects.

Once you research and identify the correct platform then it is time for you to start joining groups. Spend some time researching the best groups that house your prospects and join 30-50 groups.

THE APPOINTMENT GENERATOR

Prospect Map, continued

Keep track of your group research below if needed:

1.______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________
10.______________________________
11. ______________________________
12.______________________________
13.______________________________
14.______________________________
15.______________________________
16.______________________________
17. ______________________________
18.______________________________
19.______________________________
20. ______________________________
21.______________________________
22. ______________________________
23. ______________________________
24. ______________________________
25. ______________________________
26. ______________________________
27.______________________________
28. ______________________________
29. ______________________________
30. ______________________________

THE APPOINTMENT GENERATOR

Your Value Identifiers

What Do Your Prospects Care About?

Value Identifiers are the topics and interests that are most important to your prospects.

This is an exercise in putting yourself in your prospect's shoes. If we can learn how they think and what is important to them, then it will help us to position our foundation as best as possible. This starts by having and understanding of the prospect's Value Identifiers.

What are your prospect's value identifiers?

1.____

2. ____

3. ____

4. ____

5. ____

6. ____

7. ____

8. ____

9. ____

10.____

Where can you go to find the best content to discuss those identifiers?

1.____

2. ____

3. ____

4. ____

5. ____

6. ____

7. ____

8. ____

9. ____

10.____

Creating Your Authority Leadership Platform

LinkedIn vs. Facebook

Note: If you are unsure on what would work best for you, let us know and we will give some feedback. Be sure to include which way you are leaning and why in the message.

Who is your target market? [job titles, industries, B2B or B2C, etc.]

____

____

____

____

____

____

Do you already have an audience? Yes _________ No _________

Do you think your prospects spend more time on LinkedIn or Facebook?

____

____

____

____

____

Based on the training, which network makes the most sense for you?

____

____

____

____

Why?

____

____

____

____

____

What's In a Name?

Who are your prospects and what do they care about?

Creating a group name that is enticing to your prospects

The name of your group is more important than you may initially think. You need to position your group in the perfect way to attract your most valuable prospects. In order to do that, you need to think about who the community is for.

You do NOT want to create a group that is all about you and your business. Create the community around the topics and interests that are most important to your prospects so that they will be willing and excited to join.

Who is the group for?

Fill out the section below to the fullest of your ability and tailor the categories as needed to fit your group.

Target Market:

____

____

____

____

Group Differentiators:

____

____

____

____

Vertical/Industry:

____

____

____

____

Job Titles:

____

____

____

____

Location:

____

____

____

____

Subject Matter

____

____

____

____

Your Group Name

Brainstorm a list of potential group names below.
From that list, pick the name that you feel best suits your community's needs.

Name 1: ____

Name 2: ____

Name 3: ____

THE APPOINTMENT GENERATOR

Managing Your LinkedIn Group

Best practices for posting, moderating and managing your group.

Building and growing an active and engaged LinkedIn group will take time and involves having a solid strategy in place for group management and moderation. And while it won't happen overnight, being the face of a solid Linked group will further establish you as an industry thought leader and is a great way to get your top prospects to "know, like and trust" you and your brand.

Main responsibilities of a Group Moderator:

Running a well-functioning LinkedIn group requires a daily moderation to ensure that things are running smoothly.

The main responsibilities of a group moderator will include:

- Approving/Denying group members
- Moderating group content and comments
- Posting engaging articles and discussion threads

Approving Content and Comments:

- Make sure content being posted stays on topics- will other members of the group find the content valuable?
- Make sure content being posted and isn't overly spammy or self-promotional.
- Group members should only be allowed to post one article or discussion question per day.
- Make sure the post is properly formatted.

Managing Your LinkedIn Group, continued

Group Engagement Strategies:

Finding and sharing valuable content will go a long way in helping you create an engaged group. You can utilize a content aggregator such as Feedly, to curate content to share in the group.

In addition, you can want to create a content schedule to keep things organized and to ensure that you have enough content to share into the group on a regular basis.

When you are creating a content schedule, you will want to consider the following:

- Gather enough content for1-2 posts per day.
- Find content that will help group members improve their business.
- Feel free to share 1-2 of your personal branded content no more than once or twice per week.

When you have a good strategy in place, you will begin to see your group develop into a highly engaged community filled with your top prospects. Now go gather your first batch of content to post into your LinkedIn group.

Managing Your Facebook Group

Everything you need to know in order to run an active and engaged Facebook group.

Running a well-functioning Facebook group requires a group manager(s) to go into the group at least once a day to moderate the activity and to make sure things are running smoothly.

Main responsibilities of a Group Manager:

- Approving/Denying group members
- Moderating group content and discussion threads.
- Posting engaging articles and discussion threads.

Notification Settings:

All group moderators will want to change their notification to settings to allow all group notifications to be sent directly to your email.

Group Engagement Strategies:

Creating a group master plan and content schedule will go a long way when helping you run a valuable and engaged group. You can utilize a content aggregator such as Feedly, to curate content to share in the group.

In addition, you can also create engaging discussion threads based on the topics listed below:

- Welcoming New Members to the group and asking questions to get them engaged immediately
- Posting a weekly challenge
- Highlighting miscellaneous business and marketing techniques
- Highlight a success story
- Accountability Check-Ins

When you have a good strategy in place, you will begin to see your group develop into a highly engaged community filled with your top prospects. Now go create your first batch of discussion threads for posting into your group, utilizing the discussion thread topics listed above.

Building Your Database

Your Database will become the lifeblood of your business. Make sure it is healthy and constantly growing.

Your Database will become one of your most valuable assets that you build using this system. It's extremely important that you have an understanding of who your best prospects are so that you are connecting with quality targets and not just random people.

If you are even the least bit hesitant about this work, make sure you talk to your advisor before you begin your database build so as not to waste time and connections.

There are two parts to the Database Build

1. Your initial Database Build Blitz
2. Ongoing Database growth and management

Database Build Blitz

The work that you will do over the next several days will be your blitz. You will be sending hundreds and hundreds of connection requests to create a healthy pipe line of prospects to reach out to.

200-400 prospects is a good number to aim for in the Database.

Preparation

- Track your searches on your campaign management spreadsheet using the prospecting research you did
- This will help you remember what searches you have already hit
- When you have enough runway mapped out you are ready to begin
- Have your connection request script prepared on a separate notepad or word doc to easily recall

The Build and What to Watch For

- Aim to pick up 200-400 new connections (adjust as needed based on your needs)
- Always use keyboard shortcuts to move as quickly as possible
- Track how many connections you send out on your campaign management sheet
- Acceptance percentage after 48-96 hours

    —Terrible 20%

    —Good 40%

    —Awesome 60%

- Pacing

    —Don't just unleash the beast and go crazy sending connection/friend requests. Test your build out first to 100 people or so and then take a break to see what kind of percentage you are getting.

    —A low percentage means your positioning needs work and most likely your profile needs to be changed.

    —If your percentage is good then proceed.

- Captchas

    —You will encounter captchas with most platforms after a certain time frame. (You'll see them on Facebook and LinkedIn for sure)

    —Don't sweat the captchas. They are part of the game.

    —Sometimes you may even encounter impossible captchas that may not let you continue

- If this happens then just stop for the day or try and send out requests the next day. (generally this only happens after extreme activity)
- Restrictions

    —You may get locked out of your profile (LinkedIn, Facebook etc etc) for the day if you send requests strong for 6-8 hours.

        —If this happens just come back the next day.

Ongoing Database Growth and Management

Your initial Database Build Blitz will not be enough to sustain you from now to the end of time. You will need to continuously grow your database to make sure your pipeline of prospects is always stacked.

You can do this two ways:

1. Hold a Database Build Blitz once a quarter (or as needed)
2. Grow your database in small chunks with consistent activity each week

We will take a look at the ongoing management of your database in module 6.

Database Building Scripts

Below are some examples of some scripts you can use for building your database.

LinkedIn:

Hey **>>INSERT FIRST NAME<<,**

I came across your profile here on LinkedIn and thought we could benefit from being connected.

Thanks!

>>INSERT YOUR NAME<<

Founder, **>>INSERT YOUR GROUP NAME<<**

Facebook:

Hi **>>INSERT FIRST NAME<<,**

I came across your info here and thought it wouldn't hurt to reach out! I'm the founder of **>>INSERT YOUR GROUP NAME<<.** *Maybe we could benefit from being connected here.*

Thanks!

Or if you found them in a group then you could use this message:

Hey **>>INSERT FIRST NAME<<,**

We're both in the **>>INSERT NAME OF SHARED GROUP<<** *and I thought it wouldn't hurt to reach out. I'm the founder of* **>>INSERT YOUR GROUP NAME<<.** *Maybe we can benefit from being connected here.*

Thanks!

If you are connecting on Facebook then after you send this message, you would then follow up with a connection request.

For homework, spend the next several days working to build your database of prospects by adding 200-400 connections/friends on Facebook/ LinkedIn or other platform of choice.

Multi-Touch Point Nurture Campaign

Notes: This campaign can be delivered to connections you have on LinkedIn or Facebook or other various platforms. Technically you can use this tactic on good ole email but you would need to tailor the scripts slightly to accommodate.

Playbook Scripts

Message 1: Thanks for Connecting

Message 2: Link to quality resource

Message 3: Link to high-level discussion in group

Message 4: Request for call

Message 5: Follow up to Message 4

Message 1: Thanks for Connecting

SUBJ: Thanks for connecting

Hey Bob,

I just wanted to drop you a quick note and say thanks for connecting with me here on LinkedIn (Facebook etc. etc.) and I'm looking forward to keeping in touch.

Take care,
Carl
Founder, **>>INSERT GROUP NAME<<**

Message 1a: Thanks for Connecting and reference to your group

SUBJ: Thanks for connecting

Hey Bob,

I just wanted to drop you a quick note and say thanks for connecting with me here on LinkedIn (Facebook etc. etc.) and I'm looking forward to keeping in touch.

I wanted to make sure you also received my invitation to join the **>>INSERT GROUP NAME<<**

Here is the link to the group, should you be interested: **>>INSERT LINK<<**

I look forward to seeing you in the group.

Take care,
Carl

Message 2: Link to quality resource (3rd party content)

SUBJ: Interesting **article** *on* **>>INSERT ARTICLE TOPIC<<**

Hi Bob,

I hope business is going well for you. I came across this article that I thought you would be interested in. It talks about **how to create scripts and messaging campaigns that will entice your prospects and get them on the phone with you.**

You can check it out here: **>>INSERT LINK<<**

There is a ton of great info in there including **exact scripts that you can use to generate more leads and fill up your calendar with meetings with your top prospects.**

I'd love to hear any thoughts you have on it. Take care!

Thanks,
Carl

Message 3: Link to group discussion

SUBJ: I'd love to hear your thoughts

Hey Bob,

There's a great discussion going on in the **>>INSERT YOUR GROUP NAME HERE<<** *that I thought you'd want to check out. I'd love to hear your thoughts on this:*

>>INSERT LINK HERE<<

Thanks,
Carl

Message 4: Request for phone call - generic

SUBJ: Reaching out (Touching base) (Checking in)

Hi Bob,

I'm trying to get to know my connections on LinkedIn (friends on Facebook) a little better so that we both might benefit from being connected. We've been crossing paths on LinkedIn (Facebook) for the past couple of months and I'd love to schedule a quick call.

Would you have a few minutes to chat next week? How does Friday, Mar. 15th in the afternoon sound?

Thanks,
Carl

Message 4a: Request for phone call - specific

SUBJ: Reaching out (Touching base) (Checking in)

Hi Bob,

I'm trying to get to know my connections on LinkedIn (friends on Facebook) a little better so that we both might benefit from being connected. We've been crossing paths on LinkedIn (Facebook) for the past couple of months and I'd love to schedule a quick call.

My company specializes in working with businesses like yours to help create targeted messaging systems to generate more leads and appointments with prospects using email and other social media platforms. We've worked companies like Microsoft, GKIC, and top names like Tony Robbins, Neil Patel, and many others.

I really think we could have a productive conversation. Would you have a few minutes to chat next week? How does Friday, Mar. 15th in the afternoon sound?

Thanks,
Carl

Message 4b: Request for phone call – hand-off to someone in your office

SUBJ: Reaching out (Touching base) (Checking in)

Rhonda,

I hope you're doing well.

Don Peterson *in my office, saw that you and I are connected on LinkedIn and mentioned he was planning on reaching out to you. I thought it might be good to do a bit of a warm introduction.*

Don *works with a lot of organizations that use* **>>INSERT COMPANY<<** *for* **>>INSERT BENEFIT STATEMENT<<.**
If you don't mind, I'd like to pass your info along to Don.

He is generally available from 2-4 PM CST on Tuesday and Thursday. Let me know a time that works for you and the best contact number and I'll send your information to him.

Thanks,
Carl

Multi-Touch Point Nurture Campaign, continued

Message 5: Request for phone call - generic

SUBJ: Re: Reaching out (Touching base) (Checking in)

Hey Bob,

A few weeks ago I sent you a message checking to see if you were open to chatting on the phone. I thought I would check back in with you to see if you were interested. As I mentioned before, I'm just trying to get to know my connections on LinkedIn a little better so that we both might benefit from being connected.

I'd like to schedule a call with you. If that's not possible, I'd love to open up some dialogue with you over email. Please let me know if the morning of Tuesday, April 8th would work for you. I hope to hear from you soon.

Thanks,
Carl

Message 5a: Request for phone call - specific

SUBJ: Re: Reaching out (Touching base) (Checking in)

Hey Bob,

A few weeks ago I sent you a message checking to see if you were open to chatting on the phone. I thought I would check back in with you to see if you were interested. As I mentioned before, I'm just trying to get to know my connections on LinkedIn a little better so that we both might benefit from being connected.

My company specializes in working with businesses like yours to help **create targeted messaging systems to generate more leads and appointments with prospects using email and other social media platforms. We've worked companies like Microsoft, GKIC, and top names like Tony Robbins, Neil Patel, and many others.**

I'd like to schedule a call with you. If that's not possible, I'd love to open up some dialogue with you over email. Please let me know if the morning of Tuesday, April 8th would work for you. I hope to hear from you soon.

Thanks,
Carl

Multi-Touch Point Nurture Campaign, continued

Message 5b: Request for phone call – hand-off to someone in your office

SUBJ: Re: Reaching out (Touching base) (Checking in)

Terri,

A few weeks ago I sent you a message checking to see if you were open to chatting with **Don Peterson** *on the phone. I thought I would check back in with you to see if you were interested.*

How does next week look for you? Let me know a time that would work for you and the best contact number and I can forward your info to **Don***.*

Thanks,
Carl

THE APPOINTMENT GENERATOR

Messaging – Script Writing Best Practices

There is an art to writing scripts. It takes practice, testing and an understanding about your target. The way you would approach the founder of a CPA firm is different than how you might approach a young entrepreneur of a tech start-up.

Again, you need to be thinking about what is enticing to your prospects. Make your copy speak to them.

You can use the templates provided to you in the past lessons but the ability to tailor those scripts to fit your voice and targets will be of a great benefit to you and your business.

Let's take a look at an example of a script written from a template and some things we can do to tailor it.

Phone Call Request Script Version 1:

David,

We've been crossing paths on LinkedIn for the past couple of weeks and I'd love to schedule a quick call.

My company, XYZ Industries has helped many companies such as yours and I think we could have a productive conversation.

In addition to proposal services, we support our clients by providing business development, business analysis and capture management among many other federal market-growth influencers.

If you are interested in a no obligation consultation or just want to learn more about how your company may benefit from our support, feel free to contact me to coordinate a time to talk.

Peter

Background:

First let's talk about some of the details surrounding this message. This is from someone who target's government contractors. Their business helps these contractors create proposals that have a better chance of winning the job over the average proposal submitted. They also get their clients more opportunities to submit proposals, due to their relationships they have and knowledge of the government contracting industry.

The assumption here is that this message is being sent in a multi-touch point nurture campaign and that several messages have already been sent prior to this message.

Thoughts on Version 1:

Right now it is stiff. It feels like it is written to someone you don't know. The key to writing scripts is to assume the relationship. Try to make things casual so the message feels warm and not like the back of a brochure. Remember, casual is not unprofessional. Casual is being loose with your copy.

Here are some recommendations on what to do with this copy:

1. I always put "Hey" in front of the name it is addressed to. I think it loosens up the tone. Some people may think that is too informal but I like that approach.
2. Any time you get to throw in a conjunction, do it. "If you are interested I would be more than happy to send you some info," sounds much more impersonal than, "If you're interested, I'd be more than happy to shoot over some info."
3. For the first line I would add "I'm trying to get to know my connections on LinkedIn a little better so that we both might benefit from being connected." as the first sentence. It will help bolster the first paragraph some. It gets to the heart of the matter of what I am trying to do and it calls out the fact that I'm looking to find how we can BOTH benefit.
4. The next two paragraphs is the "money text." It's where you will hook them. It's okay to be informative but it needs to be personal. The first sentence of that section should include language about what Peter helps with. Again, it needs to be loose. It can't be written in a way that lists items formally 1 by 1.

There is a difference between this:

My company specializes in business development, business analysis, and capture management.

and this:

My company specializes in working with 3rd party government contractors to basically help win more government contracts. We have a good deal of inside information that helps us get a jump on the projects that will be needing proposals. Since these projects are generally large in nature, a ton rides on the proposal. We help companies to create the right type of proposal that the government wants to see for these types of projects, which gives our clients a leg up in securing the deal.

The first example reads like a brochure line. The second sounds like a real person telling you what they really do. Now there might be a better way to write what I have in the second example.

There might be a way to condense and their might be better terminology, but the vibe and essence are there.

I would also not use the "no obligation consultation" language. Again, too much like a brochure and very impersonal. Which would you rather have proposed? A "risk free, no obligation, consultation" or "to spend a few minutes to figure out how we can help each other out." The second one is better.

I'm trying to show examples of how to say the same thing but loosen up the tone.
So you might have a message that looks like this:

Phone Call Request Script Version 2:

Hey David,

I'm trying to get to know my connections on LinkedIn a little better so that we both might benefit from being connected. We've been crossing paths on LinkedIn for the past couple of months and I'd love to schedule a quick call.

My company specializes in working with 3rd party government contractors to basically help win more government contracts. We have a good deal of inside information that helps us get a jump on the projects that will be needing proposals. Since these projects are generally large in nature, a ton rides on the proposal. We help companies to create the right type of proposal that the government wants to see for these types of projects, which gives our clients a leg up in securing the deal.

Do you have a few minutes to chat next week? I'm typically available on Wednesday and Thursday afternoons. Let me know if there's a time that works for you and the best contact number.

And if you are interested, I can forward over some upcoming RFP's that are coming up in the next few months that I not only think you would be interested in, but they haven't been announced to the public yet. No strings attached, I just like to help out.

Thanks,
Peter

Ben Cohen

Owner, Cohen Architectural Woodworking

Before working with Josh, we didn't have much marketing put together. We were doing a lot of face to face sales. A lot of our sales were just from referrals and face to face contact.

Honestly, I was one of the people who thought that it wouldn't work for our industry. I was pretty skeptical of it. After talking with the other owners we thought, "You know what? Let's give Josh Turner a chance." And the next thing I knew, it was taking off.

It takes down a lot of the barriers. He's positioned us as experts in the industry. It's increased our revenue about 40% per year, and that's a huge deal.

It wouldn't have been possible without it. It looks like next year, we'll have a 30-40% increase in our annual revenue again.

Even with my marketing background, I couldn't have done it without Josh's help. For us, it's paid off big time. I'd highly recommend it.

Notes and Big Ideas

The Next Level of TAG

These core components were derived from a higher level of lead gen theory. This theory is not just something that works for TAG but for ALL lead gen systems.

6 Core Components to Lead Gen

1.____

2. ____

3. ____

4. ____

5. ____

6. ____

These core components can be found in every lead gen/ marketing/advertising campaign ever created.

1. Profiling

Profiling is the act of determining who it is that you will be going after. What are the details surrounding your targets? Are they identified by title and industry? Are they identified by how they think and feel? What are their professional interests? What are their pain points? Where are they located geographically? Every detail surrounding their profile needs to be laid out in a clear and communicable way.

It does not matter if you think your best approach is to target these people on LinkedIn or Facebook or on the radio. It doesn't even matter if you target your prospects online or offline. What matters is that you can find the key info that identifies your top targets.

2. Positioning

Positioning is the act of optimizing all of your online and offline properties so that they cater to your prospects. For example, making sure your LinkedIn profile is optimized in a way that is enticing to your prospects. This can apply to any online property whether a social profile or even your website.

Positioning can be more than just the optimization of an online property. It can also apply to how you engage online with your prospects. For example, your twitter profile may be optimized so that when prospects search for you they can find you. But the content you share also is a ***Positioning*** play. For example, you can't have a Twitter/LinkedIn/Facebook profile that caters to CFO's of construction companies and yet all the content you post is about Harry Potter. You are then positioned poorly.

Online groups or communities that you start, nurture, and manage are also Positioning plays. In some instances the size of the group matters as it can an opportunity for lead generation. But that is a separate issue from ***Positioning***. In many cases, especially on LinkedIn, the benefit to starting a group is a positioning play. When you are seen as the "Founder of *'Group XYZ'* Professionals" then you are positioned in a way that elevates you above your competitors.

At its core, ***Positioning*** can be summarized as any movement you make online and offline that can be seen by the public. If it cannot be seen by the public then it is not ***Positioning***.

3. Prospecting

Prospecting is simply the ability to identify where your prospects are hanging out at. That's it. This is done by taking the ***Profiling*** info of the prospect and researching what platforms they are most easily accessible. Again, this could be online or offline properties or both.

Social media platforms are a great place to go prospect because the playing field is level for everyone unlike T.V. or large print publications. So, although ***Prospecting*** is not limited to social properties, they are a great place to start.

4. Database Building

Database Building is the act of being able to take the info you found through ***Prospecting*** and build a ***Database*** of your prospects so that you can reach out to them to develop relationships, and ultimately create leads for your company.

This is commonly done by connecting with them on a social platform like LinkedIn. But database building could also come in the form of doing online research and creating a list of your prospects in a spreadsheet and then engaging through email. It could also come in the form of growing an email newsletter etc etc.

To truly have a ***Database*** there needs to be a central location which the info can stored and reviewed at any time needed. CRMs do this but it is also possible to build a ***Database*** and track it on a spreadsheet so that you can customize data as needed. Once the number of prospects you are tracking reaches a certain size, a CRM will be crucial for managing your database.

5. Messaging

Messaging is where the rubber meets the road in this process. The best way to fully utilize this entire system is to perfect your ability to craft messages that entice your prospects to bite on a call to action that you want them to do.

There are many details that go into ***Messaging*** such as: How many people get messaged at a time? What is the playbook of the ***Messaging*** campaign? How many messages are in the playbook? How much time should pass between each message? What are the scripts for the messages sent?

There are various answers to these questions that depend on a variety of aspects, mainly who is the target and what is the call to action. The tougher the target, the more nurturing that will need to be done in the ***Messaging***. The tougher the call to action, the more nurturing that will need to be done.

Messaging is not just limited to sending emails and social media messaging. A message can also be communicated in a variety of different ways such as the copy you use for landing pages, sales pages and online ads.

6. System

The first five sections of this document deal with the setup of lead gen theory. The sixth section is simply referencing the ***System*** utilized to manage it. Anything that pertains to CRM's, calendar schedules, spreadsheets, tracking sheets, automated processes etc. etc. have to deal with the ***System***. And the only way one will be successful is having a clear understanding of all the parts of the ***System*** and have the pieces in place to manage the ***System*** on an ongoing basis.

When setting up a ***System*** it is actually best to work backwards. For example, what is the main objective in the ***System***. Once that is determined then one simply needs to work backwards to implement a series of "if this, then that's" to make sure on any given day that the ***System*** has supplied you with what you need to get the activity.

Theory vs. Tactic

Every activity you focus on in this system can be be divided up into either a ***Theoretical*** focus or a ***Tactical*** focus and it is important to know the difference between the two.

For example, if you are gathering 3rd party content for a campaign, there is a specific process involved to maximize the value you get out of gathering content with putting in very little effort. That process is your ***Tactic*** and in this case, it could involve being able to utilize a content aggregator like Feedly to be able to set up RSS feeds and other types of feeds, to automatically gather the best content to distribute to prospects.

How do you know the content is the best possible content? That is the ***Theory*** aspect of the activity. You need to be able to determine what constitutes quality content so that you are not gathering content randomly that doesn't cater to the target of the campaign.

Creating an online group is another example of this. There is the ***Tactical*** approach to creating a group on LinkedIn or Facebook, where to go to set one up, what buttons to click, what areas to fill out etc etc. The ***Theoretical*** approach for this activity would be the group name that you create, and the copy you write for the group info sections, making sure that is all enticing to the targets of the campaign.

What is Success for a Campaign?

Success is simply defined as the mastery of the ***Theory*** and the ***Tactics*** behind each of the ***Six Core Lead Gen Components*** on this document:

1. ***Profiling***
2. ***Positioning***
3. ***Prospecting***
4. ***Database Building***
5. ***Messaging***
6. ***System***

If you are ever struggling with a campaign or a campaign is just not generating the results you would like, it will always have to do with the theoretical and/or tactical decisions made in any one of the six areas. Find which of the six areas is lacking, and then improve, and you will see an increase in success for your campaign.

The Next Level of TAG, continued

Why Is This Important?

Ken Roberts
Independent Insurance Broker

I've been online marketing since 1992. A couple years ago, my company of over a decade went bankrupt. When everything went upside down for me was right about the time that I came across Josh and his first book Connect.

After watching all the videos with Josh and reading his book, it just made sense. There wasn't any garbage attached to it. I've been around long enough to know what is a bunch of garbage, and what is actually solid and has some solid foundation to it.

And so the little bit of money that I did have coming in, I put it all towards working with Josh because I knew that it was going to work.

These people that I'm attracting now, literally I can do business with every single one of them and they're perfect prospects, and they're all warm. I guess the most surprising thing is that I have people coming to me all day everyday saying, "let's talk."

And that's just following the system. You don't have to recreate the wheel. Having the coaching on top of that it's like it strip 6 months of testing and guesswork right off the top. Having that coaching and that sounding board has been invaluable.

Looking back I feel as if I've wasted an enormous amount of time and enormous amount of money on all these other things that might work for a short period of time… and most of them don't work at all. They work for the person that's selling the system, not the person that's using the system.

I feel like I have my feet planted back on the ground. It feels like a real business again.

So somebody that's new in an industry coming into this - they don't have to have 20 years of experience. They can be a newbie and do this in a short period of time.

It will work. If you follow the system and you put the time in, I don't know how it wouldn't work. The integrity of Josh and his team is real. It's above anything I've experienced from other programs.

How to Get More Clients with What You Already Have

Name the 3 Key Sales Systems to grow your business.

1. ______________________________
2. ______________________________
3. ______________________________

Name the 3 ways to elevate your sales results.

1. ______________________________
2. ______________________________
3. ______________________________

What is the Number 1 sales distinction?

____

____

____

What is the baseline strategy?

____

____

____

____

What does it mean to reverse engineer the sales process?

____

____

____

____

What does the acronym "POI" stand for?

____

____

____

How to Get More Clients with What You Already Have, continued

What is the true purpose of setting an appointment?

____

____

What is the easiest way to persuade or influence someone?

____

____

What is the definition of a script?

____

____

What are the 5 Laundry Lists?

1. ______________________________________
2. ______________________________________
3. ______________________________________
4. ______________________________________
5. ______________________________________

The 3 sections of a closing script that I need to be incorporating are:

1. ______________________________________
2. ______________________________________
3. ______________________________________

The 5 different types of benefits I need to consider are:

1. ______________________________________
2. ______________________________________
3. ______________________________________
4. ______________________________________
5. ______________________________________

Notes and Big Ideas

The Webinar Client Funnel

This funnel can work regardless of the vehicle, whether you are most comfortable using a webinar format or prefer video, teleseminar, in-person events, or otherwise.

Will your vehicle be a:

- ☐ Webinar
- ☐ Video
- ☐ Teleseminar
- ☐ in-person event
- ☐ The "IPO" Title Formula:

I = "I identify myself (your prospect) in the title"

P = "Paint a pretty picture of the end state of your customer after they apply the learnings"

O = "Overcome an objection by picking one thing a potential attendee might use to talk themselves out of going and address it."

Fill in the blanks:

How **[Avatar] [Benefit]** by **[How Benefit Achieved]** ...
Even if **[Objection]**

For example,

How **[CEOs with Teams of 10 People] [Increase Productivity and Profit by 10%]** by **[Putting an End to Disruptive Team Behavior]** … Even if **[the Thought of an 'Uncomfortable Conversation' Makes You Weak in the Knees.]**

____

____

____

____

____

The Webinar Client Funnel, continued

What is your "Big Idea" or core premise?

____

____

____

Why should your prospect care about this webinar?

____

____

____

What is the number 1 inspiration that leads your clients to action?

____

____

____

What are the secondary motivators for them?

____

____

____

What will you teach (your content section)?

____

____

____

____

____

____

What will your call-to-action be? (ie Strategy Session, etc)

____

____

____

The Webinar Client Funnel, continued

Milestones:	**Due Date:**
☐ Outline Complete	________________
☐ Script Drafted	________________
☐ Powerpoint/Keynote Drafted	________________
☐ Revisions to Script & Slides Complete	________________
☐ Registration Page Live	________________
☐ Practice Dry Run	________________
☐ Record Presentation	________________
☐ Stealth Seminar Ready to Go	________________
☐ Webinar Goes Live!	________________

Notes and Big Ideas

Marketing Systems

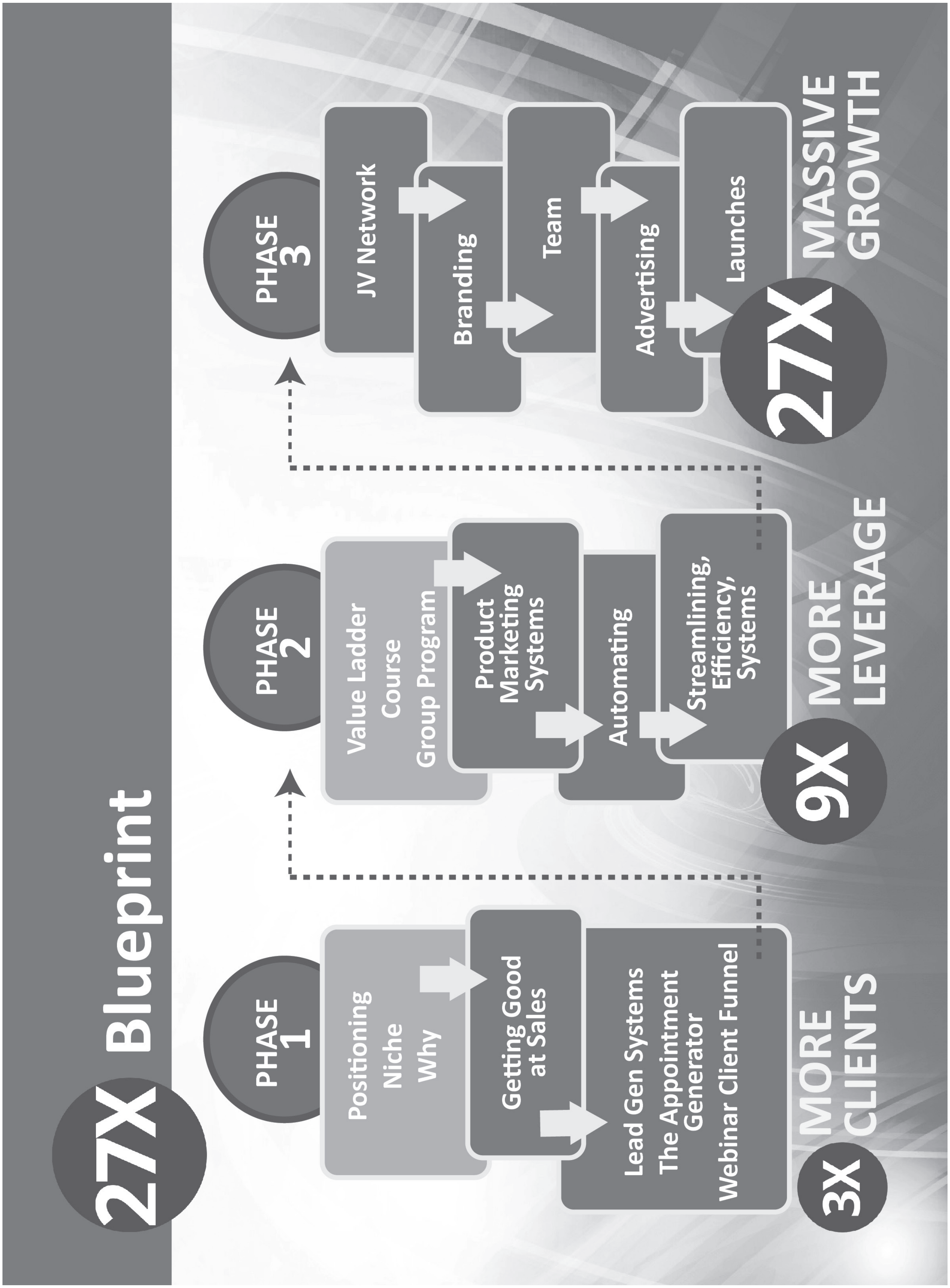
Check those that will generate the best results for you:

- ☐ Placement of webinar ads on your website (home page, sidebar, etc)
- ☐ Promote webinar in your email signature
- ☐ Social Media Posts:
  - ☐ Facebook
  - ☐ LinkedIn
  - ☐ Twitter
  - ☐ Instagram
- ☐ LinkedIn Messaging Campaign
- ☐ LinkedIn Group Announcements
- ☐ Personal Emails to LinkedIn Connections
- ☐ Personal Emails to Facebook Connections
- ☐ Twitter DM Campaign
- ☐ Broadcast Marketing Emails (Mailchimp, Infusionsoft, etc)
- ☐ Facebook Ads
- ☐ LinkedIn Ads
- ☐ Twitter Ads
- ☐ Joint Venture Partnerships
- ☐ Paid Email Drops
- ☐ Partnerships with LinkedIn Group Owners
- ☐ Partnerships with Facebook Group Owners
- ☐ Promotions with Trade Associations
- ☐ Smile and Dial!
- ☐ Other:
  - ☐ ______________________________
  - ☐ ______________________________
  - ☐ ______________________________

Notes and Big Ideas

DAY 2

Intention for Today (Day 2!) at ASCEND



27X Blueprint
PHASE 1
Positioning
Niche
Why
Getting Good at Sales
Lead Gen Systems
The Appointment Generator
Webinar Client Funnel
3X MORE CLIENTS
PHASE 2
Value Ladder
Course
Group Program
Product Marketing Systems
Automating
Streamlining, Efficiency, Systems
9X MORE LEVERAGE
PHASE 3
JV Network
Branding
Team
Advertising
Launches
27X MASSIVE GROWTH

Application

Application for Live "Hot Seat" Coaching with Josh Turner and Our Team

This evening, Friday May 13

We appreciate your authentic answers to the questions below, so that Josh can tailor his coaching to best support your situation.

Your first and last name:	
Type of business:	
Your great business challenge:	
Do you have a clearly-defined, profitable niche?	
Do you have various programs to offer clients?	
How successful are you at enrolling clients during 1-on-1 consultations?	
Do you have a sales & marketing system that consistently brings clients into your business?	
How effective has your business been at building an audience, following, or list?	
What was your business revenue last year? How satisfied were you with it? Where do you want to be this year?	

Please submit your completed form to our team at the back of the room.

Thank you!

80/20: Finding the Time

The first step is listing out everything that you do for your business and all of your responsibilities:

4 quadrants exercise

After listing out all of your responsibilities, place each of them into one of the 4 quadrants below.

Anything below the line, you should be working to eventually outsource or hand off to a team member. ESPECIALLY the 4th quadrant "Don't Like / Not Good" ... that's the Suck Bucket. And it's gotta go.

Notes and Big Ideas

Dan Demers

Founder, Remission Consulting

Prior to working with Josh, it was really an uphill slog. We didn't have trust. It was very low credibility. Again and again we'd put a ton of proposals out there and we were getting goose eggs. We missed on virtually every proposal to a brand new unknown client.

Now we are gaining immediate traction as a trusted advisor and expert in the space. We were able to close an $8,000 keynote speech which then then led to a 5 figure high-level contract. That would have normally taken me 18 months to get to that place. Within weeks using your concepts we were able to close contracts with a comma and we're closing new contracts with lots of integers on both sides of the comma.

The systematic approach is helping me now figure out how to finally scale beyond what has historically been a lifestyle business for me. We've been doing it for 6 years, it's been just me. A one man show.

We have quadrupled our Pipeline and I'm now scaling like never before. There are a lot of folks out there who are harping on and pushing funnels and campaigns and programs but literally within days of using your approach we got results. You can't deny it.

As many people know, when you have a business like this cashflow becomes a dragon. It can take flight and bring you with it or it can turn around and light you on fire and burn you and eat you up. So for me that struggle of cashflow in a professional services firm has prevented scale.

With looking at next year's projected revenues, and being able to comfortably project 5 figure gross revenue receivables month to month takes my business from a place of, "I love what I do but I hate the cashflow problem" to, "I love what I do and we can start have fun !"

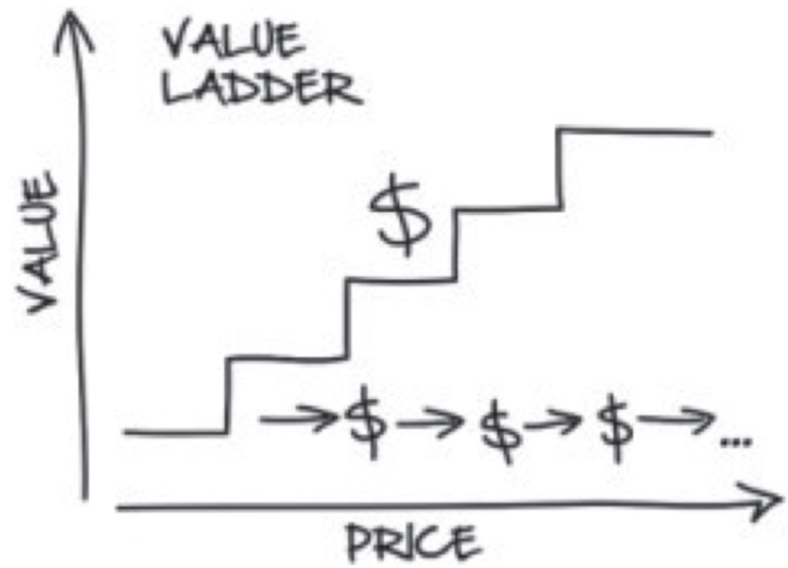
We can do things, and we can grow the business, and we can take vacations, and we can plan. And it's led to a lot more ease and comfort in the home with my wife and the kids. It's been a real godsend. Being positioned as a thought leader - all of a sudden they're letting me in, into these legitimate earnest conversations. It's like hitting the light speed button.

If you find yourself in a business where you're not selling commodities, so it's not a price play - it's a value play… if you're a consultant, if you're a coach, if you're an advisor or if you in any way shape or form are B2B, Josh Turner's system is simple. It's not a get-rich-quick plan but it is an incredibly effective way to scale.

Notes and Big Ideas

Your Value Ladder

A "Value Ladder" is the suite of products and services that you offer, moving clients from lower to higher price offers.



Your value ladder might eventually look something like:

- ☐ Low price course
- ☐ Higher price course
- ☐ Group program
- ☐ 1-on-1 coaching
- ☐ A la carte services
- ☐ Fully outsourced services

Every business will be different. The key is not looking at that list, and thinking "well, this one thing doesn't apply to me." The key is to think about what kind of offers you can make at a lower price point, to bring more customers into your business to give them a taste of what you're all about, without them having to go straight for the big enchilada.

By doing this, you'll generate more revenue and have more prospects at the low end that will ASCEND to the high end.

Your Value Ladder, continued

Here's another great way to visualize your value ladder, as you ASCEND clients from free or low price offers up to your high-end programs.

(image courtesy of Suzanne Evans Coaching)

Notes and Big Ideas

Assessing and Planning Your Value Ladder

Most business owners are leaving money on the table, by not offering prospects a few different options. If all you offer is a high-priced service, then you are missing out on those prospects who aren't ready to make that investment yet. What if you had a lower priced course or product to offer them, to get the relationship started? Conversely, a lot of people play too small and are leaving money on the table.

This exercise is intended to help you evaluate the different offers you have, where your gaps might be, and how these all fit into your 12 month plan.

Consider what you currently have, and map out where you'd like to see things eventually:

Low Price Course or Product:
___________________________________ (Price: $ ____________)

Mid-Level Course or Product:
___________________________________ (Price: $ ____________)

Group (1 to Many) Program:
___________________________________ (Price: $ ____________)

High-End Consulting Service:
___________________________________ (Price: $ ____________)

1-on-1 Consulting or DFY:
___________________________________ (Price: $ ____________)

Enterprise Level Program:
___________________________________ (Price: $ ____________)

Other:

___________________________________ (Price: $ ____________)

___________________________________ (Price: $ ____________)

___________________________________ (Price: $ ____________)

Having too many buckets can be distracting. I've given you 6 above to consider, but for most businesses 3 will be the best place to start. You want to have enough buckets that you have offerings for different clients at different stages of their "purchasing journey" but not so many different things that it is confusing and unfocused.

Embedding your WHY into your marketing.

"People buy your WHY more than your WHAT."
– Simon Sinek

It's important that you tie your Value Ladder in with your values. Just having different products will create sales. But not as many as if your prospects really identify with what you stand for.

Especially at higher prices, people need to identify with what you stand for. Remember...

"People buy your WHY more than your WHAT." – Simon Sinek

For each of the rungs on your Value Ladder (your suite of product/service offerings), what is the WHY behind each of them?

Start first with your overall WHY that we worked on in Day 1:

My big WHY is:

____

____

____

Now for each of your offerings on your Value Ladder, how do they fit into this big WHY?

Low Price Course or Product:

____

Mid-Level Course or Product:

____

Group (1 to Many) Program:

____

High-End Consulting Service:

____

1-on-1 Consulting or DFY:

____

Enterprise Level Program:

____

How can you embed this into your marketing for each of these programs?

____

____

____

Notes and Big Ideas

The Power of Creating Leverage

Leveraging is priceless for you & your business for too many reasons to list but here's a few:

1. Save your most precious commodity - your time. If you spend the time to do this right the first time, the content and programs you create can be used time and time again for thousands of prospects and clients for years to come.
2. Reach more people - this goes along with number one. Once your creation is out there, it can reach people anywhere any time no matter what next thing you're busy doing.
3. Help people get to know, like and trust you - long before they speak with you or meet with you.
4. Increase revenue streams - hopefully you can see how the first 3 reasons can lead to more income. If you are reaching more people more of the time and helping them trust you more before you connect, it would stand to reason that this could easily mean more business. And of course there's the revenue you make from the products you actually sell which we calculated a bit earlier.

How do you come up with the right kind of "leveraged" programs that will allow you to begin serving in a "one-to-many" model? Here's a quick exercise to help you think through it!

1. Name at least one "Golden Nugget" (life-changing idea, valuable piece of advice, proven system, etc.) that you have repeated to at least two or more people that got significant results.

____

____

____

2. Add up the number of people you could reach with one short video post explaining that Golden Nugget. (Facebook, LinkedIn, Instagram, Twitter, Pinterest, Email List, etc)

____

____

____

3. Write one fascinating short story you've told about yourself that almost always has other people feel intrigued, moved, inspired or more connected.

____

____

____

The Power of Creating Leverage, continued

As mentioned in #1, you can save a lot of time, money and energy by putting your best foot forward the first time. However, it's equally important to note that **you are not pursuing perfection.**

This is a precise and calculated process but it is carried out quickly and adjusted on the fly. That is an important key to success.

To help, here's a list of best practices to be mindful of:

1. Be evergreen as much as possible.
2. Tie into the big picture and your other offers.
3. Think about how it will fit it into your overall marketing funnel.
4. Use the least amount of materials (think "minimum viable product") for maximum results - time is precious (but don't cut corners).
5. Use bonuses to help increase sales, when appropriate.
6. Use upsells for things they are naturally going to want either right after they accomplish the goal of the program or to majorly expedite the process and/or have some of it done for them.
7. Repurposing content can be priceless!
8. Make it easy for you and others to promote.
9. Make use of a group dynamic when possible for team building, support, and masterminding.
10. Positioning is key - for example, maybe you are creating a program for private consumers, but want to use a video from your past corporate professional training program. You may worry that the format looks different than the newer videos. Position it as a "secret look into the exact training you use for your corporate clients."

The Power of Creating Leverage, continued

Another important aspect to consider, when designing your programs, is duration. At different points on your value ladder, you may want to offer programs with varying duration based on the outcomes and delivery model.

Here are a few ways to think about different time horizons and what you might deliver for a shorter duration program vs. a longer duration:

1. How could you change someone's life in 3 years (general concept and benefits for them as opposed to exact steps)? i.e. In 3 years someone can have a brand new healthy lifestyle they never thought was possible and feel confident that they'll never go back to the way things were. OR - In 3 years, someone can have a completely stable financial foundation, know where every penny is going and never have to worry about getting audited again.

2. How could you change someone's life in 1 year? i.e. In 1 year someone can know how to help their body continue to rid of unwanted symptoms and know that they can stay on course and never experience yo-yo weight again. OR In 1 year someone can finally have a personalized tax and financial strategy & system to follow for years to come.

3. How could you change someone's life in 6 - 9 weeks? i.e. In 9 weeks, someone can feel significant improvement in many areas of common health complaints and see the results for themselves on the professional lab work. OR In 9 weeks someone can get their business set up properly and all taxes caught up and filed accurately.

4. What is one concept, system, tactic, etc. that you can teach to a group that makes use of the group dynamic? (Even if it simply shows someone that they are not alone - that other people struggle with the same things.) i.e. Group health challenge to take a lab test then take appropriate supplements every day for 30 days then re-test while reporting any missed doses in the FB group. OR i.e. Group tax challenge to set up your system to maintain all expenses moving forward and share with the group what worked best for you and your lifestyle.

Courses and “Info Products”

PRO TIP: Next do keyword research to see what your ideal client is currently searching for. Do market research to see what’s comparable, what’s working and what the price points are.

Hopefully now, you’re starting to see the possibilities for coming up with leveraged products like private courses, group programs and info products.

Naturally the first thing to do is to figure out what your course or product will be about.

Here are a few questions to ask yourself:

1. What’s the hot topic that a wide variety of your ideal clients are always asking about?

____

____

____

____

2. What are your most powerful techniques and effective solutions to that problem?

____

____

____

____

3. What makes your approach and the results you get different from your competition?

____

____

____

____

Courses and "Info Products", continued

Once you have the topic, you can start to expand on what the course, program or product will look like that solves that common problem with your ideal clients (that you specialize in solving.)

1. What obstacles are they going to run into along the way?

____

____

____

____

PRO TIP: Pre-sell your course before it's ready, to gauge actual buying interest.

2. What tools and resources do they need for optimal performance?

____

____

____

____

3. What's the minimum you can give them for the maximum results? Is there anything else that can make the results be achieved more quickly?

____

____

____

____

Courses and "Info Products", continued

Ultimately, you need to find what process works best for you.

We recommend doing a general outline of the course with bullet points first before going back to expand on each point to complete the course curriculum.

Then you can go back and...

(fill in the blanks below)

1. Remove anything that isn't absolutely

   ____ .

2. Look at the content through beginner's eyes so that it's easily __

   ____ .

3. Get feedback from someone who is

   ____ .

Once you have the course curriculum completed and reviewed, it's time to go back to "teachify" it and "gamify" it before using the final product to create workbooks to enhance the learning experience.

1. Where and how can you make the material easier to consume?

____

____

____

2. What action steps can you add in for hands-on practice for retention?

____

____

____

3. Did you address all learning styles with visual aids, auditory aids, graphical representations, videos, PDF transcripts, etc.?

____

____

____

4. Where can you make it more fun?

____

____

Notes and Big Ideas

Group Programs

A streamlined method to get started is to use the same info product or course, and add a group element for additional support and bonuses. Or, perhaps you create an entirely new group program.

There is a power in groups that we don't have alone. This is a great opportunity to grow and leverage a supportive like-minded community when possible. It also continues to strengthen your authority leadership platform in your space.

Name 3 benefits of group programs for you (and your business):

1. ____
2. ____
3. ____

Name 3 benefits of group programs for your clients:

1. ____
2. ____
3. ____

Name 3 tools to help support group programs:

1. ____
2. ____
3. ____

Name at least one topic that you could teach to a group in 6 - 9 weeks:

____

____

____

Name at least one topic that you could teach to a group in one year:

____

____

____

Notes and Big Ideas

Product Marketing

When you first begin marketing a course, info product, or other low price program, it can be a bit like heading into uncharted waters. After all, marketing a course is much different than selling your high end services.

When we first created Linked University, I had the same problem! At the time, I didn't know of any resources to show me how to do it. So I spent countless hours, nights and weekends, reverse engineering the most popular product marketing funnels.

I ended up with a strategy that worked very well, I did $10,000 in sales in the first month! (Since then, we've built on that first success and done several million in sales and served over 6,000 through this one program!)

There are really two key areas to consider in your first product launch.

1. What are you going to do, to market the product/program? (let's call this the "Marketing Plan")
2. Where are the people going to come from, that you are going to market it to? (let's call this "List Creation")

Here's what I did for each of these two areas, and I know that this same process would work for you too. Even if you have launched a product before, there are going to be great takeaways for you here.

List Creation

- To start, I had a couple hundred people on a mailchimp list.
- Leading up to the launch, I started building our list by promoting a lead magnet. This created some organic growth. Maybe a few hundred additional subscribers.
- All the while, I was also sending lots of LinkedIn connection requests and building my LinkedIn database.
    - Then, shortly before the launch marketing began, I exported these LinkedIn connections. LinkedIn gives you their emails.
    - I took all of those emails, and sent them an email saying "Hey, I've got a really cool project coming up and I'm planning on sharing the behind-the-scenes of how it all progresses over the coming weeks. If you don't want to hear about it, click here to opt-out and I won't send you any more emails about this."
    - This helped me get another 3,000+ prospects onto my email list. Woohoo!

Product Marketing, continued

Marketing Plan

- I had been sending some updates to my list, but they were sporadic at the time. So I needed to find a way to warm them up, get them engaged in the work I was doing, and prime them a bit…BEFORE I started pushing the new product.
- What I ended up doing, was sending 2 emails per week for about a month, leading up to the launch. These emails were simply positioned as a "behind the scenes" look at a new program I was developing.
    - These emails weaved in business lessons such as "why I'm creating a course and why you should think about this model too" and others.
    - They also included content specific to my subject matter expertise, so that I was building a case for why they should be interested in this program that I was launching.
    - Doing this helped to engage the list and prime them for the program launch.
- Ben and I created 3 videos to use for the actual program launch. The videos were:
    - "5 Key Principles for LinkedIn Success"
    - "The LinkedIn Secret that will Change Your Business:
    - "Behind the Scenes with Top LinkedIn Marketers"
- I didn't really know what I was doing. I just mimicked what I had seen other folks do, who seemed like they were having success. We rolled the 3 videos out over 10 days, and then opened the doors to the program on August 10, 2012.
- We offered an introductory price of $98, and made that price good until August 20. During the 10 day period between the doors opening and that price expiring, we sent only 4 emails. If I knew then, what I knew now. Heck, we didn't even do a webinar!
- Nonetheless, it was a huge success for us! We had about $10,000 in sales and roughly 100 business owners had joined Linked University. The rest is history!

The playbook you see above, it's replicable for anybody. I spent a ridiculous amount of time reverse-engineering marketing funnels to figure out how to do it. Having this roadmap, and the support of my team and I, will virtually eliminate that for you.

Next Level Product Marketing

You might decide to incorporate some of these best practices into your first product launch. Or, you might wait until things are up and running. Either way the following tactics will become staples in your arsenal for promoting your programs and courses.

And the beauty of these, is that they all help to drive more leads and clients into your high-end programs as well.

- [ ] Webinar Marketing
- [ ] Sales Pages
- [ ] Email (we will be diving into Email on day 3!)
- [ ] Joint Ventures (day 3 as well!)
- [ ] Flash Sales
- [ ] Phone Sales (downsell)
- [ ] Other:

____

____

____

____

____

Notes and Big Ideas

Personal Vision

Sometimes it's important to step back, and ask yourself...

"Why am I doing all of this?"

Name 3 things you want to accomplish in your personal life this year:

1. ____
2. ____
3. ____

What's the BIG WHY your business will fund?
(This is the biggest thing that your business success will allow you to achieve personally.)

____

____

____

____

____

Business Vision

I'm a big believer in focusing on what's in front of you. Yet, without a vision for where you want to be in the long term...how do you know that your actions today are going to get you there?

When I started my business, I had no intention of creating a $7 million company. I was just focused on paying the bills. It wasn't until I made it to the $300k mark that I thought, "Wait a minute, why can't it keep growing?!" I had limiting beliefs and was playing small. Since then, we have 3X'd our business every year for the last 3 years, and we're going to do it again this year. And I'm here to tell you, if you want to create a much bigger vision for yourself and your business...it is 100% doable.

Of course, it doesn't happen overnight. It's highly unlikely that you will 27X your business in one year. But can it be done in 3? Absolutely. The first step is 3X, and you're already on your way.

The question to you is, are you ready? Putting these numbers down on paper has an amazing impact in driving you forward toward results and giving you a path to follow to get there.
Let's do it!

My 2016 Income Goal: $ ____________________

My 2017 Income Goal: $ ____________________

My 2018 Income Goal: $ ____________________

My 2019 Income Goal: $ ____________________

Notes:

____

____

____

____

____

You can't
live a positive
life with a
negative mind.

Whether you think you can, or think you can't, you're right.

The only thing standing between you and your goal is the story you keep telling yourself as to why you can't achieve it.

My Daily Mindset Masterplan

- ☐ Healthy Eating
- ☐ Exercise
- ☐ Yoga
- ☐ Meditation & Mindfulness
- ☐ Prayer
- ☐ Morning Routine
- ☐ Journaling
- ☐ Gratitude
- ☐ Reading
- ☐ Affirmations
- ☐ Breathing
- ☐ Goal-Setting
- ☐ Dan Sullivan's "3 Wins"
- ☐ Sleep

Notes and Big Ideas

Client Ascension Model

Ascending clients from low into higher priced programs is a science. Depending on your Value Ladder, there are a number of methods to consider including:

- [ ] Lead generation "call to action" embedded in your course.
- [ ] Mail merge follow ups to prospects.
- [ ] Private webinars to introduce clients to other offers.
- [ ] Phone calls at certain milestones.
- [ ] Referral programs.

The key isn't to do them all, although you could.

The key is having a clear picture for how you are going to ASCEND clients from one program to another. If you have a well-defined Value Ladder, it still will not sell itself...UNLESS you've thought through your Client Ascension Model. It's a proactive plan for how you will educate clients in one program about other programs, reach out to them strategically to let them know about them, and enroll a percentage of them into these higher price programs.

Ideas and thoughts about my Client Ascension Model:

____

____

____

____

____

____

____

____

____

____

Notes and Big Ideas

Catrina Craft

CEO, Craft Entertainment CFO

Craft Entertainment CFO is a business that provides business management services to people in the entertainment industry. Before working with Josh, I knew that there were a lot of people on LinkedIn, but I didn't really know how to utilize it effectively.

The biggest benefit of working with Josh's team is really having a system and a process. I didn't really know how to develop a system and a campaign so that I was consistently reaching new people. They provided a framework that I didn't have on the best method to really provide content and reach out to people and to communicate with them.

Josh and his team made me feel confident that they knew what they were doing, that they had the expertise in what they were doing. I also felt very sure that they were going to be timely, that they were going to continue to do what they said, and that the results that they indicated were going to be met.

The program has helped me focus on getting better with structure, getting better with reaching out, and being more consistent with my marketing. It has opened me up to new ideas and new ways to grow my business. I would tell someone that is considering working with Josh that I recommend it, and I have recommended him to some colleagues of mine because you get direct results.

Notes and Big Ideas

Notes and Big Ideas

DAY 3

Intention for Today (Day 3!) at ASCEND

Creating a Joint Venture Partner Network

No matter what products or services you offer, creating a network of joint venture partners who constantly refer business your way is a time-tested strategy for quickly scaling your business.

Whether you have a formal affiliate program with tracking links, or it's more of an informal referral network, making this a priority will bring a flood of new leads and clients to your door.

The first step is getting clear on who you're targeting. Often times the best JV and referral partners will be business that serve the same audience you are looking to reach. Typically these businesses will not be competitive, but complimentary. Which makes for a great symbiotic relationship!

Criteria you may want to consider:

- They sell to your target market
- They appear to be active with content marketing - If a company is regularly blogging, and their website offers a way for people to get on their email list…chances are they will be interested.
- They appear to promote 3rd party experts/partners (doesn't have to be webinars necessarily, just an indication that they are open to promoting guest content is enough to put them on the target list). This one is optional though. If you're just getting started, you might also want to find partners who are not yet very sophisticated in this area. They'll look to you for guidance and be appreciative of the opportunity!
- What's in it for them? You want your offer to have some sort of tie-back or parallel to their brand. Ideally it shouldn't be completely disjointed. When you approach them, you'll want to make it as much about them as possible…so it's important to be clear on this. You want the offer to "compliment both brands."

Ways to find them:

- Company search on LinkedIn. If the company page has status updates, it's a good sign.
- Search twitter for keywords related to the type of business you are looking to partner with. If you're looking to promote a webinar, for example, you could do searches with the term webinar, and you will likely find some candidates who have recently promoted a webinar.
    - For that matter, you can search more broadly to find companies in your space that you didn't know existed. Even if they are not promoting a webinar on twitter, the fact that they are tweeting anything is a good sign.
- Industry Associations - if you can get the membership roster, you'll have access to a lot of vendors/suppliers to the industry.
- Conferences - building relationships the old fashioned way.
- Join the communities that cater to your target partners (linkedin groups, facebook groups, forums, etc). This will give you access to a lot of potential prospects and you'll be able to see who is most active, friendly, etc.
- Google searches can yield some interesting results.

What's the benefit?

- It could be as simple as a handshake agreement to refer business to each other.
- It could be a formalized agreement to refer customers, with a percentage revenue share or commission.
- You could promote each other's content to your audiences.
- Promote a webinar.
- Promote a new product or program.
- Co-host an event or webinar.
- Get creative!

Ways to build the relationship and make the ask:

- What's your vision?
- Are we a fit?
- How can I support you?

Plan to make the ask:

- Reach out with an email to set up a phone call to discuss some ideas you have about how you might be able to work together and send each other business.
- Schedule the phone call.
- Be open. Don't assume you know the ideal outcome. Spend time getting to know their business and how they operate, and see if you can propose a partnership that fits well with their model.
- The things you have to overcome to get a YES:
    - What's in it for me?
    - How do I know it's worthy of my endorsement?
    - I don't want to overload my list with promotions.
    - Will it sell?
    - It's not unique enough.
    - My marketing calendar is full for the next few months.
    - I already offer this in my own programs.
    - One of my other partners already offers this.
    - Can I trust you?
    - Why would I promote your business, when I need to be promoting mine?
- If they say "No."
    - Is it the wrong offer for your community?
    - Is it the wrong timing?
    - How can I best support you?

Plan to stay in touch:

- Be positive.
- Don't pressure.
- Send them something every month or two, a resource or interesting article that you think they could get a lot out of.
- Look at this relationship as similar to a client prospect. You want to stay in front of them and continue building the relationship. Over time, they will come around!

Notes and Big Ideas

Tom Swip

Swip Systems

Founder and CEO

Prior to working with Josh we were at a point where we knew organizations in our sectors, but we didn't have much exposure. We needed to get the word out more, and we needed more people to know about us so we could grow and become the organization we are today.

We decided to take the plunge with Josh and his team because we knew that we needed a very structured way of getting the word out. We knew that we needed a scientific way of making sure that we reached a certain number of people to get the word out about our company. After reading through the program material and talking with Josh and Ben we knew that they had a method that could get us to the point where could expand our reach.

Josh and his team were just amazing. The biggest benefit that I see of working with Josh is that when I go to one of these real world events the people in the room already know who I am. And on phone calls with them they also know who I am and who we are because they've seen our content come through. They just have a general warm introduction to us before we actually meet.

Working with Josh's team has really made me feel that we have a sound practice in place for helping and getting connected with them in a very warm, very professional way.

It makes me feel like we are on a direction that we know we're going to get lots of connections with the kind of people that we went to work with. Aside from the leads and connections that we've been able to get through the program, it's really just made the organization feel more stable. It gives me a lot of confidence at these events and on these phone calls knowing that these people know who we are. They know what we're capable of ahead of time.

It's a great feeling to walk into a room and have somebody and introduce yourself and say, "Hi, I'm Tom Swip", and they say, "I know. You're in my inbox every day." They know you ahead of time. There's that warm introduction, and then they're more welcoming to the conversation and they're looking forward to how we can help each other out.

If you're considering working with Josh and his team and you're kind of on the fence I would say go for it. I would say go ahead and take the plunge and just get into it as soon as you can, because the quicker that you get into it the sooner you're going to be able to see the rewards.

I would just like to add that Josh and Ben have been just fantastic to work with. They're very professional, they really know what they're doing, they're always there for us, and any email or phone call, I always get a quick response. They're going to take care of you, and they're going to make sure that your company is a success.

The 3 Part Email Playbook

There are three general types of email that you'll want to have in your arsenal. Each play a different role, and done properly each can add a substantial amount of income to your bottom line.

1 . Drip and Nurture Marketing Emails

The majority of your emails should be of this variety. These are periodic emails that you send out, with no promotional message. They are simply intended to create value and build a relationship with your audience. One of the key benefits of these emails, is that they allow you to stay top-of-mind without being pushy or overly promotional. The key is that your prospects get value out of these emails! They can take the form of stories, how-to's, links to 3rd party resources, you name it. And when you include information about your business in the signature, it allows you to have that soft positioning to keep your message in front of them regularly.

Some experts recommend emailing your list every day. We've found that to be unrealistic for most business owners to keep up with, and in certain industries, it can turn off your prospects.

Currently we aim to send 3 emails per week. If you're just getting your email marketing machine rolling, 1 email per week is a good goal to aim for.

What ideas do you have for the kind of "drip and nurture" emails that you should be sending to your list:

____

____

____

____

____

____

____

____

____

____

The 3 Part Email Playbook, continued

2. Promotional Emails

As the name suggests, these are emails that will be of a promotional nature. Whenever you have a new program launch, you will need to promote the offer through email. And then, once the new program is up and running, you will want to schedule periodic promotions.

If you look at your Value Ladder, and if you have just 3 different offers, you can see how it could easily gobble up a lot of space on your marketing calendar.

Let's say you decide to promote each offer to your list, three times each year. That comes to 9 promotions throughout the year. Depending on how you structure them, each promotion could be anywhere from a couple days on the very low end, to as much as a few weeks in duration.

One thing you want to keep in mind, is that your promotional emails need to be very balanced with your drip/nurture emails discussed on the prior page. You don't want things feeling disjointed. You want a cohesive rhythm to your emails, so that it almost feels seamless. With good planning, it's pretty easy to do!

How many "promotional" email campaigns do you anticipate needing in the next 12 months?

What ideas do you have for the kind of "promotional" emails that you should be sending to your list, and what will their desired effect be:

____

____

____

____

____

____

____

____

____

3. Personal Emails

Not every email you send to a prospective customer must come from software like Mailchimp or Infusionsoft. When you really are looking for a personal response, or trying to make an intimate connection with a set of prospects, these automated tools often fall short.

People see the unsubscribe button, and they immediately know that it's just a mass broadcast. And the vast majority of them won't hit reply.

When the goal of an email is to get them to reply, you want to send a personal email. But who has time to send hundreds of 1-on-1 emails?

That's where the Email Blueprint comes in. The Email Blueprint is the final training module in The Appointment Generator. It utilizes a tool called "mail merge" to send hundreds of personalized emails, with a few clicks of a button.

Anybody can use it, and it gets great results. One application for this process is in your Client Ascension Model. For example, here's an email that we send to certain customers, to let them know about other services higher up on our value ladder:

On Thu, Mar 10, 2016 at 2:59 PM, Nick Bouras <nickbouras@linkedselling.com> wrote:

> Hi Wendy,
>
> Josh Turner and I were reviewing some of the folks that signed up for our Masterclass training webinar to see who would be the best fit for our private client program, and your company stood out to us as a great fit.
>
> I'm confident our outsourced done-for-you program will be a great solution for you and your business. With our private client program we manage your entire LinkedIn lead generation campaign for you. We've been seeing amazing results for our clients, many of them in industries similar to yours.
>
> I'd like to set up a call to discuss your business in more detail so that my team can develop a custom campaign plan that will show you exactly how we can replicate these results for your company.
>
> Do you have any time early next week to set up that call?
>
> As I would also like to respect your time, and eliminate too much back and forth, feel free to book a time on my calendar using this link:
>
> https://www.timetrade.com/book/G1PNM
>
> Thanks!
>
> Nick
>
> Nick Bouras
> Director of Lead Generation
> LinkedSelling • Webinarli
> o: 314-499-8892
> Skype: n-bouras

The 3 Part Email Playbook, continued

You'll notice that this email is very direct and to the point. Because we have so many leads (thousands per month), we have no other option but to cut to the chase, and make sure the only folks we are speaking with are definitely interested. While you are growing your audience, and your list is smaller, you may want to take a more indirect approach.

What ideas do you have for the kind of "personal" mail merge emails that you should be sending to your list, and what will their desired results be:

Notes and Big Ideas

How to Use Video to Get More Clients

with Suzanne Evans

Systems for Overcoming Adversity

with Bryan Kreuzberger

Best Practices for Outsourcing and Building Your Team

Getting to the next level is impossible to do all on your own. Yes, you can get to six figures doing it all yourself. But you can't grow beyond that if you don't have a support network, and don't start looking at areas for outsourcing and building your team.

Go back to the Suck Bucket exercise. Anything below the line, you should immediately begin planning to remove from your plate.

Examples of things that can be outsourced, and done well. Some of them quite inexpensively!

- [ ] Social media posting.
- [ ] Cleaning
- [ ] Editing and Proofreading.
- [ ] Audio and video editing.
- [ ] Content writing.
- [ ] SEO and general online marketing.
- [ ] Graphic and web design.
- [ ] Database building.
- [ ] Data entry.
- [ ] Preparing powerpoints and keynotes.
- [ ] Creating reports, meeting minutes, etc.
- [ ] Publishing blogs.
- [ ] Sending invoices.
- [ ] Basic bookkeeping.
- [ ] Personal errands.
- [ ] Sending email follow ups.
- [ ] Calendar management and scheduling appointments.
- [ ] Travel arrangements.
- [ ] Email marketing tasks.
- [ ] Social media tasks.
- [ ] Other:
- [ ] ______________________________
- [ ] ______________________________
- [ ] ______________________________

Yeah, but where do I find these people?!

Fortunately there are a wide variety of services that can help you find a dedicated virtual assistant with specialty in these areas. Or, you might turn to a service like ODesk/Upwork to find freelancers in these various fields of specialty.

Fiverr.com is also a good place to look for low-cost service providers that will have unique expertise in specific areas. Be careful though, sometimes you get what you pay for. One approach is to hire several Fiverr outsourcers for one project, and see who does the best work. Then you'll have a great option for projects moving forward that you know you can rely on.

Here are a few places to find a virtual assistant:

- [ ] Outsource.com
- [ ] Upwork
- [ ] Zirtual
- [ ] Virtual Staff Finder
- [ ] Freelancer.com
- [ ] TopTal

That sounds great, but I'd rather hire somebody full-time.

For starters, the services above can help you find a full-time assistant. But that's not the solution. Eventually you will need more than a full-time assistant. For example, my company is currently hiring for three full-time, salaried roles:

- Digital Marketing Manager
- Web Developer
- Campaign Manager

These aren't the kind of responsibilities that you turn to a virtual assistant for.

We use a recruiting and hiring process that includes a few different components, which we'll dive into on the following pages. The same could work for you.

Hiring Best Practices and Designing Your All-Star Team

Why is hiring so tough?

1. Candidates are ultimately salesmen, giving you the answers you want to hear during the hiring process but not giving you the info you need to know.
2. Many companies improvise their processes without any defined systems in place to weed out poor candidates at each round of the hiring funnel (that is, if they even have a hiring funnel).
3. Coming up with the right questions to ask candidates can be challenging.
4. Many companies ultimately do not know how to get candidates to tell them the information they need to know.
5. Many companies put too much emphasis on college degrees. College degrees by themselves are meaningless (that's right, I said meaningless) unless you have further information about the candidate to give insight into their work ethic and experience.

How can hiring be better?

An emphasis needs to be put on addressing and improving these three areas:

1. Profiling
2. Job Ad
3. Hiring Funnels

It's important to note that when looking to hire a "A" player that they are relative to the compensation you offer. Brad and Geoff Smart outline this in their book *Topgrading*. If you are hiring for a position that will pay $25,000 a year, it is completely reasonable to think that you can hire the best person at the level and get an amazing candidate in the door for your company. However it is unreasonable to think that for the same amount of money, you will be able to hire someone who is an "A" player at the $100,000 a year range.

So what is the system?

Profiling

- If you are hiring for a position that you already have on your team then model the profile of the best team member at that position. What makes your employee good at what they do? That is what you are trying to model. If you are hiring for a new position then try to model it off of a team member who works for a friend, family member or business acquaintance.
- It is important to define every aspect of the perfect candidate. Everything from experience to temperament/personality to work ethic needs to be clearly defined. You want as much detail as possible because you want to be able to tailor your hiring funnel to account for testing all aspects of your candidate.
- Make a list of all the things that you are looking for in a candidate. You could be writing down items that are more task or experience oriented like "needs to be good with spreadsheets and numbers," or "needs to be very detailed and organized with files," or you could be writing down character traits like, "needs to be very outgoing and extroverted," "needs to love talking on the phone to new people all the time." Whatever it is, you need to list everything you are looking. This will help influence copy in your Job Ad.

Job Ad

- Once you have your profile it is time to move on to writing you job ad. Writing the proper job ad is important. If you have language in your job ad that reads like this, *"Must be able to monitor and update customized internal data tracking systems on a continual basis to update team members with key metrics at times of high activity...."* then you're doing yourself and your candidates a disservice. Communicate in plain English. Just say, "Must have experience tracking data on spreadsheets." Now people know what they are dealing with. Do not get fancy with your language. Write it so that people know what you need.

- **You want to divide up your Job ad into 4 parts**
    - **The Hook -** This is your opening paragraph that is used to entice the candidate. Your goal here is to make them WANT to get this job
    - **The Job -** This is where you describe what they will be doing. Again, the needs to be in plain English. Look at your profile and see what tasks and activities are essential to the role and communicate that here.
    - **The Candidate -** this is where you describe the person you want to work with. Language on experience, desires, passions, personality etc etc will be in here.
    - **Call to Action -** What is the next step for them to take? Communicate what you want them to do next.

Hiring Funnel

Guess what? You should make your candidates WORK to get hired, not the other way around. Reading a hundred resumes takes a ton of time and it is better to create a hiring funnel that does all the heavy lifting for you.

Do not apologize for making them jump through hoops if those very hoops are going to help you determine a strong candidate from a weak one. Your hiring funnel needs to be more than just reviewing resumes to line up one phone call. That process does not tell you about enough of your candidate.

You need a process that has many steps. That's how you will know if you are getting a quality candidate.

1. An example of a good hiring funnel looks like this:
2. Round 1 questionnaire
3. Round 2 questionnaire
4. Task or homework assignment
5. Aptitude/DISC/StrengthsFinder test
6. Review resumes
7. Calls with references
8. Final Interview with candidate

Let's examine each of these areas:

Round 1 questionnaire

- You can create a simple questionnaire in a google form. You can link to this in your job ad and this can be the first step in the actual application process
- Make sure you ask basic stuff like name, email, phone number etc etc but also get into asking questions about their experience. Ask questions that will relate to the job they are applying for.
- These questionnaires could have 15-20 questions on them but that could be too much info to review if you have a ton of applicants. Ask one question that would be your "deal breaker question," meaning if they don't answer it correctly then there is no need to read the other answers and they don't move on to the next round in the hiring funnel.

Round 2 questionnaire

- Get even more detailed with the second round of questioning. Remember each round you are trying to weed out candidates

Task or homework assignment

- Try to create a task or homework assignment that could be pertinent to the job and have them do it. Depending on how high level the assignment is and how serious the position is, this could even be a paid task.
- Examples of assignments could be for the candidate to write a blog post about a certain topic or to showcase their graphic design chops by creating a certain piece of marketing collateral.
- Depending on the amount of work involved, you may need to pay them for this assignment. If you are asking for a lot of work, you should pay them. For example, when hiring a copywriter we had our final 4 candidates go through a fairly extensive exercise where they wrote several emails. We paid each of them $400.

Aptitude/DISC/StrengthsFinder test

- These tests will help confirm your suspicions about what you are seeing so far in the hiring funnel. Are your candidates smart? D they have the right temperament and skill set for the roll etc etc.

Review resumes

- Now would be the time to check out their resumes if a candidate has reached this far in the process. You should have weeded out many candidates and should be only left with the cream of the crop.

Calls with references

- Ask your candidates for three references. This will help give you further insight into the candidate. If the candidate submitted a reference then the reference should be close to the candidate and want to help them get the job.
- Do not be afraid to dive in deep with references and talk for 30-45 minutes. This can be the part of the process that most shows you who you are dealing with.

Final interview with candidate

- At this point when you finally get on the phone with a candidate who has made it this far, you should only be talking with "A" players. So this call should be more about seeing if the candidate is the right fit for your company and if their values align with yours. Not if they have the right skills.

As you can see this is a lengthy process but once set up, it takes all the guesswork out of the type of candidate you are hiring.

Each candidate should receive a score during each round of the funnel, with those receiving low scores being excluded from the next round. If done properly this will mean that each round of candidates you have moving on will become higher and higher quality throughout the funnel.

There are some great resources to check out in the area of hiring to help provide more insight and details on these processes.

1. *Topgrading* by Brad and Geoff Smart
2. *Who* by Geoff Smart
3. *StrengthsFinder 2.0* by Tom Rath
4. *96 Great Interview Questions to Ask Before You Hire* by Paul Falcone
5. *Traction* by Gino Wickman
6. Danny Iny (one of the best on this topic) www.mirasee.com

Notes and Big Ideas

Identifying What Positions You Will Need to Hire For

If you're going to achieve 27X growth, you need to start thinking about how your company will be structured.

One great tool is the "Function Accountability Chart" from Gazelles, and the excellent book on managing a fast growth business, Scaling Up.

If you are in the beginning stages of your business, this may seem like a bit much. And it's possible that not every function listed will apply to you. Make it your own, and use the tool to identify current and future needs your company will have. As Wayne Gretzky said, don't skate where the puck is now or has been in the past…skate to where the puck is going.

People: Function Accountability Chart (FACe)

Gazelles
GROWING LEADERS - GROWING COMPANIES

1 Name the person accountable for each function
2 Ask the four questions at the bottom of the page re: whose name(s) you listed for each function
3 List Key Performance Indicators (KPIs) for each function
4 Take your Profit and Loss (P/L), Balance Sheet (B/S), and Cash Flow accounting statements and assign a person to each line item, then derive appropriate Results/Outcomes for each function

Functions	1 **Person Accountable**	3 **Leading Indicators** (Key Performance Indicators)	4 **Results/Outcomes** (P/L or B/S Items)
Head of Company			
Marketing			
R&D/Innovation			
Sales			
Operations			
Treasury			
Controller			
Information Technology			
Human Resources			
Talent Development/Learning			
Customer Advocacy			
Heads of Business Units • ____________________ • ____________________ • ____________________ • ____________________			

2 Identify: 1. More than 1 Person in a Seat; 2. Person in more than 1 seat; 3. Empty seats; 4. Enthusiastically Rehire?

To download more copies and to get help implementing these tools, please go to www.gazelles.com

Notes and Big Ideas

Steve Hamm

Owner of MaaS Pros

We're an internet marketing company, so before I started working with Josh I had really just started my business just a few months prior to that. I had reached out to Josh to see if they could help me take my business to the next level.

Josh's team helped me in several ways. The first was really to get a consistent presence online… not just be on there every now and then, but it really was about that constant presence.

The other thing that they helped me do was to encourage me to become a thought leader and an opinion leader in the subject field that I'm in.

As a result of the campaign that I worked on with Josh's team, my presence grew tremendously. I was much more active in groups, I was much more active in posting and sharing content, creating content, and as a result of that my connections tripled in the time frame we were working together.

Now when people see me out, they say, "Yeah, you're that guy I saw online." From that standpoint, it has given me the recognition that I need in a very crowded marketplace.

If you're serious about taking your business to the next level, then you really need to go out and contact Josh and his team because they definitely have a well-planned out strategy to help you take your business to the next level.

Notes and Big Ideas

Notes and Big Ideas

Planning Your Next 12 Months

We've covered a lot over the last few days. The key now is taking what you've learned, identifying the opportunities that are the best fit for your business and mapping out two areas:

1. With the changes you are going to make, what will your projected sales goals be for the next 12 months?
2. What "Major Initiatives" will you need to plan, in order to reach those sales goals?

On the next page, there is a template for you to use, to plan for these two items.

On the following page is an example of what it might look like once filled out.

1 Year Plan Template

	2016							2017					
	June	July	August	September	October	November	December	January	February	March	April	May	TOTAL $

Projected Sales (Value Ladder):

Plug in the projected sales from each of your product/service offerings in the cells below:

	June	July	August	September	October	November	December	January	February	March	April	May	TOTAL $
a.____________________													0
b.____________________													0
c.____________________													0
d.____________________													0
e.____________________													0
TOTAL $	0	0	0	0	0	0	0	0	0	0	0	0	0

Major Initiatives:

Place an X in the cells below to indicate when you will begin to implement each initiative that you are planning:

	June	July	August	September	October	November	December	January	February	March	April	May
1.____________________												
2.____________________												
3.____________________												
4.____________________												
5.____________________												
6.____________________												
7.____________________												
8.____________________												
9.____________________												
10.____________________												
11.____________________												
12.____________________												

1 Year Template Example

	2016							2017					
	June	July	August	September	October	November	December	January	February	March	April	May	TOTAL $
Projected Sales (Value Ladder):	*Plug in the projected sales from each of your product/service offerings in the cells below:*												
a.New $97 Training Program			1,940	970	1,067	1,174	1,291	1,420	1,562	1,718	1,890	2,079	15,112
b. 1-1 Coaching Clients	3,000	3,000	3,000	3,000	3,000	3,000	4,000	4,000	5,000	5,000	5,000	5,000	46,000
c. New Group Coaching Program						3,000	3,000	4,500	4,500	4,500	4,500	4,500	28,500
d. Done-for-You Services	1,000	1,000	2,000	2,000	4,000	4,000	4,000	8,000	8,000	8,000	12,000	12,000	66,000
e. New $997 Training Program									9,970	4,985	4,985	4,985	24,925
TOTAL $	4,000	4,000	6,940	5,970	8,067	11,174	12,291	17,920	29,032	24,203	28,375	28,564	180,537

	June	July	August	September	October	November	December	January	February	March	April	May
Major Initiatives:	*Place an X in the cells below to indicate when you will begin to implement each initiative that you are planning:*											
1.The Appointment Generator	X	X	X	X	X	X	X	X	X	X	X	X
2. Build Email List and Social Media	X	X	X	X	X	X	X	X	X	X	X	X
3. Email Marketing	X	X	X	X	X	X	X	X	X	X	X	X
4. Sell & THEN Create $97 Course			X	X	X	X	X	X	X	X	X	X
5. Create Webinar for Leads					X	X	X	X	X	X	X	X
6. Launch New Group Program						X	X	X	X	X	X	X
7.Sell & THEN Create $997 Course									X	X	X	X
8. Hire Virtual Assistant				X	X	X	X	X	X	X	X	X
9. Hire Marketing Coordinator							X	X	X	X	X	X
10. Facebook Advertising				X	X	X	X	X	X	X	X	X
11.Start Writing my Book												X
12. Begin JV Network Development									X	X	X	X

Notes and Big Ideas

As you think, you travel, and as you love, you attract. You are today where your thoughts have brought you; you will be tomorrow where your thoughts take you.

James Allen

3 Year Vision

Having a clear vision for your next 12 months, as per the example on the previous page, makes it so much easier to visualize what you can achieve.

Not just in the next year, but the following years as well!

Based on your 1 year plan and your future growth goals, now might be a great time to take a fresh look at your big picture goals for the next 3 years.

My goals:

2016: ____

2017: ____

2018: ____

2019: ____

Be bold and don't hold back! Remember, the only thing standing between you and your goals is the story you tell yourself as to why you can't achieve it. Limiting beliefs, we ain't got time for you no more!

My team and I, we would love to support you in reaching your goals. I'm hopeful that ASCEND has been the first step for you in reaching for those goals.

By seeing through the vision that you've created over the last few days, the coming months will bring massive breakthroughs and success for you!

Notes and Big Ideas

Your time is limited,
so don't waste it living
someone else's life.

Don't be trapped in
dogma - which is living
with the results of other
people's thinking.

Don't let the noise of
others' opinions drown out
your own inner voice.

And most important,
have the courage to follow
your heart and intuition.

Steve Jobs

Notes and Big Ideas

Notes and Big Ideas