

Welcome back to the Customer Experience Planning Workshop. And today, I just want to show you a tool that we use and a process that we use to plan customer experiences. And I'm, in fact, going to go ahead and plan out very transparently the launch that we're doing right now of the Customer Experience Lab, which is a training that we run that helps business owners like you execute the planning and building of successful marketing systems.

And so the thing about a planning tool is that it has to be easy and we have our own little planning tool here, which is really fantastic and here is how it works. So typically, you're going to start with a traffic source, okay? And so you'll probably have social media, you'll probably have some paid advertising. The keyword planner and the blog planner, these are really if you're going to do content marketing and proactive SEO. I don't do a ton of that in my normal fast promotions. SEO is a longer term strategy, in most cases. We'll probably send an email or some emails and I'm not going to include chats right now.

We're going to email our existing list, okay, and tell them, Hey, you got to check this out. We're going to run some paid ads and we're going to post on social media and those are going to be how we will drive traffic into our offer.

Now, if you've got other things as well, there's nothing stopping you from under actions, doing a custom action, which can be that you're driving traffic in from a magazine ad or that you've got a billboard that has a phone number on it. You know, there's no limit to what you can plan here in terms of a journey and how we can track that.

So again, in our case, we are largely a digital agency and we stick to online advertising. So we're going to send some emails, put some ads out and do a social plan. And for that matter, while we're actually, we're not going to do a multi-tiered ad plan. We're only going to advertise this particular time on Facebook. I'm not going to do Google ads this time around. And I I now have my traffic sources on the social plan. I can actually drag in multiple ones. So I can say, I'm going to advertise on Facebook and Twitter and LinkedIn. We don't really have enough of an Instagram presence yet to matter. You know, so I've got these three inside my social plan.

And we're going to drive traffic. Eh, where are we going to drive that traffic? Well, we're actually going to drive it to the page that you landed on when you signed up from one of our ads or joined us from email. So we're going to actually send traffic to a landing page that needs to be created for this particular course.

And so now I'm going to go ahead and I'm going to drag these traffic sources in, and I have a landing page. There's some cool stuff in here. I'm not going to go super in depth on the technical. But if I click on view, I can actually throw a URL of the page down here so I can even build out blank pages and throw the URLs in and then I can see the pages right inside here. I can keep it to do list on what has to be done to finish them and I can actually visualize the whole funnel in a row.

So what happens after you go to my landing page is that you fill out a form that says you wanted to see these videos. And when you fill out that form, you go to another page, which is a thank you page. And everybody goes there. And from the thank you page, we also now put you into an email sequence where we follow up with email and we're like, Hey, check out our video. And then the next day, which is where we're at right now. So if you're watching this, you're on day two.

So let's go ahead and just look in the email sequence and let's talk about this. We've got a welcome to the Customer Experience Planning Workshop. Okay. And that was that overview, the nine step overview that we went through yesterday. And then I'm going to go ahead and you don't have to do this because this is not marketing automation software, but I'm going to say, wait, one day, right, and then I'm going to send another email and this email is going to be called, I'm going to have to write the actual title of this later, but fundamentally it's, and this is why it's a planning tool. I'm going to say, learn how to plan an experience and well, let's call it a planning software overview. Okay.

So now I've got a, and if you don't use software, if you're not going to use software to do this, you can do this on paper, but this is the idea of what you want to get down. So I'm going to wait a day. I'm going to send you this video that you're watching now about this software. At the end of this, I'm going to make a really fantastic offer to you, to get on the phone live with me and have me help you build this out for your specific case for free. But if you don't take me up on

that, you'll still be in this sequence. Okay.

And so I'm going to go ahead and I'm going to wait another day and I'm going to email you and be like, are you crazy? You really should have booked a call with me. And so I'm going to write another email there. And if you go to edit on these, you can actually write the subject line and the purpose and the body so you can actually start creating your whole plan in here. I'm just trying to get an outline right now.

So, let's see that this can we talk book a call and then I'll probably go ahead and slightly give up on you. So I'm going to go ahead and wait two days and do some sort of kind of peer pressure thing, say it's a final reminder, and then I'm not going to talk to you again. Okay. So you've got some emails to look forward to. You can see here you're going to get these.

And so now what happens if after this, immediately, you go ahead and you say, Hey, I got to talk to this guy. Well, what is that? That is back to a landing page and you can name these pages. So I'm going to go ahead and name this one, book a call. Right? And if you book a call with me, then you are going to get a thank you page. And that thank you page is going to give you the details that you need for when the call is, what you need to do, how to show up for it. And I'm going to drop you into another email sequence.

Now, if you've ever used marketing automation software, you know that as you move along a path like this, you're taken out of the previous sequence, right? So all the emails harassing you to book a call with me, go in this sequence. As soon as you book that call, this sequence stops and this one starts. So we just moved through it in that way.

And so the, okay. So what else am I going to do? We're going to have you book a call and we're going to thank you for booking a call and we're going to put you in an email sequence that I'm not going to write out that reminds you to show up for your call.

And then we are going to talk. So I'm going to keep going over here and I am going to grab an action. What do I want to do? More tools? Yeah, I'm going to do an action. I'm going to do a custom action, which is basically that you show up on a phone call with me.

So this email sequence, you've already signed up for the call. We've got a date. I'm just reminding you to show up with me. I'm going to go ahead and pick a little icon that says phone and I'm going to pick one that I like, and so now we've got a phone call.

And from that phone call, we are going to basically attempt to sell you in to the Customer Experience Lab, which is a month long workshop where we walk through all nine steps. So not just this, but actually the market research and the identification of your avatars. We're going to talk about where to find your people and we're going to write your copy platform, and we're going to create this map and we're going to discuss how to build your website and how to get it built, if you can't do it. And we're going to talk about how to make sure your automation is correct and what to check for before you launch and how to build your ad platform, right, interactively, so that you can have help because it is kind of complex.

And so that's what we're moving towards here. So in order to move you towards that, we're going to get on this call and we're going to do a setup for you and we're going to say, if you want to continue with this deeper, do you want to join us for the Customer Experience Lab? We're going to try to close you right then and there. However, we're going to send you to a sales page so from there, you can go to the sales page.

Now, I'm going to say this. Let's say you never book a phone call. I don't want to write you off. So I'm actually going to go way back to this email sequence and can we talk, final reminder, in these emails after the first two, I am going to say book a call, but maybe I'll add one more email here. And maybe in final reminder, I'll also mention that if you want to learn more about what we're doing over all, you can check out our Customer Experience Lab page and so some of those people will also pop down here.

Now, you can get picky if you want to, if you need to visualize this, let me actually delete this guy just for easier

visualization. Let's make this come right off the bottom here. That's better. And now we can actually move this back up and have less of a mess.

So people might come from this email sequence to the sales page. People might come from our phone call to the sales page. From the sales page, they're going to click on an order button and they're going to go to an order page. People might go from our phone call straight to the order page. Okay. That's a possibility. And they might go to our sales page first and then click through to our order page. That's also a possibility. And from the order page, once they've placed the order, we're going to give them one final thank you page welcoming you to the course and that I believe pretty much sums up the experience that we are going to walk you through from day one, all the way through you becoming a Customer Experience Lab buyer.

Now, let's talk about numbers. So you'll see that all of these have little numbers. The very first thing I'm going to do is my last number. I'm going to go in here and I'm going to add a new product called Customer Experience Lab. And we are changing our offer. We've done this before at \$3,000. We are doing a really amazing discount right now to about 500 bucks because of the economy and also because we took out some pieces. We found that some of the really advanced technical training we were doing with people was too much and so we're taking that out and making this really for business owners and not for technicians. And then if you want to work with our tech team, you can, separately. Okay. So you can save your money on the course. And then if you decide you want to work with our tech team, you can, but we're not going to wrap that in. We're not going to force you to work with our tech team for setup. So we're just going to do the planning part of this.

And so, yeah, so basically that is the deal. We have one price point, one product, and you'll see that because we came from an order page, it puts a little dollar sign on it, and you'll see what this does in a second. So let's go all the way back to the beginning now and this is where this stuff gets exciting.

We have an email list of a couple of thousand. And in fact, we also have some folks who are going to email for us. Ah, let me go ahead and go back to campaign apps and they see what I've got, chat email, blah, blah, blah. Nope. I'm going to go to more actions and create a custom media type. Okay. And my custom media is affiliate referrals because we have affiliates who are going to tell their people about this for a percent of profits. And so I can go in there and I can choose an icon, like there's nothing for affiliate. So I'm going to look up like share and this is kind of the idea of people who want to refer us. So they're going to refer people in and so let's talk about our numbers.

From our own email that we know is going out, we have a very small email list. We've got about 2000 people. And let's say that our open rate on 2000 people is 20%. That brings us 400 people. And of the 400 that open, let's say we've got a 10% click through. That means that we're likely to gain 40 visitors from our own email list. Okay.

And now we're going to advertise on Facebook and I can get as many visitors as I want that way. So let's say that we're going to commit to having at least 5,000 people come from paid advertising to see our stuff. And then we've got a social media posts and like literally I'm going to put five. We don't put a lot of effort into social and we don't reap a lot of rewards from social and that's just how we roll because we find it much easier to focus on paid advertising and affiliates.

And so let's say that we get two to three lists to promote us, and that collectively they've got 20,000 people and that they get a 20% open rate, which is 4,000 people. And if they get a 10% click through, which is 400 people. So from affiliates, we're expecting to get about 400 clicks onto our offer. So now we've got about 5,445 people who are going to hit this landing page. We're pretty good with landing pages. And so we're going to assume that we'll do well.

And, but we're also going to go conservative on it so that we can so that we cannot overestimate our ability to deliver. So I'm going to go ahead and put 30% opt in rate. So of the hundred people that see our landing page, I'm going to assume that about a third of them are going to go ahead and take us up on the free training that the thing that you're participating in.

Now, we sometimes get 50 or 60%, but I always prefer to estimate low and round up after I'm performing really well then to estimate really high and feel like I've failed when I'm not meeting my goals. So we'll also see how to adjust these in just a second and this is important.

So now, I've got 1600 people, okay, that go into this email sequence. And of those people, let's say that about 10% of them are going to go from one of these emails straight to the sales page. And let's say that about, I'm going to go with 40. I actually want to say 60%, but the 40% of the people who actually take the time to opt in, get my emails and watch these videos, that a little less than half of you are going to be like, Holy cow, we really need to go forward with this.

And I take it back. I'm going to even take it down to 10%. I'm going to take it down to 10%. So 10% of people who watch this video right now are going to decide that they want me to do this exact process for their business, with them, for free. That's impossible. It's going to be at least 20%. Okay.

This is a guessing game, right? So let's say that it's 20%. Again, we can adjust this in a second. They, that even make it to the book of call page. Ah, I take it back. I'm sorry. This is where I want my 20%, is that 20% of the people actually book a call. From the email sequence, I think we're way more likely to get like 70% of people to go and visit the book of call page, to go see what the offer is about. So that's what we're mainly pushing. So most people will go there. Some people go here and that leaves 20% of the people who are just like watching my videos. And they're like, I never want to hear from this guy again. Okay. So that's cool. Don't mind.

They hit the thank you page. They go into this email sequence and I guess that this also assumes that once we got these 229 people are going to get on the phone with me. Okay. There is going to be attrition between here and I don't have a way to account for that in my numbers. So that's okay. And I can always dial down these estimates if I need to, but basically we're going to assume that if you book a call, you will show up. That may or may not be a good assumption.

Now, after we do a phone call, I am going to, again, assume that approximately half the people I talk to are at least going to go look at my offer, right? So maybe I talked to you and we do this for your company. You're like thanks so much. That was awesome. Never going to talk to you again and we're done, but at least half of you will probably be like, Holy cow, I got an amazing value. Could this guy help me? Let me go see what he's offering and you're going to check out my sales page. Right?

And so then you're on the sales page and let's say that on a sales page, about 25% of you are going to carry on and click through the order page, even if it's just because you're curious and you know you're not going to buy. We're going to get some clicks views. And also, I'm going to get about 5% of people to go straight from my call to the order page, because we're going to be on the phone and you're going to be like, I am so in and I'm just going to send you a link to the order page and we're done. So that's 11 sales there.

And this is 70 people who are going to see the sales page and click through to the order page. These guys are going to convert at almost 100%, because they're literally just going to buy. The guys who look at the sales letter and then end up on the order page, will maybe convert a little lower, but I'm still going to assume that my order page is going to have only about a 25% abandonment grade. Okay. So 75% of the people that are brave enough to click on buy now are going to go ahead and fill out their credit card info and buy. And 25% are going to click buy now, have some sort of like, Oh my God, is it for me? Is it the right time? Do I have the money? And they're going to back out. Again, cool. And so, and we're going to send them to a thank you page.

Now, we're going to generate \$30,000 in revenue. Okay, if these numbers hold up at all. And I've been doing this for a while and I am going to guess that my numbers will hold up and I would be happy to send you a followup in the future and let you know how the numbers actually pan out when this is done.

But the, so that's our estimate based on driving 400 visitors from affiliates, five visitors from social, 5,000 from paid advertising and 40 from our own email lists. And obviously there'll be some difference, like from our own email list, we're probably going to convert a little higher so all of this has to be averaged out. From cold advertising, we're going to convert lower. From affiliates, we're going to convert somewhere between the two, a little higher than advertising, but lower than email, because affiliates is really kind of like a warm referral. It's going to be friends of mine saying, Hey, I've taken this class, you've got to do it. Or, you know, I've worked with Justin. He's great. And that just results in slightly higher conversion rates.

Now, there is the plan. The very cool part about this is that if you do decide to join us, we will give you access to this and you can actually turn on a live mode and get a tracking code that you can install on your website and we'll be showing you how to track also from email using Google's own built in system. It's a very stable way of tracking. And so we're going to track all the way from every social link, every email link, every organic click, all the way through, and we're going to be able to compare our plan to our live and see how we did.

And the cool thing about that is that once we go live and we're rocking through here, if I thought that 70% of people who went through this would actually go look at my book a call page and only 10% do, then I know that my problem is that my emails suck and I have to make my emails more compelling so that people want to go look at my book a call page. If I send people to book a call and like 0% actually book a call, I've got to fix my page because I know that that's my weak point. So by using a visualization system like this, I can now identify exactly what goes wrong because I've estimated what I believe is possible with my known traffic sources and my known ability to create landing pages and sales letters that convert well. I have now something to benchmark against, which lets me find the bottleneck in my funnel and instantly kill it.

So without further ado, if you guys want me to do this with you, what I need you to do is go ahead and go to the book of call page and apply for a call with me. And when I say apply, there's a step. You cannot just go book a call with me. What I need you to do is write down for me a couple of things. I need to know what's your product. Is there a place I can see it online? You'll find all of this on the book of call page. Don't worry. You don't have to take notes right now, but you should know that you need a little bit of homework.

I need to know if you've got opt-ins. I need to know if you have something free that you give away. If you have more than one free thing that you give away, and if you've got any numbers behind that, I want you to prepare a little doc for me and you're going to send it to my email or share a Google doc or paste it into a form right on the book of call page, however you want to get it to me. You're going to give me some data about what you're doing right now and what your products are and what your free offers are.

And you're going to try to tell me the story of what your current system is, because I just did this in some amount of time. I'm not really sure. It's probably been what, 20 minutes, half an hour, but I also know what I'm going to do and I don't know what you're going to do. So if we're going to get on a call for 45 minutes and you want to walk away with an understanding of what's going to happen, one of the most common things that happens here, right, is that you've got a relatively big audience, but with low conversion rates and a low price point offer, and you can't make it work, because you have to consider this.

Over here, for 5,000 visitors to my site, let me just open a calculator real quick and let's look at this. For 5,000 visitors to my site, if I multiply that by four, that's \$20,000. Okay? So if my traffic is going to cost me four bucks a click, I really am only making \$10,000 over here.

Now, that's okay. That's okay, in this particular case, because this is a group coaching thing and I'm generating new leads for my business. I'm generating lifeblood for my business. You guys might want to work with us in the longterm to help you build out your funnels or to build marketing campaigns as an agency. All of this is great. So I can spend that 20 grand plus our price point is high enough that we're making it.

If my price point, case in point, if I was a, I'm going to go back to plan. I'm in plan. Hello. If I went in here and I said, actually, this is like a \$47 course. All of a sudden I would have just spent 20 grand to make \$2,800. I would have lost \$18,000. Okay. And that is not an uncommon scenario. When you think about your business model, your products, your pricing, and how you think people will move through stuff, one of the most common things that happens is we find that your funnel is not profitable and that's what we're really going to do. So I want you to bring as much to the table so that we can map this out as quick as possible so that then if your funnel is not profitable or if it's not as profitable as it should be.

Now, I intend to get clicks at a buck. So really my 5,000 clicks is five grand. So I'm going to make \$25,000. That's way better. Okay. But even if it was \$4 a click, I'd be okay and we'd be able to run the course and we wouldn't lose money. And it's cool.

And so this is where we want to get you, is to know that as you mess with these numbers, even in a pretty bad scenario, you're going to be fine. And in a good scenario, you're really going to make a lot of money. Right. So that then we can start advertising and then we can see like, let's assume that day one, it's always the worst case scenario.

So let's say that day one of my ads, I'm paying four bucks and I'm even getting like slightly lower conversion rates. I'm still not going to lose money. I might break even. Okay. And it's not even break even because what am I doing? I'm paying for leads. So I've got 1,600 new people on my email list at the end of the day. So if I break even, I'm actually profiting 1,600 subscribers.

I still don't want to do that. I still want actual cash, as well as subscribers. So, but you can know that I can lose some conversion rate. I can have a really expensive ad spend and I can still break even and add some new people to my list so that I feel safe, safe enough to go spend \$5,000 on Facebook. Right. Which otherwise I might feel like, Oh, let's put a hundred bucks into it or let's put \$200, because I'm not sure if it's going to work. And Oh, look, now I've got proof. It doesn't work. My first \$200. I didn't make any sales and it costs me like or I only got 50 leads and I didn't make any sales and I spent 200 bucks. So if I spend \$2000, I'm just going to fail.

You get this like really insecure thinking and bad logic and we don't want that. So this gives us confidence to say, okay, well, we can go mess with numbers. Let's project a worst case scenario. Is that okay? Is that feasible? Is it worth the risk? Let's project the best case scenario, like holy cow, what could we do if we did this well? You might find out that your offer is not good enough. You might find out that your product is priced too low. You might find out that you aren't generating enough traffic from the sources. You know, and this is what you really need to get a grip on is what is this whole picture of your people from beginning to end? What are they going to go through? And what's it look like?

So in any case, go ahead and right under this video, you're going to see a button to book a call and you should, so go ahead and book a call. I look forward to talking to you. It's first come first serve. If my numbers pan out like this, I'm probably going to cut advertising off earlier because I actually cannot possibly bust 230 calls out in the next couple of weeks, right? So I'm not even going to pay for 5,000 people.

The reality is that that's that, and I'd love you to be one of the people I talk to. If we get our call capacity filled up and can no longer do it, we're just going to be shutting it down. So this is a first come first serve thing. Book a call. I look forward to talking to you and planning out your funnel. It's a no commitment call. I'm not going to high pressure you. And if it works out well for you, I invite you to check out the Customer Experience Lab and join us.

Starting on September 1st, we will be doing this version of the Customer Experience Lab and doing a 30 day experience really aimed at spending 30 days with you guys, not just mapping this, but actually building it and perfecting your messaging and your copy and your audience and getting your marketing set in a way that it will support for your business for years to come. We're going to do this foundational work that will be great. So I hope that you do choose to join me and I will talk to you soon.