A Proven 5-Step System to Retain Happy Clients so That All of Your Marketing Efforts Payoff

Program & Membership Delivery MindMap

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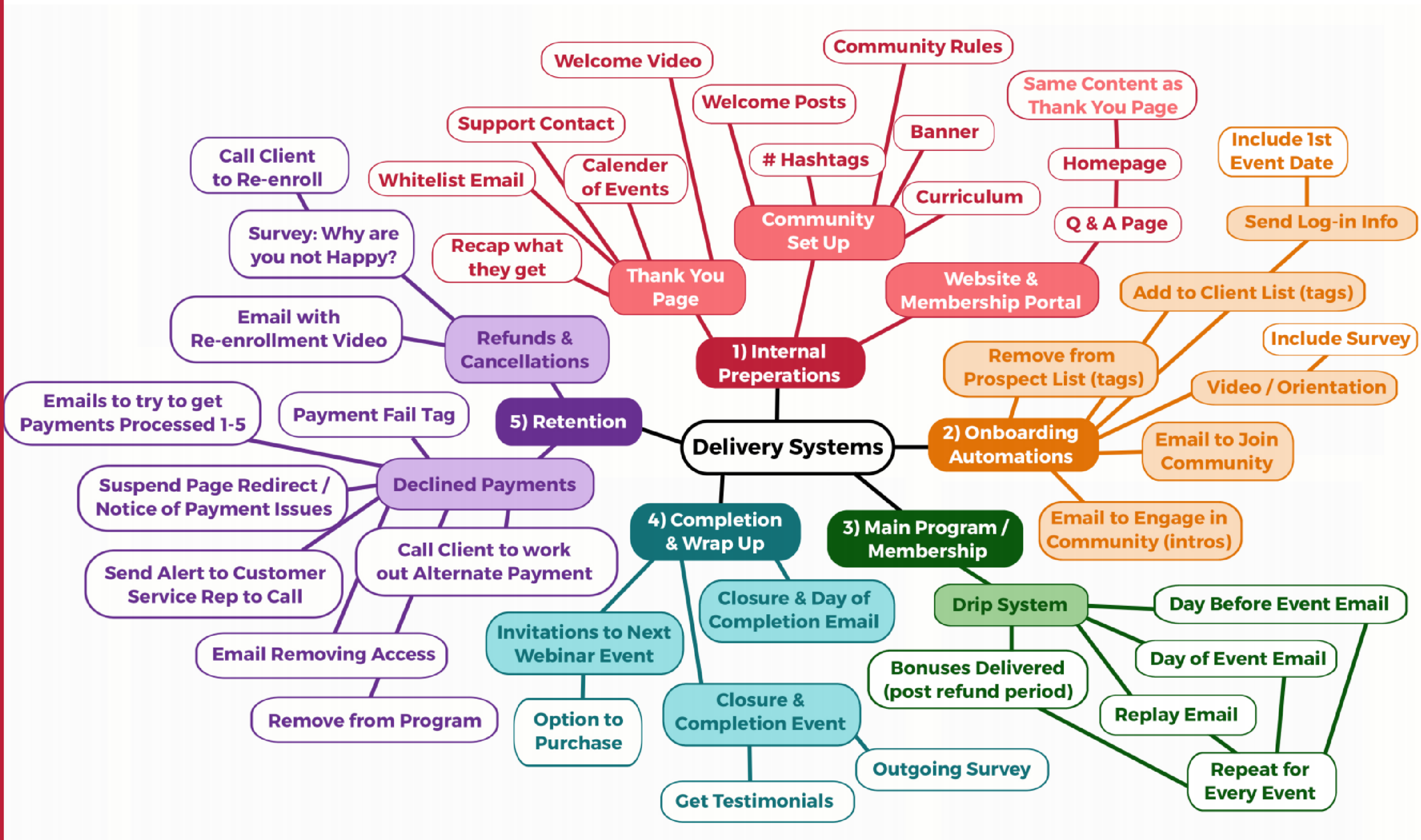
Delivery Systems
1) Internal Preperations
Thank You Page
Welcome Video
Support Contact
Whitelist Email
Calender of Events
Recap what they get
Community Set Up
Welcome Posts
Hashtags
Community Rules
Banner
Curriculum
Website & Membership Portal
Same Content as Thank You Page
Homepage
Q & A Page
2) Onboarding Automations
Include 1st Event Date
Send Log-in Info
Add to Client List (tags)
Remove from Prospect List (tags)
Include Survey
Video / Orientation
Email to Join Community
Email to Engage in Community (intros)
3) Main Program / Membership
Drip System
Day Before Event Email
Day of Event Email
Replay Email
Repeat for Every Event
Bonuses Delivered (post refund period)
4) Completion & Wrap Up
Closure & Day of Completion Email
Invitations to Next Webinar Event
Option to Purchase
Closure & Completion Event
Outgoing Survey
Get Testimonials
5) Retention
Refunds & Cancellations
Call Client to Re-enroll
Survey: Why are you not Happy?
Email with Re-enrollment Video
Declined Payments
Emails to try to get Payments Processed 1-5
Payment Fail Tag
Suspend Page Redirect / Notice of Payment Issues
Send Alert to Customer Service Rep to Call
Call Client to work out Alternate Payment
Email Removing Access
Remove from Program

Internal Preparations (Stage 1)

This check list has the items you want to have completed before you start selling you program or membership.   Each element requires:

	Thank You Page	
		Welcome Video
		Recap What they get
		Link to the Community
		Calendar of Events
		Whitelist Email
		Support Contact info
		Intake Survey or Assessment
	Community Platform Set Up (Facebook group)	
		Banner
		Community Rules
		Welcome Posts or Path
		Hashtags
		Events
	Hub / Delivery Portal	
		Welcome Page (Repeat of Content on Thank you page)
		Module Page(s) / Lesson pages
		Q&A Page(s)

Onboarding / Activation Automations (Stage 2)

This check list has the items to help your clients get acclimated to the program, help them find what they need, and have a great experience in the program. This stage sets you and them up for success for a long term relationship.

	Automations: Adding & removing tags, campaigns or sequences	
		Remove prospect tags, and remove from prospect sequences
		Add buyer / client tags, add to client sequence
		Onboarding Video (if more needed than welcome video)
	Emails in Onboarding Sequence	
		Email #1: Welcome with Hub / Portal Log in information **(include first event info)**
		Email #2: Join the Community info
		Email #3: Did you get these?
		Email #4: Reminder about Survey
		Email #5: Did you Introduce Yourself

Program & Membership Delivery (Stage 3)

This check list is designed to help increase attendance and engagement with your program or membership. Our goal here is to have our clients consume content and take the next right actions on their journey.

	Automations	
		Add tags, or triggers for module delivery by dates
		Run Http Posts, or communications connections between systems
	Event Related Emails (repeat for every event)	
		Email #1: Module Coming Out (This week, Tomorrow, Monthly)
		Email #2: Today is our Module
		Email #3: Access the replay here
	Live Coaching / Mastermind Event emails	
		Email #1: Coaching Coming Up (Zoom, phone, access info)
		Email #2: Coaching Today in (15 minutes, hour)
		Email #3: Access the replay here

Celebration & Completion (Stage 4)

This check list has the items to help your clients get clear on what they have accomplished to help reinforce the progress that they have made.   It can really help them celebrate, and see how well the program got them towards their goals. This can also create completion around what they have or haven't done inside a program, so they don't have any leaking energy. This also sets the stage for your next offer if you have one.

	Closing Session	
		Email #1: Announcing Closing Sessions
		Email #2: Day of Closing Session
	Outgoing Survey	
		Create outgoing form
		Email #1: FIll out the outgoing form
		Email #2: Reminder to those who haven't completed the form
		Collect Testimonials for feedback
	Next Offer Opportunity (webinar, sales video, consultation)	
		Email Announcing Next Offer opportunity (webinar, FB Live, etc)
		Email Delivering Next Offer Event
		Email with Deadlines to Join Next Offer

Retention (Stage 5)

This check list has the systems and emails that can support you in keeping clients on track with payments if they have card issues. It can also help them if they get confronted and wobbly or if they want to back out. If it is fear, this gives you an opportunity to re-enroll them in the possibility they saw when they signed up.

☐	**Declined Payments**	
☐		Action: Create Trigger for declined payments to start email sequence
☐		Email #1:IMPORTANT - Action Needed RE Your Declined Payment
☐		Email #2: Second Notice - Action Needed RE Your Declined Payment
☐		Email #3: URGENT - Please Update Your Payment Information
☐		Email #4: URGENT - Action Needed to Keep Your [Program]
☐		Action: Set Up redirect - to lost access page
☐		Action: Alert to Customer Service to reach out
☐		Email #5: NOTICE - Suspension of Access
☐		Email #6: IMPORTANT - Your Account Remains Due
☐		Email #7: URGENT: Last Chance to Keep Your Program
☐		Action: Remove & Tag as Delinquent
☐		Email #8: **IMPORTANT:** You have been removed
☐	**Cancellation Process**	
☐		Email from Customer Service: Respond to cancellation
☐		Email: We haven’t heard back
☐		Email: Send Exit Survey
☐		Email: Confirm Cancellation

Retention (Stage 5)

This list helps them if they get confronted and wobbly or if they want to back out. If it is fear, this gives you an opportunity to re-enroll them in the possibility they saw when they signed up. The last list can help you from loosing potential sales … especially for those who get distracted during purchase.

☐	**Refunds**	
☐		Email 1: Respond to refund request
☐		Email: Yes a Refund is available
☐		Email: No Refund is available, see our Terms of Service
☐		Refund Survey
☐		Email: Confirm Payments return for refund
☐	**Abandoned Cart**	
☐		Email #1: Oops you forgot something
☐		Email #2: Having Issues?
☐		Email #3: $$$ Discount is a few clicks away
☐		Email #4: Discount expires in 2 hours

Love then Lead

⭐Create sustainability bringing the light, energy, and joy to keep you moving in your business in a happy productive and fun way.

✨Gain clarity on the focused actions that give you more time freedom, to do what will have the best impact on your business.

🔮Become crystal clear who your ideal community members are, and the niche you serve so that community-building efforts turn into people excited to buy. They will know you are speaking directly to them in their hearts.

💰Shift your relationship with money to that of a trusted business bestie, so you can welcome her in with open loving arms.

🪄Design magical offer, you will then be ready to hear yes, and make sales.

❤️Open up to the opportunity to meet potential right-fit collaborative partners with similar values and hearts – the peanut butter to your chocolate🍫.

You'll learn how to create win-win opportunities to expand your impact and income.

Find out more today: https://meredithcanaan.com/membership/