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**SN Template: GDTB Strategy Session Meeting Guide Template - Systems Vault**

1. Review discovery call notes (Ontraport)
2. Review the client questionnaire (Ontraport)
3. Listen to what the client needs, set their expectations, get everyone on the same page.
4. Who is on their team. Who is missing from their team?
5. Narrow it down to 3-4 goals/projects that we’ll be helping the client with for the first 3 months. Project timeline and when will milestones be completed.
6. Set the next call (try to make it recurring)

**By the time you get on the call the client should have:**

1. Decided on the project management tool // Signed up for Teamwork (using our affiliate link)
2. Shared Wordpress Deets
3. Shared Analytics
4. Shared their list of influencers
5. Decided which key team members are needed // shared team member details with us

**This client intake worksheet is split into 3 categories:**

**GOALS** – what does the clients/business want?

**PLANNING** – what do YOU need to do to support those goals?

**GATHERING** – learning all about the business.

**GOALS**

**1. What goals do you have for your business?**

* What do you want to accomplish within the next 3 months (and overall in the year- roughly, big picture)?

This can include revenue goals, list building goals or launch/promotion goals.

**2. What strategies or plans do you have in place already to meet these goals?**

Ask about marketing, launches and other activities they are currently working on or considering so you can start to plan to support them.

**3. What do you consider to be the top 3 to 5 priorities in the next 90 days?**

This will lend itself to creating clear measures of success for this timeframe.

**4. What do you want to see come off YOUR plate immediately? Within 30 days? Within 90 days?**

Get clear on what needs to come off your client’s plate

**PLANNING**

Now that you know the goals you can start to work on breaking it down into priorities & steps.

**5. Identify Your Top 3-5 Project Priorities for the Next 90 days**

Based on the answers above – what projects do you need to focus on for the next 90 days?

**6. Identify Top Priority Action Steps for Each Project**

**7. Identify Your Top 3-5 Marketing Activities for the Next 90 days**

**8. Identify Top Action Steps for Each Marketing Activity**

\*\* Transfer Project and Marketing Priorities Into Your Calendar So You Have Time to Focus on Them! \*\*

**9. Plan for how to clear your client’s plate. What needs to come off immediately? Later? And who is going to do the work instead?**

**10. Identify any obstacles that could possibly get in your way? These could be about the current status of the business, client challenges, team, your own concerns, etc.**

**11. Identify at least one way to move through these obstacles.**

**GATHERING**

**You need to gather key information about the business. TIP: Be sure to centralize this information in the virtual office as you gather it (or make note to add it once the virtual office is setup!)**

**12. What CURRENT revenue streams are in place? (sales funnel)**

Include details such as pricing, availability, webpages and other materials/resources. Services Products

**13. What WEBSITES are in place?**

Get to know all the websites that your client has including main/home website, blog sites, sales pages and squeeze pages.

**14. Who is currently on the TEAM?**

Make note of all ongoing/dedicated people (virtual assistants and such) as well as any project based people. Briefly outline what each person is responsible for.

**15. What TOOLS is your client using?**

Gather list of all software tools including logins.

**16. Systems Analysis Use the following checklist to gather information about your client's business.**

**Backup Systems**

This is #1 for a reason – the files are the biz!

* Automated backup for all files on everyone’s computers (biz owner, team, etc) – I use and highly recommend www.dropbox.com
* Centralize ALL team files – Have people load them up to the virtual office
* Websites & databases – Have someone do a backup once a month (VA)
* Backup for when people are away – vacations, illness – The SOP Guide will allow backup of tasks & responsibilities

**Money Systems**

If you aren’t consciously taking care of the money the business will struggle

* How is money coming into the business? (Automate) – Payment systems, shopping carts, merchant accounts, etc.
* Tracking payments (WEEKLY) – NEED a system to track declines, collections (VA) – Spreadsheet to track payments on higher end programs
* Cashflow & Expenses – the flow of money in and money out
* Bookkeeping & Accounting – a must!

**Metrics Systems**

Metrics let you know what is going on in the business – so key! (WEEKLY)

* People numbers – prospects (list) & customers
* Sales – products & services
* Promotional stats - conversions
* Website traffic
* What your goals and targets are.
* The change in all of the above.

**Marketing Systems**

Lead Generation - the heart of marketing systems is 'how do people find the business, get exposed to what the business offers?’

Will vary greatly from client to client and could include:

* Online Traffic & SEO
* Social Media & Blogging
* Affiliate (Joint Venture) Marketing
* Article Marketing
* Advertising
* Publicity & PR
* Speaking (Live or virtual)

**Relationship Systems**

How does the business build relationships with people once they have joined the list?

* Sending out a regular Ezine or newsletter
  + Map out ezine template & sending process
  + Setup broadcast calendar (commit!)
* Autoresponders / Upsell
  + Setup automated marketing sequences for those who join the list huge gap here for many biz owners, lots of opportunity when done right.
* Social Media / Blogging
* Build social media plan for consistency

**Sales Systems**

Where the prospect becomes a client

* How do people become clients?
* Online via sales pages
* Live in-person conversations (sales calls)
* MUST have a strategic process in place here
* Follow-up Process
  + How to follow-up with interested parties (automate as much as possible) another area that is a big gap for many, lots of opp if you do this right

**Delivery Systems**

How are products and/or services delivered?

* Welcome Process
  + Once you make a sale, what happens then? (automate – immediate access)
* Tangible products i.e.: books, multimedia kits
  + Automated fulfillment (print & ship) – Vervante.com
* Membership Programs
  + Member area technology – WishList Member
* Coaching Programs
  + Various elements, depending on structure
* 1-1 Services
* Engagement process, how to get started?

**Scheduling Systems**

Keeping track of what is happening and when (big leak for many!)

* Booking Appointments (Automate)
  + Timetrade.com connected to your Google or Outlook calendar
* Promotional calendar
  + What are you launching/promoting & when? Plan the year in advance
* Publishing calendar – For ezines, solo mailings, etc
  + How often do you mail the list
* Central Events calendar
  + Classes, trainings, travel, etc Centralize your calendars in CD or Google Calendars

**Communication Systems**

How do people communicate within and outside the company?

* Email
  + Public email addresses vs. private, who answers what
* Phone
  + Get a toll-free number as your public ph#
* Instant Message
  + Recommend not using unless necessary – distracting!
* Social Media
  + Check blog comments, direct messages, etc

**Customer Service**

Taking care of questions before / after the sale

* Where do CS requests go? (email addy or online system i.e.: Zendesk)
* How quickly to respond to requests – set a standard (24 hr minimum is ideal)
* Template for replies (greeting, upsell, email sig)
* Create list of canned responses for common questions Client Intake & Planning