Section 7.3: Affiliates

Affiliates Overview

Person 2: "Why are affiliates so powerful?"
Person 1: "Well, for one thing, they're extremely scalable. Instead of having to get a new client every single time, you can land one strategic partnership and they can bring you hundreds or even thousands of clients. And affiliates can bring you clients for decades to come."

Person 2: "Wow, that sounds amazing. How can affiliates bring me more clients?"
Person 1: "Basically, every new affiliate you land is an asset to your business. And if you nurture your relationships with them correctly, they can promote your business for years and years to come. It's kind of like building a stable base of followers. It's the same way people build a personal brand. You grow this big brand with followers that gets bigger and bigger and more stable over time."

Person 2: "I see. That does sound like a stable way of growing a business. Are there any other benefits to using affiliates?"
Person 1: "Yes, you also have 100% control over your margins. With advertising, you're competing against everyone else who's trying to get your audience's attention. But with affiliates, you can control your margins and profitability is guaranteed if they promote your business."
Person 1: "It's a more cost-effective way of growing your business and to get some momentum out the gate, especially when you're first trying to get past that 50k a month mark."

Person 2: "So what's the difference between warm traffic and cold traffic?"
Person 1: Warm traffic means people are more likely to buy from someone they already know or trust, rather than a complete stranger which is cold traffic. When you see an ad from someone you don't know on Facebook, you need to be in the right mindset to consider it."
Person 1: "If you have a headstart and already have a relationship with someone, it's a lot easier to get them to promote your product. When someone they trust recommends something, it's more likely they'll check it out. Also, affiliates have a self-serving bias and will promote your product because they want to make more money for themselves."

Person 2: "But, how do you get them to promote your product if they don't believe in your vision or mission?"
Person 1: "You need to get them sold on your vision and mission, and make sure they feel comfortable promoting it. If they believe in what you're doing and trust you, it's easier to get them on board. Incentives are also aligned, as they'll make more money if they promote your product."

Person 2: "That makes sense. So, how powerful are affiliates for scaling a business?"
Person 1: "Affiliates are incredibly powerful for scaling a business. They're repeatable and scalable. If you can get one affiliate to promote your product, you can get five, and then ten, and so on. Many big online events you see are primarily promoted by affiliates, as they have huge audiences. You can even build multi-million dollar companies off of primarily affiliates."

Person 2: Can you give me an example or proof of the power of affiliates?

Person 1: Let's say we make $500,000 from this launch to our email list. If we run that same promotion six months later to the same email list, it'll do around similar numbers, that's a proven statistic.
Person 1: We've seen it time and time again in all sorts of businesses. We can promote the same thing to the same audience two separate times and have similar numbers. Only a small percentage of the market is ready to buy at any given time, so promoting it later will still have a similar effect.
Person 1: Most people get an affiliate to promote once and then move on to the next affiliate. But a good affiliate can promote for years and years to come.

Person 2: Where can I find an affiliate?
Person 1: The great thing is, anyone with a list or an audience of our potential customers is a potential affiliate. We don't have to look for affiliates; we look for strategic partnerships in our industry or market of people who already have that following.
Person 1: And even if they've never promoted anything before, they're still a potential affiliate. We just need to walk them through a sales process to close them.

Person 2: What kind of effort is needed to use affiliates?
Person 1: We need to build out a little bit of stuff on the front end, such as tracking and making sure we're able to attribute leads to each affiliate and pay them out. But the effort is worth it, and it's not nearly as much effort as almost any other strategy out there.

How to win with affiliates

Person 2: "What's the affiliate equation?"
Person 1: "Well, it's basically a system for treating affiliates like a machine so that you can win at a high level with them. Most people don't treat it like a system, they just reach out to a few people and promote their stuff, but if you take affiliates seriously and treat it like a professional, you can get really good results."

Person 2: "Okay, I'm interested. What are the variables of the affiliate equation?"
Person 1: "The affiliate equation is made up of three variables. The first one is the number of affiliates you have. The more affiliates you have, the more traffic you can push. The second variable is the size of the average affiliate, which is determined by the size of their audience across all the platforms they have. The third variable is the frequency in which they promote you, how often they are promoting you"

Person 2: "So the more affiliates I have, the bigger their audience, and the more often they promote me, the more traffic I can get?"
Person 1: "Exactly. And if you focus on each of these variables, you can optimize them to get really good results. For example, if you talk to 20 potential affiliates a day, you'll end up with more affiliates who can promote you more often, and if you focus on getting affiliates with bigger audiences, you'll have a much larger audience to promote to."

Person 2: "What percentage affiliate commission should I be willing to give them?"
Person 1: "It depends on how high converting the offer is and what the price point is. If it's a really high converting offer, and we offer a really high commission, then affiliates will be enticed to promote it, especially if it's a high ticket item."

Person 2: "So, if we offer them more than anyone else, then they'll promote us?"
Person 1: "Yes, that's right. Affiliates are like ads in the sense that the person willing to pay them the most wins. So, if we have the most enticing offer, we'll get more affiliates to promote what we're selling."

Person 2: "What about the size of the affiliates?"
Person 1: "It's only marginally harder to land big affiliates than small ones. And one big affiliate can be worth a hundred small affiliates. So, rather than getting five small affiliates a day, we can get one big fish a day, and it's worth much more."

Person 2: "What about the frequency of promotion?"
Person 1: "The goal is to get affiliates to promote regularly so we can build a stable base of recurring traffic. Once we make the first sale, which is getting them to promote the first time, the second sale we have to make is getting them to promote on an ongoing basis."
Person 1: You can also consider adding your free lead magnet as a free bonus to someone else's products, it'll generate traffic very quickly

Person 2: That's impressive. So what should I do after understanding the affiliate equation?
Person 1: First, we need to choose your affiliate program type and commission structure. There are a couple of ways we can do this, and the commission structure is really important.
Person 1: The better the offer, the easier it is to get people to say yes. So, the second thing we'll do is build your affiliate assets like the funnel, commission tracking, and email swipe files.
Person 1: And then we'll start recruiting affiliates. We'll pursue this super aggressively and try to land as many affiliates as possible. Approaching affiliates with pure raw aggression is key. If you put in the volume, you'll see massive results.
Person 1: Don't not spend too much time thinking through the affiliate program. Make quick decisions, get it live, and figure out the rest as we go.

Choosing your campaign type & commission structure

Person 2: What are affiliate programs campaign types and commission structure?
Person 1: There are two types of affiliate programs: front-end and back-end programs. In front-end programs, affiliates promote a front-end funnel that sells something for a lower price, typically up to $1,997, and they receive a percentage of the sale. On the other hand, in a back-end program, affiliates promote a free lead magnet funnel, where people opt-in for a free training or e-book. Affiliates get paid a percentage of your high ticket sales or retainer.

Person 2: I see. Which kind of affiliate program campaign type is better?
Person 1: It depends on whether you have a proven converting front-end offer that you can add affiliate tracking to. If you don't have that, you should do the back-end program.

Person 2: Okay, got it. And what about commission structure?
Person 1: We use a first-tier and a second-tier commission structure to align incentives with affiliates. The first tier incentivizes affiliates to promote right after they make a sale, and the better the offer, the more they'll promote.
Person 1:The second tier incentivizes affiliates to recruit other affiliates and receive a commission from their sales, and it also increases conversions. The better the first tier is, the more people are gonna tell their friends about it. And that gives you more second tier, it's like a flywheel."

Person 2: "Okay, got it. What's the recommended structure for commissions for a front end affiliate program?"
Person 1: "If you're doing a front end affiliate program, you should give away 90% commission first tier and 10% commission second tier. And don't worry, you're not giving up all your profit. You're breaking even to get leads for free. You get to keep 100% of the margin on your backend."

Person 2: "That's great. So what about the recommended structure for commissions for a backend affiliate program?"

Person 1: "For the backend affiliate program, my recommended commission structure is anywhere between 10 to 50% commission on the first tier. The lower the percentage, the harder it is to get affiliates. But the higher the percentage goes up, the more enticing that offer is to an affiliate and the more likely they are to push."

Person 2: "I see. So, how do I decide on the commission percentage?"
Person 1: "It's up to you, really. You should pick a number that you're comfortable with and be decisive. Maybe start higher and bring it down later. But the more it feels like they're winning, the easier it is to get affiliates."

Building a funnel from scratch: Overview

Person 2: How do I build a funnel and increase my sales?
Person 1: "All right, the best way to increase your sales is building your funnel from scratch. This is for if you're either at a place where your ads aren't working at all, or you're not running ads, you need to build an opt-in page to drive traffic.

Person 2: What if my ads are already working?
Person 1: If your ads are already working and you're crushing it, you scale them like crazy and you've solved all the constraints in your business. Or you have a team member who you put on this task and just trying to get lead costs down, you're gonna launch more funnels to try to optimize your lead costs down.

Person 2: "Got it. So what's the process that you use to build this funnel?"
Person 1: "Well, we start with a macro higher level picture. We look at the overall funnel structure and how we're going to go about it. Then we get more tactical about what's the process of coming up with that like a headline, what's the best lead magnet on the front end, etc.."

Person 2: "Okay, so what's the structure of the funnel?"
Person 1: "It's super simple. We use an Optum page that collects name, email, and phone numbers, it's mandatory to have phone numbers. It then drives to a tight form where we can see the lead quality and then it goes to a thank you page or a sales page/sales video where we sell something else to recruit some front end ad spend. It's literally three steps, maybe more if you have a sales page and some upsells, but that's totally optional."

Person 2: "I see. So what's the purpose of the funnel?"
Person 1: "The only purpose is to get phone numbers. We're just trying to get people to opt into something. And it doesn't matter if it's paid traffic or you're doing organic traffic. You're generating content and you're driving to your free thing. Super simple opt-in page is all you need."

Person 2: "I understand. What about selling on the thank you page?"
Person 1: "Recouping ads spent makes sense, right? If I'm spending money on ads, then I can make some of it back before I even have my sales team call them. If you do do that, you want to make sure there's congruency. The offer needs to correlate exactly to what they just opted in for.

Person 2: What can I sell on the thank you page?
Person 1: The thank you page could be a webinar where you sell something for a thousand all the way up to $3,000 to recruit some of the ad spend. Or you could do a low ticket offer and have some upsell. But this is just not a priority. If you need this to make your funnel profitable, there are much bigger problems."

Person 2: So what is the priority if it’s not selling on the thank you page?

Person 1: Well, we've found that all that really matters is the creative and the headline. If you have an opt-in page with a converting headline, any ad you write about will convert for the most part. The headline is crucial. It contributes to about 95% of success or failure.

Person 2: So, what's the first step to writing a headline?
Person 1: We're going to go over the principles of writing a good headline. Then we'll build the funnel around it, starting with an opt-in page with the headline we created.

Person 2: Sounds good. What kind of funnel should we use?
Person 1: It doesn't matter as long as we have the opt-in page with the headline. After that, we'll create an MVP fulfillment for the free lead magnet we promise in the headline. So we're going to create a five-minute training that's just okay and get it live to see if the opt-in rate is good.
Person 1: If the opt-in rate is good, we'll brainstorm and make the freebie really good. If not, we'll repeat the process until we cut the lead cost, and testing is key. The more we test, the cheaper the cost will be.

Person 2: How much of a difference can testing make?
Person 1: Testing makes a massive difference. We can cut lead costs by 50% or even 100% if we keep testing. It's the most cliché marketing thing, but it's true.

Person 1: This is going to be a problem. So what do we do? We focused on just that one constraint. Didn't worry about the sales team, didn't worry about the set script, didn't worry about the pre-call video, didn't worry about anything. All we worried about was getting opt-in rehired. So what did we do?

Person 2: What did you do then?

Person 1: We launched eight new funnels the very next day. Building the funnels is not that complex, so we did it ourselves. We wrote eight different headlines that were completely different from what we were offering, and then we tested with a thousand dollars a day on each of them.

Person 2: That sounds like a lot of money. Do you have to spend that much when you're testing a campaign?
Person 1: No, you don't have to. We value speed more than anything else, and we know that one of them is going to work. So just because we've done it over and over again, we test with 8K a day. Guess what happened? Two out of the eight funnels completely failed. The cost was super expensive, just like the first campaign.

Person 2: What happened with the other six funnels?
Person 1: Another two out of the eight worked kind of okay, they were decent. Three out of the eight crushed, and then there was one that, in particular, was crushing really, really well. It was like the right messaging that we wanted to get the right leads. So we scaled that one, the one with the best lead quality.

Person 2: So you didn't get it to work on the first try?
Person 1: No, we didn't. But a lot of times what happens is you get something to work okay, and you just keep going with that. That's okay if you get something working okay and it's profitable, then maybe it's not the constraint for a while, and you should just keep running it up until later.

Person 2: That makes sense. But how do you get the lead costs down?
Person 1: You can get lead costs down just by changing the angle, by changing the messaging. People all the time feel like, oh, if I change the messaging, it's not going to affect cost that much. But two different messages, two different headline angles of what the thing is, will dramatically affect the market differently.

Person 2: How do you test funnels quickly?
Person 1: When you're just trying to get opt-ins, it's really easy to test funnels because you can write a headline, create an MVP fulfillment for the headline, and it's more about the curiosity of the angle and what it is that you're promising than it is about the deliverable. You can test really, really quickly, like testing eight funnels in a day.

Person 2: What are some tricks and tips for writing headlines and testing funnels?
Person 1: There’s an old copywriting trick used by old school direct response copywriters. Instead of finding a product and writing a sales letter for it, they would pick a market and write a sales letter to that market, selling what they think they'd be most likely to buy. They would pitch it in a way that would be most likely to persuade them to buy from them. Then, once they wrote the sales letter, they would think about how to fulfill it and partner with someone who could do the fulfillment.

Person 2: That sounds like a backward approach. How is it better at converting?
Person 1: When you're picking something to sell, you're not picking it because you want to sell it, but because the market wants it. You're creating something custom for them that you know they would buy, and then you're figuring out how to create it. After you have created the ideal headline, you can find some way to fulfill it. It's a counterintuitive process, but if you do it and test it, you're eventually going to be right.

Person 2: I see. Could you recap all this for me?
Person 1: The headline is the most important part of the process. Building a funnel is easy, but the headline is what gets people to click on the ad and opt-in for the lead magnet. We'll be spending most of our time on the headline.
Person 1: After creating the headline, we're going to build the funnel around it. You copy the headline into the funnel and paste it into the funnel template, maybe tweak a couple of things. After that, we're going to build an MVP fulfillment for our lead magnet, which we'll talk about how to do.
Person 1: After they opt-in, there's a qualification page and then a thank you page. If you already have something to sell, you can sell it on the thank you page. All that matters is that you have an opt-in page that gets opt-ins that people click on.

Building your affiliate funnel

Person 2: How do I build an affiliate funnel?
Person 1: Well, you're one of two types of people: you're either doing a front end program or you're doing a back end program.

Person 2: What's the difference between the two types of program?
Person 1: If you're doing a front end program, you're giving away a really large percentage of whatever your front end offer is. You already have a webinar that works, and you're ready to go. You just need to add affiliate tracking onto it and start signing up affiliates.
Person 1: If you have a back end program, you're just selling your high ticket offer. You create a simple opt-in page to a free lead magnet that they're gonna be promoting. So when an affiliate's like, "Hey, what am I promoting?" All they're promoting is a free lead magnet to their audience. You'll explain to the affiliate how the process works, and they'll get a percentage on all those sales.

Person 2: How do I sign up affiliates?
Person 1: You just add a mandatory phone number to the opt-in page of your funnel, so they can't skip the phone number. You collect those phone numbers so you can start calling them.

Person 2: So what's the goal?
Person 1: The goal is to get as many opt-ins as possible. As long as we're being efficient with that lead flow, we can make as much money as possible from each individual lead. And if affiliates promote us and we're getting opt-ins, we'll be making money, guaranteed. The most important part is the messaging, not how fancy the funnel is.

Setting up affiliate tracking

Person 2: How do I set up affiliate tracking?
Person 1: Have you ever used Red track.io for affiliate tracking? They help you set up the tracking in a really hands-on way. They charge $295 a month, but if you choose the team plan for $249 a month, they will literally help you set up everything from the back end of your funnel to tracking opt-ins or book sales and even phone calls on your CRM.

Person 2: That sounds pretty useful. But what if I don't have someone technical on my team who knows how to set up these platforms?
Person 1: That's the great thing about Red Track. They offer a white-glove setup, which means they'll take care of everything for you. Plus, they have a 14-day free trial, so you can try it out before committing.

Person 2: Can I manage my affiliates on this platform too?
Person 1: Yes, you can. Red Track is a great place to manage your affiliates and get everything set up and well-rounded for yourself.

Person 2: And can I track people from an opt-in all the way to a sale on my CRM?
Person 1: Exactly! You can track everything from an opt-in to a book sale, course upsell, or any other upsells. And if that opt-in goes to your sales team and closes in your CRM, you can track all of that too, as long as your CRM has an open API like Go High level.

Person 2: That's really cool. So what's the price again?

Person 1: It's $249 a month for the team plan, and that should be all you need. And if for any reason it doesn't work or doesn't track, they'll refund you the full amount anyways and give it back to you.

Person 2: That's a pretty good deal. I'll definitely check it out. Thanks for the recommendation!
Person 1: No problem! Look forward to having you guys utilize this platform and the rest of the course to get some affiliates going and get some of that free traffic running.

Setting Up Affiliate Tracking With GHL

Person 2: How do i set up affiliate tracking with GHL?

Person 1: So the Go High Level affiliate platform works really well if you're not only selling a product through GoHighLevel on their funnels but just have landing pages and websites in general on the funnels here and are using them

Person 2: Sounds interesting. Can you explain more about the affiliate platform and how it works?

Person 1: Sure. So if you're using GoHighLevel for a lot of your business needs, like we do, it's a well-rounded platform that includes a lot of features, including a simple affiliate program that we've made some personal modifications to work for two different types of tracking, whether that's just lead tracking for any Optin form or actually, you know, sending somebody to the website, capturing that lead, and then also purchasing as well.

Person 2: That sounds pretty useful. So how do we get started with setting up the affiliate platform?

Person 1: The first thing we'll need is when you go to marketing and you go to the affiliate manager it's gonna have three step prompts here. It's gonna ask you to connect your Stripe account, add affiliates, and then set up your first campaign.

Person 1: You can skip all that of course, but you will not be able to have a campaign go live unless you have a Stripe account connected, a funnel connected with a live domain and added an affiliate and added a product to that funnel as well, or just in general.

Person 2: Alright, so how do we add a product to the funnel?

Person 1: It's really easy. If you're familiar with Go Level, you already know how to do this. For example, even if you're just tracking like literally opt-ins, you're not even selling a product, you still need to add a product to the page and attach it. And again that's just so we can generate an affiliate link, track those leads properly and go from there.

Person 2: Okay, got it. So what's next?

Person 1: With that being the case here, we have this affiliate example product that's $9,800. It's all just setting up there. Again, quick little product, and then if we go to marketing, we go to affiliate manager. I already added myself as an affiliate. All you have to do is click the add button, new affiliate name, you know, name, phone number, email all that good stuff. You don't have to add any of these.

Person 2: That's pretty straightforward. So how do we create a campaign?
Person 1: When it comes to creating a campaign, we're just gonna go here real quick and create this campaign. And then for sites as well, just so you guys are aware, we did this affiliate example opt, and it's just a quick little opt-in page. We'll see this page as I generate my affiliate link and send it to myself.

Person 2: Okay, got it. Can you walk me through how to generate the affiliate link?
Person 1: Sure. Go to campaigns. I'm gonna click add, and it's gonna do, you know, testing campaign. Okay? And then, sorry, actually this is a really important factor too, is add these dashes in there and I'm gonna show you why that's super important here going forward. They're just gonna use that one. As you can see, there is the link. It's gonna throw the affiliate ID right

Person 1: "So we pay him every 60 days. 30 is the average. And we can do a flat commission based on this or a percentage, like 10%. What do you think?"

Person 2: "I prefer the percentage. And what's the template we are going to use?"

Person 1: "I believe it's this one. Let me just double-check that here. Alright, so coming back to this, it was the correct template there. I just renamed it the affiliate welcome email here cuz that has certain parameters in it that I'm gonna show you here as well."

Person 2: "And how long does it take for me to receive the affiliate track link?"
Person 1: "As we create that campaign, I'm going to actually receive an email with that affiliate track link.

Person 2: "Alright. And why did you put those dashes in there for the campaign?"
Person 1: "For tracking purposes, that has to be dashed like that, otherwise you get an email that looks like this, okay? And now you have testing contact filtering, right?"

Person 2: "I see. And what about the tracking of the affiliates?"
Person 1: "When it comes to campaigns, you'll see customers, leads, churn, and then revenue generated. As you go to this, let's just go to affiliates here and go here. You'll see customers cancel customers, leads, owed, paid. This is kind of like what you owe and you know, are to pay. And then this is the revenue they generated."

Person 1: "We're just gonna market as, yes. We do that for future filtering here. When we actually win an opportunity, we send a web hook to a tracking Google sheet, which I will also show you how to set up. So that way you're not trying to just filter out contacts in your smart list here of all these different things, right? So again, just trying to build a seamless process for you guys. So let's go here and do this really quick."

Person 2: "Okay, I'm following you. What's next?"

Person 1: "I think it's seeing and entering my name. And then we're just gonna do this really quick, just like that. And then, okay, and just hit submit. Okay? Now it's gonna bring us to this two-step order form. So let's go here and we're just gonna refresh this quick, okay?"

Person 2: "Okay, I see. What's the purpose of this form?"

Person 1: "This form will help us track our customers and their activity on our website. If they complete this form, it will register as a lead and we can track their activity from there. Now you'll see we have one lead, okay? Affiliates one, one lead. Okay? And then again, if you go to affiliates here, you'll see that we have generated one lead, okay?"

Person 2: "Got it. So how do we pay out our affiliates?"

Person 1: "We can track our affiliates and pay them out using this Google sheet script that I have set up. It's super simple and easy. The first thing we're gonna do is go to settings and I'll show you why. So when you're in this sheet number one, you're gonna get a link to this, just come up here, go file, make a copy, okay? It's app scripts file functionality also, okay, you want all of that, right? So make a copy. Then you just come in here and you have to give it about, you know, 30 seconds and the GoHighLevel will pop up right there. So just give it a second here and allow that to..."

Person 1: I decided to add that in addition for you guys there. So refresh that quick.

Person 2: Yeah, we can just go back here. Okay, Just a copy of that. Paste that there. Click save. Beautiful.

Person 1: Okay, so now what we need to do is we actually need to publish this. So we're just gonna go to extensions here.

Person 2: Okay.

Person 1: We're gonna go to app scripts. Again, you literally don't have to touch a thing in here. It's all good to go. Ready to rock and roll, just have to hit deploy new deployment.

Person 2: Got it.

Person 1: And then it's gonna be to anyone. I always recommend adding a description here. You know, just first, first deployment, you know, again, just whatever version it is, variation, whatever that may be, just click deploy here.

Person 2: Okay.

Person 1: And then what that's gonna do is that's going to give you a link, right? You're gonna copy that and you're gonna throw that right here, okay?

Person 2: Got it.

Person 1: Hit save, save. And then what we can do, and so again, this is based on an opportunity one, right? So make sure it's on multiple, then we're gonna go back to this contact and we're just gonna add a quick opportunity here.

Person 2: Alright.

Person 1: I'm gonna close the calls, we're gonna do new schedule, we're gonna do one, and then we're gonna do it for 9,800. Okay? And then you can click add. And so what that's gonna do is that's good, then you're gonna kick the data to our spreadsheet right here.

Person 2: Okay.

Person 1: So that is, now again, we're gonna go ahead and troubleshoot this because it didn't pull through the source. Obviously that is the main factor here.

Person 2: Alright.

Person 1: So we're gonna go ahead and figure out why that was not pulled through on this. But again, I think you guys start to understand exactly the full reason of why this works and how you can track this all the way through and through just to make sure that the actual reason or the actual tracking is properly done.

Person 2: Okay.

Person 1: So, and then again, you can add the campaign name and we'll add, so we'll just add another custom field in here really quick. That'll actually help us with the tracking.

Person 2: Alright.

Person 1: And just be indefinite right there. So then we're gonna go to custom fields here again. So I'll just walk you guys through this here and just my thought process. And we're just gonna do affiliate, We'll just do, we're gonna just do affiliate bird name, something like that, right?

Person 2: Okay.

Person 1: Nothing crazy. And again, you guys can change this to whatever you want, doesn't matter to me. It's just so we can pull the data through accurately and then we're just gonna go here and then we're gonna go there again.

Person 2: Got it.

Person 1: Let's see here. Where's the contact source? My guess is that when I won the opportunity, it re-updated the contact source. So we'll just do, we'll do exactly what I did before. So, Because this is what it would be, it would be Dash, okay, just like that.

Write affiliate swipe emails

Person 2: "What are email swipes?"
Person 1: "They are pre-written emails for affiliates that they can use to promote our business. They just have to copy and paste the email, and that's it."

Person 2: "Oh, that sounds helpful. How do we create email swipes?"
Person 1: "It's actually quite easy. All we have to do is make a few email templates that the affiliates can customize and send out to their lists. The goal of these emails is to get people to opt in for our free lead magnet, that way, we can get their email address and build a relationship with them over time."

Person 2: "That makes sense. And what if affiliates feel like they're selling something to their list?"

Person 1: "We just have to tell them that these emails are all about delivering value. We're not asking them to sell anything. We're just giving their subscribers free value."

Person 2: "Okay, that sounds good. And how many email templates should we make?"
Person 1: "I think we should start with four, just to get some initial momentum with the affiliates. But we can always add more later on. The more options we give them, the more likely they are to keep promoting our business."

Person 2: "Great, that sounds like a plan. So what's the next step?"
Person 1: "The next step is to copy and paste these templates into a Google doc and customize them for our lead magnet/opt-in page. We should make sure to give our affiliates lots of subject line options too, so they can choose the one that works best for them."

Person 2: "Okay, got it. And how do we make these emails sound unique?"
Person 1: "We should try to make them our own. Don't just copy the templates word for word. The more unique they sound, the better. And remember, it's not that hard to sell a free thing. We just have to convince them to opt in for our lead magnet."

Create social media post templates

Person 2: How can I create social media post templates?
Person 1: Canva is a really easy drag-and-drop software for designing anything, and I'm going to show you how to use it to create your entire swipe file for all of your affiliates.

Person 2: Okay, that sounds great. Do I need to have any knowledge of Adobe Illustrator or Photoshop to use it?
Person 1: Not at all. Canva has all the features built in, and it's just basically click, drag, drop, type, whatever you want to do. If you don't have an account, I would urge you to get the paid version. It has some more features that are going to be beneficial to you, but if you don't want to pay for it, go ahead and get a free account.

Person 2: Alright, I'll get the paid version. So how do I use Canva?

Person 1: Once you're signed in, on the left-hand side, you're going to see templates. Go to templates, then we'll go to social media. All of these are pre-built templates to the dimensions and sizing that you're going to need for all of the mediums.

Person 2: Got it. Which one should I start with?
Person 1: Let's start with a Facebook post. Once you're in there, there are 165,000+ pre-built templates to start with, or you can completely start from scratch if you want to design it more in-depth to how you want it.

Person 2: Okay, that sounds good. What should I do next?
Person 1: Basically, if you just double-click in here, you can change this photo. You can move it around. If you want to get completely rid of it, go ahead and delete it.. You can size it to the size that you want, and then you can send it to the back. You can edit the lettering, my offer, promotion, join now, whatever it may be.

Person 2: I see. Can I add my logo in there as well?
Person 1: Yes, if you have your logo uploaded, you can go ahead and add it in. Inside of elements, they have different things like stickers. They have if you want an arrow to certain things, you can go to graphics, all sorts of different stuff that you're going to have in here which is why I said to you, get the pro version. You're going to have way more pieces you can actually use inside of here to spice up your actual swipe file.

Person 2: Okay, that makes sense. What do I do once I'm done designing it?
Person 1: Once you're done, you're going to click share and then you're going to go to the brand template. Once you're there, create a new folder for affiliates. Click add the new folder, and then click publish. Then, you're going to go back up and click share again. Click download, and then whatever file type you want you can have jpeg, pdf, svg, gif, whatever you want to use.
Person 1: Just keep repeating this process over and over until you have all of your entire swipe file built up. You can have it in one singular folder that you can share with all your affiliates, and everything that they're gonna need is there.

The affiliate flywheel

Person 2: How do we approach affiliates?
Person 1: The same way it's a higher conversion rate over the phone when we're selling a $10,000 offer. There's a higher conversion rate over the phone with affiliates when getting them to promote, than sending them an email and being like “Hey, so here's my promotion thing, you wanna promote it to your list”, you're gonna close way more affiliates on promoting over the phone.

Person 2: Okay, I see. And what do we do on these calls?
Person 1: On the call, we get a soft agreement on them promoting. Meaning they don't agree to a specific date, but you get them open to the idea of promoting. And on that same call, what you do is you get them to introduce you to more potential affiliates.

Person 2: How do I make affiliates introduce more potential affiliates?
Person 1: You tell them about the first tier and about your second tier program. And you say, "Hey, by the way, on top of that first tier program we also have a second tier program where anyone else who has an audience in this space, if they promote, what's gonna happen is we'll give you x percentage of any sales that they make to their audience." And you basically get them to make more intros and you're gonna get on those calls with those people and you're gonna get soft agreements from them and so on.

Person 2: " How do we get affiliates to promote us?"
Person 1: "Well, first we get them to agree to a soft promotion, and then we do all the groundwork. Once we have everything set up, we send it to them and then get on a call with them."

Person 2: "Okay, and what happens on that first call?"
Person 1: "We get them to agree to a specific date for the promotion. Sometimes affiliates say they'll promote but never actually do it, so we have to push them across the finish line."

Person 2: "Makes sense. And what about after the promotion?"
Person 1: "After the promotion, we follow up with them to make sure they keep promoting. Then we get them to agree to the next promotion and keep repeating the process over and over again. This is how we increase the frequency of promotions."

Person 2: "And how do we get them to promote more frequently?"
Person 1: "We also get them to introduce us to more affiliates, and then we repeat the same process with them. We call this a flywheel. By doing this, we're not only getting them to promote more frequently, but we're also getting them to refer more people to us."

Person 2: "That sounds great. But how do we recruit so many affiliates like the companies that have built nine-figure companies off of affiliates?"
Person 1: "With a really good second-tier affiliate program, everyone becomes incentivized to tell everyone they know. The better these incentives are, the easier it is to push people through this flywheel.

Finding potential affiliates overview

Person 2: How do I find potential affiliates?
Person 1: All right, let's talk about finding potential affiliates. We need to figure out who they are, where they are, and how we can actually get a hold of them.

Person 2: That makes sense. So, who are we looking for?
Person 1: You wanna find people who already have the audience you want to get in front of, whether it's on an email list or social media or wherever, they are a perfect potential affiliate.

Person 2: Okay, got it. What are some potential affiliates we should be looking for?
Person 1: Business owners who've built their list/customer base in the same space as you, competitors, people who serve a similar market, influencers, community owners, and websites that get tons of traffic.

Setting up your affiliate CRM

Person 2: How do I set up my affiliate CRM?
Person 1: I'm gonna walk you through how to set up your own affiliate CRM tracking system, reminders, things like that. Just how to utilize GoHighLevel to create a high-touch OneTouch system.. So just using a brand new sub-account, go to opportunities and create a new pipeline.

Person 2: Okay, sounds good. What should we name the pipeline?
Person 1: We're just gonna name the pipeline Affiliate Applicants and then we're gonna do new applicants. And then we'll do scheduled call. And then we can agreed to push. We can just do three stages right now. Literally just wicked simple and super easy here. So we're gonna click save there and then we can go back here and you'll see those show up right there.

Person 2: Alright, what's next?

Person 1: The second thing we're gonna go ahead and do is we're gonna go down to settings and we're gonna go to custom fields and we're gonna add a couple things. So there are these folders here, and we're gonna go to contact we're gonna add at least two fields here, okay? The first one being the affiliate link, and then we're gonna add another field that's gonna be a dropdown, and this one is gonna be the affiliate status.

Person 2: What should we name the dropdown options?

Person 1: We'll do a new applicant, scheduled call, agreed to push curve, we'll do like currently pushing. Okay?

Person 2: Got it. What's next?

Person 1: The secondary thing we're gonna go ahead and do is we're going to create a form for the applicants to fill out, right? So if you go to sites, and then you get a form builder, we're just gonna create a new form.

Person 2: What questions should we include in the form?

Person 1: You can just add full name, phone, email, maybe website if you'd like to see if they have a website. Sometimes you can add company. Make sure to make the necessary fields required and the others optional. If you wanna add any other questions, we'll just add a custom field. For example: how big is your email list? Okay? Once we have that, all we're gonna do is just click save.

Person 2: What's next?

Person 1: Oh, we're gonna add it to a group. We're just gonna add that to general info not a huge deal. And then we'll boom pop that one right there. And then allows them to, we can just do placeholder, like 10,000, right? And then you click save form and we're gonna, oh, we're gonna copy that link and I'm just gonna throw that right there for future use.

Person 2: Okay, what else do we need to do?

Person 1: "So the interval means they can book every 30 minutes, right? So they can book at 2:00 PM 2 33, 3 34, 4 30. You get the point, Okay?"

Person 2: "Yes, that's correct. What about the duration? Do you have any preferences?"

Person 1: "Well, I'm always a fan of making it to where they can't book at the end of the month, right? The whole purpose of affiliates is to get them pushing sooner than later. So I'll put the date range five days out. That way they have to book within those five days or they have to wait. And that way you're only getting serious applicants in the door."

Person 2: "That makes sense. What about the minimum duration?"

Person 1: "It depends. If you want somebody to book same day, you could do like two hours, one hour, whatever. If you don't want them to book same day and do next day I always recommend 12 hours. If you do one day, it will block off that whole next day for you. So like Wednesday, if we did one day today, all next day of a Thursday, and potentially even Friday will be completely blocked off."

Person 1: "Let's just select your office hours, 8:00 AM to 5:00 PM, set that up and go from there. We'll save and continue.

Person 2: What about the custom form?

Person 1: "We'll receive the regular form there, no big deal. It'll do data matchup based on email, phone number. We'll allow Google to send that. And then we'll sign contact, so respective team members when an appointment is booked."

Person 2: "Okay, and then we can just leave that there too. So, what's next?"

Person 1: "We're gonna go ahead and copy the permanent link and then we're gonna go back to automations here and we're gonna add that to this text message. And we'll just do 'book here,' add that link. Save. Good to go. Awesome."

Person 2: "Okay, I see. And what's that number you're putting in there?"

Person 1: "Oh, that's just a random phone number. It doesn't really matter for this purpose. I'm just showing you guys an example. Again, it doesn't need to be anything complex. Just simplify it to where you can keep track of people, send them reminders, which we'll build here in a second. And also get people to move through that process to become an affiliate sooner rather than later. That way they can get to pushing your stuff."

Person 2: "Great, so what's the next step?"

Person 1: "We can come in here, you can book a call. In addition to that, real quick, before that, we can come in here and just create a new workflow too. And also, sorry, we'll do recipe appointment confirmation plus reminder and then hit create new workflow. And so this is just gonna be triggered by that appointment in calendar."

Person 1: So again, just a nice well-rounded set up for you to have a high touch system but automated with OneTouch for you.

Person 2: What do you mean by a high touch system?

Person 1: I mean a system where we can keep in touch with the clients and affiliates regularly, without requiring too much effort on our part. And with OneTouch, the process can be automated, so we don't have to do much.

Person 2: That sounds good. Can you explain how it works?

Person 1: Sure. Realistically, you didn't do anything. All you did was send them the form link, they filled out the form, we added the opportunity, put them in the correct stage, we updated their affiliate status, then we sent them a text, saying, Hey, please book your scheduled call.

Person 2: And after they scheduled a call, what happened?

Person 1: We automatically updated their opportunity and affiliate status, got them on the counter, put them in report and reminders again, all automatically just by sending them that form and going that route.

Person 2: I see. What else can we do with this system?

Person 1: If you want to manually add a contact, you can hit 'add contact,' and go through Adam, no issue there. The last thing I want to show you here really quick, just to keep this simple, is workflows. We can create a workflow, and if the contact changed and the affiliate status has changed to 'agreed to push,' we can set up a wait for two days and then send a text to check in and see if they had an opportunity to push their affiliate link to their audience.

Person 2: That's a good way to remind them to push our product. What about the affiliate link?

Person 1: We can send their affiliate link in the text using a custom field in the contact section. So when they become an affiliate and they're signed up, we can put this link in their profile in Go High Level. That way, when we send out these reminders or emails, we can give them their affiliate link to them and say, "Hey, if you somehow lost it, forgot it, don't have it, need it on the fly. Here it is."

Person 2: That's convenient. And what if we want to give them incentives?

Person 1: We can remind them of the incentives in the text or email, and keep following up with them to push our product. That's the whole goal of bringing on affiliates.

Person 2: I see. This is a simple and easy process for a high-touch system. Thanks for showing me this.

Person 1: You're welcome. It's totally worth it just to kind of follow along in this video and see how you can really just set yourself up with a simple system. You don't have to follow this exact system, but this should show you how easy it is to set yourself up with a system that's gonna work for you, not against you.

How to get them on the phone

Person 2: "How do I get potential affiliates on the phone?"
Person 1: "First, we find a potential affiliate and message them on social media using a cold message template. We then scrape their contact info using Apollo.io to get their phone number."

Person 2: "What's a cold message template?"
Person 1: "It's a message that includes specific context about them and talks about a new project we're working on. We mention big names we're bringing on as affiliates and how they could be involved."

Person 2: "What do I do after sending the cold message template?"
Person 1: "Yes, we call them and try to have a conversation. If they don't pick up, we text them and send an email with a similar message. The goal is to get them on the phone."

Person 2: "Got it. This sounds like a lot of work. How can I make it easier?"
Person 1: "Eventually, you can build a team to do this for you, but for now, you have to do it yourself to master the process and prove that it works."

Person 1: "Have you heard of Apollo? It's a great tool we've been using to get in touch with important people. Let me walk you through how to use it. So first, you go ahead and download Apollo from apollo.io and sign up for free. You'll get some free credits that you can use. Then, I recommend getting a lower level pay plan so that you can get the personal cell phone numbers of the people you want to get in contact with. That's really the bread and butter of the strategy."

Person 2: "Okay, got it. So, how do you use Apollo exactly?"
Person 1: "Well, once you have Apollo, you can install the Chrome extension. Just search for 'Apollo Chrome extension' and install it. Then, when you go on LinkedIn, it should pop up in the sidebar. You can enable it so that it shows up everywhere."
Person 1: "Then, you basically find the person you want to get in touch with on LinkedIn. Let's say, for example, the CEO of Verizon. You pop their profile link into the Apollo extension and press 'save contact' and then 'request a mobile number'. About 60-70% of the time, you'll get a personal cell phone number, but sometimes it may not pull up. If that's the case, you can still email them using Apollo."

Person 2: "Wow, that's really cool. Does it work for anyone on LinkedIn?"
Person 1: "Yeah, even if they're a small presence on LinkedIn, Apollo can find most people's phone numbers. And a lot of times, they'll also pull their personal email, which is great to hit them in because they check it more often than their business email."

Using Linkedin to find affiliates & message affiliates

Person 2: "Can I use LinkedIn to find potential affiliates?
Person 1: "Well, first off, LinkedIn is a great platform for finding potential affiliates because the net you can cast is much broader. So, I urge you to start with LinkedIn as your outbound strategy to find potential affiliates."

Person 2: "Okay, that sounds good. But what if I can't find the audience I'm looking for?"
Person 1: "If you can't seem to get a hang of it, you can try using Facebook groups and other strategies we've talked about to find your affiliate pathway. But I strongly suggest using LinkedIn to be your first point when searching for potential affiliates."

Person 2: "Alright, got it. So, how do I find my target audience on LinkedIn?"
Person 1: "Well, there are three questions you need to ask yourself. First, who is your target audience? Second, where are they receiving their content and who are they getting it from? And third, who has a list of potential clients that they are actively communicating with?"

Person 2: "Okay, but can you give me an example of how this works?"
Person 1: "Sure. Let's say you own a coaching consulting company called 'Scale Your Roofing Business with Landon.' Your target audience is roofing contractors. Now, you need to ask yourself, where are the roofing contractors spending their time, money, and energy outside of their work? In this case, the answer is roofing product suppliers. So, you can align yourself with these suppliers and potentially partner with them to have them pushing your product as well."

Person 2: "That makes sense. So, how do I find these suppliers on LinkedIn?"
Person 1: "Well, if you have Sales Navigator, you can search for 'Roofing Supply Company' and narrow down your search by job title and seniority level to find high-level executives who can make decisions on partnering with you. If you don't have Sales Navigator, you can still search for 'Roofing Supply Companies' in the search bar and look for second and third level connections."

Person 2: "Okay, got it. Thanks for explaining that to me."

Your First Call With Potential Affiliates

Person 2: "How do I conduct my first call with a potential affiliate?"
Person 1: "Firstly, we need to build rapport in the beginning by sharing why we serve the market we serve, what our mission is, and how we're trying to help people. This is really important to make it easier to close deals, rather than purely financially driven. Secondly, we tell them about the commission structure and get them to agree that they would be at least open to the idea of promoting us. Lastly, we get them to make intros for a second tier."

Person 2: "What's the script for the first call?"
Person 1: "The affiliate first call script goes something like this. Firstly, you give them a call and ask them about themselves for three to five minutes. Then, you tell them about your mission and why you believe it's important. You pour your heart out and explain what got you into it and why you believe helping them is such an impactful and important thing. Lastly, you tell them about our $10,000 offer to help women get x, y, z result and our $3,000 commission per sale. We're looking for more affiliate partners like you. Got it?"

Person 2: "Yes, got it. Thanks for sharing the script."

Person 1: "No problem. Remember, the first call is just a soft agreement, and we'll button it down and get them to agree to dates later on. This is the only purpose of this first call. If we accomplish all of these things, the call is a win and they become very valuable to our company."

2nd call with potential affiliates (locking in the promotion)

Person 2: "How do I conduct my second call with a potential affiliate?"
Person 1: These are the people who already made a soft agreement to promote, right? Now we need to get them to agree to specific dates.

Person 2: How do we get affiliates to agree to specific dates?
Person 1: We use the reciprocity and consistency bias to get them to agree to those specific dates. We already did all the hard work for them in setting up their account, and they'll feel a little guilty if they don't promote the free thing to their audience.

Person 2: That's a good point. But how do we get them to agree to a specific date?

Person 1: We need to make it less emotionally painful for them to agree to a hard date than to back out completely and make it look like they were lying. Once they agree to promote, we're going to follow up to make sure they can't back out.

Person 2: Got it. And what about getting them to refer more affiliates on the call?

Person 1: That's the second thing we're going to do. We're always recruiting new affiliates, so we want to encourage them to refer more affiliates on the call.

Person 2: Makes sense. Do you have a script or framework for these calls?

Person 1: Yes, we do. These calls are usually super casual, but we have a good framework you can follow to execute all of the psychology we talked about. We start by opening up with "Hey name, got some good news," and then walk them through everything we've done for them. We present it as the best news ever and get them excited about it before we ask them to commit to specific dates.

Person 2: I see. And once we make them a whole bunch of money, they'll be more likely to promote again, right?

Person 1: Exactly. That's why it's so important to follow up and make sure they can't back out once they agree to promote. Once they see the results and how much money they've made, they'll be more likely to promote again in the future.
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Follow up to get them to actually promote

Person 2: How do I follow up on affiliates to ensure they will follow through?
Person 1: Wow, you are in an excellent spot now. You've got affiliates who have agreed to promote you, and they even agreed to a specific date of when to promote, but just because someone agrees to promote doesn't mean they will. You have to be obsessed with following up to get affiliates to promote.

Person 2: How do we follow up without being too pushy?
Person 1: The best way to follow up is to set reminders in your CRM for each affiliate. Seven days out from the promotion, you reach out to them and confirm the date. If they don't respond, you follow up again and even give them a call.

Person 2: But won't contacting the affiliate multiple times be annoying?
Person 1: Actually, the most successful affiliate managers are the most annoying ones. They are obsessive with messages and always top of mind. And that's the biggest thing. People aren't thinking about you nearly as much as you think they are.

Person 2: So what's the follow-up process we should use?
Person 1: Set reminders in your CRM for each affiliate. Seven days out, reach out to them and confirm the date. If they don't respond, follow up again and even give them a call. 48 hours out, do a double check-in and make sure they have everything they need.

Person 2: And how often should we follow up with affiliates?
Person 1: You should be nurturing those relationships as much as possible. Just check in on them, have conversations with them, and build that relationship. They're like clients who can make you $50,000 a month if they're good affiliates, so it's worth it to invest in those relationships.

Post promotion

Person 2: I already had an affiliate push. What's the next step?
Person 1: Well, that's really good news because that means you've already done the hardest part.
Person 1: If you made money, then you're in a really good spot. Let’s talk about how to really keep that flywheel churning and going faster to where we're getting more affiliates promoting more often.
Person 1: Here's our post-promotion goal. So after somebody promotes, there are three ideal outcomes. Number one, you get them to become an evergreen affiliate. When I say evergreen affiliate, it means they

start consistently pushing you. The second biggest priority is to get them to promote again. The third is to get them to refer more affiliates.

Person 2: So what happens after the promotion?
Person 1: So, there are really two variances depending on what happens after the promotion. The first one, which is ideal, is you made them money as an affiliate, they promoted you, you made them money, and they're pumped about it, right?
Person 1: You're going to call them and get them excited about how much money you just made them. Talk about it, and make them feel good. After they're at the peak of their excitement, ask them when will be the next time they'd be open to promoting again in the future? That way we can schedule that for you.
Person 1: The second outcome is you don't make them money. So, we're gonna talk about how to nurture those relationships and really save those relationships to where that affiliate doesn't just drop off the face of the earth and become nobody to us.

Person 2: That makes sense. What's the plan in case we don’t make them money?
Person 1: Well, you need to follow up with them and nurture the relationship. See if there's anything you can do to help them be successful in promoting you. Find out if there are any issues that you can address.

Your Day-To-Dav

Person 2: How do I keep the cycle going on a day to day basis? What should I do?

Person 1: "If you're doing affiliates and this is your main source of traffic, we treat it as if we're professionals, and this is gonna be our day-to-day triage list, how we approach the day and really the overall philosophy we take when it comes to affiliates in the process that we've already talked about

Do you understand the affiliate flywheel? You understand the process of pushing people through and following up, getting them to promote."

Person 2: "Yeah, I remember that."

Person 1: "You understand the process of asking for second tier affiliate referrals to get more and more affiliates promoting. And the more we can get that flywheel churning, it's gonna pick up momentum. And once it picks up momentum, there's no slowing it down. And you're gonna be in a really, really good spot and your business is gonna be able to scale more than you ever thought possible. And that's before you even get paid ads to work, right?"

Person 2: "Yeah, I see your point."

Person 1: "Paid ads are how we get to that eight-figure mark really easily. But with affiliates, there's no reason you can't scale to multiple seven figures. Heck, you can even scale to eight figures with that as well.

So let's dive in with that. Set your daily triage list, right? Number one, top of the triage list.
The first thing you're gonna prioritize is moving existing affiliates along in your pipeline as much as possible.

Person 1: "So the follow-up process of following up with every single body, every single person, anyone who's already promoted, calling them, doing the post promotion process. Hopping on those second calls where we're getting them to commit to hard deadlines. Anyone who's already in your pipeline that you've already had conversations with, who's already agreed to promote, you just need to get them to keep promoting or to follow through on promoting, that is your number one triage. That is the first priority. You're gonna move all those people along as much as you can, the very first thing in the day."

Person 1: "And the reason why is because a bird in the hand is worth more than two in the bush, right? Someone who's already agreed is a much hotter lead than someone who's never heard of you before.

So our first priority is to move those deals along the furthest we possibly can. So when we've done everything we can to move all the people who've already agreed to promote, then we move on to getting new affiliates."

Person 1: "But first things first, we obsess on this process in doing it like a professional, right? We follow up as much as we can. We move them along in the pipeline as much as we can. We make sure we're doing everything in our power to get them to promote either the first time or for the 10th time. Doesn't matter which one. Our existing affiliates and people who agree to be affiliates are our number one priority. That's the asset that we currently have. We wanna nurture that asset and make sure that we're getting the most out of it we possibly can."

Person 2: "Got it, nurture the asset. What's next?"

Person 1: "So, I was talking to the marketing team today and they're looking for a couple of people to promote for them. They're not trying to build an army of affiliates."

Person 2: "And that's what we want. We need to have an army of affiliates."

Person 1: "Exactly! And in order to have an army, we have to reach out to a ton of affiliates before we even get someone on the phone."

Person 2: "I understand. So, how do we do that?"

Person 1: "We have to reach out to a bunch of affiliates and get someone on the phone, and get them to join the army. And then, we have to reach out to a bunch more affiliates and get one on the phone and get them to join the army."

Person 2: "Okay, so we have to keep reaching out to people until we get someone on the phone who's willing to join our army of affiliates."

Person 1: "Exactly! And if we keep doing this for a long enough period of time, we'll have a whole slew of troops who are out there promoting to their audiences. They'll be working for us, building their brands for us, and running ads for us."

Person 2: "Wow, that sounds amazing! So, how do we get started?"

Person 1: "We have to align incentives to where it's a win-win for both of us. You have to get a ton of people and talk to a ton of people before one agrees to push. And guess what? You have to get a ton of people to agree to promote before one actually does."

Person 2: "I see. So, we have to get better and better at this process over time."

Person 1: "Yes, exactly. And the more credibility we have and the more big affiliates we've had push, the easier it gets. But in the beginning, it's like pushing a car, getting that first affiliate. It's hard to get momentum. But once we get the second affiliate and the third, and those guys are promoting for us every single month, it gets easier and easier."

Person 2: "Got it. And how many affiliates do we need to have in order to succeed?"

Person 1: "If our goal is 20K a month, we need to aim for a hundred active affiliates. And if our goal is 200K a month, we need to aim for a thousand active affiliates."

Person 2: "That sounds like a lot of affiliates."

Person 1: "It is, but if we aim past the target, even if we fail, we end up so much further ahead of our original goal."

Automating & Scaling Affiliates

Person 2: Can I scale and automate affiliates? If yes, then how?

Person 1: At the beginning you shouldn't focus on automating and scaling. You should focus on getting the process to work, getting proof of concept. Once you have something that's repeatable, then we can scale it.

Person 1: Focus on mastering the process, getting it to work for your business, figuring out the best way to find those affiliates, get ahold of those affiliates, and to actually get them to follow up and to promote.

Person 1: But if it’s already working and you truly want to scale and automate, here’s how:

Person 1: First things first, you already know the affiliate equation, right? The number of affiliates you have, times the size of the average affiliates, times the frequency. The amount of times they push equals the total avail volume of traffic they push. The total amount of affiliate traffic you get. Increase those variables so that you get a higher output.

Person 2: So, what do we need to do to increase the variables?

Person 1: Number one, if we're reaching out to affiliates ourselves and we're getting them to promote ourselves, and we're doing all the follow up, all the management, all that sort of stuff, we can't scale it simply because, you know, there's only so many hours in the day.

Person 1: The first step to scaling it is really automating it.

Person 1: So first thing is someone's gotta do it. So we hire someone to replace ourselves in the process of finding and following up with affiliates. So exactly what we're doing on the day-to-day, you're gonna hire somebody who can do the exact same thing, and we pay them a percentage of the sales they generate.

Person 1: We do the exact same thing with affiliates and we give them a percentage of the deals that they actually close. This incentivizes them all to get more affiliates, to get bigger affiliates and to get them to promote over and over and over again.

Person 2: How do we duplicate ourselves in that role where it is getting affiliates, following up with affiliates?
Person 1: We take someone under our wing, we show 'em the process, we walk 'em through each step they have. You have them go through the same training that you went through and you show them exactly the messaging that's working

Section 7.4: Referrals

Referral scripts - for unclosed leads

Person 2: How do I write a referral script for unclosed leads?
Person 1: "So let’s talk about the referral script for Unclosed leads. These are the leads that you were not able to close. We use this referral script at the very end of a call that we cannot close. This is a last resort. We don't default to this. This is not a replacement for anything that you do. This is just like, Hey, before I hop off the call, rather than just doing small talk, I'm gonna do this little piece right here."

Person 2: "I see. So, how does the referral script for unclosed leads work?"
Person 1: "It's much shorter. You're gonna say this at the end of the call "Hey, by the way, we do have a referral program where we pay you $3,000 for anyone you refer. Is that something you'd be at least slightly interested in? I know X YZ wasn't a good fit today, but I thought I'd just bring that up” and you're gonna get them to agree to basically do a text intro.
Person 1: "If they say they're interested, you say “you want me to just kind of break down how that works real fast just to see if it might be something that might be a good fit?"
Person 1: “The prospect says, right, you go, okay, cool, I'll break it down for you, but just so I'm not wasting your time. How many names could you think come to mind that might also want to result just off the top of your head? And they'll go, oh, I think probably like three or four people I could think of. Or they'll be like, no one."
Person 1: "You'd be like, just, just ballpark for me if there's anyone you think might be slightly interested, how many people can you think of? And the keyword is “how many people can you think of”. If we say, how many people can you think of? Usually people start to actually, you know, think."

Person 2: "Okay, I understand. Then what happens when we ?"
Person 1: "They say none. And you're like, no one, come on. You gotta know someone, John. Like, you just kind of push them to say how many people in hypothetical reality.

Referral scripts - For Clients

Person 2: How do I make a referral script for clients?

Person 1: "Let’s talk about referral script templates for clients and how to ask for referrals in a way that's not pushy and benefits the clients. It's for people who have already signed up with you and have paid for your service or product."

Person 2: "Okay, I see. So how do we actually get our existing clients to refer more people?"

Person 1: "We want to ask for referrals at the right time. When we ask is just as important as how we ask."

Person 2: "Makes sense. So when is the right time to ask for referrals?"

Person 1: "The first thing we want to do is call every client around two weeks after they've joined, or when they've had their first big win with our program. It's important to ask when clients are happy and excited about the results they're getting."

Person 2: "Got it. And what about when clients are unhappy?"

Person 1: "Believe it or not, those moments are actually a good time to turn things around and over-deliver for the client. If we can solve their problem and make them happy, they may even become happier than clients who never had an issue in the first place. And happy clients are more likely to refer others."

Person 2: "Interesting. So we just need to follow this approach and ask for referrals religiously?"

Person 1: "Yes, exactly. If we call every client at the right time and ask for referrals, we can help more clients in the future and grow our business."

Person 1: We need to stop texting and asking for referrals. If we want high conversion rates, we need to do it over the phone. There's so much more social pressure.

Person 2: Why is social pressure important?

Person 1: They can't just ignore it. And they can't just say no, we can handle their objections. You wanna do it over the phone.

Person 2: Okay, so what do we do over the phone?

Person 1: We give them a reason for calling, then it is optional, but it's very effective. We give them something to create reciprocity bias.

Person 2: Reciprocity bias? What's that?

Person 1: A lot of times when you walk into a kind of a fancier store, what do they do? They give you a water bottle, right? And it's obviously a nice gesture, but the reason why is statistically people, if you gift them something first, they're more likely to spend more money because there's reciprocity bias.

Person 2: I see. So what do we give them?

Person 1: We give them something at the beginning of the call to create some reciprocity bias. And then we ask questions to get them to talk about their wins, what they're loving about our service or product.

Person 2: Why is that important?

Person 1: We get them into a really high emotional state. If they're talking about how much they love what we do, they're talking about their wins, they're talking about what's most exciting, that's the frame of mind that they're gonna be in.

Person 2: I get it. So what if we ask them what's going wrong?

Person 1: Then they're gonna be talking in that state of mind and that's where they're gonna be. We can direct someone's perspective to how they're viewing. We want to ask questions that make them talk about how happy they are.

Person 2: That makes sense. So what do we do after we get them in a good state of mind?

Person 1: We ask for the referrals. And we do it in a way that's in their best self-interest, not ours. We have this really amazing incentive for you to refer and it's really easy. All you need to do is send a text intro.

Person 2: Okay, got it.

Person 1: "That said, let's kind of dive into the script. This is a template, so fill it out, tweak it to make it fit your business. And then also this will change if it's the first time you're calling them or if you call the prospect in the, or a client in the past and you're asking for another referral. So that being said, here's how it goes. Hey, name. I was just thinking about you, so I thought I'd give you a call to see how you're doing."

Person 2: "Oh, okay. So we just call and check in, right? And the reason for calling can change depending on the situation?"

Person 1: "Yes, exactly. It might be because they had an amazing win, or maybe we heard they're unhappy and we want to solve it personally. We just want to make sure we're taking care of our clients at the highest possible level. So we call and say why we're calling."

Person 2: "Got it. And then you mentioned something about reciprocity bias?"

Person 1: "Right, that's optional but recommended. It's where we give them something, like free training or a gift, to show our appreciation. It's more about the gesture than the actual item."

Person 2: "Okay, I see. And then we start asking questions to get them into a good state of mind?"

Person 1: "Exactly. We want to make sure they're happy and see if there's anything else we can do to over deliver and help them. Then we ask them about what's been the most helpful thing so far in the program and what they're most excited about. We want to get them talking and feeling positive about their experience."

Person 2: "That makes sense. And I'm assuming we only ask for a referral if they're happy with our service?"

Person 1: "Yes, that's correct. We want to make sure they're satisfied before we ask for a referral. And even then, we want to approach it in a way that doesn't make them feel pressured or obligated."

Person 1: And then they start talking about what they're most excited about. Not, Hey, are you excited or no, it's like, what has you the most excited?

Person 2: So you mean we should start the conversation by asking them what they're most excited about, instead of asking if they're excited?

Person 1: Exactly, it's a better way to get them thinking about what they're really looking forward to.

Person 2: That makes sense. And then we ask them to tell us more about what specifically excites them?

Person 1: Yes, exactly. We want to get them talking about what they love and what they're looking forward to.

Person 2: Okay, and then we ask them about their biggest aha moment so far?

Person 1: Yes, that's another good question to get them thinking about their experience.

Person 2: And then we should make sure we focus on the positive throughout the conversation, right?

Person 1: Yes, we want to make sure they're talking about all the things they love about our program or service.

Person 2: Got it. And at the end of the call, we should summarize all the positive things they said and repeat it back to them?

Person 1: Yes, that way they feel heard and appreciated.

Person 2: And then we can mention our referral program and ask if they want to hear more about it?

Person 1: Exactly, but we want to make sure we're not pressuring them into anything. We're just letting them know about the program and if they're interested, we'll explain how it works.

Person 2: And we should ask for names of people they think might be interested in our program?

Person 1: Yes, that way we can follow up with those people later and it's easier for them to give us names than to make an introduction right away.

Person 2: I see. And then we can explain how the referral program works and send them a text template to use?

Person 1: Yes, it's a simple process and we want to make it easy for them to refer people to us.

Person 1: So, basically, we send a text to our client's friend introducing ourselves and telling them what we do. This creates an authority frame for us, and it's a value add for the friend. We wait for the friend to respond first, ideally, and if they don't, we send another message saying, "Hey, no worries, but we'd love to connect with you. Would you be available for a quick five-minute call? I'm available at this time or this time." Then we wait for them to respond, and if they don't, we call them out of the blue and do a typical set call. And we keep asking for more referrals.

Person 2: That sounds simple enough. How do we send the text intro to the client's friend?

Person 1: We text the intro to our client on the call and explain how to fill it out. They just need to put their friend's name in. It should already be filled out at the time we send it to them. Then, we walk them through the process of actually text-introing us to all the names they gave us.

Person 2: Okay, got it. And if they referred us in the past, we can tweak the messaging a little bit?

Person 1: Yeah, exactly. We don't need to be as scripted out in that case because they've already referred people. And remember, we need to set a time where we're going to call every single lead, so we don't do this by the seat of our pants. We should say, "Hey, at the two-week mark, I'm calling every single lead." Anytime there's a client win, make it a habit to call them immediately and close them on referring more people. And if a client's unhappy, make it a habit to call them, resolve the situation, and ask for more referrals.

Section 7.5: Organic Methods

Personal Brand: the overall process

Person 1: What is the macro big picture of generating leads with your personal brand?
Person 2: It's about creating authority and credibility, and converting your social media following into something you own, like phone numbers.

Person 1: What are some common mistakes people make when trying to generate leads with their personal brand?
Person 2: Many people focus too much on posting content and building a social media following, but don't actually convert that traffic into leads.

Person 1: What are the three big check boxes to follow in order to generate leads?
Person 2: The first one is having a link to get your free lead magnet and your bio so you can collect phone numbers. The second is messaging everyone who engages with your brand using a messaging framework. The third is posting content and growing your brand using a specific social media plan.

Person 1: Why is it important to collect phone numbers?
Person 2: It's important to collect phone numbers because it allows you to own your leads and communicate with them directly, rather than relying solely on social media algorithms.

Person 1: Why is engaging with followers and building relationships important?
Person 2: Engaging with followers and building relationships is important because it leads to more conversations, and more conversations lead to more conversions.

Person 1: What is Caleb's CMX social media plan?
Person 2: Caleb's CMX social media plan is a comprehensive plan that breaks down everything you need to know in order to grow your brand on social media.

Person 1: What is the ultimate goal of following these three check boxes?
Person 2: The ultimate goal is to generate good solid lead flow off of minimal organic traffic, by squeezing all the juice out of your following and turning those leads into sales.

Building a funnel from scratch: Overview

Person 2: How do I build a funnel from scratch?
Person 1: You need to build an opt-in page. This is for anyone who needs to drive traffic to their website or is trying to get their lead costs down. Whether your ads are already working or not, the process is the same.

Person 2: Alright, sounds good. So what's the funnel structure you use?
Person 1: It's just a three-step process. We start with an opt-in page that collects name, email, and phone numbers. It's mandatory to have phone numbers as it helps us optimize our ads and see the lead quality. After that it goes to a thank you page or a sales page where we sell something else to recruit some front-end ad spend.

Person 2: Okay, and what kind of things should we sell on the thank you page?
Person 1: You can sell a webinar where you sell something for a thousand to three thousand dollars or a low ticket offer with upsells, but you want to make sure there's congruence between the offer and what they opted in for.

Person 2: Okay, got it. So, if we already have a webinar or sales page in fulfillment we're selling, should we implement a thank you page now?
Person 1: Sure, if you have everything ready to go, there's no harm in implementing it. But it's not a priority, so don't stress about it.

Person 2: " So what do you think is the most important part of creating an ad campaign?"
Person 1: "All that matters is the creative, the headline. if you have the opt-in page with the headline, that page is gonna convert for the most part, but overall the headline contributes 95%.

Person 2: "So what's the first step in creating a successful ad campaign?"
Person 1: "The first step is to write the headline first together. We're gonna go over a lot of principles around writing headlines and kind of the process we take. And then second of all, we're gonna build the funnel around the headline. Again, it doesn't matter what funnel type it is, as long as we have an opt-in page with the headline we created."

Person 2: "Okay, got it. And once we have the opt-in page, what's next?"
Person 1: "Next, we need to create an MVP fulfillment for the free lead magnet we promise in the headline. If we're opting in for a free case study or free training, we'll make a very short version with the general concept. If the opt-in rate isn't good on this page, there's no reason to waste time trying to create something perfect."

Person 2: "I see what you mean. And once we have the MVP ready to go, we launch the funnel?
Person 1: "Exactly. If it works, meaning it has a high opt-in rate and we're attracting the right type of leads, then we'll make the freebie really good. if it doesn't work, we just keep testing until we cut the lead cost."

Person 2: "Okay, got it. So is testing a big part of creating a successful ad campaign?"
Person 1: "Yes, definitely. Testing is key. We want to put a lot of effort and emphasis on just testing the funnel and the headline on that funnel for what the opt-in is. The more we test, the cheaper the cost is going to be. It's the most cliche marketing thing, but it's true. Test, test, test, test, test."

Person 2: Can you give me an example of why testing is a big part of creating a successful ad campaign?

Person 1: When we were launching Air, we hadn't tested a lot of funnels in a while because we got one funnel to work. Truthfully, on one of the last offers we were running that was doing 4 million a month and it was running okay, it wasn't even that great of an opt-in rate. It was an expensive lead cost.,

Person 2: I see. What happened when you tested the funnel?
Person 1: We focused on just one constraint at a time. The first constraint we ran into was opt-in rate is really low and our cost per leads is really high. We launched eight new funnels the very next day with eight different headlines that were completely different from what we were offering.

Person 2: What happened after launching the eight new funnels to test?
Person 1: Two of the eight funnels started working and we were able to cut our lead costs dramatically. If something doesn't work, just focus on one constraint at a time and keep testing until you find what works. If you get something working okay and it's profitable, then maybe it's not the constraint for a while and you should just keep running it up until later.

Person 2: That's a good point. How do you keep improving efficiency while also maintaining profitability?
Person 1: You can hire someone on your team whose full-time job is the lower lead cost because your number one priority is increasing efficiency. You can increase how much money you're making from the leads, but with cost you can only cut so much.

Person 2: How can I get lead costs down by testing?
Person 1: You can get lead costs down just by changing the angle, by changing the messaging, and making it resonate with your audience.

Person 2: How do I know which message will resonate the most with my audience?
Person 1: Two different messages, two different headline angles of what the thing is will dramatically affect the market differently. One might appeal to a much broader set of the market and for that reason a much higher percentage of people click on it and opt-in.

Person 2: I see, so testing is important. How do you make the testing process efficient?
Person 1: When you're just trying to get opt-ins, it's really easy to test funnels because you can write a headline, create an MVP fulfillment for the headline, and it's more about the curiosity of the angle and what it is that you're promising than it is about the deliverable. And you can test really, really quickly, right? You can test eight funnels in a day. Again, I'm not saying you guys should create eight funnels out the gate to rip because you gotta spend a decent amount of ads to test each one.

Person 2: I see, that's good to know. So what's the math behind getting the cheapest leads?
Person 1: The higher the click-through rate, meaning what percentage of people who see the ad with the headline that's on the opt-in page click through, and then what percentage is the opt-in rate, how high is the clickthrough rate, how high is the Optum rate is going to equal the cheapest lead cost.

Person 2: Could you summarize how to build a funnel from scratch?
Person 1: "Start by creating a really simple lead magnet, like a one-page PDF or a short quiz, and focus on writing a killer headline that will make people want to opt in. Don't worry too much about the fulfillment of the lead magnet. Test the headline and see if people are interested in what you're offering. Once that people opt in and the funnel is converting, focus on creating a more robust lead magnet and fulfilling what was promised in the headline."

Person 2: What is so important about the headline?
Person 1: "It's what gets people to stop and pay attention, and if your headline isn't good, your funnel won't convert.

Choosing The "Big Promise" Of Your Headline

Person 2: “Whats the first step in creating a headline?”
Person 1: "The first step in creating a headline, is choosing the big promise that the headline's gonna be written around, it's an offer. We need to deliver a promise that the market wants. Choose the right big promise that appeals to the majority of our target audience."

Person 2: "So, how do we choose the right big promise?"
Person 1: "Choose a specific big promise that resonates with your market. People believe specific statements more than general ones." The more specific you are about the problem you solve and how you solve it, the more believable it is. When you understand the big promise that your market wants, then 80% of your headline is already written.”

Person 2: "Could you give me an example of a big promise?
Person 1: “You should check out what your competitors are advertising. Look for the big promise behind their headlines. For example, Frank Kern has ads about how to get new customers, how to get marketing courses for $4, and how to get consulting clients using ugly ads, so you can get an idea of what your competitors are advertising and what their big promises are.

Person 2: That's a good idea. How do I know which big promise to focus on?
Person 1: You should pick the one that has the highest percentage of the market dealing with times the highest level of pain and desire.

Person 2: “Can you give me an example of high levels of pain and desire?
Person 1: When we started doing air, we looked at what our competitors were advertising and what promises were being made. We found that people want more book sales calls, increased cash collected, decreased no-show rates, increased close rates, higher sales reps, and running ads. We wrote our headline around all of them and launched eight funnels, but we picked the one that we thought had the highest probability and wrote a headline around it.

Person 2: How can i know the people’s pain points?
People 1: You can talk to people in your market and really understand what their pain points are to figure out the best promise to focus on.

Person 2: How do I talk to people in my market?
Person 1: You can set calls yourself when you're first starting out to learn your market better than anyone. You only get the people who opted in for your service, and they're the highest intent leads.

Person 2: Okay, so what do I gain by talking to people in my market?
Person 1: "That's how you lower ad costs - by appealing to the masses within your market and writing a good headline around that."

Person 2: "I get what you're saying. So how do I write a good headline and appeal to the masses?

Person 1: " It's not about how you say it, it's about what you say. 90% of copywriting is what you say, not how you say it. And I think most people get that backwards. if you write really basic, simple copy and headlines, you can still get high opt-in rates if you're writing to what the market actually wants."

Headline Writing Principles - 1

Person 2: What is the point of the headline writing principles
Person 1: The more principles you apply from this, the higher your opt option rate's gonna be and the cheaper your cost per lead.

Person 2: What is the best mental model when thinking about writing headlines?
Person 1: Well, Nicola Tesla used to run his experiments by testing them in his head first. He would make it in his mind's eye and then start simulating it and looking for where it breaks. He would be able to fix it in his mind, and he'd run through it for days, weeks, months on one thing in his head.
Person 1: When you're doing something with ads, you want to test it out as much as possible in your head before you ever actually test something in reality.

Person 2: How can I improve my headline writing skills?
Person 1: "Other than following the principles, start studying psychology. Study all different types of schools of thought, classical type psychology, from a more traditional psychologist standpoint.
Person 1: Also, study psychology from copywriters who sell through one-to-many sales and learn from salespeople who've had thousands of one-on-one conversations, and what they've taken away from those read books like 'Influence' or 'How to Win Friends and Influence People'. The more you understand human beings, the better your thought experiments are gonna be because they're gonna be rooted in truth."

Person 2: "What is the first headline writing principle?"
Person 1: "You can't catch whales with minnow bait. It means who you write to is who you attract. Your headline is your bait, and depending on what bait you put on your opt-in page is who you are going to attract. If you're fishing with minnow bait, you're not catching whales. And if you're fishing with whale bait, you're not catching minnows. Your messaging should attract the right clients, and not the wrong ones."

Person 2: What's an example of a bad headline according to the first principle?
Person 1:For example, "How to get your first sales call ever" is not going to attract the audience I'm looking for. Even if I'm trying to target complete beginners, it's not going to work. It doesn't matter how cheap our lead cost is if they're not good leads.

Person 2: So how do I know that I'm attracting the right audience?
Person 1: The cost per qualified lead. You need to make sure your messaging is going to the right audience. You need to appeal to the right person, not the opposite. Ad platforms are advanced nowadays and will show your ad to whoever the messaging resonates with the most.

Person 1: But won't showing my ad to whoever resonates the most make the opt-in more expensive?

Person 2: Not necessarily. It's more competitive in the pool of the right people I'm trying to talk to. The goal is to get the cheapest qualified opt-ins, not just cheap opt-ins. That's why there's a type form in the funnel to check the lead quality.

Person 1: What if you only talk to the top people in your industry?

Person 2: Then I'm appealing to a much smaller segment of the market, and I'm alienating everyone else in between. I need to find the right balance and appeal to the right person.

Person 1: "That's paraphrased, but it's an important one. It's a simple one as you can say. Also, another thing too, you can actually do from a more practical level is adding dog whistles into your headline to call out exactly who it's for. All right? Or a pre-headline or a sub-headline. Like, you know, if your headline's too long. So it might be like sub-headline, like the, the pre-headline."

Person 2: "What's a dog whistle?"
Person 1: "Dog whistle is a term used to describe a message that is targeted towards a specific group of people. For example, if you're targeting coaches in a client-based business, you might add a sub-headline like 'for coaches in client-based businesses' to call out exactly who your message is for."

Person 2: "Okay, I get it. So what else can we do to make sure we're getting the right audience?"
Person 1: "It's important to think about what you don't say as well as what you do say. You want to make sure that you're not saying anything that will attract the wrong type of person. For example, if you want to attract business owners who are already established and want to scale their business, you don't want to say something like 'this is how to get more sales calls' because that might attract people who are just starting out and don't know anything about sales."

Headline Writing Principles - 2

Person 2: What is the second headline writing principle ?

Person 1: "All right. The second principle of a good headline is novelty, meaning it's new, it's out of the ordinary." The human brain is wired to notice new and out of the ordinary things. We can leverage this principle to get attention. It can't be generic or similar to something they've already tried in order to get a high opt-in rate."

Person2: Can you give me an example of novelty?
Person 1: Have you heard of this company called Traffic and Funnels? They helped coaches, consultants and agency owners and had this whole campaign running for years that pushed multiple eight figures.

Person 1: They had this two-step invisible funnel that gets them clients on demand or gets them a certain number of book sales calls. And it was the same funnel every other person was using, but they called it the invisible funnel to add novelty. They got some cheap opt-ins because it was really well done.

Headline Writing Principles - 3

Person 2: What is the third headline writing principle ?

Person 1: "Curiosity. Our headline needs to be the cliffhanger, and you don't want to reveal too much in the headline. You want to get them excited about the new thing, but not reveal how it works.

Person 2: What do I do if the headline is profitable?
Person 1: You can pay to get in front of as many people as you want.

Person 2: How can I increase my opt-in rate using curiosity?
Person 1: Impulse,not ration, is what drives high opt-in rates. Increase the amount of curiosity to avoid people being rational.

Person 2: What is the most expensive form of advertising?
Person 1: The more education you try to do in your advertising,the more expensive it's going to be..

Person 1: That makes sense. But what's the cheapest advertising we can do then?
Person 2: The cheapest advertising you'll ever do is high impulse advertising. The higher the impulse advertising is, the cheaper it's gonna be.

Headline Writing Principles - 4

Person 2: What is the fourth headline writing principle ?
Person 1: Believability.

Person 2: So, what are these four core principles you're talking about?
Person 1: The four core principles are curiosity, novelty, speaking to the right audience, and believability. And if you just run through these four core principles, I promise you your headline's gonna be really, really, really, really solid.

Person 2: What does believability mean?
Person 1: Believability is about credibility and proof. We want to overcome the market's skepticism by adding proof to our headline. That way, not only is there insane curiosity, there's novelty to it.

Person 2: I see. So, how can we add proof to our headline?
Person 1: You want to show proof in your headline, not just make promises. For example, you could say: "This allowed us to book 2,649 sales calls in a single month." If you add that into the headline and the result that you're promising is more sales calls and there's curiosity behind it, people will be excited about it.

Writing Your Headline

Person 2: How do I write a Headline?
Person 1: 95% of your results are gonna come from the headline. That's why we're putting so much time, energy, and thought just into writing a simple headline.

Person 2: Why is the headline so important?
Person 1: Well, the headline is what's going to get people to click and opt-in, so it needs to be attention-grabbing and make them want to learn more.

Person 2: Okay, so how do we come up with the best headline?
Person 1: Put yourself mentally into a purely hypothetical world and what you’re going to do is try to figure out what the highest converting headline would be if we had zero boundaries on what we had to fulfill. You're not in logical, rational reasoning mode, purely creative mode of coming up with ideas.

Person 2: Alright, so how long should the headline be?
Person 1: Length's not gonna hurt you in most cases. You can break it up into a pre-headline, a main headline and a sub-headline if you need to. A lot of times a longer headline can actually convert better. If the extra words are increasing the curiosity or if it's making it more believable, there's a good chance it's gonna help it more than it's gonna hurt it.

Person 2: Person 1: How do I get the headline to pass the checklist?
Person 1: Right, we put ourselves into the mind of the prospect and ask if it meets the first principle, if it's new and exciting, and if it creates curiosity. We need to make sure it's specifically for them and that it attracts the right person. We also need to make sure we have proof to back up our claims.

Person 2: Alright, got it. And how do we come up with the headlines?
Person 1: We created 31 AI generated templates for headlines, and these are all great starting points. You just fill in the blanks. Here's the process you're gonna follow:

- You're gonna write 20 unique headlines that are so irresistible that people in your ideal market won't be able to go to sleep at night because they're so curious to find out what it is.
- the top three to five headlines that you wrote, what you're gonna do is you're gonna look at it and you're gonna have these, the three to five over here and next to each one of 'em, you're gonna start playing with the headline one at a time until you get it to meet every single one of these criteria.
- Then we mold those headlines to meet the checklist that we have created.We want to refine and make sure we hit every single one of these points.

Person 2: And what if some of the headlines are missing some of the criteria?
Person 1: If any of them are missing, make sure you add those to the headline. If it's too long, add a sub-headline or a pre-headline to make sure it meets all those criteria.

Person 2: And what if we need more thoughts on our headlines?
Person 1: Go look at other headlines from your industry. See what other people who are crushing it are saying, who have a similar result that they're delivering.

Person 2: Okay, got it. And how long should we spend on creating a headline?
Person 1: You don't want to spend the next two months doing a headline. If you have to take longer than a day to do a headline, there's a problem. You're not moving fast enough.

Putting your headline into the funnel template

Person 2: How do I create a funnel template and put the headline?
Person 1: First thing you're gonna do is download the funnel template or you can create it from scratch. The design doesn't matter, just get the headline on the page, keep it super simple.

Person 2: Okay, got it. So what's next after creating the funnel template?

Person 1: First things first, opt-in page. Add your headline to the opt-in page, make sure it looks good on mobile, and make sure the phone number is mandatory on the opt-in page.

Person 2: Okay, that makes sense, what is the next step after creating the opt-in page?
Person 1: The biggest next thing is the qualification page where we are able to see and get insight on our lead quality and get immediate feedback. Create a tight form which is just like a Q and A, just a quiz ability to do like questions and quizzes.

Person 2: Got it. So we'll create a quiz to get insight on our lead quality. What kind of questions should we ask?
Person 1: We'll give you guys a list of questions to add. Depending on your market, you have to give a reason why you're asking them. So a lot of times even saying something like, Hey, we're giving you some free bonuses. Answer this quiz to these quick questions so we can customize them for you and then just send 'em some extra stuff based on their answers.

Person 2: Alright, that sounds good. What's next on the checklist after creating the quiz?
Person 1: Embed the Typeform on the page. We wanna make sure that we're embedding it on the qualification page rather than linking out to Typeform. That way we can make sure our Facebook pixel is able to fire. Make sure the Typeform forwards to the thank you page on completion.

How To Create Your MVP Without Damaging Your Brand

Person 2: What is an MVP?
Person 1: Minimal Viable Product.

Person 2: Got it. How do we create the MVP fulfillment?
Person 1: The easy way to create an MVP fulfillment is to create, for example, a one page PDF that breaks down exactly what you do like really quickly or a quick five minute video explaining it.

Person 2: Okay, and how should we deliver the MVP fulfillment?
Person 1: If you're just starting to get this thing live, don't put the freebie on the thank you page where they can see it on the spot. Instead, have it sent through email a few hours after they opt in.

Person 2: I see. Should we add anything else to the MVP Fulfillment Email?
Person 1: Yes, add a bunch of free other stuff into the email. So with an MVP fulfillment, it's not something we're super proud of. So just be like, Hey, this is a brand new thing I'm filming a longer one later. If you're not gonna create a longer one, send the free thing and over-deliver with a bunch of other free bonuses in that email that take you like five minutes to add in.

Person 2: Got it. And what if we need to make improvements to the MVP?
Person 1: You can launch before the MVP is done if you want. And then on the thank you page, just say thanks for doing it. Join the wait list. It'll be sent out in the next X amount of time.

Person 2: What if the MVP fails?
Person 1: Repeat the process, change a variable and compare the results till you resonate with the market.

Personal Brand: Creating Your Bio

Person 2: Why do I create a bio?
Person 1: The idea is to direct people to follow us and opt-in to our free lead magnet. Once we get a phone number, we can reach out to the lead, set up a meeting, and close the deal. The end goal is to deliver amazing results for our clients.

Person 2: Okay, so what's the bio template?
Person 1: The first bullet point in your bio should say, "I help avatar your market to whatever result you deliver, buy whatever your unique method is without, and then whatever the big pain point of the market is." This will attract your ideal market.cYou can write a credibility sentence about your past accomplishments. This will establish your credibility in your space. Sign off with a call-to-action to get your free training on whatever your lead magnet is. People should be able to click the link in your bio and opt-in.

Personal Brand: Messaging framework

Person 2: How do I turn followers into booked appointments?

Person 1: The first part of this is who you message. We have to convert people. We have to start conversations because conversations lead to conversions. Message everyone who engages with your brand ,even for a like or a comment.

Person 2: Wow, so what's the messaging framework that we should follow?

Person 1: It starts with the social context, "Hey, thanks for the follow." or, "Hey, saw your comment on my last post and thought I'd shoot you a message." You're just getting a reason for reaching out and then you say, "I just created a lead magnet," whatever your free thing is that you're offering that's on your opt-in page, The link for the opt-in page should be in your bio.. It shows you how to headline whatever the big promise is, whatever it actually teaches people how to do.

The 3 free traffic methods

Person 2: What are the main traffic methods?
Person 1: Well, the first one is outbound methods. Basically, you find people in your market, whether it's on Facebook groups or in LinkedIn or somewhere else, start conversations with them, and turn those conversations into set calls and then those set calls into close calls and those close calls into clients.

Person 2: That's interesting. So, what's the second traffic method?
Person 1: The second method is affiliates. Essentially, you're finding people who've already spent millions of dollars building their audience, who will promote your offer for you in return for a percentage of the sales that you make.

Person 2: That sounds good. What's the third traffic method?
Person 1: The third method is free methods. This includes anything that doesn't require a paid ad, such as search engine optimization, content marketing, social media, and so on.

Person 2: That's great. So, which method is the best traffic method?

Person 1: Well, every single one of these methods works, but the key is to pick one and make it work. If you can't scale to seven or even eight figures off of one traffic source, it's probably not a good traffic source. Choose either outbound or affiliates as your primary free traffic method. You're gonna commit to one.

Person 2: Okay, got it. What about the pros and cons of personal brands?
Person 1: The pro of personal brand is warm leads. The only con is that it's not a hundred percent in your control. You can't increase the volume of how many people are watching your videos. If you're already doing a personal brand, you're already generating leads that way, we're gonna optimize it that way.

Person 2: "Which is the best approach for traffic, outbound or affiliates?"
Person 1: "Affiliates are probably the way to go versus outbound. But the question is, how many people are there in your ideal audience already on their emails? If there's a ton of potential affiliates, it's better to outbound to get one affiliate who will get you in front of a million people than just manually reaching out to potential clients."

Person 2: "I see. So, how do I find affiliates?"
Person 1: "Anybody with an audience, someone who's like a guru,an influencer, a company, a brand, or maybe the founder of a Facebook group. It's literally any single person who has the audience that you're trying to get in front of. It's best to just use other people's audiences.

Person 1: "Is it easier to use affiliates with B2B or B2C?"
Person 2: " It's easier to do affiliates with B2C than with B2B. But it doesn't mean that you can't find good affiliates for B2B. It just might be better to do outbound if that's the case scenario."

Person 1: "Okay, that makes sense. So, which one do you think is more effective, affiliates or outbound?"
Person 2: "Both work, and you have to do outbound for both of them. But if you wanna follow up with affiliates and really pound the follow-up game trying to get them to promote, it's really high leverage. Or do you wanna just start reaching out to people and get one client at a time? It depends on which one you wanna do more and which one excites you more.

Person 2: If i'm not locking in affiliates or we're not scheduling calls with our ideal market, what do i do?
Person 1: Then the messaging is off and all we need to do is tweak the messaging.