

Product Case Study: Webinar Onboarding Experience for Drop Servicing Mentorship Program

Role: Product & GTM Strategy Lead

Timeline: Jan 2024 – Apr 2024

Objective: Design and deliver an MVP onboarding flow to convert prospective students into booked calls within 72 hours.

THE
ULTIMATE
BUSINESS STARTUP

(I MADE \$104,717 IN THE FIRST 5 MONTHS OF
STARTING MY REMOTE ONLINE BUSINESS AND
YOU CAN DO THE SAME)



Problem Statement

Xen's mentorship program teaches aspiring entrepreneurs how to start a lawn care or snow removal business and automate fulfillment using subcontractors. Prior launches struggled to generate consistent, qualified student leads at a profitable cost.

Key issues:

1. Low registrations from cold traffic - difficulty standing out in a saturated “make money online” niche.
2. High cost per lead (\$10–\$15) made scaling unprofitable.
3. Low attendance rates (<50%) reduced exposure to Xen's content and offer.

The existing webinar funnel had unclear onboarding steps, lacked proof to overcome skepticism, and failed to sustain engagement from registration to webinar day.

Without a reliable acquisition engine, the program's revenue was unpredictable and scaling would be difficult.



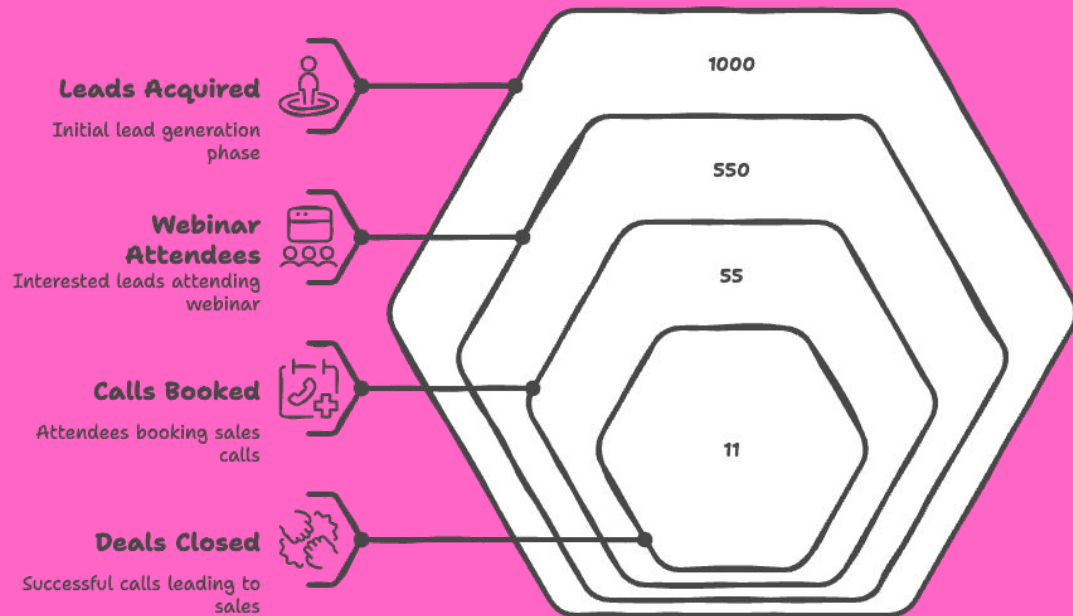
Goal & Success Metrics

Primary Goal: Drive 550+ qualified webinar registrations in 72 hours

North Star Metric: Qualified calls booked from webinar attendees

KPIs:

- Cost per lead <\$10
- 55%+ webinar attendance
- ≥ 65% completion of webinar content.
- 10% Call Booking Conversion
- 50+ booked calls



Research & Target Audience

Conducted audience research via:

- Conducted 10 customer interviews with aspiring entrepreneurs interested in local service businesses.
- Reviewed >100 comments on TikTok, Instagram, and YouTube videos about service business automation.
- Identified recurring push factors and hesitations to inform funnel content and offer positioning.

User Journey Insights from Previous Webinar:

- Drop-off was highest between registration and webinar attendance.
- Skepticism peaked before registration due to distrust in online business models.



Name: Jordan M.

Age: 27

Background: Works full-time in retail management; tired of long hours and low pay.

Goals: Replace income within 6–12 months. Build a business that can be automated to free up evenings/weekends.

Hesitations: No business ownership experience. Limited capital for startup. Afraid of getting “stuck” doing physical work.

Motivators: Financial freedom, flexibility, proof from mentor (Xen) that model works.



Name: Melissa R.

Age: 34

Background: Runs a small cleaning business solo; physically exhausting work with unpredictable income.

Goals: Transition to a business model where she manages subcontractors instead of doing the labor. Hit \$8K–\$10K/month consistently without burnout.

Hesitations: Stuck trading time for money. Unsure how to hire and manage subcontractors. Wants to scale beyond her own capacity.

Motivators: More family time, recurring revenue, proven roadmap to \$100K+ per year.

Prioritization Framework

Potential MVP Feature	Impact	Effort	Decision
Welcome Video	High	Low	Included
Gamified Attendance Tracker	Medium	High	Backlog
Pre-webinar “Ask me anything”	High	Medium	Included

Pain Points & Hesitations

Push Factors – Why They’re Ready to Start Now

1. Hate their 9–5 and feel trapped in a low-income or exhausting job.
2. Tired of trading time for money with no scalable income path.
3. Want more freedom to choose when and where they work.
4. Desire to earn \$8K–\$10K+/month without doing the physical labor themselves.

Hesitation

Impact if Unresolved

Don’t know how to start or structure a local service business/find and manage subcontractors

Could lead to no action taken

Fear of being “stuck” doing physical labor

Reduces appeal of model

General uncertainty/distrust with online business models

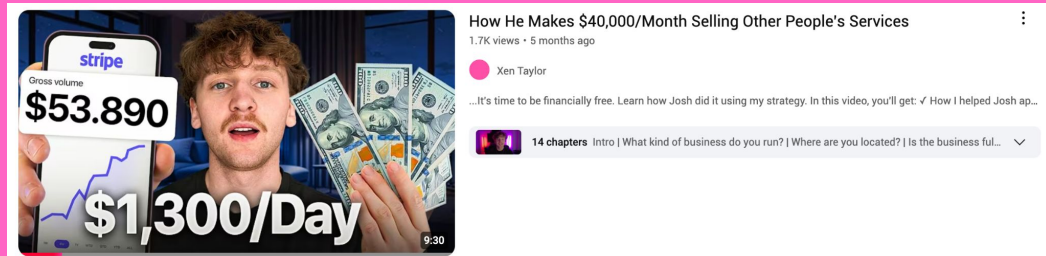
Lowers trust in Xen’s program and increases likelihood they ignore the webinar entirely.

How We Solved Key Hesitations

Hesitation	Solution
Don't know how to start or structure a local service business	Xen's webinar included a step-by-step launch roadmap to give clear, actionable first steps (they learn how to start)
Fear of being “stuck” doing physical labor	Ads include case studies showed students running businesses 100% remotely.
General uncertainty/distrust with online business models	Xen's \$50K/month proof screenshots, and student success stories

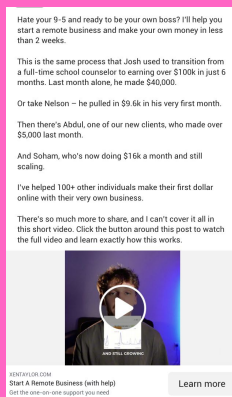
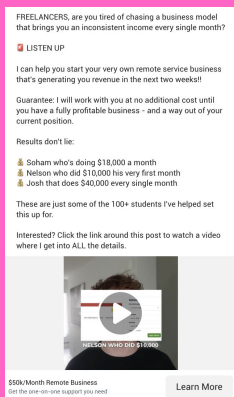
Extra Supporting Tactics:

1. Automation: SMS + email sequences kept registrants engaged and reminded them of the opportunity, reducing no-shows.
2. Social Proof in Ads: Highlighted Xen's track record + testimonials in ad creative to preempt skepticism before the webinar.
3. Interactive Webinar Format: Live Q&A + polls to address audience concerns in real time.

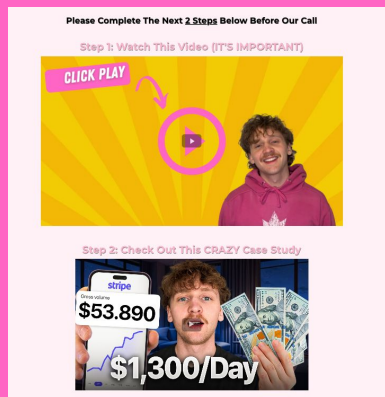


MVP Solution Design Visuals

Facebook & Instagram ads targeting aspiring entrepreneurs, side hustlers, and service business owners.



Optimized webinar registration page with Xen's \$50K/month proof + testimonials.



Live 90-min "Start Your Drop Servicing Business" webinar with Q&A.

Notes:

- Ads become "Acquisition Entry Points."
- Registration page described as "First touchpoint in onboarding flow."

Ready to Get Started? Here's What to Do Next.

Use the calendar link in chat to book a call with my team.

We will walk you through:

- Where you're at now
- What your path could look like
- The support we will provide

Only apply if you're genuinely ready to do the work and have some capital ready to invest.



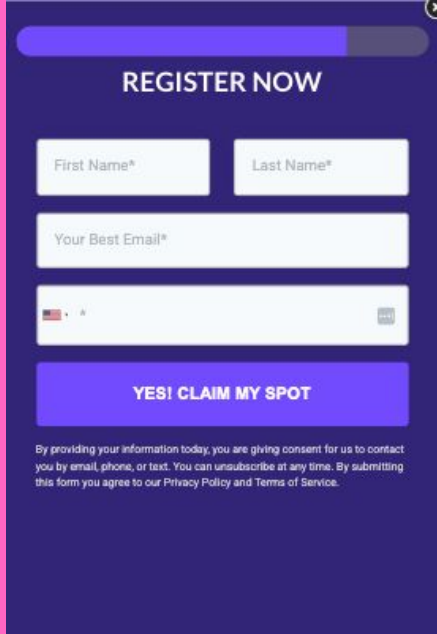
Direct CTA to book a 1:1 call with Xen's team for program enrollment.

How to go from a \$0/mo business to \$10K+/mo business in 60 days

...By selling in-demand home services you don't fulfill yourself.

(even if you've never run a business before)

Product Artifacts



REGISTER NOW

First Name*

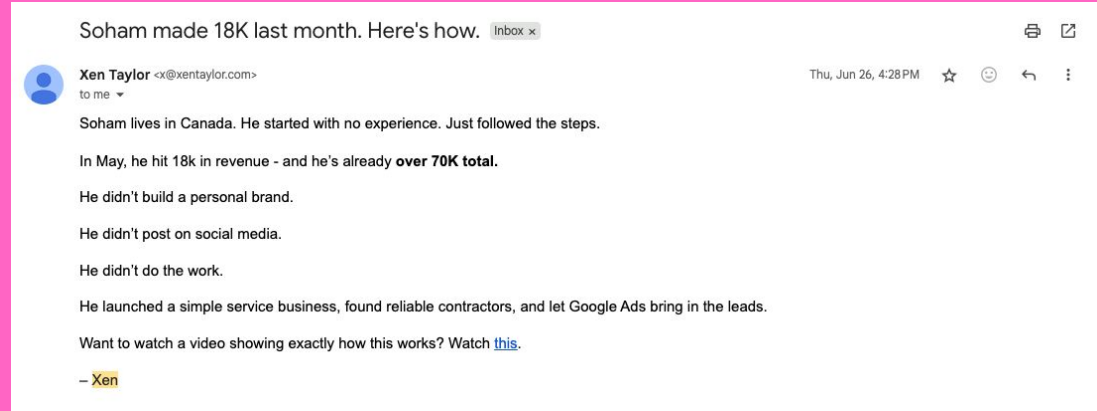
Last Name*

Your Best Email*

YES! CLAIM MY SPOT

By providing your information today, you are giving consent for us to contact you by email, phone, or text. You can unsubscribe at any time. By submitting this form you agree to our Privacy Policy and Terms of Service.

The above form automatically popped up on the webinar registration page upon completion of the webinar explanation video to collect lead info to nurture before webinar.



Emails similar to the above were used to nurture leads before the webinar to boost show up and engagement rates.

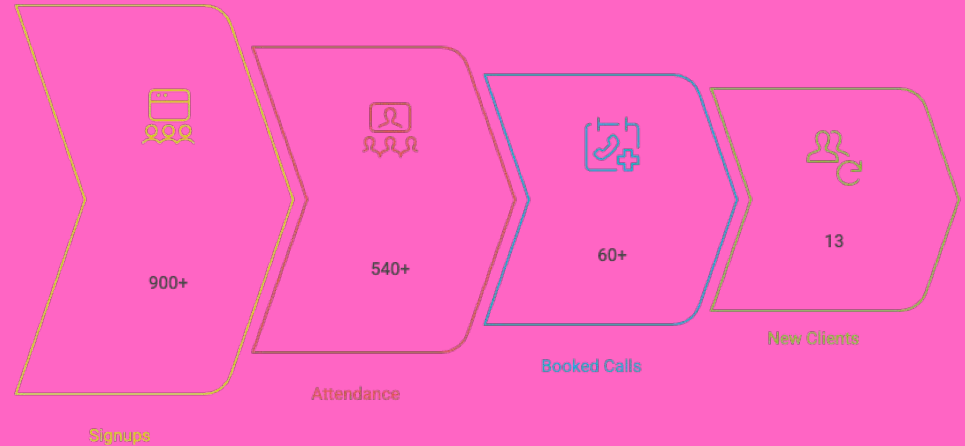
Launch & Results

Launch: \$10,000 ad spend over 72 hours targeting entrepreneurship & side hustle audiences

Results:

- 900+ webinar signups
- 60% attendance rate (goal: 55%)
- 72% of attendees stayed for >75% of webinar content.
- 60+ booked calls
- 13 new clients
- CPL: \$11.10 (↓ 26% from previous campaigns)
- \$40,000+ cash collected, \$60,000+ revenue

Webinar Performance: Ad Spend to Clients



Iterations & Learnings

Post-launch improvements:

- Added 2-min welcome video on thank-you page to boost excitement
- Retargeting ads to no-shows with webinar replay link
- Expanded targeting to international audiences (UK, Canada) after initial success

Key Takeaways:

- Clear, fast path from ad click to booked call drove urgency
- Automation improved attendance and reduced manual work
- Leveraging Xen's credibility increased trust & conversion

What I'd Do Next:

- Explore interactive onboarding elements during webinar (checklist, worksheet, etc.)
- Add post-webinar mini-course for no-booking attendees to incentivize bookings

Product Case Study: Client Qualification Engine for Sales Efficiency

Role: Automation Lead / Internal Product Owner

Timeline: Jan 2024 – Apr 2024

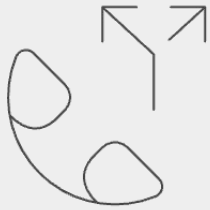
Objective: Design and implement a lead qualification and confirmation system to increase show rates, reduce wasted sales time, and improve overall revenue capture.



Problem Statement

Revo Consulting manages sales for multiple high-ticket accounts generating over \$300K/month. A growing number of no-shows and low-quality leads were limiting revenue potential.

Call Qualification/Show Rate



30%
Qualified +
Showed Calls




3 out of 10 booked calls



70%
Unqualified Or
No-Show Calls



7 out of 10 booked calls

Made with  Napkin

Key Issues Identified:

1. ~50% of booked calls were not showing up/canceling right before meeting time
2. ~40% of showed calls were with unqualified or low-intent leads.
3. No-show rate was reducing the availability of appointment slots for better prospects.
4. Sales reps were spending significant time on leads that would never convert.

Impact:

- Missed revenue from wasted call slots.
- Lower sales team efficiency.
- Declining morale from repeated no-shows.

Goals & Success Metrics

North Star Metric:

Increase the percentage of showed and qualified calls on the sales calendar.

Success Metrics:

Reduce no-show rate from 50% → <30%

Reduce unqualified call rate from 40% → ≤ 20%.

Increase total revenue capture by increasing show/qualification rate.

Note:

Hitting these metrics would allow for 56% (70% show x 80% qualified) of bookings to be true sales opportunity, a strong improvement from 30% with former metrics.

Research & Stakeholder Insights

Research Methods	Key Insights
Stakeholder Interviews: Spoke with 4 sales reps across multiple client accounts to understand lead quality frustrations.	Many low-quality leads booked calls via automated funnels with no human interaction beforehand.
CRM Data Analysis: Reviewed 3 months of lead source, appointment, and outcome data across \$300K+/month accounts.	Prospects who did not confirm within 4 hours of their scheduled call had a 70%+ chance of being a no-show.
Pattern Mapping: Compared show/no-show rates and close rates by source and pre-call process.	No standardized pre-call qualification process; reps applied their own criteria inconsistently, leading to uneven lead quality.

Pain Points & Prioritization Decisions

We identified the following sales team pain points and prioritized solutions based on impact and implementation effort.

Pain Point	Why It Mattered
Calendar filled with low-quality calls	Reduced conversion rates & wasted rep time
High no-show rate for unconfirmed calls	Wasted slots that could be given to high-quality prospects
No consistent pre-call qualification process	Inconsistent lead quality across reps

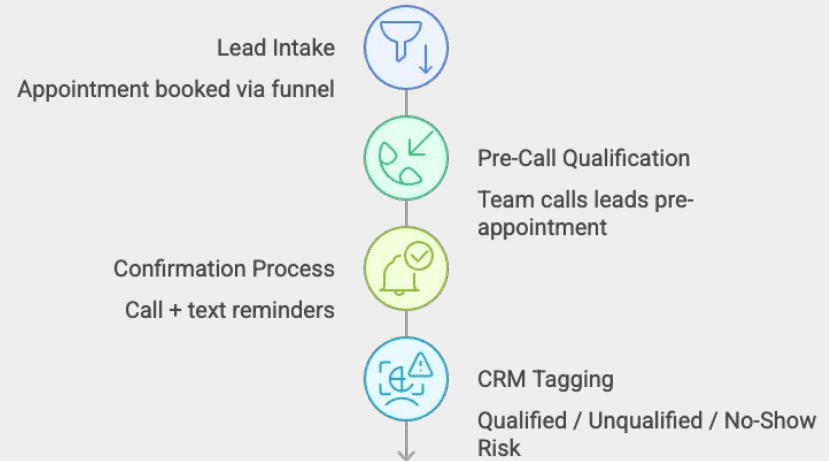
Potential Feature	Impact	Effort	Decision
Pre-call qualification calls	High	Medium	Included
4-hour confirmation rule with auto-release	High	Medium	Included
Multi-touch confirmation texts	High	Low	Included
AI lead scoring	High	High	Backlog

MVP Solution Design

Core Flow:

1. Lead Intake: Appointment booked via client funnels → automatically pushed to CRM.
2. Pre-Call Qualification: Dedicated team calls new leads within 30 minutes of booking to verify fit and interest.
3. Confirmation Process:
 - a. Call + text sequence to confirm attendance (24 hour before appointment, 12 hour before appointment, 8 hour before appointment, 4 hour before appointment unless confirmed).
 - b. If no confirmation within 4 hours of call → slot labeled “Free” so another lead can book.
4. CRM Tagging: Leads tagged as “Qualified,” “Unqualified,” or “No-Show Risk” for routing and reporting.

Streamlined Lead Management Process

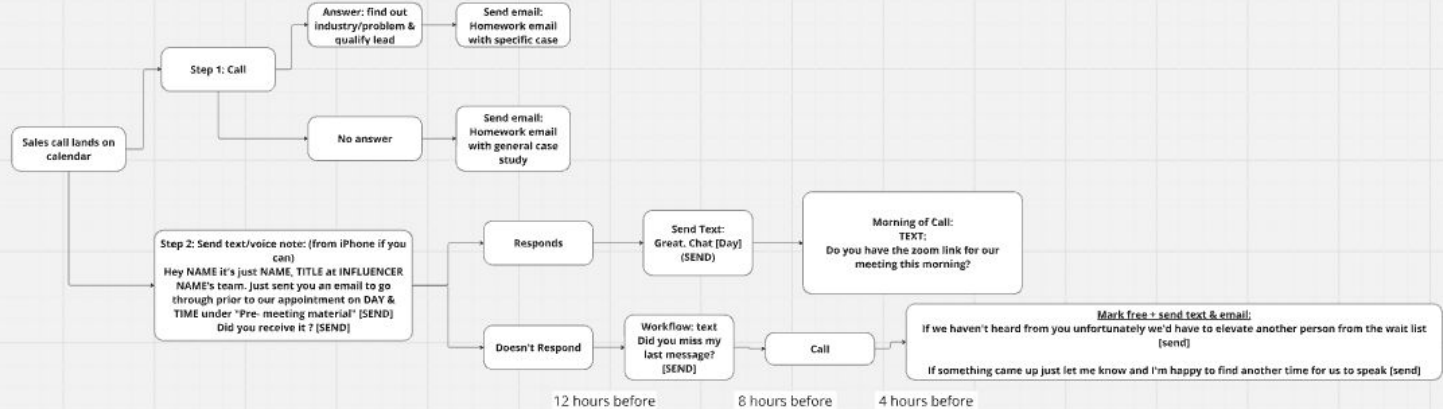


Product Artifacts

PRE CALL PROCESS

LESS is more.
Less text,
less emails,
less communication,
less words

Fridays/Day before
holiday Call to double
confirm



Email Example:
Subject Line: Pre - meeting Material

Hey John,

Looks like you booked in to have a chat at DATE & TIME to possibly get help to get OUTCOME.

Here is how we helped [specific case study] reach [outcome in time frame]

It will give you much more context for our call.

Let me know if you have any questions.

NAME

Launch & Results

Launch Plan:

- Rolled out to one high-volume account first for testing.
- Monitored lead flow, show rates, and rep feedback before scaling to all accounts.

Results (First 30 Days):

- No-show rate dropped by 50% (from ~50% to 25%).
- Unqualified call rate dropped from 40% to 19%.
- Total monthly revenue across tested account increased by ~91% due to higher show/qualification rates.

	Month Before	Month After
Show Rate	50%	75%
Qualification Rate	60%	81%
Close Rate	38%	36%
Cash Collected	\$94k	\$180k

Iterations & Learnings

Key Takeaways:

1. Addressing lead quality at the source (pre-call qualification) had the biggest downstream effect on both show rates and revenue (more impactful than any single calendar or reminder tweak).
2. Multi-touch confirmation and clear cut-off rules turned missed confirmations from wasted slots into opportunities to rebook high-intent leads.
3. Starting with one high-volume account allowed for rapid iteration and rep buy-in before scaling.
4. Combining automation with human touch struck the balance between efficiency and trust, making the process scalable without feeling impersonal to prospects.

Post-Launch Changes:

Objective: Maximize use of freed appointment slots to increase the number of high-intent sales conversations without increasing total lead volume.

What We Implemented:

1. **Free Slot Trigger** - When a booked appointment was unconfirmed at T-4 hours, CRM automation marked the slot as “Free” and flagged it for reallocation.
2. **Future Appointment Pull-Forward**
 - a. If no unbooked hot lead was available, reps called upcoming confirmed leads (within the next 1–2 days) to offer them the freed slot earlier.
 - b. This reduced the lead’s wait time, increased the chance of momentum-driven closes, and increase time slot utilization.