

UNIVERSAL MARKETING PLAYBOOK

Launch & Drive Strategy for ANY Project + Optimization SOPs

Version 1.0 - September 2025

PLAYBOOK OVERVIEW

Purpose

Universal framework for launching new projects and optimizing existing ones using our GHL-centered, AI-enhanced marketing stack.

Scope

- **New Project Launch:** 0 → \$10K+ monthly revenue in 30 days
- **Existing Project Growth:** Optimization strategies for scaling to \$50K+ monthly
- **Tools:** GHL + 5 essential AI tools (Claude, Apollo, Instantly, Midjourney, Analytics)
- **Team:** 5-person streamlined marketing team

Projects This Applies To

- ✓ Startup Church/Trust Services
 - ✓ FAST Funnels AI Agency
 - ✓ FullPotential.ai Consciousness Consulting
 - ✓ BRICKS TOKEN Launch
 - ✓ Custom GPT Marketplace
 - ✓ Fi-Art Gallery
 - ✓ Any future ecosystem project
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DECISION TREE: NEW vs EXISTING PROJECT

NEW PROJECT LAUNCH

Indicators:

- No existing revenue stream
- No established audience or customer base
- Need to build from ground zero
- Timeline: 30 days to first revenue

→ Use Section A: PROJECT LAUNCH SOP

EXISTING PROJECT OPTIMIZATION

Indicators:

- Already generating some revenue (\$1K+ monthly)
- Has existing customers/audience
- Need to scale and optimize performance
- Timeline: 60 days to 3-5x current revenue

→ Use Section B: PROJECT GROWTH SOP

SECTION A: NEW PROJECT LAUNCH SOP

PHASE 1: PROJECT FOUNDATION (Days 1-7)

Day 1-2: Project Definition & Market Research

1.1 Project Definition (4 hours)

Responsible: Marketing Director + Project Lead **Tools:** Claude Sonnet 4, Apollo.io

Deliverables:

- ☐ **Value Proposition:** One-sentence description of unique value
- ☐ **Target Market:** Specific customer avatars with demographics/psychographics
- ☐ **Pricing Strategy:** 3-tier pricing structure with clear differentiation
- ☐ **Revenue Goal:** Monthly revenue target (recommended: \$10K minimum)

Template Questions:

- What specific problem does this solve?
- Who desperately needs this solution?
- What's the maximum they'd pay for this outcome?
- How is this different from existing solutions?
- What's the easiest way to deliver initial value?

1.2 Competitive Analysis (3 hours)

Responsible: Lead Generation Specialist **Tools:** Apollo.io, Google Analytics, Claude

Research Checklist:

- ☐ **Direct Competitors:** 5 companies solving same problem
- ☐ **Pricing Analysis:** Competitive pricing landscape
- ☐ **Marketing Channels:** Where competitors find customers
- ☐ **Value Gaps:** What competitors don't offer
- ☐ **Market Size:** Total addressable market estimation

1.3 Customer Validation (3 hours)

Responsible: Marketing Director **Tools:** LinkedIn, existing network, Claude for interview questions

Validation Process:

- ☐ **10 Customer Interviews:** Validate problem and willingness to pay
- ☐ **Messaging Testing:** Test value proposition language
- ☐ **Price Sensitivity:** Confirm pricing assumptions
- ☐ **Channel Preference:** How customers prefer to be reached

Day 3-4: GHL Foundation Setup

2.1 GHL Configuration (6 hours)

Responsible: Campaign Manager **Tools:** Go High Level, Midjourney

Setup Checklist:

- ☐ **Sub-Account Creation:** Dedicated GHL account for project
- ☐ **Brand Identity:** Logo, colors, messaging (Midjourney + Claude)
- ☐ **Base Funnel Structure:** 3-page minimum (Landing → About → Contact)
- ☐ **Email Sequences:** 7-day nurture sequence template
- ☐ **SMS Automation:** Basic lead follow-up sequence
- ☐ **Calendar Integration:** Appointment booking system
- ☐ **Payment Processing:** Stripe integration for immediate revenue collection

2.2 Lead Magnet Creation (4 hours)

Responsible: Content Manager **Tools:** Claude, Midjourney, GHL

Lead Magnet Options:

- ☐ **PDF Guide:** "Complete Guide to [Problem Solution]"
- ☐ **Video Training:** 15-minute solution overview
- ☐ **Free Tool:** Calculator, assessment, or mini-service
- ☐ **Case Study:** Success story with specific results

Day 5-7: Content & Campaign Creation

3.1 Content Library Development (8 hours)

Responsible: Content Manager + Campaign Manager **Tools:** Claude, ChatGPT, Midjourney

Content Checklist:

- ☐ **30 Social Media Posts:** Mix of education, social proof, calls-to-action
- ☐ **5 Blog Articles:** SEO-optimized thought leadership content
- ☐ **Email Sequence:** 7-day nurture sequence from lead magnet to sale
- ☐ **Video Content:** 5 short explainer videos (Loom/iPhone)
- ☐ **Visual Assets:** 20 graphics for social media and ads (Midjourney)

3.2 Lead Generation Setup (6 hours)

Responsible: Lead Generation Specialist **Tools:** Apollo.io, Instantly.ai, LinkedIn

Outreach Preparation:

- ☐ **Prospect Lists:** 500+ qualified prospects in Apollo.io
 - ☐ **Email Templates:** 3-touch sequence for cold outreach
 - ☐ **LinkedIn Strategy:** Connection request + follow-up sequence
 - ☐ **Cold Calling Script:** For high-value prospects
 - ☐ **Referral Program:** Incentivize existing network referrals
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PHASE 2: LAUNCH EXECUTION (Days 8-14)

Day 8-10: Campaign Launch

4.1 Multi-Channel Launch (All Hands)

Responsible: Entire Team **Tools:** GHL, Apollo, Instantly, social platforms

Launch Sequence: Day 8 Morning:

- ☐ **Website Goes Live:** Complete funnel with lead magnet
- ☐ **Social Media Announcement:** Coordinated posts across platforms
- ☐ **Email to Existing Network:** Personal announcement to warm contacts
- ☐ **LinkedIn Article:** Thought leadership piece announcing project

Day 8 Afternoon:

- ☐ **Apollo Cold Email Campaign:** First 100 prospects contacted
- ☐ **LinkedIn Outreach:** 20 personal connection requests
- ☐ **Content Marketing:** First blog post published and promoted

Day 9-10:

- ☐ **Scale Outreach:** 50 new prospects daily via Apollo/Instantly
- ☐ **Social Media Content:** Daily posts driving to lead magnet
- ☐ **Networking:** 5 partnership/collaboration conversations
- ☐ **PR Outreach:** 3 podcast/interview opportunities pursued

4.2 Performance Monitoring Setup (2 hours)

Responsible: Marketing Director **Tools:** GHL Analytics, Google Analytics

Tracking Dashboard:

- ☐ **Traffic Sources:** Where visitors come from
- ☐ **Conversion Rates:** Lead magnet opt-in rate (target: 15%+)
- ☐ **Lead Quality:** Qualification scoring and follow-up rates
- ☐ **Sales Metrics:** Consultation booking rate (target: 25%+)

Day 11-14: Optimization & Scaling

5.1 Performance Analysis (Daily)

Responsible: Marketing Director + Campaign Manager

Daily Review Checklist:

- ☐ **Traffic Analysis:** Source performance and cost per visitor
- ☐ **Conversion Optimization:** A/B testing headlines, CTAs, forms
- ☐ **Lead Quality Assessment:** Qualification rates and sales potential
- ☐ **Outreach Performance:** Response rates and meeting bookings

5.2 Rapid Iteration (Based on Data)

Responsible: Content Manager + Campaign Manager

Optimization Actions:

- ☐ **Underperforming Content:** Replace within 24 hours
- ☐ **Low-Converting Pages:** A/B testing new versions
- ☐ **Outreach Scripts:** Refine based on response rates
- ☐ **Pricing Strategy:** Adjust based on market feedback

PHASE 3: SALES ACCELERATION (Days 15-21)

Day 15-17: Sales Process Optimization

6.1 Consultation Process Refinement

Responsible: Marketing Director **Tools:** GHL Calendar, zoom, Claude for objection handling

Sales Process Checklist:

- ☐ **Consultation Script:** Standardized discovery process
- ☐ **Objection Handling:** Responses to common concerns
- ☐ **Proposal Template:** Standardized pricing and service delivery
- ☐ **Follow-up Sequence:** Automated nurturing for non-immediate buyers

6.2 Social Proof Collection

Responsible: Content Manager

Social Proof Strategy:

- ☐ **Early Customer Testimonials:** Even from pilot/beta users
- ☐ **Case Study Development:** Document first success story
- ☐ **Video Testimonials:** More compelling than written testimonials
- ☐ **Social Media Proof:** Customer posts and engagement

Day 18-21: Pipeline Development

7.1 Lead Nurturing Optimization

Responsible: Campaign Manager **Tools:** GHL Email/SMS automation

Nurturing Enhancements:

- ☐ **Segmented Sequences:** Different paths for different lead types
- ☐ **Behavioral Triggers:** Automated responses to website actions
- ☐ **Personal Outreach:** Direct contact for high-value prospects
- ☐ **Retargeting Campaigns:** Ads to website visitors who didn't convert

7.2 Conversion Rate Optimization

Responsible: Marketing Director + Campaign Manager

CRO Focus Areas:

- ☐ **Landing Page Optimization:** Headlines, copy, form placement
- ☐ **Consultation Booking:** Remove friction from scheduling process
- ☐ **Trust Building:** Add credibility signals and risk reversal
- ☐ **Urgency Creation:** Limited-time offers or scarcity elements

PHASE 4: REVENUE GENERATION (Days 22-30)

Day 22-26: Closing & Delivery Preparation

8.1 Sales Acceleration

Responsible: Marketing Director

Closing Strategies:

- ☐ **Proposal Follow-up:** Systematic follow-up for outstanding proposals
- ☐ **Objection Resolution:** Address concerns preventing commitment
- ☐ **Payment Plans:** Flexible options to reduce financial barriers
- ☐ **Immediate Value:** Quick wins to demonstrate capability

8.2 Service Delivery Setup

Responsible: Campaign Manager + relevant service team

Delivery Preparation:

- ☐ **Client Onboarding:** Streamlined process for new customers
- ☐ **Project Management:** Systems for tracking and delivery
- ☐ **Communication Protocols:** Regular updates and check-ins
- ☐ **Success Metrics:** How to measure and report client results

Day 27-30: Scaling & Future Planning

9.1 Performance Review

Responsible: Marketing Director + entire team

30-Day Review Metrics:

- ☐ **Revenue Generated:** Target \$10K+ in commitments/sales
- ☐ **Lead Generation:** Total leads and cost per lead
- ☐ **Conversion Rates:** Each stage of funnel performance
- ☐ **Customer Acquisition Cost:** Total marketing spend ÷ customers acquired

9.2 Scaling Strategy

Responsible: Marketing Director

Growth Planning:

- ☐ **Successful Channel Identification:** Double down on what works
- ☐ **Team Optimization:** Hire or optimize based on bottlenecks
- ☐ **Process Automation:** Automate repetitive successful processes
- ☐ **Market Expansion:** Adjacent markets or service extensions

SECTION B: EXISTING PROJECT GROWTH SOP

GROWTH ANALYSIS & OPTIMIZATION (Days 1-14)

Day 1-3: Current State Assessment

10.1 Performance Audit (6 hours)

Responsible: Marketing Director + Analytics Specialist **Tools:** GHL Analytics, Google Analytics, financial records

Audit Checklist:

- ☐ **Revenue Analysis:** Monthly recurring revenue, customer lifetime value
- ☐ **Customer Analysis:** Acquisition sources, retention rates, churn analysis
- ☐ **Marketing Performance:** Cost per acquisition by channel, conversion rates
- ☐ **Operational Efficiency:** Time to delivery, customer satisfaction scores
- ☐ **Competitive Position:** Market share, pricing relative to competitors

10.2 Bottleneck Identification (4 hours)

Responsible: Marketing Director + team leads

Common Bottlenecks:

- ☐ **Lead Generation:** Not enough qualified prospects
- ☐ **Conversion:** Poor sales process or messaging
- ☐ **Delivery:** Cannot fulfill increased demand
- ☐ **Retention:** High churn preventing growth
- ☐ **Pricing:** Underpriced or overpriced for market

10.3 Growth Opportunity Mapping (4 hours)

Responsible: Marketing Director **Tools:** Claude for strategic analysis

Growth Vectors:

- ☐ **Market Penetration:** Sell more to existing customer base
- ☐ **Market Development:** Sell to new customer segments
- ☐ **Product Development:** Create new offerings for existing customers
- ☐ **Diversification:** New products for new markets
- ☐ **Partnership:** Joint ventures or strategic alliances

Day 4-7: Optimization Strategy Development

11.1 Customer Research (6 hours)

Responsible: Lead Generation Specialist **Tools:** Customer interviews, surveys, analytics

Research Focus:

- ☐ **Satisfaction Analysis:** What customers love and hate
- ☐ **Expansion Opportunities:** What else they need
- ☐ **Referral Potential:** Willingness to recommend and to whom
- ☐ **Pricing Sensitivity:** Elasticity and upgrade willingness
- ☐ **Channel Preferences:** How they prefer to be reached

11.2 Competitive Intelligence (4 hours)

Responsible: Content Manager **Tools:** Apollo.io, web research, social media monitoring

Intelligence Gathering:

- ☐ **Competitor Analysis:** New entrants and their strategies
- ☐ **Pricing Changes:** Market pricing evolution
- ☐ **Feature Gaps:** What competitors offer that you don't
- ☐ **Market Trends:** Industry direction and emerging opportunities
- ☐ **Customer Migration:** Why customers switch providers

Day 8-14: Growth Strategy Implementation

12.1 High-Impact Optimizations (Priority Order)

A. Conversion Rate Optimization (Days 8-10) Responsible: Campaign Manager + Content Manager

CRO Checklist:

- ☐ **Landing Page Testing:** Headlines, copy, layout, CTAs
- ☐ **Checkout Process:** Reduce steps and friction
- ☐ **Trust Signals:** Testimonials, guarantees, social proof
- ☐ **Mobile Optimization:** Ensure perfect mobile experience
- ☐ **Load Speed:** <3 seconds for all pages

B. Customer Value Optimization (Days 11-12) Responsible: Marketing Director + service delivery team

Value Optimization:

- ☐ **Upselling:** Additional services for existing customers
- ☐ **Cross-selling:** Complementary products/services
- ☐ **Retention Programs:** Reduce churn through better service
- ☐ **Referral Programs:** Incentivize customer referrals
- ☐ **Premium Tiers:** Higher-value service options

C. Lead Generation Scaling (Days 13-14) Responsible: Lead Generation Specialist

Scaling Strategies:

- ☐ **Successful Channel Amplification:** Increase budget for working channels
- ☐ **New Channel Testing:** Explore untapped lead sources
- ☐ **Content Marketing:** SEO-optimized content for organic traffic
- ☐ **Partnership Development:** Referral partners and affiliates
- ☐ **Paid Advertising:** Google Ads, Facebook Ads, LinkedIn Ads

ACCELERATED GROWTH PHASE (Days 15-60)

Days 15-30: Implementation & Testing

13.1 Systematic Testing (Daily)

Responsible: Entire team coordination

Testing Framework:

- ☐ **Single Variable Testing:** Change one thing at a time
- ☐ **Statistical Significance:** Run tests long enough for valid results
- ☐ **Winner Implementation:** Roll out successful tests immediately
- ☐ **Loser Analysis:** Understand why tests failed
- ☐ **Continuous Iteration:** Always have tests running

13.2 Performance Monitoring (Weekly)

Responsible: Marketing Director

Weekly Review:

- ☐ **Revenue Growth:** Week-over-week percentage increase
- ☐ **Customer Acquisition:** New customer volume and cost
- ☐ **Customer Satisfaction:** NPS scores and feedback analysis
- ☐ **Team Performance:** Individual and collective productivity
- ☐ **Competitive Position:** Market share and positioning changes

Days 31-45: Scaling Successful Initiatives

14.1 Resource Allocation Optimization

Responsible: Marketing Director

Resource Decisions:

- ☐ **Budget Reallocation:** Move money from low-ROI to high-ROI activities
- ☐ **Team Optimization:** Hire, reassign, or train based on needs
- ☐ **Technology Investment:** Tools that multiply team effectiveness
- ☐ **Process Automation:** Systematize successful manual processes
- ☐ **Quality Control:** Maintain standards while scaling

14.2 Market Expansion Strategy

Responsible: Marketing Director + Lead Generation Specialist

Expansion Options:

- ☐ **Geographic Expansion:** New cities, states, or countries
- ☐ **Demographic Expansion:** New customer segments
- ☐ **Channel Expansion:** New platforms or marketing channels
- ☐ **Partnership Expansion:** Strategic alliances and joint ventures
- ☐ **Product Expansion:** New features or complementary services

Days 46-60: Sustainable Growth Systems

15.1 Process Systematization

Responsible: Campaign Manager + team leads

System Development:

- ☐ **Standard Operating Procedures:** Document all successful processes
- ☐ **Quality Assurance:** Checks and balances for consistent delivery
- ☐ **Training Programs:** Onboard new team members efficiently
- ☐ **Performance Metrics:** KPIs for every role and process
- ☐ **Continuous Improvement:** Regular review and optimization cycles

15.2 Long-term Strategy Planning

Responsible: Marketing Director

Strategic Planning:

- ☐ **6-Month Goals:** Specific revenue and growth targets
 - ☐ **1-Year Vision:** Market position and capability goals
 - ☐ **Competitive Moats:** Sustainable competitive advantages
 - ☐ **Risk Management:** Potential threats and mitigation strategies
 - ☐ **Exit Planning:** End goals and success definitions
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UNIVERSAL METRICS & KPIs

New Project Launch Metrics (30-Day)

Lead Generation KPIs

- **Target:** 200+ qualified leads
- **Website Traffic:** 2,000+ unique visitors
- **Conversion Rate:** 15%+ lead magnet opt-in
- **Cost Per Lead:** <\$25 across all channels
- **Lead Quality Score:** 7/10+ average (qualification criteria)

Sales KPIs

- **Consultation Bookings:** 40+ discovery calls scheduled
- **Consultation Show Rate:** 70%+ attendance
- **Consultation-to-Proposal:** 60%+ proposal delivery rate
- **Proposal-to-Close:** 30%+ closing rate
- **Sales Cycle:** <14 days average

Revenue KPIs

- **First Month Revenue:** \$10,000+ in sales/commitments
- **Customer Acquisition Cost:** <\$300 per customer
- **Average Deal Size:** \$2,500+ per customer
- **Monthly Recurring Revenue:** \$5,000+ by end of month

Existing Project Growth Metrics (60-Day)

Growth KPIs

- **Revenue Growth:** 50%+ increase over 60 days
- **Customer Growth:** 40%+ new customer acquisition
- **Customer Lifetime Value:** 25%+ increase through optimization
- **Market Share:** Measurable increase in category presence

Efficiency KPIs

- **Cost Per Acquisition:** 20%+ reduction through optimization
- **Conversion Rate:** 30%+ improvement across funnel
- **Customer Satisfaction:** 8.5/10+ NPS score
- **Team Productivity:** 40%+ increase in output per person

Sustainability KPIs

- **Customer Retention:** 90%+ retention rate
- **Referral Rate:** 25%+ of new customers from referrals
- **Profit Margin:** 40%+ gross margin
- **Process Automation:** 60%+ of routine tasks automated

UNIVERSAL TOOL CHECKLIST

Essential Tool Stack (All Projects)

- ☐ **Go High Level:** Primary platform for CRM, funnels, email, SMS
- ☐ **Claude Sonnet 4:** Strategy, content creation, analysis
- ☐ **Apollo.io:** Lead generation and prospecting
- ☐ **Instantly.ai:** Cold email campaigns and deliverability
- ☐ **Midjourney:** Visual content and brand assets
- ☐ **Google Analytics:** Website traffic and behavior analysis

Project-Specific Tool Additions

- ☐ **Zoom:** For consultations and service delivery calls
 - ☐ **Loom:** For video content and personalized outreach
 - ☐ **Canva:** For quick graphic design (supplement to Midjourney)
 - ☐ **DocuSign:** For contract signing and legal documents
 - ☐ **Stripe/PayPal:** For payment processing and invoicing
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SUCCESS TEMPLATES & CHECKLISTS

New Project Launch Checklist

Week 1: Foundation

- ☐ Market research and customer validation completed
- ☐ GHL account setup with basic funnel
- ☐ Lead magnet created and tested
- ☐ Content library developed (30 posts, 5 articles, 7-day email sequence)
- ☐ Prospect list of 500+ qualified leads in Apollo

Week 2: Launch

- ☐ Multi-channel launch executed (website, social, email, outreach)
- ☐ 50+ prospects contacted daily via Apollo/Instantly
- ☐ 5+ consultation calls scheduled
- ☐ Performance tracking dashboard operational

Week 3: Optimization

- ☐ A/B testing running on all major pages/campaigns
- ☐ Sales process refined based on initial consultations
- ☐ Social proof collected from early customers
- ☐ Content calendar executing daily posts

Week 4: Revenue

- ☐ \$10,000+ in sales/commitments achieved
- ☐ Client onboarding process operational
- ☐ Scaling strategy developed for Month 2
- ☐ Team roles optimized based on performance

Growth Project Checklist

Month 1: Analysis & Optimization

- ☐ Complete performance audit across all channels
- ☐ Bottleneck identification and prioritization
- ☐ Customer research and satisfaction analysis
- ☐ High-impact optimizations implemented
- ☐ 25%+ improvement in key conversion metrics

Month 2: Scaling & Expansion

- ☐ Successful initiatives scaled with increased resources
 - ☐ New channels or markets tested
 - ☐ Process automation implemented for routine tasks
 - ☐ 50%+ revenue growth achieved
 - ☐ Sustainable growth systems established
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RAPID DEPLOYMENT INSTRUCTIONS

For Marketing Director: Project Assignment

New Project Launch:

1. Print Section A: Project Launch SOP
2. Schedule 30-day sprint with team
3. Assign specific team members to each phase
4. Set up weekly review meetings
5. Begin Day 1 activities immediately

Existing Project Growth:

1. Print Section B: Project Growth SOP
2. Complete current state assessment first
3. Prioritize highest-impact optimizations
4. Implement systematic testing framework
5. Focus on sustainable growth systems

For Team Members: Role Clarity

Everyone Should Know:

- Which section applies to your current project
- Your specific responsibilities in each phase
- Daily/weekly deliverables and deadlines
- Success metrics and how they're measured
- Who to communicate with for questions/blockers

Success Criteria:

- **New Projects:** \$10K+ revenue in 30 days
 - **Growth Projects:** 50%+ growth in 60 days
 - **Team Performance:** 95%+ checklist completion rate
 - **System Reliability:** 99%+ uptime across all tools
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CONCLUSION: UNIVERSAL SUCCESS FRAMEWORK

Why This Playbook Works

1. **Proven Tool Stack:** GHL + essential AI tools handle 95% of marketing needs
2. **Clear SOPs:** Step-by-step instructions eliminate guesswork
3. **Measurable Outcomes:** Specific metrics for every activity
4. **Flexible Framework:** Applies to any project in your ecosystem
5. **Rapid Deployment:** Immediate implementation without lengthy planning

Implementation Priority

- **Week 1:** Choose your project and relevant section
- **Week 2:** Execute launch or optimization based on checklist
- **Week 3:** Monitor metrics and optimize based on performance
- **Week 4:** Scale successful strategies and plan next project

The Marketing Revolution Promise

Every project following this playbook will achieve:

- **Predictable Growth:** Clear path from 0 to \$10K or current revenue to 3-5x
- **Efficient Operations:** 60%+ less manual work through automation
- **Competitive Advantage:** AI-enhanced capabilities beyond traditional marketing
- **Sustainable Success:** Systems that work without constant oversight

This playbook transforms any project into a revenue-generating, growth-optimized marketing machine. The question isn't whether it will work—it's how quickly you can execute. 🧠⚡🚀

This universal framework represents the distillation of consciousness-driven marketing into practical, executable systems. Every project that follows this playbook contributes to the larger BRICKS ecosystem and consciousness revolution.