

# Organizational Checklist for VAs

## What Is Needed BEFORE Starting

### The Strategy Basics

- **What Is The List Sign Up Process?**
  - Person exchanges email address for "something of value"
    - typically free
    - ebook
    - video
    - webinar
    - audio

Before "something of value" can be delivered, person must be told to "confirm" or verify they requested it

Person checks emails and clicks confirmation link

- Person has now also implicitly agreed to receive future email messages

Confirmation Link is set to a URL that delivers "something of value"

An immediate follow up message is also triggered with additional information; maybe more details about the "something of value"

In the case of my client's site, we wanted people to sign up BEFORE seeing the Special OTO page

- **What is the Buy Process?**
  - OTO (One-Time Offer) Page
    - Clicks Buy or Add to Cart button
  - Presented with Payment Processor
    - PayPal
    - Credit Cards
  - After payment processes, customer should be redirected to where the paid for content is located
    - URL to login to a membership site
    - URL to Thank You page
    - URL to an OTO/Upsell/Downsell page

Customer receives payment receipt from PayPal

Receives another confirmation email from Aweber for that particular purchase

Person checks emails and clicks confirmation link

- Person has now also implicitly agreed to receive future email messages

Confirmation Link is set to a URL that delivers paid content

- URL to login to a membership site
- URL to Thank You page

An immediate follow up message is also triggered with additional information; maybe more details about the paid content

- **What will be the flow of the IB 2.0 pages?**
  - Opt-in or Squeeze Page
  - Confirmation Page
  - Sales or OTO Page
  - Thank You Page
  - Content Delivery/Download Pages
    - Inside a Membership area
    - Otherwise protected somehow

## From the Client for the VA

- **Login Details**
  - Instabuilder 2.0 Login
    - only if you already own it and it needs to be installed
    - Username/Login/Email \_\_\_\_\_
    - Password \_\_\_\_\_
  - WordPress Admin Login
    - Username/Login/Email \_\_\_\_\_
    - Password \_\_\_\_\_
  - FTP or cPanel Login
    - Username/Login/Email \_\_\_\_\_
    - Password \_\_\_\_\_
  - Aweber (or other Autoresponder) Login
    - Username/Login/Email \_\_\_\_\_
    - Password \_\_\_\_\_
  - PayPal
    - Username/Login/Email \_\_\_\_\_
    - Password \_\_\_\_\_
  - Digital Access Pass (DAP)
    - Username/Login/Email \_\_\_\_\_
    - Password \_\_\_\_\_

- WishList (WL)
  - Username/Login/Email \_\_\_\_\_
  - Password \_\_\_\_\_
- Miscellaneous
- **Content for each**
  - Permalink - what is going after yoursite.com/XXXXXXX
  - Page Settings-Name of page that shows in browser
  - SEO - keywords, meta tags
  - Headline/subheads for each page
  - Hex codes for any custom or specific colors for each page
  - ONE Location for ANY/ALL Graphics/Images (for instance, a shared dropbox)
  - Price(s) for every product
  - PayPal/DAP/WishList URLs for adding to payment buttons in IB 2.0
- **Autoresponder Content ready to go**
  - List Name & Description
  - Confirmation Subject Line
    - Confirmation Text before Aweber's confirmation link
  - URL of where you want people to go when they click the confirmation link
    - That URL goes at the bottom of Step 3 in Aweber in the Confirmation Success Page field (also known as a thank you page area)
  - For the FORM that people will be completing
    - First Name AND EMAIL
    - EMAIL ONLY
  - Name of Form
    - Change Confirmation Page to Custom URL
    - This will be your Confirmation Page from IB 2.0 that you create
  - Follow up Message (Immediate)
    - Any Broadcast Messages
    - And Follow up Messages
    - Dates/Times if Any messages are to be scheduled

- **Paid Product Content**

- If it already exists, where?
  - List specific filename paths
  - URLs
  - PDF
  - Audios
  - Videos
- If it needs to be created, what does that look like?
  - A written description is ideal
  - Certainly a conversation needs to happen for the details
- Where are the Images?
  - List specific filename paths
- For How Much?
  - What's the regular price
  - Is there a discounted price?
  - Is there a coupon code?
- WHERE will the content live?
  - Membership Area
  - Separate IB 2.0 pages linked together?
  - I believe this would work in lieu of a membership site if you don't have one
  - I believe you can password protect pages in WP, but then again, it may not work for iB 2.0 pages -- need to check

- **Deadline for completion**

- Client Needs By When
  - Absolute Hard Deadline - Pages Live
  - Preferred Deadline to allow for changes
  - This experience of mine has proven that it can be completed in a week, but ONLY if the VA's schedule permits