



# Customer Success Roadmap

# Welcome to the Success Roadmap!

This roadmap is brought to you by Kajabi's Customer Success team as a way for us to share the tips, tools, and resources that we've learned are most important for launching your business on Kajabi! This document is separated into 5 sections—you can follow in order or skip around to sections that are most relevant to you. We're so excited you're here and can't wait to see the impact your business will make!

## Success Roadmap

- [Before You Get Started](#)
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# Before You Get Started

# Introduction

The Customer Success team's goal is to save you time and effort while setting you up for success on the platform. Before we take you down the road to launching a successful business on Kajabi, there are a couple of key decisions we recommend making to ensure you create a strong foundation for your business.

## Before You Get Started

- [Branding](#)
- [Audience](#)
- [Messaging](#)

# Branding



## Who and what is your business?

First, it's time to brand your business. An easy way to think of this is defining what your company's identity is. Whatever it is, you'll need to decide what colors, fonts, visuals and voice will go along with it—this is what we like to call **branding**. By developing your company's brand before doing anything else, you'll ensure your business looks professional and cohesive right off the bat, and be able to create better brand awareness for new and existing customers!

## Success Tip

Create a simple style guide for your business that will help remind yourself of your brand standards. We recommend using [a template from FlipSnack](#) to get started.

# Audience



## Who are you trying to reach?

Speaking of customers, who are they exactly? Before you can acquire paying customers, you need to know exactly who is willing to pay you. So ask yourself this...

- Who is your ideal customer? We recommend you be as specific as age, location, gender, interests, job title, etc. Being more specific will help you target and craft the right messaging.
- Do you have multiple types of customers? If so, this is 100% normal, just be sure to define each audience/avatar!

Finding your target audience can be tricky, so [how exactly do we find our niche?](#) We've compiled a list of questions you may ask yourself when defining who your target audience really is.

1. Is your ideal customer a business or a consumer?
2. What is the age, location, and gender of your ideal customer?
3. What platform are they likely on? Eg. LinkedIn, Instagram, Facebook, Pinterest, YouTube, etc.
4. What does their family life look like? Are they single, married, or parents?
5. What are their interests and hobbies?
6. What are their pain points, frustrations, and struggles?
7. What brings them joy and happiness?
8. When you put yourself in the customer's shoes, what are the top 3 things that you'd want to gain from taking your course or service?

## Success Tip

Create your customer avatar to help define your ideal customer and their most common pain points. We recommend using [this template from DigitalMarketer](#) to get started.

# Messaging



## Value proposition

This section is simple but perhaps the most important part of defining your business. You'll want to create one sentence that describes **how your audience will benefit and what they will gain** by purchasing your offering. All of your copy and marketing content should be informed by this statement.

## Success Tip

Use [this post from WordStream](#) to see examples of strong value proposition statements!

# Checklist

- ☐ Create your style guide
- ☐ Define your ideal customer avatar
- ☐ Define your value proposition



# Step 1: Get People

# Introduction

When starting an online business, it's easy to feel overwhelmed with the question "Where do I start?" With so many moving pieces, it can be beneficial to take them on one at a time. Every business, whether online or offline, needs leads. A **lead** is someone who is aware, interested, and could benefit from your products or services. A great way to gather high quality leads is by creating a **lead generator**. A lead generator is exactly what it sounds like: value you offer to take a non-customer and foster the first level of engagement with your business.

In this step, we'll show you the fundamentals of creating an effective and scalable lead generator to help your business grow. Through utilizing your strengths, delivering sensibly, and making a scalable resource, you can develop the perfect net for prospective customers.

It's easy to look to the "industry standard" as a monolith: "Every financial coach gives a free report as a lead generator, so I must!" Although it can be helpful to follow a proven model, that copycat thinking removes a crucial piece of the equation... your audience! A PDF isn't valuable simply because it exists—a webinar isn't inherently helpful because it's live. The things you create have value because they aim to solve a problem or help your target market reach their own goals. Ultimately, you're aiming to provide a small, quick solution to your potential customers in a way that entices them to come back for more!

## Choosing Your Lead Generator

- What are your strengths?
- Would your audience want this?
- Can it scale?

# Utilize Your Strengths

## What are your strengths?

Start with what you're good at.

In the list below, circle anything that you would consider to be a strength of yours. This exercise will help you begin conceptualizing how to format and deliver the value of your lead generator.

**Course building**

**Audio/video production**

**Design**

**Consultation**

**Presentation**

**Quiz building**

**People skills**

**Success story**



What did you circle above? Are you a charismatic presenter that's quick on their feet? Then perhaps doing a live webinar would have the most impact. Maybe you're an educator who specializes in building curriculums. A free, bite-sized version of your course might be all it takes to pique someone's interest. Those with a background in design might be able to easily whip up a gorgeous PDF or downloadable checklist. When choosing a lead generator, start with a strength and go from there. It'll be less stressful, and likely yield better results!

## Deliver Sensibly

Now that we've started with your own strengths, it's time to think outwardly. Who are you trying to reach, and how can you best reach them? Beyond connecting with people through the content itself, you can maximize your audience engagement by delivering it in a way that is optimal for them. Ask yourself: "Would my audience want this?" Below are some questions to consider when strategizing ideas for a lead generator!

How much margin does your potential customer have in their day? Imagine your audience is made up of busy professionals. It's not as likely that they will have the time or desire to prioritize a one-hour live webinar. A quick, downloadable report that they can read at their own convenience is a better fit.

### If you want a good freebie, you've got to make it easy.

The idea of a lead generator is built on the assumption that this audience doesn't know you yet. If the journey to value is difficult, they are as good as gone.

How does your audience consume media? Are they the type to read an article about current events, or do they hop on YouTube? Tailoring your lead generation strategy to the personalities and preferences of your audience will help you reach your marketing goals. Additionally, consider the link between the freebie and the offer you are selling. Having a free consultation call for a coaching program that includes 1:1 sessions makes sense; there's a connection between what you are offering for free and what they'll be paying you for. It is possible to have a lead generator that builds your list but does not produce customers.

#### Think Like Your Audience

What's something simple that your audience could gain value from quickly?

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## Make It Scalable



### Success Tip

As your list grows, there are several ways to calculate the value of your email list and effectiveness of your email campaigns. [Click here for a few simple formulas](#) to add to your toolkit.

Everything comes with a cost—even if it doesn't have a price. Any action you take requires some measure of sacrifice from your greatest resource... time. When picking a lead generator, always think about how much time and effort that it takes to deliver. You want to develop freebies that still allow you the time you need to work on your paid offerings.

Ideally, your sales flow looks something like a funnel. [Click here to learn](#) how to create a sales funnel using Kajabi Pipelines. The freebie's job in the pipeline is to cast the net to help pull new people into the funnel—it's a conduit to an eventual sale. Your freebie is not meant to be a small butterfly net, it's meant to be a deep sea fishing net.

Let's say you decide to give away free consultation calls to anybody who opts-in to your email list. That may be a great opportunity to drive sales over the phone. Especially if you're a great communicator. But what happens when your popularity grows? Now your schedule is packed with free calls given to people who may not ever pay you a dime. In this flow, you are always standing between an ocean of customers and each individual sale. This makes you a bottleneck. You are preventing your ability to maximize the effect of your lead generator—and ultimately—your sales.

When will you have time to work on that new module, create that new course, let alone find time to relax? For you, maybe it's time to charge for the call, and time to think about a new lead generator. One that can scale.

When you're creating your freebie, think **funnels** over **bottlenecks**.

## Let's Recap



Creating content for lead generation can feel overwhelming. But you got this! By utilizing your strengths, and staying within your comfort zone, this necessary step in your journey to success online will become more manageable. If the idea of going live makes you sweat, choose a different way to generate leads, if it excites you then drive forward full steam ahead!

Additionally, your marketing endeavors will be effective if you continue to have your audience in mind. What is doable for the person you are trying to reach? How much time do they have? What kind of content, or medium, do they enjoy consuming? Getting inside the mind of your future customers will help your opt-in conversions.

However easy the gurus might make it sound, creating valuable content and building an email list is hard work. Expect ahead of time to produce consistent value to your audience before seeing a return.

### Did You Know?

On average, a Kajabi list has 464 emails before the first sale!

# Checklist

- ☐ Choose your lead generator
  - Download (checklist, guide, report)
  - Webinar (live, evergreen)
  - Value Videos (sales page video, pre-recorded series)
  - Tripwire Offer (splinter your product, mini course, paid webinar)
  - Other: \_\_\_\_\_
- ☐ Is this valuable to the same audience as your paid offers?

# Step 2: Create Your Product And Offering



# Introduction

Your **product** will serve as the vehicle in which you deliver your content, and your **offer** serves as the payment gateway and checkout page for anything you wish to sell on Kajabi. Have you thought about if you will be selling a course, membership site, coaching program, community space, or something else? And what will you charge for your products? In this section of the Success Roadmap, you'll learn how to leverage products and offers to maximize your value and to provide a world-class experience for your customers. Let's get started!

## Create Your Product And Offering

- Developing your product
- Structuring your product content
- Impersonate the customer
- Focus on high-quality content
- Pricing your product
- Leveraging payment options
- Leveraging the pricing tier model
- Automate, integrate, and iterate your products and offers

# Developing Your Product

Once you've established what type of product you'd like to offer, you can use Kajabi's **Product Blueprints** to begin building out your product!

Kajabi's Product Blueprints are simply starting points to guide you, so keep in mind that all Products can be completely customized to fit your own needs. If the content you're delivering is quick and easy to digest, then it may be best suited for a Mini Course that can eventually transition into a longer, flagship course. If you have a large amount of content, you may consider dripping out modules over a series of days or weeks as an Evergreen Course. Or if you feel your offering is somewhere in between, you can upload all of your modules at once as an Online Course. The Membership product is a good choice if you are building out a membership site where you are planning to add new content on a daily, weekly, or monthly basis.



## Did You Know?

You don't have to use a Product Blueprint in order to sell something within Kajabi. You can actually sell a coaching call, live training, service or even physical product by creating what we call a **Ghost Offer!**

# Structuring Your Product Content



## Success Tip

Keep in mind that you do not have to have your product completely finished before launching! While it's good to give them at least some content to access right away, you can periodically add material as they continue to progress...and when you have the time!

It's important to keep in mind that there's no "right" way to structure your product. The key to determining how to present your material is to imagine yourself in your customers shoes. Try to envision how they would want to see your content so that it's easy and fun for them to progress through. More posts with shorter videos tends to be easier to digest than fewer posts with longer videos. Be sure to always **preview your product** as if you were a customer so you can see exactly what they will see.

# Impersonate The Customer

Put yourself in your customers shoes, one of the best practices you can adopt for your business is to "impersonate" a fake customer in Kajabi. This will allow you to truly understand their experience in your platform from the moment they first land on your site, to when they purchase your offer, and then engage with your product.

## Focus On High-Quality Content

Quality over quantity! The quality of your video and audio content can be a make or break factor for your customer experience and whether they decide to engage or even buy from you in the future. But this doesn't mean that you have to use expensive gear! In fact, while video quality is important, we've found that your members will most likely place a higher value on having good quality audio in their experience, rather than video quality.

**[Click here](#) to check out Kajabi's blog post on how you can leverage equipment you already have at home to record pro-quality audio and video!**

### Checklist

- Define what your product will be (Membership, Course, etc.)
- Create essential high-quality content for your Product (videos, downloads, etc.)
- Determine how you want to release your content
- Explore the customer experience of your product



## Pricing Your Product

One of the most difficult decisions to make when launching an online business is determining how to price your offering. It's tricky and can sometimes feel awkward putting a price tag on something, especially if this is the first time branching out on your own! We hear you and want to help! We've put together a few questions to ask yourself when sitting down to price your product below:

- How much time, money, and resources did it take for you to create your offering?
- What would you charge a customer if you were delivering this material to them in a one-on-one session?
- How valuable do you feel your online offering is in comparison to a one-on-one session? More valuable? Less valuable? Are there other add-on offerings?
- What are others in your field charging for similar offerings? How much value are they providing for that price?

**Example:** You usually charge \$1k for 8 weeks of in-person coaching sessions, you have now decided to convert these sessions into an online course, do you think the online version is as valuable? Is it less valuable? More valuable? Let's say it was 75% as valuable because they will not receive the in-person sessions which you believe are important for your practice, then perhaps consider charging \$750.

**Check out Kajabi's blog about pricing!**

# Leveraging Payment Options

A way to increase sales and reduce barriers to entry for your customers is by providing them with multiple options for how they'd like to pay. For example, try giving your customers the option to choose between a "one time payment" or a "multiple payment plan". [Click here](#) to learn more about creating multiple offers in Kajabi!



## Success Tip

Consider creating offer bundles that allow customers to purchase multiple products at a time for a discounted price! More bang for their buck!

# Leveraging The Pricing Tier Model

When developing your pricing structure, consider offering different pricing tiers. As someone moves up in plans, they'll receive more features/ add-ons! You'll be able to maximize the customer value over time by helping them build trust with your brand and giving them the option to upgrade to a higher tier in the future. This is a common best practice in successful online offerings.

For example, you can offer a 3-tier system (bronze, silver, and gold) by creating 3 individual offers for each tier and then attaching each offer to the respective product that goes with that tier. This will allow you to give access to content that corresponds only to the tier your member selected.

## Checklist

- Create a pricing structure for your product
- Consider if there are ways that you can bundle your different offerings
- Customize your checkout pages
- Determine what you'd like to happen after purchase



## Success Tip

Many Kajabi users have found that pairing a Community Product with a Membership Product to have a dedicated space for conversation around the subject matter can be incredibly effective as a value add to your customers.



## Did You Know?

The average \$1k Kajabi Hero has 6 products they offer!

# Automate, Integrate, and Iterate Your Products and Offers



## Success Tip

If you'd like to congratulate your customer on completing the course with a certification of completion, we recommend integrating with Accredible! You'll need to use a helpful "middle-man" software like Zapier to facilitate these 3rd party connections. [Click here](#) to learn more about using Zapier.

## Product Automations

In Kajabi, you can create automations within a product at the post level to take care of processes that you would normally have to execute manually. While there are so many possibilities for the different kinds of automations available, you'll want to approach this tool with a particular use case in mind. Maybe you'll want to send them an automatic email congratulating them on their progress or tag them as a particular kind of customer. Whatever automations you implement, you'll want to keep the **desired outcomes** at the forefront. [Click here](#) to learn more about implementing automations at the product level.

## Offer Automations

Automations at the offer level will allow you to have processes seamlessly operating in the background once a qualifying rule is met. This means that you can trigger a variety of different automations based on certain transactional activity with your customer. One helpful example of this could be when your customer purchases a low-tier offer from you, you can then automatically subscribe them to an email sequence you've created that encourages them to upgrade to the next level. Offers can also be integrated with several external applications to work with your external email lists and other tools for your business outside of Kajabi.



## Iterate and Scale

You can use two key resources surrounding your products and offers to help you gain insights and leverage them to iterate and deliver more value to your customers over time. One of the first key resources you should be paying attention to is the actual **voice of your customer**. Be eager to ask them for feedback and consider creating a process to collect that feedback following any deliverable you've sold to them. The 2nd key resource to leverage is your **Analytics** hub in Kajabi. This powerful data will allow you to find out what offers are more effective as well as how engaged your members are inside your products. By making a habit of leveraging these insights, you'll be able to understand what's resonating with your customers, make improvements where needed, and ultimately scale your business to new heights.



### Did You Know?

The average number of Members in a Kajabi 1k Hero site is 467!

### Checklist

- ☐ Have you noted down any desired automations in your products or offers?
- ☐ Have you considered any outside apps you want to integrate with?
- ☐ Have you considered developing a routine for you to check on the progress of your members in your products?
- ☐ Have you acquainted yourself with the analytical data available to you?



# Step 3: Build Your Website

# Introduction

A key component to any online business is a clear and effective website. When you look into the most successful sites, there are three questions that every great landing page can answer:

- What value do you offer?
- What is your business about?
- Can visitors tell where to go next?

In this section, we strive to answer these questions with a simple mantra: **“Be relevant, be clear, be compelling.”** Your website should serve as a place where potential customers can learn more about you and/or the business, discover the information and services you offer, any additional insights through blog posts or podcasts, and more! You’ll want to be sure to have a clear connection throughout the pages and a message that connects with potential future customers.

## Build Your Website

- Be relevant
- Be clear
- Be compelling

**Here are a few things you will want to have filled out before moving on in this guide:**

- Site info
- Branding (Logo & Favicon)
- Color Palette
- SEO
- **Custom Domain** (if you plan to connect one, but you can always do this later)
- **Create Standalone Page** in the Pages Tab



## Be Relevant

The first thing that a customer should see when they visit your page is your **value proposition**. What is it that you are offering to your target market? Visitors and potential customers have come to your site because they are looking for a solution. They should know if they've come to the right place to find an answer. One could argue that the value proposition should be even larger and bolder than the name of your business. If you go to Apple's website, they don't bother introducing themselves, they get right to offering a solution—maybe the one you're looking for. Think of a time where you've been driving around in an unfamiliar area and you're craving something like pizza or Thai food. You don't need to know the entire history or even the name of the place in that situation. You just need to know one thing—"That sign says pizza. I bet they have pizza." Or "Thai food! Let's try it." Not many things hold quite the value of pizza or Thai food, so you may need a full sentence for your value proposition. But ultimately, you want the outside world to know what they're getting if they come inside.

### Checklist

- You have a value proposition (ex: Slack—be more productive at work with less effort)
- The value proposition is immediately noticeable
- Your messaging is consistent and serves the purpose of your value proposition



### Success Tip

Make sure you communicate your value clearly, whether through the headlines of your sections, testimonials, expected results etc.

Try and meet your visitors where they are at and focus in on the problem they want solved. They are in search of a solution and you want to make sure to answer their questions and show how you will be able to help!

If you find you are better in front of a camera than trying to express your value through text blocks on your page, then maybe consider adding in a sales video to discuss your offering.

[Click here](#) for examples of value proposition Statements from Wordstream!

## Be Clear



Confusion is the enemy of curiosity. Confusion leads to frustrated visitors and poor conversions. Going back to the pizza analogy—imagine walking up to the store front to look at the menu and you have to sift through a huge menu only to find pizza on the last page... or worse, there's a separate menu for the pizza options entirely. There's no need to be subtle with your potential customers. As they scroll through your site, you want to give them something to accept or reject right off the bat.

**Branding:** Apply the same colors, logos, styles etc. across your site to give a consistent feel throughout visitors' entire journeys. We want them to know they're on your website at a glance and providing a consistent experience can both boost confidence in your offerings while also supporting the overall layout of your site.

**Layout:** What messaging or services do you want visitors to see right away? Giving them an obvious path (ie. watching a video or clicking a call to action) makes finding their solution much more immediate. You want to put your best foot forward right from the start and make it as easy as possible for visitors to find a solution to their problem.

### Success Tip

Stay away from language like "Learn more" or "Get Started." Instead, use phrases like, "Subscribe today", "Book now", or "Buy now". Be deliberate and obvious.

These ideas also apply to the design of your pages. Consistent layout and branding coupled with a clear path to a solution should be apparent across your entire site; whether visitors are on a standalone opt-in page or the About Me page. If a potential customer is confused by your site, they will likely go somewhere else.

[Click here](#) for a short video series on how to give your site a Marketing Makeover!

### Checklist

- ☐ Are your pages "action-centric" rather than "feature-centric"?
- ☐ Is your business name or logo in the header?
- ☐ Do all of your pages have a favicon?



# Be Compelling

Demonstrating clarity and consistency can help you create a compelling call to action, though clarity doesn't always equal compelling results. I can clearly communicate an exhausting process, and it doesn't make it any more attractive. So always remember: make it easy.

## Lewinian Recipe

Have you heard of the phenomenon called the Lewinian Recipe? It states that, by nature, people are far more likely to do what is easiest for them than to do what they actually want to do. A great example of this is with the differences in Organ Donors across the globe. In the U.S., organ donation is an Opt-In process. When polled, around 80% of U.S. citizens say that they believe organ donation is a good thing and that they would do so to help another person. Though, less than half of the population are actually organ donors. For most of the EU and UK, organ donation is an Opt-Out process. The polls regarding the sentiment of organ donation are the same in those countries, though the organ donors are in the 90% range. The actions of people more accurately reflect the polls. Make the desired result the easiest action and it'll reflect in your opt-ins. Sometimes being simple is enough.

### Checklist

- Include an opt-in form on your page so that you can collect the name and email of the user
- Add a call to action button within the first scroll of the page and be sure it is clear where this button will take the user!
- Check your pages to ensure that everything is connected properly and there are no dead links
- Review your site to make sure it takes no more than 10 seconds for a user to know the name of your business, the value they'll receive, and where to click to purchase your offering
- Create a clear path so that there is minimal thinking involved of what someone should do next. (ex: The path for a strategy call sign up  
1) Click the "sign up button/fill out the form 2) Schedule the call 3) Pay for the future sessions after you have had the call)



## Let's Recap

Now, let's review everything that has been discussed in this guide so far and see where you are at. Remember the three questions we asked in the introduction? Well, it's time to write out your answers if you haven't already. Remember to keep our mantra in mind when answering these questions: be relevant, be clear, be compelling.

Moving forward, as you continue to build out additional pieces of your website, you can use what you have now to clone and use as templates for the rest of your pages. Then, your branding will stay intact and you don't have to adjust fonts and colors on every new page.

You will also be able to utilize the analytics tab for information about page views, opt-in rates and conversions. To learn more about this data, you can check out [this help article](#).

### Be Relevant, Be Clear, Be Compelling

What value do you offer?

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What is your business about?

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Can visitors tell where to go next?

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# Step 4: Market Your Product



# Introduction

Marketing your online business or course is an exciting, and crucial part of your business model. Without it, how will you get your product or course into the hands of the people who need it the most? But what many of us tend to not realize, is that marketing is much more than what's inside the Kajabi marketing tab. Marketing starts with defining what we want our company's identity to be, which will then define what our marketing efforts should look like.

Before you get started with marketing your product or service, we recommend checking out the **branding** section within the "Before You Get Started" step in the roadmap. It's important to create consistency throughout your online marketing efforts, as well as develop brand awareness with your customers.

**Helpful Resources:** [What falls under the marketing umbrella?](#)

## Checklist

- ☐ Define what your company's identity is
- ☐ Complete your style guide



## Market Your Product

- [Audience and messaging](#)
- [Methods of outreach](#)
- [Creating lifetime customers and maximizing customer lifetime value](#)
- [Optimizing and measuring success](#)



## Success Tip

Create a simple style guide for your business that will help remind yourself of your brand standards. We recommend using [a template from FlipSnack](#) to get started

# Audience and Messaging



## Success Tip

When it comes to marketing, don't trust your gut. Beta-test your marketing campaign on a friend, colleague or relative who fits your ideal customer mold!

Speaking of customers, who are they exactly? In order to create an effective marketing strategy and campaign, you need to know exactly who your target audience is. So be sure to check out how to define your target audience in the "Before You Get Started" step.

Once you've defined your audience, it's time to put your research to the test! Try creating an email or pipeline opt-page inviting your audience to check out your course or offering. Take into consideration your audience's pain points, and communicate to them exactly how your course or membership will help solve their immediate problem!

## Checklist

- Identify your niche market
- Create an Email, Pipeline or Sales Page promoting your course/membership
- Beta test your messaging on someone who is apart of your target audience



## Methods Of Outreach

There are so many ways to promote your business/product outside of Kajabi, such as social media pages/groups, paid advertising, affiliate marketing and more. When deciding what marketing efforts you should focus on, keep in mind your target audience and what platform you'll have a higher chance in reaching them. (Ex. If your ideal customer is a college graduate, chances are Instagram and LinkedIn is a great place to be promoting your course/site.)

If you have an existing list, we recommend you start with an Email Sequence or Broadcast that is targeted to specific segments within the list to re-engage them. If you are starting fresh, we recommend you start with a Sales Page OVO or Product Launch Pipeline to start building your email list and introducing your brand to prospective customers!

### Marketing To New Customers

When marketing to new customers, we recommend using the [Sales Page OVO](#) or [Product Launch OVO Pipeline](#)—both of which will consist of an opt-in, email sequence, and offer presentation. It's important to always have the end goal in mind when creating a pipeline or any email sequence as it will help develop your messaging and convince the person why they **need** your product/offer. Be sure to clearly outline the benefits of your product/offer, using testimonials, videos, success stories, and applicable examples as supporting information. It may be beneficial to present an exclusive offer to these groups that you are marketing to that may provide increased value and/or urgency.

If you do not have anything to offer just yet, we recommend you thank them for joining and be sure to send a newsletter (email broadcast) in the future to keep them engaged and familiarize them with your brand and content. When you are ready to begin selling, you can always send these early subscribers more information.

### Marketing To Existing Customers

If you have an existing audience, or list that you have acquired over the past, it is important that you re-engage these customers and give them the option to "opt-in" to receive more information about your future offerings, or to "opt-out" in case they are not interested. Luckily, Kajabi automatically provides the

'unsubscribe' option in all of your marketing emails so that your contacts can choose to opt-out at any time. We recommend sending these contacts an email broadcast with a call to action, whoever does not open or click on the email, should be removed from your list. This will ensure that you are emailing customers who are interested in what you are provided. Learn more about email list hygiene [here!](#)

Another way that we recommend to expand your audience using your existing customers would be to implement an [Affiliate Program](#). This allows you to expand your reach using the incentive of commission to those who would like to promote your courses/offers.



### Success Tip

Exhaust your free marketing sources for leads and sales before getting into paid advertising. Some free resources may include an existing list of contacts or social media.

**Helpful Resources:** [Kajabi's Ultimate Guide To Paid Advertising](#), [Pipelines Overview](#)

### Checklist

- Determine what platform your ideal customer is using.
- Be sure to always have a clear goal in mind when creating the content for these emails, pages, and automations.
- Create a pipeline to engage new customers
- If you have existing customers, be sure to send them a re-engagement email broadcast and/or sequence.
- Remove any inactive subscribers from your list to improve email deliverability



# Creating Lifetime Customers and Maximizing Customer Lifetime Value

So you've launched your paid offer and made your first sales! Congratulations! Now is the time to create lifetime customers who love your business and will buy from you over and over. A great place to start is to offer early bird or founder pricing for your original group of customers. This creates a feeling of exclusivity for your founding members, as well as provides a great opportunity to get feedback for when you are ready to bump up your pricing!

You'll also want to be sure that existing customers are some of the first to know about your new offerings. You can do things like create exclusive discounts for existing members as well as offer upsells and cross-sells. Kajabi allows you to offer **upsells right on your checkout page** as well as **cross-sells in a product**. You can also use automations to **generate coupon codes** for your other offers that will be emailed to users of an existing product. Lastly, you can keep your customers interested and engaged by hosting contests and giveaways. You can also consider adding gamification to your course by automatically **sending certificates** or badges to members as they progress through the material.



## Success Tip

Have you thought about adding a Community? Adding a Community to your course or membership is another great way to keep current members engaged, and feeling like they are receiving constant value!

## Checklist

- Determine ways that you can surprise your members with value
- Offer existing customers exclusive pricing or discounts for other courses that you sell



# Optimizing and Measuring Success

So, you've created your style guide, developed an award-winning pipeline, and scheduled out a nurturing email sequence... how do you know if it's working or not? Measuring your results is key to learning what works best for your audience, and what doesn't. Keep in mind that all industries are slightly different, and the following statistics are **not** the only way you should be measuring your success.

## Email Statistics To Aim For

**>1% Bounce Rate:** Bounce rates should be below 1% over the course of several email campaigns, because a bounce is an indication that the email address does not exist. Fortunately, Kajabi automatically unsubscribes email addresses that bounce, so bounce rates should trend downward as long as you're only subscribing valid email addresses with the consent of the recipient.

**~20% Open Rate and <3% Click Rate:** Customer engagement can vary based on so many factors—when the email is sent (time, day of week, date), the content of the email, the wording of the call-to-action, if they're in the mood to open an email...the list is almost endless. A "good" engagement rate is highly personal, so pay attention to your engagement rate on Kajabi over time and understand what's good for you and what could be improved. If you're new to the email marketing game, a guideline is ~20% for opens and <3% for clicks.

Average number of emails sent is not important—successful people range from 10 emails per day to 2.5 million per day. There's no magic number. What is important is sending relevant, engaging content to consenting recipients.



## Success Tip

We recommend trying [split testing](#) in order to see what type of messaging works best for your audience. This will allow you to focus more time and resources on well-performing pipelines.

From an email deliverability standpoint, the important thing is consistency. If you're going to send 35k emails a week, send 5k per day so that recipient email servers are used to your traffic.

Learn more about [email metrics](#) and [email best practices](#) here!

## Checklist

- Check your numbers to see how you fall in comparison
- Keep your list clean by deleting inactive users who are not opening emails
- Edit existing campaigns appropriately (ex. If a pipeline is performing poorly, reassess and try switching up imagery)



# Customer Success Master Checklist

## Brand Your Business

- ☐ Create your style guide
- ☐ Define your ideal customer avatar
- ☐ Define your value proposition

## Get People

- ☐ Choose your lead generator
  - ☐ Download (checklist, guide, report)
  - ☐ Webinar (live, evergreen)
  - ☐ Value Videos (sales page video, pre-recorded series)
  - ☐ Tripwire Offer (splinter your product, mini course, paid webinar)
  - ☐ Other: \_\_\_\_\_
- ☐ Is this valuable to the same audience as your paid offers?

## Create Your Product

- ☐ Build your product
  - ☐ Define what your product will be (Membership, Course, etc.)
  - ☐ Create essential high-quality content for your product (videos, downloads, etc.)
  - ☐ Determine how you want to release your content
  - ☐ Explore the customer experience of your product
- ☐ Price your product
  - ☐ Create a pricing structure for your product
  - ☐ Consider if there are ways that you can bundle your different offerings
  - ☐ Customize your checkout pages
  - ☐ Determine what you'd like to happen after purchase

☐ Automate your offer

- ☐ Have you noted down any desired automations in your products or offers?
- ☐ Have you considered any outside apps you want to integrate with?
- ☐ Have you considered developing a routine for you to check on the progress of your members in your products?
- ☐ Have you acquainted yourself with the analytical data available to you?

**Build Your Website**☐ Value proposition

- ☐ Define your value proposition (ex: Slack—be more productive at work with less effort)
- ☐ Is your value proposition immediately noticeable?
- ☐ Is your messaging consistent and serve the purpose of your value proposition?

☐ Page building

- ☐ Are your pages “action-centric” rather than “feature-centric”?
- ☐ Is your business name or logo in the header?
- ☐ Do all of your pages have a favicon?
- ☐ Include an opt-in form on your page so that you can collect the name and email of the user
- ☐ Add a call to action button within the first scroll of the page and be sure it is clear where this button will take the user!
- ☐ Check your pages to ensure that everything is connected properly and there are no dead links
- ☐ Review your site to make sure it takes no more than 10 seconds for a user to know the name of your business, the value they’ll receive, and where to click to purchase your offering
- ☐ Create a clear path so that there is minimal thinking involved of what someone should do next. (ex: The path for a strategy call sign up 1) Click the “sign up button/fill out the form 2) Schedule the call 3) Pay for the future sessions after you have had the call)

**Market Your Product**☐ Branding

- ☐ Define what your company’s identity is
- ☐ Complete your style guide



☐ Methods of outreach

- ☐ Determine what platform your ideal customer is using.
- ☐ Be sure to always have a clear goal in mind when creating the content for these emails, pages, and automations.
- ☐ Create a pipeline to engage new customers
- ☐ If you have existing customers, be sure to send them a re-engagement email broadcast and/or sequence.
- ☐ Remove any inactive subscribers from your list to improve email deliverability

☐ Creating lifetime value

- ☐ Determine ways that you can surprise your members with value
- ☐ Offer existing customers exclusive pricing or discounts for other courses that you sell

☐ Measure email success

- ☐ Check your numbers to see how you fall in comparison
- ☐ Keep your list clean by deleting inactive users who are not opening emails
- ☐ Edit existing campaigns appropriately (ex. If a pipeline is performing poorly, reassess and try switching up imagery)