CONTENT FACTORY

COURSE BUILDER

COURSE

DENNIS YU

COURSE BUILDER

SYSTEMATIZE AND MONETIZE YOUR KNOWLEDGE

content_factory_course_builder_guide_v9.0_2023_0725

GUIDE VERSION

Table of Contents

Welcome!

When I was 12 years old, I'd fly all over the country to compete in math contests. This instilled in me a worldview that I still carry to this day. It has allowed me to see clear resolutions to many complex problems I've encountered, using what I like to call "malgorithms."

Here's an example of one I've been working on for a few years and has proven to be true time and time again: The best people share knowledge freely out of their hearts, reflecting their individual passion for life.

Knowledge and passion have a symbiotic nature. How can you be passionate about something you aren't educated on? Or truly knowledgeable about a subject you don't care about?

You can try, but a person who is not passionate about what they know will have issues when trying to break concepts down to a level that anyone can follow. Have both and you can break down concepts into step-by-step sequences anyone can follow.

Sequences aren't simply just a list of directions that tell you what to do; they tell you why you should do it. This is why the "one-step conversion" marketers must change to become sequence marketers that guide their customers through their journey.

Introduction

[Video: Course Builder Course (39:00)]

Goals, Content, and Targeting

Unlocking Your Path to Success

Unlock the Journey ➔
Click Here for your #GCT form

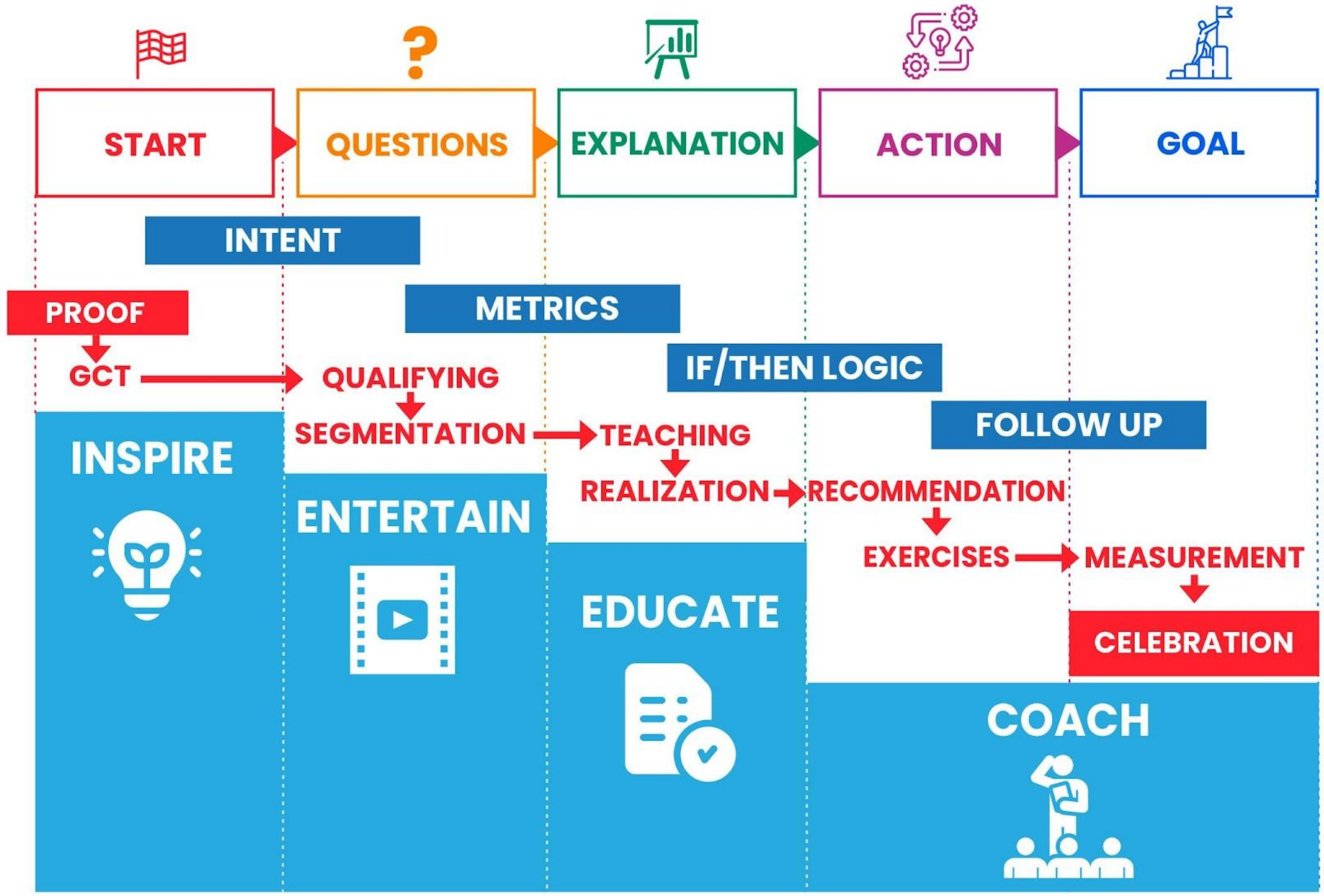
Welcome to the path of success! At the Content Factory, we are deeply committed to helping you achieve your goals in course building, video recording, lesson creation, and module development. Our expertise lies in understanding your unique vision and target audience, allowing us to deliver extraordinary outcomes that cater precisely to your needs.

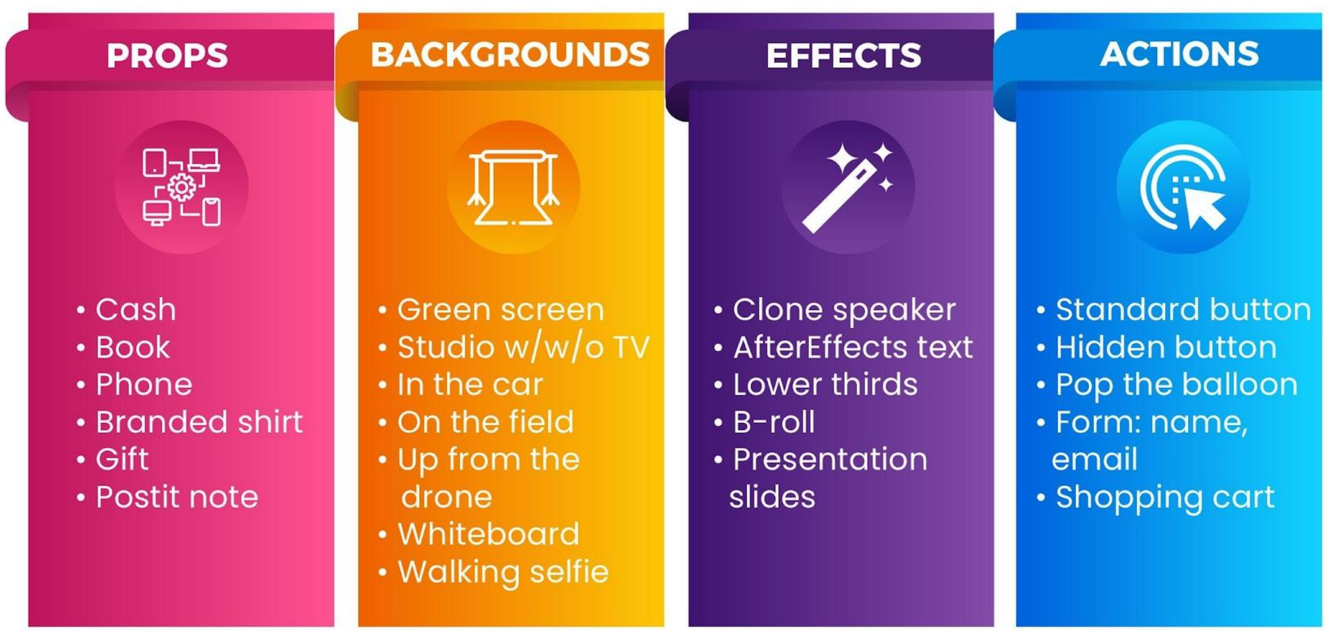
Are you eager to unleash your full potential? The journey begins right here. Take that bold first step towards excellence by completing the form provided below. Our "GCT" evaluation process can help you craft a strategy that will propel you towards your desired objectives. It may allow you to build a marketing masterpiece that ensures your course reaches its full potential.

Please proceed with the form, and let's set the stage for your remarkable success!

Unlock the Journey ➔
Click Here for your #GCT form


Goals
Business
Strategy
Targeting
Content





Even if you don't know much about cooking, if you have the recipe, all the ingredients, and can follow the directions, you'll be able to make your favorite meal.

There's a 5-star chef in the kitchen advising you, not doing it for you, but mentoring you at each step. You can't not succeed.

Our company provides the "kitchen", fully stocked with the "ingredients" and utensils to help young chefs create the meal they imagine, serving food to hungry customers who have walked in the door.

This cooking analogy applies to live workshops, our self-paced online learning system, internal coaching, and client interaction.

Neither the hungry customer nor our people in the restaurant (waiters and cooks) need to master every single recipe. If they just want to do Dollar a Day Inception (call them "donuts" or perhaps some appetizer), we can follow just that recipe. Later we can prepare the main course, driving sales, tuning the plumbing, and so forth.

Anyone who has knowledge about anything (not just digital marketing, could be playing the guitar, sewing, etc.) can contribute their recipe for success through our system.

It's one thing to learn about cooking by watching Rachel Ray on TV, another by going to Whole Foods to buy the ingredients and then trying to make that meal all by yourself, and an even higher level showing up at a kitchen where everything is set up for you and there are expert chefs to help you.

Course Creation Process

1. Create a Basecamp Project for each full-blown course.
2. Create a list of lessons and topics.
3. Film or collect course videos.
4. Create a course intro and outro with the course partner (if applicable).
5. Edit the videos (Upload to Wistia).
6. Transcribe Videos (If you use FancyHands, follow the correct process).
7. Create a guide from the transcription of the videos.
8. Load the videos (Wistia Videos, not YouTube) and course content into the Academy. This includes a quiz and badge upon completion.
9. Build a landing page (Who it's for and not for), Why it's valuable, Process after purchasing). Include the guide download upon purchase. Similarly, help us create a blog post for every term we often use, so we can repurpose content to rank on search results.
10. Make a product and order form in IFS. (Do not do this if you have not taken the Infusionsoft Basics Course).
11. Make course tags in infusionsoft and add them to the Academy. (Level 4+ only).
12. Post from Public Figure Page.
13. Boost and promote the course to drive awareness.
14. Create a fulfillment campaign in Infusionsoft.

    See our 1,000 Task Library on how to accomplish each particular task.

Course Creation Process (Checklist)

- ☐ This course has an introduction and a title.
- ☐ Create intro and outro videos with the course partner (if applicable).
- ☐ It has a one-pager (checklist/cheat sheet).
- ☐ It has a cover photo.
- ☐ It has the current guide available after purchase.
- ☐ It has lessons/topics that contain edited videos with no RAW mistakes and are embedded through Wistia or Lightspeed VT.
- ☐ The course has a quiz (MICRO courses should have 10 questions and standard courses should have 20 questions).
- ☐ It has a badge loaded with the correct requirements.
- ☐ It has a landing page with a CTA checkout button that links to the shopping cart/order form.
- ☐ The course is set up with Dynamic Conversion tracking.
- ☐ It has associated auto-enroll tags associated with Infusionsoft.
- ☐ There is no content with previous specialists/VA's who are not with us anymore.
- ☐ Has active fulfillment campaign in Infusionsoft.

After Publishing

- ☐ The course has been promoted on Social Media for $1/day for 14 days.
- ☐ The course is in our Course Catalog, Asset Tracker, and Project Tracker tabs (we want all of these in one document.
- ☐ Update the Course Tracker in the Asset Tracker to document and track all course assets.

Components of a Course

Introduction with Title

- ☐ This course has an introduction with expectations of the courseware and a title.
- ☐ “Why <guide topic>”. You need people to understand why Personal Branding or the topic is important.
- ☐ The strategy behind the checklist. How does it fit with the other checklists (no checklist stands alone, since they’re all linked together).
- ☐ A few sentences from the guide owner (whoever is “adopting” this guide as the resident expert/ curator/ figurehead).

One pager (Cheat Sheet)

- ☐ The checklist boiled down to just one page with checklists items that have check boxes.
- ☐ Summarize the content to a single page of 5 primary items. Each item will have one or more steps.
- ☐ Show overall time summary as well as section times: how much time for a trained analyst to complete the checklist once.
- ☐ Show a single number for Training Time, which is the number of hours to learn the strategic concepts and tactical knowledge necessary to be able to implement (not the implementation time).

Full Checklist with Steps (optional)

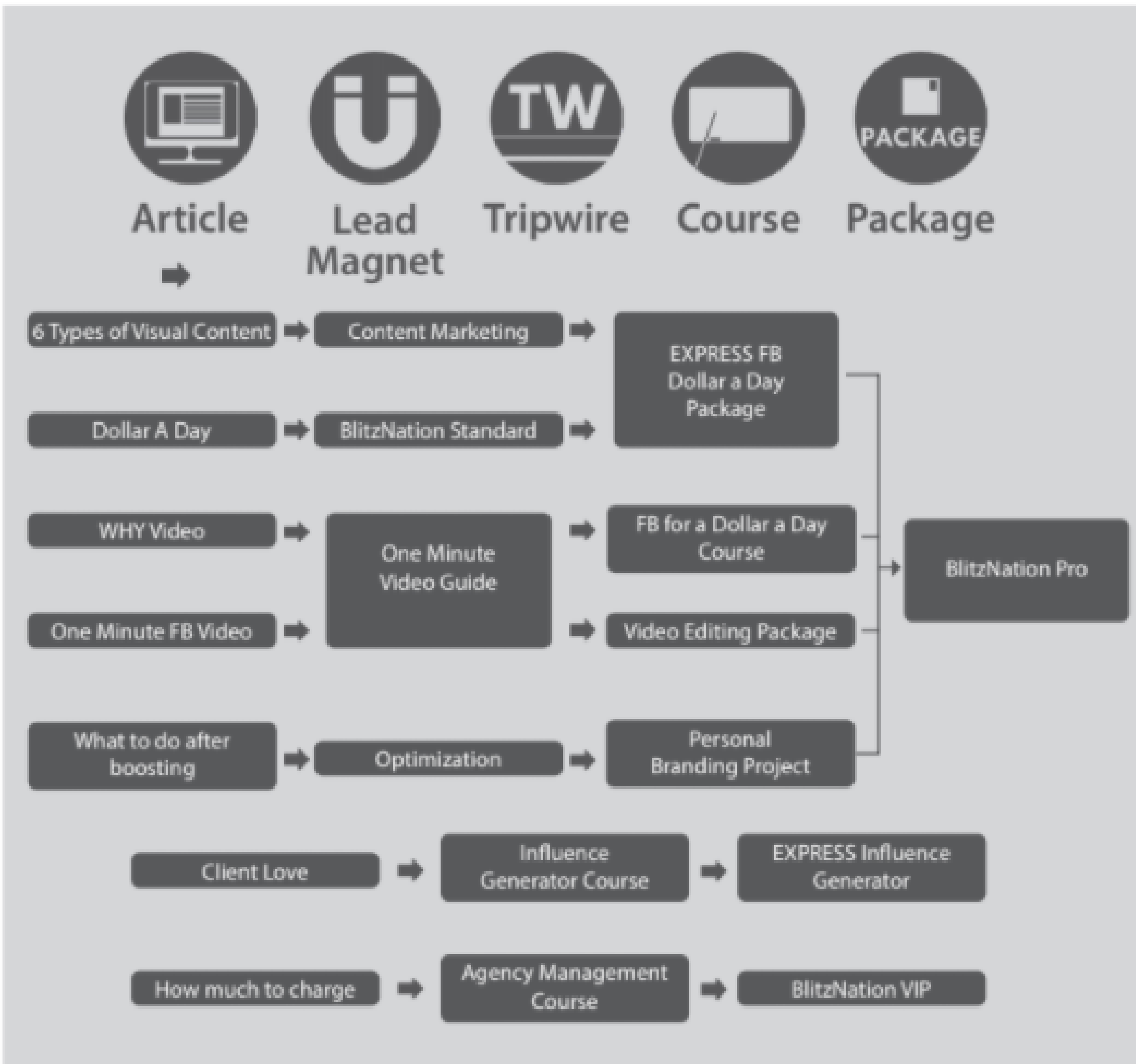
- ☐ If the listing takes 3-4 pages to list out the 5 primary checklist items and step-level detail, then include this section.
- ☐ Show time at the step level, aggregated to the item level and then overall checklist level.
- ☐ Ask the checklist owner to supply what is missing.

Structure Your Course with Video Topics

- ☐ One pager showing the Introductory Video (a live video that should be on the landing page for this checklist, and optional accompanying videos (some made by us and most to be made by the LDS Business College team).
- ☐ Three categories of videos:
    - Live video-with a person talking in front of a camera (used for the introductory video).
    - Video Sharescreened- How-To screen-share is a Go-To-Meeting desktop recording in our YouTube channel showing click-by-click how to do something.
    - Expert Interview- a partner explaining one of the key concepts.

Build Your LADDERS!

Moving people through your Ascension Ladder requires that you have a series of ungated and gated (free and paid) content that moves people through sequentially to your main offer, which is the execution of all of the training you have provided.



5 Types of Content

As we are tagging content with various tags for level, topic, related task, and so forth-- make sure to have a column (not a tag on what level access the content is for:

- **Public** -- anyone can see it, like on a public figure page or blog.
- **Gated (free)** -- they must be logged in to our system.
- **Gated (course specific)** -- they must be customers of that course.
- **Gated (Office Hours)** -- anyone with a current, valid membership.
- **Internal** -- CoachYu Content Factory team members only.

Work-in-progress content is internal, by definition, since it's not ready for publishing. As we are tagging content with various tags for level, topic, related tasks, and so forth.

Google Doc versions of our checklist guides are INTERNAL GUIDES in finer detail so that internal resources can execute these steps.

The difference with the internal guides (besides living in Google Docs instead of in these PDFs) is that internal users (our team members):

1. Have access to specific systems that we've integrated to help us speed up the work-- increasingly so because we are trying to automate the whole thing. Of course, businesses who buy a $7 guide don't get access to these, except the dashboard for metrics.
2. Task verification and QA-- of course, we don't provide human support to non-clients. And given that they're not working for us, they don't have to agree to or abide by our standards. But we can provide automated follow-up in Infusionsoft and the dashboard to nudge nonclients along the DIY path.
3. Payment and job progression-- to get paid per hour/task based on level, as in our leveling system. This is the analyst track-- running parallel to the business track-- not what a busy business owner would want to understand nor spend sufficient time to do themselves.

So it's okay to have PURCHASABLE GUIDES and INTERNAL GUIDES, so long as we understand that the former has step-by-step instructions to accomplish the tasks via systems they have access to without support from us. The internal guides should be built from the purchasable guides-- not the other way around.

Full Course vs. MICRO Course

A "MICRO" course (webinar) is a single-session training. Because the audience of Office Hours is entrepreneurs, the strategy level is going to be too high for most VAs to be able to understand or execute. Strategy (#GCT) requires expert communication skills-- closing deals, teaching, and other business (entrepreneurial) functions. But there are supporting tasks for VAs and account managers that can go into the Task Library. And most of the "MICRO" courses roll up into the larger, fundamental courses in the 18-module architecture.

The MICRO version of any course is the most basic version that a Level 1 VA could complete by themselves.

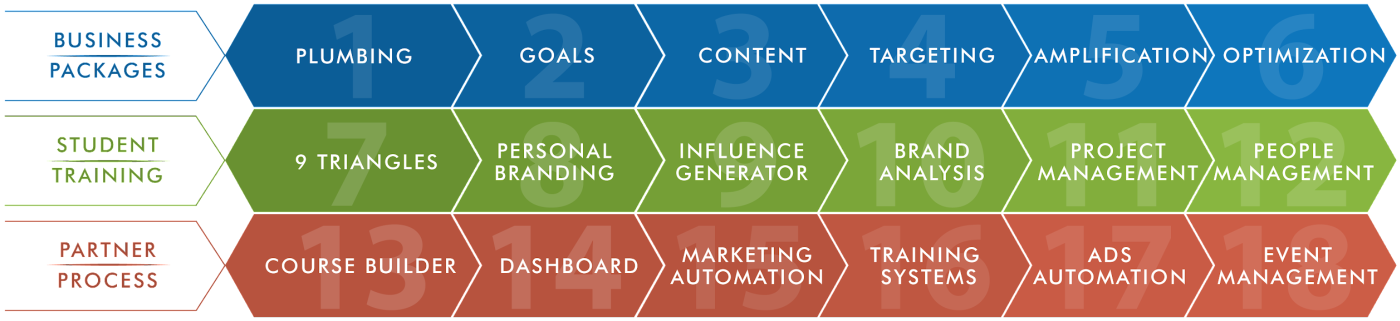
Consider what is fundamentally necessary and simple to drive results for a local service business-- mainly real estate agents or doctors serving their city.

The full course covers everything, which means advanced topics that include what national brands, B2B, enterprises, and other sophisticated businesses are doing.

For a Digital Marketing Agency, when people get the full digital plumbing course, they can see what digital plumbing is and how it fits into the 6 phase SAE-- mainly concepts and tactics (two of the three hierarchical levels in the Course Builder Course of strategy>tactics>tasks).

- **If they're a VA**, they then get certified through the MICRO version of digital plumbing, which is what they implement for local service clients.
- **If they're a local service business**, they could take the Digital Plumbing Course mainly to understand what the VAs are doing, but it's not anymore necessary than a car owner going into the service bay to see what the mechanic is doing or the restaurant customer going into the kitchen to see how to cook-- though they may aspire to be like Rachel Ray or Gordon Ramsey.
- **If they're an agency owner**, they need to know more than the client, but not as much as the VA. They are the waiters in the restaurant who coordinates between the customers and the cooks.

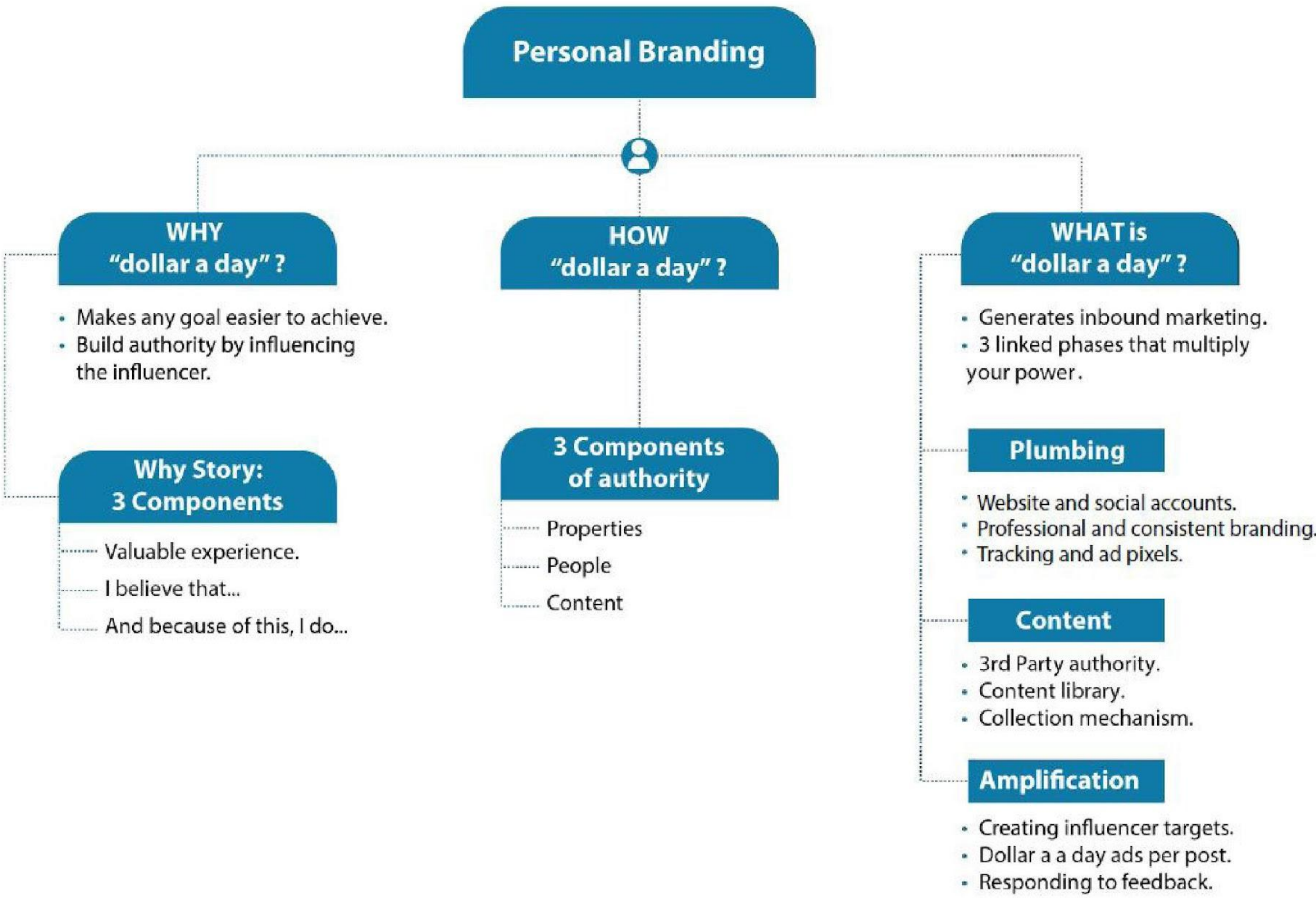
What I've described above is the **#SBP** triangle, which is one of the 9 Triangles-- for specialists, businesses, and partners. You can find a deeper explanation in the Master Guide, so don't assume this summary is complete.



What you'll see for every course is that in our 18-module architecture, each of the 18 main courses is complete. But because there is so much to potentially learn in the world of business, we want to give people just what they need to competently do their job. Refer to the analogy of the factory worker, factory manager, and factory architect for the level of understanding and scope of the training and process any person needs.

Digital Plumbing is but one of many areas, which ties to a checklist of tasks that reference back to the Task Library.

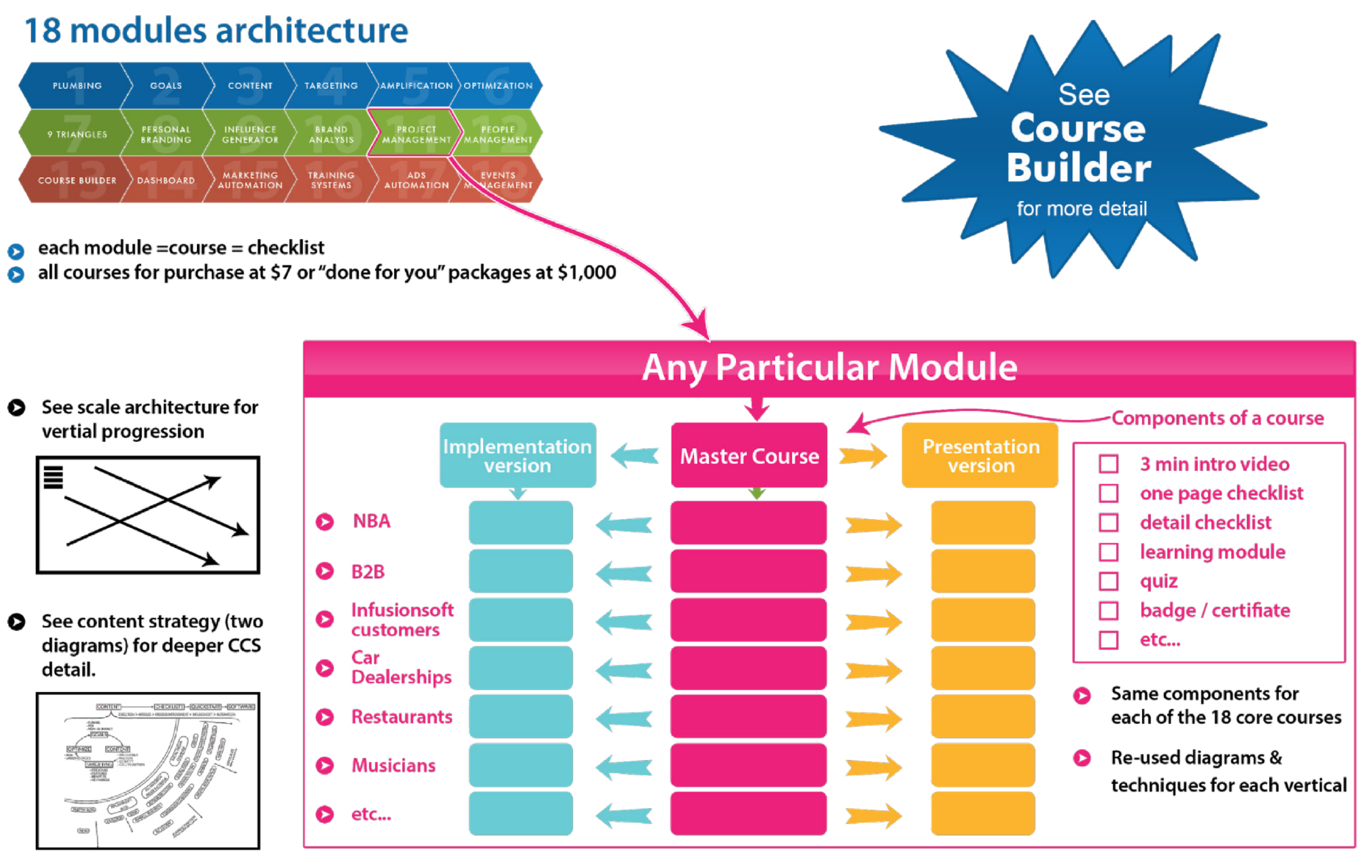
Structure A Course Into Topics Of WHY, HOW, And WHAT



18 Modules Architecture

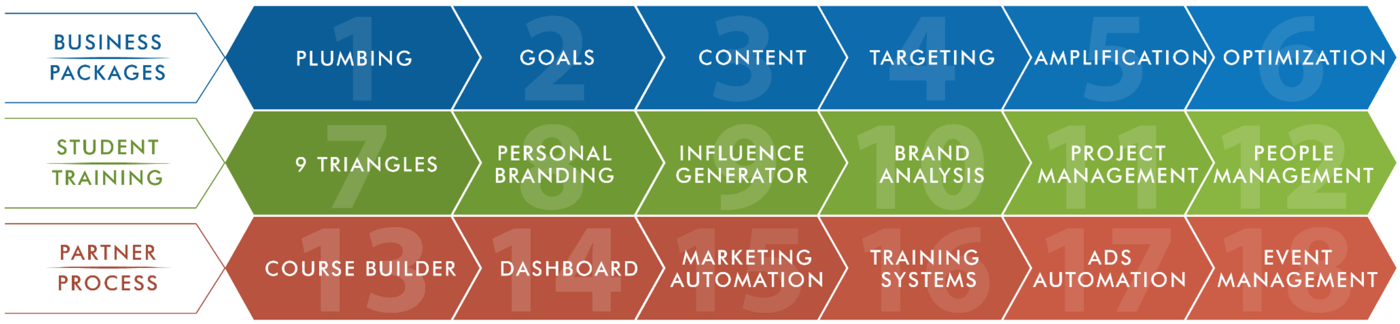
We create a presentation version (mainly diagrams, and videos, but less text) and a guide version (the presentation version with detailed text explanations) of each course. Then, people can read the guide by themselves to absorb all the principles. But they might also prefer watching videos or live presentations of us explaining-- thus the presentation version where we speak the words. We create the guide version first.

We show page numbers small in the presentation versions, so that we can easily reference pages and so that whoever is presenting has an idea of where they are.



Application:

Create little tactical videos of 30 seconds to 3 minutes on anything you think new analysts or clients would trip on, internal or not. Then we can tag these videos with which of the 9 Triangles and where in our 18-box process architecture they fit.



For example:

- How do you find workplace counts (the subject of this thread)?
- How do I create saved audiences?
- What is Boomerang for Gmail and how do I use it?
- How do I log into Basecamp?
- How do I use the Facebook Chrome Pixel Helper?
- What is a carousel ad and how do I make one?
- What are behavioral targets (partner categories, Acxiom, Datalogix, Epsilon)?
- How do I log in to take a quiz?

We have strategic videos of an hour that cover core principles:

- The 9 Triangles.
- Each of the 9 Triangles and how they equip us to solve business problems.
- The 18-box process architecture and how it ties together analysts, businesses, and partners.
- Each of the 18 boxes/checklists.
- What is my WHY and how do I go about clarifying it?

Any content we produce must fit in our system (tactical, conceptual, or strategic), then with the associated topic. We may have versions of the content as articles, videos, courses (for reading), and decks (narrated). We then have quizzes on them (longer content means longer quiz with 10 questions for Micro Courses and 20 questions for Standard Courses) that leads to badges (small, simple achievement) and certification (larger, like a mini-degree).

Training videos can be housed on Soapbox under the access@blitzmetrics.com account. We can then share the link in our 1,000 task library under the proper module.

Anyone can contribute, especially folks that are teaching others.

We can configure the LMS and dashboard to sit on anyone's site, skinned however we want, with any content that flows well.

Everyone has their own Infusionsoft, landing pages, and other bits, the process and engineering bits augment your content production.

We need to make checklists accountable, so each task must be such that we can determine if it's done to serve 2 purposes:

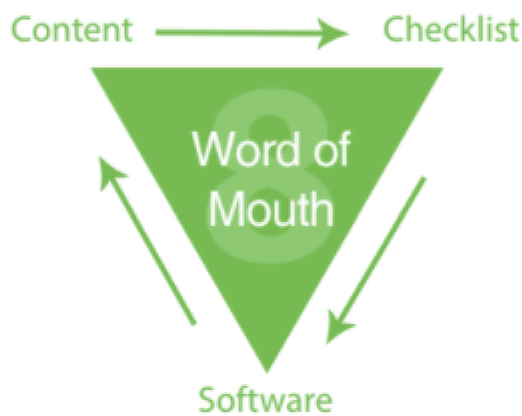
- To measure how many people go through each task.
- To know where people are stuck and encourage them along.

To determine if something is done, there are 3 ways:

- They check the box (honor system).
- They fill in the blank with some value (quiz or intake form).
- The system determines if the action was completed (most valuable, requiring external API to update contact record).

However, to do it reliably, each task needs to be programmatically verifiable. For example, if they must write 3 blog posts, we can check how many posts they wrote, how many words, etc.

Content, Checklist, and Software



Checklists are the central portion of Content, Checklist, and Software, one of our 9 Triangles.

Content that's powerful is a product of your direct execution. It's unique and reinforces your Personal Branding while elevating your client.

Checklists simplify step-by-step execution as well as the communication of that execution. Practice helps to refine these checklists through client and employee suggestions. Requests that are most common take priority in **Software development,** which is the automation of manual efforts.

Once you have other people creating content for you, whether it be through Yelp reviews, blog posts, etc, you gain more authority. People trust what their friends are saying about you more than what you're saying about yourself. Before you automate any of this, you have to know it works. That means creating and using these checklists internally as proof of your methods.

Checklist Step-by-Step

Checklist Step-by-Step

1. Full detail with screenshots, and helpful advice.
2. Link to the quiz (checklist owner to make one).

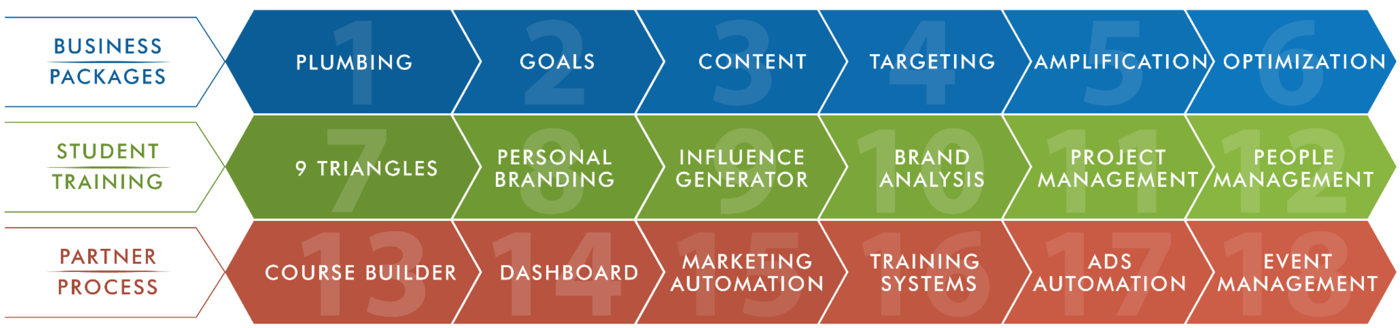
    10 questions for Micro Courses. 20 questions for Standard Courses.
    Questions per quiz:
    - Strategic (9 triangles): 20 questions.
    - Conceptual (guides): 10 questions.
    - Tactical (checklists): 5 questions.
3. Next checklist(s) in the sequence.
4. A flowchart (the “you are here” in the overall checklist sequence).

Checklist One Pager

In the next pages is the 18 modules that comprise our platform. For every topic you teach, you'll need to get your plumbing in place, set up your #GCT (goals, content, targeting), systematize and monetize your knowledge (marketing automation + learning management), and generate income.

Consider how your checklist or series of checklists helps your target audience achieve their goal. Your traffic levels and compensation are directly tied to your ability to generate value for them.

Include a background image as much as you can that shows you or your people interacting with others in a group setting.



Have 3 one-page summaries for every course/guide:

1. Qualifying (necessary ingredients for the recipe) - Each entry must contain a word or a few words.
2. Execution checklist (the recipe steps itself) - Each entry must be an imperative sentence.
3. Verification (to validate we did all the steps) - Each entry must be a declarative sentence.

For each checklist item, we want to make sure:

1. That it's S.M.A.R.T.
   - Specific, Measurable, Achievable, Relevant & Time-oriented
2. We define IF/THEN logic where possible. For example:
   - IF another internal team member has fulfilled the dependency, THEN archive the email or email thread.
   - IF you encounter a video that has an associated task in the "1000 ingredient kitchen" THEN you just have to put it before the video.

    - IF you can demonstrate competency through repeated execution, THEN you deserve advancement and company-wide praise for it.
3. We have a short video and accompanying text explanation showing how to accomplish the task, done by someone who has reliably executed this successfully at least times.
4. We have at least 3 others who have executed this successfully 3 times each before it goes beyond this course into our larger process.
5. We understand there are 4 roles involved. For example, only 2 of the 4 roles should see our list of public figures we have listed and only people who have access to the course should be able to see the LightSpeed video.

How To Download Images From A Google Document Or Other Text Editors

Google Documents is used to open and edit Microsoft Word documents. Download your Google doc as a Word document so it has a standard Word extension (.docx).
Download your docs with the following extensions: ODT, PDF, RTF, HTML, TXT, EPUB.
However, you can only download your Word Online documents as PDF, ODT, or DOCX files
And if you want to open a Google doc in Word, you'll need to convert it first.
One area Word has Docs beat is PDFs.

Qualifying Checklist:

- ☐ To get the access of google drive
- ☐ Editing access to the Google Drive
- ☐ Image which you want to edit
- ☐ Need to access the "Edit" tab present on the top of the toolbar.
- ☐ Have Google document containing the images

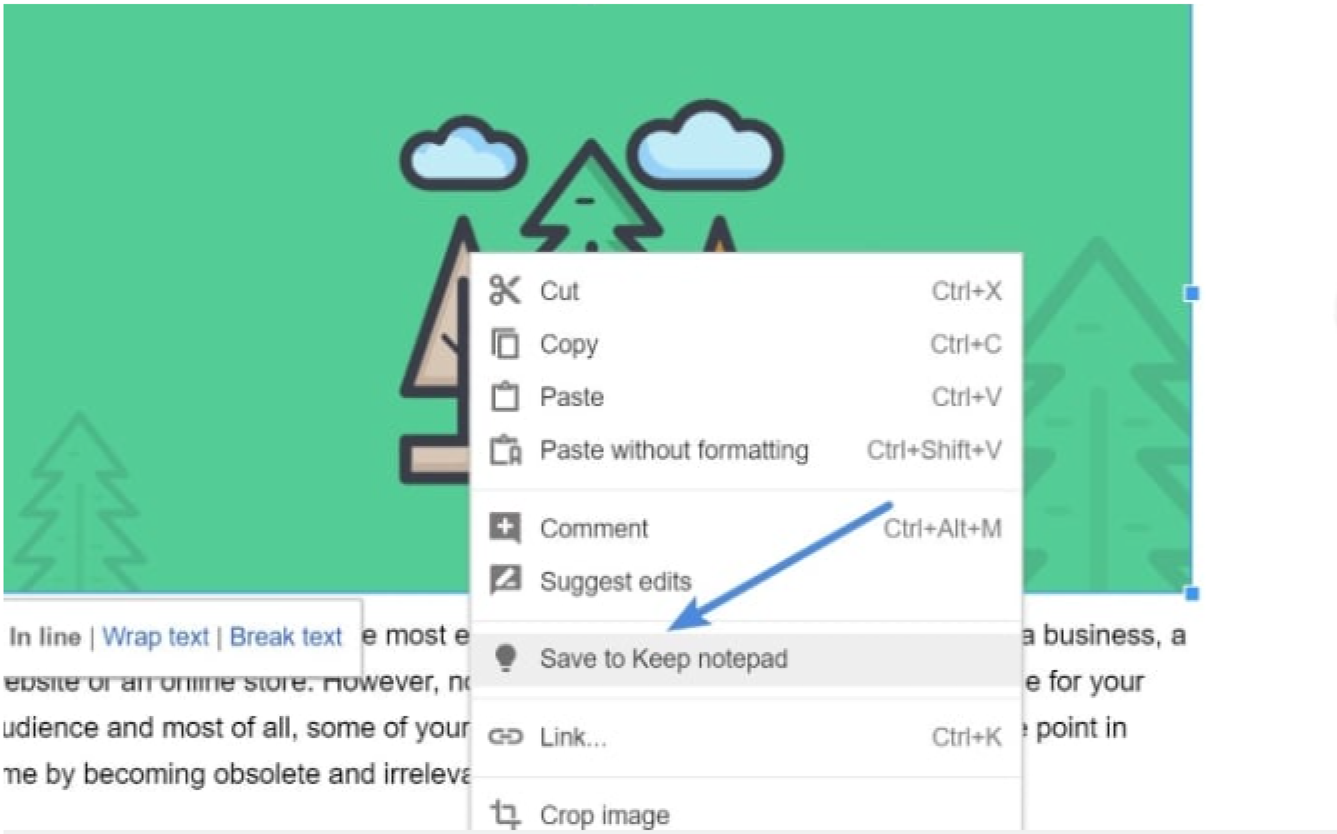
Execution checklist:

The list of items you need before you download an image from google documents or other text editors

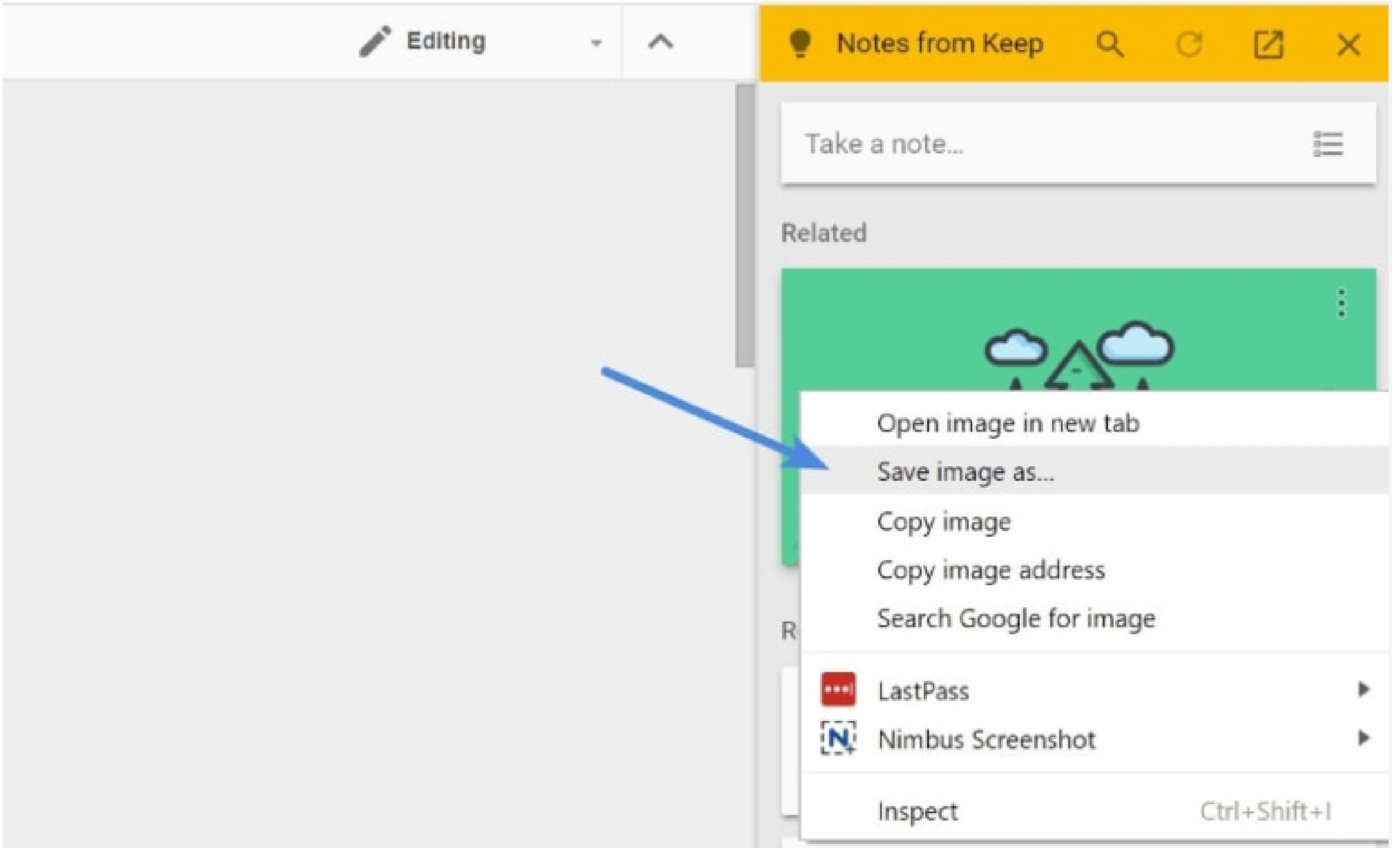
- ☐ To get the Google Drive access
- ☐ You can sign in with your Gmail account

Google Keep is a note-taking app that is now integrated with Google Docs. This means you can open a Note from the Keep sidebar in Google Docs. And the best part is, when you right click or control click on an image there, you get the 'Save Image As'!

- ☐ To save a picture to Keep, right-click or control click an image in a document. You get Google's custom secondary menu which has *Save to Keep notepad* option in the 'view more actions'.



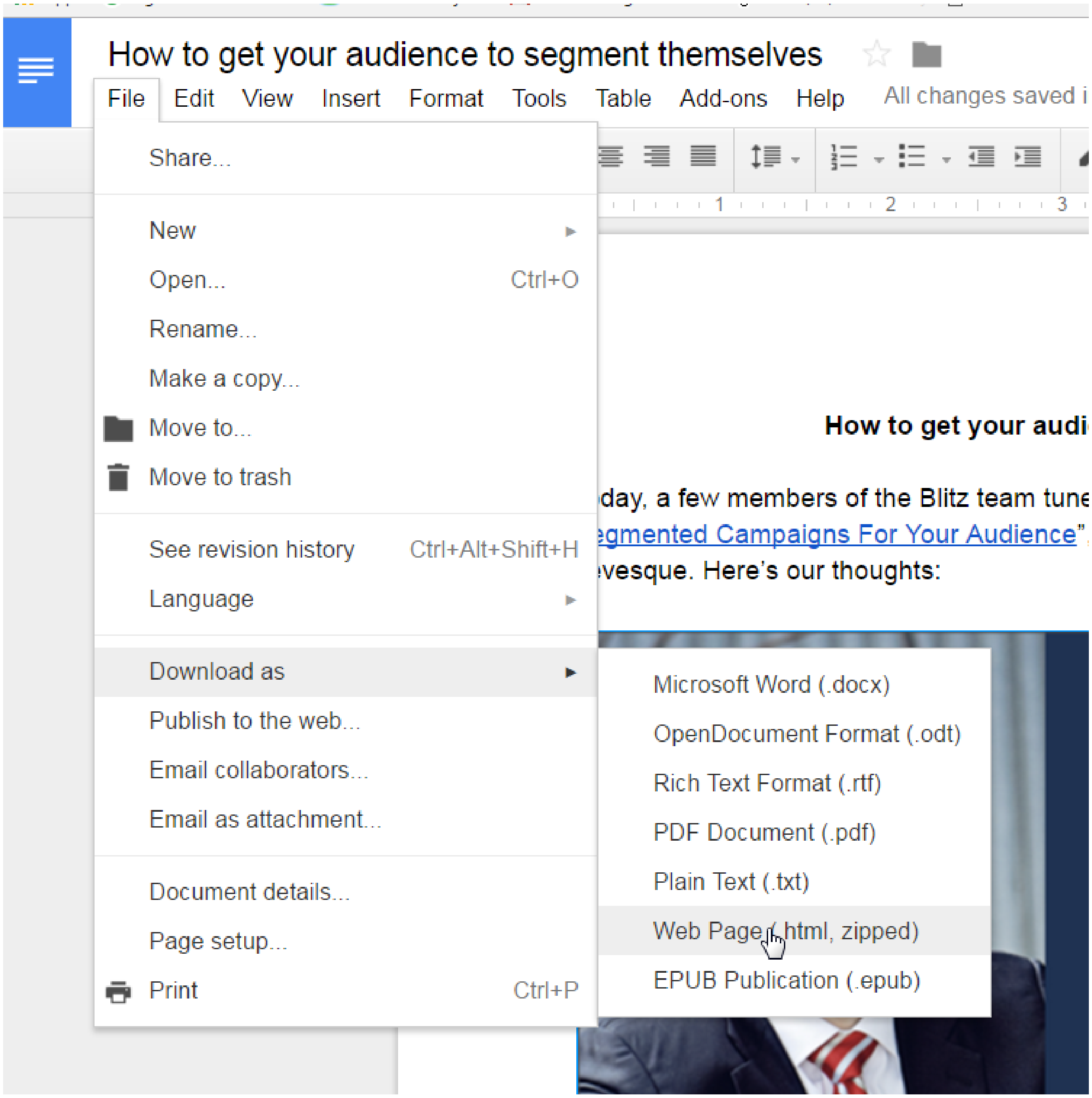
- [ ] The image appears on a panel on the right side of the screen. Right-click on the image to select the option of "Save image as..." to conclude saving it.



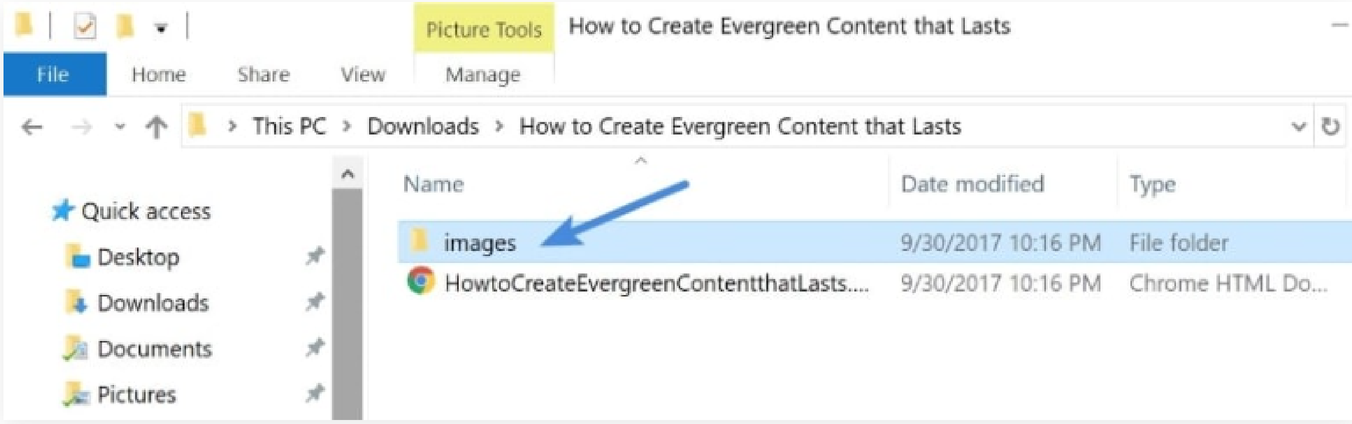
You will need to go back into Google Docs and download the file as a web page to get the images. This also works with Microsoft Word (.doc / .docx) files.

Download Through Web Page

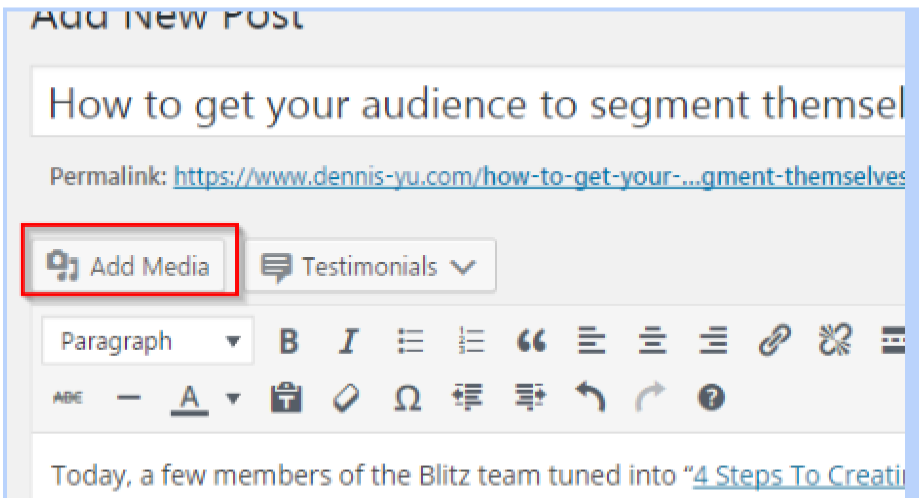
You can consider using the simple feature of accessing the image as a web page for downloading. Open the specific file and select the "File" tab to access the option of "Download As" followed by "Web Page (.html, zipped)."



From your computer, unzip the file and select the "images" folder. The images appear in a separate folder that can be easily used for various purposes.



You will need to extract the contents to a folder of your choosing.
To re-add the images into the article, click on the **Add Media** icon near the top left of the article in Wordpress.



Click on Upload Files at the top and then, Select Files.

Verifying that it is an image of a document and not anything else.
Image Doesn't have blur, glare.
There is no duplication of the method.
There is no duplicate image .

How To Add A Thumbnail For An Academy Course

1. Go to the [Asset Tracker's Course Tracker tab].
2. Fill in the Module # by matching the column Module # from the Guide Doc tab
3. Go to [Office Hours Covers - PowerPoint].
4. Duplicate the file with the corresponding Module#.
5. Place the file in [Office Hours Featured Images].
6. Rename the file "[CourseName] Featured Image"
    - e.g. **Amplification Course Featured Image**
7. Remove "Office Hours" and "Micro".

8. Insert a text box at the right side and write the name of the course.
    - e.g. https://docs.google.com/presentation/d/1fTR7XvtHCjK8QYKfztVDD-4bNtN1P__4/edit#slide=id.p1
9. In the [Asset Tracker's Course Tracker tab], place the URL under the "Featured Image" column.
10. Download the file as a PNG.
11. Upload the image to the Academy as a featured image.
12. Repeat steps 1 to 11 for all thumbnails.

How To Update the Academy Course With The New PDF File

Course Creation Communication

As part of process building, let's iterate in Basecamp, so we don't accidentally spawn separate email threads doing the same thing multiple times in parallel.

Part of how we have checks and balances is to always link to the Basecamp thread where we are iterating, not the actual document itself.

In our iteration process, we are constantly improving our materials, so there will be new versions often.

If we link to a particular document, which is a particular version, then whoever looks in an email thread, will have only an old version to look at-- when in Basecamp, we might be many versions ahead.

5 Types of Content

As we are tagging content with various tags for level, topic, related task, and so forth-- make sure to have a column (not a tag on what level access the content is for:

- **Public** -- anyone can see it, like on a public figure page or blog.
- **Gated (free)** -- they must be logged in to our system.
- **Gated (course specific)** -- they must be customers of that course.
- **Gated (Office Hours)** -- anyone with a current, valid membership.
- **Internal** -- Content Factory team members only.

Work-in-progress content is internal, by definition, since it's not ready for publishing. As we are tagging content with various tags for level, topic, related tasks, and so forth.

Google Doc versions of our checklist guides are INTERNAL GUIDES in finer detail so that internal resources can execute these steps.

The differences with the internal guides (besides living in Google Docs instead of in these PDFs) is that internal users (our team members):

Have access to specific systems that we've integrated to help us speed up the work-- increasingly so, because we are trying to automate the whole thing. Of course, businesses who buy a $7 guide don't get access to these, except the dashboard for metrics.

Task verification and QA-- of course, we don't provide human support to non-clients. And given that they're not working for us, they don't have to agree to or abide by our standards. But we can provide automated follow-up in Infusionsoft and the dashboard to nudge nonclients along for the DIY path.

Payment and job progression-- to get paid per hour/task based on level, as in our leveling system. This is the analyst track-- running parallel to the business track-- not what a busy business owner would want to understand nor spend sufficient time to do themselves.

So it's okay to have PURCHASABLE GUIDES and INTERNAL GUIDES, so long as we understand that the former has step-by-step instructions to accomplish the tasks via systems they have access to without support from us. The internal guides should be built from the purchasable guides-- not the other way around.

Full Course vs. MICRO Course

A "MICRO" course (webinar) is a single session training. Because the audience of Office Hours is entrepreneurs, the strategy level is going to be too high for most VAs to be able to understand or execute. Strategy (#GCT) requires expert communication skills-- closing deals, teaching, and other business (entrepreneurial) functions. But there are supporting tasks for VAs and account managers that can go into the Task Library. And most of the "MICRO" courses roll up into the larger, fundamental courses in the 18 module architecture.

The MICRO version of any course is the most basic version that a Level 1 VA could complete by themselves.

Consider what is fundamentally necessary and simple to drive results for a local service business-- mainly real estate agents or doctors serving their city.

The full course covers everything, which means advanced topics that include what national brands, B2B, enterprise, and other sophisticated businesses are doing.

For a Digital Marketing Agency, when people get the full digital plumbing course, they can see what digital plumbing is and how it fits into the 6 phase SAE-- mainly concepts and tactics (two of the three hierarchical levels in the Course Builder Course of strategy>tactics>tasks).

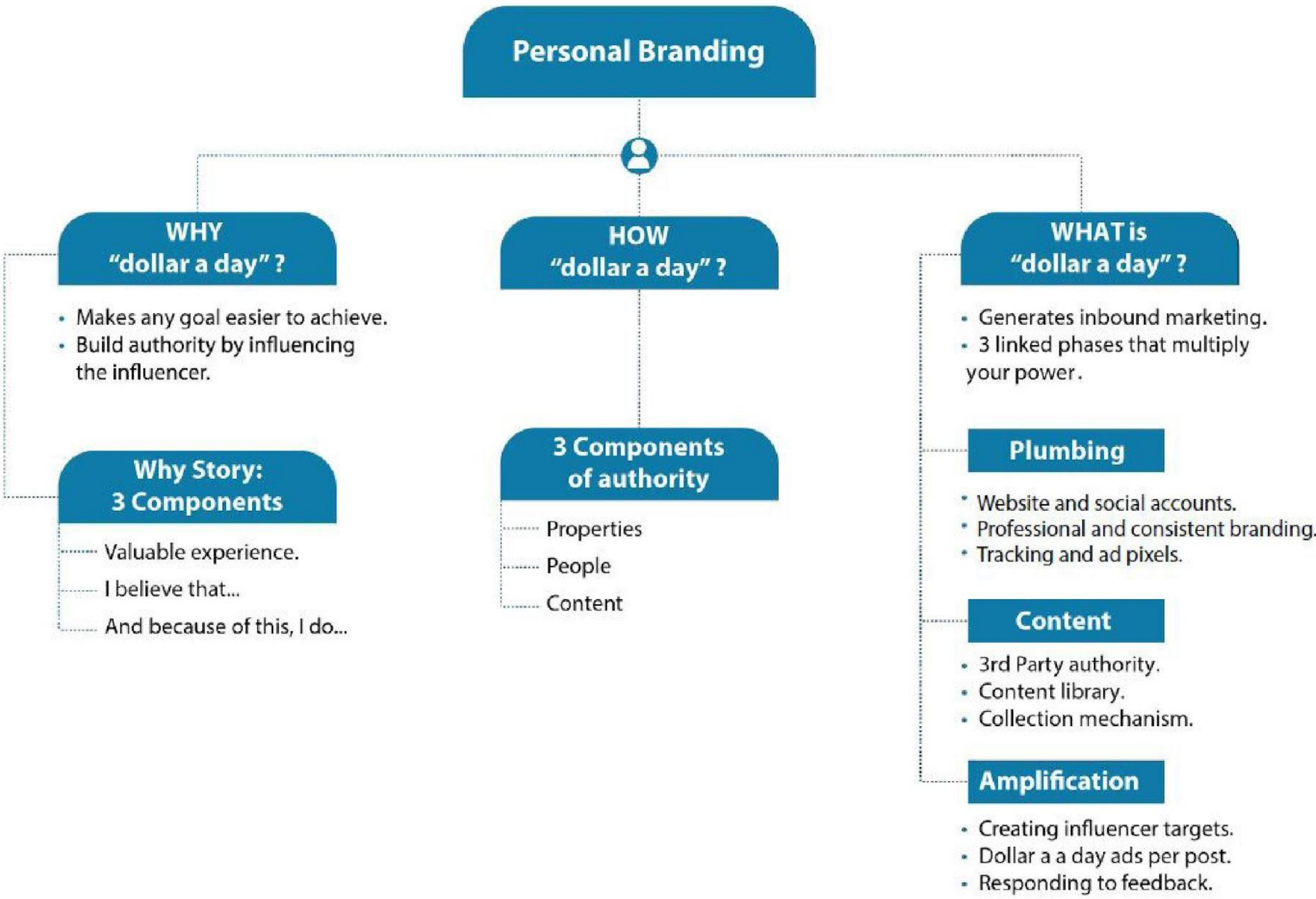
- **If they're a VA**, they then get certified through the MICRO version of digital plumbing, which is what they implement for local service clients.
- **If they're a local service business**, they could take the Digital Plumbing Course mainly to understand what the VAs are doing, but it's not any more necessary than a car owner going into the service bay to see what the mechanic is doing. Or the restaurant customer going into the kitchen to see how to cook-- though they may aspire to be like Rachel Ray or Gordon Ramsey.
- **If they're an agency owner**, they need to know more than the client, but not as much as the VA. They are the waiters in the restaurant who coordinate between the customers and the cooks.

What I've described above is the **#SBP** triangle, which is one of the 9 Triangles-- for specialist, business, and partner. You can find a deeper explanation in the Master Guide, so don't assume this summary is complete.

What you'll see for every course is that in our 18 module architecture, each of the 18 main courses is complete. But because there is so much to potentially learn in the world of business, we want to give people just what they need to competently do their job. Refer to the analogy of the factory worker, factory manager, and factory architect for the level of understanding and scope of the training and process any person needs.

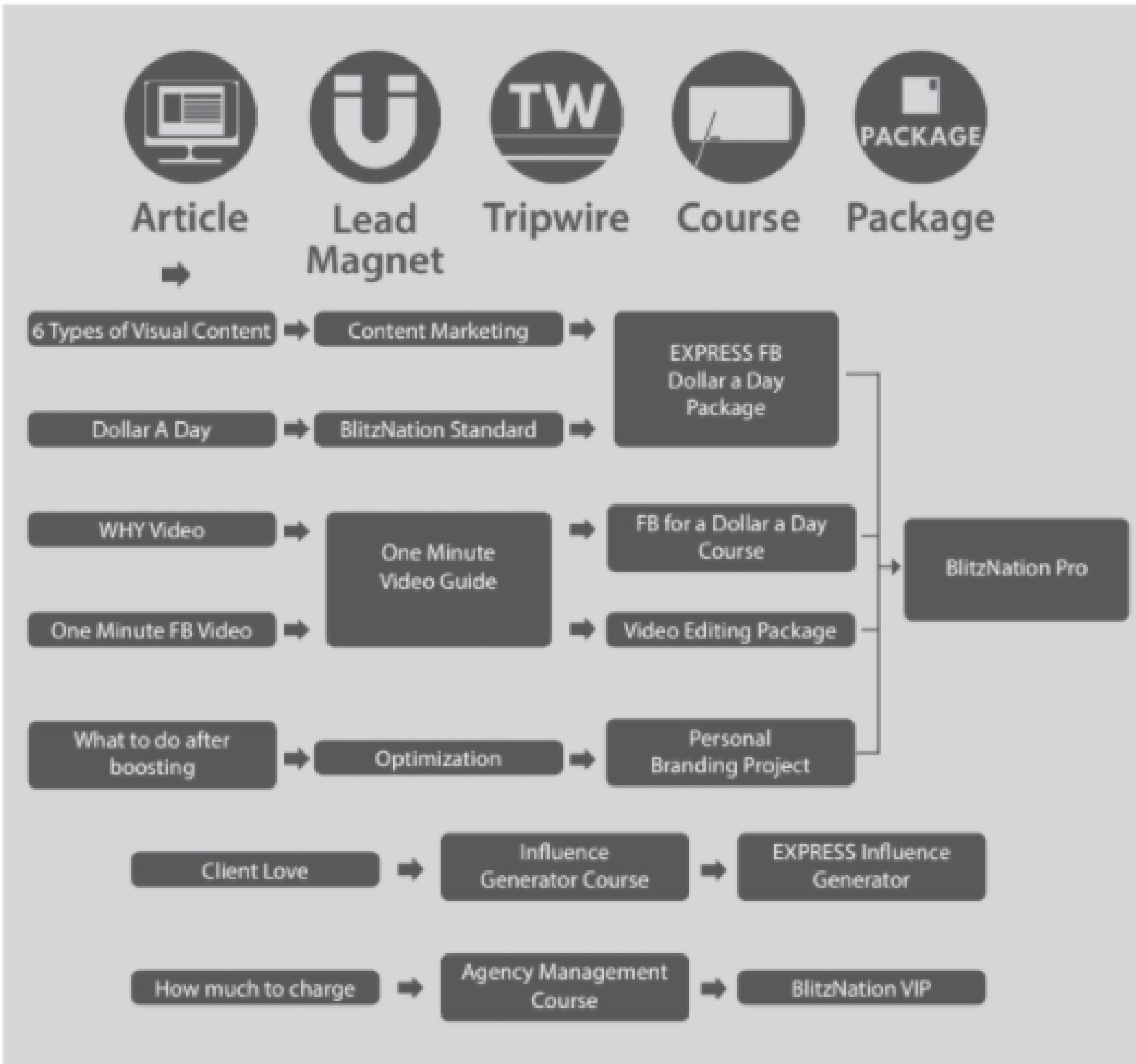
Digital Plumbing is but one of many areas, which ties to a checklist of tasks that reference back to the Task Library.

Structure A Course Into Topics Of WHY, HOW, And WHAT



Build Your LADDERS!

Moving people through your Ascension Ladder requires that you have a series of ungated and gated (free and paid) content that moves people through sequentially to your main offer, which is the execution of all of the training you have provided.



Learn, Do, Teach

Asset Tracker - CoachYu

	cobn	Presentation BC Thread	Google Document URL	Google Doc Basecamp Thread	Module #	Google Drive Folder
2	Social Amplification Engine	Presentation Thread	https://docs.google.com/docu	https://3.basecamp.com/4057	1-6	Google Drive
3	Content Engine	None	https://docs.google.com/doc	https://3.basecamp.com/405		
4	Digital Plumbing	Presentation Thread	https://docs.google.com/doc	https://3.basecamp.com/405	1	https://drive.google.com/drive
5	Facebook for a Dollar a Day	Presentation Thread	https://docs.google.com/docu	https://3.basecamp.com/405	4	Google Drive
6	Standards of Excellence	Presentation Thread	None	None	2	https://drive.google.com/driv
7	9 Triangles					
8	Micro Digital Plumbing	Presentation Thread	https://docs.google.com/doc	https://3.basecamp.com/405	1	https://drive.google.com/drive
9	Content Marketing Course	Presentation Thread	https://docs.google.com/docu	https://3.basecamp.com/405	3	folders/1vQto4toX_uwVvyVvM
10	Digital Marketer lab elite: BUILD & BOOST A FULL-FUNNEL OF	Presentation Thread	None	None	3	https://drive.google.com/driv
11	I help X achieve Y via Z	https://3.basecamp.com/4057	None	None	3	https://drive.google.com/driv

Whatever we learn how to do, we turn it into a checklist, which becomes a course (DIY) and then a package (done for you).

Incentives for Documenting Expertise

Are you an expert at doing something repeatedly that you're willing to teach? If it's a task that you believe can be reliably don to the related training.e by others on a repeating basis, then we'd like to put that task in our marketplace, linked

We pay a bonus of $200 for every new task that you upload that I approve-- though the real reward is seeing other people find employment. We have training on how to document how to do a task-- which is simply a Zoom, Loom, or me interviewing you step-by-step.

We pay another $300 if we can get 3 people to successfully do that task without intervention. And another $500 if 3 external customers give us 5 stars on that task being done by workers other than you in our marketplace (SPP).

And then a revshare to you on every time that task is completed in the marketplace, so you have incentive to keep the training current and ensure our international workers are successful.

You ready to share your knowledge, create jobs, and earn together? Visit the page, Document Your Expertise and Teach Others, to learn more about it.

Content, Checklist, Software

Checklists are the central portion of Content, Checklist and Software, one of our 9 Triangles. Content that's powerful is a product of your direct execution. It's unique, and reinforces your Personal Branding while elevating your client.

Checklists simplify step-by-step execution as well as the communication of that execution. Practice helps to refine these checklists through client and employee suggestions. Requests that are most common prioritize Software development, which is automation of manual efforts.

Once you have other people creating content for you, whether it be through Yelp reviews, blog posts, etc, you gain more authority. People trust what their friends are saying about you more than what you’re saying about yourself. Before you automate any of this, you have to know it works. That means creating and using these checklists internally as proof of your methods.

Checklist Step-by-Step

Checklist Step-by-Step

1. Full detail with screenshots, helpful advice.
2. Link to the quiz (checklist owner to make one).

    10 questions for Micro Courses. 20 questions for Standard Courses.
    Questions per quiz:

    - Strategic (9 triangles): 20 questions.
    - Conceptual (guides): 10 questions.
    - Tactical (checklists): 5 questions.

3. Next checklist(s) in the sequence.

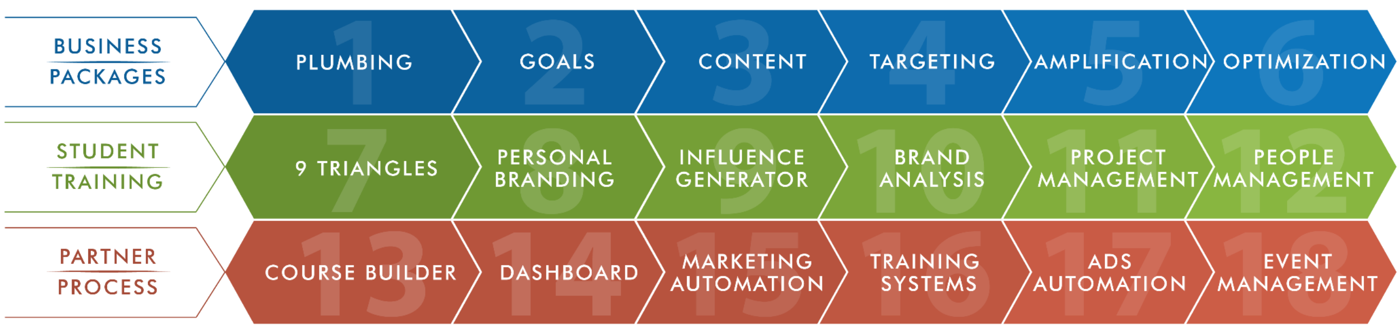
4.A flowchart (the "you are here" in the overall checklist sequence).

Checklist One Pager

In the next pages are the 18 modules that comprise our platform. For every topic you teach, you'll need to get your plumbing in place, set up your #GCT (goals, content, targeting), systematize and monetize your knowledge (marketing automation + learning management), and generate income.

Consider how your checklist or series of checklists helps your target audience achieve their goal. Your traffic levels and compensation is directly tied to your ability to generate value for them."

Include a background image if you can that shows you or your people interacting with others in a group setting.



Have 3 one page summaries for every course/guide:

4. Qualifying (necessary ingredients for the recipe) - Each entry must contain a word or a few words.
5. Execution checklist (the recipe steps itself) - Each entry must be an imperative sentence.
6. Verification (to validate we did all the steps) - Each entry must be a declarative sentence.

For each checklist item, we want to make sure:

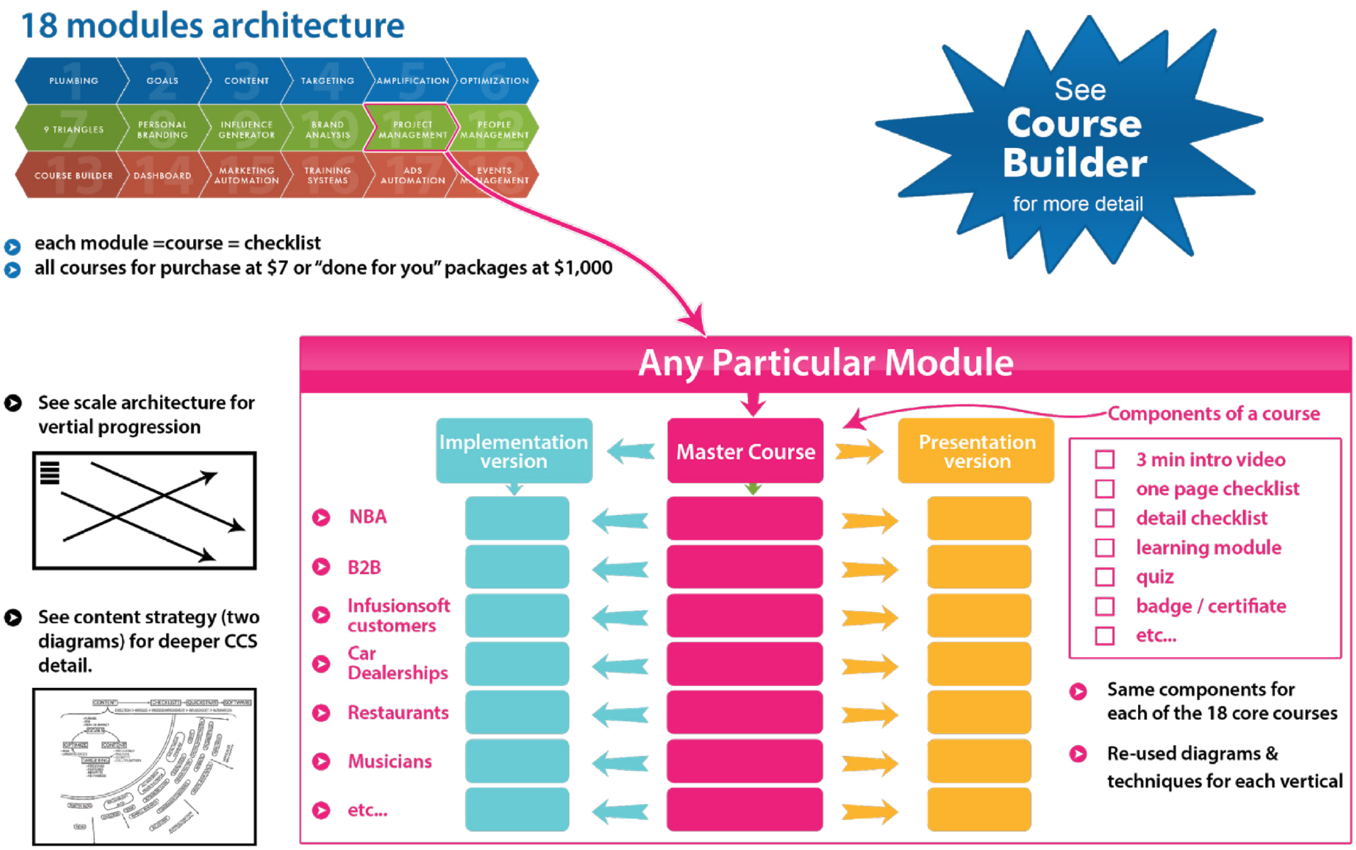
6. That it's S.M.A.R.T.
    - Specific, Measurable, Achievable, Relevant & Time-oriented
    - We define IF/THEN logic where possible. For e
7. We have a short video and accompanying text explanation showing how to accomplish the task, done by someone who has reliably executed this successfully at least times.

8. We have at least 3 others who have executed this successfully 3 times each before it goes beyond this course into our larger process.
9. We understand there are 4 roles involved. For example, only 2 of the 4 roles should see our list of public figures we have listed and only people who have access to the course should be able to see the LightSpeed video.

18 Modules Architecture

We create a presentation version (mainly diagrams, and videos, but less text) and a guide version (the presentation version with detailed text explanations) of each course. Then, people can read the guide by themselves to absorb all the principles. But they might also prefer watching videos or live presentations of us explaining-- thus the presentation version where we speak the words. We create the guide version first.

Let's show page numbers small in the presentation versions, so that we can easily reference pages and so that whoever is presenting has an idea of where they are.



I'd love to have everyone here create little tactical videos of 30 seconds to 3 minutes on anything you think new analysts or clients would trip on, internal or not. Then we can tag these videos with which of the 9 Triangles and where in our 18 box process architecture they fit.

For example:

- How do you find workplace counts (the subject of this thread)?
- How do I create saved audiences?
- What is Boomerang for Gmail and how do I use it?
- How do I log into Basecamp?
- How do I use the Facebook Chrome Pixel Helper?
- What is a carousel ad and how do I make one?
- What are behavioral targets (partner categories, Acxiom, Datalogix, Epsilon)?
- How do I log in to take a quiz?

We have strategic videos of an hour that cover core principles:

- The 9 Triangles.
- Each of the 9 Triangles and how they equip us to solve business problems.
- The 18 box process architecture and how it ties together analysts, businesses, and partners.
- Each of the 18 boxes/checklists.
- What is my WHY and how do I go about clarifying it?

Any content we produce must fit in our system (as tactical, conceptual, or strategic), then with the associated topic. We may have versions of the content as articles, videos, courses (for reading, so high text), and decks (narrated, so low text). We then have quizzes on them (longer content means longer quiz with 10 questions for Micro Courses and 20 questions for Standard Courses) that leads to badges (small, simple achievement) and certification (larger, like a mini-degree).

Training videos can be housed on Soapbox under the access@blitzmetrics.com account. We can then share the link in our 1,000 task library under the proper module.

Anyone can contribute, especially folks like that are teaching others.

We can configure the LMS and dashboard to sit on anyone's site, skinned however we want, with any content that flows well.

Everyone has their own Infusionsoft, landing pages, and other bits, the process and engineering bits augment your content production.

We need to make checklists accountable, so each task must be such that we can determine if it's done to serve 2 purposes:

- To measure how many people go through each task.
- To know where people are stuck and encourage them along.

To determine if something is done, there are 3 ways:

- They check the box (honor system).
- They fill in the blank with some value (quiz or intake form).
- The system determines if the action was completed (most valuable, requiring external API to update contact record).

However, to do it reliably, each task needs to be programmatically verifiable. For example, if they must write 3 blog posts, we can check how many posts they wrote, how many words, etc.

Checklists

The Checklist Architecture is the entire framework built all on something we call the eighteen module checklist architecture.

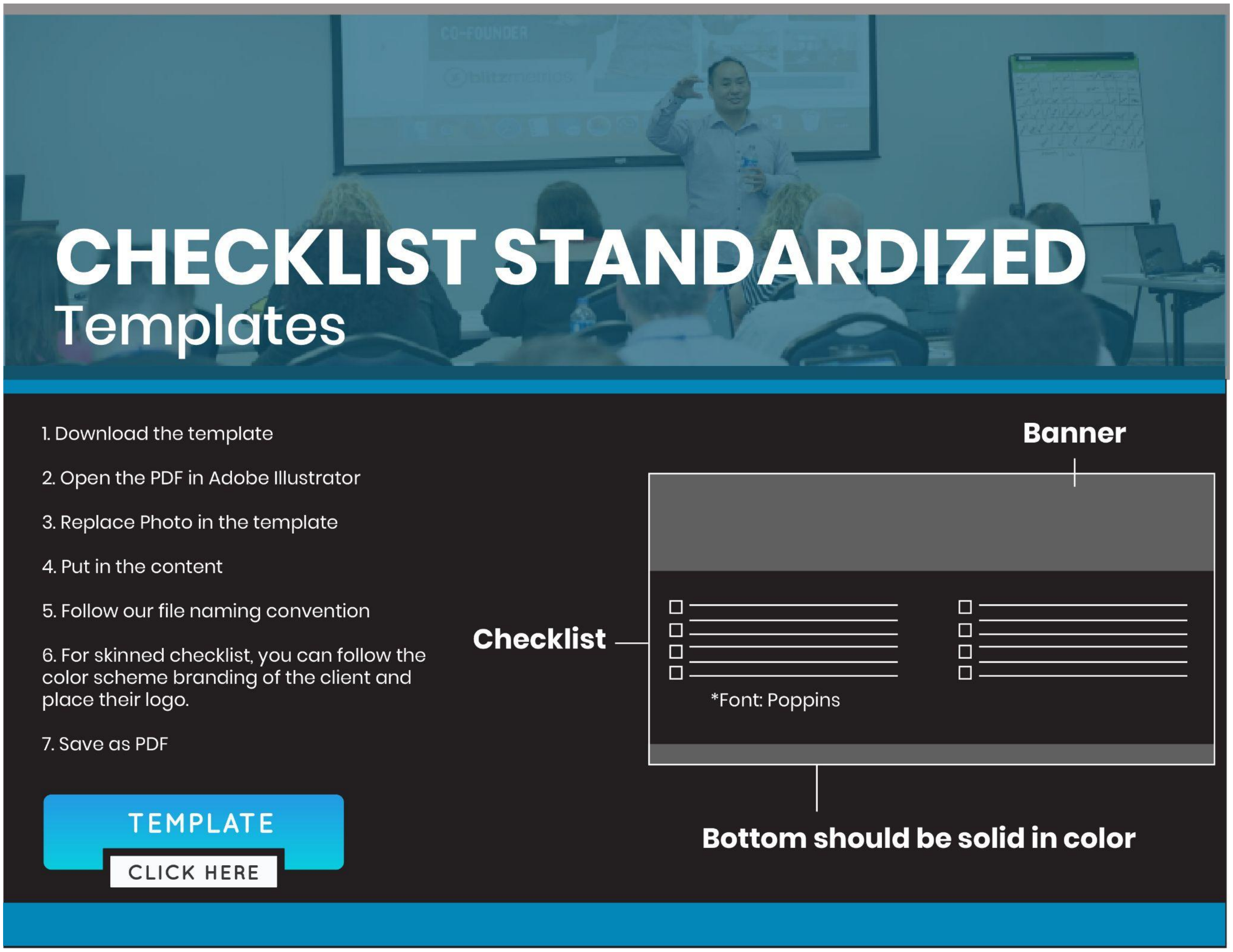
There is a path for specialists and VAs, businesses, who are the people paying the money, and partners, who are aggregators of students and businesses. We know that there are six phases for each of them and therefore there is 18 total.

For businesses, we have the Social Amplification Engine which starts with plumbing, goals, content, targeting Amplification, and Optimization. We know for specialists, that they have to
operate what we call the Digital Marketing Training System.

For partners, we have the nine triangles all the way to running events. Every task in our company has an associated training and cost for them. Each task falls under one of the 18 modules. We like to have training in video and document form.

The Checklist Architecture and the 1,000 task library, which it relies upon hold all of our training.

Click here for all of our checklists in one place:
[Checklist Architecture]



Checklist Standardized Templates

1. Download the template
2. Open the PDF in Adobe Illustrator
3. Replace Photo in the template
4. Put in the content
5. Follow our file naming convention
6. For skinned checklists, you can follow the color scheme branding of the client and place their logo.
7. Save as PDF

[Template]

How To Get Hex Codes of A Logo

1. Go to **[Canva palette generator]** and upload the logo.

2.

Master Guides

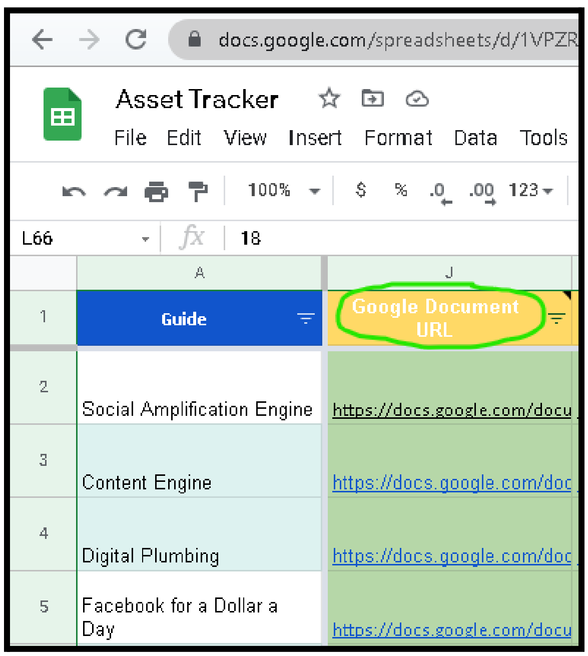
We define the phrase "Master Guide" in 2 senses:
"The" **[Master Guide](#)** — The guide that is the collection of all guides, plus business-level strategy and other higher level topics.
Master Guide or the Google Document version of a Course — "standard" guide on a specific type of discipline in Digital Marketing or module as we define in the 18 Module Architecture.

—These are the guides that appear in the **Asset Tracker**'s Guide Doc Tab.
—Master Guides usually follow the form of:

"Master {Process} Guide"

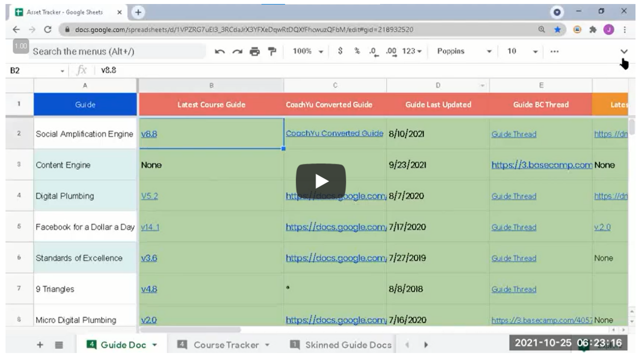
For example:

*"**Master Operations Process Guide**"*
*"**Master Content Marketing Guide**"*



All Master Guides are what we use in order to generate the PDF versions of our courses.

How To Find Where To Recommend Or To Suggest Changes To Any Guide Or Course



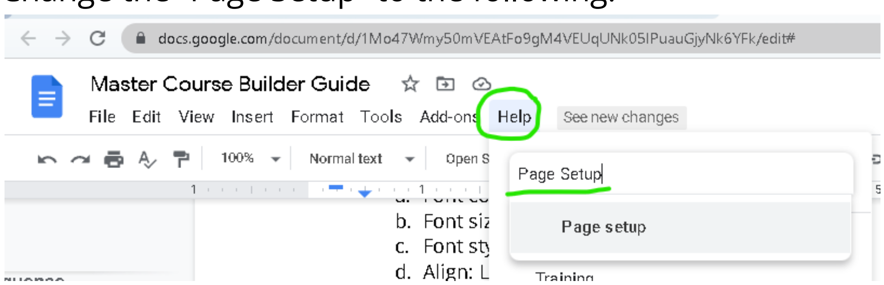
How To Modify A Master Guide

For all modifications to Master Guides, make sure to post the updates in their Basecamp Threads, which you can find in the [Asset Tracker](). Always keep someone who is level 4 or above subscribed in the Basecamp thread. If your level is 3 or below, never use **Editing Mode**, instead use **Suggesting Mode** when you need to make a modification.

How To Create A Google Document For A Master Guide

1. Create a new Google Document.
    a. From your Google Drive, click the **New** button, then select Google Docs to create a new document.
    b. With this new file on your browser, locate and select the *Untitled document* in the upper-left corner.
    c. Rename the document by selecting the dialog box, then hit **Enter**.
2. Select all text (CTRL+A or CMD+A) in the document, then set to the proper settings.:
    a. Font color: black.
    b. Font size: 1 2.
    c. Font style: Open Sans.
    d. Align: Left Align.
    e. Column Options.
        i. Number of columns: 1.
        ii. Spacing (inches): 0.5.

    Some text may be in more than 1 column for a specific purpose, however, the majority of the time, place the text in only 1 column.
3. Change the “Page Setup” to the following:

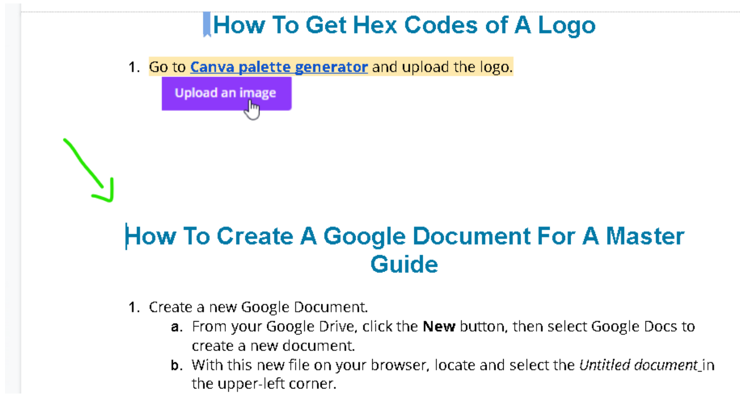


    a. Orientation: Portrait.
    b. Paper Size: 8.5” x 11”.
    c. Page Color: White.
    d. Margin.
        i. Top: 0.75.
        ii. Bottom: 0.25.
        iii. Left: 1.
        iv. Right: 0.25.
4. Change the “Custom line and paragraph spacing” to the following:
    a. Line spacing: 1.
    b. Paragraph spacing (pts).
        i. Before: 0.
        ii. After: 0.
5. Add text to the Google Document.

6. Identify all the headings.

    A heading corresponds to the chapter name of the guide or the module name of an [Academy Course](#).

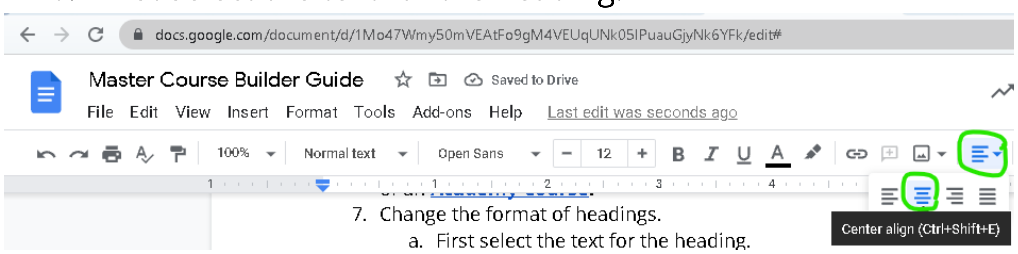
7. Change the format of headings.
    a. Add a page break.



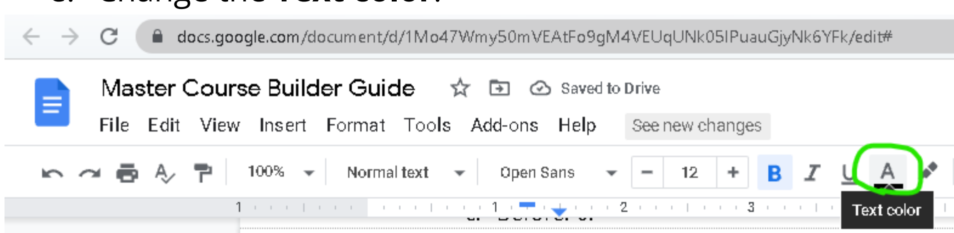
        i. Place the cursor on the left of the first text of the heading.
        ii. Press CTRL+Enter or CMD+Enter.

            This will move the text to the next page. If there is a blank page right before the new page, delete that blank page.

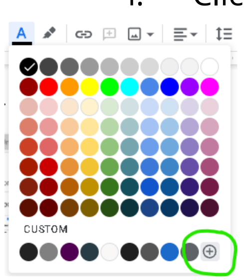
    b. First select the text for the heading.



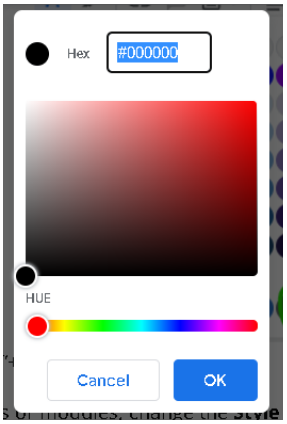
    c. Click **Center align.**
    d. Change the font size to 20.
    e. Change the **Text color**.



        i. Click **Text color**.



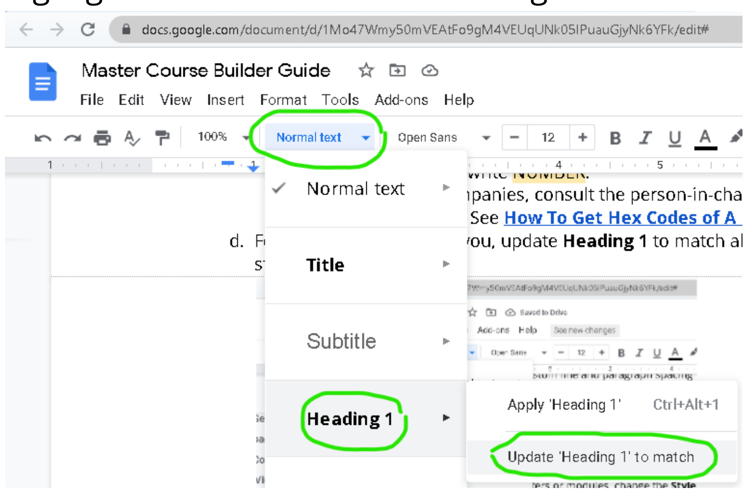
        ii. Click "+" under **Custom.**



iii. Write the hex code for the company brand color in the blank box.
  1. For CoachYu, write **#00ade0**.
  2. For other companies, consult the person-in-charge to determine the hex code. See [How To Get Hex Codes of A Logo](#).

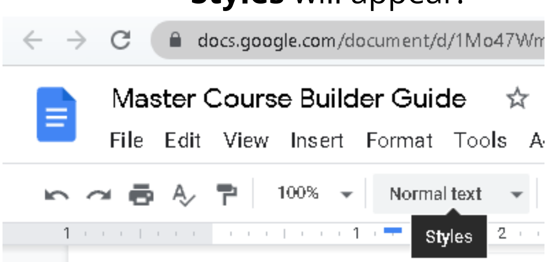
f. For the very first heading you modify, update **Heading 1** to match all other text whose style is **Heading 1**.

  i. Highlight the text of the first heading.



  ii. Click on **Styles**.

The word **Styles** will not appear in the user interface (UI). Most likely, what you will see is the phrase **Normal Text**, while sometimes you may see **Title**, **Subtitle** or **Heading**. If you hover over **Normal text**, **Styles** will appear.



iii. Hover over Heading 1.

Make sure that you do not click **Heading 1**, but rather that you hover over it.

iv. Click **Update 'Heading 1' to match**.

By clicking **Update 'Heading 1' to match**, you have made all past, present and future text whose style was, is, or will be **Heading 1** to have the same format.

g. For each succeeding heading, apply **Heading 1 Style.**

i. First select the text for the heading.

ii. Click on **Styles**.

iii. Hover over Heading 1.

iv. Click **Apply 'Heading 1'**.

8. Identify all subheadings.

A subheading corresponds to the subchapter name of the guide or the lesson name of an **Academy Course**.

9. Change the format of subheadings.

a. Add a page break.

i. Place the cursor on the left of the first text of the heading.

ii. Press CTRL+Enter or CMD+Enter.

This will move the text to the next page. If there is a blank page right before the new page, delete that blank page.

b. First select the text for the subheading.

c. For the very first subheading you modify, update **Heading 2** to match all other text whose style is **Heading 2**.

i. Highlight the text of the first subheading.

ii. Click on **Styles**.

iii. Hover over Heading 2.

iv. Click **Update 'Heading 2' to match**.

By clicking **Update 'Heading 1' to match**, you have made all past, present and future text whose style was, is, or will be **Heading 1** to have the same format.

d. For each succeeding subheading, apply **Heading 2 Style.**

i. First select the text for the subheading.

ii. Click on **Styles**.

iii. Hover over Heading 2.

iv. Click **Apply 'Heading 2'**.

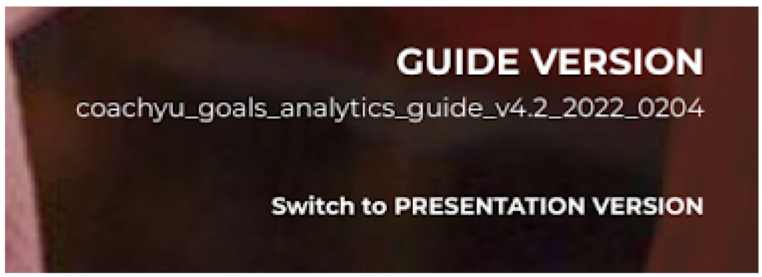
10. Each entry in the Table of Contents appears in the Outline. Each item in the table of contents links to your document headings or subheading.

a. Click **Insert,** then select **Table of contents**.

b. You can structure your document outline to help organize your document. To do this, go to **View,** then select **Show document outline.**

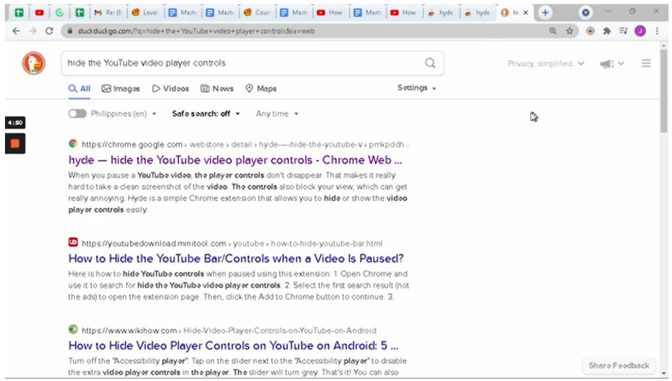
Each entry in the outline is either Heading 1 or Heading 2 in styles. Heading 1 is for chapter/modules, while Heading 2 is for subchapter/lesson.

11. Change the format of the cover page in the lower right.
    a. In the first line, state the version whether it is a Guide Version or a Presentation Version, e.g "GUIDE VERSION" or "PRESENTATION VERSION".
    b. Second line, write the file name and version using the format: "clientname_name_version no._year_monthday", e.g. "coachyu_course_builder_v8.9_2021_0924".
    c. Third line, add a link to switch to either presentation or guide version.



12. Exporting the file
    a. Make sure that the naming convention of the page cover and the file name is alike.
    b. Export as PDF
        i. File > Download > PDF Document
    c. Upload the guide to the corresponding folder under the access@yourcontentfactory.com's My Drive.

How To Add A Video To A Master Guide Google Document



[Add A Video To A Master Guide Google Document]

How To Add New Content To The Pending Process Updates Section Of A Master Guide Google Document

Before you get started, read the **"Master Guide" chapter of the Level 1 Specialist Course**.

The new content that one adds under the **Pending Process Updates** section of any **Master Guide** may contain information, discussion, URLs, files, links, videos, images, etc. This new content is what process developers will use to update, quality assess (QA) and verify the guide's accuracy.

The content is essentially the "To-do List" of that guide for the updates. As long as there is at least 1 Pending Process Update, then we cannot say that the guide is up-to-date. To learn how to implement, update or synthesize new content, see "**How To Synthesize New Information To An Existing Master Guide**"

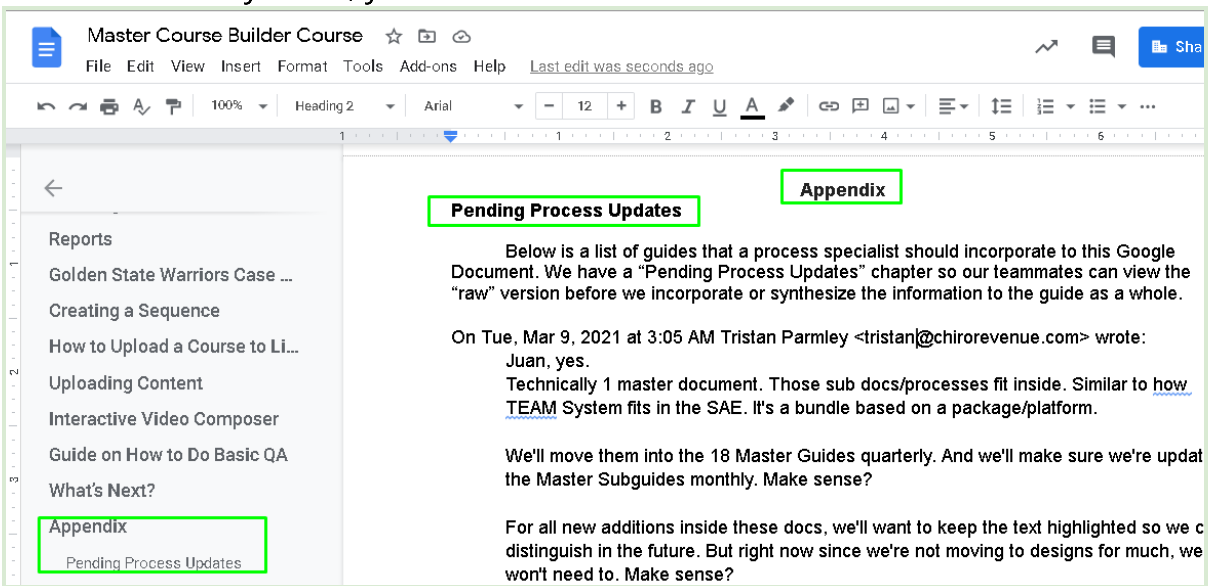
The goals of adding new content under the **Pending Process Updates** section of a **Master Guide** Google Document are the following:

1. To allow the new content to be visible for other team members even if it is in the draft stage, i.e. it is pending.
2. To allow team members to cycle through keywords that appear under the **Pending Process Updates** when the team member uses the search function of (CTRL+F) even if a process developer has not implemented the updates..
3. To allow you or another team member to store new information that a team member can synthesize into the rest of the guide.
4. To allow you to more efficiently manage your inbox.

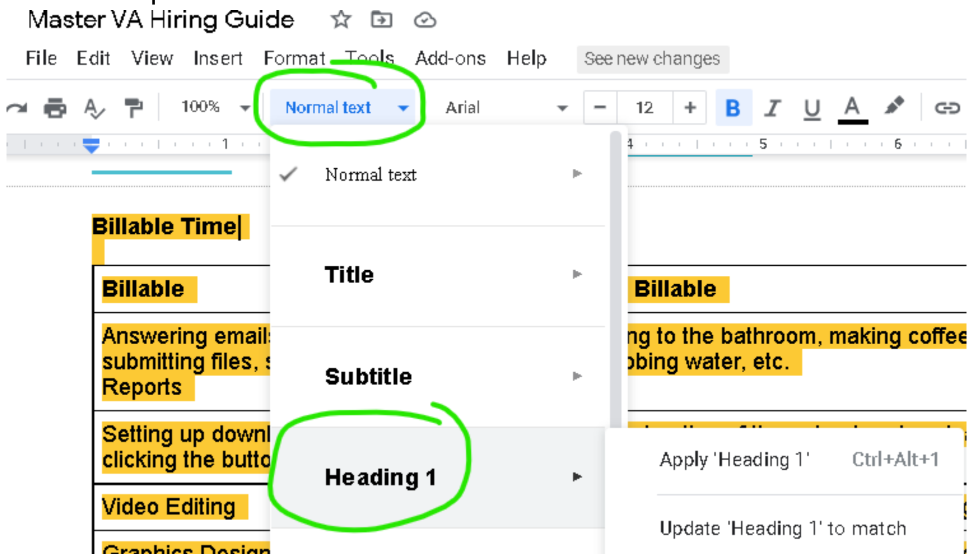
Qualifying Checklist

Execution Checklist

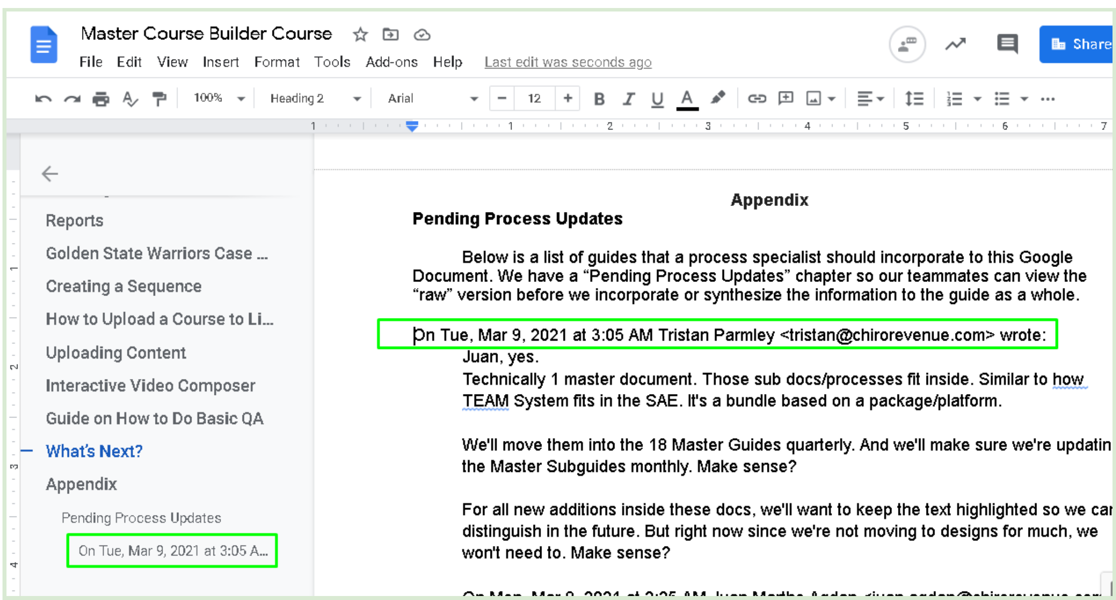
1. Paste the source of the content verbatim that you will synthesize into the guide under the “Pending Process Updates” subchapter of the guide and make sure that there is a subheading in the outline for it.
    • If it’s already there, you don’t need to do this.



2. Add an entry to the outline of the Google Document that acts as a temporary title by adding it as a heading, which contains 1 line of the text that you pasted under “Pending Process Updates”.



• If it’s already there, you don’t need to do this.
• The subject line of the email or the very first line of text suffices.



Verification Checklist

- ☐ The team member used **Editing Mode** to add the new content .
- ☐ The new content is under the **Pending Process Updates** section of **Master Guide** Google Document.

- ☐ There is a page break (CTRL+Enter) between the previous entry and the new entry of **Pending Process Updates** such that the new addition is in its own set of pages.
- ☐ There is a heading for the new content, which uses **Heading 3** as its **Style**.
- ☐ There is an entry in the Google Document's outline, which is under **Pending Process Updates**.
- ☐ IF the new content came by email but not from Basecamp, THEN the new content contains the subject line of the email.
- ☐ IF the new content came from Basecamp, THEN the new content contains the URL to the Basecamp web page.
- ☐ The team member sent a message on the corresponding Basecamp web page for the **Master Guide**.
- ☐ The team member has subscribed Dennis Yu on the corresponding Basecamp web page before sending
- ☐ The team member has subscribed other team members within **#RACI (Responsible, Accountable, Consulted, Informed).**

How To Synthesize New Information To An Existing Master Guide

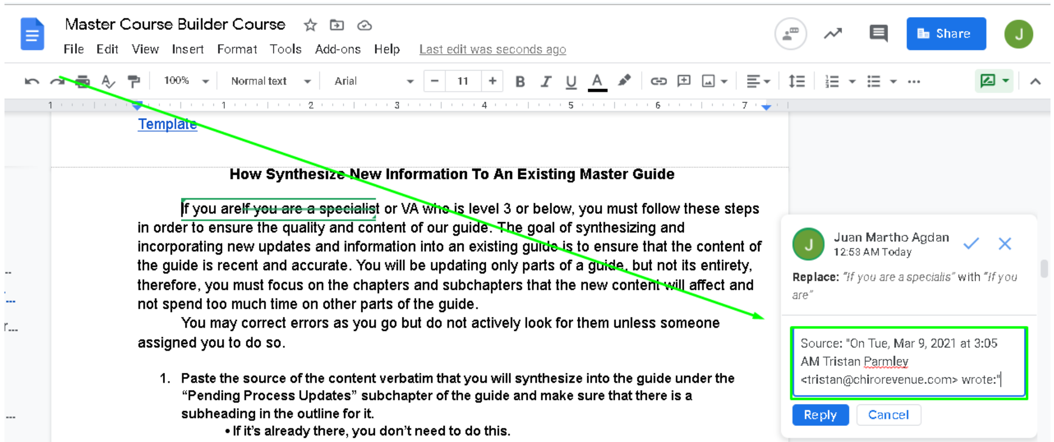
Before you get started, read the [“Master Guide” chapter of the Level 1 Specialist Course]. If you are a specialist or VA who is level 3 or below, you must follow these steps in order to ensure the quality and content of our guide.

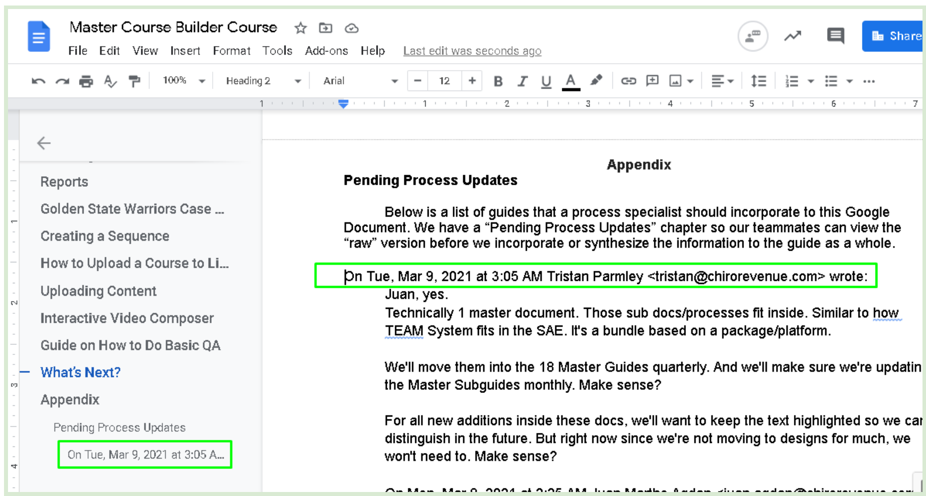
The goal of synthesizing and incorporating new updates and information into an existing guide is to ensure that the content of the guide is recent and accurate. You will be updating only parts of a guide, but not its entirety, therefore, you must focus on the chapters and subchapters that the new content will affect and not spend too much time on other parts of the guide. You may correct errors as you go but do not actively look for them unless someone assigned you to do so.

Note that a “Guide” and a “Presentation” are different from each other. Presentations do not have Google Document versions. Note that QA (quality assurance) is different from updating(process development), which is taking feedback from other team members or outside sources and synthesizing it into a written guide.

For Search Engine Optimization (SEO) there should be no hyperlinks to any site unless they are your own or our clients, partners, or affiliates, e.g., there should be no hyperlinks to google.com, facebook.com, and other such sites.

1. Study the guide you will update in its entirety.
2. Read and understand the content of the update.
3. Identify which chapters and parts of that chapter that you should modify.
4. Turn on the “Suggesting” feature of Google Documents.
   Only level 4 and above team members are allowed to approve suggestions in our guides, therefore you must continue to use the “Suggesting” feature and let someone who is level 4 or above review, and approve.
5. Synthesize or incorporate content into the proper content of the guide.
6. For each suggestion you make, make a comment in the floating window of the Google Document that contains the subheading in the outline of the source of the modification under “Pending Process Updates”.
   - This will come from the “Pending Updates” chapter of the Master Guide you are currently in updating.
   - What you write must be a subheading in the outline.
   - When writing comments, use the syntax: “Source: {Subheading Name}”.
   - Note that contents within the green boxes below contain the same text.



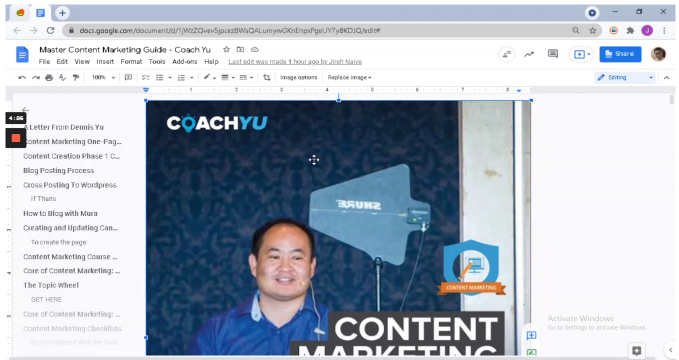


7. On Basecamp, link to the Master Guide and say that you've made suggestions in the Google Document.

• Do not paste the comments and suggestions in Basecamp. You only need to inform team members that you've made suggestions.

How To Fix White Rectangle Glitch On A Google Doc By Modifying The Image And Page Settings

https://www.loom.com/share/8a062f6cfc444a1c95ef67817c0479d9



[How to fix white rectangle glitch on Google doc by modifying the image and page settings](https://www.loom.com/share/8a062f6cfc444a1c95ef67817c0479d9)

Drive Leads and Send Fans Through Email Sequences

Content for emails

This includes any video or text you would like to include. Send out 9 e-mails total.

1. The first e-mail is to present your lead magnet and an introduction of it.
2. Send 3 more emails to nurture them and drive them down the funnel (ACC) towards your trip wire.
3. Send an email giving them the trip wire and introducing it (Self-Conscious course).
4. Send 3 more emails nurturing/driving them towards your Core Offer. NOTE (you can get more sophisticated later on) It's really hard to say what an audience will need (meaning more or less emails, more or less personalized content, etc.) until you start testing.

Place a pop-up box on your website to collect emails.

Deciding pricing for your Tripwire and each offer you'll be selling.

Decide if you want to incorporate any discounts for things such as buying multiple courses, holidays, etc. (This isn't essential, but something to consider).

Create a Memberium membership in order to place all of your courses on your course site.

Placing your courses on your site. Consider if you want to add other options such as Quizzes or Badges to be associated with your course. (Meaning when someone completes the course they get a badge or certification of some type).

Also consider if you want to keep your courses as they are, or chop them into smaller bits. Meaning you could take a 2 hour video and turn it into 4 videos of 30 minutes each. This way even though the content is the same, people feel more like they're "progressing" through a course. You could also have tasks for them to check off in different stages. This is important because you offer multiple courses, you want to consider the "perception" of value. If people feel accomplished after taking one of your courses, they will be more likely to buy multiple courses.

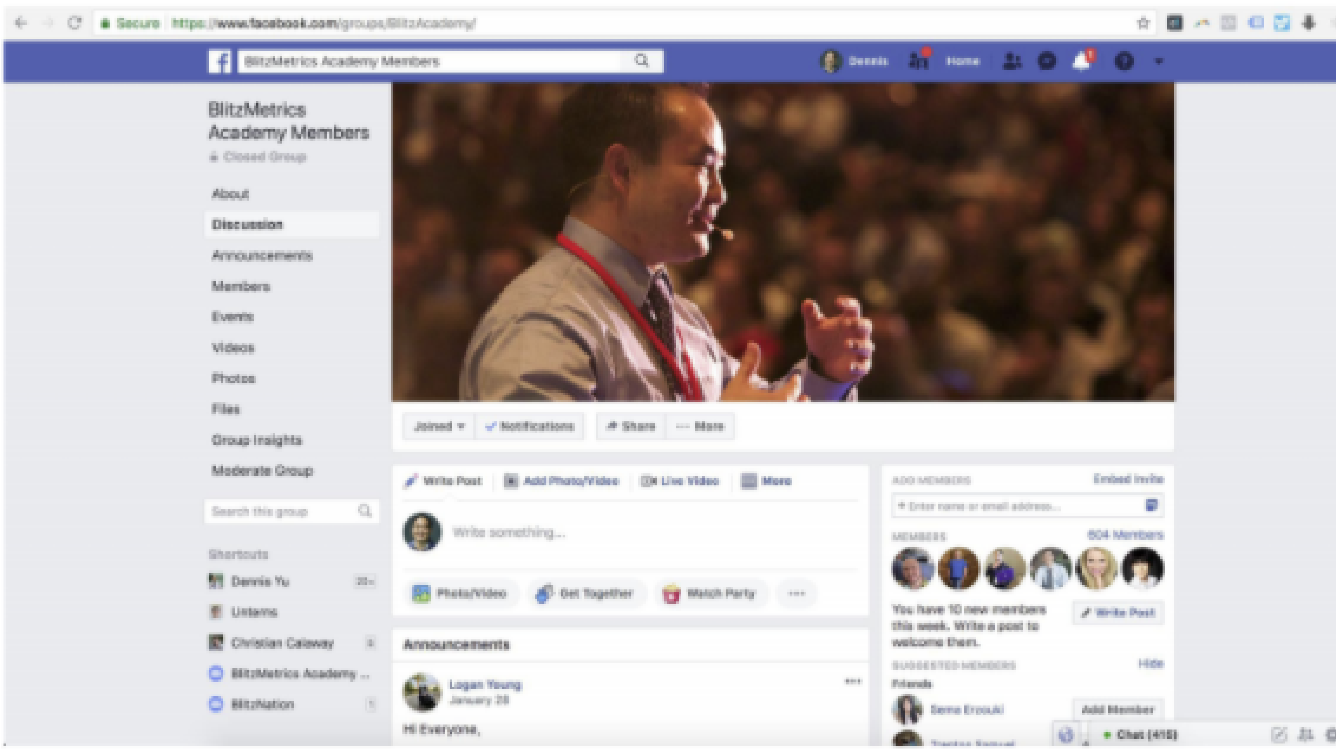
Drive leads on FB as well as send people to your site. Set your starting budget. For us, we start with $50/day on ads, 25 for Lead Ads, and 25 for Video Ads that send people to our site.

You will likely adjust this as you go along.

Create a Private Facebook Group for your Course

Whoever creates a course, create a private Facebook course and add your team members as wanted. Any course that has your logo on it needs at least one person who has experience in the subject as group admins.

Also, create a group for course figureheads. For example, at Content Factory if it's a Content Factory course, we add them to a central private group called "Content Factory Academy Members", so they're a member of two groups.



Course Pre-Sale

Sell a course, even if it isn't done yet.

Most people, believe it or not, sell courses before they've even started building the course-- that's most people, not some of the people.

Same is true for conferences, where they sell tickets even when they don't have an agenda, speakers, or a location ready.

So set up a course as a "pre-sale" (meaning that we don't deliver the course yet, but they can buy it for $497 right now) and include as many details as possible. The same is true when someone pre-orders something online.

It is possible to start a pre-sale up to 3 weeks prior to when the full materials might be ready.

Any earlier and there is a risk of collecting money too far ahead of expectations.

We'll do it for you

Yes, I want you to do it for me.

The first step is for you to get your "plumbing" in place. Get our $147 course for you or a teammate to do it yourself or have us do it for you for $20K for 13 weeks.

For questions, contact: dennis@blitzmetrics.com

We have our [PURCHASABLE GUIDES]() as the master versions of anything we do, detailed enough that any business who is going for DIY (do it yourself) can execute the steps themselves.

Of course, we know once they see the steps, they will choose to have it done for them, which means buying a package. So these guides are educational, yet act as our sales vehicle without overtly selling (this is called inbound marketing). The differences with the internal guides (besides living in Google Docs instead of in these PDFs) is that internal users (our team members):

- Have access to specific systems that we've integrated to help us speed up the work increasingly, because we are trying to automate the whole thing. Of course, businesses who buy a $7 guide don't get access We'll do it for You Course Builder | page 31 to these, except the dashboard for metrics. It wouldn't be helpful to show them our internal access tasks/explanations.
- Task verification and QA of course, we don't provide human support to non-clients. Given that they're not working for us, they don't have to agree to or abide by our standards, like what FancyHands has for their assistants. We can provide automated follow-up in Infusionsoft and the dashboard to nudge non-clients along for the DIY path.
- Payment and job progression to get paid per hour/task based on level, as in our leveling system. This is the analyst track, running parallel to the business track, not what a busy business owner would want to understand nor spend sufficient time to do themselves.
- So it's okay to have PURCHASABLE GUIDES and INTERNAL GUIDES, so long as we understand that the former has step-by-step instructions to accomplish the tasks via systems they have access to without support from us. The internal guides should be built from the purchasable guides, not the other way around. However, if we come across a better way to do things, then we update the purchasable guides.

Any content we have, track in our Content Library (we have a big one for all content, guest posts we made, positive mentions, etc.., that we used to call the Article Library).

Topic: how to use Basecamp messaging.
Notes on where it fits in any sequence: new analyst training, as part of a few videos on how to use Basecamp) which we load into LearnDash for a Level 1 specialist to learn in the first 3 days which Triangle and Checklist this fits into: #CID/#DDD, as part of the operations process guide.

Author: who made this (you, in this case).
Integrated into training, "yes" if loaded into Infusionsoft/LearnDash, "no" if still awaiting.

Have Affiliate Partners Promote Your Course

You can give certain qualified partners (not just anyone) a 50% revshare. Recommended 50% on courses and Subscriptions and 20% on packages.

You want a repeatable process not just for affiliates (generating codes, running reports, paying them each month), but the entire turn-key process to co-promote, create content together (like webinars), nurture the community, collect feedback, upsell to packages, do client love, and so forth.

Dennis Yu (left), Host of CoachYu, and
Frank Cowell (right), CEO of Digitopia

Promoting Your Course

- Publish ungated content (videos, articles, etc.) about topics that are in your course and boost these posts, you can choose to link to a lead magnet in this step.

- Re-target engagement of these pieces of content to another post to deliver a lead magnet or link to your course. (have a few pages of good content to deliver in your lead magnet) You can link to your course at the end of your lead magnet.

- Once you have delivered a lead magnet, have your follow-up sequences in place to encourage people to purchase your course. Whether it be via messenger, email, etc.

Here is our $1 a Day Course.

We should have a lead generation version of each course guide called a QUICK GUIDE. This QUICK GUIDE will be a few page version of the master guide which will be used as a lead magnet.

QUICK GUIDES

A "QUICK" Guide is our execution version of any course-- composed of tasks that a moderately trained (not expert) VAs should be able to reliably do in 15 minutes or less. Thus, a full course will have expert nuances that pros (and our community) know us for. But because we want to have repeatable excellence (work being done mainly by standard VAs and account managers), we have a streamlined implementation package to teach (book, course) and to sell as a package/retainer.

A QUICK GUIDE may be a shorter ebook version of a standard course or a guide.

Purpose: lead generation tool for the course.
Length: 40-50 pages.

Thus, people will get an ebook for free, and eventually they want to get the full course-- which has videos, a guide beyond just the single topic of the QUICK guide, and community access.

We get traction on these lead magnets by putting them in free-ebooks.net under a new section called "Coach Yu".

As long as we track the derivative and related assets in our Asset Tracker, we'll have a powerful machine.

Client Gifts

The clapper is both a gift we can send to partners/clients that we're doing courses with.

Whether they actually use it in a studio or not, it's a great way to commemorate doing any kind of video together.

And it's a great item to buy if you're filming your own courses.

1. It can record film production, director, scene, take, roll and date.
2. Engraved lettering for longevity.
3. Material: wood, quality safe and environmentally-friendly.

   Buy on Amazon: Click Here!

How to Structure Your Course with Video Topics

Once you've built your Topic Wheel with at least 3 topics and 3 people each for you to interview, it's time to seed your Content Library with videos that you create.

Start by listing out questions that you can answer in one minute. 60 seconds isn't long, so choose topics you can properly cover in that timeframe. Avoid being too ambitious by breaking bigger topics into smaller chunks.

Your audience prefers to consume many small tidbits versus sitting through a full hour of you talking, especially 80% of these being consumed on their phones.

I like to use the Notes app on iPhone to keep track of these topics and continue to add, as thoughts pop up. You can use a daily planner or anything that fits with your way of organizing your time.

When you're ready to film, make sure you have a quiet, well-lit location. You don't need fancy equipment, but having a pro set up doesn't hurt. Just don't let an apparent need for pro equipment stop you from producing your videos. Remember, people are watching on their phones, so 4K cameras
aren't necessary.

That said, if you do have a shotgun mic, that yields better sound than your phone's mic. A lapel mic is cheap, too, but wiring a mic up someone's shirt is somewhat unnatural, plus the audience can see the black thing clipped to their shirt, not as personable.

Print out 3 copies of your topic list and send them over to anyone involved, especially if you're filming them. They will appreciate it and will have enough time to think of valuable things to say instead of just winging it.

Have one person holding the camera, balanced on a tripod or perhaps some books, if you need to be creative.

Another person should have the topic list, reading them out to you or whoever you are interviewing.

Shoot in one continuous session, so you can get filming done quickly. We like to have a dozen topics, which should take you 24 minutes. If you're a "one take wonder", your 12 topics will take 12 minutes. If you're like most people, you will need about 2 minutes per topic, enough time to redo a topic, restart midway through a particular answer, or just take a breather to discuss how to answer a question.

The subject should look directly into the camera, not at the interviewer, since these videos simulate quick in-person, face to face mentoring. You're talking directly to your audience, as if they had just asked you this question and you were answering them, one-on-one, like a friend.

The interviewer should ask each question out loud while your camera (or iPhone) is rolling. Then your video editor will know which videos belong with which topic.

If you are interviewing someone else, make sure they know they can always pause and redo when they want. This isn't a live interview so you can edit later to make them sound good, removing the um's and pauses, and keeping just the good parts. Going for 90 seconds to 120 seconds will usually trim

down to a minute.

Let them know they don't need to repeat the question or begin talking immediately. The first 3 seconds are critical to maintaining attention, so we don't want to start with filler. They should start out with a compelling point that entices the viewers to stay around a few seconds longer.

Even though the video editor should be able to figure out what's going on from just the raw footage and topic list, we want to make things fail proof. Some of your team may be virtual assistants who aren't familiar with your topic and/or don't have English as a first language.

Sometimes you'll want to add and adjust topics as you go, so the discipline to state the question before each video snippet is key to being organized. Mark your sheet if you make changes, of course.

Optionally, clap once loudly between each question. This sends an audio spike, making it easier for your editor to find the start and end of each video snippet.

The interviewer or another person (if you're lucky enough to have a 4th person), should be taking pictures and short video clips of your group creating these videos. You'll need these to promote your lead magnet or

course, to get people interested in your bite-sized, one minute training.

We prefer doing this almost entirely within Facebook native posts that sequence to other posts, just like your favorite guilty pleasure Netflix show has seasons and episodes, you could host videos on your site and drive people there.

Most of your videos will be ungated (no login or email required). Though you may want to have one or multiple videos as part of a lead ad designed to collect their email.

You don't have to mention your lead magnet or course yet in the videos, especially if you don't have something to sell.

The beauty is that you can append calls to action later at the end of your videos and even in the body. When you boost the posts that have these videos in them, you're then able to create custom audiences from each particular video. So you could have a sequence where people who watch Video A then get Video B next.

We like to build video remarketing audiences of people who have watched at least 10 seconds, since the default 3 second view is perhaps enough for branding, but not enough for comprehension. If you set the cut-off at 50%, which would be at least 30 seconds of a one minute video, know that you'll probably be dropping 95% of your viewers, unless you are great at maintaining attention.

Most videos get 6 seconds watch time, so that means half of your viewers have bailed even before the 6 second mark. For more on how to maximize watch times, study the 4 components of the one minute video.

Follow the rest of the video editing steps to be able to turn these around in the next few days.

One of my favorite places to quickly crank out a ton of one minute videos quickly is at conferences. It's one of the primary reasons I speak, since being a regular attendee doesn't give you access to the speaker room nor the credibility of being listed in the program.

All the more reason to speak at conferences, since you'll be able to build out your topic wheel with high power authority references, which is more powerful than just you selling or convincing.

To go through the steps to build your Personal Brand to become a more powerful speaker, go through the Personal Branding Course. For more on general video set up, equipment, filming basics, and some fun, check out what our friends at LightSpeed have to say.

Add time-frames to videos

When you have videos, show the length of them. Then sum up the number of videos and total number of minutes.

The Power of Checklists

Watch Dennis Yu Explain the Process!

For every diagram, we want to make sure we have a 3 minute video explaining it, loaded to our LightSpeed account.

Quizzes

Each course must have a set of quizzes that come with a badge after passing. We should have short quizzes after each chapter and a main quiz at the end for a badge or certificate (bigger program).

The goal of the questions is to test that the student has actually listened to the lectures. Questions shouldn't be too easy, but should actually test the user on what they've learned.

Avoid Complicated Vocabulary: Online learners shouldn't have to look up any of the words in your eLearning assessment. This distracts them from the task at hand, which is focusing on the correct answer. Many of the learners might speak English as a second language. Write questions with a simple sentence structure and avoid needlessly difficult vocabulary.

Make sure that your questions do not include answers to other questions.

If an incomplete sentence is used and the student is asked to complete the missing phrase, put the missing information towards the end rather than in the middle of the sentence (this is easier to read for students).

Make sure that the answers for your questions are not easily found by a simple google search. The questions shouldn't be very difficult if the student has listened to all of the lessons. Make sure the questions are on the knowledge that you expect the students to gain, and not just confusing questions on topics that aren't important.

Micro-Courses- 10 Quiz Questions
Standard Courses- 20 Quiz Questions

Landing Page for Courses

Many of us believe we understand what a landing page is-- causing us to skip detailed and helpful notes like this however I implore all of you to study this carefully, so we can roll out proper landing pages, which drive sales.

Most people will come to any one of our articles on a particular topic or term--- thousands of them that we publish on our site or elsewhere as blog posts. Those low-level articles will point to the course page, which then lays out a bigger picture.

For example, we may have a story about how a particular chiropractor used the dollar-a-day technique to get great results-- and in that article link to the dollar-a-day course, which would be ContentFactory.com/FDD.

From that course page, just like the Social Media Examiner Course landing page or VA's Made Easy, below are the components:

- ☐ Details of the course https://www.veggiesmadeeasy.com/va-sop-sales 53504040?el=email he=dennis%40blitzmetrics.com
- ☐ Create urgency
- ☐ Provide samples
- ☐ Focus on the market need (not just features, but benefits)
- ☐ Who it's for ContentFactory .com/FDD
- ☐ The outlines
- ☐ Samples of the materials (video snippets),
- ☐ Feedback from participants (not just testimonials but stories)
- ☐ Link to "do it for me"--perhaps prominently in the top right
- ☐ Buttons- while we have 2-3 buttons spaced down the page (depending on how long the page is) to buy the course. We know that great landing pages that sell courses generally go on for 10-15 screen lengths, so they would have 3-4 buttons along the way to buy the course, then a link at the bottom (not a button) to "I don't want training. Please do it for me".
- ☐ When they go to the course checkout (order form via Spiffy), they see a summary of the key points, the pricing (with discount code box), and other standard bits.
- ☐ If they click on the "do it for me" package, we mention what exactly is included in the implementation package, linking back to the course for more detail. But we also mention criteria for who should get this implementation-- the specific ingredients we need to be successful (mainly GCT) and qualifications (see criteria in the QuickStart Express package, such as in business for at least 3 years, having only one location as a service business, agreeing to be the single point of contact, not being in certain industries, etc). We specify the timeline, which is typically 3 weeks but can be longer if we have a delay in access.

The only packages that don't have significant qualifying criteria is digital plumbing (since that's the first step) and 3x3 video editing (since the output is simply video edits).

The reason we collect so much content so specifically as we teach in the Influence Generator Course and the Course Builder Course is to be able to populate these pages robustly.

Two CTAs we offer on a single page:

- Buy Course
- Have us do it for you

Example:

Our current setup:https://blitzmetrics.com/fdd/ PARENT with two CTAs

1. Course - INFS Checkout Page [no spiffy yet]
2. Do it for you - INFS Checkout Page [no spiffy yet]

Landing Page Checklist

- ☐ Use the correct version of the website's logo (coach-yu.com uses the Coach Yu Logo, ContentFactory.com uses the Content Factory logo, etc.)
- ☐ Always clearly show the price.
- ☐ Have a 3-4 minute explanatory video. Embed public videos (landing pages and blogs) using Facebook or YouTube. For webinars, we can make the trailer -- the 5 minute highlight summary to be on the landing page. LightSpeed VT
- ☐ Clearly state who this is for and not, what we do and don't do (for package landing pages), why they should buy it (we have to show them what they're getting-- not just a few bullet points; provide actual examples)
- ☐ Show a one-pager checklist for each package we're implementing and in the underlying courses for each package.
- ☐ Include the key diagram.
- ☐ Show an Image of the deliverable or even multiple examples.
- ☐ Place multiple testimonials on the landing page.
    - Include at least 3 raving reviews.
    - Have at least 6 testimonials on every landing page-- more is better.
    - In the CoachYuContent Library, we have hundreds of testimonials in many formats (video, audio, text, links, tweets, etc) that we can use specifically (for one product) and generally (for any product).
    - For testimonials, let's call this section " Social Proof".
- ☐ Watch for weird formatting and highlighting. Look at it on mobile.
- ☐ Make sure to put a CTA checkout button that links to the shopping cart/order form.
- ☐ For product landing pages (when we're selling anything), let's make sure we have an image, show the author, and insert " show notes" (not just a summary of key points, but showing why this training is valuable to them, who it's for, etc.). When we have versions of the product, explain in their respective landing pages what each version is.
- ☐ For webinars, make sure you say when it is and put in a countdown timer. When we have rich descriptions on our webinar landing pages (show notes, not transcriptions), our SEO and sales will start to improve.
- ☐ When showing package options ,best practice for these "good/better/best" landing pages is to have each option say it includes the Let's not put the name of the landing page as the title of the page.items from the lower campaign.
- ☐ Let's not put the name of the landing page as the title of the page.
- ☐ Landing pages usually convert better when we don't have a topnav (like what most home pages have). Test various components like what videos, what images, what copy performs best, too-- standard stuff.

Webpage Creation for Job Posts

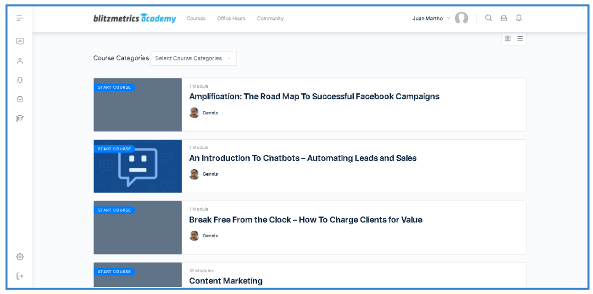
We want to have a general VA Welcome page, as well as one for each country (Philippines, Pakistan, Kosovo) just like our skinned guides. We use more examples, stories, and diagrams specific to that partner/country.

So build out these 3 country versions, which start as copies of the master-- then add in tons of examples that are specific to that version and we can include the best examples in the master version.

For example, I have a lot of content with Rehan Allawala and Pakistan in general-- check out my Facebook profile. And especially our Facebook group. Pull in Sammy Khan, who is our community manager for Pakistani VAs.

LearnDash Learning Management System (LMS)

Courses are the backbone of any learning curriculum. This section will break down everything you need to learn aboutLearnDash courses—customize settings, add content, control access and more.



[Content Factory Academy Basics]

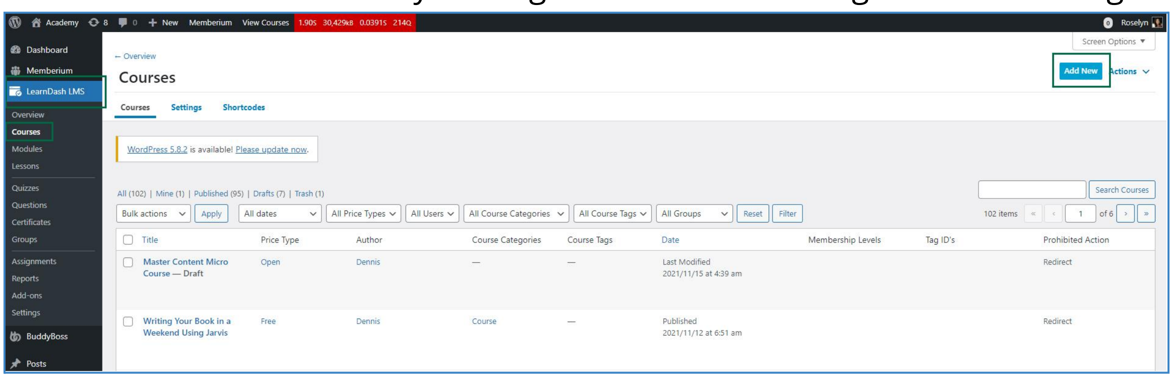
How To Create A Course In The Content Factory Academy Using LearnDash

Qualifying Checklist

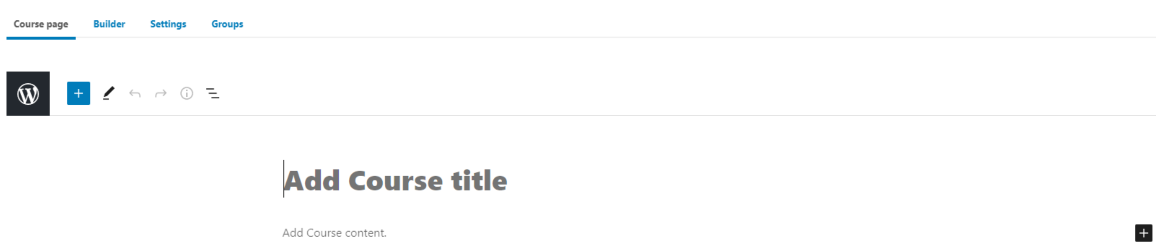
- ☐ Admin access to academy.yourcontentfactory.com/wp-admin/.
- ☐ Course content in the form of text or videos.
- ☐ Course quizzes.
- ☐ Featured Image.

Execution Checklist

1. Log in to academy.yourcontentfactory.com/wp-admin/.
2. Navigate to Course Builder.
    2.1. Click **LearnDash LMS**.
    2.2. Go to Courses.
    2.3. Create a new course by clicking Add New or hovering over the existing course.



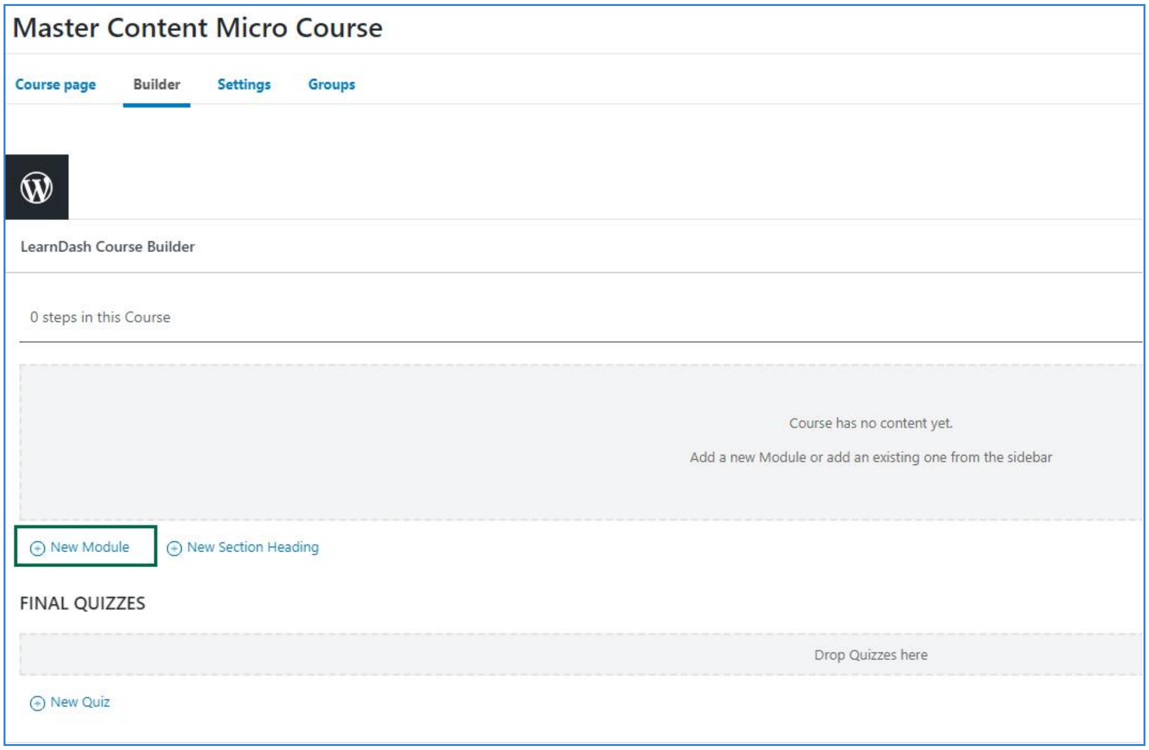
    2.4. Add or type the Course Title



    2.5. Click the "Builder" Section to add modules and lessons.
3. Add **Modules**.

    Sections are simple, text-only headings that can be used to break your course content into sections. They can only be added at the top-level within a course. In other words, sections must be placed before (and outside of) lessons. Within the course builder (below any lessons or topics you have already added):

    3.1. Click the + New Module .



3.2. Type the title of the module.

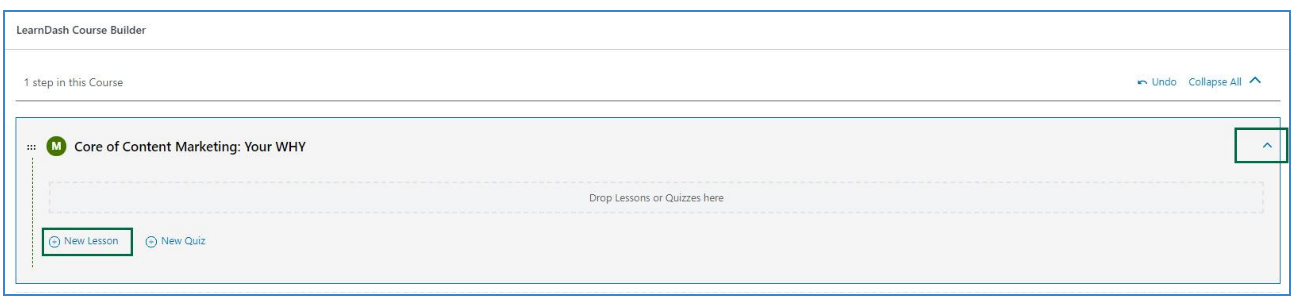
3.3. Hit Enter, or click the Add Module button.

4. Add **Lessons**.

Lessons are a place for you to start building out your actual course material. You can include text, images, video, audio, PDFs, and virtually any other type of third-party or embeddable content.

4.1 Hover on the dropdown option of the module.

4.2 Click the + New Lesson.



4.3 Enter the title of the lesson.

4.4 Click the Add Lesson button.

5. Add **Topics**.

Topics are like lessons, you can add many different types of course material to your topics—text, images, video, PDFs, presentation slides, and more. Topics are usually used in creating even more hierarchy in your course.

6. Add Course Page Content.

The course page content area is where you add a course title, description, and featured image for your course. This is what people will see before they enroll (or purchase) the course.

LearnDash will automatically add a course content table with a list of lessons, topics & quizzes associated with the course below your course description. The course page content is your own custom information that will be displayed as soon as the page is loaded, immediately underneath the “Course” tab.

6.1. Navigate to LEARNDASH LMS > COURSES.
6.2. Click on the course you’d like to edit.
6.3. You will automatically land on the Course page tab.
6.4. You can immediately start adding your course description.

7. Add the Course Title.

   Your course title is the first thing you’ll see at the top of the editing screen. Look for a placeholder that says “Add Course title.”

   Most themes display the course title near the top of the page, below your header and/or global navigation. When you click inside of the “Add Course title” box, you’ll see an area appear above, labeled “Permalink.” This is your course URL. In most cases, this should be a reflection of your course title.

   7.1. Click into the “Title” area, as if you were going to change your course title.
   7.2. Click the “Edit” button next to the permalink.
   7.3. Type your new permalink.
   7.4. Hit Enter, or click the Save button.

8. Add Course Description.

   Everything below the course title is a blank canvas for you to add your description. This is powered by the same WordPress editor used for pages, blog posts and other content types in WordPress.

9. Add the featured image.

   The featured image is the main image associated with your course. Most WordPress themes will display this image near the top of your course page. It’s also the image we’ll display if you’re using the course grid add-on.

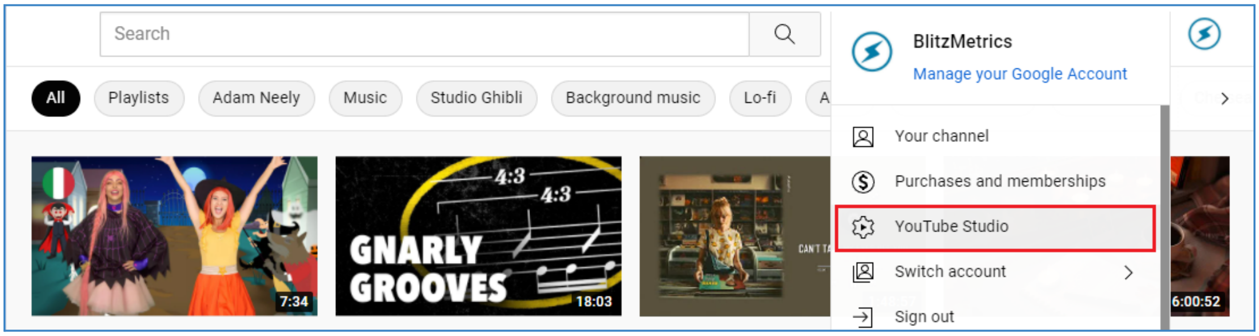
   9.1. Look for the Featured Image panel in the sidebar (make sure you’re viewing Document settings, not Block settings).
   9.2. If it’s not already open, click on it to open it.
   9.3. Click Set featured image.
   9.4. Choose an image from your Media Library, or upload a new one.
   9.5. Click the Select button at the bottom.

10. Add Quizzes.

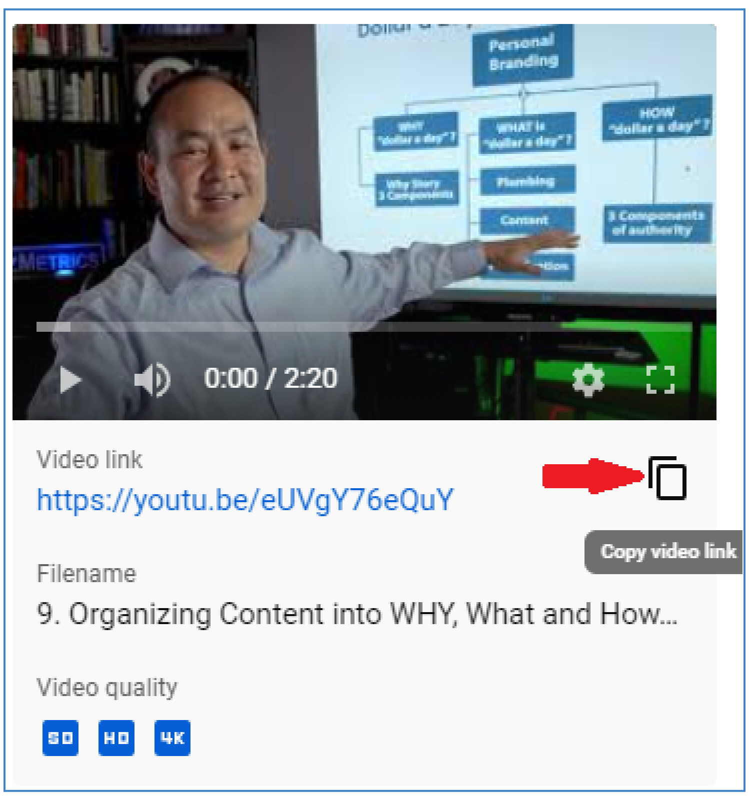
   Quizzes provide a way for you to measure a user’s comprehension of the learning material in your course. LearnDash quizzes come with quite a few options to customize the experience. This section will cover all of those options in detail.

The LearnDash quiz builder provides a quick, intuitive way to add, edit, move & delete all the questions in your quiz. This article explains how to use every aspect of the quiz builder to make creating quizzes & managing questions a breeze.

11. Upload and Embed Videos.
    11.1. From the [YouTube](https://www.youtube.com) homepage, click the Content Factory icon on the top right corner then select YouTube Studio

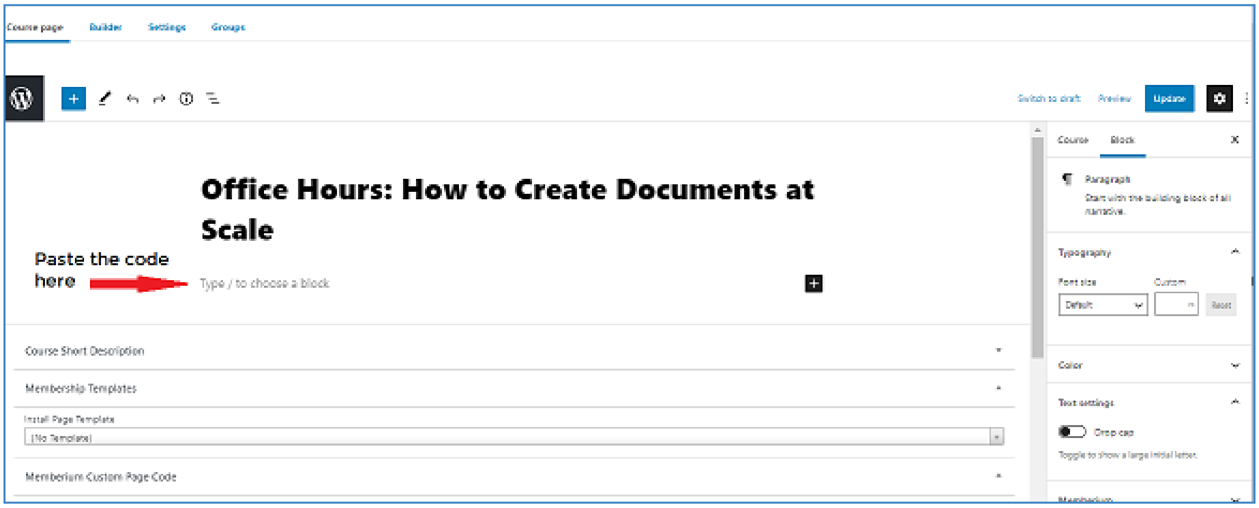


    11.2. Click the Upload button and select the file that you want to upload.
    11.3. Make sure to name the file properly and set it as “Unlisted” videos.
    11.4. Go to the Video Details and copy the video link by clicking the icon.



    11.5. Open the WordPress Dashboard on the other tab, click LearnDash LMS, and search for the course that you want to insert the video.

11.6. Click Edit, and embed the video by pasting the YouTube link inside the course content. Make sure you're in the right module or lesson when you apply this.



How To Obtain An Academy Course's Public Link

Video Guide: How to Find the Public Link
For example, https://academy.yourcontentfactory.com/courses/seo-101-mini-course

Office Hours MICRO Course One-Pager Checklist

- ❑ Download The RAW Video from Zoom
- ❑ Upload The RAW Video To Wistia Guide
- ❑ Upload The RAW Video To YouTube
- ❑ Transcribe The Video Guide
- ❑ Take Out Timestamps And Blog Post Ideas
- ❑ Write Social Media Copy For Video Snippets
- ❑ Write Copy For The Landing Page
- ❑ Write Blog Posts Guide
- ❑ Crosspost Blog Posts Guide1 Guide2 Guide3 Guide 4
- ❑ Video Edit The Office Hours Episode Guide
- ❑ Create A Featured Image
- ❑ Create A MICRO Course In The Academy
- ❑ Create/Publish A Landing Page
- ❑ Make A Product In Keap
- ❑ Make An Order Form In Keap
- ❑ Make Course Tags In Keap And Add Them To The Academy
- ❑ Create A Fulfillment Campaign In Keap
- ❑ Video Edit A 1-minute Video HOOK
- ❑ Video Edit A 1-minute Video PROMO
- ❑ Video Edit A 1-minute Video VALUE
- ❑ Boost All 1-minute Videos On Facebook
- ❑ Create Public Web Pages For Jargon
- ❑ Collect Positive Mentions

How To Transcribe A Video

Put the recording through our transcription software and take out the transcript. Copy it and place it in a Google Doc inside the folder where the recording is. When done, add the link as a comment in this thread.

RECORDING: LINK

How To Take Out Timestamps And Blog Post Ideas

Go through the recording and take out timestamps for video snippets. Add a title for each snippet that needs to be edited.

Target: 3-4 OMVs + 3-4 short videos (2 to 5 minutes) -> from a 1-hour recording.

Also, write 1 or 2 blog post ideas with a short outline (if necessary).

How To Write Social Media Copy For Video Snippets

Write social media copy to be used with the OMVs and the Short Videos. Make sure the copy is compliant with the social platforms and it's not too salesy. The goal is to teach and entertain, not push sales down the audience's throats.

Always include some kind of Call-To-Action.

How To Write Copy For A Landing Page

Each Long-Form Video should have its own Landing Page. Write the Copy according to the goal of the recording.

At the end of the Landing Page, write a section with a CTA that takes people to one of the main courses, or to Office Hours.

How To Write A Blog Post

Use the recording and the transcript to write blog posts about the topics found below. Use Jesper to create a Perfect Headline (Always offer 4-5 Headline alternatives with each Blog Post you write), and to develop the content to a minimum of 500 words.

TOPICS: LINK

RECORDING: LINK

TRANSCRIPT: LINK

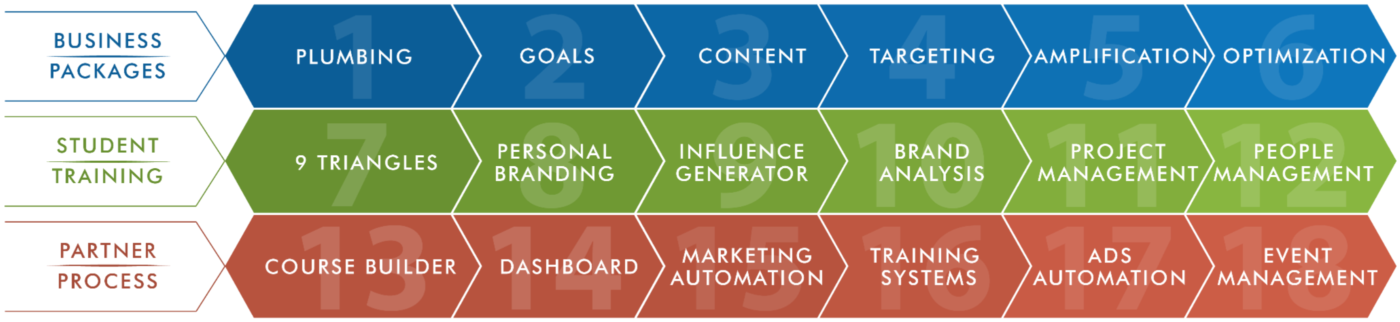
How To Crosspost A Blog Post

Follow the Content Calendar and Publish content at the specified time, on the specified platforms.

Take the blog post below and publish it on the WEBSITE.

How To Create A Featured Image For An Office Hours Episode

1. Identify the module number that the Office Hours Episode belongs in from 1 to 18.



   The module number will be a number from 1 to 18. If you're not able to identify the correct module number, consult the project lead or your team lead.

   Alternatively, go to the Asset Tracker's Course Tracker tab and view if there the Module # column has a number. Note: The Asset Tracker is not a public file and only internal Content Factory team members can view the Asset Tracker.

2. Create a duplicate of the corresponding Powerpoint file in Office Hours Covers - PowerPoint based on the module number.
   Move the file to the correct Google Drive folder.
3. Rename the file using the syntax "[Office Hours Episode] featured image" without quotation marks.
   - E.g. An inside look at conquering local business and project Management featured image.
4. Place the file in Office Hours Featured Images.
5. Rename the file "[OfficeHoursName] Featured Image".
   E.g. Office Hours: Why Books Build Authority And How AI Can Help Featured Image
6. Insert a text box at the right side and write the name of the Office Hours episode.
   e.g. https://docs.google.com/presentation/d/1fTR7XvtHCjK8QYKfztVDD-4bNtN1P__4/edit#slide=id.p1
7. Use font size "144", font style"Oswald", and left align.
8. In the Asset Tracker's Course Tracker tab, place the URL under the "Featured Image" column.
9. Download the file as a PNG.
10. Upload the image to the Academy as a featured image.

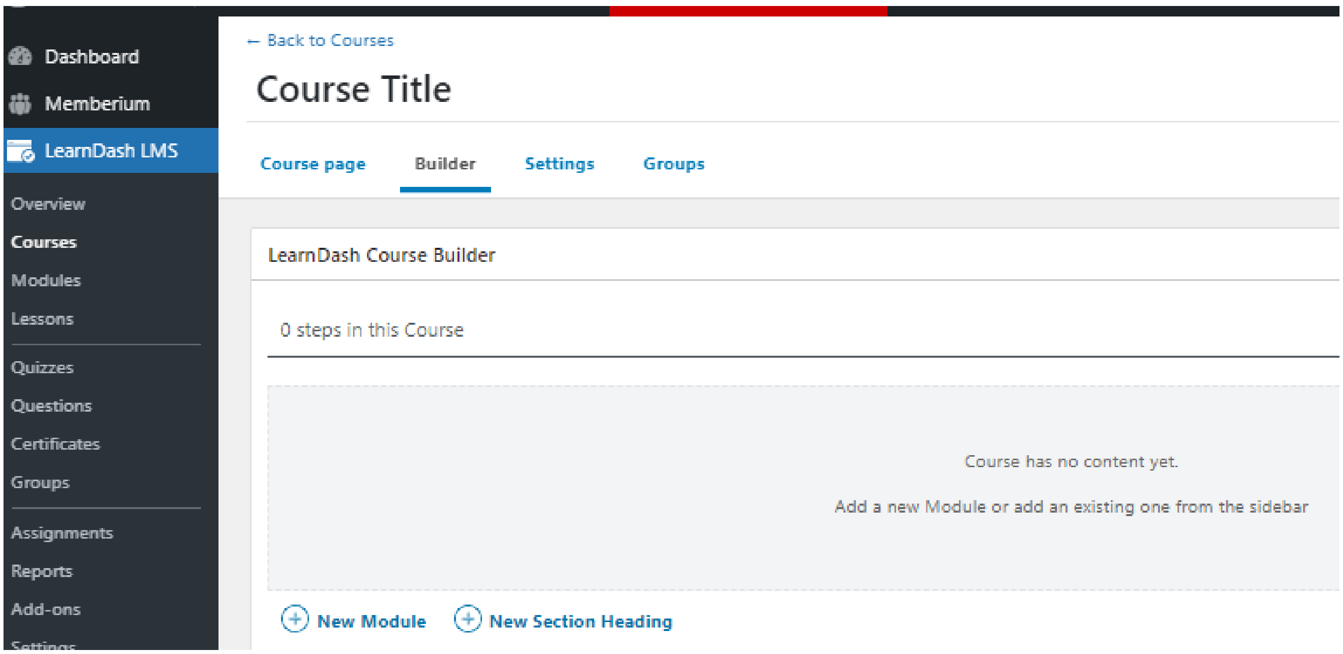
How To Create A MICRO Course For An Office Hours Episode In The Academy

Qualifying Checklist

☐ Admin access to academy.yourcontentfactory.com/wp-admin/.
☐ Office Hours episode recording.
☐ Featured Image.
☐ Upload Access to the Content Factory Wistia account.

Execution Checklist

1. Upload the Office Hours episode to Wistia.
2. Navigate to Academy’s Course Builder.
    2.1. Log in to academy.yourContentFactory.com/wp-admin/.
    2.2. Click LearnDash LMS.



    2.3. Create a new course or hover on the existing course.
    2.4. Click the “Builder” Section.
3. Add 1 **Section**.
    3.1. Click the + New Section Heading link.
    3.2. Type the name of your heading.
    3.3. Hit Enter, or click the Add Section Heading button
    3.4. Name the **Section** using the syntax ““[Video Name]” Video”.
    E.g. *"Why Books Build Authority And How AI Can Help" Video*
4. Embed the Office Hours episode from Wistia in the section.
5. Add Course Page Content.
    The course page content area is where you add a course title, description and featured image for your course. This is what people will see before they enroll (or

purchase) the course.

Course page content is your own custom information that will be displayed as soon as the page is loaded, immediately underneath the “Course” tab.

5.1. Navigate to LEARNDASH LMS > COURSES.
5.2. Click on the course you’d like to edit.
5.3. You will automatically land on the Course page tab.
5.4. You can immediately start adding your course description.

6. Add the Course Title.

Your course title is the first thing you’ll see at the top of the editing screen. Look for a placeholder that says “Add Course title.”

Most themes display the course title near the top of the page, below your header and/or global navigation. When you click inside of the “Add Course title” box, you’ll see an area appear above, labeled “Permalink.” This is your course URL. In most cases, this should be a reflection of your course title.

6.1. Click into the “Title” area, as if you were going to change your course title.
6.2. Click the “Edit” button next to the permalink.
6.3. Type your new permalink.
6.4. Hit Enter, or click the Save button.

7. Add Course Description.

Everything below the course title is a blank canvas for you to add your description. This is powered by the same WordPress editor used for pages, blog posts and other content types in WordPress.

8. Add the featured image.

The featured image is the main image associated with your course. Most WordPress themes will display this image near the top of your course page. It’s also the image we’ll display if you’re using the course grid add-on.

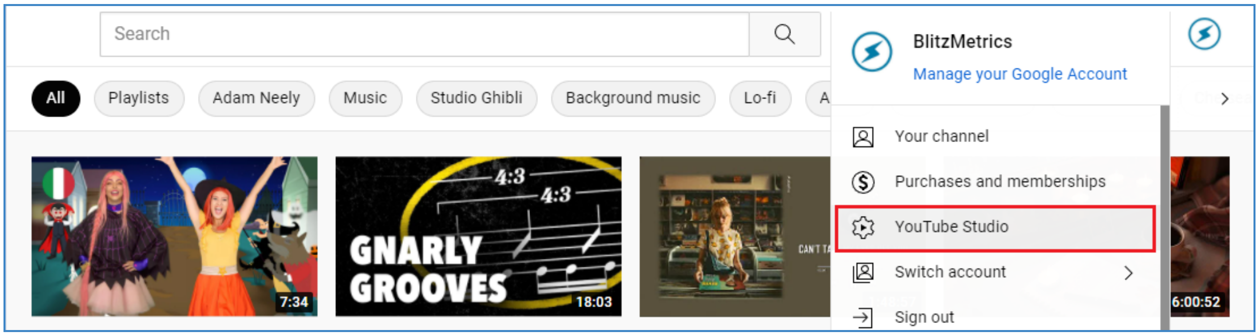
8.1. Look for the Featured Image panel in the sidebar (make sure you’re viewing Document settings, not Block settings).
8.2. If it’s not already open, click on it to open it.
8.3. Click Set featured image.
8.4. Choose an image from your Media Library, or upload a new one.
8.5. Click the Select button at the bottom.

9. Add Quizzes.

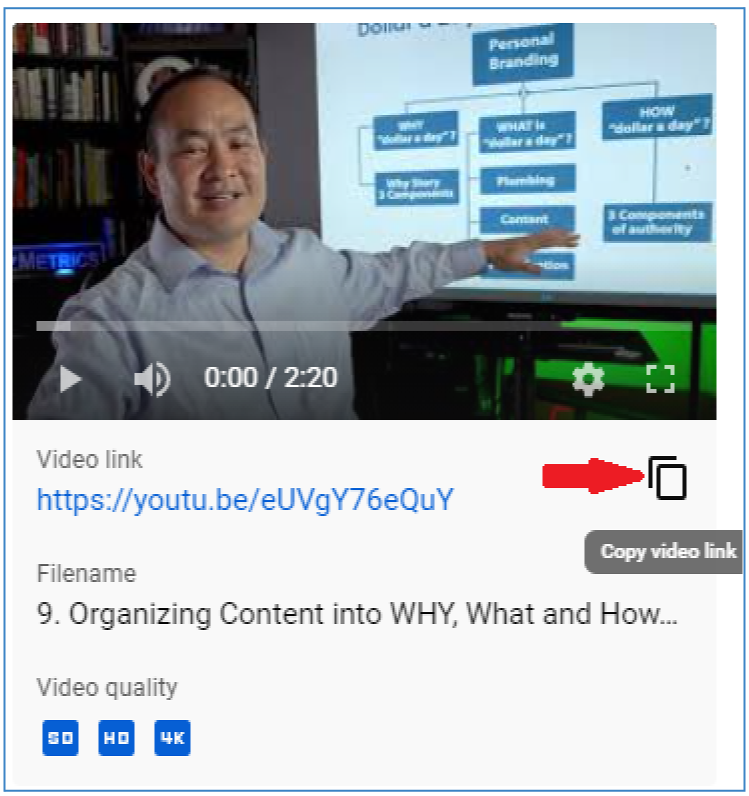
Quizzes provide a way for you to measure a user’s comprehension of the learning material in your course. LearnDash quizzes come with quite a few options to customize the experience. This section will cover all of those options in detail.

The LearnDash quiz builder provides a quick, intuitive way to add, edit, move & delete all the questions in your quiz. This article explains how to use every aspect of the quiz builder to make creating quizzes & managing questions a breeze.

10. Upload and Embed Videos.
    10.1. From the [YouTube](#) homepage, click the Content Factory icon on the top right corner then select YouTube Studio

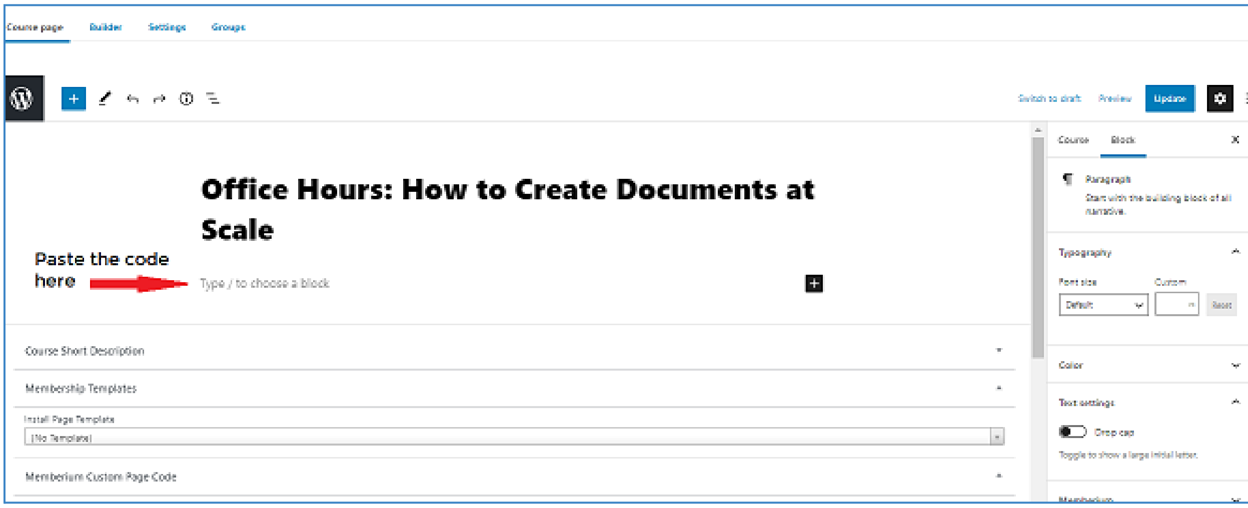


    10.2. Click the Upload button and select the file that you want to upload.
    10.3. Make sure to name the file properly and set it as "Unlisted" videos.
    10.4. Go to the Video Details and copy the video link by clicking the icon.



    10.5. Open the WordPress Dashboard on the other tab, click LearnDash LMS, and search for the course that you want to insert the video.

10.6. Click Edit, and embed the video by pasting the Youtube link inside the course content. Make sure you're in the right module or lesson when you apply this.



11. Update the Asset Tracker's Course Tracker tab.

How To Video Edit An Office Hours Episode

Edit the full recording according to the Video Editing Guide. If this is a CoachYu show episode, use the appropriate branding assets and colors.

Take out empty space and all the errors you can find. Also, if the sound is not good enough, enhance it.

How To Create/Publish A Landing Page

Take the Copy +Wireframe found below and create the Landing Page for the recording.

COPY/WIREFRAME: LINK

How To Video Edit A 1-minute Video HOOK

Take the timestamps below and edit them according to the Video Editing Guide. Make sure to use the appropriate branding assets and colors.

Take out empty space and all the errors you can find. Also, if the sound is not good enough, enhance it.

TIMESTAMPS:

How To Video Edit A 1-minute Video PROMO

Take the timestamps below and edit them according to the Video Editing Guide. Make sure to use the appropriate branding assets and colors.

Take out empty space and all the errors you can find. Also, if the sound is not good enough, enhance it.

TIMESTAMPS:

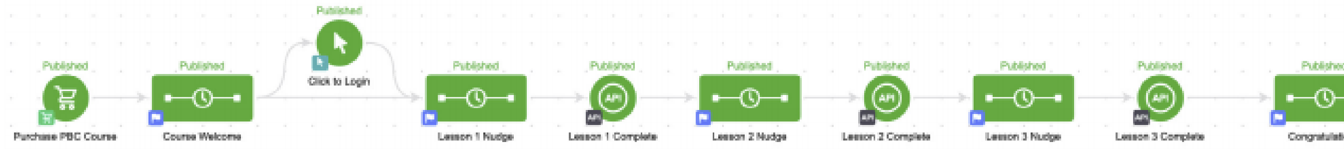
How To Video Edit A 1-minute Video VALUE

Take the timestamps below and edit them according to the Video Editing Guide. Make sure to use the appropriate branding assets and colors.

Take out empty space and all the errors you can find. Also, if the sound is not good enough, enhance it.

TIMESTAMPS:

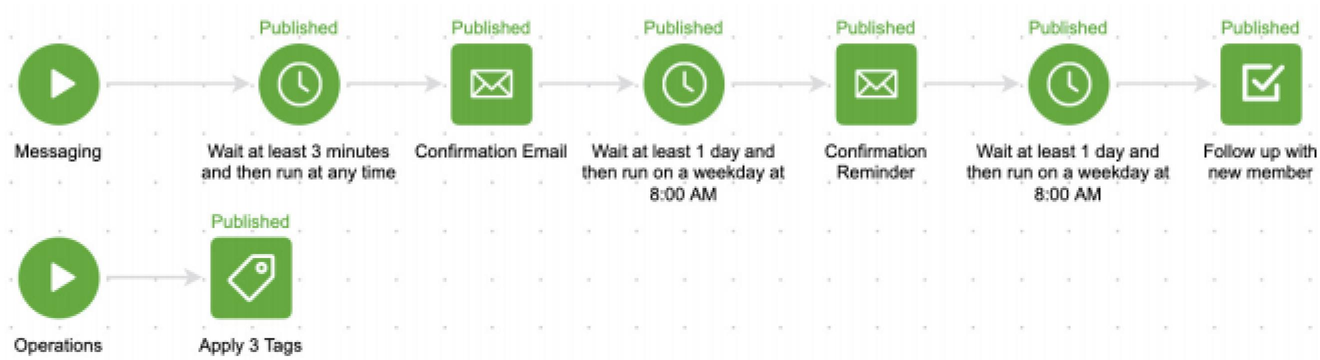
Course Fulfillment



These are our campaign goals for our Personal Branding Course fulfillment at the campaign level. Notice that our campaign does not end at delivering the course, but instead ends when our members actually complete our course.

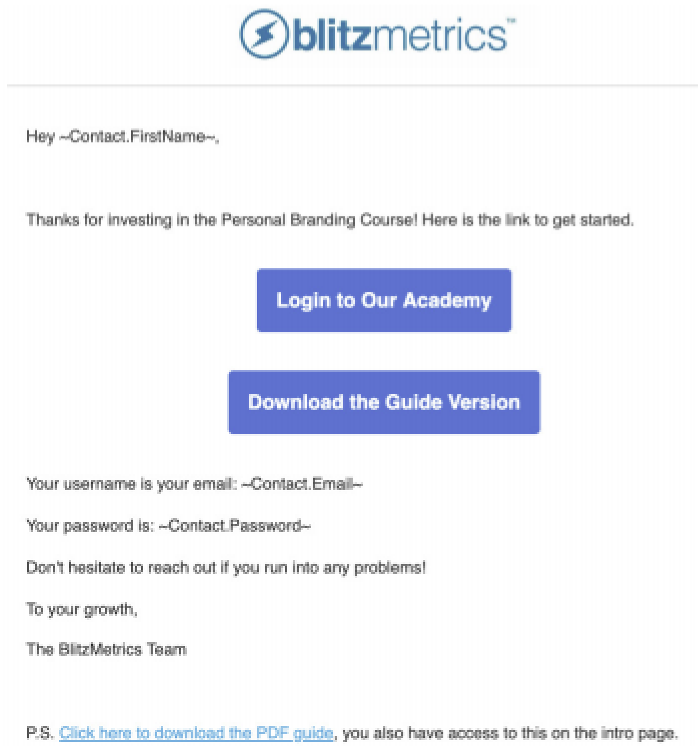
Our campaign goals (run action triggers) are strategic in holding our members accountable to their goal.

Our campaign starts when someone purchases our course; Product Purchase goal. That goal then triggers our course confirmation and welcome sequence; to create the members' login credentials to our academy (see advanced setup):



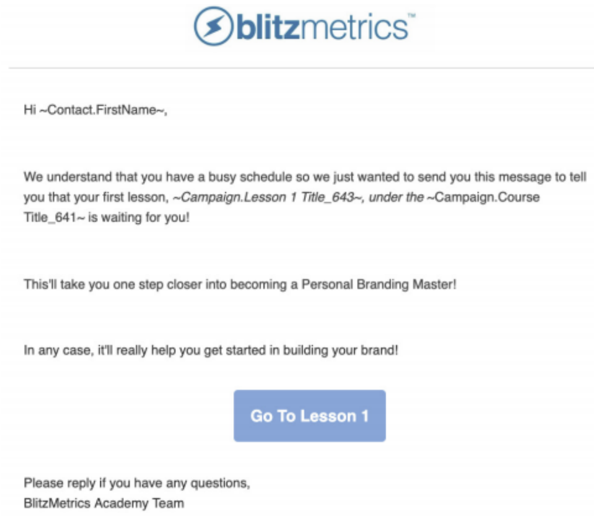
In our confirmation and welcome sequence, our goals are to notify our new member that their purchase is successful, giving them access to the course, and extending our invitation to receive support if they run into problems, which is usually a sign of a broken campaign or unclear directions.

You will notice in our confirmation sequence that we have a timer set to resend the confirmation and login credentials if they have not logged in within 24 hours. If they go another 24 hours without logging into our academy our campaign will notify our support team to reach out to the member to make sure they are able to access the course. If you wait for your customers to reach out for help, you are already at a loss and unlikely to keep them as a customer.

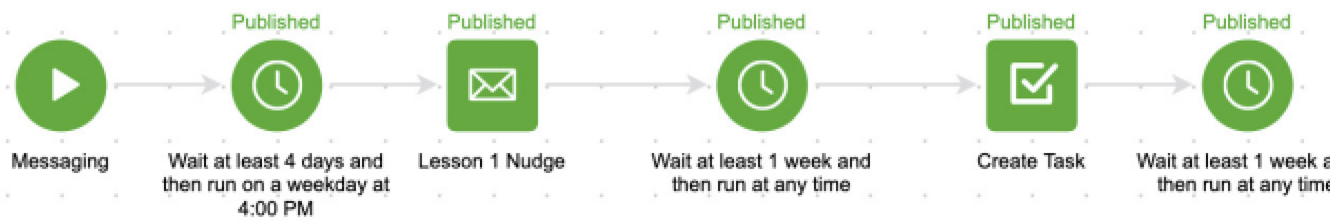


Our confirmation email consists of thanking our new member, delivering their login credentials, link to easily access the course, and the option to download the guide version right away.

After we confirm that our member has access to the course and has logged in, we set a timer for 4 days to nudge our member if they have not completed the first lesson in the course. Our four-day timer allows for plenty of time to complete the first course, even if they are super busy.



In our lesson nudge emails, we want to be compassionate in understanding that they most likely have a busy schedule that has kept them from completing the lesson. Our responsibility to holding our members accountable to their goals is not a reason to hound them, but rather encourage them to continue learning, implementing, and ask for help.



If they have gone another week without completing the lesson, our campaign sequence will notify our support team to reach out to our member and ask them how we can help them reach their goals.

We continue to follow this process until our member has completed this course, as you can see below:

Once our member has achieved their first goal of completing this course, we want to congratulate them for seeing their goal through.

blitzmetrics

Hi ~Contact.FirstName~,

We understand that you have a busy schedule so we just wanted to send you this message to tell you that your first lesson, *~Campaign.Lesson 1 Title_643~, under the* ~Campaign.Course Title_641~ is waiting for you!

This'll take you one step closer into becoming a Personal Branding Master!

In any case, it'll really help you get started in building your brand!

Go To Lesson 1

Please reply if you have any questions,
BlitzMetrics Academy Team

This then opens the opportunity for us to offer clarification and further directions on the most important part of the course, implementation.

If you want to know how to clone our campaigns to improve and automate your course fulfillment and support, see our Agency Infusionsoft Campaign Course.

How to Manually Add A User to Our Academy

Although this process is automated if the client used the same email address to purchase the course with the one they use with their FB account, there are times that clients don't use the same email address and we'll need to add them manually into the academy. Here are the steps on how to do this:

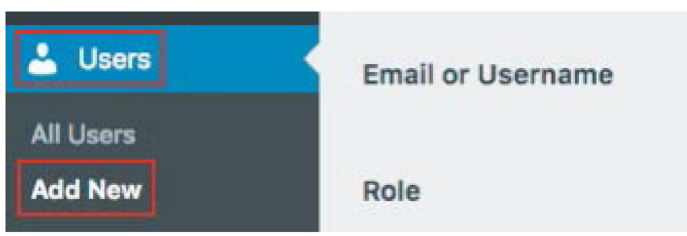
Video Guide: 0:00 to 2:10 of How to Manually Add A User to Our Academy

1. Obtain admin access.

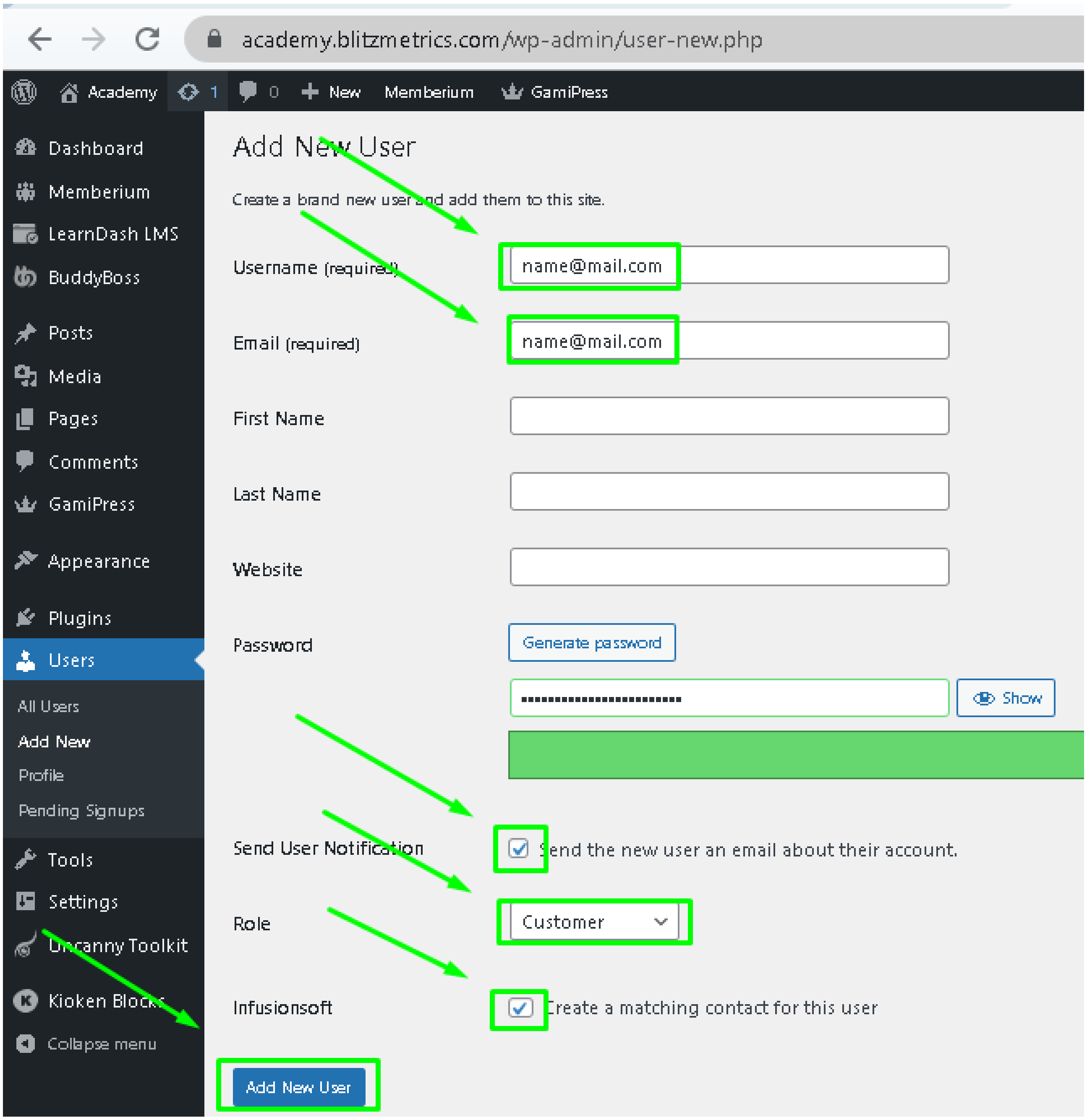
Go to the Skills Tracker tab of the Team Roster and identify the list of people who can grant you admin access by going to the "Grant admin access to Content Factory" column. As of June 10, 2021, the following are admin:

Melanio Soliman
Hezekiah Orteza
Juan Martho Agdan
Daniel Pasker

2. Request admin access from any team member.
3. After being granted admin access, go to https://academy.yourcontentfactory.com/wp-login.php .
4. Enter your username and your password.
5. Click "Log in".
6. Click on "**Users**" and then click "**Add New**".



7. Write their email address as their "Username" while making sure that they only contain lowercase letters.



8. Write their email address, first name and last name.
9. Check the box beside "Send User Notification".
10. Beside "Role", select "Customer".
11. Check the box beside "Infusionsoft".
12. Click "Add new user".
13. Email the user directly to inform the user that you have created the user's account. You may use this canned note:

"

Hi {FirstName},

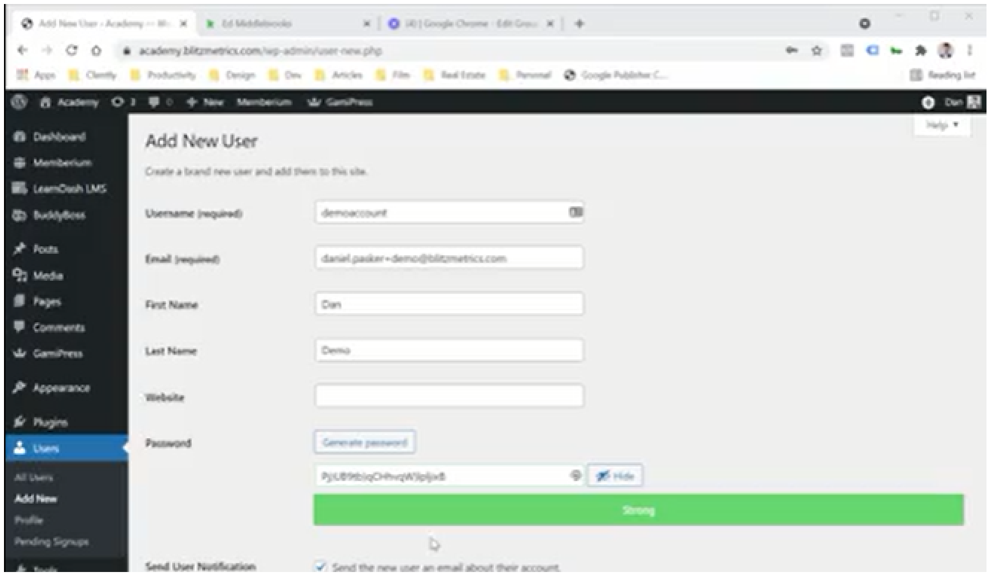
We have created an account for you for the Content Factory Academy.

You should receive a separate email from wordpress@academy.yourcontentfactory.com with the Subject: “[Academy] Your username and password info” that contains information about how to set your password and login.

If you have any issues logging in, or don't see the email please do not hesitate to reach out to us.

Best,
The Content Factory Team
”

How To Add a User to a Course in the Content Factory Academy



Video Guide: 2:11 to 4:06 of [How To Add a User to a Course in the Content Factory Academy]

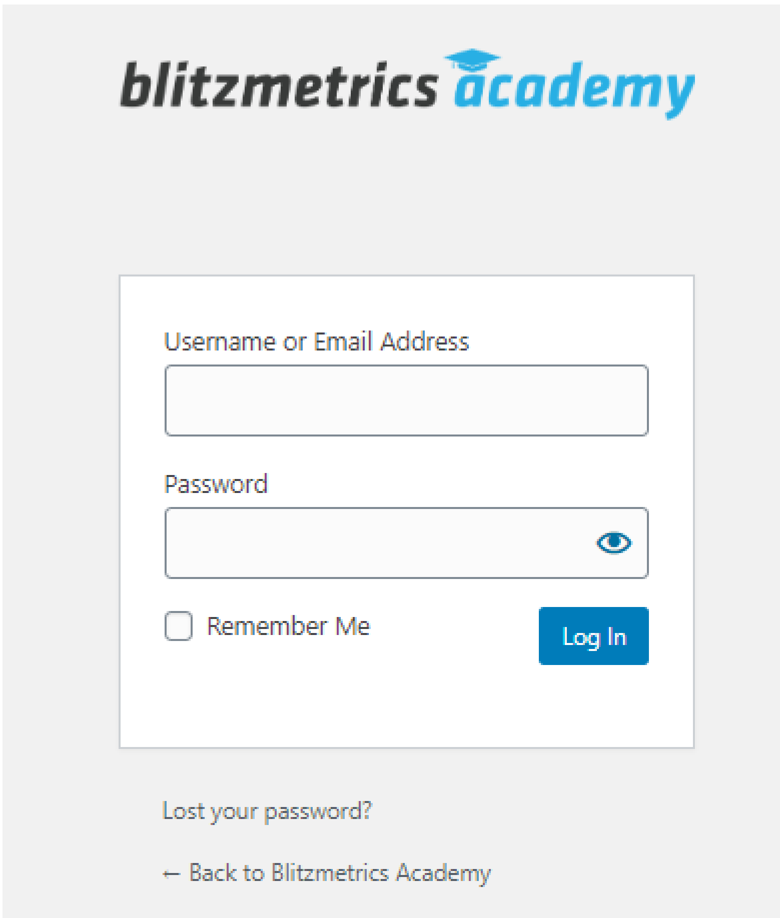
1. IF Office Hours,
Video Guide: 2:11 to 4:06 of [How To Add a User to a Course in the Content Factory Academy]
2. IF Internal,
    a. Go to Users
    b. Find the user and click Edit
    c. Scroll to User Enrolled in Group
    d. Click Internal Staff then the → arrow.
    e. Scroll down and click Update User
3. IF adding 1 INDIVIDUAL Course,
    a. Scroll down to Tags
    b. Type in Add/Remove Tags
    c. Enroll: Course Name
    d. Update User

When we manually add a student, we want to make sure to assign the Student tag so that if they purchase another course, Infusionsft knows they are already a student.

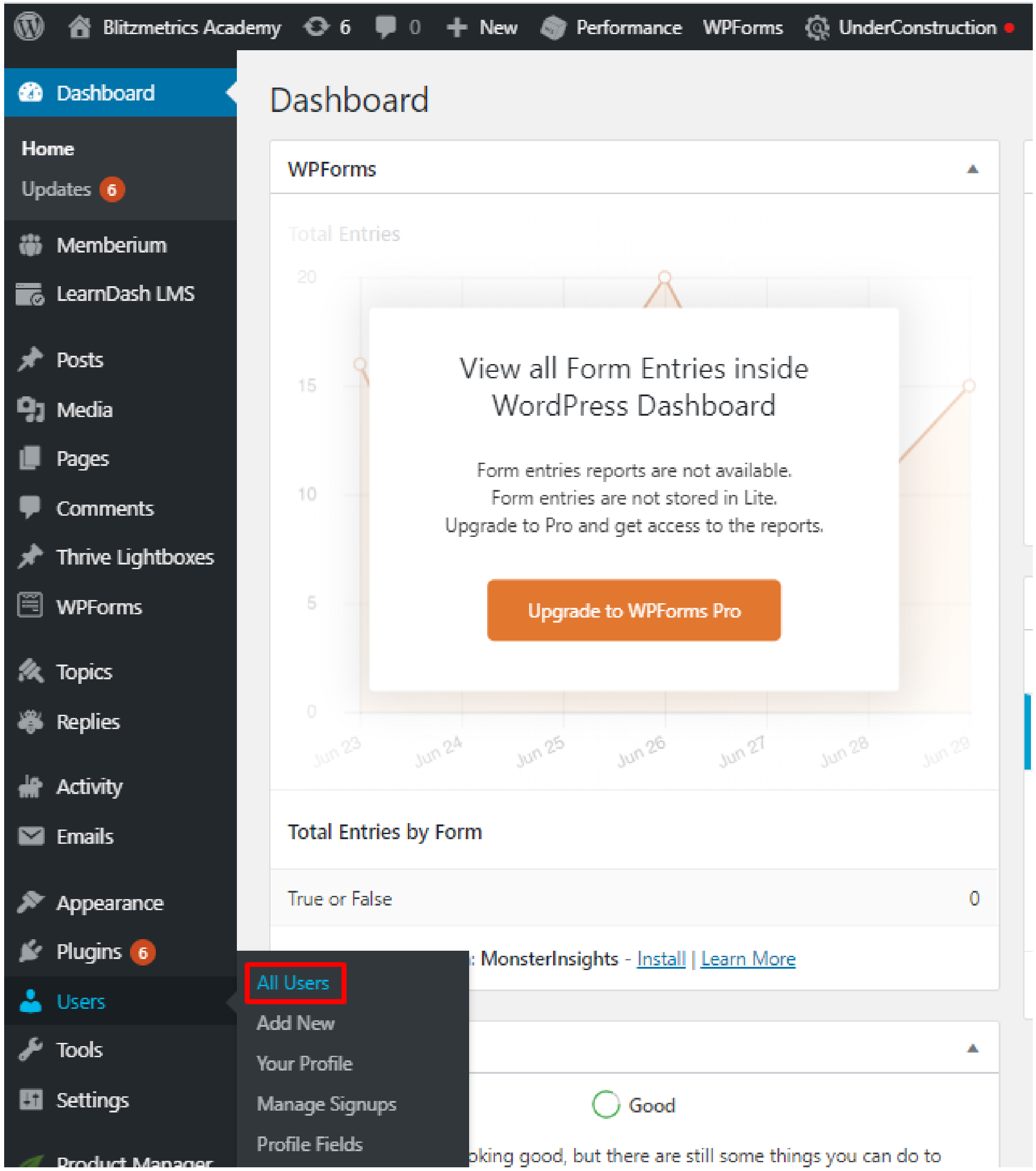
Guide On How To Add Courses To Content Factory Students

Whenever we encounter an email from students/ clients who bought a course in Content Factory saying that they can't access the course, here are the steps we need to take.

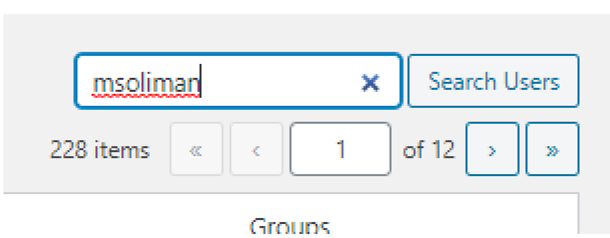
1. Check their names in Keap to know what course/s they bought or enrolled, paid or free.
2. Access https://academy.yourcontentfactory.com/wp-admin/ and enter your username and password:



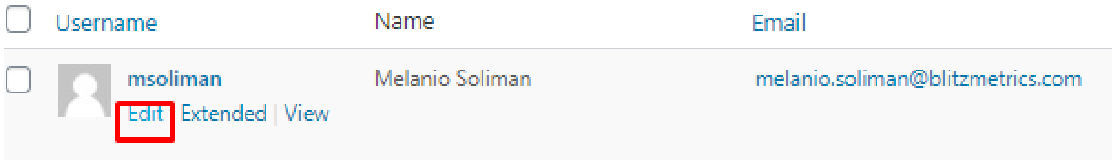
3. Click on **Users, All users**



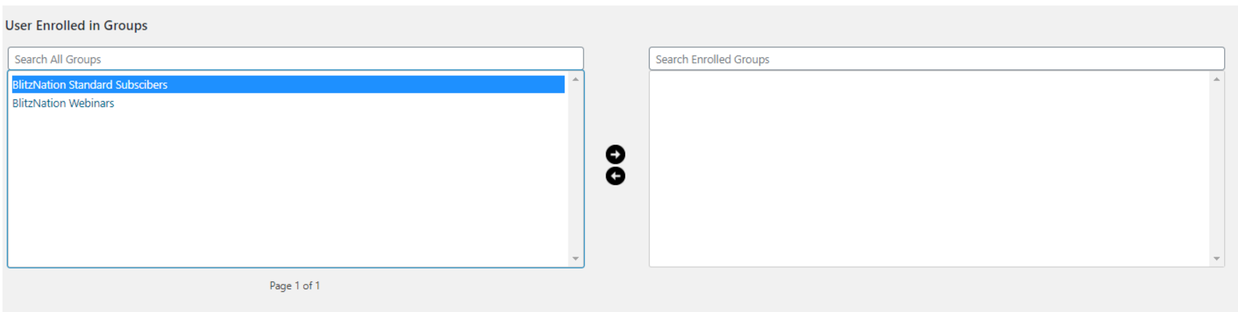
4. Type the user name, name, or email address of the client/ student that you will be adding course/s, and then click **Search Users**.



5. Hover on the name, and click **Edit**.



6. Type the course name on the search bar, or you may select it from the box below.
7. Click on the right arrow and the selected course will transfer to the **Search Enrolled Group**.
8. Make sure that the course is transferred to the right side box, and then click **Update Profile** below.



9. See if you have successfully added the course. To confirm, open an Incognito tab and try a user's account.

How To Transition Users From Office Hours Standard To Office Hours

Video Guide: How To Transition Users From BlitzNation Standard To Office Hours

How to Export User Quiz Data in Academy

1. Obtain an admin account.
2. Log into "https://academy.yourcontentfactory.com/login/".
3. Navigate to LearnDash LMS in the left panel.
4. Go to Reports.
5. Export user quiz data.

How to Export User Course Data in Academy

1. Obtain an admin account.
2. Log into "https://academy.yourcontentfactory.com/login/".
3. Navigate to LearnDash LMS in the left panel.
4. Go to Reports.
5. Export user course data.

How to Embed a Wistia Video in LearnDash

Video Guide: https://www.loom.com/share/154d5cb3c9b24bada265b2707b27a0bc

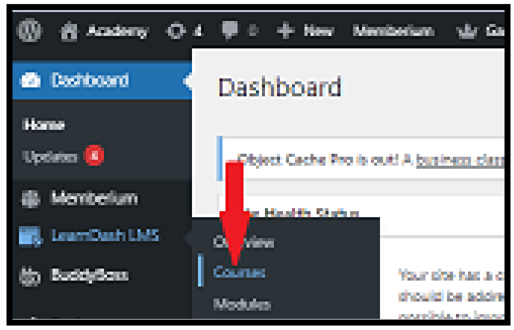
1. Identify the Webinar Course. If the course isn't created yet, create it--making sure to assign the category to Webinar.
2. Add a Module - Format like: 'Webinar Title' Video.
3. Make sure to check the 'Webinar' module category.
4. Copy embed code from Wistia.
5. Select the + → HTML.
6. Paste and Click Preview.
7. Update/Publish.

How To Update The Latest PDF Version Of A Guide On Our Courses In The Content Factory Academy

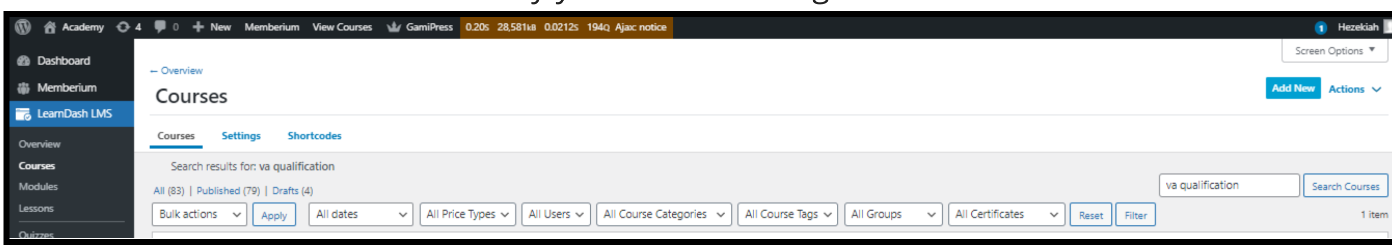
Video Guide: [Adding Materials to a Course]

How To Change An Academy Course's Visibility

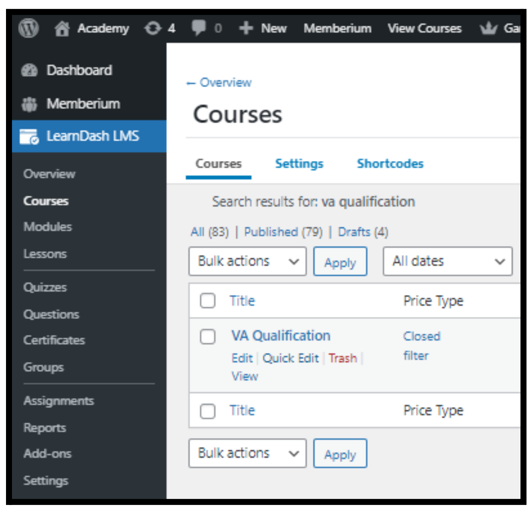
1. Email access@yourcontentfactory.com with your justification on why an operations specialist should grant you an admin account to the Content Factory Academy.
2. From the **Dashboard**, hover your cursor over **LearnDash LMS**, and then select **Courses**.



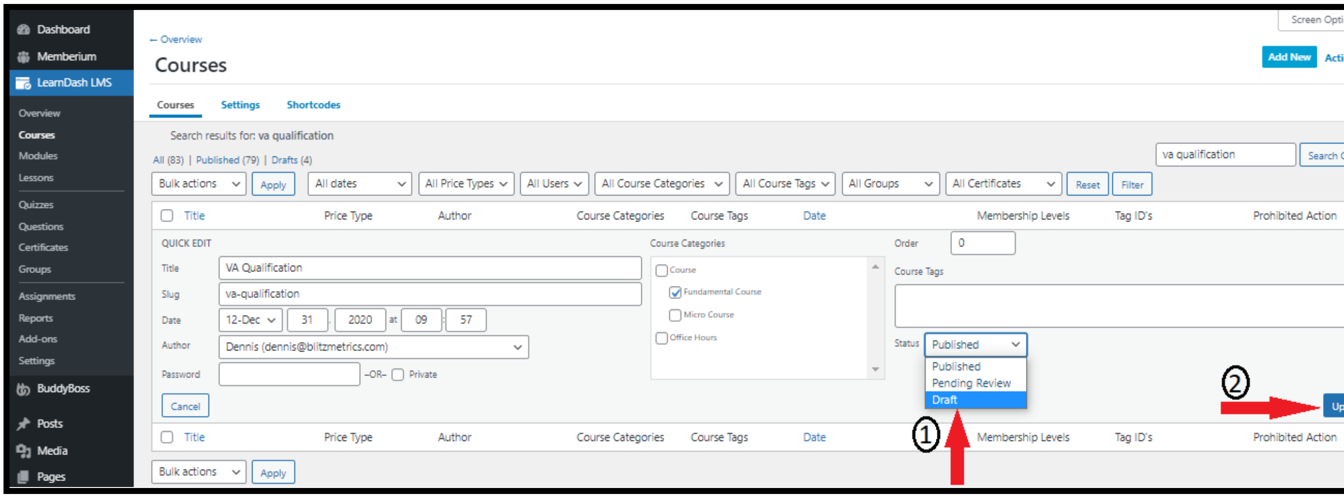
3. Search the course whose visibility you want to change in the Search Bar.



4. Hover your mouse to the name of the course, and then click **Quick Edit**.



5. Change the **Status** to any of the following:
    i. **Published** to list the and make the course publicly visible.
    ii. **Pending Review** is waiting for review by an editor prior to publication.
    iii. **Draft** to de-list and to make the course unviewable.
6. Click **Update**.

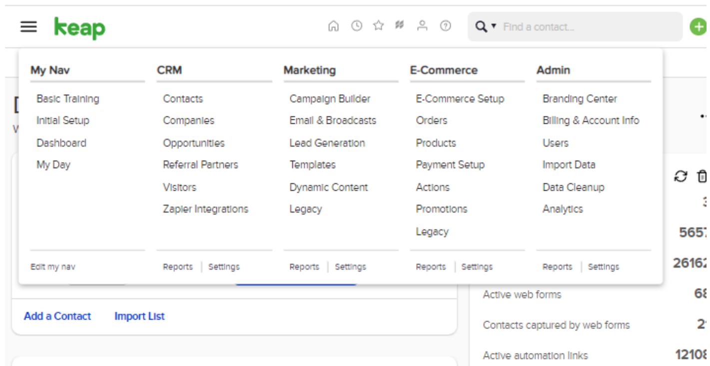


How To Grant Superadmin Access In The Academy

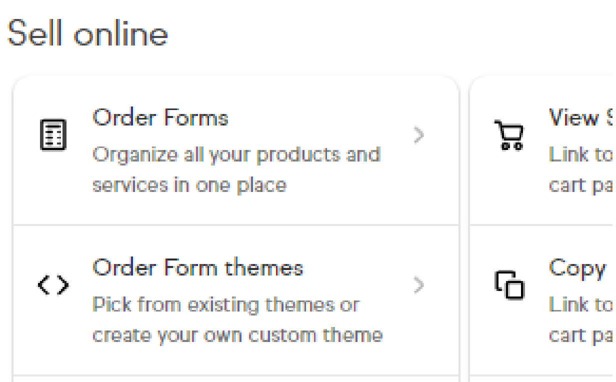
How to Create a Spiffy Order Form in Keap

Video Guide: [How To Create A Spiffy Order Form In Keap (Infusionsoft)]()

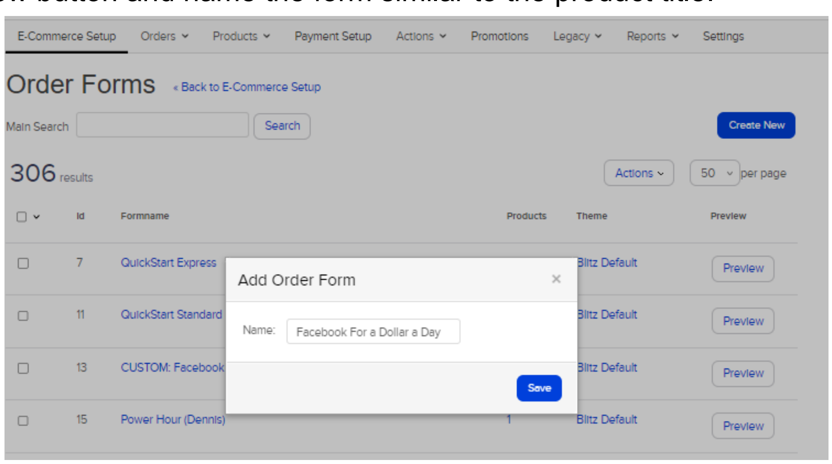
1. From Keap Dashboard, click the Menu icon and select **E-Commerce tab**.



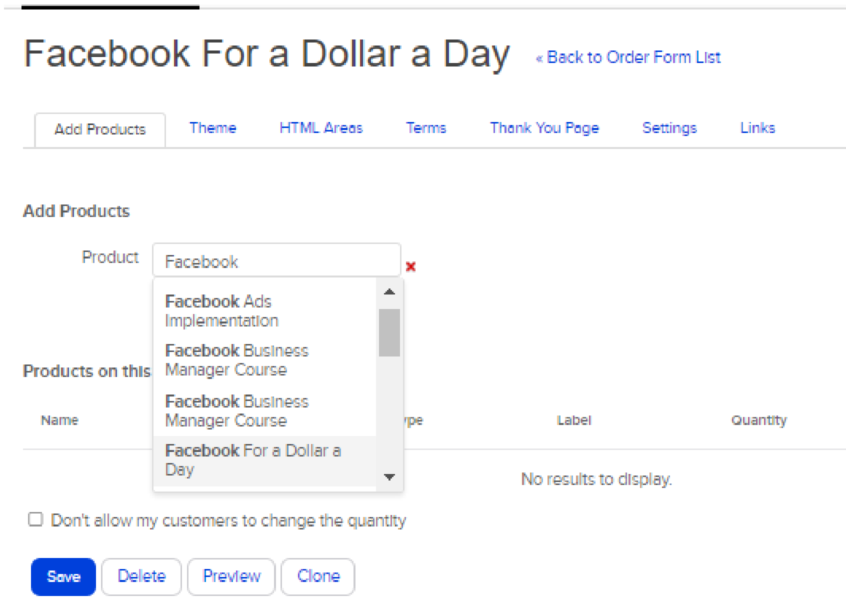
2. Scroll down to Sell Online and click **Order Forms.**



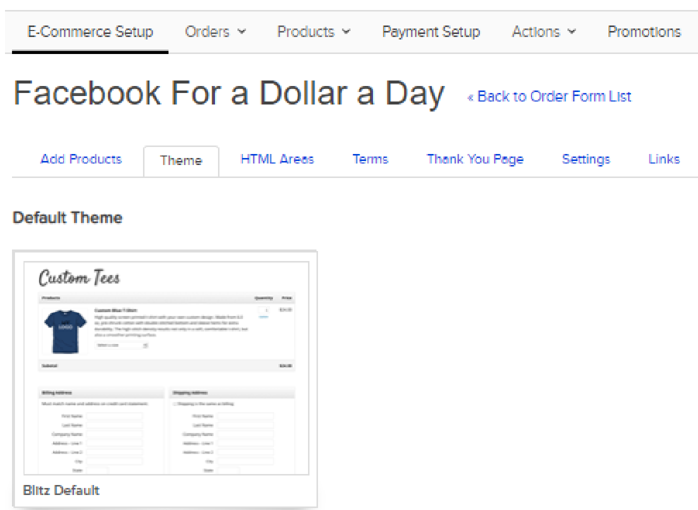
3. Click the Create New button and name the form similar to the product title.



4. Search your product then click the Add Product button.



5. Navigate to the Theme tab and make active the Content Factory default theme. This would automatically set your Order Form to Spiffy design form.



6. Now get your order form link by clicking the Links tab then copy the custom URL.


Facebook For a Dollar a Day
« Back to Order Form List
Add Products
Theme
HTML Areas
Terms
Thank You Page
Settings
Links
Order Form URL Copy
https://blitzmetrics.infusionsoft.com/app/orderForms/5ad6f030-e254-48f8-8c6d-5d786127ed8a
Custom URL Copy
https://blitzmetrics.infusionsoft.com/app/orderForms/Facebook-For-a-Dollar-a-Day
Edit

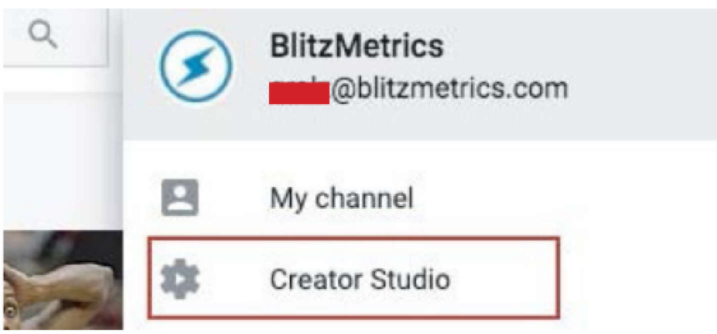
Remove People from Accounts

Before removing people from accounts, you'll need to have admin level access to the specific tools where you'll be removing people from. When removing accounts from Content Factory, there are six places you need to ensure that access has been removed:

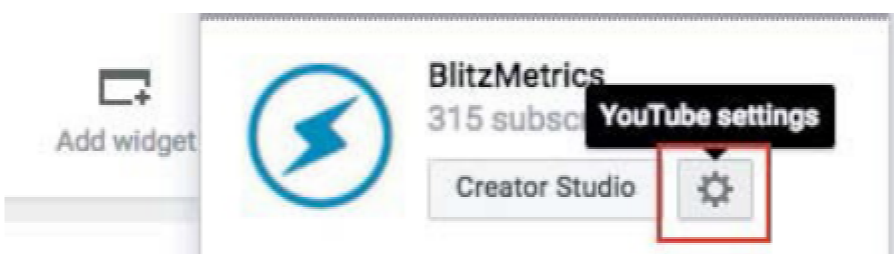
1. YouTube
2. TimeCamp
3. Basecamp
4. Content Factory Academy
5. Google Suite
6. Facebook Business

YouTube

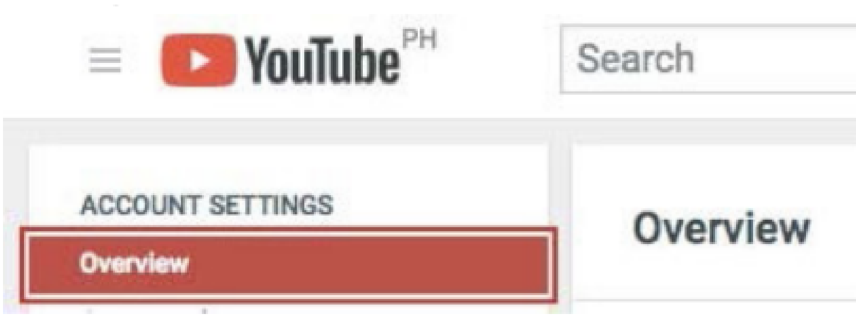
1. Go to Creator Studio.



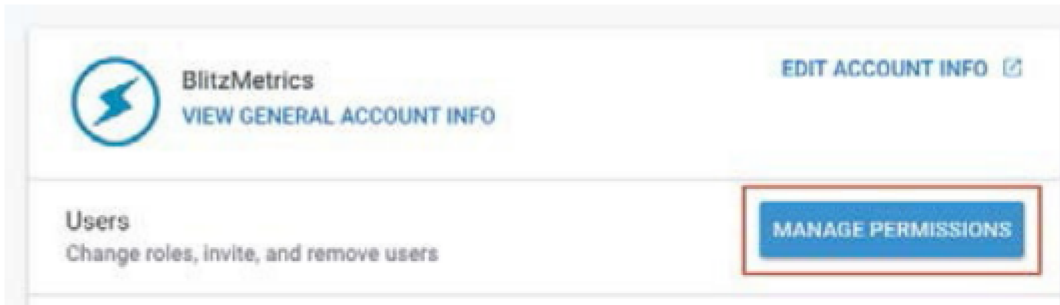
2. Once you've been redirected to the Creator Studio, Click "YouTube Settings".



3. You'll be redirected to the "Overview" Screen and click "Add or Remove Managers".



4. You'll be redirected to Brand Account Details and then click "Manage Permissions".



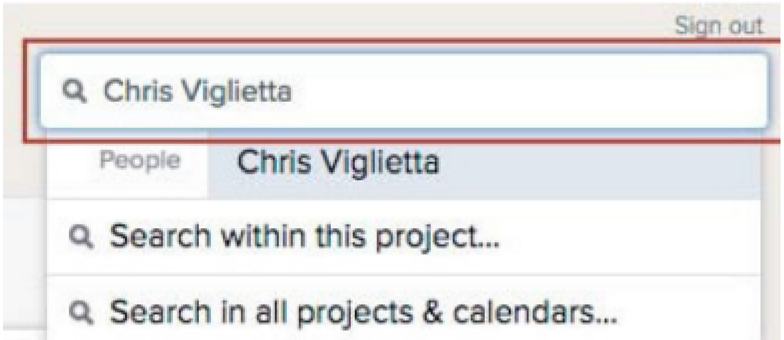
5. Choose the person who needs to be removed and follow the prompts.

Basecamp

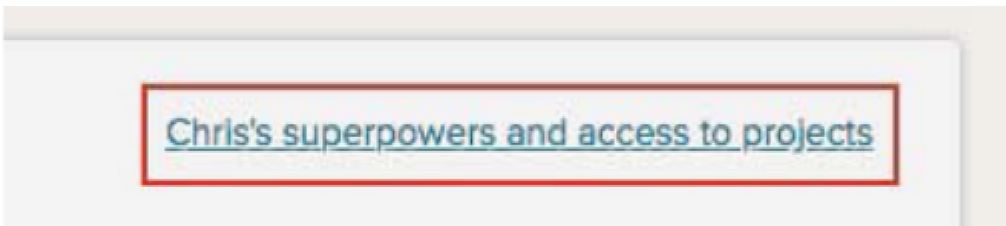
1. Go to 'Activity' located at the top of Basecamp, then go to "Someone's assignments"
2. Search the name of the person being removed.
3. Re-assign all of his or her to-do entries to Juan Agdan or anyone from the Project Management Team.
4. Edit the name of the task such that "TEMP." is at the start of the to-do entry like this: "TEMP. Edit One Minute Video."

5. Under “Notes”, write who the task used to be assigned to.
6. Do this for all of his or her to-do entries.

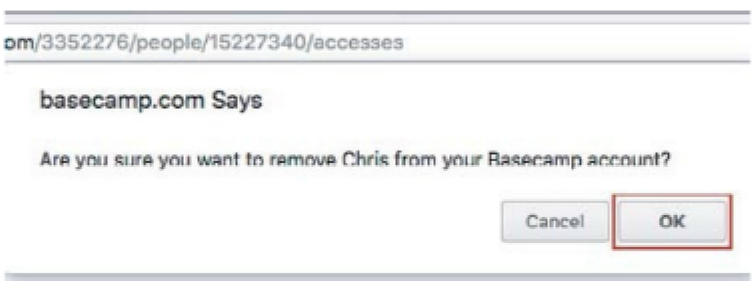
7. Search for the person you want to delete by either placing their name or their email address.



8. Click on “Name’s superpowers and access to projects”.

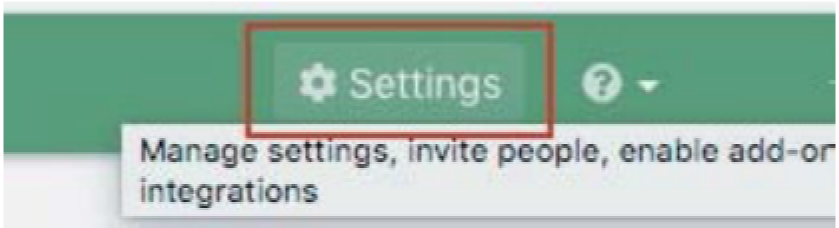


9. Click “Remove Name completely from Basecamp” and then click “OK” to confirm removal from Basecamp.

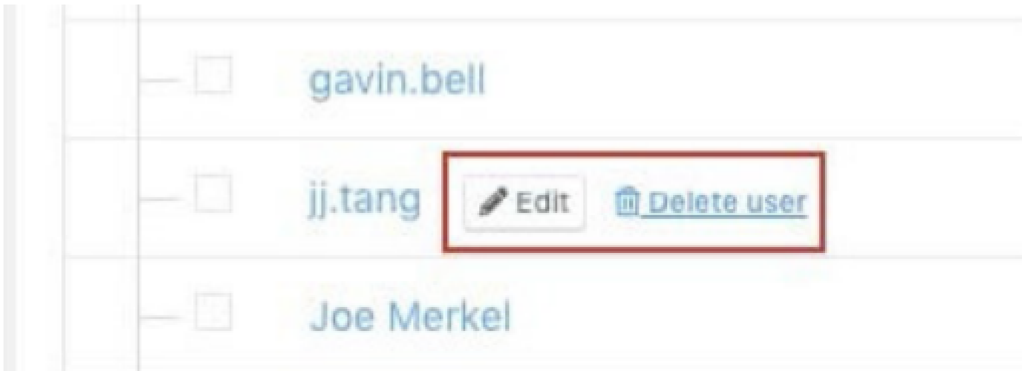


TimeCamp

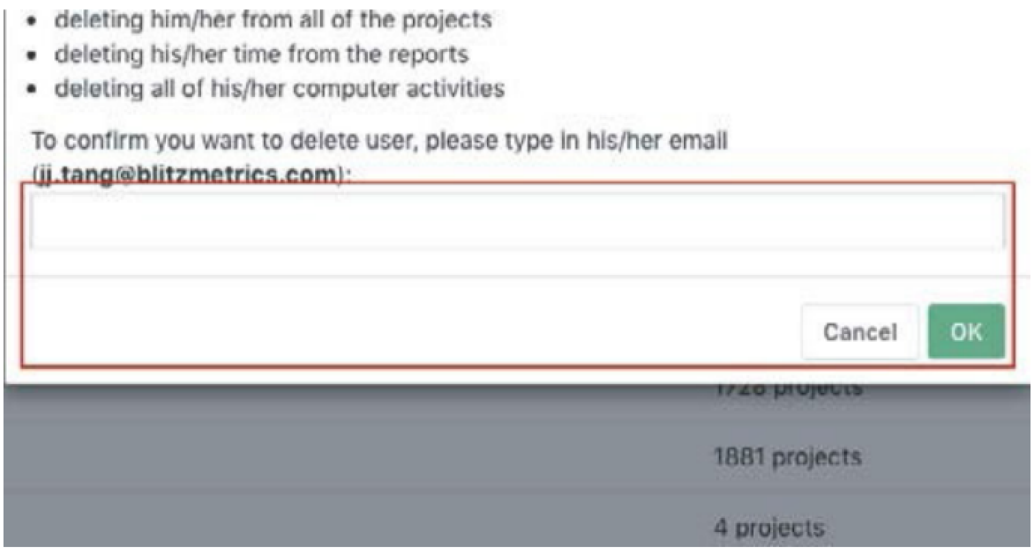
1. Click on “Settings”.



2. Hover over the person who should be removed and click “Delete User”.

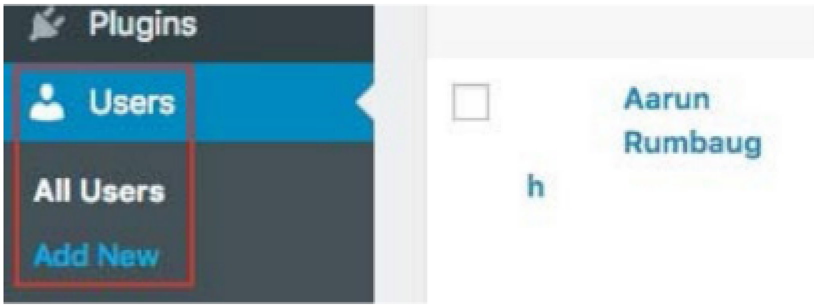


3. Once clicked, a pop-up asking for the correct email address to be removed will show and you’ll need to write the email address manually to remove the person.



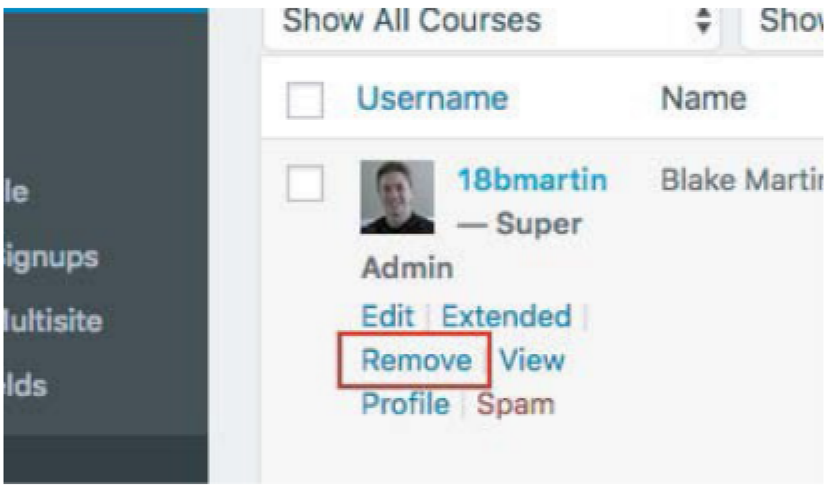
Content Factory Academy

1. Go to “Users” then “All Users”.

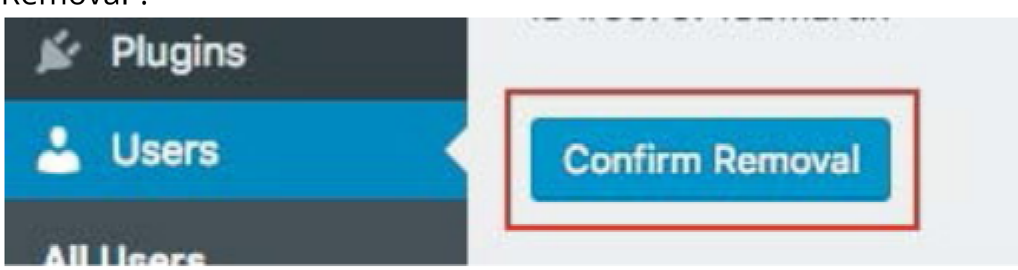


2. Search for the email address of the person you want to remove using the “Search Users” Option.

3. Hover over the person you want to remove and click “Remove”.

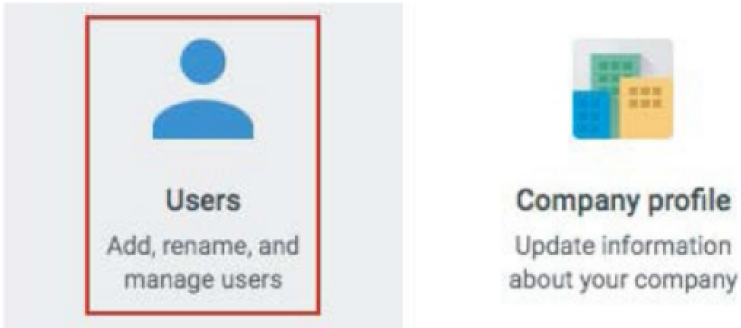


4. You’ll then be redirected to the confirmation page for removal and click “Confirm Removal”.

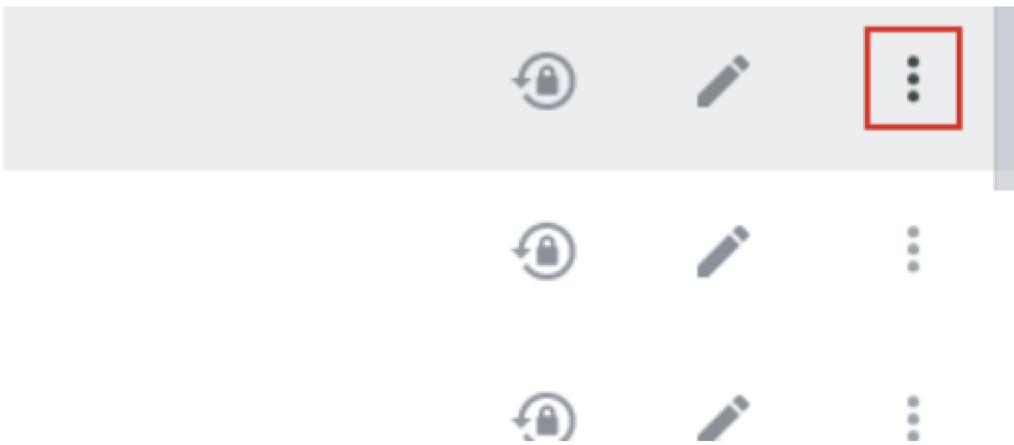


Google Suite

1. Go to “Users”.



2. Hover over the person you want to remove and click the dropdown menu on the far right and click “Delete”.



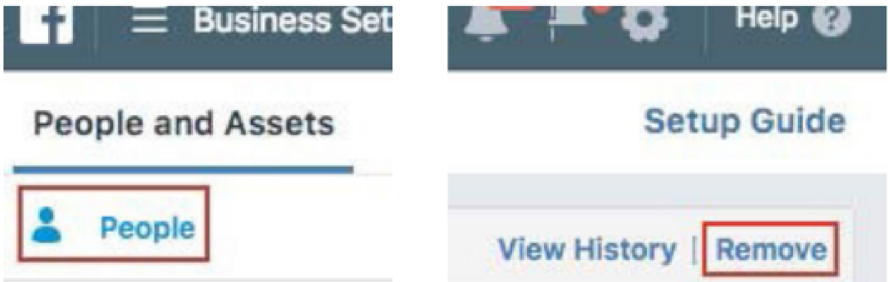
3. You’ll be redirected to a pop-up menu and click “Assign a New Owner for this Data”.

4. You’ll then need to choose a person to take over all the data associated with the person you want to remove. By default, the new owner is Logan Young. Once a new owner is placed, click “Transfer Data and Delete Account”.

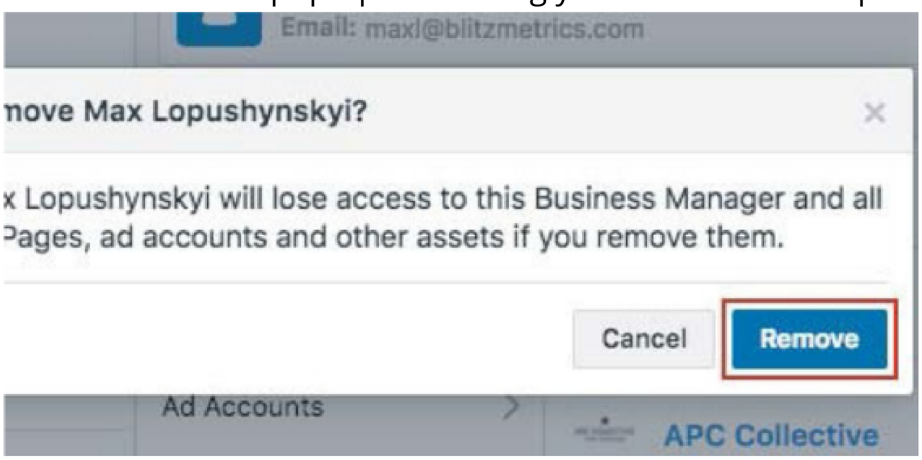
Facebook Business

1. Click on Business Settings.

2. Go to “People” and search for the person you want to remove and click their name and click “Remove”.



3. Click “Remove” when the pop-up confirming your removal of the person shows up.



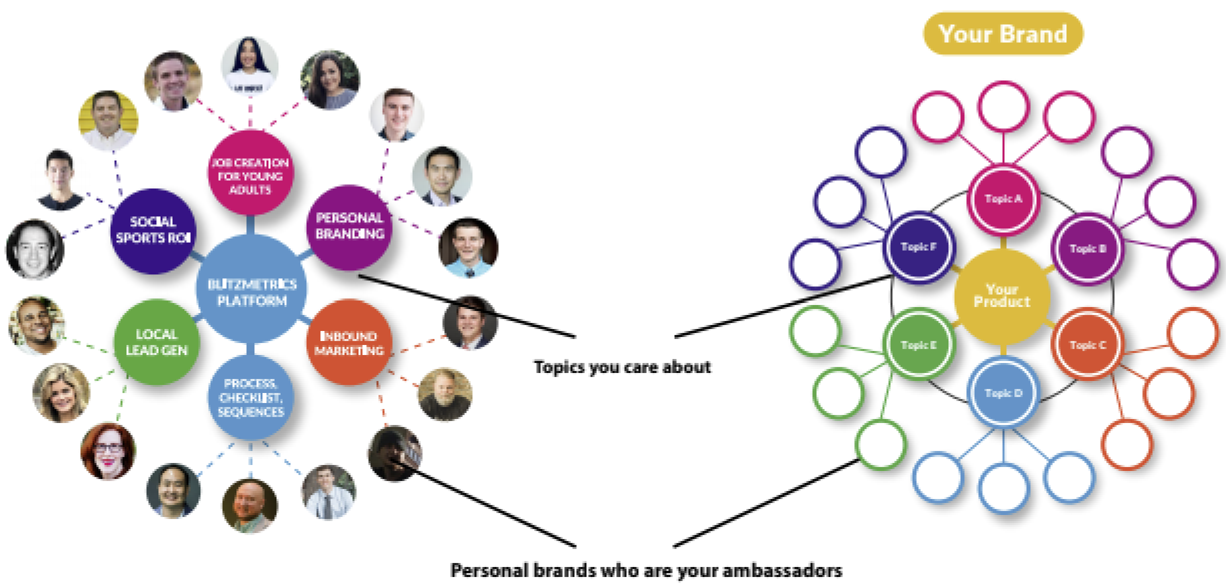
The Content Factory: Organize your Content by Topic

In order to organize your content, you need to map out what we call a "Topic Wheel". Organize your one minute videos into topics, which are the middle ring. The topics then go into what you actually sell: your product.

This maps your goals back to topics and your topics back to people who are authoritative in these topics.

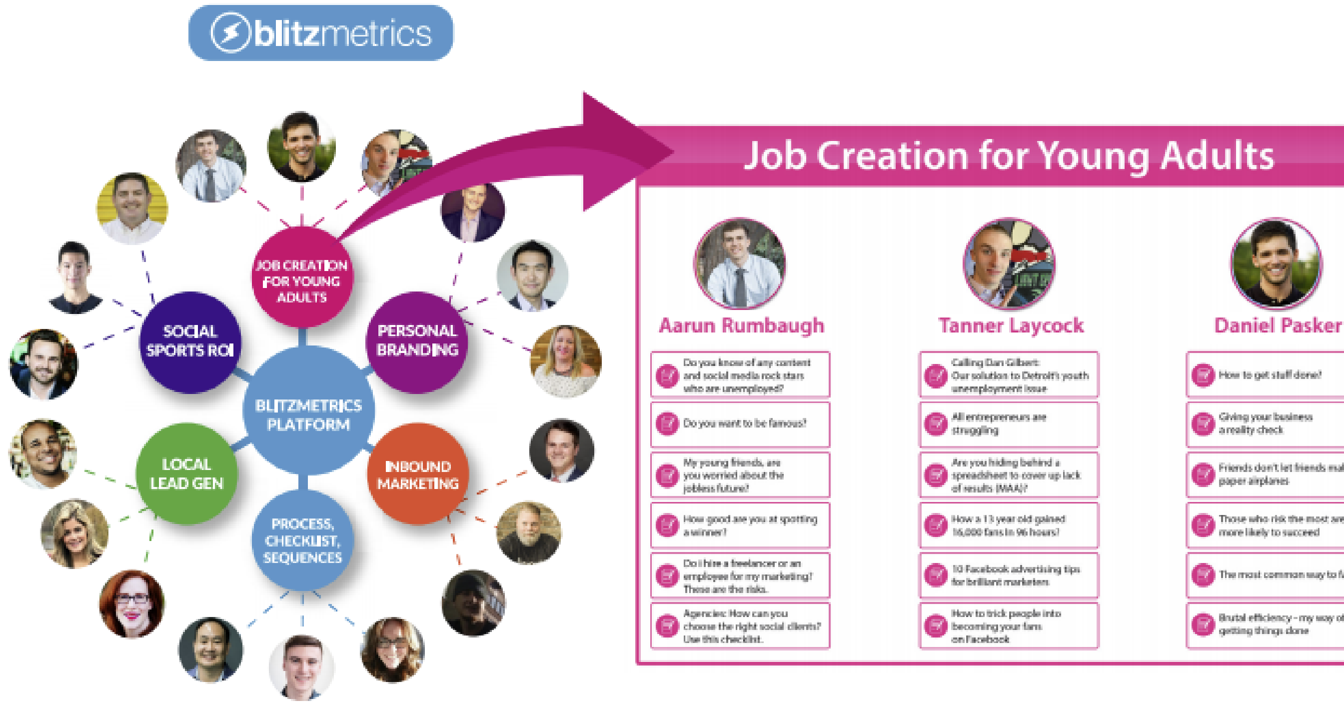
People connect with your "WHY" (outside ring), then want to understand HOW (middle ring), and only then care about WHAT (the product/service you sell).

Our personal brands allow us to show this through the content that we create, which of course always ties back to our "WHY". At Content Factory, our "WHY" is to educate and create jobs for students, which carries through in all of what we do. Once you've determined yours, and the topics that go with your why, you can easily organize videos into topics. Follow these simple guidelines:



Topic Wheel

You can break down each topic into smaller bits, where one minute videos come in. From this you can organize your content into specific courses. Of course, topics intertwine, and videos can be used in more than one course. For example, we use this Topic Wheel to explain Personal Branding, but it is also useful for organizing content.



Skinning a Document

Here's what you need to know about skinning a document:

- We have a master version of a particular document (like the SAE or Digital Plumbing) that's a template-- tuned through multiple iterations in it's own thread. One thread per document, so we don't get confused. Share the base files for other designers to be able to skin, since using just the PDF output is insufficient.
- As we decide to create skinned versions, our internal designer or another designer (usually Fiverr) creates a new Basecamp thread for us to iterate there.
- Any skinned document (one-pager XYZ, personal branding course, speaker reel, etc) requires specific input items from that client/partner. Usually it's a collection of their photos/videos plus contact information, making it easy for a designer to skin it up.
- Most skinned documents are co-branded, not white-labeled. In short, co-branded shows are "powered by Content Factory" while the partner/client brand is dominant. A white-label makes the document look completely like theirs (nobody can obviously tell it's from Content Factory). Usually, we cobrand.
- With my final approval, we can send to the client or even print a hard copy.
- Most of the time, the initiation of skinning of a document or set of documents comes from them buying it via a landing page + order form, as a product we have available for sale. But for key clients (PRO and VIP in Office Hours) and some partners, we produce skinned documents as part of their membership.

Reports

A strategy deck is for executives on enterprise/partner projects.

- We cover long-term planning that goes beyond the day-to-day execution of the Success Tracker (6 phases).
- These relationships require collaboration between multiple partners, often to build software and new things (which we don't do for clients).
- This software/technology means we can then launch packages because of the strategy deck, and that means we need slides explaining particular concepts unique to the project.
- Because of the unique nature of these deals, we cannot templatize or do many of them, unlike client package work.
- Only internal, expert-level team members can be involved in strategic projects, like MariMetrics, Digital Innovation Lab, our platform, and development of our various projects.
- The first section of the ST is called the "Executive Summary", since that's the level an executive needs to see, not every nitty gritty detail.

A performance reporting deck is for operational staff on clients of all levels.

- The Success Tracker is our main vehicle for reliable operational execution on individual clients.
- Team members certified on our platform follow the same processes over and over, #DDD/#CID/#MAA.
- They are not inventing new things, they are following checklists.
- We may create a strategy deck to accompany the Success Tracker for certain "lighthouse" clients so we can use them as an example to dominate a particular vertical, a shining example we use to acquire more of the same client and follow templatable execution. The strategy deck lays out how we'll grow this business.

Organize your reports, make them look nice, and give some #MAA (Metrics, Analysis, and Action) on them to create a case study like the one below of the Golden State Warriors.

Golden State Warriors Case Study Example

Facebook endorses 3 ways to measure social ROI

1. Matching to conversions via tracking codes or datalogix (3rd party sources)
2. Surveys to measure causal impact, as opposed to perceived impressions
3. Lift testing (augmented by surveys or media mix modeling)

The first thing you need to do is take a snapshot of the overlap between the team and the sponsors.

You can do this on both Facebook and Google by getting counts in the ads tool. It's free, easy to
use, and an invaluable tool.

The percentage of density between the Warriors and BMW of San Francisco is 50%. This means
half of the people that like BMW of San Francisco also like the Warriors.

We can expect this percentage of density to increase after the BMW dealer has their logo on thousands of Warriors t-shirts. See the infographic below to see how BMW and the Warriors benefitted each other.

Did you catch that Warriors fans with an interest in BMW had the highest click-through rate? Makes sense-- it's still Warriors gear, it's just that BMW benefits as well. So how many more cars did BMW sell following these promotions?

How many more cans did Red Bull sell when Felix Baumgartner did a freefall from space? It's the same principle. Red Bull didn't send their CEO out of the capsule, but you can bet he benefitted.

You can see that 30% of Oakland A's Fans are interested in the Golden State Warriors. Additionally, a Warriors fan is 40 times more likely to like the Oakland A's than the general Facebook population. The Warriors share more affinity with the A's on Facebook than the Raiders or any other sports team from that region.

Now you have a qualitative and quantitative basis to determine if we impacted the digital audience in one or multiple channels.

You can see which content is most closely aligned with the sponsor's core targets and how that's changed over time.

Provided the sponsor tells you this in advance, you can set a good baseline.

And you would need to know their customer sufficiently, or your sponsor's messages will not resonate with the team's audience.

That's the top of the funnel, which we call Audience. The next stage is Engagement-- not just how many impressions we drove (passively seen or not), but if fans took action.

The basic model is Earned Media Value (EMV), which is largely impression based, but there are smart ways to determine if these impressions were quality and what they're worth.

With Facebook's analytics, we have instant access to numbers we can use to help us calculate ROI.

Conversion is the most difficult part of this, but it's also the most valuable.

Even if we can't tie individual transactions back to the original brand exposure, we can still measure lift — or incremental impact — from various marketing efforts if we set up test and control cells. The process is really pretty simple once you wrap your head around what you're trying to measure. In this case, we want to run a lift test to find the impact of adding a sponsor to overall impressions and conversions. Here's one way to set it up:

1. **Define your audience -** You're going to want to start out with an email list of about 10,000 emails — any less might not work for this test. Load the emails into Facebook's Custom audiences.
2. **Split the emails in half -** One half gets assigned to an ad set with the sponsor and the other half is your control — an ad set with just your brand.
3. **Create your ad set -** Here is where you have to decide what kind of ad you want to run. To measure sponsor ROI, it'd probably be best to run a Page Post engagement ad. This allows for a large image highlighting your brand and/or sponsor as well as the option for copy from your post.
4. **Compare the results -** After letting the ads run for a sufficient amount of time (a week or more), it's time to look at the data. Check out your impressions between the two ad sets. If you picked a sponsor that your fans have a strong affinity towards, like we discussed in part 2, you should notice an increase in impressions from the sponsored ad set when compared to the control set.

5. **Calculate -** You're home free from here. Figure out the difference between the two, put that into a percentage of total impressions, and you've found the social ROI of your sponsor.

That wasn't so bad, right?

Creating a Sequence

Ravi Shukle explains the power of sequencing:

"In today's digital world with so much information out there, it can often be hard to stick to one piece of advice, or even a single strategy. That is why the best way to see proven results from the information you are absorbing each day, is to put it into a sequence. Collect the information you are looking for, and turn this into an organized sequence that you can follow to help reach your end goal. This will not only ensure you reach your goal, but having this sequence in place will help you to stay organized and efficient every step of the way.

You want to reverse engineer the solution you are looking for and research the key steps your business needs to take in order to arrive at that solution. The best part of putting this into a sequence is that the process can be repeated over and over with guaranteed results."

The guide versions of the courses should contain what's already in our presentations. Otherwise the training will be out of sync.

When we can keep the underlying guides and presentations in check, then we can roll them up to the Master Guide and Master Presentation.

If we update the Master Guide and Master Presentation with items that should first belong in underlying guides (like the Digital Marketing Training System-- stuff like what happens at each level), we get out of sync quickly. -Ravi

Who this is for

Anyone who wants to share their knowledge, not to get rich, but to help others by mentoring and teaching at scale.

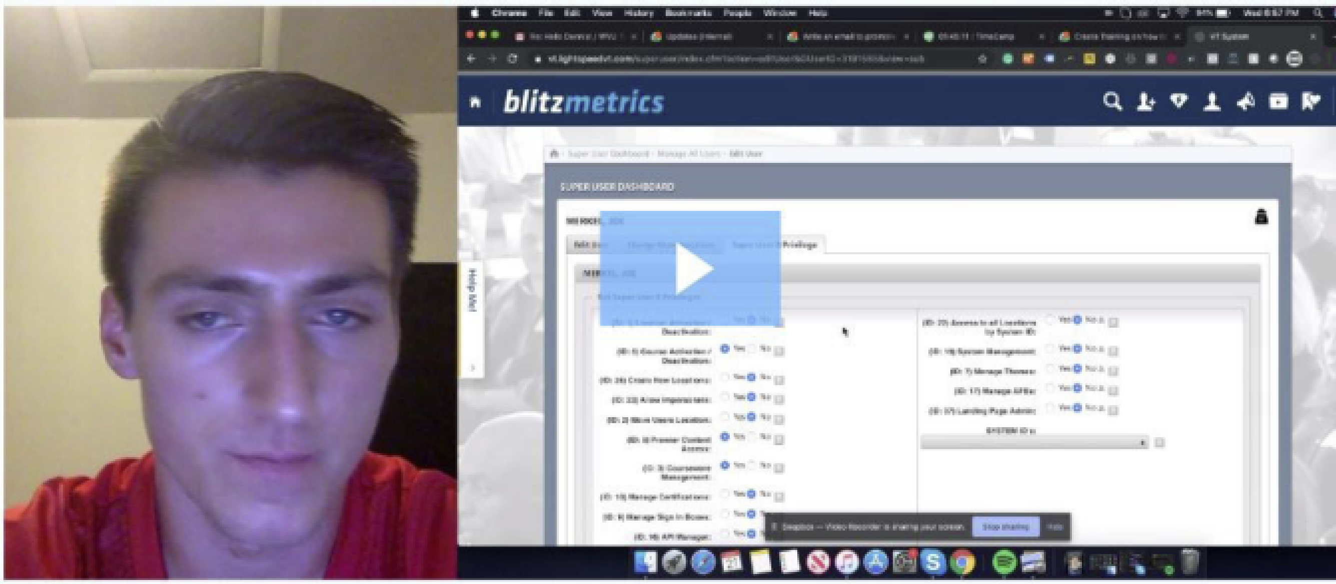
Video: Marketing Technology Flow (1:15:56)

How to Upload a Course to LightSpeed VT

Access levels

To upload content and create a course, you will have to either be a super admin or a top admin with superuser B privileges. If you, as a superuser want to have another user upload a course follow the steps below:

1. SuperUser Dashboard
2. Manage All Users (202)
3. Search for their name
4. Click their username
5. Scroll to Application Settings
6. Select "Top Admin" in the drop down menu next to Access Levels
7. On the top of the page select "Super User B Privilege"
8. Select the following privileges for the user:
    - Course Activation/Deactivation
    - Premier Content Access
    - Courseware Management
    - Content Containers
    - Bulk Courseware Activation Tool
    - Training Completion Admin
9. Click Update



[Video: How to upload a course to LightSpeed VT (02:21)]

Uploading Content

After making sure the user that will upload the course has proper access, your next step is to upload the content. To do this, follow the steps below:

1. SuperUser Dashboard
2. Upload Content
3. Click “Browse Files” and upload all of the videos in your course

Naming Convention

Once your content has been uploaded, if you haven’t yet done so, you will want to name the video files in your course using a naming convention that will tell you exactly what this video is and where inside the sequence it will be placed.

We like to follow a naming convention that is aligned with our IF/THEN triggers (IF - what is the metric or answer given /THEN - what is the next step of the sequence) and what step in the sequence it will live.

Naming convention:
(number of step in the sequence)_(choice they selected)_(next step or question asked)

Example:
(Show Bandersnatch video map with naming convention)

- Step 1: 1_if_introduction_then_who_does_pushups
- Step 2/Video 1: 2_if_dennis_then_have you_seen_bandersnatch
- Step 2/Video 2: 2_if_landon_then_have_you_seen_bandersnatch
- Step 3/Video 1: 3_if_seen_bandersnatch_then_show_me_how
- Step 3/Video 2: 3_if_not_seen_bandersnatch_then_show_me_bandersnatch
- Step 4/Video 1: 4_if_show_me_how_then_what_business_are_you
- Step 5/Video 1: 5_if_author_speaker_coach_then_fill_out_form

To name your files, follow the steps below:

1. SuperUser Dashboard.
2. Media Library.
3. Click on the Pencil (edit) button on the right to name the video files and provide a description of the video.

Interactive Video Composer

Now that you have you content uploaded and named following a naming convention, the next step is to put your course together in the Interactive Video Composer:

1. SuperUser Dashboard.
2. Interactive Video Composer (303)
3. Create New.

1. Select your first video which should start with "1_"
   1.1. Confirm that your file is still named correctly and that it is the right file. Select Interactive Video.
2. Add the LoopBack Time (restart at this point if they have not selected a choice when the video ends).
3. Add the question that you will ask in this video.
   3.1. Select "Display Question and Buttons on Video."
   3.2. Select what alignment you want to have your questions and buttons to have on the page.
   3.3. Add "Custom Display Time" (when you want the decision to be made).
4. Button Name: Add the Button Name for the choices that you have determined to include.
   4.1. Link: Select Video from Media Library, Document from Media Library, Custom URL, or another segment in this course.
   4.2. Button Color: Select Primary or Secondary Color.
   4.3. If this is not the end of your sequence, repeat steps 1-4.

Guide On How to Do Basic QA

General

- All text in a course/document should be sans serif font, with the exception of cursive for signatures.
- IF the word is an acronym or abbreviation, THEN the first instance of that word must have its meaning, e.g. “Social Amplification Engine (SAE)”.
- For Search Engine Optimization (SEO) there should be no hyperlinks to any site unless they are your own or our clients, partners, or affiliates, e.g., there should be no hyperlinks to google.com, facebook.com, and other such sites.
- Make sure there are no graphics, images, text boxes, etc. blocking any text.
- Make sure page numbers are clear. This means they’re not layered over a different page number from a previous version, and they’re not blending in too much with the color of the background.
- Because authorship changes sometimes, do a Ctrl +F (Command +F) search for the author’s name. Edit these where needed. For example, in a course where Dennis is the author, there was a point where it said something like “Dennis’s rabbit, Mister B, was…” I had to change this to “My rabbit, Mister B, was…”. (NOTE: Image descriptions are an exception to this rule, since the reader can assume they were added post-production.)
- Avoid careless spelling mistakes. Examples:
    - At one point, we had to change each instance of “CTO” to “CEO”. The person making this change clearly used the “Find & Replace” feature since every instance of “doctor” had become “doCEOr”. Be wary.
    - I recently came across “receive” spelled “receive”. Use a spell check.

File name

- Keep it all lowercase.
- Make sure it exactly matches the file name on the bottom of the cover page.
- Make sure our various documents—all courses, guides, and training documents—have coach_yu_ as the prefix in their file names and have the date and version on them, so we can tell if we are using an outdated version.

If it’s for a partner, then have the partner prefix, like vendasta_,infusionsoft_, bws_ , adu_, fiverr_, stukent_, and so forth.

Much easier to search when we follow our naming conventions.

Cover page

- Make sure the background image is one that shows the author.
- Make sure the author's name is that of the person in the picture.

- Make sure the author's title is correct.
- Make sure the file name at the bottom exactly matches the actual file name.

Table of contents (TOC)

- Only include sub-topics if there are at least two branches from the parent topic.
- Make sure the topics in the TOC match the page headers 100%.
- Make sure all page indications are correct. For best results, do this as the last task of your iteration.

Headers

- Every page needs a header, either in the top blue banner or above the top line, depending on the course format.

Welcome page

- Make sure, when it says "A message from ______", that it matches the name of whoever the message is from. 99.999999% of the time, this will be the author of the course.
- Make sure the position/title matches that of the author's, too.

Links, Hyperlinks, and Footnotes

- Make sure the footnote numbers are in proper sequence, both after the hyperlink and at the bottom of the page.
- Format footnotes at the bottom of the page properly. Reference page 5 of the FDD to see how this should look.
- Format footnotes attached to hyperlinks properly. This means:
    - The hyperlink is blue
    - The number is touching the hyperlink (i.e. no space between)
    - Not a single character between the hyperlink and the footnote number is black or any other color besides blue.
- At the end of your iteration, check all links, hyperlinks, and corresponding footnotes to make sure they are linking to the right places.
- Avoid using internal only links for paid/external courses.
- Make sure the link of video is relevant to the anchor text it stems from. If video, watch a few seconds. If it seems irrelevant, consider finding a more relevant video.
- If the link/hyperlink is at the end of a clause or sentence, make sure the period, comma, colon, or whatever is never part of the hyperlink.

Video thumbnails

- Make sure the play button is centered perfectly within the thumbnail.
- Include the video title at the bottom-right of the thumbnail in bold.
- Include the run-length of the video after the title in standard font (not bold).

Image descriptions

- In the case of replaced images or career changes, make sure the images descriptions are up to date and accurate.
- With very few exceptions to this, format all image descriptions like so:
    - FirstName LastName (position in image), Title | Company
    - FirstName LastName (position in image), Title | Company

Checklists, overview and detailed views

- If the text is an option the reader will click when going through the checklist, bold that text. (E.g. Click Save)
- If the text is an option that the user won't necessarily click, but will aid in navigation, put it in quotation marks. (E.g. Select the check box next to "Ad Name".)
- Because interfaces change, go through the process discussed and see if the options have changed. If they have, edit accordingly. For example, the process to embed a post on Facebook used to be "Click the down arrow at the top-right of the post. Select Embed post." They've since changed it, and now this same process is as follows: "Select the three dots at the top-right of the post. Select Embed."
- For the same reason as the previous point, update screenshots accordingly, especially if the interface shown in the screenshots is obviously outdated.
- We don't want to have each item of a checklist to be in bold-- since if everything is bold, then nothing is important. Embolden just required items, then denote what bold means (like we do in other checklists).

One-pager Checklists.

- At the top, show the version number and updated date.
- At the bottom of any and every (one-pager), always include the web page link that explains that item.

Quotes

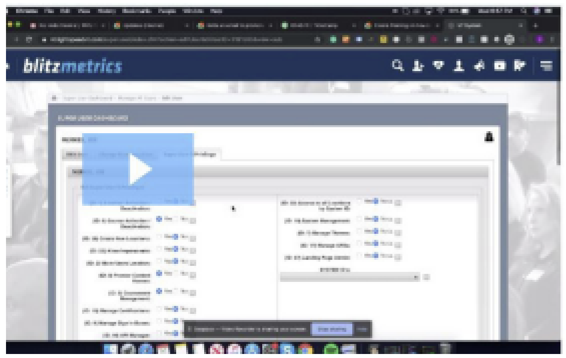
- Always include the quoted person's headshot before his or her quote is introduced.
- Italicize quotes.
- Most of the time, quotes should be a lighter color than the body text, typically gray.
- Never forget the open and end quotation marks.

Conclusion page

- Make sure the person on the conclusion page (AKA the "What's next" page) makes sense to be there. This should be the author 99% of the time.

List of videos

Video: The power of checklists (12:11)



Video: How to upload a course to LightSpeed VT (02:21)

Video: Marketing technology flow (01:15:55)

What's Next?

As part of a sequence, leave something for the viewer to go to next.

You have completed the Course Builder Guide!

Now take the quiz to earn the badge!
Course Builder Quiz.

Then move on to the Dashboard.