YOUR AGENCY LAUNCH CHECKLIST

PRINT ME

The following is designed to print out and be used!

I made this checklist for the people who are anxious to get to the "meat & potatoes" and want to know exactly what to do without having to go through my long-winded videos. ☺

IN A NUTSHELL

1. Accept that a digital marketing agency based on SaaS is one of the fastest & best business models out there
2. Accept that you are going to learn how to be a business owner - not a freelancer, not an employee - a real business owner that drives revenue and scales up your agency until you have the time and money to do whatever you want
3. Accept that in order to grow your business and realize your goals, you need to help other business owners realize their goals - and you're going to help them through a massively leveraged business model
4. Choose a niche and come up with an offer that will genuinely serve that niche (your entire business will be based on those two things)
5. Get your first sale… and then your next… and then your next
6. Fulfill the services you sell via software, systems, and staff
7. Scale your business to whatever level you want

WHY?

"Entrepreneurship is living a few years of your life like most people won't, so that you can spend the rest of your life like most people can't"

TIMELINE

In each section, I have the days that it should take to get the listed items completed.

These aren't arbitrary numbers - they provide an actual timeline that you should follow to get results as fast as possible. If there's something being held up that's out of your control (a logo design, for example), just move on to the next step.

If you have any further questions, or would like to have personalized guidance from me, then consider taking the full course available at:
https://clonemydigitalbusiness.com/enroll/

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GETTING STARTED
Day 1

Go through these first few steps as quickly as you can. Go fast!

- ☐ Embrace speed - successful people move quickly
- ☐ Ignore all doubts you have and get started fast
- ☐ Write out (or type out) your motivation. Why are you interested in starting this business? Answer this with something more specific than "to have more money" - get as specific as you can
- ☐ Embrace the idea that you're not a freelancer nor an employee but a real business owner of a highly leveraged business model
- ☐ Embrace the idea that you really can make more than $6K a month, even in your first month
- ☐ Complete this sentence: "I want to make ($XXXXX+/mo) so that I can (fill in personally motivating thing for you)
- ☐ List out the amount of money you would like to make in your first month
- ☐ List out the amount of money you would like to make in your second month
- ☐ List out the amount of money you would like to make in the following months – you can be as detailed as you wish but end with an annual goal (include numbers on both the business and your net income)

SETUP & SERVICES
Day 2 - Day 5

This portion gets you started by establishing your business services, messaging & branding, website, and so forth. The goal is to move quickly to hurry and get to making sales.

- ☐ Do niche research
- ☐ Choose a niche - identify your perfect clientele
- ☐ Research how much people in your niche make on an average job/project/patient/customer/etc
- ☐ Decide right now you will stay true to your niche and not take on anyone who needs help "online" - successful people say no more than they say yes
- ☐ Research the competition - get online and look up keywords, industries, & services
- ☐ Create a no-brainer offer & USP & elevator pitch
- ☐ Create your packages (based on what services you choose to offer) - get specific
- ☐ Establish your pricing
- ☐ Write up your one page business plan
    - ☐ What is your company name?

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- [ ] Who is your target audience?
- [ ] What's your initial core offer?
- [ ] What additional services do you provide (what problems do you solve)?
- [ ] How much do you charge?
- [ ] What is your monthly revenue goal?
- [ ] How many new or repeat clients do you need to achieve this goal?
- [ ] How do you get new clients?
- [ ] How will you fulfill your services? SaaS, team members, etc?
- [ ] Who are the other key players of your team? (list their names and titles)
- [ ] Name & brand your business
  - [ ] Write out at least 10 names, pick one & run with it
  - [ ] Decide your colors & "feel"
  - [ ] Get a logo done (use 99designs, Upwork, or Fiverr) – don't do it yourself unless you're a graphic designer
- [ ] Set up shop offline
  - [ ] DBA to start (or equivalent outside of USA)
  - [ ] Business checking account & credit card
  - [ ] Order first batch of business cards… maybe
- [ ] Set up shop online
  - [ ] Stripe… (maybe PayPal)
  - [ ] Quickbooks or Freshbooks
  - [ ] GoHighLevel account
  - [ ] Buy your domain name (use a domain registrar like GoDaddy)
  - [ ] Buy your hosting (use a big host like SiteGround)
  - [ ] Setup G suite and business email (or just route via Gmail…)
  - [ ] Website - use Wordpress and get a theme from ThemeForest - your host should have a 1-click Wordpress install
    - [ ] Import theme demo content and change up to your business
    - [ ] Create a homepage, about page, services page, & contact page to start
  - [ ] Social media platforms (LinkedIn, LinkedIn business page, FB business page, YouTube channel, and any others if they relate to your niche)

SALES
Day 5 - Day 14

This portion is where you start making sales - the lifeblood of your business. If you're not making sales, you don't have a business.

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- ☐ Decide that sales is your friend - it's the one skill that you should master to scale your business
- ☐ Decide if you're going to market or advertise (or both!)
- ☐ Kickstart your own marketing efforts
- ☐ If you're advertising, set up your platforms (especially YouTube)
- ☐ Set up your sales funnel with the following:
  - ☐ GoHighLevel Snapshot
  - ☐ Landing page
  - ☐ Videos sales letter (use pattern)
  - ☐ Calendar
  - ☐ Application/qualification
  - ☐ Automated email/text messages
- ☐ Write out your sales script - practice, practice, practice
- ☐ Write out your sales proposal/game plan or use PandaDocs, etc
- ☐ Write out a list of 10 businesses that you can reach out to with your offer - do it

=== > NOTE: Do NOT proceed with this list unless you get a sale - nothing else in this list matters until AFTER you get a sale. If you reach Day 14 and you don't yet have a sale, go back through this section. If you're stuck, ask me!

SYSTEMS
Day 5 - Day 14

Once you have your first sale or two come in, at the same time, you need to make sure you document everything and create systems in order for others to do the work for you.

- ☐ Create SOP's for each part of your business - especially sales & services
- ☐ Set up Asana (or Monday or whatever)
  - ☐ Load up SOP's
  - ☐ Set up client folders
- ☐ Set up Google Drive
- ☐ Set up Zoom, Loom, ZipMessage, or others as needed…
- ☐ Create SOP for onboarding
  - ☐ Re-sell the client
  - ☐ Setting expectations
  - ☐ Getting client info/access to accounts
  - ☐ Send out welcome swag or card or whatever
- ☐ Customize or buy a snapshot - "SaaS everything"

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STAFFING
Day 14+

Getting a team in place to do the work for you is vital to getting on top of your business. You need to hire, train, and lead your team members to help you in all facets of your agency.

- ☐ Before hiring, first consider what you can SaaS or white label (i.e. - try Extendly or HLProTools first)
- ☐ Create a company org chart with you as owner then create a general manager position with manager positions also in sales, services/operations, & finance
- ☐ Create a job description for your first necessary job
- ☐ Go to Upwork.com, OnlineJobs.ph, etc and post your job
- ☐ Interview your top 3 candidates & hire 1 but keep the other two on a short-list for when you need them in the future - start them off on a part-time basis with the expectation of them doing more soon
- ☐ Really take time to train your first team member & refine your systems and make sure they can operate independently of you as soon as possible (use Asana to manage everything - if you're concerned about tracking everything, consider using HubStaff)
- ☐ As soon as revenue and need justifies it, hire more team members

SCALING-UP
Day 30+

Once you have sales coming in and a team and systems in place, it's time to scale-up. This section is all about refining your processes so that you can handle 5 or 500 clients while the work to you remains the same. In other words, this is how you make more money while working less.

- ☐ Do an 80/20 analysis of your own time - make sure you're focused on money-making activities & outsourcing the rest to GoHighLevel or your team members
- ☐ Refine your systems - key metrics include: your ad spend, sales calls & close ratio, onboarding process, services fulfillment, and retention - whenever possible, swap out human effort with software
- ☐ Refine your clients - be choosy and fire the bad ones
- ☐ Set up process (via GoHighLevel) to get testimonials & referrals
- ☐ Partner with similar businesses to drive revenue - even offer to white label for them

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- ☐ Expand your expertise in your niche
- ☐ Consider expanding to other related and non-related niches
- ☐ Consider going full time with your business once you have at least 3 months of savings - enough to pay for your monthly bills - if you have a significant other, be sure they're on the same page
- ☐ Scale to the moon as fast as possible!

FURTHER TRAINING

If you want to go deeper in your knowledge and start a digital marketing agency, like this week, then consider going through the training that I offer.

But don't think of it as training. Think of it like an operation manual - like you just bought a franchise, and the corporate headquarters is giving you a massive binder on how everything is to be run.

Plus, it's based on what I still do myself in my own agency… that I've had since 2010! Yes, I still practice what I preach, over a decade later.

It's why I literally call it, "Clone My Business!"

Learn more here at CloneMyDigitalBusiness.com/enroll

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