

# WICKED SMART

## VOLUME 4

PRESENTED BY





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# INTRODUCTION

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“Wicked Smart!” was originally born at one of the early Traffic & Conversion Summits.

Back in those days Ryan Deiss and Perry Belcher were the only presenters for the entire event, and legend has it that after 3 days of training they had run out of content to present! Undeterred, they knew they could count on the brilliance that existed in the audience. They asked the marketers in attendance to share the best business breakthroughs they’d experienced that year. As it turned out, attendees instantly loved this session, and it was later adopted by WarRoom.

So, for a number of years, WarRoom members have been invited to showcase and share their best business breakthroughs, explaining what they did, along with proof of the result. Other members are then encouraged to adapt the same concept to use in their own business.

As you’ll see in this book, Wicked Smart ideas are often simple concepts

that make you think: “Why didn’t I think of that?!” They also reveal the

brilliance of the business owners that came up with the original concept, who then tested it and shared it with their fellow entrepreneurs.

The key to using Wicked Smart ideas in your business is to think in terms of adapting, rather than adopting. When you read each idea, it’s unlikely that the industry will match your own. However, if you consider how to adapt the same concept for your own topic, often there’s a way to do that.

Of course, since many of these strategies revolve either around the Internet or specific third-party tools and resources, these elements are subject to change at any time. If the strategy no longer works exactly as described in the book, try to read between the lines to understand the principle behind it. If a particular tool that’s mentioned is no longer available, often you can find alternatives via a simple Google search.

So get creative, and enjoy the wisdom from the many WarRoom members who generously contributed and shared the following 27 Wicked Smart ideas from their businesses.

By the way, if you’re curious about what WarRoom is and how it can benefit your business, take a look at [www.JoinWR.com](http://www.JoinWR.com)

# EARLY BIRD

GETS THE DOLLA DOLLA BILLS Y'ALL

## Result

10X'd Previous Years Black  
Friday Results + 33% Increase  
In Average Order Value

## Contributor

Bernardo Feitosa



“THIS CAMPAIGN  
RAN TO 15K ACTIVE  
EMAILS AND NEXT  
YEAR **HE IS ON  
TARGET TO HIT  
150K ACTIVE  
EMAILS.**”

## How to Implement:

Do you already have your Black Friday Promo ready to launch months before Black Friday?

Bernardo did so by using a Secret “Early Bird VIP” Optin Campaign.

He got the typical “yes” before the buy, but here’s the twist...

**What Not To Do:** DO NOT Announce the Sale

## “Announcement” Campaign:

*Hey there,*

*For those of you in the states, I hope you had a wonderful Thanksgiving yesterday!*

*This is our first ever Black Friday sale and we*

are so excited to see how it goes

In honor of this [Black Friday Date], everything in our shop is at least 24% off for the next 24 hours.

Until midnight [time zone] enjoy at least 24% off the following:

[Insert discounted products here]

I think that covers it!

Now is the time to get your hands on some goodies that will prime your subconscious mind to make this year your best year yet - prices start as low as [insert \$ amount].

Click here NOW to start your shopping!

Enjoy!

This "Announcement" email resulted in \$11.5K with \$587 spend.

The following Black Friday Bernardo twisted this approach with a RSVP (optin) campaign.

When his list joins the "Early Bird VIP" list, they receive the secret promo code that gets them a further discount than what is advertised on the website.

### **"Early Bird" Campaign:**

Hey there,

Yesterday I sent you an invite to our Black Friday Sale, and it seems like you haven't taken action yet --

This is going to be our biggest sale of the year starting on Friday.

Click here to claim your deep discount invitation >>

Our Black Friday Sale is SO massive that we only want our most active community members to know about our biggest discounts.

When you RSVP, you will get early admissions to the Black Friday Sale... AND... a Secret Bonus Promo Code packed with even more opportunities to save BIG!

The Bonus Promo Code gets you the biggest discount on everything in our online store. These discounts are not available ANYWHERE else online or off, and may never be this low again.

Also, we are releasing a record-breaking number of [company] products for ALL NEW topics including...

[insert products here]

So, when you RSVP, you're going to cut to the front of the line and be the first to find out about these new releases... PLUS... you lock in our lowest prices ever before everyone else.

Here's how you cut to the front of the line:

Click here and accept your discount invitation >>

You will be added to our exclusive list of community members where you will get special, behind the scenes preview of what's to come and how special these discounts will really be.

Then, after you finish your Thanksgiving dinner, you will receive your Bonus Promo Code -- getting you access to the biggest discounts of the year before everyone else!

So, click here NOW and RSVP while

*it's' fresh on your mind. Then take some time to "Window Shop" the online store and make a WISH LIST with everything that catches your eye.*

*All the best,*

In addition to the copy, Bernardo added a code "teaser" inside the email to create a "I'm Missing Out" mindset to his entire list.



This generated 1,100+ optins that "Window-Shopped" for their Wish Lists.



As a follow-up sequence, Bernardo sent out **targeted SMS messages** to the optin list that created urgency to snag their discounted products.

*Hey, this is Bernardo with Grace Space Hypnosis. Just reaching out because I noticed you signed up for the Black Friday discounts, but we didn't see your order yet from your email on file... Do you need any help? - Remember this sale ends at midnight tonight so whatever I can do to help you get the extra special discounts you signed up for, just let me know. Our team is on Standby! 🙏*

Why did this work for Bernardo?

- He had customers that were excited to buy and anxiously waiting for the email.
- He knew how his Black Friday Sale will do a week before it actually went live (including the exact amount of people with the intent of purchase).
- This made his clients feel special, part of a secret club who knew more than the "regular" customer.
- His campaign stood out from all other Black Friday sales out there.
- He had his clients rehearse the act of buying through "Window-Shopping" (this is good if you have lost of products, especially e-commerce, creating a wish list and being ready to buy).
- He generated unique follow-ups for those who said they wanted the deal, but never actually bought it

This campaign ran to 15K active emails and next year he is on target to hit 150K active emails. This resulted in over 3000 items purchased by 900 people with a total of \$100,600 in sales - just for a Black Friday Promo.



# AI'S GARBAGE IN, GARBAGE OUT

**Result** Found The Campaign & Ad That Actually Performs on Facebook

**Contributor** Ritchie Hale



## How to Implement:

When launching a campaign with multiple ads on Facebook, the approvals will occur at different times. During this approval process, Facebook's AI engine will use the campaign optimization to take the first set of data that was approved and start optimizing that data.

In Ritchie's case, Facebook's AI was swinging all of the traffic and reach towards the ad that was underperforming. The approval gap was only a couple of hours, but the ad that was approved first was sorted as "top performing" because the other ads had not been approved yet, therefore sending all the traction to the underperforming ad.

Ritchie hacked this AI and found that once your ad is approved, switch the ad off in the queue until ALL ads have been approved. Once they've all been approved, switch them all on and boom - level playing field for all of your ads in your campaign.

This raised Ritchie's CPAs and reach across all of his ads.

**"A LEVEL  
PLAYING  
FIELD FOR  
ALL OF YOUR  
ADS IN YOUR  
CAMPAIGN."**

# MO' MONEY, LESS PROBLEMS

## Result

Increased Conversion Rate  
From 7% to 22% + Decreased  
Cost Per Lead to \$5 with  
Mobile Optimization

## Contributor

Phil Smith



“RESTRUCTURE YOUR  
PAGE TO MIRROR  
**WHAT IS NEEDED IN  
TODAY’S AGE.**”

## How to Implement:

Have you ever wondered why your traffic is so low on your offer?

Well, Phil figured out that 9 times out of those 10, it is the mobile optimization that was shot.

He took his old landing page with a long form and optimized it for mobile viewers.

Today, most of the traffic is driven from mobile. Stop messing with the copy, and don't mess with the offer. Use more buttons and less drop down, long forms. Restructure your page to mirror what is needed in today's age - easy accessibility and quick mobile reach.

# MATCHMAKERS INDEED

LEAD GEN

## Result

More Clients & Higher  
Quality Leads That Match  
Our Exact Avatar

## Contributor

Vinnie Fisher



## How to Implement:

Who do you know that wants what you actually have?

Vinnie Fisher, the Founder and CEO of Fully Accountable which provides outsourced accounting and finance for ecommerce and digital companies, clarified his avatar.

By identifying his clear avatar, he found out who his hand raisers are within his niche to be able to qualify new candidates for jobs in his business.

Starting with a quick Google Alert search, he searched for eCommerce

**“BY IDENTIFYING HIS  
CLEAR AVATAR, HE  
FOUND OUT WHO HIS  
HAND RAISERS ARE.”**

accounting jobs and over 2,000+ companies came up. With those inquiries, he told his marketing team to segment those applications to those who work for Vinnie, the hand raisers - the ones he would call on, that actually qualified for his position and identify the ones who would want to actually work for Fully Accountable. His team segmented the list down to 673 different companies that fit the criteria Vinnie was looking for.

Vinnie and his team then created their own resume and applied for the different jobs so that when Vinnie and his team called the company, they knew

for those companies that are actually doing the service and submitted himself to do the job.

By going through the full application process, he business development rep calls Vinnie's team, they are put right through to the decision maker.

**“THIS IS NOW THE  
#1 THING THAT  
IS HELPING FULLY  
ACCOUNTABLE  
GROW.”**

they had a reason for why Vinnie was applying for the position.

This is now the #1 thing that is helping Fully Accountable grow.

It is more of the B2B Application process, but with the service Vinnie was providing, someone is looking to hire a full-time employee to handle that service. So, Vinnie went out and looked

# EXAMPLE 2



2680 W Market St. Fairlawn, OH 44333 | [www.fullyaccountable.com](http://www.fullyaccountable.com) | (216)-810-4705

## Our Company

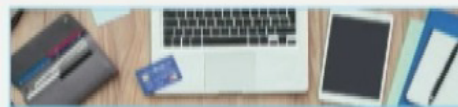
- Fully Accountable is a full-service accounting firm offering outsourced accounting and finance for eCommerce and digital companies. We process internal transactions daily like an internal accounting team.
- Our accountants help you receive the timely, proactive, forward-thinking feedback that is needed to make the right business decisions.

## Services



### Digital Accounting

- You'll have access to Daily Stats, Outsourced Bookkeeping, Management Reports, Cash Flow Analysis, Merchant Services, Accountable Payable Outsourcing, and KPI's that our accounting experts develop for you.
- Your accountant can make decisions that will allow your company to grow and to help your business succeed.
- Our accounting experts produce budgets, forecasts, and projections that are relevant to your industry.



### eCommerce Accounting

- Our eCommerce accounting and bookkeepers are well versed in implementing fully managed solutions to small business owners and organizations.
- You'll get to work with a team of accounting and financial experts who offer a wide range of strategic financial solutions to help your business succeed.
- We will focus on your daily accounting, record keeping, tax preparation, and financial reports.



### Finance Department

- All your financial needs will be covered, including bookkeeping, payroll processing, tax accounting, forecasting.
- Partner with a highly trained team that provides the best-in-class financial and accounting services to help your business grow, while always knowing your numbers.
- Achieve profitable growth and detailed financial benchmarking and outsourced infrastructure services.



### CFO Advisory Services

- We have an entire team of experienced CFO's that are equipped to help make better decisions for you company.
- You will be informed and guided with customized solutions by our experienced CFO's who utilize the financial data compiled by our accounting and finance team.
- You will have the potential to establish a growth strategy, increase profitability, obtain financing or attract investors.

# DEEP, SOLO, POCKETS

MEDIA

**Result** Generated \$48,026 in Revenue  
+ 4,317 Leads From \$2,000 in  
Spend Using “Solo Ads”

**Contributor** Brittney Lynch



**“A LEVEL PLAYING  
FIELD FOR ALL OF  
YOUR ADS IN YOUR  
CAMPAIGN.”**

## How to Implement:

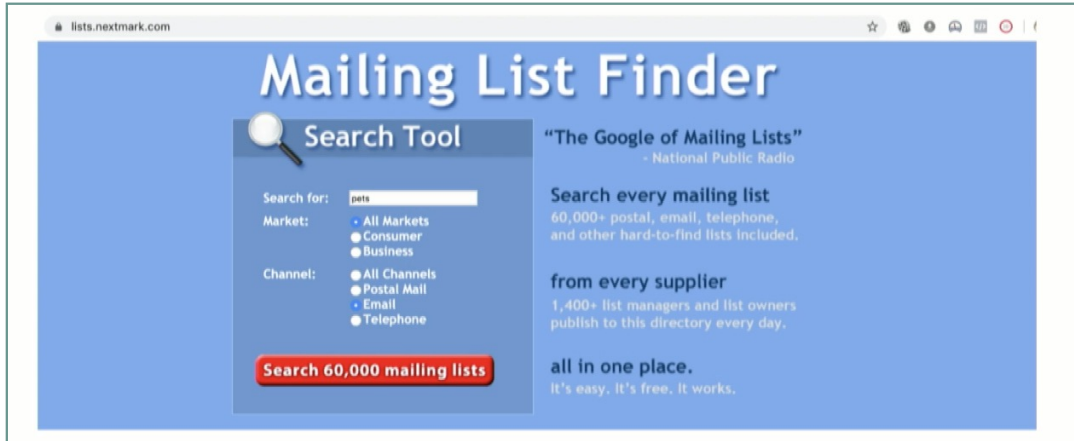
Brittney Lynch has a subscription business in the craft space and focused on Solo Ads to scale her offers really fast with little spend.

A Solow Ad is an email ad broadcast that you sent to an email list in your niche that you do not own. For example, if Ryan Deiss had a craft list, you could paid him money to send an email, as Ryan himself, to his list. This is automatically a warm referral that generates warmer traffic.

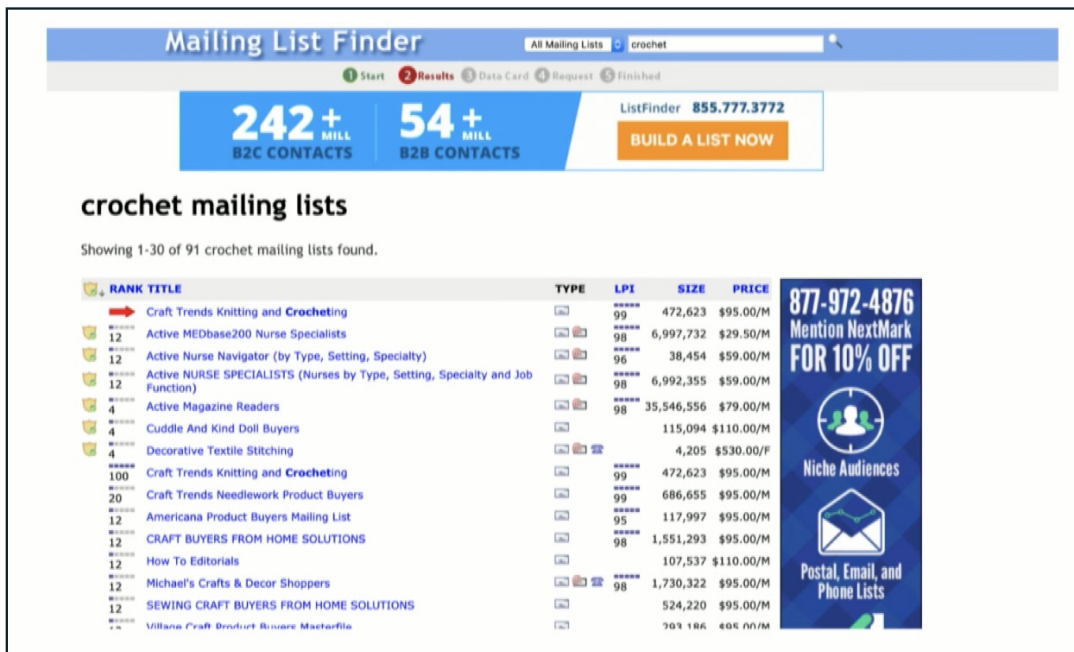
On a simpler note, you can pay someone to promote your product or service like an affiliate without paying them the affiliate commission.

It's a great way to get more leverage with your offer when you know it's a great offer that's converting.

**PRO TIP:** Brittney found the best way to find Solo Ads is lists.nextmark.com (not to BUY, just to FIND). This is a massive database of people who are selling ad space in the newsletters in hundreds of different categories.



Even through the most narrow categories, you can find a great number of results and opportunities.



# SECRETS

## DON'T MAKE FRIENDS

### Result

100's of Thousands of \$\$\$  
Saved When Entering A New  
Business By Not Wasting Cost,  
Time, Or Resources

### Contributor

Daniel Matishak



“THINGS THAT  
WOULD COST  
100,000 OF  
THOUSANDS OF  
DOLLARS AND  
MONTHS OF  
TRIAL AND ERROR,  
**ULTIMATELY  
ROUNDED TO  
\$250 IN TOTAL. ”**

### How to Implement:

The most badass strategy that Daniel found was this strategy that will guarantee you 1+ Billion Dollars.

Daniel learned from experience as he wasted so much time, money, and resources guessing and testing how or why his competitors do what they do. So, why not ask them directly?

Daniel has an 8-figure astrology website that found out that his competitors, who have 9-figure websites, are in the “pay-per-minute” advisory business.

So to get from 8 to 9 figures, Daniel went on LinkedIn and searched for his competitors names and searched for their past employees.

A couple of things Daniel was looking for specifically...



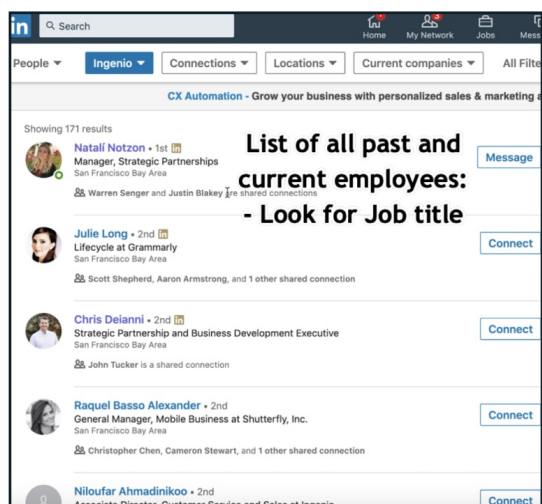
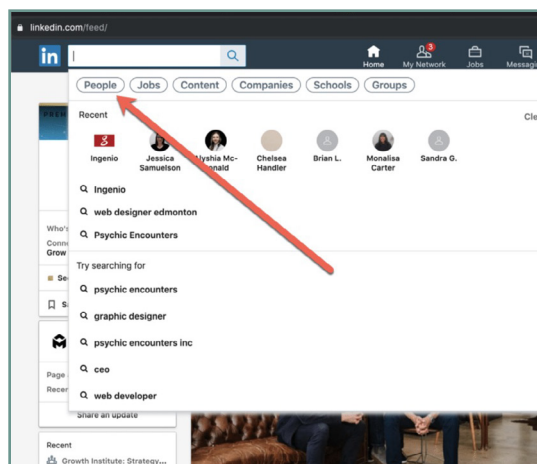
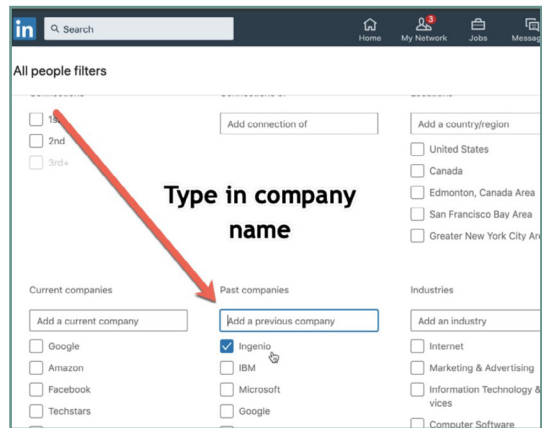
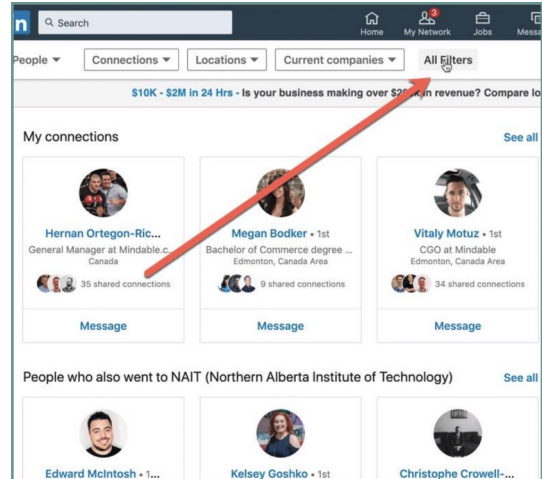
- How long ago did they work for the company/organization?
- What position(s) did they hold?
- How long did they work for the company/organization?

By retrieving this information, Daniel has talked to CMO's, CTO's, and VP's who have told him LTV models, retention models, conversion metrics, tech stacks, and the list goes on.

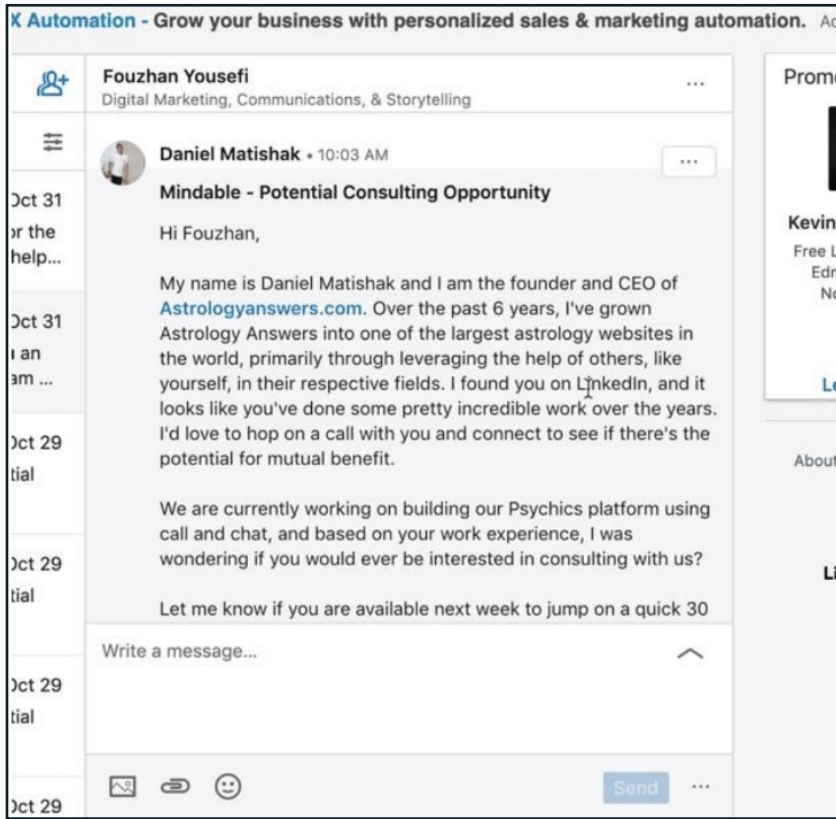
Things that would cost 100,000 of thousands of dollars and months of trial and error, ultimately rounded to \$250 in total.

Daniel used this strategy before entering a new area of business and wanted to identify who the top players are in the industry he wanted to enter.

Within LinkedIn, Daniel went to People > Filters > Past Companies > Ingenio (or company you are looking for) > which then gives you a list of all past and current employees within that company. From there, Daniel was able to search for the job title and look at the specific criteria in that job title for classification (questions mentioned above).



From there, Daniel and his team just sent the qualified person an email that gives the person some background about Daniel and why he is reaching out.



# THE HIDDEN FUNNEL

EMAIL

## Result

6 month old Campaign Still Scaling | Current Annual Run Rate: \$8M Net Revenue; \$1.5M Profit Contribution; 44% ROAS (Profit Contribution Return on Ad Spend)

## Contributor

Thomas Shipley



## How to Implement:

How do you double your campaign profitability?

Here's Thomas' secret to real profitability...

Attrition and optimizing the profit per lead, not just per customer.

Case Study: KervaViatin.com → launched: May 2019

Case Study - Campaign Results:

- \$8,194,056 Net Revenue
- \$1,557,486 Profit Contribution
- 44% ROAS

**“ATTRITION AND OPTIMIZING THE PROFIT PER LEAD, NOT JUST PER CUSTOMER.”**

LIMITED TIME OFFER: JUST \$10 TODAY + FREE SHIPPING

**KERANIQUE**  
THE WOMEN'S HAIR GROWTH EXPERTS

HAIR HEALTH REAL RESULTS BENEFITS THE DIFFERENCE REVIEWS [TRY IT FOR \\$10](#)

# Grow Thick, Healthy, Beautiful Hair!

Your thinning hair may be caused by your diet. Here's the breakthrough solution to get nature's most vital and powerful nutrients that your scalp needs to grow stronger, longer, shinier hair.

[TRY IT FOR JUST \\$10](#)

4.6 Star out of 5  
Verified ULTA Reviews

120-Day Beautiful Hair Guarantee

HAIR & SCALP HEALTH

Thomas figured out what the problem was for KeraViatin.com:

- He does not trust 3rd Party Attribution (e.g. Facebook, Google).
- He can only really measure last click attribution.
- He knows he generates incremental revenue, but if he only used last click, he would kill campaigns for too low of an ROI.

If he can solve these problems... he can optimize profit per lead, not just profit per customer on a campaign.

So, as of May 2019, Thomas launched a new offer KeraViatin.com on Facebook & Google SEM. The campaign optimization looked as follows:

- June 2019: Launched Abandoned Cart Email Campaign
- July 2019: Launched Abandoned Cart Email Campaign
- July 2019: Started Testing Upsells & Upsell Flow (USB & Full Pay)

**“THOMAS FIGURED OUT WHAT THE PROBLEM WAS.”**

Here are the results (numbers):

Calendar Month	Campaign	FTF Net	Orders	Profit Contr (excl CS)	% Incr Profit	Media	ROAS	CPO	CLV	Profit Per Order (Excl CS)
June	Email Internal	\$ 7,976	69	\$ 4,670		\$ -	N/A	\$ -	\$ 68	\$ 68
	Organic	\$ 6,905	84	\$ 3,574		\$ -	N/A	\$ -	\$ 43	\$ 43
	SEM	\$ 2,233	22	\$ 1,274		\$ -	N/A	\$ -	\$ 58	\$ 58
	Social Media	\$ 106,032	995	\$ 8,842		\$ 48,363	18.3%	\$ 49	\$ 57	\$ 9
<b>June Total</b>		<b>\$ 123,146</b>	<b>1,170</b>	<b>\$ 18,360</b>		<b>\$ 48,363</b>	<b>38.0%</b>	<b>\$ 41</b>	<b>\$ 57</b>	<b>\$ 16</b>
May	Email Internal	\$ 8,967	59	\$ 5,628		\$ -	N/A	\$ -	\$ 95	\$ 95
	Organic	\$ 926	31	\$ 134		\$ -	N/A	\$ -	\$ 4	\$ 4
	SEM	\$ 60	1	\$ 19		\$ -	N/A	\$ -	\$ 19	\$ 19
	Social Media	\$ 23,257	1,015	\$ (12,298)		\$ 14,026	-87.7%	\$ 14	\$ 2	\$ (12)
<b>May Total</b>		<b>\$ 33,211</b>	<b>1,106</b>	<b>\$ (6,517)</b>		<b>\$ 14,026</b>	<b>-46.5%</b>	<b>\$ 13</b>	<b>\$ 7</b>	<b>\$ (6)</b>

Calendar Month	Campaign	FTF Net	Orders	Profit Contr (excl CS)	% Incr Profit	Media	ROAS	CPO	CLV	Profit Per Order (Excl CS)
October	Email Internal	\$ 34,503	254	\$ 22,069	39%	\$ -	N/A	\$ -	\$ 87	\$ 87
	Organic	\$ 47,017	316	\$ 30,096	53%	\$ -	N/A	\$ -	\$ 95	\$ 95
	Outbound	\$ 50,291	393	\$ 15,159	27%	\$ 12,969	116.9%	\$ 33	\$ 72	\$ 39
	SEM	\$ 16,499	123	\$ 6,158	11%	\$ 4,346	141.7%	\$ 35	\$ 85	\$ 50
	Social Media	\$ 534,528	3,779	\$ 56,310		\$ 276,867	20.3%	\$ 73	\$ 88	\$ 15
<b>October Total</b>		<b>\$ 682,838</b>	<b>4,865</b>	<b>\$ 129,790</b>	<b>130%</b>	<b>\$ 294,182</b>	<b>44.1%</b>	<b>\$ 60</b>	<b>\$ 87</b>	<b>\$ 27</b>
September	Email Internal	\$ 31,695	277	\$ 18,576	49%	\$ -	N/A	\$ -	\$ 67	\$ 67
	Organic	\$ 54,877	447	\$ 32,092	84%	\$ -	N/A	\$ -	\$ 72	\$ 72
	Outbound	\$ 41,265	324	\$ 12,828	34%	\$ 10,692	120.0%	\$ 33	\$ 73	\$ 40
	SEM	\$ 14,590	136	\$ 5,255	14%	\$ 3,141	167.3%	\$ 23	\$ 62	\$ 39
	Social Media	\$ 555,433	4,560	\$ 38,221		\$ 282,470	13.5%	\$ 62	\$ 70	\$ 8
<b>September Total</b>		<b>\$ 697,860</b>	<b>5,744</b>	<b>\$ 106,972</b>	<b>180%</b>	<b>\$ 296,303</b>	<b>36.1%</b>	<b>\$ 52</b>	<b>\$ 70</b>	<b>\$ 19</b>
August	Email Internal	\$ 2,819	27	\$ 1,586	2%	\$ -	N/A	\$ -	\$ 59	\$ 59
	Organic	\$ 59,335	548	\$ 33,146	46%	\$ -	N/A	\$ -	\$ 60	\$ 60
	Outbound	\$ 22,431	184	\$ 7,026	10%	\$ 6,072	115.7%	\$ 33	\$ 71	\$ 38
	SEM	\$ 16,475	161	\$ 3,335	5%	\$ 5,956	56.0%	\$ 37	\$ 58	\$ 21
	Social Media	\$ 647,001	5,871	\$ 71,980		\$ 291,580	24.7%	\$ 50	\$ 62	\$ 12
<b>August Total</b>		<b>\$ 748,061</b>	<b>6,791</b>	<b>\$ 117,073</b>	<b>63%</b>	<b>\$ 303,608</b>	<b>38.6%</b>	<b>\$ 45</b>	<b>\$ 62</b>	<b>\$ 17</b>
July	Email Internal	\$ 21,686	199	\$ 12,497	33%	\$ -	N/A	\$ -	\$ 63	\$ 63
	Organic	\$ 28,748	295	\$ 15,054	40%	\$ -	N/A	\$ -	\$ 51	\$ 51
	Outbound	\$ 10,189	86	\$ 2,857	8%	\$ 2,838	100.7%	\$ 33	\$ 66	\$ 33
	SEM	\$ 7,603	76	\$ 4,176	11%	\$ -	N/A	\$ -	\$ 55	\$ 55
	Social Media	\$ 340,981	3,346	\$ 37,559		\$ 142,444	26.4%	\$ 43	\$ 54	\$ 11
<b>July Total</b>		<b>\$ 409,207</b>	<b>4,002</b>	<b>\$ 72,143</b>	<b>92%</b>	<b>\$ 145,282</b>	<b>49.7%</b>	<b>\$ 36</b>	<b>\$ 54</b>	<b>\$ 18</b>
June	Email Internal	\$ 7,976	69	\$ 4,670		\$ -	N/A	\$ -	\$ 68	\$ 68

Here was the Hidden Profit:

October	Profit Per Social Media Order	\$14.90
	Incremeal Profit / SM Order	<b>\$15.20</b>
	Total Profit /Order	\$30.10
	% Lift in Profit	<b>102%</b>
	ROAS	40.4%
	Customer Service Exp.	\$ (16,055)
September	Profit Per Social Media Order	\$8.38
	Incremeal Profit / SM Order	<b>\$10.92</b>
	Total Profit /Social Media Order	\$19.30
	% Lift in Profit	<b>130%</b>
	ROAS	30.8%
	Customer Service Exp.	\$ (18,955)
August	Profit Per Social Media Order	\$12.26
	Incremeal Profit / SM Order	<b>\$3.86</b>
	Total Profit /Social Media Order	\$16.12
	% Lift in Profit	<b>32%</b>
	ROAS	31.8%
	Customer Service Exp.	\$ (22,410)

Thomas learned a couple of lessons from launching these campaigns.

- Reinforced: whoever can afford to pay the most per lead due to maximizing profit per lead can spend more media.
- Quantified the Incremental Contribution from Other Channels (Double Profitability) which was good baseline data for his main Keranique offer
- Maximizing Contribution per order in the funnel through upsells and cross sells is still key to his profitability
- Based on measuring incremental sales, he has been able to optimize profit per lead from outbound and email
- Outbound can lift your profitability 25% (Note: Philippines call center)

- Lift in KeraViatin Amazon sales (Growth from \$8k to \$25k)
  - Lift in retail sales based on online ads
  - Email onboarding series where Thomas re-sold customer who did not take cross-sells
  - Incremental Profit from non-KeraViatin promotional emails to leads and customers
- 

## “THOMAS LEARNED A COUPLE OF LESSONS FROM LAUNCHING THESE CAMPAIGNS.”

Here are some other determined Incremental Income that was NOT measured:

- Outbound Order Confirmation calls where Thomas re-sold his customers who did not take cross-sells (Doubles Outbound Profitability)

# CONVERSION CITY

**Result**

Gained \$126,900  
Additional Revenue In  
the Last 8 Months

**Contributor**

Jim Dew

**How to Implement:**

100% conversions to on-going clients with 1 change + 1 incentive - How can you do it?

Jim's answer is pricing and conversion.

How are you pricing?

But better yet, how are you presenting your pricing to your clients?

When Jim starts a new relationship with a new client, Jim has this saying, "we like to date our clients before we get married". Now, before you get too weirded out, Jim has a point.

So, the "dating phase" is what he calls the "Family Office Assessment". This assessment has 218 different qualifications that they review for 1-2 months with their clients such as legal, taxes, insurance documents, etc.

**"JIM'S ANSWER  
IS PRICING AND  
CONVERSION."**

The way Jim sections his pricing is through the personal wealth management review, the business wealth management review, and the business evaluation that rounded to \$2,500 to do all 3 reviews.

Reason for the low ball price on the initial reviews (dating phase) is so that Jim can get his new clients in the process and then they will want to hire Jim.

Well, from a conversation with Roland Frasier, Roland mentioned that Jim would lose money on that phase and no one will see the value in the process. Roland also mentioned that a good price for what Jim is offering is between \$10-20k.

Jim took Roland's advice and bumped up his pricing. After a couple of months, he realized that his clients were taking months to kick start and Jim's team were continuously following up -- business wasn't moving as fast as Jim had wanted it to.

**"JIM WAS ABLE TO GET MORE CLIENTS AND GET THESE CLIENTS KICK STARTED RIGHT OFF THE BAT."**

After some more research Jim decided to keep the pricing change but also added an incentive to get his clients going since the price tag is larger. So, if the client gets started right away, Jim will kick the review pricing back to \$7,200.

Jim was able to get more clients and get these clients kick started right off the bat.

Jim and his team then decoupled the way they were getting paid. As most wealth managers get paid through commissions on products and assets under management, Jim and his team do not take commissions and they decouple while only getting paid on a monthly, fixed-fee basis.

So, Jim takes the \$7,200 and divides that by 12 months to get \$600/mo from each client.

By making his price change, Jim took the money he made and bought a car for his wife, Mimi, through the business. He received 27 family office assessments and an additional \$126,900 in revenue from the last 8 months with the review price change. Out of those assessments, he received 100% conversions to on-going clients and 100% retention.

Not to mention, under Section 179 in the Bonus Depreciation under the Tax Cuts And Jobs Act, Jim was able to write everything off.

---



# INSERT CASH HERE

## Result

Gained Member Attrition  
Rate + \$100K Through A  
“Simple” Newsletter

## Contributor

Craig Collins



## How to Implement:

Craig has a Fitness and Nutrition online membership site with about 10,000 members currently.

In previous years, Craig has had huge hits to revenue due to the decline of demand during the holiday seasons.

So, this year Craig said nope and created a membership hot piece that would invite his members to stick around and stick around for a longer period of time. That something was a physical 12-page, full-color newsletter to include in his membership. In addition to making a great selling point to not only keep his current members happy, but sell the newsletter as a separate membership for \$9.99/mo for non-paying members.

After spending the total cost of \$13k to print and ship, Craig decided to have his members pay for those costs instead of pulling out of his pocket.

So, here comes the magic.

Craig added a marketing insert to the newsletter which was a discount code for one of his hottest products. Based on the marketing insert results alone, Craig and his team made enough money to cover the printing and shipping costs as well as gained an additional \$100k during his “dipped” season.

“HERE  
COMES  
THE  
MAGIC.”

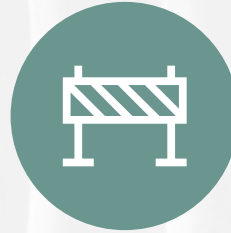
# OVERCOMING OBSTACLES IN ADVANCE

## Result

Went From 60-70% to Over 85-90% Conversion Rate And Found the 3 Reasons Why People Don't Hire

## Contributor

John Preston



“JOHN USES A  
3-STEP METHOD  
THAT GETS A  
**GUARANTEE**  
**FROM HIS CLIENTS**  
**EVERY TIME.”**

## How to Implement:

John uses a 3-step method that gets a guarantee from his clients every time.

The biggest obstacle that came up with John's prospective clients is that they would either say “Yes, we want to hire you” or some would say “Ehh, we need to think about it” and never fully commit.

Usually when someone says they need to think about what you are offering, John believes 9 times out of ten, those prospective clients are looking for more information that you have not provided. So, the first thing you need to do to ensure John's strategy works is to make sure what you're offering or bringing to the table, whether that is a service or a product, is crystal

clear in how it is going to help the person.

There are two more obstacles that John encountered:

1. People wanted a discount.
2. People wanted to know if they're getting the best or cheapest price.

So, the big hitter for John was "why don't we move our close to the front, instead of our pitch?"

The close that is now the pitch: "We've evaluated your situation and based on that, you need what we have. And it's going to cost you \$5k."

This is letting your client know that what you have to offer is exactly what they need.

John then proceeds to tell his clients, "However, at the end of this discussion, I am going to give you a \$600 discount. Here is why: My hourly rate is \$400/hr - If I have to meet with you again for an hour and a half, you would be paying again for my time. But if you make your decision today, then you are going to save the \$600 off of the \$5k fee."

John then follows up with this statement with, "Now, a lot of people like to think about this. You do not have to make the decision today, you will just have to pay the \$600 instead of gaining the discount. But I want you to take a week to think about it."

So, John offers the agreement of having the client sign up today to secure the discount, but gives them a week to ponder their decision. After giving them that option, he closes with this unbelievable guarantee that locks down the client:

"Once you've thought about it, and decide that you'd like to hire us, and you hear from ANYONE that you get what we are offering for a better price, you get to keep the whole thing for free. It's yours."

That's where you hit the important points: You let them know that you are getting the least expensive option in the market, otherwise, if they find one that is better, they get to keep yours for free.

By putting it all up front and giving the big guarantee, John's conversion rate went up by 20% and generated about \$500,000 in revenue for his business.

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# RETOOL & REFUEL

**Result** Loss of Underperforming Staff,  
Motivated Managers and  
Directors Leading to Personal  
Responsibility & Control

**Contributor** Sarah Jenkins



**“THEY FEEL  
HEARD, AND  
MORE OFTEN THAN  
NOT, THEY LIKE TO  
REPORT BACK TO  
SARAH WITH THE  
RESULTS OF HOW  
WELL THEY HAVE  
DONE.”**

## How to Implement:

It all started with her kids. First thing in the morning, Sarah asks her kids questions that get their brains working and thinking about their day.

Here is an example of one of those working questions:

- What do you want to be today?
  - Kids Answer: Kind
- Are you going to be kind to someone? Is someone going to be kind to you?

At the end of their day, Sarah would get

the kids home and ask another set of questions:

- Were you kind to someone?
- What happened?
- How did that make you feel?
- Was someone unkind to you?
- What happened?
- How did that make you feel?
- How are we going to handle that to get a better result next time?

Sarah has now started asking these questions of her staff.

- What are your responsibilities for the day?
- What do you want out of your staff today?
- What are your goals?
- What are their goals?

Sarah has found that the more that she asks her upper management staff questions like these, the more she has found they tend to be happier, they feel heard, and more often than not, they like to report back to Sarah with the results of how well they have done.

Sarah also ensures that she follows up with those responses and results which, in return, made for a boost of confidence in her staff as well as their appreciation for Sarah and the company as a whole.

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# GIVE ME A BREAK

EMAIL

## Result

Receivables Were Normal  
During Global Pandemic,  
Collected 60-90 Day Invoices,  
& Positive Client Feedback

## Contributor

Brad Ball



“HAVING AN  
IMMEDIATE,  
POSITIVE RESPONSE  
AFFIRMED FOR  
BRAD THAT **GOOD  
COMMUNICATION  
IS KEY.**”

## How to Implement:

Like most people, Brad had two main questions when Covid hit:

- How can his agency maintain cash flow, collect on old invoices, and build stronger relationships?
- Anticipating people slow paying, how can his agency not drop receivables, especially in the weeks where everything hit the fan?

In other words, he wanted to be proactive. So he wrote this collections email.

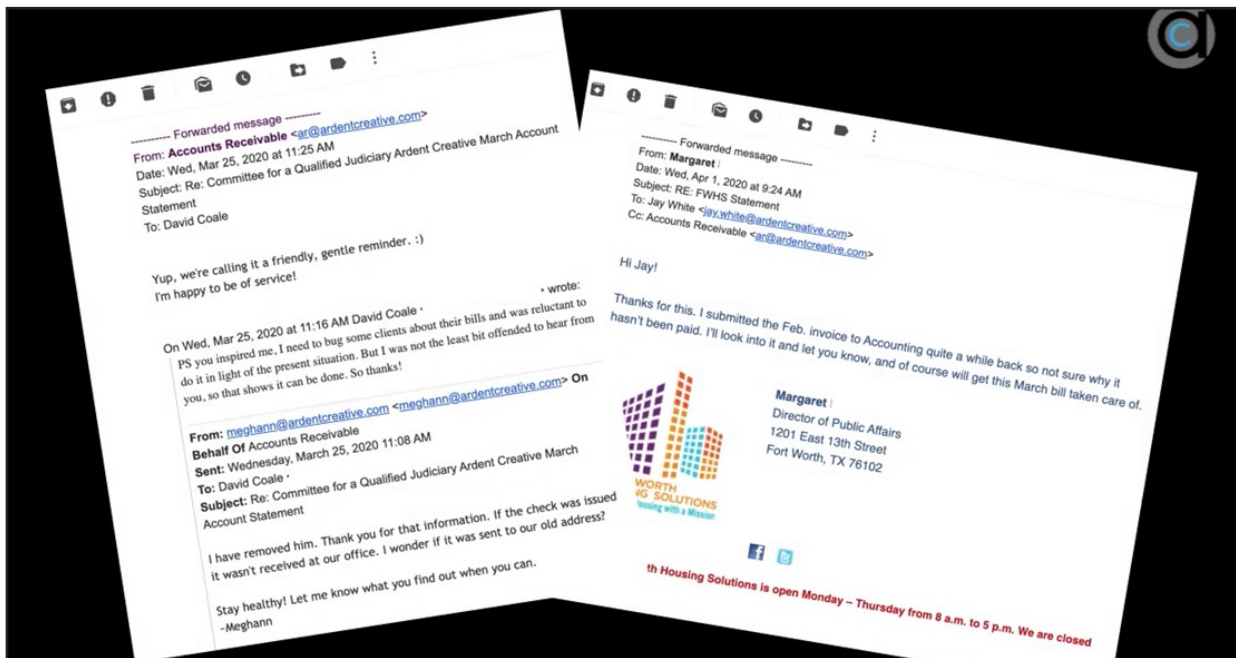
The last couple of weeks have been a whirlwind for everyone. We understand paying bills has changed and it can be a little more difficult to even get to the office to write a check. As a simple reminder, all bills can be paid at [www.ardentcreative.com/payment](http://www.ardentcreative.com/payment).

As with many businesses right now, we are working through getting jobs done while managing cash flow and payments. We are doing our best to keep our bills up-to-date with printers and other vendors. We hope you are able to do the same. As businesses, doing our part will ensure we all can come out of this stronger with a bright future.

Brad gave it to his account managers and everyone sent it from their personal emails. Within minutes of sending our first email out, he received responses that not only promised to look into why their bill hadn't been paid but also one person who replied, "P.S. you inspired me. I needed to bug some clients about their bills and was reluctant to do so, but this did not offend me in the least and shows it can be done."

Having an immediate, positive response affirmed for Brad that good communication is key. Because of these emails, receivables were normal, even with Covid. Brad's agency collected several 60-90 day invoices and even a couple big clients that ended up paying about \$80K of the receivables that came in.

The biggest thing was not trying to hide from sending what could feel like a "dirty" email, asking for money, but acknowledging the circumstances and being flexible: Brad's agency changed some of their terms to cut people a break where needed.



# MODULARIZING THE EVERGREEN WEBINAR

**Result** Making More Relevant Changes  
During Height of Change

**Contributor** Wesley Rocha



“SO HE MADE  
A WEBINAR ALL  
ABOUT COVID.  
**AND IT TANKED.”**

## How to Implement:

At the beginning of Covid, Wesley Rocha set up to update his webinar—everyone was going to be talking about Covid, so if he wanted his webinar to appear current it would make sense to bring it up.

So he made a webinar all about Covid. And it tanked.

After some advice from Ryan, Richard, and Perry, Wesley decided what he actually needed to do was modularize. Instead of having to go in and re-record from scratch because a gift is



out of stock, or, in this case, mentioning a current event like COVID, Wesley could change just one piece to address it, and let the rest of the webinar run exactly the same. Normally, getting a new webinar up and running takes about three to four days, maybe a week, but with Wesley now crafting a webinar with building blocks, he can get it up significantly faster.

## “WESLEY RECOMMENDS A MODULAR STRATEGY FOR MORE THAN JUST WEBINARS.”

His webinar retention increased 10% from his March Covid webinar to the modularize version in April. However, Wesley recommends a modular strategy for more than just webinars.

The main idea is setting yourself up so you test new strategies and ideas by just changing one piece. If you can modularize your webinar, you can modularize your marketing, whether it be a sales video or a funnel. You can completely change your marketing around so your customer feels like it's relevant to them right now without having to spend time building a completely new funnel or process.

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# HOW TO GET AI TO DO PEOPLE WORK

**Result** Hot Leads Don't Fall Through Cracks, Saves Sales Reps Hours of Sorting, and Saves 1000s of Dollars of Sending Leads to 3rd Party

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**Contributor** Wesley Rocha

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“IT’S A QUESTION AS OLD AS TIME: **HOW DO YOU GET THINGS DONE BETTER AND FASTER?”**

## How to Implement:

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It’s a question as old as time: how do you get things done better and faster?

For Wesley, when it came to sorting thousands of messages, the answer was artificial intelligence. Specifically, Wesley was hosting a number of webinars, which meant his team had a lot of chats coming in, but they also had text message sequences and other messages going out. They were getting thousands of webinar chats every month and hundreds of text message replies, and all of them were people that needed something; someone would have to go through them and direct them to their appropriate follow up.

Sorting messages wasn't just a priority because it was time consuming; he also had a third party company that followed up with leads and set schedules for the sales team. This meant paying per lead, regardless of how qualified. In other words, it would be really expensive to funnel every message through sales. Sorting the messages could potentially save Wesley thousands of dollars per month though gets real expensive when you're dealing with thousands of leads.

## "THE SPECIFIC PROCESS WESLEY SETUP **HAS KEPT HIS HOT LEADS FROM FALLING THROUGH THE CRACKS."**

Wesley went looking for a solution and found MonkeyLearn (<https://monkeylearn.com/how-it-works/>), a software that makes artificial intelligence much easier than he expected. He imported his texts and webinar chats (it could also do email, support tickets, social media and more), and then began training it. The process for that looked like reviewing the data and creating tags. The more messages he tagged the more the AI could guess what the next tag might be. Even better, now that it was trained he could connect it directly to Zapier. Now when a message comes in he has MonkeyLearn classify it. For example, MonkeyLearn could get a message that says, "me and my team are looking at your options, very interested"

and have a 95% confidence score that this is a warm lead. It's going to tag it as a warm lead, and then Zapier can trigger an action, such as initiating a campaign in Infusionsoft or assigning the contact to sales reps.

There are lots of ways to get creative with MonkeyLearn and Zapier specifically, but the specific process Wesley setup has kept his hot leads from falling through the cracks, save the sales leads time they would be using sorting through messages, and saved thousands of dollars by no longer paying for unqualified leads.

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# LET'S HAVE A CHAT, SHALL WE?

CONVERSIONS

## Result

More Personal & Engaging  
Conversations That Led to More  
Fulfilling Relationships

## Contributor

Andrew Voirol



**"BUT FAST AND  
FURIOUS WASN'T  
ALWAYS GOING TO  
WORK."**

## How to Implement:

Andrew Voirol could never decide whether he should be waiting or not waiting. Going fast and furious in his business led to burning more fuel, more repairs, more stress, more money lost and a lot less life. He'd been in and out of the ER, the hospital for about three years, and his business was working—the money was coming in—but it was not long lasting. There were other times, like in a crisis moment or when you have so many ideas you can't figure out what to throw out, where he just couldn't wait. But fast and furious wasn't always going to work.

So instead, Andrew took a shot at being well paced and patient. He found that he was actually meeting much better people that actually cared about what they were doing and what he was doing for them; they actually appreciated the pause. He set a slower pace for his clients and his own approach to marketing, at one point even purposely taking two hours before replying to anything.

**“HE SET A SLOWER PACE FOR HIS CLIENTS AND HIS OWN APPROACH TO MARKETING. ”**

This led to Andrew seeing more beauty in things: people, design, even negotiation tactics. It also meant that he made stronger connections with people that led to more fulfilling relationships, more sustained business, and providing more—and better—services. and my luck being more well sustained, but also the services we were providing were more, were better.

For many people the pace of life has in some ways slowed down, but in a lot of ways it has gotten more frantic. Andrew very intentionally set a slower pace and found that other people are beginning to mirror that. Which means he’s also attracting the kind of people who want that.

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# LEAVE IT TO THE AI

**Result** "Left On the Table Money"  
Can Now Be Saved

**Contributor** Daniel Aruaga



"WHAT'S MORE  
UP AND COMING  
THAN **ARTIFICIAL  
INTELLIGENCE?**"

## How to Implement:

Daniel Aruaga has a fund where he invests in SaaS companies, which means he has a keen eye for the up and coming. What's more up and coming than artificial intelligence?

Daniel and his team created their own artificial intelligence, AdGuru, to solve a problem they were having: there was an account they were working on where they had spent \$82,000 on it, and made \$235,000. As far as they knew it was optimized, and most people would say they were doing pretty good. However, they wanted to find out if they were leaving money on the table and they couldn't find any easy way to find out. They created an AI that gets their campaign

and their accounts, and analyzes them in order to make recommendations on how you should spend your budget. It specifically looks at two categories: how you should spend your budget and where that money should go, down to the percentage that should be in each part of your funnel.

## “THEY WANTED TO FIND OUT IF THEY WERE LEAVING MONEY ON THE TABLE.”

Daniel’s team was starting to scale and spend big budgets, and it took a lot of time to analyze and break down campaigns. AdGuru pulled numbers that it might take a whole team to sift through, and analyzed them on its own, not just at the campaign level, but on the ad set level as well.

In their manually optimized account, they made a total of \$235,000. What their artificial intelligence told them is that they have \$94,000 left on the table. It isn’t always that much money they’re missing out on, but after using the program for a couple of months, Daniel was able to see that on average they’re leaving anywhere from \$5,000 to \$10,000 on the table.

It may not be possible to recover all of that potential, but as an agency or someone who’s running Facebook ads, even if you can recover 50% of that, that’s a big deal. Every \$5,000 helps.

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# STARTUP SUBSIDY SNEAKINESS

**Result** Created a Referral Partnership  
With An Existing Business + New  
Business = Recycled Revenue of  
\$160,000 to Fund the Startup

**Contributor** Amanda Dobson



## How to Implement:

Building Multiple Brands during COVID-19.

By implementing a subsidy sneaky technique, Amanda created a program of something she called her “reduce, reuse, and recycle plan”.

Reduce - reduce the friction of creating start ups by using the same tech-stack across all of the different businesses.

Reuse - reused a lot of the same sequences across all of the platforms.

Recycle - recycled all of the money back to her company → this was key!

Since she was using the same tech platform across all of these companies, every time she started a new brand, Amanda would sign up for the partner program for each tech stack she was using. As long as nothing breached the terms and conditions of

Thanks to Perry’s referral, Amanda uses Fix Creative and Wow Support for all of her customer service needs. Every time she would set up a new account with each of these agencies, she would get a referral fee. So, with these referral fees and partnerships fees she was receiving from all of the tech stacks, she would recycle this money to fund the new start ups that came into her pipeline.

She was able to come up with new products, new formulators, and subsidize all it through the revenue that is coming in from the partnership deals with the tech stack she was going to use anyway.



# STORY PITCH - ONE, TWO, PUNCH

**Result**      Soft Pitch + Hard Pitch To Lift 45%

**Contributor**      Dean Horine



## How to Implement:

Familiar with split testing different email marketing styles such as story, straight pitch, and even newsletters. Based on a couple of head-to-head tests, Dean found that he got a 45% lift when his team sent a relevant story in the morning and followed up with a hard pitch for an offer in the evening. So he started running two emails a day. Some people think that's a lot, but Dean has seen that this one simple step just gave such a boost he was shocked. Especially since in a head-to-head test, it loses: the morning story loses to the afternoon pitch but together they're complimentary.

An example of this strategy working for Dean is in selling a musical instrument called a clave. Because it resembles a nunchuck, when riots were kind of going on, they made a play on nunchucks matched with a lot of raw material of news stories where people might be looking for self defense. He puts a soft pitch in the first email, which is the news article, and they still make sales off it. In the afternoon, the second email is the true offer and gets about 70% of the sales for that day. In tests where both emails were offers, it's been about 50/50 in terms of sales, but when the first email is a story and soft pitch, the second email performs significantly better. For the strategy to work best, there's got to be some story going on; if it's on people's minds, it's relevant, it works really well.

**"IF IT'S ON  
PEOPLE'S  
MINDS, IT'S  
RELEVANT."**

# REMOTE SNUGGLE CULTURE-BUILDER

**Result** Bringing the Company Together  
During the Hard Times

**Contributor** Brad Ball



## How to Implement:

Brad Ball had an agency of about 30 employees in-house in an office and one question after COVID hit: how do you continue to build your culture?

For Brad, it all started with something Ryan said about a year ago, about weekly newsletters or emails to your employees in-house and how it had worked at DigitalMarketer. But Brad is not a writer; he's an artist. Just the time to go in and create a weekly email was daunting. On top of that, Brad wasn't even sure if it was going to move the needle. But Brad decided to give it a shot anyway. He used that weekly email to reinforce core values, inform employees where they were at as a company, but also any other things that they might need to hear.

It certainly wasn't without its challenges. There were hot topics they couldn't avoid discussing that came with a lot of emotions and they had to figure out how to communicate positively in a tense environment. And that's where Brad made it smart. He started highlighting specific projects and specific people. Everybody wanted to see their work highlighted in a certain way, because amidst COVID, things got forgotten, they get buried in their work, and they're stressed out. Celebrating them in the newsletter created a culture of encouragement, more of a connection within the company through personal connections and personal ties. Now, this is where the greater things happen. Brad started getting emails from employees about highlighting other employees. The most recent example was an email he got where an employee called out every team member. He took the email that she wrote and put it into the weekly email which, one, validated that she was doing something great, and two, highlighted other employees in a very personal way. The one surprise result? On top of the other benefits, writing the weekly newsletter has made Brad a better writer.

# OUTSOURCED MANAGER MASTERY

**Result** Amazing Management Level Staff  
For Pennies On the Dollar

**Contributor** Josh Hadley



## How to Implement:

Josh Hadley and his wife own Hadley Designs, a stationary lifestyle brand, and all of their employees are contractors. A few are in the US, but most are overseas, mostly in the Philippines. Everybody knows that you can go get a good virtual assistant (VA) in the Philippines, but what sets Josh's team apart is that a lot of his management level staff is actually there in the Philippines as well.

Josh has a process for finding top talent, that's so clear he has a VA run it. He creates job posts in his two preferred places—onlinejobs.ph and Upwork— and inserts a hidden task in the list of the job description. For example, "in your cover letter, when you reply to this job post, make sure you say I'm COO material." People start responding and then immediately a VA is checking to see if they meet the qualifications. Specifically, did they respond with "I'm COO material?" It makes it easy to weed out the people who can't follow instructions, and then the next

"JOSH HAS A  
PROCESS FOR  
FINDING TOP  
TALENT, **THAT'S SO  
CLEAR HE HAS A  
VA RUN IT."**

step is an assessment, which the VA sends. This is where they start really whittling it down, going through the funnel, and finding good talent. Josh uses the company Criteria Corp for the three assessments he gives: an aptitude test to measure their cognitive abilities, personality test to best match them to the job position, and a basic skills test to measure their English speaking ability. The best part of this process for Josh is that at this point the algorithm does all the work; in this case for our project manager, it whittled down the applicants from over 500 to the 167 people that actually completed the assessment. Then he narrows it down to the top five and has the VA set up the 30 minute Zoom interviews.

He selects a candidate and that's how he ends up with amazing management level staff for pennies on the dollar.

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“THE BEST PART ABOUT THIS PROCESS FOR JOSH IS THAT **AT THIS POINT THE ALGORITHM DOES ALL THE WORK.**”

In the interviews, Josh is looking for a pattern of success in their previous experiences. He gets there by asking just a few questions: What did you do in that job? Who is your manager? What is his or her name? He also asks how their previous managers would rate their success to compare with the manager's responses. He sends the manager an email to get their responses and then factors everything together in the final choice: the tests, the interview, and the manager's feedback.

# THE TOP 20 STRATEGY

<b>Result</b>	Getting What You Want In 20 Days
<b>Contributor</b>	Jen Gottlieb



## How to Implement:

Jen Gottlieb made one big promise: you can accomplish anything you want by using her Top 20 Tool. As the owner of a PR agency usually teaches it to people looking to get in the media. But it can work with making sales, with getting investors, with getting connected to influencers, even finding a husband or a wife.

Start by writing your biggest challenge or opportunity at the top of a sheet of paper and then listing at least 20 people who can help you get there. This is not limited to your business network—People you went to college or high school with, your kid’s friend’s parents, absolutely anybody that you know, that can possibly help you with the thing that you want or connect you to somebody that can help you with the thing that you want. Even if you think you’ll never reach out to them.

“JEN GOTTLIEB  
MADE ONE  
BIG PROMISE:  
**YOU CAN  
ACCOMPLISH  
ANYTHING  
YOU WANT  
BY USING HER  
TOP 20 TOOL.**”

**Complete the table below with a list of 20 people and score them from (1-10) on how influential they are and how likely are they to help you.**

	<b>NAME</b>	<b>HOW INFLUENTIAL?</b>	<b>HOW LIKELY TO HELP?</b>	<b>TOTAL</b>
1				
2				
3				
4				
5				
6				
7				
8				

Next, you would rank them from 1 to 10 by how influential they would be in getting you to your goal—not just how many followers they have but how much they can actually make a difference. In the next column, rank them from 1 to 10 on how likely they are to help. Then total the numbers to get a prioritized list of people and reach out to those at the top of your list. If this is somebody that maybe you met for 5.10 seconds, you don't even really know them that well, you've never really done anything with them, but you kind of know them, and they're really influential, put their name down anyway with a 1 or 2 on how likely they are to help you. Add those two numbers together and then sort those scores with the highest scores are at the top, and the lowest scores are at the bottom. Those top scorers are the people that you're going to reach out to first

because they're likely to help you, they're influential, and they're your friends. You're going to reach out to the people on the top of the list and you're going to flat out ask them for help.

People at the bottom of the list, people with the lower scores, these are people that are not very likely to help you, so Jen recommends instead of asking them for help, you should do one thing to provide value to that person. Don't ask them what they need help with, just provide something. Even if you only reach out to one person on that list each day, Jen guarantees you will get what you want in 20 days and strengthened connections to boot.

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# SUPPORT PAGE REDESIGN

**Result** 9% Decrease in Ticket Volume;  
Response Time Increased by 70%; 13%  
Increase in Customer Satisfaction

**Contributor** Bonnie Hargrove



## How to Implement:

**Website referenced:** <https://home.kartra.com/contact>

As the Director of Customer Success for Genesis Digital, Bonnie Hargrove is familiar with the most common problems for tech companies customer support: high ticket volumes, long response times, consistent increases in employee headcount, and low customer satisfaction. Genesis Digital was no exception; they had a 21-hour response time, and Bonnie was tossing around some solutions. They could do a couple of different things like hire eight people to cover all of the backlog and hope to catch up or extend the chat hours, but sometimes those tech tickets are a little too complicated for that. Instead, Bonnie identified a simple solution, which was just having fewer tickets.

To accomplish that, she decided to recreate the customer journey by redesigning the support page and helping the customer to self-educate before contacting their support team as their first option. Originally, Bonnie's customers were told to contact them as their very first step. They weren't going to try to do anything else besides contact support and training was the afterthought. So what Bonnie did is change the journey. Her team refreshed the theme to increase interaction with the customer a little bit more. The customer was told to check out the resources first, right at the top. It no longer said contact us, it said, "You should do the education." The results of letting customers self-educate themselves and making support the backup was a 9% decrease in ticket volume. That might not seem like a lot, but that 9% reduction meant the response time decreased by 70%—they went from 21 hours to under five hours. It also translated into an immediate increase in our customer satisfaction score. And on top of ALL that, Bonnie saved about \$265,000 by not jumping straight to hiring more staff.

# CROWDSOURCED WEBINARS

**Result** Increased Revenue In 1  
month by 40%

**Contributor** Adam Lyons



## How to Implement:

Everyone's trying to add automation and optimize their processes to keep up with the rest of the world, but it can be hard to remember that your customers are regular people who probably don't like change as much as you do. Adam was feeling this in his own business, and decided to redesign the concept of an evergreen webinar. He creates a completely new, 3-hour webinar every month to stay relevant and leverage it for content creation, and he has a Q&A at the end to answer questions.

With the standard evergreen webinars, people see the same seminar over and over again. With Adam's three-hour seminars, he keeps them relevant by having his audience choose from a list of 30 topics using a Google form. Adam does some research, and creates bullet points to teach the webinar. He gets permission at the start to give a sales pitch at the end, and his simple sales process is to ask them to decide which of four people they are:

1. Hated it
2. Got the help they needed
3. Amazing and want help or
4. Amazing, but I don't think I can afford it

For Adam, the purpose of the webinar isn't selling, but marketing. He can get an audience to stay to the end because of that; they know they're turning up for a completely free webinar that's packed with actual content. But most importantly, this small change increased his revenue by 40%.



# THE FTI SHUFFLE

ACQUISITIONS

**Result** Gained \$1.6M in Equity

**Contributor** Matt Bodnar



## How to Implement:

Matt Bodnar's company, Fresh Technology, is a SaaS business in the restaurant food world. They were approached by Phood, a scrappy startup with a good idea, that came to Fresh Technology wanting to raise money. Matt offered them something better. Fresh Technology integrations, a platform, a large network and partners—all things in the space that Phood didn't have access to. The offer Matt made was, "you give us 40% of your company, and we will introduce you to all of our customers, we'll introduce you to all of our vendors and strategic relationships and we'll let you piggyback off of our tech infrastructure." They negotiated down to 20% and Matt made them a partner: he put their logo on the Fresh Technology website and made some introductions, as you can see on a bit of the contract below:

"MATT WAS ESSENTIALLY ABLE TO MONETIZE IT WITHOUT ACTUALLY HAVING TO MONETIZE IT."

### Exhibit A

#### Products and Services to be Provided by the Parties

1. ToGo and Fresh are to supply Phood with access to their existing and future APIs and code base as necessary for Phood to fulfill its services. While Fresh Phood is an equity partner in Phood, Fresh and ToGo will not charge Phood any unnecessary costs unless such costs are otherwise specified and agreed upon by the Parties and attached to this agreement.
2. If new custom development work is requested by Phood of Fresh or ToGo, Fresh or ToGo and Phood will agree to a separate scope of work for each custom development project and attach each scope of work to this document. Custom development may include additional fees Fresh or ToGo. Fees for custom development work will be \$135 per hour. Fees for each development project will be agreed to by all Parties prior to Fresh or ToGo beginning the customer development work.
3. ToGo and Fresh will supply Phood with introductions to its partner businesses such as universities, restaurants, campus card processors, etc., ("FP Partners") as requested by Phood and agreed to by the Parties.
4. In the event Phood provides delivery services to FP Partners, Phood may negotiate, with FP's assistance, and collect delivery fees from FP Partners. Phood will retain all delivery fees unless otherwise agreed upon by the Parties and attached to this agreement.
5. The Parties will place notice of their partnership on their respective websites and include Phood in their respective marketing campaigns when appropriate.
6. Fresh and ToGo agree that Phood shall be their preferred delivery integration partner. As they are able, Fresh and ToGo will promote Phood as its preferred delivery solution to partner restaurants where Phood is available to deliver.

### Agreement for Services in Exchange for Shares of Stock

**Parties:** ToGo Technologies, LLC and its subsidiaries and affiliates ('ToGo')  
Fresh Technology, LLC and its subsidiaries and affiliates ('Fresh')  
Fresh Phood, LLC ('FP')  
Phood Inc. ('Phood')  
(each a "Party" and, collectively, the "Parties")

**Overview** ToGo and Fresh wish to make their code, platform, and services available to Phood in exchange for shares of stock in Phood being awarded to FP.

Whereas Fresh is a successful digital restaurant management software business and ToGo is a successful online ordering business with knowledge in certain aspects of the restaurant management software, delivery and online ordering business, has developed products and solutions for online ordering, and has developed partnerships and integrations with other companies including Fresh Hospitality.

Whereas FP is owned by ToGo and Fresh and has been formed to hold the shares of Phood granted pursuant to this agreement.

Whereas Phood is a new startup wishing to mold the future of peer to peer hospitality and food delivery.

Whereas the parties have recognized the potential for a partnership and wish to enter into this Agreement for Services in Exchange for Shares of Stock (the "Agreement").

Therefore, the Parties have agreed as follows:

1. ToGo and Fresh will provide access to its platform, code, and services to Phood as set forth in Exhibit A attached hereto and incorporated herein
2. FP will receive a total of 192,187 shares of Phood common stock.
  - a. Phood shall provide the documents required to issue the shares within a reasonable time after executing this agreement.
  - b. Phood will sell these shares at the par value of \$0.0001 per share.
  - c. The shares will initially be subject to repurchase at par value. Each year after the shares are issued, on the anniversary of their issuance, 1/3 of the shares shall be released from this repurchase right until such time as all shares are no longer subject to repurchase or have been repurchased.

- d. Phood shall only exercise this repurchase right if ToGo or Fresh fail to provide the services, introductions, support, or products specified in Exhibit A available to Phood or, in the case of items requiring mutual agreement, if ToGo or Fresh repeatedly fails to provide such agreement.
- 3. If Phood files for bankruptcy, the Parties agree that any and all source code provided by ToGo or Fresh is and shall be the property of its respective owner and shall be returned to such owner prior to initiating any voluntary bankruptcy.
- 4. Phood or its employees, directors, managers, members, officers or agents agree to not use, copy or recreate all source code provided by ToGo or Fresh unless agreed to by all Parties.
- 5. ToGo or Fresh will be allowed to appoint one individual to a board seat on Phood's board.
  - a. The individual appointed to the board shall be Shaun Shankel.

In exchange, Matt received 192,000 shares of the company, which was the agreed upon 20%. He did not provide any cash, and actually still got paid for the development work that he did to support them. To reiterate: Fresh Technology, Matt's company, got paid for Phood to give them 20% of their company.

**“HE DID NOT PROVIDE ANY CASH, AND ACTUALLY STILL GOT PAID FOR THE DEVELOPMENT WORK HE DID TO SUPPORT THEM.”**

Because of the value that Matt and his technology integrations were able to add, Phood was able to raise a \$750,000 seed round at a \$4 million pre-money valuation. Doing the math really simply, that's \$950,000 of equity value that was created basically just by letting them piggyback off of Matt's relationships, but that's not the whole story. About 18 months later they raised a series A round,

and they valued that stock at \$1 million, so we got \$1 million of credit towards the valuation of Fresh Technology for putting that strategic partnership together, because it was an investment on their balance sheet. Matt was essentially able to monetize it without *actually* having to monetize it. If you're wondering where they're at now, Phood made it into the Techstars New York class in March 2020, and they raised another \$2 million at a \$10 million valuation. Matt Bodnar's shares have been slightly diluted since then, but his current equity value is about \$1.6 million.

# THE PRE-DONE COACHING TEMPLATE

**Result**

Generated a Total of  
\$187K of Bonus Income

**Contributor**

Adam Lyons



“HE CAN  
MAKE **A FULL  
SITE IN JUST  
TWO HOURS**  
BECAUSE 90%  
OF THE COPY  
IS ALREADY  
THERE.”

**How to Implement:**

Adam Lyons was frustrated that he often had to spend hours and hours writing out a piece of copy for a new offer, and had a thought: “What if I just did it once correctly and created a template that I could just copy and build something in two hours?” Over the past year, Adam developed [thecoachingtemplate.com](https://thecoachingtemplate.com), modeled after the best performing promotional pieces he’s seen, based on some of the most converting high ticket offers and a bunch of experts that helped him work out these templates. Adam uses these templates to quickly create different sales promotion tools for selling an eBook, masterclass, program, to get people to join your community, or visit your blog. So quickly, in fact, he can make a full site in just two hours because 90% of the copy is already there.



DIRECT MAIL

# RIDE-ALONG BRC WORTH \$1K EACH

## Result

Turned a Low Offer to a High-Ticket Offer That Gets a Couple of Extra G's in the Bank!

## Contributor

Trey Lewellen



“THE ANSWER FOR TREY WAS TO DO A **LIFETIME MEMBERSHIP FOR \$1,000.**”

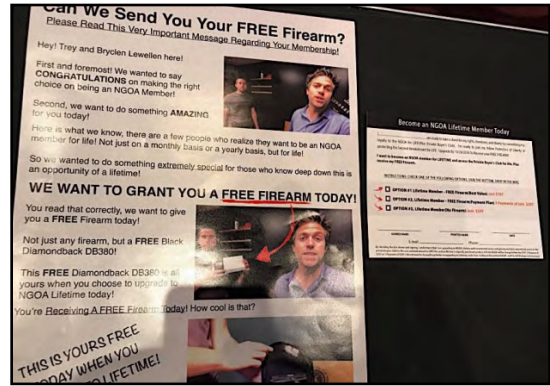
## How to Implement:

Trey Lewellen was selling a membership for \$19 a month, and wondered how he could effortlessly turn that into a high-ticket offer. The answer for Trey was to do a lifetime membership for \$1,000; he recorded a quick video on his iPhone, then had it transcribed and took screenshots of that video to create his two-page sales letter. What actually sets Trey's strategy apart is a little card that goes with every single product that they send out when someone purchases from his website. This little postcard, along with the sales letter, goes in every single package Trey sends out advertising this \$1,000 lifetime membership, and every time someone puts it in the mail to return to him with a box checked to purchase a lifetime membership, he pays 55 cents, and

gets 1,000 dollars in value. The best part for Trey is that there's no resistance when it comes to people signing the card. They're people that have already purchased something, they already have their credit card on file, and their information is already in his CRM, so all they have to do is check that box, sign

“THE BEST PART FOR TREY IS THAT THERE IS NO RESISTANCE WHEN IT COMES TO PEOPLE SIGNING THE CARD.”

it, and put their email address on it. Trey receives anywhere between two and five postcards a day from this, so we receive \$2,000 to \$5,000 in checks, but the most important part is that he's only paying to receive the postcard back; He doesn't have to pay to send them because their going out with orders that are already paid for. For Trey, this is for a membership, but he can think of plenty of other usages: if you have a catalog, if you have other products you're looking to sell, if you're doing agency models, if you're doing coaching, no matter what it all works.



# FIXING FACEBOOK

MEDIA

**Result**    Scored All Lost Facebook Campaigns

**Contributor**    Kasim Aslam



“KASIM ASLAM  
HAS HEARD A  
LOT ABOUT THE  
RISING COST OF  
FACEBOOK ADS—  
**AND HE WANTS  
TO FIX IT.”**

## How to Implement:

Kasim Aslam has heard a lot about the rising cost of Facebook ads—and he wants to fix it. The main problem as Kasim sees it is that the iOS 14 update requires users to opt-in for tracking. At last count, 89% of people have not opted in, which means the majority of Facebook traffic is flying blind. Facebook literally cannot see what those users are doing. If they haven't opted in, they do get one conversion event, but it's aggregated. They can't see you on an individual user base, which just means that Facebook, which is a machine learning mechanism that's optimized towards an individual action, isn't giving the opportunity to optimize. The way to fix this is Facebook's conversion API. Facebook gives you the opportunity to pipe information back



to Facebook, because even though Facebook can't see what a user is doing, once a user converts, you're able to take the Facebook Click ID, which is tucked inside the URL for an ad. If you give Facebook the Click ID and append it to other information on that contact record, Facebook is able to say, "Oh, I know who that is," and then pipe that back into its algorithm.

## "AFTER THE IOS 14 UPDATE, EVEN HIS AGENCY LOST THE MAJORITY OF THEIR PERFORMANCE."

The issue with the Facebook Click ID is you can only use it after the conversion; they have to have taken action. There are tens, hundreds, sometimes thousands of incremental actions that take place prior to conversion. How do you get the information pre-conversion? Answering this question is personal for Kasim; after the iOS 14 update, even his agency lost the majority of their performance. But his Facebook fix, with the use of Hot Jar, brought it back up to the tune of 300%. Hot Jar is a screen recording software that monitors onsite activity and captures the entire URL. To use this to his advantage, Kasim takes the URL, which includes the Facebook Click ID, and using Zapier, ports the Facebook Click ID back into Facebook using the conversion API, and appends it to any standard event. In layman's terms, all the data that iOS is trying to keep from him, he was able to put back into Facebook, essentially hurdling iOS 14. More specifically, Kasim creates

a filter that only pushes events that actually have the Facebook Click ID in the landing page URL, and then once that's set, there are several options that allow him to define lead quality: duration on page, exit page, action content, relevance score. He connects his Facebook account with Zapier and chooses the relevant business account and pixel (this works better for campaigns that were performing prior to iOS 14, because pixels are tenured). Then he chooses the event, event time, event ID, and event URL. This allows him to do some specific, and interesting, things:

- One, optimize for specific events, which is incremental conversions. Kasim recommends having a proxy page because it creates a micro-conversion that can be optimized for within this little construct that he defined through Zapier and Hot Jar.
- Two, report faux conversions to Facebook. As conversions take place in Facebook, Facebook starts to scale, based on what it knows about who converts. Creating a faux conversion based on your ideal behaviors means that Facebook starts to give you more of those contacts because it's predictive indications of intent, which means that they actually are more likely to convert.

As if all of that weren't enough, the most major component of Kasim's Facebook fix is that using it allows you to build remarketing audiences with the user base that Apple tried to hide with the iOS update, because it looks like first party data. This is the best part for Kasim: all of the people that lost Facebook campaigns can use this trick to get them back.

# CONCLUSION

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We hope that you have enjoyed (and implemented) all of the Wicked Smart strategies we've shared in this book.

If you would like to learn all of our latest game changing Wicked Smart tactics, tools and strategies, the only place to do that is in the War Room Mastermind. We meet 4 times per year in a 5 star resort with the brightest business minds on the planet to network, do deals, share what's working (and what's not) and rapidly grow our businesses. War Room members own businesses generating annual revenue ranging between \$1 million and \$1.5 billion per year. So, whether you are looking for help scaling to \$10 million or \$1 billion, everything that you need is in War Room.

In addition to meetings, War Room members have free access to over a half dozen, 2 day deep dive topical intensives, which are also free to member's employees for advanced training on the hottest topics in digital marketing and business. Combine all of that with a member Concierge to facilitate appointments, professional note takers sending meeting notes out after each meeting, an active Facebook group, and a content rich members only site containing all meetings and presentations going back six years, there's simply no more comprehensive resource and support community to help you rapidly grow and scale your business.

Oh, and one last thing. War Room membership also gets you direct access to Ryan Deiss, Richard Lindner, Perry Belcher and Roland Frasier. In fact, War Room is the ONLY way to have up to 5 half hour calls per year with any of our founders to work directly on your business.

Check out the War Room site today at [www.warroommastermind.com](http://www.warroommastermind.com) or call DeAnna Rogers at 512-797-5100 today and get connected to a whole new level of growth and profitability for your business.

The Wicked Smart entries contained in this book can change your business and change your life. They represent just a handful of the proven, actionable strategies and tactics shared by our members in past WarRoom meetings. If you would like to be a part of a community of ultra-successful entrepreneurs who are working together to grow the value, the revenue and profits of their businesses while having a positive impact on their families, employees, customers and the world, then you should consider applying to become a member.

Check out the War Room site today at [www.warroommastermind.com](http://www.warroommastermind.com) or call DeAnna Rogers at 512-797-5100 for more information.