



Checklist 2: Creating Your Marketing Plan

Project Name: _____ Date: _____

Yes No

Important: This is an important checklists/exercise sheet which you should complete before moving any further. Inside the remaining checklists, we'll be taking the information from this exercise sheet to complete the checklists. Every business is different and my example here can and should be adjusted to suit your business and audience base. Think outside the box and think like a customer when complete this task.

1 Decide on the goal for your marketing bot. (Tick any box which is relevant)

- A. To educate the subscribe about the offer/product/brand.
- B. To offer free reports/videos/something of value and build trust.
- C. To be able to follow up and close the sale.
- D. To continue to educate current customers and subscribers.
- E. To offer discounts on products and services.

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F. To deliver weekly or monthly newsletters.

2 List all the important Free and Paid offers in your funnel.

Important: If you only have one product or service this is fine. You might have free reports, videos, blog posts, even Facebook posts you can share and include in your marketing bot.

Example

*Paid Product A - Newbies
Paid Product B - Affiliate Marketing
Paid Product C - Software
Free Product A - Report
Free Product B - Facebook Video
Free Product C - Webinar*

ITEM	PRODUCT NAME	FLOW NAME (for later)
Paid Product A		
Paid Product B		
Paid Product C		
Free Product A		
Free Product B		
Free Product C		

3 List any other important links or parts of your business.

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Examples

<i>Opening Hours</i>	<i>Support Desk URL</i>	<i>Shipping Details</i>	<i>Refunds</i>
<i>Bulk Orders</i>	<i>Guarantees</i>	<i>FAQ</i>	<i>Partnerships</i>
<i>Careers</i>	<i>Blogs</i>	<i>Social Media</i>	<i>Email List</i>

Complete the details below with all the important “Keywords” that you would like to include.

Topic #1 (example: FAQ): _____

(insert message or link to URL for this particular topic)

Topic #2 : _____

Topic #4 : _____

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Topic #5 : _____

Topic #6 : _____

Topic #7 : _____

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Topic #8 : _____

- 4 **Decide from now what you're first messenger bot will present when someone begins a chat.**

Important: You can change this at anytime but to continue with the rest of the training and checklists this part is important. Keep it simple to begin. Do not worry about any of the technical sides of this for now. We'll get to that. Just have your basic plan ready to go.

Example

*I will present a welcome message.
I will add 3 quick replies offering a;
free report,
link to one of my products
a link to the support desk.*

First BOT Message

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Quick Replies

TOPIC	ITEM NAME OR URL	KEYWORD (For Later)
Free Report		
Paid Product		
Support Desk		

- 5 Give this particular chatbot a Keyword that would make sense for the user to type.**

Example: Chat*

Your Chosen Keyword: _____

- 6 Above you'll see KEYWORD (For Later) in all the tables. Return and give each offer/ product/item/topic and specific keyword.**

(complete all the tables above for this step)

- 7 Type out your Getting Text**

Important: This is what people see what they click Send Message on your Fan page. This can be similar to your first bot message (above) and can include a keyword asking the visiting type in order to take them to a particular Flow.

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Example: Welcome, please type CHAT to begin.

Your Greeting Message

(example: Welcome, please type CHAT to begin)

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