Virtual Summit Cheat Sheet

Phase #1: Planning your summit

Step #1: Choosing the topic for your summit
- ❏ **Action Item #1:** Set your goals.
- ❏ **Action Item #2:** Choose your topic.
- ❏ **Action Item #3:** Decide on your summit's date.
- ❏ **Action Item #4:** Select the product you'll sell on the summit.

Step #2: Picking your speakers
- ❏ **Action Item #1:** Make a list of potential speakers.
- ❏ **Action Item #2:** Create a speaker checklist.
- ❏ **Action Item #3:** Set up a calendar on which speakers can book their interview times.
- ❏ **Action Item #4:** Set up a platform to record the interview calls.
- ❏ **Action Item #5:** Write your general interview questions.

Step #3: Setting up your partner program
- ❏ **Action Item #1:** Decide on your prizes.
- ❏ **Action Item #2:** Create the terms for your affiliate program and design a landing page.
- ❏ **Action Item #3:** Write email copy / communication schedule for affiliates.
- ❏ **Action Item #4:** Reach out to potential affiliates.
- ❏ **Action Item #5:** Organize your contest.

Phase #2: Recruiting and Creating Assets

Step #1: Recruit your speakers.
- ❏ **Action Item #1:** Start recruiting speakers.
- ❏ **Action Item #2:** Follow up with each non-answer.

Step #2: Interview your speakers.
- ❏ **Action Item #1:** Record your interviews.
- ❏ **Action Item #2:** Record your keynote speech.

Step #3: Create assets for the summit.
- ❏ **Action Item #1:** Create graphics and banners.

Step #4 Develop initial landing and thank-you pages.
- ❏ **Action Item #1:** Create your landing page.
- ❏ **Action Item #2:** Create your thank-you page.
- ❏ **Action Item #3:** Write your automated thank-you email.

Phase #3: Developing and promoting

Step #1: Set up your PPC campaign.
- ❏ **Action Item #1:** Choose your ad campaign's objective.
- ❏ **Action Item #2:** Choose your budget.
- ❏ **Action Item #3:** Write your ad.
- ❏ **Action Item #4:** Choose an image.
- ❏ **Action Item #5:** Choose ad placement.
- ❏ **Action Item #6:** Choose ad targeting.

Step #2: Create your individual speaker pages.
- ❏ **Action Item #1:** Check your landing & thank-you pages.
- ❏ **Action Item #2:** Create a sales page with an order form.
- ❏ **Action Item #3:** Create individual speaker pages.
- ❏ **Action Item #4:** Create your presentations page.
- ❏ **Action Item #5:** Create your agenda page.
- ❏ **Action Item #6:** Create your "Contact Us" page.
- ❏ **Action Item #7:** Create a membership site for priority pass buyers.
- ❏ **Action Item #8:** Create a membership Facebook Group.

Step #3 Quality control everything.
- ❏ **Action Item #1:** Quality control everything.

Phase #4: Launch the summit.
- ❏ **Action Item #1:** Check in on your speakers and advertising.
- ❏ **Action Item #2:** Schedule your social media posts.
- ❏ **Action Item #3:** Write and schedule your daily emails.
- ❏ **Action Item #4:** Send reminders to your email list.
- ❏ **Action Item #5:** Don't forget your price increases.
- ❏ **Action Item #6:** Hold daily meetings with your team.

Phase #5: Wrap everything up.
- ❏ **Action Item #1:** Make sure all purchases were delivered from the summit.
- ❏ **Action Item #2:** Send handwritten thank-you notes to each of your speakers.
- ❏ **Action Item #3:** Have a team meeting about what went well and what should be improved.
- ❏ **Action Item #4:** Organize your notes into an SOP or checklist to follow next year.
- ❏ **Action Item #5:** Continue to monetize your summit.
- ❏ **Action Item #6:** Relax. You deserve it!