The 7-Figure Evergreen Machine

SEGMETRICS

Welcome to the 7 Figure Evergreen Machine!

In this mini eBook, you'll learn how to evergreen your business – transforming your sales cycle from the old-school launch model to an automated "sell while you sleep" evergreen model.

Everyone knows evergreen sales funnels are the wave of the future, but very few people are successfully pulling it off. We want to change that, because we've seen first-hand how evergreening can rocket a business to huge success. If everyone really understood the power of evergreen, they'd ditch their old systems in a heartbeat.

This eBook will take you through the nitty gritty details to help you understand the evergreen model and successfully implement it in your own business.

Disclaimer: The following information is aimed at people who have a proven product with a bare minimum of 100 paying customers. If you're just getting started with your business, you may want to save this eBook for later.

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Chapter 1: What Is Evergreen, How Does It Work, and Why Do I Need It?

When you first started your product, you did everything yourself. You built it, delivered it, marketed it and sold it.

It was all you, all the time.

When it was time to launch, you (and maybe a small team) ran yourself ragged making as many sales as possible. When the launch ended, your profits immediately dropped – and so did your energy level.

That's the up-and-down roller coaster framework that defines the launch model.

That's okay when you're just starting out, but it can't stay that way forever. By its very nature, the launch model is unsustainable and prevents you from growing. The only way to grow is to remove yourself from the nitty-gritty tasks so you can focus on the big picture.

And the best way to do that is by going evergreen.

This is how we define evergreen products:

Evergreen automation allows you to scale and segment both your process and product to give customers the right content at the right time without manually managing each relationship, resulting in predictable outcomes.

Let's unpack this definition.

Evergreen automation allows you to scale and segment both your process and product.

Automation is the bedrock of evergreening.

Automation takes YOU out of the equation.

It's the polar opposite of having a launch where everything succeeds or fails based on the amount of energy you put in. With automation, you set up the machine and put it into motion. You spend your time managing the overall system, not getting dragged down into the individual pieces of the system.

Automation & delegation are the core tenets of any successful business. Howard Schultz isn't the one selling you your morning coffee, Elon Musk isn't standing in the Tesla showroom, and Tim Cook isn't helping octogenarians set up email on their new iMac.

Automation allows you to delegate. But instead of delegating to an employee, you're delegating to the technology.

Automation also gives you flexibility. Unlike the launch model, where the process is always the same and every customer needs to go through an identical funnel, evergreen allows you to scale and *specialize both your process and product.*

You can scale because you aren't limited by your own energy. If you want to sell to a million people instead of a thousand, that's no problem. Your system is automated, so it makes no difference to you.

You can *segment* because you're able to sort different leads into different funnels. Again, since the process is automated, it doesn't matter if you have one product or ten. Everything takes care of itself.

And this applies to both your processes and products. You can design evergreen processes that are set to run on their own, requiring no additional effort from you once they're set in motion. And you can design evergreen products that contain timeless, always-relevant material, requiring no additional upkeep from you once they're launched.

In every part of your business: if it can be automated, it should be automated.

Give customers the right content at the right time without manually managing each relationship.

When you run a launch, you're selling to a cohort on your timeframe, not theirs. You create artificial scarcity to drive urgency. You dictate when the launch will happen, and you dictate when your funnel emails will deploy. You are responsible for pushing everyone towards a purchase in a tight time frame, whether they're ready to buy or not.

And once the launch is over, it's over.

Customers who may be interested after the fact have missed the boat. They have to wait until the next launch to purchase, and there's no way of knowing if they'll still be interested at that point.

Now, there's nothing wrong with the scarcity model, and it's a great strategy for increasing sales. But it has its limitations. We're more interested in increasing your overall lead value through evergreening.

It works like this:

1. You put an automated email funnel in place that deploys whenever someone new opts in.
2. They get all of the same material they would see if you were running a regular launch, but they get it when they're at their peak level of interest.

3. They're in their own personal, private launch, which ends (ideally) with a purchase, no matter when they started.

And compared to a one-time launch, the entire process is repeatable and testable. That means that you can see in real time whether a different email header gets better open rates, or if sending on Wednesday rather than Monday gets you better sales.

But this is about more than just the *right timing*.

It also encompasses the *right content*.

Let's say you're using Infusionsoft or some other software that makes it easy for you to segment or differentiate your customers.

- If they opt in on a landing page for Product 1, your software automatically puts them into the funnel with content relevant to Product 1.
- If they opt in on a landing page for Product 2, they'll only get content relevant to Product 2.

All without you having to manage it.

Remember, because evergreen funnels are scalable, this works for one customer or one million, one product or fifty. You don't need to worry about manually segmenting your cohorts or deploying ten different email funnels. You don't need to worry about potential customers missing the bus.

Once you set it all up, it happens automatically. And all of those warm leads will get the most relevant content at the exact moment of their peak interest – not six months later when they've gone cold.

This is physically impossible to do without an evergreen system in place.

Resulting in predictable outcomes.

This is the most crucial benefit of going evergreen.

With the launch model, your outcomes are "**consistently inconsistent**." Even if you have a hugely profitable launch, your income will take a nosedive as soon as it's over. Like we mentioned before, it's a roller coaster model, pure and simple.

Evergreening is about predictability, not roller coasters.

Think of it this way:

Automated systems → predictable outcomes → predictable income → poised for growth

Try as hard as you want, but there's no way you can grow a business on an unpredictable foundation. Imagine if Apple only made money when they launched a new product. They'd never survive.

But that's not what Apple (or any successful business) does. They need to know they're bringing in enough money on a consistent basis to run their worldwide retail stores and retain thousands of high-paid employees and fund their R&D. They need to know they have a predictable revenue stream.

Their yearly product launches BOOST their sales, and give them new products to continually sell, but don't REPLACE their day-to-day automated sales process.

Let's calculate your potential Evergreen Revenue.

You'll need to know these numbers:

- Units (U)
- Leads (L)
- Price (P)

First, calculate your launch Conversion Rate (C):

1. How many **Units (U)** did you sell this past year?
   (For example: U=10)
2. How many new **Leads (L)** did you have this past year?
   (For example: L=1,000)
3. Now, calculate your **Conversion Rate (C)** by dividing **Units by Leads [(U) ÷ (L)]** .
   (For example: 10 Units ÷ 1000 Leads = 1% Conversion Rate)

Next, calculate the **Value per lead (V):**

1. How many **Units (U)** did you sell this past year?
   (For example: U=10)
2. What's the **Price (P)** of your product?
   (For example: P=$500)
3. Now, calculate your **Revenue (R)** by multiplying **Units (U)** x **Price (P)**.
   (For example: 10 Units x $500 = $5,000 Revenue)
4. Now, calculate the **Value (V)** of each lead by dividing **Revenue** by **Leads** [(R) ÷ (L)] .
   (For example: $5,000 Revenue ÷ 1000 Leads = $5 Value Per Lead)

Now, you can easily estimate your **Evergreen Revenue (ER)**:

1. What's your **Value per lead (V)**?
   (For example: $5)
2. How many **Evergreen Leads (EL)** do you anticipate after you evergreen?
   For example: EL=3,000)
3. Now, calculate your **Evergreen Revenue (ER)** by multiplying your **Value per lead (V)** x **Evergreen Leads (EL)** [V x EL]
   (For example: $5 Value per lead x 3000 Evergreen Leads = $15,000 Evergreen Revenue)

Math. Aren't you glad that you took that algebra class in high school?

Evergreen makes everything predictable. And predictability is the cornerstone of a healthy business that's primed for growth.

Now it's time for you to figure out your own metrics. Use the formulas above to establish your baseline launch conversion rate, then determine your value per lead, the estimate how much you'd be bringing in if you switched to evergreen. If you can't figure out your conversion rate, use 1% as a conservative estimate, or 5% if you're doing gangbusters.

How do your numbers look? What are the implications of going evergreen for you?

Chapter 2: 10 Steps to Automate Your Sales Funnel

Your "funnel" begins after someone opts in to your email list in exchange for some kind of carrot content – a free PDF, checklist, worksheet, or mini-book with valuable information.

In the traditional launch model, you tag that person with "Ready For Launch" and they become part of a cohort receiving your marketing emails. But in the evergreen model, this process is entirely automated.

Why do this? Why automate?

Internet marketing is all about finding the "levers" that you can manipulate to increase sales.

Affiliate marketing is a lever. So are PPC ads. When you want to increase your results, you increase your PPC spend, and sit back and watch your revenue increase.

An automated funnel is just another lever for you to adjust. It allows you to test different parts of your funnel, so can you learn the best way to move the lever.

For example, you might try deploying a particular sales email on different days and times, and find that you get the best results when you email on Wednesdays at 11am. When you move that lever, you know you'll see sales improve. Or, you might A/B test the content and subject lines of your emails, discovering that one subject line outperforms the other. Move that lever, and you'll see the results.

There's a bit of work involved in setting up an evergreen funnel for the first time, but it's worth the time investment. Once you're up and running, you can focus on optimization mode: making micro-adjustments that move the lever to increase sales.

We're going to walk you through the setup process specifically for Infusionsoft users. Even if you don't use Infusionsoft, the techniques apply to any automated marketing tool, so please read this regardless. There are universal takeaways that are valuable no matter what CRM you happen to use.

Set up your first evergreen funnel in Infusionsoft

1. Create a **new campaign** named Evergreen Funnel

2. Go into your Evergreen Funnel 1 campaign and **create a new form**.

High-power Tip: In that form, create hidden fields with all of your UTM tags. Those are the codes that signal where your traffic is coming from (Twitter? Landing Page #1? Email #2?), so you know exactly what offer or version people are responding to. Hopefully you are already using UTM codes – anyone who works in internet marketing should be using them.

For example, if someone comes to you via utm_campaign=facebook-1, make sure that information is saved with the contact. While you're evergreening, you need to be able to see which sources are the most successful so you can optimize your funnel and target those places.

3. Next, put the **form on your landing page**.

4. In the Infusionsoft campaign builder, add a sequence that says "**anyone who fills out this form gets a tag added.**"

The tag you want to use is "evergreen-funnel-1-start". Now, you could do this by having your form go straight into a sequence, but you get much more flexibility by assigning a tag. In the future, if you end up using 2-3 different forms to start your funnel...or if you want this funnel to begin after another funnel...it will be much easier to start it by just applying another tag. It's also helpful if you want to forcibly send someone into a funnel – all you have to do is assign them the tag instead of making them fill out a form.

5. Start a new sequence and set up a start goal. When someone is assigned the tag evergreen-funnel-1-start, that signals your **pre-sale sequence**.

In this sequence, you create emails and timers for your entire pre-sale launch funnel. All you have to do is copy and paste all the emails you've written from your previous pre-sale funnel and add the appropriate time delays.This is also a good point to revise your pre-sale emails if you haven't touched them in a while. Jeff Walker's book, "Launch," is an excellent resource for writing (or revising) your pre-sale emails. Jeff divides Pre-Launch Content into three parts:

- PLC #1: The Opportunity – Why should your customer care about the product?
- PLC #2: The Transformation – What are you going to do to change your customer's life?
- PLC #3: The Ownership Experience – How is the customer going to achieve this transformation?

(If you haven't read "Launch," we recommend you get it now.)

6. Next, it's time to build your **sales funnel sequence** in Infusionsoft by copying and pasting your regular launch sales emails.

You should keep this sequence separate from your pre-sale sequence (above) for better flexibility. It allows you to easily split test different pre-sale funnels leading into your sales funnel and see how they perform. Remember, your sequences should be small and agile, which will let you test and improve your sales funnels later.

Your sales funnel emails should point to an expiring sales page. Sometimes this can be technically difficult, but there are workarounds you can use if you're not tech savvy.

For example, if you want your sales page to open on Wednesday and close on Friday, you can add a simple countdown timer to your page that always counts down to Friday when the page is "open," and turns off when the page is "closed."

That way you don't have to worry about syncing the sales pages with each individual user.

7. Now you should have your landing page, your pre-sale funnel and your sales funnel all set up. But you're not done yet. Create another sequence in Infusionsoft – **your downsell funnel**. Remember, it's important to keep all of your funnels separate so you can test them and change them later.

Your downsell funnel is a short funnel aimed at people who haven't purchased after they've gone through the pre-sale and sales funnels. It's only 2-3 emails that essentially say, "Hey, I'm sorry you weren't able to purchase before the course expired. A lot of people have been asking when the course will open up again, so I'm offering another product in the meantime."

The downsell product should be cheaper and smaller than your main product to make it easy for people to say "yes" and purchase. This is also a great place to sell one of your "gateway" products – less expensive products that can quickly get leads value out of your courses, so that they're more likely to buy larger products later on.

8. There's one more sequence for you to set up, and that's a **last chance funnel**.

Two weeks after someone goes through your sales funnel, if they still haven't purchased the product or the downsell product, they receive the last chance funnel. It contains a special offer for the original product, and it can be discounted or not.

The emails say that you're opening the window to purchase the product for a couple of days only, because you understand that life gets in the way, and you want to provide this special opportunity for a limited time.

This is the last time you try to sell to this particular person. After the last chance sequence, it's time to cut your losses.

9. But wait! Your entire sequence needs one more thing. You need to add a goal: "Purchase product." Let's say someone buys your product. The funnel should stop there, so they don't receive any more sales messages. **You don't want leads from your initial funnel to be shown the downsell offer or (worst-case) a discounted offer for the product they just bought**.

There are a couple of ways to set up a purchased item.

In Infusionsoft, when someone purchases, the funnel automatically ends. But, we don't want to do that for the same reason we didn't want to use a form at the beginning of the sequence.

It's better to use a tag so you have flexibility both in managing your funnels and reporting on the results. So, when someone purchases, assign them a tag:

"Customer-Product Name" or "Customer-Downsell Product Name." Then, create a goal that when the user has that tag added that they skip to the end of the funnel.

10. The final thing you need to do is **add a finish tag**.

Your first tag was evergreen-funnel-1-start. Your last tag should be evergreen-funnel-1-end. This helps you see how many people went through your funnel and actually purchased.

If you don't add this tag, you'll lose out on valuable information for your bookkeeping and analytics. **Don't forget this small but crucial tag**.

Once you've automated your sales funnel, you can start moving levers.

You no longer have to rely on assumptions about what's working and what's not – you can actually test the different parts of of your system and put that knowledge to use. We always say: if you can test it, you should.

We'll wrap up with a few testing ideas to get you started:

Length of your funnel

It's a delicate balance between giving people enough information to make an informed buying decision, and stretching out the sales process so long that they become disinterested.

There are articles everywhere about how long the perfect funnel should be, but you don't really know what works for your customers until you try some different options and weigh the results.

We have a colleague who changed their 6 week funnel to a 1.5 week funnel, and discovered that the product sold just as well in ¼ of the time. By moving their sales cycle 4x faster, they got great results.

But, again, these things are not cut and dry. You have to test for yourself and see what your customers respond to.

Day and time of your funnel

You may have read that sales emails perform the best on this day or that day. But what works for your customers?

Try sending your emails on different days of the week and at different times and seeing when they perform best.

Then, you can assign your most crucial email to the best performing date and time.

Content and subject line

Even if you don’t evergreen your system, you should still be testing the copy and subject lines for your email funnels. You may see big changes, you may only see small changes. But even a tiny increase in sales adds up over time.

This is an important lever to experiment with.

If you take away one thing from this chapter, let it be this:

- The traditional launch model gives you one shot to make it or break it.
- The evergreen model gives you a new chance to succeed every time a new funnel begins.
- With evergreen automation, you can save time, stop worrying, and focus on pushing those levers instead.

Chapter 3: Increase Repeat Sales by Evergreening Your Customer Experience

In most marketing, your end goal is “the sale.”

To this end, many businesses devote over 95% of their energy toward converting customers.

But this isn’t enough.

The problem is, very few businesses spend enough time on what happens after the sale. Once the credit card goes through, they tend to drop their customers like hot potatoes. No ongoing communication, no special attention, no cross-sell opportunities. Customers feel left behind.

This is called Post-Purchase Neglect, and it’s a big issue. We can’t deny that “the sale” is important – however, it’s just as important for you to focus on what happens *after* the sale as what happens *before*.

So, let’s reframe and shift mindsets. From here on out, a sale is not the endpoint in your process: it’s the midpoint. Everything that happens after the sale is just as important as what happens before it.

And what happens after the sale?

The customer experience.

Ask any successful entrepreneur, and they’ll tell you that a positive customer service experience is vitally important to building a sustainable business. Instead of ignoring customers after they buy, you need to pay attention to them. Instead of neglecting them, you need to delight them.

Changing Post-Purchase Neglect into Post-Purchase Delight is a key component of a successful evergreen funnel and a successful business.

Why focus on your customers after they’ve purchased? Two reasons.

First: customers who have a negative experience are more likely to refund, and that’s money left on the table.

Second: customers who have a negative experience are less likely to buy from you again – and that’s even more money left on the table.

Recurring revenue from repeat customers should be your biggest profit generator, NOT one-time sales, and a fantastic customer experience is one of the best ways to make it happen.

We've already discussed the importance of your prospect funnel and your sales funnel. But there's one more evergreen funnel you need to create: **your customer funnel**.

Think of it as the third part in the trifecta of your lifecycle emails:

- Prospect
- Sales
- Customer

The evergreen customer funnel begins as soon as someone clicks the checkout button on your sales page.

The moment of purchase is the most important one in your entire customer relationship, because your customer has just made a decision to invest their time and money into your product. They've committed to you! This is their emotional high point – they're ready to go, they're motivated, they're so excited that they gave you their credit card information.

From here, it's up to you to keep those positive emotions flowing.

1. Create a great post-checkout experience.

One of the worst things you can do right now is to tell your customer to check their email to get started.

All of a sudden, their Buyer's High transforms into Buyer's Doubt. You're pulling them out of the flow of things, sending them AWAY from your site and into their inbox.

And what if the email isn't there immediately? What if it gets stuck in their spam folder? What if your customer waits 10 seconds, 30 seconds, two minutes, ten minutes, or even longer for the email to arrive?

You better believe that during that time, your customer is feeling nervous, uncomfortable, or even annoyed. They're thinking that they just gave you their hard earned money and their trust, and they can't even access their product. The trust and commitment you've built come crumbling down.

This is compounded by the fact that many of your customers may not be used to buying things on the Internet.

Even if they are avid online shoppers, your product may be their first big-ticket Internet purchase – especially on a site they're not used to, like Amazon. There's a large emotional hurdle to get people to pull out their credit card for a big-ticket purchase, and you want to make sure you instill confidence in every step of the checkout process.

Because this is the moment when your customers are most vulnerable, it is incredibly important to build a foundation of trust and establish a comfort level. Instead of sending your customer to check their email, you should get them straight into the courseware immediately.

This is 100% the most effective way to make your customers happy they purchased and keep their emotional upswing going.

2. Make some content available immediately.

Remember, the post-purchase experience is all about delighting your customers. What better way to do that than immediately giving them access to the content they're excited about?

When your customer logs in, there should be something there to greet them. Even if your course is dripped, and they can't access every lesson right away, they need to be able to consume some of the material to keep them feeling good about their purchase.

You can easily monitor whether your customers are logging in (and follow up if they aren't) with your membership platform.

3. Send a welcome email.

Customers should also receive a welcome email right away.

You can use an email templates, which are designed to look great on desktop and mobile and include your logo and branding for consistency. You absolutely have to make sure your welcome email looks its best.

Every touchpoint of the customer experience needs to do its part to delight the customer…even the design of your welcome email.

In your welcome email, thank your customer for buying, and pump them up! Tell them that they're in for something special. Get them ready for what's to come with a syllabus that outlines the course content they'll be receiving.

Just like in your sales funnel, you have to tell people what to expect so they feel more comfortable. And of course, include their login information and a link to the course so they can easily find it.

It helps to think of your welcome email as if you're a remodeling contractor.

Imagine if you had a client who needed their house remodeled, and you never communicated to them what you were going to do and when you were going to do it. You just showed up at their house with a crew of guys and some demolition equipment. Your client would be horrified. They'd never let you in the front door without an explanation of what was about to happen.

Well, your course customers deserve the same explanation so they can feel comfortable with the process. That's why your welcome email is so vital.

4. Maintain ongoing communication with your customers.

You should continue to drip emails and content throughout your course, providing helpful hints, giving reminders of what's coming up next, and asking if there's anything your customers need.

Ongoing communication goes a long way in maintaining your customers' peace of mind and keeping your positive relationship going.

Now, assuming you've got a six week course with weekly dripped lessons, your ongoing email content should look like this:

- Beginning of a new week: short email announcing the lesson for the week and getting everyone pumped up for it
- Middle of the week: email announcing that the new lesson has gone live, and a link to view the lesson in your membership site
- End of the week: email telling your customers "good job" on the lesson if they've logged in, and reminding them to check out the lesson if they haven't logged in

This should continue for the duration of your course.

5. Send presents – special unadvertised Bonus Content.

Now, when your course is about ⅔ complete, it's time to really amp things up. It's time to give out Bonus Content.

This is a fun extra that wasn't advertised on your sales page and that your customers aren't expecting, like an extra video lesson or worksheet. **It should be a complete surprise, almost a random act of kindness on your part.**

People love when you go above and beyond (and they love free stuff!), and this is the perfect way to do it. This is a perfect example of Post-Purchase Delight. You can make your Bonus Content even more exciting by using a survey to allow people to choose what type of Bonus Content they want. Maybe they want to learn about Technique A, maybe they want to learn about Technique B. It's fun for them to pick, AND their choices provide valuable data you can use to see what your customers are most interested in (and it might inspire you to create your next course based on your customers' preferences).

Bonus Content does a couple of things for you.

One, it delights your customers and generates goodwill that will come in handy as your course comes to a close.

Two, it's a good retention strategy if a customer wants a refund at any point. By telling them "I'm happy to refund you, but you won't receive the Bonus Lesson," it makes them stop and think, and possibly reconsider. It's a good way to entice people back into the fold.

6. Create more opportunities to add value.

When your course has only one week left, it's time for a Cross-Sell. This is the moment when you invite your customer to become a repeat customer, and it's the culmination of all the good work you've done maintaining your customer experience funnel.

To do a cross-sell, you have to know what your previous customers tend to purchase after finishing this particular course.

For example, after they go through Course 1, you might find that people typically buy Course 2. You can track this data in SegMetrics or Infusionsoft to figure out what your cross-sell product should be.

Next, you have to make it easy for your customers to buy.

Timing and ease are everything. If you try to cross-sell too early in the first course, customers won't be interested. After all, they're still in the middle of a course, and they're not ready for a second one yet.

These things make a huge difference in getting customers to say "yes" to a cross-sell.

A seamless cross-sell shouldn't even feel like a sales pitch. It should feel like you're offering a valuable opportunity to your customers. If your customers are happy with their experience so far, they should be delighted to hear about it.

A quick recap:

Your initial sale is the midpoint of your customer relationship.

The rest of the work that you do from then on is aimed at keeping your customer happy.

You stay in frequent contact, you make sure they always know what to expect from you, and you deliver on it. Sometimes, you over-deliver, like when you give out Bonus Content. You do everything you can to make sure your customers are over the moon about their experience with you.

The evergreen customer funnel is the #1 way to grow committed customers who have a long-term relationship with your products.

It's how you reduce refunds. It's how you make cross-sells happen. It's how you turn one-time revenue into recurring revenue. And at the end of the day, that's what we all want for our businesses, isn't it?

Chapter 4: The Step-By-Step Checklist to Create Your Evergreen Machine

Now it's time to pull it all together with an actionable, step-by-step plan to build your 7-Figure Evergreen Machine.

Here's a checklist for you to work from. Make sure you go through each section piece by piece and check off what you've accomplished.

#1: Make time to build your Evergreen Machine the right way the first time

☐ Schedule six, 2-hour "appointments" over the next two weeks for you to complete this checklist.

Note: Our friend John Logar uses a great mind trick to make sure you actually use this time. He suggests you label each appointment in your calendar as a Doctor's Appointment, and you treat it with the same respect you would treat a regular medical appointment.

This is a high-priority meeting – you aren't allowed to reschedule it, and if anyone tries to take this time from you, you have our permission to tell them: "I can't! I have a doctor's appointment!"

Turn off your phone, disconnect any distractions, and commit to doing the work during this time.

#2: Establish your baseline sales numbers using data from your previous launches

☐ Appointment #1: Re-read Chapter 1 to familiarize yourself with the concept behind "evergreen" and how it will help you generate recurring revenue.

☐ At the end of Chapter 1, there is a formula for establishing your baseline sales numbers. Complete the formula and save the numbers in a spreadsheet or other document.

You absolutely cannot complete the rest of the checklist without these numbers, so get out your calculator and put on your Math Hat! You don't need to be a math whiz to complete the formula.

#3: Create a piece of valuable carrot content that will appeal to potential customers

☐ Appointment #2 - First hour: Spend one hour figuring out what your tribe (your readers, your prospects, your customers) are most interested in learning from you.

Find this information by looking for clues in your current system. What are the topics of your most popular blog articles? What keywords are your visitors Googling to find your website? What email topics have the best open rate?

Make a list of all of these topics.

☐ Appointment #2 - second hour: Brainstorm ideas for carrot content based on what you discovered.

Write a list of 5-10 different ideas that you can write about. Under each topic idea, add 3-5 bullet points to flesh out the idea.

After you finish this, stop for the day. It's important that you let these ideas marinate in your mind for a period of time before you decide which to move forward with.

☐ Appointment #3: Select one topic from your brainstorming list and write about it. Include your best ideas and don't hold anything back – nothing is so secretive you can't share it in your carrot content.

The simplest way to finish your piece is to save the Word document, Google Doc, etc. as a PDF. Just hit "Save as PDF" or "Print to PDF" when you're finished. Congrats! You just made your new carrot content. This is ready to upload to your landing page or squeeze page.

#4: Set up your evergreen funnels to educate prospects, demonstrate your value, and sell your product

☐ Appointment #4 – First 30 Min: Re-read Chapter 2 to learn how to set up your evergreen prospect funnel, sales funnel, downsell funnel and last chance funnel.

☐ Appointment #4 – Last 90 Min: Spend the remaining time of this appointment setting up your evergreen funnels in your CRM as described in Chapter 2.

The sub-steps for Infusionsoft users are listed below, with more detail outlined in Chapter 2.

☐ Create a new funnel

☐ Create a new form

☐ Put the form on your landing page

☐ Add a start tag

☐ Set up a pre-sale/prospect funnel

☐ Set up a sales funnel

☐ Set up a downsell funnel

☐ Set up a last chance funnel

☐ Add a product purchase tag

☐ Add a finish tag

Congrats! You finished a HUGE chunk of work. Pour yourself a drink, pat yourself on the back, and take a break. You deserve it.

#5: Set up your evergreen customer funnel to keep customers happy

☐ Appointment #5: Re-read Chapter 3 to learn how to create repeat business by establishing an awesome customer service funnel.

☐ Spend the remaining time of this appointment setting up a solid post-purchase customer experience. The sub-steps are below, with more detail outlined in Chapter 3.

☐ Make sure you have content immediately available within the course platform so your customers have something to look at right away.

☐ Write a welcome email that every new customer receives.

☐ Set up a customer funnel to maintain ongoing communication.

#6: Turn happy customers into repeat buyers with Bonus Content and cross-sells

☐ Appointment #6: During your final appointment, refer to Chapter 3 once again. First, decide on a piece of Bonus Content to release two-thirds through the course.

☐ Write out your Bonus Content if it doesn't exist already.

☐ Next, decide on a cross-sell product (if you have more than one product).

☐ Set up a cross-sell funnel.

#7: Measure your progress and optimize your systems

☐ Take another look at all the numbers you came up with during your first appointment. Review your projections and budget accordingly. Push your Evergreen Machine live...woo hoo! Then, let it run its course for one month.

☐ After a month, analyze your progress. First, look at your baseline numbers from Step #2. These numbers are B.E., Before Evergreen. Then, use the same formula to come up with NEW numbers based on the past month. These numbers are A.E., After Evergreen.

☐ Next, take a look at all of the separate components of your A.E. numbers. Look at the number of people who came to your opt-in page, the number of people who opted in, the number of people who looked at your sales page, the number of people who purchased, etc.

See if you can identify any potential issues. Do you get a lot of traffic to your opt-in page, but not enough opt-ins? Do a lot of opt-ins visit your sales page, but very few of them purchase your product? How do these individual components measure up when you put your B.E. and A.E. numbers next to each other?

☐ Use this information to begin optimizing your funnel. Let's say you have lots and lots of leads, but nobody opts in. Maybe you should be targeting different leads who would be better suited to your product.

Or, let's say you have lots of opt-ins, but very few purchases. Is your carrot content attracting the right kind of customer for your product? Wherever you can identify an opportunity to test, go for it.

Make a change to ONE aspect of your Evergreen Machine, run a cohort through the new process, and run your numbers again. Did you see a positive change? Optimize each item one at a time, run a cohort through it, and run the numbers. It's tedious work, but it will show you how to improve. Just do it!

That's it! If you follow all of these steps, you will have successfully created, launched and optimized your very own Evergreen Machine.

Bonus: Three Rules of Every Successful Evergreen Business

Rule #1: The most important ingredient in a successful Evergreen Machine is ACTION.

It's not enough to read this series and ponder the possibilities while keeping your same old system in place. At the end of the day, if you want to create real, lasting growth in your business, you have to take action and make it happen. If you don't, you're hoarding the information in this series, and not really using it.

We've created 5-, 6-, and 7-figure Evergreen Machines for our consulting clients again and again. And when we look back over our clients' different sources of income, their evergreen funnels are consistently their #1 source of predictable, recurring revenue.

That's because they committed to the idea of the Evergreen Machine and took action. They were open to change, and excited to go through every step of the process.

We want you to see the benefits of evergreening, just like our consulting clients do. All you have to do it ACT.

Rule #2: A successful Evergreen Machine requires you to be generous with your expertise.

Your evergreen funnel relies on you giving away a lot of valuable information in the form of carrot content, educational marketing emails, blog posts, social media posts, etc.

Your gut instinct might tell you to withhold your most valuable information for paying customers. We're here to tell you – don't worry about that. Go ahead and share your deepest, smartest insights. Tell your absolute best tips and tricks. Don't hold back on anything.

Why? This is how you PROVE your expertise and BUILD TRUST with your customers. We're not saying you have to give away all of your information, but every piece of public content you put out into the world absolutely has to have real value to it. No chintzing. No hedging. **Share what you know and the customers will follow**.

Here's an example of why this is such important an important concept when evergreening:

Our team recently attended a marketing conference.

At the conference, we went to a seminar that was aimed at a big pain point for pretty much every business owner. The seminar was packed with people hoping to solve this pain point. The room was electric with anticipation.

The presenter was the CEO of a company that has grown from a small team into a hugely successful, well-known multimillion dollar business. They're the best in the biz, and everyone around us was pumped to hear the secrets behind their success.

Imagine our disappointment when the CEO took the stage and tossed broad platitudes at us for twenty minutes. "Write a mission statement." "Establish your core values."

What did he think this was, Marketing 101? The mood in the room instantly dissolved from excitement to disappointment. We watched audience members' faces drop all around us.

Then, CEO wrapped up his presentation with a sales pitch for his company's newest product, and people started to get angry.

If he had given us incredible information instead of stuff we already knew, we would have been jumping at the opportunity to listen to his sales pitch. We probably would have signed up for the product on the spot.

But because he didn't show us his expertise, and he didn't provide anyone any real value, we were disinterested in what he was selling. We didn't believe it was worth it.

Contrast that with many other speakers, who are also selling their name, brand and products – but who give out amazingly useful and powerful tactics in their seminars. The sales pitch in those seminars is never "sign up now" – it's "check out this additional information at my website."

They've proven their worth, and because they have that Evergreen Machine running, they know they can sit back and let their marketing funnel do its job.

Rule #3: The 75/25 Rule: Learn It, Love It, Live It

What the CEO should have done was followed the 75/25 Rule, carving out 75% of his presentation for free, valuable content, and using the last 25% for the sales pitch.

Instead, he gave us 25% worthless content and 75% sales pitch. His percentages were way off. He didn't prove his value. He didn't win our trust. And at the end of the seminar, he didn't make his sale.

This story is another way of saying: Your Evergreen Machine will only function if you give away valuable content freely and openly. For example, if you're building a new email funnel, you should lead with 3 educational, informative emails before sending 1 sales email. Follow the 75/25 Rule, and you'll impress your customers and make the sales you deserve.

One more thing...

We said it before, and we'll say it again. Creating your own 7-Figure Evergreen Machine is a bit of work, but it's worth it. And it will only help your business if you take action to make it happen.

If you look "under the hood" of any 7-figure online business, you'll find that they use evergreen over the traditional launch model every time. That's how they grow so big and why they have such satisfied customers.

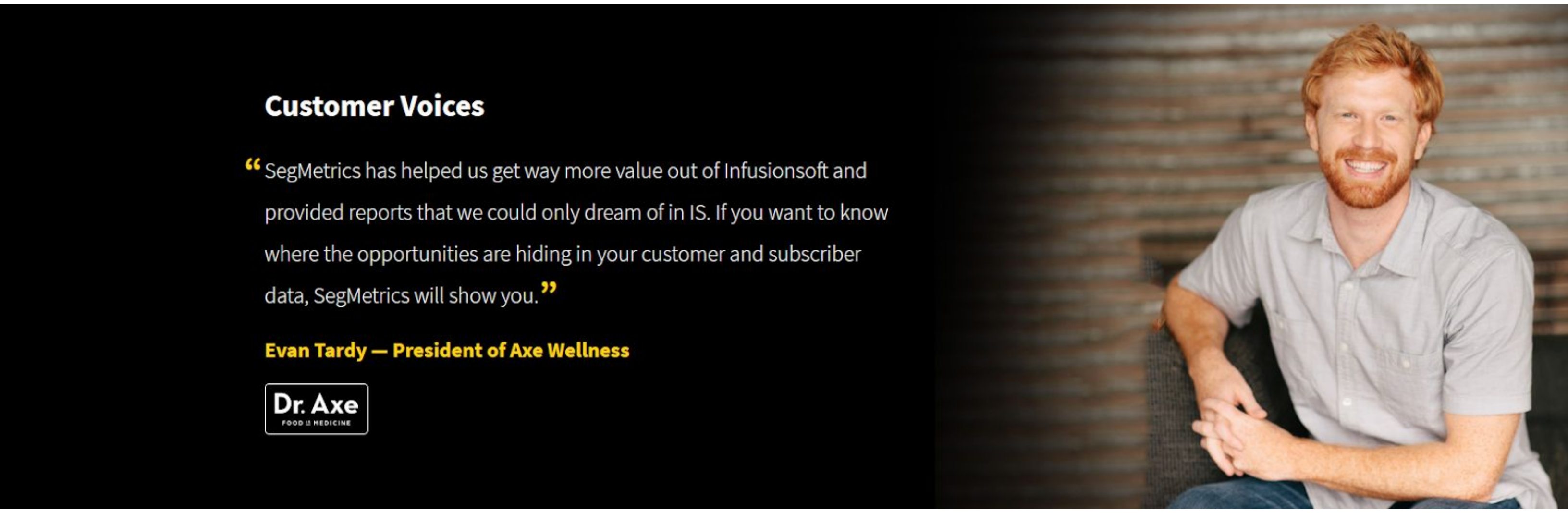
Not only that, but once businesses see the results, they set up another evergreen funnel, and another, and another. It's hard to stop when you see how well it works.

We believe you can be just as successful as our 7-figure clients. Make the time, follow the steps, and you can grow a 5-, 6-, or 7-figure Evergreen Machine to call your own.

Before we wrap up, we want to thank you for reading this eBook.

If you have any questions while going evergreen, please don't hesitate to reach out to us. We'd be happy to talk with you. Happy Evergreening!

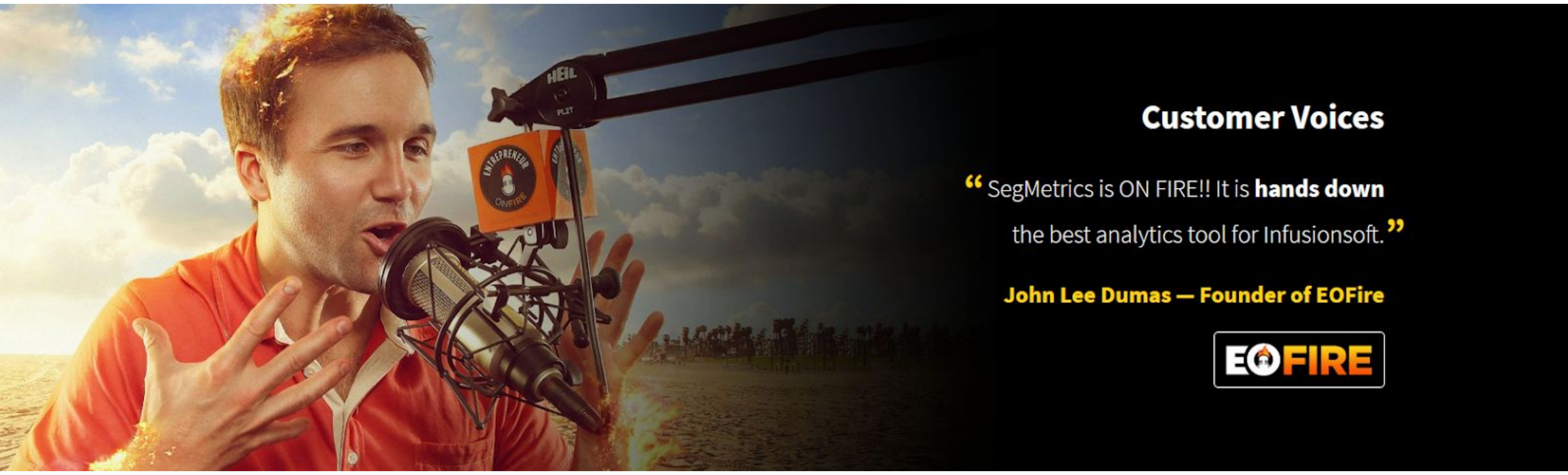
Keith
Founder, Segmetrics



Next Steps

Stop Wasting Your Marketing Dollars

Get 100% clarity on where your leads come from,
how they act, and how much your marketing is really worth.



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