

Monthly Workshop Checklist

Checklist: Recurring Workshop Setup

Use this if you run the same workshop monthly (Q&A, intro class, etc.)

- ☐ Create a recurring zoom link to use for all workshops
- ☐ Create Saved Replies for your regular emails:
 - ☐ Invitation: this week's workshop (sent a few days prior)
 - ☐ Reminder: Workshop Tomorrow (optional)
 - ☐ Reminder: Live in at X time (include zoom link)
 - ☐ Replay / Recap (optional but recommended)
- ☐ Create a one-message confirmation campaign
 - ☐ Set expectations (date/time)
 - ☐ Add me to your address book
 - ☐ Add this series to your calendar (use ical.marudot.com to create & share .ics file)
- ☐ Create a confirmation page (or reuse a generic one)
- ☐ Create a landing page
 - ☐ Offer the series, set expectations
 - ☐ Attach confirmation campaign
 - ☐ Apply tag for registrants
 - ☐ Redirect to confirmation page
- ☐ If using AttractWell Events Manager (optional)
 - ☐ Create a unique event for each occurrence (do this in bulk 1mo+ in advance)
 - ☐ Duplicate events to make this faster
 - ☐ Do not allow self-registration. Send to landing page

Checklist: Recurring Workshop Maintenance

- ☐ Promote event URL (if using events manager) or landing page URL
- ☐ Filter your contacts for registrants
- ☐ Schedule emails in advance using saved replies (do this in bulk 1mo+ in advance)
- ☐ Go live with Zoom as scheduled

Monthly Workshop Checklist

Checklist: Unique Monthly Workshop Setup

Use this if each workshop has its own topic (webinar-style, launch events, etc.)

- ☐ Create a recurring zoom link to use for all workshops
- ☐ Create a date-based campaign for each workshop:
 - ☐ Confirmation (Day 0)
 - ☐ Reminder: Workshop Tomorrow (optional)
 - ☐ Reminder: Live in at X time (include zoom link)
 - ☐ Recap / follow-up (optional but recommended)
 - ☐ Duplicate this campaign and adjust for subsequent workshops
- ☐ Create a confirmation page (or reuse a generic one)
- ☐ Create a landing page for each unique workshop (optional - could use event listings only)
 - ☐ Offer the series, set expectations
 - ☐ Attach campaign
 - ☐ Apply tag for registrants
 - ☐ Redirect to confirmation page
- ☐ If using AttractWell Events Manager
 - ☐ Create a unique event for each occurrence (do this in bulk 1mo+ in advance)
 - ☐ Either allow self-registration, or use a landing page to collect registrations
 - ☐ This impacts which link you share with leads (event URL or landing page URL)
 - ☐ Use an automation to apply tag, campaign if not using a landing page

Checklist: Unique Monthly Workshop Maintenance

- ☐ Promote event URL or landing page URL
- ☐ Go live with Zoom as scheduled