



MIKE KIM PRESENTS:

SYSTEMS, FUNNELS, & WORKFLOWS

Workflows, Processes, And Apps To
Track Clients, Manage Your Calendar,
And Save You From Overspending



When I Started Out In 2015

When I started out in 2015, I was a one-person show. Things were manageable then, but my business grew so quickly over the next few years it became too much to handle by myself. So much of my time was being spent on administrative work and customer service that my “real” work suffered:

- I canceled my podcast for six months -- DUMB!
- I stopped hosting live events for two years -- even though they were high ticket events (\$2000 and up per person) — HORRIBLE!
- I canceled a \$60,000 per year mastermind -- FOOLISH!
- I stopped writing a newsletter that brought in \$9000 a month in recurring revenue -- FACEPALM!

You can see I left more money on the table than a horde of Vegas gamblers at a game of roulette.

The problem wasn't my ability as a coach, creator, or marketer. It was my inability to work like a real business owner. I didn't have the proper systems to run operations and handle the growth I was experiencing.

Everything Changed When I Decided to Get Serious About My Systems, Processes, and Marketing Funnels



Over time, my team and I created standard operating procedures for nearly every activity in my business: social media, sales, customer service, live events, podcast creation, booking, calendar management, travel, hiring contractors, paying contractors, and more.

As a result, I've never had more open space in my calendar to focus on the things that only I can do: run masterminds, host workshops, grow my network, create content, and even write a book.

Two of the people I brought in to help me were Duane Zingale and Geoff Kullman.

Duane is a digital automation and marketing strategist I've hired for several of my businesses to run my social media ads, build funnels, and set up my automated marketing systems.

Geoff is one of the best direct-response copywriters I know. Geoff is only one of three people I've ever hired to write on my own behalf.

I'm honored to team up with these two experts and I'm positive you'll benefit from their knowledge and insights in this guide.





The 3 Processes Every SERIOUS Personal Brand Business Needs

Contrary to popular belief, I don't sit around all day recording podcast episodes or online courses. There's still a good part of my business that involves 1:1 coaching, group coaching, and the occasional writing project.

My guess is that you are somewhat similar and want to supplement your active client work while also filling your pipeline with prospects and email list subscribers.

If a friend asked me how to automate a business like mine, I would tell them there are three vital systems you must have if you want to stay in this line of work for the long run:

- 1. 1:1 Client Management**
- 2. Group Coaching Management**
- 3. Lead Magnets and Nurture Funnels**

Let's cover each of these steps.



1:1 Client Management

If you're a coach or consultant of any kind, chances are you have hours set aside for calls with clients. But where do you keep track of these hours? How do you remember what you covered in each call?

Do you (honestly) do a good job of tracking hours, payments, and communication? Or is all this information scattered across random emails in your inbox, files in Google Docs, notes in Evernote, and memos in your smartphone?

(If so, don't feel bad. Most coaches I know admit this is the case, albeit in hushed tones.)

I'm going to go out on a limb and say that if you don't have a clean cut process where you can see the full expanse of your coaching client work on some sort of "dashboard" you will severely limit your capacity for growth. Things WILL fall through the cracks and you will leave money on the table and fail to retain current clients.



Group Coaching Management

Many coaches and consultants turn to group coaching and mastermind groups in hopes of serving more clients in less time while also scaling revenue. They think group coaching will help them reach the next level of revenue but they don't realize group coaching involves a whole new set of process management problems.

I've run a number of mastermind and group coaching cohorts through the years. It wasn't long before I realized that I was losing track of when certain members renewed (or not), who paid in full vs. who paid monthly, or whose credit cards didn't charge because of payment issues.

Imagine running multiple groups of twelve or more members and all of a sudden having a few people quit. In an effort to fill their spots, you find several new members but now the issue is that everyone is on a different payment schedule. It was an absolute nightmare.

You can only scale to the level of your systems. If group coaching is going to be a serious part of your business, you need to get a system in place to scale and manage your groups.



Lead Magnets and Nurture Funnels

I'm often asked, "If you could start all over again, what is the one thing you would do differently?" My unwavering answer is always, "I would run social media ads to grow my email list much earlier than I did."

List growth should always be a priority if you want to stay in the expert space for the long run. The digital marketing tools available today allow you to fill your pipeline and keep it full.

If there's one thing I learned in my corporate career as the Chief Marketing Officer of a multi million dollar company in the highly competitive New York City market, it is this:

*No successful company ever cuts
BACK on marketing.*

Businesses reallocate their marketing budget all the time, but they don't turn off the faucet. If you want to fill your pipeline you need to accept the simple fact that the same rules of business apply to you.

That means you have to create an on-ramp for people to subscribe to your email list through a lead magnet (some sort of resource that is given in exchange for your email address) and scale that list.

As you can imagine, this involves creating systems through various digital marketing tools.

Now I want to hand things over to Duane Zingale and Geoff Kullman, who are going to share some incredible tips with you. I hope you find this guide incredibly useful!



Mike Kim

Author, *You Are the Brand: The 8-Step Blueprint to Showcase Your Unique Expertise and Build a Highly Profitable, Personally Fulfilling Business*



Duane Zingale:

Overall Path of a Lead Magnet Funnel

When I was six years old, my father was taken away to prison. All of a sudden, my mother became a single parent and I was left to figure a lot of life out on my own.

As a young man, I longed for a mentor to invite me under their wings. I craved the guidance that I couldn't get from my father because he was away. I needed to be understood. *I wanted to be heard.*

Unfortunately for many of those years, all I received were clichés and surface level answers -- even from experts, leaders, and would-be mentors. Everything changed when I came across some content online from a coach during a pivotal season. I clicked on this guy's Facebook ad and his content led me down a path of reinventing myself, changing my career, and doing what I do now.

A Facebook ad helped change my life!

I share this story because it fuels why I'm so passionate about my approach to marketing. Your marketing – and the *way you market* – can and should provide guidance, create space for you to listen to your prospects, and allow them to feel heard.

Your lead funnels should make an introduction between the prospect and your personal brand.



The key is to make sure that you provide ONE solution for ONE real-world problem: an A to B solution.

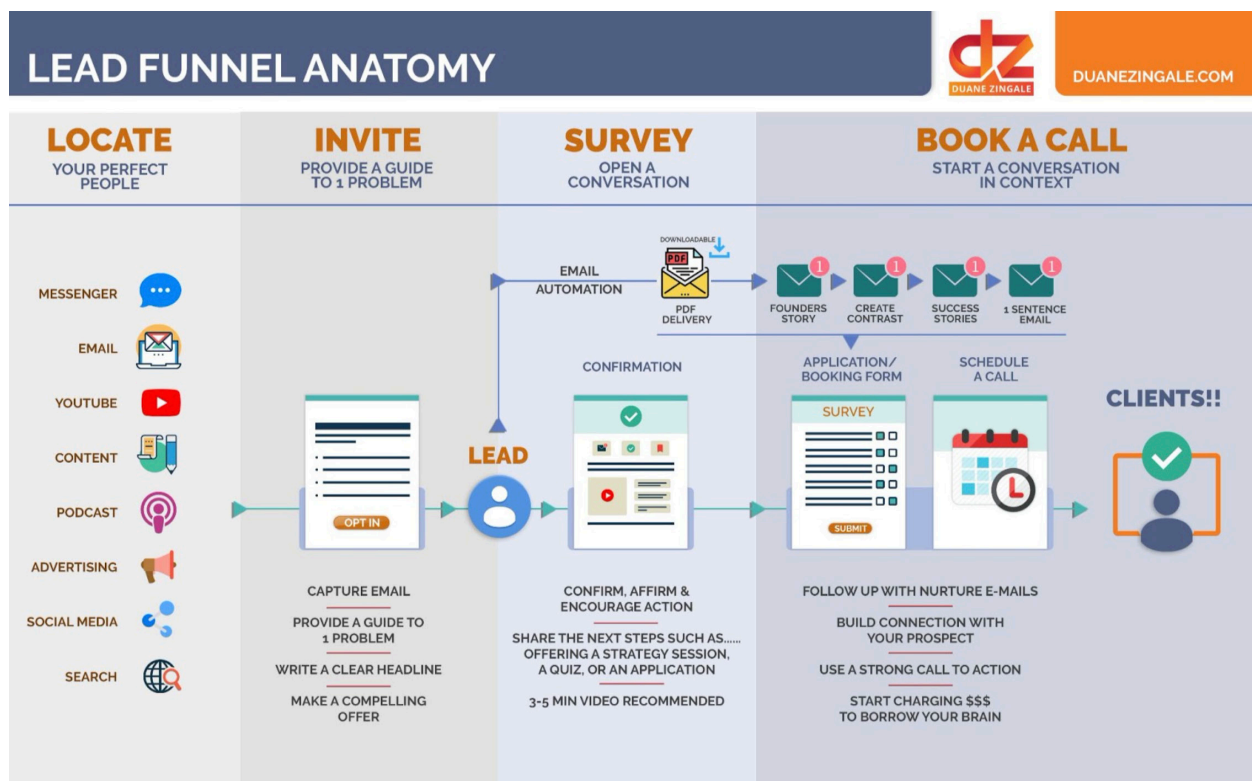
When thinking through your ideas for a lead funnel, you should ask yourself, “What is one thing my prospect can do today that will make a difference?” and then create that resource. That’s why the best-performing Lead Magnet funnels are simple and actionable:

- Checklists
- Templates
- Swipe files
- Roadmaps
- Workbooks
- Manifestos

Once a prospect downloads your free resource, you can position the follow-up conversation around helping your leads take *action* and get *results*. You can follow-up with:

- An email nurture sequence
(Geoff Kullman has provided some samples later in this guide)
- An application, survey, or quiz to guide your followup conversation
- A low cost resource such as a workbook, template pack, etc.

Here is an overall workflow of the process by which prospects can come into your pipeline through digital marketing tools:



If you're struggling to think of what kind of lead magnet you should create, download my free Magnetic Movement Workbook. You will walk through simple questions that will help you craft a consistent flow of leads. Grab it here: duanezingale.com/yatb



Geoff Kullman:

Email Onboarding Sequence Swipe File

Building a personal brand is hard work.

Copywriting to market and grow your personal brand is hard work, too.

So let's take that load off your proverbial shoulders and ease the copywriting burden for you. I want to give you the emails I use when someone first joins my email list. As soon as they opt-in for your free Lead Magnet or webinar, *this* is the campaign you'll want to send them.

With the ***You Are the Brand Certified Email Templates***, you'll know *exactly* what to write to onboard prospects to your list, introduce your Founders Story, and convert readers from COLD to SOLD.

Simply look over the templates, read through the swipe copy examples, and then customize the email copy for yourself and your business. I've tried to make the templates as easy-to-follow as possible, but if you need extra training to customize your copy, go to geoffkullman.com/yatb to access the Email Customization Training as well.

EMAIL #1 – Template

Subject: [DOWNLOAD] Lead Magnet Name + more

Audience: Immediately after opt-in

Preheader: [140 character summary or teaser of the email content]

Content:

[A one-sentence quote from the lead magnet that highlights the audience's top pain point.]

I'm so excited to share [Lead Magnet title] with you.

This PDF is perfect for you if you *know* you need to [tangible *promise* of working with you] so that you can [tangible *result* of working with you].

Here's what you need to do next:

FIRST:

Access the [Lead Magnet name] here.

SECOND:

>> [your low-dollar next step offer] <<

[one or two sentence description of the next step offer.]

So...

If you're ready to go from [primary pain point] to [opposite of pain point, i.e. tangible result mentioned above], [next step offer].

To your success,
[Your Name]

EMAIL #1 – Swipe Copy

Subject: [DOWNLOAD] Brand Voice Template + more

Audience: Immediately after opt-in

Preheader: Congrats! Once you download this FREE resource, you'll be one massive step closer to having a verbal brand that makes you more money!

Content:

"Your brand's voice needs to *align* with your client's aspirations."

I'm so excited to share this Brand Voice Template with you.

This PDF is perfect for you if you *know* you need to create a VERBAL BRAND that connects with your audience so that you can earn trust faster and make sales easier.

Here's what you need to do next:

FIRST:

Access the Brand Voice Template here.

SECOND:

>> Book Your 1:1 Borrow My Brain Session NOW <<

In this 60-minute consultation session, I'll work with you to formulate custom strategies and share unique insights meant *exclusively* for your business. You'll walk away with actionable strategies and ongoing value, ready to take your marketing to the next level.

So...

If you're ready to go from a confusing brand that speaks to no one to a powerful brand voice that draws clients to your offer, then book your Borrow My Brain session to get started.

To your success,

Geoff Kullman

EMAIL #2 – Template

Subject: [Curiosity-driven subject line]

Audience: One day after Email #1

Preheader: [140 character summary or teaser of the email content]

Content:

[A one-sentence *explosion* from your Founder Story.]

Yesterday, you downloaded a copy of [Lead Magnet title]. Today, you'll understand more context about why I wrote the resource for you.

[Insert the 90-second version of your Founder Story.]

[Connect your story to the primary pain point. Then agitate the pain point further.]

[Tell them about the low-dollar next step offer from Email #1.]

[CTA + link.]

To your success,
[Your Name]

EMAIL #2 – Swipe Copy

Subject: Your STORY is your BRAND. Here's Why...

Audience: One day after Email #1

Preheader: Don't get the wrong impression of my brother. He was just a kid, after all... and we all could have been more thoughtful as kids, right?!?

Content:

"I didn't have a *voice* until I was 5 years old."

Yesterday, you downloaded a copy of the Brand Voice Template. Today, you'll understand more context about why I wrote the resource for you.

There's a running joke in my family that I didn't speak until I was at least 5 years old because my older brother talked more than enough for both of us. Why *speaking* when I could be *spoken for*?

It wasn't until I entered kindergarten and learned to read and write that I discovered there was a whole world of *other* words that I could use – *written* ones!

My brother – with all of his character and personality – had unintentionally silenced my *voice* by continually speaking *for* me (or *over* me). But now, with this new word of written words, I could speak and communicate in all new ways.

That's how I found my voice.

Now, as someone who still strongly appreciates the power of the written word, I help personal brands and thought leaders do the same – discover their *brand voice*.

Look...

A personal brand without a verbal identity (aka, brand voice) is constantly battling against the competition with a *louder* or *stronger* or *clearer* voice. Just like my brother spoke *for* me (or, *over* me), your competition will drown you out and steal your voice.

So now that you've grabbed the Brand Voice Template, it's time to schedule a Borrow My Brain session (button below) to start building your own *brand voice*.

CTA Button = Access My Calendar

To your success,
Geoff Kullman

EMAIL #3 – Template

Subject: WAIT!!! Don't spend money on XXX (yet)...

Audience: Two days after Email #2

Preheader: [140 character summary or teaser of the email content]

Content:

I have some GREAT news for you!

What you've been thinking of as one of your greatest *challenges* might actually be one of your biggest *opportunities*. Let me explain:

[Common sense / The gurus / Best practices / etc] tells you if you want to succeed in [business / life / marketing / etc], you need to invest in [identify where your ideal customer often starts spending money] FIRST.

It sounds like great advice (and at a certain point in [business / life / marketing / etc], it is), it's not actually where you need to BEGIN.

If you start with [above-mentioned common erroneous advice], you'll skip over [what they need to do FIRST]...

[Above-mentioned advice] is important, but that's not where you begin!

Here's the lesson:

[Primary lesson, hint towards your product / solution.]

[Remind readers of WHY this is GOOD news.] That's the definition of a competitive advantage!

By the way...

[One sentence of authority / proof. One sentence of CTA.]

To your success,
[Your Name]

EMAIL #3 – Swipe Copy

Subject: WAIT!!! Don't spend money on your MESSAGE (yet)...

Audience: Two days after Email #2

Preheader: Business Marketing 101 tells you to start with messaging. But Personal Brand Marketing is different. Personal brands need something first.

Content:

I have some GREAT news for you!

What you've been thinking of as one of your greatest *challenges* might actually be one of your biggest *opportunities*. Let me explain:

The marketing gurus all tell you if you want to succeed in business, you need to invest in your *message* FIRST. It sounds like great advice (maybe it is), but it's not actually where you need to BEGIN.

If you start with your *message*, you'll skip over the *foundational* work that actually gives your message its power. Yes, a message is an important piece to your business (and marketing), but that's not where you begin!

Here's the lesson:

As a personal brand business, don't believe the "common sense" lies that will plague your progress – don't begin with your *positioning*. Instead, you begin with your *point of view*, *personal stories*, and *platform*.

But HOW is this GOOD news?

While your competition is focused on their *message*, (because that's what the gurus demand), you'll be focused on the *foundational* work that brings *power* to your personal brand *positioning*. It's the definition of a competitive advantage!

By the way...

I've helped tons of personal brands and thought leaders build their marketing foundation and grab more market share of their industry. If you want me to help you do the same, schedule a Borrow My Brain session ASAP.

To your success,
Geoff Kullman

Want the rest of the *You Are the Brand* Certified Email Templates?

To download the entire template bundle for FREE, go to geoffkullman.com/yatb

Connect With Our Guest Experts

Duane Zingale

Duane Zingale loves figuring out how to stack the tech blocks so that you don't have to. When he is not lost in a Lego Fairytale with his two amazing daughters, he is likely to be found geeking out on building relationship-based marketing systems with his LISTEN Framework™.



Discover what lead magnet you should create with his [FREE Magnetic Movement Invitation Workbook](#).

You can also tune into Duane's podcast, [The Marketing Your Movement Show](#).

Geoff Kullman

Geoff Kullman is a direct-response copywriter and brand strategist who personal brands tell better stories, write better words, and make more money. He's worked with some of the world's most influential thought leaders including Dr. Daniel Amen, Joseph McClendon III, Scott Oldford, Paul Martinelli, Dr. Amy Johnson, and many more.

To get FREE training and learn how to personalize this Onboarding Email Campaign swipe file for your own personal brand business, go to: geoffkullman.com/yatb.



If you want to learn more from Geoff, you can subscribe to his podcast, [The Psychology of Copywriting](#).

**You've Just Finished
Reading This Guide.**

So, Now What?

The best thing to do for now is to subscribe to my podcast, The Brand You Podcast with Mike Kim. The show is consistently ranked as a top show on personal branding on Apple Podcasts. Each episode provides marketing tips, business strategies, and success stories that will guide you.

[Subscribe to The Brand You Podcast here »](#)



Wait, One More Thing!

In addition to my podcast, be on the lookout for a special invitation to a series of exclusive coaching calls over the next few weeks to help you start, run, and grow your personal brand business. You'll get the invite in the same email you used to get this magazine.

(Add my email to your contact list: **mail@mikekim.com**. That way your invitation won't go to spam.)

Let's make this the year you start building a compelling personal brand to build your business around. Together, we'll learn how this weird world of marketing works and get you on the right path to start, run, and grow your business.

It's time to live your message, love your work, and leave your mark on the world.

At your service,

Mike Kim

Author, *You Are the Brand: The 8-Step Blueprint to Showcase Your Unique Expertise and Build a Highly Profitable, Personally Fulfilling Business*

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