PLANNING

A step-by-step checklist for planning, building & growing a successful lms (learning management system) website

Planning Your LMS Website
(Learning Management System)

The aim of this stage is to have a clear plan for your LMS/membership webiste – from your idea to your content – which you can move forward with into the creating stage and beyond.

Set Your Expectation | 01

- Get clear on why you want to create a course or membership site
- Audit your existing audience and resources – what are you starting with?
- Decide on your goals for the first 3 months, 6 months and 12 months
- Decide if an LMS/membership website is the right choice for you

02 | Choose Your Idea

- Brainstorm initial ideas
- Research your idea options
- Select your final idea
- Validate your idea with an MVP (minimum viable product)

Decide On Your Offerings | 03

- Choose your membership model
- Decide on the features and functionality that you need
- Decide what your content will be
- Outline your content
- Decide how content will be delivered
- Choose a community type
- Start considering initial member engagement methods

04 | Select Your Pricing

- Determine your pricing structure (eg. monthly, quarterly, annual, one-off)
- Decide on your main ongoing price point
- Consider a special launch discount or offer
- Decide if you want to try free or paid trials in the future

Decide Your Branding & Positioning | 05

- Decide how you want to position your programs in the marketplace
- Choose a name for your site and your individual courses
- Choose your membership branding including colours, fonts, logo
- Create your elevator pitch
- Develop your site one-sheet and sheets for each course/membership

Creating your first course

06 | Build Your Audience

- Decide on your ideal launch date
- Create a wait list page for your upcoming membership site
- Start directing traffic to your wait list page
- Regularly email your list with useful information and behind scenes details

- Buy your domain name
- Decide whether to use WordPress or a different platform
- Decide whether to DIY or outsource site development
- Pick your content tools e.g. PowerPoint, Screenflow, Vimeo
- Choose your payment processor(s) e.g. PayPal, Stripe, Authorize.net
- Choose your membership plugin/platform e.g MemberPress, MemberMouse
- Choose your course (LMS) plugin (if required) e.g. LearnDash, LifterLMS
- Decide on any additional plugins or software needed, e.g. affiliate program, gamification options, form options, shopping cart
- Pick a community option e.g. IPBoard, bbPress, Facebook, Mighty Networks
- Choose additional marketing tools as needed, e.g. email marketing service, landing page builder
- Decide on your site structure and essential pages

08 | Create Your Membership Site (WordPress)

- Set up hosting
- Install and set up WordPress
- Choose a WordPress theme for your site design
- Install and customize your theme
- Set up your membership and/or course plugin
- Create your membership pages
- Set up your membership community
- Add any additional features needed
- Install essential plugins – Backup, Security

- ☑ Create your sales page
- ☑ Link payment and registration to sales page buttons

Create Your Content | 09

- ☑ Decide on your initial launch content
- ☑ Create a content development plan
- ☑ Start to create your content
- ☑ Add completed content to your LMS/site (remember to protect)
- ☑ Create a plan for ongoing content creation

10 | Set Up Your Onboarding

- ☑ Decide on the first 3-5 actions you want your members to take
- ☑ Decide what members need to know to make best use of the site
- ☑ Create an onboarding plan based on the above two points
- ☑ Create a new member tour or getting started video
- ☑ Create an onboarding email sequence
- ☑ Set up any additional onboarding elements needed

Test Your Setup | 11

- ☑ Test your site build e.g. is it mobile friendly, fast enough, user friendly
- ☑ Test your sales process e.g. go through the entire sign up process & payment
- ☑ Test your member process e.g. can you access the right pages, is everything clear, can you access the community
- ☑ Check you receive any membership and onboarding emails
- ☑ Ask a friend to also test all the above and provide feedback

Launching your course

12 | Pre Launch

- [x] Ramp up building wait list
- [x] Consider a beta test for further testing and initial founder members
- [x] Decide on a pre-launch strategy e.g. challenges, content, webinars
- [x] Start building buzz and anticipation e.g. sneak peeks, Facebook Ads

Launch | 13

- [x] Choose your launch tactics e.g. webinars, PLF, summit, live video, affiliates
- [x] Finalise launch details e.g. launch price, date, emails
- [x] Set your launch goals
- [x] Run final pre-launch checks
- [x] Consider hiring launch support – customer service, tech support, FB Ads
- [x] Open the doors and start promoting the membership
- [x] Welcome new members and encourage community use

14 | Post Launch

- [x] Assess your launch results
- [x] Start tracking churn and growth e.g. spreadsheet, plugin stats, SaaS software
- [x] Keep up marketing momentum if doors remaining open
- [x] Communicate regularly with members
- [x] Create a routine for dealing with your community
- [x] Create a plan for developing ongoing content

- ☑ Get feedback from members on initial experience
- ☑ Get feedback from non-members on why they didn't buy
- ☑ Plan date for next launch (launch model) or promotion (evergreen model)

Growing your membership

Attract New Members | 15

- ☑ Decide on core traffic strategies e.g. content, video, podcasting, FB group
- ☑ Create a marketing & promotional calendar for the year
- ☑ Provide a free or low-cost trial and track conversions to full member
- ☑ Consider retargeting ads for those opting in or visiting sales page
- ☑ Consider sales boosting tactics such as affiliates, bonuses, targeted promotions
- ☑ Put an abandoned checkout sequence in place to salvage lost sales

16 | Retain Existing Members

- ☑ Check whether your onboarding sequence is effective – tweak if needed
- ☑ Survey existing members for areas of improvement
- ☑ Look at ways of increasing member engagement – forum topics, gamification, regular member emails, live calls
- ☑ Have a clear and easy cancellation process in place
- ☑ Find out why your members leave and address any areas possible
- ☑ Set up a win back sequence for cancelled members
- ☑ Show up, deliver what was promised and build relationship with members!

- Regularly check in with your community and encourage engagement

- Develop a routine for content creation e.g. batching

- Have a process in place for content delivery e.g. monthly release process

- Set up a process for any live content e.g. member Q&As, webinars

- Know your numbers – keep track of signups, churn, lifetime value

- Send a regular weekly email or video with latest content community posts

- Have a process in place for failed payments

- Have a process in place for sending annual renewal reminders

18 | Scaling & Growth

- Look at ways to scale your content production e.g. hiring an editor, batching

- Look at ways to improve content use on site e.g. filtering, search, saving

- Start scaling your marketing with Facebook or other Ads

- Look at additional sales tactics such as intro offers (tripwires), splinter courses

- Consider a member only affiliate program

- Assess and tweak your email sequences and existing funnels

- Consider increasing your pricing once membership grown

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- Grow your team as needed e.g. VA, community manager, tech support

- Adapt anything that isn't currently working

- Regularly assess health of membership including growth rate

- Consider expanding your offering with higher tiers or additional products

Podcast Recourses

▶ **Online Course Coach Podcast**
onlinecoursecoach.com

▶ **It's A Tribe Thing**
itsatribething.com/optin25692761

▶ **Smart Passive Income Podcast**
smartpassiveincome.com

▶ **LMScast**
podcast.lifterlms.com

Blog Posts

01. Best Facebook Live Stream Software for Mac and PC 2019
wp-tonic.com/blog/best-facebook-live-stream-software-for-mac-and-pc-2019

02. 10 Best WordPress Plugins For Marketing Automation
wp-tonic.com/blog/10-best-wordpress-plugins-for-marketing- automation

03. 7 Things You Need To Know When Choosing a Membership Plugin
wp-tonic.com/blog/7-things-you-need-to-know-when-choosing-a-membership-plugin

04. How to Shoot Professional-Quality Video With Your iPhone
wp-tonic.com/blog/how-to-shoot-professional-quality-video-with-your- iphone

05. What's The Best WordPress Hosting for Your LMS Website?
wp-tonic.com/blog/whats-the-best-wordpress-hosting-for-your-lms- website

06. How to Price Your First Online Course
wp-tonic.com/blog/how-to-price-your-first-online-course