



COMPANION TOOLS & TEMPLATES FOR LAUNCHING YOUR BUSINESS



# 1. PRE-LAUNCH CHECKLIST (MASTER TRACKER)

# WHAT IT IS:

A comprehensive checklist of everything you need to complete BEFORE you launch. This is your launch readiness scorecard—if you're not at 90%+ complete, delay your launch.

# **HOW TO USE IT:**

- 1.2-3 months before launch: Review the entire checklist and assign deadlines to each task
- 2. Weekly: Update the status of each task (Not Started  $\rightarrow$  In Progress  $\rightarrow$  Complete)
- 3.2 weeks before launch: Calculate your Launch Readiness Score (% of tasks complete)
- 4.1 week before launch: Complete any remaining critical tasks
- 5. Launch day: You should be at 100% complete (or 90%+ with non-critical items in progress)

# **GO/NO-GO DECISION:**

- **☑ 90-100% complete:** GO—you're ready to launch!
- 1-2 weeks to finish critical tasks
- **Below 70% complete:** NO-GO—delay launch by 4+ weeks; you're not ready
- **Download:** Pre-Launch Checklist PDF Link
- Tip: Focus on CRITICAL tasks first (legal, payment processing, offer finalized). Nice-to-haves (business cards, fancy graphics) can wait.



# 2. LAUNCH WEEK CONTENT CALENDAR & TRACKER

## WHAT IT IS:

A detailed 6-week content calendar (Week -4 to Week +1) with daily breakdown for launch week. Plan, write, schedule, and track all launch content in one place.

## **HOW TO USE IT:**

- 1.4 weeks before launch: Fill in the 6-week overview (content themes, # of posts per week)
- 2.2 weeks before launch: Write all captions, create all graphics/videos, add links to calendar
- 3.1 week before launch: Schedule all content in advance (use Later, Buffer, Planoly, or platform native schedulers)
- 4. **During launch week:** Post content, engage with comments/DMs, track engagement in "Notes" column
- 5. After launch: Review what performed best (save top posts for future launches)
- **Download:** Launch Content Calendar Google Sheets
- Tip: Batch-create all content 2 weeks before launch. You don't want to be writing captions during launch week—you should be engaging and selling.
- **Download:** Launch Week Content Calendar Google Sheets



# 3. LAUNCH METRICS DASHBOARD & DEBRIEF

# WHAT IT IS:

A comprehensive dashboard to track launch performance (revenue, customers, email performance, social media performance, traffic sources) and conduct a post-launch debrief.

# **HOW TO USE IT:**

- 1. During launch week: Update daily sales, email stats, and social media stats
- 2. End of launch week: Calculate totals, conversion rates, and ROI
- 3. Within 7 days of launch close: Complete the Launch Debrief section
- 4. Within 14 days of launch close: Schedule a 2-hour "launch debrief" session to document lessons learned
- 🛓 Download: Launch Metrics Dashboard Google Sheets Link
- Tip: Don't skip the debrief! This is where you learn what worked and what didn't—so your next launch is even better.



# **QUICK LINKS & TOOLS**

# LAUNCH PLANNING TOOLS

# **Conversion-Focused Page Builders**

- <u>Leadpages</u> Drag-and-drop landing page builder with templates, pop-ups, and alert bars (\$49-\$199/month)
- <u>Unbounce</u> Advanced landing page builder with A/B testing and conversion optimization (\$99-\$625/month)
- Carrd Simple, affordable one-page sites (free-\$19/year, perfect for solopreneurs)
- Wix Full website builder with drag-and-drop editor, templates, and e-commerce (free-\$159/month)
- Squarespace Beautiful, professional templates for websites and online stores (\$16-\$65/month)

# **Additional Page Builders**

- Instapage Enterprise landing page platform with personalization and analytics
- ClickFunnels All-in-one sales funnel builder (\$147-\$297/month)
- ConvertKit Landing Pages Free landing pages included with Kit email marketing plans

## **₩** LIVE VIDEO & WEBINARS

# **Webinar & Live Streaming Platforms**

- <u>Zoom</u> Video conferencing, webinars, meetings, and recordings (free-\$240/year, up to 1,000 attendees)
- <u>StreamYard</u> Multi-platform live streaming to Facebook, YouTube, LinkedIn, and more (free-\$49/month)
- Instagram Live In-app live video streaming (free, great for real-time engagement)
- Facebook Live In-app live video streaming (free, reach your Facebook audience instantly)

## **Additional Video & Webinar Tools**

- Restream Stream to 30+ platforms simultaneously (free-\$41/month)
- Demio Browser-based webinar platform (no downloads required, \$59-\$234/month)
- WebinarJam Live webinar platform with up to 5,000 attendees (\$499-\$999/year)
- Loom Quick video recording and sharing (free-\$12.50/month)

# **III** CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

#### **CRM Platforms for Small Businesses**

- <u>HoneyBook</u> All-in-one CRM for service businesses (client management, invoicing, contracts, \$9-\$40/month)
- <u>Dubsado</u> CRM for service-based businesses (proposals, contracts, invoicing, \$20-\$40/month)
- <u>HubSpot</u> Free CRM with sales pipeline, email tracking, and contact management (free-\$1,600+/month)
- <u>Salesforce</u> Enterprise-level CRM for large teams and complex sales processes (\$25-\$500+/user/month)



# **QUICK LINKS & TOOLS**

# **Additional CRM & Client Management Tools**

- <u>Pipedrive</u> Sales-focused CRM with pipeline management (\$14-\$99/user/month)
- Zoho CRM Affordable CRM with automation and analytics (free-\$52/user/month)
- Capsule CRM Simple CRM for small businesses (free-\$36/user/month)

# **ADDITIONAL LAUNCH TOOLS**

# **Launch Timeline Tracking**

# Use <u>Google Calendar</u> to block time for each launch phase:

- 90 days out: Pre-launch planning, content creation, audience building
- 60 days out: Sales page creation, email sequence writing, graphics design
- 30 days out: Waitlist launch, teaser content, engagement campaign
- 14 days out: Final content batch, testimonial collection, tech setup
- Launch week: Daily emails, live videos, engagement, sales tracking

## **Pro Tips:**

- Set recurring reminders for key tasks (e.g., "Write launch email #3" 2 weeks before launch)
- Color-code launch tasks (e.g., red = urgent, yellow = content creation, green = engagement)
- Use time blocking to dedicate focused work sessions to launch tasks

# POST-LAUNCH TASK MANAGEMENT

# Add all post-launch tasks to your project management tool (Trello, Asana, Notion).

Create a "Post-Launch" board with columns:

- To Do
- In Progress
- Complete

# PLATFORM STRATEGY

## **Focus on ONE Primary Platform**

Choose the platform where your audience is most engaged:

- Instagram: Visual content, Stories, Reels, engagement
- Facebook: Groups, Lives, long-form posts, community
- LinkedIn: Professional networking, thought leadership, B2B
- Email: Your #1 asset—you own your list, no algorithm changes

## **Cross-Post to Secondary Platforms**

- Share content to 2-3 secondary platforms (but don't spread yourself too thin)
- Repurpose content (turn Instagram captions into LinkedIn posts, Reels into TikToks)





# **Schedule Everything in Advance**

Use Later, Buffer, or Planoly to schedule posts.

#### **Books**

- <u>Launch by Jeff Walker</u> The definitive guide to product launches (seed launch, internal launch, JV launch strategies)
- Oversubscribed by Daniel Priestley How to create demand before you launch (waitlists, scarcity, positioning)
- <u>The 1-Page Marketing Plan by Allan Dib</u> Simple, actionable marketing strategy (perfect for solopreneurs)
- <u>Jab, Jab, Right Hook by Gary Vaynerchuk</u> Social media content strategy (give value, then ask for the sale)

## **Podcasts**

- Online Marketing Made Easy by Amy Porterfield Launch strategies, email marketing, course creation
- The Goal Digger Podcast by Jenna Kutcher Business growth, marketing tactics, mindset
- <u>Entrepreneurs on Fire by John Lee Dumas</u> Interviews with successful entrepreneurs (daily inspiration and strategies)

# **YouTube Channels**

- Amy Porterfield Launch strategies, course creation, email marketing
- Vanessa Lau Social media marketing, content creation, business growth
- Sunny Lenarduzzi YouTube growth, video marketing, online business



# **NEED HELP?**

ME EMAIL: HERCOLLECTED@GMAIL.COM

INSTAGRAM: @HERCOLLECTED

WEBSITE: HERCOLLECTED.COM

# **LAUNCH COACHING & CONSULTING**

IF YOU NEED HELP PLANNING OR EXECUTING YOUR LAUNCH, WE OFFER:

- LAUNCH STRATEGY SESSIONS (1-ON-1 COACHING)
- LAUNCH CONTENT CREATION SUPPORT
- LAUNCH WEEK ACCOUNTABILITY AND TROUBLESHOOTING
- POST-LAUNCH DEBRIEF AND OPTIMIZATION



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FOR PERMISSIONS, CONTACT:

HERCOLLECTED@GMAIL.COM

