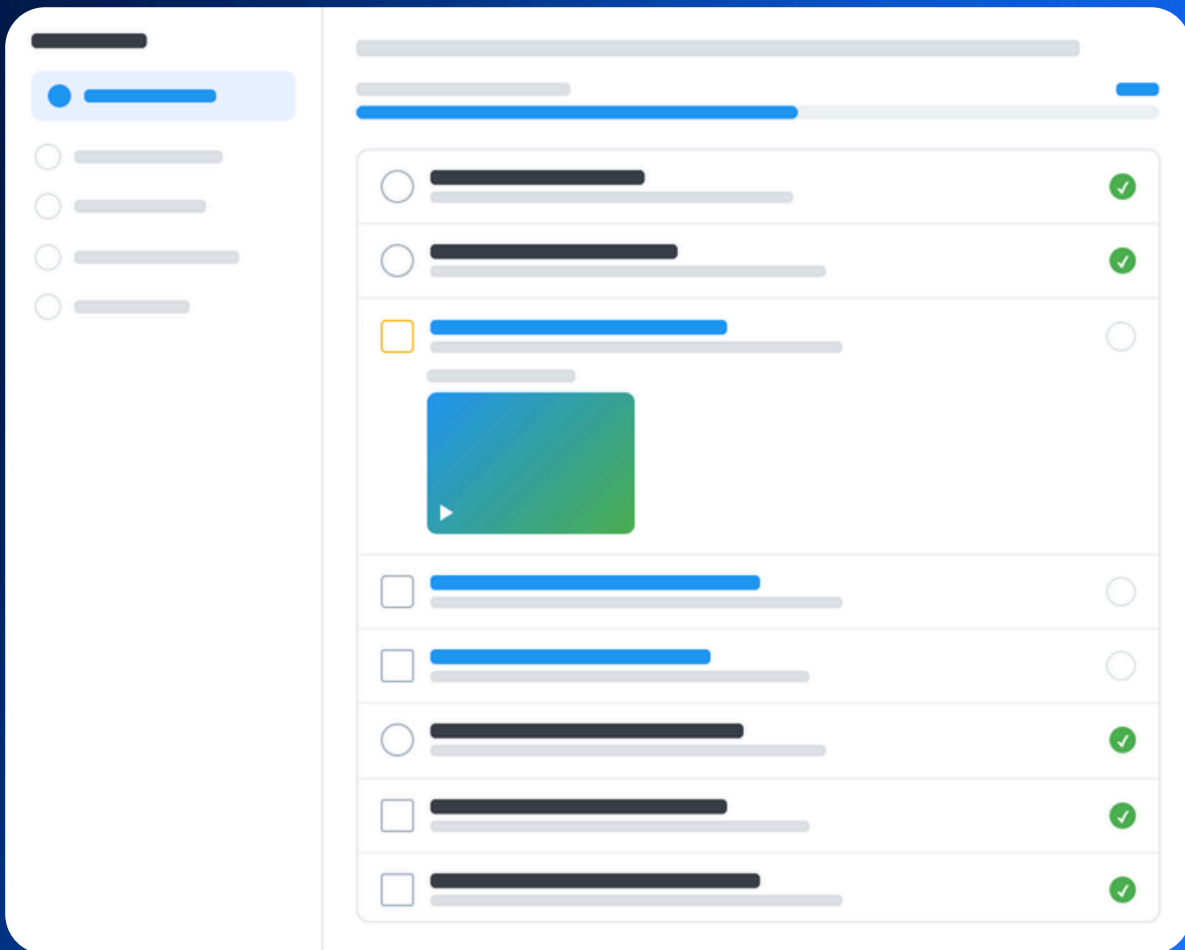


REFERENCE GUIDE

Feature Launch Pad

Your Fast Path From Zero To Using It



A complete companion for setting up contacts, communication, campaigns, your website, and payments.

What The Launch Pad Is

What It Is

The Launch Pad is a guided, step-by-step checklist inside your software that shows you exactly what to do first. Instead of guessing where to start, you work through five short sections, watching a quick video for each step and then doing it for real.

How It Works For Your Business

- You may need to search for Labs and turn it on if you do not see it yet.
- Once it is on, search for Launch Pad to open it.
- The five sections are Foundational Setup, Marketing and Lead Generation, Sales and Conversations, Website and Monetization, and E-commerce.
- Each step has a short video. Watch it, then go do that one thing in your own account, and the step marks itself complete.
- This guide follows the same order as the Launch Pad itself, so you can use it right alongside the checklist.

Done beats perfect. You are not trying to build something complicated, just something that works.

Foundational Setup

What It Is

Foundational Setup is the first Launch Pad section, and it gets three things in place: your first contact, a way to communicate with them, and your first campaign ready to go.

How It Works For Your Business

- The single biggest mistake is trying to set everything up perfectly before ever using it. Learning happens by using the software, not by studying it.
- By the time you finish the Launch Pad, you will have contacts in your system, a way to communicate, at least one campaign ready, a bookable calendar, and a way to get paid.
- If you have not completed your basic account setup yet, business profile, billing, and staff, do that first.
- Your software has two halves: your CRM, for managing people already in your world, and your marketing and automation engine, for bringing new people in.
- You will move between both halves throughout the Launch Pad. That is expected.

Foundational Setup – Tips & Guidelines

Tips

- Remember the phrase: done beats perfect. Your first contact, email, or funnel does not need to be flawless, it just needs to exist.
- Your CRM manages your people. Your marketing tools market to your people. That single sentence explains most of your software.
- Each Launch Pad step is a quick action, not a long training. If something does not make sense yet, skip it and come back later.
- In the next 30, 60, and 90 days, using the software consistently is what builds real confidence, not reading about it.

DO

- Watch the short video for a step before doing it
- Actually complete the task in your real account, not just the video
- Come back to a skipped step once you are more comfortable
- Treat 100 percent complete as a milestone worth noticing

DON'T

- Try to memorize every feature before you start
- Wait for a perfect moment to begin
- Skip Foundational Setup and jump straight to advanced features
- Worry about breaking something. You will not

Contacts

What It Is

Contacts is where every person you do business with lives: their name, phone, email, notes, and full conversation history. How you bring contacts in matters just as much as getting them in at all.

How It Works For Your Business

- Start with your warmest contacts first: current customers, past customers, active leads, and people who recently expressed interest.
- Warm contacts reply. Replies tell email providers you are a real sender, which protects your ability to land in the inbox instead of spam.
- Use a few simple tags, three or four, that reflect how you actually think about your business, like current customer, past customer, or warm lead.
- Leave an old, unused spreadsheet of contacts out of your first import. Stale lists hurt deliverability before you even get started.
- You can add a contact by hand or bring several in at once through an import.

Contacts – Tips & Guidelines

Tips

- Quality beats quantity for your very first import. A smaller, warmer list outperforms a larger, colder one.
- Keep your tags consistent across your whole list so filtering and bulk actions actually work later.
- A clean list today saves deliverability headaches for months. Do not import contacts you have not engaged with in years.
- Add a contact the moment you meet someone, while the details are still fresh.

DO

- Start with current customers, past customers, and active leads
- Use three or four consistent, simple tags
- Add new contacts as soon as you meet someone
- Clean out clearly dead or bounced emails before importing

DON'T

- Import every email address you have ever collected on day one
- Invent a brand new tag for every individual contact
- Ignore stale, years-old spreadsheets and import them anyway
- Leave a contact's owner field blank

Communication

What It Is

Communication ties your contacts to an actual channel. Once your phone and email are connected, along with your chat widget and social pages, every conversation lands in one unified inbox, no matter how someone reaches you.

How It Works For Your Business

- Connect your phone and email first. Without a channel, contacts in your system have no way to hear from you.
- Connect your chat widget, Facebook page, and Instagram business page so every DM and chat lands in the same place as your texts and emails.
- The unified inbox replaces juggling five different apps: email, Instagram DMs, Facebook messages, and two phones.
- Text messaging requires your phone number to be properly set up and registered before you launch a texting campaign, so messages actually deliver.
- The business that responds fastest usually wins, and one inbox is what makes a fast response possible.

Communication – Tips & Guidelines

Tips

- Set up your phone and its registration correctly before launching any text campaign, not after.
- Connect every channel you actually use. A channel you never check just adds noise.
- Check your unified inbox at least once a day so nothing sits unanswered.
- Fast replies are a competitive advantage, not just a nice-to-have.

DO

- Connect phone and email before your first campaign
- Add your chat widget and social pages to the same inbox
- Check your unified inbox daily
- Register your phone properly before texting

DON'T

- Launch a text campaign before your number is properly set up
- Leave a connected channel unchecked for days at a time
- Split your replies across five separate apps
- Assume a channel is connected without testing it

Campaigns

What It Is

Your very first campaign should not be promotional. It should be a short, personal engagement email sent only to your warmest contacts, designed to earn replies and build your sender reputation before you ever try to sell anything.

How It Works For Your Business

- Keep the first email simple: let them know you are on a new system, and ask them to reply so you know it came through.
- Every reply is a vote that tells email providers you are a legitimate sender. More votes early on means better deliverability later.
- Give your warm-up email a few days to collect replies before sending anything promotional.
- Once you are comfortable, drip campaigns automatically nurture leads with a sequence of messages over time.
- If automation feels like too much right now, it is fine to come back to it later. Get your calendar and basics set up first.

Campaigns – Tips & Guidelines

Tips

- Never send a promotional email as your very first message from a new system.
- Short, personal, and easy to reply to outperforms long and polished for a first send.
- Sending and receiving replies back and forth is what actually builds your trust score over time.
- Drip campaigns and automation are a great next step once your warm-up email has done its job.

DO

- Send a short, personal engagement email first
- Ask directly for a simple reply
- Wait a few days and watch replies come in before sending more
- Add automation once you are comfortable with the basics

DON'T

- Open with a sales pitch or a discount code
- Send your first campaign to your entire list at once
- Include links or attachments in a warm-up email
- Rush into automation before your first email has landed well

Website & Monetization

What It Is

You can build and launch a website right inside your software, attach a chat widget to it, and be ready to collect leads and payments without needing a separate website tool.

How It Works For Your Business

- A simple website with a chat widget lets visitors reach you the moment they land, instead of leaving without a way to connect.
- You do not need a fully built-out site to get value. Even a single page tied to your monetization tools is a real step forward.
- A funnel or website can include a store, a one-step order form, or a two-step order form, depending on what and how you are selling.
- You can also sell through membership courses by creating offers, which works alongside a website or funnel.
- Website and monetization work hand in hand with the payment options covered in the E-commerce section.

Website & Monetization – Tips & Guidelines

Tips

- Launch something simple first. A live page beats a perfect page that never ships.
- Attach a chat widget so a visitor always has a way to reach you.
- Match your page type to what you are selling: a single sales page, a full store, or a membership offer.
- You can always add more pages, products, or funnels once the first one is working.

DO

- Launch a simple website or landing page early
- Attach a chat widget to capture visitor questions
- Choose the order form type that matches what you sell
- Treat your first page as a starting point, not a final version

DON'T

- Wait to launch until the website feels perfect
- Skip the chat widget and lose easy conversations
- Build a full store when a single payment link would do
- Assume a website replaces the need for connected communication

E-commerce & Payments

What It Is

E-commerce is the final Launch Pad section, and it is where you get paid. There are three ways to collect money, and knowing which one to reach for first saves confusion.

How It Works For Your Business

- A payment link is the fastest option: set up a product, generate a link, and send it. Someone clicks it, enters their card, and you get paid.
- An invoice is more formal, with line items sent to a contact who pays it directly. It fits project-based or service work well.
- A full checkout page is used when selling a product or course through a website or funnel, using a store, a one-step order form, or a two-step order form.
- For most people just getting started, connect your payment provider first, then create one product. That gets you from zero to able-to-get-paid in about ten minutes.
- Once you are comfortable with a payment link, invoices and full checkout pages are natural next steps as your business grows.

E-commerce & Payments – Tips & Guidelines

Tips

- Connect your payment provider before you try to create a product or a link.
- Start with a single product and a payment link. Complexity can come later.
- Match the payment option to the sale: a quick link for one-off work, an invoice for project billing, a checkout page for a full product or course.
- Do not wait until everything else is finished to set up payments. It only takes about ten minutes to get the basics working.

DO

- Connect a payment provider first
- Create one simple product to start
- Generate and send a payment link for a real sale
- Explore invoices and checkout pages once comfortable

DON'T

- Wait for a full catalog before accepting any payment
- Build a complex checkout page before testing a simple link
- Skip connecting a payment provider and try to invoice anyway
- Overthink pricing before your first real transaction

Key Terms Glossary

Launch Pad

A guided, step-by-step checklist that shows you what to do first, one small task at a time.

Above The Line

The CRM tools for managing people already in your world: conversations, calendar, contacts, opportunities, payments.

Below The Line

Your marketing and automation tools: campaigns, workflows, websites and funnels, membership, reporting.

Foundational Setup

The first Launch Pad section: your first contact, communication channel, and campaign.

Sender Reputation

A score email providers build from engagement, especially replies, that affects inbox delivery.

Engagement Email

A short, personal, non-promotional first email that simply asks for a reply.

Unified Inbox

The single conversations view collecting every text, email, DM, and chat message.

Tag

A short label, like current customer or warm lead, used to sort and filter contacts.

Lead Ad

A Facebook or Instagram ad where a filled-out form flows straight into your pipeline.

Drip Campaign

An automated sequence of follow-up messages that nurtures leads over time.

Payment Link

A shareable link tied to a product that lets someone pay you directly.

Invoice

A formal, line-itemed bill sent to a contact for them to pay directly.

Checkout Page

A store, one-step, or two-step order form attached to a website or funnel.

Chat Widget

A live chat box on your website that lets visitors reach you instantly.

Funnel

A guided sequence of pages, like a sales page and checkout, built to convert a visitor.

Membership Offer

A paid course or content offer created and sold through your software.

Your First Week & Getting Help

1

Foundational Setup

Add your first contact, connect a communication channel, and send one warm-up email.

2

Contacts & Campaigns

Import your warmest list, tag it simply, and let replies build your sender reputation.

3

Website & E-commerce

Launch a simple page with a chat widget, connect payments, and create one product.

4

Use It Daily

Check your unified inbox, follow up, and keep moving through the Launch Pad's remaining steps.

You get out of it what you put into it. Done beats perfect, every single time.

Getting Help

- Keep this guide close as you work through the Launch Pad, and come back to it anytime you need a refresher.
- Take a specific feature training course whenever you are ready to go deeper on one area, like campaigns or payments.
- Reach out to your support team if you have a question this guide or the Launch Pad videos do not answer.