

CREATE YOUR ON-LINE HEALTH SUMMIT GUIDE

A Step-by-Step Guide to
Creating your On-line Health Summit



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WELCOME!

HI,
I'M JACQUELINE

"The aim of this Guide is to give you my step-by-step process to bring your dream of creating an online Summit into reality."



I'm so excited to have you here and I can't wait to share with you my lessons and experiences in putting together and bringing to life an online Health Summit.

I am a Menopause Educator and Coach, Hormonal Health Specialist, Yoga for Women's Health Teacher and in my "spare time" I also build websites.

In 2022, I realised my vision of bringing my unique Menopause and Women's Health message to a larger audience by creating and hosting **The Menopause Summit**.

The response to that summit far exceeded all my expectations and I have now committed to making it an annual event.

To bring that Summit to life I created every single piece of content myself and used easy and accessible tech platforms, with some tech support from my Virtual Assistant.

I created the landing pages, the graphics, figured out which tech was best for recording the videos, wrote all the emails and coordinated with the speakers, established the registration process and email sequences, plus all the content for launching and promoting the Summit..... yes it was a total Labour of Love!

Since putting this all together, Health Coaches and Women's Health specialists have been asking me how I did it. I realised that I have a wealth of learned experience, knowledge and information to share that could help YOU bring your dream of running a Summit to life.

So I decided to put it all together for your benefit! In this guide I share my step-by-step proven process, including templates and platforms that worked for me. I try to make everything as EASY as possible and as low-tech as possible. You can ALWAYS throw more money at these things and make things more complicated and use "better" tech. But for many of us we just want to get our message out there in the most professional way with the least barriers to entry.

So let's just jump straight in and get a start on your journey to creating an online Summit!



BRAINSTORMING

You've decided you want to create an on-line Summit. You have been thinking about doing this for ages, but you don't know how or where to start and you have just been procrastinating for so long. The more you think about it, the more the fear and doubt builds.

STOP! TAKE A BREATH. CLOSE YOUR EYES

Let's reconnect with your passion, with the WHY you want to do this.

What is your mission, your message, how are you helping your audience by deciding to do this?

Now its time to do a brain dump and get your thoughts down on paper.

MY
GOAL:

MAIN
MESSAGE

TARGET
AUDIENCE

FORMAT
OF THE
SUMMIT

COLLAB-
ORATION

OTHER
THOUGHTS



EXTRA QUESTIONS



Other things to think about before you get started:

1. How many speakers do you want in your Summit?
2. When do you want to run it (time of year)?
3. How many days will your Summit last?
4. Will it be live or pre-recorded?
5. Will it be a free Summit or are you charging for participation?
6. What terms and conditions will you have for speaker participation?
7. What existing platform are you using and are these appropriate for promoting your Summit?
8. Do you need to explore other platforms to house your Summit? Do you have the knowledge to work them? Do you need help?
9. Will you need extra tech/graphic/content support to bring your Summit to life?





WHAT TECH DO YOU NEED?

Before you get started you need to have a few tech platforms in place so that you can run your on-line Summit.

- Emailing platform
- Landing page platform (it's advisable to use the same as the emailing platform)
- Video storage platform (if you are doing a pre-recorded Summit)
- Graphics platform
- Presentation platform (like Zoom or Facebook) if you are doing a live Summit.



GOALS

Think about some of the metrics that you want to achieve through the summit. These should be used as a guide to help you measure your "success".

HOW MANY PEOPLE ARE YOU HOPING WILL REGISTER	
HOW MANY PEOPLE WILL PURCHASE THE UPSALE SUMMIT PACKAGE	
HOW MANY VIEWS OF EACH SESSION DO YOU ANTICIPATE	
NUMBER OF RESPONSES TO A FEEDBACK FORM	
HOW MANY NEW CLIENTS PURCHASING YOUR OFFER	

Other things to think about: reach of promotion posts, new leads, engagement, followers on social media platform, positioning as an expert, collaboration opportunities.



STEP-BY-STEP GUIDE

Below is your check list of things to do to get your Summit from an idea in your head to become a successful on-line event!

We will delve deeper into each step in the following pages.

STEP 1	Identify your speakers
STEP 2	Email sequence for speaker communications
STEP 3	Prepare Graphics
STEP 4	Prepare Landing Page
STEP 5	Prepare pages for each day of Summit
STEP 6	Registration welcome email
STEP 7	Email sequencing for registrants
STEP 8	Record Interviews with speakers
STEP 9	Upload Interviews onto platform
STEP 10	Decide about Upsale (purchasing the Summit)
STEP 11	Promote and advertise/ launch Summit
STEP 12	Summit Time
STEP 13	Post Summit Follow up
STEP 14	Post Summit Review



STEP 1

IDENTIFY YOUR SPEAKERS



Choosing your speaker list is going to be one of the hardest but most important things you do for your Summit.

Choosing your speakers is all about finding the right experts to collaborate with! This is a strategic decision. You need speakers that you connect with, have "chemistry" with, speakers that you can have an interesting conversation with, and most importantly have a message that reflects the mission of your Summit and provides valuable information to your audience.

How do you find speakers?

Networking.

Put out a speaker request in relevant Facebook groups.

Put out a speaker search request on your other social media platforms.

People that you follow or listen to.

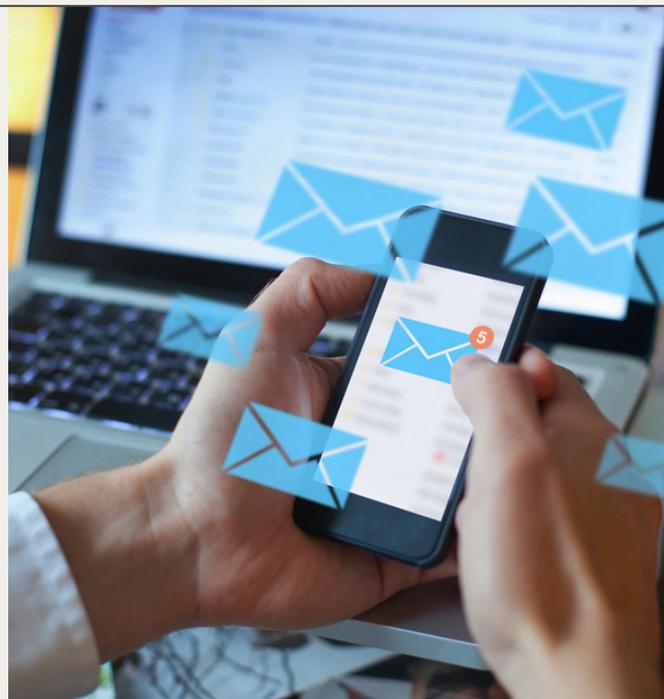
People who you have heard at other summits.

Create an excel spreadsheet of the names, their title, area of interest etc.



STEP 2

EMAIL SEQUENCE FOR SPEAKER COMMUNICATIONS



Once you have your list of speakers you need to keep in touch with them and share relevant information.

I have build an email sequence of important information to be shared with your speakers at different stages of the Summit process.

In addition you need a really good spreadsheet to keep track of your speakers, their interview topic, their contact information, the interview details, video link etc. You are going to be getting a lot of information from your speakers and you need to keep it clear and organised.

Below I share all this information.

The welcome email is one of the most important and will contain the most information. This email should include:

Welcome greetings, information about how the Summit is going to work, dates, schedule interview times and tech details, promotion requirements, special offer promotion that they are offering/freebie, affiliate links if relevant, terms and conditions for participation.

You also want to ask them for a headshot, links to their social media platforms, details about their topic, and potential questions you want to ask. You may choose to ask them to sign a contract as part of their commitment to the Summit.

Platform or Tech Required: I recommend that you write out your emails first in a document so you create a template document that you can re-use. Then you use your email provider to send them out. I personally prefer to send them out from my "personal" email rather than an email list platform, so that it is more personal.



SPEAKER EMAIL SEQUENCE

#1 WELCOME EMAIL TO SHARE WITH EVERY SPEAKER

#2 FOLLOW UP EMAIL - CONFIRM DETAILS OF SUMMIT, PARTICIPATION, COMMITMENT AND INTERVIEW TIMES

#3 INTERVIEW DETAILS CONFIRMATION - INCLUDING ZOOM LINK

#4 HERE IS YOUR PROMO MATERIAL - INCL. ALL THE GRAPHICS. THIS IS WHERE YOU WANT TO REMIND YOUR SPEAKERS ABOUT SHARING THE SUMMIT DETAILS AND ENCOURAGING THEIR AUDIENCE TO REGISTER.

#5 UPDATE ABOUT LAUNCH AND REMINDER TO PROMOTE

#6 HERE ARE DETAILS ABOUT YOUR SESSION (TIME AND DATE) PLS SHARE

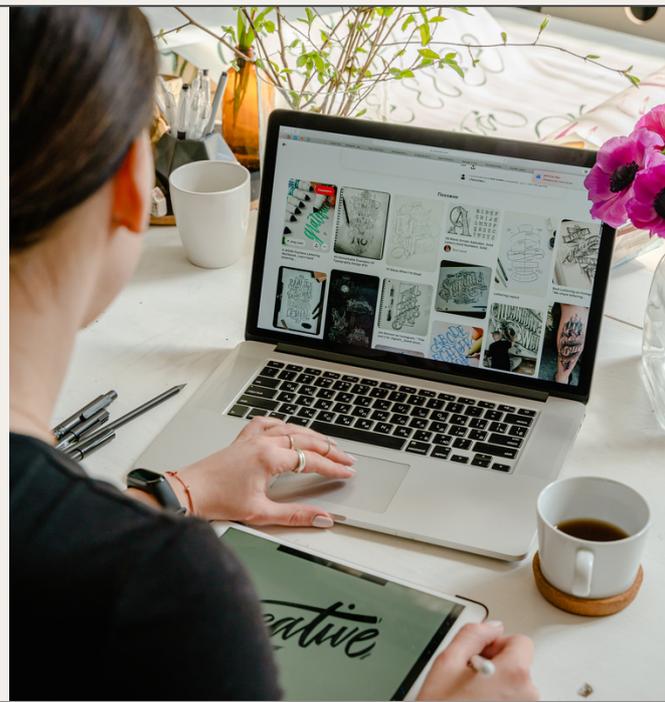
#7 POST SUMMIT - THANK YOU AND FEEDBACK

REMEMBER: TO KEEP TRACK OF YOUR EMAILS CHOOSE RELEVANT SUBJECT TITLES. IF YOU ARE SENDING THE EMAILS OUT FROM YOUR EMAIL ACCOUNT CREATE A SEPERATE FOLDER FOR ALL SUMMIT CORRESPONDENTS.



STEP 3

PREPARE GRAPHICS



Before you can prepare your landing page, promote the Summit or ask your speakers to share it, you need to create some graphics for the Summit.

Recommended Graphics

- Summit logo
- general flyer for social media posts (in all different sizes and resolutions for use across platforms)
- personalised flyer for sharing with each speaker (with their headshot) so that they can promote on their platforms.

All graphics should have Name of Summit, logo, dates, times and details of how to register.

Platform or Tech Required:

The easiest way to prepare graphics is using Canva. You can use either the free platform or the paid version. The paid version allows you to resize graphics so that you can easily adapt them for different platforms.



STEP 4

PREPARE LANDING PAGE



Your landing page (including welcome message and registration form) is where your audience gets it's first look at your Summit.

What is it about, who is it for, what are they going to learn, details about the speakers. Basically.....**Why they should attend!!**

All this information needs to be clearly presented.

You will need to add some clear messaging and explanations, graphics, a logo, headshots of each speaker, session title and details.

The landing page will also include a registration form/box which should link up to a thank you page and trigger the first Welcome email for participants.

The most important thing about a Summit landing/welcome page is to focus on the mission of the Summit and the value that the participant will receive!

Platform or Tech Required: Choose a landing page platform that has the ability for tagging people who register and to enter all registrants into the Summit email sequence. Examples include ActiveCampaign, Covertkit, Mailerlite, Mailchimp, HubSpot. If you are happy with your existing platform use it! Don't start moving to a new one just for your Summit.



STEP 5

PAGES FOR EACH DAY OF THE SUMMIT



Once you have prepared your landing page you can start to build the infrastructure for the "daily content pages" for each day of the Summit.

Each day you will be sharing that day's content (interviews, sessions, recordings, freebie links etc) and you need to have a way to direct your audience to the container that houses this content.

If your Summit is live you will need a pre-set link that you can share with your audience in their daily email alerts (for example, Youtube link, Summit Facebook group, Zoom link)

If your Summit is pre-recorded then you need to have a place to house all your pre-recorded interviews like Youtube or Vimeo. You can then add links for each day's sessions either in your daily emails or to a dedicated Summit Page.

Choosing a pre-recorded Summit or a Live Summit will depend on how you do this will depend on how much time, energy, effort, know-how and tech support you have.

Platform or Tech Required: What you need will depend on if you are doing the Summit live or pre-recorded. Possible platforms include: Zoom, Youtube, Vimeo, Landing page Platform, Facebook group.

STEP 6

REGISTRATION WELCOME EMAIL



Once your Summit landing page is set up it will contain a registration form/box. Everyone who wants to join the Summit will register via this "submit" form. Once someone clicks on "submit" it should activate a couple of things:

1. A thank you and confirmation notification
2. A welcome email sent to the participants inbox
3. Tagging the participant within the email platform as a Summit participant.
4. Adding the participant to the Summit's email sequence.

The first email should arrive into their inbox within minutes. This is their welcome email and will contain all the details about the summit. Dates, times, location, price (if relevant). For other emails in the sequence see below (Step 7).

Platform or Tech Required: You need to write out your emails first in a document so that you have them saved as templates. Then you use your email provider to send them out. You should be using the same landing page and email provider one that you are using already (see Step 4 for recommendations) so that you can keep track easily, tag registrants, and have email sequence automation set up.



STEP 7

EMAIL SEQUENCING FOR REGISTRANTS



Keeping in touch with your audience once they have registered for the Summit is crucial.

You will send them emails in the lead up to the Summit, during the Summit and then in the days following the Summit.

You want to engage with them, nurture them, tell them how transformative the Summit is going to be, how the Summit helps them get the results they want and ask them to invite their friends to register.

Of course the emails also need to clearly share the relevant information about the Summit - dates, times, how to access the content, details about the speakers, how to purchase it (see Step 10).

The email sequence is also a chance for you to position yourself as the host of the Summit and you can add some extra information so that they can get to know you better.

Below is a recommendations of emails to send in the sequence.

Platform or Tech Required: You need to write out your emails first in a document so that you have them saved as templates. Then you use your email provider to send them out. You should be using the same landing page and email provider one that you are using already (see Step 4 for recommendations) so that you can keep track easily, tag registrants, and have email sequence automation set up.

PARTICIPANT EMAIL SEQUENCE

#1 WELCOME EMAIL AFTER REGISTRATION WITH ALL SUMMIT DETAILS

#2 3 DAYS AFTER SIGNING UP - LET ME ANSWER YOUR QUESTIONS, THINGS YOU SHOULD KNOW ABOUT THE SUMMIT

#3 ONE WEEK NOTICE - INVITE YOUR FRIENDS

#4 MEET YOUR SPEAKERS - INTRODUCE SOME OF THE EXPERTS

#5 24 HOUR EMAIL NOTICE - SUMMIT STARTS TOMORROW

#6 DAILY EMAILS - DAILY SUMMIT CONTENT EMAILS. EACH DAY SHOULD HAVE IT'S OWN EMAIL SCHEDULED WITH LINKS FOR VIEWING THAT DAY'S CONTENT AND ANY PURCHASE INFORMATION YOU NEED TO SHARE.

#7 POST SUMMIT - LIMITED TIME BONUS VIEWING AND ANY EXTRA CONTENT AND PURCHASING INFORMATION

#8 POST SUMMIT - THANK YOU AND FEEDBACK

REMEMBER: IF YOU ARE ALSO OFFERING THE SUMMIT AS AN UPSALE (BETTER ACCESS FOR PAYMENT) YOU NEED TO CLEARLY INCLUDE THIS INFORMATION IN YOUR EMAIL SEQUENCE.

YOU WILL NEED TO ADD CONFIRMATION SALES EMAIL TO YOUR SEQUENCE FOR THOSE WHO PURCHASE THE SUMMIT.



STEP 8

RECORD INTERVIEWS WITH SPEAKERS



You are now at the fun part!! Having the conversations that are going to make your Summit unique!

Hopefully you have chosen interesting and relevant speakers and you will be able to lead them in a fun, enjoyable and informative conversation.

If you are running your sessions live, make sure that both you and your speaker get online a few minutes BEFORE the scheduled time. Check lighting, sound, tech etc. Even if you are running the Summit live, you should still record each session so that you have it available for future use.

If you are pre-recording your sessions make sure that you remember to hit record when both you and your speaker are ready. Again you should check lighting, sound and any other tech before you start. Make sure you have confirmed where you are recording the interview, where you need to upload it after and that it is saved somewhere.

Remember give your speaker the opportunity to share their expertise and make sure that you keep the conversation on track with the mission, goal and agenda of the Summit.

TIP: It is advisable to ask your speaker for some guiding questions that they would like to answer prior to your interview session. This will help you to stay on track with your interview and to make sure they talk about their area of expertise.

Platform or Tech Required: All your recording equipment and video storage platform.



STEP 9

UPLOAD INTERVIEWS ONTO PLATFORM



If you are creating a live Summit, you should still download the interviews and store your videos. You never know if and when you may need them in the future and it would be a shame for the content to disappear.

If you are pre-recording your Summit interviews you will probably use Zoom (or a similar platform) as the recording platform. You will then need to decide on a platform to house all your interview sessions. This could be Youtube, Vimeo or another platform like Kajabi or Thinkific.

You can choose to upload all the content in one place and then share the relevant session links with your audience in their daily emails.

Or you could choose to create daily Summit pages with the video content for THAT specific day and share the page link with your audience in th daily email.

Platform or Tech Required: Primary recording platform and content storage platform. Plus daily content landing pages. All of these platforms should already be in place by the time you get to uploading your video content.



STEP 10

DECIDE ABOUT UPSALE



Your Summit may be totally free to attend.

If that is the case, then usually once the summit is over the content becomes unavailable to the audience.

However you may decide that you want to ALSO offer an upsale option.

This means that for a price, participants get full access to ALL the sessions for a specified period of time (month, year, unlimited).

In order to offer this, you will need to prepare a check-out page after registration and have a payment option available.

If you choose to not make your Summit free, then you will need to ensure this is clearly explained in your marketing and messaging (on Landing page, emails and social media posts).

Also clearly explain the upsale benefits so the participants know what they are getting for purchasing the Summit - for example is there any extra bonus material they may receive, how long will they have access to the sessions for etc.

You will also need to add an extra email to your sequence for those who purchase the Summit.

Platform or Tech Required: A checkout page and payment options. You need a good system that will clearly keep track of everyone who has paid to enable you to write receipts, which can usually be automated.



STEP 11

PROMOTE AND ADVERTISE/ LAUNCH



Most people think this is the easy part!
But actually there is plenty of strategy and thought involved here!

Firstly, give yourself enough of a launch/promo time - anywhere from 3-4 weeks is typical.

Create a bunch of promo posts that can be used across platforms and reposted. Use content from your Summit landing page. You can share these posts with your speakers too.

Share your promo posts on all your social media channels, in your newsletters and in Facebook groups that allow promotion.

Remember: You asked all your speakers to help promote this Summit. Stay engaged with them to make sure they are doing this. You have shared the graphics with them, you asked for their commitment to promote the Summit as part of the terms and conditions of them being a speaker. Their "price" for free publicity in being a part of this Summit is that they promote this event to their audience! Make sure that you also tag them in your posts!

You may want to share teasers from your interviews if they have been pre-recorded.

You may want to do some IG stories or go Live in Facebook and talk about the Summit as part of your promo launch.

There are so many ways to promote your Summit during the launch period, but **STAY CONSISTENT** and keep promoting. Don't think people are getting fed up or seeing and hearing you talk about it!!!

Platform or Tech Required: Existing social media platforms.



STEP 12

SUMMIT TIME



Hopefully all your work has paid off and the Summit will go off smoothly.

If you are running this Summit Live, make sure that you have cleared your calendar for the duration of the Summit. The mental head space, energy and emotions of running this event live can be very draining and won't leave you with much time for anything else.

If you have pre-recorded the sessions and set up all the email automation you can sit back and enjoy! However make sure you are on hand every day when your emails go out in case links don't work, or someone hasn't received their email and are waiting for it. However much you have prepared and automated things, something usually happens that requires your attention during the Summit.

If your Summit is Live and you have recorded the interview you may decide to also send an email in the evening with a limited viewing time of the day's sessions (Remember to include the link for viewing!).

TIP: Participants may not receive emails as there is always a percentage that go into SPAM or the Promotions Folder. You can address these issues **before** the Summit by making sure that participants are expecting their welcome email once they have registered. You should let participants know that if they DO NOT receive their welcome email they can contact you directly to check why not.



STEP 13

POST SUMMIT FOLLOW UP



WELL DONE - Your Summit was a great success.
But it's not over yet!!

Now you enter into the Follow-Up stage of the Summit! This is where you learn lessons from feedback, nurture potential clients and let your audience know how you can help them!

Follow up with:

1. Your speakers.

Let them know how their session was received, did you or they hear any feedback, how many views did their session get? Give them some data from the Summit (like number of participants) so that they can feel they were part of something AMAZING!

2. Your audience.

Make sure that you send a couple of follow up emails.

Talk about the success of the Summit.

Ask for feedback (I highly recommend making and sharing a feedback form in google), sell your services.

Do you want your audience to now join a facebook group or do you have another call to action?

This is where you have the most potential of attracting new clients or offering your most attractive services. Your audience is HOT and wait to know how you can help them!



STEP 14

POST SUMMIT REVIEW



Now that you have some time to rest and absorb what you just created, it's time to do a review. The review should also include analysing the feedback survey that you sent out as part of your follow up.

What worked?
What didn't work?

What would you change next time?
How could you improve things?

Did you choose good speakers?
Did you hit your metrics?

How can you improve the tech?
Do you need extra support?

What was the feedback like from participants.
Did they like the topics covered? Was something missing?

What are your biggest lessons?

Asnwering these questions will help you create an even better Summit next time!





*WELL
DONE!*

I am so proud of you for committing to this journey.

I hope that you have enjoyed creating your online health Summit and that you made great connections, gained momentum in your business and have been able to position yourself as an expert in your field.

What happens now?

Now you can call yourself Founder and Host of your Summit!
This is a major marketing win for you and will raise your profile.

If you have any questions feel free to reach out to me.
I also invite you to follow me on my social media channels!

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