

Client Name:

Portal Subscription Level:

Start Date:

End Date:

What days/times are you setting aside to build your business with the portal?:

Check off with an "x" what you have before beginning the portal:

Business Model:

Offer:

Social Media Pages: X, need to change name

Calendar:

Email Tools:

Other tools:

The portal is organized by Order of Operations.

The portal MUST be done in order for effective learning and business building.

OPERATIONS 1: Branding

- **Establish a brand identity**
 - **Clarify colors, emotions and personality of brand**
 - **Create targeted niche**

OPERATIONS 2: Marketing

- **Building processes to support:**
 - **Lead generation**
 - **Campaigns**
 - **Data collection**
 - **Funnels**
 - **Website conversions**

OPERATIONS 3: Sales

- **Creating sales communications and flows**

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Is there anything you would like me to add to the portal for your experience?

[View our curriculum to see the content coming to the portal in June 2020](#)