

The

DEFINITIVE GUIDE

to

Program Design & Upservicing

TRAINING
DONE 4 YOU
CONSULTING
SPEAKING

the
Martini
way



Welcome

You downloaded this report because you have an interest in Program Design or, perhaps you're simply wondering what "Upserving" means.

Let's start with Program Design. . .

Offering clients, customers or patients a program – whether group or private – in order for them to better consume, absorb and implement your information than they could do simply via a webcast, webinar, ebook or single sessions.

The ultimate question is "How" – How do you create a program which best serves your clients, customers and patients while simultaneously meeting your needs as a business owner?

You see, what often happens is that business owners create the program that they'd be interested in, the one that *they* want to create, regardless of what their ideal audience will actually pay for.

And that's the first, and biggest, mistake business owners make when creating new programs, products or services.

The end result? You invest your time and energy in creating a program which no one buys. It fails on all sides:

- You've spent time and energy with no return on your investment
- Your clients, customers and patients aren't served/helped in the way you'd planned or hoped

Let's talk about "Upserving".

You understand the concept of customer service. If you've been in my community for any length of time, you likely know (and hopefully practice) Extreme Client Care™ (www.ExtremeClientCare.com).

"Upserving" is the practice of Extreme Client Care™ through your program design, development and fulfillment.

Clients expect to be taken care of, depending on their past experiences with companies – big, small, recently, years ago – depends on what level of “care” they’re inherently expecting from you.

You can’t control how they enter your relationship. You can control the care they receive once they enter your business/your world.

That takes us back to “Upserving” – serving them better than they’re expecting and doing it *by design* rather than happenstance.

The Guide, this workbook, is all about designing your program and incorporating upserving via the principles of Extreme Client Care™ throughout the process.

Ready? Let’s jump in!

Abundantly yours,

Sandy 😊

Sandra Martini
Business & Client Care Advisor

Identify Your Business Assets

Before we go into detail about designing your next program, product or service, let's first see what assets you already have – usually sitting on your hard drive.

List everything you've previously created:

- Brochures
- Ebooks
- Programs
- Special reports
- Journals
- Group experiences
- Webinars/Webcasts/Teleseminars
- Podcasts
- Videos
- Anything else?

List below:

Put a number next to each of the items you listed above (#1, 2, 3, etc.). Now group your programs, products and services by category by entering the appropriate number into each box below (we're using the number system simply to conserve space).

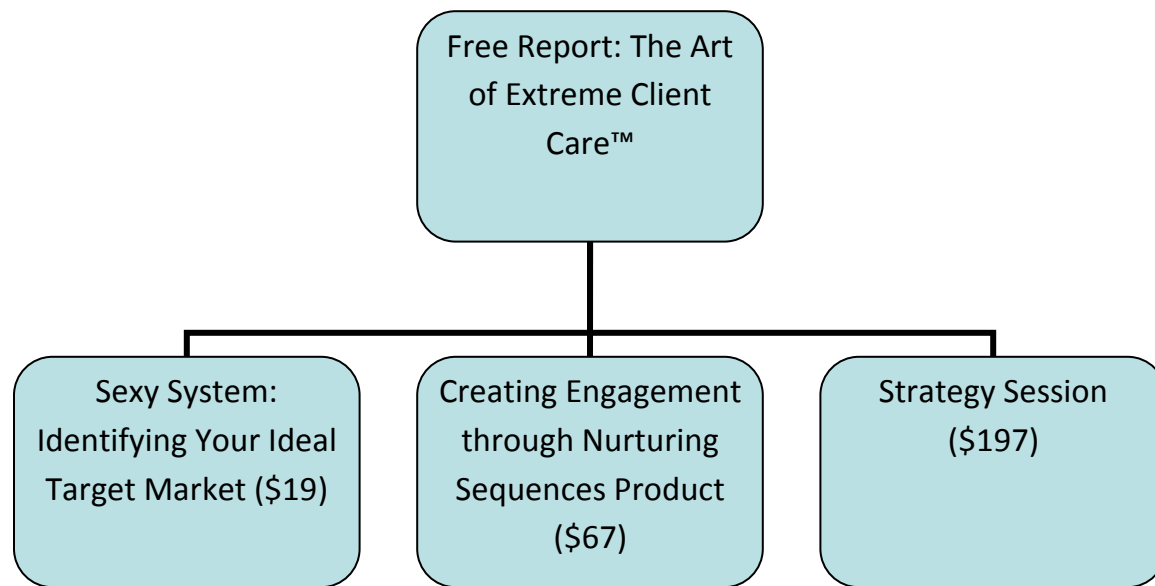
So if you had a free special report with the number 1 next to it, it would go under the "FREE" column below.

FREE	\$1 - \$49	\$50 - \$99	\$100 - \$299	\$300 - \$499	OVER \$500

Put an asterisk by anything above that's not 100% complete. Make a note of it below so you can get it on your calendar to finish based on your schedule.

Now it's time to create your Product Organization Chart™ – just like an Employee Org Chart, a Product Organization Chart™ shows the potential relationship between products.

Think of all your programs, products and services as pieces of a jigsaw puzzle and the Product Organization Chart™ puts those pieces together in a way that becomes a natural flow from free to XXX (“XXX” depends on your product offerings).



The free report can go direct to any of the above products or programs OR it can go direct to the Target Market product and then from there to Creating Engagement and then the Strategy Session (or can skip Target Market or Creating Engagement altogether).

It's about putting things together in such a way that your nurturing sequences (autoresponders) make sense based on what your client, customer or patient has already invested in/opted into.

Your turn. . .picking items from as many of the categories as makes sense in the above table, create your own Product Organization Chart(s)[™].

What, Why and Who?

Starting with everything you've done so far, take the next few pages to review one of your programs (or create a new one) which fulfills the want and serves the needs of your ideal target audience.

Which program, product or service do you want to "fill"? It's almost always easier to start with one and move forward from there. This is the same process you'll use for every program, product or service you consider.

What's your program, product or service name (or working name):

WHY are you hosting (planning to host) this program, creating this product or offering this service?

- | | |
|--|--|
| <input type="checkbox"/> Revenue generation | <input type="checkbox"/> Increase credibility |
| <input type="checkbox"/> Increase exposure | <input type="checkbox"/> Seed a larger program |
| <input type="checkbox"/> Serve a need in market/industry | <input type="checkbox"/> Fulfill a desire/want in market |

If a different reason, what is it?

Identifying Your Program Ideal Client

Not all of your ideal clients are ideal for this program, product or service. They may be in a slightly different place in their business or life, they may be at one end of the revenue spectrum, they may have purchased from/invested with you before (or not), etc.

Every program, product and service should be designed/created for a specific ideal client.

For example, if you're a massage therapist, your ideal client for a particular service package could be:

Stay-at-home mom with chronic neck and shoulder pain
(for package which includes middle-of-day appointments)

OR

Holistic-minded woman who enjoys aromatherapy
treatments and embraces frequent massages as part of
her overall health (for pampering packages which include
products)

Who, specifically, is your ideal client for *this* program, product or service?

Want assistance identifying your Ideal Client? [Check out our Exercise Guide here.](#)

Program Design

Before we get into the actual program design, first let's be sure your content will be compelling to your ideal clients.

For those newer in business (say, less than a year), I recommend creating several mini-content offers, each targeted to a specific topic -- this way you'll discover what your audience is looking for.

Surveys are great, but "wallet votes" are so much better. "Wallet votes" are my definition for when someone selects something by investing in/purchasing it.

For everyone else, I recommend developing content that educates (always!) and simultaneously showcases you as the credible expert in your area.

The simplest way to do the above is to make 3 lists:

1. What are the most common questions you receive from your prospects?
2. What do you wish your prospects would ask you?
3. What do you see your customers, clients, patients and prospects complaining about (particularly again and again) – social media is a great place to research this.

Schedule a time on your calendar now to make these three lists and/or do as I do, keep a tabbed notebook and jot them down whenever they come up. Put stars next to the repeats.

Go ahead and get started. I'll wait.

Got your lists?

Good...now 3 more things to do

1. Now pick one segment (demographic) of your ideal client profile.

For me it could be: Women business owners age 45 and higher who are thinking about retirement and wanting to build a long term passive revenue stream which requires less than 10 hours/month to keep it going.

Which demographic did you pick?

Now create content specific to this one demographic.

In my Strategic Marketing & Calendar System (www.TheMartiniWay.com/CalendarSystem), I share how the most successful businesses view the year in four quarterly chunks and base their business focus and projects around those four quarters (which can be any set of 3 consecutive months: January, February and March or May, June and July).

Same thing's true here.

If you don't yet have content, spend a quarter – a full three months – creating content for that demographic:

- Blog posts
- Social media posts and images
- Free giveaways – infographics, ebooks, booklets, videos, whatever you're inspired to do

2. Build Your Escalators (or Funnels)

Grab your Product Organization Charts™ and sketch out what the opt-in, sales/info, thank you, and fulfillment pages – not the full content of these pages, just the flow of what you want, including any upsells that you'd like to build in.

For example:

- Free giveaway page (such as the one at www.ExtremeClientCare.com or the listing at www.TheMartiniWay.com/browse) which leads to
- Offer for low-priced item related to the report – the low-priced product must relate in some way to the free giveaway (DUH!, but it never hurts to state the obvious).
- Follow-up on the free giveaway and the low-priced product with engaging nurturing sequences (see [Creating Engagement through Nurturing Sequences](#) if you're unsure of how to do).

3. Be Different

Forgetting the “you’re unique and so have no competition” BS many spout. While it’s true that each of us are unique, reality is potential customers and clients don’t know our uniqueness from Competitor A’s and so rely on our marketing and offers to make their decisions – and THEN on the experience we provide and whether or not they decide to “get to know us better”.

How will your offer be different?

The simplest way, for those in the online world, is to do something offline (I know...you’ve heard this from me several times before, but ARE YOU DOING IT?).

Look at what others in your industry are doing and ask yourself “What AREN’T they doing?” and “How can I do that?”

Your revenue, and resulting profits, will thank you.

Once you have content, you’re ready to design your program.

Overall Objectives (a.k.a. “The Goals”)

Now that you’re clear on WHY you want to offer the program and WHO you want to offer it to, it’s time to determine the overall objectives (the goals) for you and your program, product or service clients.

First, your clients.

After investing in your program, product or service AND doing any work associated with that investment (attending the calls, reading the ebook, doing the work, delegating the tasks,

wearing the jewelry, showing up for the healing session, etc.), what results will your client walk away with?

In other words, what are they going to “get” as a final result of investing in your program, product or service? What “want” or “pain” will your program, product or service cure?

For example, if you’re a hair stylist, they may get a boost of self confidence in knowing that they look fabulous.

What are *your* goals for this program, product or service (see “Writing Goals” later in this Guide)?

- If Revenue, how much?
- If Number of participants, how many?

- If signups into a higher level program, what conversion rate? (This is called “seeding”.)
- If profits, what percentage/how much in dollars?

You can, of course, have more than one goal for your program, product or service. If you do have more than one goal, which one is the most important, or primary, goal?

This is needed for when (not “if”) conflict among goals arises, there has to be one goal which is your ultimate desired result.

What “form” will your program, product or service take? Here are some examples to get you thinking:

Program	Product	Service
<input type="checkbox"/> 1-on-1 <input type="checkbox"/> Membership <input type="checkbox"/> Group <input type="checkbox"/> Continuity <input type="checkbox"/> Fixed term membership	<input type="checkbox"/> Digital <input type="checkbox"/> Hardcopy/Physical <input type="checkbox"/> Audio <input type="checkbox"/> Video <input type="checkbox"/> Multimedia <input type="checkbox"/> Include/exclude time with you for Q&A <input type="checkbox"/> Follow-up	<input type="checkbox"/> Done For You <input type="checkbox"/> Consultancy <input type="checkbox"/> Assist/Teach Client <input type="checkbox"/> Certification Training <input type="checkbox"/> Single project <input type="checkbox"/> Retainer <input type="checkbox"/> Hourly <input type="checkbox"/> Flat rate <input type="checkbox"/> Packaged services <input type="checkbox"/> Outsourced “employee”

Write the format for your program, product or service below.

How will you deliver your program, product or service? Here are some examples for inspiration.

Program	Product	Service
<input type="checkbox"/> Live, in person <input type="checkbox"/> Telephone <input type="checkbox"/> Webcast <input type="checkbox"/> Webinar <input type="checkbox"/> Ruzuku <input type="checkbox"/> Autoresponder <input type="checkbox"/> Snail mail <input type="checkbox"/> Email	<input type="checkbox"/> Digital <input type="checkbox"/> Hardcopy/Physical <input type="checkbox"/> Audio (online vs CD) <input type="checkbox"/> Video (online vs DVD) <input type="checkbox"/> Multimedia (online vs DVD) <input type="checkbox"/> Shipping <input type="checkbox"/> In person	<input type="checkbox"/> Live, in person <input type="checkbox"/> Social media <input type="checkbox"/> Telephone <input type="checkbox"/> Webcast <input type="checkbox"/> Webinar <input type="checkbox"/> Ruzuku <input type="checkbox"/> Snail mail <input type="checkbox"/> Email

Write how you'll deliver your program, product or service below. It can be a combination of the above or anything else you create.

Upserving

As you create your programs, products and services, look for ways you can over-deliver.

From something as simple as a nurturing sequence (autoresponder) message which explains one of the concepts in your ebook to a “thank you for signing up” download page which explains next steps and what will happen, it doesn’t have to take a lot of time or effort.

In fact, some of the best ways to “upserve” are made up of automated “set it and forget it” activities:

- Personalized nurturing sequences which check in not only when someone purchases, but a week or two afterward – without selling
- “Thank you” pages
- Shopping cart checkout pages
- FAQ sections of information (a.k.a. “sales”) pages
- Creating systems and policies such that every client has the same, optimal experience

I highly recommend you pick up a complimentary copy of my report on Extreme Client Care™ at www.ExtremeClientCare.com to see lots of ways you can create ultimate client experiences.

Client Systems

How you care for your clients will make all the difference in your business – from short term revenue to long term profits.

It’s easier than you think to set these up. . . simply think of the best experiences you’ve had as a client and bring those characteristics to your own business.

Let’s start with your New Client Process. And remember, you can start simply now and add to it as your business grows.

“Jane” calls you and says that “YES, she’s ready to work with you, but isn’t sure which program or service she wants.” What happens next?

- Do you have a listing of programs/services that you share? Is it on your website on a page like my Get Started page? Is it on a hidden page where you share the URL when you wish? Is it a pdf document that you email out? Is it a phone conversation? Is the pricing included on the document or available only in a conversation?

Once Jane picks her program or service of choice, what happens? Does she:

- | | |
|--|---|
| • Email you? | • Call you? |
| • Click a link that was on program description to officially register and pay? | • Fill out an online form which includes a link to pay you? |

When is Jane officially enrolled? When she pays? When she signs an agreement?

My recommendation for the next step (letting Jane know what to expect) is to make it easy on you AND your client. The simplest way to do this is to have some type of a QuickStart. It can be an audio, email, video, etc. where you describe what's in the program/covered in the service and next steps.

What will your QuickStart look like? What will it include (and yes...I recommend having one for each program)? Does it make sense to mail them something tangible (a checklist, CD, etc.)?

Do you have an “Intake” form – a document where you have questions she completes to give you accounts/usernames/passwords (for Done 4 You services) or her goals/obstacles/challenges or X or an assessment/questionnaire that she completes?

If you do have an Intake form, what types of questions will you include in it? You don’t need to finish this section today as it often takes time.

Do you have other information such as “How we work together?”, “What you can expect of me?”, Confidentiality language, etc.

Note that this is great information to include on your info (a.k.a. “sales”) pages as well – it helps to build connection and trust and yes...I would include again in your Intake form IF you choose to have one.

What other info will you include in your Intake form?

- How we work together
- Confidentiality terms
- Redesign terms
- Guarantee terms
- What you can expect of me
- What I expect of you
- Payment expectations
- Brief testimonials from other clients

Receiving Money

Which payment methods do you want to accept in your business?

- ☐ Mastercard, VISA
- ☐ Check
- ☐ PayPal
- ☐ Other?
- ☐ American Express
- ☐ Wire Transfer
- ☐ Cash

Is there anything you need to do to make this happen?

Refunding Clients

What's your general policy about refunding clients (note that this may vary by program/product/service)?

- | | |
|---|--|
| <input type="checkbox"/> Do they have to consume info? | <input type="checkbox"/> Is there a time limit? |
| <input type="checkbox"/> Does packaging have to be sealed (as appropriate)? | <input type="checkbox"/> Do you refund via check/credit card? |
| <input type="checkbox"/> If tangible product, who pays for return shipping? | <input type="checkbox"/> Do you have a "no questions asked" refund policy? |

And remember. . .there's no "right" or "wrong" here. It's your business and chances are, you intuitively know what's best.

Client Completion

There comes a time when it makes sense to complete a client relationship:

- | | |
|--|--|
| <ul style="list-style-type: none">• They no longer need your service• They've decided to hire someone else• You're not "clicking"• You no longer want to offer that program | <ul style="list-style-type: none">• You've taken them as far as you can• They've moved service in-house• They're not willing/able to afford your services• Other... |
|--|--|

Important things to remember when it comes to Client Completion:

- It's not anyone's "fault"
- The Universe abhors a vacuum
- You want this to be a pleasant experience for you and your client
- It's "all good"
- They'll remember how you end with them more than the rest of your journey

What will you include in your Client Completion document?

Some thoughts – pick and choose depending on whether we're talking for a program or a service and not every program will need one:

- Confidentiality guarantee
- Positive review statement
- Outstanding tasks, due dates
- Official end date of services
- Wishing them well
- Final billing/invoicing

Behind The Scenes Client Systems

How you care for your clients will make all the difference in your business – from short term revenue to long term profits.

It's easier than you think to set these up. . . simply think of the best experiences you've had as a client and bring those characteristics to your own business.

Credit Card Declines

If you're using www.KickstartCartSolution.com or any other version of 1ShoppingCart, it defaults to trying only 3 times (once a day for 3 days). You can change this to make it 5, 10, etc.

How many days do you want the Cart to try to charge the card?

If the card declines X times, what next?

Then what?

Here's my system if you'd like some inspiration:

1. Let the credit card decline 3 times – they could be behind on emails and not see the “fail” notice, could be an expiration date issue, etc.
2. Team Member sends an email – assumption is that it's an oversight and she asks if she can do anything to assist.
3. If no response, follow-up in 2 business days via telephone.
 - a. If client doesn't answer, voicemail is left and follow-up email sent.
4. If no response in 2 business days, note that client will be taken off program on X date.
5. If no response, client taken off program and follow-up note sent.

If you don't have a shopping cart to do this for you, what is your process? Who will manage it?

Invoicing

There are times, particularly in service businesses where you'll want to invoice for services delivered after the work is completed.

What are your invoice terms?

- Due on receipt
- Do you offer a discount if paid within X days?
- Do you invoice only at month end?
- Due in X days
- Do you stop service if not paid within X days?
- Do you invoice whenever "package" or "plan" hours are exhausted?

Two critical things to keep in mind:

1. Be very comfortable with what you choose. Once you tell it to clients, you have to follow-through or risk losing credibility. If you don't follow-through, it also calls your integrity into question.
2. Remember that, depending on your industry, clients may experience cash flow ups and downs. How can you be supportive while also receiving what's due to your business?

If applicable to your business, write your invoice terms below.

Private Clients

Do you send out client gifts on a regular basis? For example, my private clients receive regular gifts – sometimes it's the same gift for all, sometimes it's personalized based on a specific client's needs.

How can you manage/keep track of your private clients?

- Things you commit to doing for them?
- What you last talked about?
- How to best use your next call/contact with them?
- What gifts you've sent them (and when)?
- Their demographics (birthday, partners, children, pets, anniversary in working with you, etc.)

Group Programs

A quick story about group programs. . . Years ago I was in a small mastermind. It cost \$20,000/year.

After dinner one night at our last in person retreat (we still had just under 2 months left in the program), the host, clipboard in hand, pulled aside one of my colleagues (we had been talking so I was in hearing distance) and said, “I need to know if you’re in or out for next year. If you’re out, I’m moving to the next person on my list.”

Until that point, neither my colleague or I had really thought about whether we’d continue – there were still two months to go.

Want to guess our decision? We gave our response the next morning and our experience significantly decreased over the final months.

One more example. . . I was involved in a different mastermind, also years ago. Upon signup, we received beautiful letters sharing everything we’d receive as part of the mastermind.

Once we were “in”, however, those things fell by the wayside. Not, in my opinion out of a lack of integrity, more I think from a place of overwhelm with everything the host was doing. End result? Only one person continued at the end of the program and the rest of us were left grumbling as the host scrambled to deliver (I had sent a spreadsheet of everything we should have received with the dates of what we did receive).

The solution is simple:

When creating your info/sales page, you list all the great things that your clients will receive when they invest.

How will you ensure you deliver on those promises? (Note...this is the stuff that MANY business owners overlook and is why we walk away with a feeling of “not quite what I expected” at best and “that s_cked” at worst.)

Here's what I do:

Print out the info page, open Excel and list everything promised in one column and the "delivery" date in another column. This way I ensure that everything's covered. I also add any Client Care additions (such as unannounced gifts) so I don't forget about them.

What will you do?

How will you keep costs manageable? You want to deliver on your promises and also ensure a profit. Can you:

- Purchase in bulk (binders, gifts, etc.)?
- Offer a guest expert and "pay" them in exposure by sharing your group with them?
- Creatively pay your team (offer a percentage of gross revenue from the program)?
- Something else?

Whew. . .it's involved to make all this happen. And because of that, I wanted to share a quick exercise on goal setting. After all, this isn't the only thing you're doing. 😊

Creating Achievable Goals

A SMART goal is defined as one that is Specific, Measurable, Achievable, Results-Focused and Time-Bound.

SPECIFIC: Goals should be simply written and clearly define what you are going to do. Specific is the What, Why and How.

Example: By January 1, 2016, implement a new escalator funnel system using the [LeadPages system](#) for the How to Host a Teleseminar/Webcast so People Sign Up, Show Up and Buy in order to create a new passive revenue stream.

Example Explanation:

- “implement a new escalator funnel system” = WHAT
- “using the LeadPages system” = HOW
- “in order to create a new passive revenue stream” = WHY

MEASURABLE: Goals should be measurable so you have tangible evidence that you completed it. There may be several measurements depending on the size of the goal and the milestones involved in achieving.

Example: By January 1, 2016, implement a new escalator funnel system using the [LeadPages system](#) for the How to Host a Teleseminar/Webcast so People Sign Up, Show Up and Buy in order to create a new passive revenue stream.

Example Explanation:

- Key measurement is the timeframe. Is the project completed by January 1, 2016?

ACHIEVABLE: Goals should be achievable yet stretch you so that you feel challenged. If you don't possess the necessary skills and abilities, you either need to obtain them (and build that into the goal) or hire them out.

Example: By January 1, 2016, implement a new escalator funnel system using the LeadPages system for the How to Host a Teleseminar/Webcast so People Sign Up, Show Up and Buy in order to create a new passive revenue stream.

Example Explanation:

- In order to achieve this goal, you must have a LeadPages account and be familiar with it and you must have teleseminar/webcast process content prepared.

RESULTS-FOCUSED: Goals should measure outcomes, not activities.

Example: By January 1, 2016, implement a new escalator funnel system using the LeadPages system for the How to Host a Teleseminar/Webcast so People Sign Up, Show Up and Buy in order to create a new passive revenue stream.

Example Explanation:

- The result is a new escalator funnel system which creates a new passive revenue stream.

TIME-BOUND: Goals should be linked to a timeframe in order to “move them up on your list”. Otherwise they never get attention.

Example: By January 1, 2016, implement a new escalator funnel system using the LeadPages system for the How to Host a Teleseminar/Webcast so People Sign Up, Show Up and Buy in order to create a new passive revenue stream.

Example Explanation:

- January 1, 2016 provides you with the goal's timeframe for completion.

The following worksheet will assist you in creating your own SMART goals.



SMART GOAL WORKSHEET

Write Your Initial Goal:

1. **SPECIFIC** – What will the goal accomplish? How and why will it be accomplished?

2. **MEASURABLE** – How will you measure whether or not the goal has been achieved?

3. **ACHIEVABLE** – Is it possible? What skills, abilities and resources do you need to accomplish your goal?

4. **RESULTS-FOCUSED** – What is the purpose of accomplishing the goal? What is the end result?

5. **TIME-BOUND** – When will the goal be finished? Does the date inspire you to get working on it?

Revised Goal – Write your revised goal below incorporating the SMART components from above.

About the Author

There are lots of things I could share with you.

We could discuss my primary educational background -- a dual Bachelors in International Relations and Russian Language with minors in Natural Resource Economics and Mandarin Chinese and all the courses for an Accounting degree -- but that's not really relevant to what we're doing here.

More relevant would be my work experience:

- 3 years in Peace Corps Marketing Department
- 5 years with the Community for National & Community Service (AmeriCorps, VISTA, ACTION) first in the Marketing Department handling the nationwide launch of AmeriCorps and White House Presidential events and then in the Finance Department managing the Agency's budget as part of a 2-person team.
- 7 years as a Senior Director of Operations for a national satellite television company managing everything from dealer commissions and programs to accounts payable and receivable

Most relevant however would be the last 10 years of running my own successful business. What success means to me and where my business currently is:

- working in/on the business 4 days/week and taking one week per month to focus on my writing projects
- business fully "funds" my life (no additional income aside from what business generates)
- surrounded by a fabulous team (3 part-time virtual assistants with different skill sets) who helps me get things done
- blessed with clients I love working with and who often refer other clients to me
- 34% of current revenue is from passive revenue -- working to increase this to 50%
- working from home with our "children" -- 2 dogs and 3 cats rescued from local shelters -- 2 of which are usually at my feet
- having plenty of time to focus on my hobbies and interests (gardening, natural health, raw foods, marketing. . .the list goes on :-)

- and always walking into the office (a spare bedroom) with a smile grateful for the ability to do what I do with the clients I do it with

and the fact that I partner with you to show you how to create your version of success.

My mission is two-fold:

1. By supporting small business owners who support others, create a ripple effect that lowers the percentage of small businesses which fail from over 63% to under 50% and
2. Help you create a business which not just allows you to live life on your terms, it fully supports it.

If you have any questions or would like to chat, please email me at
Sandy@TheMartiniWay.com

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