

Marketing for Course Creators & Online Educators — Workbook

This workbook turns the course into a build plan for your own course business. Each section pairs with a module: you will define a buyer and lead magnet, plan a live launch, script a webinar and evergreen funnel, and choose a platform with real numbers. Work through the exercises, worksheets, and checklists in order, then use the action plan and editable templates to launch.

Audience Building and Demand Validation

Define a profitable niche and buyer, build a lead magnet and list, and validate demand with a pre-sell before you build.

Exercise: Write Your Result-For-Whom Positioning Statement

Draft and refine the one-sentence positioning that every piece of your marketing will flow from. Make each blank concrete and specific; if any blank is vague, narrow it and try again.

- Fill in: I help [specific person] achieve [specific result] without [common obstacle].

- Run your idea through the three filters: where is the Pain, what is your Proof, and can the buyer Pay? Note a sentence for each.

- Rewrite the statement once more, replacing any generic word (people, better, success) with the exact language your buyer uses.

- List three places (Amazon reviews, a subreddit, competitor YouTube comments) where you found that buyer language.

Worksheet: Buyer Persona One-Pager

Complete every field using your buyer's own words, mined from reviews and forums rather than invented. This persona becomes the source of your headlines and email subject lines.

Persona name and one-line description

Current painful situation (in their words)

Desired transformation / after-state

Top three false beliefs keeping them stuck

Exact phrases they use to describe the problem

Where they already spend money trying to solve it

Budget and buying authority (who approves the spend)

Worksheet: Lead Magnet Design Brief

Design one lead magnet that attracts future buyers, not just downloaders. Keep it narrow, fast to consume, and adjacent to your paid offer.

Lead magnet title (benefit-driven)

Format (checklist / template / swipe file / calculator / cheat sheet)

The one specific problem it solves

The quick win the user gets within minutes

How it connects to the paid course (the next obstacle it reveals)

Landing-page headline draft

Email tool to deliver it (ConvertKit / MailerLite / ActiveCampaign)

Checklist: Validation Pre-Sell Readiness

- Positioning statement passes all three filters (Pain, Proof, Pay)
- Lead magnet is published behind a dedicated opt-in page
- Five-email welcome sequence is written and automated
- One-page pre-sell description written (result, who, what's inside, price)
- Minimum viable number of buyers set (e.g., 10-15) below which you refund
- Enrollment window dated (5-7 days) and announced to list plus network
- Plan to survey non-buyers if you miss the minimum is ready

Running a Live Launch

Plan the seed, pre-launch runway, and open-cart sequence so your cart opens to a warmed, ready-to-buy audience.

Exercise: Map Your Three-Part Pre-Launch Runway

Plan the three free trainings that move your audience from I cannot to ready to buy. Each piece must deliver real value and break one belief.

- Content 1 (Opportunity): what reframe or new possibility will you show, and what quick win will you teach?

- Content 2 (Transformation): which case study or result will you walk through, and what tactic will you give away?

- Content 3 (Ownership): what roadmap will you reveal, and how will you preview the course as the shortcut?

- What single question will you ask at the end of each piece to surface objections in the comments?

Worksheet: Launch Timeline and Cart Window

Lay out the full calendar from seed to cart close. Use real dates so the deadline is genuine and non-negotiable.

Seed / survey date

Pre-launch Content 1 release date

Pre-launch Content 2 release date

Pre-launch Content 3 release date

Cart open date

Cart close date and exact time

Fast-action bonus deadline (if any)

Engagement metric you will watch as the leading indicator

Exercise: Draft Your Five-Day Open-Cart Emails

Outline the daily open-cart emails. Keep urgency honest by closing exactly when you say and removing bonuses that expire.

- Day 1 (Cart Open): subject line and the transformation you restate.
 - Day 2 (Objections): which top objection (time, money, doubt) will you reframe, and with what proof?
 - Day 3 (Social Proof): which testimonials or result screenshots will you feature?
 - Day 5 (Final Day): your morning reminder angle and your final-hours angle.
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Checklist: Launch-Day Operations

- Sales page live and tested on mobile and desktop
- Checkout and payment plan tested with a real transaction
- Email automation suppresses buyers from all sell emails
- Behavioral segment set for sales-page clickers who did not buy
- Final-day email queued for checkout abandoners
- Bonuses and deadline timer match the dates you announced
- Per-email open / click / conversion tracking is on

Webinar and Evergreen Funnels

Script a teaching webinar and stack offer, then automate the same psychology into an evergreen funnel with honest deadlines.

Exercise: Build Your Perfect Webinar Outline

Write the spine of a webinar that teaches genuine value and earns the pitch. Each secret must break one false belief.

- Big promise: the one outcome attendees can achieve and why it is possible now.
 - Secret 1 (the vehicle): the false belief about your method you will break.
 - Secret 2 (themselves): the false belief about their own ability you will break.
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- Secret 3 (external): the false belief about time, money, or circumstances you will break.

Worksheet: Stack Offer Builder

Assemble your offer as an accumulating stack so the total perceived value far exceeds the price. Fill the value of each component; leave the total blank to add up yourself.

Core course name and outcome — stated value

Module list (each named with its result) — stated value

Bonus 1 (removes an obstacle) — stated value

Bonus 2 (accelerates results) — stated value

Fast-action bonus (expires at deadline) — stated value

Total stacked value (leave blank to sum yourself)

Actual price and payment-plan option

Guarantee (refund window or results-based)

Worksheet: Evergreen Funnel Blueprint

Map the automated funnel from registration to the buyer's personal deadline. Note the tool you will use at each stage.

Registration page headline and promise

Number and timing of indoctrination (pre-webinar) emails

Webinar start type (just-in-time / scheduled) and tool

Post-webinar email count and number of days

Per-subscriber deadline length (e.g., 72 hours)

Deadline-automation tool (e.g., Deadline Funnel)

Nurture path for non-buyers back into the list

Checklist: Funnel Conversion Audit

- Teaching portion gives a real quick win before any pitch
- Transition from teaching to offer is scripted and acknowledged openly
- Stack restates running value before the price is shown
- Guarantee clearly reverses the buyer's risk
- Evergreen deadline is genuine per person, not a resetting fake timer
- Registration, show-up, watch-to-pitch, and buyer rates are tracked
- One funnel stage is chosen as this month's optimization target

Platform Selection and Scaling

Choose a platform on cost-per-feature, run paid traffic only after warm-traffic conversion, and scale on a metrics dashboard.

Exercise: Score Your Platform Shortlist

Compare your top platforms on what actually matters for your stage and budget. Run the math at your expected sales volume, not at zero.

- List your three candidate platforms (e.g., Kajabi, Teachable, Thinkific) and each one's monthly price.

- For each, note the platform transaction fee separately from the payment processor fee (~2.9% + 30 cents).

- Which features do you actually need now (email, funnels, community) versus would be nice later?

- At your expected monthly sales, which option is cheapest all-in, and which fits your stage?

Worksheet: Paid Acquisition Math

Define the numbers that decide whether ads are profitable before you spend. Compute the rates yourself; leave derived cells blank.

Course price and average revenue per customer (LTV)

Maximum sustainable Cost Per Lead (CPL)

Maximum sustainable Cost Per Acquisition (CPA)

Starting daily ad budget (e.g., \$20-\$50)

Primary channel to master first (Meta / YouTube / Google)

Target ROAS (revenue / ad spend)

Calculated Earnings Per Lead once data is in (leave blank until measured)

Worksheet: Metrics Dashboard Setup

List the core funnel metrics you will review each launch and where each number comes from. Leave the rate cells blank to calculate per launch.

Opt-in conversion rate (subscribers / visitors) — source

Launch conversion rate (buyers / audience exposed) — source

Refund rate (refunds / sales) — source and your alert threshold

Customer lifetime value (LTV) — source

Cohort completion rate — source

Calculated values for this launch (leave blank to fill in)

Checklist: Scaling Readiness

- Platform chosen and all-in cost validated at expected sales volume
- Funnel proven profitable on warm traffic before any ad spend
- One ad channel selected to master before adding a second
- CPA tracked against customer value, not against clicks
- Completion levers in place (deadlines, community, early quick wins)
- Testimonial collection from finishers is systematized
- Ascension product and referral or affiliate mechanism defined

Your Action Plan

1. Write your result-for-whom positioning statement and validate it against the Pain, Proof, Pay filters.
2. Build a one-page buyer persona from real review and forum language, then design one narrow lead magnet.
3. Publish the lead magnet behind a dedicated opt-in page and automate a five-email welcome sequence.
4. Pre-sell a beta cohort for 5-7 days with a clear minimum; build only if you hit it, survey non-buyers if you miss.
5. Plan a live launch: a seed survey, a three-part pre-launch runway, and a five-day open-cart email sequence with a real deadline.
6. Script a teaching webinar using the big-promise plus three-secrets structure and build a stacked offer with a guarantee.
7. Stand up an evergreen funnel (registration, indoctrination, automated webinar, deadline-driven follow-up) with authentic per-person deadlines.
8. Choose a platform on all-in cost at your expected sales volume, separating platform fees from processor fees.
9. Prove the funnel on warm traffic, then test one ad channel with a small daily budget, scaling only when CPA holds below customer value.
10. Set up a metrics dashboard and after each launch fix the single weakest stage, then add an ascension offer and referral mechanism.

