NAMS

Novice to Advanced Marketing System

HOW FREE PRODUCTS LEAD TO PROFIT

CHECKLIST #5

HOW TO MAKE & MONETIZE DOCUMENTS AND FORMS

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Are you looking for a slightly unusual yet very useful (and profitable!) free digital product that you can give away to your prospects?

Here's an idea: distribute valuable documents and forms.

Let me explain...

Documents and forms are tools that your prospects can put to use immediately. Unlike templates, these documents and forms require very little to no tweaking. That's because in most cases the documents and forms are "universal," which means they are ready to go for everyone in your niche.

Let me share with you a few examples of documents and forms:

- A client-intake form for life coaches.
- A welcome packet for personal trainers to give to their clients.
- A quiz to help dog lovers select the right breed for them.
- An invoicing form.
- Purchase orders.
- Meal plans, recipes and shopping lists.
- An affiliate agreement for vendors to use.

TIP: *As always, don't create legal forms yourself UNLESS you are an attorney. If you don't hold a law degree, then find an attorney to create these forms and documents for you.*

Documents and forms make great free digital product, because your prospects can literally put them to use within minutes of downloading them. For example, if you give a personal trainer a set of meal plans, recipes and shopping lists, this personal trainer can turn around and give these documents to their clients that same day. As such, recipients of documents and forms place a really high value on them.

What's beneficial to you is that providing documents and forms gives you an opportunity to sell related offers on the backend. For example, if you giveaway recipes and meal plans to personal trainers, then you can also sell them additional items to make it easier for them to run their business, such as exercise programming and workouts.

Which brings us to the question of how do you make and monetize documents and forms? That's what you're about to discover, so read on...

The type of documents and forms you create will depend on what you're selling. In essence, the documents and forms should be something that prospects can use in conjunction with your paid offer.

In many cases, your paid offer might be some sort of comprehensive information product, such as an ebook, membership site, or online course. For example, if you're selling a business start-up kit to aspiring online business owners, then you might giveaway legal forms for a website, such as a privacy policy and terms of service.

However, in-depth information products aren't the only things you can sell on the backend of your documents and forms. You might also sell tools, services or coaching.

For example, perhaps you're offering meal plans and recipes for personal trainers to give to their clients. You might then offer personal coaching to these trainers, to help them overcome obstacle to growing their business.

So, the point is, decide what it is that you're selling. Once you do that, then move onto the steps of actually creating your documents and forms...

Step 1: Decide What to Create

Now that you know what you're selling, your next step is to figure out what sort of document or form would be a great match to the paid product. This is a matter of brainstorming.

For example:

- You're selling a guide to hiring employees. You can offer free application forms to business owners.
- You're selling a guide to writing and marketing a novel. You can offer a query document for writers to use when they approach publishers.
- You're selling information about creating information products. You might offer free product disclaimers and copyright notices for marketers to insert inside their products.
- You're selling information to mental-health counselors. You might offer a client-intake questionnaire for counselors to give to their new clients.
- You're selling information to web designers. You might offer a quote form for their clients to fill out.
- You're selling outsourcing information. You might offer project descriptions or even freelancer agreements to your prospects.

Those are just a few examples. You'll need to look at the product you're selling as well as your prospect's needs in order to determine what sort of documents and forms you should create. Ask yourself:

- What sort of forms and documents would make your prospect's life easier?
- What sort of forms and documents can you create that your prospects can put to use almost immediately?
- What sort of forms and documents do your prospects really want and need in order to achieve a goal or complete a task?

Once you've done some brainstorming, then select the form or documents that you think will be in the highest demand (research this if you need to), and then move onto the next step...

Step 2: Research the Forms or Documents

Now you need to determine what all to include in your forms or documents.

If you're an expert in this field, then you may already know exactly what to include. In that case, start by creating a rough draft of the form or document.

The second step is to make sure you make this form or document as valuable as possible. And that means researching similar forms and documents to see what OTHER people have included in these items. This research will likely give you ideas of points to include that you may not have thought of on your own.

For example, if you're creating a welcome packet for personal trainers to use with their new clients, then you'll want to get your eyes on as many other welcome packets as possible to get new ideas. Perhaps you notice other welcome packets include weekly weigh-in documents, which you didn't include in your draft. That's an idea to add to your packet.

> ***NOTE:*** *Keep in mind that you are in NO way copying these other documents and forms that you're researching. Instead, you are using them for inspiration and to get ideas for what points to include in your own document. Your finished product will be completely your own, completely unique.*

Another way to get ideas for what to include in your forms or documents is to consult with people who actually use these sorts of documents on a regular basis. For example, if you're creating a jobapplication form for business owners to use when they're hiring, then you'll want to get feedback from human resource managers and business owners about what all to include in your form.

Once you've completed your research and have decided what all to include in your document, then move onto the next step...

Step 3: Create Your Documents and Forms

Now that you've done the research and perhaps sketched out an outline or rough draft, it's time to create the finished product.

> **NOTE**: If this is a legal document or anything else that requires a professional to create it, then hire a professional to make it for you.

Here's one of the keys to creating this free digital product: it needs to be something that your prospects can put to use immediately, with very little or no tweaking needed.

> ***TIP:*** *If you're creating a document where users need to input a lot of information and tweak it to suit their needs, then you should be creating a template instead of a document or form. Check the Free digital product Funds lesson on templates to learn more about making and monetizing this type of free digital product.*

For example, a welcome sheet or welcome packet that you offer to personal trainers to give to their clients should be very generic. Your prospects may opt to print out the form on their personal letterhead in order to personalize it, but they shouldn't need to spend time tweaking it or filling in the blanks.

As such, you'll want to go line-by-line through your document to ensure that anything you include is generic enough to be applicable to most if not all of your users.

For example, if you're creating a welcome packet for personal trainers to give to their fitness boot camp clients, then don't refer to any specific types of exercise. That's because you simply don't know what sort of boot camp any particular personal trainer is going to run. Some may do circuits, some may use kettlebells, some may do high intensity training, and so on. But for every trainer who utilizes one of these methods or pieces of equipment, you'll find a trainer who doesn't use them (which renders your document useless).

Point is, once you complete your document or form, then ask yourself these questions:

- Is there anything in this document that my users absolutely NEED to tweak?

  If the answer is "yes" and you also notice there are several things to tweak, then create a template instead.

  If the answer is "yes" and there is very little that needs to be inputted or tweaked (we're talking one or two items tops), then be sure you offer the form in an editable format. Alternatively, see if you can reword the content to be more generic.

  If the answer is "no," then you've created a good, generic form. Congrats!

- Will this document or form be useful to a majority of your audience? If the answer is "no," then once again you need to see if you can make the document more generic.

  For example, if you're offering meal plans and nutrition tips for personal trainers and you choose a specific type of diet (such as the Paleo diet), then you may find that not all trainers are going to be interested in this. That's okay IF you're selling Paleo-specific products on the backend – in that case, you've got a targeted market. If you're not doing that, then focus on creating meal plans with more generic information, such as reducing caloric intake and eating clean.

One more tip...

Do you want to save yourself some time in creating your form? Then see if anyone in your niche is selling the private label rights to the documents and forms you need. If you're giving away documents that your prospects are going to give away or sell to others, then be sure you purchase the master private label rights.

And finally, if your users will have cause to edit the document, then be sure it's an editable format (such as .txt). If users are likely to print it, then ensure its formatted nicely and prints out well (double check this on your own printer to be sure).

Step 4: Provide Instructions

It's a good idea to include an instruction sheet along with your form. This sheet should include the following components:

- A thank you for downloading the document. You'll also want to reiterate the benefits of using the document, and then encourage your prospects to use it right away. If they use it and derive benefit from it, then they'll be more open to purchasing your backend offer. (More on that in a bit.)
- Who is best served using the document. If your document is aimed at a certain segment of the population, then be very clear about who should be using it.

  Let's go back to the example of creating documents for personal trainers. If your documents are only for those who do fitness boot camps, then make this clear in your instructions. That way, those who do one-on-one training won't inadvertently use documents that aren't geared for that specific use.

- How to use the document. Here you provide instructions as to how to use the document. If the document requires any tweaking, then explicitly explain where and how the document needs to be tweaked. If a user can print it out on letter head or in another format, explain this. If the user can upload the document to a website, explain this as well.

  In short, provide clear instructions so that even someone who isn't familiar with the form is able to put it to use immediately.

- A promo for your paid product. Finally, your instructions (and possible the form itself) should include a link and call to action. You'll learn more about monetizing your documents in the next section.

As mentioned earlier, **you can monetize your documents and forms by embedding a related offer** (often an in-depth information product) within the free digital product.

There are two ways to do this:

- Embed an offer directly in the document or form itself.
- Embed an offer inside of the instructions.

Depending on what sort of form you're offering, I suggest you embed your promo in both locations.

Take note: sometimes the people who use your forms (your prospects) are going to be part of a different audience than your prospect's end users. As such, your promos need to reflect that.

Let's go back to the example where you offer personal trainers documents (such as welcome packets) that they can give to their clients.

In this case, you have two completely different audiences:

1. Personal trainers.
2. People who want to lose weight.

Thus, you can embed two different offers.

In the instructions, you'll embed an offer that's of interest to personal trainers, such as a marketing package that helps them grow their business.

In the welcome packet you can embed an offer that's of interest to people who want to lose weight, such as an in-depth dieting guide.

Take note -

If your document is editable, then generally your prospects WILL edit it before they distribute it to their prospects and customers.

What you can do to help ensure your links stay intact is to offer rebrandable links. This means you let your prospects change a promo link to their affiliate link. That way, if the end user buys something, both you and your user make money. (Provided the link is for your product or for an offer on a two-tier affiliate program.)

And therein lies one of the big benefits of offering documents and forms.

You get two chances to make money from two different audiences.

Indeed, you're likely to find that the offer embedded in the document gets you the most sales simply because it gets you the most exposure.

Consider this...

Let's suppose you have a document that you give away to 2000 people. That means that 2000 people are going to see the offer that you've embedded in your instructions. However, the offer you've embedded within the document itself is going to see by many more multiples of people. And that's because a good chunk of your 2000 prospects are going to be using the form, which puts your offer in front of even more people.

Of course, not every single one of your 2000 prospects are going to use and distribute the form. But let's say even just 25% (500 people) put it to use. And on average, each of these 500 people are able to generate 100 views of your form. That means that you'll have 50,000 people seeing the form's offer.

Now you can see why it's well worth the effort to create and embed a targeted offer inside the document!

> ***NOTE:*** *Depending on what sort of form you've created, it may be the case that very few people actually see the form.*

For example, if you create a freelancer agreement, then relatively few additional people will see it. That's because your average small business owner will only hire two or three freelancers. So if you have 500 business owners using the form, and then each hire about two freelancers, then a total of 1000 freelancers will see it.

That's not an inconsequential number, but this sort of form also won't garner massive exposure in front of tens of thousands of people.

Point is, if your main goal is to sell something to the end users, then be sure you select a type of document or form that's likely to get a wide distribution and lots of exposure.

As mentioned, the other place you can embed an offer is in the instructions. Whenever possible, you can let users know they can make the most of the document by purchasing the product you have on offer. Or, at the very least, your form will solve one part of your prospect's problem, and your related product will solve another part of their problem.

For example, let's suppose you're giving away client-intake forms for life coaches. You can then offer a product that helps life coaches before BETTER at what they do, grow their business, and enjoy more success. This starts by teaching them what to do with their client intake questionnaire, and the best way to help someone according to how they answered the questions.

Another example: let's suppose you've created an affiliate agreement for vendors to give to their affiliates to sign. You might pitch a product in the instructions that promises to help vendors grow their affiliate teams, motivate these affiliates, and start making a whole lot more money with their affiliate programs.

One more example: let's suppose you're offering a small set of meal plans and recipes for personal trainers to give to their clients. You can then offer these personal trainers a way to make money, by selling them the private label rights (PLR) to a nutrition guide. Thus, these personal trainers can sell a nutrition guide to their clients, which effortlessly gives them another stream of income in their fitness business.

Conclusion

Now that you know how to make and monetize documents and forms, your next step is easy - start creating them! You can start by taking a look at your paid offers to see which ones the best fit for this type are of free digital product. Then you can offer one document or even a small package of documents as a free digital product to those who give you their email address. A valuable free digital product like this works well to turn browsers into buyers, so give it a try today to find out if that's true of your audience too!

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