

The Live Webinar Software & Integration Guide

Here's What You're Going To Learn

In this guide, you're going to learn the first step in setting up your Live webinar. That means setting up your webinar registration related pages and actually scheduling your Live webinars.

You've probably registered for webinars before, including Amy's. And that process probably seemed very simple. You went to a page, entered your name and email and began receiving emails about the webinar, including the link to attend the webinar.

But there's actually a lot of activity going on behind the scenes to make all of that "simplicity" happen. And we'll be covering that process in this guide.

Yes, There's Going To Be Some Tech Ahead

The truth is that setting up your Live webinar and connecting all of the moving pieces behind the scenes can get a little technical. And if you're not comfortable with tech, it can also seem overwhelming.

So here's what I want you to remember. Just relax. We've got you covered. We're going to walk you through everything step by step. And what you'll see is that this process is actually more repetitive than technical.

There's Always More Than One Solution

The webinar integration method we'll be walking you through in this guide is designed to work for everyone, in any situation.

That means it will work for you.

But guess what? You might find that a variation of this method or maybe a completely different method works better for your particular needs.

And if that's the case, great, go with it. There is absolutely nothing wrong with that. However, just to be clear, we won't be covering all of the possible variations to Live webinar integrations in this guide. Just a single method that will work for everyone.

Okay, let's get started.

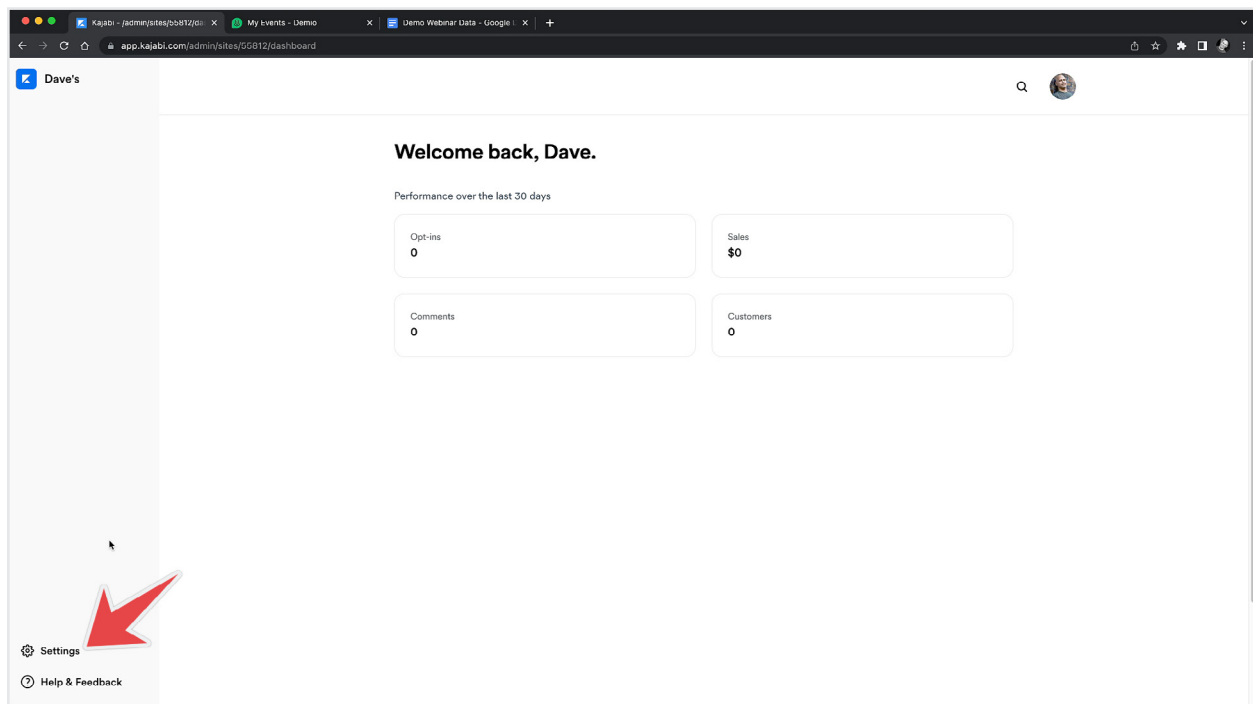
STEP 1

Creating Your Webinar Registration Pages In Kajabi and Scheduling Your Webinars In Demio

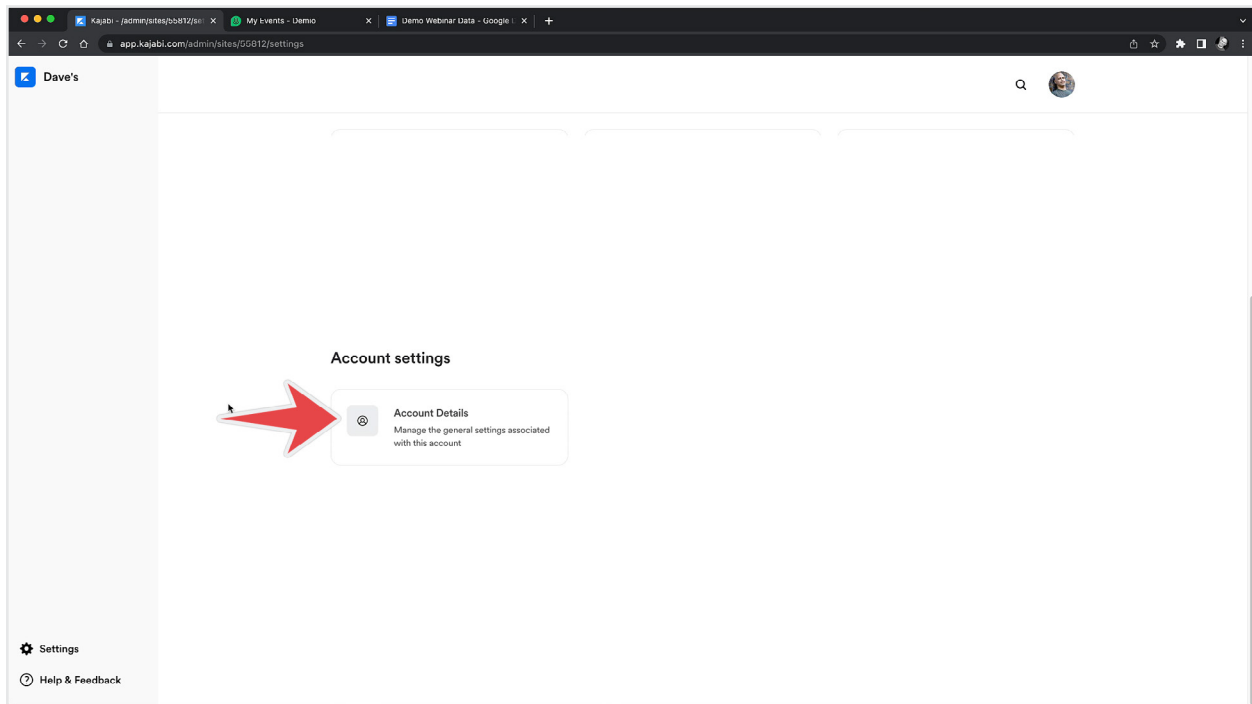
What we'll be doing in Step 1 is creating a webinar registration page in Kajabi and then when someone clicks on the button on the webinar registration page, a popup will appear where they can select the date of the webinar that they would like to attend and register.

All of the actual webinars will be set up in Demio. And then once someone completes the registration, they will be taken to a thank you page in Kajabi. Now this sounds fairly simple, however, there are a lot of moving parts behind the scenes. And we'll be jumping around between different platforms while we do this. Just relax and follow along, as everything will be laid out for you step by step.

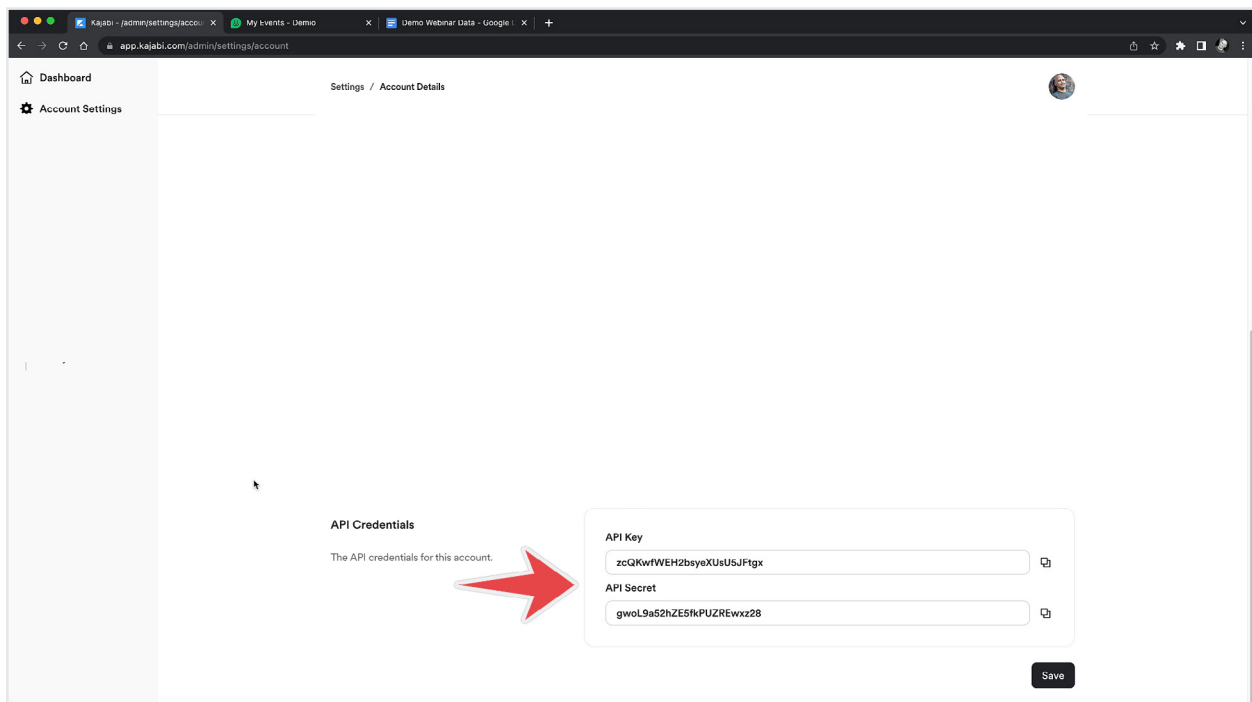
We're going to start in Kajabi. And the first thing you need to do is go down to the lower left of the screen and click on the **Settings** icon:



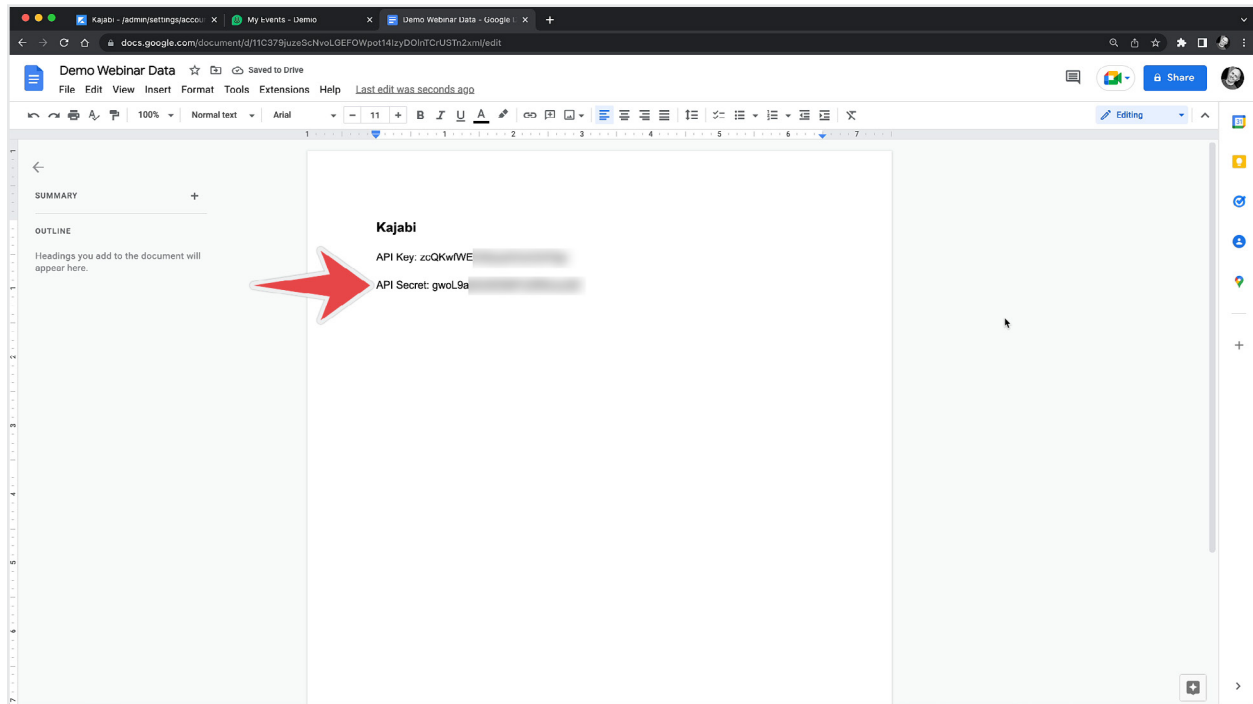
Then scroll down to **Account Settings** and click on **Account Details**:



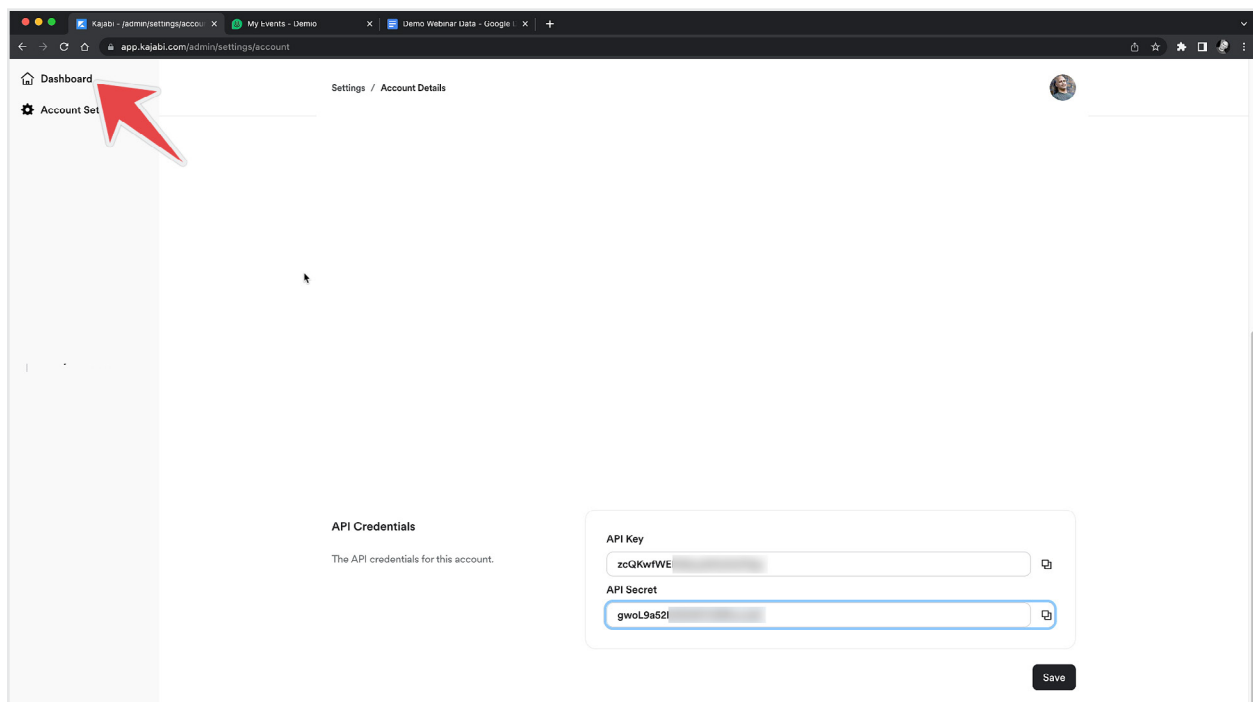
Scroll to the bottom of the page that appears and next to the section that says **API Credentials**, and you'll see an **API key** and an **API secret**:



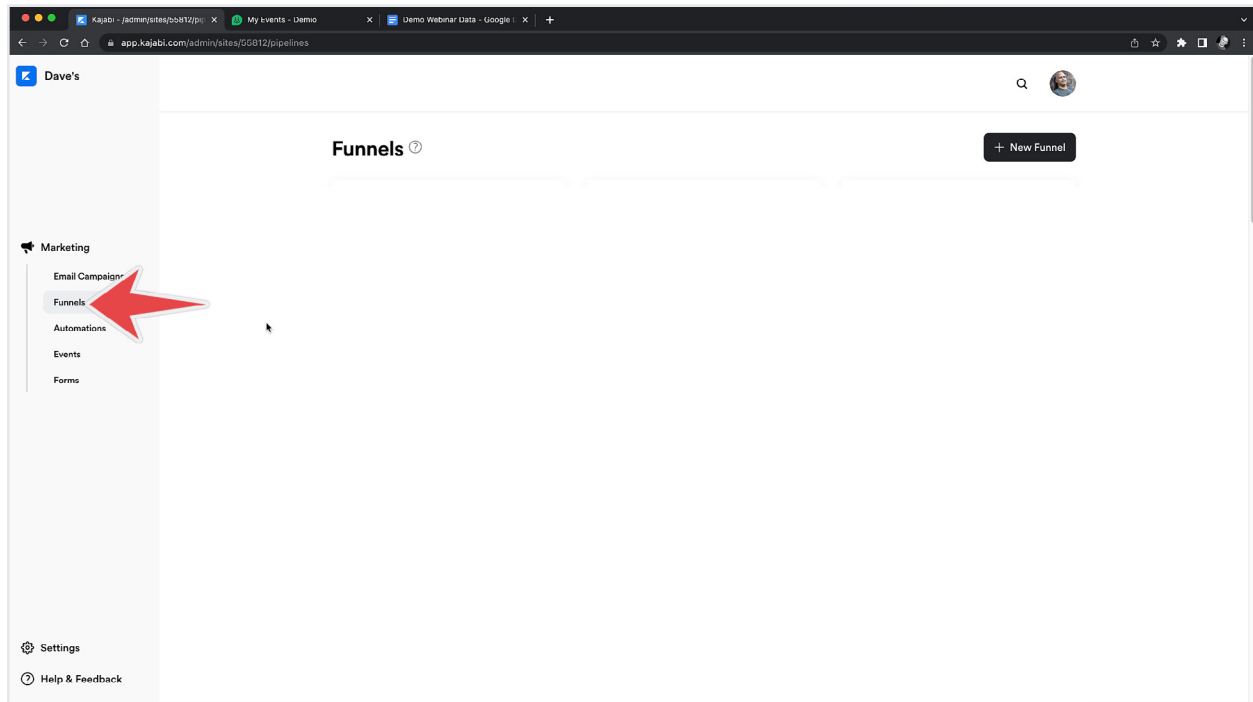
What you'll do next is create a **Google Doc**, then copy and paste both the **Api key** and the **API secret** into that Google Doc. We are doing this because we'll need these keys later:



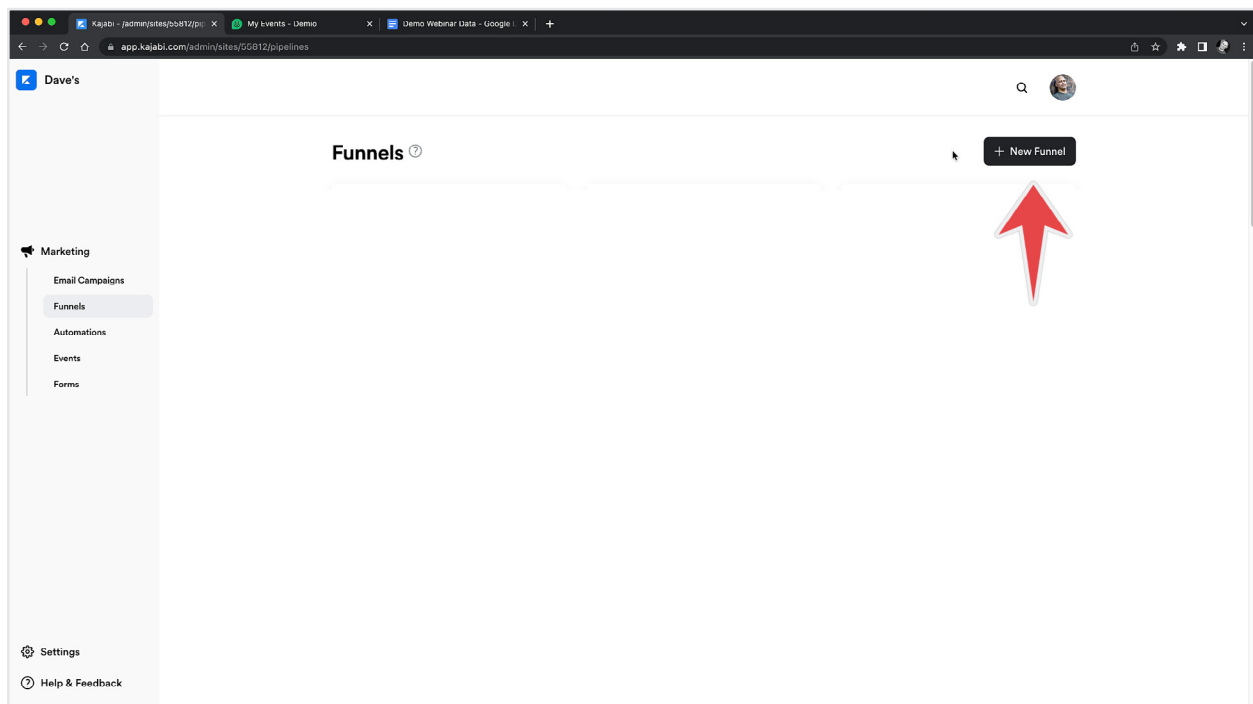
After you've done this, in Kajabi, I want you to go to the upper left hand corner and click on **Dashboard**:



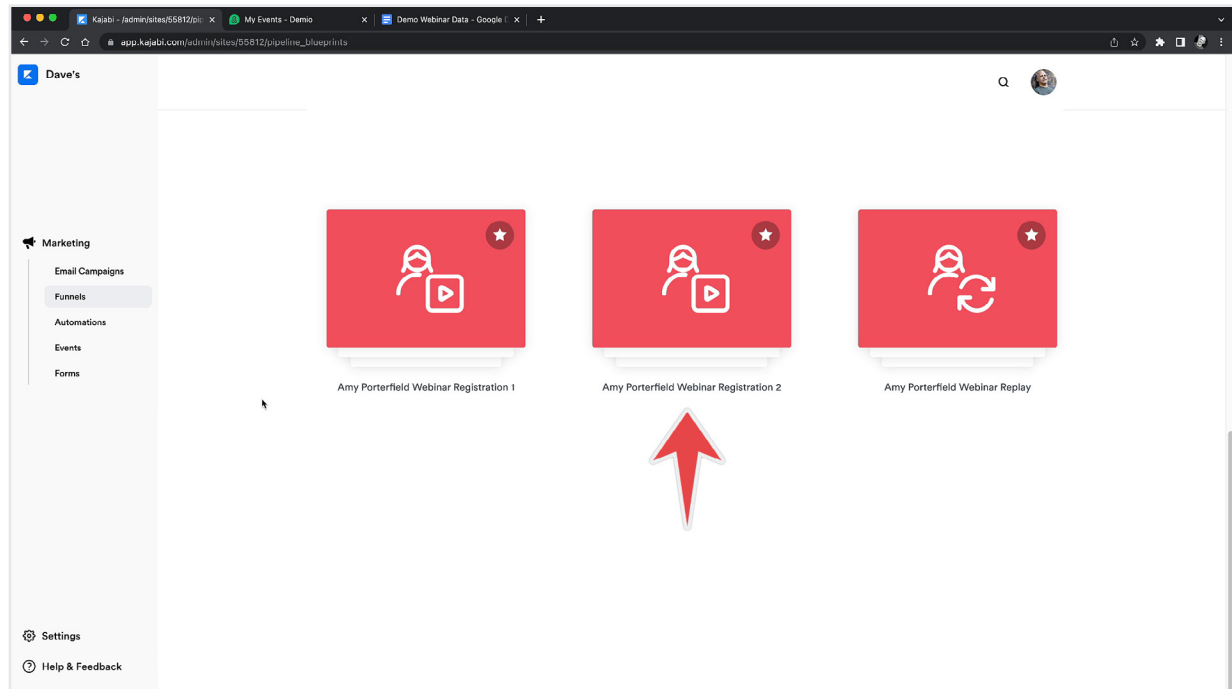
Now we're going to create our webinar registration page and thank you or confirmation page. To do this, on the side panel on the left, select **Marketing** and then **Funnels**:



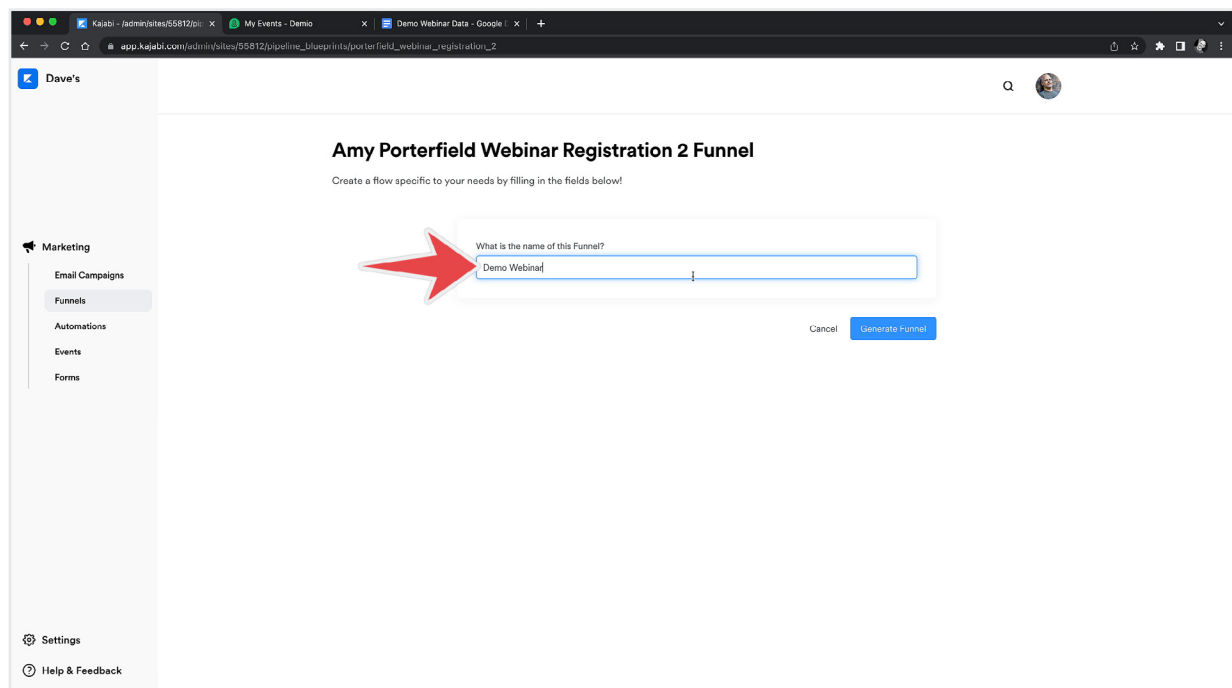
Then go to the upper right hand corner and click on **New Funnel**:

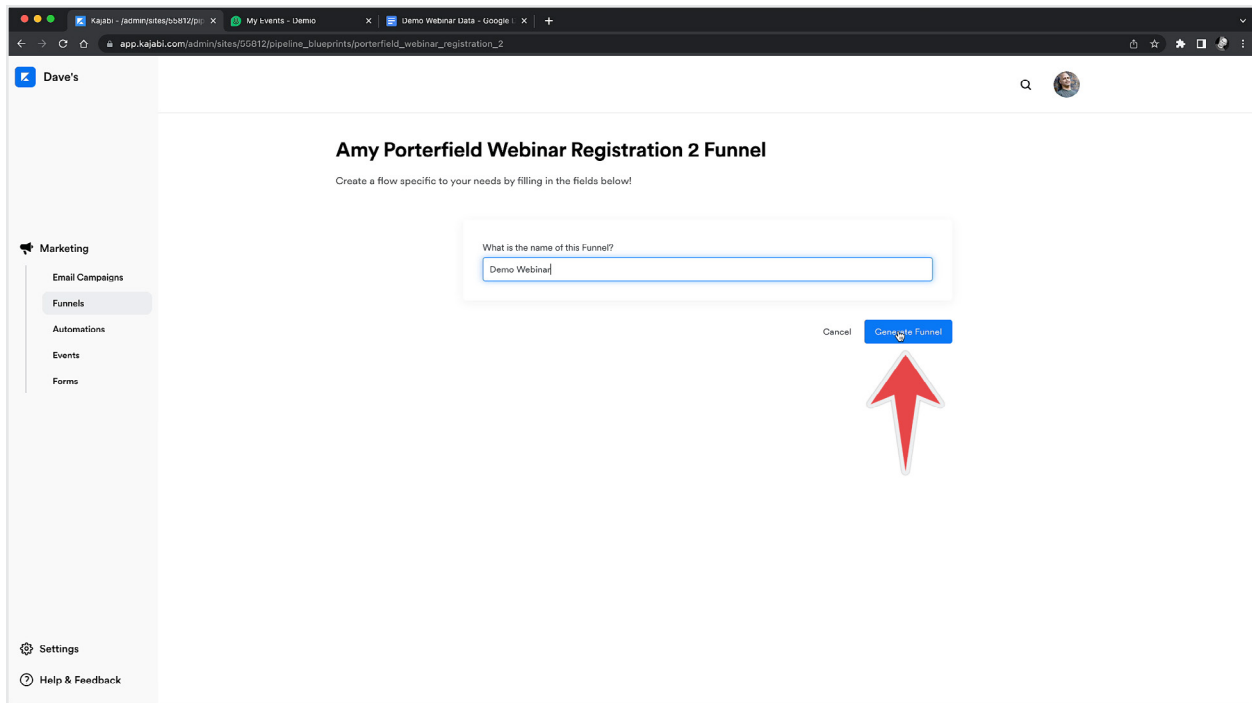


A variety of templates will appear. Navigate to the section that lists Amy's custom templates, select one of her webinar registration templates and click on it. In this example, I'm going to select her webinar registration 2 template:

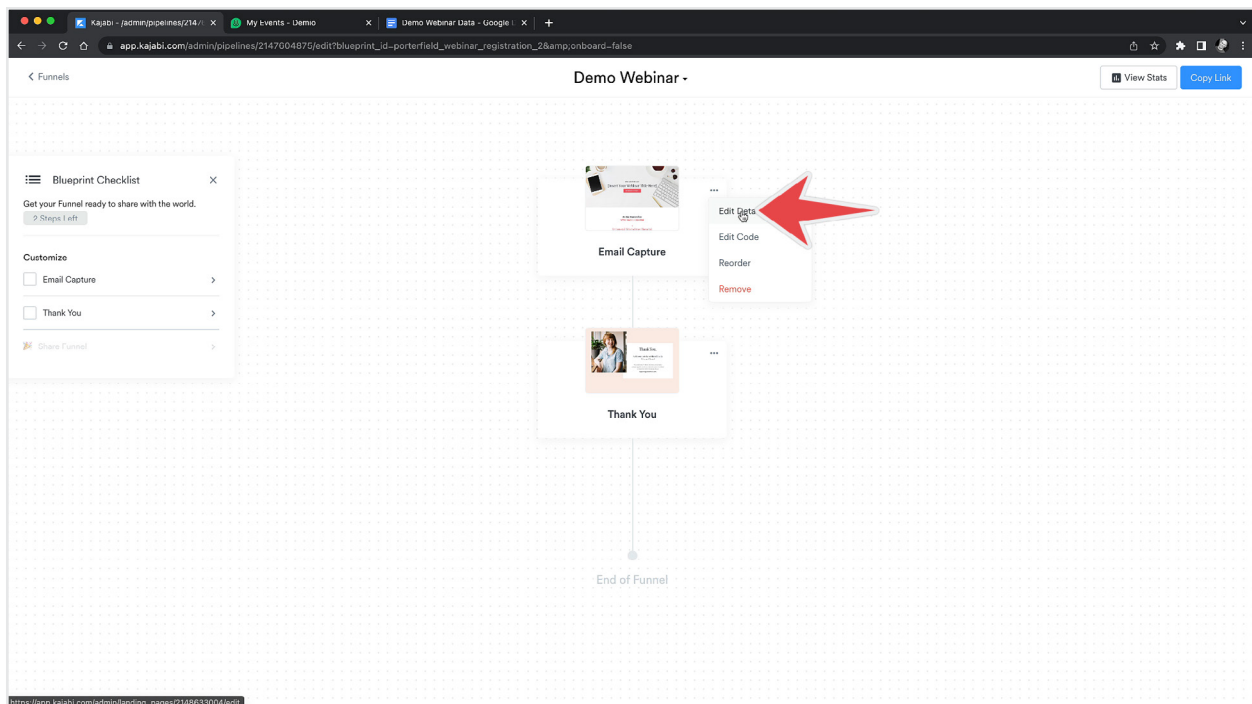


Give your funnel a name that makes sense to you and click the **Generate Funnel** button. Kajabi will then go through the process of building your webinar registration and thank you pages:

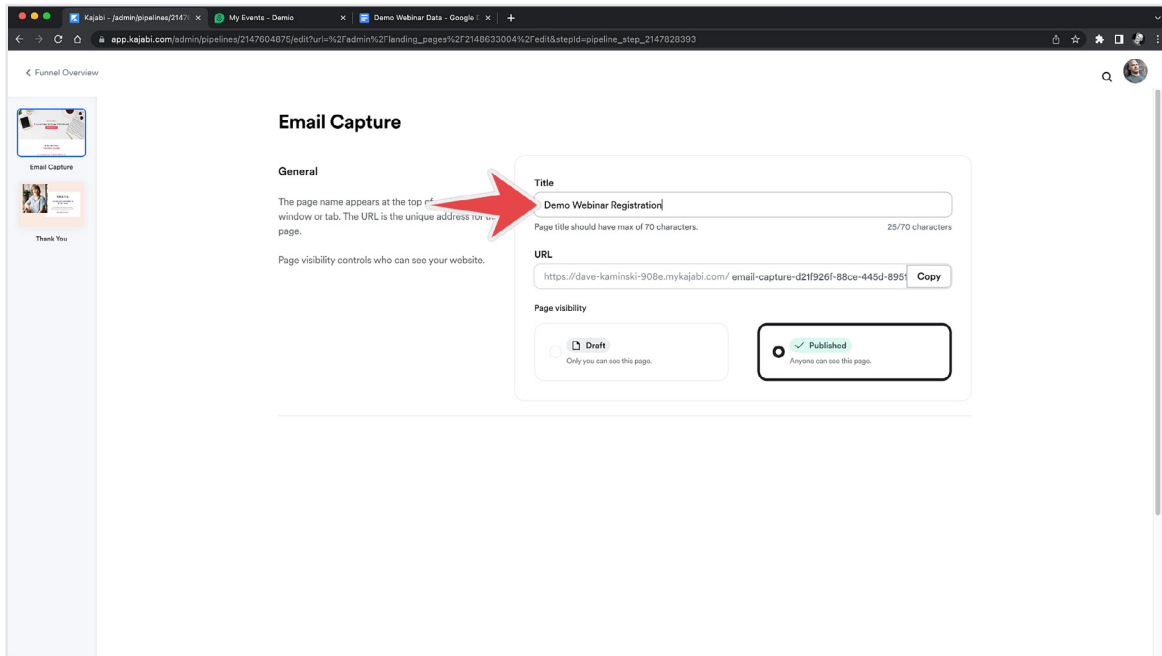




Once the pages are created, go to the webinar registration page at the top, click on the **three dots** and select **Edit Details**:

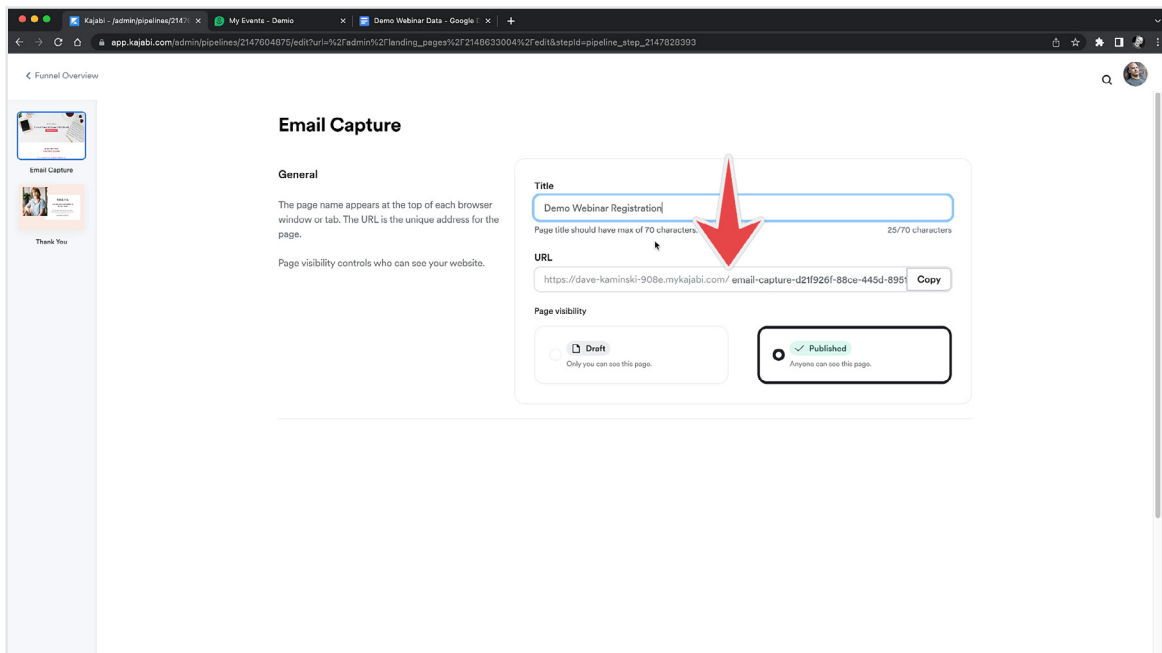


Give your page a title that makes sense to you. For example, I've named mine Demo Webinar Registration:



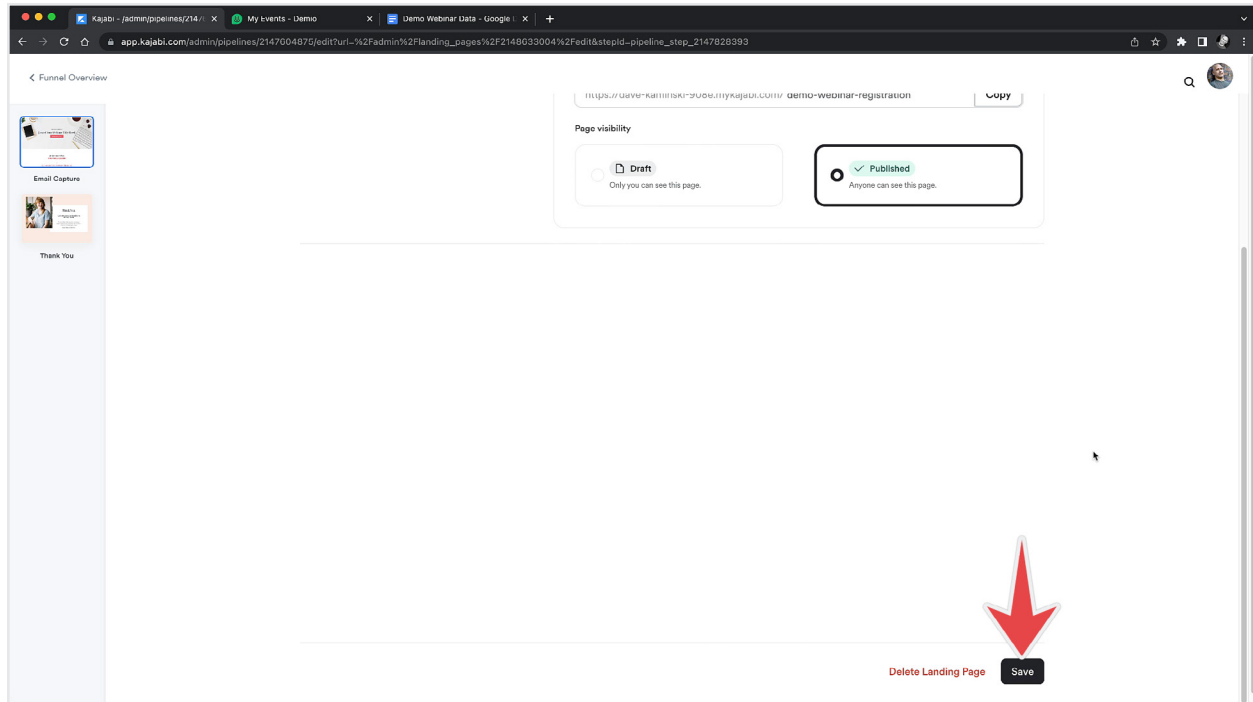
Below that you'll see the URL to the page. Part of this URL is automatically generated by Kajabi, but we can change the end of the URL to something that makes more sense.

For instance, I've changed mine to demo webinar registration. You can change yours to something that makes sense to you:

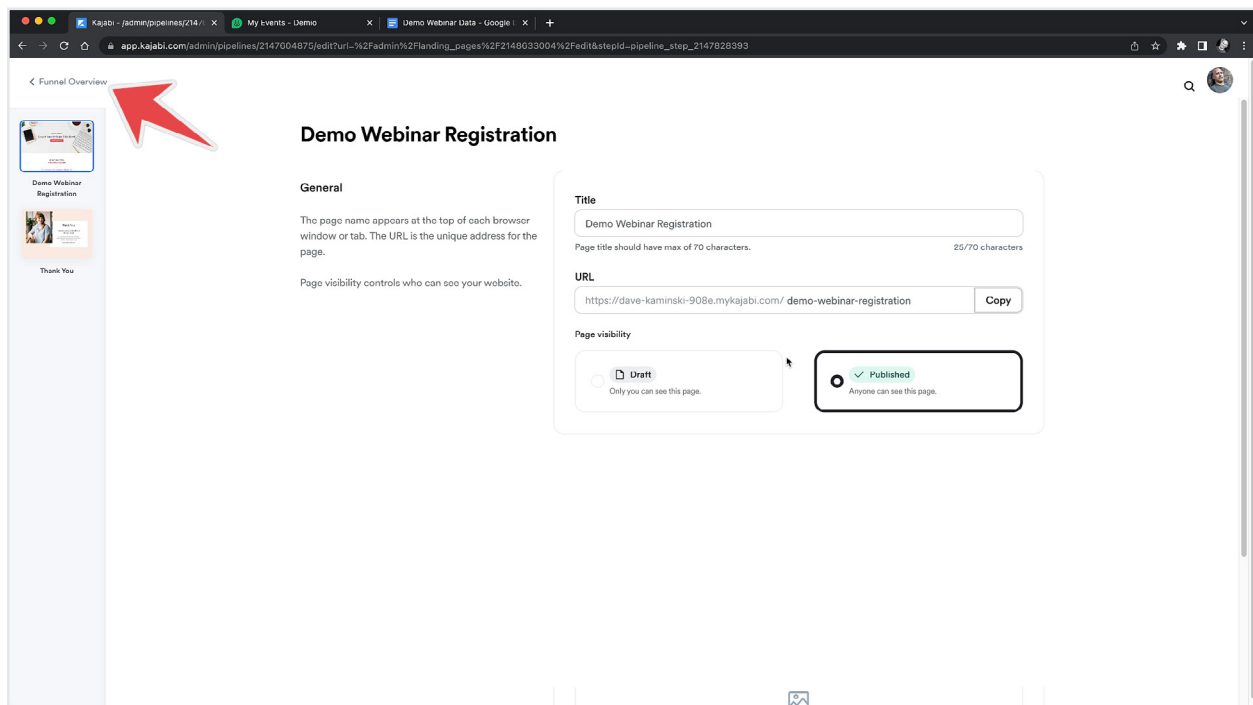


If you do change your URL, just be aware that you cannot use any spaces or special characters in the name.

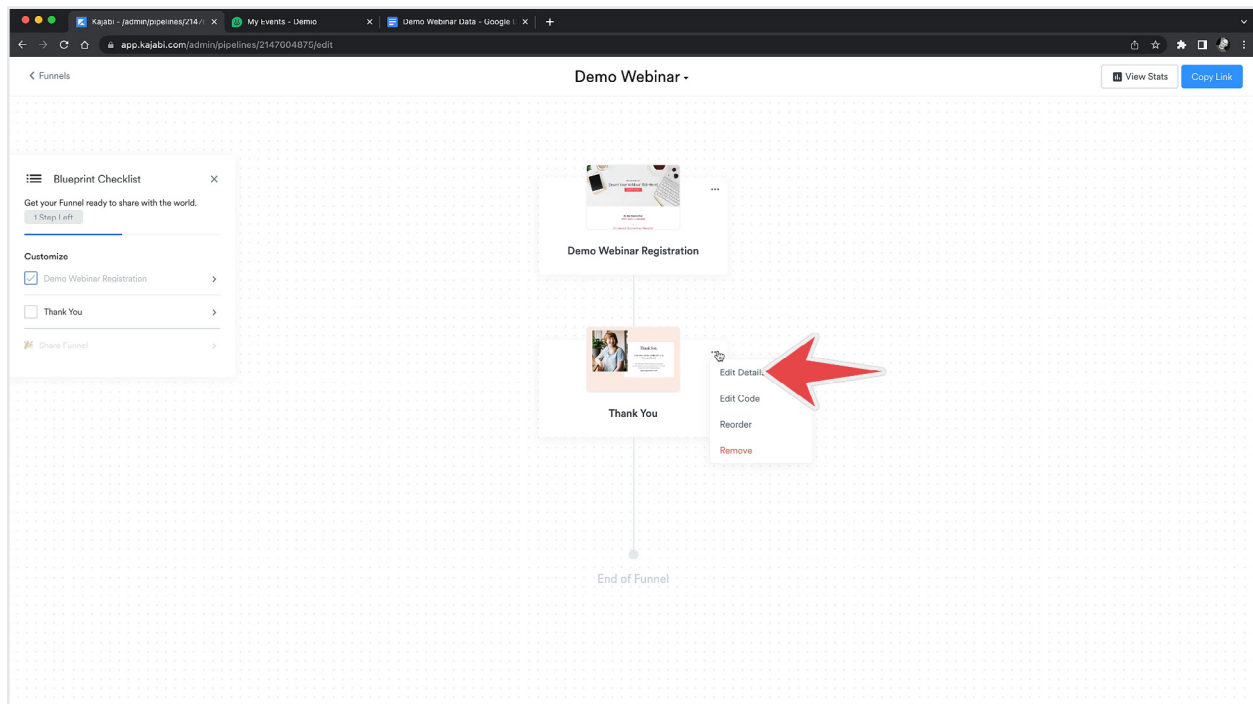
Then scroll down to the bottom of the screen and click on **Save**:



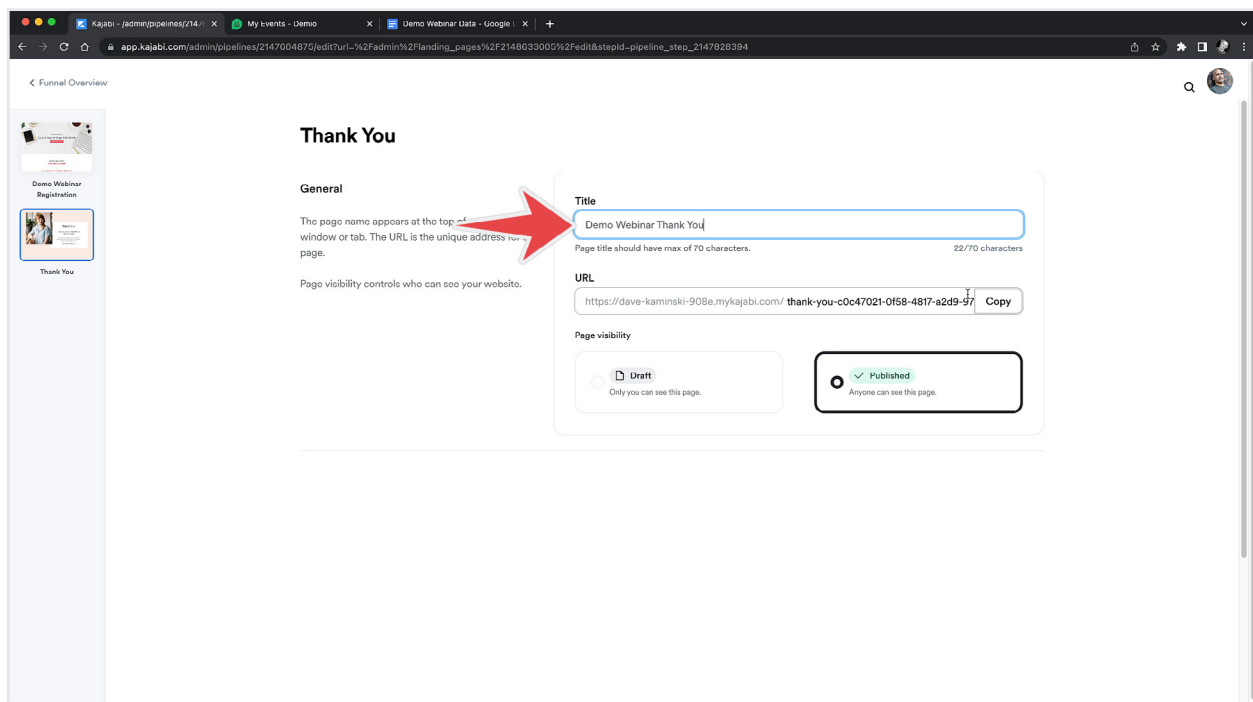
Then go to the upper left hand corner and click on **Funnel Overview**:



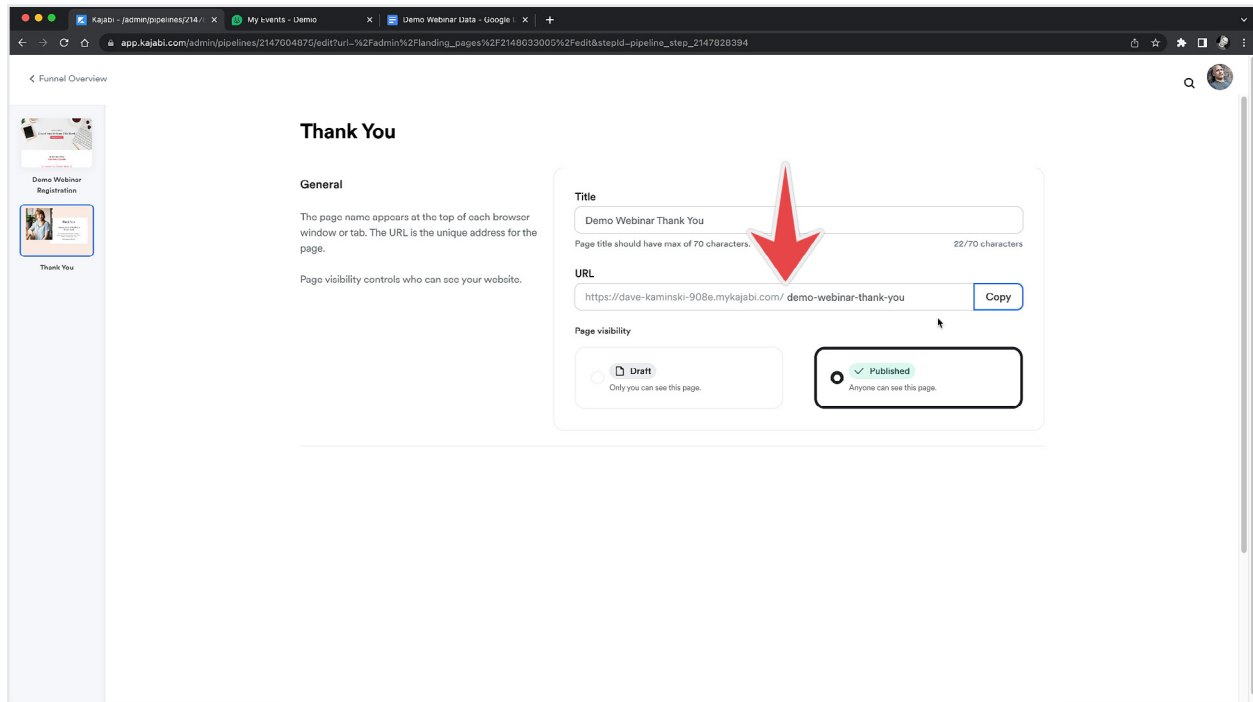
Now we're going to repeat the same process, but for the thank you or confirmation page. Go down to the **three dots** next to that page, click and select **Edit Details**:



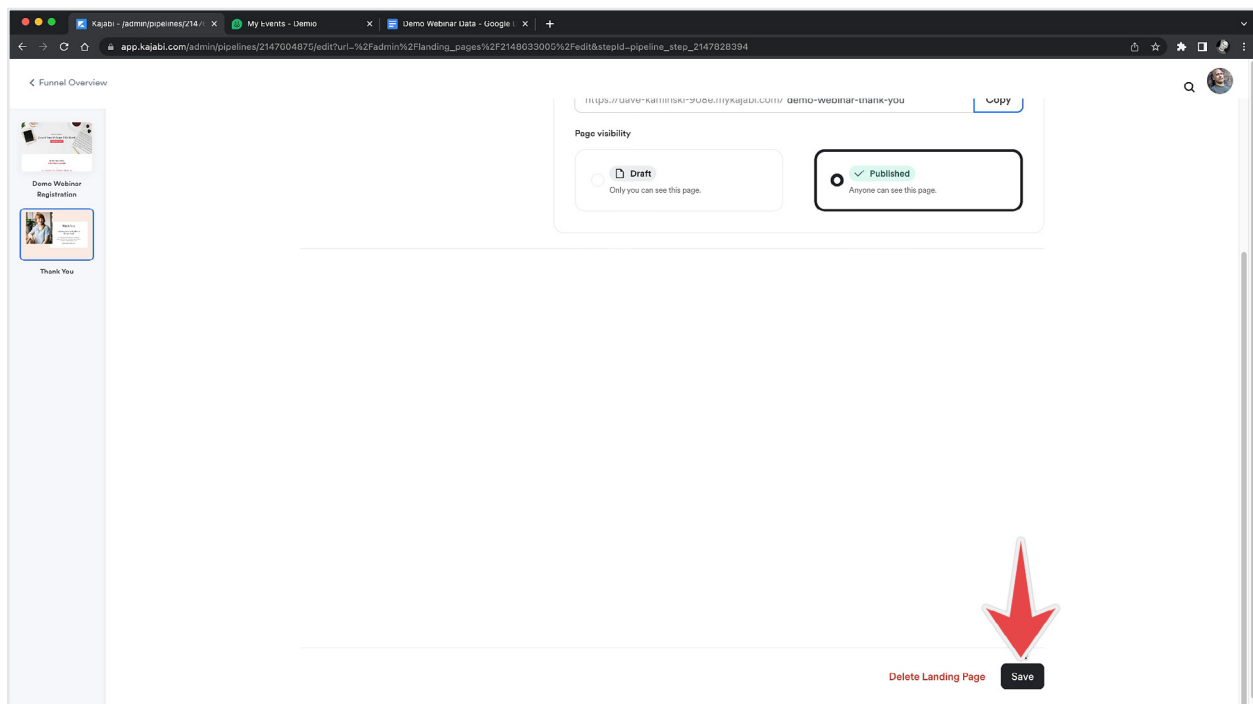
For the title, can change it to something that makes sense for you. For instance, I've named mine Demo Webinar Thank You:



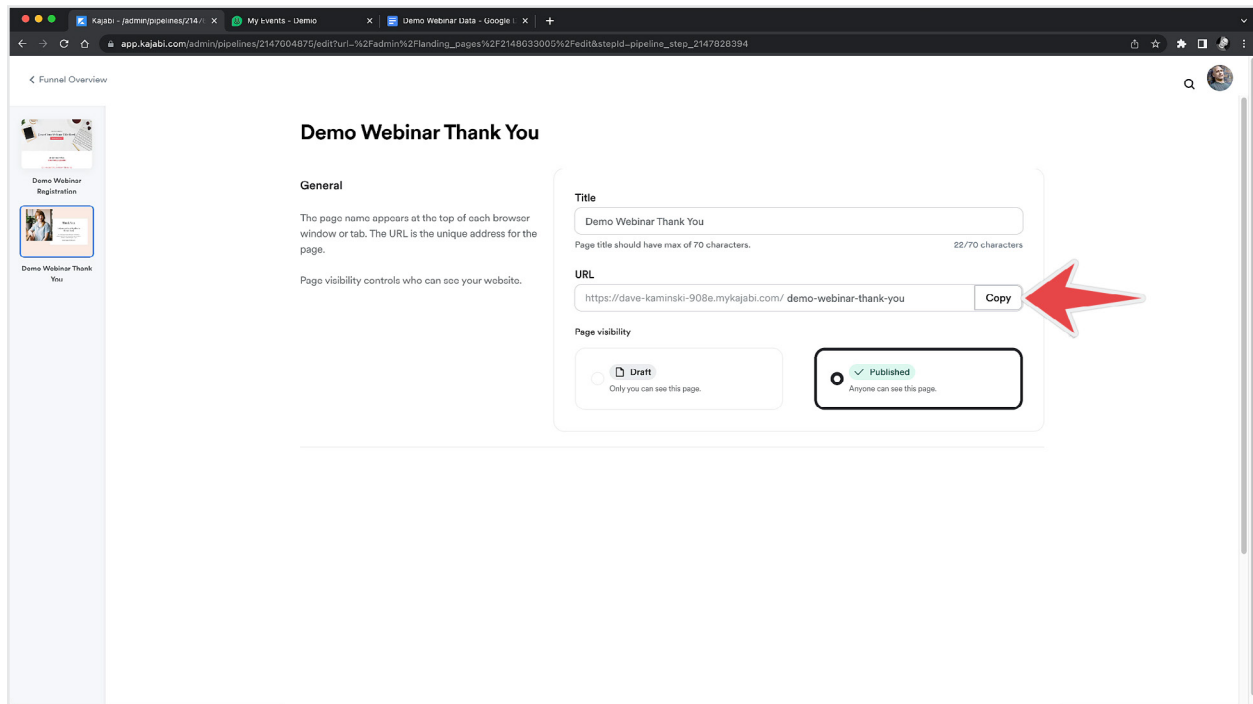
Next, change the last part of the URL to something that makes sense to you and is more readable. For example, I've named mine demo webinar thank you. Again, no spaces or special characters can be used here:



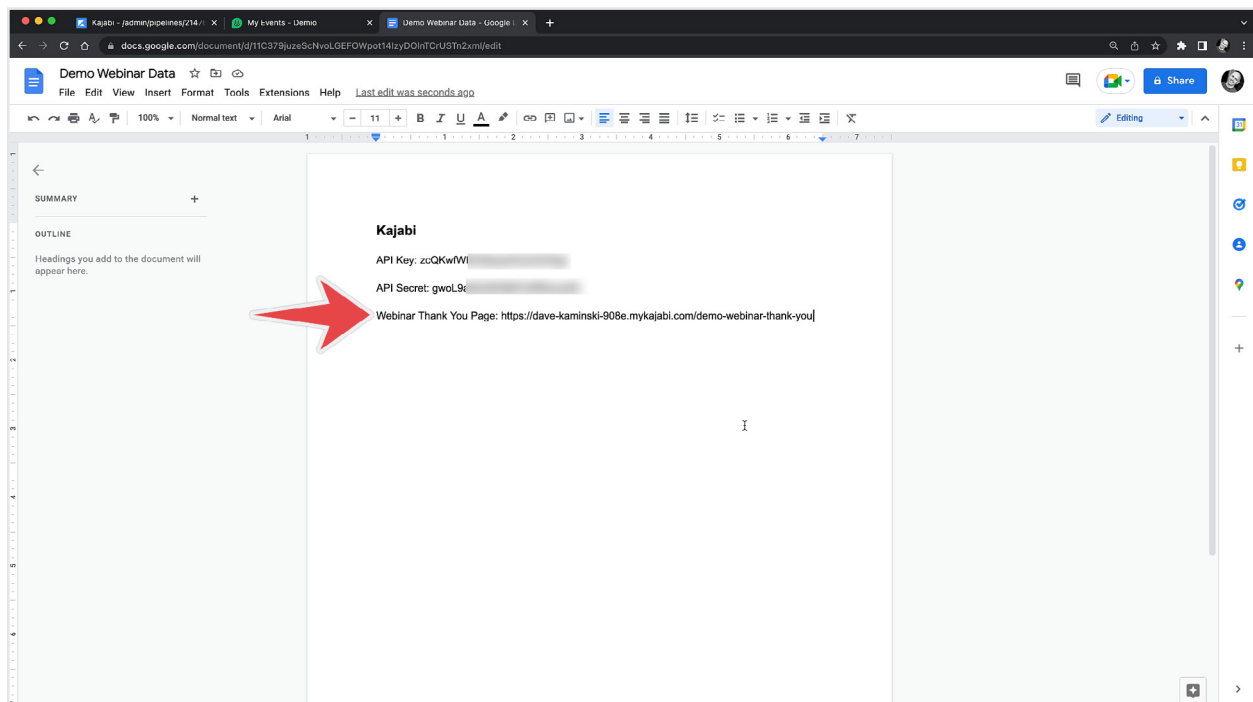
Then go down to the bottom of the page and click on the **Save** button:



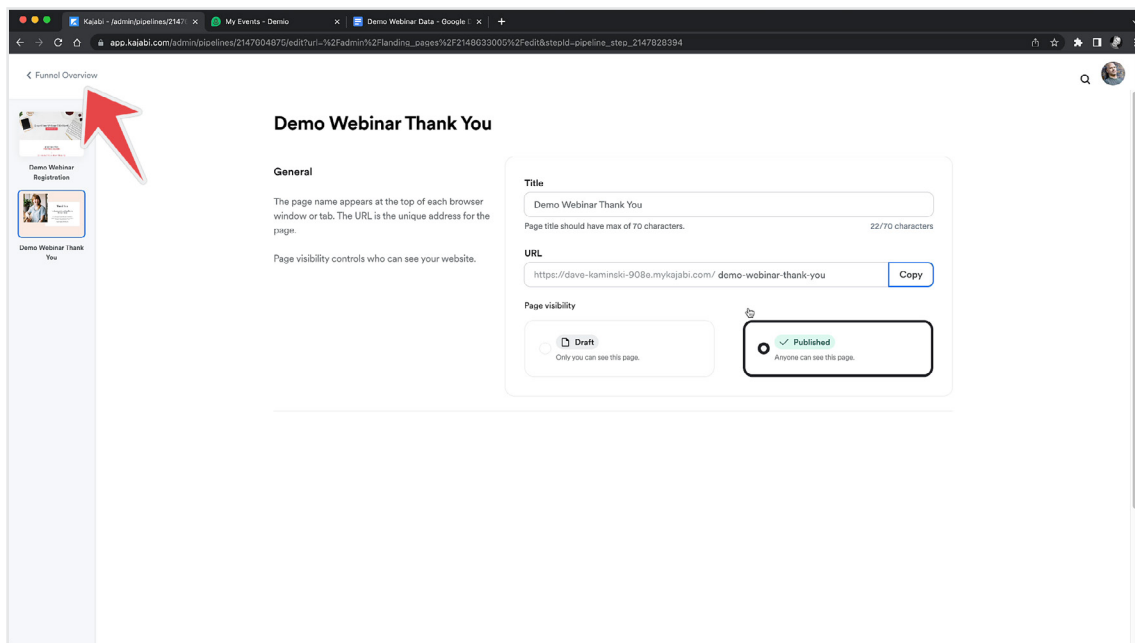
Now go back up the the URL field and click on **Copy**:



Now go back into your Google Doc and paste in the URL of the thank you or confirmation page that you just copied:



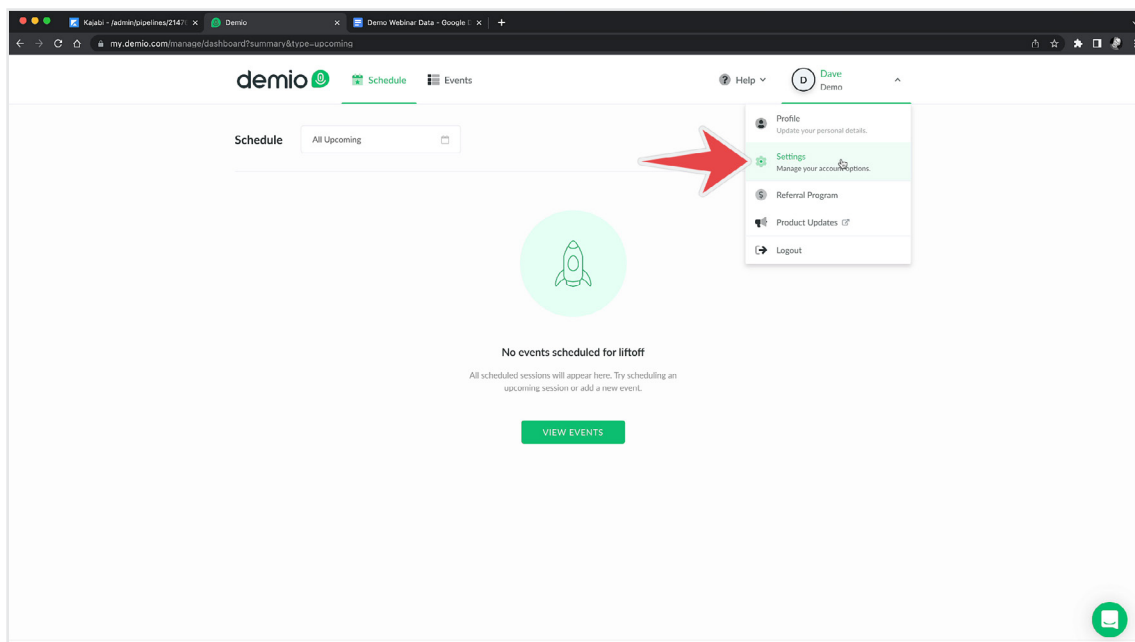
Back in Kajabi, go to the upper left and click on **Funnel Overview**:



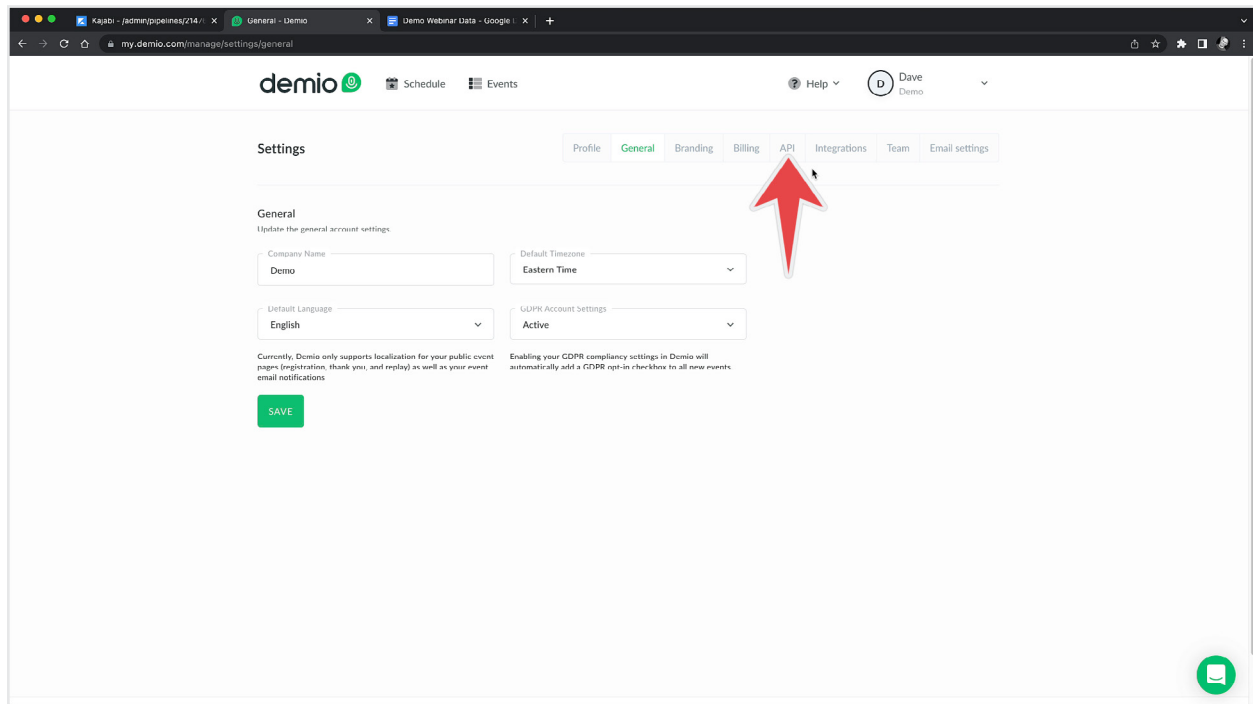
Okay, that's it for Kajabi. At least for now. Next, we are going to work in Demio.

In order to use Demio as your webinar service, you will need an account with Demio and Amy has a special link where you can sign up.

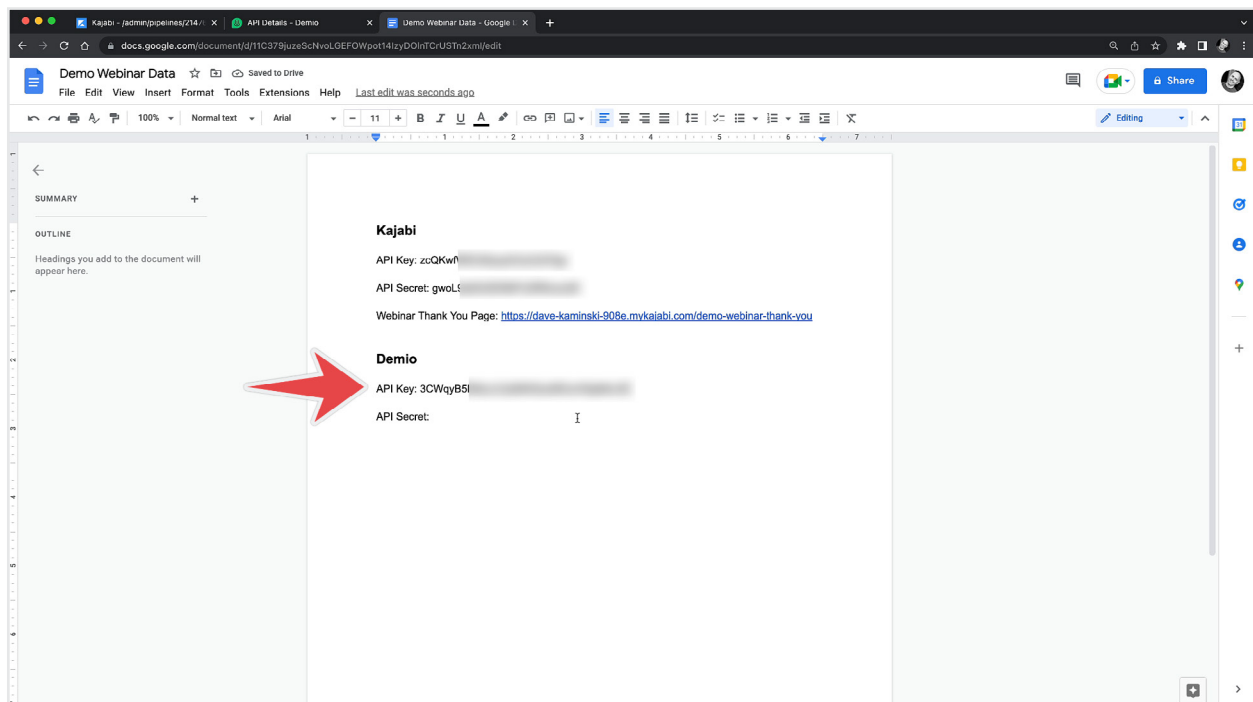
After you have created your Demio account, log in and go to the upper right hand corner next to your name, click on the carrot, then go down and select **Settings**:



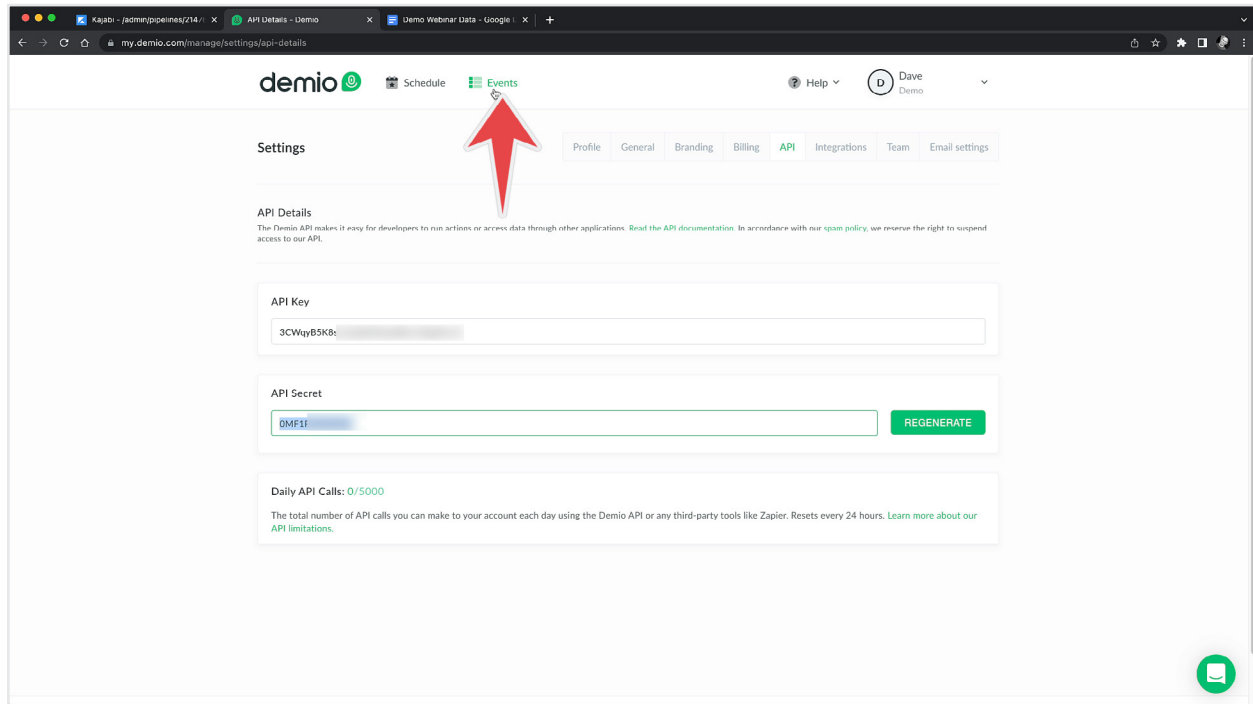
Then I want you to go over to the tab that says **API** and click on it:



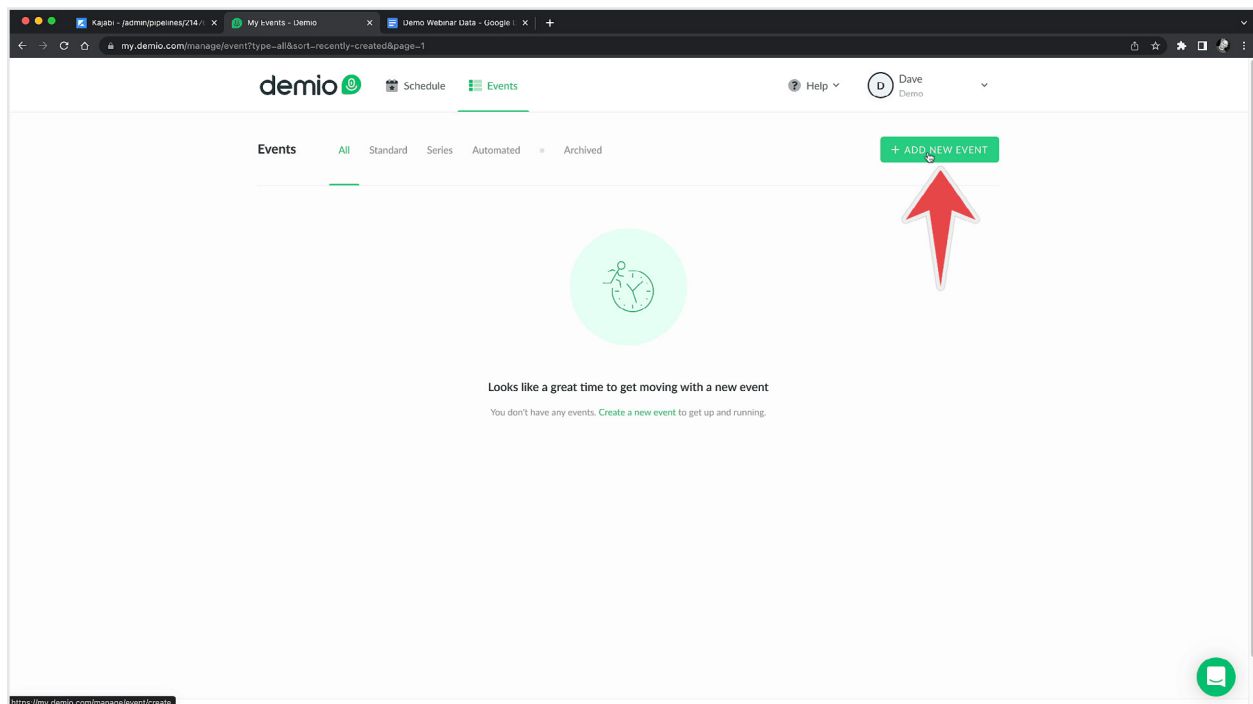
You will see both an **API key** and an **API secret**. Copy both of those and paste them into your Google Doc:



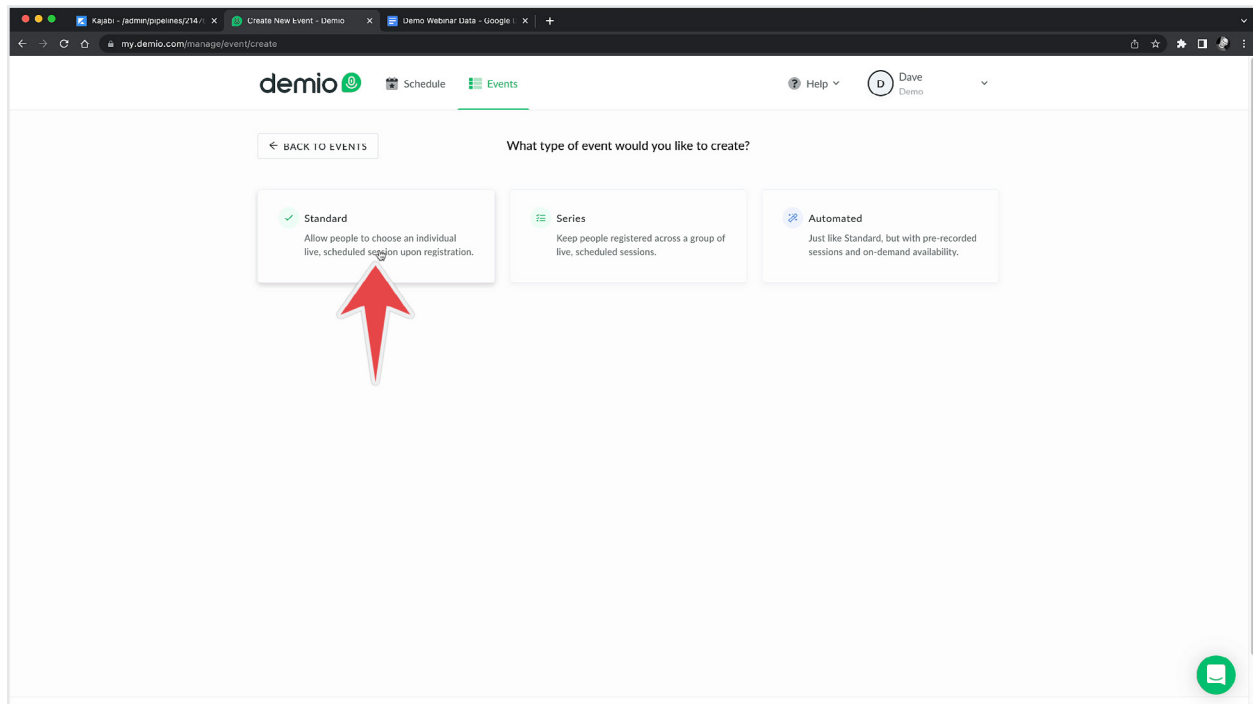
Now it's time to start scheduling your webinars. Back in Demio, go to the menu at the top and click on **Events**:



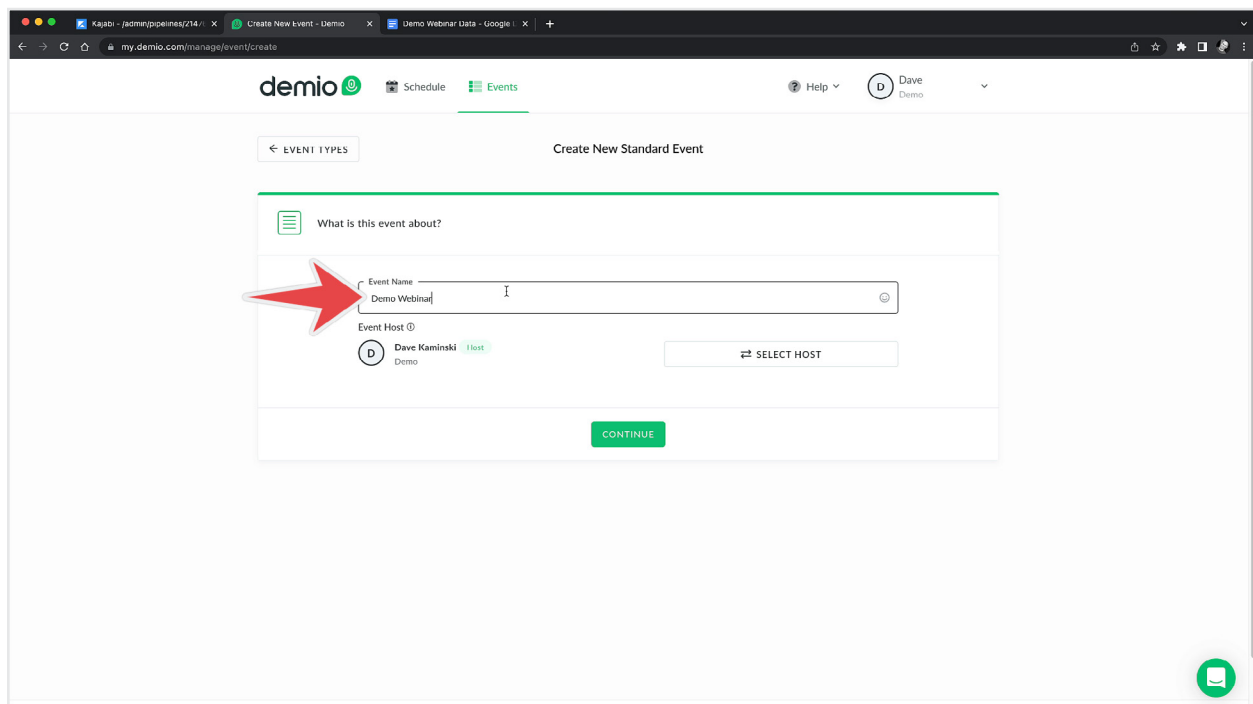
Then go over and click on the **Add New Event** button:



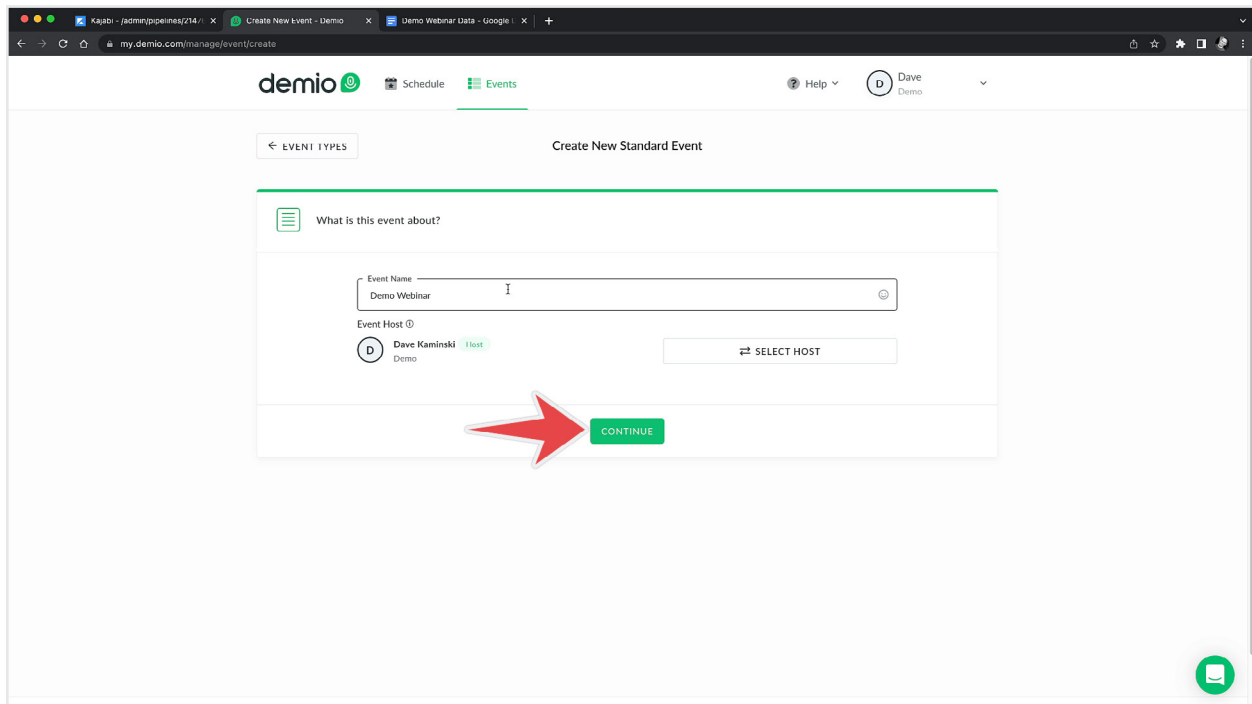
From the list that appears, select **Standard**:



Then give your event a name that makes sense to you. The name that you enter here will be used for all of your live webinars. For example, I've named mine Demo Webinar:

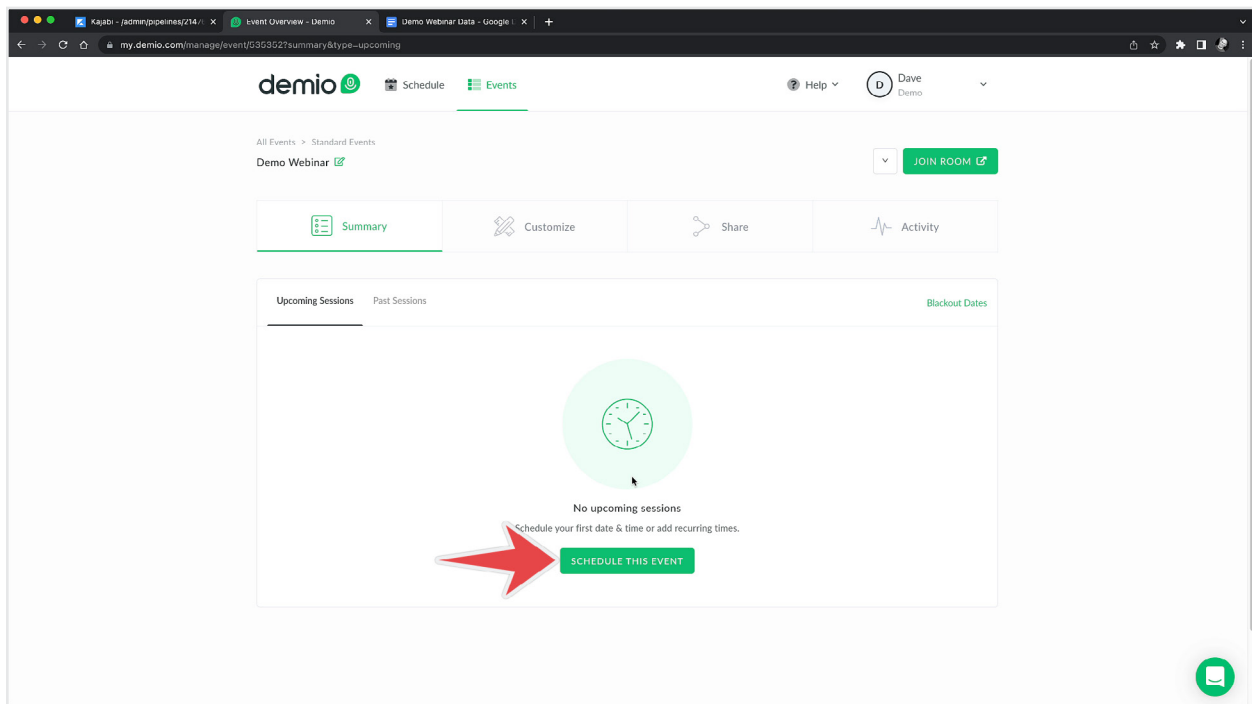


Then click on **Continue**:



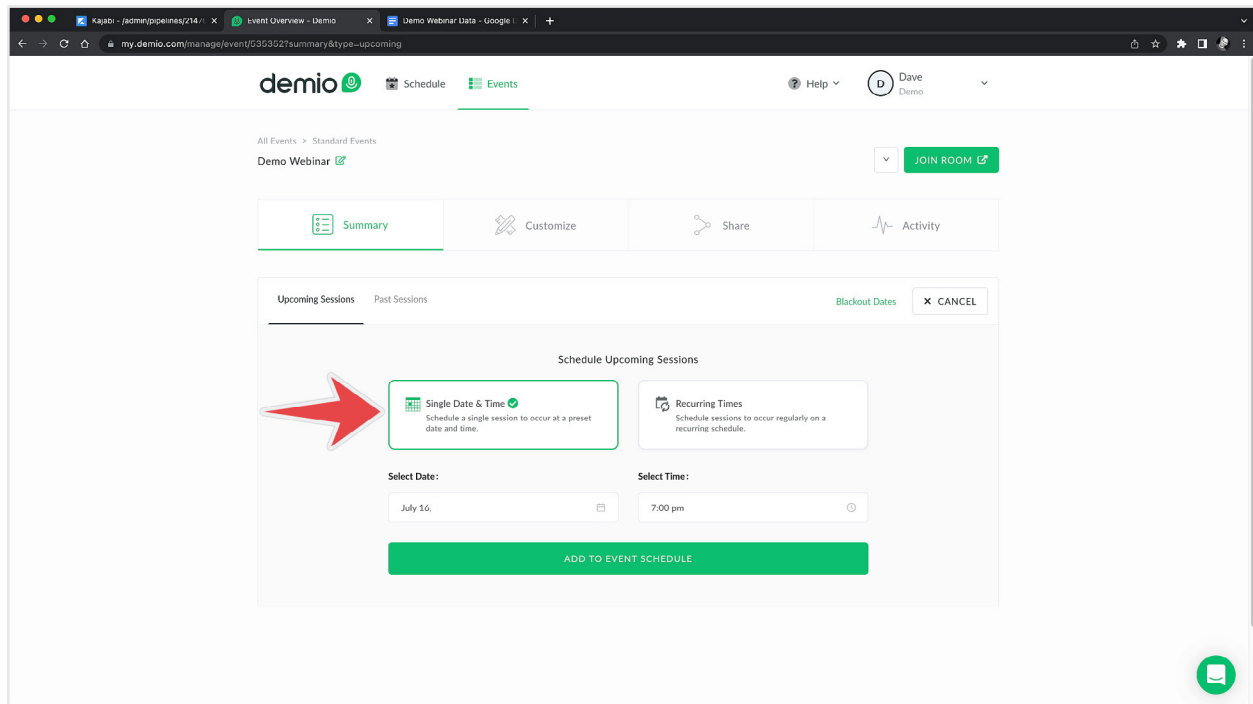
The screenshot shows the 'Create New Standard Event' page in the Demio application. The page has a header with the Demio logo, 'Schedule' and 'Events' tabs, and a user profile for 'Dave Demo'. Below the header, there's a section titled 'What is this event about?' with a form. The form includes an 'Event Name' field with the text 'Demo Webinar', an 'Event Host' dropdown menu showing 'Dave Kaminski' as the selected host, and a 'SELECT HOST' button. A large red arrow points to a green 'CONTINUE' button at the bottom of the form.

Next, under the summary tab, click on **Schedule This Event**:

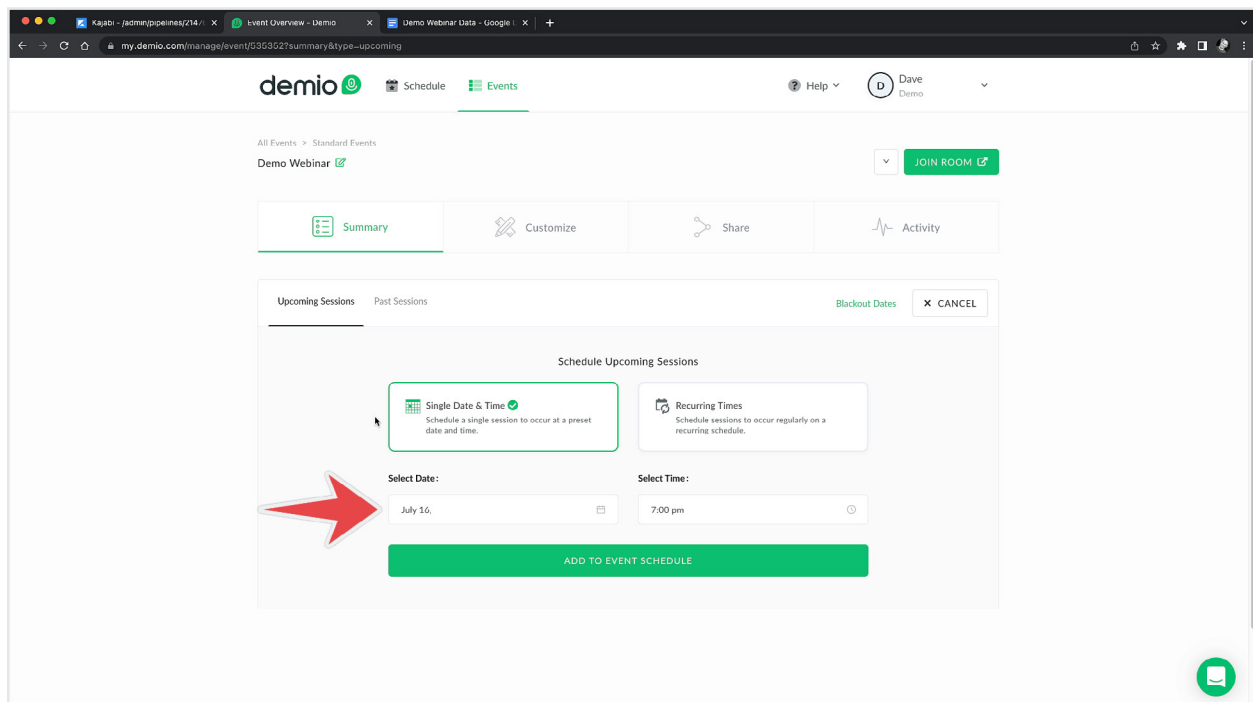


The screenshot shows the 'Event Overview' page in the Demio application. The page has a header with the Demio logo, 'Schedule' and 'Events' tabs, and a user profile for 'Dave Demo'. Below the header, there's a section titled 'Demo Webinar' with a 'JOIN ROOM' button. Below this, there's a tabbed interface with 'Summary', 'Customize', 'Share', and 'Activity' tabs. The 'Summary' tab is active, showing 'Upcoming Sessions' and 'Past Sessions' sections. The 'Upcoming Sessions' section displays a large clock icon and the text 'No upcoming sessions' and 'Schedule your first date & time or add recurring times.' A large red arrow points to a green 'SCHEDULE THIS EVENT' button at the bottom of the 'Upcoming Sessions' section.

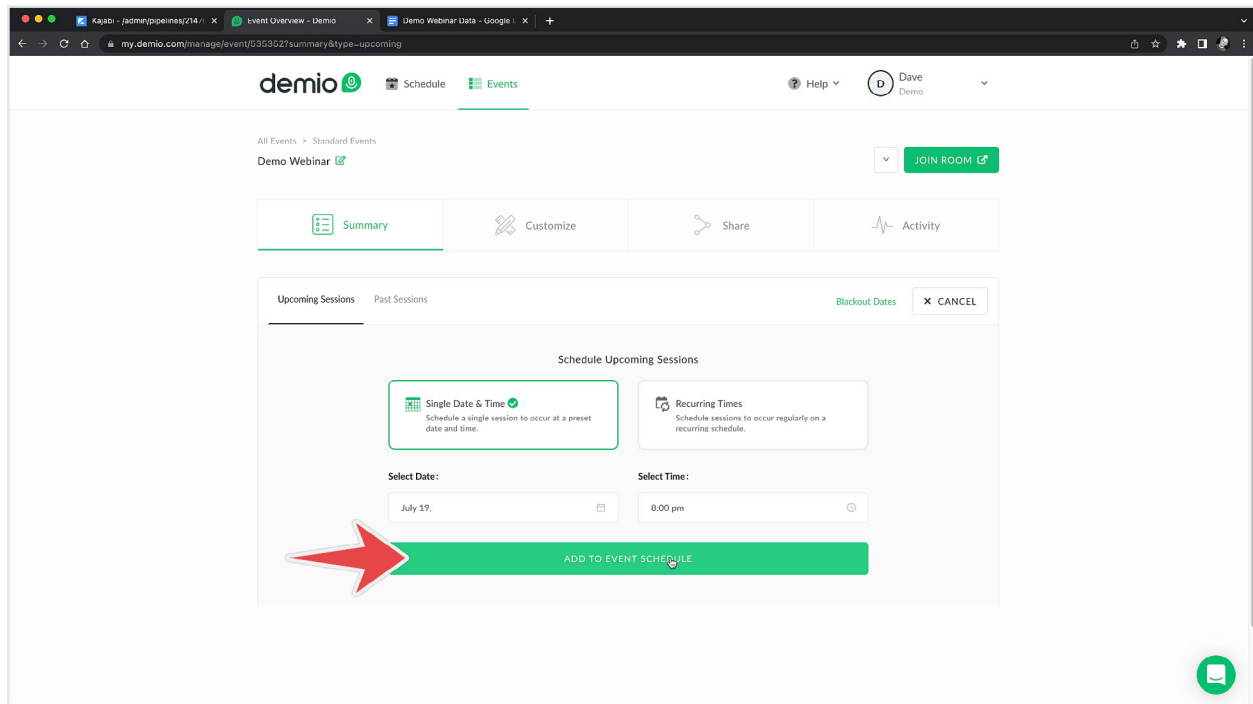
Make sure that **Single Date and Time** is selected:



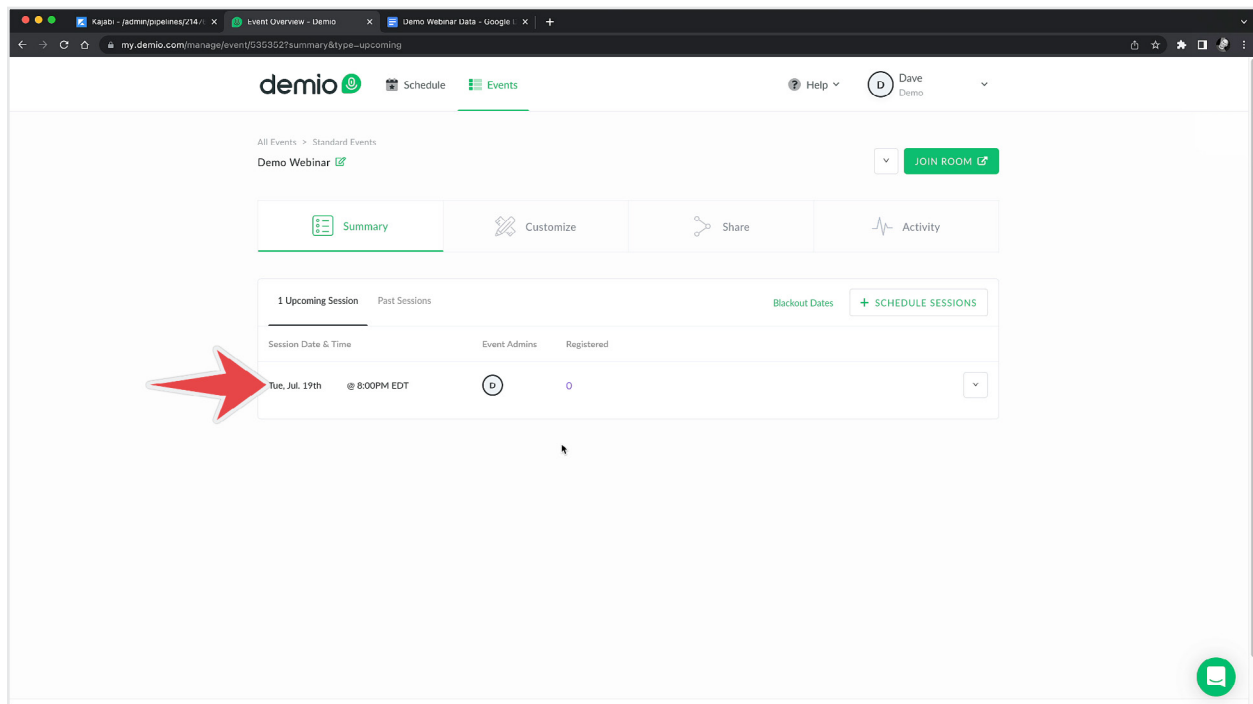
Below that, set the date and time for your first webinar using the dialog options for each:



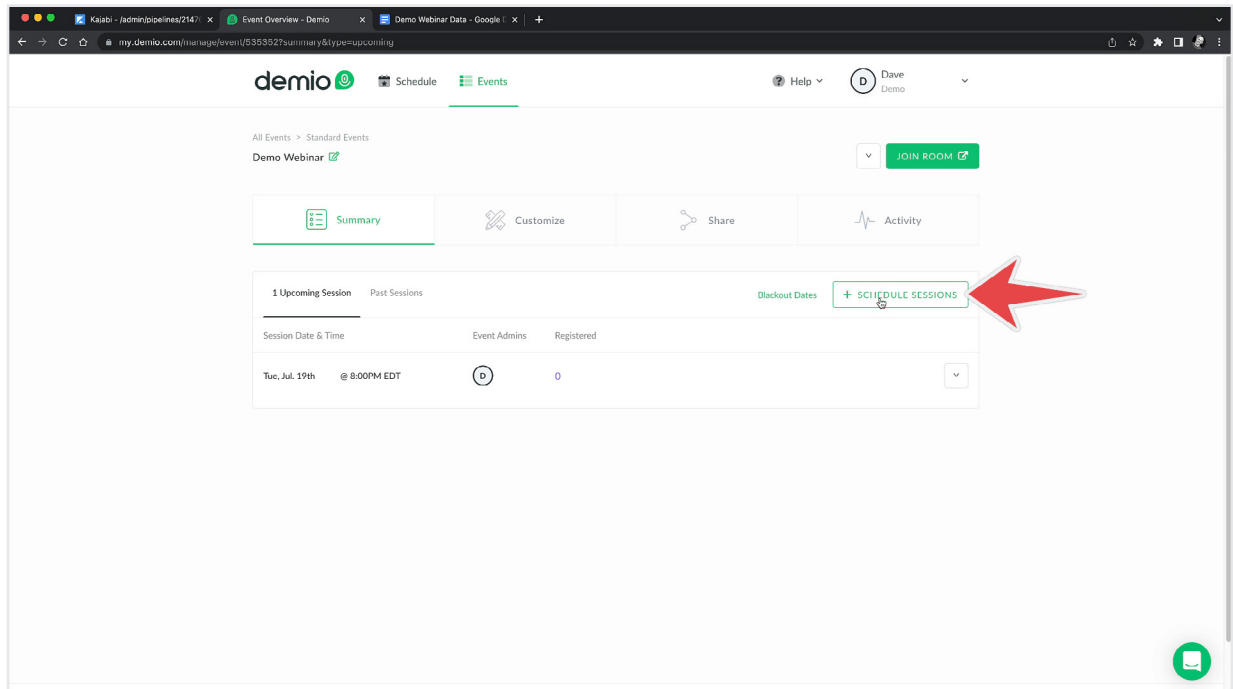
When you're finished, click on **Add to Event Schedule**:



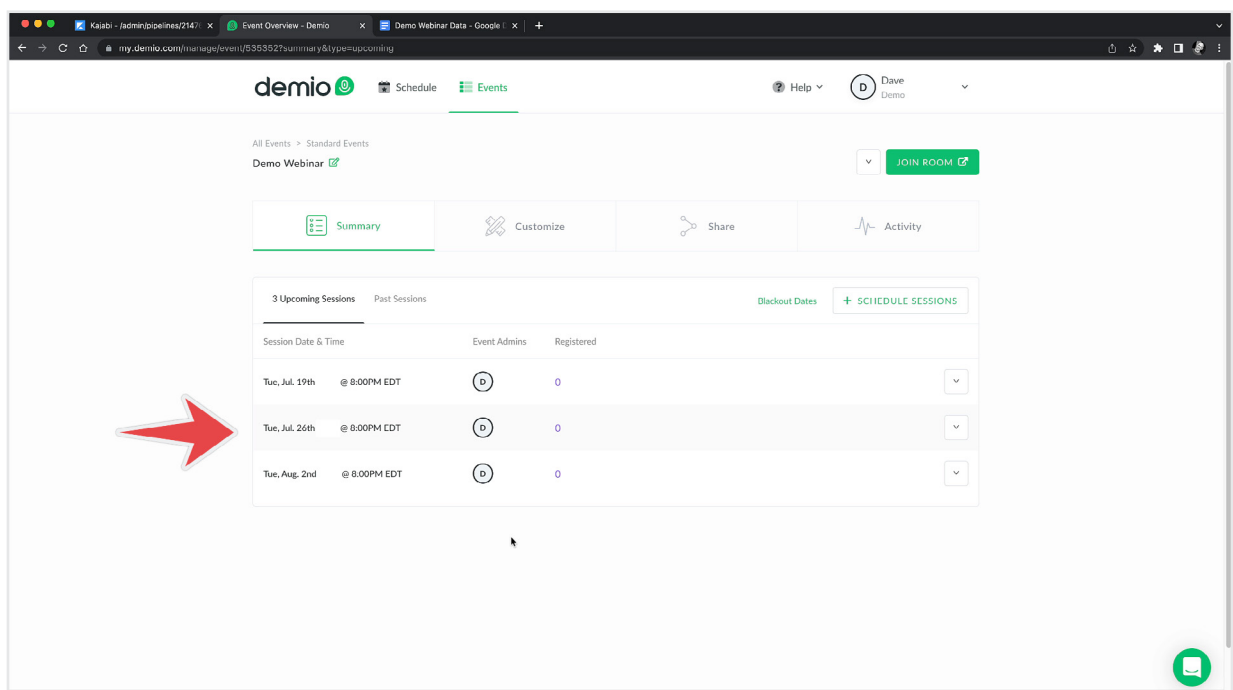
You'll see that your first webinar has been scheduled:



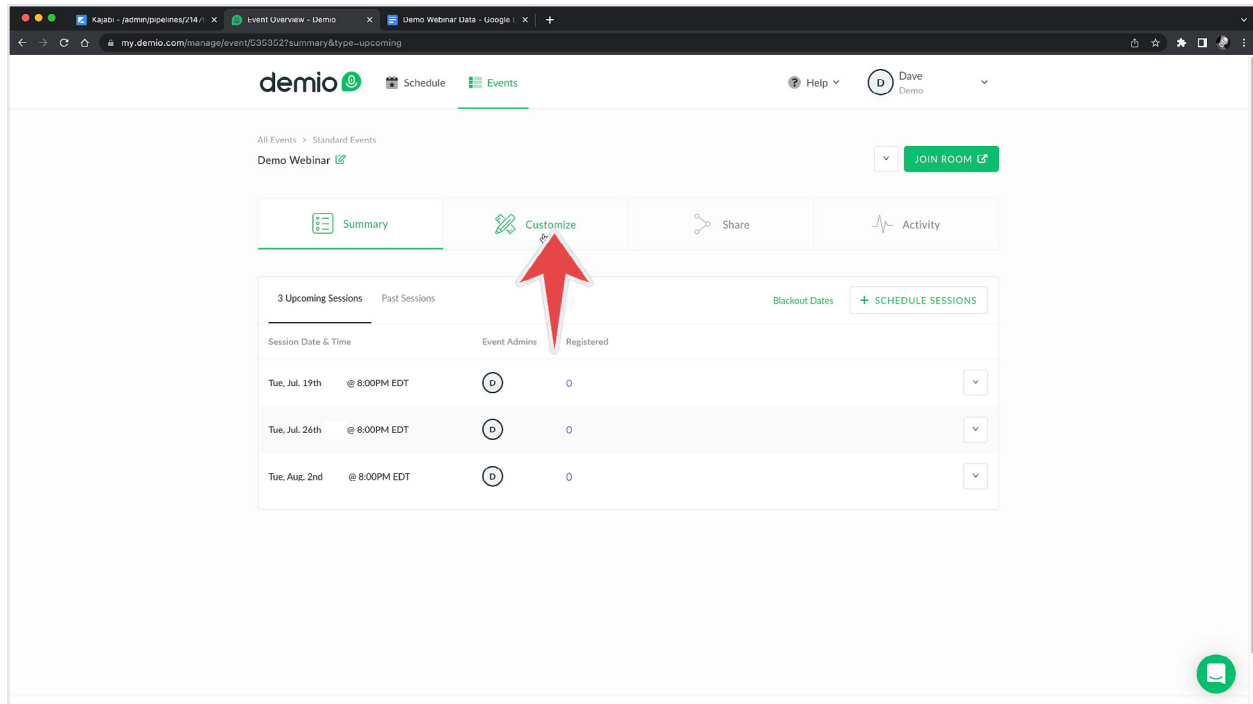
We have our first webinar scheduled. But in Amy's framework we'll be doing three webinars. And now it's time to schedule the remaining two webinars. So click on the button that says **Schedule Sessions**:



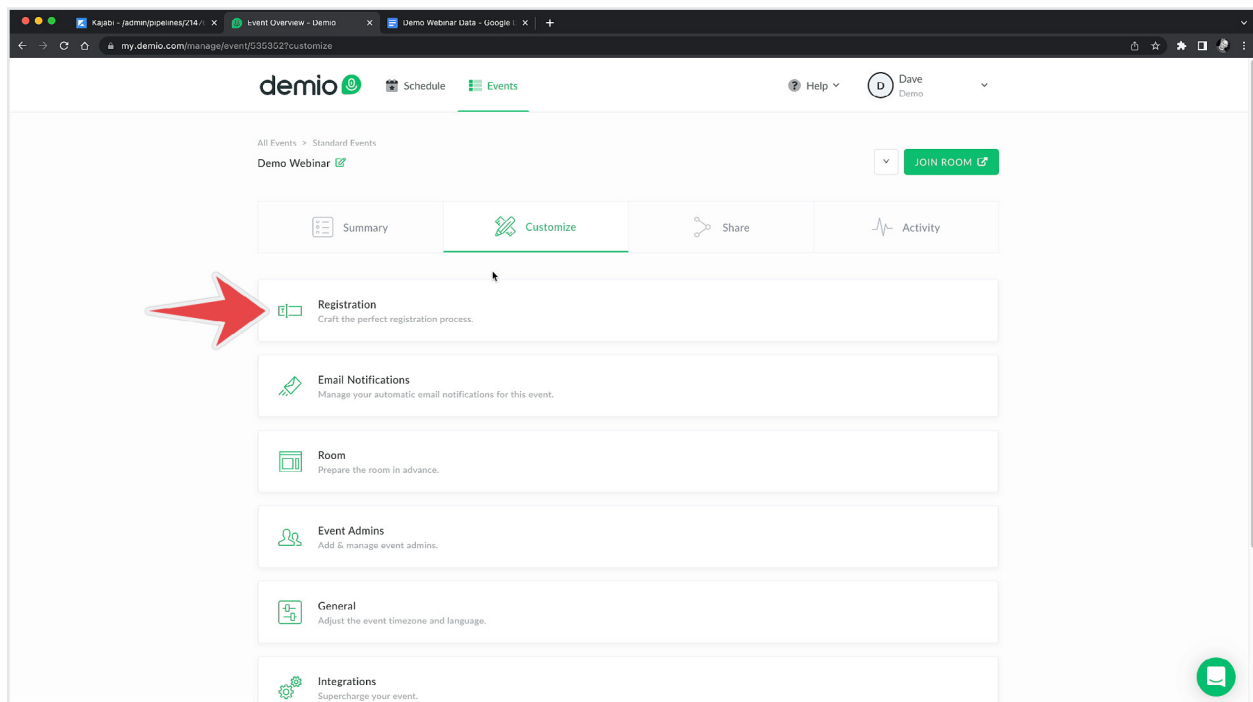
And then repeat the same exact process just described to schedule your remaining webinars. When all three of your webinars are scheduled, it will look similar to this:



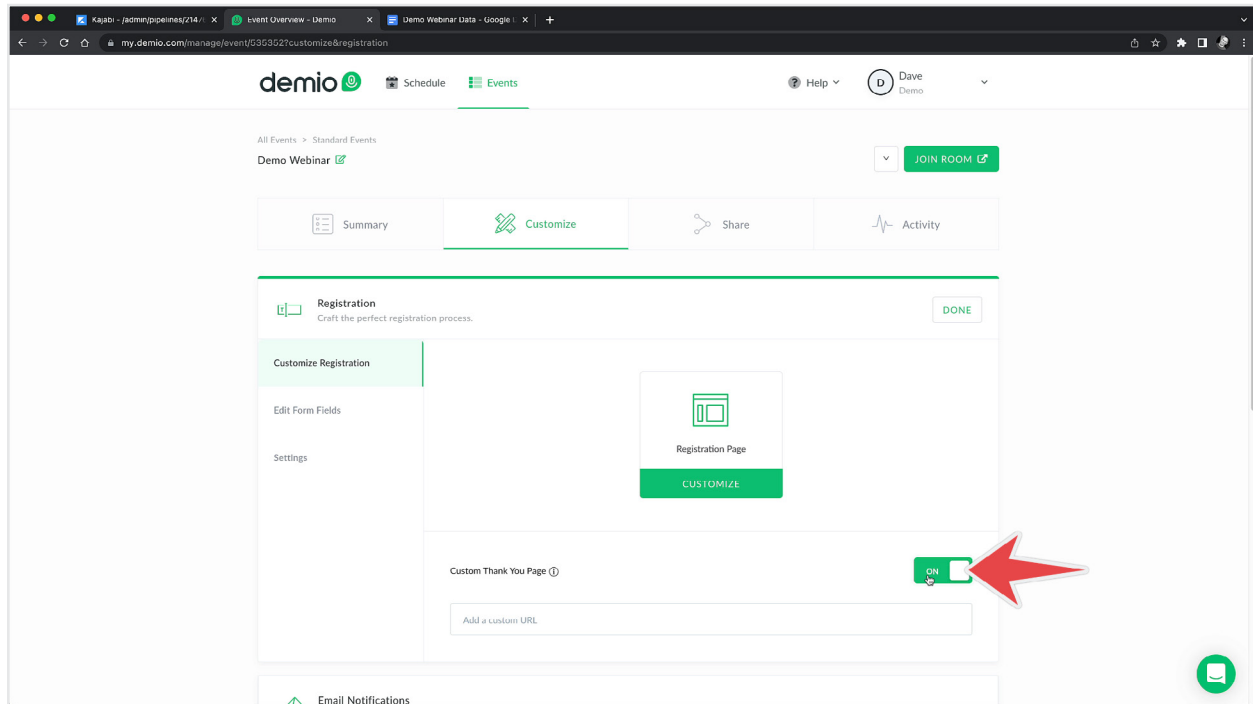
With your webinars scheduled, now it's time to do a little more work in Demio. To begin, go up and click on the **Customize** tab:



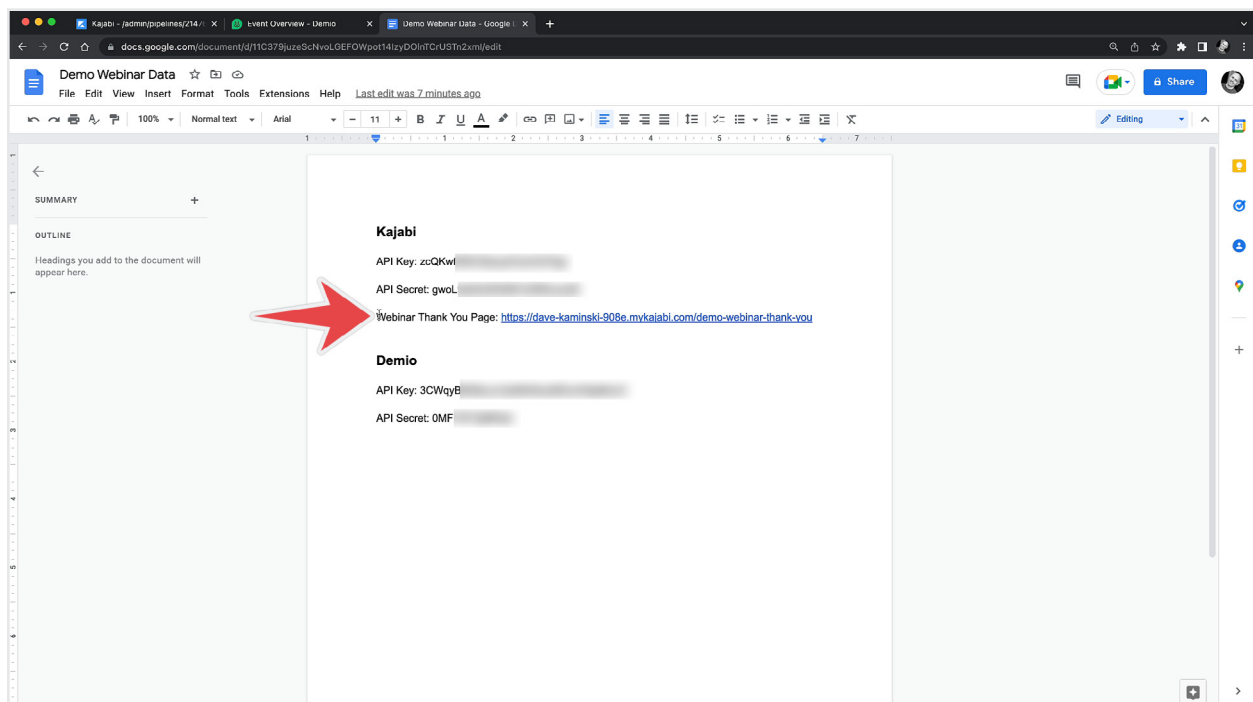
Then go down and click on the **Registration** block:



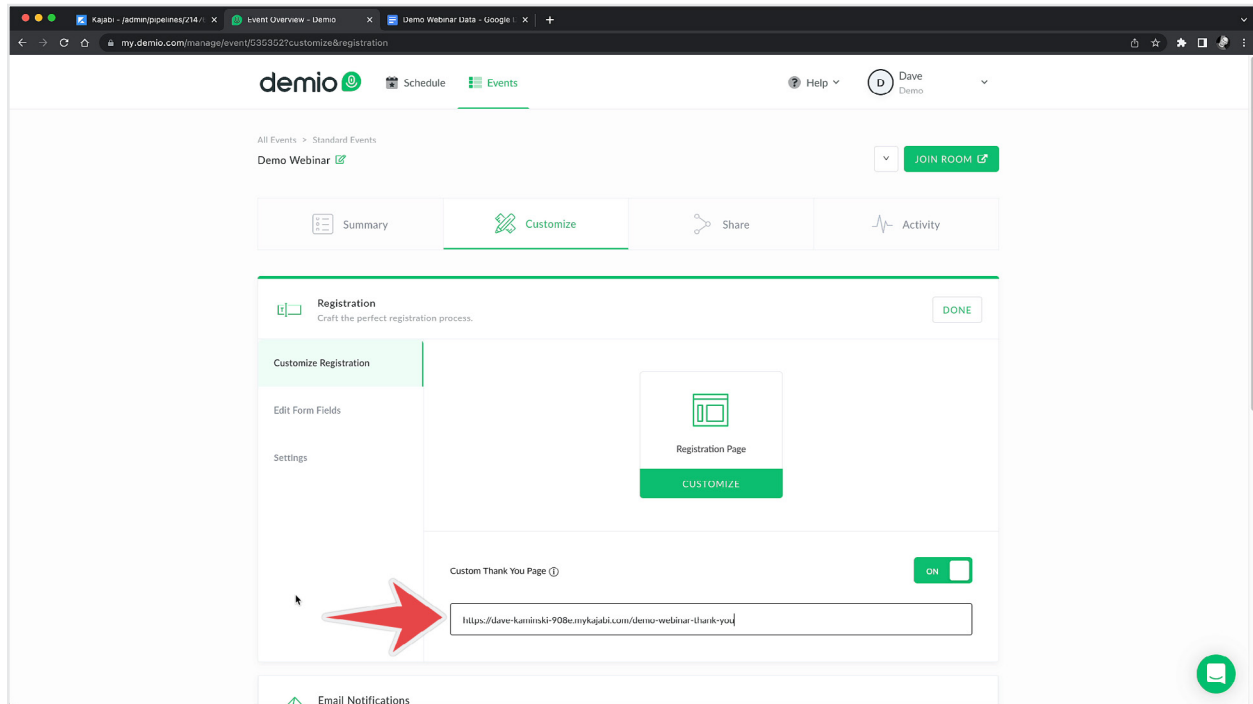
Under **Custom Registration**, navigate down to where it says **Custom Thank you Page** and turn it on:



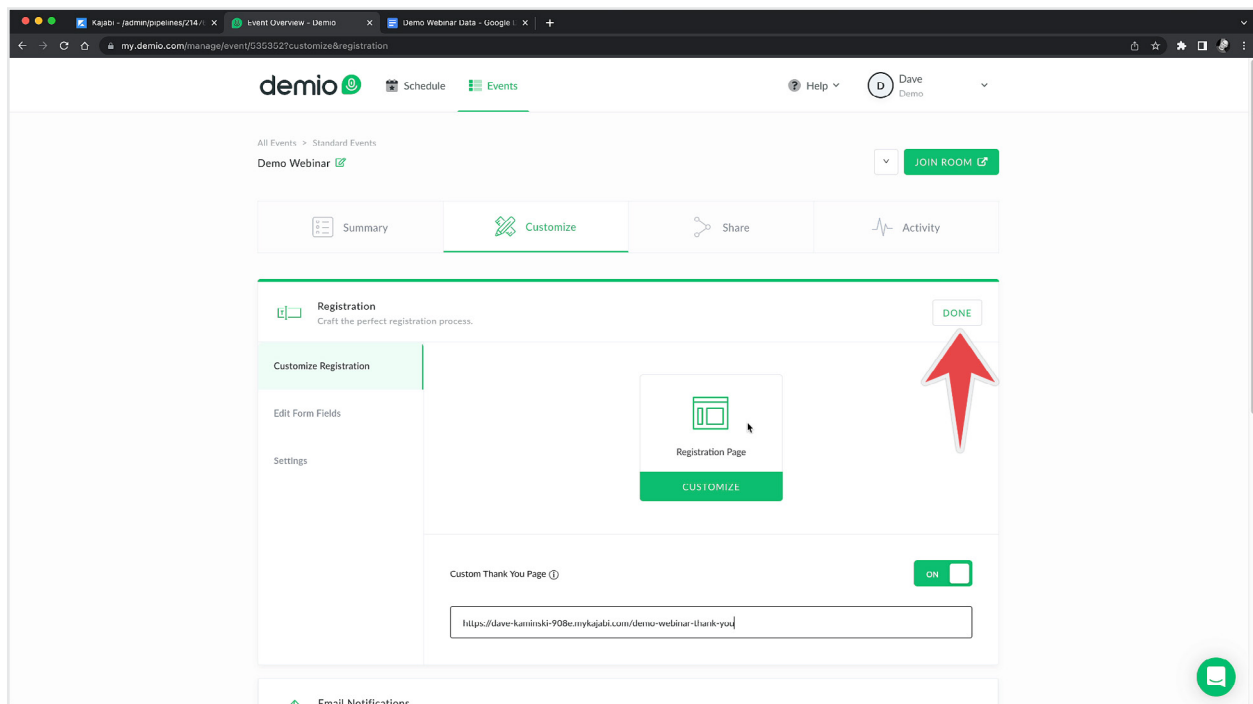
Now we need to add the **thank you page URL** that we copied earlier from Kajabi and placed in our Google Doc. Go to your Google Doc and copy that URL:



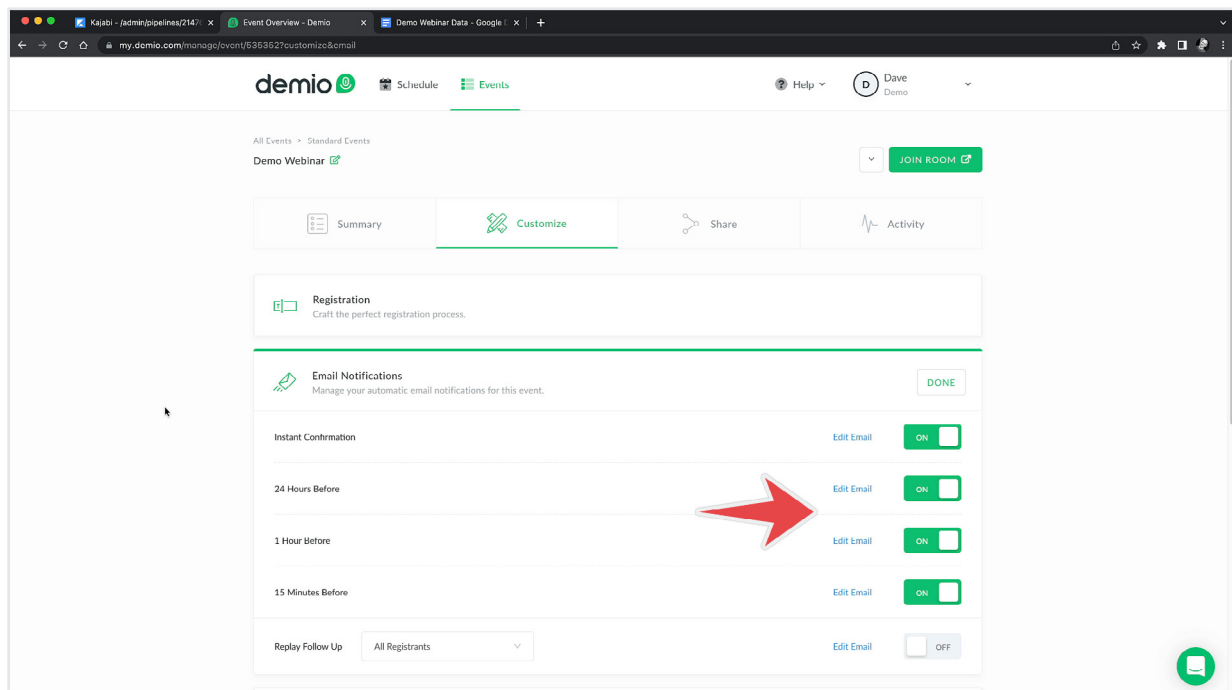
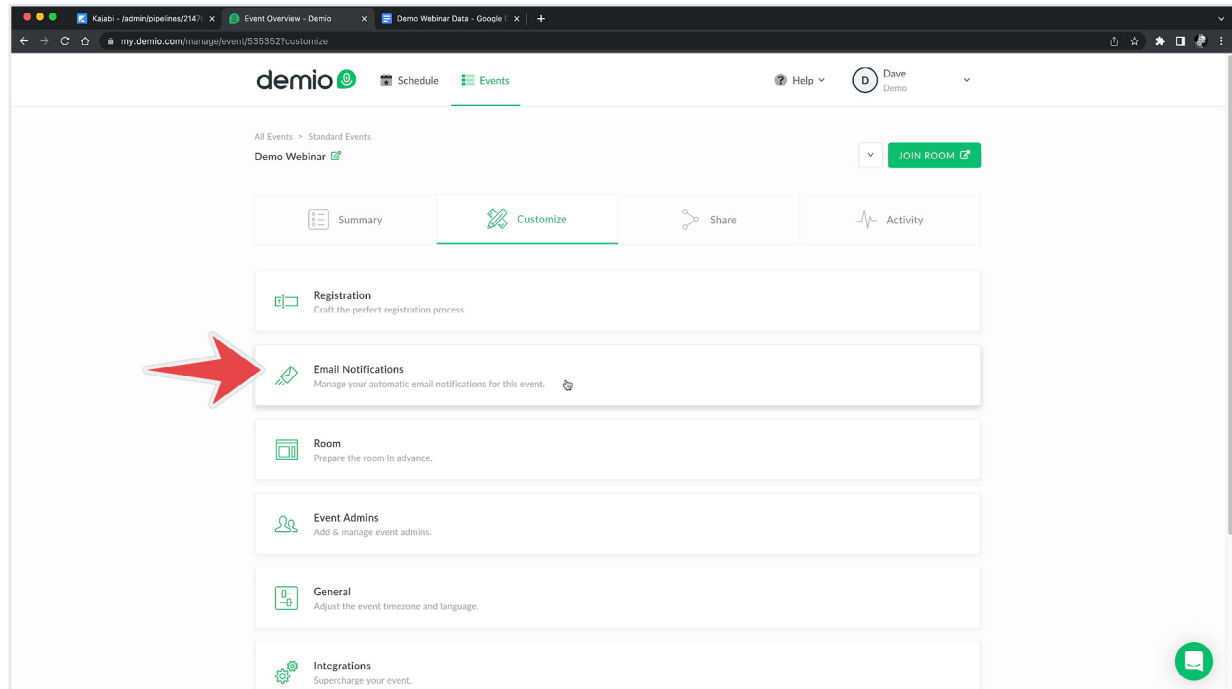
Back in Demio, paste in that URL. Now, every time someone registers for any of your three webinars, they will automatically be redirected to this page:



To finish, go up and click on **Done**:

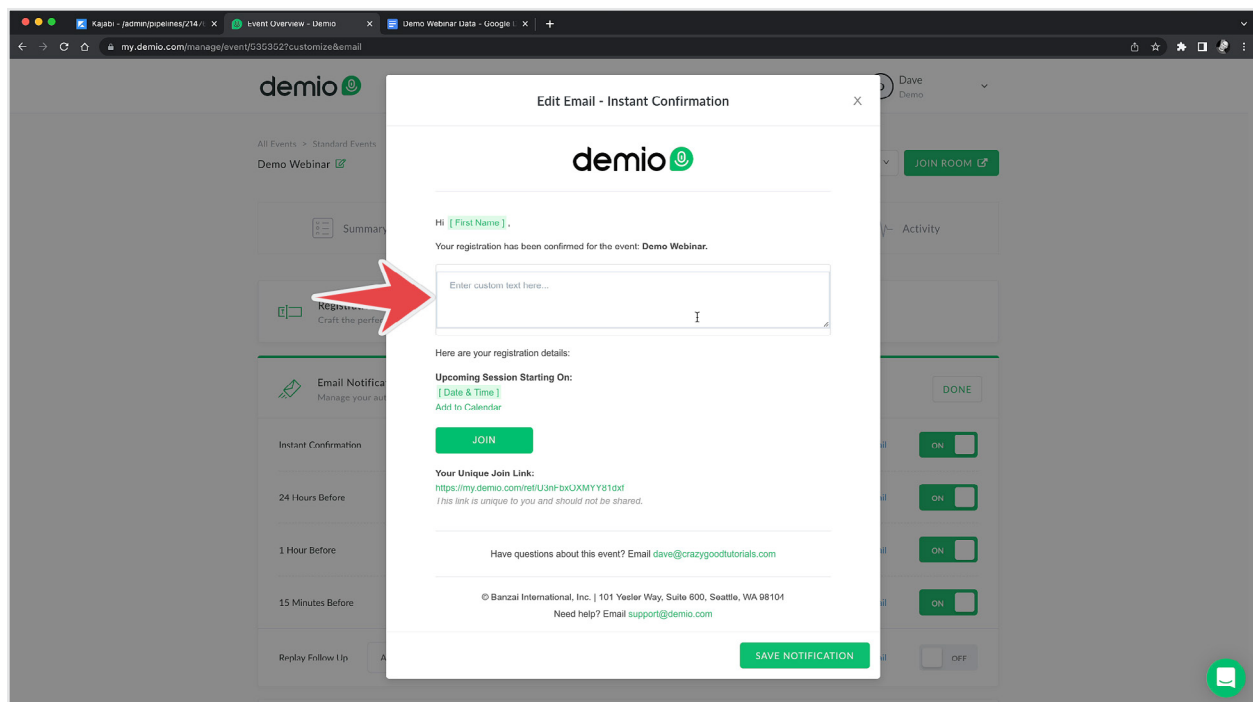
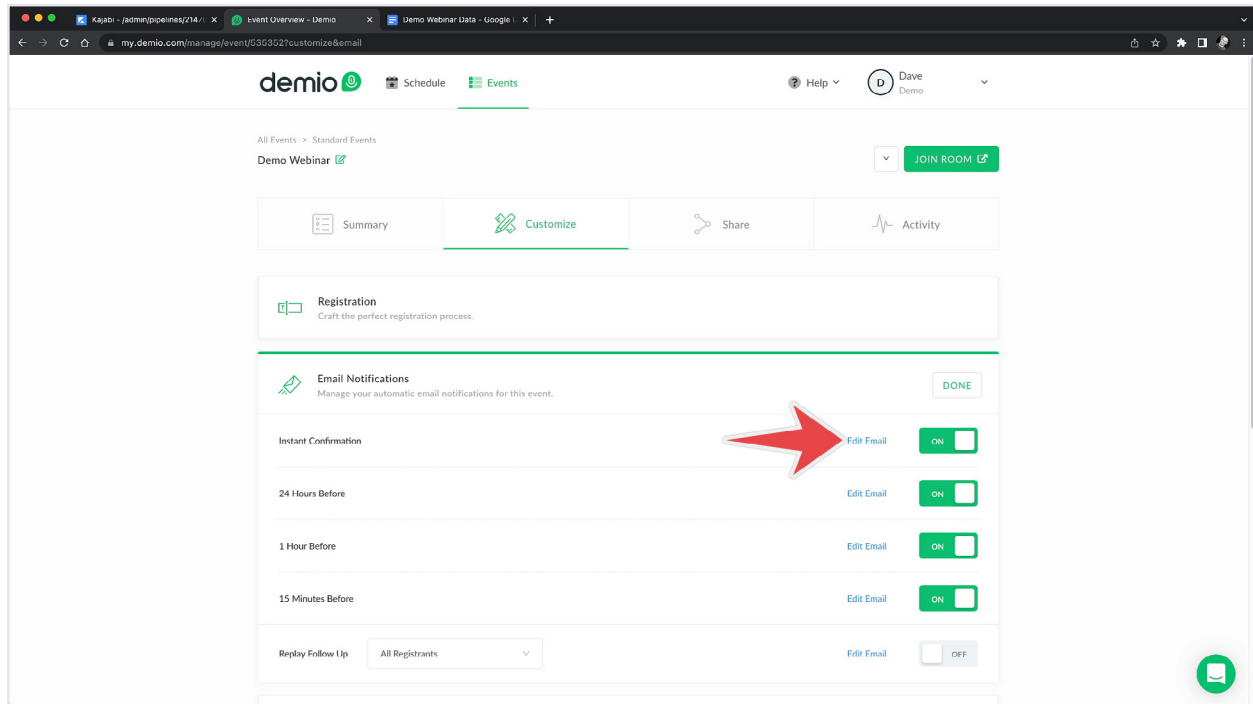


Now it's time to make sure your email notifications are set, so click on **Email Notifications**:

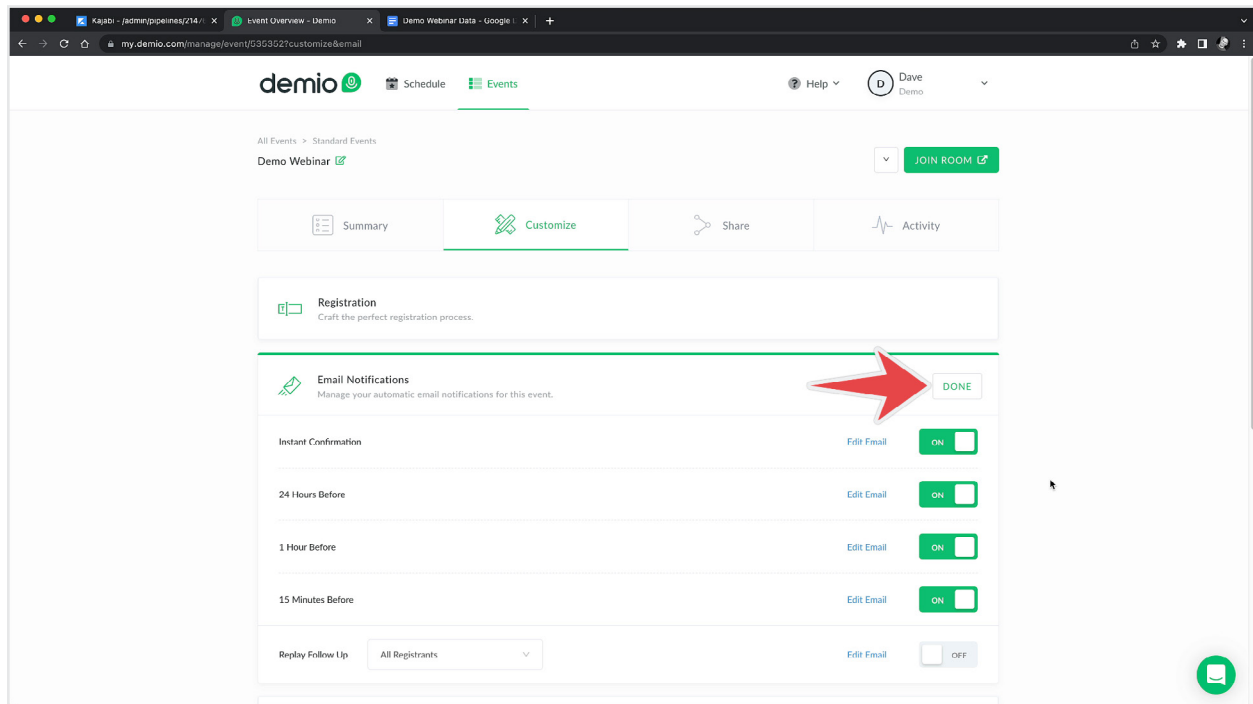


These are the email reminders that Demio will automatically send out to the people who register for your webinars and we just want to double-check that they are turned on. We will be sending out additional marketing emails outside of Demio, but we want Demio to send the webinar reminders.

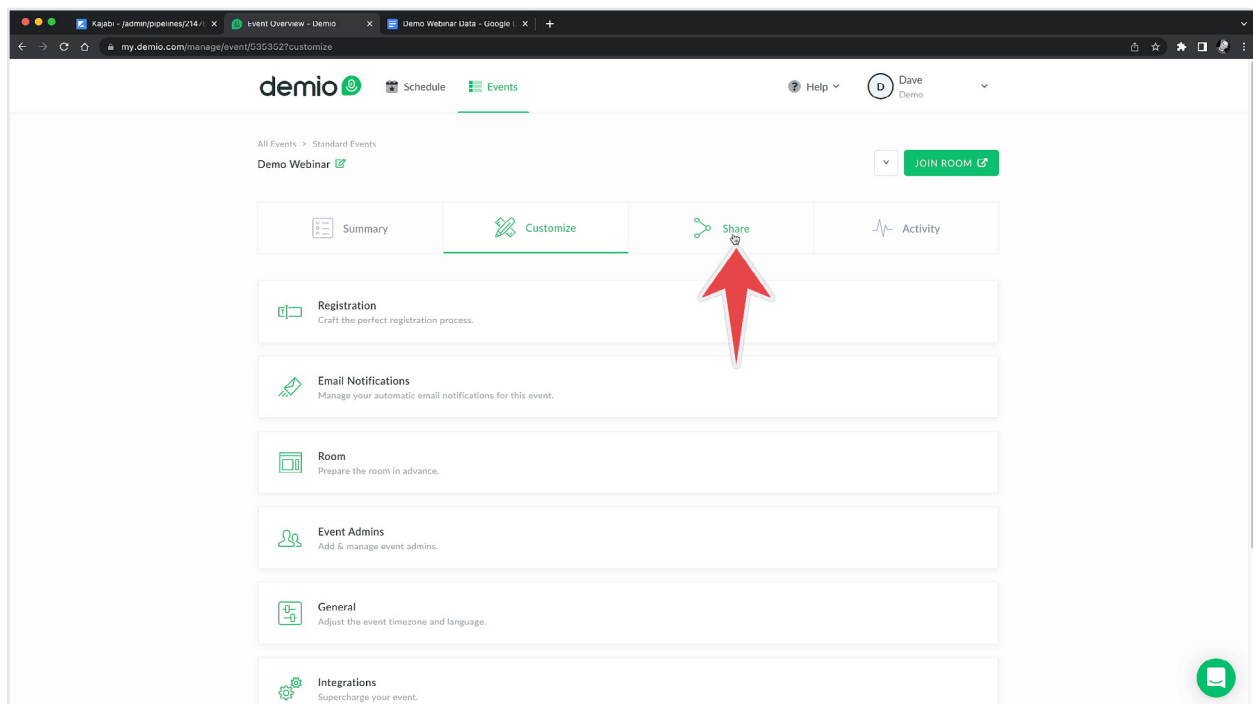
Optionally, you could add some extra content to these emails by clicking the **Edit** link next to each email:



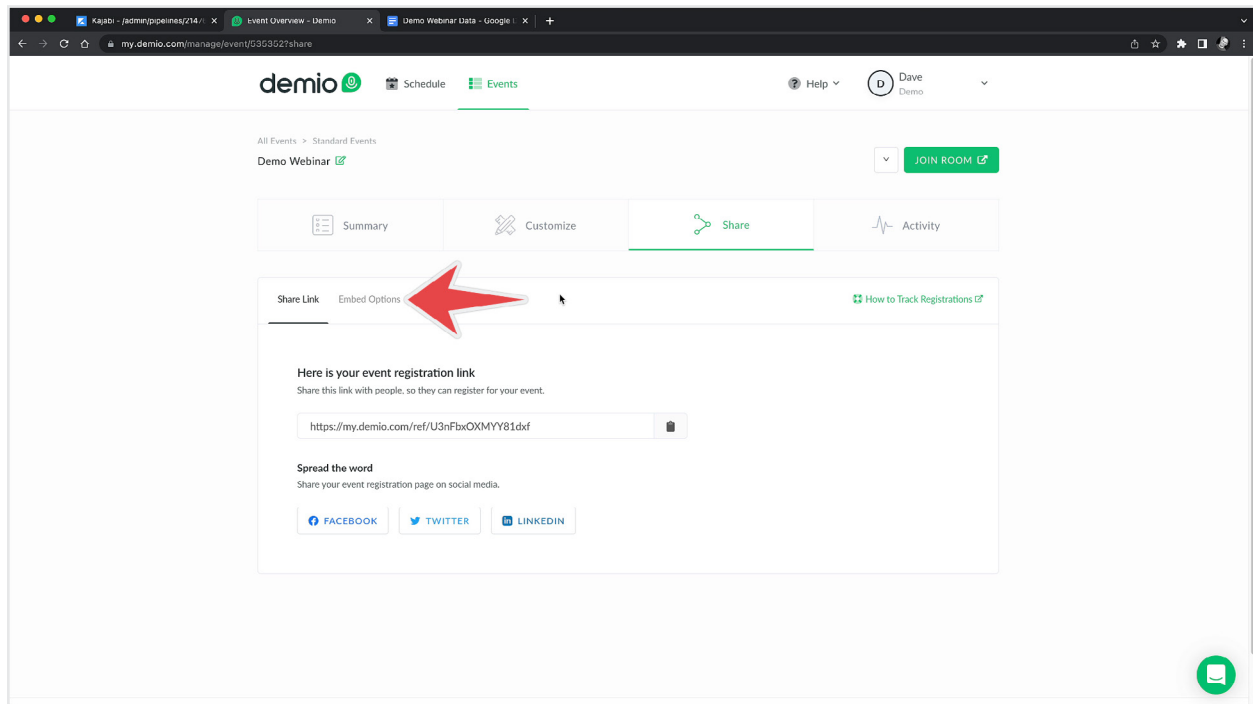
If you've made any changes to the emails, click on **Done**:



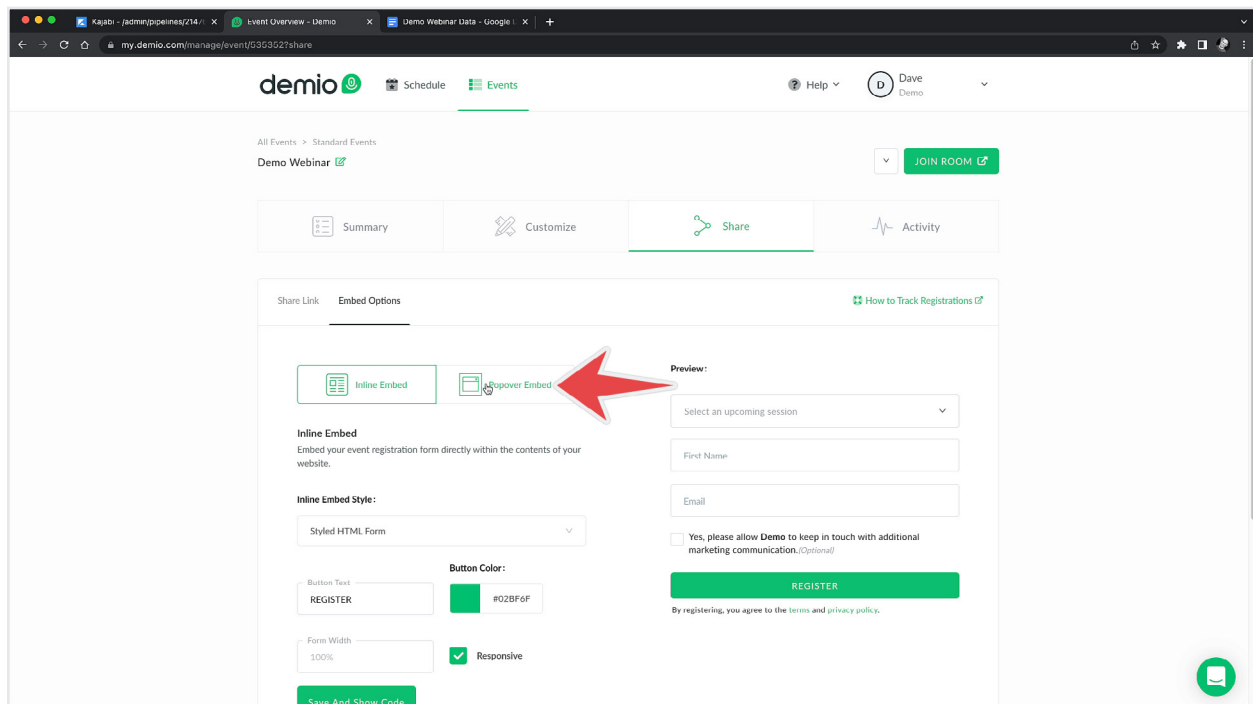
Now it's time to work on the popup that will appear when someone clicks the registration button on your webinar registration page. This popup will contain the list of your available webinar times. To begin, click on the **Share** tab:



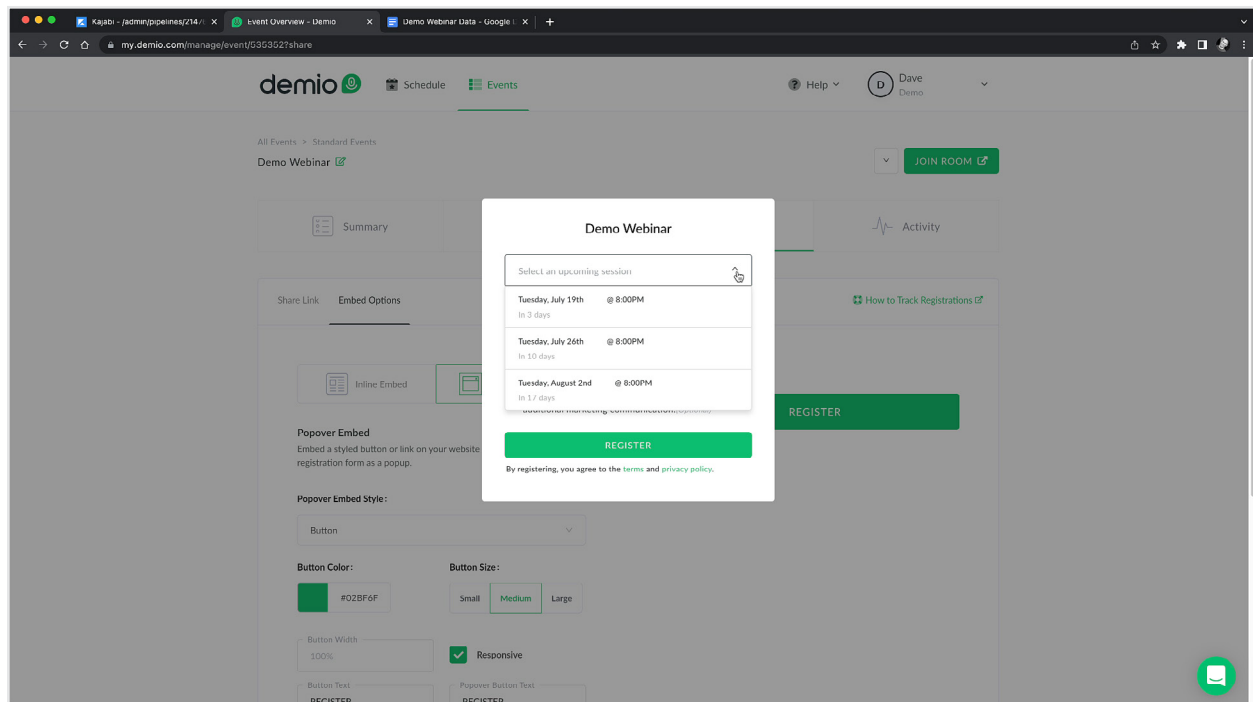
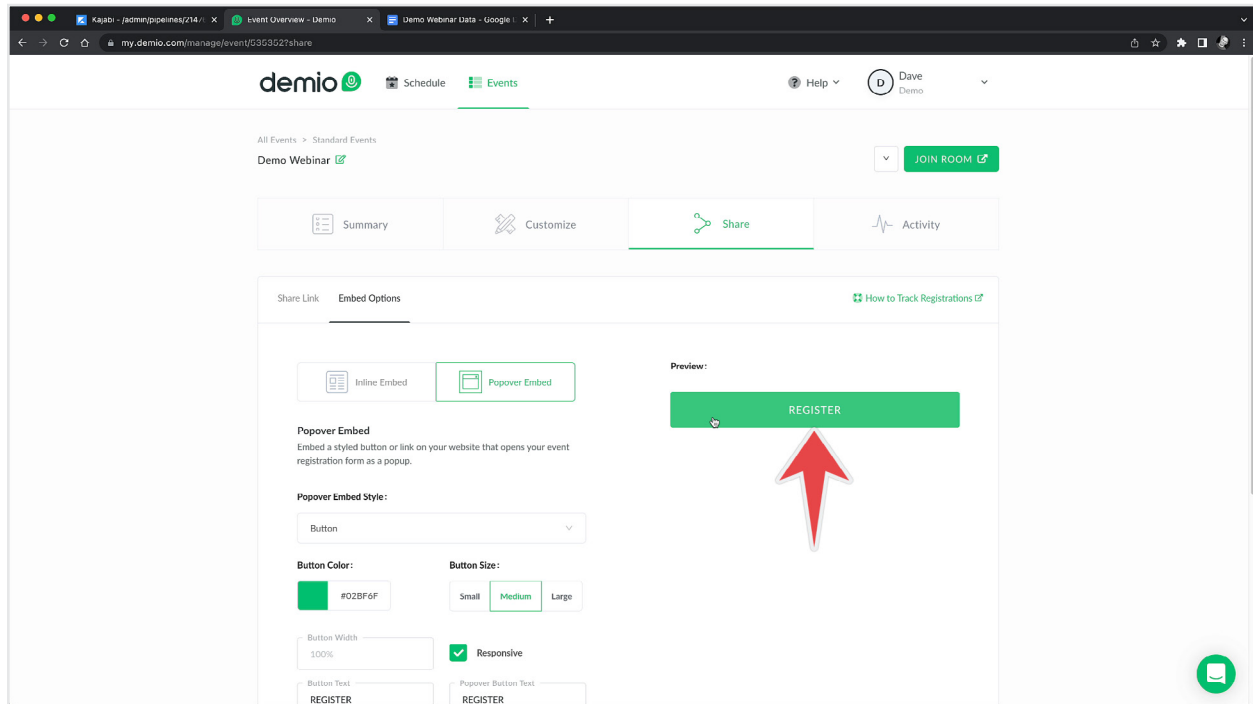
Then click on **Embed Options**:



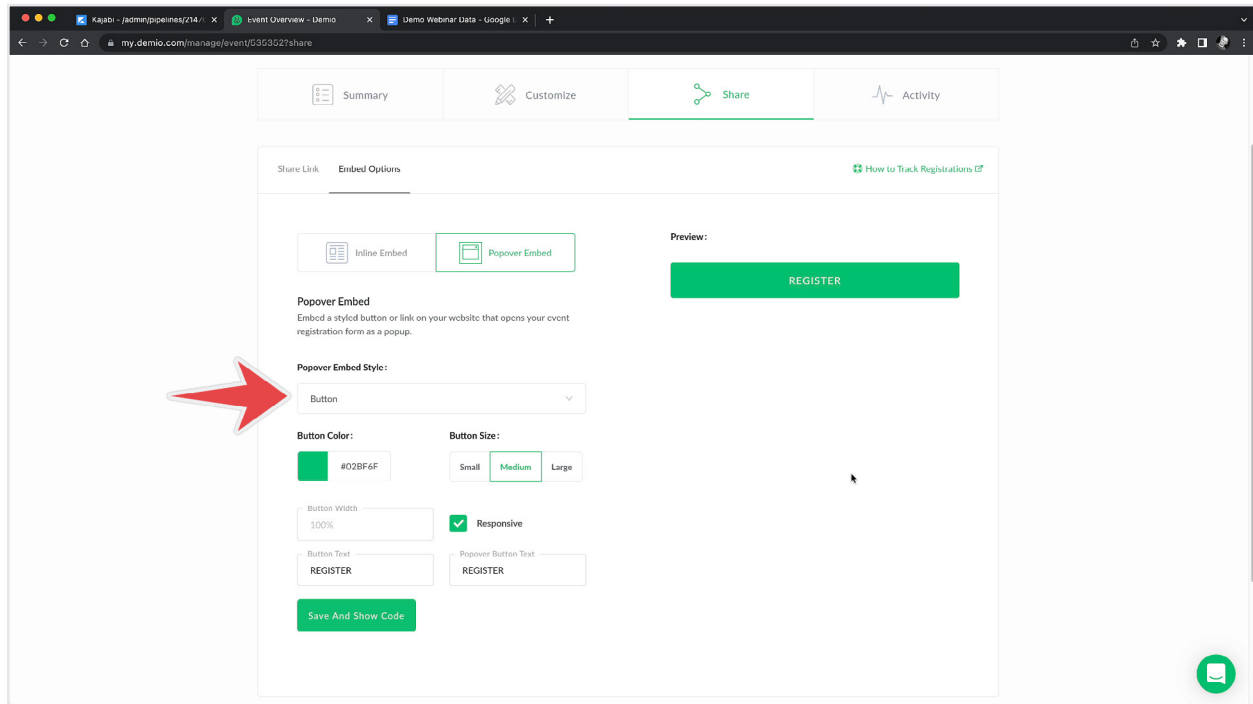
Next, click on **Popover Embed**:



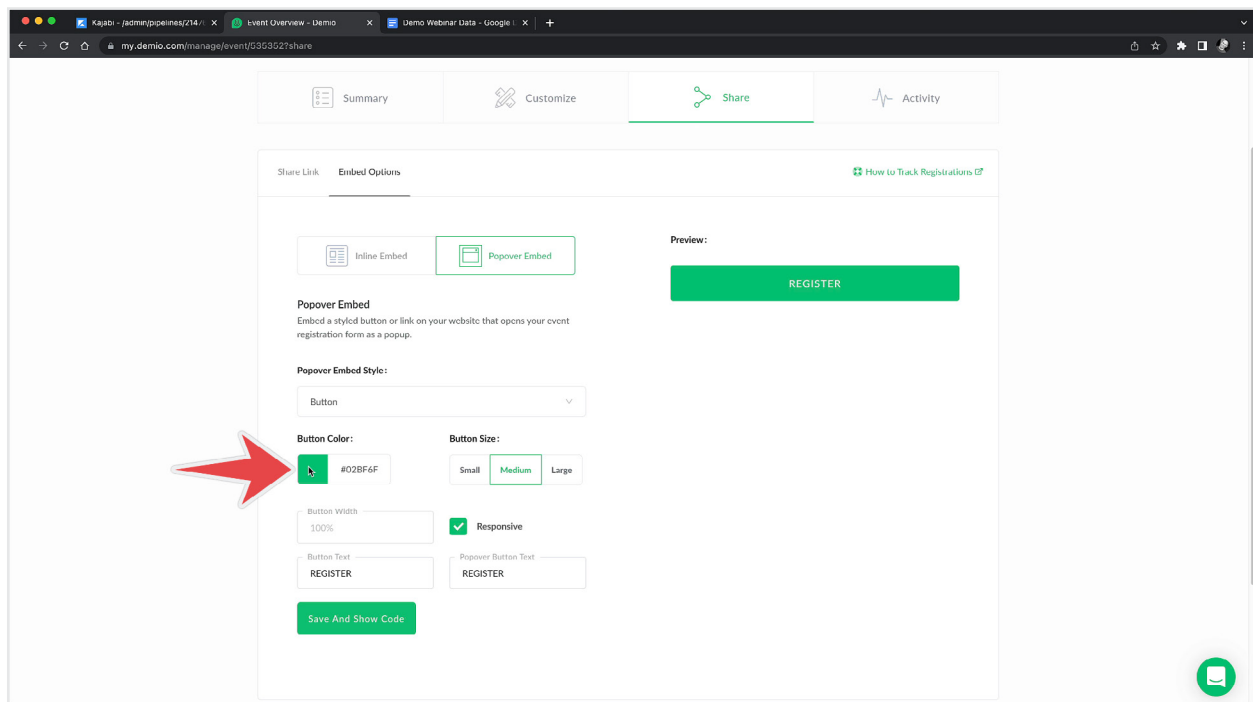
You can click on the button to preview what the popup will look like on your webinar registration page:



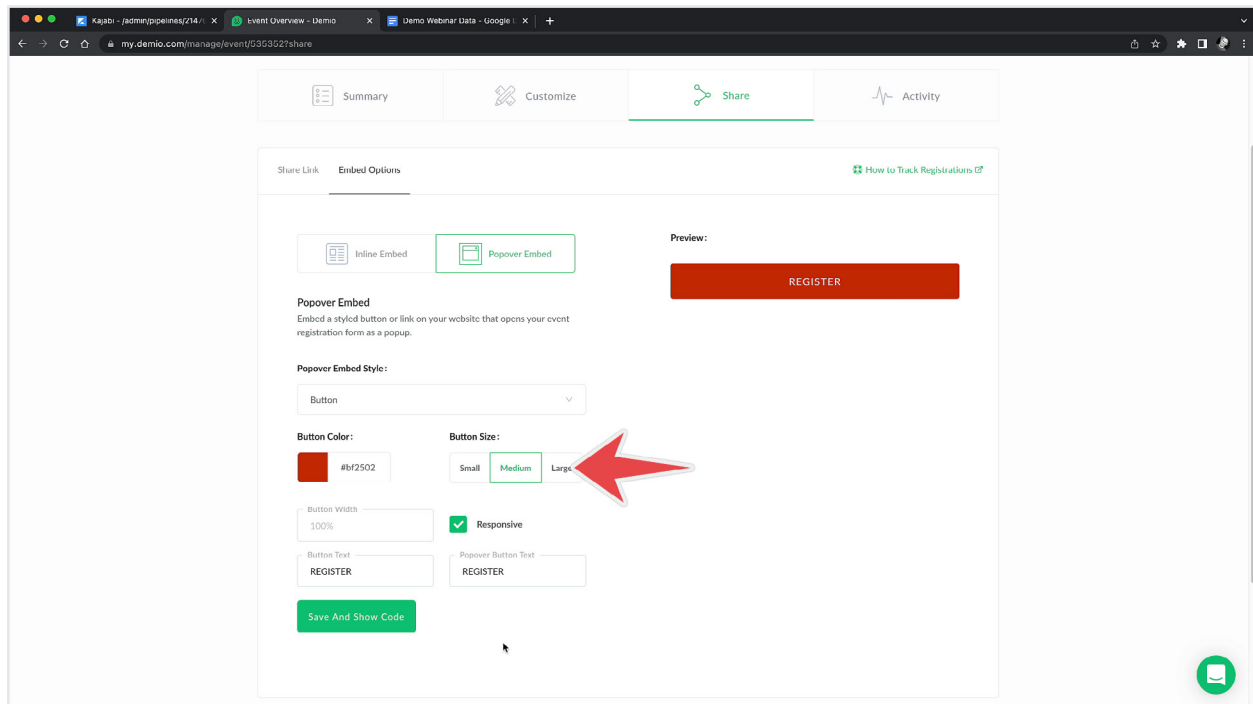
You can customize how this button will appear. First, make sure that **Button** is selected:



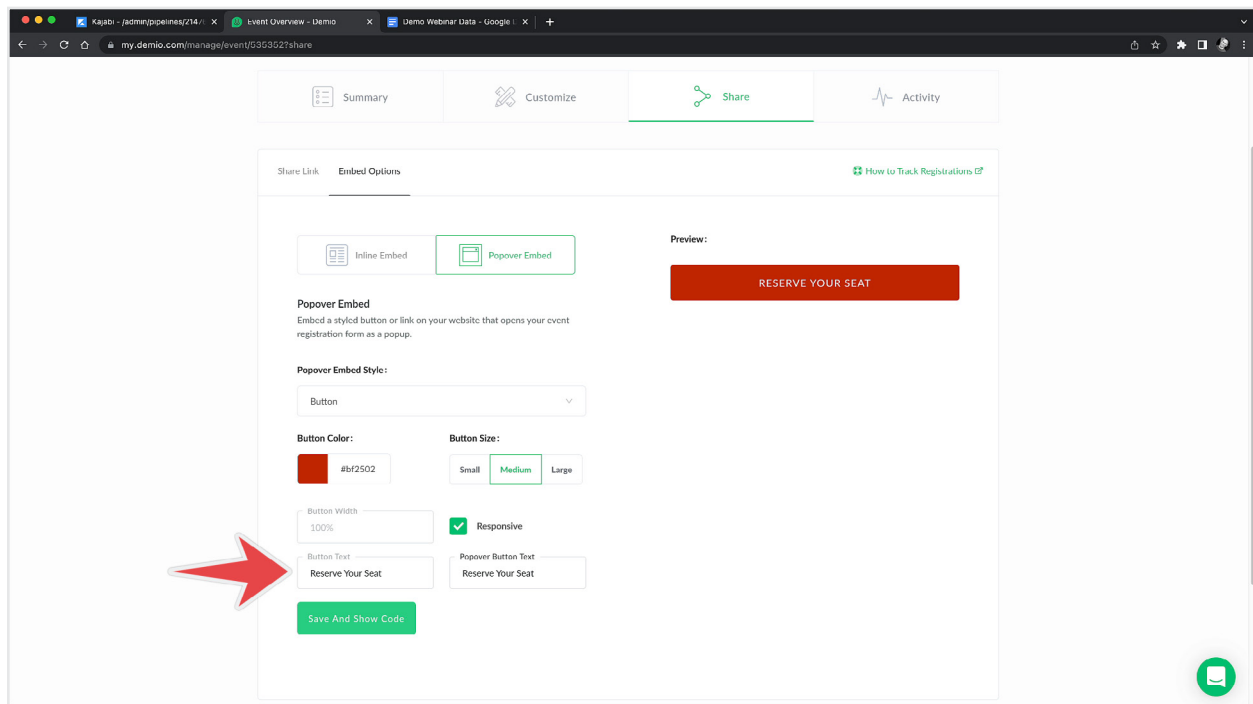
You can change the button color:



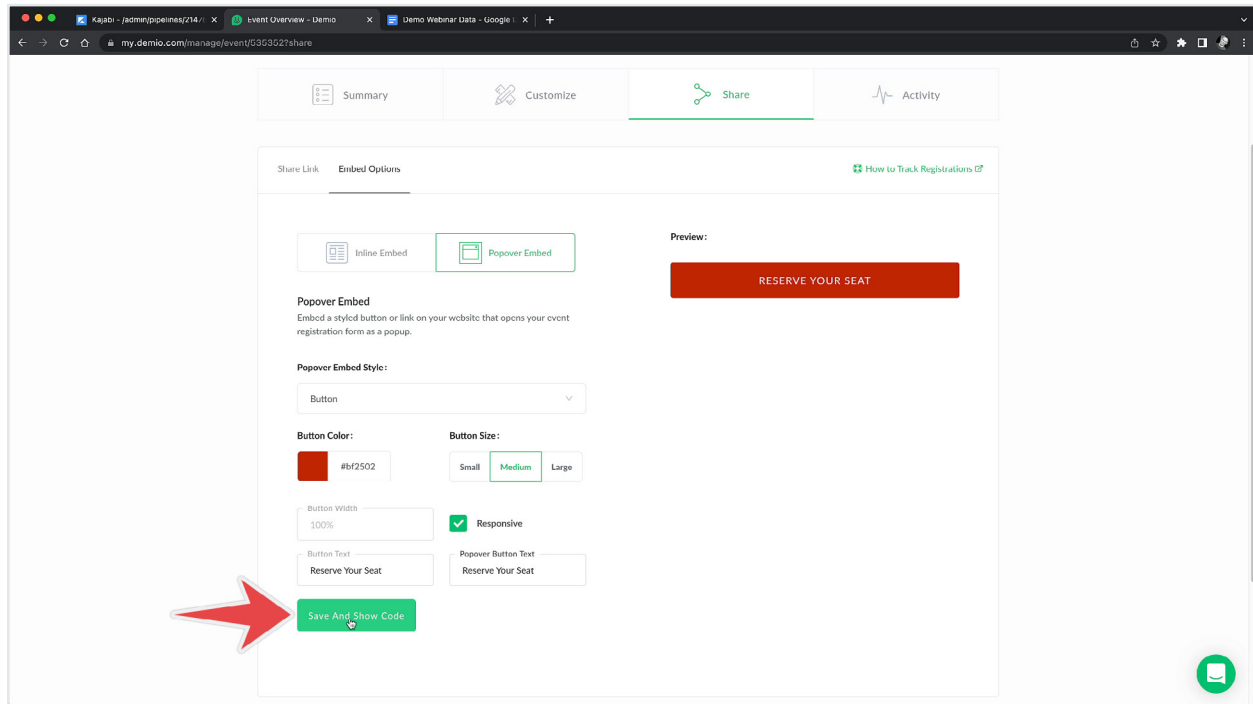
You also have options for the button size:



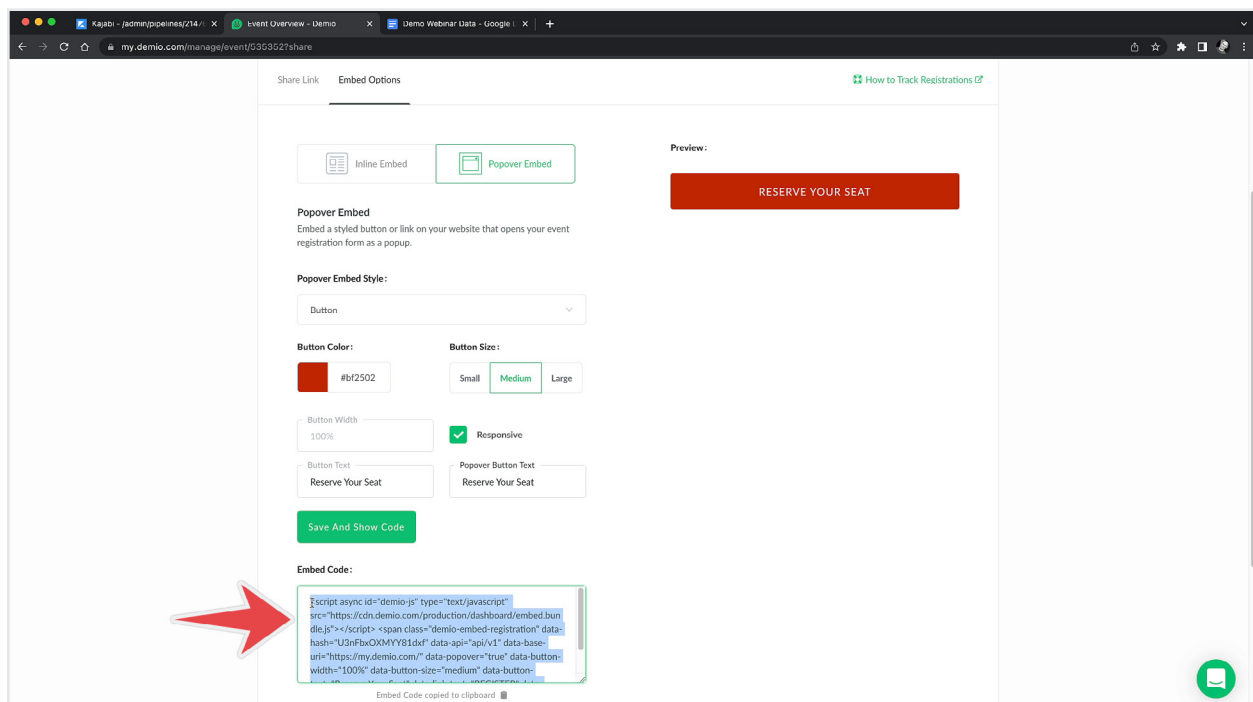
And you can change the text of the button as well:



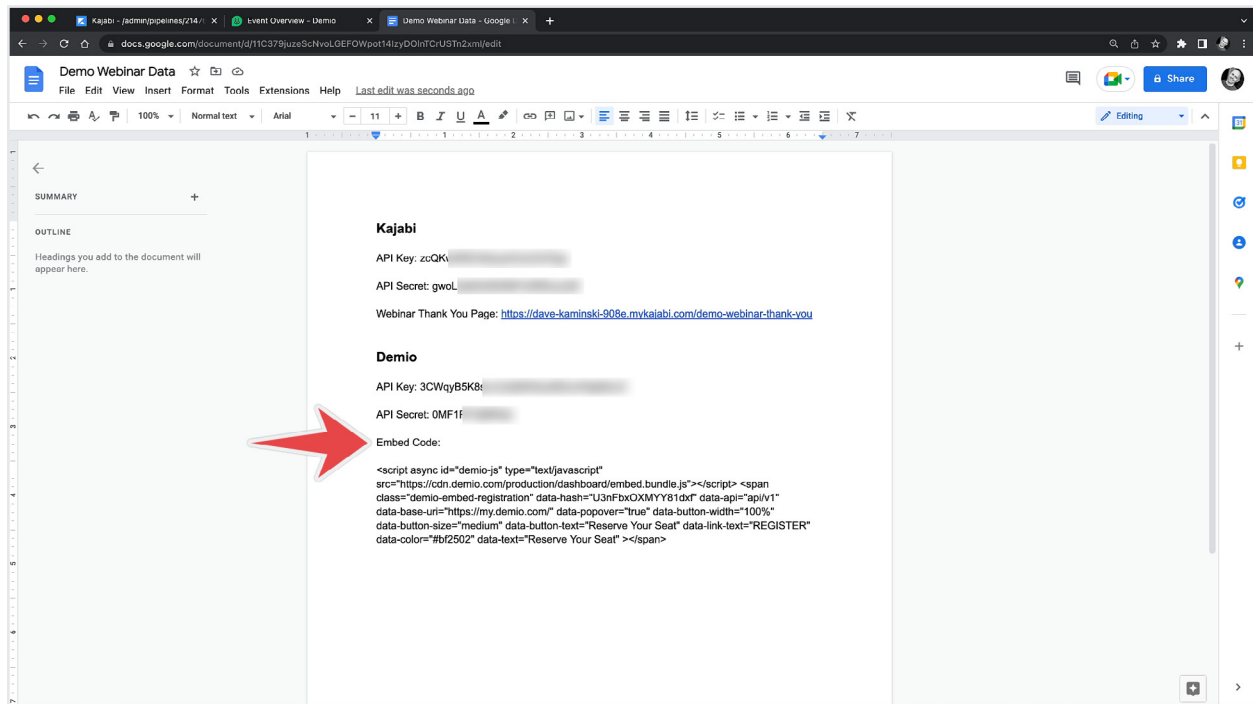
When you're done with any changes, click the button that says **Save and Show Code**:



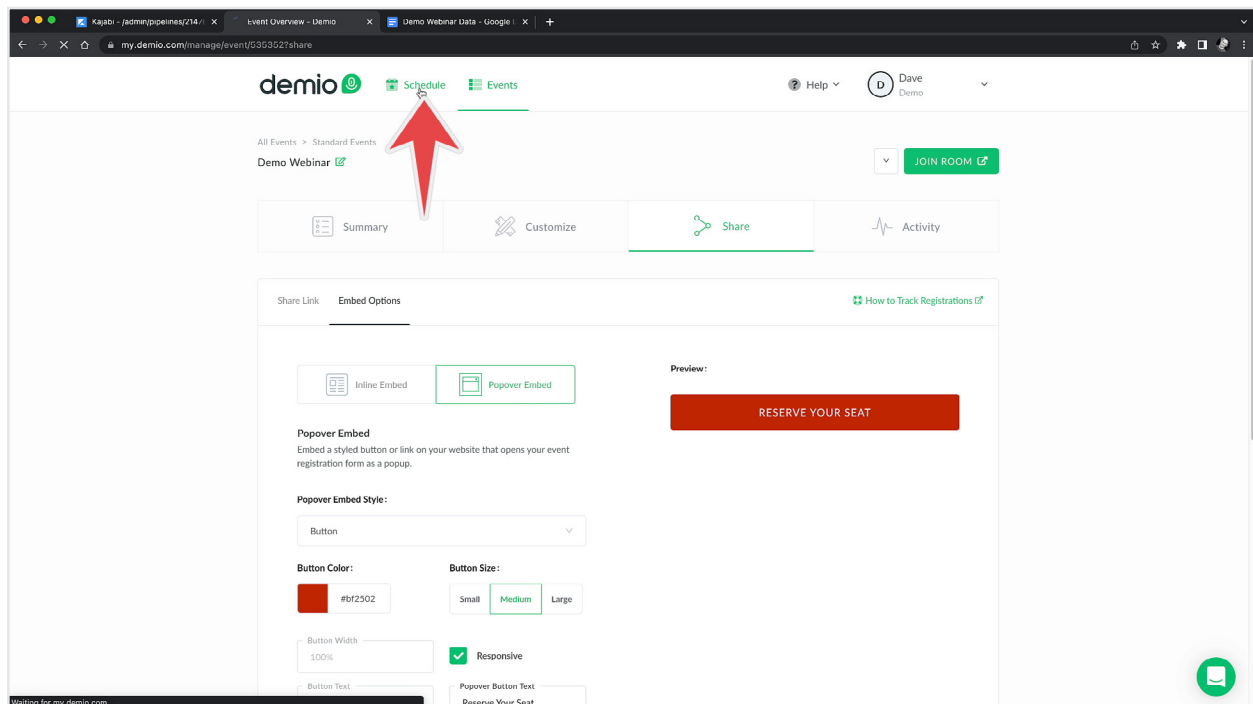
When you do this, a dialog will appear with the embed code for the button. You are going to add this code to your webinar registration page in Kajabi. But first, you need to copy it by clicking on the box:



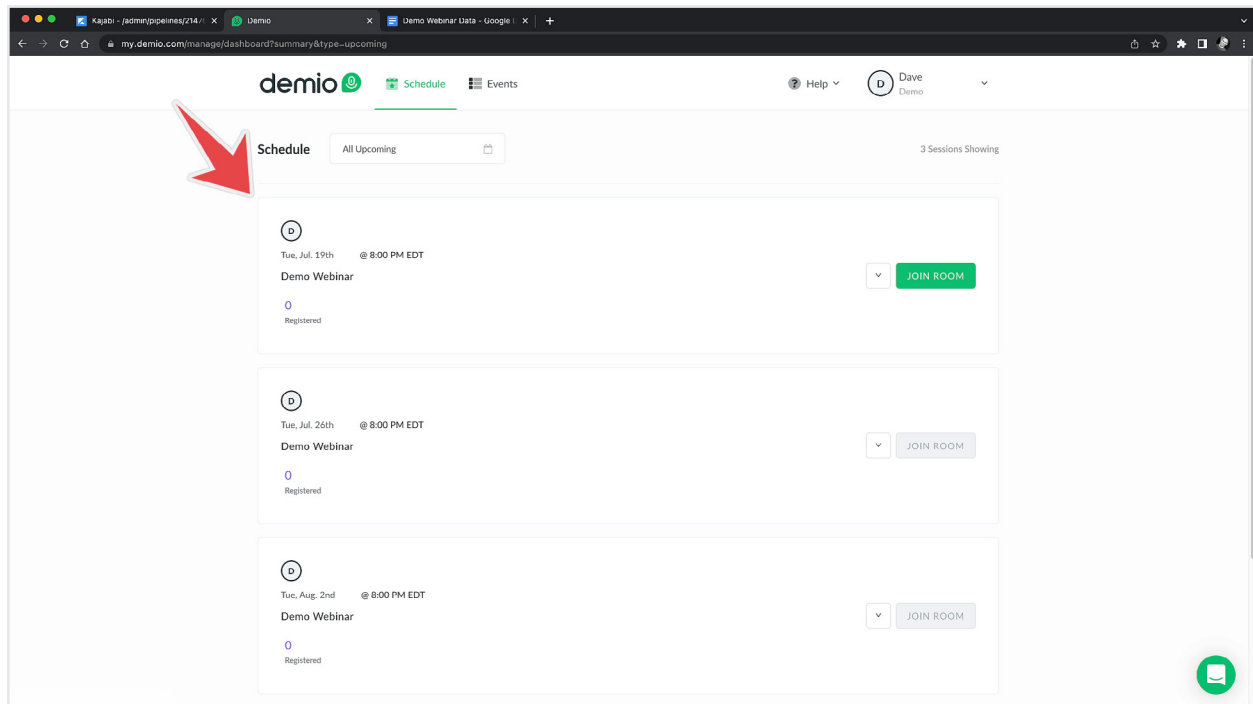
Then go into your Google Doc and paste it:



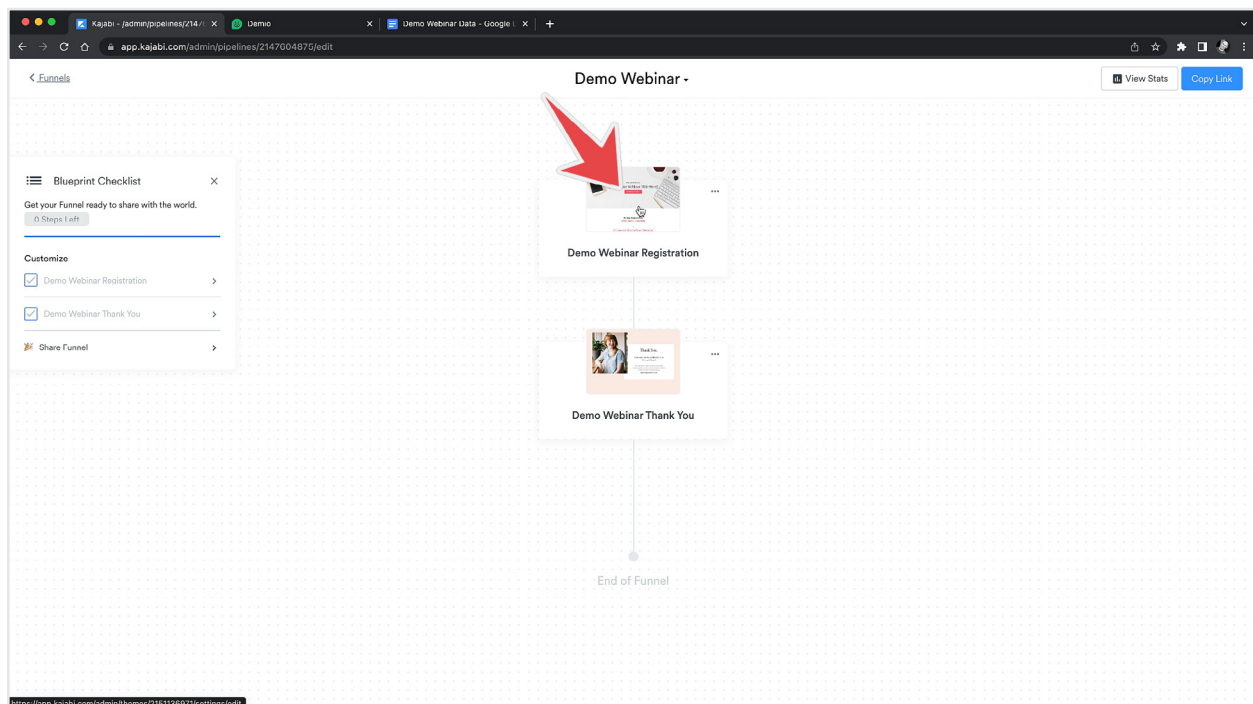
Go back into Demio, scroll up and click on **Schedule**:



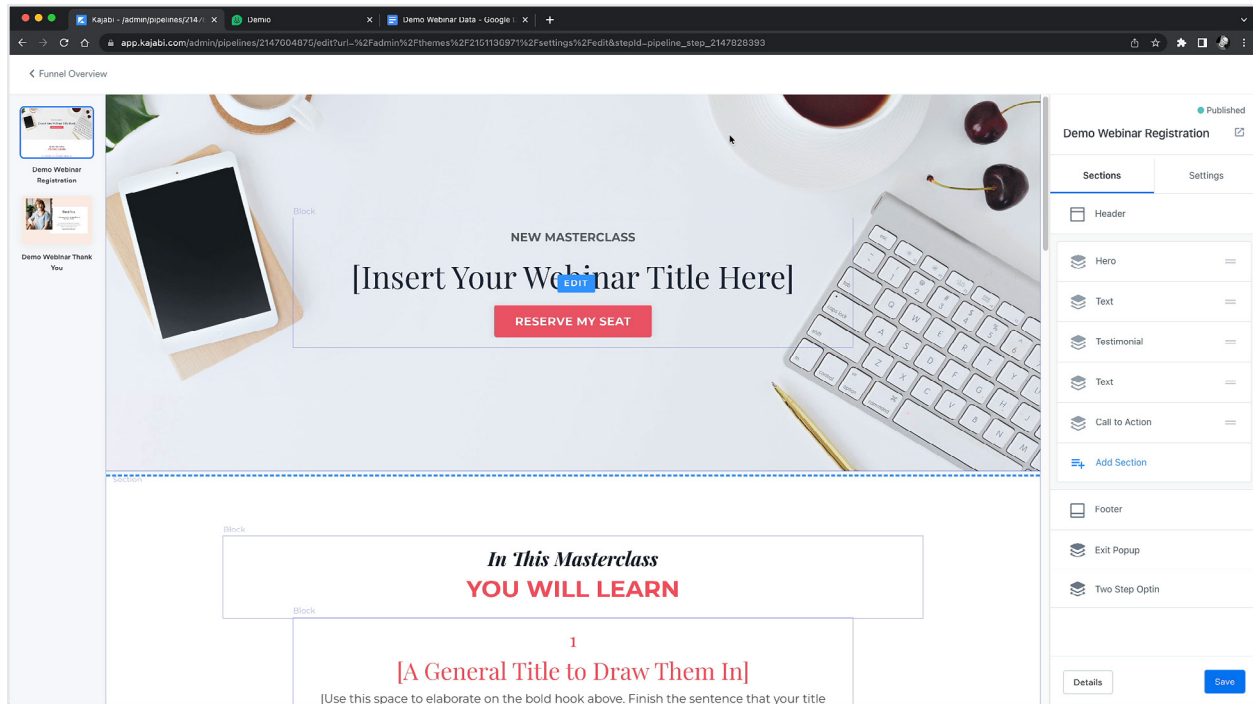
You'll be able to see that all of your webinars are scheduled and ready to go:



That's it for Demio. At least for the moment. Now it's time to go back into Kajabi and begin working on your webinar registration page. To do that, click on the thumbnail image of your webinar registration page:



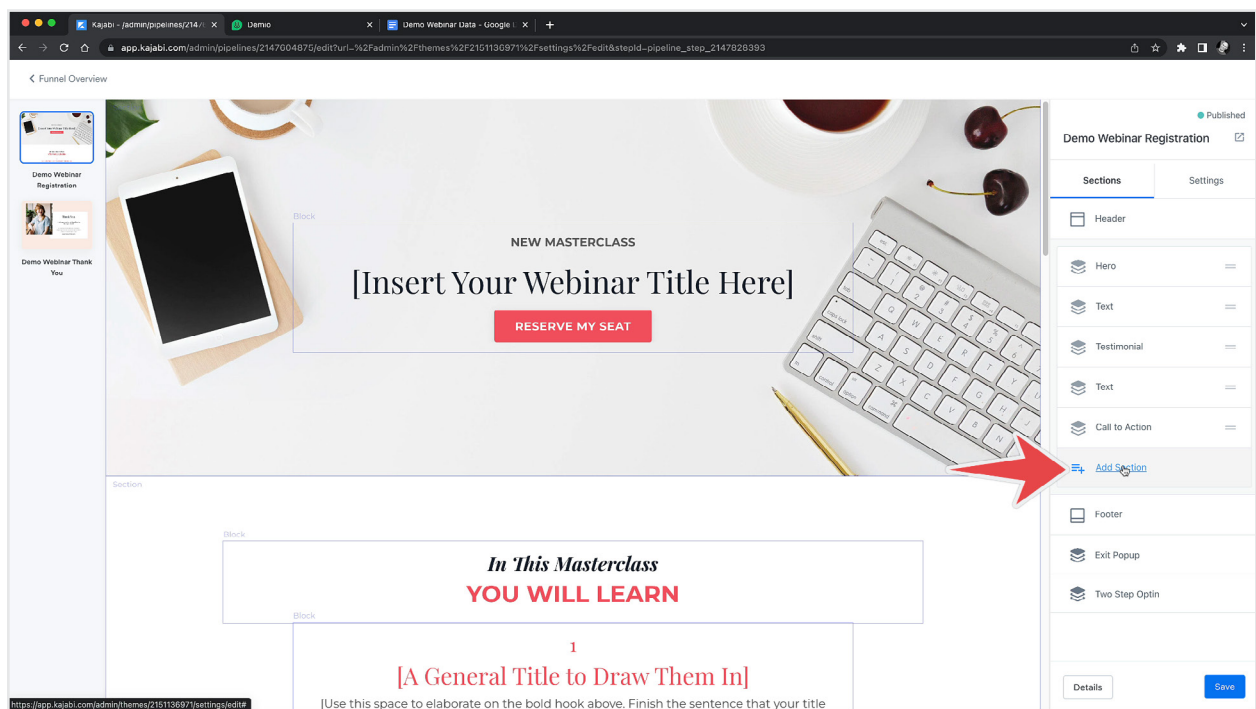
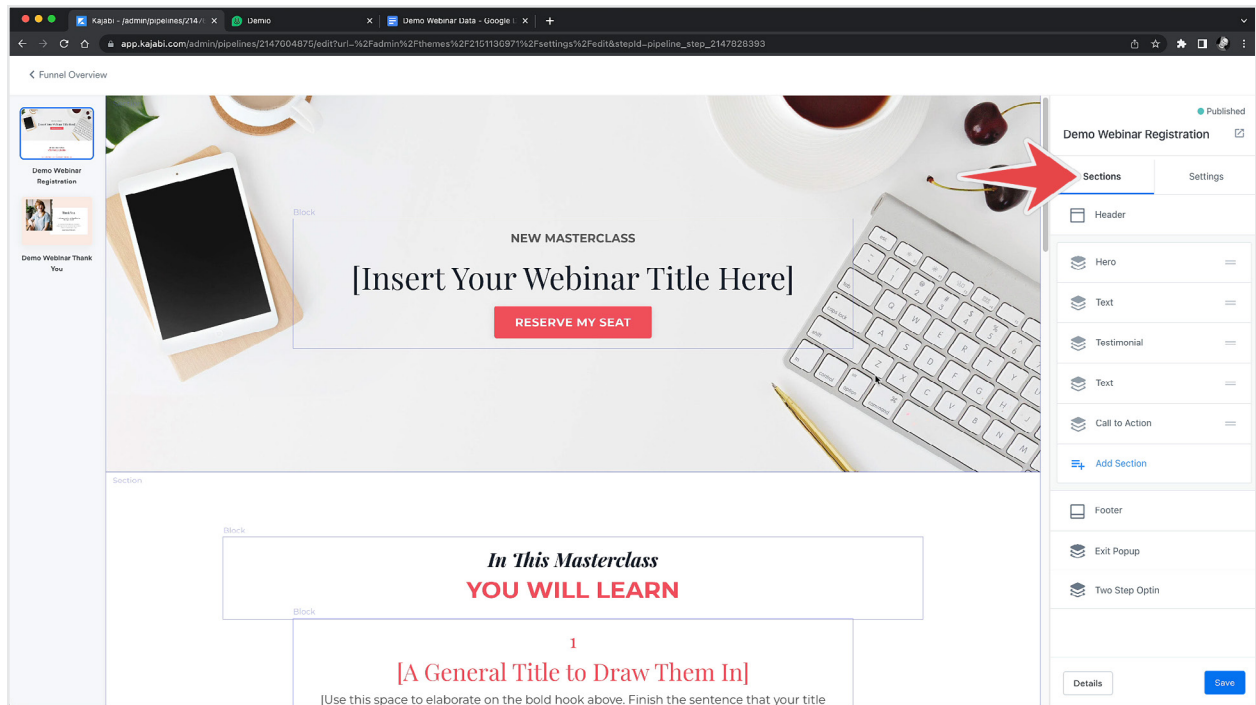
When you do that, the webinar registration page will open in the Kajabi page builder. In this guide, we won't be covering how to use the Kajabi page builder in detail, we'll just be showing you the basics you need to know for editing your webinar related pages:



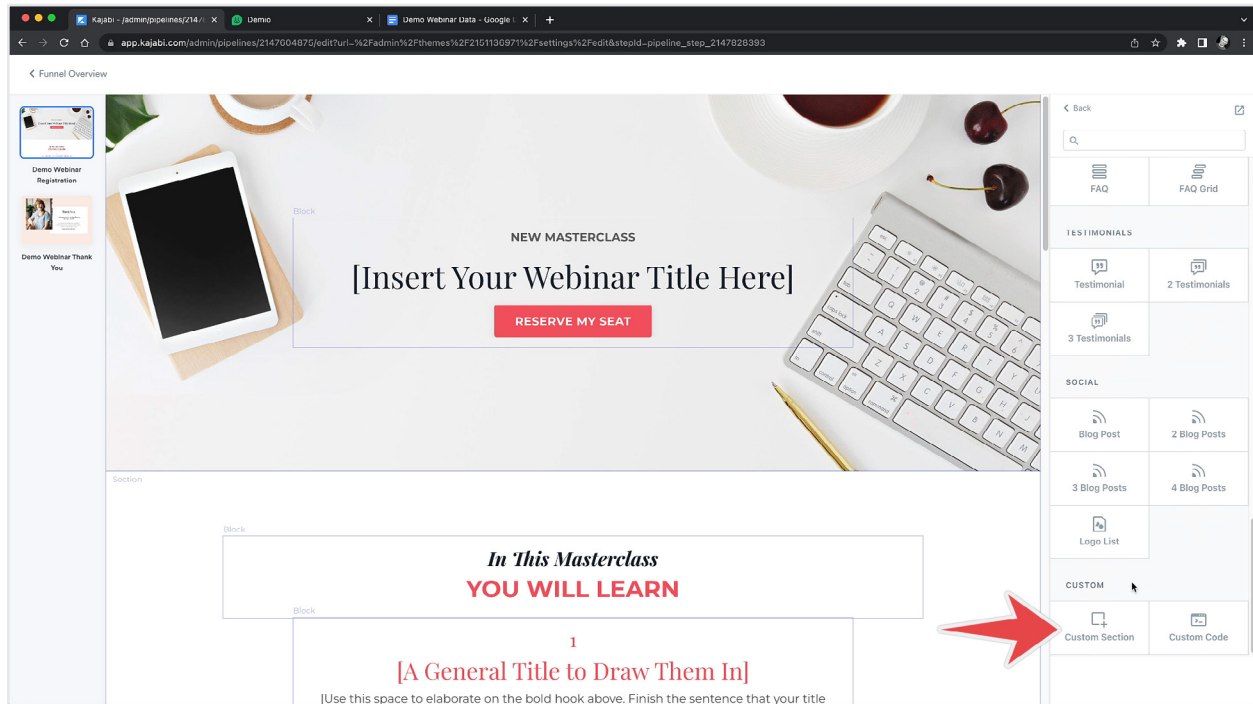
And we're going to run into an issue right away. In the template, there is a button that says **Reserve My Seat**. And when someone clicks that button, you want the popup from Demio with the list of your webinars to appear. To make this happen, you need to paste in the embed code from the Demio (that you stored in your Google Doc earlier).

But the problem is that Kajabi won't let you add the embed code to the **Reserve My Seat** button. So you're going to have to do some extra work to make it happen.

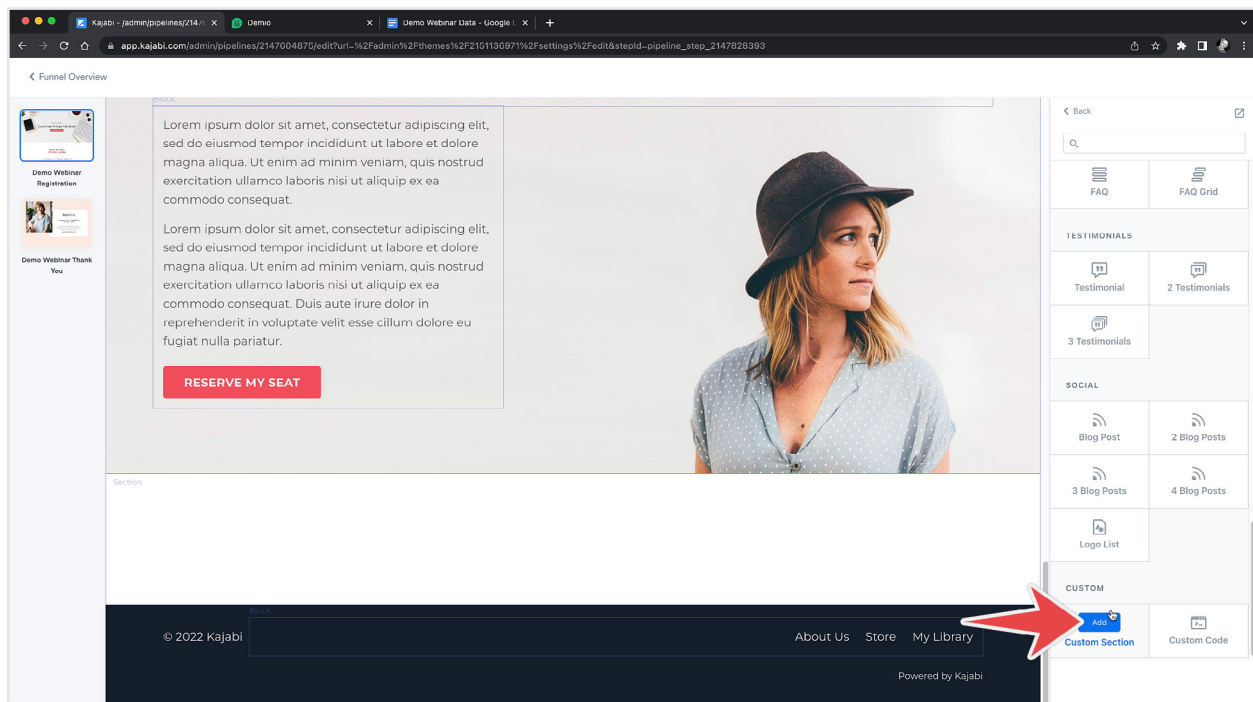
So from the side panel on the right, make sure you're under the Sections tab, then go down and click on **Add Section**:



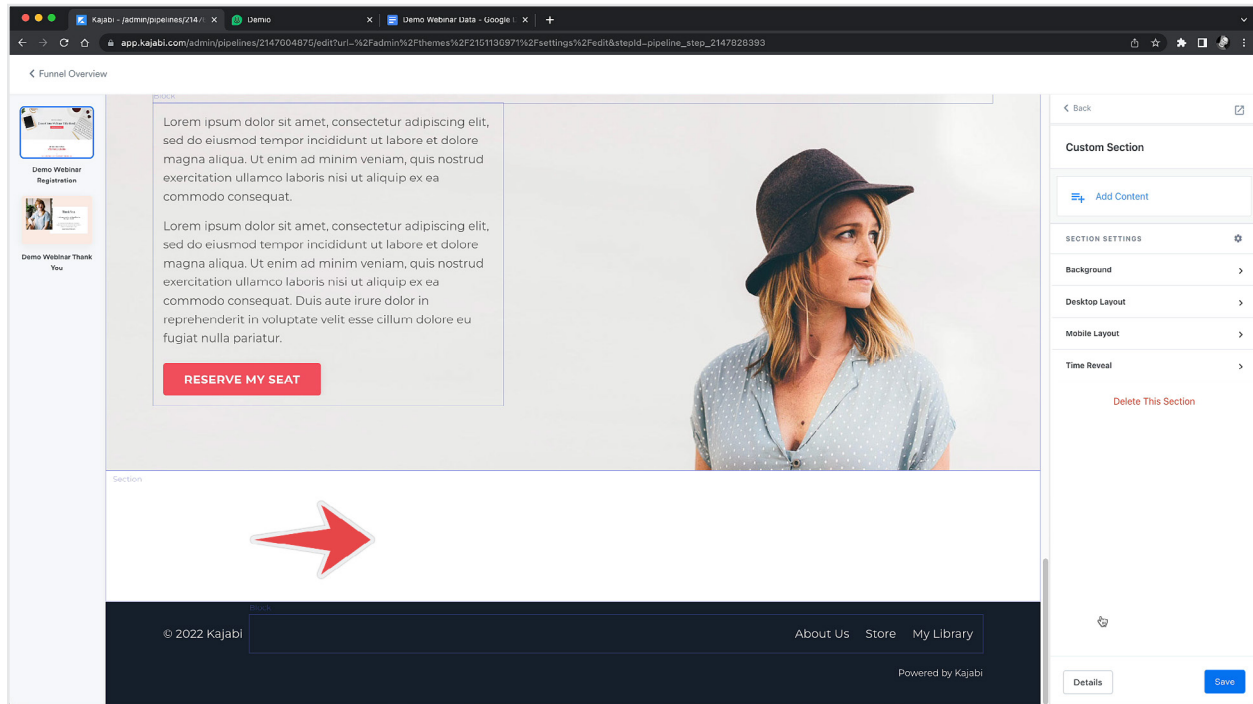
Then scroll all the way down to the bottom of the list that appears and click on **Custom Section**:



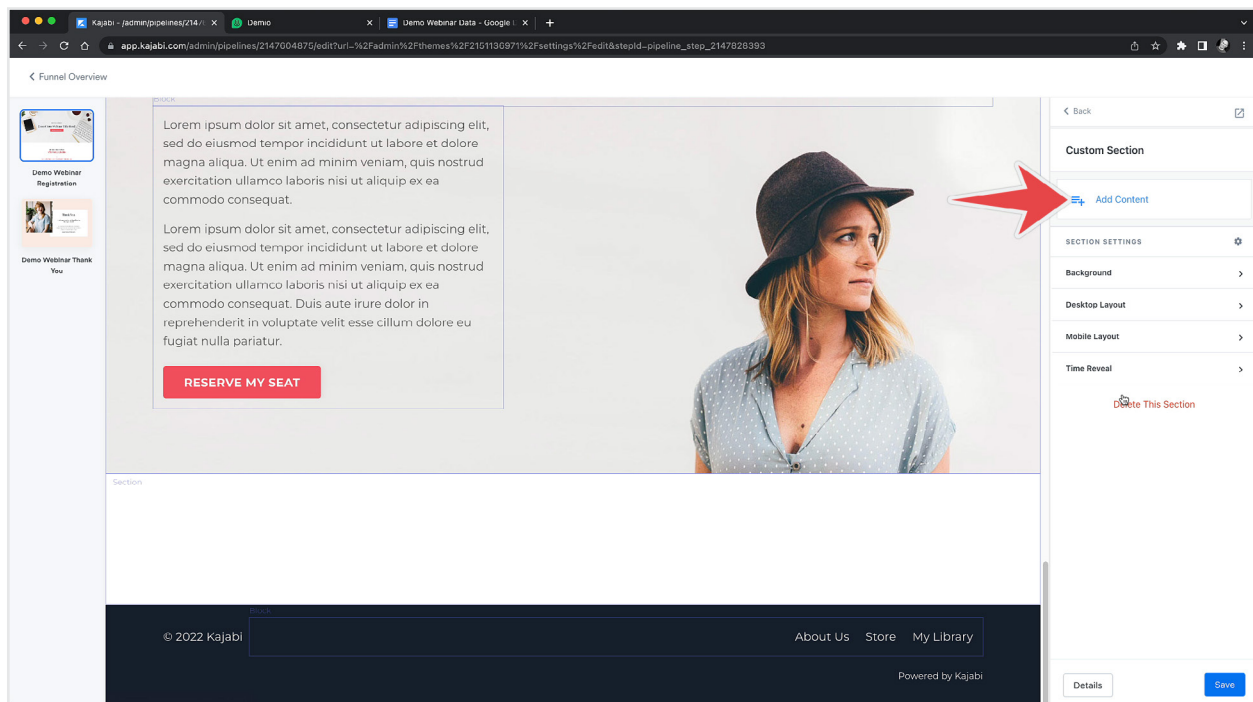
Then click on the **Add** button:



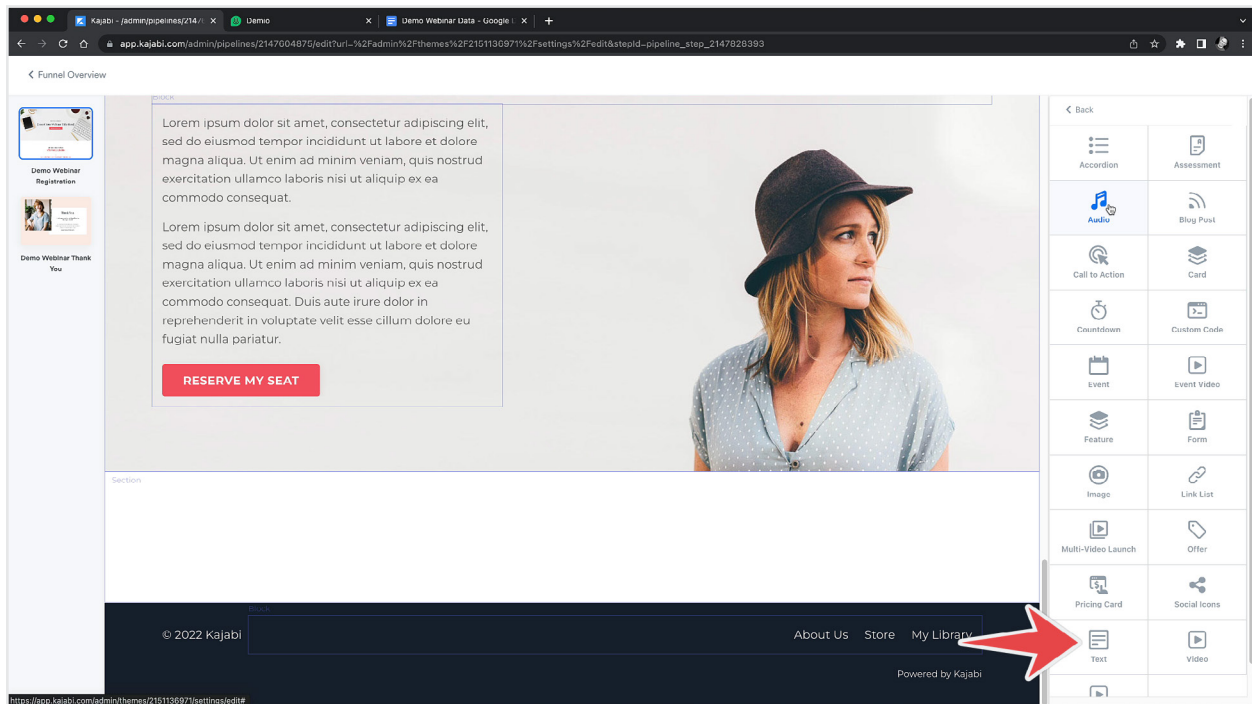
And what this has done is added a new blank section to your webinar registration page:



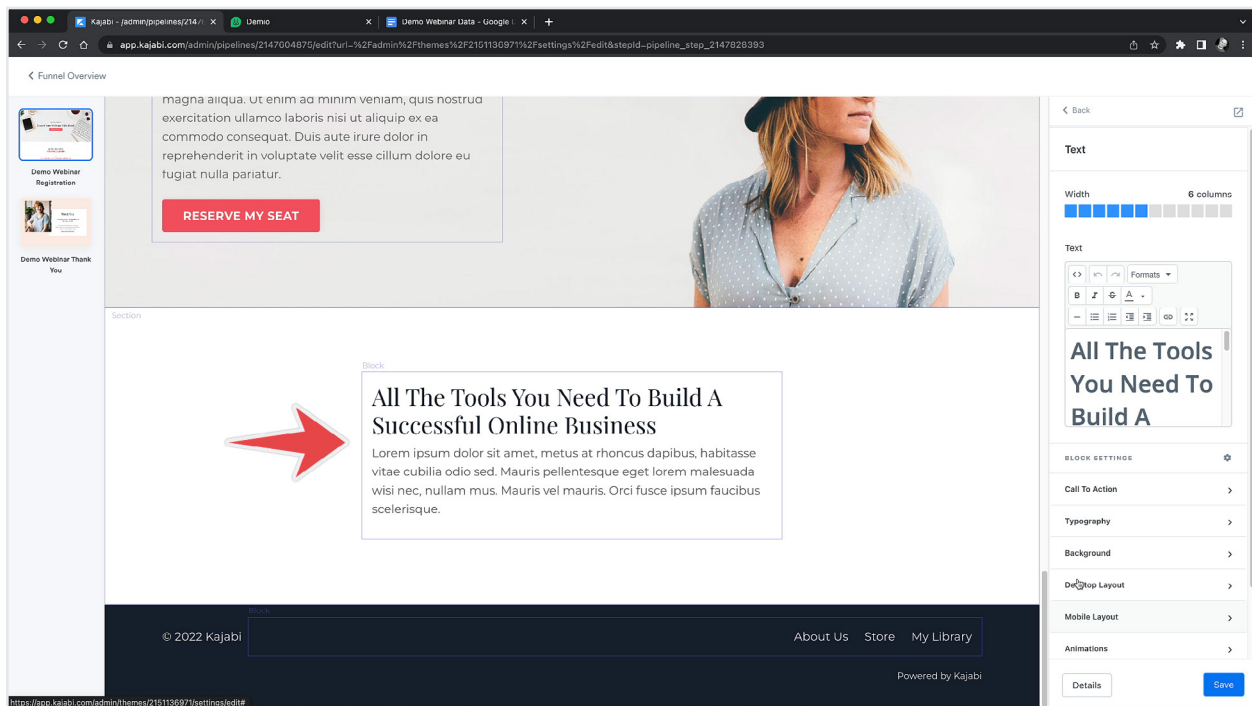
Next, go up and click on **Add Content**:



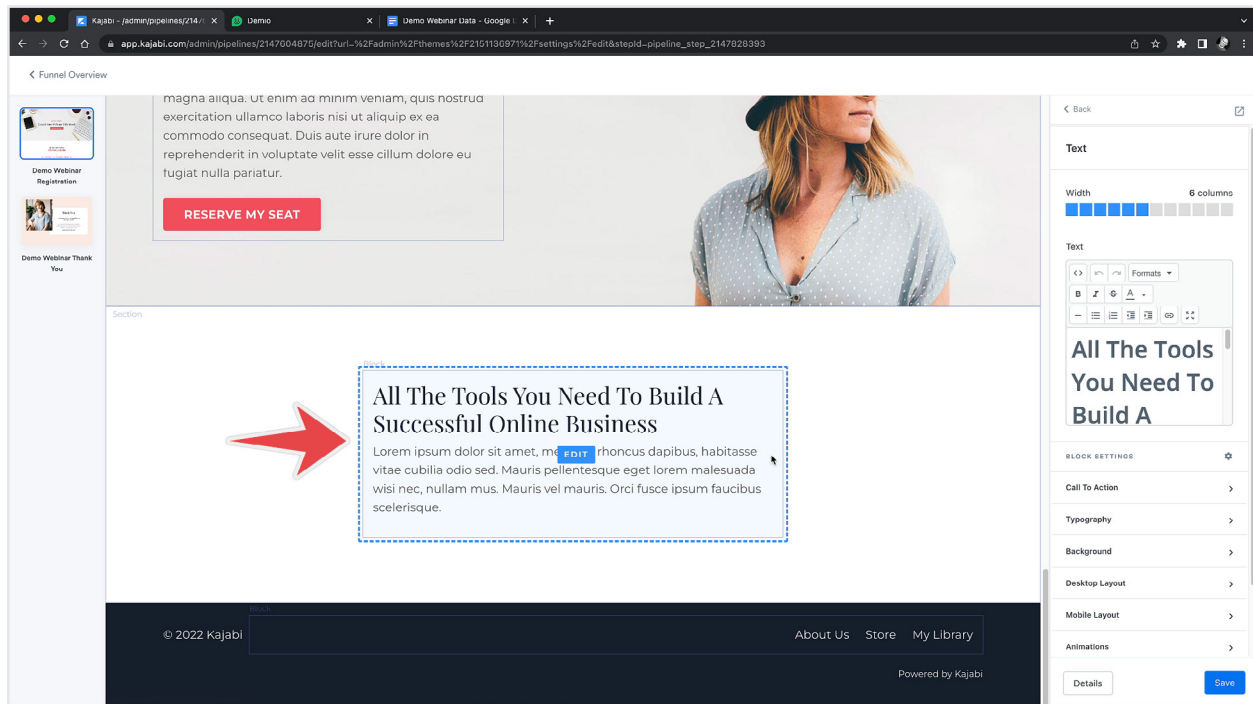
And then go down and click on **Text**:



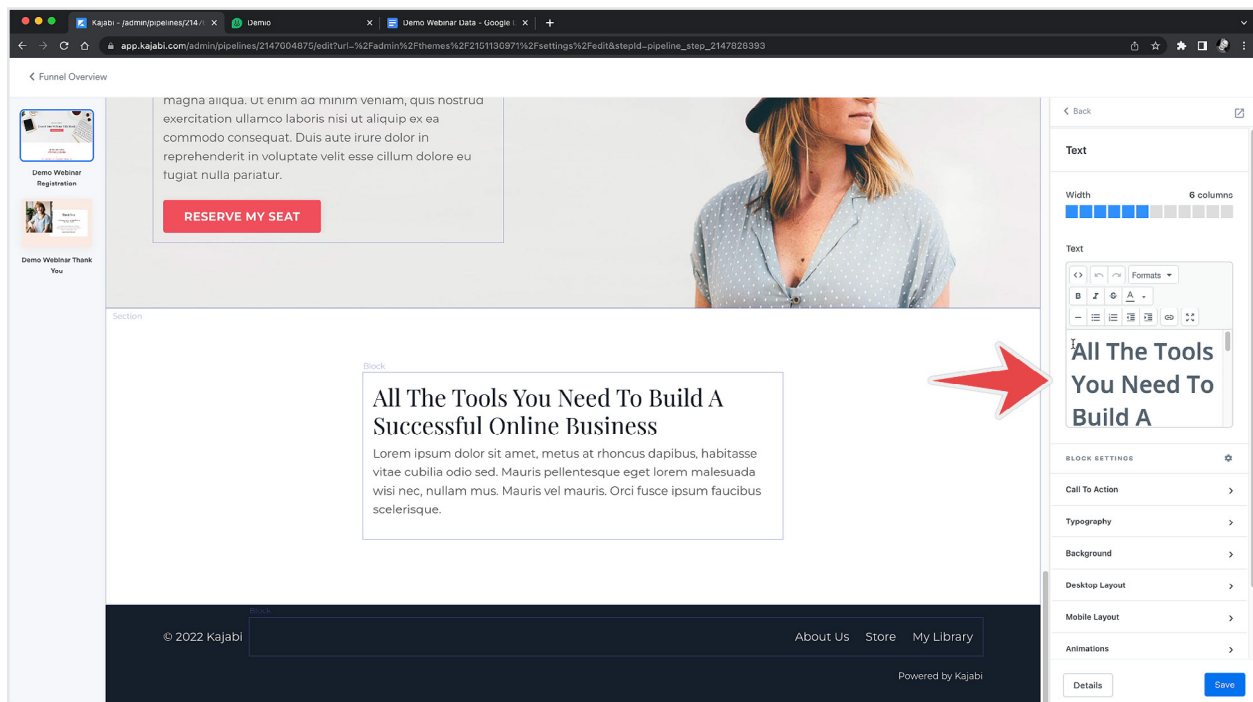
When you do that, you will see a text dialogue appear:



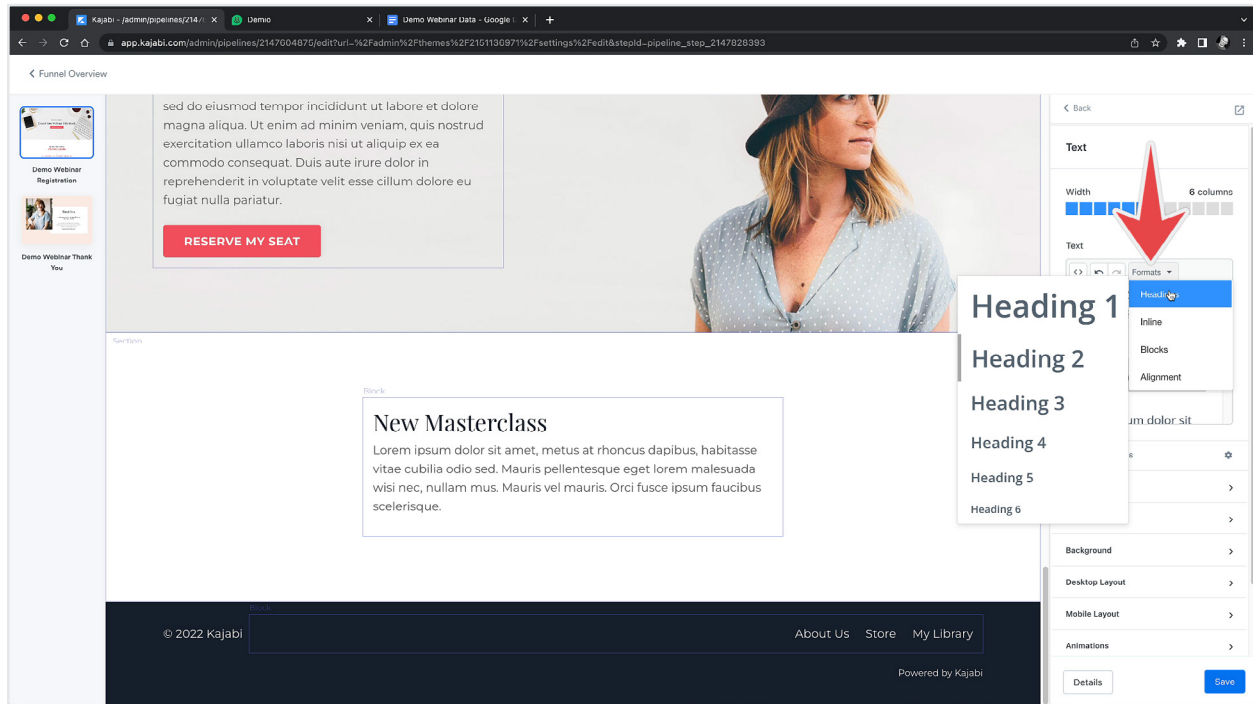
To edit this text, first click on **Edit**:



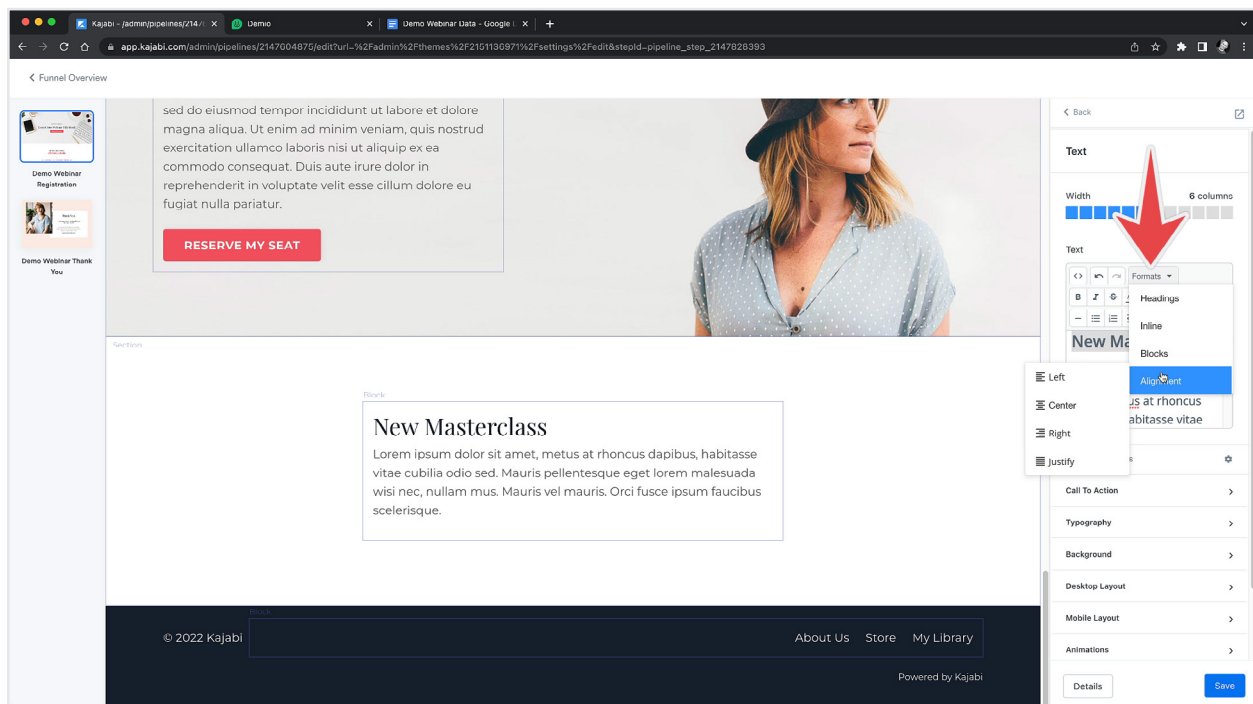
Then go over into the sidebar on the right and edit the text in the dialog that appears:



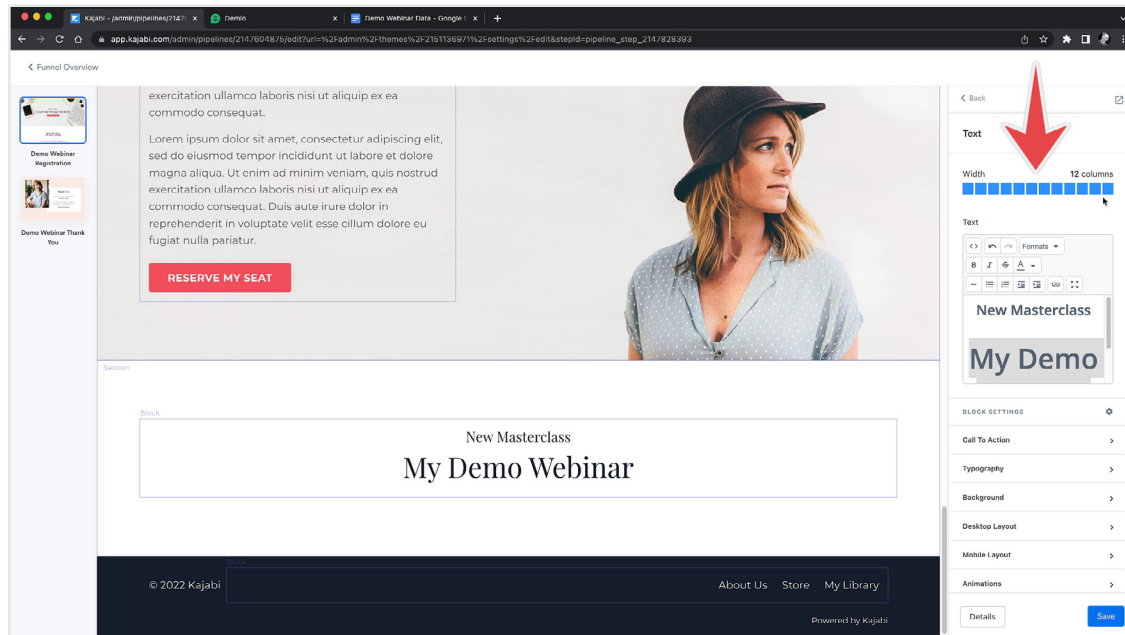
You can adjust the size of the text by highlighting the text, click on **Formats** and **Headings**:



You can align the text by clicking on **Formats** and **Alignment**. In this example, I center my text:

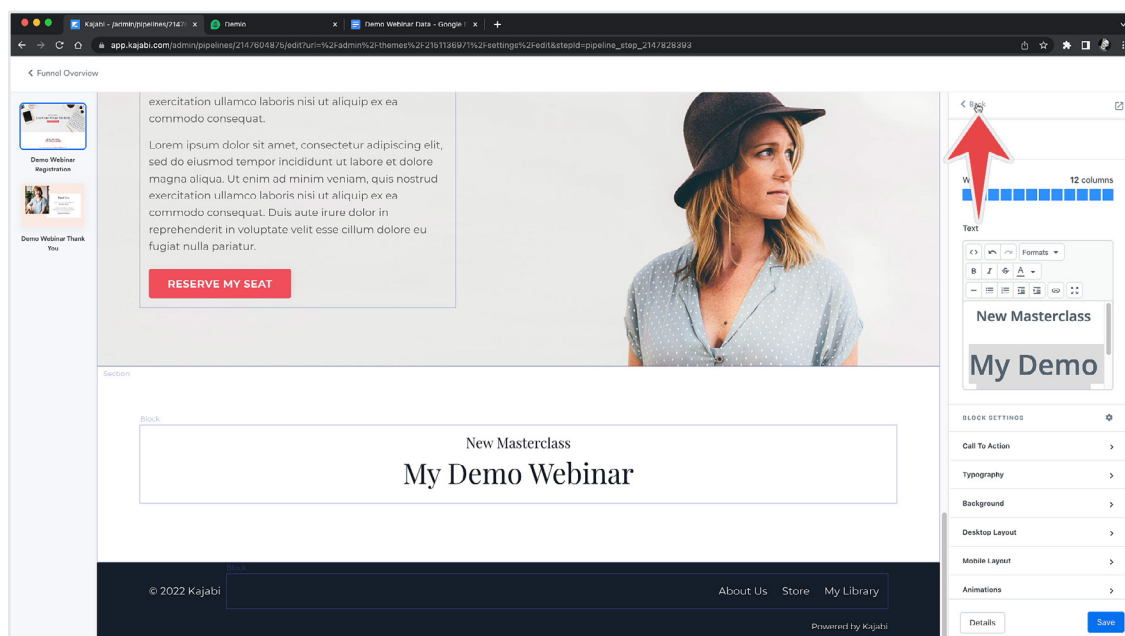


Once you have your text appearing the way you like, go up to the **Width** bars and change the width to 12 columns. This will ensure that your text will not have any other elements on the page appearing to the left or right of it:

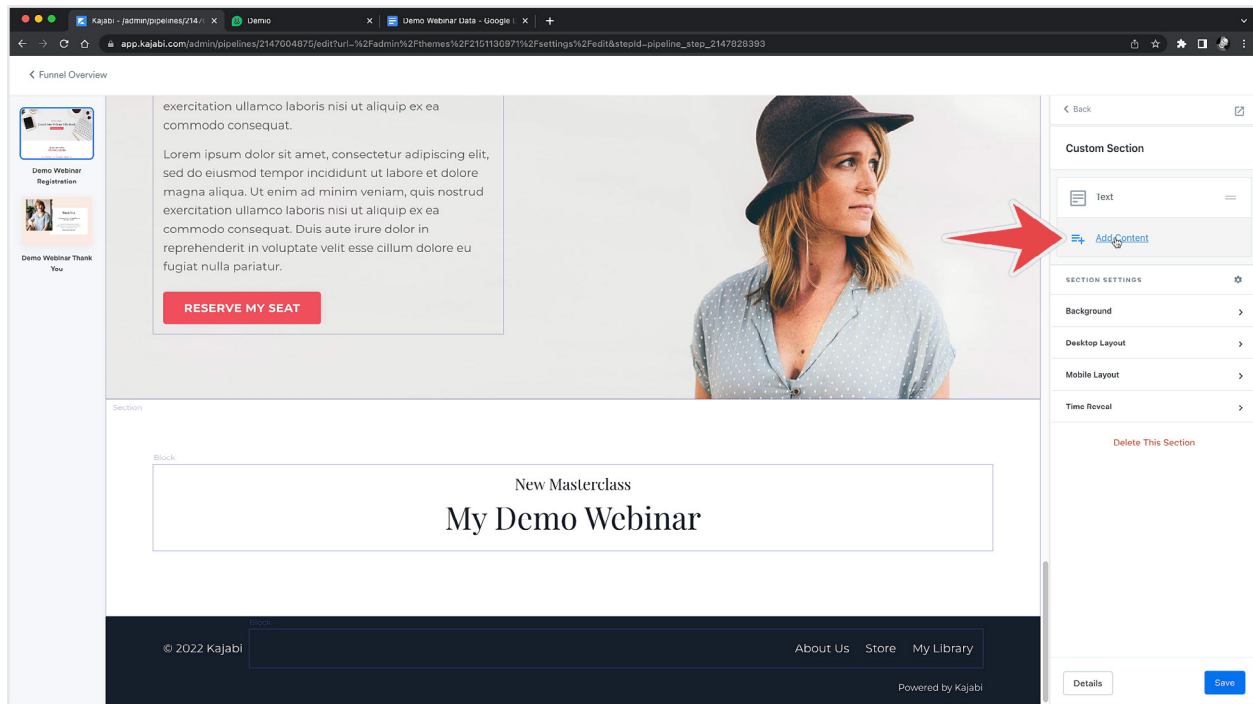


Now it's time to add the embed code from Demio. When we do this, a button will appear on the page and when someone clicks the button, a popup will appear with your list of webinars.

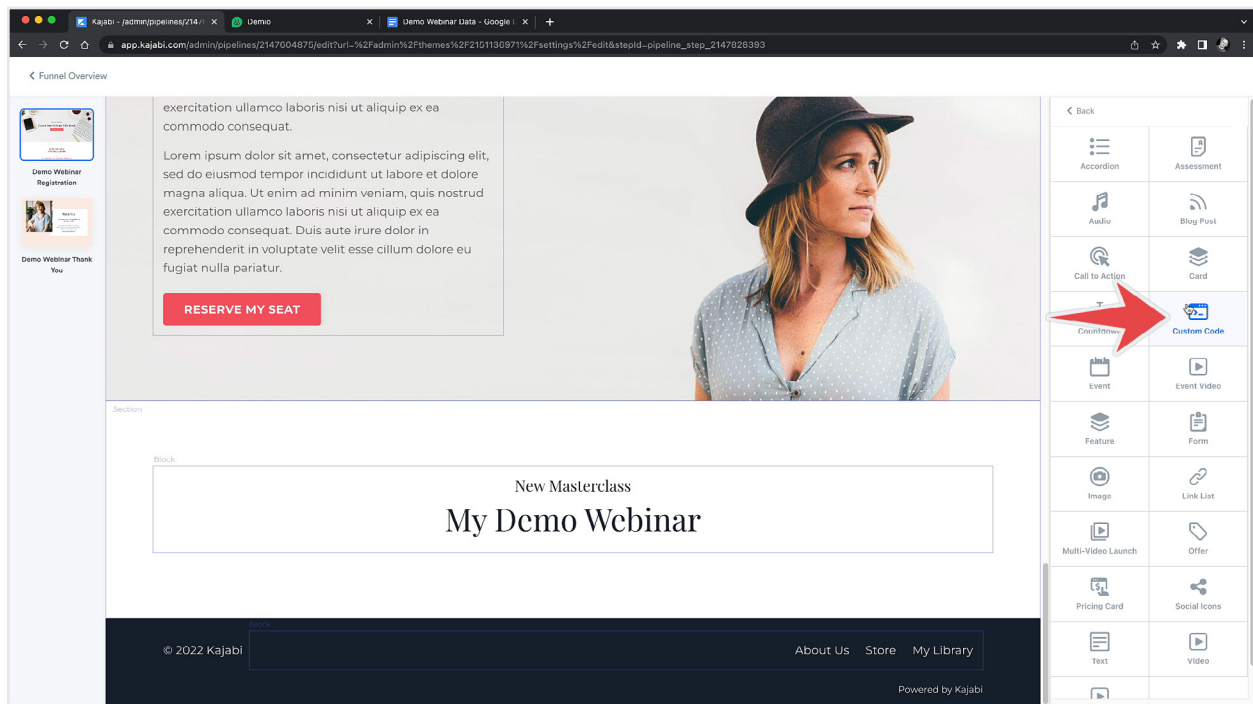
You want this button to appear below the text you just added. To make that happen, first click on the **Back** link:



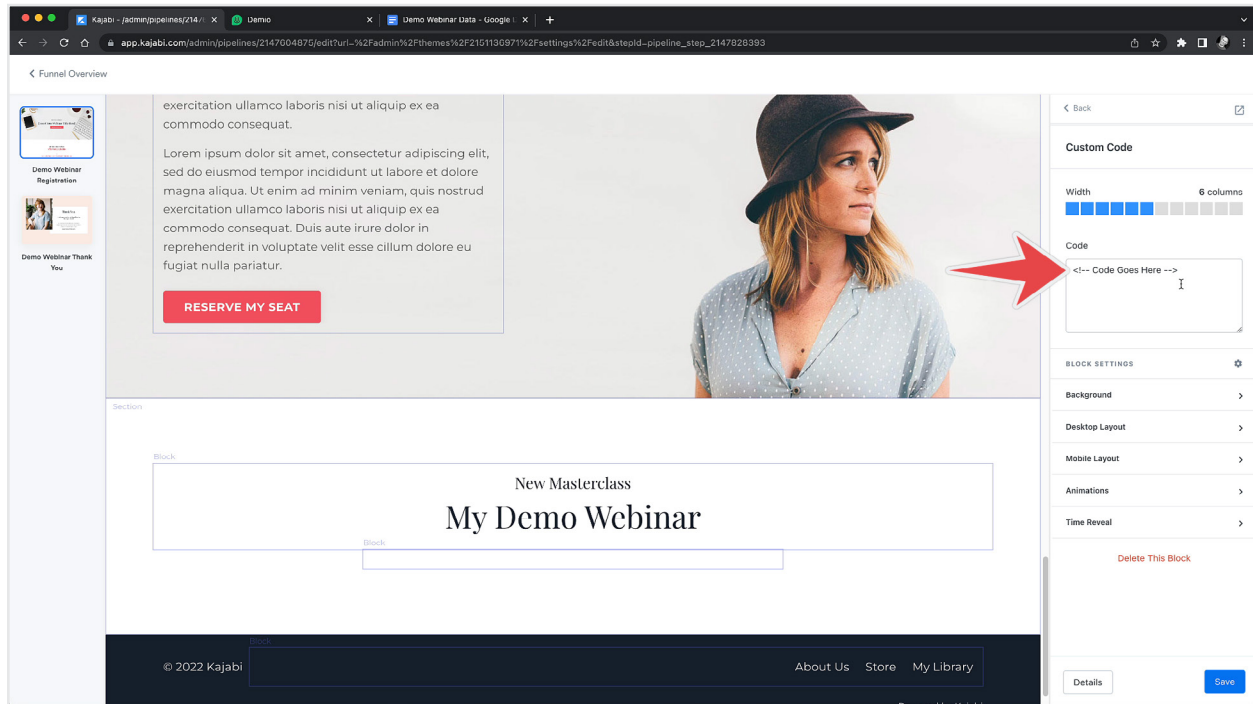
Then click on **Add Content**:



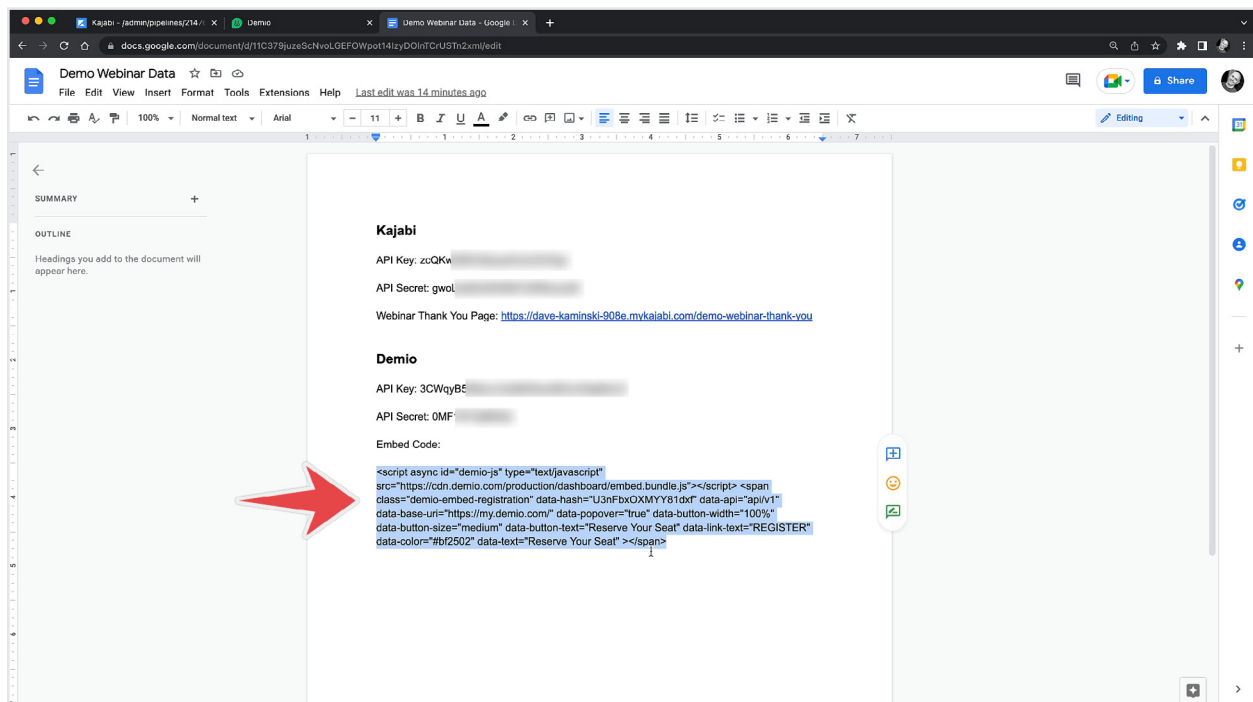
Then click on **Custom Code**:



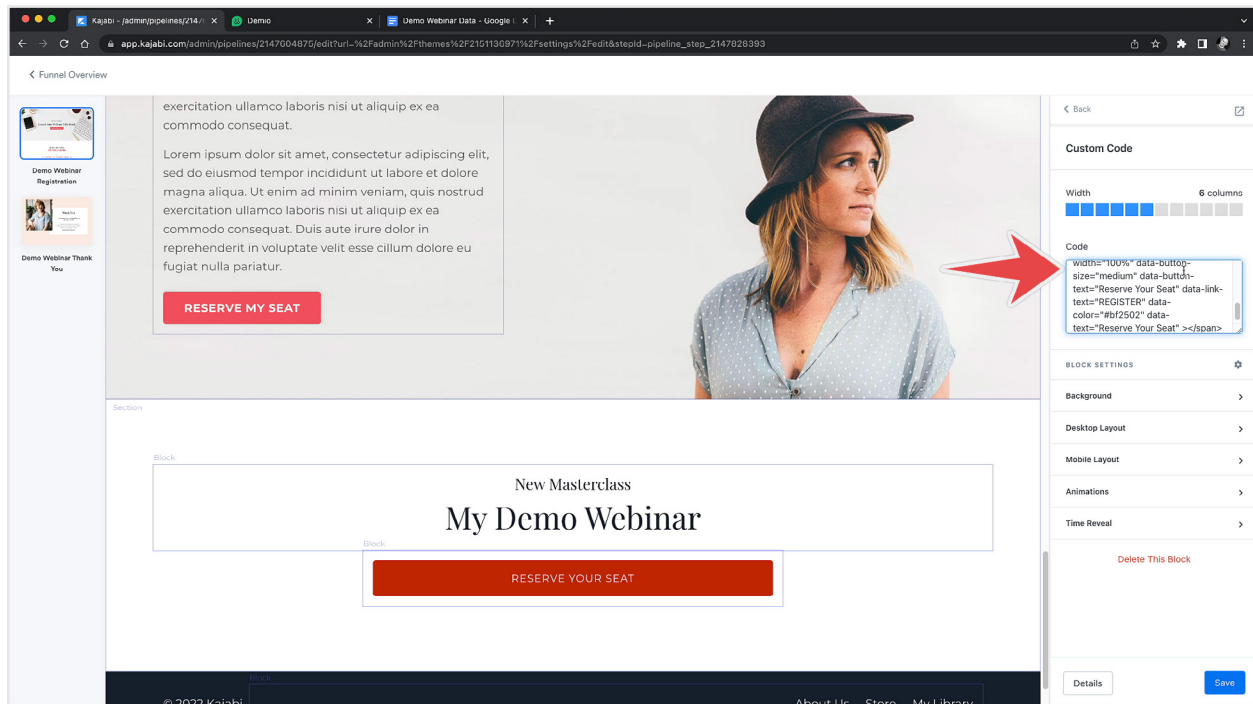
You'll see a dialog appear for code. This is where you want to add your embed code from Demio:



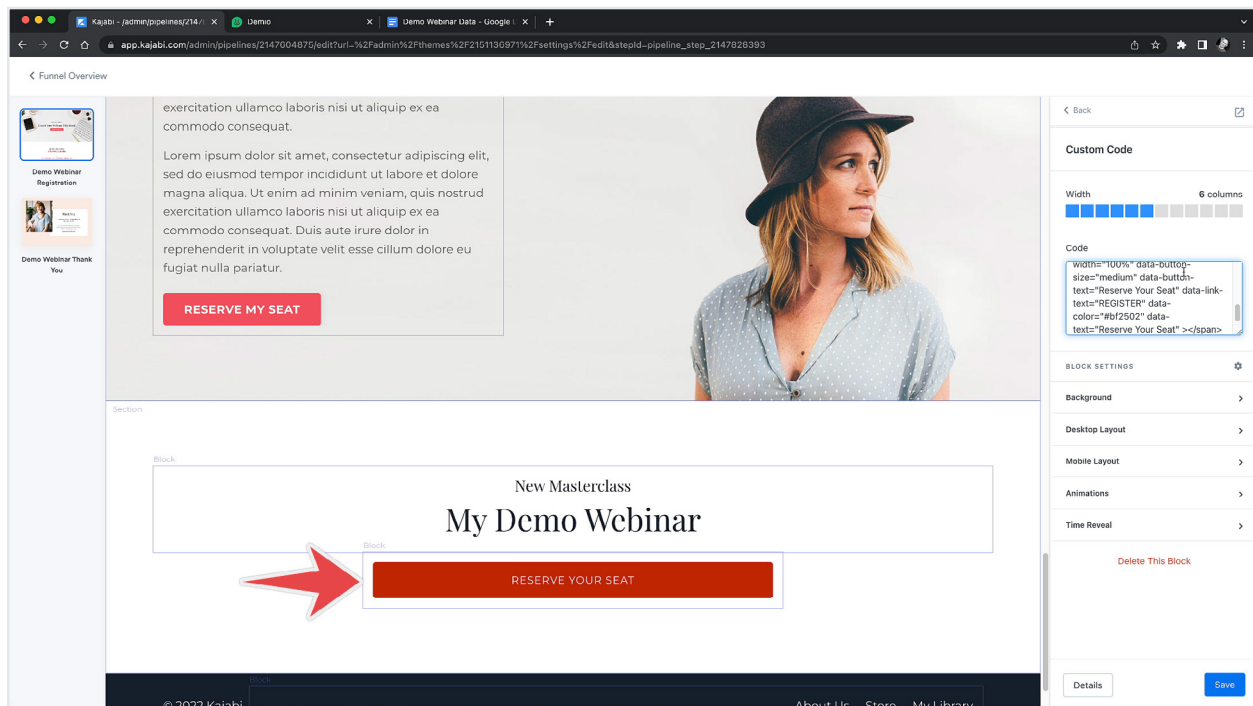
Go to your Google Doc and copy the Demio embed code:



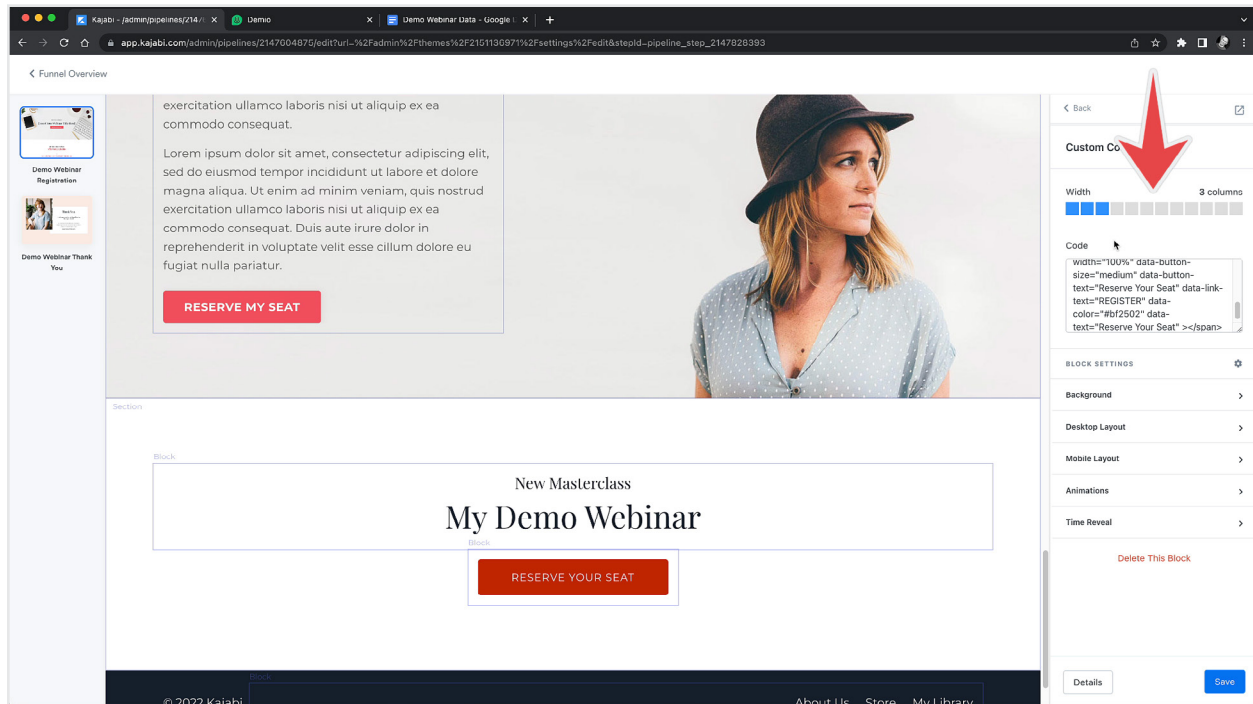
And then paste it into the code dialog in Kajabi:



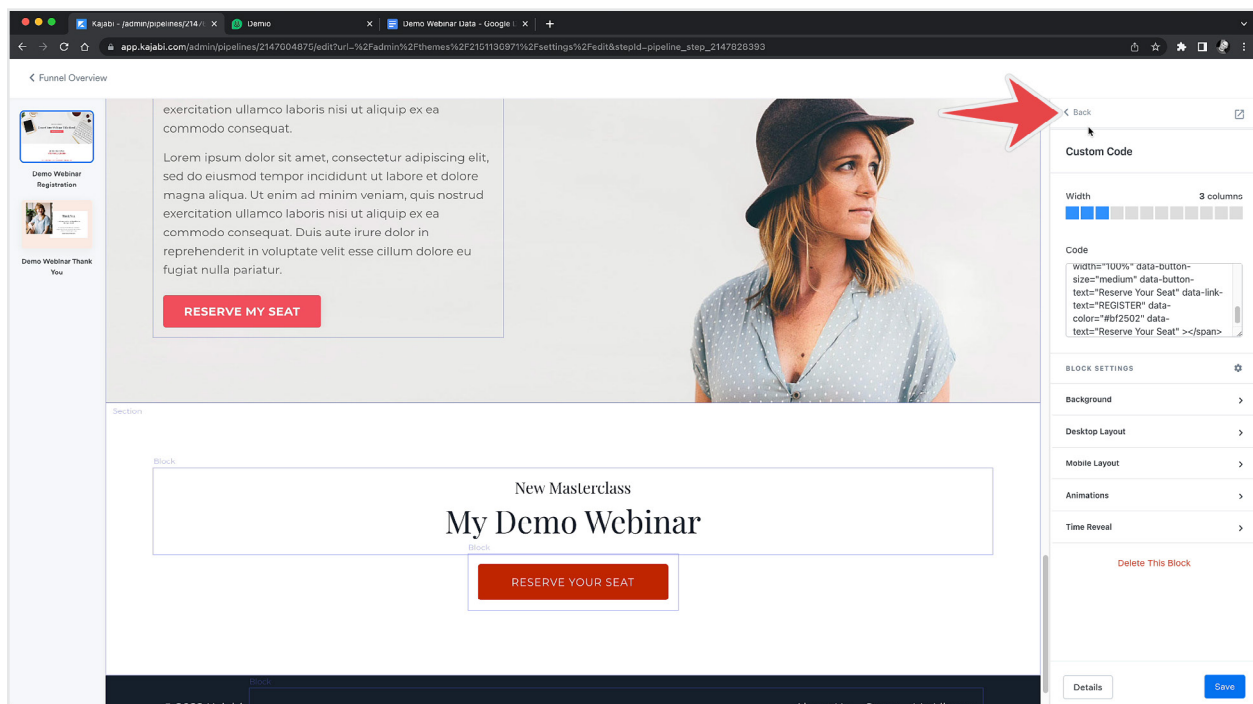
When you do that, you'll see your webinar registration button appear:



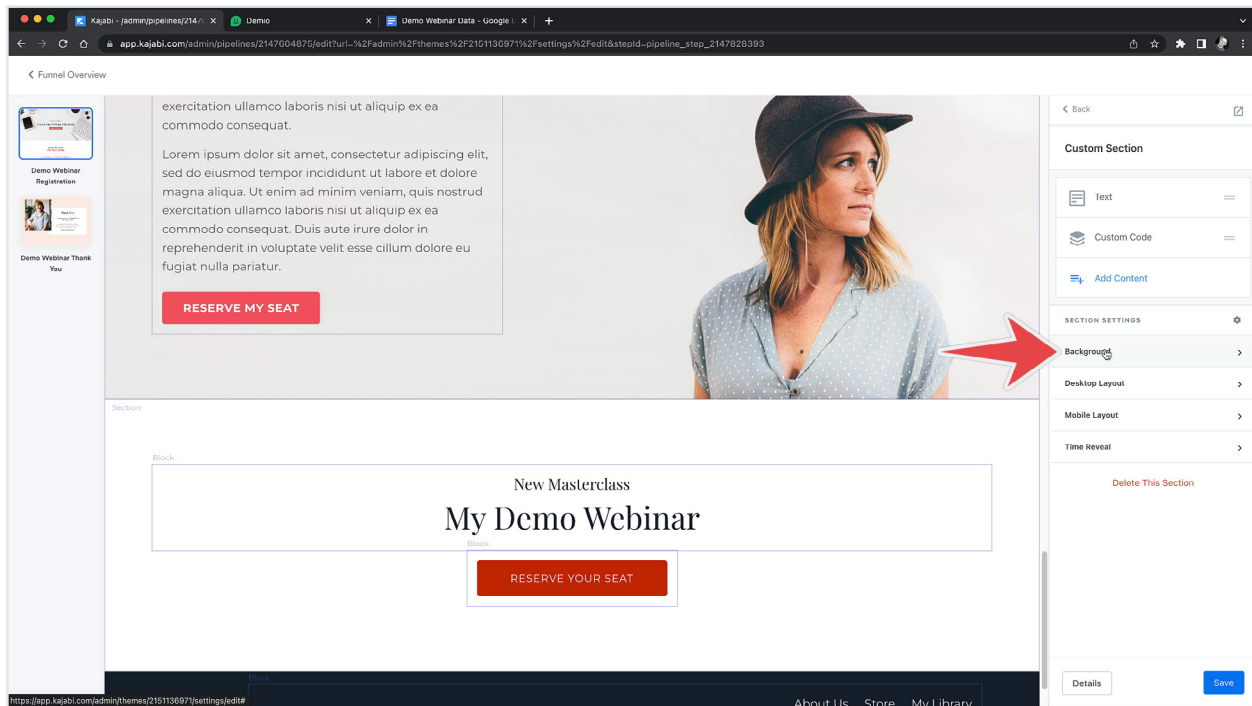
You can adjust the width of the button by going to **Width** in the side panel on the right and selecting a new number of columns. For example, I changed my column width to 3:



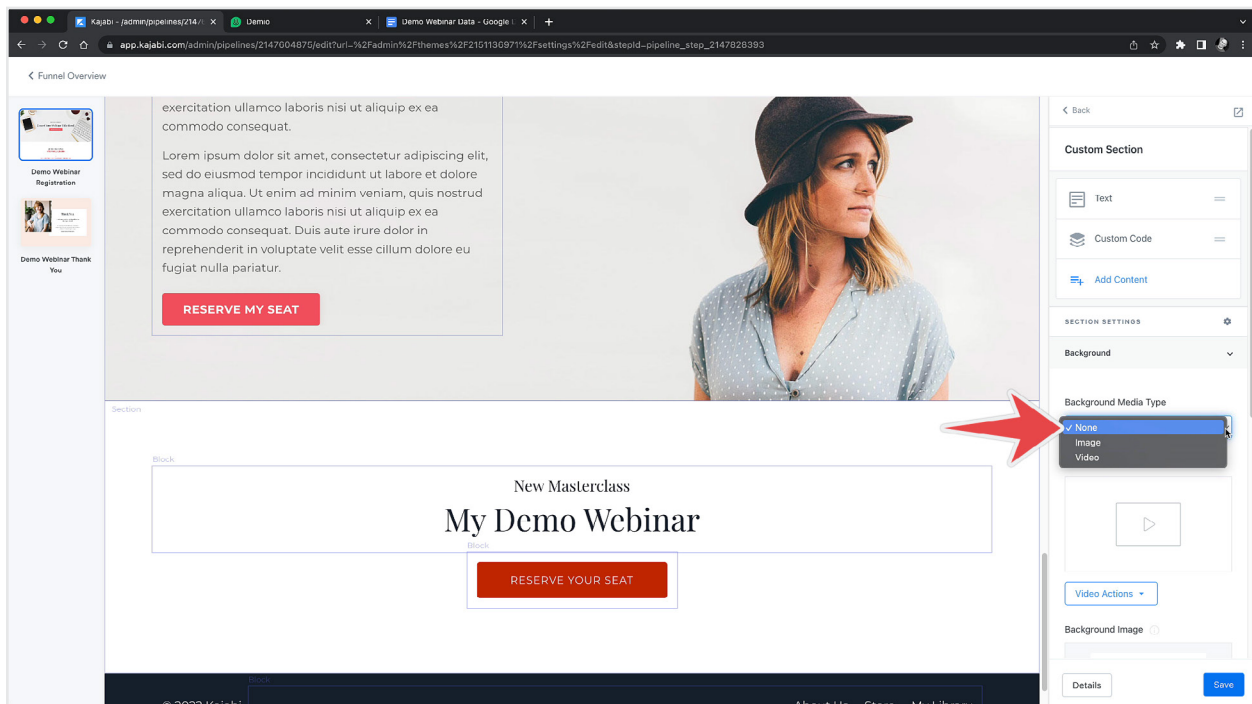
Now let's change the background of the new section you created. To do that, click on **Back**:



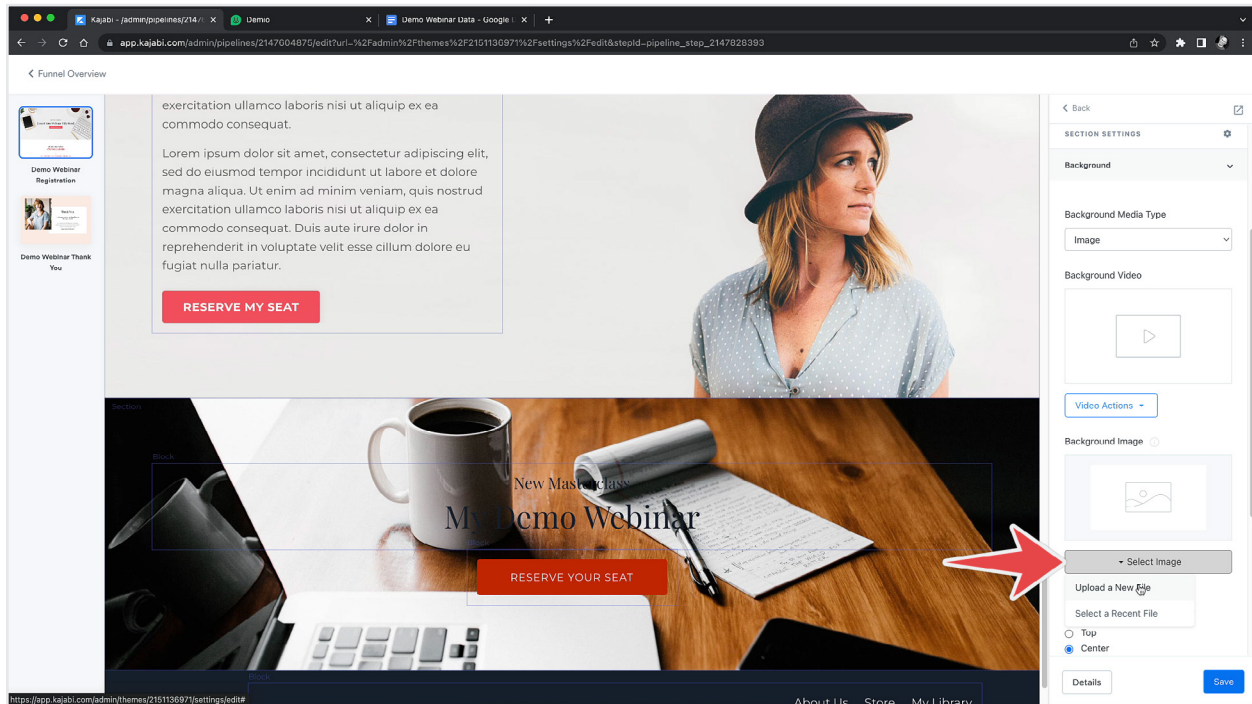
Then go down and click on **Background**:



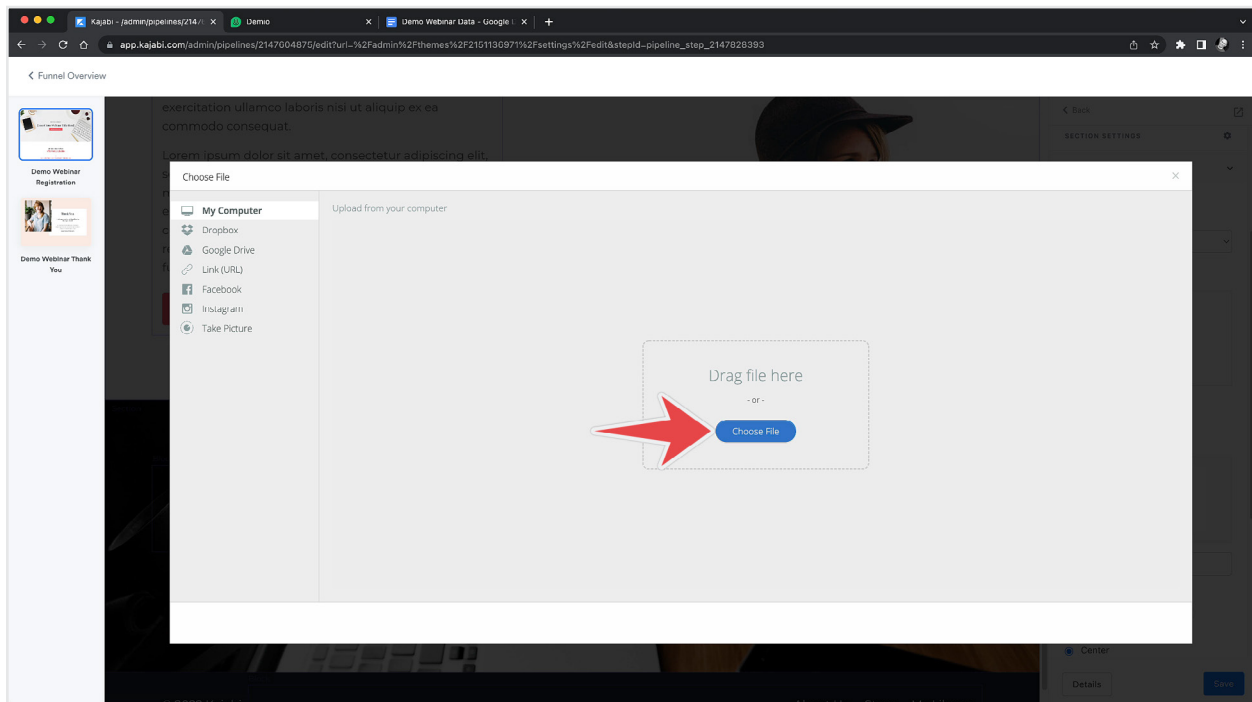
You can select different background styles. In this example, I'll choose **Image**:



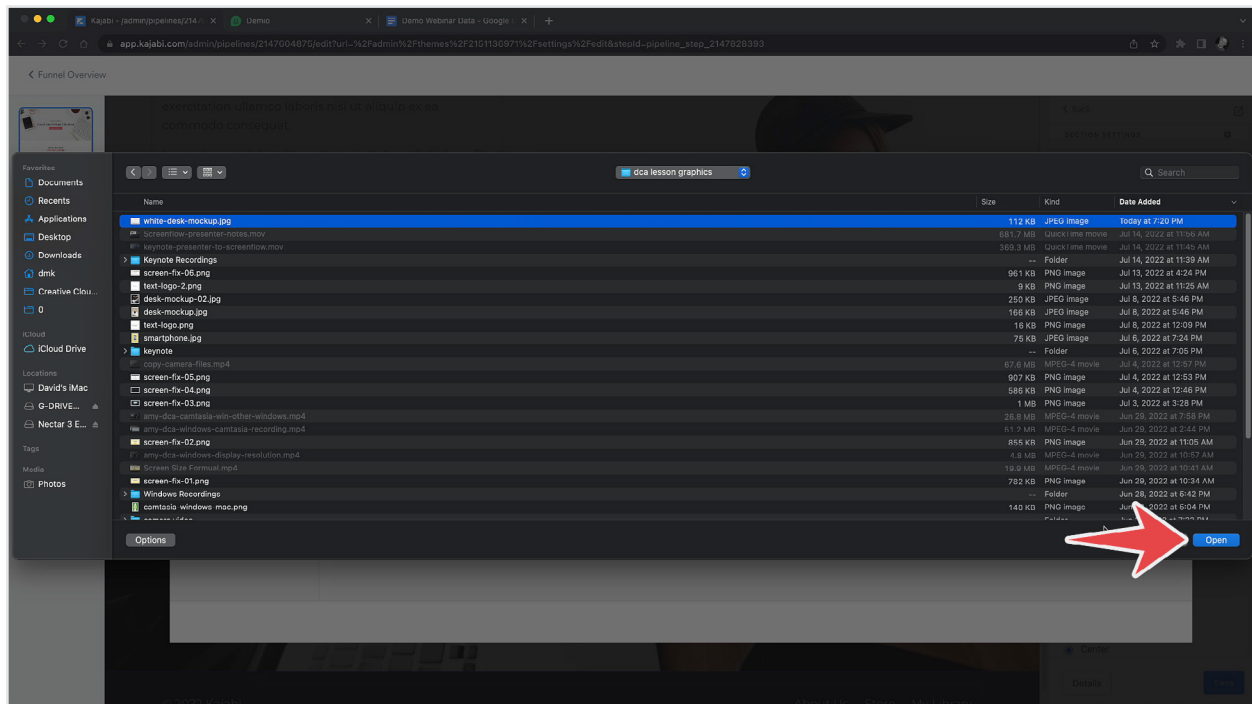
Then under the **Background Image** area, you can upload a background image to use:



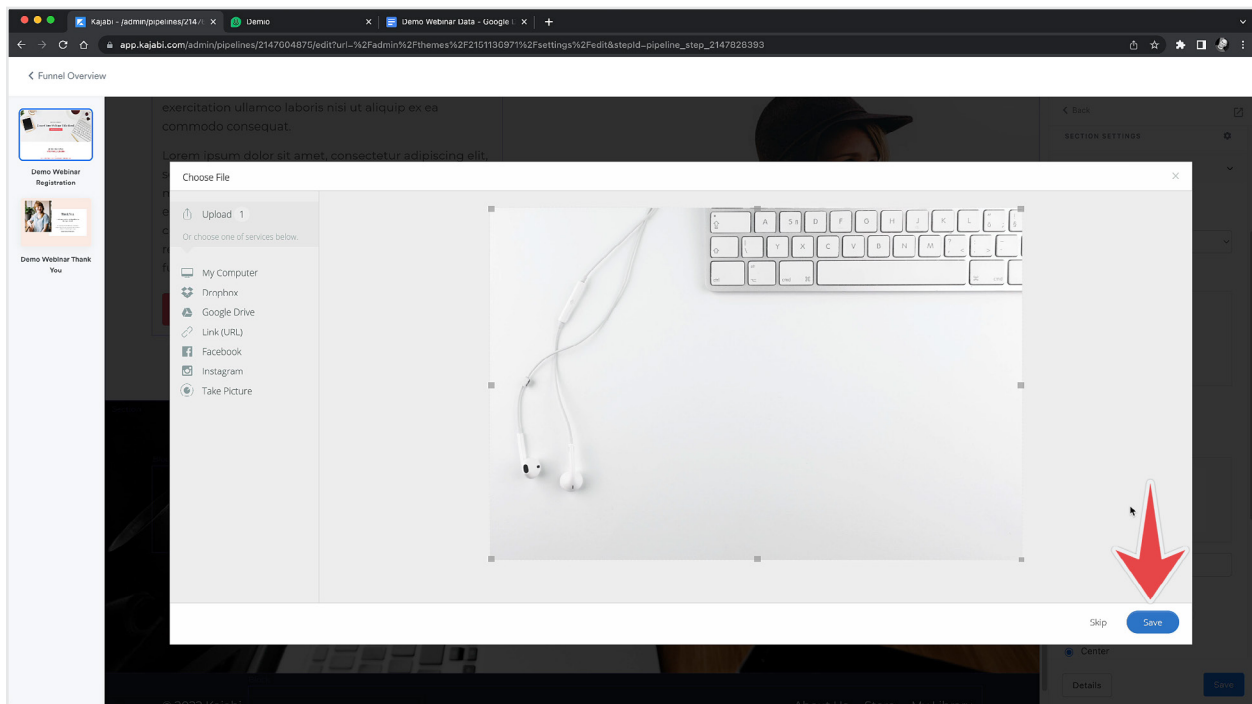
A dialog will appear where you can upload an image from a variety of sources. In this example, I'll upload from my computer and click **Choose File**:



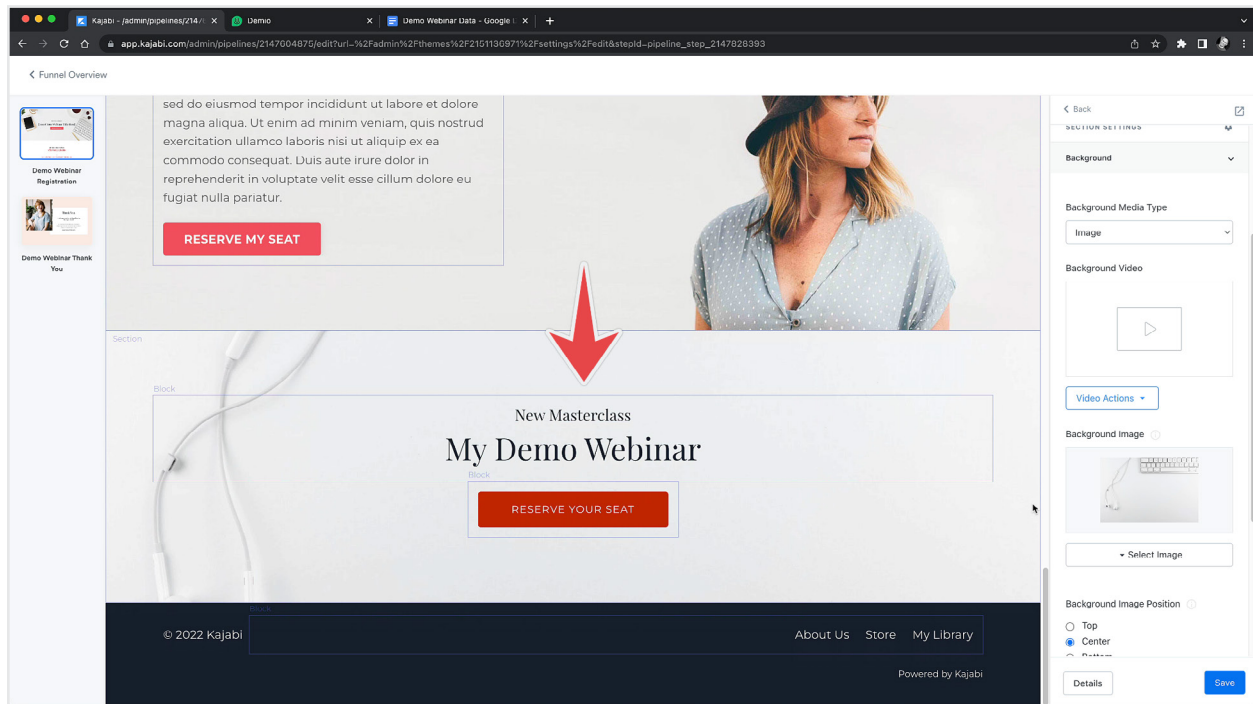
I'll pick the image I want to upload from my computer and click **Open**:



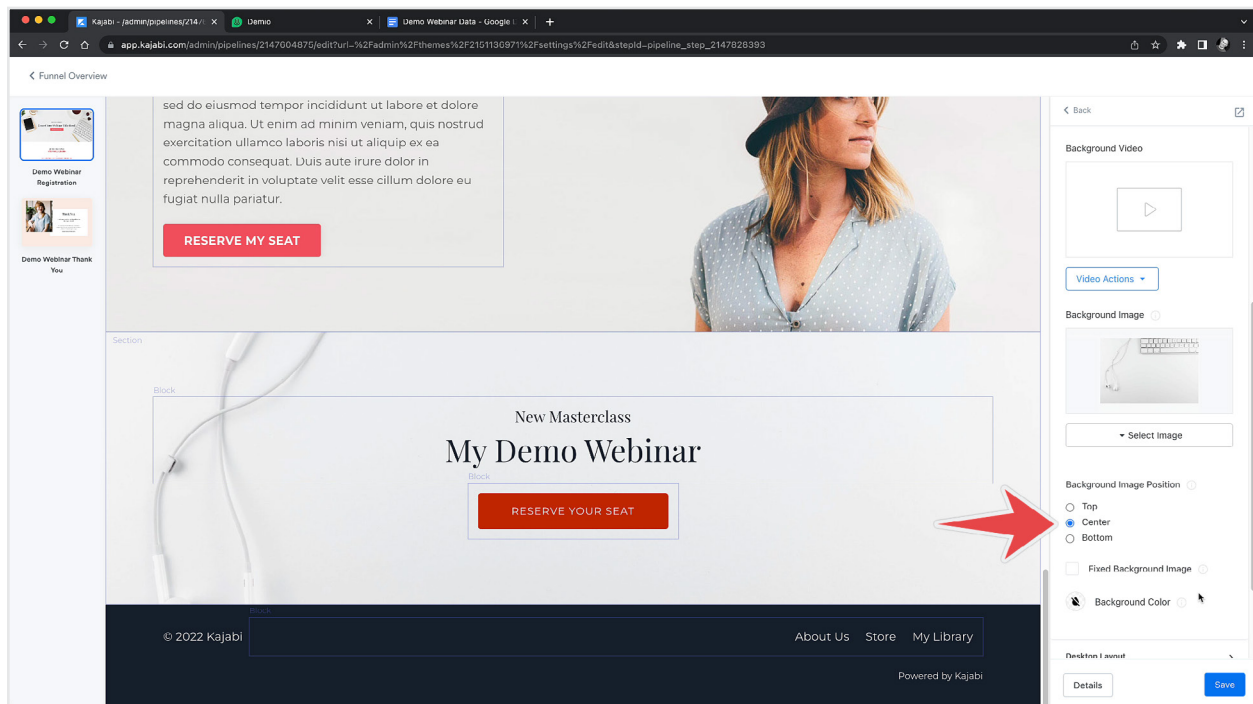
And after the image is uploaded, I'll click **Save**:



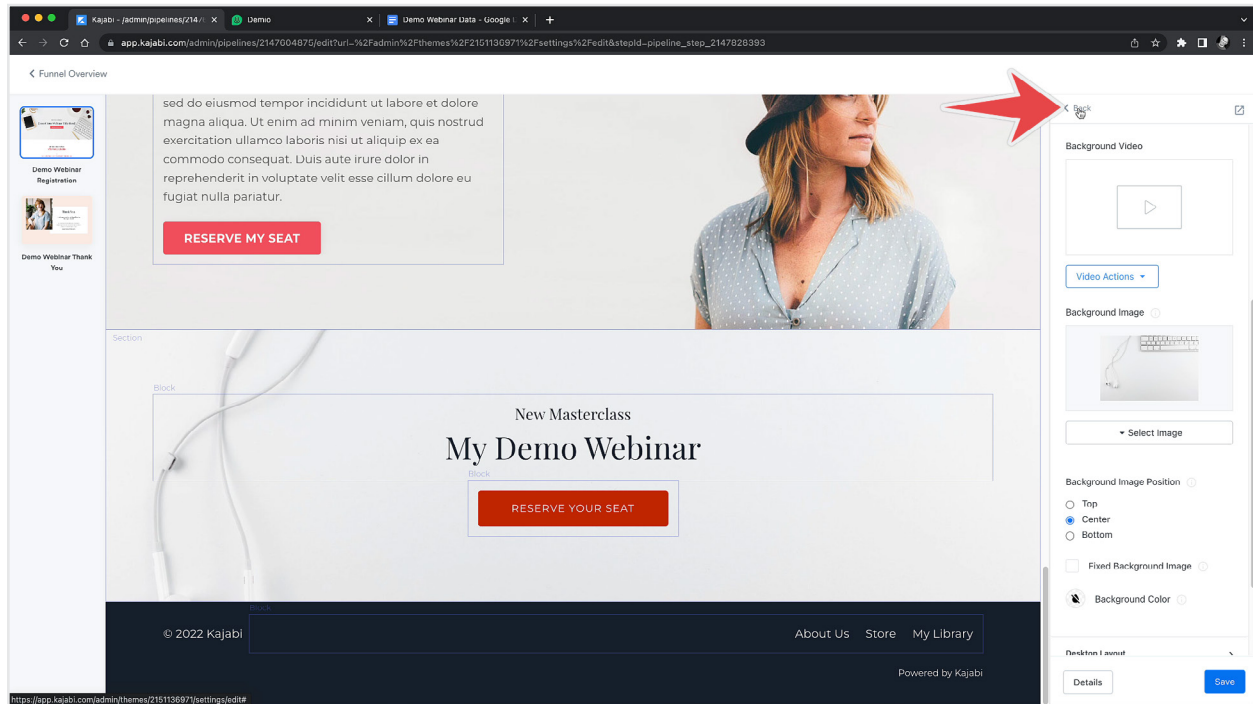
The background image is then added to the section:



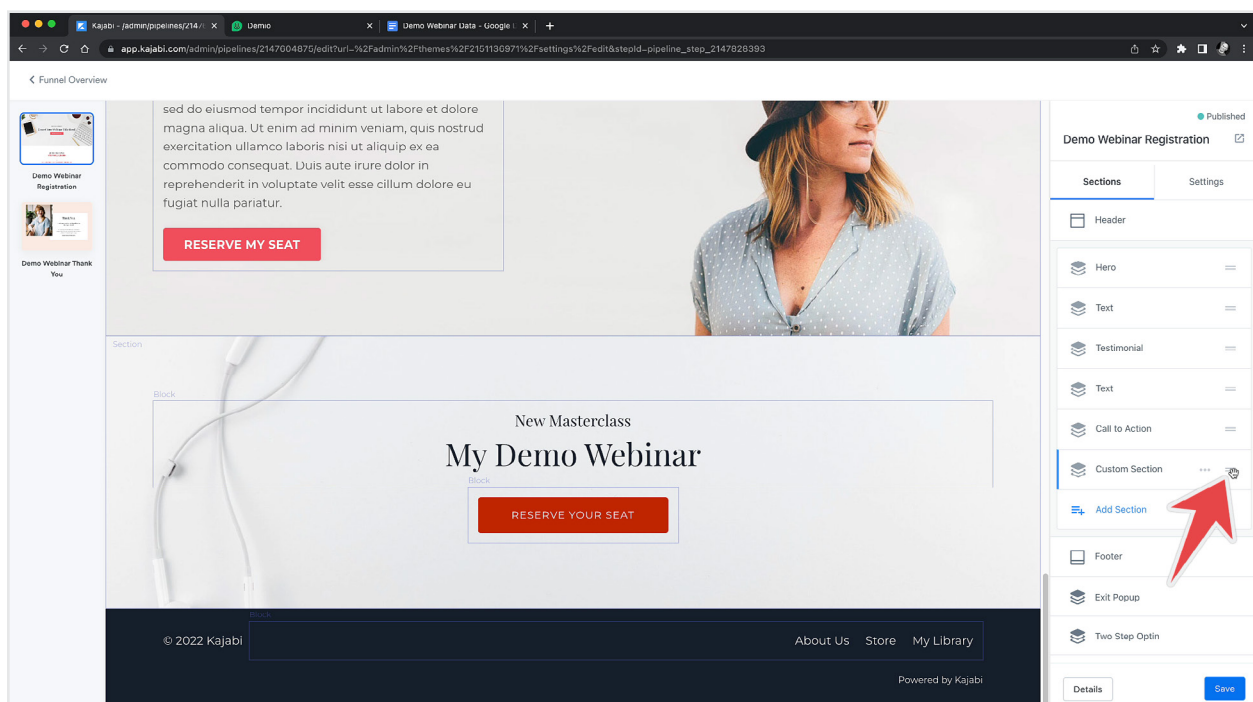
You can adjust the positioning of the image in the side panel on the right:



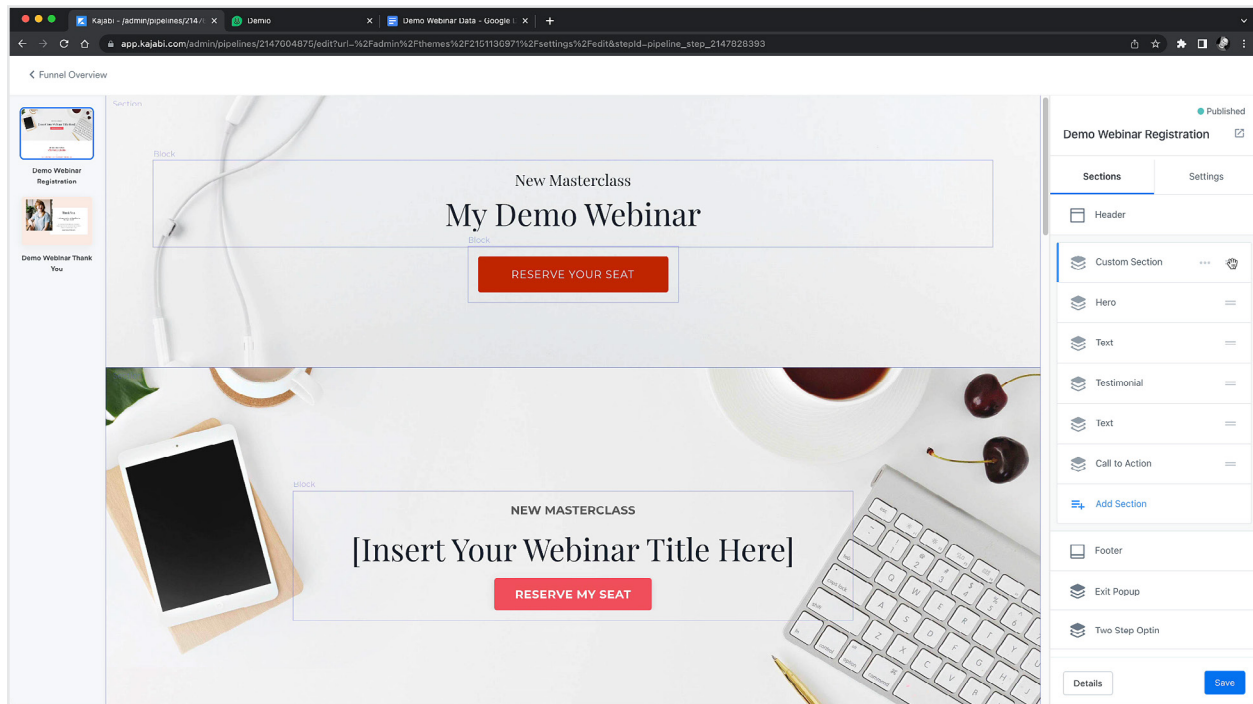
When your image is how you'd like, it's time to move this new section from the bottom of the page to the top. To begin, click on the **Back** link:



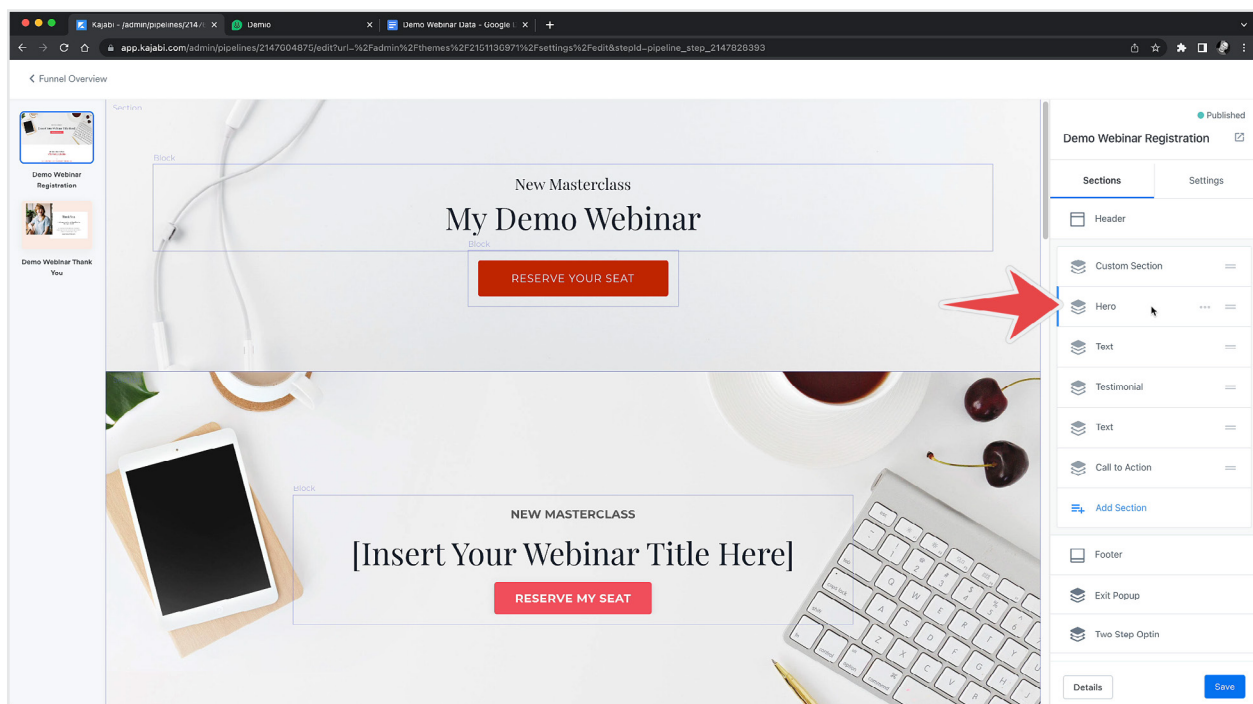
To move the section to the top of the page, in the side panel on the right, click and hold on the two bars next to the **Custom Section** and drag it to the top of the list:



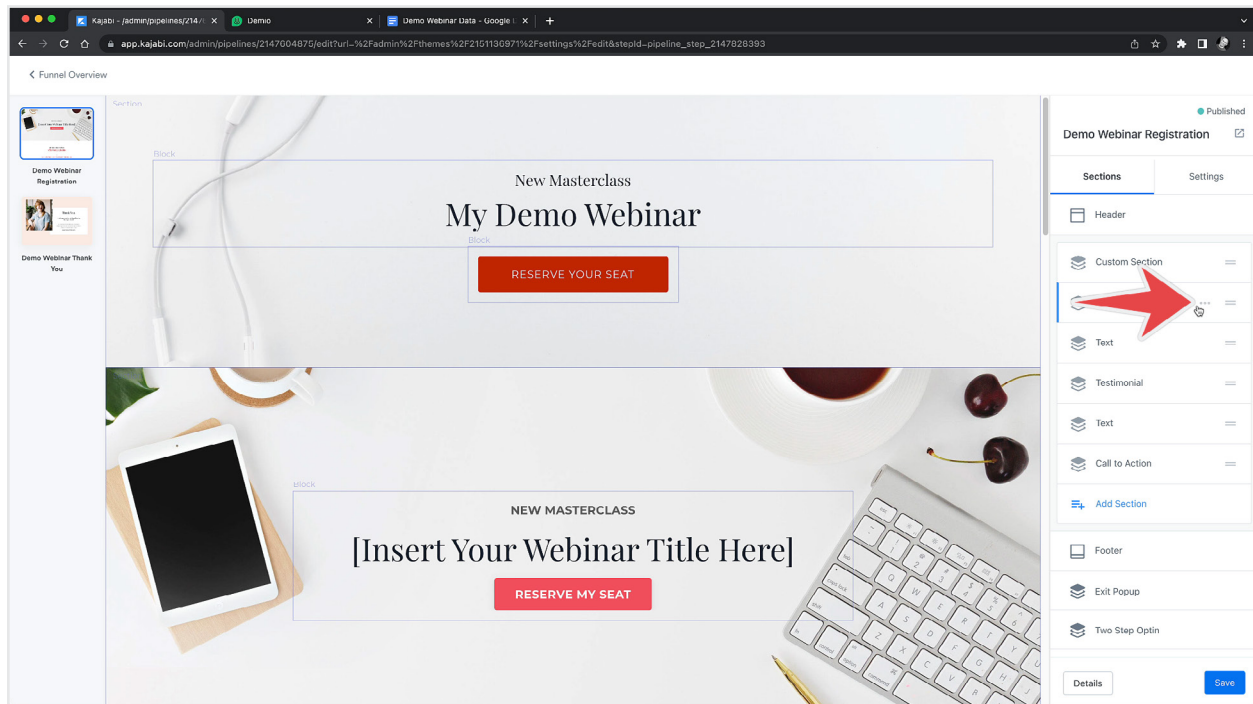
When you're done, it should look similar to this:



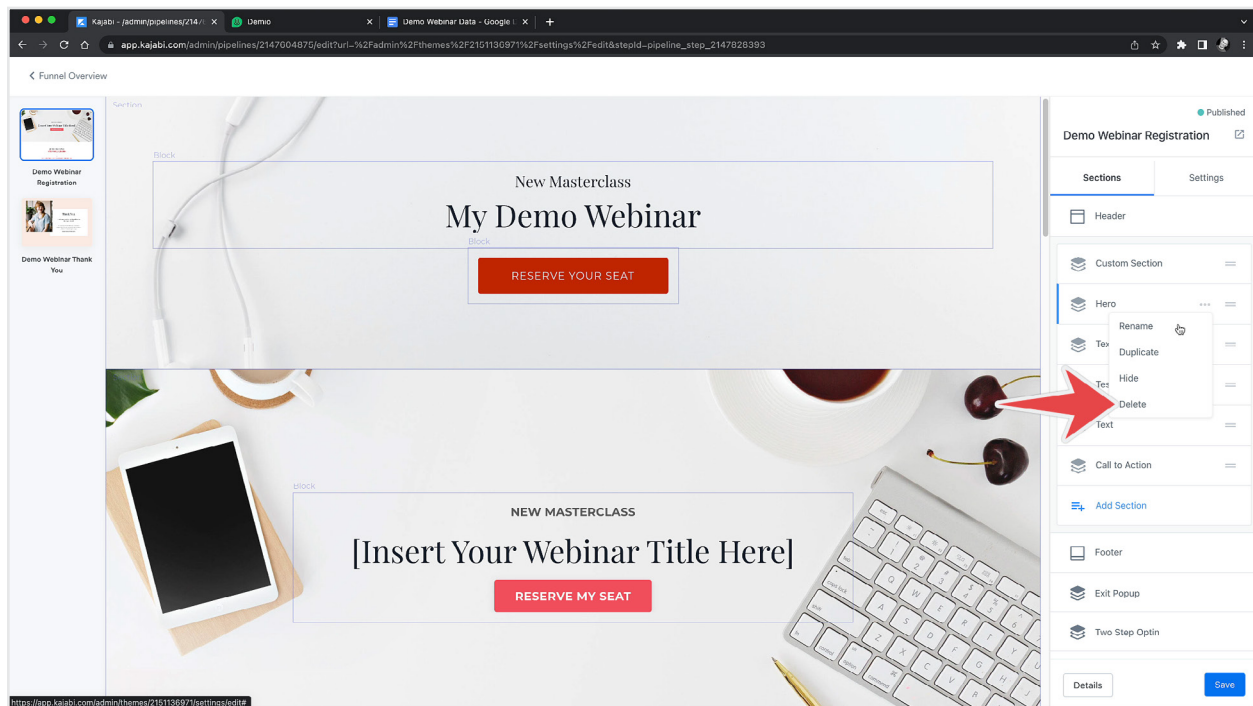
Now we need to delete the original section from the template. To do that, go to **Hero**:



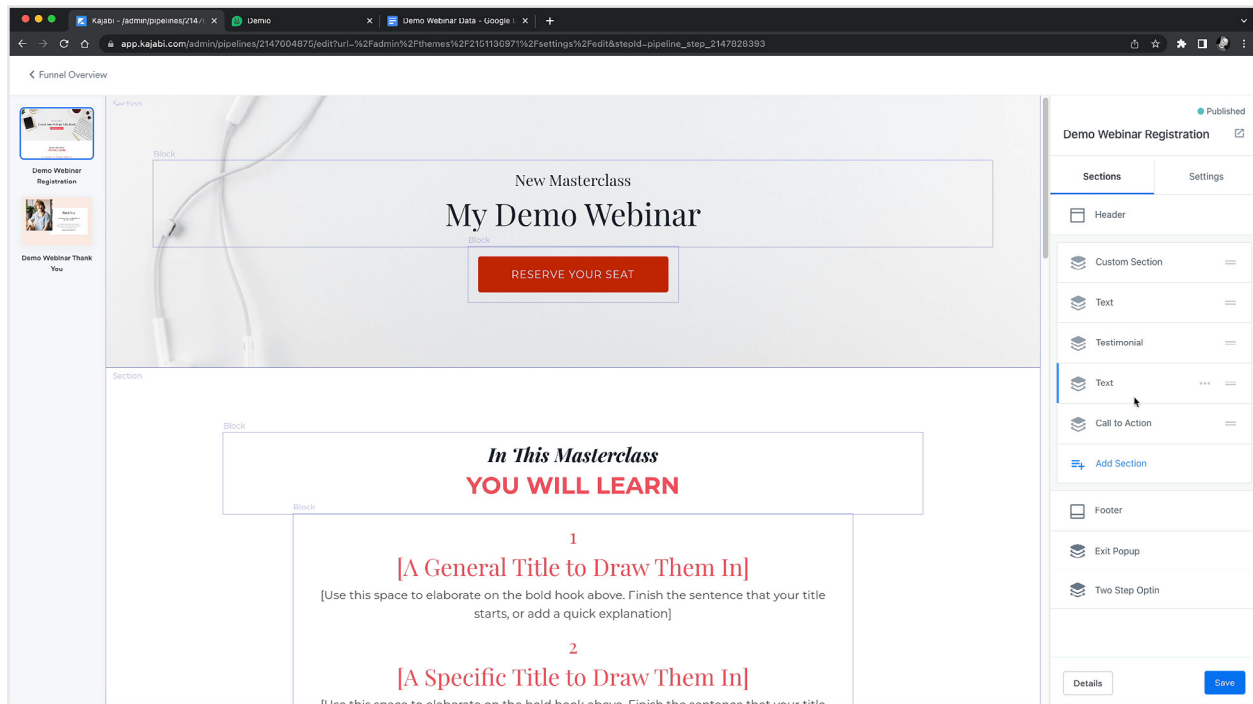
Move to the horizontal line with 3 dots and click on it:



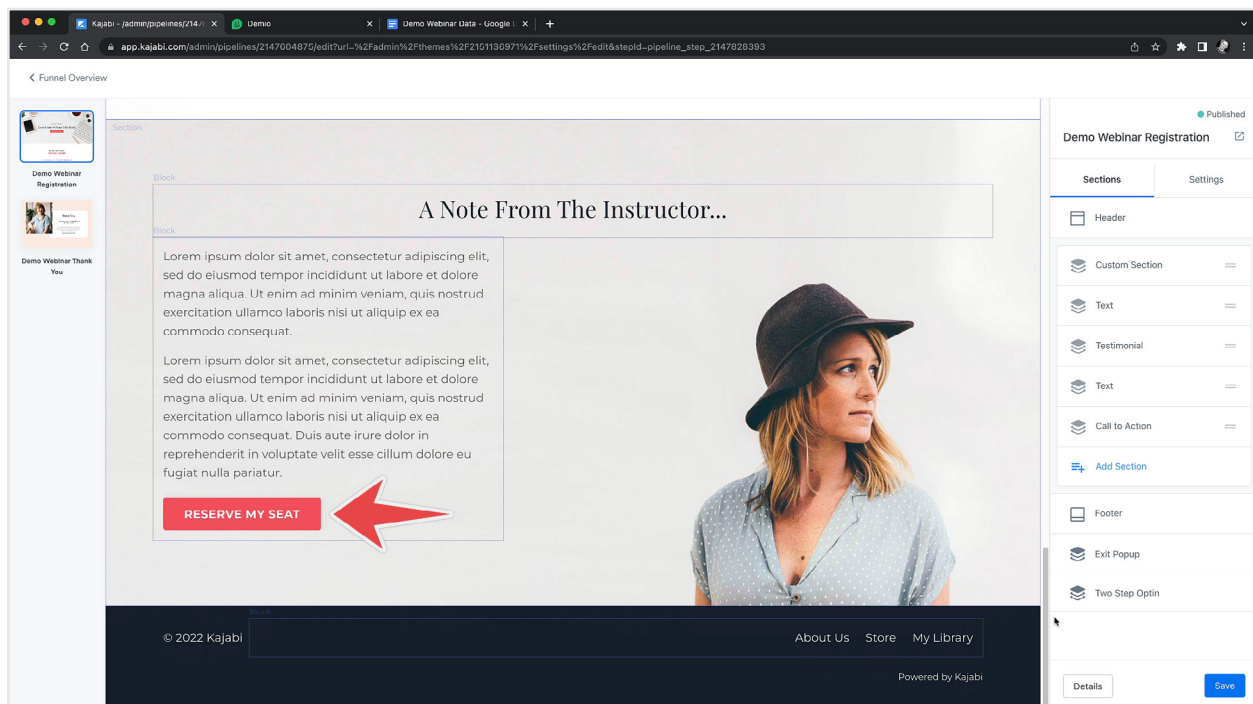
Choose **Delete**:



And the original section will be removed:

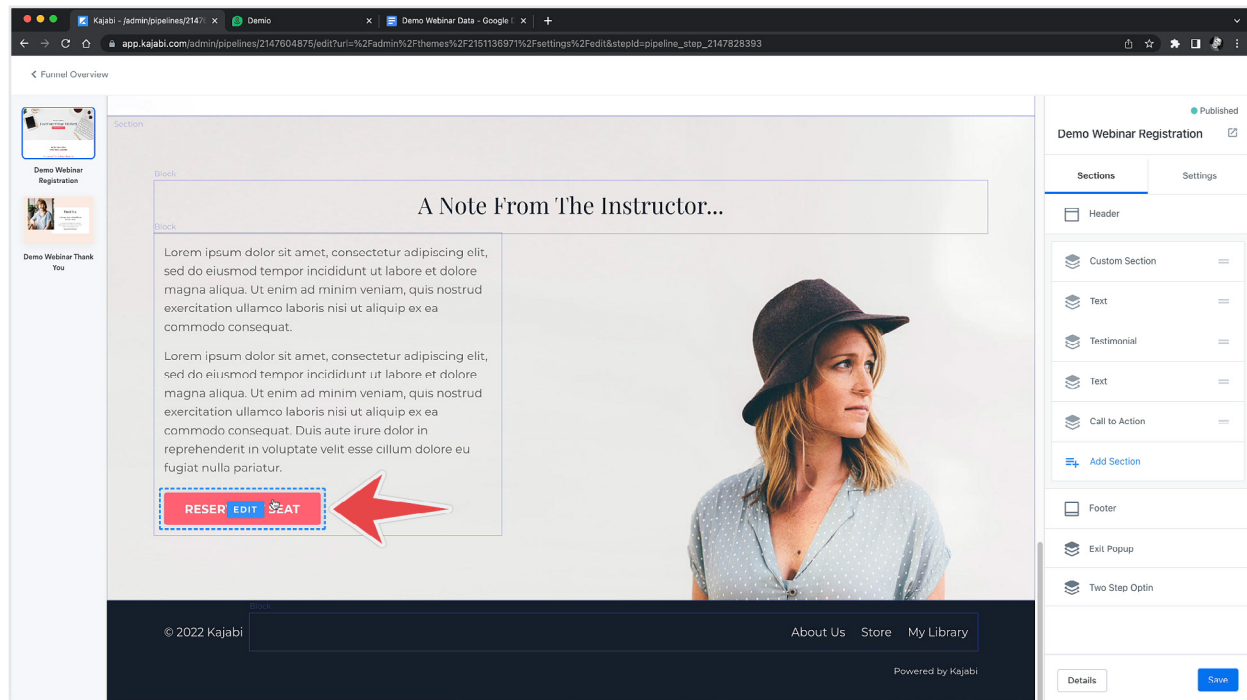


Now there's one more change you need to make to your webinar registration page. If you go down to the bottom on the page, you'll see another registration button:

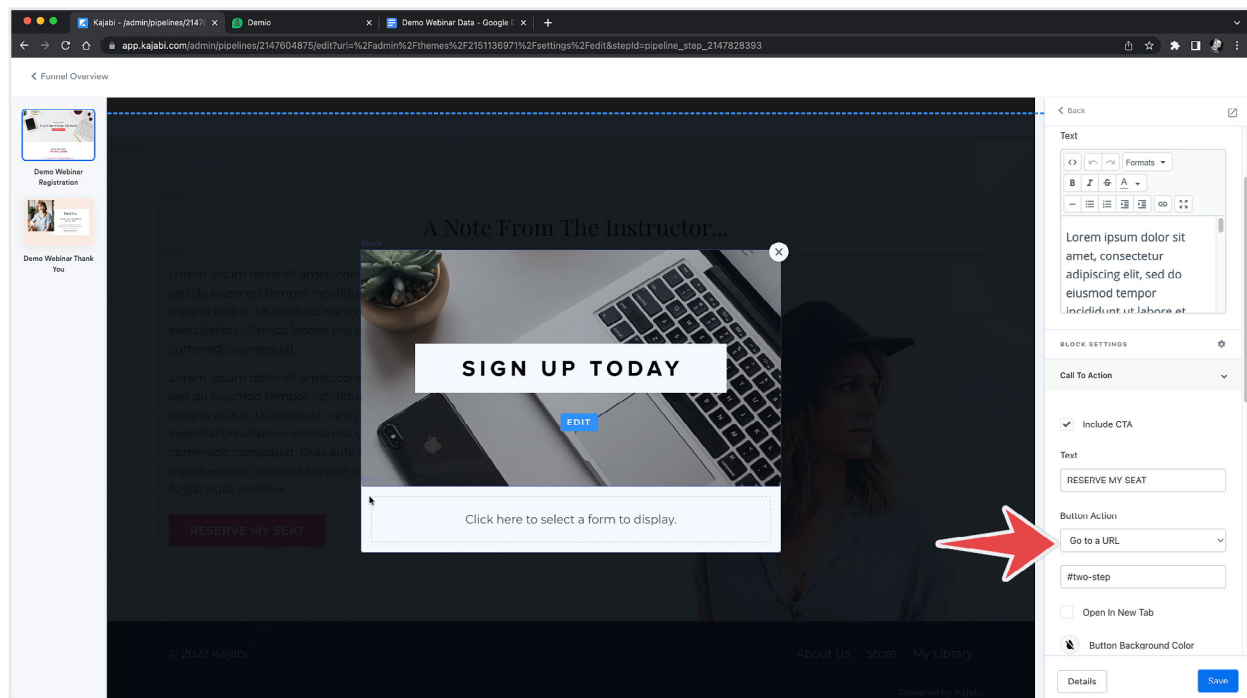


What we're going to do with this button, is set it so that when someone clicks on it, the page will scroll to the top where they can see the section we just added.

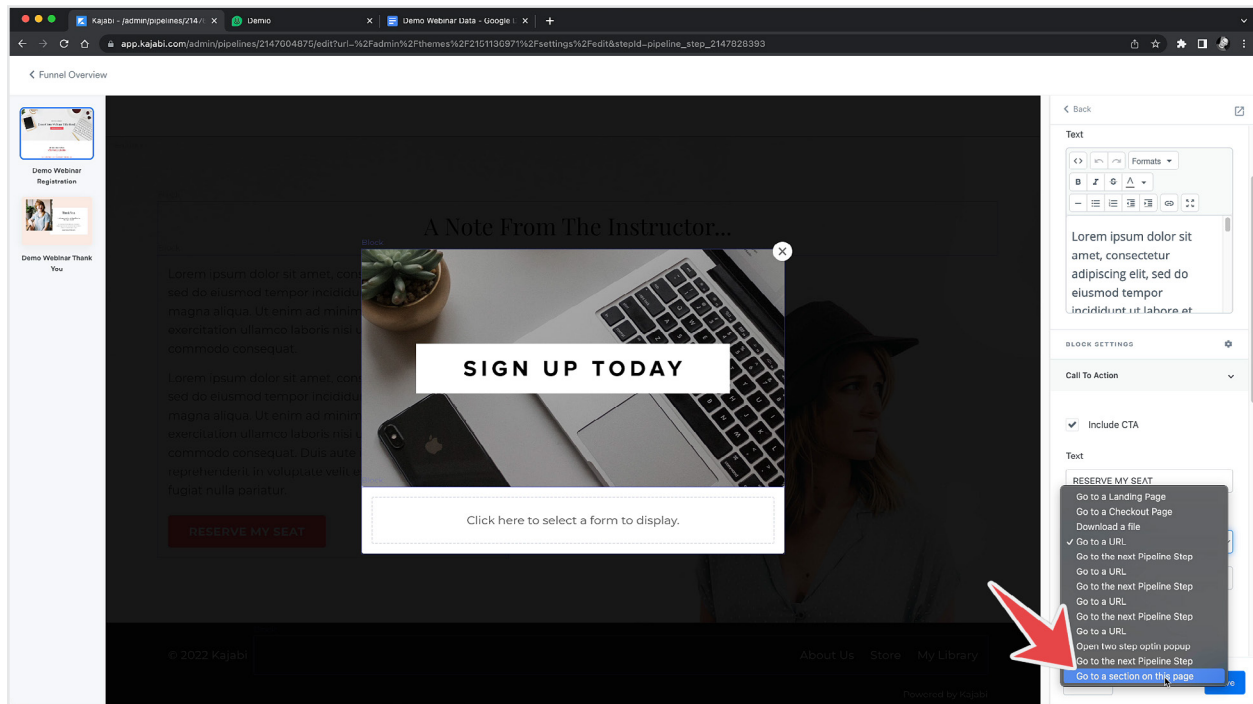
To do this, first click on **Edit** in the button:



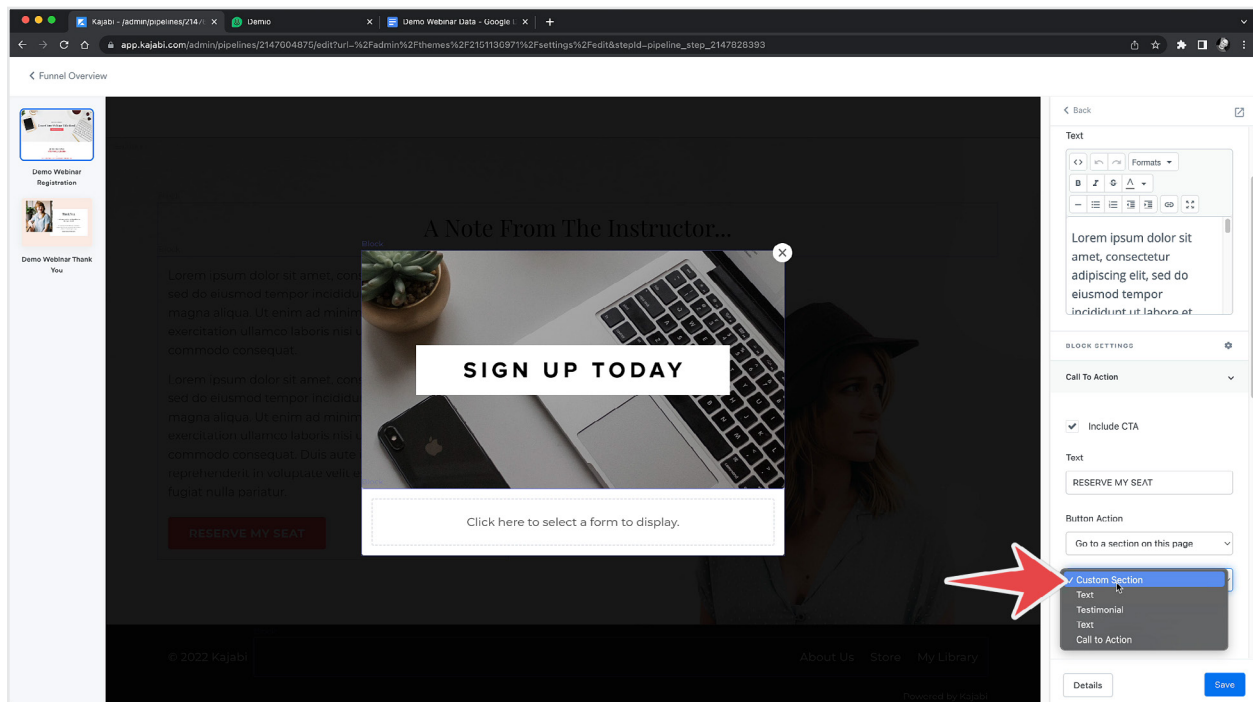
Then in the side panel on the right, go to **Button Action**:



From the dropdown, select **Go to a section on this page**:

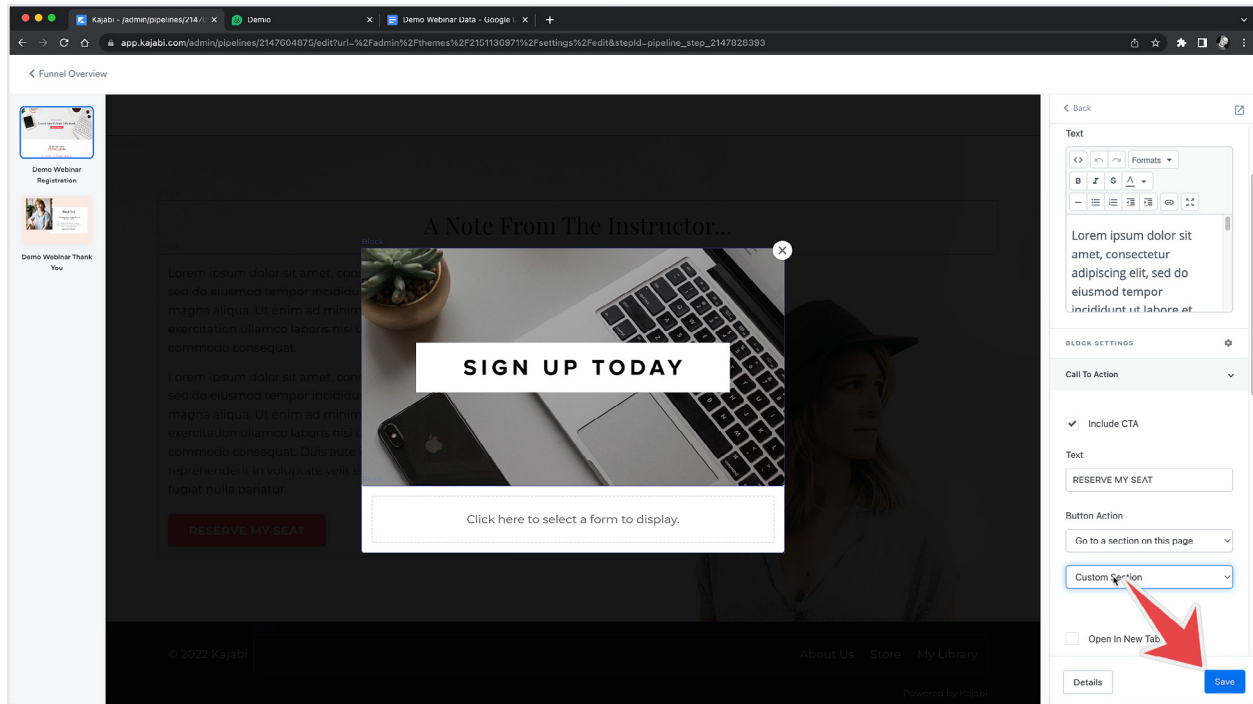


And in the dropdown that appears below that, select **Custom Section**:

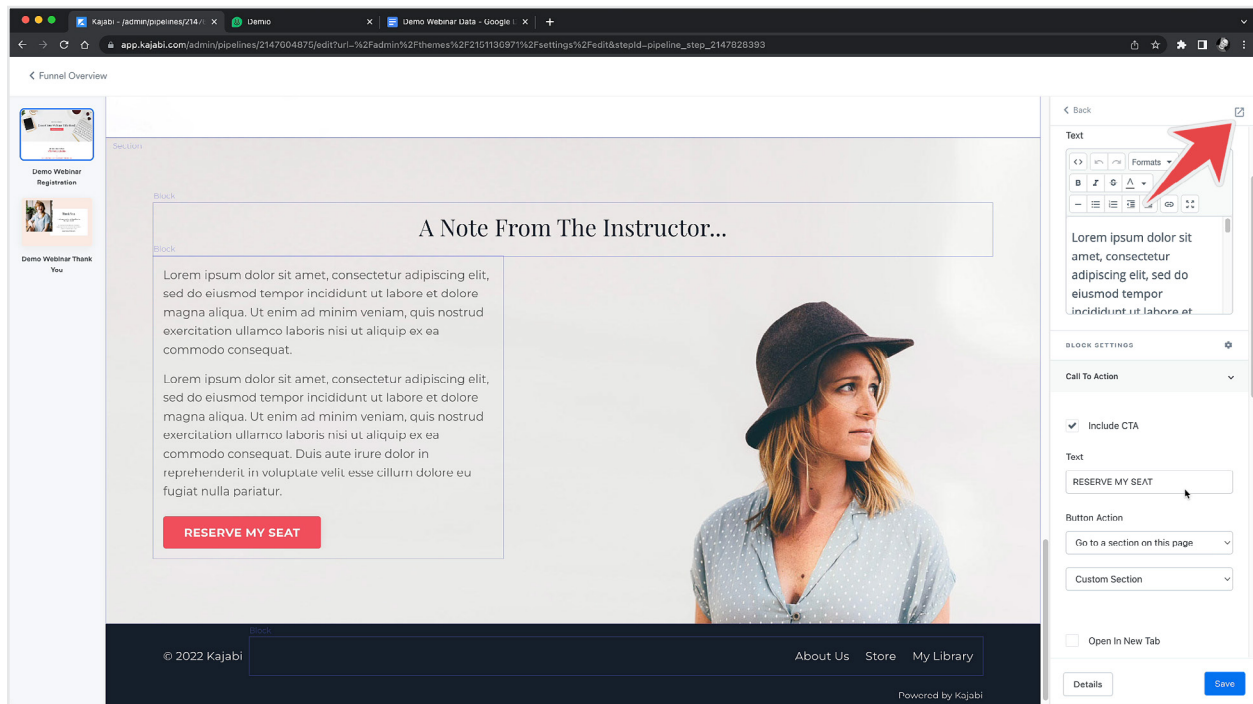


Now when someone clicks on the button, they will automatically be taken to the top of the page, where the button you embedded from Demio is located.

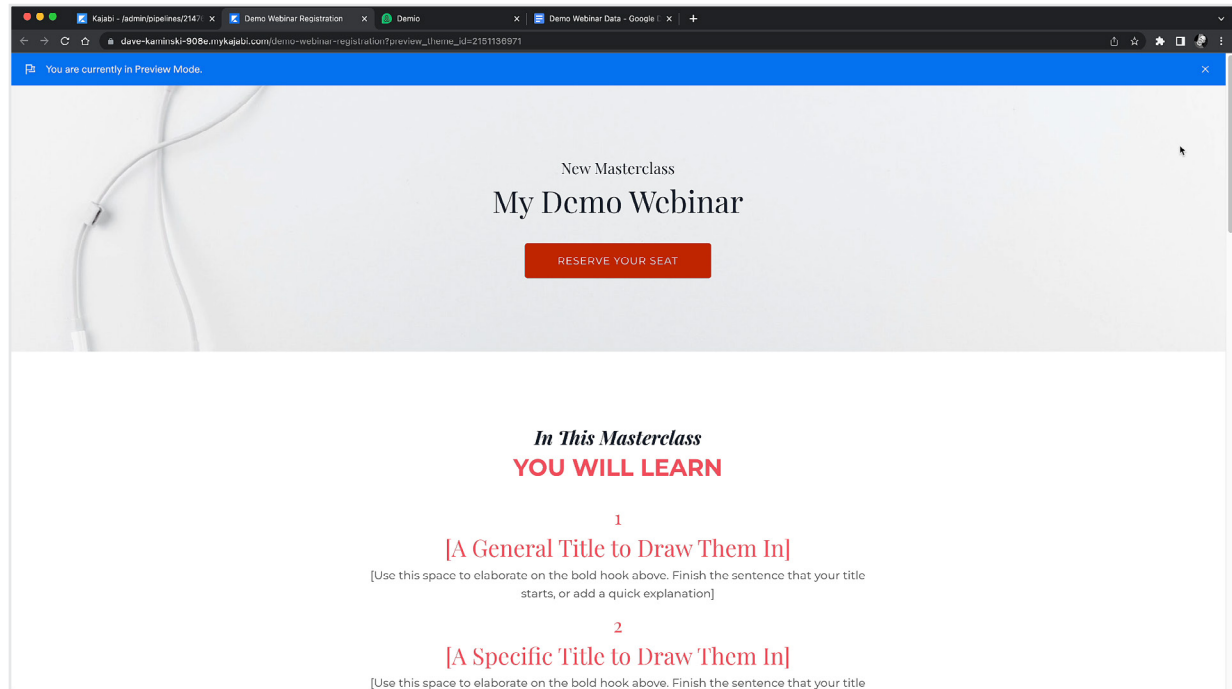
When you've made all other changes that you want to your registration page, the last step is to go down to the lower right corner and click on **Save**:



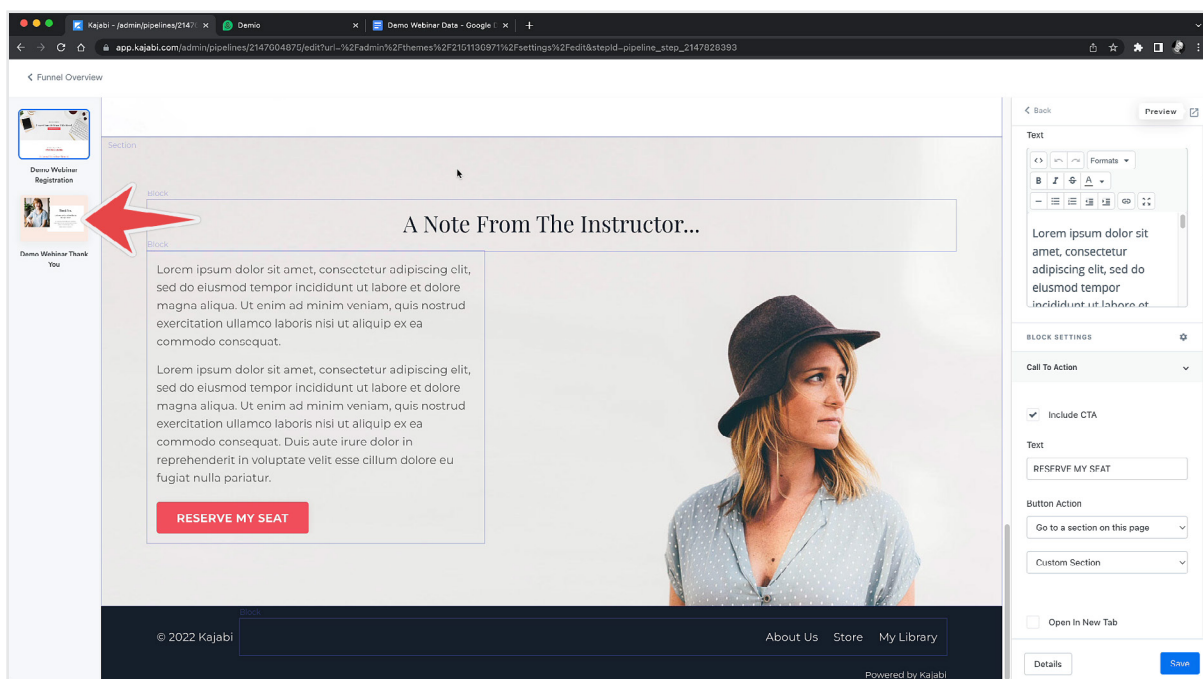
To preview the page, go to the upper right corner and click on the **Preview** icon:



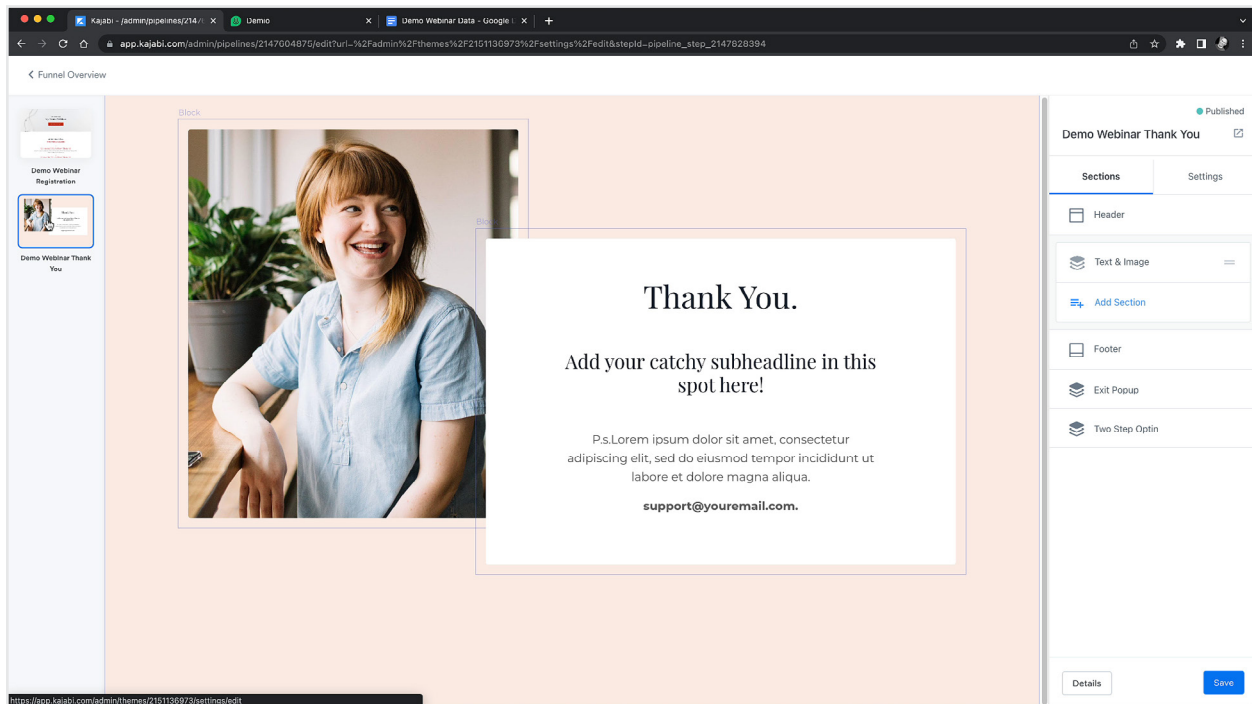
Your webinar registration page will appear in a new tab in your browser. Test all of the buttons out to make sure they work:



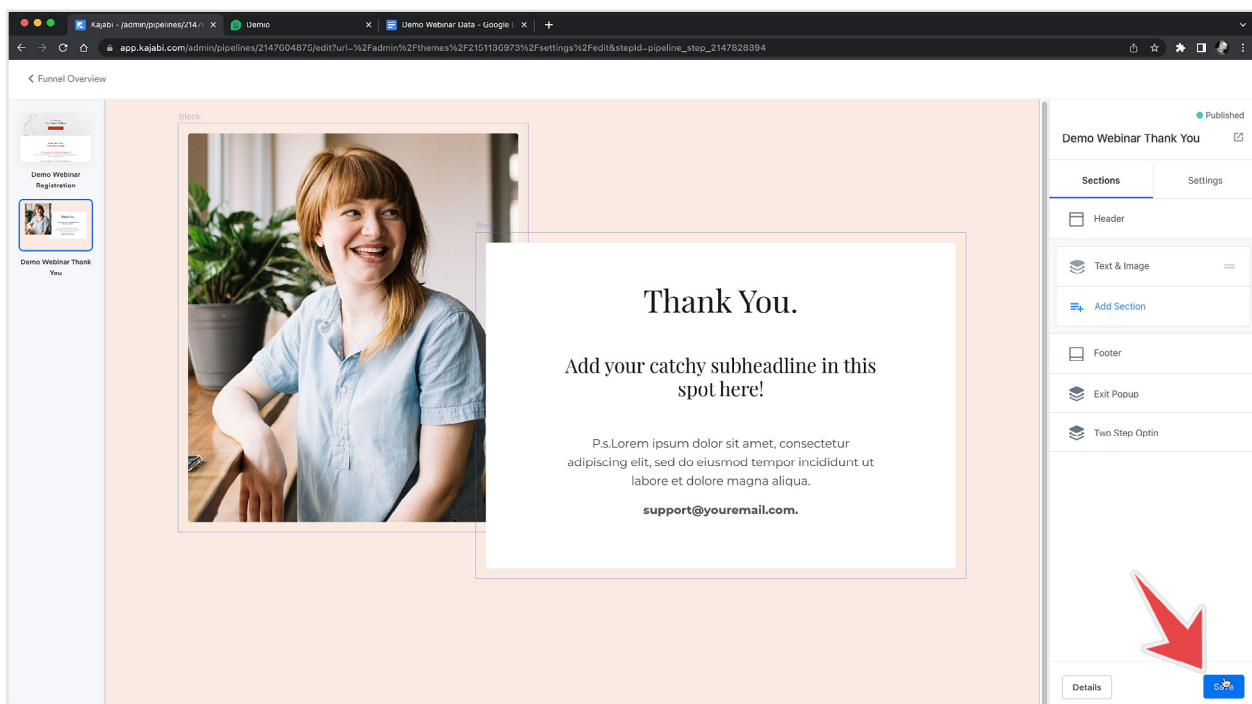
Now go back into Kajabi. Next we need to edit the thank you or confirmation page. This is the page that will appear after someone registers for any of your webinars. From the panel on the left, click on the thumbnail image for your thank you page:



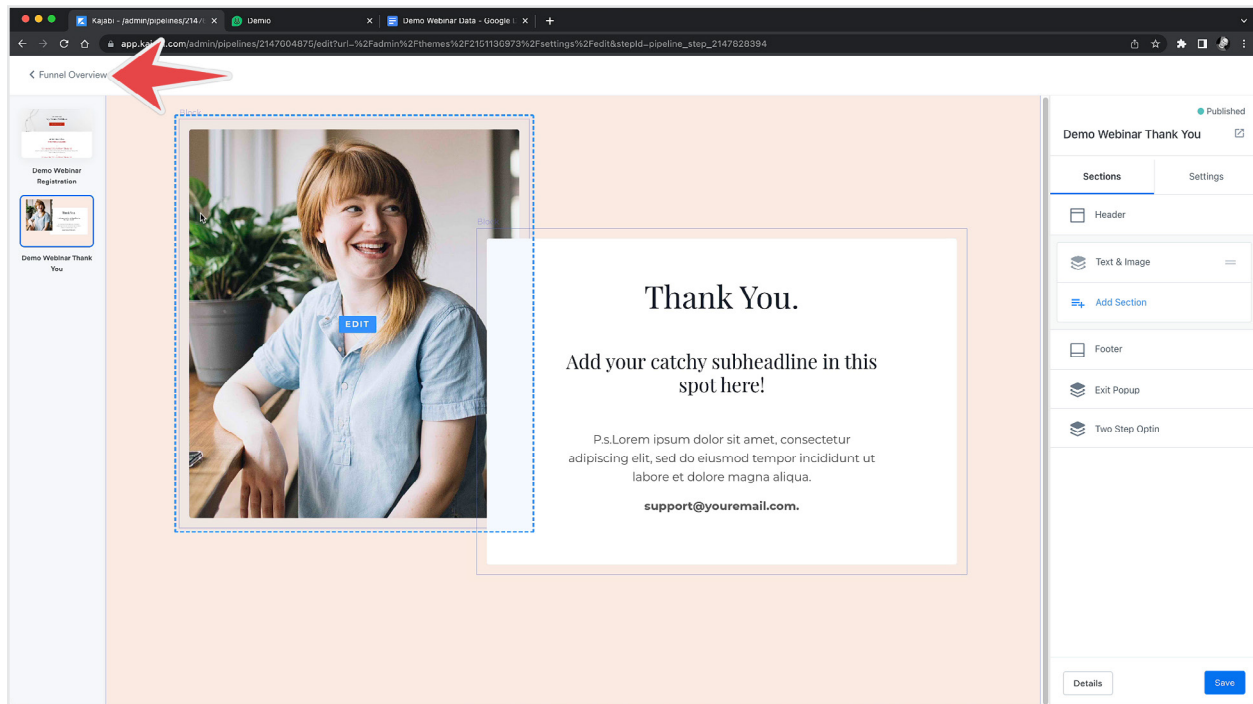
Your thank you or confirmation page will open up in the Kajabi page builder:



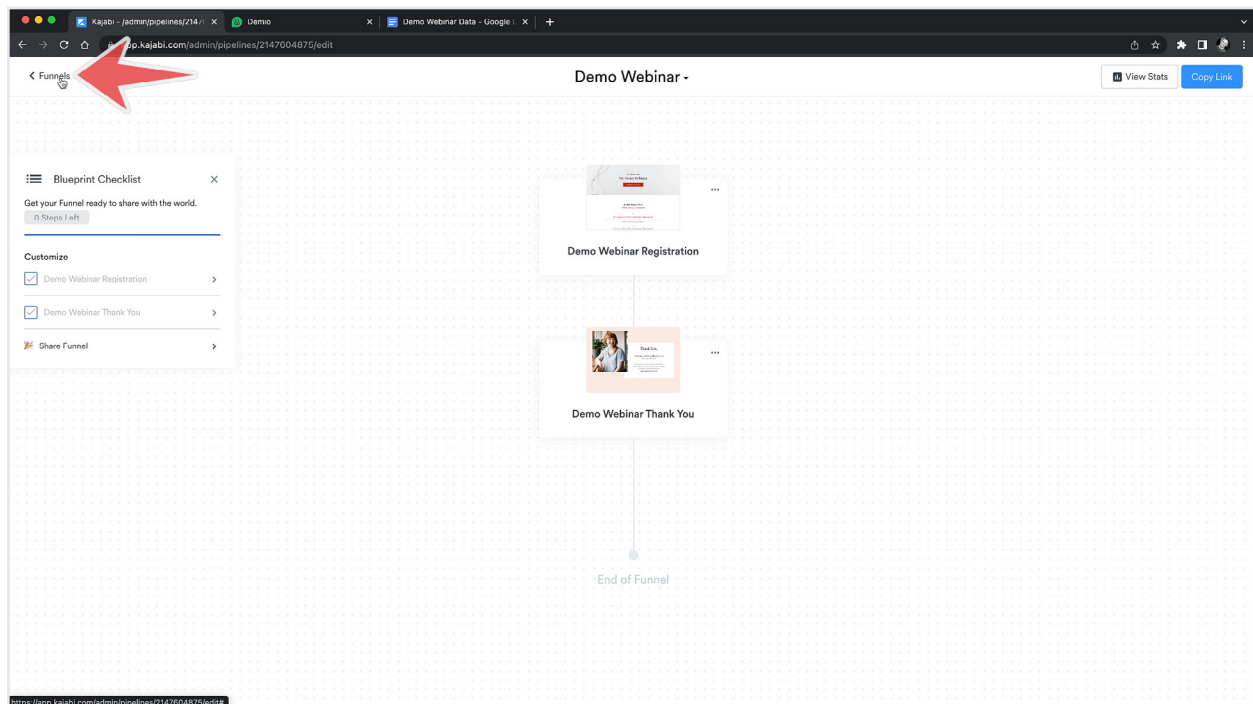
You can edit this page however you'd like. Once you're done, go to the lower right corner and click on **Save**:



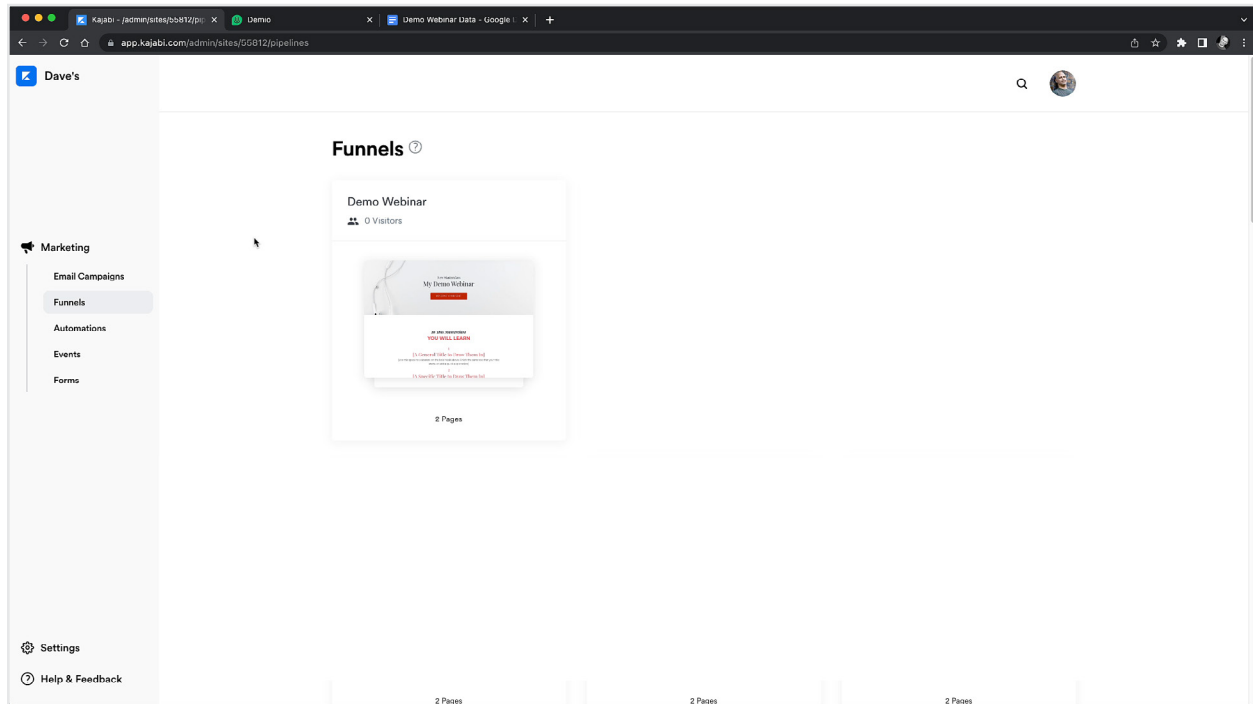
To exit the page builder, go to the upper left and click on **Funnel Overview**:



Then click on **Funnels**:



And you'll see your new webinar funnel listed in Kajabi, where you can always access or edit it:



Congratulations, you're done with **Step 1**. But there's still more to do.

In **Step 2**, we're going to set up integrations between Demio and your email list provider by using a free service called Zapier. This is so Demio can pass on the webinar registrant information to your email list provider.

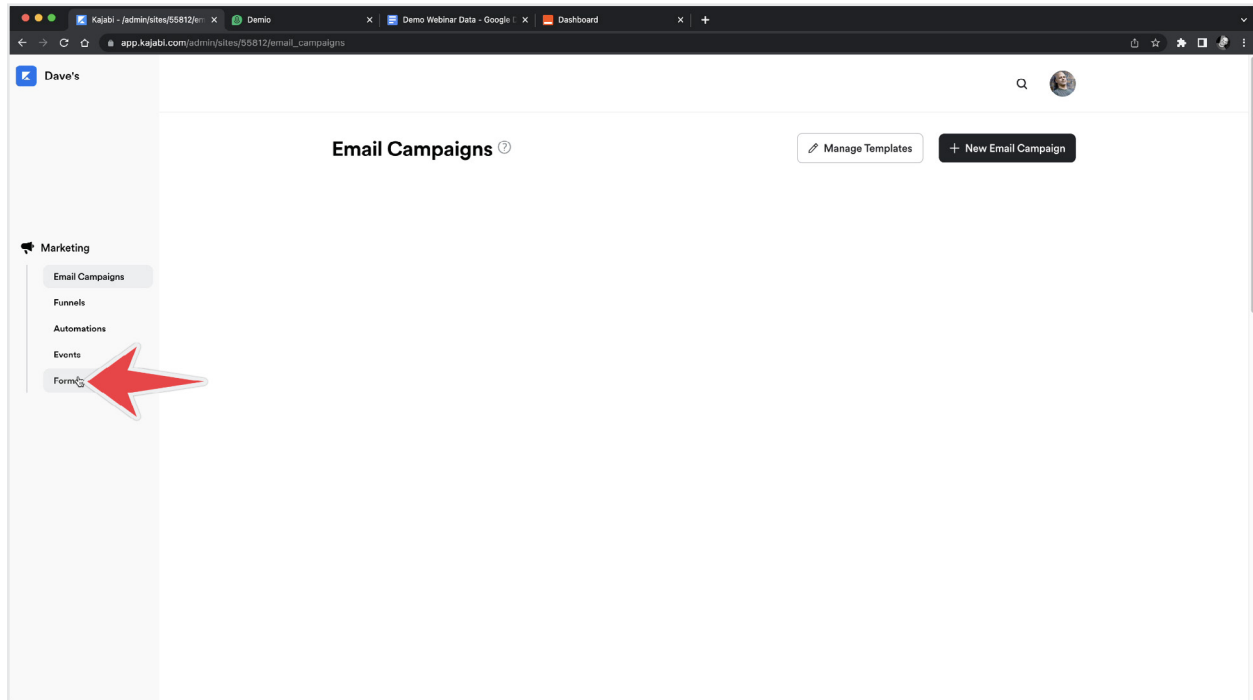
Amy recommends that you use either Kajabi or ConvertKit as your email list provider. Because each of those integrate differently with Demio, there are two different **Step 2** sections, one for Kajabi and one for ConvertKit. Move on to the **Step 2** section for the email list provider you'll be using.

STEP 2

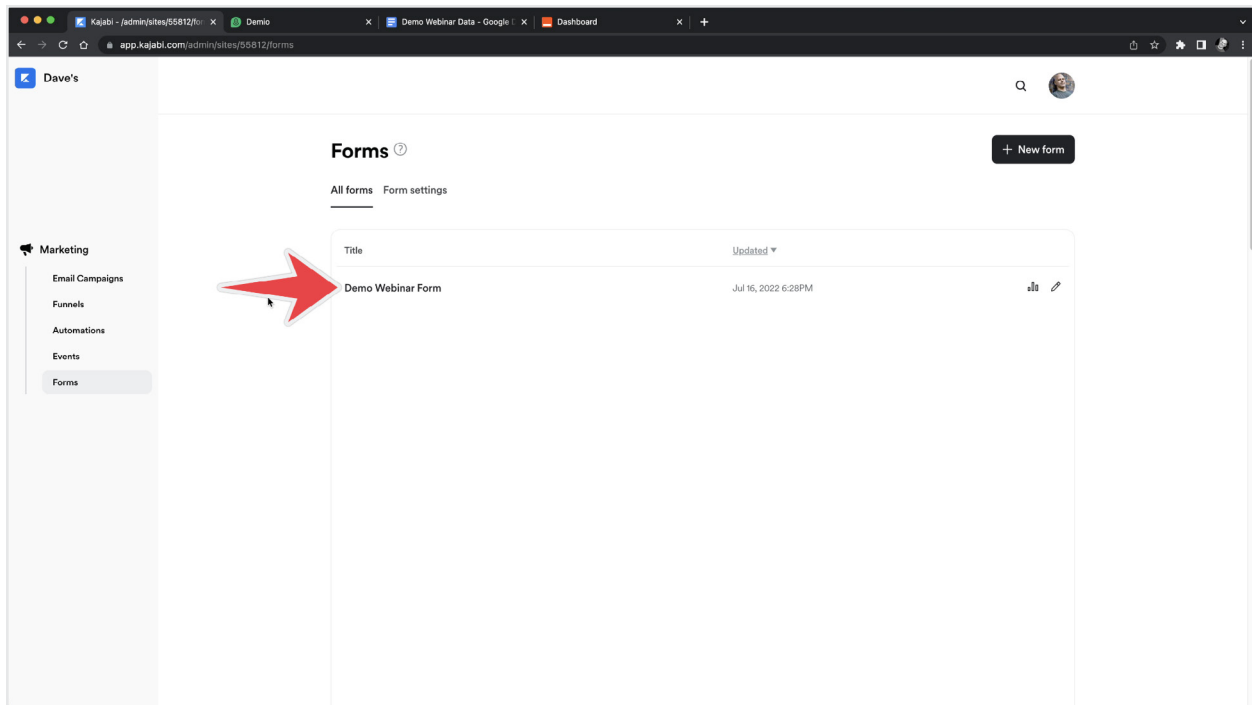
Connecting Kajabi and Demio Through Zapier

In **Step 2**, you are going to integrate Kajabi and Demio through a free service called Zapier. The reason why you'll do this is so Demio can pass on webinar registrant information to Kajabi, which will then be used in emails that you send through Kajabi.

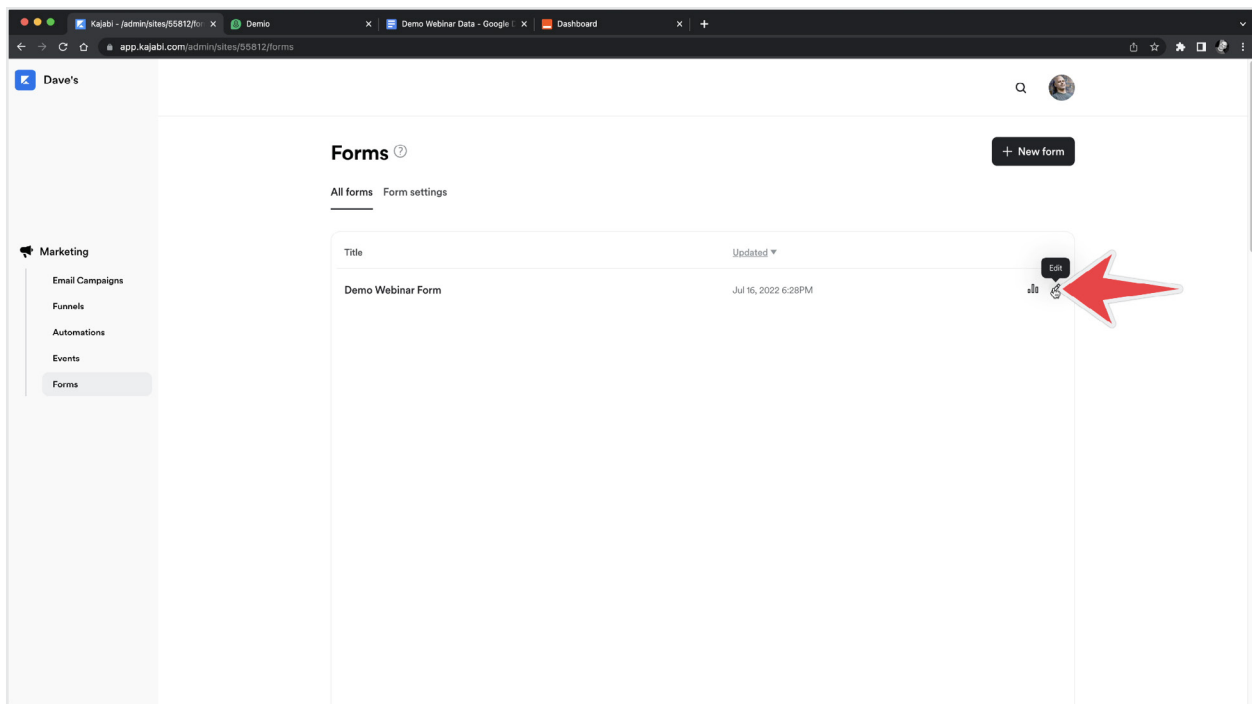
For **Step 2**, we are going to begin in Kajabi. Go to the side panel to the left, select **Marketing** and then choose **Forms**.



And what you'll see is that Kajabi has already created a form using the same name as the webinar funnel you created in **Step 1**. No one is ever gonna see this form. But you're going to use it as a back door, so to speak, to allow Demio and Kajabi to communicate:



You need to make a couple of small changes to this form before you start using it. To begin, go to the pencil icon on the right to edit the form:



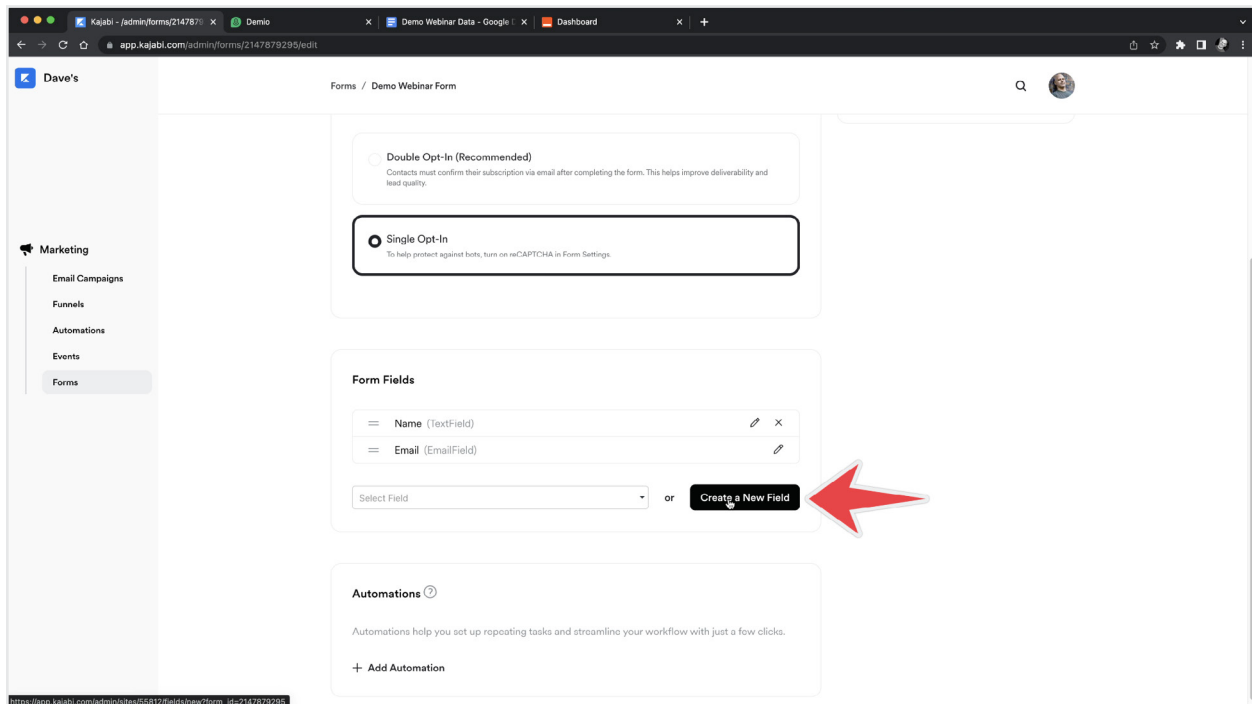
On the next screen, under **Opt-In Settings**, change it to **Single Opt-In**:

The screenshot shows the 'Demo Webinar Form' settings page in Kajabi. The left sidebar has a 'Marketing' menu with 'Forms' selected. The main content area has tabs for 'Form details', 'Submissions', and 'Embed'. The 'Form details' tab is active, showing the 'Internal Title' as 'Demo Webinar Form'. The 'Opt-In Settings' section has two options: 'Double Opt-In (Recommended)' and 'Single Opt-In'. A red arrow points to the 'Single Opt-In' option. Below this is the 'Additional Options' section with a toggle for 'Send custom confirmation email to new contacts'.

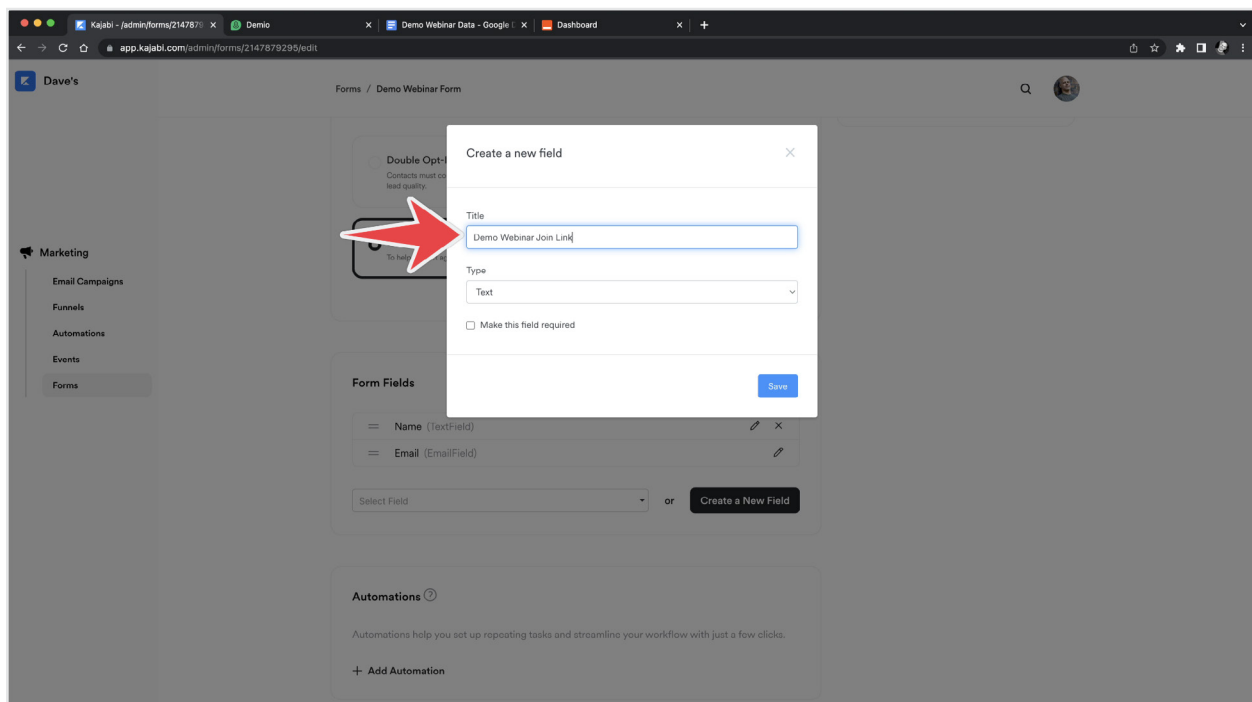
Then scroll down a little bit and you'll see the **Form Fields** section. Right now it has fields for name and email. You need to add two custom fields to the form, so click on **Add Form Fields**:

The screenshot shows the 'Demo Webinar Form' settings page, scrolled down to the 'Form Fields' section. The 'Opt-In Settings' section is now at the top, with 'Single Opt-In' selected. The 'Form Fields' section shows two existing fields: 'Name (TextField)' and 'Email (EmailField)'. Below them is a red arrow pointing to the '+ Add Form Field' button. At the bottom is the 'Automations' section with an '+ Add Automation' button.

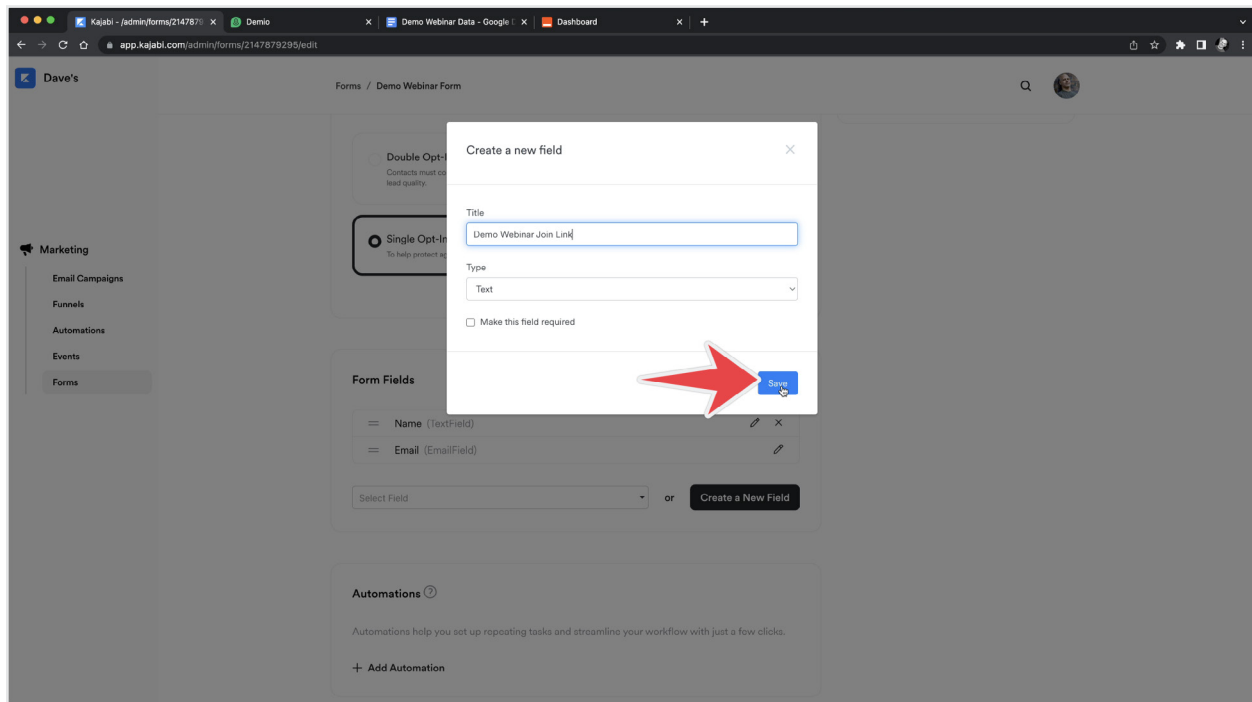
Then go over and click on Create a New Field:



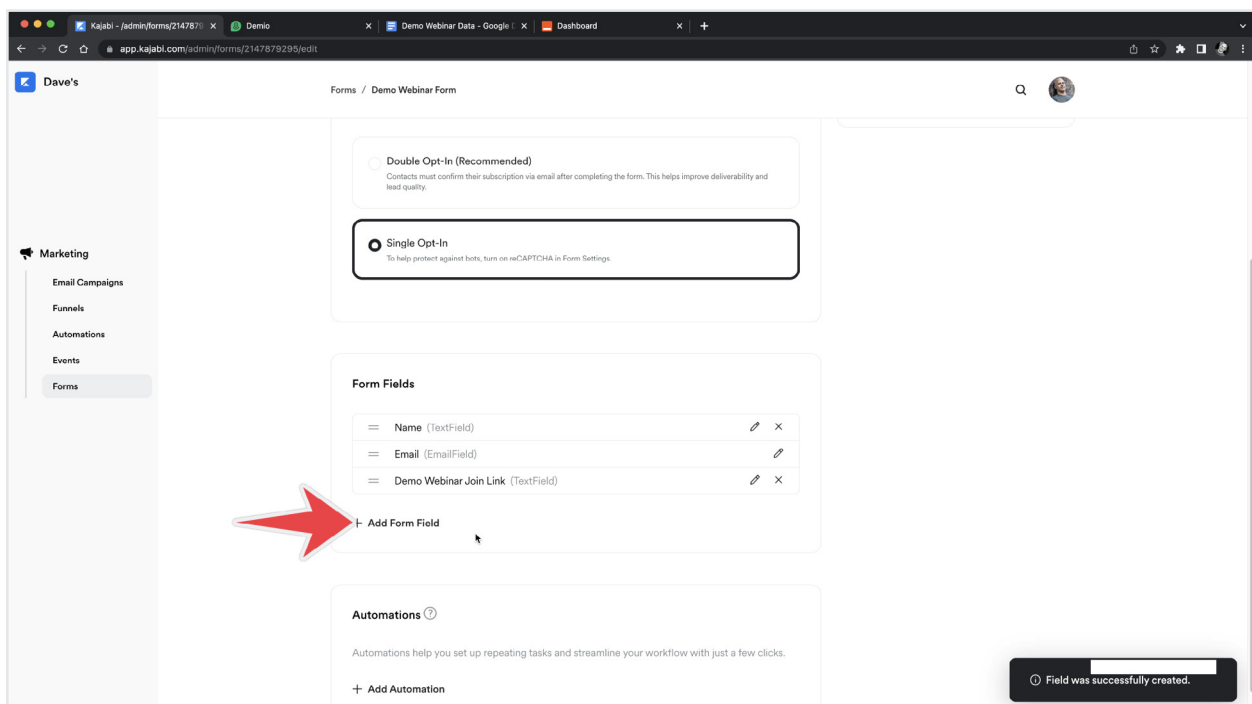
A dialogue will appear. The first field that you are adding will be for the join link for your webinar. So you want to name the field accordingly. For example, I've named my Demo Webinar Join Link:



Then go down and click on **Save**:



Next, you'll do the same thing, but you'll add a field for your webinar date. Click on **Add Form Field**:



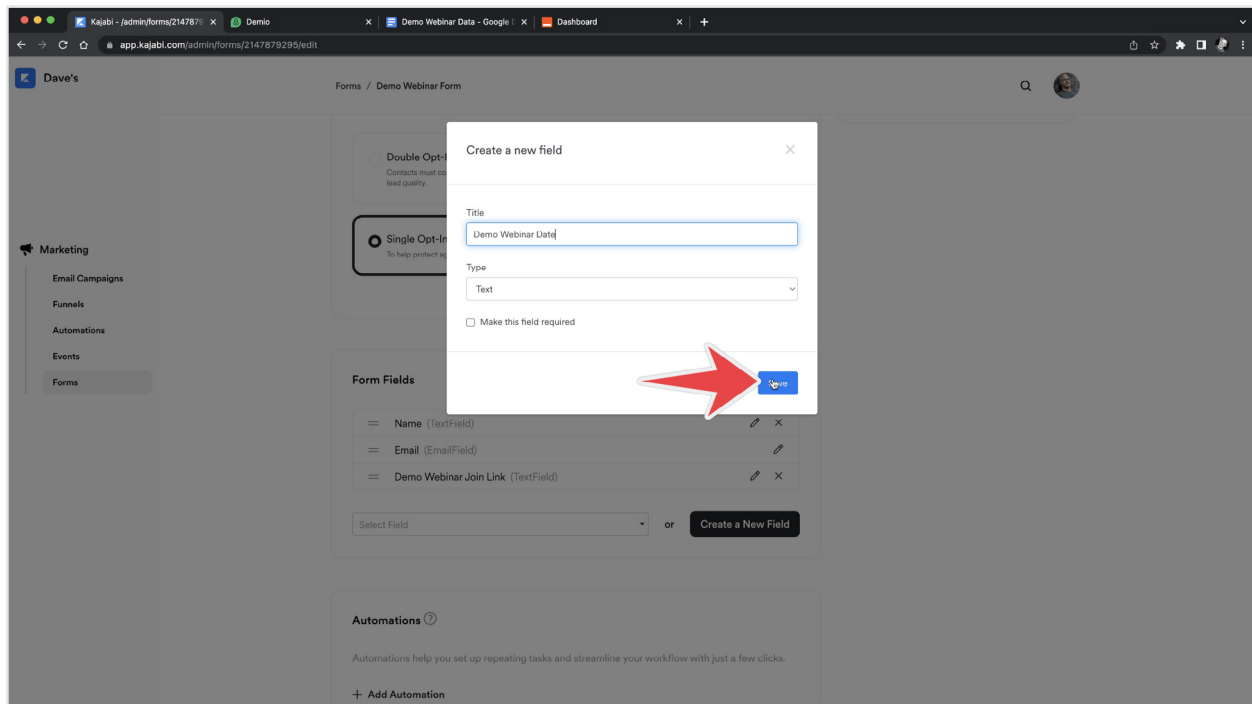
Then go over and click **Create a New Field**:

The screenshot shows the Kajabi Forms editor for a form titled "Demo Webinar Form". The interface includes a left sidebar with navigation options: Marketing, Email Campaigns, Funnels, Automations, Events, and Forms. The main content area is divided into sections: "Double Opt-In (Recommended)" with a sub-option "Single Opt-In", "Form Fields" containing a list of fields (Name, Email, Demo Webinar Join Link) and a "Create a New Field" button highlighted with a red arrow, and "Automations" with an "Add Automation" button.

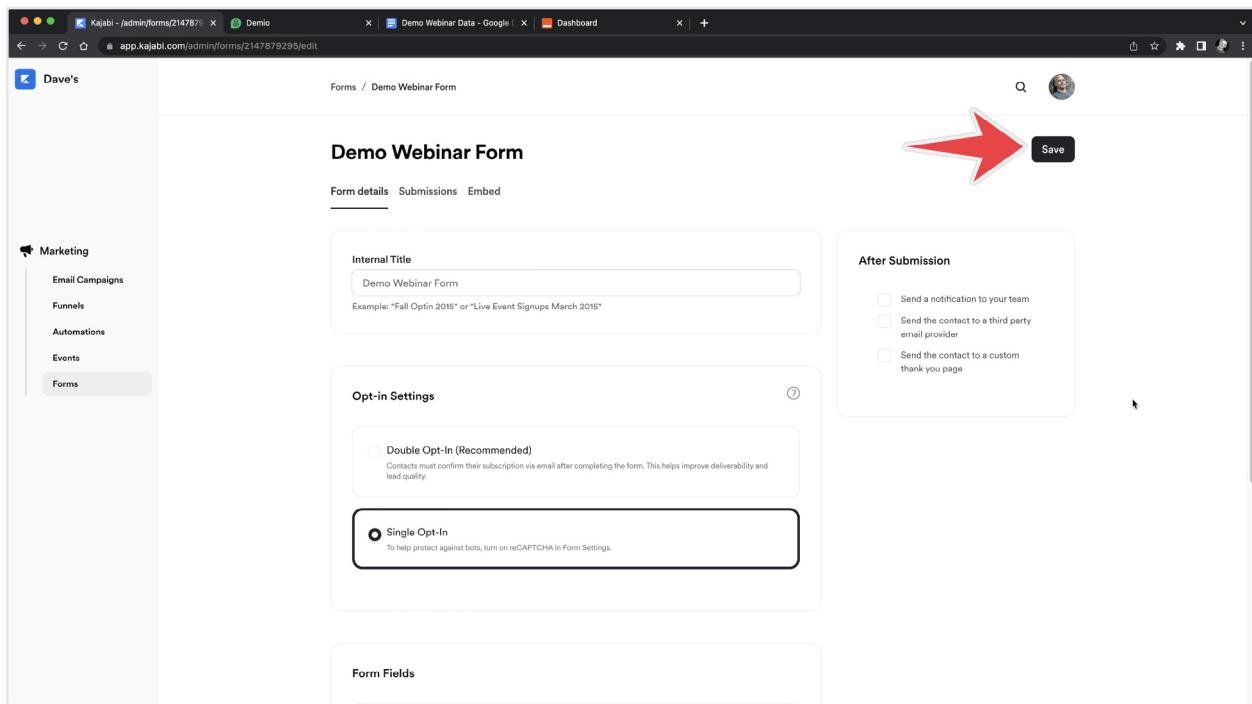
Because this is for your webinar date, enter a name that reflects that. For instance, I've entered Demo Webinar Date:

The screenshot shows the "Create a new field" dialog box open over the "Create a New Field" button in the previous screenshot. The dialog box has a "Title" field with the text "Demo Webinar Date" entered, a "Type" dropdown menu set to "Text", and a checkbox for "Make this field required" which is unchecked. A "Save" button is at the bottom right of the dialog box. A red arrow points to the "Title" field.

Then go down and click on **Save**:

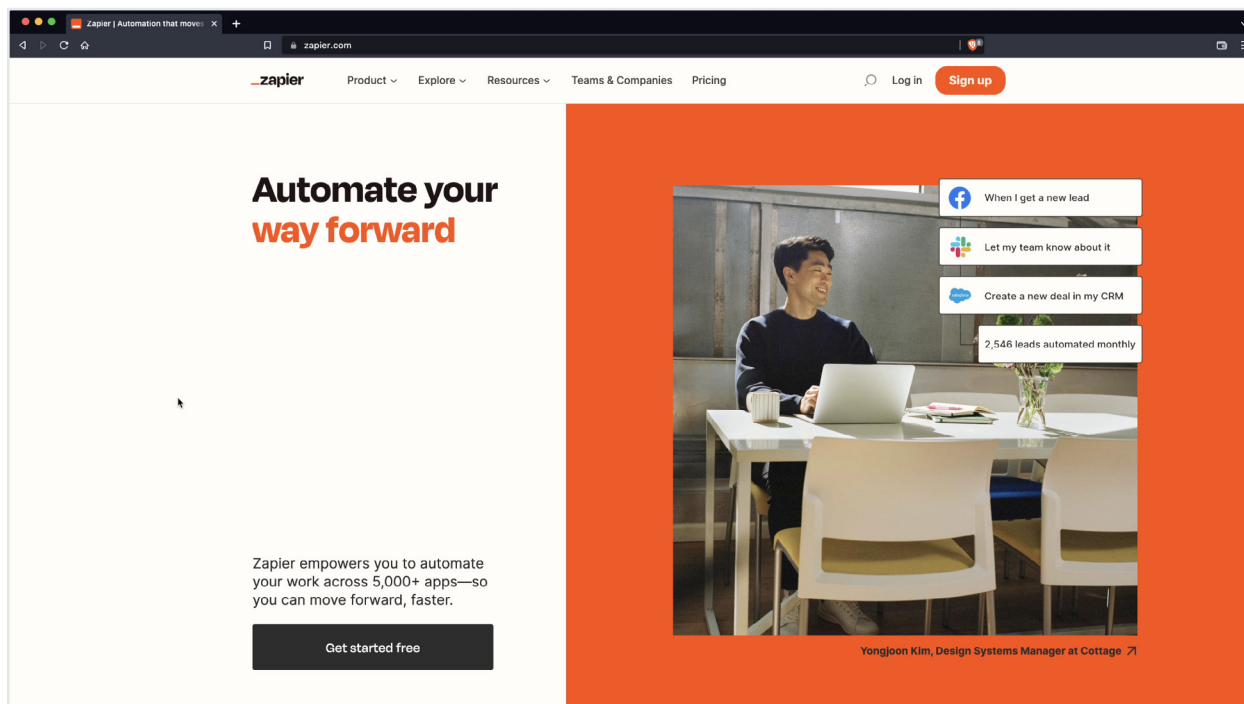


Then scroll up and in the upper right hand corner of the screen, click on **Save**:

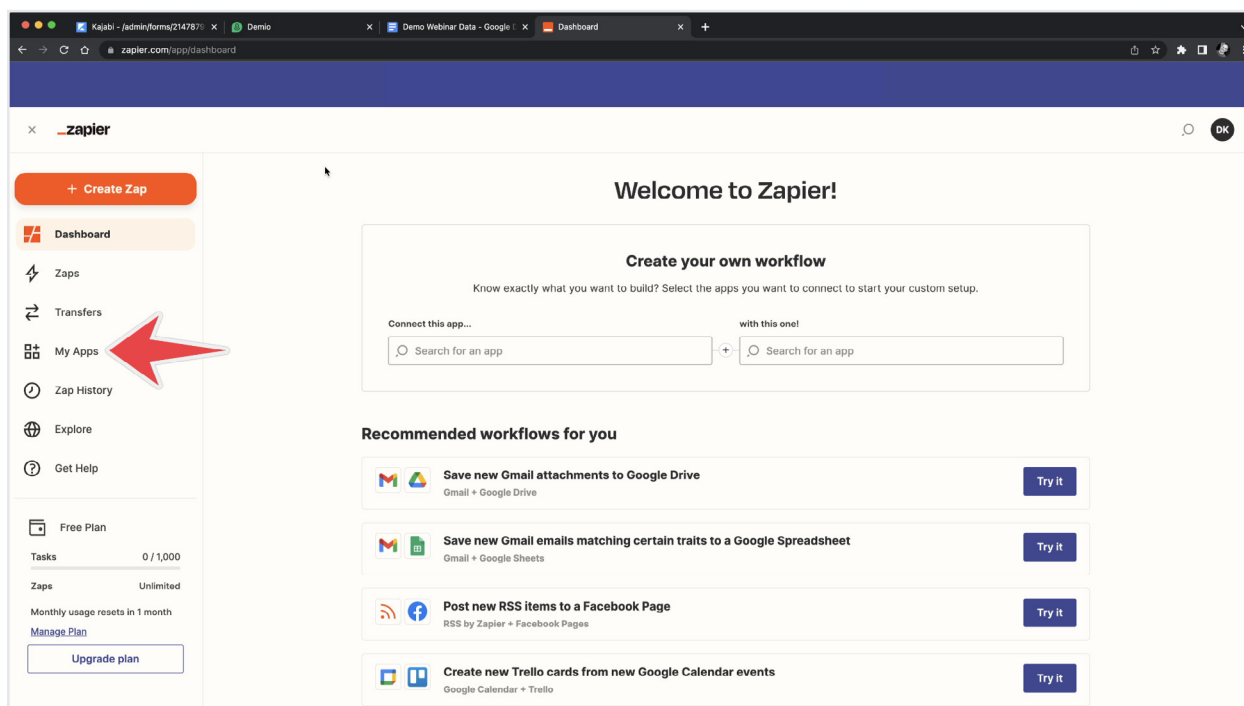


And that's it. You're done in Kajabi, at least for the moment.

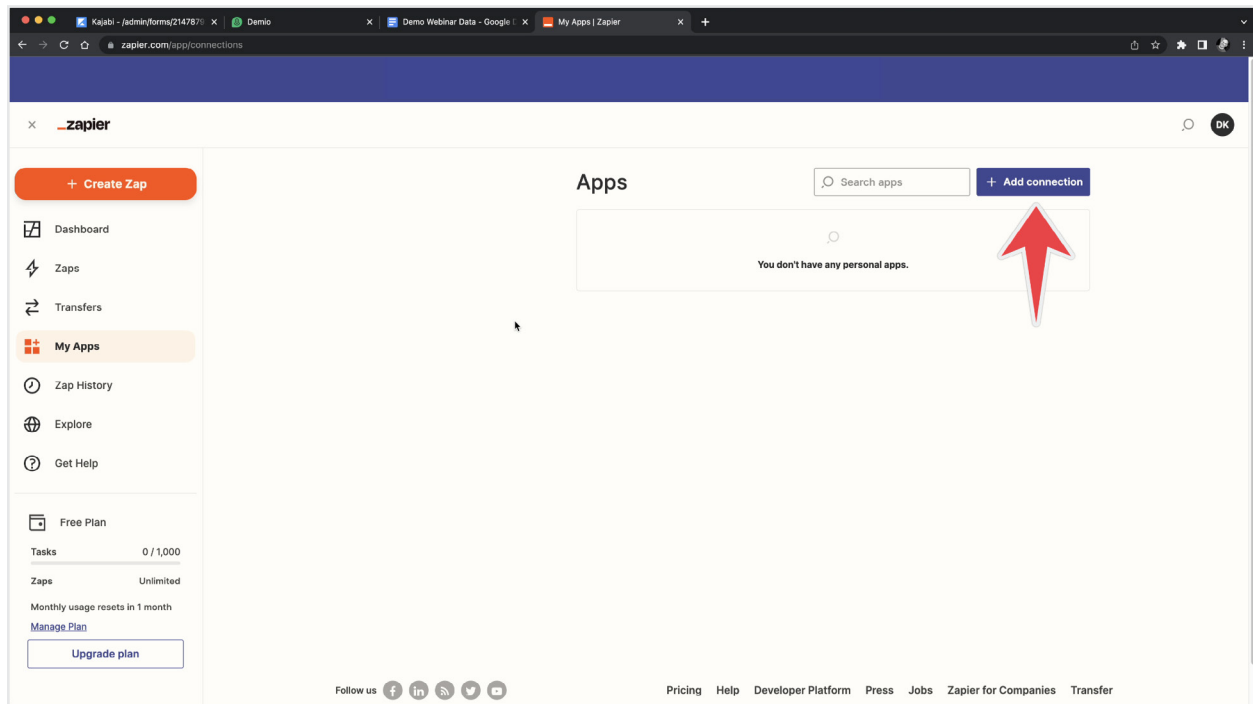
Next, you're going to use a free service called Zapier to set up your integration between Demio and Kajabi. Go to zapier.com and create a free account:



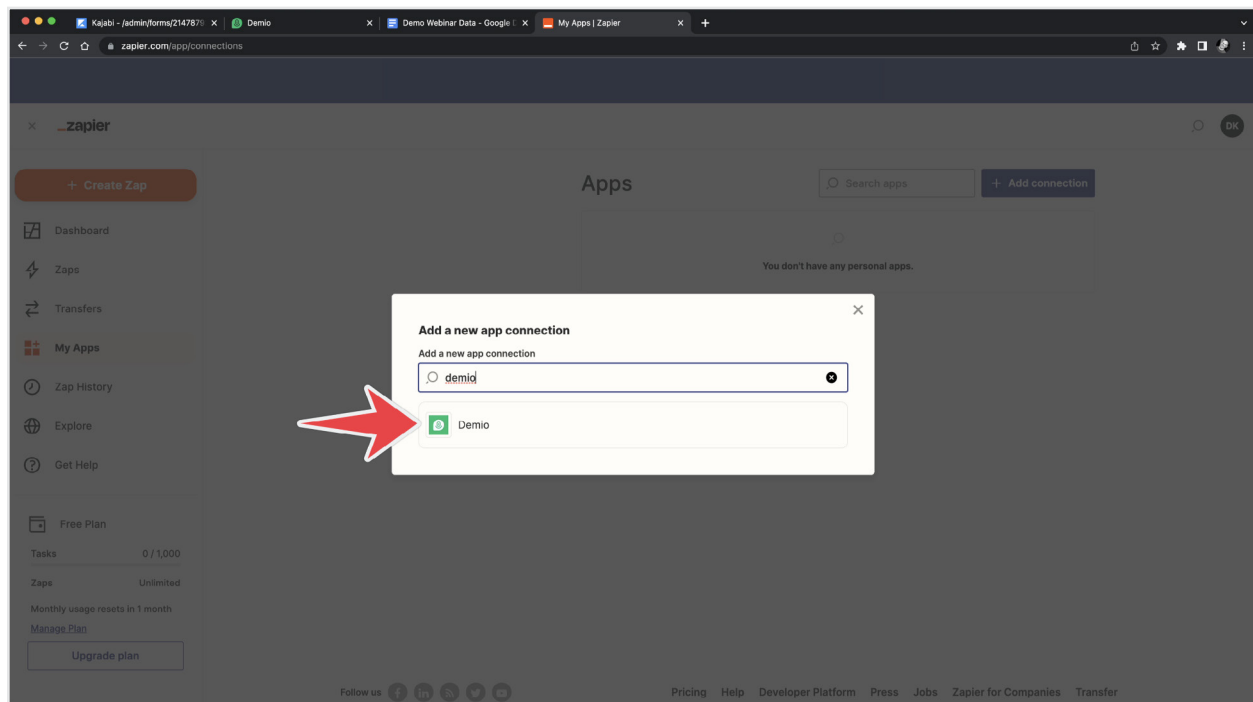
After logging in to your Zapier account, in the side panel to the left, go down and select **My Apps**:



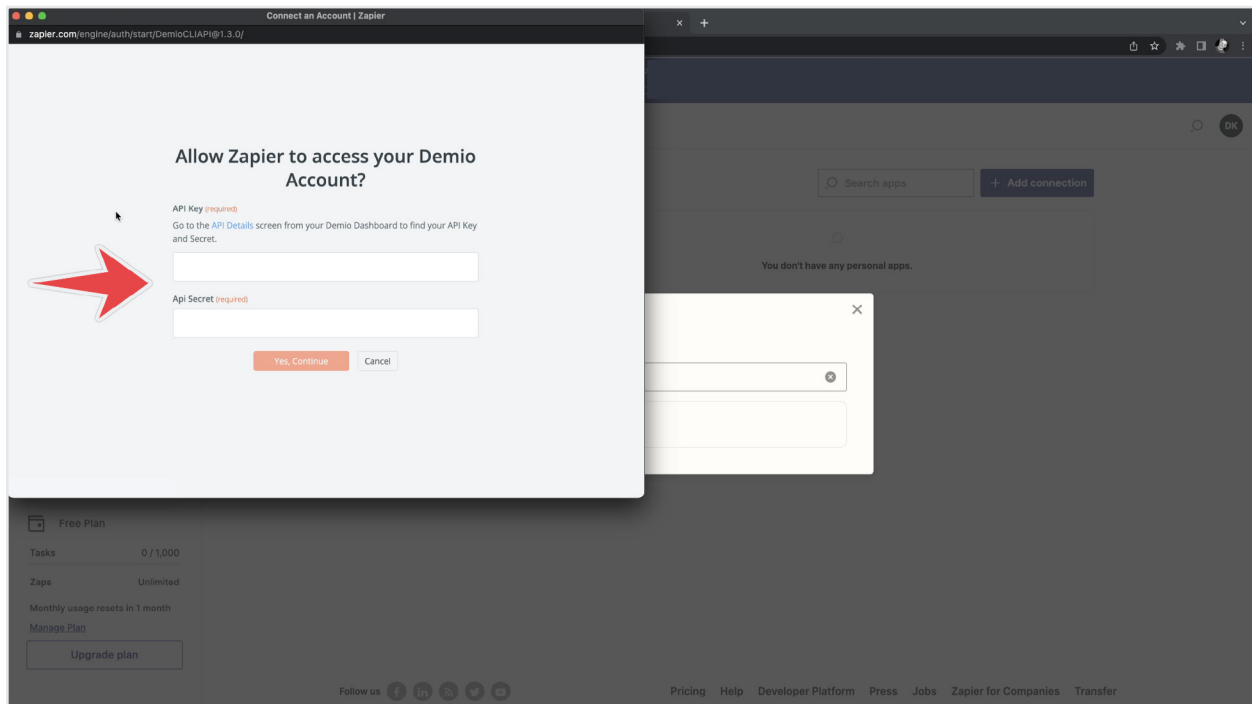
Then go over to the upper right and click on **Add Connection**:



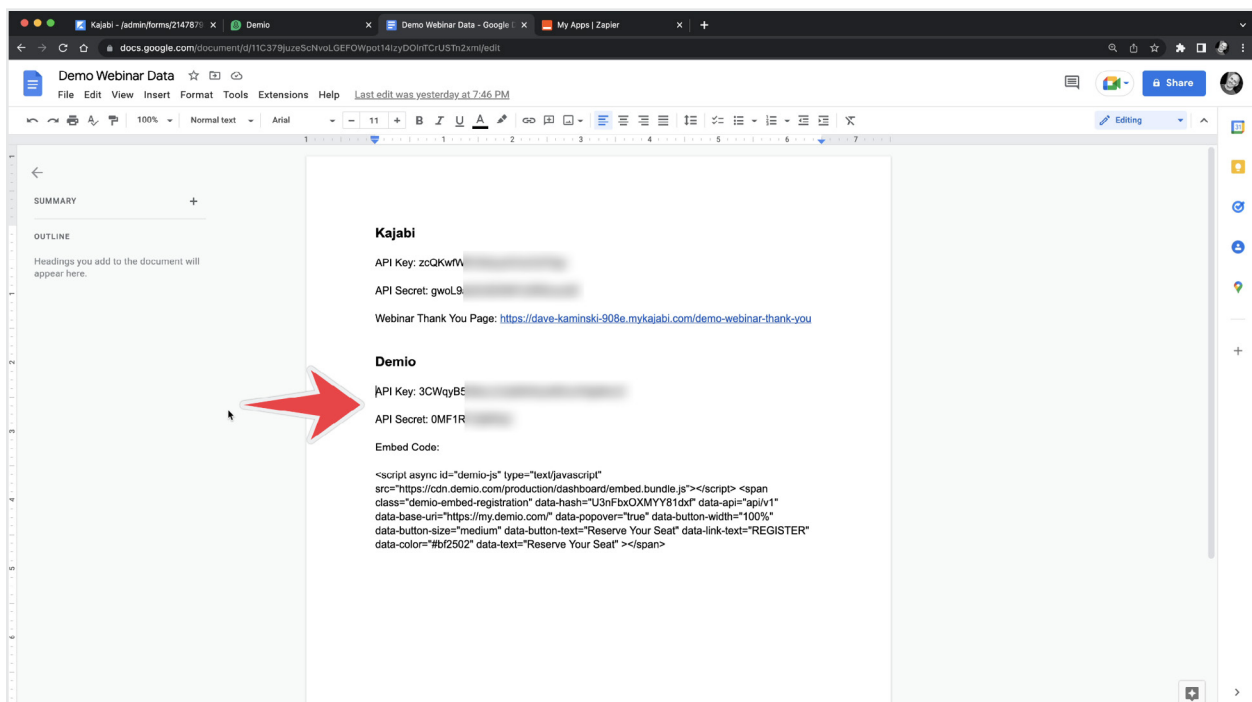
In the search box that appears, type in Demio and then select Demio:

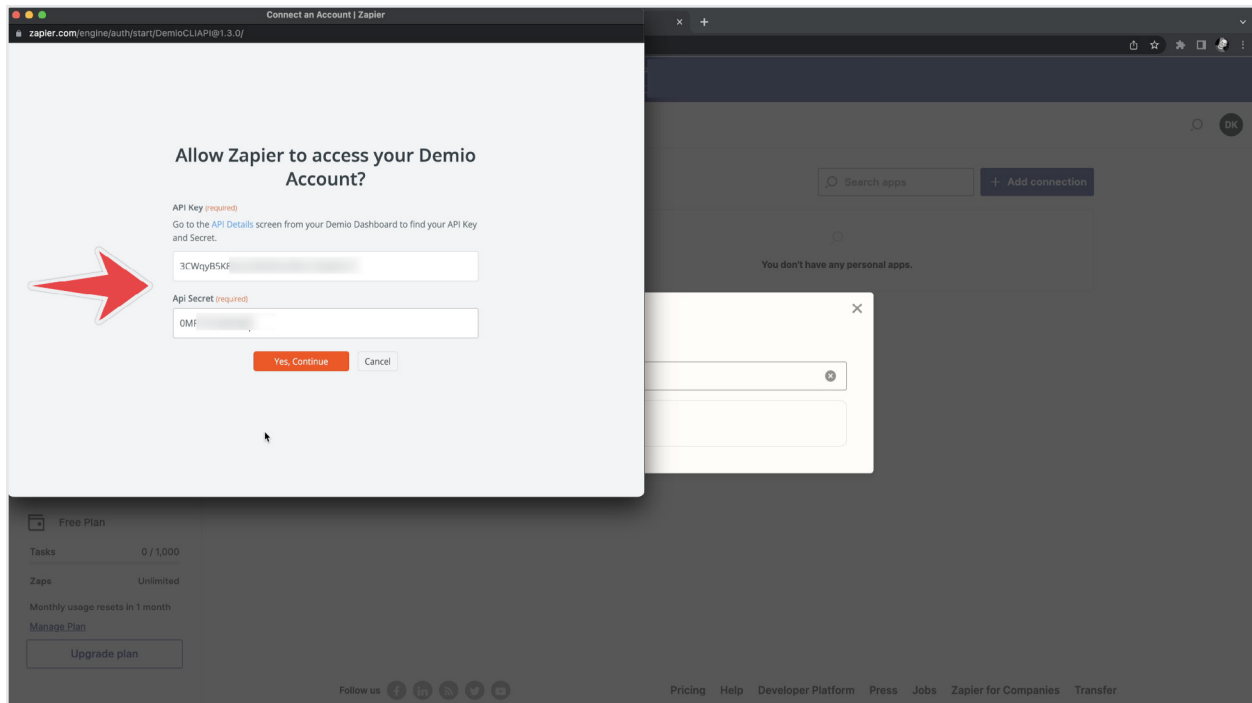


A window will appear asking you to enter your **API key** in your **API** secret for Demio:

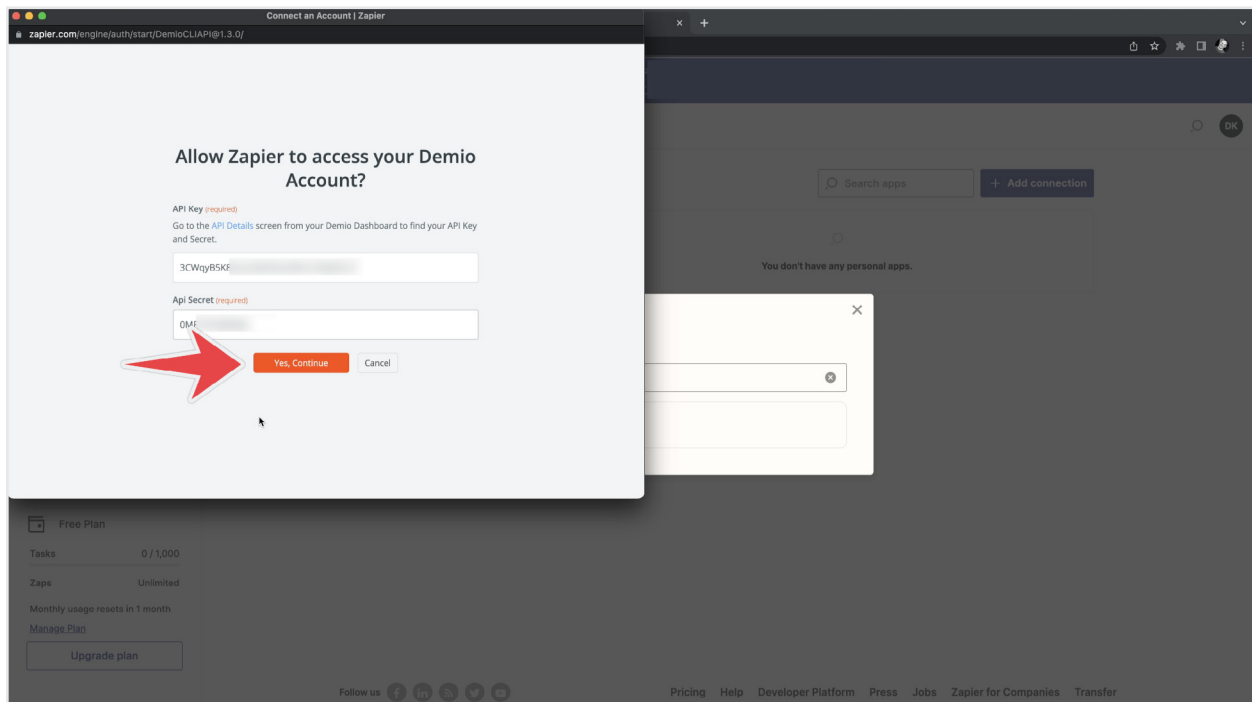


And remember from **Step 1**, you stored those in your Google doc. So go to your Google Doc, copy the keys and paste them into their places in the Zapier window:

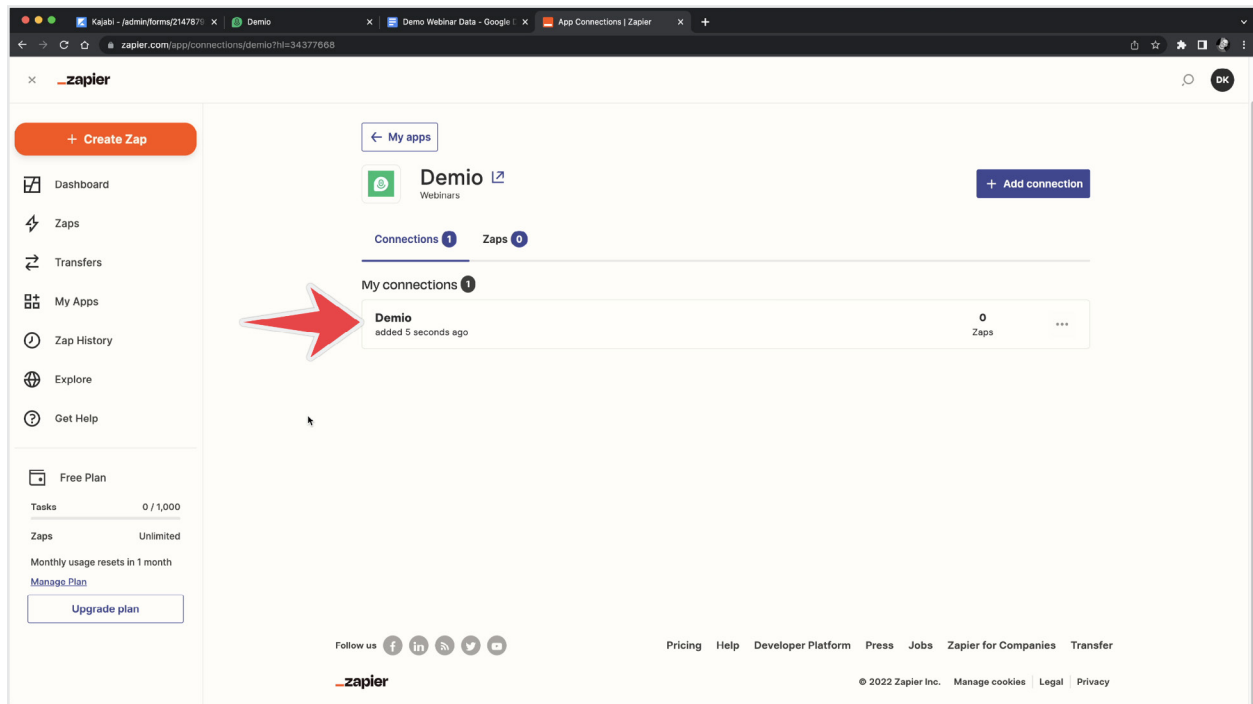




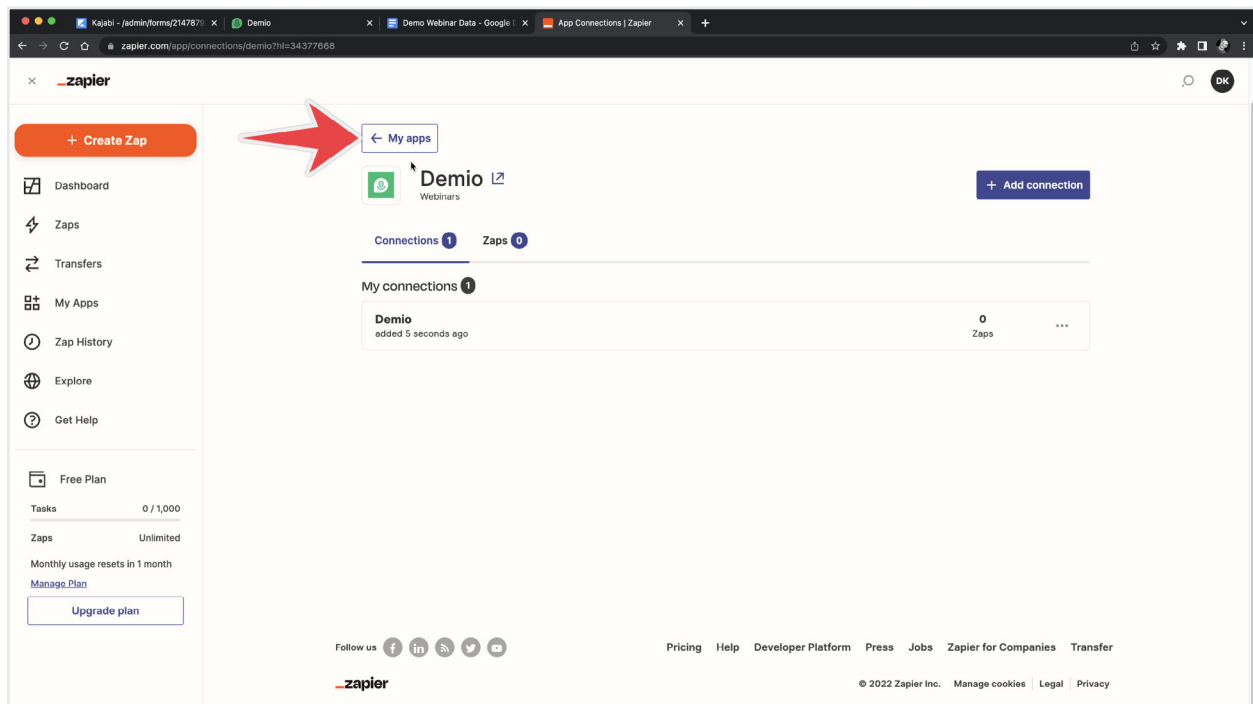
Then **Yes Continue**:



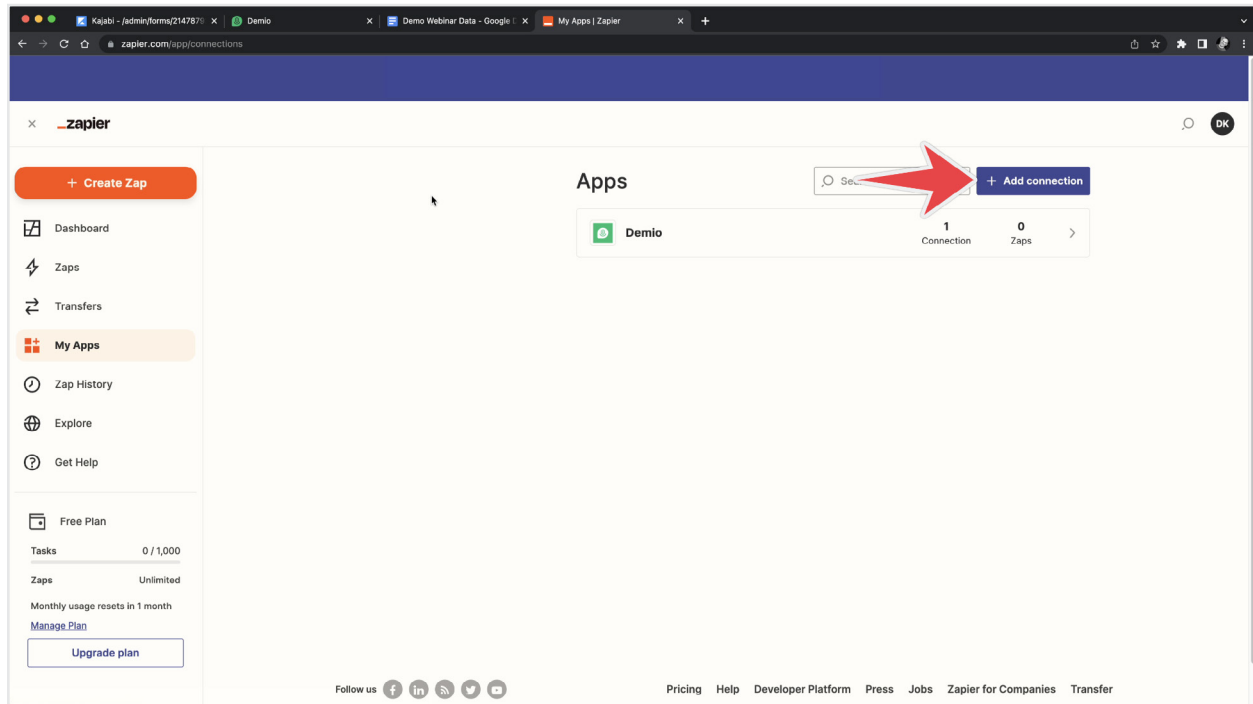
And now you've successfully connected Demio with Zapier:



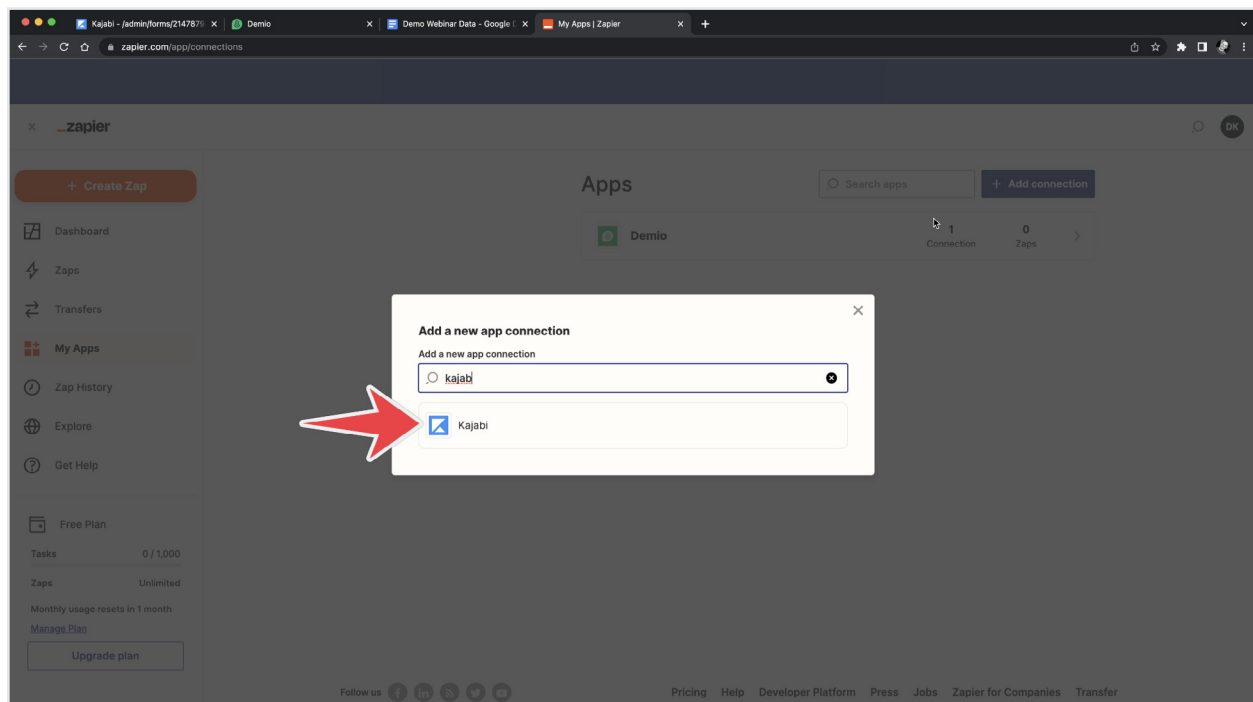
Now go up and click on **My Apps**:



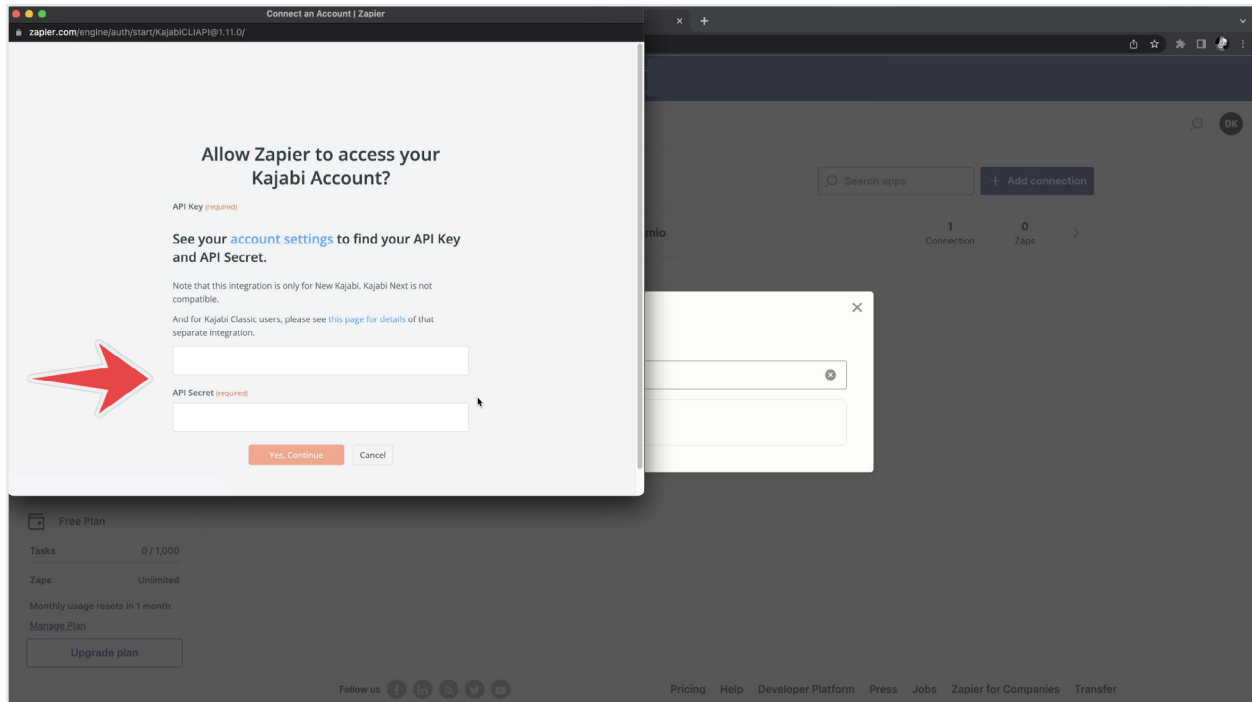
You'll see Demio listed, but now go over once again and click on **Add Connection**:



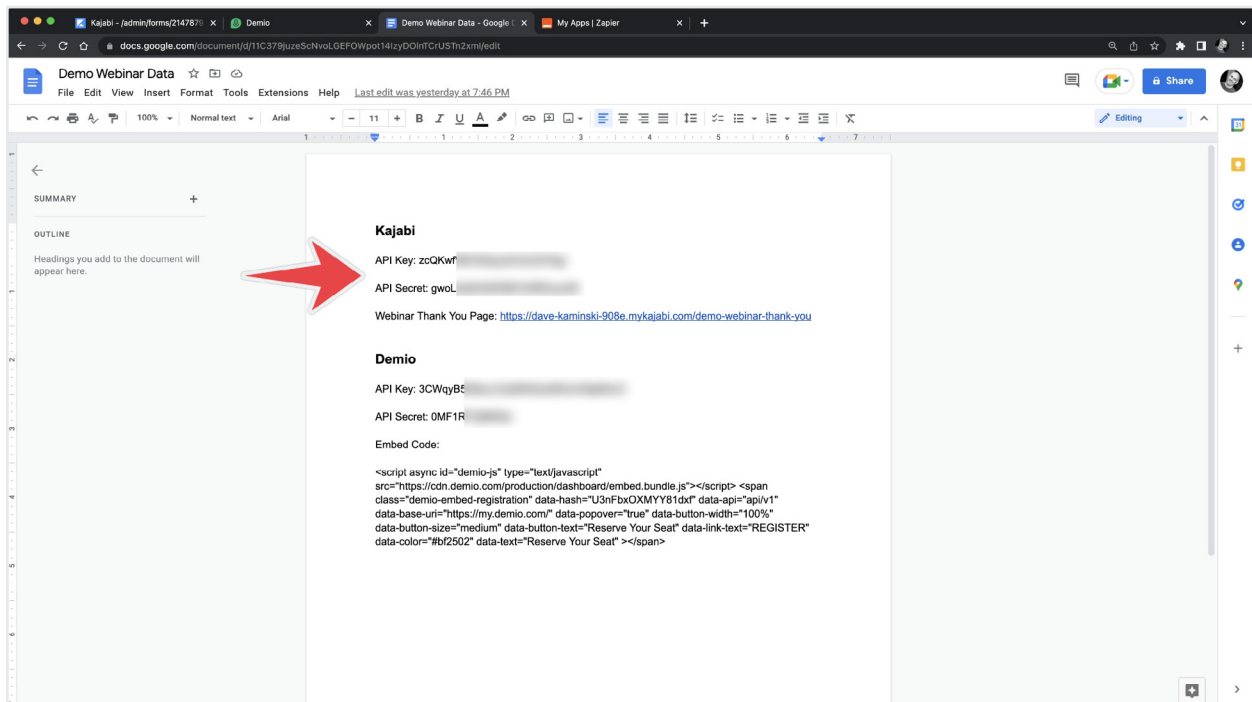
This time, type in Kajabi and then select it:

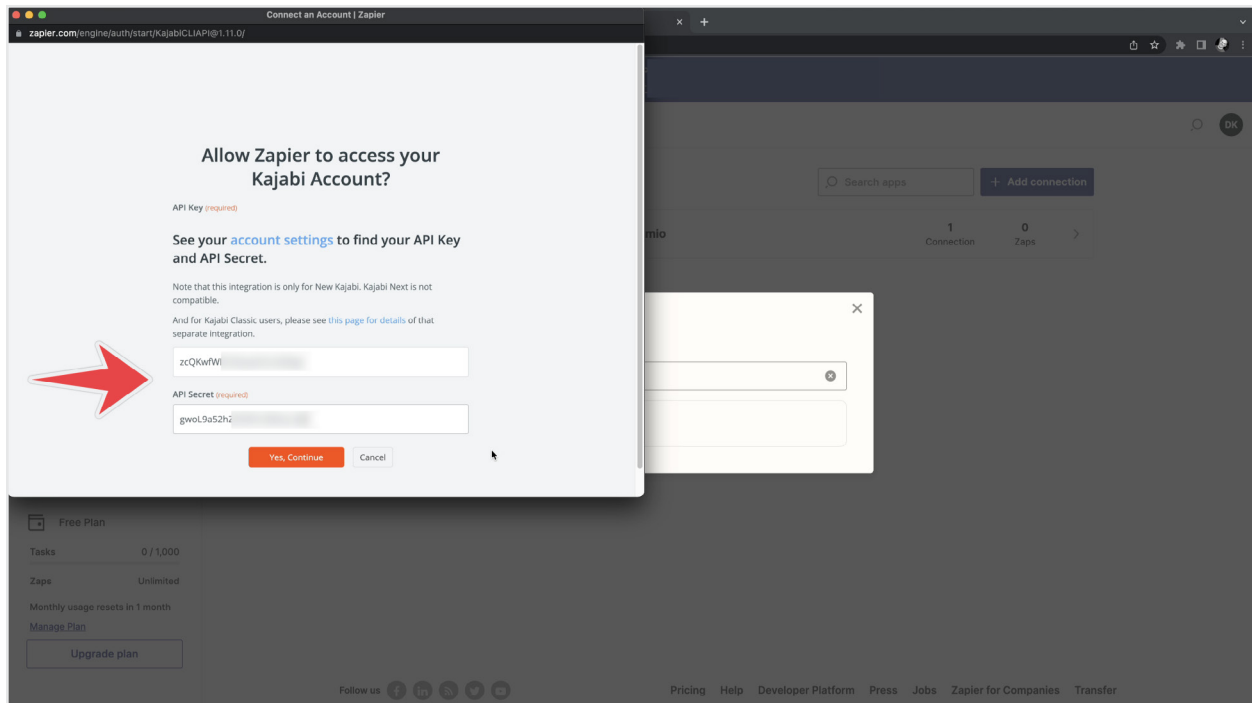


Once again, you'll see the Zapier window asking for the **API key** and the **API secret** for Kajabi:

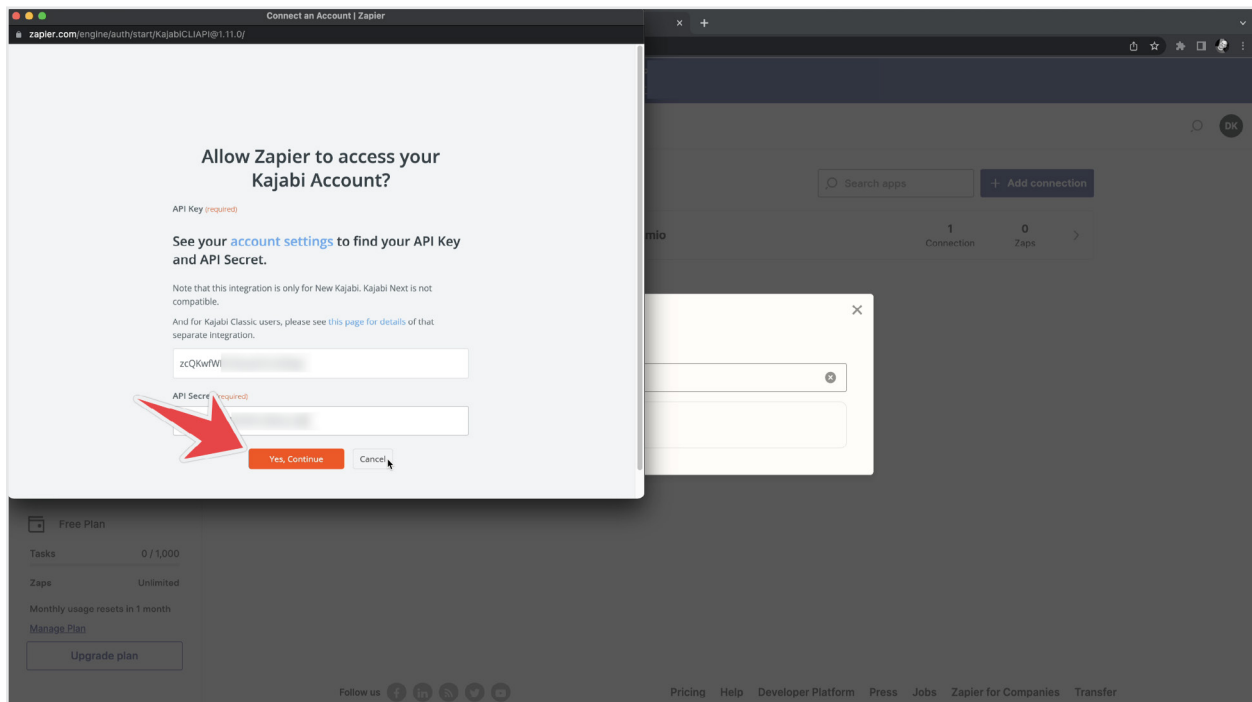


Remember in Step 1, you stored those in your Google doc. So go to your Google Doc, copy them and then paste them into the window in Zapier:

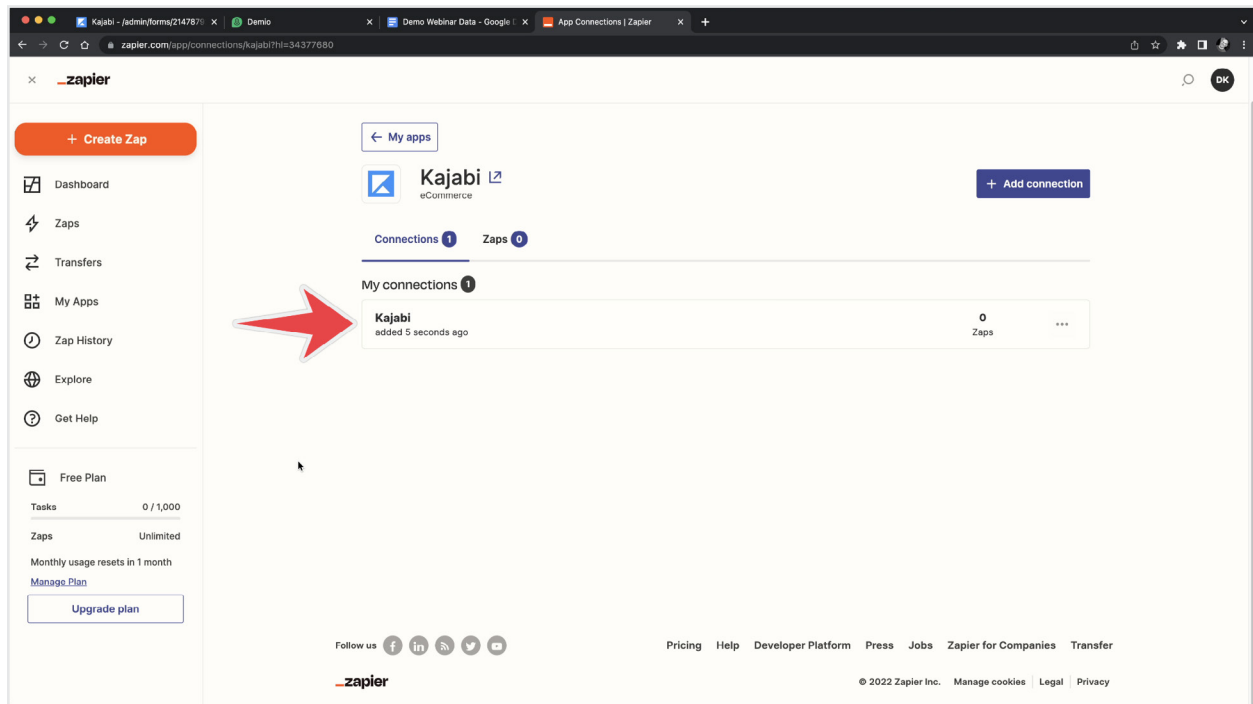




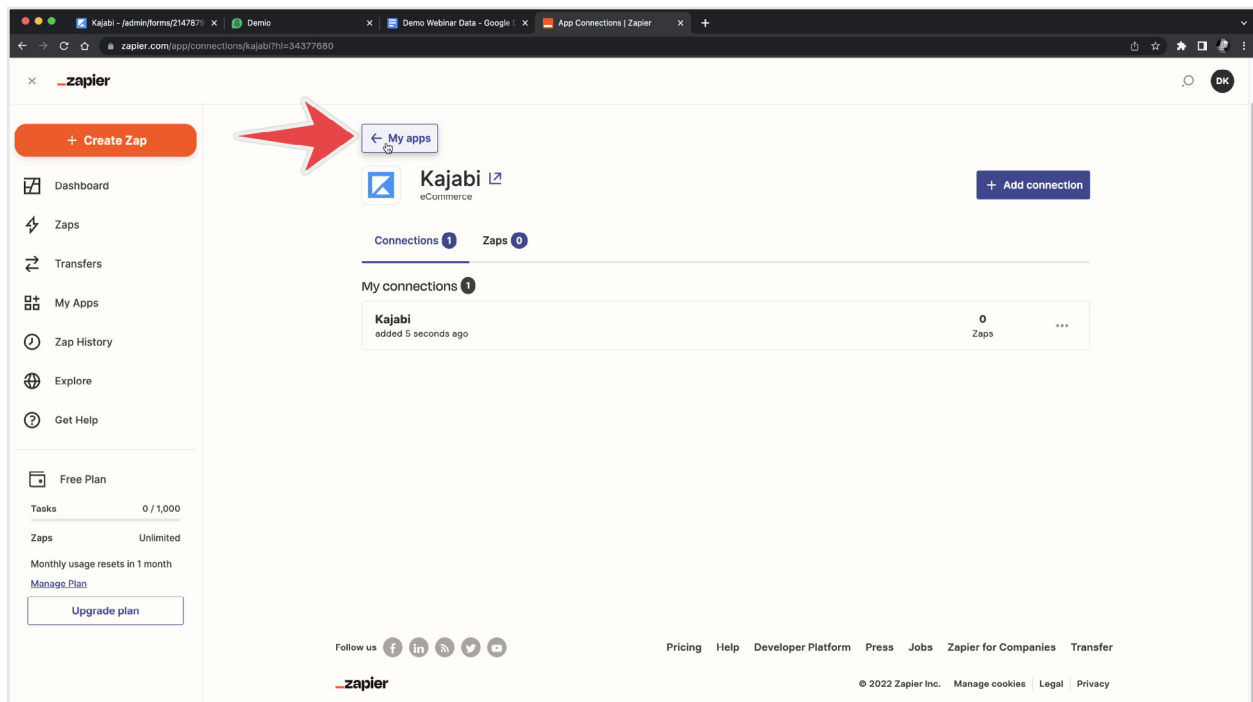
Then click **Yes Continue**:

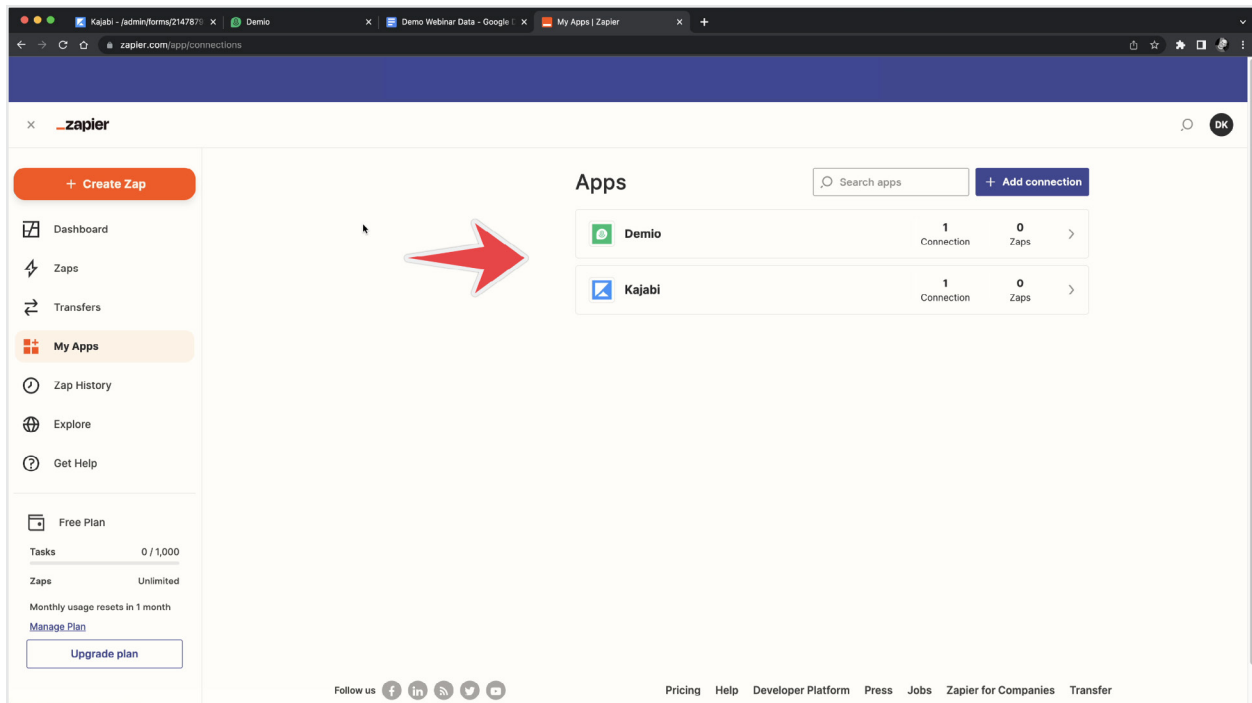


Now Kajabi has been connected with Zapier:



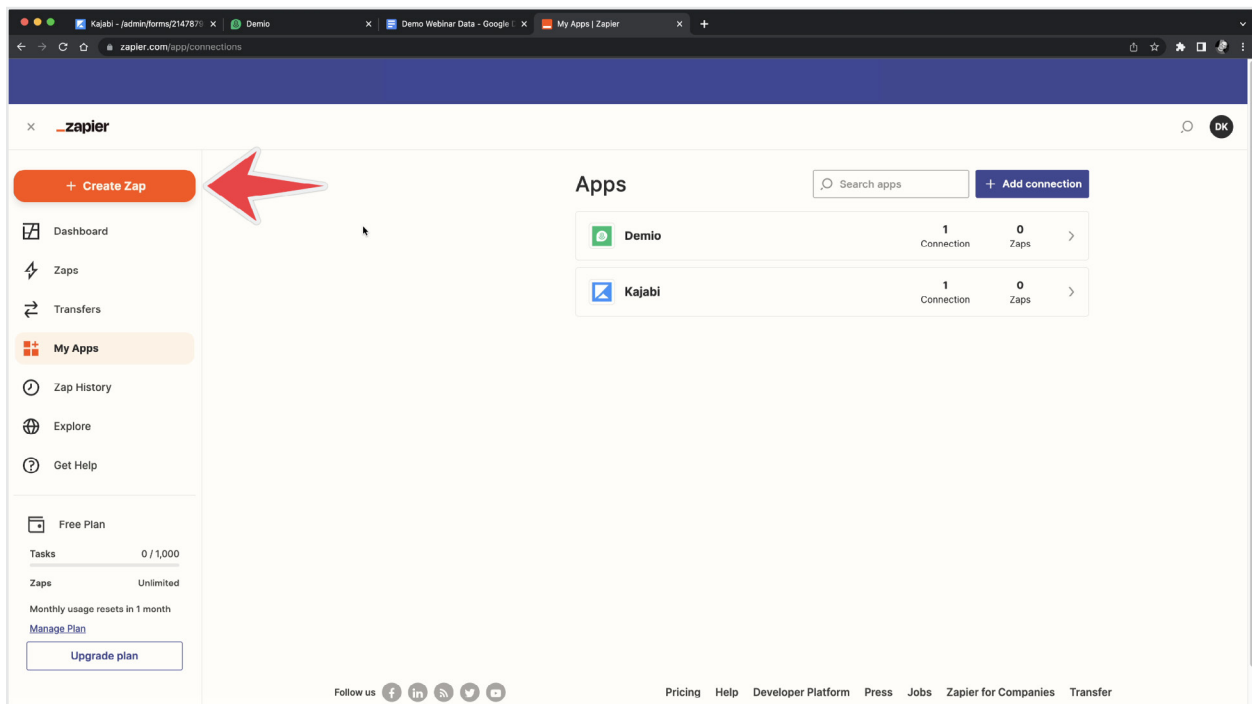
If you go up and click on **My Apps**, you can see both Demio and Kajabi listed:



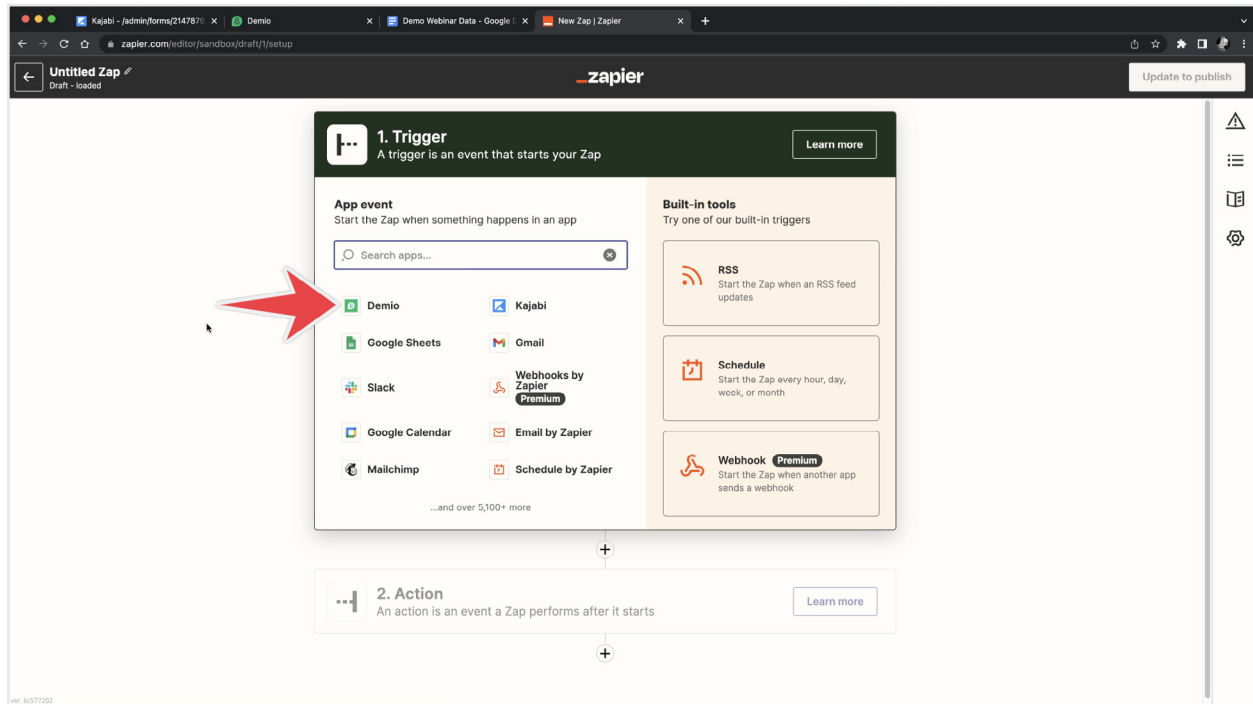


Now, you're going to create what's called a **zap** and this is the connection between Demio and Kajabi, where your webinar registration information gets passed between the two.

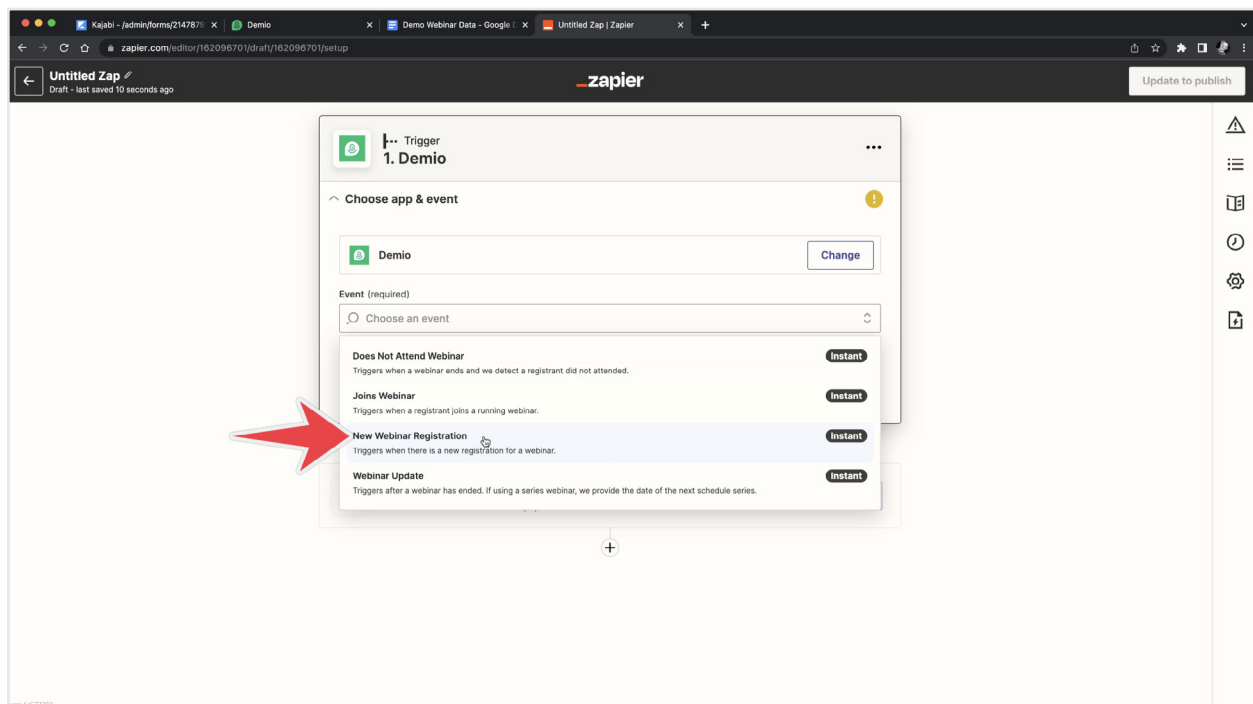
So go over and click the big **Create Zap** button:

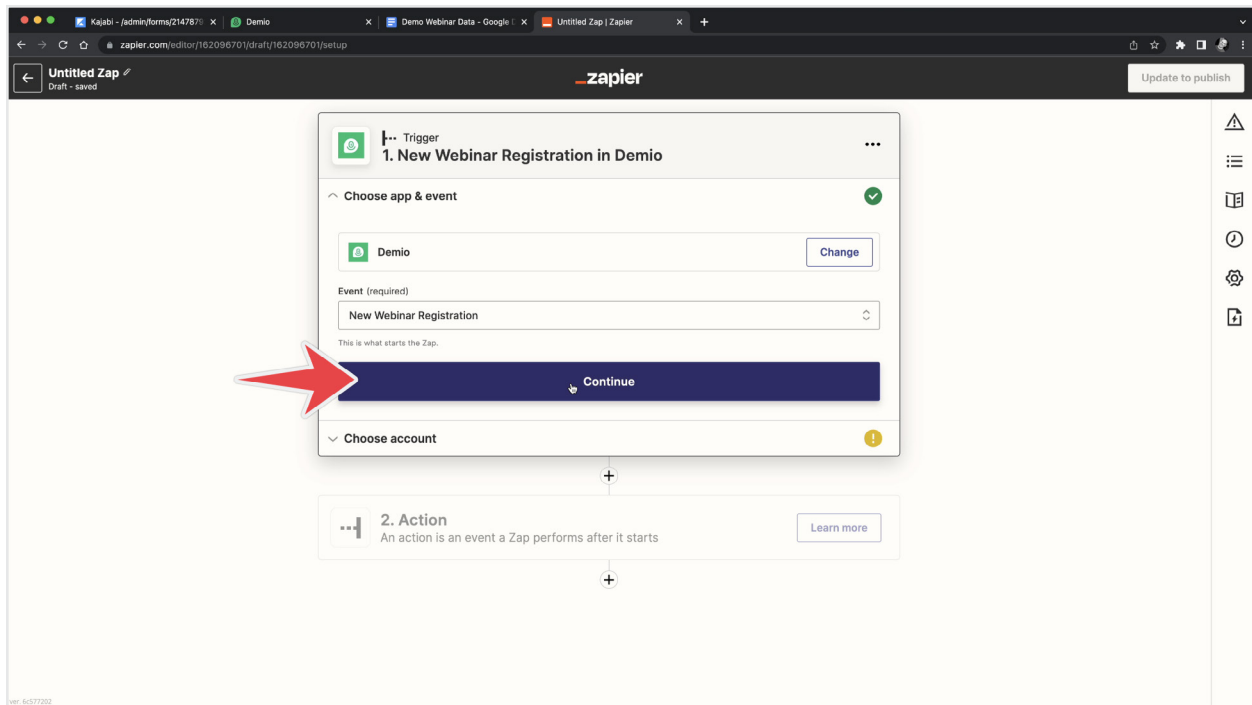


First, you need to set a trigger, and the trigger would be when someone registers for your webinar in Demio. So select Demio:

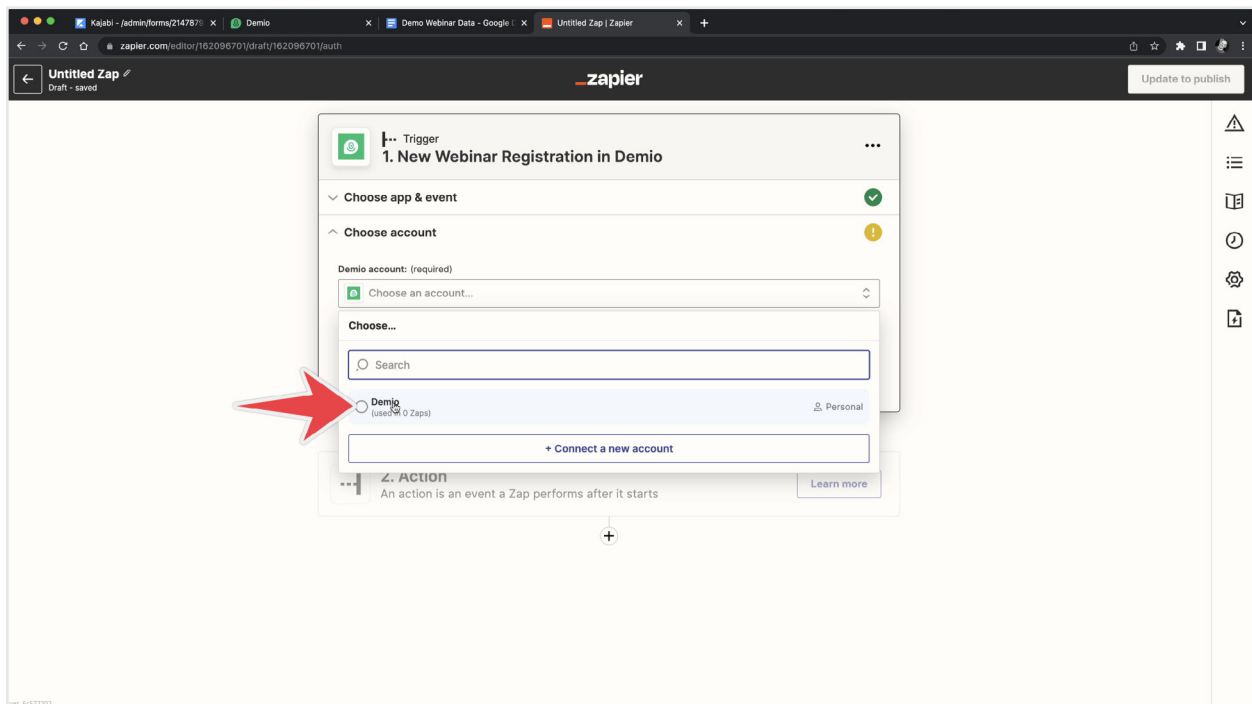


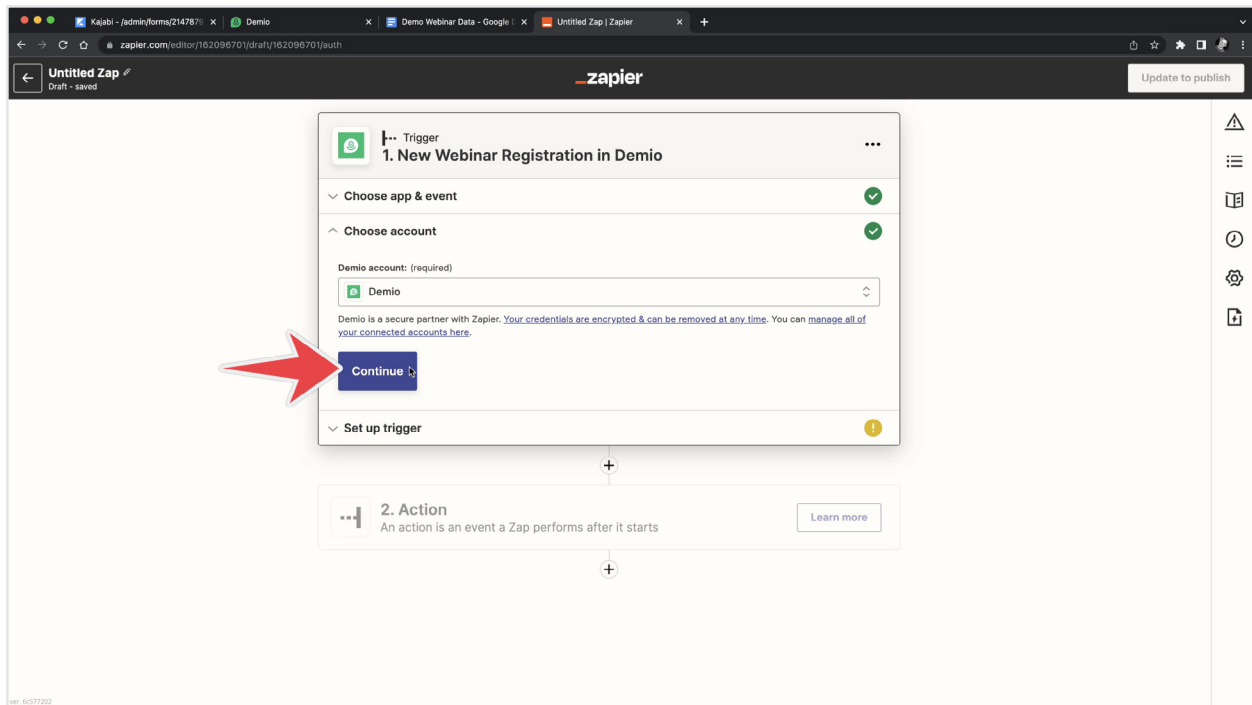
Then choose your event, which would be a **new webinar registration** and then click **Continue**:



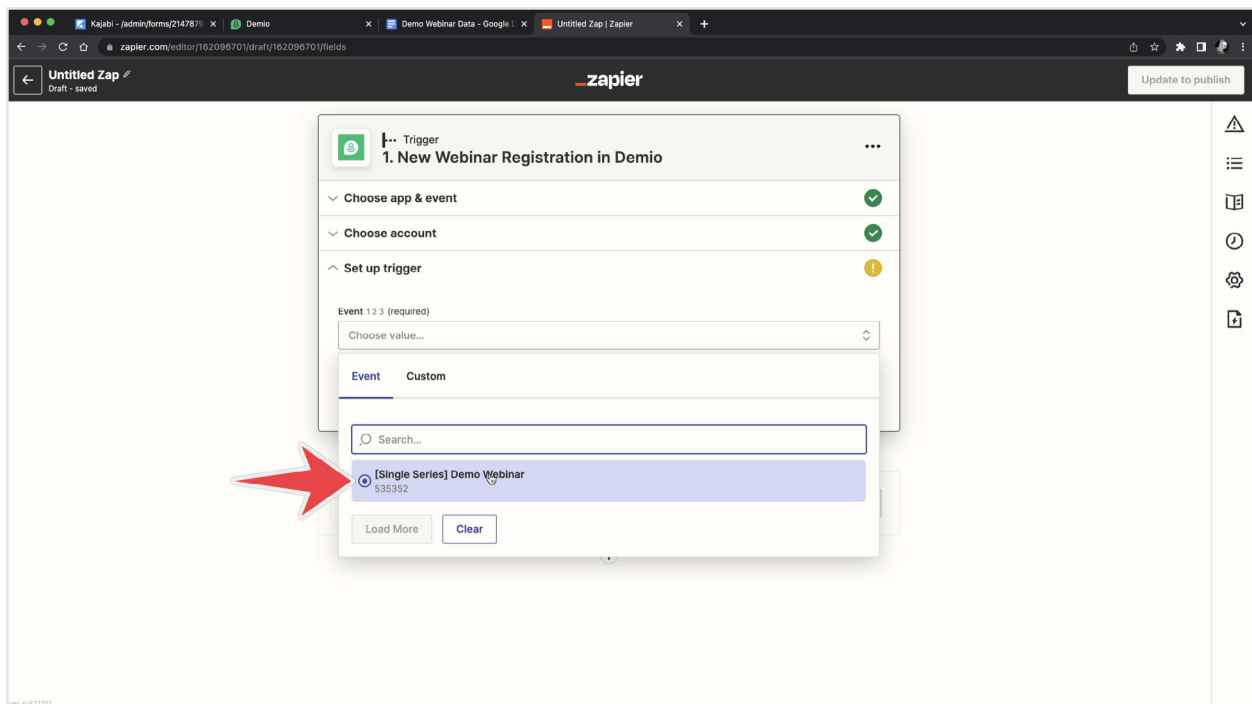


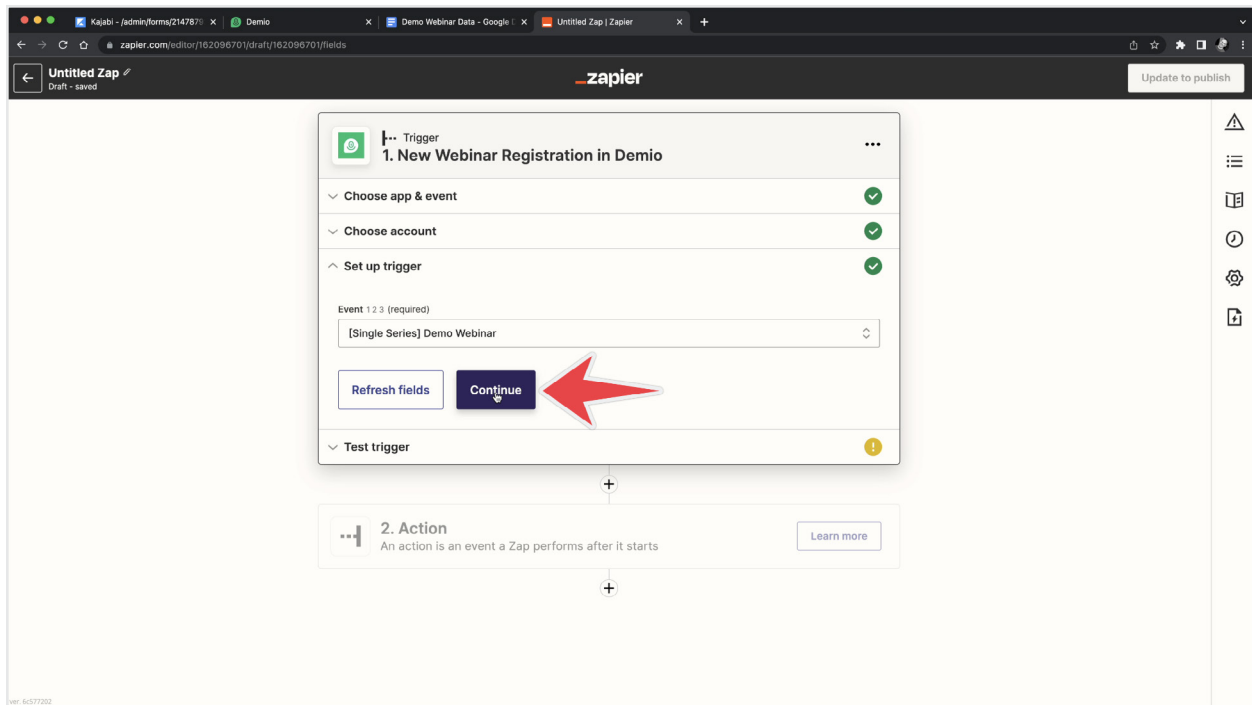
You'll be asked to choose your Demio account. Select it and click **Continue**:



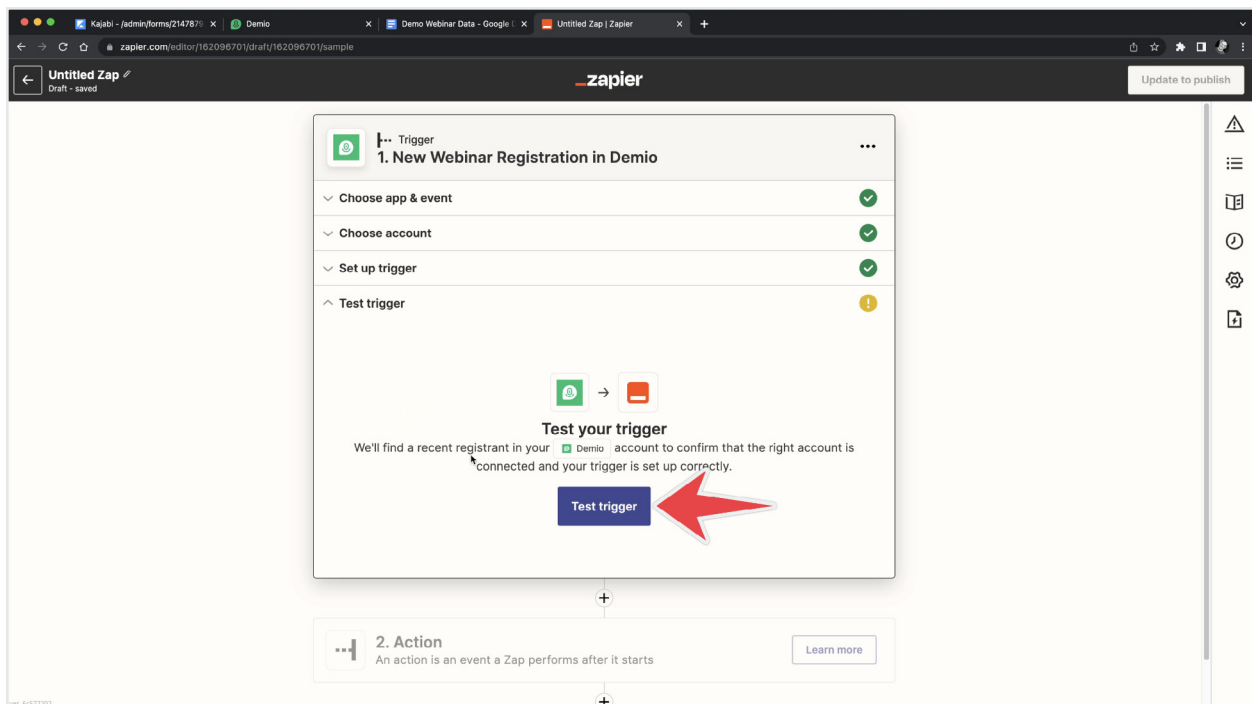


Next, it will ask you to choose an event. Select your webinar event and click **Continue**:

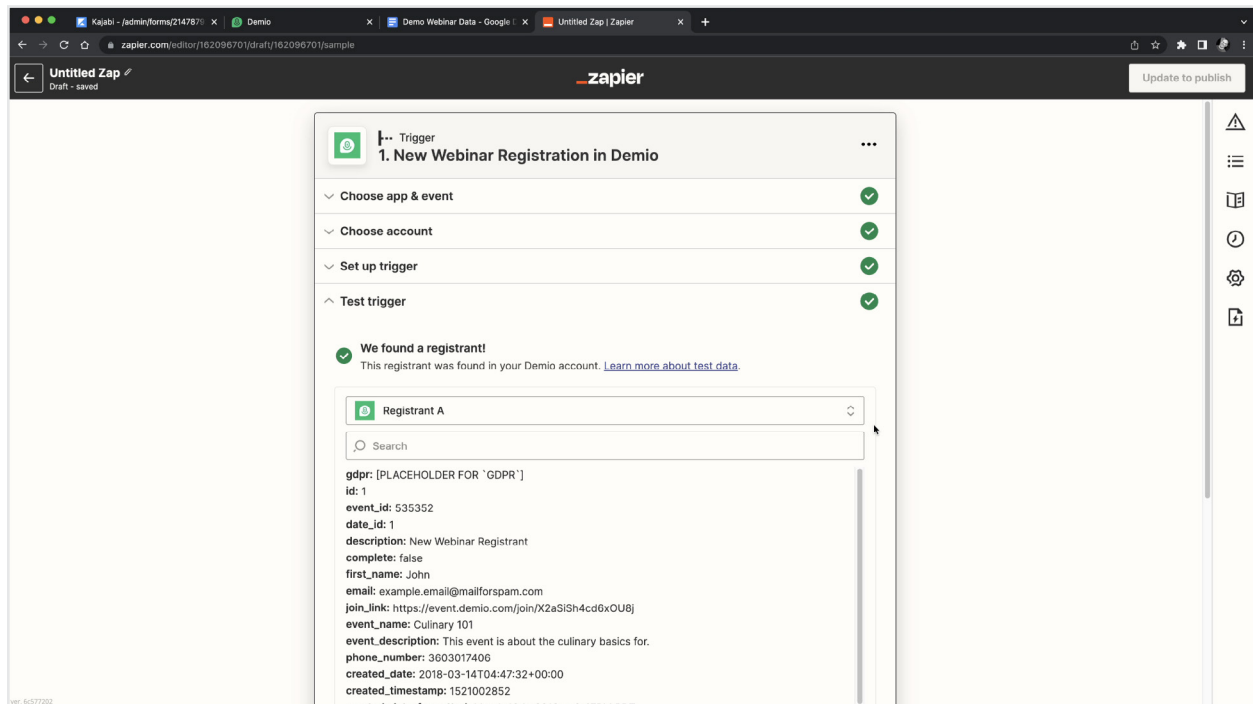




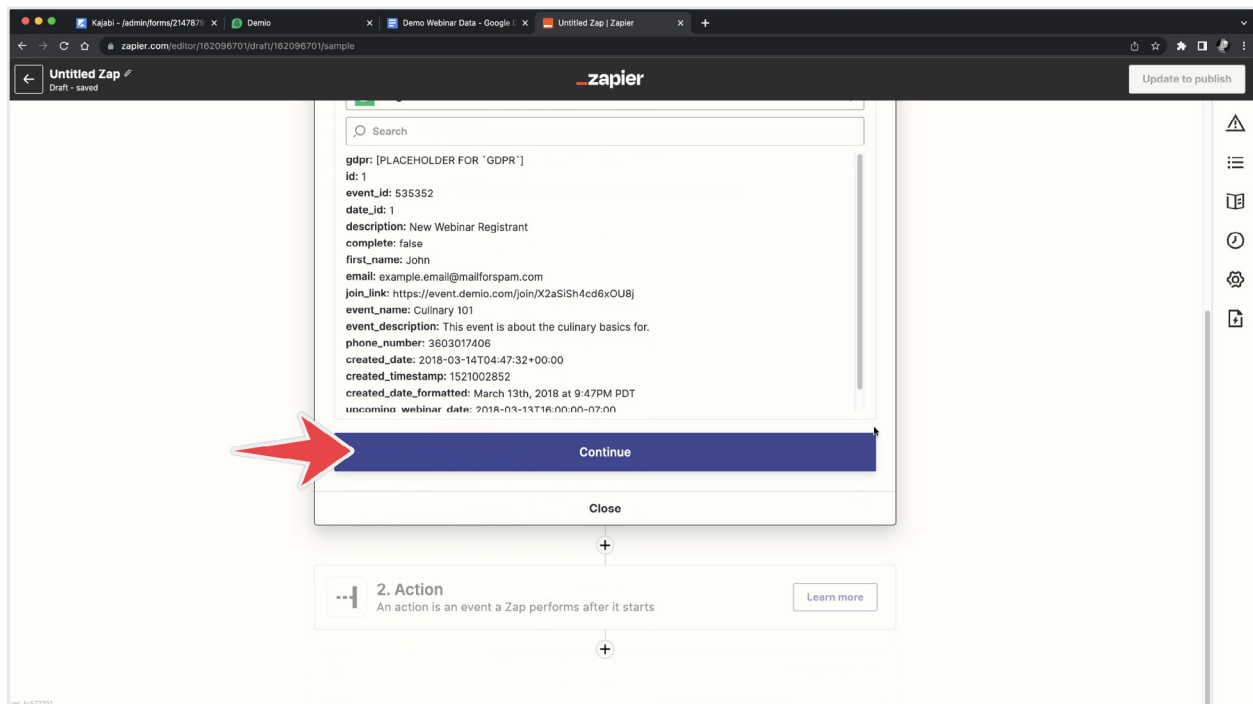
Now you will be asked to perform a test to verify that Zapier can connect with Demio. Click on **Test Trigger**:



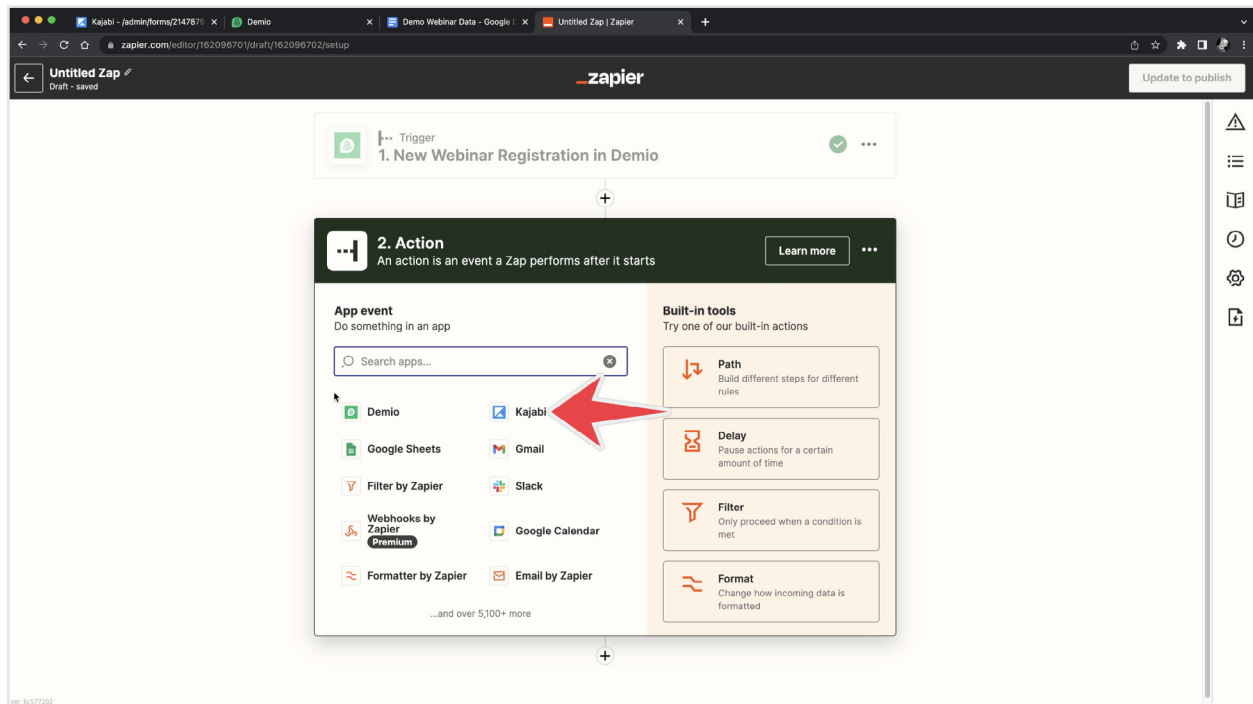
If the test is successful, you'll see the results:



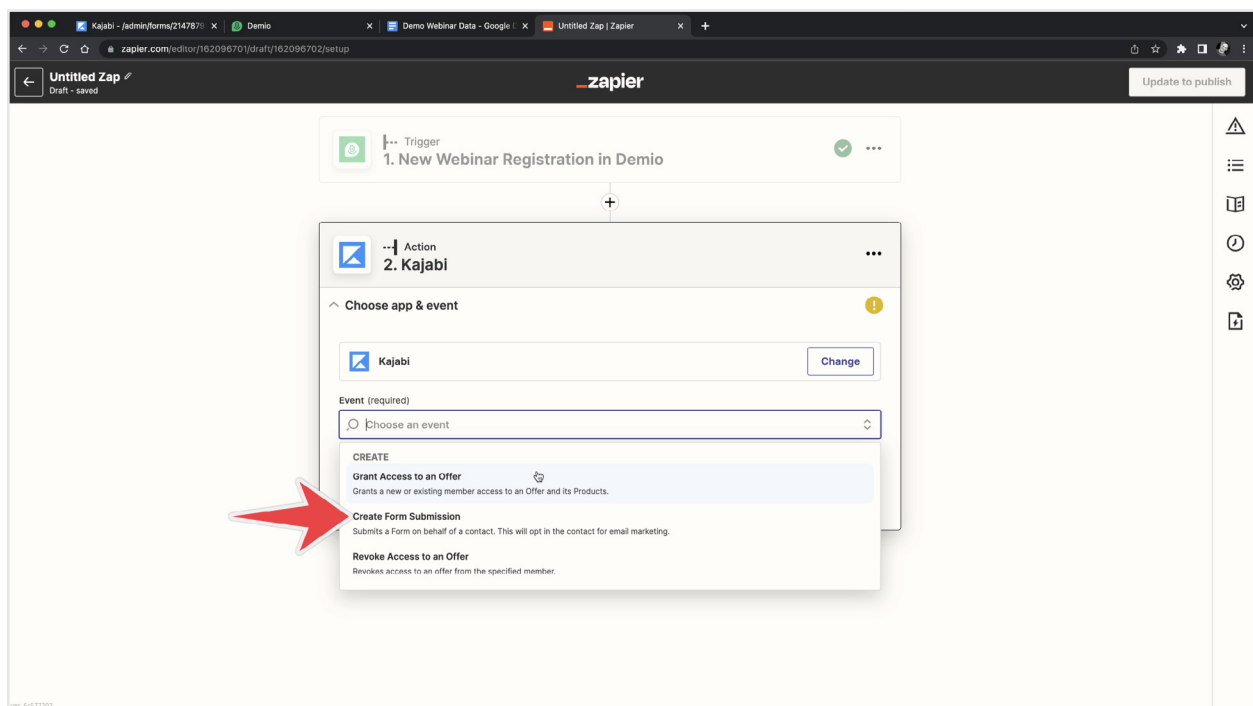
Scroll down and click **Continue**:

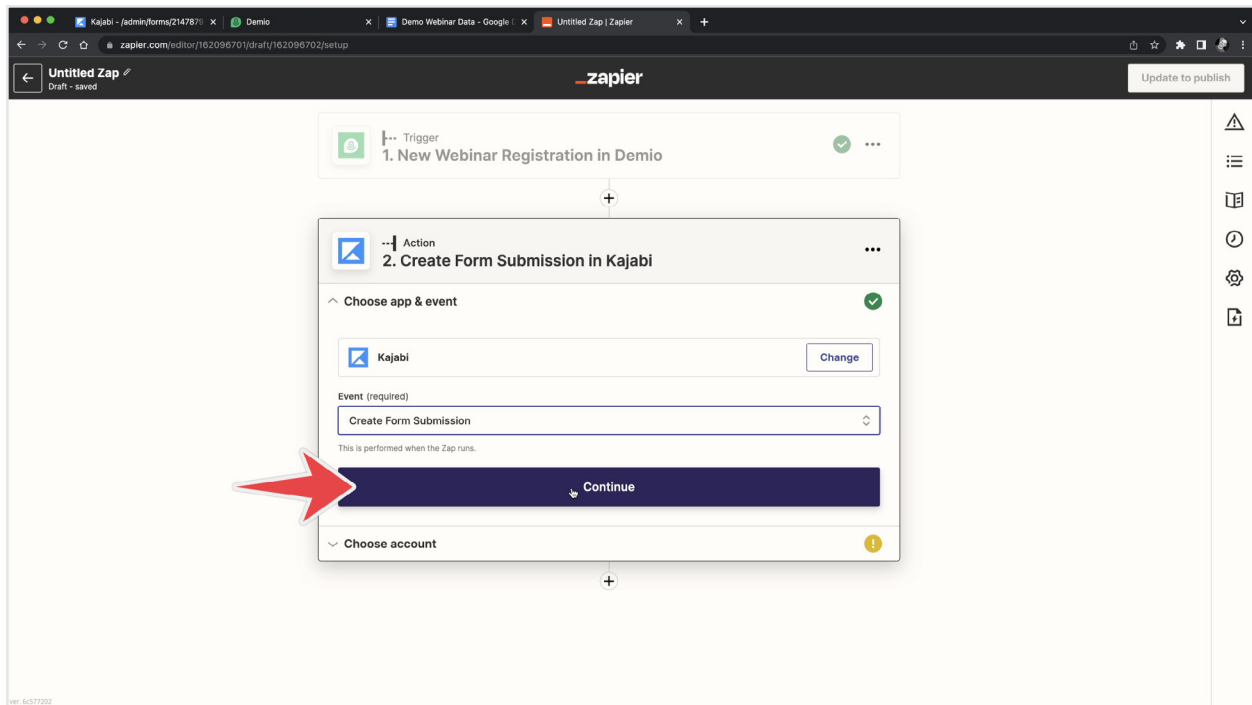


Now you need to set the action and the action will be Kajabi. So click on **Kajabi**:

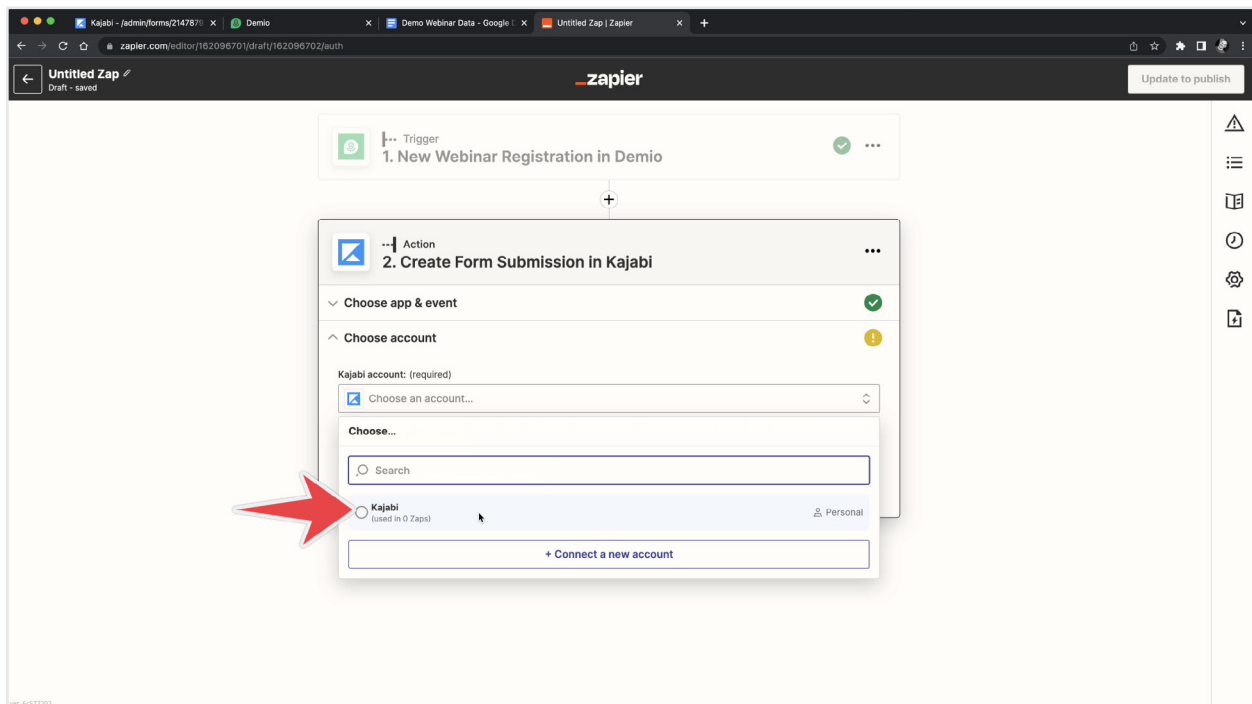


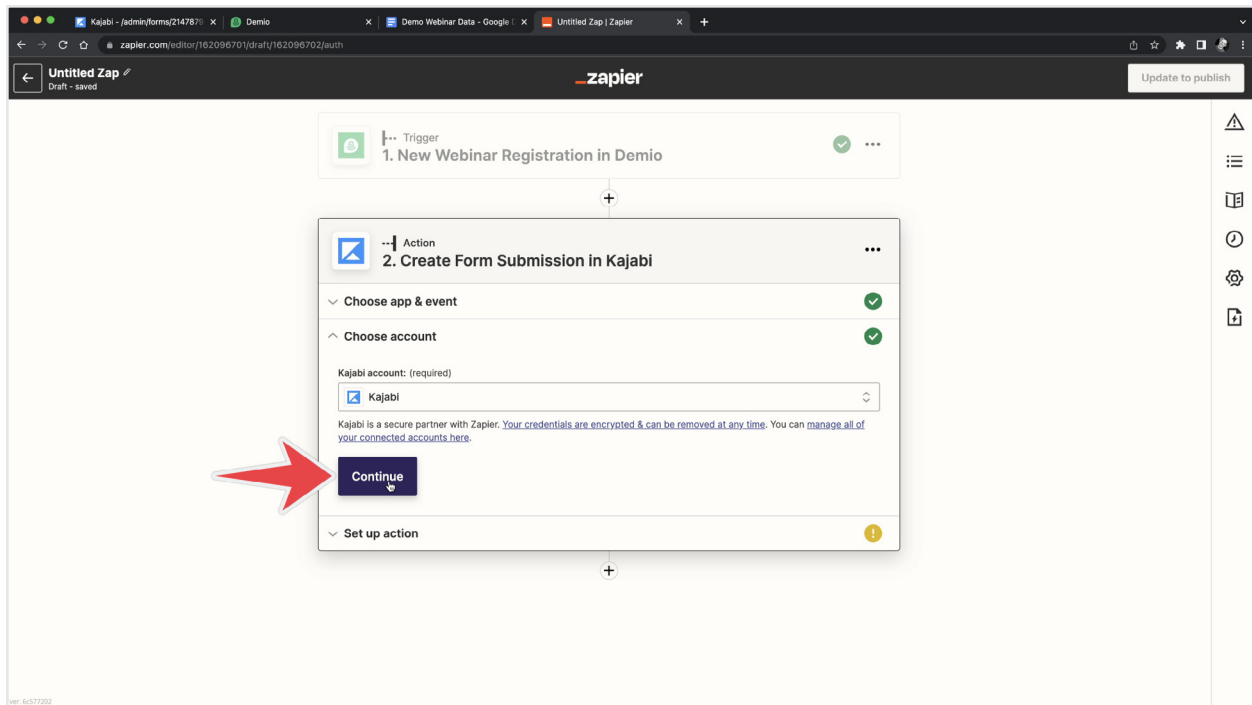
You will be asked to select an event. Choose **Create Form Submission** and click on **Continue**:



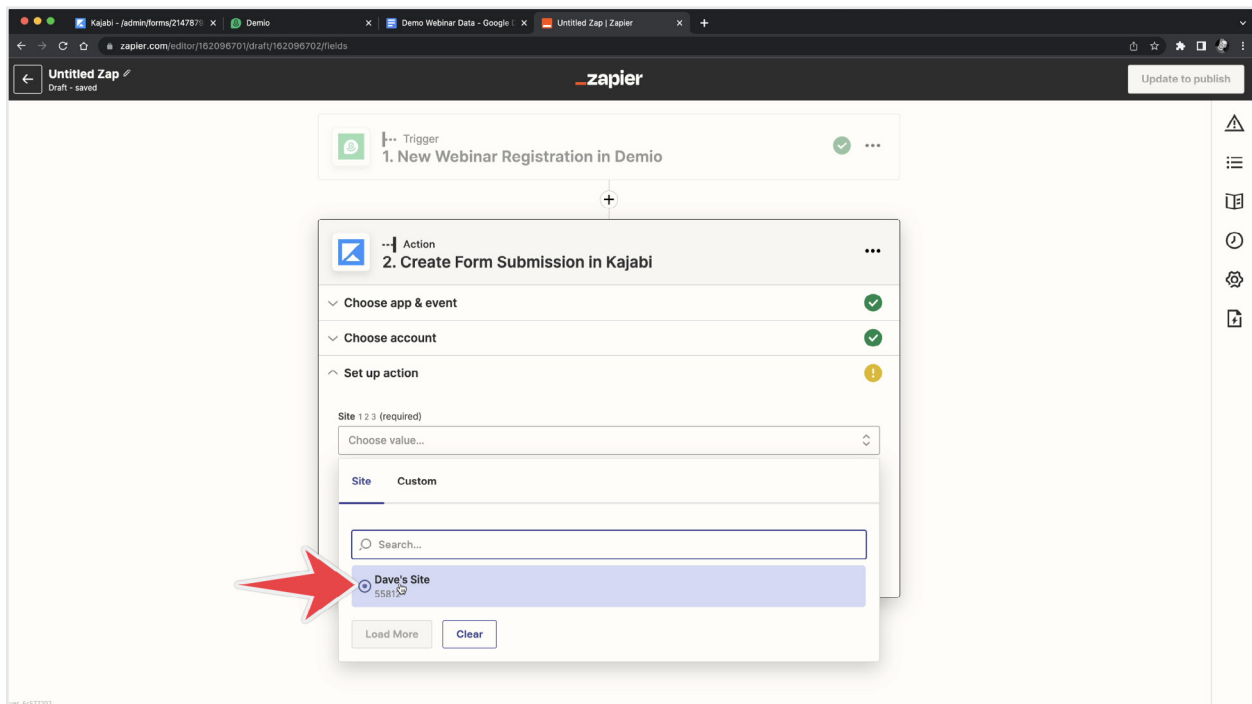


You will be asked to select your Kajabi account and then click **Continue**:

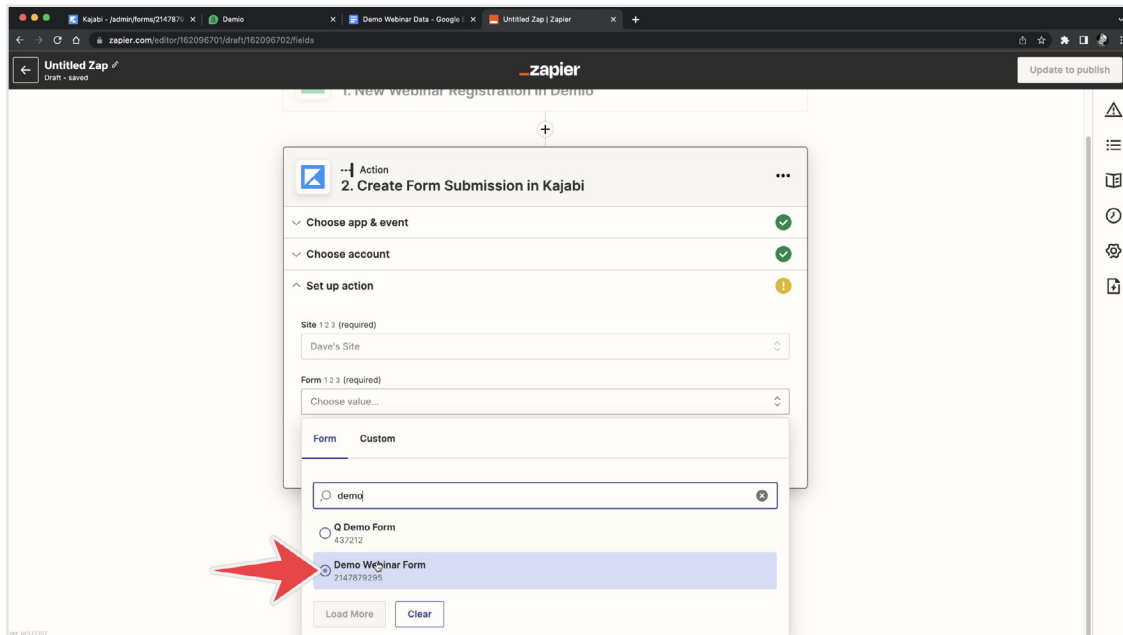




Now you need to select your site. Select your Kajabi site:

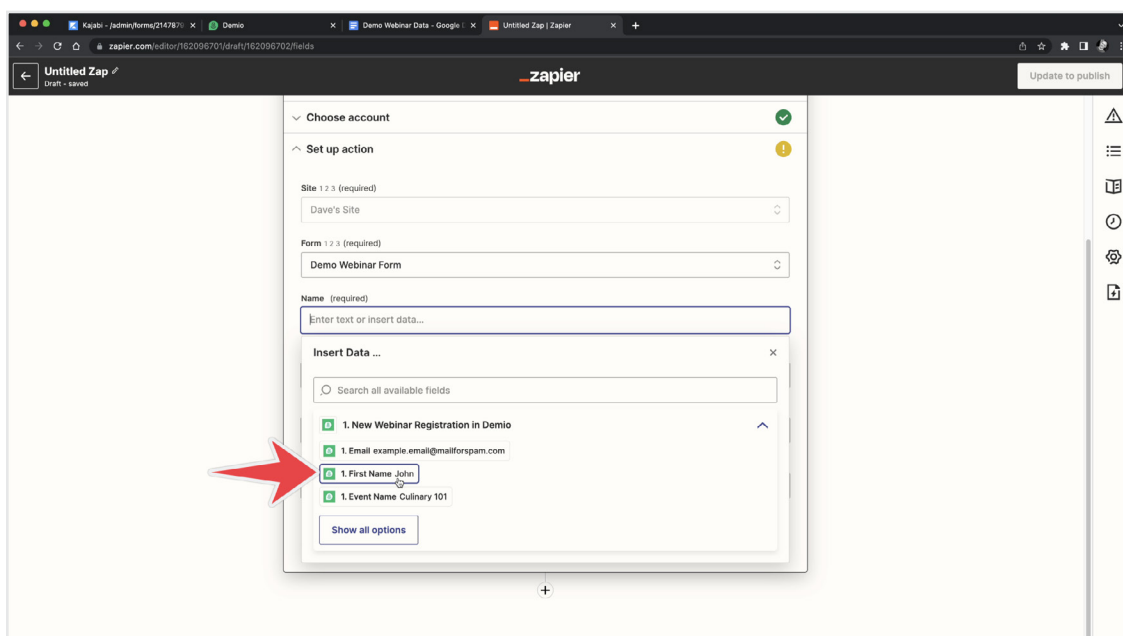


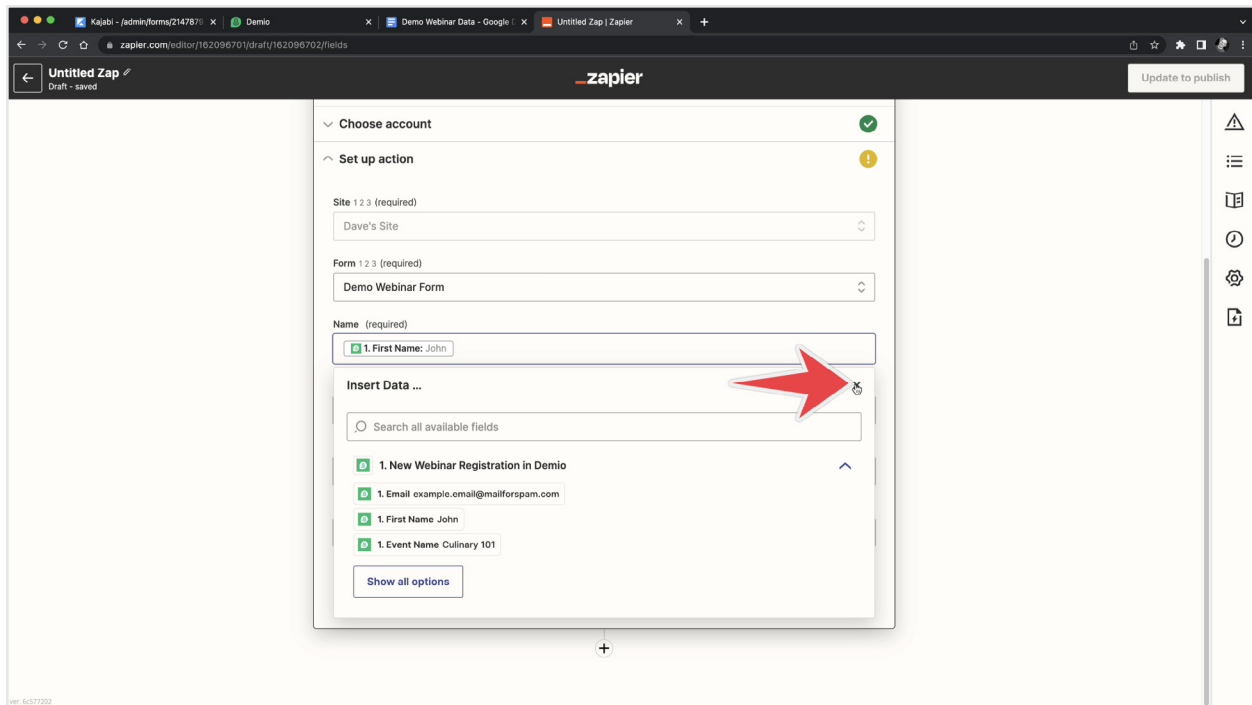
After that, you need to select your form. This will be the form that Kajabi automatically created for you when you created your funnel and that you added the custom fields to:



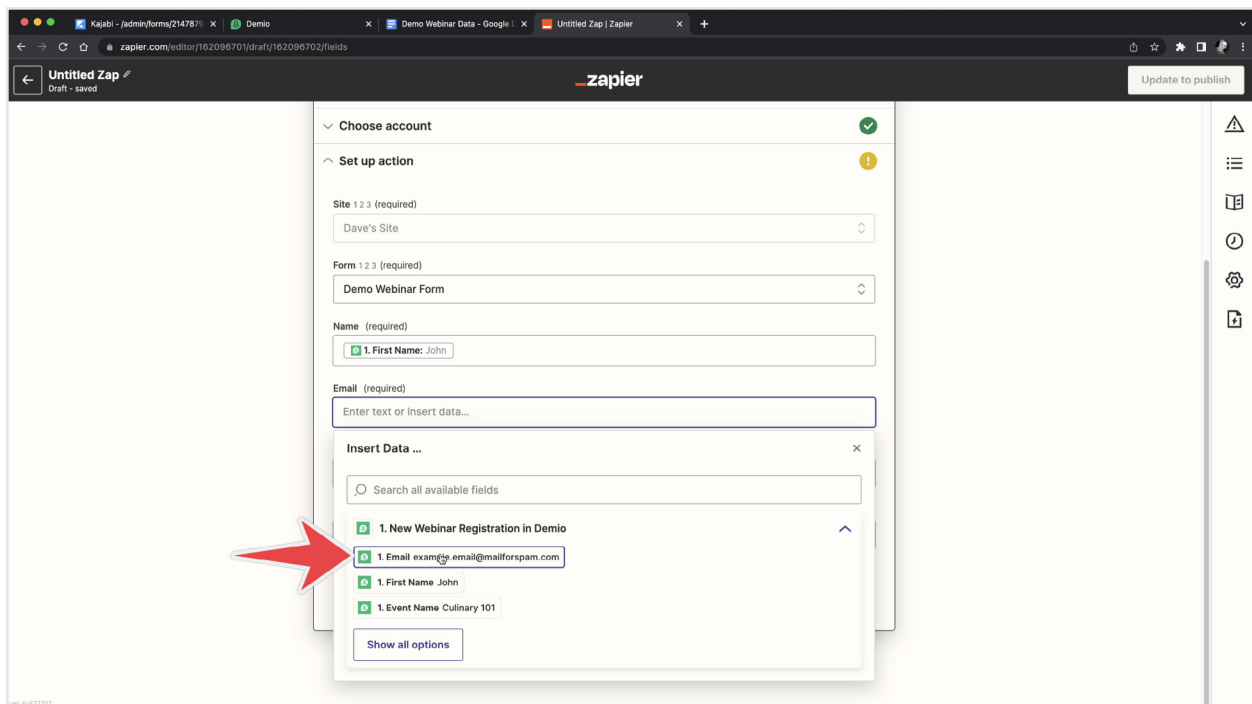
And now you need to map the fields between Demio and Kajabi, so the correct data from Demio gets stored in the correct fields in Kajabi.

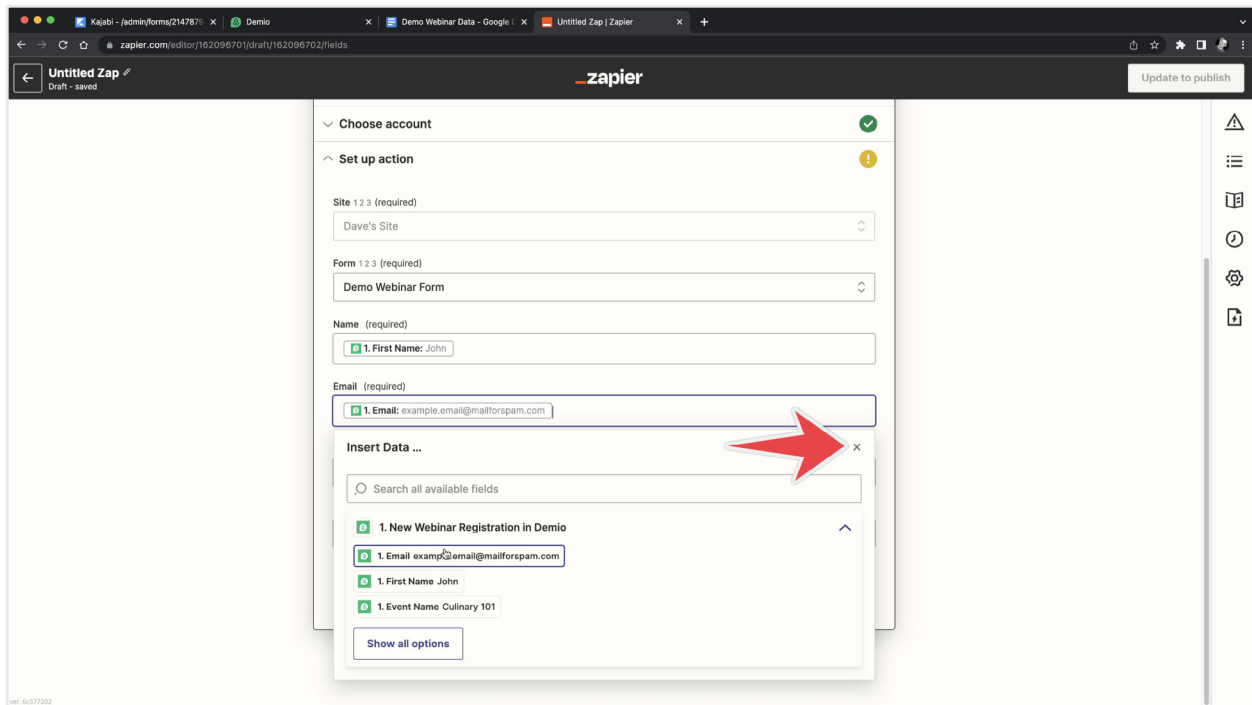
First you'll need to map the name. So select the **First Name** field from Demio and map it to the **Name** field in Kajabi. When done, click the **X** to close the dialog:



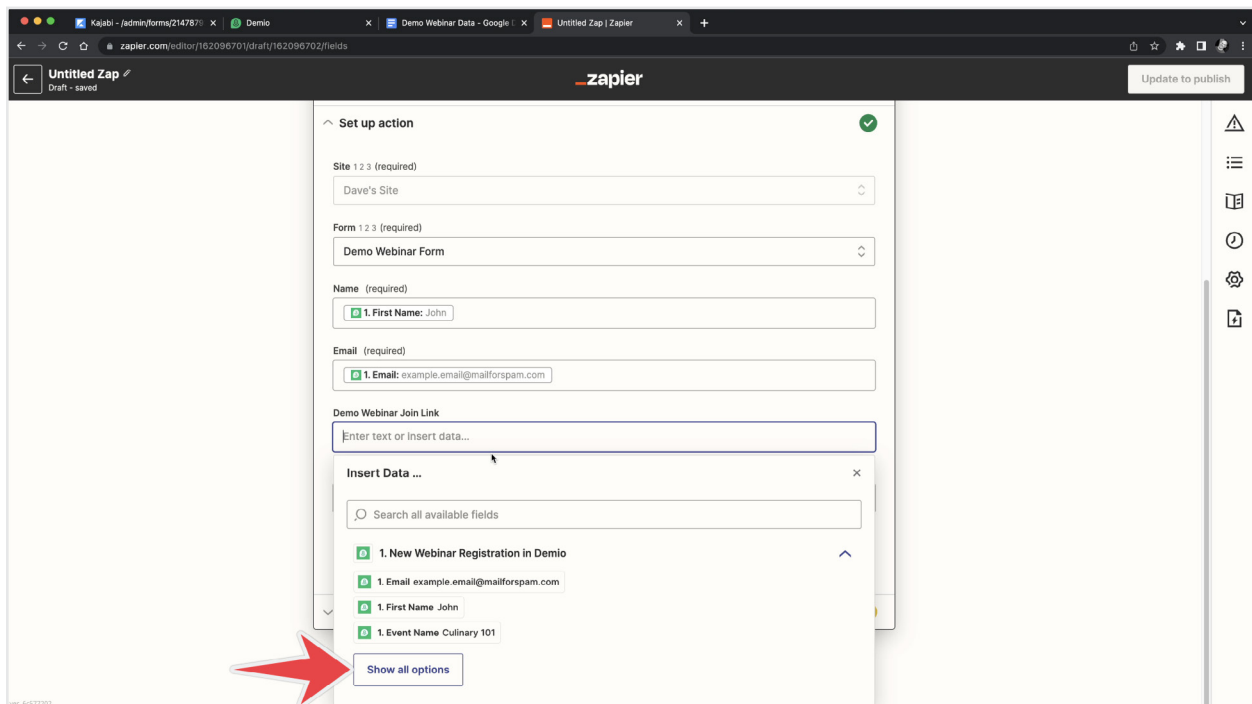


After that, map the **Email** fields between Demio and Kajabi and click the **X** to close the dialog:

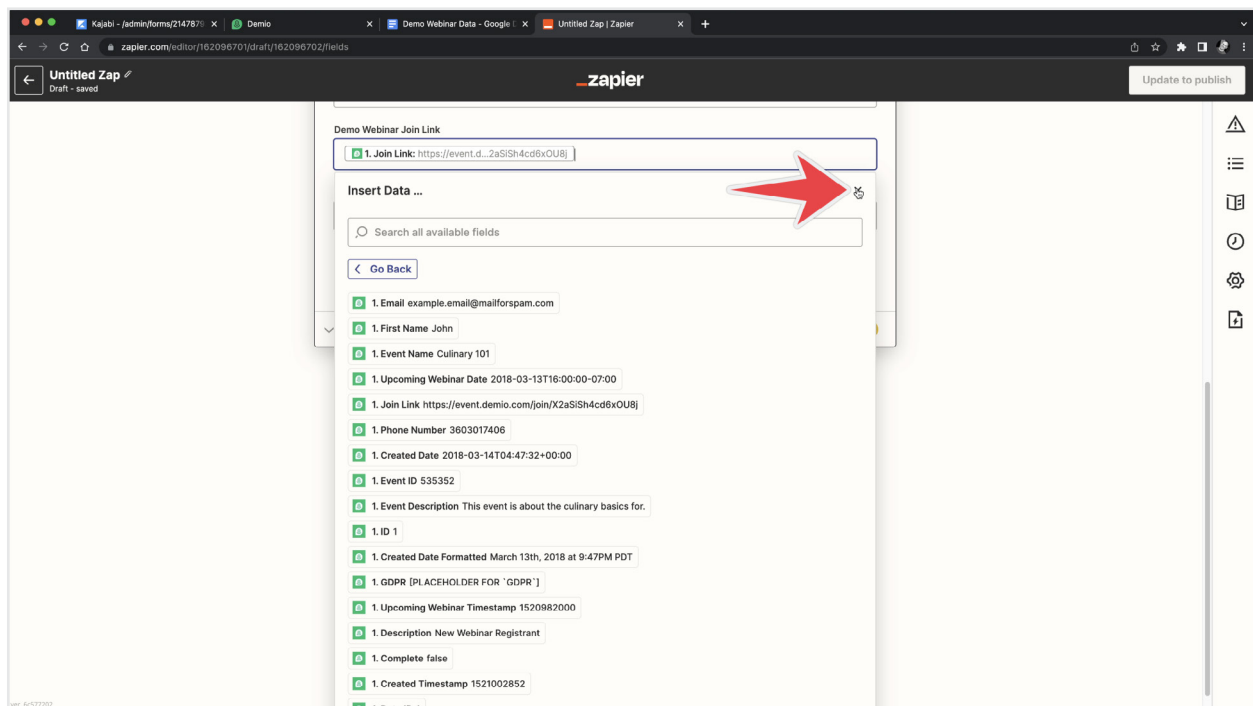
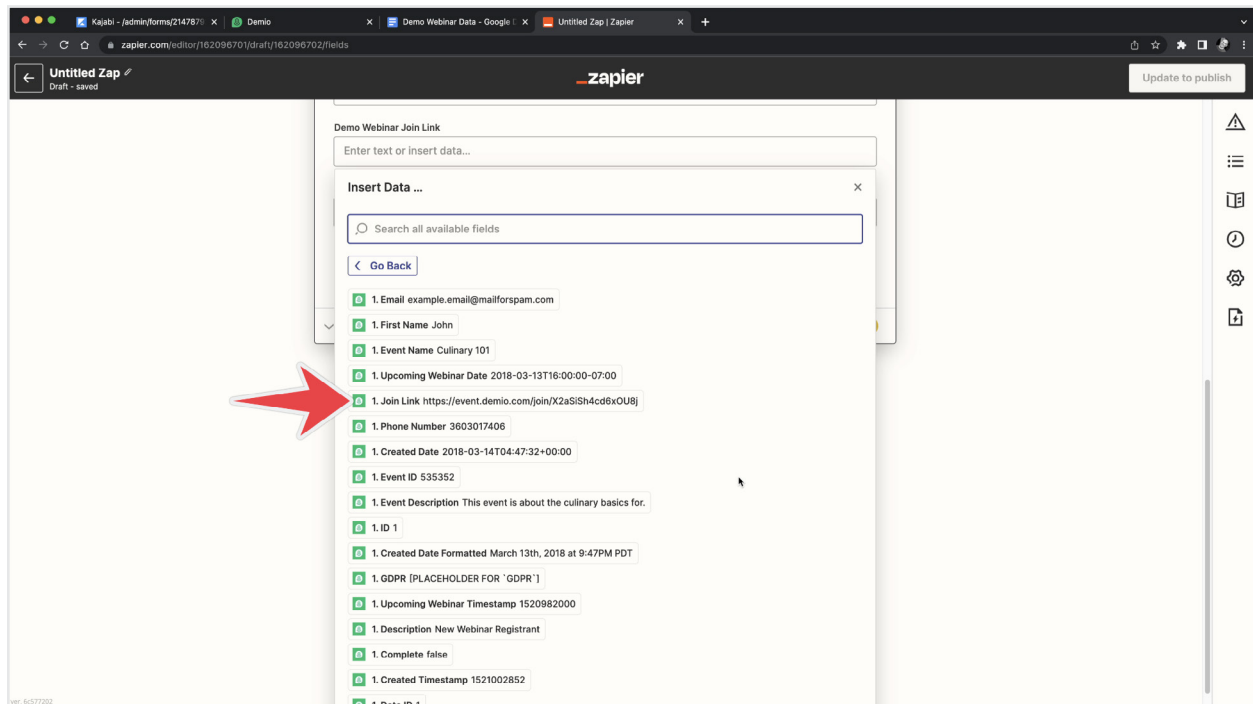




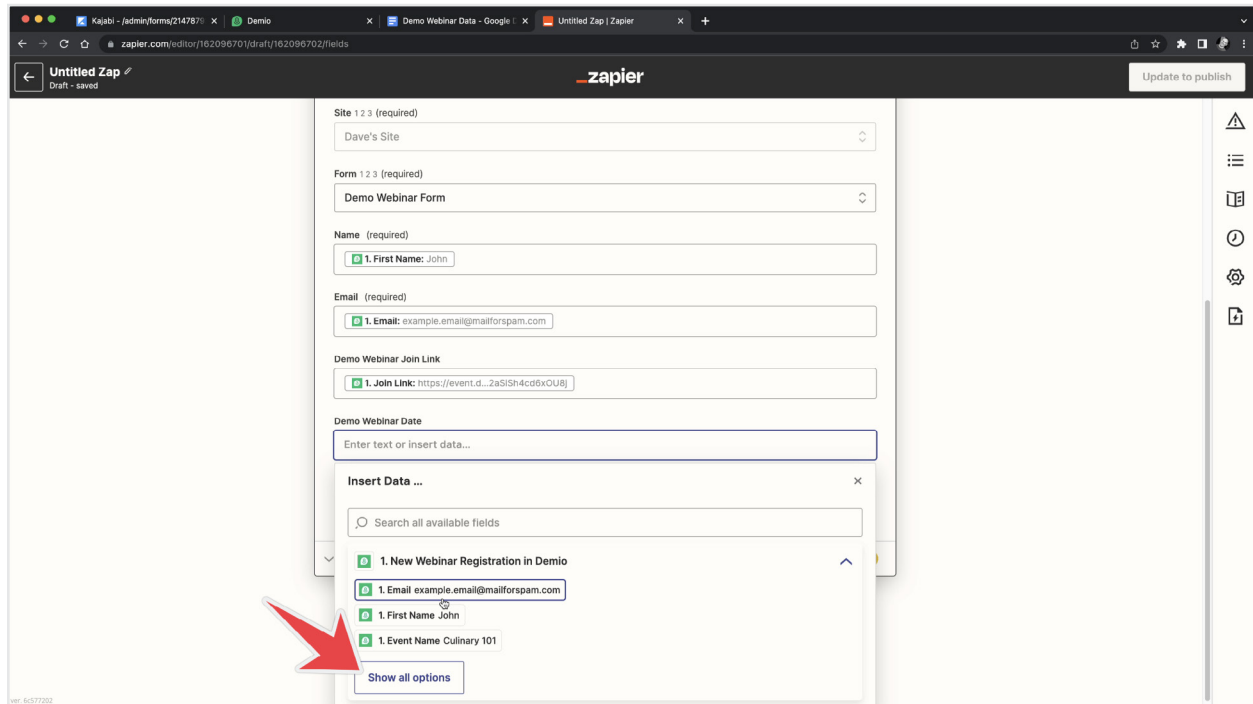
Now you have to map the custom fields you added to the form in Kajabi. First, you'll map the webinar join link. Click on the dropdown for that field and then click on **Show All Options**:



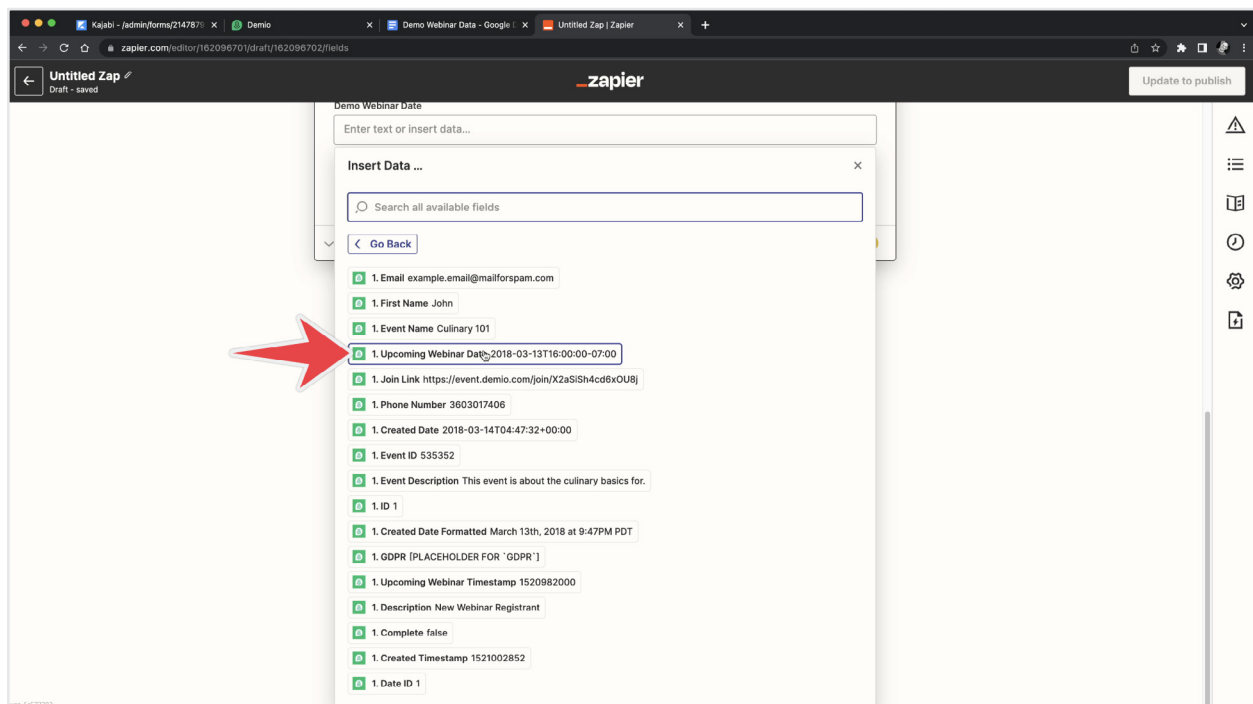
Then select the **Join Link** field in Demio and click the **X** to close the dialog:

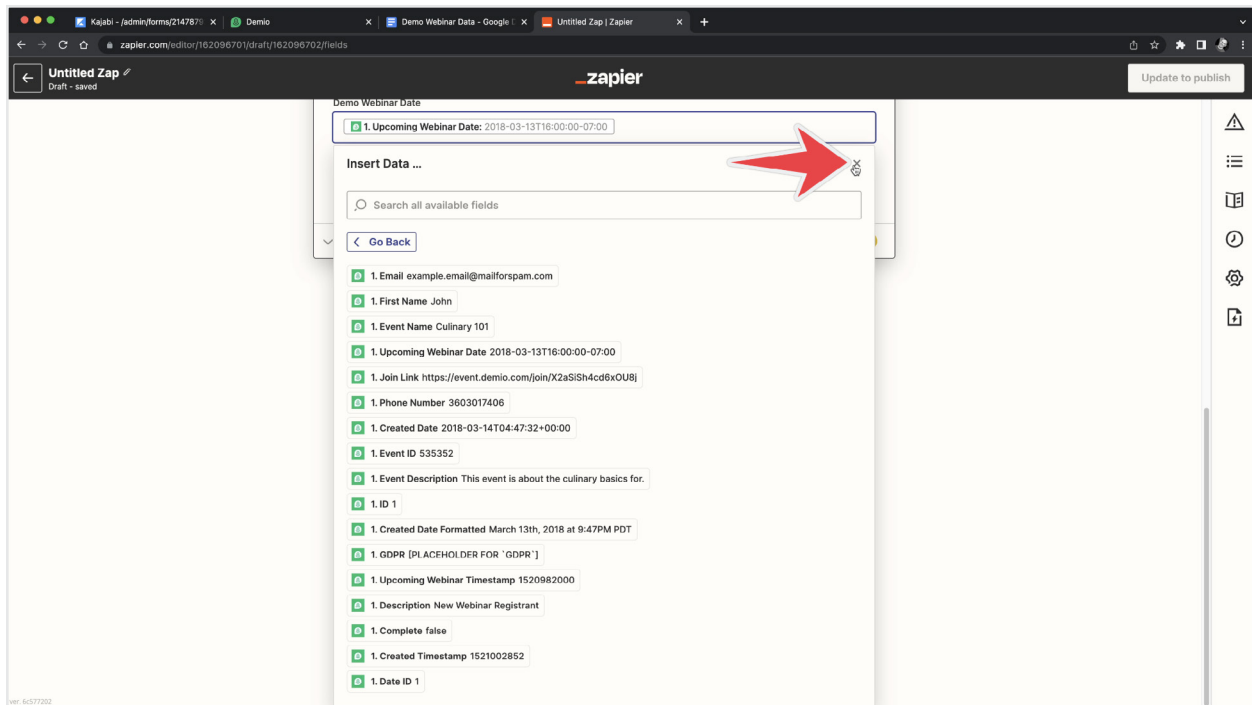


Now you'll repeat the process for the webinar date. Click on the dropdown for the webinar date and then click **Show All Options**:

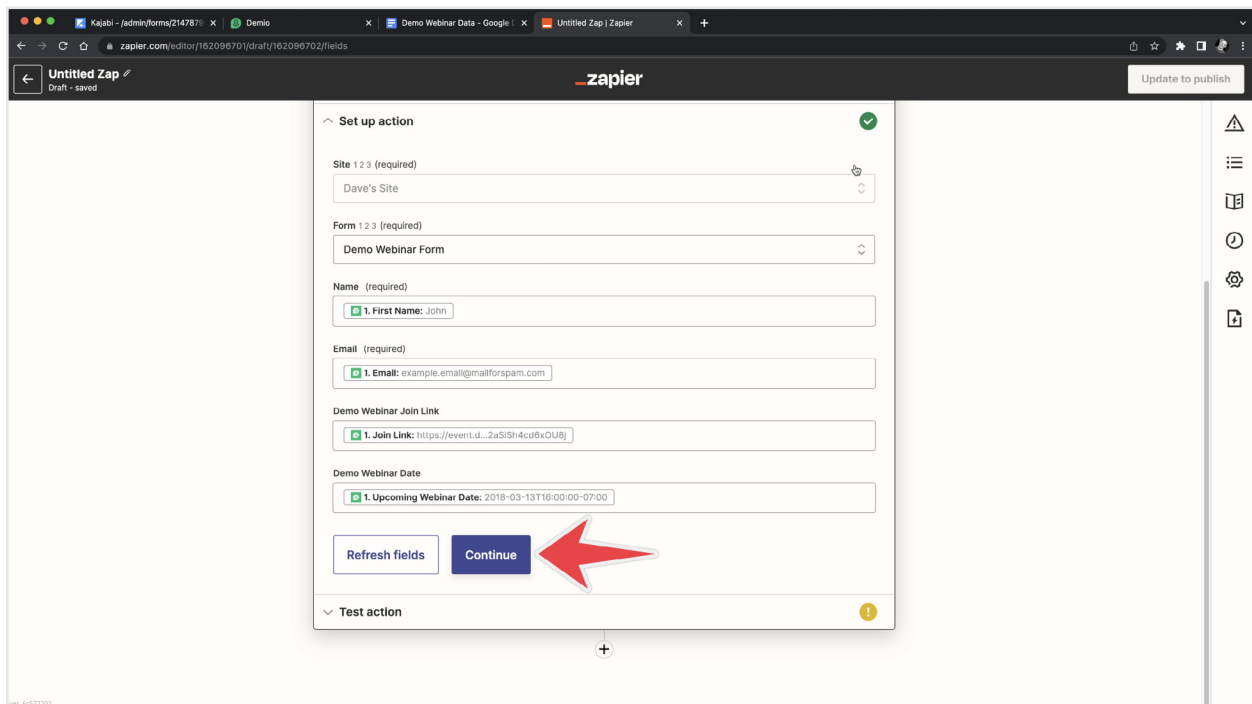


Next, choose **Upcoming Webinar Date** from Demio and click the **X** to close the dialog:

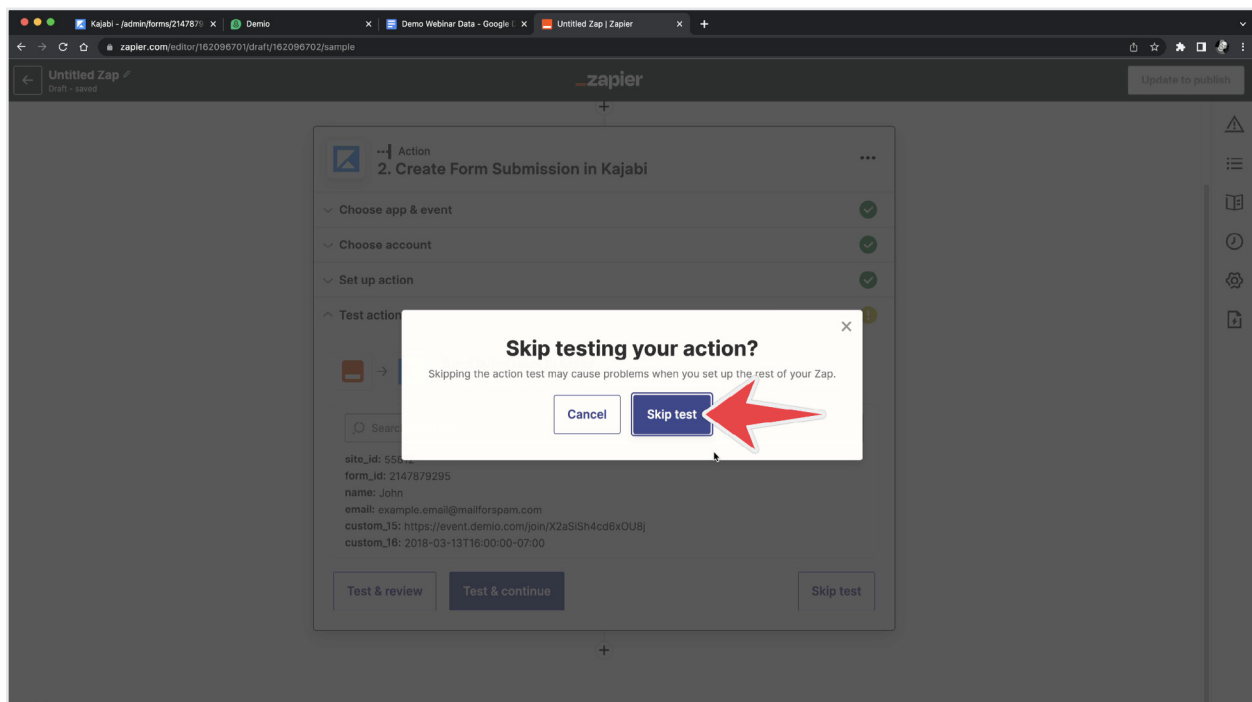
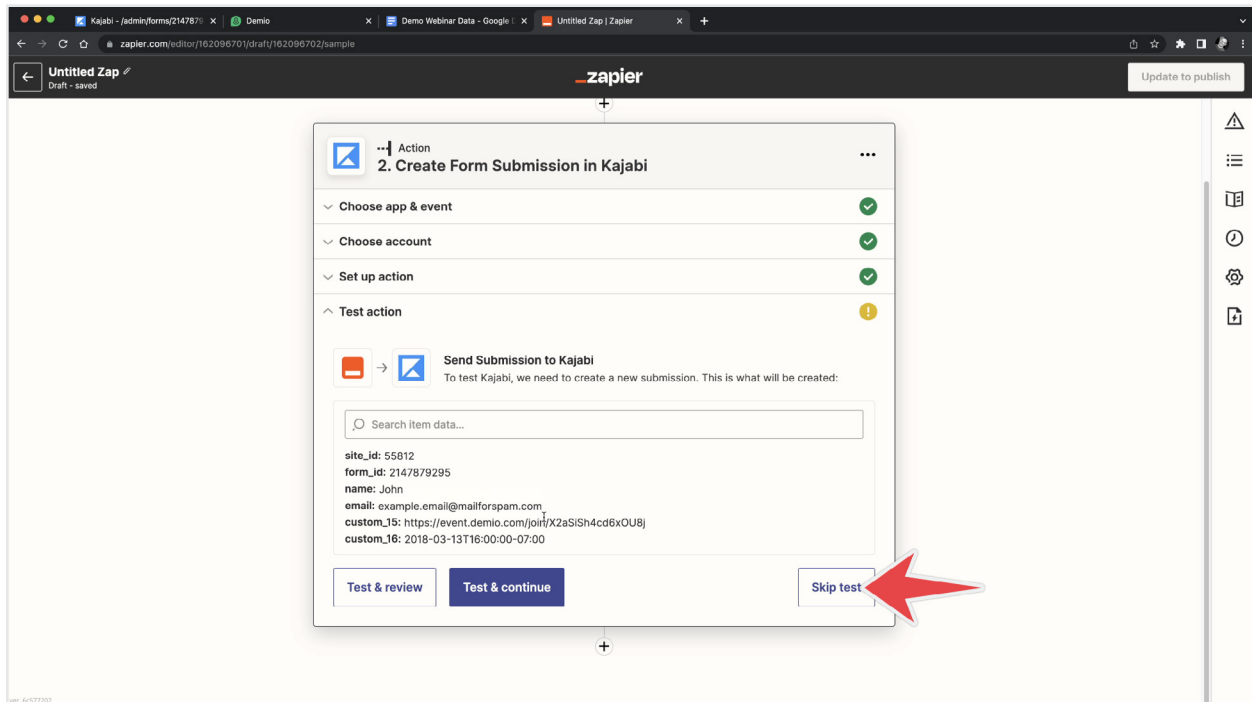




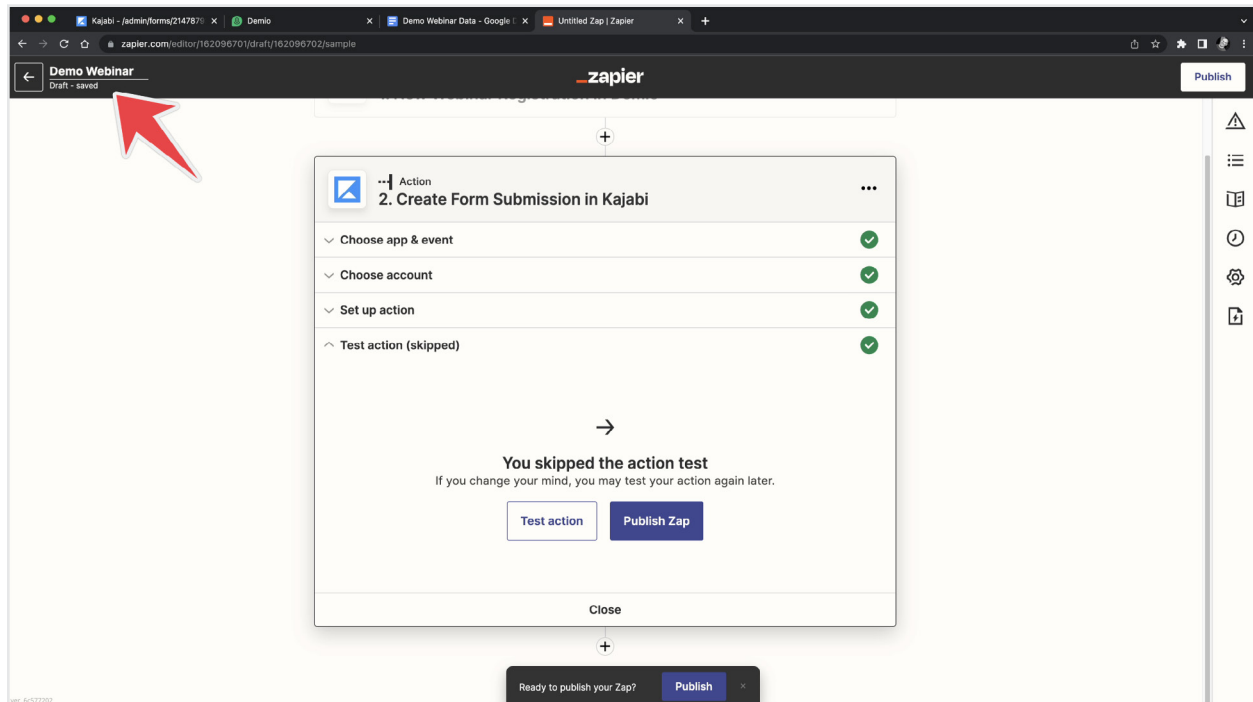
Then click on **Continue**:



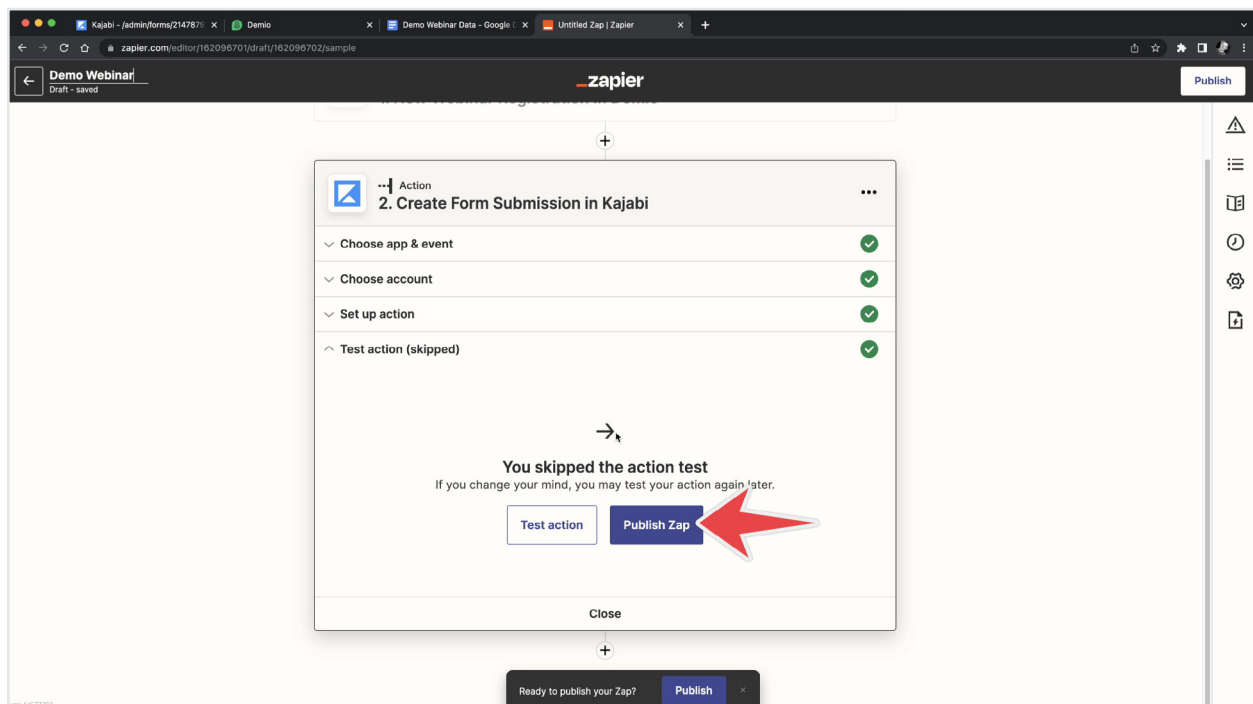
Zapier will then want to perform a test. But you'll skip this test, as you'll be testing everything in a different way later on. So click **Skip Test** and then **Skip Test** again:



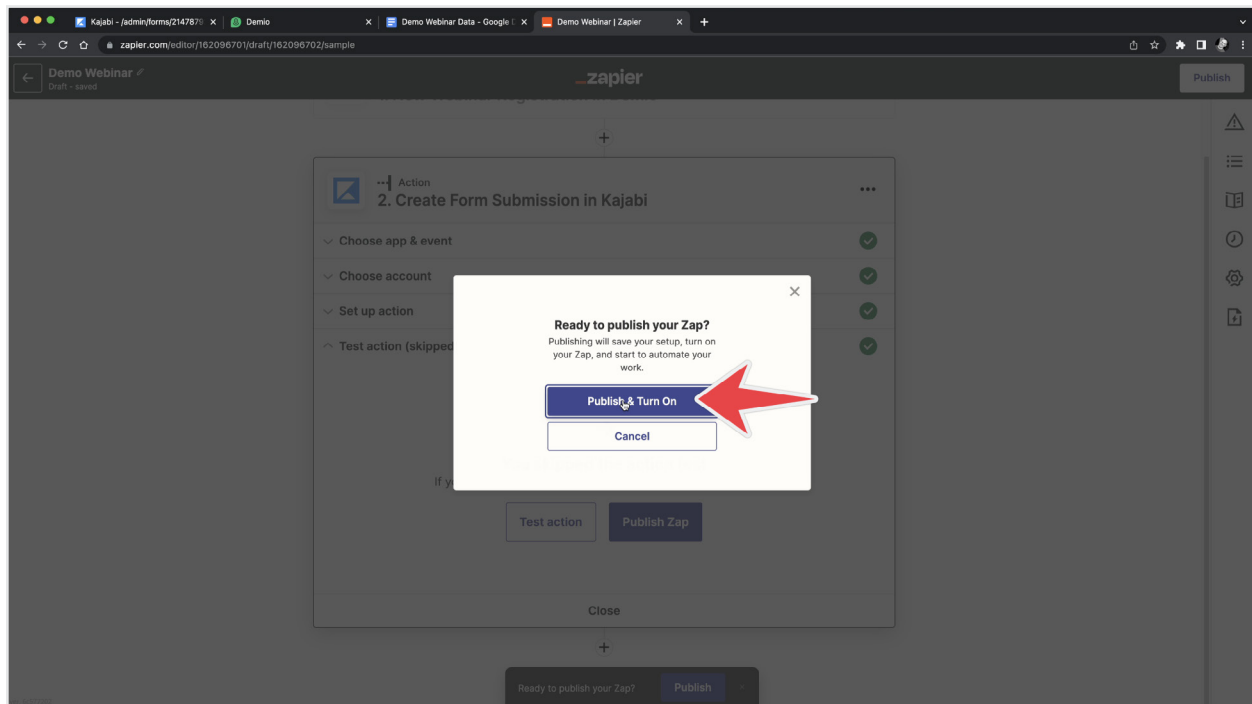
Now you need to name your Zap. To do that, go to the upper left corner, click on the pencil and give your Zap a name that makes sense to you. In this example, I've named mine Demo Webinar:



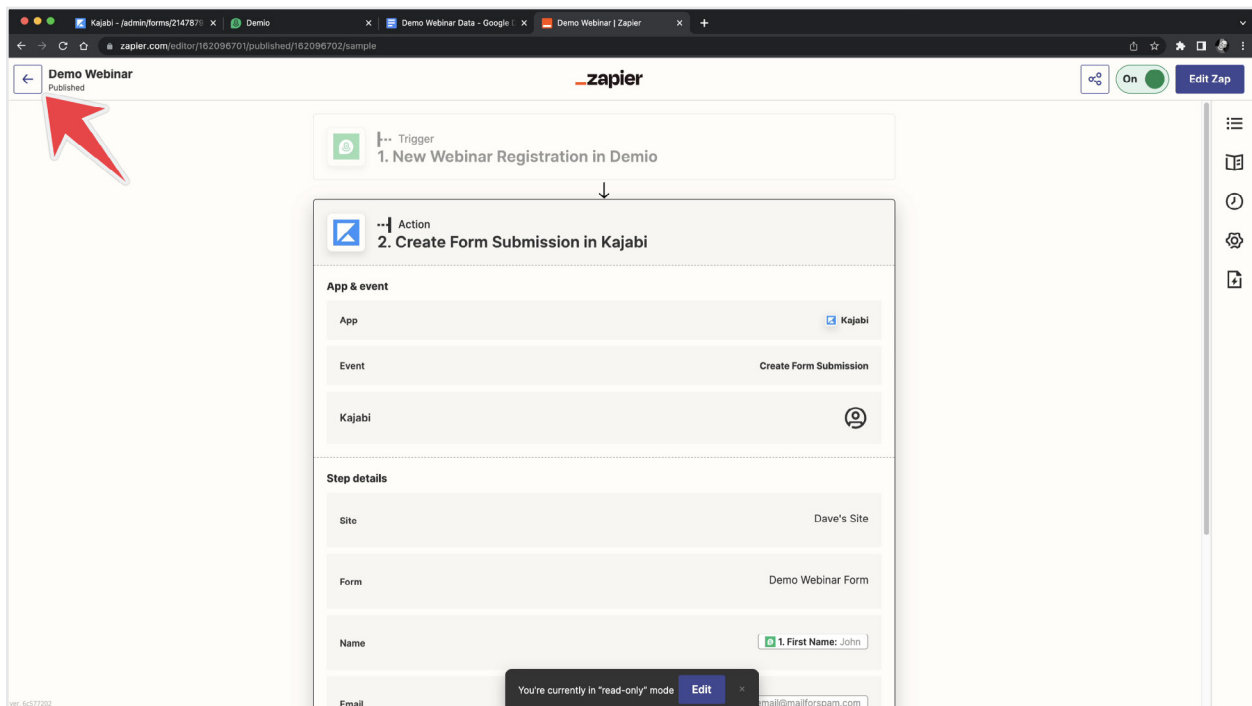
Next, to make your Zap live and ready to use, click the **Publish Zap** button:



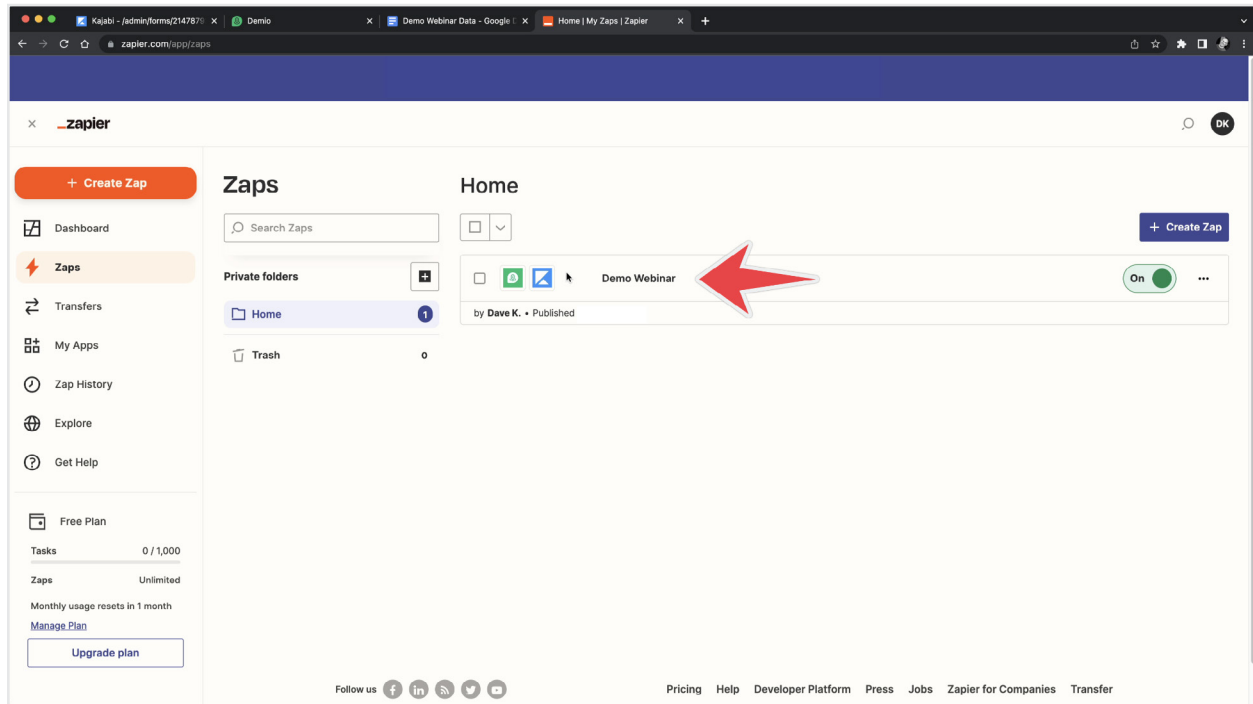
And then click **Publish and Turn On**:



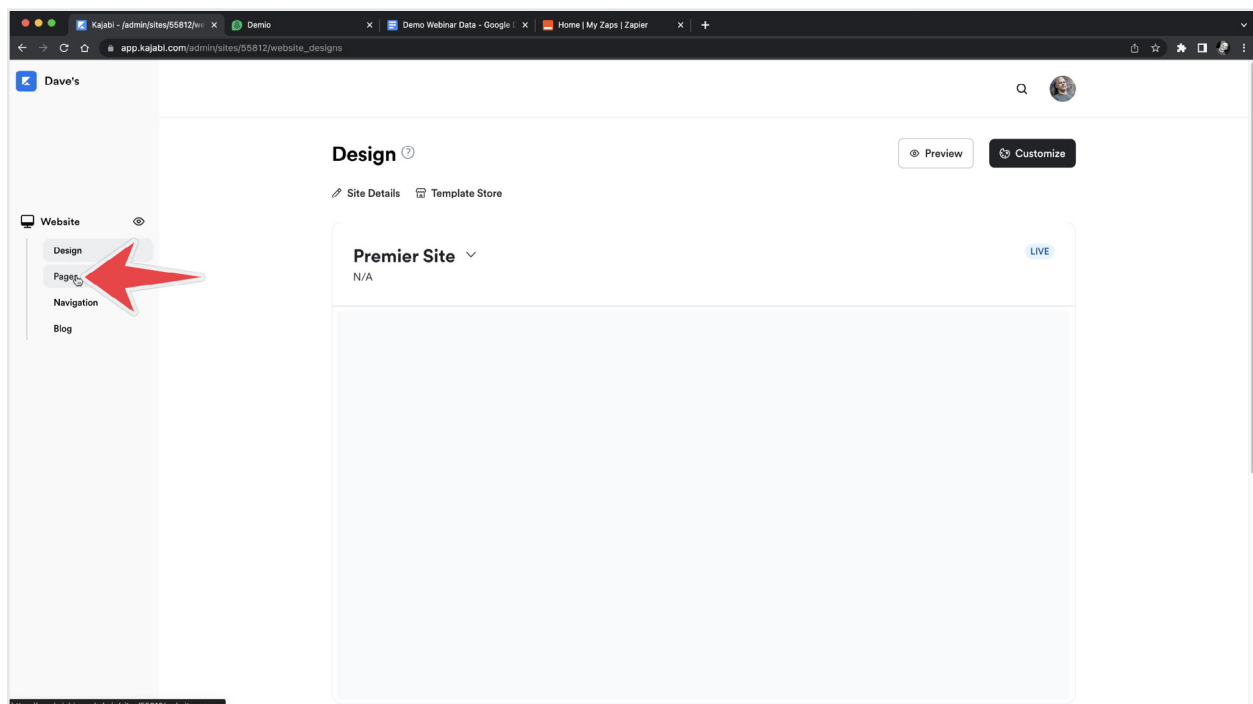
Next, go to the upper left and click on the back arrow:



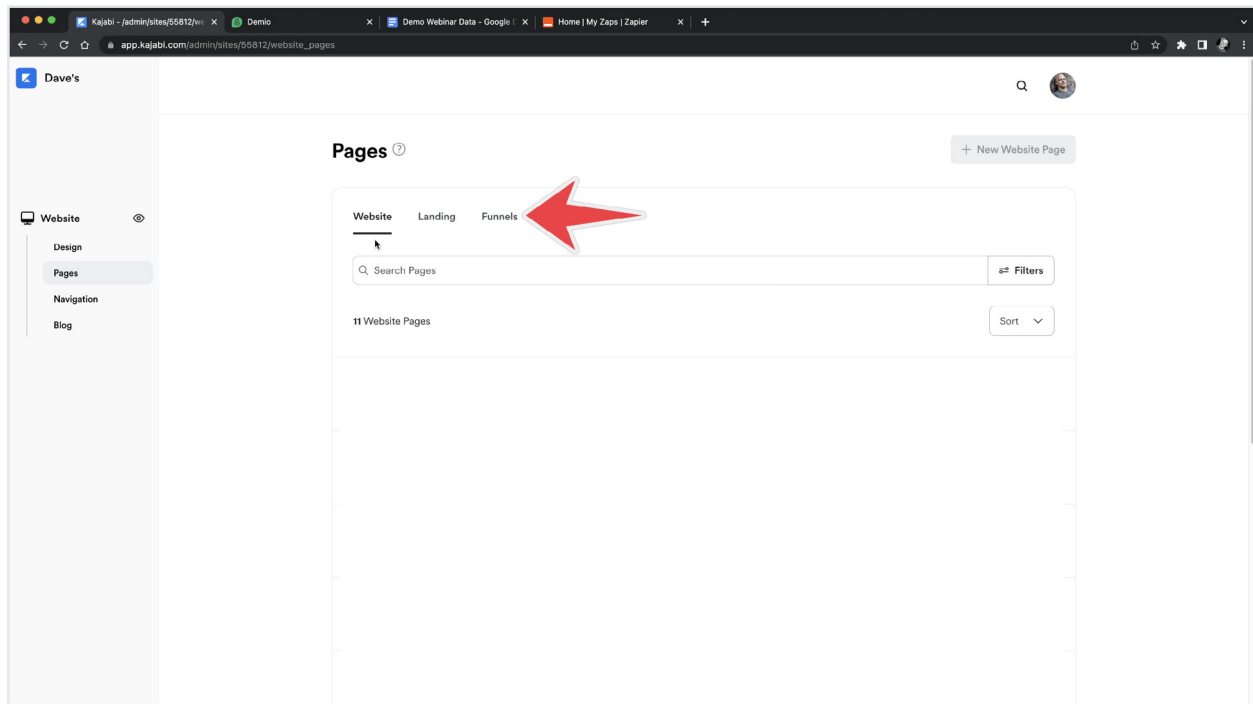
And then you'll be able to see your published Zap listed. This is also where you can go back into the Zap if you ever need to make any changes:



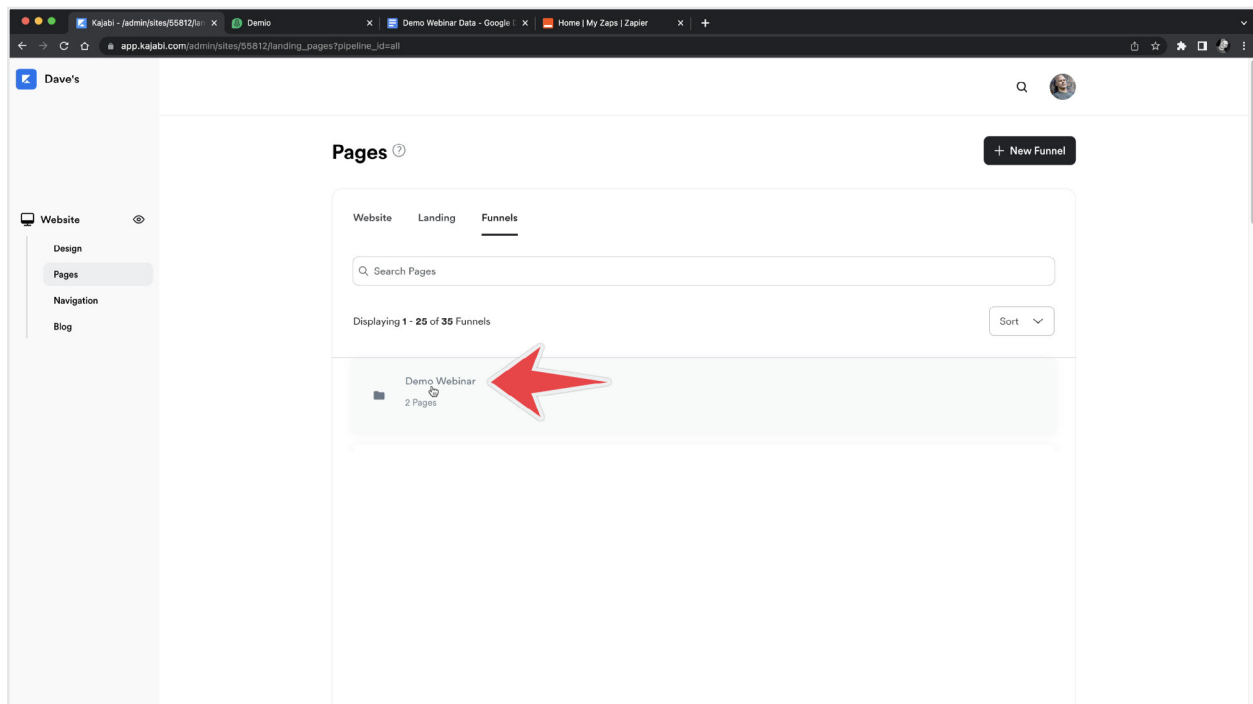
You're all done working in Zapier. Now it's time to test everything out to make sure everything is working perfectly. So go back into Kajabi, select **Website** and then **Pages**:



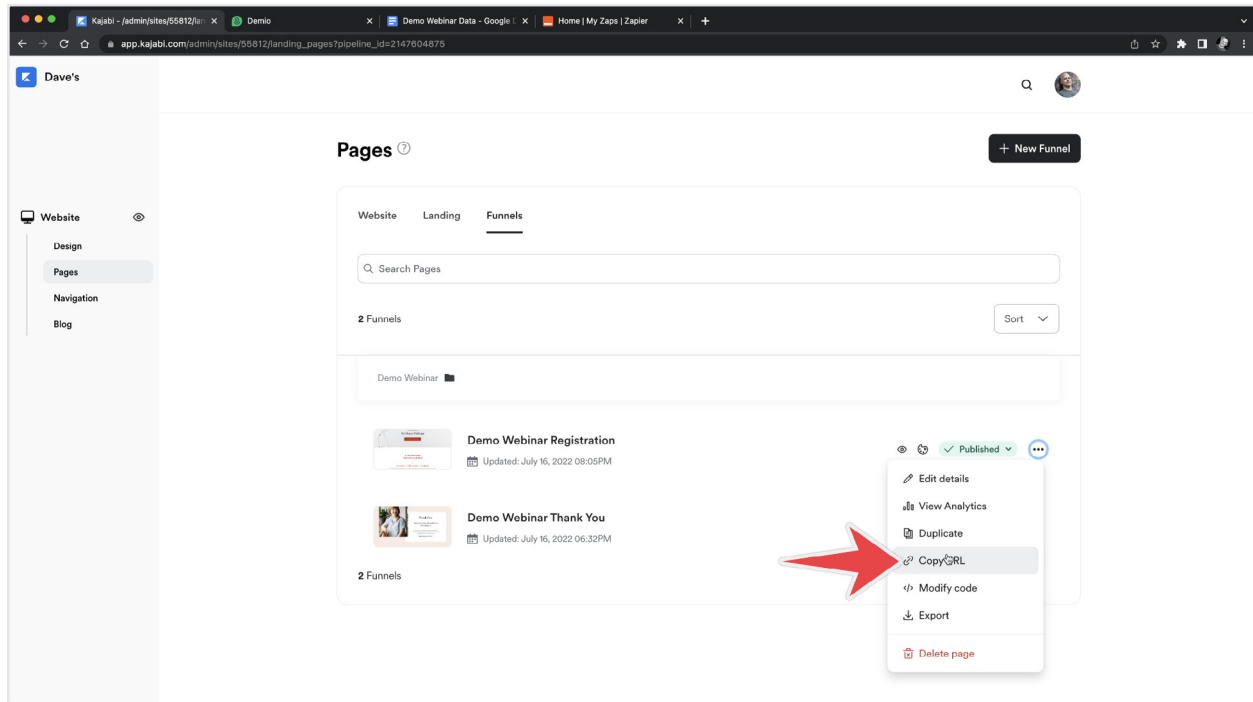
Then click on the **Funnels** link:



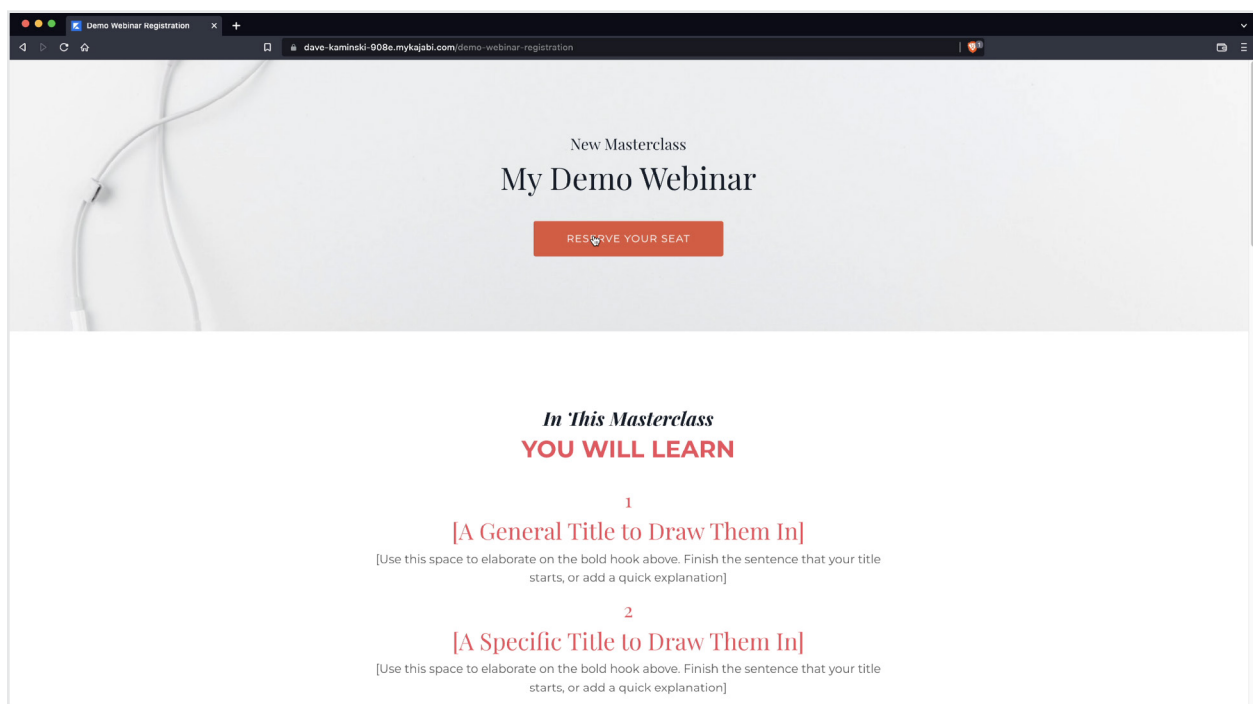
Locate your webinar funnel and click on it:



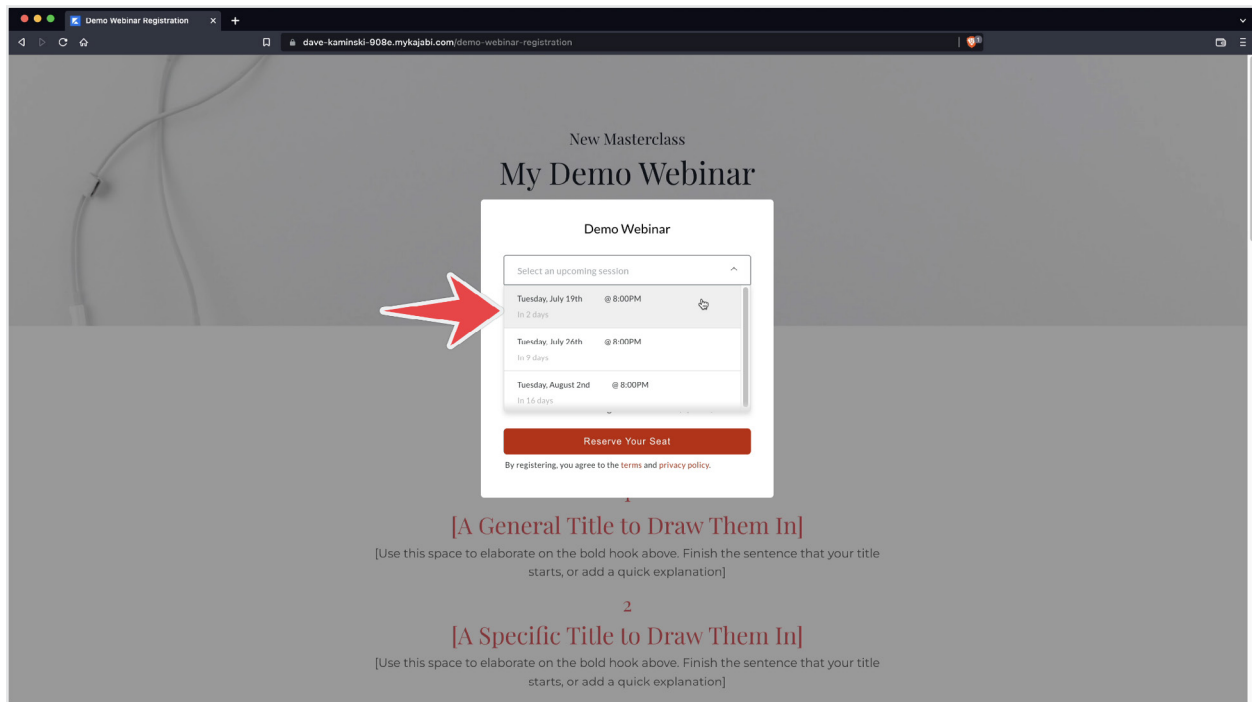
And then for your webinar registration page, go to the **three horizontal dots** on the far right, click on it and then click on **Copy URL**:



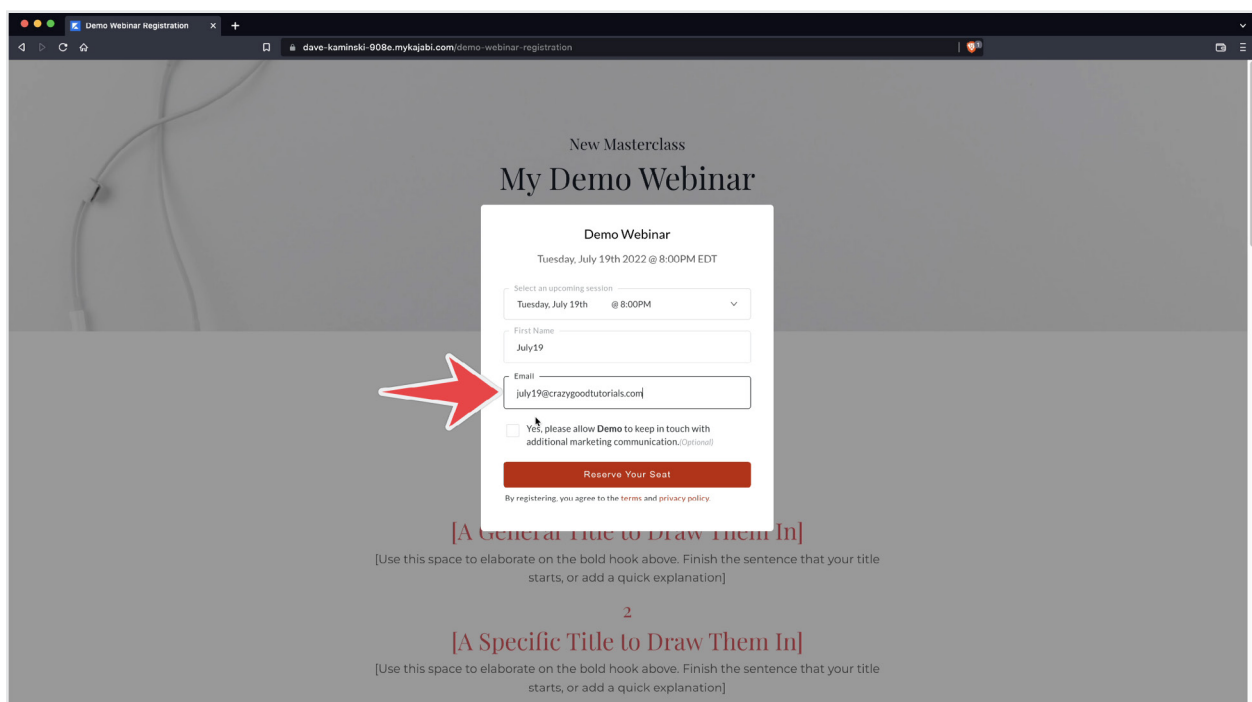
Open a new tab in your browser and paste in the URL you just copied. You will see your webinar registration page. Click on the registration button at the top of the page:



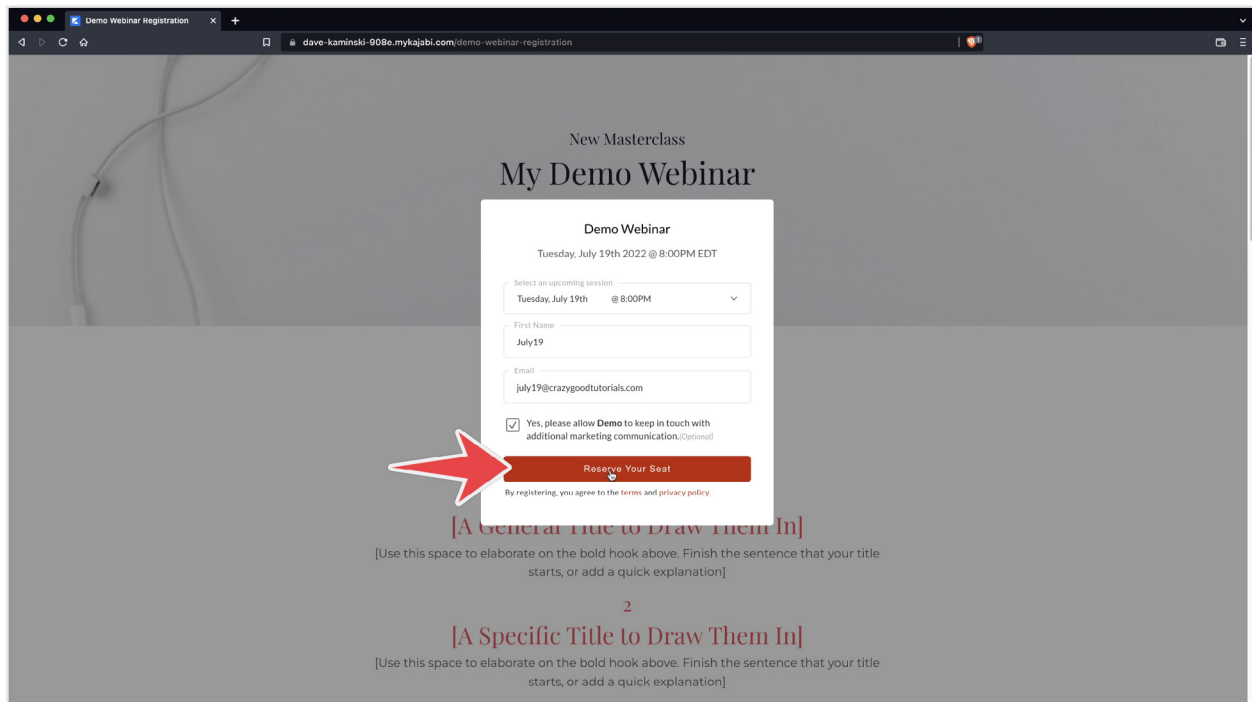
When the popup appears, select your first webinar session:



For the name and email, enter something that reflects the date of the webinar. In this example, my first webinar is on July 19th. So I entered July 19 for the name and an email address with July 19 in it. The email address isn't real, it's a fake email address just for testing purposes:

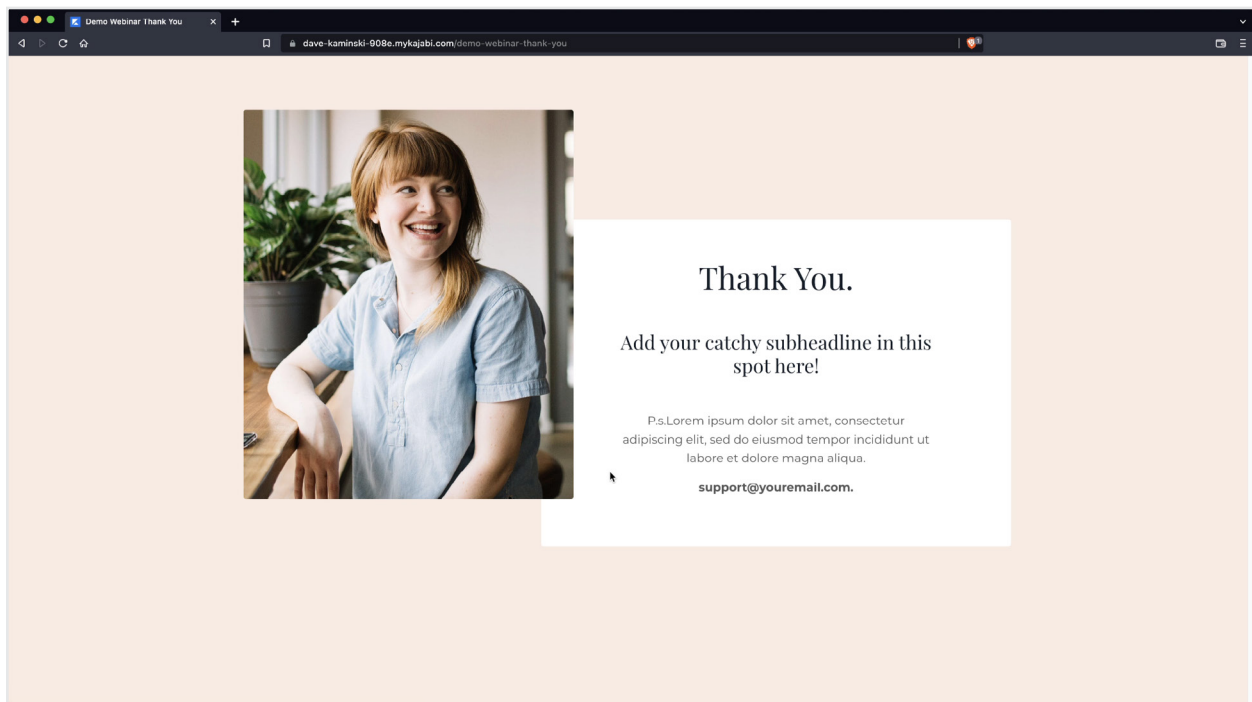


Then click the button to complete the registration:



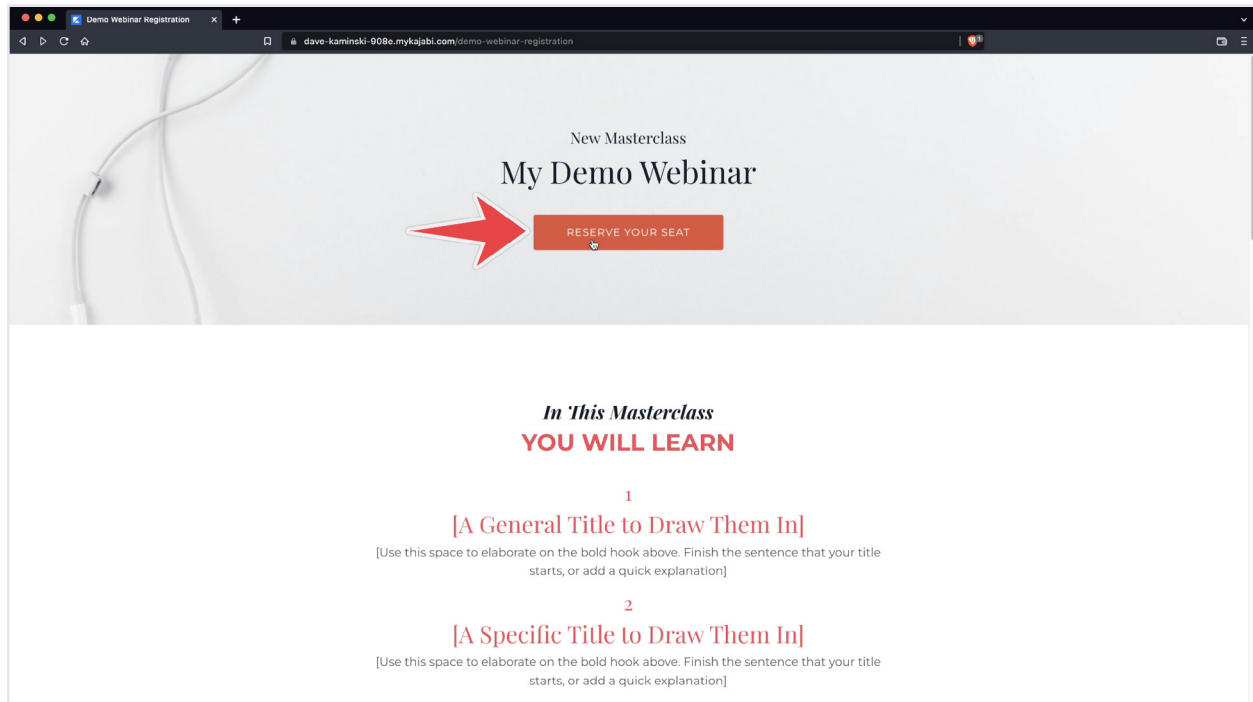
The screenshot shows a web browser window with the URL `dave-kaminski-908e.mykajabi.com/demo-webinar-registration`. The page has a dark grey background with a blurred image of a person. A white registration form is centered on the page. The form is titled "Demo Webinar" and includes the date and time "Tuesday, July 19th 2022 @ 8:00PM EDT". It has a dropdown menu for "Select an upcoming session" showing "Tuesday, July 19th @ 8:00PM". Below this are input fields for "First Name" (containing "July19") and "Email" (containing "july19@crazygoodtutorials.com"). There is a checkbox labeled "Yes, please allow Demo to keep in touch with additional marketing communication.(Optional)" which is checked. A red arrow points to a red button labeled "Reserve Your Seat". Below the button, it says "By registering, you agree to the terms and privacy policy." The background text on the page includes "New Masterclass", "My Demo Webinar", and two placeholder sections for titles: "[A General Title to Draw Them In]" and "[A Specific Title to Draw Them In]".

You'll see your thank you or confirmation page:

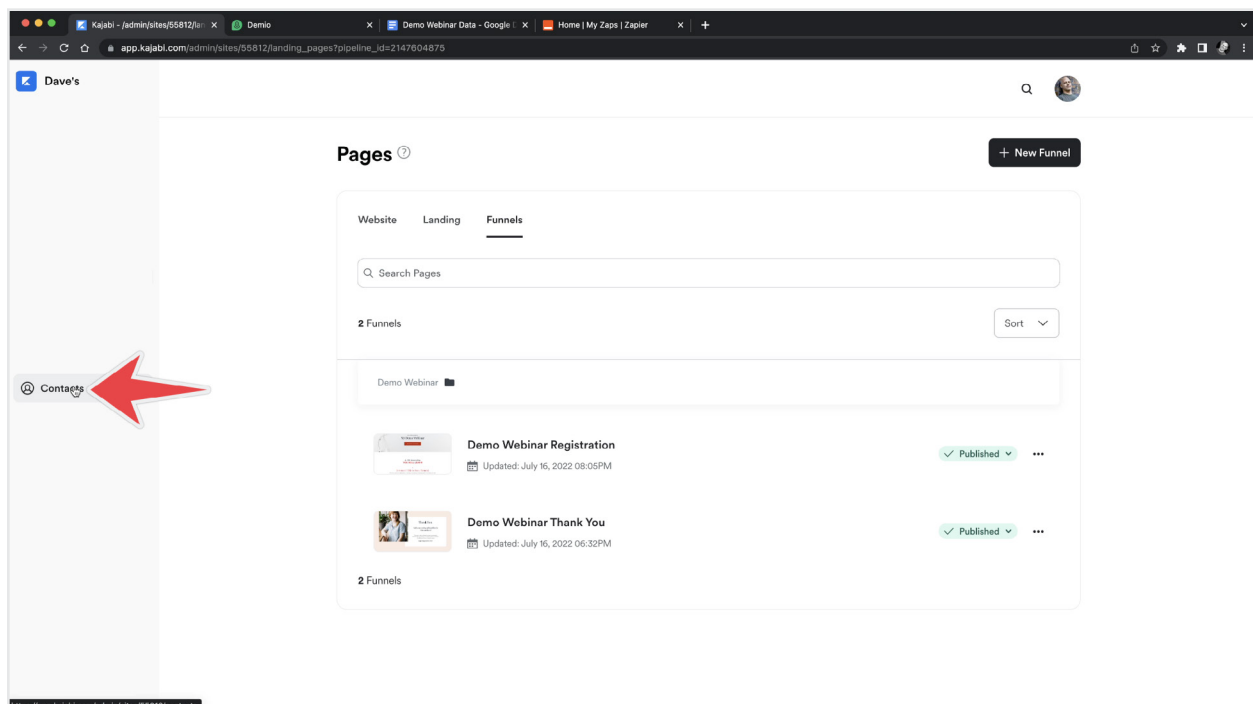


Click the back button in your browser to return to your webinar registration page and then click the refresh button in your browser.

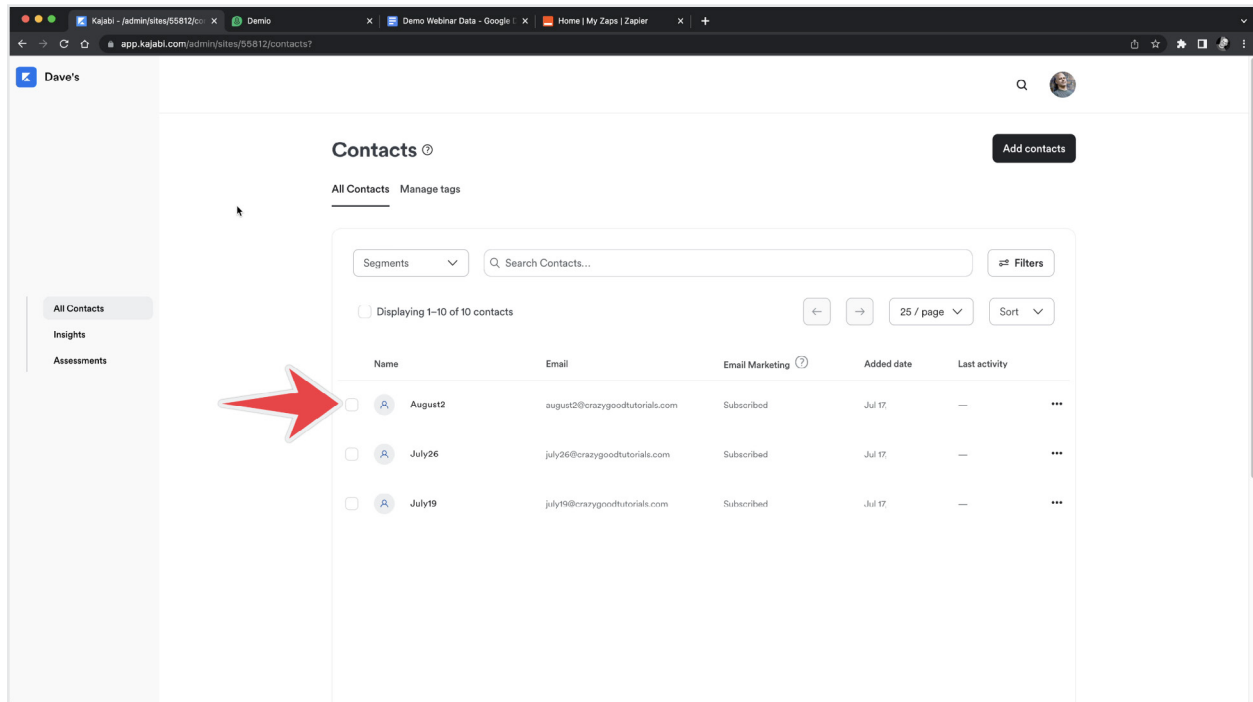
Now you will repeat the same exact process for your remaining two webinars, making sure that you enter a name and fake email address that reflect the date of the webinar:



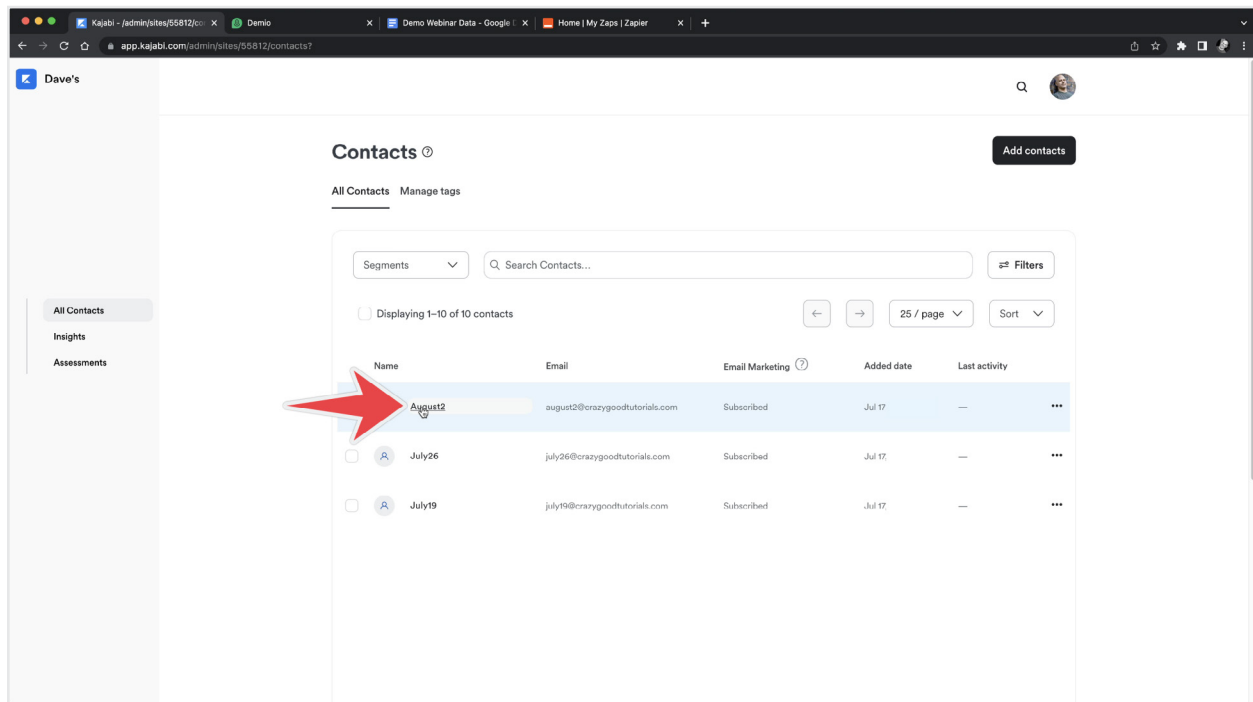
Once you're done, go back into Kajabi and in the panel on the left, click on **Contacts**:



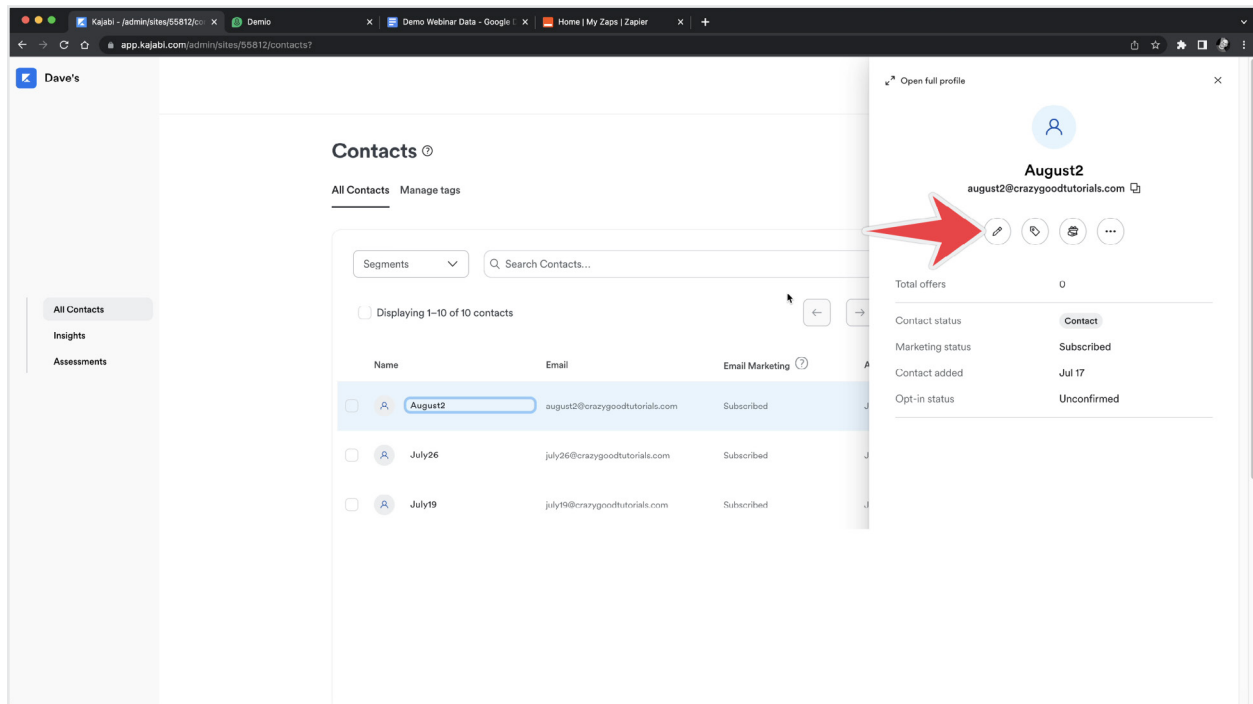
This is where we are going to verify that everything is working correctly between Demio, Kajabi and Zapier. And what you should see are the three dummy webinar registrants that you just created:



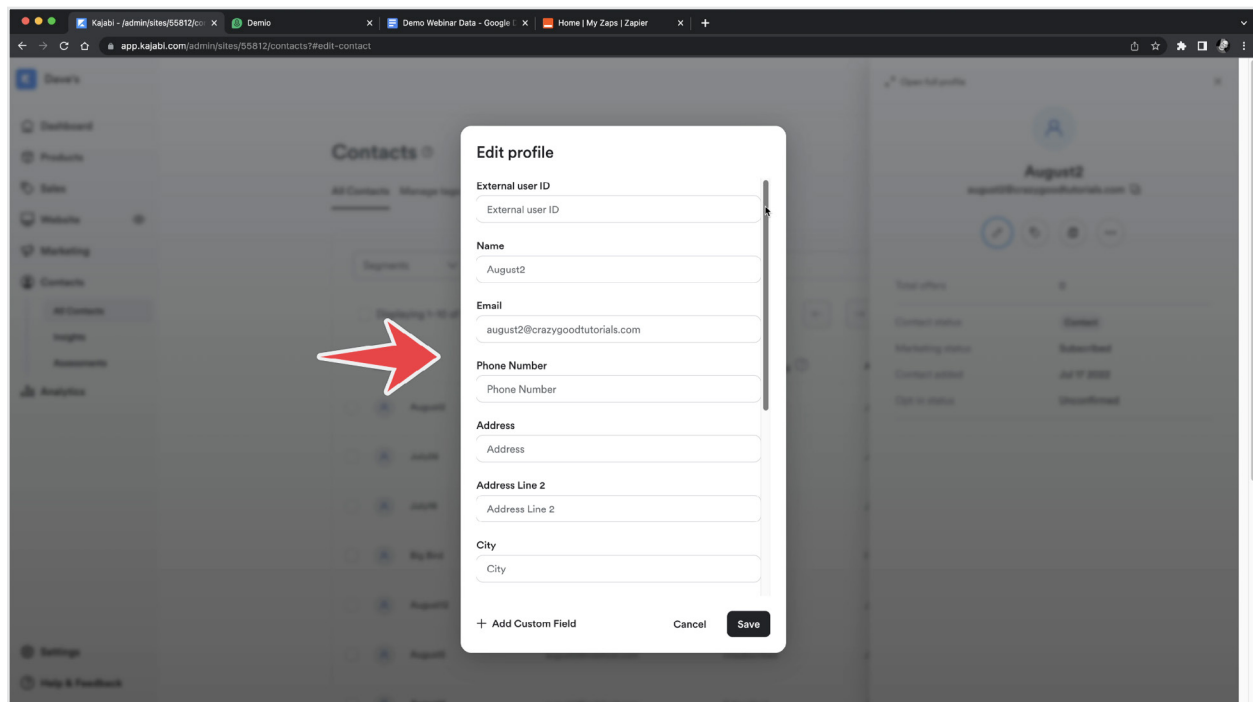
Click on the name for the first webinar registrant in the list:



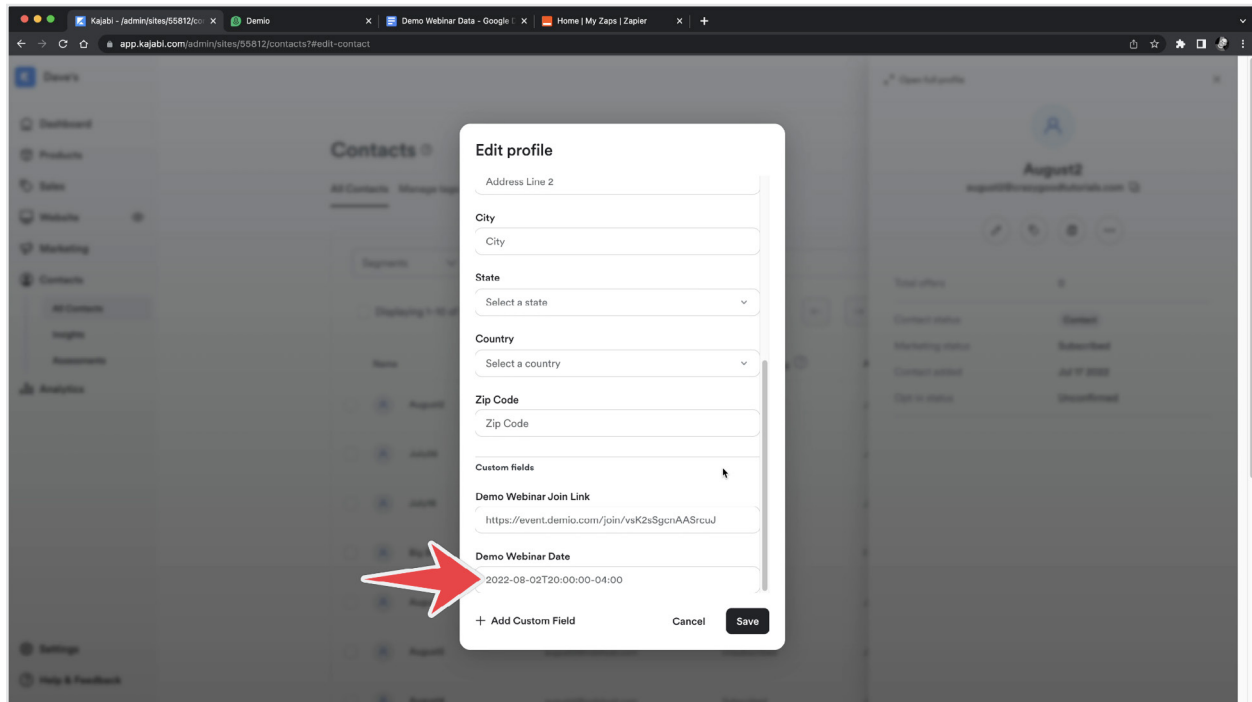
Then in the dialog on the right, click on the pencil icon:



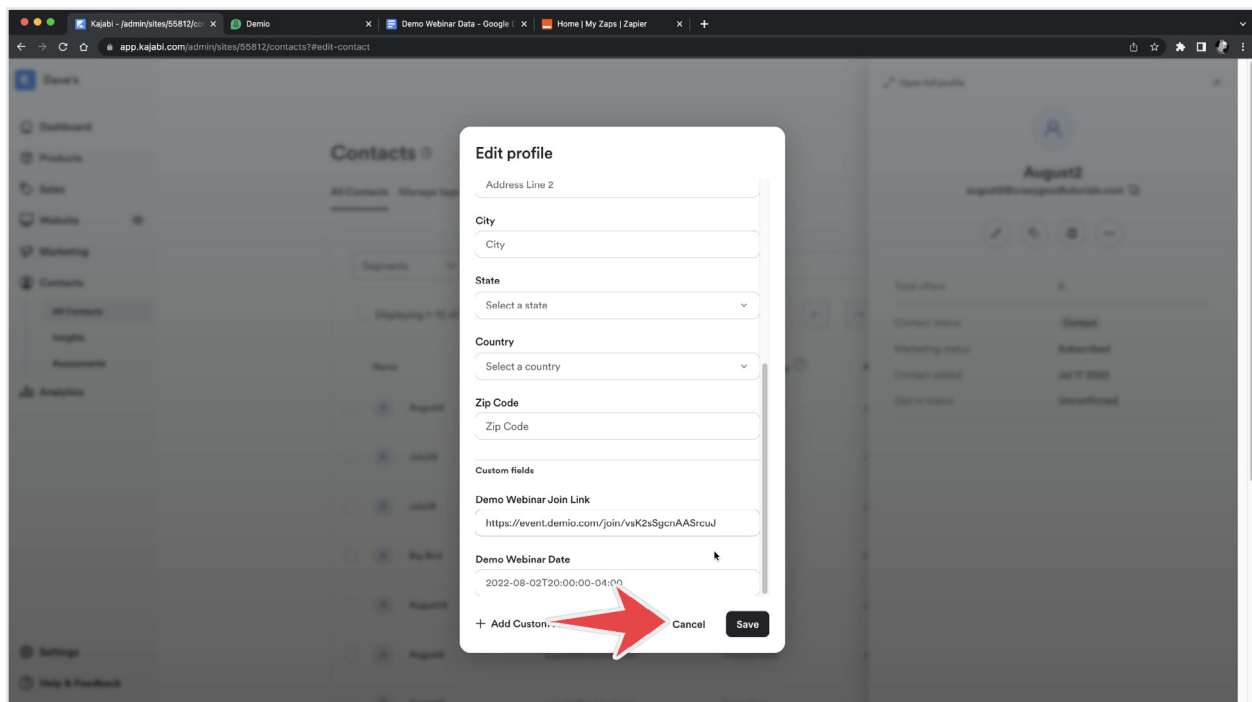
A list will appear with all of the details for the contact:



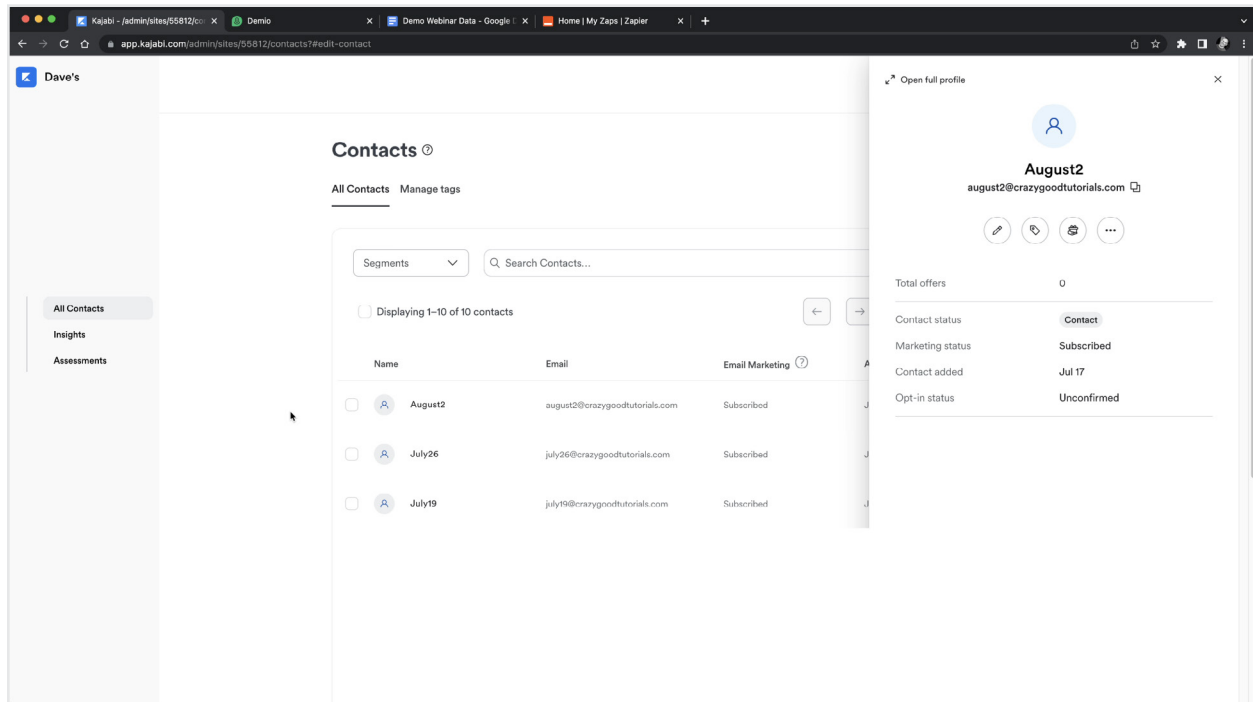
Scroll through the list and verify that the name, email and webinar date all share the same date information and that the webinar join link is populated:



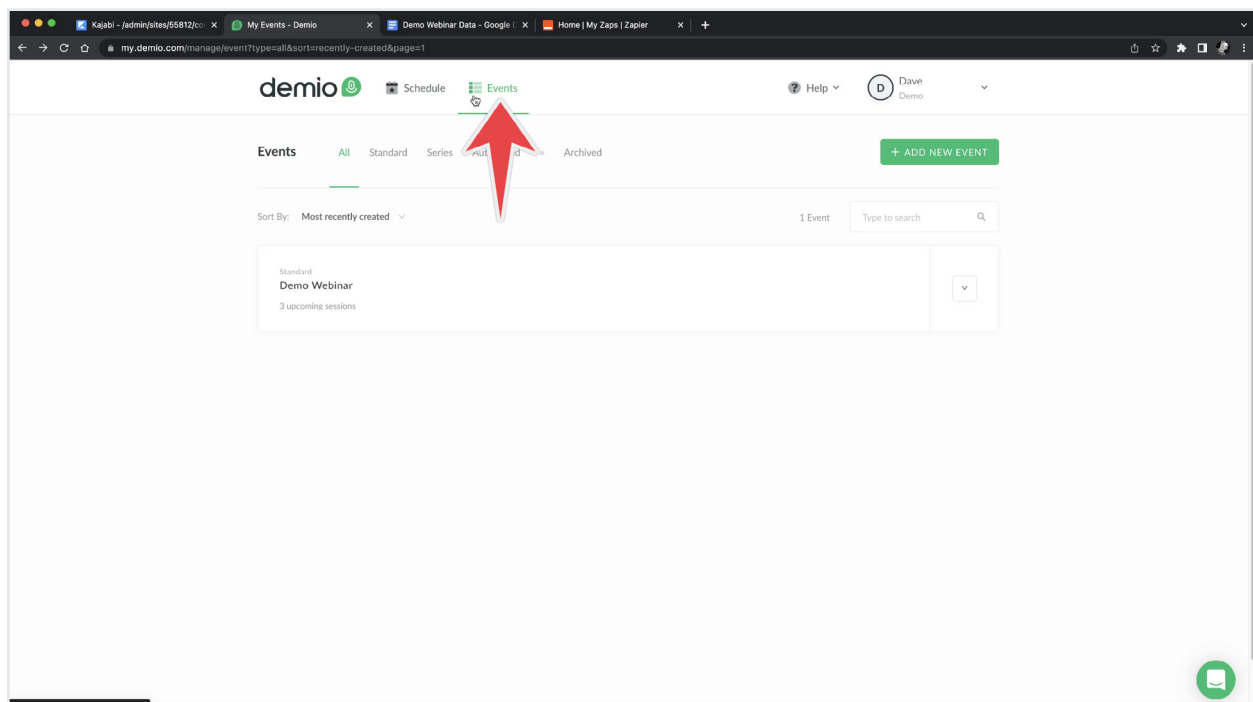
Everything should be perfect, so click on **Cancel**:



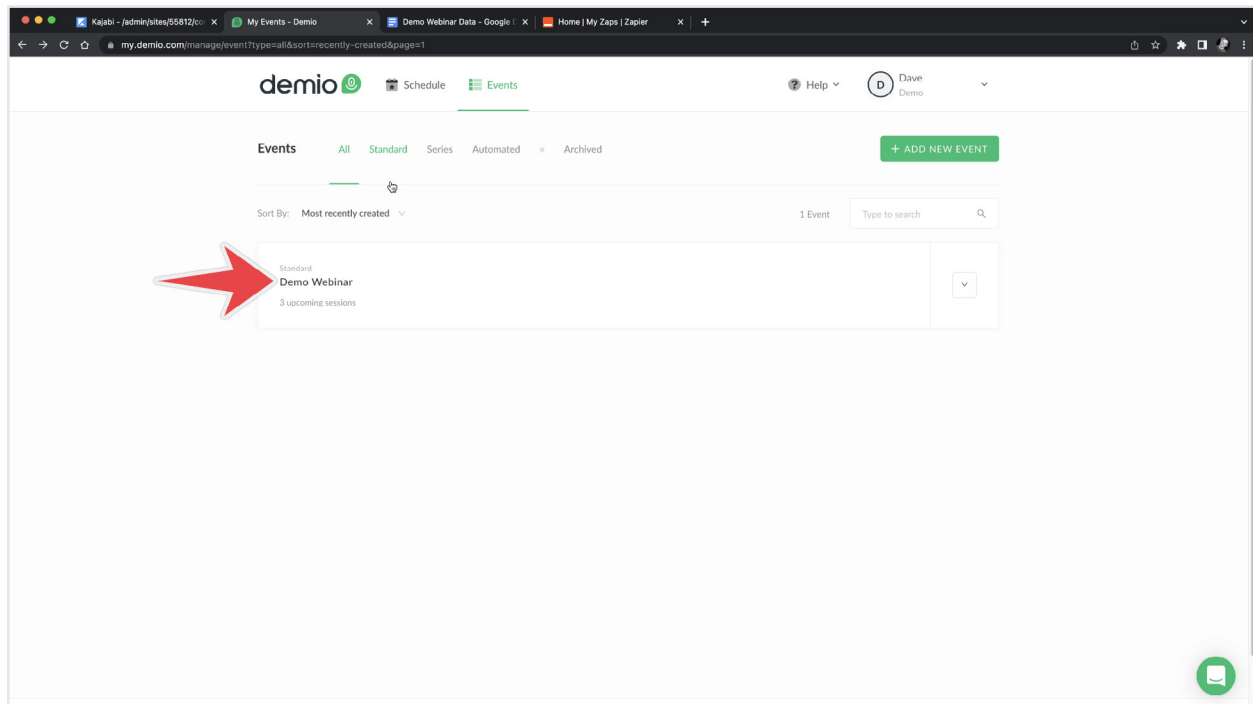
And then repeat the same exact process for the remaining two registrants, verifying that the webinar join link is populated and that the name, email and webinar date all share the same date information:



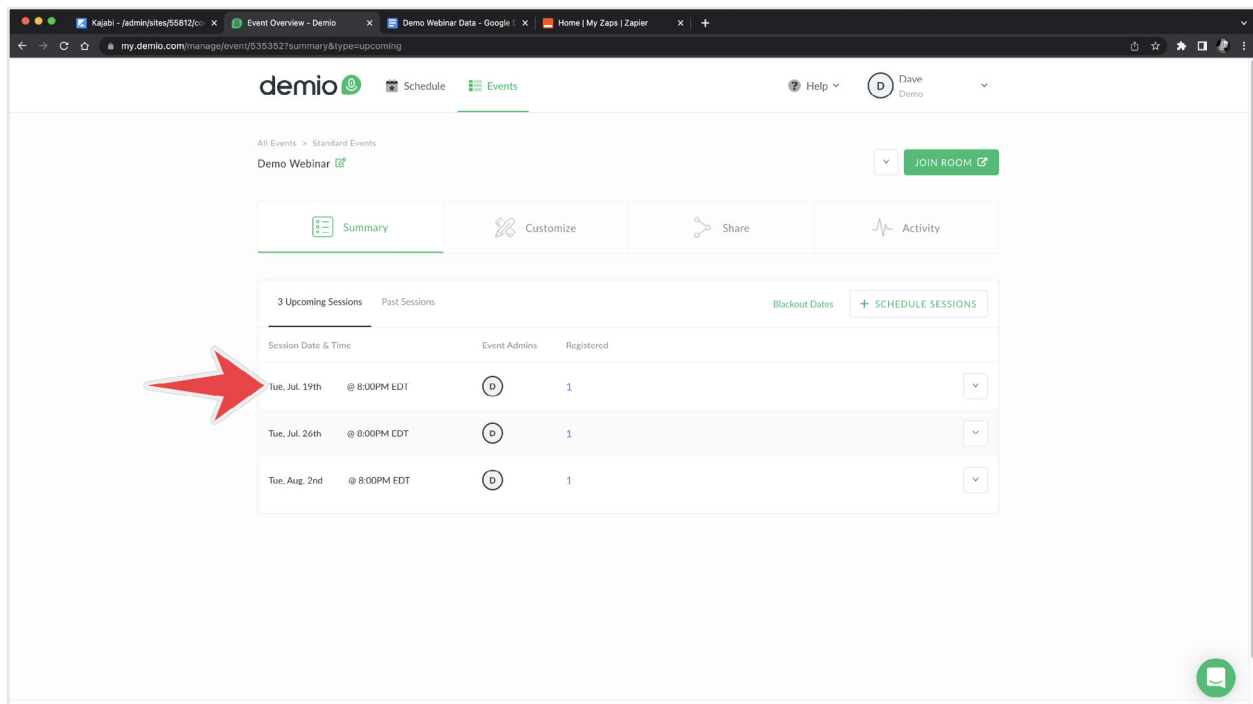
Next, you'll go into Demio to verify that all of the information for the webinar registrants is correct. So go into Demio and click on **Events**:



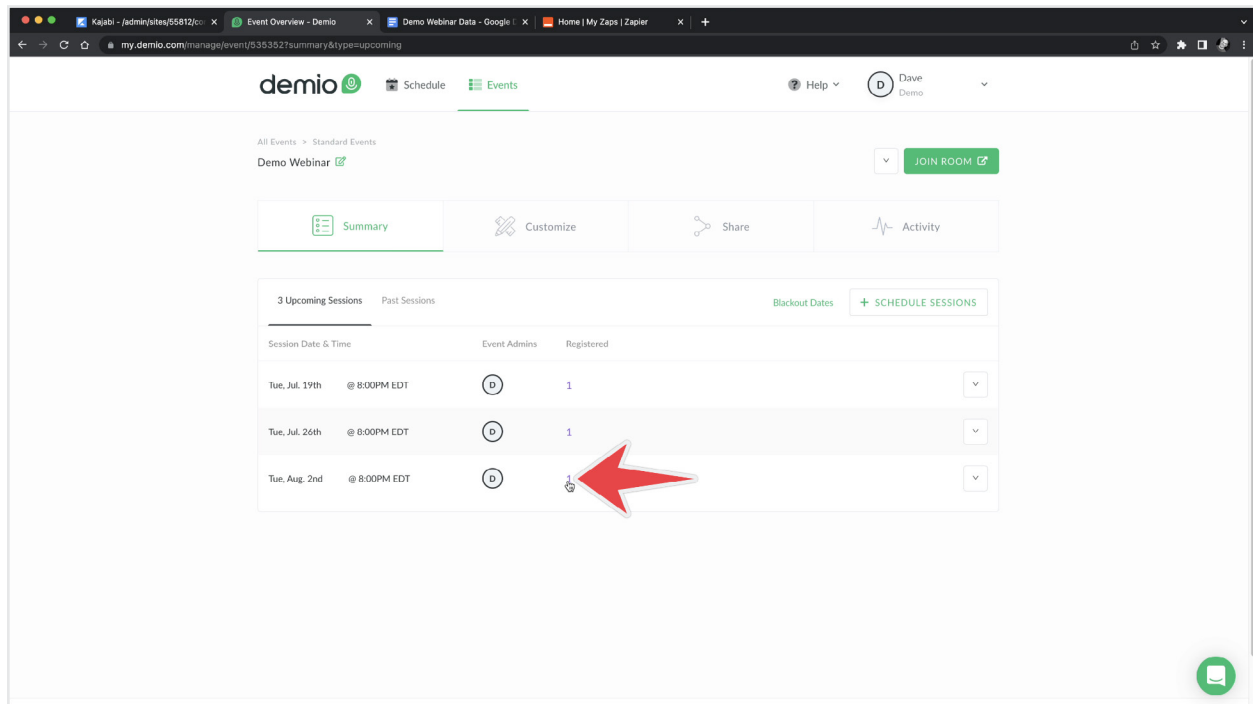
Then go down and click on your webinar event:



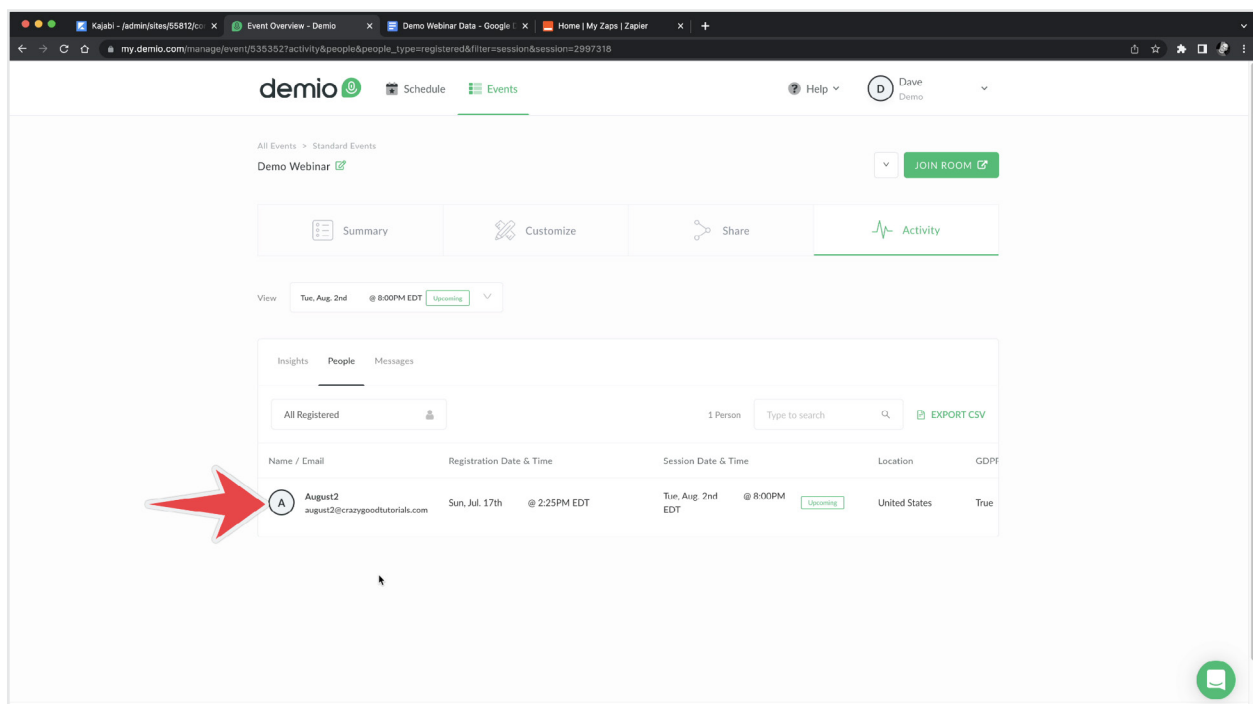
You should see that you have one registrant for each of your three webinars:



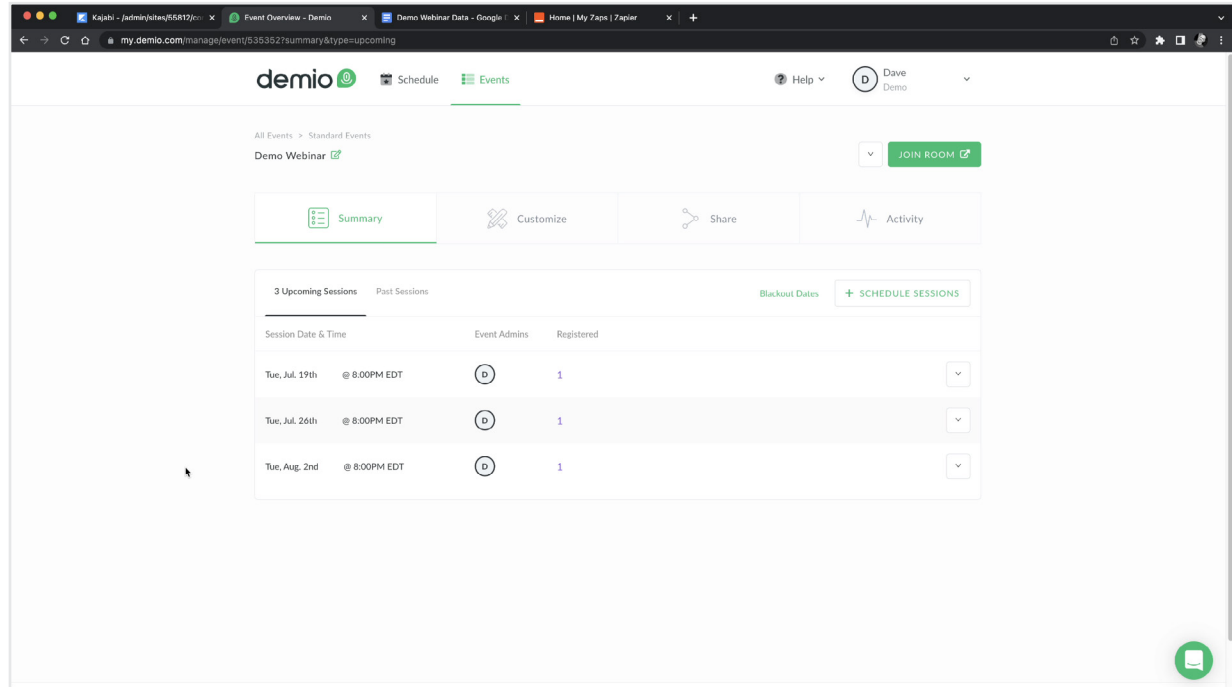
Click on the number next to any registrant:



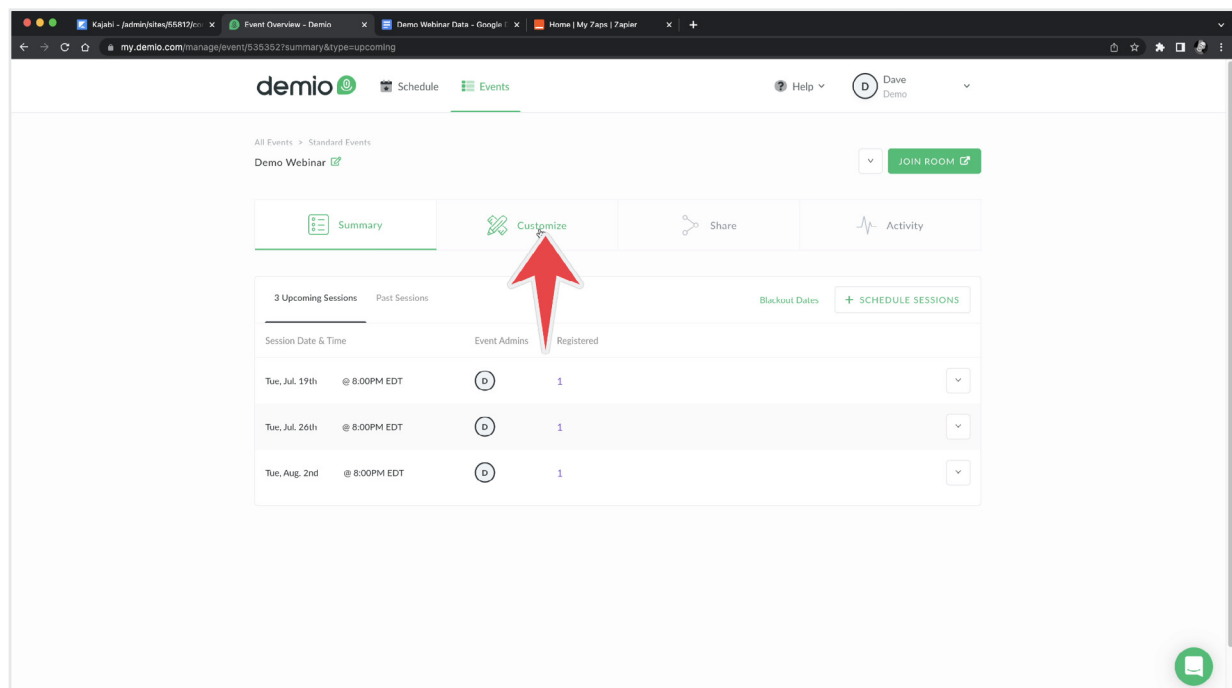
And then verify that the name and email address share the same date information as the actual webinar date:



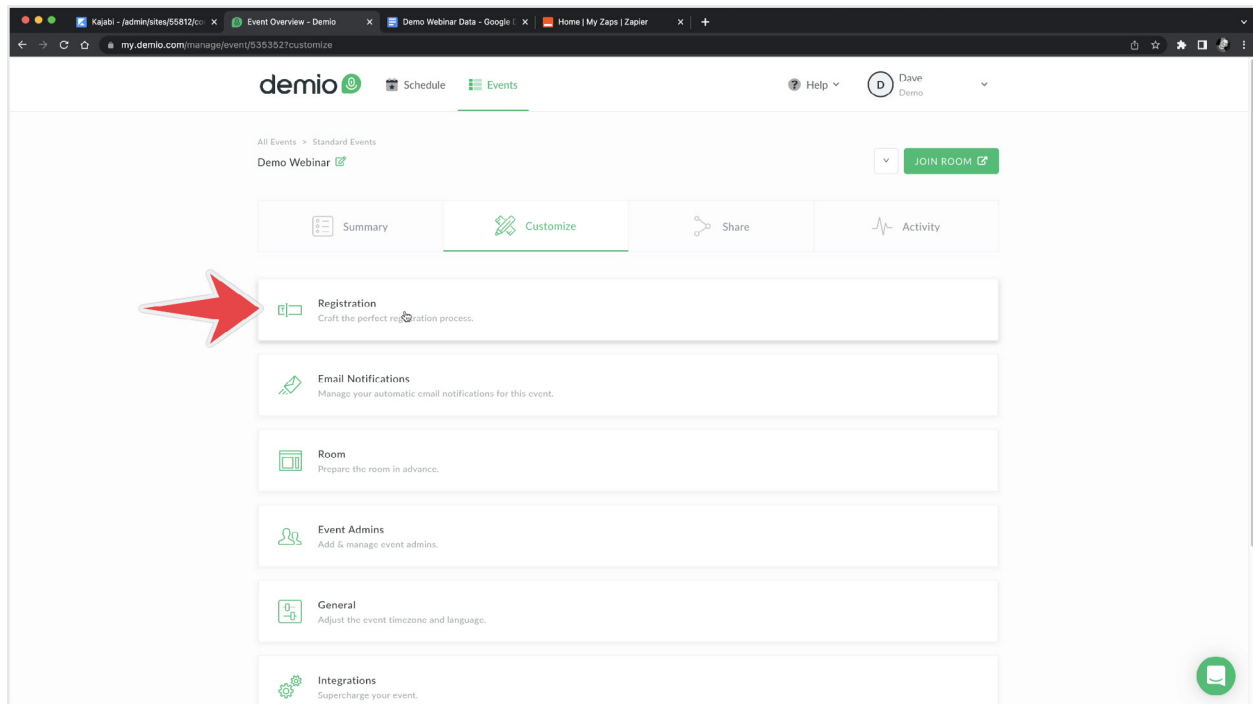
Repeat this same exact process for the remaining two webinar registrants, verifying that their name and email address share the same date information as the actual webinar. This lets you know that all registrant information is being stored in Demio correctly.



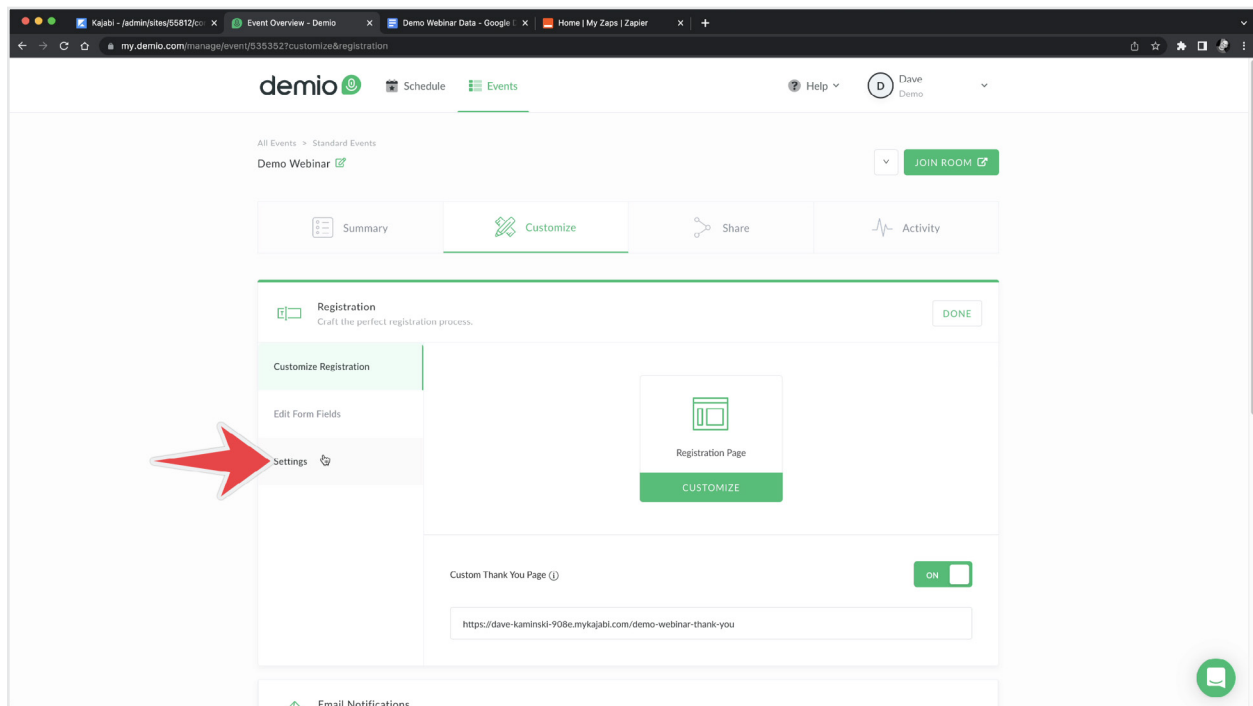
Now there's one final thing you need to do in Demio. First, click on the **Customize** tab:



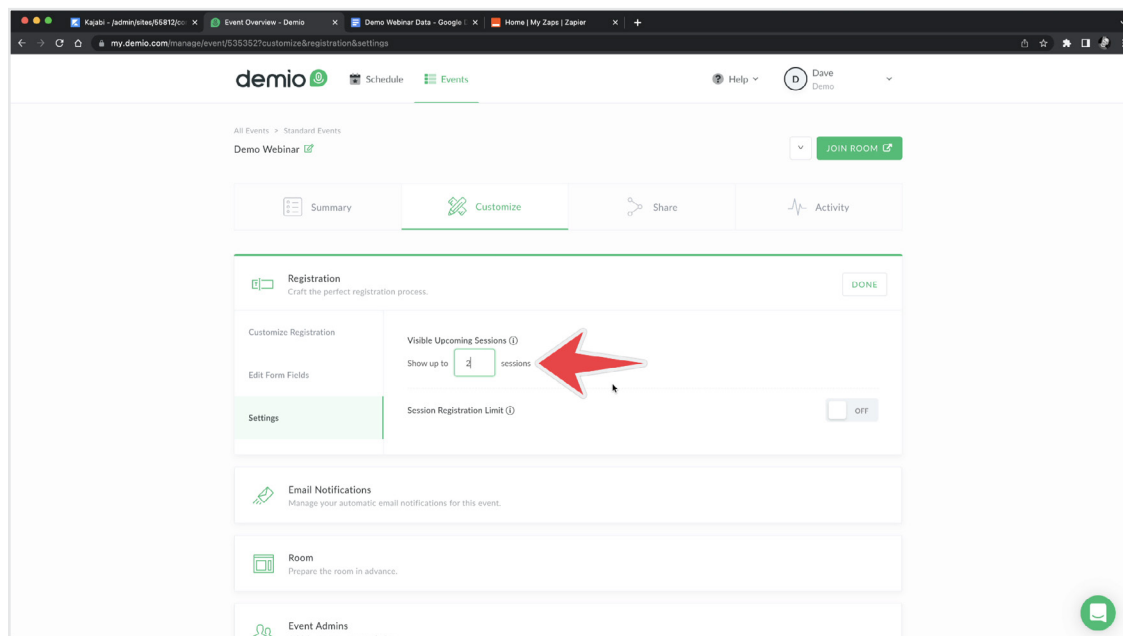
Then select the **Registration** block:



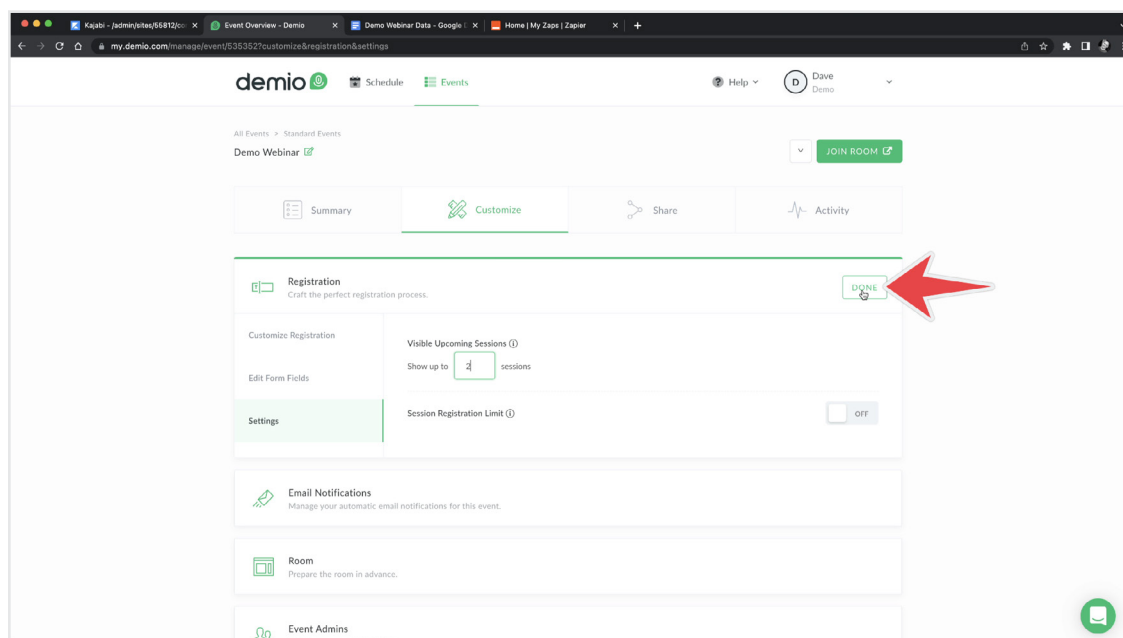
And then click on **Settings**:



When you performed your test, three webinars appeared in the popup on the webinar registration page. But Amy recommends that you only show your two soonest webinars in the popup. So to make this happen, for the **Visible Upcoming Sessions**, change the number to **2**:



Then click on **Done**:



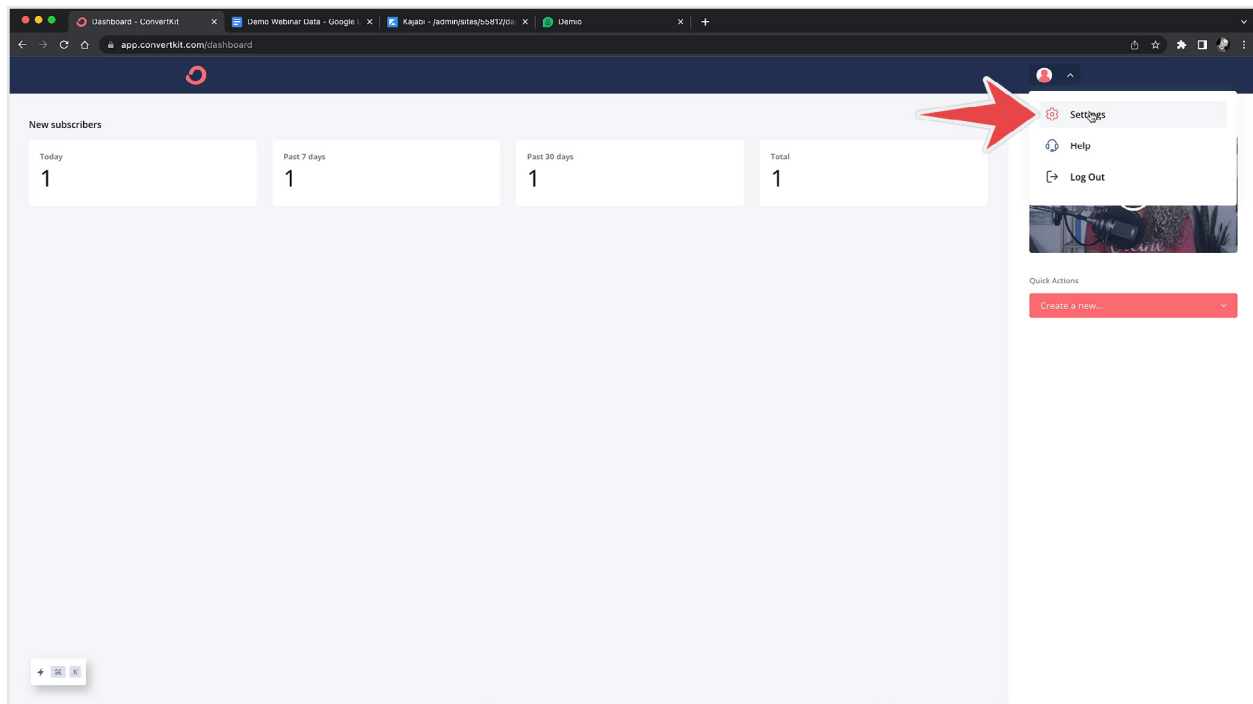
And that's it for **Step 2**. Now you can move onto **Step 3** of this guide, where you'll learn how to set up all of your marketing related emails for your webinars in Kajabi.

STEP 2

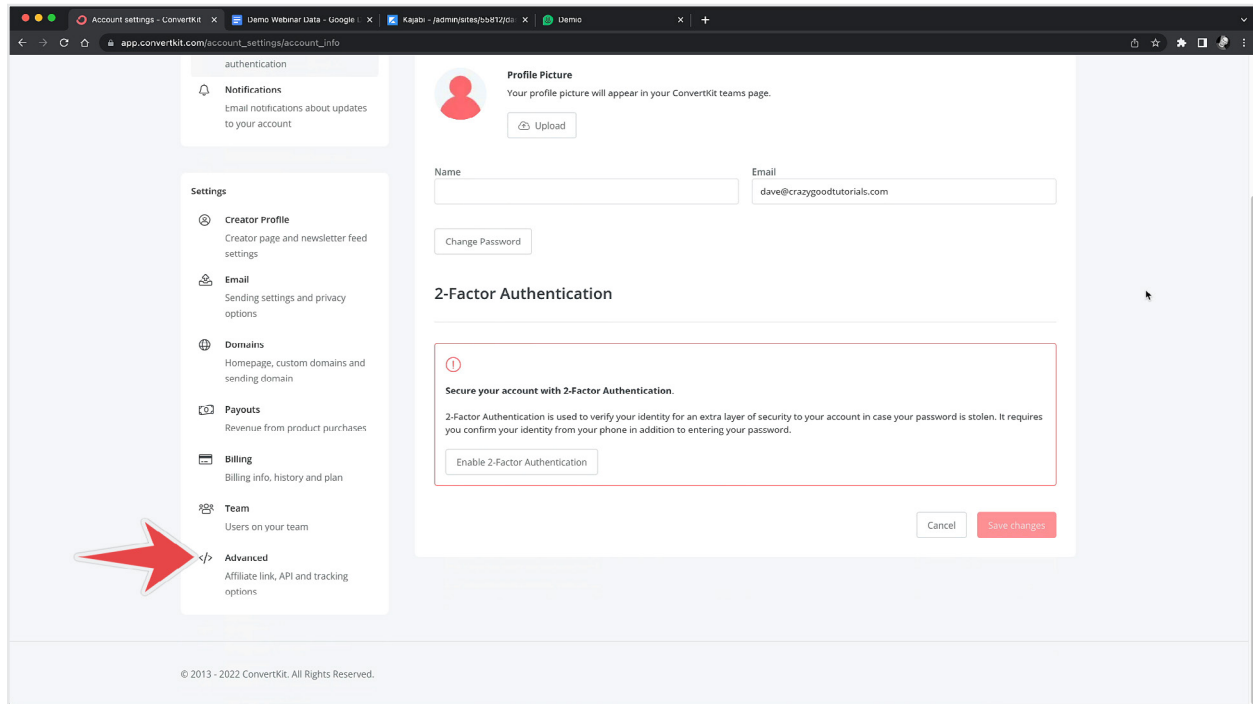
Connecting ConvertKit, Demio and Kajabi Through Zapier

In **Step 2**, you are going to integrate ConvertKit, Demio and Kajabi through a free service called Zapier. The reason why you'll do this is so Demio can pass on webinar registrant information to ConvertKit, which will then be used in emails that you send through ConvertKit. The reason why Kajabi is included here is because Kajabi knows who purchased your course. That information has to be passed to ConvertKit, so you don't send marketing emails to people who have already purchased your course.

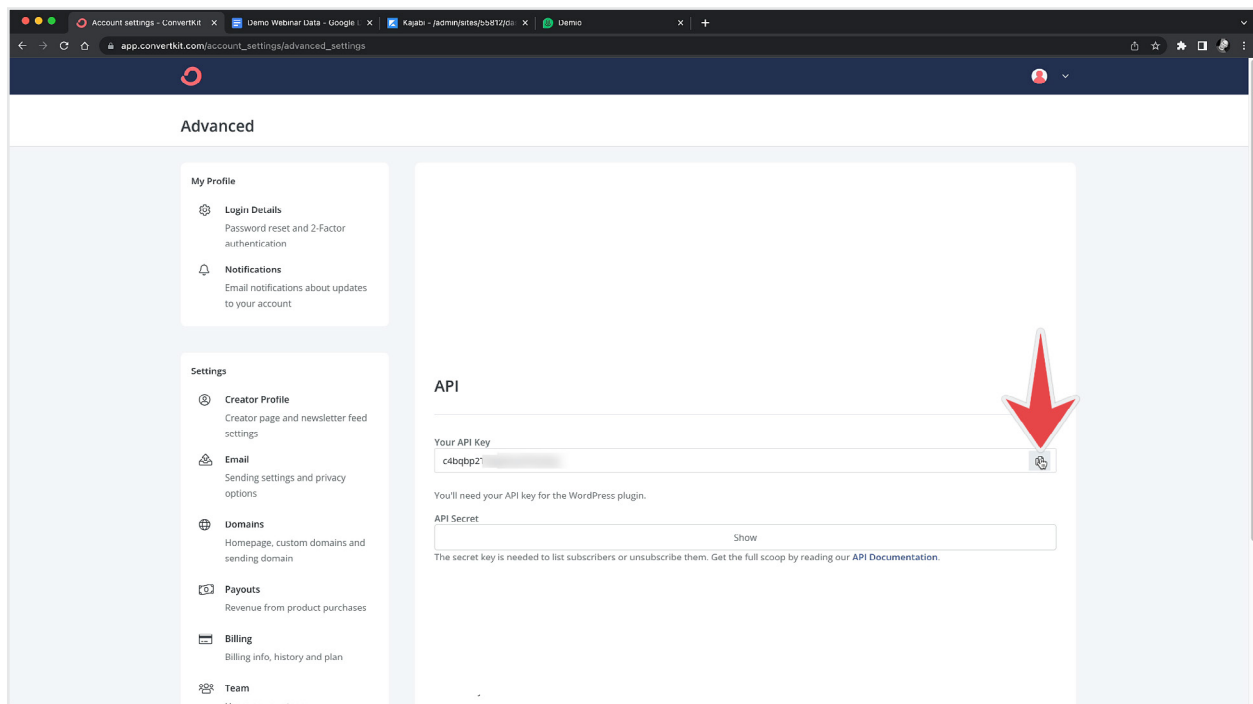
For **Step 2**, we are going to begin in ConvertKit. Go to the upper right hand corner, click on the carrot next to your avatar and then click on **Settings**:



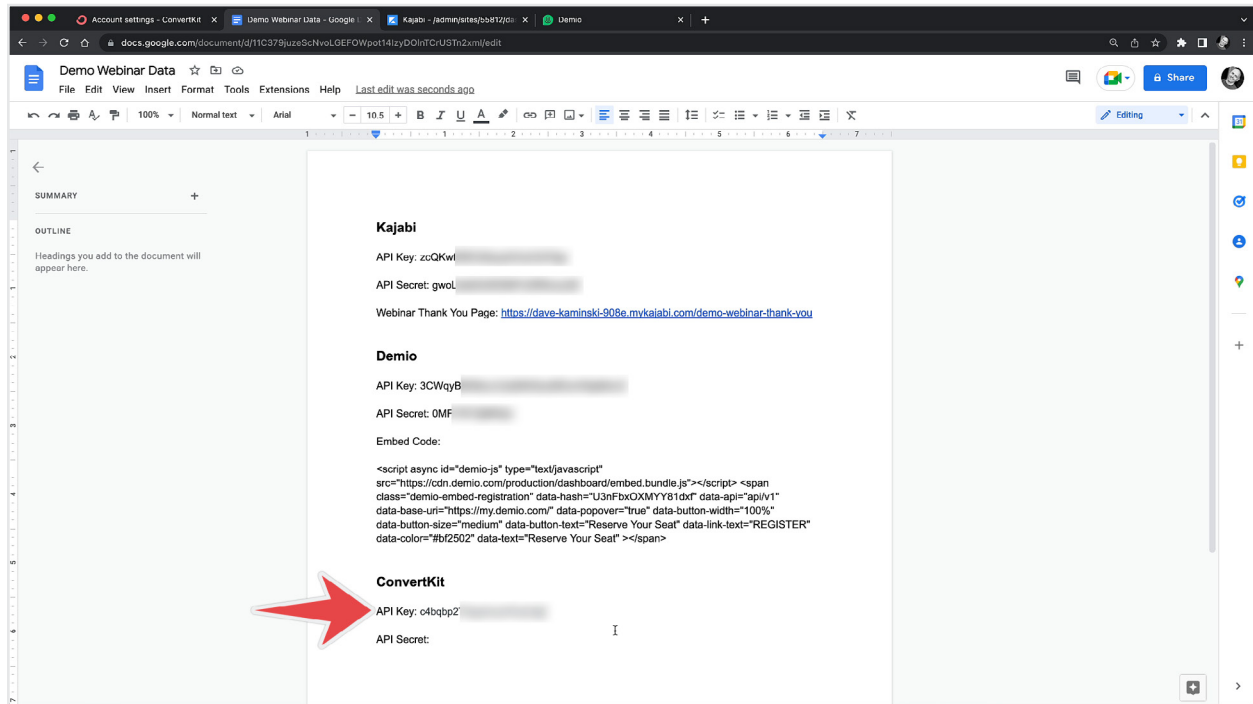
On the next page that appears, scroll down to the bottom. In the lower left hand corner, click on **Advanced**:



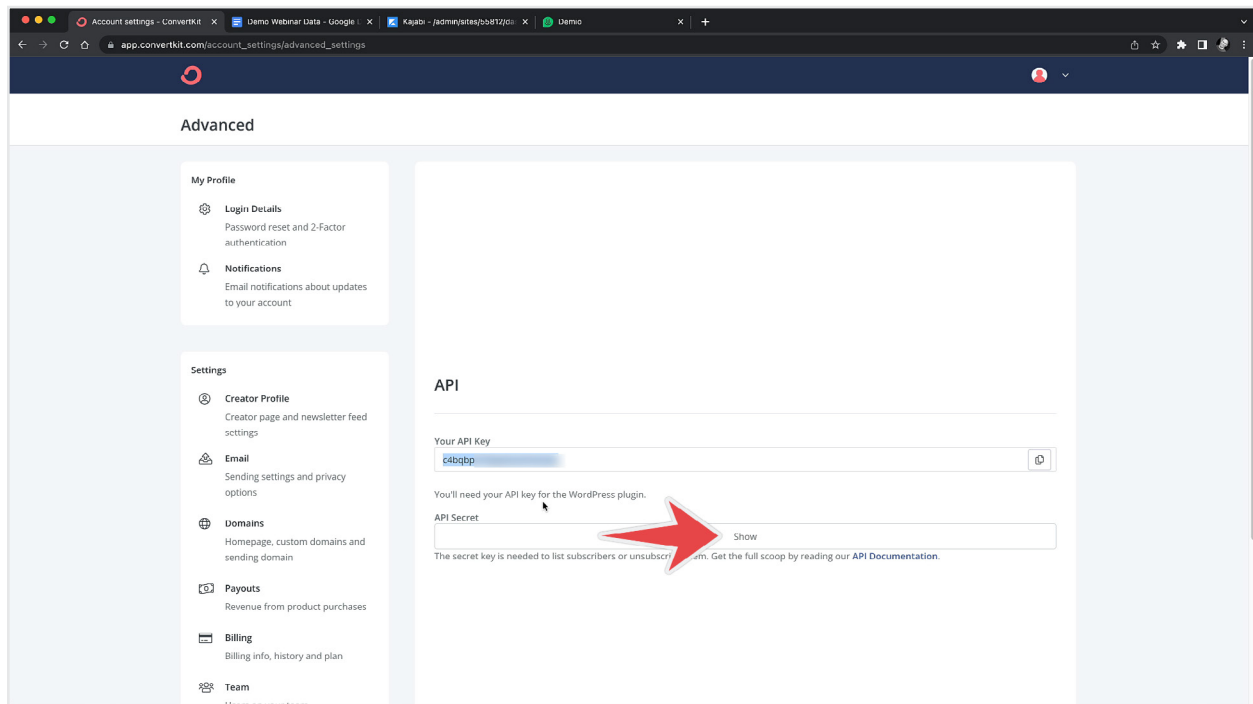
Go to the **API** section. Then go to your **API key** and click the icon to copy it:



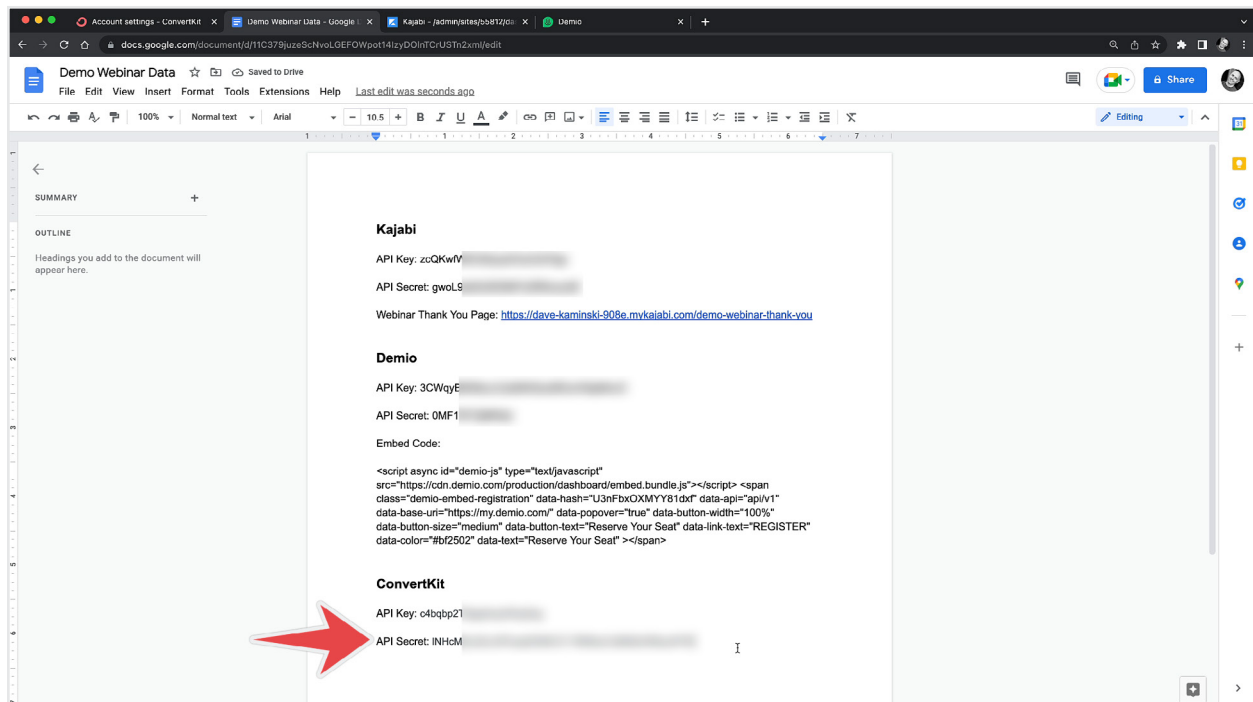
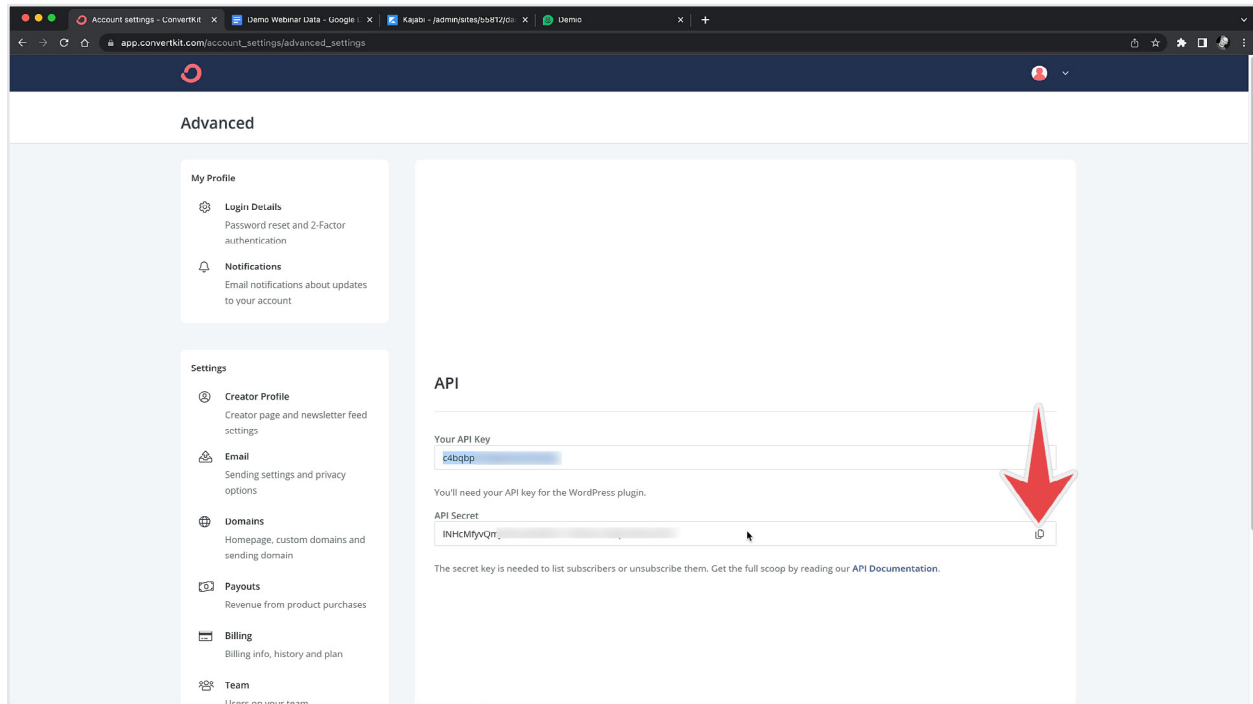
Now go into the Google Doc that you created in **Step 1**. And paste in that **API key** for ConvertKit:



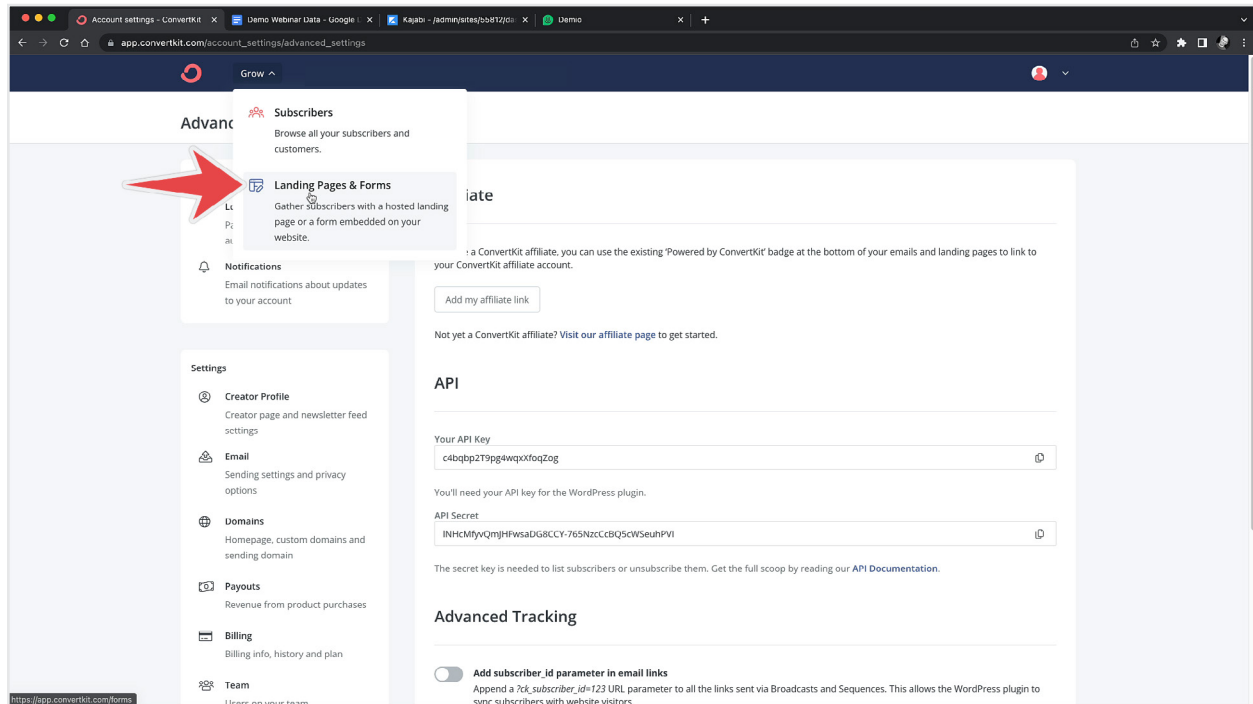
Go back to ConvertKit, where now you'll copy the **API Secret** key. To do that, first you need to go over and click on **Show**:



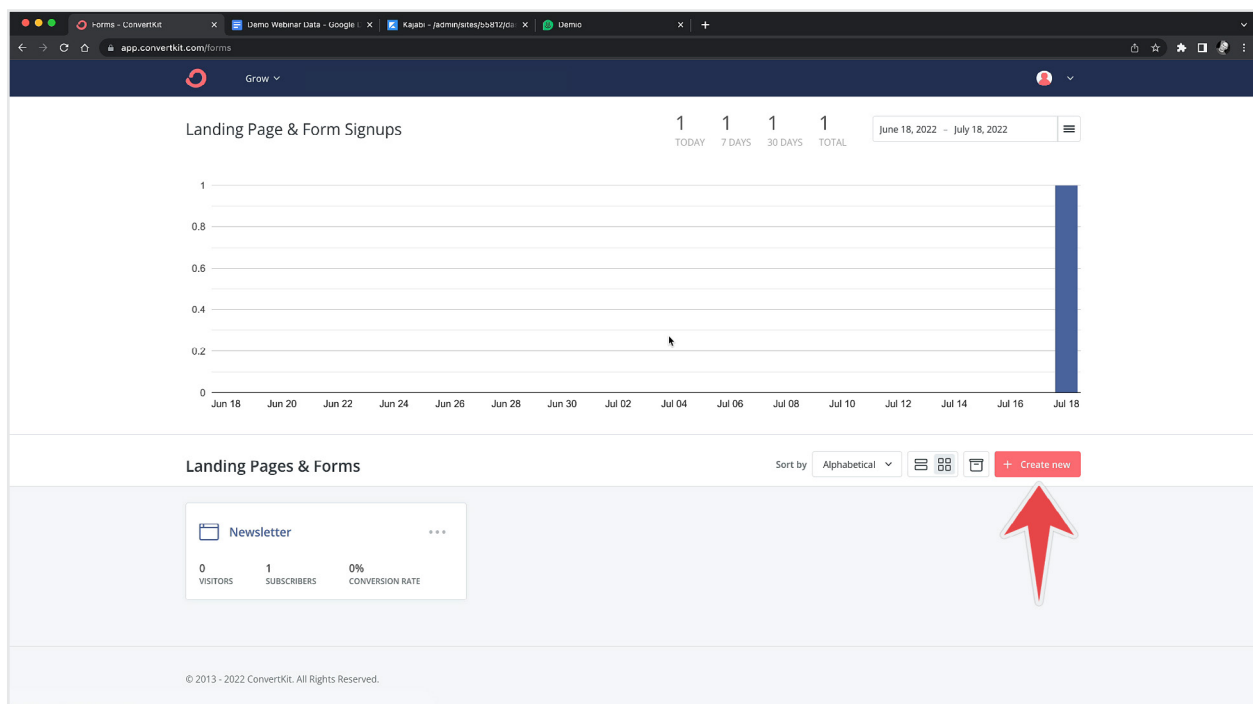
The key will appear. Click on the copy icon to copy it and then paste your **API secret** into your Google doc:

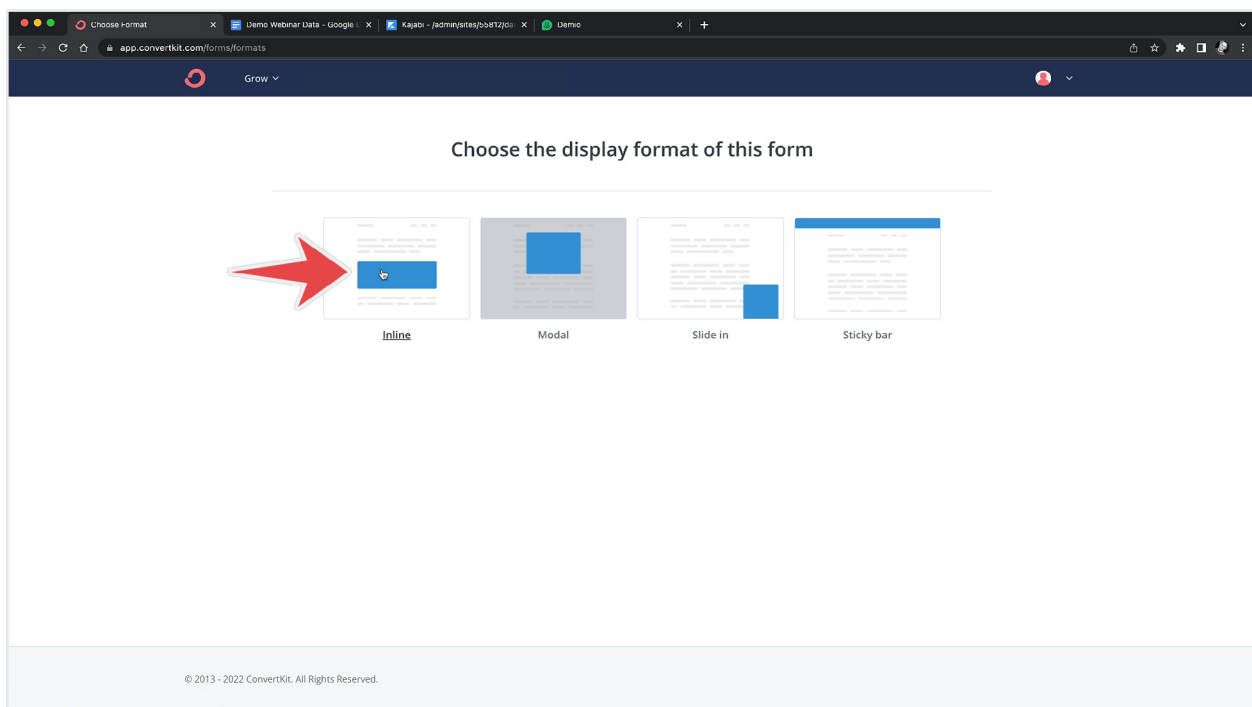
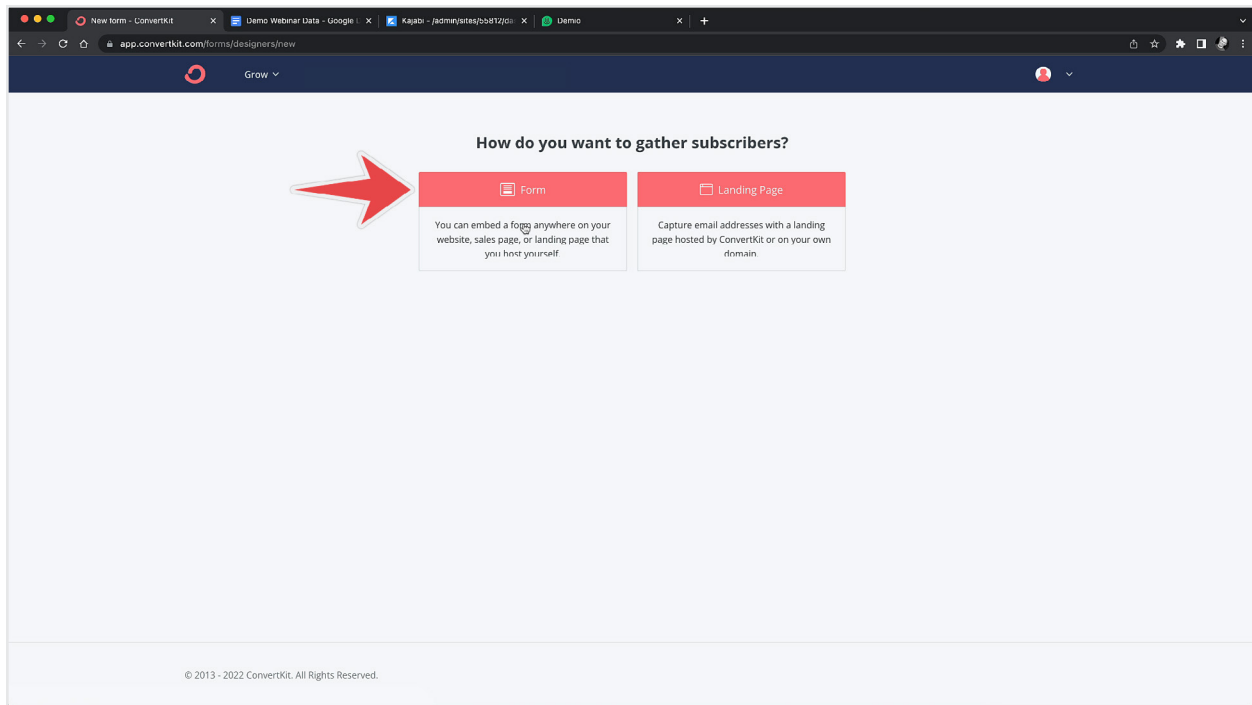


Back in ConvertKit, go to the menu at the top and click on **Grow**, then go down and select **Landing Pages and Forms**:

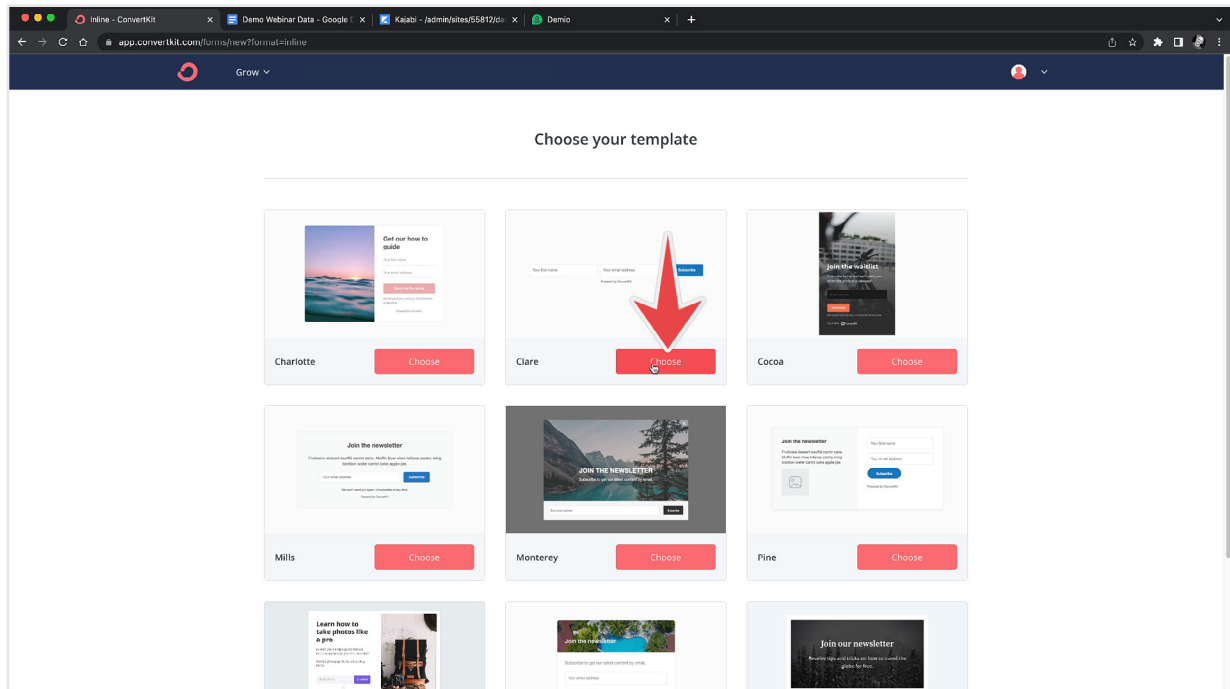


Click the **Create New** button, then click on **Form**, then go over and click **Inline**:

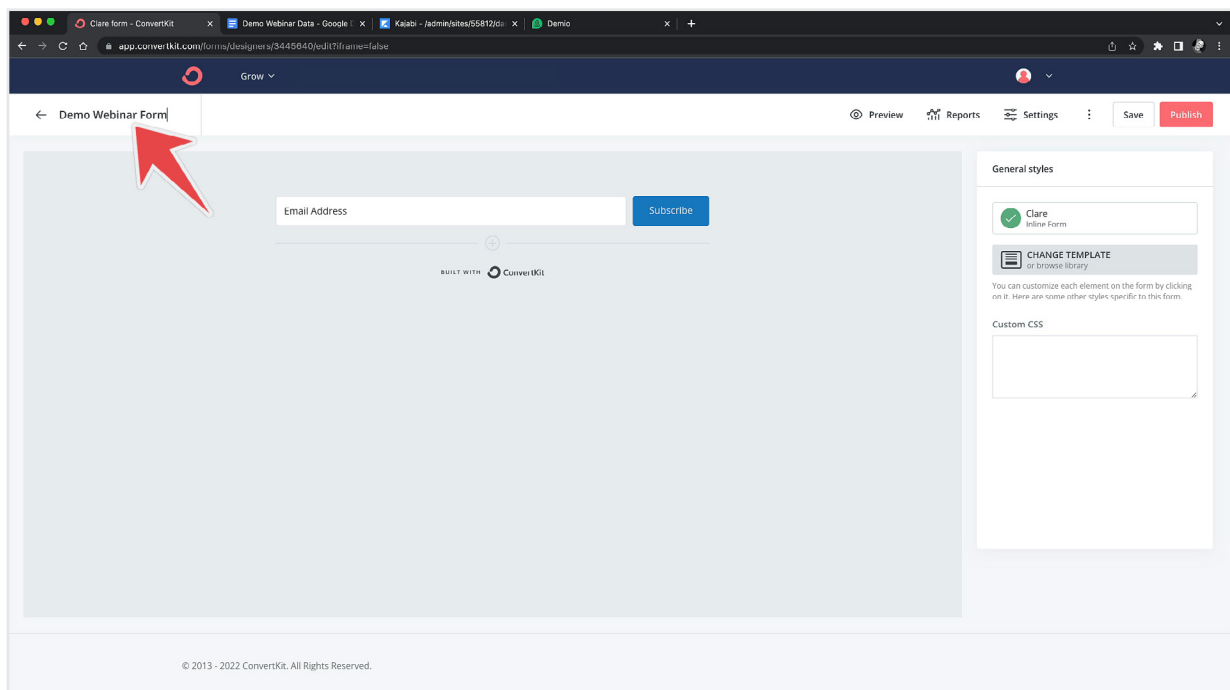




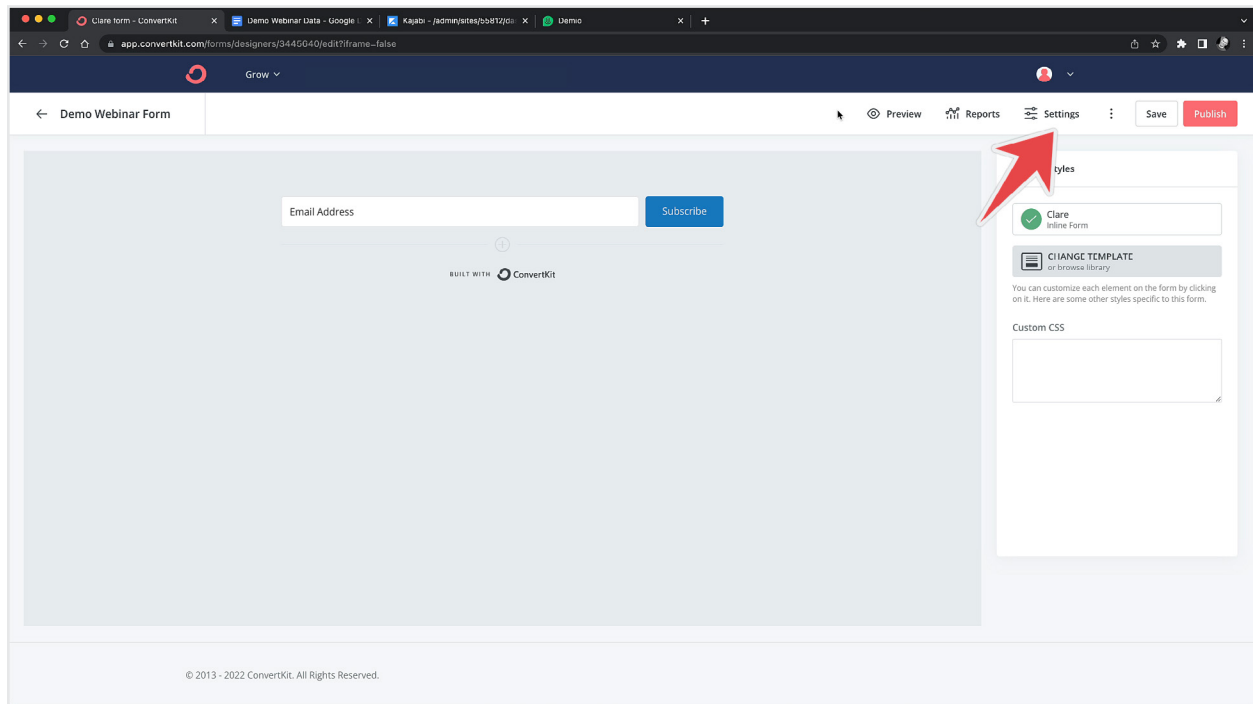
You can use any form because no one will ever see it, we'll be using it behind the scenes,, but in this example we'll be using the **Clare** form because it's the simplest. Click on **Choose** for the form:



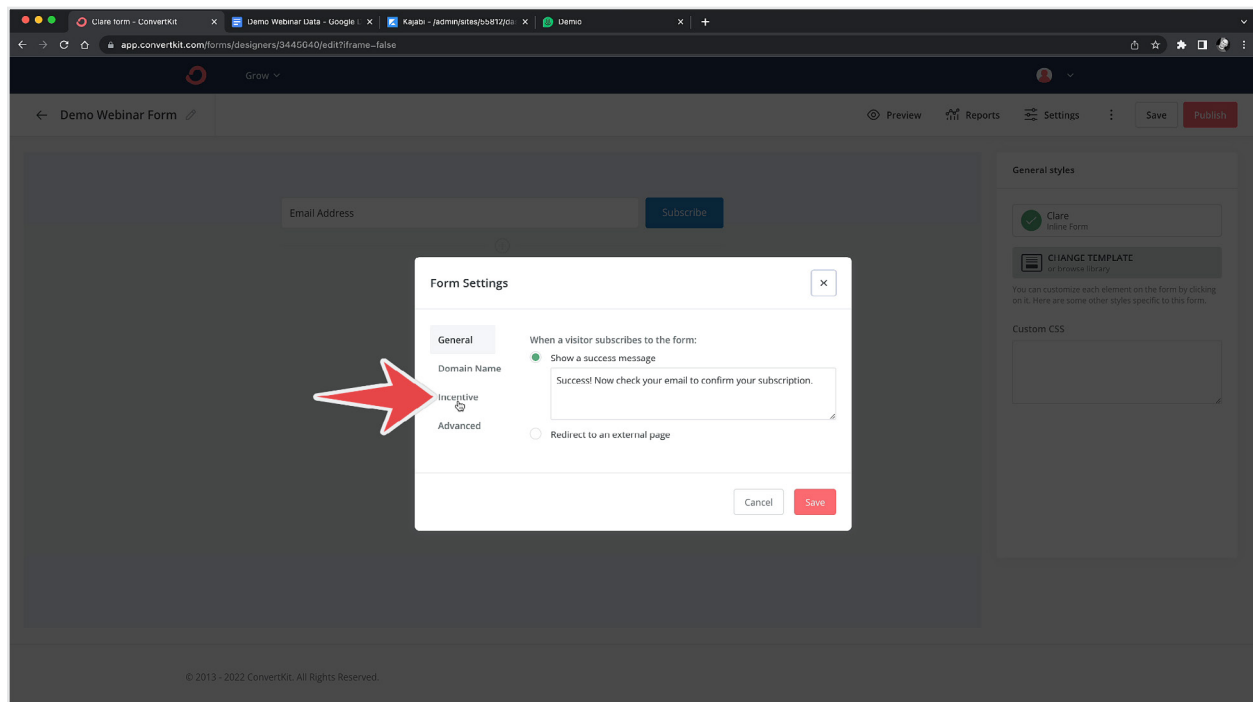
Go to the upper left hand corner, click on the pencil and give the form a new name that makes sense to you. For example, I've named mine Demo Webinar Form:



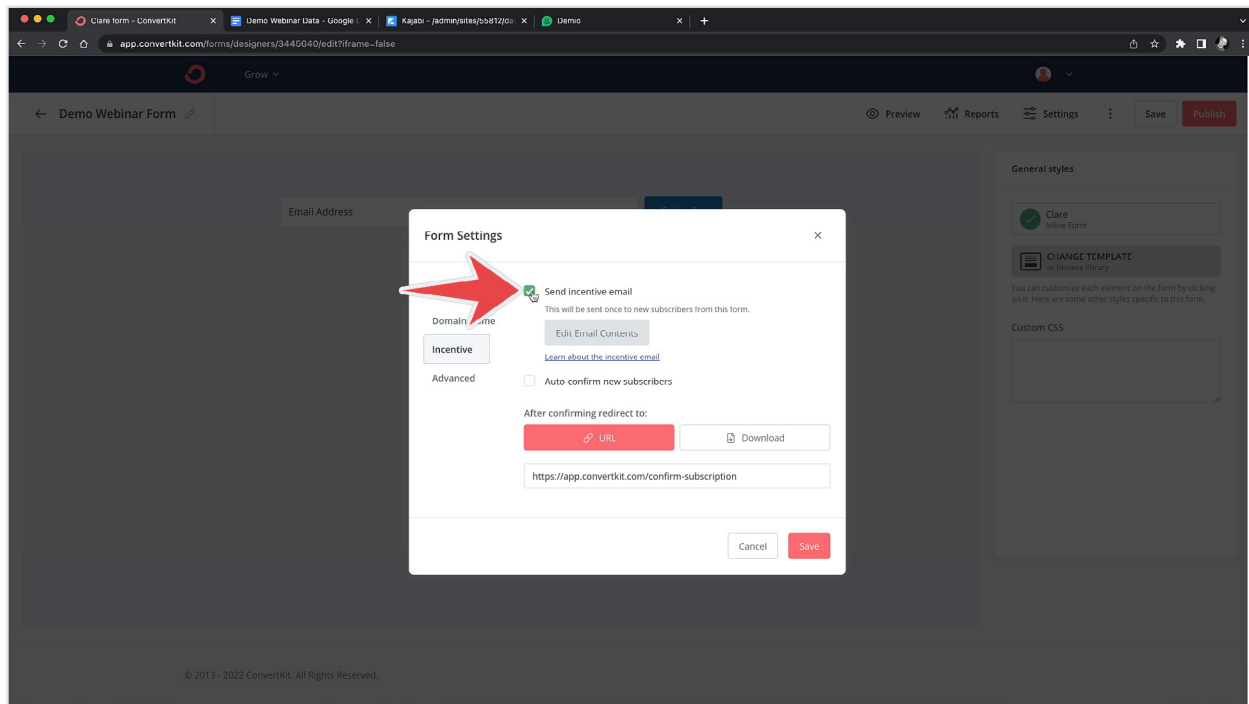
Then go to the right hand side of the screen and click on **Settings**:



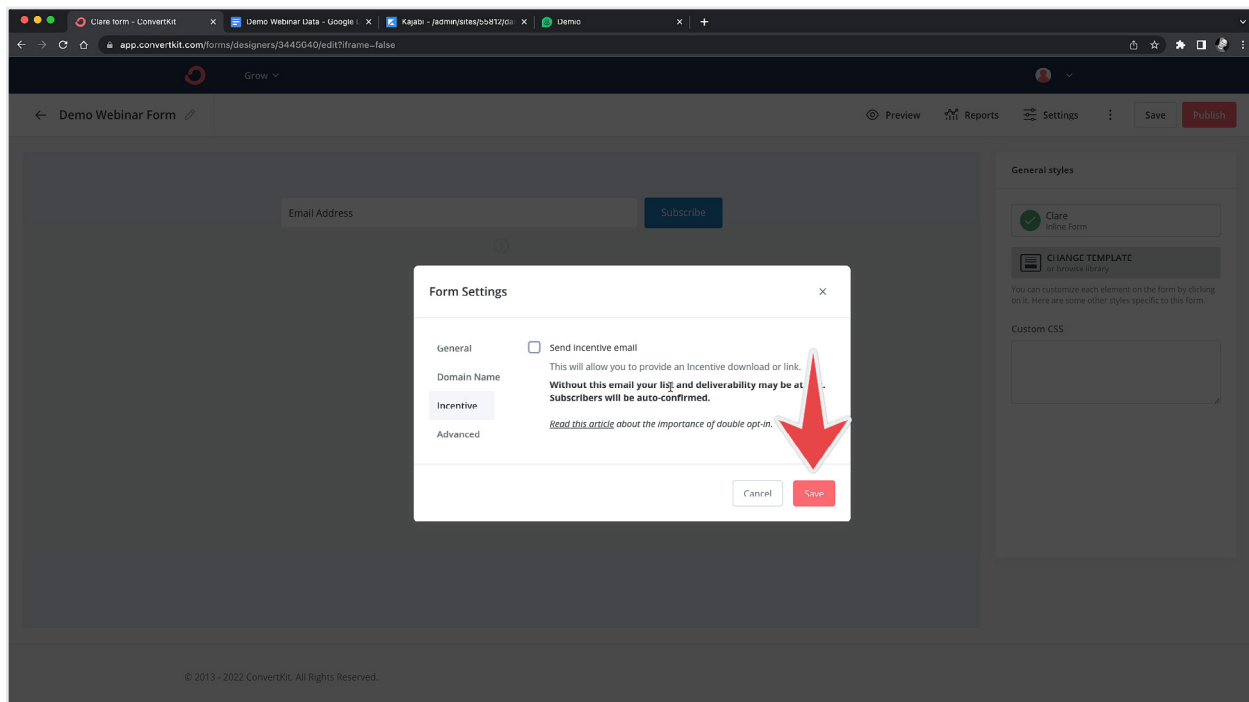
In the dialogue that appears, click on **Incentive**:



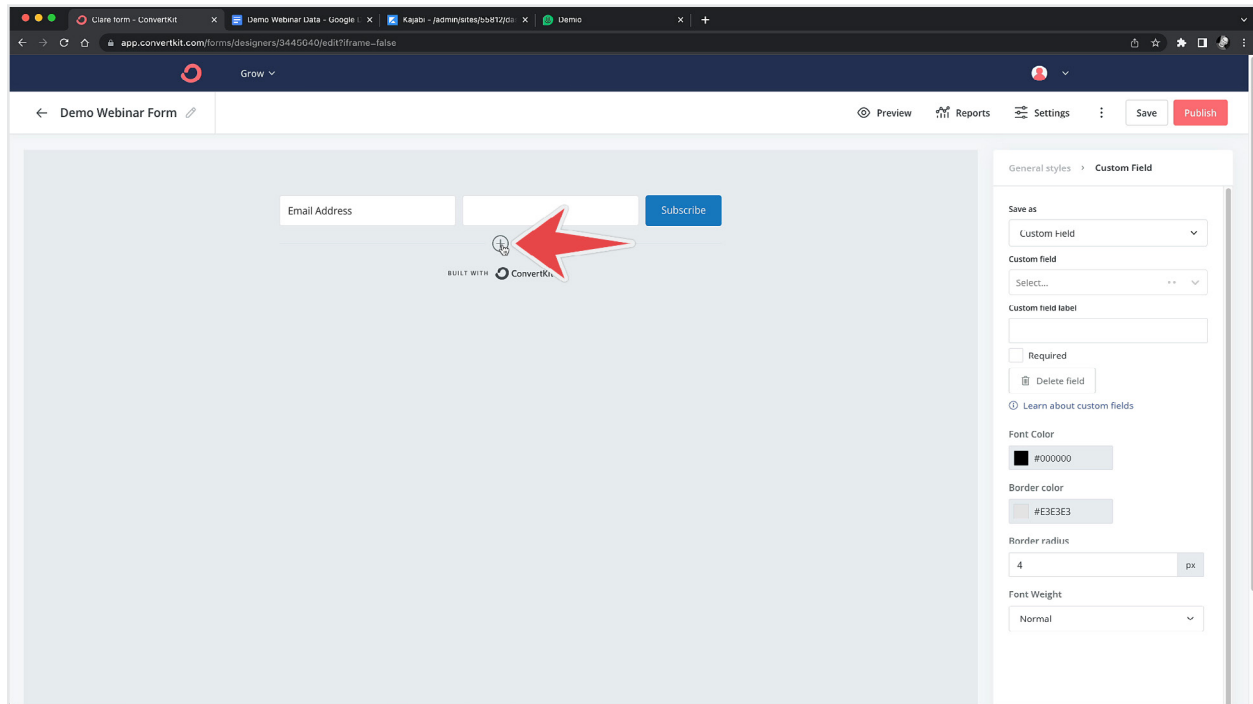
Then **UNCHECK** Send Incentive Email:



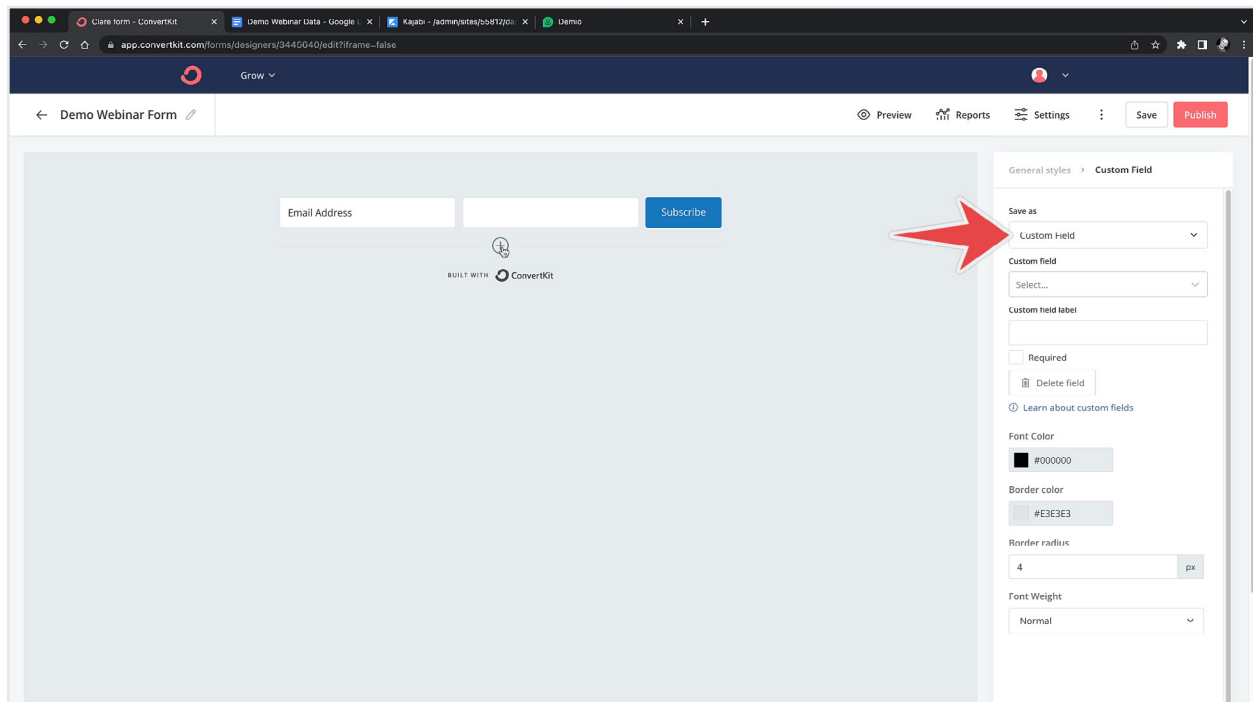
Then go down and click **Save**:



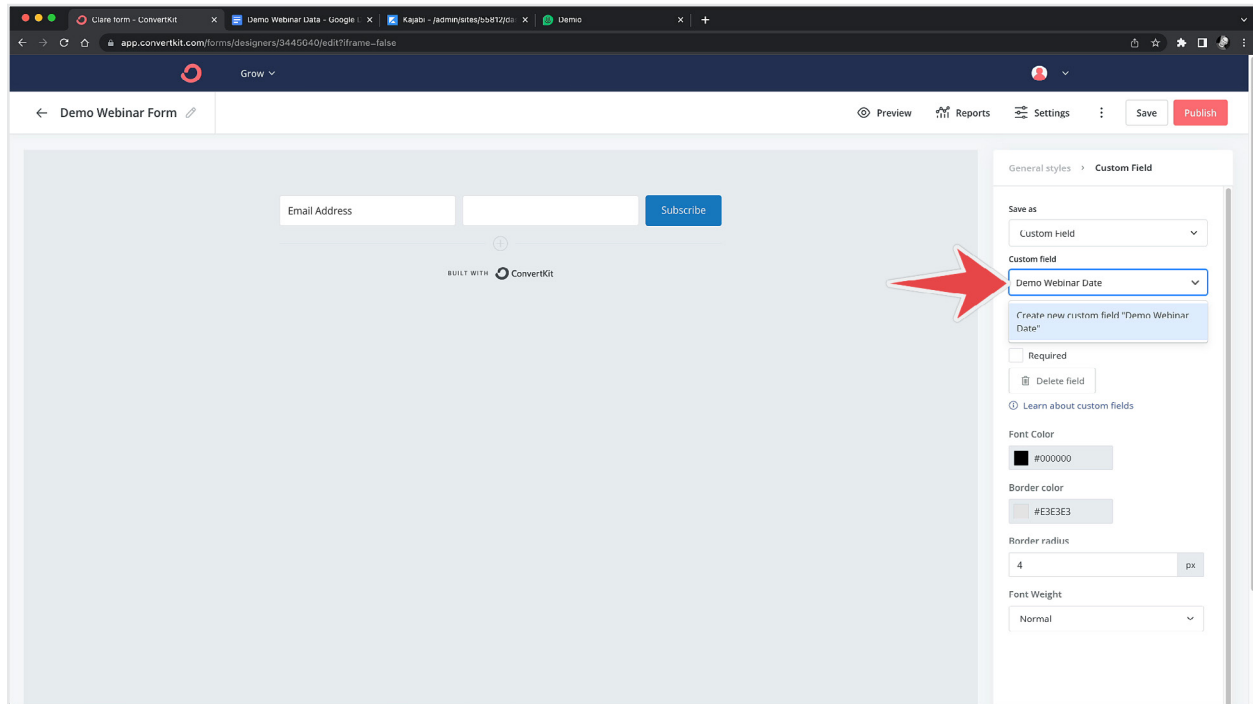
Next you need to add two custom fields to this form. One for your **webinar date** and the other for your **webinar join link**. So to do that, go into the canvas area to the little plus sign icon and click on it:



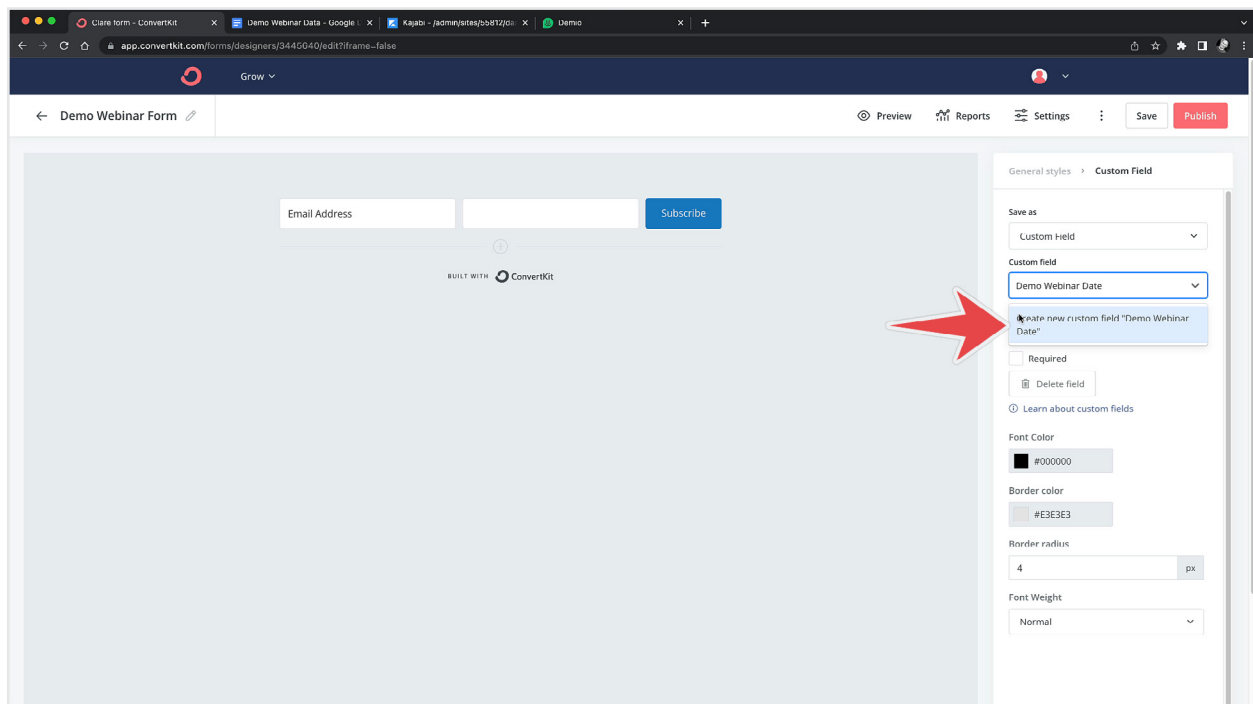
Then go to the panel to the right and make sure that **Custom Field** is listed:



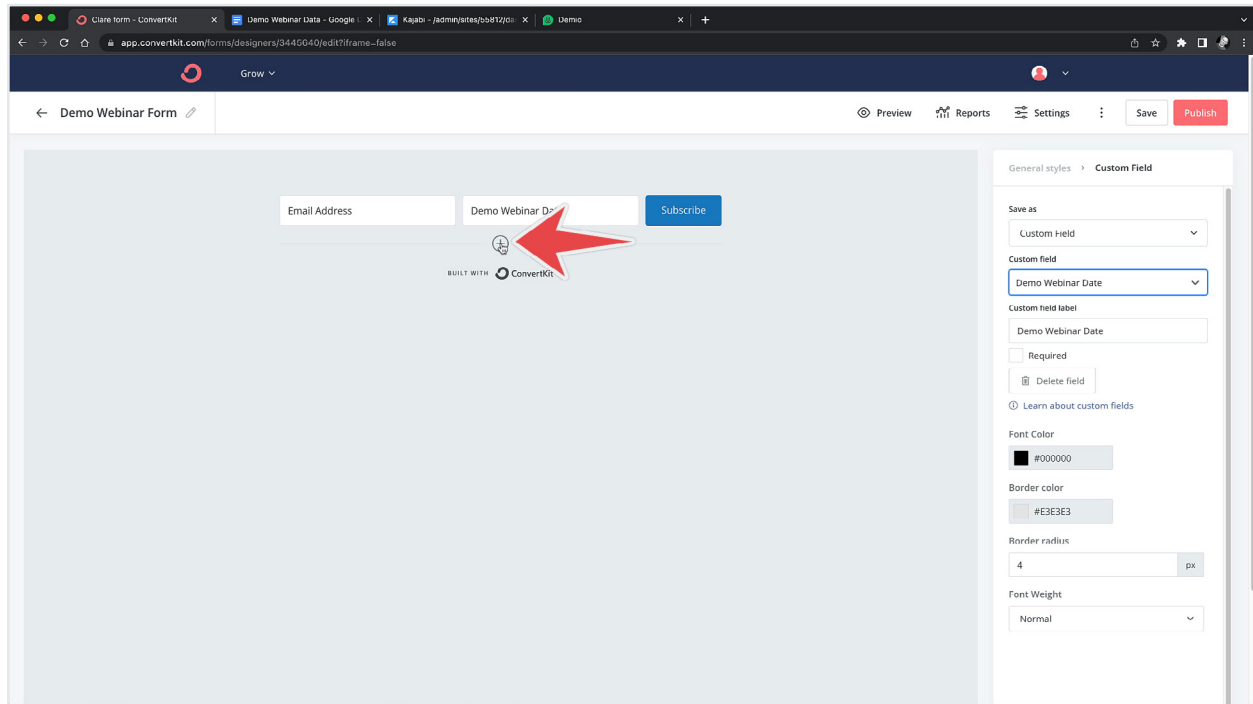
Then go down to the **Custom Field** box, click on it and type in the name for your date field. For example, I've entered Demo Webinar Date:



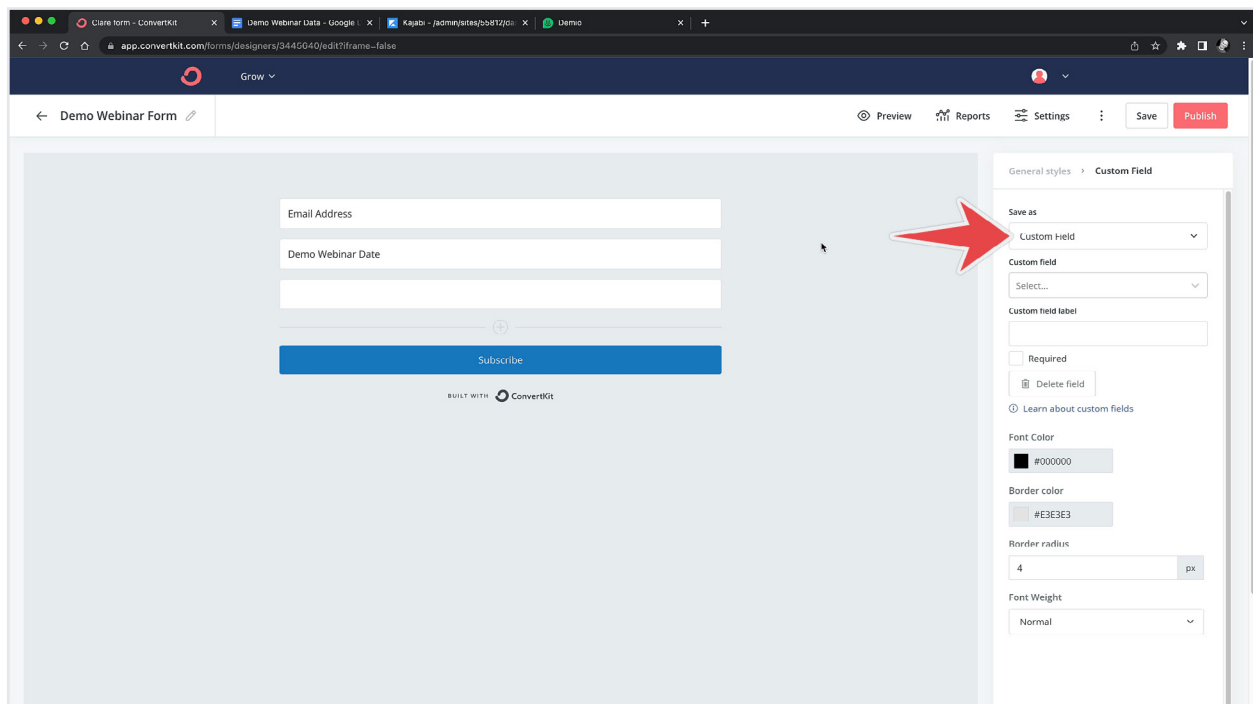
Now go to the blue box below that and click on it:



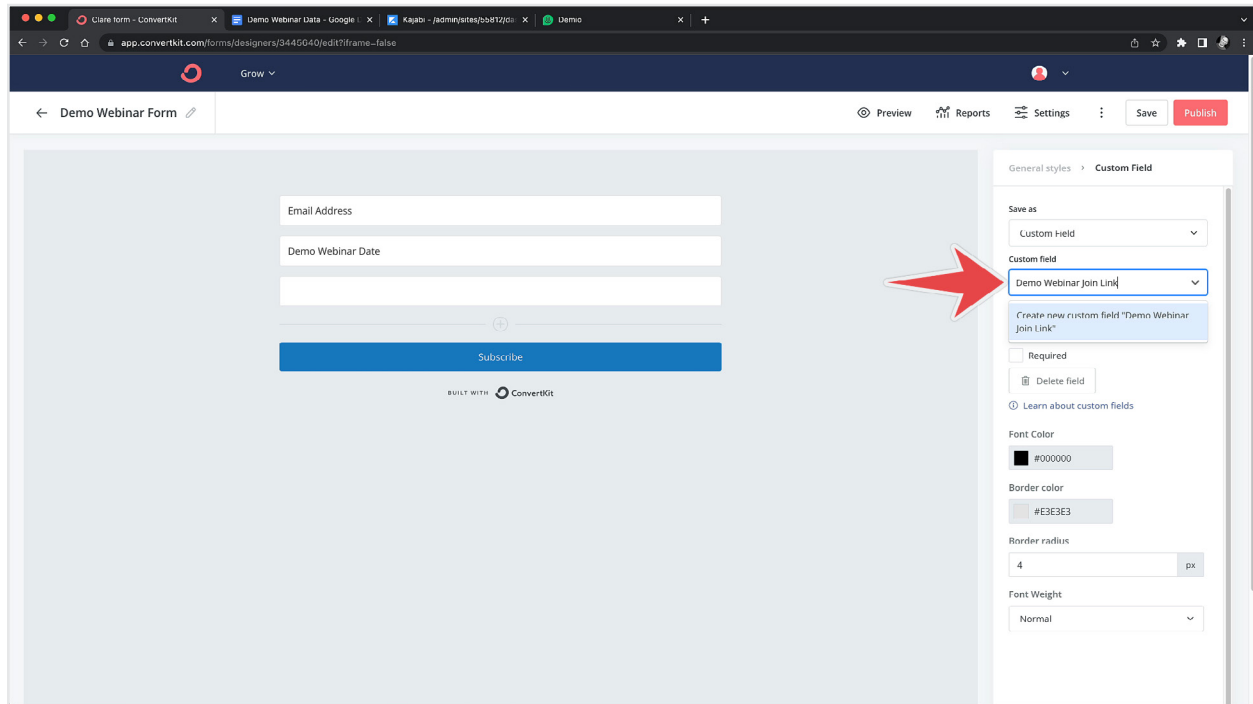
You need to do this one more time for your **webinar join link**. So once again, go to the canvas and click on the plus icon:



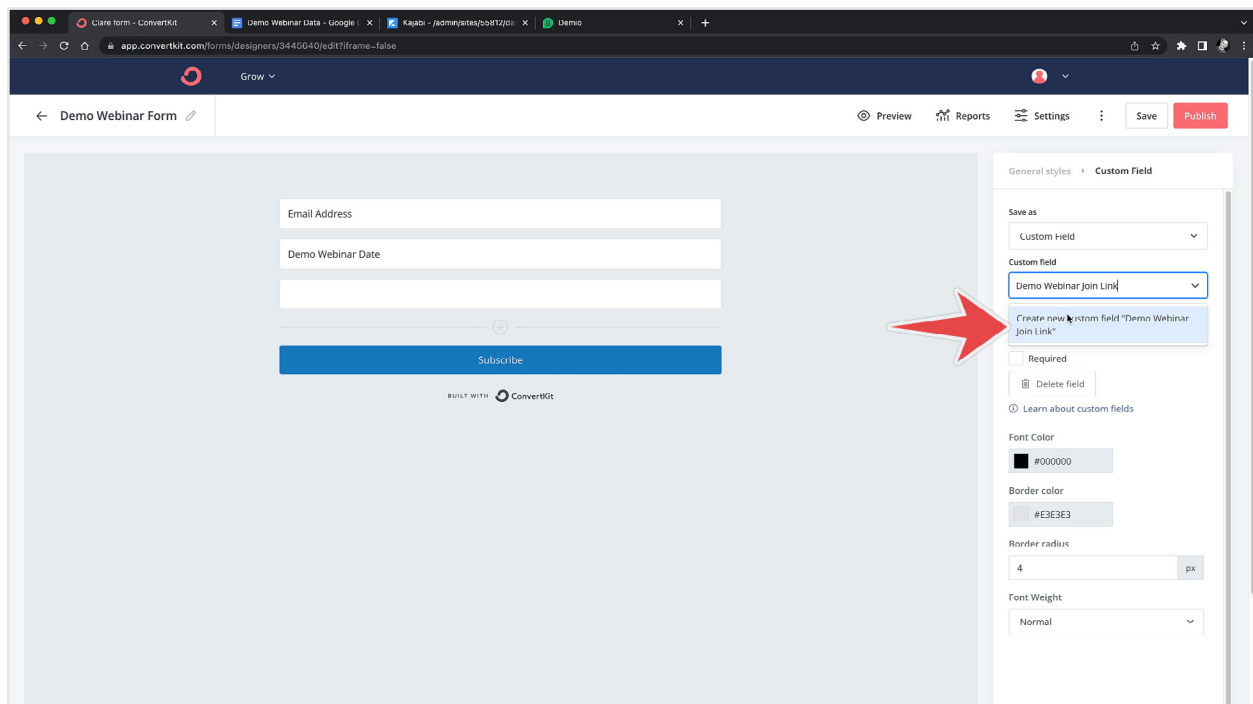
In the panel to the right, make sure it's set to **Custom Field**:



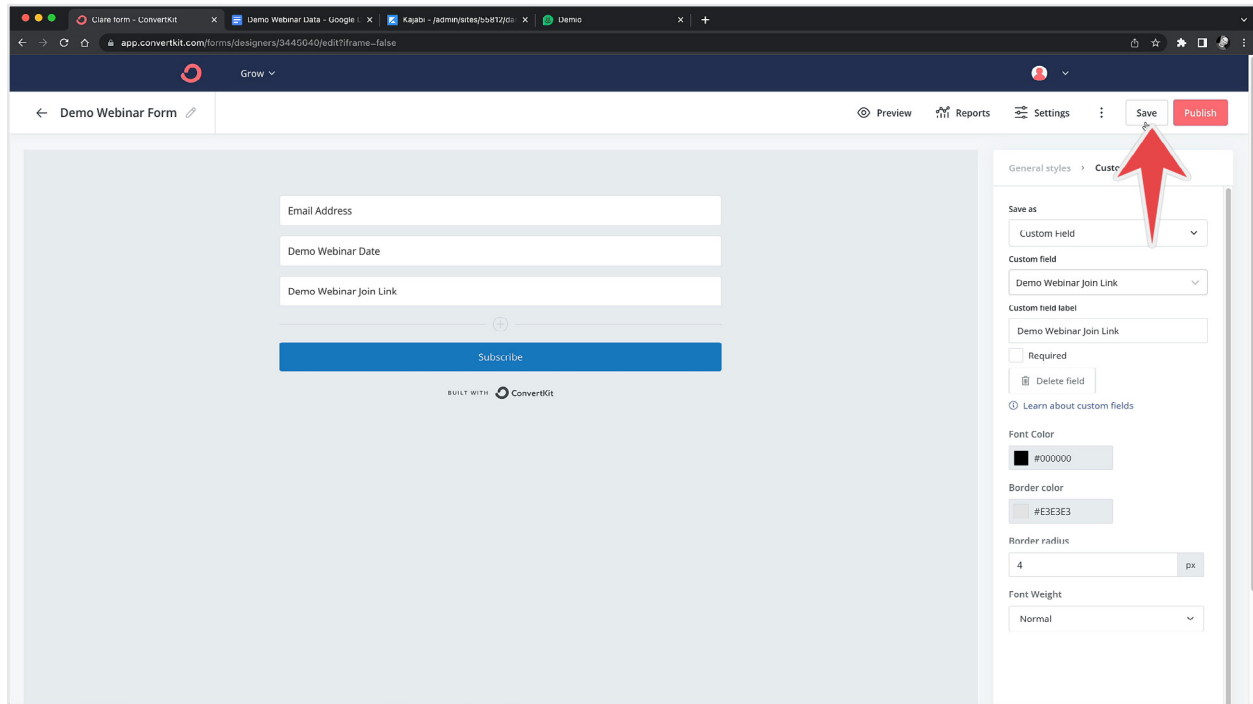
Go to the custom field dialogue, click and enter a custom field name. That makes sense to you. For example, I've entered Demo Webinar Join Link:



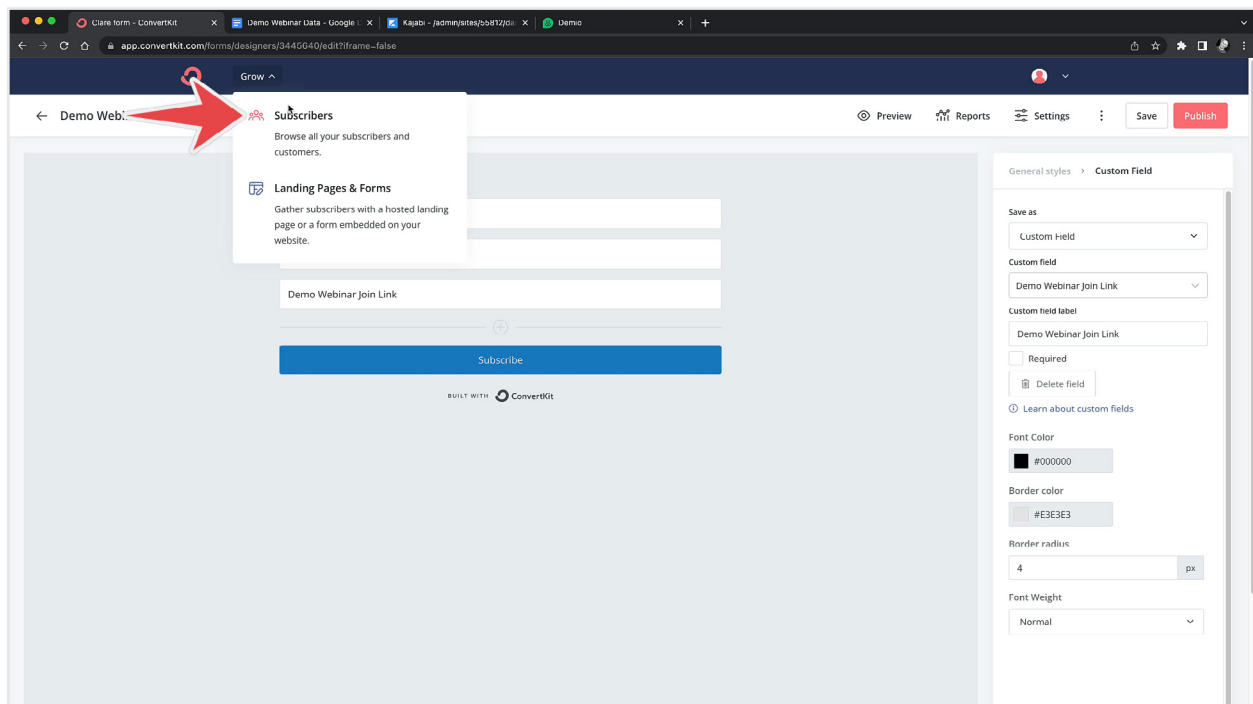
Then click on the blue box:



You're done adding your custom fields. Now go to the upper right hand corner and click on **Save**:



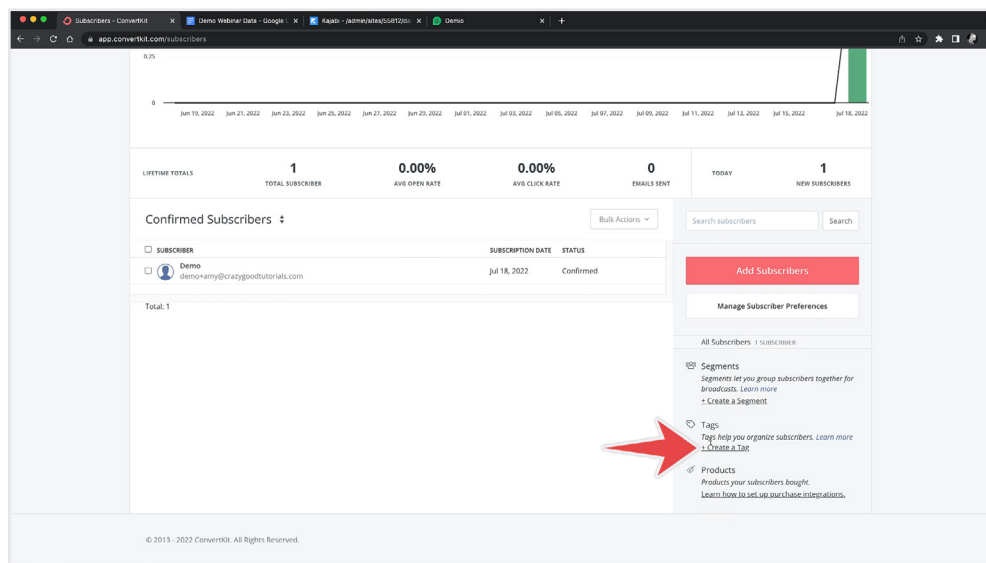
Next, from the menu at the top, click on **Grow** and then **Subscribers**:



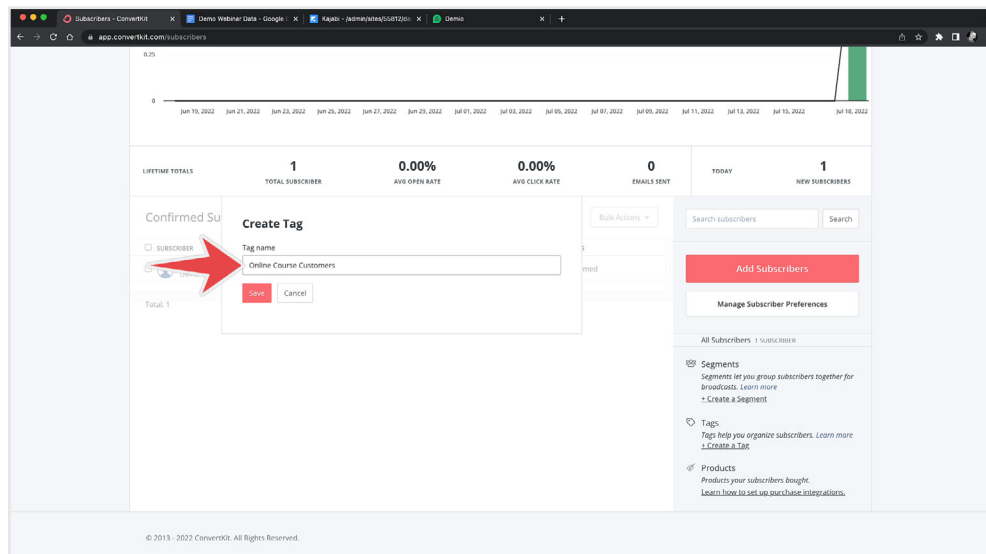
Scroll down towards the bottom of the page. What you need to do next is add segments and tags. For segments, you need a way to identify the people who register for your webinars. And you do that by putting them into buckets or segments. That way you know who registered for the first webinar, the second webinar and the third webinar.

Tags are used so you know who has purchased your course. That way you're not sending marketing emails to people who already have our course.

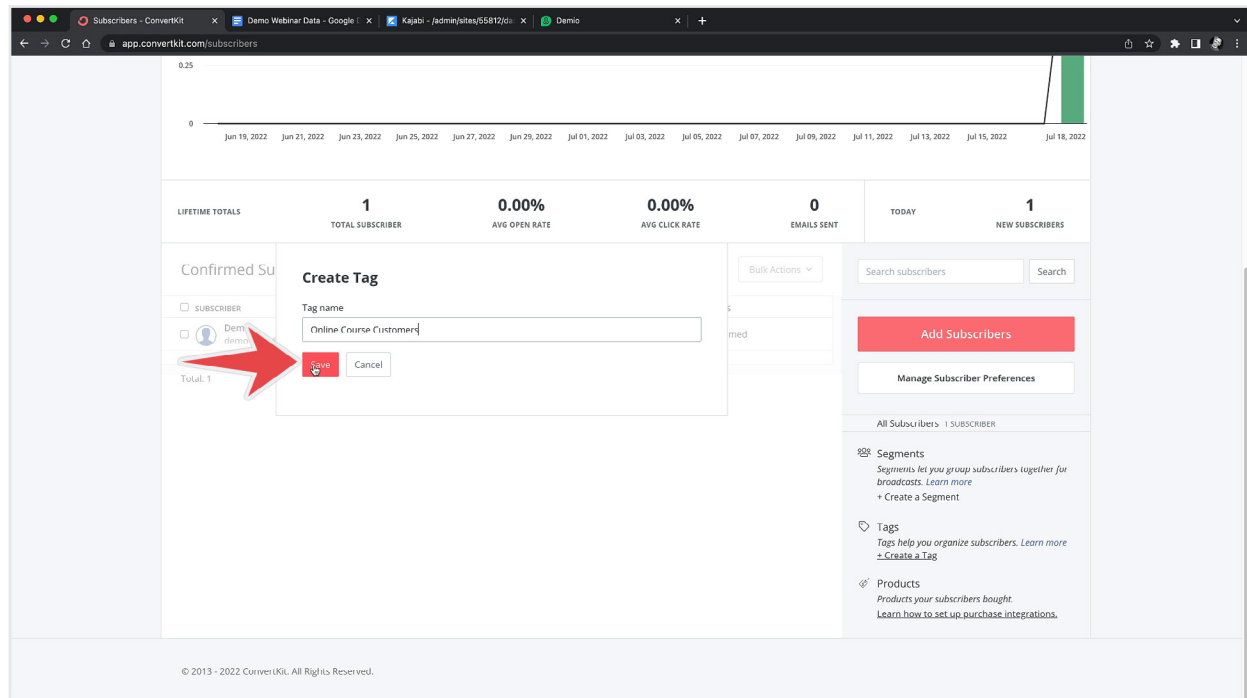
And we're going to start with tags. Go next to **Tags** and click **Create a Tag**:



The tag you're creating here is for people who have purchased your course. So enter a name that makes sense to you. In this example, I entered **Online Course Customers**:

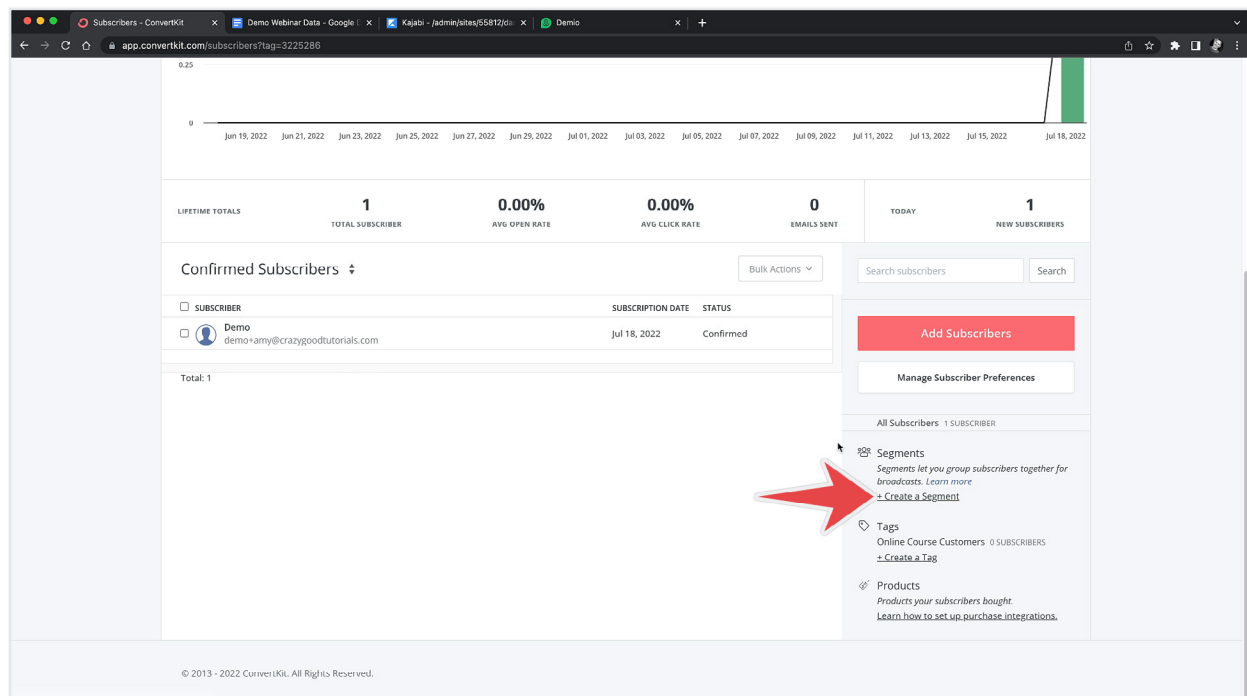


Then click on **Save**:

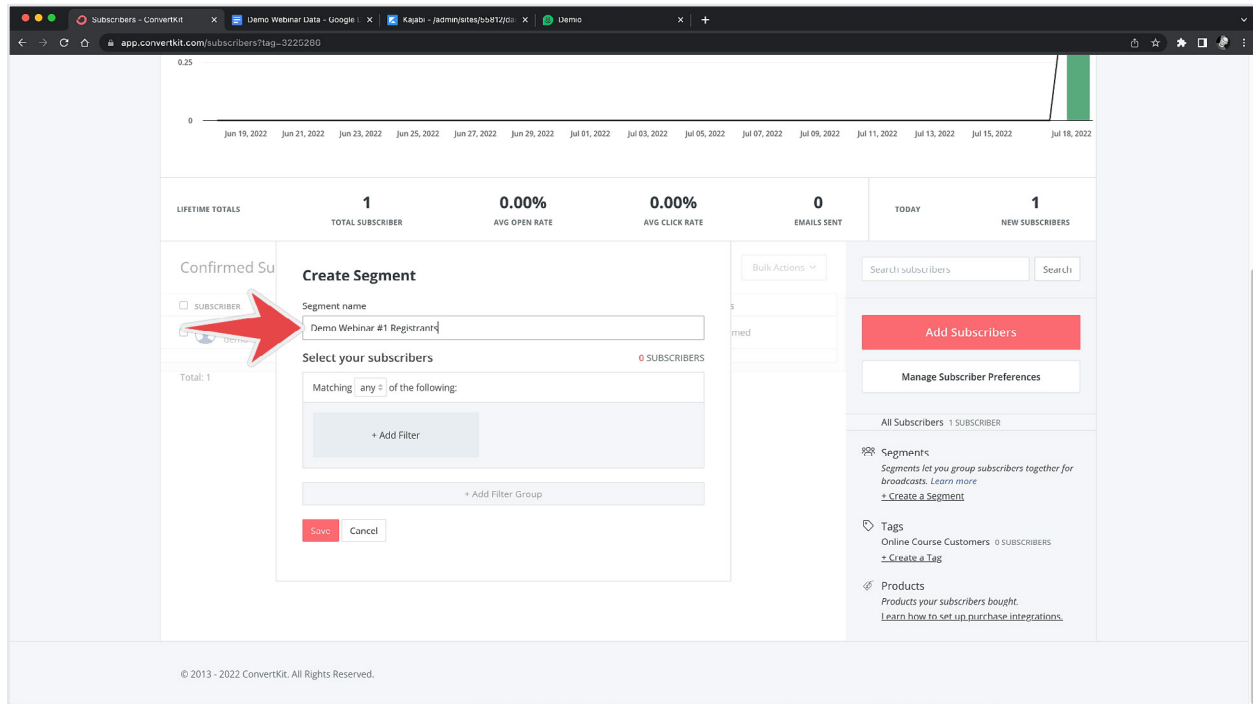


Now you're going to add segments, one for each of your three webinars and then a fourth segment that will be covered in just a bit. But first, you'll add your webinar segments.

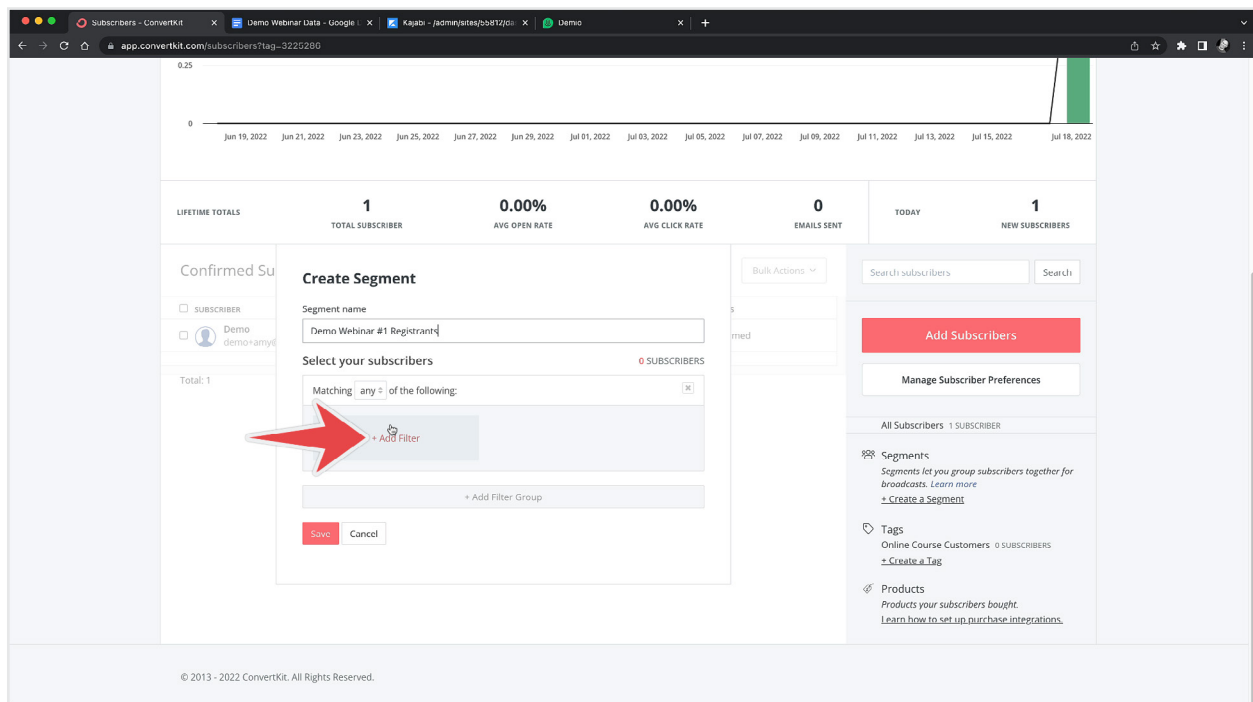
So go over to **Segments** and click on **Create a Segment**:



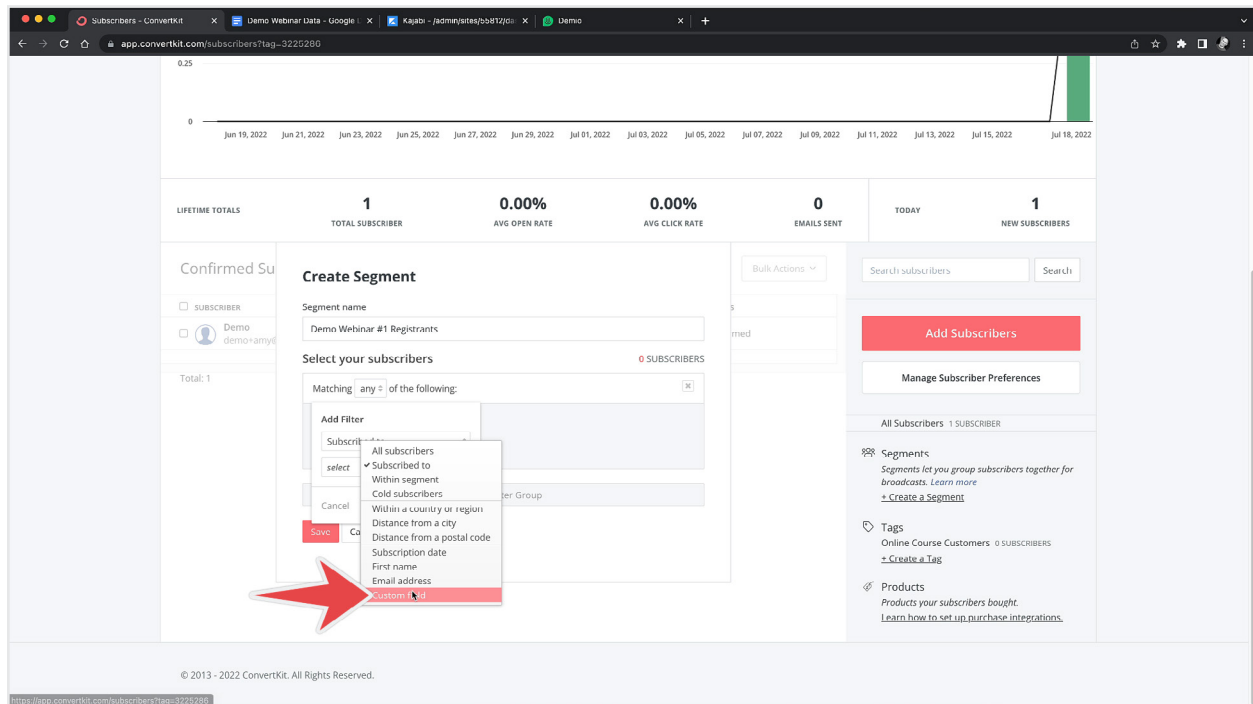
Give your segment a name that makes sense. In this example, the segment is for my first webinar so I've entered Demo Webinar #1 Registrants:



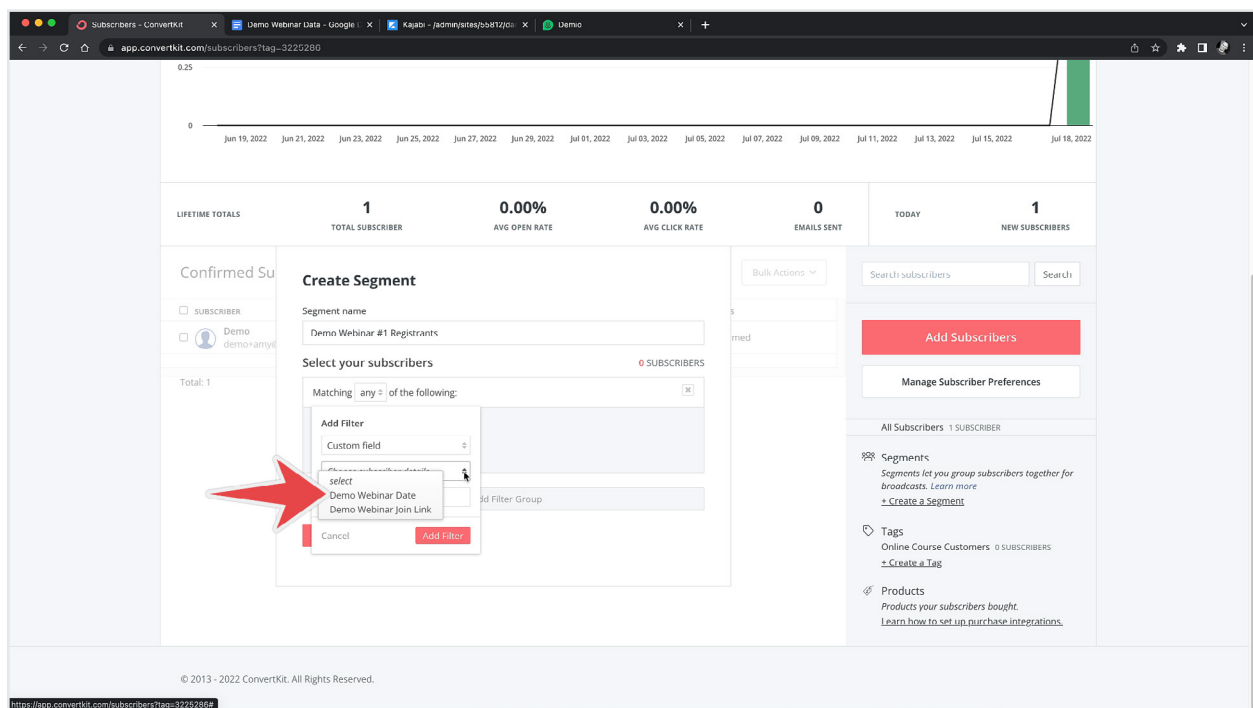
The click on the **Add Filter** dialogue:



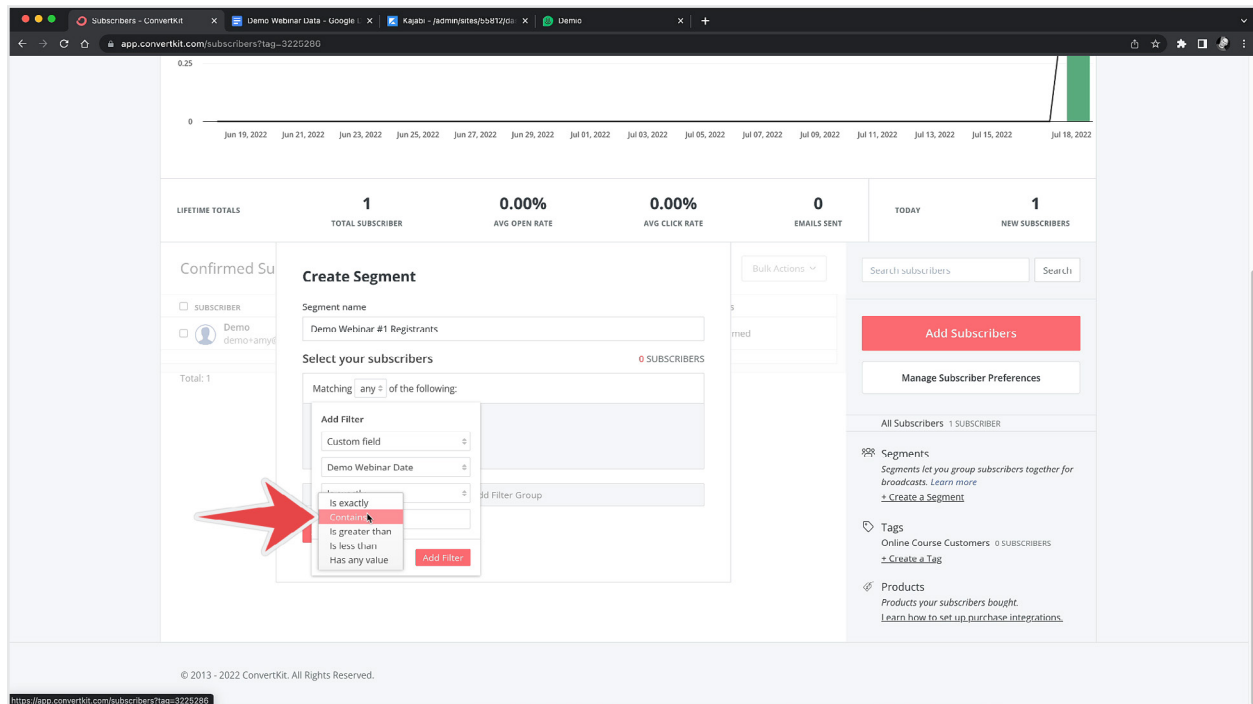
Go to the first dropdown, click and select **Custom Field**:



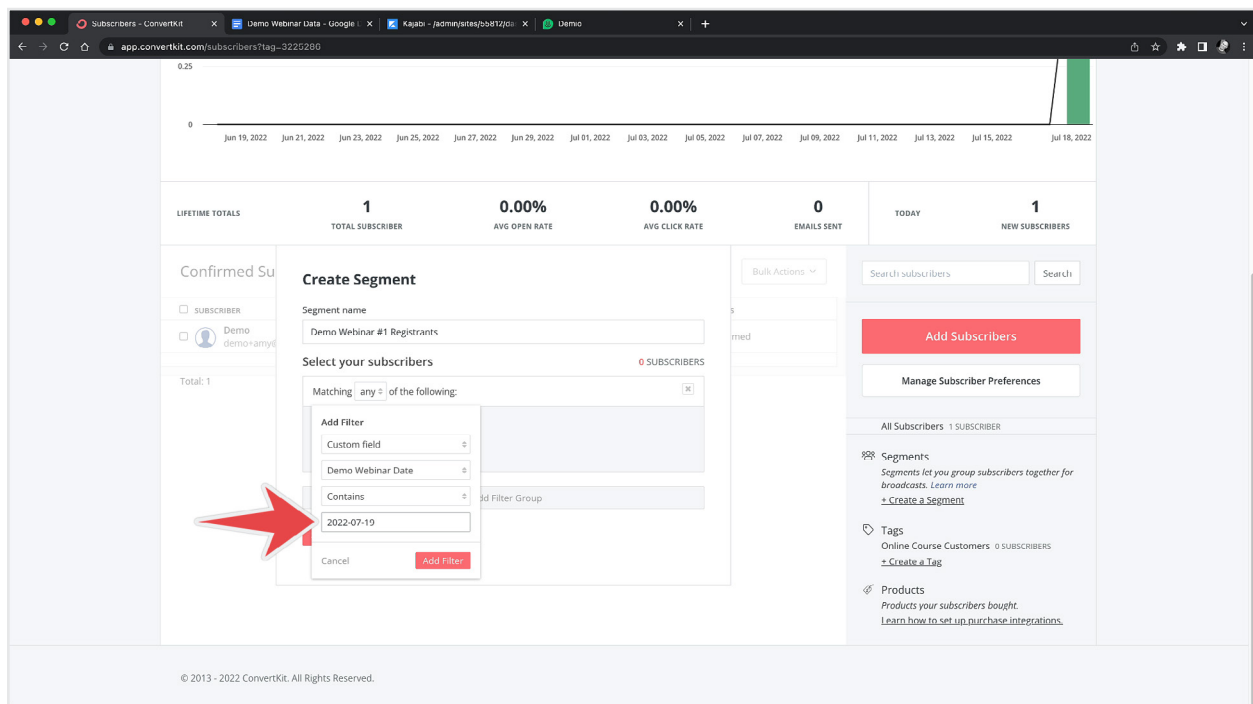
Go to the next dialogue and click on it. The custom field webinar date field that you added earlier:



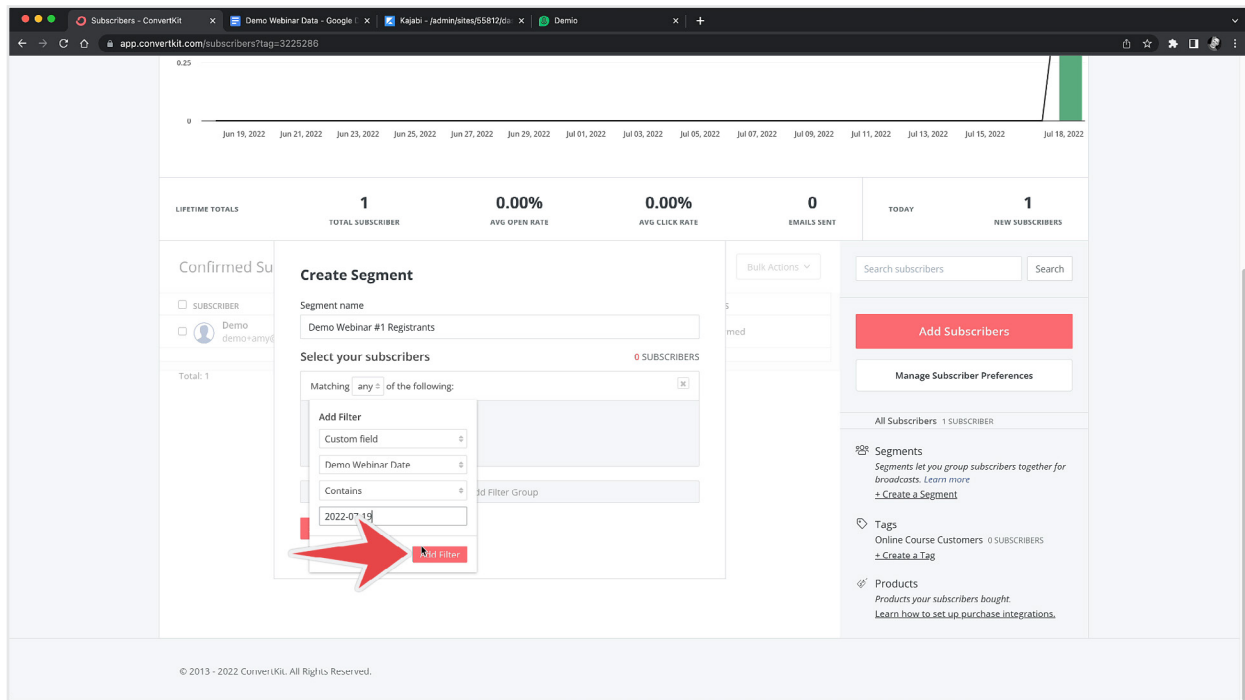
For the next dialogue, click and choose **Contains**:



And then for the value, you need to be specific with the date you enter. The format that you need to follow is going to be yyyy/mm/dd. In this example, my first webinar is on July 19, 2022, so I enter 2022-07-19:

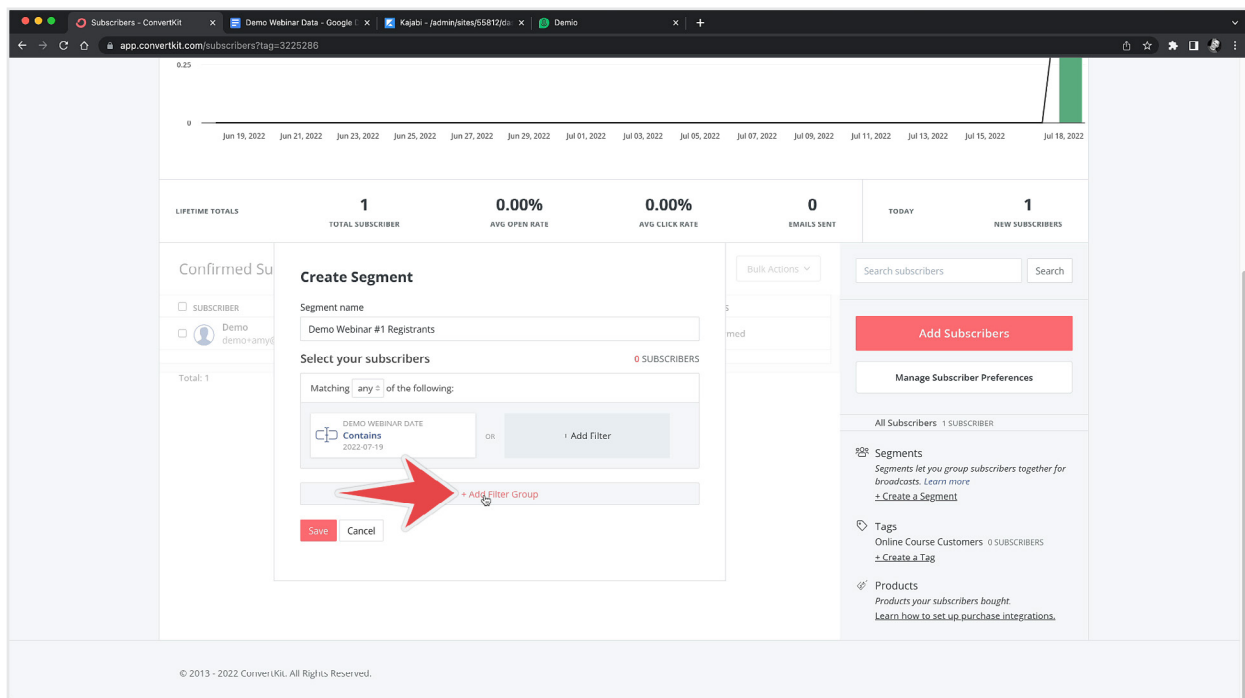


Then click on **Add Filter**:

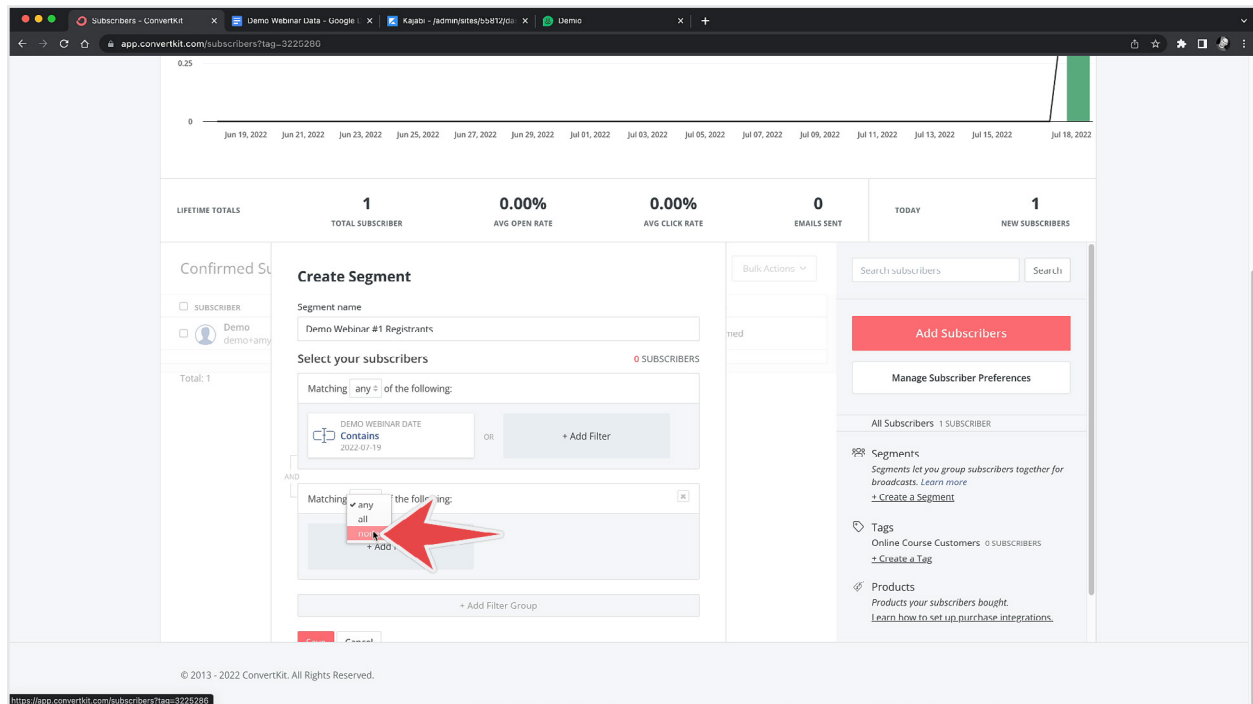


When you do this, everyone who registers for your first webinar based on that date, will be put into the segment. But you're not done yet. Remember, you also want to exclude anyone who has already purchased your course.

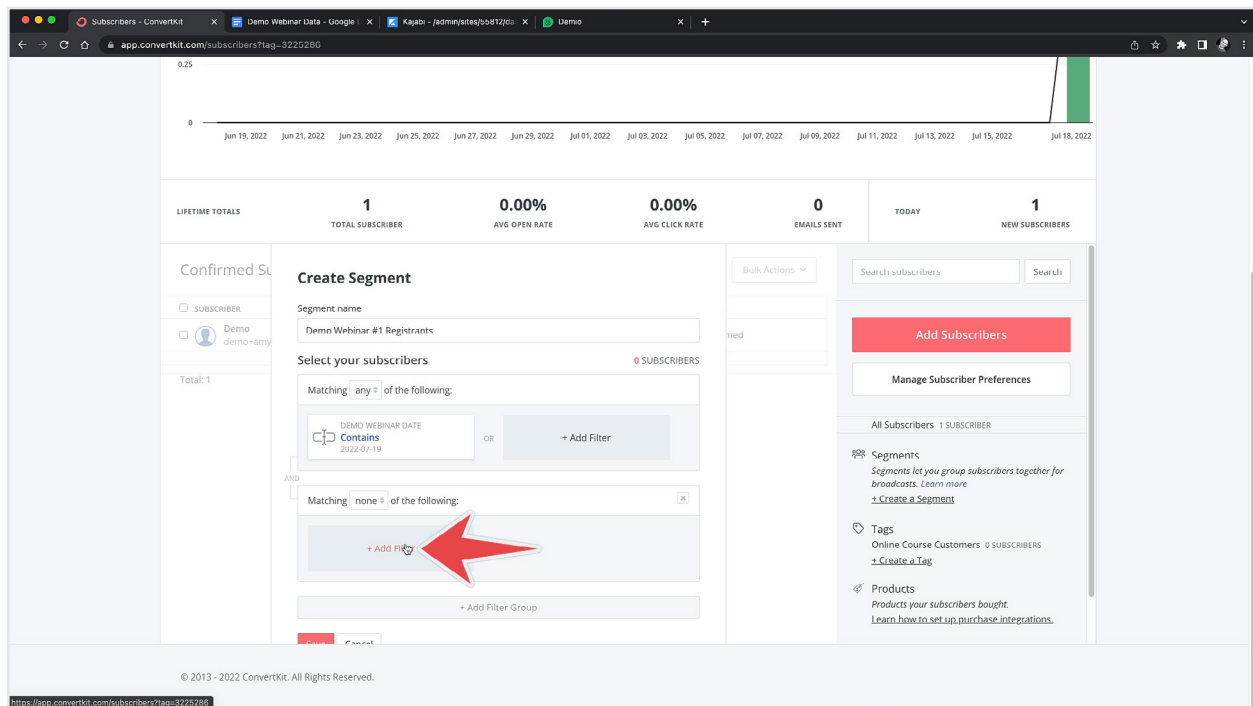
So you need to add an additional filter to do that. Click **Add Filter Group**:



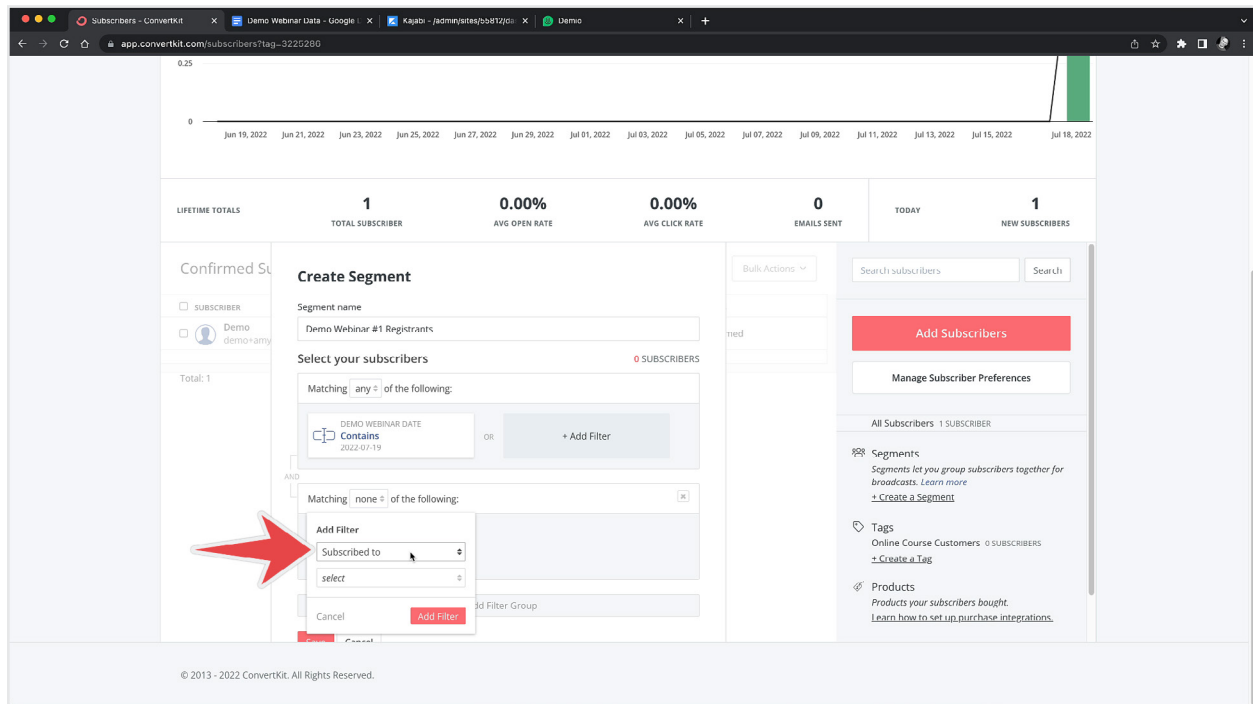
For the **Matching**, select **None**:



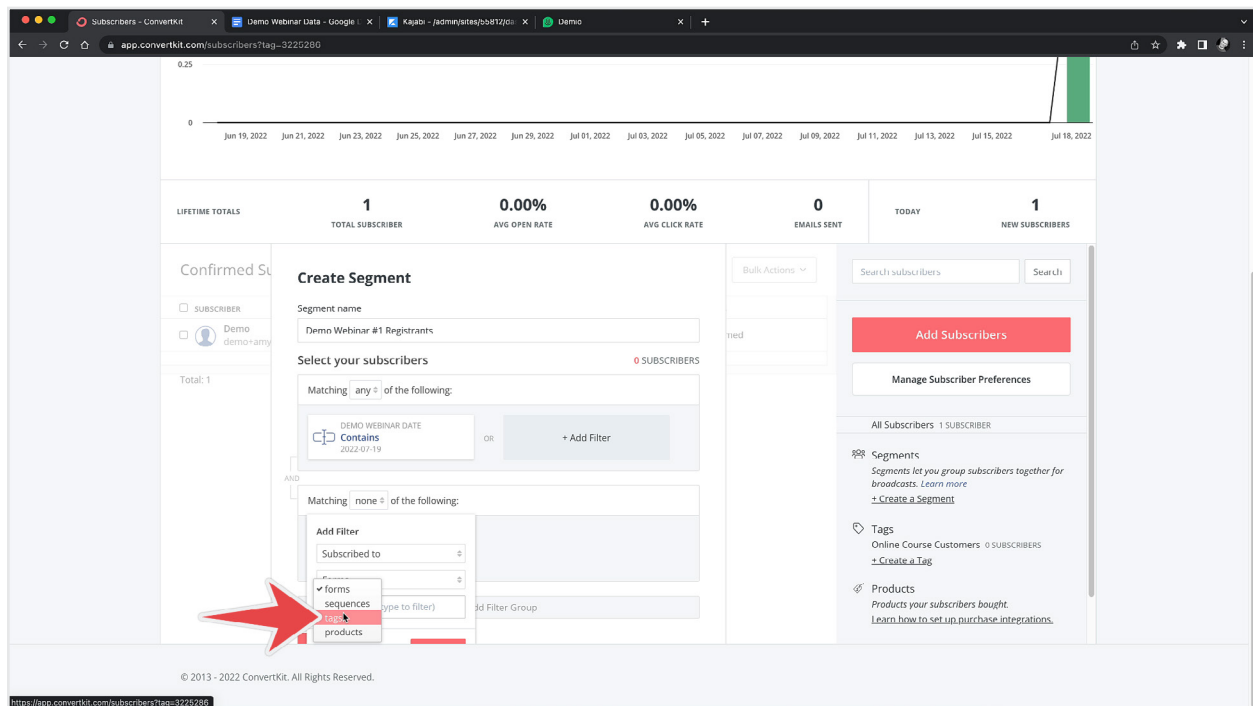
Then click on **Add Filter**:



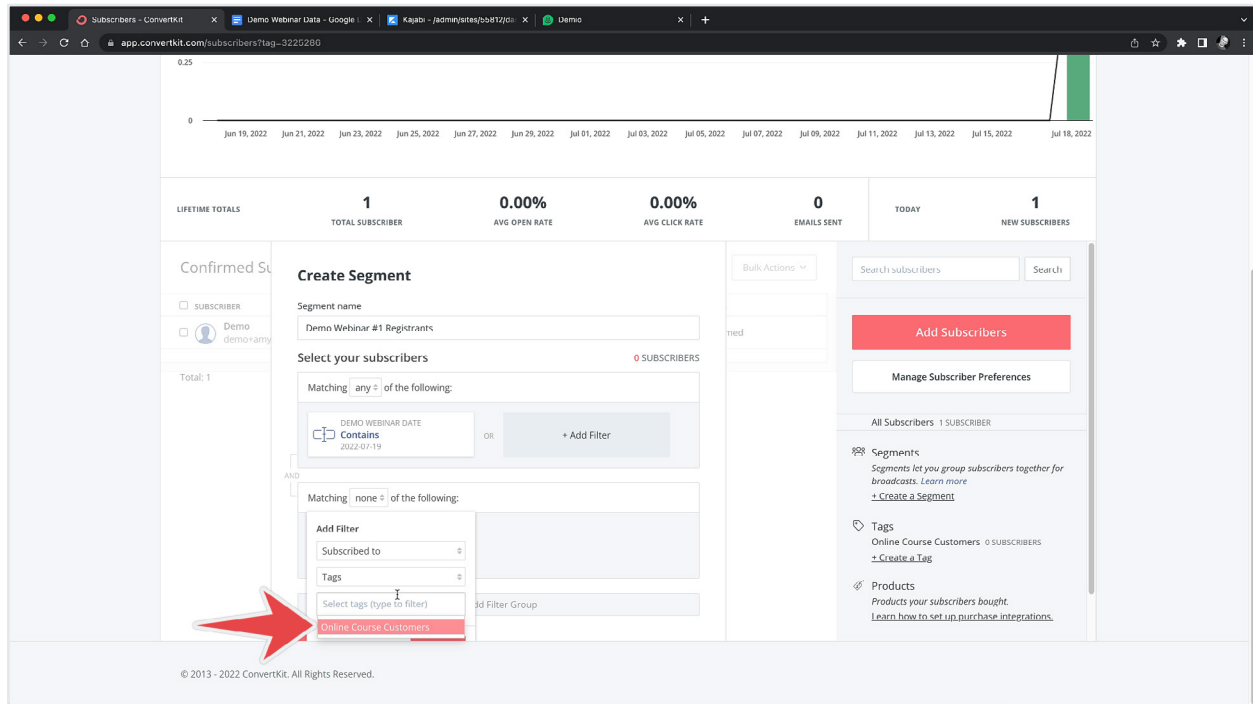
Leave the first dialog **Subscribe To:**



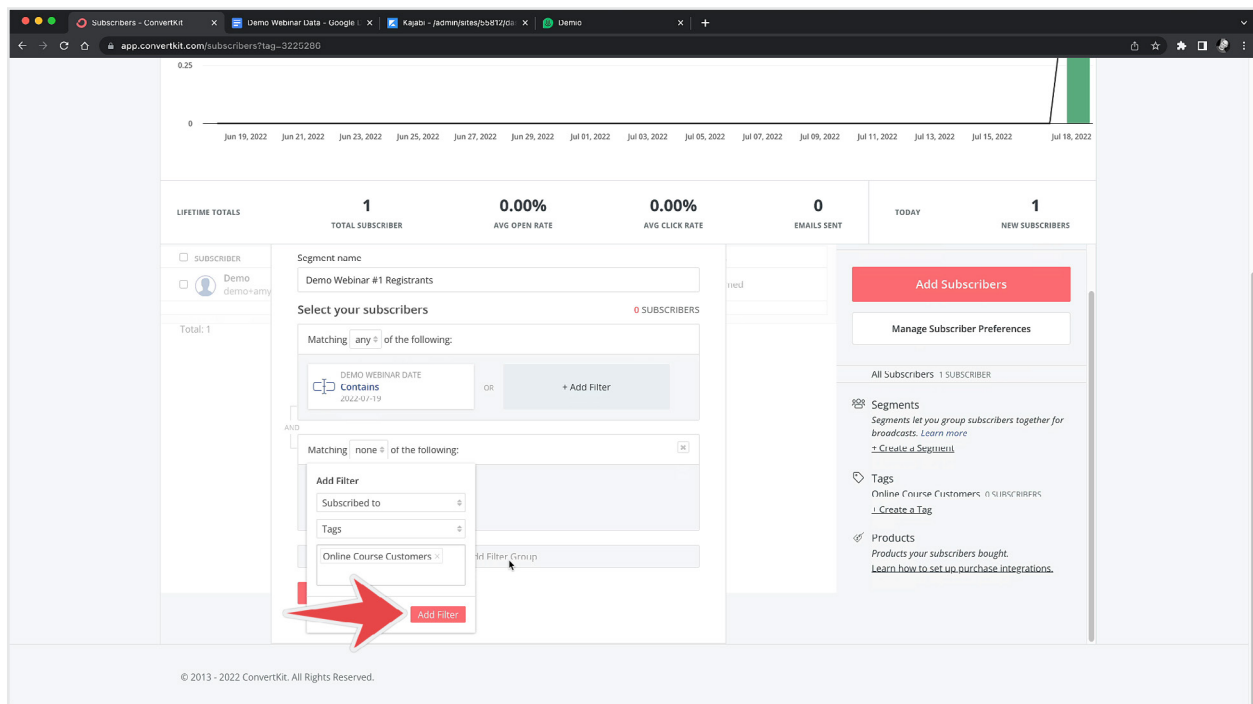
I'll go to the next dialogue, select **Tags:**



Then for the final dialogue, select that tag you created for your course customers:

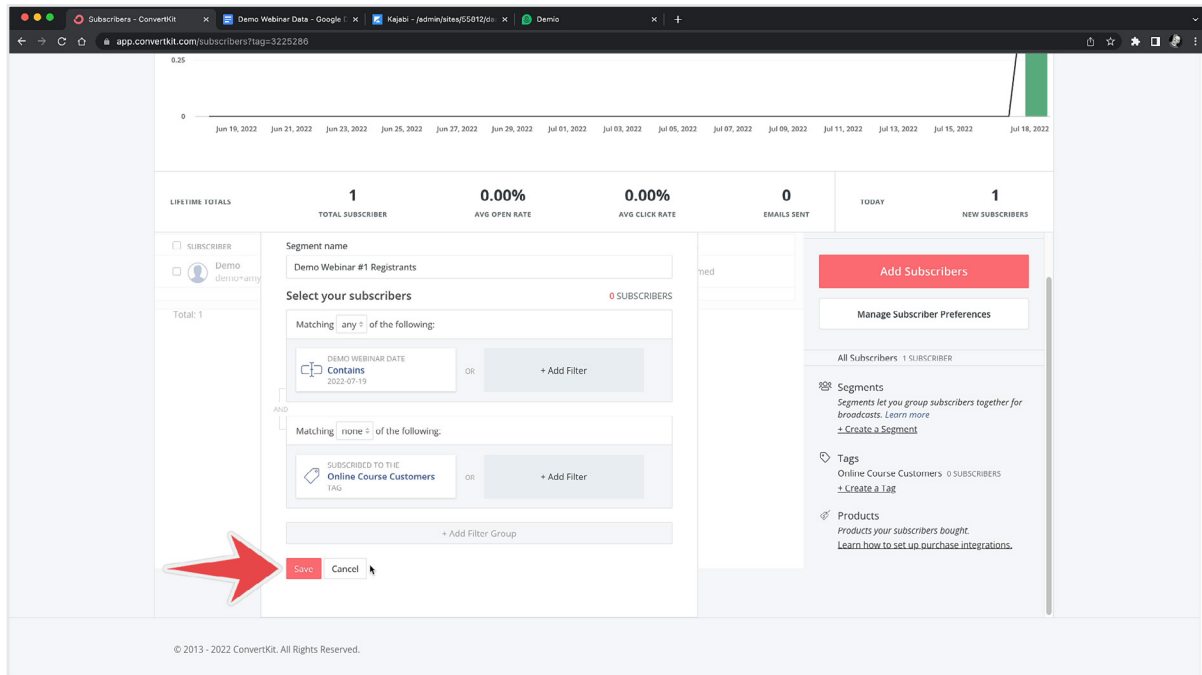


Scroll down a little bit and click on **Add Filter**:

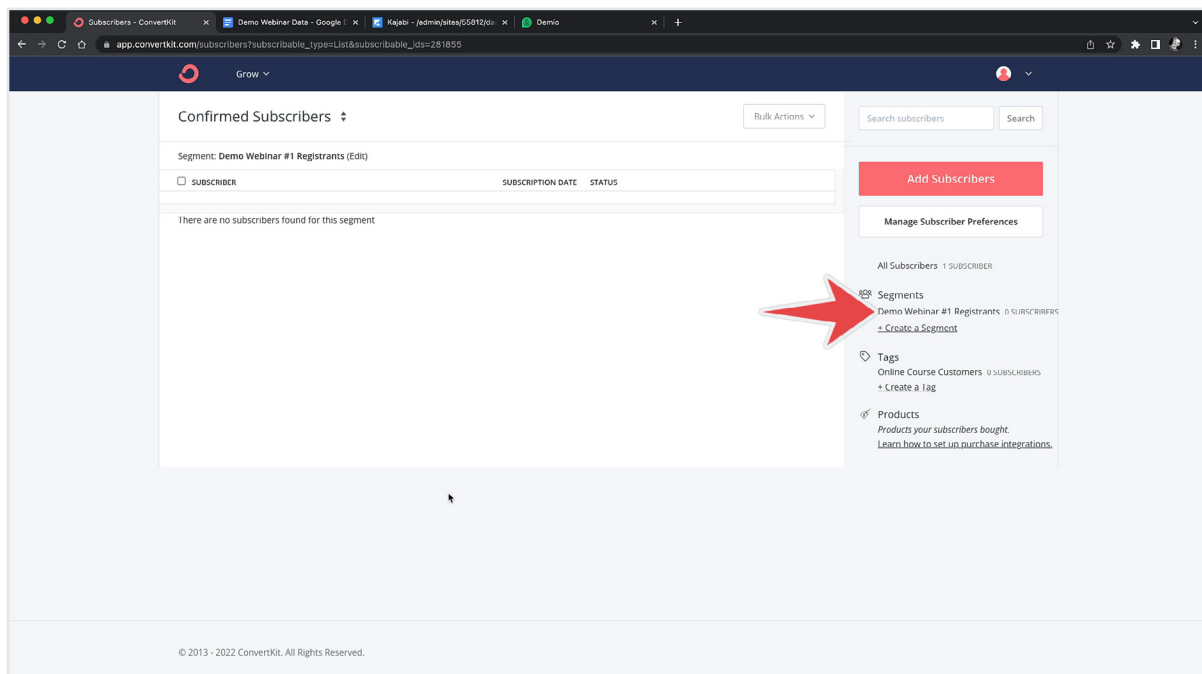


You've successfully set up your first segment. And again, with this segment, what you're doing is automatically storing everyone who registered for your first webinar, but has not purchased our course. And this will make it very simple to identify these people when you send emails in Step 3.

Finally, click on **Save**:



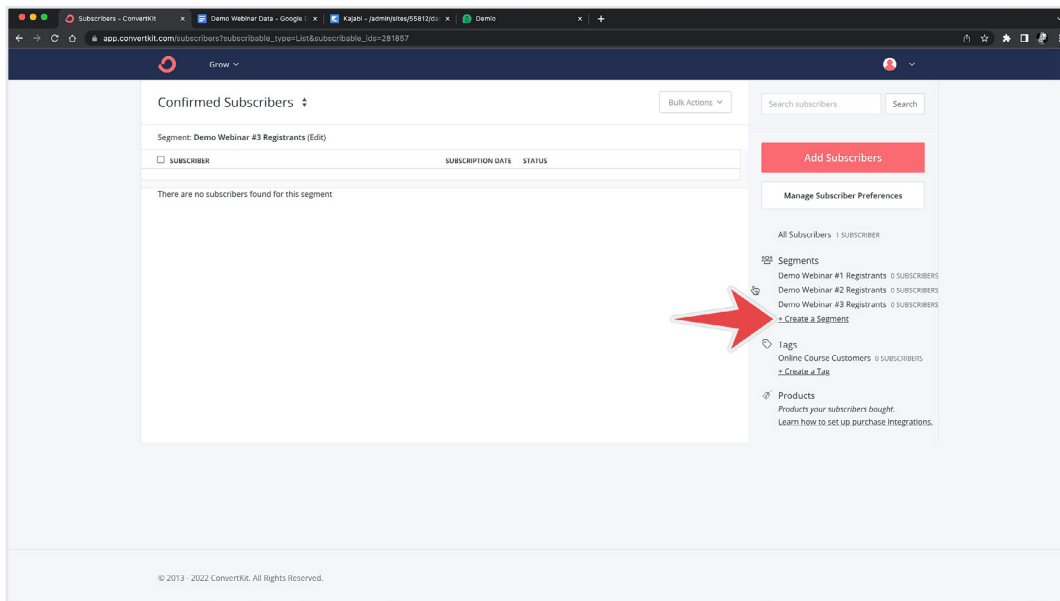
In the panel to the right, you'll see that this segment has been added:



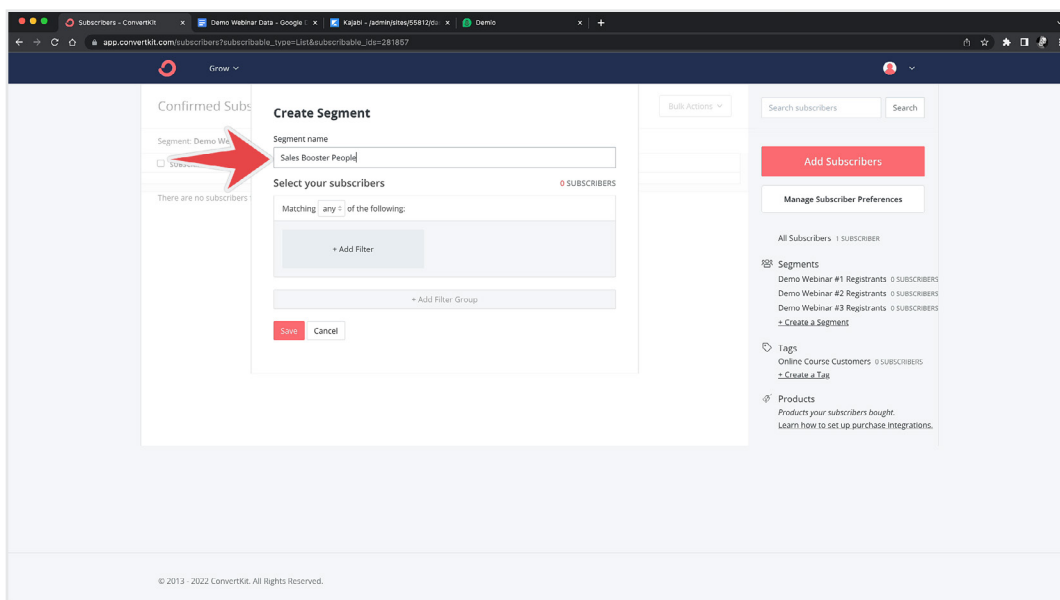
Now you will repeat the same exact process, but you'll create segments for your 2nd and 3rd webinar registrants.

Once that is done, you need to create a fourth segment that will be for your **sales booster** people. This will be all of the people where we told them about your webinar, but they never actually registered for a webinar and they haven't purchased your online course.

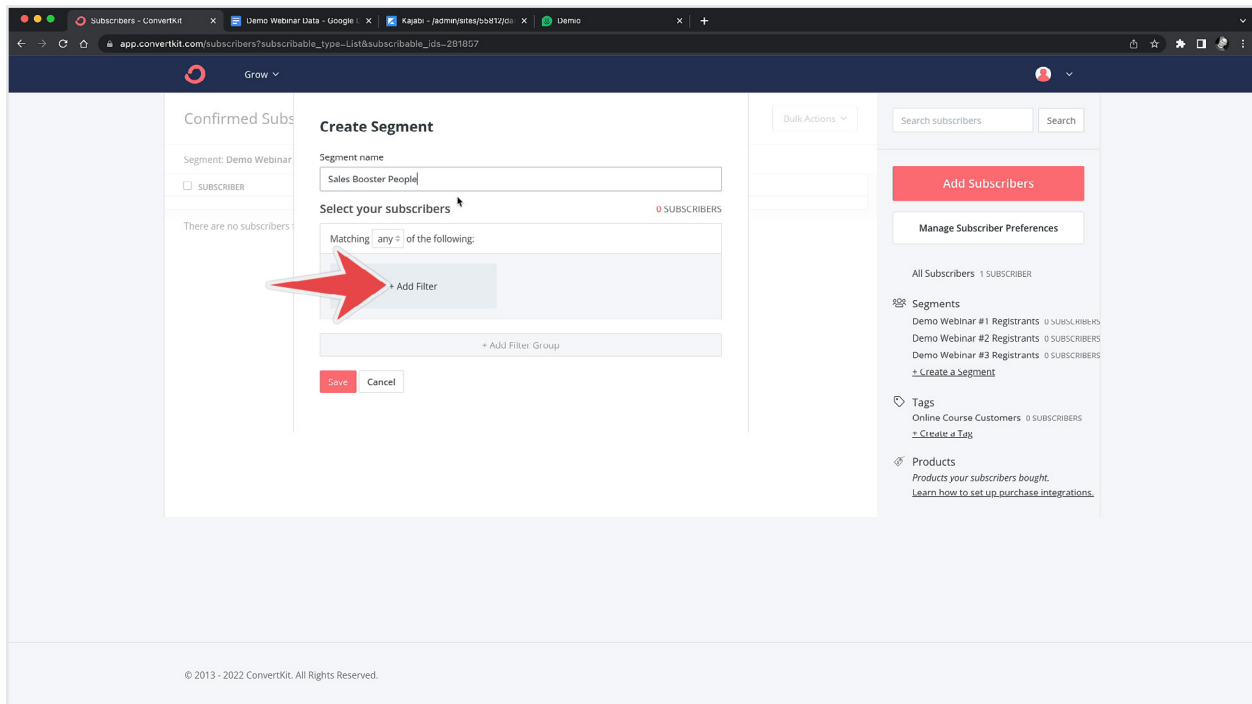
To do this, click on **Create a Segment**:



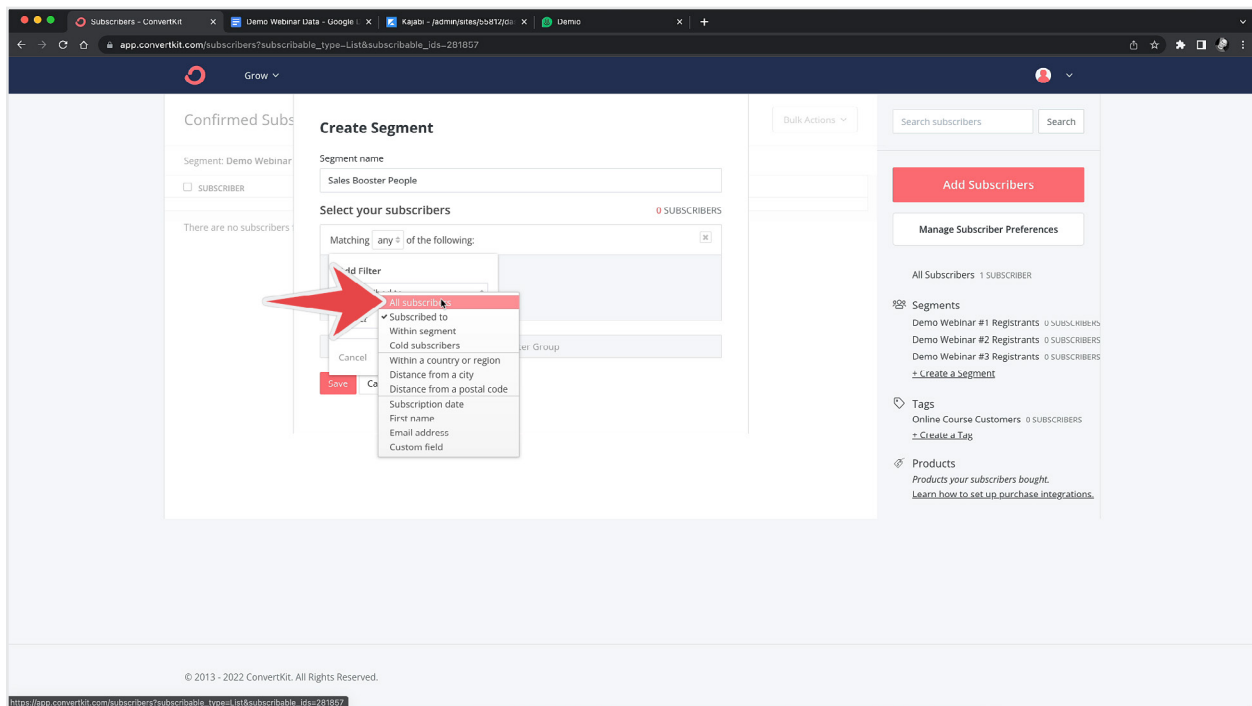
Give it a name that makes sense. For instance, I named mine, Sales Booster People:



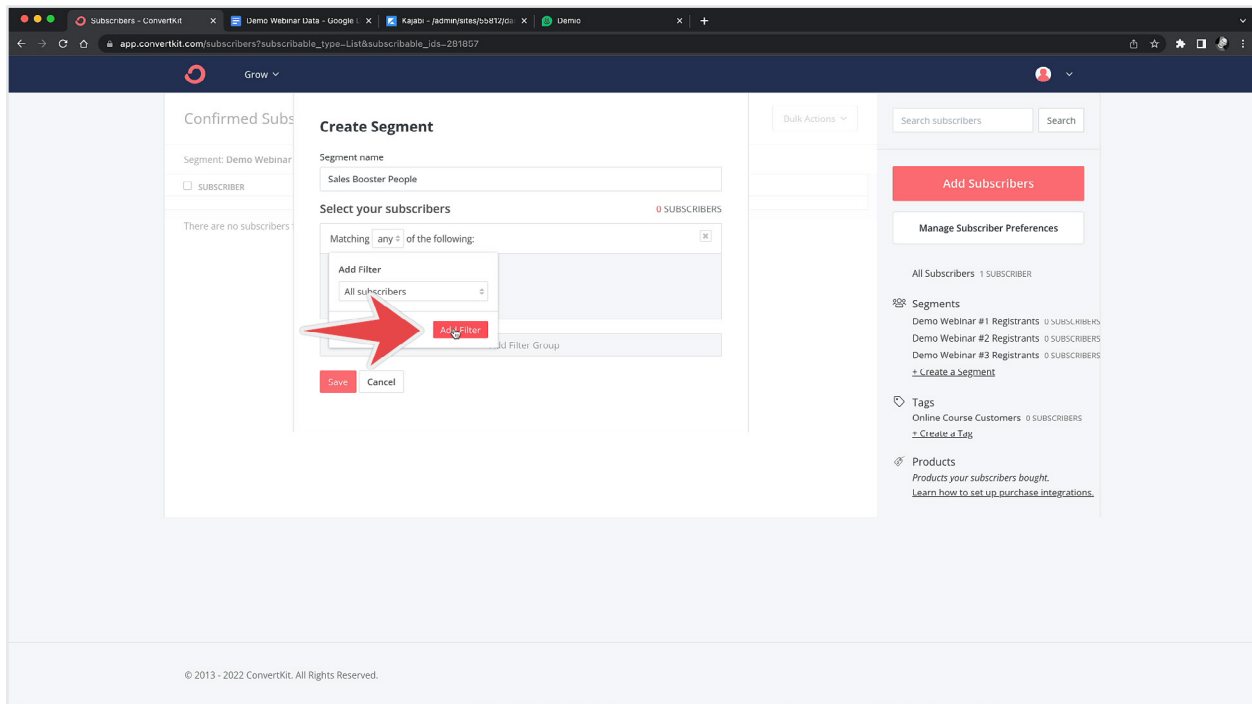
Then click on **Add Filter**:



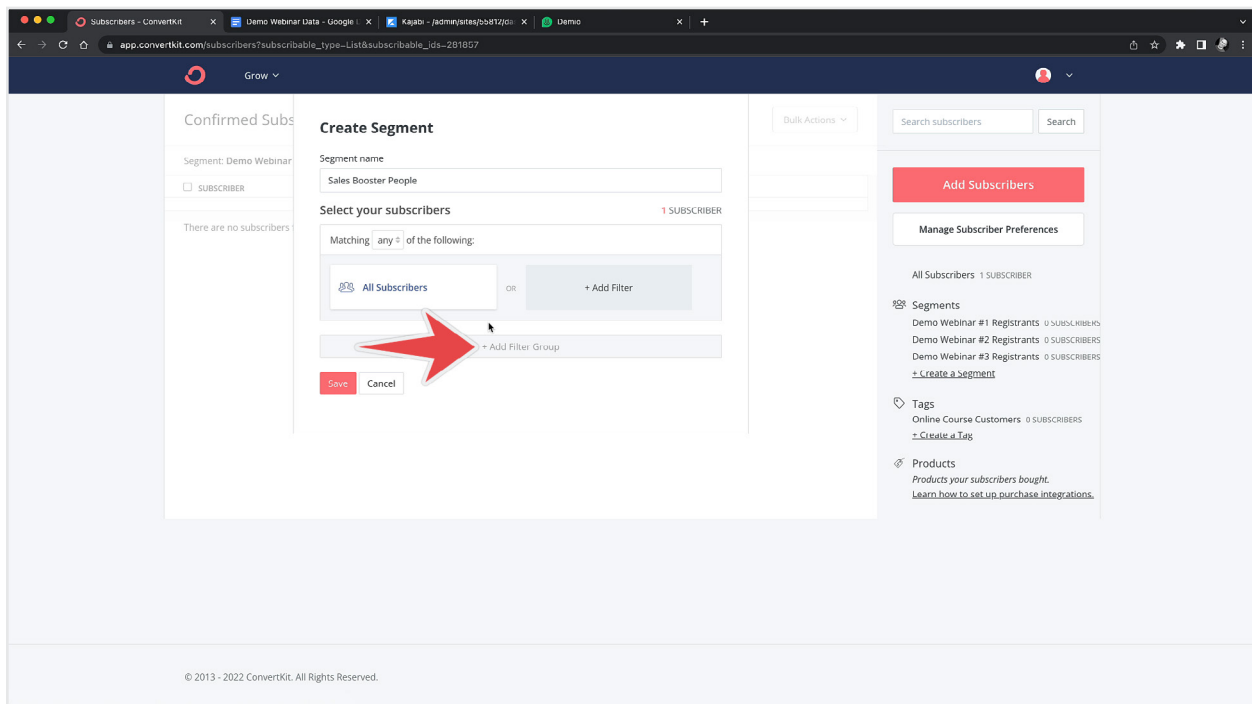
For the first dialogue, click on it and choose **All Subscribers**:



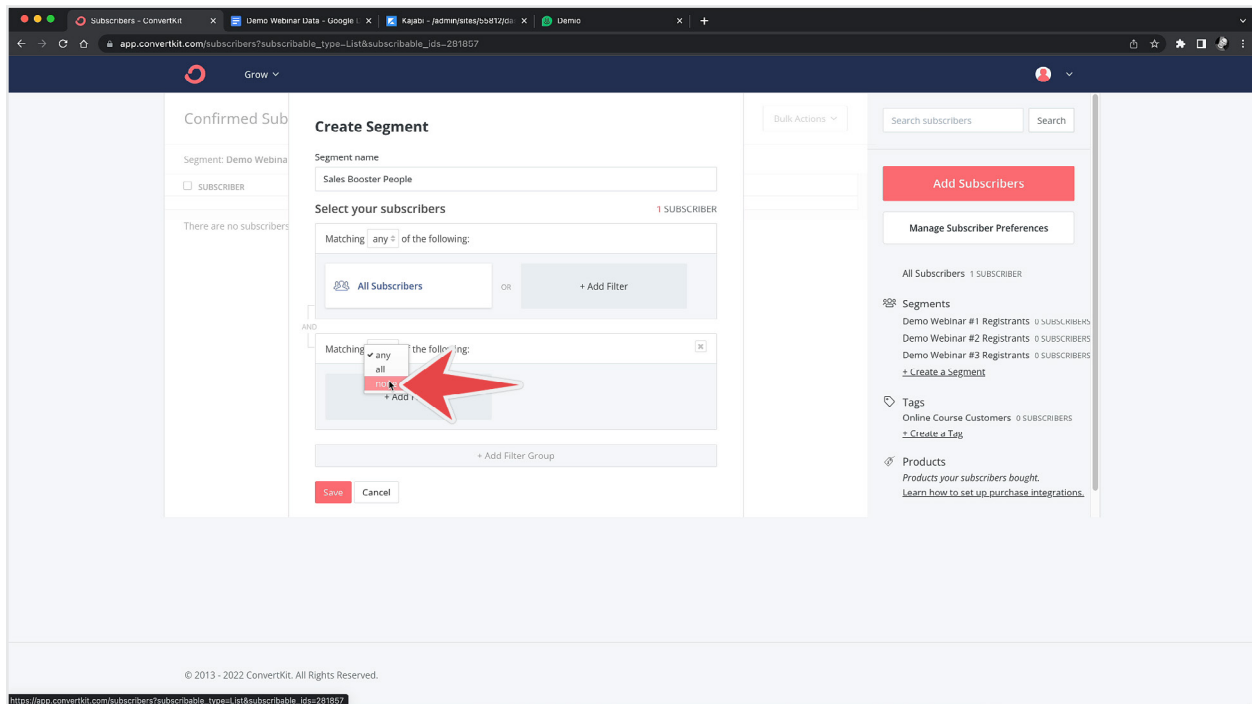
Then click on **Add Filter**:



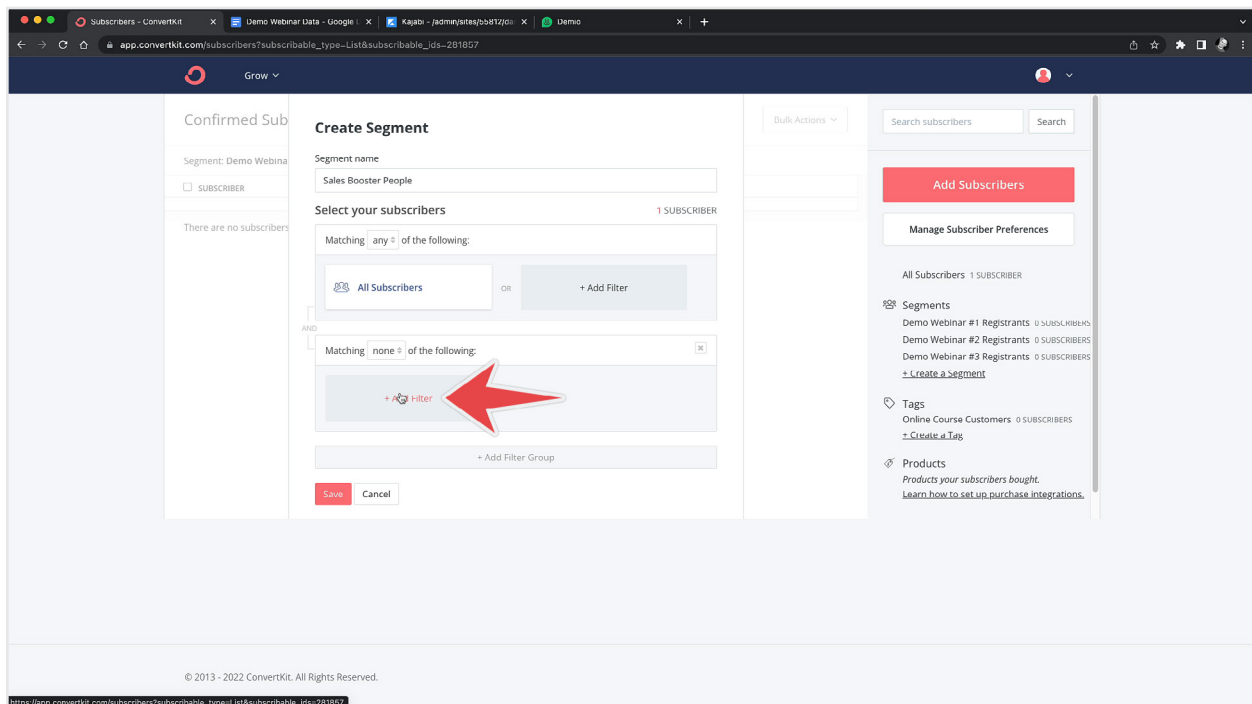
Click on **Add Filter Group**:



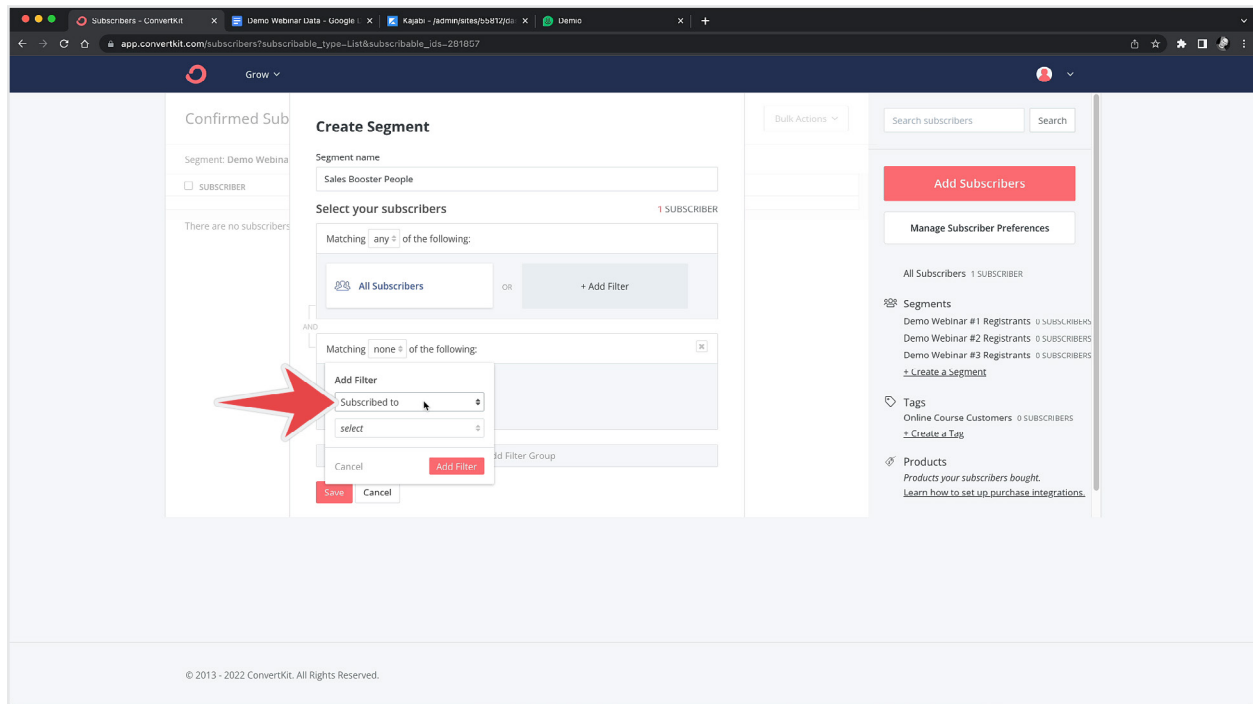
For **Matching**, select **None**:



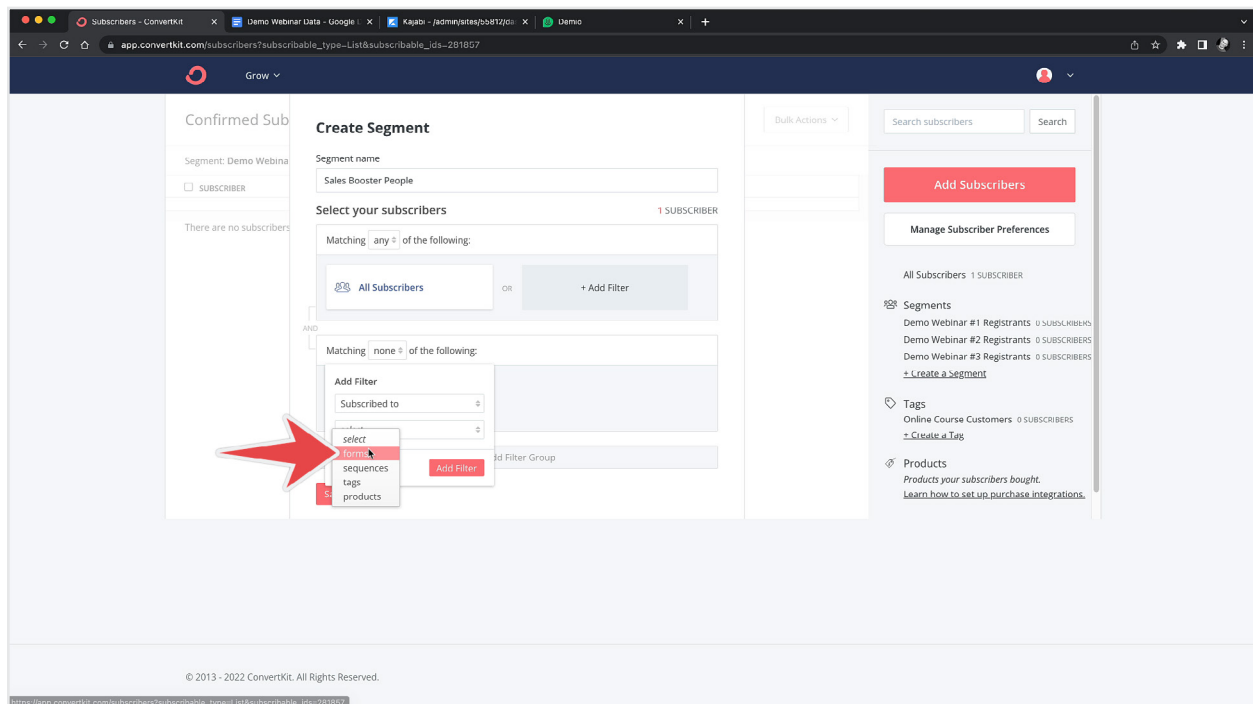
Click on **Ad Filter**:



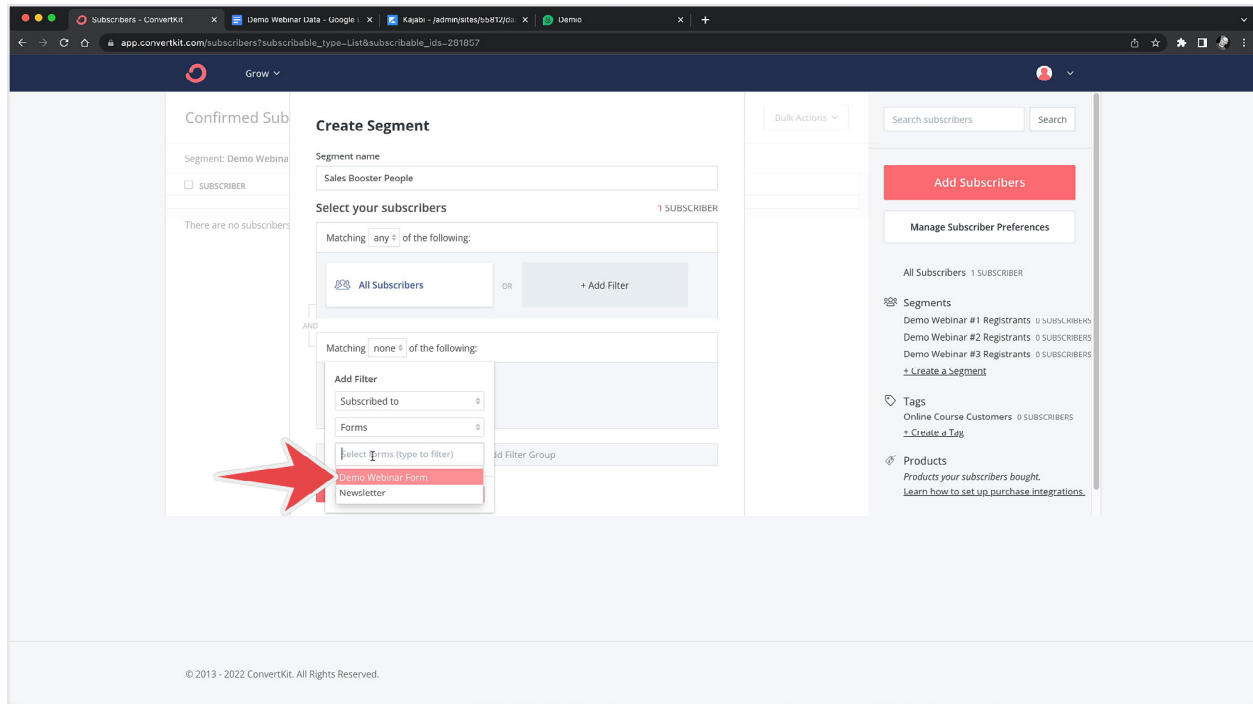
Leave the first dialog at **Subscribe To:**



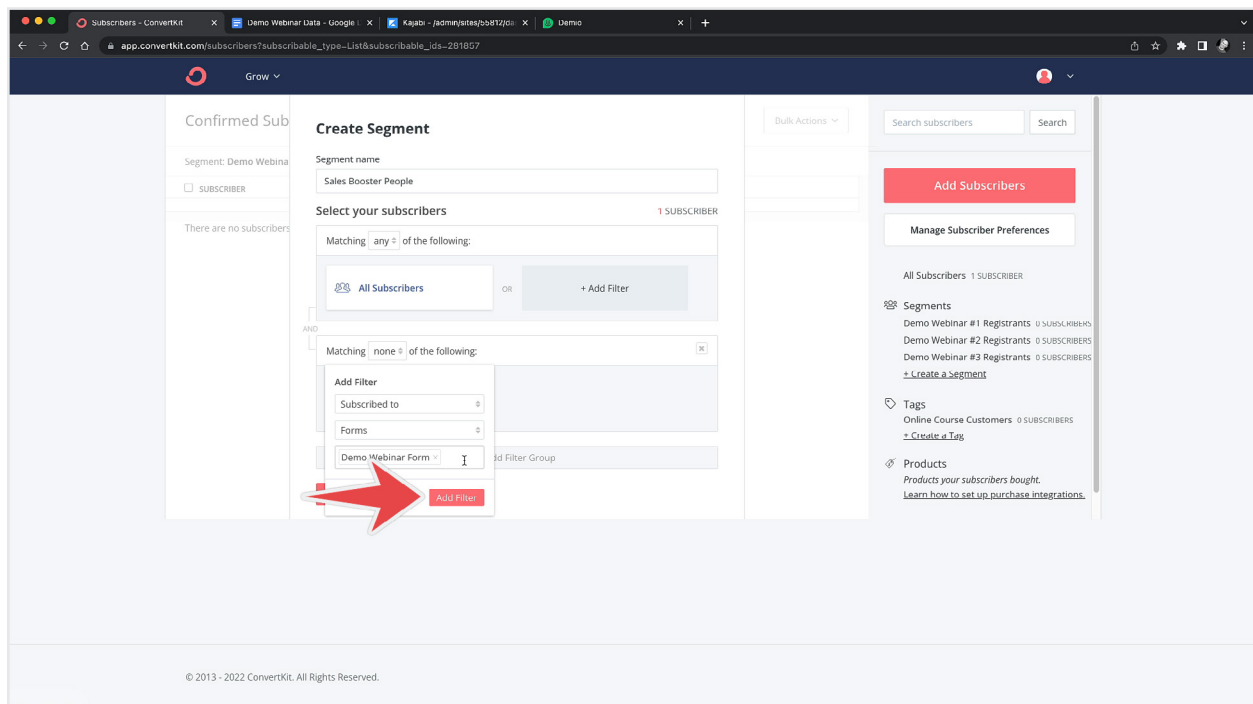
In the next dialogue, select **Forms**:



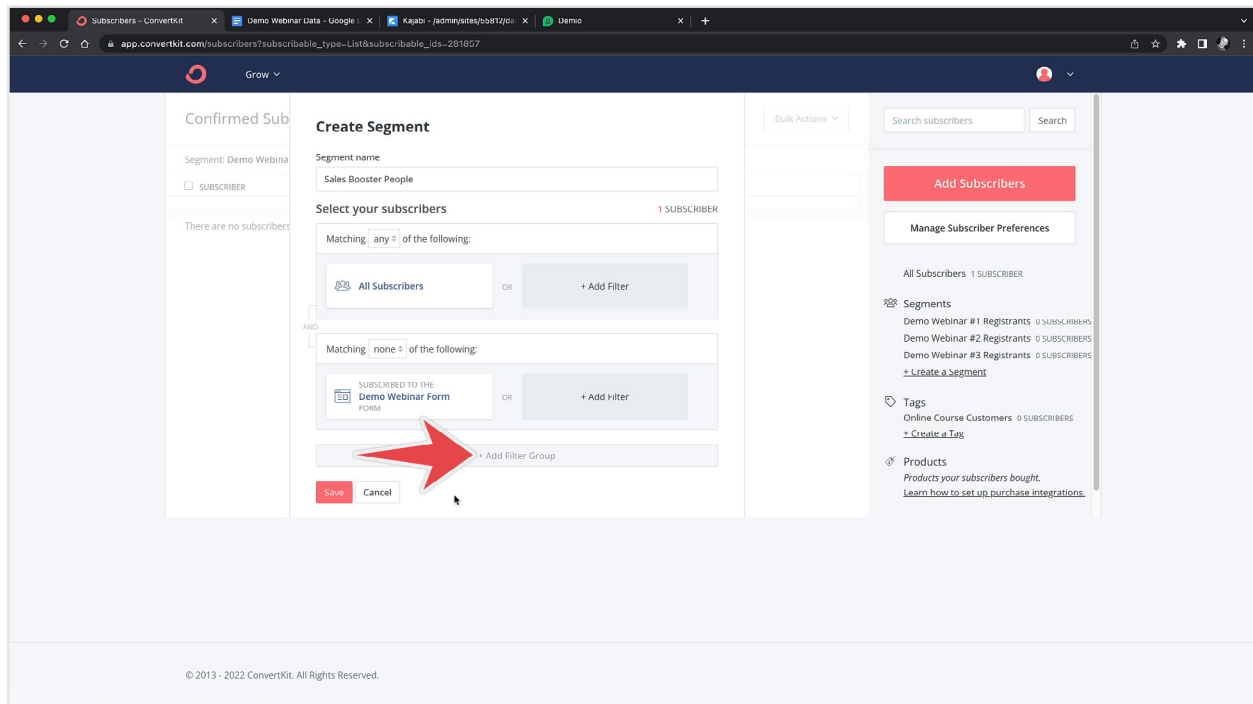
Select that form that you created earlier. For instance, mine is Demo Webinar Form:



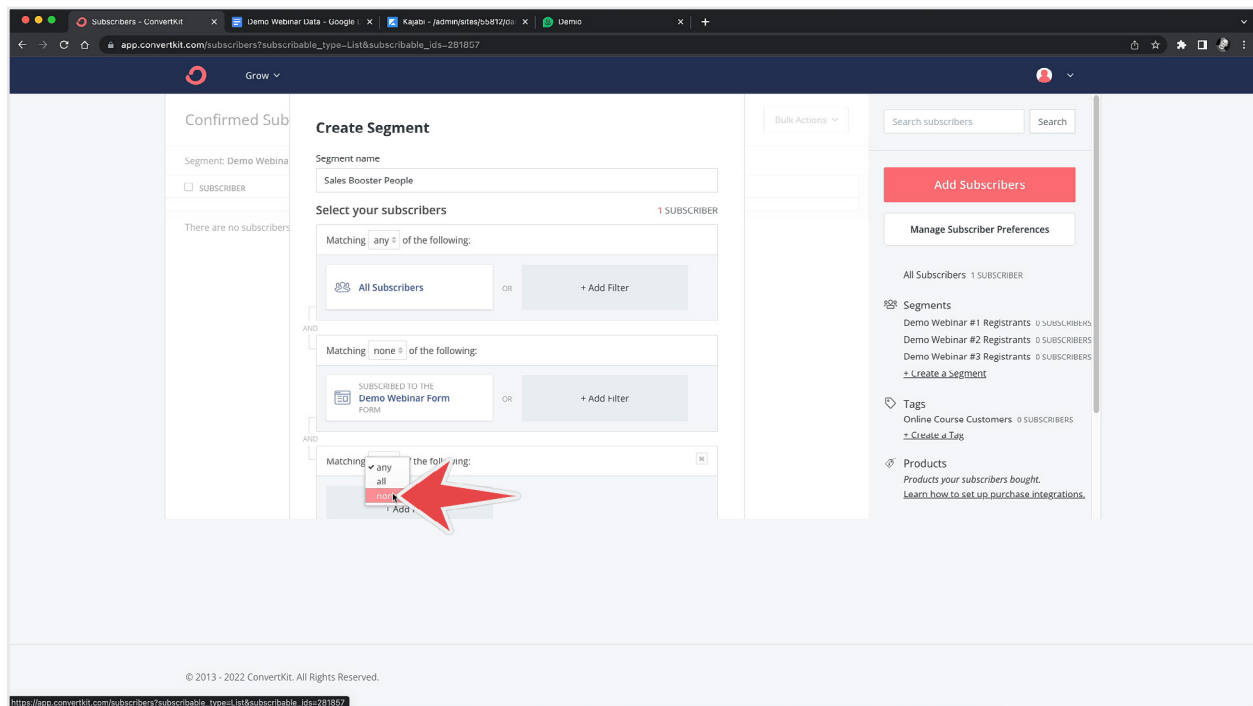
Then click on **Add Filter**:



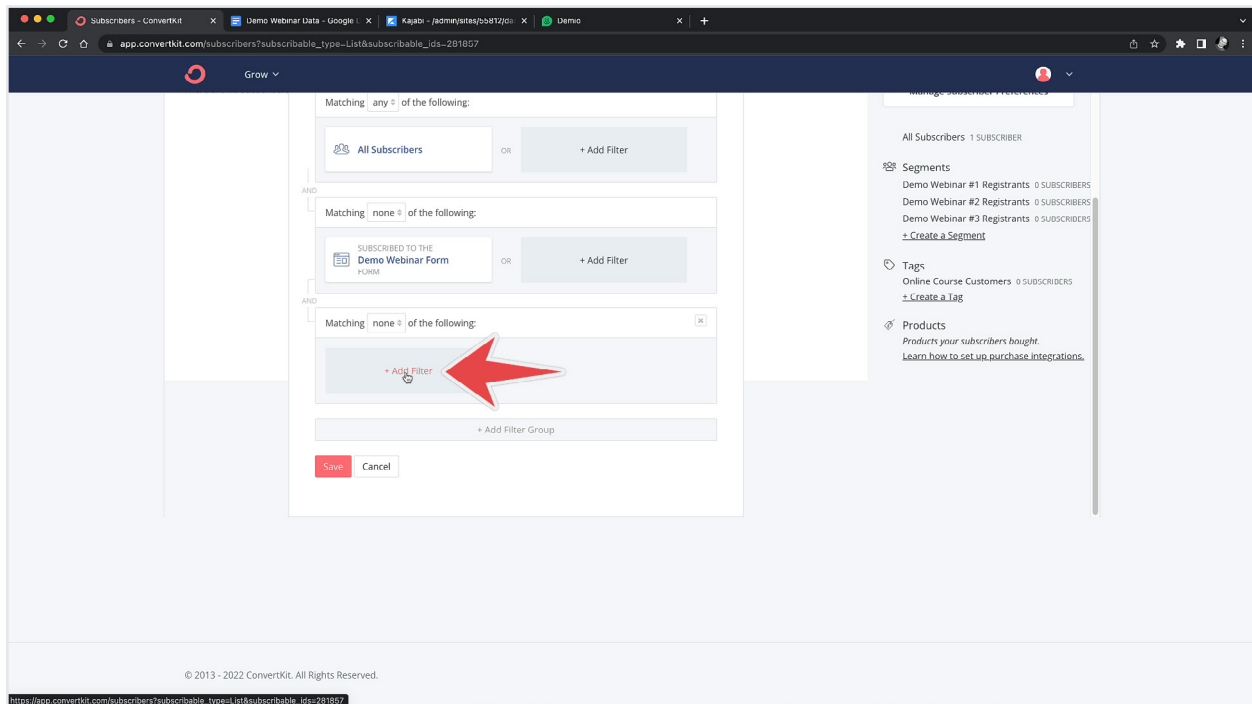
Then click on **Add Filter Group**:



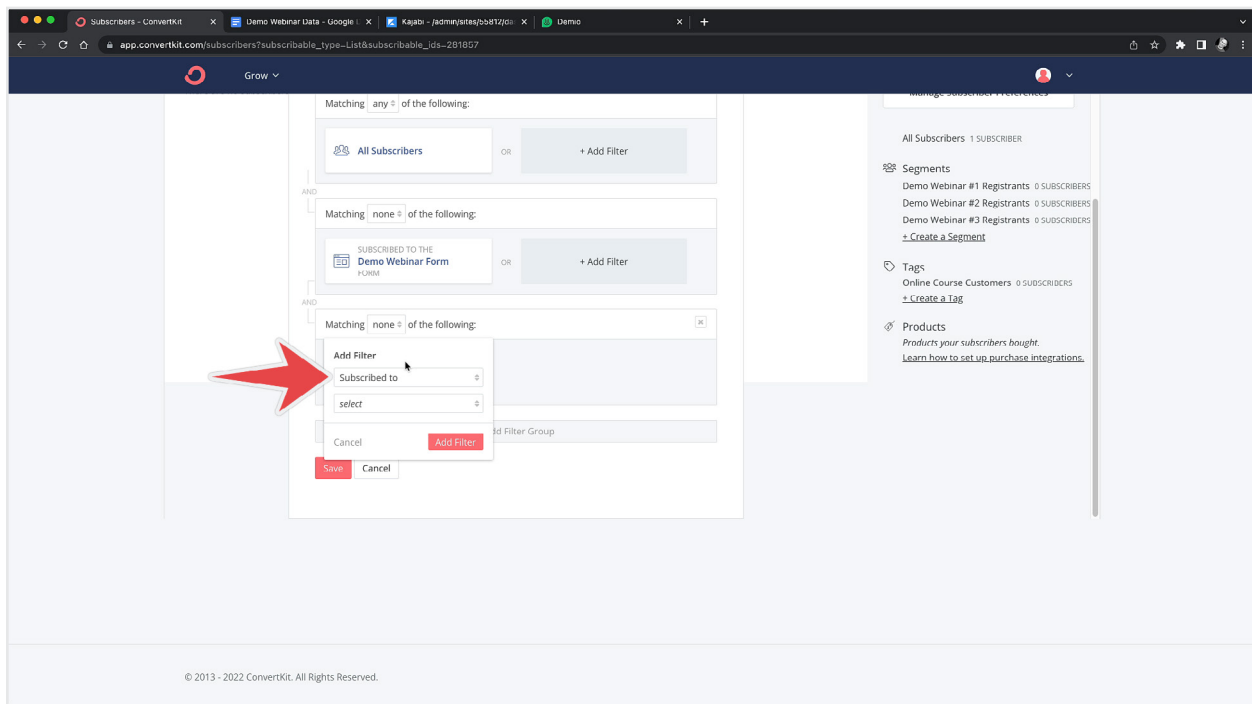
For **Matching**, select **None**:



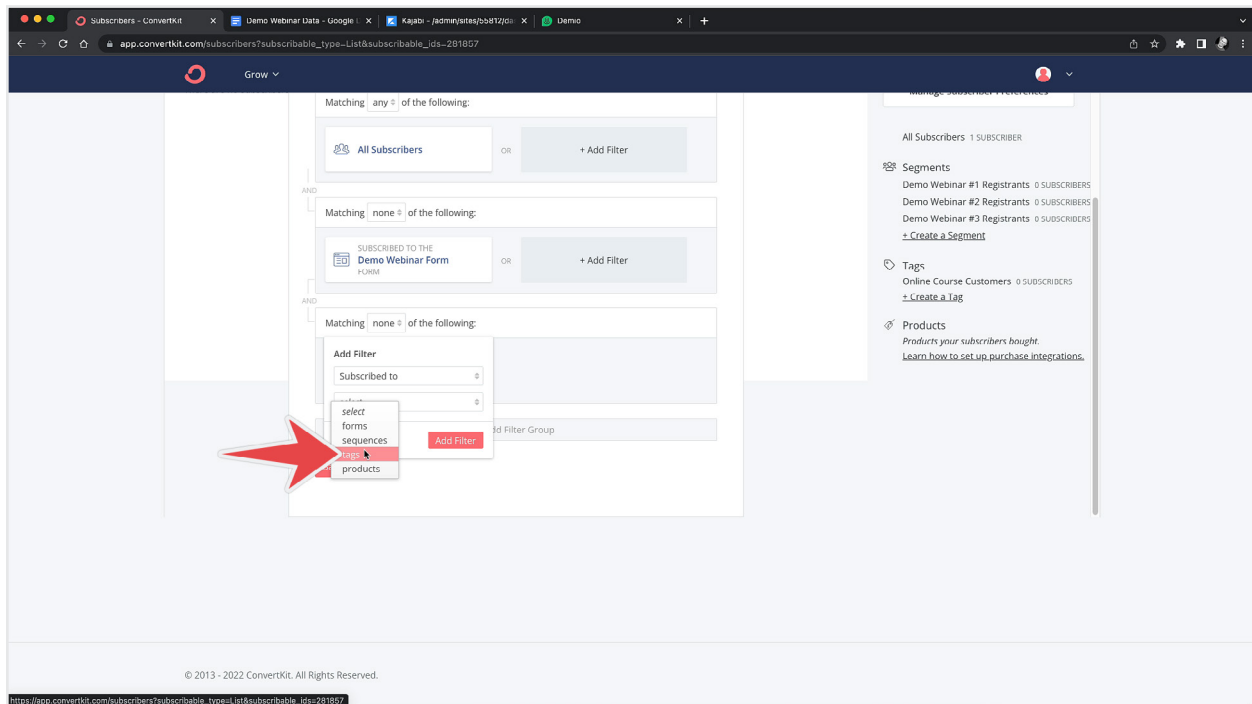
Click on **Add Filter**:



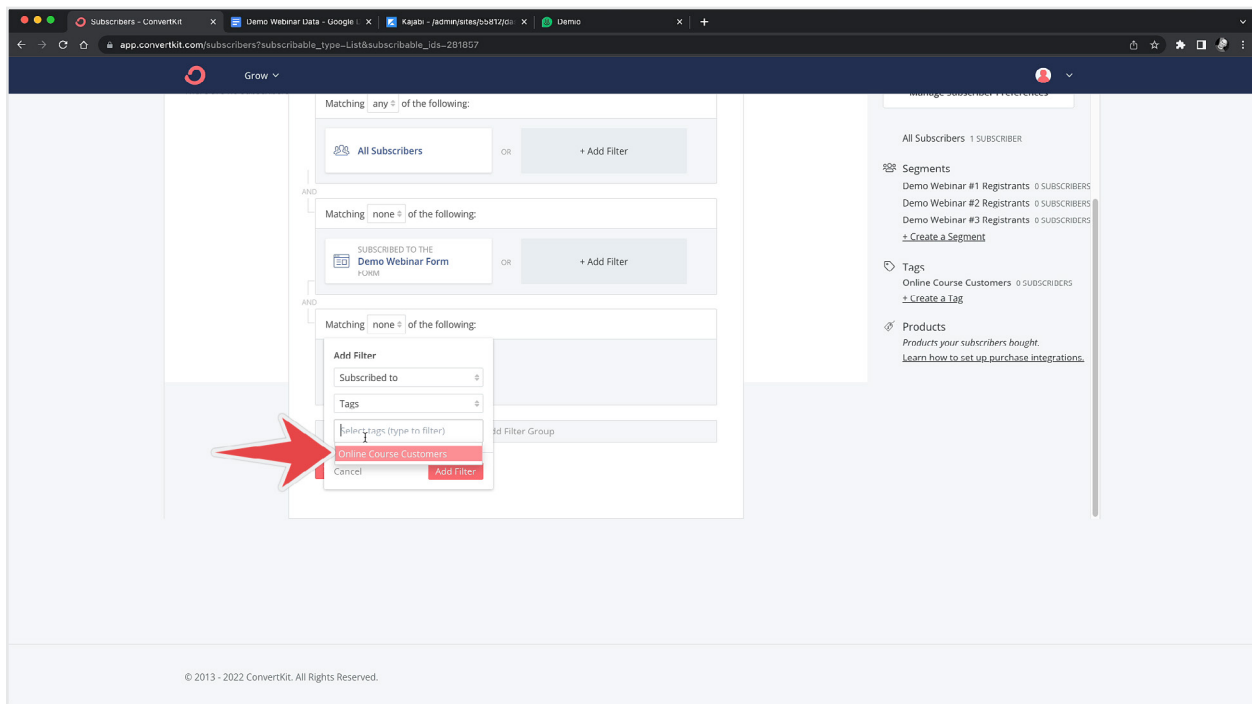
Leave the first dialog set to **Subscribe To**:



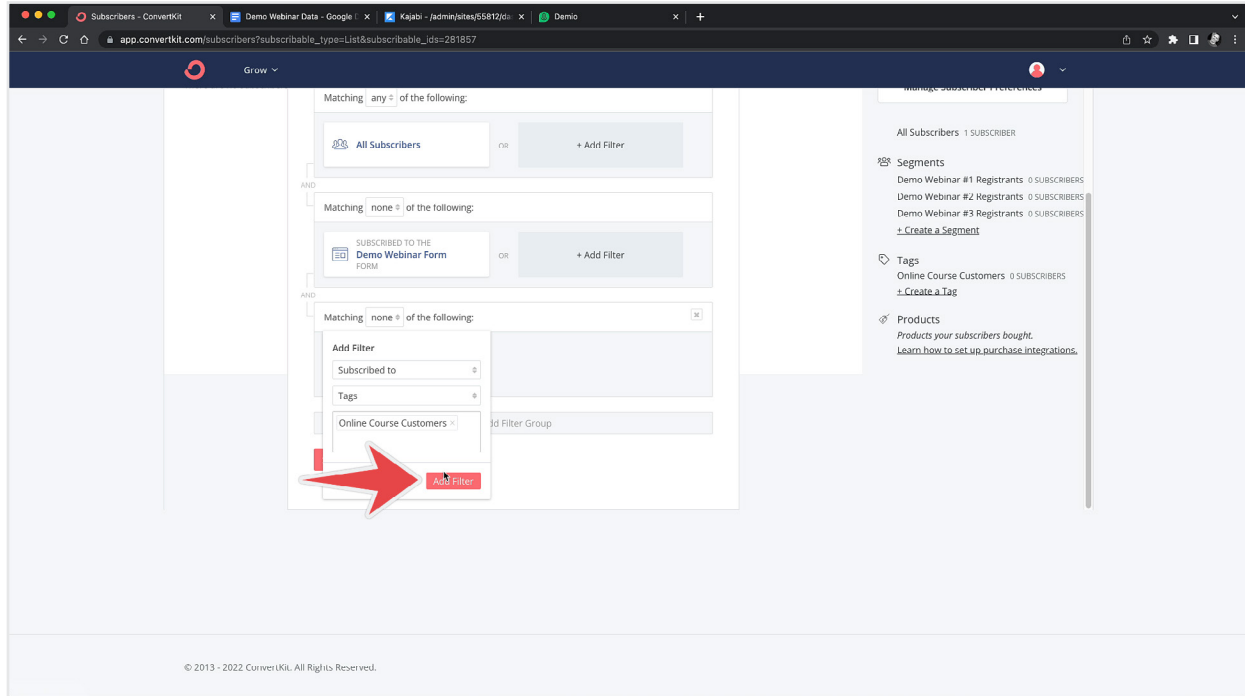
Click on the next dialog and choose **Tags**:



In the next dialogue, select the tag that identifies your course customers:

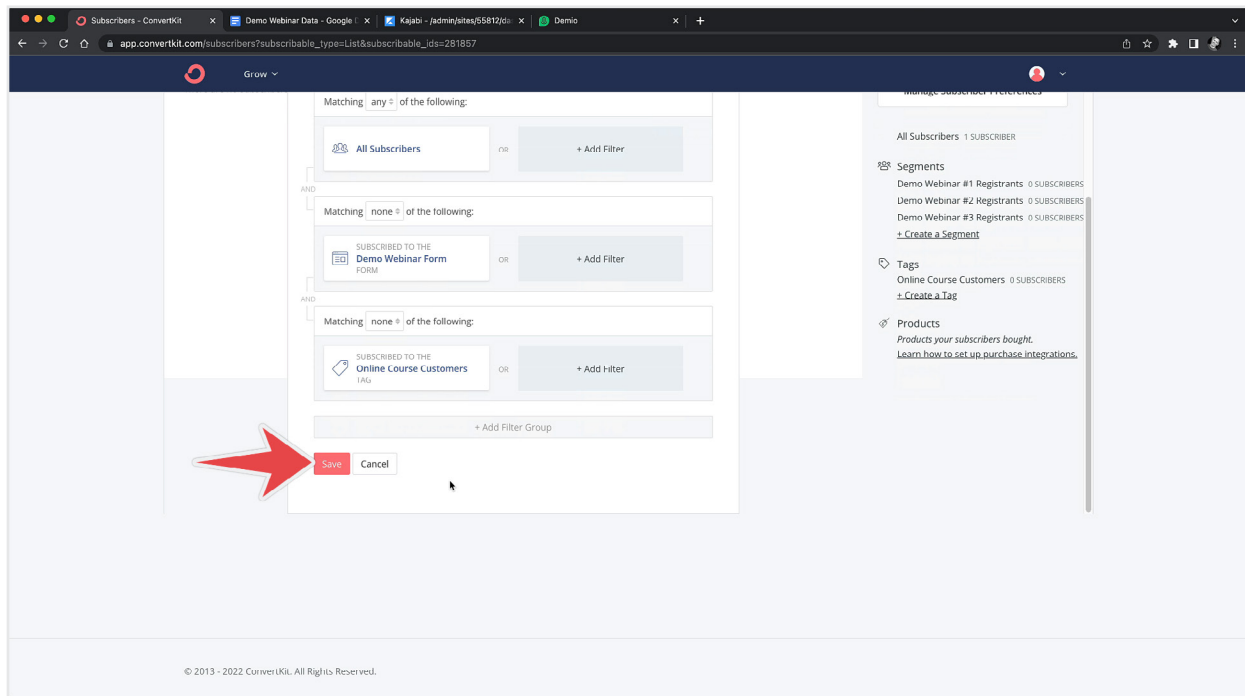


And then click **Add Filter**:



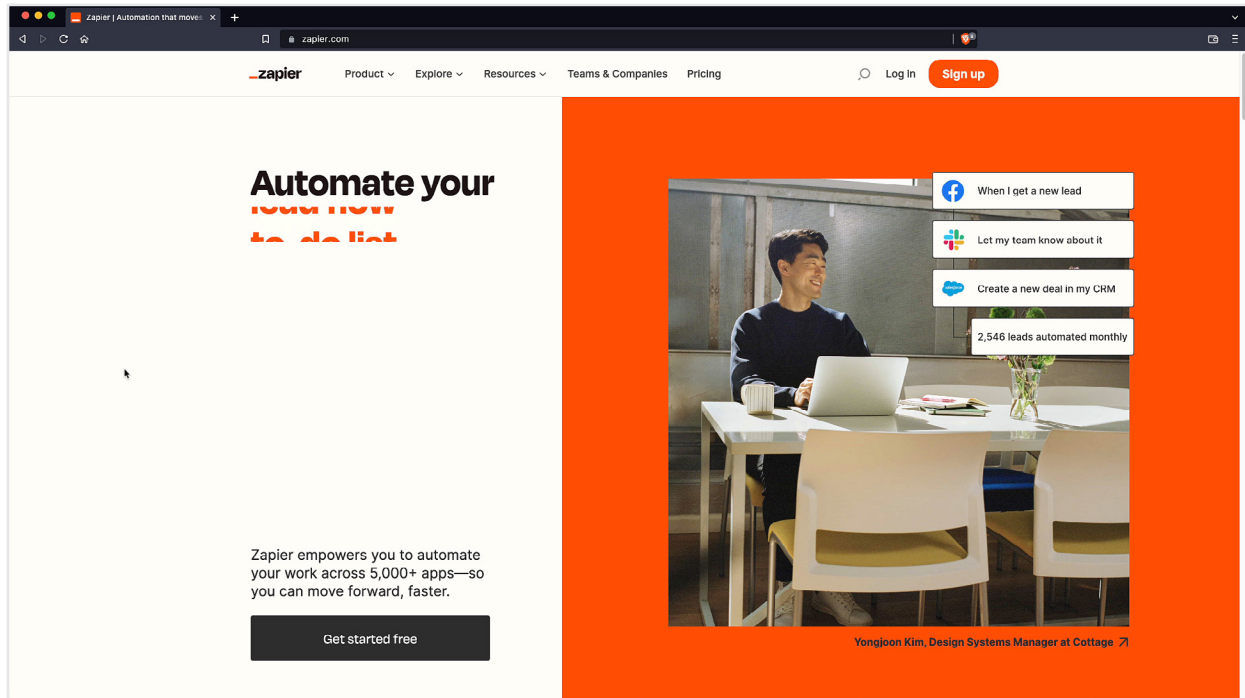
So for this sales booster segment, it will contain all of your subscribers who have never registered for a webinar and who have never purchased your course.

Finally, click on **Save**:

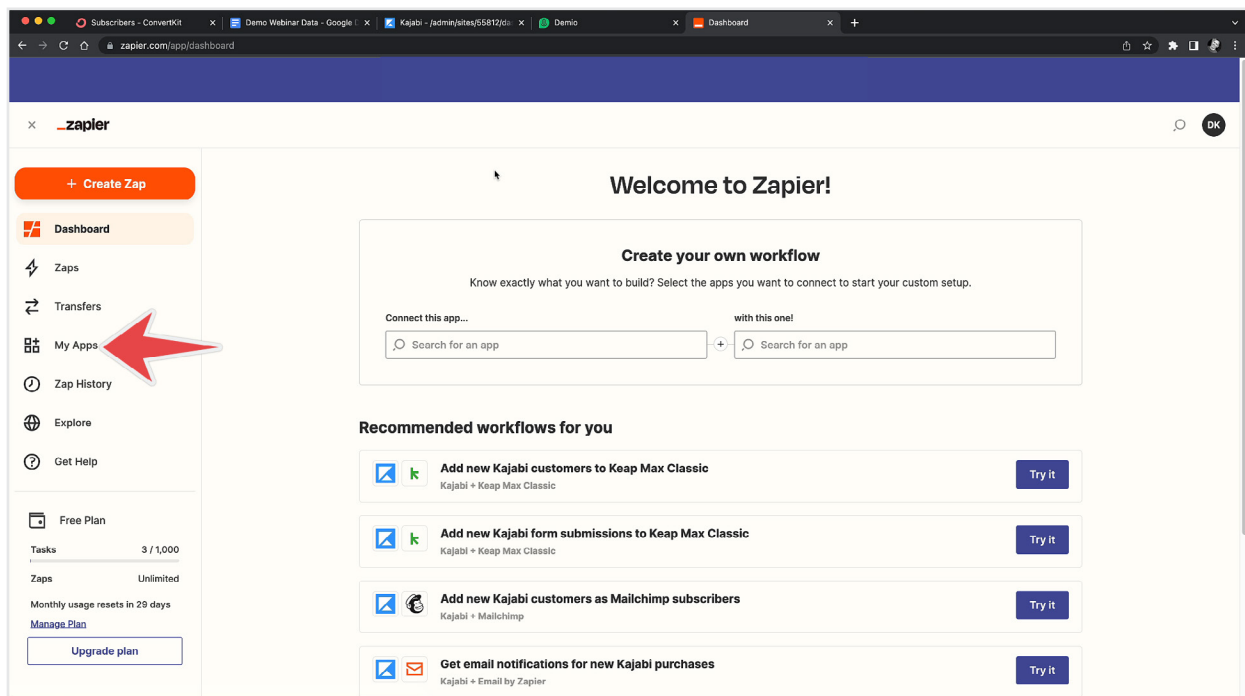


And that's it for ConvertKit, at least for now. Next you're going to begin working in Zapier, which is that free service that connects Kajabi, ConvertKit and Demio together, so they can share data with each other.

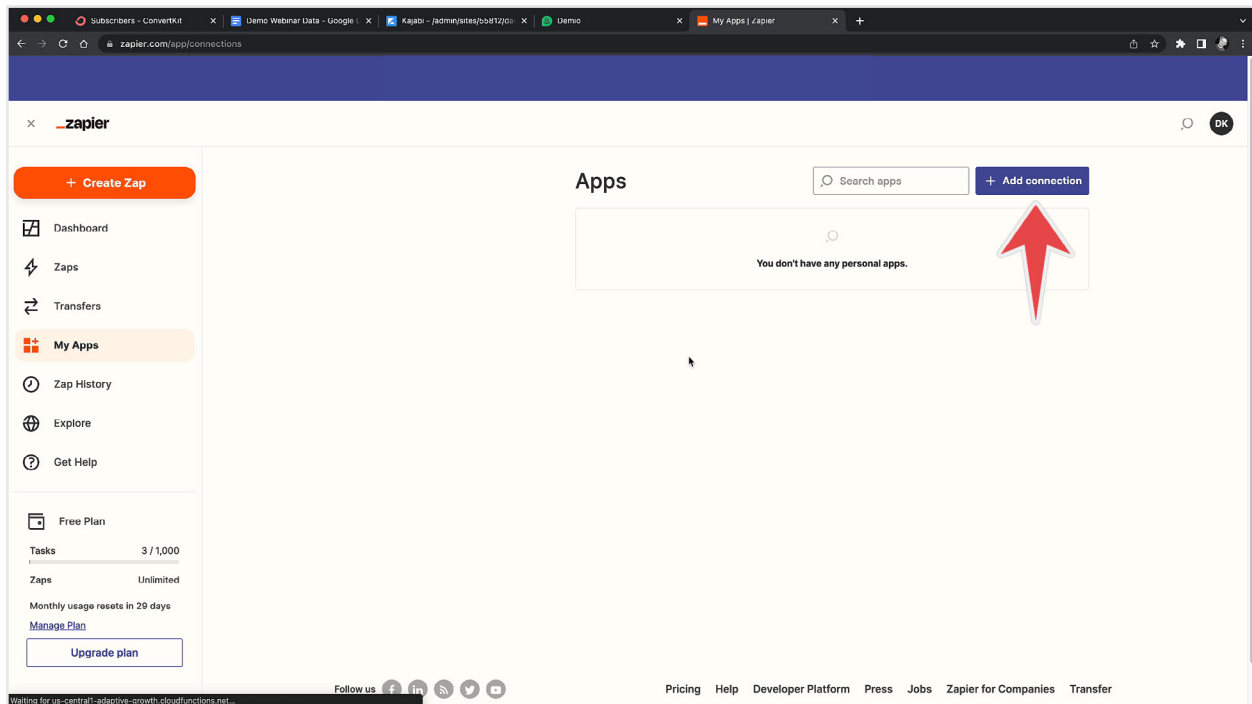
Go to **zapier.com** and create a free account:



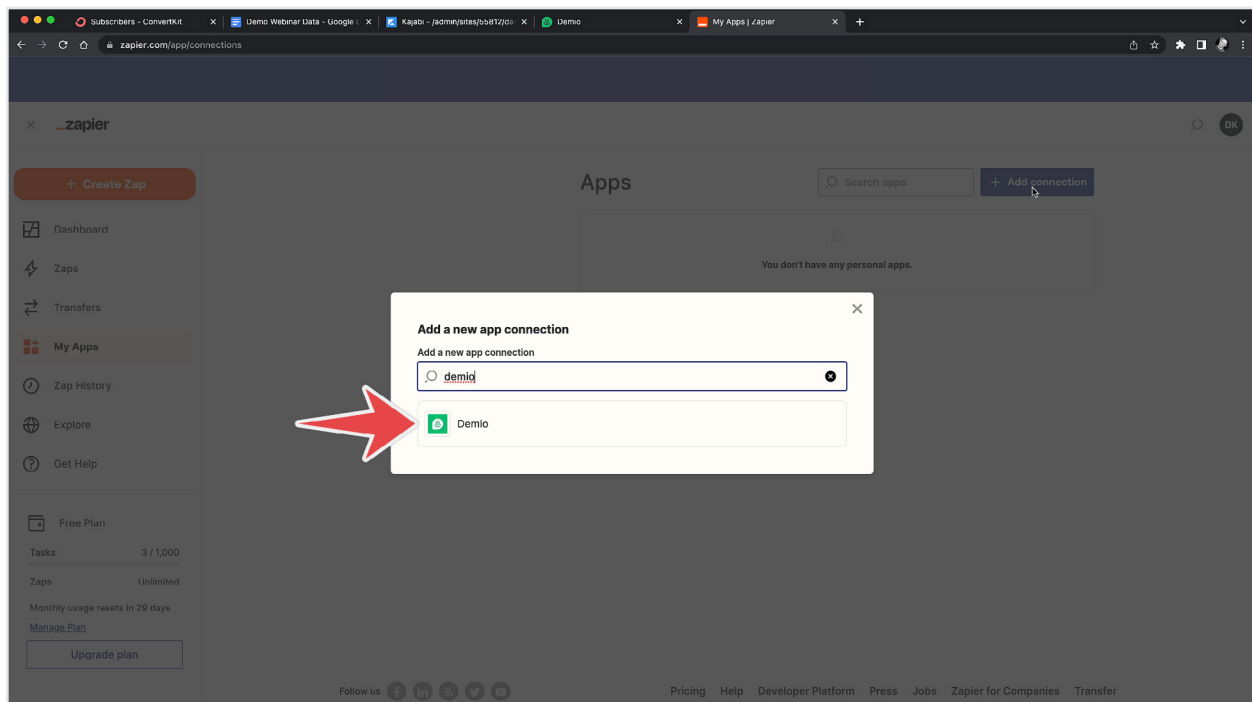
Log into your account, go to the sidebar to the left and click on **My Apps**:



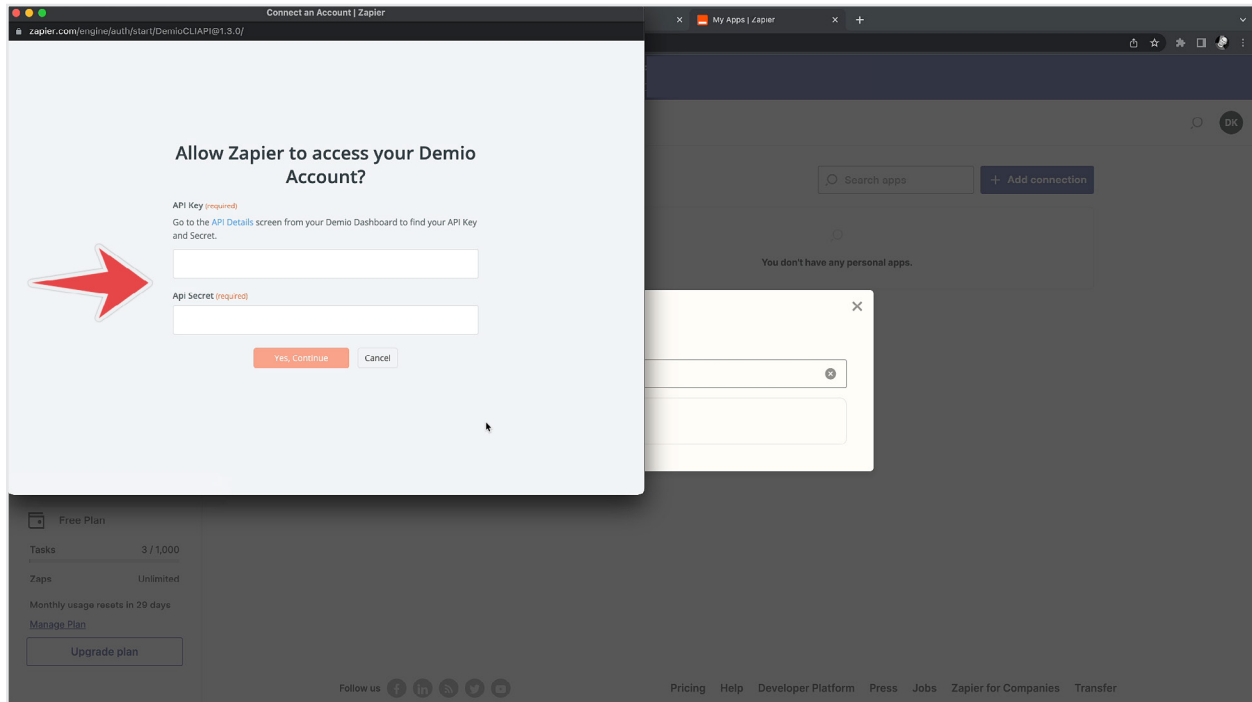
Then click the Add Connection:



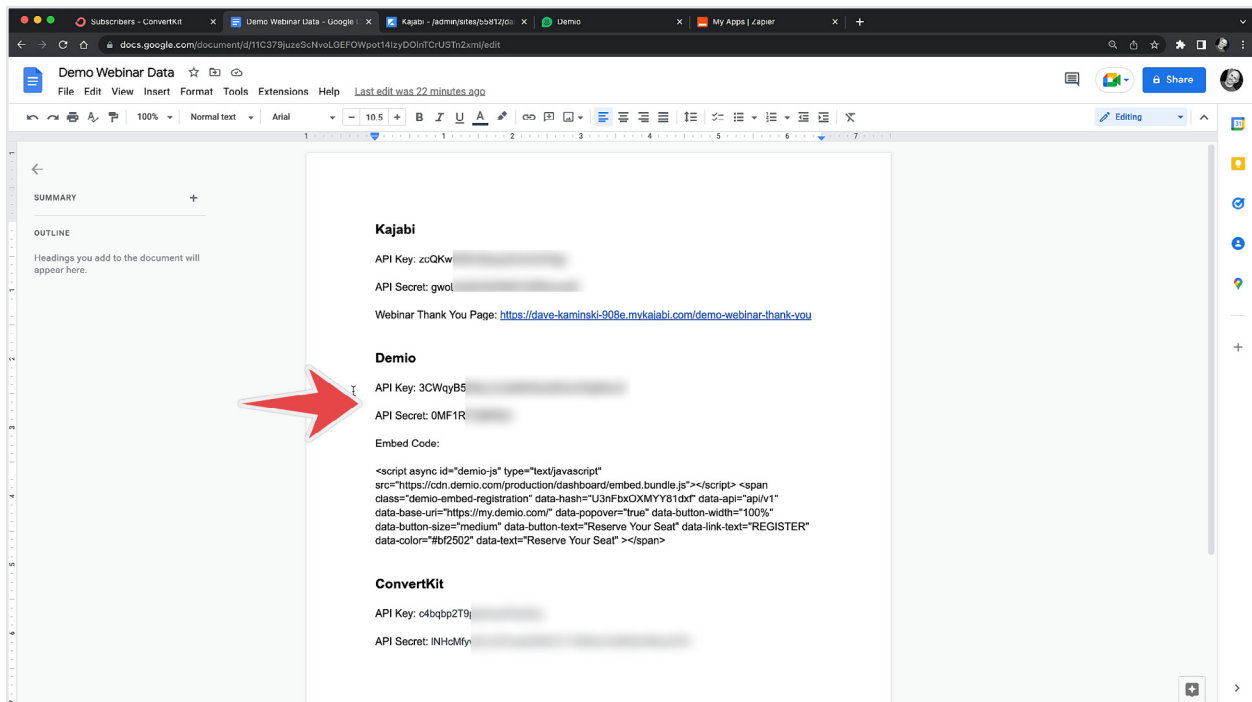
Start typing in **Demio** and then select it from the results:

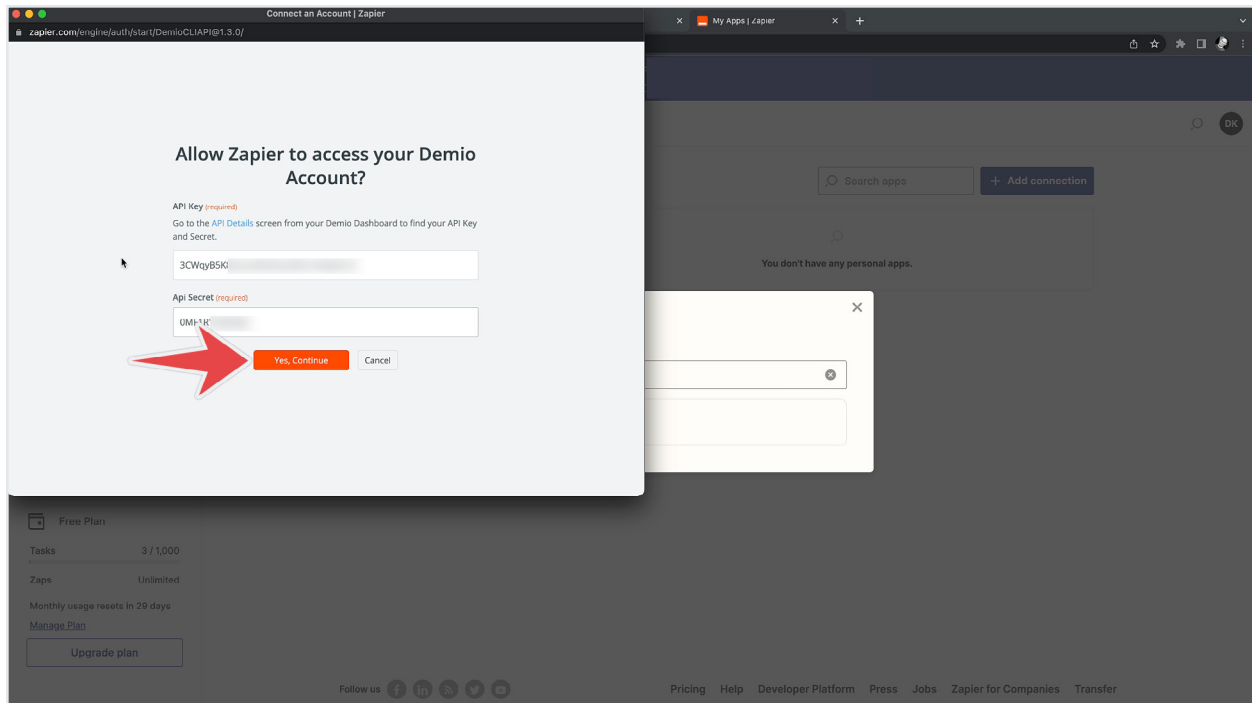


A new window will appear asking you to enter your **API key** and **API secret** for Demio. And guess what? You already stored those in your Google Doc:

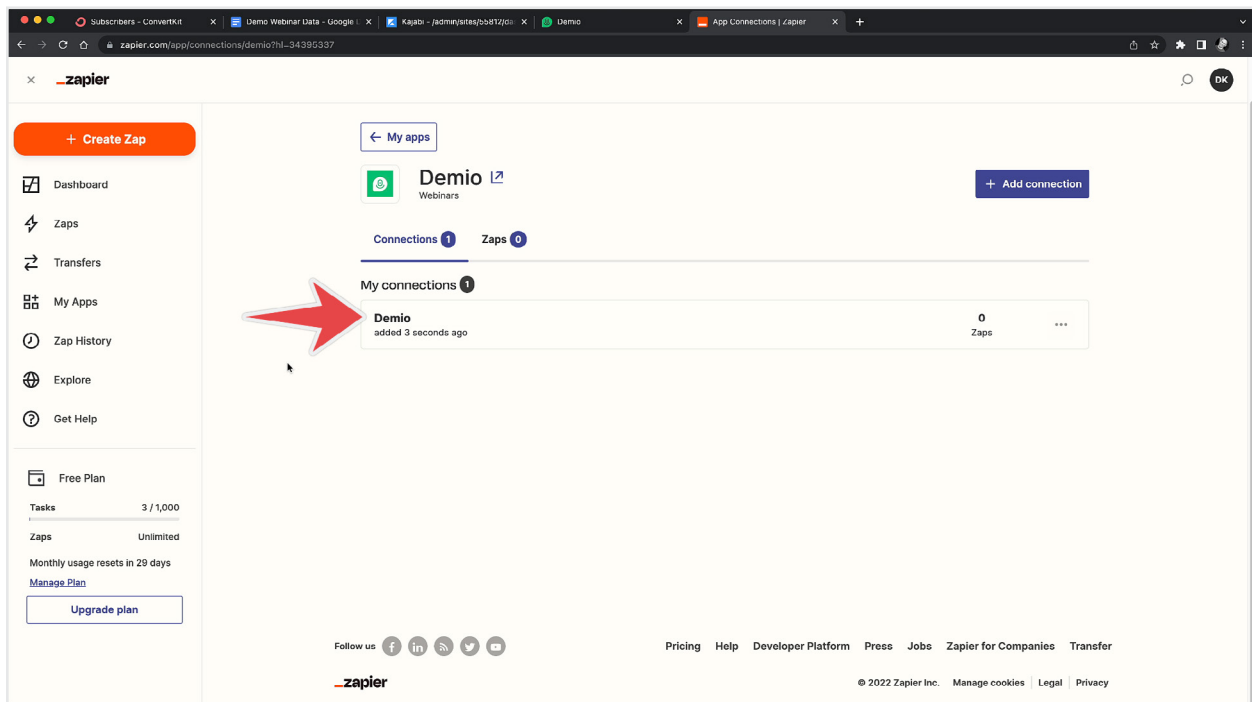


Copy the keys from your Google Doc, paste them into Zapier and click on **Yes, Continue**:

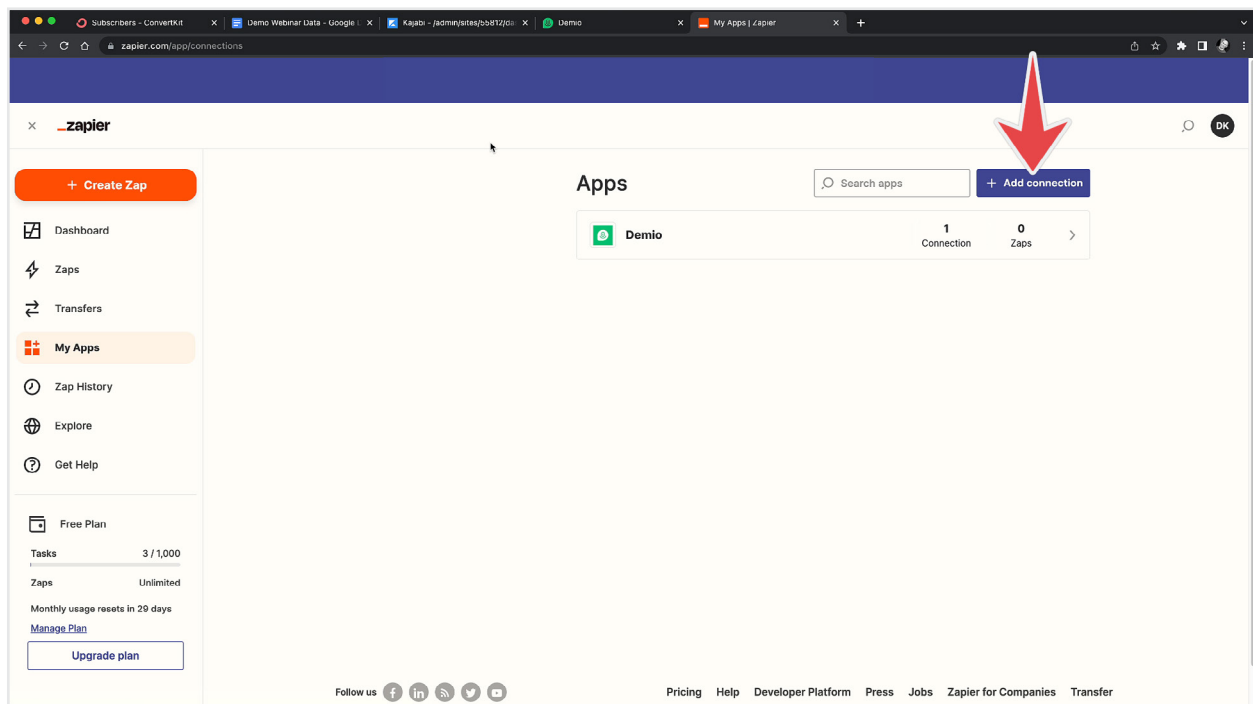
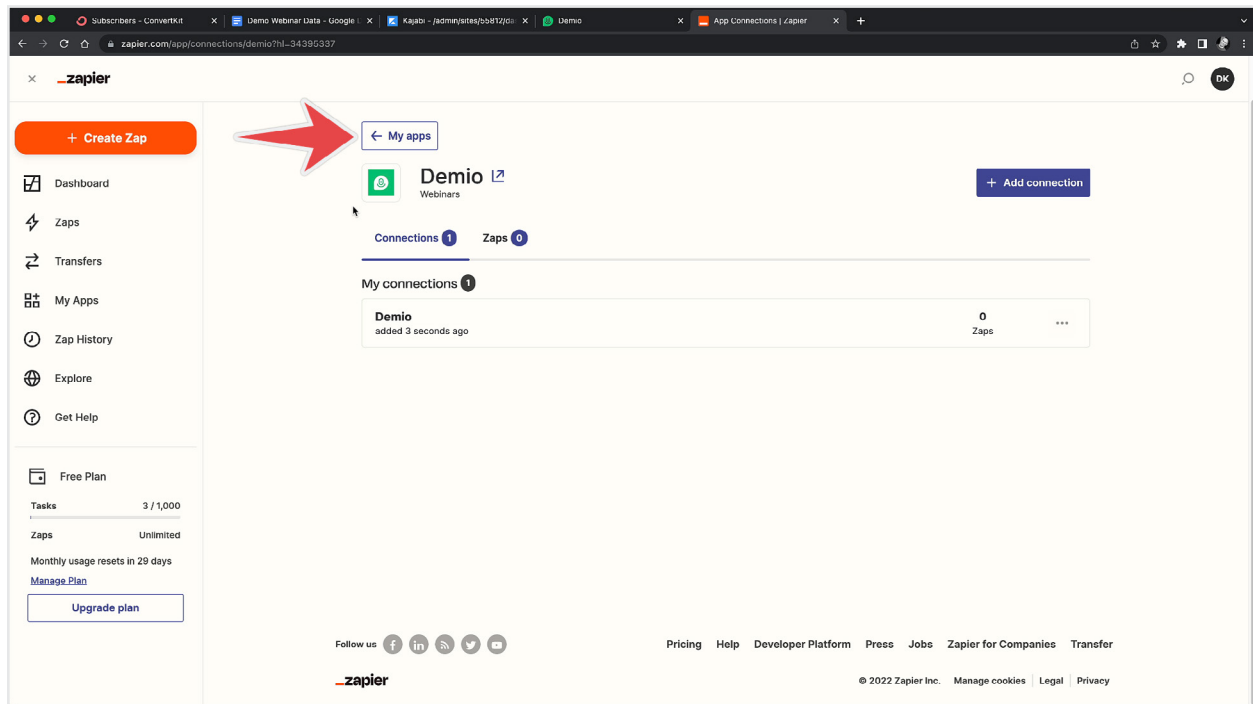




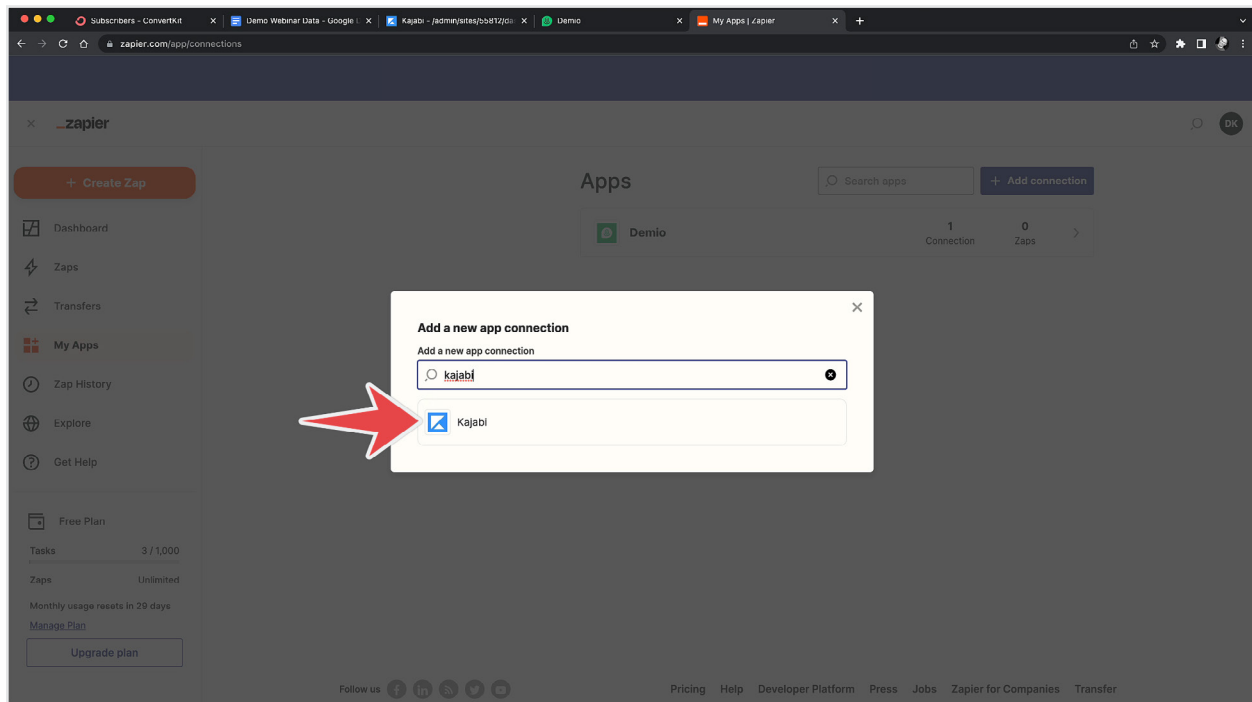
And now Demio is connected to Zapier:



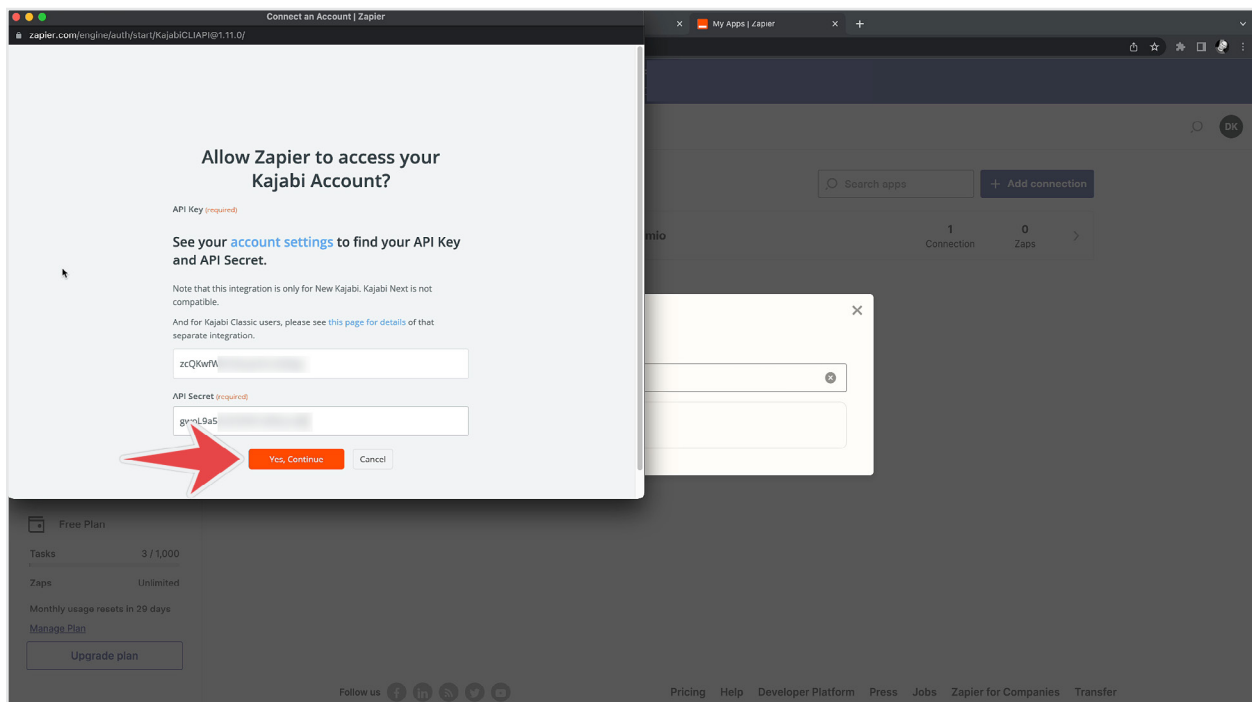
Next, click on **My Apps** and then click on **Add Connection**:



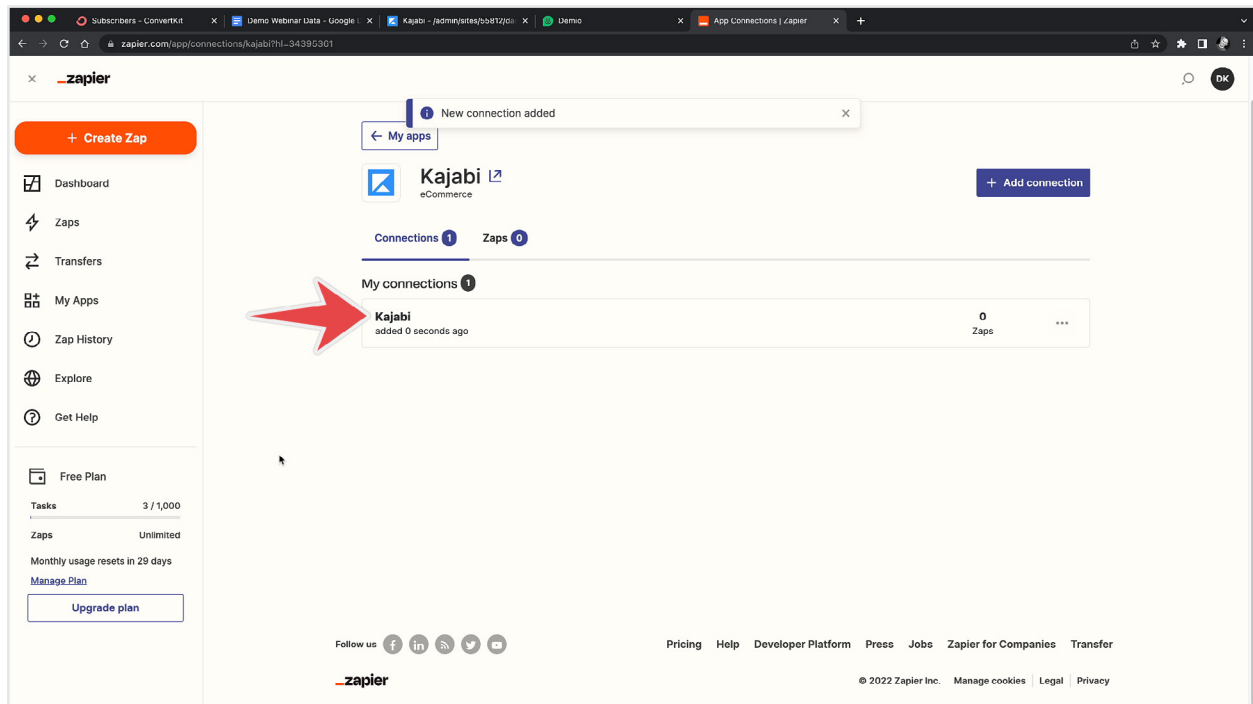
Type in **Kajabi** and select it from the results:



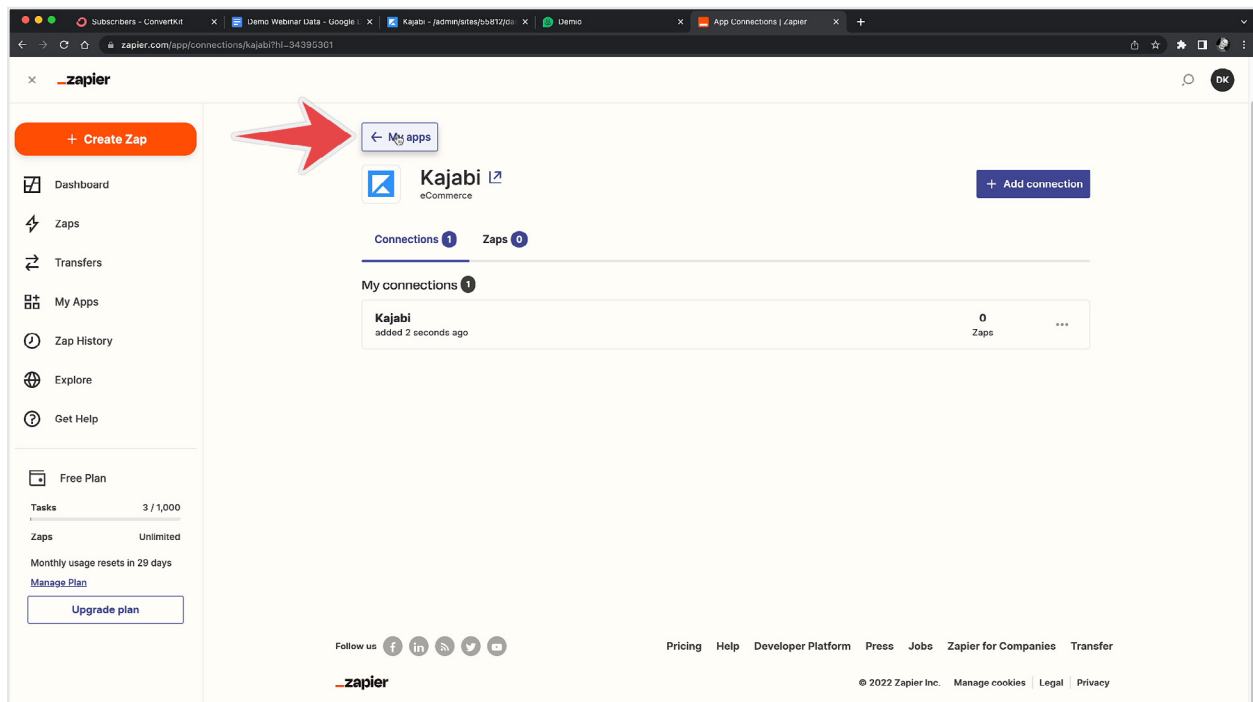
Once again, you'll see a window where you need to go to your Google Doc, copy your API and our API secret keys for Kajabi and paste them into this window. Once you've done that, click on **Yes, Continue**:

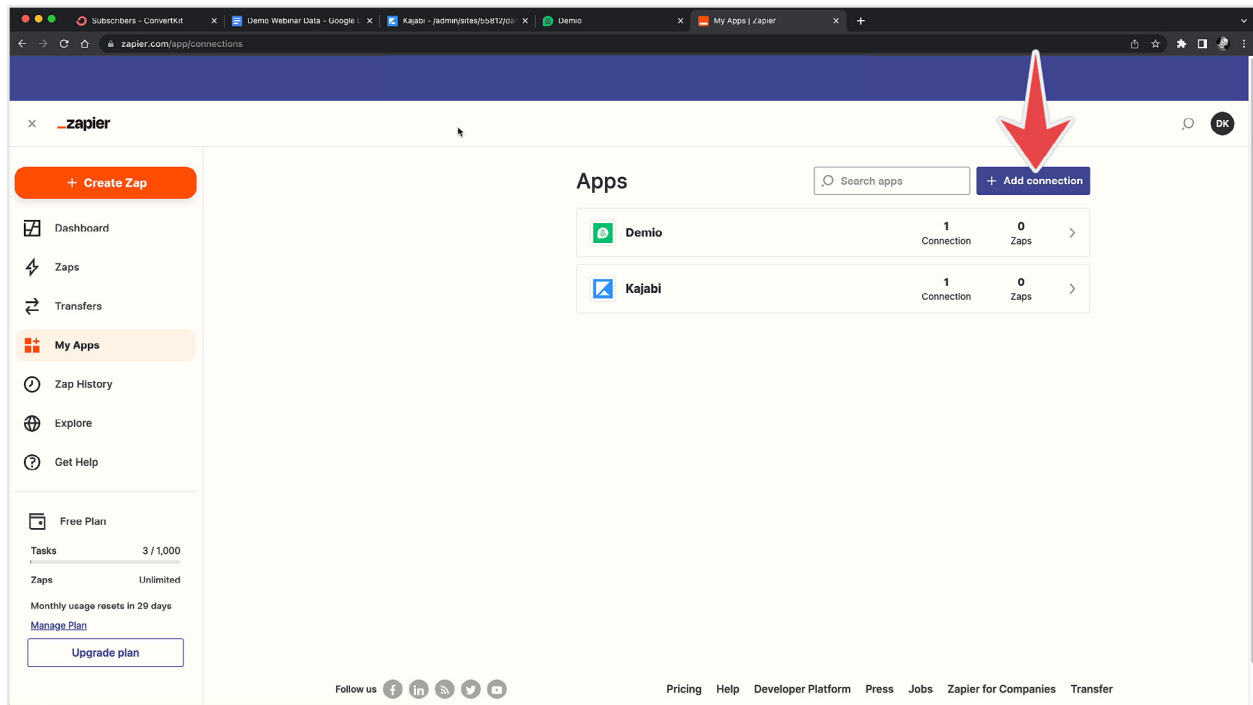


And now Kajabi has been connected to Zapier:

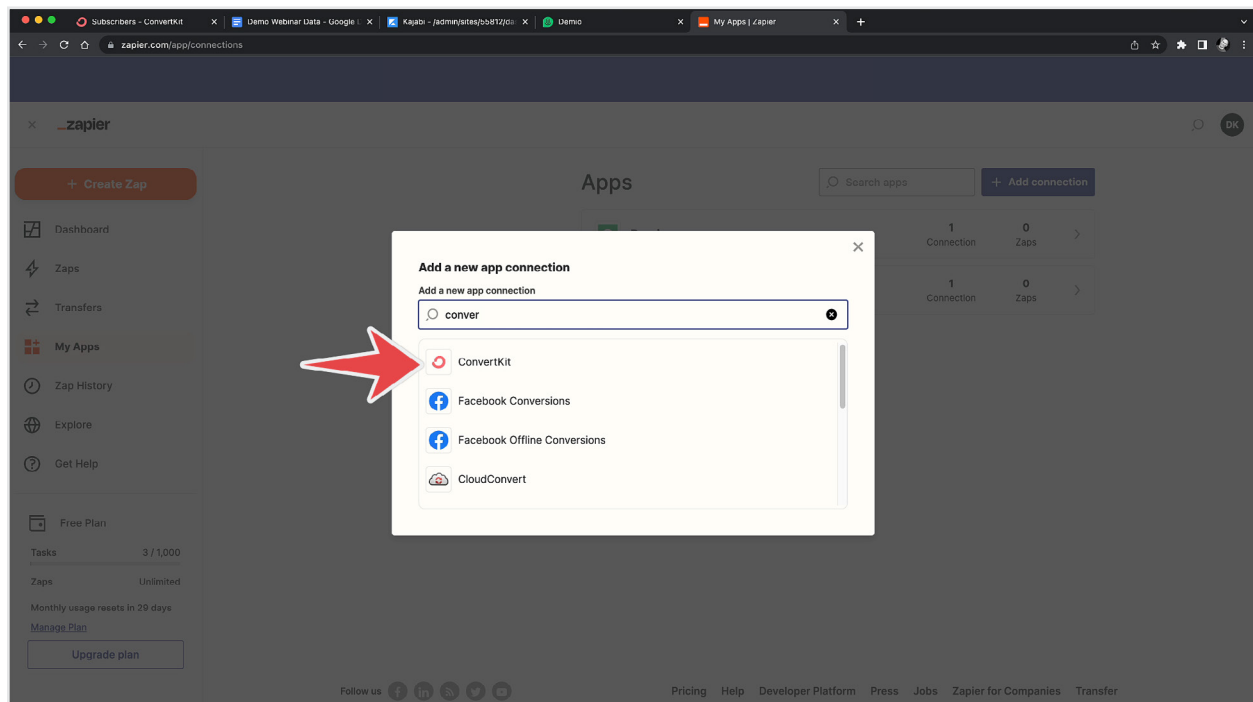


Next, click on **My Apps** and then click on **Add Connection**:

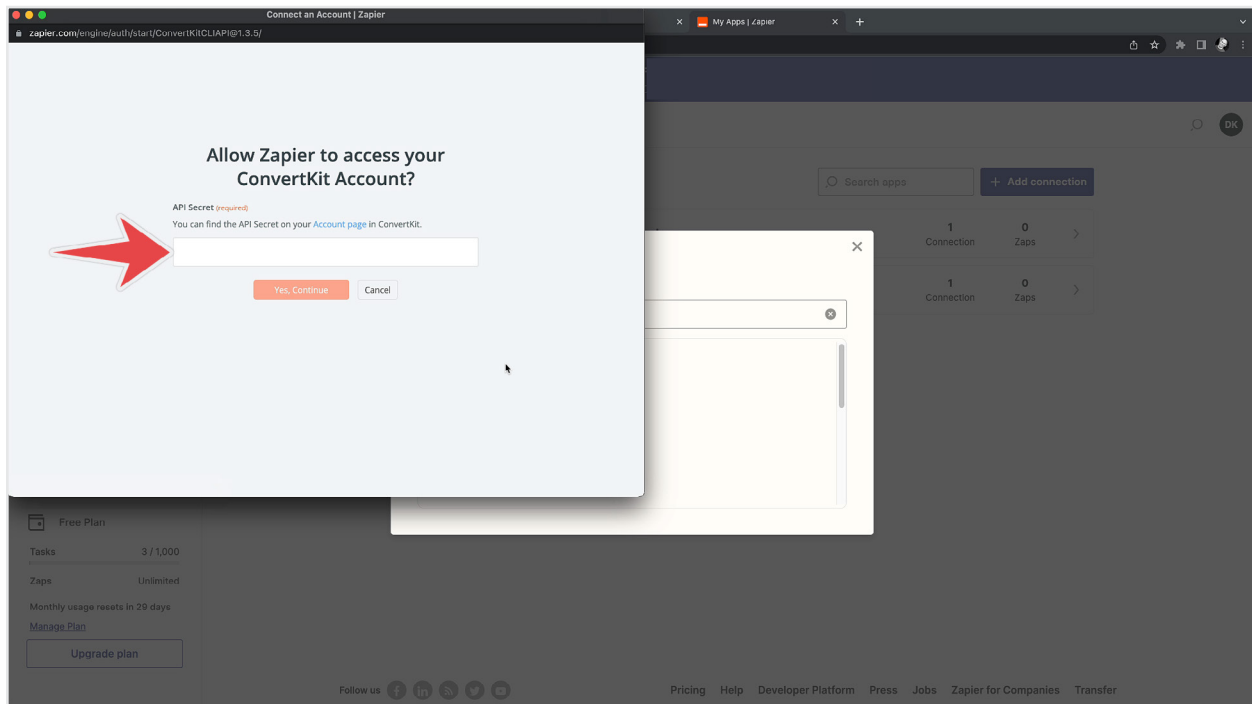




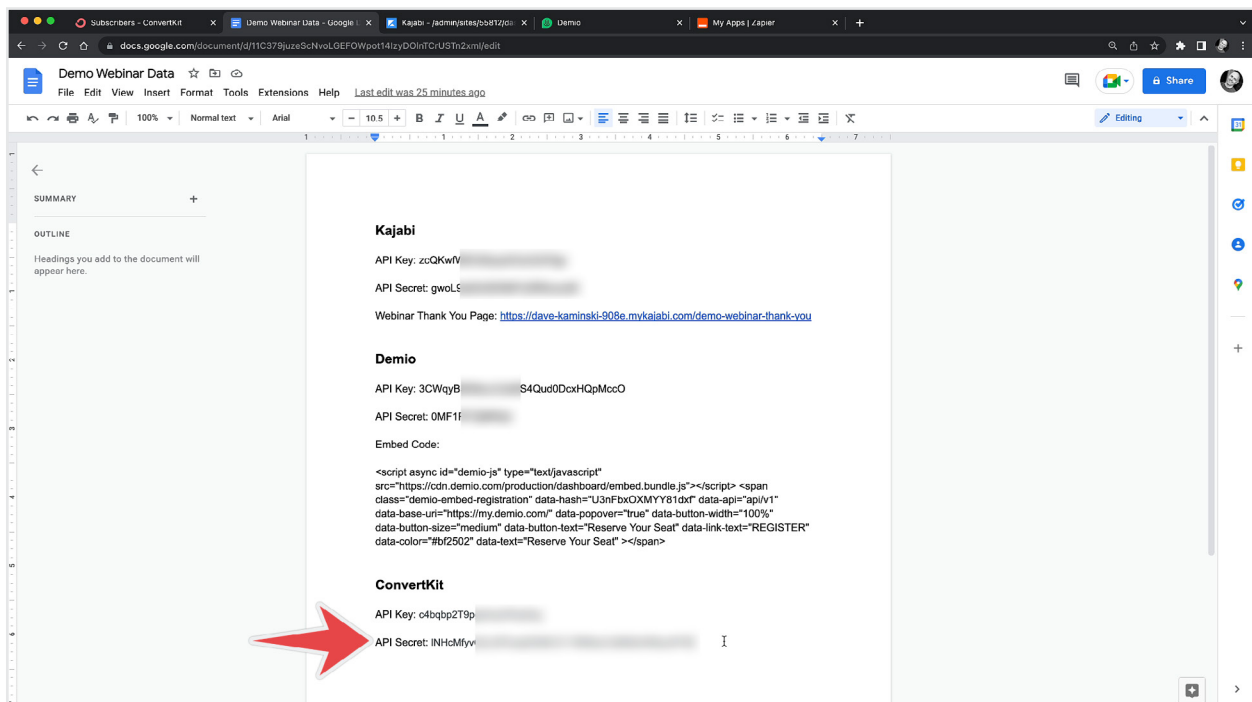
In the dialogue that appears, type **ConvertKit** and select it from the results:



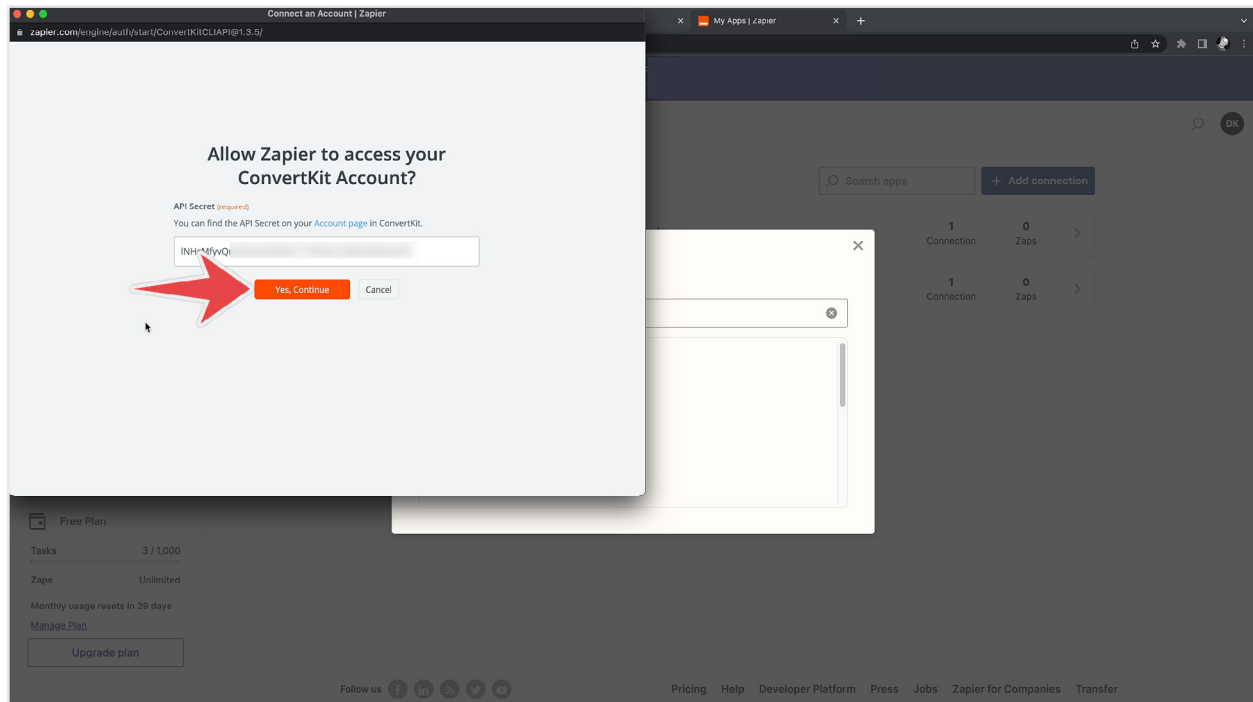
Once again, a window will open up, but this time they're only asking for the **API Secret**:



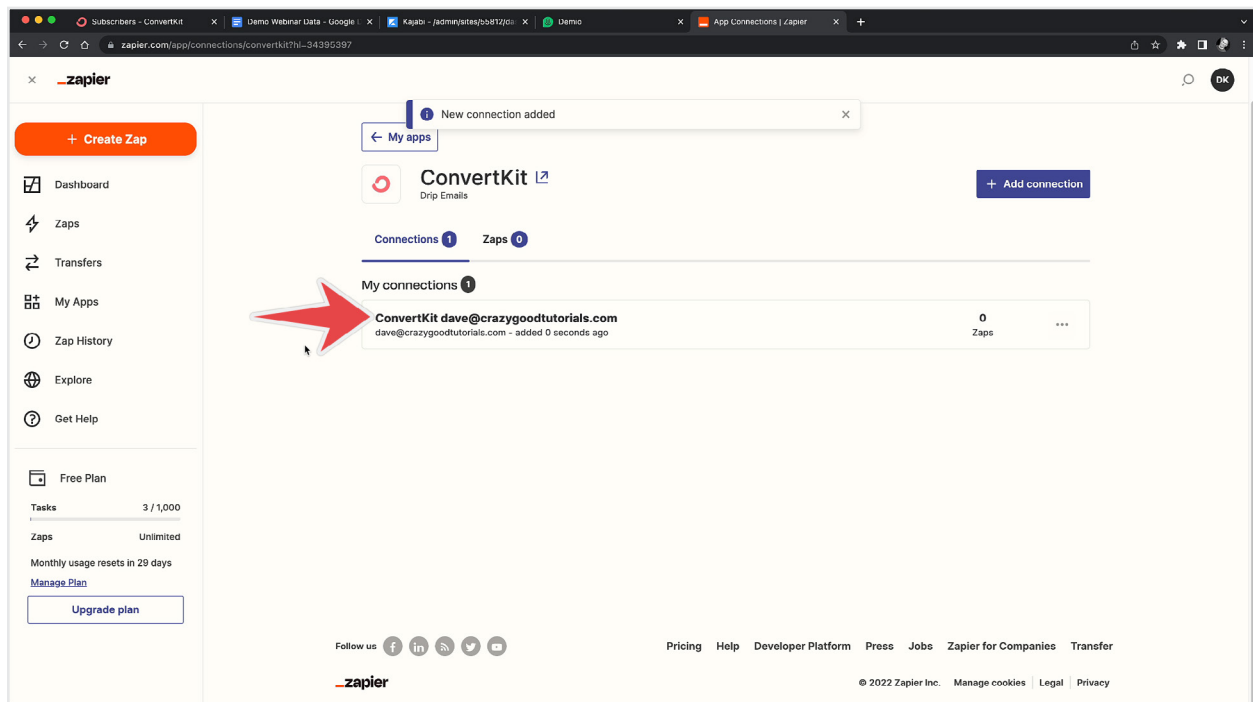
Copy the API Secret from your Google Doc:



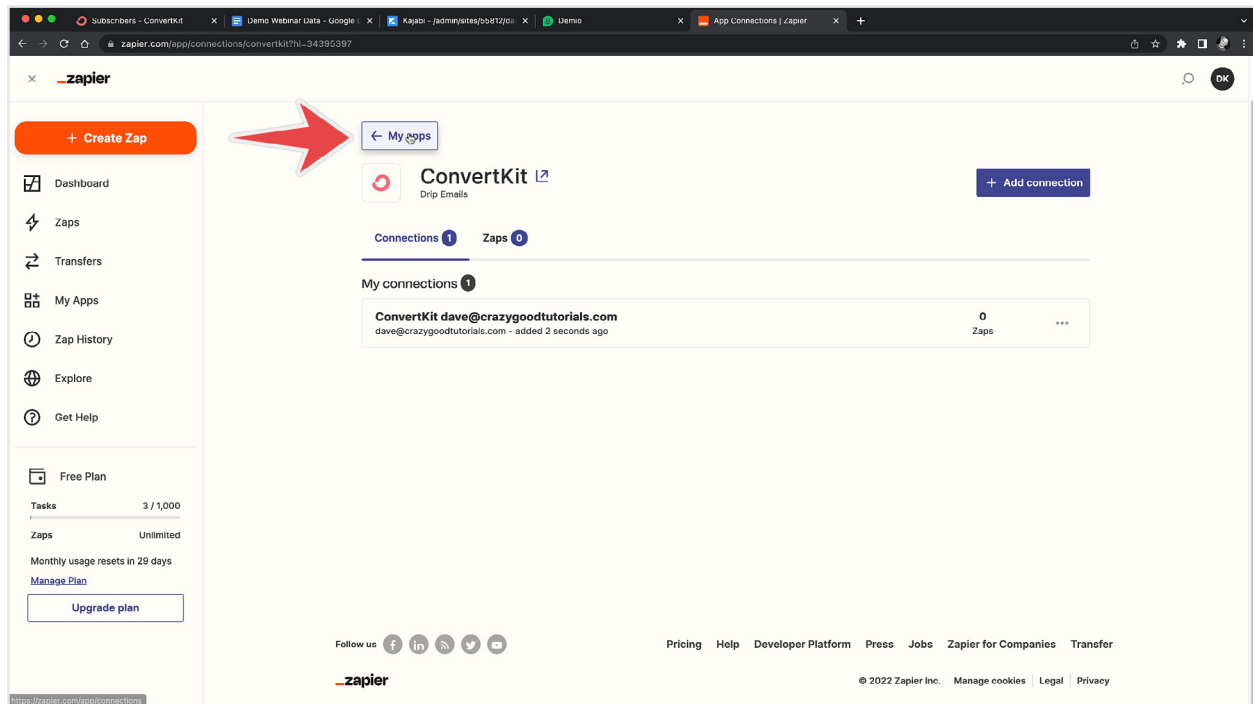
Paste it into Zapier and click **Yes, Continue**:



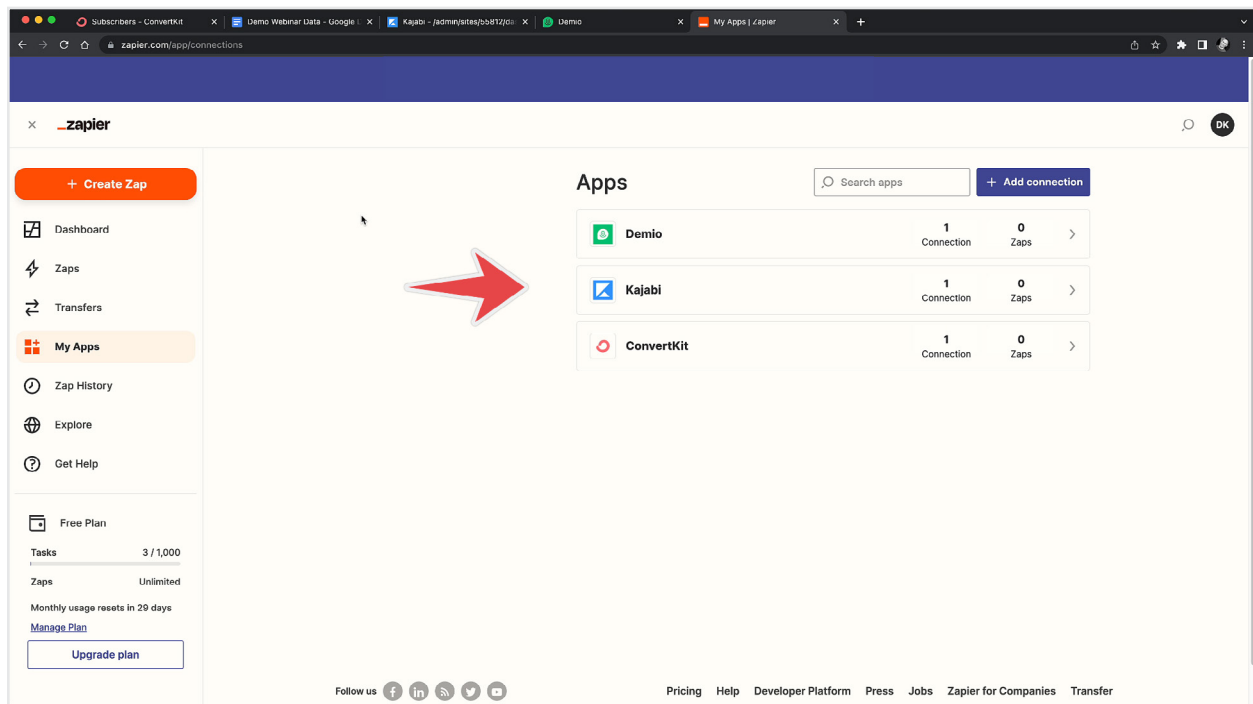
And now ConvertKitt has been added to Zapier:



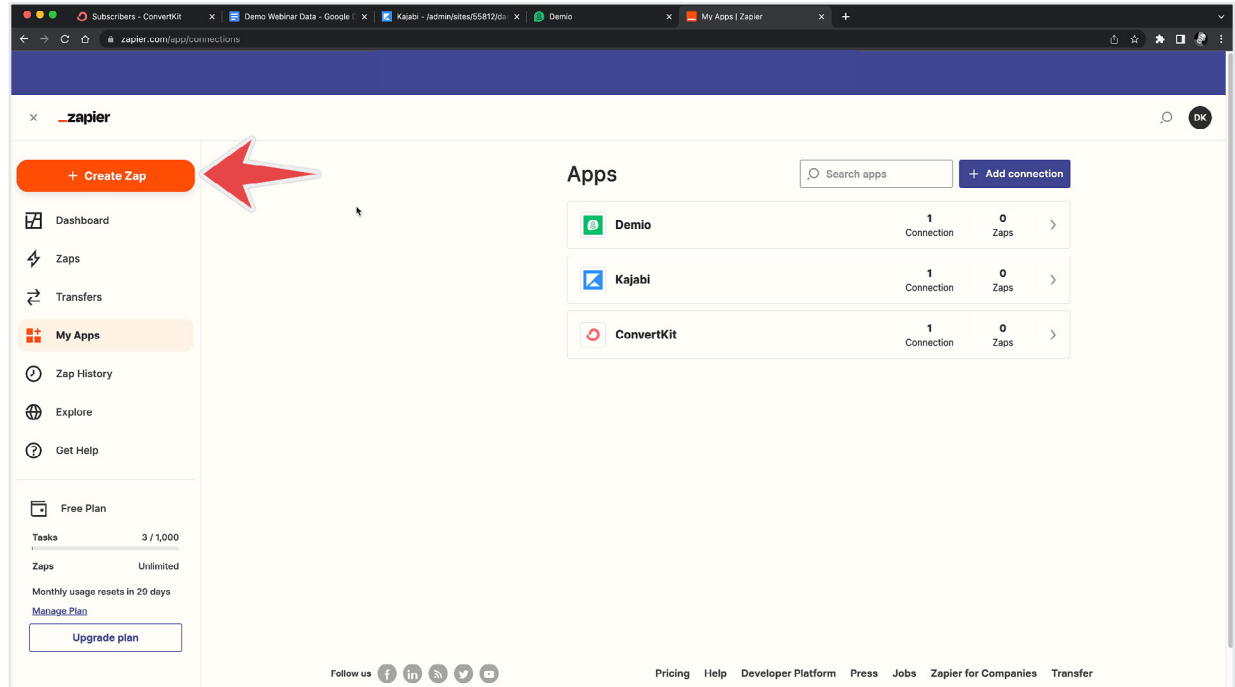
Go up and click on **My Apps**:



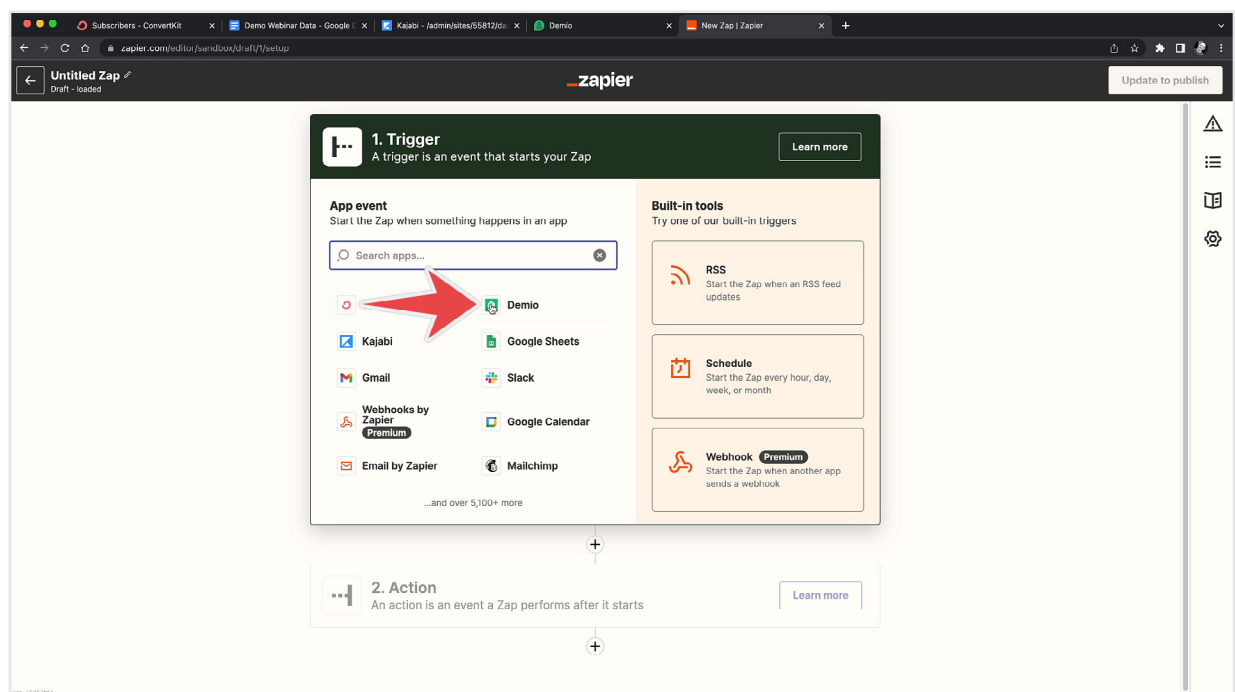
You can see that you are connected to Demio, Kajabi and ConvertKit:



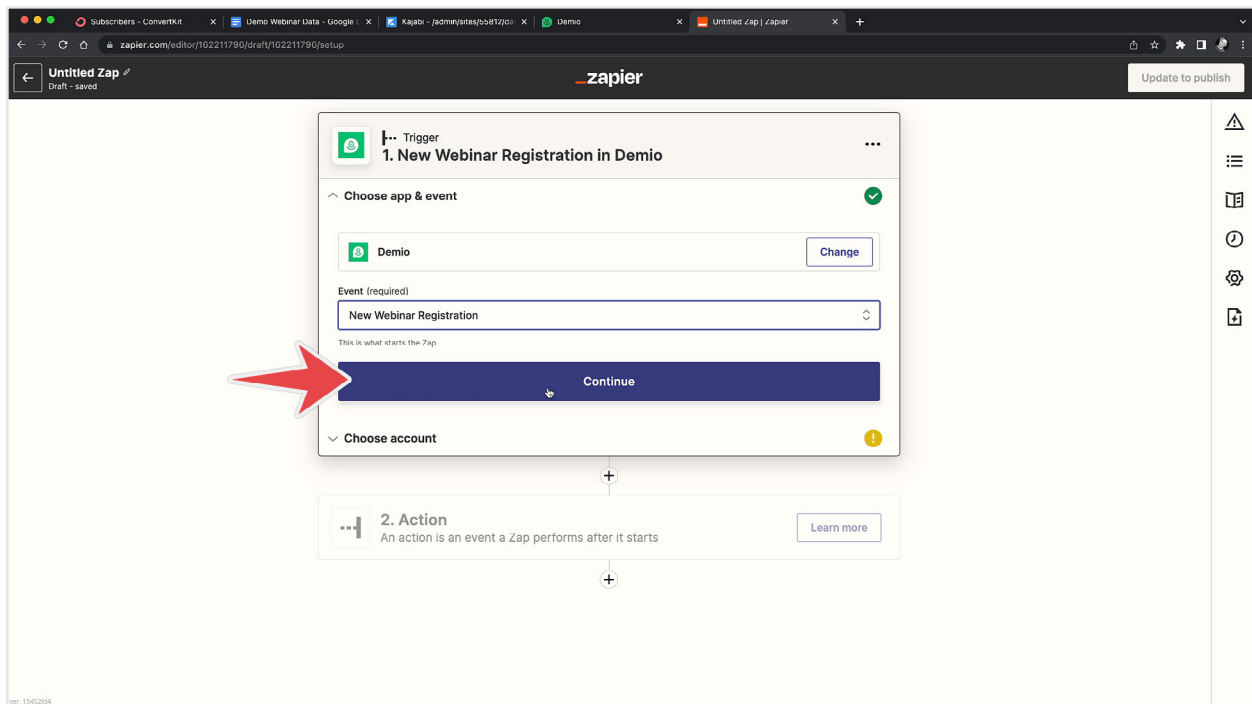
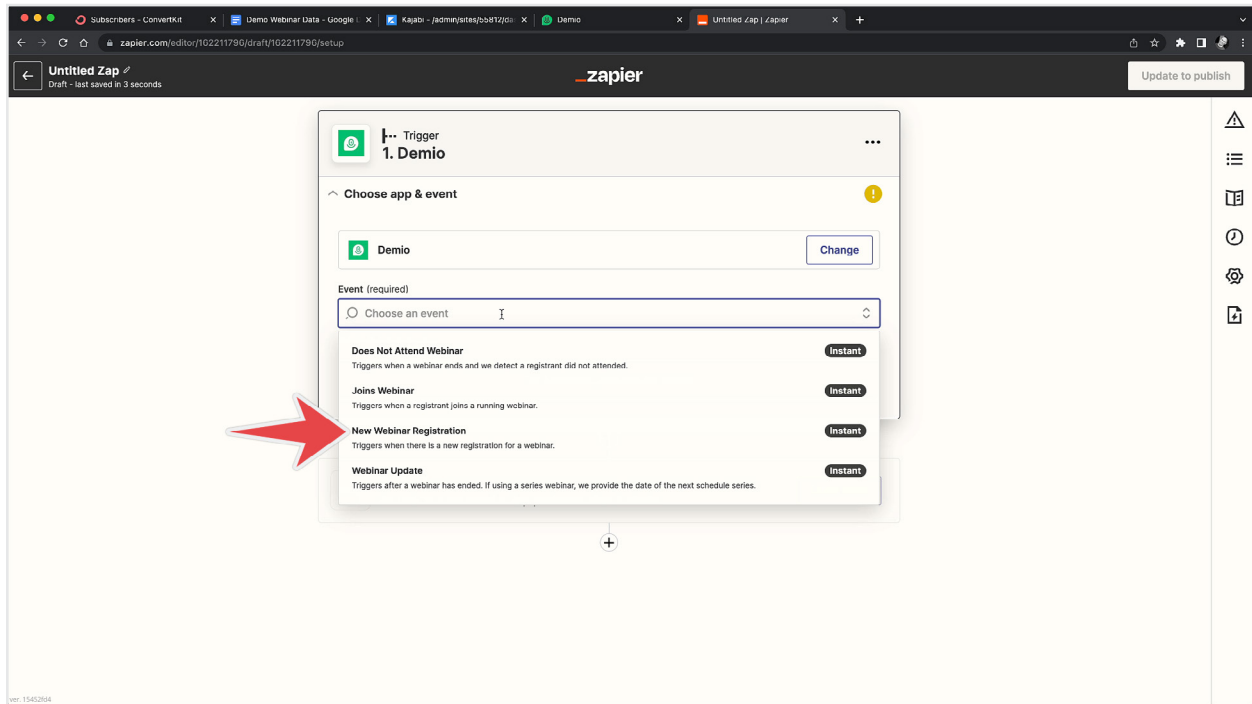
Now you need to create a **Zap**. That is an automation that allows these applications to pass information between each other. The first Zap you create is going to be between Demio and ConvertKit. Go to the sidebar to the left and click on **Create Zap**:



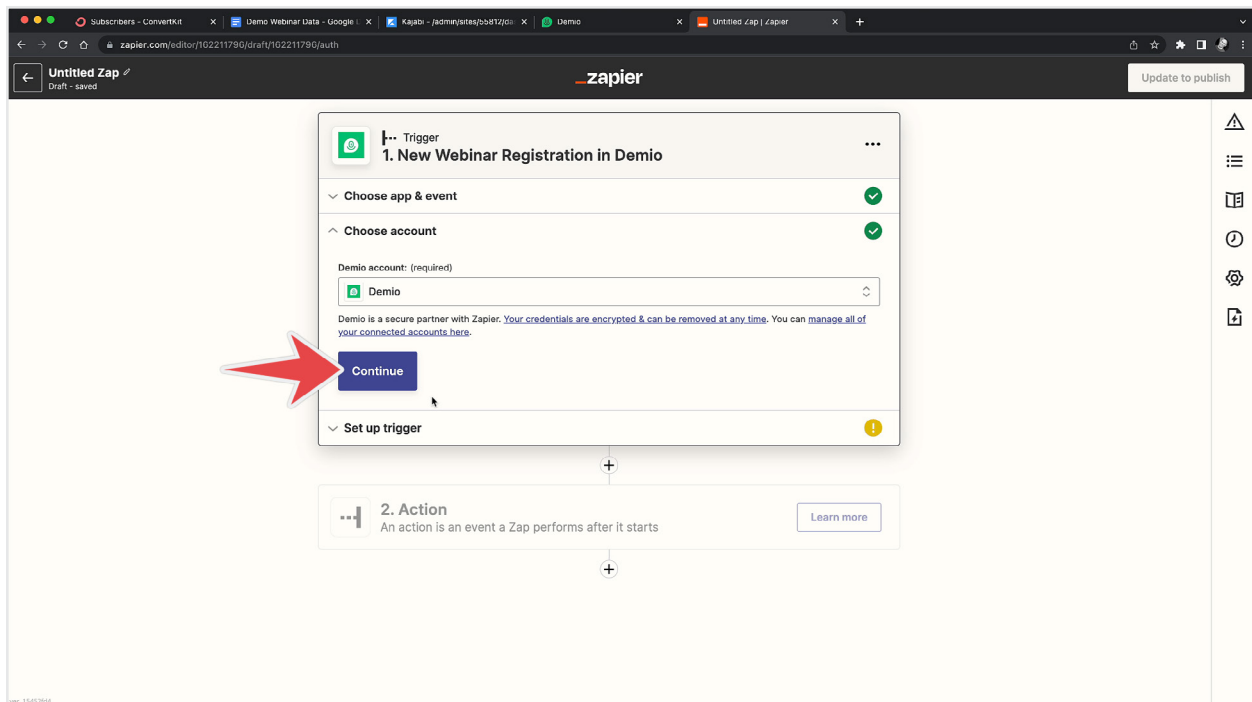
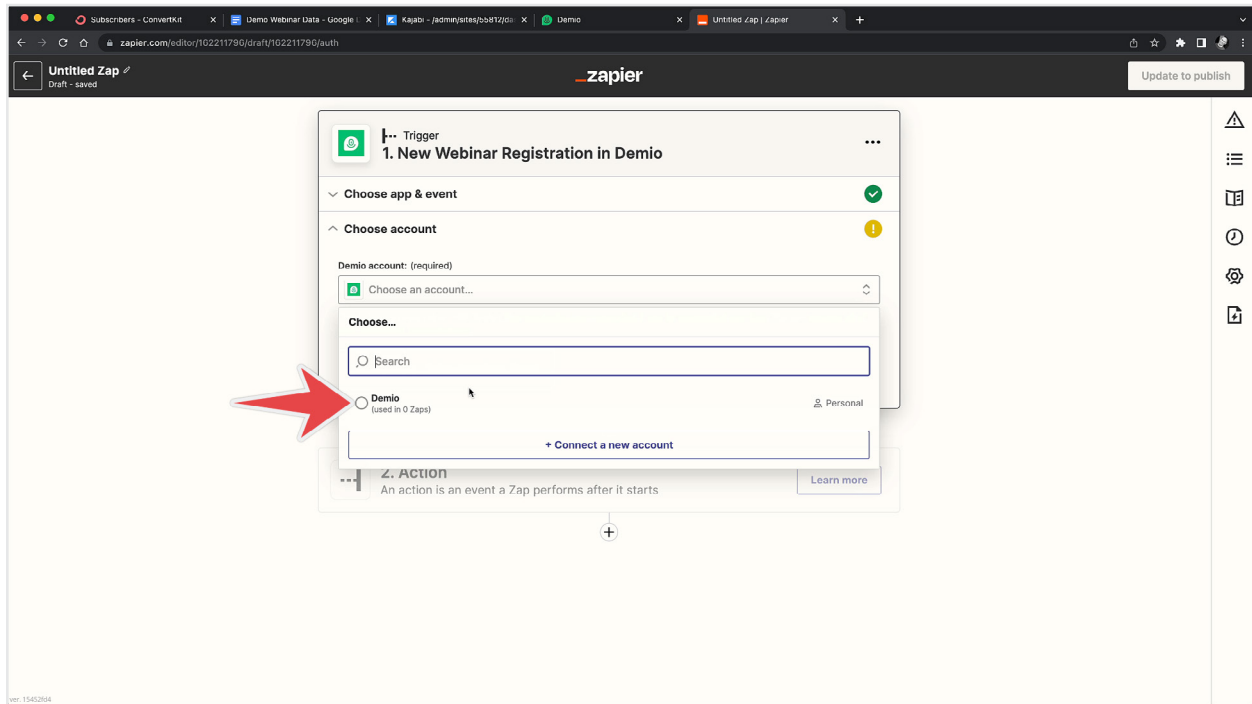
First you need to choose your **trigger event**, which will be when someone registers for a webinar in Demio. So click on Demio:



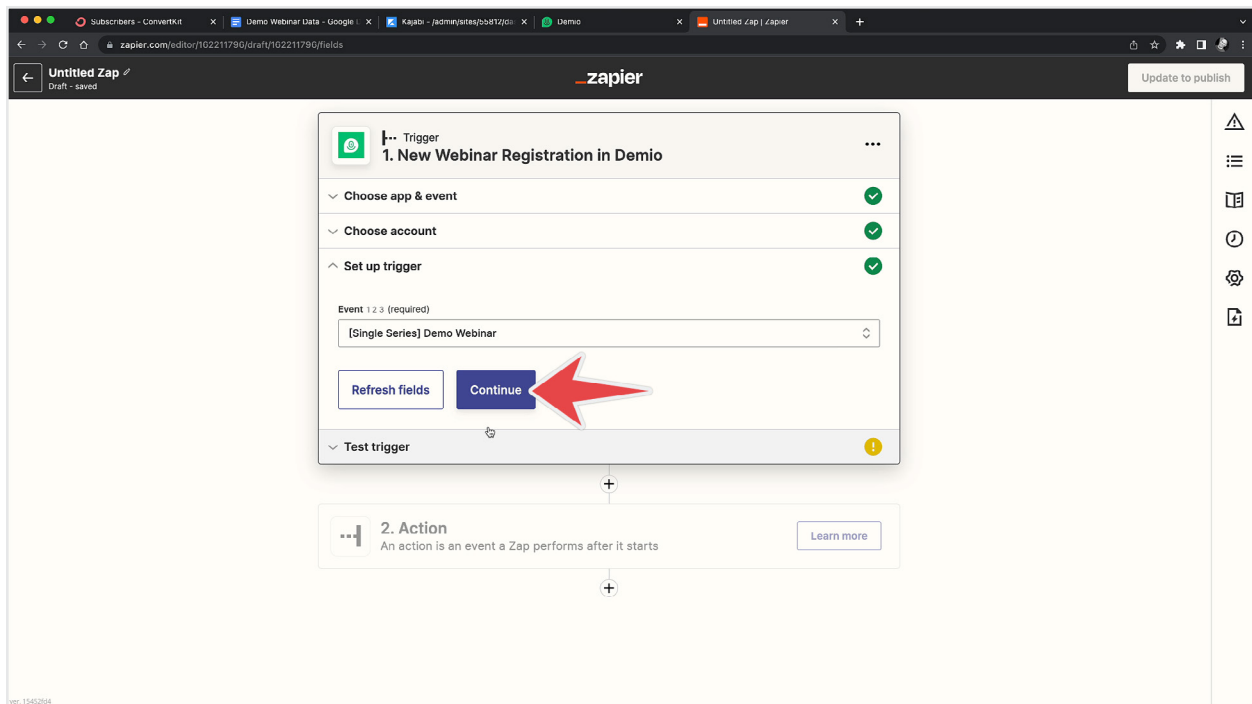
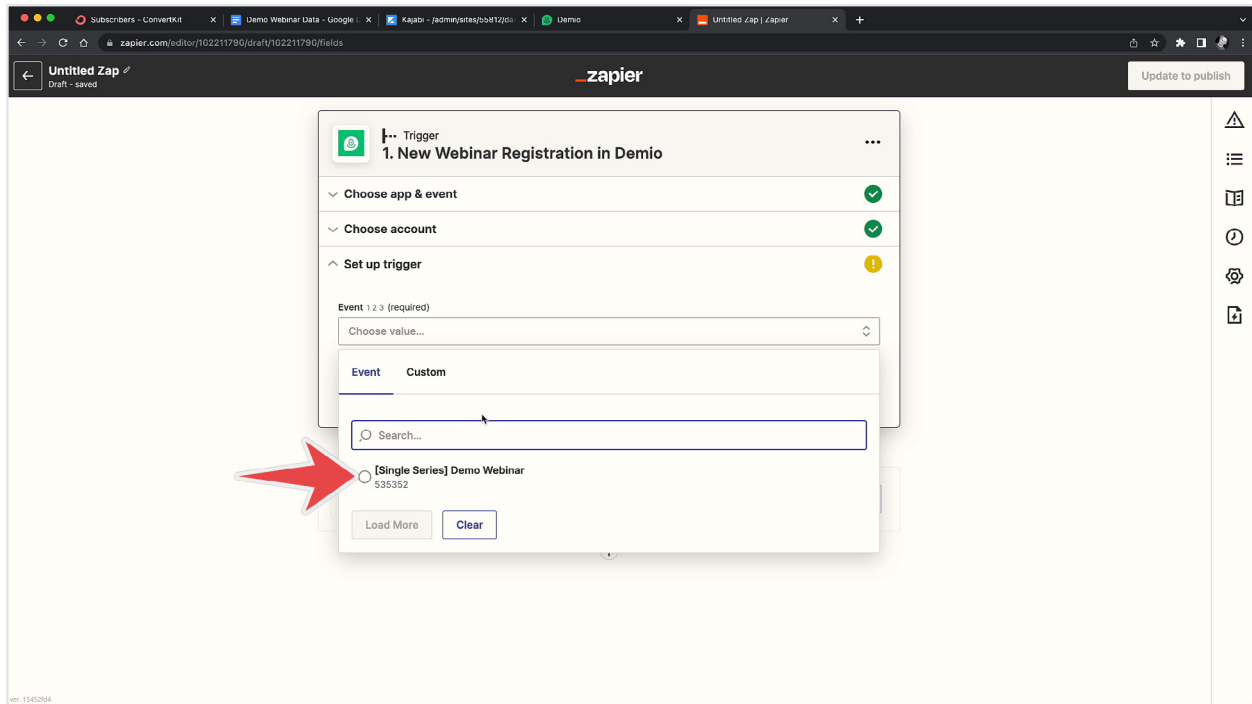
Then you need to choose an event. Click on the dialogue and select **New Webinar Registration**, then click on **Continue**:



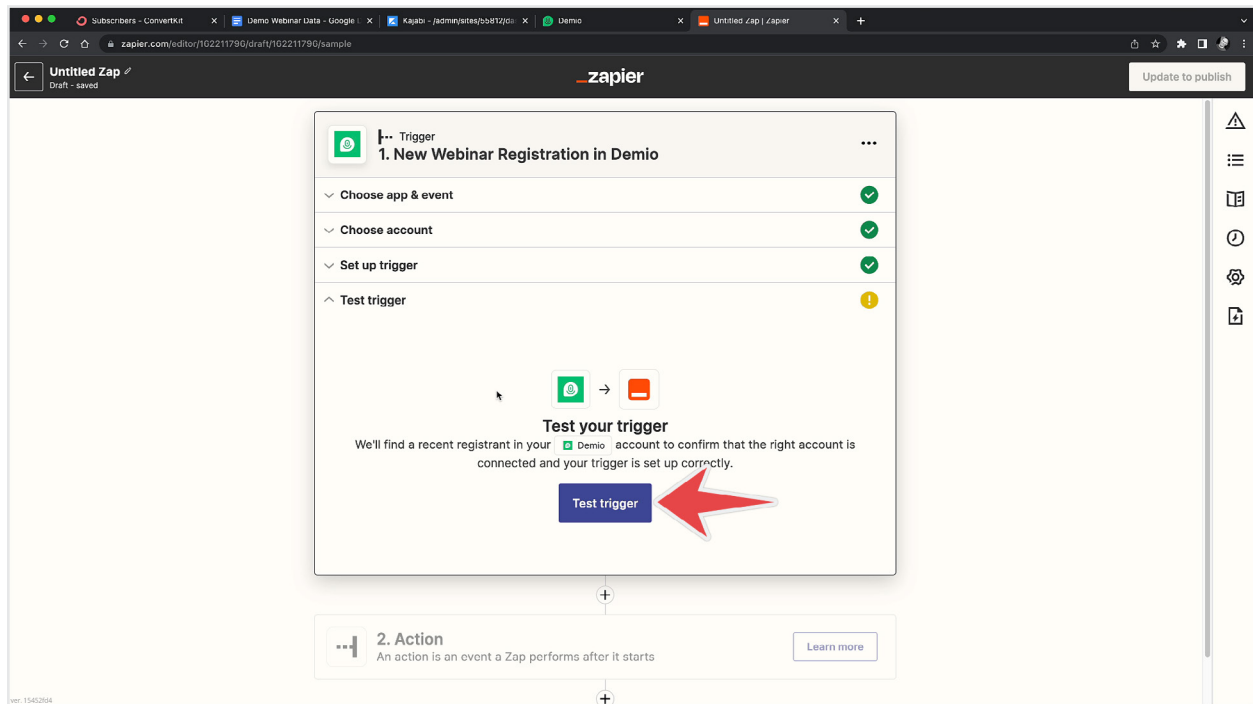
After that, you need to select your account in Demio. Choose your account and click on **Continue**:



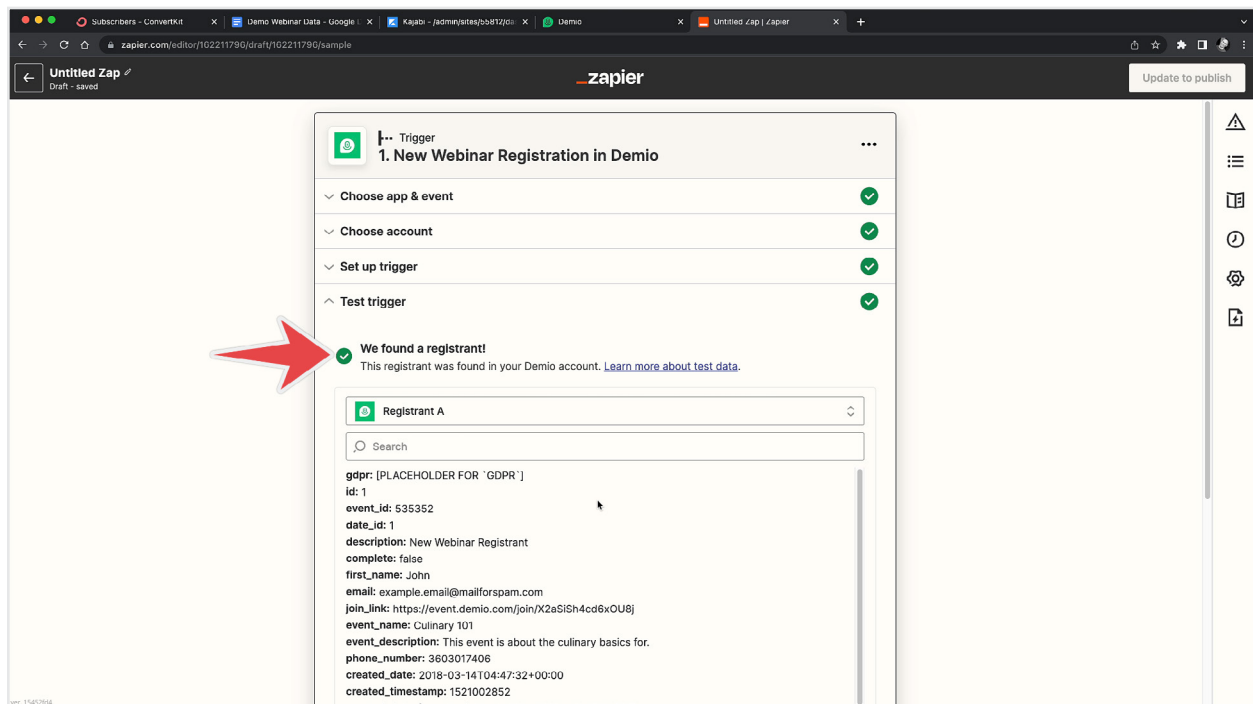
You'll be asked to select your webinar event in Demio, select it and click **Continue**:



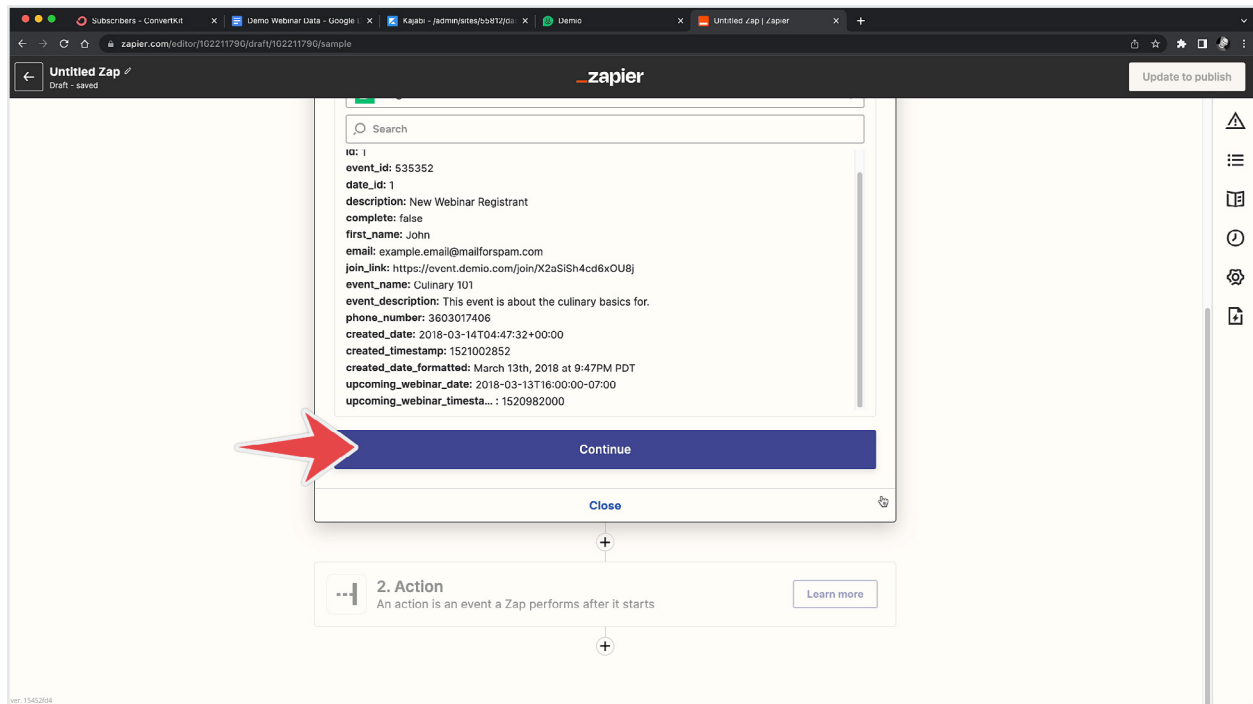
Next, you'll be asked to perform a test. Click on **Test Trigger**:



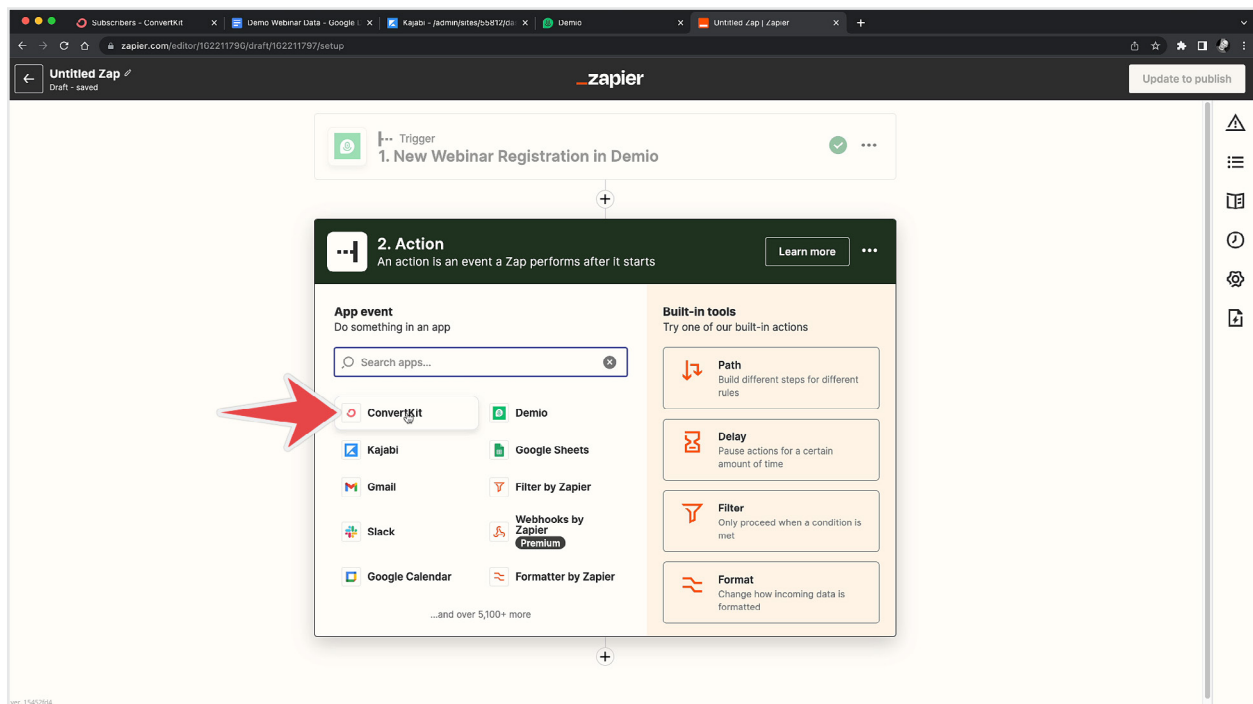
You'll see a green check mark indicating that everything works:



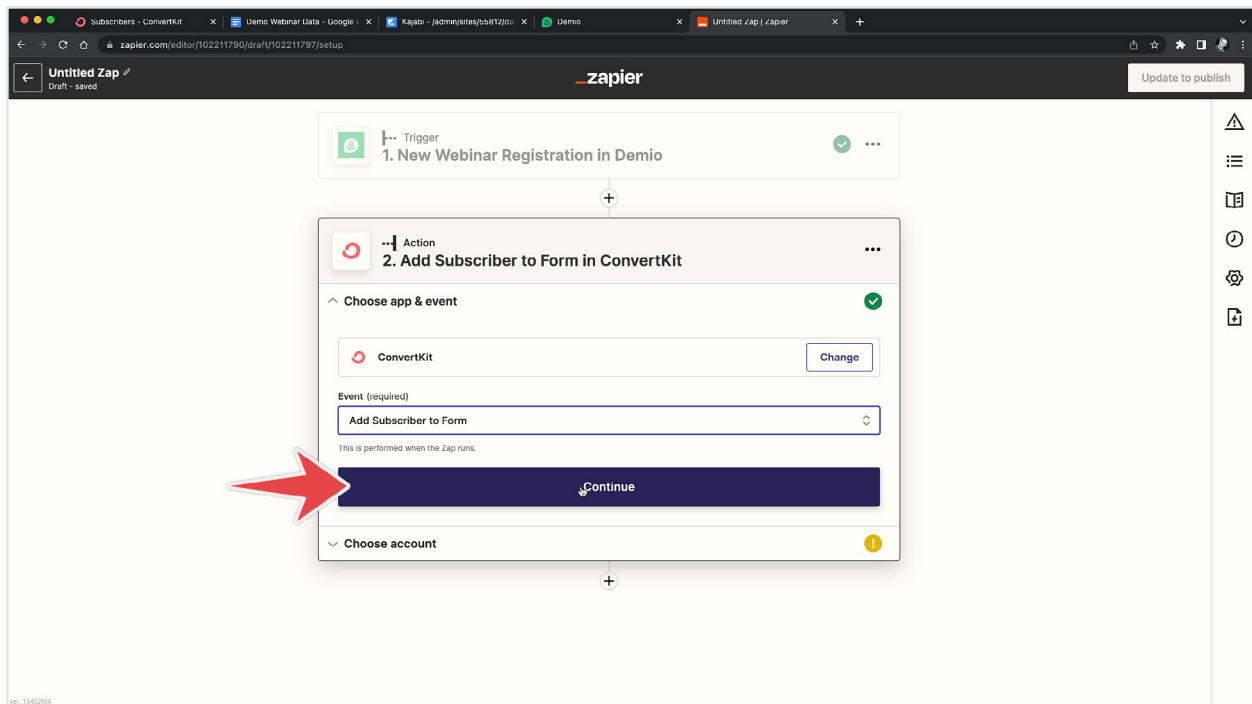
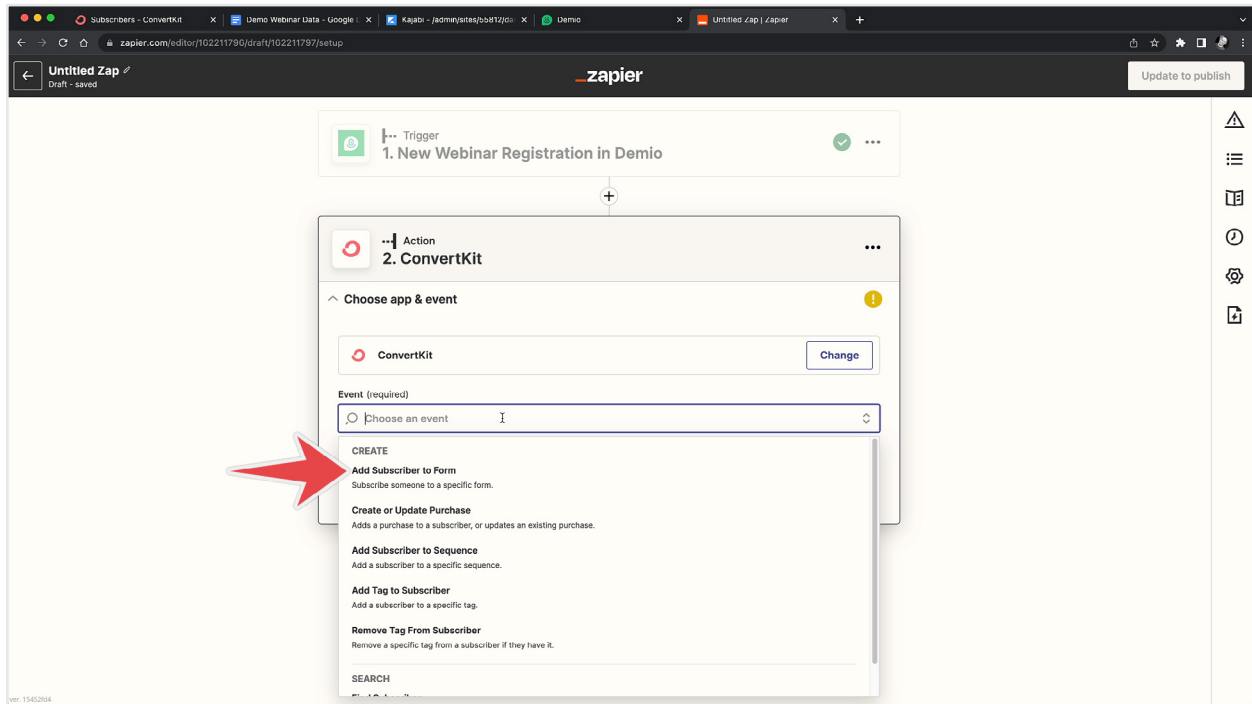
Scroll down and click on **Continue**:



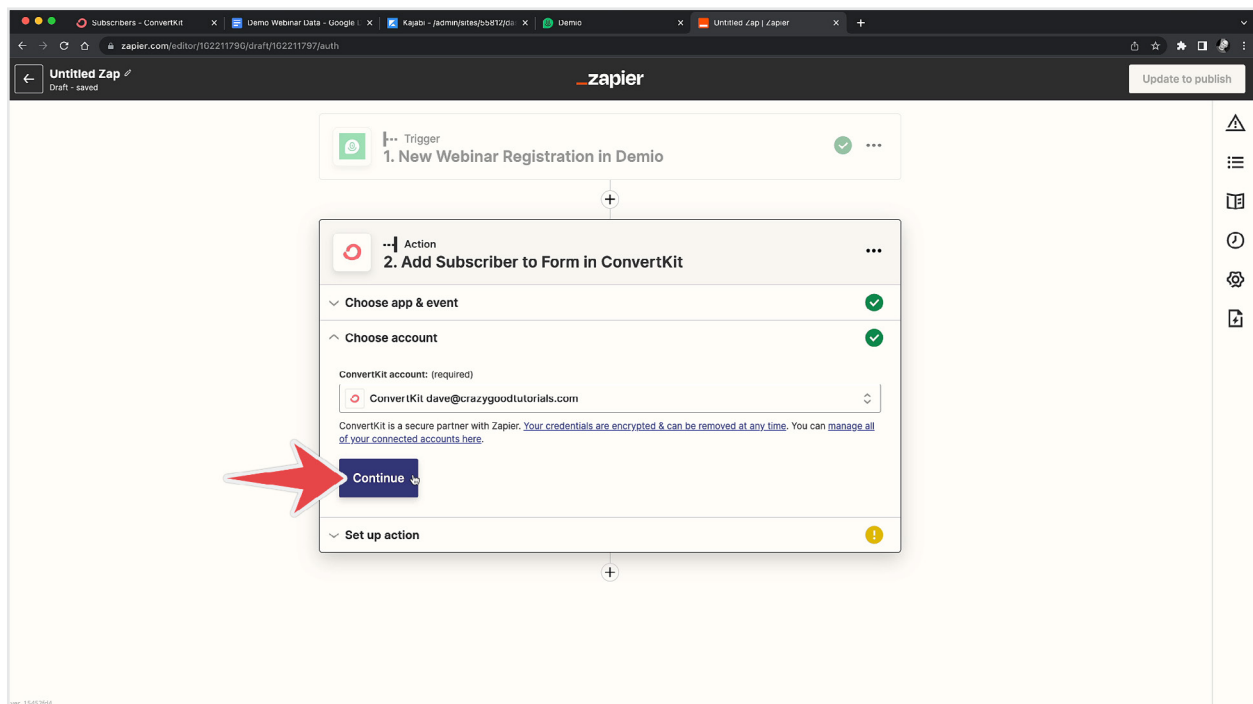
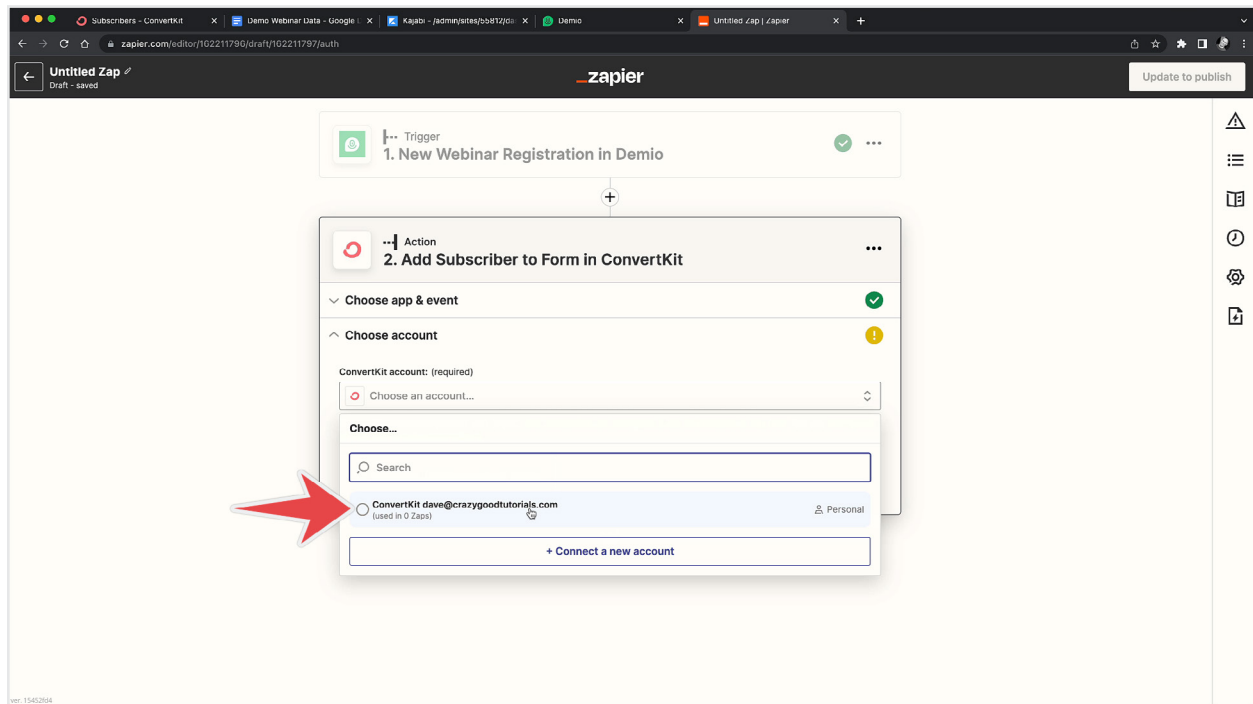
Now you need to select the app for the action event, which is going to be ConvertKit. So select ConvertKit from the list:



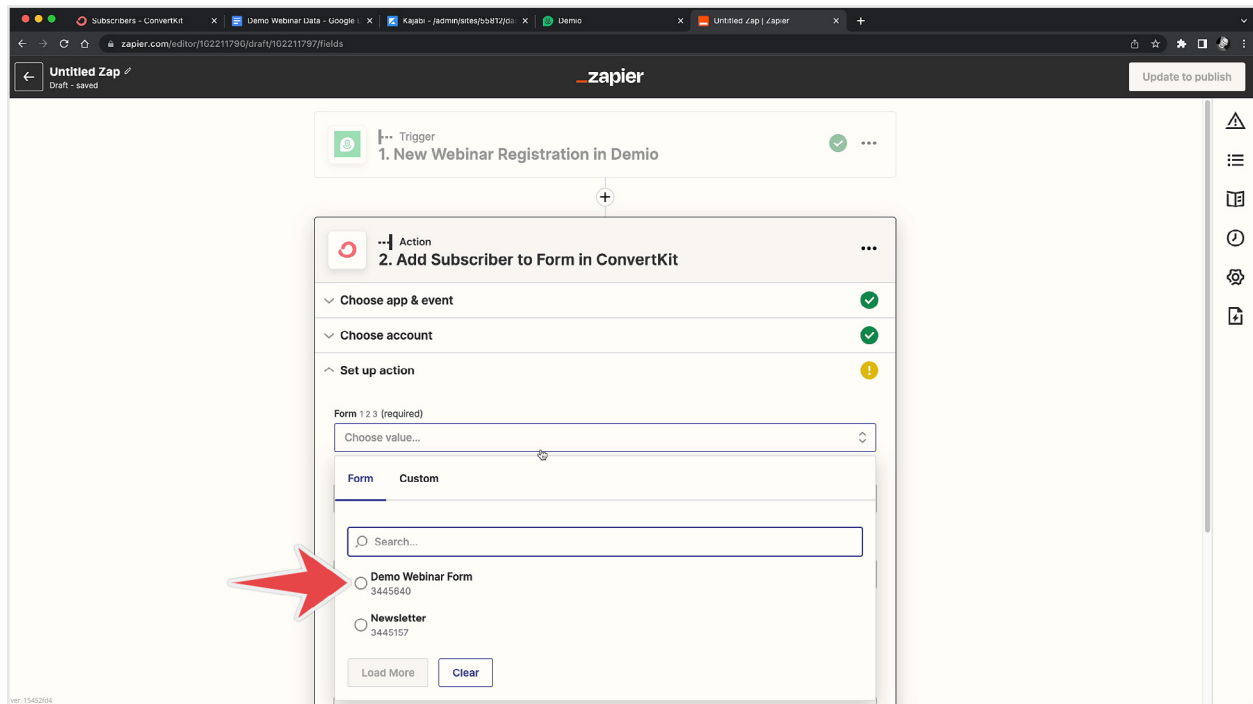
You'll be asked to choose an event. Select **Add Subscriber To Form** and then click **Continue**:



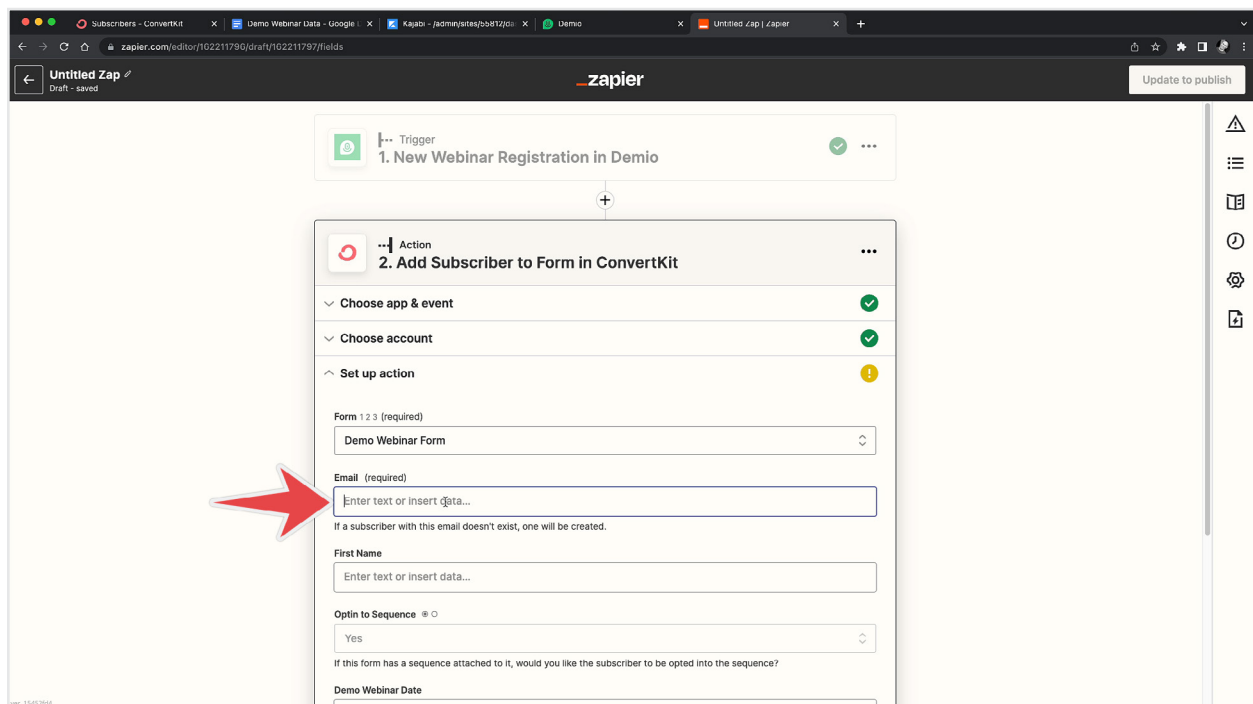
Next, select your ConvertKit account and click **Continue**:

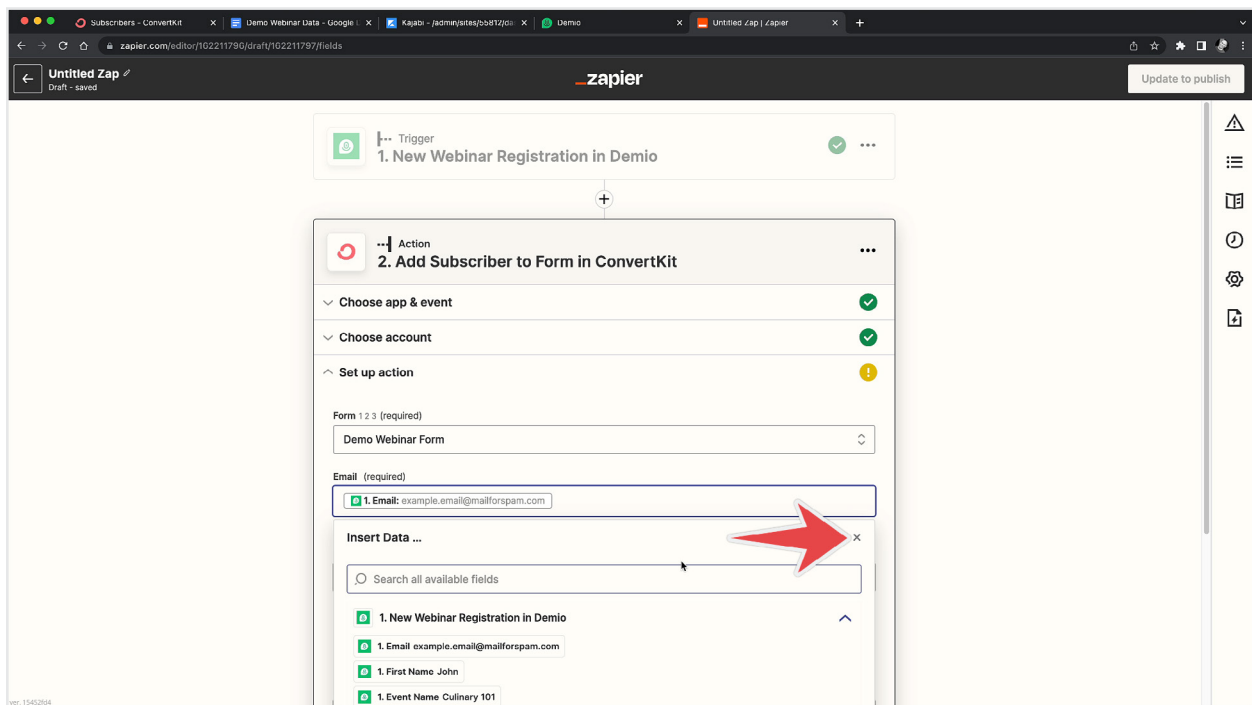
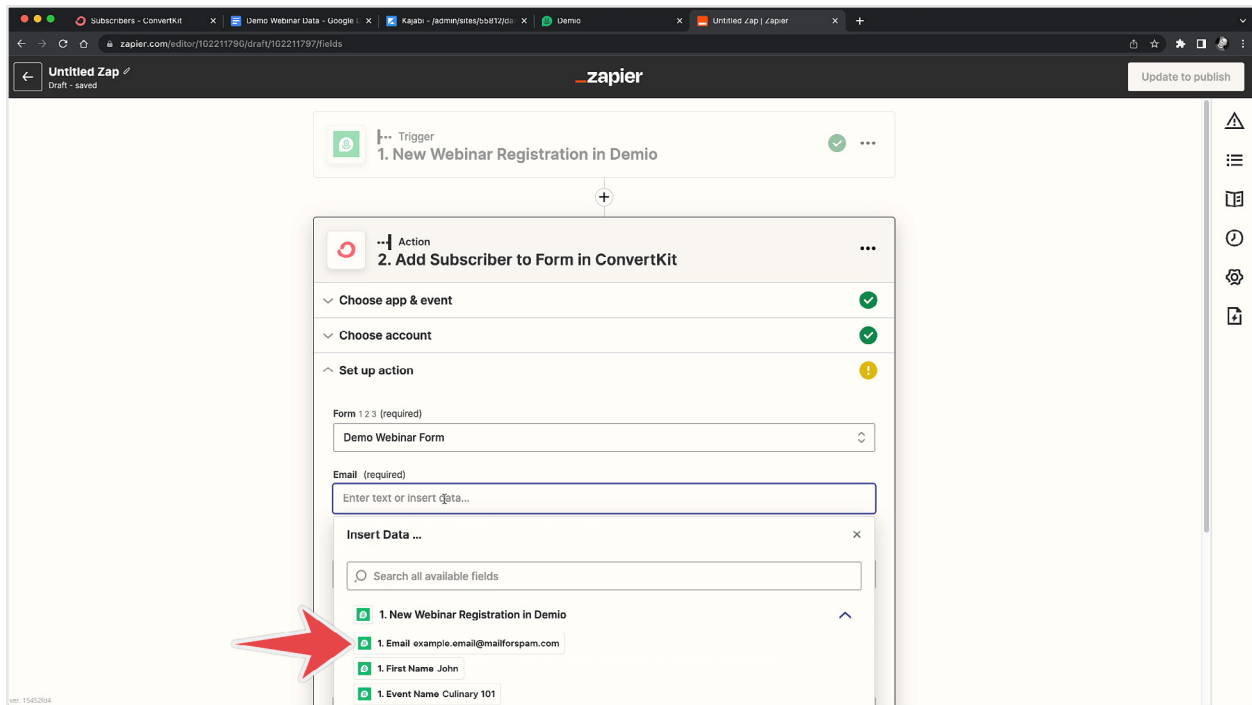


Next, choose your form that you created in ConvertKit:



And now you need to map some data between Demio and ConvertKit. First, you need to map the **email** fields. So click on the email dialog, select the email field from Demio and then click the X to close the dialog::

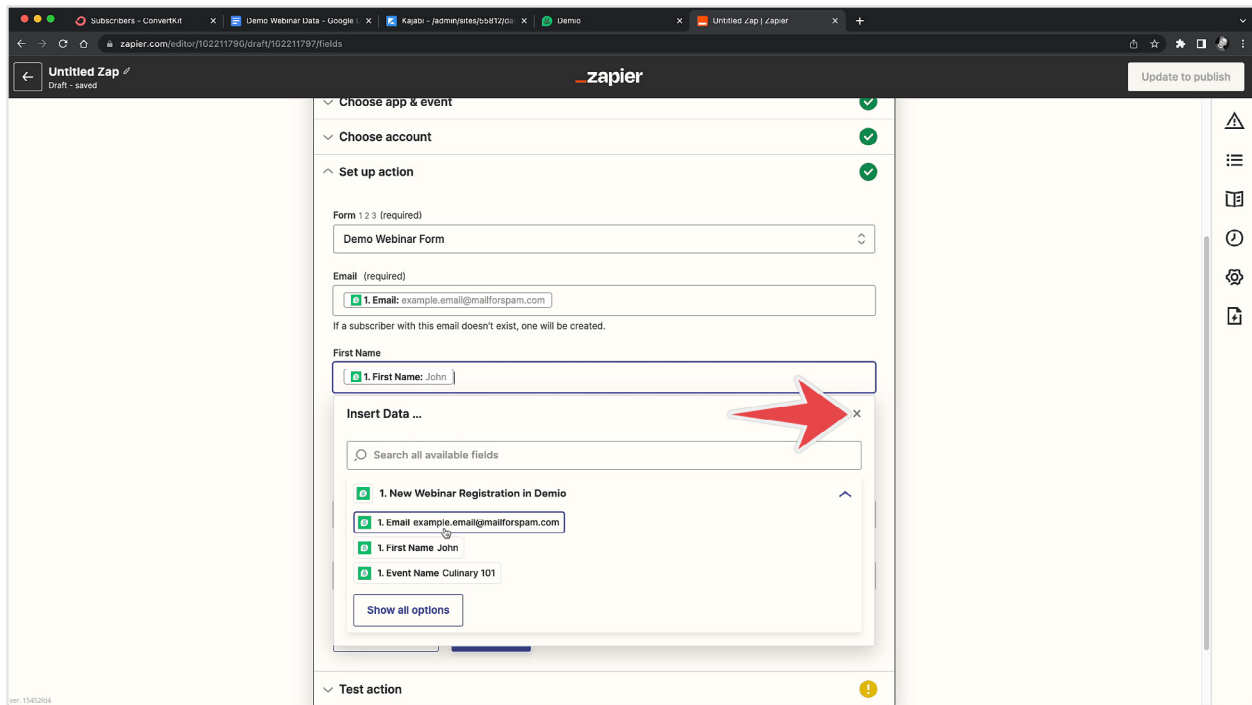




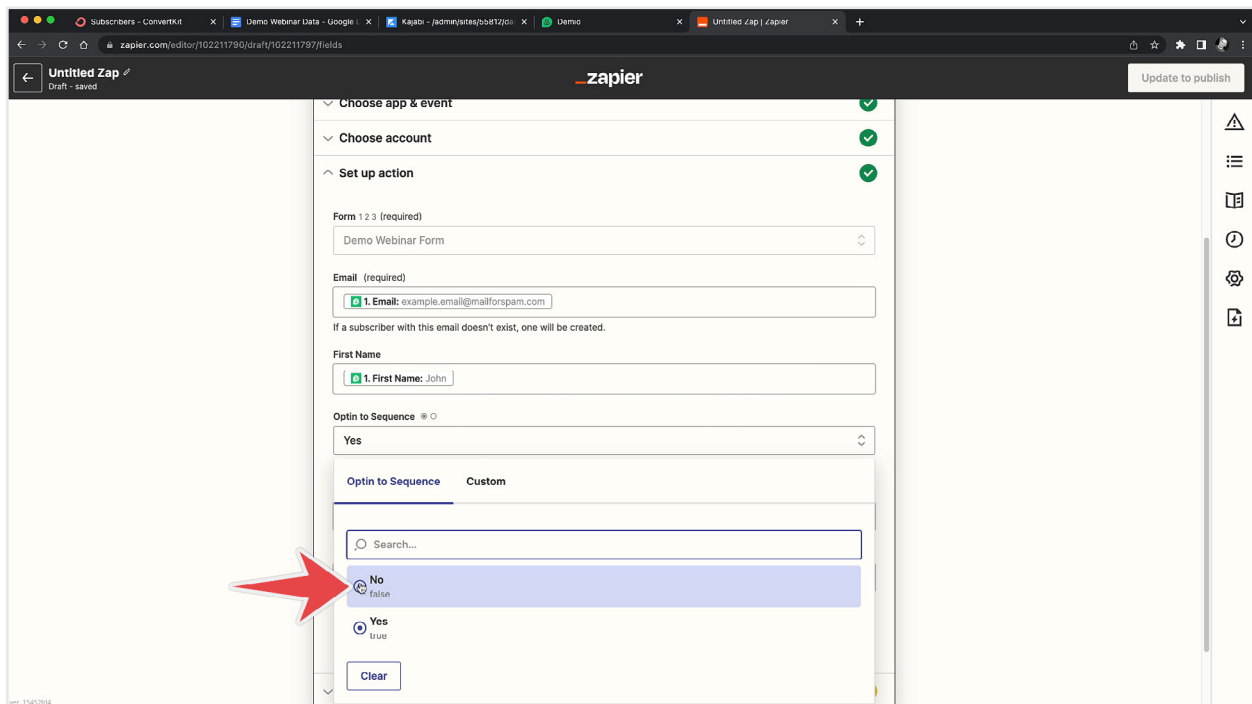
After that, you have to map the **name** fields. Click on the name dialog, select the name field from Demio and click the X to close the dialog:

The screenshot shows the Zapier interface for setting up an action. The 'Set up action' section is expanded, showing the 'Form 1.2.3 (required)' dropdown set to 'Demo Webinar Form'. Below this, the 'Email (required)' field is populated with '1. Email: example.email@mailforspam.com'. The 'First Name' field is currently empty, with a placeholder 'Enter text or insert data...'. A red arrow points to this field. Below the 'First Name' field is the 'Opt in to Sequence' section, which is set to 'Yes'. The 'Demo Webinar Date' and 'Demo Webinar Join Link' fields are also empty. At the bottom of the 'Set up action' section are 'Refresh fields' and 'Continue' buttons. The 'Test action' section is partially visible at the bottom.

This screenshot shows the same Zapier interface as the previous one, but with the 'Insert Data' dialog box open. The dialog has a search bar 'Search all available fields' and a list of options. The options are: '1. New Webinar Registration in Demio', '1. Email example.email@mailforspam.com', '1. First Name John', and '1. Event Name Culinary 101'. A red arrow points to the '1. First Name John' option. There is a 'Show all options' button at the bottom of the list. The 'First Name' field in the background is still empty.



For **Optin to Sequence**, select **No**:

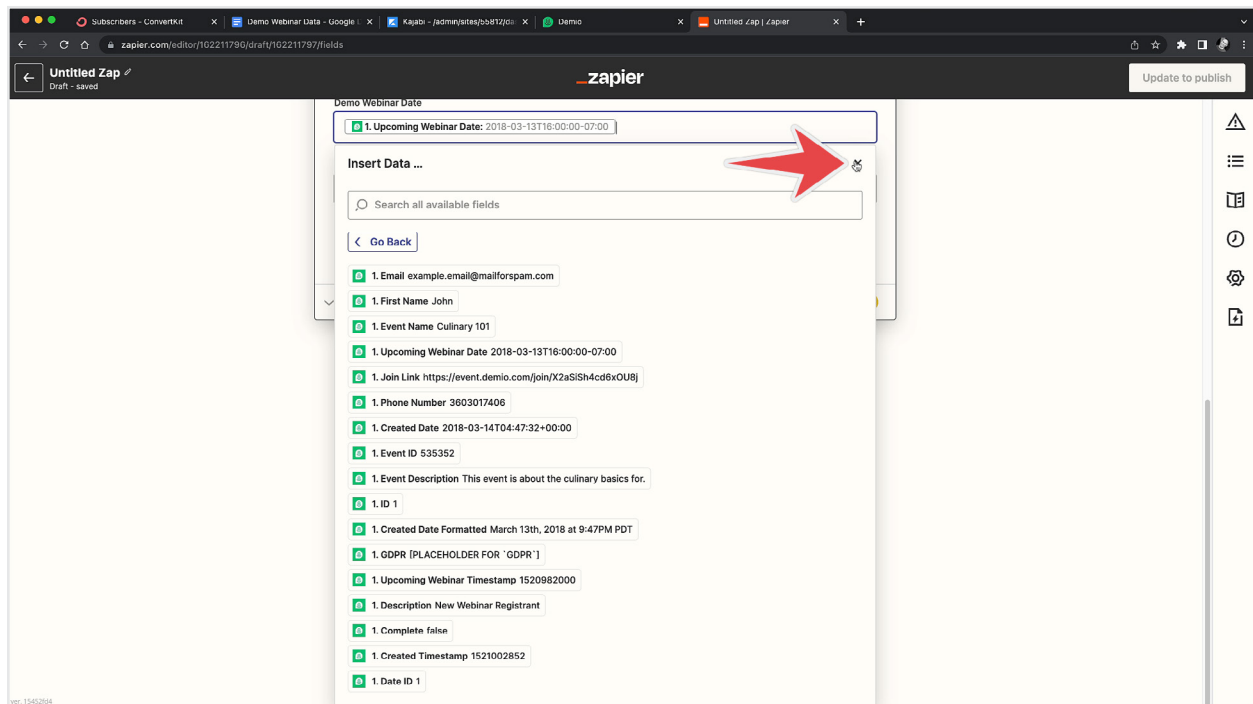
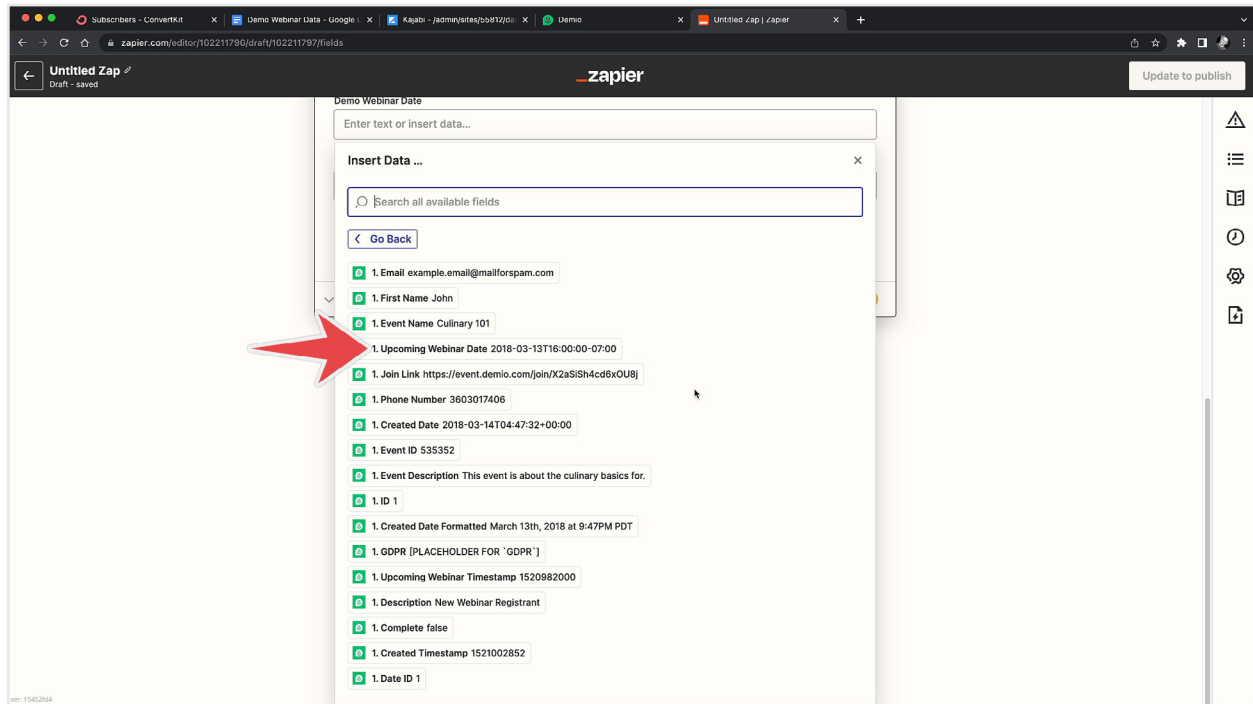


For the webinar date, click on the dialog and then click on the **Show All Options** button:

The screenshot shows the Zapier interface for setting up a new Zap. The 'Set up action' section is expanded, showing a 'Form 1.2.3 (required)' trigger. The 'Email' field is set to '1. Email: example.email@mailforspam.com'. The 'First Name' field is set to '1. First Name: John'. The 'Optin to Sequence' dropdown is set to 'No'. The 'Demo Webinar Date' field is currently empty, and a red arrow points to it. Below this field is the 'Demo Webinar Join Link' field, also empty. At the bottom of the 'Set up action' section are 'Refresh fields' and 'Continue' buttons. The 'Test action' section is partially visible at the bottom.

This screenshot shows the same Zapier interface, but with the 'Demo Webinar Date' dialog box open. The dialog box has a search bar 'Search all available fields' and a list of available fields: '1. New Webinar Registration in Demio', '1. Email example.email@mailforspam.com', '1. First Name: John', and '1. Event Name: Culinary 101'. A red arrow points to the 'Show all options' button at the bottom of the dialog box.

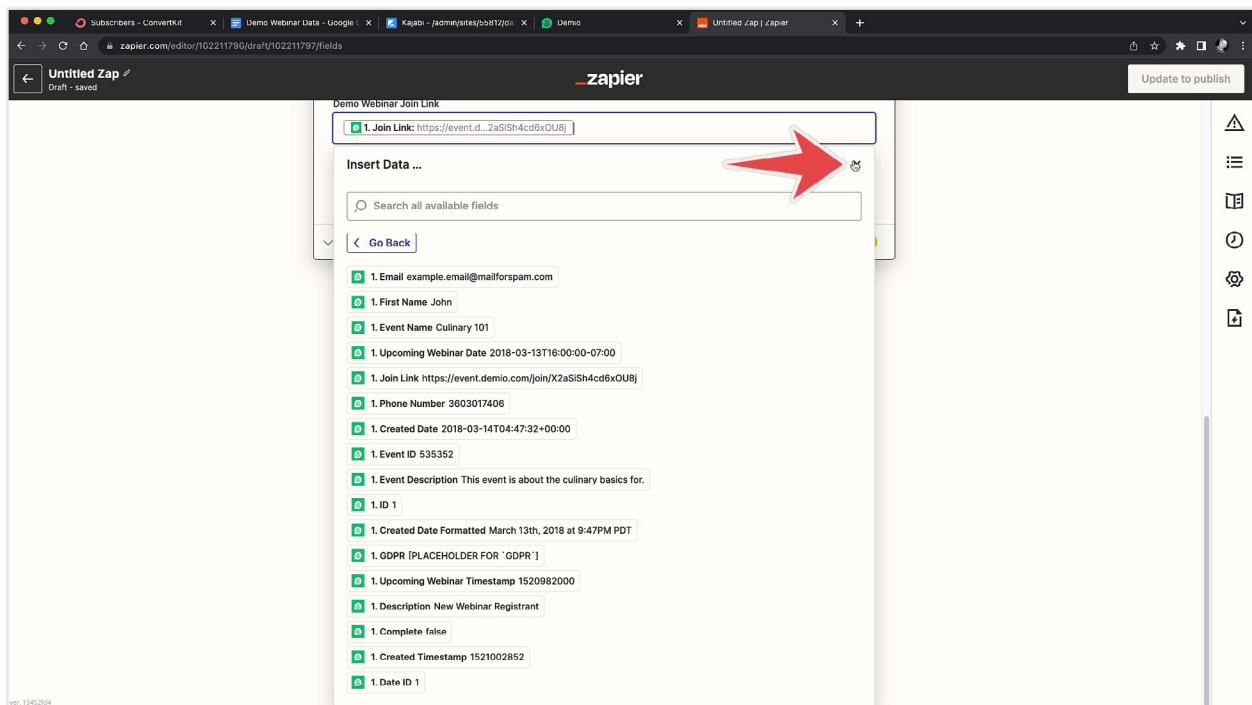
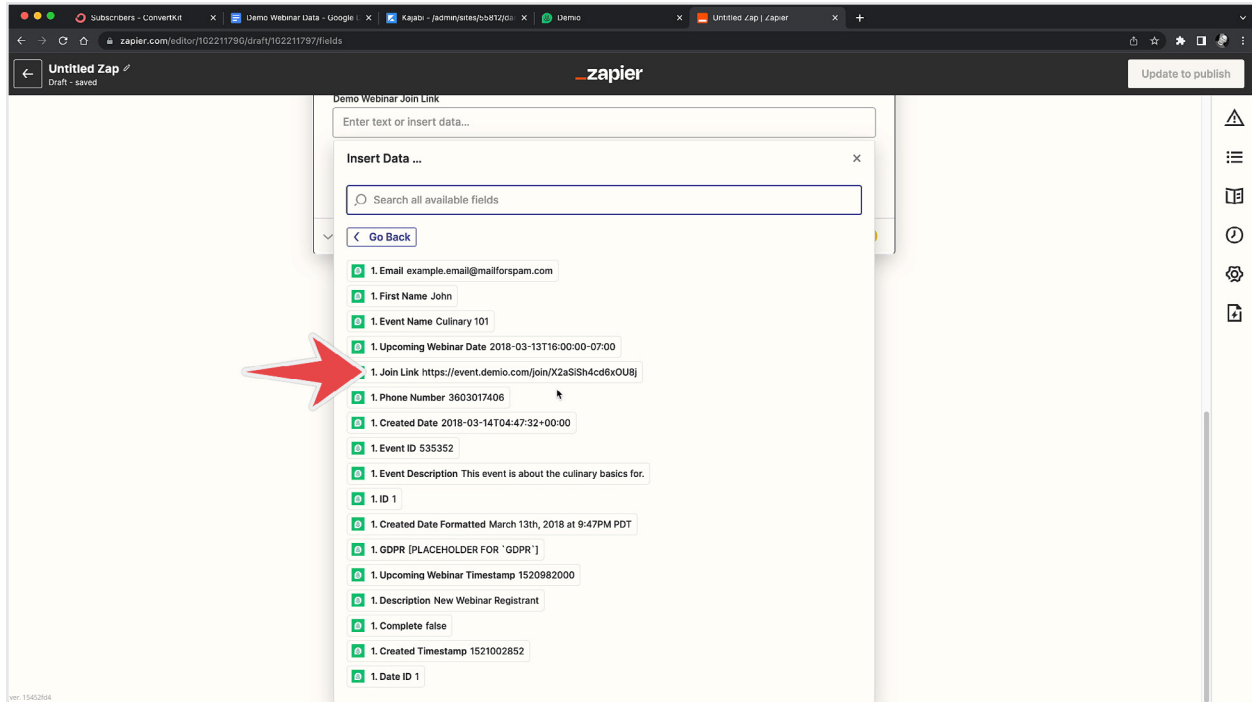
In the list that appears, select the **Upcoming Webinar Date** and then click on the X to close the dialog:



And then finally, you have the webinar join link. So once again, click on the dialogue, click on **Show All Options**, select the **Join Link** and click the **X** to close the dialog:

The screenshot shows the Zapier form editor interface. The form is titled "Demo Webinar Form" and includes several fields: "Email (required)" with a value of "example.email@mailforspam.com", "First Name" with a value of "John", "Optin to Sequence" set to "No", and "Demo Webinar Date" set to "2018-03-13T16:00:00-07:00". The "Demo Webinar Join Link" field is currently empty and is highlighted by a red arrow. Below the form, there are "Refresh fields" and "Continue" buttons. The interface also shows a "Test action" button at the bottom.

This screenshot shows the same Zapier form editor, but with the "Insert Data ..." dialog open. The dialog lists available fields for insertion into the "Demo Webinar Join Link" field. The fields listed are: "1. New Webinar Registration in Demio", "1. Email example.email@mailforspam.com", "1. First Name John", and "1. Event Name Culinary 101". A red arrow points to the "Show all options" button at the bottom of the dialog. The "Demo Webinar Join Link" field in the background is now highlighted with a blue border.



Then click on **Continue**:

The screenshot shows the Zapier interface for configuring a form. The form is titled 'Form 1,2,3 (required)' and is named 'Demo Webinar Form'. It includes the following fields:

- Email (required):** 1. Email: example.email@mailforspam.com. A note states: 'If a subscriber with this email doesn't exist, one will be created.'
- First Name:** 1. First Name: John
- Optin to Sequence:** No. A note states: 'If this form has a sequence attached to it, would you like the subscriber to be opted into the sequence?'
- Demo Webinar Date:** 1. Upcoming Webinar Date: 2018-03-13T16:00:00-07:00
- Demo Webinar Join Link:** 1. Join Link: https://event.d...2aSiSH4cd6xOU8j

At the bottom of the form configuration, there are two buttons: 'Refresh fields' and 'Continue'. A red arrow points to the 'Continue' button.

Zapier will want to test this connection, but you're actually going to test this yourself in just a little bit. So go over, click on Skip Test, and then confirm that yes, you want to skip the test:

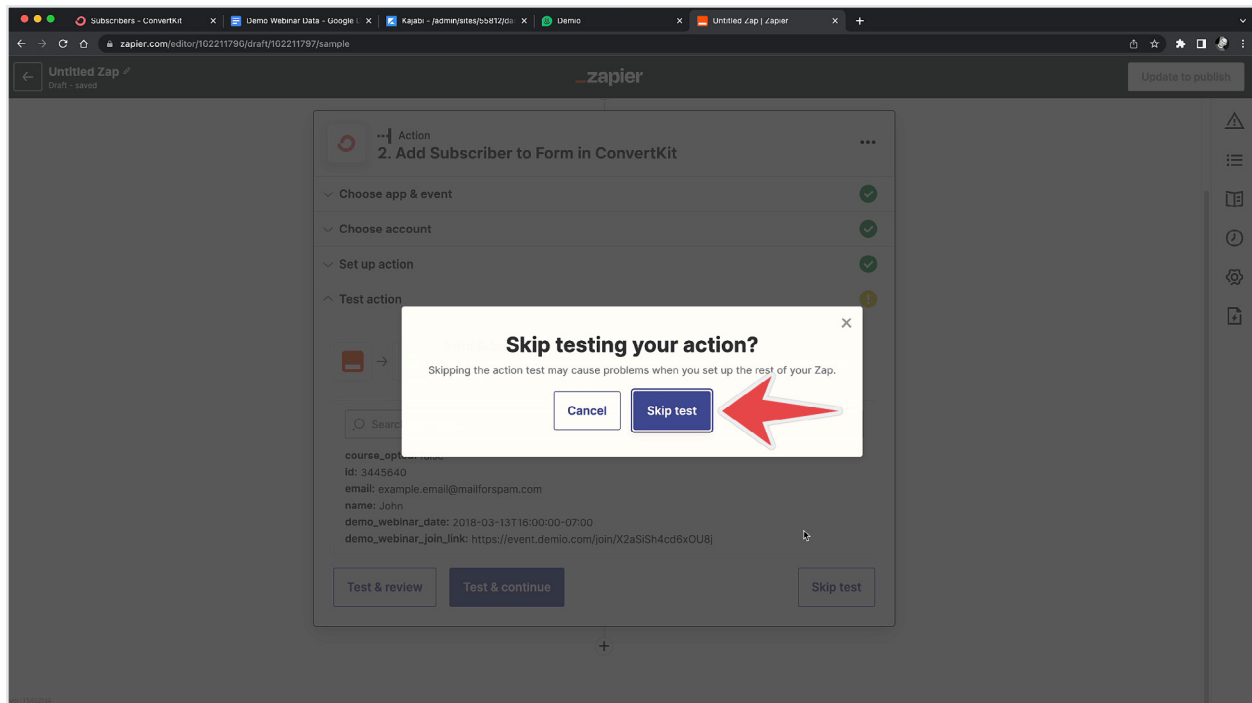
The screenshot shows the 'Test action' step in the Zapier interface. The action is titled '2. Add Subscriber to Form in ConvertKit'. It includes the following sections:

- Choose app & event:** ✓
- Choose account:** ✓
- Set up action:** ✓
- Test action:** ⚠

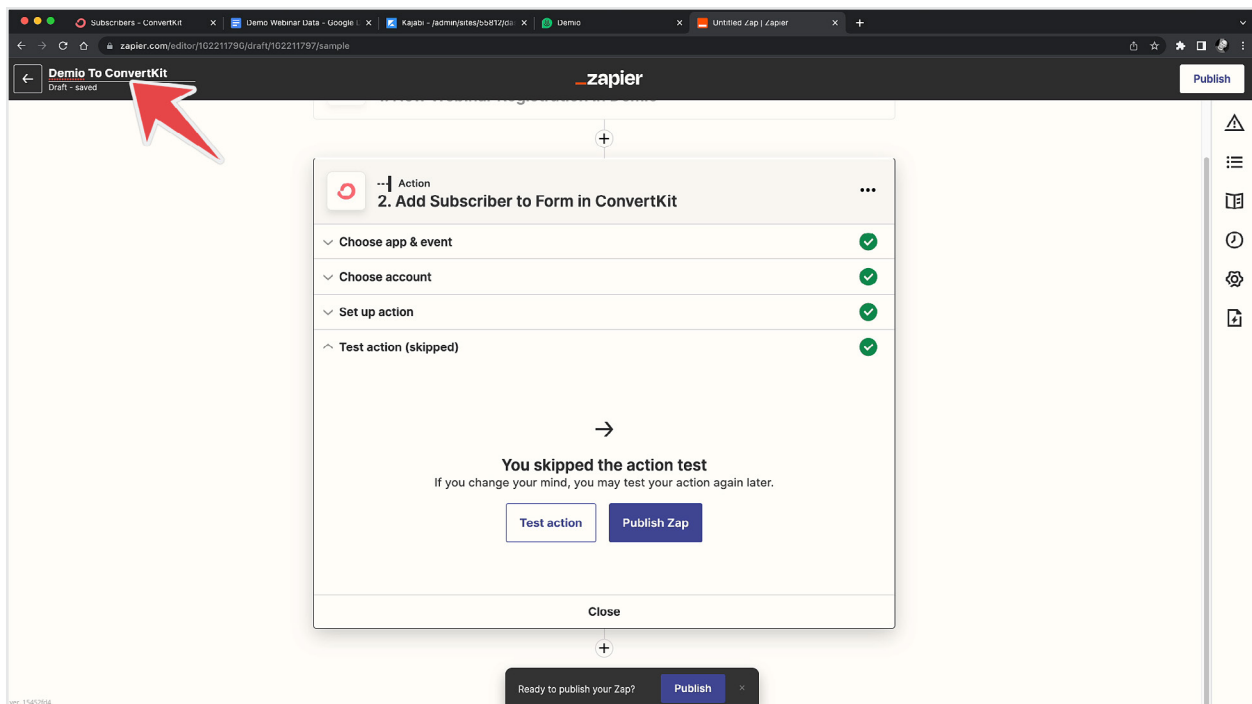
The 'Test action' section shows a list of fields to be tested:

- course_opted: false
- id: 3445640
- email: example.email@mailforspam.com
- name: John
- demo_webinar_date: 2018-03-13T16:00:00-07:00
- demo_webinar_join_link: https://event.d...2aSiSH4cd6xOU8j

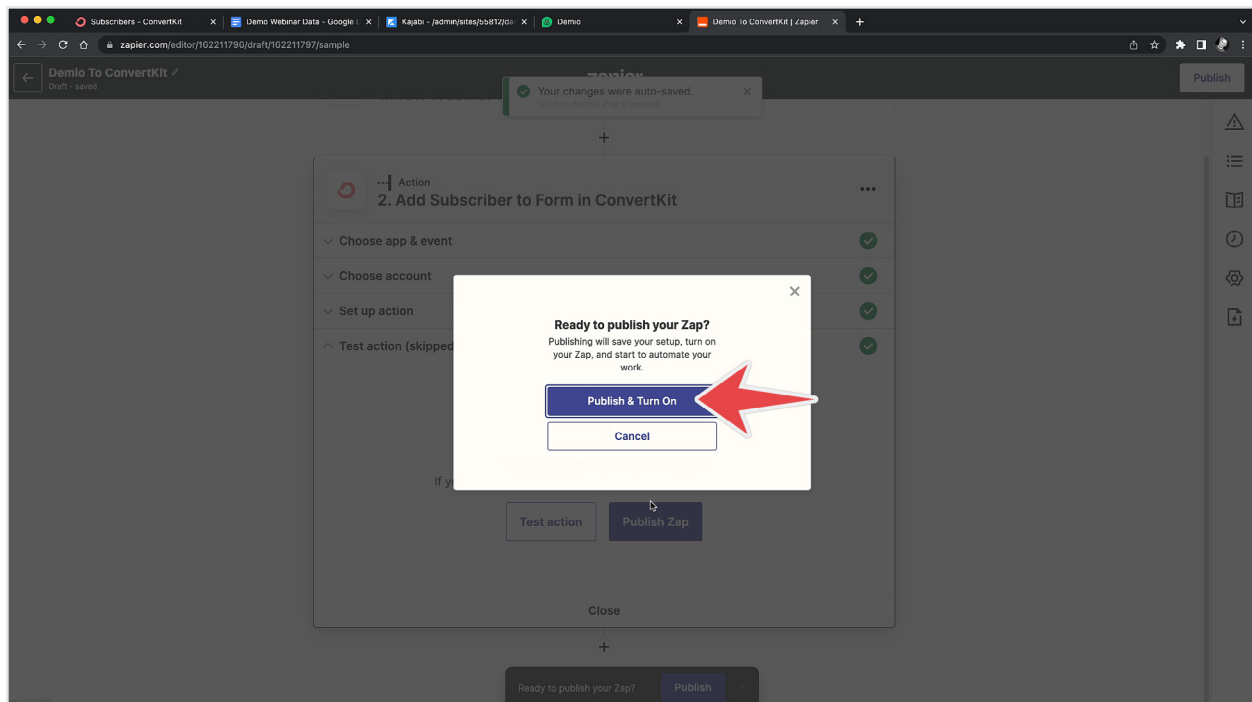
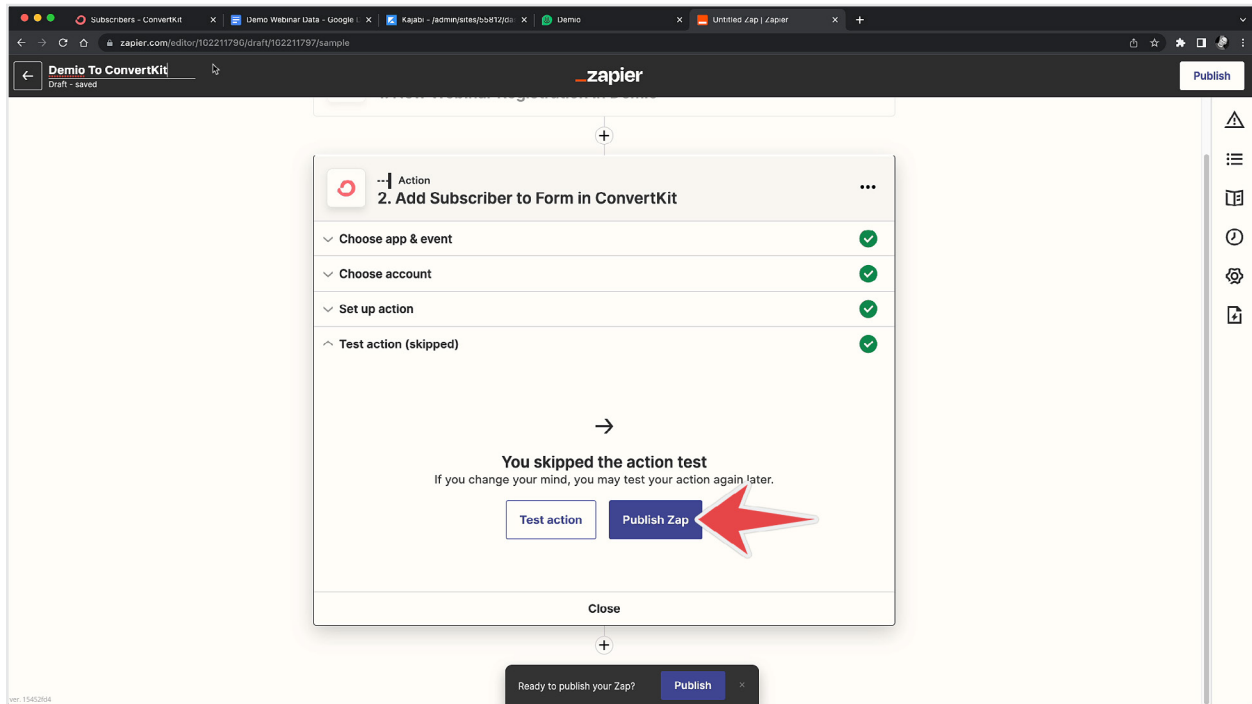
At the bottom of the test action section, there are three buttons: 'Test & review', 'Test & continue', and 'Skip test'. A red arrow points to the 'Skip test' button.



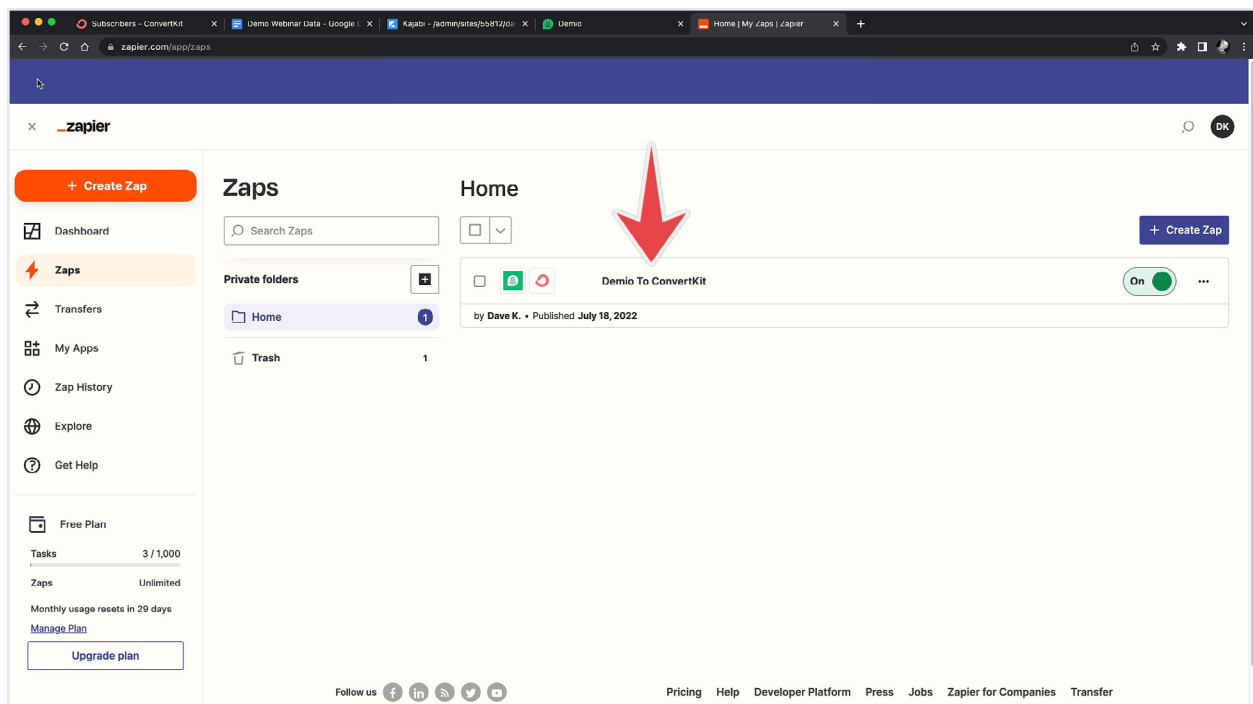
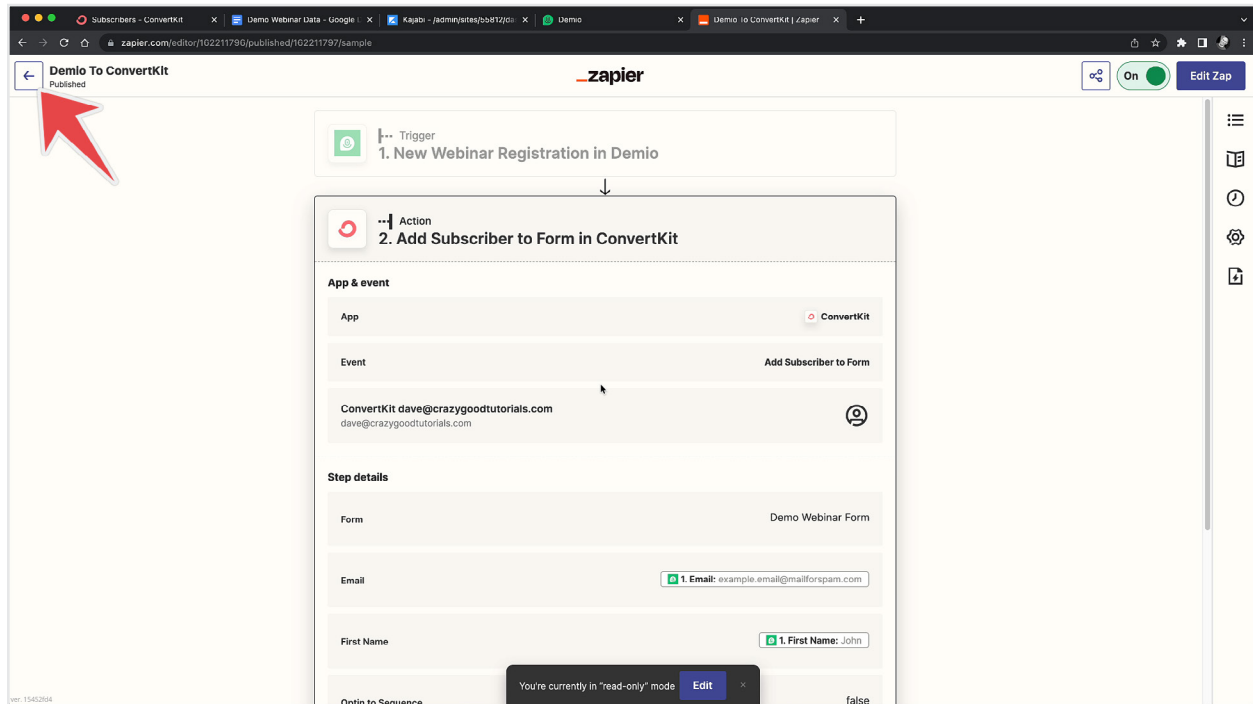
Now you need to name this zap. Go to the upper left hand corner, click on the pencil and give your Zap a name that makes sense to you:



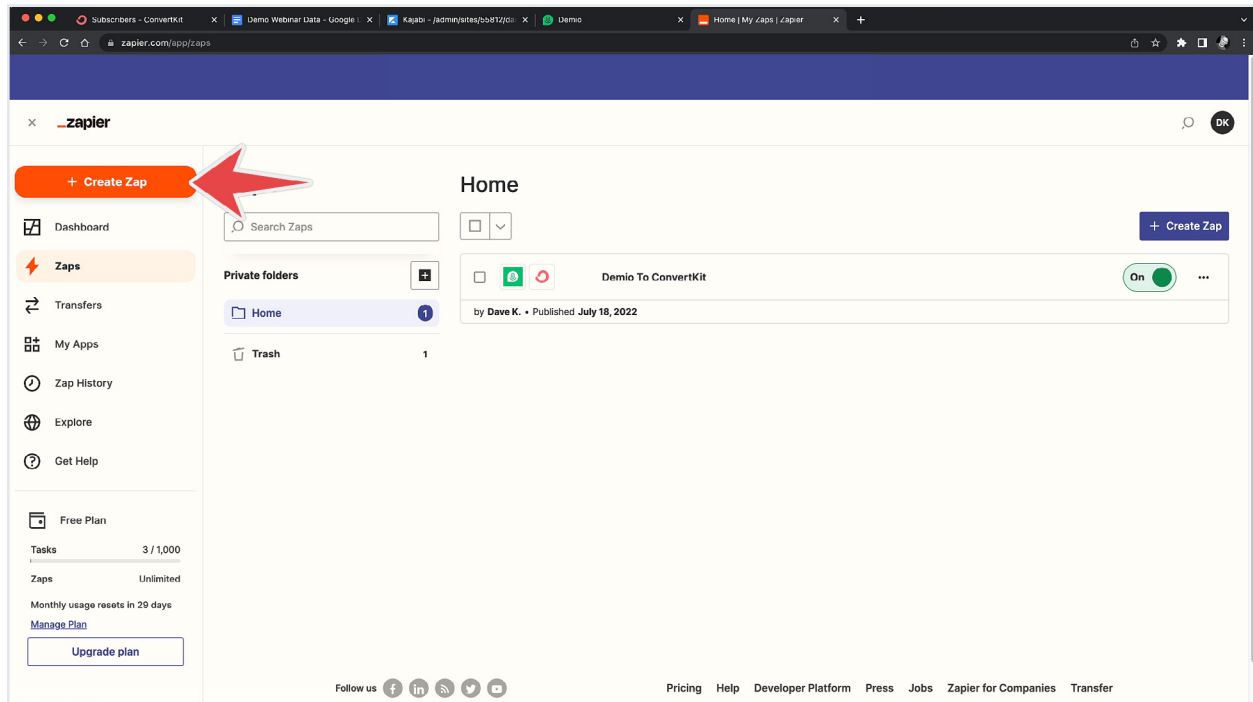
Then click on **Publish Zap** and then confirm that, yes, you want to publish the Zap and turn it on:



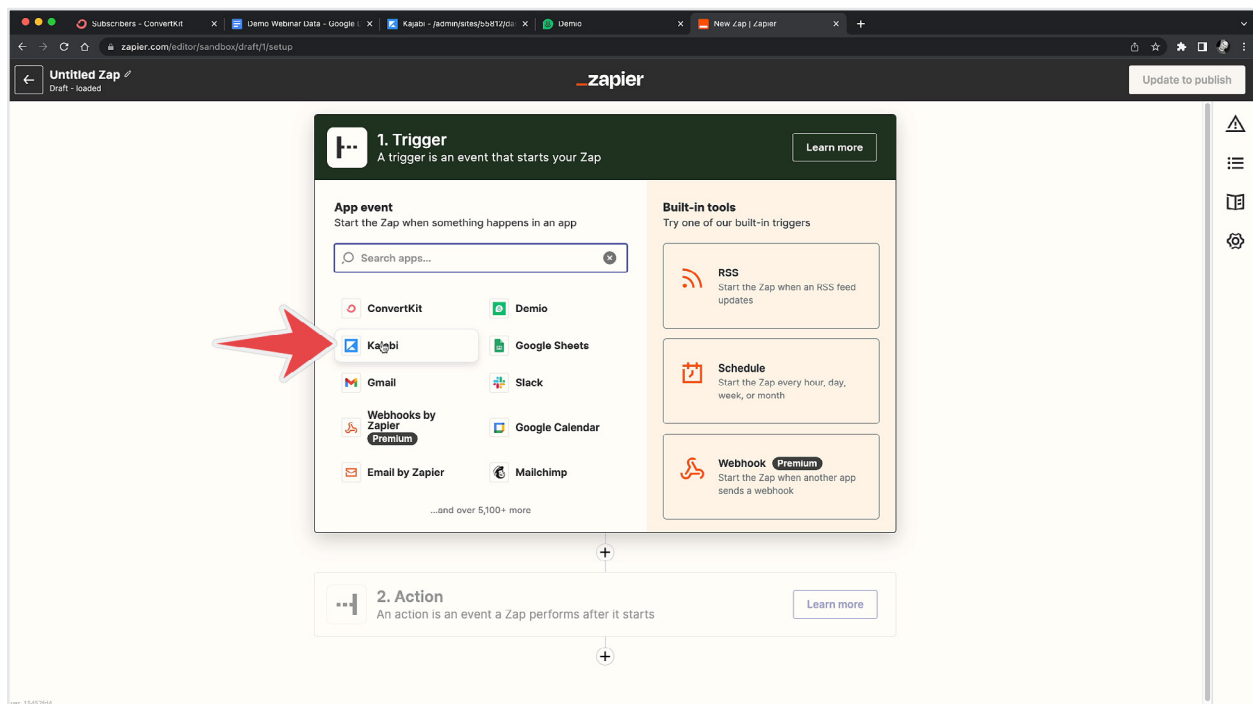
Now go to the upper left hand corner, click on the back arrow, and you can see that the Zap is listed and live:



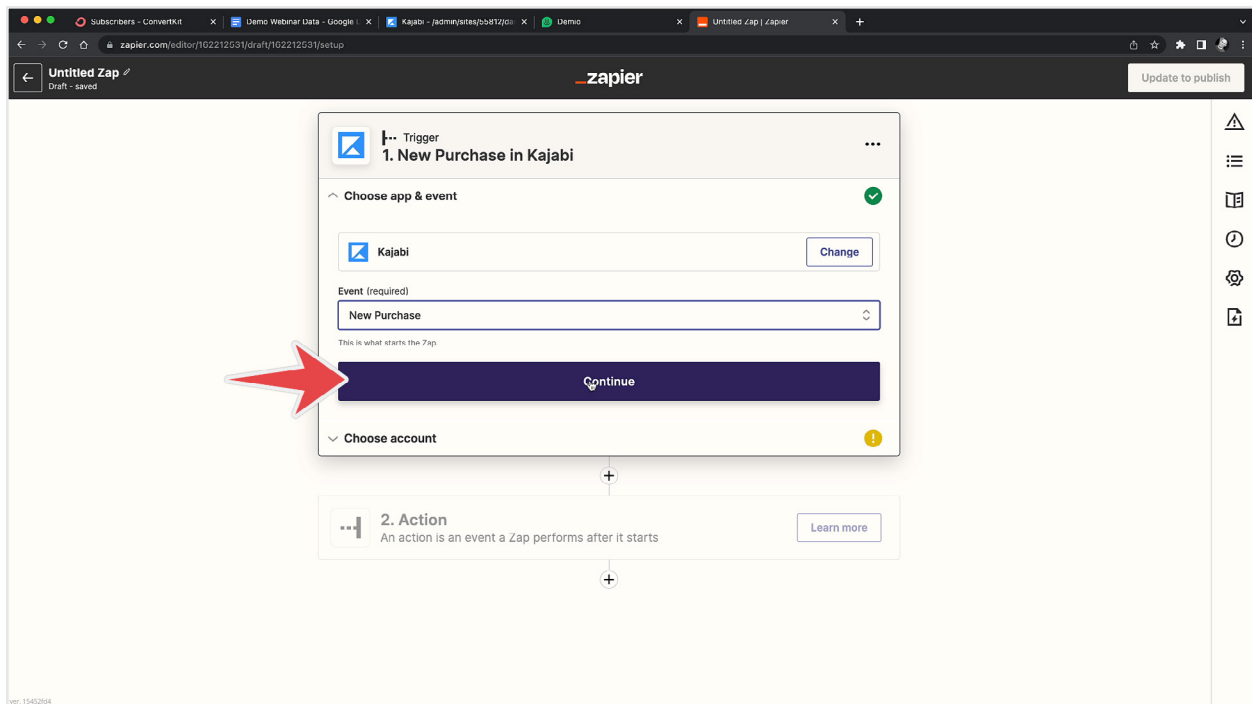
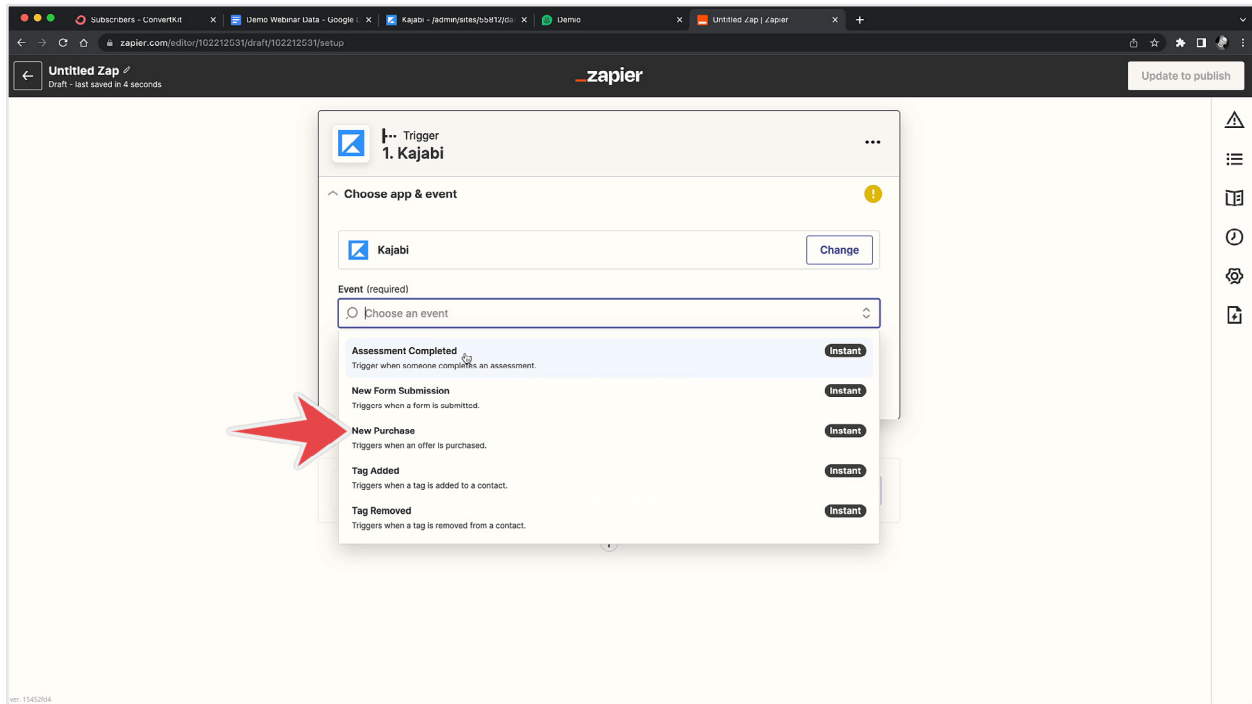
But now you need to create a second Zap. Why is that? You need to create a Zap where when someone purchases your course in Kajabi, ConvertKit will know about it. To do this, go to the panel to the left and click on **Create Zap**:



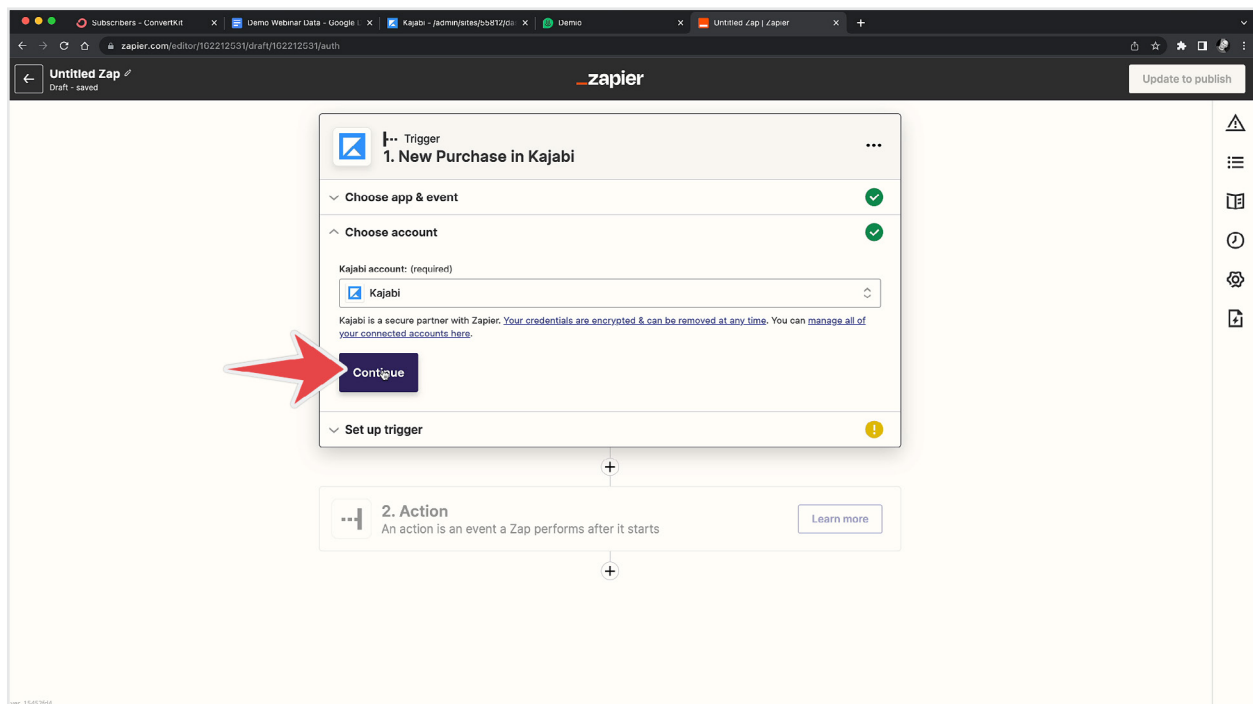
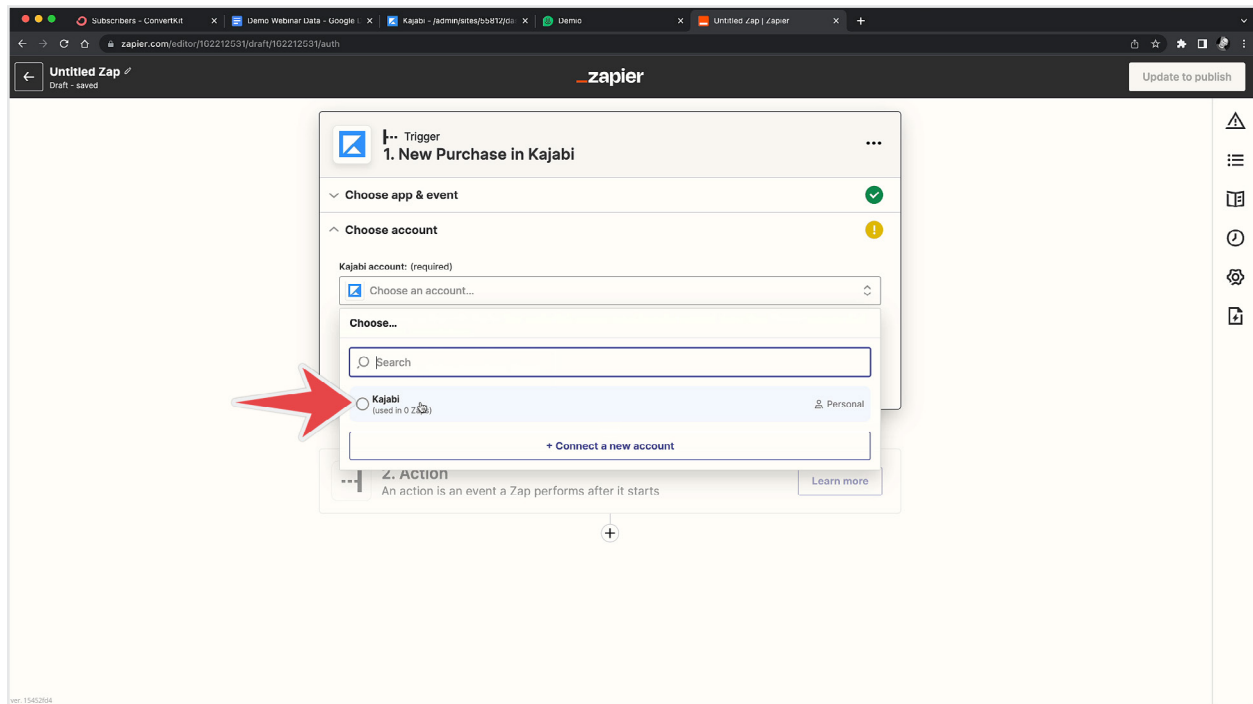
The trigger is going to be a purchase in Kajabi. So select **Kajabi**:



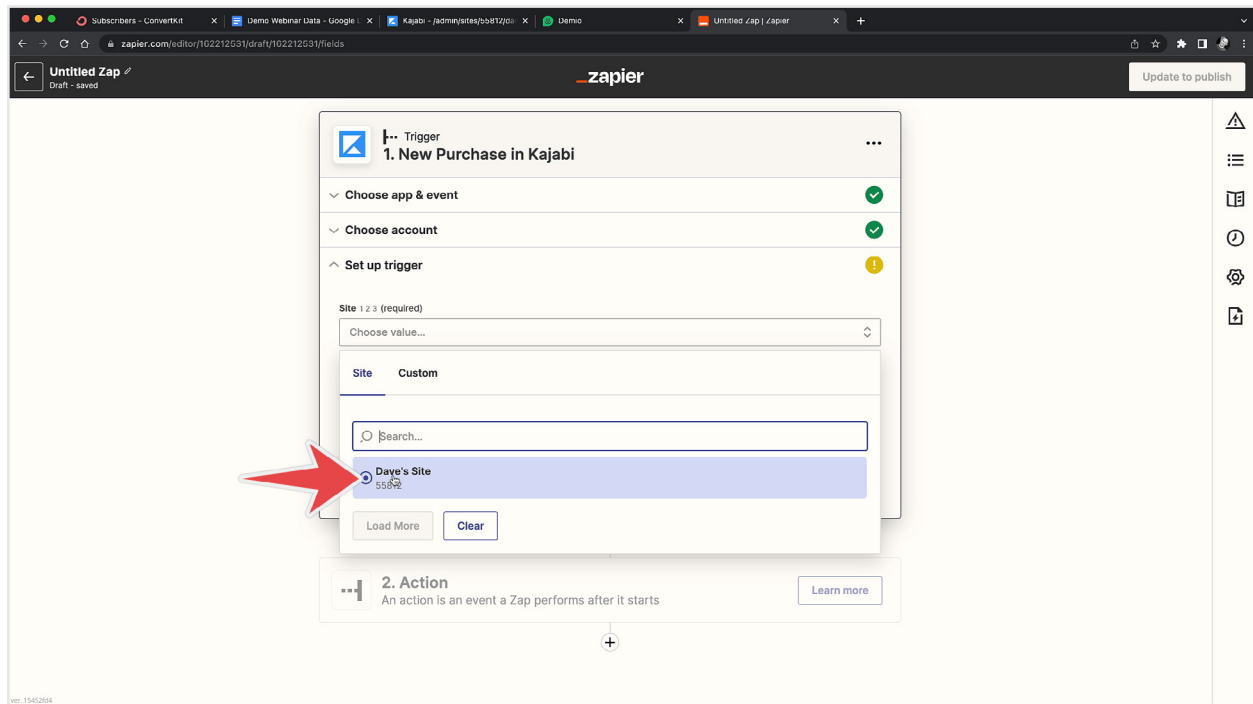
Click on the event dropdown, then select **New Purchase** and click on **Continue**:



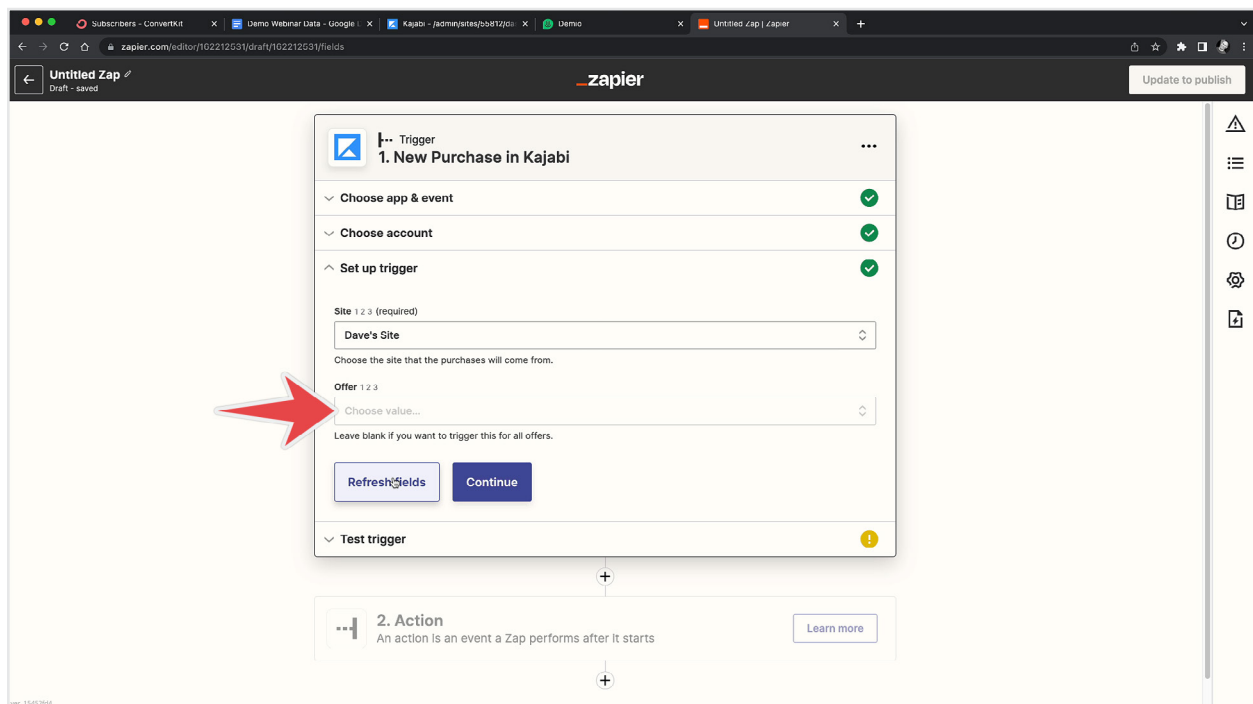
Select your Kajabi account and click on **Continue**:

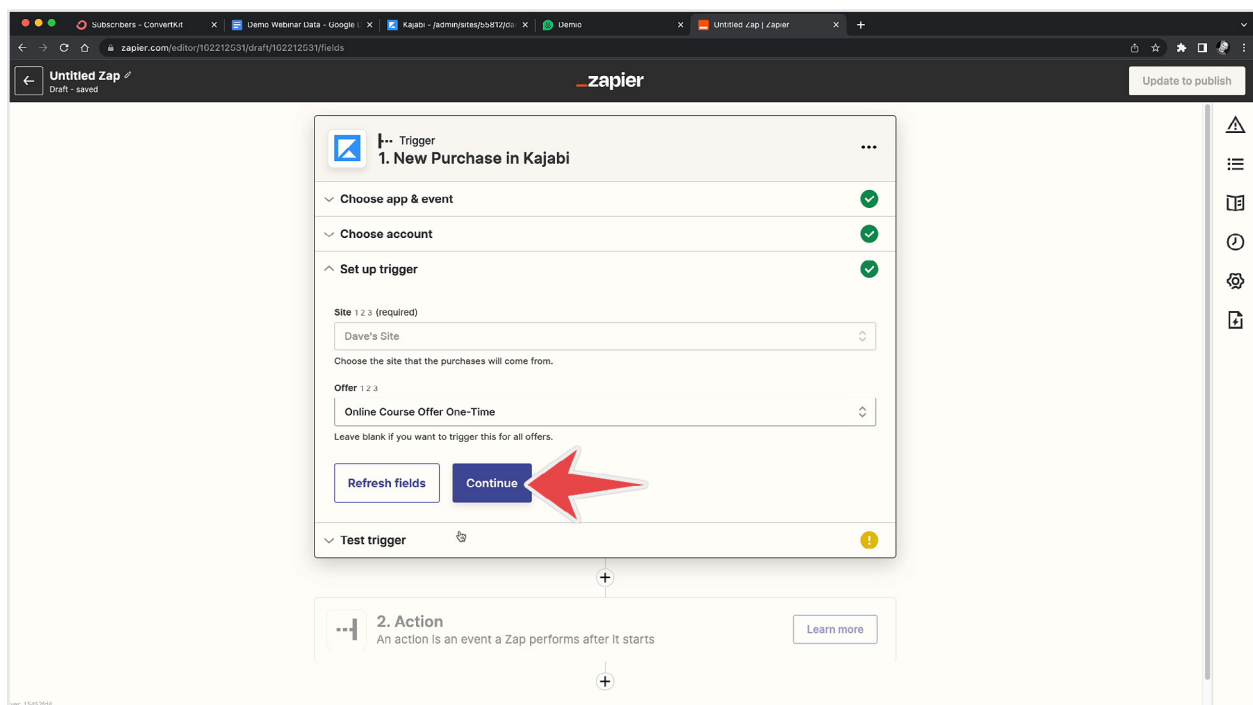
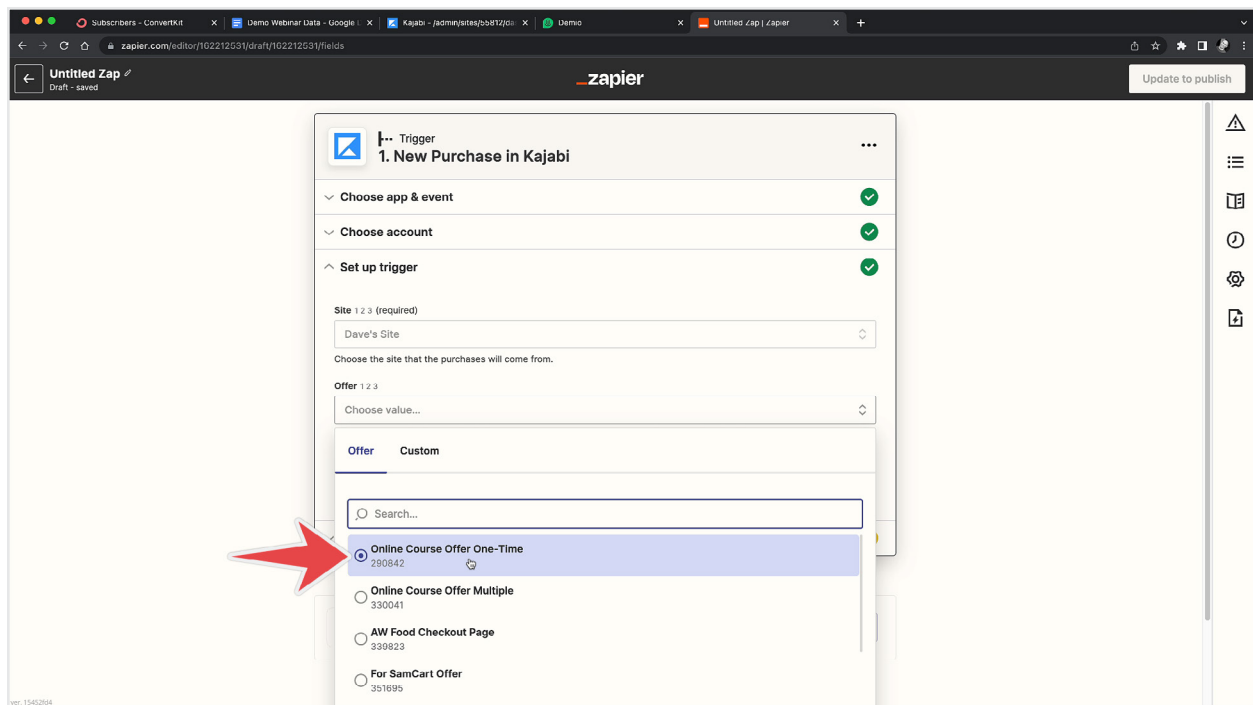


In the next dialog, choose your Kajabi site:



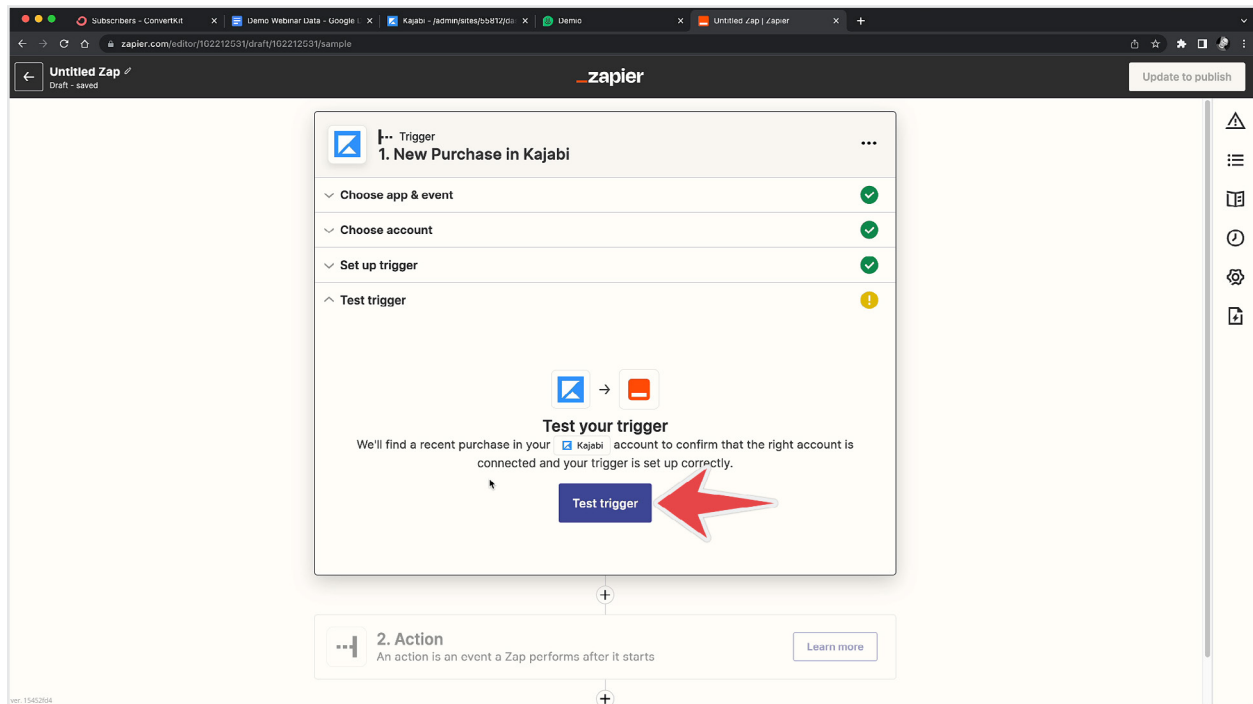
Now you need to select the **Offer** that was purchased. An offer in Kajabi is the price you are charging for your course. Click on the dialog, select the offer you have setup in Kajabi for your course and then click on **Continue**:



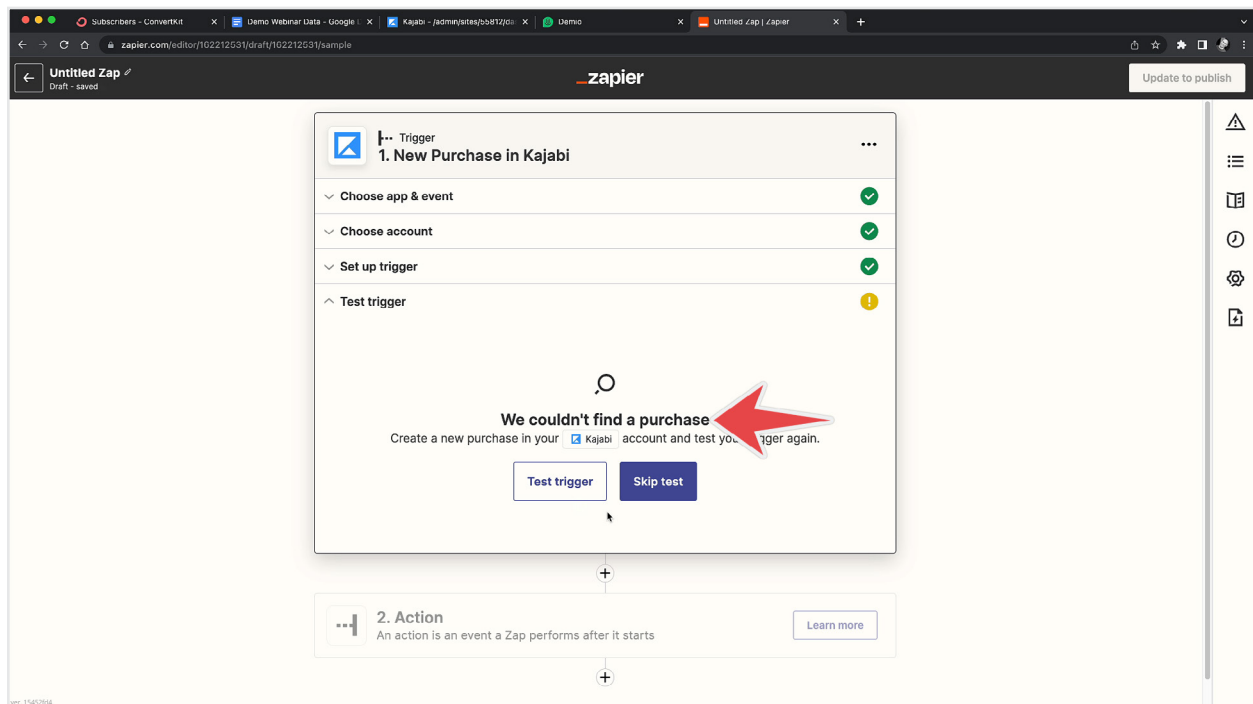


Now here's a potential gotcha to be aware of. You might be offering your course with multiple payment plans, for example, people could make a one time payment or multiple payments over time. If that's the case, you would only select one of your offers here. Then you would need to make an entirely new Zap, following the same process laid out here, but selecting your other offer for that Zap.

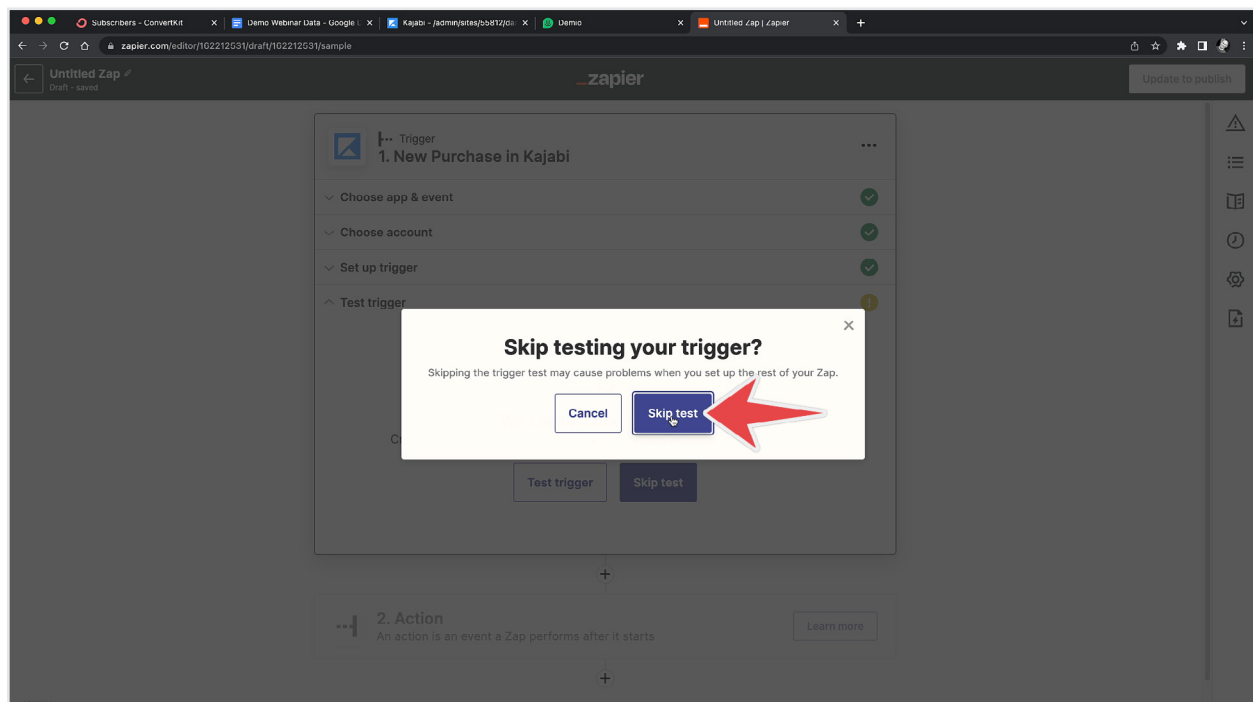
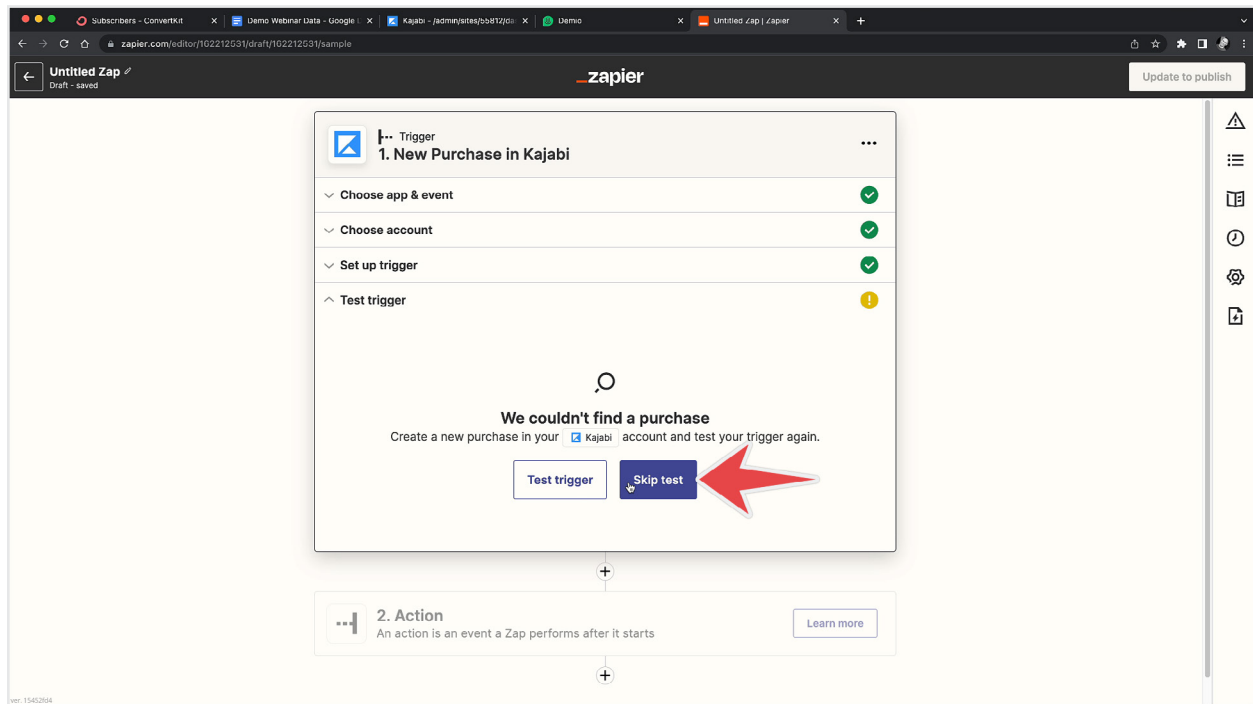
Next, you'll be asked to test your trigger, so click on **Test Trigger**:



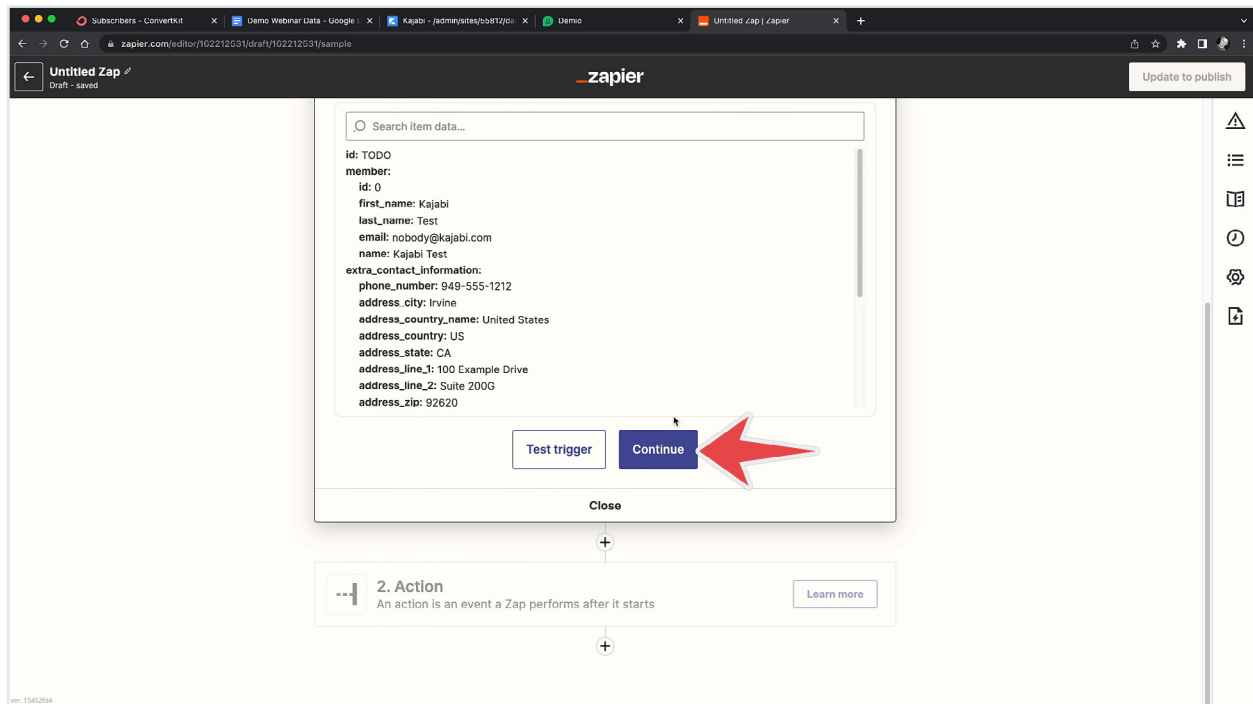
If you don't have any customer in Kajabi yet, you might see a message like this:



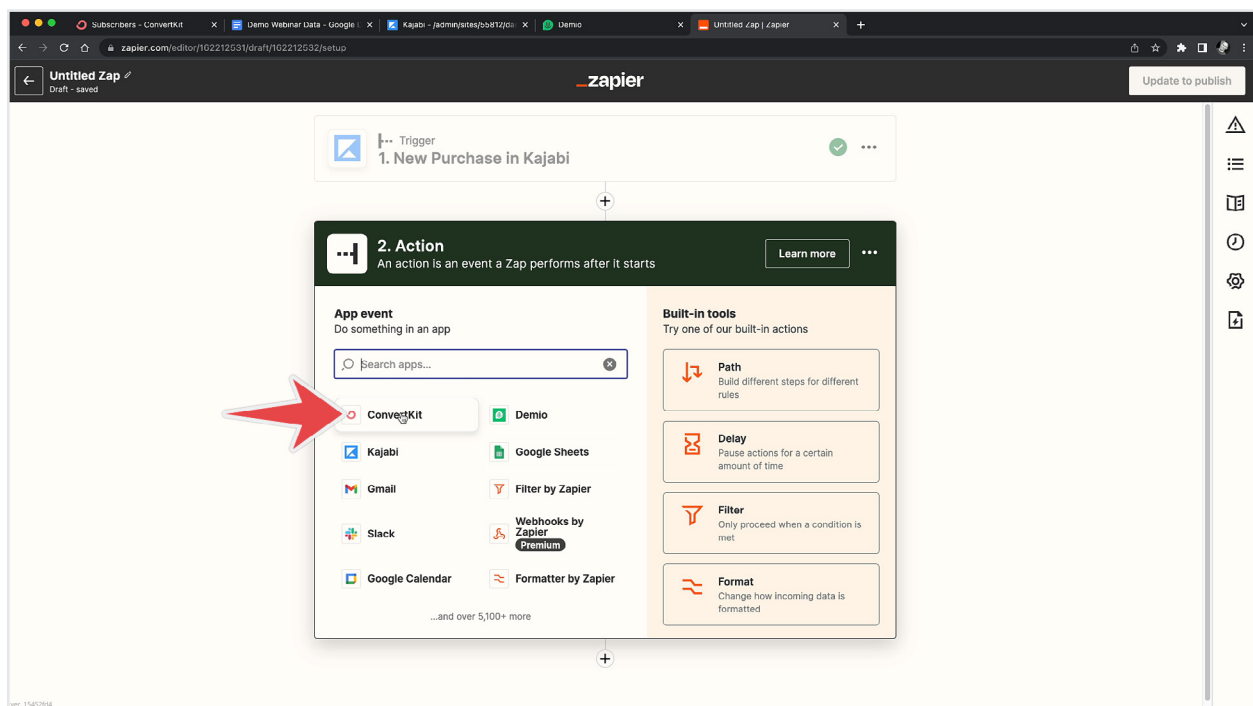
If that's the case, just skip the test by click the **Skip Test** buttons:



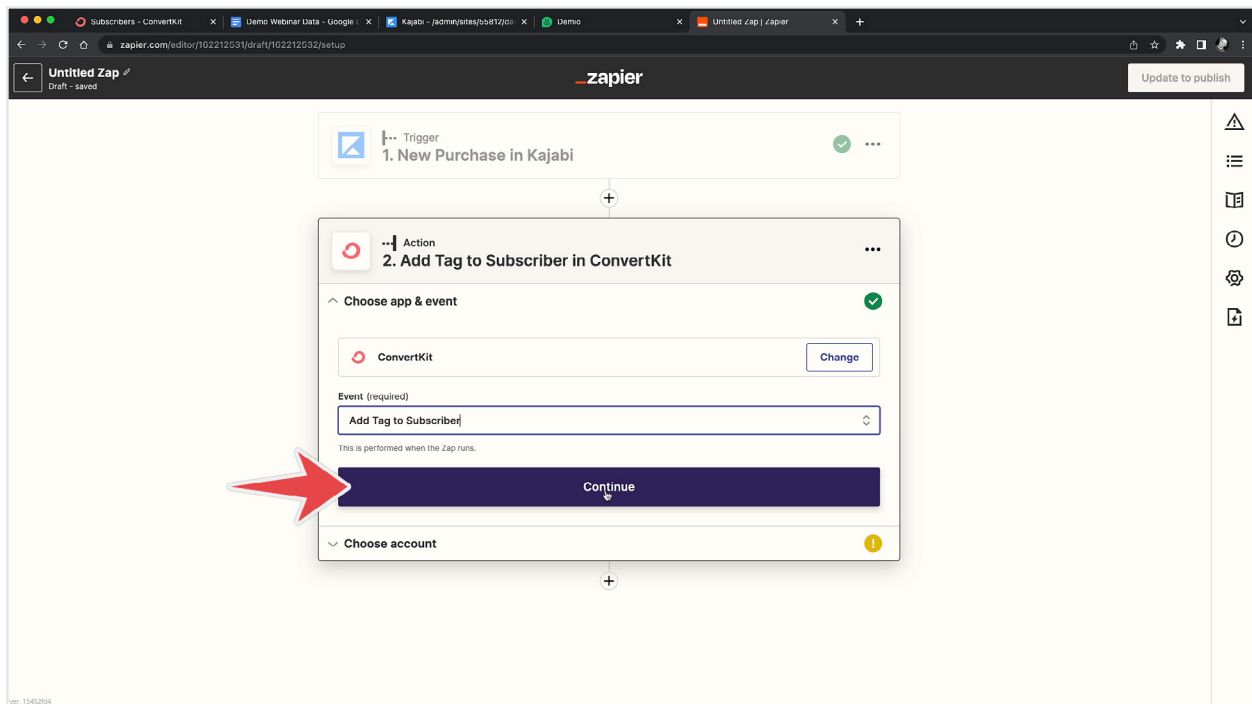
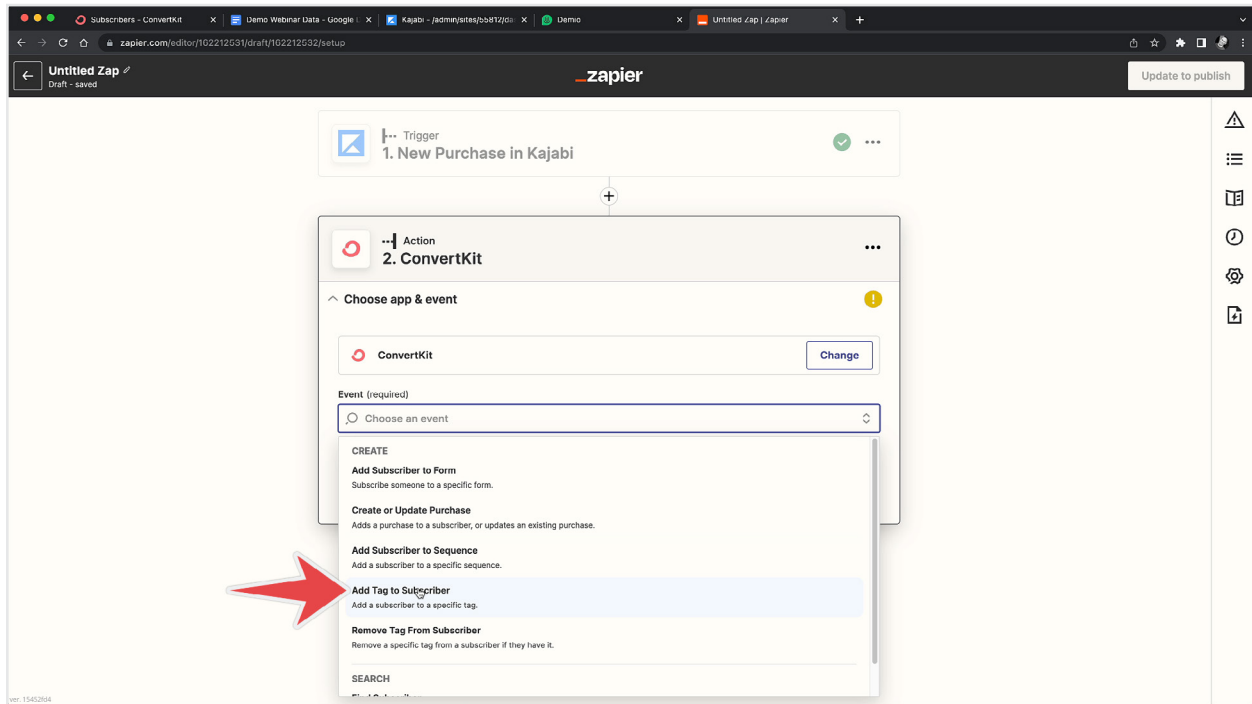
Next, click on **Continue**:



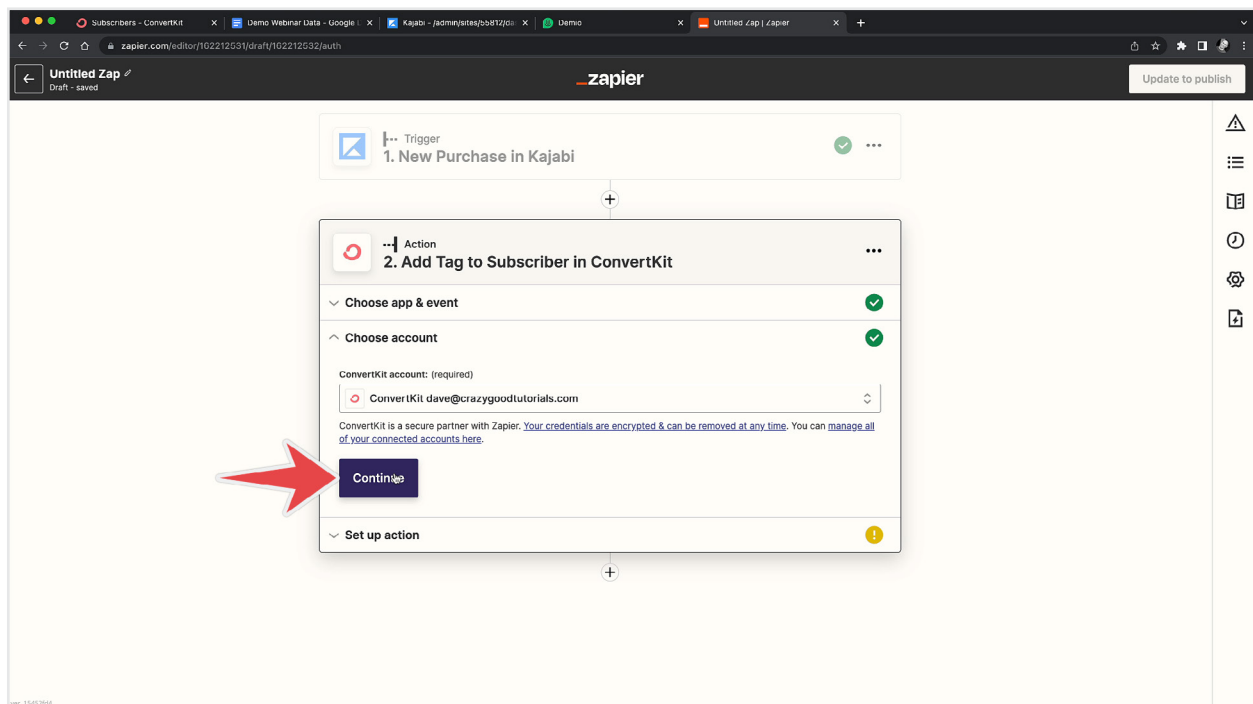
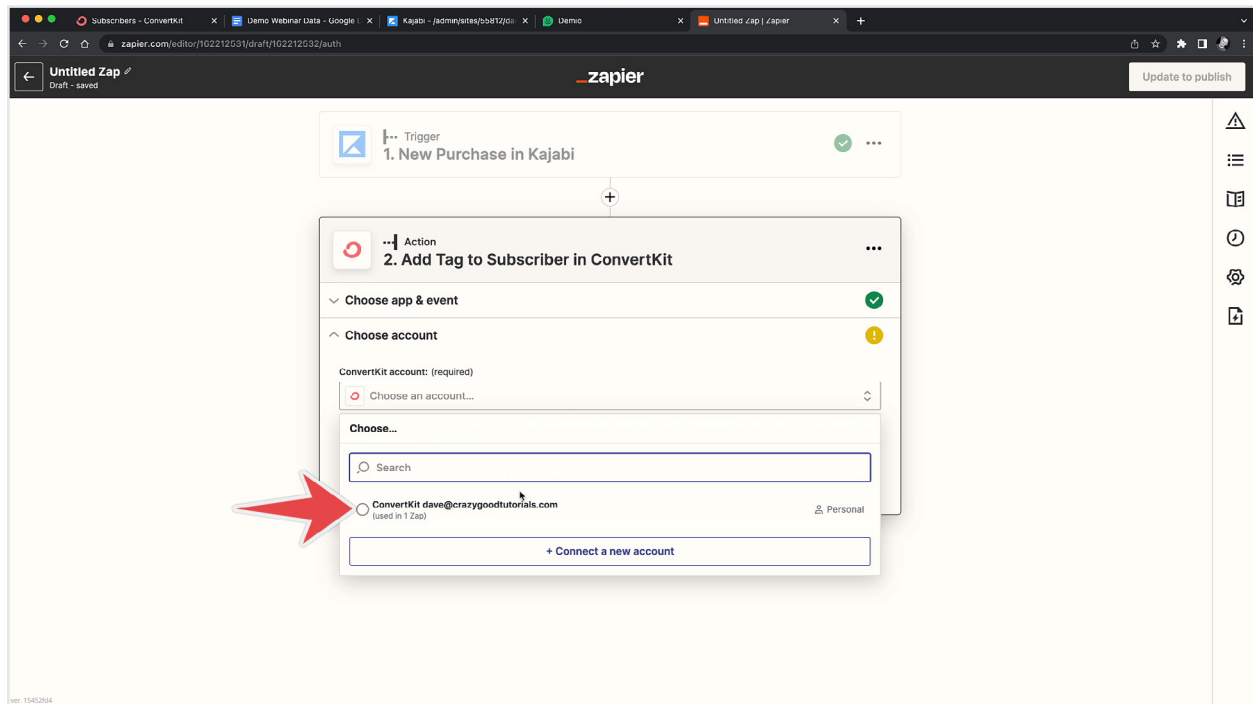
Now you need to choose the **Action** and your action will be in ConvertKit. So click on **ConvertKit**:



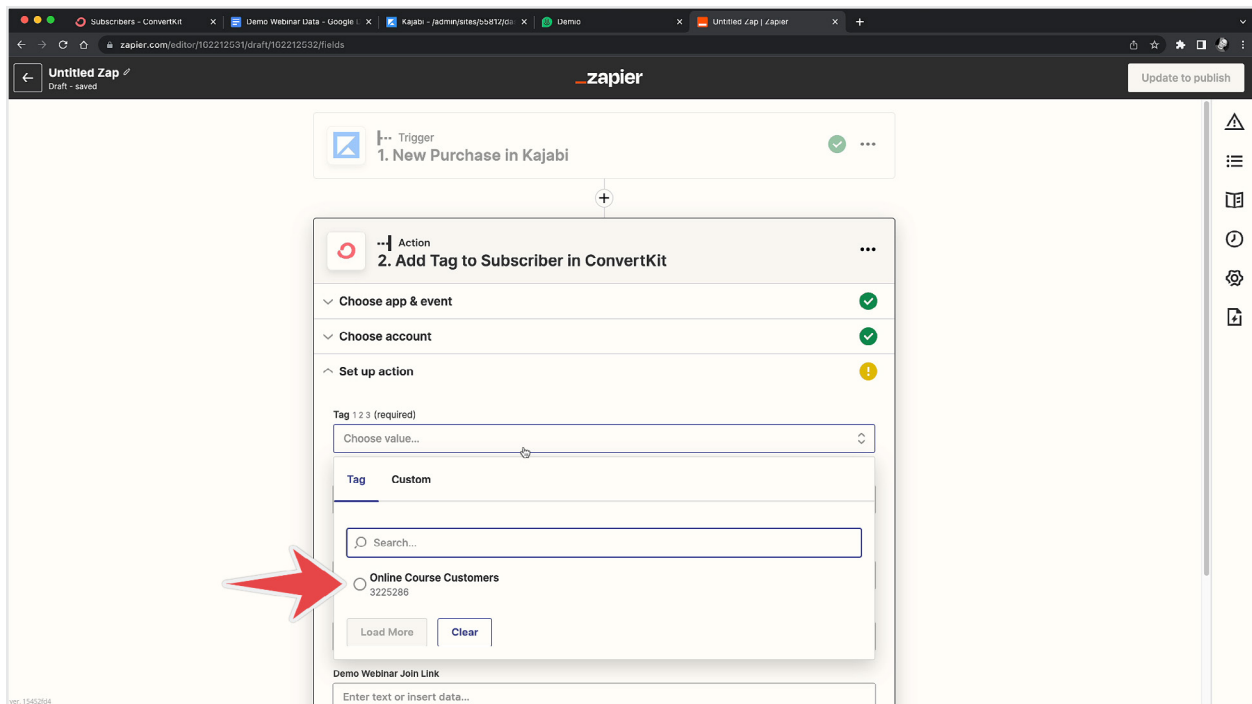
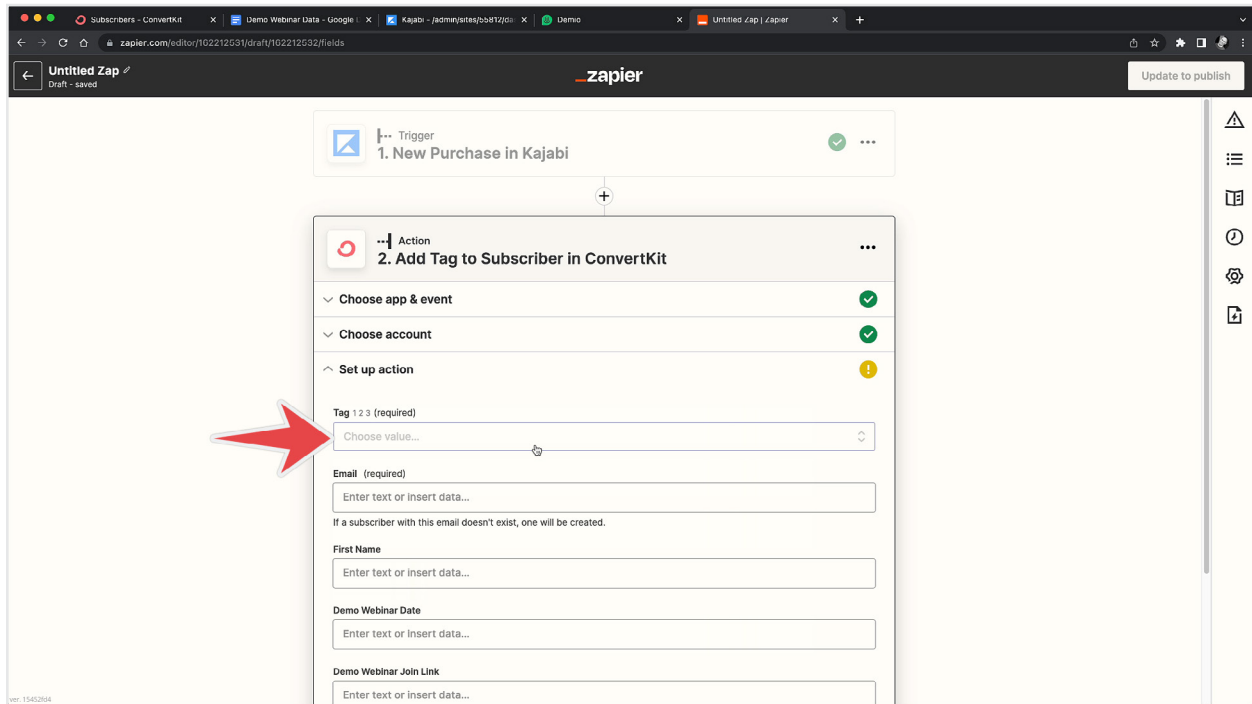
Click on the dialog that appears and choose **Add Tag to Subscriber** and then click **Continue**:



Next, select your ConvertKit account and click **Continue**:

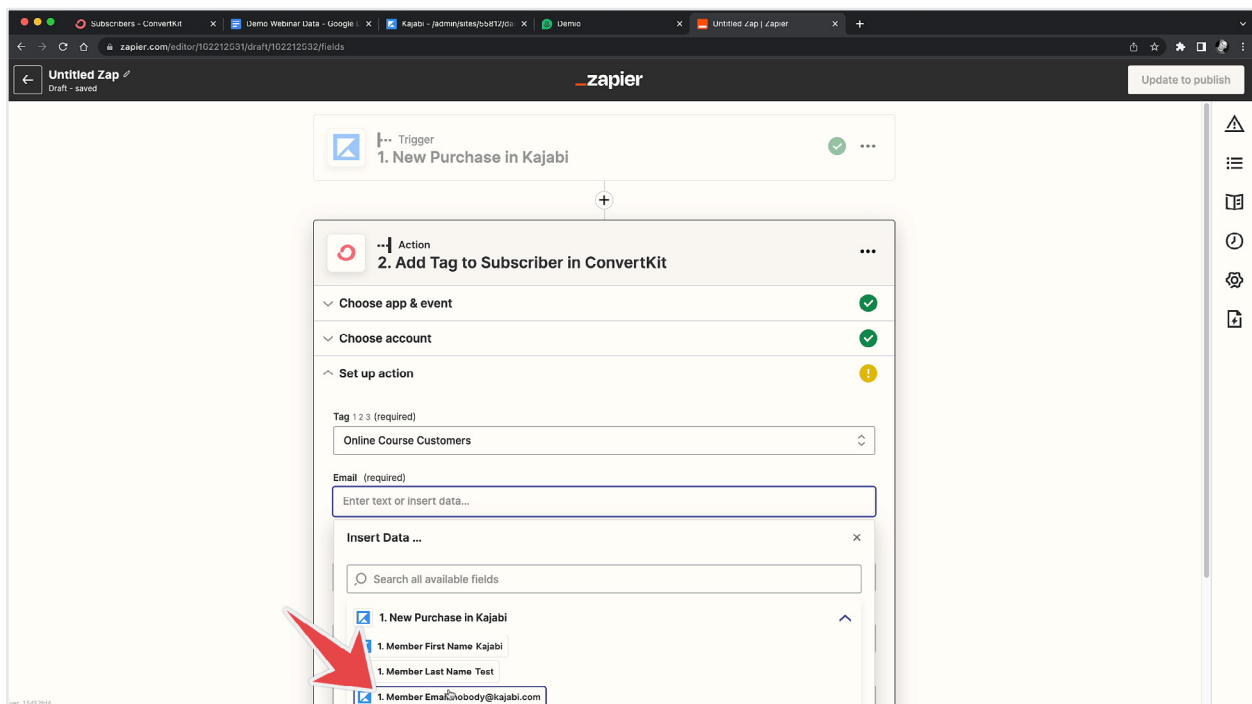
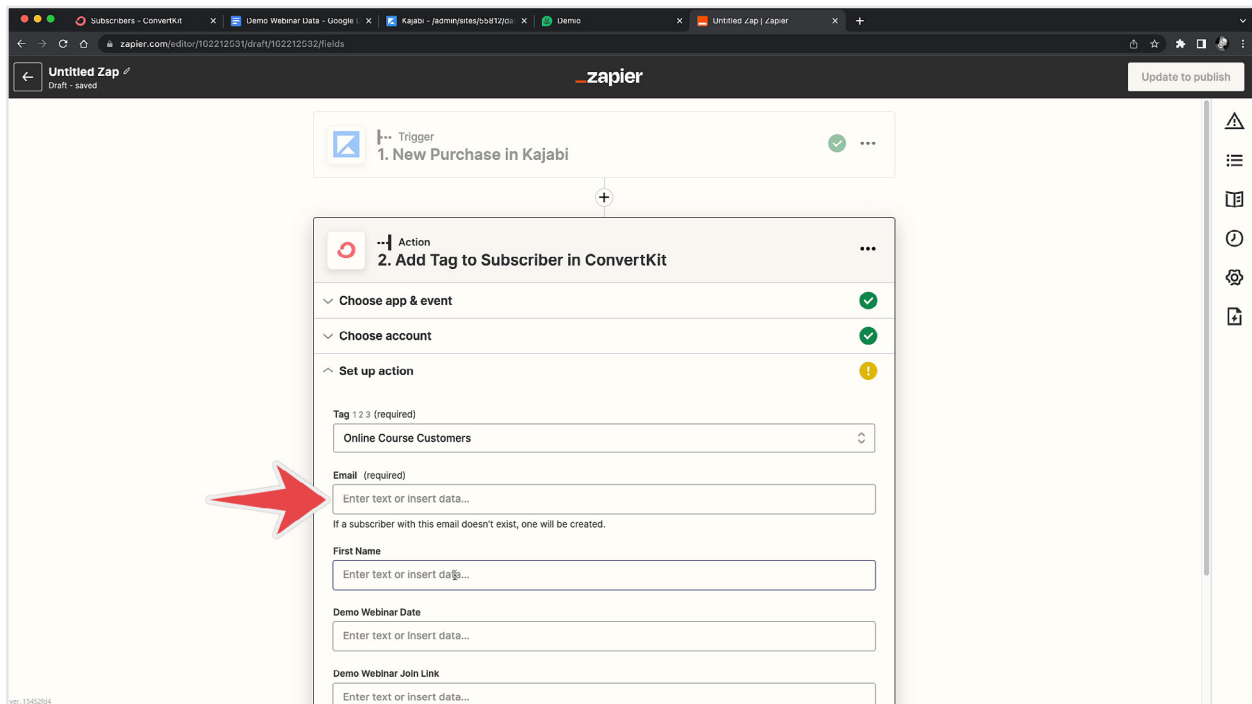


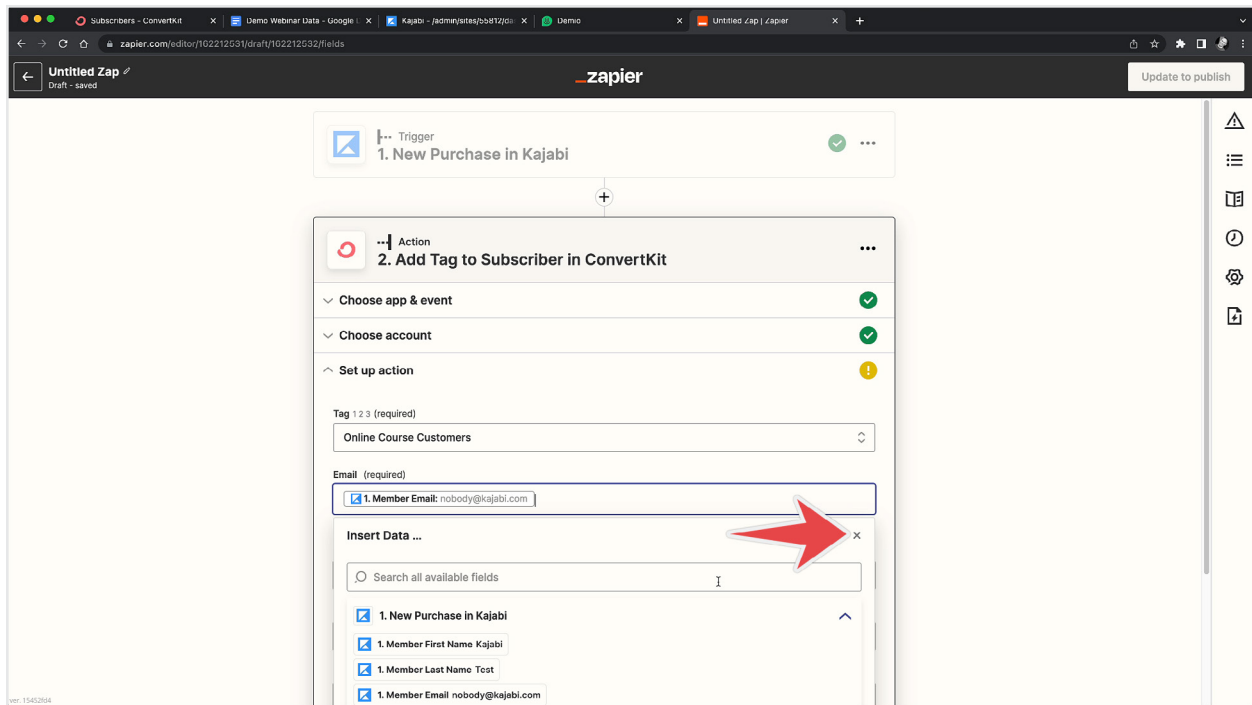
Now you need to select the tag to use. Click on the dialogue and select the tag you created in ConvertKit to designate your course customers:



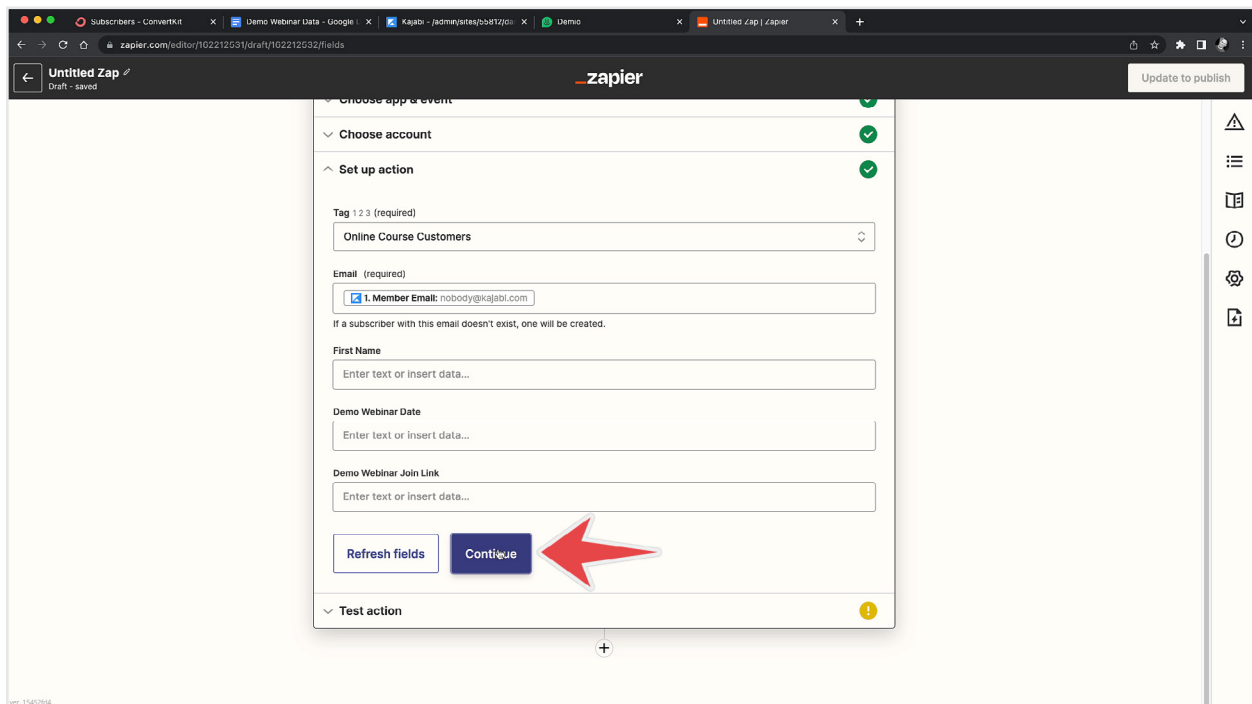
Next, you need to map data between Kajabi and ConverKit. But the only data you need to map is the email address.

So click on the **Email** dialog, select the **Member Email** for Kajabi and then click on the **X** to close the dialog:

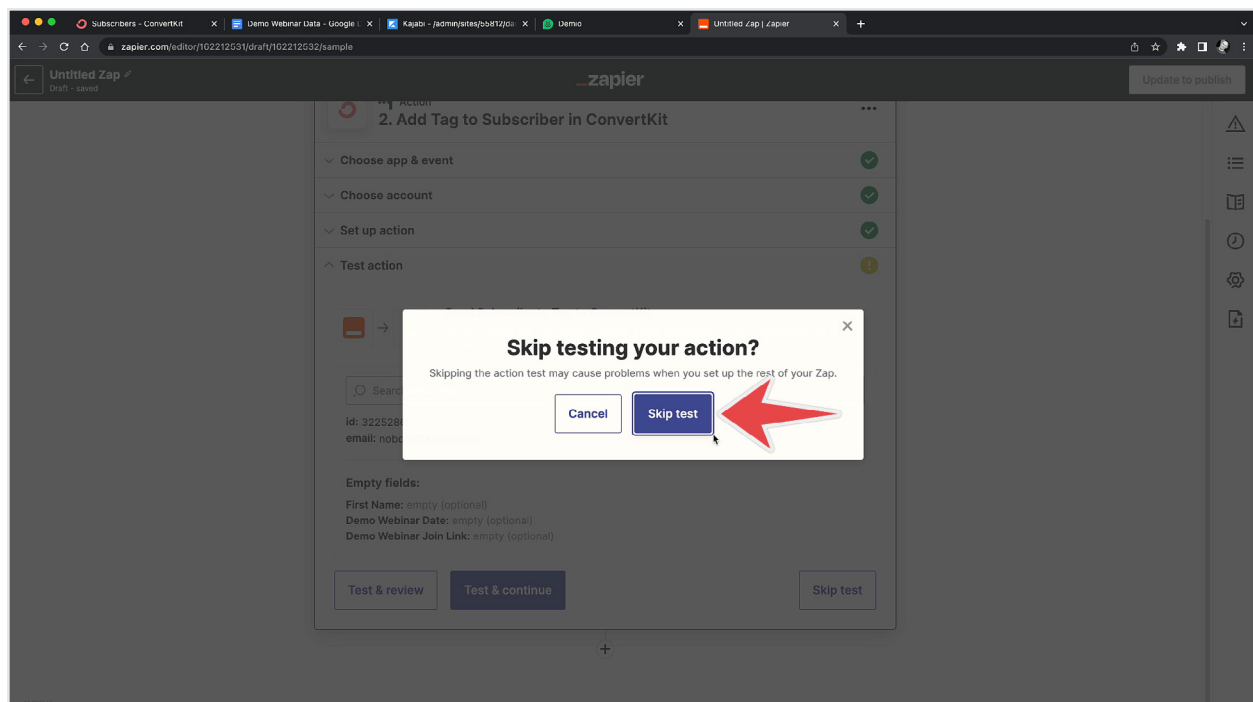
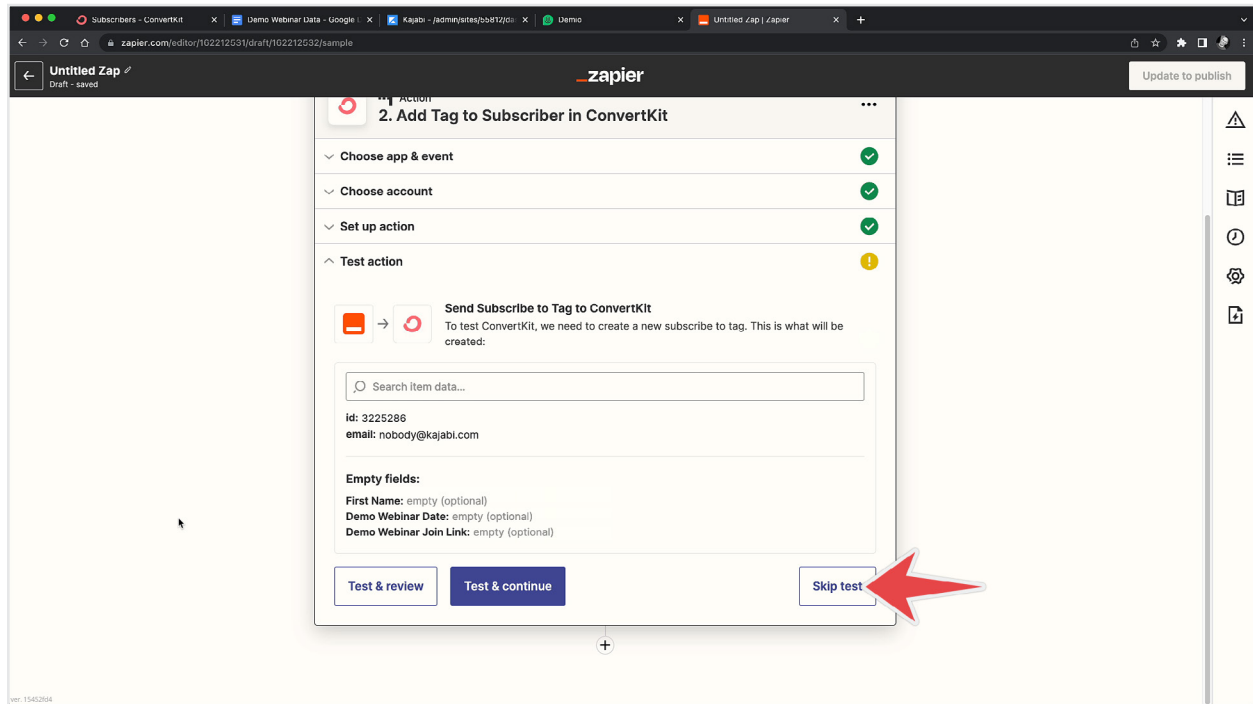




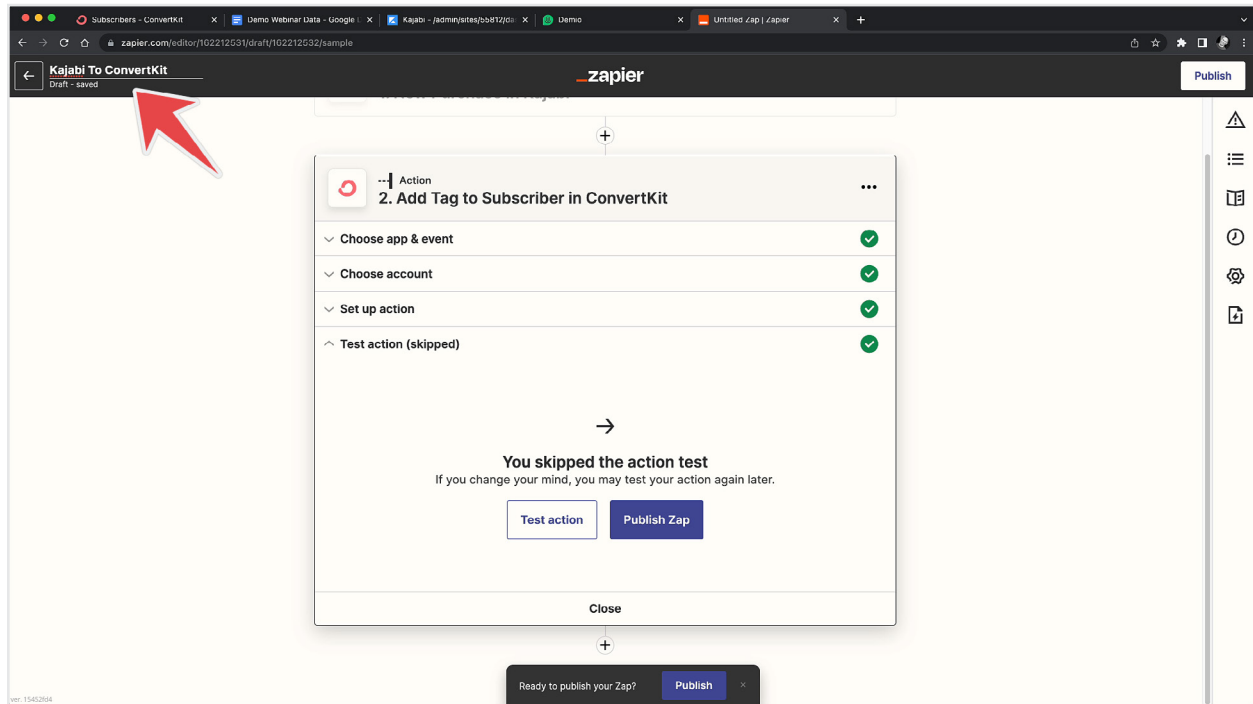
You don't need to map any other data, so click on **Continue**:



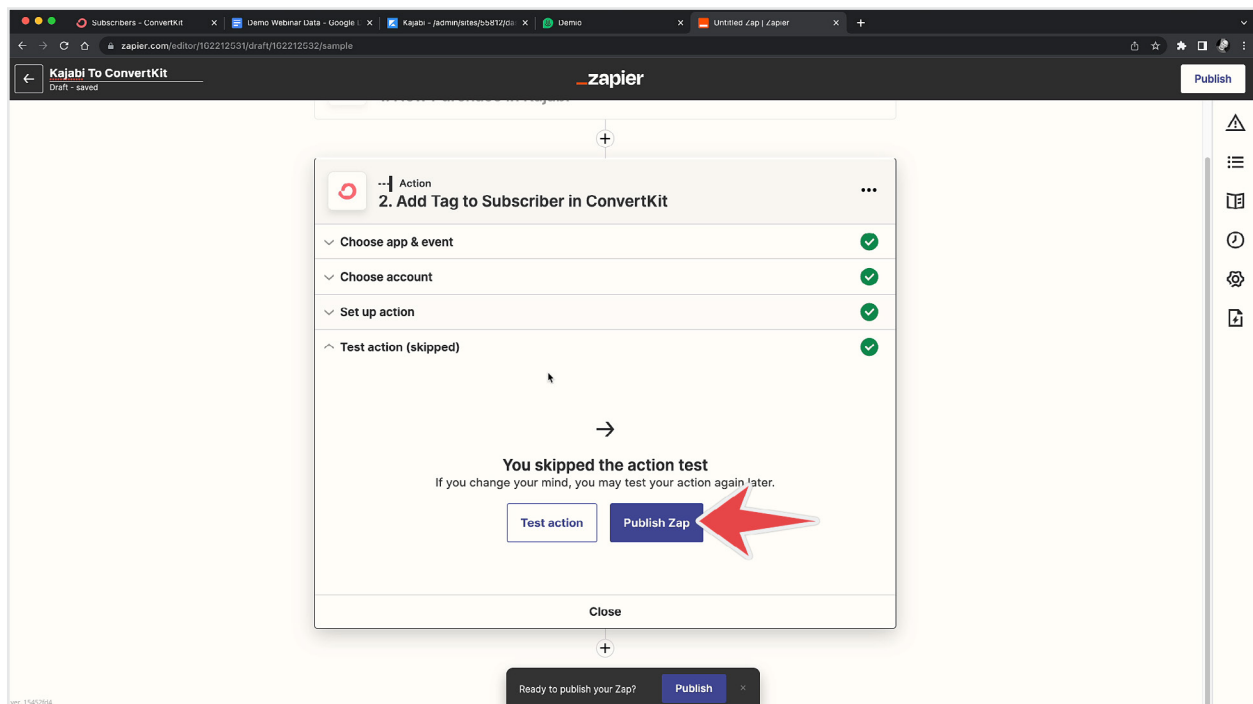
Next, you'll be asked to perform a test. You can skip this test, so click on the **Skip Test** buttons:

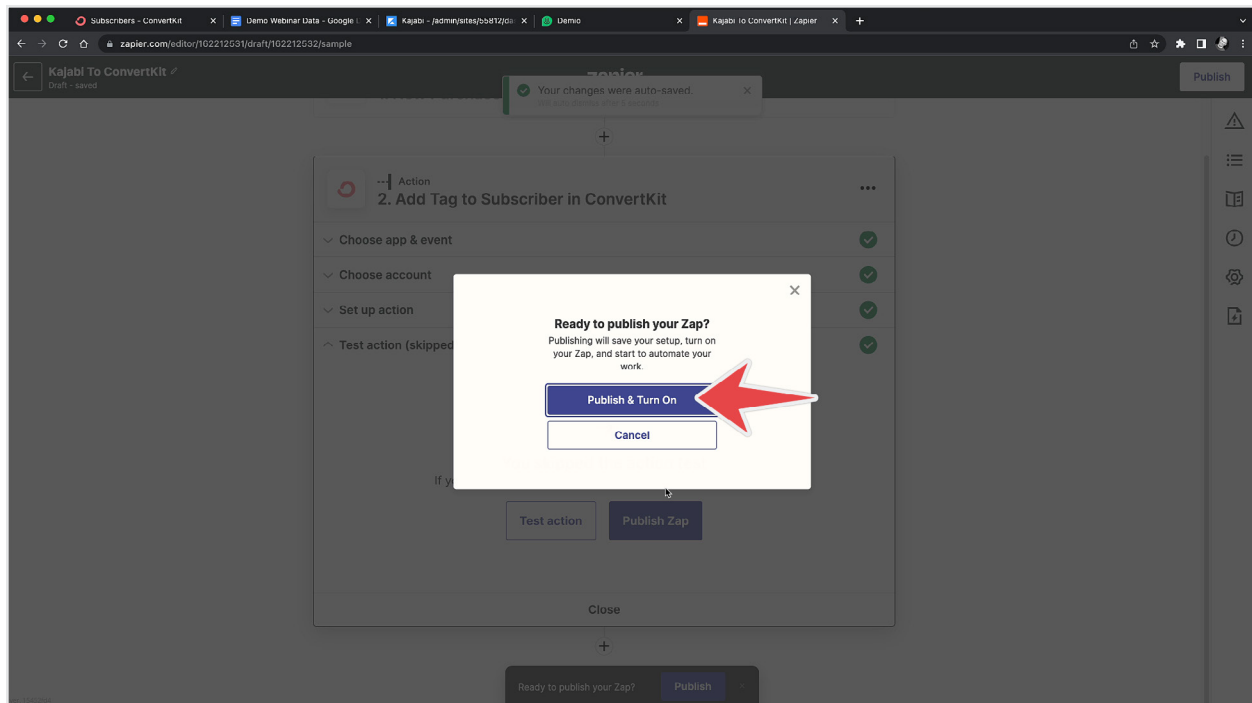


Next, go to the upper left hand corner, click on the pencil and give your Zap a name that makes sense to you:

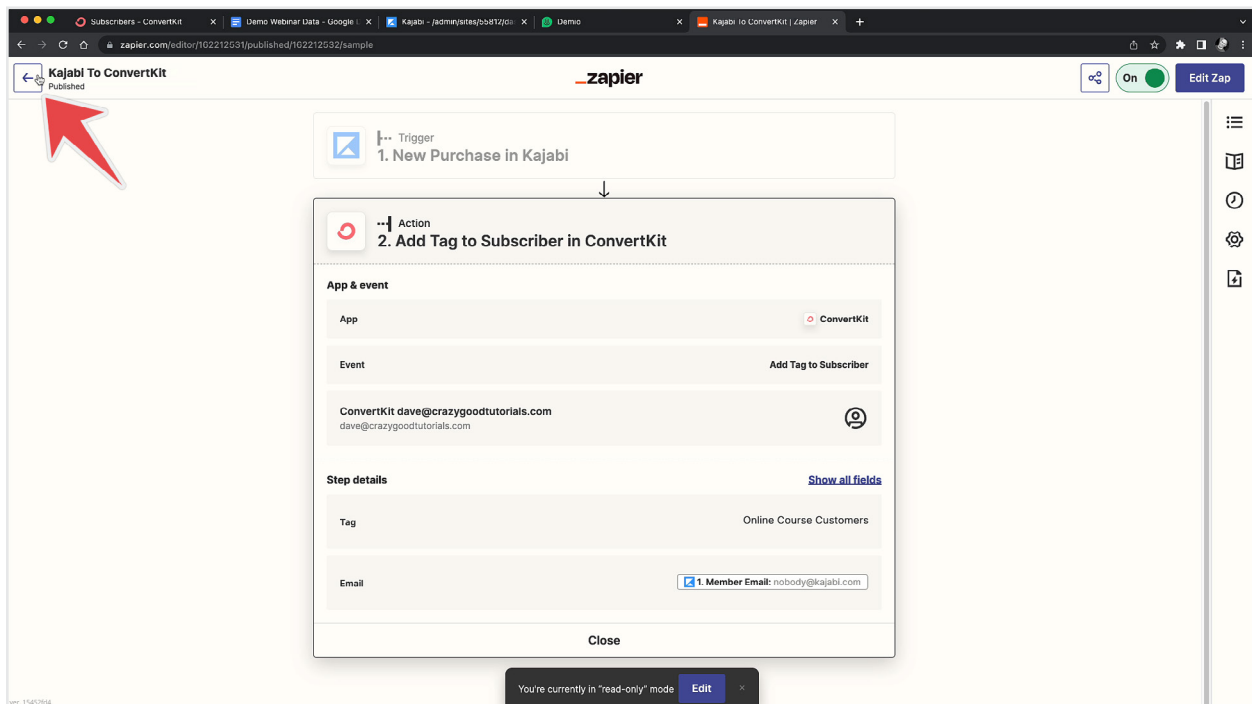


Then click on **Publish Zap** and then **Publish and Turn On**:

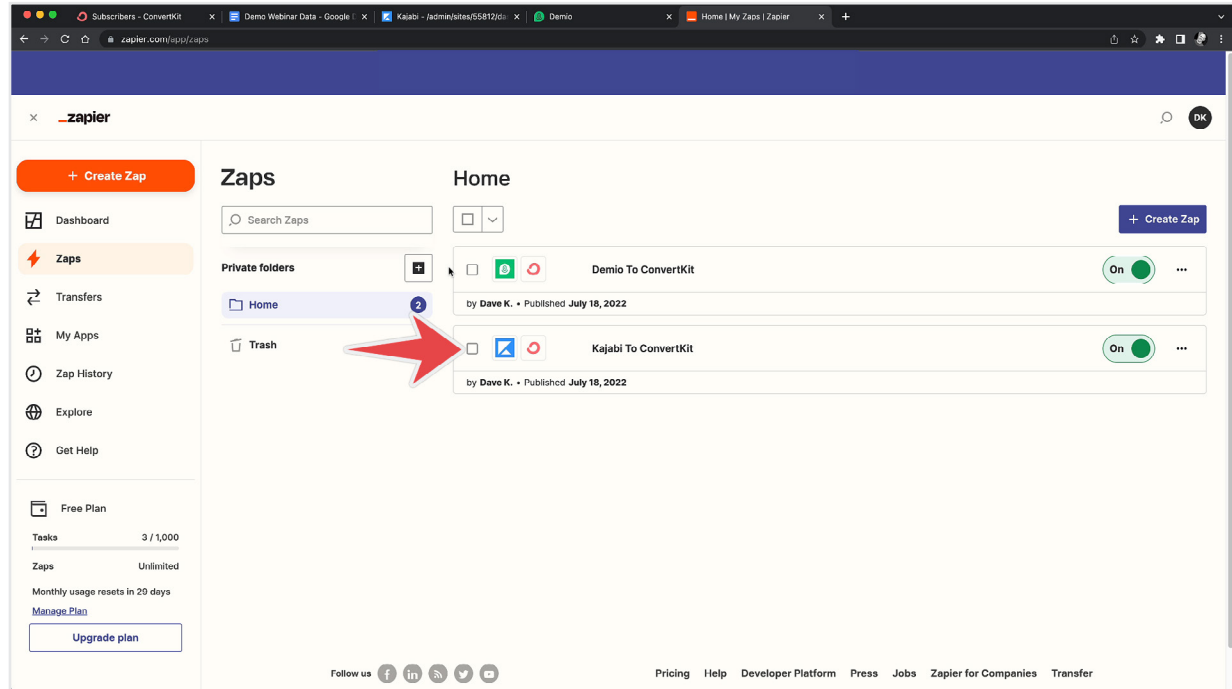




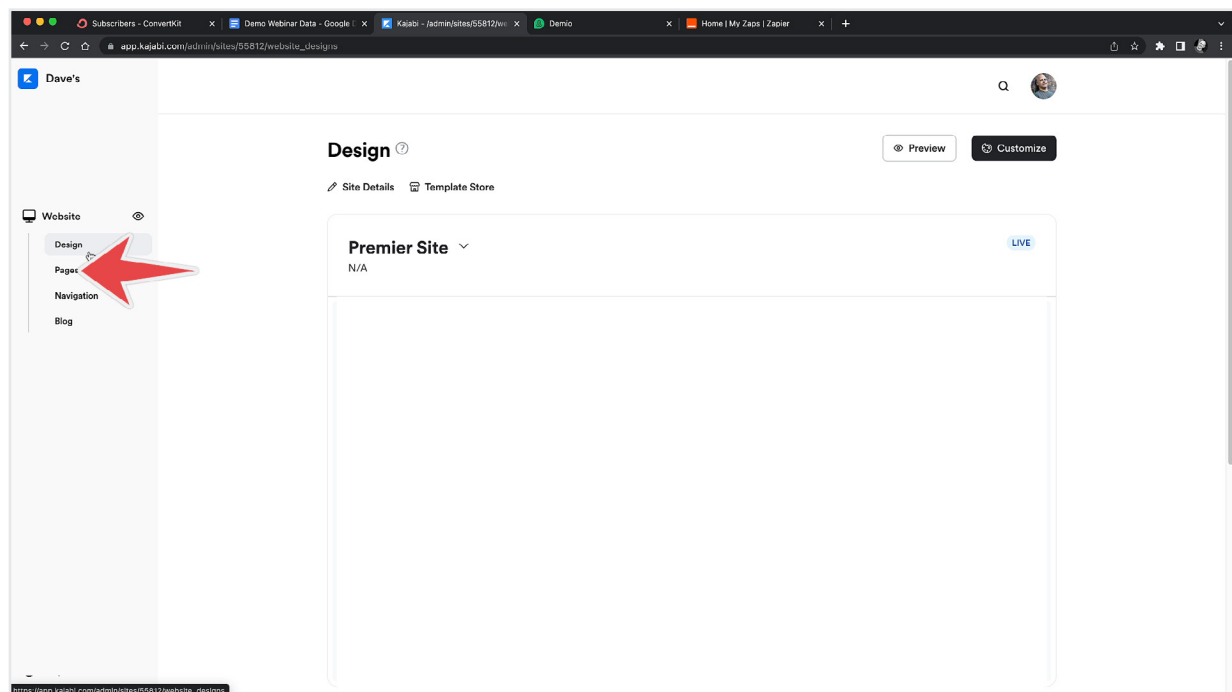
Now go to the upper left hand corner and click on the back arrow:



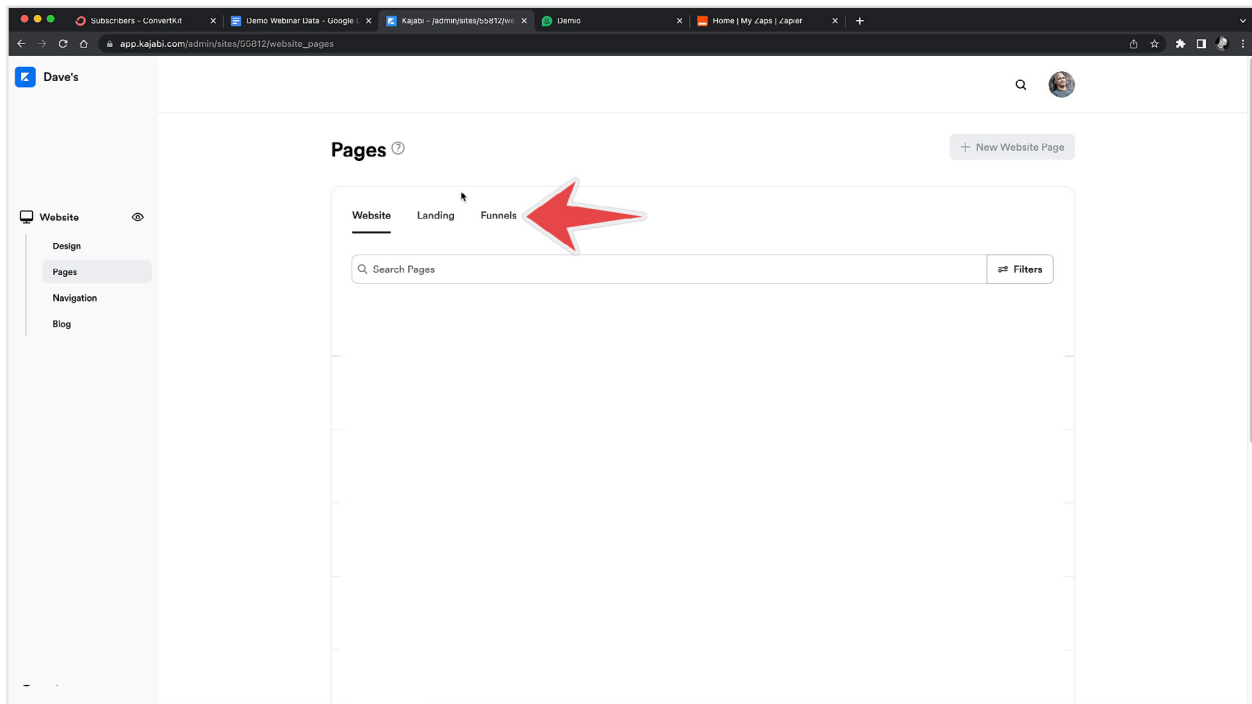
And you'll be able to see the two Zaps you created using this guide. But remember, if you are offering more than one payment option for your course, you will need to create a separate Zap using the same steps just shown, for each payment plan you offer:



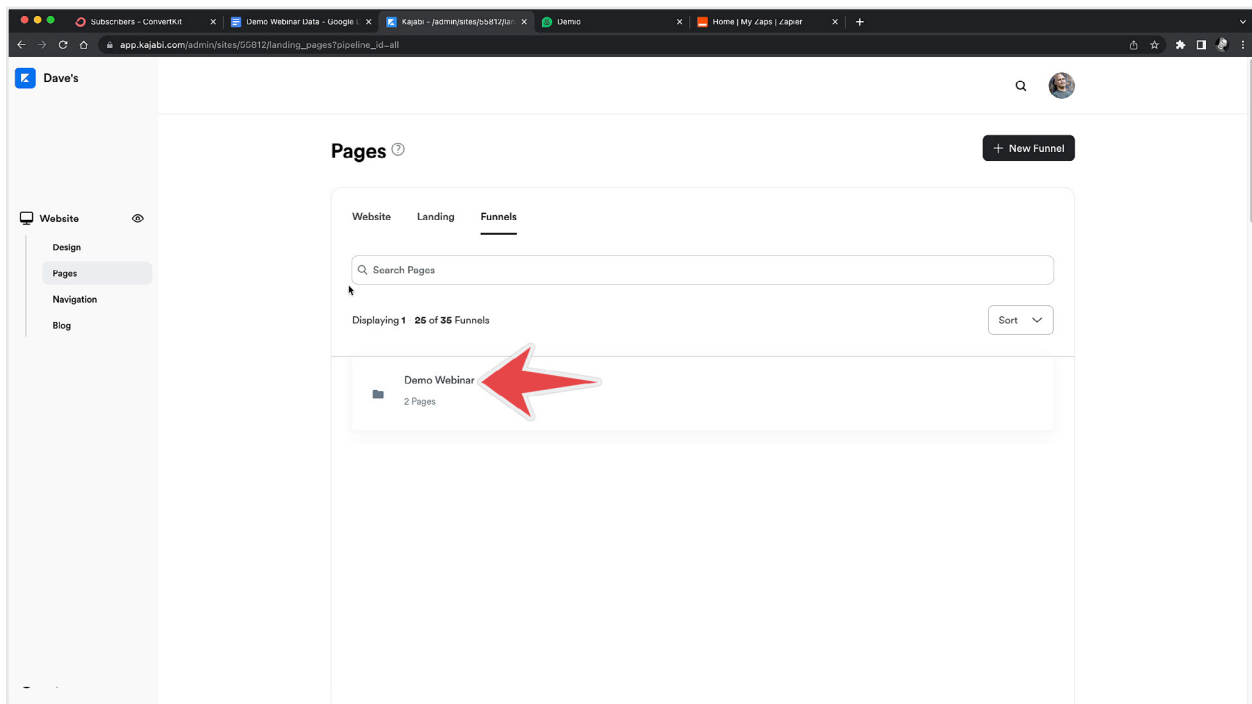
Now it's time to test everything. And to do that, go into Kajabi and from the panel on the left, click on **Website** and then **Pages**:



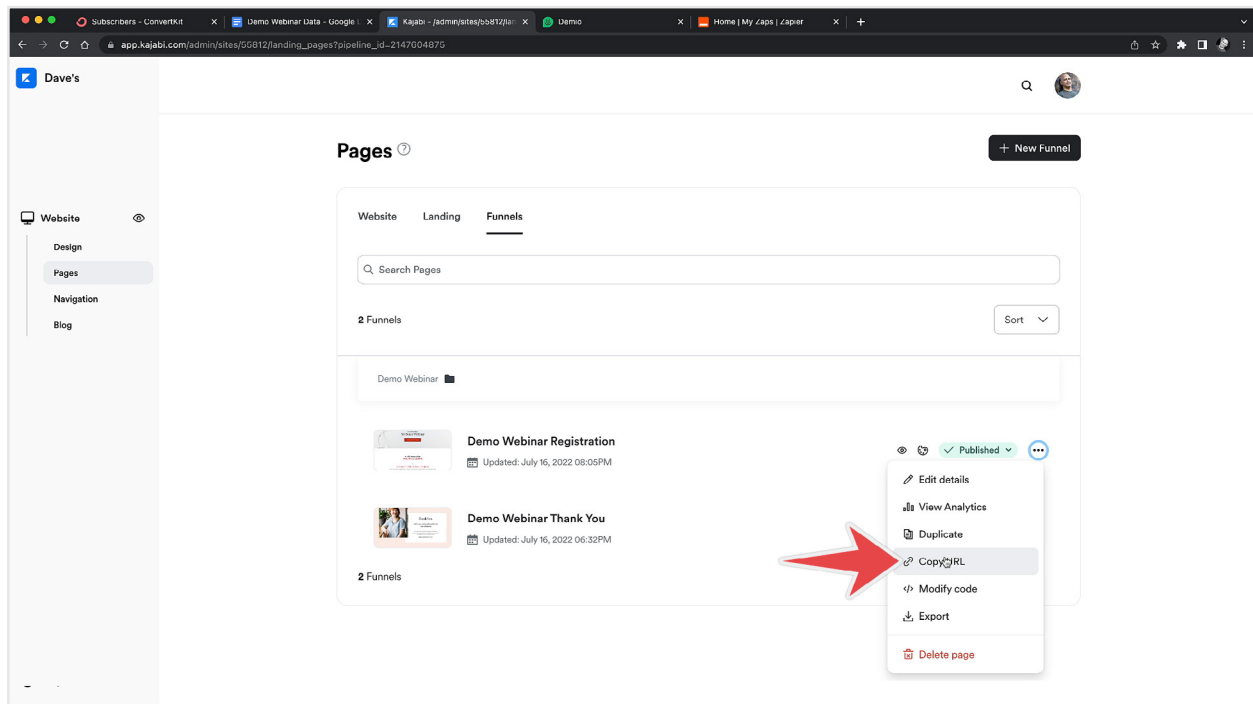
Then click on **Funnels**:



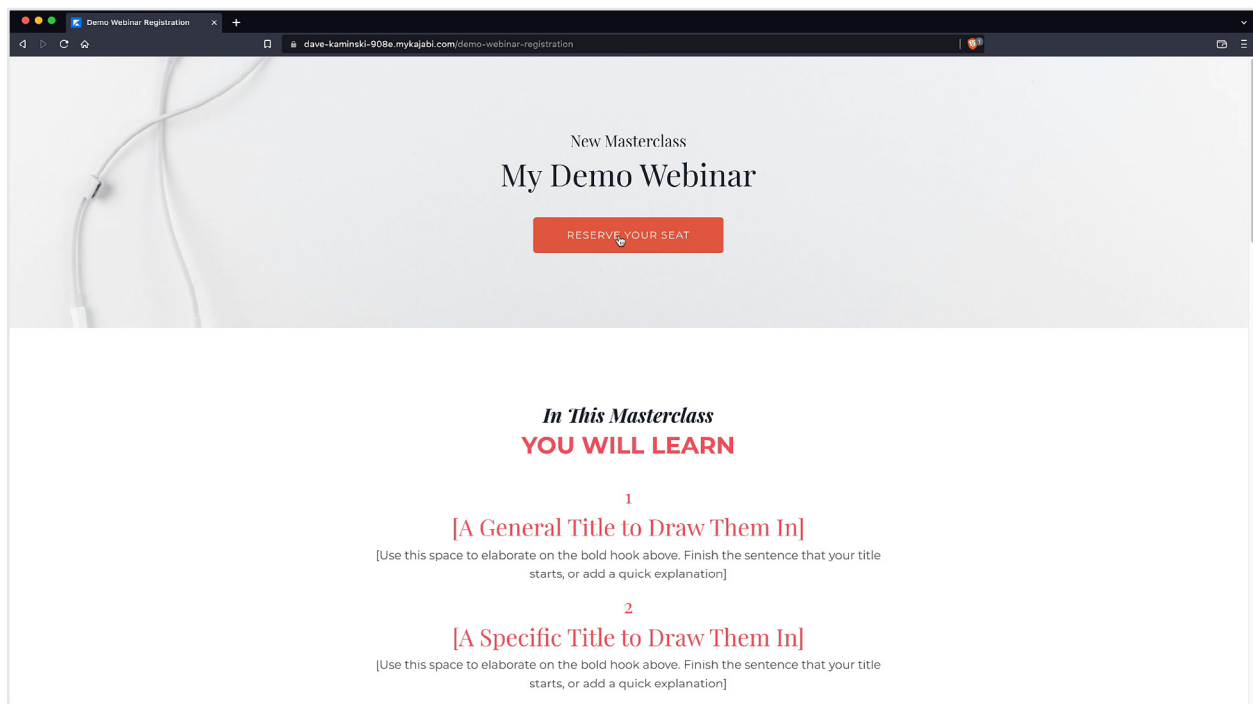
You'll see the funnel listed that you created in **Step 1**. Click on it:



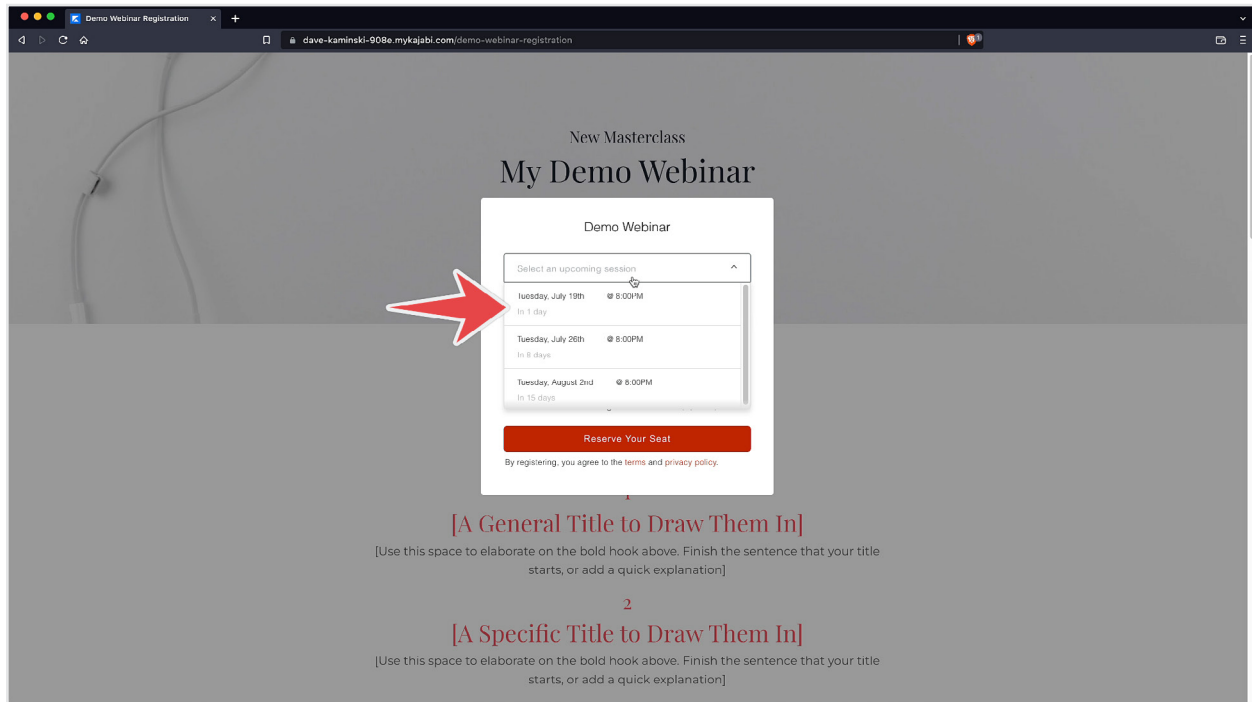
And then for your **webinar registration page**, go over to the three horizontal dots to the right, click and choose **Copy URL**:



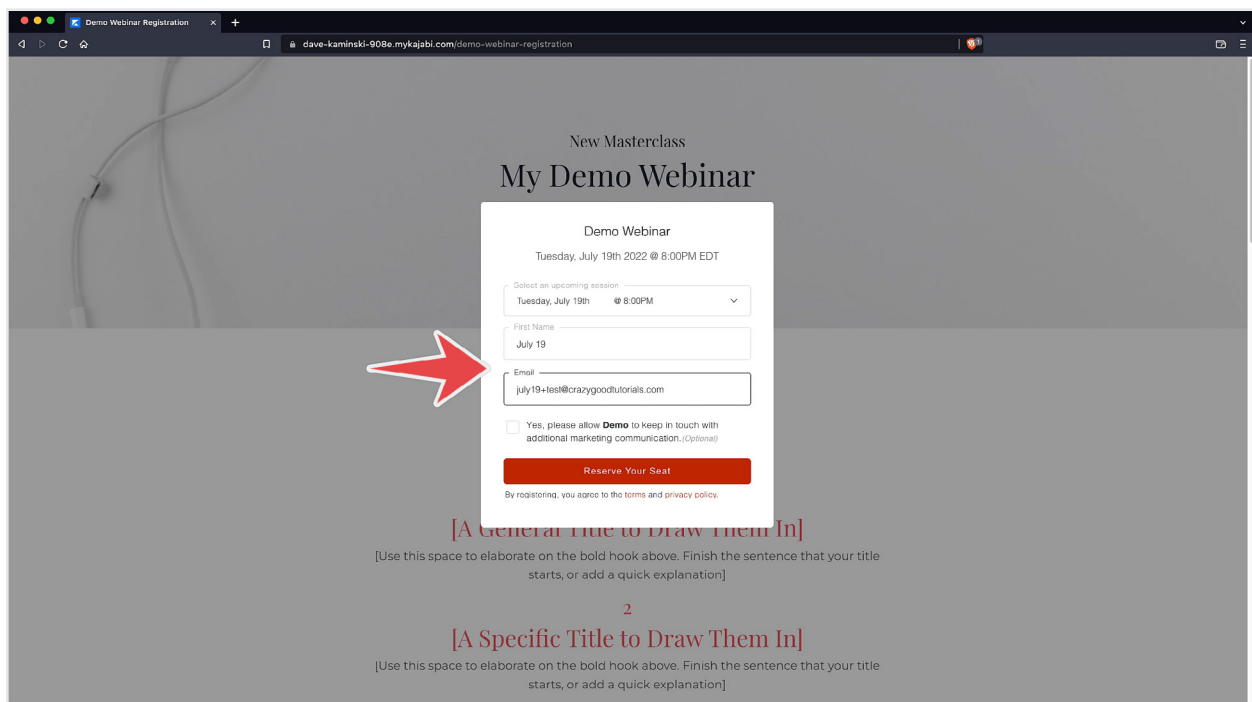
Open a new tab in your browser and paste in that URL. Your webinar registration page will appear:



Click on the registration button, go to the first dialogue and select your first webinar:



For the first name and email, I want you to enter a fake first name and fake email that reflects the date of the webinar. For example, my webinar is on July 19th, so you can see how I've formatted my name and email:



Then click on the button to register:

New Masterclass
My Demo Webinar

Demo Webinar
Tuesday, July 19th 2022 @ 8:00PM EDT

Select an upcoming session:
Tuesday, July 19th @ 8:00PM

First Name
July 19

Email
july19+test@crazygoodtutorials.com

☒ Yes, please allow **Demo** to keep in touch with additional marketing communication. (Optional)

Reserve Your Seat

By registering, you agree to the terms and privacy policy.

[A General Title to Draw Them In]
[Use this space to elaborate on the bold hook above. Finish the sentence that your title starts, or add a quick explanation]

2
[A Specific Title to Draw Them In]
[Use this space to elaborate on the bold hook above. Finish the sentence that your title starts, or add a quick explanation]

You'll see your thank you or confirmation page:

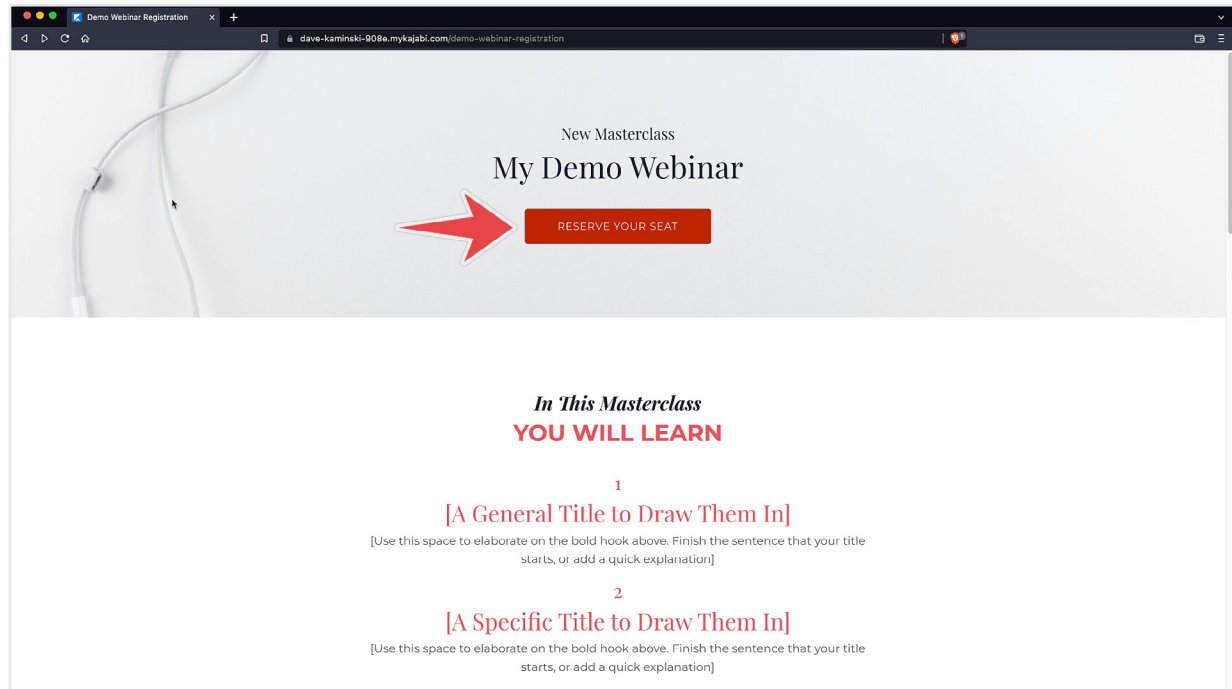
Thank You.

Add your catchy subheadline in this spot here!

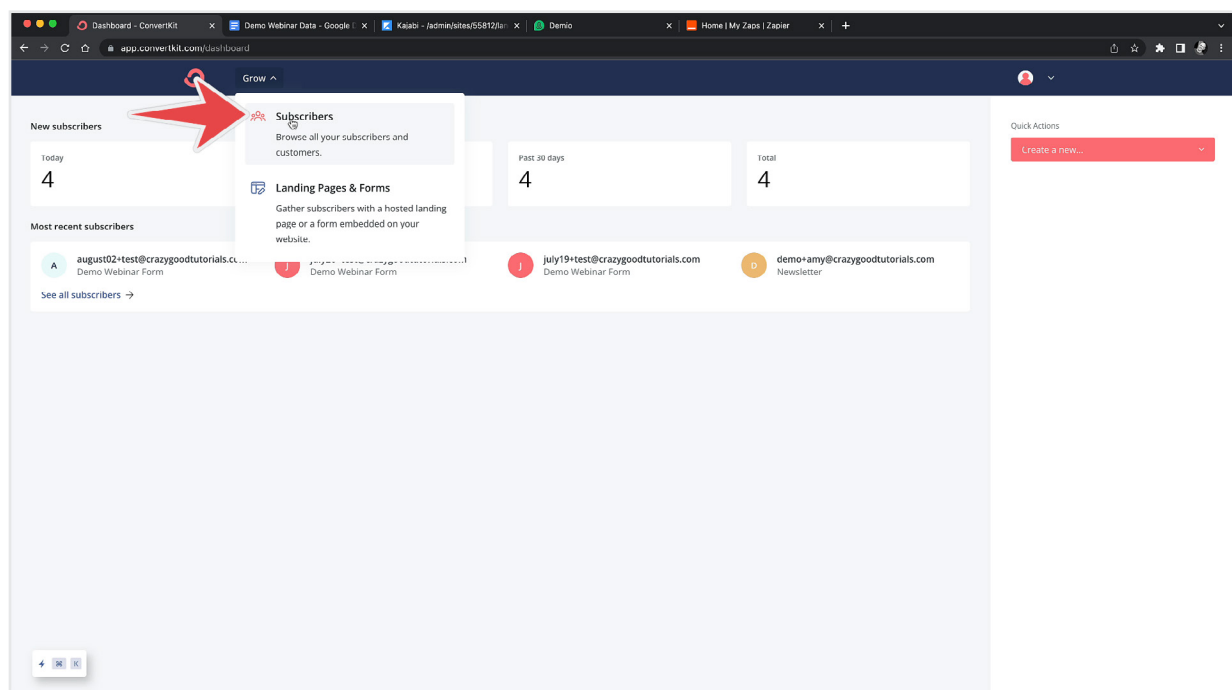
P.s. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

support@youremail.com.

Next, click on the back button in your browser to return to the webinar registration page and refresh your browser. Now you are going to repeat the same process you just did, but for your remaining two webinars. Be sure to use fake names and fake email addresses that reflect the dates of your webinars:



Now it's time to verify that everything is working correctly. And you'll start in ConvertKit. From the menu at the top, choose **Grow** and then **Subscribers**:



Scroll down to the **Segments** section and you should see a registrant for each of the three webinars:

The screenshot shows the ConvertKit subscribers interface. At the top, there's a timeline from June 19, 2022, to July 18, 2022. Below this, summary statistics are displayed: LIFETIME TOTALS (4 TOTAL SUBSCRIBERS, 0.00% AVG OPEN RATE, 0.00% AVG CLICK RATE, 0 EMAILS SENT) and TODAY (4 NEW SUBSCRIBERS). A 'Confirmed Subscribers' section contains a table with 4 entries, all with a status of 'Confirmed'. On the right sidebar, the 'Segments' section is highlighted with a red box, showing three segments: 'Demo Webinar #1 Registrants' (1 SUBSCRIBER), 'Demo Webinar #2 Registrants' (1 SUBSCRIBER), and 'Demo Webinar #3 Registrants' (1 SUBSCRIBER). Below these are 'Sales Booster People' (1 SUBSCRIBER) and a '+ Create a Segment' link. Other sections like 'Tags' and 'Products' are also visible.

SUBSCRIBER	SUBSCRIPTION DATE	STATUS
August 2 august02+test@crazygoodtutorials.com	Jul 18, 2022	Confirmed
July 26 july26+test@crazygoodtutorials.com	Jul 18, 2022	Confirmed
July 19 july19+test@crazygoodtutorials.com	Jul 18, 2022	Confirmed
Demo demo+amy@crazygoodtutorials.com	Jul 18, 2022	Confirmed

Total: 4

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https://app.convertkit.com/subscribers?subscribable_id=261858&subscribable_type=List

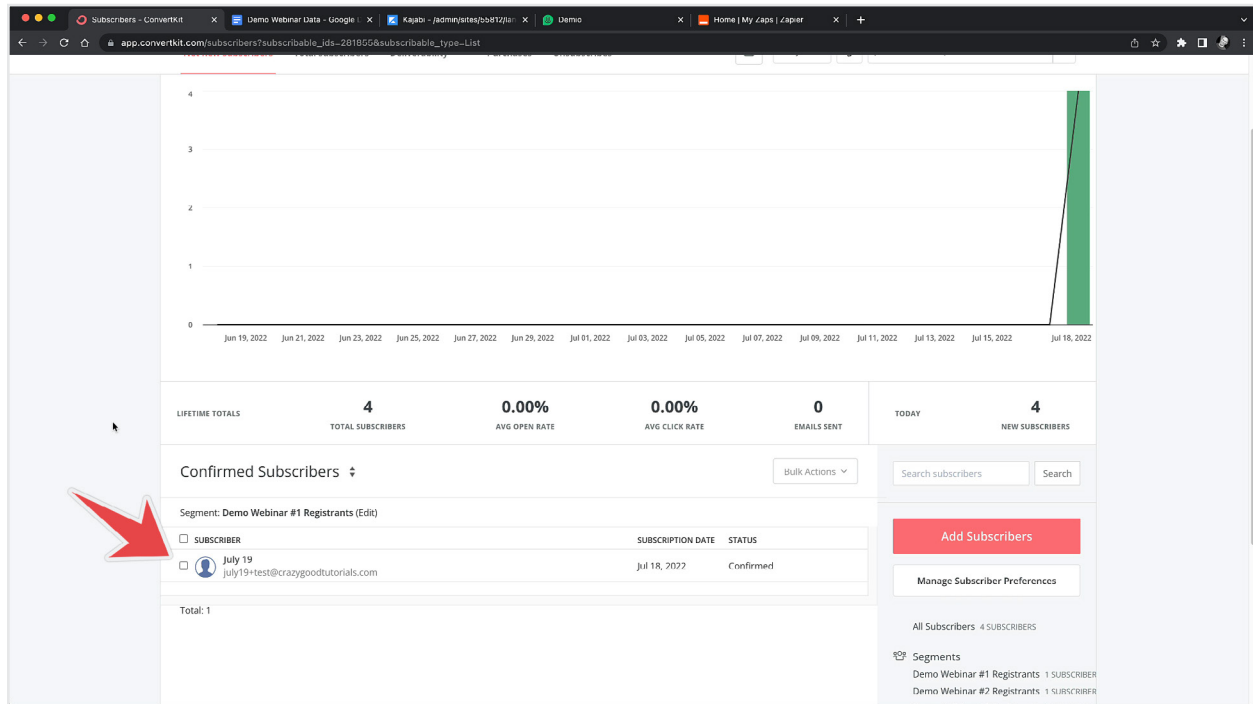
Go to the first segment and click on **Subscriber**:

This screenshot is identical to the previous one, but with a red arrow pointing to the 'Subscriber' link in the first segment, 'Demo Webinar #1 Registrants'. The arrow originates from the right side of the page and points directly to the link.

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https://app.convertkit.com/subscribers?subscribable_id=261858&subscribable_type=List

Scroll down and you should see that the registrant **name** and **email** contain text that matches the date of your first webinar:



Click on the **name** and on the next screen, in the side panel to the left, verify that the **webinar date** and **join link** are populated:

The screenshot shows the subscriber profile page for 'july19+test@crazygoodtutorials.com'. A red arrow points to the 'DEMO WEBINAR DATE' field, which is populated with '2022-07-19T20:00:00-04:00'. Below it, the 'DEMO WEBINAR JOIN LINK' is also populated with a URL. The right side of the page shows the 'EMAIL HISTORY' tab, which is currently empty.

Confirmed

july19+test@crazygoodtutorials.com

EMAIL ADDRESS
july19+test@crazygoodtutorials.com

FIRST NAME
july 19

DEMO WEBINAR DATE
2022-07-19T20:00:00-04:00

DEMO WEBINAR JOIN LINK
https://event.demio.com/join/99w35TLVXl

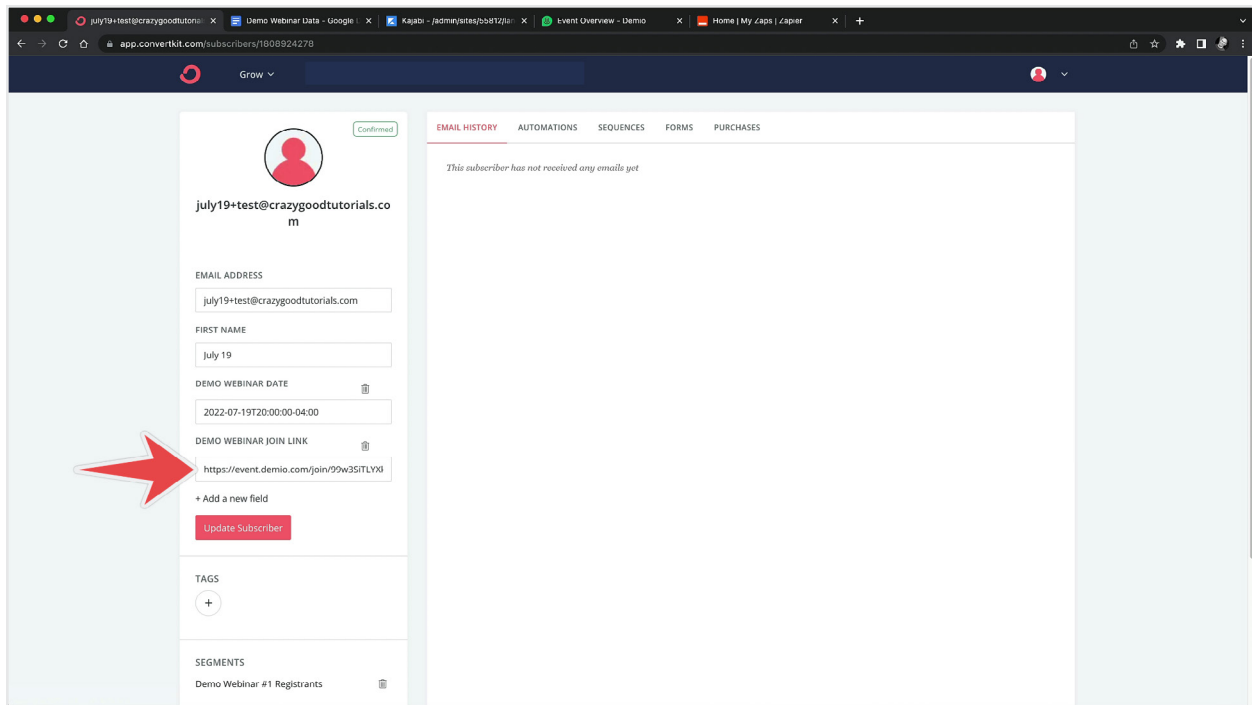
+ Add a new field

Update Subscriber

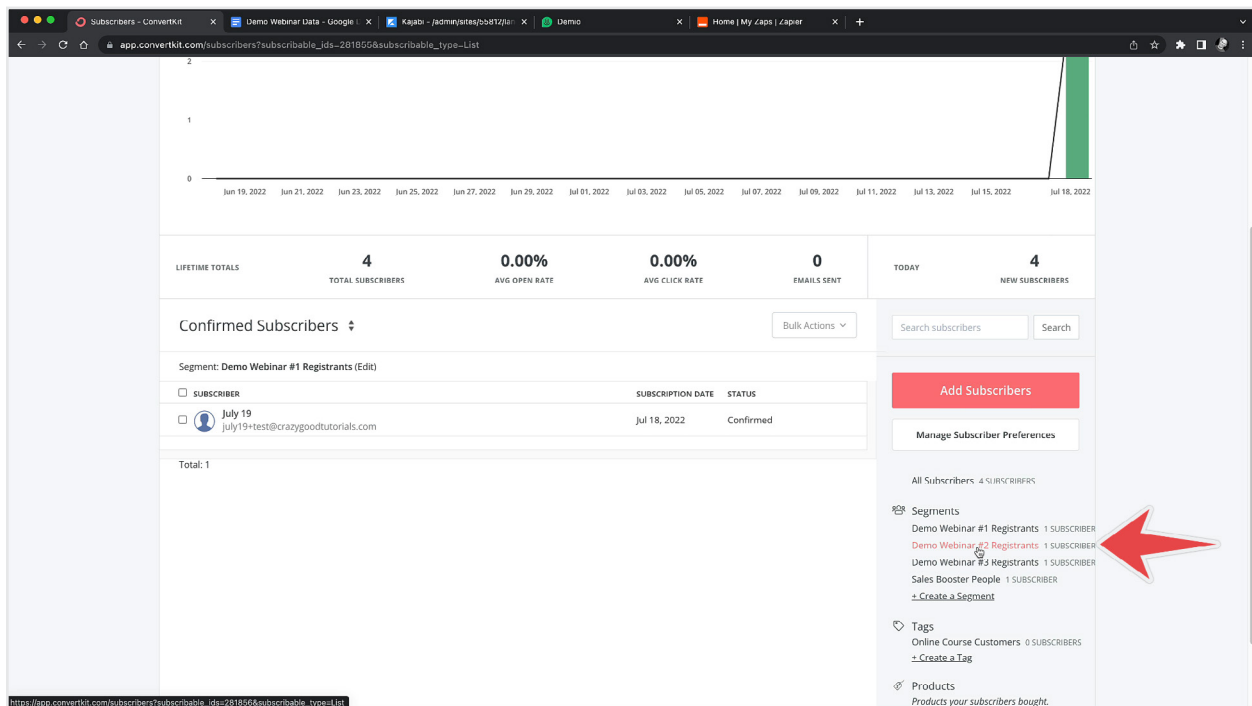
TAGS
+

SEGMENTS
Demo Webinar #1 Registrants

EMAIL HISTORY
This subscriber has not received any emails yet

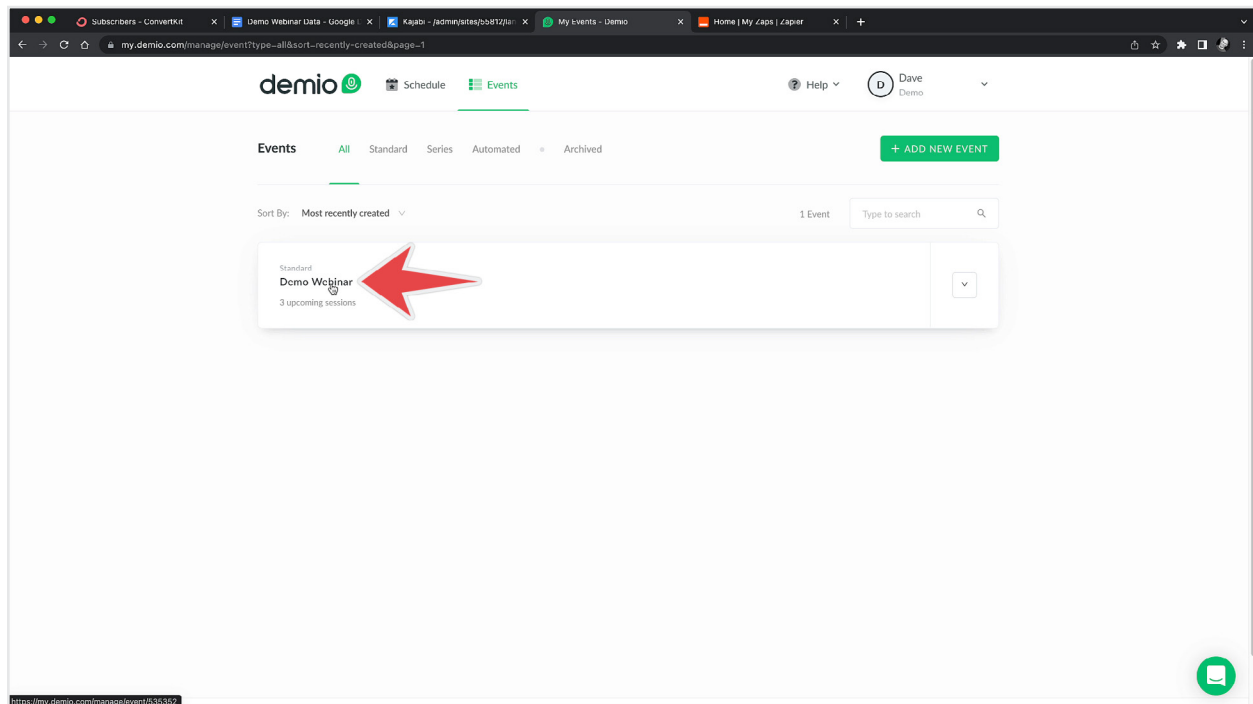
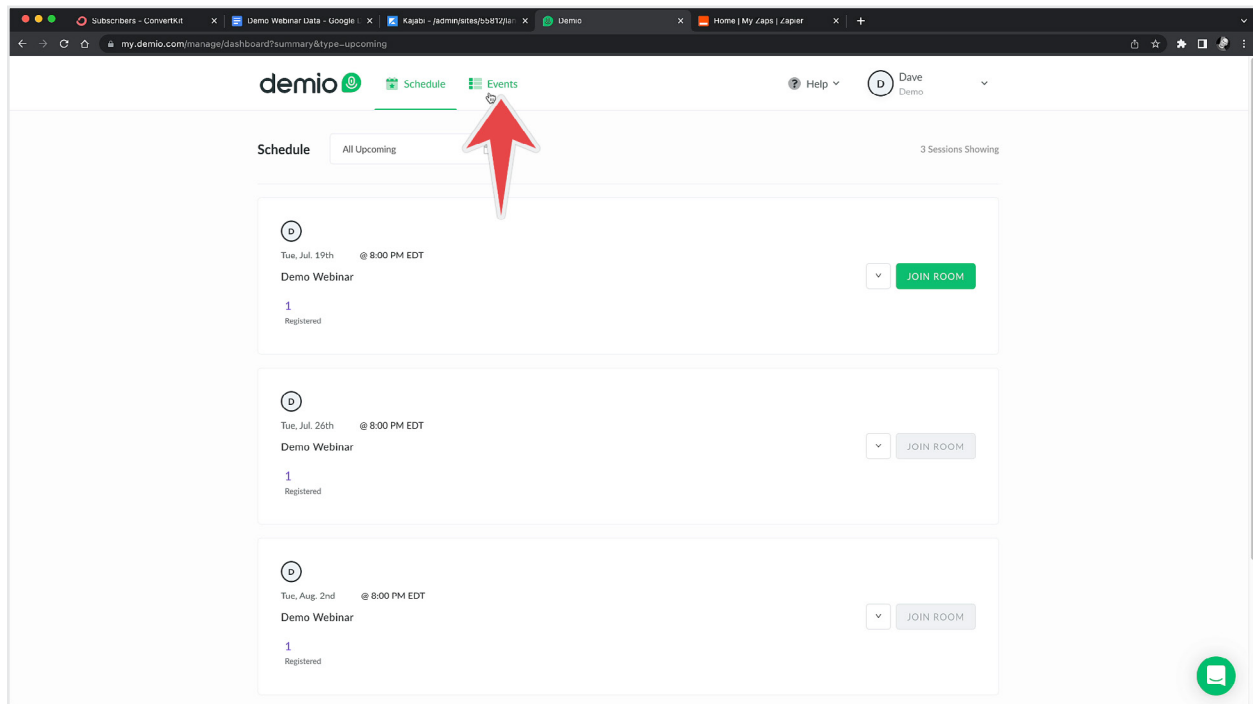


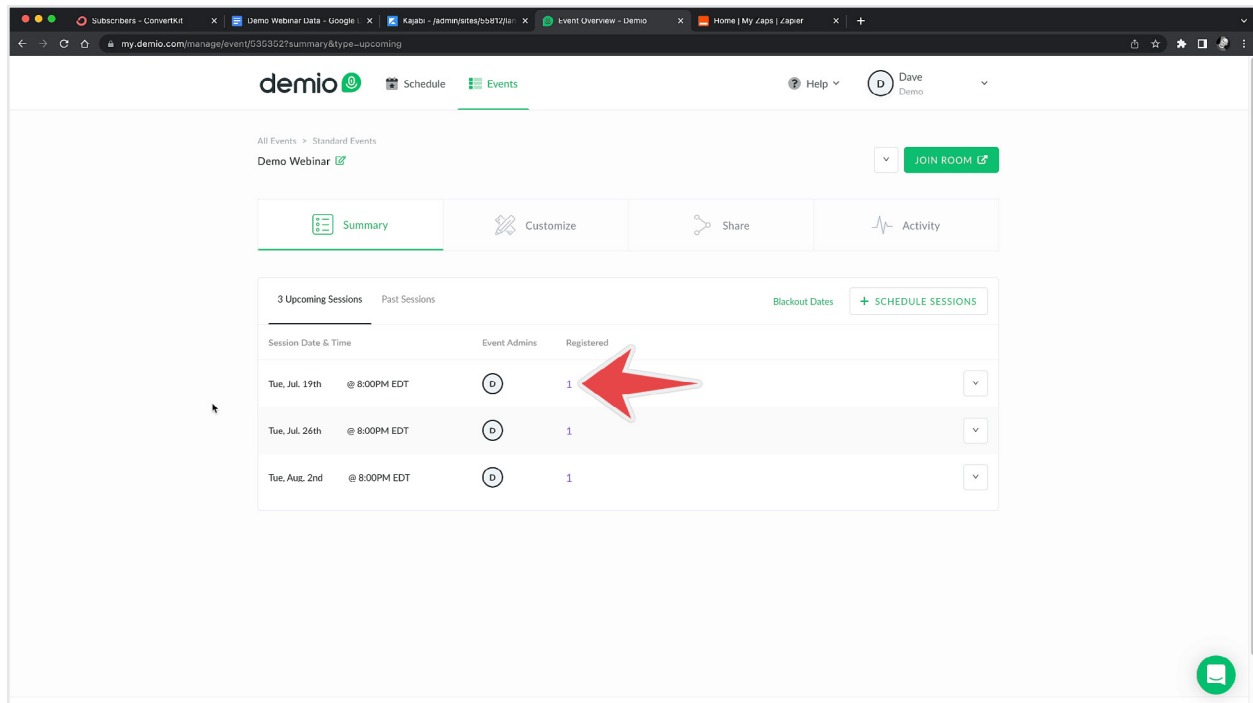
If everything looks good, that means all the work you did is working properly. Now go back to the **Segment** section and repeat this same exact process for the remaining segments:



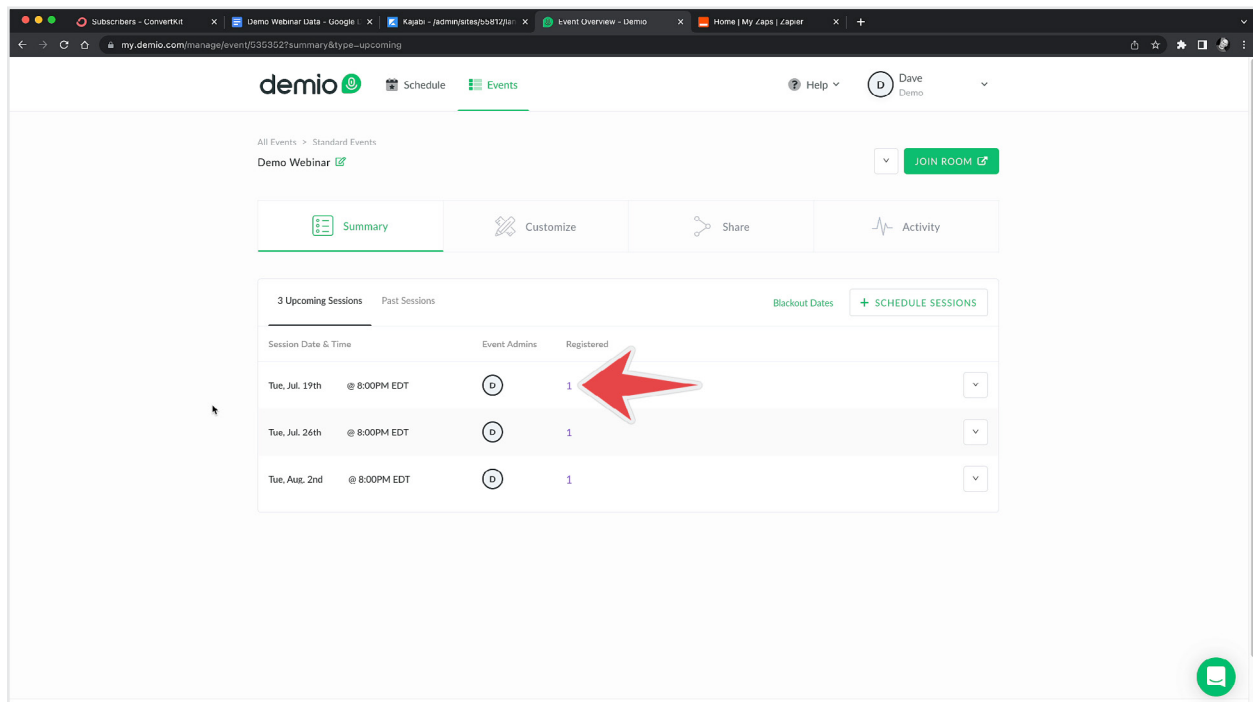
Once you've verified that everything is correct for your segments, you're done in ConvertKit. Now you'll verify everything is correct in Demio..

Go into Demio and click on **Events**, click on your **webinar** and you should see one person registered for each of your webinar dates:



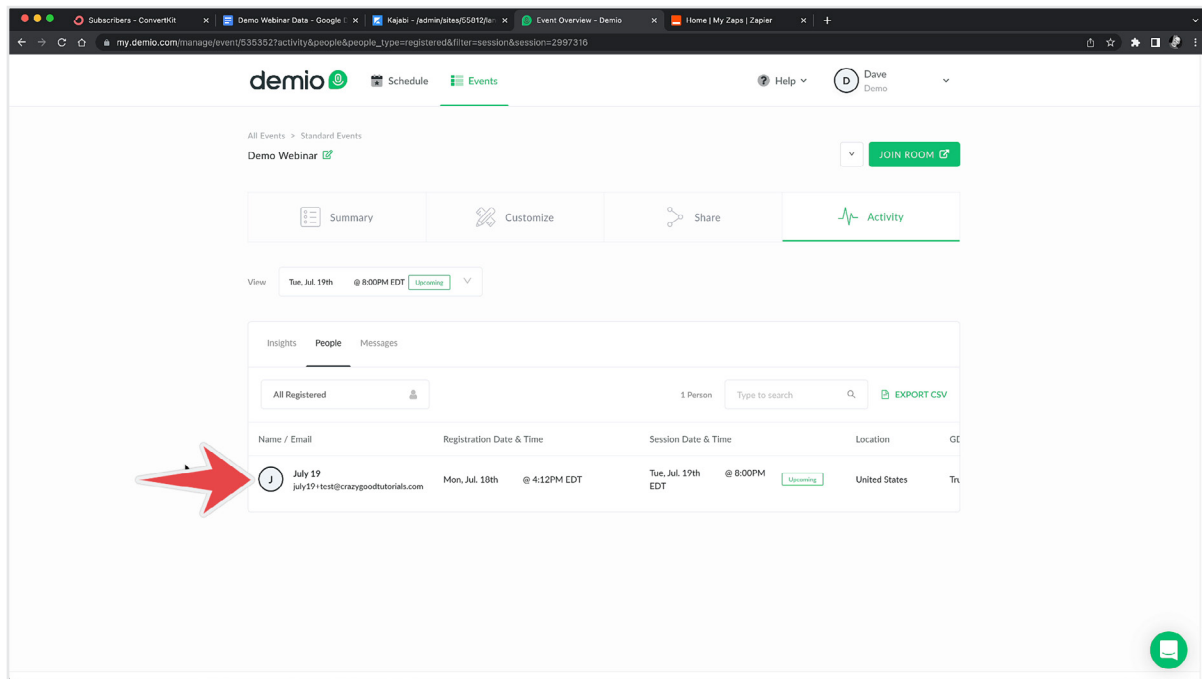


Under the Registered column, click on the number for your first webinar:



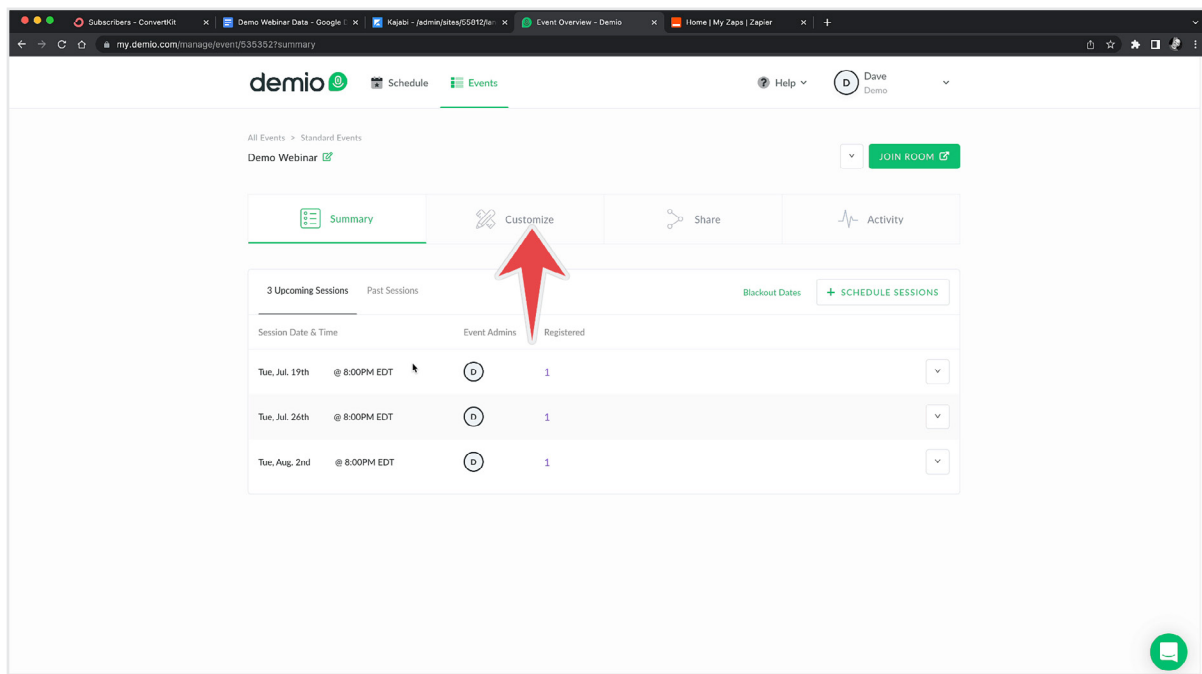
T

he **name** and **email address** that is registered should contain text that matches the date of your webinar:

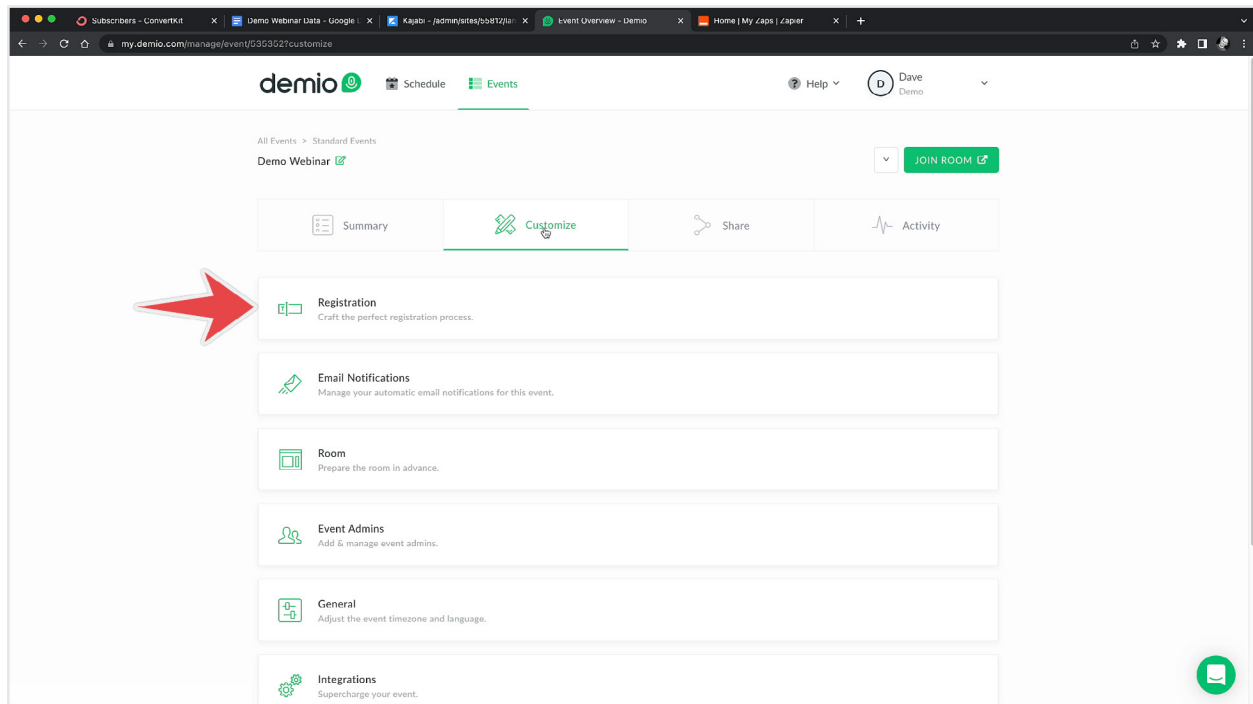


Repeat this same exact same process for the remaining two webinars, verifying that everything matches.

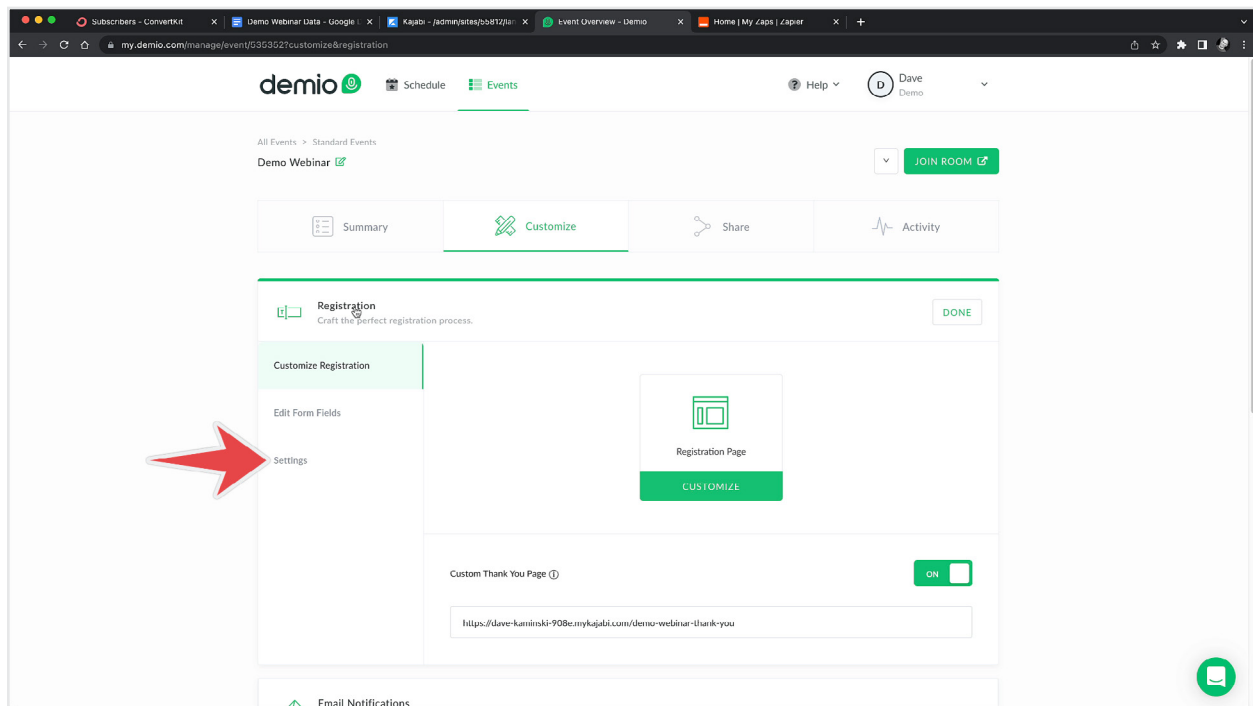
Now finally, there's one more thing that you need to do in Demio. Go up and click on the **Customize** tab:



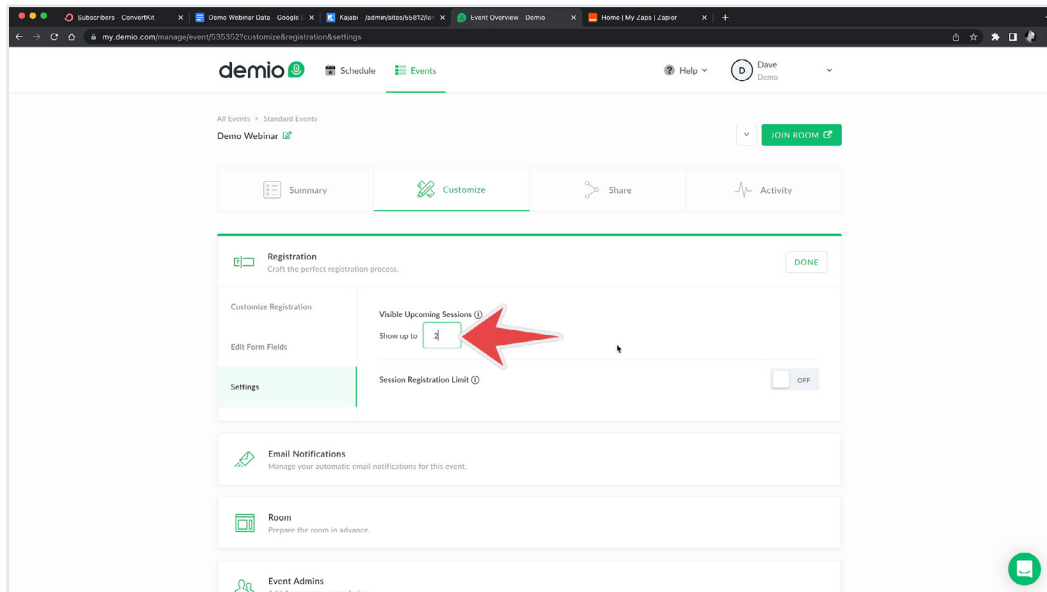
Then go down and click on the **Registration** block:



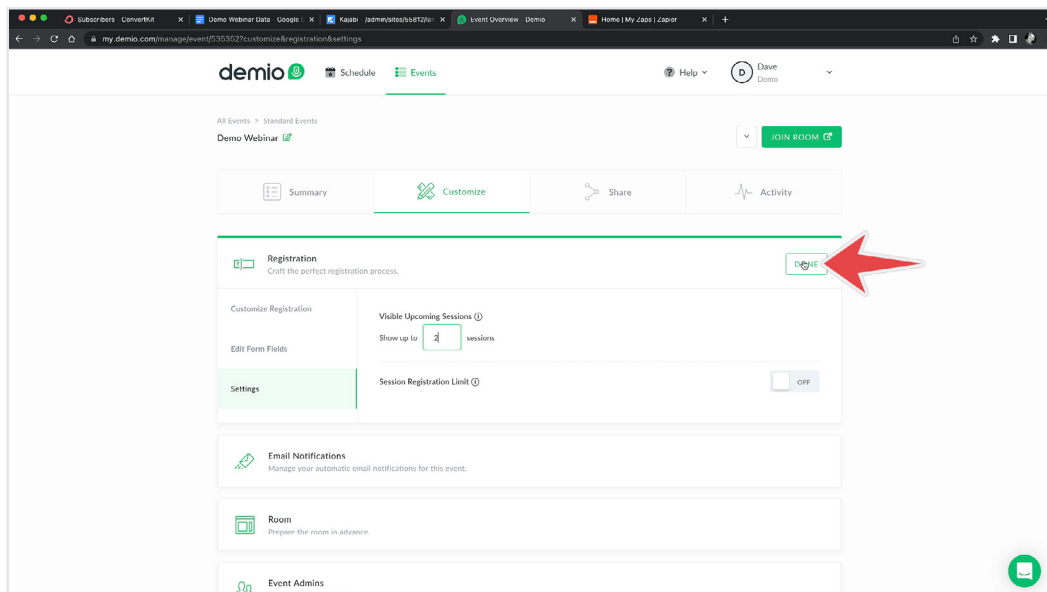
Then click on **Settings**:



Remember that when you started testing, there were three webinars listed in that dropdown box on your webinar registration page. But Amy recommends that you only display the two soonest webinars in that dropdown. So to accomplish this, go over here to the **Visible Upcoming Sessions** option and change it to **2**:



Then go over and click on **Done**:



And that's it! Congratulations, you have successfully integrated Demio with ConvertKit and Kajabi so data about your webinars will be shared between them. There's only one step left. And in Step 3, you'll learn how to set up and send your marketing related emails in ConvertKit.

STEP 3

Setting Up Your Pre-Webinar, Post-Webinar and Sales Booster Emails Using Kajabi As Your Email Provider

In **Step 3**, you will be learning how to use Kajabi to set up and send all of the emails for your live webinar course launch.

With Amy's framework, there will be many emails being sent to different groups of people. For example, there will be pre-webinar emails, post-webinar emails and sales booster emails.

Some emails will be sent to your first webinar registrants, some to registrants of your second webinar and some to people who never even registered for any of your webinars. It will be a lot of emails, but just relax and follow along with this guide.

You also need to be aware of how emails will be sent, as it can happen in two different ways.

First, you have **automated sequences**. This is where an email is automatically sent based on a trigger. For example, you visit a website, you see a popup, you enter your email address and then you magically receive an email. That's an automated sequence. You are going to use an automated sequence for only one email in Amy's framework. And that will be the **welcome email** sent after someone registers for a webinar.

All other emails will be sent by **broadcast**. A broadcast is an email that is only sent one time to a specific group of people. It is sent at the exact date and time you want to send it.

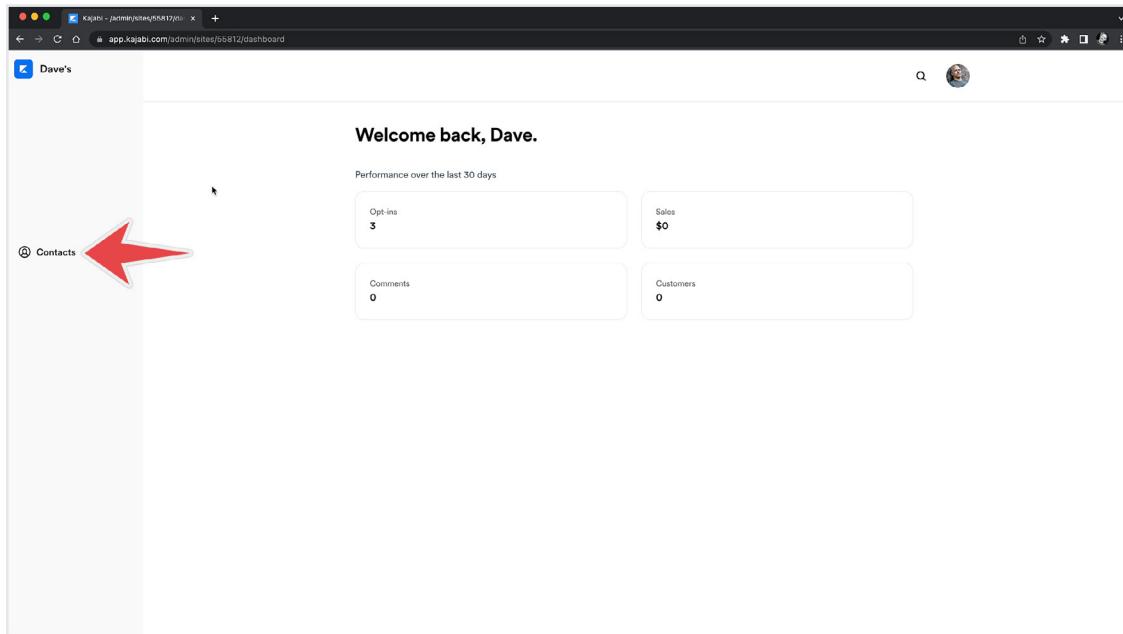
Then there's Demio, who will be sending your registrants reminder emails with the webinar link on the days of your webinar. These emails are not sent through Kajabi, so you don't need to worry about them.

In this guide, I won't be showing you how to do each and every email in Amy's framework. Instead, I'll be showing you the process to use for one email, which you can then repeat for all the others.

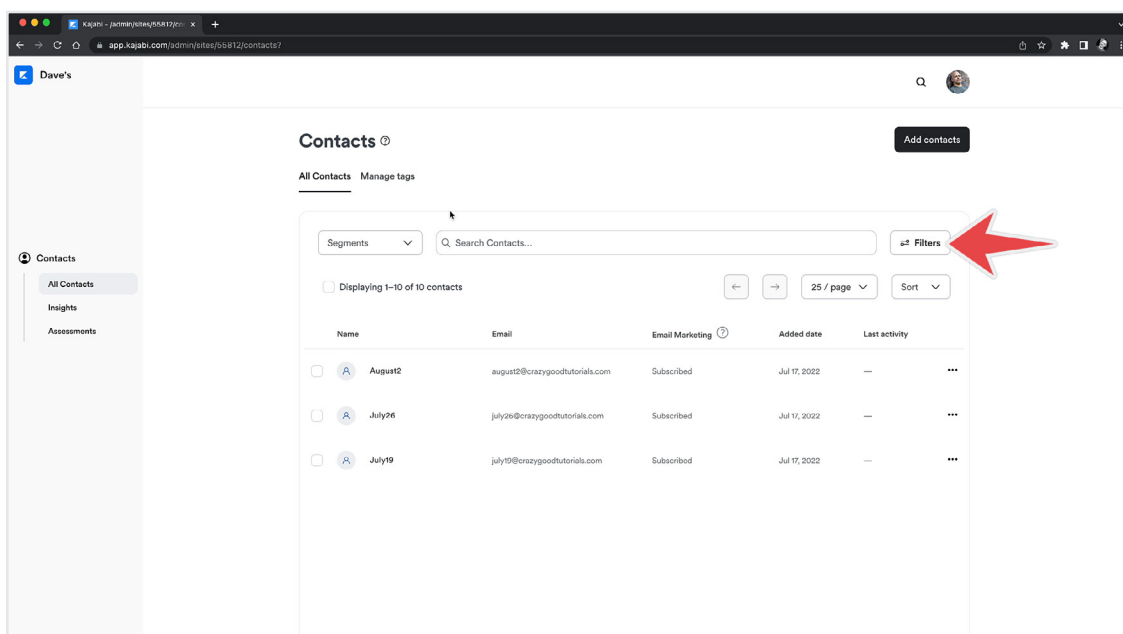
The first thing you need to do in Kajabi is set up **segments** for your emails.

Think of segments like buckets. Let's say that you want to send an email only to the people who registered for your first webinar. You need a way to identify those people. And a segment is how you're going to identify them. You're going to put everyone who registered for that first webinar in their own separate bucket. And then you'll do the same thing for all of your remaining webinars and your sales booster people.

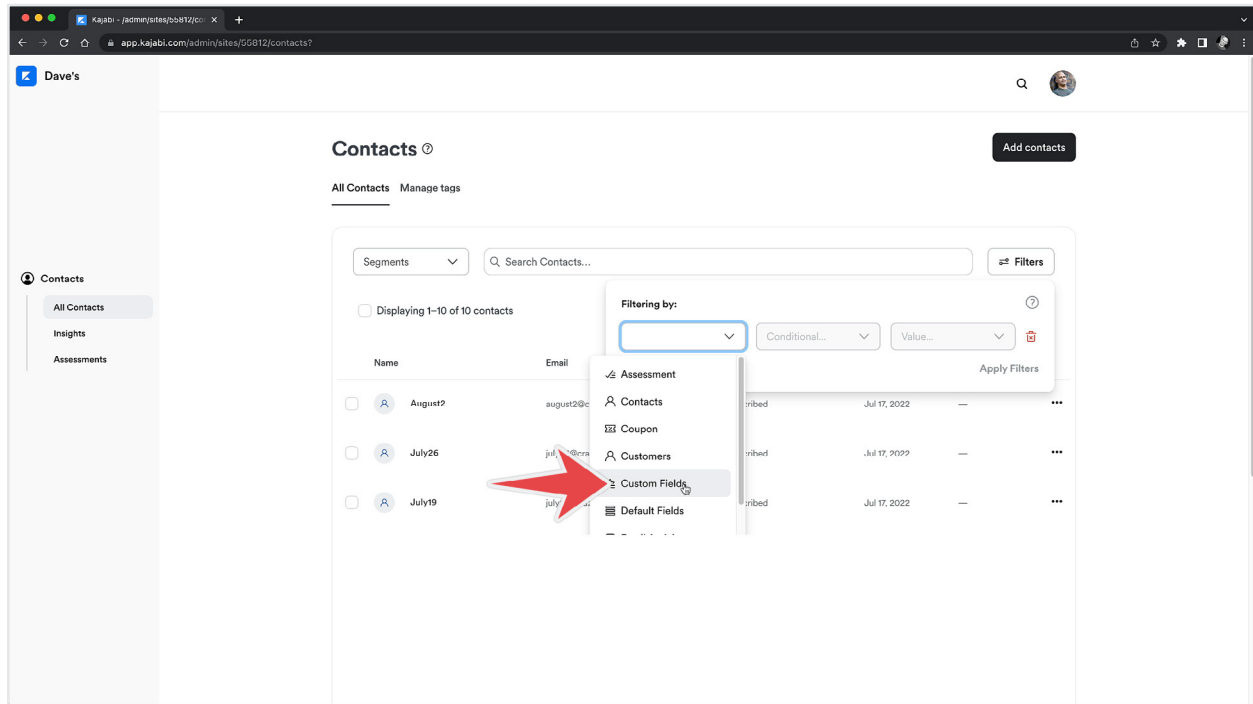
To do this, go to the panel to the left and click on **Contacts**:



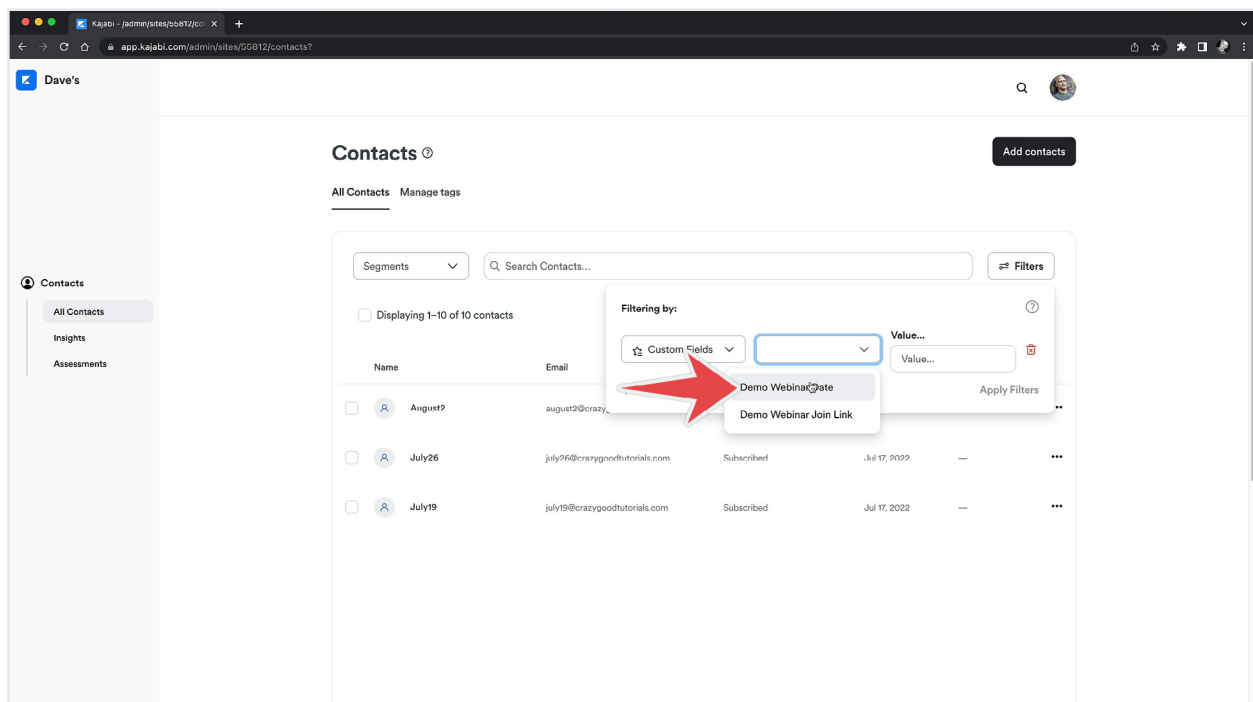
Then go over and click on **Filters**:



In the dialogue that appears, go to the first dropdown, click then choose **Custom Fields**:

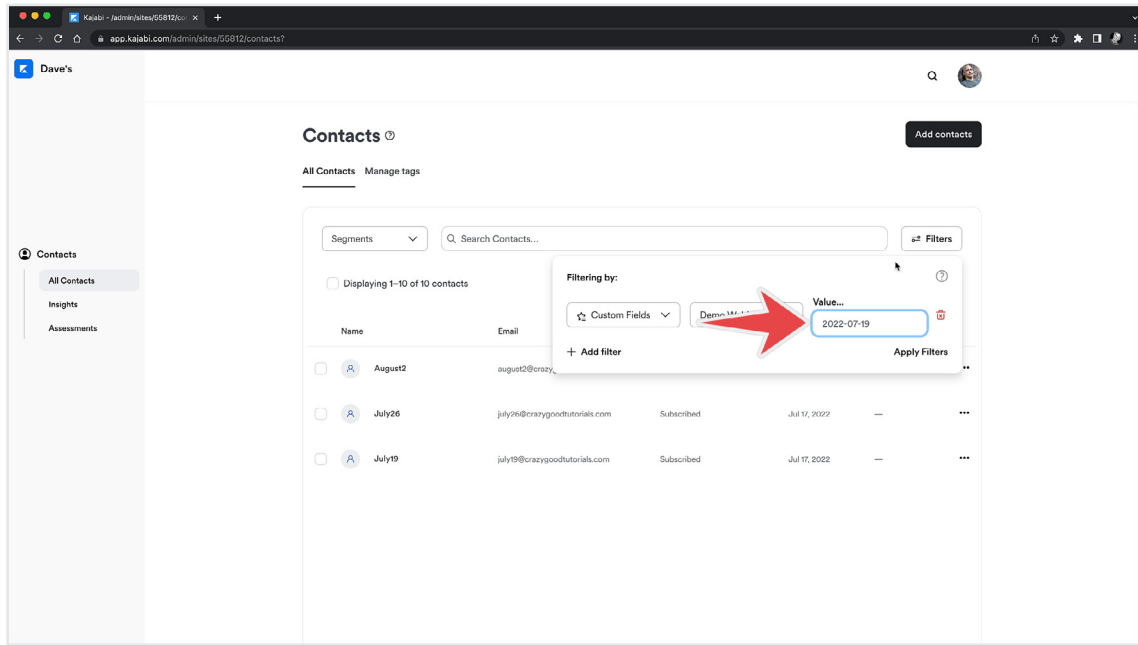


For the next dropdown, click and this is where you'll see your custom fields for the **webinar date** and the **webinar join link**. Select the field for the **webinar date**:



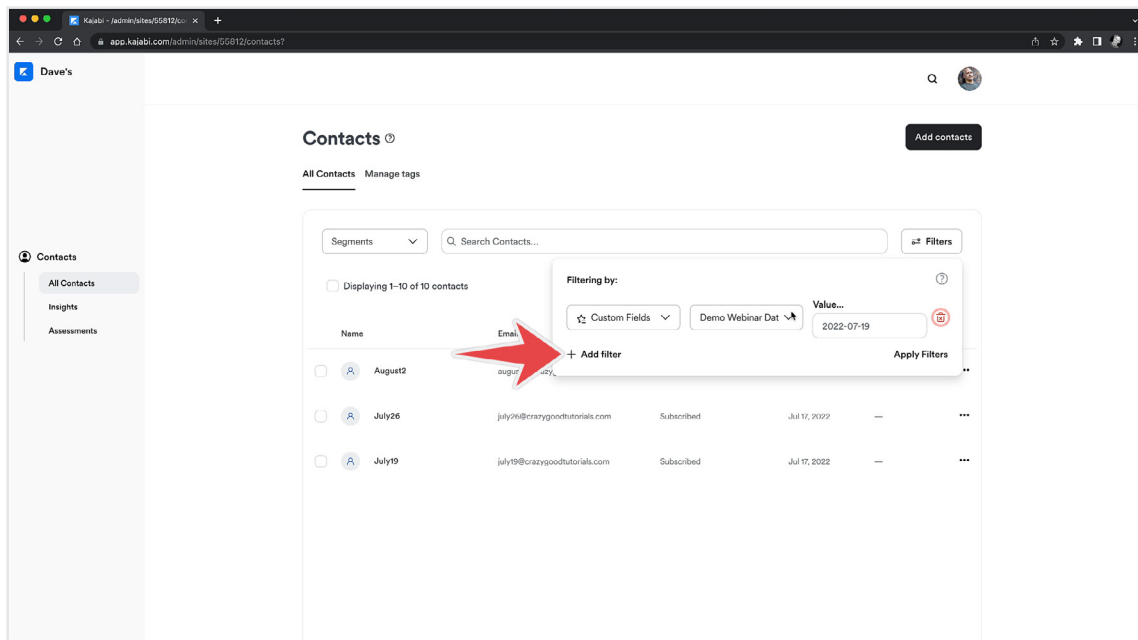
For the next dropdown labeled **value**, you need to enter a date value in a specific format of **yyyy-mm-dd**.

In this example, I'm creating a segment for my first webinar registrants and the webinar is on July 19th:

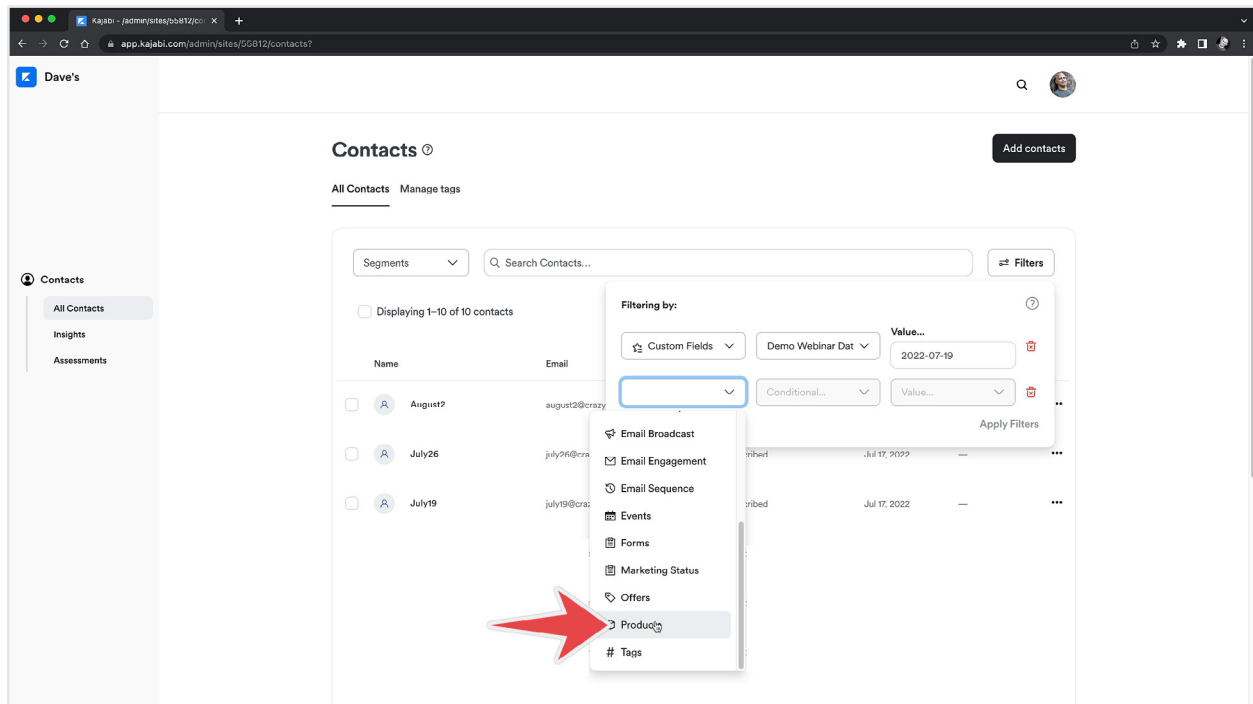


But you're not done yet. You also want to exclude anyone who has already purchased your course.

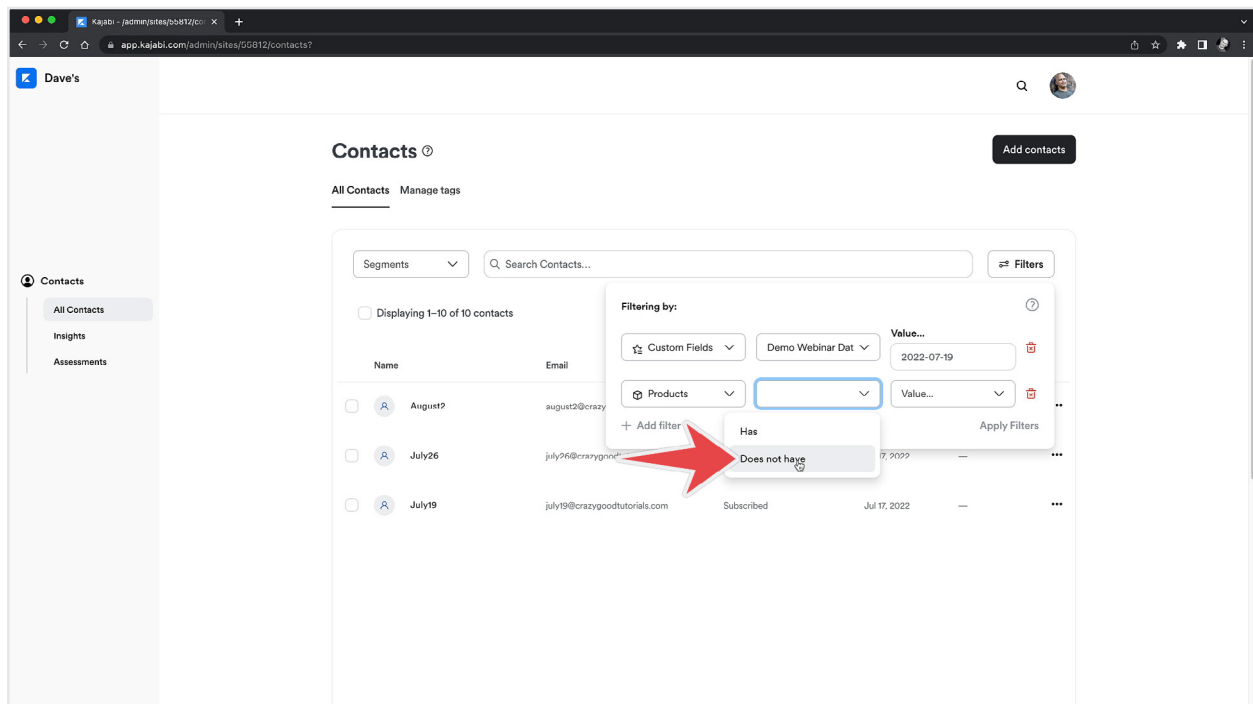
To do that, click on, **Add Filter**:



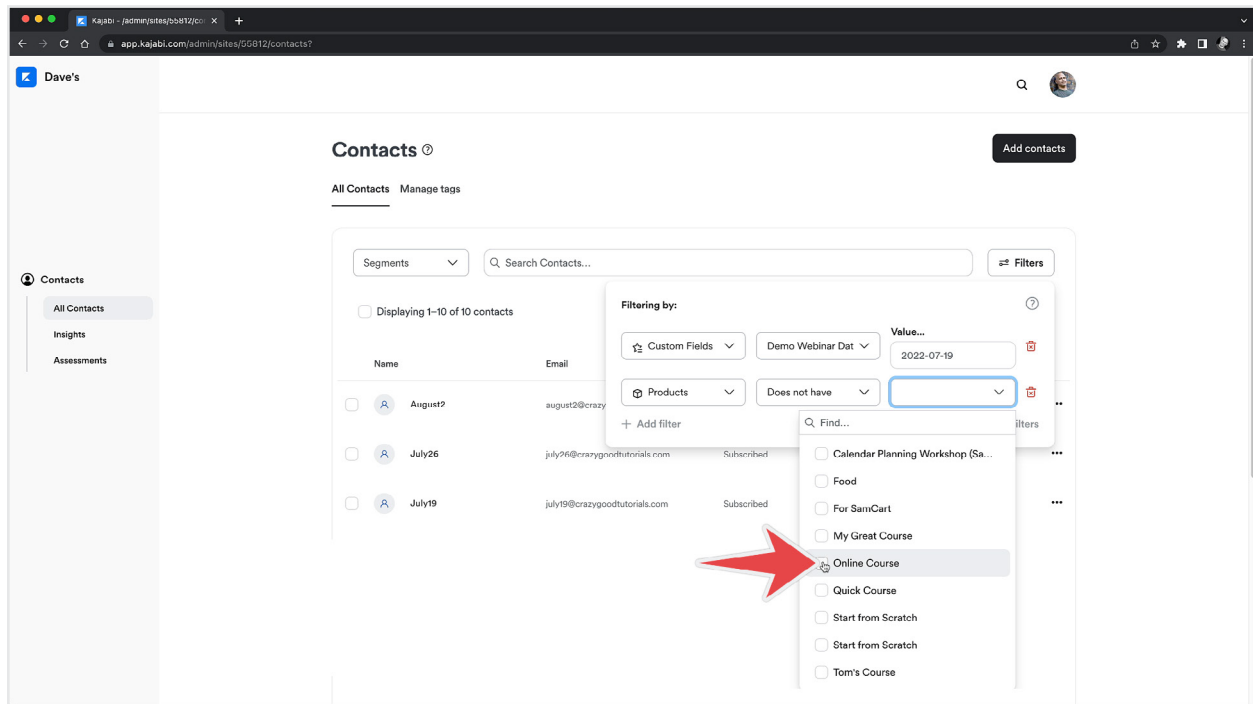
In the first dropdown, select **Products**:



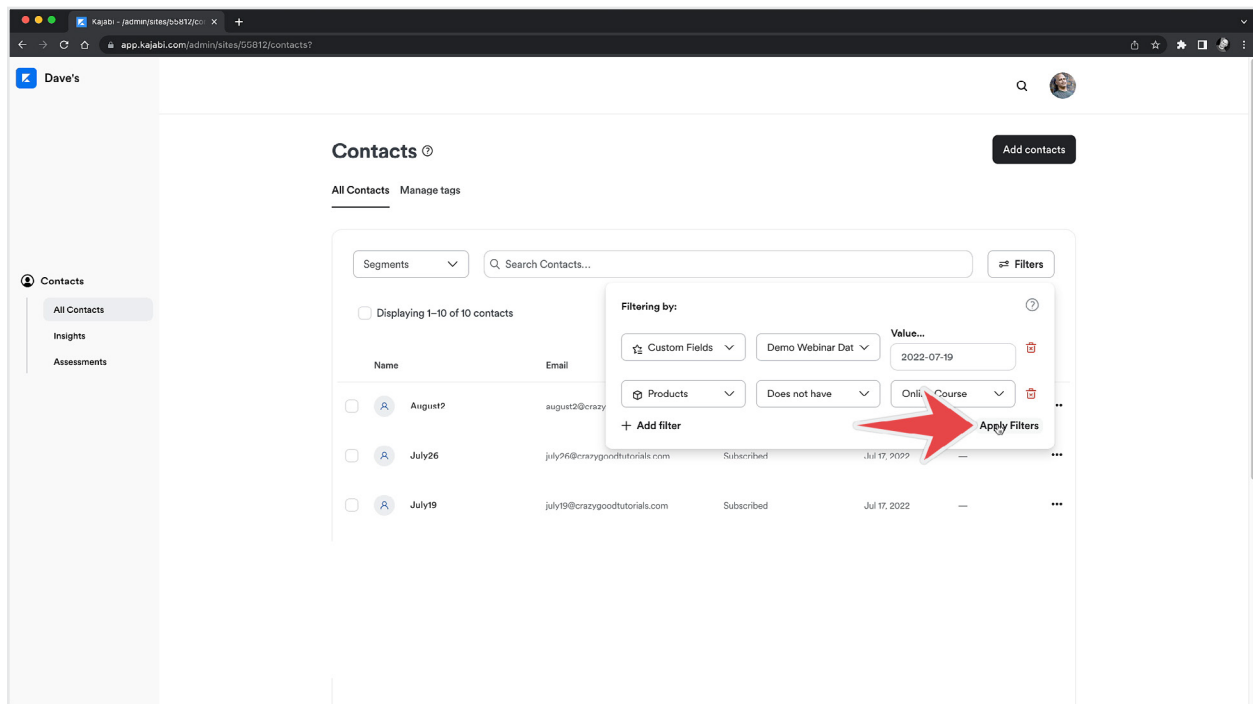
For the second dropdown, select **Does Not Have**:



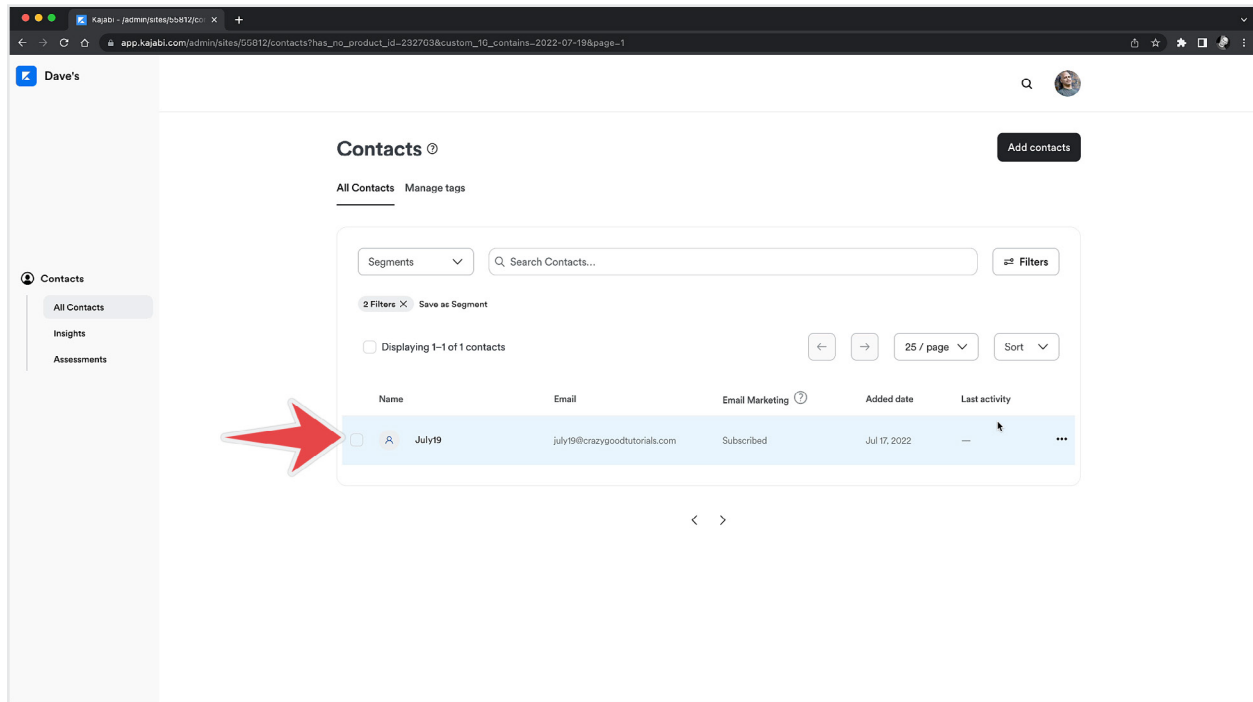
And for the third dropdown, select your course:



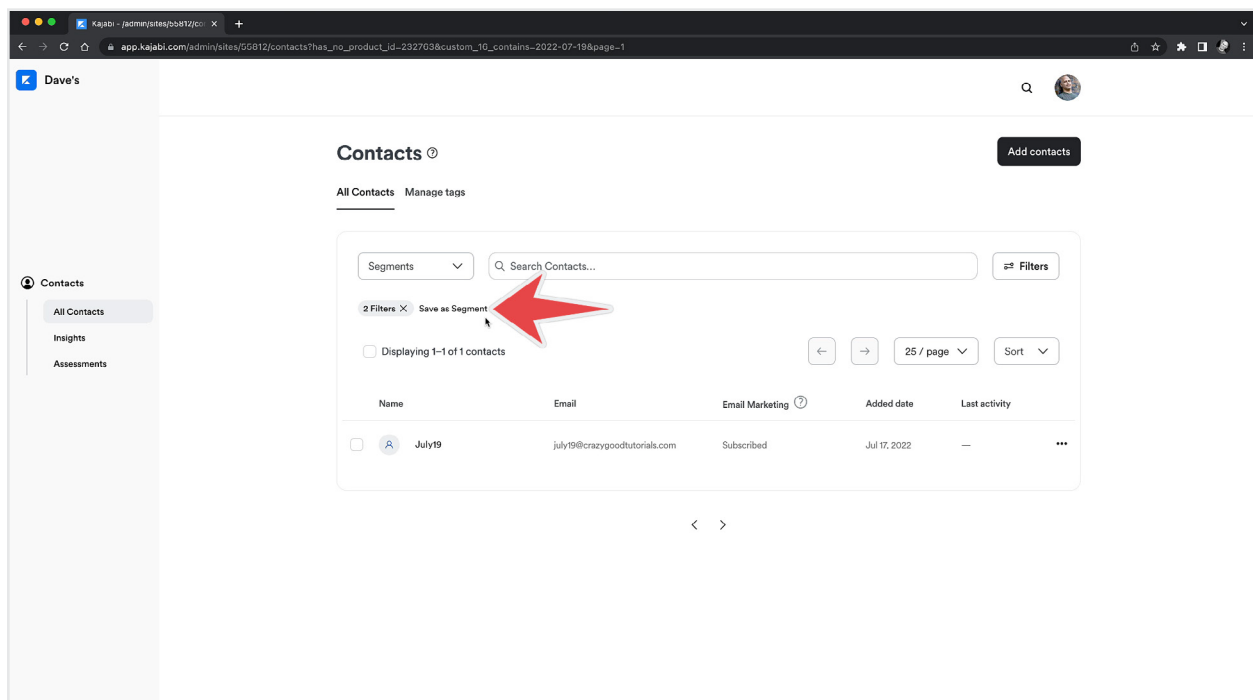
Then click **Apply Filters**:



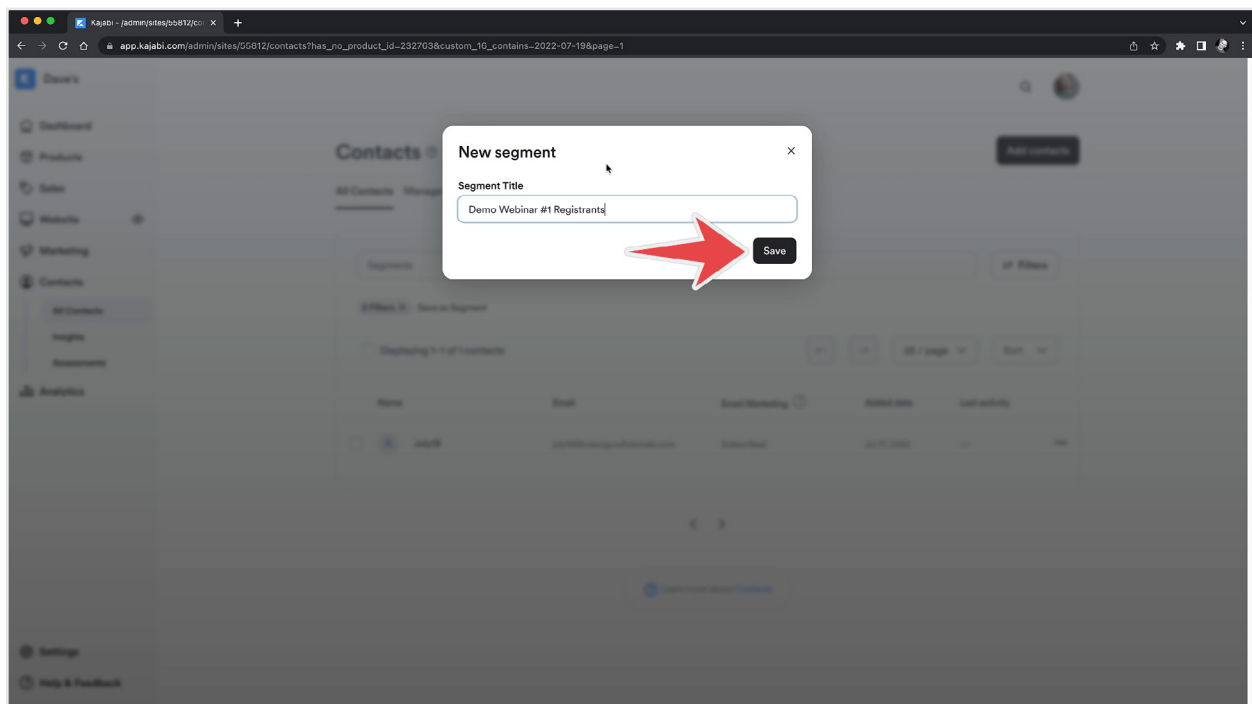
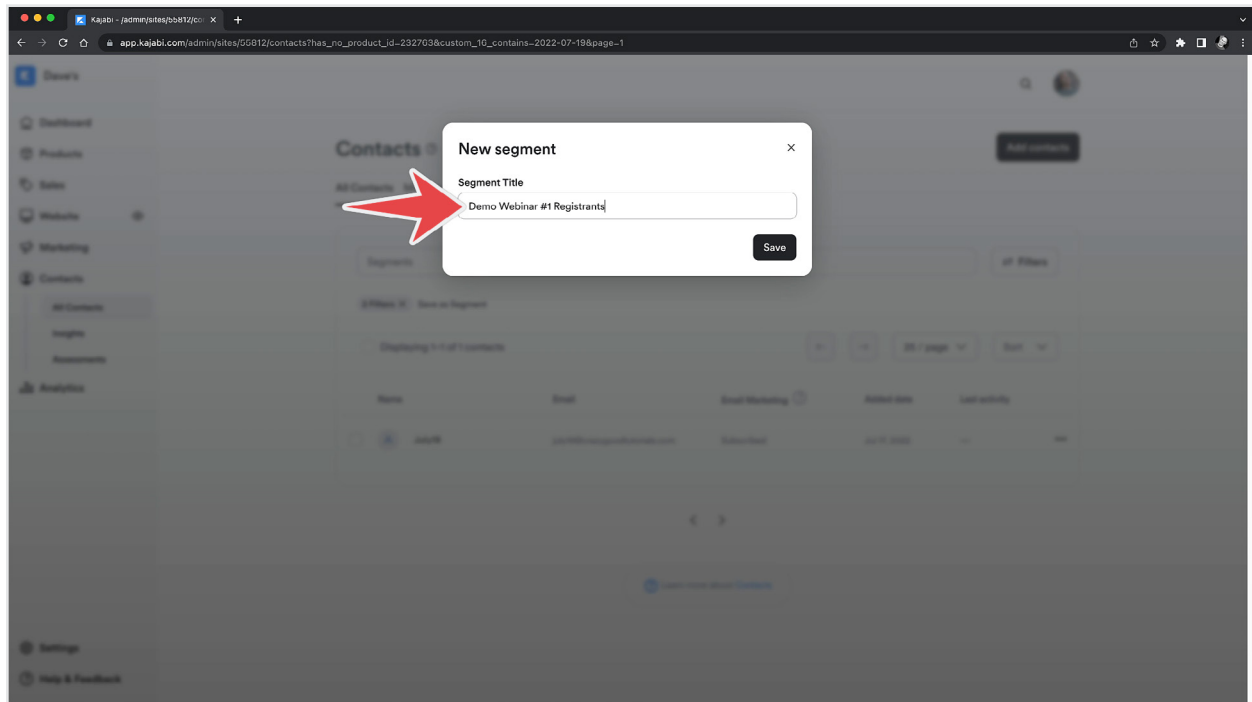
In this example, Kajabi is saying they found one person who matched this criteria. And it's that one fake email address that I entered when I was testing my integration. In other words, this segment is working perfectly:



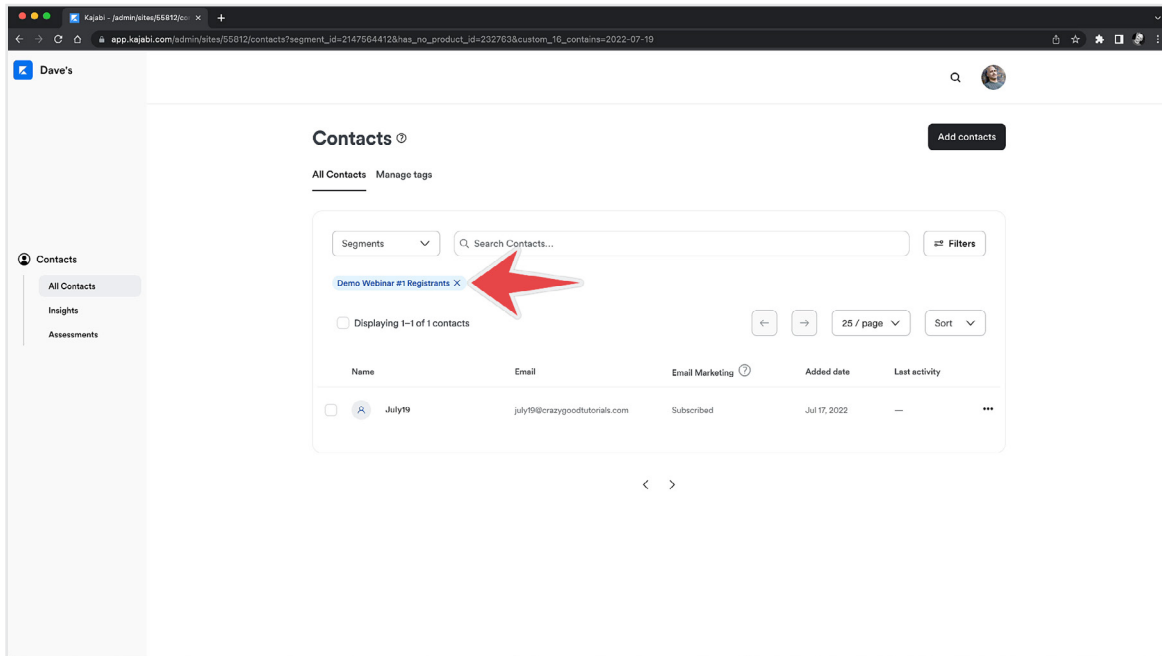
Now you need to save this permanently as a segment. To do that, click **Save as Segment**:



Enter a name that makes sense to you. In this example, this is my first webinar in my series, so I name it Demo Webinar #1 Registrants and then I'll click on **Save**:

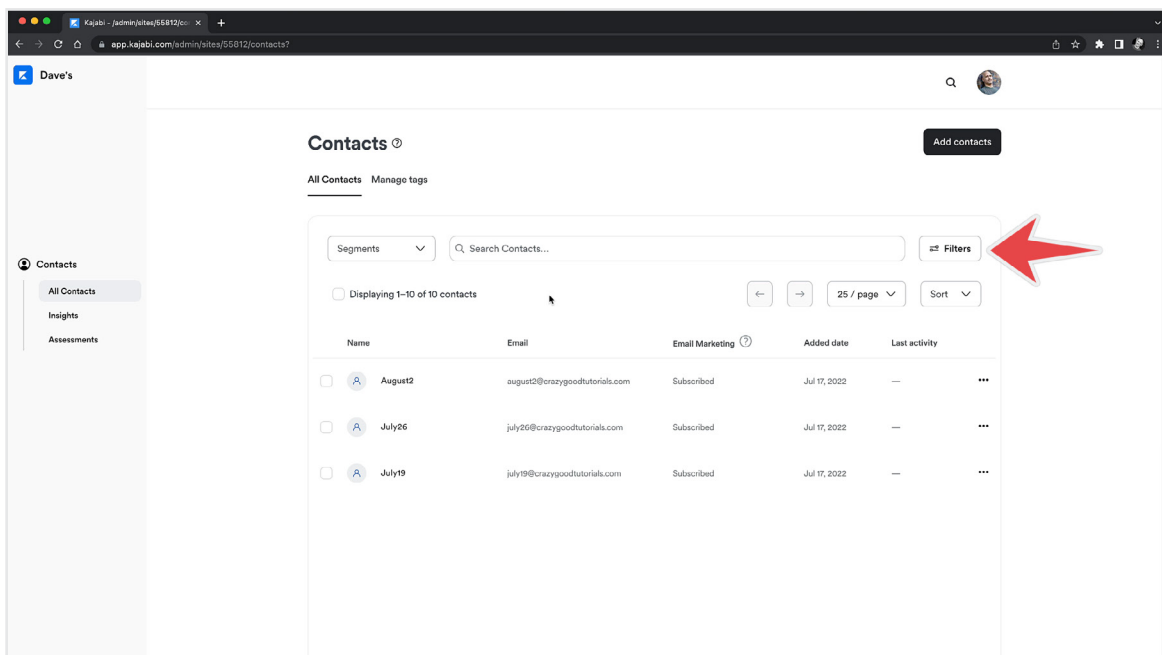


Now you need to repeat this same exact process for your remaining two webinars. But before doing that, make sure to remove the current filter:

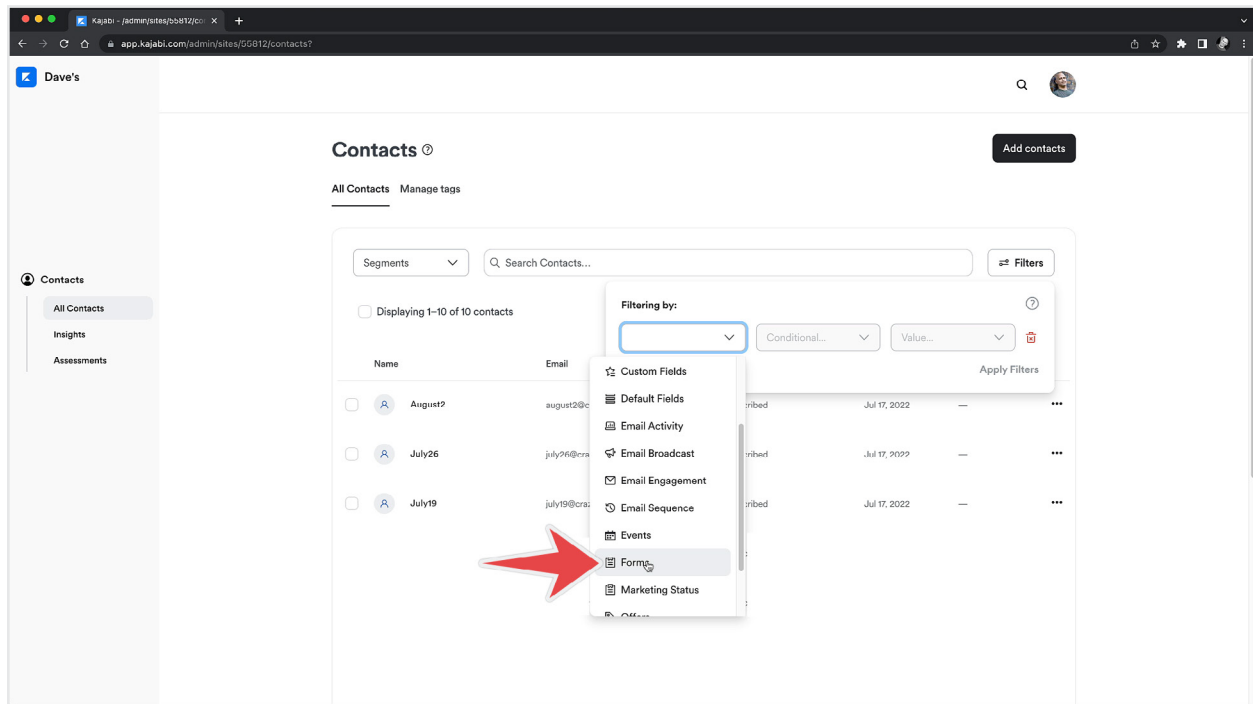


After you've finished creating the three segments for your webinar registrants, you need to create a fourth segment. This is your **Sales Booster** segment. It's for everyone that you told about your webinars, but they never registered for any webinar and never purchased your course.

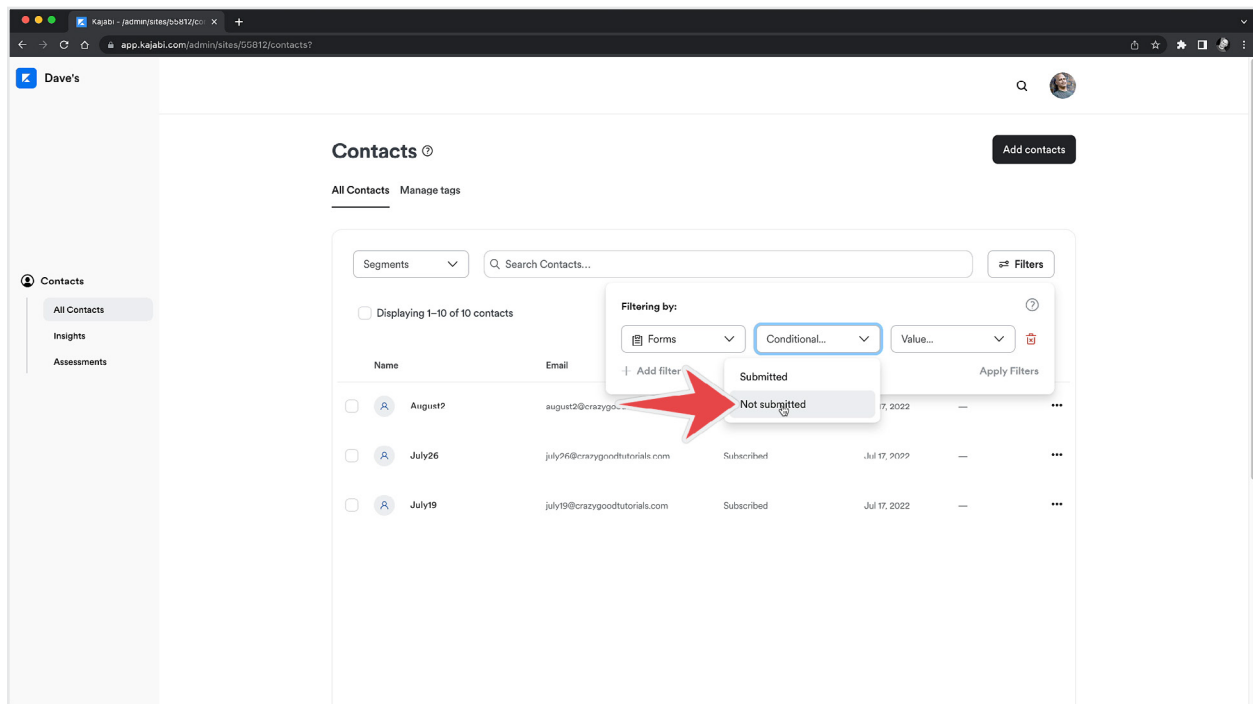
To do this, click on **Filters**:



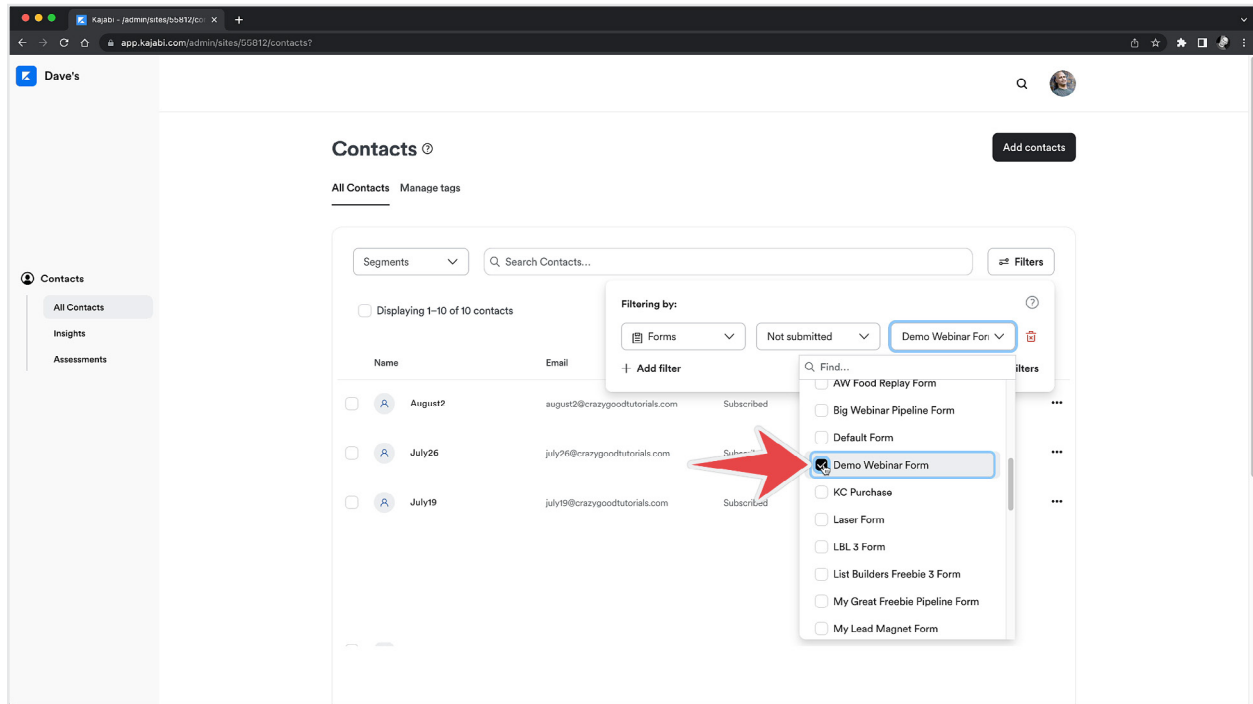
For the first dropdown select **Forms**:



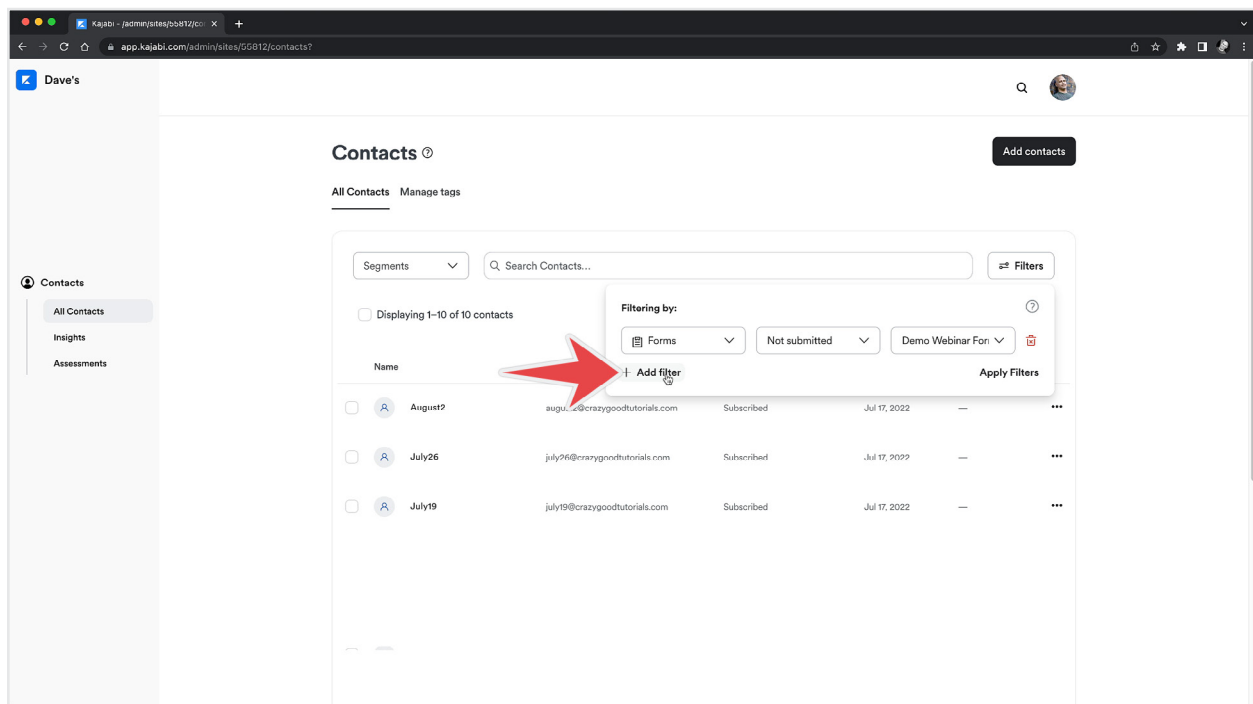
For the second dropdown select **Not Submitted**:



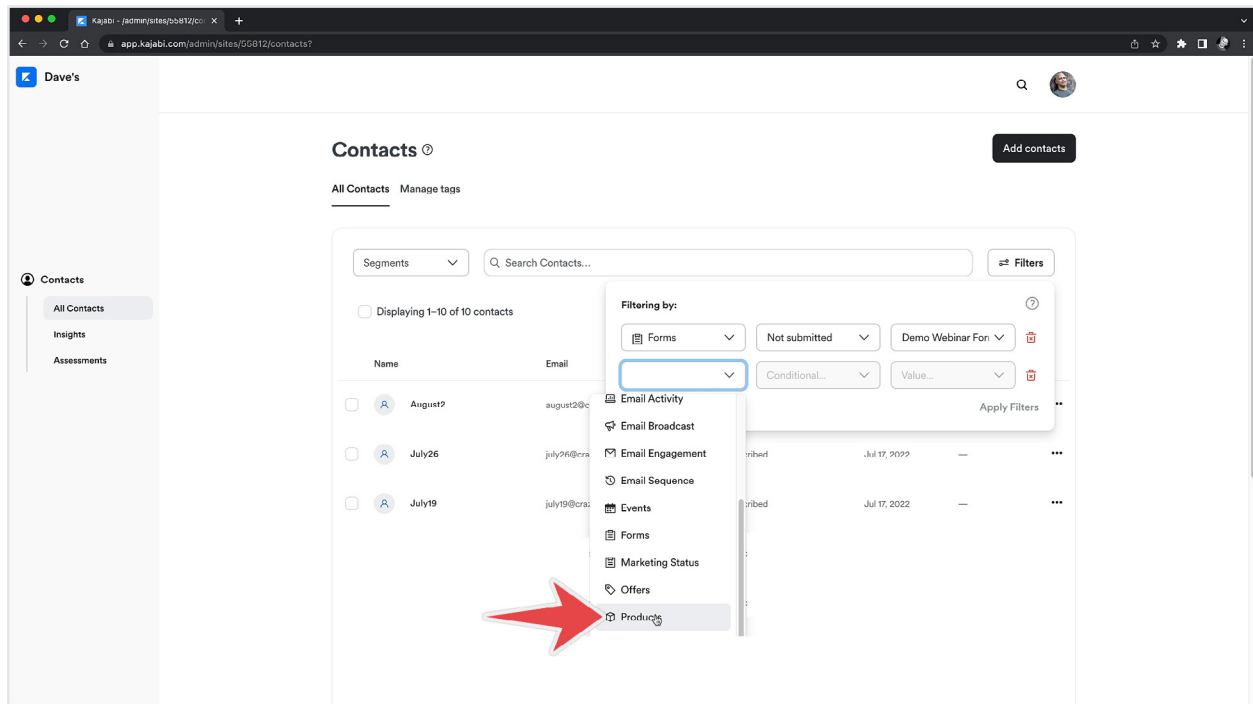
And then for the third dropdown, select the form for your webinar funnel that Kajabi created automatically when you created your webinar funnel:



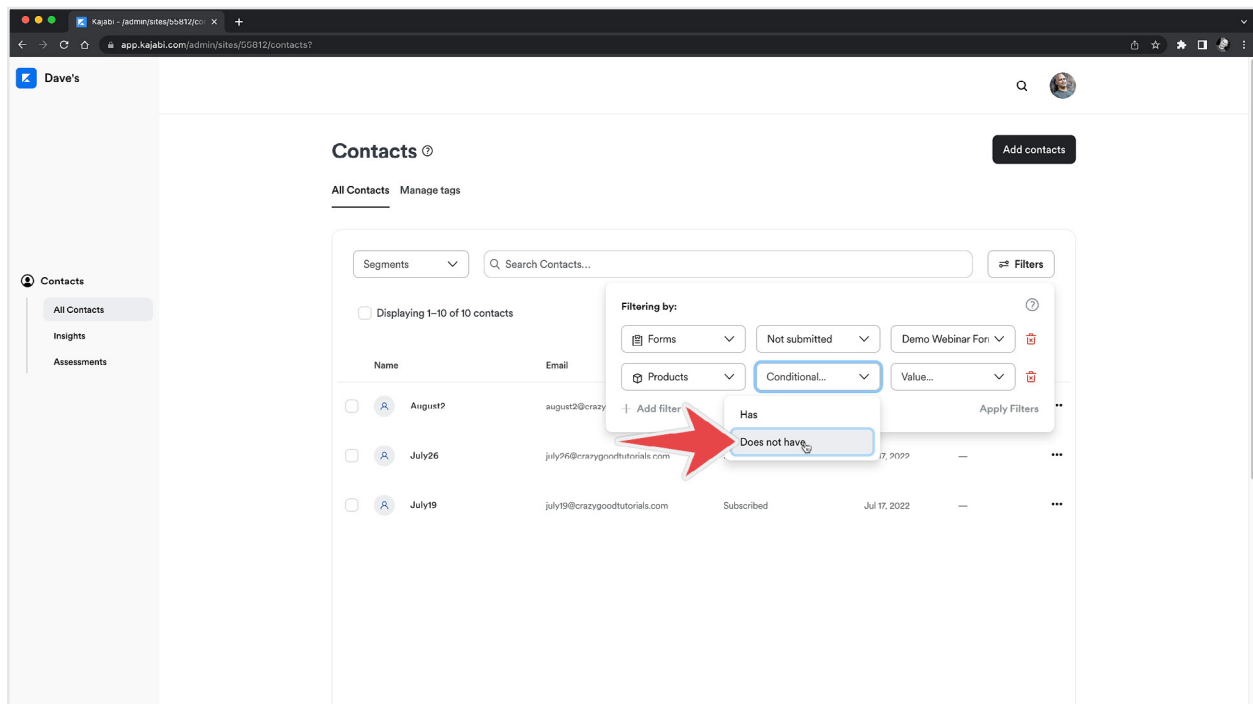
Now you need to add that additional filter for people who haven't purchased your course. Click on **Add Filter**:



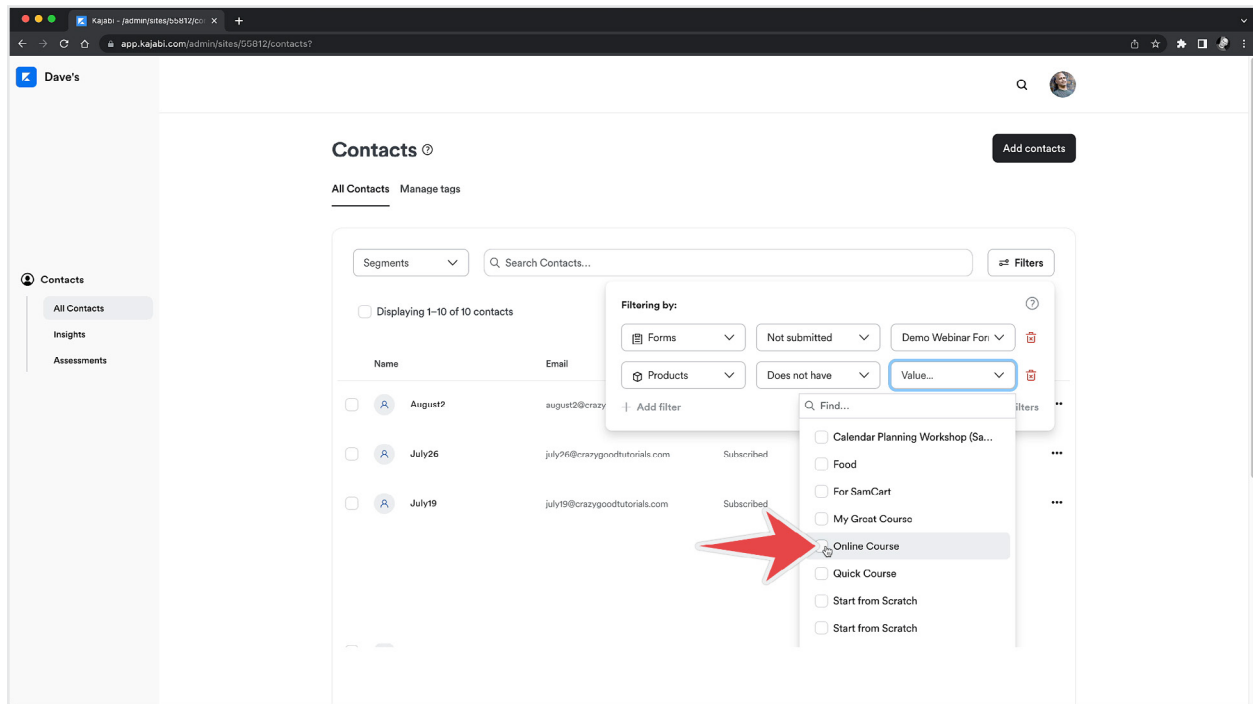
In the first dropdown select **Products**:



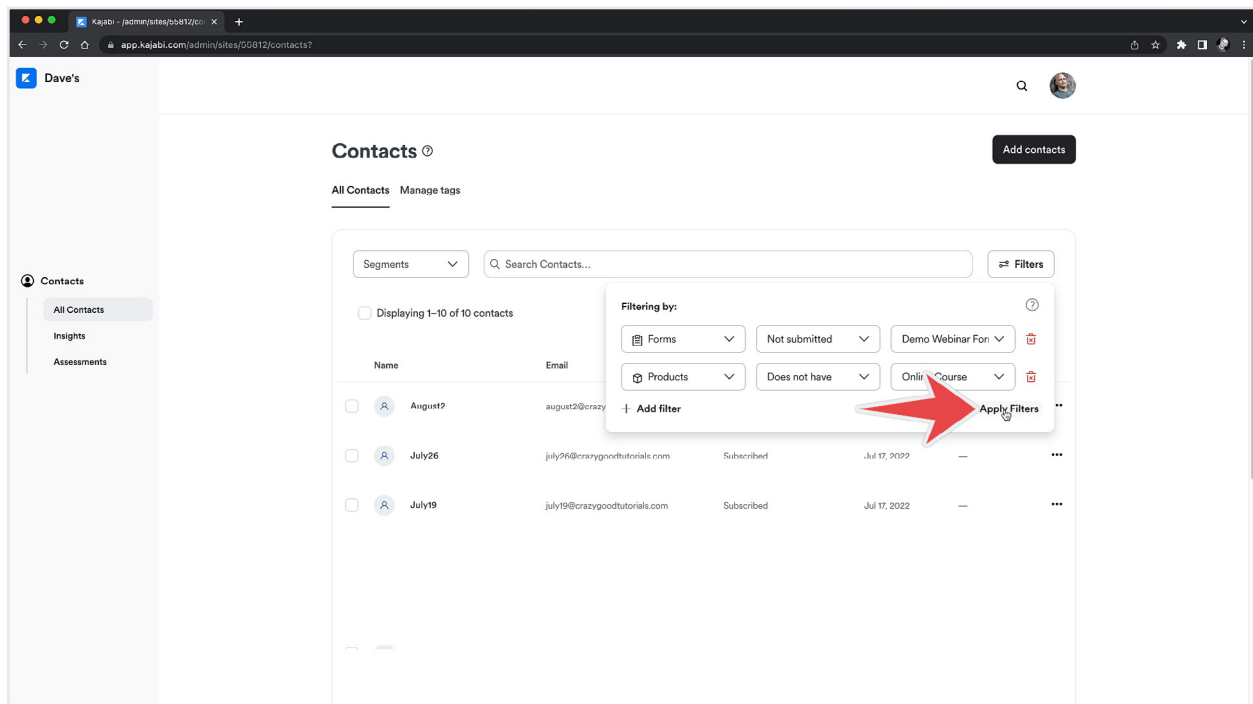
For the second dropdown, select **Does Not Have**:



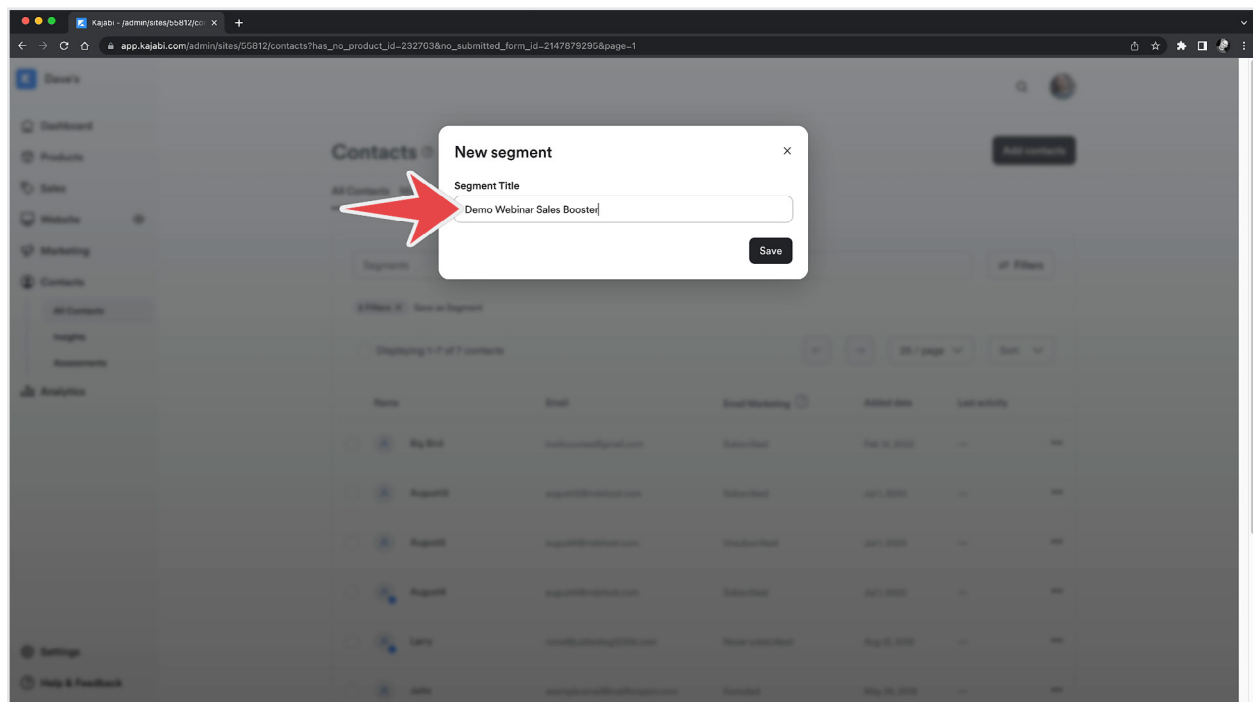
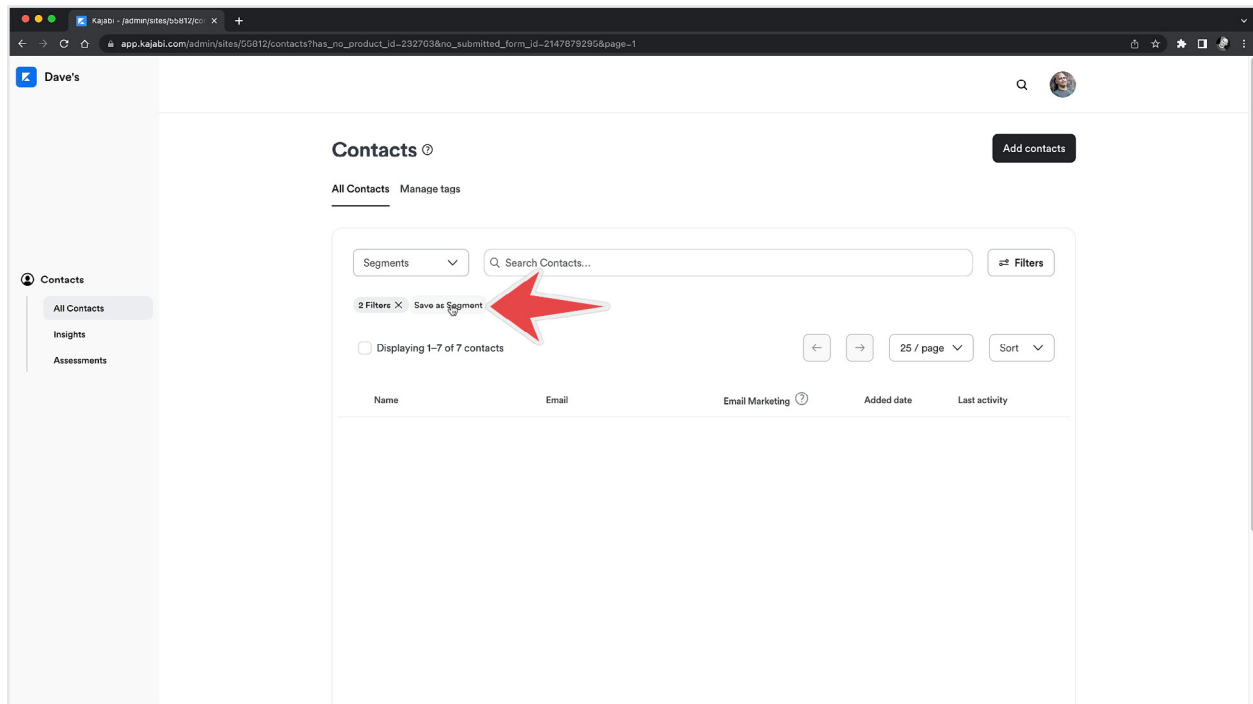
And for the third dropdown, select your course:

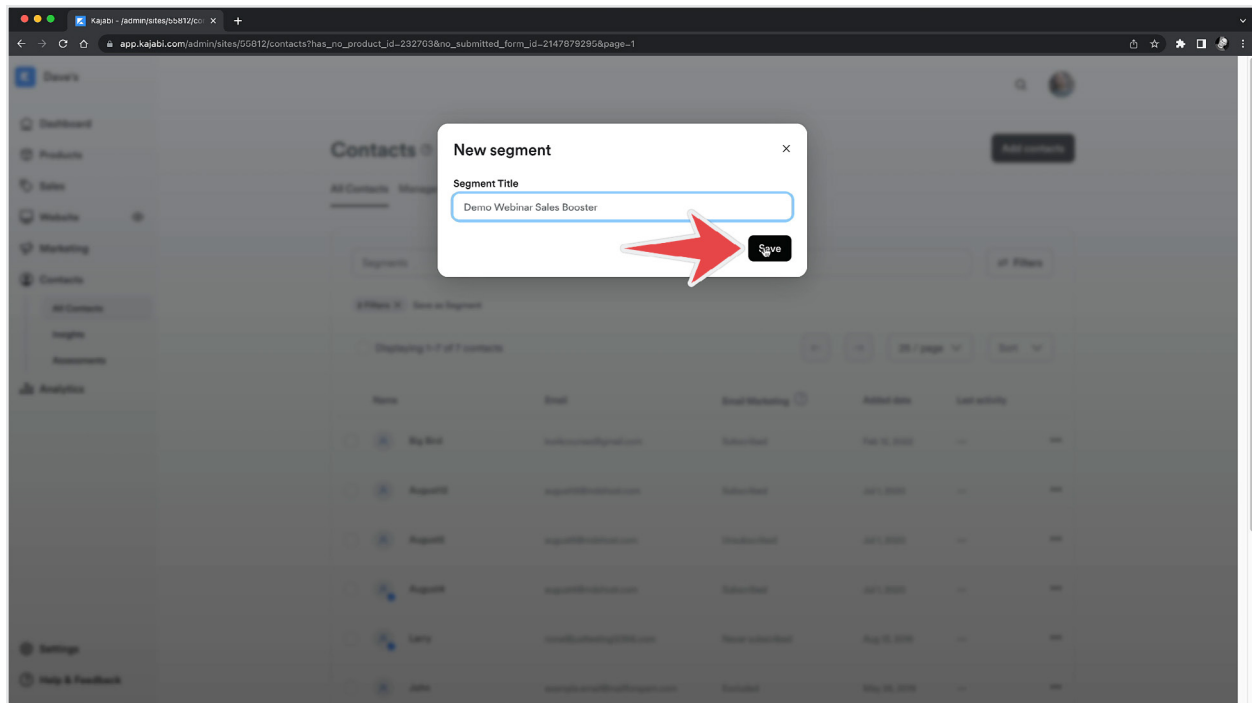


Click **Apply Filters**:



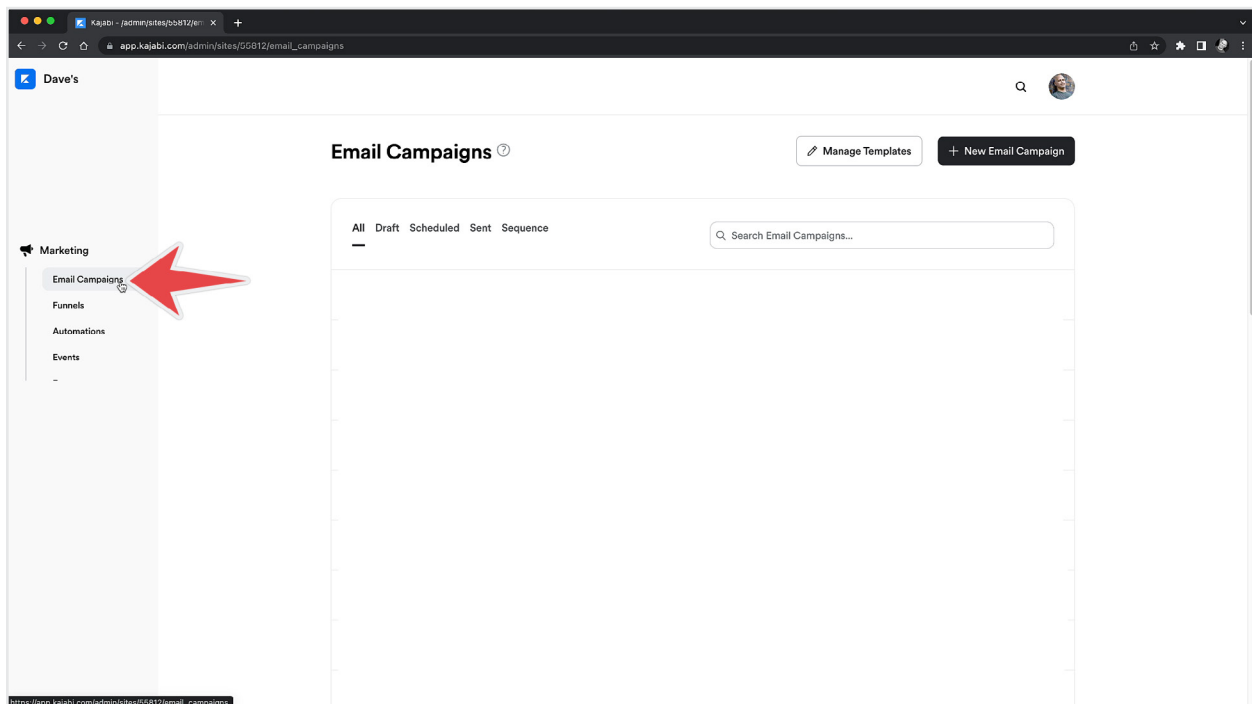
Then click **Save as Segment**, give it a name that makes sense and click **Save**:



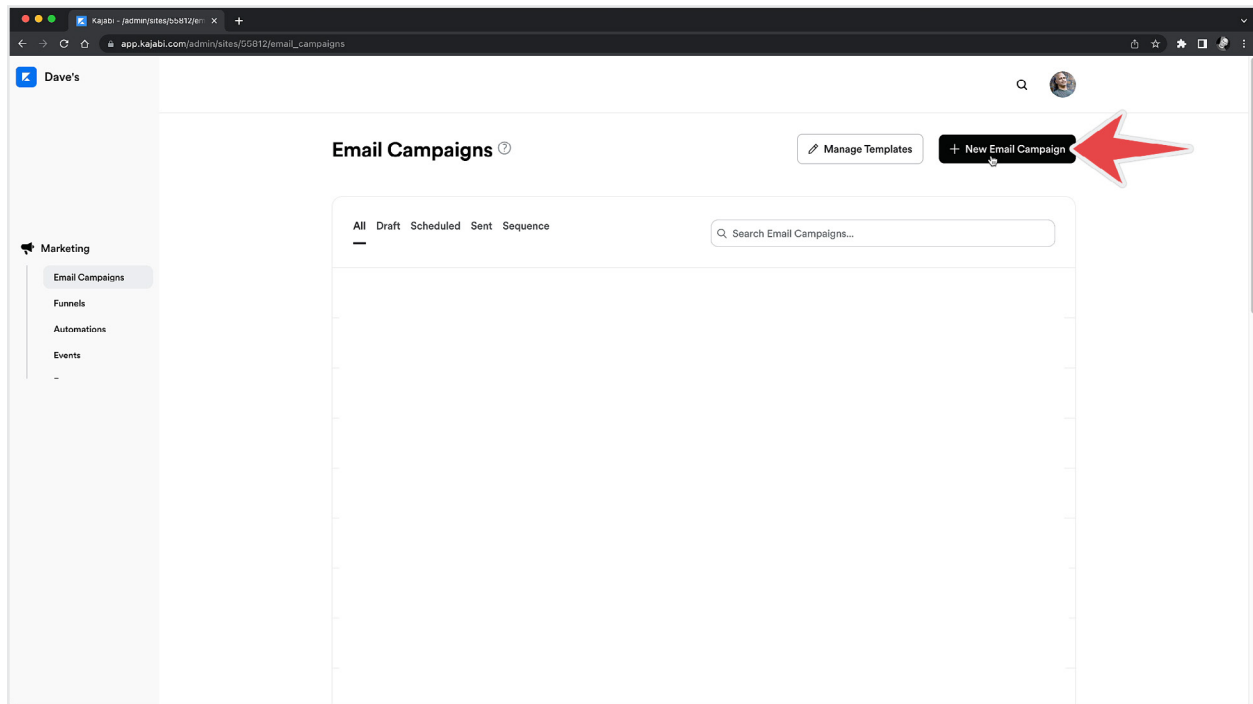


Okay, great, you've got all of your segments set up and in just a little bit, you're going to see how all of this hard work pays off.

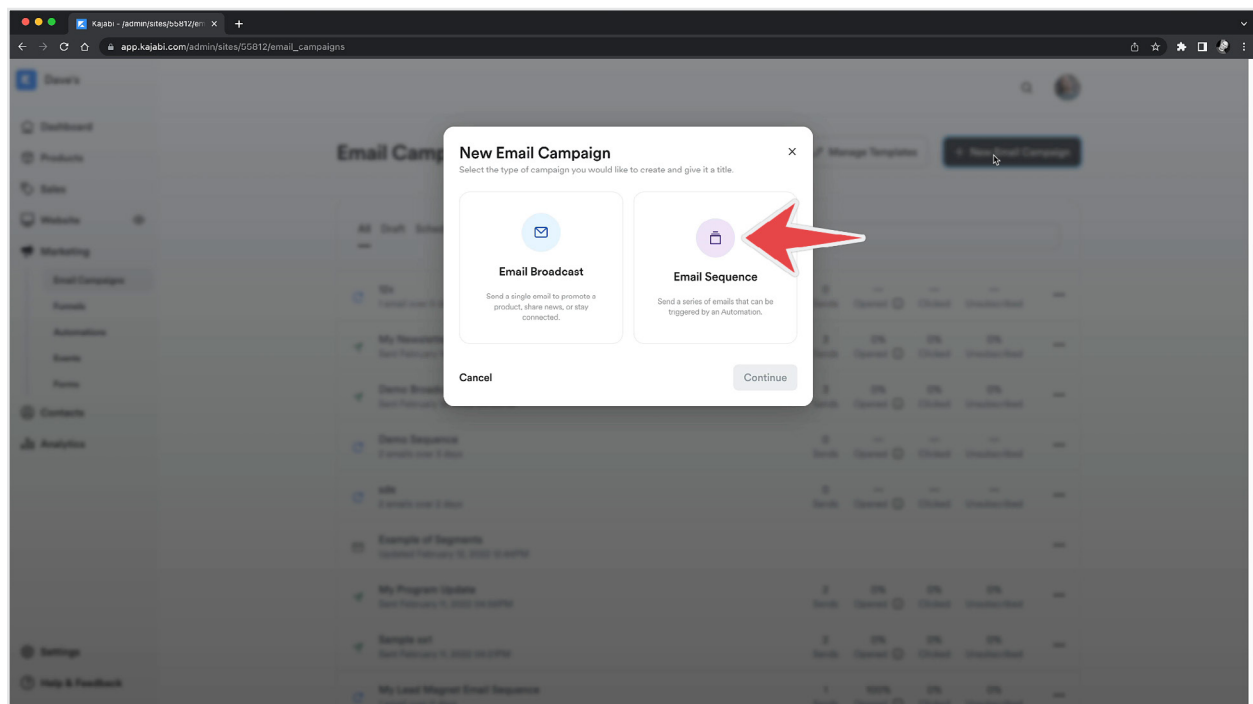
Now it's time to set up your **automated sequence** for your welcome email. Go to the side panel to the left, select Marketing and then **Email Campaigns**:

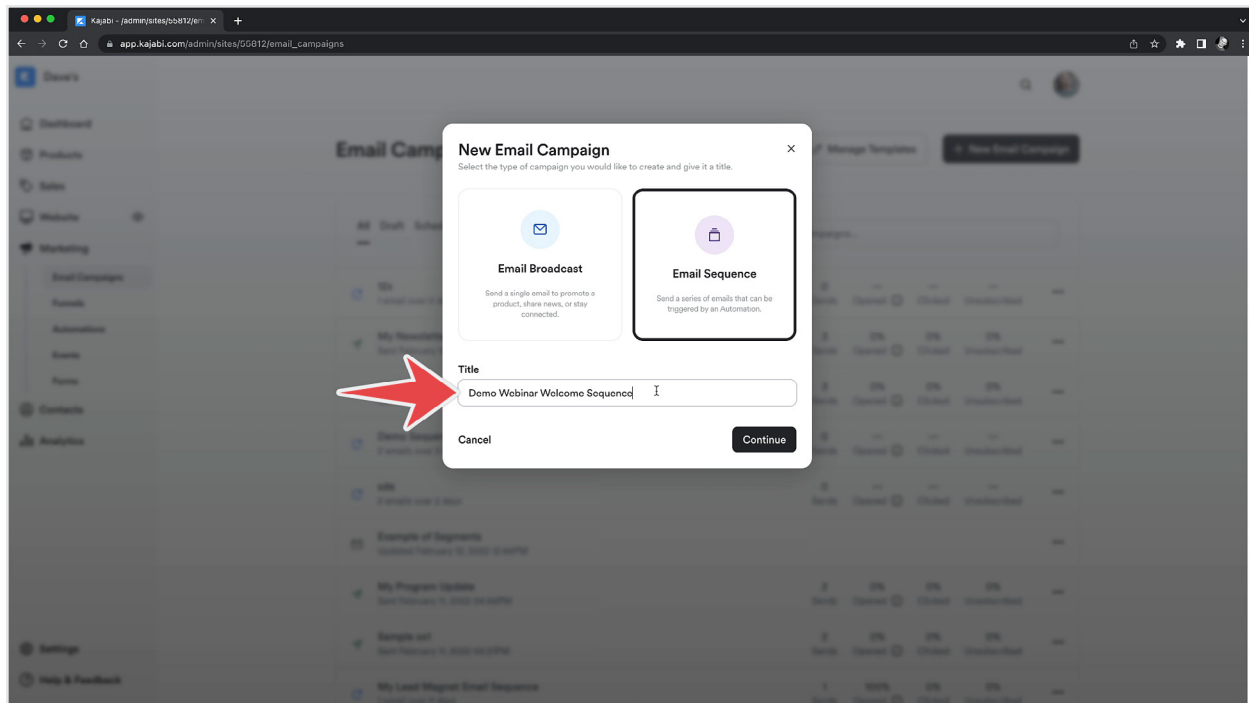


Then click on **New Email Campaign**:

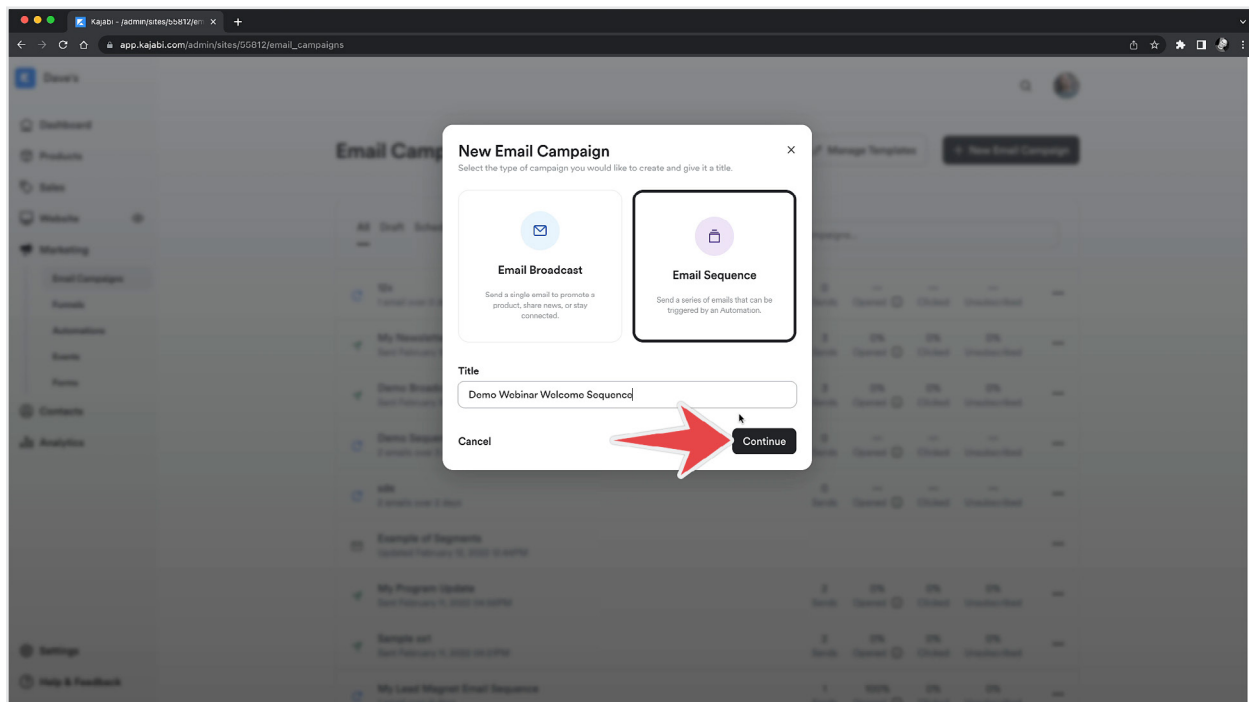


In the dialogue that appears, select **Email Sequence** and then give your sequence a title that makes sense to you. For example, I've named mine Demo Webinar Welcome Sequence:

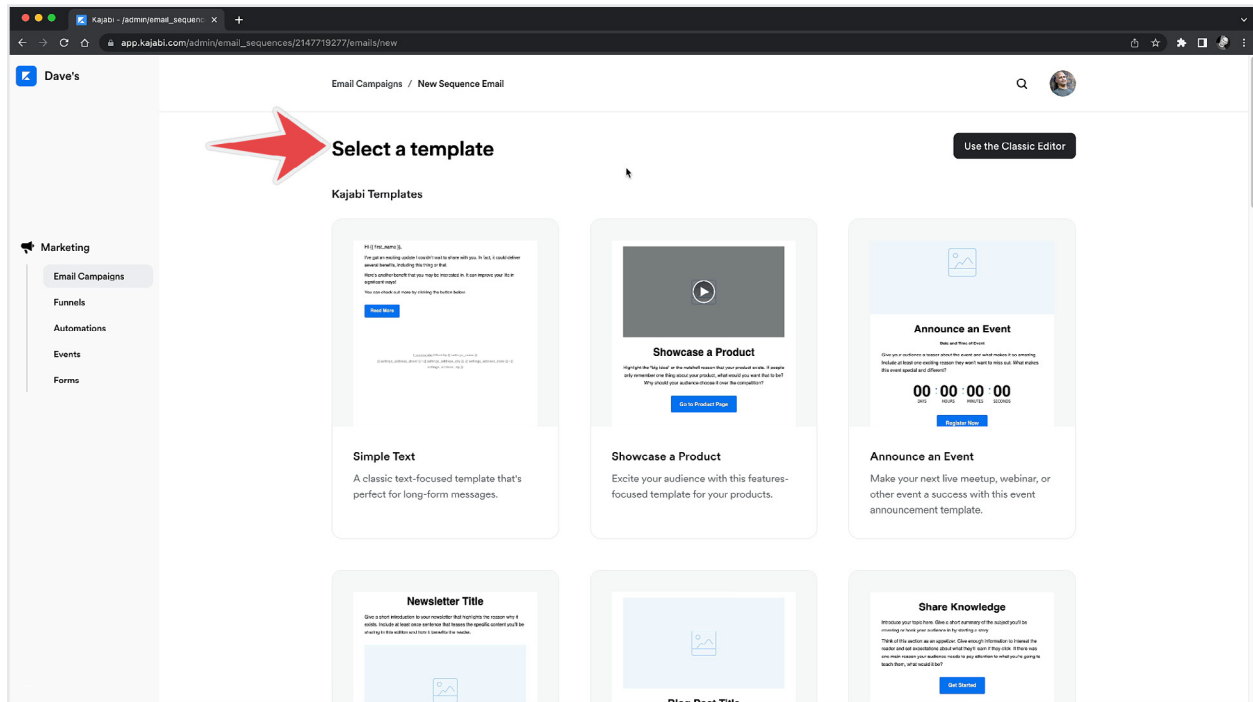




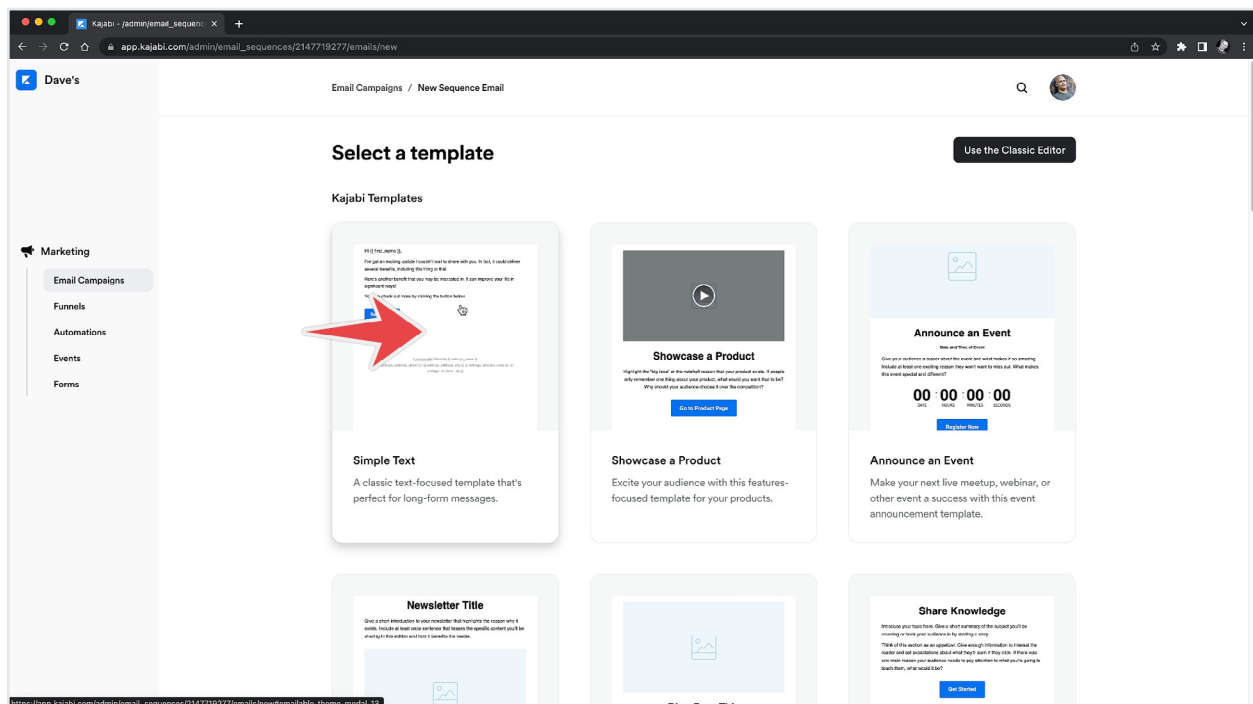
And then click **Continue**:



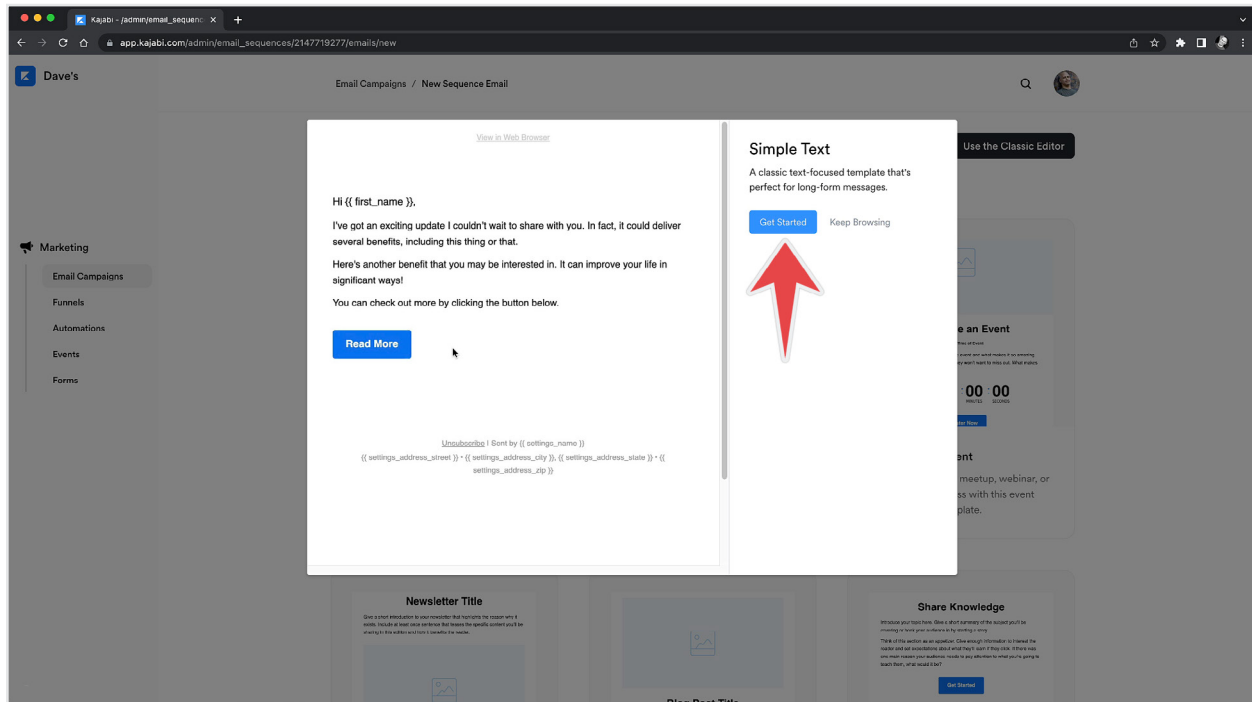
On the next screen, Kajabi will ask you to select a **template** for your email. Optionally, you could also use the **Classic Editor**. In this example, I'm going to use a template and later on I'll show you how to use the Classic Editor:



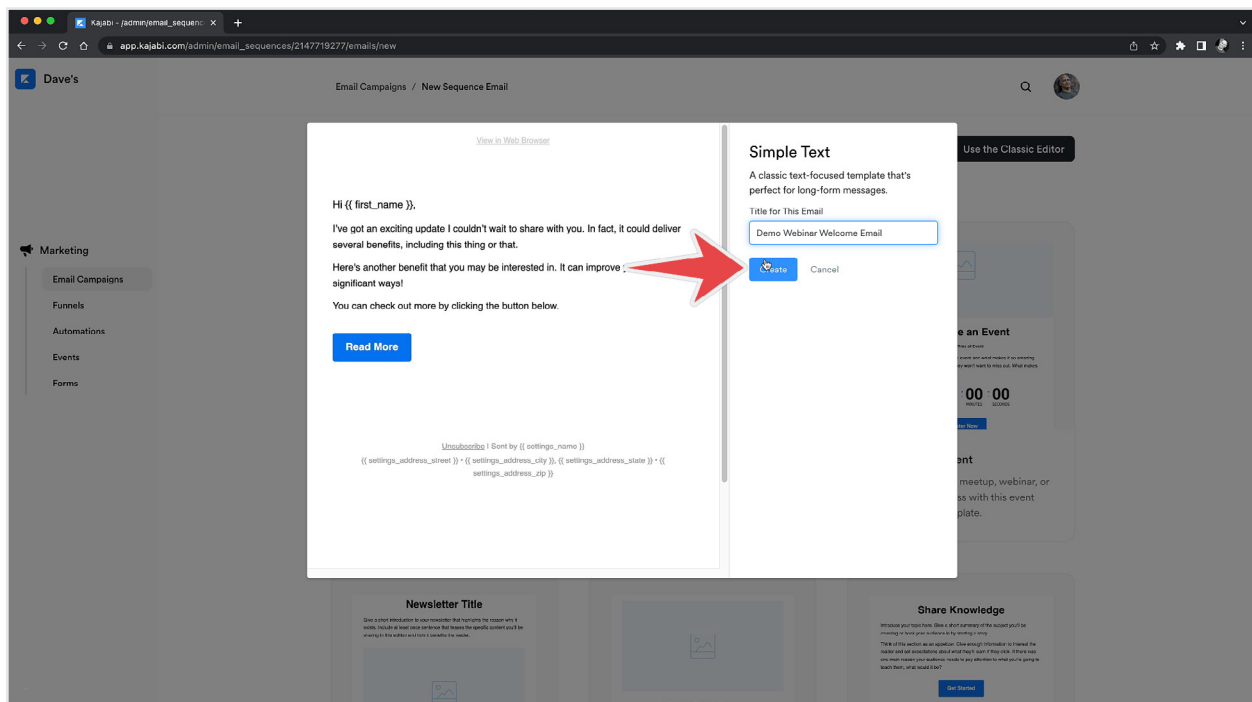
Select a template to use. In this example, I'm selecting a simple text template:



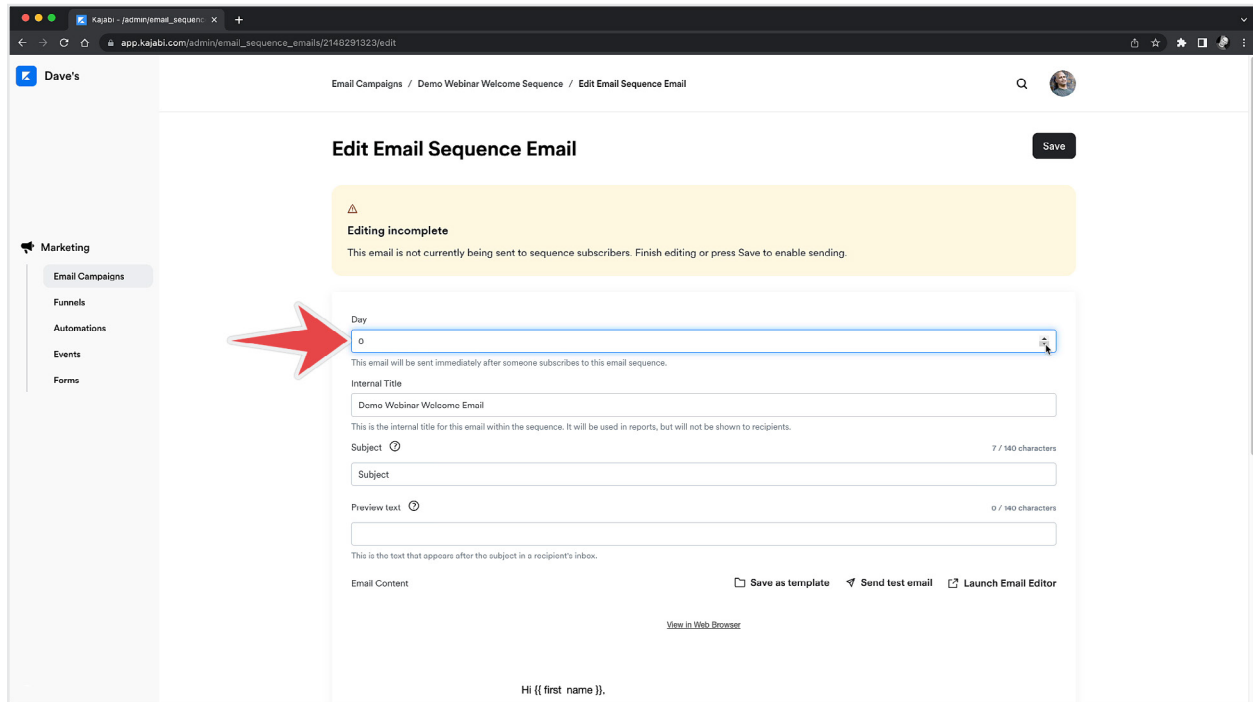
It will give you a preview of what the email might look like, then click **Get Started**:



It will ask for a title. Enter a name that makes sense to you and click **Create**:

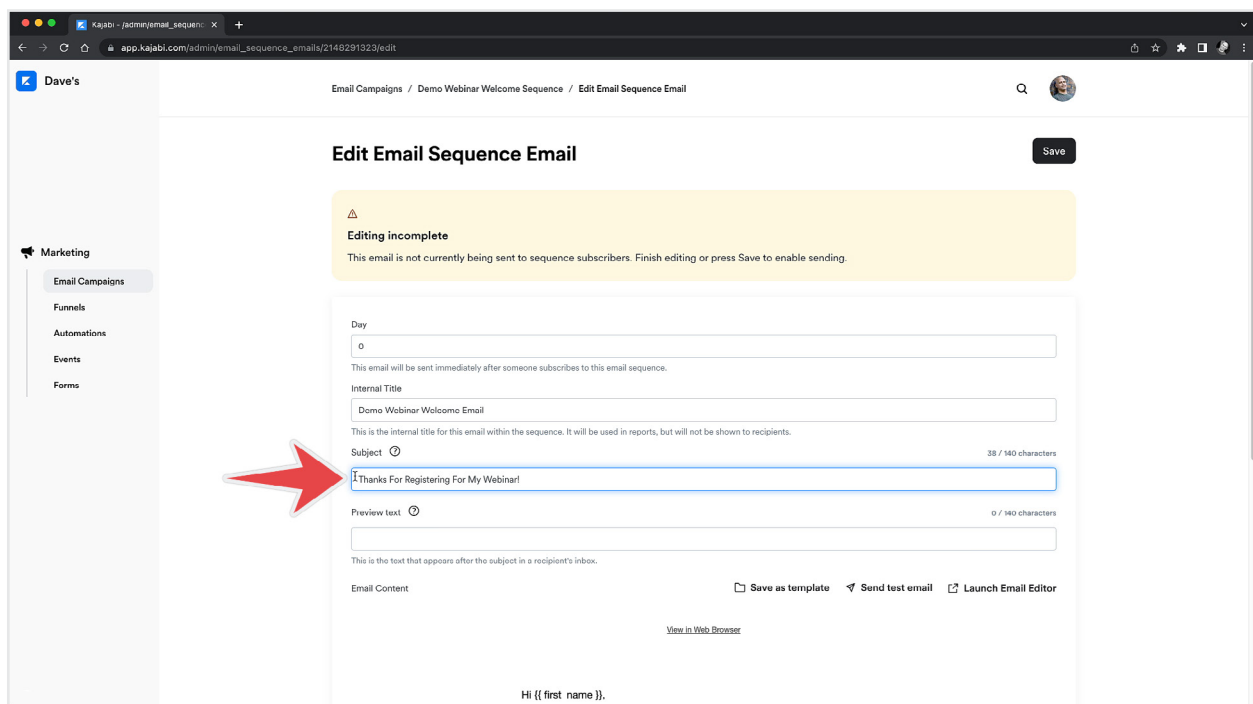


On the next screen for **Day**, change this to **0**. That means the email will be sent immediately after someone registers for any of your webinars:



The screenshot shows the 'Edit Email Sequence Email' interface in Kajabi. A red arrow points to the 'Day' field, which is set to '0'. The form includes a 'Save' button in the top right corner. A yellow warning box at the top states 'Editing incomplete' and 'This email is not currently being sent to sequence subscribers. Finish editing or press Save to enable sending.' The form fields include: 'Day' (0), 'Internal Title' (Demo Webinar Welcome Email), 'Subject' (empty), 'Preview text' (empty), and 'Email Content' (Hi {{ first name }}). The 'Subject' field has a character count of 7 / 140 characters. The 'Preview text' field has a character count of 0 / 140 characters. The 'Email Content' field has a character count of 0 / 140 characters. The 'Email Content' field contains the text 'Hi {{ first name }}'.

Next, enter your **Email Subject**:



The screenshot shows the 'Edit Email Sequence Email' interface in Kajabi. A red arrow points to the 'Subject' field, which is set to 'Thanks For Registering For My Webinar!'. The form includes a 'Save' button in the top right corner. A yellow warning box at the top states 'Editing incomplete' and 'This email is not currently being sent to sequence subscribers. Finish editing or press Save to enable sending.' The form fields include: 'Day' (0), 'Internal Title' (Demo Webinar Welcome Email), 'Subject' (Thanks For Registering For My Webinar!), 'Preview text' (empty), and 'Email Content' (Hi {{ first name }}). The 'Subject' field has a character count of 38 / 140 characters. The 'Preview text' field has a character count of 0 / 140 characters. The 'Email Content' field has a character count of 0 / 140 characters. The 'Email Content' field contains the text 'Hi {{ first name }}'.

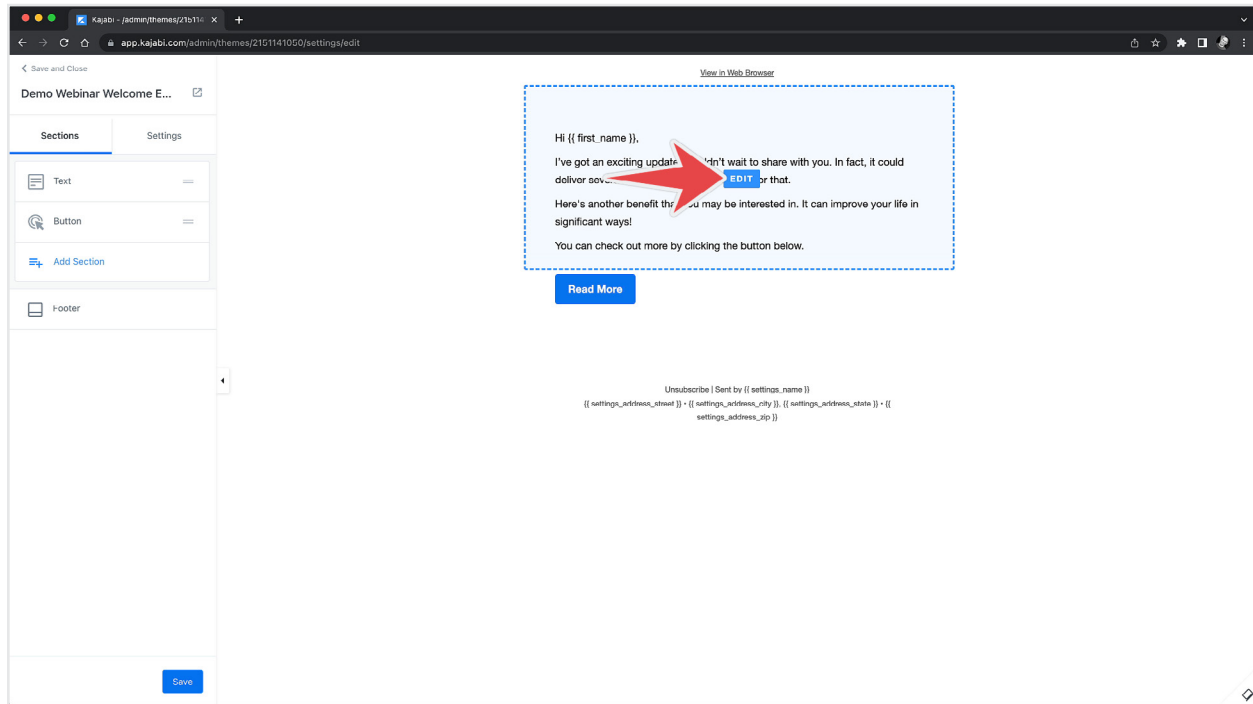
Optionally, you could enter **Preview Text**. This would appear in a person's email software before they open up an email:

The screenshot shows the 'Edit Email Sequence Email' page in the Kajabi dashboard. A yellow warning box at the top states 'Editing Incomplete' and 'This email is not currently being sent to sequence subscribers. Finish editing or press Save to enable sending.' The form includes fields for 'Day' (set to 0), 'Internal Title' ('Demo Webinar Welcome Email'), 'Subject' ('Thanks For Registering For My Webinar!'), and 'Preview text'. A red arrow points to the 'Preview text' field, which is currently empty. Below the form are buttons for 'Save as template', 'Send test email', and 'Launch Email Editor', along with a 'View in Web Browser' link. The email content preview at the bottom shows 'Hi {{ first_name }},'.

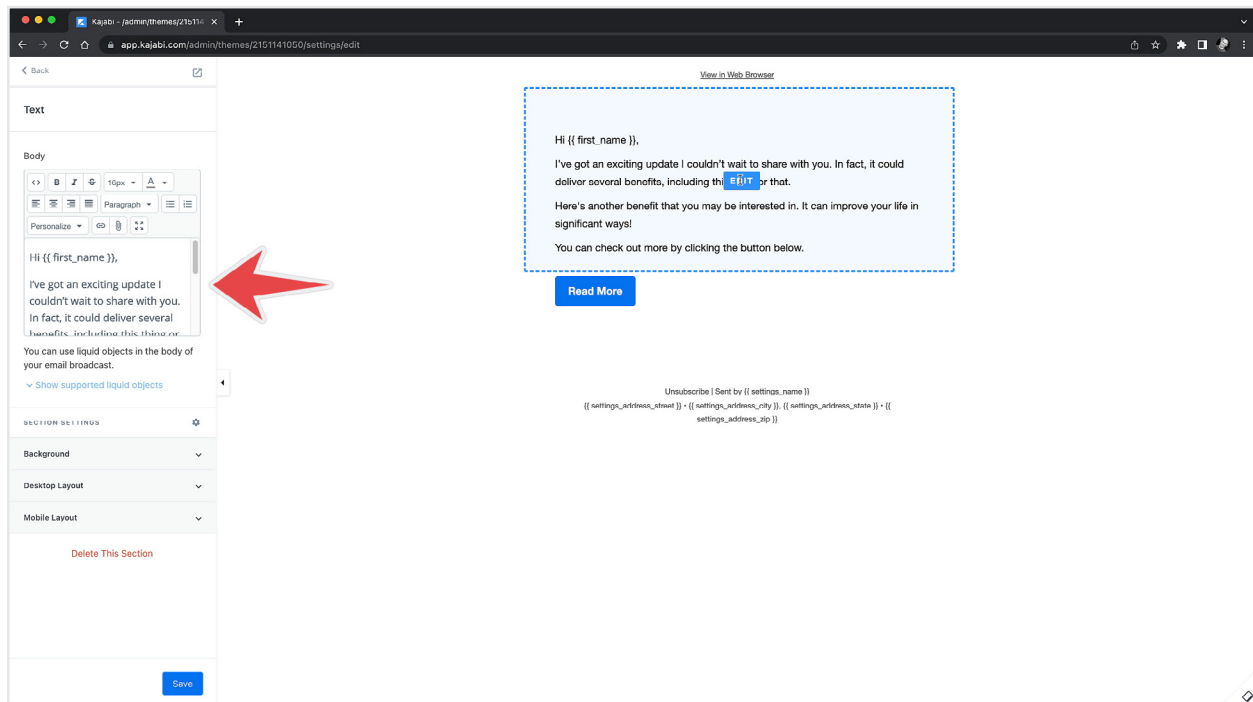
Now it's time to edit the email body copy. Hover your mouse over the text and click **Edit content**:

This screenshot shows the same 'Edit Email Sequence Email' page, but with the 'Email Content' section expanded. It displays a preview of the email body. A red arrow points to an 'Edit content' button located in the top right corner of the preview area. The preview text includes a greeting 'Hi {{ first_name }}', a paragraph about an exciting update, another paragraph about a benefit, and a 'Read More' button. The footer of the preview shows unsubscribe and contact information links.

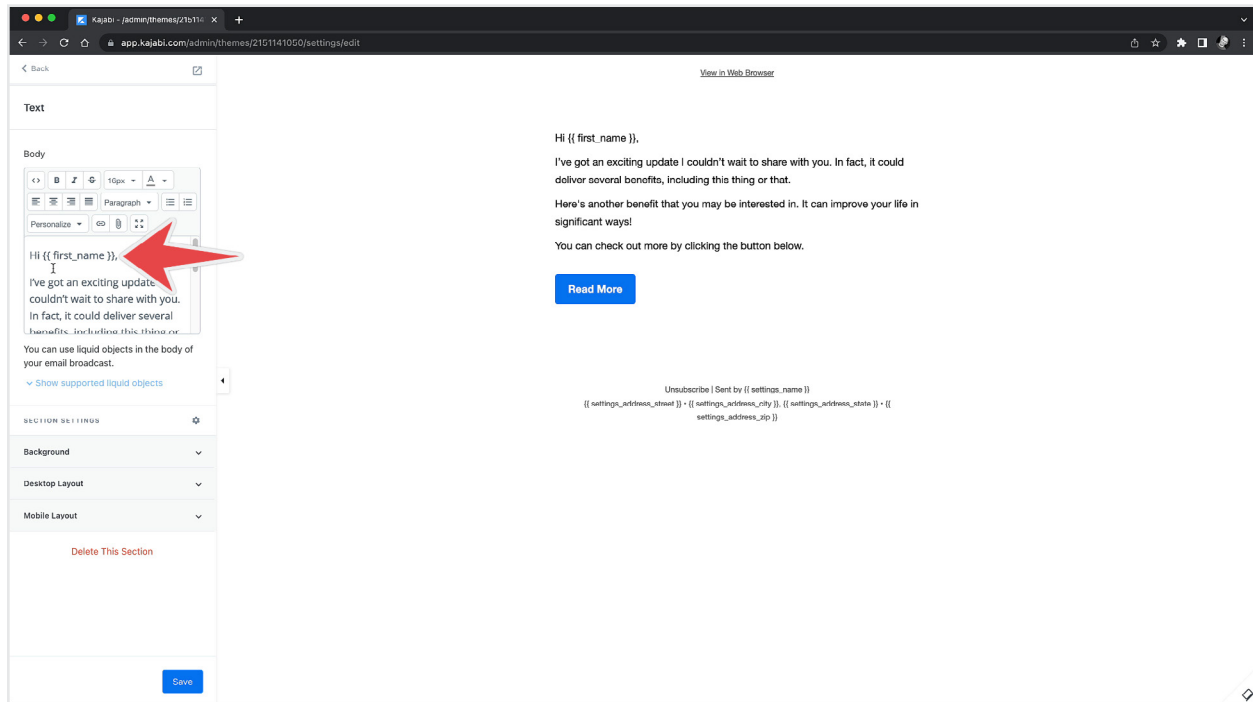
This will open the Kajabi email builder and it works very similar to their page builder. To edit the content for your email, hover over the text and click **Edit**:



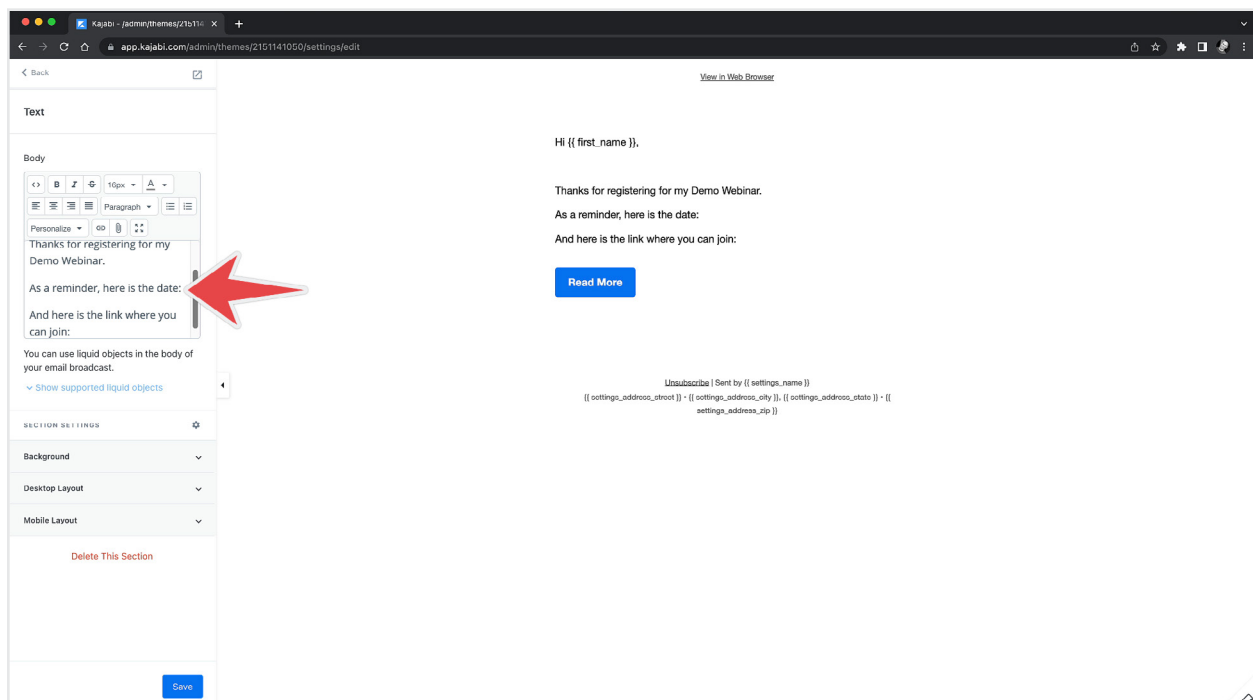
Then go to the panel to the left. This is where you can change the actual content:



But notice this funny looking text after the word “Hi”. This is called a token or a placeholder. Kajabi will replace this token or placeholder with the actual recipient’s first name when it sends the email:

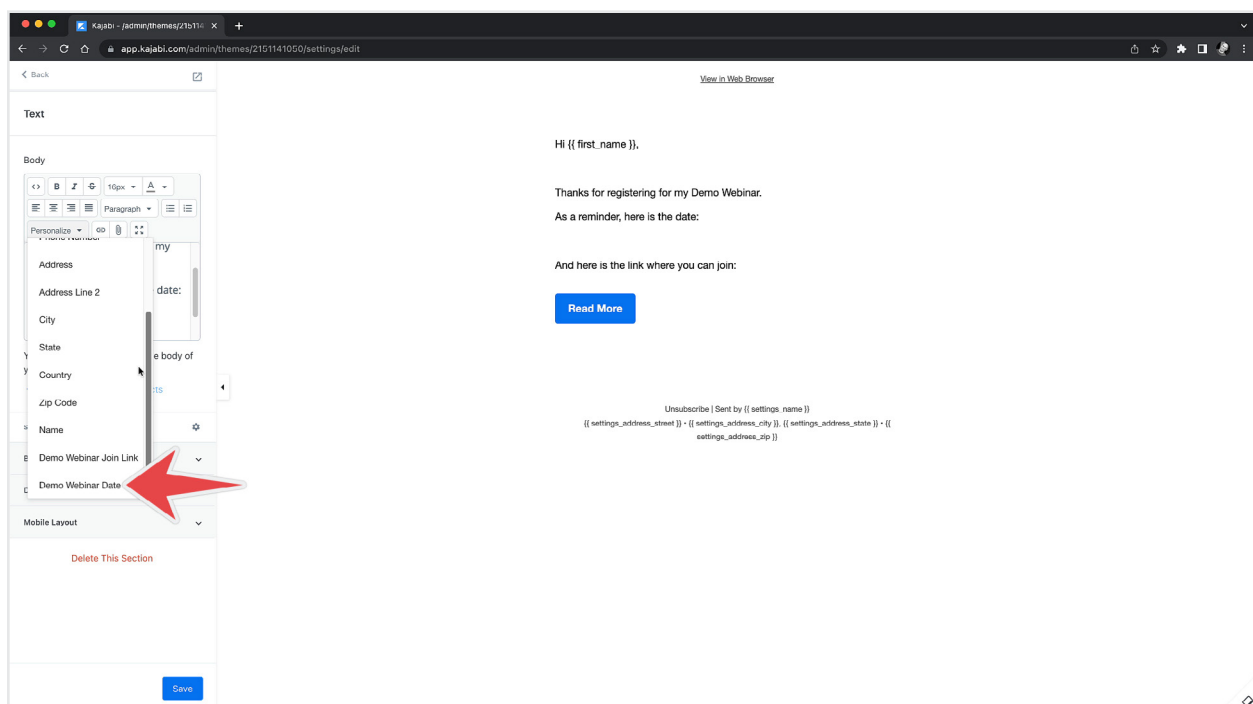
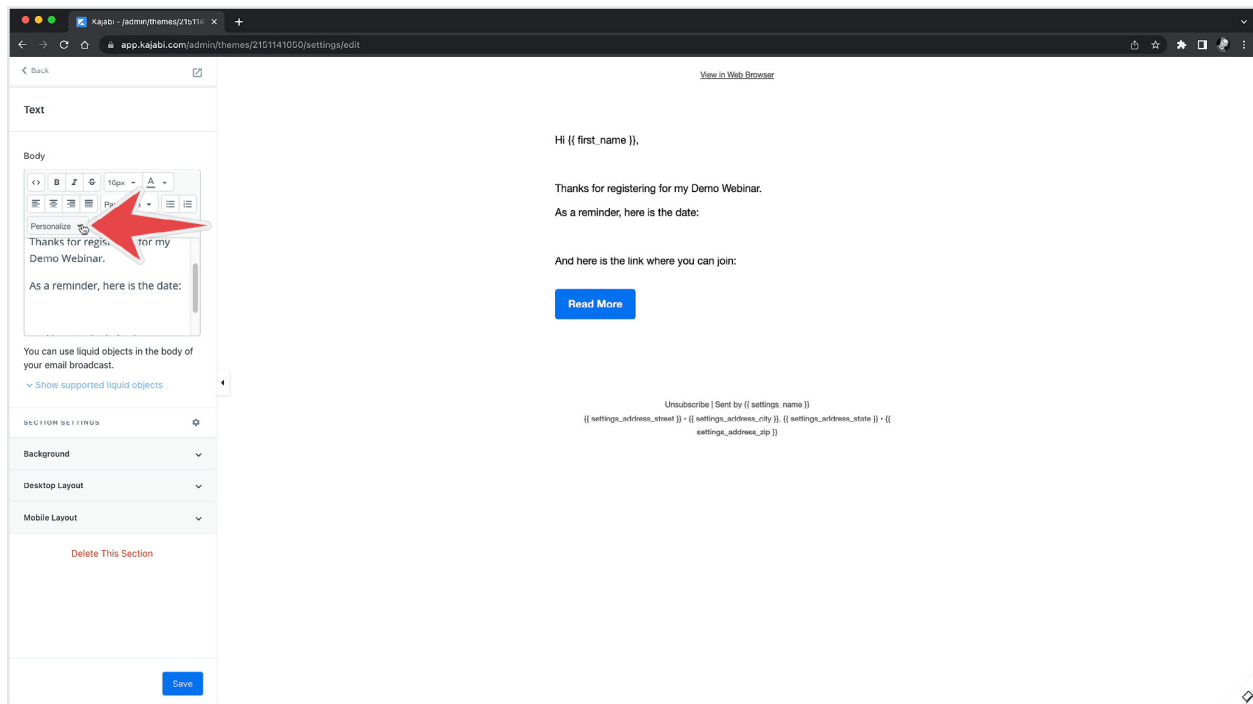


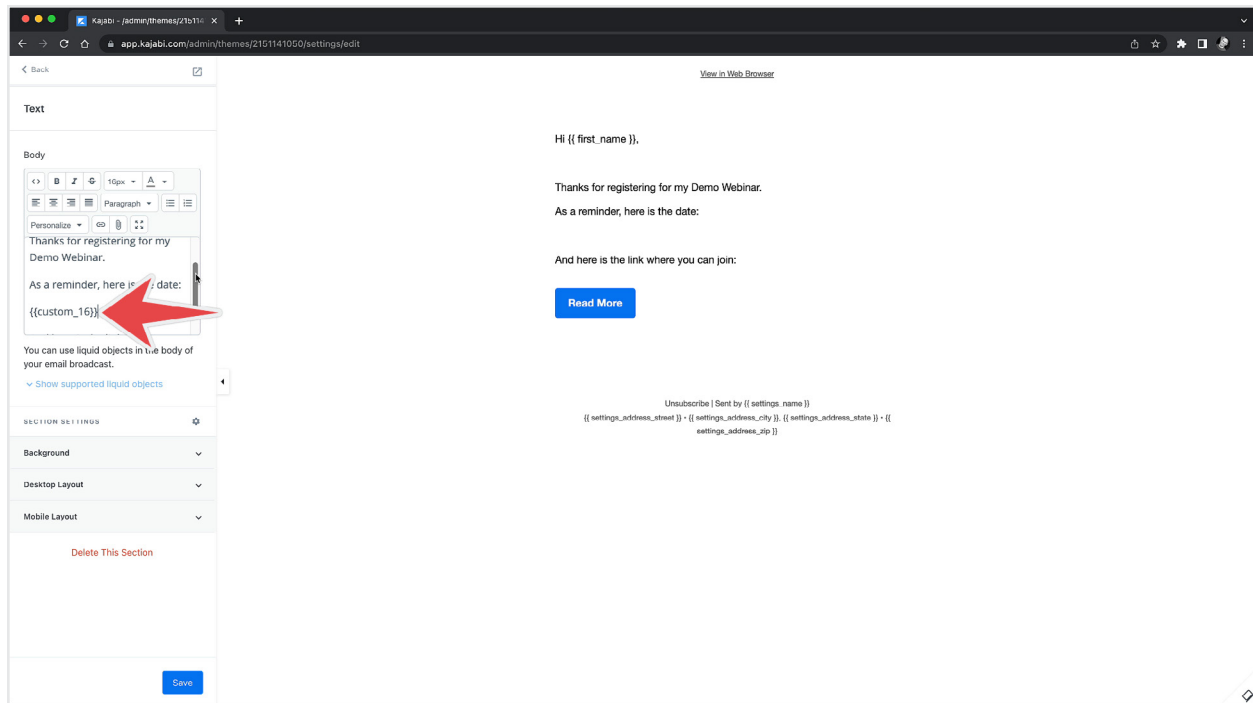
Edit your content however you’d like. In this example, notice that I’ve created some text for the **webinar date** and **join link**:



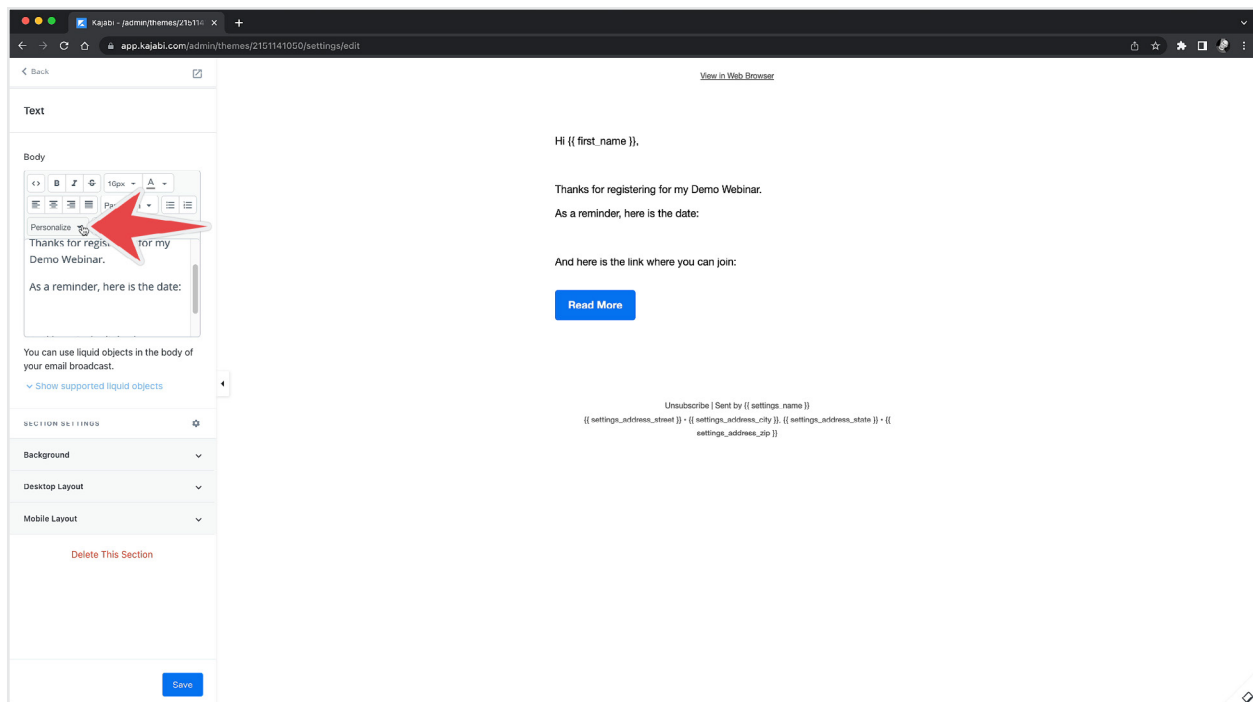
Just like with the first name, you can use tokens or placeholders to have Kajabi dynamically add the webinar date and join link into your email. In this example, I'm going to add the **webinar date** first.

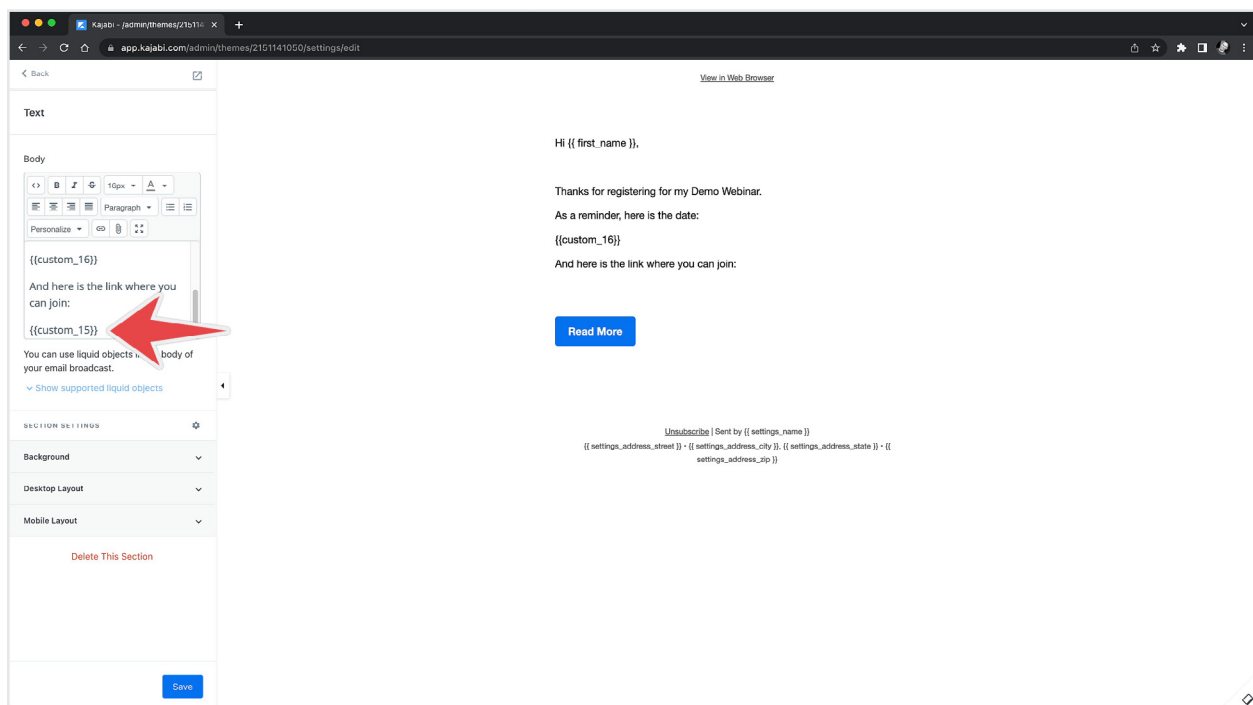
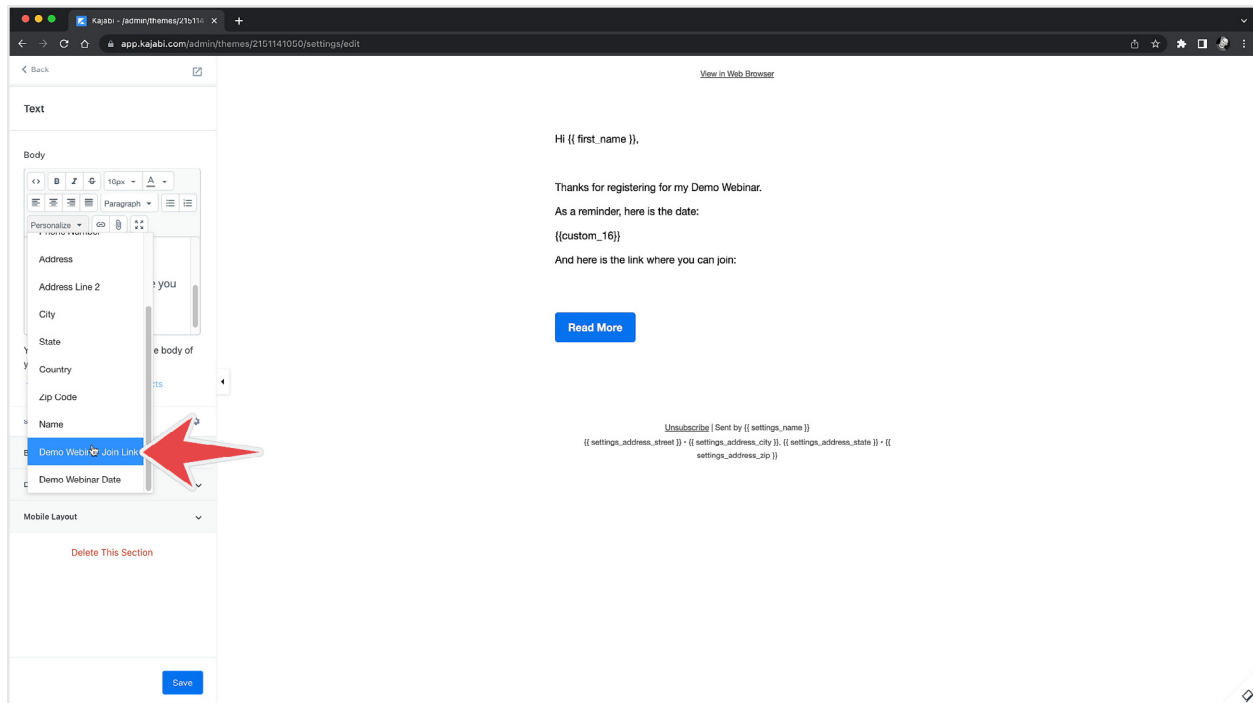
To do that, click on **Personalize** and then select your **webinar date field** from the list:



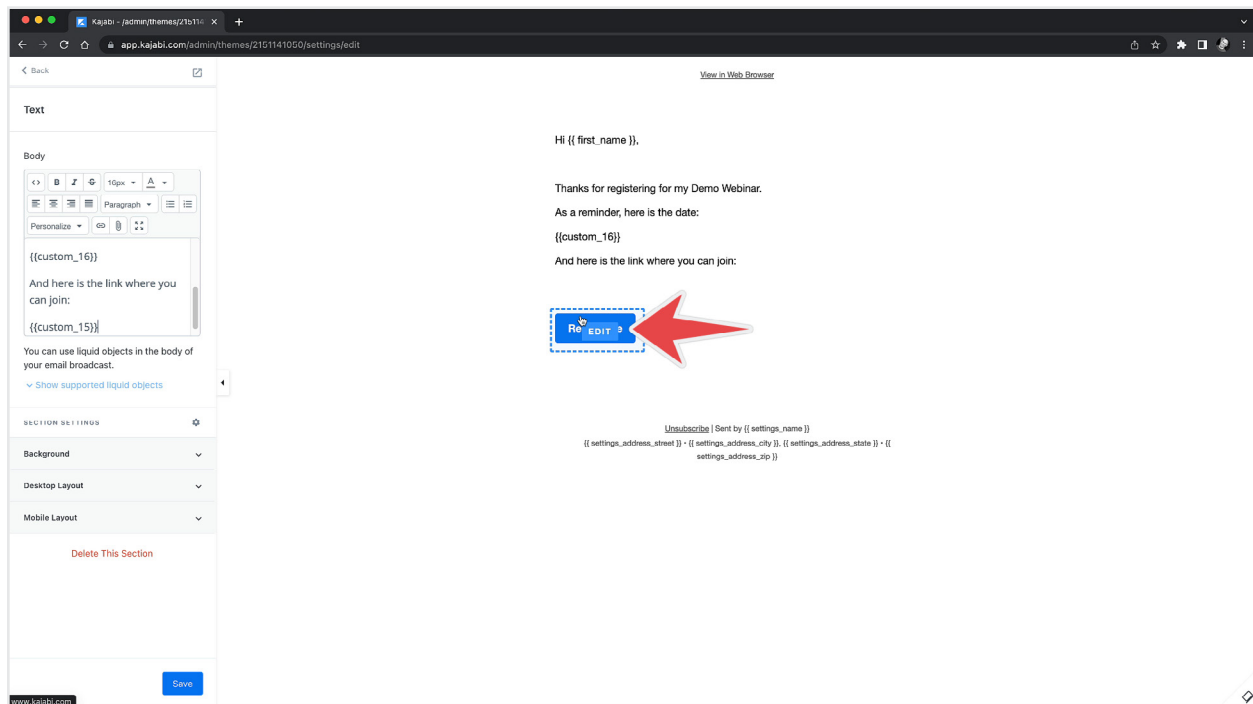


Repeat the same process to add the **webinar join link** to your email. Click **Personalize**, then select your **webinar join link field**:

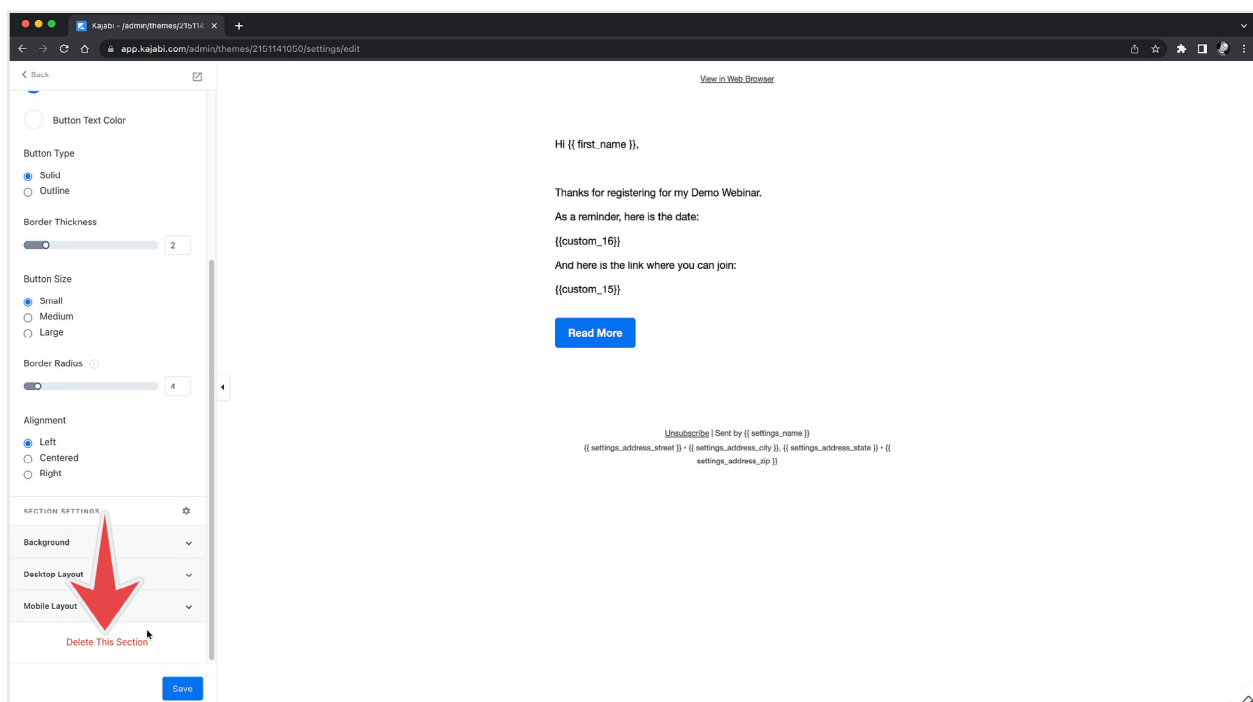




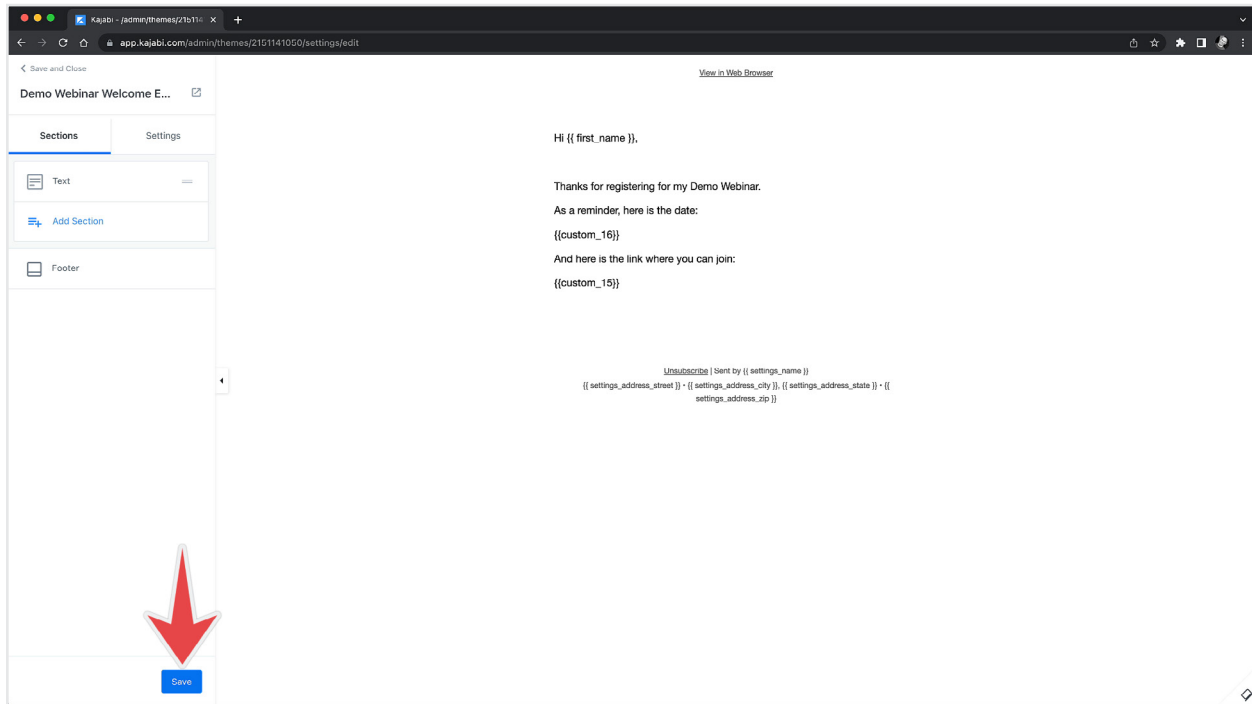
Okay, now there's one more thing to do in the design of this email. This template contains a button. And let's say you don't want to use it, you want to remove it. To do that, click **Edit** on the button:



Then go to the side panel to the left, scroll all the way down and choose **Delete This Section**:



And the button will be removed. When you're done editing the email, click on the **Save** button:



Then go to the upper left and click on **Save and Close**:



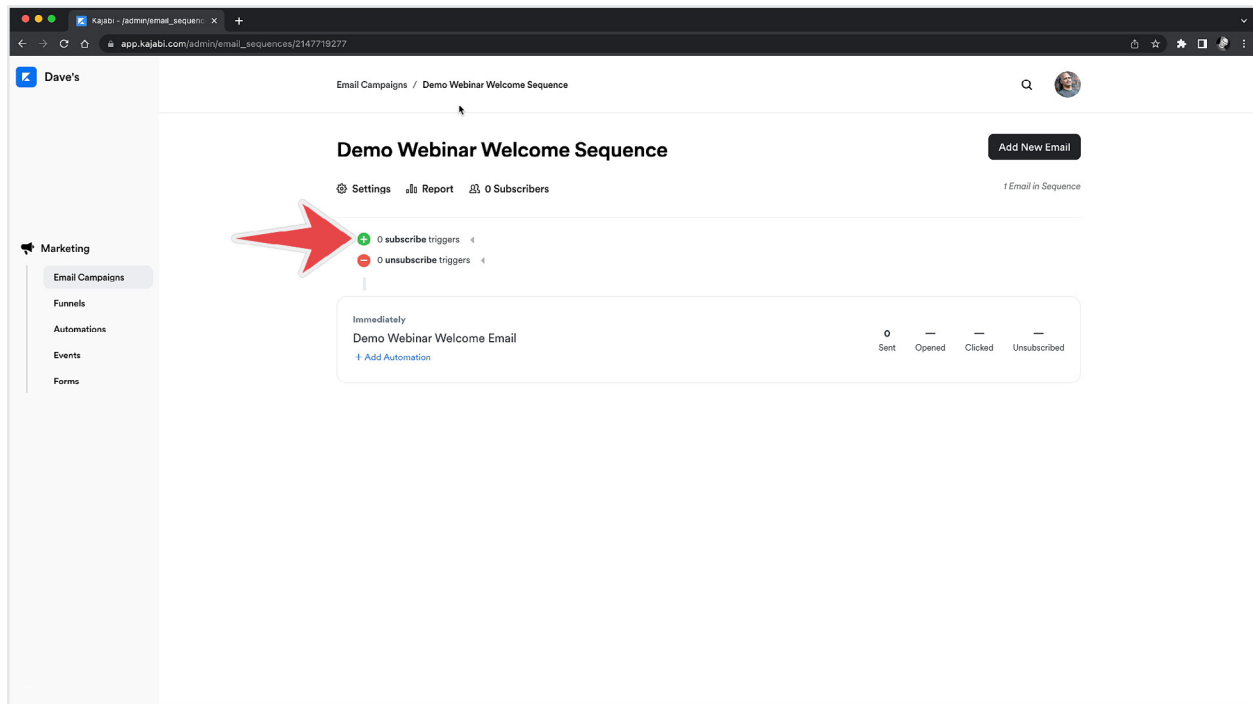
Then click on **Save** again:

The screenshot shows the 'Edit Email Sequence Email' page in the Kajabi admin interface. The breadcrumb trail at the top reads 'Email Campaigns / Demo Webinar Welcome Sequence / Edit Email Sequence Email'. On the left is a sidebar with 'Marketing' expanded, showing 'Email Campaigns', 'Funnels', 'Automations', 'Events', and 'Forms'. The main form contains the following fields: 'Day' (set to 0), 'Internal Title' (set to 'Demo Webinar Welcome Email'), 'Subject' (set to 'Thanks For Registering For My Webinar!'), and 'Preview text' (empty). Below these fields are three buttons: 'Save as template', 'Send test email', and 'Launch Email Editor'. At the bottom, there is a 'View in Web Browser' link and a preview of the email content, which includes a personalized greeting, a thank you message, a reminder date, and a link placeholder. A large red arrow points from the top right towards the 'Save' button.

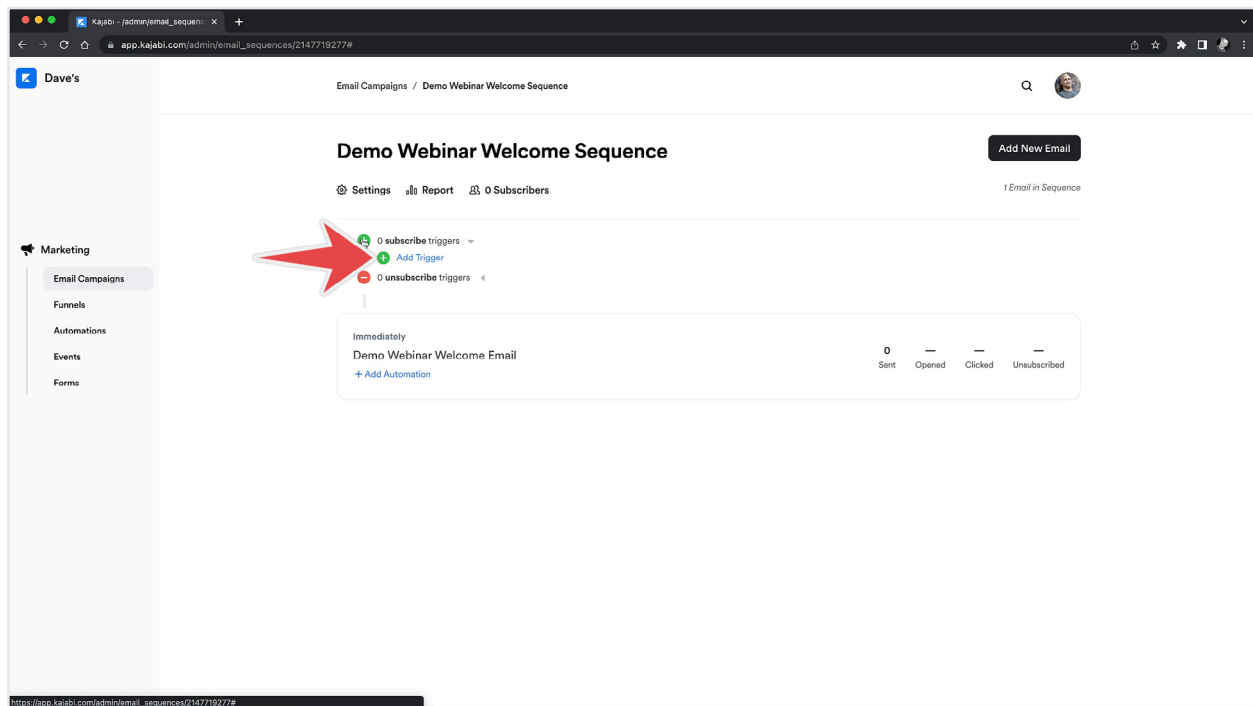
The welcome email for your automated sequence is now set up, but there is one final thing to do. And what you need to do is set a **Trigger** that tells Kajabi when this email should be sent. To do that, click on the name of your sequence in the breadcrumbs:

This screenshot is identical to the one above, showing the 'Edit Email Sequence Email' page. However, a red arrow points to the 'Demo Webinar Welcome Sequence' link in the breadcrumb trail at the top of the page, indicating the next step in the setup process.

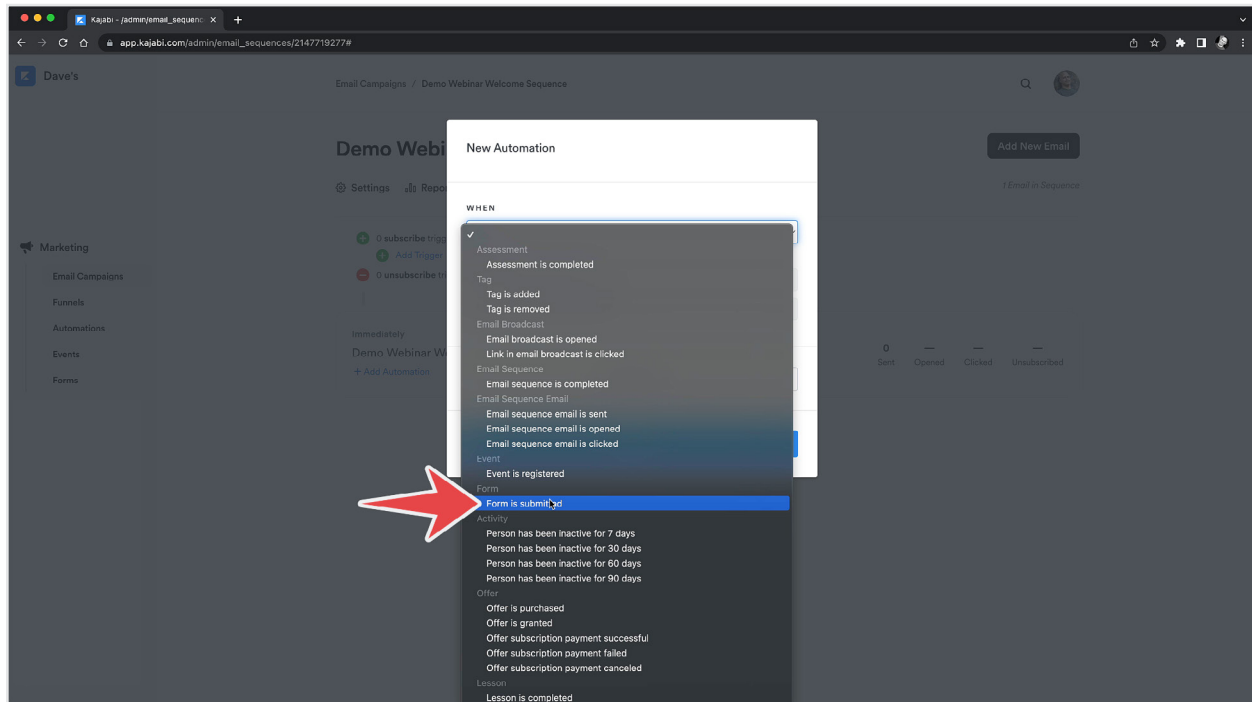
Next, you'll see a little **green plus button**. Click on it:



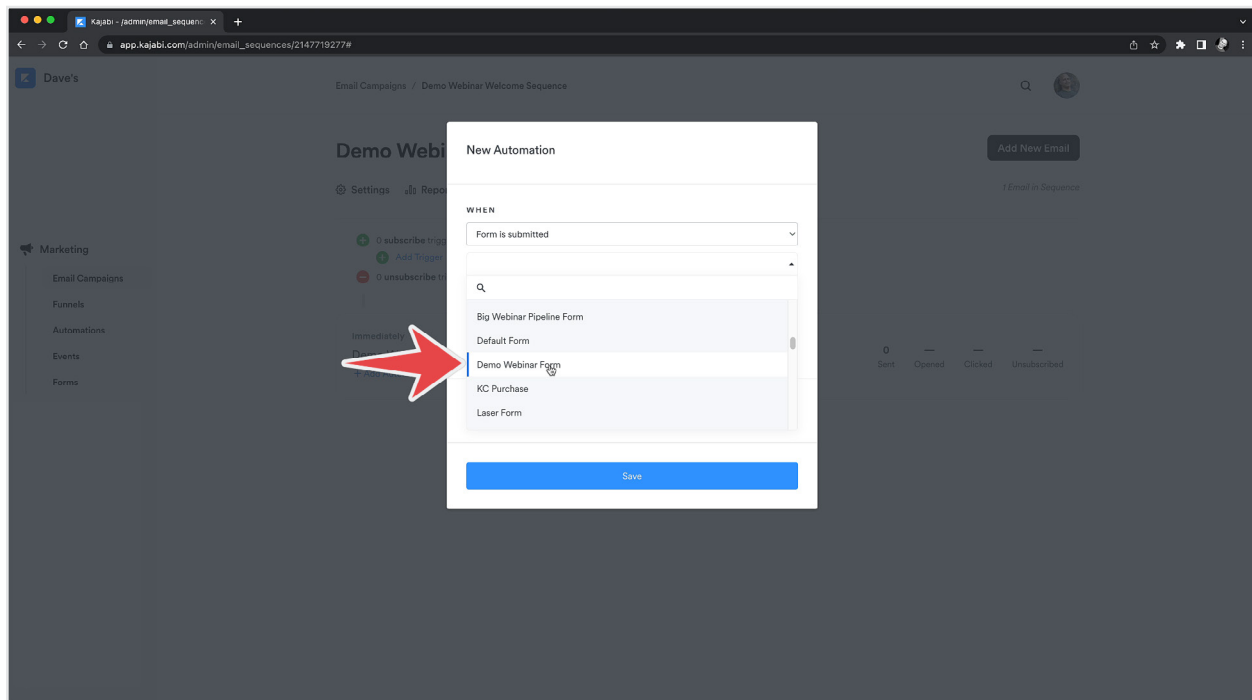
Then click on **Add Trigger**:



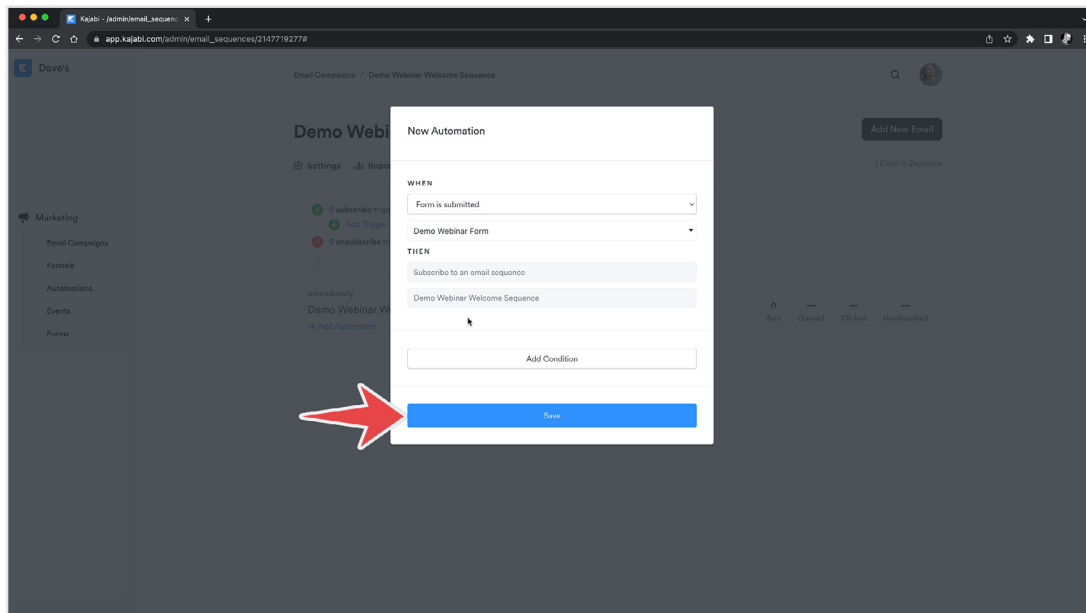
In the dialog that appears, click on the **When** dropdown and select **Form Is Submitted**:



Then in the next dropdown, select your form in Kajabi. It will be the form that Kajabi automatically created when you created your webinar funnel:

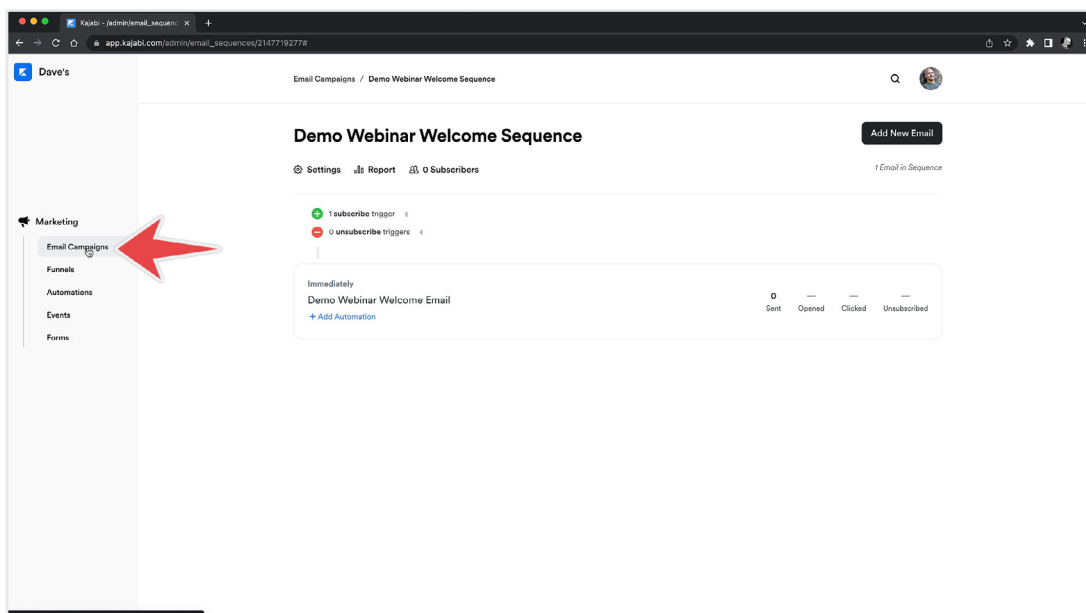


Then click on **Save**:

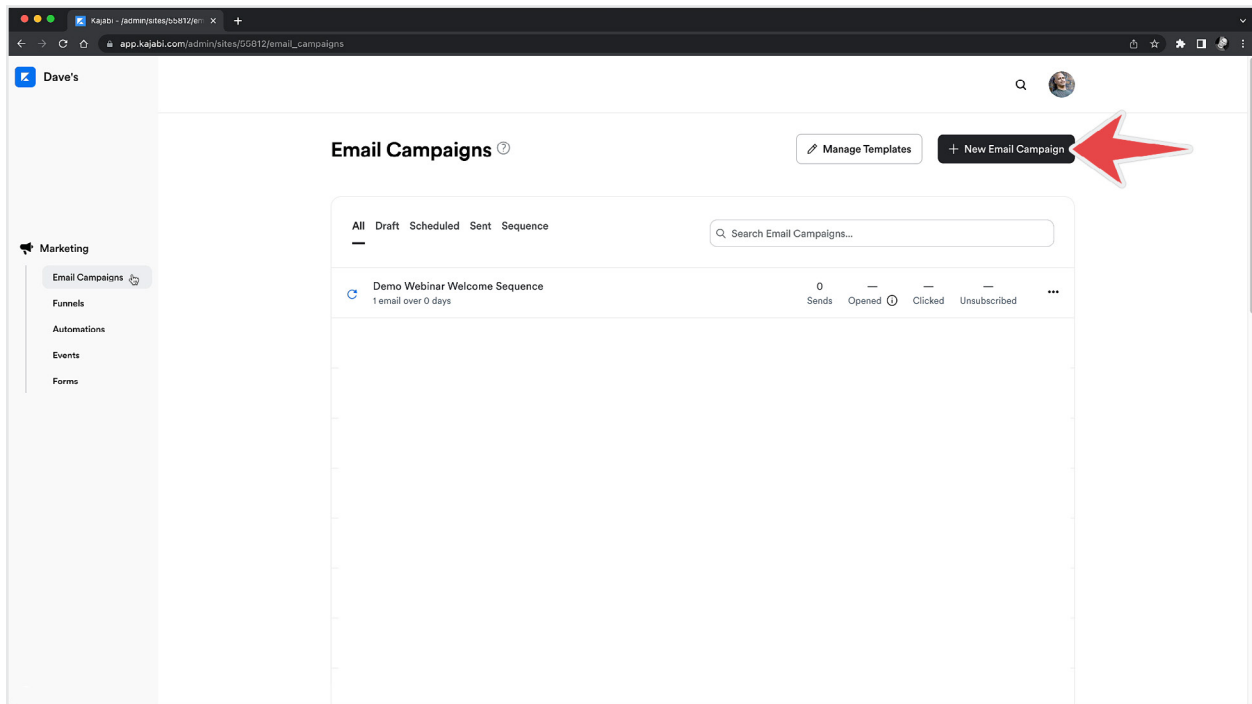


Your automated sequence for your welcome email is now done and ready to go. And what's happening here is that whenever someone registers for any of your webinars, Zapier is going to pass that information from Demio to Kajabi through this form. And once that happens, Kajabi is immediately going to send out your welcome email.

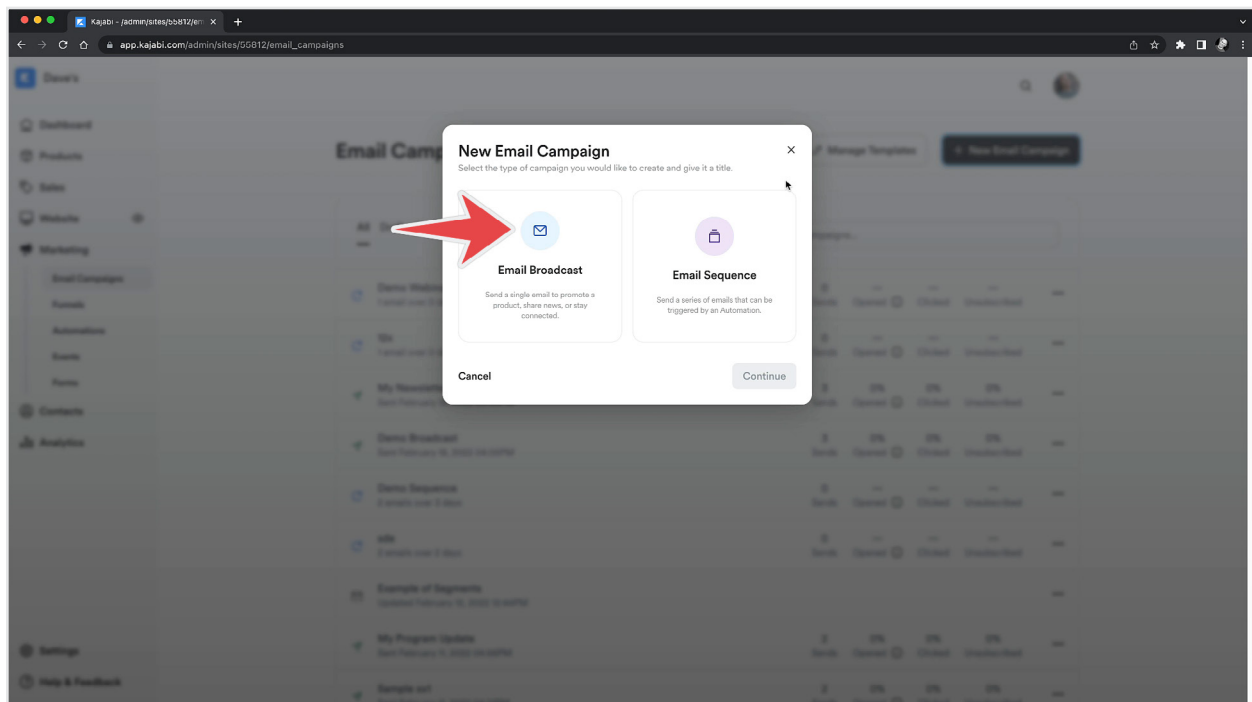
Now, for all of your other webinar marketing emails, you are going to use email **Broadcasts**. Here is how you will create those. In the side panel to the left, choose **Marketing** and **Email Campaigns**:

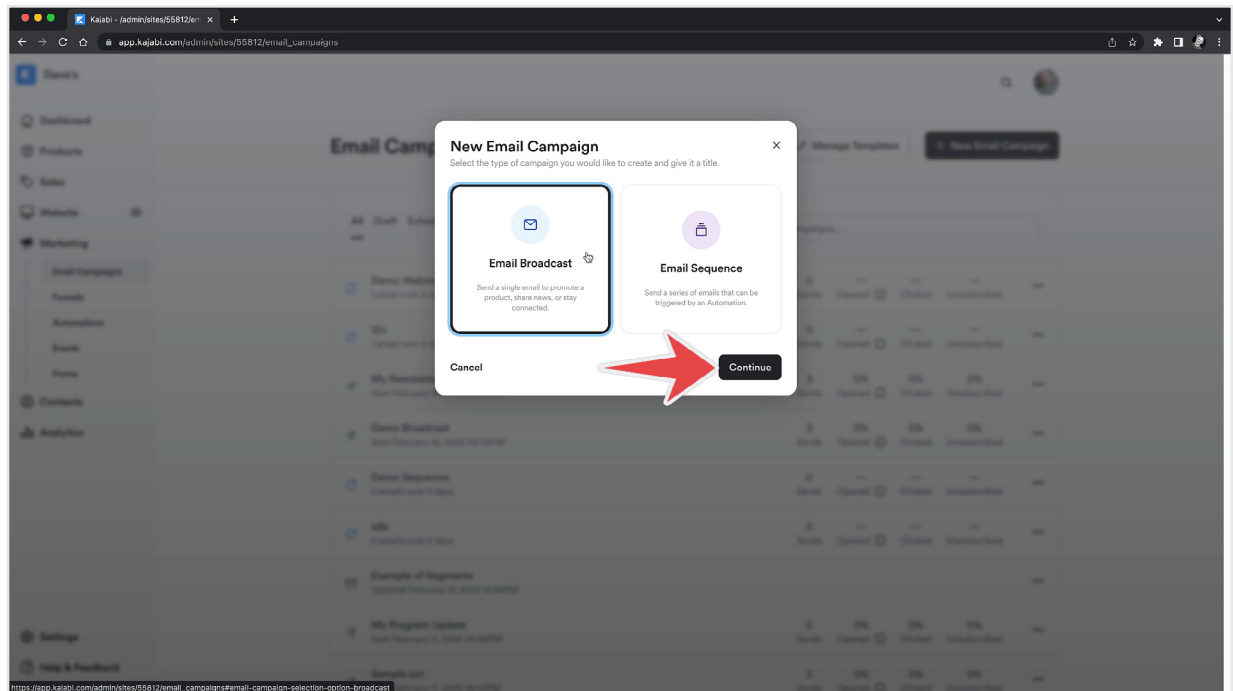


Then click **New Email Campaign**:



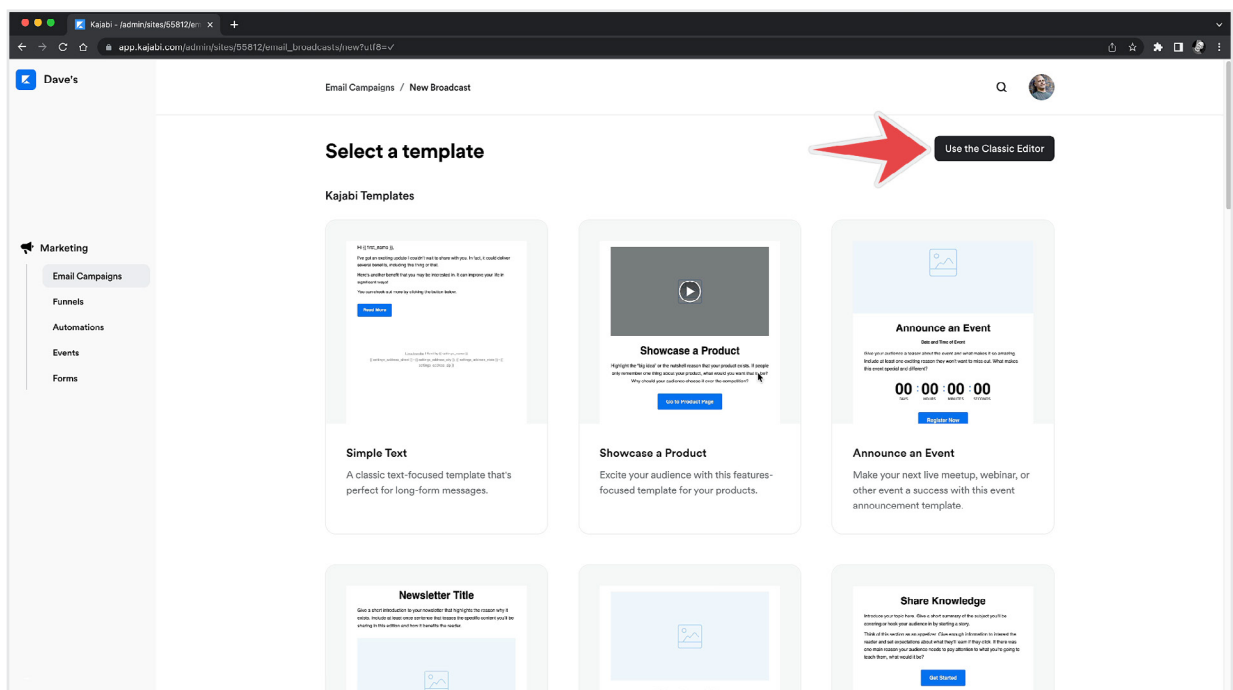
Then choose **Email Broadcast** and click **Continue**:



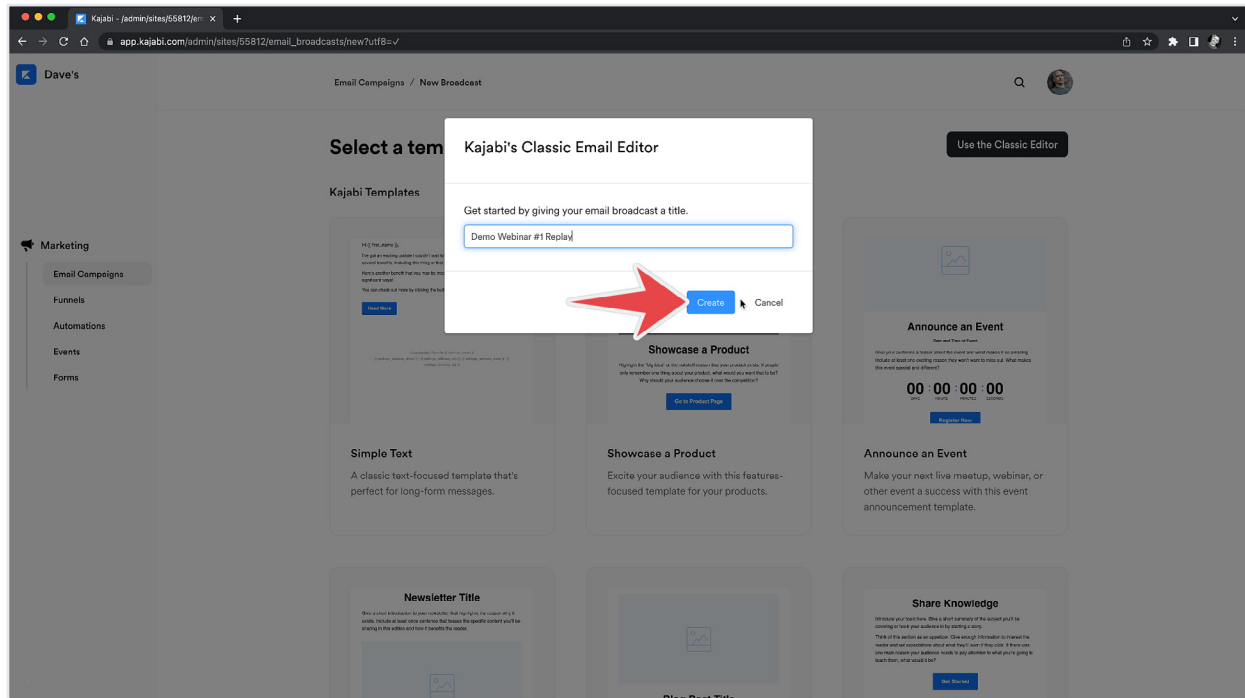


Once again, Kajabi's going to ask you to select a **template** or you can use the **Classic Editor** for your broadcast. I demonstrated the template option for your automated sequence. So for broadcasts, I'm going to demonstrate the **Classic Editor**. You can use whichever one you prefer for both your automated sequence welcome email and your email broadcasts.

Click on the **Classic Editor** button:

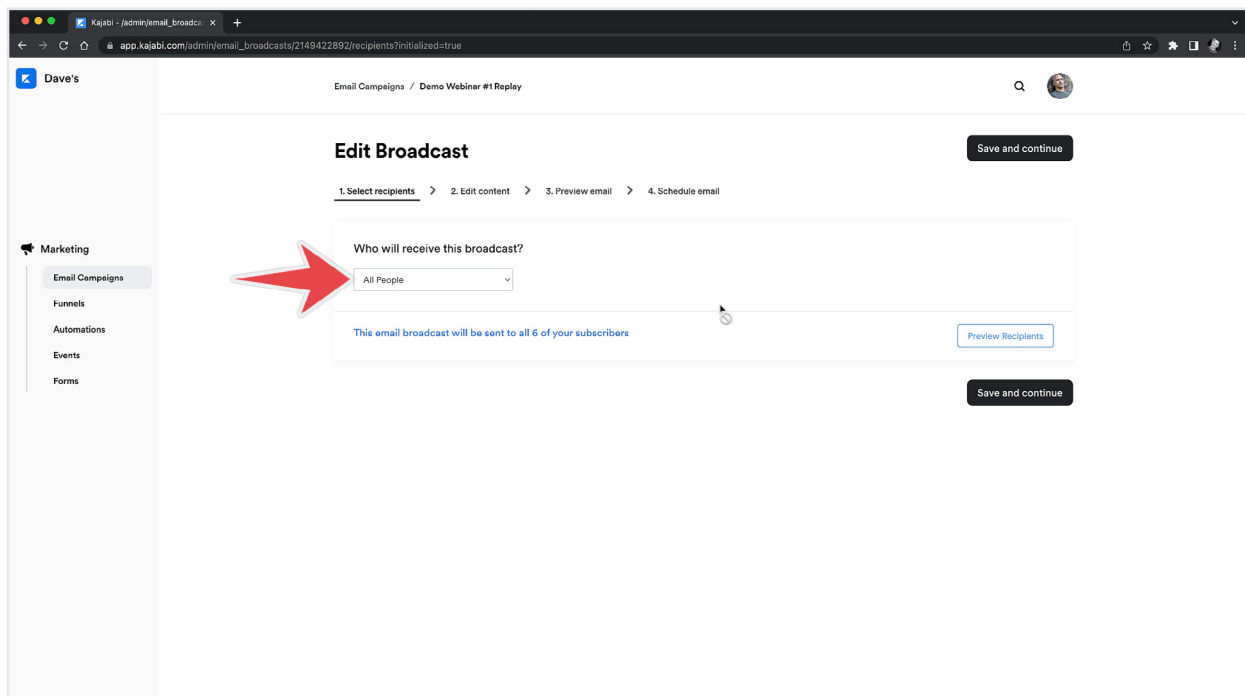


Enter a title for your broadcast. In this example, I'm sending a webinar replay email for my first webinar, so I'm naming it accordingly and then click **Create**:

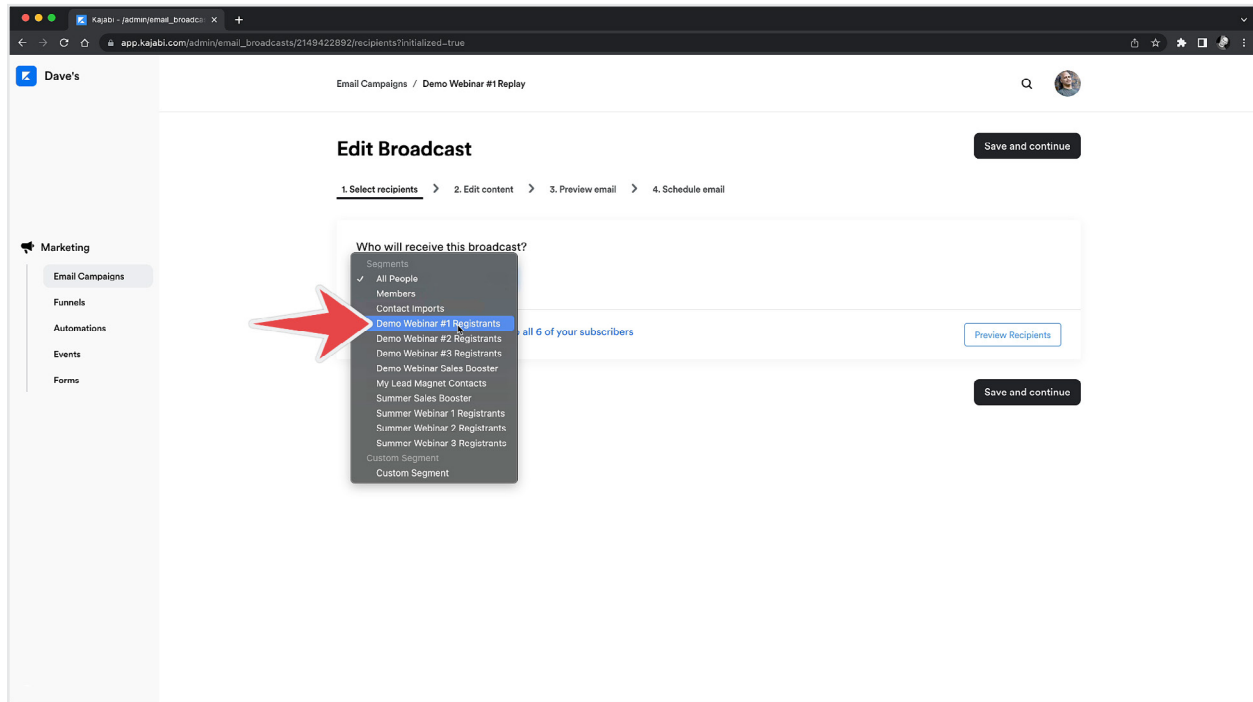


Next Kajabi is going to ask, **“Who will receive this broadcast?”**. And this is where all that work you did setting up segments is going to come into play.

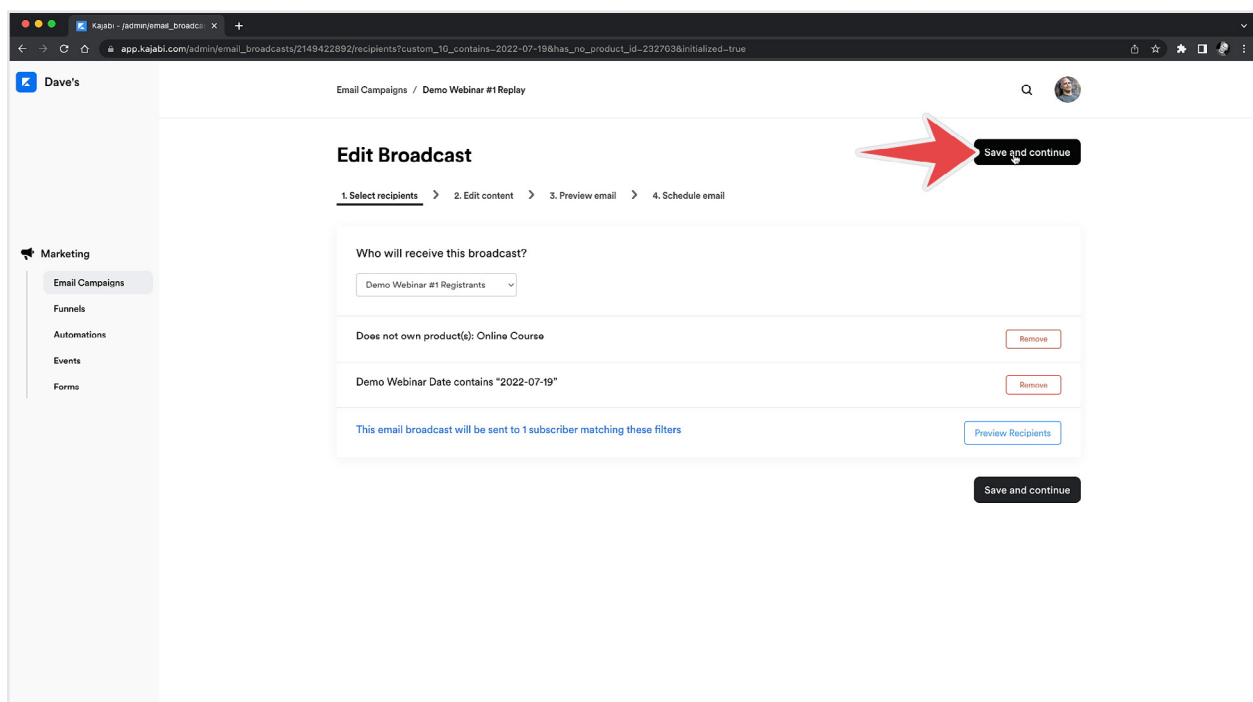
By default, Kajabi wants to send it to everyone in your list:



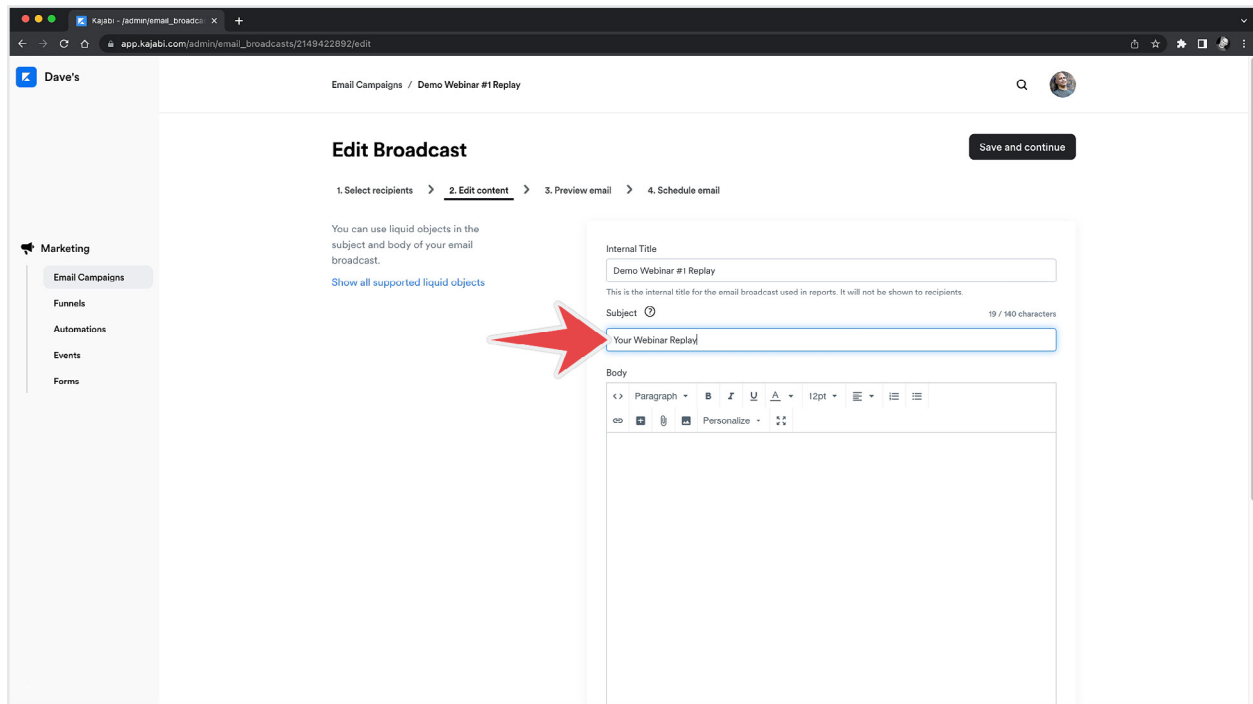
But in this example, I only want to send it to the registrants of my first webinar. And guess what? I already have a segment for those people. So in the dropdown, I select that segment (you would select the segment that you want your broadcast to go to):



Then click **Save and Continue**:



Now it's time to add the content for your email. First enter your **Subject**:



The screenshot shows the 'Edit Broadcast' interface in the Kajabi admin panel. The breadcrumb trail is 'Email Campaigns / Demo Webinar #1 Replay'. The left sidebar shows 'Marketing' with 'Email Campaigns' selected. The main content area has a 'Save and continue' button and a progress bar with four steps: '1. Select recipients', '2. Edit content', '3. Preview email', and '4. Schedule email'. Below the progress bar, there is a note about liquid objects and a link to 'Show all supported liquid objects'. The 'Subject' field is highlighted with a red arrow and contains the text 'Your Webinar Replay'. The 'Internal Title' field contains 'Demo Webinar #1 Replay'. The 'Body' field is empty and has a rich text editor toolbar above it.

Internal Title
Demo Webinar #1 Replay

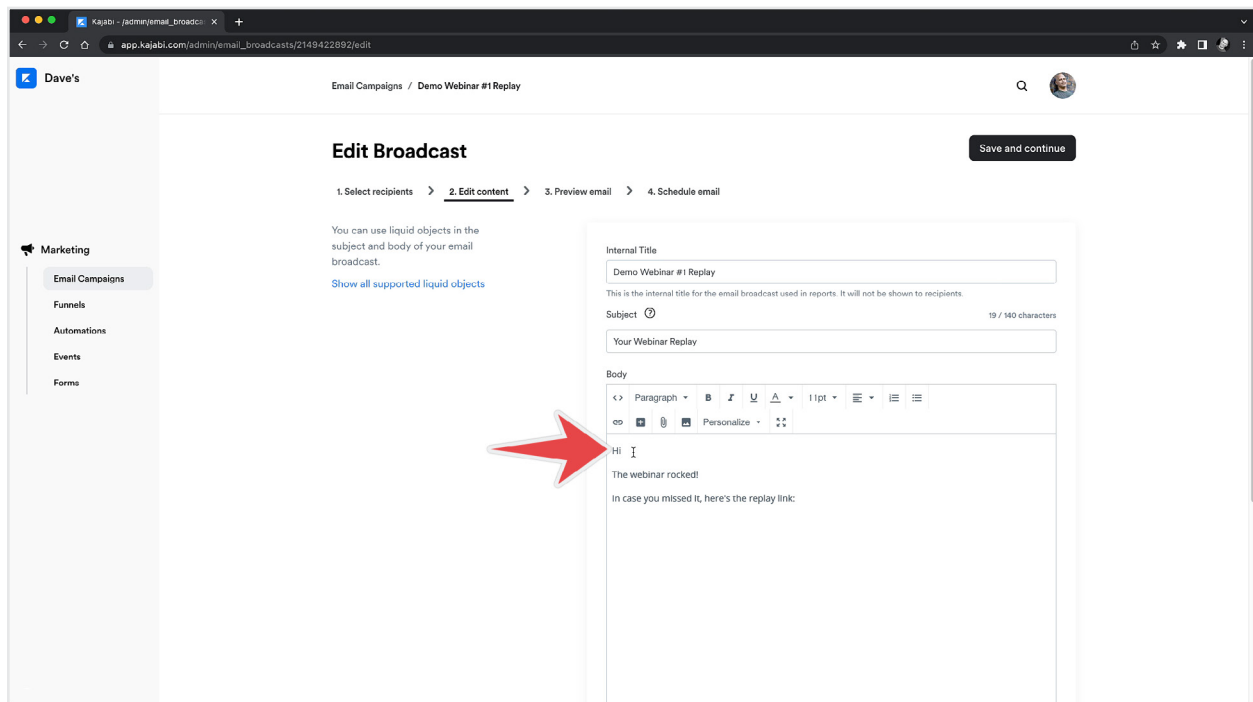
This is the internal title for the email broadcast used in reports. It will not be shown to recipients.

Subject 19 / 140 characters
Your Webinar Replay

Body

Paragraph B I U A 12pt

Then enter your **Body** copy:



The screenshot shows the 'Edit Broadcast' interface in the Kajabi admin panel, similar to the previous one. The 'Subject' field now contains 'Your Webinar Replay'. The 'Body' field is highlighted with a red arrow and contains the text 'Hi', 'The webinar rocked!', and 'In case you missed it, here's the replay link:'. The 'Internal Title' field contains 'Demo Webinar #1 Replay'. The 'Body' field has a rich text editor toolbar above it.

Internal Title
Demo Webinar #1 Replay

This is the internal title for the email broadcast used in reports. It will not be shown to recipients.

Subject 19 / 140 characters
Your Webinar Replay

Body

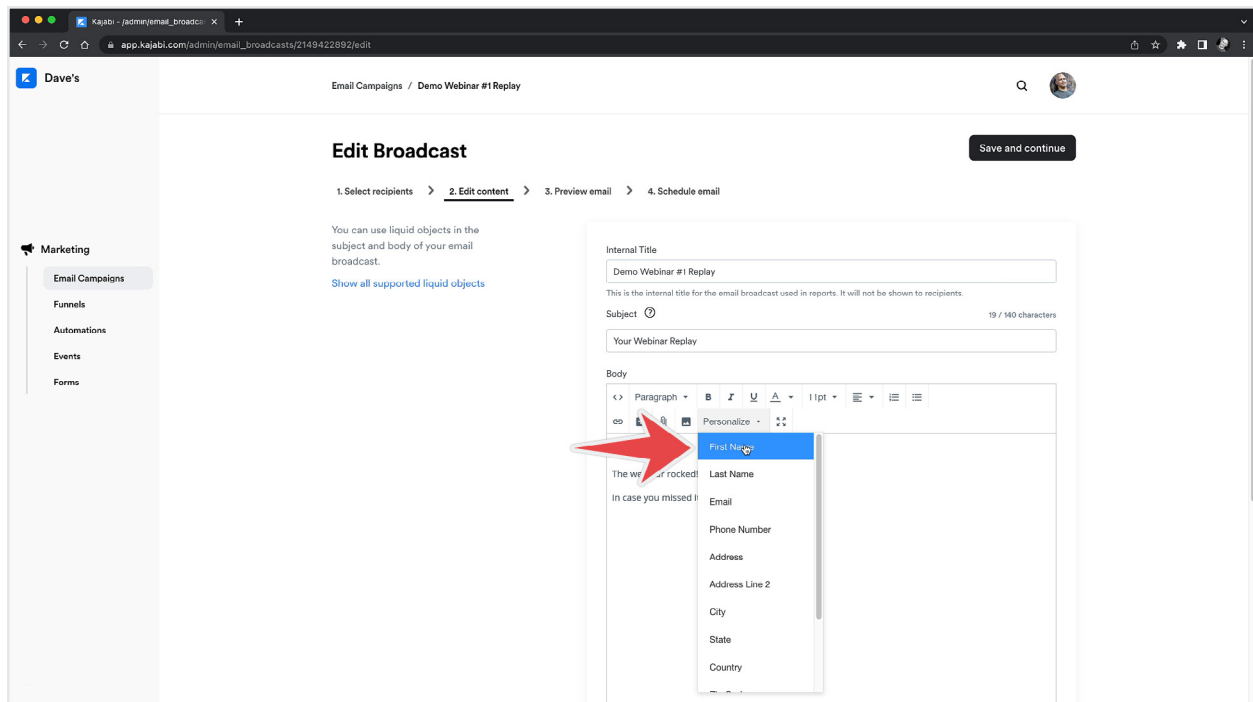
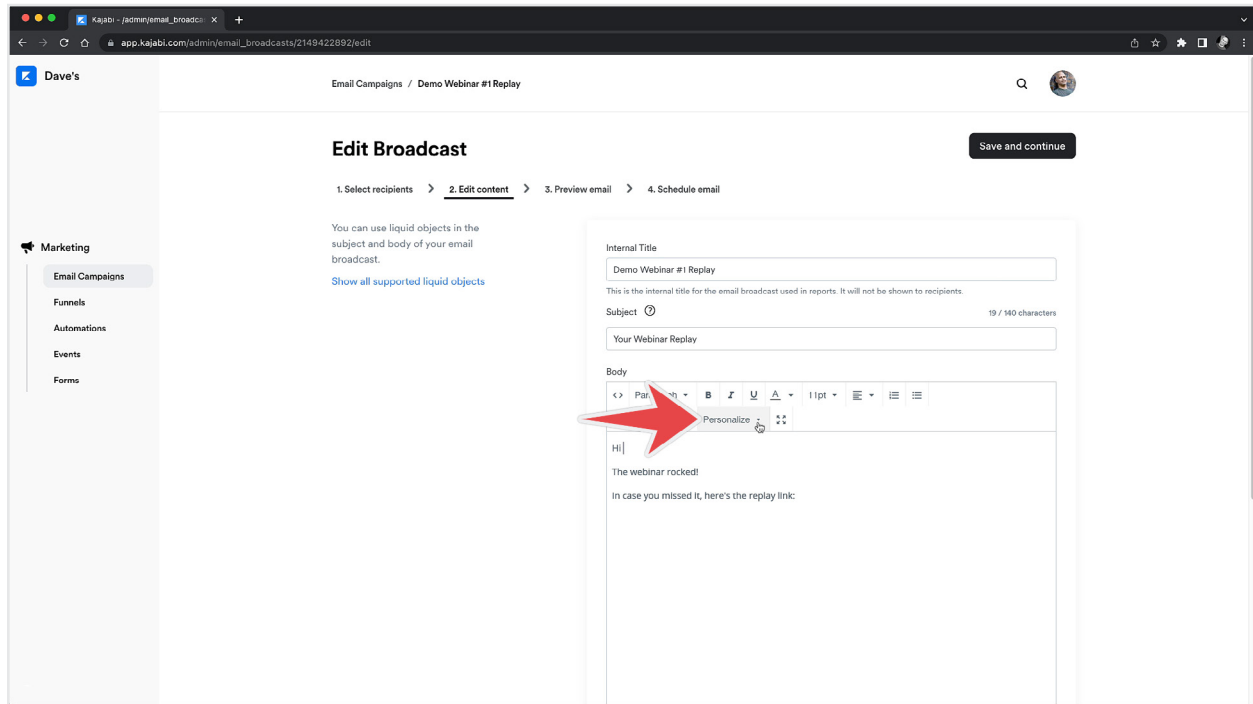
Paragraph B I U A 12pt

Hi

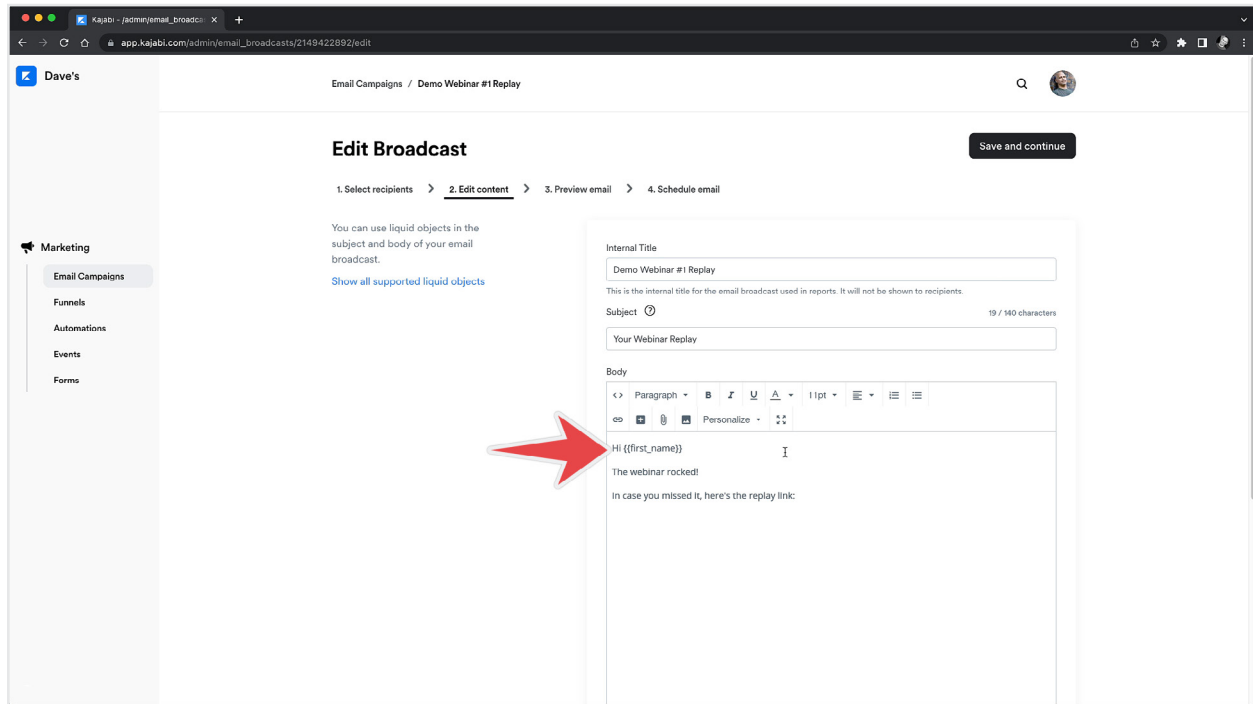
The webinar rocked!

In case you missed it, here's the replay link:

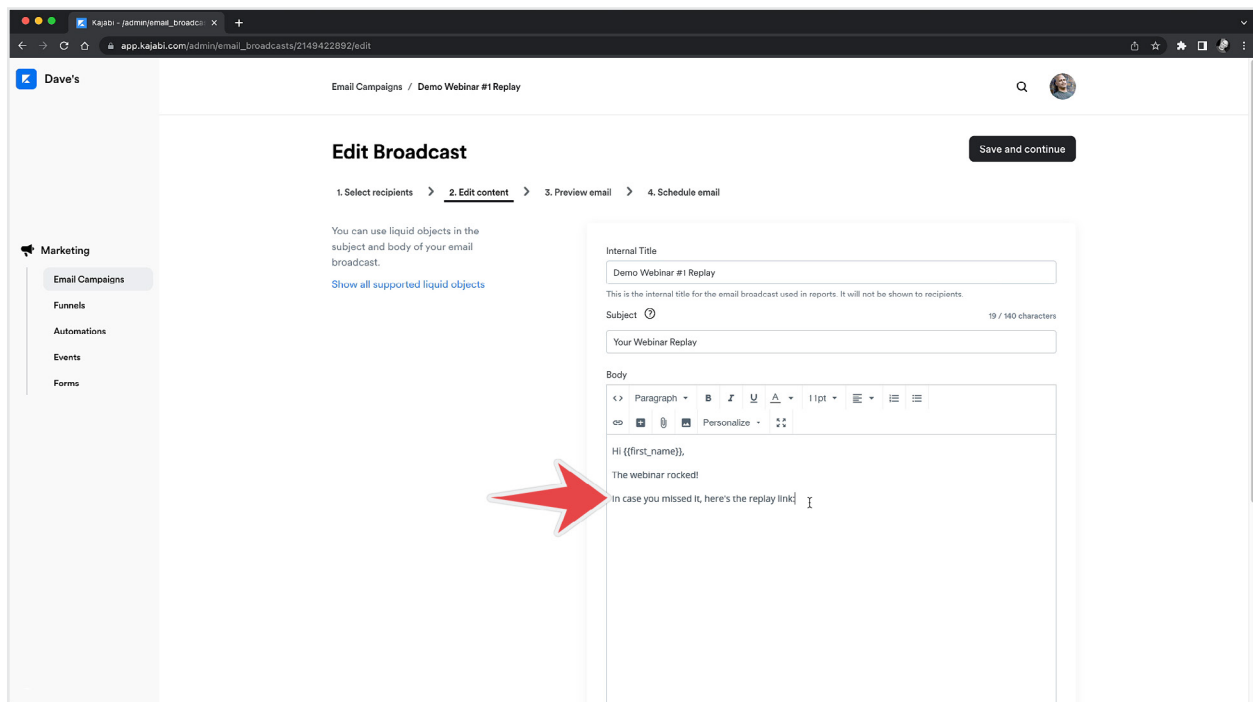
Now let's say that you want to list the person's first name in the email. To do that, click on **Personalize** and then select the **First Name** option:



You'll see a token or place holder text that gets added to the email. Kajabi will replace this with the recipients actual name when it sends the email:

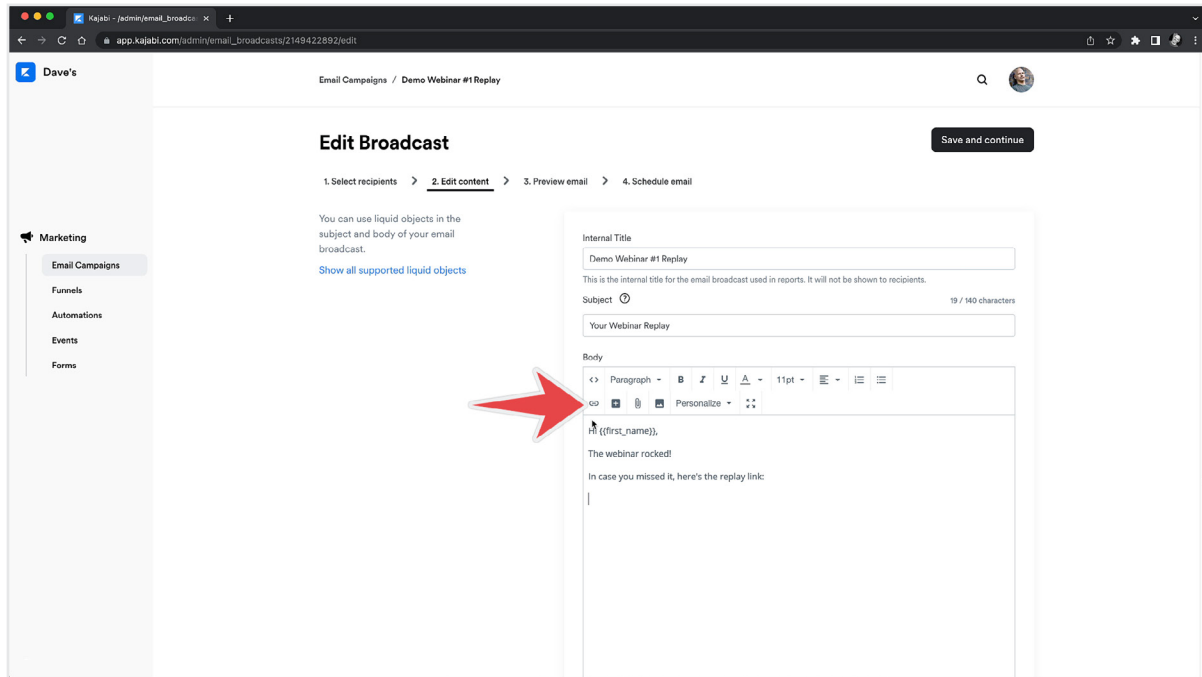


In this example, I'm including a link in the email to a webinar replay page:

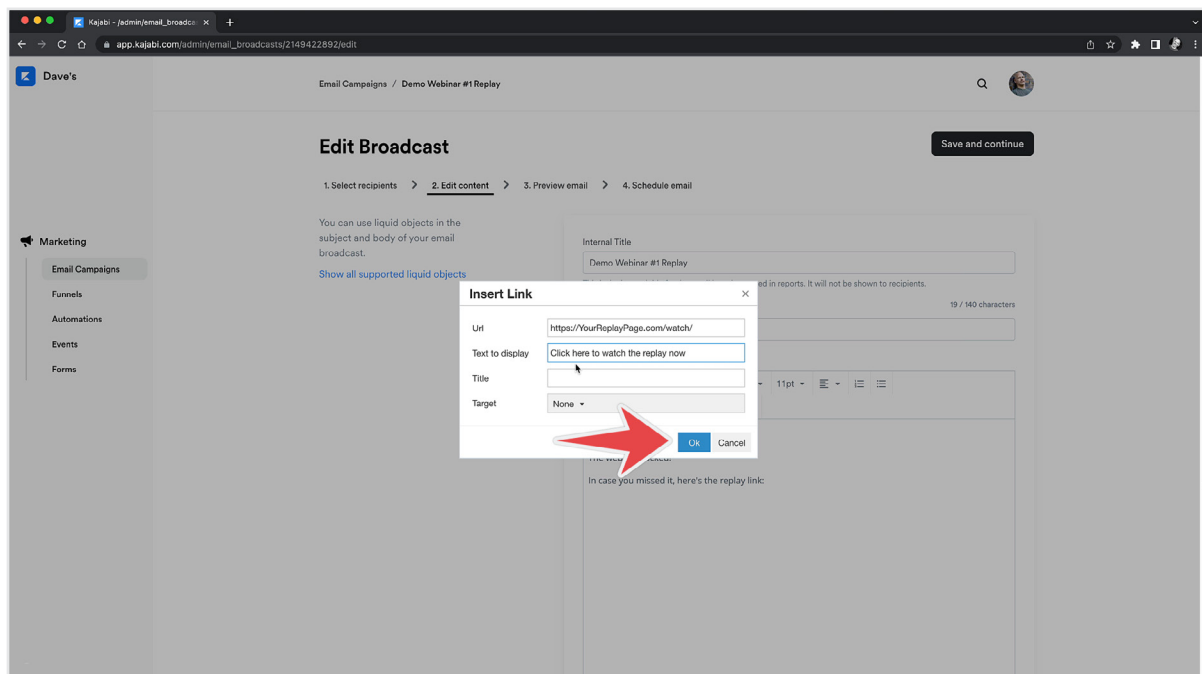


There is additional training in DCA that shows you how to create a webinar replay page. So right now, I'm going to show you how to add a link to your emails.

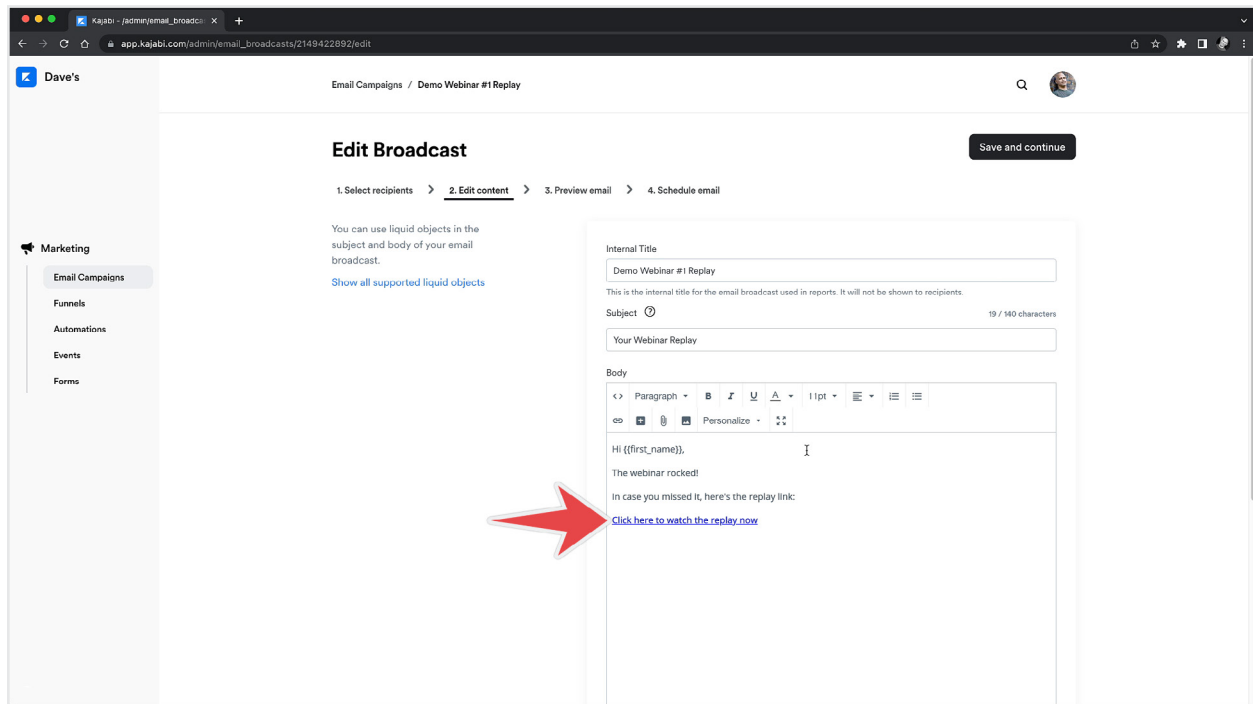
To insert a link, click on the link icon:



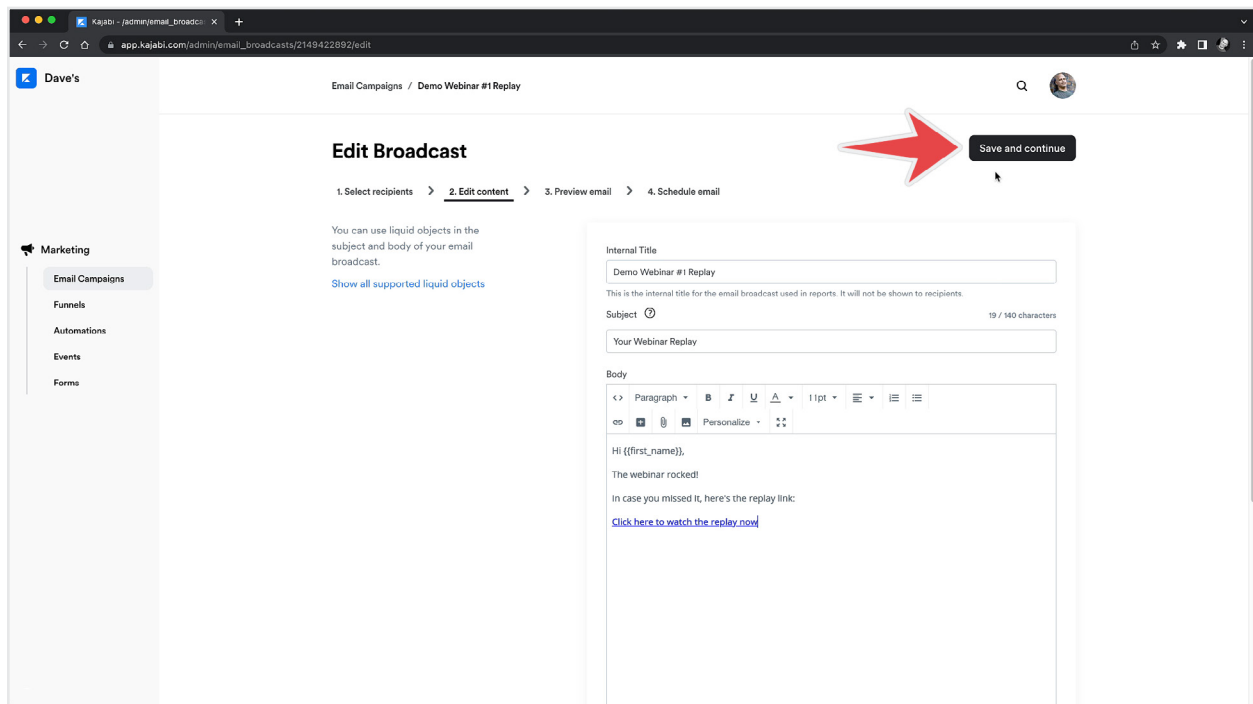
A dialog will appear asking you to enter the **URL for the link** and the **text for the link**. After you've entered these, click on **OK**:



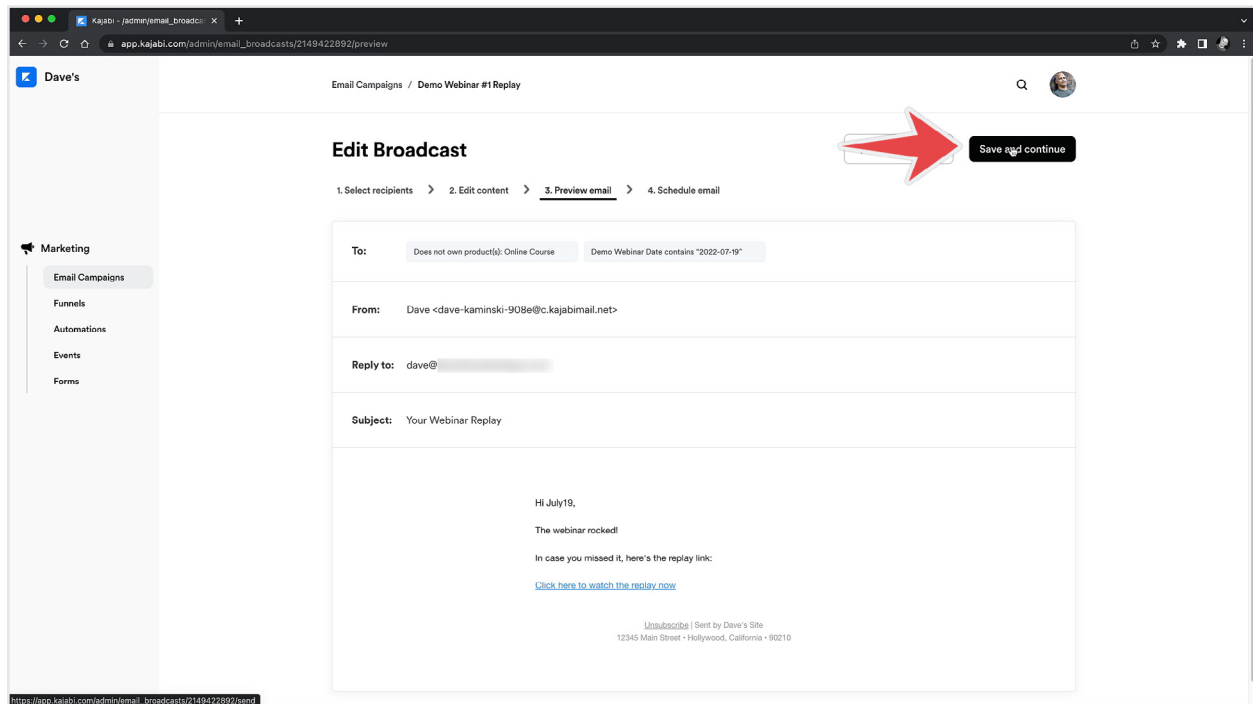
And now you can see how that link has been added to the email:



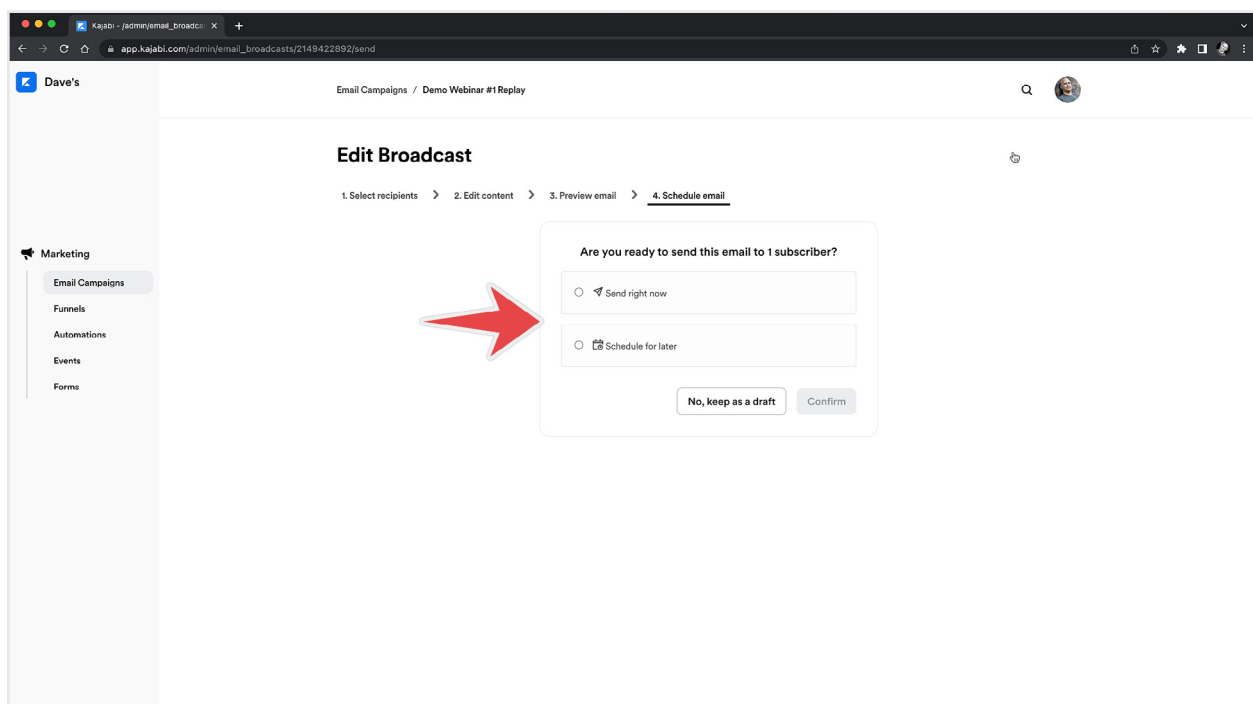
When you're done with the content for your email, click **Save and Continue**:



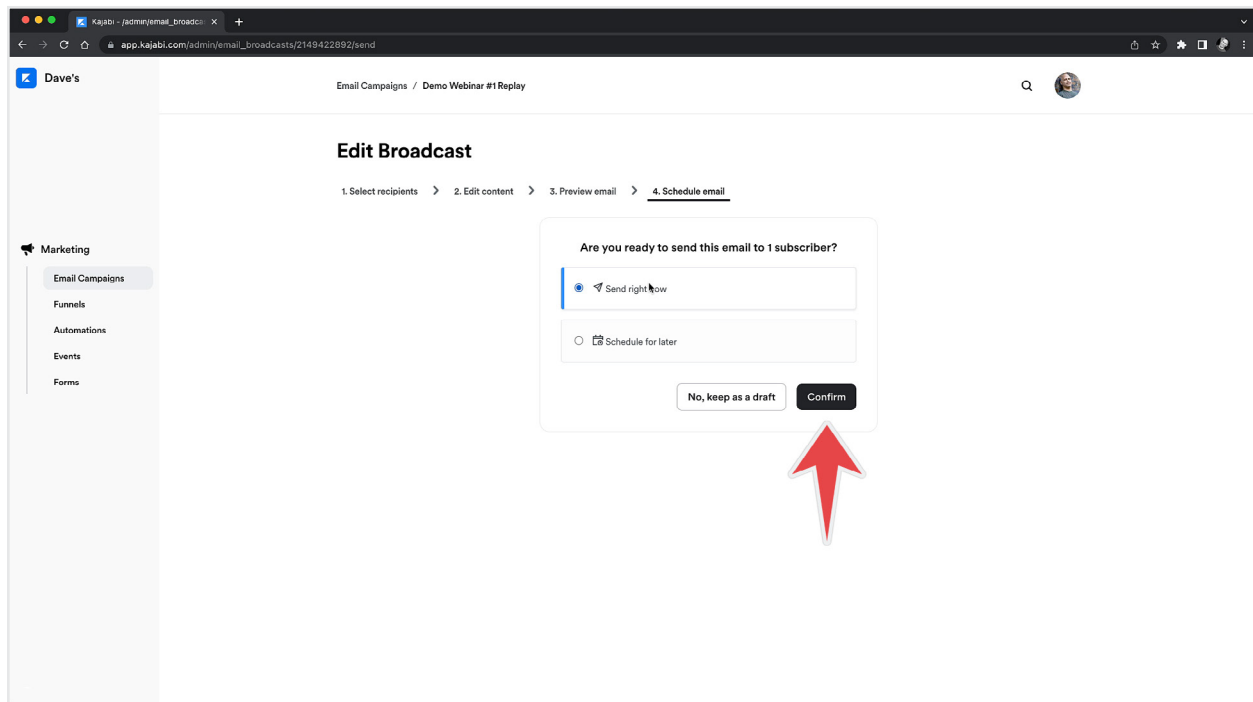
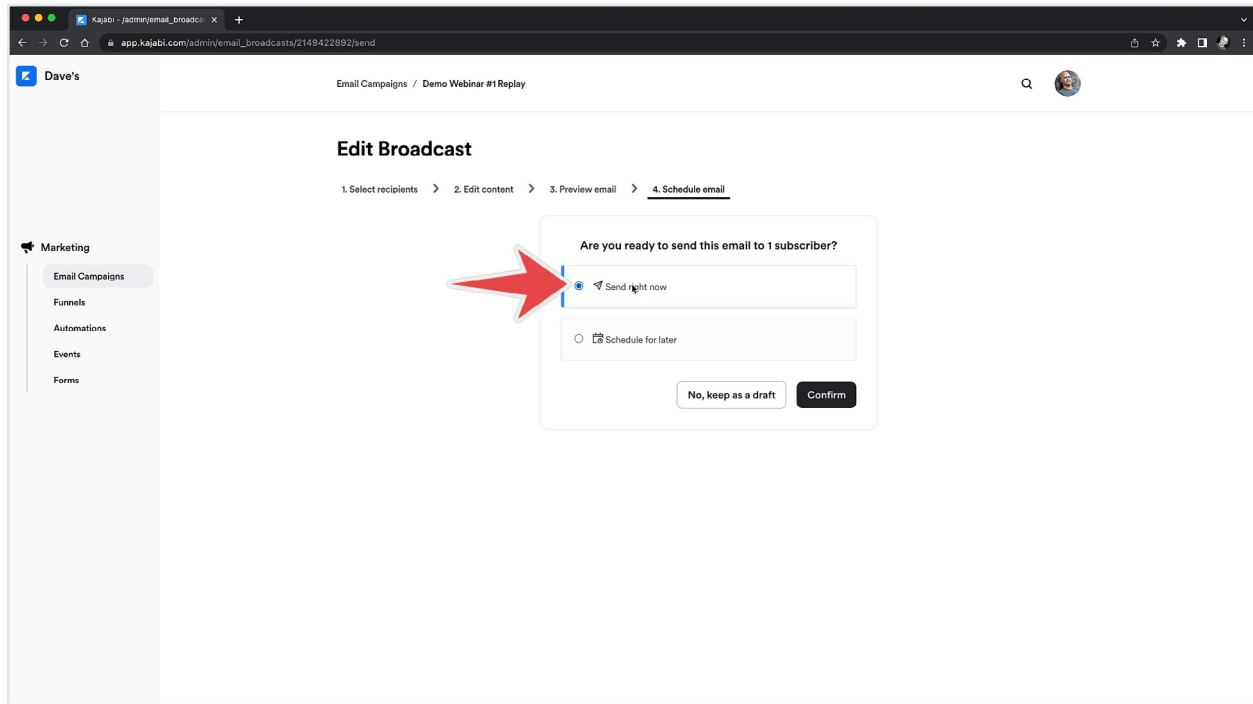
You will see a preview of your email, click **Save and Continue**:



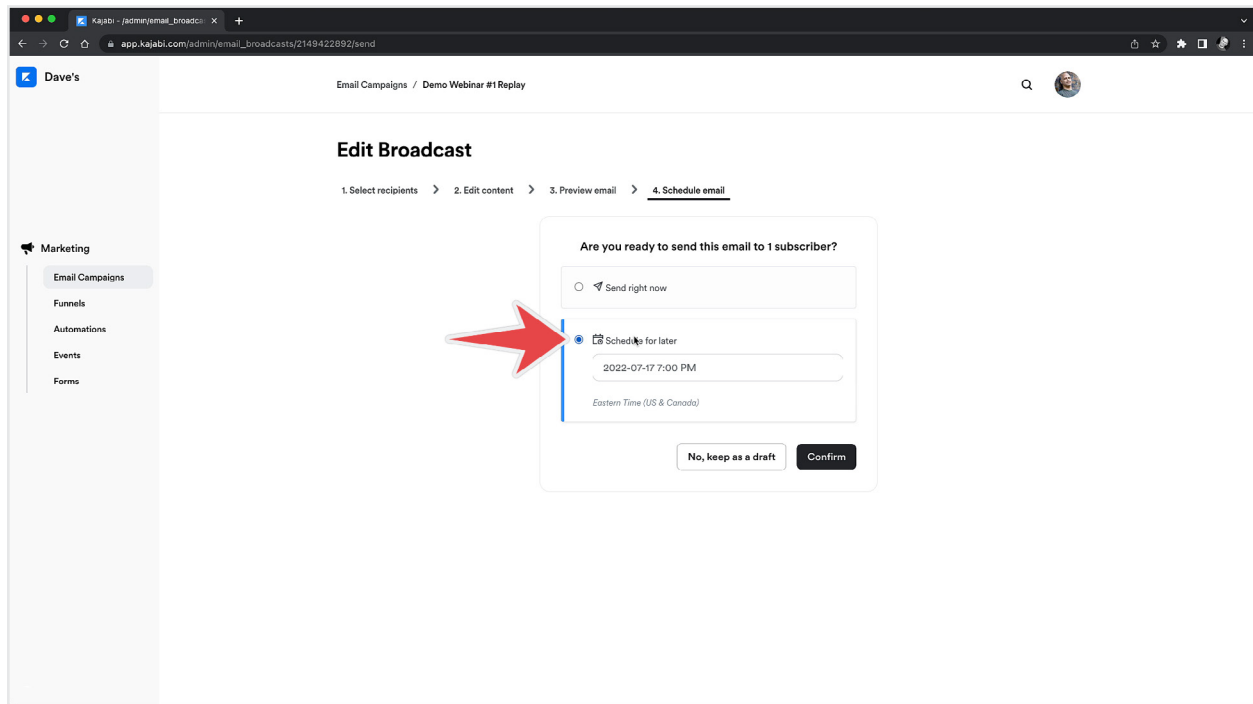
Then you'll be asked if you want to send the email **right now** or at a **future date and time**. You can use whichever option you prefer. However, if you prefer writing all of your emails in advance and having them loaded up to be sent out in the future, then the future date and time option would be best for you:



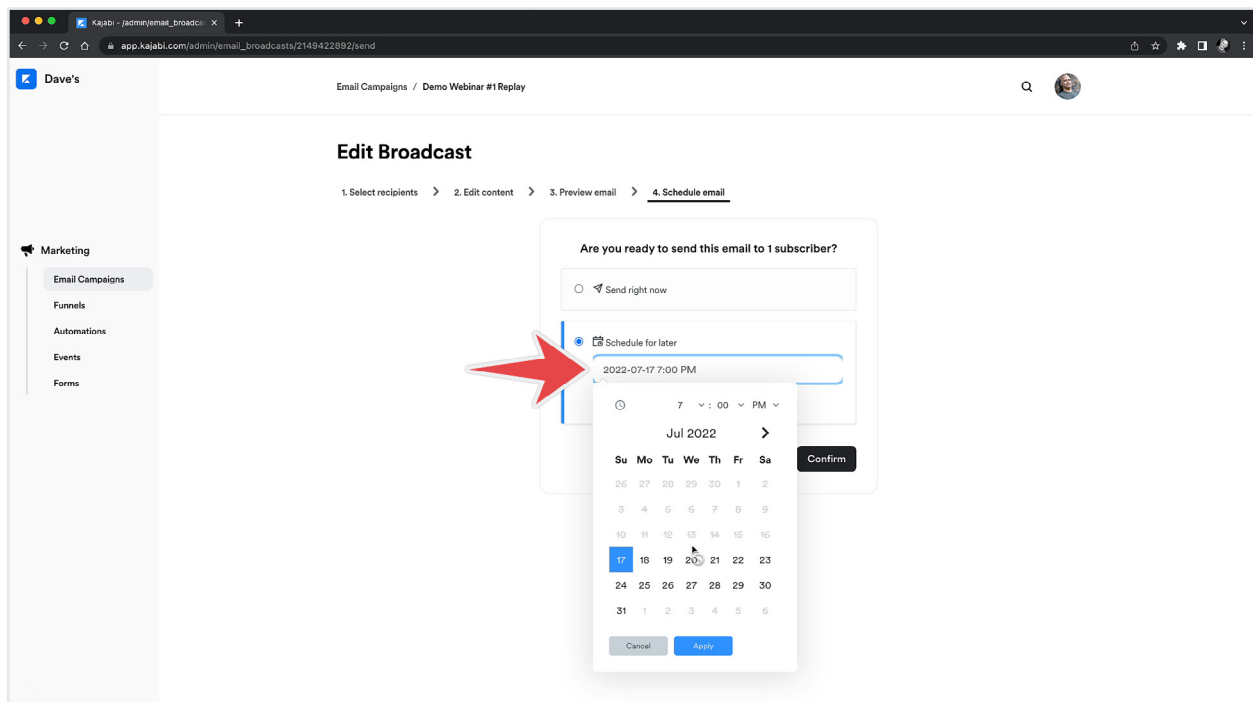
To send your email broadcast right now, just select that option and click **Confirm**:

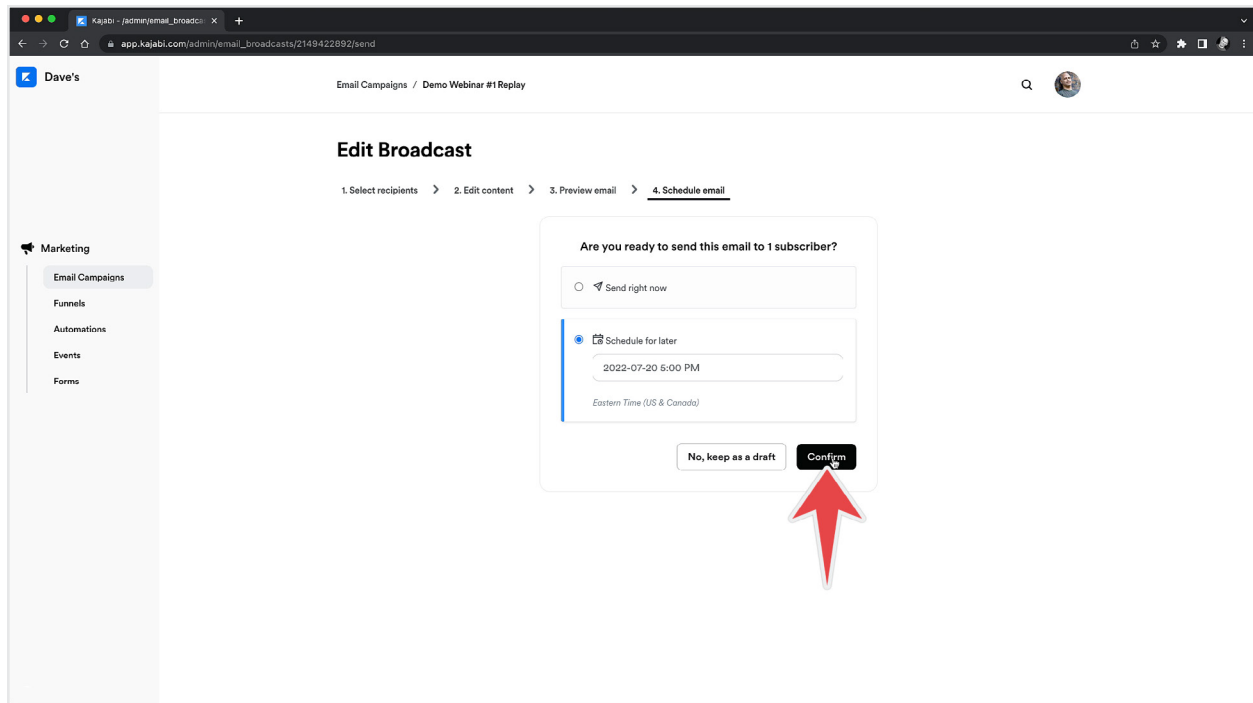


If you want to **schedule the broadcast for later**, select that option:

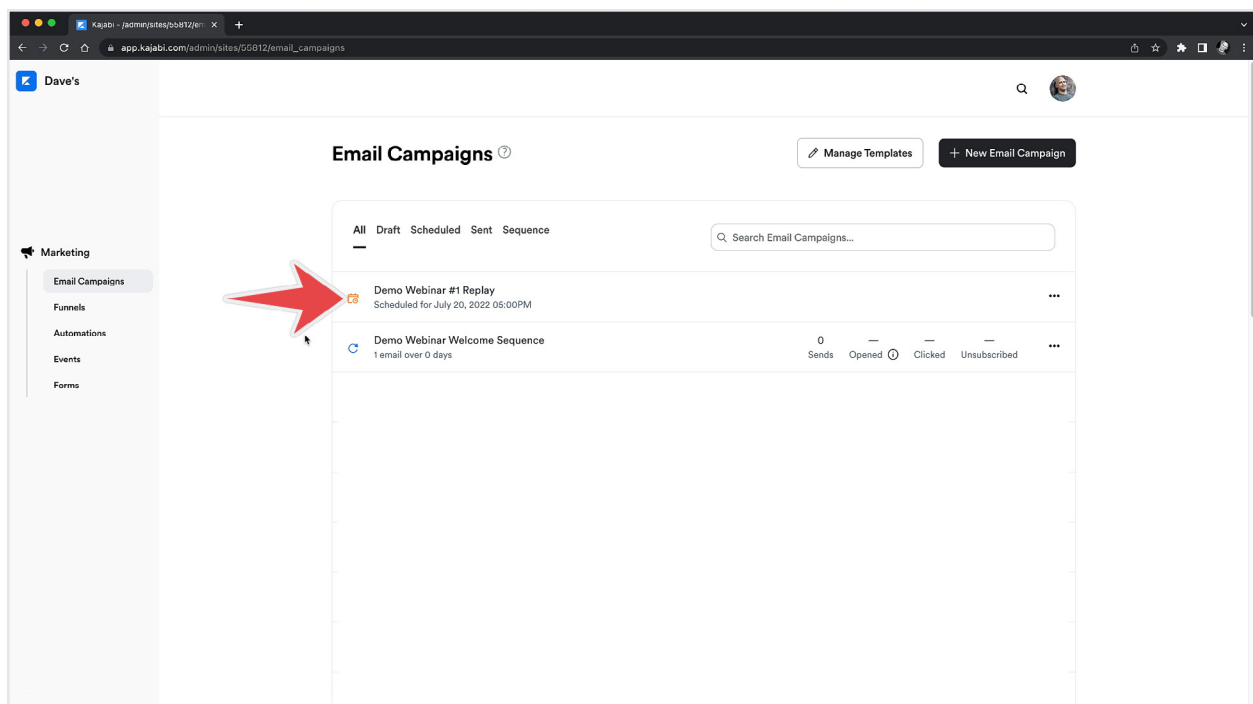


And then in the calendar that appears, select the date and time for the broadcast to be sent and click **Confirm**:



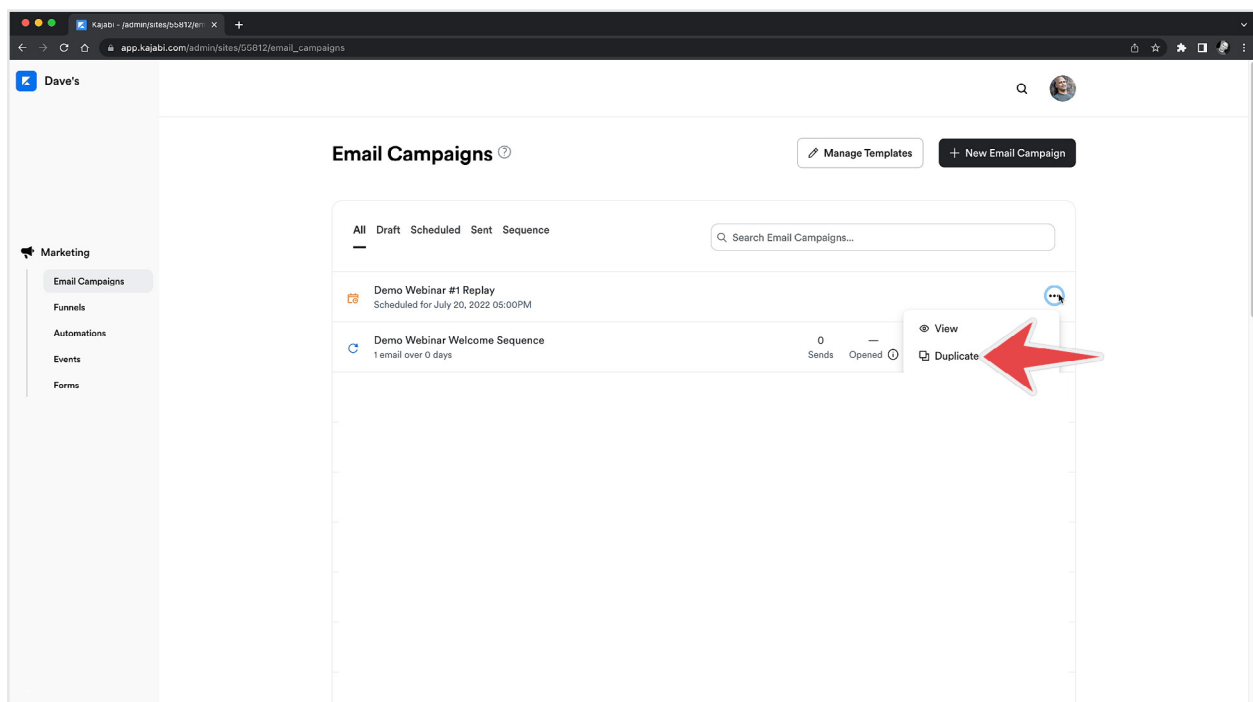
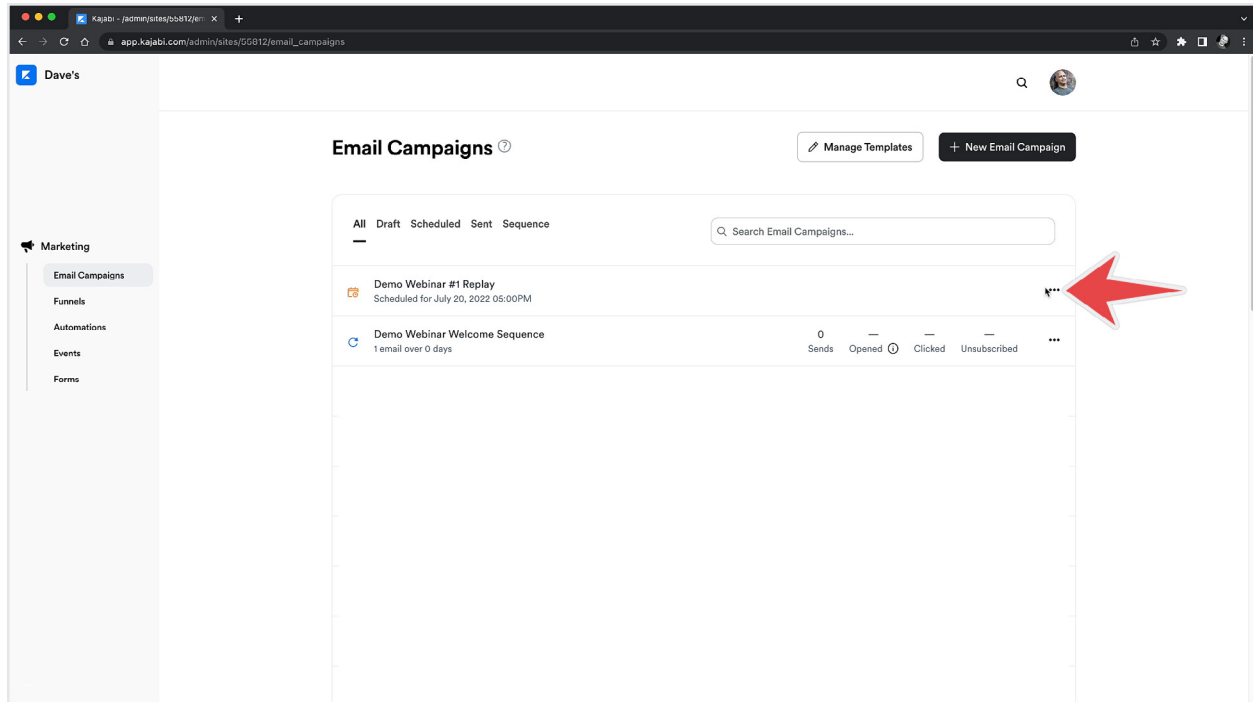


And then you can see in the list of email campaigns, that your broadcast has been scheduled:

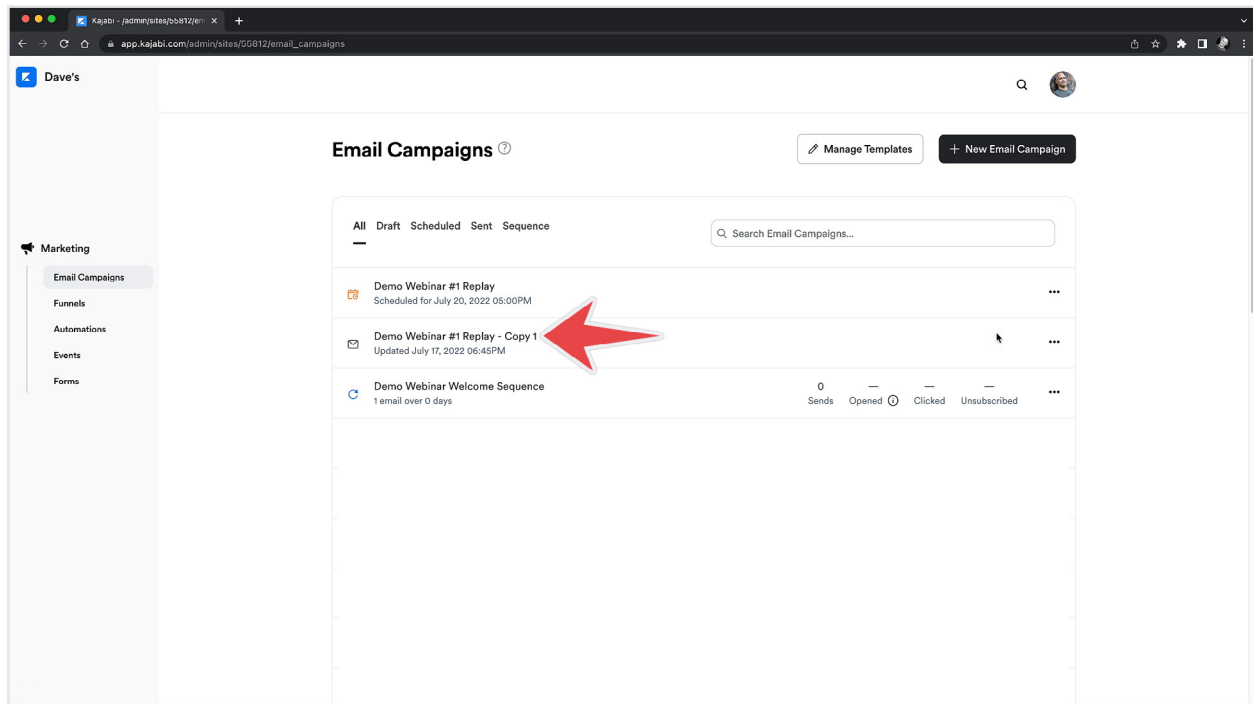


You will then repeat this same exact process for all other emails in Amy's framework.

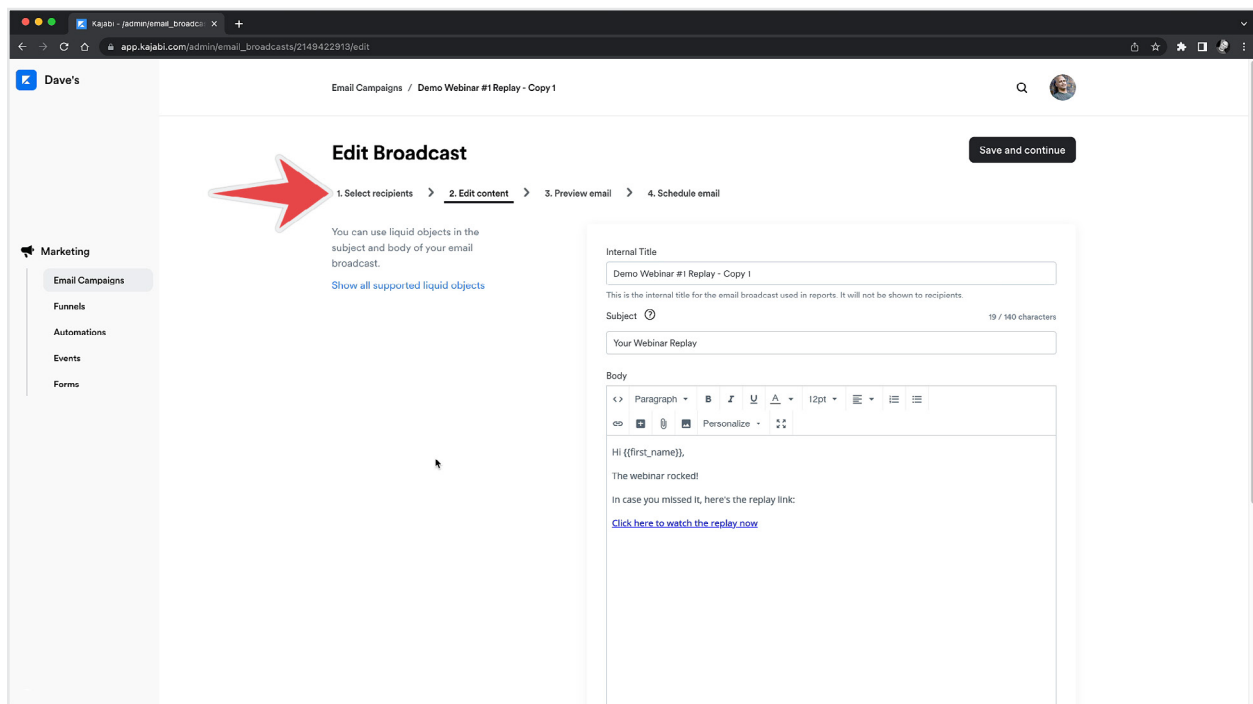
But because you'll be sending out so many emails, here's a tip that can save you some time. In this example, I prepared a webinar replay email that is sent to the registrants of my first webinar. And I'm going to need to send a similar email to the registrants of my second webinar. Rather than creating that email from scratch, what you can do is go to the **3 horizontal dots** next to the email, click and choose **Duplicate**:



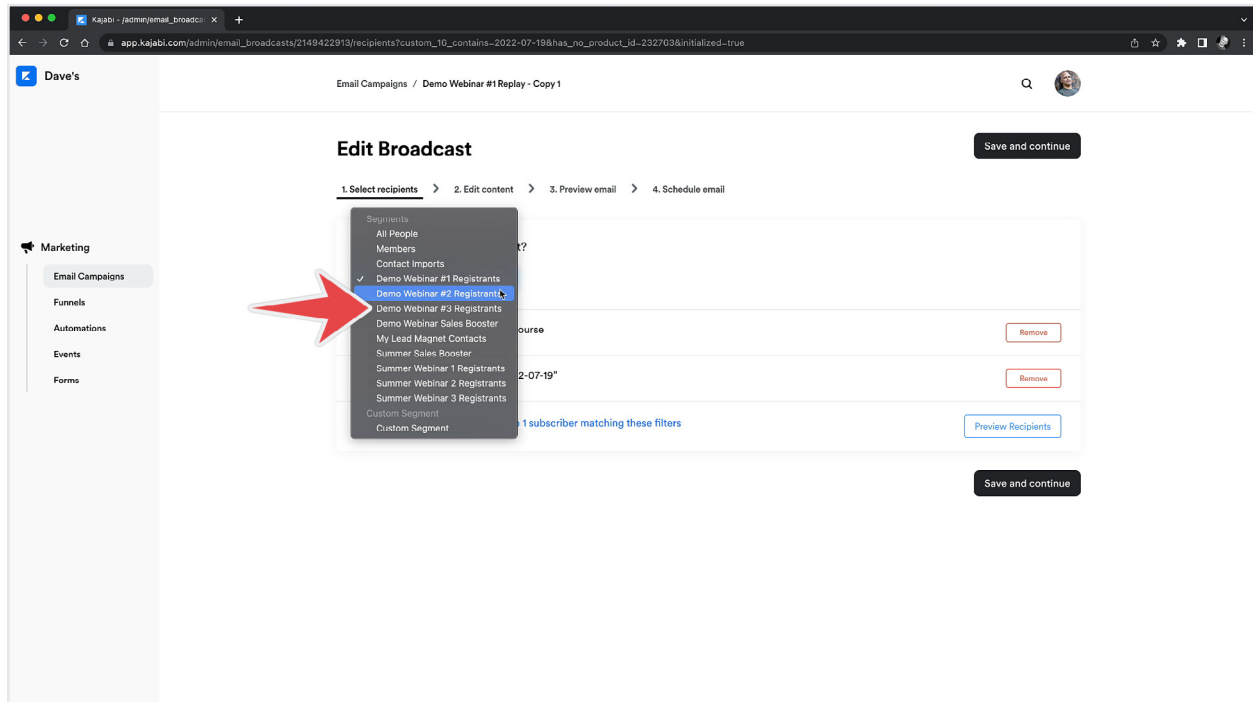
That duplicate email will appear in the list, so click on it:



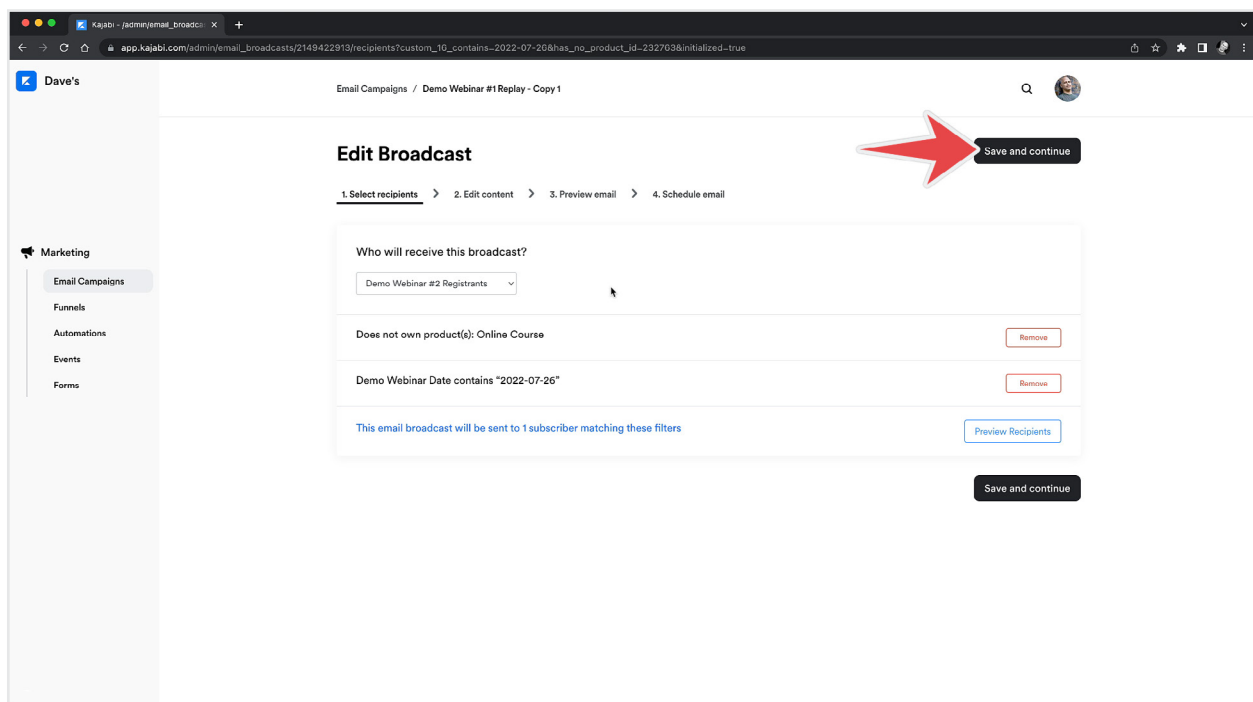
When that email opens up, Kajabi will want you to edit the content right away. But first, you need to change who is receiving the email. So click on **Select Recipients:**



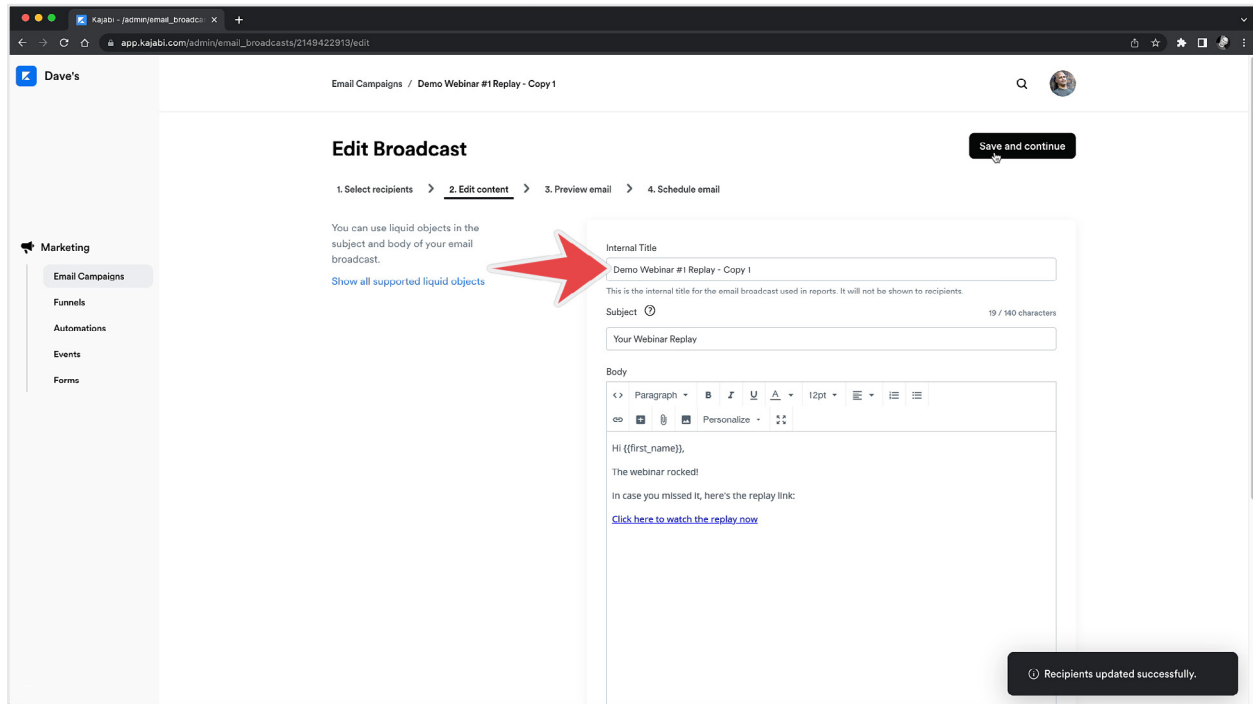
From the dropdown, select the segment you want to send the email to. In this example, I am sending it to the registrants of my second webinar:



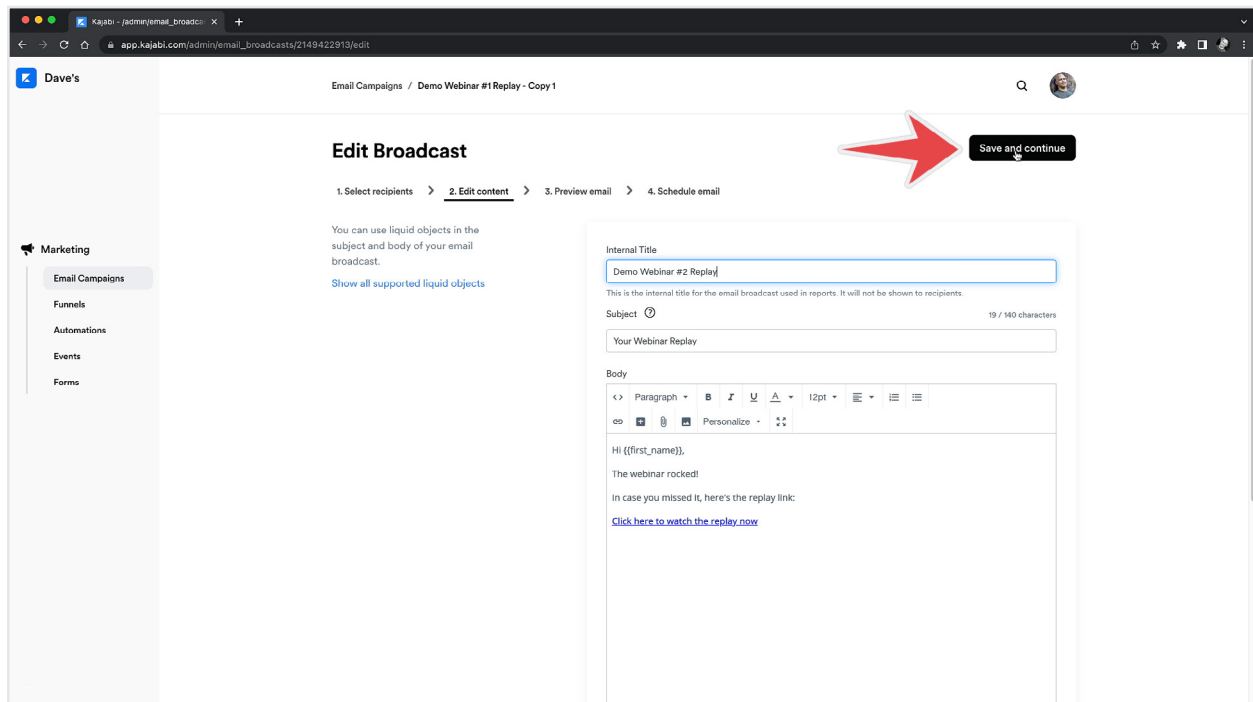
Then click on **Save and Continue**:



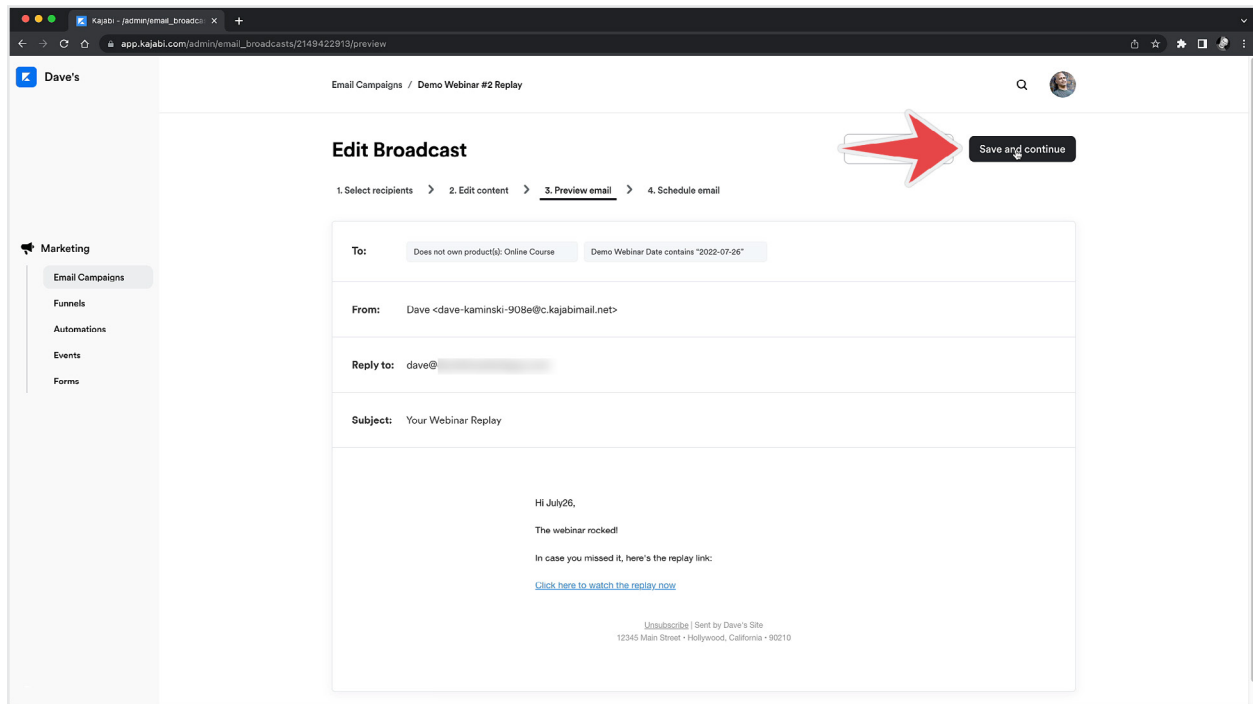
Next, change the **Internal Title** of the email to something that makes sense to you:



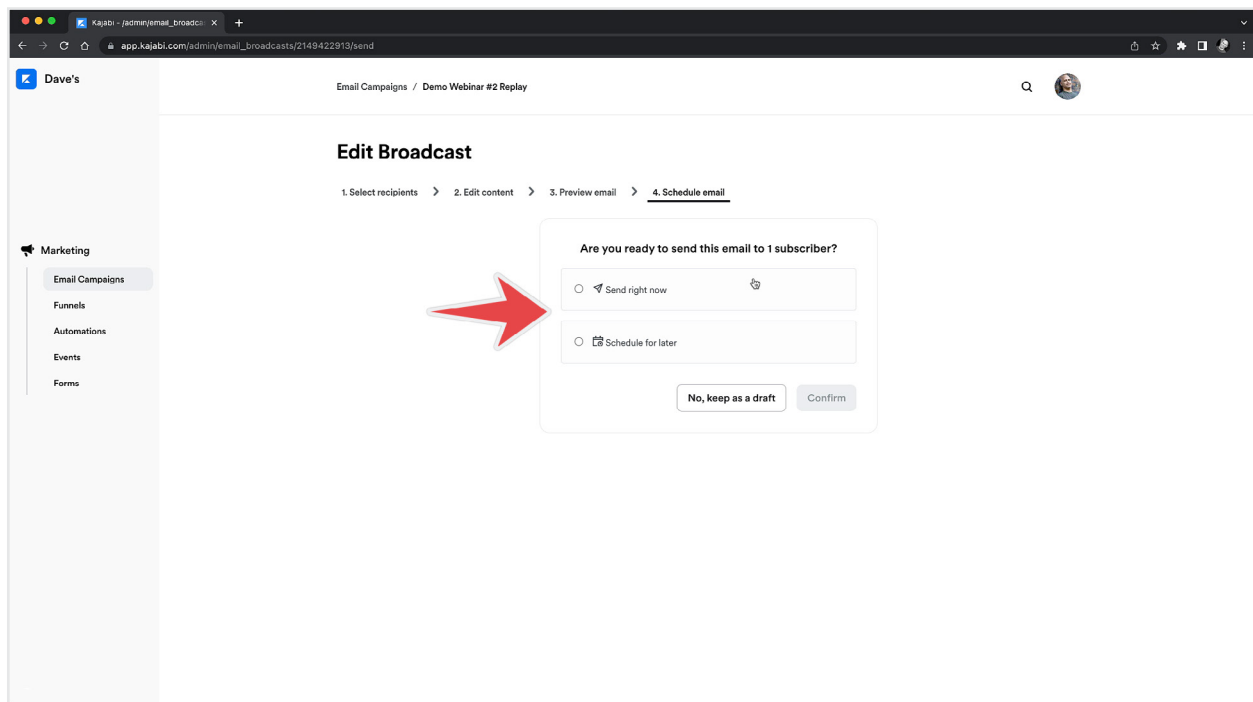
Then you would change any body copy or links for the email and then click on **Save and Continue**:

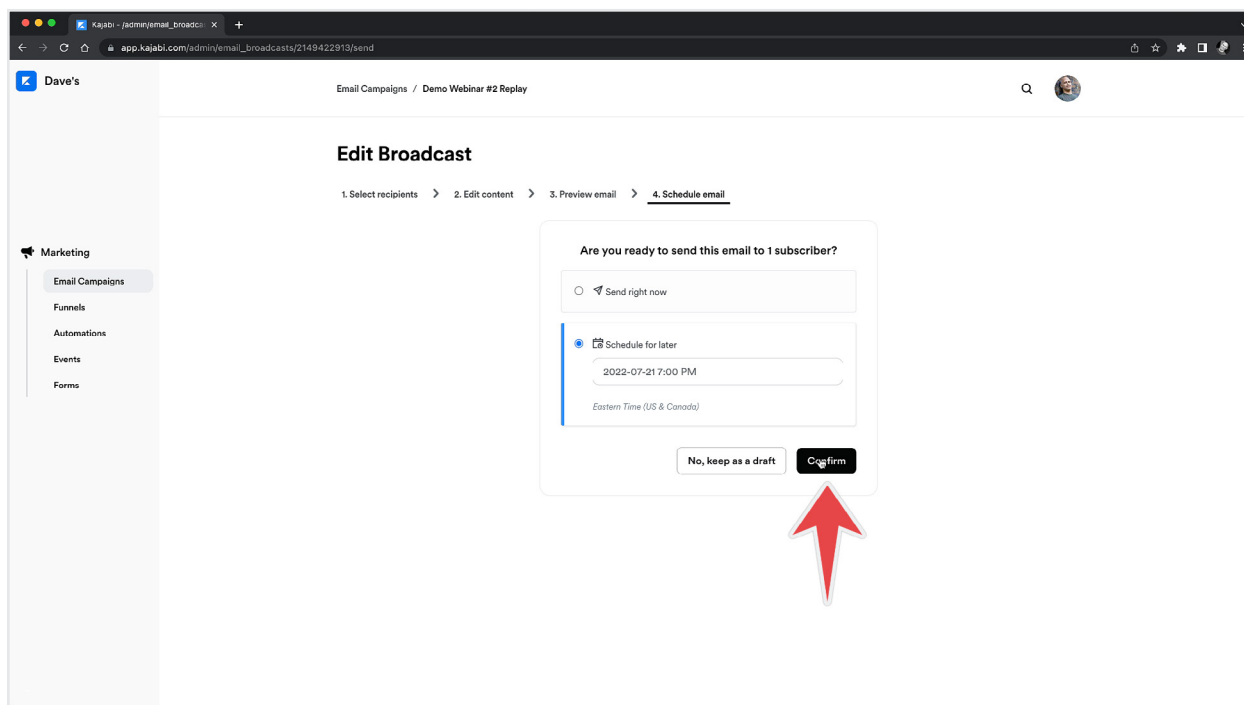


Click **Save and Continue** once more:

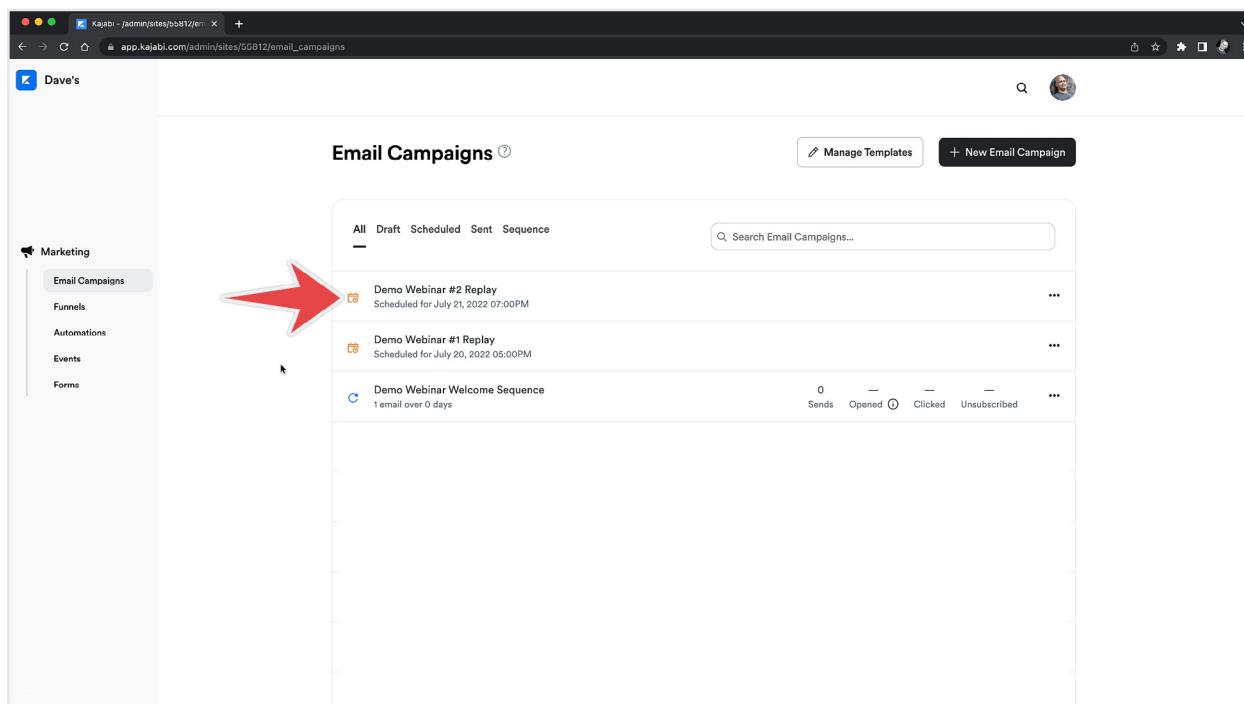


And finally, you could send this email right now or schedule it for a future date and time, which is what I've done here:





And now you can see all of your emails in the list. In this example, I have my webinar welcome email, my webinar replay email for my first webinar registrants and my webinar replay email for my second webinar registrants:



And guess what? That's it. So, congratulations! Now you know how to use Kajabi for sending all of the emails for your live webinar course launch.

STEP 3

Setting Up Your Pre-Webinar, Post-Webinar and Sales Booster Emails Using ConvertKit As Your Email Provider

In **Step 3**, you will be learning how to use ConvertKit to set up and send all of the emails for your live webinar course launch.

With Amy's framework, there will be many emails being sent to different groups of people. For example, there will be pre-webinar emails, post-webinar emails and sales booster emails.

Some emails will be sent to your first webinar registrants, some to registrants of your second webinar and some to people who never even registered for any of your webinars. It will be a lot of emails, but just relax and follow along with this guide.

You also need to be aware of how emails will be sent, as it can happen in two different ways.

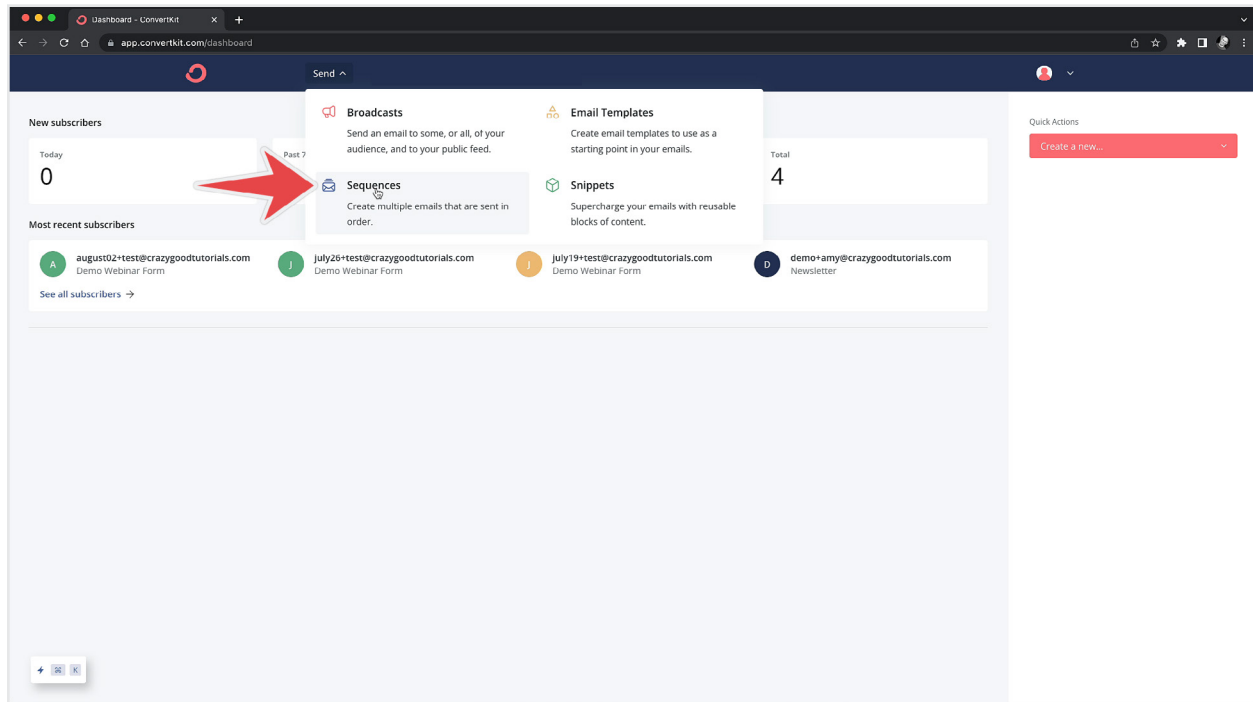
First, you have **automated sequences**. This is where an email is automatically sent based on a trigger. For example, you visit a website, you see a popup, you enter your email address and then you magically receive an email. That's an automated sequence. You are going to use an automated sequence for only one email in Amy's framework. And that will be the **welcome email** sent after someone registers for a webinar.

All other emails will be sent by **broadcast**. A broadcast is an email that is only sent one time to a specific group of people. It is sent at the exact date and time you want to send it.

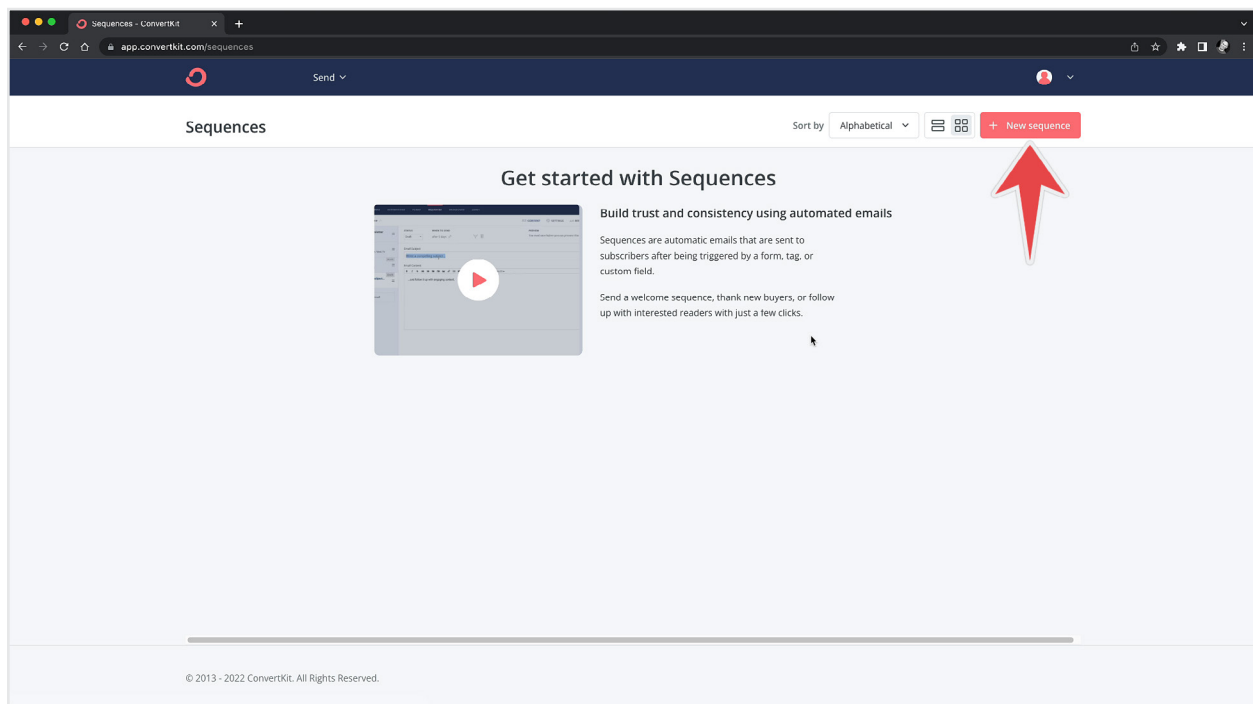
Then there's Demio, who will be sending your registrants reminder emails with the webinar link on the days of your webinar. These emails are not sent through ConvertKit, so you don't need to worry about them.

In this guide, I won't be showing you how to do each and every email in Amy's framework. Instead, I'll be showing you the process to use for one email, which you can then repeat for all the others.

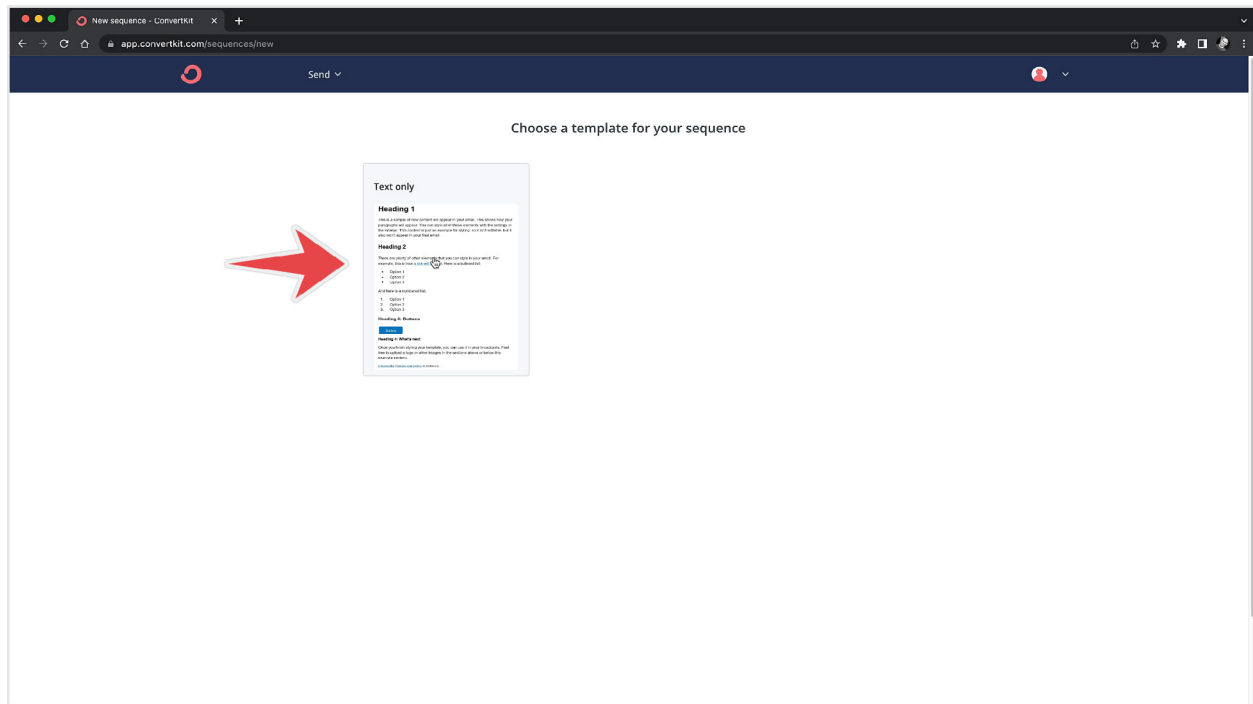
The first thing you're going to do is set up the automated sequence for your welcome email. So from the menu at the top, click on **Send** and select **Sequences**:



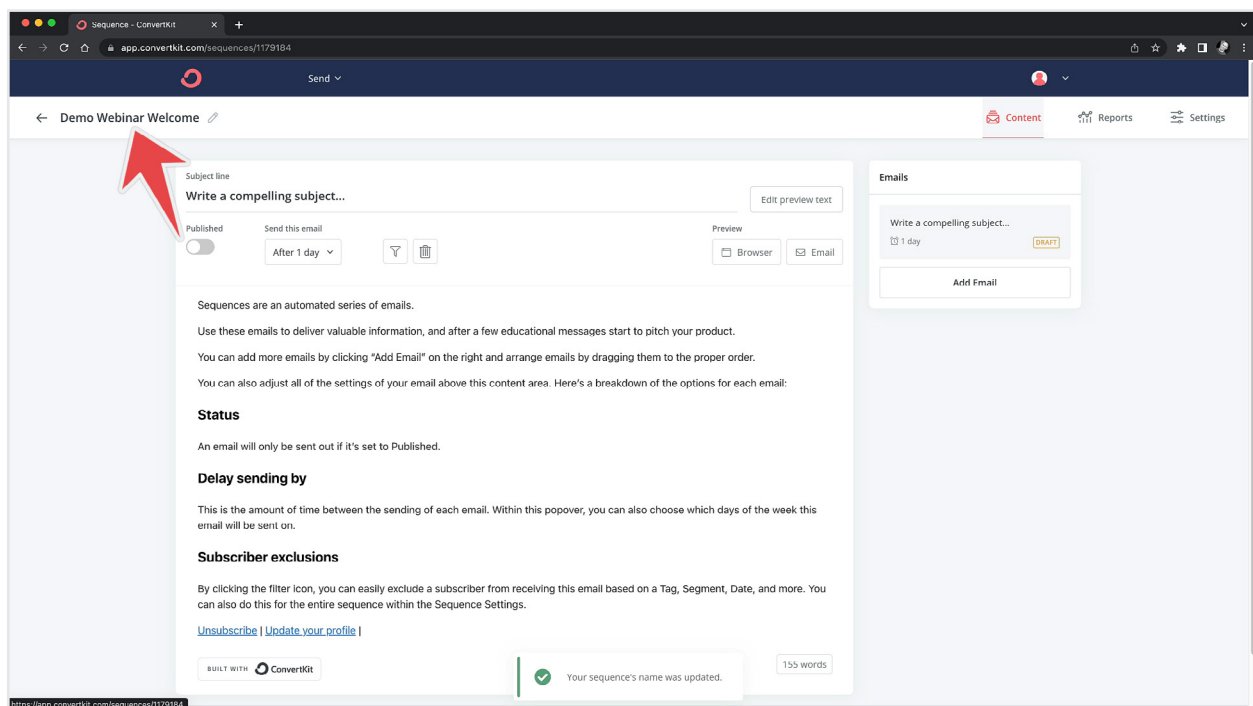
Then click on **New Sequence**:



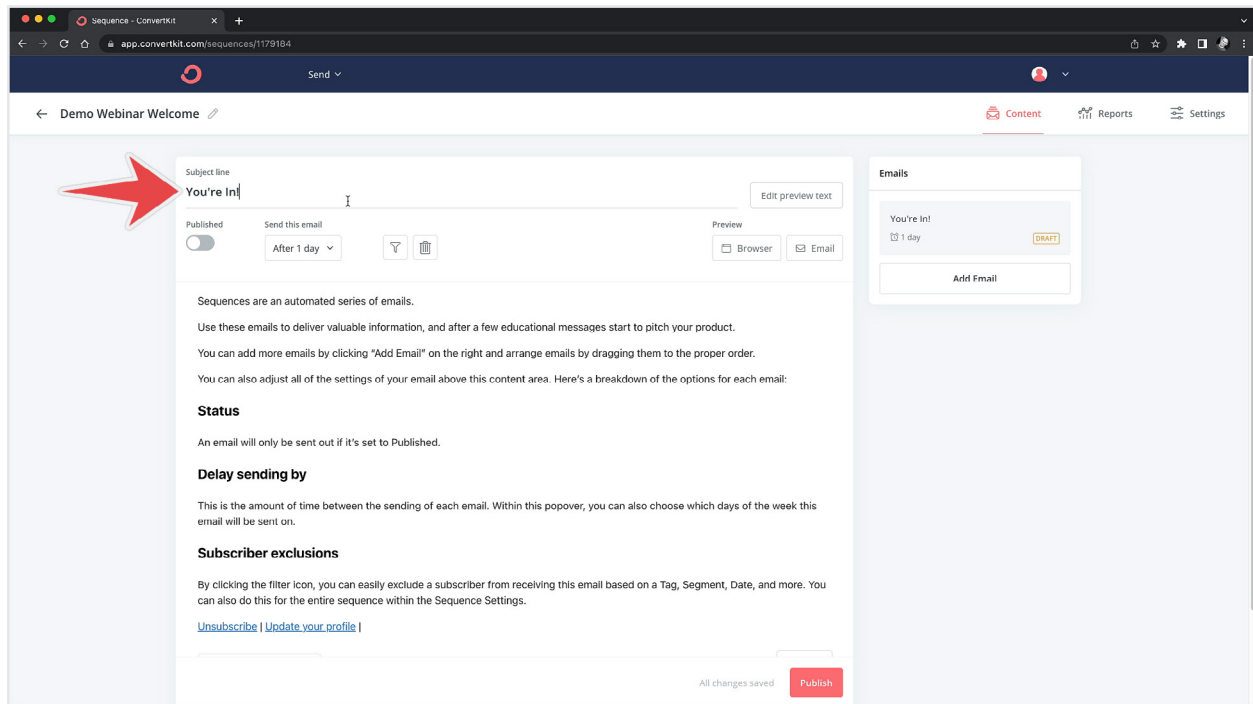
Select the template for your sequence:



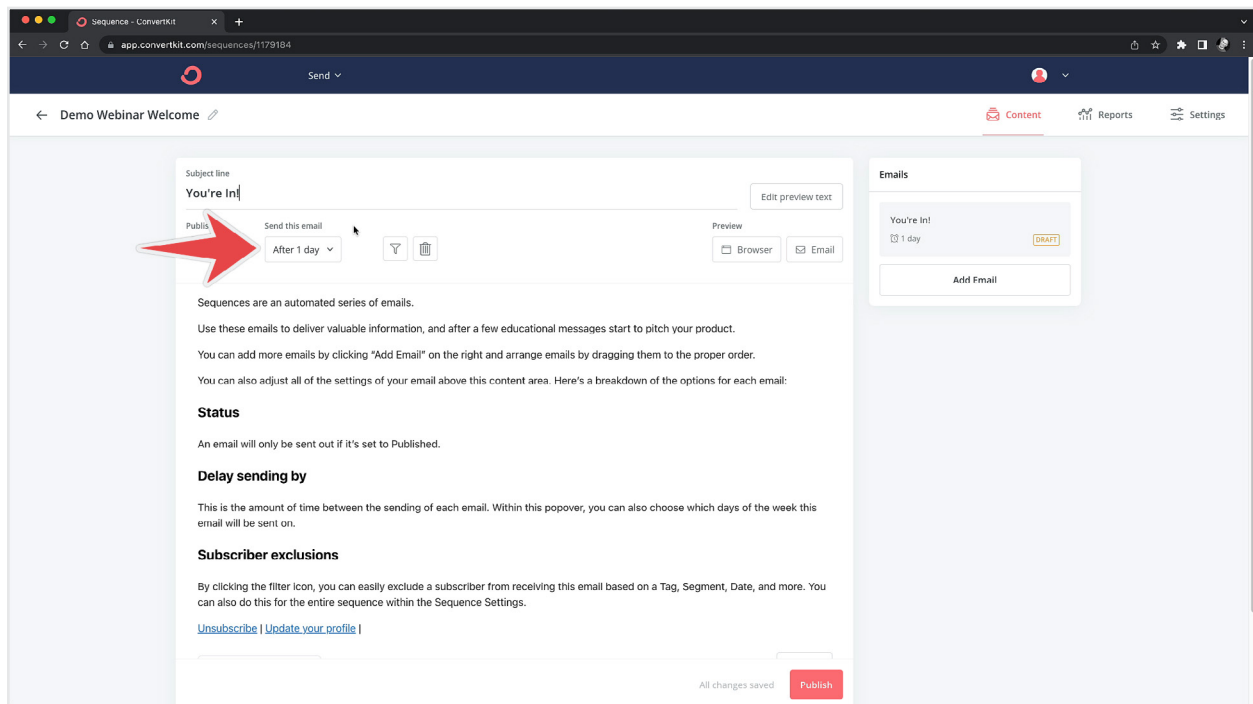
Then go to the upper left hand corner, click on the pencil and give your sequence a name that makes sense to you:



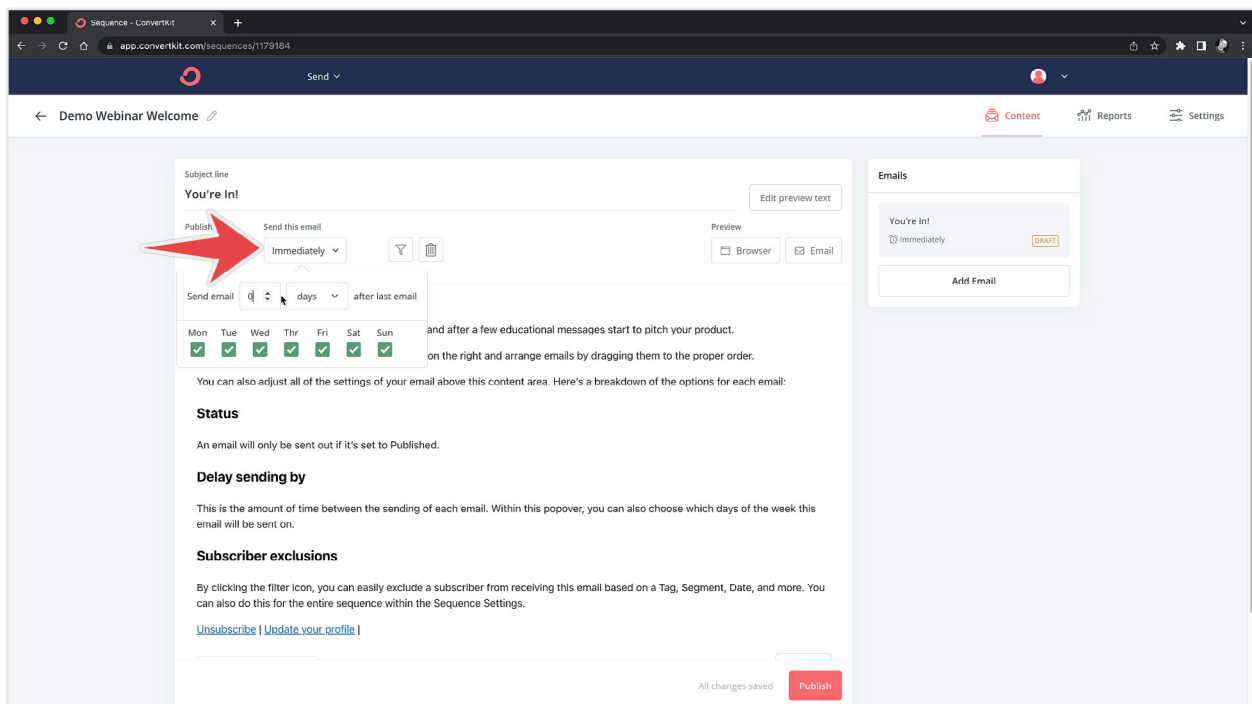
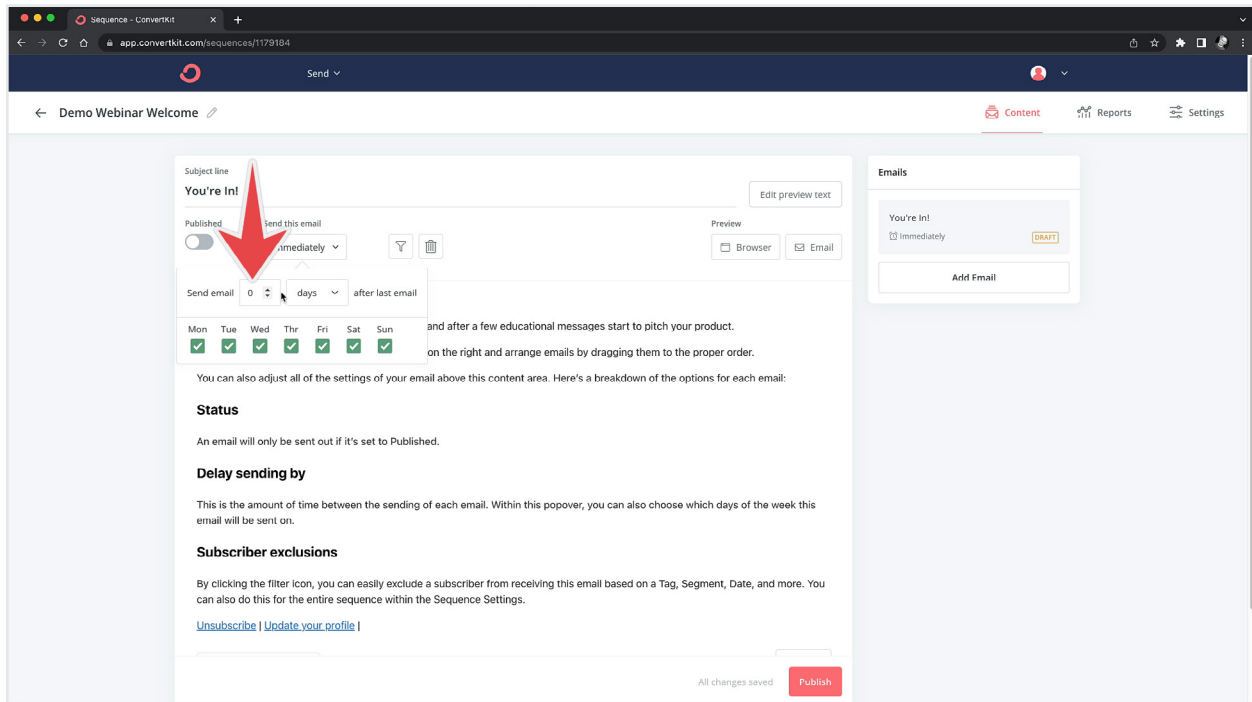
After that, write the **Subject** line for your welcome email:



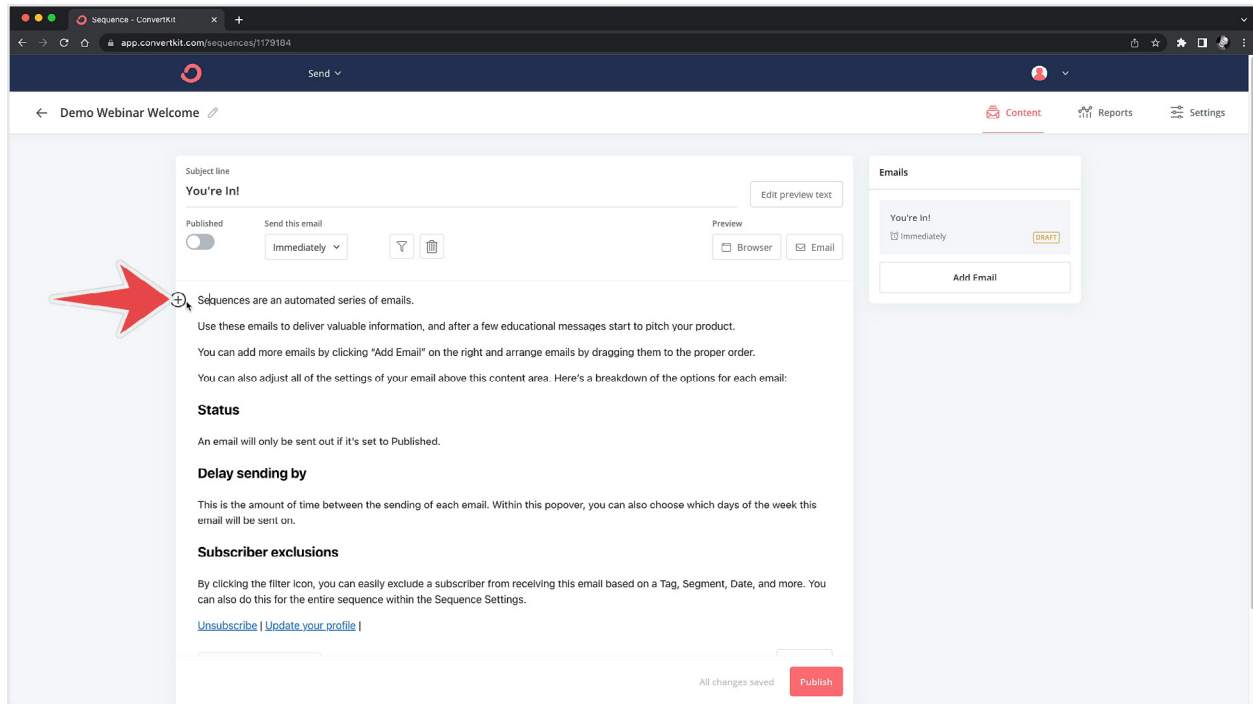
Next, go down to **Send this email** and click on this dropdown:



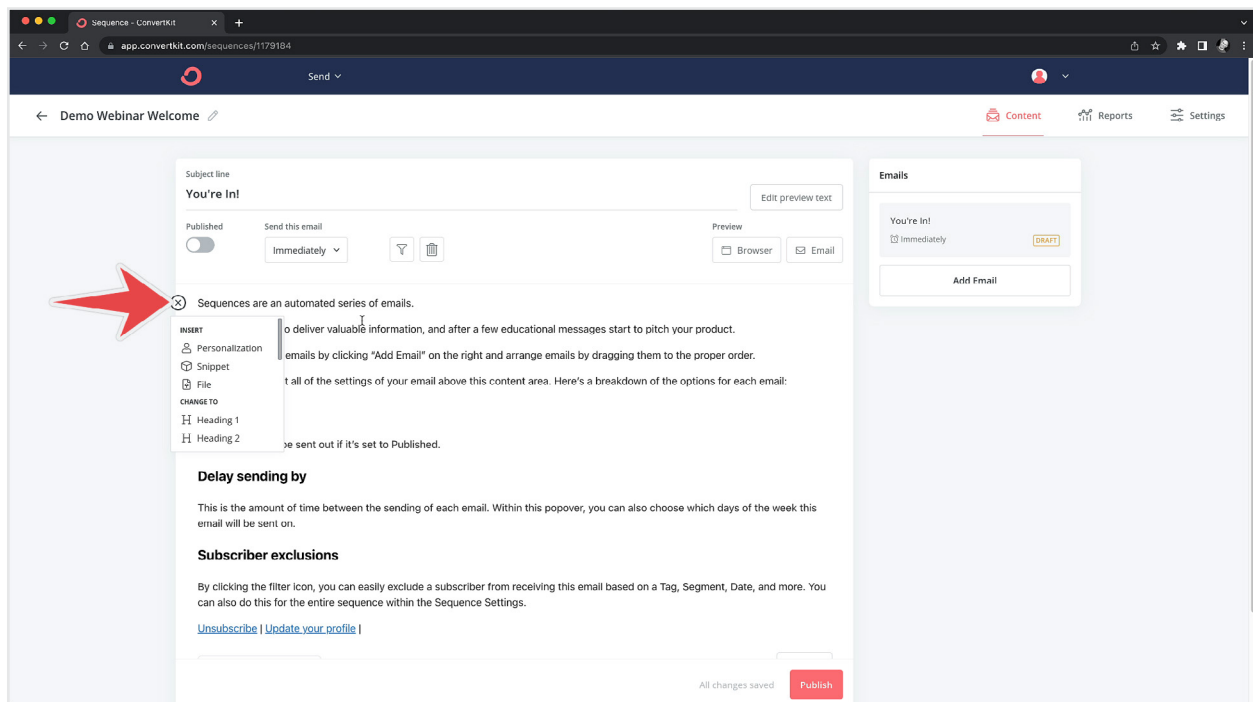
Change this number to 0. That means ConvertKit will send this email out immediately after someone registers for any of your webinars, which is what you want:



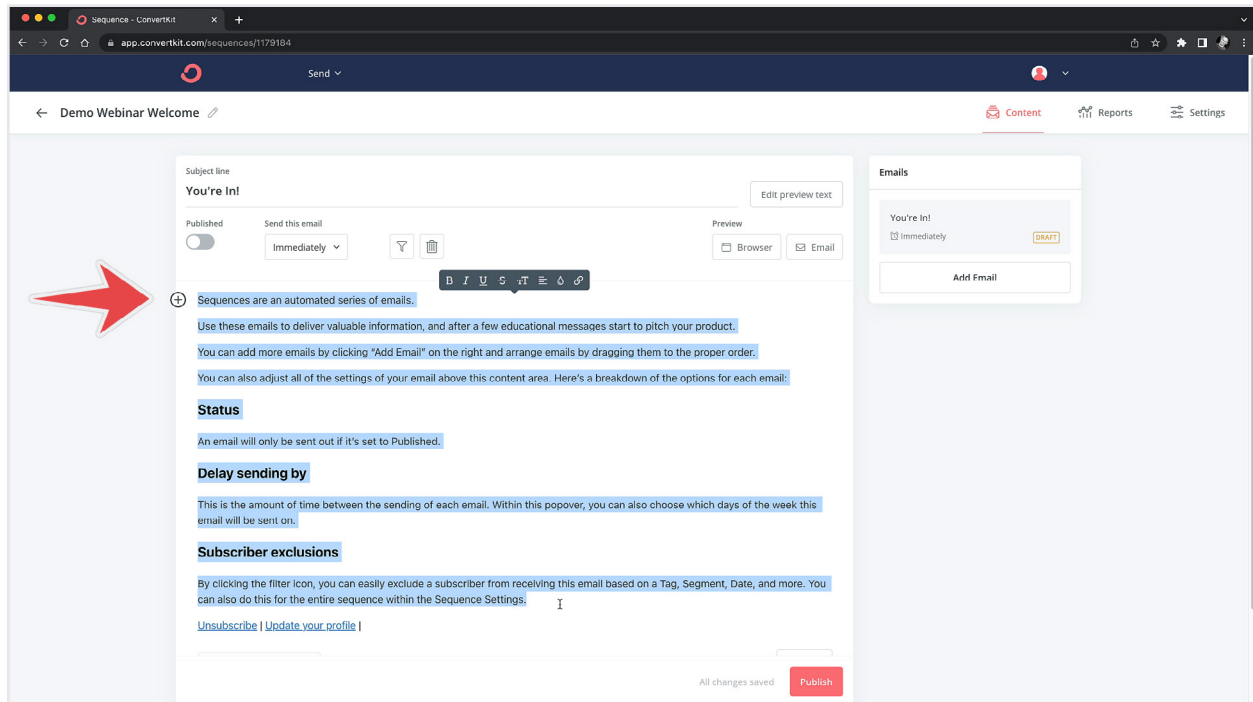
Now it's time to edit the content of your welcome email. And it can be a little confusing at first, because a **+ icon** appears next to each line in the email:



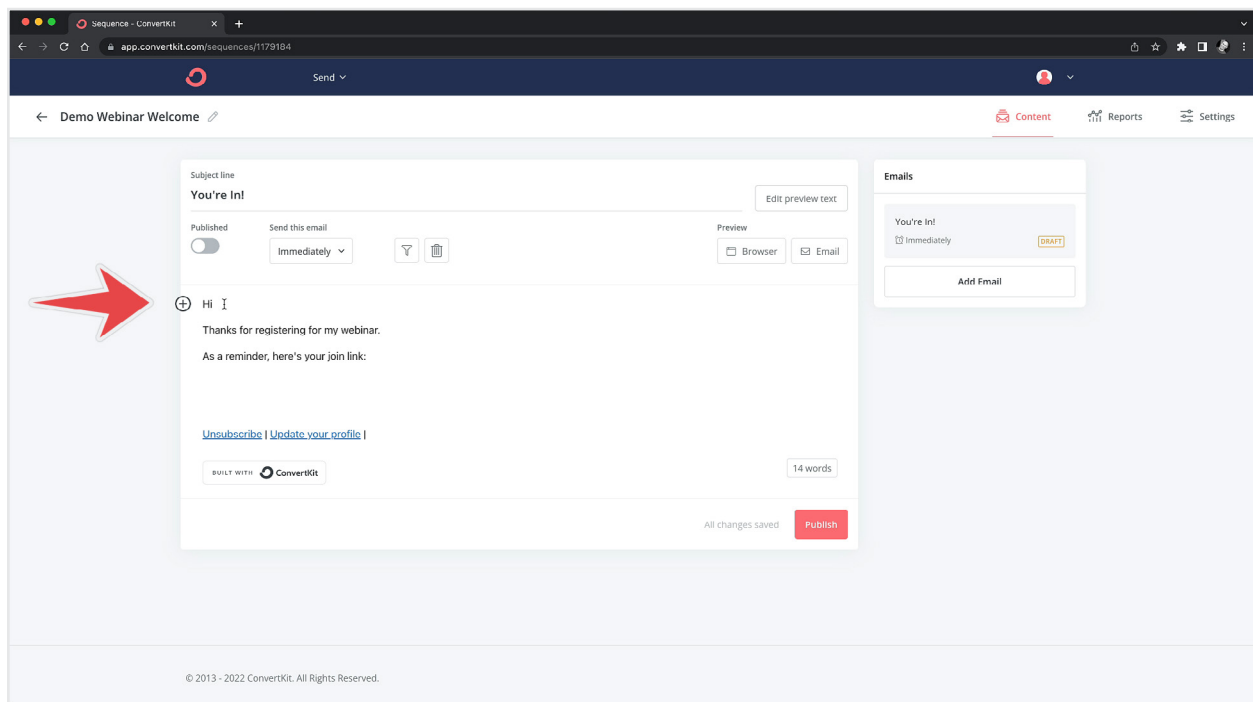
And when you click that **+ icon**, you'll see a dropdown with a variety of options:



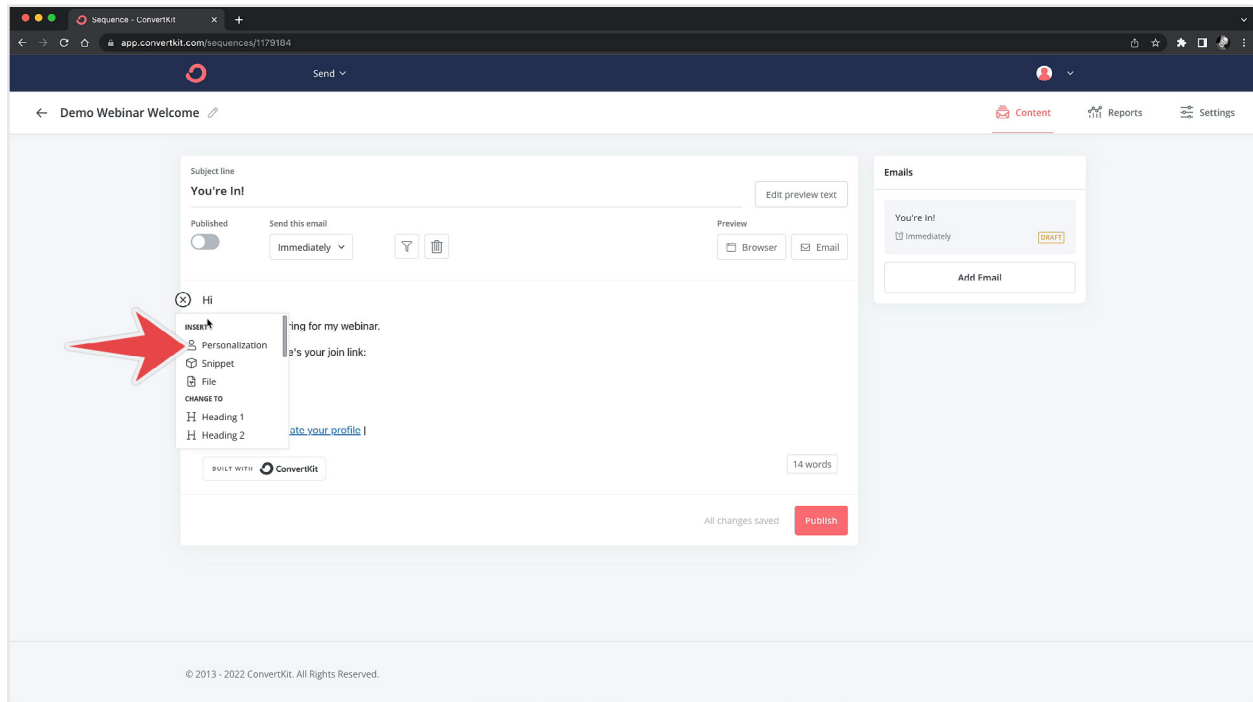
I'll demonstrate these options in a moment. But for right now, you need to delete all of the existing text (except for the **unsubscribe** link at the very bottom). So highlight all of the text and press the **Delete** key on your keyboard:



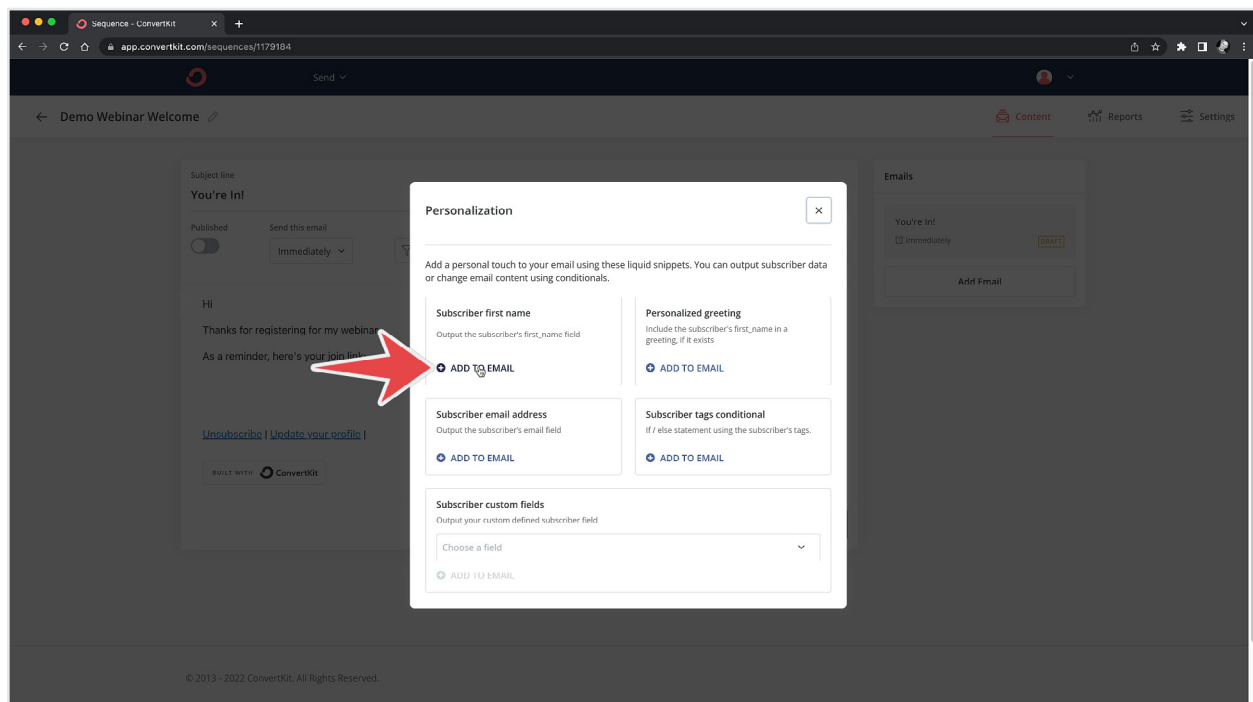
Then you can type in the content for your welcome email:



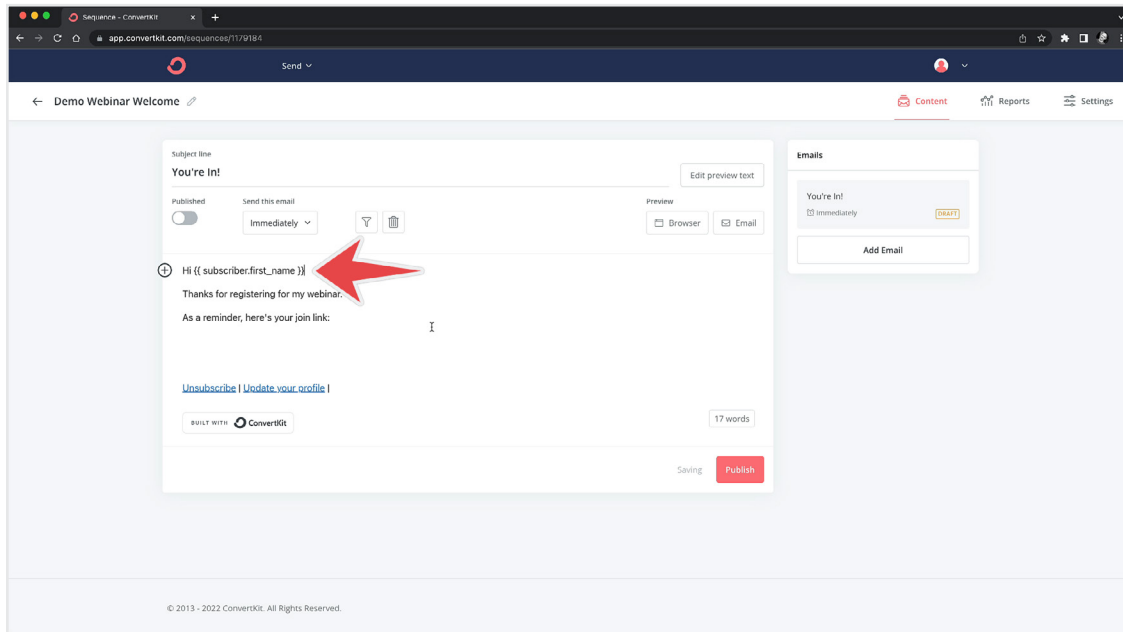
In this example, I start the email with “Hi”. And I’d like to add the recipient’s **first name** after that. This is where that **+ icon** comes into play. Click on the + icon and you’ll see a list of options. Choose **Personalization**:



Then for **Subscriber first name**, click on **ADD TO EMAIL**:

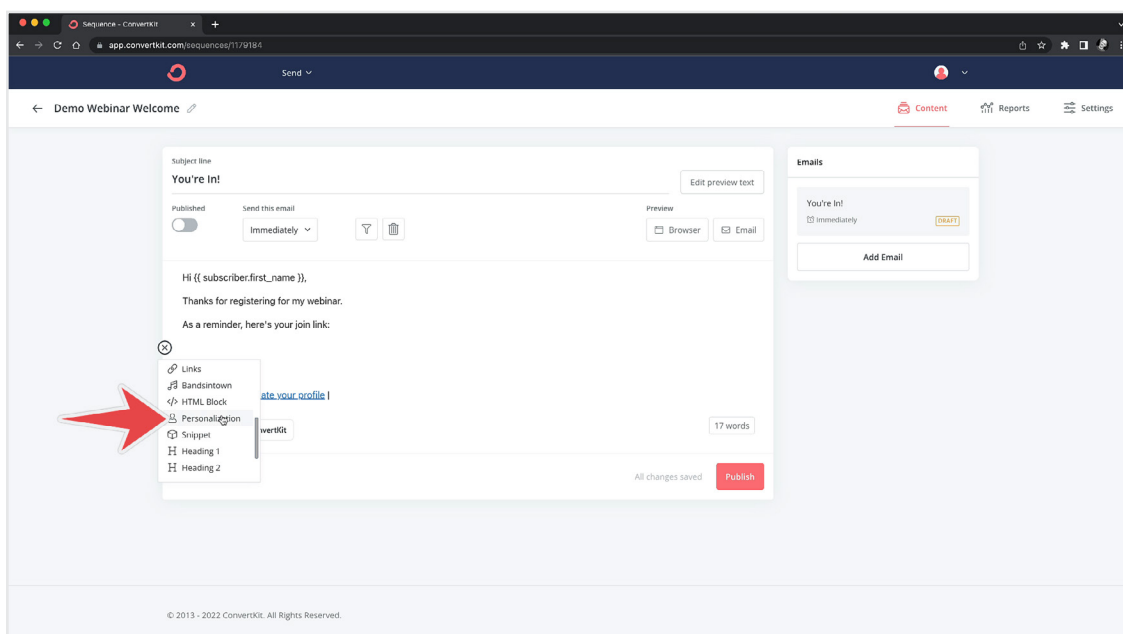


When you do that, you'll see some strange looking text added to the email. This is called a token or a placeholder. Although it looks strange, when the email is sent, ConvertKit will replace it with the first name of the email recipient:

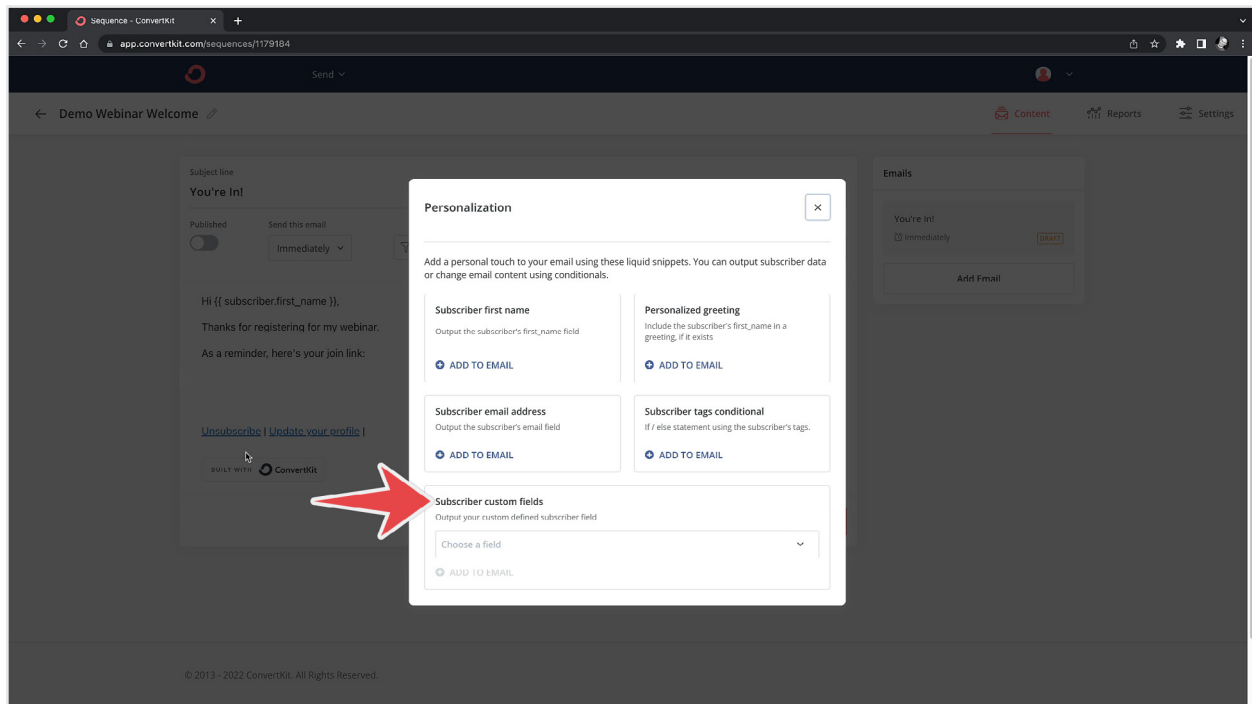


In this example, I'm also including the link where the person can join the webinar. Once again, you'll use **Personalization** for this.

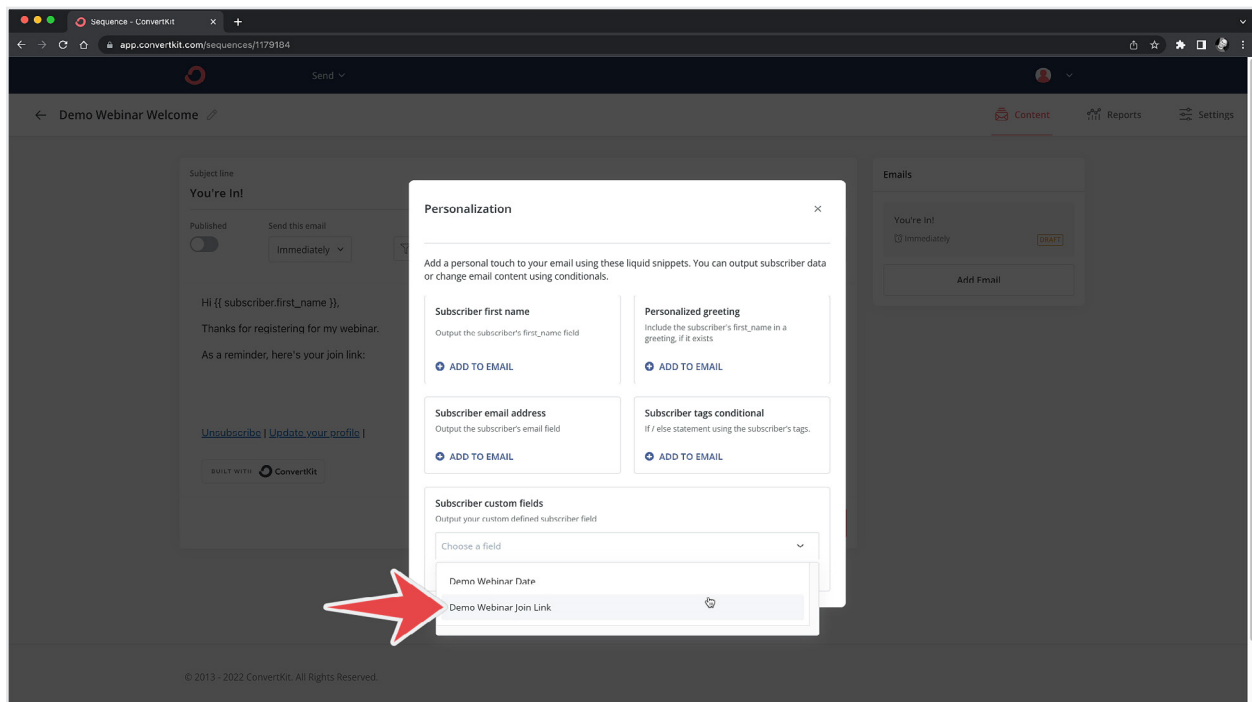
To do that, click on the **+** icon next to the link where you'd like the link added and select **Personalize**:

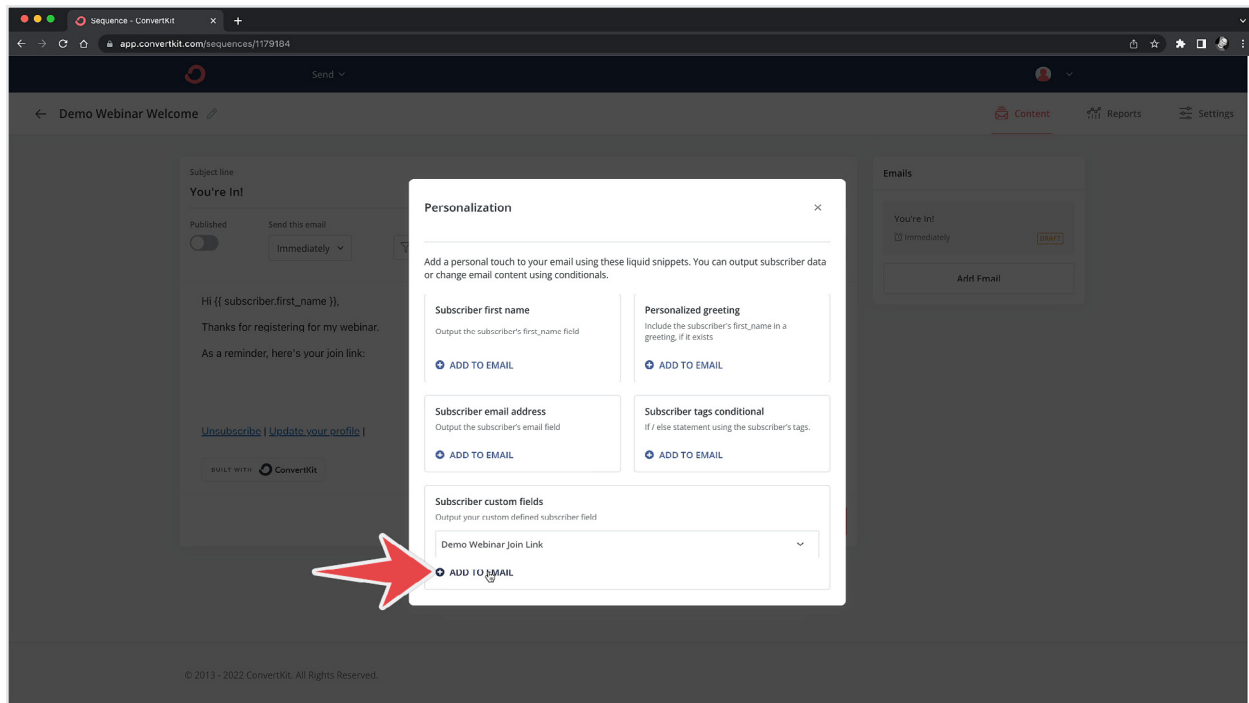


And when you do that, you're to see **Subscriber Custom Fields**. Click on it:

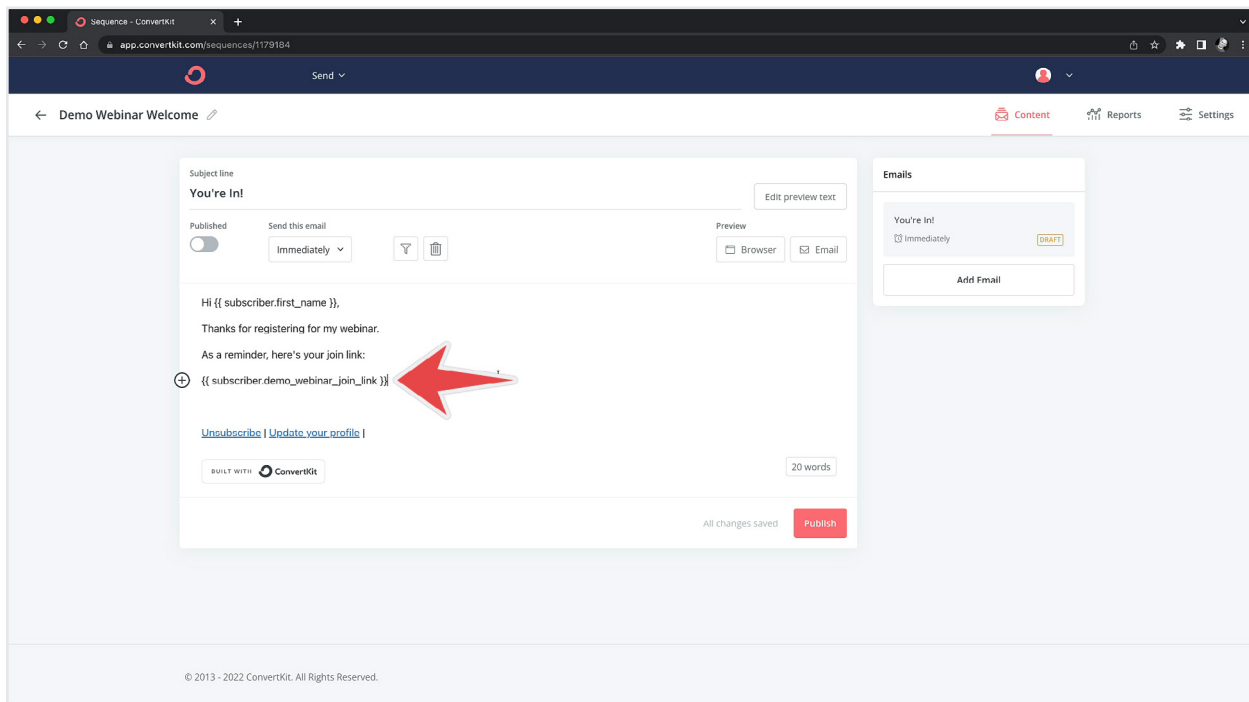


Select your **Webinar Join Link** and then click **ADD TO EMAIL**:

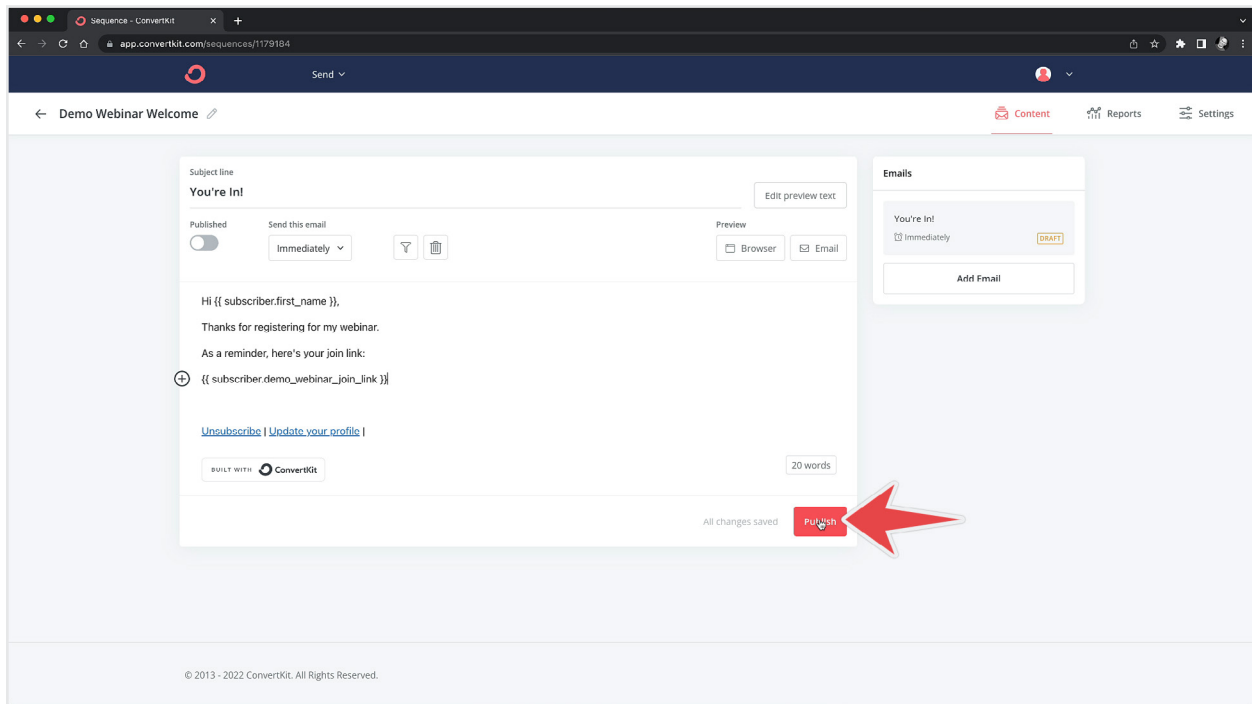




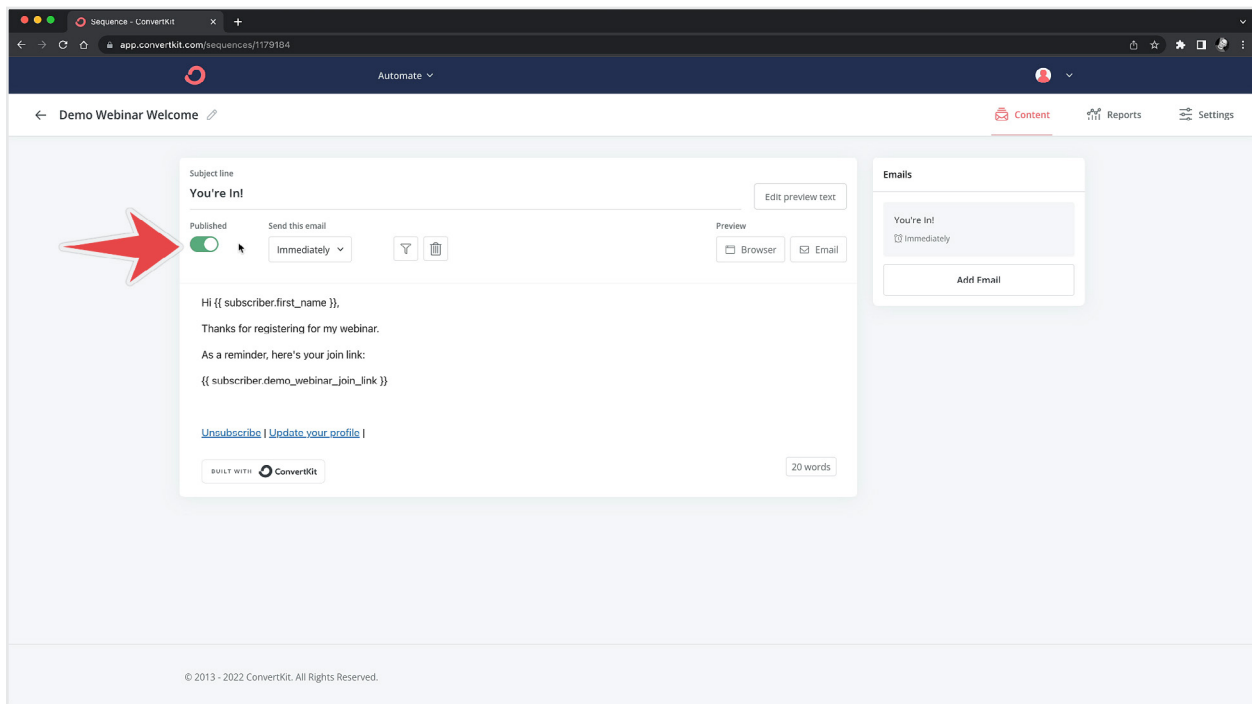
When you do that, you can see the **webinar join link** has been to the email:



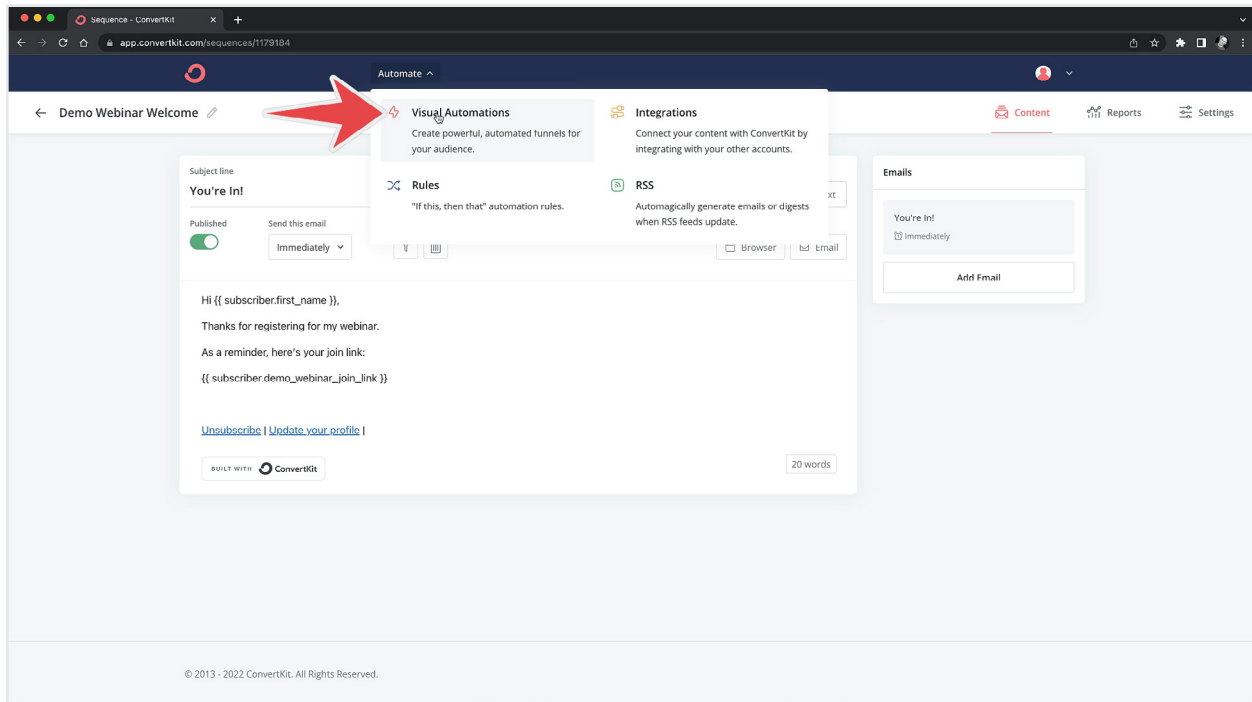
Then click on **Publish**:



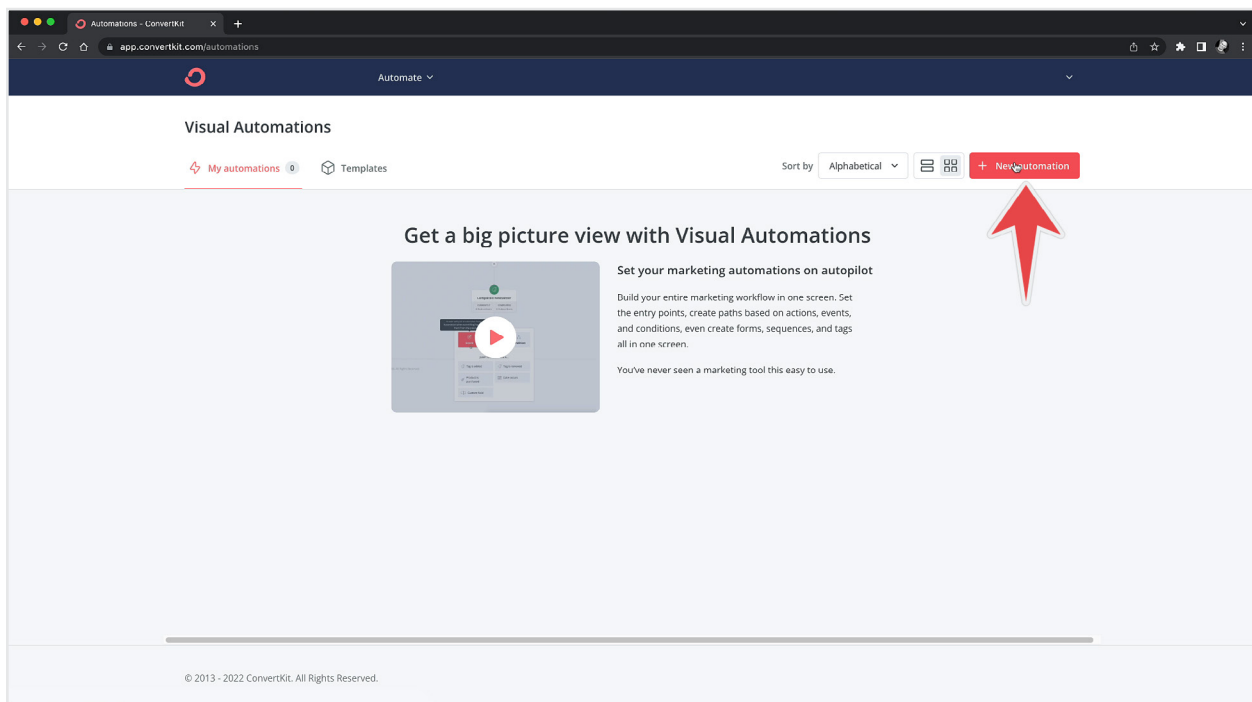
Now the email is published and ready to go:



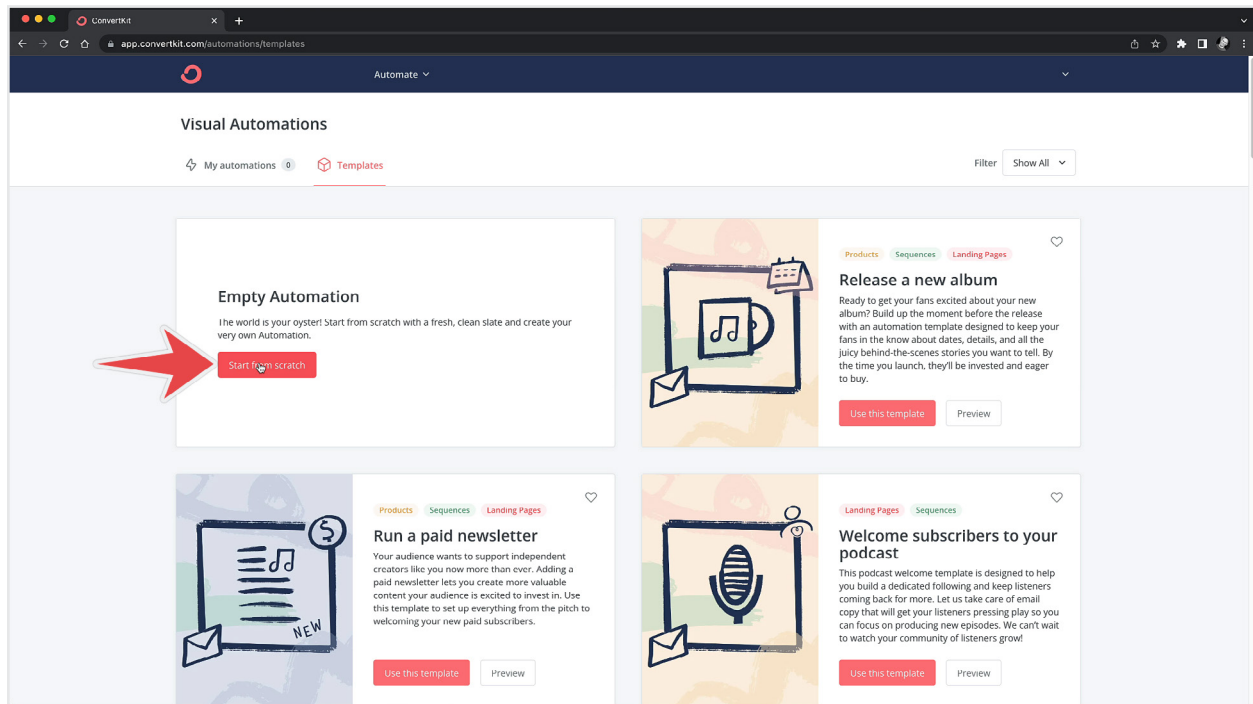
Now you need to tell ConvertKit when to specifically send the email. To do that, you're going to use **Automations**. So from the menu bar at the top, click on **Automate** and select **Visual Automations**:



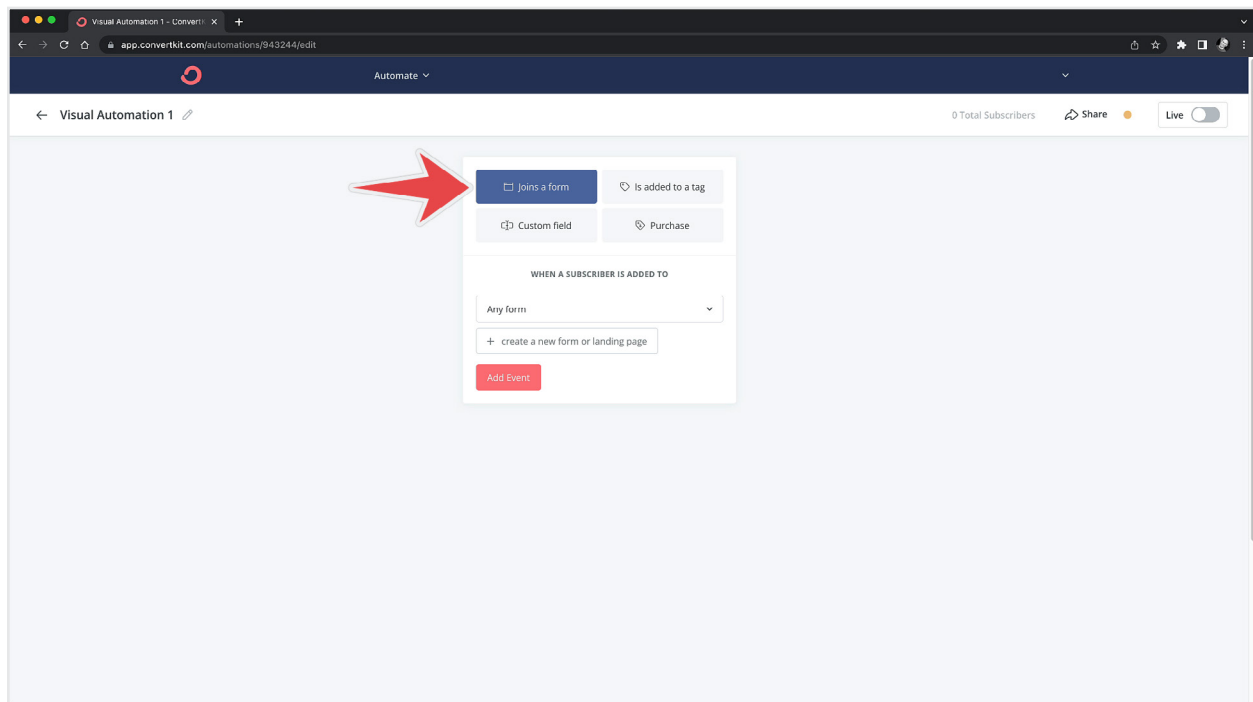
Then click **New Automation**:



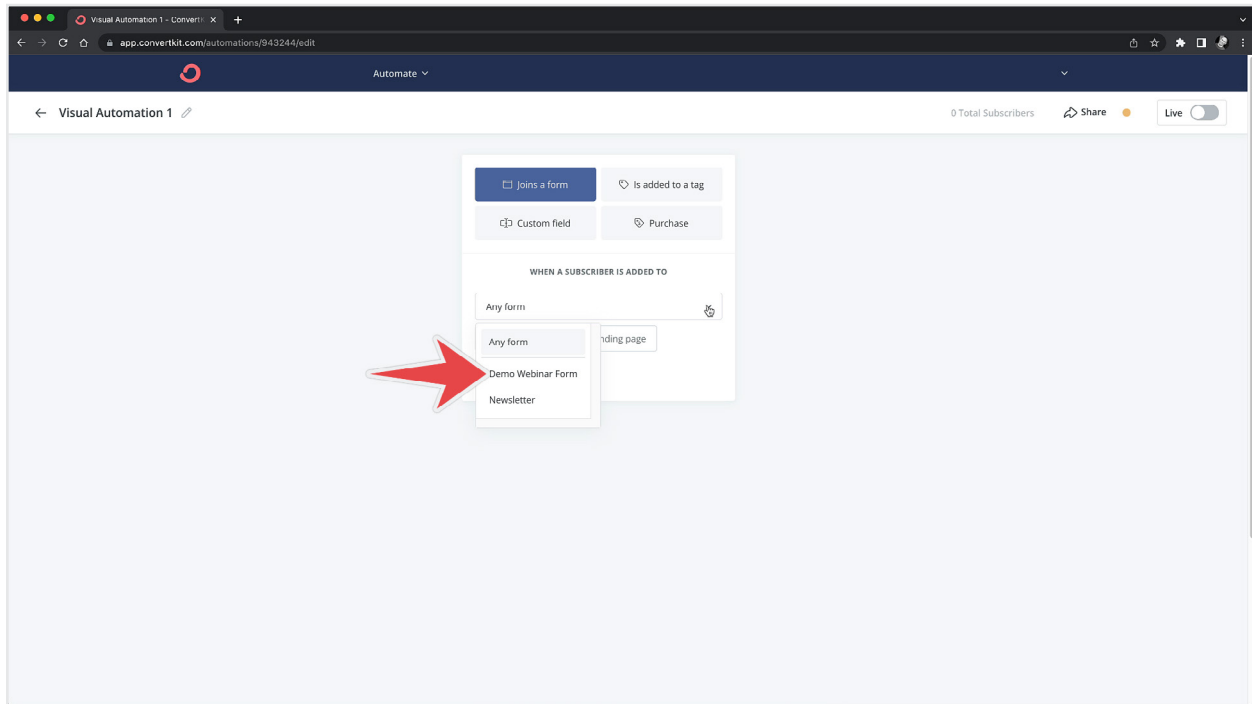
Under **Empty Automation**, click **Start from scratch**:



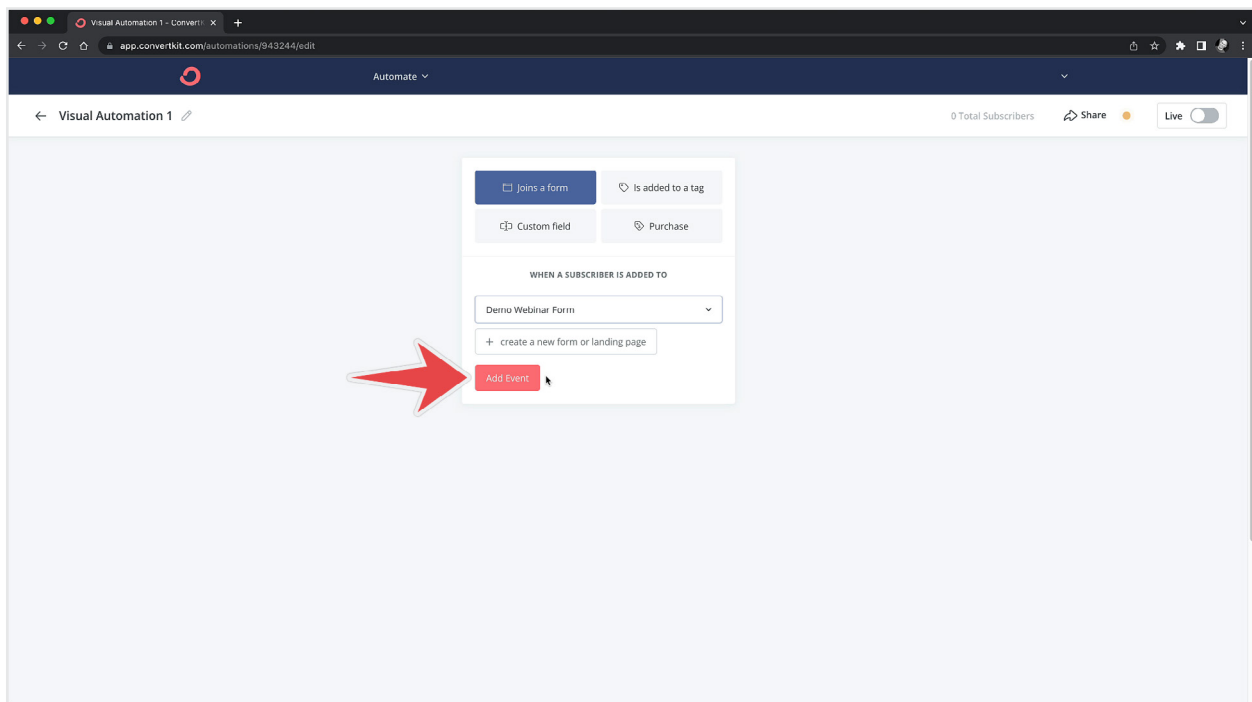
For the **Trigger**, make sure **Joins a form** is selected:



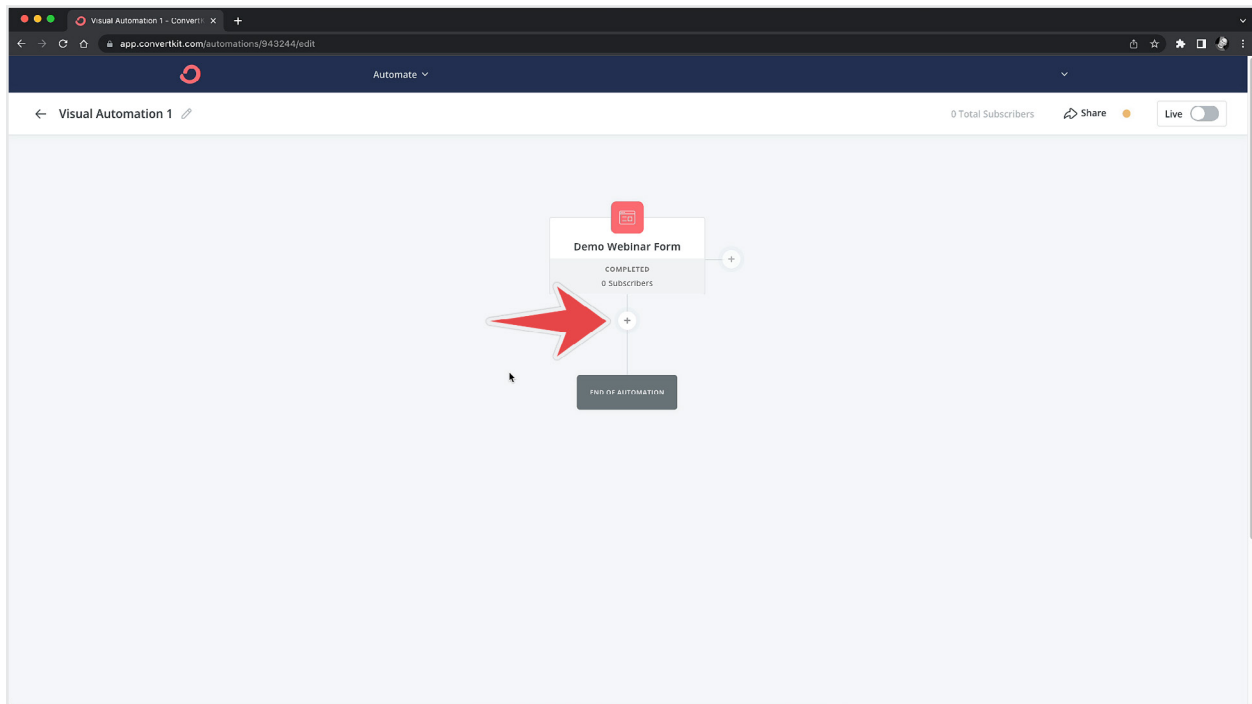
Click on the dropdown. You want to select the form that you created earlier in **Step 2**:



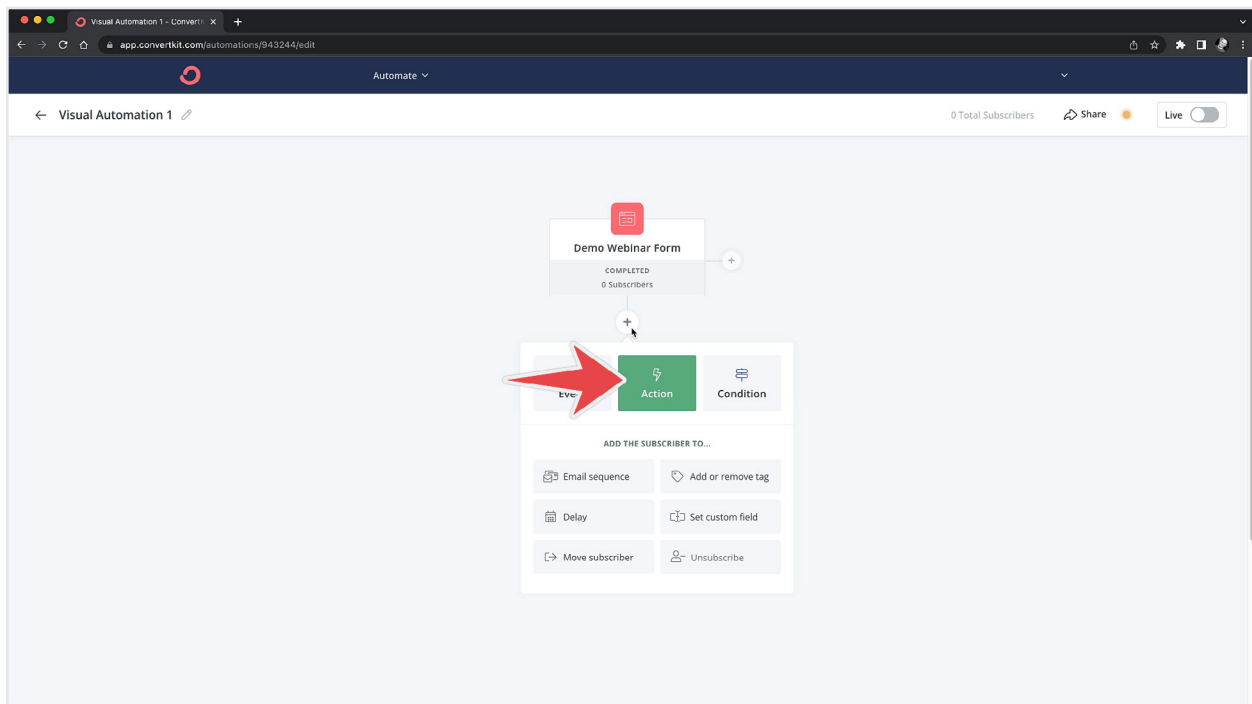
Then click on **Add Event**:



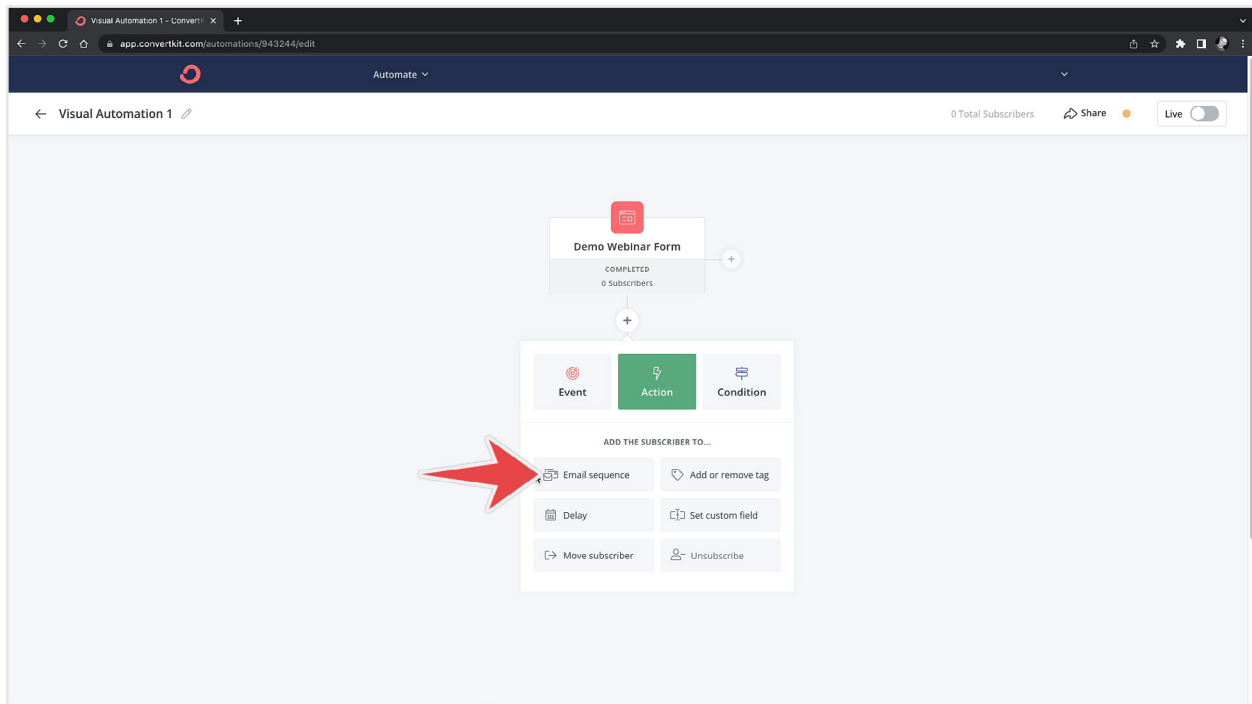
After that, click on the little **plus** button icon:



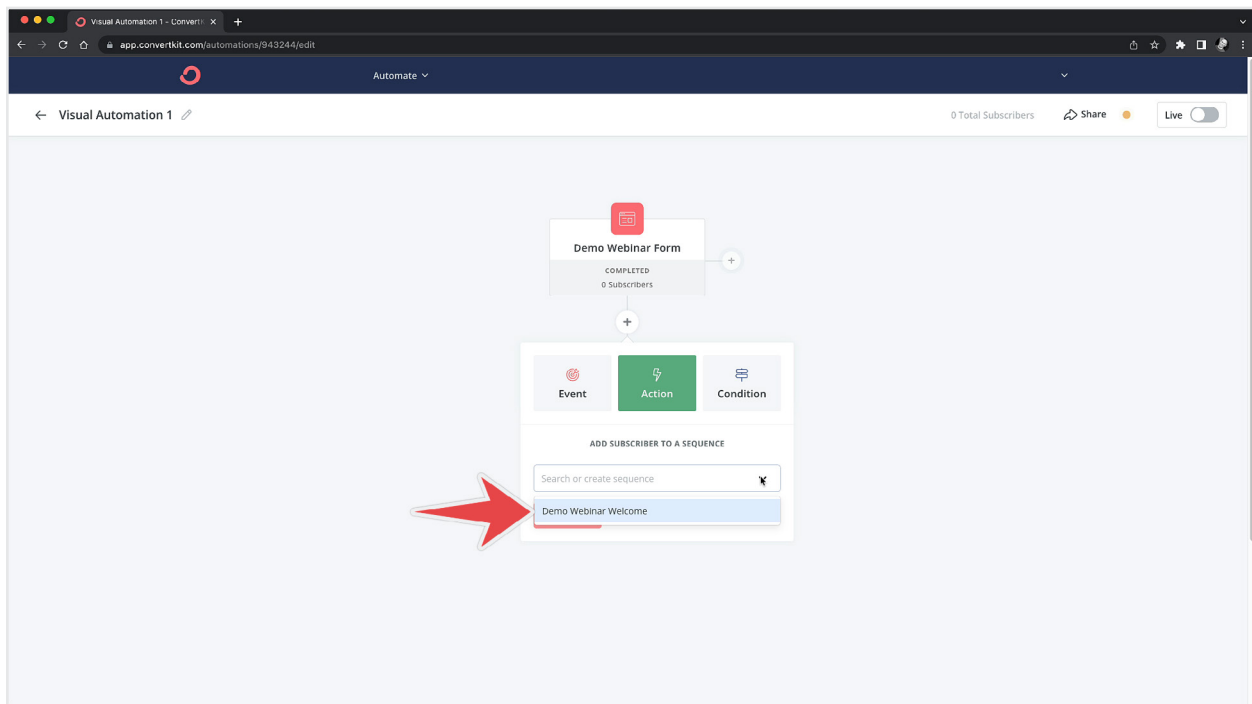
Make sure that **Action** is selected:



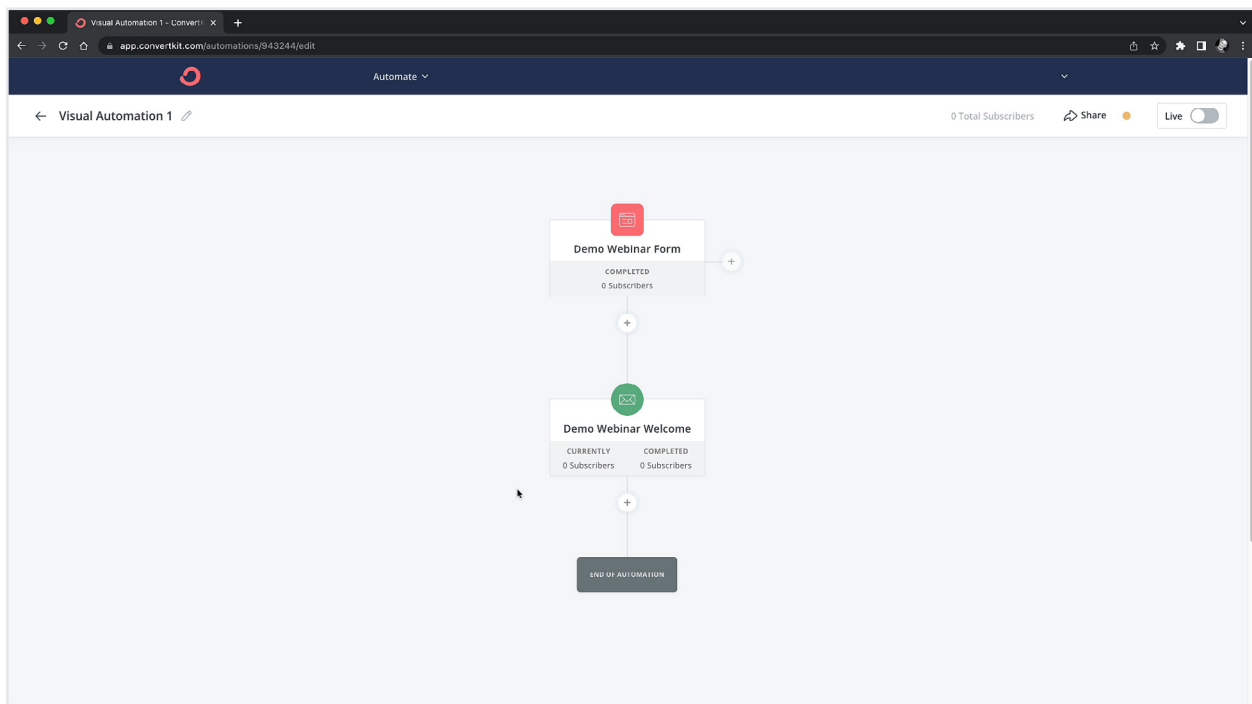
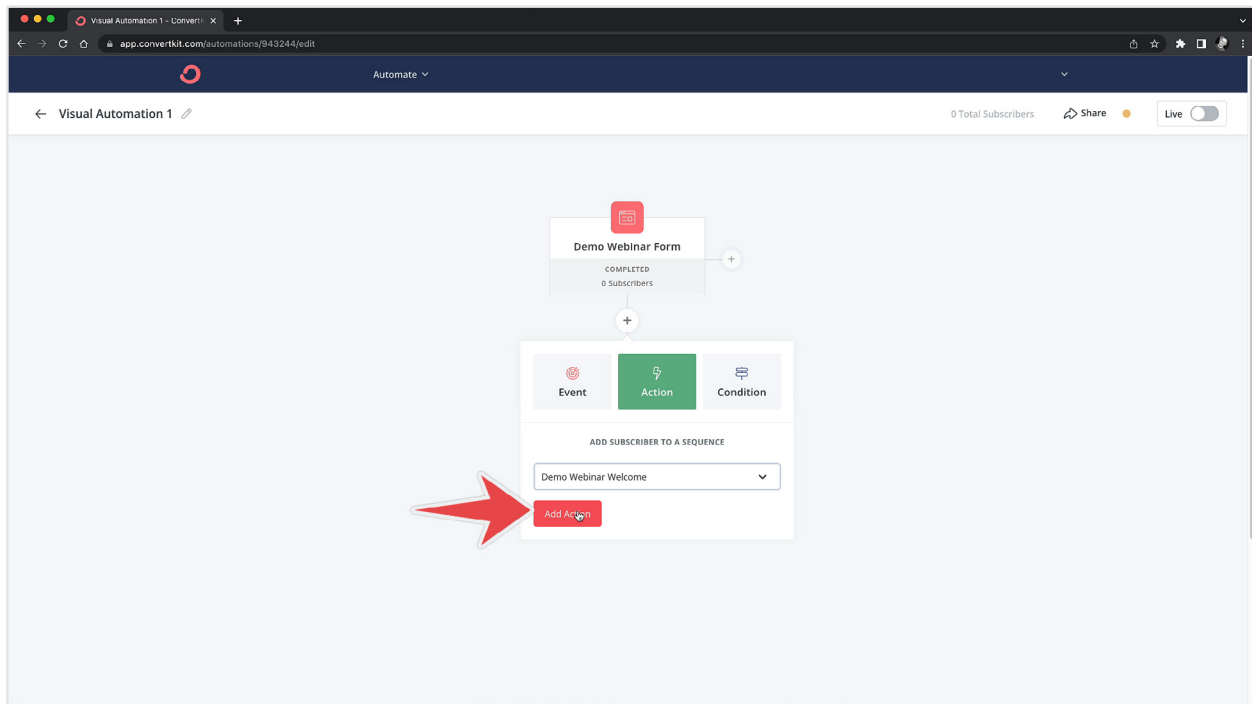
Then select **Email sequence**:



Click on the dialog and select the email sequence you just created:

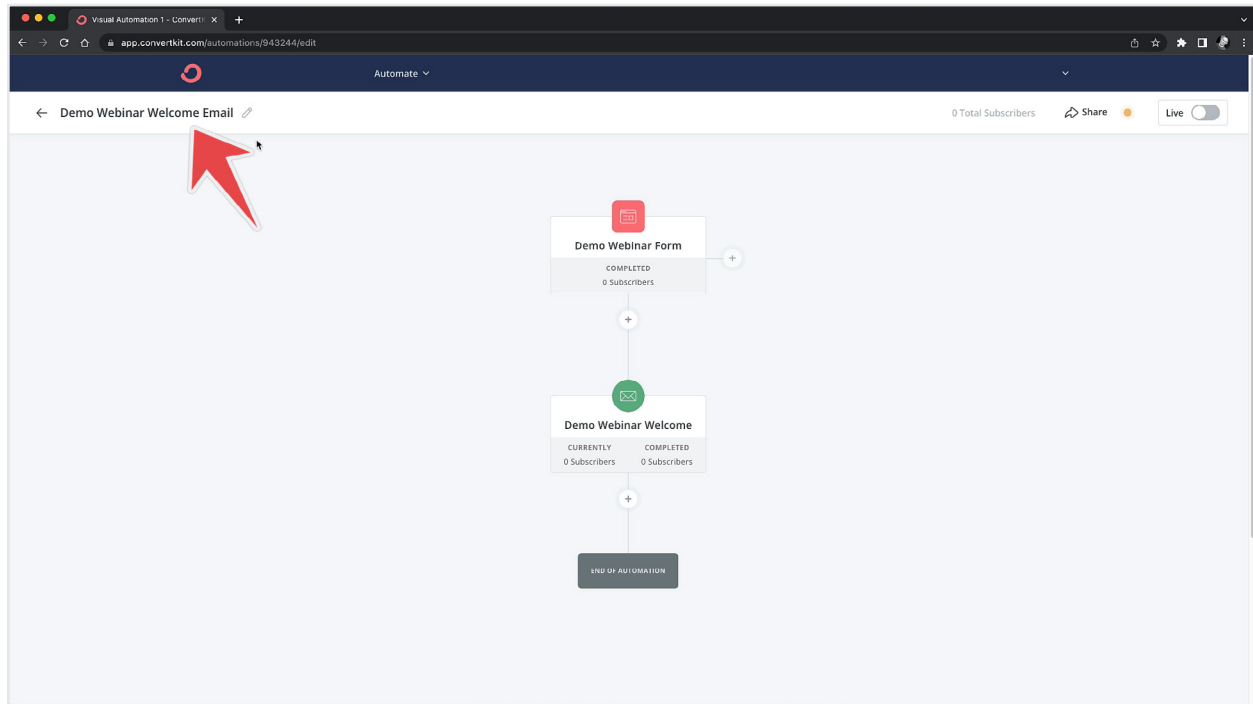


Then click on **Add Action:**

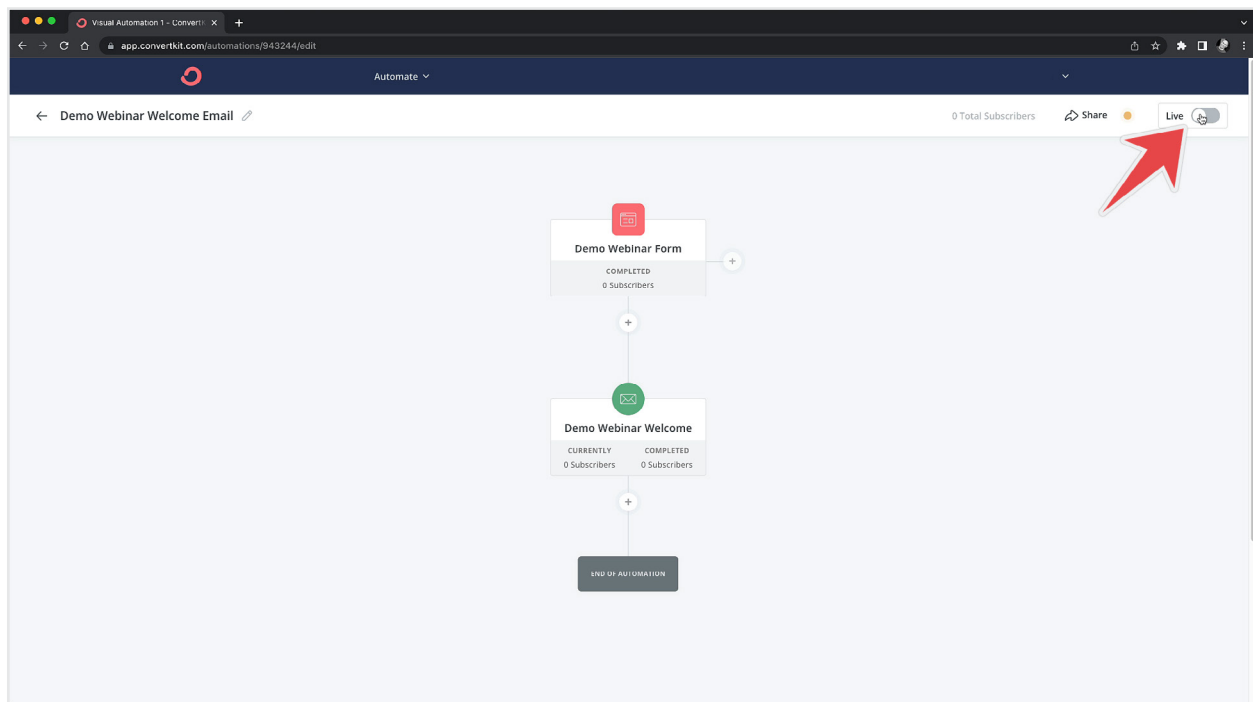


So with this automation, what's happening is that when someone goes to your page on Kajabi and registers for your webinar, ConvertKit will know (through Demio and Zapier) and will automatically send out your welcome email.

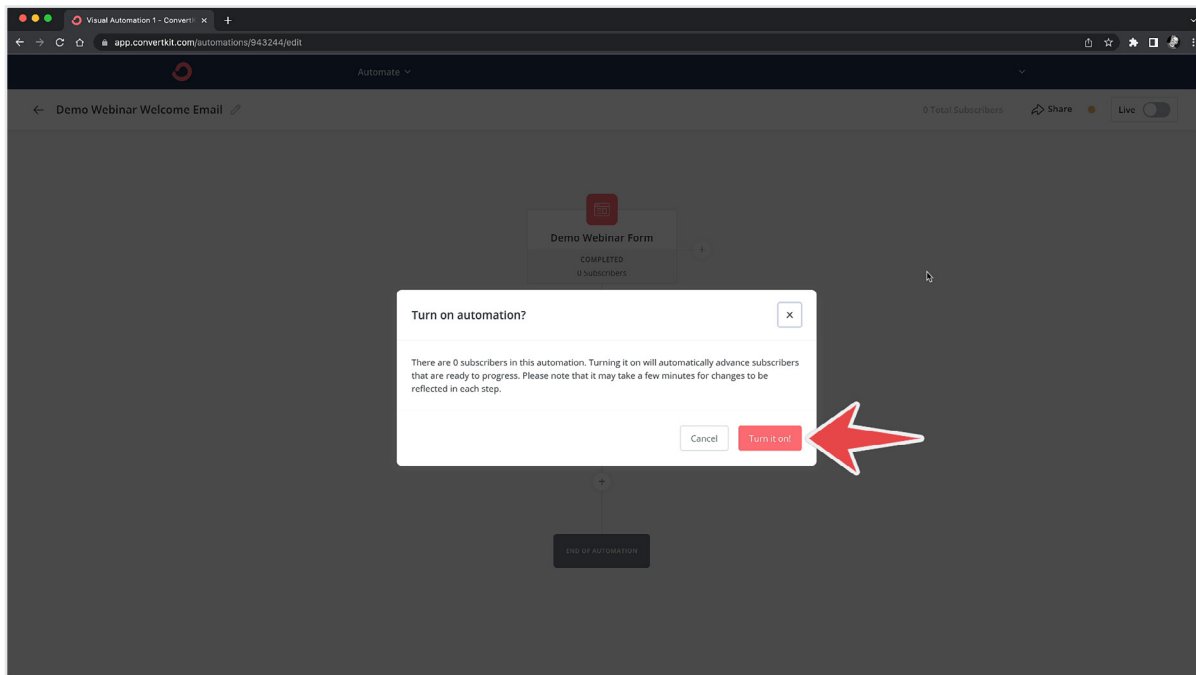
Nex, in the upper left corner, click on the pencil and name this automation. For example, I've named mine Demo Webinar Welcome Email:



Then go to the upper right hand corner and turn it on:

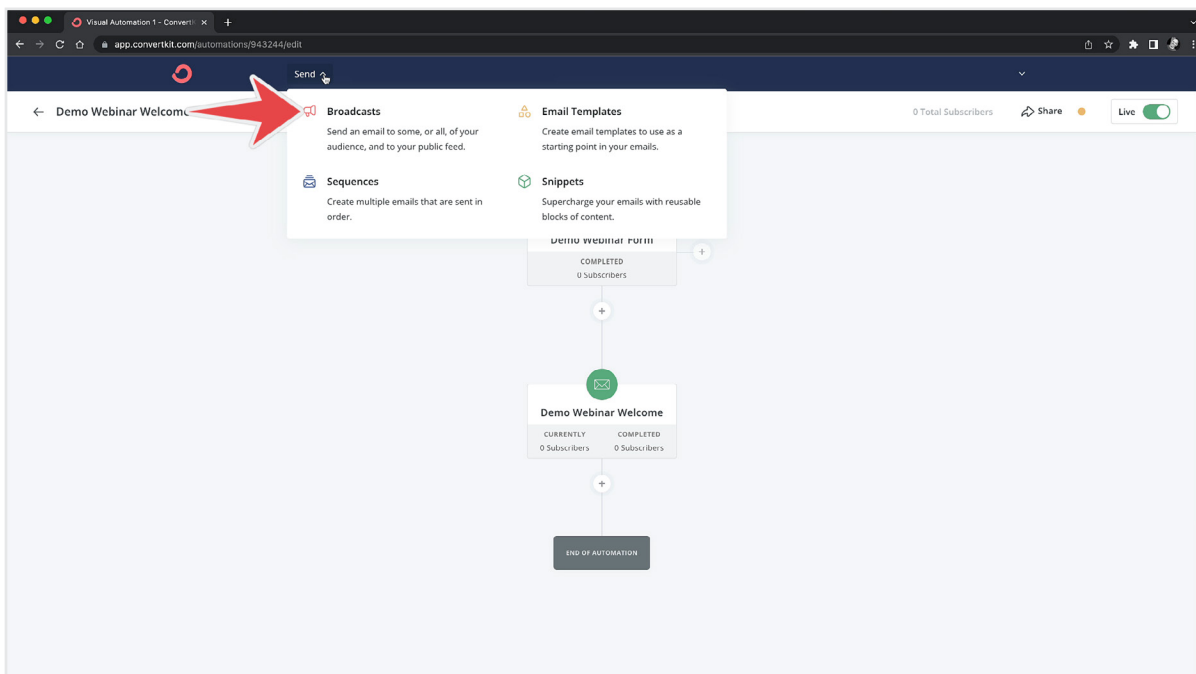


And then confirm that you want to turn it on:

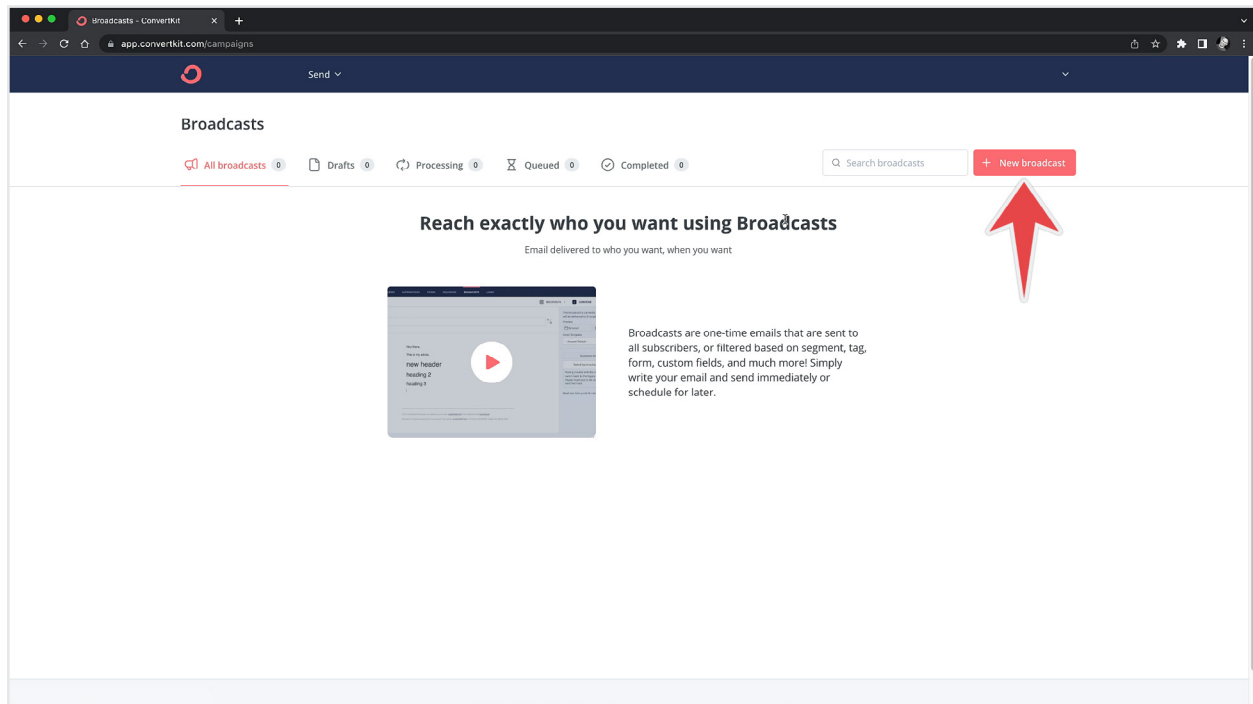


And that's it, you're done! Your automated sequence and webinar welcome email are live and ready to go!

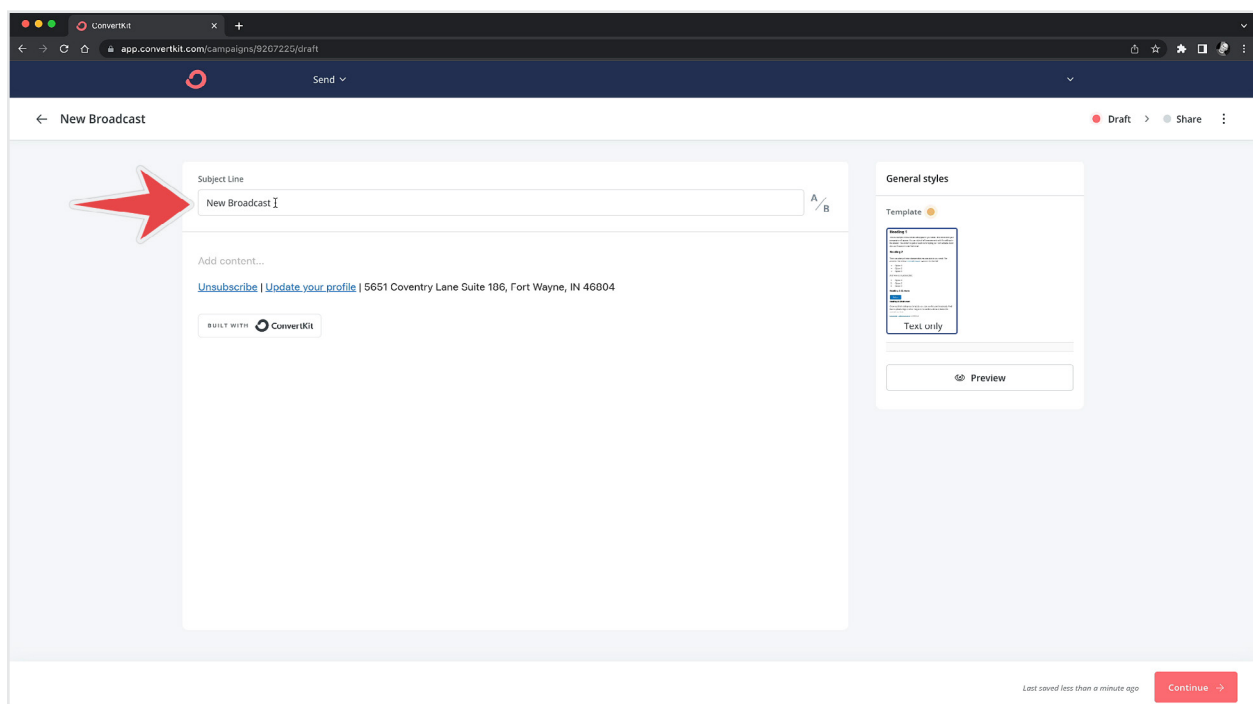
Next, you'll work on **Broadcasts**, which you'll be using for all of the other emails that you send out. Go up to the menu bar at the top, click on **Send**, then go down and select **Broadcasts**:



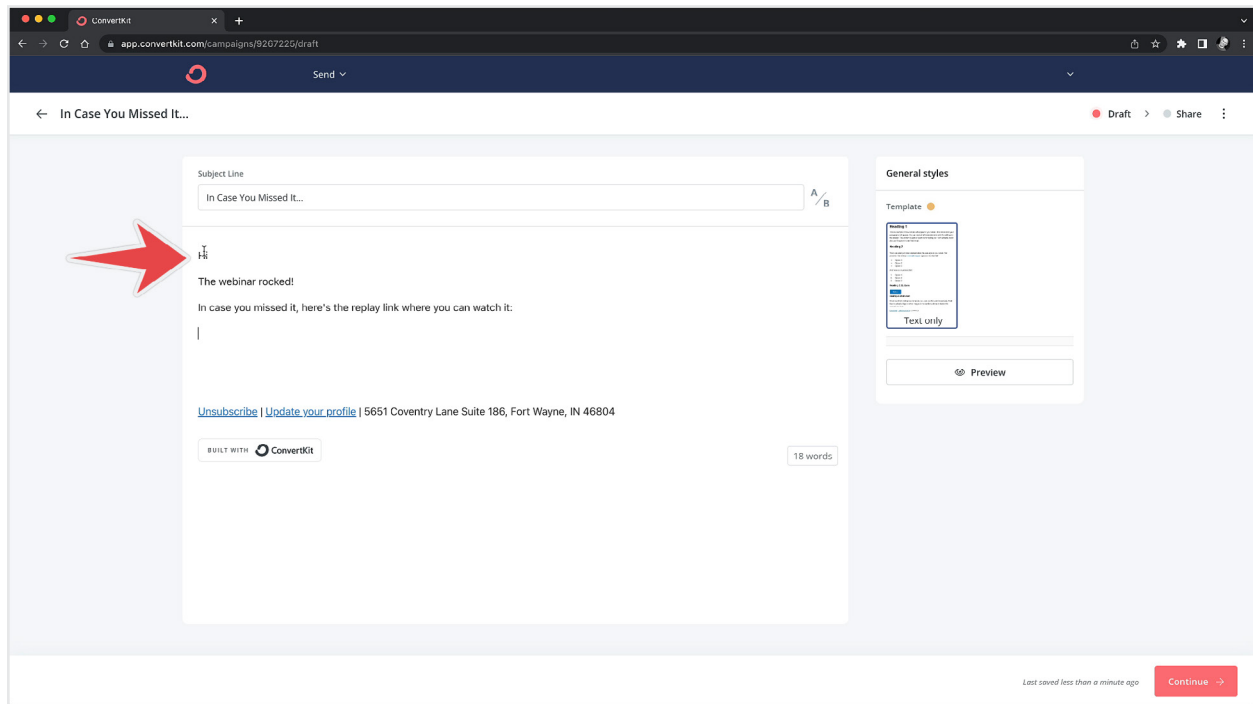
Select **New Broadcast**:



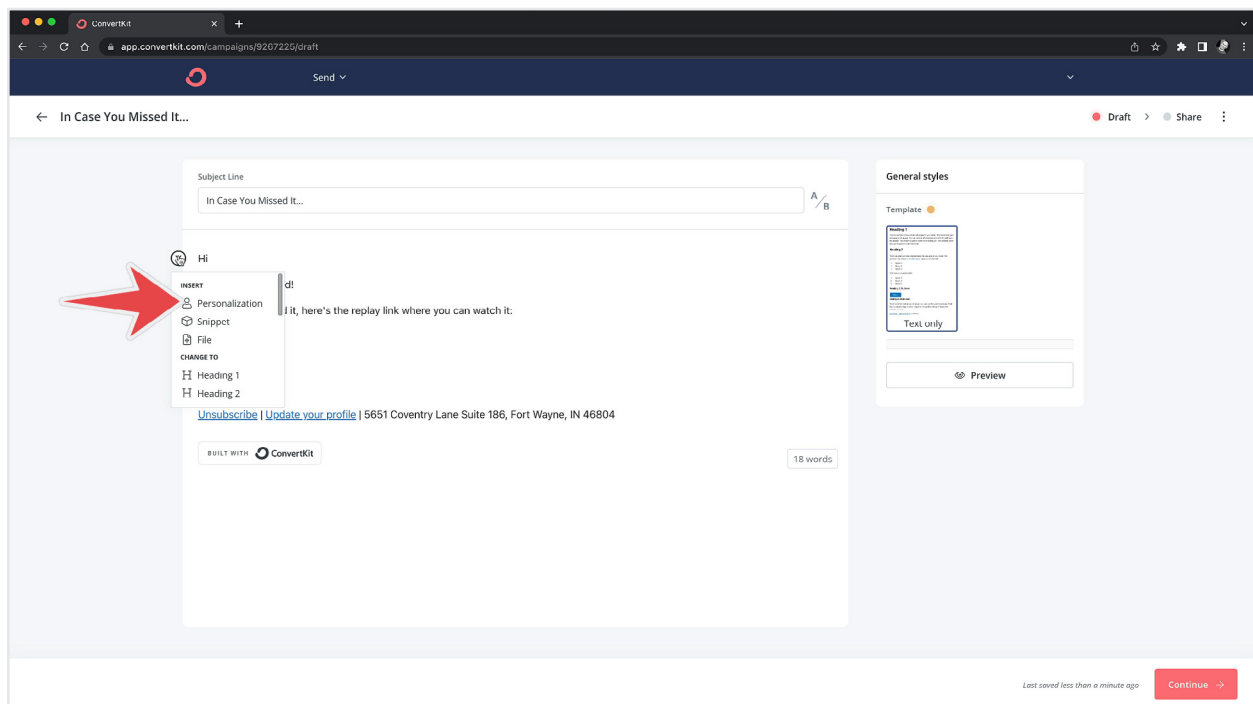
I'm going to show you how to create one broadcast and then you can repeat the same process over and over for all of your broadcast emails. And the example broadcast I'll be creating will be for my **webinar replay email**. So first, enter a subject line for the email:



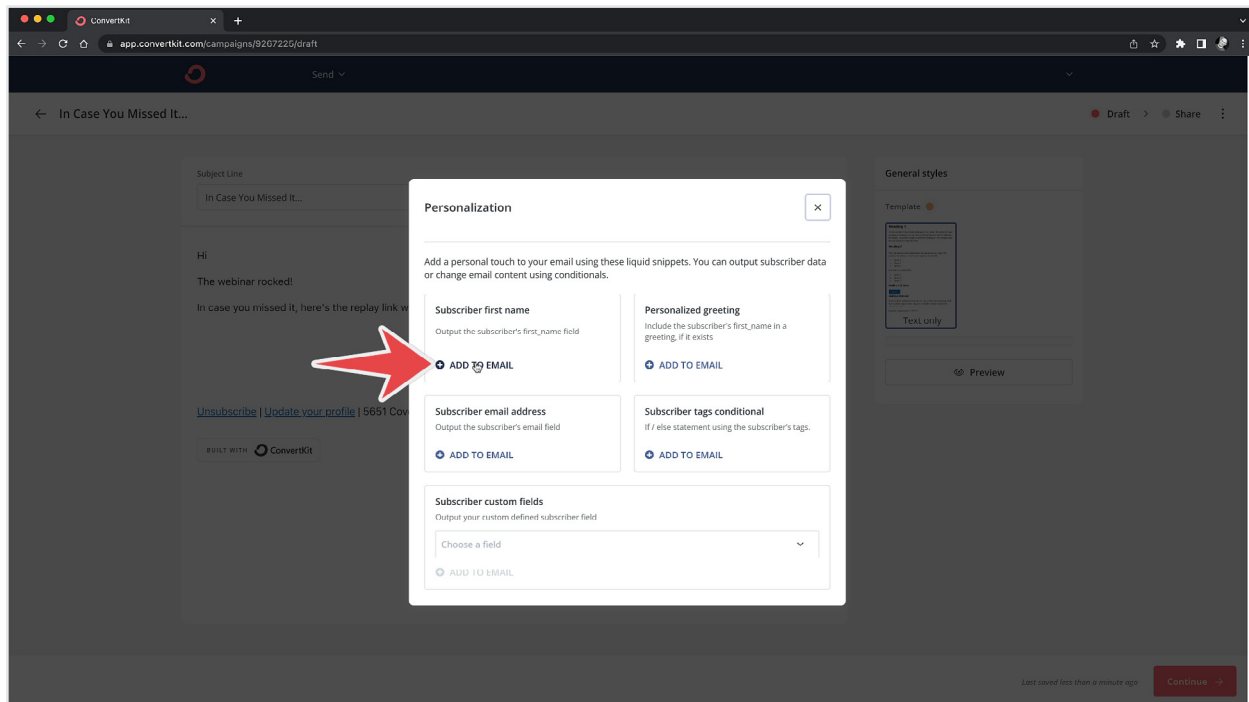
Then go down and add your content just like you did for your welcome email:



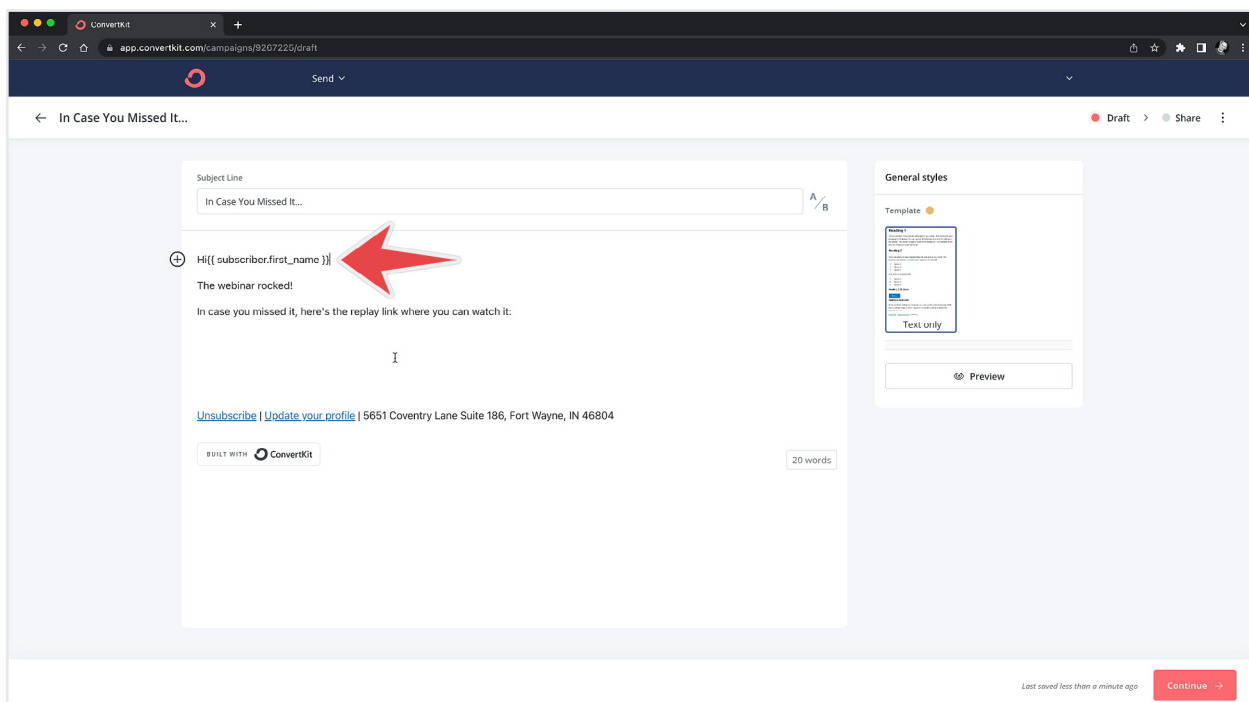
Next, you can optionally personalize the email. In this example, I'll add the person's first name to the email. To do that, click on the **+** icon and then select **Personalization**:



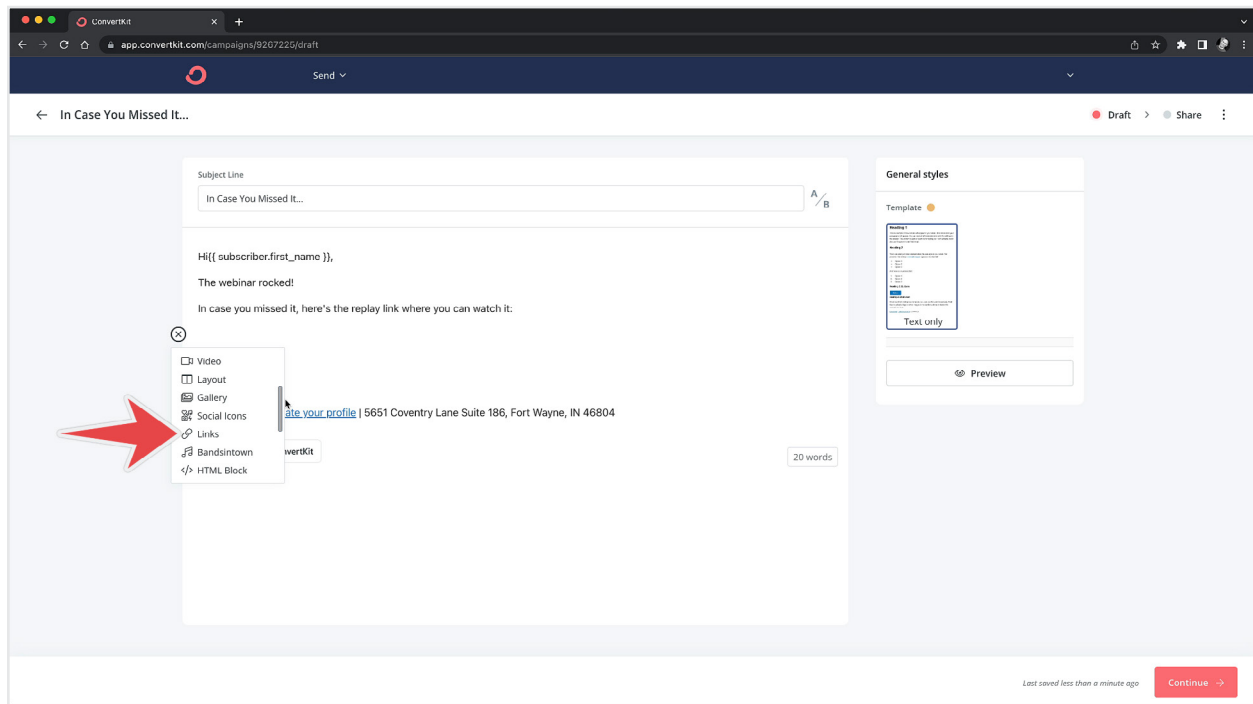
Select **Subscriber first name** and then select **ADD TO EMAIL**:



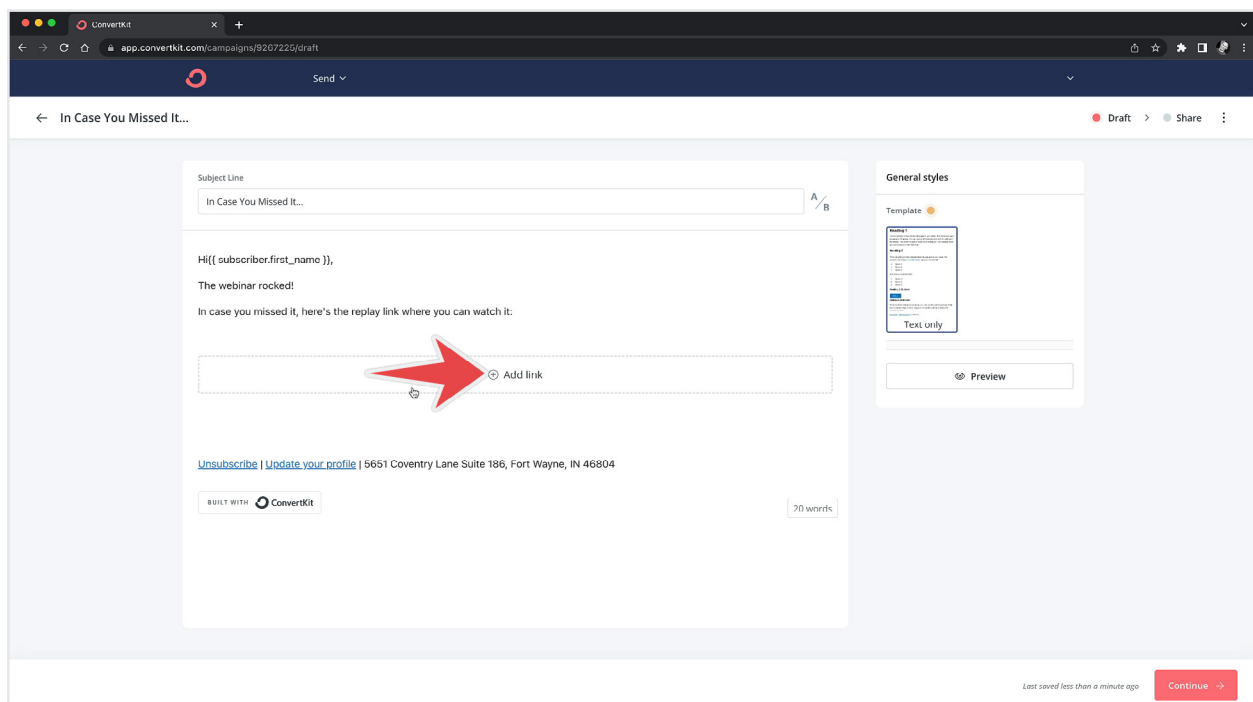
ConvertKit will replace the strange looking code with the recipient's first name when it sends the email out:



In this email, I'm also including a link to a webinar replay page. To include a link in your email, click on the **+ icon** and select **Links**:



Then click on **Add link**:



Enter your link URL (in this example it's the link to my webinar replay page in Kajabi) and then click on **Add link**:

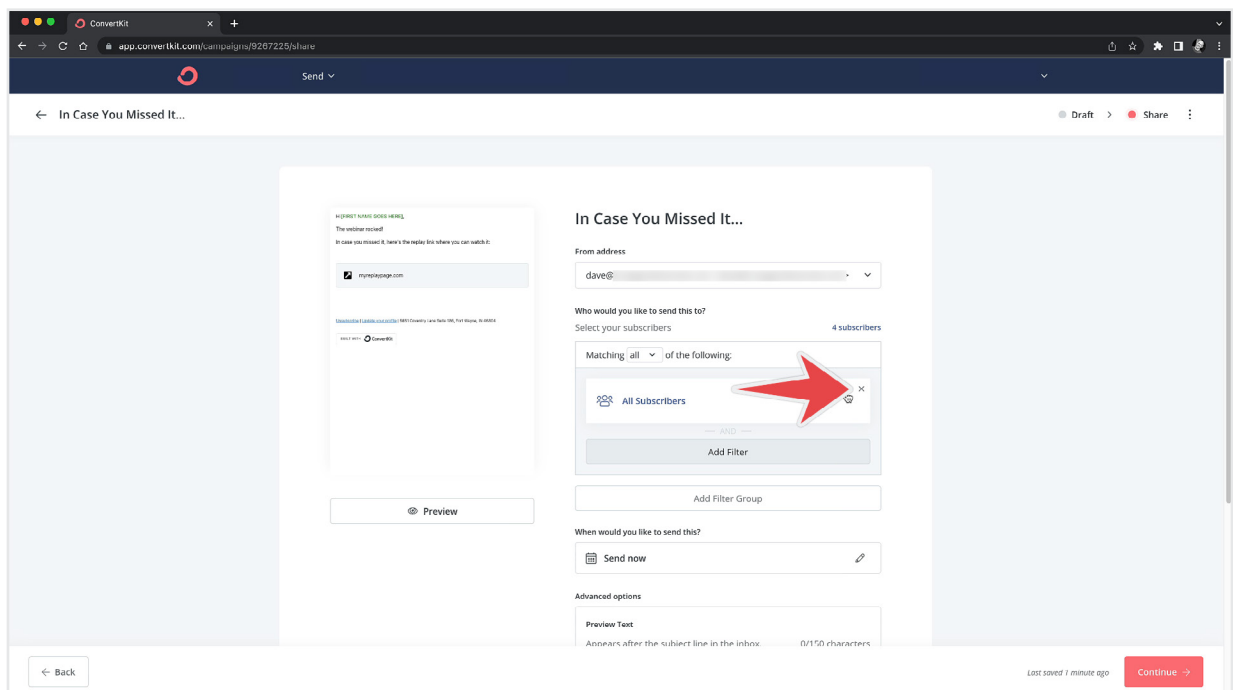
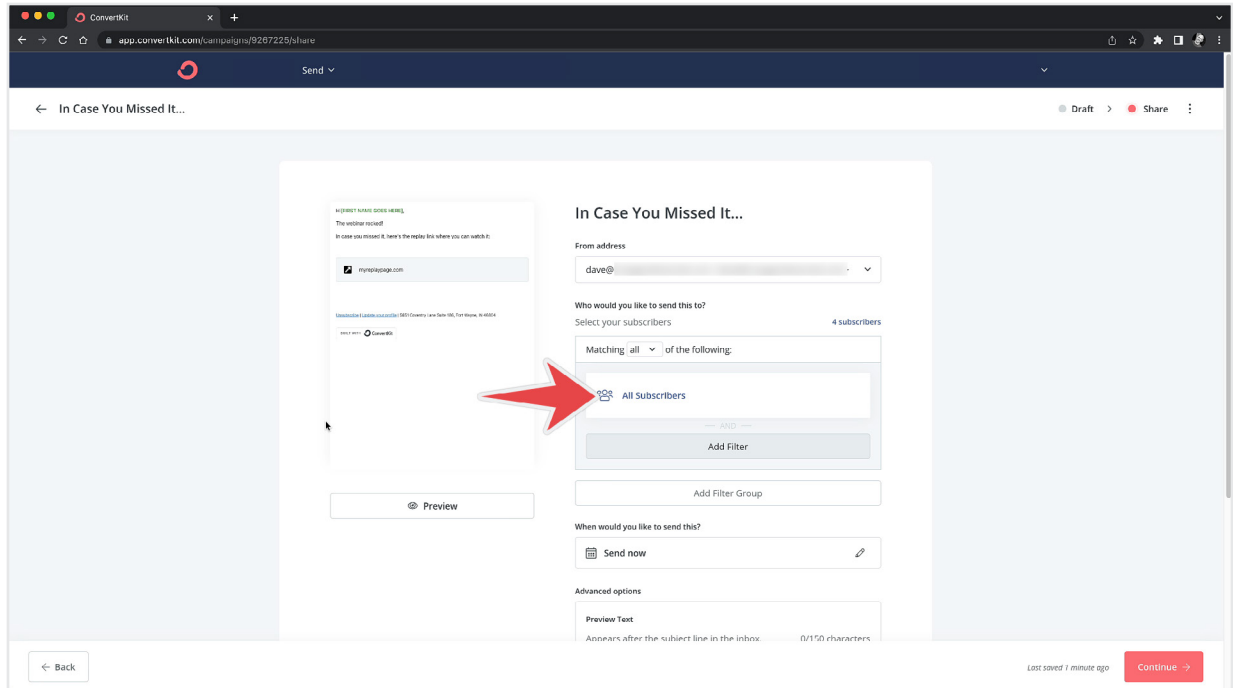
The screenshot shows the ConvertKit email editor interface. The subject line is "In Case You Missed It...". The email body contains a personalized greeting "Hi([subscriber.first_name])", followed by "The webinar rocked!" and "In case you missed it, here's the replay link where you can watch it:". Below this text is a text input field containing the URL "https://myreplaypage.com/watch". A red arrow points to the "Add link" button located to the right of the input field. The right sidebar shows the "Links" section with various styling options like background color, text color, font size, and border radius. At the bottom right, there is a "Continue" button.

When you're done adding all of your content and links, click on **Continue**:

This screenshot shows the same ConvertKit email editor after the link has been added. The link "myreplaypage.com" is now listed in the "Links" section of the right sidebar. The email body shows the link as a clickable element. A red arrow points to the "Continue" button at the bottom right of the editor. The "Add link" button is no longer visible, and a dashed box indicates where a new link can be added.

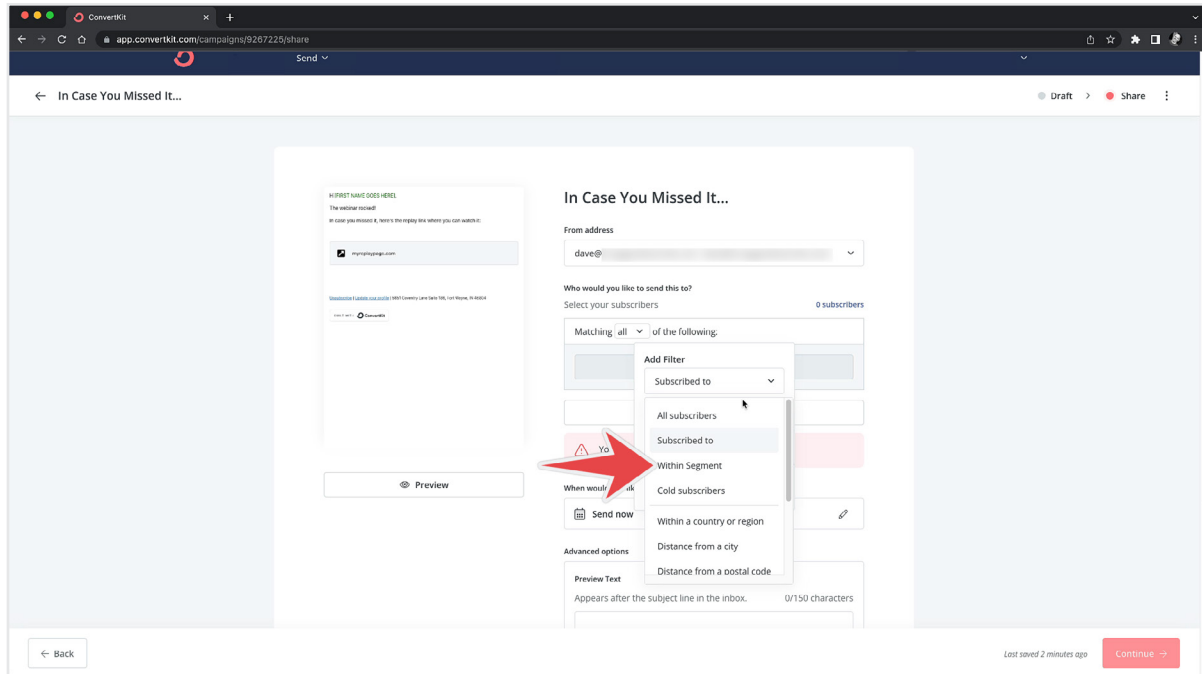
You will see a preview of your email and you'll be asked who should receive the broadcast. And this is where all of the work you did creating segments comes into play, because it will make it very easy to select the recipients of your broadcast.

By default, ConvertKit wants to send the broadcast to all subscribers. But you don't want that, so click on the **X**:

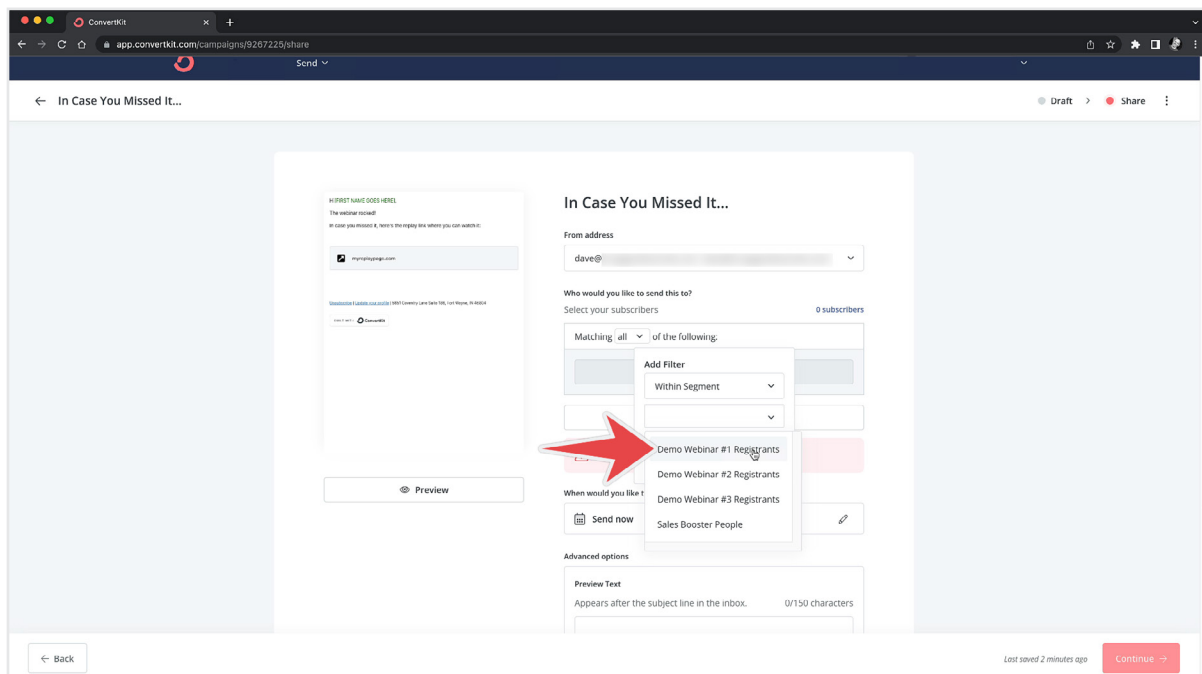


Then click on **Add Filter**:

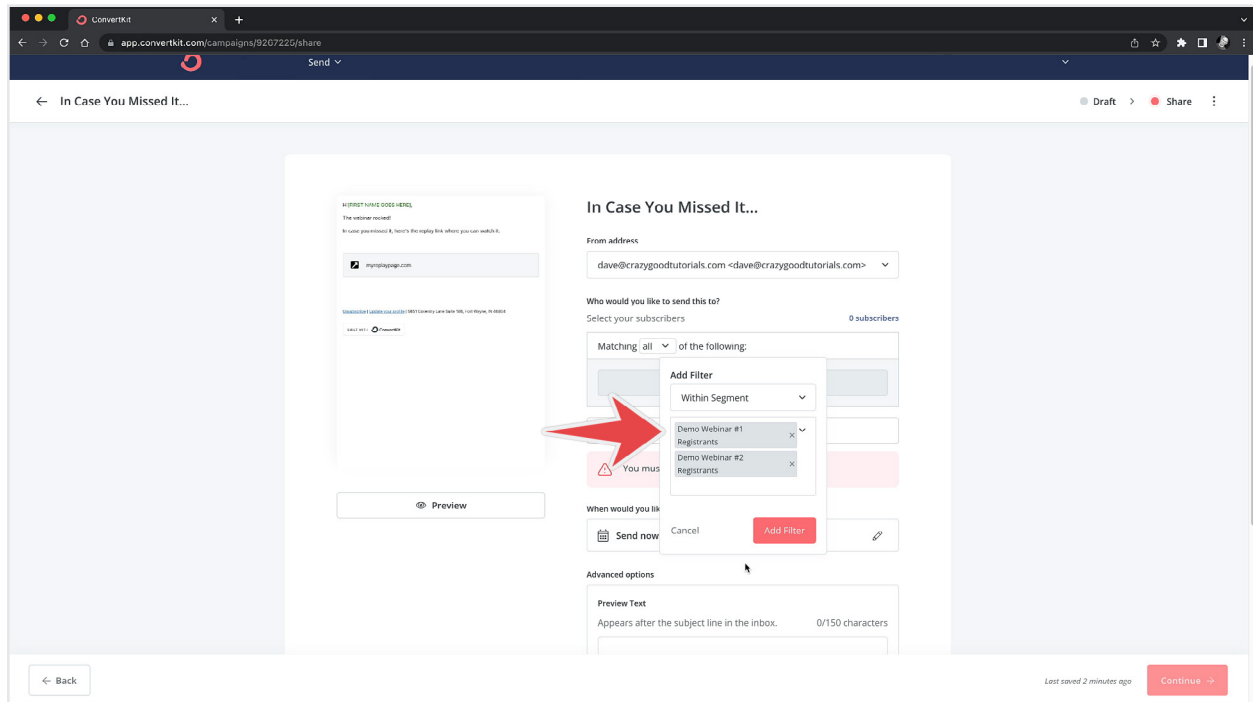
In the dialogue that appears, select to **Subscribe to** and then **Within Segment**:



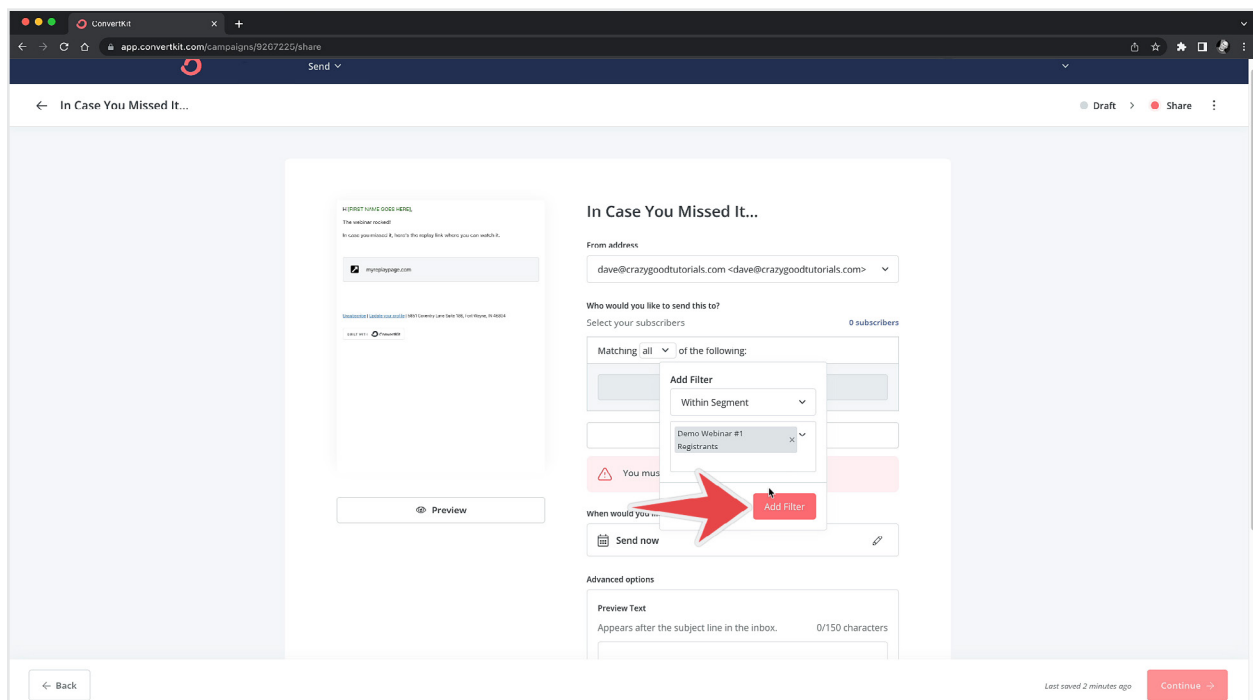
Now you can select any of the segments you created. In this example, I'm sending the broadcast to the registrants of my first webinar, so I'll select that segment:



Now, please be aware that as part of Amy's framework, sometimes you'll be sending the same email to multiple segments. And if that were the case here, all you would have to do is continue selecting additional segments:



But in this example, I'm only sending it one segment so I'll select it and click **Add Filter**:

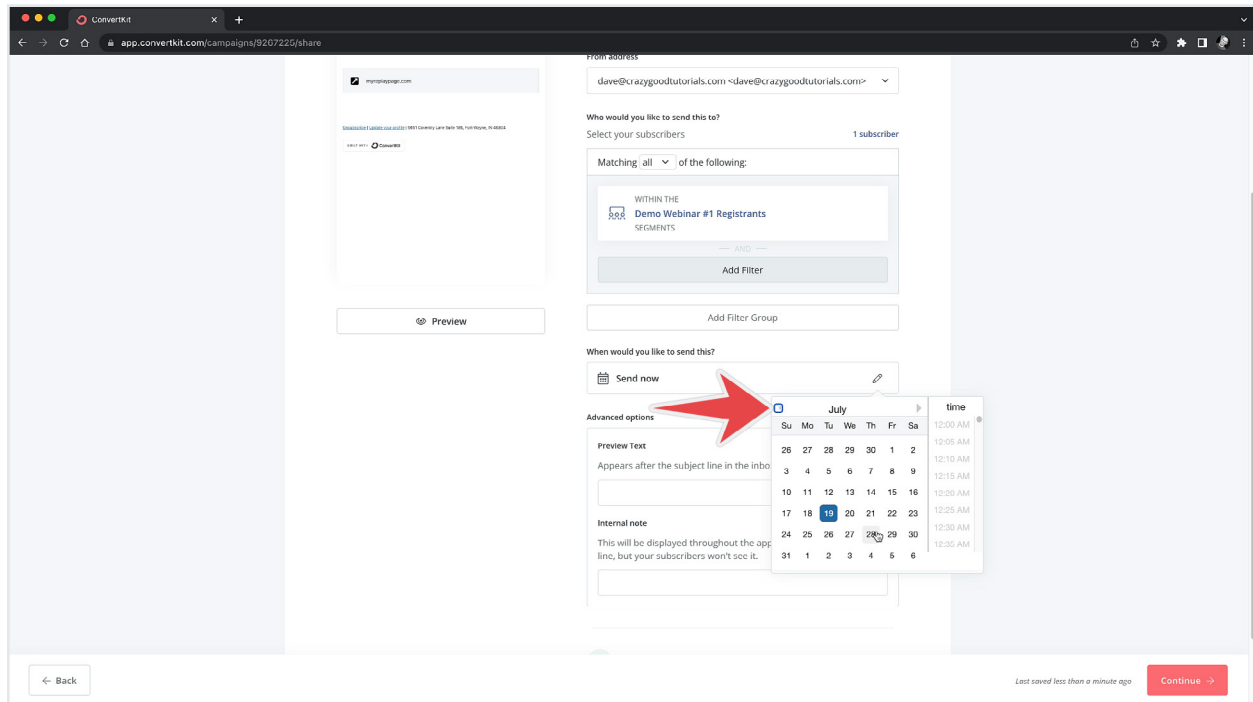


Now scroll down and you'll be asked when you want to send the broadcast. You could send it right now or you could schedule it for a future date and time. Which option you prefer is entirely up to you:

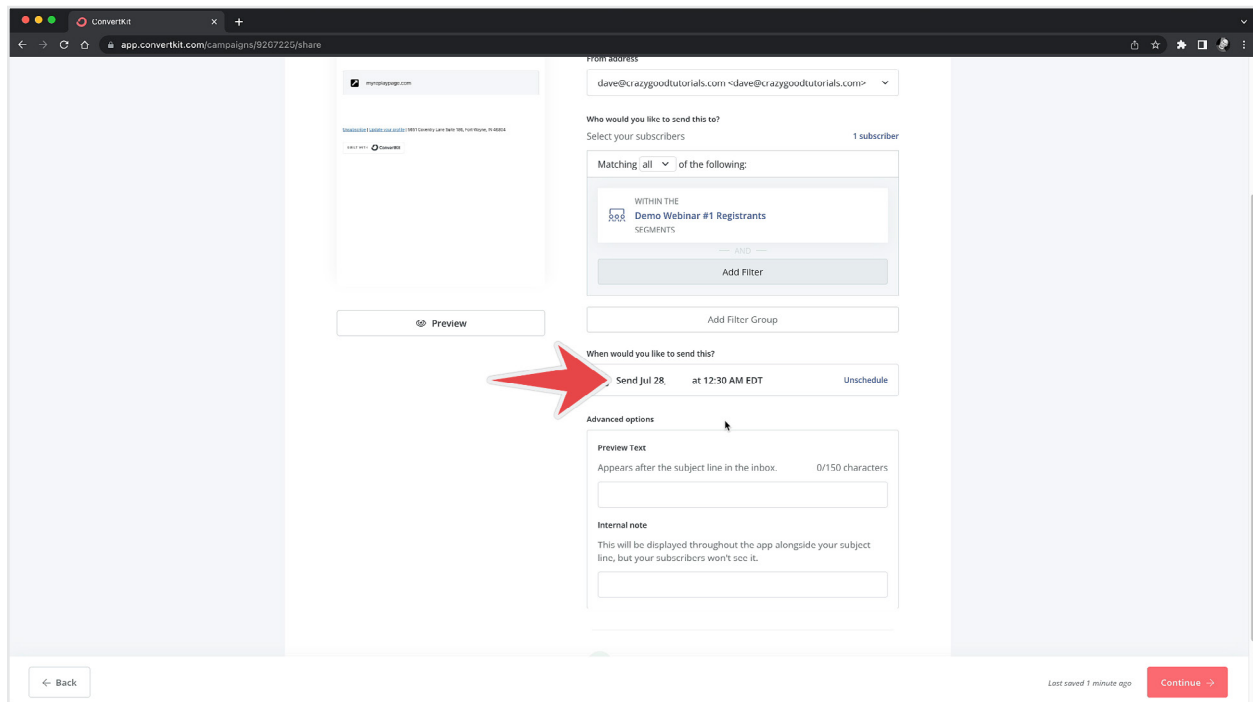
The screenshot shows the ConvertKit campaign setup interface. On the left, there's a preview of the email content. The main area is divided into sections: 'From address' (dave@), 'Who would you like to send this to?' (1 subscriber), 'Matching: all of the following:' (WITHIN THE Demo Webinar #1 Registrants SEGMENTS), 'Add Filter', 'Add Filter Group', 'When would you like to send this?' (Send now), and 'Advanced options' (Preview Text, Internal note). A red arrow points to the 'Send now' button. At the bottom, there's a 'Back' button and a 'Continue' button.

This screenshot is identical to the one above, showing the ConvertKit campaign setup interface. A red arrow points to the 'Send now' button under the 'When would you like to send this?' section. The interface includes a preview on the left, a 'From address' field, subscriber selection, segment filtering, and scheduling options. The 'Send now' button is highlighted with a red arrow.

In this example, I'll have you schedule the broadcast to be sent at a future date and time. So click on the **pencil icon** and a dialog will appear where you can select the **date and time**:



After selecting the date and time you can see it scheduled:



Then click on **Continue**:

From address
dave@crazygoodtutorials.com <dave@crazygoodtutorials.com>

Who would you like to send this to?
Select your subscribers 1 subscriber

Matching all of the following:

WITHIN THE
Demo Webinar #1 Registrants
SEGMENTS

ADD

Add Filter

Add Filter Group

When would you like to send this?

Send Jul 28 at 12:30 AM EDT Unschedule

Advanced options

Preview Text
Appears after the subject line in the inbox. 0/150 characters

Internal note
This will be displayed throughout the app alongside your subject line, but your subscribers won't see it.

← Back

Last saved 1 minute ago

Continue →

You'll be asked to review everything and then click on **Schedule Broadcast**:

Ready to send this to your subscribers?

Sending from
[Redacted]

Sending to
Segment
1 subscriber

Your Broadcast

REPLAY: DEMO WEBINAR #1
The webinar kicked off!
If you missed it, here's the replay link where you can watch it:

https://crazygoodtutorials.com/watch/1234567890

ADD

ADD FILTER

Schedule Broadcast

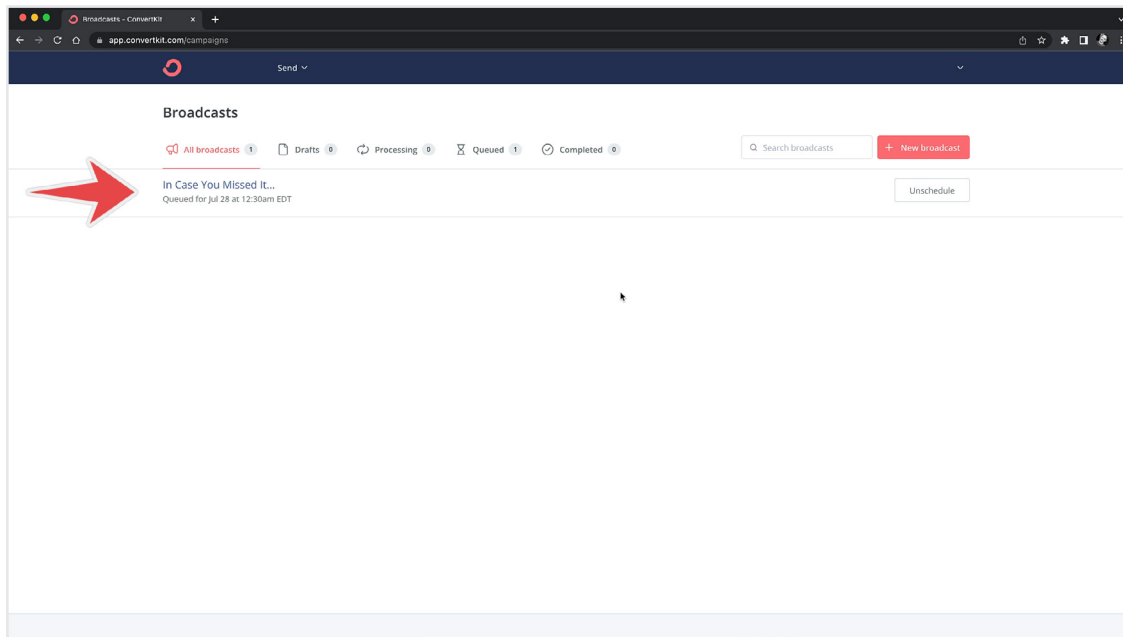
This will send to your 1 selected subscriber on 07/28/22 at 12:30:00 AM EDT.

← Back

Last saved 1 minute ago

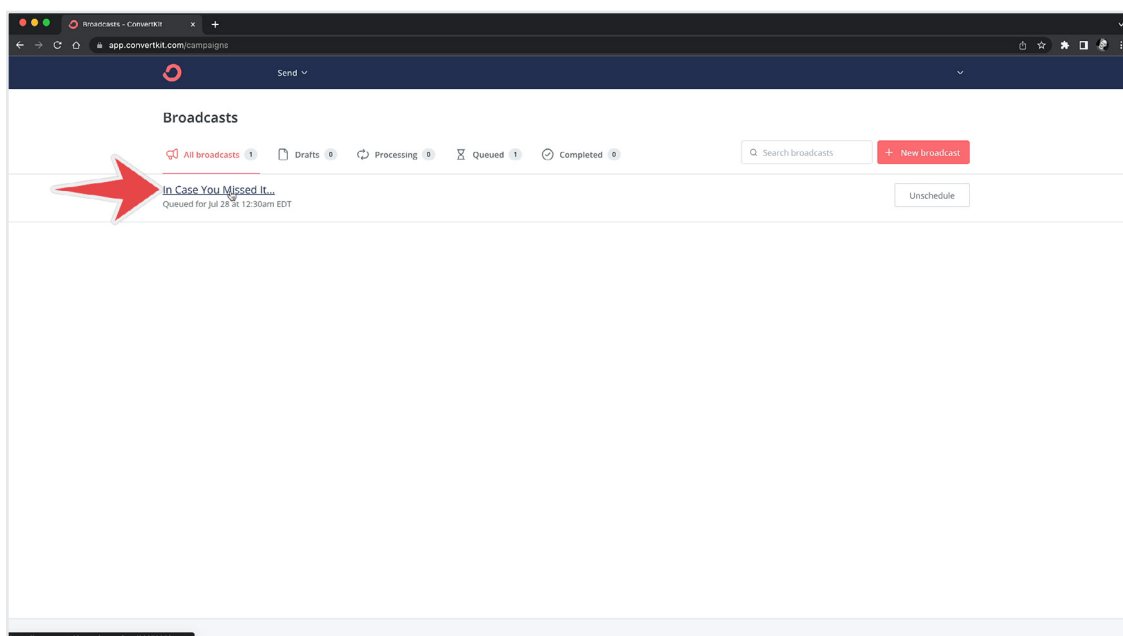
Continue →

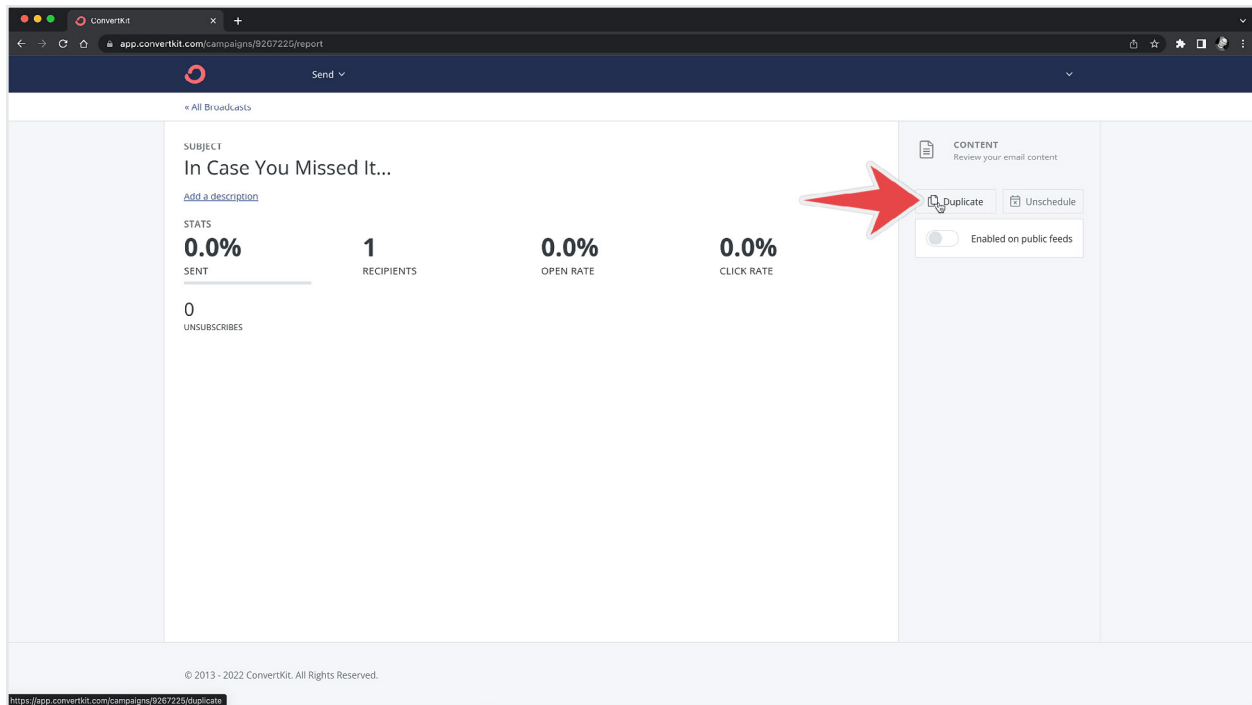
You'll then see your broadcast schedule in ConvertKit:



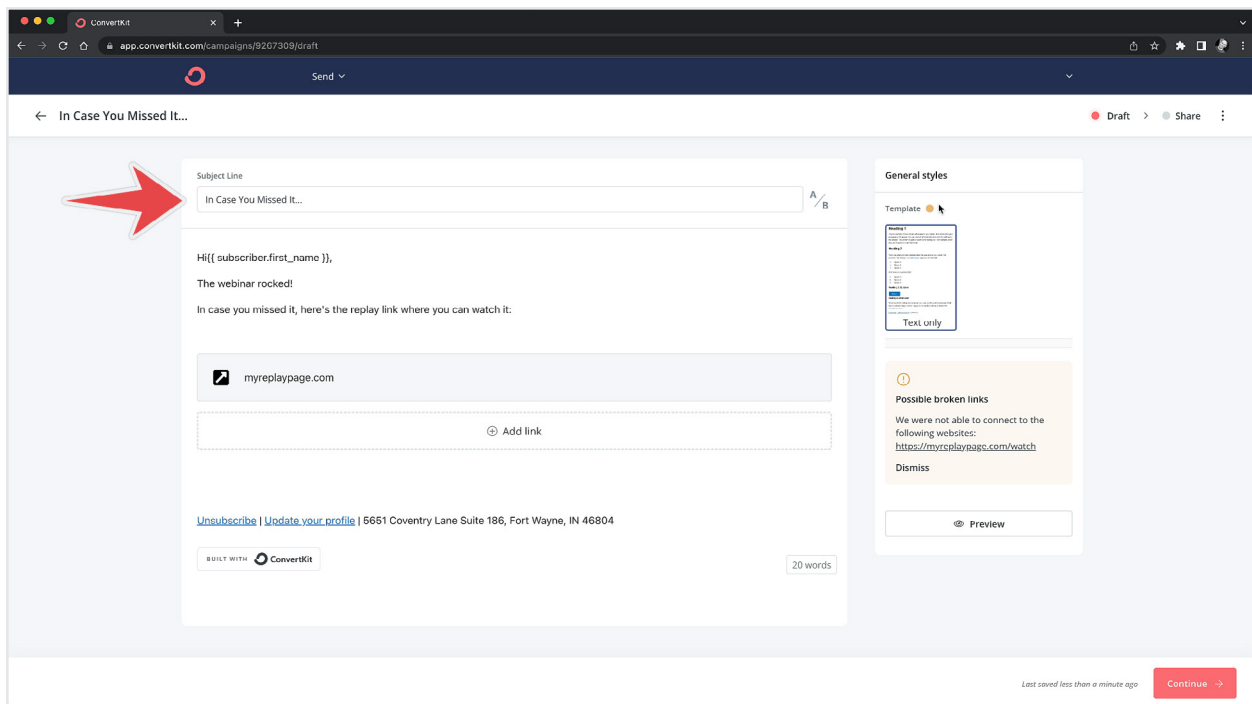
With Amy's framework, you'll be sending out a lot of emails and sometimes these will be similar emails, but to different segments.

For example, the webinar replay email that I just created is being sent to my first webinar registrants, but I'll be sending a webinar replay email to my second webinar registrants too. So rather than re-creating the webinar replay email from scratch, you can save time by duplicating it. To do this, click on the **title** and then select **Duplicate**:





You'll be asked to change the content. After you've made any changes, click **Continue**:



Now you need to select who the email should be sent to. Click the **X** to clear the current selection and then click on **Add filter**:

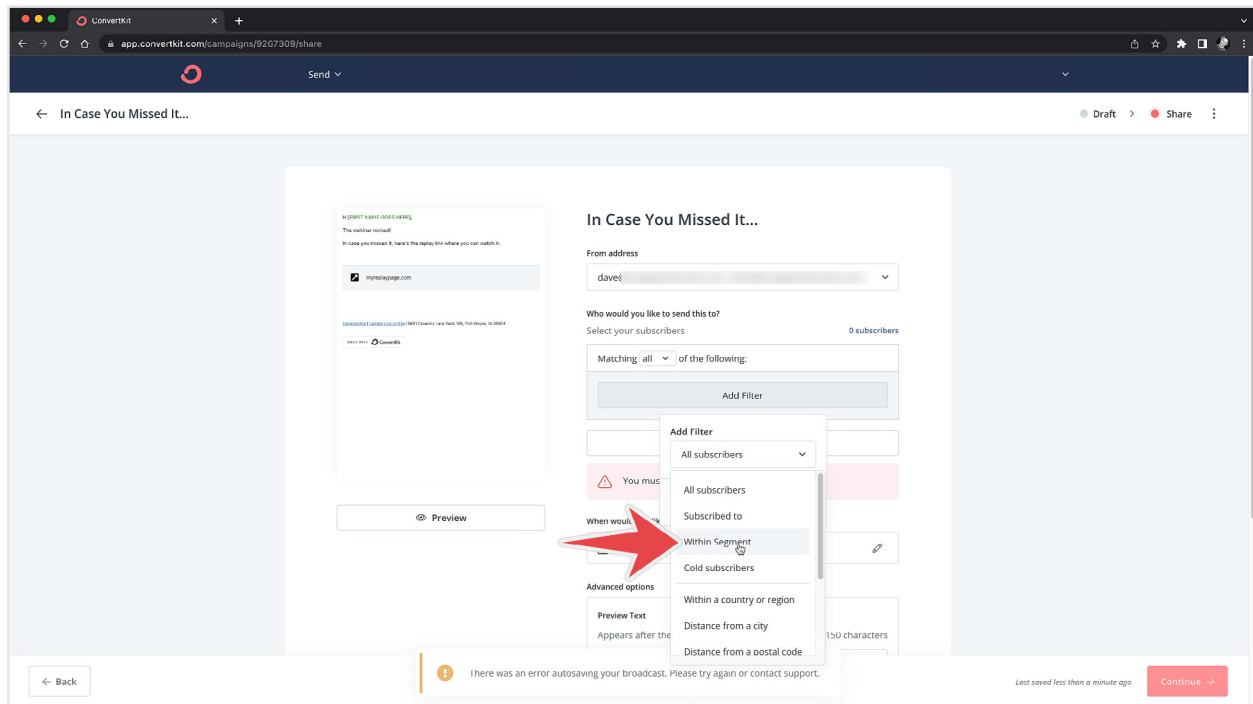
The screenshot shows the 'In Case You Missed It...' email configuration interface. On the left is a preview of the email content. The main form includes:

- From address:** A dropdown menu showing 'dave@'.
- Who would you like to send this to?** A section titled 'Select your subscribers' showing '1 subscriber'. It contains a list with 'Matching: all' and 'of the following:'. Below this is a card for 'WITHIN THE Demo Webinar #1 Registrants SEGMENTS' with an 'X' icon and a red arrow pointing to it.
- Add Filter:** A button below the subscriber list.
- When would you like to send this?** A dropdown menu showing 'Send now'.
- Advanced options:** A section with a 'Preview Text' field.

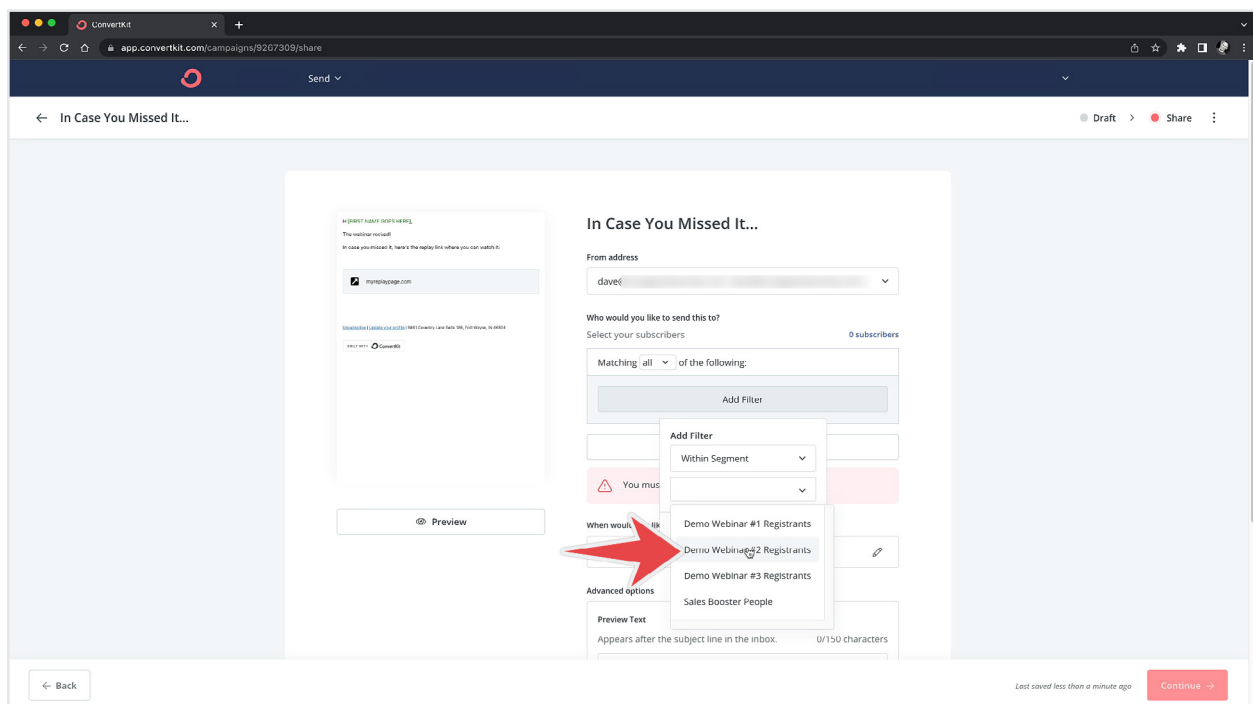
At the bottom, there is a 'Back' button on the left and a 'Continue' button on the right, with a status message 'Last saved less than a minute ago'.

This screenshot shows the same 'In Case You Missed It...' email configuration interface, but with the subscriber selection cleared. The 'Who would you like to send this to?' section now shows '0 subscribers'. A red arrow points to the 'Add Filter' button. The 'Advanced options' section now includes a 'Preview Text' field with the placeholder 'Appears after the subject line in the inbox.' and a character count '0/150 characters'. The 'Internal note' field is also visible.

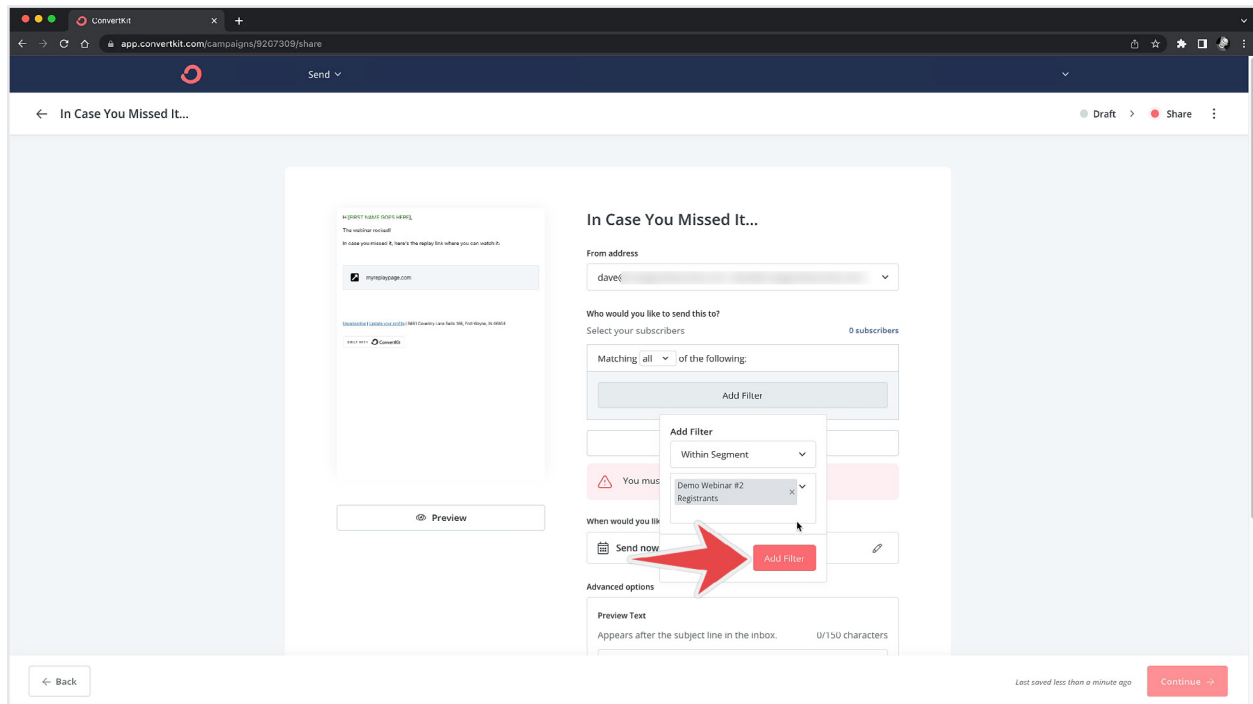
From the dropdown that appears, select **Within Segment**:



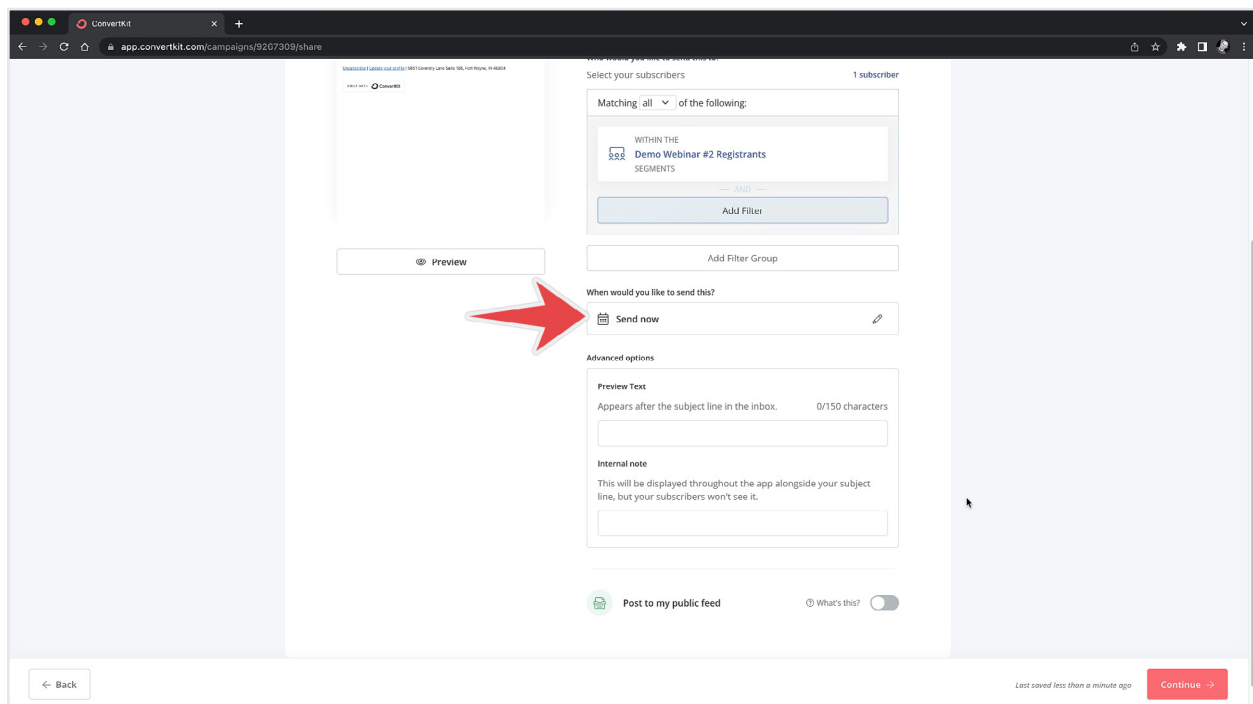
And from the dropdown below that, select the segment you'd like to send the email to:



Then click **Add Filter**:



Scroll down and once again you'll be asked if you want to send the email right now or schedule it for a future date and time. In this example, I've scheduled the email for a future date and time. Then click **Continue**:



ConvertKit

app.convertkit.com/campaigns/9207309/share

1 subscriber

Select your subscribers

Matching all of the following:

WITHIN THE
Demo Webinar #2 Registrants
SEGMENTS

ADD

Add Filter

Add Filter Group

When would you like to send this?

Send now

Advanced options

Preview Text
Appears after the subject line in the inbox. 0/150 characters

Internal note
This will be displayed throughout the app alongside your subject line, but your subscribers won't see it.

Post to my public feed

What's this?

Back

Last saved less than a minute ago

Continue

ConvertKit

app.convertkit.com/campaigns/9207309/share

1 subscriber

Select your subscribers

Matching all of the following:

WITHIN THE
Demo Webinar #2 Registrants
SEGMENTS

ADD

Add Filter

Add Filter Group

When would you like to send this?

Send Aug 4 at 05:20 PM EDT Unschedule

Advanced options

Preview Text
Appears after the subject line in the inbox. 0/150 characters

Internal note
This will be displayed throughout the app alongside your subject line, but your subscribers won't see it.

Post to my public feed

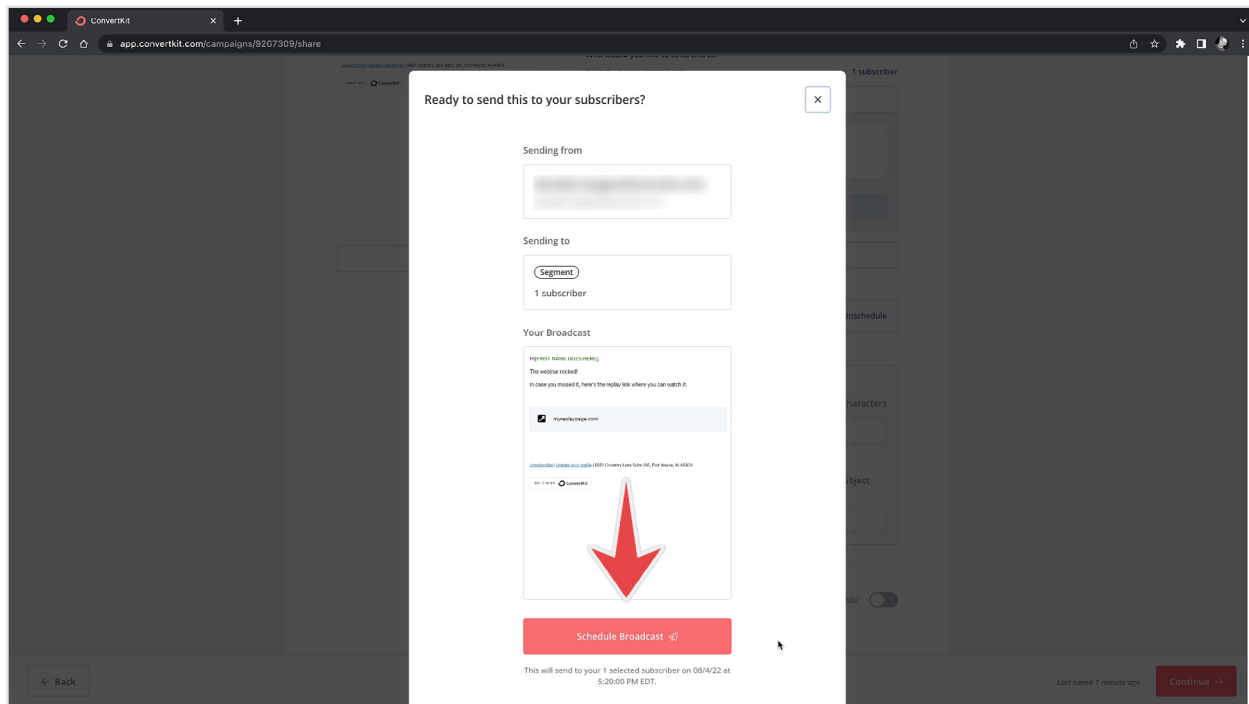
What's this?

Back

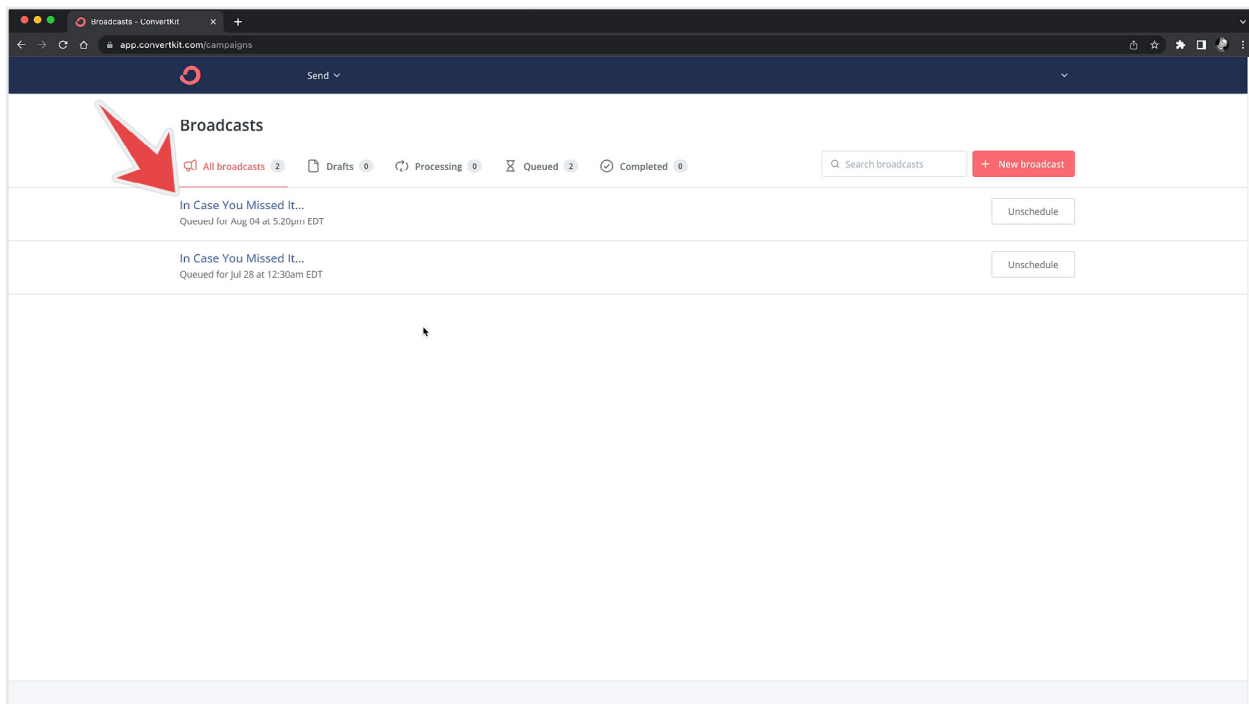
Last saved less than a minute ago

Continue

You'll see the confirmation screen. Click **Schedule Broadcast**:



And now your second broadcast will appear in the list with the others:



And guess what? That's it. So, congratulations! Now you know how to use ConvertKit for sending all of the emails for your live webinar course launch.