

Episode 197: How To Create An Epic Summit Playbook

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Speaker: Dr. Mark T. Wade

Dr. Mark T. Wade ([00:30](#)):

Give your audience the wow they want with the structure they need. Give them a Summit Playbook. All right, it's time we talk about how to build out your playbook. Hey, there everyone, Happy New Year. Dr. Mark T. Wade, your founder Virtual Summits Software, your host here on the Virtual Summit Podcast. Uh, and I am excited. We're off to a great new year and I have an incredible episode to start us off with one we haven't talked about yet. One that is super important for your summit. Now, before we do that, I want to remind you to check out episode 195 on the Virtual Summit Podcast. If you have not already to get my 2021 predictions for virtual summits, you want to hear that episode. There is some incredible information there, and also, I just want to remind you about Summit Fest Live. Summit Fest Live is right around the corner.

Dr. Mark ([01:30](#)):

We have an incredible lineup of amazing summit hosts and amazing virtual event hosts as well as virtual event agencies, producers giving you all their insights, strategical implementation into how you can improve your summit in different virtual events. So you want to check that out. We have both in-person option. If you want to grab one of our super VIP passes, we have very small number of those available. And then of course, we've got our virtual paths, so you can interact in real time virtually with us from the comfort of your own home. So check that out over at <https://summitfestlive.com>. Now we're talking about Summit Playbooks today, um, and this is an incredible, um, uh, topic one that I think a lot of you are going to be very interested in using one that I think gets a little extra complexity than it needs.

Dr. Mark ([02:21](#)):

I think a lot of times some summit hosts don't even one aren't aware of it. And two, when they are aware of it are like, well, I just don't have time or energy to do this. Uh, and they don't end up moving forward with it. I highly, highly highly recommend that you incorporate a Summit Playbook into your virtual summit. So first I'm like, what is, what is a Summit Playbook? So a summit playbook is essentially a workbook or a resource guide that you give to your summit attendees that gives them the information they need that relates to your virtual summit. Well, the power of this is it's really helping you, one, over deliver on experience because it should be tied into the theme of your summit, but it also helps guide your audience in the direction you want them to gives them the information they need.

Dr. Mark ([03:06](#)):

So it reduces confusions or concerns or questions, which helps your support team. But the main thing it's doing is directing them in the direction you want, which is typically to go to your, uh, summit offer. Now I'm going to share my screen here, and we're going to actually walk through one of my Summit Playbooks. And I'm going to give you the framework of the format that we use to do summit playbooks. Now you can take that exact same framework, implement it into your own virtual summit, of course. Um, and if you're listening to this, for those of you on the podcast here, um, what you're going to want to do is go over to the show notes, <https://podcast.virtualsummits.com/197>. And you can get a copy of this playbook too. So I'm going to walk through it. I'm going to give it as much, uh, uh, examples are clarity and details as possible.

Dr. Mark (03:53):

So those of you listening in can get the insights as well. Um, but the format is going to be the same. So we're going to start off, we've got a title page, okay. We're going to start off with a title page, which is just the cover. Okay? The cover is what you want. Something that is attractive. That's sexy, that catches their attention. Don't start off with a boring title page. So that brings me to my first point is in last year, a bit of a graphic designer or you're, you're fluent with Canva over at <https://canva.com>. This is one of those things that you're going to put together, but you probably want to outsource out to a graphic designer to format and make it look good. This represents you and your summit. And for some people, it may be the only thing they get from your summit. Meaning not everybody is going to actually go through and watch all of your different all of the summit sessions. Some people I know as much as it sucks, they're not going to watch any of them, but if they get this delivered to them, you may still get the engagement, get a relationship and potentially even a sale, even if they don't participate in the actual sessions. And I know it sounds crazy, but it happens. So you're going to want this to represent you your brand and your summit. So make that cover page, make that title page, something that looks great.

Dr. Mark (05:27):

The next aspect is what we're going to call the summary page. Okay. Now a summary page is really, probably more than one page. It's a lot of different things, but just to kind of group this into one session, one, one, one amount of information, the summary page, um, and on my Summit Playbook here, we've got a nice little clip board that says Summit Playbook by Dr. Mark T. Wade. And it's got our Summit Talks logo there and it's just a nice graphic image. It's got like a clipboard with a like, you know the X's and O's on a football field or a field there. Now the next page, it starts off with a big welcome image and a Scott, the dates of the summit. And then he's got a little welcome a description from me saying, Hey, you know, welcome Summit Talks the virtual summit on virtual summit.

Dr. Mark (06:10):

So it's just give him a little hello. The next thing is important links. Now the welcome is kind of that soft intro. The important links now is what do they need to know what links do they need to have to get to that next thing? So, uh, we have here list that registration page, the Summit Talks Facebook group, we got the Summit Talks event page. This is where they're going to actually access the summit. We've got the Summit Talks special offers page, which is our sales page. And then we've got our support email listed there. Super important. Have your support email listed in a variety of different places for one, but for sure right there in your Summit Playbook so people can get help, get ahold of you and get their questions answered. So next we got what to expect. And what I like about this one thing I'll mention here is this is a lot of text.

Dr. Mark (06:58):

Actually, if you're looking at this, there's a lot of text here, but it's been broken up with colors, formatting and boxes. So we're giving them a lot of information they may not want, or they may not most likely read all of this information, but we need to have it there for them. And if this is just straight text and again, another reason why it's great to get a graphic designer to help you with this, people are just going to be overwhelmed. They're not going to read it all. So here we got the what to expect and it's broken up in this little purple box that makes it stand out differently. And this just explains how we are going to run this summit. Well with the Summit Talks summit, we actually had sessions available for 48 hours. So it explains when they're going to get access to it.

Dr. Mark ([07:38](#)):

It also talks about a special event we had going on, which was our live streaming sessions. We did two live streaming sessions a day. So I put that in there so that they would understand that and, and know what to expect. It explains all of the other. And so it explains what to expect. All of the sessions are prerecorded. You can go in watch which ones you want. You have 48 hours to watch them. And then it, then they locked down. In addition to that, we have two, uh, we have two live streaming sessions every day, one at 1:00 PM, one at 7:00 PM. So I'm letting them know that the, the recorded sessions they can watch whenever they want. The live stream sessions are at this time and they have to be there at that time to see them. So I want them to know that in advance.

Dr. Mark ([08:22](#)):

So nobody gets frustrated if they miss it. Then we got how to participate. Okay? So this mainly here's telling them how you want them to participate. What do you want them to do? What action do you want them to take? What, you know, how do you want them to show up for your summit? Here? We say how to participate, play full out. The best way to get the most out of this event is to show up, participate, play full out. And then we describe what that means. So, and I give them a rough estimate of time so they can anticipate this. Now our summit talk summit was a massive, it was 10 days over 120 speakers. I do not recommend any of you start off like that at all. A matter of fact, I recommend you start off with a one day summit. However I wanted people to know.

Dr. Mark ([09:06](#)):

So they could play in their time in their days that you should spend at least one hour a day doing this. You could, should try and consume two to three talks. We actually had summaries, uh, throughout our, throughout the summit, which allowed people to kind of dip in and test things out to see what they wanted and then go deeper. And we talk them through that. So they understand. Um, so that was how to participate. And then I gave some action items like what to do next. This is at this time, do this, be sure to post your takeaways, do that. We're going to give awards in this. So make sure you do this. And last of all, don't forget to play. Full-out it's you who will benefit. So action steps. What do you want them to do now from them from there? The next thing is, if you've got a live stream component in your summit, you might want to talk about that.

Dr. Mark ([09:53](#)):

So we did, we named ours summit builder live. So it's right here and it's broken up from the rest of the page, but with a different color and a different fonts. So our summit builder live, this was, we incorporated a challenge inside of our virtual summit. So we had it. And so I wanted to explain what those words, so they knew what was happening. We got day. One was introduction of virtual summits, day two summit theme and topic day three, et cetera, day, four day, et cetera. So we listed that out there so they would know what was coming. I also wanted them excited about what was happening. I wanted them to be paying attention to the entire summit. So this here, um, you know, maybe you don't have any lives, but maybe this is where you're actually talking about your themes or your tracks.

Dr. Mark ([10:37](#)):

If you have different tracks for your summit. So, you know, maybe you have different categories. This is where you would talk about that. You want them excited about the whole summit, not just day one and day two. Um, and if it's a one day summit, you want them excited about all of the sessions, not just session one, session two. So this may be actually where you elaborate on the sessions and then the next

spot is about the host. This is you. So you want them again to build a relationship with you. So you want to give them some of the information about you, help them understand why you are the expert. This builds your authority. This builds your influence. This is where you want to talk about that. So now after that, we get into some of the technical aspects. So now, well actually let me rephrase that.

Dr. Mark ([11:17](#)):

So here we didn't actually incorporate our sponsors into this. So if you're watching, if you're looking at this here, the next thing we would have had, or should have had was sponsors. Now you don't want to start off your Summit Playbook with your sponsors, but remember your sponsors are important. If you put them at the end of the Summit Playbook, they're going to think you don't care about them. So you want them at the beginning. It also makes you look good. So here you would either use logos and a brief description or any kind of offer maybe that the summit that the sponsors are doing or any kind of direction or influence or positionings you want to give to those sponsors, that would be next. So after about the host, you'd have your sponsors. We did not have that on this, um, on this Summit Playbook.

Dr. Mark ([11:59](#)):

So then the next step after that is we started to get into the details. So we have support. So we want to tell them exactly what to do, what to know if you, you know, here's the key, you know, we are here for you. If you're trying to access your purchases, remember this, if you're to check your inbox, check your spam, check your promo folders because you know, 99% of the time it's there. But if you still can't find it, then reach us here, and then the email, the important thing here is you want to play to the ear, to their empathetic side. You want to play to their emotions, let them know, Hey, we really want you to have a great experience. We're a small team. So please be patient. When you're reaching out, please don't send more than one email about the same thing. It slows everything down. This is where you kind of let them know what to expect as far as your response time. So, you know, at least to have that, tell them to have a little bit of patience with you as well.

Dr. Mark ([13:14](#)):

Now you want to talk about your offers. So this is where you lay out your offers. We've got our VIP, all access pass. So we've got our summit offers, which is summit super pack. We've got our summit pack and then we got our summit pass. This was our offers to three different offers. We got those, there was some cool looking images, uh, and then little descriptions and the overall value. And then of course at the top of this, we actually talk about one of the bonuses we included in our offers, which was a really big pull that got people to actually purchase more people to even purchase, which was our VIP all access pass.

Dr. Mark ([13:44](#)):

Since we were having a live streams each day, we allowed people who bought the summit offers to come on to the Zooms with us so that we call that the VIP all access pass. You got front row access to me and my speakers. So that was a big pull we wanted to talk about that right there. Cause we knew that was going to pull people into it. So we talked about that. Then we listed out our summit offers, the summit super pack, the summit pack, and then the summit pass. Then after that, we listed out the summit agenda. Now we actually built out, you know, a nice little image here with each speaker, the different tracks, how it, you know, fit into each of the days.

Dr. Mark ([14:27](#)):

But you could literally just have listed out a summit itinerary or agenda. Like let people know what's happening. What's coming. Unless for some reason there's a secret, but you still want them to know what to expect as far as the days are concerned. So they can plan for it, especially any lives. How many days, how much is there. So they understand, uh, what's what to expect. Now you are going to be selling a post summit offer. You're going to be you're. The whole point of the virtual summit is to build that relationship, create know, like and trust to then move along the customer journey into the post summit profit strategy. That first step is that post summit offer. The thing is you don't want to sell the post summit offer right now in the summit, but you want people getting excited about what's coming. So we always recommend selling that post them an offer on a special event, you create some kind of event that people want to have access to.

Dr. Mark ([15:20](#)):

They want to be a part of it. They're going to get something. For example, this is like we did a live in online training or a workshop, you know, depending on what, what you're selling, you don't want it to correlate. We did ours as a live in online because we were selling our Summit Genesis Workshop. So we did it as a training instead of workshop, if you were selling a course or your consultation services, et cetera, you might want to do it as a workshop, but you want that. We had ours as a virtual event, revenue class, the virtual event, revenue class join us live and online. So we created this event and let them know. And we said, this is invite only. You must be a VIP. You must've been one of the summit offers to get access to this. This was the way we did it.

Dr. Mark ([16:01](#)):

I'm not saying you should exclude people, but if you can create some kind of urgency and excitement around your event, and of course, by putting it here in your Summit Playbook, then it's really going to drive people to show up. Because what you don't want to have happen is when you go to do your webinar to sell your post summit offer, you don't have anybody there. So create excitement from day one from the very beginning about the event where you will sell your posts, I'm an offer. So we did it as a webinar, um, and you want to make it so people want to attend. The next we get into the FAQ's, the frequently asked questions. Here's the thing you do want to handle any of the top support questions, but really your frequently asked questions should be supporting the selling of your summit offer.

Dr. Mark ([16:47](#)):

That's the questions you're trying to answer. The questions that people are going to have about buying your summit offer. So our questions are how, how long are the talks available? Why? Because we want them to know they're only available for 24 hours, 48 hours, or however long you decide to set yours to. They have that amount of time. And after that, they're there they're locked. However, you can maintain access to those. If you purchase one of the summit passes or one of your summit offers, the next question we had was how can you, how can I access sessions? I missed. We say, well, you know that, you know, if you miss them, you know, you have this amount of time, but if you miss them, you can access them by purchasing one of the summit passes. Um, so we talk about the past and the on demand access.

Dr. Mark ([17:30](#)):

The next question we listed there is how do I access the items I purchased? Now, this is something important because you want to make sure you don't start to get refund requests, right? Quickest way to get refund requests is when people can access the stuff that they've purchased. So let them know how

to find it, how to get access to it. And you may think, well, I'm sending it to an email, sending them an email with it, Mark. Those emails are going to spam and promos and people just miss them. So make sure you let them know here, how to get it in and how to get access to you if they can't find it. Next question we asked is how do I get on the Zoom calls with Dr. Mark? Won't remember that's what we were selling. We were selling that VIP all access.

Dr. Mark ([18:09](#)):

So they may not even know. They could get on the zoom calls with me. So we're positioning our questions to support the thing we're trying to sell. Now they're going wait. I can get on the zoom calls with Dr. Mark. How do I do that? And then it talks about how, you know, how to get that through the VIP, all access pass, which is purchase in one of the seminar offers. And then it lists out how we do that process. You know, we, uh, you know, you'll get an email camera's must be on, et cetera. Next question was, what is the virtual event? Revenue class? What are we doing? We're talking up the class again to sell the post summit offer and then any kind of a refund policy you may have, like, can I get a refund question, Mark? So if you offer a refund, this is where you'll talk about it.

Dr. Mark ([18:49](#)):

If you have special stipulations, that's where you, you would mention those. Talk about those. If you don't have one, be clear here, this is important. And then the next question is, why should I purchase the summit pass? Again, questions are supporting the sales of the seminar offer. And then the last question I have here is what happens if I wait until the end of by the summit pass. Cause you know, people are going to try and wait until the end, right? So we want to encourage them. Here's what will happen. We said first off, you'll miss out on mazing opportunities to get front row access to Dr. Mark. Plus, you'll miss this. Additionally, if you wait until the summit ends, the price is going to go up. So we do things to encourage them to purchase the offer. That's what your frequently asked questions really are there answering questions that your audience may not even know they have yet, but to support the sale.

Dr. Mark ([19:37](#)):

That's one of the other reasons Summit Playbooks are so powerful now after that. So again, that's refund. We want to tell them why to purchase and then overcome the urge to wait. The next part is your speakers. So you're going to have your speakers all listed here. We've got a section, says PA speakers. We did this in alphabetical order by last name. However, if you are doing tiers like featured speakers, you'll want to put those featured speakers first. And if you have a few of only a few of them, you may want to make their images bigger. You want to make your speakers feel good too. Especially if they're one of the ones promoting hard for you. And then at the end, after you've got all your speakers listed, the last thing you would have is resources. And that's going to look like this right here.

Dr. Mark ([20:22](#)):

So your resources. Yeah. What are those? Those are technically affiliate offers, right? Those are your referral links. So those are things that either you want to tell your attendees about, or there things that you took away from the interviews and the sessions with your speakers, and then you went and created referral links so that when people say, Hey, you know, how do I get access to that software that, um, so-and-so was talking about their session? You say, well, it's in the resource area and you can let everybody know, Hey, resources that we're talking about in the sessions are inside your Summit Playbook at the end, in the resource area. And then you can see here, you know, if they click any of these, you can do

this with a PDF. If you have this on your website as well, you could have those there. Those are trackable referral or affiliate links as well.

Dr. Mark ([21:35](#)):

So again, really quickly, let's just run through this. The Summit Playbook again, a Summit Playbook is for your virtual summit. It gives your attendees. It's like a workbook, if you will. And that's another version I would say right here, ours is more a, a guide, but you could have a workbook. Those are the two different kinds of variations. You have a guide or a workbook and your guide could have a workbook section in it. If you want. That's like a whole another level. We had 125 speakers. So we decided not to go workbook style. But if you're doing a one day summit, you may want to do that. You may want to take two or three top takeaways from each session, put them in the inside your Summit Playbook. And you can either give the answer or you can leave the answer blank and let them fill it in as they participate in the actual sessions.

Dr. Mark ([22:19](#)):

Again, this encourages, um, encourages them to show up and engage with the sessions. So I really do like the workbook style. Um, we just decided not to do it with this playbook because we had over 120 speakers and that would have been a lot of workbook in there. So if you're doing a one day summit or you have a micro summit or a smaller summit, um, you may want to incorporate a workbook aspect inside of it, which just takes away, maybe talk top tips, top, top lessons, or even some fill in the blanks from the sessions on your summit. Now let's just quickly recap. You start off with a nice appealing eye-grabbing visually appealing title page. Then you're going to have your quote unquote summary page, which is going to have your welcome. It's going to have important links.

Dr. Mark ([23:08](#)):

It's going to have what to expect, how to participate and then any kind of action steps that your audience needs to take. Then you're going to talk about your tracks, your themes, or if you've got live stream sessions each day, you're going to talk about that next. So let them know the different tracks, the different themes what's going to be beneficial for them. Get them excited about more than just day, one a day, to get them excited about the next steps or if you're doing a one-day summit, get them excited about each of the sessions next you're going to have about the host. This is them getting that relationship and information about you building your authority and your influence. Then next you would have your sponsors. We don't have it here in this playbook, but you would have your sponsors listed next. Then you've got your support.

Dr. Mark ([23:50](#)):

And if you're going to use any referral links or affiliate links with sponsors, you can put those there as well, at that point. Next, you got your support. How do they need to get in touch with you? What's the most common questions they're going to have answer those right there and how they can get in touch with you. Plus play into that empathy empathetic side of we're a small team, please be patient. Next, you're going to have your summit offers. Talk about the main thing that's going to pull them in and then list out those offers and the differences so they can quickly scan the differences between your summit offers. Then you're going to have a summit agenda or itinerary. Then you're going to talk about the event that you're going to be selling your post summit offer at. So this is like the webinar you're going to be doing created as a, as a workshop, as an event, as a training, as a class, something that gets them

excited, then you got your frequently asked questions, but remember frequently asked questions are actually questions, helping, helping close the sale.

Dr. Mark ([24:46](#)):

These are questions answering, uh, the, these are the questions that they have about the sale. Not just questions in general, you want to be pushing your sale here, help them make that decision. Then you're going to go through your speakers, either listed out now for medical order or featured or tears. And then the last aspect that you would have is your resources. So this is where you list out any of the resources you want to offer as affiliate links are just, it's just easy access for them to have. So that is how you do a Summit Playbook, a virtual Summit Playbook. This is so important. It does not take that much more time and energy to do most of the time. You're going to do this towards the end of your summit preparation, because you're going to need that information, but have it put together, have it put, have it designed by a graphic designer.

Dr. Mark ([25:34](#)):

Um, if you can to give it that extra professionalism, just make sure you do it. Okay. Is it absolutely fundamentally crucial that you do with Summit Playbook? No, you course you can still have a successful summit with it, but if you want to stand out, make your summit even better and get your attendees that wow factor while giving them the structure they need, then you definitely want to incorporate a Summit Playbook. So be sure to head over if you're checking this out on the podcast to our show notes at <https://podcast.virtualsummits.com/197>, to check out this Summit Playbook that I have here and remember your message matters. And one of the most powerful ways to get that message out to the world is with a virtual summit. I hope to see you at Summit Fest Live. Be sure to check out that information over at <https://summitfestlive.com> and then I'll see you on the next episode.

Dr. Mark ([26:44](#)):

Now I want to all the summit hosts listening right now, I believe in you and you can do this summits are by far one of the most powerful ways to quickly grow your list. Your platform make more money, and most importantly make an impact in the world, even if you're just getting started. So don't get caught up in analysis paralysis because the world needs to hear your message. And there are people who are waiting for you to help them just get started because imperfect action is always better than no action. Thank you and see you on the next episode.