

[00:00:00] **Krista:** Hey, hey, welcome to the Summit Host Hangout podcast, where you'll learn how to host a high-converting virtual summit that leads to your biggest signature offer launch yet. I'm your host, Krista, from Summit in a Box, and today I'm excited to bring in Elizabeth Neumann to talk about simplifying your summit systems with the right tech and automations.

[00:00:16] And I know that's something so many of you want help with, so I'm just excited to give you this episode today. Elizabeth, though, is a high-level certified business automation strategist who helps coaches, course creators, and service providers simplify their funnels, streamline their automations, and eliminate tech overwhelm.

[00:00:33] She builds clear, reliable lead and client journeys and systems that support business growth, and she is brilliant when it comes to turning chaotic, half-built setups into systems that finally work. So without further ado, let's dive in and talk with Elizabeth. Welcome, Elizabeth! I'm excited to finally have you on the podcast.

[00:00:51] **Elizabeth Neumann:** Krista, thank you so much for having me. Excited to be able to share some tips and different things that can help when it comes to tech and automation, especially for summits, 'cause it's, it can be quite a lot.

[00:01:01] **Krista:** Yeah, I know like, I feel like there are some people who are like, "Yep, no problem," but for a lot of people it can be, like, a, a heavy part of hosting a summit, and I hate that, right?

[00:01:09] I don't want the tech to be something that trips people up or makes it feel like this overwhelming project. So I know you have a lot of tips that can help out with that today. I'm curious to hear, like, what sent you down the rabbit hole of tech, though? Like, what was it about it that lit you up and now it's what you do for other people?

[00:01:26] **Elizabeth Neumann:** So I actually have been online for 10 years today, is actually when I left my full-time job, and the time that we're recording this. And I started off as a virtual assistant and just kind of started experimenting, seeing what I liked, what I was better at, you know, all of that, doing different roles along the way.

[00:01:44] And I started working with clients, and they all had tech and automation, right? It was a lot of coaches, and course creators, and membership owners that I was working with. And there was a time where early on, a client

had brought me in, and she had a team working on her ActiveCampaign at the time, and something happened where they didn't set something up properly, and something was messing up for her launch.

[00:02:07] And so I was able to just kind of go in, and I just kind of took a look, and I figured out what the problem was and was able to fix it in somewhere deep into the automation. And then I started realizing that I started to incorporate doing tech and automation for clients, and all these different roles.

[00:02:23] So over time, as I was doing more and more automation, back then it was, like, more ClickFunnels, ActiveCampaign, Kajabi. Like, you kind of name all of those, I've been in most of them. And I just realized that it was something that I actually liked because it felt like a challenge, and it was like a puzzle that you had to put together.

[00:02:39] And also just something that I think I just naturally went towards and could figure out and just it's, like, more like that logical piece. And so over the years, I ended up letting go and moving on from some of the other roles I was doing, and just started to focus only on the tech and automation, and so that's what I have done.

[00:02:59] And so there's a lot more to the story, but that's the, the general, uh, gist of every- of my journey here.

[00:03:05] **Krista:** Yeah. Oh, my goodness. Okay. I love it. And it's... I love that you found your way into the summit space as well and can, you know, talk specifically about that because it's one of those pieces, a lot of times people will come to us and want to host a summit before they have ever made a course or a pro - like, anything that requires automations like that, right? Like, a lot of times with services, we might have some stuff set up in Dubsado or whatever people are using these days, but it's a different ballgame when you get into the digital products and, you know, a summit is the first time a lot of people will do a lot of that stuff.

[00:03:36] **Elizabeth Neumann:** Right.

[00:03:37] **Krista:** Um, so, like, with that in mind, I guess, what are some of the most common tech mistakes you see summit hosts make?

[00:03:44] **Elizabeth Neumann:** Yeah, so I've set up summits for clients where I do the entire setup or most of it. Sometimes they have team members doing some pieces of it, or where I also did my own summit last year, and so I was

able to do that too. And this is towards summit hosts, but some of it is also just general issues and mistakes and things that happen with automation.

[00:04:08] So more specifically towards summit, I would say, waiting too close to the summit to set up the tech automation. I know there's a lot of pieces and a lot of planning and talking with the speakers and management and all that, but I've seen where all of a sudden it's getting close to the summit and a lot of it's not in place, or it's half in place, or hasn't been tested, and it's about to launch or, you know, things like that.

[00:04:32] So I would say definitely something to take a look at setting up and building ahead of time. And then kind of connected with that one of the biggest things I always will talk about is the fact of not planning the strategy behind the automation. So you have obviously, like, the summit strategy itself, like what you're gonna do for the summit and all of that planning, but there's also a strategy that's needed for the automation piece.

[00:04:56] And a lot of times, I find that people like to kind of skip that piece and just start to go in and start building, and so that can end up causing some issues and mistakes along the way or later on, even in the middle of the summit.

[00:05:08] And then the third, like, tech mistake that I, I see is not looking at what automation could be used to cut back on some of the work that needs to be done. Some of it could be even just how it can help the team get some of their internal pieces done. And so things with speaker management, things like that. So it's always good to be able to take a look at automation so that you could try to save time and save, like, the overwhelm ahead of time, so that way it makes it easier to put your time and energy into the actual presenting, or the speakers, or all of the other pieces of the summit, or what comes after the summit.

[00:05:44] And so that's what I always look at what automation can do so that it gives you time to do all the parts that you wanna do manually or that you need to be in front of the camera or whatever it may be.

[00:05:53] **Krista:** Mm-hmm. Oh my gosh, I love all those, and we are gonna dive into each of those a little deeper because I do think they're all so important.

[00:06:02] And I love that last point you made about not utilizing automations fully really because a summit is a big workload, and this is an opportunity, a lot of times a fairly low-cost opportunity, to take a bunch of work off of your plate or a team member's plate. So we will definitely dive into that a little bit more.

[00:06:18] Before we break down some of those pieces, we get asked about the best summit tech platforms all the time, and recently we had someone come on and talk about specific platforms, but I am always really hesitant to recommend anything specific.

[00:06:30] My usual go-to is, like, I want you to use whatever you're already using. I don't want you to figure out how to learn something brand new along with learning how to host a summit if you don't have to do that. So that's typically my recommendation, but I know there are also people who, like I said before, have only offered services, so s- some of the platform needs they just haven't run across yet and they need to switch or they're not happy with what they've been using.

[00:06:54] So with that in mind, what is your normal recommendation for, you know, kind of a go-to tech platform?

[00:07:02] **Elizabeth Neumann:** Yeah, so I do agree with your recommendation because, of course, we wanna make everything as simple as possible. And a lot of times someone could have the software already in place, or they might just need, like, one more piece to add on or something and just be able to use what they use.

[00:07:14] Or if they have a team, like, what their team is used to using. So I, I do agree with that. But if they're, they don't have something set up or they do want to move to something different, I actually used FG Funnels myself, which is a white labeled version of High Level. So it's built on the High Level platform, but with their own training and different templates and different things.

[00:07:36] So I've been using that since 2020, so it's been quite a long time, and I'm certified in High Level, and I love it. Just like any software, there's always pros and cons. That's just the case with each. But what I really like about FG Funnels or even High Level, 'cause I've worked obviously in both and other versions of High Level out there that clients have, is the fact that you can start with very basic automation, and you can go very advanced.

[00:08:01] So it's nice because then you can set up your summit the way it suits you. And if you want to just do the basics of running it. Or if you want to take a look later on if you run a couple, whatever, you wanna start to incorporate more automation into it to make things even easier for you or your team and making sure that everyone has a good experience, like, whether they're a speaker or an attendee.

[00:08:23] And so, that's what I would recommend if someone's thinking of moving to a different software anyways that they might be thinking for their summit or it's because you can use it for much more than that as well.

[00:08:36] **Krista:** Yeah, I've heard so much about that platform recently. I've never poked on it, in it myself, but it seems like it kind of has everything you need built right in, which can sim...

[00:08:44] I mean, that's simplifying right there, is, you know, not having to use a whole bunch of different platforms. So okay, thank you for sharing that. So let's rewind. One of the mistakes you pointed out was people just not really having a strategy for their automations, and I would guess most people never even considered that, that they should make a strategy for their automations.

[00:09:02] So let's kind of talk about that pre-planning, strategizing piece of things. Like, what does figuring this out, maybe mapping out some systems and stuff in advance, look like? And at what point in their summit planning process should they be doing that?

[00:09:18] **Elizabeth Neumann:** Okay. So I would definitely say to start doing this mapping as soon as they have their plan itself in place, like they're knowing, like how many days the summit is, how many speakers, and the dates that they're gonna have it.

[00:09:33] Because then with some of that information that would be foundational to then know to do the strategy. And when I'm saying like the automation strategy, it's mapping out... And sometimes people write it down, sometimes you put it in a Google Doc. You can use some of these more like, automated planning software like Miro or even Canva.

[00:09:53] So it just kind of depends. Everyone's a little different, so I just say whatever works for you because some people like to see it visually laid out, others like to just write it out. So the important thing is being able to look at all the different funnel pages you need. So you'll need like your registration page, for example, for the summit.

[00:10:07] You'll want like a page for your VIP pass, and then speaker pages, and there's more. So that idea would be number one. The second part is what emails are you gonna be sending out? You're probably gonna be sending out emails to promote your summit. You're gonna be sending out emails for people who have registered for your summit and what they need to get right away and throughout the summit.

[00:10:27] You're also gonna have other emails depending on what happens right after the summit, if you're offering something else or what the next steps are, whether they've attended or not. So there's like a lot of different emails that should be laid out, 'cause then it makes it easier for you to look and say, "Okay, I need 10 emails for this, I need two emails for that," whatever it may be, and you're able to prepare them ahead of time and know which ones you need first in the process. And also, I would say to look at speaker management as well, because that's a whole, like, almost like a planning in and itself.

[00:11:00] And what I mean by that is what you need to do to outreach or connect with the speakers you're gonna have, and the different parts that are required once they've agreed to be a speaker and you've approved them. What do, what emails do they need to get? Like, what do you need from them? Like, what kind of forms do you want? Are you gonna create a funnel page? Like, it's not necessarily a funnel, but it's more like a page that you can do in your funnel software to share information with your speakers, or are you just gonna put it in a Google Drive? These are all things that you need links for, and just prepare ahead of time to be able to have it all ready, and know, again, having that plan in place so you're not caught off guard, that it's two days before the summit and then you realize you needed something from your speakers.

[00:11:42] Or the speakers keep asking a lot of the same questions, and so it's a lot easier to just direct them to a page or a Google folder, whatever it is that you can have that information. And then also you wanna take a look at who is doing what. If you have a team, like what, who, which of your team members are doing the emails or the pages or the speaker management, or if you're doing it all, just to know that all the pieces that need to be done.

[00:12:07] The other part that people, I find, skip out a lot on, and I definitely talk about this too a lot, is to test everything and test the different scenarios of someone registering for your summit, not buying the VIP pass, someone else registering the summit and buying your VIP pass. What is their journey going throughout?

[00:12:27] And so it's interesting that a lot of people don't test these because then all of a sudden their summit's live and something's happening. And so it's good to have a list of what needs to be tested and, again, who's gonna be doing that testing. I know it's, like, taking some time and it's taking that step back, but it helps to prevent issues later.

[00:12:45] And a lot of times when people have tech issues and they don't like tech and different tech things are happening, most of the time it is something

that the person actually missed doing or didn't test. Not all the time. Sometimes it is just the software, there's a glitch or something happens, for sure. But that is the case, that can happen.

[00:13:02] And then, lastly, look at, like, what's happening each day, how many days, because then it helps you understand what countdown timers you wanna be setting up on different pages and where these different pages need to redirect. And so that is part of the mapping, and it'll be so much easier once you have that to just say, "Okay, step one, I'm working on this."

[00:13:22] Step two is this. Step three..." And you go through it, and then you can be even having, like, a checklist if you want to check it off. And then this can also include what's coming after the summit, whether sometimes people are selling into their membership or they're now doing a challenge or a masterclass or anything like that.

[00:13:40] And so it's just having that idea and that plan at least, knowing that that's coming and being able to focus on the summit, having those pieces in place, too. And so that is part of what is needed to map the systems in advance and have that strategy and plan in place.

[00:13:56] **Krista:** Mm-hmm. I see, like, there's so much foresight involved in that, right? Like, uh, having a full understanding- Yeah ... of what you're doing before you're doing it, and thinking through it. And I've definitely been a part of summits before where you can tell, they, they send you the pitch, but they are not ready for what comes after that, you know, as a speaker. Mm-hmm.

[00:14:13] **Elizabeth Neumann:** Yes.

[00:14:13] **Krista:** And like, "Okay, is there an agreement for me to sign?"

[00:14:15] They're like, "Uh, d- do you have a recommendation?" Oh my goodness. So you def- like, from a speaker's standpoint, when you mentioned testing, that's another one that really hits home for me. It's kind of been the bane of my team's existence for the last couple summits of ours, and I've, I've seen that exact thing with so many people where they open registration, "Oh my gosh, it's not working."

[00:14:34] I'm like, "Well, did you try it first?" You know? Mm-hmm. So, yes, those things are so important. And I feel like I can already see it, but just in case others can't visualize it, like, what does it look like? What does a, a well mapped out tech system look like versus one that's just been kind of, like, duct taped

and, and thrown together as they went through the process and they're like, "Oh, darn, I need this," and kinda, you know, did that "oh, darn, need this," and then did that. Like, what's the difference when you're actually in the middle of it?

[00:15:02] **Elizabeth Neumann:** Yeah, so we did t-touch upon it a little bit. So it's more just keeping things as automated as possible because you've built the plan out, and you've been able to have the time and mental space to create the pieces.

[00:15:12] And so that way, you're not, throughout the summit, suddenly realizing that something's missing, like you were saying, and being able to just know that it's done. I just find it's also, like, the mental overwhelm that can be quite common when, during the summit, you want to be focusing on other things that are needed, not the automation.

[00:15:30] Because the ideal is to have the automation all set up so that you can just be trusting because you've tested it, that it's all working behind the scenes. Now, I always encourage even when you test it just to keep an eye on things, of course, making sure the workflows are still working, and just kind of taking a quick look throughout because that's just part of, like, tech and automation.

[00:15:50] But then that way you're also knowing that your audience that is coming, either as someone who has attended the summit or they're considering it and they just haven't signed up yet, and they're getting the emails, you want to make sure they're getting the right experience. And you want to... By mapping it out and having it all ready, this is what helps avoid the wrong emails going out to the wrong people.

[00:16:12] It happens, like, we all make mistakes. But this is all about, like, minimizing those mistakes. And then you know that they're being taken care of, and especially, like, your speakers, that they're being taken care of. They know what's needs to happen. It's makes it easier for you to know what you need to follow up with.

[00:16:28] If there's, like, two different forms you have them fill out for whatever reason, and so you're, you're keeping track of, like, now that the speaker still needs their second form, so you're able to follow up with them in time and give them the time they need to complete that. So it's just being able to know that things are automated, taking away the mental focus on that part, and just having the best experience possible for everyone involved because it's for you and your team as well.

[00:16:54] **Krista:** Absolutely. That can make such a huge difference. And the cool thing about it is, like, yep, it takes a little time to set up the first time. Mm-hmm. But then you really get to just enjoy it for the next summit. So there's probably some things you're gonna have to tweak, like point it to this form instead of that one, you know, the new updated email sequence, whatever.

[00:17:12] But, like, the bones are there, and it's... man, so much easier and so worth it. And I guess when we're looking at the time investment involved, if a summit host, maybe they're listening to this, they're already in the middle of summit planning or whatever, they only have time to set up a couple automations before their event, what ones would you say will give them the most relief?

[00:17:34] **Elizabeth Neumann:** So I would say that the first one is having their funnel pages, like meaning their registration page, their confirmation page, their VIP pass, upsell page, and, like, the different speaker hub page, which is, like, the main page or other speaker pages. Those to be all done, and the automated part is making sure they're integrating, connecting with each other, and that they're all going in the right direction of what needs to happen.

[00:17:59] So that would be, like, a basic automation, automated system that needs to be set up. And so again, the best thing to do is do it as a-ahead of time as possible. And then related to that would be the different email sequences or if you're just scheduling out broadcasts to have all of those set up and scheduled ahead of time, or set up in a way so that when someone registers for the summit, they're getting their confirmation email, they're getting their information, and that they're getting all the right links.

[00:18:25] 'Cause that's another thing too when I was talking about testing, one of the things I always do is look at the emails and test the actual emails and make sure that the links work. Because, I could see that the email's there, but I send it to myself, and then it gives me an i-a chance to take a look on it on my phone, on my desktop, and being able to see, okay, it's looking good, it's formatting, and there's...

[00:18:46] it's not like there's extra spaces in there or there's a part missing or who knows, and that the links all work, and it all kind of makes sense. So again, that's part of testing. But just I thought I'd mention that as we're talking about that 'cause I didn't specify about the email links 'cause that's something that we all have seen.

[00:19:01] And then about one other thing I would say is to make sure those countdown timers are done all correctly too, and they are set up. Because if you have the countdown timers on the pages, then when that countdown timer ends, it... you can set it up so it redirects to another page. So you're not having to do that in the middle, or people are coming to the page, and it's an old page that you said wasn't available anymore or whatever may be the case.

[00:19:28] So that would be one definitely, that you can incorporate as, like, for the countdown timers. Now, I know that you usually recommend having, like, a summit hub, like, main page, and then from there people can go to day one, day two, day three or whatever, how many days they have. And then from there they're able to go to the individual speaker pages.

[00:19:46] So again, that's where you wanna have on the individual speaker pages having the correct countdown timers so that it goes to the expired page, as an example. And then another one that I would say it would be kind of fourth on the list, would be to have, like, trigger links set up on the links in the emails.

[00:20:06] It's always nice if you can do that, so that you can see if people are clicking from the emails to go purchase, for example, the VIP pass, and they haven't purchased yet. So you wanna make sure you have all your tags in place as well, or lists. It depends on the software you're using. Usually it's tags, but I know there's other wording around that sometimes.

[00:20:25] And so what the trigger link could do is you're sending out emails to those who have registered, and you're encouraging them to purchase the VIP pass. And if they click, they haven't purchased it, but then you can now know that they were interested, so you can now send them a couple extra emails just to those people, and that gives you a little bit of segmentation, because they're so close to buying and they just haven't, so it's just kind of giving them that reminder.

[00:20:46] But if you don't set up the trigger links to have that little automation set up, you won't know that they were the ones clicking over as easily, and so it doesn't give you the chance to kind of encourage them to remember the VIP pass and how important it is to purchase it for their experience of the summit.

[00:21:02] So those are... I mean, there's many more, but those would be, like, the ones I would say are the most important ones to look at and have set up just to make it a lot easier for you and everyone else involved.

[00:21:13] **Krista:** For sure. And it has such a big part to play in the attendee experience as well, and that has a big part to play in literally everything else that you care about for your summit.

[00:21:21] Yeah, so important. Thank you for breaking those down. And I feel like we have given everyone enough to think of or think about at this point. So we are gonna call it here, but I know there are gonna be some people who want more information, like, "Okay, I wanna dive deeper. What exactly do you mean by this?"

[00:21:40] Where else could I automate in my business?" And I know you have resources, free and paid and done for you, like you know, everything someone would possibly need. So tell us what the best next steps would be for someone who wants to dive deeper into automations or learn more about your offers, all that good stuff.

[00:21:56] **Elizabeth Neumann:** Yeah, for sure. Still I do have, like, a custom GPT that I've set up called Find Your Hidden Automations. And so that can be something that, if anyone wants to click into that and be able to then get, like, a personalized report using the custom GPT, answering some questions in there, and then being able to see what other automations can be done in their business that's more specific to their business.

[00:22:19] My offers, it's always great to come and connect with me on LinkedIn or Facebook, and so feel free to send me a DM and we can talk in there. And if anyone's interested in having me set up their summit automation, and take a look at all of that and make sure all the pieces are in place, you can definitely book a free consult, and we can go into more detail what it is that you're looking for.

[00:22:41] I also have some links if anyone has been considering FG Funnels or High Level and want to look into that a little deeper and see if that's something that can work for your business. Because as we were talking in the beginning, you can do a summit... you can do funnel pages, which includes summit, a lot of automations, your calendar, texting, and the list goes on and on and on.

[00:23:03] So, there's a lot that can be done in there. Not to say you need to use all of it, but just nice to have all those options there. There's some links that will be, I'm sure, in the show notes of mine that you can take a look. And feel free to also DM me or send an email and be able to just ask me questions, even if you have questions about that and how you could use it for your summit and whatever else that you have questions around automations.

[00:23:26] **Krista:** Love it. Thank you so much. Okay, we will link to definitely the custom GPT. We'll link to Elizabeth's website. We will include her affiliate link to go High Level, FG Funnels, if you wanna check those out. And... yeah, thank you so much for being here, Elizabeth. And everyone, for those show notes and links I mentioned, head to the link in this episode description wherever you're listening, and we will have it all for you there.

[00:23:47] And now go out and take action to plan, strategize, and launch your high-converting virtual summit.