THE STEPS >> Creating an Engaging Challenge

- Step 1: Plan your purpose and goal.
- Step 2: Plan the type of challenge.
- Step 3: Decide on the content of your challenge.
- Step 4: Name your challenge.
- Step 5: Plan the format, delivery, and platforms of your challenge.
- Step 6: Plan your audience experience.
- Step 7: Develop the challenge content and design.
- Step 8: Plan the promotion of your challenge.
- Step 9: Decide how to maintain and manage your challenge.
- Step 10: Plan how to utilize the challenge after the initial run.

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STEP 1 >> Plan Your Purpose and Goals

What is your brand statement?

Explain who you serve, why you care, what you provide, and what makes you different from other people in your industry.

Answer this for your brand overall, not just in the context of this challenge.

Who are you creating this challenge for? Which part of your audience does this apply to? Are you trying to reach a new audience?

List three tangible or intangible benefits your audience will receive from participating in this challenge (in the box on the left), and then list a main goal you have for your audience (that can possibly be used as a tagline for this challenge) on the right.
STEP 1  > Plan Your Purpose and Goals

What are your goals for your brand during the challenge?

Try to pick one main goal and one secondary goal. Your main goal will help focus your decision making through the process of creating this challenge.

- build brand awareness
- monetize your content through affiliates
- direct people toward a certain service or product
- increase brand/blog traffic
- show how solid your content is
- monetize your content as a community challenge
- create a high-value incentive for email list signups

Other goals:

Now, set some measurable goals for your challenge. List two important goals and one you’d really like to make happen for your brand:

A measurable goal is one that can be verified at the end of the challenge. Talk in terms of actual numbers (% or real) and actual events or milestones.

Three measurable brand goals or milestones during the challenge:
Another question to ask yourself during this planning process is: Is this challenge appropriate for a collaboration? If so, would a collaboration make your brand goal or audience goal more attainable?

Once you’ve identified why you’re doing what you’re doing, it’s easier to tell whether or not another brand can add to it (with their potential reach, areas of expertise, time, design skills, etc.). You’ll also be able to determine if adding another brand or two will be spreading the audience too thin or perhaps even taking away from the challenge/community. Do you think this challenge will be appropriate as a collaboration? If so, list some potential collaborators along with the information below.

<table>
<thead>
<tr>
<th>Potential Collaborator</th>
<th>Added Benefit to Your Brand</th>
<th>Added Benefit to Their Brand</th>
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</table>
| #EpicAtHome: Creating an Engaging Challenge
STEP 2 >> Plan the Type of Challenge

Habit-forming challenges (typically spread over a specific timeline)
Ex: 14 Days to Yoga (for newbies who’ve never done yoga)

Habit-changing challenges (usually done over a specific number of days/weeks)
Ex: The 6-Week Sugar Elimination Challenge

Cleanses (which can really fit in as one of the above challenges)
Ex: 30-Day Creative Business Cleanse

Goal-based challenges (with the ideal final result of goal completion)
Ex: #50Workdays: Zero to Blog

Activity-based challenges
Ex: February Photo-a-Day

Knowledge-gaining challenges
Ex: Learn Spanish for Tourists in 3 Weeks

People-based challenges
Ex: The 4-week Date Your Spouse Challenge
Ex: 30-Day Business Cleanse for Freelancers

Fun challenges
Ex: The 30-Day Guide to Getting Flirty in Your Thirties

Awareness challenges
Ex: Live Trash Free for a Week

What are 2 - 3 challenge ideas you could pursue in the next year:
STEP 2  >> Plan the Type of Challenge

What type of challenge makes the most sense based on your brand goals?

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

What type of challenge makes the most sense based on your audience goals?

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

Write a brief description of what you’re thinking for your challenge so far. It’s okay if this changes.
Plan the Content of Your Challenge

Depending on the type of challenge you decide to pursue and design, you might have a lot of content to develop. You might also have just a sentence or simple instruction per day to communicate. Whichever reality is the case, plan your challenge’s content just as you would a course or eBook. To the right is a spreadsheet (create a copy of it here > byregina.com/challenge-spreadsheet) to help you with your challenge content planning. Use this spreadsheet to:

- Type in your challenge outline.
- Record the format of your challenge, in Step 5 of this workbook.
- Record the way you will deliver the content (ex: email, web page, PDF, etc.), also in Step 5.
- Move things around easily or add new content as it comes to you.
- Add notes so you won’t forget important stuff.

With each topic or section (and sub-section) you outline, think of what you’ll be presenting, how your audience learns best, and the amount of time/effort you want to devote to each piece.

Just a quick content planning tip for you:

While you’re brainstorming your content, use index cards, sticky notes, a mind-mapping app (such as SimpleMind+), or something similar that allows you to move pieces around as you plan. This will help you get your ideas out, and into a logical order, before plugging them into your spreadsheet.

#EpicAtHome >> Creating an Engaging Challenge
STEP 4 >> Name Your Challenge

What are three things you want people to feel after they complete your challenge?

___________________________________________
___________________________________________
___________________________________________

What are three problem words or phrases (words that describe a possible lack/need for your audience) that relate to your challenge?

___________________________________________
___________________________________________
___________________________________________

What are three “action words” (words that show action/progress and make people feel good) that relate to your challenge?

___________________________________________
___________________________________________
___________________________________________

Use the phrases, feelings, and words on the left to develop 3 - 5 name options below. Consider adding:

➡ a descriptive word or phrase (so people know what it’s about)
➡ on-brand wording or images (so people know it’s coming from you)
➡ some engaging wording (to draw people in)
➡ some action words (to help people understand what they’ll accomplish/do)
➡ a time frame (that helps people visualize how long this will take)
STEP 4 >> Name Your Challenge

**Internet test:** Does another challenge or product have the same/similar name (and if so, is it in the same niche)? Does the name seem to mean anything negative in another language or slang?

**Official test:** Is your intended challenge/product name, or a deceptively similar name, already registered as a business in your city, state, or country? Make sure this wouldn’t cause confusion or legal trouble, if so.

**Social media test:** If you’ll want your challenge and/or product to have it’s own brand or social media profiles (which is a lot of work), or its own hashtag, are the necessary names available?

**Domain test:** If your challenge will have its own site or its own URL that redirects to a page on your site, is the intended domain name available?

What is your #1 pick for your challenge’s name? Compare it against the tests on the left.

___________________________________________

___________________________________________

What are some unique #hashtag ideas for your challenge?

___________________________________________

___________________________________________

Will you get a custom URL for your challenge? What are your top options?

___________________________________________

___________________________________________

Just a quick naming tip for you:

Don’t forget to get some feedback on your name from others. Try for people in your target audience, but if that’s not possible, ask people you trust. Sometimes a name sounds epic to us, but doesn’t make sense or resonate with others. It’s better to know that now then after you launch your challenge.
STEP 5 >> Plan the Format and Delivery of Your Challenge

Now that you have in mind the types of content you’ll be creating for your challenge, it’s time to decide how you’ll actually deliver the content. Below are some methods to consider.

➡ **Email:** A new daily challenge prompt or some of your materials can be delivered each day/week, or even just once. Your email can also contain other formats such as video files, embedded graphics, or PDF downloads.

➡ **Your Website:** You can include each piece of content on your website. You can release them all at once or spread out over time.

➡ **Challenge Website:** You can create a separate website just for your challenge.

➡ **Social Media Prompt:** You can create an update/graphic on one or more of your social media accounts (or on your blog) to serve the challenge each day/week.

➡ **PDF Download:** You could give/sell the challenge as one PDF download from your site or a separate service (like gumroad.com).

➡ **Audio Download:** Ditto PDF.

➡ **Video Download:** Ditto PDF.

Just a quick format planning tip for you:

Try to always keep in mind not only your audience’s preferences, but also your own time and lifestyle. What makes sense for you? You are definitely able to vary the content formats and delivery methods as long as your audience knows this upfront.

-Time to head back to >> byregina.com/challenge-spreadsheet to finish filling out format + delivery methods for your challenge content. Some common content formats are video of you, video of your screen, video of a product or process, text + images, audio files, graphics + charts, and PDF worksheets or workbooks.
NOTES >> Platforms and Tools

While watching the video lesson on platforms and tools, jot down notes of what you want to research further or use in the areas below.

- Content Creation + Formatting
- Content Delivery + Management
- Audience Experience + Promotion
Types of blogs he/she is likely to read:
___________________________________________

Which magazines does he/she read?
___________________________________________

What would make her/him trust a new source, blog, or brand?
___________________________________________

Which social issues are likely to affect her/him?
___________________________________________

What would make her/him trust a new source, blog, or brand?
___________________________________________

How is he/she most likely to first hear about (or see) your challenge?
___________________________________________

Does he/she use these networks? If so, how often? How does he/she use them?
Pinterest:  
Twitter:  
Google+:  
Facebook:  
LinkedIn:  
Instagram:  
YouTube:  
Other social networks:  
Email:  

On which network above is he/she most likely to share information or advice with friends?
___________________________________________

What would make them share your challenge with others?
___________________________________________

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Now, let’s think about the experience you want to create for your audience. As you watch the video lesson on this, think through the items below and additional ideas presented.

What extras can you add in to make this awesome for your people?

➡ A community: Is there a way to provide a social media community, website forum, or some other community for your audience so that people can interact with each other?
➡ Additional resources: What other pieces of content can you develop to help people throughout the challenge?
➡ Social media chats or hangouts: Can you create some online meetups for people? Some video chats or Q+As?
➡ Encouragement/consultations: Can you offer pep talks, community managers, or one-time consultations for people?
➡ Hashtags: Are there hashtags that people can use to find other challenge participants online?

Are there any other things you can do for your audience? Record your ideas to make this challenge amazing in the box to the right.
Describe each step or experience for one of your challenge participants from the moment they hear of your challenge until after it ends. Try to view this experience from the point of view of the participant as you write. As you plan, think of additional things that will add value, delight, or wow to the experience.

<table>
<thead>
<tr>
<th>The Steps of the Audience Experience</th>
<th>WOW + Value I Can Add</th>
</tr>
</thead>
</table>

#EpicAtHome >> Creating an Engaging Challenge
STEP 7 >> Develop Your Challenge Content

Now it’s time to create your content. Here’s a general checklist for your content and your challenge.

- Verify the selected topics are helpful and useful to your audience.
- Break up your content creation into manageable chunks and attack the one you’re most excited about first.
- Check that all topics in your challenge outline have been completed or removed.
- Verify that all formats and content delivery methods make sense for the topic and for your audience.
- Check for any additional areas to add resources or “goodies” that will add value to your audience.
- Edit and review all content. Get a second pair of eyes or ears on it when possible.
- Upload your challenge to the applicable/desired platform(s).
- Check that all links, downloads, and video/audio files are working before your challenge starts.
- Verify that your challenge is manageable and doable for your audience.
- Review how the challenge flows; make sure your setup will make sense to your users.

Content Creation Tips

- Develop the 2 - 3 sections of your content that you are most excited about.
- Develop 1 section you’re not too excited about.
- Repeat the steps above until all of your content has been created.

Notes
Whereas you don’t need all of these, here are some design elements and items for you to consider developing or having developed for your challenge:

**Branding**
- Logo
- Website
- Icon/Badge

**Social Media**
- Facebook cover photo
- Twitter header photo
- Google+ cover photo
- YouTube channel art
- Instagram template
- Pinterest pin template
- YouTube video covers
- Google+ image template
- Facebook image template
- Twitter image template
- General social media share template
- Tip or quote design

**Documents**
- Layout of worksheets
- Layout of checklists
- Layout of instructions or any other documents

**Promotional Images**
- Sidebar promo image
- Blog post image
- Email header
- Email graphics template
- Mockups of worksheets/workbooks
- Mockups of videos
- Mockups of any other challenge items

**Other Items**
- 
- 
-
Take some time to brainstorm some ideas for promoting your challenge:

- Will you create a trailer/preview video to share?
- Will you email it out to your email list?
- Will you create attractive graphics for each social media platform you are using?
- Will you “mock up” some of the worksheets on an iPad or as an image to increase people’s excitement? (Example to the right.)
- Will you take screenshots of some of the materials to show people what they’ll be getting when they join the challenge?
- Will you create a blog post that explains your challenge?
- Will you encourage other brand owners, authors, or bloggers to participate in and write a review of your challenge?
- Will you go back through your old resources, products, and blog posts to add links to your challenge?
- Will you offer it only through exclusive access or to limited numbers of people?
- Will you include it as a part of a giveaway?
- Will you create a landing page for your challenge? Or will you redirect a custom URL to your site?
- Will your create a custom hashtag? Click-to-tweets?
### Plan the Promotion of Your Challenge

What will you do in each of the platforms below?

<table>
<thead>
<tr>
<th>Platform</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Blog</td>
<td>Instagram</td>
</tr>
<tr>
<td>Email</td>
<td>Google+</td>
</tr>
<tr>
<td>Pinterest</td>
<td>YouTube</td>
</tr>
<tr>
<td>Twitter</td>
<td>LinkedIn</td>
</tr>
<tr>
<td>Facebook</td>
<td></td>
</tr>
</tbody>
</table>
SOCIAL MEDIA CHECKLIST >> Some Items to Consider

Whereas you don’t need all of these, here are some design elements and items for you to consider developing or having developed for your challenge:

Scheduling

○ 1+ tweet per day leading up to challenge
○ 1+ tweet per day during challenge
○ 3+ pins per week before + during challenge
○ 2+ Facebook posts per month before + during challenge
○ 1+ Instagram post per week before + during challenge

Images and Templates

○ Updated cover photos
○ Individual post templates
○ Infographic templates
○ Tips/quotes templates

Hashtags and Tools

○ URL shortening plugin in place
○ Twitter list(s) for challenge
○ G+ Circles of challenge participants and potentials
○ (Genuine + helpful) membership and participation in relevant communities
○ Hashtags developed

Other Items or Notes

○
○
○
○
○
○

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STEP 9 >> Decide How to Maintain and Manage Your Challenge

Will your challenge have a community? What will your level of involvement be? Will you recruit or hire someone to monitor it?

Are there parts of your community, challenge, promotion, or process that you can automate?

Will your challenge have a website or any other platform you need to maintain?

Will you offer support via email? Phone? Social media? None at all?
STEP 10  >> Plan How to Use Your Challenge After the Initial Run

Can your challenge be turned into a paid course? Given away for free to email signups? Exist on your site to drive traffic? Be developed into a product or service? Be shared on social media as tips or content? Record your ideas for the platform/place it can be used in and how you’ll use it after its initial run.