Compliance Leads Preparation Checklist

A simple, traditional readiness guide so you get the right leads, the first time.

Use this document before you request your compliance leads. It keeps your setup clean, your focus sharp, and your first outreach confident.

What this is (and why it matters)

Leads are only valuable when you are ready to act on them. This checklist makes sure you have: 1) watched the training, 2) understood the documents, 3) chosen a niche and location, 4) practiced the tools, and 5) prepared your outreach—before you request your lead package.

Readiness checklist (do these in order)

1) Watch all training

- ☐ Watch the core training end-to-end (no skipping).
- ☐ Watch the upgrade trainings you own (OTO trainings, if applicable).
- ☐ Write down your chosen offer angle and outreach promise in one sentence.

2) Review all documents

- ☐ Read the quick-start / overview documents.
- ☐ Read the niche guidance and examples (if included).
- ☐ Read the outreach examples and templates.
- ☐ Save any important templates to your own folder so you can edit fast.

3) Choose your niche and location

Pick one niche and one location. Start narrow. You can expand later.

- ☐ Choose one niche (dental offices, med spas, law firms, contractors, gyms).
- ☐ Choose one location (city + state, or a defined metro area).
- ☐ Understand your service posture: referral partner handoff.
- ☐ Write your niche + location on a sticky note and keep it visible while you work.

Niche + location worksheet

My niche:	
My location:	
Why this niche fits me:	
What I will offer first:	
My one-sentence outreach angle:	
My next step after a reply:	

4) Get familiar with all tools

Do one dry-run with every tool you have access to. Practice before you go live.

- ☐ Open each tool and confirm it loads correctly.
- ☐ Run one example output in each tool (even if it is a dummy business).
- ☐ Save your favorite prompt outputs (headline, email, report language) for reuse.
- ☐ Decide where you will store your assets (folder names, file naming).

5) Prepare your outreach setup

- ☐ Decide your sending method (email, contact form, DM, etc.).
- ☐ Create a simple tracking sheet (date sent, business, status, next follow-up date).
- ☐ Choose a follow-up cadence (example: Day 0, Day 2, Day 5).
- ☐ Make sure your message tone is neutral, helpful, and cordial. No selling!

How to request your leads

When you are done with the checklist above, request your leads using the support bubble on the member's page.

Lead request template (copy/paste)

I am ready to request my compliance leads.

Niche:
Location:
Lead package requested:
Preferred website types (optional):
Notes / constraints (optional):

I confirm I have watched the training, reviewed the documents, and I'm familiar with the tools.

What happens next

- Support confirms your request details.
- Your lead package is prepared and delivered according to the program's delivery method.
- You begin outreach using your tracking sheet, and follow your cadence.

When your leads arrive

- ☐ Scan the list once for obvious duplicates or out-of-scope items.
- ☐ Pick the first 10 and send your first wave within 24 hours.
- ☐ Log every send (even if it is just a simple spreadsheet).
- ☐ Do not over-edit. Use the templates. Consistency beats perfection.

- ☐ After the first replies, refine your angle, not your entire system.

Common mistakes to avoid

- Requesting leads before choosing a niche and location.
- Trying to work multiple niches at once.
- Waiting until everything feels perfect before sending.
- Writing long, complicated emails. Short, clear, respectful wins.
- Failing to follow up. Most wins happen on follow-up.

Quick readiness score (optional)

Give yourself 1 point for each box you can honestly check. If you score 8 or more, request your leads.

- ☐ I watched all training assigned to me.
- ☐ I reviewed all documents.
- ☐ I chose one niche.
- ☐ I chose one location.
- ☐ I practiced each tool at least once.
- ☐ I have a tracking sheet ready.
- ☐ I have my first outreach message ready.
- ☐ I know my follow-up cadence.
- ☐ I know what I will do when someone replies.
- ☐ I know how to request leads in the support bubble.

Preparedness is quiet power. Do the steps in order, and the work gets simpler every day.