

Membership Site Planning Worksheet

From Information to Transformation: A Blueprint for Your New Community

This worksheet is designed to help you move through the brainstorming and planning phase of your membership site. Use this to clarify your vision, identify your core value, and map out your path to a Minimum Viable Product (MVP).

Part 1: The Transformation Map

Modern memberships sell a "New Reality," not just a "Library of Content." Define the bridge you are building for your members.

The Core Promise

What is the single most important transformation or outcome you are enabling for your members?

(Example: "I help [Audience] achieve [Result] in [Timeframe] without [Frustration].")

Answer: ### The Before and After Shift

Compare their current struggle to the future you are creating for them.

Metric	Their Current Reality (The Struggle)	The NEW Reality (The Transformation)
Possessions	What do they have (or lack) right now?	What do they own or possess after your training?
Actions	What are they doing (or failing to do)?	What are they doing differently now?
Daily Life	What is their average day like today?	What does their "optimized" day look like?
Feelings	How do they feel? (e.g., overwhelmed)	How do they feel now? (e.g., empowered)

Part 2: The Implementation Gap

Members don't want more videos; they want solutions. Identify the barriers between their

current state and their goal, and define how your site solves them.

The Barrier (The Friction Point)	My Solution (Content, Tool, or Feature)
1.	
2.	
3.	
4.	

Part 3: Selecting Your Delivery Engine

How will you deliver the value? Check the boxes that best fit your expertise and your members' needs.

- **Knowledge Base:** On-demand courses, tutorials, or a resource library.
- **High-Touch Support:** Group coaching calls, Q&A sessions, or office hours.
- **Accelerated Learning:** Workshops, intensive classes, or boot camps.
- **Connectivity:** A community forum, Slack/Discord, or networking events.
- **Implementation Tools:** Workbooks, templates, checklists, or software tools.
- **Accountability:** Cohort-based tracks, challenges, or "Done-With-You" sessions.

Part 4: The MVP Roadmap (The Lean Launch)

Your "Ideal Site" is a marathon. Your "Launch Site" is a sprint. What is the smallest version of this that still delivers the promised result?

What are the core features that MUST be active before you accept your first member?

- 1.
- 2.
- 3.

What "secondary" features can be added in Phase 2 or 3?

(Items that are nice to have, but might delay your launch.)

Part 5: Strategy and Sustainability

Defining the mechanics of your offer without getting bogged down in specific price points.

Revenue & Tiering

- **Access Model:** Will this be recurring (monthly/annual), a lifetime one-time fee, or a hybrid "front-end" trial?
- **Value Tiers:** If you plan on having multiple levels (e.g., Basic vs. Pro), what is the "Upgrade Trigger" that makes the higher tier attractive?

Crushing Resistance

What are the top 3 objections that would keep someone from joining today, and how will you counter them?

1. **Objection:** _____ | **Counter:** _____
2. **Objection:** _____ | **Counter:** _____
3. **Objection:** _____ | **Counter:** _____

The Retention Factor

Why will they stay for month 2, month 6, and month 12? What is the ongoing value that justifies a continued relationship?

Notes & Ideas

(Capture your "Lightbulb Moments" here)

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