

CSI'S

VISIBILITY BOOKING SYSTEM™



**Strategically increase your visibility
by appearing as a guest expert
wherever your potential clients are.**



CSICORPORATION.COM



CSI's Event Traffic Generator Toolkit

Your Step-by-Step Framework for Getting Booked on Podcasts, Summits, and Stages

This comprehensive system will help you strategically increase your visibility by appearing as a guest expert where your ideal clients are already gathered. Follow this proven process to land high-value speaking opportunities that drive traffic to your website.

About Carol J. Dunlop



Carol J. Dunlop, The Online WOW! Strategist and 10X Amazon Best Selling author, influential podcast host, and expert summit producer, teaches Purpose Driven Entrepreneurs to convert marketing into money using their WOW! Website, so they can live the lifestyle they want. She heads up the marketing arm of the company she co-founded with her husband, Alvin, over 30 years ago. Carol's clients hail from cities across the U.S.A., the U.K., New Zealand, and Australia. Carol has created 40+ Best Selling authors, launched 9 podcasts, and produced 9 money-making virtual summits. Carol is currently working to promote the Best-Selling books, Influential podcasts, and Expert summits that her clients are creating.

This proprietary toolkit is for exclusive use by **UN-Marketing Academy** members. For full training on implementing these frameworks with video tutorials and additional resources, [join the Academy today.](#)



STRATEGIC POSITIONING

Your Expert Positioning Statement

Match your goals with the ideal event format:

Core Expertise Areas: *List your top 3 areas of expertise:*

1. _____
2. _____
3. _____

Target Audience: *Who specifically benefits from your expertise?*

Unique Perspective: *What makes your approach or viewpoint different?*

Credibility Factors: *List 3-5 factors that establish your authority:*

1. _____
2. _____
3. _____
4. _____
5. _____

Results You Help Achieve: *What specific outcomes do you help create?*



STRATEGIC POSITIONING

Your Expert Positioning Statement

Match your goals with the ideal event format:

Expert Positioning Statement: *Combine the above elements into a clear, concise statement:*

I help _____ (target audience) to
_____ (achieve specific result) through
_____ (your approach/methodology). What makes my
perspective unique is _____ (differentiator). My expertise
is validated by _____ (top credibility factor).

Notes:



STRATEGIC POSITIONING

Signature Talk Development

Talk Title Options: *Create 3-5 compelling, specific titles:*

1. _____
2. _____
3. _____
4. _____
5. _____

Selected Primary Talk: _____

Talk Description: *100-word compelling description of your talk:*

Key Learning Outcomes: *What will the audience learn or be able to do?*

1. _____
2. _____
3. _____
4. _____
5. _____



STRATEGIC POSITIONING

Signature Talk Development

Talk Structure Outline:

Introduction/Hook: _____

Story/Context: _____

Main Point 1: _____

Main Point 2: _____

Main Point 3: _____

Application/Call to Action: _____

Secondary Talk Topics: *Develop 2-3 alternative angles for different audiences:*

1. _____

2. _____

3. _____

Notes:



OPPORTUNITY IDENTIFICATION

Ideal Platform Profile

Platform Types: *Check all that align with your goals:*

- Interview-style podcasts
- Panel discussions
- Virtual summits
- In-person conferences
- Local business groups
- Industry associations
- Webinar guest spots
- Live streams

Other: _____

Audience Alignment: *Define the characteristics of platforms with your ideal audience:*

- Industry focus: _____
- Audience size range: _____
- Engagement level indicators: _____
- Host/organizer type: _____
- Content style: _____



OPPORTUNITY IDENTIFICATION

Ideal Platform Profile

Platform Quality Indicators: *What signals quality opportunities for you?*

Minimum production quality: _____

Promotion requirements: _____

Guest treatment standards: _____

Audience engagement evidence: _____

Notes:



OPPORTUNITY IDENTIFICATION

Opportunity Research Framework

Podcast Research: *Sources for finding relevant podcasts:*

- Apple Podcasts categories
- Spotify podcast charts
- ListenNotes.com search
- PodcastGuests.com
- Competitors' podcast appearances
- Industry-specific podcast listings
- Social media searches
- Your audience survey results

Other: _____

Notes:



OPPORTUNITY IDENTIFICATION

Opportunity Research Framework

Summit/Conference Research: *Sources for finding relevant events:*

- Industry association calendars
- EventBrite/Meetup searches
- ConferenceAlert.com
- Speaker directories
- LinkedIn events
- Facebook events
- Industry publications
- Competitor speaking schedules

Other: _____

Notes:



OPPORTUNITY IDENTIFICATION

Opportunity Research Framework

Opportunity Qualification Checklist: *Assess each opportunity against these criteria:*

- Audience matches my target market
- Platform has consistent publishing/event schedule
- Content quality meets minimum standards
- Host/organizer seems professional
- Promotional practices align with my preferences
- Topic flexibility allows for my expertise
- Timing works with my availability
- Platform reach justifies the time investment
- No red flags in reviews/previous episodes

Notes:



Phase 2 OPPORTUNITY IDENTIFICATION

Opportunity Tracking Template

Platform Name	Type	Audience	Quality Score (1-10)	Research Notes	Decision

Priority Opportunities: *Your top 7 targets to pursue first:*

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____



RELATIONSHIP BUILDING STRATEGY

Pre-Pitch Warming Sequence

Platform Familiarity: *For each priority opportunity, complete these actions:*

- Subscribe to podcast/newsletter/social channels
- Listen to/review 2-3 recent episodes or presentations
- Note common themes, format, and style
- Identify host's/organizer's interests and background
- Research recent guests/speakers

Engagement Strategy: *Implement these actions over 2-4 weeks before pitching:*

- Comment meaningfully on 3-5 social media posts
- Share 2-3 episodes/events with thoughtful commentary
- Subscribe to email list if available
- Respond to any audience questions in comments where you have expertise
- Tag platform/host when sharing content

Notes:



RELATIONSHIP BUILDING STRATEGY

Pre-Pitch Warming Sequence

Connection Development: *Where possible, implement these additional steps:*

- Identify mutual connections
- Request warm introduction if appropriate
- Attend events where host/organizer will be present
- Engage in same online communities
- Reference their work in your content (and notify them)

Notes:



RELATIONSHIP BUILDING STRATEGY

Personalized Outreach Development

Research Worksheet: Complete for each priority opportunity before pitching:

Platform: _____

Host/Organizer: _____

Recent Content Review:

Episodes/events to study: _____

Common themes observed: _____

Guest/speaker patterns: _____

Content gaps I could fill: _____

Host's apparent interests: _____

Personal Connection Points:

Mutual connections: _____

Shared experiences/backgrounds: _____

Content of theirs I genuinely enjoyed: _____

Specific value I noticed in their work: _____

Notes:



RELATIONSHIP BUILDING STRATEGY

Personalized Outreach Development

Customized Value Proposition:

Why their specific audience needs my expertise: _____

How my topic complements their recent content: _____

Unique angle for their platform: _____

Timely reason for this topic now: _____

Notes:



PITCH DEVELOPMENT & EXECUTION

Visibility Media Kit Creation

Professional Bio Versions: *Create three versions of your bio:*

Short Bio (50 words):

Medium Bio (100 words):

Full Bio (200-250 words):



PITCH DEVELOPMENT & EXECUTION

Visibility Media Kit Creation

Professional Headshot:

- High-resolution image (300 dpi minimum)
- Professional, on-brand appearance
- Multiple formats available (jpg, png, transparent background)
- Both close-up and wider framing options

Talk/Interview Topics: *Develop 3-5 potential topics with brief descriptions:*

Topic 1: _____

Description: _____

Key points: _____

Why it matters to the audience: _____

Topic 2: _____

Description: _____

Key points: _____

Why it matters to the audience: _____

(Repeat for additional topics)



PITCH DEVELOPMENT & EXECUTION

Visibility Media Kit Creation

Suggested Interview Questions: *Create 3-5 questions hosts could ask you:*

1. _____
2. _____
3. _____
4. _____
5. _____

Previous Appearances: *List your best 3 previous interviews/talks with links:*

1. _____
2. _____
3. _____

NOTE: *I have a playlist on [my YouTube Channel](#) where my interviews live*

Contact Information:

Email: _____

Phone: _____

Website: _____

Social Media Profiles: _____

Assistant Contact (if applicable): _____



PITCH DEVELOPMENT & EXECUTION

Master Pitch Template Library: *change as needed to reflect YOU*

Podcast Pitch Template:

Subject: [Personalized subject line relevant to their show]

Hi [Host's First Name],

[Personal connection to their show - be specific about episodes/content you've enjoyed]

I'm [your name], [brief credential that establishes relevance]. I help [your audience] to [core transformation you provide], and I believe your listeners would gain valuable insights from a conversation about [proposed topic tailored to their audience].

Specifically, we could explore:

- [Talking point 1 - make this specific and actionable]
- [Talking point 2 - focus on audience value]
- [Talking point 3 - include something slightly unexpected]

[Brief paragraph on why you're qualified to speak on this topic - include specific results or experiences]

I have professional recording equipment and a quiet space for recording. You can hear my interview style on [previous podcast appearance] here: [link].

Would you be interested in exploring this topic together on [Podcast Name]? I'm happy to provide any additional information you might need.

Thanks for your consideration,

[Sign Off]



PITCH DEVELOPMENT & EXECUTION

Master Pitch Template Library: *change as needed to reflect YOU*

Virtual Summit Pitch Template:

Subject: Speaker proposal for [Summit Name]: [Your Topic]

Hi [Organizer's Name],

[Reference to previous summit or their work, if applicable]

I'd like to propose a session for your upcoming [Summit Name] that would provide significant value to your audience of [their target audience].

Session Topic: [Your proposed topic]

In this session, attendees will learn:

- [Key learning outcome 1]
- [Key learning outcome 2]
- [Key learning outcome 3]

This topic aligns with your summit theme of [their theme] and would complement other sessions on [related topics]. It's particularly timely because [reason why this topic matters right now].

About me: I'm [your name], [credential], and I specialize in helping [your audience] achieve [result]. My work has been featured in [relevant publications/platforms], and I recently [recent achievement relevant to topic].

I'm committed to delivering exceptional value to your attendees and promoting the summit to my audience of [your audience size across platforms]. I have experience speaking at events such as [previous speaking engagements] and consistently receive positive feedback on my practical, action-oriented presentation style.

I've attached my speaker one-sheet with additional details. Would you be open to discussing this potential session for your summit?

Thank you for your consideration,

[Sign Off]



PITCH DEVELOPMENT & EXECUTION

Master Pitch Template Library: *change as needed to reflect YOU*

In-Person Speaking Pitch Template:

Subject: Speaking proposal for [Event Name]: [Compelling Topic]

Dear [Name],

[Personalized introduction showing familiarity with their event/organization]

I'd like to propose a presentation for your upcoming [event name] on [date/month] that would provide significant value to your audience of [their audience description].

Presentation Title: [Your compelling talk title]

Description:

[3-4 sentence description of your presentation and the value it provides]

Attendees will walk away with:

- [Specific, actionable takeaway 1]
- [Specific, actionable takeaway 2]
- [Specific, actionable takeaway 3]

This topic aligns with your event theme of [their theme] and would complement your programming because [specific reason]. It addresses the current challenge of [industry challenge] that many in your audience are facing.

About me: I'm [your name], [primary credential]. I've spoken at events including [previous notable speaking engagements] and consistently receive feedback about my [your speaking style/approach]. You can view a sample of my speaking style here: [link to video if available].

I've attached my speaker kit with additional details about my presentation style, technical requirements, and testimonials from previous event organizers.

Would you be available for a brief conversation to discuss how this presentation could best serve your audience?

Thank you for your consideration,

[Sign Off]



PITCH DEVELOPMENT & EXECUTION

Master Pitch Template Library: *change as needed to reflect YOU*

Follow-Up Templates: *Initial Follow-Up Template:*

Subject: Following up: [Original pitch subject]

Hi [Name],

I hope this email finds you well. I wanted to follow up on my previous message regarding [brief pitch reminder].

I understand how busy you must be with [their business/event], so I thought I'd check in case my email was buried in your inbox. I'm still very interested in [speaking/being interviewed] about [topic] for your [platform/event].

Would this be something that might interest you for an upcoming [episode/event]?

Thank you for your consideration,

[Sign Off]

Final Follow-Up Template:

Subject: One final thought re: [their platform/event]

Hi [Name],

I'm reaching out one final time regarding my proposal to [speak/be interviewed] about [topic] for [their platform/event].

Since my last message, I've [new development, achievement, or thought related to your pitch]. This further reinforces how this topic could provide value to your audience.

If the timing or topic isn't quite right, I completely understand. I'll continue to follow and support your work regardless.

All the best,

[Your Name]



OPPORTUNITY MAXIMIZATION

Pre-Appearance Preparation

Content Preparation Checklist:

- Review your notes on the platform and host/organizer
- Prepare stories, examples, and case studies
- Compile relevant statistics and research
- Create concise talking points
- Develop clear, actionable takeaways
- Prepare and practice your introduction
- Craft your call-to-action/resource offer
- Anticipate potential questions
- Practice delivery (time yourself)
- Prepare backup examples if time allows

Notes:



OPPORTUNITY MAXIMIZATION

Pre-Appearance Preparation

Technical Preparation Checklist:

- Test all equipment
- Arrange/setup professional background/setting
- Prepare backup technology options
- Confirm all connection details
- Schedule buffer time before and after
- Prepare water and voice care items
- Eliminate potential interruptions (quiet and undisturbable area)
- Have notes accessible but not visible
- Wear appropriate, on-brand attire
- Do a final tech check 30 minutes before

Notes:



OPPORTUNITY MAXIMIZATION

Pre-Appearance Preparation

Lead Generation Preparation:

- Create appearance-specific landing page
- Develop special offer/lead magnet for listeners
- Set up tracking for this traffic source
- Prepare follow-up email sequence
- Test all links and forms
- Create custom welcome for new subscribers
- Brief team on handling new inquiries
- Prepare social media assets for sharing

Notes:



OPPORTUNITY MAXIMIZATION

Appearance Execution Excellence

Delivery Best Practices:

- Keep answers concise (2-3 minutes maximum)
- Use the “headline first” approach (main point, then details)
- Include specific stories and examples
- Refer to host by name occasionally
- Echo questions before answering when appropriate
- Maintain energy throughout
- Speak in terms of audience benefit
- Use “you” language rather than “I” language
- End with actionable takeaways
- Deliver your call-to-action confidently and clearly

Notes:



OPPORTUNITY MAXIMIZATION

Appearance Execution Excellence

Common Pitfalls to Avoid:

- Rambling or going off-topic
- Using jargon or unexplained terminology
- Mentioning resources without explaining them
- Overwhelming with too much information
- Speaking too generally without specifics
- Being promotional too early
- Neglecting to translate concepts for beginners
- Poor audio/video quality
- Poor lighting
- Background distractions
- Checking time or appearing distracted

Call-to-Action Framework: “I’d love to continue this conversation and provide additional support. I’ve created a free resource specifically for [host]’s audience called [resource name]. It gives you [specific benefit] and helps you [desired outcome]. You can get immediate access at [simple URL]. I’ve also included [bonus element] to help you implement what we discussed today.”



OPPORTUNITY MAXIMIZATION

Post-Appearence Maximization

Immediate Follow-Up Actions:

- Send thank you email to host/organizer
- Provide any promised resources or links
- Note any specific moments/quotes for later promotion
- Ask about expected publication date (for recorded content)
- Offer additional support as needed

Promotion Strategy:

- Share across all your platforms when published
- Create quote graphics from key moments
- Write blog post expanding on topic discussed
- Email your list with link and additional insights
- Create short video teaser for social media
- Tag host/organizer in all promotion
- Engage with audience comments and questions
- Pin to profile on relevant platforms
- Add to media page on your website
- Repurpose content into additional formats



OPPORTUNITY MAXIMIZATION

Post-Appearance Maximization

Relationship Nurturing:

- Set calendar reminder to check in with host 30-60 days later
- Share host/organizer content periodically
- Connect on additional social platforms
- Introduce to relevant contacts when appropriate
- Suggest potential future collaborations
- Offer testimonial about your experience
- Refer quality guests to them if appropriate

ROI Tracking:

- Track website traffic from appearance
- Monitor leads generated
- Note conversion rates from this source
- Calculate time investment vs. return
- Document lessons learned
- Identify improvement opportunities
- Determine if platform is worth revisiting



VISIBILITY MOMENTUM SYSTEM

Opportunity Chain Strategy

From Each Appearance, Identify:

- 2-3 people mentioned whom you should connect with
- Complementary platforms/events to research
- New topic ideas generated during conversation
- Audience questions that could become future content
- Potential collaborative partners mentioned

Guest-to-Host Transition Plan:

- Develop reciprocal opportunities where appropriate
- Create platform profiles for hosts you'd like to feature
- Design interview series featuring previous hosts
- Establish criteria for guests on your platform
- Create standardized guest invitation templates



OPPORTUNITY IDENTIFICATION

90-Day Visibility Calendar

Week	Outreach Goal	Relationship Building	Appearances	Content Creation	Follow-Up Actions
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					



VISIBILITY MOMENTUM SYSTEM

Visibility Metrics Dashboard

Monthly Metrics: *use this as a template for each month*

- Pitches sent: _____
- Positive responses: _____
- Appearances completed: _____
- Estimated audience reached: _____
- Website visitors from appearances: _____
- New email subscribers: _____
- Direct inquiries attributed: _____
- Revenue attributed: _____
- Time invested: _____
- ROI: _____

Quarterly Analysis:

- Most effective platform types: _____
- Highest converting topics: _____
- Most valuable relationships developed: _____
- Areas for improvement: _____
- Strategic adjustments for next quarter: _____

Bonus TOP VISIBILITY ACCELERATORS

Strategic Networking Accelerator

- Identify 10 “dream connection” individuals who host or influence your target platforms
- Create relationship development plans for each
- Focus on providing value first through:
 - Thoughtful content engagement
 - Resource sharing
 - Audience referrals
 - Genuine support of their initiatives
- Document all interactions and follow-up accordingly

Streamlined Production System

- Create templates for all common communication elements
- Develop standard preparation processes
- Build content repurposing workflows
- Establish team roles for visibility support
- Create standard operating procedures for each appearance type

Authority Amplification Framework

- Identify speaking credentials to pursue strategically
- Create system for collecting and showcasing testimonials
- Develop thought leadership content calendar
- Establish media mention tracking and highlighting
- Create visibility achievements timeline



Final Words

WHAT'S NEXT?

No matter what event you've planned and executed. This workbook gives you EVERYTHING you need to create a successful and profitable follow up strategy.

Ready to get feedback on any of your events and network with like-minded Purpose Driven Entrepreneurs in a safe space?

[Discover more about joining a community](#) that has your best results in mind.

