



04

DM Setting Playbook

Warm only. Profile, inbox, openers, the call transition, follow-ups, objections, reactivation, and the volume math.

DM SETTING PLAYBOOK

A lead is just a person that you can contact. All of your followers, engaged viewers, story-poll voters, and commenters... are leads. You are missing out on untapped potential, people just waiting to be coached by you.

Instagram DMs allow you the opportunity for personalized communication that isn't possible with mass marketing strategies. You can facilitate conversations that build trust and address specific pain points. This builds a level of trust that begins the coach-client relationship.

Every DM in this kit goes to someone warm. No cold DMs. Now, how do we get started...?

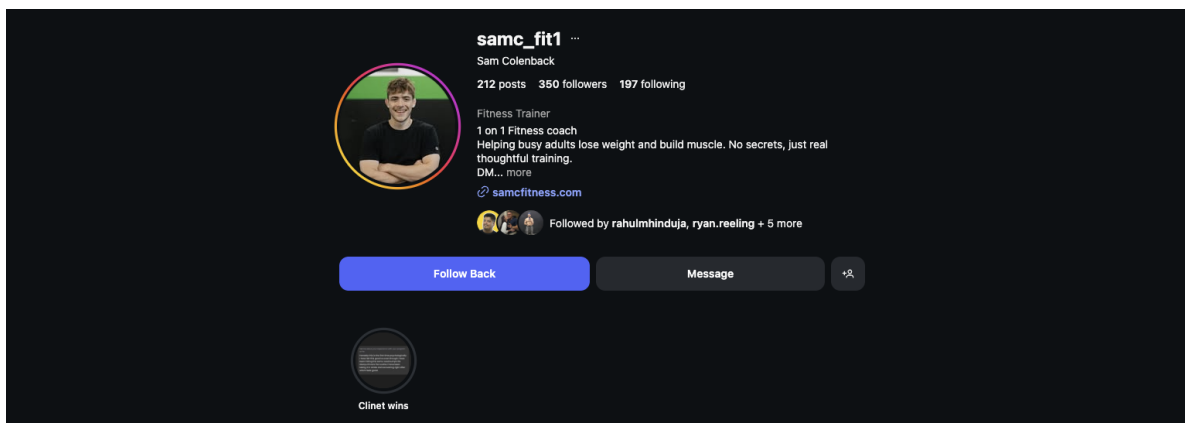
● Real world case study

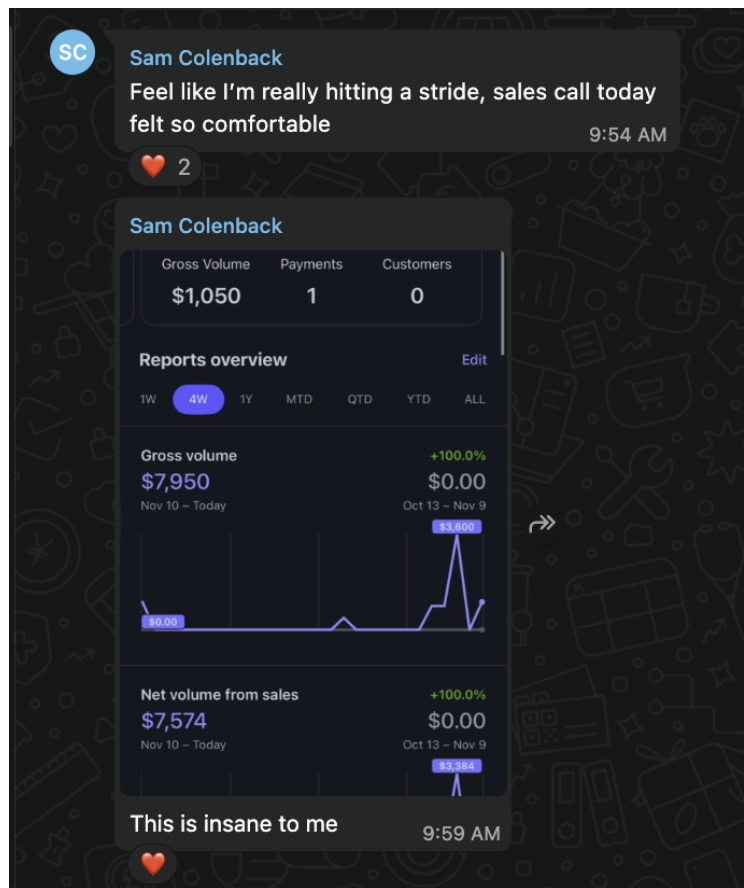
Automatically, I know there are a few of you who are saying to yourselves right now:

"Oh this won't work for me" "I just don't have enough followers"

Well, meet Sam. He had a little under 400 followers at the time of the screenshot below. Didn't stop him from closing ~8k in cash from happy clients in **just one week**.

No paid ads. No "cold DMs." Just firing off the same warm-DM strategies I will talk about in this playbook.





FOUNDATIONS & DEFINITIONS

● What a “lead” actually is

A lead = anyone you can contact who fits your ICP and has shown **any** level of interest (follower, liker, commenter, story voter, inbound DM, old contact, friends, family, etc.)

Goal of DMs = move people from attention → conversation → call → client

● Warm leads

A warm lead has had touchpoints with you. Much more likely to respond. A touchpoint simply refers to the interactions they have had with you. Every like, comment, follow, email, SMS is a touchpoint. The higher the amount of touchpoints, the greater the likelihood that they purchase from you.

● Core terms you’ll see in this playbook

- **Tangible:** something they want but don’t have yet (lose 20 lbs, fit in medium shirts, bench 225, etc.).

- **Experience:** evidence from their life that proves they don't have that tangible yet (yo-yo dieting, past coaching, failed attempts).
- **Intent Stage:** the stage of DMs where we get the tangible and past experience.
- **Past Experience Question:** what they've tried, what they've seen, what hasn't worked.
- **Logical Certainty:** the stage where we build awareness that their current approach isn't working, without being a dick about it. This is also the stage where we determine if they like what they are currently doing or not.

These are the same stages you'll run on the call (see the *Sales Call Script*). The DMs get it started, the call finishes it.

● **Non-negotiable rules of DM setting**

- You are not here to beg. You're here to understand and qualify. That's literally it.
- You do not coach for free in DMs. Questions → better questions.
- You sound like a human, not a LinkedIn sales rep.
- The goal of DMs is clarity + qualification → call, not making a sale in chat.
- Every convo is tracked.

STEP 1: OPTIMIZE YOUR IG PROFILE

Before you send a singular DM... yes, I mean singular. You must make sure that your Instagram profile is optimized, as it is your first impression.

When a potential client receives your message and checks your profile, we want them to trust us and understand that **you** are a legitimate fitness coach who can help them. I see a lot of folks complain about getting poor response rates, and immediately they start to question their opening DMs, etc.

I take one look at their page and see the problem:

It's shit.

It isn't optimized for anyone to show interest in their coaching. Here's what you will do to make sure you aren't that guy... and if you are that guy/gal, well, the truth hurts, but it helps.

- **Switch to a professional account:** In your Instagram settings, switch to a professional account (choose **Creator**) if you haven't already. Selecting a business account restricts the audios that your account may use, hence why I encourage coaches to use Creator. (If it is a page delegated to only your brand, i.e. a physical gym location, use a business account.)
- **Make sure you have a clear profile picture and name:** Use a nice profile photo (I cannot believe this has to be said, but you would not believe the profile pics I see creators come to me with) and use your actual name as your "Name." For example: Jack Pacella | Dad's Fitness Coach.
- **Bio that speaks to your niche:** As much as I hate the obsession with niching down... it is true. If you try to speak to everyone, you will speak to no one. In your bio, you must communicate who you help and how you intend to help them. You must also have a **CLEAR and CONCISE call-to-action**. Do NOT confuse your viewer with many IG bio links, linktrees, or other jargon. Keep it simple.
- **Example bio:** Helping post-partum moms lose x in y time without xyz struggle. / 100+ moms rejuvenated / DM "Hi" for a FREE post-partum fitness guide
- **Link and call-to-action:** Include a **SINGULAR** link in your IG bio as a CTA to book a call, a website, or a free resource.
- **Story highlights and content:** Create a few IG story highlights on your profile showcasing client transformations, results, testimonials, your training style, or FAQs. For example: a "Results" highlight with before and after side-by-side pics. Keep the message concise and cohesive. The intent is to get the person to believe that you can help them with their specific problem.
- **Last and final step:** Your bio doesn't sell, YOU do. People can talk about bios and highlights all they want, but ultimately, it is your content that is responsible for creating that curiosity gap and nurturing those prospective clients to get them to reach out to you. So if your content is **ONLY** top of the funnel (meaning it is only short, minimal educational/coaching value, minimal marketing), **you won't get anyone interested** in your service. If your content is **only** middle of funnel... **you will not successfully bring in new viewers...** and if your content is **only** bottom of funnel... well... **you'll probably just be on everyone's block list** (where you deserve to be for spamming "buy my coaching" so many times).

SYSTEMS SETUP: CALENDAR, CALENDLY, MANYCHAT

- Set up your Google Calendar and integrate Calendly.
- Reducing no-shows with automations in Calendly.
- Integrate ManyChat → Instagram.

Calendly is a software that allows you to send appointment links to a prospect, and they may pick an available timeslot on your schedule that works within their time constraints. Set your call length to 45–60 minutes. It's one call, and you close on it.

If you are confused about how to do any of these steps, ask ChatGPT. Calendly, ManyChat, and Instagram all have help pages that teach you more about the specific platforms.

SETTING UP YOUR IG DM INBOX FOR SUCCESS

The perks of having a professional account are that you can mark messages with a clear label to indicate what stage the lead is in.

Move ALL leads and active convos related to sales into the **Primary Inbox**, move all others to **General**. The General Inbox will host conversations with friends, peers, and anyone who wouldn't be a good candidate for your program.

Adding labels to a chat:

Method 1:

1. Go to your Instagram chat list.
2. Open a chat.
3. Tap the label icon at the top of the chat.
4. Select your desired label: Lead, Booked, Ordered, Paid, or Shipped.
5. Tap Save.

Method 2:

1. Swipe left on a chat.
2. Select More.
3. Tap Add label.

To change a label:

1. Swipe left on a chat.
2. Select More.
3. Tap Edit label.

Label instructions:

- **Lead:** Mark any convo that needs to be engaged/conversed with.
- **Ordered:** Mark when calendar links have been sent.
- **Booked:** Mark when a prospect books a call.
- **Paid:** Mark when paid/closed.
- **DQs (Disqualified):** Mark flagged and moved to General. Represents a lost opportunity, no longer in your pipeline.
- **Follow-Ups (Shipped):** Use the "Shipped" label to tag people with whom you have follow-up calls.

WHO TO MESSAGE

Now that your profile is set up, you can delve into the next stage: finding people to message. Every one of them is warm.

● Tracking metrics to build a pipeline

To design your DM strategy and gauge content performance, tally up your numbers for 7 days and find the daily average of:

- # of new followers
- # of comments per video
- # of likes per video

● Sources of leads

Important note: Prioritize the quickest route to cash collected. If you have someone who is on the cusp of buying or is a hot lead, prioritize them **FIRST**. Do not start new outreach if you are going back and forth with a hot lead.

- **Existing contacts:** If you have family, friends, peers, old high-school Facebook friends: **THESE ARE THE WARMEST LEADS OF ALL.**
- Put together a list of everyone that you know and write down their name and contact information.
- Tier 1: this is your main play. Use the launch message below.
- **Inbound leads:** These leads are warmer than steam. Prioritize these messages first, as someone has actively expressed interest in your coaching services. You can be a little bit more direct. (*Note: beware of people pitching you on DM setting services. Don't take them up on this.*) Use the setting framework in **Starting the Convo.**
- **Story-viewers and engagers:** One of the best ways to get in someone's DMs is via IG stories. When someone votes on a poll or types up a question to a Q&A you posted, this is the perfect opportunity to DM them.
- **Poll guidelines:** be on brand, probe curiosity, and have a max of 3 options (avoid overwhelm).
- **Example poll:** “What are you struggling with most rn?? Just curious...” Options: “I can't stay consistent,” or “I don't have a plan to follow.” This poll gets a specific response, asks a question, and opens up the opportunity to later DM these poll voters.
- **New followers:** Keep your eyes peeled for who follows you, especially if they fit your ideal client profile. When you get a new follower that looks like a potential client, welcome them into the herd. Shoot them an **opener** message.
- **Post-engagers:** Check who is liking and commenting on your posts. If someone regularly drops a like or comment and they fit your target demographic, they're warm. You can engage back on their content and strike up a convo in the DMs with an opener.
- **Past leads and past clients:** see **Reactivation** below.

● Tier 1: the launch message

If you're just starting out, you don't have a business yet. Your main priority is the connections and relationships you already have, and how you launch to them. Send it as a text or a DM:

"Hey [name]! I'm actually starting up this new thing. I'm helping people [get X outcome] in [this many days] without [negative thing], so that they can [pleasurable thing]. Right now I'm only opening it up to 5 people at a discounted rate. It's going to launch at [\$X], but I'm keeping it at [\$Y] just for the first 5 people who work with me. Would you be interested, or would you like to hear more?"

Done. Fill in the brackets from your Offer & Avatar Worksheet. The 5 spots are real: once they're gone, the price goes to launch price.

- For close friends and family, open with it. For people you haven't talked to in a while, catch up first, then send it.
- If they want to hear more, run the Intent and Logical Certainty questions below, then transition to the call.
- If they're not the person, ask who they know: "Real quick, who do you know that's been talking about wanting to get in shape? Even just one name."
- Don't blast the family group chat or copy-paste the same message to 50 people. They talk to each other.

● Tier 3: referrals and upsells

If you have a real audience, your best leads are already in your business. Ask your happy clients who they know. Ask yourself what you can do to get current clients to the next stage, the next level, and offer it. Put a setter on the warm DMs so you're not the one sending them.

USING CONTENT TO INVITE DMS

Let your content do the talking...

- **Transformation/testimonial CTA:** Post a transformation pic or client testimonial and say, “DM me ‘TRANSFORM’ and I’ll share the 3-step plan [Client Name] used to get these results.”
- **Story free offer:** In your Story, talk about a free offer (“I have a free 7-day meal plan for busy professionals”) and add text like “DM me ‘MEAL’ if you want it.”
- **Create urgency:** “I only have 2 coaching spots left this month. DM me to find out more!” (Use this responsibly; it can hurt trust.)
- **Video CTA:** A reel about a free resource and a verbal CTA instructing viewers to leave a comment for a free diet guide.
- **Video structure:** Start with a wild transformation, explain, and build up to the exact method. Reveal the guide as that method and provide the next step for viewers to take (obtaining your guide, of course).

STARTING THE CONVO

● Qualifying without even DMing

- Avoid engaging with inactive accounts.
- If an inbound lead doesn't follow you, but follows business gurus... run. He will pitch you.
- Look for a profile pic and post.
- Avoid messaging people with "HS" in their bio. It would likely be a waste of time.

I want to remind you all that we are messaging prospects with the intent of **understanding their current problems or situation, not to sell**. As a matter of fact, we don't even know if we can help out that individual yet. This is why in the DMs we ask both **situation-awareness** and **problem-awareness** questions, which are introduced later in this playbook.

Keep your responses **short**, and avoid sending massive blocks of text. Each question you ask should have an intention behind it; otherwise, you shouldn't be asking it. We want to respond quickly (within 30 minutes of a lead responding), and if it is a lead you are conversing with, you should respond instantaneously. The goal is to get them qualified and booked asap before that lead goes cold.

● How not to sound (sales robot)

BAD EXAMPLE (SALES ROBOT)	FIX (FRIEND/COACH)
<i>Hey [name], it sounds like you have tried a few different methods and nothing has worked. So what would you say has been your main struggle?</i> (Bad: Feels copy-pasted, scripted.)	<i>So you've tried a ton of stuff and aren't seeing results? What was it about what you've been doing that didn't work for you?</i>
<i>Thanks for reaching out. I'd love to ask you a few questions to see if you're a good fit for my program.</i> (Bad: You sound like a corporate assistant screening for resumes.)	<i>Yo, appreciate the DM man. What was the intent behind reaching out for coaching? Build muscle, lose fat, or wanting some help getting started?</i>
<i>Can you tell me more about your nutrition and workout routine over the last 6 months?</i> (Bad: You just triggered an essay.)	<i>I hear that... what are you doing now for your plan that's making you feel like you aren't seeing enough results?</i>
<i>I understand how that could be frustrating. So what would it mean for you to finally reach your goal?</i> (Bad: Again... sounds fake.)	<i>"Damn that's brutal... Can I ask you a question though? If you could get it handled how much easier would life feel?"</i>

● Brand voice

The goal is for you to sound real, confident, and curious. Three main elements make up your brand voice:

- **Tone:** how you say it.
- **Language:** the words you choose to use/not use.
- **Energy:** the emotional frequency that we are operating at.

● Common mistakes & ideal energy

Common mistakes:

- **Sounding overly professional:** You aren't emailing HR. You are a coach trying to see if you can help people out and see if it's a good fit.
- **Zero personality:** If your messages are perfect grammar, zero emojis, reading like a textbook... you become forgettable.
- **Too desperate/corporate:** "Just following up..." "Just wanted to check in again..." "really excited to speak with you" "no worries, totally understand if you're busy."
- **Too aggressive/transactional:** "Can you make a decision today?" "I only have two spots, do you want it or not?"

Perfect energy to have:

- Curious, and calmly confident, as well as taking personal ownership.
- **Example of ideal transition:** Not saying *"book a call if you want."* But saying via voice message: *"yeah man I mean based on what i've heard I do feel like the team and I can possibly help you out... if you're down for it... you and I can schedule in a call to really dive deeper into where you're at now with [x] and where you want to be with [y] and if it makes sense I can walk you through what some more advanced training would look like... does that sound good?"*

● Characteristics of a good DM opener

1. **It is personal.** - Nobody is going to feel like they want to respond to your DM if you sound like a ChatGPT bot. Be human and say something a bot wouldn't (often something specific about their profile). - Name! Appreciate the [share/follow/like/vote/etc.]. - Personalized comment that ends with a question.
2. **It maximizes the likelihood of you getting a response back.**
3. **It uses context from a previous convo (if you did have one).** - *Example of what to avoid:* If a prospect was just telling you how his dog passed away, do not send him a message from his poll vote like: "Saw you voted on my poll... what have you seen so far that makes you feel like you're not losing as much weight as you'd like?"
4. **It's not overly punctual.** - This goes for all DMs. You do not need to sound like you are writing a paper to be admitted into a PhD-level program. Your tone should be casual and curious.

INTENT & PAST EXPERIENCE QUESTIONS

After your opener, your shift now becomes finding the **tangibles** and the **experience**. A tangible is simply something that a person wants that they don't have. Experience is something that confirms that they currently do not have it.

What matters is the answer you get, NOT the question itself. You need to ask questions that yield you specific responses.

Intent question examples:

- **For a lead that got sent a free guide via a comment on a video:** *"Hey [name], i saw ur comment. What was your intent behind getting the free guide? Just seein if I can help you out a bit with it."*
- **For a follower (indirect):** *"Is there anything in particular that would be helpful for me to make more content on?"*
- This can easily be transitioned into finding a specific tangible. For example, if they say bulking, be curious and ask them what their intent is behind that, or if they are currently bulking.

Past experience question:

- Something that the prospect has seen that's led them to believe that they just haven't met or attained that tangible outcome quite yet. *"What have you seen that makes you feel like you're not losing enough weight?"*

LOGICAL CERTAINTY STAGE

The goal of this stage is simple: **cause, problem, and probe.**

The goal of this stage is not to create small talk. Be specific, stay centered on the task at hand. Make the convo about their problems. We just want to build enough certainty in their current problem for them to actually want to hop on a call with us.

Probing questions:

- *What are you doing now for your nutrition/training/regime that's keeping you from already [getting tangibles they mentioned]?*
- *Looking for an answer that admits that what they are doing right now isn't working.*
- *How long have you been doing that?*
- *Looking to elevate the problem in their mind here by getting them to acknowledge how long this has been an issue.*
- *What caused you to do that in the first place?*
- *Looking to build doubt in the prospect's mind about their current approach. We should get an answer that reflects that.*
- *Do you like it? Besides not [losing as much weight as they'd want/getting as strong as they'd want/etc.] do you like I guess [the process or strategy that they have been detailing]? (Doesn't matter if it is a yes or a no question because nobody likes or hates 100 percent of what they are doing.)*
- *This one is simple; all we are trying to get is a negative description of their current situation.*

The next step

Because nobody dislikes or likes 100 percent of anything, talk to them about what they do like about it, why they like that, and then ask them:

- *Okay, well, would you change anything about [x process] or [y outcome they've been getting] if you could, though?*
- *Why would you change that, though?*
- *And how long have you left it that way?*

TRANSITIONING TO THE CALL

(Get a financial qualification, if appropriate with the amount of lead flow you have, and transition to the call. Preferably via voice note. It lowers resistance to the call.)

Financial qualification: *If there was a way to possibly help you go from [current situation] to [desired state]... would you be willing to invest in that, like IF that's what it took, obviously?*

The transition script: *Got it, well let's do this man, so we aren't going back and forth in the DMs. Why don't we set up a call where we can delve a bit deeper into where you're at with [xyz] and where you want to be, and see if I can even help. Then, if it makes sense I can walk you through what some more advanced training and 1on1 help would look like... is that cool?*

(voice message preferred)

Got it, I'll send you a calendar link. Book ASAP so I can secure it on my schedule. Only takes a couple of minutes.

One call. 45–60 minutes. *The call you book here is the only call. You diagnose, show them what working together looks like, and ask for the decision on that same call. Run it with the Sales Call Script.*

FOLLOW-UP SYSTEM & CADENCE

Case 1: They didn't reply to your initial message.

People miss DMs all the time, don't take it personally. Give it a good 24 hours and then send a nudge.

Follow-up messages:

- *this isn't a bot btw it's me*
- *Did u get my previous msg? Ik life gets busy.*

Case 2: Prospects go ghost mid-convo (after 5 back and forths):

- **30 min:** Like a previous message they had sent in the conversation to get them back in and engaged.
- **Wait an additional 60 min:** Hit em with a ping: “^” “*did i lose ya?*” etc.
- **Then:** 24 hrs, 3 days, 7 days, 14 days, 21 days (DQ or mark lost).
- Each follow-up is measured from the **last** message that you had sent, not from the original message.

HANDLING DIFFICULT DMS & OVERCOMING OBJECTIONS

Changing your mindset on objections:

Here's the thing I want every single one of you reading this to understand... a prospect asking us a question, objection, or reply is NOT them trying to just be a dickhead. Our prospects are going to ask questions because they are genuinely doing what THEY believe is best for themselves.

Socrates believed that “no one knowingly does wrong.” If someone murdered another person, Socrates would argue that in the murderer's mind, they were doing what they thought was right. Everyone is just doing whatever they THINK is right for themselves. If a person chooses an action that produces harm, in their mind, they believe incorrectly that the action will bring some good. Now, we aren't talking to cold-blooded murderers here... but this principle extends to all of us, and the core message here is this:

Everyone is just doing what they genuinely believe is the best course of action for themselves.

Which means: nobody is just stupid for not wanting to buy your service. They were only doing what they thought was best.

Here's the thing: we should learn to love objections. Deep down, prospects want YOU to solve their problem. If I offered every one of you 1,000 **warm, ready to buy** leads, I bet you would be ecstatic, wouldn't you? Because I solved a pain point.

People will do ANYTHING to avoid pain. They just need you to ease their mind and fears so that they can make an investment into themselves.

So now that you understand that, and can keep yourself from blowing up and losing your cool at your prospects, we can talk about handling difficult DMs.

● The proven structure for handling objections in the DMs

Step 1: Agreeance statement. This is a short phrase that you can use to take back control of the conversation. It diffuses the situation and it's a good way to put yourself on their side. Remember, you two are fighting the same battle, as you BOTH want to see the prospect pain free: in shape, with a six pack on the beach, feeling confident.

Examples: “totally understand...” “not a problem bro...” “oh great...” “yeah of course...”

Step 2: Disrupt. This is what we call a pattern-interrupt. With pattern-interrupts, we are basically saying the opposite of what a typical salesperson would say. For example:

“Yea i mean... I'm not even quite sure I can help just yet...”

Step 3: Pop the Q. The goal here is to redirect the conversation and ask a question that takes the focus off of you and BACK ON THEM. Remember, we want the prospect talking about themselves in the DMs as much as possible. The longer we can keep them doing this, the warmer they get and the more likely they will buy on our sales calls.

● When they ask for free coaching

A lot of people have asked me: “oh JP what do I do when a prospect comes to me asking for specific advice.”

The answer here is simple. If a prospect comes to you asking for specific feedback (AKA free coaching):

- **Rule:** Respond with another question.
- **Why:** You can't know how many calories someone should be eating from a DM. Turn their questions into more specific questions to uncover the pain point.

● Asking for the price first

Understanding the WHY behind the objection: Prospects will ask for the price in the DMs out of fear of wasting their time on a call talking about something that they cannot afford. Which seems valid, right?

But here's the thing... if someone truly wants something, they will go get it. Telling them the price does the prospect no justice right now, because all they are making a decision on is the price of the product and not the benefits it adds to their life. They are now missing out on the opportunity to change their lives with your fitness coaching (assuming you have, and you should have, a good service).

The framework: Each line should be sent as a separate message (helps you avoid one fat block of text). Send each message in rapid succession after the next:

Yeah that makes sense man... I mean I don't even know if I can really help you out quite yet. So it's hard to give you a price because we do have programs and options that work within a variety of budgets.

I mean, it's not cheap, so be prepared to invest [your minimum]ish a month minimum. Would it be fair if I learned more about your situation first, like, for example, man:

(go right into a situation question)

● Cocky / “I wanna do it myself first”

Totally get it and respect it. Is that the only thing holding you back? Wanting to do it yourself?

Can I ask you a question... if I gave you a proven, tried-and-tested regime/program/diet that has worked and will continue to work? And this was exactly the regime/program/diet that would get you [desired state]... would it be a challenge for you to not reinvent the wheel at all?

Okay, good, I didn't want to assume, so do you feel like it's fair to allow yourself to potentially see what we might be able to do for you?

ADDITIONAL CALENDLY QUALIFICATION

(Only do this if you are booking 10+ calls a week. This is what we call friction; it helps remove unqualified prospects from the pipeline. If you have minimal leads to begin with, you should be focused on removing as much friction as possible.)

Question on Calendly for qualification:

- *Just to be clear... are you the final decision maker here when it comes to finances?*
- Yeah... It's just me, I wear the pants.
- No, I'd like to talk it over with my partner/spouse first.
- I usually make the call, but would like to talk it over with them.
- You can ask additional questions about work, income, and how much they are willing to invest from a multiple-choice option. But I am not a fan of these for most folks.

If they need to talk it over with a partner or spouse, invite that person onto the call. It's one call, so you want every decision maker on it.

CALL CONFIRMATION CADENCE

- **The night before the appt:** Send a message on Instagram: *Sounds good. Talk to you tmr at [time]* 🤝
- The idea with this one is that they've already sent you a message, perhaps with the call confirmation screenshot, and you don't reply to it right away, but you reply to it at night with this confirmation.
- **2 hrs before appt:** Send another text: *Yo. just checking we're still good to go for our meeting in 2 hrs?*
- **10 mins before:** *Hey man I'll hop on the zoom link in 10 mins, talk soon* 💪

REACTIVATION

Past leads, no-shows, ghosts, and churned clients are the **highest-leverage list you have**. They already know who you are. They already considered buying. Most of them just got distracted, ran out of money, or weren't ready at the time. This is the big one for Tier 2.

Use when: any prior DM thread, intake form submission, ghosted call, or program history exists.

- **Before you send: figure out why they didn't close**

Pull up everyone who was on a sales call with you and didn't buy. For each one, answer:

- **Why didn't they close?** Money, timing, partner, fear, didn't believe it would work for them?
- **What's changed since then?** For them, and for you. New results, new proof, a payment plan you didn't have before.
- **What could move them over the line now?**

Then write the message around that. Someone who didn't close over money gets a different conversation than someone who didn't trust it would work.

- **Past lead who ghosted**

"Hey [name], been a minute. Was running through old conversations and yours stuck out. You were looking at [their goal] back in [timeframe]. Did you end up [solving it / hiring someone / putting it on the shelf]? Or what actually happened there?"

- **No-show / canceled call**

"Hey [name], no hard feelings on the call falling through a while back. Is [their original problem] still a thing for you, or did it sort itself out?"

- **Past client (churned or completed program)**

"[Name], last we worked together you hit [specific result]. Where are you with [their goal area] now? Curious if you've maintained, plateaued, or gone backwards."

(obviously strike up a normal convo first then transition into where they are at currently, if it is a past client you don't need to go sales mode on them. Prioritize lasting relationships).

● When they re-engage

Most will tell you they're either still stuck or have backslid. **Don't pitch yet.** Run the Intent and Logical Certainty questions. Ask what's changed since you last spoke, what they've tried, what's working and what isn't. Then use the transition script to book the call.

● Rules of reactivation

- Lead with curiosity, not a pitch. They already know what you sell.
- Don't apologize for reaching out. You're not a bother. You're a coach with a system that worked for them once (or almost did).
- If they ghost again, run the follow-up cadence. Then mark them lost.

DM VOLUME TABLE (LINKED TO THE SPRINT)

These are the daily targets that produce the Sprint outcome for your tier (Tier definitions live in the Sprint Plan: Starting From Zero / Some Traction / Real Audience).

● Daily DM targets by tier

DM TYPE	TIER 1: STARTING FROM ZERO	TIER 2: SOME TRACTION	TIER 3: REAL AUDIENCE
Network (friends, family, old peers, coworkers)	10–15	5	0–2
Warm (engagers on IG)	3–5	10–15	20–30
Reactivation	0–2	5–10	10–15
Total daily DMs	~15–20	~20–30	~30–45
Order of leverage	Launch to your network first	Warm + reactivation first	Referrals + upsells, then warm (setter)

● Conversion math by tier (30 days)

STAGE	TIER 1	TIER 2	TIER 3
Qualified calls booked	5–10	12–20	30–40
Calls held (~70% show rate)	4–7	8–14	21–28
Closes (30–40% close rate on held calls)	1–3	3–5	8–10+

● If you fall behind

- **Behind on network?** You haven't built the list, or you built it too small. Spend one hour going through your contacts, IG following, and old group chats. Pre-load tomorrow's 15 names tonight.
- **Behind on warm?** Your content isn't generating engagement, or you're not checking story viewers. Both are fixable today. (Tier 1: don't panic. You're not supposed to have warm volume yet.)
- **Behind on reactivation?** You haven't built the list. Spend one hour mining your DMs, intake forms, CRM, and old client roster. Build it once. Burn through it during the Sprint.

TRACKING, REVIEW, & QUALITY ASSURANCE

This is where a lot of people f*ck up. They don't look at data, only at "feelings." The problem is... feelings can be misleading. It's like trying to have a fitness client lose weight when the client doesn't even measure, in any way, shape, or form, the quantity of food that they eat. They will find ways to convince themselves that they ate significantly less or moved significantly more than they did. We are all prone to this, and the only way to prevent it is to have rock-solid data.

● Daily metrics logging

- Log your numbers every day in the **Sprint Tracking Sheet** (PDF #06): DMs sent, replies, calls booked, calls held, closes.
- Articulate what "good" numbers mean to you vs trash numbers.
- Use the inbox labels (Lead, Ordered, Booked, Paid, DQ, Shipped) so your sheet and your inbox match.

If you want a lead tracking sheet as well, click [HERE](#).

● Weekly conversation review

Goal: improve quality instead of just spamming and firing off more DMs.

- Pick 2–3 convos from the week.
- Critique yourself:
- Where could you have asked a better question?
- Where did you move too slow or too fast?
- Where did you miss a pain point?

I already know some of you reading this are asking, "Can I automate this?"

Yes, you can, **BUT** only when you've:

- Used the sheet daily.
- Refined your stages and message cadence.
- Proven the system works manually.

For a **minimum** of **4 weeks**, and **ONLY when** you are consistently booking 10+ calls a week, then you can add on:

- Form integration (Calendly → auto-add booked).
- Zapier/Make integrations: new Calendly event → mark booked and set call date.
- ManyChat tags to mirror stages on the DM side.

IMPLEMENTATION CHECKLIST

Thanks for reading this playbook. By now, you should have a clear understanding of how to set up and execute IG DMs. It's a lot of information, and that is why your only assignment is practice, practice, practice. If you have questions, I encourage you to take initiative and research solutions on your own first. You have all the information you need; now all you have to do is stop planning and act.

Your only assignment is to act on these steps:

- ☐ Set up your IG profile, calendar, Calendly, and ManyChat.
- ☐ Build your list: friends, family, past leads, past clients.
- ☐ Find your prospects (prioritize the quickest route to cash collected).
- ☐ Start convos.
- ☐ Converse with folks and probe.
- ☐ Log every day in the Sprint Tracking Sheet.
- ☐ Transition to financial qualification and book the call.
- ☐ Follow up with old convos.
- ☐ Refine as you go along, and reread this playbook.