



LEAD MAGNET

Launchpad

**A Checklist for Converting
Clicks to Customers**

by Easy Artisan Websites

LEAD MAGNET LAUNCHPAD

Decide on the type of opt-in you'll be using.

Will someone be signing up to your newsletter or will they be signing up to receive some kind of free content?

Choose a location for your opt-in form. Will it be on an existing page, blog post or a new landing page?

Create your lead magnet.

If someone is signing up to receive free content, you'll want to create this first. You can skip this step if it's a newsletter opt-in.

Create a lead magnet to be give to your subscribers in exchange for their email address.

Upload to your file hosting provider. This could be your website or a dedicated platform such as Amazon S3.

Test that the URL works and you can successfully load the file.

Create a "Thank You" page.

Your "Thank You" page is where a new subscriber will be redirected after they have signed up via your form.

Write copy on your "Thank You" page that explains the next steps for your subscriber. Set expectations!

Include whitelist instructions here if they're not in your delivery email, so your emails don't end up in spam.

Add in more reading opportunities. Users who have opted-in are ready to engage with more of your content.

Add in social proof, testimonials or links to case studies.

Is there an up-sell opportunity? If there is, feel free to include a pitch for a product or service that can be purchased.

Ensure that you connect your "Thank You" page to your opt-in form, so that subscribers are redirected.

Create a delivery email.

The delivery email is the first one that you'll be sending out after a new subscriber opts in. This will either deliver your lead magnet or just be a welcome email.

- Write your delivery / welcome email.
- Write a compelling subject line for your email.
- Make sure you include a link or the details that the person opted in to receive. For example a link to a PDF or other lead magnet.
- Take the time to set expectations again for what will happen next.
- Include whitelist instructions explaining how to prevent emails from going to spam here if you didn't do that earlier.

Create an email sequence.

After your delivery email, you should be nurturing your new subscriber. This could be through a welcome email series, a specific nurture sequence or maybe a sales email sequence.

- Decide on an ultimate "goal" for your sequence. What do you want someone to do at the end? E.g. book a call or make a purchase.
- Write the additional emails that will go into your sequence.
- Write compelling subject lines for your emails.
- Establish an email tone that fits your brand and goal.

Set up tags and/or groups in your email marketing software.

Depending on the email platform that you use, you'll want to set up tags or groups to control your email automation.

- Set up a tag or group for your new subscribers. This is so you can segment them when they join your list.
- Give your tag or group a descriptive name so that it's easy for you to remember.
- In some cases you'll want to use multiple tags or groups, so don't forget to set up the additional elements, as needed.

Create your email automation.

Set up an automation in your email platform that will deliver your emails to your new subscriber.

- Add in a trigger for your automation. This will usually be when someone subscribes and is added to a tag or group. Add your emails into the automation.
- Don't forget to leave a wait / delay between your emails. This would typically be 1 day, but you can set this to anything you like.
- Have an end goal for your automation. Where do you want subscribers to go after they've received your last email?
- Don't forget to turn your automation on!

Create your opt-in form.

Now it's time to get your opt-in form set up on your website. Load up your favourite page builder / form plugin / CMS and you can get started.

- Use a clear and easy to understand headline.
- Have a picture of the item that someone is opting in to receive, e.g. a lead magnet cover.
- Describe clearly what the subscriber is signing up to receive.
- Use a large CTA button that is easy to see and in a contrasting colour.
- Link to your privacy policy and any other respective elements / text as defined by local laws in your country.

Connect the form to your email marketing platform of choice

You'll usually do this by adding the API key for your email platform in the settings of your CMS, plugin or software.

Test and test again!

This is the most important step. Do not skip it!!

Check to see that your emails are sent successfully and that you receive them in your inbox. Tip: You may want to temporarily change the wait time between emails to 5 minutes.

Don't forget to change the wait time between emails back if you shortened them for testing purposes.

Click the links in your emails - make sure that everything is loading correctly.

Set your opt-in to LIVE!

You've set your new opt-in form up, you've got a delivery automation created and you've tested everything. Time to make it live, drive some traffic and have a nice cup of coffee :)



Need Some Help?

Looking for help creating a winning lead magnet and email automation? We've got you covered!

Click the button below to get in touch.

[SCHEDULE A DISCOVERY CALL](#)