



Ignite Your Tax Resolution Lead Generation With Lead Magnets



Sandi Leyva, CPA





Where to Get the PowerPoint

<https://taxreptoolbox.com>

About today's speaker



Sandi Leyva, CPA

- Digital marketer since 1998
- Offering websites, social media, newsletters, videos



Questions

- Type them on the question box any time.

Lead Magnets: What and Why

What is a Lead Magnet?

- It's a free offer of value to a prospect in exchange for their personal info (email) and permission to be able to email them in the future
- It can be a report, a sample, a demo, a trial, an appointment, a webinar, a video, etc. etc.

What examples can you think of?

- Food samples at grocery stores
- The ubiquitous AOL disk
- Beauty aid samples, from moisturizers to shampoos to eye shadows
- 14-day software trials

Sales / Opt-in Page

- <https://acceleratorwebsites.com/8-essential-components/>

**Accountants, CPAs,
QuickBooks
Consultants, EAs,
Bookkeepers**

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from Your Website?*

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**8 Essential Components of Your
Lead-Generating Website**

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Need help with digital marketing?



[Survey] Are You Curious About How Other Accounting Firms Get New Business?



Websites. Networking. Social Media. Direct Mail. Chat Bots. Events. Google Ads. Blogging. Open Houses. Newsletters. Trade Shows. Speaking. Remarketing. Messaging. Cold Calling. And that's just the beginning.

Today, there's an endless list of places to find clients, but your time and resources are limited. What's working? What's a waste of time and money? Here's how to find out at no cost to you.

CPA Trendlines owner Rick Telberg and Accountant's Accelerator founder Sandi Leyva are currently conducting the New Clients Survey, and you can take part. We want to hear from you what's working today and what's not working anymore

Sign-up to take the survey.

First Name:

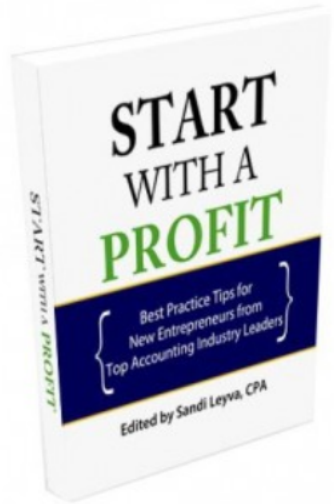
Last Name:

Email:

[Take the Survey](#)

We respect your [email privacy](#).

Get Valuable Advice (At No Charge!) On Starting (Or Accelerating) Your Business From Top Thought Leaders In The Accounting Industry



It's all in the new eBook, *Start with a Profit*. Learn from small business geniuses: Alison Ball, Sharada Bhansali, Randy Johnston, Ed Kless, Sandi Leyva, Monika Miles, Clayton Oates, Edi Osborne, Leslie Shiner, Doug Sleeter, Sandra Wiley, Geni Whitehouse, and Scott Zarret.

Editor Sandi Leyva asks each thought leader: ***“For someone who wants to start a new business from scratch today, what is the most important strategy or tactic you'd tell them about to help them succeed?”***


The result is a collection of best practice tips (and warnings!) that you can incorporate into your business immediately, whether you're a new entrepreneur or a seasoned veteran.

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Start with a Profit**

Name:

Email:


*You'll also be added to Sandi's biweekly newsletter
Thrive*



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Get Started with Sandi Smith Leyva's FREE Course,
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Your Business Revenue**



Send me immediate access to my **FREE** Course, "37 Ways to Find New Clients & Boost Your Business Revenue"

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Free Resources Page

- <https://accountantsaccelerator.com/free-resources/>
- <https://taxrepllc.com/resources/>
- <https://tgpublish.com/complimentary-resources/>
- <https://tgpublish.com/whitepapers/>

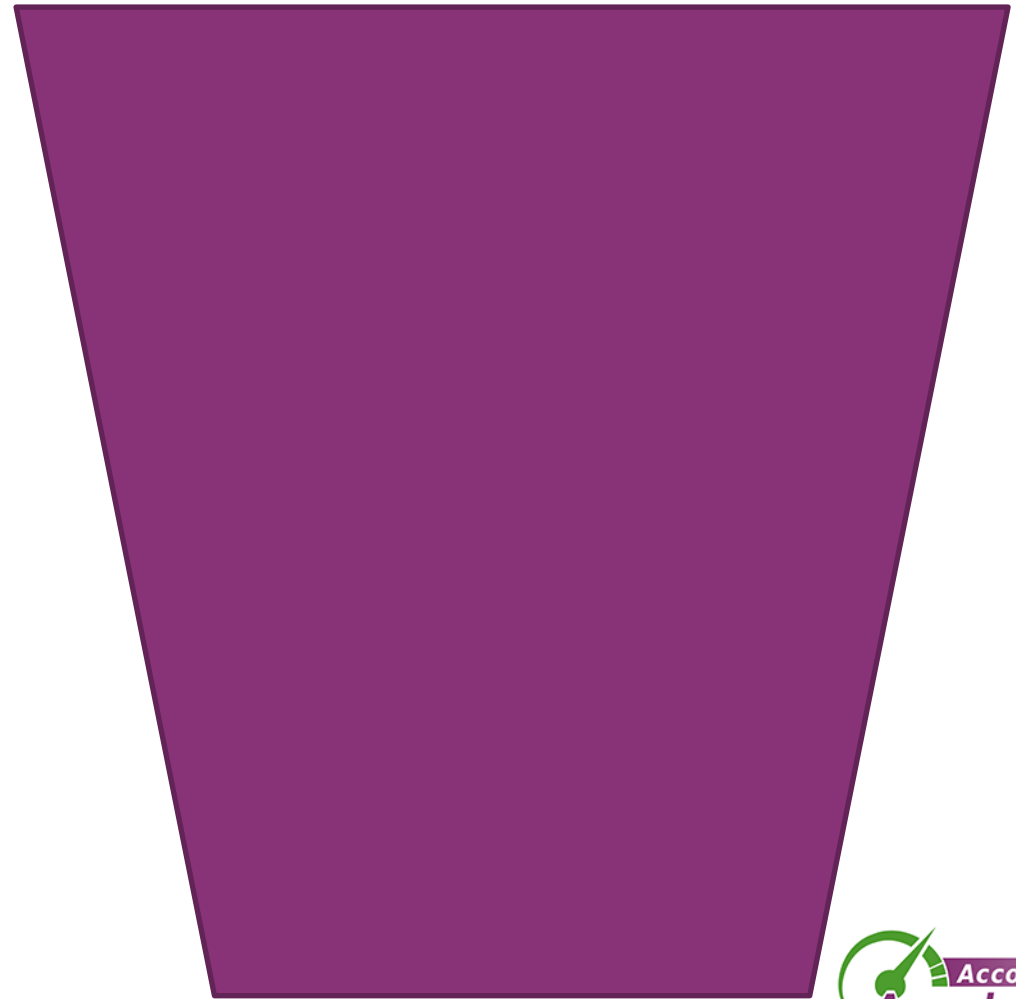
Why Use a Lead Magnet?

- It can warm up a prospect who is not ready to buy
- It can educate your prospect about what's involved in solving their tax pain point
- It's a start in building funnels to serve multiple stages that a prospect goes through in their buying cycle
- It's noteworthy to know that a large percentage of prospects will NOT buy on first contact. If you don't have a process set up to catch this, you're leaving a LOT of money on the table

Stages A Buyer Goes Through

Old-Fashioned Marketing Funnel

- Awareness
- Engagement
- Conversion (3% of first contacts)
- (Retention)



Phases of Marketing (Funnel)

Awareness

Education

Engagement

Education

Money
exchange

Upsell

Loyal
client

Types of Prospects – Characteristics to Address

- Individual (tax)
- Small Business Owner
- Confused and scared
- Owes less than \$10K
- Can't afford it
- Freedom-loving anti-tax
- Catastrophic life event
- Disorganized, no records



Buyer Stages

	Individual	SMB
Awareness	Tax situation is getting more complicated	Under-withheld payroll tax
Engagement	Price shops to see alternatives; gets your tax res report	Sees mistakes and need; gets your tax res report
Conversion	Sets appointment	Sets appointment

Buyer Stages

	Individual	SMB
Awareness	Hiring a professional gives a better, more accurate outcome than DIY	Screwing up pr tax can lead to jail
Engagement	Why your firm is better, your firm's capabilities	Why your firm can help them dig out of their hole, your expertise
Conversion	How to work with you	How to get started

Content Plan

- You need content for each of these cells
- So that you are meeting your prospect at the exact point they are in


































The New Funnel in Marketing

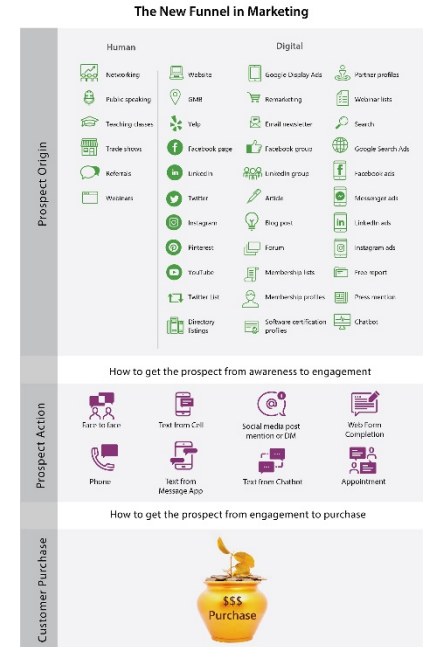
Prospect Origin

Human

-  Networking
-  Public speaking
-  Teaching classes
-  Trade shows
-  Referrals
-  Webinars

Digital

-  Website
-  GMB
-  Yelp
-  Facebook page
-  LinkedIn
-  Twitter
-  Instagram
-  Pinterest
-  YouTube
-  Twitter List
-  Directory listings
-  Google Display Ads
-  Remarketing
-  Email newsletter
-  Facebook group
-  LinkedIn group
-  Article
-  Blog post
-  Forum
-  Membership lists
-  Membership profiles
-  Software certification profiles
-  Partner profiles
-  Webinar lists
-  Search
-  Google Search Ads
-  Facebook ads
-  Messenger ads
-  LinkedIn ads
-  Instagram ads
-  Free report
-  Press mention
-  Chatbot



Human



Networking



Public speaking



Teaching classes



Trade shows



Referrals



Webinars



Website



GMB



Yelp



Facebook page



LinkedIn



Twitter

Digital



Google Display Ads



Remarketing



Email newsletter



Facebook group



LinkedIn group



Article



Partner profiles



Webinar lists



Search



Google Search Ads



Facebook ads



Messenger ads



Instagram



Pinterest



YouTube



Twitter List



Directory listings



Blog post



Forum



Membership lists



Membership profiles



Software certification profiles



LinkedIn ads



Instagram ads



Free report



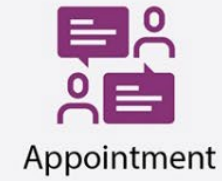
Press mention



Chatbot

How to get the prospect from awareness to engagement

Prospect Action

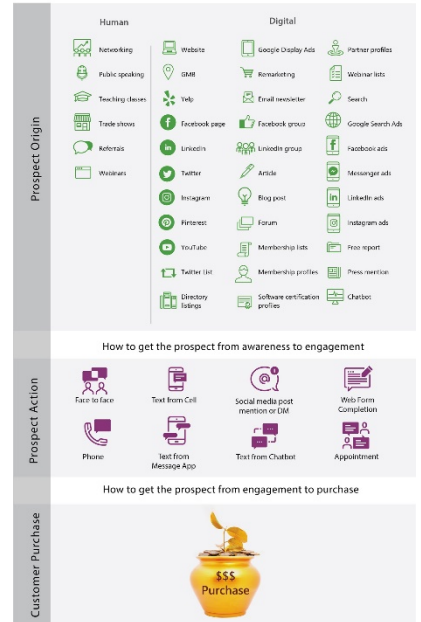


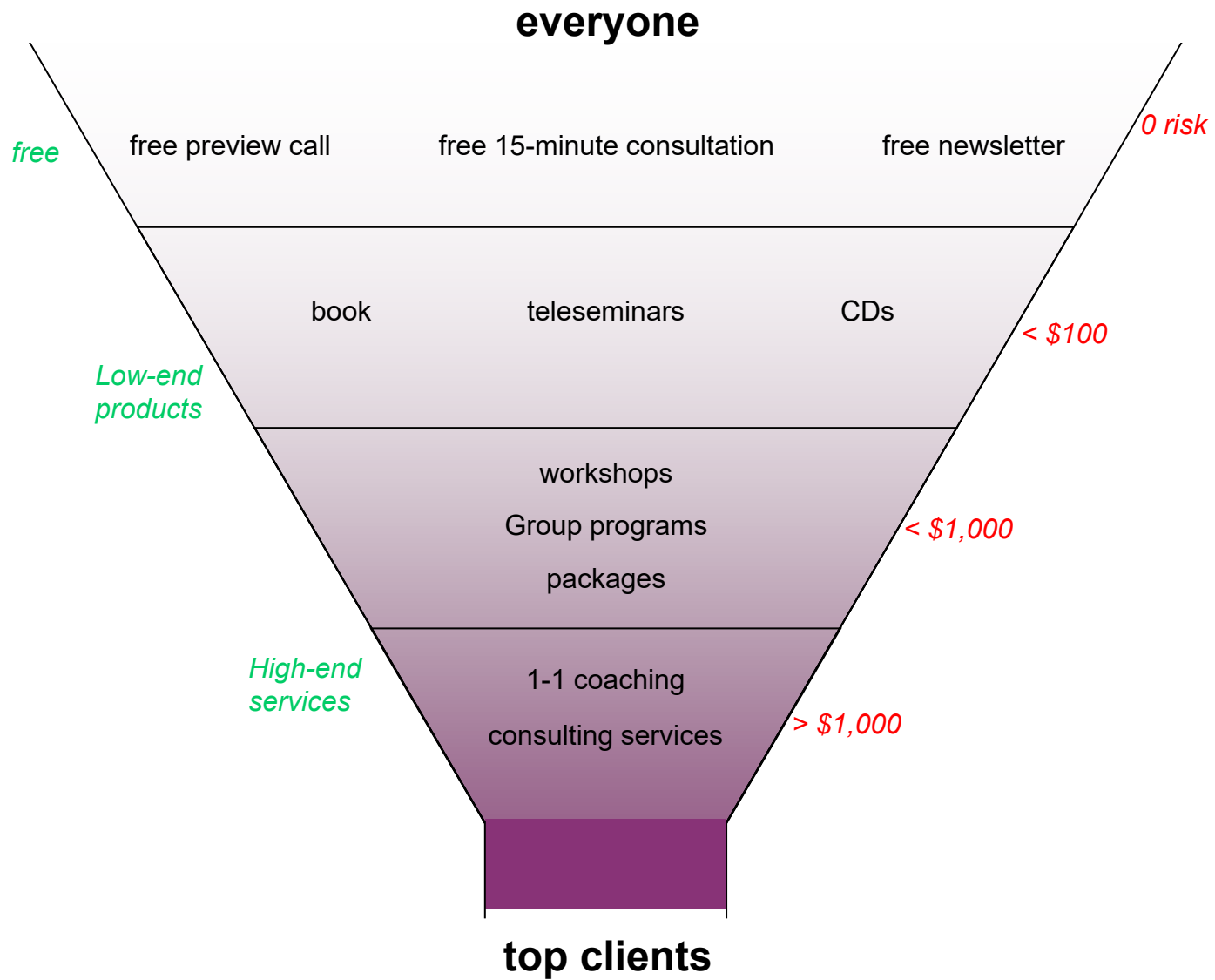
How to get the prospect from engagement to purchase

Customer Purchase

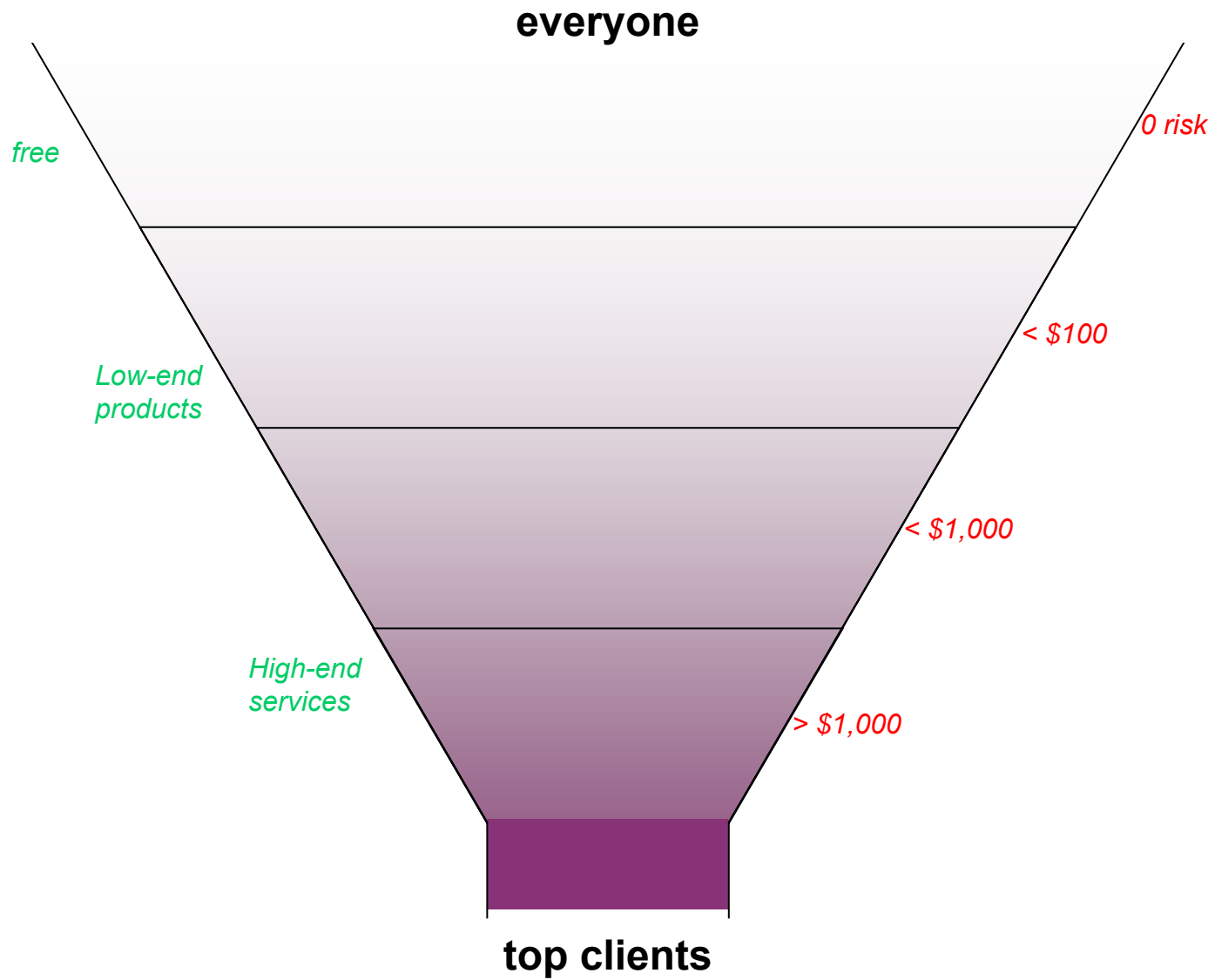


The New Funnel in Marketing





Your Marketing Funnel



Your Marketing Funnel

Marketing Foundation

- Your entire funnel should center around your website
 - It's the last place they will look online before they call you
 - All your lead magnets should be there
 - All your origin marketing (social, chat, other websites) should lead them to your website

Components

Setting up your lead magnet process

- Components you need
 1. **A lead magnet – free value-add item – report, video, etc.**
 2. **Email marketing automation software**
 3. A web page that describes your lead magnet (opt-in page)
 4. A confirmation page
 5. A “confirm your email” email
 6. A thank you page
 7. A welcome email that delivers their lead magnet
 8. A welcome email series (optional)



Sales / Opt-in Page

- <https://accountantsaccelerator.com/60-ways-to-increase-business/>

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Thrive.



Confirmation Page

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Go to your inbox and click the link in the confirmation email to confirm your registration. We do this to protect you from spam.

You'll also receive a complimentary subscription to my weekly ezine Thrive. Be sure to white-list sandismith.com to keep our emails from going to your spam folder.

Please check your inbox for an email from us to confirm your subscription.

In the meantime, if you have any questions please call our office at 408-550-4325 or email us at support@sandismith.com.

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Confirmation Email


The screenshot shows a Gmail interface. On the left is a sidebar with folders: Compose, Inbox (6), Sent, Drafts (13), All Mail, Spam, and Trash. Below these are sections for Meet (Start a meeting, Join a meeting) and Hangouts (Accountants Ac). The main area displays an email from Sandi Leyva with the subject "Response Required: Please confirm your request for information." The email body contains a blue button labeled "Confirm my subscription" and a "Thank you! Accountant's Accelerator" message.



Thank you page, includes lead magnet delivery

- <https://accountantsaccelerator.com/ty60ways9203/>

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To download the pdf, click the link above so the report appears. Move your mouse to the top right of your screen and click the save icon to save the report to your computer.

If you have any questions, feel free to contact us at Support@sandismith.com

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Welcome email, delivers lead magnet

The Lead Magnet

The screenshot shows a web browser window with the address bar displaying `accountantsaccelerator.com/wp-content/uploads/2019/03/60-ways-report.pdf`. The browser's context menu is open, listing various actions such as 'New tab', 'New window', 'History', 'Downloads', 'Print...', and 'Exit'. The main content of the page is a PDF document titled '60 Ways to Increase Your Accounting or Bookkeeping Business Revenue' by Accountant's Accelerator. The document includes a sub-header 'A Special Report by Sandi Smith Leyva' and several sections of text and images. The Windows taskbar at the bottom shows the search bar with the text 'Type here to search' and the system tray with the date and time '11:50 AM 8/24/2020'.

Accountant's Accelerator
Accountants, CPAs, Bookkeepers, Tax Preparers,
QuickBooks® Consultants, and Accounting Software Resellers

60 Ways to Increase Your Accounting or Bookkeeping Business Revenue

A Special Report by Sandi Smith Leyva

Are you looking for ways to increase your business revenue in your tax or accounting business? Here are some ideas for you to consider.

For best results, read this when you are not hurried or stressed. There are open mind. You may have thought about or considered some of these in the past when it was not the right time, and maybe now is the right time.

Don't let fear or our natural dislike for change cause you to think negatively as you read these. It's easy for us to get busy about changing things in our business, but you won't get more revenue keeping things the way they are!

Think about the pros/cons of these ideas before you think about the negatives, and you might actually have some ideas to choose from when you're done. And remember, it's all about helping the client and being valued and paid what you're worth.

3. Stop giving away services for free.
Are you offering clients advisory/consult services while charging a bookkeeper rate? Are you acting as a coach to some clients without charging for your coaching services? If so, stop it. You're giving away services for free, and this isn't helping your revenue!

4. Add new features to your existing services.
If you offer bookkeeping but not budgeting, add the feature of budgeting to your service and increase your rates accordingly. If you offer tax return filing but not tax projections, then add it. Your clients may already be

you. And tell them how much you appreciate their referrals. You have to say "I read that, don't assume clients know."



Setting up your lead magnet process

- Components you need
 - **A lead magnet – free value-add item – report, video, etc.**
 - **Email marketing automation software**
 - A web page that describes your lead magnet (opt-in page)
 - A confirmation page
 - A “confirm your email” email
 - A thank you page
 - A welcome email that delivers their lead magnet
 - A welcome email series (optional)

How to Set These Up

1. Write your lead magnet first.
2. Write your sales page, confirm page, and thank you page.
3. Write your confirm email and welcome email.
4. Write some teaser articles, posts, etc. to drive traffic to your sales page.
5. Then worry about the tech.

Top Lead Magnet Ideas

- <https://blog.hubspot.com/marketing/creating-lead-generation-offers-from-blogs>
- <https://optinmonster.com/9-lead-magnets-to-increase-subscribers/>
- <https://ianhenman.com/lead-generation-accountants/>

Best LM Ideas for Accounting/Tax

- Checklists!
- Resource List
- Calendar of Due Dates made into a pretty infographic
- Spreadsheet
- Calculator
- State of the industry
- Roundup
- Quiz
- Challenge
- Free consult
- Free quote

Now the details and best practices of each component

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Sales / Opt-in Page

- Best practices
 - Audience
 - Sharp headline
 - Benefits
 - Few fields
 - Big SUBMIT button
 - Claim My Bonus!
 - What they get
 - Privacy Policy link

Accountants, CPAs, QuickBooks Consultants, EAs, Bookkeepers

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Great Sales/Opt-in Pages


- 30-day list building challenge
 - Case study: <https://nathalielussier.com/blog/blogging/free-email-marketing>
 - Sales page: <https://30daylistbuildingchallenge.com/signup-now/>
- Product Launch Formula – elaborate opt-in
 - <https://masterclass.productlaunchformula.com/howtolaunch>
- EY
 - https://www.ey.com/en_gl/covid-19/enterprise-resilience-tool

Confirmation Page

- One goal
 - Find and click on the email

The screenshot shows a confirmation page for Accountant's Accelerator. At the top, a purple banner reads "We're here to support you. Our new Resource Center is [here](#)." Below this is the site's header with the logo, navigation menu, and contact information. The main content area features the heading "One More Step to Register for our complimentary product" and instructions to check the inbox for a confirmation email. A footer section contains contact information and a 100% satisfaction guarantee badge.

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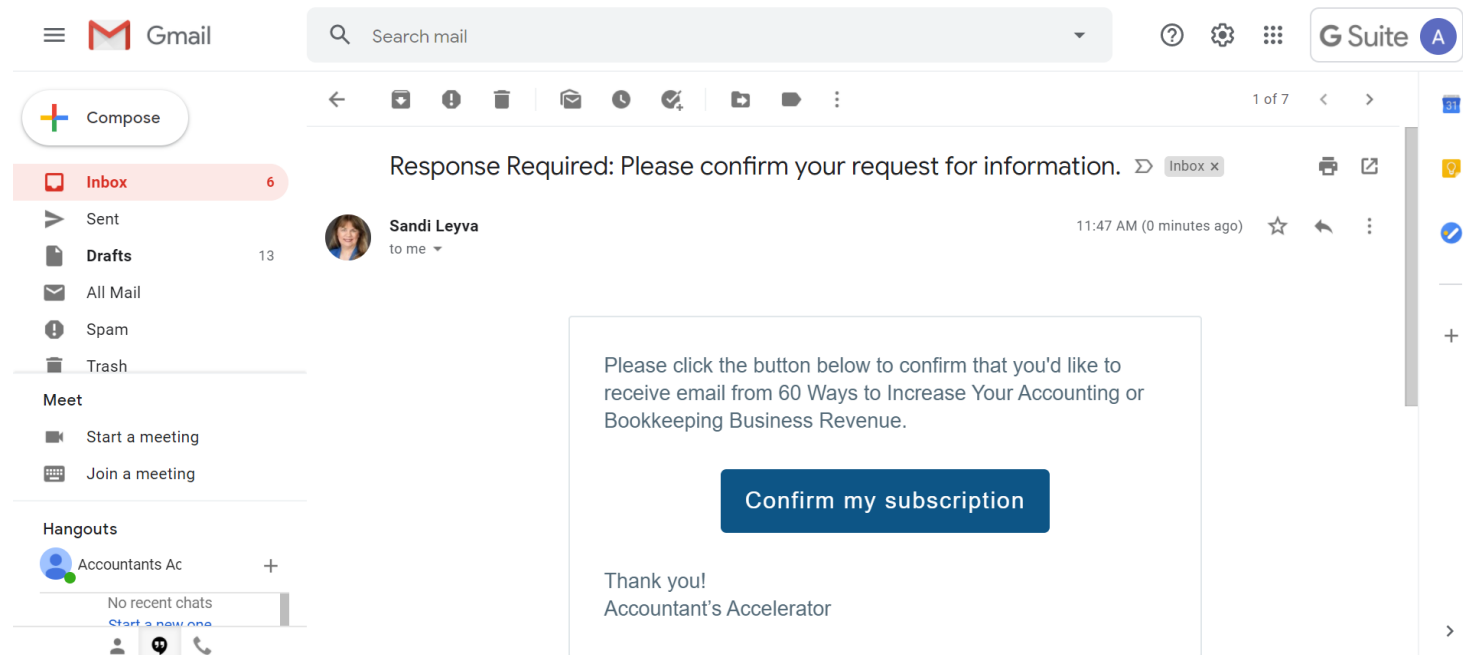
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If, for any reason, you are not completely satisfied you can



Confirmation Email

- One goal
 - Find and click on the email




Thank you page

- Deliver the promise
- Upsell or connections

The screenshot shows a thank you page for the Accountant's Accelerator website. At the top, a purple banner reads: "We're here to support you. Our new Resource Center is [here](#)." Below this is the website header with the logo, navigation menu, and contact information. The main content area features a heading "60 Ways to Increase Your Accounting or Bookkeeping Business Revenue" and a section for downloading a report. The footer contains contact information and a 100% satisfaction guarantee badge.

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No-Risk Guarantee

All of our products are backed by our 100% satisfaction guarantee.

If, for any reason, you are not completely satisfied you can



Thank you page

- Add engagement ops

1. Your receipt.
2. One from sandi@accountantsaccelerator.com providing details.
3. One from customercare@gotowebinar.com, the webinar software we use. You'll need the link in this webinar to join. You'll also get a reminder one day and one hour before the webinar.

Please WHITELIST those email addresses if your firewall is particularly strong! (here's a [tutorial on whitelisting](#) if you need it.)

Still have questions? Email support@accountantsaccelerator.com anytime and we'll get on it!

If you don't get these emails within one day, you can manually register for the webinar by clicking on the green button any time.

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Connect with Sandi Leyva on

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Join Accountant's Accelerator LinkedIn

Group <https://www.linkedin.com/groups/5159616>

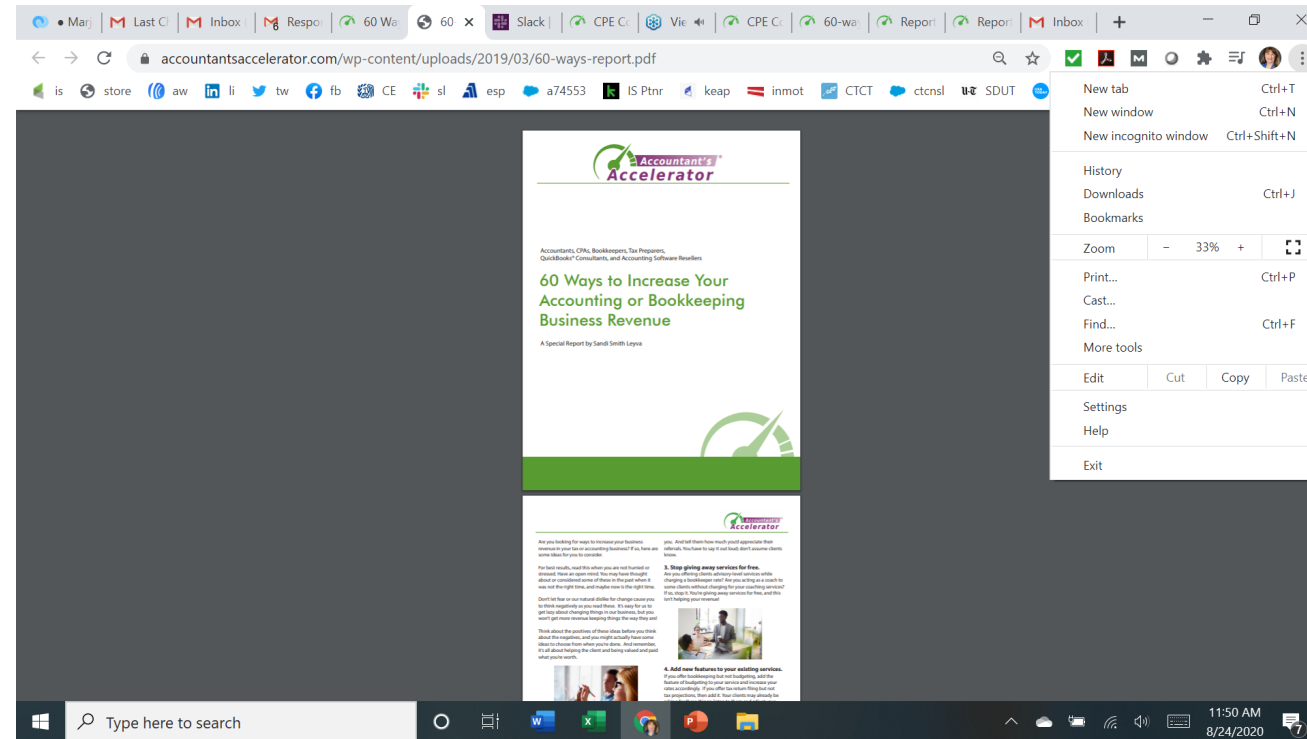


Welcome email, delivers lead magnet

- Congratulate/welcome them
- Deliver the item again
- Tell them a little about you
- Whitelist
- Let them know what to expect from you

The Lead Magnet

- Delivers value / education without giving away your services
- Upsell at end – contact us



The Lead Magnet

- Title is very important
 - Needs to be very snappy
 - Emphasis benefits
 - Connect with pain
 - Try to show them “what they don’t know they don’t know”
 - Use words like secret, ultimate guide to, mistakes you can’t afford to make, fast and easy, simple, how to, but also be honest
 - Include a number and format your LM like a bulleted list

The Lead Magnet – Sample Titles

- The 5 Mistakes Taxpayers with IRS Debt Can't Afford to Make
- How to Recover from an Ex-Spouse Who Dumped Their IRS Debt on You
- 3 Ways to Dig Out of the Payroll Tax Debt Black Hole
- The Big Secret to Getting IRS Penalties and Interest Waived
- How to Get Your Passport Back from the IRS
- How You're Costing Yourself \$500+/Month Every Month You Delay Dealing with Your IRS Problems (owes \$10K+)

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 - A thank you page
 - A welcome email that delivers their lead magnet
 - A welcome email series (optional)

Campaigns

- What's a campaign?
 - Marketing centered around a goal
 - We can create a campaign for our lead magnet
 - Includes multiple channels

Example Campaign

- Implement the lead magnet
- Add opt-in code to relevant blog article pages
- SEO the sales page; hide the ty page from search results
- Write and schedule social media posts
- Email your list letting them know they can get the lead magnet
- Run FB, Google ads to the sales page
- Look back at the funnel to see what else we can do.


































The New Funnel in Marketing

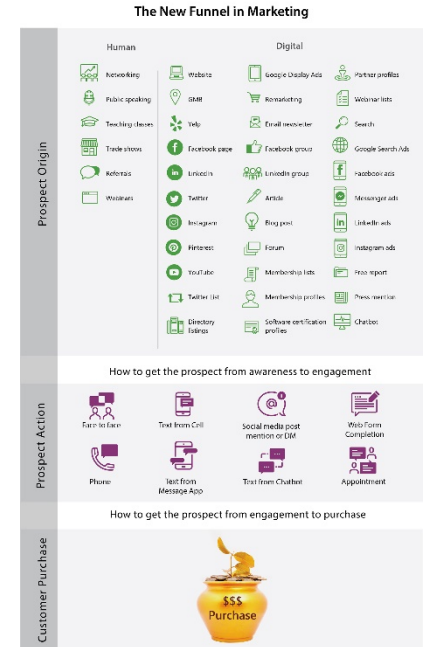
Prospect Origin

Human

-  Networking
-  Public speaking
-  Teaching classes
-  Trade shows
-  Referrals
-  Webinars

Digital

- | | | |
|--|---|---|
|  Website |  Google Display Ads |  Partner profiles |
|  GMB |  Remarketing |  Webinar lists |
|  Yelp |  Email newsletter |  Search |
|  Facebook page |  Facebook group |  Google Search Ads |
|  LinkedIn |  LinkedIn group |  Facebook ads |
|  Twitter |  Article |  Messenger ads |
|  Instagram |  Blog post |  LinkedIn ads |
|  Pinterest |  Forum |  Instagram ads |
|  YouTube |  Membership lists |  Free report |
|  Twitter List |  Membership profiles |  Press mention |
|  Directory listings |  Software certification profiles |  Chatbot |



Human



Networking



Public speaking



Teaching classes



Trade shows



Referrals



Webinars



Website



GMB



Yelp



Facebook page



LinkedIn



Twitter

Digital



Google Display Ads



Remarketing



Email newsletter



Facebook group



LinkedIn group



Article



Partner profiles



Webinar lists



Search



Google Search Ads



Facebook ads



Messenger ads



Instagram



Pinterest



YouTube



Twitter List



Directory listings



Blog post



Forum



Membership lists



Membership profiles



Software certification profiles



LinkedIn ads



Instagram ads



Free report



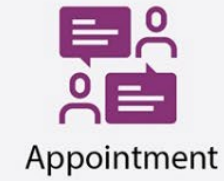
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Chatbot

How to get the prospect from awareness to engagement

Prospect Action

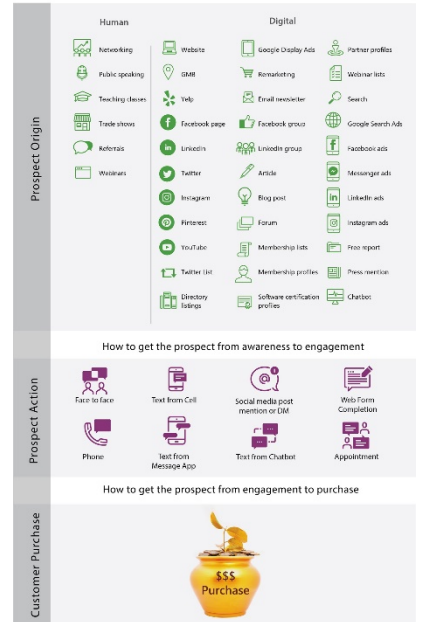


How to get the prospect from engagement to purchase

Customer Purchase



The New Funnel in Marketing



Campaigns

- Add line to your email signature
- Add promo box on your home page
- Add promo item on your FB page, LI section
- Mention lead magnet in your ProAdvisor profile description
- Mention lead magnet in all other profiles (Chamber membership) that allow it

Campaigns

- Run remarketing ads for lead magnet
- Post teasers on Pinterest, Slideshare, others
- Write promo copy for affiliates
- Send promo copy to partners to share to their followers
- Send a press release

Repurposing Content

- Once you have a body of work in one format, convert it to all other formats:
 - Video
 - Webinar on demand
 - Slideshow
 - Audio/podcast
 - Web page/blog post
 - Newsletter
 - Book
 - Social media posts and graphics (cut it up into many pieces)
 - Pretty illustrated PDF
 - Infographic
 - Possibly a quiz
 - Other languages

Budget

Costs

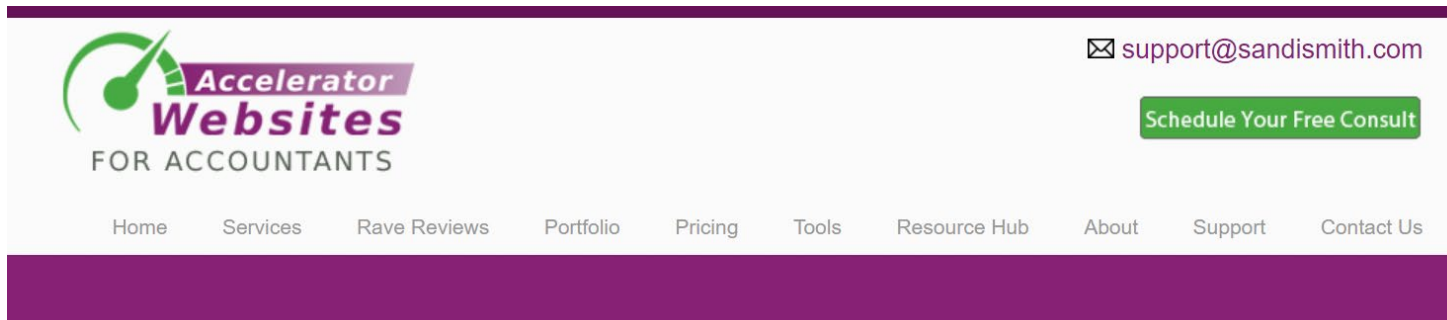
- Lead magnet development
 - \$500 - \$1,500
- Email marketing system or CRM
 - Free to \$300/month
- Installation labor
 - Up to \$1,000
- Campaign creation
 - Up to \$5,000

Revenue

- Average revenue per client per year
- # Number of new clients from the lead magnet
- Overall marketing costs as a % of revenues: 4-6% on average

Done-for-You Packages

- <https://acceleratorwebsites.com/lead-magnet-setup/>



Lead Magnet Setup Packages

	Basic	Campaign
Constant Contact Email Marketing	You Supply	You Supply
• Opt-in Setup	✓	✓
• List Setup	✓	✓
• Email Automation	✓	✓
WordPress Web pages	You Supply WordPress site	You Supply WordPress site
• Opt-in Sales Page	✓	✓

Need help with c



Parting Thoughts

- Spend time on content creation – which is your expertise
- Make sure your topic hits the pain points of prospects
 - You risk attracting the wrong clients or no one if this is wrong
- Delegate/outsource the tech part – too much learning curve
- Repurpose your content

Your Action Items

- What one thing will you do as a result of this webinar?



Appendix 1: Funnel Health and Metrics

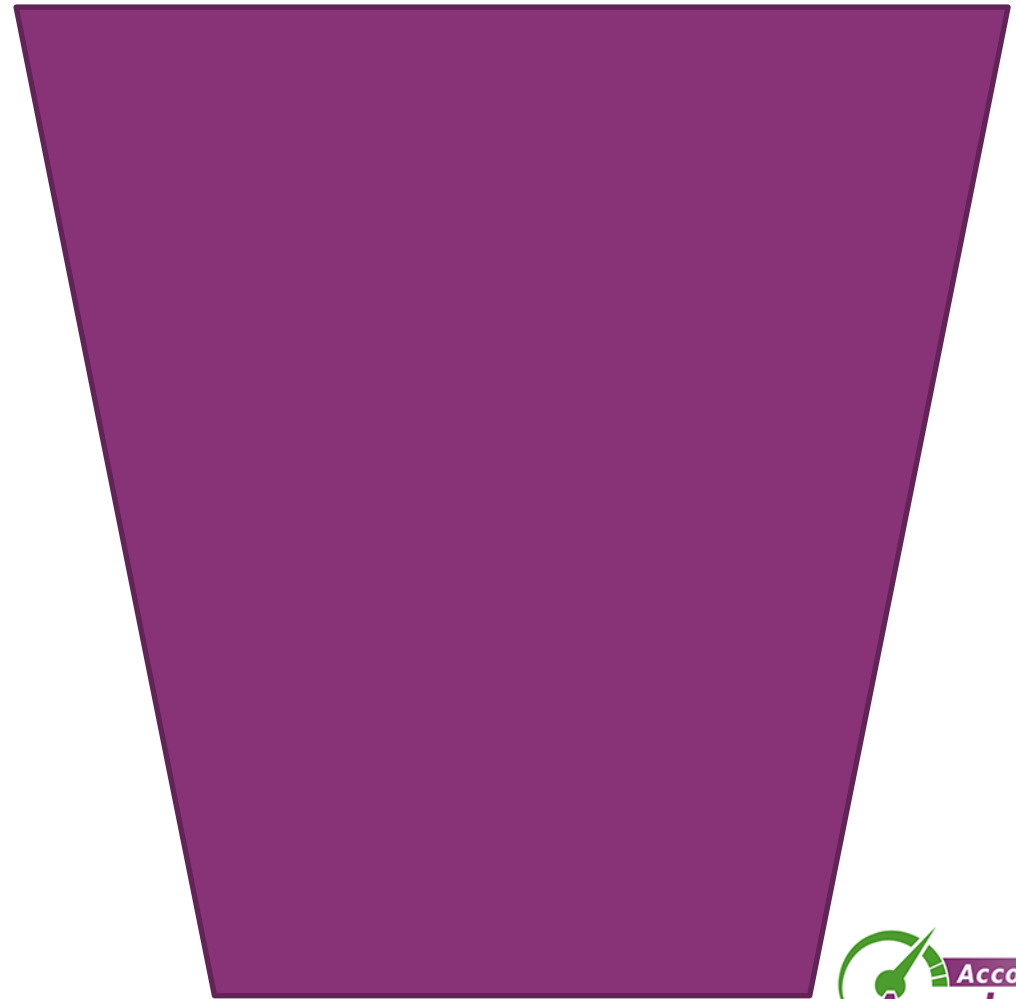
Funnel Health

A stethoscope with a grey tube and silver chest piece is positioned diagonally across the frame. Below it, a stack of white medical forms is visible, with some text like 'DEPT. NO.', 'ADDRESS', and 'DISPENSE AS WRITTEN' partially legible. The background is a plain, light-colored surface.

- Conversion rates
- Awareness: Engagement
 - Web visitors who take action / web visitors who don't
 - Click-through rate – Ads
 - Opt-in rate = $\# \text{ opt-ins} / \text{unique page visits}$
- Engagement: Conversion
 - # Appointments / Sales
 - # Trials / Sales
 - # Proposals / Sales

Old-Fashioned Marketing Funnel

- Awareness
- Engagement
- Conversion (3% of first contacts)
- (Retention)



Metrics for Awareness

- # new website visitors
- Ad impressions
- Press mentions, influencers
- Channel sources
 - Opt-ins (could also be engagement)



Metrics for Client Engagement

- # returning site visitors
- Social media followers – low quality
- Email subscribers and metrics
- Blog page readers
- Ad clickers
- # Opt-ins
- # Trials opened
- # Event visitors



Audiences and Lists

- A big deal to have warm lists/audiences you can contact
 - Email marketing list
 - LinkedIn group
 - Emails from LinkedIn connection
 - If your website is pixelated
 - List of people in Google you can show ads to
 - List of people in Facebook you can show ads to



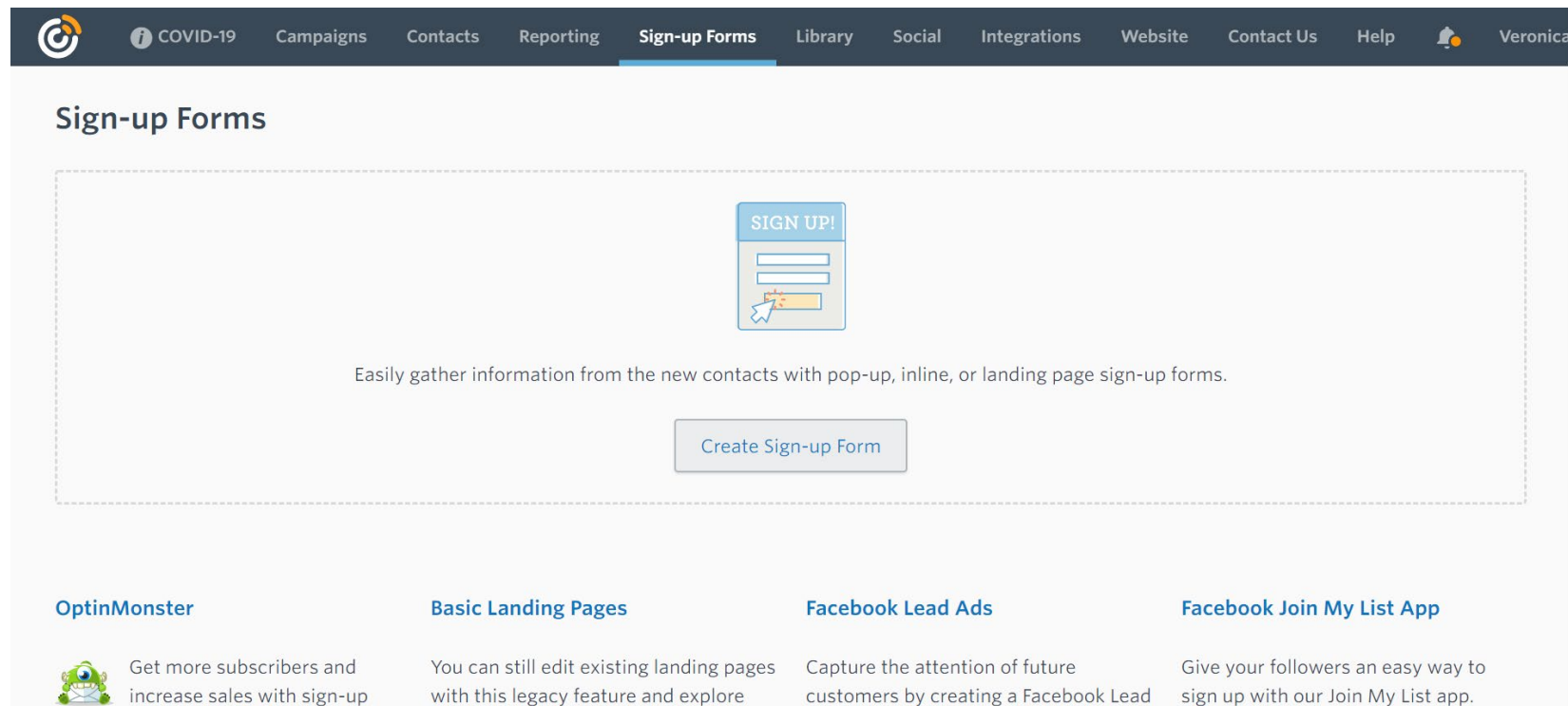
Metrics for Client Conversion

- # new customers
- # proposals sent
- Revenue per customer
- Revenue per visitor
- Days to conversion from initial engagement
- Average sale
- Sales

Appendix 2: How-to in the Software

Let's Set One Up in Constant Contact

- Log in and go to Sign-Up Forms

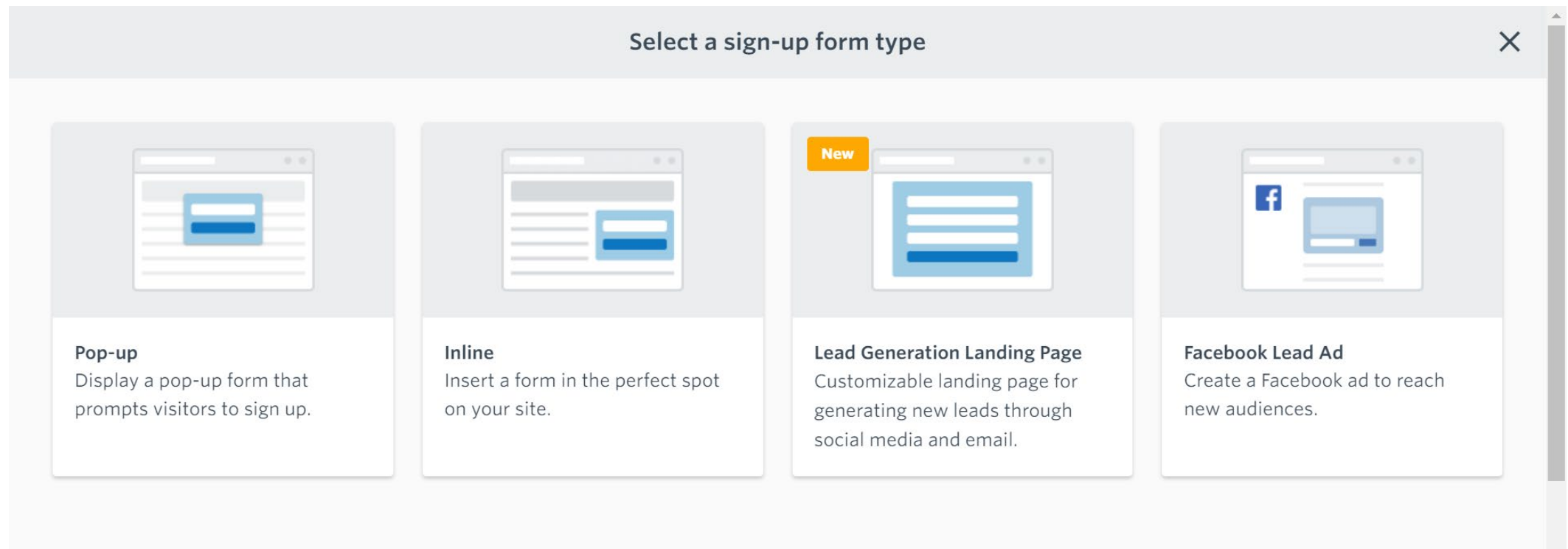


The screenshot shows the Constant Contact dashboard with the 'Sign-up Forms' tab selected. The navigation bar includes: COVID-19, Campaigns, Contacts, Reporting, Sign-up Forms, Library, Social, Integrations, Website, Contact Us, Help, and a user profile for Veronica. The main content area is titled 'Sign-up Forms' and features a central icon of a sign-up form with a 'SIGN UP!' button. Below the icon is the text: 'Easily gather information from the new contacts with pop-up, inline, or landing page sign-up forms.' A 'Create Sign-up Form' button is positioned below the text. At the bottom, there are four featured sections: 'OptinMonster' (Get more subscribers and increase sales with sign-up), 'Basic Landing Pages' (You can still edit existing landing pages with this legacy feature and explore), 'Facebook Lead Ads' (Capture the attention of future customers by creating a Facebook Lead), and 'Facebook Join My List App' (Give your followers an easy way to sign up with our Join My List app).

Constant Contact

- Select Inline

Select a sign-up form type



The screenshot shows a selection interface for sign-up form types. It features a header bar with the text 'Select a sign-up form type' and a close button (X). Below the header are four cards, each representing a different form type. The 'Lead Generation Landing Page' card is highlighted with an orange 'New' badge. Each card includes a small icon representing the form type and a brief description.

Form Type	Description
Pop-up	Display a pop-up form that prompts visitors to sign up.
Inline	Insert a form in the perfect spot on your site.
Lead Generation Landing Page	Customizable landing page for generating new leads through social media and email.
Facebook Lead Ad	Create a Facebook ad to reach new audiences.

Constant Contact

- Customize the form and publish it.

COVID-19 Campaigns Contacts Reporting **Sign-up Forms** Library Social Integrations Website Contact Us Help Stephani

Inline Form Created 2020/08/29, 10:20:47 AM Inactive Save Publish

Content Settings

Title >

Description >

Contact Fields >

Email Lists **Required** >

Button >

Background >

Sign up for updates!

Get news from Action Tax Relief in your inbox.

* Email

By submitting this form, you are consenting to receive marketing emails from: Action Tax Relief, 202 W Main St., Ste 203, Turlock, CA, 95380, US, <https://action-taxrelief.com>. You can revoke your consent to receive emails at any time by using the [SafeUnsubscribe@](#) link, found at the bottom of every email. [Emails are serviced by Constant Contact.](#)

Sign Up!

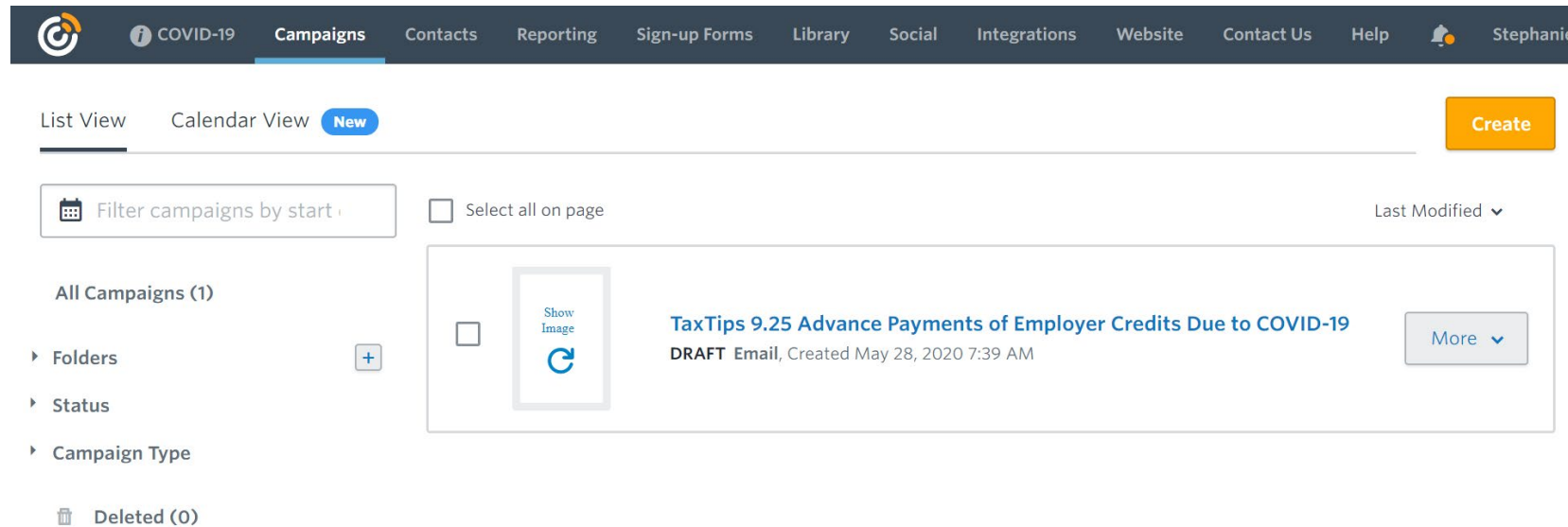
Constant Contact

Constant Contact

- Install the universal code and the inline code to your website
- Upload your lead magnet to your WordPress media library or to a folder on your website.
- Get the URL for the lead magnet:
 - <https://yourdomain.com/leadmagnet/leadmagnet.pdf>
 - You'll include this link in your welcome email so it's auto-delivered.

Constant Contact

- In Campaigns, create a welcome email



The screenshot displays the Constant Contact web interface. At the top, a dark navigation bar contains the logo and menu items: COVID-19, Campaigns (highlighted), Contacts, Reporting, Sign-up Forms, Library, Social, Integrations, Website, Contact Us, Help, and a user profile for Stephanie. Below the navigation bar, there are view options: List View (selected), Calendar View, and a New button. A Create button is also visible in the top right. A filter box on the left allows filtering campaigns by start date. A checkbox for 'Select all on page' is present. The main content area shows a list of campaigns under the heading 'All Campaigns (1)'. The first campaign is 'TaxTips 9.25 Advance Payments of Employer Credits Due to COVID-19', which is a DRAFT Email created on May 28, 2020 at 7:39 AM. A 'More' dropdown menu is next to the campaign name. On the left side, there are expandable sections for Folders, Status, and Campaign Type, and a Deleted (0) section at the bottom.

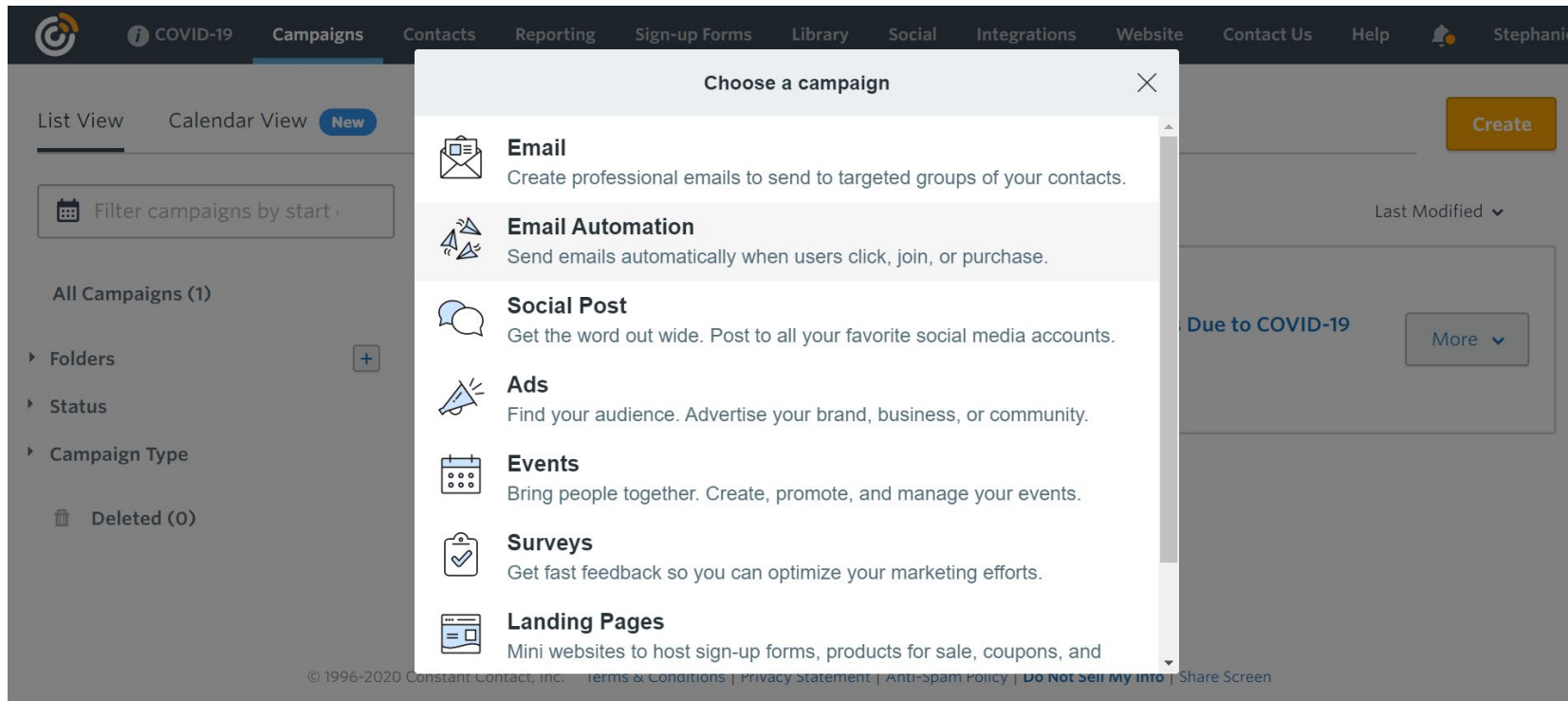
[Have Feedback?](#)

© 1996-2020 Constant Contact, Inc. [Terms & Conditions](#) | [Privacy Statement](#) | [Anti-Spam Policy](#) | [Do Not Sell My Info](#) | [Share Screen](#)



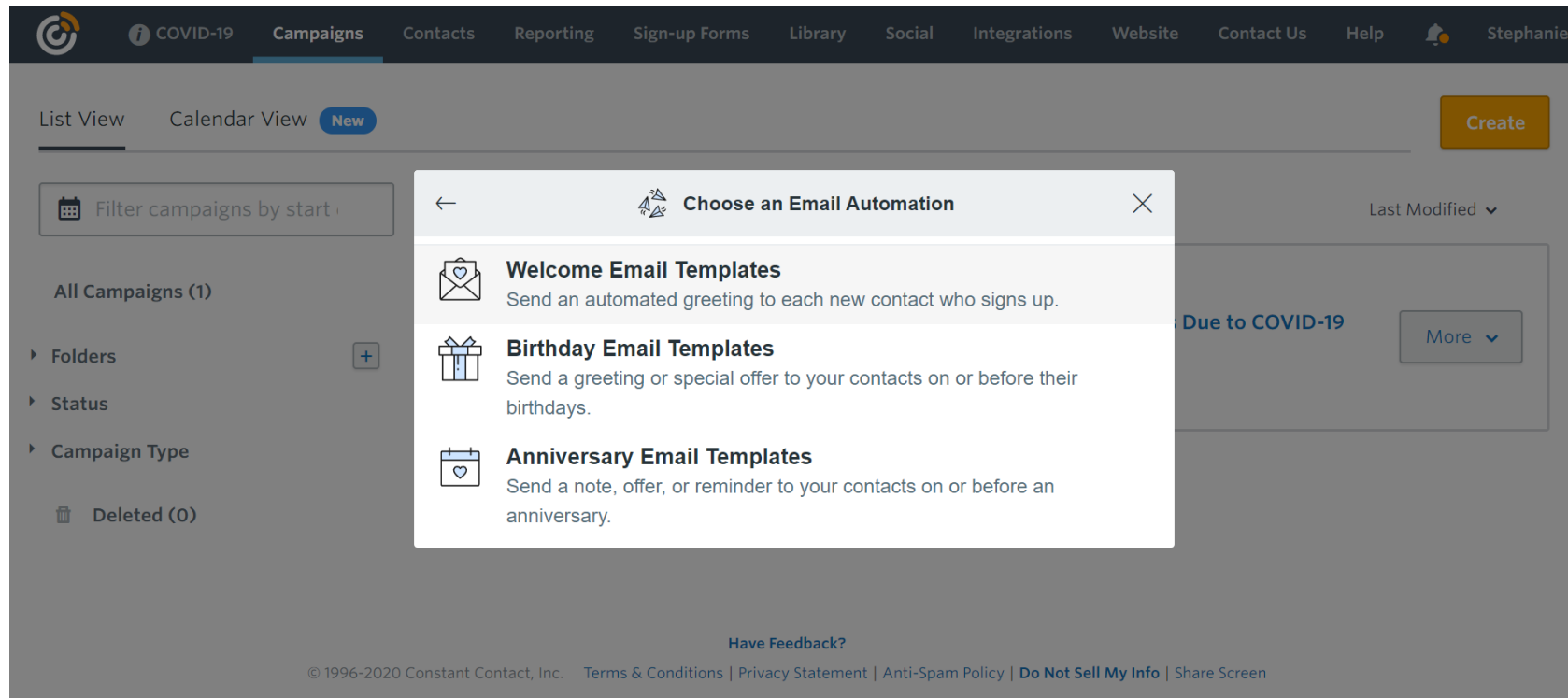
Constant Contact

- In Campaigns, click Create, Email Automation



Constant Contact

- Select Welcome Email Templates



The screenshot displays the Constant Contact dashboard. At the top, there is a navigation bar with the following items: COVID-19, Campaigns (selected), Contacts, Reporting, Sign-up Forms, Library, Social, Integrations, Website, Contact Us, Help, and a user profile for Stephanie. Below the navigation bar, there are view options: List View (selected), Calendar View, and a New button. A search bar is present with the text 'Filter campaigns by start'. On the left side, there is a sidebar with 'All Campaigns (1)', 'Folders', 'Status', 'Campaign Type', and 'Deleted (0)'. The main content area shows a campaign card titled 'Due to COVID-19' with a 'More' dropdown menu. A modal dialog box titled 'Choose an Email Automation' is open in the center, listing three options: 'Welcome Email Templates' (Send an automated greeting to each new contact who signs up.), 'Birthday Email Templates' (Send a greeting or special offer to your contacts on or before their birthdays.), and 'Anniversary Email Templates' (Send a note, offer, or reminder to your contacts on or before an anniversary.). At the bottom of the dashboard, there is a 'Have Feedback?' link and a footer with copyright information: © 1996-2020 Constant Contact, Inc. | Terms & Conditions | Privacy Statement | Anti-Spam Policy | Do Not Sell My Info | Share Screen.

Constant Contact

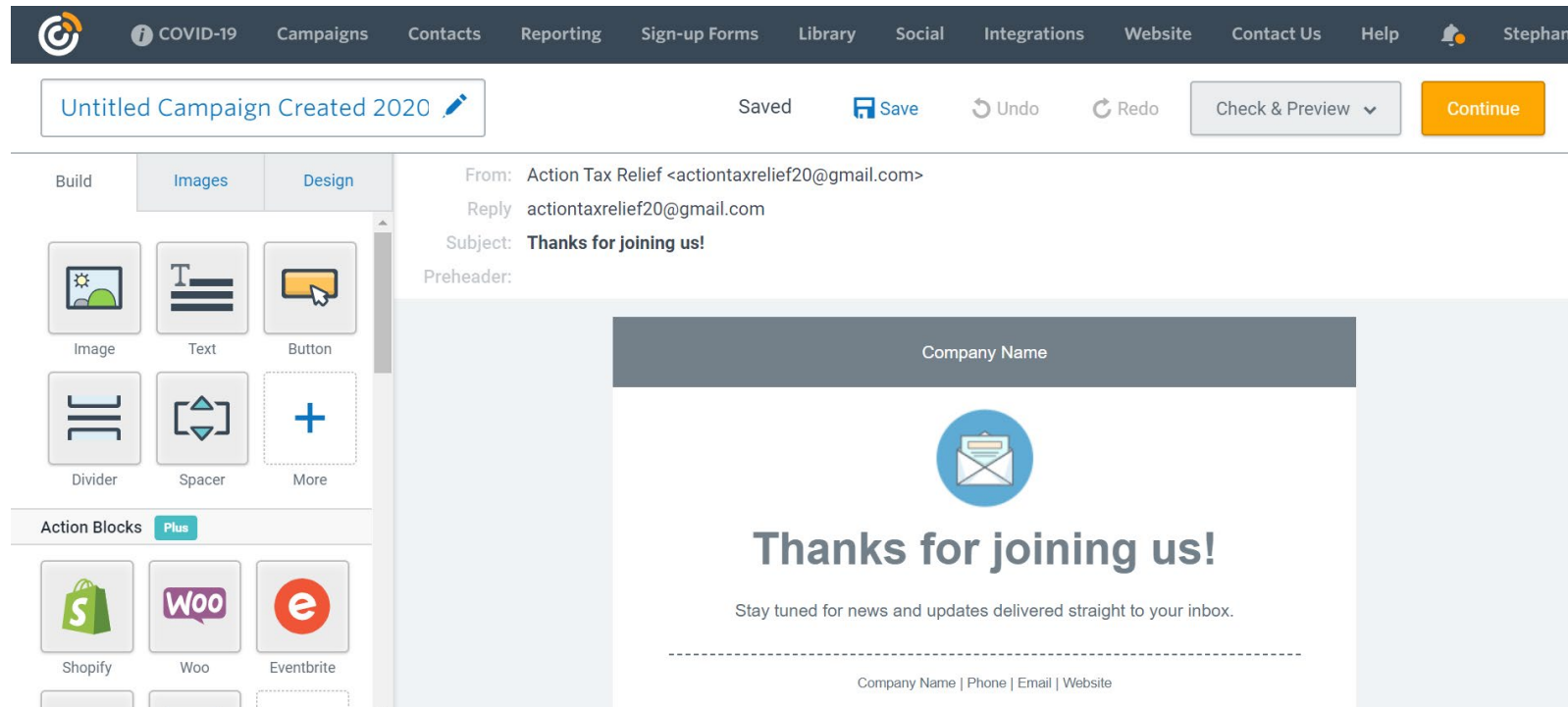
- Choose and customize a template

The screenshot shows the Constant Contact website interface. At the top is a dark navigation bar with a logo on the left and menu items: COVID-19, Campaigns, Contacts, Reporting, Sign-up Forms, Library, Social, Integrations, Website, Contact Us, Help, and a user profile 'Stephani'. Below the navigation bar is a white section titled 'Select a template'. Underneath this title is a search bar with a magnifying glass icon and the text 'Start typing keywords here to search'. Below the search bar, four email templates are displayed in a row:

- Template 1:** Valley Realty. Features a house image, the word 'Welcome' in a script font, and a photo of a man in a suit. Text includes: 'We are excited that you have subscribed to our email community! Throughout the year we will be sending you the latest MARKET TRENDS, PROPERTY LISTINGS, MAINTENANCE TIPS, ETC. to keep you in the know and try to make your life simpler.' and 'Are you ready for some valuable information right now? DOWNLOAD LATEST MARKET REPORT, THINGS TO DO IN REGION, ETC.'
- Template 2:** SHOPNAME. Features a blue banner with 'Welcome to the team' and a handshake icon. Text includes: 'The best welcome emails are friendly, helpful, and to the point. Introduce your brand and what readers can expect from future emails.' and 'Need ideas? Use the 1-1-1 formula. Call out three actions the reader can take to engage with your brand. They can cover things like: Point of contact info in case the reader needs help with your products or services, Social media profiles to connect with your business community, Free resources, like a whitepaper or how-to guide.'
- Template 3:** Features a wooden sign that says 'Welcome' hanging on a blue wooden wall. Text includes: 'Never miss another deal' and 'The most successful welcome emails are super short yet full of benefits. Offering a percentage discount or free shipping as a thanks for joining your list is always a great idea, along with including links to your social profiles.' and a 'Shop Now' button.
- Template 4:** -MEDITATION- SPIRITUAL EXERCISE. Features a star logo and a photo of a building. Text includes: 'We're so glad you've joined our community', 'Thank you for subscribing and welcome to [PARISH/ORGANIZATION NAME]', and 'We look forward to answering your questions, sharing stories.'

Constant Contact

- Choose and customize a template



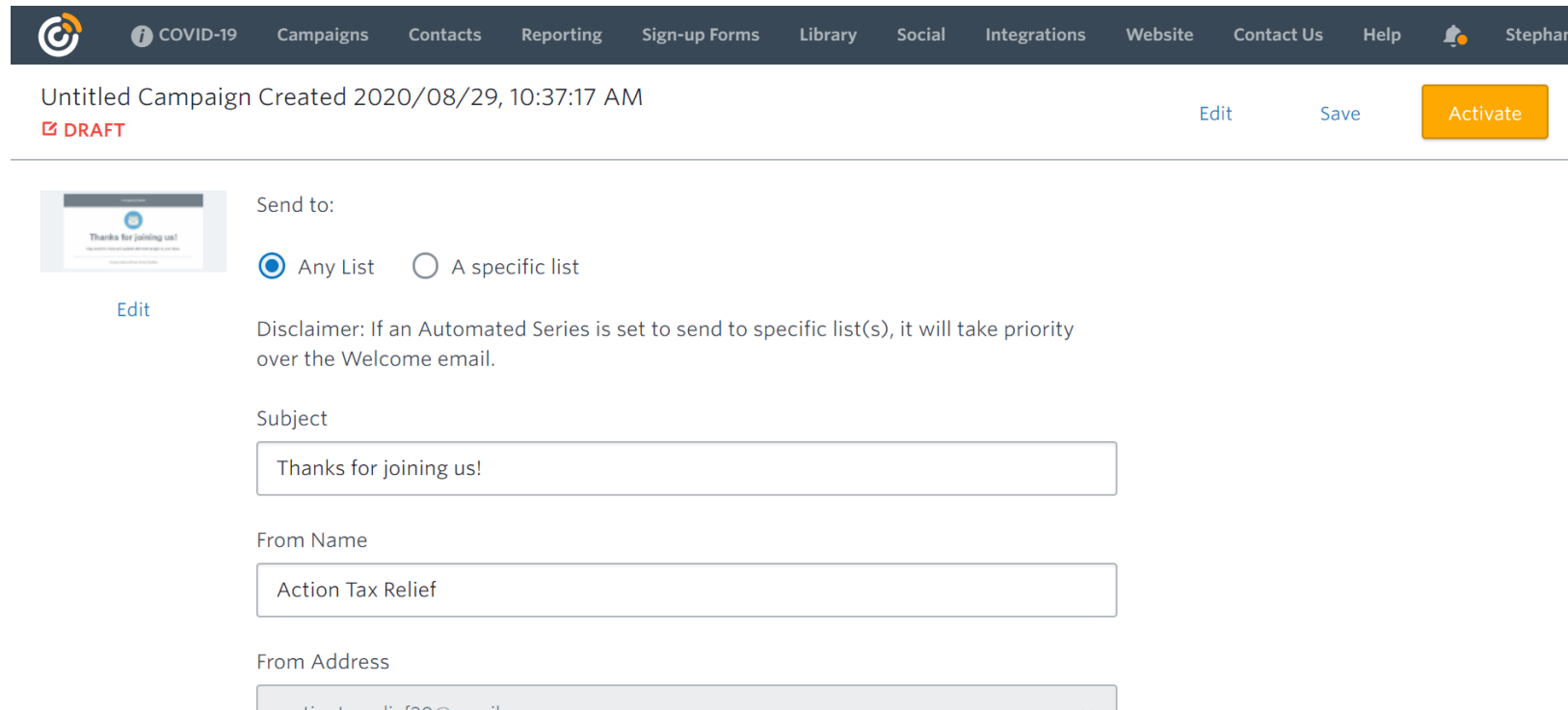
Constant Contact

- Add the link to your lead magnet here. "Here's your free report. [link]."

The screenshot displays the Constant Contact email editor interface. At the top, a navigation bar includes links for COVID-19, Campaigns, Contacts, Reporting, Sign-up Forms, Library, Social, Integrations, Website, Contact Us, Help, and a user profile for Stephanie. Below the navigation bar, the editor title is 'Untitled Campaign Created 2020'. To the right of the title are buttons for 'Saved', 'Save', 'Undo', 'Redo', 'Check & Preview', and 'Continue'. The left sidebar contains a 'Build' menu with options for 'Images' and 'Design'. Under 'Images', there are icons for 'Image', 'Text', and 'Button'. Under 'Design', there are icons for 'Divider', 'Spacer', and 'More'. Below the 'Build' menu is the 'Action Blocks' section, which includes icons for 'Shopify', 'Woo', and 'Eventbrite'. The main editor area shows the email content. The header includes 'From: Action Tax Relief <actiontaxrelief20@gmail.com>', 'Reply: actiontaxrelief20@gmail.com', and 'Subject: Thanks for joining us!'. Below the header is a 'Preheader' section. The main body of the email features a dark grey header with 'Company Name', a blue envelope icon, and the text 'Thanks for joining us!'. Below this is the text 'Stay tuned for news and updates delivered straight to your inbox.' and a dashed line. At the bottom, there is a footer with 'Company Name | Phone | Email | Website'.

Constant Contact

- Select the list it should be sent to and Activate the email



The screenshot shows the Constant Contact email editor interface. At the top, there is a navigation bar with the following items: COVID-19, Campaigns, Contacts, Reporting, Sign-up Forms, Library, Social, Integrations, Website, Contact Us, Help, and a user profile for Stephani. Below the navigation bar, the email title is "Untitled Campaign Created 2020/08/29, 10:37:17 AM" and it is marked as a "DRAFT". There are three buttons: "Edit", "Save", and "Activate".

The main content area includes a preview of the email with the subject "Thanks for joining us!". Below the preview, there are radio buttons for "Send to:" with "Any List" selected and "A specific list" unselected. A disclaimer states: "Disclaimer: If an Automated Series is set to send to specific list(s), it will take priority over the Welcome email." Below this, there are input fields for "Subject" (containing "Thanks for joining us!"), "From Name" (containing "Action Tax Relief"), and "From Address" (containing "actiontaxrelief@accele.com").

Constant Contact

- You don't need any web pages for Constant Contact.
- You could do a dedicated web page to put the inline code.
- You don't need a thank you or a confirm.
- You also don't need a confirm email.

Aweber

- Set up your thank you page on your website.
 - There should be a link to the lead magnet.
 - Note the URL

AWeber

- Log in and Select Sign-Up Forms

Active List: Full List of Subscribers

Manage Lists Integrations Help

Sandra L Leyva Inc
purchases@sandismith.com

Dashboard Messages Subscribers **Sign Up Forms** Landing Pages Reports List Options

ⓘ Your emails could get higher opens and clicks with [Custom DKIM](#). Setup custom DKIM for free in [Domains and Addresses](#) today! ✕

Sign Up Forms

Add subscribers to your list with a sign up form.

[Create a Sign Up Form](#)

Name	Type	Displays	Submissions	Conversion Rate
Websamples Form Edit Preview Publish Delete Reset Stats Copy	inline	4,313	371	8.6%

Other ways to collect subscribers

AWeber

- Customize the form

The screenshot shows the AWeber 'Design' interface for customizing a form. The top navigation bar includes 'Active List: Full List of Subscribers', 'Dashboard', 'Messages', 'Subscribers', 'Sign Up Forms', 'Landing Pages', 'Reports', 'List Options', 'Manage Lists', 'Integrations', 'Help', and 'Sandra L. Leyva Inc.'. A green banner below the navigation bar states: 'Your emails could get higher opens and clicks with Custom DKIM. Setup custom DKIM for free in Domains and Addresses today!'. The main heading is 'Design' with the subtext 'Customize the look and style of your form.' and navigation buttons for 'Design', 'Settings', and 'Publish'. On the left, there are sections for 'Add Fields' (with input fields for Company, Name, and US Address), 'Create a New Custom Field', and 'Form Automation' (with a text area for tags). The central 'Template Gallery' shows various form styles like 'Sale', 'Bright', 'Diagonal', 'Shadow', and 'Simple'. Below that, the 'Elements' section includes 'Header', 'Footer', 'Privacy', 'Counter', 'Powered By', 'Add Image', 'Add Divider', and 'Add Text'. A configuration bar shows 'Form Type', 'Type: In-Line', 'Width: 225 px', 'Pop-up Behavior: Default', and 'Recurrence: Always Display'. The main preview area shows a form with 'Name:' and 'Email:' fields, a 'Submit' button, and a footer with 'We respect your email privacy. Powered by AWeber Email Marketing'. At the bottom right, there are 'Save Your Form' and 'Go To Step 2' buttons.

AWeber

- Customize the settings including adding your URL to your thank you page

The screenshot shows the AWeber 'Settings' page for a form named 'My Web Form'. The page is divided into sections for 'Basic Settings' and 'Advanced Settings'. The 'Basic Settings' section includes fields for 'Form Name' (My Web Form), 'Thank You Page' (Basic Version), 'Open this in a new window' (checkbox), 'Already Subscribed Page' (Basic Version), 'Ad Tracking' (My_Web_Form), and 'Start On Message' (Welcome Message (1st Follow Up)). There are 'Save Your Form' and 'Go To Step 3' buttons at the bottom. A note at the bottom of the page states: 'Have an integration with a website builder like Weebly or WordPress? You're all set! Head back to that site to complete the configuration.'

Full List of Subscribers

Dashboard Messages Subscribers Sign Up Forms Landing Pages Reports List Options

Manage Lists Integrations Help

Your emails could get higher opens and clicks with Custom DKIM. Setup custom DKIM for free in Domains and Addresses today!

Settings

Edit your form's properties and choose a thank you page.

Design Settings Publish

Basic Settings

Customize your forms properties.

Form Name:
My Web Form

Thank You Page:
Basic Version Preview

Open this in a new window

Already Subscribed Page:
Basic Version

Hide Advanced Settings

Ad Tracking:
My_Web_Form

Start On Message:
Welcome Message (1st Follow Up)

Save Your Form Go To Step 3

Have an integration with a website builder like Weebly or WordPress? You're all set! Head back to that site to complete the configuration.

AWeber

- Customize the settings including adding your URL to your thank you page

The screenshot shows the AWeber 'Settings' page for a form named 'My Web Form'. The page is titled 'Settings' and includes a sub-header 'Edit your form's properties and choose a thank you page.' Below this, there are three tabs: 'Design', 'Settings' (which is active), and 'Publish'. The 'Basic Settings' section is expanded, showing the following fields and options:

- Form Name:** My Web Form
- Thank You Page:** Basic Version (with a 'Preview' button)
- Open this in a new window
- Already Subscribed Page:** Basic Version
- Hide Advanced Settings
- Ad Tracking:** My_Web_Form
- Start On Message:** Welcome Message (1st Follow Up)

At the bottom of the form settings, there are two buttons: 'Save Your Form' and 'Go To Step 3'. Below the form settings, there is a note: 'Have an integration with a website builder like Weebly or WordPress? You're all set! Head back to that site to complete the configuration.'

AWeber




- Publish your form

Publish

Place your form on your site.

Design Settings **Publish**

Who Will Publish This Form To Your Website?

-  **I Will Install My Form**
You are comfortable with HTML and have access to edit your pages
-  **My Web Designer Will Install My Form**
Send an email to your designer containing the HTML and the instructions they need
-  **Use My Form as a Landing Page**
Link to a page that has my form

AWeber

- Publish your form

Publish

Place your form on your site.

Design

Settings

Publish

Who Will Publish This Form To Your Website?



I Will Install My Form

You are comfortable with HTML and have access to edit your pages

Javascript Snippet

The Quick and Easy Version

Raw HTML Version

Advanced Design Customization

Recommended

- If you change your form here, you won't have to update your website.
- Track statistics in your account.

You can paste the snippet below anywhere between the body tags of your website:

```
<div class="AW-Form-356213040"></div>
<script type="text/javascript">(function(d, s, id) {
  var js, fjs = d.getElementsByTagName(s)[0];
  if (d.getElementById(id)) return;
  js = d.createElement(s); js.id = id;
  js.src = "//forms.aweber.com/form/40/356213040.js";
```



My Web Designer Will Install My Form

Send an email to your designer containing the HTML and the instructions they need



Use My Form as a Landing Page

Link to a page that has my form

AWeber

- This is the default confirmation page.

You're Almost Done - Activate Your Subscription!

You've just been sent an email that contains a **confirm link**.

In order to activate your subscription, check your email and click on the link in that email. You will not receive your subscription until you **click that link to activate it**.

If you don't see that email in your inbox shortly, fill out the form again to have another copy of it sent to you.

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[No Spam Policy](#) & [Privacy Policy](#)

AWeber

- Add the code to your website for the opt-in page

AWeber

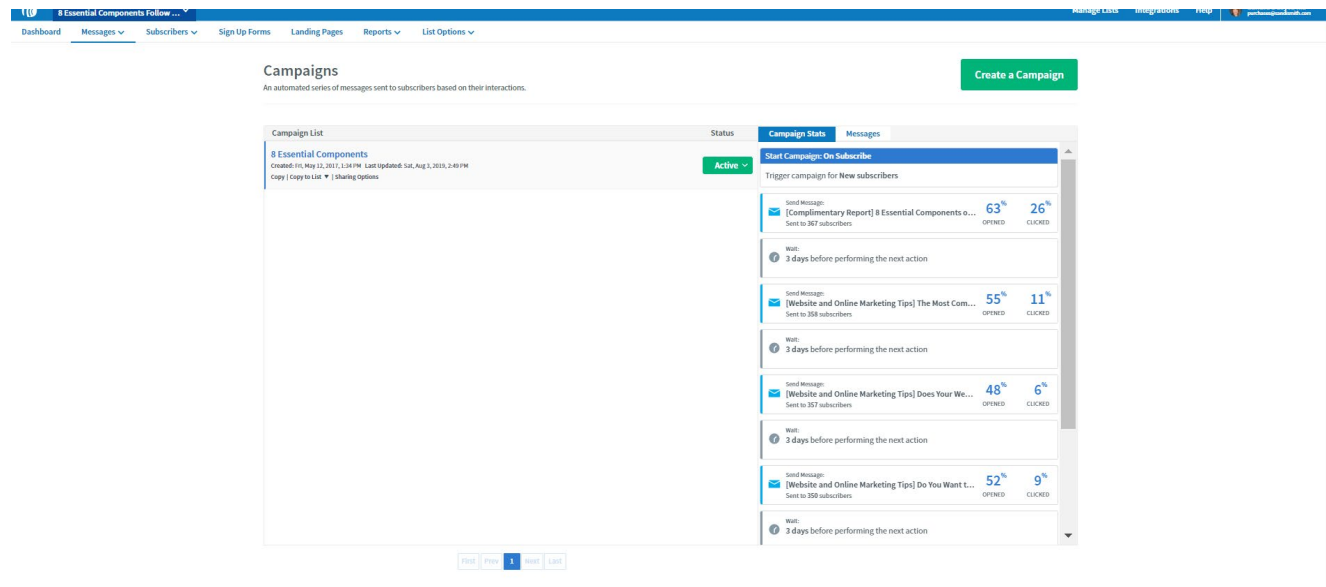
- Select the correct list. In Messages, select Campaigns

The screenshot displays the AWeber 'Campaigns' management interface. At the top, there is a navigation bar with options like 'Dashboard', 'Messages', 'Subscribers', 'Sign Up Forms', 'Landing Pages', 'Reports', and 'List Options'. A 'Create a Campaign' button is visible in the top right. The main content area is titled 'Campaigns' and includes a sub-header 'An automated series of messages sent to subscribers based on their interactions.' Below this, there is a 'Campaign List' section showing a table with columns for 'Status' and 'Campaign Stats'. The first entry is '8 Essential Components', which is 'Active'. To the right of the list, a 'Messages' pane shows a sequence of four messages sent to subscribers, each with its own 'OPENED' and 'CLICKED' percentages and a 'Wait: 3 days before performing the next action' instruction.

Campaign List	Status	Campaign Stats	Messages
8 Essential Components Created: Fri, May 12, 2017, 1:34 PM Last Updated: Sat, Aug 2, 2015, 2:49 PM Copy Copy to List Sharing Options	Active		Start Campaign: On Subscribe Trigger campaign for New subscribers
			Send Message: [Complimentary Report] 8 Essential Components o... Sent to 367 subscribers 63% OPENED 26% CLICKED
			Wait: 3 days before performing the next action
			Send Message: [Website and Online Marketing Tips] The Most Com... Sent to 358 subscribers 55% OPENED 11% CLICKED
			Wait: 3 days before performing the next action
			Send Message: [Website and Online Marketing Tips] Does Your We... Sent to 357 subscribers 48% OPENED 6% CLICKED
			Wait: 3 days before performing the next action
			Send Message: [Website and Online Marketing Tips] Do You Want L... Sent to 350 subscribers 52% OPENED 9% CLICKED
			Wait: 3 days before performing the next action

AWeber

- Create your new campaign, which is the email delivery of multiple emails when someone subscribes.



The screenshot displays the AWeber 'Campaigns' management interface. At the top, there is a navigation bar with options like 'Dashboard', 'Messages', 'Subscribers', 'Sign Up Forms', 'Landing Pages', 'Reports', and 'List Options'. A 'Create a Campaign' button is visible in the top right. The main content area is titled 'Campaigns' and includes a sub-header 'An automated series of messages sent to subscribers based on their interactions.' Below this, a 'Campaign List' table shows details for a campaign named '8 Essential Components'. The campaign is 'Active' and includes a 'Messages' column with a list of individual email messages. Each message entry shows the subject, the number of subscribers it was sent to, and its performance metrics for 'OPENED' and 'CLICKED' rates. For example, the first message, '[Complimentary Report] 8 Essential Components o...', was sent to 347 subscribers, with a 63% open rate and a 26% click rate. Subsequent messages show similar data points, with wait times of '3 days before performing the next action' between each message.

Message	OPENED	CLICKED
[Complimentary Report] 8 Essential Components o... Sent to 347 subscribers	63%	26%
Wait: 3 days before performing the next action		
[Website and Online Marketing Tips] The Most Com... Sent to 358 subscribers	55%	11%
Wait: 3 days before performing the next action		
[Website and Online Marketing Tips] Does Your We... Sent to 357 subscribers	48%	6%
Wait: 3 days before performing the next action		
[Website and Online Marketing Tips] Do You Want t... Sent to 350 subscribers	52%	9%
Wait: 3 days before performing the next action		

Infusionsoft

- Log in and go to Campaign Builder

Infusionsoft by Keap

Find a contact...

Campaign Builder Email & Broadcasts Lead Generation Templates Dynamic Content Legacy Reports Settings

Campaigns Find the right campaign Create your own

Search Search Category Show all categories Manage Categories

Actions

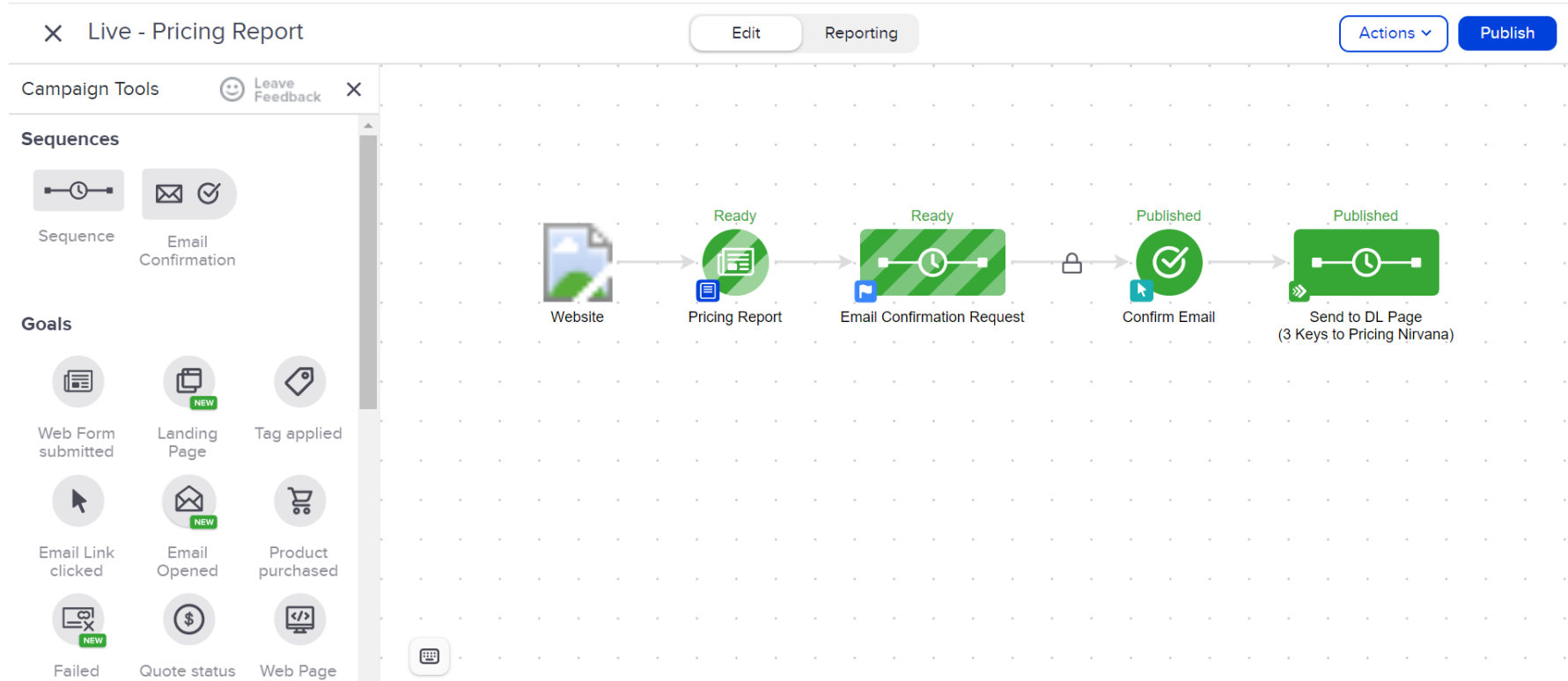
231 results 50 per page

<input type="checkbox"/>	Id ↓	Name	Categories	Active Contacts	Published Date	Published By
<input type="checkbox"/>	2182	Participant Dif from Order Name -Bradley Burnett 20200925 Cases and Examples 7		0	8/26/2020 12:51 PM	Marjory Rase
<input type="checkbox"/>	2178	Participant Dif from Order Name -Bradley Burnett 20200923 Forgiveness Form 8		0	8/27/2020 11:46 AM	Marjory Rase
<input type="checkbox"/>	2174	Webinar with Bradley Burnett 20200925 Cases and Examples 7		0	8/26/2020 12:45 PM	Marjory Rase

12

Infusionsoft

- Here is a look at an opt-in campaign



Automation Software

- [Optinmonster.com](https://www.optinmonster.com)
- [Clickfunnels.com](https://www.clickfunnels.com)
- **GetResponse.**
- **Unbounce.**
- **Instapage.**
- **HubSpot Marketing Hub.**