



Marketing Automation Checklist

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Creator of the

MarketingAutomationPlanner.com



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MANY SMART PEOPLE WENT INTO MAKING THIS HAPPEN.

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Based on a work at <https://get.caelanhuntress.com/leads/>



Step 1: Lead Generation

- 1. **Lead Magnet** targeted to your future customer
This digestible, bite-sized info-snack can solve a simple problem, and the topic should be the kind of thing people are always asking you, or something you are constantly having to explain.
- 2. **Call-to-Action** that you can copy-paste anywhere
Your Calls-to-Action should clearly describe the benefits of getting your Lead Magnet, in terms of Outcomes, Benefits, Time, and Money.
- 3. **Landing Page** for driving traffic
This simple destination URL should be a simple page with only 1 CTA: subscribe to get this.
- 4. **Pop-up** on your website
It's a tragic fact that pop-ups convert better than other CTAs, so if you're going to build your list, you need a pop-up on your website for maximum effectiveness.

Step 2: Nurture Sequence

- 5. **Thank-you page** to deliver the Lead Magnet
Once they have confirmed their email address, give them what you promised, and make an OTO or One-Time Offer. Sell something to them right away, to get them familiar with hearing sales messages from you.
- 6. **Email Onboarding** automated through an ESP (Email Service Provider)
After subscribing to get your Lead Magnet, maybe they get a regular newsletter from you, and maybe they don't. What is important is that they are sent a series of emails that introduce them to who you are, what you do, why you're amazing, and what they can buy from you.
- 7. **Build Know, Like, and Trust** to deepen your relationship
Use your Greatest Hits for your newest subscribers: your most popular articles, your best pieces of writing, and any content that you have already produced that would be useful for new subscribers to read. It takes 7-11 contacts to make a sale, so get a few in your onboarding.
- 8. **Case Studies and Testimonials** for your work
Describe the Problem, Aim, and Solution, to help your future customer see themselves in someone who faces the same problems, and back it up with a Testimonial from your customer. Need more testimonials? Just go here: <https://testimonials101.com>

Step 3: Conversion

- 9. **Tripwire Product** to segment your subscribers from your buyers
This is a small, inexpensive solution to a moderately complicated problem. Typical prices range between \$7-24, and studies show that offering a Tripwire can increase later conversions by 10x.
- 10. **Fast Action Coupon** for acting right now
Offer a time-based discount in your email onboarding sequence, to encourage people to think in terms of buying from you when you offer something. Set an anchor price on your Tripwire for \$47, and then offer a coupon to purchase it for \$7.
- 11. **Email segmentation** for different subscribers
If someone is willing to buy from you, tag them in your ESP, and give them more sales messages than your general email list.
- 12. **Tracking Measurement** to measure what's working and what's not
Set your links to carry UTM parameters, and then you can track which campaigns are bringing you subscribers and customers in Google Analytics. If you need an easy way to create and track your UTM links, [use this template](#).

Step 4: Spotlight Offer

- 13. **High-ticket offer** providing a package of your services or products
Even if you sell services by the hour, or individual products, create a premium package that has it's own name, price, time, and outcome.
- 14. **Defined time to completion** for your Spotlight Offer
Your customer should know precisely how long your Spotlight Offer will take, so they know the investment of time (as well as money) that this offer requires.
- 15. **List of Outcomes and Benefits** for your customer
*Don't just talk about your Signature Offer in terms of what **you can do** for your customer; your customer is much more interested in hearing the **benefits they gain** from working with you.*
- 16. **Sales page** describing all of the details
Even if you close over the phone, you should have a standalone sales page that contains everything your customer needs to know to make a buying decision. Give it a simple URL like [yourwebsite.com/offer](#) so you can give the link to someone in an instant.

Please note: All of this takes work.

Many of the items in the Marketing Automation Checklist will take time, tech, and guidance to create. Helping people set up their evergreen funnels is something I do in my online video course, the Marketing Automation Planner.



How do you set up all of this tech?

Let's face it, managing the marketing technology can be a headache. All you want to do is create, write, or record your content. However, you spend so much time wrestling with your email system, trying to get it to do something simple, that it can waste half a day. This depletes the creative energy you need for actually showing up for your customers.

You want to be sure that the time you spend marketing yourself is profitable, and not a waste of time. Spend some time in my program, and I'll make sure every hour you spend marketing yourself in the future is more effective, profitable, and worthwhile. If you are willing to communicate with your audience, and provide them value, your systems can build your list and bring you customers who are ready to buy, automatically.

What is in the program?

There are 4 modules to the Marketing Automation Planer:

Module 1: Opt-In Options

Module 2: Your Welcome Email

Module 3: The Thank-You Page

Module 4: Email Onboarding Series

Who Is This Program For?

- Entrepreneurs without a marketing department
- Freelancers who feel like the 'best kept secret'
- Solopreneurs who have to manage their own marketing
- Content creators who want to build their audience and expand their reach
- People who don't want to be selling, but want their systems to do the selling for them

This Program Contains:

- Google Doc Workbooks to simplify your content creation
- Copywriting templates to accelerate your production process
- Short instructional videos providing step-by-step instructions
- Case studies of successful landing pages, emails, and thank-you pages to study
- Show-and-Tell community where you can show off your work and get feedback

Real Life Story:



"This program has massively changed my business. I find that it's all too easy to put aside the crappy work, but it's easy to get it done with other people. Each week Caelan had a workbook, or a spreadsheet, or a template that helped me do the challenging foundational work that nobody else can do but me, and now, I have a stream of new clients coming to me because of what I've accomplished in this program." - Erin Donley

About Caelan Huntress

I help entrepreneurs and experts grow their business with smart marketing systems.

For the past ten years I've been an entrepreneur, as a website designer, sales funnel strategist, and marketing copywriter. I've worked with hundreds of entrepreneurs on their digital marketing, their business models, and their sales funnels. I run a digital marketing agency called Stellar Platforms, and I am an author, speaker, and virtual trainer, and I live with my wife and three children in New Zealand.



My **keynote topics** include marketing, sales, accessibility, and digital technology. In addition to my **training programs**, I offer 3-month **coaching packages**, as well as ongoing consulting packages for a select number of clients each year.

You can read my case studies at <https://stellarplatforms.com/case-studies/>, find my writing at <https://caelanhuntress.com/>, or follow me on social media at:

- <https://www.twitter.com/caelanhuntress>
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