Course: The Automated Empire: Scale to 6-Figures on Autopilot

Lesson 5: Automating Your Lead Funnel

1. Core Concept & Learning Objective

Core Concept (148 words): A "leaky funnel" is the #1 silent killer of solo businesses. You spend time and money getting traffic to a lead magnet, but the "handoff" from your form (e.g., Typeform) to your email list (e.g., ConvertKit) is manual. This is a "leak." Leads get lost, follow-ups are late, and you lose trust instantly. This lesson plugs that leak forever. You'll build your first *critical* automation: the "Lead Capture Machine." This machine will instantly and automatically take a new lead from your sign-up form, add them to your email list, "tag" them based on *what* they signed up for, and deliver your lead magnet.

Learning Objective: By the end of this lesson, you will be able to **build** a 3-step automation that automatically "tags" a new lead, **delivers** your lead magnet, and **moves** their data from your landing page form to your CRM or email marketing system, ensuring 100% of your new leads are captured and nurtured instantly.

2. Interactive Content Activities

Activity 1: Case Study: "The 48-Hour 'Dead' Lead"

- **Type:** Case Study Analysis

- **Time:** 15 minutes

- **Instructions:**

  1. Read the scenario: "Founder Priya launches a new PDF guide. A potential client, 'David,' signs up on her website form at 8 PM on Friday. Priya doesn't check her form responses until Monday morning. She manually exports the CSV and imports it into Mailchimp. David finally gets the PDF 48 hours later, by which point he has forgotten he even signed up and marks it as spam."

2. In the text box, answer: "What is 'Speed-to-Lead' and why did Priya fail at it? What is the *real* damage done here (it's not just 'one lost lead')?"

- **Expected Outcome:** A deep understanding of "Speed-to-Lead" and how a manual process *destroys* trust and engagement from the very first interaction.

Activity 2: Tool Exploration: "Anatomy of a Smart Form"

- **Type:** Tool Exploration

- **Time:** 20 minutes

- **Instructions:**

  1. Log in to a free "smart form" tool (like Tally, Typeform, or even your email provider's built-in forms, like ConvertKit's).

  2. Create a simple 3-field sign-up form for a "free guide": `Name`, `Email`, and a *hidden* field.

  3. Find the "hidden field" feature. Add a hidden field called "LeadSource" and give it a default value of "MyWebsiteGuide."

  4. You will *not* see this field on the form, but the data *will* be captured.

- **Expected Outcome:** The "a-ha" moment of hidden fields—the key to "tagging" leads automatically. You now know *how* this lead signed up, which is critical data.

Activity 3: "Map Your 'Tagging' System" (Peer Collaboration)

- **Type:** Peer Collaboration / Discussion

- **Time:** 15 minutes

- **Instructions:**

  1. "Tagging" is how you segment your list. A lead who downloaded a "Pricing Guide" is very different from one who downloaded a "Beginner's Guide."

  2. Go to the community discussion board.

  3. **Post:** "I have two lead magnets (or I *will* have): 1. [Lead Magnet 1] and 2. [Lead Magnet 2]. What 'tags' should I give these leads?"

  4. *Example:* "1. My '50 Social Media Prompts' PDF. 2. My 'Pricing Guide for Services.' Tag ideas: `Tag: SM-Prompts` and `Tag: Hot-Lead-Pricing`."

5. Reply to one other student's post and suggest a tag for them.

- **Expected Outcome:** A clear strategy for list segmentation (tagging), which is the foundation of advanced, personalized email automation (Lesson 8).

3. Assignment & Project Milestone

Assignment: The Automated Lead Magnet Machine (Component 5 of Final Project)

- **Estimated Time:** 90 minutes

- **Deliverable:** A short (1-2 min) screen-recording video (using Loom or similar) where you:

  1. Show your "live" sign-up form.

  2. Fill out the form as a "test" lead.

  3. Show your Zapier/Make automation *running* successfully.

  4. Show the new "test" lead *inside* your email provider (ConvertKit, Mailchimp) with the correct "tag" applied.

- **Description:** This is your first *mission-critical* automation. You will build a 2 or 3-step automation that connects your lead magnet form, your automation tool, and your email provider.

- **Step-by-Step Instructions:**

  1. **Your Stack:**

     - **Form:** Tally, Typeform, Google Forms, etc.

     - **Automation:** Zapier or Make.

     - **Email:** ConvertKit, Mailchimp, etc.

  2. **In your Email Tool:** Create a new "tag" (e.g., `Tag: LeadMagnet-Guide`). Set up an "automation rule" that says "When a subscriber is given this tag, send them the 'Welcome Email' with the PDF."

  3. **In Zapier/Make:** Create a new automation.

  4. **Trigger:** New Form Submission (from your form tool).

  5. **Action:** Add/Update Subscriber (in your email tool).

6. **Map the data:** Map the `Name` and `Email` fields. In the "Tags" field, type the *exact name* of the tag you created in Step 2 (e.g., `Tag: LeadMagnet-Guide`).

7. Test the automation by filling out your own form.

8. Record your Loom video showing the *entire process working* (Steps 1-4 of the deliverable). This is Component 5.

- **Connection to Final Project:** This is the "Lead Capture" module of your automated empire. You have now automated the *first* part of your "Lead-to-Client" process map from Lesson 2.

- **Evaluation Criteria:**

  - **Excellent:** The video is clear and shows all 4 steps: the form, the automation, and the correctly tagged lead in the email provider.

  - **Proficient:** The video shows 2-3 of the 4 steps, but it may miss showing the "tag" (the most important part).

  - **Needs Improvement:** The video is just a screenshot, or the automation doesn't work.

4. End-of-Lesson Assessment

(Multiple Choice 1) What is "Speed-to-Lead"?

- A. The amount of time it takes to build a lead magnet.

- B. The speed at which your website loads for a new lead.

- C. The time between a lead signing up and you delivering the value (the lead magnet).

- D. The time it takes a lead to become a paying client. *(Answer: C)*

(Multiple Choice 2) What is the *primary* purpose of "tagging" a new lead in your email system?

- A. To make your email list look more organized and professional.

- B. To "tag" them in a photo on Instagram.

- C. To segment your list so you know *what* they are interested in, allowing for personalized follow-up.

- D. To charge them the correct amount of money. *(Answer: C)*

(Multiple Choice 3) In the "Anatomy of a Smart Form" activity, what is a "hidden field" used for?

- A. To capture secret information about the lead, like their location.

- B. To pass "meta-data" (like "LeadSource: Website") to your automation without the user seeing it.

- C. To hide the form from users who are not logged in.

- D. To trick the user into giving you their phone number. *(Answer: B)*

(Multiple Choice 4) In the "48-Hour 'Dead' Lead" case study, the *biggest* damage Priya caused was:

- A. Wasting her own time on a Monday morning.

- B. Sending the email to the wrong person.

- C. Violating the lead's trust and getting marked as spam, which hurts her email deliverability.

- D. Forgetting to attach the PDF to the email. *(Answer: C)*

(Short Answer 1) In your assignment, what "tag" did you create for your new leads?

- *(Example Answer: I created the tag "Tag: New-Lead-Checklist".)*

(Short Answer 2) What is the *one* biggest "leak" in a lead funnel?

- *(Example Answer: The manual delay between someone signing up and someone (me!) adding them to the email list and sending the welcome email.)*

(Scenario-Based 1) You have two lead magnets: a "Monthly Budget Template" (for beginners) and a "Crypto Investing Guide" (for advanced users).

1. What two different "tags" would you create?

2. Why should you *not* send the same welcome email to both?

- *(Answer: 1. Tags:* `Tag: Budget-Template` *and* `Tag: Crypto-Guide`*. 2. They are at totally different stages. The 'Budget' person needs basic help, while the 'Crypto' person needs advanced tips. Sending them the same follow-up will feel impersonal and irrelevant.)*