

Overview of Your Build Phase



Congratulations! You have successfully completed the Intake Process. Now it's time for the Build Phase.

During this phase, your Client Success Manager will create all aspects of the funnel (outlined below). Your CSM will then have a Build Review Call with you where you will review everything that has been built, get to know your marketing automation platform, and learn how to build out those elements in your marketing automation platform.

Our hope is to guide you through this build in order to empower you to create more in the future. Below is an outline of what the Build Phase entails.

The Build Process

- Activation Email
- Main Offer
 - Landing Page
 - Form
 - Thank you Page
 - Auto-Responder Email
- Networking Landing Page with Form
- Education Offer
 - Landing Page
 - Form
 - Thank you Page
 - Auto-Responder Email
- Set up Workflows
- Send contact list through lead intelligence
- Upload Lists into Marketing Automation Platform
- Create Calls-To-Action (CTA"s)

Overview of Your 3 Funnels

1. The Main Offer Funnel

- a. Your Main Offer will be posted live on your website as a way to gather new contacts and leads. Your Main Offer Funnel is made up of the following parts:
 - i. Activation Email
 - 1. The activation email is sent out to your list of contacts to activate their lead scoring. When the contact opens the activation email, they are cookie'd, which allows us to track the contact's interaction with your website, offers, and emails from now on.
 - ii. Landing Page & Form
 - 1. Your landing page will describe your main offer in great detail. A form will capture the visitor's contact information.
 - iii. Thank You Page
 - 1. The Thank You Page thanks the contact for filling out the form and delivers your main offer.
 - iv. Auto Responder Email
 - 1. The Auto-Responder email is sent directly after a form submission to thank the visitor for their interest and provide the offer again via email.
 - v. Calls-to-Action
 - 1. A Call to Action starts the Conversion Process. Your visitors clicked on CTA's from your website, blogs, or emails. When they click on the CTA, they are directed to a landing page to fill out your form.

b. The Education Offer Funnel

- i. This funnel will be based off a short URL you can use while speaking at events. The Events Offer Funnel gives those in the audience a way to connect with you without having to personally meet you. You will use this landing page/form to collect lead information.

c. The Networking Funnel

- i. This is a landing page and form which will go with you to networking events to collect contact information from business cards. This will only be used internally as an organization.