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Collect and Consult

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How Does Collect and Consult Work?

This campaign is a great fit for businesses that sell products or services using some type of scheduled appointment/consultation. The strategy is to **use a lead magnet** to collect new leads and then drive them to a consultation. A lead magnet is any content—like an e-book, whitepaper, industry report, webinar, etc.—that helps your leads solve a real pain, which you offer free of charge in exchange for some the lead's contact information, usually a valid email address.

The objective is to post the lead magnet on your website along with a form people must fill out to download, and promote it on your social channels and your blog posts to give it as much buzz as you can. As your prospects download the lead magnet, you will make a follow-up offer via email for a consultation.

Example scenario:

Vaughn Studios has an e-book about the audio mastering process and what bands need to know to create a good recording. The studio hopes to book consultations for full-service album mastering services to people who download the guide. They know that people who download the e-book already want to know more about audio mastering and probably would need to work with a professional. Vaughn Studios wants to be the studio that they work with.

Full campaign process flow map

Request from prospect
Prospect requests free lead magnet via landing page

Lead magnet delivered
Deliver lead magnet via email; if no download, follow-up email is sent

Report downloaded

Education email follow up
Could be three-email series that ends when prospect takes action or all three emails are delivered

Phone number collected
Fill out webform to collect best phone number

Consultation call made

Step 1: Configure Free Lead Magnet Opt-in

In this step, you'll configure the mechanism for capturing leads, which includes a landing page for your lead magnet where people can download the content when they give you their email address. This action will then add them to the free lead magnet delivery email series.

Create a lead magnet

To start, you've got to have a great lead magnet that offers a little help on a pain point your customers experience. Remember, it's got to be worth downloading, so it needs more oomph than a blog post. It should be a significant length, say 2,500 words or more. It would benefit from a graphic designer to give it a professional look and feel, including graphic statistics, call outs, images, and other features to up the quality.

*For more on creating a lead magnet, see "***How to Create Lead Magnets: A Step-by-Step Guide***"*

Design your landing page

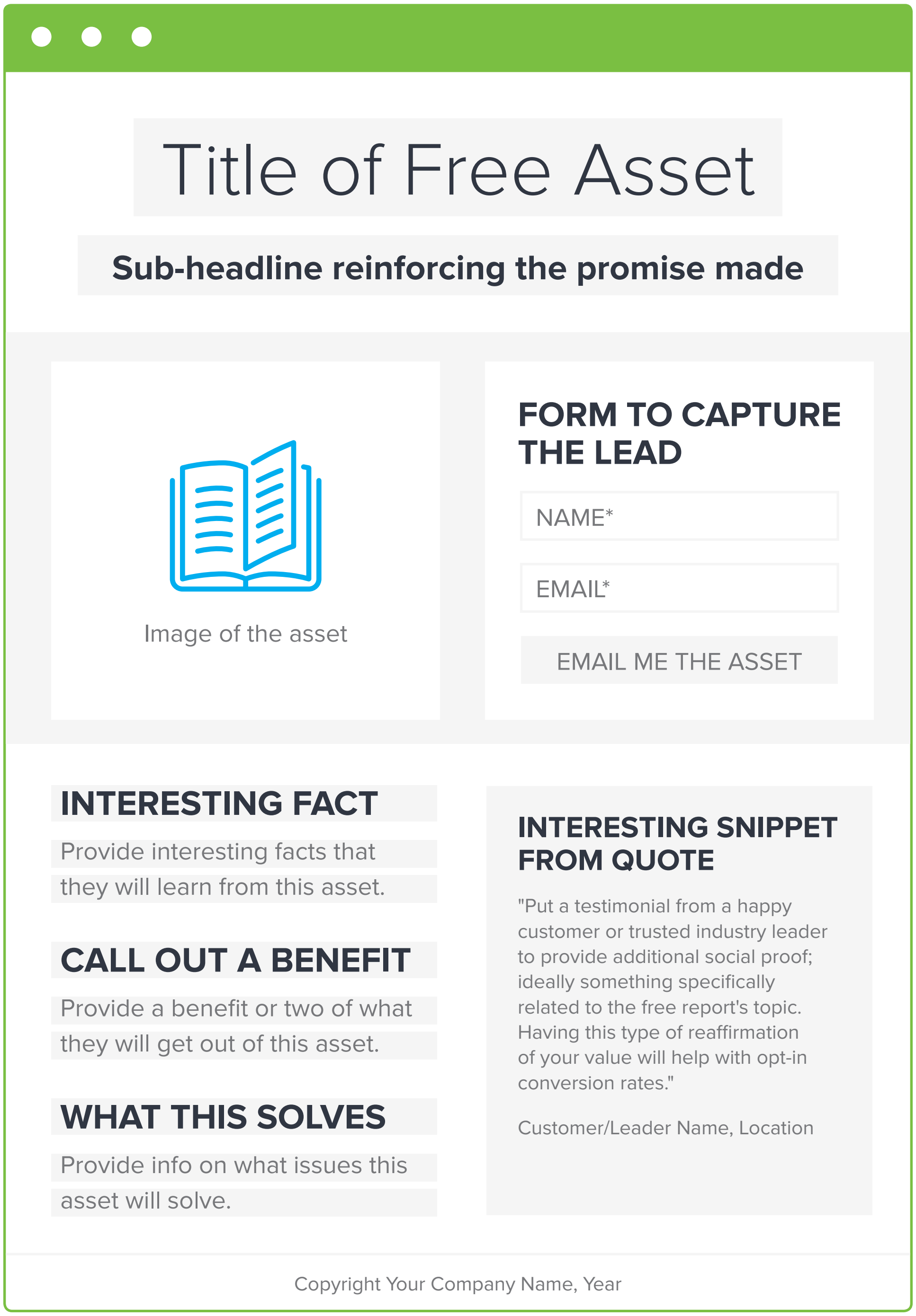
Once you've got an asset, you can set up a page for it to reside that includes a lead capture form. You can link to that page in social media promos, blog calls-to-action (CTAs), and separate email promotions/newsletters. You're proud of it, so you should talk about it as much as you can.

When your lead completes the form, it will trigger an email that delivers the lead magnet.

While your asset will be free of charge, you will still need to gate it. This means that if someone wants to download it, they have to give you some information. In this case, you'll ask for their email, since your goal is to use email eventually to offer them a free consultation.

We recommend that you ask for as little information as you need. If you ask for too much, you could scare your potential customer away; they could interpret your need for information as an intrusion or an unfair exchange for the download. To enter them in the campaign you really only need two very minimal bits of info: name (in fact, first name is generally enough) and email address.

Here's a suggestion for how your landing page could look:



Once you've set up the lead magnet, you're ready to make it work for you.

Step 2: Set Up Report Delivery Email Series

The lead trusted you with his email address, so you need to be certain to deliver exactly what you promised, in a timely manner. Your email should go out as instantly as possible so that he can read it right away.

How an email series works: The series is designed to reach a goal (in this case, deliver your lead magnet via email). Each email in the series serves as a follow up to the original offer, until the recipient reaches the goal. The series ends either when the goal is reached or when the last email in the series is sent.

This will be a two-email series. The first email thanks the prospect for downloading the attached or linked-to lead magnet. You'll need to ensure that the email system you're using tracks downloads so that A) you can know precisely how each recipient responds to your offer, and B) you can provide a follow up email if they do not download within a couple days.

The second email follows up in the case that the recipient did not download the lead magnet. The follow up needs to be timed so that the recipient has adequate time to open the first email and take action. We recommend a three-day delay between the first email and the follow up email. The follow-up email simply reminds the prospect that they may have missed the first email and brings your brand back to the top of their inbox. We do not recommend more than one follow-up email.

Below, we've provided templates to help get you started on the emails in this series:

Email No. 1: Thank you for your request, here's your lead magnet—to be sent within seconds of the request

Subject: **Here's your {NAME OF FREE ASSET} you requested!**

Hello {Contact.FirstName},

Thank you for requesting a copy of {NAME OF FREE ASSET}!

We know you are busy, but we hope you'll take a few moments to read and enjoy it as we know it will {main reason why someone needs to be reading this report}.

Download your report below:

LINK TO ASSET

Best,

{Company Signature}

Email No. 2: Reminder that we sent you our lead magnet—to be sent three days after email No. 1, but only if they did not respond to email No. 1.

Subject: **Wanted to make sure you received this...**

Hi there, {Contact.FirstName},

A few days ago, you requested our {lead magnet type; i.e. e-book, webinar, etc.}, "{lead magnet title}," and it looks like you haven't downloaded it yet. We just want to remind you that it's still available for download here:

LINK TO ASSET

Don't forget, {the most powerful learning objective from the landing page and why it matters to them}.

If you have any questions after reading, please hit reply and let me know!

Regards,

{Owner.FirstName} {Owner.LastName}

{Owner.Phone}

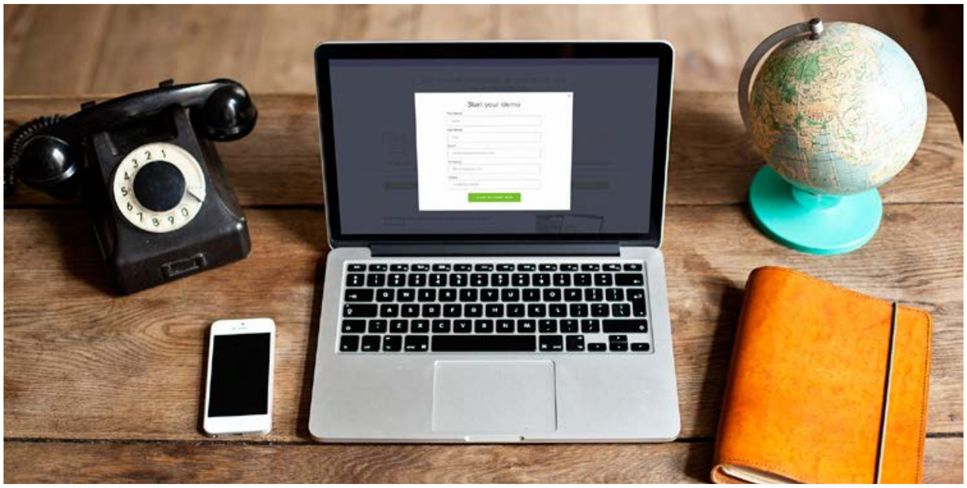
{Company}

Step 3: Prepare Educational Follow-up Email Series

You'll need to segment your list to capture all contacts that are flagged as having downloaded your asset. You can confidently assume A) that this set of contacts have the specific pain point you address in your asset, and B) they trust your brand to provide the solution. Based on that assumption, you can reasonably follow up on their download with an offer to further discuss their pain point and provide your services as a solution. Keep in mind the subject of the lead magnet and incorporate the pain it addresses into the emails. This provides a coherent message and shows increasing help.

Your follow-up email series will carefully pitch your consult request. This is the goal for your campaign, so you want to be sure to limit this pitch series to the segment that has downloaded the free lead magnet you sent. Those are your hottest leads that are most ready to close.

Additionally, it's crucial that you track each email to ensure that you remove them from the series when they reach the goal (give you their phone number for a consultation call).



You can use a webform link in your email series to help track who's requested a consultation. Your email will link to a webform where the recipient will input their phone number and request a consultation.

You can then cross-reference the email addresses that have requested a consultation with those of your list. Then, remove those names before you send your next batch of follow ups. (You don't want them to receive more emails urging them to call if they've already called.)

If you have CRM and marketing automation, you can set up the campaign to register contacts who reach the goal (purchase from the sale) and remove them from follow up emails automatically.

We recommend that this be a three-email series. Each email needs to be carefully timed to keep from being intrusive. Below, we've provided templates to help get you started on the emails in this series. We've noted in the template, as well, a good delay time for each email.

Email No. 1: First offer to consult—wait 24 hours after downloading lead magnet, then send email on the next weekday (i.e. if the lead magnet is downloaded on a Friday, you'd send this email the following Monday, but if it was downloaded on Tuesday, you'd send the email the following Wednesday).

Subject: **Are you ready for the next step, {Contact.FirstName}?**

{Contact.FirstName}, thanks for downloading {NAME OF FREE ASSET}!

{In this paragraph, call out what your prospects should have learned or gained from the asset you provided. What are some of the specific takeaways that you feel would prompt the most reflection?}

- **What problem are they facing?**
  {Now go into more detail about how this benefit solves a specific pain they have and help them to make next steps.}
- **Make it real.**
  {Composing a story or scenario that illustrates that you understand their pain (by putting yourself in a situation they would be in), this builds credibility and trust.}
- **How you can help.**
  {Now that you've called out and illustrated their problem, swoop in and save the day. This is where you would call out your solution and how they can act now to take advantage of it.}

I/we would love to schedule a free consultation to discuss how I/we might be able to help with (problem or solution). Click below to connect with us.

REQUEST A CONSULTATION

{Company Signature}

Email No. 2: First follow up to consult offer—to be sent two days after email No. 1 on a weekday, but only if they did not respond to email No. 1.

Subject: **Step up your {desired skill/outcome related to asset topic}**

Hello {Contact.FirstName},

{Grab their attention! Say something here that will keep them engaged and reflect back on what they read in your free asset.}

{Call out the value that you or your product provides, or a pain you help solve.}

We would love to schedule a free consultation to discuss how we can help you with {problem or solution}. Click below to set up a call.

REQUEST A CONSULTATION

{Company Signature}

Email No. 3: Final follow up to consult offer—to be sent one day after email No. 2 on a weekday, but only if they did not respond to email No. 2.

Subject: **Still dealing with {pain or struggle related to asset topic}, {Contact.FirstName}?**

Hi there, {Contact.FirstName},

I hope our {asset type, e-book, report, etc.}, {asset title} has helped you {solve a specific pain point}.

{A story or scenario illustrating that you understand their pain (by putting yourself in a situation they would be in), this builds credibility and trust}.

{Now that you've called out and illustrated their problem, swoop in and save the day. Reiterate your brand as the best solution and how they can act now to take advantage of it.}

REQUEST A CONSULTATION

All the best,

{Owner.FirstName} {Owner.LastName}

{Owner.Phone}

{Company}

Set up consult request webform

The emails in the education sequence serve to drive your leads to a webform on a landing page where they can input their phone number and trigger a phone call from your salesperson. The form needs to be designed so that the phone number is added to your contact record while simultaneously triggering a task for you or your sales consultant to make the phone call. Depending on what you are using for a contact record, your webform may just notify someone on your team to update the record and create a task for your sales person, or, if you're using a sophisticated CRM, you could automate this process.

Like your gated content, your form should only ask for the bare minimum information from your lead if you want him to submit the form. Ideally, you'll only need a phone number.

Below is a sample form template:

Request a Free Consultation!

We'd love to set up a consultation with you!

Please share your best phone number below, and someone will contact you shortly to schedule your consultation.

YOUR BEST PHONE NUMBER*

GIVE ME A CALL

Full sequence recap

Your campaign set up should be complete. With all the parts in place, you should be able to turn on the sequence and with marketing automation, it should begin pumping new leads into your funnel and providing good leads to your sales consultants.

To recap the process:

1. Your promotional efforts drive traffic to your free lead magnet landing page.
2. Leads request the lead magnet via the landing page form.
3. This triggers the report delivery email series (two emails)
4. The lead downloads the lead magnet from the email.
5. This triggers the education series (three emails) that offers a consult as further help for pain point.
6. Lead clicks on link in email, which drives them to a webform to submit their phone number and request a call.
7. The webform updates CRM to add phone number to contact record and trigger sales consultant task to call the lead. It also updates automation to turn off the education email sequence if any further emails remain unsent.

What Should I Track?

To get the best sense of how hot your leads are (and to determine how well your campaign is doing), you can track their interactions—the farther through the process they proceed the hotter they are.

1. **Download of asset:** Did they request the asset, but not respond to your email? If so, you could retain them as a weak leads. If they downloaded your asset, that's great news—they are using your content to solve their pain, which means they're interested in your brand. Continue nurturing this lead.

2. **Email opens:** Did they open your emails? Which ones? Did they take action, or just open them?

3. **Click through to webform:** If they clicked through to your webform, there's one more indicator of interest, even if they don't submit their phone number for a call. If they don't submit their phone number, you may want to enter them into a special follow-up campaign to take advantage of their interest.

4. **Request consultation:** You can't lose track of this one! If they request the consultation, you should call them ASAP.

Ben Snedeker

Ben Snedeker joined Infusionsoft in 2015 to do full time that which he loves most: writing the stories that inspire action. He holds a MFA in Creative Writing from Emerson College. In his prior life, he was a freelance writer working days at MIT as a grant manager. After a decade of paper pushing in academia, writing for a fast moving company like Infusionsoft is his dream come true. A perennial tinkerer, when he's not in the office, he can't help but tend his bonsai trees, edit other people's writing, and make sure his kids clear their plates before they leave the table.