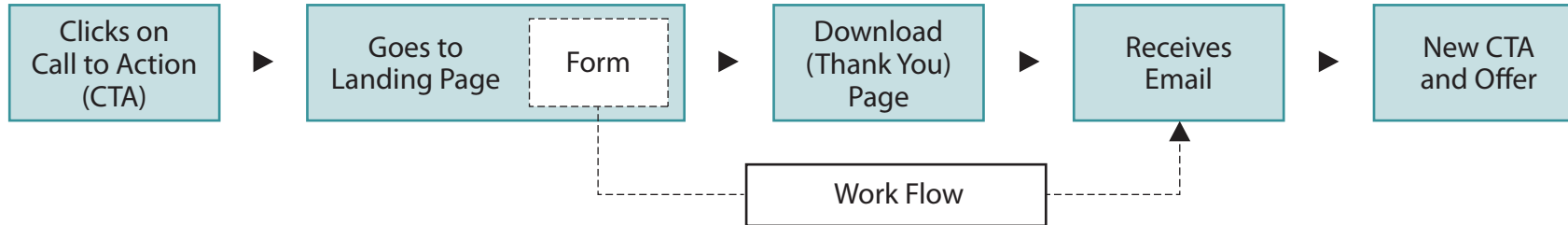
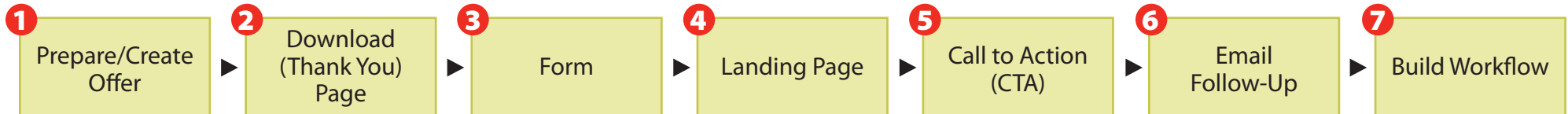


Project Name _____

How Prospect Proceeds



How Offer is Built



File Name

1. Determine Level of offer based on top, middle, or bottom of sales prospect funnel
2. Create offer that has value commensurate with that stage, e.g., simple checklist, more detailed and substantial e-book, white paper, product sample or consultation

File Name

1. Use graphic or photo of offer, ebook, etc.
2. Create or place graphic of download button
3. Write and insert thank you headline and body copy
4. Make sure offer is uploaded (PDF or other digital format) to media library
5. Build on blog or website platform depending on where CTA resides

File Name

1. What fields are needed for level of offer
 2. Which fields are required, which are optional?
 3. Form action: send email notification when form is filled out?
- When form is submitted:
1. User sent to download page
 2. Workflow is triggered, thank you email to user is scheduled
 3. Contact information added to database
 4. Notification email is sent to team member (optional)

File Name

1. Write headline and body copy
2. Include graphic or photo of offer (same as CTA graphic but showing more value?)
3. Use same logo and style as CTA source page (blog or website)

File Name

1. Write headline and subhead with value statement
2. Graphic/photo of offer/ebook/etc.
3. Graphic of download button with directive copy inside

File Name

1. Write headline and body copy
2. Include graphic or photo of offer (same as CTA graphic)
3. Include link to the download
4. Additional offer or links to other resources (e.g., other blog posts)
5. Create a smart email list

File Name

- Used to create rules for automatic actions
1. Create logic of when to send email after form is submitted
 2. Add contact to a campaign
 3. Link form and email to workflow