

# LEAD MAGNET BLUEPRINT

A step-by-step guide to  
creating and implementing  
your email opt-in incentive

## INTRODUCTION

# 5 steps to create your opt-in incentive, set up your email sequencing, and get it onto your website.

**AS A LIST-BUILDING TACTIC, OPT-IN INCENTIVES (A.K.A. LEAD MAGNETS) CAN BE PRETTY AWESOME.** They offer a low-touch way to give someone an experience of your organization's work. They help you start a new relationship based on an equitable exchange of value (their email address for your useful content). And they offer an easy way to stay in touch until the subscriber is ready to make a bigger commitment like register for an event, become a member, buy a product or service, or make a donation.

But opt-in incentives can also be difficult to put into practice since doing so involves coming up with a concept, writing, editing, designing, and integrating it into your website and email service provider.

This guide breaks down the nebulous concept of an email opt-in incentive into straightforward, actionable steps. It takes the guesswork out of the technical details that too often become roadblocks. You'll understand exactly what needs to be done to evolve your simple email list sign-up form into something that will grow your audience, your value, and your thought leadership.

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### A ROSE BY ANY OTHER NAME...

Email opt-in incentives go by lots of different names. More commonly known as lead magnets, you'll also see them referred to as content freebies, opt-in freebies, and "bribes to subscribe" among others.

## STEP 1

## Decide what piece of content to create

**OPT-IN INCENTIVES ARE ONLY AS GOOD AS THEY ARE RELEVANT, USEFUL, OR ENTERTAINING TO YOUR AUDIENCE.**

Bonus points if you create something that meets all three criterion. Focus on common problems or situations your audience experiences for which you have solutions or ways you can move them faster towards a goal. Look for something you can share that would be immediately actionable such as a checklist of things to do to maximize your morning routine, three recipes for healing winter soups, or a mini-ebook about how to find the right pet for your family through animal shelters.

This guide you're reading is another example. Time and time again, I've run into clients who love the idea of having a lead magnet but struggle with coming up with one. Or they have one but have no idea how to get it onto their website. I knew having a step-by-step guide could clarify the process and help people get their opt-in incentive produced and integrated into their systems.



## STEP 2

## Decide on the format

**OPT-IN INCENTIVES CAN TAKE MANY FORMS FROM TIP SHEETS TO TEMPLATES, TO EBOOKS AND ONLINE PRESENTATIONS.** On a scale of easiest to hardest to produce, PDF documents with one or a few pages are the most simple and economical while webinars or online courses are the most complex and potentially expensive.

Generally speaking, the opt-in incentives that see the highest engagement are the simplest ones, like a one-page guide or a checklist or something else that offers a “quick hit” of information or action item. This is good news if you’re having a hard time coming up with an idea, or if you want to stick your toe in the water and experiment.

Ultimately, which format you go with depends on the content itself and what delivery method will be most useful for your audience.

### A FEW IDEAS

checklist or tipsheet  
cheatsheet  
template  
how-to guide  
white paper  
infographic  
map or other types  
of wayfinders

recipe  
family activity  
desktop wallpaper  
printable calendar  
stickers or magnets in  
the mail (*content freebies  
don't necessarily have to be  
downloadable!*)

email challenge  
pledge  
e-cards  
webinar  
video series  
online mini-course

## STEP 3

## Create the piece — write and design

**WRITING AND DESIGNING ANY TYPE OF CONTENT INVOLVES A LOT OF THINKING, DECISION-MAKING, AND SKILL** to clarify ideas through words, layout, and imagery. To be honest, this might be the toughest step in the whole process. As such allow yourself plenty of time for production, whether your opt-in incentive is a one-page checklist or a three-part webinar series.

Since opt-in incentives can often be one of the first experiences people have of your organization, it's important that the design and voice align with your brand as incongruencies can be off-putting or confusing.

If you lack the time or internal expertise, consider hiring creative professionals to help with the writing and design.

If you decide to create the piece in-house, there are a number of easily accessible tools to help with production. My article **“The Best of Free and Low-cost Design Software”** outlines which tools are best for specific purposes, and the **“2017 Guide to Free (and almost free) Vectors, Photos, and Fonts”** can help you source quality artwork for your piece.



## STEP 4

## Set up the opt-in forms and pages

NOW WE'RE GETTING INTO THE HEART OF THE TECHNICAL TRICKERY of integrating your opt-in incentive into your website and email service provider. In the breakdown described in this section, keep in mind a few things:

- The **Email Service Provider (ESP)** is how we refer to the email marketing software you're using for broadcast emails (i.e. MailChimp, Constant Contact, ConvertKit, Salsa Labs, etc.).
- In a **single opt-in process**, a new subscriber is automatically added to the email list after they submit their sign-up form.

*Note: MailChimp recently converted their system from a double opt-in to a single opt-in process.*

- In a **double opt-in process**, a new subscriber has to confirm their subscription before they are officially added to an email list. Mailchimp, Salsa Labs, and ConvertKit go both ways.

While you can use the default forms, language, and pages that your ESP provides, customizing this process will go a long way towards making the opt-in experience feel personal and on brand. And it's easy to do. You'll simply need to set up a page or two on your website and change some of the boilerplate language in the automated email sent out by your ESP.



## A) On your website

### Create a Thank You/Download page.

This is the page where someone will go after they have completed the sign-up form to access the freebie you created for them. Share your appreciation for the trust your new subscriber has given you and make sure it's obvious how they can access the opt-in incentive. Consider including other information on this page such as upcoming events, related resources, blog articles, etc. While you don't want it to be too busy, you also have an opportunity to direct them to other content they might find useful.

If your ESP uses a double opt-in process, in addition to the Thank You/Download Page, you'll need to **create an Interim Confirmation Page**, something that the user will see right after they've submitted the sign-up form that lets them know to expect an email in their inbox with a link to confirm their subscription.

## B) In your email service provider

Log into your ESP and designate a place where all new subscribers coming to you via your opt-in incentive form will go. In MailChimp this means creating a new list or a new group or segment within an existing list. In the case of ConvertKit and other ESPs that don't delineate subscribers into separate lists, you'll create a new tag.

Next, set up the automation sequence. This will vary from ESP to ESP, but for example:

*In MailChimp go to Campaigns > Create an Email > Automated > Welcome new subscribers.*

Consider creating at least two emails for your sequence. **The first (and required) is the email that's sent to your subscriber with a link to download their freebie.** Set the timing for this email to deploy immediately.

**The second email (optional but recommended) is a delayed follow-up** which should be scheduled to go out a day or two or several weeks later to give your new subscriber time to engage with the freebie. Use this follow-up email as an opportunity to learn more about your new subscriber by asking for feedback, offering to answer any questions they have, or letting them know about other resources they might be interested in. Note that if your opt-in incentive is an email challenge or email course, this second check-in email is not necessary as you will have a number of other emails scheduled in your automation.

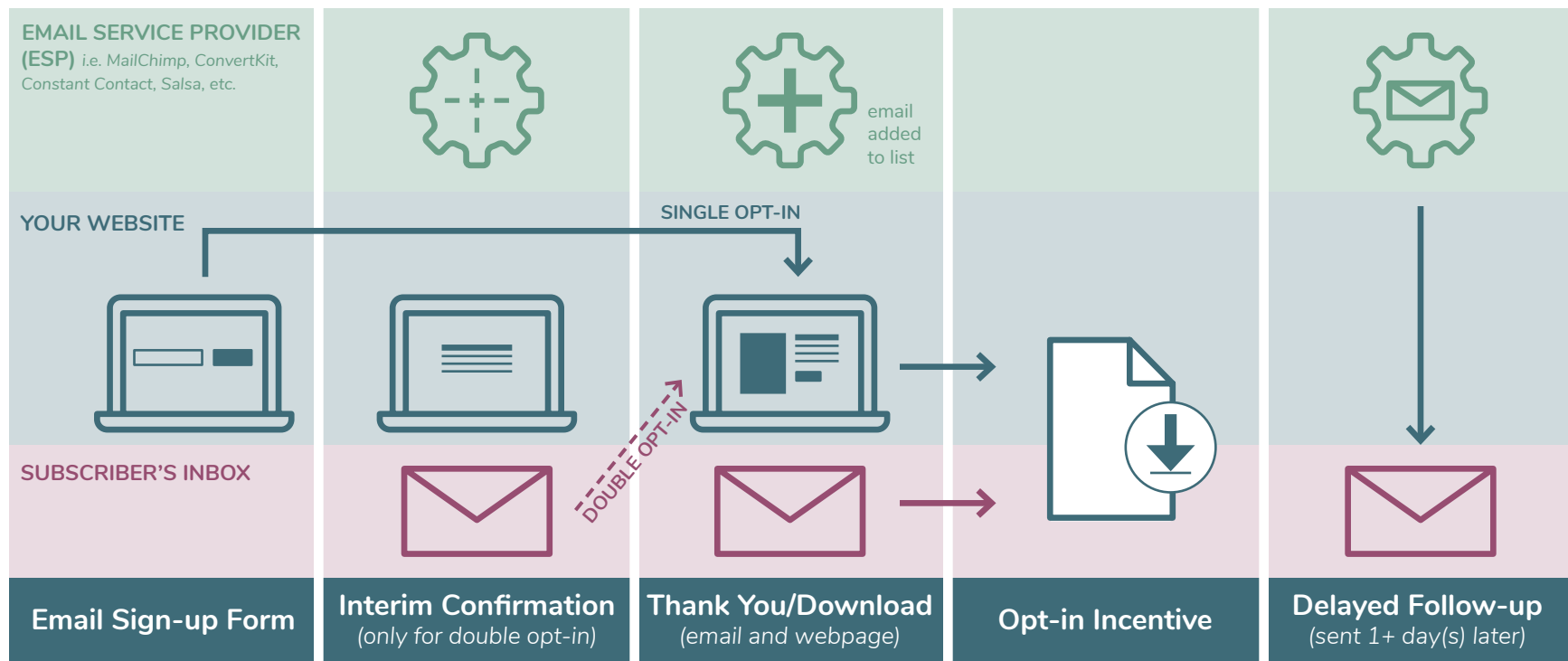
**Finally, customize the language in the form and emails that are part of the automation to conform to your brand voice and visuals.** Where there are options to direct subscribers to custom pages rather than the default, generic pages within the ESP, this is where you'll use the new Thank You/Download page (and in double opt-in cases also the Interim Subscription page) you created. As a rule of thumb, you want to have as much of the experience happening on your website rather than within the ESP so you have more control over experience.

### C) Back on your website

Decide where you're going to put your new email opt-in form, and to the extent you're able, style the form to conform to your brand's look and feel. Location options include the homepage, the header or footer, special landing pages, or as a pop-up with event triggers such as when someone moves their mouse to leave a page (referred to as "exit intent"). No doubt you've encountered some or all of these different ways people incorporate their lead magnet forms.



## What the flow through the sequence looks like



**STEP 5**

## Test the user experience

**WHEN YOU HAVE ALL THE COMPONENTS CONFIGURED, RUN THROUGH THE ENTIRE SEQUENCE** at least a time or two before making the new opt-in form live on your website. Start from the beginning with the sign-up form and follow the process all the way through to the delayed follow-up email. Wear your customer hat when evaluating the experience, and make adjustments accordingly. Retest until you feel confident everything's working well. It's also a good idea to periodically run through the sequence to ensure things are still working as expected and be prepared to evolve the content and experience based on your open and click-through rates over time.



## SUMMARY

Opt-in incentives shift a simple email list sign-up form on your website from something that is all about you to something that's all about your potential subscriber. After you have your first one in motion, creating additional email incentives for other marketing initiatives or audiences should be fairly straightforward. Whether you have one or ten, the most important aspect of this audience building strategy is creating high-quality, relevant content. Stay focused on that and you'll have a piece of collateral you can use in other situations besides your email sign-up forms (think Facebook ads and co-promotions with partners).

Also know that for all their power to attract subscribers, opt-in incentives are not critical to providing a warm, on-brand experience for your new email subscribers. If you're at a stage in your company where it's not feasible to spend the time or resources on developing an opt-in incentive, check out my article **“Build Your List Without a Lead Magnet — Here's How.”** In it I share several simple ways to take a basic email subscription process from boring to brand-tastic so you set the stage for meaningful relationships with your new subscribers.

Good luck with your opt-in incentive and if you want more help than luck, I'm a phone call or email away. ●



*With dual expertise in copywriting and graphic design, Paraphrase Communications creates verbal and visual messaging for companies and causes in the areas of health & wellness, education, environment, and economy. We help new organizations establish their positioning and develop a strong communications platform that will give them visibility and legitimacy. We also work with mature organizations who need to evolve their messaging and collateral to reflect a shift in strategic priorities or structure, and to broaden their reach and strengthen their appeal.*

*We believe that effective communication is the ability to use words and images to help people understand, process, and share information, and communication is the key to living in a world that is happy, healthy, and safe.*

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