COPY SCHOOL
PROFESSIONAL

IN-HOUSE EDITION

THE LIST-BUILDING AND LEAD-NURTURING WORKBOOK

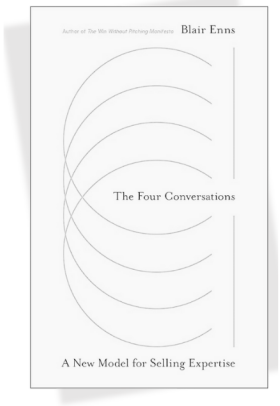
Use this workbook throughout all the CSP training in January.

You will apply this training to lead-generation and nurturing at your org.

THEY COULD SIGN UP FOR ANYTHING. WHY YOUR STUFF?

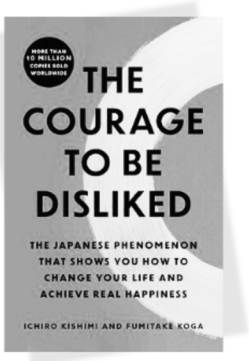
Superconsumers

Eddie Yoon



The Four Conversations

Blair Enns



The Courage to Be Disliked

Ichiro Kishimi and Fumitake Koga

PRE-WORK

SET GOALS & IDENTIFY CONSTRAINTS

LIST BUILDING TARGETS

List, general

	Now	This month	This year
List size			
Lead magnet			
Partners			

List, other (e.g., newsletter): _____

	Now	This month	This year
List size			
Lead magnet			
Partners			

WHAT ARE THE CONSTRAINTS TO LEAD GEN & LIST GROWTH?

AUTHORITY: Thought leadership	
AUTHORITY: Partnerships	
LEVERAGE: Technology	

FIRESIDE CHAT: BORROWING OTHER PEOPLE'S LISTS

Other businesses have already built the list you want. That's why partnerships are a critical part of business development and marketing. Who should you partner with?

PERSONAL BRANDS THAT INFLUENCE KEY PERSONAS AT MY ICP	CORPORATE BRANDS MY ICP USES AND/OR TRUSTS
The growth leaders I want to target at 1000-person fintech companies love Travis Kimmel and Raoul Pal.	*My ICP is built on Shopify Plus and uses Klaviyo for their email marketing. They love Andy Crestodina's content.*
OTHER	**ACTION**

HOW TO BUILD A LIST

HOW TO BUILD A LIST

OPTIMIZING LEAD GEN PAGES TODAY

WITH JOANNA WIEBE

LEAD-GEN PAGE OPTIMIZATION: DATA DUMP

New(er) studies and findings in optimizing lead-generation.

Approx 70% of leads generated by marketing departments with sales teams are **not pursued** by the sales teams.

Although not directly tied to landing pages, studies show that ads located lower on a page - not in the "desirable" topmost position - can have higher conversion rates (on the landing page); ads located higher or at the top of the page have higher clickthru rates but lower subsequent conversion rates. This insight can help us **develop hypotheses for what to place lower on a landing page vs higher** and how to evaluate click tracking when optimizing landing pages. Basically the old adage seems to be true: people who read are people who buy.

Using social proof:

- Visitors, as people, seek homophily, and as such the **social proof that performs best features the most details about the person giving the testimonial** or case study, as long as those details align with the details of the prospect. Basically studies show that Sally still wants things other Sallys approve of; the assumption in the studies is that similarities between the testimonial-giver and the prospect reduce the prospect's risk. Note: *This is especially true for new products / brands and for brands selling solutions with lower financial risk*.
- **When uncertainty is high, social proof performs well up-funnel**, including in ads and on lead-gen pages.

For brand rank claims: consumers continue to respond better to numerical rank claims when set sizes are smaller (<100) and to percentage rank claims when set sizes are larger (>100). So you'd say "Ranked in Top 10% of All Courses on LinkedIn Learning" rather than "Ranked #23 of All Courses on LinkedIn Learning," where LinkedIn Learning is assumed by users to have a lot of courses / large set size.

In what appears to be a completely unrelated study: when you *increase* friction for people searching for sale products, you can increase not only conversion rates but also average order value when, at last, they find the sale product they were seeking. We can use this study to develop a hypothesis for **introducing a lead-gen page**, like a waitlist page, where a product page should be; after joining the waitlist, the lead is dropped on a product page or catalogue *for higher priced items*, anchoring them at a higher price and continuing to keep friction in play re: seeking the original sale product. When the sale product they sought out becomes available to them (e.g., by email), we hypothesize that we will see an increase in conversions (in keeping with the original ecommerce friction study).

LEAD-GEN PAGE OPTIMIZATION:

Conditional body content, presented dynamically.

Objective: Reduce bounce and drive engagement (in order to increase chances of a click) by populating hero / intro copy conditionally, based on location or source.

STEP ONE: LEAD-GEN PAGE WITH CONDITION-BASED, DYNAMIC HERO SECTION

Set up lead-gen page with two hero sections:

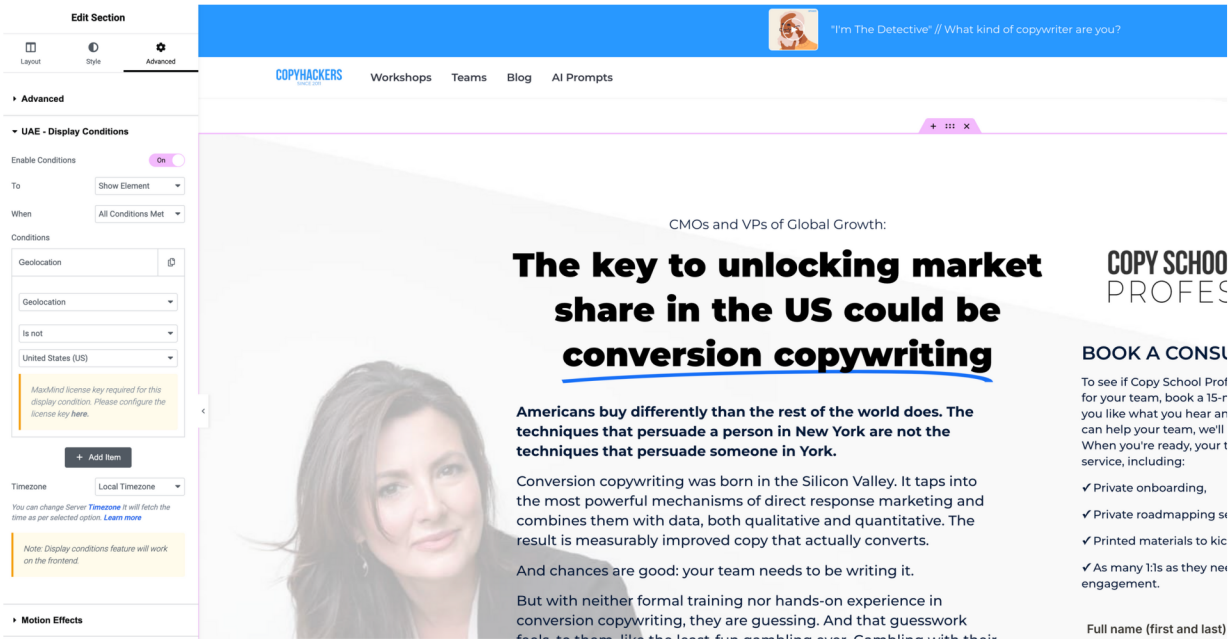
1. For X audience.
2. For Not-X audience.

STEP TWO: APPLY CONDITIONAL DISPLAY SETTINGS

Identify the hero section for X audience, and in your CMS enable conditions to Show Element when Geolocation is X (e.g., United States).

STEP THREE: APPLY CONDITIONAL DISPLAY SETTINGS

Identify the hero section for not-X audience, and in your CMS enable conditions to Show Element when Geolocation is not X (e.g., not United States).



STEP FOUR: PUBLISH

Publish and QA to ensure both versions do not run to the same visitor. Note that the cleaner you make the division between who sees what and who doesn't, the less likely you'll have quality / display issues. In this case, we use "is" and "is not" in "geolocation United States."

LEAD-GEN PAGE OPTIMIZATION:

Conditional form for new vs returning visitors.

Objective: Make it easier for returning visitors to become leads (with a shorter form), or get more info out of returning visitors (with a longer form).

STEP ONE: TWO FORMS

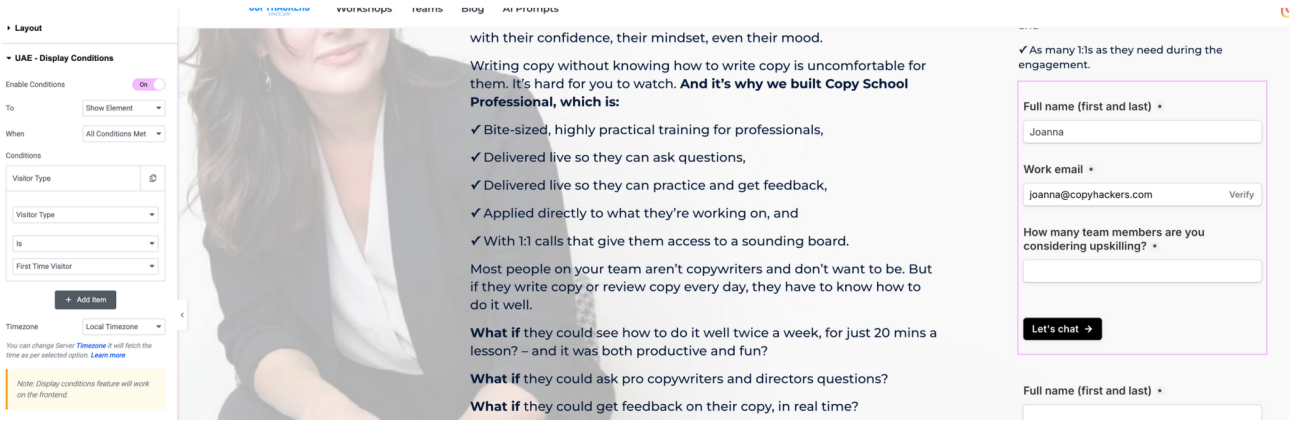
Before / When setting up lead-gen page, develop two forms:

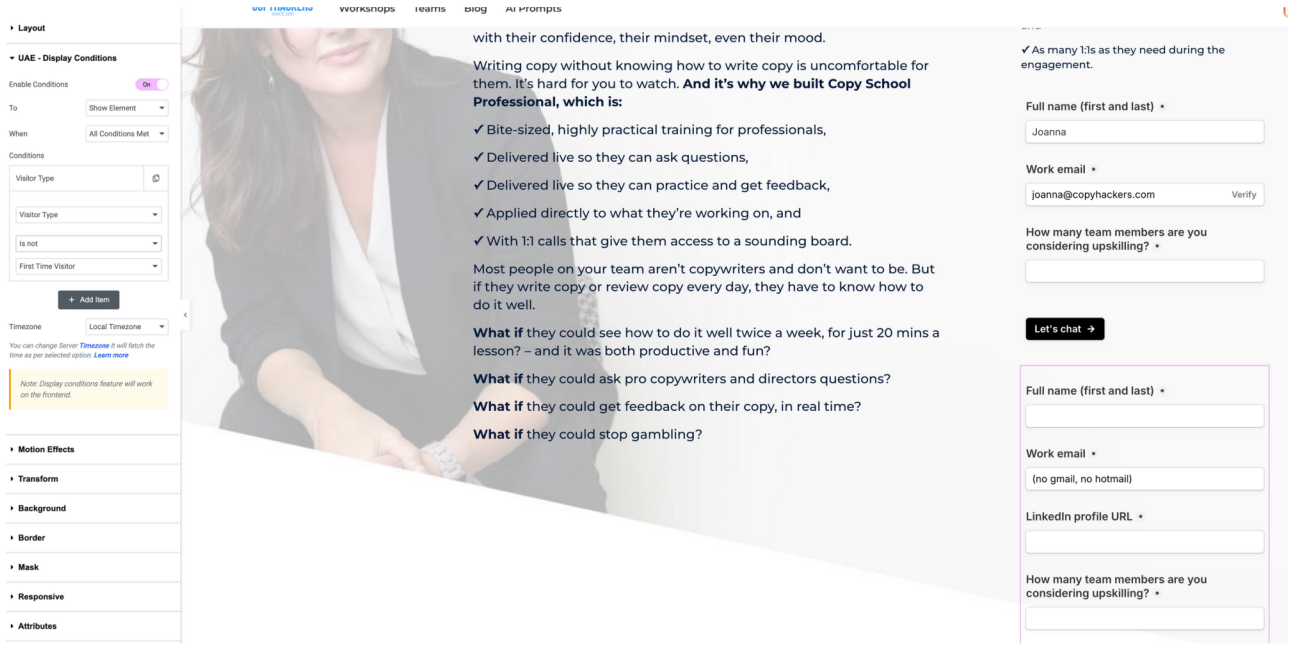
1. First-time visitors.
2. Returning visitors.

Because your objective is to get more, better leads on a lead-gen form, you'd need to first develop an hypothesis for why a first-time visitor doesn't become a lead; that hypothesis helps you develop the form for returning visitors.

Remember that the more form fields equals fewer lead submissions but higher quality leads. (Generally.)

STEP TWO: USE CONDITIONS TO SHOW / HIDE EACH OF THE TWO FORMS.





STEP THREE: PUBLISH

Publish and QA to ensure both versions do not run to the same visitor. Note that the cleaner you make the division between who sees what and who doesn't, the less likely you'll have quality / display issues. In this case, we use "is" and "is not" "First Time Visitor."

LEAD-GEN PAGE OPTIMIZATION:

Conditional form fields, presented dynamically, with leads landed on targeted pages.

Objective: Send good-lead (SQL) phone numbers to Sales without delay, so Sales can call while the lead is hot. During operating hours only.

STEP ONE: LEAD-GEN PAGE WITH CONDITION-BASED, DYNAMIC FORM

Prospect arrives on page and sees two fields:

1. First name.
2. Email address.

Behind the scenes, you've set conditions for the form.

If { email address does not contain gmail, hotmail* } and { time is between 8am and 5pm } then display third field:*

3. Phone number.

The lead submits the form by clicking the button, on which you've set conditions for where to land them:

If { time is between 8am and 5pm } then land on X page. Else, land on Y page.

DON'T WAIT TO SEGMENT.

TYPEFORM & TALLY MAKE THIS EASY.

STEP TWO: X LANDING PAGE (FOR SQLS)

Lead has been pre-qualified as an SQL and sees this headline:

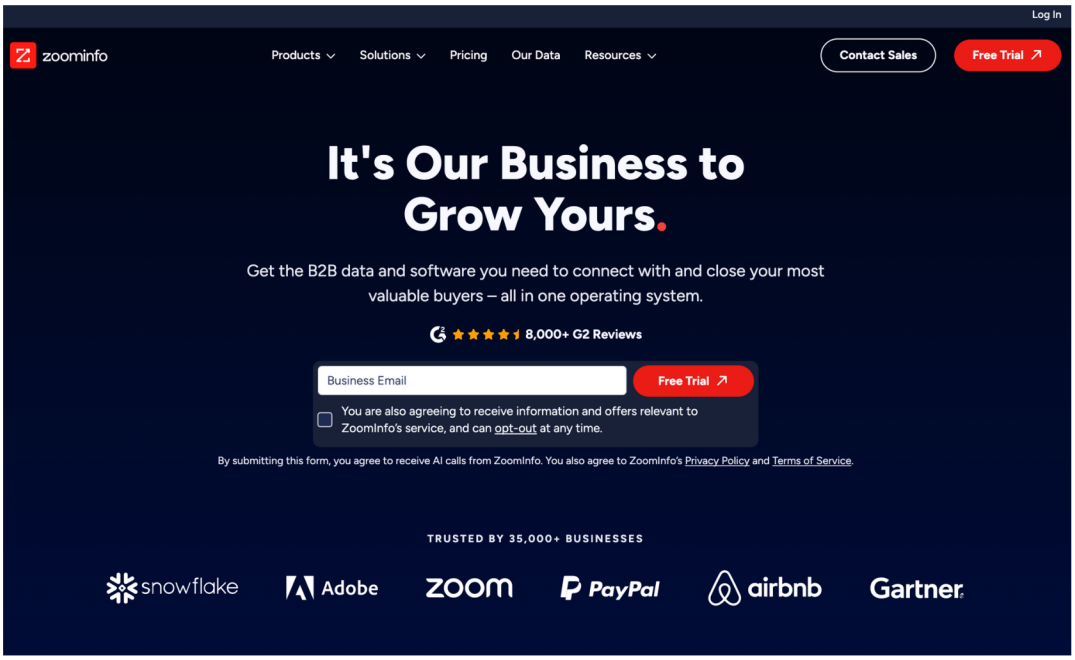
Hang on. We're calling you now.

STEP TWO: Y LANDING PAGE (FOR MQLS / OTHER)

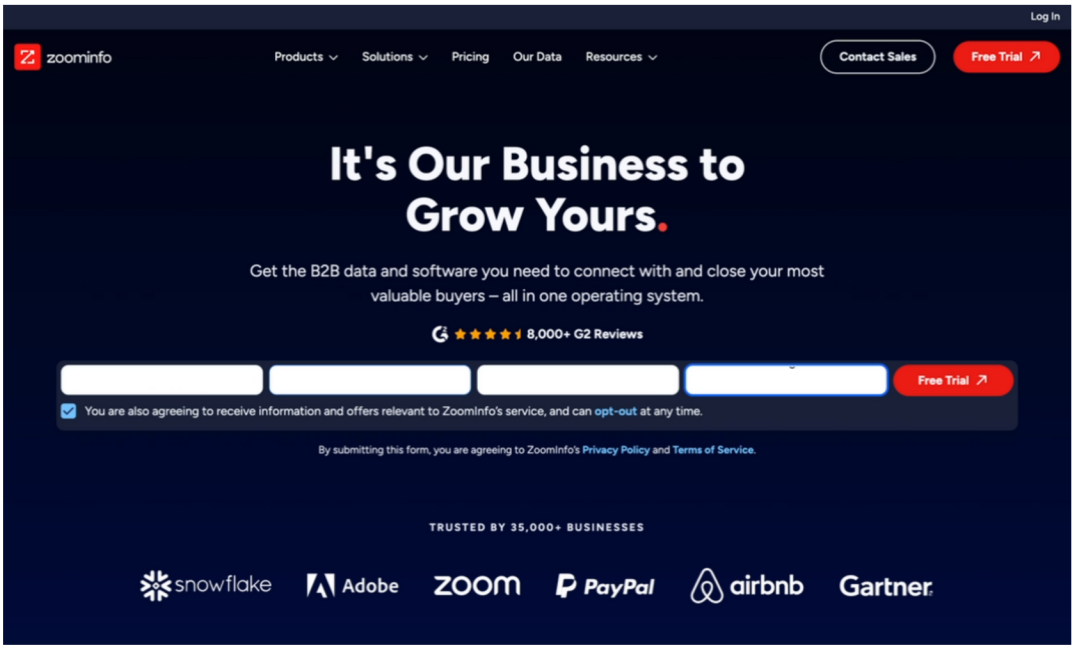
Lead has not been pre-qualified and sees the control landing page, owned by marketing and intended to get them into the marketing funnel.

FOR EXAMPLE...

STEP ONE: LEAD-GEN PAGE WITH CONDITION-BASED, DYNAMIC FORM

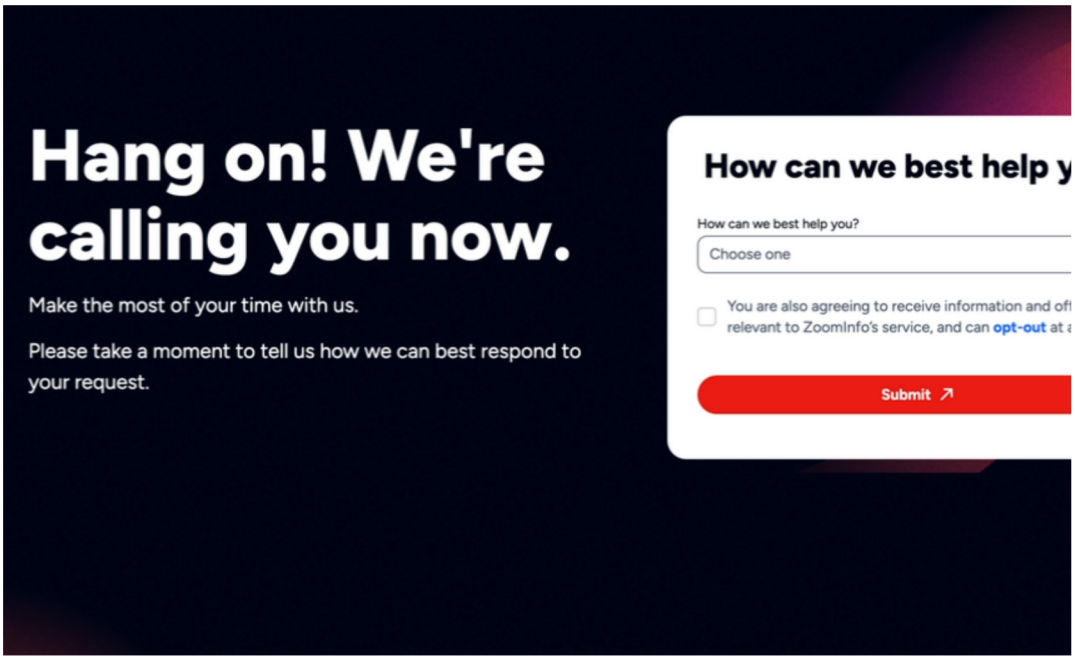


(NEW FIELDS APPEAR)

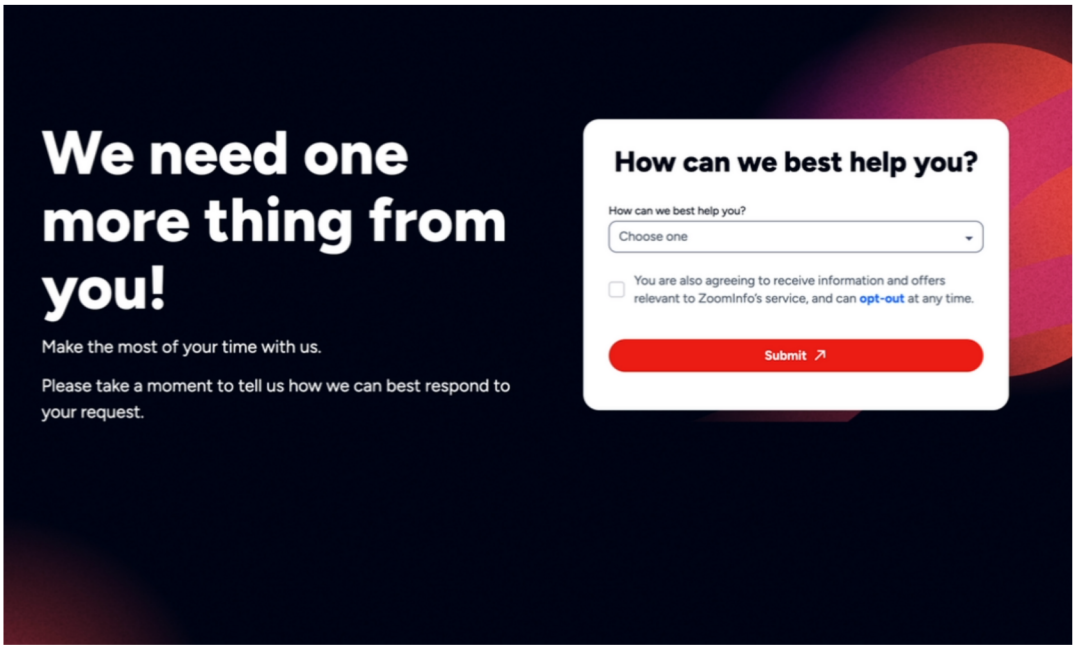


FOR EXAMPLE...

STEP TWO: X LANDING PAGE (FOR SQLS)



STEP TWO: Y LANDING PAGE (FOR MQLS / OTHER)



HOW TO ENGAGE & NURTURE LEADS

HOW TO ENGAGE & NURTURE LEADS

COACHING THE CONVERSION FOR NEW LEADS

WITH RY SCHWARTZ

TOFU MARKETING:

How to Coach the Conversion for New Leads or Subscribers

What they opted in for	
The offer (goal of the flow)	

POINT A (Pre-Customer)	POINT BUYER (Customer)
Reality as it exists for them today (MoHT)	**The new reality we are creating for them (MoHP)**
Their set of beliefs today	**The beliefs we are coaching them toward**

MICRO ACTIONS (MILESTONES)

What needs to happen to make saying yes to your offer feel like the natural next step?

Milestone 1, microaction A	
Milestone 2, microaction B	
Milestone 3, microaction C	
Milestone 4, microaction D	
Milestone 5, microaction E	
Milestone 6, microaction F	
Milestone 7, microaction G	