

AUTOMATION PLANNER

Automation and funnel building is simply putting in to place the steps that you want to accomplish with a task.

Examples are:

- Onboarding
- Nurturing an Email list
- Webinar Signups
- Drip content such course steps
- Lead Magnet submissions
- Newsletters
- Marketing

The first step is deciding the goal that you want to accomplish. What is the end goal of your automation?

From there you decide on the steps of those who will be journeying through your automation.

You will always start an automation with a **BENCHMARK**. A benchmark is how your contact will enter the automation/funnel. Are they filling out a form? Has a specific tag been applied? Did they visit a page?

Once they have done that initial step then you will create all the steps to follow to take them through the automation to the end goal. These steps can be **ACTION** steps or more **BENCHMARKS**.

Let's start with a simple automation.

Your goal is getting them a lead magnet that you are marketing to help increase your list.

You will have a landing page with a **FORM** for them to fill out. On the form you will ask for their name and email address. This form will be your **BENCHMARK**. This will go in your first automation step.

Next step is that you will **SEND an EMAIL** with the download or instructions on how they will get their lead magnet.

You will probably want to add a **TAG** to that contact so that you know later on that this is how they entered the automation. Your tag may just say "lead magnet."

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The automation could simply end there. At this point you might want to send a follow-up email or add them to a different funnel that nurtures them as part of your list with drip content. You can also continue steps within this funnel to nurture them further. If you wanted to start them in a different funnel, you simply could start that funnel with a BENCHMARK - TAG. APPLIED with the same TAG you used to categorize them of getting the lead magnet. This is a good way that tags can target and forward your marketing.

The possibilities can go on for many, many steps. It's all up to you.

On your worksheet your steps would be as follows.

Step 1: Form - specify the form used for your lead magnet. You can create this form right within the funnel in Coach's Harbor.

Step 2: Apply Tag - "Lead Magnet"

Step 3: Send Email with lead magnet download or instructions.

This is just a basic example of an easy automation/funnel with which to start.

There are several done for you funnels in the Coach's Harbor funnel builder.

Try a couple of things and have fun!!

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WHAT IS THE GOAL?

AUTOMATION STEPS

① _____

② _____

③ _____

④ _____

⑤ _____

⑥ _____

⑦ _____

⑧ _____

OTHER NOTES

BENCHMARKS

Form

Booking Calendar

Link Click

Page Visited

Email Opened

Logs In

Email Confirmed

Tag Applied

Tag Removed

Task Completed

Birthday

Field Changed

Contract Signed

User Created

Role Changed

Post Published

ACTIONS

Send Email

Apply Tag

Remove Tag

Add Note

Admin Notification

Create Task

Loop

Skip

Delay Timer

Date Timer

Field Timer

Advanced Timer