

Tech Slow for a Freebie

Follow these steps to learn, create, use/
choose tech to set-up a free gift for your
business.

Tech Flow Difficulty: ★ ★ ★ ★ ★



Tech Flow for a Freebie

In order to set-up a Tech Flow in your business, there are really only 4 steps to follow: **Learn, Action, Choose/Use, & Set-up.**

This PDF was designed to help you through the process

- 1) **Learn** and understand what you want the tech to do *(pages 3-5)*
- 2) **Action** the non-tech stuff that gets plugged into the tech *(below)*
- 3) **Choose/Use** the best tech for the job *(suggestions below & on pages 4 & 5)*
- 4) **Set-up** the technology following the flow from #1 *(steps on pages 4 & 5)*

Action List

Use this action list as a guide to ensure you have completed everything before you move to the set-up phase of this project.

Assets To Create

- ☐ Your Freebie
- ☐ Optin Page Copy/Text
- ☐ Thank You Page Copy/Text
- ☐ Email #1 Copy/Text
- ☐ Email #2 Copy/Text
- ☐ Email #3 Copy/Text

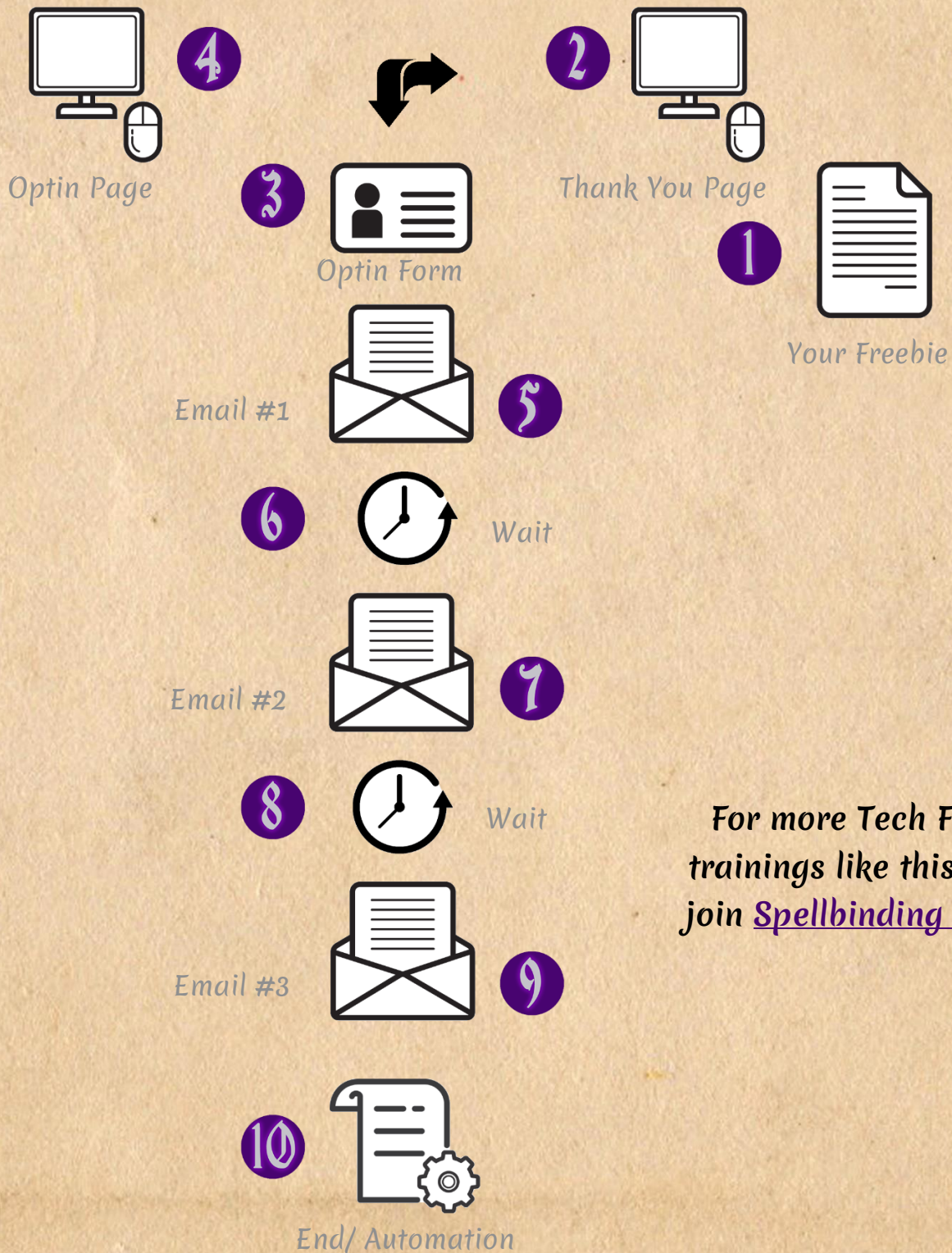
Tech Systems Needed

- ☐ File Hosting *(website?)*
I will use _____
- ☐ Landing Page Builder *(OntraPages?)*
I will use _____
- ☐ Email Marketing System *(ActiveCampaign?)*
I will use _____

Once everything is checked off, a Virtual Assistant who is familiar with your tech system choices will be able to complete this task quickly and efficiently for you.



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Tech Flow Difficulty: ★★★★★★

Longest/Hardest Tech Step: Design/ Set-up the opt-in Page



Tech Slow for a Freebie

1 Your Freebie – In most cases, your freebie is a PDF. But Email Marketing Systems don't really allow you to attach that PDF to your email directly (like you would in a personal email). So you need to find a place for it to live that will give you a URL to use on your thank you page.

One of the simplest places for your PDF to live is on your website. If you are using WordPress, you can upload to your media library. Other places where your file could live are Google Drive, Dropbox, or Amazon S3.

2 Thank You Page – This can be a really simple page. Thank them, provide a 1-2 description of the download to remind them why they are on this page, and include a button that links to the URL of your freebie so they can download the file. That's ALL that is needed on this page. (Can be built with a Landing Page Builder)

You can also include an invitation to your FB Group and/or "share on social media" buttons. (These buttons point to the opt-in landing page... not the thank you page.)

3 Opt-in Form – Build your form in your Email Marketing System. Include first name & email address. (Adding more fields is not recommended). Check your form settings and make sure you send people to the URL for the Thank You page you just created. And when possible, add a tag to their record in your system to note that they downloaded the freebie.

I also recommend that you turn OFF double opt-in. Opt-in confirmation is not required for SPAM laws and just makes it harder to connect with your new people afterward.

4 Opt-in Landing Page – This page should not have any navigation on it. You want the traffic that comes to this page to either Opt-in or leave. (Preferably opt-in.)

Have a photo (preferably of your opt-in), a headline, some copy/text to entice your traffic to opt-in, and your opt-in form.

Depending on your tech choice, you will either be able to connect to your email marketing system directly in the back end to add the opt-in form (*OntraPages/ LeadPages*) or you will need to copy and paste the code from the system (*Divi/ OptimizePress*).

Personally, I use the paid version of *OntraPages* for my page builder and use their WordPress plugin to host the page on my website.



5 **Email #1** – This gets sent immediately after opt-in. The main purpose of this email is to make sure they have the link to a page where they can get your freebie.

Text/copy-wise, think of it as a confirmation email. I often repurpose the text from the opt-in page here so that they have a reminder of what they signed up for when they look at their email later on.

6 **Wait Time** – Assuming your system lets you send more email in the auto-responder sequence... I usually wait 1-2 days before sending the next email

7 **Email #2** –The purpose of this email is simple: to get them to CONSUME the content. So I remind them where to download it and tease them with some content (or the result they will experience) once they have read it.

8 **Wait Time** – Again, I usually wait 1-2 days before sending the last email

9 **Email 3** – While I still include the link to download the freebie, this email is really intended to help them take the next step in working with you. So whatever the call to action (CTA) was in your freebie, you are going to encourage them to take that action here. For example:

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As a member of **Spellbinding Tech**, every month you’ll experience a new tech flow training & have your questions answered about marketing technology in a private Facebook group or on our monthly Q&A calls.

[Click here to learn more.](#)

10 **End / Automation** – Now that they have completed the email sequence, you can add them to you Welcome Sequence or general newsletter list.

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It’s marketing focused tech-help for the non-techie. Every month you’ll choose a new marketing process as your focus and I’ll walk you through all the pieces that make the tech “go”. Then, complete the action list to confidently delegate the set-up to a VA.



Jen Levitz is a Business Wizard, Coach, and Head Mistress & founder of [SpellbindingBusinessSchool.com](#). Jen brings best practices from top 6 & 7-figure information marketers and coaches to help mission-driven, service-based entrepreneurs struggling to create a business that is structurally sound, sustainable, & scalable, signal to the world that they are ready to soar.

