



Platform

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Module Four

Establish Your Email List

Training Video One

How to Create Your First Optin
and Collect Emails Today

Training Video Two

How to Send Your First Email
(And Automate Sending More
Each Day)

Training Video Three

How to Establish an Effective
Email Marketing Strategy



The Remarkable Power of Email (A 20+ Year-Old Tool) with Michael Hyatt & Nathan Barry



Masterclass

You've got an amazing website and fantastic content, but who is reading it? If you haven't found your audience yet, that's okay. That's what we will be addressing in this module. We're going to teach you how to start and grow an email list. It's the most powerful asset you have as a platform-builder and we're going to help you leverage it.

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Training One: How to Create Your First Optin and Collect Emails Today



Deep Dive

There are many email newsletter services for you to choose from, but we recommend using ConvertKit. It's what we use, and we stand behind it as a product. We're going to walk you through setting up your ConvertKit account and show you how to upload an optin to help you grow your subscriber list.

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Training One: How to Create Your First Optin and Collect Emails Today



Deep Dive

Here are the steps to help you create a new ConvertKit account. Make sure you use our affiliate link (listed in the resources section at the end of this workbook) to try a month of ConvertKit for free!

- Create your username and password
- Put your card on file (nothing will be billed the first month)
- Click **Create your Account**
- Enter your address (you can use your personal address but make sure you change this before you send an email)
- Enter your website
- Click **Save my Information**
- Email support@convertkit.com with your blog URL to have your account approved
- Check your email to confirm your email address



Tip: Add any email addresses you want your broadcasts to come from under the email tab in Account Settings



Optin: a free download, ebook or resource you can offer your subscribers just for signing up for your email list



Training One: How to Create Your First Optin and Collect Emails Today



Deep Dive



ConvertKit Optin Form: a form you can embed on your website to collect email addresses that will automatically deliver your optin to subscribers

Here's how to create a Form:

- Click **Forms** from the top menu
- Click **Create Form** in the top right-hand corner
- Select the **Form** option
- Select the style you like the best
- Populate the form with your text and change the form colors

Here's how to upload your optin:

- Click **Settings**
- Click the **Incentive Email Tab**
- Edit the subject line and button

Not sure what to offer as an optin? Here are a few ideas:

- 1.** Short ebook
- 2.** PDF download
- 3.** How-to guide
- 4.** Spreadsheet with helpful information
- 5.** Workbook aimed at helping them solve a specific problem



Training One: How to Create Your First Optin and Collect Emails Today



Deep Dive

After you create a form, embed it on your site:

- Click **Embed**
- Copy Javascript
- Go to your Wordpress dashboard click **Appearance**
- Click **Widgets**
- Select **Text** from the widget options
- Add it to the location where you want it to show up on your site
- Paste Javascript into the text field



Tip: Install the ConvertKit Plugin to have it populate your form at the bottom of every page on your blog or create a pop-up



Tip: Find your API Key in your ConvertKit settings

Remember when writing emails to your audience:

1. Sound like yourself using words you normally use in personal conversations.
2. Write an email to one person, then go back and edit to address your whole audience.



Training Two: How to Send Your First Email (And Automate Sending More Each Day)



Deep Dive

Now that you are all set to collect emails, it's time to send your very first communication to your audience. We'll walk you through it!

NOTES



Training Two: How to Send Your First Email (And Automate Sending More Each Day)



Deep Dive

How to add subscribers manually:

- Click **Subscribers**
- Import a list or hit the plus sign to add subscribers manually
- Add them to a form you previously created and click **Save**



Broadcast: a single email sent to a group of people on your email list

Create your very first Broadcast:

- Click **Broadcast** in the top menu
- Select **New Broadcast** on right hand side
- Select the email address you want the email to come from
- Segment your audience and select which lists you want to email
- The default setting will automatically send to everyone on your list
- Create your email
- Send a preview email to yourself by clicking the **Email** button on the right hand side



Training Two: How to Send Your First Email (And Automate Sending More Each Day)



Deep Dive

Create your very first Broadcast (continued):

- Click **Next Step** at the bottom
- Schedule delivery for another time if you do not want to send your broadcast now
- Or select **Send Immediately**

How to write good email subject lines:

1. Study email subjects in your inbox that attract you
2. Write as if you are writing to one person
3. Write a subject line that creates a question in your reader's mind (Example: You'll Never Believe What Happened to Me Yesterday)



Broadcast Sequence: multiple emails that will automatically be sent out to subscribers in a predefined order

Steps to create a Broadcast Sequence:

- Click on **Automations**
- Select **New Automation**
- Click **Create an Automation**
- Select the form you want to use (so the beginning of the automation will start when they optin with that form)
- Click to add an action
- Click to add an email to the sequence



Training Two: How to Send Your First Email (And Automate Sending More Each Day)



Deep Dive

Steps to create a Broadcast Sequence (continued):

- Name your sequence (no one will see this)
- Begin to edit your email
- Add as many emails as you want to the sequence
- Select your sequence times (default is one day)
- When you are ready for the sequence to take effect change the email status to published on each email
- Hit **Save** in the top right hand corner
- In the top corner click the automation button to move it from Paused to **Live**

Example Welcome Sequence:

Email 1: Learn about your audience by asking questions and segmenting them into categories

Email 2: Tell them your story

Email 3: Call to Action



Training Two: How to Send Your First Email (And Automate Sending More Each Day)



Deep Dive

You might want to create a survey in your Welcome Sequence. It's easy to do this!

- Write the survey questions and options (1-5 questions—anything you'd like to learn about your audience)
- Highlight response
- Select the **Hyperlink** button
- Select **Tag Subscribers Who Click This Box**
- Create a tag or name for that category of people or that response (example: beginner)
- Import a link to a page to send them to
- Hint: If you don't have a landing page set up to send them to, you can use ConvertKit's standard "Thank You" page (find this link in our resources section)

Example Sales Funnel Sequence:

Email 1: Tell them your story and build trust around the problem you are solving.

Email 2: Offer them a free download or bonus optin.

Email 3: Present your sales offer.



Training Three: How to Establish an Effective Email Marketing Strategy



Deep Dive

With everything you do in platform-building, you'll need to establish a strategy. Email marketing is no different. How and when will you communicate with your audience? It's time to decide.

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Training Three: How to Establish an Effective Email Marketing Strategy



Deep Dive

Tips to help you develop your email marketing strategy:

1. Write like you talk.
2. Be consistent in your frequency and length of emails.
3. Write like you are writing to one person.
4. Don't be afraid to email often, just remember to be consistent.

How often will you email your audience?

What is your target word count for each email?

What's your end goal with your email marketing? More traffic? More sales?

Building trust with your audience?

What kind of optin will you offer?



Module Four Additional Resources

Below you'll find a list of helpful links, recommended reading, and resources to support you during Module Four.

ConvertKit



OptinMonster



Nathan Berry's Website



Isa Adney's Website



ConvertKit's Default "Thank You" Landing Page



ConvertKit's WordPress Plugin





Before you move on . . .

Nice work! Here's your Module Three checklist:

- Set up your ConvertKit account
- Create a form
- Upload your optin
- Download the ConvertKit plugin OR manually embed your form on your site
- Create your first Broadcast
- Create your Welcome Broadcast Sequence to automatically go out to new subscribers after they receive their optin
- Determine your email marketing strategy