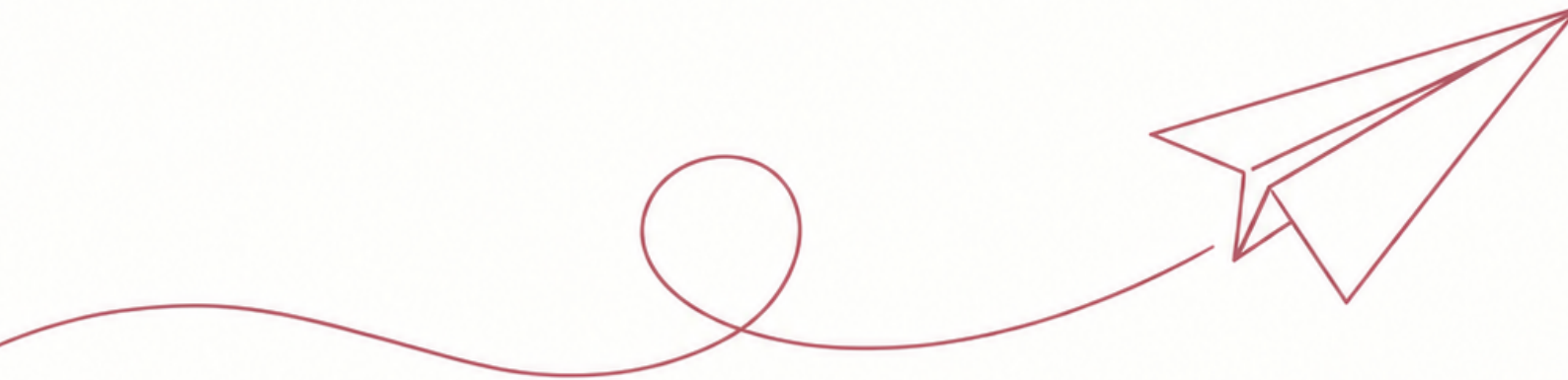


A PRACTICAL WORKBOOK

From Freebie *to* Funnel

A STEP-BY-STEP GUIDE TO TURN YOUR
LEAD MAGNET INTO A PAYING CLIENT JOURNEY



Attract. Nurture. Convert.

POLLY MAY
— COACHING —

This isn't another guide about why you need a lead magnet

You probably already know that.

The problem is what happens next.

Where does the PDF live? How do people get it? How does your mailing list know who downloaded it? What emails do you send afterwards? How do you add something paid? Where does Stripe fit? And how do all these different bits connect?

I've now created multiple lead magnets and digital courses, using a combination of Canva, MailerLite, AI-generated graphics, Stripe and my own website.

I've made mistakes. I've found the workarounds. And I've worked out the order that makes the whole thing considerably easier.

THIS IS THAT ORDER.

I use MailerLite as my example. If you use another mailing-list platform, the principles and sequence should still apply.

What you're going to build

SOMEONE FINDS YOU

LANDING PAGE

FORM

MAILING-LIST GROUP

AUTOMATION

EMAIL 1

FREE RESOURCE

FREE ROUTE

Nurture emails
General mailing list
Main offers

PAID ROUTE

Paid layer
Stripe + form
Warmer nurture
Main offers

Before you touch the tech

Before you decide what to create, get clear on who you want to attract.

My ideal lead-magnet customer is:

The problem they're already thinking about is:

What might they logically need afterwards?

Not clear enough about your ideal client yet?

Use my FREE Business Reality Check first.

[CLICK HERE FOR LINK](#)

DON'T START WITH

“What PDF could I make?”

START WITH

WHO DO I WANT
TO ATTRACT?

One of my lead magnets speaks to people who already have or are building a business. Another speaks to experienced women wondering whether they want something different next.

**Different freebie. Different person.
Different conversation afterwards.**

Who do YOU want to attract?

The Goldilocks problem

Useful. But not too useful.

When I was developing one of my own lead magnets, I realised the first version was almost too helpful. If your free resource completely solves the problem, you've potentially removed the reason for someone to take another step with you.

FREE

Recognition + insight

LOW-COST / PERSONAL LAYER

Personalisation + interpretation

CORE OFFER

Deeper change + implementation

Your freebie needs to be genuinely useful. It just doesn't need to do your entire job for free.

1

What should actually be in it?

1

A strong title

Something your ideal customer immediately recognises.

2

A short introduction

Why this matters and what they're about to get.

3

Useful content

Questions, prompts, a checklist, diagnostic or mini-guide.

4

Something for them to do

Help them think or act.

5

A natural stopping point

You don't have to solve everything.

6

A next step

What could they do if they want more?

MY LEAD MAGNET TITLE:

IT WILL HELP SOMEONE TO:

Create it

My stack: Canva + AI + me

You do not need to be a designer. I use Canva to create and brand my resources, alongside AI-generated graphics and AI support with structure, editing and ideas.

BRAINSTORM

ORGANISE

EDIT

SHORTEN

GENERATE VISUALS

SPOT WHAT'S MISSING

AI should make creating easier.

It shouldn't make you sound like everybody else.

2

Your funnel on one piece of paper

Where will people discover it?

Where will they sign up?

What mailing-list group will they join?

What will joining that group trigger?

Where will the resource itself live?

Will I offer a paid next layer?

A quick word about mailing-list software
I use MailerLite. If you use another system, look for the equivalent
of:

FORM → GROUP / TAG / SEGMENT → AUTOMATION → EMAIL
SEQUENCE

Step 1: Create a group

Before you create the landing page, decide where these new subscribers will go.

WHAT IS A GROUP?

Think of it like putting a label on someone that says:

“This person downloaded THIS.”

What If? download
→ What If? Reality Check group

Business Reality Check download
→ Business Reality Check group

Your platform may call this a group, tag, segment or audience. The name doesn't matter. What matters is that your system can identify WHO downloaded WHAT.

WARNING

ALREADY HAVE AN AUTOMATION?

Before you duplicate it, understand one thing.

If this is your first lead magnet, move on.

If you're copying an existing automation, the emails may copy perfectly while the system is still listening for people who downloaded your old freebie.

THE TRIGGER = THE INSTRUCTION THAT TELLS YOUR SYSTEM
WHEN TO START.

WHEN someone joins the NEW group → START the NEW email
sequence.

Duplicate → Rename → Find START/TRIGGER → Change to NEW group →
Save → Then edit emails.

Step 2: Build your landing page

Your landing page needs enough information for the right person to think:

“Yes. That's for me.”

TITLE

What are they getting?

SUBTITLE

Who is it for / what does it help with?

SHORT PARAGRAPH

Two or three simple sentences explaining what the resource is, why it might help and what they'll get from it.

FORM

Name + email.

BUTTON

SEND ME THE FREE [RESOURCE]

Enough to explain the product. Not so much that they have to read an essay before signing up.

3

Step 3: Make sure signing up starts the automation

PERSON FILLS IN LANDING-PAGE FORM

THEY JOIN YOUR LEAD-MAGNET GROUP

JOINING THAT GROUP TRIGGERS YOUR AUTOMATION

EMAIL 1 IS SENT

THAT MIDDLE CONNECTION IS ESSENTIAL.

If you've promised someone your freebie personally, the safest option may be to have them complete the actual signup form - or test exactly what happens when you add them manually.

If somebody is sitting in your lead-magnet group but has received zero emails, investigate. They may have entered the group through a different route and never triggered the automation.

Where should the resource live?

OPTION 1 - DIRECT PDF

If it's a small, simple PDF, your mailing platform may let you deliver it through a button in Email 1.

OPTION 2 - DOWNLOAD PAGE

Create a page on your website that is not linked from your navigation or other public pages. It simply exists at its own URL for people who receive the link.

OPTION 3 - VIDEO

Host it somewhere appropriate - for example Vimeo, YouTube as unlisted, Microsoft or another video/file platform - and send people the link.

NOTE: A page that isn't linked from your website is not genuinely secure or private unless you password-protect it. It is simply not intentionally discoverable through your normal navigation.

4

How to create a download page

- 1 Create a new page on your website platform.
- 2 Do not add it to your navigation/menu.
- 3 Upload your PDF/file to your website platform's file or media area.
- 4 Copy the file link.
- 5 Add a DOWNLOAD button to your new page.
- 6 Link that button to your file.
- 7 Ideally open the file in a new tab.

PDF TOO BIG FOR YOUR MAILING SYSTEM?

Don't waste ages fighting it. Host it on your website instead and send subscribers to the download page. It can actually create a better funnel because you control what they see alongside the download.

“

*DON'T DELIVER IT
AND DISAPPEAR.*

Somebody has just told you exactly what they're interested in. That's valuable.

5

Your six-email nurture sequence

EMAIL 1

DELIVER

Resource + reminder + introduce yourself.

EMAIL 2

RECOGNISE

Talk about the problem that brought them here.

EMAIL 3

RELATE

Tell a relevant piece of your own story.

EMAIL 4

EVIDENCE

Use a client story or case study.

EMAIL 5

THE GAP

What can't the free resource do alone?

EMAIL 6

WHAT NEXT?

Introduce your offers + explain what happens now.

PAID NEXT STEP? In Emails 1-3, I often keep it in the P.S. By Emails 4-6, it can move naturally into the body of the email.

DON'T LOSE THEM WHEN THE AUTOMATION ENDS.

Your nurture may be finished.

Your relationship with that subscriber isn't.

At the end of the sequence, make sure they remain on - or are added to - your general mailing list, subject to the consent you've collected.

SHARE USEFUL IDEAS

TELL STORIES

PROMOTE EVENTS

INTRODUCE OFFERS

INVITE THEM TO WORK WITH YOU

*Don't spend all that effort attracting and nurturing the right person
and then simply lose them.*

6

What could you add?

Your free resource has helped someone understand something. What might they logically want next?

- | | |
|--|--|
| ☐ Personal feedback | ☐ Recommendations |
| ☐ Audit | ☐ Mini video response |
| ☐ Review | ☐ Personalised plan |
| ☐ Templates | ☐ Another idea |

WHAT IS THE SMALLEST USEFUL PAID STEP

between my free resource and my main offer?

Don't invent a cheap product for the sake of having one. It should solve the next problem.

Take payment simply

I use Stripe.

Stripe is a widely used online payment platform that lets businesses accept card payments securely.

PRODUCT

PRICE

PAYMENT LINK

You don't necessarily need an online shop. Put the payment link behind a button on your download page or inside your emails.

Your customer clicks. Stripe handles the payment. You decide what happens next.

6

What happens after they buy?

FREE RESOURCE

OPTIONAL PAID LAYER

STRIPE PAYMENT

CUSTOMER FORM

YOU DELIVER

I use Microsoft Forms and have it set to alert me when someone submits the form. You can use another form system.

THEN CHANGE THEIR EMAIL JOURNEY

Buyer Email 1 - fulfilment / what happens next

Buyer Email 2 - useful follow-up

Buyer Email 3 - introduce the logical larger offer

Consider removing buyers from the original free nurture and adding them to a separate buyer group.

WARNING**YOUR FORM WORKS.**

But does it work for your customer?

I discovered I'd created a Microsoft Form that I could access perfectly... because I was logged into my own Microsoft account.

TEST AS THE CUSTOMER. NOT AS YOURSELF.

Make sure your form allows the people you intend to serve to respond. Then open a private/incognito browser window and paste the link.

Can you access it?
Can you complete it?
Does it behave exactly as expected?

I'D PRINT THIS PAGE OUT.

- | | |
|--|--|
| ☐ Free resource finished | ☐ Resource opens |
| ☐ File uploaded / hosted | ☐ Optional paid offer visible |
| ☐ Mailing-list group created | ☐ Stripe link correct |
| ☐ Landing page created | ☐ Customer form accessible logged out |
| ☐ Form connected to correct group | ☐ Buyer journey created if needed |
| ☐ Correct group triggers automation | ☐ General mailing-list route set up |
| ☐ Automation activated | ☐ All emails checked |
| ☐ Email 1 links correctly | ☐ All links checked |
| ☐ Download page works | |

Don't promote until you've ticked the lot.

Become your own customer

Use another email address if possible and go through the exact journey.

- 1. Find your landing page**
- 2. Fill in the form**
- 3. Check your inbox**
- 4. Open Email 1**
- 5. Click the resource link**
- 6. Open/download the resource**
- 7. Click the optional paid offer**

OPTIONAL FULL PURCHASE TEST

Stripe's dedicated test setup can take extra work. For a small paid layer, you may decide it's easier to buy it yourself once, accepting the small transaction fee, so you experience exactly what a real customer experiences.

- 8. Complete the purchase (optional)**
- 9. Follow the purchaser route and complete the form (optional)**

DON'T JUST SAY

“I've made a free guide.”

ATTRACTION	Talk about the problem.
HAND-RAISER	Offer the resource.
CLIENT STORY	Show what can change.
AUTHORITY	Teach one useful part.
PERSONAL STORY	Explain why this matters to you.
DIRECT PROMOTION	Sometimes simply tell people what you've made.

Every post doesn't need to promote the freebie. It needs to attract the kind of person the freebie was built for.

Give it a permanent home

Don't rely on one LinkedIn post.

- ☐ Free Resources page
- ☐ Link-in-bio page
- ☐ Homepage
- ☐ Newsletter
- ☐ Website pop-up
- ☐ Relevant existing content
- ☐ LinkedIn Featured
- ☐ Email signature where appropriate
- ☐ Instagram bio

**YOU CAN HAVE MORE THAN ONE
LEAD MAGNET.**

Different resources can act as different doors into your business. Know who each door is designed for - and what journey sits behind it.

LOOK WHAT YOU'VE BUILT.

DISCOVERY

LANDING PAGE

FORM

GROUP

AUTOMATION

FREE RESOURCE

NURTURE

GENERAL LIST → CORE OFFERS

or

PAID LAYER → BUYER NURTURE → CORE OFFERS

Your lead magnet is the system around the download.

WANT ME TO HELP YOU BUILD YOURS?

You can absolutely build this yourself. You now have the blueprint.

But if you've got to the end thinking, "I know what I need to do. I'd just really like someone to help me work out what mine should look like." - that's exactly what we can do.

NEXT MOVE

90 MINUTES WITH POLLY

We'll work through your business, your ideal client and what you're trying to achieve - and map out the right next move for you.

Usual price: £222

Blueprint purchaser price: £199

[CLICK HERE FOR LINK](#)