

Start Here

PRE-LAUNCH CHECK

PLAN

CREATE

ANALYTICS & TRACKING

GO-LIVE

Access to Apps & Platforms:

- LeadsHook
- Ad platforms & traffic sources
- Landing pages (E.g. Wordpress, FTP. builder)
- Access to CRM, Marketing Automation Platform, Email Service Provider (ESP), etc.
- Webhooks/APIs Credentials
- SMTP
- Lead Distribution
- Collateral: Logos, Images, Videos and Copy
- SMS
- Client CRM & Apps
- Data Validation & Verification
- Tracking & Analytics (GTM, GA and various pixels) + Serverside Access



**Working With Clients?
START THIS PROCESS NOW!**

- Purpose of Campaign (e.g. lead gen, direct to sale)
- Campaign Angle (What is the conversation in the mind of your lead/customer?)
- Map your funnel or customer journey and position of your decision tree
- What data are you sending to your landing page/decision tree (use URL params)
- Custom Fields: What data is required to meet your campaign objectives. Ask downstream users of info.
- TAGs (if supported): What TAGs do you want to transfer to your CRM/ESP?

Create As Many Appeals As You Can. Then Narrow Down To 1. Why 1? To Get Started ASAP! (You can always expand later)

- Create Ad(s)
- Create Start Page (Optional)
- Create Questions & Answers
- Create Opt-In Form* (Optional)
- Create a Results-Page/Thank you page
- Create Results (Recommended but optional)
- 'Attach' Results To Answers OR Use Decision Nodes
- Create Decision Tree
- Create Answer & Opt-in Form Custom Fields
- Associate Answer Custom Fields To Answers
- Establish Connection To ESP. Webhooks/API, SMTP, CRM, Zapier etc
- Use Custom Field Mapper to Map Custom Fields to ESP
- Add ESP/API/Webhook/SMTP node(s) to Decision Ttree to automatically transfer leads
- Add Viral Element (Optional)

*** You Can Add Form Fields Anywhere So An Explicit Opt-In Is NOT Required**

TIP #1! After an addition to quiz, PREVIEW. REPEAT.

TIP #2! Phone Sales? Add Emails For Immediate Notification.

- Add Tracking (GTM or Direct)
- Add Conversion Tracking At The Appropriate Location (e.g. Results-Page)
- Add Node Level Tracking
- Confirm Tracking/Pixels are Firing
- Add Serverside Tracking
- Confirm Deduplication is working

TIP! Use 'Events' For Granular Tracking (e.g. Events with FB Pixel).

- Ensure Congruency Between Steps of Your Campaign including Intra-Decision Tree PAtHs
- Add Decision Tree Embed Code To Landing Page(s)
- Adjust Decison Tree Background Colour Settings for Seamless Integration
- Update Ads and/or tracking system with Landing Page URL(s).
- ACTIVATE Decision Tree
- ACTIVATE Traffic
- TEST to Ensure Lead Captured and Transferred To ESP/Email/CRM.ESP/CLIENT Ensure Leads Details Passed.
- Go-LIVE

TIP! Start with Dynamic Landing Pages so you're not wasting money on Ads-Lander Misalignment!