Lead magnet launch checklist

From idea to first sign-up in a week. Tick each box as you go.

My lead magnet

Who it's for, and the one problem it solves

The paid offer it leads to

Launch date

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1. Pick one idea

Task	Done
Score a few ideas in the idea bank and pick the top one.	
Write the promise in one sentence: "Get [result] in [time] without [pain]."	
Check it solves a first step of the problem your paid coaching solves.	
Pick a format you can finish this week (a checklist beats an unfinished course).	

2. Make the freebie

Task	Done
Write the first version. Short and useful wins: one page is fine.	
Add your name, your website and one line about how you work with clients.	
End with one next step, for example "Book a free 15-minute call".	
Save it as a PDF (or upload the video) somewhere you control.	
Copy the share link and open it in a private browser window to check anyone can see it.	

3. Build the opt-in form

These steps use the free Lead magnet opt-in template in HornetForms (Lead generation category). Every step works on the Free plan.

Task	Done
Open the template and click Use this template.	
Rename "Work email" to "Email" if your clients sign up from home. Keep it required.	
Keep first name. Cut any question you won't use in your first follow-up email.	
Change the "Biggest challenge right now" options to the problems your clients bring to you.	
Keep "Want a short call about it?". For a booking instead of a phone number, add a Calendly or Cal.com scheduling question and show it only to people who pick "Yes please".	

4. Send the freebie

Pick one way. The template's thank-you screen says "Check your inbox for the download link", so edit it if you choose way B.

Task	Done
Way A, by email: turn on the confirmation email to respondents and choose the email question as the address. Without that choice, nothing is sent.	
Way A: write your own subject (up to 200 characters) and message (up to 5,000 characters) and put the download link in the message, written as [Get your plan](your link) so it shows as clickable text.	
Way B, straight away: set the form's redirect URL to the file, or to a thank-you page on your site that holds the link.	
Turn on an email to yourself for each new response. It is off until you switch it on.	
Fill in the form yourself on your phone and check the freebie arrives.	

5. Share it

Task	Done
Put the link in your bio and email signature, with ?utm_source=instagram or ?utm_source=signature on the end, so you can see which link each sign-up came from.	
Embed it on your website (inline, popup, slider or full page).	
Make a QR code for talks, workshops and printed handouts.	
Mention it at the end of every free talk, podcast and post for the next month.	

6. Follow up

Task	Done
Send new sign-ups to your email tool with Zapier or a webhook, or copy them over from the CSV export.	
Write a welcome email that arrives within a day and asks one question they can reply to.	
Send one more useful email, then invite them to book a call.	
Book the calls from the form: anyone who said "Yes please" gets a reply first.	

Marketing emails: check your local rules (this is not legal advice)

In the US, the FTC's CAN-SPAM guide says: "Your message must include a clear and conspicuous explanation of how the recipient can opt out of getting marketing email" and "You must honor a recipient's opt-out request within 10 business days." It also asks you to tell recipients where you're located. FTC, CAN-SPAM Act: A Compliance Guide for Business: https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business

Other countries have their own rules, some stricter about consent. Check what applies to you, or ask a qualified adviser.

7. Two weeks later

Task	Done
Open the form's built-in analytics: views, starts, completions and the completion rate for each UTM source.	
If many people start but few finish, cut a question.	
Ask five sign-ups what they found useful, and what they still need.	
Note how many sign-ups booked a call. That is the number to grow.	

Sign-ups after two weeks

Calls booked from them

One change for next month
