

Lead Magnet Builder Step-by-Step

Ebook

Find five or more blog posts on a related topic.

Ebook topic:	
	URL
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Remove time-stamped language (“last year” or “this week in the news...” etc)

Write short transitions to tie sections together.

Find someone who knows the basics of design to lay your ebook out, or use a design-assist site like Canva to produce a high-quality product. Resist the urge to just turn a Word document into a PDF.

Promote your finished product on Facebook, LinkedIn and other channels.

Write new blog posts on the topic and attach the ebook as a downloadable to capture lead information.

(NEXT PAGE: QUIZZES)

Quizzes

Select a few topics that could make good quizzes (e.g., When Should You Retire? When Should You Claim Social Security?)

One note: Be sure your disclaimer on the quizzes clearly indicates that the results should not be taken as advice. Typically something like this will help ensure you are covered:

- » Quiz intended for entertainment purposes only. Results should not be taken as advice. Consult with a financial planning professional before taking any action.

Quiz Ideas	
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Map out the possible results. For instance, if your quiz theme is, “When Should You Retire?” the possible results may be:

- » You’re getting close!
- » Give it a few years
- » You have some saving to do

Create a series of multiple choice questions that would lead someone to your results. Try to keep it to 10 questions or fewer.

Use quiz-building software such as [Outgrow](#) or [Typeform](#) to bring your quiz to life.

Decide where your conversion form will go. If you gate the results page (i.e., ask for their name and email before showing them the results), it will dramatically decrease the number of people who will finish your quiz. But you probably don’t just want to build a quiz for the fun of it, so it’s up to you to decide which path to take:

Gate the results page

Don’t gate results page and include a CTA to download a related ebook or register for a webinar.

(NEXT PAGE: WEBINARS)

Webinars

Choose a focused topic that lends itself to a longer conversation (and will draw enough interest for attendees). Get specific. If your webinar is on retirement planning, make it something like “Retirement Planning 101” or “5 Things Every Retiree Needs to Know.”

Webinar Topic Ideas	
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Choose a member of your team with expertise in this area (and a little bit of charisma) to host.

- » Another option here is to have a recognized expert either speak in your webinar or do a guest interview. Is there a voice in the profession you’re connected with? Someone with a book credit or at least a few magazine publishing credits might work. For instance, Carson Partners can book speakers like retirement expert Jamie Hopkins to speak at their events or on webinars.

Potential Hosts	
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Get a designer to lay out your deck. If you don’t know a designer yourself, you can easily find one on a website like [Fiverr](#) or [Upwork](#) who will do the work at a reasonable rate.

Make sure your tech is up and running well. Then check it again. Then give it one more look-see. The #1 problem people run into with webinars is tech issues because they weren’t familiar with the software before starting.

Use a moderator to open and close and signal to the audience that Q&A has begun.

Save the webinar and post it on your website as an on-demand webinar.