Email List Builder

Lead Magnet Creation	Your Response
What will your lead magnet be called?	
What topic or problem will it solve for potential investors?	
What format will it take? (PDF, Checklist, Video, etc.)	
How will users access or download it?	

Email Sign-Up Audit

Where is your sign-up form currently located on your site?	
What can be improved about its visibility?	
How are you currently collecting emails offline?	

Segmentation Strategy

What are 3 key investor segments you want to track?	
What form questions will you use to capture this segmentation?	
How will you tag or organize contacts by segment?	

Campaign Drafting

Sample Subject Line:	
Sample Body Copy (brief):	
Call-To-Action (What do you want the reader to do?):	
Visual/Attachment to include:	

Monthly Content Calendar

Week 1 Theme:	
Week 2 Theme:	
Week 3 Theme:	
Week 4 Theme:	

Analytics Review

What is your target Open Rate?	
What is your target Click-Through Rate?	
What platform will you use to track replies and engagement?	
How frequently will you check these metrics?	