

AUTOMATE & PERSONALIZE — BUILD A NURTURE SYSTEM THAT RUNS ON AUTOPILOT

IF YOU'RE STILL SENDING FOLLOW-UPS MANUALLY,
YOU DON'T HAVE A BUSINESS — YOU HAVE A HOBBY.

NURTURE SYSTEM

INSTRUCTIONS:

You've built your 5-part nurture sequence.
Now it's time to automate it — so every new
lead gets your best follow-up **24/7**, even
while you sleep.

This worksheet will help you:

1. Set up your automation in your CRM or email platform
2. Add personalization so it feels human, not robotic
3. Create basic tagging and triggers to separate hot vs cold leads
4. Build a repeatable, scalable system

THE GUIDE:

STEP 1:

Choose Your Platform

Fill in the blank:

I'll be automating this sequence
inside _____.

*Example: "Mailerlite / HubSpot /
ActiveCampaign / GoHighLevel."*

STEP 2:

Upload Your Emails

- ☐ Paste your 5 emails into
your automation tool.
- ☐ Add your subject lines
and sender name.
- ☐ Preview every email
before saving.

*(Pro tip: send a test email to yourself
— always read it like a subscriber.)*

STEP 3:

Set the Timing

Fill in the blank:

Email 1 → sends immediately
Email 2 → after ____ days
Email 3 → after ____ days
Email 4 → after ____ days
Email 5 → after ____ days

(Example: Day 0, 1, 2, 4, 6)

STEP 4:

Add Personalization

Multiple choice:

Which personalization tags will I
include?

- ☐ First Name
- ☐ Offer Name
- ☐ Location / Industry
- ☐ Referral Source

*(Example: "Hey {{first_name}}, I
saw you grabbed our
{{lead_magnet}}...")*

STEP 5:

Build Tagging Rules

Fill in the blank:

When someone opts in, tag
them as _____.
(Example: "lead-magnet-download")

When someone books a call, tag
them as _____.
(Example: "qualified-lead.")

When someone stops opening,
tag them as _____.
(Example: "cold.")

STEP 6:

Create Conditional Branches (Optional)

- ☐ If they **book a call**, stop
the nurture sequence.
- ☐ If they **don't open 3
emails**, move them to a
re-engagement
sequence.
- ☐ If they **click**, trigger a
"hot lead" notification.

*(Example: HubSpot workflows,
GoHighLevel automations, or Zapier
triggers.)*

STEP 7:

Add Notifications for Yourself

Fill in the blank:

When a lead clicks or books, I'll
get notified via _____.

(Example: "SMS or Slack webhook.")
You need to know the second
someone bites.

STEP 8:

Build a "Reheat" Rule

Fill in the blank:

Every ____ days, I'll automatically
re-engage cold leads with a
story, update, or case study.

(Example: "Every 30 days.")

STEP 9:

QA Before Launch

Checklist:

- ☐ All links work
Tags trigger properly
- ☐ Emails display correctly
on mobile
- ☐ No typos or missing
merge fields
- ☐ You've tested from
opt-in → last email

STEP 10:

Hit Launch & Celebrate

Fill in the blank:

My nurture automation goes live
on _____.

(Example: "Friday at 10AM.")

Why It's Important:

Most solopreneurs lose leads because they don't
follow up fast enough. Automation fixes that forever.
Once this is live, every new lead gets nurtured
instantly, and your inbox starts filling itself.

**Your automation is live — congrats.
You've just built a system that turns every
new subscriber into a conversation.**

**Next up: we'll combine everything into *The
7-Day Inbox Conversion Playbook* — your
complete nurture system in one guide.**

**Want help setting up your automation?
Book a free strategy session:**

square1grp.com/brainstormsession