



PROFESSIONAL & PREMIUM

# How to Build a **Funnel** Inside dAIsy

No ClickFunnels needed. A complete lead capture funnel — from blank page to live, capturing leads directly into your CRM.

**What you'll have by the end of this guide:** A live landing page that captures name, email, and phone. Leads flow automatically into your dAIsy CRM and trigger your New Lead Welcome Sequence. No code, no third-party tools, no monthly fee for a separate platform.

## What a Funnel Does (And Why It Matters)

A funnel is a sequence of pages designed to move a visitor from curiosity to commitment. In the context of a service business, the most powerful funnel is usually the simplest: one landing page that captures a lead, followed by a thank-you page that sets expectations.

Page	Purpose	What's On It
Landing Page	Capture the lead	Headline, one key benefit, lead capture form (name, email, phone), one CTA button
Thank You Page	Confirm and direct	Confirmation message, booking link ('Book your free call'), what happens next

## Step 1: Create Your Funnel

1. Go to [Sites → Funnels → Add Funnel](#)
2. Give it a name (e.g. 'Free Consultation Funnel') and choose your domain or subdomain
3. Add Step 1: Name it 'Landing Page', URL path: [/free-consultation](#)
4. Add Step 2: Name it 'Thank You', URL path: [/thank-you](#)

## Step 2: Build Your Landing Page

Click Edit on Step 1 to open the page builder. Here is the exact structure to use.

### Section 1: Hero (top of page)

- **Headline:** [SPECIFIC RESULT] for [TARGET CLIENT]. Example: "More Bookings, Less Chasing for Tradespeople in [Your Area]"
- **Subheadline:** one sentence expanding on the headline. What do they get? What does it cost? What's the risk?
- **CTA Button:** "Book Your Free 20-Minute Call" or "Get Your Free Quote" — links to the form below or scrolls down to it
- **Hero image or video:** a photo of you, your team, or your work. Authenticity converts better than stock photos.

## Landing Page, Continued

The remaining sections of your landing page structure.

### Section 2: The Problem (empathy)

- 2–3 short statements describing the frustration your ideal client feels before they find you
- Examples: "Spending hours chasing leads that go cold?" / "Missing calls when you're on the tools?" / "Losing jobs to competitors who reply faster?"
- This section shows you understand their world. When they read it and think "yes, that's me" — they keep reading.

### Section 3: The Solution (your offer)

- 3 bullet points describing what they get when they work with you
- Format: Icon + Bold headline + 1-line description
- Keep it outcome-focused, not feature-focused: "Never miss a lead again" not "Automated SMS reply system"

### Section 4: Social Proof

- 2–3 short testimonials from real clients. Include their name, business type, and a photo if possible.
- If you don't have testimonials yet, use a results statement: "Our clients typically [achieve X] within [timeframe]"
- Star ratings from Google (screenshot as image) add credibility immediately

### Section 5: The Form (lead capture)

- Form fields: First Name, Last Name, Email, Phone Number
- In dAIsy's form builder: drag a Form element, connect it to your CRM, map each field to the corresponding contact field
- CTA Button text on the form: "Book My Free Call" or "Get My Free Quote" — NOT "Submit"
- On form submission: redirect to your Thank You page
- In the form settings: add tags automatically — e.g. Source: Website, Status: New-Lead

## Step 3: Build Your Thank You Page

This page appears immediately after someone submits the form. It does three things: confirms their submission, tells them what happens next, and gives them an immediate action to take.

- **Headline:** "You're booked in, {{contact.first\_name}}!" or "We've got your details — here's what happens next"
- **Body:** "[Your Name] will be in touch within [timeframe]. In the meantime, if you'd like to skip the queue and book a call directly, here's my calendar:"
- Embed your dAIsy booking calendar directly on this page — [Sites → embed Calendar element](#)
- This is your fastest path to a booked call. Many visitors will book immediately.

## Step 4: Connect Your Automation

When someone submits your form, dAIsy should automatically:

1. Create a contact record in your CRM with their details
2. Add them to the appropriate pipeline stage (New Enquiry)
3. Apply tags (Source: Website, Status: New-Lead)
4. Trigger your New Lead Welcome Sequence (the 5-touch follow-up)

This is handled in the [Form settings → Actions](#) tab. Add these actions and they fire on every form submission.

## Step 5: Publish and Promote

Where to Share Your Funnel	How
<b>Social media bio</b> (Instagram, Facebook, LinkedIn)	Replace any other links with your funnel URL
<b>Google Business Profile</b>	Add as your primary website or as a service URL
<b>Email signature</b>	Add as a text link: "Book a free 20-min call with me"
<b>Paid ads</b> (Facebook, Google)	Your funnel URL is the ad destination
<b>SMS campaigns in dAIsy</b>	Include the funnel URL as your CTA in broadcast messages
<b>Existing website</b>	Add a prominent button: "Book a free call" linking to your funnel

### Conversion Benchmark

A well-built landing page for a service business should convert 15–25% of visitors into leads. If your conversion rate is below 10%, the most common fix is improving your headline or adding more social proof. Test one change at a time.