

★ AUTOMATESCALE

52 AI Marketing Tactics The Card Deck.

One play per card. Five suits across the funnel.
The tactics Adam runs on \$10M+ client systems.



01



CAPTURE

Quiz-Funnel ICP Scoring

10



Quiz-Funnel ICP Scoring

A 6-question quiz scores leads before they hit your inbox. Each answer maps to an MRR + intent score. High scorers route to apply, low scorers go to nurture.

HOW TO APPLY

GHL Surveys → tag by score → branch automation.

02



CAPTURE

**Multi-Step Micro-Friction
Form**

02



Multi-Step Micro-Friction Form

Break a 7-field form into 3 micro-steps. Each step has its own progress bar. Completion lift: 2-4x.

HOW TO APPLY

Step 1: name+email. Step 2: industry+size.
Step 3: budget+intent.

03



CAPTURE

Behavioral Intent Trigger

03



Behavioral Intent Trigger

Visitor scrolls past pricing section → fire a soft CTA banner. Visitor reads 3 case studies → show full apply form. Behavior > demographics.

HOW TO APPLY

GHL Triggers + Cookie tracking + scroll depth events.

04



CAPTURE

Exit-Intent Rescue Offer

to



Exit-Intent Rescue Offer

Mouse heads to close tab → show a 1-question survey ('what stopped you?') with email capture. Recovers 8-15% of lost sessions.

HOW TO APPLY

JS exit-intent + dedicated capture form + dynamic offer based on page.

05



CAPTURE

Conversational Capture

50



Conversational Capture

Replace static forms with a chat-style flow. AI agent asks one question at a time. Feels human, captures more.

HOW TO APPLY

Chatbot widget → JSON payload → GHL contact + tags.

06



CAPTURE

Progressive Profiling

90



Progressive Profiling

Don't ask for everything up front. First visit: email only. Second visit: name + company. Third: budget + timeline. Each touch reduces friction.

HOW TO APPLY

Cookie-tracked field display + GHL contact merging.

07



CAPTURE

**Source Attribution Baked
In**

Lo



Source Attribution Baked In

Every CTA carries a ?source= param. Form submits include the source. You know which page converted, not just which campaign.

HOW TO APPLY

Sitewide href tagging + form hidden fields +
GHL custom field.

08



CAPTURE

Honeypot Anti-Spam

80



Honeypot Anti-Spam

Hidden form field that bots fill but humans don't. If it's filled, reject silently. Stops 95% of form spam without CAPTCHA friction.

HOW TO APPLY

. Reject submissions where it's not empty.

09



CAPTURE

Magnetic CTA Copy

60



Magnetic CTA Copy

Verbs > nouns. 'Get my audit' beats 'Submit'.
'See my score' beats 'Continue'. Pronoun matters: 'my' > 'your'.

HOW TO APPLY

A/B test button copy. Single-word changes lift CR 10-30%.

10



CAPTURE

Real-Time Field Validation

01



Real-Time Field Validation

Email format wrong? Show inline before submit. Phone missing area code? Inline. Reduces submit-error abandonment.

HOW TO APPLY

JS pattern validation + descriptive inline errors + ARIA-live.

11



QUALIFY

MRR Gating

11



MRR Gating

Ask MRR/revenue range. Below threshold → free playbook + newsletter. At threshold → calendar. Stops you from selling to people who can't buy.

HOW TO APPLY

Form has revenue dropdown. Branch automation by tier.

12



QUALIFY

Velocity Scoring

12



Velocity Scoring

How fast did they fill the form? 30 seconds = high intent. 5 minutes = low. Use time-to-complete as a score signal.

HOW TO APPLY

Timestamp form open + submit. Difference becomes a score field.

13



QUALIFY

Email Domain Heuristics

13



Email Domain Heuristics

Gmail = solo founder. Company domain = team. .edu/.gov = different ICP. Route differently from the first second.

HOW TO APPLY

Regex on email domain → tag → pipeline branch in GHL.

14



QUALIFY

LinkedIn Enrichment Lookup

14



LinkedIn Enrichment Lookup

Person fills form → background API call enriches with LinkedIn data (role, company size, industry). You see context before reply.

HOW TO APPLY

Worker calls Apollo/Clearbit on form submit → appends to GHM note.

15



QUALIFY

**Self-Scoring
Questionnaire**

15



◆ · QUALIFY · 15

Self-Scoring Questionnaire

Ask 6 yes/no questions. Each yes = 1 point. Display their score on submit. They self-qualify; you don't have to.

HOW TO APPLY

Form logic + dynamic thank-you page showing score + tiered next step.

16



QUALIFY

**Disqualification Increases
CR**

91



Disqualification Increases CR

People want to belong. Telling them the criteria for being in the right group makes them want in.

HOW TO APPLY

Add a step that says 'this isn't for you if X'. Counterintuitively raises conversion 2-3x among qualified leads.

17



QUALIFY

Pre-Call Commitment

41



Pre-Call Commitment

Before booking, ask 'what's the biggest result you'd want from this call?'. Forces them to articulate value. Reduces no-shows 40%.

HOW TO APPLY

Required text field on calendar booking form.

18



QUALIFY

Calendar-First Routing

81



◆ · QUALIFY · 18

Calendar-First Routing

Skip the qualification form. Send qualified leads straight to your calendar with pre-filled fields. Friction kills momentum.

HOW TO APPLY

Tagged contacts get direct calendar link via email instead of apply page.

19



QUALIFY

**Tier-Based Pipeline
Assignment**

61



Tier-Based Pipeline Assignment

MRR < \$5K → DIY tier. \$5-50K → Growth tier. \$50K+ → Scale tier. Each tier has its own pipeline + offer + close ratio.

HOW TO APPLY

GHL custom field + 3 pipelines + auto-routing rule.

20



QUALIFY

Source-Weighted Scoring

20



◆ · QUALIFY · 20

Source-Weighted Scoring

Lead from referral = +30 points. From cold ad = +10. From organic search = +20. Source predicts close rate better than demographics.

HOW TO APPLY

Initial score = source weight + form fields. Sort pipeline by score.

21



FOLLOW-UP

3-Touch Heartbeat

21



♥ · FOLLOW-UP · 21

3-Touch Heartbeat

Hour 1: confirmation email. Hour 24: 'here's what to read next'. Hour 72: 'questions?'. Three contacts in 72 hours, then breathe.

HOW TO APPLY

GHL workflow with timed delays. Each email is fresh content, not nag.

22



FOLLOW-UP

SMS Within 60 Seconds

22



♥ · FOLLOW-UP · 22

SMS Within 60 Seconds

Form submitted → SMS fires within 60s: 'Got it. You'll hear back today.'. Response rate to immediate SMS: 8x vs 24h reply.

HOW TO APPLY

GHL workflow → SMS trigger with token-substituted name.

23



FOLLOW-UP

Dynamic Email Branching

23



♥ · FOLLOW-UP · 23

Dynamic Email Branching

Did they click the link in email 1? Send email 2A. Didn't click? Send email 2B with different angle. Branching beats linear.

HOW TO APPLY

GHL If/Else action on email opens + clicks.

24



FOLLOW-UP

Re-Engagement Triggers

24



♥ · FOLLOW-UP · 24

Re-Engagement Triggers

Lead silent 14 days → trigger A. Silent 30 days → trigger B. Silent 90 → win-back C. Time decay tells you who's slipping.

HOW TO APPLY

GHL inactivity triggers + dedicated win-back sequences.

25



FOLLOW-UP

Voice Agent Answering

25



♥ · FOLLOW-UP · 25

Voice Agent Answering

Inbound call to your number → AI agent answers, takes message, books appointment, tags hot vs cold. 24/7 coverage.

HOW TO APPLY

Twilio + voice agent platform + GHL contact write-back.

26



FOLLOW-UP

Pre-Meeting Briefing

26



♥ · FOLLOW-UP · 26

Pre-Meeting Briefing

Lead books call. 1h before, email with: their answers, your prep notes, recommended pre-read. Both parties show up sharp.

HOW TO APPLY

GHL booking trigger → templated brief with merge fields.

27



FOLLOW-UP

Post-No-Show Recovery

27



♥ · FOLLOW-UP · 27

Post-No-Show Recovery

Missed appointment → SMS within 5 min:
'Hey, looks like we crossed wires. Want to reschedule?' + 1-click reschedule link. Saves 30% of no-shows.

HOW TO APPLY

GHL no-show trigger + SMS + calendar widget link.

28



FOLLOW-UP

Multi-Channel Orchestration

28



♥ · FOLLOW-UP · 28

Multi-Channel Orchestration

Email, SMS, voice, push — all coordinated. If they read the email, suppress the SMS. Stop wasting touches.

HOW TO APPLY

GHL workflows with channel-state checks before each step.

29



FOLLOW-UP

AI-Assisted Reply Drafts

29



AI-Assisted Reply Drafts

Lead asks question → AI drafts a personalized reply pulling from their context + your knowledge base. You approve + send.

HOW TO APPLY

Worker reads inbound → calls LLM with RAG → posts draft to GHL conversation.

30



FOLLOW-UP

Calendar Reminders That Convert

30



♥ · FOLLOW-UP · 30

Calendar Reminders That Convert

Default reminders say 'meeting at 3pm'.
Better: 'Adam will go over your X. Bring Y.
Prep Z.'. Specific reminders > generic ones.

HOW TO APPLY

Custom reminder template per calendar in
GHL.

31



CONVERT

Risk-Reversal Guarantees

13



Risk-Reversal Guarantees

Specific is believable. '90-day money back' < '90-day Scale Guarantee: hit X metric or we work free until you do'. Specificity converts.

HOW TO APPLY

Write the guarantee as a sentence in the apply page. Repeat in proposals.

32



CONVERT

Social Proof Rotation

32



Social Proof Rotation

Don't show the same 3 testimonials forever. Rotate from a pool of 50+. Different visit, different proof. Smells alive.

HOW TO APPLY

JS rotator on randomized subset of testimonials per page load.

33



CONVERT

**Pricing Reveal
Sequencing**

33



Pricing Reveal Sequencing

Don't show price until they've absorbed value. Hide pricing behind a 'See pricing' click. CR up 20-40% for high-ticket offers.

HOW TO APPLY

Toggle-reveal section on pricing page. Track click as engagement event.

34



CONVERT

**Objection-Handling
Sequences**

34



Objection-Handling Sequences

Pre-handle the top 5 objections in pre-call emails. By call time, prospect has answered most concerns themselves.

HOW TO APPLY

5-email sequence between booking and call.
Each email = one objection.

35



CONVERT

Limited-Availability
Framing

35



Limited-Availability Framing

'Q3 has 5 slots' beats 'limited spots'.
Specific scarcity is believable. Generic
scarcity is ignored.

HOW TO APPLY

Dynamic slot counter tied to actual GHSL
pipeline capacity.

36



CONVERT

Buyer-Stage Tag Routing

36



Buyer-Stage Tag Routing

Cold → educate. Warm → demo. Hot → close. Each stage gets different copy + CTA + cadence. One funnel = leaving money on the floor.

HOW TO APPLY

GHL tags + tag-based email branches + tag-based CTA on site.

37



CONVERT

**Auto-DocuSign for
Contracts**

37



♣ · CONVERT · 37

Auto-DocuSign for Contracts

Verbal yes → DocuSign fires within 2 min.
Speed kills hesitation. Friction kills deals.
Automate the contract.

HOW TO APPLY

GHL pipeline stage → DocuSign webhook →
templated contract.

38



CONVERT

**Stripe-First Payment
Flow**

83



♣ · CONVERT · 38

Stripe-First Payment Flow

Signature + payment in the same flow. Don't make them sign today and pay next week. Same window, same friction budget.

HOW TO APPLY

DocuSign 'pay-via-link' field connected to Stripe Checkout.

39



CONVERT

Onboarding Video Drip

68



Onboarding Video Drip

Day 1: 'welcome, here's the next step'. Day 3: 'here's your first win'. Day 7: 'here's how the system pays you'. Tee up activation early.

HOW TO APPLY

GHL post-purchase workflow with 3 videos + check-in tasks.

40



CONVERT

Confirmation Page Upsell

07



♣ · **CONVERT** · 40

Confirmation Page Upsell

Just bought? Show a one-time upsell at 50% off on the confirmation page. Highest-converting moment in the entire funnel.

HOW TO APPLY

Stripe Checkout → custom thank-you with upsell offer + 1-click add-on.

41



RETAIN

Churn-Risk Scoring

41



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Churn-Risk Scoring

Low logins + skipped emails + missed standups = high churn risk. Score it. Trigger save-attempt 30 days before they'd cancel.

HOW TO APPLY

Behavioral metrics → daily score → GHL pipeline stage 'at-risk'.

42



RETAIN

Usage-Based Win-Back

42



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Usage-Based Win-Back

Customer hasn't used core feature in 14 days → send personalized 'here's a 1-click setup' email. Use beats nag.

HOW TO APPLY

Product webhook → GHL tag → conditional email with feature link.

43



RETAIN

NPS Feedback Loops

43



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NPS Feedback Loops

Quarterly NPS to all customers. 9-10 → ask for referral. 7-8 → ask 'what would make it a 10?'. 0-6 → trigger save call.

HOW TO APPLY

GHL NPS widget + 3-branch automation by score.

44



RETAIN

**Customer Health
Dashboard**



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Customer Health Dashboard

One screen, all customers. Color by health. Red customers get a touch this week. Yellow get a quarterly check. Green get celebrated.

HOW TO APPLY

Internal dashboard pulling GHL + product data. Sortable by health score.

45



RETAIN

**Renewal-90-Days-Out
Trigger**

45



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Renewal-90-Days-Out Trigger

90 days before renewal → start the conversation. Don't surprise them with an invoice. Plant the renewal story now.

HOW TO APPLY

GHL date-anchored trigger 90 days before contract end → CSM outreach task.

46



RETAIN

**Loyalty Milestone
Celebrations**

97



★ · RETAIN · 46

Loyalty Milestone Celebrations

30 days, 90, 180, 365. Each milestone gets a 'we noticed' touch. Tiny investment, huge perception lift.

HOW TO APPLY

GHL workflow on contract-start date + N-day delays + custom email.

47



RETAIN

Referral Activation Sequences

47



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Referral Activation Sequences

Customer hits a result milestone → ask for referral within 7 days. Joy is fleeting; capture it. Tie ask to win, not anniversary.

HOW TO APPLY

Trigger on completed milestone → branded referral landing page.

48



RETAIN

**Win-Back After
Cancellation**

87



★ · RETAIN · 48

Win-Back After Cancellation

Cancelled customer ≠ dead customer. 90-day follow-up: 'here's what's changed'. 30% come back within a year if treated well.

HOW TO APPLY

Cancelled-stage workflow with 90-day delayed reactivation email.

49



RETAIN

**Customer Success
Automation**

67



★ · RETAIN · 49

Customer Success Automation

First-result video. First-question response. First-win celebration. The first 30 days predict the next 30 months.

HOW TO APPLY

GHL onboarding workflow tied to first activations + product webhooks.

50



RETAIN

LTV Projection

50



★ · RETAIN · 50

LTV Projection

Score each customer's projected lifetime value daily. Invest disproportionately in the top 20%. Stop spending equally on everyone.

HOW TO APPLY

MRR + tenure + product depth → LTV model → segmentation tag.

51



INFRA

**RAG-Powered Reply
Engine**

19



RAG-Powered Reply Engine

Every inbound message → AI looks up your docs, past convos, and customer's history → drafts a context-rich reply in 2 seconds.

HOW TO APPLY

Pinecone (RAG) + GHL conversation hook + LLM with structured context.

52



INFRA

Agent Layer Above CRM

52



Agent Layer Above CRM

Don't bolt agents onto your CRM. Make them a layer ABOVE it. Each agent owns a stage. Each stage owns a metric. The CRM is just storage.

HOW TO APPLY

GHL = data plane. Workers/n8n = agent plane.
Agents read + write GHL via API.