

THE COMPLETE

# SUBSTACK STARTER GUIDE

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*Your complete training companion for building a thought leadership platform,  
growing your audience, monetizing your voice, and creating  
white glove subscriber relationships on Substack*

**50 NOT FINISHED | JULIE CIARDI**

Substack Soapbox Membership

*This is a living document — updated with each new training.*

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*You don't pick a niche — you pick a soapbox. You stand on it, you speak what you are here to speak, and your niche gathers around you.*

## Module 1: The Big Reframe — What Substack Actually Is

Substack is widely misunderstood as “just a newsletter” or “just blogging.” It is so much more than that. Substack is a central home base and hub for growing a coaching or transformational business. It is your soapbox — the place where you can speak from the heart and connect with real humans.

### The Two-Part Advantage

#### Advantage #1: Organic Growth Is Possible Again

- Content has longevity here — older posts keep bringing in new subscribers long after they’re published.
- Instagram grows followers; Substack grows email subscribers, which means a deeper, more valuable relationship.
- The algorithm rewards reciprocity and matchmaking — the more you engage with content that fits your niche, the more Substack surfaces your content to aligned readers.

#### Advantage #2: It’s an All-in-One Toolkit

Substack can replace or simplify much of your existing tech stack: website and home base, landing pages, email newsletter system, podcast hosting, live video and streaming, content hub and archives, paid community space, and shareable promo assets.

### The Culture Shift

People here want depth. They don’t want your one-minute reel. Comments are real conversations — not drive-by emojis. The “no ads” environment is calmer and supports creativity and nervous system regulation. This platform is built for connection and community.

*Substack is not another social platform. It’s a new way to do online business. If we were a brick-and-mortar company, your Substack is now the brick and mortar — it’s where the business is done.*

### What Works Here vs. What Doesn’t

#### What Doesn’t Work

- Copy-pasting content from other platforms.
- Aesthetic selfie Instagram-style posts.
- Guru-on-a-pedestal energy or telling people what to do.
- Pontificating or being “tippy” with tips and tricks.

## What Does Work

- Conversations, not broadcasts. Use “I / we / our” more than “you should.”
- Sharing what you feel, believe, and are experiencing — not just teaching.
- Engaging, responding, and building genuine relationships.
- Conviction-based content that speaks to your person.

⇒ *Quick Rewrite Practice: Take one “Instagram-style” line and convert it to Substack tone.*  
*Before (broadcast voice): “You need to \_\_\_\_\_.”*

*After (relational voice): “I’ve been noticing \_\_\_\_\_.”*

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## Module 2: Getting Started — Your First Five Steps

You don’t need to figure it all out first. You don’t need it to be perfect. Your welcome emails, website, and publication can all be the default template at first. Just start — and iterate over time.

### The 5 Simple Steps

1. Create your profile (real photo, your name, bio describing who you help and what you stand for).
2. Create your publication (this will house your long-form posts and articles).
3. Start writing Notes (short-form, conversational, soapbox moments).
4. Engage on other people’s Notes and Posts (this is where reciprocity starts).
5. Create your first article (one clear topic, written like a conversation, ending with a question).

### Profile Setup Checklist

- Profile photo that looks like me (not a logo)
- Name shows as my name (human connection matters here)
- Bio: who I help + what I stand for + what I write about
- Publication name reflects my brand or topic (not just my name)

### The Reciprocity Rule

Substack is reciprocal. If you're not going to engage and respond, it won't work. Respond to every comment. Restack other people's work. Comment thoughtfully. Mention people in your Notes. Share quotes from others' posts. Do collaborative articles or lives. This is human-to-human business again.

## Realistic Growth Timeline

### Month 1 (December Example)

- Set up profile, banners, publication.
- Write one article.
- Post a handful of Notes and engage on others.

### Month 2 (January Example)

- One article per week, promoted on other platforms.
- 1–3 Notes per day, engaging daily for 30 minutes.
- Conviction-based Notes start to gain traction.
- Set up paid tiers at end of month; begin emailing your list.

### Month 3 (February Example)

- Promote a live event to drive interest in the paid tier.
- Email warm audience on Instagram, Facebook, and LinkedIn.
- Host a live event; reach bestseller status.

*It takes time to gain momentum. You can't look at this as a platform you want instant results from. Your energy and your frequency on this platform are critical.*

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## Module 3: The Substack Soapbox™ System

The Soapbox System is built on the idea that you don't pick a niche — you pick a soapbox. You step on it, speak what you are here to speak, and your niche gathers around you. There is no better platform to soapbox on than Substack.

### The Soapbox System Components

#### 1. Your Human Design (Her Profit Map™)

Your Human Design reveals how you are naturally designed to lead, communicate, and build your business. It shows your Profile (public role), your Voice, your Type (energy), and your Tribe (how people gather around your work).

## 2. Your Convictions

Your convictions become the heart of your thought leadership — what you deeply believe about your work, what you challenge in your industry, what you want to change or shift for your audience, and the transformation you are here to lead.

## 3. Your 4 Content Pillars of Conviction

Each pillar includes:

- The big idea you are known for
- The perspective shift you bring to the market
- The problem you help people see differently
- The solution or philosophy you stand behind

## Authority of One™ Messaging Pillars

Create at least 3–4 of these messaging pillars:

- Conviction — the thing you see as wrong, an injustice to your niche
- Perspective Shift — offering a totally new way to look at the issue
- Big Idea — the solution to make the perspective shift a reality
- Stories — to show evidence of the above

All of your Substack strategy can revolve around this approach. Who you engage with, follow, curate your feed around, and collaborate with should fit within these pillars.

📝 *My 4 Content Pillars:*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

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# Module 4: Your Human Design + Her Profit Map™

Inside the membership, we use the Her Profit Map™ as a practical tool — think of it like StrengthsFinders or Myers-Briggs but applied to your calling, your convictions, and your legacy work on Substack.

## What Your Her Profit Map Reveals

- Your Profile — the public role you are meant to embody in your brand

- Your Voice — how your message is designed to be expressed
- Your Type — how your energy works in business
- Your Tribe — the way people naturally gather around your work
- Your Core Four frequencies and Superpowers
- Your Communication Center (Voice by Design)

## How to Use It With the Julie Bot™

The Julie Bot™ is a custom AI contemplation partner designed specifically for this work. You reference your Her Profit Map and your convictions, and the bot helps you identify themes in your Human Design that shape your voice, extract the thought leadership embedded in your design, connect those themes with your convictions, and turn them into clear messaging and content ideas.

*The bots are contemplation partners. They are not your authority. You are your own authority and your own writer of your thought leadership.*

## Inputs for the Julie Bot

From your Her Profit Map, gather:

- Your Type
- Your Profile (Public Role)
- Your Core Four frequencies (Sun, Earth, on both sides)
- Your Communication Center gates
- Your Superpowers (Channels)

⇒ *My Human Design Type:*

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⇒ *My Profile (Public Role):*

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⇒ *My Core Four:*

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⇒ *My Communication Center Gates:*

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## Module 5: The Substack Soapbox Prompt Guide

Use these prompts step by step with the Julie Bot to build your Substack Soapbox from your Human Design and convictions.

### **Step 1: Orientation — Your Current Business + Thought Leadership**

Paste this prompt into the GPT: “Before we dive into my Human Design and Substack strategy, help me clarify my current business and thought leadership. Here is my current context: my niche or industry, my dream client, the transformation or result I help people get, my current offers or programs, my stage of business, and what I feel most called to talk about right now. Based on this, help me start identifying the themes of my future Substack.”

### **Step 2: Share Your Human Design**

Share your Type, Profile, Core Four frequencies, Communication Center gates, and Superpowers. Ask: “Help me understand how these might shape my thought leadership and Substack voice.”

### **Step 3: Identify Your Convictions**

Ask the bot to help you uncover: What do I believe is broken in my industry? What needs to change? What do I stand for? What do I refuse to participate in? What truth do I feel called to speak?

### **Step 4: Define Your Substack Soapbox**

Ask it to help articulate: The big idea you stand for, the industry belief you challenge, the perspective shift you want your audience to experience, and the movement or tribe you are building.

### **Step 5: Create the 4 Substack Content Pillars**

For each pillar, define: the conviction behind it, the big idea you teach, the problem you address, the perspective shift you create, and examples of posts you could write.

### **Step 6: Align Your Voice + Writing Style**

Based on your Profile and Communication Center, define your natural tone, teaching style, the types of stories to tell, and how your voice naturally attracts your tribe.

### **Step 7: Generate Post Ideas**

Ask for: 20 article ideas, 5 strong soapbox posts, 5 personal story posts, 5 teaching posts, and 5 movement-building posts.

### **Step 8: Your Positioning Statement**

Complete this framework:

“My Substack is where I explore \_\_\_\_\_. I write for \_\_\_\_\_ who want \_\_\_\_\_. Together we challenge the belief that \_\_\_\_\_. Instead, we believe \_\_\_\_\_. Through this Substack I help my readers \_\_\_\_\_.”

⇒ *My Positioning Statement:*

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## Step 9: Long-Term Thought Leadership

Ask the bot to help you understand what topics to return to repeatedly, what ideas could become signature frameworks, and what themes could evolve into books, programs, or movements.

| *Remember to ask the Bot to save all your work into a document you can then save!*

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## Module 6: Publication Layout + Design

Think of your publication page as your web page. You are driving traffic to this page. You want anyone landing there to immediately understand who you are, what you offer, and what their next step is.

### Your Pinned Hero Post

The default Substack view shows your most recent post at the top. You don't want that. You want a pinned introduction post that creates a “welcome to my world” experience for first-time visitors. You can now pin more than one post.

**Your pinned hero post should include:**

- A warm introduction — who you are and why you're here
- An audio embed (meet people where they are)
- A brief backstory or “why Substack” section
- Your 4 content pillars — clearly named
- A free opt-in or resource
- Your paid tier — introduced naturally, not pushed
- A question that invites engagement
- A custom CTA button with your primary call to action

### How to Pin + Style Your Hero

1. Find the post and click the three-dot menu, then “Pin to Homepage.”

2. Go to Dashboard > Website Editor and click your hero block.
3. Choose “Media Feature” for a bold, website-style hero.

## The Subscribe Block

You can add subscribe blocks anywhere on your page that automatically show different messages depending on who is viewing. Customize three messages:

- Non-subscribers: Goal is to get them to subscribe.
- Free subscribers: Goal is to invite them to upgrade.
- Paid subscribers: Goal is to invite them to gift a subscription or take the next step.

To add: Dashboard > Website Editor > Click to Add a Block > Subscribe Block.

## Organizing by Content Pillar with Tags

Every article you publish gets one tag — the name of the content pillar it belongs to. Substack then lets you create a featured section for each tag, automatically populating it with all articles in that category.

1. Define your 4 tag names (matching your content pillars; keep them short).
2. In Website Editor, add a “Post and Modules” block (grid layout, 1 row).
3. Set it to filter by tag and select your pillar tag.
4. Click “Use Override” and type a custom display title.
5. Repeat for each of your 4 pillars.

*Use one tag and one tag only per article. This keeps your sections clean and auto-organized. Every time you post something new and tag it, it automatically appears in the right section.*

### Bonus: A Resources Section

Create a special tag called “resources” for posts you don’t broadcast to subscribers — these live on your publication for navigation. Use this section to feature your podcast, free downloads, links to your social profiles, or other evergreen resources.

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## Module 7: Embedding Your Call to Action

Your publication page sets the stage, but the real magic happens inside your articles. Every article is an opportunity to naturally guide readers to their next step. This is not bro marketing. This is generous, value-first leadership.

## Know Your Strategy First

⇒ *What is the single most important action I want a new visitor to take?*

- Join my paid tier / subscription
- Book a free consult or discovery call
- Download a free report / resource
- Register for an upcoming workshop
- Subscribe free to grow my list
- Other: \_\_\_\_\_

⇒ *My Primary CTA URL:*

⇒ *My CTA Button Label:*

## Adding Custom Buttons to Articles

1. Place your cursor where you want the button (often near the end, or after a key teaching moment).
2. Click the + button and select “Button” > “Custom Button.”
3. Paste the full URL (must include https://) and write a clear, action-oriented label.

## The Weekly Content Strategy

Format	Purpose + CTA Connection
Podcast (Tue)	Lead with value on your pillar topic. Mention your upcoming event, paid tier, or offer naturally.
Free Live (Wed)	Teach in public. Demonstrate expertise. Direct people to the paid tier at the end.
Article (Thu)	Transcribe or expand the live. Add a custom button pointing to your primary CTA. Tag it with its pillar.
Notes (ongoing)	Short-form soapbox moments. Pull a quote, a conviction, or an insight. Restack your own gold.

## Restack Your Own Gold

One of the most underused features on Substack is restacking your own content. When you restack an article or a key quote from your own publication, it shows up in the main feed as a note — putting your ideas in front of new eyes without writing anything new.

- Restack a full article: Pull it into your notes feed.

- Restack a quote: Highlight a sentence, choose “Share,” and restack as a styled note with a caption.

Both drive people back to your original article which has your CTA button embedded. The loop is complete.

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## Module 8: Paid Tiers — Strategy, Setup + Pricing

*You start, and then you perfect. You don't have to be wed to whatever it is — you can continue to evolve it.*

### Start With the End in Mind

Before deciding what your paid tier looks like, get clear on your overall offer ecosystem. Your Substack is the tip of the arrow — a trust-building entry point that leads people into your deeper work.

### Two Angles for Your Paid Tier Content

**Option A:** Something completely different from what you teach in your other programs — a topic that complements but doesn't overlap.

**Option B:** The first domino that needs to fall — content that prepares and primes your subscriber to be ready for your next-level offer.

### Pricing Strategy

- If Substack is a trust-builder leading to higher-ticket offers, keep pricing low enough to be a no-brainer.
- If Substack is your main monetization vehicle, you can price higher.
- Make the annual price a significant discount vs. monthly to encourage commitment.
- Subscribers who join at a price are grandfathered in — great for early adopters.
- Consider skipping the Founding Plan to keep decisions simple for new visitors.

*A confused mind says no. Keep your offer simple so people can make a decision easily.*

### What to Include Beyond Content

- Gated strategy sessions and live trainings
- Downloadable resources (workbooks, guides, templates)
- Custom GPT tools or AI-powered resources
- Audio course or private podcast feed

- Exclusive reports or personalized assessments
- Community space
- Bonus for annual subscribers

## Naming Your Membership

“Become a paid subscriber” is forgettable. A named membership creates identity, community, and excitement.

⇒ *What transformation do I offer my paid members?*

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⇒ *What name feels authentically me?*

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## Platform Setup: Step by Step

1. Go to Dashboard > Settings.
2. Connect your Stripe account to enable payments.
3. Set monthly and annual pricing (make annual a clear discount).
4. Write your paid tier benefits in the “What’s included” section.
5. Create a custom landing page under Settings > Website.
6. Add that custom page to your navigation menu.
7. Add paywalls to content (insert anywhere in a post or page).
8. Save your /subscribe URL: yourname.substack.com/subscribe.

### Key Platform Features

- Paywalls can be placed anywhere — free readers see a teaser; paid members see everything.
- Subscribe buttons auto-update: free subscribers see “Upgrade to Paid” automatically.
- Live scheduling creates a calendar invite for subscribers; you can limit access to paid only.
- Subscriber testimonials are auto-generated by Substack from comments — find them on your Dashboard and screenshot for your About page.
- Substack takes 10% — no other platform fees.

## Paid Tier Revenue Math

Monthly Goal	Subscribers Needed	At Price
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\$5,000/month	250 people	\$20/month
\$10,000/month	500 people	\$20/month
\$20,000/month	1,000 people	\$20/month

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## Module 9: Content Strategy + Repurposing

### The Speak-First Content Workflow

If writing feels hard, speak it first:

1. Record yourself speaking using your phone's voice recorder for 15–25 minutes.
2. Transcribe using TurboScribe (or your preferred tool).
3. Format into an article using Claude — paste your exact transcript and ask it to format as a post in your voice.
4. Embed the audio in the post using the headphones/audio button in the Substack editor.
5. After a live session, Substack auto-generates clips and reels with captions for repurposing.

*Give your audience the option to read or listen. Not everyone wants to read a long article. Audio is a massive missed opportunity on Substack right now.*

### Notes Strategy

Your Notes should revolve around your 4 content pillars. Share spicy, useful, real and raw tidbits, stories, and reflections. Three things to remember:

- Speak to the one person who will resonate with your convictions — it's not about going viral.
- Spend time daily liking, commenting, and restacking others' content — reciprocity drives growth.
- The algorithm is a matchmaker: when someone engages with your content, it pushes more of your Notes into their feed.

### Repurposing Strategy

- Take live transcripts and create articles.
- Reels auto-generated by Substack can be shared to other platforms or used for ads.
- Restack your own best articles and quotes 2–3 times per week.
- Have a team member or VA highlight your best quotes and restack them.

- Cross-post automatically to LinkedIn, YouTube, etc.
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## Module 10: Audio, Podcasting + the Recording Studio

### Embedding Audio in Posts

In any article, click the headphones icon at the top and choose “Audio Embed” to upload an audio file, or “Voiceover” to record directly. This lets readers choose between reading and listening.

### Public vs. Private Podcasts

- Use Substack’s built-in podcast feature for your public podcast. Toggle the podcast setting when publishing — it goes directly to Apple and Spotify.
- Use Hello Audio (or similar) for private podcast feeds for paid members.
- Every live session audio can be added to your private podcast for flexible listening.

### The Substack Recording Studio

A new feature that functions like StreamYard but within Substack. You can record interviews and content with up to 3 people, add your branding, and it auto-generates reels and clips with captions. Recordings must be done on desktop, but guests can join from mobile.

Tip: When recording, save as draft first so you can change the thumbnail, add show notes, and control whether audio goes to your podcast feed.

### Substack TV

Any smart TV can get the Substack TV app. This means your live content and recordings can be consumed on the big screen. Think of it as the potential to create your own show — branded, on your schedule, free for your audience.

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## Module 11: Community Strategy

Community is one of the most important pieces of a thriving paid membership. Currently, Substack’s native community tools (chat and comments) are limited for deep engagement.

### Current Options

Platform	Best For	Considerations
Substack Chat	Simple Q&A, replay comments	Limited; can feel disconnected
Private App (Kajabi, etc.)	Deep community tied to programs	Platform jump required; great if you have a main program
Circle / Mighty Networks	Dedicated community platform	Another login, but robust features
Substack (future)	TBD	Watch for platform updates

Strategy tip: If your end goal is bringing Substack members into a program hosted elsewhere, consider housing community there so they start experiencing that ecosystem early.

⇒ *Where will I house my community?*

## Module 12: Pulling the Thread — Your Complete Offer Ecosystem

Think of people through their journey with you. When a stranger arrives on Substack, where do they go? What do they see first? What's the opportunity you give them?

### The Dream Client Journey

#### Substack = Marketing + Trust-Building Hub

Your Substack is the front end. It's where strangers find you, subscribe, consume your content, and build trust. Substack does the heavy lifting — it puts subscribe buttons everywhere, sends emails automatically, and creates assets for you.

#### Your Back-End = Higher-Ticket Sales + Delivery

Whether it's Kajabi, a private app, or another platform — this is where you deliver your premium programs and deeper transformation. Substack feeds this.

### The Offer Thread

- Stranger arrives → Free subscriber (email captured).
- Free subscriber → Paid tier member (trust built through value).
- Paid member → Founding tier / next-level offer (your hottest leads).
- Next-level → High-ticket program, 1:1, or mastermind.

Key: Substack's buttons auto-update at every tier. Once you add a founding member tier (your next-level offer), every paid member sees the "Upgrade" button automatically. Substack does the upsell for you.

## Making It Work

- Know the ONE next step you want people to take at each stage.
- Embed custom buttons in every article pointing to your CTA.
- Use custom pages for your paid tier landing page and a "Work With Me" page.
- Add links to your navigation menu strategically (membership, free resources, book, etc.).
- Let Substack automate the subscribe/upgrade messaging for you.

*Let this platform do the work for you. As long as you've got the paid tier set up, people will begin to buy when they're ready. Keep it simple: one note a day, one article per week. Start there.*

⇒ *My Dream Client Journey on Substack:*

Step 1 (Free): \_\_\_\_\_

Step 2 (Paid Tier): \_\_\_\_\_

Step 3 (Next Offer): \_\_\_\_\_

Step 4 (High-Ticket): \_\_\_\_\_

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## Module 13: The Weekly Content Creation System

This is the system that simplifies everything. It is built on the idea that you create once around a single topic each week and let Substack do the heavy lifting to distribute it across audio, video, written, and social.

*Adjust the order with what comes naturally to you. Which format flows easiest for you — speaking into a mic, going live with an audience, or writing? Start there, and the rest of the week feeds off of it.*

### The Three Content Formats

Each week revolves around one topic from your content pillars, delivered in three formats:

- Audio/Podcast — record a podcast episode on the topic.
- Live Video — go live on the same topic, going deeper and engaging with your audience.
- Written Article — use the transcript from your audio or video to create a polished article.

The order depends on what comes naturally to you. Some of you will flow best speaking into a mic. Others will come alive during a live video with a real audience. And some of you are strongest when you sit with a document and write. Whichever comes easiest, start there — the other formats build from the transcript.

## The Weekly Flow (Sample)

Day	What to Do + How Substack Helps
<b>Tuesday</b>	Record a podcast on a specific topic. Upload into Substack's podcast feature. It automatically posts as an article, emails your subscribers, and goes out to Apple/Spotify. Tag it with your content pillar. Grab the transcript.
<b>Wednesday</b>	Go live on the same topic (public). Promote the paid Friday session. Substack sends emails, creates calendar links, and auto-generates the replay. Schedule the live ahead of time so people can discover and add to calendar.
<b>Thursday</b>	Publish a written article using the transcript from Tuesday/Wednesday. Include a link to Tuesday's podcast for listeners. CTA: join the paid session on Friday. Substack emails your list and creates a note automatically.
<b>Friday</b>	Paid subscriber training or session. Email your main list (outside Substack) about what you're teaching. They need to be a paid subscriber to attend or get the replay. After the session, Substack generates video clips you can reuse.

## Why This Works

- Surround-sound marketing: your audience hears the topic across audio, video, and written formats throughout the week.
- Repetition builds trust: the same theme repeated across formats deepens the message.
- Continuous conversion cycle: every piece of content points to the paid Friday session, creating a weekly rhythm of converting free subscribers to paid.
- Not a heavy lift: you create one core piece of content and Substack distributes it everywhere else.
- Replaces other content strategies: this can be your only content strategy.

## Monthly Pillar Rotation

If you have 4 content pillars, rotate them by week: week one covers Pillar 1, week two covers Pillar 2, and so on. In one month, you've created solid content across all four pillars.

⇒ *My monthly pillar rotation:*

Week 1 topic: \_\_\_\_\_

Week 2 topic: \_\_\_\_\_

Week 3 topic: \_\_\_\_\_

Week 4 topic: \_\_\_\_\_

## Transcript Workflow

- TurboScribe is recommended for transcription — it keeps all your files organized and your team can use it too.
- You can also download transcripts directly from Substack's podcast feature.
- Use Claude to turn transcripts into polished articles (it's a much better writer for documents). Still massage it to make sure it's in your voice.
- For training recordings, upload all transcripts into a Claude project and ask it to create a step-by-step guide — it can produce a 20-page resource in 15 minutes.

## The Two Requirements

**1. Meaningful, valuable content** that is clear for your tribe. The more engaged you are with your audience and on Substack, the more ideas will flow.

**2. Discipline to do it.** But what this system does is create a continuous weekly cycle of serving your paid subscribers and converting more of your free subscribers into paid each week.

*Don't forget to restack your gold from all these posts. The best marketers are repetitive marketers. You can have a team member highlight quotes and restack 2–3 times per week.*

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## Module 14: The White Glove Subscriber Process

This is where the real magic happens. It's about ditching the set-it-and-forget-it automation mindset and getting back to human-to-human, belly-to-belly relationships. Your paid subscribers are your hottest people — they've already said yes to you. Why would you spend your time anywhere else?

*We have to earn a subscriber. Every single person who hits subscribe is saying 'yes, I want to hear from you.' Even if it's free, that's a big yes. Paid is an even bigger yes. We want to actually take the time to say thank you.*

## The Welcome Process

### Step 1: Direct Message Within 24–48 Hours

When someone becomes a paid subscriber (or a new free subscriber, if you choose), reach out personally through Substack's direct messages — not email. DMs are more personal, more visible, and they're where your subscriber already is.

### In your message:

- Welcome them to the paid tier (or your publication).
- Introduce yourself or your team member.
- Remind them what they just signed up for. (Many subscribers sign up off one post and won't remember your name or what they subscribed to.)
- Offer a strategic welcome gift.

### The Welcome Gift Strategy

Have a welcome gift that is only available through the DM. This serves two purposes:

- It rewards them for engaging in the direct messages and opens a two-way dialogue.
- It strategically introduces them to your deeper work — warming them up (or weeding them out) for your next-level offers.

The gift should help them get to know you and what you teach. Think: a short ebook, a free training, a resource guide, or an audio welcome message.

### Tip: Voice Messages in DMs

You can send voice messages through Substack DMs by recording on your phone, uploading to Google Drive (set to “anyone with link”), and dropping the link in the DM. You can create one welcome voice message and reuse the same link for everyone.

## Sample Script

*Here's a template you can adapt:*

*Welcome to [Your Membership Name]! I'm [Name] on [Your Name]'s team. We're so excited you're here. I want to make sure you have the page bookmarked with all our trainings and resources: [link]. Every recording and resource will go here. We also wanted to gift you [description of gift] if you're interested?*

Wait for their response. If they say yes:

*Great! Here's [gift description]. I'm dropping the link below. What is your goal on Substack?*

If they're not interested in the gift, that's valuable intel too — they've just told you they're likely not a fit for your deeper offers. Note it and move on.

## Step 2: Document in Your Virtual Rolodex

Create a simple Google Sheet to track every subscriber interaction. For each person, track:

- Date they subscribed
- Whether the initial welcome message was sent

- Whether they replied
- Whether the gift was sent
- What their goal on Substack is
- Any other notes from the conversation

### Step 3: Ongoing Outreach Cadence

After the initial welcome, reach out to each paid subscriber approximately every other week (twice a month). Be strategic about the outreach — deliver value, share a new resource, engage in conversation, and ultimately see if this person is right for your other offers.

### Setting Up the Thank You Email

Inside Substack Settings, update your thank-you email for new subscribers. Let them know:

- A team member will be reaching out within 24–48 hours.
- They have a special welcome gift waiting for them.
- Include a link to the team member's Substack profile so they can even DM first.

### Why This Works

- Your free subscribers are the top people who will become paid.
- Your paid subscribers are the top people who will be interested in your other offers.
- The feedback loop from conversations tells you exactly what content to create next.
- You'll never be at a loss for content ideas when you're actually talking to the people interested in your work.
- This creates stickiness, retention, and genuine relationships that lead to natural upsells.

*Think of it like a welcome wagon. When someone moves into the neighborhood, you bring them something. Do the same when someone subscribes. That's white glove service.*

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⇒ *My welcome gift idea:*

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⇒ *Who will own this process (me or a team member)?*

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⇒ *My welcome message script (draft):*

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## Module 15: New Substack Features + Platform Updates

Substack is rolling out new features constantly. Here are the latest updates and how to use them strategically.

### Scheduled Notes

You can now schedule Notes in advance — this is brand new. Previously, Notes had to be posted in real time. Now you can batch-create your Notes in one session and schedule them across the week.

### How to Use This

- Keep a running Google Doc of Note ideas as they come to you.
- Set aside one session per week to write and schedule Notes for the next 5–7 days.
- Have a team member restack your best existing content and schedule those restacks across the week.
- This is especially powerful for non-energy types who want to batch and preserve their energy.

### AI Read-Aloud for Articles

Substack now has a built-in AI voice that can read any article aloud. Readers simply hit the Play button at the top of any article and the full text is read to them. You don't have to embed anything — it's automatic.

### Strategic Implications

- More people will consume your content because not everyone wants to read long articles.
- You can remind readers that the listen option is available.
- Your own recorded voice still carries important frequency — consider still embedding your own audio or linking to your podcast for the personal touch.
- This means you can consume more Substacks yourself, which helps with reciprocity and engagement.

### Paid Content Placement Strategy

Place your paid content sections at the top of your publication page, right underneath your hero post. Here's why: anyone who visits your page — including non-subscribers — will see those

compelling paid content titles. When they click, Substack prompts them to upgrade. This is work-smarter-not-harder marketing.

### How to Set This Up

- In the Website Editor, move your paid content feature block above your free content pillar blocks.
- Give your paid content compelling, curiosity-driven titles that make people want to click.
- When a non-subscriber clicks on paid content, Substack handles the upgrade prompt for you.

### Every Post Is a Page

A powerful reminder: every article, podcast episode, and post on Substack is a standalone web page with its own URL. This means you can run ads directly to any individual post, pin posts on Pinterest for SEO, share specific articles as links in emails or on other platforms, and use individual post URLs as landing pages. This is critical for ad strategy — you can run ads to your main pinned hero post, to a specific compelling article, or to your /subscribe page.

### Pointing Your Custom Domain to Substack

You can point your personal domain (like yourdomain.com) directly to your Substack publication using Substack's custom domain feature. If you're driving all your traffic to Substack anyway, this simplifies everything — one URL, one destination. Your publication becomes your website.

### Email List Integration

Substack doesn't yet have native integrations (like Zapier) with other email platforms, but you can manually sync:

- Once a week, download your latest subscriber CSV from Substack.
- Upload to your main email platform (Kajabi, ConvertKit, etc.) and tag them so you can include or exclude them from other campaigns.
- When first starting, consider uploading your hottest leads and existing clients to Substack — not your entire list.

### Pinterest + Substack Strategy

Because every Substack article is a standalone blog-style page, it works perfectly with Pinterest. You can create pins that link directly to your Substack articles for organic discovery and SEO. Consider working with a Pinterest strategy team or using Simple Pin Media's approach to drive traffic back to your publication.

## Appendix: Master Checklists + Action Plans

### Publication Page Launch Checklist

#### Strategy + Foundations

- I know my primary call to action
- I know the URL for my CTA button
- I've written the button label text

#### Publication Page Setup

- I've created my pinned hero post
- I've set the hero display to "Media Feature"
- I've pinned the post to my homepage
- I've added at least one Subscribe Block
- I've written the 3 subscriber messages (non, free, paid)

#### Content Pillars + Tags

- I've defined my 4 tag names
- I've created a feature block for each pillar
- I've set each block to filter by tag
- I've added override display titles
- I've started tagging all new articles

#### CTA Flow + Restacking

- Every published article has a custom CTA button
- I've set up a weekly rhythm connecting content to my CTA
- I've identified 3+ articles to restack this week

#### Paid Tier Setup

- Stripe account connected
- Monthly + annual pricing set
- Benefits list written in settings
- Custom page created for my membership
- Custom page added to navigation menu
- About page updated with value proposition + testimonials
- At least one post has a paywall added
- /subscribe URL saved for marketing use

### Weekly Content System

- I've identified which format flows easiest for me (audio, live, or written)
- I've mapped my weekly content flow (which day for each format)
- I have a transcription tool set up (TurboScribe or Substack's built-in)
- I've planned my first month's pillar rotation
- I have a consistent weekly CTA leading to my paid tier or next step

### White Glove Subscriber Process

- I've created a welcome gift for new subscribers
- I've written my welcome DM script
- I've updated my thank-you email in Substack settings
- I've created a Virtual Rolodex spreadsheet to track interactions
- I've assigned someone to own this process (me or team member)
- I have an outreach cadence plan (every other week)

### My 30-Day Action Plan

#	Action Step	By When?	Done
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

⇒ *My Biggest Insight From This Guide:*

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***You are your soapbox.***

*This is your place to be seen, heard, and paid for your voice.  
Everything you build here is working together to bring the right people to you  
and guide them into the transformation you are here to offer.*

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*This is a living document — new trainings will be added each week.*