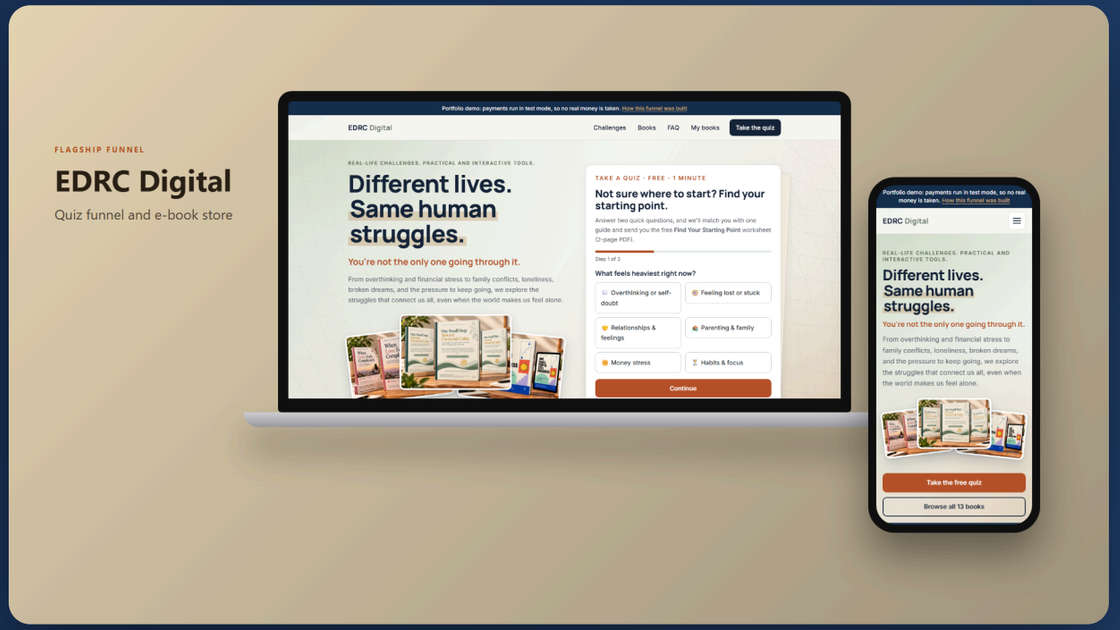
FUNNEL CASE STUDY

EDRC DIGITAL

A quiz-to-checkout funnel for ₱499 self-help e-books: lead capture, CRM stages, three email workflows and payments, tested end to end.

Ed Robert Azarcon Fuentes Funnel Designer



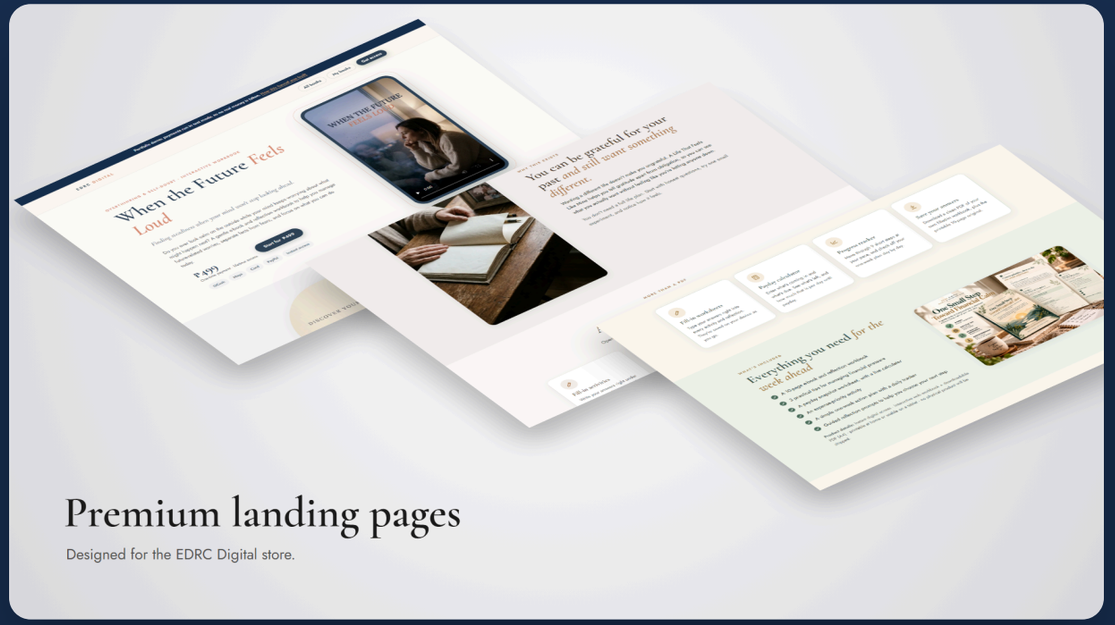
THE BRIEF

HELP EACH VISITOR FIND ONE BOOK, THEN FOLLOW UP WITHOUT SPAMMING.

EDRC Digital sells 13 short guides at ₱499, each with a printable PDF and an interactive online workbook.

Most visitors won't buy on their first visit. The funnel had to help each one find a single guide instead of browsing thirteen, keep in touch with people who aren't ready, and never email someone who already paid.

> Hosting and the CRM run on free plans. Email automation runs in GoHighLevel. Payments are in test mode so you can try it yourself.



THE FUNNEL

FIVE STEPS, ONE CLEAR PATH.

1

Quiz

Two questions: what feels heaviest right now, and which line sounds most like them. Matched with one of 13 books.

2

Free worksheet

Name and email in exchange for a 2-page worksheet. They become a Lead.

3

Buy now

Opens the matched book. Details are remembered, so there is no second form. They become an Opportunity.

4

Payment

PayMongo checkout with GCash, Maya or card, already filled in. The server confirms the payment.

5

Workbook

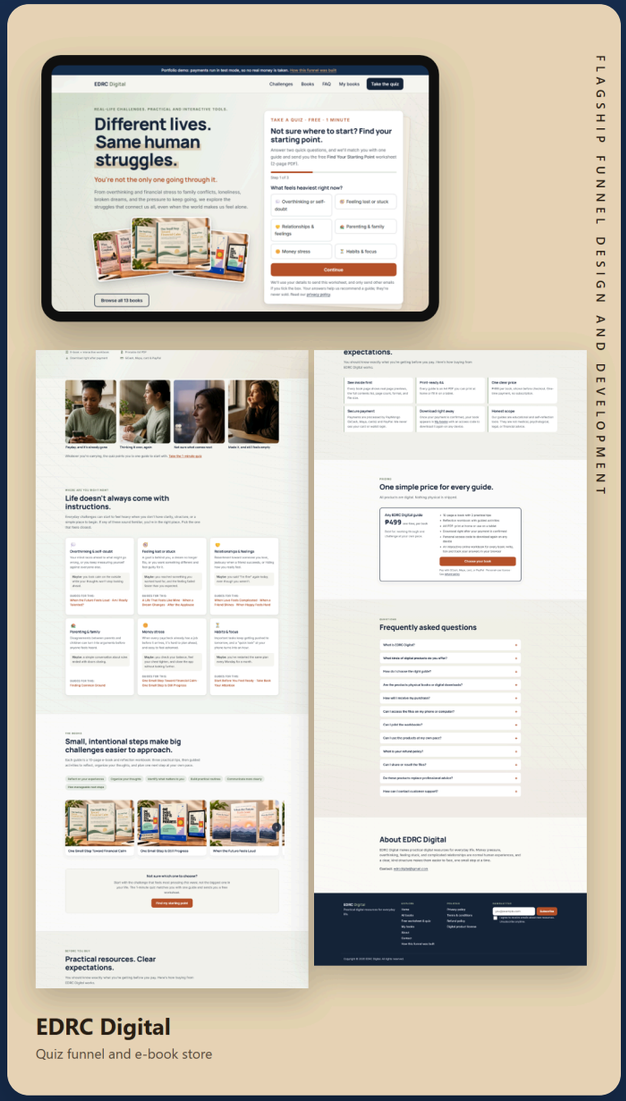
Lands in the interactive workbook with an access code for other devices. They become a Customer.

CAPTURE THE LEAD

THE QUIZ DOES THE CHOOSING, SO THE VISITOR DOESN'T HAVE TO.

It turns "which book should I buy?" into two easy questions and gives a free worksheet in return for an email. Even visitors who leave without buying become leads.

Quiz answers, the matched book and a link to it are saved on the contact, ready for the emails to use.



EDRC Digital

Quiz funnel and e-book store

FLAGSHIP FUNNEL DESIGN AND DEVELOPMENT

BEHIND THE SCENES

EVERY STEP UPDATES TWO TOOLS AT ONCE.

Lead took the quiz → **Opportunity** clicked Buy now, didn't pay → **Customer** paid

Stages only move forward, so a customer who retakes the quiz stays a customer.

HubSpot: the CRM

Each person gets a lifecycle stage. Every checkout becomes a deal in the "EDRC Book Sales" pipeline, moved to Paid after payment.

GoHighLevel: email

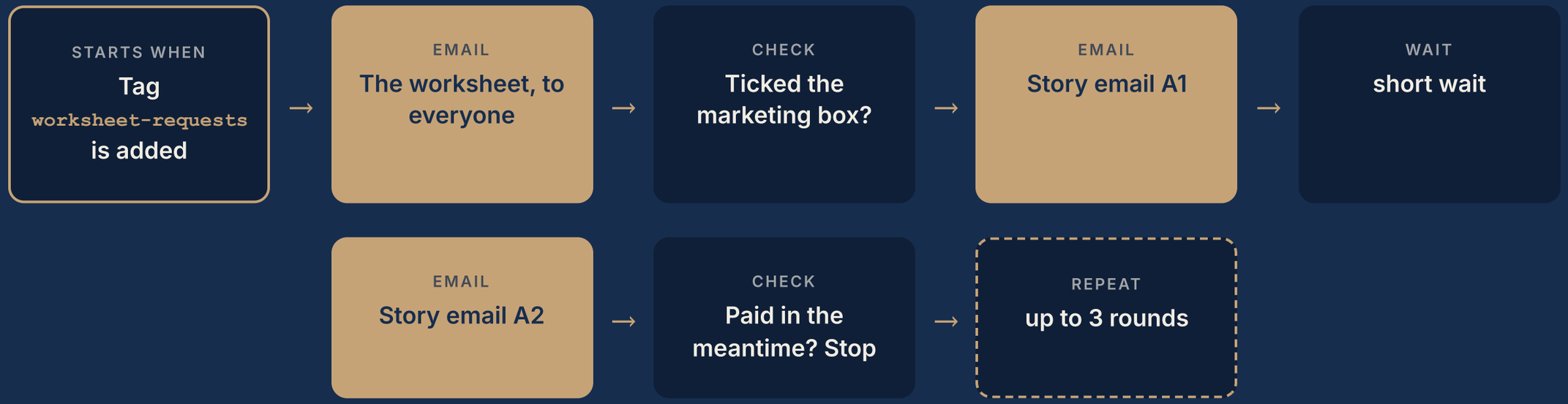
Contacts carry tags (`worksheet-requests`, `newsletter`, `checkout-started`, `customer`) and custom fields. Tags start the workflows.

Test or live

Every sign-up is labelled "QA test" or "Live", so test contacts never get mixed with real ones.

EMAIL AUTOMATION 1 OF 3

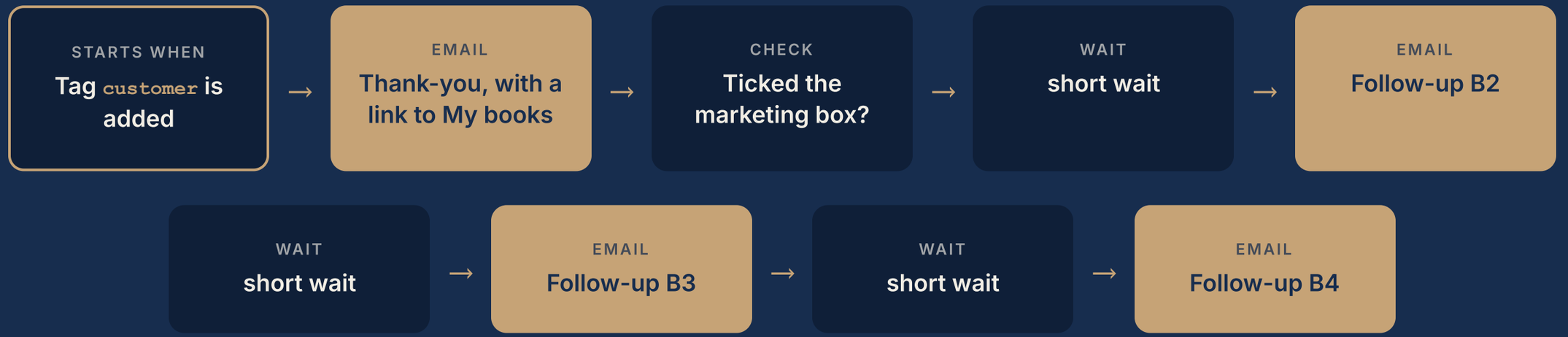
LEAD NURTURE



Everyone gets the worksheet. Only people who ticked the marketing box get the two story emails about their matched book. The sequence stops by itself the moment someone becomes a customer.

EMAIL AUTOMATION 2 OF 3

NEW CUSTOMER



Every buyer gets the thank-you. A few follow-ups about other books go only to buyers who ticked the box. The lead emails stop automatically.

EMAIL AUTOMATION 3 OF 3

ABANDONED CHECKOUT



Someone who filled in their details and clicked Buy now but didn't pay gets one email, and only if they haven't paid in the meantime.

WHO GETS WHICH EMAIL

RIGHT MESSAGE, RIGHT MOMENT.

STAGE	HOW SOMEONE GETS THERE	FOLLOW-UP
Lead	Took the quiz	Worksheet email right away. If they ticked the marketing box, two story emails about their matched book, repeated for up to three rounds.
Opportunity	Filled in details and clicked Buy now, but didn't pay	One recovery email naming the book they left behind, unless they've paid in the meantime.
Customer	Paid	A thank-you email with a link to My books. If they ticked the box, a few follow-ups about other books. The lead emails stop.

Only people who ticked the marketing box get the follow-ups, because that is what the form promises. Waits are set to minutes so the whole sequence can be tested in one sitting. A live version would use hours and days. Emails go out from a separate sending address with its DNS records verified.

WHAT I FIXED IN THE AUTOMATION

THE AI BUILDER DRAFTED IT. I REVIEWED EVERY STEP.

- **Wrong second trigger.** It added "customer tag added" to the lead workflow, which would have sent new buyers the lead emails. I removed it.
- **Reversed branch.** One If/Else sent buyers on and stopped everyone else. I flipped the condition so only non-customers continue.
- **Empty emails.** Several came out blank. I filled and checked every one before publishing.

A BUG IN THE EMAILS

The book link went nowhere.

Putting the book's address inside a link in the editor turned the curly brackets into %7B%7B. The full address is now saved in its own contact field, and the email's link is that one field and nothing else.

HOW I TESTED IT

12 YEARS IN QA, SO I TESTED LIKE A RELEASE.

Happy path first, then the back button, empty fields, repeat visitors, slow networks and failed payments. Issues found and fixed before calling it done:

- The quiz kept the last person's details after the Back button.
- "Skip the worksheet" reached checkout with every field empty.
- A second person on the same device could inherit the first person's checkout.
- Anyone with a PDF link could open a paid file without buying.

9
issues found and fixed before launch

1.6s → 0.6s
time to submit the quiz, after updating both tools at once

8 → 30
sign-ups per 10 minutes per address, because many Philippine mobile users share one

28
security points checked

SECURITY

BUILT SO A BUYER CAN'T FAKE A PAYMENT.

- Payments are confirmed by asking PayMongo directly from the server.
- Access codes are signed, so they can't be guessed or edited. Owning one book doesn't unlock another.
- API keys live only in Cloudflare's encrypted settings, never in the code or its history.
- Forms use rate limits, an origin check and Cloudflare's invisible bot check, and every input is checked on the server.
- No inline scripts: the browser refuses any script the site didn't ship.

CHECKED AGAINST

28 points from two security checklists, before going live.

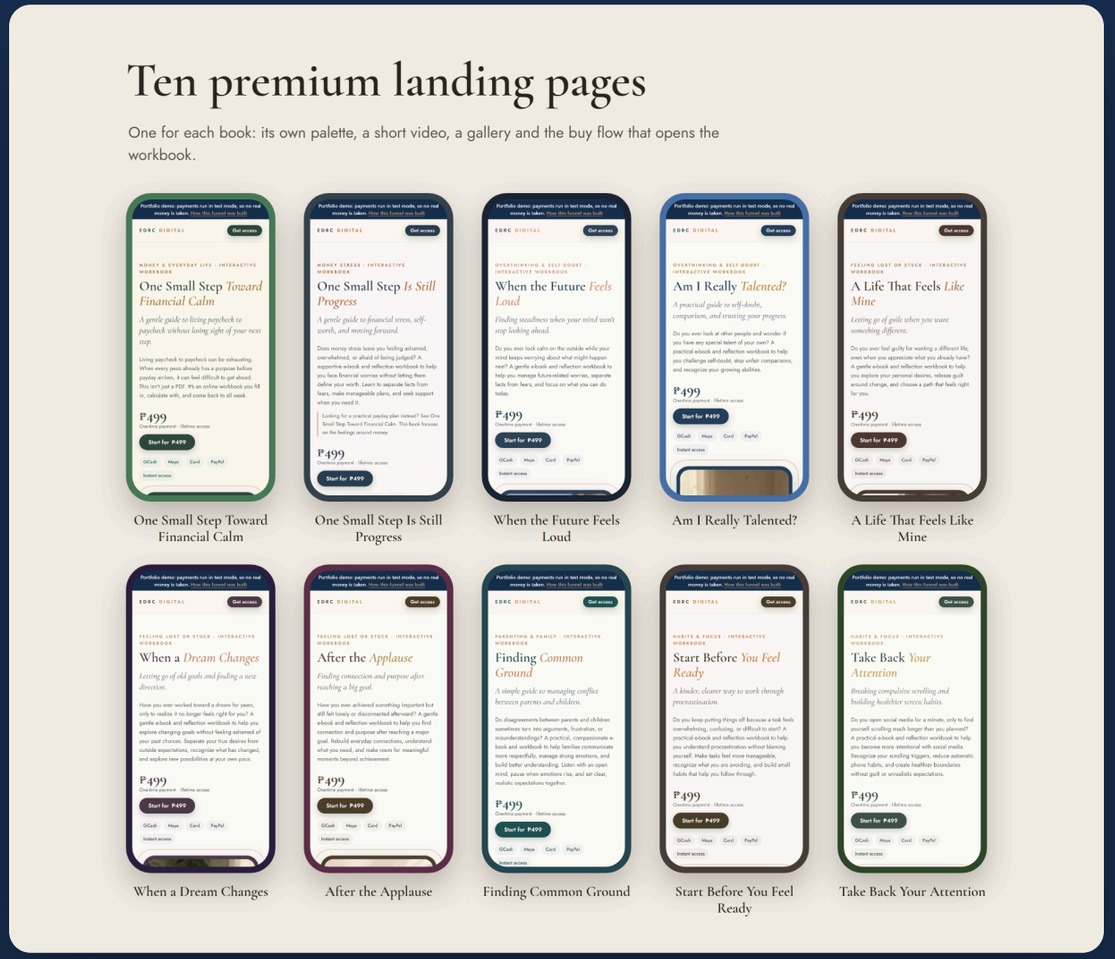
The owner's own browser still held a paid-book cookie from an earlier test, which once looked like "the workbook opens without paying". The code review found no hole, and clearing that cookie confirmed it.

EVERY BOOK HAS ITS OWN PAGE

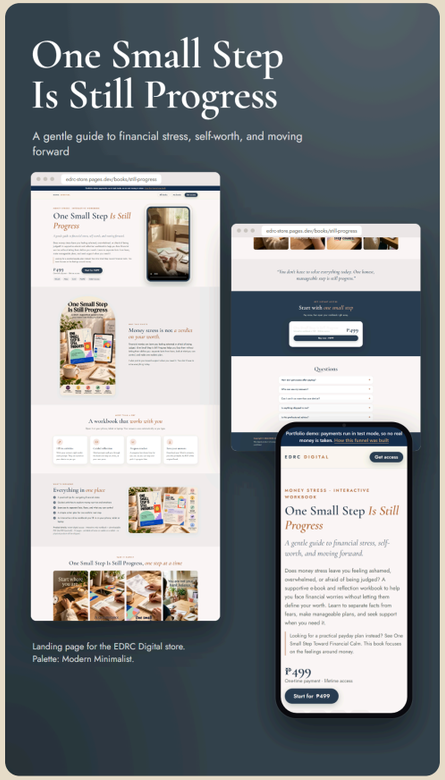
THIRTEEN GUIDES, EACH WITH ITS OWN LOOK.

Nine books have a long page with a video, what's included and a photo gallery. Each page has its own colours, built from one template so they stay consistent.

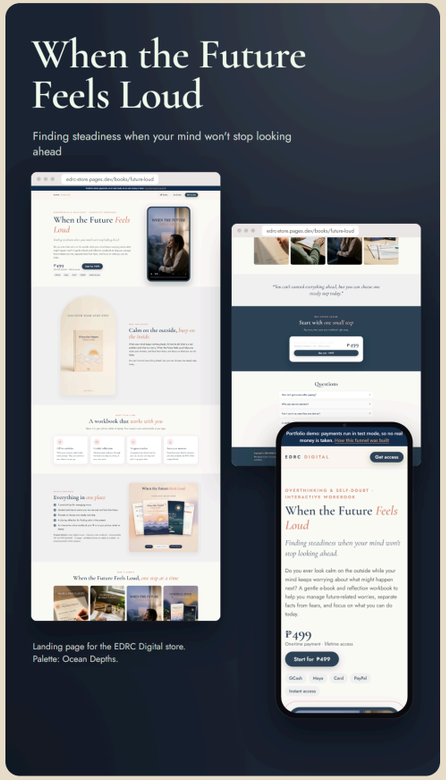
The funnel and workbooks work the same on a laptop, a tablet and a phone.



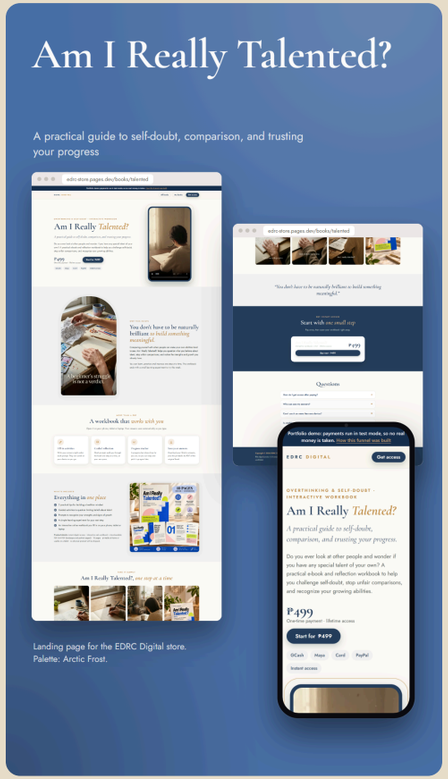
BOOK PAGES, ON A PHONE



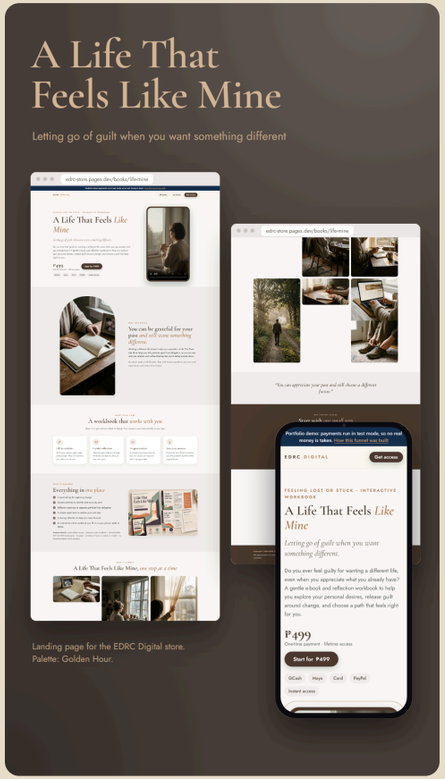
Landing page for the EDRC Digital store.
Palette: Modern Minimalist.



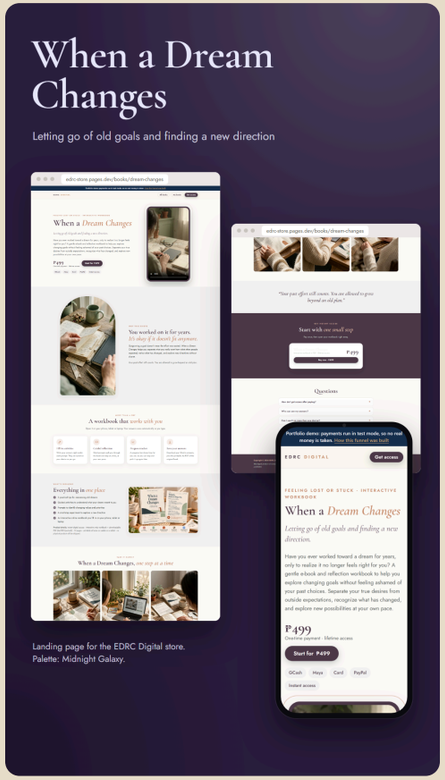
Landing page for the EDRC Digital store.
Palette: Ocean Depths.



Landing page for the EDRC Digital store.
Palette: Arctic Frost.

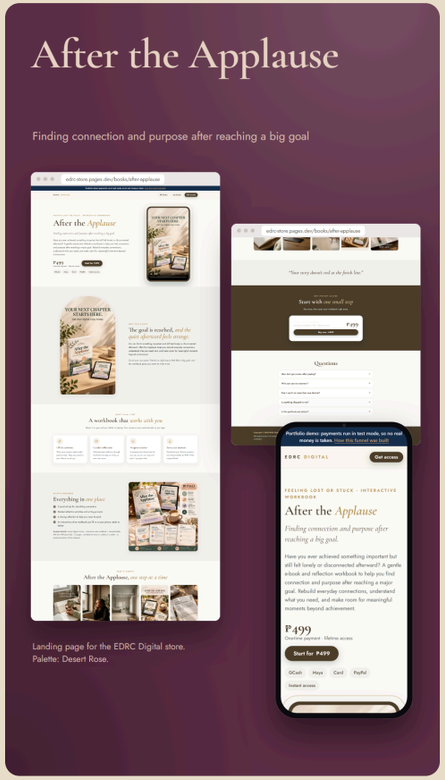


Landing page for the EDRC Digital store.
Palette: Golden Hour.

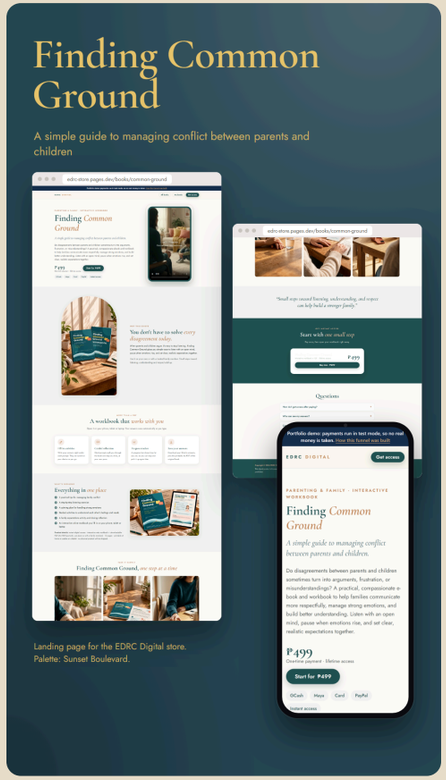


Landing page for the EDRC Digital store.
Palette: Midnight Galaxy.

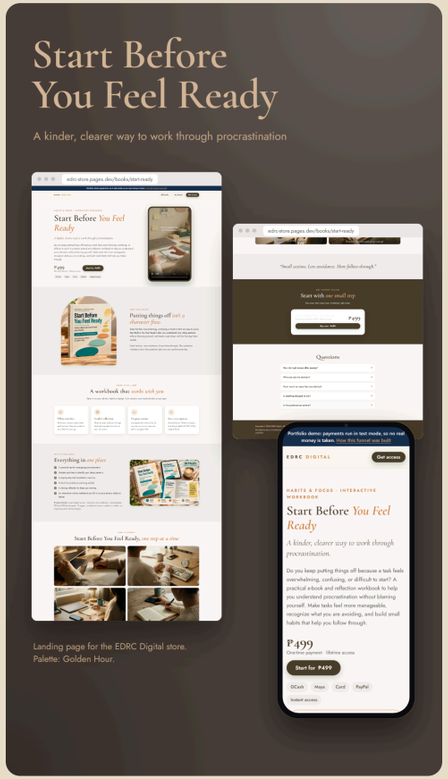
BOOK PAGES, ON A PHONE



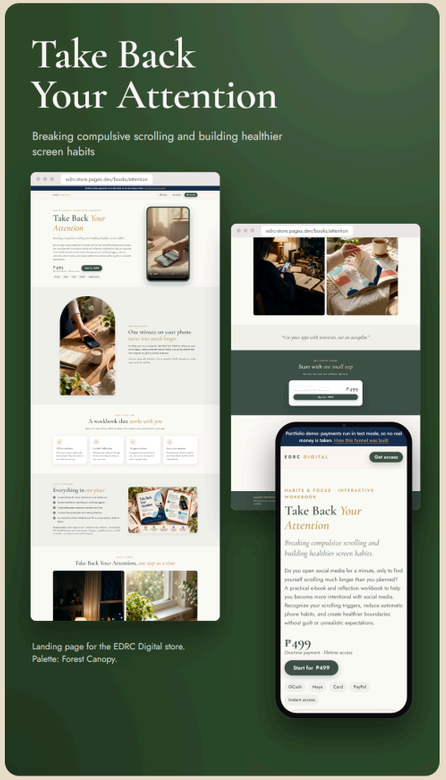
Landing page for the EDRC Digital store.
Palette: Desert Rose.



Landing page for the EDRC Digital store.
Palette: Sunset Boulevard.



Landing page for the EDRC Digital store.
Palette: Golden Hour.



Landing page for the EDRC Digital store.
Palette: Forest Canopy.

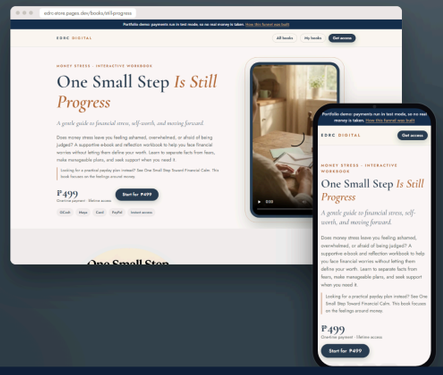


Landing page for the EDRC Digital store.
Palette: Botanical Garden.

BOOK PAGES, ON A LAPTOP

One Small Step Is Still Progress

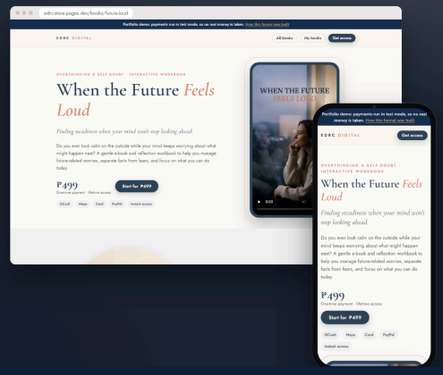
A gentle guide to financial stress, self-worth, and moving forward



Palette: Modern Minimalist.

When the Future Feels Loud

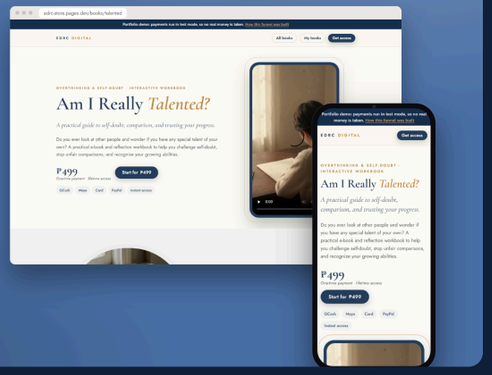
Finding steadiness when your mind won't stop looking ahead



Palette: Ocean Depths.

Am I Really Talented?

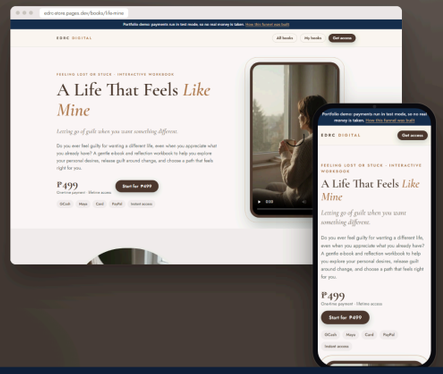
A practical guide to self-doubt, comparison, and trusting your progress



Palette: Arctic Frost.

A Life That Feels Like Mine

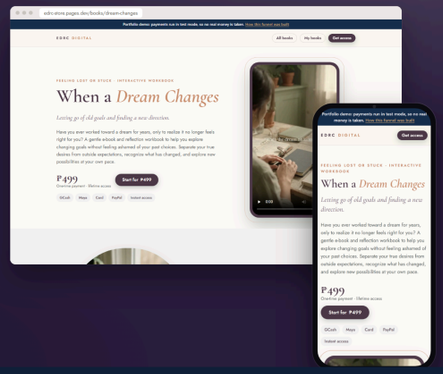
Letting go of guilt when you want something different



Palette: Golden Hour.

When a Dream Changes

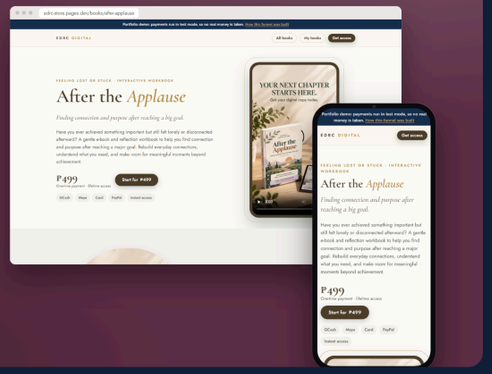
Letting go of old goals and finding a new direction



Palette: Midnight Galaxy.

After the Applause

Finding connection and purpose after reaching a big goal



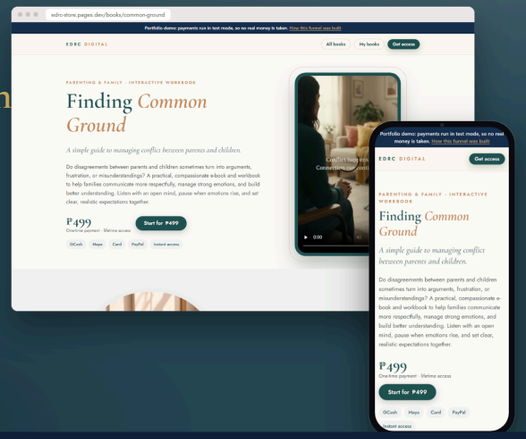
Palette: Desert Rose.

BOOK PAGES, ON A LAPTOP

Finding Common Ground

A simple guide to managing conflict between parents and children

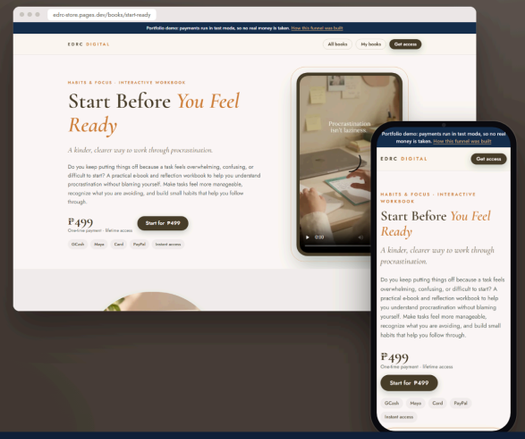
Palette: Sunset Boulevard.



Start Before You Feel Ready

A kinder, clearer way to work through procrastination

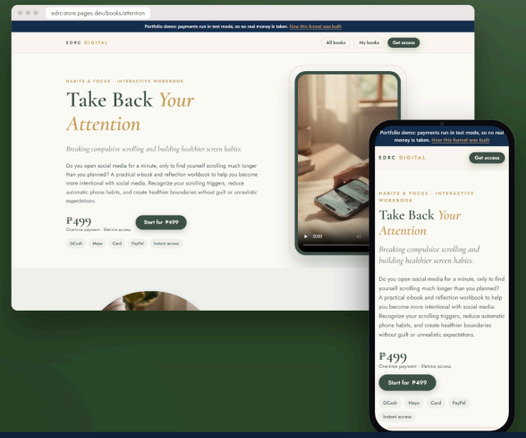
Palette: Golden Hour.



Take Back Your Attention

Breaking compulsive scrolling and building healthier screen habits

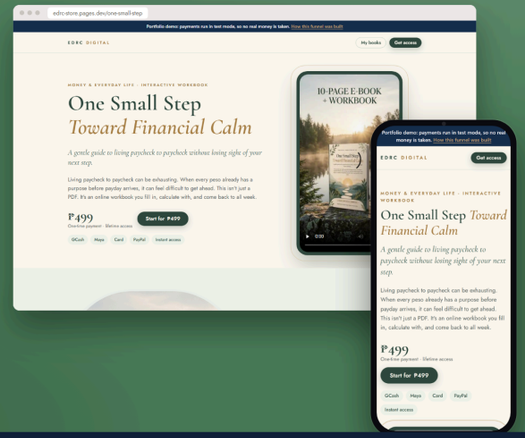
Palette: Forest Canopy.



One Small Step Toward Financial Calm

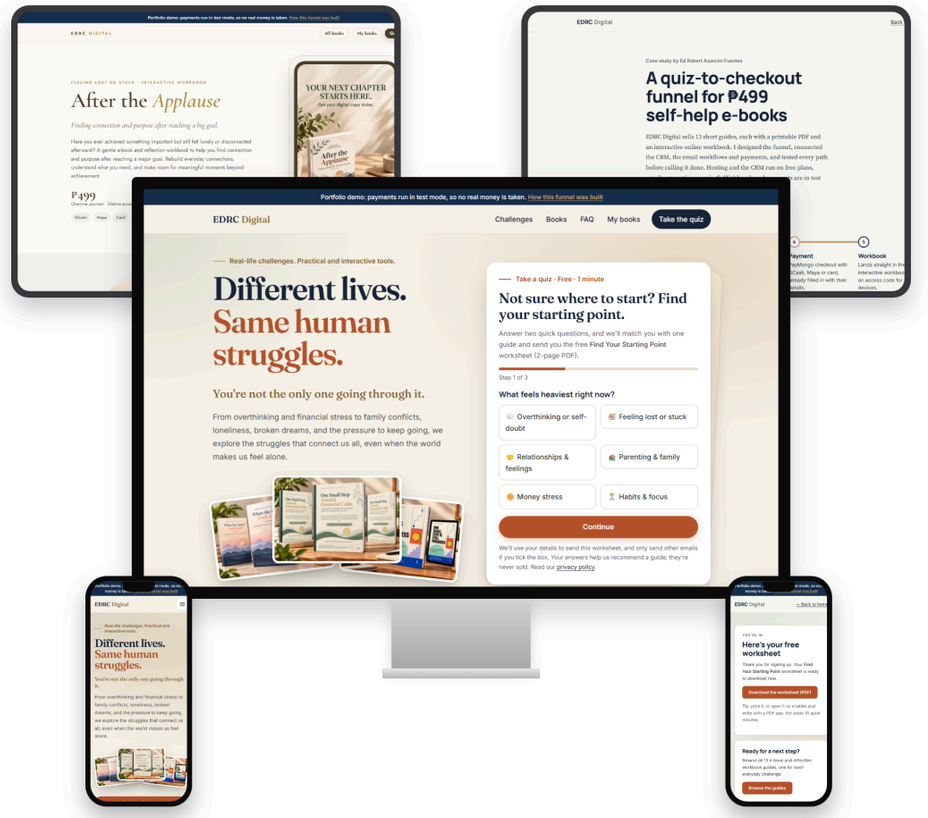
A gentle guide to living paycheck to paycheck without losing sight of your next step

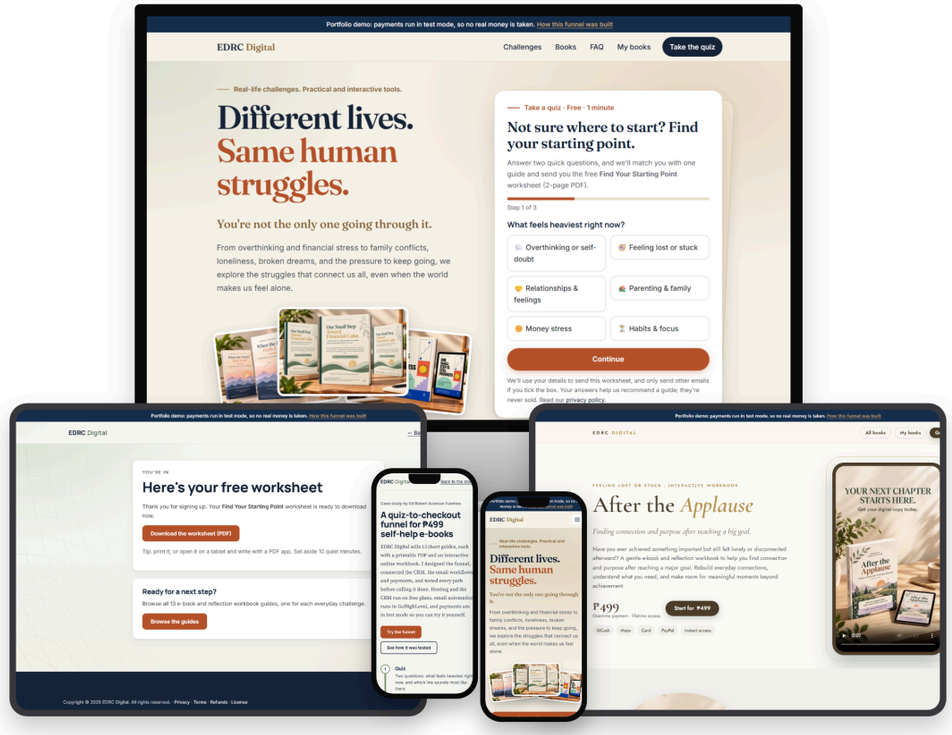
Palette: Botanical Garden.



EVERY SCREEN

LAPTOP, TABLET AND PHONE FEEL THE SAME.





WHERE IT STANDS

WORKING END TO END, HONEST ABOUT WHAT'S LEFT.

Done: the quiz, the lead and checkout forms, HubSpot and GoHighLevel updating together, the three email workflows, a GCash test payment all the way to the workbook, and the security pass.

Still to do: Maya, card and failed-payment tests, PayPal sandbox, and switching the email waits from minutes to hours and days for the live version.

> Stack: Cloudflare Pages, HubSpot, GoHighLevel, PayMongo. Plain HTML, CSS and JavaScript, no framework. GoHighLevel is the one paid tool.



LET'S WORK TOGETHER

THANK YOU

Thanks for looking through this case study. I design funnels and test every path before launch. Email edrcdigital@gmail.com or try the live funnel at edrc-store.pages.dev