DM AUTOMATION FOR COACHES: FROM FREE GUIDE TO BOOKED CALL

Give your lead magnet the moment someone asks, follow up with a short sequence, book discovery calls in the chat and sell your program with a Buy button.

Updated October 17, 2026 · chatinflow.com/solutions/for-coaches

People rarely buy a coaching program from a cold post. They take something free, try it, and then want to talk to you. Most coaches lose them somewhere in between: the guide goes out by hand days later, the follow-up never happens, and the discovery call link gets buried in a thread. ChatinFlow runs that whole path inside the chat where the person first said yes: the lead magnet the moment they ask, a short series of useful messages, a call they can book in two taps, and the program they can pay for without leaving the conversation. This guide walks through the set-up, step by step, for a coach or course creator who sells from Instagram, WhatsApp, Messenger or Telegram.

Key points

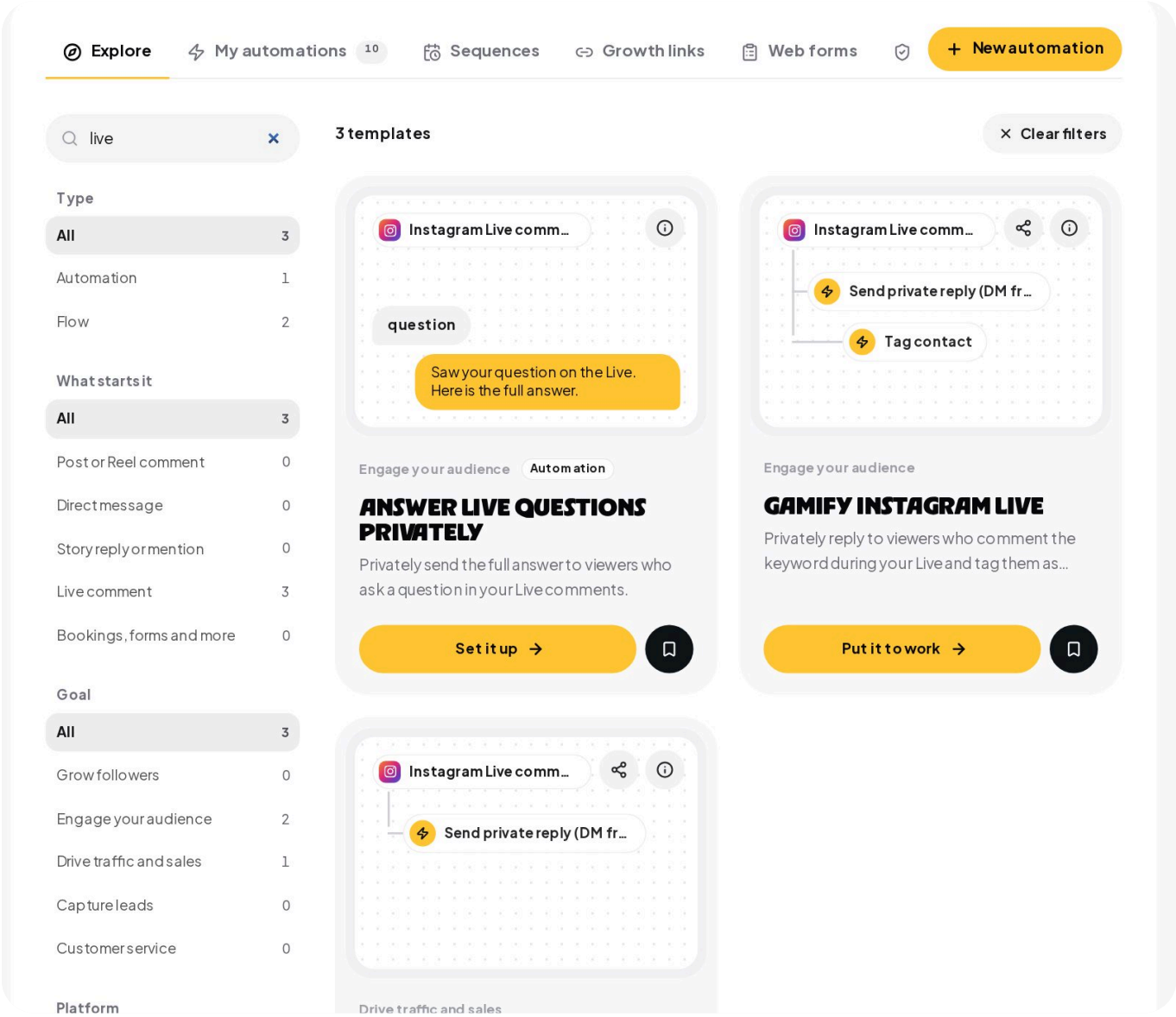
- Someone writes GUIDE or CALL under a post, in a story reply or in a DM and gets your lead magnet or booking link at once, with the email they type saved on the contact.
- A drip sequence follows up with one useful tip at a time, at the hours you set, and stops when the person replies.
- Discovery calls are booked in the chat from the times that are really free, with reminders before the call.
- A Buy button sells your program through your own Stripe or PayPal, or you share your checkout link from your course platform.
- Live questions get a private answer while you keep teaching, and students can invite friends with their own referral link.

THE COACHING FUNNEL, INSIDE THE CHAT

Step	What happens	Built with
A post, a story or an ad	Someone writes GUIDE	A comment, story reply or DM keyword trigger
The free guide	Arrives at once; the email is saved	Send DM, Ask a question, Reply check
The nurture	One tip a day for a few days	A drip sequence
The call	Free times offered and booked	Offer times in the chat, Book the time they picked
The program	Paid in the chat or on your platform	A Buy button or your checkout link
The students	Onboarded lesson by lesson, inviting friends	A sequence and Refer a friend

STEP 1: START FROM THE TEMPLATES

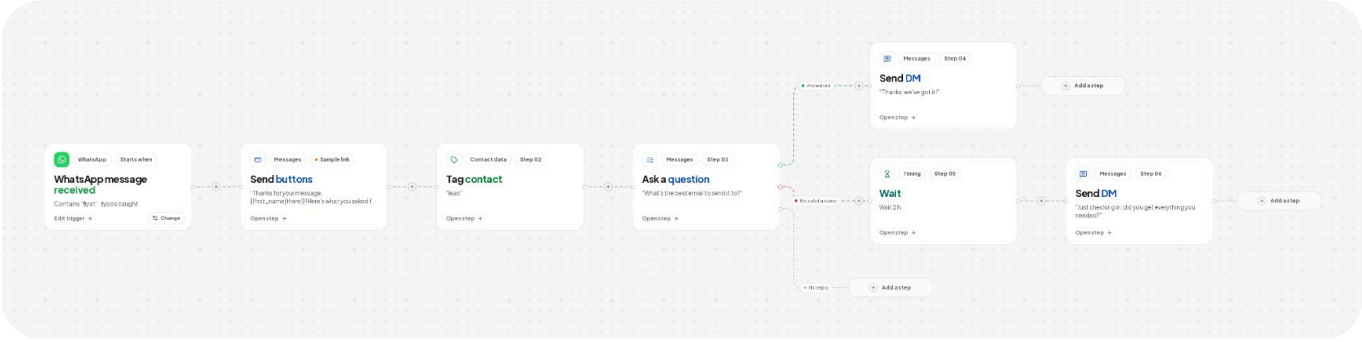
Open **Automations, Explore** and search the gallery. A search for "live" shows the Live templates: answering Live questions privately, gamifying a Live and sending offers during a Live. Searching "lead" shows lead capture from comments, stories and ads.



Live templates for coaches who teach on camera.

STEP 2: DELIVER THE LEAD MAGNET AND SAVE THE EMAIL

Someone sends GUIDE from your post, your bio or an ad. The guide arrives at once, anything you can link or attach, a PDF, a video or a page, and the email they type is saved on the contact for your email tool.



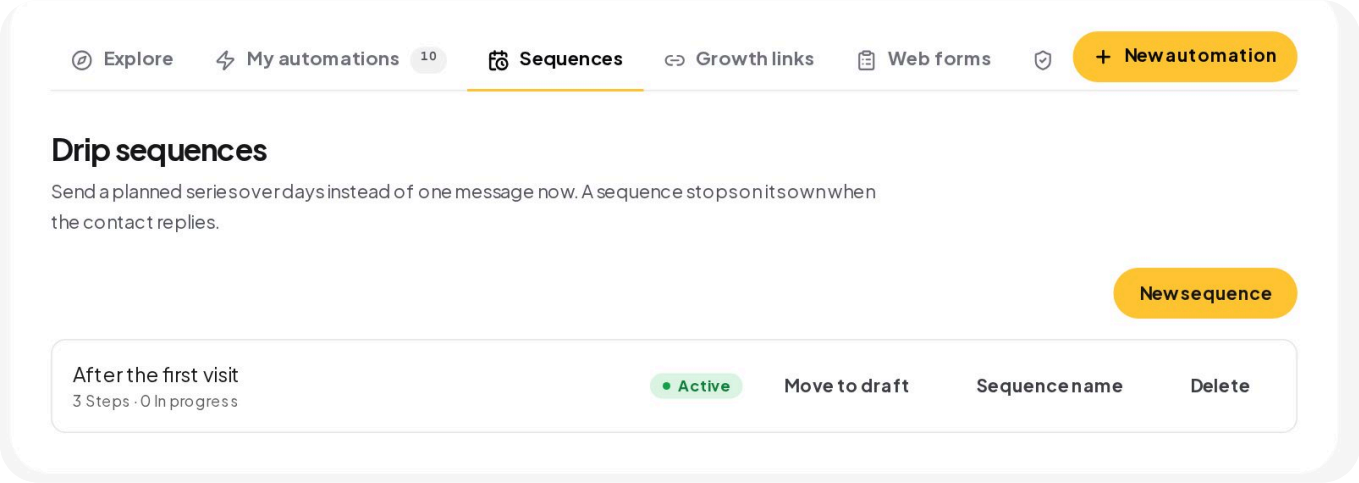
Ask for the email, check it, and follow up if no reply comes.

1. **The keyword.** GUIDE in the caption, in capitals, so people copy it.

2. **The question.** "Where should I send it?" with an Ask a question step.
3. **The check.** A Reply check step confirms that the answer is an email address; if not, a polite second try.
4. **The guide.** The link or file, plus a tag for the topic, so later messages match what they asked for.
5. **The handoff.** The Add to CRM or email list step sends the lead to Kit, Mailchimp, ActiveCampaign or HubSpot, or a webhook sends it anywhere else.

STEP 3: FOLLOW UP WITH A SHORT SEQUENCE

The person who downloaded your guide is warmest in the next few days. A drip sequence follows up with one useful tip at a time, at the hours you set.

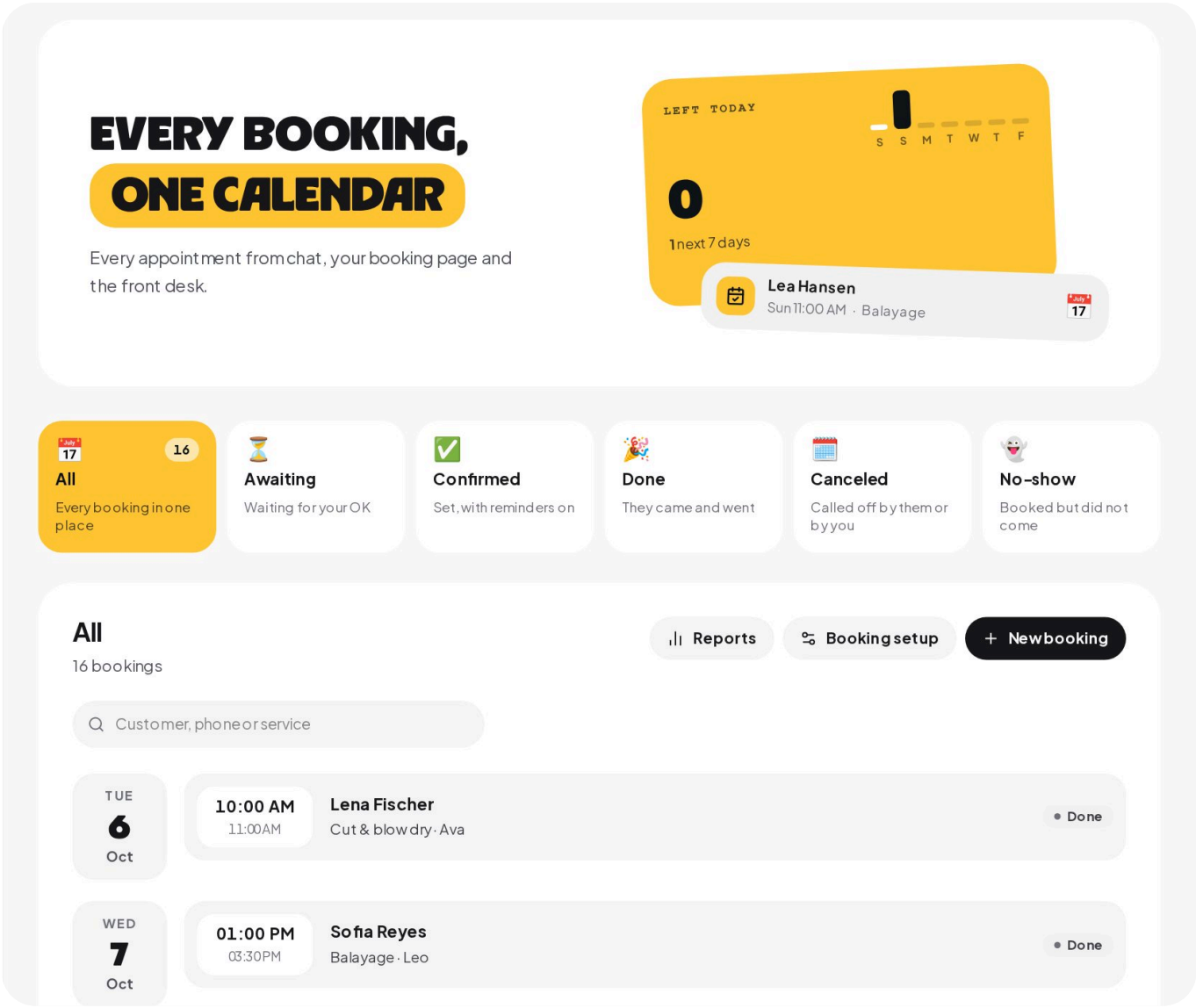


A planned series over days that stops on its own when the contact replies. Demo workspace.

A sequence stops on its own when the contact replies, so a prospect who asks a question gets you, not the next scheduled tip. Add people with the **Add to sequence** step at the end of the lead magnet flow. On Instagram and Messenger, messages can go out only within 24 hours of the person's last message, so end each tip with an easy question; their answer keeps the conversation open. On Telegram there is no window once they start your bot, and on WhatsApp approved templates carry the sequence past 24 hours.

STEP 4: BOOK THE DISCOVERY CALL IN THE CHAT

When they are warm, offer a free intro call they can book right in the chat. Set the times you take calls in **Bookings**; the chat only ever offers times that are free.



Calls booked from the chat land on the same calendar. Demo workspace.

Before offering times, two or three quick replies can qualify the call: their goal, their timeline, their budget range. The answers are saved on the contact, so you walk into the call knowing who you are talking to, and you can send the booking link only to the people who fit.

STEP 5: SELL THE PROGRAM

Two ways to take the payment:

- **A Buy button in the chat.** Connect your own Stripe or PayPal account, and the Buy button step opens a checkout at your price. The money goes straight to your account, the thank-you arrives in the chat and the sale is recorded.
- **Your course platform's checkout.** Share your Kajabi, Teachable or ThriveCart checkout link in the DM. There is no built-in sync with those platforms; an HTTP request step can record the lead in them through their APIs.

STEP 6: ONBOARD STUDENTS ONE LESSON AT A TIME

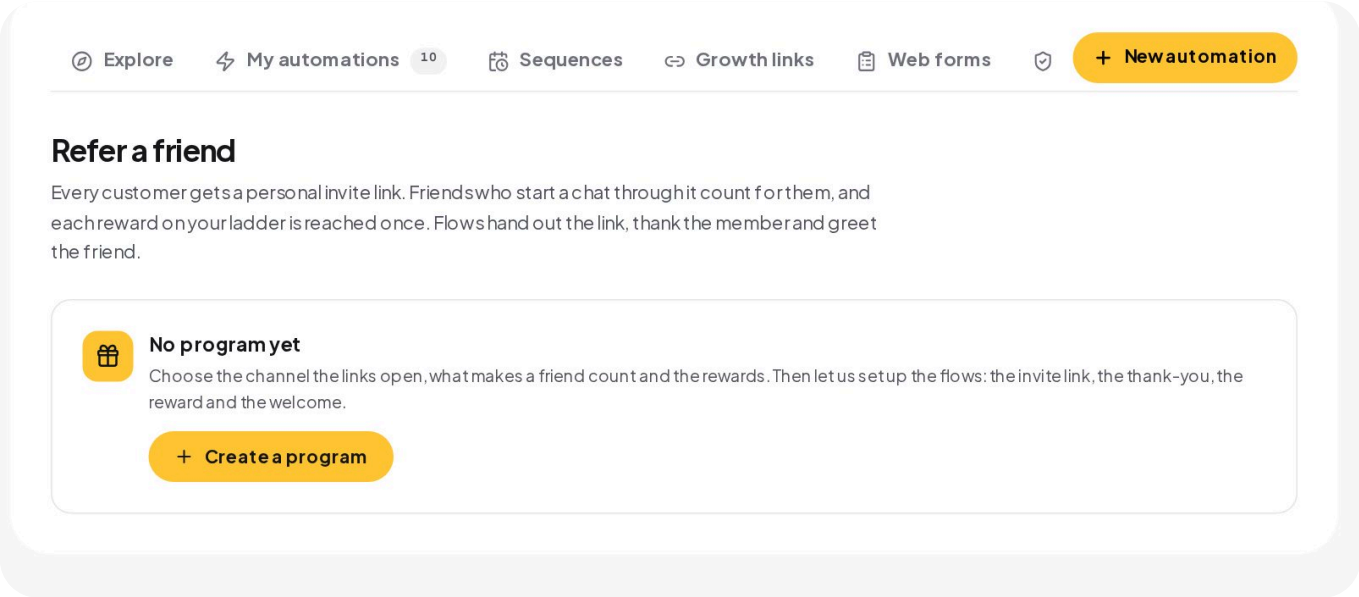
The first lesson can go out the moment someone asks, with no sign-up page in between. Finish it and the next one unlocks tomorrow morning, on schedule, with a sequence. For webinars, someone taps to register from your ad or post, the chat asks for an email and a phone number, saves both and sends the joining details right away.

STEP 7: ANSWER LIVE QUESTIONS WHILE YOU TEACH

Questions asked during a Live get a private answer while you keep teaching: a viewer writes PLAN and the plan you are talking about arrives in their DMs. A tag marks everyone who joined, so the replay and your next offer reach the right people.

STEP 8: LET STUDENTS BRING THEIR FRIENDS

Ask about a deal and get a personal invite link. With **Refer a friend**, each student gets their own link, friends who start a chat through it count for them, and each reward on your ladder is reached once.



Every student gets a personal invite link, and rewards arrive as friends join.

MEASURING WHAT CONVERTS

The Automations tab in Analytics shows which flows ran most and how many finished, and each flow's Activity view lists every run. Put a different keyword on each lead magnet, GUIDE, PLAN, CHECKLIST, and compare their runs to see which one people actually want. In the Results tab, sales from Buy buttons are credited to the last message before them, so you can see which lead magnet led to paying students.

AI THAT SOUNDS LIKE YOU

On a paid plan, with your own OpenAI, Anthropic, Google Gemini or Azure OpenAI key, an AI reply step answers in the voice you describe: the tone, what to say and what to avoid. The AI agent can answer program questions from your sources, such as your program page and FAQ, and hand the chat to you when the answer is not there. It does not learn from your past messages, and you can test real answers with Try it under AI Replies before anything goes live.

A SEVEN-DAY LAUNCH, INSIDE THE CHAT

A small program launch fits neatly into a week of automations.

1. **Day 1.** Post a Reel with "Comment PLAN for my free 3-day plan". The comment automation sends the plan and asks for the email.
2. **Day 2.** The sequence sends day two of the plan at 8:00, with a short question at the end.
3. **Day 3.** Day three arrives, with an invitation to a free Live on Thursday.
4. **Day 4.** Go live. Viewers who comment JOIN get the program page in their DMs while you teach.
5. **Day 5.** A broadcast to everyone tagged with the plan opens the doors, with a Buy button and a booking link for questions.
6. **Day 6.** People who tapped but did not buy get one reminder; people who booked a call get a reminder before it.
7. **Day 7.** Doors close. Students get lesson one and their personal invite link.

Every step uses the same flows, tags and contacts, so you can see afterwards which post, which Live and which message brought each student, and run the next launch with what worked.

WRITING MESSAGES THAT FEEL LIKE COACHING

Your DMs are a sample of what working with you feels like.

- **Give before you ask.** The guide first, the question second, the offer last.
- **One idea per message.** A tip someone can use today beats a long essay.
- **Ask, then listen.** A question such as "What is the hardest part for you right now?" tells you what to offer, and the answer saved on the contact makes the call better.
- **Make the next step obvious.** One button, one link, one thing to do, so nobody has to wonder what you want from them.

RIGHT FOR YOUR PROGRAMS?

It suits coaches who start with a free guide, lesson or call, course creators who launch from Instagram, WhatsApp or Messenger, and anyone who loses warm leads between the freebie and the sale. It does not

host your course; your lessons stay where you host them today. And it is not for cold outreach to people who never wrote to you.

TERMS IN THIS GUIDE

- **Lead magnet.** A free guide, lesson or checklist you give in exchange for a DM or an email address.
- **Sequence.** A planned series of messages over days. It stops on its own when the contact replies, so a question reaches you instead of the next tip.
- **Tag.** A label on a contact, such as webinar-oct, used to build segments and to start or skip automations.
- **Custom field.** A named value saved on a contact, such as goal or email, filled by a question step or a flow.
- **Buy button.** A flow step that sells a product or a program through your own Stripe or PayPal account, with the money going straight to you.
- **24-hour window.** On Instagram, Messenger and WhatsApp, a business can send free-form messages only within 24 hours of the person's last message.
- **Segment.** A saved filter of contacts, such as everyone with your free guide who has not bought, kept up to date as contacts change.

COMMON MISTAKES

- **A guide behind a long form.** Ask for one thing, the email, and deliver at once.
- **A sequence that keeps selling after they reply.** Sequences stop on reply; let them, and answer personally.
- **Offering every time slot.** Qualify first with two quick replies, then offer the call.
- **One keyword for every lead magnet.** Use one per freebie, so you can compare them.
- **Forgetting the 24-hour window.** End nurture messages with a question, or use Telegram or WhatsApp templates.

QUICK ANSWERS

Can people book a discovery call without leaving Instagram?

Yes. The flow offers your free call times in the chat, books the one they tap and sends a reminder before the call.

Can I send a different guide from each post?

Yes. Give each post its own comment automation and keyword; a post-specific automation wins over one that watches every post.

What happens if a lead replies in the middle of a sequence?

The sequence stops for them, and the conversation waits in your inbox so you can answer personally.

Can new leads go to my email tool?

Yes. Kit, Mailchimp, ActiveCampaign and HubSpot connect with your own key, and the Add to CRM or email list step sends each new lead.

SOURCES

- **Messenger Platform and IG Messaging API policy**, Meta for Developers, on the 24-hour window.
- **Private Replies**, Meta for Developers, on answering comments by DM.

DO IT IN SECONDS, FREE

chatinflow.com/solutions/for-coaches