

SALES FUNNEL WORKBOOK

A Simple Guide to Setting Up your Sales Funnel

Presented by:



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A digital marketing agency that creates inbound marketing platforms for digital entrepreneurs, public speakers, authors, and small businesses.

Sales Funnel Workbook

A simple guide to setting up your sales funnel

This short workbook is designed to provide you with **one visual dashboard** to view all the different interlocking parts of your sales funnel.

Your sales funnel is a progression that guides people **from stranger to customer**. Every transition point will be identified on this page, and if you are missing one of these stages, use the following worksheets to help you develop the content for that stage of your sales funnel.

A sales funnel starts with a stranger. When someone first lands on your website, they could be coming from anywhere, and they could be any type of person. Keep in mind, we don't want just anyone in your sales funnel; we want a specific type of person, called a **Customer Avatar**.

(Develop your Customer Avatars here -> <https://stellarplatforms.com/customer-avatar/>)

Your sales funnel should help you qualify your leads, and naturally weed out people who don't fit the right profile. Design all of these stages with your Customer Avatar in mind, and you will develop a pipeline that gets you the right kinds of potential customers.

Your sales funnel has 10 steps. Put a checkmark next to every stage you have completed, and write the URL for the different pages of your sales funnel in this chart.

Stage	Done	URL
Landing Page		
Lead Magnet		
Opt-in Form		
Thank You Page		
Autoresponders		
Sales Page		
Checkout		
Delivery		
Check In		
Testimonials		

Use the following worksheets to develop the pieces that you still need.

1. Landing Page

This is the top of your sales funnel, where you can drive both cold and warm traffic, through online advertising, 'Click Here' buttons, email and forum signatures, and social media.

1. What is the easy-to-recite URL that will be the evergreen landing page for your Customer Avatars?

The simpler and clearer this is, the easier it will be to promote online and offline.

2. What is the headline of this page?

Your headline should directly address a pain point or urgent need that your Customer Avatar is facing.

3. What is the main CTA (Call-to-Action) of this page?

This is the ONE thing you want the viewer of this page to do.

4. Have you removed all other options (navigation bar, sidebar, footer, etc) so there is only ONE option for the user to take on this page?

- Yes
- No

5. Have you tested this page on multiple devices and browsers, to see how the page looks on computers other than your own? (If not, go to browsershots.org)

- Yes
- No

6. Where can you include a link to this page? What profiles and signatures?

7. Where can you promote this page? What communities, groups, or forums?

8. How else can you drive traffic to this page?

2. Lead Magnet

A Lead Magnet is a free piece of content that solves a problem that your Customer Avatar is facing. This can be a PDF download, an email series, a piece of software, or a video.

1. What's the problem that someone needs this Lead Magnet to solve?

2. What will happen if they do not solve this problem?

3. Why is this Lead Magnet a good solution for this problem?

4. Has a professional designer or copywriter given you feedback on this Lead Magnet?

Yes

No

5. Do the fonts, colors, and photos match your logo and website?

Yes

No

6. Is your contact information explicitly included in the Lead Magnet?

Yes

No

7. Does the Lead Magnet end with a CTA (Call-to-Action)?

Yes

No

8. Is your Lead Magnet easy for people to download or access?

Yes

No

9. Are you sure? Have you tested this process yourself?

Yes

No

10. Have you had a technically illiterate friend attempt to download or access this Lead Magnet while you watch?

Yes

No

3. Opt-In Form

Your Opt-In Form is the second most technically difficult part of your sales funnel. This form needs to easily and effortlessly transmit data between your website, your list, and your ESP.

1. What is your ESP (Email Service Provider)?

2. Is your form correctly integrated with your ESP?

Yes

No

3. Is the styling and formatting (how it looks) customized to your brand?

Yes

No

4. Is the form accompanied by a strong CTA (Call-to-Action)?

Yes

No

5. Does this form collect the First Name of your contact? (This allows you to personalize your emails to them, which helps with email deliverability and bypassing spam filters.)

Yes

No

6. Is this form embedded in your website, or in a pop-up?

Yes

No

7. Have you had a professional website designer give you feedback about this form?

Yes

No

8. Does your form require Double Opt-In?

Yes

No

9. Are new subscribers automatically provided with your Lead Magnet?

Yes

No

10. Can new subscribers access your Lead Magnet *without actually getting on your list*?

Yes

No

*** note - if you deliver your Lead Magnet with a page redirect and without a Double Opt-In requirement, you could be losing subscriptions to your list. Either require Double Opt-In, for email delivery of the Lead Magnet, or disable the Double Opt-In requirement, if the Lead Magnet is delivered on a page redirect after subscription.*

4. Thank You Page

This is where your Lead Magnet is delivered, if it's a download or a streaming video, or where you can introduce the next phase of content delivery, for an email course or software download.

The people who access this page are your Subscribers. They have progressed to a further stage of your sales funnel, so the way you communicate with them can be more personal, intimate, and even *conspiratorial*.

This page is your opportunity to set the expectations for how they will be treated. You can explicitly state how often you will contact them, what you will contact them about, and what you expect from them. (You should expect your subscribers to follow you on social media. Ask for it.)

1. What is the URL for this page?

2. Is this page password protected?

Yes

No

3. Is the link delivered to each new subscriber in a subscription confirmation message?

Yes

No

4. Does this page clearly provide the Lead Magnet for download or view?

Yes

No

5. Do you have links to all of your social profiles prominently placed on this page?

Yes

No

6. What additional CTAs or digital assets can you include on this page?

***note - Think big here. What would be best for someone who will eventually become your customer? How can you WOW them? How can you prepare them for working with you later?*

5. Autoresponder Sequence

Your Customer Avatar has received your Lead Magnet, and gotten good value from it. Now it is time to nurture your relationship, by providing further expertise and advice.

1. Write down the subject lines for 3-5 educational emails you can send. These emails should not be selling, but instead, provide educational value.

2. What pieces of existing content (blog posts, articles, old newsletters) can you repurpose into email autoresponders?

3. How often should you send these educational emails?

4. Do you currently have autoresponder capabilities with your email service provider?

- Yes
- No

5. If so, do people who go into your educational autoresponder sequence *also* get sent regular, overlapping email newsletters?

- Yes
- No

6. Sales Page

Your sales page is where you make your money. This should be the focus of your optimization, editing, and redesign. Once you have built the pathways to get here, A/B test this page regularly, get feedback from professionals, and always improve the conversion of this page.

1. What is the URL for your sales page?

2. What is the product or service you are selling?

3. What is the pain point that will be relieved for your customer?

4. What is the transformation that your customer will experience after using it?

If you can't describe these in one sentence, they are not tight enough yet.

5. Have you written at least 25 headlines to select the very best one?

- Yes
- No

6. Does your headline clearly describe both 'what is this' and 'what's in it for me'?

- Yes
- No

7. Is there a CTA (Call-to-Action) above the fold?

- Yes
- No

8. What are the top 3 elements that should be at the very top of your sales page?

9. Is there a visible money back guarantee?

- Yes
- No

10. Are there testimonials on the page from current or former customers?

- Yes
- No

7. Checkout

The checkout process is the most technically difficult part of your sales funnel. There are many services and platforms you can use to minimize this difficulty, but which one you need depends on your specific situation. ([Schedule a consultation](#) for advice.)

1. Is there a visually arresting button that says some variation of 'Buy Now'?
 Yes
 No
2. Do you have checkout buttons at both the bottom and top of the page?
 Yes
 No
3. Do you display credit card logos and security seals?
 Yes
 No
4. Is your price displayed prominently next to your 'Buy Now' buttons?
 Yes
 No
5. Does your price end in an odd number?
 Yes
 No
6. Can your user get interrupted by a pop-up in the checkout process?
 Yes
 No
7. Can you measure shopping cart abandonment?
 Yes
 No
8. Have you tested the checkout process yourself on a mobile phone?
 Yes
 No

8. Delivery

Once your customer has paid you, it's time for you to shine. Your delivery process can make the difference between a happy customer that sends you referrals, and an angry customer that asks for their money back. Getting the sale is a good start, but the Delivery stage is where your customer wants to feel that they made the right decision in buying from you.

1. What are the most important things a new client should receive from you after purchase?

2. How could you make this experience feel more personalized?

3. How can you request feedback from fresh customers?

4. How can you make it easy for your customers to share what you are selling?

5. Have you mapped out your entire on-boarding and delivery process?

- Yes
- No

6. Have you collected all the content and communications in this progression into one document for review?

- Yes
- No

7. Have you had a professional writer give you feedback on this progression?

- Yes
- No

***note - Your on-boarding and delivery process is where you validate your customer's decision to do business with you. Make this an exceptional experience.*

9. Check In

After purchase and delivery, or after the close of a project, you should schedule a regular check-in with each of your former clients. It is *much* easier to re-sell to an old client or to a referral from a former customer than it is to acquire a brand new customer. Work this into your process.

1. When is the right time to check in and make sure your new customer is satisfied with what they have bought from you?

2. How often should you contact a former client for a check-in?

3. What is the best method of contact? Automated, or manual? Email, phone call, or social media shout out?

4. What specific questions you will ask them?

5. In the event of a negative response, what will you do to save the relationship?

6. What aspects of your business should they be reminded about?

7. How can you smoothly ask for referrals?

***example - "One of the reasons we worked so well together is that you [had this problem] and I [offered this solution] and you [achieved these results]. Who else do you know that [faces this problem]? Do you know anybody that wants [these results]?"*

10. Testimonials

Collecting testimonials is a habit. It's not something that you do once, it's something you do *continually*. But it doesn't have to be hard. It can be automated and painless, if you set it up as a natural stage of your sales funnel.

1. When is a client happiest with you?

2. List three times in your typical customer process when you can ask for a testimonial.

3. How will you introduce this conversation?

4. Where do you store your testimonials after you have received them?

5. Where do you display your testimonials for prospective customers to review?

6. How else can you use your testimonials?

7. Do you contact former clients on the anniversaries of your working relationship?

- Yes
- No

8. Do you have a system in place for automatically reminding you to contact customers and ask for testimonials?

- Yes
- No

About Caelan Huntress

I help entrepreneurs make more money in less time by setting up smart marketing systems.

For the past ten years I've been an entrepreneur, as a website designer, sales funnel strategist, and marketing copywriter. I've worked with hundreds of entrepreneurs on their digital marketing, their business models, and their sales funnels. I run a digital marketing agency called Stellar Platforms, and I am an author, speaker, and virtual trainer, and I live with my wife and three children in New Zealand.



My **keynote topics** include marketing, sales, accessibility, and digital technology. In addition to my **training programs**, I offer 3-month **coaching packages**, as well as ongoing consulting packages for a select number of clients each year.

You can read my case studies at <https://stellarplatforms.com/case-studies/>, find my writing at <https://caelanhuntress.com/>, or follow me on social media at:

- <https://www.twitter.com/caelanhuntress>
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- <http://instagram.com/caelanhuntress>
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- <https://caelanhuntress.tumblr.com/>
- <https://medium.com/@caelanhuntress>

(all these links were found conveniently at <https://about.me/caelanhuntress>)

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