



SALES FUNNEL CHECKLIST

Philosophically, we believe that it is marketing's role to provide a holistic view of the customer. During discovery, we identify the needs of prospects and customers so that we can find "sales ready leads." Once identified, it is the sales team's responsibility to negotiate and close the deal.

A logical first step is to create a SALES FUNNEL. In our experience, sales and marketing functions that are synergistic and tightly integrated provide greater visibility, transparency, and accountability within the sales and marketing process to ensure a win-win proposition for all business stakeholders. Use this checklist to help identify and complete the essential tasks to develop a profitable sales funnel.

1. Make a list of all products and services, including price points and promotional price points, and create a system to organize. Use:

- Spreadsheets
- Mind map
- Flowchart

2. Identify the problem solved, target audience, and benefit each product or service provides.

3. Create a content plan that is used to drive traffic and enter prospects into the sales funnel. It includes:

- Social media and blog posts
- Guest blog posts
- Free reports/case studies
- Videos
- Interviews

4. Create an opt-in offer and squeeze page to build email list. Opt-in offer is a:

- Market research or trends analysis
- Newsletter
- Video series or webinar
- Tutorial
- eBook

5. Create automated email messages that follow up with new subscribers, a thank you page and follow up messages to transition to the first product in sales funnel.

- Establish a timeline that takes into consideration the most effective time to deliver each message.
 - Identify the format, goal, and call-to-action for each message.
6. Create and schedule email messages using chosen auto-responder technology.
7. Look at products and services list and identify opportunities to:
- Upsell – Can you offer the next higher priced product to customers during your sales and marketing process?
 - Cross-sell – Can you offer complementary or supplementary products to your customers within the body of your sales funnel?
 - Create special promotions – Can you introduce special promotions to your customers to help move them through your funnel?
8. Create sales page for each offer. Include:
- Attention grabbing headline
 - Compelling benefit-driven copy
 - Proof
 - Motivation to act now, for example, a limited number or a limited time offer
 - Call-to-action
9. Test all elements of the sales funnel process including email links, sales page links, and how each element appears on various browsers. Make sure shopping cart system is integrated into the sales material and emails are working perfectly.
10. Implement a system of analytics and evaluation. Create systems to collect data about:
- Email message click through rates
 - Links and call-to-actions on sales pages
 - Email open rate
 - Squeeze page conversions
 - Sales and profits for each customer and offer
 - Schedule a time each week/month/quarter to review the analytics and make any necessary tweaks or changes to existing sales funnel.