



Job aid

**Effective funnels:
How to turn leads
into sales**

Effective funnels: How to turn leads into sales plan of action

Use this plan of action as a living document to devise a sales funnel strategy that supports your business goals. The more complete your plan is, the more responsive your audience will be to your marketing efforts.

Your objective

Fill in your one-sentence objective on how you'd like to use a sales funnel to better support your target customers on their buying journey.

Get to know your target audience

Let your audience know why they should do business with you.

What is your unique value proposition?

Understand where else your audience shops.

What differentiates you from your competitors?

What kinds of problems can you solve for your users?
What kind of interests can you help satisfy?

Determine who your target audience is.

Who can benefit the most or enjoy what you have to offer?

What kinds of subsets can you identify within your larger audience?

Research your target audience.

Where can you find your target audience online? What social channels and forums do they frequent? What influencers do they follow?

“Listen” to your customers by reading or watching comments and reviews, or by engaging with them directly. Based on their behavior, what can you conclude about what they are seeing, feeling, experiencing?

What are they saying about your offerings or your competitors' offerings? What problems do they have that you could solve for?

Determine what type of sales funnel to create

Types of funnels	How it works	How might it align with the product or service you're marketing?	How might it fit your target audience's needs or interests?
Lead generation	<ul style="list-style-type: none"> • The most widely-used funnel • Start with a lead magnet (eg., exclusive discount) that's given when the user signs up for your mailing list • Follow up with an automatic welcome email and build the relationship from there 		
Free consultation	<ul style="list-style-type: none"> • Great if your business offers services instead of products • Offer a free consultation that gives you the opportunity to start a relationship • After the consultation, maintain contact to ask their thoughts, answer questions, and share how you can offer additional value 		
Cross-sell	<ul style="list-style-type: none"> • For when your customer is already making a purchase • Suggest a related item that will enhance the first and increase the cart total • Example: A customer buying a pizza might want to add on breadsticks or dessert 		

Types of funnels	How it works	How might it align with the product or service you're marketing?	How might it fit your target audience's needs or interests?
Product launch	<ul style="list-style-type: none"> • Generate excitement for a new offering prior to launch • Have users join an email list to be the first to purchase or first to know about any updates • Send out teaser emails or host giveaways to heighten the anticipation and desirability 		
Upsell	<ul style="list-style-type: none"> • Use a lead magnet offering a product or service for an incredible price, then "upsell" by showing the customer another, more premium version that they can get for a small price increase • Once the customer is commits to buying the more premium item, offer them a superior version with all the best features that they can get if they spend a bit more 		

Select which type of funnel fits your offering the best:

Map out your sales funnel

Create awareness

How can you put your business on your target audience's radar?

How can you show your value by answering a question or solving a problem?	Where can you feature this content so they will see it?	What partnerships can you leverage to create more awareness?
Ex. Shoppers who love the look of mid-century modern design but have tight budgets, show ways to get the look for less	Ex. YouTube, Instagram, decorating blogs	Ex. Partner with vloggers who do reviews of couches, lifestyle influencers who feature interior design

Cultivate interest

Incorporate landing page essentials.

Headline	Sub-headline	Images/video
Ex. Design the mid-century couch of your dreams...for less!	Ex. Handmade furniture in stock and ready to ship from Austin, TX	Ex. Video zooming in on our most popular sectionals

Create a call-to-action with an attractive lead magnet. For example, “Click here to subscribe and receive your free fabric swatch kit.”

Encourage consideration

Use an email drip campaign to provide more helpful content.

Confirmation email	1st email content	2nd email content	3rd email content
Ex. Welcome to ModSofa! Click to select your free swatches.	Ex. Behind-the-scenes look at how our products are sustainably and locally made	Ex. Here are some sofa examples featuring the swatches you ordered	Ex. Book a free consultation with one of our designers

Drive decision making

Acknowledge the competition and address any objections. How can you communicate what differentiates your business and how you're the best fit for their needs?

Show you can be trusted. What testimonials, success stories, or compelling business statistics can you provide?

Incite action

Secure their decision.

What irresistible value or offer can you make?	How can you create a sense of urgency, so they won't procrastinate?	How can you upsell or cross-sell additional items or services?
Ex. Take 15% off your first custom order, free shipping, free returns, choose a free decorating item	Ex. Offer good for two weeks only!	Ex. Upgrade to premium or leather fabric for only xx. Complete the look with the matching ottoman.

Ensure loyalty

Keep them coming back to grow your business.

How will you ensure customer satisfaction?	How can you leverage them for reviews or referrals?	What new content or promotions can you offer to win their return business?
Ex. Personalized thank-you email enrolling them in loyalty program and asking them to rate their experience.	Ex. Offer incentive for providing a review.	Ex. New launch and quick ship items. Loyalty member-only sales events

Optimize your sales funnel

Evaluate your content

Use analytics to trace the customer journey through the funnel and notice how many were captured at each stage.

Campaign version A	Awareness Leads obtained	Interest Click-thru rate	Decision and action Conversion rate	Loyalty Retention rate

Which types of content garnered the most attention from your target audience?

Which channels captured the most attention?

How easy was your landing page to navigate? How can you make the call-to-action more prominent?

How can you make your offer more irresistible or urgent?

Test and compare results

Launch a second campaign to test its effectiveness against the first.

Campaign version B	Awareness Leads obtained	Interest Click-thru rate	Decision and action Conversion rate	Loyalty Retention rate

Which campaign captured the most initial awareness and why?

Which campaign was better at expanding the interest of the leads and why?

Which campaign converted the most prospects into leads? Why?

Which campaign was better at winning return business and why?

Track your customer retention rate

How well is your sales funnel retaining email subscribers and getting them to click thru to your website? What would you change for the next version to increase your return business?

Reflection

What surprised you the most about the results from the two different marketing campaigns you tested? How do you think your new understanding of sales funnels will impact the content you create for your audience?

Glossary

Use this glossary to review key terms and understand how they show up in the real world.



Definition



Practical use

Awareness

The uppermost stage of the marketing funnel, the purpose is to improve the visibility of your brand and start collecting leads.

Ways to generate awareness include paid-for advertising, sponsored social media posts, search engine optimization (SEO), webinars, videos, and in-person events.

Source: Copper Chronicles

Conversion

The process of converting a prospect into a lead and lead into a customer. For example, how many prospects opt in to your email list from your landing page.

The best conversion rate is any number higher than what you're currently doing. Even a 1% bump in conversion can make a significant difference.

Source: Marketing91.com



Definition



Practical use

Prospect

A possible future customer who is interested in knowing your product or service.

Source: Marketing91.com

Before any members of your target audience act, they are all prospects/prospective leads. Once they confirm their interest in your business by their actions, they will become full-fledged leads.

Landing page

A marketing web page designed to entice visitors with a call-to-action.

Source: Investopedia

An ideal landing page creates a seamless, engaging brand experience for your customers, which can encourage them to take the action that you want.

Lead magnet

A free, high-value resource or service that is offered in exchange for an opt-in email address.

Source: Kajabi.com

Creates a mutually beneficial scenario that makes users more inclined to trust you with their contact information.



Definition



Practical use

Sales funnel

The process of bringing your potential customer ever closer to making a buying decision through a series of marketing actions. Stages of a sales funnel include generating awareness, cultivating interest, encouraging decision and action, and building loyalty.

A successful sales funnel will include content that speaks to your target audience's needs or interests and keeps them coming back for more until they eventually decide to give you their business.

Source: Sendpulse.com

Call-to-action (CTA)

The next step a marketer wants its audience or reader to take.

Allows you to create a clearly delineated path to conversion, making it easy for consumers to follow, subscribe, visit your website, make a purchase, review your service, etc.

Source: Investopedia

Target audience

The group of people you want to receive your message.

Performing research to understand your target audience is critical to designing a sales funnel that they will respond to

Source: Marketingevolution.com



Definition



Practical use

Retention

Retention marketing, sometimes referred to as lifecycle marketing or loyalty marketing, is a term that essentially boils down to keeping customers engaged, happy, and spending.

Source: Retentionscience.com

The goal of a sales funnel is to not only convert leads into purchasing customers, it is to foster customer loyalty and retention.