

Your Guide to

Creating an Effective Sales Funnel



CREATING AN EFFECTIVE SALES FUNNEL

Every business needs a sales funnel if they want to succeed in their marketing efforts. So many businesses do not create a plan when it comes to marketing. Instead they do what everyone else is doing or what they feel is easiest or cheapest, without knowing whether or not it actually works. Sales funnels help business owners know how many potential customers they have, where they come from, and how they're going to be brought into the product cycle.

What is a Sales Funnel?

Essentially, a sales funnel (or any funnel) provides a way for you to look at your model visually. It will show at a glance what steps you need to take to get clients and customers to purchase your products or services. A sales funnel provides a lot of information about prospects, conversion rates, how long your prospects remain in the funnel, what it takes to get conversions and more.

Most sales funnel start like this:



Some funnels just have three main stages: Awareness, Evaluation and Purchase. Others have many more. No matter how you design your sales funnel it's important to put as much detail as possible into each of the different stages. This ensures you don't miss out on important information that will help you develop content to move a lead to become a customer.

No matter how many main stages your sales funnel has, it's what you plug into each stage that makes the real difference. This is what makes a business truly stand out and convert more prospects to customers.

Why is having a Sales Funnel Important?

Well-crafted sales funnels show how you attract qualified leads. With the right information and content it helps you move them through the sales process to make a conversion. It's a good way to visualize what you're going to do, have done, and what the measured results are when it's all said and done. Sales funnels help a business determine how they will grab their audience's attention, overcome objections, improve engagement and make more sales.

- **Quantify the Number of Prospects** – Being able to quantify the number of prospects that you have for your product or service and who they are will help you locate and attract them.
- **Accurately Predict Conversions** – Knowing your conversion rate will help you understand more about what you need to do to get the results you desire, including improving conversions and/or improving awareness.
- **Spot Changes in Metrics** – When you pay attention to the details and learn about each stage of the sales funnel, you'll be able to identify changes in metrics. Perhaps a new marketing campaign is improving awareness but is not improving your conversion rate. Why? What should you do?
- **Help Point Out Needed Improvements** – The data that you can gather to help make decisions will improve your business exponentially. Instead of just doing things because everyone else is doing them, you can identify exactly at what stage of your product funnel you should do it and why, and even how and for how long.
- **Helps Develop a Content Strategy** – Regardless of the stage, content is the fuel that will keep your sales funnel flowing. Every stage needs a different type of content to ensure the right response from the audience.

A sales funnel is a valuable tool to help you get deeper into not only how to market, but why and when to do certain things when implementing your overall marketing strategy. It is especially helpful when creating content and products that educate and serve your audience.

How to Plan a Sales Funnel

Creating an effective sales funnel is essential to having a long-term business. You want your business to not just last a long time, but also to prosper. Creating a sales funnel will assist you in reaching that goal better than most other things will. Plus, you can learn a lot about your business as you're creating it. Start with the basic funnel above, or if you prefer divide everything up among the stages to plan out your actions.

Ideas about what to plan for different stages of your sales funnel.

Awareness – This is the widest part of your sales funnel, where you want to bring your audience into awareness about your business's existence. These members of your audience don't know about you at all; they need to be made aware via education. For this stage you want to create publicity or entry products that are very general in nature and that educate your audience about the topic.

- **SEO** – Search engine optimization is using keywords and other tactics to encourage the search engines to send prospects your way due to their searches. Using “on page” and “off page” SEO is an important component to attracting new prospects during the awareness phase.
- **Advertisements** – You can run advertisements on social media like Facebook, or AdSense that drive visitors to your website and email lists. You can choose pay per click or banner ads or other listings to get clicks.
- **Press Releases** – Part of good SEO, this is a great way to get content out there so that your audience learns about you and finds you.
- **Overview Blog Posts** – General blog posts that provide decisions and information about the general problem your audience has and ways to solve them.
- **Informational Whitepapers** – Providing objective and useful information about topics of interest to your audience can help drive traffic to your site.
- **Overview Webinars** – Hold a webinar or Google Hangout On Air to address your audience about their pain points.

This is the stage where you want to create calls to action within the content that encourage your audience to sign up for email lists, follow you on social media, and sign up for your RSS feed and so forth to stay in touch.

Interest – Once your audience is introduced, they now know about you and see that you may be able to solve their problems. You know they're interested because they have signed up to receive your email list.

To keep their interest you may send them regular updates and offer products to them to teach them more about your products and services, and how you know their problems and can solve them. While the content you send them might still be in the same form (blog posts, eBooks, video and so forth) as the awareness stage, the information you send them in this phase should be different information.

- **ECourse** – Send a short 7 day eCourse series to them via email list, using a service like Aweber.com to deliver the messages that you pre-schedule.
- **Blog Posts** – Write evergreen blog posts that assume interest by the audience, and that give your audience more information and encouragement, create email associated with the blog post recommending that the subscriber go read that blog post and load it up into your autoresponder series.
- **EBooks & EReports** – Either free or paid eBooks given or sold for a low price are good entry products to promote to someone who has expressed interest in your products or services.
- **Short Videos** – Like the blog posts, you can use vlogs that are general and evergreen to educate your audience. Remember to point your email list to the videos with a message loaded into the autoresponder.
- **Overview Webinars** – Invite those who have signed up for your email lists to informal webinars or teleseminars. You can use a service like Instant Teleseminar to

automatically replay them so that you don't have to give a new one each time. These can also be loaded up to the autoresponder to put your marketing on auto-pilot.

- **Whitepapers** – Write an authoritative paper about the problems, products or services designed to educate your audience. Disseminate via social media, email and have available for download on your website.
- **Tip Sheets, Checklists & Infographics** – These are great types of content to use for an audience that is in the interest stage. Giving them more facts to work with will help them move down your product funnel faster.

Keeping the interest of audience members who have given you permission to market to them is a very important part of the sales funnel. If you plan your content and information correctly you can move them faster to the purchase phase.

Consideration – Like above, the client knows they need the product by now, but they need more information to determine that it's the right product to solve their problem. That involves a lot more information (like the interest phase), but information that's more in-depth, focused and personalized. Focus more on identifying the pain points of your customers and showing them how your products specifically will solve them.

- **Consultation Calls, Webinars & Teleseminars** – This is a great time to make appointments to speak directly to your audience. Depending upon the nature of your product these can be in person or via group teleseminar; or a live on-air roundtable or webinar where people can ask you questions directly.
- **EBooks** – Send your email list recipients an eBook that you normally sell as a gift in order to give them a taste of your work. Point your email list to a book you published on Kindle that you're having a free or low cost promotion for.
- **Message Boards** – Invite your audience to join you on your private message board, Facebook group or other area where they feel like that you have more personal access to you in order to build trust.
- **Product Demonstrations** – Can be recorded and posted as a vlog, made into an eBook, or conducted live depending on your audience and product.
- **Testimonials** – Ask others to tell about what your product or service did for them. Encourage this activity by having a contest.
- **FAQs** – Using questions people have asked in the past, or questions you feel that your audience may have develop a FAQ. Create an email series addressing each issue in your FAQ to help overcome objections. Create your FAQ based on potential objections.

Getting personal with your audience at this point will help pull them toward trusting you more and buying from you. First, you need to convince them that your product is better because of you. You can demonstrate this via the content you put out on social media, on your blog, and in other channels.

Intent – The consumer has now essentially made the choice to buy the product, but now needs to determine which product exactly they need when comparing one over the other. This is a good time to include content and the right branding in forms that actually compare one thing against another, and show why your brand is superior. These include:

- **Blog Posts** – Use blog posts to build confidence in your audience about your superior products and services.

- **Newsletters** – Use your email newsletters to point your audience to other places you've published, books you've written, and information that makes you stand out as an expert.
- **Web Copy** – Use the right words on your website to not only to attract search engines but to impress upon your audience how you are the right person to provide the product or service to them.
- **Packaging Design** – At this point one of the most important things you have going for you is that they're interested and have already expressed intent to buy. Devote the right amount of resources to your packaging to help strengthen that intent.
- **Product Descriptions** – An often overlooked method of establishing trust and expertise in the minds of people in the intent stage of the sales funnel.
- **Overall Branding** – Your branding should be cohesive on all platforms and channels so that every marketing effort ties into the next.
- **More Testimonials** – You can never have enough testimonials, get people to talk about you in interviews, on podcasts, in their books, and then recommend those to your audience.
- **Longer Webinars** – Use these to explore particularly important or complicated topics in greater detail.
- **Emotional Content** – If you know your audience well enough you can now use emotional trigger words that will move them toward the evaluation process to choose who to buy from. Tweak their sense of loss and feelings of inclusiveness to get the emotions rolling.

These buyers are going to buy, using the right content and words you can move them to the evaluation stage and toward choosing your product over someone else as long as you realize all these stages work together simultaneously and individually.

Evaluation – At this stage the buyer is already convinced they need a product like yours, but now they need to know for sure that yours is the right one for them. You'll still need to deliver content to them in the forms mentioned above and below, but the information needs to assume that the audience already answered several calls to action given in the above stages of your sales funnel.

At this stage you're convincing them that you're the person for the job and no one else. You can do that through various forms of content, including:

- **Specific Product Focused Webinars** – Attend and speak at small live webinars and roundtables with your super-affiliates as hosts.
- **Case Studies** – Collect all case studies that you've done and create an eBook out of them; deliver it to your email list for download.
- **Products Samples & Demos** – Sell smaller versions or offer a sneak peak of products by showing them on the web in videos, slideshows, or thumbnail form.
- **Free & Low Cost Consultations** – If you offer services, this is a good time to get your prospect on the telephone for a free or low cost consultation.
- **Proposals** – If you have a service based business, one way to overcome objections is to offer personalized proposals after a phone consultation. Within the proposal offer two or three different choices.
- **Coupons** – Offer a special limited time offer or coupon to encourage buying right now.
- **Trigger Words** – Evoke their fear of loss by ensuring that they know you're only offering so many of the products.

The entire point of any content or product now is to get them to purchase the next product in your list of products because they believe in you and trust you to provide what they need to solve their problems.

Purchase – This is where your audience makes some sort of commitment or makes an actual purchase. The purchase phase can actually involve several other stages of the product funnel in terms of your audience purchasing entry level products to try you out. It may also include some or all of the above and below content types.

- **Free Trials** – If your product is expensive or a continuity product, such as a membership to an inner circle or group coaching, it can be good to offer a free trial period.
- **Live Demonstrations** – Webinars demonstrate the value of promoting your product to others.
- **Follow Up** – Never miss following up with any customer who has purchased with you. Once they have made a purchase, no matter which product it is, or even if they bought everything you offer, now it's important to keep in touch with them.
- **Referrals & Affiliates** – Customers are the perfect people to gather testimonials from, as well as to recruit as affiliates, thus perpetuating the cycle.

Your job is not over just because someone makes a purchase. Even if they have just bought your most expensive product or service, there is more to do. Follow up with them and turn them into fans that promote your products and services. No one is more qualified or better at promoting your products than someone who loves them and buys them.

Using Your Sales Funnel to Generate Product Ideas

When you are deciding on new products to create, use the sales funnel to help you come up with ideas. Look at the entire sales funnel and line up the products you currently have to where they seem to fit on the funnel.

Know Your Goals – Are you trying to attract, qualify, convert or retain customers? Often the stage for which you're creating the products or content can help determine what the point of the product or content is.

Understand Your Audience – Be able to identify the pain points of your audience and create products and services that solve these pain points. Look at the different stages to help you get into the frame of mind of your customer, based where they are inside the funnel.

Identify Gaps – Once you line up all the products and services you already have within the sales funnel, look for gaps that you can fill with various products and services.

By knowing why you are creating the products or content, you can create better, higher-quality products and content that get the results you desire. The stages will lead you to creating more products and services that fill the needs of your customers and solve their problem at each stage, thus causing a long-term loop – ending with purchasing and starting over with awareness for the next product you create.

Tools for Creating Sales Funnels

You can draw your sales funnel using pen and paper, as well as software that is readily available. Don't skip this part because having a visual representation will help you make your business stronger, and if you are a service provider then delivering marketing services to your clients can help you identify gaps that need to be covered to improve marketing at all stages.

[Pipedrive.com](https://www.pipedrive.com)

The screenshot shows the Pipedrive website's 'Sales Funnel Management' page. At the top, there's a navigation bar with 'Home', 'Features', 'Pricing', and 'About' links, along with 'Sign up' and 'Sign in' buttons. The main heading is 'Sales Funnel Management'. Below it, a paragraph explains that a sales funnel provides a clear view of opportunities and helps create an accurate map to improve chances of making or breaking revenue goals. To the right, a box asks 'Looking for a powerful sales funnel manager?' and offers a 'Try Pipedrive' button with a 'With 15 day free trial' note. The central part features a diagram of a sales funnel with four stages: 'Pipeline', 'Prospects', 'Leads', and 'Closed'. To the left of the diagram, text explains 'What is a sales funnel and how do we measure its health?' and lists three key metrics: 'Number of opportunities in your funnel', 'Avg. time to close', and 'Avg. time to convert'. Below the diagram, there's a list of four key metrics that can measure the health of your funnel, with the first one being 'Number of opportunities in your funnel (AO). You should'.

Using Pipedrive.com for sales funnel management can help you identify the number of opportunities you have at each stage of your funnel. You can use it to create a usable visual representation of your funnel easily by inputting the information and allowing the system to generate your funnel. A pipeline follows the idea that if you can measure it, you can manage it.

[Smartsheet.com](https://www.smartsheet.com)

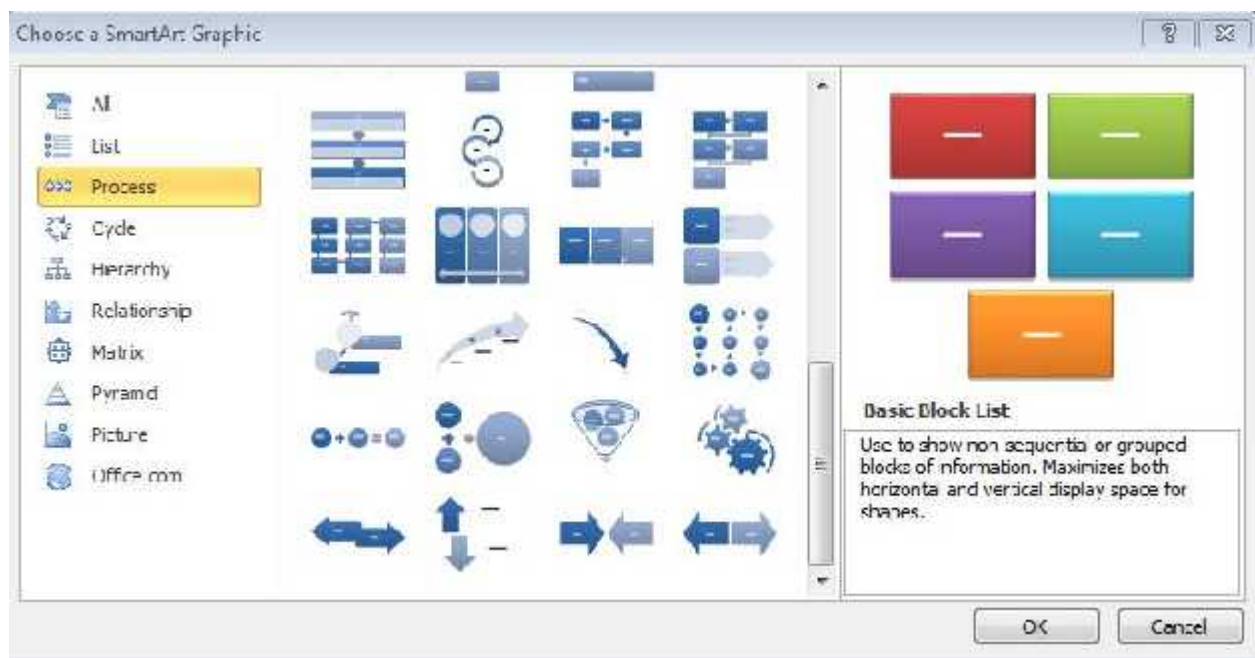
The screenshot shows the Smartsheet website's 'Sales Pipeline Template' page. At the top, there's a navigation bar with the Smartsheet logo and a 'Sign up' button. The main heading is 'Sales Pipeline Template'. Below it, a paragraph explains that Smartsheet is a 'Sales Tracking and Collaboration tool at its simplest'. To the right, a box asks 'Try Smartsheet For Free!' and offers a 'Try Smartsheet For Free' button with a 'With 15 day free trial' note. The central part features a diagram of a sales pipeline with four stages: 'Pipeline', 'Prospects', 'Leads', and 'Closed'. To the left of the diagram, there's a list of four key metrics that can measure the health of your funnel, with the first one being 'Number of opportunities in your funnel (AO). You should'.

They are called “Pipelines” on Smartsheet.com, but it’s still a sales funnel. Use their templates to get started on making a special sales funnel for you using charts. Just click the information and fill in the questions to get started.

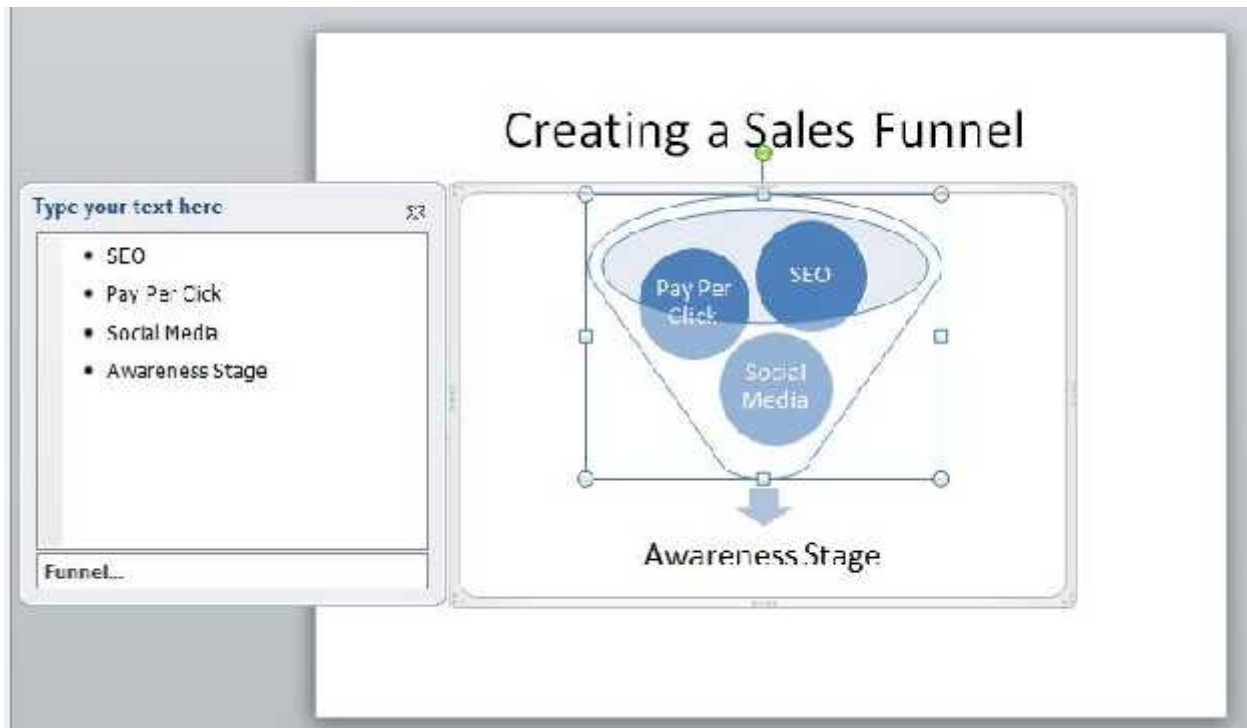
[PowerPoint](#)



Yes, you can create an individualized sales funnel easily using PowerPoint. By using SmartArt along with “processes” and other features within the PowerPoint program, you can create your chart.



Then choose which graphic you want to use. You could choose Pyramid and then use the controls to drag it upside down. In this example we added some information for just the “awareness” stage.



Microsoft Excel

You can also use Microsoft Excel to create a product funnel. Using Excel can be very useful due to the way you can manipulate the data. After all, the main reason to create a sales funnel is to better monitor and control your metrics so that you can improve sales. Set your metrics, then use the charting function to create visual representations of the data.

As you can see, there are a variety of methods that you can employ to create a working sales funnel to improve your sales and marketing.

When creating your sales funnel, ask and answer questions like:

1. What are the ways in which I can let the world know about my products and services?
2. How does my audience like to receive information?
3. Who does my audience get their information from?
4. What format does my audience like to get their information?
5. How can I collect the client information to turn website visitors into true leads?
6. What is the best way for me to build relationships with my audience?
7. How can I interact with and learn from my audience?
8. What can I do to encourage my audience to trust me?
9. What is the best way to make any lead into a repeat customer?
10. How can I turn my customers into referral magnets and repeat the cycle?

Match up each answer to where it belongs in the sales funnel so that you can focus on the style and type of content that you need to create a long-term client sales cycle. In other words, you don't want them to just disappear out of the funnel; you want to loop them back around to start the process over again.

Describe How to Accomplish Each Goal

At each stage, you need to identify the tools, channels and resources that you'll use to reach your goals. For instance at the awareness phase you may want to use Google AdSense or Facebook Ads, and hire someone to write a series of email messages and blog posts.

Assign Metrics to Each Tactic, Product Idea and Content Format within the Stage

Without real numbers you have no way of classifying whether any given plan worked or not. Give very specific metrics for your goals such as "I will increase website visitors by 100 per week within 60 days by placing Facebook Advertisements."

Test Your Results

Like with most things in marketing you'll use an educated guess as to which channels are best for you to use to implement the task in each stage of your sales funnel. That's why keeping track of metrics is important. If something you're doing isn't working, you can adjust and tweak it, or drop it all together. If something is working, you can do more of it.

As you can see, there is more to it than just creating the sales funnel. You need to design it, and then enter the results you want to obtain at each level, how you'll achieve those results, and be able to quantify everything along the way. If you do this, you'll achieve far greater results than if you practice marketing without any direction.

Presenting Sales Funnel Reports to Clients

Depending on what type of products and services you offer your clients, chances are if you're involve with marketing at all you probably want to create sales funnels for your clients. When you do this, you can identify more work that you can accomplish for your client and become a resource to your client. You'll become known as someone who can deliver returns instead of someone who is just another expense, thus expendable.

Add Sales Funnel Creation as a Service

You have a choice in how you want to accomplish adding sales funnels to your services. You can focus on generalities or make truly specialized funnels for each of your clients. You can offer a general sales funnel as an entry product offering, then teach your clients why they need a more in-depth sales funnel by educating them on sales funnel creation and use.

Provide Examples of Sales Funnels

Start with creating a sales funnel for yourself that you can share with your clients. You can share it in a variety of ways from blog posts, to eBooks, to white pages and webinars. The point is to show how you can create them, and how useful they are.

Deliver Them in Useable Format Depending upon the Goal

If you are going to sell the service of creating a usable and editable sales funnel you may want to use PowerPoint or Excel to do it, or you may want to sell your clients on creating accounts with Pipedrive.com or Smartsheet.com. If you want to show them the funnel and keep the rest to yourself for future services you can also use these tools and then just print the reports in PDF format to share with your clients.

Create a “To Do” List from the Sales Funnel

In your sales funnel report you want to deliver more than just the pretty visual, you want to also write up a report describing the metrics, including how you’ll measure for results and report for results and list the actionable items. You can use a “to do” list format along with a timeline for your client. In this way, especially if you’re the project manager, you can just gather the approvals necessary to implement the actions.

Pricing Sales Funnel Reports

Pricing depends upon many factors, including your target audience, how in-depth the reports will be, and whether or not you will be implementing and /or managing the implementation of the sales funnel after you finish the report. You can use the tried and true hourly rate, or a project rate.

- **Determine How Long It Takes** – While you don’t want to get too tied up in hourly work, it is important to be realistic about how long it takes to create a sales funnel that works. It will depend on how big the business is and how many funnels you’ll need to create. For instance, you may want to create only a social media marketing sales funnel.
- **Figure out How Many You can Reasonably Do** – By figuring out how long it takes, and what’s involved you’ll be able to know how many you can create and how many you want to create in any given week or month which can also help determine the price. If you plan to do very few only for special coaching clients you can charge more than if you plan to offer less specialized sales funnels.
- **Decide Whether You’ll Offer Implementation** – If you also plan to offer implementation services you might consider offering the sales funnels at a lower rate as a way to get more business managing someone’s marketing.

If you can automate a lot of the process, it will take less time to create the product funnels. For instance, you might develop a questionnaire that you give through Google Forms that automatically feeds into an Excel spreadsheet, helping you create the Sales Funnel easily. Determine what the sales funnel is worth to your clients and start promoting them at different price points that you’re happy with to see which price works best.

Sales funnels will work for your business, as well as your client’s businesses, because they take the guesswork out of marketing products and services. You will not only understand each stage of the buying and sales process better as it relates to your business and clients, but you will get to know your clients’ businesses a lot better so that you can identify places where you can serve them better in terms of products and services that solve their problems.



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