

**LEVERAGE**  
*Baby!*

## *Your* Funnel Plan

### STEPS

1. Read through the whole task to understand the funnel planning process
2. Choose the best ongoing funnel strategy for your business
3. Choose whether you will use your strategy as evergreen or launch
4. Map the content of your funnel strategy

### Introduction

At the end of this worksheet you will have created and be ready to implement your on-going funnel strategy to double or triple the size of your audience.

Let's get started!

## Choose your funnel strategy

Strategy	Key features	This is my ongoing strategy
Basic Funnel to Sales Call	<ul style="list-style-type: none"> <li>• Free download (this could be a pdf)</li> <li>• Call to action on the thank you page</li> <li>• Send follow-up emails offering a call to the people who downloaded the free resource</li> </ul>	<input type="checkbox"/>
Webinar to Sales Call	<ul style="list-style-type: none"> <li>• Host a webinar</li> <li>• (optional) Invitation to sales call on webinar thank you page</li> <li>• Invitation to sales call at the end of the webinar</li> <li>• If client has not signed up for a sales call already, send follow-up email series of 2-5 emails reminding them to get their free call</li> </ul>	<input type="checkbox"/>
Webinar to Purchase	<ul style="list-style-type: none"> <li>• Host your webinar</li> <li>• Include a direct sales pitch for your offer</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• More direct and more challenging</li> <li>• Less individualized than a 1:1 call</li> </ul>	<input type="checkbox"/>
Visibility to Purchase or Sales Call	<ul style="list-style-type: none"> <li>• Flood the web with your presence, e.g. interviews, Facebook Live and Instagram</li> <li>• At the end of each “publicity piece” invite your audience to a sales call (higher price point) or include the link to the sales page (lower price point)</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• Perfect for extroverts with active social media profiles</li> </ul>	<input type="checkbox"/>
Challenge to Purchase or Sales Call	<ul style="list-style-type: none"> <li>• Run a multiple day challenge for your community</li> <li>• Direct your prospective clients to a call/sales page at the end of the challenge</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• Ideal for audiences who need more interaction</li> </ul>	<input type="checkbox"/>

Strategy	Key features	This is my ongoing strategy
Video Series to Purchase or Sales Call	<ul style="list-style-type: none"> <li>• Run a multiple day challenge for your community</li> <li>• Direct your prospective clients to a call/sales page at the end of the challenge</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• Ideal for audiences who need more interaction</li> </ul> <p><b>Cat recommends: compress the content of the three videos into a webinar. In my experience with clients, this converts better!</b></p>	<input type="checkbox"/>

## Evergreen or launch

Strategy	Pros	Cons	This is my strategy
Evergreen	<ul style="list-style-type: none"> <li>• Automated</li> <li>• Hands-off</li> <li>• Consistent revenue</li> <li>• Ongoing opportunity to adjust</li> </ul>	<ul style="list-style-type: none"> <li>• Lower conversion rates</li> <li>• Selling and delivering at the same time</li> </ul>	<input type="checkbox"/>
Launch	<ul style="list-style-type: none"> <li>• Generates momentum</li> <li>• Higher conversion rates</li> <li>• Sales period and then delivery period</li> </ul>	<ul style="list-style-type: none"> <li>• High intensity</li> <li>• Hands-on</li> <li>• One opportunity to get good results until next launch</li> </ul>	<input type="checkbox"/>

## Map out your funnel plan

Now it's your turn to map out the content your funnel plan in detail. Include each step of the funnel including all traffic options you plan to use.

Step	Item	Details

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