# Sales Funnel Magic Made Easy– Cheat Sheet

## Introduction

* Your sales funnel is a core part of your business
* It’s the process of moving people from unaware prospect to loyal customer
* Success is most often a result of the sales funnel

### Learning objectives:

* Identify key components of a high-performing sales funnel
* Generate ideas for your own funnel
* Brainstorm opt-in offers for getting people into your funnel
* Design the key elements of your opt-in page
* Brainstorm possible one-time offers for your funnel
* Draft your first email follow-up sequence
* Identify products you can promote in your follow-up emails
* Measure the effectiveness of your funnel
* Choose the most effective tools for your funnel
* Creating a good sales funnel is an ongoing process
* You’ll benefit from walking through all the steps in the process
* If you already have a sales funnel in place, you might find things to improve

### Expectations

Before we start the course, take a minute to think about what you want to get out of it.

In the Action Guide, write down three skills you expect to gain.

# Module 1 - What Is a Sales Funnel and Why Is It Important for Your Success?

* Your sales funnel is what leads customers to purchase your products or services
* They transform from random prospects to buyers
* As the funnel narrows, they are primed to make a purchase

## The Sales Funnel Explained

* It’s a sieve that leads prospects through the sales process
* It’s wide at the top, (entry point) and narrow at the bottom (point of purchase)
* Attract casual visitors with a special offer then use techniques to offer them deals

## Why Businesses Use Sales Funnels

* They make the process more efficient
* Also make it more predictable
* You can track different metrics at different points

## An Example of a Sales Funnel

* Visitors can sign up and receive a free eBook
* Once they’ve downloaded it, you can begin marketing to them
* Those who sign up are truly interested and most likely to make a purchase

## Drive Them Away

* Remember you don’t need to appeal to everyone
* You only need to focus on those who are truly interested in your product
* Losing subscribers is a good thing as you don’t want to waste your time with those who will never buy

### Action Steps:

1. Do you already have a sales funnel? If so, compare the amount of sales you’ve made from your sales funnel vs. products you’ve sold through other methods.
2. If you don’t have a sales funnel already, start thinking about what part of your business would benefit most from creating one.
3. Review the graphic at the start of this module – What Happens in Your Sales Funnel – so that you’re familiar with it for the rest of the course.
4. Use the **Sales Funnel Planning Checklist** throughout this course and at the end to make sure you’ve completed all the necessary steps.

# Module 2 - The Key Components of an Effective Sales Funnel

* For a sales funnel to work, a few key elements must be in place
* You need to consider the offers you make
* They should gradually increase in size and price to weed out those who aren’t interested
* Decide which ways you’ll keep in touch with your prospects to further qualify them
* Get your prospect list down to only the serious buyers
* At the end of your funnel you should have a list of loyal customers that you can sell to again and again

### Learning Objective:

* Identify key components of a high-performing sales funnel

## Types of Offers

### Opt-In Giveaways

* A freebie usually offered in exchange for a person’s details
* The entry point for the sales funnel

### Front-End Offers

* Paid offers that work just like freebies but can be more effective
* Keep the price very low so you know people have the potential to be serious buyers in the future

### Subscription Products

* Low-priced but more profitable because you charge a monthly fee
* People who pay a monthly fee are much more likely to buy high-ticket items

### One-Time Offers

* Allude to a level of urgency
* Visitors have to sign up immediately or miss out on the chance
* Front-end offers are low priced or free and low commitment
* Pricier back-end offers are what really qualify prospects

## Keeping in Touch

* It’s important to keep in touch with prospects
* They shouldn’t hear from you only when you’re selling something
* Offer helpful content to build a relationship
* The first step is the ‘thank you’ page
* Use this opportunity to make them another offer or provide more free content
* This will help you further qualify prospects

## Sales Funnels and SEO

* Remember the funnel shape
* You want to cast your net wide to begin with
* The landing page should be search engine optimized to direct as much traffic as possible

### Action Steps:

Think about sales funnels you’ve been filtered through yourself:

1. What were the components?
2. What types of funnels did you find attractive or compelling?
3. What components turned you off?

# Module 3 - Ideas for Your Sales Funnel

* Each funnel is a similar shape
* But no two are exactly the same
* You have many options when it comes to working out specifics

### Learning Objective:

* Generate ideas for your own funnel

## Research Ideas

* Start with your product idea and make sure there’s a market for it
* Perform keyword research to see if people are searching for it
* Then look at products in your niche and competing products

## Examine Your Competitors’ Funnels

* Investigate competitors’ funnels to find weaknesses
* You need to offer something unique that they’re not
* See how they market from the perspective of a prospective customer

## Brainstorm Your Funnel

* Brainstorm potential offers
* Knowing what competitors are offering will help target what your market could really use
* What kinds of products would help qualify potential buyers?
* Identify traffic sources
* This might include search engines, social media, blogs, etc

## Plan it Out

* Lay out your sales funnel in a visual way that allows you to see the big picture
* Use tools such as mind maps and/or diagrams
* A good sales funnel is solid and detailed, but flexible
* Track conversions and identify the strongest and weakest spots
* Troubleshoot and find ways to improve

### Action Steps:

Start researching and planning your own sales funnel. This is just a draft at this point, so don’t worry if you need to go back and edit it.

1. What is the purpose of your funnel?
2. Who will be your target audience?
3. What do your competitors’ funnels look like? Where can you improve?

# Module 4 - What Are the Best Types of Opt-in Offers?

* The opt-in offer is the entry point of your sales funnel
* It’s an incentive to give up names and email addresses
* You have several options to consider when thinking about the type of opt-in you offer

### Learning Objective:

* Brainstorm opt-in offers for getting people into your funnel

## Electronic Downloads

* Some of the easiest products you can create
* An eBook is a PDF, a report is a short eBook
* Your download could also be a resource guide, infographic, checklist, template or other quick problem-solver

## Training Courses

* Segmented courses that come with educational aids such as worksheets
* Guide the reader step-by-step through the process of solving a problem
* Can be presented in different formats and offered in different ways

## Apps and Free Software

* Programs have a high perceived value
* Mobile apps are becoming increasingly popular
* Help used do something through the use of their mobile devices

## Free Trials and Consultations

* Offers that let prospects try out your service for a limited time
* Give people a true taste of the value you offer
* Could be a limited-time membership, use of service, a free trial, or a free strategy call

## The Elements of an Excellent Opt-in Offer

* Even a free product offer must deliver results
* It’s has to be irresistible and solve an urgent problem
* It needs to be something unique that people won’t find elsewhere
* It can help if your incentive is a limited-time offer as it adds urgency
* Your offer needs to be visible everywhere possible
* Create a landing page and put it on the sidebar of your blog, and any other relevant sites

### Action Steps:

Brainstorm different opt-in offers for the start of your funnel and identify the one you will use. Use the **Opt-In and Product Offers Brainstorming Worksheet** in your Action Guide to take notes.

1. Who is your ideal customer?
2. What are their urgent needs or problems?
3. Solutions you can offer

Pick 3 ideas from your list of solutions and brainstorm possible opt-in offers and the best format to present each one in. Focus only on those related to the sales funnel you are currently planning.

# Module 5 – The Entrance to Your Sales Funnel: The Opt-In Page

* Your opt-in page is critical as it’s the entryway to your funnel
* Draw in attention with a good headline that identifies a problem
* Lead people down with good copy then call to action

### Learning Objective:

* Design the key elements of your opt-in page

## Selling Your Freebie

* In order to sell your free offer, you still have to promote it
* Why would customers want your free content over someone else’s?
* People are ‘paying’ with their information

## Features and Benefits

* The features are an important part of your product
* Make it easy to scan and read them
* Tell the reader how each feature will benefit them

## Social Proof

* Testimonials and reviews from other people who have claimed your offer
* Endorsements add a great deal of credibility to your offer
* You could give away your product initially to get reviews to further promote

## Audio and Video

* A short audio or video clip can help to promote
* Say hello and talk about how the offer will help them
* Add a personal touch, lend credibility and give people another way to digest content

## Call to Action

* Tell people to do themselves a favor and sign up now
* It should be interspersed with your content as well as placed at the bottom
* Also place near the top so people can sign up immediately

## Simple is Best

* Keep it simple or risk losing prospects before you’ve had a chance to communicate anything
* No fluff or distractions
* No outgoing links or unrelated content
* Make bold claims about what your offering
* Your offer has to deliver on those claims
* It not, people won’t be satisfied

### Action Steps:

1. Look around at opt-in pages that you like and note which aspects you want to use on your own.
2. How will you create your opt-in page? We recommend using a special landing page plugin for WordPress like [OptimizePress](http://www.optimizepress.com) or a platform that specializes in landing pages, such as [Leadpages](http://www.leadpages.net), [Unbounce](http://unbounce.com/), and [ClickFunnels](http://clickfunnels.com/). All these tools will give you templates already proven to convert.
3. Write out some draft copy for your page, especially the features and benefits of your opt-in offer.

**NOTE**: You’ll also need to connect your opt-in page to an autoresponder service for capturing emails. We don’t cover those details in this program, however you can find tutorials for setting up your email lists and connecting to your opt-in page inside whatever tool you decide to use.

# Module 6 - What Are One-Time Offers and How Do They Work?

* A one-time offer is an excellent way to qualify prospects early on in your sales funnel
* Most commonly an offer that you make to prospects as soon as they’ve shown interest
* Often a deeply discounted product or freebie that’s only available right then
* Also used during the purchase process, before completing a purchase

### Learning Objective:

* Brainstorm possible one-time offers for your funnel

## Why One-Time Offers Work

* One-time offers work because they add urgency
* Exclusivity raises its value in the prospect’s mind
* They feel as if they’re privy to something others are not

## The Mechanics of a One-Time Offer

* Present it to prospects immediately after they’ve shown interest
* By showing people your offer before they’ve finished the process, they’re more likely to get it
* As they’ve already accepted one request, they’re more likely to accept a second
* This is also great for qualifying perpetual prospects vs. buyers
* If you offer something at a low price and they don’t take it, they’re probably only after the freebie for now
* These prospects are less likely to make purchases soon and may need a lot more content first

## The Exit Pop-Up

* A pop-up window that appears when a visitor leaves the page
* Although many visitors ignore these, some will take the time to read and act on them

## OTOs for Your Email Subscribers

* You can also send OTOs to your email subscribers
* You can gradually increase the price of offers in later emails
* This naturally leads qualified prospects to back-end products
* Keep in mind that OTOs don’t always need to be profitable for you
* They might just get people to subscribe, or to trust you
* Think of it as a way to lead customers through your funnel

### Action Steps:

Brainstorm different one-time offers and identify one you can use in your funnel. Use the **Opt-In and Product Offers Brainstorming Worksheet** to take notes.

1. Types of specials
2. Your own products
3. Affiliate partner products

# Module 7 - Email Follow-ups: What to Send Your List

* Getting people to sign up is important but only the first step
* Now you have to successfully market to them
* Keep in touch with a continual flow of steady content to build relationships

### Learning Objective:

* Draft your first email follow-up sequence

## Fulfilling Your Promises

* You should give your subscribers everything you promised on your opt-in page
* You should be continually sending subscribers hints, news, exclusive content, special offers and any other valuable information

## Keep Your Messages Relevant

* You need to stick to only content that’s relevant to what you promised
* People could become disconnected if you send them unrelated content
* Promotions especially need to be laser-focused

## Content vs. Promotions

* You should be sending out a higher volume of valuable content relative to promotions
* Over-promoting may feel like spam
* Think of your campaign as a way to help them gain information with occasional promotions being thrown in

## Listening to Your List

* Find out what kind of helpful content they need by listening and paying attention to their needs
* Prospects and customers will tell you exactly what they need if they know how to
* Research your market by connecting online

## Further Freebies

* As you market to your list, keep the freebies and good deals coming
* Mix them in with the regular content you’re offering
* Building strong relationships now will translate to sales later

## How Much is too Much?

* Different niches will respond differently
* The only way to be sure is to experiment
* Make sure you stay consistent in the frequency with which you email

## Planning Your Follow-Ups

* Use all the tools available to plan your follow-ups
* It’s best to have your entire campaign mapped out before you launch it
* Never attempt to wing it

### Action Steps:

Use the Email Series Planner Spreadsheet or another tool to plan out the topics for at least 7 emails in your follow-up series.

1. Make sure you have several emails that first provide valuable content that’s relevant to your opt-in freebie, before you pitch a product or service.
2. Use the P.S. area to refer subscribers to a resource or remind them of an earlier offer or valuable piece of information.
3. Copy the topics of your emails over to your Workbook, along with any specific tasks you’ll need to complete later, so that you have everything in one place. You can continue to update the worksheet in your Workbook as you make changes.

# Module 8 - What Products Should You Promote in Your Follow-ups?

* Follow-up emails are all about building relationships and qualifying buyers
* The best way to convert prospects to customers
* The offers you make should be chosen very carefully

### Learning Objective:

* Identify products you can promote in your follow-up emails

## Relevance is Key

* A good product is one that’s relevant to your market
* Should be related to the reason they signed up
* Solve problems, address needs and implement immediately
* Offering something unrelated will turn off subscribers
* Don’t simply market whatever products because you’ve got their details
* Irrelevant products will not build relationships and will cost you subscribers

## Where to Find Products

* You can use your own products, or affiliate products
* Your own products are exclusive, you know the quality and the profit is higher
* You don’t have to create affiliate products, but need to check them first
* Use an online marketplace to search for affiliate products
* Use keywords that are relevant to your niche
* Be selective in terms of reputation and quality.

## Stand by Your Products

* You may lose lots of subscribers with just one bad product
* Everything you offer needs to be something you can stand behind
* Try out products before you promote them

## Many or Few

* Debate exists over whether to offer lots of products, or focus on a handful
* Offering lots is fine, as long as they’re all outstanding
* It’s safer and easier to focus on a few

### Action Steps:

Brainstorm different offers you can make in follow-up emails or as future higher-ticket upsells.

1. Look through your own products and service offerings.
2. Look at programs or people you are already an affiliate for.
3. Your colleagues in your industry.
4. Tools and services you already use. See if they have affiliate programs.
5. Browse through [Clickbank](http://www.clickbank.com), [JVZoo](http://www.jvzoo.com), [Share a Sale](http://www.shareasale.com) or other affiliate networks for ideas.

# Module 9 - Is Your Sales Funnel Working for You?

* An efficient sales funnel is tracked and measured
* This is the most important thing you’ll do in your entire process
* You’ll see what’s working and what isn’t

### Learning Objective:

* Measure the effectiveness of your funnel

## Traffic Sources

* Success of your landing page depends upon traffic
* Always monitor traffic statistics
* Focus on sources that are bringing in a great deal of traffic

## Your Opt-in Conversion Rate

* How many of your visitors take you up on your offer
* If the rate is low, consider tweaking the page
* Start with the headline before changing anything else

## Testing Landing Pages

* A tried and true method to tweak is to split-test
* Create different pages and see which performs best
* You can test different elements at a time to figure out what works best

## Site Activity

* Monitor analytics to see what people are doing on your site
* Find out how much time they spend on each page and what they click on
* If they don’t spend too much time, you might need to change your copy

## Sales on Back-end Offers

* Keep taps on sales figures for back-end offers
* Identify where you’re losing prospects
* You might need to add more small ticket offers throughout the funnel

## Email Conversions

* Monitor conversion rates for email promotions
* Drop old offers that aren’t converting
* Look for areas in the funnel where there are lots of unsubscribes

## Tools to Help You Monitor

* [Google Analytics](http://www.google.com/analytics/) is a free program that provides lots of different stats
* Professional landing page themes should also offer data
* You can install tracking software tools too
* Autoresponder programs offer a range of stats for email marketing
* Social media measurement tools monitor traffic and activity on social media
* Get a dashboard where you can manage all of your profiles at once

## Your Monitoring Routine

* Monitoring is an ongoing task that must be done regularly
* Divide tasks into categories based on frequency
* Set aside time every so often for in-depth monitoring

### Action Steps:

1. Identify the elements of your sales funnel that you will be measuring. For example, clicks from traffic sources, opt-in page conversions (list sign-ups), email opens, email link clicks, sales conversions for specific offers, or other measures that are important to you.
2. What will you measure at each stage of your sales funnel? You can refer to your map of your funnel and note the measures next to each component or use the table in your Workbook.
3. What tools will you use for those measures, i.e. where will you find the data?
4. If you already have a funnel in place, look at those measures and identify places you can improve.

# Module 10 - The Best Tools for Creating a Sales Funnel

* You don’t have to do everything yourself
* There are tools for automation, integration and analyzation
* Three tool types that are useful are:
  + Sales page tools
  + Follow-up tools
  + Product sales tools

### Learning Objective:

* Choose the most effective tools for your funnel

## Opt-in Page Tools

* Professional tools include:
  + [OptimizePress](http://www.optimizepress.com)

* + [Leadpages](http://www.leadpages.net)
  + [Unbounce](http://unbounce.com/)
  + [ClickFunnels](http://clickfunnels.com/)
* All offer high-converting design templates
* Templates speed up the process – just add your own elements
* These tools are designed to integrate easily with your autoresponder
* They come with built-in SEO features
* Other tools for other functions like mobile friendly sites

## Email Marketing Tools

* Autoresponder programs include:
  + [Aweber](http://www.aweber.com/)
  + [MailChimp](http://www.mailchimp.com)
  + [GetResponse](http://www.getresponse.com)
  + [ActiveCampaign](http://activecampaign.com/)
  + [Infusionsoft](http://infusionsoft.com/)
* It’s impossible to effectively market through email without an autoresponder
* Manage sign-ups, organize subscribers, send messages and track results

## Tools to Help You Sell

* Shopping cart systems that automate the sales process include:
  + [1ShoppingCart](http://1shoppingcart.com)
  + [Volusion](http://www.volusion.com)
  + [Shopify](http://www.shopify.com)
* Load the program with the data it needs and it’s ready to take orders
* You can also use measurement tools to estimate campaign ROI

## Shopping Around

* Most quality programs come at a cost
* A serious investment that will save you time and allow you to scale up
* Always shop around, try free trials and read reviews before buying

## Estimating ROI

* Compare conversion rates with what you’re spending and look for ways to increase conversions
* Use a more in-depth analysis platform such as Optimizely for better testing and optimization.

### Action Steps:

1. What tools are you currently using in your sales funnel?
2. If you’re just starting out, what tools do you need to acquire or want to change?
3. Start doing your research and getting recommendations. Select the ones that look easiest to use for a beginner

# Conclusion

* If you’ve finished all the activities, you’ll now have:
  + Ideas of what you can put in your funnel
  + A list of opt-in offers
  + A draft of opt-in page copy
  + A list of ideas for one-time offers
  + A draft of your first email follow-up sequence
  + A list of products to promote
  + Measures to assess effectiveness
  + A list of effective tools for creating and monitoring your funnel
* If you didn’t have a funnel set-up already, you might have to work a bit
* Ask for help with technical aspects
* You can outsource the heavy-lifting
* Don’t worry if it doesn’t work first time around
* Building profitable sales funnels is something you’ll continue to work on

### Action Steps:

1. Do a final review of your **Sales Funnel Planning Checklist** to make sure you have everything in place for a successful funnel.
2. Use the planning table in your Action Guide and start taking action!