SALES FUNNEL

Planner

The

Digital Duchess

SALES FUNNEL PLANNER

INTRODUCTION: THE PURPOSE OF A SALES FUNNEL

Ask any marketing professional and they'll tell you it's far more expensive to convert a new customer than to increase the value of an existing client.

Here's something else the most successful business owners know: The customer who has purchased recently is much more likely to purchase again—even if "recently" was only 10 minutes ago. That's why upsells and downsells are so prevalent in every purchasing flow.

And that's exactly what your sales funnel is designed to do:

- To increase the value of your average customer by strategically offering additional or related products
- To make the right offer at the right time (creating a "no brainer" sale your clients can't resist)
- To make the most of every tool and strategy at your disposal

You very likely already have a sales funnel in place. In fact, if you're selling anything online, I can guarantee you do have a funnel—but unless you've designed it with some specific goals in place, it's probably not doing its best work for you.

The best sales funnels lead naturally from one product to the next, just as your free funnels lead from low-commitment to increasingly higher commitment offers. The main difference is that free funnels end when a sale is made. In a sales funnel, the goal is to create more sales from a single client, thereby increasing the average value of every single sale.

STEP 1: PRODUCT INVENTORY & CATEGORIZATION

Your sales funnel will not work well if you're simply offering random product after random product. Think about what happens when you visit Amazon to buy a coffee maker. As you're browsing, Amazon shows you items that are "frequently bought together" and those that "Customers who bought this item also bought."

Helpful for you? Yes. Helpful to Amazon's bottom line? Definitely. But it would be neither if, while you're shopping for coffee makers, Amazon is showing you electric razors, cell phone cases, and fridges.

The key to increasing the average sale value is to carefully choose which products and services make sense at the time you're presenting them.

That means that before you can build an effective and logical sales funnel, you have to know what inventory you have available. Think of it as designing a storefront. Without knowing exactly what products you're selling, it's going to be nearly impossible to build the window displays.

The same is true for your sales funnels. Unless you know what you're selling, setting up a funnel will be tricky.

A really solid sales funnel takes into account all levels of products (all price points) as well as all the steps your ideal client might be on in their journey. For example, a business coach might have products ranging from $97 to $9,997 or more. They may range from beginner-level courses to platinum level private coaching, or they may focus exclusively on beginner, intermediate, or advanced strategies.

In fact, many successful online businesses actually make use of several small funnels that all feed into one large, overarching funnel. We'll talk more about this strategy in Step 7, but for now, you'll want to begin picturing in your mind how your products lead from one to another. Think of it this way: When you go to college, you cannot simply jump right into a calculus class without first studying algebra.

The same is true if you have multiple levels of products or programs in your funnel. For a business coach, that might mean you have a beginning course about email marketing, and an advanced course about list building. Until a client fully understands the first, the second is not going to be very helpful.

Now you probably already have a good idea which courses or products fit together naturally. You may have even created them in that order based on feedback you received from previous offers.

If your business evolved more organically, though, you may have a mix of products that seem unrelated. If that's the case, then a good place to start is to simply categorize your business according to:

- The level your clients are currently at (beginner, intermediate, advanced)
- The types of training you offer

Exercise: Inventory and Categorize

My products appeal most to customers at these levels:

- ☐ Beginner
- ☐ Intermediate
- ☐ Advanced

My training categories include:

- ____
- ____
- ____
- ____

Product Name	Price	Level	Category

STEP 2: FILL IN THE HOLES

Now that you have a high-level overview of your products and who they might appeal to, it's time to fill in the blanks—and unless you've been systematically building a funnel for a very long time, there will be holes.

Simply put, a hole is this: A lack of a product or program to fill the needs of your client at a specific place in your funnel.

For example, if you're coaching clients on how to use social media to build a brand following, and you have courses about Facebook groups, Twitter, Instagram and Pinterest, then the obvious holes in your funnel are LinkedIn and YouTube, and possibly others. Looking at your products from another direction, if you have existing products in the beginner space, but nothing for intermediate or advanced clients, that may be a hole to fill as well.

One important way to identify holes in your offers is to simply listen to what your market is telling you. If your clients frequently ask for help in a specific area, that's a great candidate for a new program. Likewise, if you're referring clients to other coaches or training, then clearly there is a need that deserves exploring.

Just because you have a hole doesn't mean you have to create an entirely new program to fill it. Doing so might have you stuck on this step for weeks or even months!

Instead, smart entrepreneurs look at their existing content for ideas:

- Can you bundle two or more small programs together to make one amazing offer?
- Can you update a retired product with new information?
- Can you repurpose content you've previously created, such as audio or video training, workbooks, or even blog posts?

Keep in mind, too, that not all holes need to be filled. You know your ideal client, and if they are beyond the beginner stage, then there's no point in wasting your time and talents creating training for an audience you do not serve.

Exercise: Plan to Fill the Holes

STEP 3: ALL ROADS LEAD TO ROME

Ask yourself this question: What problem do I solve for my clients?

Now, you might solve lots of problems, from how to build a website to how to run a Facebook ad, but you also have one overarching purpose for your business. This is the basis for your highest level program, and it's the question you should keep in mind as you're building out your funnel.

Because here's the thing, the ultimate goal for every funnel you build is to sell that program.

For example, if your top-level coaching program is a 12-month, high-touch VIP group for bloggers transitioning into product creation, then your funnel might look like this:

Step 1: A $97 workshop teaching how to develop a product in a weekend using content they already have.

Step 2: A $497 multi-module training program designed to turn multiple products into a membership/continuity program

Step 3: A 16-week group coaching program to help members focus their branding and message to attract their ideal clients.

At each step along the way, you should be able to say, "This program relates directly to the primary problem I help my clients solve."

If, on the other hand, your funnel is filled with products that teach how to run a telesummit or how to manage your bookkeeping, then you may have a disconnect, as those trainings do not lead naturally to the ultimate goal.

Exercise: Make the Connection

What's missing in your overall funnel?

Product Type	Price Point (low/med/high)	Level	Category

STEP 4: UPSELLS AND DOWNSELLS

Whew! So now that we've dug deep into your product and package offers and we can clearly see how each one leads to the next, and ultimately, to your top-level program or services, it's time to work out the logistics of actually making the sale and one powerful technique is the strategic use of upsells and downsells.

First, a little terminology clarification:

- **Upsell**: An offer presented immediately following a sale. Typically an upsell is offered after the buy button is clicked, but before a credit card is charged, which makes the decision easier for the buyer (no need to enter credit card info twice). An upsell will almost always be more expensive than the original purchase, and is generally a natural add-on (although not a necessity). For example, a $97 DIY training course might have a $297 group coaching upsell.
- **Downsell**: An offer presented when the upsell is refused. Like an upsell, the downsell is offered after the buy button is clicked but before the checkout is completed. Unlike an upsell, though, the downsell is generally a lower value product. In the example above, if the $297 group coaching upsell is refused, the downsell might be a bundle of video replays of previous group calls for $47. The content is still highly related to the original product, but again is not a necessity.

These upsells and downsells are all offered at the point of purchase. In later steps we'll talk more about other ways to offer upsells and downsells, but for now we're focusing on the actual funnel pages.

It is possible to make more upsell and downsell offers. In fact, you can nest several offers together, and you will see this technique in action if you purchase online products frequently. Even your hosting account and domain registrar are putting this strategy to use—sometimes to the point of annoyance!

And that's an important point to keep in mind: Too many upsells and downsells will quickly irritate your buyers, so it's a good idea to start with a single upsell and single downsell until you've tested the strategy. You can always add more steps to your funnel later.

How your upsells and downsells are presented will largely depend on your shopping cart and/or payment processor. Some providers, such as ClickFunnels, easily automate the process, while others will require a bit of work on your end to set up. Look for options for "OTO" (one-time offers) or funnels in your provider's FAQ section for complete instructions.

If your provider does not offer automated upsells and downsells, you can easily create your own funnel flow simply by linking pages together in a logical order.

Exercise: Plan Your Upsells and Downsells

Product	Upsell	Downsell

STEP 5: MAKING GOOD USE OF YOUR REAL ESTATE

Your funnel doesn't stop working just because a sale has been made. In fact, this is where you should actually focus even more of your efforts! Remember what we said at the beginning of this planner: Clients who recently purchased are likely to purchase again—especially if they're presented with the right offer in the right place. And in this case, the right place is on the access page for the product they've just purchased.

Unlike your blog or your sales pages, your product access pages get the full attention of everyone who visits them. Not only that, but they typically visit more than once (especially in recurring memberships or for multi-module courses), and they are actively looking for assistance with their problem.

This makes your access pages prime real estate for cross sells, special offers, coupons and other incentives. Of course, you've already shown them your upsell and your downsell, but that doesn't mean you have nothing left to offer.

Unlike an upsell (more of a good thing) or a downsell (a little less of the upsell), a cross sell is a related product that fills a specific need your customer is facing.

For example, a client who has just purchased your training about turning blog posts into a book is very likely going to need information on how to market their book soon. Your book marketing training is the perfect cross sell for them, and the ideal place to present it is on the access page for the product they've already purchased. That way, they'll see it every time they log in, and it will be ready and waiting for them right when they need it.

Coupons and special offers are another great option for your access pages, because they make your existing clients feel as if they have access to exclusive deals (they do) and lets face it, we're all human, and we all like to feel special.

Even better—and depending on the delivery platform you use—is to make offers based on what your customers have already purchased. So rather than showing all members the same $20 coupon for the same training (that they may already have) you can customize the offer to only include products they don't already own.

This kind of cross selling is typically only available in high-end carts and memberships such as Infusionsoft, Access Ally, Clickfunnels and the like, but it's a powerful technique that can work to dramatically increase the value of every customer—and your value to them as well.

Exercise: Create Your Cross Sells & Special Offers

Main Product	Related Product	Special Offer Coupon or Bonus

STEP 6: PLANNING YOUR EMAIL SEQUENCE

Smart, successful business owners know that the emails don't end when the purchase is made. Instead, they use the follow up emails to ensure customers are using (and loving) the training they've purchased.

We've all known people who buy course after course, and who never bother to download or study the materials. Maybe you're guilty of doing the same.

As a course creator you could look at that and say, "Well, not my problem if they don't take the time to use what they paid for." And that's just what many people do say. The problem with that attitude is this: Your buyers will never discover just how awesome your training is, and they will never graduate to the next level courses you offer, if they don't make use of the ones they've already purchased.

And that's where your follow-up email sequence comes in. It's the perfect vehicle to encourage consumption of any course, with:

- **Reminders** to log in as new content is released ("Welcome to Module 3! In this lesson, you'll learn…")
- **Additional tips** related to the content ("On page 45 I shared how to use images in your Facebook ads to encourage clicks, but here's another method that works really well…")
- **Case studies** from previous students ("In module 2 you studied Pinterest marketing, and I thought you'd like to hear how Clarice used these same techniques to grow her mailing list by more than 3,000 subscribers…")
- **Encouragement to share** their results or join a conversation in your private Facebook group ("In the group, Susan is looking for help to zero in on her message. Click here to share your thoughts…")
- **Unannounced bonuses** to help your customers do even more with their training ("Hey we've had lots of questions about how to create infographics for your blog, so I thought I'd make you a video showing exactly how I do it…")

The point of all of this is to keep your buyers involved, and to encourage them to open every email you send, and that's because your email follow up sequence is an ideal place for additional, related offers—not only yours, but those of your colleagues and JV partners as well.

There are likely plenty of related products and services you could be promoting as an affiliate throughout your sales funnel, and we'll dig into that a little deeper in the next steps.

Exercise: Plan Your Follow Up Sequence

Day	Email Purpose	Notes
1	Product delivery/access details	
3	Unannounced bonus	
6	Check in with a tip	
10	Case study + cross sell offer	
14	Community building/encouragement	
17	Related product offer	
21	Reminder to download	
24	Affiliate Offer	

STEP 7: BEHAVIOR BASED SEQUENCES

If you're still sending the same emails to everyone on your list—regardless of how they react to your offers—then you're definitely leaving money on the table. Time to rethink your email strategies to:

- Present the exact right offer at the right time
- Stop annoying buyers with sales messages they don't need or want
- Avoid wasting money sending unnecessary emails
- Add more of a personal touch by meeting your subscribers right where they are in the process

Behavior-based follow-up sequences come in several forms, and each has a unique purpose and call to action. For example, you might create:

- An objections and FAQ sequence for those who visit your sales page but don't buy. (Combine this with Facebook retargeting ads for a powerful sales machine that will run on autopilot.)
- An abandoned cart sequence for those who click the buy button but fail to complete the sale.
- An upsell sequence for those who buy but decline the upsell.

All of these sequences can be triggered with the use of a script inserted into your sales, checkout and thank you pages, and then connected to your email autoresponder service. From there it's a simple matter to move subscribers from one campaign or sequence to another, based only on the actions they take.

Behavior-based email follow-ups are also ideal for promoting affiliate offers. For example, if your subscriber has clicked through to your sales page but didn't buy, it could be because your course isn't quite what they need right now. Chances are there are similar courses that may be a better fit for them, and they'd appreciate you sharing the options with them.

Worried that promoting a competitor might take a bite out of your bottom line? Don't be. If a subscriber isn't buying your product, but does buy from your competitor, there's a good chance they are just not a fit for you. It's not personal, and it says nothing about the value you offer your clients, it's simply a matter of whose personality and style resonates with a buyer.

Exercise: Plan Your Behavior-Based Follow-Ups

Abandoned Cart Follow-Ups

Day	Email Purpose	Notes
1	Remind them of the cart link	
2	Answer potential objections	
4	FAQs	
6	Case study	

Upsell Sequence

Day	Email Purpose	Notes
1	Get more from your purchase (tips)	
2	FAQs	
4	Case Study	
6	Lite offer (similar, but lower cost product)	

No Sale Sequence

Day	Email Purpose	Notes
1	Remind them of the sales page link/deadline	
2	Answer potential objections	
4	FAQs	
6	Final reminder/price going up/cart closing	

STEP 8: MORE PRIME PROMOTIONAL SPACE

The fact is there are lots and lots of places you can make offers to beef up your sales funnel and keep the cash flowing. We've already covered several in the previous steps, but I want to encourage you to think strategically at every step along the way, from product planning, to marketing, to delivery and beyond.

Simply asking yourself, "What do my clients need to complete this step?" will kickstart the process. For example, if your multi-module training has a section about using infographics to generate traffic to a blog post, then you're doing your customers a disservice if you don't also offer resources for:

- Vector graphics
- Graphic designers
- Data compilation
- Software and apps to create infographics
- Advanced courses to learn more

And you'd be doing yourself and your business a disservice if you don't use an affiliate link where appropriate.

Many entrepreneurs and product creators make the mistake of thinking that because they charge for a product, they should avoid including anything even slightly promotional inside. In reality, that could not be further from the truth, and here's why:

> *By including promotional (including paid affiliate links) inside your products, you are helping to* ***defer the cost for your customers.***

Think about it. Not only are you providing your customers the information they need—and that they depend on you to provide—but you're also helping to reduce the cost of the training itself, knowing that you'll make up the difference in affiliate sales.

Of course it goes without saying that your promotions should be limited to only those products and services that genuinely add value to your trainings, and which are the best choice for your customers. Your integrity is far more valuable than any affiliate sale, so never promote a program you would not.

So with those guidelines in place, always ask yourself, "What else will make my customers' lives easier and add value to this training?" Then share it with them.

Exercise: Plan Your Related Products Offer

Main Product	Affiliate Product	Your Link

Exercise: Create a Resource Guide

A resource guide is a short (one or two page) printable resource your clients and customers can use as a reference when shopping for tools and training. Resource guides are commonly used as opt-in incentives, but they also make a fantastic bonus addition to a paid product, and will help your buyers make better use of the information you're providing.

Resource or Tool	Purpose/Blurb	Your Link