

Business Funnel Mapping Template

📌 Goal: Define your **end-to-end business funnel** to create clarity, improve client flow, and identify areas for automation.

📍 STAGE 1: AWARENESS (How do potential clients find you?)

Where do NEW people discover you? This is how you attract leads into your world.

✓ What are your top traffic sources? (Check all that apply & add specifics!)

- Organic Social Media (Instagram, TikTok, LinkedIn, Facebook)
 - ◆ Which platform(s) work best for you? _____
- SEO & Blog Articles
 - ◆ Do you have a website driving traffic? YES / NO
- YouTube or Podcast
 - ◆ What's your content focus? _____
- Paid Ads (Facebook, Google, YouTube, TikTok)
 - ◆ What's your current ad strategy? _____
- Referral Marketing (Word of Mouth, Collaborations, Affiliates)
 - ◆ How do you leverage partnerships? _____
- Other: _____

📌 Where do MOST of your leads come from today?

📌 What's a traffic source you WANT to optimize or automate?

📍 STAGE 2: LEAD CAPTURE (How do you collect & nurture leads?)

Once someone finds you, what happens next? How do you engage & capture their details?

✓ What's your primary lead magnet or method of capturing leads? (Check all that apply & add specifics!)

- Free Download (PDF, Checklist, Guide)

- ◆ What's the title of your freebie(s)? _____
- Webinar / Live Training
 - ◆ How often do you host this? _____
- Free Community (Facebook Group, WhatsApp, Discord)
 - ◆ How do you engage new members? _____
- Newsletter / Email Subscription
 - ◆ How often do you send emails? _____
- Application Funnel (Form before booking a call)
- Other: _____

 **What's your MAIN way of capturing leads today?**

 _____

 **What's a step you can improve in your lead capture process?**

 _____

STAGE 3: CONVERSION (How do you turn leads into paying clients?)

Once someone enters your world, what's the process that gets them to BUY?

 **What's your primary sales method? (Check all that apply & add specifics!)**

- 1:1 Sales Calls
 - ◆ What's your close rate on calls? _____
- Sales Page (Direct Checkout)
 - ◆ Do you track your conversion rate? YES / NO
- Live Webinars (Pitching at the end)
 - ◆ What's your usual conversion rate? _____
- DM / Private Chat Selling
 - ◆ What's your process for handling leads in DMs? _____
- Other: _____

 **What's the biggest bottleneck in your conversion process?**

 _____

 **What's one way you can improve your sales conversion?**

 _____

📍 STAGE 4: DELIVERY (How do you fulfill your offer efficiently?)

Once someone buys, what's the experience like for them?

✓ How do you deliver your product/service? (Check all that apply & add specifics!)

- 1:1 Coaching / Consulting
- Group Coaching / Mastermind
- Online Course / Membership
- Digital Product (Ebook, Templates, Notion Docs, etc.)
- Physical Product / E-Commerce
- Other: _____

📌 What systems/tools do you use to deliver your offer?

✍ _____

📌 What's the #1 thing you'd like to improve about your delivery process?

✍ _____

📍 STAGE 5: RETENTION & GROWTH (How do you keep & grow your clients?)

How do you maximize customer value & create repeat buyers?

✓ What's your client retention strategy? (Check all that apply & add specifics!)

- Upsell / Next-Level Offers
- Membership / Recurring Revenue Model
- Client Referral Program
- Ongoing Support / Check-Ins
- Community Building & Engagement
- Other: _____

📌 What's your strategy to increase client lifetime value?

✍ _____

📌 What's the #1 thing holding you back from growing repeat revenue?

✍ _____

SUMMARY TABLE: Your Business Funnel At A Glance

📌 (Fill in this summary based on your answers above!)

Funnel Stage	Your Strategy / Process	What Needs Improvement?
Awareness	How do people find you?	What's missing?
Lead Capture	How do you collect leads?	What could be smoother?
Conversion	How do leads become buyers?	Where do people drop off?
Delivery	How do you deliver the offer?	What could be streamlined?
Retention & Growth	How do you keep/grow clients?	What could increase revenue?

🔥 What's the #1 action step you'll take to improve your funnel?

 _____