# Part 1: Funnel Design + CRM Structuring

**1A. Funnel Design Simulation**

| **Stage** | **Definition** | **Upgrade Criteria** | **Owned By** |
| --- | --- | --- | --- |
| Lead | Site visitor, form filled, ad clicked | Engages with a marketing touchpoint | Marketing |
| MQL | Matches ICP + downloads resource / attends webinar | Multiple engagements + matches ICP | Marketing |
| SQL | Requests demo / shows buying intent | Clear intent to purchase | Sales |
| Trial User | Signed up for free trial, incomplete onboarding | Has trial activity | Sales + CS |
| Customer | Purchase confirmed | Paid subscription | Sales |

**1B. CRM Configuration Blueprint**

**Core Data Fields to Track:**

* Contact Name
* Company Name
* Email & Phone
* Lead Source (Ad, Event, Referral, etc.)
* Industry
* Lifecycle Stage
* Lead Score
* Last Touched Date
* Engagement Notes

**Automations to Implement:**

* Auto-tag based on lead source
* Lifecycle stage auto-updates based on behavior
* Reminders for no follow-up in 48 hrs
* Instant sales alert for demo bookings

**Dashboard Views:**

* Sales Rep View: Follow-ups due, response rate, active opportunities
* Growth Manager View: Conversion rates by funnel stage, campaign ROI
* CEO View: CAC trends, LTV trends, weekly funnel health summary