Sales Funnel Audit Template

Section 1: Funnel Overview

Map your current funnel stages and note definitions, conversion rates, and issues.

Funnel Stage	Definition	Target %	Actual %	Notes / Issues
Lead Captured				
Qualified Lead (MQL)				
Sales Accepted Lead				
Discovery / Demo				
Proposal Sent				
Negotiation				
Deal Closed - Won				
Deal Closed - Lost				

Section 2: Funnel Leak Detector

Answer these:

1. Where is the biggest drop-off?

2. Are stages too long?

3. Which stage loses the most leads?

4. Is handoff between marketing and sales clear?

5. Are key metrics tracked?

6. Are poor-quality leads entering early?

Section 3: Funnel Efficiency Scoring (1-5)

Score each area and add notes for improvement.

Area	Score	Comments
Lead Quality		

Sales Funnel Audit Template

Funnel Visibility		
Stage Clarity		
Follow-up Consistency		
Deal Win Rate		
Time-to-Close		
Data Accuracy		
Lead Source Tracking		

Section 4: Next 3 Actions

1. _____

2. _____

3. _____