How to Map Your Sales Funnel

Last Updated / Reviewed: Jan 10th, 2023
Execution Time: *~30 min*

Goal: To have a visual representation of how your funnel works.

Ideal Outcome: Your visual representation of your sales funnel is easily understood by anyone and you're able to share it with other people in your organization.

Prerequisites or requirements: You need a Google Account.

Why this is important: It's important to have a clear overview of how your business is currently generating clients in order to then assess where you might be losing customers, and how you could improve and make them better.
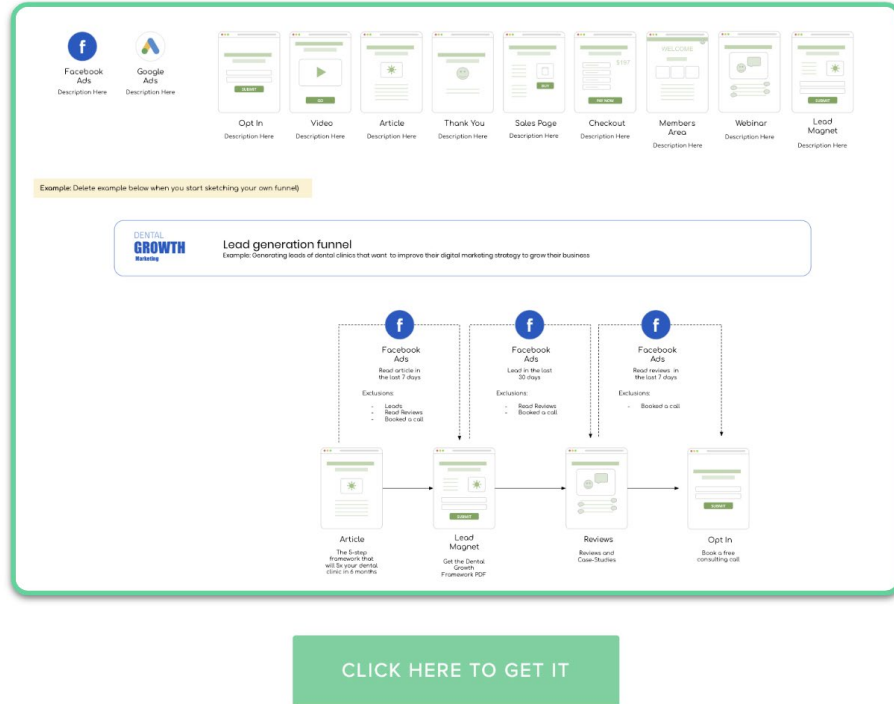
Where this is done: In Google Drawings (optionally Google Analytics as well)

When this is done: This template should be kept up to date with your current funnel.

Who does this: The person responsible for marketing.
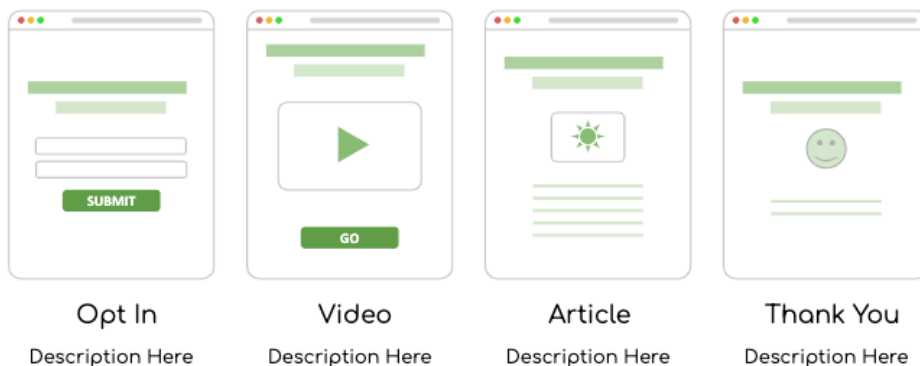

● Environment setup

1. Go to "File → Make a copy" and make a copy of the "ClickMinded SOP Library - Funnel Design Template" below:
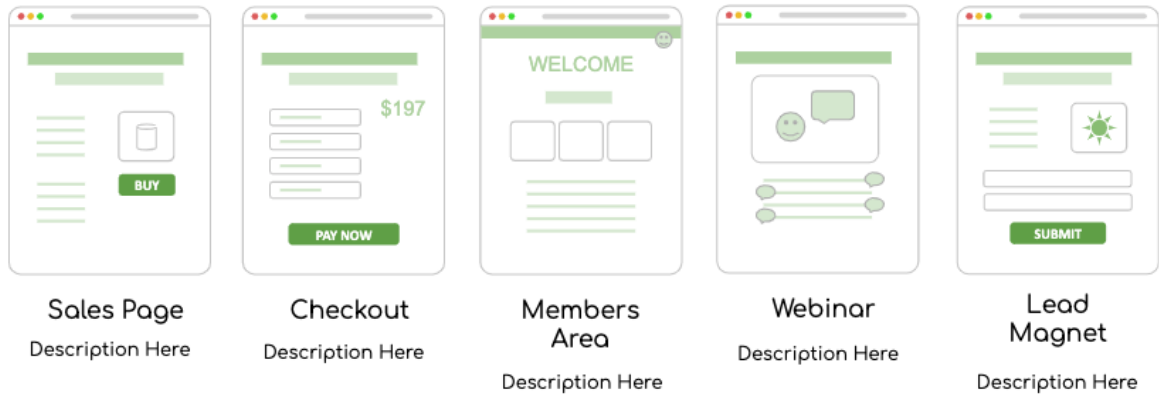

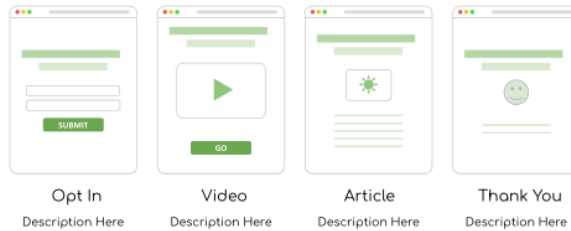
CLICK HERE TO GET IT

● Get Familiar with your template

1) Get familiar with ClickMinded's SOP Library - Funnel Design Template:

This template comes with 9 pre-built elements that should suit pretty much every business type, the elements are editable just in case you still make adjustments to them:

| Opt In | Video | Article | Thank You |
| Description Here | Description Here | Description Here | Description Here |

Sales Page
Description Here

Checkout
Description Here

Members Area
Description Here

Webinar
Description Here

Lead Magnet
Description Here

Adding elements to your funnel: You can drag and drop elements to the canvas as long as you click and hold the 'Option' key (Mac OS) on your keyboard while dragging. This will automatically create a copy of that element for you to use.
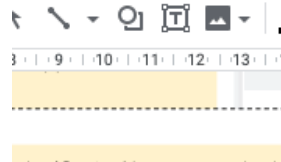

Opt In
Description Here

Video
Description Here

Article
Description Here

Thank You
Description Here

Editing elements: Double-clicking the element will allow you to edit it freely.

Email Marketing
Description Here

Connecting elements:

1. Click the line selection tool on the top, and select 'Arrow':

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2. Connect all your elements as you see fit:

Opt In   Thank You

Description Here   Description Here
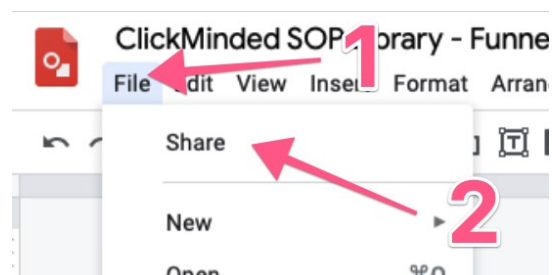
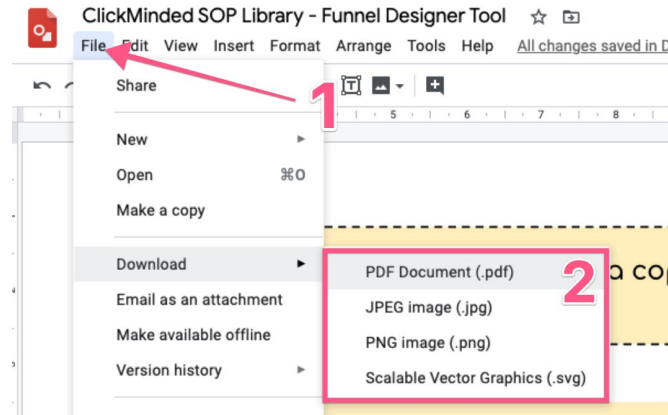**Collaborate**: Take advantage of Google Suite's collaboration features

a) **Commenting**: Right-click any element and select 'Comment':
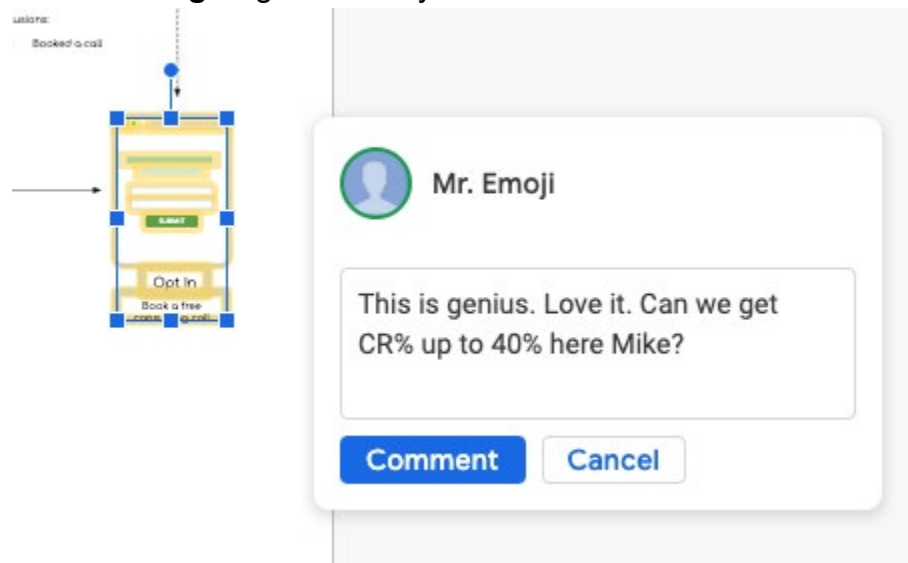
b) **Sharing**: Click File → Share → Select your sharing option

**Exporting**: You can export to PDF, JPG, PNG or SVG

Note: Need more elements or features? Send a request to hello@clickminded.com;

● Use the template to draw your current funnel

1) From beginning to end, think about the main journeys that your customers are making throughout your funnel, that includes:
   a) **Traffic Sources (organic, ads, email, etc):** Which ads are shown to the customers at each stage, how are they finding you organically.
   b) **Landing Pages:** Which relevant pages are you sending your traffic with the intention of getting your traffic to perform an action.
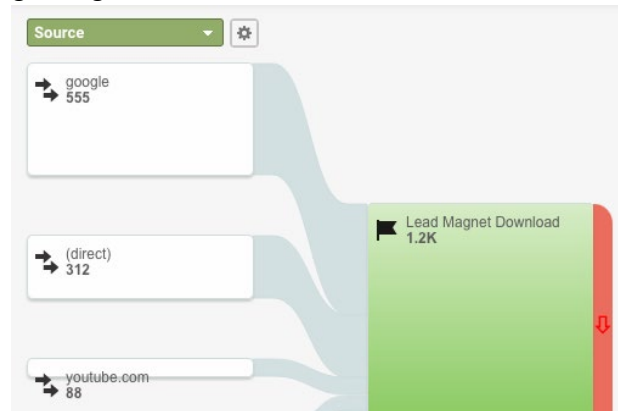   c) **Offers:** Which offers are you making to the customer at that stage.

   Note: If you are unsure, many times you can use Google Analytics' Reports to give you a few hints:

   a) The Behavior Flow report to give you an initial overview:
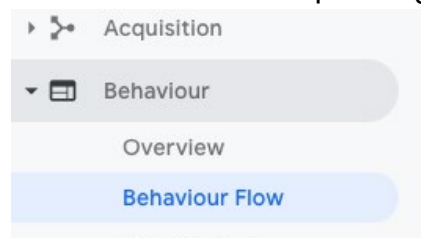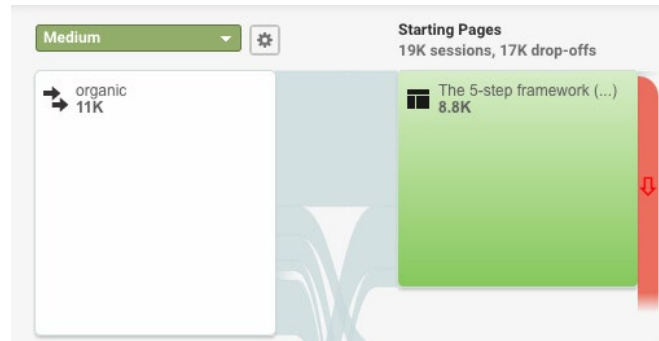
b) The Goal Flow report to give you an idea on how your goals are getting hit:

2) Add the most relevant journeys to your template, it is possible that you might have multiple funnels on your website, it will also depend on the level of detail that you would like to get into.

    a) Example:

        i) **High-level:**

            Organic Traffic → Lead Magnet → Mini-Course → Purchase

        ii) **Detailed**:

            "**Blog Post:** Learning Spanish for beginners" → "**Lead Magnet:** Learn Spanish in 3 Days Checklist" → "**Mini-Course:** From Zero to Hero" → "**Purchase:** The complete Spanish proficiency course"

3) That's it! In the end, you should be looking at how your funnels currently look like, you can use this document now to share it with your team-mates or contractors so that everyone understands how your funnel works, brainstorm how you can make it better, or, if you're an agency, send it to your client.

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Click here to get the most up-to-date version of this SOP