MARKET & SELL

SALES FUNNEL WORKSHEET

Turn market interest into a disciplined path to revenue.

2026 EDITION • PRACTICAL BUSINESS RESOURCE

01 / FUNNEL DEFINITION

Define the Revenue Path You Are Building

A funnel is the measurable progression from market attention to qualified opportunity, purchase, and continued customer value. Define one offer and one priority path before calculating performance.

Offer, market, and planning period

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Priority customer and buying situation

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Funnel decision	Definition
Primary business objective	
Entry point or demand source	
Primary conversion action	
Sales motion	Self-service / Assisted / Consultative / Partner-led
Average sales-cycle assumption	
Primary revenue measure	
Funnel owner	
Review cadence	

Working rule: A funnel stage represents a verified change in customer commitment or seller knowledge, not merely an internal activity.

02 / AUDIENCE & OFFER

Clarify Who Buys and Why

Funnel performance depends on the relevance of the offer and the quality of the audience. Define the customer outcome, qualification conditions, proof, and buying barriers before increasing lead volume.

Dimension	Decision
Priority audience or account type	
Problem, trigger, or desired progress	
Customer outcome	
Offer and scope	
Price and commercial structure	
Reasons to believe	
Primary alternatives	
Likely objections or risks	
Decision makers and influencers	
Urgency or timing conditions	

Qualification principle

What must be true for this customer to receive value and for the business to serve them profitably?

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03 / STAGE ARCHITECTURE

Define the Funnel Stages

Every stage needs a clear entry condition, customer action, owner, required evidence, and exit condition. Keep the model simple enough to use consistently.

Stage	Entry condition	Required action / evidence	Exit condition	Owner
Reach / awareness				
Engaged visitor				
Lead / inquiry				
Qualified opportunity				
Proposal / checkout				
Customer / won				
Onboarding / activation				
Retention / expansion				

Stage governance checks

- ☐ Each opportunity can occupy only one active stage.
- ☐ Entry and exit conditions are observable and consistently applied.
- ☐ Inactive, disqualified, lost, and recycled records have defined statuses.
- ☐ Owners and next actions are required for active opportunities.
- ☐ Stage dates are recorded so time and velocity can be measured.

04 / DEMAND SOURCES

Evaluate How Prospects Enter the Funnel

Compare sources by fit, volume, cost, conversion quality, cycle time, and customer value. A large source is not necessarily a productive source.

Source	Audience fit	Volume	Cost / effort	Lead quality	Conversion	Decision
Organic search / content						Invest / Test / Maintain / Stop
Social / community						Invest / Test / Maintain / Stop
Paid search						Invest / Test / Maintain / Stop
Paid social / display						Invest / Test / Maintain / Stop
Email / existing audience						Invest / Test / Maintain / Stop
Referral / word of mouth						Invest / Test / Maintain / Stop
Partner / affiliate						Invest / Test / Maintain / Stop
Events / speaking						Invest / Test / Maintain / Stop
Direct outreach						Invest / Test / Maintain / Stop
Marketplace / retail						Invest / Test / Maintain / Stop

Source measurement plan

Source	Tracking method	Primary metric	Owner
1			
2			
3			
4			

Source or campaign to discontinue, improve, or test next

05 / QUALIFICATION

Create the Qualification Standard

Qualification should protect customer fit, sales capacity, delivery quality, and economics. Use consistent criteria without turning the process into unnecessary friction.

Criterion	Required condition	Evidence / question	Weight	Score
Problem / need				
Customer or account fit				
Value potential				
Authority / decision process				
Timing / urgency				
Budget / commercial fit				
Delivery feasibility				
Strategic or risk fit				

Qualification outcomes

Outcome	Required next step
Qualified - advance	
Nurture - not ready	
Refer / redirect	
Disqualify - poor fit	
Revisit at defined date	

06 / CONVERSION PATH

Design the Customer’s Next Steps

Map the information, proof, interactions, decisions, and commitments required to move from interest to purchase. Remove avoidable uncertainty and effort.

Stage	Customer question	Required proof / experience	CTA / next action	Friction / risk
Awareness				
Engagement				
Lead capture				
Qualification				
Evaluation				
Decision				
Purchase				
Onboarding				

Conversion asset inventory

Asset / interaction	Purpose	Owner	Ready
Landing page / product page			☐
Lead form / checkout			☐
Proof / case study			☐
Proposal / sales presentation			☐
Follow-up sequence			☐
Onboarding confirmation			☐

07 / FOLLOW-UP

Build the Nurture and Sales Cadence

Follow-up should help prospects make an informed decision, not simply repeat the same request. Define timing, purpose, channel, value, and exit conditions.

Touch	Timing	Purpose	Message / value	Channel	Owner	Exit condition
1						
2						
3						
4						
5						
6						
7						

Objection and response bank

Objection / concern	What it may signal	Response / proof

When follow-up stops, pauses, or changes ownership

08 / FUNNEL ECONOMICS

Calculate Volume, Conversion, and Revenue

Use consistent stage definitions and a defined period. Begin with observed data where available; clearly label assumptions when the funnel is new.

Stage	Starting volume	Conversion %	Ending volume	Average time	Value / revenue
Audience reached					
Engaged					
Leads					
Qualified					
Proposals / carts					
Customers won					
Retained / expanded					

Economic assumptions

Measure	Current / assumption	Target	Source / note
Average revenue per customer			
Gross margin per customer			
Customer acquisition cost			
Sales and marketing cost			
Payback period			
Customer lifetime value			

Most important economic sensitivity or assumption: _____

09 / FORECAST

Build a Funnel-Based Revenue Forecast

Work backward from the revenue target using average value and stage conversion assumptions. Create a base case and a conservative case rather than treating one forecast as certainty.

Forecast input	Conservative	Base	Stretch	Evidence / assumption
Revenue target				
Average customer value				
Customers required				
Qualified opportunities required				
Leads required				
Traffic / audience required				
Average sales cycle				

Monthly forecast

Month	Leads	Qualified	Won	Revenue	Confidence
1					High / Med / Low
2					High / Med / Low
3					High / Med / Low
4					High / Med / Low
5					High / Med / Low
6					High / Med / Low

10 / PIPELINE MANAGEMENT

Establish Ownership and Operating Discipline

A healthy funnel requires timely updates, clear next actions, consistent data, and disciplined review. Define how the team will manage active opportunities and exceptions.

Operating rule	Standard
Required record fields	
Stage update responsibility	
Next-action requirement	
Maximum age by stage	
Inactive opportunity rule	
Lost-reason requirement	
Duplicate and data-quality rule	
Forecast category definitions	
Escalation trigger	
Review cadence and attendees	

Pipeline review agenda

- ☐ Changes in volume, conversion, velocity, value, and source quality
- ☐ New qualified opportunities and commitments
- ☐ Stalled, aging, high-risk, or unowned opportunities
- ☐ Forecast changes and evidence
- ☐ Loss reasons, objections, and customer learning
- ☐ Actions, owners, deadlines, and required executive decisions

11 / MEASUREMENT

Create the Funnel Dashboard

Select measures that reveal volume, quality, conversion, speed, economics, and customer value. Define each measure and its source before using it for decisions.

Metric	Definition	Source	Cadence	Target	Owner
Stage volume					
Stage conversion					
Funnel velocity					
Average deal / order value					
Win rate					
Customer acquisition cost					
Source quality					
Retention / expansion					

Diagnostic questions

- ☐ Where is the largest loss of qualified customer progress?
- ☐ Which sources produce customers with the strongest fit and economics?
- ☐ Which stage contains the oldest or least credible opportunities?
- ☐ Which objections or loss reasons point to an offer, message, proof, or process issue?
- ☐ What should be increased, improved, tested, paused, or stopped?

Single funnel metric requiring immediate attention

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12 / IMPROVEMENT

Build the 90-Day Funnel Plan

Prioritize the constraints that most limit qualified progress or revenue. Improve one defined part of the funnel at a time and measure the result.

Period	Constraint / focus	Priority actions	Owner	Success measure
Days 1-30				
Days 31-60				
Days 61-90				

Experiment register

Hypothesis	Change / test	Measure	Due	Result / decision

First funnel improvement to complete within 7 days

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13 / REFERENCE NOTES

Use Guidance

Build and review the funnel with marketing, sales, service, delivery, finance, and leadership. Update the model when the offer, audience, sales motion, evidence, or operating capacity changes.

Recommended working sequence

Step	Working action
01	Define one offer, customer, objective, and funnel path.
02	Establish observable stages and qualification standards.
03	Map demand sources, conversion assets, and follow-up.
04	Calculate volume, conversion, velocity, and economics.
05	Build the forecast and pipeline operating rules.
06	Create the dashboard and review cadence.
07	Run the 90-day improvement plan and update assumptions.

Quality check

- ☐ The funnel represents one defined offer and priority customer.
- ☐ Stages have clear entry, evidence, ownership, and exit conditions.
- ☐ Qualification protects customer fit and business economics.
- ☐ Demand sources are compared by quality and contribution.
- ☐ Follow-up provides value and has defined exit rules.
- ☐ Forecasts use explicit conversion and value assumptions.
- ☐ The 90-day plan targets the most important constraint.

Important: This worksheet provides general business-planning guidance. Confirm advertising, privacy, consent, consumer-protection, accessibility, contracting, tax, and other requirements for your business and markets.

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