

Marketing Funnel Planner

Build the funnel backward from the business goal, then define the message, offer, channel and KPI for every stage.

1. Start With the Business Goal

Primary business goal: _____

Customer / revenue target: _____

Primary conversion action: _____

Acceptable CPA / CPL if known: _____

Time period: _____

2. Work Backward

Planning input	Your number / assumption
Customer target	
Qualified lead -> customer close rate	
Qualified leads required	
Lead -> qualified lead rate	
Total leads required	
Visitor -> lead conversion rate	
Qualified traffic required	
Expected CPL / CPA	
Estimated budget requirement	

Use your own historical numbers when available. Assumptions are planning inputs, not guarantees.

3. Design Each Funnel Stage

Stage	Audience / mindset	Message / content	Offer / next action	KPI
ATTRACT				
ENGAGE				
NURTURE				
CONVERT				
RETAIN				
AMPLIFY				

4. Channel Map

Channel	Funnel role	Primary CTA	Tracking
SEO / organic search			
Google Ads			
Meta / social			
Email / SMS			
AI citations / referrals			
Website / landing pages			
CRM / sales follow-up			

5. Funnel Measurement Scorecard

Stage	Primary KPI	Current	Target	Problem / hypothesis	Next test
Awareness					
Engagement					
Consideration					
Conversion					
Loyalty					

6. Funnel Health Questions

- ☐ Are we attracting the right audience or simply generating traffic?
- ☐ Where is the largest measurable drop-off?
- ☐ Are leads qualified, or is the offer attracting the wrong people?
- ☐ Does every important stage have a clear next action?
- ☐ Are meaningful conversions tracked correctly?
- ☐ Are sales/CRM follow-ups fast and consistent?
- ☐ What happens after the first sale?
- ☐ Which channels assist conversions even when they are not the final click?
- ☐ What one bottleneck should we test next?

The funnel gives the business structure. The customer journey tells you how real people move through it.