

MODULE 8

FUNNELS


The Coach School

Workbook

ALLI WORTHINGTON

Funnels

An effective sales funnel moves people from passive visitors to paying clients. And it all starts with creating a delightful experience for prospective clients through interactions with your content, your business, and yourself.

Lesson Checklist:

- **Training 8.1 : Understanding the Magic of a Funnel**
- **Training 8.2 : Building Your Sales Funnel**

Understanding the Magic of a Funnel

Every business needs a well-organized sales funnel to succeed, and in this workbook you will learn how to make yours.

What is a "Sales Funnel?" Simply put, it's a plan that helps you get clients and make money. The formula we use in The Coach School consists of four tiers: **Awareness, Trust, Call** and **Close**.

Building a sales funnel will lead to bringing on new clients, helping clients with your expertise, and making money. If you take the time to work through every action step and question in this workbook, you'll be well on your way to having a funnel that builds your business dramatically!

► *The Four Tiers of a Sales Funnel*

A sales funnel is a carefully planned process that takes potential clients from passive visitors on your website or social media pages to actively engaged, paying customers.



► *Tier Overviews*

Now that you know what a sales funnel is, it's time to start building yours! Building this sales funnel is how you're going to increase your revenue today and create financial security for tomorrow.

CLOTHING BOUTIQUE EXAMPLE

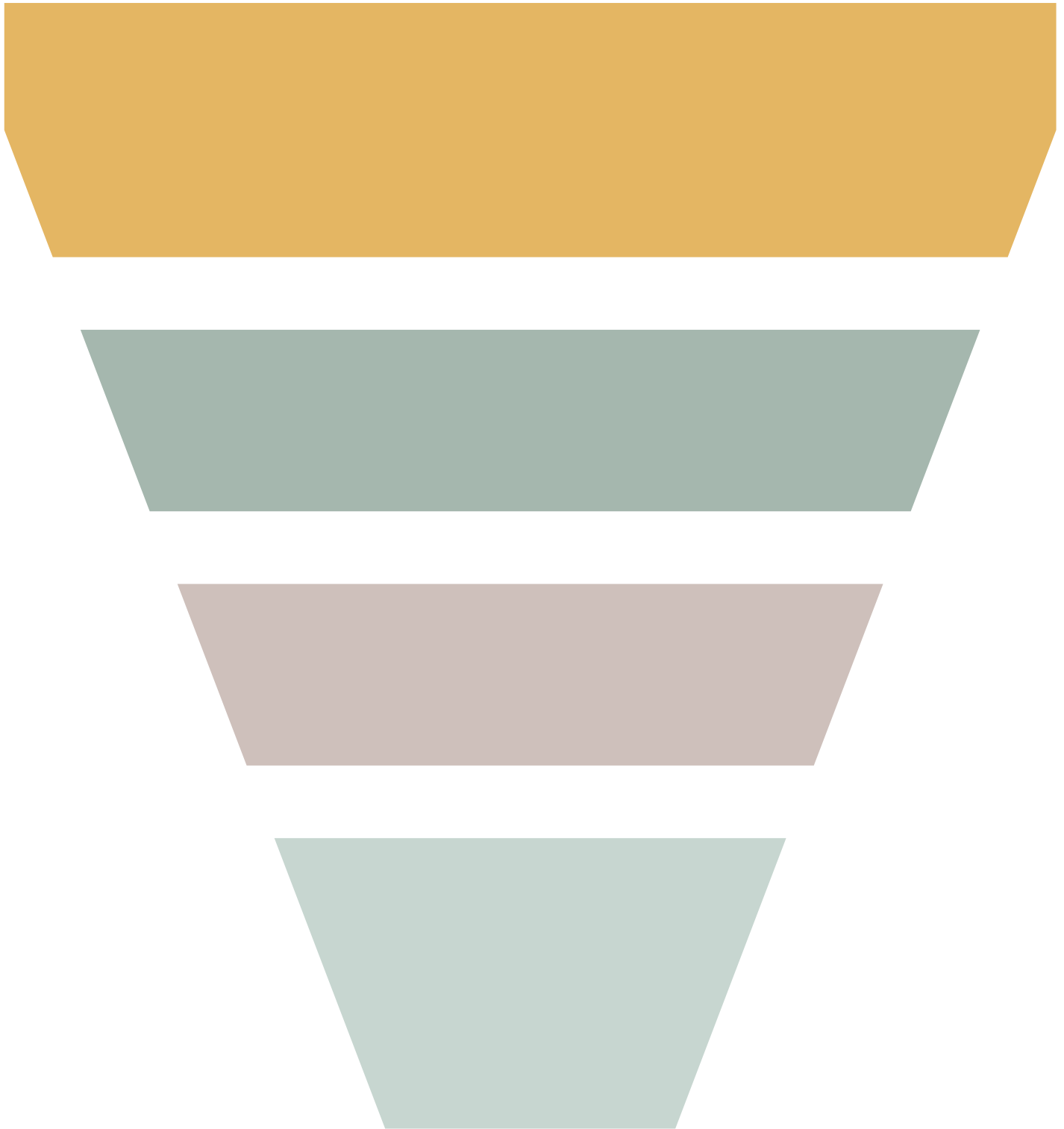
In Video 8.1, we used the example of a new clothing boutique to illustrate how the customer journey works through every tier of their sales funnel. It looked like this:



Take some time to outline the customer journey for your business using these four tiers of the sales funnel. Aim to build the best funnel you can, not simply improve what you're currently doing. (As you define this, consider what you think the customer journey should look like in your coaching business, even if it's different from what it looks like right now.)

On the diagram on the next page, write a short description of what each step in the customer journey will include for your sales funnel.

► *My Sales Funnel*



► *Tier Descriptions & Explanations*

Spend some time brainstorming more in-depth about each tier of your sales funnel. Add descriptors and explanations to each tier on the previous page. Take your time and write down anything that comes to mind. **Below is an example of what this step would look like on the boutique's sales funnel diagram.**

AWARENESS: Potential customers pass by. Clear signage, captivating window displays, sidewalk sales, open door, smells good, can see a friendly, smiling employee inside, window displays change to represent holidays, events, seasons.

TRUST: People come inside the store and like what they see. They realize this boutique is just their style and choose items they'd like to try on. We put together stunning outfits on mannequins and place each piece of the outfit nearby so they try it all on together, helpful staff starts a dressing room.

CALL: Some people try on items. They are wondering: Does it fit? Do I look good in it? Can I afford it? Staff make suggestions of accessories or other clothing items, staff is attentive to their needs, compliment customers when they come out of the dressing room.

CLOSE: A few people like what they see at the price offered and they make a purchase. We offer a coupon for another visit on the receipt, we say thank you, we let them know about upcoming sales, we invite them to tell their friends about us.

TRAINING 8.1: UNDERSTANDING THE MAGIC OF A FUNNEL

Sales funnels are not sales tubes. The difference between a tube and a funnel is a funnel gets narrower, while a tube is always the same width. In the process of the sales funnel, some people stop moving forward at each stage. This is normal and natural and every business experiences this.

What will you tell yourself when a potential client drops out of your funnel?

Well done! You've done a lot of great brainstorming today and have begun to form your sales funnel!

Building Your Sales Funnel

Your sales funnels can make or break your coaching business. So let's learn how to use them to "make it!"

► *Awareness*

In your own words, define the AWARENESS tier of the sales funnel.

Using the brainstorming you did in the Training 8.1 Workbook, create a simple outline of what this tier will look like in your business.

TRAINING 8.2: BUILDING YOUR SALES FUNNEL

Let's assess how you are doing at building awareness of your coaching business. On your worksheet, check the boxes next to each awareness-building activity you are currently engaged in.

- Social Media
- Website
- SEO
- Pinterest
- Paid Ads
- Collaboration
- Weekly Show
- Other _____

Look at the boxes you checked. Put a star next to the two awareness-building activities that you do best.

Great job! Your goal is to work towards doing each thing on this list as well as you do the starred item(s).

What do you think you need to do to achieve this?

Look at the boxes you left unchecked. Circle one or two of these that you'd like to begin or improve starting this week.

What steps will you take this week to put in place the first new awareness-building activity you circled?

TRAINING 8.2: BUILDING YOUR SALES FUNNEL

How much time will this take? When will you schedule it? Remember that what doesn't get scheduled doesn't get done.

If applicable, what steps will you take this week to put in place the second new awareness-building activity you circled?

How much time will this take? When will you schedule it?

Add the steps you are planning to take to your calendar right now.

Add a to-do in your calendar for one month from now to circle back to the awareness-building activity list and reassess how you're doing and what next steps you can take to continue to build awareness.

► *Trust*

In your own words, define the TRUST tier of the sales funnel.

Using the brainstorming you did in Training 8.1 Workbook, create a simple outline of what this tier will look like in your business.

How do you feel you are doing at building trust with potential clients and your audience as a whole?

TRAINING 8.2: BUILDING YOUR SALES FUNNEL

Next, evaluate how you are building trust with potential clients. **Beside each trust-building activity, write down how you think you are doing and one thing you can do to improve.**

POSTING HELPFUL CONTENT CONSISTENTLY ON SOCIAL MEDIA:

COMMUNICATING CONSISTENTLY WITH YOUR EMAIL LIST:

OTHER (PODCASTS, SPEAKING AT EVENTS, WRITING ARTICLES, ETC):

Based on your answers above, what 3 next steps do you need to take to improve on building trust with your audience and potential clients?

Make a plan of how you will take the first step here. Then schedule it in your calendar.

Make a plan of how you will take the second step here. Then schedule it in your calendar.

Make a plan of how you will take the third step here. Then schedule it in your calendar.

► *Call & Close*

In your own words, define the CALL tier of the sales funnel.

Using the brainstorming you did in Training 8.1 Workbook, create a simple outline of what this tier will look like in your business.

In your own words, define the CLOSE tier of the sales funnel.

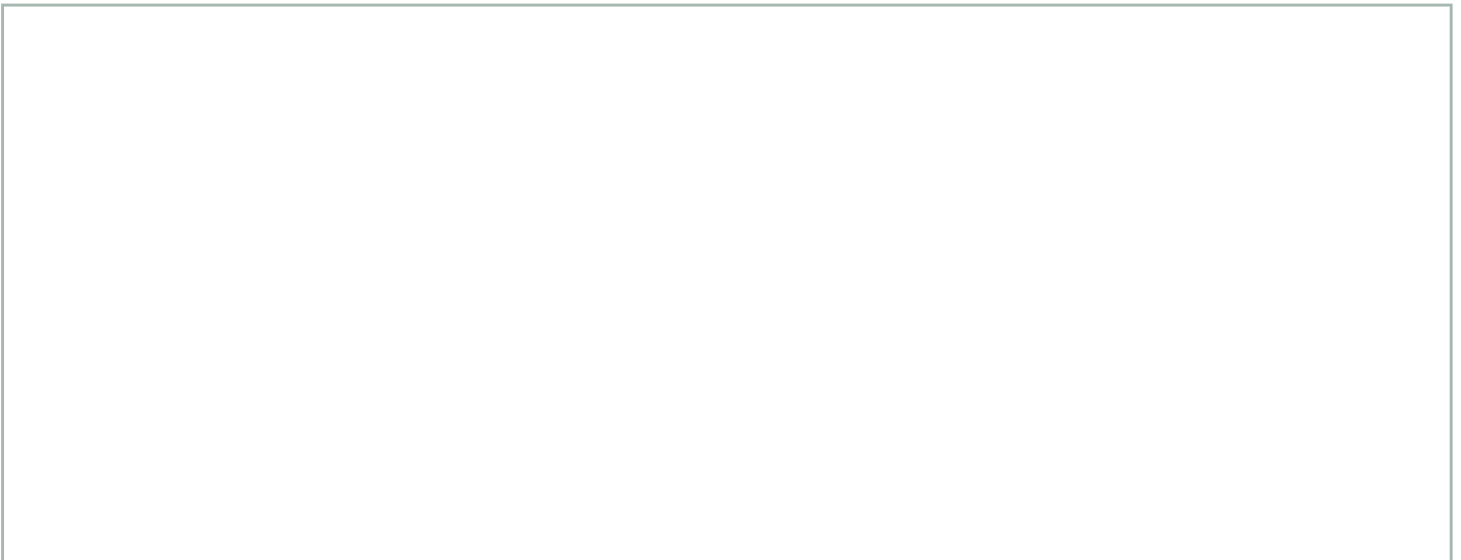
TRAINING 8.2: BUILDING YOUR SALES FUNNEL

Using the brainstorming you did in Training 8.1 Workbook, create a simple outline of what this tier will look like in your business.



We will take time to work through both the call and the close in the next module. For today, let's just take time to build a foundation for the work we will do next week.

Take time to consider your current discovery call model. Is it working? What do you like about it? What do you dislike?



Now consider your current strategy for closing a deal. Is it working? What do you like about it? What do you dislike?



When it's time to ask for the close on a deal, what is your internal dialogue like?



TRAINING 8.2: BUILDING YOUR SALES FUNNEL

Take time to respond to the internal dialogue you wrote above. **Speak truth to your feelings, speak courage to your fear, and speak positivity to your negativity!** Consider writing these on notecards that you keep in your eyesight when it's time to close a deal!

A large, empty rectangular box with a thin black border, intended for the user to write their responses to the internal dialogue exercise.

Remember, building this sales funnel is how we're going to increase your revenue today and create financial security for tomorrow. Be sure to follow through with the next steps of your sales funnel that you outlined above. The work you do today will create the future of your business!

Wrap Up

Great work finishing up this module! You're one step closer to booking clients and growing your business. Take a moment to reflect on all you learned, and then don't forget to visit the bonuses you unlocked.

My biggest takeaway from this module is . . .

The changes I made based on this module that will help my business be successful are . . .

Some things I learned in this module that I wasn't able to focus on right now but want to come back and work on later are . . .
