



How to Use This Worksheet

1. Map out how customers are currently finding your product or service.
2. Brainstorm compelling content to move prospects through your sales process.
3. Plan your post-purchase follow up with cross-sells, upsells, and surveys, to increase sales and get powerful data about why people buy from you.





Craft Content For Every Stage Of Your Marketing Funnel

Get a 50,000 foot view of your customer's buying journey.

PROBLEM RECOGNITION	What is my customer's #1 problem or pain that I can solve?	What information do my customers need to see at this stage?
	<i>Answer here ... Their business accountant is too expensive</i>	<i>None. In most cases, you don't want to convince people they have a problem.</i>
INFORMATION SEARCH	How do potential customers go about searching for a solution to this problem?	What information do my customers need to see at this stage?
	<i>Answer here ... Google "cloud accounting software", ask CEO friends what they use, read blog posts</i>	<i>Answer here ... "Why You Might Not Need Your Business Accountant", Cloud Accounting Software 101, An Introduction To XYZ Software</i>
EVALUATION OF ALTERNATIVES	What do potential customers look at when comparing me against competing solutions?	What information do my customers need to see at this stage?
	<i>Answer here ... our Fortune 500 clients listed on website for credibility, case studies, lead nurturing autoresponder, free trial offer, authority content marketing</i>	<i>Answer here ... Product comparison chart w/ competitors, Case studies, Industry white papers, money-back guarantee</i>
PURCHASE DECISION	What do potential customers experience before they decide to buy?	What information do my customers need to see at this stage?
	<i>Answer here ... online demo, Pricing page</i>	<i>Answer here ... information at checkout, "What's Next: How To Get Started", reassuring testimonials</i>





List out all the content
you now need to create and deploy:

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Post Purchase Follow Up

Map out an email series to onboard new customers and maximize Client Lifetime Value (CLV)

Email #	Type of email	Email plan	Added to email funnel?
1	Welcome	thank customer for purchase, outline what to expect	X
2	Case Study	include past client XYZ success story. Reassure decision to buy.	
3	Getting Started	video tutorial about how to get started	
4	FAQ	answer common customer questions about product or service	
5	Cross-Sell	Offer XYZ as a perfect complement to the product they bought	
6	Getting Started	video tutorial about how to get started	
7	Upsell	Offer XYZ as the "next level up" from the product they bought	
8	Survey	Elicit testimonials, get honest feedback, product ideas	

