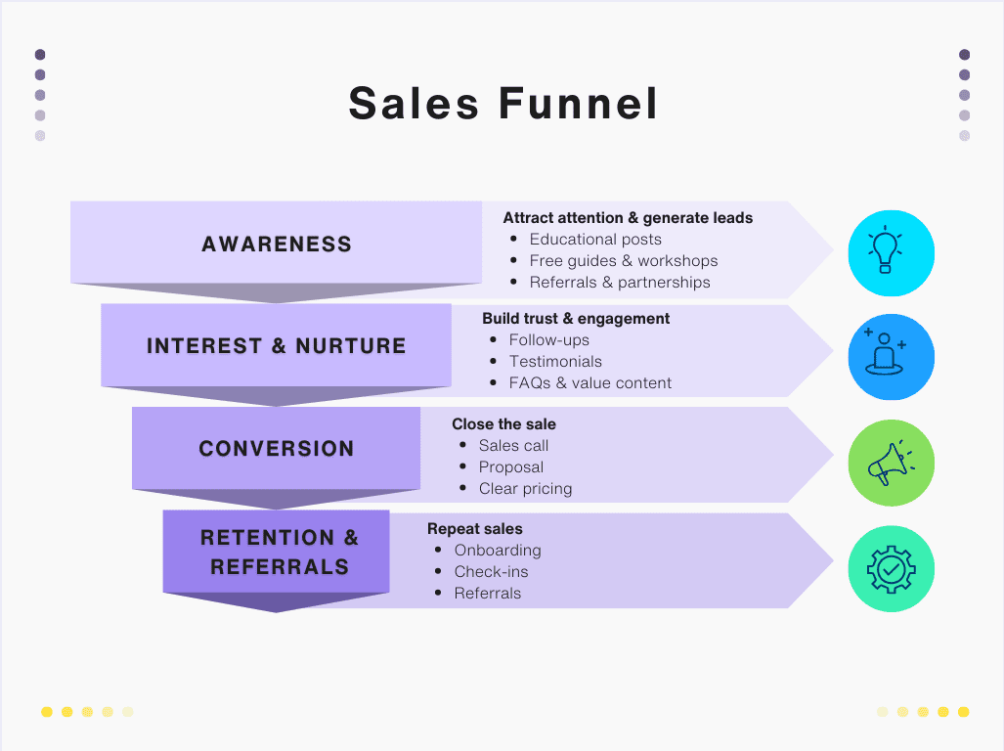
Template: Sales Funnel Template for Small Businesses

A simple system to turn strangers into loyal customers



Without a clear funnel, leads get missed and sales feel unpredictable. This template helps you know what to do at each stage and what action comes next. When you dreamBIG, a clear sales funnel helps transform scattered efforts into consistent and predictable business growth.

STAGE 1: AWARENESS

Goal: Attract the right people

What You Do:

☐ Share educational posts (tips, mistakes, how-to)
☐ Run polls/surveys to understand pain points
☐ Offer free guide/checklist/consultation
☐ Host workshop/webinar
☐ Use referrals & partnerships

Example Hooks:

- “Struggling with cash flow?”
- “3 mistakes small businesses make”

Output → Lead contact (DM, WhatsApp, Form submission)

STAGE 2: INTEREST & NURTURE

Goal: Build trust and stay connected

What You Do:

☐ Send follow-up message
☐ Share testimonials & case studies
☐ Answer FAQs & objections
☐ Send value emails or WhatsApp tips
☐ Share behind-the-scenes content

Example Messages:

- “Here’s how one client improved results”
- “Is this right for you?”

Output → Warm lead (engaging, asking questions)

STAGE 3: CONVERSION

Goal: Turn warm leads into paying customers

What You Do:

☐ Conduct structured sales call
☐ Share proposal/quotation
☐ Explain benefits clearly
☐ Present pricing transparently
☐ Share clear next steps

Example Close:

- “Based on your needs, this plan fits best.”
- “Let’s get you started this week.”

Output → Purchase / Sign-up

STAGE 4: RETENTION & REFERRALS

Goal: Repeat business + advocacy

What You Do:

☐ Smooth onboarding
☐ Regular check-ins
☐ Ask for feedback
☐ Offer upgrades or add-ons
☐ Request testimonial or referral

Example:

- “How has your experience been?”
- “Would you like support for the next step?”

Output → Repeat sales + Referrals

Quick Funnel Checklist

Before scaling, check:

☐ Do I know how people discover me?
☐ Do I follow up every lead?
☐ Is my offer clear and simple?
☐ Do I actively ask for the sale?
☐ Do I stay in touch after purchase?

Funnel Tips (Keep It Simple)

✔ Focus on one funnel first
✔ Automate follow-ups where possible
✔ Track where leads drop
✔ Keep communication human
✔ Guide every lead to the next step

Summary

A strong funnel makes sales predictable. When you define each stage clearly, no lead is lost, and every interaction moves forward.

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