

YOUR STRATEGIC SALES MODEL

KNOW

LIKE

TRUST

SIGNATURE

INVESTED

First, start with the messy

We'll create our messy brain dump of all the offerings in your business before organizing and adding them to your sales funnel above.

As you add services to your funnel, cross them off your list so you know they're in place.

Step 1

Use the box below to list every service, product, or freebie your business offers. If it's something you share with clients, it goes in the box.

Pro tip: don't edit or leave anything out during this exercise. It might feel messy, but throwing things out there is what's going to let us get a good view of what we're working with.



Step 2

Next, take a highlighter and highlight the services above that are most important to you. These are the ones that you want to be known for: the legacy that you want to leave. This is when to channel your inner Marie Kondo and focus on the services that bring you joy.

Pro tip: try to keep it to less than 5 services.

Step 3

Now that we have your most important services highlighted, these are what we'll build the rest of your funnel around. Flip to the sales model worksheet and write these services into the "Signature" section of your funnel.

Step 4

Now look through the brain dump box for anything that belongs in the "Invested" level of your funnel. These are services that you mostly reserve for returning or premium clients. They're the ones that require the most 1:1 time with you in order to complete.

Pro tip: if you don't have anything to add to this level, don't worry! We'll take a look at any gaps later.

Time for alignment

Now before we begin filling out the “Trust,” “Like,” and “Know” levels of our funnel, let’s take a look at what other paid services we offer. This is the part of the process when we decide which services are working for our business, and which services aren’t.

The goal here is to make sure that at every step in our funnel, your audience is naturally inclined to travel further down the road toward our signature offerings. For example, I used to offer single logo designs, but then I realized that if someone purchased a single logo design, they weren’t likely to come back to me for an entire brand identity (which is what I really wanted to offer people). So I decided to remove single logo designs from my services list.

Step 1

Take a look at what’s left in the brain dump box after removing your “Signature” and “Invested” offerings. Write any paid offerings that are left in the box below.



Step 2

Now we’re going to do a little bit of an audit. Take a look at the paid offerings in the box above and ask yourself if they help lead your customers further. If someone purchased these services, would the natural next step be to purchase your signature offering? If the answer is no, these services probably aren’t serving your business in the long term. These are the offerings we can consider removing from your business model.

Step 3

Finally, we're left with paid services that naturally lead toward your signature offering. Write these services into the "Trust" level of your funnel.

Step 4

For each of the *free* offerings left in the brain dump box, ask yourself again if the next step after receiving them would naturally be to purchase one of your "Trust" offerings. If the answer is no, those are the freebies we can remove; if the answer is yes, add those freebies to the "Like" level of your funnel.

Step 5

And finally, we end with the "Know" level. This level is for all of our social media content, advertisements, and anything else that first introduces someone to our brand. List any marketing channels you use (like Pinterest, Instagram, Email Marketing, etc.) in the "Know" level of your funnel.

Congratulations! You have the basic outline of your first sales funnel!