

Marketing Funnels — Workbook

This workbook turns the course into reps you run on a real business. Each section mirrors one course module with hands-on exercises, fill-in worksheets, and checklists you apply to your own funnel. Pick one offer you actually sell and carry it through every section, and you will finish with a mapped funnel, stage-by-stage conversion numbers, a lead magnet and nurture sequence, a measured GA4 view, and a back-end loop for upsells, retention, and referral.

Funnel Foundations and the Pirate-Metrics Spine

Map your funnel onto the AARRR stages and compute the three numbers — conversion rate, CAC, and LTV — that tell you whether the machine pays for itself.

Worksheet: Map Your Funnel to the AARRR Stages

Write down what currently happens at each AARRR stage for your business, plus the number of people at that stage in the last 30 days. Use real figures from your analytics and sales records, not guesses.

Acquisition: main channels bringing traffic + total visitors last 30 days

Activation: the first value action (lead/signup) + count last 30 days

Revenue: the macro conversion (purchase/paid trial) + count last 30 days

Retention: how a customer returns/repeats + % still active after 90 days

Referral: how customers refer others + % of new customers from referral

Exercise: Compute Stage-by-Stage Conversion Rates

Using your AARRR numbers above, calculate the conversion rate between each consecutive stage (outcomes divided by opportunities). The lowest rate is your headline leak for the rest of the workbook.

- Visitor-to-lead rate = leads divided by visitors (express as a percentage).

- Lead-to-customer rate = customers divided by leads (express as a percentage).

- Repeat-purchase rate = repeat buyers divided by total buyers.

- Circle the lowest of these three rates — this is your primary fix target.

Worksheet: Calculate CAC, LTV, and the Master Ratio

Pull your spend and revenue numbers and work through the unit economics. If the LTV-to-CAC ratio is below 3-to-1, note it — you will fix conversion or retention before scaling spend.

Total sales + marketing spend last period and new customers it produced

CAC = spend divided by new customers

Average order value (AOV) = revenue divided by orders

Purchase frequency and average customer lifespan

LTV = AOV x frequency x lifespan x gross margin, and the LTV-to-CAC ratio

Checklist: Foundations Gut Check

- I have written what happens at all five AARRR stages, not just acquisition and revenue.
- I have a real conversion rate for each step, not only the final sale.
- I know my CAC and my LTV as actual numbers.
- I have identified my single leakiest stage as the priority to fix.
- I have confirmed whether my LTV-to-CAC ratio is healthy (around 3-to-1 or better).

Top of Funnel: Attracting and Capturing Attention

Sort your content by buyer intent, design a lead magnet that earns the email, and build a focused landing page fed by deliberate traffic sources.

Exercise: Audit and Tag Your Content by Intent

List your existing content and offers and tag each one TOFU, MOFU, or BOFU. The gap you find — usually a missing MOFU capture step — is what the rest of this section fixes.

- List every piece of content/offer you currently have and tag each TOFU, MOFU, or BOFU.

- Count how many you have at each level — where is the biggest gap?

- Confirm you have at least one capture point (lead magnet) sitting at MOFU.

- Note one new piece you need to create to close the largest gap.

Worksheet: Design Your Lead Magnet

Specify a lead magnet that solves one narrow problem fast and attracts the same people who would buy your paid offer. Aim for a format consumable in under 10 minutes.

The one specific problem this magnet solves (narrow, not broad)

Format (checklist / template / calculator / mini email course / sample)

The quick win the lead gets within minutes of receiving it

How it aligns with the paid offer it should lead toward

Target opt-in conversion rate for its landing page (aim 20-40%)

Worksheet: Draft Your Landing Page and Traffic Plan

Write the core elements of the capture page and choose the two channels (one paid, one organic) that will feed it. Ensure message match with whatever ad or link drives the click.

Headline (single biggest benefit, in the visitor's words)

Subheadline (who it is for + what they get)

Three to five benefit bullets (outcomes, not features)

Social proof element + the single call-to-action button text

One paid channel + one organic channel feeding the page, with UTM tags planned

Checklist: Top-of-Funnel Readiness

- Every content piece is tagged TOFU, MOFU, or BOFU and the biggest gap is identified.
- My lead magnet solves one narrow problem and delivers a fast quick win.
- My landing page has one ask and no competing navigation links.
- The landing page headline matches the promise of the ad/link that drives traffic.
- I have chosen one paid and one organic channel and tagged links with UTMs.

Middle and Bottom: Nurturing and Converting

Write a welcome nurture sequence, build a value ladder with no missing rungs, and structure a sales page with ethical conversion triggers.

Exercise: Write Your 5-Email Welcome Sequence

Draft the subject line and core message for each of the five welcome emails using the proven structure. Read the whole sequence as one new lead would experience it across a week.

- Email 1 (deliver magnet + set expectations): subject + key message.

- Email 2 (origin story / why): subject + key message.

- Email 3 (pure-value teaching): subject + the one useful thing taught.

- Email 4 (offer via success story): subject + which customer story.

- Email 5 (direct, time-bound offer): subject + the call to action and reason to act now.

Worksheet: Build Your Value Ladder

Place your current offers on the ladder rungs and find the gaps. If you jump from a free magnet straight to a high-priced offer, design a mid-priced rung and an entry tripwire to bridge it.

Lead magnet (free): what it is

Tripwire / entry offer (approx 7-47): what it is, or 'GAP — design one'

Core offer (mid price): what it is

Profit maximiser (high price): what it is, or 'GAP'

Continuity (recurring): what it is, or 'GAP'

Worksheet: Outline Your Sales Page (PAS)

Fill the Problem-Agitate-Solution structure for your core offer, then list the proof and the one ethical urgency trigger you can use honestly.

Hook/headline (desired outcome or painful problem in their words)

Problem + agitation (the pain and what leaving it unsolved costs)

Solution + offer stack (what is included, itemised)

Proof elements (testimonials / case studies / data)

One REAL urgency trigger + the guarantee (risk reversal) you offer

Checklist: Conversion Readiness

- My welcome sequence is written end-to-end before being turned on.
- My value ladder has no cliff — there is a reasonable next step at every price level.
- My sales page follows Problem-Agitate-Solution and handles real objections in an FAQ.
- Every urgency or scarcity claim on my page is genuinely true.
- I offer a clear guarantee that shifts risk away from the buyer.

Back of Funnel, Measurement, and Loops

Instrument the funnel in GA4, add upsells that raise order value, and build retention and referral loops that refill the top of the funnel.

Worksheet: Define Your GA4 Funnel Events

Map each funnel stage to a GA4 event and confirm it fires correctly in DebugView before trusting any report. List the events in the order a customer triggers them.

Acquisition event (e.g. page_view) + UTM source captured

Activation event (e.g. generate_lead) — verified in DebugView? Y/N

Consideration event (e.g. view_sales_page / begin_checkout)

Revenue event (purchase) with value + currency — verified? Y/N

The funnel-exploration steps in order + which step shows the steepest drop

Exercise: Design Your Back-End Offers

Plan the upsell, cross-sell, and order bump for your core offer, and the moment each is presented. Every back-end offer must genuinely help the customer use what they just bought.

- Order bump (checkout checkbox add-on): what is it and why is it relevant?

- One-time upsell after purchase: the bigger/better version offered in one click.

- Cross-sell: the complementary product and when it is offered.

- Estimate the AOV lift if a reasonable share of buyers take the bump and upsell.

Worksheet: Build the Retention and Referral Loop

Specify how you keep customers and how you turn them into an acquisition channel. Choose the trigger moment for the referral ask when customer goodwill is highest.

Onboarding step that gets a new customer to first success fast

Engagement cadence that keeps you top of mind (email/community/updates)

Win-back trigger for lapsed customers (when + the offer)

Referral trigger moment (right after which customer win?)

Double-sided referral incentive (reward for referrer + for the friend) and how it is tracked

Checklist: Loop and Measurement Readiness

- Every AARRR stage maps to a GA4 event and each event is verified in DebugView.
- I have a live funnel exploration showing drop-off at each step.
- I have at least one back-end offer (bump, upsell, or cross-sell) that is genuinely relevant.
- I have an onboarding and a win-back step to protect retention.
- My referral offer is double-sided, low-friction, and tracked as its own event.

Your Action Plan

1. Pick one offer and map its full funnel onto the five AARRR stages with last-30-days numbers.
2. Compute conversion rate at each step plus CAC and LTV, and circle your single leakiest stage.
3. Create or sharpen one specific lead magnet that delivers a quick win in under 10 minutes.
4. Build a single-purpose landing page for the magnet with message match and one clear call to action.
5. Choose one paid and one organic traffic channel and tag every link with UTM parameters.
6. Write the full 5-email welcome nurture sequence and turn it on for new leads.
7. Map your offers onto the value ladder and add a missing rung (tripwire or mid-priced offer) if there is a cliff.
8. Draft your core-offer sales page using Problem-Agitate-Solution with proof, an FAQ, and one honest urgency trigger.
9. Instrument the funnel in GA4: define events for each stage, verify them in DebugView, and build a funnel exploration.
10. Add one back-end offer (order bump or upsell), one retention step (onboarding or win-back), and a double-sided referral loop, then review the GA4 numbers monthly and fix the next leak.

