

Funnel Vision: Practical Research and Planning Checklist

- ☐ **Do I know how to:**
 - ☐ Put my customer first
 - ☐ Instinctively know what is going to thrill them
- ☐ **Have I researched:**
 - ☐ What they're complaining about
 - ☐ What they express wishes for
 - ☐ What they need
 - ☐ What they buy
 - ☐ Other: _____
- ☐ **Do I know my typical perfect customer's:**
 - ☐ Gender
 - ☐ Age
 - ☐ Marital status
 - ☐ Number of children/no children
 - ☐ Annual income
 - ☐ Education level attained
 - ☐ Favorite TV shows, magazines, websites, movies
 - ☐ Pets
 - ☐ Other unique details _____
- ☐ **Have I considered:**
 - ☐ Timing
 - ☐ Price point

- ☐ Ease of purchase
- ☐ **Do I understand about:**
 - ☐ The importance of a strong sign up incentive
 - ☐ The importance of creating a smooth "flow" through my funnel
 - ☐ Having a new sales funnel ready and waiting, when my customer is almost finished with my first sales funnel
 - ☐ The importance of being affiliate-ready
 - ☐ The joint venture partner potential in my best clients
 - ☐ The importance of repeat buyers
 - ☐ Other _____

Planning My Sales Funnel

- ☐ Do I understand the relationship between planning and research?
- ☐ Do I know that sales funnel business plans can be flexible -- so I shouldn't be afraid to brainstorm and try one out
- ☐ Do I understand that the way to make "tweaks" less costly is to really do my homework, before putting plans into practice?
- ☐ Have I made every effort to accurately pinpoint each step of my customer's journey through my funnel?
- ☐ Have I allowed for regular (but hopefully small) customer exits, at intervals along my funnel? Have I made plans to turn these to good and maximize them by providing:
 - ☐ Affiliate related products that might please him more, on his way out the door?
 - ☐ Pointed out to him that he can become an affiliate -- even if my product wasn't for him?
 - ☐ Made him feel his exit was a pleasant experience -- one that actually has him thanking me?

Doing My Homework

- ☐ **Have I done all the preparation and research I can by:**
 - ☐ Adding a poll?
 - ☐ Surveying my potential customers?
- ☐ **Have I:**
 - ☐ Signed up with [Survey Monkey](#), or another Survey service of my choice?
 - ☐ Written my first survey?
 - ☐ Set up my first, easy [Facebook Poll](#)?
- ☐ **Have I:**
 - ☐ Considered adding premium features to my poll apps or survey services?
 - ☐ Maximized my polls and surveys by taking advantage of available options?
 - ☐ Included a "vote" option in my quick poll?
 - ☐ Kept surveys at a maximum of ten questions or less?
 - ☐ Included at least one open-ended question to elicit feedback?
 - ☐ Made effective use of easy radio buttons or multiple-choice options?
- ☐ **Do I understand the difference between polls and surveys?**
- ☐ **In my surveys and communications, have I:**
 - ☐ Focused on my customer's needs and wishes -- not mine?
 - ☐ Made my survey easy?
 - ☐ Kept it clear?
 - ☐ Kept the focus simple?
 - ☐ Made it fun?

- ☐ Included a call to action!
- ☐ **Have I asked myself:**
 - ☐ What do my potential customers want to talk about **right now**?
 - ☐ What will they be happy to **pay for**, further down the funnel?
 - ☐ Is this a group that **spends money** on information or products?
- ☐ **Have I:**
 - ☐ Read niche or industry authority blogs and online magazines?
 - ☐ Checked YouTube to see what's already been covered that my niche really wants (and what these videos have missed)
 - ☐ Checked blogs and Facebook pages in my niche to see what people are saying in the comments
 - ☐ Looked for complaints in comments and forums to identify gaps?
 - ☐ Ran my keyword plus the word "complaints" in Google's search box?
 - ☐ Analyzed my competition and asked myself:
 - ☐ What are they doing?
 - ☐ What have they missed?
 - ☐ Can I improve on it?
 - ☐ Paid attention to my niche or industry "buzz"? What everyone is talking about on Social networks? Television?
 - ☐ Studied magazines -- both "general" ones (to see what's being buzzed about or what is trending) and those specific to my niche?
 - ☐ Taken note of the headlines and subheads on the cover for big pointers at what's being talked about?
 - ☐ Been specific: Instead of asking open-ended, vague things like: "What do need the most?" have I offered them **specific** options and alternatives, after doing my homework?
 - ☐ Have I "just asked"?