



# Marketing Funnel Template

A step-by-step guide to build  
an effective (and authentic!)  
funnel **that converts.**



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CFP®

## MARKETING FUNNEL

# Activities



Acknowledging where a specific marketing activity fits within the funnel will allow you to set proper expectations and measure success. It will also allow you to identify gaps in your marketing efforts and ensure you have created

a clear, effective path for conversion. To help get you started, here are some examples of different activities at each stage of the marketing funnel. **Choose one activity from each stage to build your first marketing funnel.**

### AWARENESS

**Where does your ideal client first encounter you, your brand, your firm, your services?**

- Viral Campaign
- Trade Show/Conference
- Online Directory
- In-person Networking
- Referrals
- Paid Advertising
- SEO
- Cold Outreach
- Direct Mail
- Media Relations

### ENGAGEMENT

**What will you do to build trust, show your expertise, and keep your ideal client engaged?**

- Podcast
- Blog
- YouTube/Video
- Webinars/Workshops
- Public Speaking
- Teaching Classes
- Guest Writing
- Guest Interviews
- COI Nurturing Process
- Email Newsletter

### CONVERSION

**What is your process for converting engaged prospects into lifetime clients?**

- Free Consultation/Analysis
- Intro Call/Meeting
- Presentation/Proposal
- Multi-Step Sales Process

**Awareness**  
Top

**Engagement**  
Middle

**Conversion**  
Bottom

MARKETING FUNNEL

# Example #1



AWARENESS

1

**SEO**  
("Best Retirement Podcast")

ENGAGEMENT

2

**Weekly Podcast for High Net Worth Retirement Savers**

CONVERSION

3

**The**  
**ULTIMATE SALES PROCESS**  
for financial advisors

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# Example #2



AWARENESS

1

**Cold LinkedIn Direct Message to  
Qualcomm Executives**

ENGAGEMENT

2

**Monthly Educational Webinar on  
Optimizing Qualcomm Benefits**

CONVERSION

3

**The  
ULTIMATE SALES PROCESS**  
for financial advisors

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# Example #3



AWARENESS

1

**Facebook Ads to High Net Worth Retirement Savers Over Age 50**

ENGAGEMENT

2

**Free Medicare IRMAA E-Book**



**Email Newsletter**

CONVERSION

3

**The  
ULTIMATE SALES PROCESS**  
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EXERCISES

# Your Marketing Funnel #1

① How Will You Create **Awareness**?

② How Will You **Engage**?

③ How Will You **Convert**?

AWARENESS

ENGAGEMENT

CONVERSION

1

2

3

EXERCISES

# Your Marketing Funnel #2

① How Will You Create **Awareness**?

② How Will You **Engage**?

③ How Will You **Convert**?

AWARENESS

ENGAGEMENT

CONVERSION

1

2

3

EXERCISES

# Your Marketing Funnel #3

① How Will You Create **Awareness**?

② How Will You **Engage**?

③ How Will You **Convert**?

AWARENESS

ENGAGEMENT

CONVERSION

1

2

3





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**Webinars  
and  
Workshops**



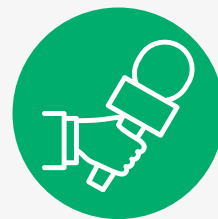
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