



Optimizing Your Sales Funnel

How to build or uplevel the sales system behind your signature offer

You know that your sales funnel can use some work.

Maybe it was working but it's stalled a bit and you're not sure what to do.

Or maybe you set up a simple funnel a few months ago and haven't touched it since.

Or maybe you're worried that it may not be set up exactly right.

Or maybe you still need to create a funnel.

Wherever you are at in your funnel journey (and we'll figure out exactly where that is in Part 1), you've landed in the right place!

Hi, I'm Kate - the owner of Kate Sullivan Agency. And over the past 5 years my team and I have built 100+ funnels for business owners at every stage. Sales funnels that have grown their leads, and their revenue, without adding more to your plate. And now we want to take everything that we know and give that knowledge to you.

I've written this guide to give you all the tools to build your funnel, layer in the "uplevels"... what I like to call the more money makers and show you the data and systems that make it all work.

My goal is to meet you where you are at with sales funnels - beginner or experienced - and give you everything you need to hit your sales goals by building a funnel that automates as much of the sales process as you allow.

This document is a bit of a "choose your own adventure". We'll start in Part 01 to really determine where you need the most support and then based on your answer, I'll guide you to the section that would best support that

Now it's up to you to get it going! (Or is it? Check out the last page if that sentence freaked you out).

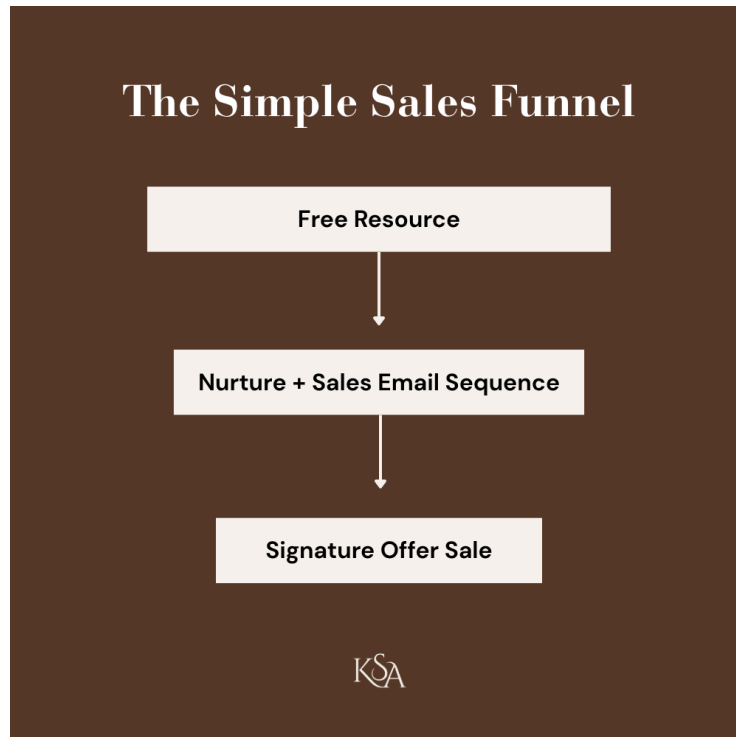
XO,
Kate

Part 01: Let's figure out what stage of funnel building you are at

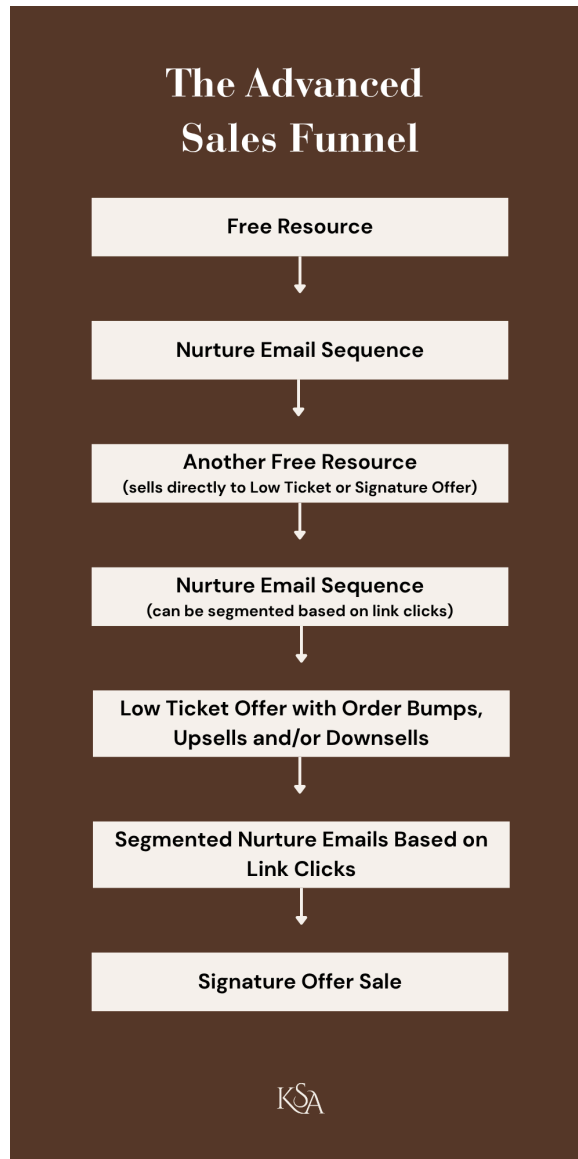
If you're anything like me, you need to see something for it to actually make sense. So that's where we're going to start.

When I think of sales funnels I put them in 2 buckets: Simple and Advanced.

A Simple funnel looks something like this:



An Advanced funnel looks something like this:



Now, the most important part of this section: **Based on these visuals, where do you need help?**

- ☐ Are you new to business and want to get started with a simple funnel? Then jump to Part 2
- ☐ Do you have a simple funnel set up and you are ready to really uplevel it? Then jump to Part 3
- ☐ Do you have an advanced funnel set up but you're not feeling super confident about it? Then jump to Part 3
- ☐ Are you feeling super confused by all of the funnel systems? Then jump to Part 4

And if all of this is feeling way too overwhelming, that's ok too! That's why I have a Done-For-You Funnel Build and you can [learn more about it here](#).

Part 02: Let's Build A Sales Funnel

Step 1: Build your entry point (a free resource).

Someone finds your website, your instagram, your substack. They like your vibe, they find your content to be exactly what they need. But now what? How do we get them into your world (aka on to your email list so they can start hearing more from you)?

THAT, my friend, is your entry point.

Now, there are a lot of different options here:

- A checklist
- A mini-guide
- A workshop (live or evergreen)
- A quiz
- A template or planner
- A mini-podcast series

Basically we are trying to give them a quick win with you first. A way that they can see the value you bring, without you having to show up personally (unless it's a live workshop... more on that later).

So, how do you pick which resource you should put out there? Here's are some guidelines:

If your audience buys on quick wins and momentum → build a checklist or mini-guide

If your audience needs to see themselves in the problem first → build a quiz

If your audience is ready to act but needs some structure → build a template or planner

If your audience buys on trust and expertise → build a workshop or mini-podcast series

Next Step: Create that entry point! Open up canva and create the check-list or guide, start a google sheets and map out a quiz, build a template or planner in notion, break out the mic and start recording a workshop or podcast series

Just start. You need to take advantage of momentum and curiosity here. You can always go back and make edits later. Something I'm always reminding my clients of... Nothing is set in stone!

By the end of this step, you will have a free resource created!

Step 2. Create The Form

You have your free resource! Amazing!

Now we need to set up a form where people can give you their name and email in exchange for that resource.

Let's start with *where* you are going to build this.

This happens in your email marketing platform. If you don't have one of those, this is the time to get one. Here are the options I like:

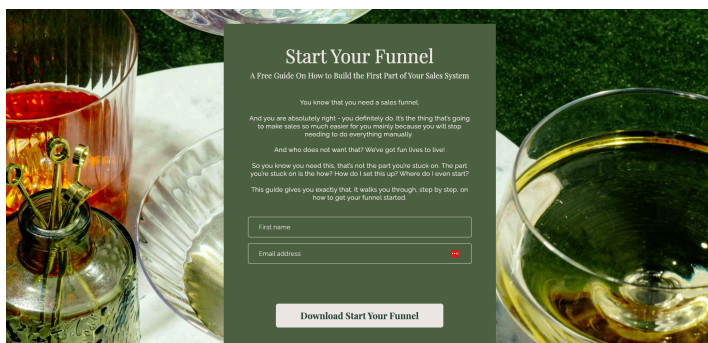
- Flodesk
- Kit
- Mailchimp

Ok, Kate, I have one of those - now what?

In that platform, you are going to find forms and boom, start making one! You'll want to make sure you include a short description about the free resource as well as capture the leads name + email.

Pro-Tip: Make sure you have the sign ups added to a tag or segment so you can reach out to just that group if you need to in the future

Here are some examples of opt-in forms in case you're more of a visual person :)



THE CALM
LAUNCH
CHECKLIST

Get Organized, Eliminate Chaos, and Set Yourself Up for a Smooth, Successful Launch.

Even if it's your first launch. Even if you're overwhelmed with time. Even if you've only ever known scrappy launches.

Launching a program or offer takes more than great ideas. It takes preparation, strategy, and the right systems in place. The Calm Launch Checklist has the key systems and structure I use that support the dozens of calm launches I've been apart of.

Imagine a launch where you can stay focused on what matters most, connecting with your audience, serving your clients, and actually enjoying the process.

Make Your Next Launch The Calmest and Most Successful One Yet.

Your name

Your email

DOWNLOAD YOUR CHECKLIST

Next step: Now you're going to set up an automation (we're still in your email marketing platform here) that once someone submits the form, you automatically send them an email that delivers to free resource.

So, pause here and take a moment to write that email. It can be super short and sweet, your lead really just wants the free resource. Save the about you and your business until step 3!

In that email, you will also want to include a link to the free resources. A lot of people will use a shareable google drive link for this or some email marketing platforms allow you to upload the resource directly into the email.

By the end of this step, you will have a form that leads can opt-in to that captures their email address and in exchange, they receive an email with the free resource!

Step 3: Nurture the heck out of that lead

This is NOT the step where everyday you go in and email that lead some version of a templated email. We are automating that sh*t.

But before we get to automations, we have to write those emails. And here is where I strongly urge you to actually write these yourself (or with a copywriter) and not turn to chatGPT or Claude for the final version.

Why? Because it's super important that these emails feel exactly like YOU! Maybe not so surprisingly... people decide that they want to work with you, to buy from you, because they like you and see value in the work that you are providing the. You know whats going to not sound like you? AI generated emails.

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But let's not get crazy here, you still need a place to start with these emails. And that is something AI could help you with... or you can just keep reading because I have an outline for you!

So, your action item here is to write 3-6 emails that nurture everyone who opt-in to your free resource and eventually sells them your signature offer.

Here what that email sequence can look like:

Email 1:

This email is a great place to welcome the client warmly into your space and let them know a little bit about you/your business

Email 2:

This email can share a story about a client you served who was dealing with the same issue/painpoint that this opt-in is around and how this helped them. You can also start to warm them up here for the low-ticket offer... phrases like "So stay tuned, over the next few days I will share exactly how..."

Email 3:

This email can start to gently share your signature offer. This is a great place to start with a personal story or a client story that leads them to the offer as the solution

Email 4:

This email is all about the offer - what it is, why they need it, the transformation that will happen when they buy in.

Email 5:

This email acknowledges concerns that typically come up for your clients before they purchase your offer. And speaks to why this offer is still needed

Email 6:

This email would be sent a few days after Email 5 as a last push for your offer.

Next step: Now that those emails are written, it's time to add them as an automation to your email marketing platform.

So head back into your email marketing platform and go to the automation you set up that delivers your welcome email. This is where you will add in the 3-6 emails you wrote for your nurture sequence.

Pro Tip: Make sure you all in a time delay between each email. I like to space them out so they are a day or 2 apart.

That's it! Your funnel is now created so that when someone opt-in to get your free resource, they will be nurtured into the next step - your signature offer! This is also a good point to test that funnel before you move on to step 4.

Step 4: Market your free resource!

Congratulations on having a funnel fully set up! Now it's time to talk about it everywhere so people actually start seeing + opting in to it.

While marketing is far from my expertise, here are the basic places I encourage my clients to have their free resource "posted":

- On your website:
 - in the menu bar
 - as a pop up
 - on the homepage
 - As an announcement banner
- In your email signature
- On your social media platforms:
 - Post about it regularly - on the grid and in your stories!
 - Update your link in bio to include this
- Anytime you are on a podcast or public speaking, this is a great call-to-action

A Helpful Checklist:

I went over a lot in part 1, so I figured a checklist of the items to accomplish in setting up the beginning of your sales funnel would be helpful. Plus there is just something so satisfying about crossing something off a list.

Step 1: Choose Your Entry Point

- ☐ Decide which resource type fits your audience (checklist, mini-guide, workshop, quiz, template/planner, or mini-podcast series)
- ☐ Create the resource (Canva for a checklist/guide, Google Sheets to map a quiz, Notion for a template/planner, or record for a workshop/podcast)
- ☐ If building a live workshop: pick a date, time, and delivery format (Google Meet, Zoom, in person) and write the messaging + description

Step 2: Build the Entry Point

- ☐ Confirm your email marketing platform. Set one up if you don't have it (my recommendations are Flodesk, Kit, or Mailchimp).

- ☐ Build the opt-in form, including a short description of the resource and fields for name + email
- ☐ Tag or segment new sign-ups so you can reach this group separately later
- ☐ Write the short delivery email that includes a link to the free resource
- ☐ Set up the automation that delivers the resource immediately after form submission

Step 3: Nurture the Lead

- ☐ Write 3-6 nurturing emails
- ☐ Add all emails into the automation sequence, following the welcome email
- ☐ Set time delays between each email (1–2 days apart)
- ☐ Test the full funnel end-to-end

Step 4: Market the Free Resource

- ☐ Add to website menu bar
- ☐ Add as a website pop-up
- ☐ Add to homepage
- ☐ Add as an announcement banner
- ☐ Add to email signature
- ☐ Post about it regularly on the grid
- ☐ Post about it regularly in stories
- ☐ Update link in bio
- ☐ Mention it as a CTA on podcasts/public speaking appearances

Part 03: Let's Uplevel Your Sales Funnel

Welcome to the part of this guide where we are really kicking things up a notch (anyone else always think of Emeril Lagasse with this phrase... just me?).

You have a simple funnel built, but you are ready to add more to it. To segment the leads coming into it to make sure you're sending them to the best offer for them. To make sure you're tracking all of the correct data. To get it meta-ads ready. I'll pause here because I'm about to go into all of the ways to do this below.

And I want to add a quick caveat to this section - by no means do you have to have ALL of this set up to have a successful sales funnel. You can take or leave as much of these items based on your business and offer - but I want you to have all of the options so you can make the best decision for you.

Let's dive in. Below are the items to make sure you implement into your sales funnel, the *more money makers*, in order to really maximize its impact to your business.

Tracking & Data

☐ *Google Analytics Events*

Most of the advanced funnels I look at have Google Analytics installed, but they are only tracking one event: the purchase. Which means you only know when revenue is happening. You don't have visibility into where people are dropping off. So every stay that a lead can take - like signing up for a workshop, clicking through to a sales page, or abandoning a checkout should be its own key event in Google Analytics

☐ *UTM Parameters*

Your funnel is going to have traffic from multiple places - instagram, email, podcast episodes and UTMs are what you can use to decipher which platform a lead came from - either Thursday's podcast episode or Monday's email

☐ *Meta Pixel*

If you are planning to run an instagram or facebook ad for your anything in your business, including any piece of the sales funnel, a meta pixel needs to be set up and added behind the scenes to every page in your sales funnel

☐ *Conversion Events*

Not to be confused with Google Analytics Events, Conversion Events are within your ad platform and they are used to optimize who the platform shows your ads to. These are usually linked to every thank-you page in your sales funnel and tell your ads platform *what happened*, not just that someone showed up

Behavioral Automations & Segments

☐ *Email Sequences Triggered by Link Clicks*

Setting up an email sequence is great, but what takes it to the next level (and increases your sales) is mapping it out so that if someone clicks the link to a checkout page, but doesn't purchase, you can nurture them via email in a more specific way than someone who did not click the link

☐ *Abandoned Cart Sequence*

This is a bit different than sequences by link clicks because an abandoned cart is only triggered when either a past client goes to buy, then stops or a new client begins to fill out the checkout form but doesn't follow through. Meaning these leads were SO close to purchase and you can nurture them in a different way than anyone else on your list

☐ *Re-Engagement Sequences For Cold/Unengaged Subscribers*

Unfortunately, it will happen. Some of your email subscribers will stop opening and engaging with your emails. And running a re-engagement sequence to these leads is a great way to get that door open again.

Offer Architecture

☐ *Order Bumps*

I recently had a client launch a low ticket offer for \$39. We added a \$17 dollar order bump, a guide to accompany the offer that the client could easily add to their cart during checkout. 40% of people who purchased the offer also purchased the order bump - an extra \$17,000 for every 1,000 sales. That is the power of an order bump.

☐ *Order Upsells*

Similar to order bumps, this is a piece of the funnel where when set up correctly it will bring so much more money into your business than just the offer amount. Different than an order bump though, this upsell is not shown to the client until after checkout.

☐ *Order Downsell*

So many clients that I work with understand the concept of an upsell, and may even have one in place. But what often gets left on the table is the downsell. If someone says no, to the offer or the downsell, they are simply accepting that. And that's where the downsell comes in. If someone says no to a \$500 offer, it's a place to turn that sale into \$150 instead of \$0.

☐ *Payments Plan Options*

Yes, pay in full clients are great. But so are clients who just prefer to spread out that purchase over time, a time frame that you decide on. And offering a payment plan will actually convert more buyers over all!

☐ *Bonuses After Closing The Checkout Page*

Most bonuses get added to the checkout page, and yes you should definitely add them there. But I had a client where we added an extra bonus on the thank you page and in the welcome email and let me tell you, the amount of excited emails we received back was mind blowing. And funny enough... client retention went up 😊. This extra bonus did amazing work reinforcing their decision to buy.

Page & Conversion Optimization

☐ *A/B Testing Sales Or Landing Pages*

A lot of clients that I begin working with have a sales funnel that they set up once and never went back to. It was working well-enough, why touch it, right? Wrong!! Working well-enough means that there is actually so much more room for improvement (and sales!). A/B testing can help you with this, we can play with messaging in headlines, button colors, pricing and see which version actually connects with leads better through real data.

☐ *Social Proof Placement*

I bet that you have social proof on your sales page, but do you have it in the right place? And yes, there is a difference. It should be placed in areas where the client may be hesitating - like near the investment section or near a "Join Now" button.

☐ *Exit-Intent Popups on Key Pages*

This is a place that gets forgotten about... all. of. the. time. It's a gentle way to speak to that lead that may be on the fence but is not ready quite yet (and they therefore leave the sales page or checkout page). Having an exit-intent popup in these key moments changes that outcome.

Post-Purchase Flow

☐ *Thank You Page Upsells or Next Step Offers*

This is a bit different than an order upsell or a thank you page bonus because this offer is shown to the client after they have already purchased. And it's a great place to share a related but separate offer, add an invitation to book a call, or prompt the client to join a community. Basically it's something that moves the relationship forward instead of just closing the loop on the sale.

☐ *Automated Onboarding Sequence Triggered with Purchase*

So many funnels are focused on getting the sale - and I mean, duh, that's the whole point of it. But it's also super important to make the lead who turned into a client feel celebrated and secure in their decision. An onboarding sequence is perfect for this.

Yes, there are a TON of places and things you can do to uplevel your sales funnel. Do you need to do every single one of these? No. But these all will help you convert more leads into sales and isn't that the point of making a sales funnel?

And while I wove in a few examples into specific tools above, here are some other real-life ways implementing these items boosted sales for my clients:

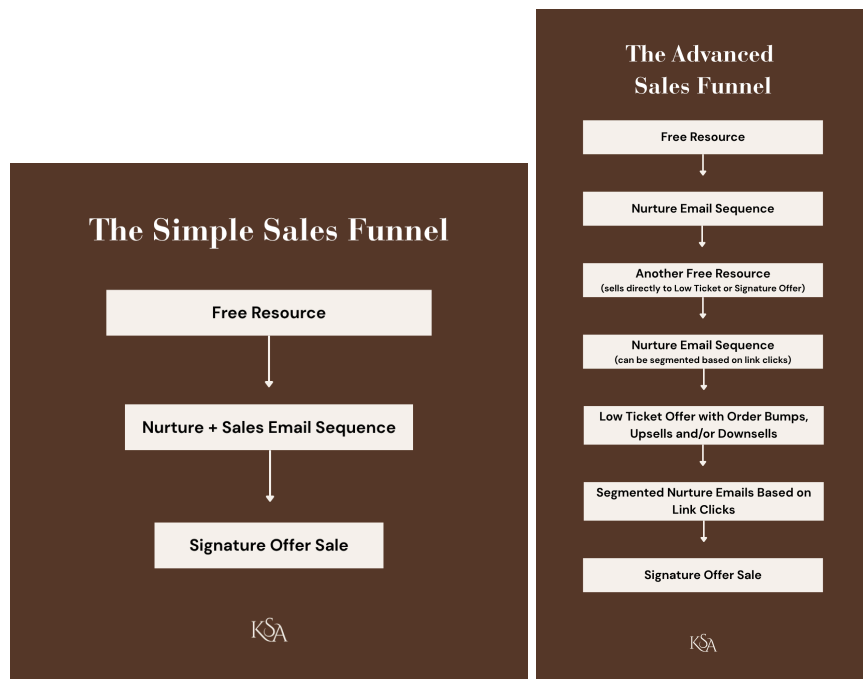
- Client E has been hosting a monthly masterclass for months. And all of the marketing was done organically through social posts and emails to his current list. On aBut when I got into his funnel and implemented his meta pixel and conversion events so his marketing team could run ads, his webinar sign ups grew by 200%. And his conversion rate on the webinar went from 2% to 4%.
- Client R has a Low-Ticket Funnel that has been converting 3.5%. She has quite a large audience so this was fine, for a while. Then she started getting this feeling that it could be so much better. So we started A/B testing the checkout page and we added in a segmented nurture sequence to link clicks but no purchases and we boosted that conversion rate to 5%!

Part 04: The 411 Of Sales Funnel Systems

I want to address what tends to be a rather large elephant in the room... tech. Especially the tech systems for setting up and establishing a funnel. Because there are a lot of moving pieces and it can get really confusing! I once had a client tell me that she felt like her tech systems were held together by bubblegum and I would bet that you might be able to relate to that.

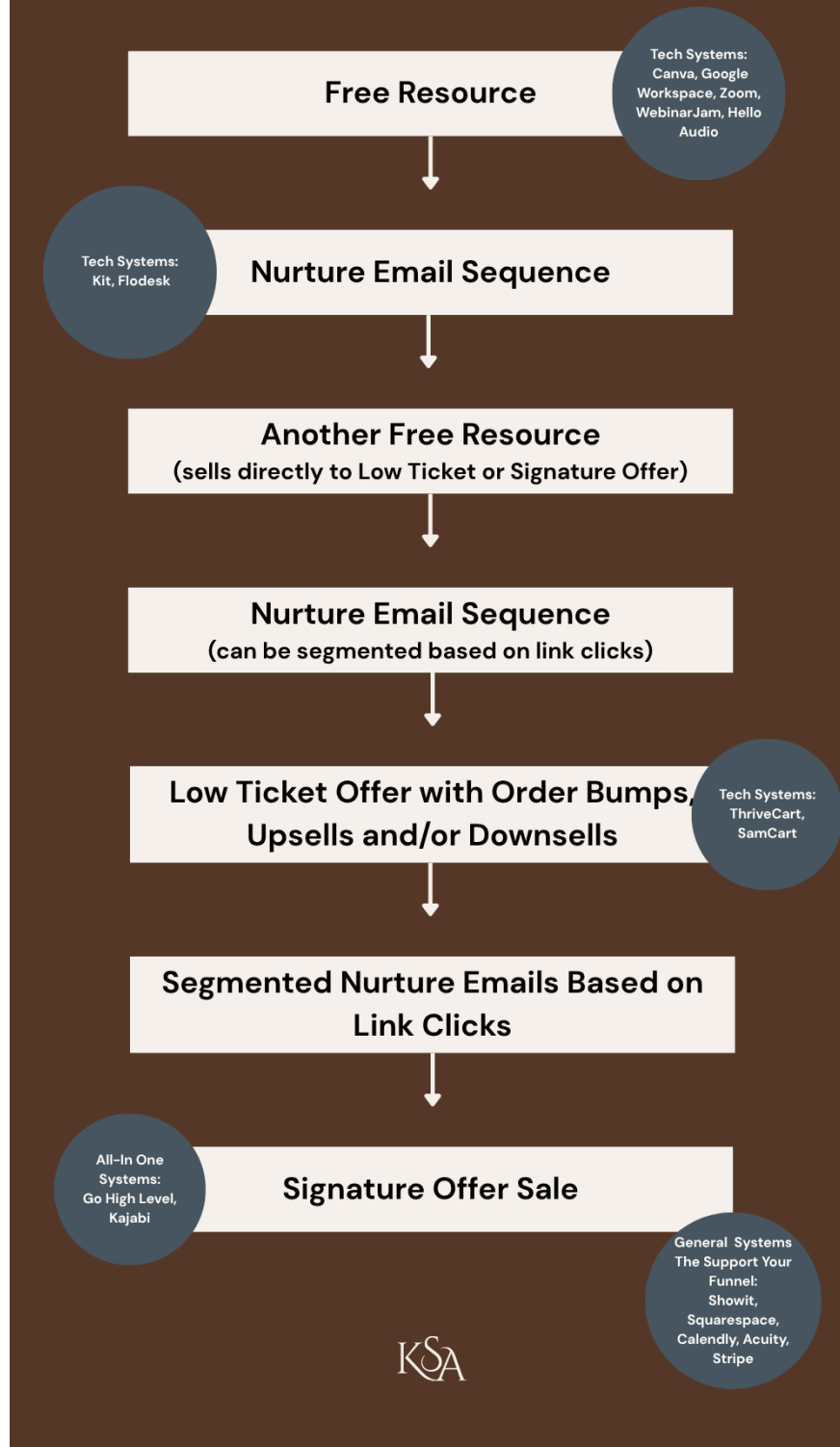
So let's break it down into a more digestible (hopefully) image so you can better wrap your head around how all of these parts connect to each other.

First things first, let's go back to the image of our funnels so you can have a visual of what we are setting up.



Now, let's layer in some suggested platforms to use at each stage of that funnel.

The Advanced Sales Funnel



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And finally, in case this is easier to see, here is a table that lists each of the tech systems.

Free Resource Entry Point	Forms & Email Marketing Platforms	Checkout Pages & Offers	All-In-One Platforms	General Systems That Support The Funnel
> Canva > Google Workspace > Zoom > WebinarJam > HelloAudio	> Kit > FloDesk	> ThriveCart > SamCart	> GoHighLevel > Kajabi	> ShowIt > Squarespace > Calendly > Acuity > Stripe > Zapier

Now, there are definitely more tech systems out there for funnels. But these are the ones that I see and work with the most, especially with coaches, therapists and online service providers.

An important part - how do these all connect together. If you are going with an all in one platform like GoHighLevel or Kajabi, you don't really have to worry about that. But if you are linking other platforms together, first look for a direct integration. Meaning do the two platforms you're connecting talk directly to each other. This is the case, for example, with Thrivecart and Kit or FloDesk. A quick google or platform help center search can tell you this.

If your platforms do not have a direct integration, Zapier is going to be your best friend. It's a 3rd party platform that connects lots of systems together.

That, my friend, is the 411 on sales funnels systems. And the biggest piece of advice I could give you when it comes to these is - **no system or set of systems is going to be perfect.** Pick the ones that you are comfortable learning and commit to them. The grass is not always greens on another platform.

What's Next?

Maybe you've read through this guide and overwhelm has started to set in.
Or you just really don't have the time to make the upgrades you know your sales funnel needs.
Or you are still really not feeling confident in the funnel that you've built.

Then I would love to work with you! I have a Done-For-You Sales Funnel Build that gets everything in your sales funnel set up for you.

Seriously, how good would that feel to just know it's handled (queue an Oliva Pope meme here).

If that sounds like something you absolutely need for your sanity, I tell you all about the project below.

[Learn About The DFY Sales Funnel Build](#)