Funnel planning workbook

Map one offer from first visit to a clear next step, then review the journey on a phone.

Use this workbook on screen or print it. Type into the blue-tinted fields, save a copy and keep your completed notes with your business files.

Business or project

The next step you want to make clearer

Open the companion resource at influxentrepreneur.com

Start with one customer job

Choose one offer and one audience for this exercise. Describe what the customer is trying to get done and what they need to know before taking the next step.

A resource request, a service inquiry, an appointment and a paid order are different actions. Give each one the confirmation and follow-up that its visitor expects.

The audience and the job they are trying to get done

The offer or resource, with its actual deliverable

The action that should happen at the end of this journey

Map the journey before adding pages

Write the pages or screens in the order a visitor needs them. A paid journey usually includes the offer, options, cart or review, checkout and a real order confirmation. A free resource needs a request or download step and working access.

Do not send every visitor to payment. A request for a quote or an appointment should keep its own clear next step.

The starting page and how people arrive there

Each next screen, in order, with its purpose

The confirmation or access the visitor should receive

Make every button describe its destination

Use labels that explain what happens: compare plans, preview this design, request a consultation or review this product. Keep repeated primary actions pointed at the same intended next step.

After clicking, the visitor should recognize the same offer, design or selected option. Add a quieter way to ask a question where a decision needs more context.

Your main button label and its exact destination

What information or selection must carry forward?

The help or fallback route if the visitor is not ready

Put purchase conditions beside the decision

Use the current listing and checkout as your source of truth. Review the price, billing interval, setup fee, any trial dates, required options and the full displayed total.

Record unresolved details before publishing. A download, a recurring service and a shipping quote have different conditions. Do not make up a deadline, discount, availability claim or guarantee.

The charges and conditions the visitor needs to review

The options, limits or prerequisites that matter to the purchase

A detail that needs confirmation before the page is finished

Review the page on a phone

Open the journey in portrait view. Read the offer and price without zooming. Check that the main action is visible, images show what matters and no floating panel covers text or controls.

Try a longer name, a missing required field and an unavailable option. Errors should explain what to fix. A loading state should not look like a successful submission.

Where reading or choosing feels difficult on a phone

The field or control you tested, and what actually happened

The change you will make first, and how you will recheck it

Make confirmations true and useful

A confirmation should state only what has actually happened. A received inquiry is not a paid order. A service purchase is not automatically an appointment. A download link should lead to the promised file.

After a paid checkout, use the real order reference and account access. For a free resource, show the resource immediately or describe the actual delivery method.

What the visitor has actually completed at this point

What they can access now, and the working link

What happens next, and who is responsible

Test the path, including the awkward cases

Check links and forms as a new visitor. Repeat the essential path on a phone and a larger screen. Test the light and dark appearance if both are offered.

Record the selected option, displayed amount and expected confirmation. Use an authorized test process for payments, bookings and notifications; do not treat a visible form as a completed transaction.

Test: starting screen, action and expected result

Actual result: selected item, amount, confirmation or error

Fix or unresolved question, with its owner

Choose one improvement to measure

Find the point where the next step is least clear. Change that point first so you can understand what changed. Removing confusion is a useful goal even before you have enough traffic for a comparison.

Track a meaningful action such as completed resource requests, qualified inquiries or purchases. Keep the date range and the definition consistent. Do not promise a conversion increase before measuring it.

The bottleneck you want to improve

The single change and the action you will count

What you will compare, and when you will review it

Write the handoff brief

Use this page to turn the plan into a clear assignment. Include the offer, the path, the deliverable and the checks that define completion.

If you need implementation help, review the scope and current options in the Influx catalog. Confirm the actual work before purchasing a service.

Audience, offer and primary action

The page sequence and links that need work

Deliverable, owner and acceptance checks