

Quick-Start Guide: Your Funnel Worksheet Roadmap

*Welcome! You now have 8 powerful worksheets plus a bonus review.
But where do you actually start?*

This guide shows you the fastest path from "I'm not sure what to do" to "I have a working funnel."

If You're Starting From Scratch: The Foundation Path

Week 1: Build Your Core Structure

Day 1-2: Start Here

→ Worksheet 1: Core Offer Clarity Builder

Why this first? Everything else depends on having one solid offer. If this isn't clear, nothing else will work.

You're done when: You can explain your offer in one sentence to a friend.

Day 3-4: Map Your Path

→ Worksheet 2: Complete Offer Path Planner

Why now? Once your main offer is solid, you need to know what comes next.

You're done when: You have one bump, one upsell, and one downsell defined (even roughly).

Day 5-6: Write It Simply

→ Worksheet 5: Simple Copy Clarity Guide

Why now? You know what to offer—now make it clear and easy to understand.

You're done when: Your bump and upsell copy passes the "friend test."

Day 7: Create Your Action Plan

→ Worksheet 8: 7-Day Funnel Setup Action Plan

Why last? This turns everything you've planned into a buildable schedule.

You're done when: You have specific tasks assigned to specific days.

Week 2: Build & Launch

Follow the daily tasks in Worksheet 8. By the end of this week, your funnel should be live.

If You Already Have a Funnel: The Optimization Path

Week 1: Diagnose & Fix

Start Here

→ Worksheet 3: Funnel Health Snapshot

Why this first? Find out where money is leaking before you change anything.

You're done when: You've identified your biggest leak and chosen one focus area.

Next

→ Worksheet 4: Friction Finder & Fixer

Why now? Most leaks come from friction, not bad offers.

You're done when: You've tested on mobile and fixed 3 obvious problems.

Then

→ Worksheet 5: Simple Copy Clarity Guide

Why now? After fixing technical friction, improve your messaging.

You're done when: Your copy is clearer and more helpful than before.

Finally

→ Bonus Worksheet: Weekly Funnel Review

Why now? Track whether your changes actually worked.

You're done when: You've scheduled weekly check-ins for the next month.

If You Want to Increase Customer Value: The Growth Path

Week 1: Build the Backend

Start Here

→ Worksheet 7: Good-Better-Best Offer Ladder

Why this first? See the full picture of where customers can go.

You're done when: You've identified your biggest gap and planned one new offer.

Next

→ Worksheet 6: Post-Purchase Email Planner

Why now? You need a system to guide buyers up your ladder.

You're done when: You have 3-4 emails planned for new buyers.

Then

→ Worksheet 2: Complete Offer Path Planner (revisit)

Why now? Update your funnel to include your new backend offers.

You're done when: Your funnel connects to your email sequence naturally.

Finally

→ Bonus Worksheet: Weekly Funnel Review

Why now? Track lifetime value as it grows.

You're done when: You're monitoring repeat purchase rates monthly.

The "I'm Overwhelmed" Emergency Path

Feeling stuck? Do just these three things:

This Week Only:

Monday: Worksheet 1 (30 minutes)

Clarify your one main offer

Wednesday: Worksheet 2 (45 minutes)

Add one bump and one upsell

Friday: Worksheet 5 (30 minutes)

Write simple copy for both

That's it. You now have a basic funnel plan. Build it next week using Worksheet 8.

Common Questions

"Do I need to complete every worksheet?"

Of course not. You just use those that you need now. Then use any other worksheet as needed.

- Worksheets 1, 2, 5, 8 = minimum to build a funnel
- Worksheets 3, 4 = for fixing existing funnels
- Worksheets 6, 7 = for growing customer value
- Bonus Worksheet = for ongoing tracking

"Can I skip ahead?"

You can, but don't skip Worksheet 1. Everything builds on having a clear core offer.

After that, jump to what you need most:

- Leaking money? → Worksheet 3
- Clunky experience? → Worksheet 4
- Need more sales per customer? → Worksheets 6 & 7

"How long should each worksheet take?"

Quick worksheets (15-30 min):

- Worksheet 1
- Worksheet 3
- Worksheet 4
- Bonus Worksheet

Deeper worksheets (45-60 min):

- Worksheet 2
- Worksheet 5
- Worksheet 6
- Worksheet 7

Planning worksheet (20 min):

- Worksheet 8

Don't overthink it. Messy and done beats perfect and stuck.

"What if I don't have all the answers?"

That's normal. Write your best guess and mark it with a ★

Come back to starred items after you:

- Talk to a customer
- Review past sales
- Test something small

Progress beats perfection.

"Should I work alone or with someone?"

Work alone for:

- Worksheets 1, 2, 3 (your business, your clarity)

Consider working with a partner or friend for:

- Worksheet 4 (they'll spot friction you miss)
- Worksheet 5 (they'll tell you if copy is clear)

Get customer input for:

- Worksheet 6 (ask what helped them most)
- Worksheet 7 (ask what they wanted next)

Your First Step Right Now

Don't overthink which path to choose.

Answer this one question:

"Do I have a funnel that's live and getting traffic?"

No → Follow the Foundation Path starting with Worksheet 1

Yes, but it's not making enough money → Follow the Optimization Path starting with Worksheet 3

Yes, and it works, but I want more per customer → Follow the Growth Path starting with Worksheet 7

I'm completely overwhelmed → Follow the Emergency Path (just 3 worksheets)

Printable Checklist: What to Do Today

Pick your path and check off your first step:

Foundation Path

- ☐ Print Worksheet 1
- ☐ Block 30 minutes on calendar
- ☐ Complete Core Offer Clarity Builder
- ☐ Schedule Day 3 to start Worksheet 2

Optimization Path

- ☐ Print Worksheet 3
- ☐ Gather last 30 days of funnel data
- ☐ Complete Funnel Health Snapshot
- ☐ Identify your biggest leak

Growth Path

- ☐ Print Worksheet 7

- ☐ List all current offers
- ☐ Complete Offer Ladder
- ☐ Identify your biggest gap

Emergency Path

- ☐ Print Worksheets 1, 2, and 5
- ☐ Schedule 3 sessions this week (Mon/Wed/Fri)
- ☐ Start with Worksheet 1 today
- ☐ Done is better than perfect

Remember:

- You don't need to do everything at once
- One completed worksheet is better than eight started
- Messy action beats perfect planning
- You can always come back and improve later

Pick one worksheet. Start today. Build momentum.

Your funnel doesn't need to be perfect.

It just needs to exist.

Ready? Pick your path above and open your first worksheet.