

Worksheet 3: Funnel Health Snapshot

Purpose: Identify where money is leaking in your current funnel

Step 1: Gather Your Numbers (Last 30 days)

Total visitors to offer page: _____

Total buyers: _____

Main offer conversion rate: _____ %

Buyers who added order bump: _____

Bump acceptance rate: _____ %

Buyers who saw upsell: _____

Buyers who accepted upsell: _____

Upsell acceptance rate: _____ %

Buyers who saw downsell: _____

Buyers who accepted downsell: _____

Downsell acceptance rate: _____ %

Total revenue: \$ _____

Total orders: _____

Average order value: \$ _____

Total refunds: _____

Refund rate: _____ %

Step 2: Identify Your Biggest Leak

Check the box that matches your situation:

- ☐ Main offer isn't converting (below 2-3%) - Issue likely: Unclear promise or weak trust
- ☐ Bump/upsells barely get traction (below 15%) - Issue likely: Offers don't fit the moment
- ☐ High traffic to upsell, low purchases - Issue likely: Friction or confusion
- ☐ Refunds keep coming back (above 5%) - Issue likely: Mismatched expectations

Step 3: Choose Your Focus

The one area I'll improve first:

The specific change I'll make:

When I'll implement this: _____