

FUNNEL MAPPING TEMPLATE

This template helps you map the full customer journey from first contact through to loyalty.

It ensures clarity across teams, reduces guesswork, and allows you to plan intentional, consistent touchpoints at each stage.

01 CHOOSE THE AUDIENCE SEGMENT

Choose the specific type of client or customer you're mapping.

02 WORK THROUGH THE FUNNEL

At each stage, answer five consistent mapping questions:

Goal: What is the user trying to accomplish at this stage?

Mindset: What they think, feel, fear, hope or believe here.

Touchpoints: What content, channels, actions, or assets they encounter.

Required Actions / CTAs: The action you want them to take at this stage.

Gaps / Opportunities: What's missing today? What could improve this moment?

03 IDENTIFY FRICTION & FIXES

Highlight moments where:

- Users drop off
- Messaging is inconsistent
- Processes take too long
- Tools are missing
- Experience is unclear

04 PRIORITISE & IMPROVE

Mark each opportunity as:

- Quick win
- High impact
- Longer-term investment



AWARENESS

This is where your audience discovers you exist.

THEY NEED: clarity, intrigue, relevance

TOUCHPOINTS: ads, social content, PR, thought leadership

INTEREST

At this point they pay attention, read, browse, or enquire.

THEY NEED: education, simple value, easy next steps

TOUCHPOINTS: website pages, guides, lead magnets, nurture emails

CONSIDERATION

Now, they start to evaluate you vs alternatives.

THEY NEED: proof, credibility, comparisons, reassurance

TOUCHPOINTS: case studies, testimonials, "Why us" materials

INTENT

They are now serious and want specific information.

THEY NEED: detail, clarity, confidence, process explanation

TOUCHPOINTS: proposals, explainers, webinars, demos

PURCHASE

They commit to you - onboarding, agreements, payment.

THEY NEED: professionalism, smooth process, no friction

TOUCHPOINTS: onboarding workflows, welcome packs, billing guidance

LOYALTY

They stay, renew, refer, and expand.

THEY NEED: ongoing value, momentum, proactive communication

TOUCHPOINTS: reviews, check-ins, referrals, upsell frameworks

READY TO START MAPPING YOUR FUNNEL? →

CHOSEN CLIENT OR CUSTOMER:

A. WHERE YOUR AUDIENCE DISCOVERS YOU EXIST.

AWARENESS	ANSWERS	SCORE
Their Goal:		/10
Their Mindset:		/10
Your Touchpoints		/10
Desired Action / CTA		/10
Gaps		/10
Opportunities		/10

1-3 Needs attention | 4-6 Adequate | 7-8 Strong | 9-10 Excellent

B. WHERE YOUR AUDIENCE PAYS ATTENTION, READ, BROWSE, OR ENQUIRE.

INTEREST	ANSWERS	SCORE
Their Goal:		/10
Their Mindset:		/10
Your Touchpoints		/10
Desired Action / CTA		/10
Gaps		/10
Opportunities		/10

1-3 Needs attention | 4-6 Adequate | 7-8 Strong | 9-10 Excellent

CHOSEN CLIENT OR CUSTOMER:	
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C. WHERE YOUR AUDIENCE START TO EVALUATE YOU VS ALTERNATIVES.

CONSIDERATION	ANSWERS	SCORE
Their Goal:		/10
Their Mindset:		/10
Your Touchpoints		/10
Desired Action / CTA		/10
Gaps		/10
Opportunities		/10

1-3 Needs attention | 4-6 Adequate | 7-8 Strong | 9-10 Excellent

D. WHERE YOUR AUDIENCE IS NOW SERIOUS AND LOOKING FOR REASSURANCE BEFORE MAKING A DECISION.

INTENT	ANSWERS	SCORE
Their Goal:		/10
Their Mindset:		/10
Your Touchpoints		/10
Desired Action / CTA		/10
Gaps		/10
Opportunities		/10

1-3 Needs attention | 4-6 Adequate | 7-8 Strong | 9-10 Excellent

CHOSEN CLIENT OR CUSTOMER:

E. WHERE YOUR AUDIENCE COMMITS - ONBOARDING, AGREEMENTS, PAYMENT.

PURCHASE	ANSWERS	SCORE
Their Goal:		/10
Their Mindset:		/10
Your Touchpoints		/10
Desired Action / CTA		/10
Gaps		/10
Opportunities		/10

1-3 Needs attention | 4-6 Adequate | 7-8 Strong | 9-10 Excellent

F. WHERE YOUR AUDIENCE STAYS, RENEWS, REFERS, AND EXPANDS.

LOYALTY	ANSWERS	SCORE
Their Goal:		/10
Their Mindset:		/10
Your Touchpoints		/10
Desired Action / CTA		/10
Gaps		/10
Opportunities		/10

1-3 Needs attention | 4-6 Adequate | 7-8 Strong | 9-10 Excellent

WHAT FRICTION OR FIXES DID YOU IDENTIFY?

Mark each opportunity with a priority level and whether it's a quick win, high-impact or longer-term improvement.



HIGHLIGHT MOMENTS WHERE:

Messaging is inconsistent

Tools are missing
or too confusing

Processes
take too long

Experience
is unclear

[illegible]