



THE FUNNEL SERVICES BLUEPRINT

**HOW TO DELIVER CLIENT
FUNNELS AT SCALE...**

**WITHOUT BEING
STRESSED OUT
(OR DOING IT ALL YOURSELF)**

Hi, I'm Mikael Dia, and I help digital marketers shift their mindset from selling individual marketing services to creating scalable funnel marketing agencies.

I have built three 7-figure businesses in three vastly different niches, including my Funnels as a Service (FaaS) Agency, White Coat Digital.

Every one of those businesses had to not only attract clients and get them to pull out their credit card, but they also needed to deliver on their product.

Obviously delivering a digital product (like we did at IIFYM) or a SaaS subscription product (like I do at [Funnelytics](#)) is different from delivering a high-ticket sales funnel to a FaaS Client, so I'll talk about those processes some other time.

Today we're going to talk about the systems and processes that helped me deliver high-quality funnels to my clients.

Because let's face it... building a funnel takes a whole lot of work.

And even if you've [Systemized your Agency](#), streamlined your [Client Attraction Process](#) and figured out how to [Close Clients with a High-Ticket Mindset](#)... you still have to actually deliver on your promises.

And if you don't manage to do that in a smart, streamlined way, it can destroy your business.

I designed The Funnel Services Blueprint to help you avoid some of the common pitfalls that FaaS Agency Owners – including myself! – make when it comes to delivering funnels to their clients and to give you a clear set of steps to follow as you start to systemize your delivery process.





ARE YOU THE BOTTLENECK IN YOUR BUSINESS?

When I started White Coat Digital, I had an idea, a skill set and a few clients... and no idea what I was doing. Sure, I knew how to start a business. I had figured out the funnel thing and I knew that I could help my clients.

I had even figured out how to attract quality clients in a consistent, predictable way, and fill up my calendar every day with calls that I could close with ease for high-ticket retainers.

For a little while I was on top of the world... until it all started to tumble down around me.

It came to a head in early spring of 2017, when I was supposed to be vacationing with my wife and our new baby girl in San Diego. What was supposed to be a relaxing family vacation became ten crazy, stressful days of being strapped to my laptop in the hotel room, talking to my team and putting out fires with pissed off clients while my wife and daughter walked up and down the beach alone.

Afterward my wife said she wished we had never even gone on vacation in the first place, and it forced me to really look at what was happening in my business. **I was overworked, stressed out, and in way over my head... and I had to admit that the FaaS Agency I had built wasn't sustainable at all.**

I realized several things in pretty rapid succession:

- 1) I had made a huge mistake when I was building my agency by not establishing a niche
- 2) My team was in chaos and my clients were pissed off because every single funnel had to be custom built from scratch (which wasn't sustainable) and I didn't have a system...
- 3) And I was the bottleneck in my own business

I had figured out how to attract and close my dream clients, but I didn't have the structure in place to scale my agency in a sustainable way.

I'll be really honest with you right now – the learning curve was steep. I had made some pretty major mistakes already; everything was super chaotic, and I still had funnels to deliver... all different kinds of funnels

I had a lot of pissed off clients who were waiting for work, and I couldn't even bring in other people to help because I hadn't systemized a way to onboard new team members and get them up to speed. And even if I had that process in place, every single funnel we were building was completely different...

Which means that as the sole strategist, every single funnel map, plan, deliverable and update had to come through me at some point – and there just wasn't enough of me to go around.

I had to take a big step back, take a long hard look at my business... and, scariest of all, stop selling new funnels while my team finished our current client work and I figured out the systems and processes that would make my agency sustainable moving forward.

One of the biggest complaints I hear from members of the [FaaSTrack Program](#) is that they don't want to have to pick a niche. They're afraid of leaving money on the table, and I totally get that.

But I'm here to tell you again: YOU NEED A NICHE.

You don't have to only sell funnels in that niche forever, but you absolutely need a niche if you want to be able to systemize your business and scale sustainably. Once you have a process that works like clockwork for your dream client, that's when you can start looking at other niches and expanding your client base.

Now, if you want to stay a freelancer or whatever who only delivers a funnel or two at a time and you're happy where you're at, you can skip that step.

But if you'd like to consistently deliver results to your clients without having to do all the work yourself, if you want to be able to go on vacation with your family and your loved ones, if you want to be able to make money without working yourself to death...

You should probably go check out [The Funnel Client Attraction Cheatsheet](#). Do the exercises. Figure out who you can help and how you can help them in a systemized way.

Then come back here so we can talk about the meat and potatoes of running a FaaS Agency – delivering funnels to your clients while systemizing your delivery process so you're no longer the bottleneck in your business.





GET EVERYONE ON THE SAME PAGE

Before you can build a funnel and deliver it to your client, you have to have a plan. Without a clear, functional plan, your funnel probably won't be successful.

The hard truth is that most funnels fail initially. You do all this work, you launch, you start running ads – and you hear crickets.

But if you're smart and make a solid plan for your funnel before you even start building, you're going to increase the likelihood of having a successful launch.

And if you establish a niche and you're building the same kind of funnel for the same kind of client every single time, the likelihood of success on launch increases with every build because every funnel refines your process.

Planning a successful funnel starts the moment you've signed a new client. As soon as they send back their contract and their deposit is in the bank, it's time to start getting everyone on the same page.

Which means you need to:

- ✓ Send the Client Onboarding Questionnaire
- ✓ Funnel hack their competitors
- ✓ Decide on your funnel
- ✓ Put together your funnel map
- ✓ Forecast your results
- ✓ Create your funnel task list
- ✓ Create your 60 Day Project Plan Calendar
- ✓ Compile and present your Funnel Blueprint

So let's start by creating a Client Onboarding Questionnaire.

CREATING A CLIENT ONBOARDING QUESTIONNAIRE

The Client Onboarding Questionnaire serves a very important purpose – it helps you extract the information that you need from your client in order to get to know their business and have the highest likelihood of success.

Even if you know your niche in and out, it is important that you do not skip this step. Every single business is different, with different stories, different payment structures, different packages and offers.

It's your job to dig in and figure out what makes your client unique so you can use that as a hook to bring in clients for their business.

The easiest way to do this is by sending them a comprehensive questionnaire to complete before you schedule your initial kickoff call.

It's important to get your client to take the time to thoroughly complete your questionnaire. While you can get them on the phone and go over this step by step, I've found it's usually easier to get comprehensive answers from your client if they take the time to fill out the written questionnaire, and it reduces the chances of miscommunication between you and your client.

At minimum, your Client Onboarding Questionnaire should cover the following subjects:

- 1) Business Background
- 2) The Core Offer
- 3) Dream Customer Before/After
- 4) Their Competitors

The goal of the Client Onboarding Questionnaire is to do essentially the same thing for your client that you did for your own business when you defined your own niche – it's to really drill down into the wants and needs of their Dream Customer. You need to get their customer's pains and their desires as well as how your client's product will help them if you want to have a successful funnel.

Once your customer has filled out the initial questionnaire, you may find that you have more questions.

That's when I would recommend following up with a second questionnaire that includes in-depth questions about the company, the attractive character, upsells, downsells and the specifics of how their product helps their customer.

I wouldn't send these simultaneously – get them to finish the first one, then fill out the second. Answering these questions is likely to be pretty overwhelming for your client even though it's not that complicated, because it forces them to sit down and take a look at their business.

But that's also the powerful thing about the Client Onboarding Questionnaire. When your client goes from filling out the initial questionnaire to answering deeper questions about their business, they're probably going to think about their business in a way they never have before – and they'll realize that no other marketer has come in and helped them think about their business like this.

That positions you as a dependable authority right at the beginning of your project together, which is exactly where you want to be...

And it gives you all the information your team is going to need to be able to create the perfect copy and funnel for your client.

With your Dream Client in mind, use the sections and questions on the next few pages to create your own Client Onboarding Questionnaire that collects all the information you need to get off to a strong start with your client.

CLIENT ONBOARDING QUESTIONNAIRE

BUSINESS BACKGROUND

What's the story behind your business?

How did you get your start and who were the key players? If you had to tell a story about how your business happened, what would you say?

What is the Business's Unique Value Proposition? What does your company do that no one else does, and why do people choose it?

CORE OFFER

What is the CORE product or service that you want people to buy from you?

What are all the pieces/things that a customer gets when purchasing?

What is the price of your core offer?

Why do people buy it?

What does it do for people? What are the benefits?

What bonuses or guarantees does it come with?

Do you currently have testimonials or success stories from your core offer?

DREAM CUSTOMER BEFORE YOUR OFFER

What would you say your ideal client is like? Can you tell us:

- ▶ Their age?
- ▶ Profession?
- ▶ Background?
- ▶ Other demographic information?
- ▶ Hobbies?
- ▶ Marital status?
- ▶ Mental/physical health?
- ▶ What do they follow on Facebook? (public figures, brands, etc.)

DREAM CUSTOMER AFTER YOUR OFFER

What is their average day like AFTER they purchase your Core Offer?

What types of results can they expect?

What step-by-step journey did they take to achieve these results?

COMPETITORS

Who are your top 5 competitors?

What are their URLs?

What are their Unique Value Propositions?

CLIENT FOLLOW UP QUESTIONNAIRE

COMPANY	ATTRACTIVE CHARACTER
<ul style="list-style-type: none"> ▶ What is your company's mission statement? ▶ What is your company's vision statement? Where do you see your business in the next year? Five years? ▶ What are your business values? 	<ul style="list-style-type: none"> ▶ Who is the "face" of your business? ▶ What is his/her story? ▶ Where do they come from? ▶ What do they stand for? ▶ What's their backstory?
FRONT-END / ENTRY OFFER	BACK-END / UPSELL OFFER
<ul style="list-style-type: none"> ▶ What offers can your customers purchase BEFORE purchasing your Core Offer? ▶ What does it do for people? What are the benefits? ▶ What bonuses or guarantees does it come with? ▶ What is the price point? ▶ Describe how this offer is the logical entry for your Core Offer ▶ Do you currently have testimonials or success stories from your entry offer? 	<ul style="list-style-type: none"> ▶ What can your customers purchase AFTER your Core Offer? ▶ What does it do for people? What are the benefits? ▶ What bonuses or guarantees does it come with? ▶ What is the price point? ▶ Describe how this offer is the logical NEXT STEP to your Core Offer ▶ Do you currently have testimonials or success stories from your secondary offer?
CUSTOMER	
<ul style="list-style-type: none"> ▶ What questions does my current audience have about products like mine? ▶ What are their top three immediate goals my product helps them achieve? ▶ What are the top three problems that are standing between them and their goals? ▶ What objections might they have to purchasing a product like mine? ▶ What other options do they have to solve their problems? 	<ul style="list-style-type: none"> ▶ What three common situations are they likely to be in with respect to the goal they're looking to achieve? ▶ What are their past failings that have thus far prevented them from realizing their dreams? ▶ What are their suspicions about the people they must deal with to solve their problems, achieve their goals, get their questions answered, and pursue their dreams?



HIT THE GROUND RUNNING

While your client is filling out their questionnaire, you can start analyzing their existing data to find out if there are some places you can get some quick wins for your client.

The first thing you need to do is get access to their Google Analytics so you can understand their site traffic.

Most people already have Google Analytics, but if they don't for some reason, it's possible that the first quick win you can give them is to help them get that installed and be able to actually see their traffic flow.

Start gathering information about how many sales of their core offer they're already generating, and what follow-up they already have in place. You may already have this information from your Discovery Call, but use Google Analytics to dig a little deeper and ask lots of questions.

- ▶ How many sales of their core offer are they generating per day/week/month?
- ▶ How are people currently finding their product?
- ▶ How much traffic do they currently have? Where is it coming from?

- ▶ Are they currently spending money on ads? How much? What platforms?
- ▶ Do they currently have lead magnets or articles that are getting a lot of traffic?
- ▶ Do they have existing sales videos or email automations for the product?

By the time a client comes to you, chances are they've tried selling this product before. Dig deep and find out everything you need to know about what they've already done so you don't end up going down a path that didn't work.

Nothing will make a client feel like you aren't going to be able to help them than you going down a path they've already tried without bothering to do your research and have some new insights.

Use all of this information to paint a picture for your client that can both give them insight into their business and why what they've done before doesn't work, but that you can also use to map and plan the funnel you are going to create for them.



FUNNEL HACKING 101

By this point your client should have completed part one of their Onboarding Questionnaire, so you should have a competitor list both from them and from your own research.

The competitor list is a gold mine for a systemized agency – because the fastest path to success is to model a funnel that already works. Don't build anything from scratch. Instead, find the best possible baseline to start from and expand from there.

That means you have to understand your client's competitors and break down their funnels into the individual pieces that will help you be successful.

Members of the [FaaStrack Program](#) have access to the full Funnel Hacking 101 Class taught by Ben Moote, our resident funnel hacker at Funnelytics. So if you want to become an expert at funnel hacking, you may want to check that out.

In the meantime, I'm going to break down the basics right here.

To hack a competitor's funnel, you need to look at every part of that funnel, from ads to sale, and break it down into its individual components.

Start by looking at the path your customer's clients are using to get into their funnel. Are they clicking on a Facebook Ad and landing on a free lead magnet? What is the lead magnet? What happens after you opt in?

What does their sales page look like? What emails are you getting and how often are they sent? Are they running retargeting ads? What platforms are they using?

What does their sales process look like? Is the order form on the sales page or do you have to click through? Do they have an order bump? What is it?

I recommend getting into competitor funnels as early as possible, so you have time to see their email follow-up sequence and retargeting ads to inform your own plan.

Screenshot every single part of the process and use those screenshots to model your own templates and maps (I use the free Chrome plugin "Full Page Screen Capture" for this).

I would also recommend that you buy competitor products and take screenshots through the entire checkout process. What are their upsells and downsells? Do they use videos or text? How do they retarget those offers?

You can expense this to your client, add it into your funnel pricing or request a refund, but it's important that you really see what their competitors are doing and how the offer works.

Then you want to use all the information that you've gathered to help you map the core funnel you're going to be building.



THE 6 BASIC FUNNEL FRAMEWORKS

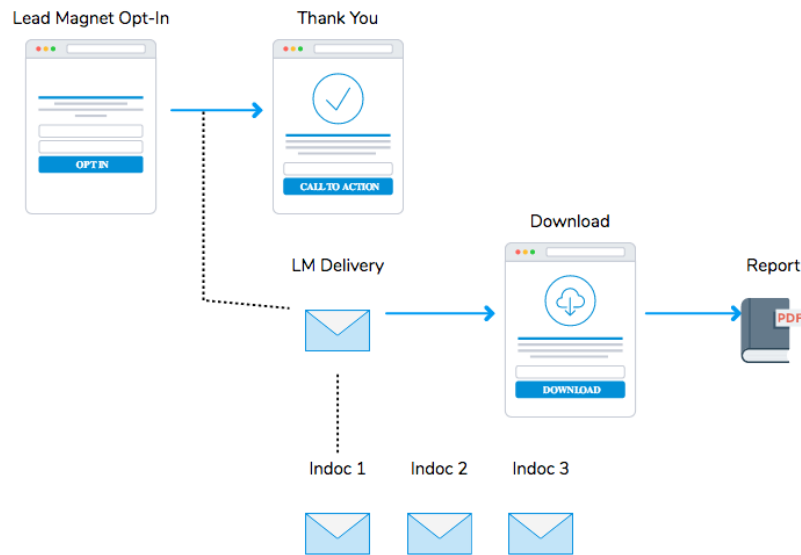
Every single funnel you will ever build will be based on one of the six basic funnel frameworks. These core funnels are:

- 1) Lead Magnet Funnel
- 2) Survey Funnel
- 3) Mini-Class Funnel
- 4) Webinar Funnel
- 5) Sales Funnel
- 6) Application Funnel

Your funnel may combine these funnels – like a lead magnet and a sales page, or a webinar and an application – **but as long as you know how each of these funnels work, you'll be able to combine and map them in effective ways to serve your clients.**

Over the next few pages I will introduce you to each of the six basic funnel frameworks and ways you can use them to create funnels for your clients.

LEAD GENERATION FUNNELS



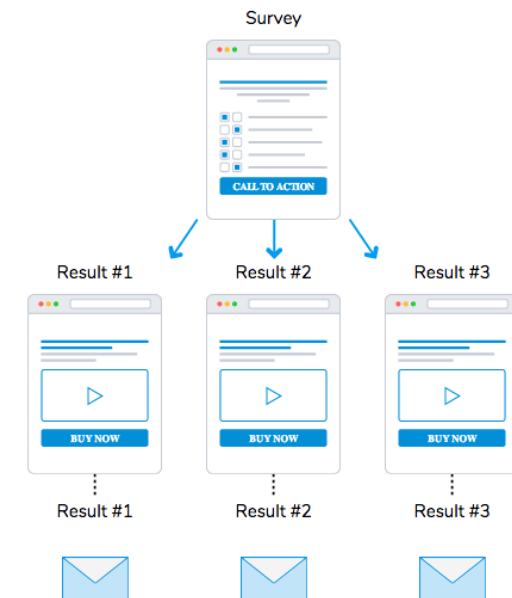
LEAD MAGNET FUNNEL

The Lead Magnet Funnel has an opt-in page where you gather your lead's email address and any other pertinent information in exchange for a free resource, like an informational PDF. Once you have your client's email address, you can deliver the lead magnet on the thank you page, via email or both.

Once a lead is in your funnel, you want to follow up with an Indoctrination (Indoc) sequence that will help them learn more about your client and their story.

The Lead Magnet Funnel and the Survey Funnel are the two core lead generation funnels.

They are both designed to help you generate leads – to convert strangers into people who are on your list.

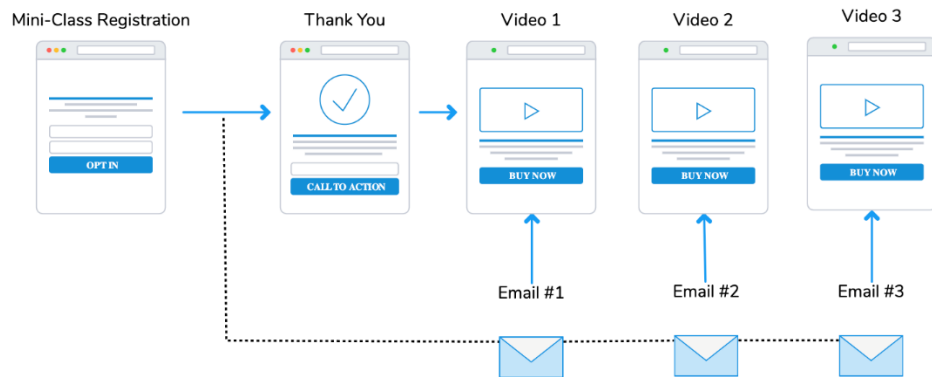


SURVEY FUNNEL

The survey funnel is also a lead magnet, but instead of giving away a free PDF, you gather their email address in exchange for the results of the survey they have taken. Your thank you page will likely be a sales page, with their results coming in a follow-up email that also gives them more information.

This funnel is particularly effective in the self-help and diet industry and can work very well if you offer customized diet plans, personality tests and the like.

EDUCATION FUNNELS



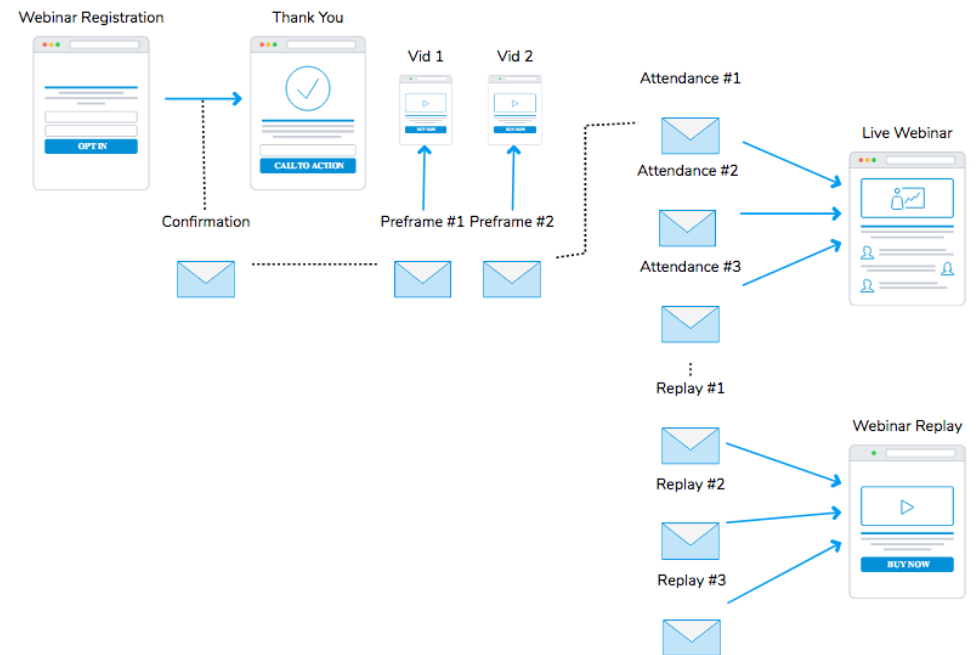
MINI-CLASS FUNNEL

The Mini-Class Funnel starts with a registration page where potential clients opt-in to the funnel by giving their name and email address. Follow that with a thank you page that gives them some more information and sends them to the first part of your mini-class.

In this map we have a video-based mini-class, but some people also successfully do this as an email course.

The two type of education funnels are the Mini-Class Funnel and the Webinar Funnel. Each one of these funnels is designed to “educate” the prospect about the company’s product, their business and how they can help.

Education funnels are perfect if your client’s service has a higher price-point where people might need more information before they are willing to buy.

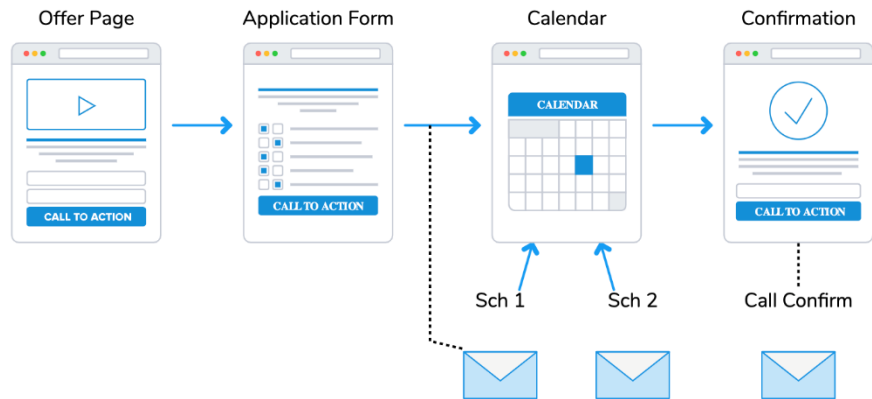


WEBINAR FUNNEL

The Webinar Funnel also starts with a registration page, where your lead is exchanging their name and email address for access to either a live or evergreen webinar.

You will want to follow up registration with a confirmation, several emails to get your potential client excited about what they are going to learn, the webinar itself and the ability to view a replay.

CONVERSION FUNNELS



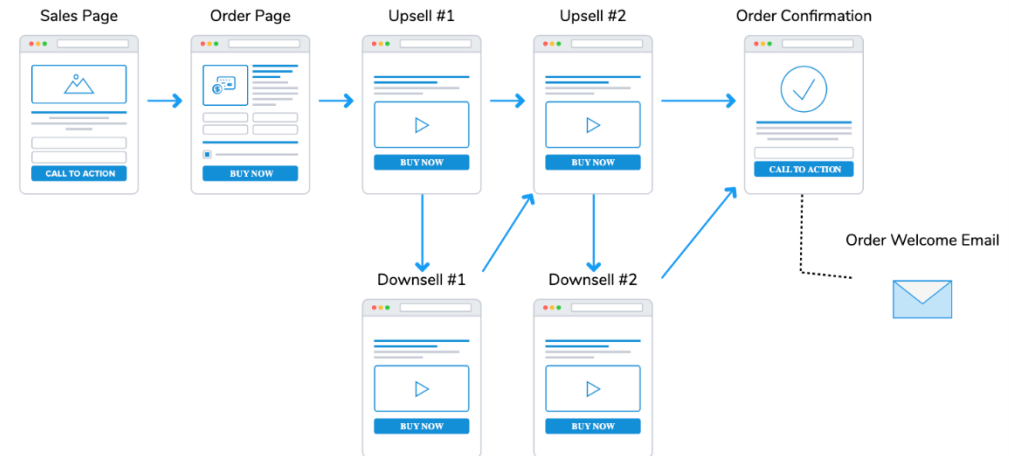
APPLICATION FUNNEL

The application funnel also starts with a sales page that outlines your offer, addresses your prospect's pain points and desires, and tells them how the product or service you're offering will help. But instead of going to a cart page, you follow up with an Application that gathers qualifying information about your clients and then asks them to schedule a call.

If your client's goal is just to get people on the phone and they don't care how qualified the client is, you can also have a lot of success by reversing the order or doing away with the application all together.

The last two of the six essential funnels are the conversion funnels. These are the pages where the potential customer actually *takes the bait* – they buy the product, or they submit an application to get on a call with your client or their sales team.

The first page of these funnels often replaces the “thank you” page in a Lead Generation or Education funnel to start your customer's journey toward the sale.



SALES FUNNEL

A sales funnel consists of a sales page, an order page, and whatever related upsells and downsells you add to the purchase to increase the value of your funnel.

The sales page should address the prospect's pain points and desires, tell them how this product or service can help, and answer any questions they may have.

FUNNEL MAPPING

Now that you have gotten your questionnaire, hacked your customer's competitors and decided what your funnel is going to look like, it's time to map out your funnel and plan your task lists.

Your funnel map is a key part of getting yourself, your client and your team on the same page, because it's a visual outline of what your final funnel will look like. It should include your entire flow, from lead generation sources to sale confirmation.

I built Funnelytics specifically to help with this process – easy funnel mapping, calculating and forecasting your results before you even start to build, and providing clear analytics that simplify the optimization process – so obviously I would love it if you [chose to use Funnelytics](#) to help you build a successful agency.

But if you're not quite there yet, I totally understand. Use the core funnel maps above and the information you gathered from hacking the competitor funnels to create your map.

Then you need to break down each of these funnel map pieces into the checklists you need to make sure each piece gets done.



TURN YOUR MAP INTO A PLAN

The last step of planning your funnel is breaking down your maps into checklists that you can follow every step of the way.

There are four core elements required to build and deliver a funnel:

- 1) Copy – sales pages, video scripts, emails, etc.
- 2) Design – pages, lead magnets, emails
- 3) Video – recording and editing video elements
- 4) Tech Setup – setting up pages, automations, analytics, etc.

Every piece of your funnel is going to require a combination of one or more of these elements to be executed in order to build your funnel successfully. It's important that you know exactly what you're going to need – from lead magnet through the sale – for each piece of your map if you want to keep your funnel build running smoothly.

The more systemized your process, the easier it is going to be to both build your funnels and make sure that everything gets done in a timely manner.

These are also likely going to be areas in which you will need to hire a team to help you once you start to scale your business. I would highly recommend looking at your own abilities, assessing your strength and weaknesses and see where you tend to become the bottleneck in your own process – those are the first people you are going to want to hire as you start to scale.

I'm going to talk more about that later, but first I am going to give you a quick shortcut to systemizing your agency...

Here's the exact checklist I created for my agency to systemize building a Lead Magnet Funnel. Use it to create your own checklists and systemize your funnel builds.

LEAD MAGNET FUNNEL CHECKLIST

OPT-IN PAGE	THANK YOU PAGE	DELIVERY EMAIL	DOWNLOAD PAGE
COPY/DESIGN <ul style="list-style-type: none"> <input type="checkbox"/> Headline <input type="checkbox"/> General Copy <input type="checkbox"/> Call to Action <input type="checkbox"/> Images BUILD <ul style="list-style-type: none"> <input type="checkbox"/> Domain/URL <input type="checkbox"/> Build Elements in Page Builder <input type="checkbox"/> Opt-in Form <input type="checkbox"/> Opt-in Form Integrations <input type="checkbox"/> Tracking Scripts Installed TEST <ul style="list-style-type: none"> <input type="checkbox"/> Test Mobile Version <input type="checkbox"/> Test Opt-in Form <input type="checkbox"/> Test Redirect to Thank You Page 	COPY/DESIGN <ul style="list-style-type: none"> <input type="checkbox"/> Headline <input type="checkbox"/> General Copy <input type="checkbox"/> Call to Action <input type="checkbox"/> Images BUILD <ul style="list-style-type: none"> <input type="checkbox"/> Domain/URL <input type="checkbox"/> Build Elements in Page Builder <input type="checkbox"/> Tracking Scripts Installed TEST <ul style="list-style-type: none"> <input type="checkbox"/> Test Mobile Version <input type="checkbox"/> Test Call to Action Link 	COPY/DESIGN <ul style="list-style-type: none"> <input type="checkbox"/> Headline <input type="checkbox"/> General Copy <input type="checkbox"/> Call to Action <input type="checkbox"/> Images BUILD <ul style="list-style-type: none"> <input type="checkbox"/> Audience Lists <input type="checkbox"/> Build in Email Builder <input type="checkbox"/> Add UTMs <input type="checkbox"/> Download Page Link <input type="checkbox"/> Add Audience to Campaign TEST <ul style="list-style-type: none"> <input type="checkbox"/> Test Mobile Version <input type="checkbox"/> Test Download Page Link <input type="checkbox"/> Send a Test Email 	COPY/DESIGN <ul style="list-style-type: none"> <input type="checkbox"/> Headline <input type="checkbox"/> General Copy <input type="checkbox"/> Call to Action <input type="checkbox"/> Images BUILD <ul style="list-style-type: none"> <input type="checkbox"/> Domain/URL <input type="checkbox"/> Build Elements in Page Builder <input type="checkbox"/> Download Link <input type="checkbox"/> Downloadable File Attached <input type="checkbox"/> Tracking Scripts Installed TEST <ul style="list-style-type: none"> <input type="checkbox"/> Test Mobile Version <input type="checkbox"/> Test Download Link
LEAD MAGNET	INDOC EMAILS (1, 2 & 3)	INDOC EMAILS, CONT.	QUALITY ASSURANCE
BUILD <ul style="list-style-type: none"> <input type="checkbox"/> General Copy <input type="checkbox"/> Images & Design <input type="checkbox"/> Link or Download File for Delivery <input type="checkbox"/> Test Mobile Version 	COPY/DESIGN <ul style="list-style-type: none"> <input type="checkbox"/> Headline <input type="checkbox"/> General Copy <input type="checkbox"/> Call to Action <input type="checkbox"/> Images BUILD <ul style="list-style-type: none"> <input type="checkbox"/> Audience Lists <input type="checkbox"/> Build in Email Builder <input type="checkbox"/> Set Up Email Sequencing 	BUILD, CONTINUED <ul style="list-style-type: none"> <input type="checkbox"/> Add Audience to Campaign <input type="checkbox"/> Add UTMs <input type="checkbox"/> Add Audience to Campaign TEST <ul style="list-style-type: none"> <input type="checkbox"/> Test Mobile Version <input type="checkbox"/> Test Links <input type="checkbox"/> Send a Test Email 	CHECKLIST <ul style="list-style-type: none"> <input type="checkbox"/> Check Mobile Responsiveness <input type="checkbox"/> Check Spelling & Grammar <input type="checkbox"/> Test Email Automations, Redirects, Triggers, Zaps <input type="checkbox"/> Test Purchases <input type="checkbox"/> Check URLs, Meta Descriptions, Favicons <input type="checkbox"/> Test Tracking & Analytics



PRESENT YOUR GAME PLAN

Now that you have completed your research, your funnel map and your checklists, it's time to plan your project timeline and set your client's expectations for how the project will go.

I like to use a 60 Day Project Planner that lays out the entire scope of the project over a two-month calendar so that I can set realistic timelines and expectations... not just for my team, but for my client as well.

You don't want your client to be hounding you constantly during the build, so make sure that you have clear guidelines in place for when they should expect to hear from you and what they should expect to receive every step of the way. Use whatever management tool you like best to manage your client's expectations from the start.

Then it's time to present your game plan to your client.

FUNNEL BLUEPRINT

The Funnel Blueprint is more than just a map of everything you will be doing during the build process – it's also a chance to impress your client with your professional approach to their project and reaffirm their decision to pay a high-ticket fee for your funnel.

And the best part is that it doesn't have to take much time to put together.

Inside of the [FaaStrack Program](#) I give members the exact blueprint template as well as examples of how I used it with my clients, but any professional looking template will do.

Then you are going to compile key information from the client questionnaire, your research and your plan into a single, impressive blueprint that both you and your client can refer to every step of the way.

THE FUNNEL BLUEPRINT

Your Blueprint should have the following sections:

MARKET ANALYSIS

- Your client's Company Profile including background, values, and mission statement
- The Core Product/Service for your funnel with details and price points
- The Perfect Buyer/Dream Client Profile
- The Attractive Character Identity
- The Narrative/Tone of Voice you'll be using for the funnel
- Brief Competitor Analysis of 2-5 Competitors

FUNNEL PLAN

- The Goal you are going to achieve for your client
- The Funnel Map
- A breakdown of each part of the funnel (pages, emails, etc.)

TRAFFIC & CONVERSIONS

- Your Traffic Plan (channels and targeting)
- Your Retargeting Plan (channels and targeting)
- Your Conversions Plan (how you'll optimize their funnel)

You may also want to include your Project Planner or timeline in this presentation, so your client knows exactly what to expect and when to expect it, though if you are going to invite them to use a client management system it isn't necessary.

And that's it!

The Blueprint is an incredibly important part of your delivery arsenal, because once it's done, you have everything you need to do during the build phase mapped out – all you have to do is deliver the funnel.

And if you need to onboard a copywriter or someone to implement tech, you can send them this document and your checklists, and they'll be able to hit the ground running.

FAAS AGENCY TIP

Many of my [FaaStrack Program](#) members actually sell this planning process as a stand-alone Marketing Strategy document, either as lower-cost entry point into their funnel building services or just to help potential clients gain clarity around their businesses.

Once your client has this in their hands, they can leverage it to onboard new team members or other companies that they may work with in the future – and it can convince them to continue to work with you on other projects because you've proven you know their business so well. It's that powerful.



THE FUNNEL BUILD PROCESS

Now that you've delivered your Blueprint to your client and they've signed off on it, it's time to leverage all the plans and checklists you've made and start the funnel building process.

But before you do that, I have one more shortcut to share with you that will templatzize the copy and design parts of your funnel and make them a breeze to create.

Remember earlier when I said you should never build ANYTHING from scratch? I wasn't just talking about your strategy or your funnel maps – I was talking about your entire funnel.

When you were doing all that funnel hacking, you were gathering key insights into how your competitor's successful funnels currently work. And that means you've already got a full roadmap for how to model the

funnel you're building to compete with – and ultimately do better than – your competitor's funnel.

If you follow this process, you're going to have the highest probability of success and you'll be able to move very, very quickly to put your funnel together.

NOTE

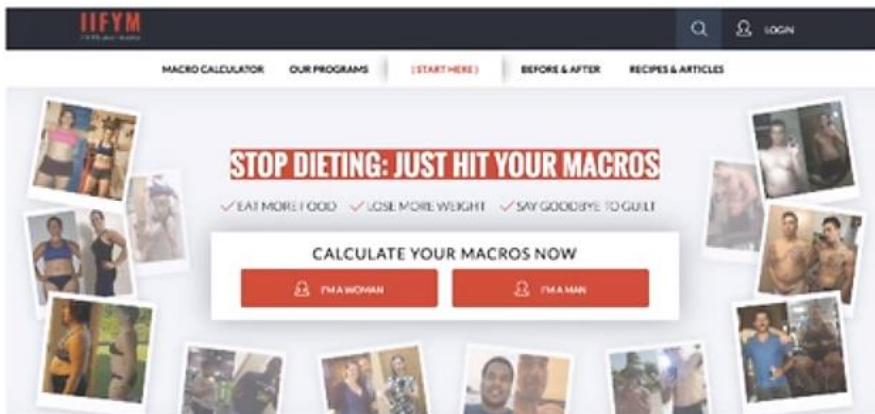
If you missed it earlier, this is actually the fourth piece in a free, six-part masterclass about building Funnels as a Services Agencies that can scale sustainably to 7-Figures and beyond.

If you aren't familiar with all of them, [you can find them here](#).

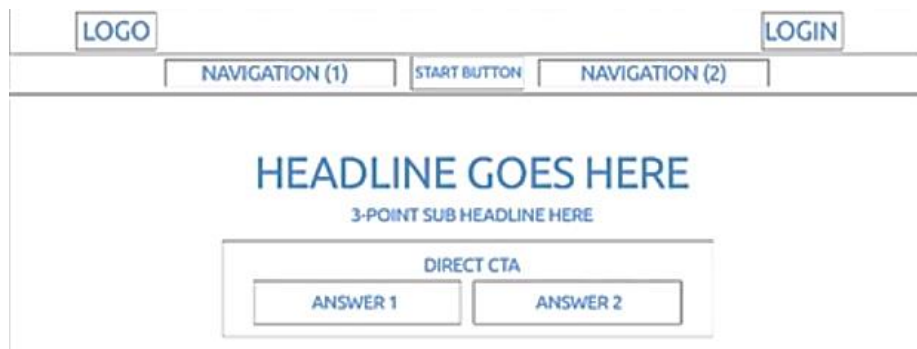
FUNNEL MODELING SHORTCUT

I'm going to use a business I helped scale from \$2500/month to \$5000/day, IIFYM.com, to show you how to model your funnel layout based on an existing successful funnel.

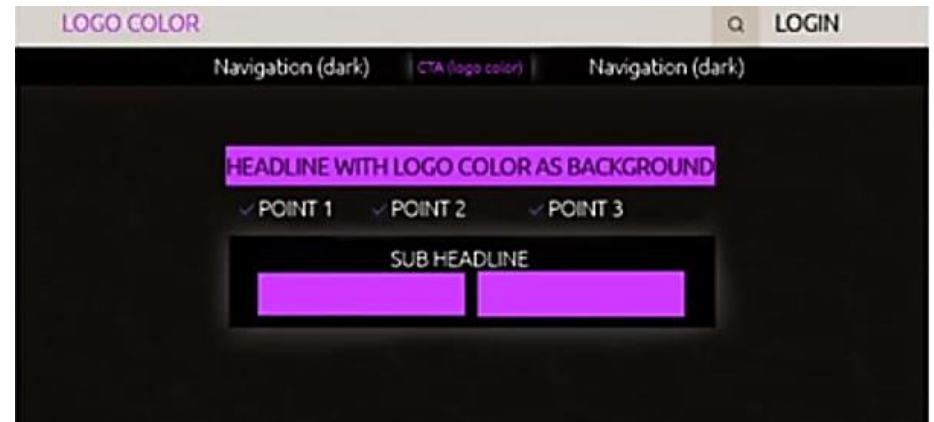
First, you want to create a wireframe based on the model one of your client's competitors uses successfully. Here's a screenshot of the IIFYM homepage, which I would use as a model if I were building a funnel for a different diet and fitness plan client because I know it works.



Break their funnel down into its individual parts – logo, navigation, headline, call to action – and how they're arranged on the page. When you're done, you'll have something like this.



Now I can start adjusting the wireframe elements to fit my current client's brand. I can adjust the layout, move things around, even change to my client's brand colors to make it look different from the competitor funnel while leaving the basic funnel wireframe intact.



The goal here isn't to COPY your competitor's page, it's to use it to inform your own wireframe so your designer never has to start from scratch.

Instead, they can base their design on a successful framework and spend their time and energy making it look professional and reflect your client's service and brand.

You can do the exact same thing with the copy on your competitor's sales page and in their emails.

Again, your goal is not to plagiarize your competitor's copy, it's to break the copy down into the core elements and flow that they are using successfully in their funnel. That way you can use that same template to inform your own copy.

FUNNEL MODELING SHORTCUT

Here's an example of a sales page that someone is already successfully using in their funnel.

There's an important truth in this world that your parents probably didn't tell you when you were growing up

That your teachers never taught you, and that truthfully you probably don't want to know.

You've been tricked into thinking hard work is what determines success.

That the key to wealth and riches, diamonds and sports cars, is to put in your time and do a good job.

That as long as you're a good person, your dream partner will just come walking into your life one day, because that's what you deserve.

I'm sorry to be the one to tell you, you've been sold a lie.

Hollywood movies, school, even your parents have accidentally tricked you into believing the world rewards those who put their head down, work hard, and deserve to be rewarded.

But it doesn't.

That's why you see people who aren't smarter than you getting the jobs that you want (and the money that goes with it)

That's why you see people who aren't better than you getting the dates that you want.

And that's why despite doing all the things you've been told you should do, you haven't been able to get the life you want and dream of.

It isn't just what you know, it's who you know. And it isn't just what you do, it's what others are willing to do FOR you.

If you aren't charismatic, you're going to lose out in life to folks that don't deserve to be beating you. But they will beat you. Again and again.

That's what we learned when Ben didn't get that job offer eleven years ago.

It isn't fair, but deep down we all know that this is how the world works.

THAT is why I created Charisma University

Here it is again, this time broken down with the core pain points, desires, and other information that they use to sell their product.

There's an important truth in this world that your parents probably didn't tell you when you were growing up

That your teachers never taught you, and that truthfully you probably don't want to know.

You've been tricked into thinking hard work is what determines success.

That the key to wealth and riches, diamonds and sports cars, is to put in your time and do a good job.

That as long as you're a good person, your dream partner will just come walking into your life one day, because that's what you deserve.

I'm sorry to be the one to tell you, you've been sold a lie.

Hollywood movies, school, even your parents have accidentally tricked you into believing the world rewards those who put their head down, work hard, and deserve to be rewarded.

But it doesn't.

That's why you see people who aren't smarter than you getting the jobs that you want (and the money that goes with it)

That's why you see people who aren't better than you getting the dates that you want.

And that's why despite doing all the things you've been told you should do, you haven't been able to get the life you want and dream of.

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KEY: PAIN POINTS DESIRES BUSINESS INFO "SECRETS"

Now you can break that structure down even further into a template that looks like this:

You've been tricked into thinking [PAIN POINT] is what determines [DESIRE].

That the key to [DESIRES] is to [PAIN POINTS].

But it doesn't.

That's why you see people who aren't [PAIN POINT] than you getting the [DESIRE] you want and {BONUSES THE DESIRES GIVE}.

That's why you see people who aren't better than you getting [DESIRE] you want.

That's why I created [BUSINESS INFO].

And now you have a template to give to your copywriter so that they can create unique copy that addresses the customer's pain points and desires and speaks to your client's solution.

You can and should do this for every single part of your funnel – opt-in pages, lead magnets, sales pages, email follow ups, video sales letters – if you want to be able to move quickly and have a higher probability of success from the very beginning.

Speaking of giving all of this to a copywriter, there's one more thing I want to talk about...



HOW TO OUTSOURCE WORK AND FIND TEAM MEMBERS

At some point, being able to scale is going to require you letting go of your business and putting parts of it in the hands of other people.

This is where things can get really messy... unless you have systemized your agency to run like an assembly line.

Because if you're building too many types of funnels because you're still selling whatever to whoever, you are going to get in over your head fast even if you have an awesome team to support you.

And if you are going to grow and scale your business sustainably, you're going to need an awesome team to support you.

That's the only way you're going to be able to churn out funnels and get them out the door in an efficient manner – because you'll need to be simultaneously working on copy, design, videos and tech setup across your funnel, with multiple parts being delivered at the same time.

You can't do that by yourself.

Once you have started to scale, you are going to need at least three people on your team to really be able to crank out and deliver completed funnels efficiently:

- 1) A copywriter
- 2) A designer
- 3) A funnel builder

You may also want to hire a Virtual Assistant and/or a Project Manager, depending on where you're at with your business. And eventually you'll also need to hire a Traffic & Optimization Specialist, but not until you're at the traffic part of your funnel.

You can find these people in a lot of places. If you're a [FaaStrack](#) or a [Funnelytics Pro](#) member, you'll be able to find contractors inside the Funnelytics Provider Marketplace by specialty, platform or industry expertise.

If you're not, you're going to need to post a job description – on your website, Upwork, Fiverr, Freelancer.com, Craigslist, Facebook, LinkedIn – and start interviewing candidates for your work.

I don't know how much time you've spent on Upwork or some of the other freelance-based work boards, but let me tell you from experience... **it can be hard to wade through all of the generic digital marketers who will apply for your position, especially if you don't give enough detail in your job post.**

So I highly recommend that you write thorough job descriptions for each of these positions so that you will get higher quality applications and be able to sort through them faster.

NEXT STEPS

That's it! You now know everything you need to know to plan and systemize your delivery so that you can sustainably scale your FaaS Business... without being stressed out or doing it all yourself.

But before you take off, you should know...

The ROI of reading this, nodding along and then just sticking it in a reference folder somewhere and forgetting about it is ZERO. Nada. Nil. The only way things will change in your business is if you do the work to change them.

Speaking of transforming the way you manage your business...

If you want to skip the months (or even years) of figuring out how to systemize your agency and what tools you need to get the job done, you might want to check out the **FaaStrack Program**.

FaaStrack is designed from the ground up to teach you how to systemize your business and get incredible results for your clients while stepping away from the day-to-day... and it provides all the tools, templates and support you need to get to the next level FAST.

It's the ultimate shortcut to scaling your Funnel Marketing Agency.

If you're interested in finding out exactly how FaaStrack can transform your marketing agency, [pop on over to find out more about the program.](#)

Then, if you think it's for you, we'll jump on a call and talk about how FaaStrack could benefit your business.

LEARN MORE ABOUT FAASTRACK

