



Monthly Sales Funnel Check-up

Use this chart each month to review your sales funnel from last month and to make notes to optimize your sales funnel for next month. Use it for your entire business or for individual initiatives.

Business/Initiative Name:	
Date:	Month in Review: (circle one) J F M A M J J A S O N D

Sales Funnel Review and Preview: Use the chart below to briefly record your sales funnel: Include the primary marketing and sales channels used in each stage, the key messages used in each stage, and the approximate number of contacts you had at each stage. Make notes about ideas for next month.

Stages	Last Quarter			Next Quarter
	Channels	Messages	Contacts	Notes
Audience				
Leads				
Prospects				
Customers				
Evangelists				

Aaron Hoos is a writer and strategist who specializes in developing profitable sales funnels. Visit AaronHoos.com.