Lead Generation Funnel Checklist

1. Strategy

Campaign
- ❏ Objectives
- ❏ Target # of Leads, Target Cost Per Lead
- ❏ Current KPIs Traffic, Conv Rate, Cost/Lead
- ❏ Target Market Definition

Budget: $_____

Research
- ❏ Audience Interests, Demographics, Lists
- ❏ Keywords
- ❏ Competitors, Positioning
- ❏ Messaging
- ❏ Website & Social Audit

Funnel Steps
- ❏ Lead Magnets
- ❏ Tripwires
- ❏ Core Offer Product, Service
- ❏ Upsells
- ❏ Promotions, Incentives Discounts, Freebies
- ❏ Guarantees, Assurances Trust Icons, Testimonials

2. Setup

- ❏ Analytics (ie. Google Analytics)
- ❏ Ad Accounts, Pages (Facebook, Google, LinkedIn)
- ❏ CRM HubSpot, MailChimp, ActiveCampaign
- ❏ Lead magnet delivery Zapier, InfusionSoft, …
- ❏ Retargeting & Nurture sequences Emails, Ads

Conversion Tracking
- ❏ Facebook Pixel & Events
- ❏ Google Tag Manager, Analytics, Ads Conversions
- ❏ LinkedIn Insight Tag
- ❏ UTM parameter conventions
- ❏ Hotjar

Landing Pages
- ❏ Landing Pages, Funnels ClickFunnels, Instapage
- ❏ Privacy Policy, Terms of Service
- ❏ Lead Magnet Page
- ❏ Thank You Page, Post-TY Page

Creative
- ❏ Brand guidelines Colors, Logos, Messaging
- ❏ Images, videos, GIFs
- ❏ Copy - headlines, hashtags, emojis
- ❏ Calls-to-action

3. Execution & Optimization

Execution
- ❏ Regular social posts
- ❏ Regular email campaigns
- ❏ Split tests, Rapid Fire Tests
- ❏ Monitor social channels (posts, reviews, comments, messages)
- ❏ Benchmarking & Reporting

Optimization
- ❏ New Ads
- ❏ New Audiences & Lookalikes
- ❏ Add Bid Adjustments - Device, Demographics, Location, Time
- ❏ Social proof top performing ads
- ❏ Conversion rate optimization

4. Analysis & Scale

Analysis
- ❏ Impression frequency per user Audience exhaustion
- ❏ Check CPM (Cost per thousand)
- ❏ Check CTRs (>1%), CPCs (<$1)
- ❏ Session Duration (Check for 0-1s)
- ❏ Page Speeds (Desktop < 5s, Mobile <8s)
- ❏ Test Mobile View, Check for Pop-ups
- ❏ Verify Conversion Tracking & Events
- ❏ Check Facebook Page Quality
- ❏ Google Search Console Warnings & Manual Actions
- ❏ Check Ad comments
- ❏ Check Relevance & Quality Scores
- ❏ Compare Demographics, Devices, Locations
- ❏ Compare Platforms, Placements

Scale
- ❏ Horizontal Scale - Audiences, Placements, Locations
- ❏ Vertical Scale - Ad Budgets
- ❏ Retargeting
- ❏ Additional Niche & 3rd Party Ad Platforms
- ❏ Affiliates, Partnerships