LEAD FUNNEL HEALTH CHECKLIST

Use this checklist to audit your funnel from first contact to conversion, making sure you don't lose qualified prospects along the way.

Awareness (top of funnel)

☐ Clear, compelling messaging on landing pages and ads
☐ Consistent branding across channels
☐ Strong value proposition highlighted in 3 seconds or less
☐ Tracking in place (UTMs, GA4, CRM tags)
☐ Retargeting audiences set up
☐ Lead magnets / offers clearly promoted

Consideration (middle of funnel)

☐ Inquiry confirmation and immediate welcome
☐ Follow-up nurture sequence mapped (see *Inquiry Nurture Framework*!)
☐ Social proof readily available (testimonials, reviews, rankings)
☐ Objection-handling resources (FAQs, comparison charts)
☐ Educational content provided (videos, blogs, webinars, guides)
☐ Personalized outreach processes in place (email or phone)

Intent (lower funnel)

☐ Clear next-step CTAs on every landing page and nurture email
☐ Lead follow-up documented and timely
☐ Form/demo processes tested for ease of use
☐ Pricing /details transparent and easy to access
☐ Relevant tools like ROI calculators, financing options, or cost estimators displayed
☐ Urgency drivers present (limited spots, deadlines, bonuses)

Conversion (bottom of funnel)

☐ Thank-you/confirm messaging for conversions
☐ Welcome/onboarding processes outlined
☐ New customer/client emails ready
☐ Feedback requests on prospect process built in
☐ Cross-sell / upsell opportunities identified for next steps with timing
☐ CRM records updated accurately

Funnel quality checks

☐ Conversion tracking validated (pixel, GA4, CRM)
  ☐ Double-check attribution models match your business goals (first-click vs. last click vs. multi-touch)
☐ Forms tested on mobile and desktop
  ☐ Confirm fields autofill correctly and error messages are clear
☐ Broken links / 404s checked monthly
☐ Accessibility and plain-language review completed with every updated/change
  ☐ Ensure alt text, color contrast, and screen reader compatibility are tested
☐ Data privacy compliance (GDPR, CAN-SPAM, CCPA, etc.) confirmed
☐ Review cookie consent banners and opt-in language
☐ Validate lead scoring and routing rules monthly
☐ Check CRM deduplication rules to avoid duplicate records
☐ Track updates to creative and copy to keep teams aligned with asset version control

Gut-check self audit

☐ Are you losing inquiries before they convert?
  ☐ Check if drop-offs happen after email 1, form fill, or pricing page visits
☐ Is every step of the funnel tracked with trusted and accurate metrics?
☐ Can someone move from "I'm interested" to "I've signed up" without a human if needed?
☐ Do you know which stage is leaking prospects?
  ☐ Use a funnel visualization in GA4 to identify leaks
☐ Are you collecting qualitative feedback?
  ☐ Consistently ask drop-offs why they didn't convert with a short survey
☐ Do all stakeholders know where to look for funnel health data?
☐ Are all dashboards accessible and updated on a regular basis for relevant teams/partners to review and be aware of progress?
☐ Do you keep track of newly released software, features, and releases for all automation and CRM software?