EDGE™ Conversion Efficiency Tracker

Purpose:
Identify where leads drop off in your sales process and take action to improve conversions. Use this tool weekly to spot trends and make adjustments.

Step 1: Define Your Sales Stages

Every business is different, but most sales funnels follow three main stages:

1. **Top of Funnel (Lead Generation & Awareness)**
    - Prospects become aware of your business.
    - Typical activities: website inquiry, ad click, referral, social media interaction.
2. **Middle of Funnel (Qualification & Nurturing)**
    - Prospects show interest, ask questions, or engage with content.
    - Activities: follow-up calls, emails, demos, personalized content.
3. **Bottom of Funnel (Close & Retain)**
    - Leads make a purchase or commit to your service.
    - Activities: proposal delivery, payment processing, onboarding, loyalty follow-up.

Step 2: Track Your Leads

Create a table to record each lead. Suggested columns:

| Lead Name | Contact Date | Stage Entered | Stage Current | Outcome | Notes / Next Steps |

- **Lead Name:** Prospect or company name.
- **Contact Date:** Date they first engaged with your business.
- **Stage Entered:** Where they started in your funnel.
- **Stage Current:** Where they are now.
- **Outcome:** Won, lost, or pending.
- **Notes / Next Steps:** Key insights, follow-up actions, challenges.

Step 3: Weekly Review

At the end of each week:

1. Count how many leads entered each stage.
2. Note how many advanced to the next stage.
3. Identify where most leads are getting stuck.

   Example Insight: If 30 leads entered the middle stage but only 5 advanced to closing, the **follow-up process may need improvement**.

Step 4: Take Action

For each stage where leads stall:

- **Top of Funnel:** Evaluate lead quality, targeting, or messaging.
- **Middle of Funnel:** Improve follow-up speed, personalization, or content.
- **Bottom of Funnel:** Simplify proposals, clarify value, or enhance customer experience.

Step 5: Metrics & KPIs

Track these numbers weekly or monthly:

- **Conversion Rate per Stage:** (Leads advancing ÷ Leads entering stage) × 100
- **Average Time in Stage:** Helps identify bottlenecks
- **Lost Lead Reasons:** Categorize why prospects did not move forward

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Step 6: Optional Visualization

- Use a funnel chart or simple bar chart to visualize how leads progress through each stage.
- Color-code stages: Red = Stalled, Yellow = Needs Attention, Green = Flowing

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Pro Tip:

Consistency is key. Updating this tracker weekly builds clarity and helps you make small, data-driven changes that compound into **higher conversion rates and predictable revenue**.