

| Funnel Stage     | KPI                       | Why It Matters                              |
|------------------|---------------------------|---------------------------------------------|
| Top of Funnel    | Website Traffic           | Indicates brand visibility and reach        |
| Top of Funnel    | Social Reach / Engagement | Measures awareness and brand momentum       |
| Middle of Funnel | Marketing Qualified Leads | Signals lead quality and buyer interest     |
| Middle of Funnel | Email Open + Click Rates  | Measures how engaging your content is       |
| Middle of Funnel | Quote Requests            | Tracks readiness to buy                     |
| Bottom of Funnel | Quote-to-Win Rate         | Tells you how effectively you're converting |
| All Stages       | Cost Per Lead             | Ties marketing to financial efficiency      |
| All Stages       | Marketing-Sourced Revenue | Measures ROI from marketing efforts         |

Who is executing? (which is different from who is accountable for a sales funnel stage)

## Campaign

- ☐ Goal it supports
- ☐ For what funnel stages
- ☐ Time/ dates
- ☐ Channels
- ☐ Budget
- ☐ CTA Call to Action
- ☐ Hook/Magnet (if it applies)
- ☐ Outside costs budget