

**B U S I N E S S**

**PLANNER**

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**IMPROVE SALES &  
MARKETING**

**GOAL GO-GETTERS**









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100% RECYCLED PAPER  
INSPIRE AND ACCOMPLISH

# GOAL GO-GETTERS

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please be kind and return to:

Name

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Phone

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Email

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## JAN

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CALENDAR

LEAD GENERATION

SALES FUNNEL

DIGITAL MARKETING

CUSTOMER EXPERIENCE

TOOLS RESEARCH

# Current Brand Strategy

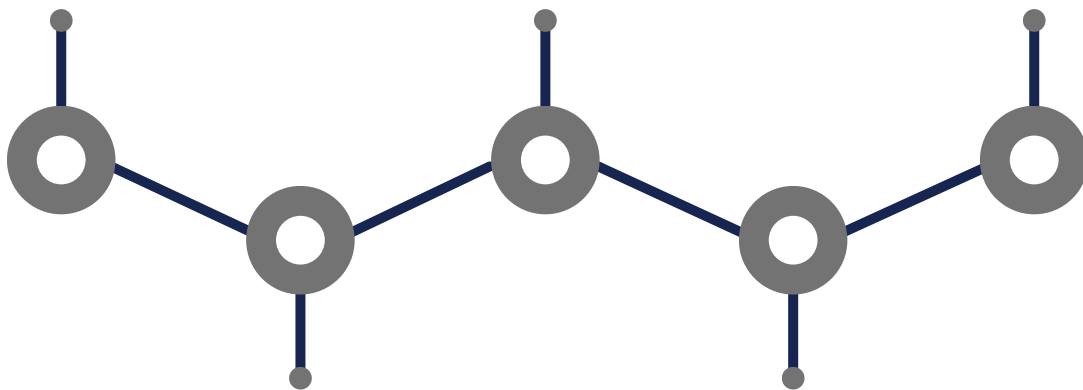
What Purpose Does My Business Serve?

What Customer Experience Do I Want To Provide? What Do I Want My Customers To Feel?

**COMPETENCE**

**EXCITEMENT**

**SINCERITY**



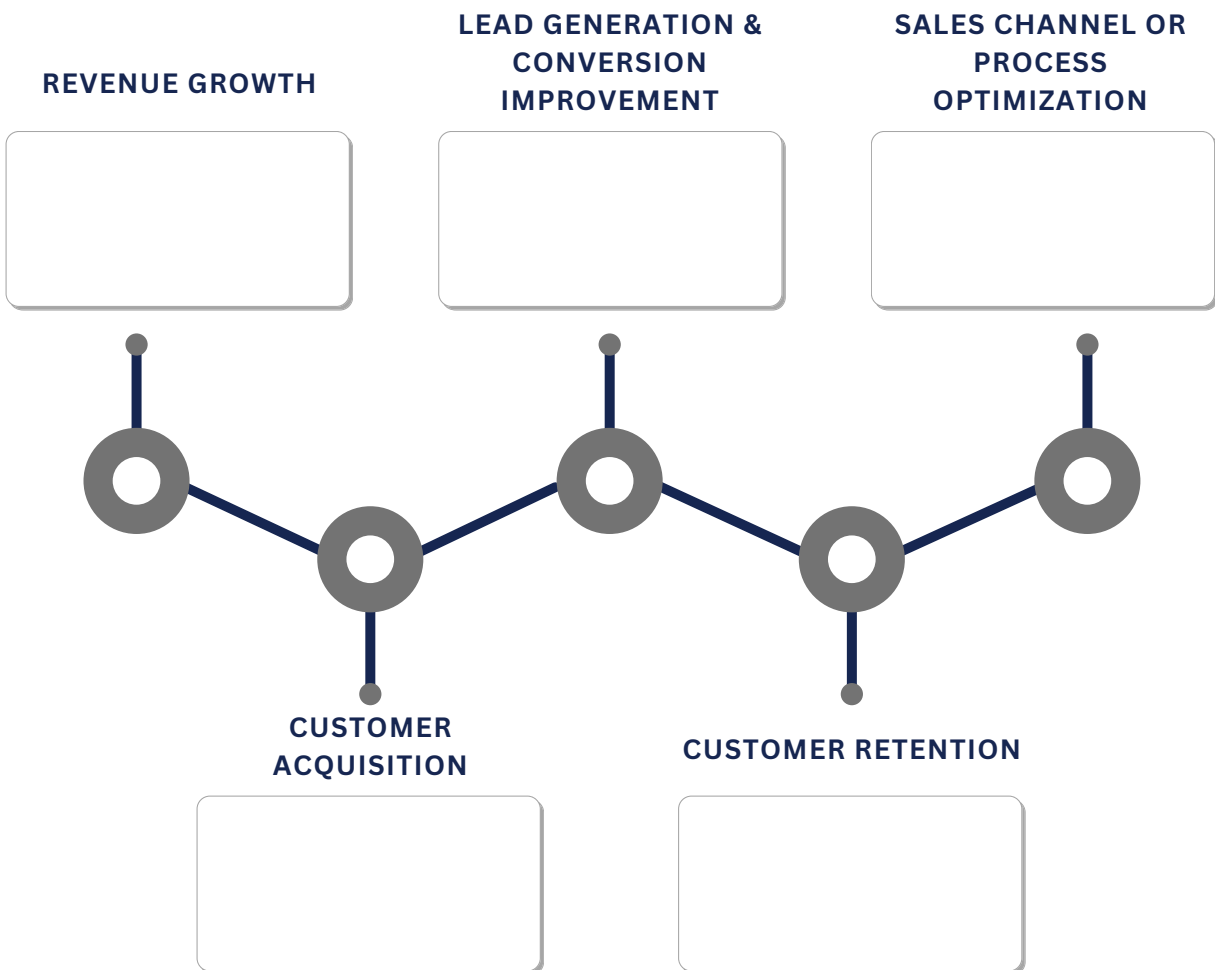
**SOPHISTICATION**

**TOUGHNESS**

# Current Sales Strategy

What Problems Am I Solving for My Customers Through Sales?"

What Am I Trying to Achieve with My Current Sales Approach?



# GOAL PLANNER

**B U S I N E S S**

IMPROVE CONVERSION RATES BY  
OPTIMIZING SALES FUNNELS

**PLANNER**

---

**IMPROVE SALES &  
MARKETING**

# DAILY PLANNER



## INSPIRE

Improve sales funnel conversion rate by 15% within 7 days by optimizing key touchpoints.

## WATER



TOTAL :


## ENERGIZE



## GOAL GO-GETTERS

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 [www.goalgogetters.com](http://www.goalgogetters.com)

 [www.thegoalgetter.com](http://www.thegoalgetter.com)

Welcome to the Goal Go-Getters Team!

## DOODLE

## ENCOURAGEMENT

“Optimizing your funnel is like tuning a high-performance engine – even small tweaks can lead to big results. Every improvement you make brings more clarity, trust, and ease to your customer’s journey.”

## DEFINE

### DAY

### TASK

☐  
**MONDAY**

Review your current sales funnel and identify weak points.

☐  
**TUESDAY**

Improve or simplify your lead magnet, offer, or landing page.

☐  
**WEDNESDAY**

Update or rewrite your sales page copy for clarity and impact.

☐  
**THURSDAY**

Test and refine your email sequence or follow-up messages.

☐  
**FRIDAY**

Add or enhance trust signals (testimonials, guarantees, FAQs).

☐  
**SATURDAY**

Celebrate your wins—big and small! Recognize achievements and share successes with your team.

☐  
**SUNDAY**

Take the day off to rest, reflect on what worked, recharge for the next week, and jot down any new ideas or improvements.

## TOP FOCUS

1

2

3

4

CALENDAR

LEAD GENERATION

SALES FUNNEL

DIGITAL  
MARKETING

CUSTOMER  
EXPERIENCE

TOOLS  
RESEARCH

# ACCOMPLISH



## TOPIC

## SUGGESTED TASKS

### **FUNNEL AUDIT & FIXES**

1. Use Google Analytics or funnel tracking tools to pinpoint high-exit pages.
2. Check for broken links, slow load times, or confusing CTAs in the funnel.
3. Review mobile responsiveness on all funnel pages and email formats.
4. Walk through your entire funnel as a customer and document every friction point.
5. Use a heatmap tool (like Hotjar) to understand how users interact with your site.

### **OFFER CLARITY & MESSAGING**

1. Rewrite your headline to make it clearer, more benefit-focused, or curiosity-driven.
2. Add a short video or animated explainer to your landing or sales page.
3. Use bullet points to simplify and highlight offer benefits.
4. A/B test two variations of your lead magnet or sales page.
5. Update your thank-you page to include a secondary CTA (e.g., next step, limited-time upsell).

### **EMAIL SEQUENCE & FOLLOW-UP**

1. Rewrite your first follow-up email to focus on the customer's problem and solution.
2. Add a case study, review, or testimonial in your email series.
3. Create a clear CTA in every email — link directly to the next step.
4. Add personalization tokens (like first name or location) to increase engagement.
5. Test email subject lines for better open rates (A/B test if possible).

# ACCOMPLISH



CALENDAR

LEAD GENERATION

SALES FUNNEL

DIGITAL  
MARKETING

CUSTOMER  
EXPERIENCE

TOOLS  
RESEARCH

DAY	TASKS
<input type="checkbox"/> MONDAY	
<input type="checkbox"/> TUESDAY	
<input type="checkbox"/> WEDNESDAY	
<input type="checkbox"/> THURSDAY	
<input type="checkbox"/> FRIDAY	
<input type="checkbox"/> SATURDAY	
<input type="checkbox"/> SUNDAY	

## NOTES

[illegible]

# ACCOMPLISH



## STRENGTHS

## ANALYTICS & REPORTING

## NEEDS IMPROVEMENT

## NEXT STEPS

## LEARN

## CELEBRATE / GRATITUDE

CALENDAR

LEAD GENERATION

SALES FUNNEL

DIGITAL  
MARKETING

CUSTOMER  
EXPERIENCE

TOOLS  
RESEARCH

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