

A customer enrollment system is a mechanism that automatically elevates your relationship with those you serve.

It brings them along a journey...

- From initially discovering your business exists (suspects)
- To providing opportunities for them to experience first-hand what your company has to offer (prospects)
- To moments of decision where you invite someone to be your customer (offers)
- To the ongoing process of providing value, deepening relationship, and making a heartfelt impact on the lives of those you serve (satisfied customers and loyal ambassadors).

In this worksheet, you will:

1. Build Your Funnel.
2. Track Enrollment Expenses.

The Customer Enrollment System attracts, engages, educates, enrolls, and re-enrolls an ideal someone who could receive value from your company and solutions.



The Five-Step Funnel

The funnel has four steps. Each step acts as a shepherd moving the potential new customer along a journey.

1. **Shine Your Light:** Utilize top-of-funnel marketing to make your presence known to ideal prospects, like a beacon attracting ships to shore.

Attracts suspects to the top of your funnel.

2. **Deliver Profound Experiences:** Offer valuable, free content or experiences that showcase your service's potential to meet user needs and wishes.

Moves suspects into being prospects.

3. **Make More Invitations that Build Trust:** Provide in-depth insights into your offerings, team, and values to deepen trust and relationship with prospects.

Moves prospects into being qualified prospects.

4. **Ask Them to Be Your Customer:** Extend a personalized invitation to prospects, highlighting the trust and readiness built to convert them to customers.

Moves qualified prospects into being customers! (Whoohoo!)

5. **Connect & Nurture:** Engage and support customers consistently, fostering loyalty and encouraging them to become brand ambassadors.

Moves customers into loyal customers and later into loyal ambassadors.

The Customer Enrollment & Retention Funnel



Step Three– Make Other Invitations that Build Trust

Once you offer a profound experience, the next step is to ask them to take a next step with you. These are invitations that ultimately result in you asking them to be your customer. Here are the three types of invites: (1) invitations to another meeting or function that will better prepare you to propose a customized solution for them; (2) invitations to additional profound experiences that will help them overcome objections and facilitate trust-building; or (3) direct invites for them to be your customer. Suggestions below.

- In the space below, list the methods you use both currently and plan to implement in the future to convert suspects into prospects. Also include all the methods you use to stay-in-touch over time with those you serve, including newsletters, blogs, articles, free webinars, etc.
- Also capture the costs for delivering these methods shown both on a monthly and annualized basis. If a cost is already captured in steps one or two, don't add an additional cost here; leave the cost as \$0.

• Current Methods	Monthly Cost (\$)	Annual Cost (\$)	Future Methods To Implement	Monthly Cost (\$)	Annual Cost (\$)
Total Current Costs (\$):			Total New/Future Costs (\$):		

Invitations can take on a variety of flavors depending on where they are in the decision-making process. Some decisions are quick and can be completed in a few minutes (purchasing a phone app, trying a new hair product on Amazon, or buying a gift in a gift store). Other buying decisions might take considerably more time and be inherently more complex. Tailor your ongoing asks until you feel you have overcome the trust-building hurdles, objections to buying, and recognition that your solution solves their problem.

- Inviting them to another meeting or function.
 - When would you like to meet to discuss this again?
 - Would you like to go to a Yankees game sometime?
 - Would you like to join me for Art Basel in Miami? I have VIP passes for us.
 - Would you like to join my partner and me for a weekend golf experience at Pebble Beach?
 - We are hosting an event at Big Sky with a handful of our clients. Would you and your partner like to join?

- When can we have another meeting with the other decision maker (your partner, your spouse, your client)?
 - I'd like to invite you to come meet with my production/engineering/product team. Let's look at the calendar and set up a date.
 - When would be a good time for me to come speak to your leadership team?
- Additional profound experiences.
 - Have you read our whitepaper on Selecting a Software Solution?
 - Did you read the blog on ways to improve cash flow?
 - Did you watch the TedX delivered by our product engineer?
 - Could I schedule a time to put together a more customized demo of our product?
 - I would love the opportunity to have my team come visit you and craft a proposal.

Step Four – Invite Them to be Your Customer

Once you offer a profound experience, the next step is to ask them to take a next step with you. These are invitations that ultimately result in you asking them to be your customer. Here are the three types of invites: (1) invitations to another meeting or function that will better prepare you to propose a customized solution for them; (2) invitations to additional profound experiences that will help them overcome objections and facilitate trust-building; or (3) direct invites for them to be your customer.

- In the space below, list the methods you use both currently and plan to implement in the future to convert prospects into new customers.
- Also capture the costs for delivering these methods shown both on a monthly and annualized basis. If a cost is already captured in steps one, two, or three, don't add an additional cost here; leave the cost as \$0.

• Current Methods	Monthly Cost (\$)	Annual Cost (\$)	Future Methods To Implement	Monthly Cost (\$)	Annual Cost (\$)
Total Current Costs (\$):			Total New/Future Costs (\$):		

- Directly asking a prospect to be your customer.
 - When would you like to get started?
 - How can I support you from here?
 - Are you ready to be my client?
 - Are you ready to get started?
 - Here is a link to register.

Now that you have a customer, the work of building your relationship with them and delivering more and more value begins. To help you do this, consider the methods you use now, or plan to use in the future to support these important programs: (1) Customer Retention, (2) Customer Success, (3) Customer Satisfaction; and (4) Customer Engagement.

- | Current Methods | Monthly Cost (\$) | Annual Cost (\$) | Future Methods To Implement | Monthly Cost (\$) | Annual Cost (\$) |
|---------------------------|-------------------|------------------|------------------------------|-------------------|------------------|
| | | | | | |
| Total Current Costs (\$): | | | Total New/Future Costs (\$): | | |

- New Customer Onboarding Program
- Newsletters
- Customer Surveys
- 90-Day Customer Success Programs
- Client Success Manager
- Weekly Training Emails

Step Six – Make the Journey Visible

You've done the deep work—crafting each stage of your Customer Enrollment & Retention Funnel. Now it's time to zoom out and bring it all into one clear, compelling view.

This final step is about alignment. When your team can see the full journey—from **suspect** to **prospect**, to **customer**, to **satisfied customer**, to **loyal ambassador**—you empower everyone to take part in growing the business with confidence, consistency, and heart.

Instructions – On the next page:

- **List every method you currently use**—or plan to use—in each stage of the funnel.
- **Bold or highlight current methods** so your team knows what's already in place.
- **Leave future ideas unhighlighted** to signal what's next.

This visual clarity turns your customer journey into a shared strategy—and your funnel into a living engine for impact, scale, and profit.

Your Customer Enrollment & Retention Funnel

1 – Shine Your Light – Channels
How You Turn Suspects to Prospects

2 – Deliver Profound Experiences – Methods
How You Turn Prospects to Qualified Prospects

3 – Ask Them to Be Your Customer – Methods
How You Turn Qualified Prospects to Customers

4 – Connect & Nurture – Methods
How You Turn Customers to Satisfied Customers and Loyal Ambassadors

Congratulations! You’ve just designed your Customer Enrollment & Retention!
Add the key details to your [4-Page Growth Plan](#) now!

PART TWO – TRACK ENROLLMENT EXPENSES

Use the space below to add up the total costs of your Customer Enrollment Funnel from the steps above, on both a monthly basis and an annualized basis. Knowing your total funnel costs on a monthly and annual basis will help you later on in calculating the efficiency of your funnel and seeing ways to improve it over time.

Enrollment Stage	Current Monthly	Current Annual	New Monthly	New Annual	Total Future Monthly	Total Future Annual
1-Shine Your Light						
2-Deliver Profound Experiences						
3- Ask Them to be Customer						
4 – Connect & Nurture						
TOTAL COSTS:						