

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

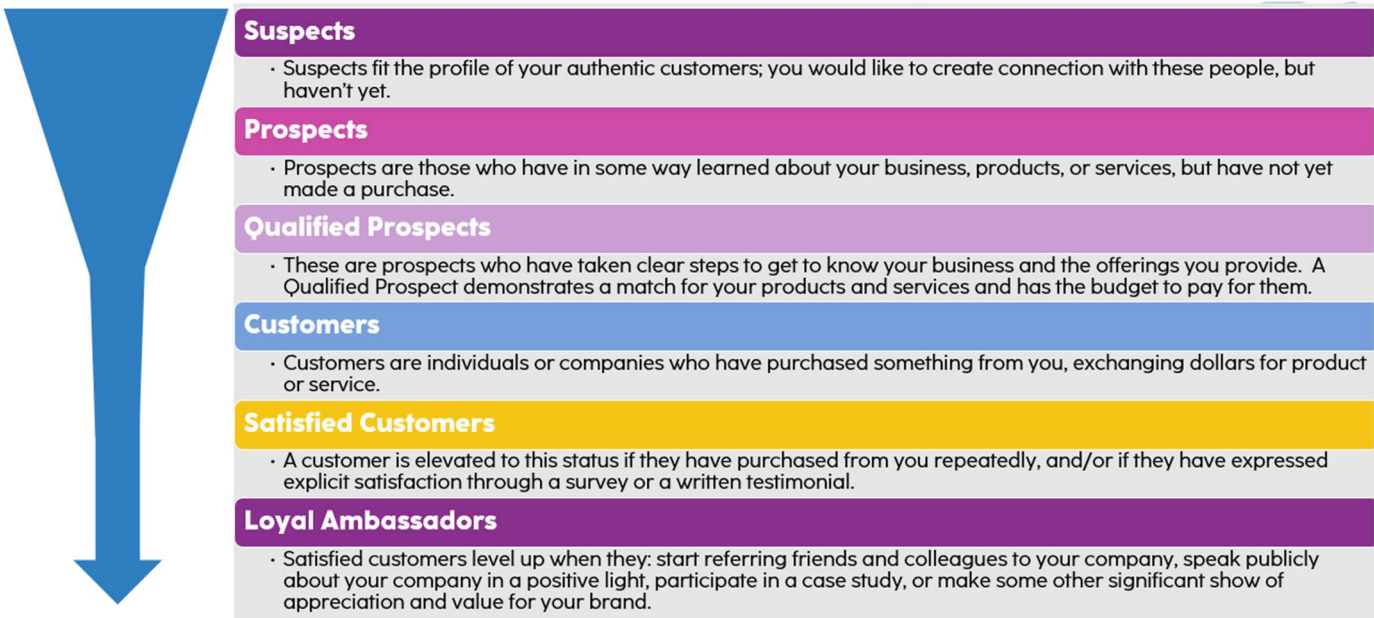
It brings them along a journey...

- 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



PART ONE – BUILD YOUR FUNNEL

Step One – Shine Your Light

In this first step, a suspect becomes aware of your business. Like a lighthouse, you create intentional opportunities for people to discover your company.

- In the space below, list the methods you use both currently and plan to implement in the future to attract suspects into your funnel. Examples below.
- Also capture the costs for delivering these methods monthly and annually.

Current Methods	Monthly Cost (\$)	Annual Cost (\$)	Future Methods To Implement	Monthly Cost (\$)	Annual Cost (\$)
LinkedIn Ads targeting CFOs in mid-sized bank	\$3,500	\$42,000	Sponsoring key fintech/finance events (e.g., Money20/20)	\$6,000	\$72,000
SEO optimization & blog content on integration trends	\$1,200	\$14,200	Paid placements in industry newsletters (e.g., American Banker)	\$1,000	\$12,000
Speaking slots at regional banking conferences (travel & fees)	\$2,000	\$24,000	Strategic podcast sponsorship (finance tech shows)	\$1,500	\$18,000
Referral partner incentive program	\$1,000	\$12,000	Outdoor/transit ads near target HQ clusters	\$3,000	\$36,000
Sponsorship of state-level banking association	\$800	\$9,600	Co-marketing campaigns with integration partners	\$2,000	\$24,000
Total Current Costs (\$):	\$8,500	\$102,000	Total New/Future Costs (\$):	\$13,500	\$162,000

Example Methods:

- Online paid ads.
- Social media ads.
- Social media organic campaigns.
- Radio or television spot.
- Billboard ad.
- Podcast advertising.
- Magazine, newspaper, or trade publication ad.
- Retail space in a high-traffic area or mall.
- Purchased mailing list with mail or postcard campaign.
- Purchased call list with outbound call campaign.
- Social media ads.
- Speaking at events.
- Sponsoring events or associations.
- Search engine optimization.
- Affiliate campaigns.
- Referral relationships.
- Networking groups.

These are the “shine your light” channels that sit at the top of your Marketing Enrollment Funnel. Most businesses have several channels operating at once, attracting those you long to serve to discover your company. Notice that some channels are more personalized and will likely yield higher results, while others are more passive but might have the ability to reach more individuals.

Customer Enrollment and Retention Funnel Designer™

Example: ABC integration Company



Step Two – Deliver Profound Experiences

Step two is where you (1) give them a way to sign-up for the free profound experience in exchange for their contact information; and (2) give them an unforgettable, meaningful experience that will help them understand the value to your solutions offer them.

- In the space below, list the methods you use both currently and plan to implement in the future to convert suspects into prospects. Examples below
- Also capture the costs for delivering these methods shown both on a monthly and annualized basis. If the cost is already covered in step one, don't add an additional cost here.

Current Methods	Monthly Cost (\$)	Annual Cost (\$)	Future Methods To Implement	Monthly Cost (\$)	Annual Cost (\$)
Free Integration Audit (includes light IT assessment)	\$0	\$0	VIP half-day integration workshop for select prospects	\$1,500	\$18,000
Personalized demo environments for each prospect	\$500	\$6,000	Limited-time free API sandbox access	\$300	\$3,600
Custom ROI calculators (outsourced design)	\$250	\$3,000	"Executive Insight" eBook with case studies (outsourced writing/design)	\$400	\$4,800
Invite-only virtual roundtables with current CFO clients	\$300	\$3,600	On-site "proof of concept" builds for top 3 prospects annually	\$1,000	\$12,000
Total Current Costs (\$):	\$1,050	\$12,600	Total New/Future Costs (\$):	\$3,200	\$38,400

Example Methods:

- Trails or samples (though you might have more than one type of free sample or free trial).
- Consultations.
- Screenings.
- Virtual programs.
- Events.
- Assessments.
- Book or eBook.
- Access to a coveted list that would be hard to find and valuable to have.
- A specialized, limited experience. (VIP type experience)
- Early access to something coveted and limited.
- Personalized information gathering and proposal(s).
- Customized design and presentation of a solution.
- A customized demonstration or mock-up of a product or service you could provide.

Deliver quality offerings that foster connection and understanding by generously providing substantial value. Create a remarkable, memorable experience that serves their needs in an innovative way, encouraging virality. Be succinct, offering quick yet satisfying experiences that respect the prospect's time. Clearly showcase a solution to their needs, highlighting the ease and effectiveness of your solution to ensure they leave wanting more.

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 (\$)
Quarterly thought-leadership webinars (Zoom + promotion)	\$300	\$3,600	Private benchmarking reports comparing peer institutions	\$500	\$6,000
Monthly industry insight email series	\$0	\$0	"VIP Client + Prospect" networking dinners	\$1,000	\$12,000
Whitepaper distribution to engaged prospects	\$0	\$0	Invite-only CFO summits in partnership with bank associations	\$2,500	\$30,000
Total Current Costs (\$):	\$300	\$3,600	Total New/Future Costs (\$):	\$4,000	\$48,000

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 (\$)
Customized proposal decks	\$0	\$0	"Decision-maker Concierge" service (outsourced admin for scheduling multi-party demos)	\$400	\$4,800
Contract signing incentives (e.g., onboarding fee waiver promos)	\$0	\$0	Celebration packages for new customers (branded + luxury gift)	\$250	\$3,000
Total Current Costs (\$):	\$0	\$0	Total New/Future Costs (\$):	\$650	\$7,800

- 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.

Step Five – Connect & Nurture

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.

- In the space below, list the methods you use both currently and plan to implement in the future to elevate new customers into satisfied customers and loyal ambassadors.
- 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, three, or four 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 (\$)
90-day onboarding success program (digital materials & welcome kit)	\$200	\$2,400	Annual customer innovation day (venue + catering)	\$2,000	\$24,000
Quarterly customer advisory board meetings	\$500	\$6,000	Ongoing customer video testimonials (outsourced filming)	\$1,000	\$12,000
Annual NPS survey with follow-up "success call"	\$0	\$0	Exclusive customer community platform (tech + moderation)	\$500	\$6,000
Total Current Costs (\$):	\$700	\$8,400	Total New/Future Costs (\$):	\$3,500	\$42,000

Examples:

- 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

LinkedIn Ads targeting CFOs in mid-sized banks | SEO optimization & blog content on integration trends
Speaking slots at regional banking conferences | Referral partner incentive program
Sponsorship of state-level banking association

Sponsoring key fintech/finance events (e.g., Money20/20) | Paid placements in industry newsletters (e.g., American Banker) | Strategic podcast sponsorship (finance tech shows) | Outdoor/transit ads near target HQ clusters
Co-marketing campaigns with integration partners

2 – Deliver Profound Experiences – Methods

How You Turn Prospects to Qualified Prospects

Free Integration Audit (includes light IT assessment) | Personalized demo environments for each prospect
Custom ROI calculators (outsourced design) | Invite-only virtual roundtables with current CFO clients

VIP half-day integration workshop for select prospects | Limited-time free API sandbox access
"Executive Insight" eBook with case studies (outsourced writing/design) | On-site "proof of concept" builds for top 3 prospects annually

3 – Make Other Invitations that Build Trust

How You Turn Qualified Prospects to Very Qualified Prospects

Quarterly thought-leadership webinars (Zoom + promotion) | Monthly industry insight email series
Whitepaper distribution to engaged prospects

Private benchmarking reports comparing peer institutions
"VIP Client + Prospect" networking dinners | Invite-only CFO summits in partnership with bank associations

4 – Ask Them to Be Your Customer – Methods

How You Turn Very Qualified Prospects to Customers

Customized proposal decks | Contract signing incentives (e.g., onboarding fee waiver promos)

"Decision-maker Concierge" service (outsourced admin for scheduling multi-party demos) | Celebration packages for new customers (branded + luxury gift)

5 – Connect & Nurture – Methods

How You Turn Customers to Satisfied Customers and Loyal Ambassadors

90-day onboarding success program (digital materials & welcome kit) | Quarterly customer advisory board meetings | Annual NPS survey with follow-up "success call"

Annual customer innovation day (venue + catering)
Ongoing customer video testimonials (outsourced filming) | Exclusive customer community platform (tech + moderation)

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	\$8,500	\$102,000	\$13,500	\$162,000	\$22,000	\$264,000
2-Deliver Profound Experiences	\$1,050	\$12,600	\$3,2300	\$38,400	\$4,250	\$51,000
3 – Make Other Invitations	\$300	\$3,600	\$4,000	\$48,000	\$4,200	\$51,600
4- Ask Them to be Customer	\$0	\$0	\$650	\$7,800	\$650	\$7,800
5 – Connect & Nurture	\$700	\$8,400	\$3,500	\$42,000	\$4,200	\$50,400
TOTAL COSTS:	\$10,550	\$126,600	\$24,850	\$298,200	\$35,400	\$424,800