Sales funnel measurement *plan*



We define six funnel stages, events and reporting rules for one sales process.

Who it helps

SME managers and reporting teams

The problem to solve

A sales funnel can conceal leakage when stage changes are recorded at different moments by different teams.

Working through the brief

1. **Map the current sales process**

   Gather the agreed inputs. Your business questions, reporting examples and measure owners.

2. **Define six stage events**

   Track “Funnel stage” and “Qualifying event” together so the reviewer can connect the source information to the result.

3. **Specify reporting rules**

   Use the plan to establish which event moves a record between stages and check reporting consistency.

4. **Check the scope at handover**

   Licences, hosting and extra data sources require separate agreement.

Worked example

A visitor can restart checkout. Define when repeated events count once before comparing funnel stages.

Read the service scope / DAT-004

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