



Leading Digital Marketing Strategist, Funnel Geek
Katie Joy presents...

AI FUNNEL *Secrets*

**Harness AI to Map Out Your
Passive Income Funnel
in Half the Time**

Co-create an automated system for you to grow
your business with support, ease and joy.



PASSIVE INCOME FUNNEL MAPPING

Welcome to Passive Income funnel mapping. The objective is for you to get clarity on what funnel you want to build!

My name is Katie Joy I'm a Digital Marketing Strategist, proud single mama, and Australian polyglot (fancy word to say I speak several languages).



I love to put 'Australian' in there as we can't walk across borders of any other countries, so it's rare for us to speak many languages!

I left a career in International Aid & Development when my first son passed away, then my partner and I became accidental 6-figure entrepreneurs in the fitness industry! But it wasn't until I moved to Bali as a single mum with two kids under 6, that I started ALL OVER again, and HAD to figure out this online thing to have the freedom and flexibility to raise them! Since then I went from \$17 hour as an online English teacher to selling 2 - 30K packages online.

What's most relevant to you is that I am a certified full-stack digital marketer and Founder of Digital Entrepreneur where we help small businesses to win back time with automation.

My passion is helping mums with their funnels and automation and I absolutely love to brainstorm your next freebie, offer, or digital product bundle!

Look forward to helping you on your journey.

**Want to connect? Join my facebook group: [Powerful Online Business Mamas](#)
Or send me a message on Instagram: [@katiejoyous](#)**

Prefer to write in google docs?

[Copy to google drive](#)



EXECUTIVE SUMMARY

Watch the training and complete the workbook then return here and list out your ideas for your funnel. This will be a summary from section 3.1 - 3.5. You don't need to START with everything. This is phased plan, and each phase may require different funnels. For your passive income funnel you only need a strategic freebie and a digital product.

My Funnel Plan

Product	Offer Price	Considerations
My Strategic Freebie is:	FREE	PRE PRODUCT for new (cold lead) Does not have trust yet or know what you do
My Low Priced Offer is:	Enter price eg: \$7, \$9, \$12, \$17, \$37, \$47, \$12, \$77 - up to around \$200	Put your best foot forward. Offer a highly valuable no-brainer offer to amaze and delight! Note: ideally needs to be 1-time cost (memberships are harder to sell as it involves a longer commitment and some know-like-trust).
My Core Product is:	Signature or Core Offer \$200-\$2500	They know more about you and are very seriously considering your offers. Often requires some kind of event, eg. challenge, masterclass, and time pressure to sell. You can also sell via DMs and emails.
My Post Product is:	High-ticket \$2500+ Or Ongoing Membership (think of lifetime value)	Has a lot of trust and will invest in your higher priced offers or ongoing offers such as an alumni membership Often requires a phone call and touch points prior to the phone call to build trust. Often a natural progression from your CORE offer.

GETTING READY: YOUR VISION

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MAP OUT YOUR VISION

Who do you want to BECOME?

What is your new identity? What beliefs do you need to change to shift into this new vision of you and your life?

A large empty rectangular box with a black border, intended for the user to write their response to the question "What is your new identity? What beliefs do you need to change to shift into this new vision of you and your life?".

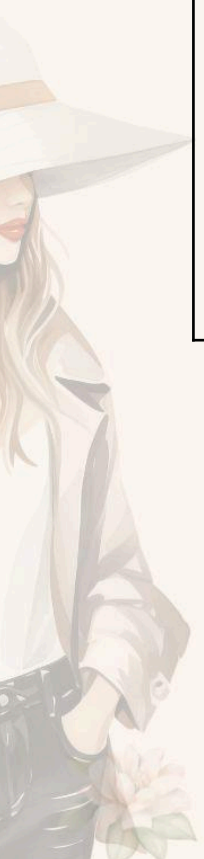
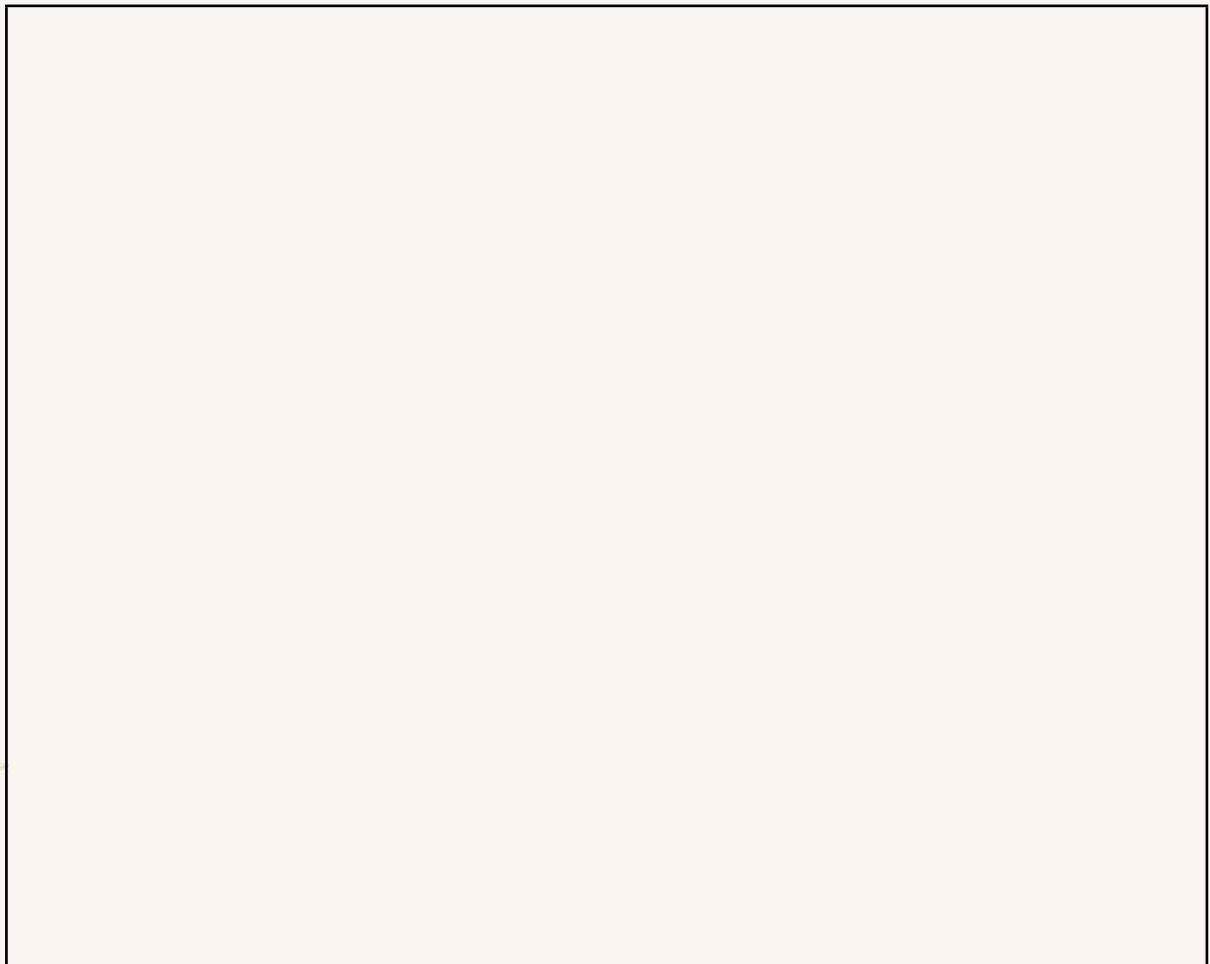
Where do you want to be in the next 2-3 months?

What do you want to achieve?



Here are some examples:

- Expand your membership by 10 vibrant souls.
- Celebrate 5 sales of your online program.
- Immerse in meaningful connections and build relationships, while doing the things that bring you JOY, while passive income sales come in while you sleep!
- Understand which tech tools are right for you (eg. move everything into an all-in-one platform).
- Have an email marketing nurture sequence that **actually** converts.
- Book 5 sales calls every week for your program and know your conversion rate



1. SALES FUNNEL STRATEGY

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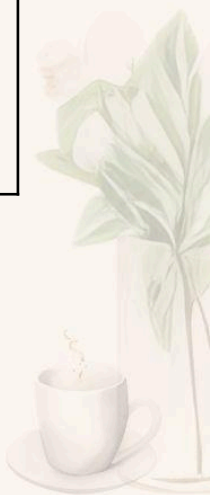
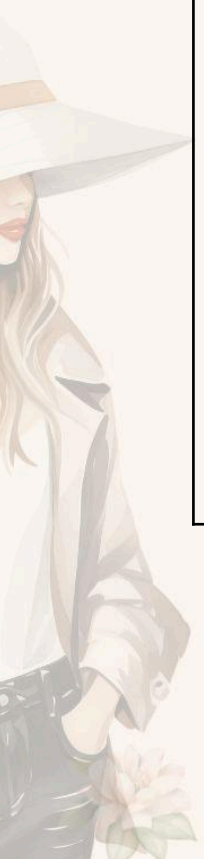
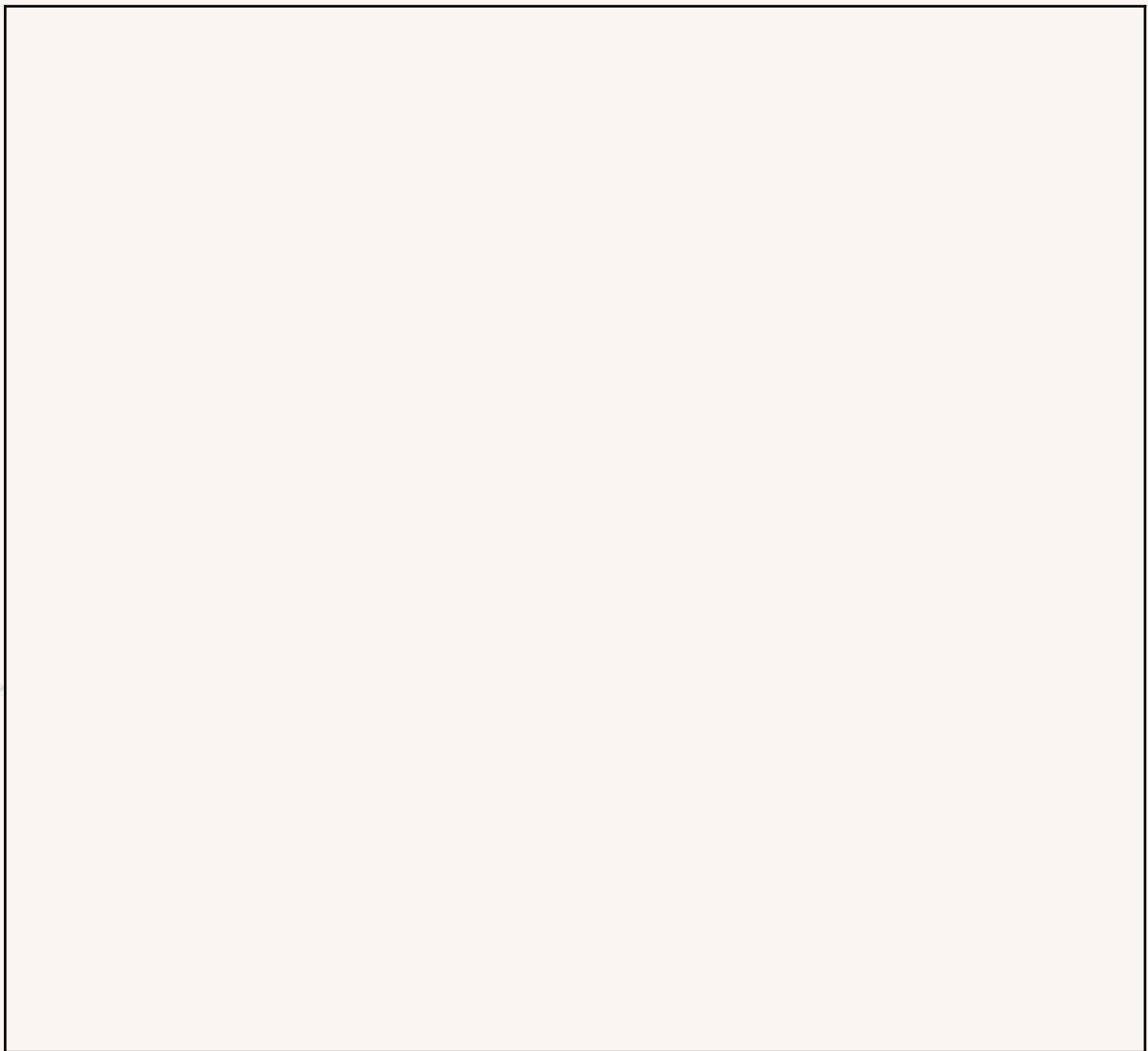
ACTION ITEM: LIST YOUR CURRENT DIGITAL ASSETS

Make a list of all the digital assets you have available, no matter how big or small.

Here are some examples:

- Lead Magnet PDF
- Video Training Series
- Customizable Templates for Various Needs
- Asana/Trello Project Management Boards
- Curated Library of Images/Copy/Examples/Inspiration
- Exclusive "Little Black Book" of Industry Secrets
- Comprehensive Online Course
- Recorded Live Group Course Sessions
- Documented Strategy Guides
- Exclusive Membership Group
- Interactive Quizzes or Assessments
- E-Books on Niche Topics
- Email Course Sequence
- Podcast Series on Industry Insights
- Checklists and Worksheets
- Swipe Files for Copywriting

- Webinar Recordings
- Social Media Content Calendar
- Brand Style Guide Template
- Infographics and Data Visualizations
- SEO Keyword Research Pack
- Case Studies and Success Stories
- Virtual Summit Recordings
- Client Testimonial Compilation
- Digital Journal or Planner
- Resource List of Tools and Services
- Mobile App for Niche-Related Content
- Recipe or DIY Project Collection (for relevant niches)
- Toolkit for Startups/Entrepreneurs



2. LEVERAGING AI TO LAUNCH FASTER

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ACTION ITEM: AI DRIVEN TARGETING

We want to align your funnel toward your vision in step 1. Now we'll focus on your ideal client and message to market match.

List out:

- Their top 5 fears/frustrations (or ask chatGPT)
- Their top 5 hopes/desires

And, just in case you haven't done this work before, I will give you an example.

For example:

ChatGPT Prompt: Give me all the pain points for a coach or consultant who is only working 1:1 with clients but wants to scale

Pain points

- **Limited Time:** The most significant constraint is time. There are only so many hours in a day to work with clients, making it difficult to increase income without overworking or raising prices significantly.

- **Income Plateau:** Directly tied to the limitation of time, income eventually hits a ceiling. Without the ability to take on more clients, scaling income becomes a challenge.
- **Burnout Risk:** Constantly managing and delivering personalized services to clients can lead to burnout, especially without the buffer of a scalable product or system.
- **Client Dependence:** Heavy reliance on a small number of high-paying clients can pose a risk. Losing even a single client can significantly impact income.
- **Inefficiency in Delivering Value:** Repetitively teaching or consulting on the same topics for different clients can feel inefficient and like a missed opportunity for broader impact.
- **Difficulty in Taking Time Off:** Being the primary (or sole) service provider means that taking time off can lead to income loss, making vacations or breaks stressful to plan.
- **Challenges in Marketing and Client Acquisition:** Continuous effort is needed to attract new 1:1 clients, which can be time-consuming and detract from service delivery.
- **Limited Reach and Impact:** Working exclusively 1:1 limits the number of people a coach or consultant can help, potentially capping their professional fulfillment and contribution to their field.
- **Operational Bottlenecks:** Administrative and backend tasks related to managing multiple 1:1 client engagements can become overwhelming, taking time away from core coaching or consulting activities.
- **Scaling Costs:** The cost of scaling a 1:1 service model can be prohibitive, as it often means hiring additional staff or freelancers, which not all coaches or consultants are prepared or willing to manage.
- **Technology and Systems Overwhelm:** The thought of leveraging technology to scale (e.g., creating an online course or membership site) can be daunting for those not tech-savvy.
- **Quality Control Concerns:** Worries about maintaining the high quality of personalized service at scale, especially if considering group programs or courses.

- **Market Saturation Fears:** Concerns about entering a potentially crowded online education market with scalable products like courses or group programs.
- **Imposter Syndrome:** Doubting one's ability to create valuable scalable products or worrying that their 1:1 service success won't translate into a scalable model.
- **Financial Uncertainty:** Fear of the initial financial investment required to develop and market scalable products without immediate returns.
- **Transition Strategy:** Uncertainty about how to transition from a 1:1 model to a scalable model while maintaining current client relationships and income levels.
- **Product Development Knowledge:** Lack of experience or knowledge in creating scalable products, such as online courses, from existing 1:1 service offerings.

Addressing these pain points requires strategic planning, leveraging technology, and often a mindset shift towards the value of scalable products and services. Coaches and consultants looking to scale need to explore ways to productize their expertise, automate systems, and potentially diversify their service offerings to mitigate these challenges.

ChatGPT Prompt: Give me all the hopes and desires for a coach or consultant who is only working 1:1 with clients but wants to scale

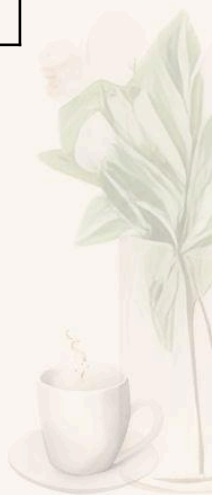
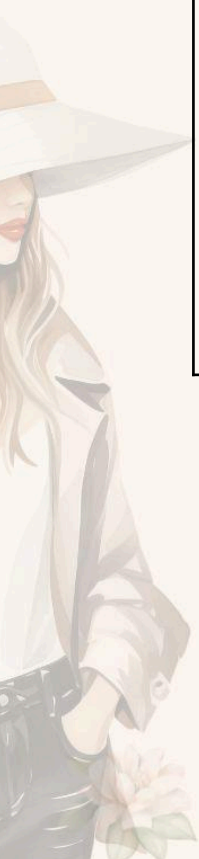
Desires

- **Increased Income with Less Direct Time Investment:** To generate more revenue through scalable offerings that don't require a linear time commitment, thereby breaking the time-for-money trade.
- **Wider Impact and Reach:** To touch the lives of more people by extending their expertise beyond the 1:1 model, making a more significant difference in their field or niche.
- **Greater Flexibility and Freedom:** The desire for a more flexible schedule that allows for travel, hobbies, and quality time with loved ones without income taking a hit.
- **Passive Income Streams:** To develop and sell digital products or courses that bring in revenue around the clock, offering financial stability and security.

- **Automated Systems for Client Acquisition and Service Delivery:** To implement technology and systems that automate marketing, sales, and even some aspects of service delivery, reducing the manual workload.
- **Enhanced Personal Brand and Authority:** To be recognized as a leading authority in their niche, leveraging scalable offerings as a platform to share their message more broadly.
- **Leveraging Content to Scale:** To create evergreen content (like courses, books, or membership sites) that continuously attracts new clients and serves existing ones, multiplying their impact.
- **Community Building:** To cultivate an engaged community or tribe that not only supports their business growth but also fosters peer-to-peer support and learning among members.
- **Operational Efficiency:** To streamline operations, potentially through delegation or automation, so they can focus more on their zone of genius and less on administrative tasks.
- **Higher Profit Margins:** To increase profitability by reducing the reliance on 1:1 time investment and exploring higher-margin scalable products and services.
- **Professional Fulfillment:** To achieve a sense of fulfillment by innovating within their field and contributing to their industry in a meaningful, scalable way.
- **Sustainability and Longevity:** To build a business model that is sustainable in the long term, reducing burnout and ensuring they can continue to serve their market for years to come.
- **Seamless Product or Service Evolution:** To develop a clear pathway for clients to follow, from entry-level products to premium offerings, ensuring client growth alongside business growth.
- **Quality of Life:** To improve overall quality of life by achieving a better work-life balance, with more time for personal interests, wellness, and family.
- **Residual Impact:** To leave a lasting impact on their field, knowing that their work continues to influence and help people, even when they are not actively working.

These hopes and desires guide the strategic decisions coaches and consultants make as they seek to scale their businesses. They underscore the importance of designing a business model that not only meets financial goals but also aligns with personal values and lifestyle aspirations.

Now it's your turn to write yours for your ideal client:



3. CRAFTING YOUR PASSIVE INCOME FUNNEL

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MAP OUT YOUR PRODUCT SUITE

You don't need a product suite when you're getting started. You just need to solve ONE problem with ONE offer, however it's good idea to map one out as it helps visualise the client journey, your business roadmap and how you can help a person at each stage. Basically you will always have something to sell to a person who joins your world if they are a perfect match client.

Table 1

Buyers Journey & Product Type	Offer Price	Considerations
PRE PRODUCT New (cold lead) Does not have trust yet or know what you do	Low ticket: \$7, \$9, \$12, \$17, \$37, \$47, \$12, \$77 - up to around \$200	Put your best foot forward. Offer a highly valuable no-brainer offer to amaze and delight! Note: ideally needs to be 1-time cost (memberships are harder to sell as it involves a longer commitment and

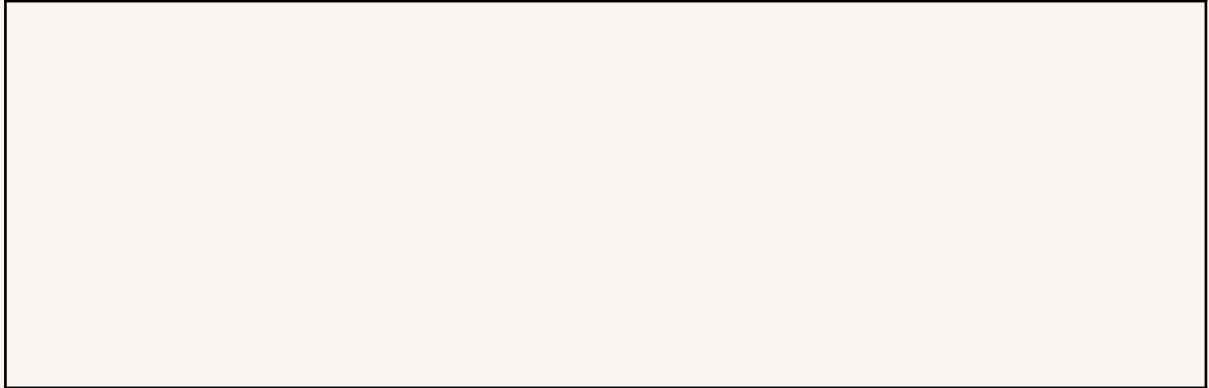
		some know-like-trust). FUNNEL BUILD: Low ticket or tripwire passive income funnel.
CORE PRODUCT Know you and is very seriously considering your offers	Signature Offer \$200-\$2500	Requires some kind of event, eg. challenge, masterclass, and time pressure to sell. You can also sell via DMs and emails. FUNNEL BUILD: Masterclass, mini series or challenge funnel
POST PRODUCT Has a lot of trust and will invest in your higher priced offers or ongoing offers such an alumni membership	High-ticket \$2500+ Or Ongoing Membership (think of lifetime value)	Often requires a phone call and touch points prior to the phone call to build trust. FUNNEL BUILD: Calendar booking funnel. Can be natural progression from your CORE offer.

There is a bunch of funnel lingo and terminology and funnel 'experts' often argue over what means what so I'll do my best to explain:

- 1) **Low-priced offer funnel** otherwise known as a **self liquidating funnel (SLO)** is when you send people to a low-priced offer first in order to liquidate ad costs.
- 2) **Tripwire funnel** is when you have a freebie first and a low-priced offer on the second page.
- 3) **Order bump** is a little tick box on the checkout page of a product or service. This has the least amount of 'real estate' so it needs to be super clear.
- 4) **Upsell** comes after a purchase, it can be a 'one click upsell' in which the customer does not need to enter their details all over again. It can be even more of the same product. The upsell is related to the first purchase in which is appears after.
- 5) **Cross sell** is another offer that is not directly related to the purchase but may complement it. Think about buying a canva template of launch assets to sell a course.... An upsell would be launch copy or email copy for a launch (all launch related). However a cross-sell would be another canva template but a different topic, such as black friday sales.

Choose what you'll be focusing on in this funnel..

I will be focusing on **low ticket** / mid ticket / high-ticket:



THIS IS WHAT YOUR PASSIVE INCOME FUNNEL LOOKS LIKE VISUALLY

You can see that the passive income funnel focuses on PRE-PRODUCT and is the in the awareness stage of the buyers' journey,

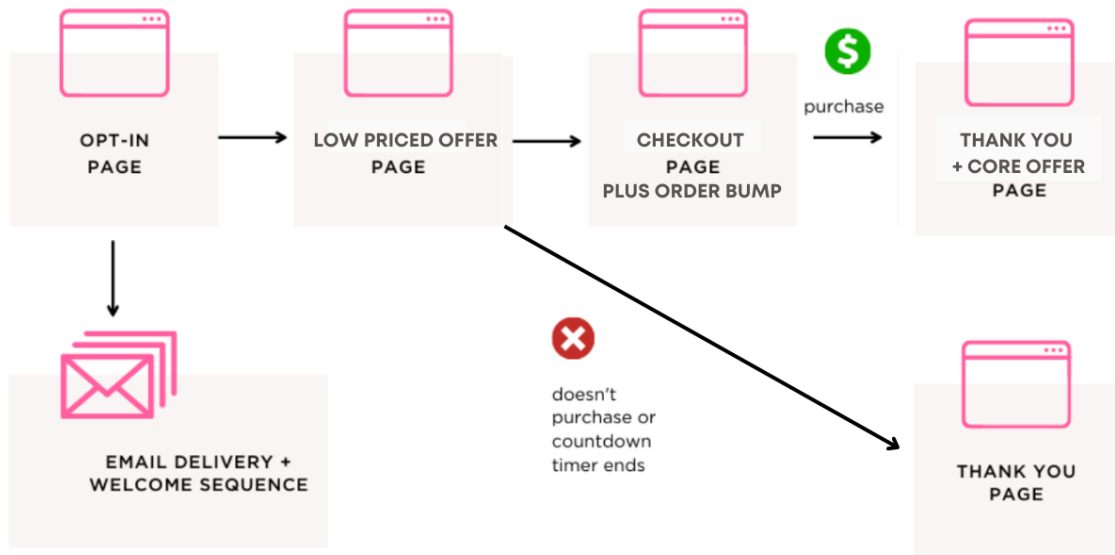
Then we have a masterclass, challenge, series of content and/or videos to warm a person up to our CORE OFFER.

'Warm a person up' is all about building TRUST. If you can establish trust faster (i.e. via referral or Netflix-style binging of your YouTube channel) then you can bypass other stages. This funnel is all about building trust.

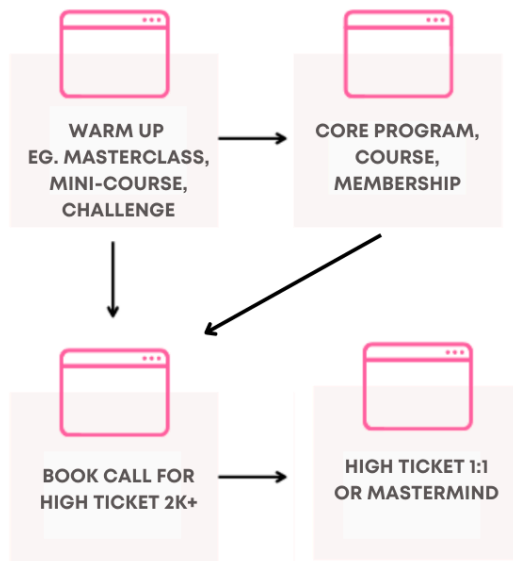
Trust comes before a transaction for higher-priced purchases.



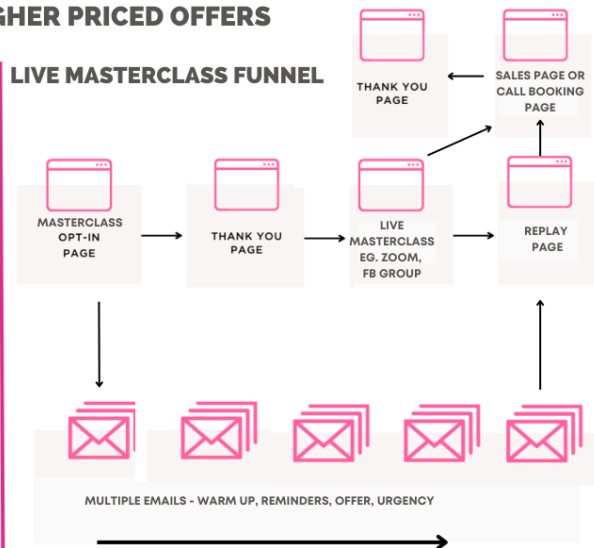
PASSIVE INCOME FUNNEL



FUNNEL #2 WARM UP TO MID-HIGHER PRICED OFFERS



LIVE MASTERCLASS FUNNEL



3.1 STRATEGIC FREEBIE

Now we will plan out freebies that lead the ideal customer towards your higher priced offers.

List complimentary resources that would benefit your audience, particularly those in the initial "awareness" phase of their journey. At this point, they're beginning to recognize a need but aren't sure of the solution.

What could you provide that delivers immediate value and introduces them to your world?

What does your audience need to know at the very beginning of their journey with you, before they know you can help them, they need to know that a solution exists.

What could be a snippet or part of your higher priced offer. Something you can take out and solve a more immediate need?

Please refer to AI Powered Launch Kit in “uploading the consciousness of your brand” to prime ChatGPT about your business and what you want to offer.

You can then use it to help you brainstorm a strategic freebie. By simply asking ChatGPT “Give me 20 examples of a strategic freebie that seamlessly leads into my higher priced offer of_____”.

Good strategic freebies are designed to provide immediate value, establish your expertise, and seamlessly lead your audience towards your paid offerings. Here are examples tailored to different niches:

For Health & Wellness Coaches:

"7-Day Detox Plan": A comprehensive guide to kickstarting a detox with daily recipes and tips.

"Mindful Eating Journal": A printable journal to help track eating habits and cultivate mindfulness around food.

"10 min Yoga for Stress Relief": A video series introducing yoga poses and sequences to reduce stress.

For Business & Marketing Consultants:

"Instagram Social Media Audit Template": A detailed checklist for businesses to assess and improve their social media strategy.

"10x Your Email Open Rates": An e-book with actionable strategies to improve email marketing effectiveness.

"Brand Identity Workbook for Beauty Influencers": A step-by-step guide to defining and developing a strong brand identity.

For Personal Development Coaches:

"21 Days of Positive Affirmations for Stay at Home Mums Worried About Their Career": A daily affirmation guide to boost self-esteem and motivation.

"Goal Setting Workshop to Cut Your Work Load in Half": An interactive webinar teaching effective goal-setting techniques.

"The Ultimate Self-Care Checklist for Caregivers": A comprehensive list of self-care activities categorized by physical, emotional, and spiritual wellness.

For Financial Advisors:

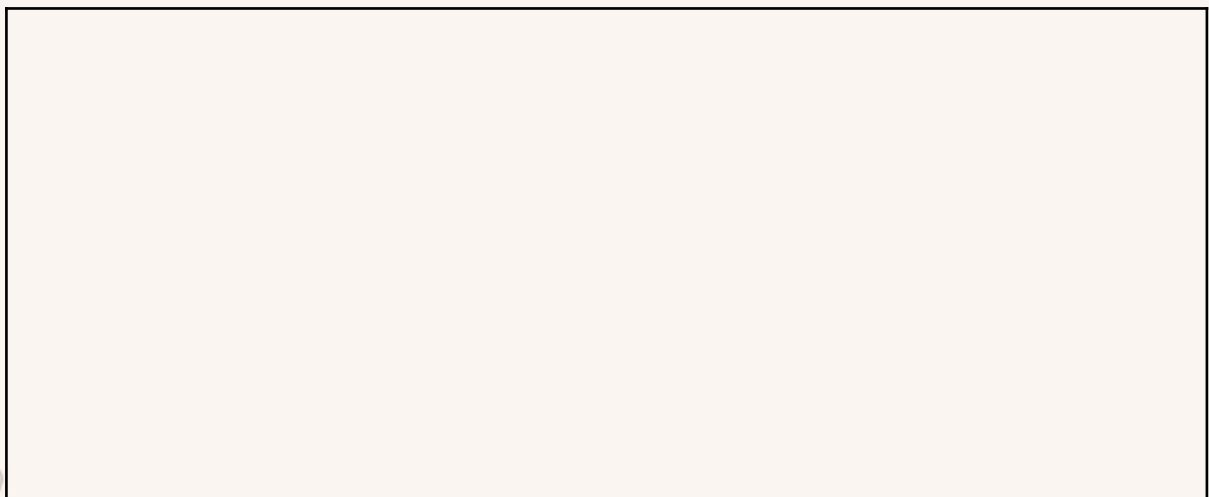
"Budget Planner Spreadsheet for Luxury Frugal Travel": An easy-to-use template to help track and manage personal finances.

"Real Estate Investment Basics for Beginners": An e-book demystifying investment concepts for new investors.

"Financial Freedom Roadmap Starting From Scratch at 50": A step-by-step guide to achieving financial independence.

By offering these strategic freebies, you not only provide immediate value but also demonstrate your expertise, setting the stage for a deeper engagement with your paid products or services.

NOTE: If you use ChatGPT you often need to refine the strategy further than the examples it provides.



3.1 LOW-PRICED OFFER (PRE-PRODUCT)

Revisit your list of digital assets to identify a product that seamlessly aligns with your lead magnet and serves as an ideal progression from it towards your core offer.

Ensure this asset can be offered at a price point below \$50 (or some case can be up to \$100 - it just has to be an impulse buy price point for your ideal client)



3.2 ORDER BUMP (MAXIMISE CART VALUE)

An order bump is a sales technique where an additional, related offer is presented to customers during the checkout process. This offer is usually a complementary product or service to what's already being purchased, designed to increase the overall transaction value in a convenient and non-intrusive way.

To create an effective and compelling order bump, it should possess several key qualities:

Relevance: It must be directly related to the main product being purchased, offering a natural extension or enhancement that the customer will find valuable.

Irresistible Value: The offer should present a clear value, often provided at a lower price point than if purchased separately, making it a no-brainer addition for the customer.



Convenience: Adding the order bump to their purchase should be as easy as ticking a box—literally. The simpler it is to add, the higher the likelihood of acceptance.

Immediate Benefit: The product or service offered as an order bump should have an immediate benefit or use alongside the main purchase, enhancing the overall user experience.

Exclusivity: If possible, the offer should feel exclusive to the checkout process, creating a sense of urgency and making it more enticing.

Low Risk: Given its lower price point, the order bump should present a low financial risk to the customer, encouraging impulse buys.

Clarity: The description and value of the order bump must be clearly articulated, so customers understand exactly what they are getting and why it's beneficial.

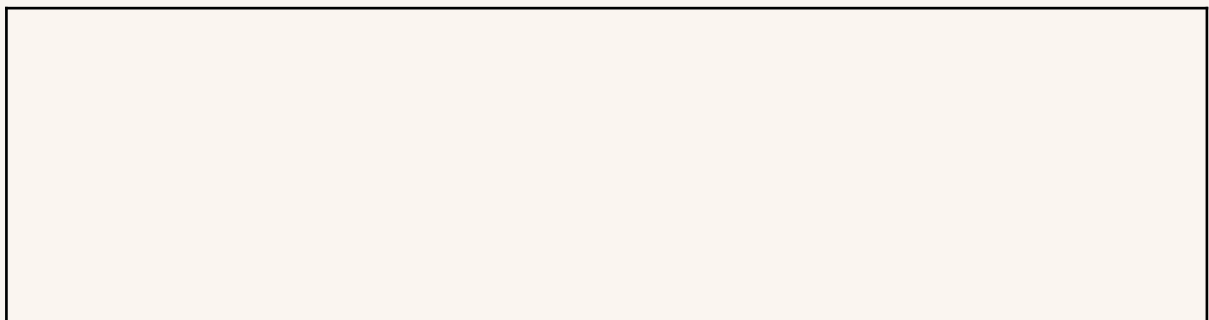
Scalability: The order bump should be easily deliverable without significantly increasing operational costs or fulfillment challenges, ensuring profitability.

Quick Consumption: Ideally, the order bump should be something the customer can use or benefit from quickly, increasing satisfaction and reinforcing the value of their purchase decision.

Feedback Ready: A good order bump not only satisfies customers but also provides the business with valuable feedback on complementary products or services that resonate with their audience.

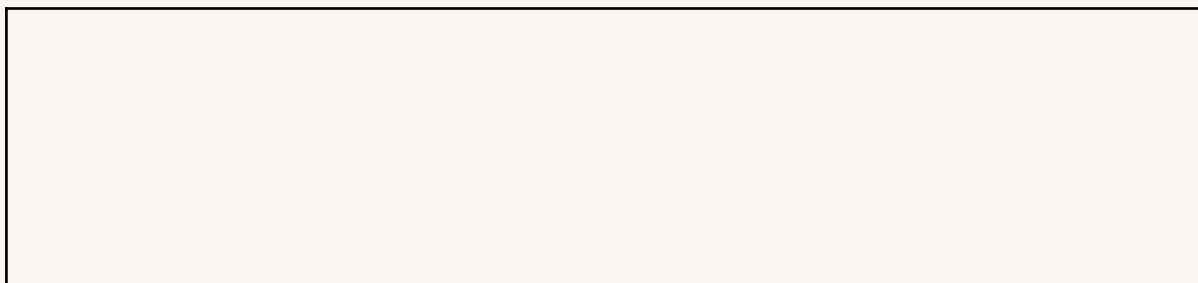
Incorporating a well-thought-out order bump can dramatically increase the average order value and enhance customer satisfaction by providing additional value with minimal effort.

What is your order bump:



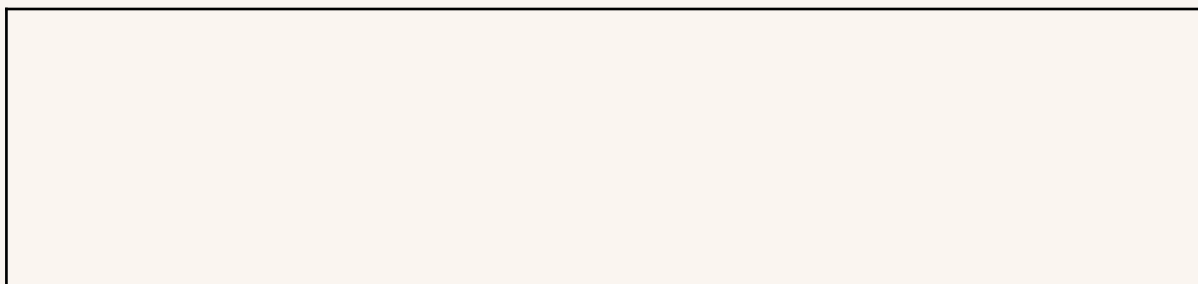
3.3 ONE-TIME OFFER (OPTIONAL)

What exclusive deal can you present at a unique, once-in-a-lifetime price, available only in this moment? If not seized upon immediately, this offer will not be accessible at such a rate ever again. Ensure this offer is intricately connected to your existing assets and perfectly meets your audience's current needs.



3.4 SIGNATURE OFFER (CORE PRODUCT OR SERVICE)

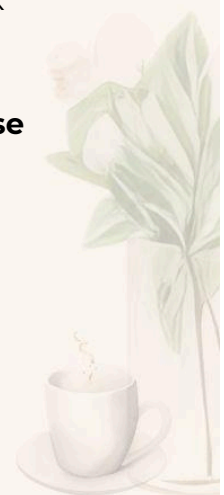
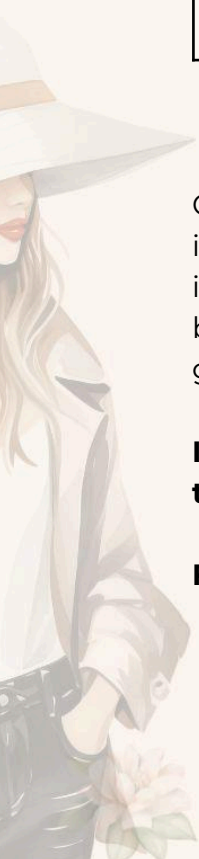
List your core offer that is priced preferably over \$1000



Consider what essential step your audience must undertake or what crucial insight they require just before they're primed to embrace your core offer. For instance, could a webinar/masterclass or a challenge deliver substantial value to bridge them to readiness? Could you educate regularly inside a private facebook group to build know-like-trust?

Identify the pivotal conversion event or the urgency-driven scenario you'll use to entice individuals towards your flagship offering.

For example:



Limited-Time Discount Offer: A special price reduction available only for a short period, compelling quick decision-making.

Exclusive Access: Providing insider knowledge or training through a one-time webinar, available only to participants.

BETA TESTER or Early Bird Specials: Rewarding early decision-makers with special pricing or bonuses, creating a sense of urgency to act fast.

Flash Sale: A sudden, short-term discount on your flagship offering, sparking immediate interest and action.

Countdown Timer on Offer Page: Visual countdowns emphasizing the limited availability of the offer, increasing urgency.

Bundle Offer: Packaging your core offer with additional bonuses or products for a limited time, enhancing perceived value.

VIP Access for First Few Buyers: Offering exclusive benefits, like additional coaching or support, to the initial group of purchasers.

Limited Spots Available: Capping the number of available offers to create scarcity and encourage prompt action.

One-Day Only Access to a Bonus Module: Offering a bonus piece of content or training module available for access for just 24 hours after signing up.

Special Anniversary Pricing: Celebrating a milestone with special pricing, available only around the anniversary date.

“Last Chance” Email Sequence: A series of emails emphasizing the closing window for the offer, creating a narrative of urgency.

Holiday-Themed Promotions: Leveraging holiday seasons to offer special, themed discounts or bonuses for a limited time.

Buy-One-Get-One-Free (BOGO): A limited-time offer encouraging immediate purchase to receive an additional product at no extra cost.

Price Increase Announcement: Informing prospects of an upcoming price increase to encourage purchase at the current lower price.

Exclusive Membership Enrollment Period: Opening membership for your flagship offering for a limited time before closing doors.

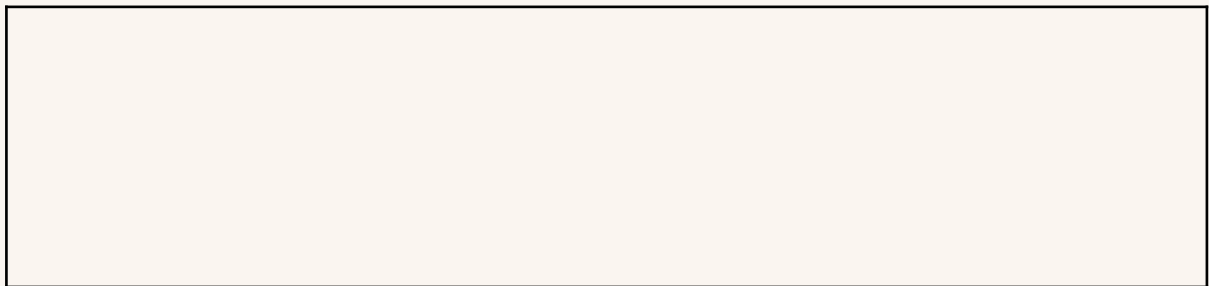


Interactive Challenge with a Deadline: Hosting a challenge that leads participants towards your offer, with a clear end date to participate.

“Doors Closing” Masteclass: A final live event emphasizing the last opportunity to join or purchase before an offer expires.

Seasonal Offer Expiration: Using the change of seasons as a natural endpoint for an offer, such as an "end of summer" sale.

Identify the pivotal conversion event or the urgency-driven scenario you'll use to entice individuals towards your signature offering:



3.5 HIGH-TICKET OFFER OR ONGOING OFFERS / MEMBERSHIP (POST-PRODUCT)

Creating high-ticket offers or post-product strategies such as memberships involves providing significant value that justifies the premium pricing. These offerings are designed to deepen the customer's engagement with your brand, ensuring both immediate and long-term value.

Here's a list of high-ticket offer concepts and membership strategies that can serve as your post-product:

Executive 1:1 Coaching Program: Personalized, intensive coaching for high-level professionals aiming for breakthroughs in their careers or businesses.

Mastermind Groups: Exclusive, small group sessions facilitating peer-to-peer learning, accountability, and networking, often with direct access to industry experts.

Certification Courses: Specialized training programs that offer professional certification upon completion, adding value to the participants' professional credentials.

Done-for-You Services: Comprehensive, custom solutions where your team takes over a specific aspect of the client's business, such as marketing campaigns, funnel building, or content creation.

Retreats and Workshops: High-end, in-person or virtual events offering immersive experiences, hands-on learning, and networking opportunities.

Premium Membership Clubs: Access to an exclusive community offering ongoing support, resources, networking opportunities, and continuous learning.

Advanced Online Courses: In-depth, comprehensive courses covering advanced topics with lifetime access, updates, and possibly personal feedback sessions.

Private Consulting Engagements: One-on-one consulting services tailored to address specific challenges or goals of the client, offering deep dives into solutions and strategies.

Technology Platforms or Software: Subscription access to proprietary tools, platforms, or software that enhance efficiency, productivity, or provide a competitive edge.

VIP Days: One-day, intensive sessions focused on deep strategy work, planning, and execution guidance, often in a one-on-one setting.

Customized Wellness Plans: Personalized health, nutrition, or fitness plans with ongoing support from professionals, including personal training sessions or diet planning.

Content Creation Subscriptions: Regularly scheduled, high-quality content creation services for businesses, including video production, blogging, or social media content.

Real Estate Investment Advisory: Insider advice on real estate investment strategies, market analysis, and portfolio management for aspiring or current investors.

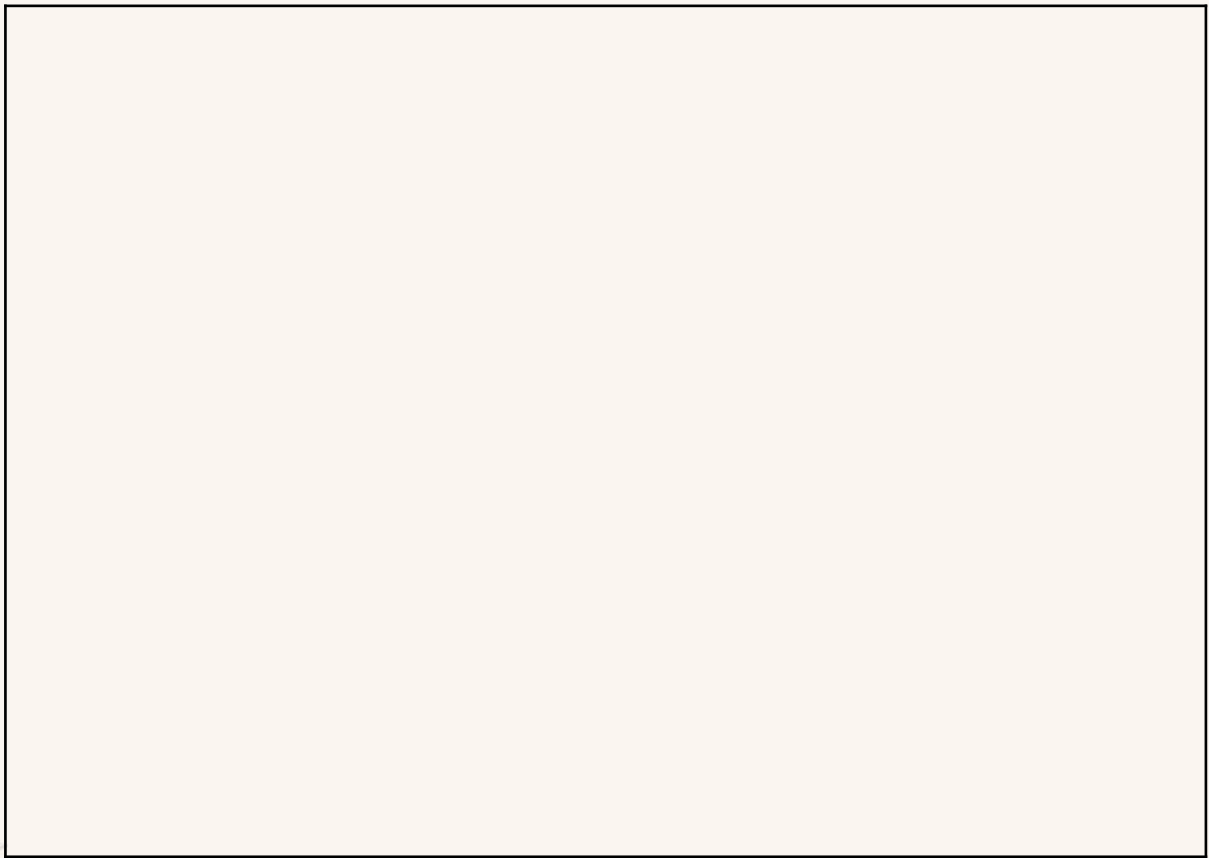
Fine Art Collectors' Board: Membership offering exclusive access to art collections, private viewings, and investment advice in the art market.

Luxury Travel Concierge Memberships: Tailored travel planning services offering unique experiences, exclusive accommodations, and personalized itineraries.

Financial Planning and Wealth Management: High-touch, personalized financial planning and wealth management services for high-net-worth individuals.

Each of these high-ticket offers or memberships is structured to deliver exceptional value, fostering long-term relationships and ensuring customer satisfaction and loyalty.

What is your post product:



NEXT STEPS - TURN YOUR MAP INTO A CASH-GENERATING FUNNEL

[Watch Video](#)



Now is your chance to get it **FINALLY** set up!

[*Check out Primed to Sell:
The Passive Income Project*](#)

