WORKSHEET 4.2
CREATE AN ACTION FUNNEL

How can we support conscious decision making?

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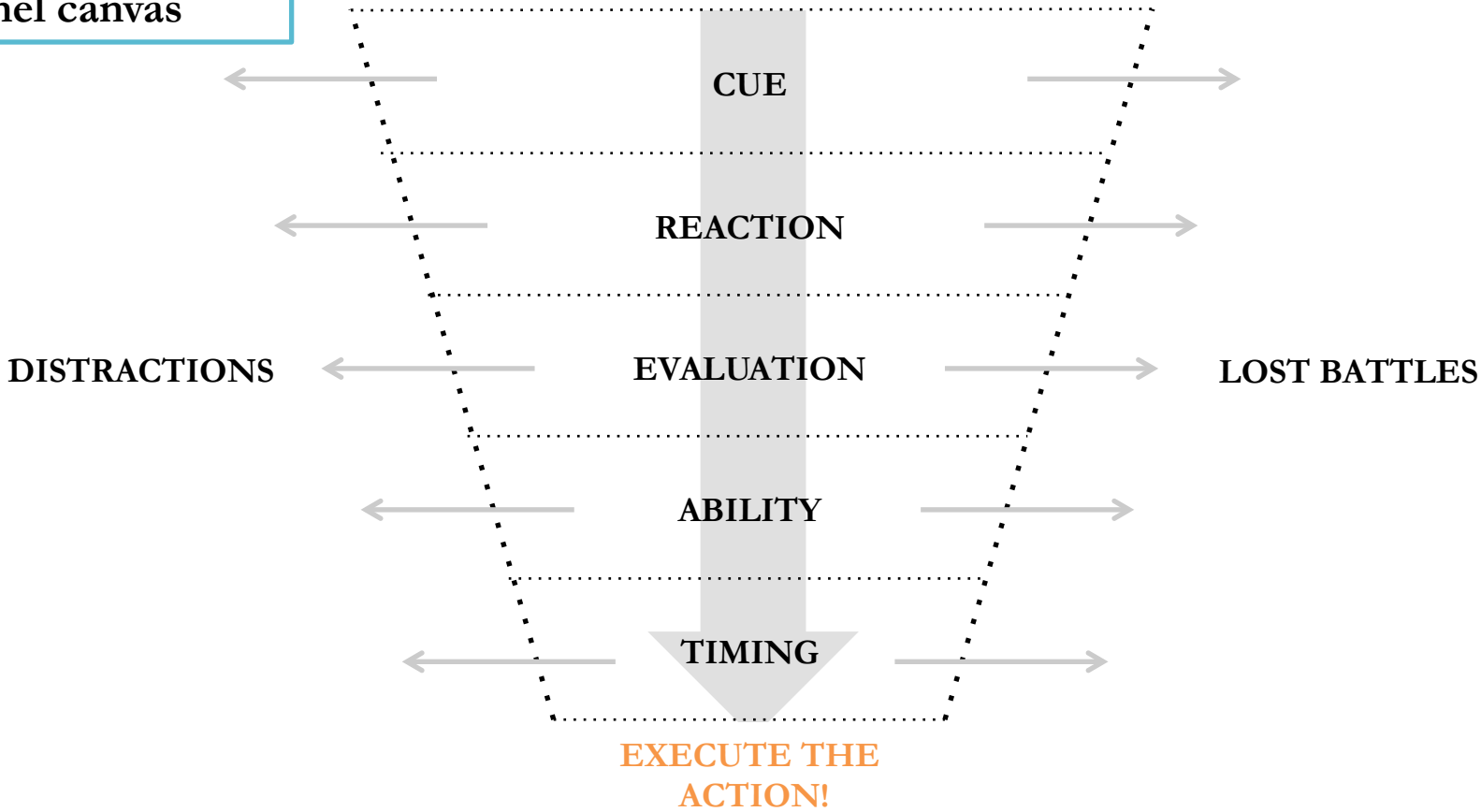
2 CREATE AN ACTION FUNNEL

CREATE action funnel canvas



2 CREATE AN ACTION FUNNEL

0. SELECT YOUR CASE

Target audience: .....

Target action: .....

Fill out

A. NEW PROJECT

1. IDEATE THE FUNNEL
2. FACE POTENTIAL CHALLENGES
3. REFINE THE FUNNEL
4. SELECT STRATEGIES
5. PLAN AN ITERATION

B. IMPROVE EXISTING PROJECT

1. PRESENT SITUATION
2. FIX THE WHOLES
3. SELECT STRATEGIES
4. PLAN AN ITERATION

Select the funnel fitting your project

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A. NEW PROJECT

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WITH INSTRUCTION TEXTS

Fill out the text

Follow the instructions displayed in the yellow callouts.

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1. IDEATE YOUR FUNNEL

Target audience: .....

Target action: .....

NEW PROJECT

Answer the questions with many ideas on post-its

CUE

How will we make sure the user thinks of the action?

How can we remind the user?

How can we surprise the user?

REACTION

How will we drive a positive intuitive response?

How can we make the action:

Relevant
(social norms, linked to top of mind experience)

Enjoyable
(linked to positive past associations, providing pleasure)

Not dangerous (familiar, build trust in your project, reinsurance)

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2. FACE POTENTIAL CHALLENGES

Target audience: .....

Target action: .....

NEW PROJECT

Answer the questions with many ideas on post-its

CUE

What could distract the user?

Why could the user not notice the action?

REACTION

What could distract the user?

What could create a negative reaction?

EVALUATION

What could distract the user?

Why costs of performing the action can be higher then benefits?

ABILITY

What could distract the user?

Why may the user not able to act now?

TIMING

What could distract the user?

Why should the user not execute the action later?

EXECUTE THE ACTION!

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3. REFINE THE FUNNEL

Target audience: .....

Target action: .....

NEW PROJECT

CUE

What could distract the user?

Why could the user not notice the action?

Address the challenges by developing new strategies for keeping users in the funnel

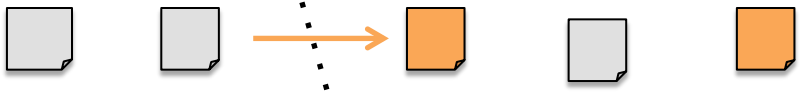
REACTION

What could create a negative reaction?

EVALUATION

What could distract the user?

Why costs of performing the action can be higher then benefits?



ABILITY

What could distract the user?

Why may the user not able to act now?

TIMING

What could distract the user?

Why should the user not execute the action later?

EXECUTE THE ACTION!

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4. SELECT STRATEGIES

Target audience: .....

Target action: .....

NEW PROJECT

CUE
How will we make sure the user thinks of the action?

What could distract the user?

Why could the user not notice the action?

REACTION
How will we drive a positive intuitive response?

What could create a negative reaction?

Select 1-2 strategies to implement in your next iteration

EVALUATION
How will we highlight benefits and downplay alternatives?

What could distract the user?

Why costs of performing the action can be higher then benefits?

ABILITY
How will we show the process and make users confident to succeed?

What could distract the user?

Why may the user not able to act now?

TIMING
How will we show that the action has to be performed now?

What could distract the user?

Why should the user not execute the action later?

EXECUTE THE ACTION!

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5. PLAN AN ITERATION

Our strategy
CUE: .....
REACTION: .....
EVALUTATION: .....
ABILITY: .....
TIMING: .....

Plan the next iteration

	What?	Who?	When?	What else?
Quick test				
Develop				
Test				
Learn				

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PLAIN VERSION

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1. IDEATE YOUR FUNNEL

Target audience: .....

Target action: .....

NEW PROJECT

CUE

How will we make sure the user thinks of the action?

How can you remind the user?

How can surprise the user?

REACTION

How will we drive a positive intuitive response?

How can we make the action:

Relevant
(social norms, linked to top of mind experience)

Enjoyable
(linked to positive past associations, providing pleasure)

Not dangerous (familiar, build trust in your project, reinsurance)

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1. IDEATE YOUR FUNNEL

EVALUATION

How will we highlight benefits and downplay alternatives?

NEW PROJECT

How can we decrease the costs and increase the advantages of performing the action? (> MAKE IT EASY)

How can we highlight the benefits of executing the action?
- Present benefit
- Long-term benefits

How can we highlight the disadvantages of alternative actions?

How can we link the action with progress on the long-term objective of the user?

ABILITY

How will the user know that he/she is able to successfully perform the action?

How can we display the steps, resources and skills required to perform the action?

How can we help the user to gain the required resources and skills?

How can we provide confidence to the user that he will succeed in performing the action?

TIMING

How will we show that the action has to be performed now?

How can we place the action in a moment that suits the user?

How can we create a sense of urgency? (limited availability, special offer)

How can we help making the timing of a planned action specific?

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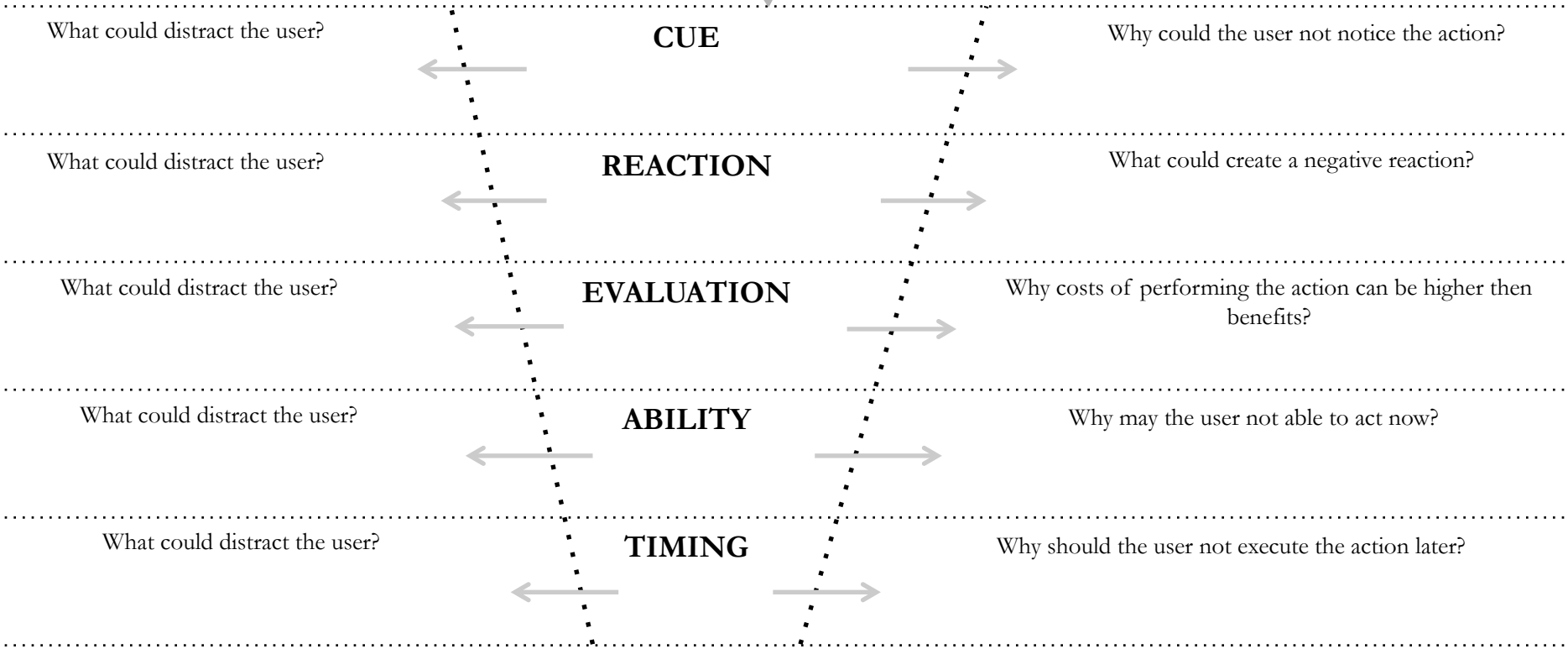
2. FACE POTENTIAL CHALLENGES

Target audience: .....

Target action: .....

NEW PROJECT



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3. REFINE THE FUNNEL

Target audience: .....

Target action: .....

NEW PROJECT

What could distract the user?	**CUE** How will we make sure the user thinks of the action?	Why could the user not notice the action?
What could distract the user?	**REACTION** How will we drive a positive intuitive response?	What could create a negative reaction?
What could distract the user?	**EVALUATION** How will we highlight benefits and downplay alternatives?	Why costs of performing the action can be higher then benefits?
What could distract the user?	**ABILITY** How will we show the process and make users confident to succeed?	Why may the user not able to act now?
What could distract the user?	**TIMING** How will we show that the action has to be performed now?	Why should the user not execute the action later?

EXECUTE THE ACTION!

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4. SELECT STRATEGIES

Target audience: .....

Target action: .....

NEW PROJECT

What could distract the user?	**CUE** How will we make sure the user thinks of the action?	Why could the user not notice the action?
What could distract the user?	**REACTION** How will we drive a positive intuitive response?	What could create a negative reaction?
What could distract the user?	**EVALUATION** How will we highlight benefits and downplay alternatives?	Why costs of performing the action can be higher then benefits?
What could distract the user?	**ABILITY** How will we show the process and make users confident to succeed?	Why may the user not able to act now?
What could distract the user?	**TIMING** How will we show that the action has to be performed now?	Why should the user not execute the action later?

EXECUTE THE ACTION!

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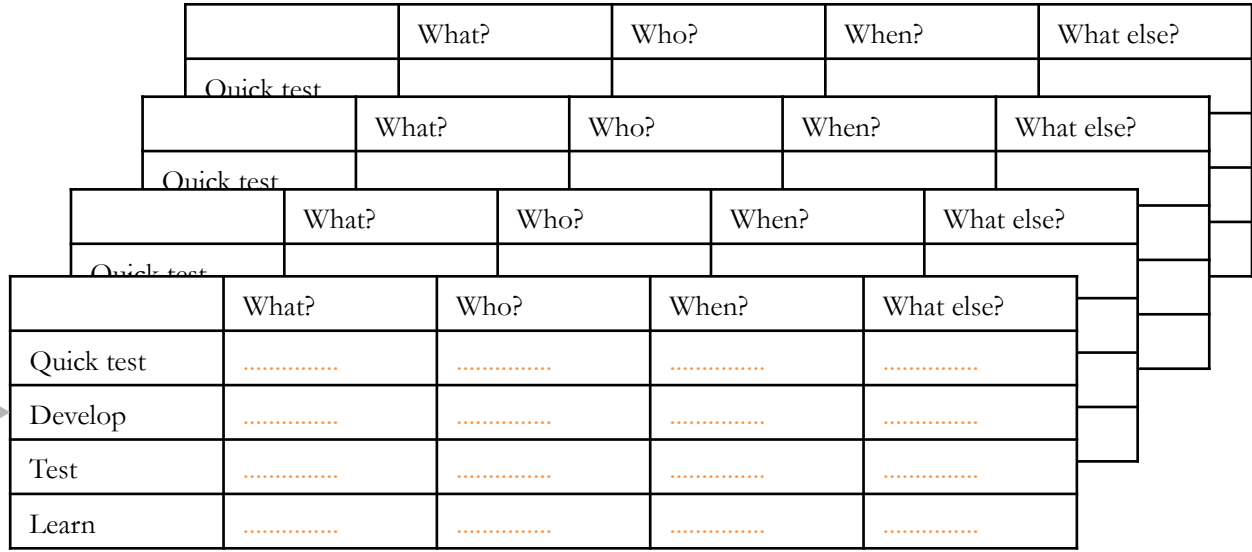
5. PLAN AN ITERATION

Our strategy
CUE: .....
REACTION: .....
EVALUTATION: .....
ABILITY: .....
TIMING: .....



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EXISTING PROJECT

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WITH INSTRUCTION TEXTS

Fill out the text

Follow the instructions displayed in the yellow callouts.

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1. PRESENT SITUATION

Target audience: .....

Target action: .....

EXISTING PROJECT

Answer the questions with many ideas on post-its

CUE
How do we make the user think of the action?

What distracts the user?

Why do users do...

REACTION
How do we generate an intuitive positive response?

What distracts the user?

What creates a negative reaction?

EVALUATION
How do we highlight benefits and downplay alternatives?

What distracts the user?

When are costs of performing the action higher then the benefits?

ABILITY
How do we show the process and make users confident to succeed?

What distracts the user?

Which users are not able to take action?

TIMING
How do we show that the action has to be performed now?

What distracts the user?

Why can user execute the action later?

EXECUTE THE ACTION!

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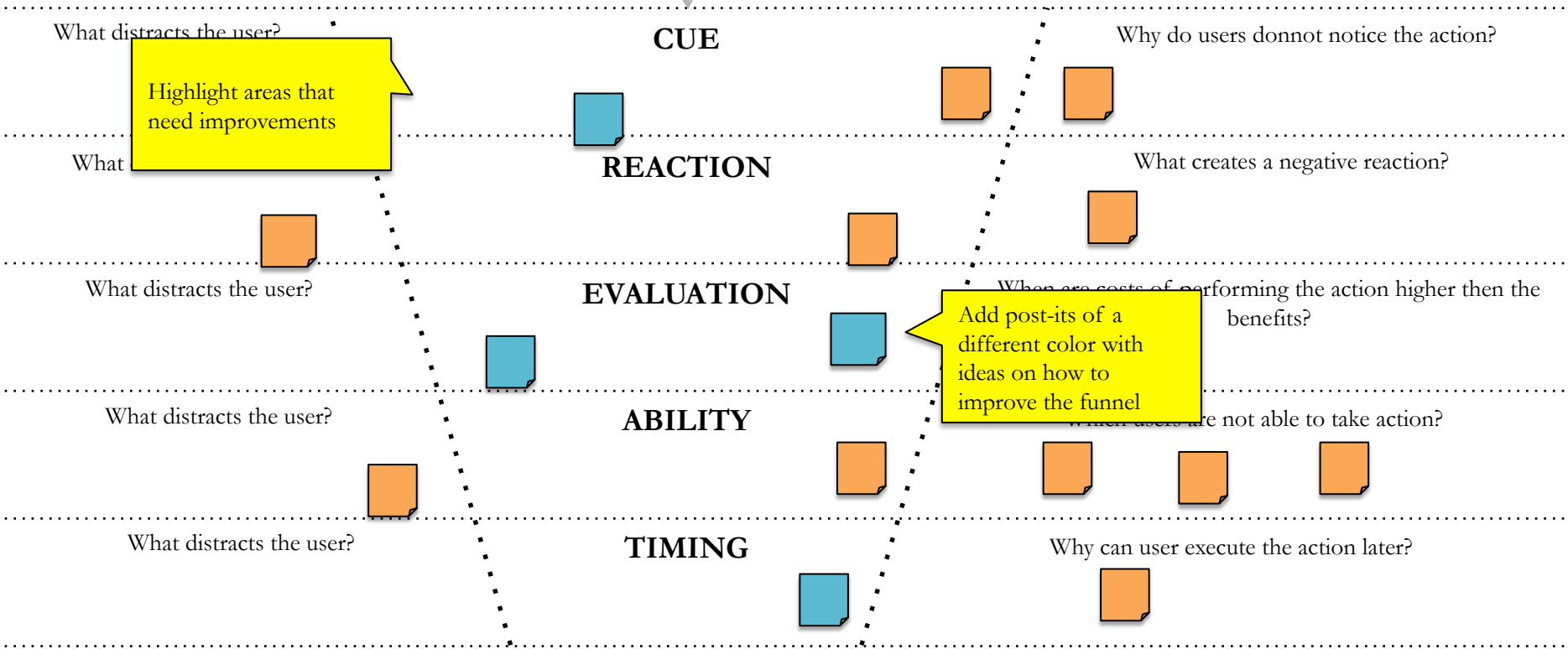
2. FIX THE WHOLES

Target audience: .....

Target action: .....

EXISTING PROJECT



EXECUTE THE ACTION!

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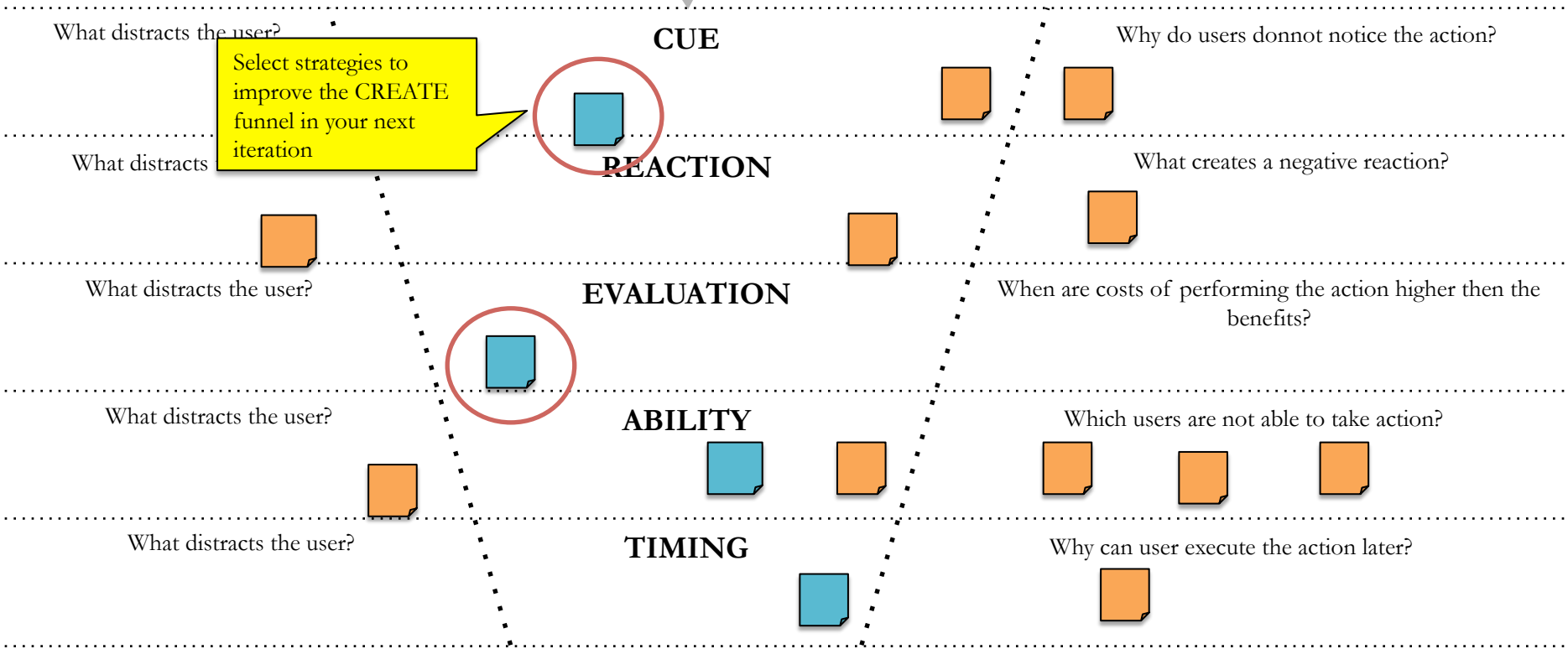
3. SELECT STRATEGIES

Target audience: .....

Target action: .....

EXISTING PROJECT



EXECUTE THE ACTION!

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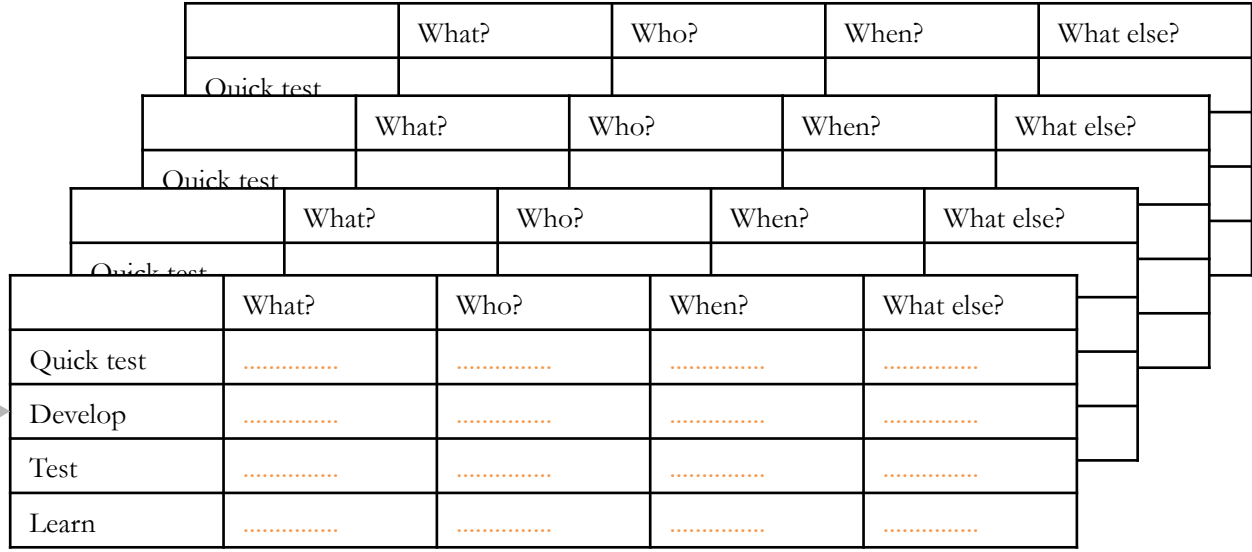
5. PLAN AN ITERATION

Our strategy
CUE: .....
REACTION: .....
EVALUTATION: .....
ABILITY: .....
TIMING: .....

Plan the next iteration



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PLAIN VERSION

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1. PRESENT SITUATION

Target audience: .....

Target action: .....

EXISTING PROJECT

What distracts the user?	**CUE** How do we make the user think of the action?	Why do users donnot notice the action?
What distracts the user?	**REACTION** How do we generate an intuitive positive response?	What creates a negative reaction?
What distracts the user?	**EVALUATION** How do we highlight benefits and downplay alternatives?	When are costs of performing the action higher then the benefits?
What distracts the user?	**ABILITY** How do we show the process and make users confident to succeed?	Which users are not able to take action?
What distracts the user?	**TIMING** How do we show that the action has to be performed now?	Why can user execute the action later?

EXECUTE THE ACTION!

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4. PLAN AN ITERATION

Our strategy
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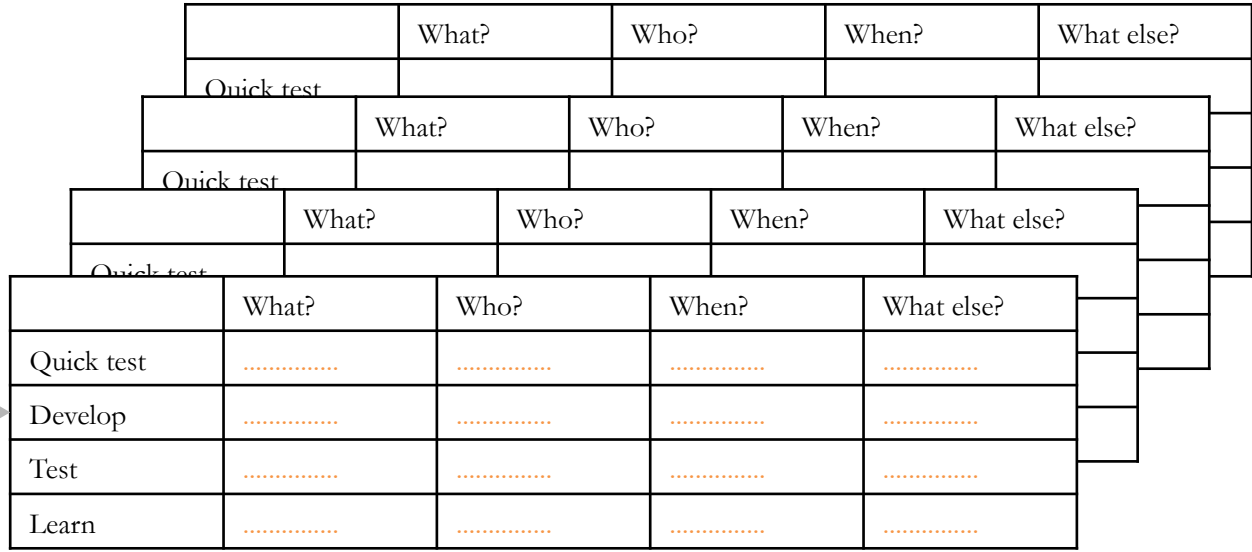
ABILITY: .....
TIMING: .....



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