



The CharTec Conversion System™

What High Converting MSP Funnels Actually Look Like

*Inside: Our Proven Funnel Framework
+ Checklist MSPs Use to Scale Revenue*



**WHAT IF THE PROBLEM ISN'T YOUR
MARKET? OR YOUR MESSAGING?
OR EVEN YOUR OFFER?**

What if it's the funnel?

Most MSPs running vendor-built “marketing” are stuck in a cycle that looks like this:

- Campaigns go out ✓
- Sales doesn't follow up 🧑
- Leads vanish into the void 🤖
- “Marketing doesn't work” becomes the verdict 😞

But here's the truth:

The best funnels don't feel like funnels at all.

They feel like momentum.

Why Most Funnels Fail

Here's where MSP funnels usually break down:

No automation or
behavior-based follow-up

Sales and marketing running
parallel with no shared goals

Generic, "monthly blast" campaigns
with no buyer-stage alignment

The website is pretty—but
unsearchable and not AEO-optimized

Everyone's "done-for-you content" sounds
the same—and it sounds nothing like *you*

Marketing isn't failing you.

**Your funnel isn't built to
connect, convert, or continue
the conversation.**

The Fix: Funnel = System

A high-converting MSP funnel has 4 key traits:

1. Continuity

Your campaigns build on each other. They move prospects based on **intent and behavior**, not guesswork.

2. Sales Alignment

Every lead has a clear path to follow—and your sales team gets a playbook, not just a list.

3. Visibility

You know what's working, where drop-off happens, and which buyers are *actually* ready.

4. Ascension

Your funnel should never be a dead end.

Every prospect should always have the next logical step.

Whether it's:

- Booking a call
- Accessing a deeper resource
- Joining a readiness assessment
- Being routed into a sales-driven nurture

Ascension ensures you're always advancing the relationship, not stalling it.

Marketing isn't just generating leads—it's creating motion.



The Funnel Reality Check (Checklist)

(See full checklist on next page)

You'll evaluate:

- ☐ Your marketing infrastructure
- ☐ Your automation and buyer behavior tracking
- ☐ Your sales team's task alignment
- ☐ Whether your system actually supports revenue, not just impressions

Real-World Coaching, Not Copy-Paste Junk

CharTec's marketing program includes more than emails and social media.

You get **sales coaching, intent journey strategy, AEO**, and actual **task-level follow-up plans** for your team.

And you don't have to guess if it's working—we drip **up to 4,000 contacts** into a strategy designed to convert.

This isn't a "vendor."
It's a **revenue engine**.



What MSPs Are Asking:

“Why aren’t my email campaigns converting?”

“What does a good MSP funnel look like?”

“How do I align marketing and sales better?”

“What is AEO and why does it matter now?”

“How do I switch from my current marketing vendor mid-contract?”

If these sound familiar—you’re in the right place.

See How You Stack Up

Flip to the **Revenue Funnel Checklist** and grade your funnel. Most MSPs score below 10—and they don’t even know it. Once you’ve done that...

Book a No-Pressure Strategy Call

Let’s fix what’s broken—and rebuild what’s missing. This is where the funnel finally clicks.



MSP Revenue Funnel Reality Check

How to Know If Your Funnel Is Actually Built to Convert

Use this checklist to uncover the invisible gaps sabotaging your marketing ROI.
If you're missing even 3 of these, it's not your leads—it's your funnel.

Marketing Infrastructure

- ☐ Our campaigns are structured with a clear CTA mapped to a journey (not just “blasts”)
- ☐ We're using behavior-based nurturing (intent + activity) to move leads—not relying on monthly newsletters
- ☐ Our website is optimized for **AEO** and built around buyer intent—not just SEO noise
- ☐ Every contact gets routed into an automation, not just dropped into a CRM
- ☐ Our campaigns match our tone and vertical—not vendor-branded noise
- ☐ We track real **conversion metrics**—not just open/click rates

Sales Alignment

- ☐ Our sales team receives tasks tied to each campaign—not just names in a list
- ☐ Sales knows the why behind each email they're following up on
- ☐ Every lead has an assigned outcome (appointment, nurture, disqualify)
- ☐ We aren't guessing on next steps—**they're assigned inside our automation**
- ☐ Our reps follow a sales process that's integrated into marketing—not separate from it

Intent Buyer Strategy

- ☐ We have a system for identifying high-intent behavior (not just engagement)
- ☐ Our leads are segmented by buyer stage—not lumped into a generic drip
- ☐ We use links like “Schedule Sales Training” or “Request Premium Marketing Support” to drive journey direction
- ☐ We actually track where buyers click so we can adjust in real time
- ☐ Our automation can trigger journeys based on behavior—not just a form fill

INCLUDED RESOURCE:

Revenue Funnel Reality Check

(Checklist with 16 conversion-critical questions)

See where your funnel is strong—and where it's silently leaking revenue.

Coaching-Level Clarity (Bonus: Ask Yourself)

- Can you name the top 3 objections your buyers give—and how marketing is addressing them?
- What does your marketing funnel do when a lead goes cold?
- Are you sending leads to a closer—or just sending “warm intros” and hoping?
- Who owns the result when a campaign underperforms—marketing or sales?
- When's the last time you watched a campaign video and said “yep, that sounds like us”?

Score It:



 **<10:** You don't need a new funnel.
You need a new system.

 **10–13:** You're doing a lot right,
but you're leaving money on the table.

 **14–16:** You're in great shape
—just need refinement.



About CharTec

CharTec isn't a vendor. It's a team.
You don't get templates. You get strategy.

That team includes:

- Strategic Marketing Manager
- Sales Coach
- Email Coordinator
- Social Media Creative
- Website Designer
- Content Writer
- Ad Specialist
- Journey Strategist
- CRM Platform Manager

Ready to Rethink the Funnel?

Book Your Funnel Strategy Call

We only take on a **limited number of MSPs**—because strategy shouldn't be mass-produced.