

Representative Conversion Journey Diagnostic

Where suitable prospects were getting stuck, and why the obvious fixes were not the first ones to make

Steve New | Conversion Consultant

Representative sample based on real diagnostic work I carried out inside a professional-training business. It was not a paid external consulting engagement. Names, identifying details and commercially sensitive information have been removed or generalised. The underlying reasoning, quantitative relationships and decision logic have been preserved.

The decision brief

FINDING

Among the serious prospects I could observe, the repeated problem was not primarily understanding why the programme was valuable. It came later: deciding whether joining was genuinely right and workable now.

That distinction matters. The journey contained visible problems in checkout, support, onboarding and the first live experience. Several were real. The evidence did not support treating any of them as the first major constraint.

The strongest counter-evidence came from onboarding. Support records made onboarding look messy, but after the eligible population was reconstructed, 53 of 54 participants reached at least part of the first live session, roughly 98%. That is strong evidence against large pre-opening attrition being the main leak.

Decisions

- First, create one trusted internal source for current commercial and participation rules.
 - Second, turn those settled rules into one concise prospect-facing decision guide.
 - Third, give serious buying questions an owner, a next action and a closed-loop status when self-service information is not enough.
-

Do not change yet

I would not yet cut the standard price, rebuild checkout or onboarding, redesign the curriculum, substantially increase sales email, weaken certification requirements, or try to prevent every early refund.

The useful result of the diagnostic is therefore not a longer optimisation list. It is a smaller set of decisions, including work the business can stop considering for now.

1. Decision question and journey boundary

Decision question: Where does useful customer progress first repeatedly weaken between serious consideration and the first live session, why is that happening, and what should change before the next sales cycle?

Journey boundary: serious consideration to right-and-workable decision to purchase to onboarding to first live experience.

I treated serious prospects who did not buy as a distinct evidence group. I prioritised people whose behaviour or own words showed genuine consideration and plausible fit rather than assuming that every click, abandoned checkout or silent lead represented the same kind of loss.

The diagnostic was intentionally bounded. It does not establish whether the business needs more top-of-funnel demand. It asks what happens once somebody is seriously considering this programme.

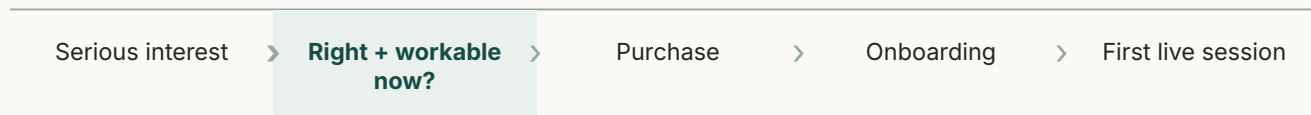
2. Evidence map

Different evidence types answered different questions. I did not treat a support anecdote, an abandoned checkout and an attendance record as interchangeable.

Evidence	What it told me	Decision effect
Qualified prospect language	Repeated value recognition, with later questions about fit, workload, attendance and certification.	Weakened "value is unclear" as the primary diagnosis; moved attention to fit and feasibility.
Commercial + support cases	Real money/timing constraints existed. Human support sometimes rescued cases and sometimes introduced delay or lost follow-up.	Preserve human flexibility, but remove fragile ownership and memory-dependent follow-up.
Checkout + transactions	Specific discount and checkout failures existed. An abandoned checkout showed stopping, not why.	Fix known defects; do not infer a wholesale checkout problem from abandonment alone.
Population + attendance	After reconciling the eligible population, roughly 98% reached at least part of the first live session.	Strongly weakened onboarding as the main point of large-scale loss.
Early refunds + prior cohort	Reasons were mixed; no repeatable first-live failure pattern was established.	Measure reasons consistently before redesigning the live experience.

3. Where the journey first weakens

The first repeated weakening sat at the point where prospects had to decide whether joining was right and workable now:



Among the serious prospects I could observe, people often articulated specific value: live practice, feedback, professional application and certification. Their repeated uncertainty was more practical and conditional: experience level, workload, attendance, certification, professional scope, payment options, flexibility and who could give a reliable answer.

Some of the strongest evidence appeared after purchase. Questions about mandatory live participation and certification showed that conditions affecting whether someone could realistically succeed were sometimes surfacing during onboarding. Operationally those looked like onboarding questions; commercially, they belonged earlier in the buying decision.

I also checked whether different experience levels justified separate funnels. More established and newer/developing practitioners tended to emphasise different questions, but the evidence supported answering those differences within one journey rather than splitting the funnel.

Three anonymised patterns illustrate the distinction

- A strong-fit prospect valued the programme and could make the live times, but still deferred because the wider practicalities did not line up.
- A prospect with a genuine affordability problem joined once a workable arrangement was discussed. Price clearly mattered in that case; it did not establish price as the dominant explanation across serious prospects.
- A prospect wanted to speak with someone before committing, but missed follow-up and crossed wires became part of the buying experience. That does not prove the eventual outcome was caused by support failure, but it identifies a commercially risky failure mode.

The common thread was not simply “convince me this is valuable.” It was “help me determine whether this is right and workable for me now.”

4. **Competing explanations, including the denominator check**

Finding evidence for a plausible story is easy. The more useful question is whether it explains the first repeated weakening better than the alternatives.

Hypothesis	Evidence and limit	Decision
Prospects do not understand the value	Observable serious prospects repeatedly articulated specific value. This does not prove every nonbuyer understood it.	Do not lead with a broad positioning or value-proposition rewrite.
Price is the main problem	Direct affordability cases existed, including one resolved commercially. No clean denominator showed price dominating among serious prospects who did not buy.	Capture price as a reason before making a blanket price change.
Checkout is the main leak	Real local defects existed. The evidence did not show that standard checkout failure explained large numbers of otherwise-ready buyers.	Repair specific defects; no wholesale checkout rebuild.
Onboarding is losing large numbers	Support anecdotes looked noisy, but the reconciled attendance denominator showed very little pre-opening attrition.	Fix onboarding defects; do not treat onboarding as the first major leak.
The first live session is causing mismatch	A small number of early refunds had mixed reasons. Some looked like the refund window performing final fit correction.	Measure reasons first; no redesign on current evidence.

Why onboarding moved down the list

This was the most decision-relevant analytical correction in the case.

Onboarding generated noisy evidence: access issues, calendar questions and account problems. If I had worked from anecdotes alone, “fix onboarding” would have been an easy recommendation.

Before using an attendance rate, however, the population had to be reconciled across roster, transaction and attendance sources. The records contained duplicates, corrected identities, missing participants and people who purchased after the event being measured.

53 / 54

roughly 98%

Once the eligible population for the first live session was reconstructed, 53 of 54 participants attended at least part of it, roughly 98%.

That number does not prove onboarding was frictionless, cheap to operate or well designed. It does something narrower and more useful: it strongly weakens the hypothesis that large numbers of eligible participants were failing to make it through onboarding to the opening.

Decision consequence: fix the specific onboarding defects. Do not rebuild the whole onboarding system.

This is why population before percentage matters. A clean-looking spreadsheet can still describe the wrong population.

5. Why this is a commercial problem

The symptoms crossed marketing, support, onboarding and operations. Internally, it would be easy to assign each one to a different function. The customer experiences one journey.

If a suitable prospect wants to buy but cannot reliably establish fit, attendance requirements, certification rules, payment options or what happens next, that uncertainty is part of the buying experience regardless of which team owns the answer.

The underlying constraint was decision reliability: the business was asking some prospects to do too much detective work before reaching a confident yes-now, later, or no.

Some feasibility work should remain. A substantial professional programme genuinely asks something of the buyer. The goal is not to remove every no; it is to remove avoidable uncertainty while preserving useful qualification.

6. Recommended sequence

1 Establish one version of the truth

Settle the small number of commercial and participation rules that repeatedly create uncertainty: current price and offer, enrolment deadline, late-entry rules, instalment flexibility, refund rules, attendance and certification requirements, approved exceptions and who can approve them.

Why first: a prospect-facing guide cannot be more reliable than the internal rules it draws from.

Do not overbuild this. One trusted source, one owner and a simple update rule are enough.

Done when: the current rules, owner, exception authority and update location are explicit enough that two staff members would give the same answer.

2 Turn that truth into a prospect-facing decision guide

Create one concise guide that helps a serious prospect answer the questions already appearing repeatedly: who the programme is and is not for, experience level, workload, live requirements, certification, flexibility, professional scope, payment options and when waiting is sensible.

Place the information before purchase, then reuse the same answers in sales and support. The purpose is decision support, not another block of persuasive copy.

Done when: the recurring pre-purchase questions are answered before payment and sales/support are using the same answers.

3 Close the loop when a human is still needed

Some buying decisions will remain too nuanced for self-service information. For those cases, a serious buying question needs:

- An owner
- A clear next action
- A simple way to see whether the loop was closed

This is deliberately smaller than a CRM transformation. The objective is simply to stop a call request, reply, broken booking route or exception question disappearing between people.

Done when: every serious buying question can be seen as owned, awaiting a defined next action, or closed.

7. What I would leave alone, and what I would measure next

Protected non-actions

The evidence did not currently justify:

- A blanket price cut
- Shortening the sales page simply because it is long
- Substantially more sales email
- Weakening the live or practice element
- Reducing certification requirements
- Restricting the programme only to experienced professionals
- Redesigning the curriculum
- Rebuilding checkout from scratch
- Overhauling onboarding
- Removing human flexibility
- Trying to prevent every early refund

Avoiding unsupported work is part of the value of the diagnostic. A list of possible changes is cheap. The harder task is deciding which ones the evidence currently earns.

What I would measure next

The next measurement should target the uncertainty that could actually change the diagnosis.

- **Serious prospects who do not buy:** capture one primary reason where possible: price, workload, timing, schedule, fit, experience level, professional scope, chose another option, other or unknown.
- **Serious sales/support questions:** capture what was asked, whether it was answered, approximate response time and what happened afterwards.
- **Checkout:** distinguish normal abandonment from technical errors and discount or special-price failures.
- **Early refunds:** ask one simple, non-salesy reason question so fit correction can be separated from repeatable avoidable failure.

After one or two cohorts, this should make the weighting of price, timing, workload, fit and process friction much clearer.

8. Confidence and what would change my mind

Question	Confidence	Why
Where the first meaningful weakening sits	Moderate-high	The same fit/feasibility pattern appears across customer language, support records, commercial cases and behaviour.
Whether large pre-opening onboarding attrition is the main leak	High confidence against	The reconciled attendance denominator showed very little pre-opening attrition. This does not prove onboarding is frictionless.
Exact weighting of price vs timing vs workload vs fit	Moderate	The complete denominator and primary reason for every serious nonbuyer do not exist.
Expected commercial lift from the three changes	Unknown	The changes have not yet been implemented and measured in a way that supports a lift claim.

WHAT WOULD CHANGE MY MIND

I would materially revise the diagnosis if new evidence showed that, among serious prospects, value misunderstanding dominated non-purchase; price overwhelmingly explained the decision; standard checkout failure was widespread; a repeated first-live mismatch was driving exits; or another earlier loss point consistently appeared before the right-and-workable decision.

Bottom line

First weak point	The move from understanding the value to deciding that joining is right and workable now.
First changes	Settle the rules, make them easy for prospects to use, then close the loop on cases that still need a human.
Protected non-actions	No blanket price change, broad page/email rebuild, curriculum redesign, checkout rebuild or onboarding overhaul on the current evidence.

The most valuable result was not finding more things to optimise. It was ruling enough things out to identify the smaller problem worth fixing first.

About this sample

This sample is representative of the level and style of a Conversion Journey Diagnostic written brief, not a fixed template. The structure and evidence set change with the journey. A paid diagnostic focuses on one important journey and one primary segment, narrows to a small number of supported findings and usually 1-3 changes or tests, and includes a findings call to pressure-test the diagnosis and agree the smallest useful next steps.

Steve New | Conversion Consultant for complex buying journeys
stevenew.com