LoftyBiz Warm-Audience Planner and Readiness Ladder Worksheet

Most visitors leave on the first visit, and many are still interested. Build a small shadow funnel that reminds recent visitors, with consent, a frequency cap and buyers left out. Warm cold audiences with helpful content before you ask for anything. Match each message to how ready the viewer is: help, then something useful, then a clear next step.

From LoftyBiz 170 — Bring Visitors Back: Retargeting and Warm-Audience Ads. Systex is our own product; you can find Systex at loftybiz.net, or click the link in the description.

Shadow funnel: three small groups

Group	Who is in it	Time window	Message they should see	Leave out?
Product viewers	People who viewed a product or pricing page	Last 14 days	The missing piece of information (reviews, size guide)	No — this is a warm group
Cart, did not buy	People who added something to the cart but did not buy	Last 7 days	Delivery time and easy returns. No pressure, no fake countdown	No — this is a warm group
Recent buyers	People who already bought	Leave out completely	Do not show these ads. Nobody should be chased for something they already own	Yes — leave out

Before anything else, check the basics: a clear cookie and consent notice, a privacy page that explains the ads, and the ad platform's rules. Retargeting only works fairly when visitors know about it and can say no. Keep away from anything sensitive, like health or money worries, in how you choose groups. Set a frequency cap (a few times a week; official visual example: max 3 views per person per week) and stop after fourteen days.

Readiness ladder

Step	Readiness	Who sees it	What you offer	Number to check each week
1. Cold	People who have never met you	New local or new-to-you audiences	A short, helpful video or tip — give first, do not ask first	How many people watched
2. Warm	People who already paid a little attention	Watched at least half a video, or similar	Something useful to keep (a free printable, a guide)	How many downloaded or clicked
3. Hot	People already comparing	Downloaded the useful thing, or visited a pricing page	A clear, low-risk next step (book a walk-through, finish the order)	How many booked or bought

The point is to match the message to the moment. A stranger gets help. Someone who knows you a little gets something useful to keep. Someone already comparing gets a clear, low-risk next step. Asking a cold viewer to book a meeting is like proposing on a first coffee. When someone says yes, move them out of every ad group straight away, and follow up personally.

Official worked examples (not promises)

Example	What they changed	Figures in this example
Imogen's online store in Raleigh (USA) — ergonomic desk accessories	She built a shadow funnel behind her main ads: three groups, a different message for each, a frequency cap, and buyers left out. Every two weeks she swapped the pictures and the first line, keeping the message the same.	About forty dollars a day on ads to new people. Retargeting about eight dollars a day, taken from her main budget. After two months, more visitors came back and finished their order. Cost for each sale from warm groups was roughly half the cost from cold ads. Official visual cards: cost per sale, cold ads $34; warm groups about $17; max 3 views per person per week; budget $8 a day.
Thabo's commercial cleaning company in Indianapolis (USA) — offices, clinics' waiting rooms and small warehouses	He changed the order: helpful videos first, then a free printable cleaning schedule, then the invitation to book a walk-through. Each week he checked one number per step and changed one thing at a time. When someone booked, they left every ad group. One honest rule: no ad would claim results he could not show.	About twenty-five dollars a day: around fifteen dollars for helpful videos to new people, and ten dollars for the warm and hot steps. After three months, more walk-throughs booked. Cost per booking dropped from about ninety dollars to about fifty-five. Official visual card: cost per walk-through booked, $90 to about $55.

These figures are illustrations, not a forecast for you. Your numbers will depend on your product, your prices, your market, your area, your season and many other things.

This week's task

Step	Done?	Notes
Check your consent notice and privacy page		
Create one group of people who visited your product or pricing page in the last fourteen days		
Leave out recent buyers		
Write one ad that answers their most common question		
Set a frequency cap and a small daily budget		
Review it next week		
Put that plan into Systex, so the whole team can follow the same steps		

Example figures, not targets or forecasts. General education, not financial, legal or tax advice. Results vary. These are examples, not promises.
Put this page into Systex, so the whole team can follow the same steps.