

COMPREHENSIVE CHARACTERISTICS OF THE SALES FUNNEL LEVELS TRANSFORMATION UNDER THE INFLUENCE OF DIGITAL TRENDS IN THE MARKETING SPHERE

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Abstract

The paper explores the transformation of sales funnel levels under the influence of digital trends in marketing, emphasizing the relevance of optimizing customer interaction in a rapidly changing digital environment. The purpose of the study is to refine theoretical and methodological approaches to understanding the sales funnel and to justify the necessity of its transformation according to digitalization processes. The research applies system analysis, generalization, comparative and content analysis, as well as modeling methods to study customer movement through the sales funnel and to visualize key interaction stages. The Ukrainian market situation during 2022-2023, marked by increased demand for energy equipment, illustrates the need for adaptive marketing tools. The study proposes a Customer Journey Map model for an online wholesale company as a practical example of sales funnel optimization. The findings substantiate that digital tools and CRM systems enhance communication efficiency, adaptability, and sustainable business development under the conditions of global digital transformation.

Keywords: Sales Funnel, Marketing Communications, Online Sales, Digitalisation, CRM, Optimisation, Innovative Marketing Strategies.

JEL Codes: D30, M31, M37, L14, L81, L86.

Introduction

In the era of digitalization, a company's successful commercial activity is directly dependent on the effective integration of highly optimized sales cycles, widely referred to in professional circles as "sales funnels". This process involves the systematic development of customer interaction models through well-structured stages of relationship formation and growth. At the same time, a deep understanding of digital transformation processes is crucial. This includes analyzing the fundamental characteristics of the sales funnel, its structural division into sequential stages, the classification of relevant types in the context of modern digital technologies and marketing innovations, as well

as the development of methodological foundations for creating a customized model integrated with a company's digital marketing and e-commerce tools.

Literature Review

The review of previously published studies allows us to conclude that there is a significant body of research on the impact of digital trends on the transformation of marketing processes. For example, the publications of O.V Baula et al. (Baula et al., 2024), as well as T. Bodnarchuk and O. Svider (Bodnarchuk and Svider, 2024), focus on the development of e-commerce and changes in consumer behavior in the digital environment,

which are crucial trends for restructuring the sales funnel. At the same time, the argumentation for the necessity of a comprehensive evaluation of marketing activities and the implementation of anti-crisis management solutions, presented in the work of M.O. Bahorka (Bahorka, 2023), highlights the relevance of using integrated analytical approaches to optimize marketing strategies in the context of digitalization. The textbooks and monographs by N. Letunovskaya et al. (Letunovskaya et al., 2021), A. Hanlon (Hanlon, 2022), D. Chaffey (Chaffey, 2022), K. Simon (Simon, 2021), and D.L. Rogers (Rogers, 2016) provide a solid theoretical foundation for understanding strategic planning and the integration of digital tools into marketing communications and sales funnel management. On the other hand, practical studies, such as the works of I.V. Ponomarenko and D.V. Ponomarenko (Ponomarenko and Ponomarenko, 2024), as well as N.S. Skopenko et al. (Skopenko et al., 2023), vividly illustrate the application of innovative technologies, including artificial intelligence and online merchandising, to enhance marketing activities in the digital market, which is crucial for boosting sales.

According to O. Krause and I. Pinyak (Krause and Pinyak, 2021), the sales funnel serves as an effective analytical marketing tool that allows for a detailed analysis of sales stages and enables more flexible and rapid managerial decision-making, which is a crucial factor in the development of companies in a turbulent business environment. I.I. Blahun et al. (Blahun et al., 2020) examine the role of the sales funnel as an element of company promotion, particularly during the pandemic when traditional marketing approaches underwent significant transformations, leading to an active shift toward online sales methods and digital marketing. The analysis of the AIDA model in the context of online shopping, presented by E. Hadiyati (Hadiyati, 2016), highlights the importance of optimizing the marketing mix to stimulate sales in the digital environment, which is reflected in the detailed study of each individual sales stage. The research by R.T. Wiraguna and A. Dini (Wiraguna and Dini, 2024), as well as modern analytical reviews (Empowering Consumer Behaviour: How Gen-Z is Dismantling the Marketing Funnel in 2024,

2024; Anderson, 2024), indicate the growing role of social media and influencers in shaping brand awareness through integrated sales funnel approaches. This underscores the need for a deeper examination of this area of sales funnel transformation and the development of methodological approaches for integrating them into the operations of companies of various sizes and industries.

A distinct body of knowledge and practical recommendations is presented in studies focused on integrating digital sales funnel management methods into the operations of modern companies. For instance, the scientific works of O. Polous et al. (Polous et al., 2024), and G. Golik-Górecka (Golik-Górecka, 2023) emphasize the importance of digitalization and automation, highlighting the role of information technology and web analytics in optimizing marketing strategies and crisis management in contemporary businesses. The study by T. Grublješić and N. Čampa (Grublješić and Čampa, 2016) underscores the significance of integrating information systems into CRM, particularly in the automotive industry, facilitating more efficient sales funnel management in this sector. Research by K.K. Sharma et al. (Sharma et al., 2023) demonstrates how the application of deep learning technologies for lead evaluation can significantly enhance the efficiency of the digital sales funnel through process automation. Finally, studies by A. Szymkowiak (Szymkowiak, 2019) and V. Qin et al. (Qin et al., 2024) illustrate that the use of digital tools and data for budget allocation and online sales funnel analysis is a fundamental and indispensable component of modern marketing.

Methodology

The research methodology is based on the application of a system of general and special scientific methods, ensuring the comprehensive study of the transformation of sales funnel levels under the influence of digital trends in marketing. The system analysis method was applied to examine modern global tendencies in the digitalization of marketing communications and their impact on consumer interaction at different stages of the sales cycle. The generalization method was used to summarize theoretical and practical approaches to the formation and

optimization of sales funnels in conditions of digital transformation. The comparative analysis made it possible to identify the differences between traditional and digital sales funnels, as well as to define the peculiarities of consumer behavior in the online environment.

The systematic approach ensured the consideration of the sales funnel as a structured and dynamic system that integrates marketing, analytical, and communication processes within the framework of a unified digital ecosystem. The methods of analysis and synthesis were used to determine the prerequisites, internal logic, and functional relationships between the stages of the sales funnel in e-commerce. The grouping method enabled the identification and classification of digital tools and CRM technologies that ensure the effectiveness of customer interaction management.

The inductive and deductive methods were employed to substantiate the structure and content of the mechanism of digital sales funnel transformation, as well as to formulate the principles of its practical implementation in companies operating in the B2B and B2C segments. The content analysis of scientific and analytical sources allowed for the identification of key conceptual approaches to managing the customer journey through online communication channels. Finally, graphic and modeling methods were applied to visualize the proposed Customer Journey Map and to develop a structural model of

the digital sales funnel, demonstrating the interrelation of its levels, conversion points, and feedback loops.

This comprehensive methodological approach provided the scientific basis for identifying key factors influencing the efficiency of marketing communications in a digital environment and for substantiating the need to transform sales funnel models in accordance with the requirements of the modern digital economy.

The purpose of research

The purpose of the paper is to refine and expand the theoretical and methodological approaches to defining the essence of the sales funnel and to justify the necessity of its transformation under the influence of digital trends in the field of marketing.

Research Results and Discussion

The sales funnel, also referred to as the sales tunnel or sales cycle, is an integrative model that sequentially describes the process of transforming an initial contact with a potential client into a completed transaction through the systematic application of specialized marketing tools. These tools cover the stages of awareness, interest, decision-making, action, and subsequent customer retention (Blahun et al., 2020). The segments of the sales funnel are graphically represented in a general form on Fig. 1.

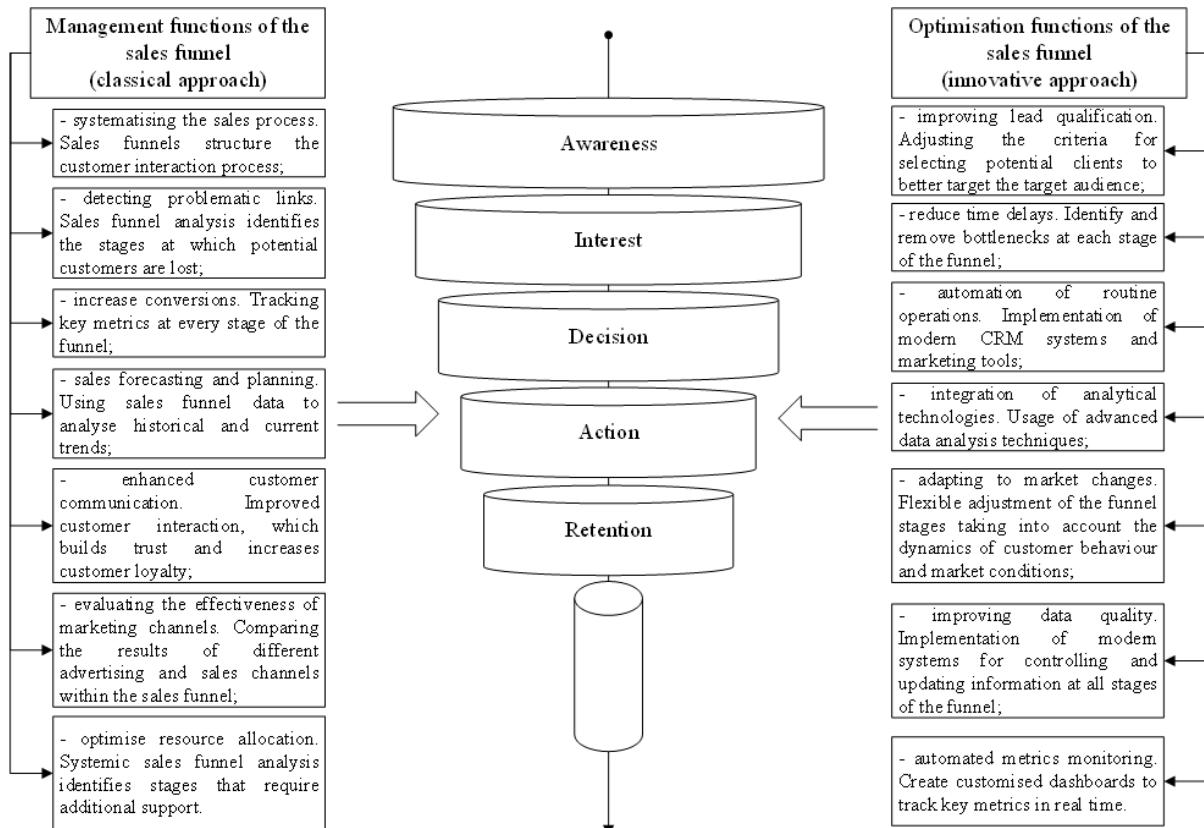


Figure 1. Conceptual model of a standard sales funnel (by segments)

*Source: improved by the authors based on (Hanlon, 2022; Krause and Pinyak, 2021; Sharma et al., 2023).

At the awareness stage, the target audience receives comprehensive information about a product or service through multichannel communication streams, including digital advertising, recommendations, search engines, and social media. This information covers technical specifications, design, cost, and operational expenses, allowing potential customers to form an initial perception of the product. Based on budgetary and functional criteria, they can then conduct a preliminary selection of available offers.

At the subsequent stages of interest and decision-making, the consumer conducts a detailed comparative analysis of the offered product against alternative options, focusing on guarantees, payment conditions, delivery, and after-sales service. Gradually, this process leads to order placement, where the efficiency of contact centers, the stability of online payments, and the reliability of logistics systems become critical factors for the successful transaction completion.

Finally, the retention stage, which represents the narrowest part of the sales funnel, requires the implementation of comprehensive

after-sales service programs and prompt support. These efforts aim to quickly resolve emerging issues, encourage repeat purchases, and foster long-term customer loyalty, which is a key factor in ensuring the company's sustained competitiveness in the rapidly evolving digital market.

It is important to understand that a customer can move forward or backward through the sales funnel or even skip certain stages. For example, at the decision-making stage, a customer may change their mind, postpone the purchase, choose a different model (if the product assortment allows), or return a previously purchased item if it does not meet their needs. At the same time, a customer might skip the first three stages and order a product immediately (e.g., when purchasing a previously well-known product) if they do so based on a recommendation from a trusted specialist or friend, considering the product to be of high quality and beneficial. Moreover, several experts have highlighted the situation in the Ukrainian market (2022–2023), when, amid prolonged rolling blackouts caused by the military-political situation in Ukraine,

consumers—especially store owners—were massively purchasing charging stations, generators, and electric flashlights. However, many of them lacked an understanding of these products' capabilities, operating conditions, and whether they could effectively address their needs (Bahorka, 2023).

Since the beginning of summer 2022, there has been a significant increase in the volume of generator imports to Ukraine. In particular, during the autumn period, this growth showed a tendency to double each month (Fig. 2). The highest demand was observed for gasoline generators with a capacity of up to 7.5 kW, which accounted for over 80% of all imported devices, indicating

their strong consumer appeal. These generators are optimally suited for ensuring power supply to private households and small businesses, particularly coffee shops, where high mobility, autonomy, and operational stability are key requirements (Official website of the State Customs Service of Ukraine). Furthermore, the surge in demand for generators can be interpreted not only as a response to energy supply instability but also as part of a broader trend toward investing in equipment capable of ensuring uninterrupted business operations and the continuous functioning of critical infrastructure under any conditions. This reflects a highly rational consumer response to the current realities.

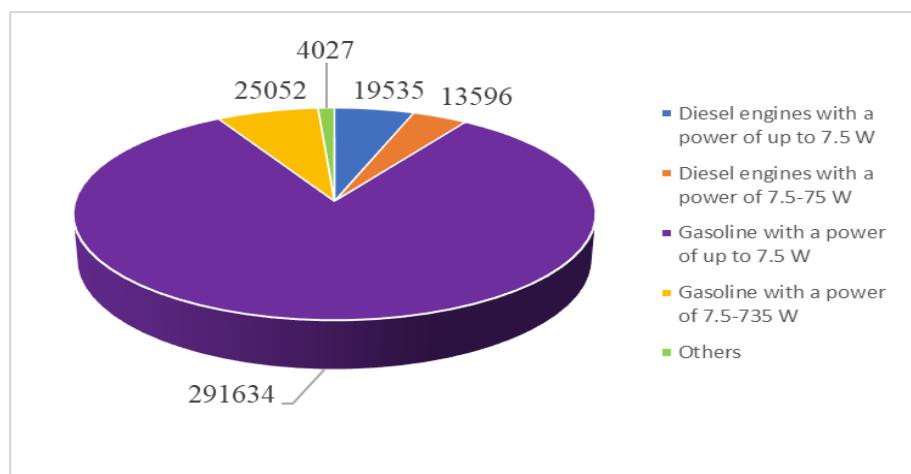


Figure 2. Number of generators imported to Ukraine, by type, pieces, 11 months of 2022

*Source: compiled based on data from the State Customs Service of Ukraine (Official website of the State Customs Service of Ukraine).

At the same time, it is important to note that the significant demand for the purchase and use of electric generators in Ukrainian cities, primarily driven by power supply disruptions, has led to an increase in harmful emissions into the atmosphere. This may negatively impact public health, particularly for individuals suffering from asthma and cardiovascular diseases. Currently, the lack of specific data makes it difficult to assess the full scale of the environmental impact. However, it is evident that prolonged use of generators will require the development of strategies to minimize their negative effects on the environment and public health, this, in turn, highlights the growing demand for the

development of more environmentally friendly models (Malokhatko and Kravchenko, 2022).

In the works of several foreign and domestic scholars and practitioners (Blahun et al., 2020; Grublješić and Čampa, 2016; Letunovskaya et al., 2021), it is noted that there are multiple types of sales funnels, which are used depending on specific needs, desired outcomes, analytical data, and the nature of the business. Among them, the most common types include the classic sales funnel, the branched sales funnel, the feedback-based sales funnel (including the automated marketing funnel and the B2B sales funnel), and others.

The aforementioned types of sales funnels can vary, as previously noted, depending on a company's specific situation and needs. In practice, businesses can create their own unique sales funnel, tailoring it as much as possible to their individual business and customer requirements. Moreover, in practical operations, modern companies should utilize multiple types of sales funnels, as it is unlikely that a single funnel can effectively drive first-time purchases, re-engage lost prospects, and motivate loyal customers to make repeat purchases all at once.

It should be noted that almost any model of business system efficiency can be visually represented as a sales funnel (Baula et al, 2024;

Szymkowiak, 2019). It is important to understand that sales management is the process of transitioning a customer's status from "potential" to "buyer", who has completed a purchase. It is quite evident that if the concept of determining an equilibrium market position is based on "finding a balance between the economic interests of conflicting parties", then the sales funnel, as an analytical tool, can be applied not only in the sales domain.

Fig. 3 presents the components of the e-commerce sector in the modern market under the influence of digitalization processes and their correlation with the segments of the sales funnel.

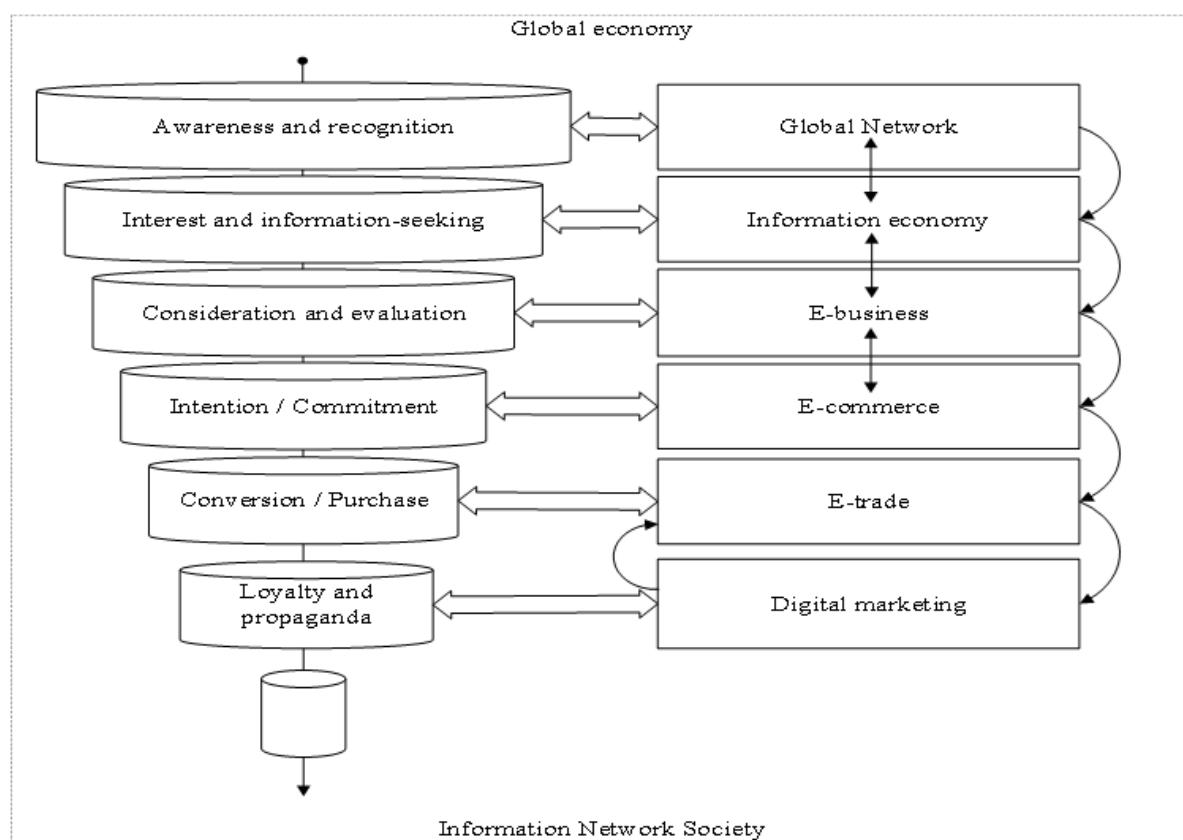


Figure 3. Correlation of e-commerce components with sales funnel segments

*Source: improved by the authors based on (Bodnarchuk and Svider, 2024; Chaffey, 2022).

Thus, in the context of e-commerce, consumers systematically go through a multi-stage purchasing model known as the sales funnel, which encompasses the entire spectrum of interaction—from initial product awareness to the final transaction. The process of each potential customer sequentially progressing through individual segments of this model, ultimately

converting into a buyer, is largely determined by the principle of convergence. This principle implies a high level of engagement and active participation, which is empirically expressed through the conversion rate (Hadiyati, 2016; Ponomarenko and Ponomarenko, 2024). It is worth noting that within traditional approaches to evaluating the efficiency of production processes,

a similar indicator is the coefficient of performance (COP), which reflects the ratio of achieved results to resources expended.

Modern web platforms in the sales sector are characterized by the presence of multiple interactive conversion points, ranging from the integration of specialized tags and widgets to the implementation of subscription mechanisms, dynamic pop-up windows, and automated chatbots that enhance user engagement. The quantitative measurement of visitor numbers at various levels of the sales funnel is conducted using analytical tools, among which Google Analytics and AdWords are the most well-known. These tools can monitor conversions directly within the context of advertising systems (Rogers, 2016).

Additionally, comprehensive statistics are collected on inquiries and incoming requests received via email, as well as phone calls. This allows for the integration of various communication channels into a unified analytical system. Modern companies collect and analyze these data metrics on an almost daily basis, ensuring the prompt acquisition of up-to-date information for adjusting tactical and strategic marketing decisions. In the practice of companies from leading developed countries, statistical data collection is conducted on a weekly and monthly basis to obtain a comprehensive view of commercial management efficiency. This approach facilitates an in-depth analysis of key performance indicator (KPI) dynamics.

The systematic approach described above allows for a detailed identification of the stages within the sales funnel where significant customer base attrition occurs. This is critically important for the subsequent optimization of interaction processes, as the primary goal of sales funnel modeling is to provide a comprehensive understanding of how the chosen strategy aligns with key objectives, such as customer acquisition, retention, and the further development of physical product distribution channels.

It should be noted, referring to the results of empirical research (Skopenko et al., 2023), that analyzing the sales funnel within the broader marketing model (Fig. 3) provides valuable

insights for optimizing interactions with the target audience:

- the funnel model enables a detailed analysis of target audience behavior across various digital platforms, including websites, online marketplaces, and physical points of sale;

- this model facilitates the development and structuring of complex interaction processes, helping to establish qualified partnerships with both potential and existing clients;

- it allows for a comprehensive analysis of the conversion rate at both individual stages and as a whole, contributing to a more accurate assessment of marketing activity effectiveness;

- an integrated approach based on the sales funnel model helps identify critical bottlenecks or weak links in the sales chain, ensuring timely strategy adjustments to minimize customer losses.

In the modern market environment, which is continuously transforming and characterized by a clear dominance of demand over supply, capturing the attention of potential buyers has become a significantly more complex and multifaceted task. This challenge requires the implementation of innovative strategies and high-tech sales communication tools (Polous et al., 2024). A comprehensive, methodologically grounded analysis of the structural components of the sales funnel enables businesses to optimally adapt their product offerings to the specific needs of the target audience. This, in turn, contributes to the creation of a compelling and personalized commercial proposal for consumers. Thus, the sales funnel serves as a conceptual model that outlines the multi-stage journey a potential customer undergoes—from developing an initial interest in a product or service to making the actual purchase, this model allows for a thorough evaluation and optimization of the effectiveness of applied marketing efforts.

The Customer Journey Map is a schematic representation of key touchpoints and various aspects of consumer interaction with different projects, illustrating the complexity of their experience in the modern market environment. This concept includes the user's registration on the company's web platform, structured in the form of a sales funnel model, as clearly depicted in Fig. 3 (marketing funnel), facilitating the

visualization of the sequential stages of interaction. At the same time, the customer's "journey" through the sales funnel takes into account a wide range of customer characteristics, including their purchase goals, motivations driving the purchase decision, the dynamics of emotional reactions during the selection process, and prior purchasing experience – all of which help predict future consumer behavior.

We propose modeling a Customer Journey Map for a wholesale company specializing in the sale of stationery products (Fig. 4). It is assumed that this company distributes its products through an online store, enabling multichannel interaction with consumers in a digital environment. At the first stage of the sales funnel, the primary focus is on overall sales performance and acquired customers, allowing the company to assess the total revenue generated by the platform and evaluate the effectiveness of customer interaction efforts by sales managers.

For a comprehensive analysis of sales funnel efficiency, relying solely on two basic metrics is insufficient. This necessitates the use of more detailed performance indicators and advanced analytical tools. It is assumed that the studied company, with its extensive network of retail stores alongside its own online store, attracts consumers through the integration of search engine services, contributing to the development of a multichannel marketing strategy.

Let's consider a situation where a customer initiates a purchase through the Google search engine, responding to contextual targeted advertising, which demonstrates the effectiveness of modern digital promotion tools. Before

purchasing stationery products, the consumer conducts a detailed online search, comparing prices and quality across various offers to maximize personal benefits. As a result of this consumer decision-making process, the sales funnel takes the form of a sequential model, as illustrated in Fig. 4.

Suppose that after conducting a preliminary analysis, the buyer develops a strong interest in a specific product and begins a detailed comparison of available offers, evaluating the unique advantages of each option. As a result of this analysis, the consumer adds the selected product to the shopping cart, indicating a transition from the interest stage to the intent stage, which is recorded in the company's analytics system. The sales funnel model, presented in Fig. 4, illustrates the sequential structuring of stages from the initial contact to order placement, enabling the identification of potential bottlenecks in the conversion process.

After the customer adds the product to the shopping cart, the process moves to the next critically important stage - calculating economic efficiency, which includes an analysis of logistics costs, delivery fees, and other associated expenses. Suppose the potential buyer initiates contact with a sales manager to clarify order details, such as the possibility of delivery to another city or the availability of additional services, contributing to the personalization of the offer. In this case, the digital analysis presented in Fig. 4 illustrates the integration of data on communication and logistics processes, ensuring the successful completion of the transaction.

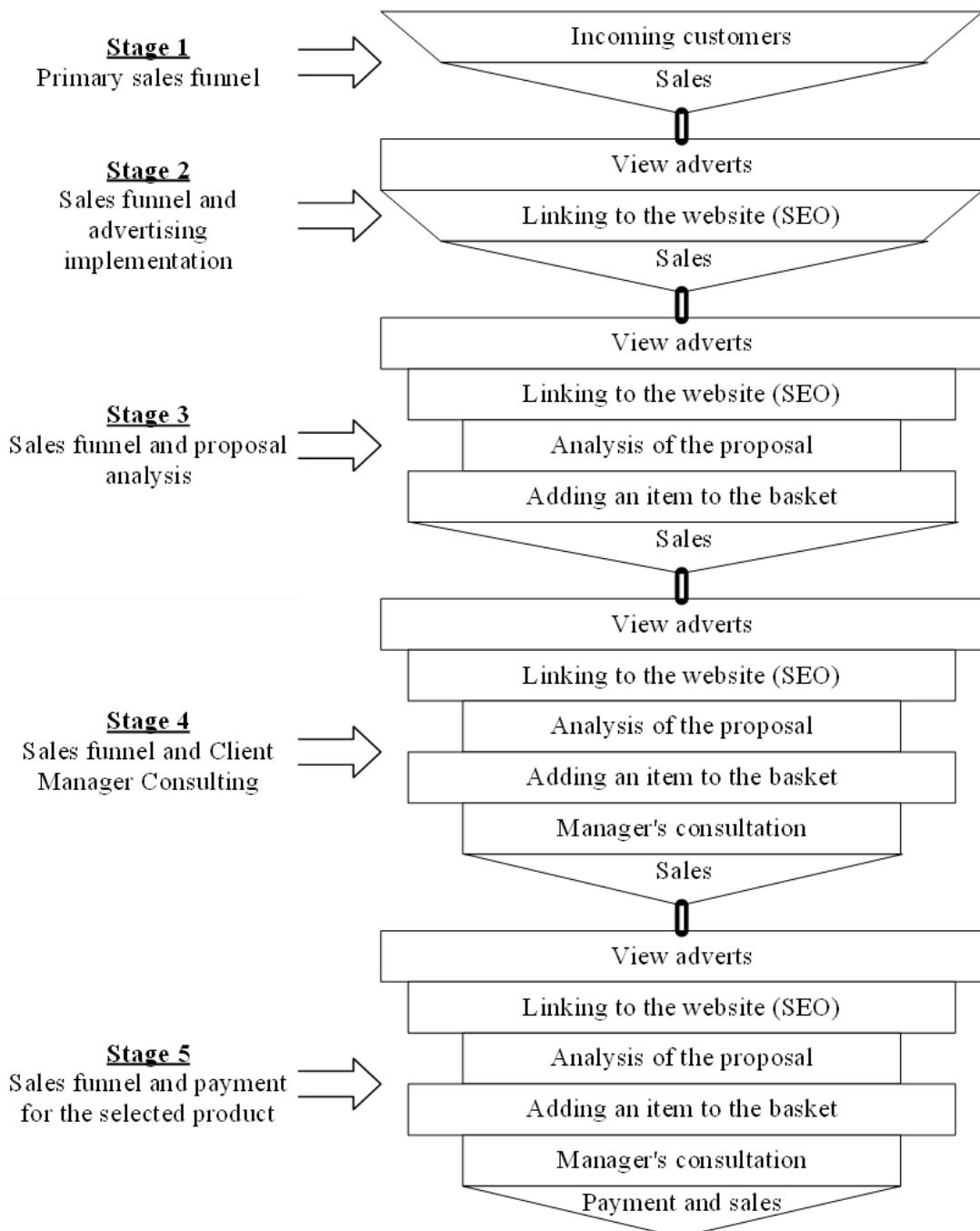


Figure 4. Modeling a Customer Journey Map for a wholesale company specializing in the sale of stationery products using a sales funnel

*Source: author's approach.

The next stage is payment, where the customer completes the transaction, finalizing the conversion process within e-commerce. The efficiency of this stage is under strict control by the sales department, which ensures the reliable operation of payment systems and the prompt processing of orders.

Thus, the analysis of various sales funnel types using the example of a wholesale company specializing in stationery sales reveals the existence of an additional model variation, which reflects the importance of customer feedback. The purpose of developing this sales funnel is to engage consumers with new product offerings, ultimately leading to increased sales volumes and

greater business economic efficiency through optimized marketing communications. Ultimately, a deep understanding of all sales funnel stages enables businesses to more accurately interpret potential customer preferences, reach a wider audience, and identify problem areas affecting the efficiency of advertising investments.

It should be noted that within the framework of digital transformation, the sales process conditions have changed significantly. While the marketing funnel in the digital environment has retained its core segments, its structure has evolved, adopting a more digitized form (Fig. 5).

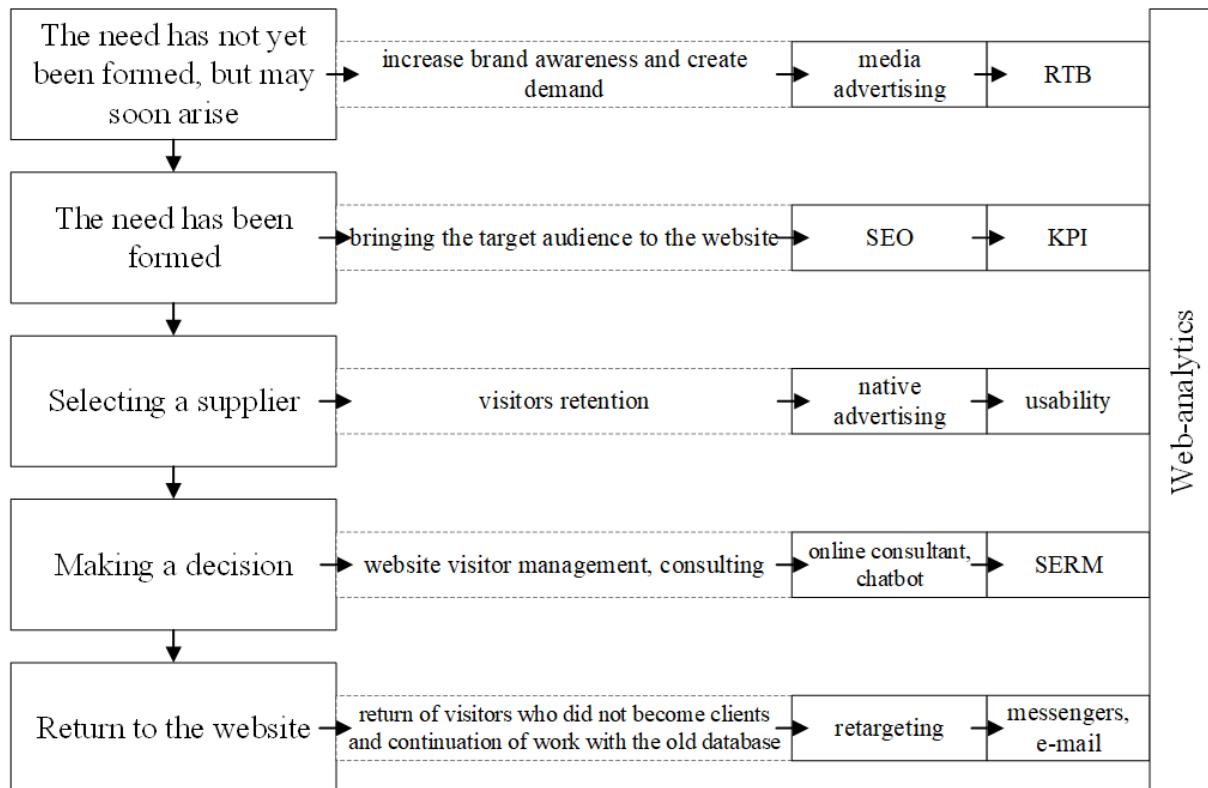


Figure 5. Modifying the sales funnel using digital components

*Source: author's approach.

As a result of digital transformations and the increasing complexity of marketing processes, the functional areas of responsibility for CRM marketers have undergone significant changes, as clearly illustrated in Fig. 6. In the context of deep digitalization, the modern responsibilities of a CRM marketer include:

- ensuring high conversion rates through strategic relationship building based on specialized conceptual approaches;
- developing and implementing partnership models in accordance with theories and principles of extended marketing influence, with the mandatory use of engagement technologies based on the principles of convergence (Simon, 2021).

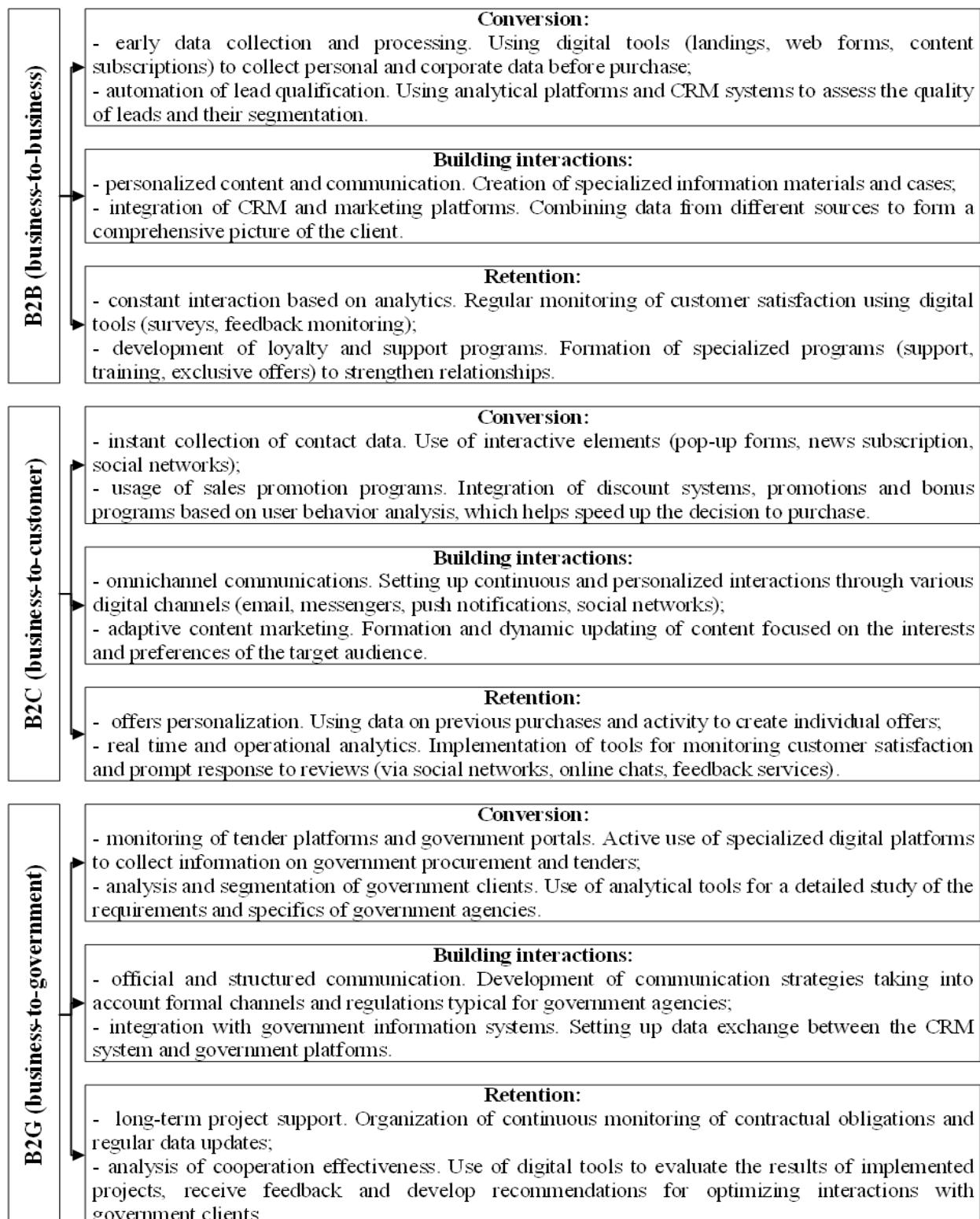


Figure 6. Transforming the marketer's areas of responsibility in the digital marketing environment

*Source: improved by the authors based on (Anderson, 2024; *Empowering Consumer Behaviour: How Gen-Z is Dismantling the Marketing Funnel in 2024*, 2024)

For the successful implementation of these functional areas, it is essential to operate with highly accurate and verified data. The specificity and depth of customer and buyer data analysis depend on the nature of the business and the characteristics of market segments. Additionally, it should be noted that the structure of the sales funnel is flexible and can transform, expand, or contract depending on the specifics of interaction with different customer types, whether in B2B, B2C, or B2G segments (Qin et al., 2024).

As mentioned earlier, the sales funnel consists of external and internal stages. The journey begins in the external funnel, where the audience is not yet familiar with the product or service, and ends with interaction between managers and buyers within the internal funnel. Fig. 7 presents the structural composition of the sales funnel, incorporating a software management algorithm for its stages.

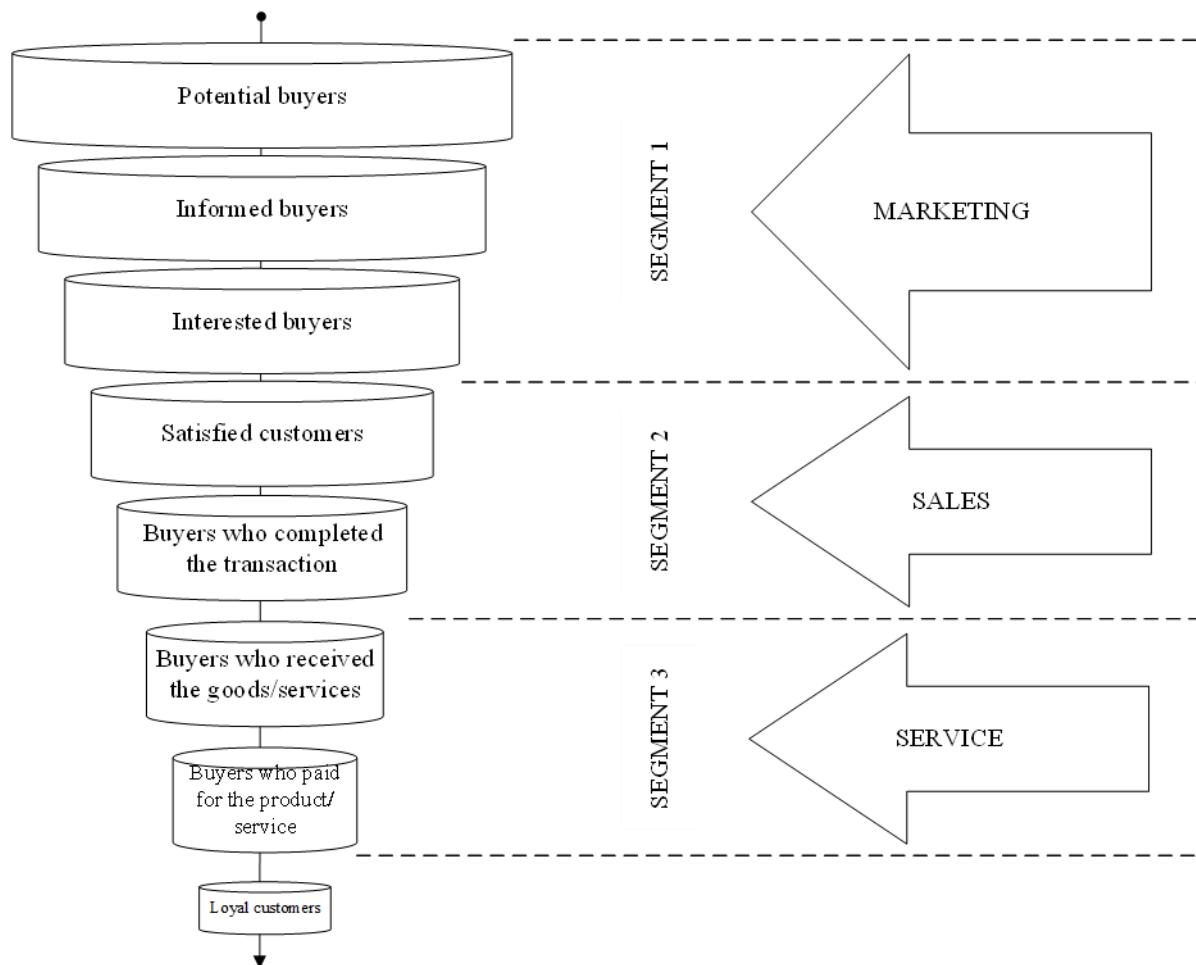


Figure 7. Sales funnel in the CRM subsystem of the BAS programme

*Source: compiled based on data from (Golik-Górecka, 2023; Wiraguna and Dini, 2024).

From the information provided on Fig. 6, it follows that a Customer Relationship Management System (CRM) can help streamline the analysis process. A CRM system is an enterprise application software designed to automate a company's customer interaction strategy by incorporating elements and principles of relationship and partnership management. Its primary functions include enhancing sales

processes, optimizing marketing strategies, including digital marketing and e-commerce, improving customer service by storing customer data and tracking interaction history, establishing and refining business processes, analyzing results for continuous improvement.

In a CRM system, data is not stored in massive spreadsheets but in user-friendly customer profiles, where the entire interaction

history is presented in chronological order - from the first call to the final purchase. The system automatically generates documents based on templates, assigns tasks to managers for each stage of the deal, sends SMS notifications to clients, and, during the payment process, creates invoices and comprehensive reports on all business metrics - from total transaction amounts to the number of completed calls. All of this helps businesses build more effective customer communication, maintain customer loyalty, and ultimately increase sales volumes.

A CRM system enables businesses to effectively address the following tasks:

- implementing unified work standards and centralized customer and transaction data storage. For example, if one employee is unavailable, another can answer the client's call by accessing their customer profile;

- processing order payments, assigning responsible managers, and setting tasks for them at each stage of the sales process, while also notifying management if a task is overdue;

- providing company leadership with comprehensive reports on employee performance, including the number of calls, meetings, and completed deals;

- setting access rights within the system and the database. For instance, a sales manager can only view their assigned clients.

Conclusions

Digital transformation in the economy is a complex process, as organizations' commercial activities are always influenced by competitive market factors, at the same time, e-commerce represents the next stage of development and a key trend for the foreseeable future, one that businesses cannot afford to ignore. Additionally, changes in the business landscape present new

challenges for marketers and entrepreneurs, particularly in sales, where leveraging the rapid surge in online consumer interactions has become essential. Moreover, the realities of digital transformation necessitate the use of scientific and mathematical methods to optimize key economic performance indicators for any business. These global shifts in business interactions are driving the emergence of innovative tools, particularly in internet and digital marketing, aimed at assessing business performance and transforming traditional methodologies to align more effectively with the new market realities.

As a result of the conducted study, a comprehensive characteristics of the levels, segments, and stages of the sales funnel was presented, along with the identification of modern methodological approaches to shaping a sales marketing strategy adapted to the realities of the digital environment. The modern digital ecosystem offers extensive opportunities for business development while simultaneously imposing higher demands on company management in terms of acquiring new knowledge and competencies. This is critically important for building a sustainable and competitive business model in an environment of high uncertainty, rapid changes, and numerous associated risks. Before launching any commercial project, including online ventures, it is essential to clearly define objectives, thoroughly analyze possible ways to achieve them, conduct a detailed assessment of potential risks, and develop a strategic concept for future growth based on comprehensive analytical research. Thus, the transformation of management and marketing activities through the integration of sales funnel principles has become particularly relevant today, enhancing business efficiency and competitiveness in the rapidly evolving digital economy.

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