



## Five-Point Initial Consultation Checklist

*Supercharge your initial prospect meeting in 10 minutes or less*

Knowing your prospect before you conduct an initial consultation is key. This 5-point process is designed to prepare you for your meeting, and give you a great overview of how this prospect is doing in comparison to our Local Marketing Stack.

**Once you complete this checklist, come back to this section and ask yourself the following questions:**

- Have you made a list of at least one, preferably two questions to ask your prospect about each area of the marketing stack?
- Do you have a good feel for how the prospect is doing right now in terms of conquering each step of the customer journey?
- Is this prospect a savvy marketer, a novice, or somewhere in between?
- Do you have a list of strengths that you can compliment your prospect on?
- Are you prepared to take meeting notes in a formatted way?

### Step One:

#### **Review their Google listing**

- Is it claimed?
- Is it managed? Are their hours & contact information listed, posted images, and are there any updates posted?
- Is the messenger feature turned on?
- Are they using the Q&A function?
- What's their star rating on Google?
- When was their last review?
- How long did it take them to respond?
- Are they responding to both positive and negative reviews?
- Are the responses meaningful and personal?
- Did they show up in the local pack when you searched for their business category & added the geo?





## Step Two:

### **Review their Yelp listing**

- Do they have one?
- Is it claimed?
- Is it managed?

*How to know: If they aren't managing it, you'll see that Yelp is inviting you, the viewer, to get a quote from a similar business, but not the one you're looking at.*

- When was their last review?
- How long did it take them to respond?
- Are they responding to both positive and negative reviews?
- Are the responses meaningful and personal?
- Now do an organic search on Yelp. Search for their business category + geo
- Are they advertising? (You'll know from the previous organic search)
- Do they spend money on a Yelp enhanced profile? (*You'll know if there aren't any competitor ads on their listing*)

## Step Three:

### **Check out their Social Media Pages**

Have a quick look at their FB, Instagram, Twitter, and company LinkedIn pages.

What You're looking for:

- How do the pages look? Are all of the fields completed? (about, description, contact)
- Are images formatted correctly? (*Look for graphic design opportunities*)
- How often are they posting?
- What's the mix of content they're posting? (Awareness, Promotion, Behind-the-Scenes)
- Are they making and posting videos?
- What's their audience size?
- Do they have engagement with the audience?





## **Step Four:**

### **Dive Into Their Website**

Who is this prospect? What do they do? Spend one minute reading their website to find out.

Did you have a good user experience on their site?

Run a website analysis tool.

*Alpha SEO, Net Success, Boostability, MarketGoo, or any other tools that you may have access to. You'll get an idea of the kind of service they may or may not be getting on their site from their current provider, if you run a scan.*

- When was the last time they updated their website?
- Is the copyright up to date?
- When does the domain expire?
- Is there an SSL?
- Is it mobile friendly?
- Are there great CTA's to help with conversion?
- Do they have a chatbot or other form of engagement?
- Is it a WordPress or DIY site (Wix, Squarespace) - this can give you information about their mindset/budget.

## **Step Five:**

### **Inspect Their SEO**

Open an incognito/private browser window and search for the prospect's business category along with the geo and see how they fare. Keep in mind that when you do your Snapshot report, you'll have a bit more information about how the website's SEO stacks up against the prospect's local competition.

Here are some general searches you want to run in your incognito window:

- Branded Search: Company name
- Branded Search: Company name + City & State
- Business category + City & State
- Their primary service + City & State

