



General Business Information

Date of interview:

Company name:

Business address:

City & state:

Business phone number:

Business email:

Is it a branded email address?

Contact person name:

Contact phone number:

Contact email:

Link to website:

Other important link(s):

Brief description of business/services/products:

User and business added to Vendasta Partner Center?

Run a [Snapshot Report](#) in Partner Center, request an Alpha SEO proposal, and a [Google Lighthouse report](#). **Continue filling out this document while data collects.** Further instructions for this step later.



Google Business Listing

Snapshot Report listings grade:

Do they have a Google Business Listing?

If yes...

Paste the link here:

Is it [claimed](#)?

Under what email?

What is their business category listed as?

Does this appear to be the correct category?

On their listing, do they show...

Business hours?

Phone number?

Business address or service area?

Photos posted by the owners?

Description of business/services?

Social accounts?

Q&A?

When did they last post an update to their Google Business Profile?



Reputation

Snapshot Report review grade:

Google Reviews

Do they have reviews on Google?

If yes...

Star rating:

Number of reviews:

Date of most recent review:

Are they responding to positive reviews?

Are they responding to negative reviews?

Notes:

Facebook Reviews

Do they have reviews on Facebook?

If yes...

Are they recommended?

Number of reviews:

Are they responding to positive reviews?

Are they responding to negative reviews?

Notes:



Yelp Listing

Do they have a Yelp page?

Is the listing claimed?

Does the listing prompt you to reach out to similar businesses for a quote?

Are there competitor ads on their listing?

Does the listing look completed?

Do they have reviews on Yelp?

If yes...

Star rating:

Number of reviews:

Are they responding to positive reviews?

Are they responding to negative reviews?

Notes:

Search their business category + their location on Yelp.

Are they a 'sponsored' business?

Do they show up on the first page of Yelp?



Social Media

Snapshot Report social grade:

Link to Facebook:

Link to Instagram:

Link to LinkedIn:

Link to Twitter:

Link to Youtube:

Other social link(s):

Number of followers across all platforms:

Are they actively posting to their social media pages? (leave as 'select one' if N/A)

Facebook:

Instagram:

LinkedIn:

Twitter:

Youtube:

Other:

If yes...

Is their content aesthetically pleasing and professional-looking?

Are they posting videos?

Are they engaging with their followers or viewers?

Are their social accounts listed on their website?



Website

Snapshot Report website grade:

Did the page load quickly?

Is their website mobile-friendly?

Is their website user-friendly all around?

Is their website easy to navigate?

Does their homepage hero clearly state what they do?

Is their website aesthetically pleasing?

Do their social media pages and website match branding-wise?

Are the images on the site high quality?

Do they have a favicon?

[On what platform](#) their website built?

[Do they have](#) an SSL?

Are they using an accessibility widget/plugin?

Do they have a privacy policy?

Do they have a terms of use or terms of service?

Is their copyright up to date?

Are they using a chatbot or other form of engagement?

Do they have a contact form?

Are they using good CTAs throughout the site?



Search Engine Optimization (SEO)

Google Lighthouse SEO grade:

Snapshot Report SEO grade:

Request a proposal from Alpha SEO. Paste the proposal here.

In an incognito browser, search...

The business name. Are they the first search result?

The business name. Are they on the first page of Google?

Ranking:

The business name + location. Are they the first search result?

The business name + location. Are they on the first page of Google?

Ranking:

The business category + location. Are they in the Local Pack?

The business category + location. Are they on the first page of Google?

Ranking:

Their primary service + location. Are they in the Local Pack?

Their primary service + location. Are they on the first page of Google?

Ranking:



Final Preparations

Some potential topics:

- What questions would you want to ask your prospect?
- 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?
- Is this prospect a good fit for your agency?
- What would be your top 3 priorities if this prospect becomes a client?

Refer to your Google Lighthouse report. Paste the link here.

Refer to your Snapshot Report in Partner Center. Send the results to **[your email here]**.

How can we help this prospect?

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