



ClearSKai

TECHNOLOGIES

Where the SKai isn't the limit, it's the starting point.

LEAD AUDIT

Free Lead Audit Worksheet

Inspection-style worksheet for proving website, mobile, Google, social, tracking, and missed-lead problems before recommending a package.

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PREPARED FOR

CLIENT NAME & COMPANY

PROJECT / BUILD NAME

CLIENT EMAIL



FIELD AUDIT

Business Snapshot

Complete before scoring. This document helps the sales team prove the problem before selling the solution.

BUSINESS NAME

WEBSITE URL

CONTACT NAME

AUDIT DATE

PHONE

EMAIL

TRADE / INDUSTRY

SERVICE AREA

Scoring Guide

Score each item 0 to 5. A 0 means missing or broken. A 5 means clean, trustworthy, and conversion-ready. Capture screenshots when possible.



SCORECARD

Website, Mobile & Lead Capture

Score the website and note what is costing the client leads.

Audit Item	Score 0-5	Problem Found	Recommended Fix

Suggested Items

Website trust, mobile experience, load speed, above-the-fold CTA, call button, form working, service pages, review/social proof.



SCORECARD

Google Business, Reviews & Social Presence

Document local trust, reputation, and ranking opportunities.

Audit Item	Score 0-5	Problem Found	Recommended Fix

Suggested Items

GBP claimed, review count/rating, photos updated, service areas, posts active, Facebook active, Instagram active, competitors ranking above them.



FINDINGS

Competitors & Missed Lead Opportunities

Show exactly where the business is leaking attention and calls.

Competitor	What They Do Better	Ranking / Notes	Opportunity

Missed Lead Opportunities

Problem Found	Severity	Estimated Impact	Fix / Recommendation



Problem Found	Severity	Estimated Impact	Fix / Recommendation



RECOMMENDATION

Priority Fixes & Package Fit

Turn the audit into a clean recommendation for the client.

Priority Fixes

Priority	Fix Needed	Package Fit	Notes

Recommended Package

Contractor Starter

Lead Machine

Authority Package

Custom

WHY THIS PACKAGE / CLOSING NOTES



NEXT STEP

SALES REP

FOLLOW-UP DATE

CLIENT INITIALS