

# CLIENT ACQUISITION DIAGNOSTIC CHECKLIST

**“You can’t win the clients  
who can’t find you.”**

*Use this checklist to pinpoint the hidden barriers  
stopping your business from attracting, converting,  
and keeping new clients.*

# **VISIBILITY**

## Can your ideal clients actually find you?

- Appearng on Google for key services (e.g. "Accountant Cardiff" or "Leadership Expert in Bristol")
- Consistent posting and engagement on LinkedIn or other relevant platforms
- Listed in trusted local or industry directories (e.g. Find a Business Expert)
- Getting regular traffic to your website or digital assets
- Visibility data tracked (Google Analytics, search console, etc.)
- Active network or referral activity beyond existing clients
- Personal brand clearly visible and discoverable

**Score** (0-7): \_\_\_ /7

**If under 4** – you're invisible to most potential buyers.

# □ TRUST

## When they find you, do they believe in you?

- ✓ Strong, professional, and fast website experience
- ✓ Clear positioning — prospects can instantly tell who you help and how
- ✓ Reviews, testimonials, or case studies visible online
- ✓ Consistent branding and tone across platforms
- ✓ Expert content that builds authority (blogs, guides, podcasts, etc.)
- ✓ Clear pricing or process that builds confidence
- ✓ Evidence of past results or collaborations

**Score** (0-7): \_\_\_ /7

**If under 4** — prospects won't choose you even when they find you.

# □ CONVERSION

## Are you turning conversations into clients?

- ✓ Fast follow-up and response time to enquiries
- ✓ Structured discovery or consultation process
- ✓ Confident sales conversations (focus on client outcomes, not features)
- ✓ Clear offers and next steps for prospects
- ✓ CRM or system for tracking leads and follow-ups
- ✓ Nurture sequence for cold or delayed leads
- ✓ You measure and improve conversion rates

**Score** (0-7): \_\_\_ /7

**If under 4** —you're leaving money on the table.

# **SYSTEMS & STRATEGY**

## **Do you have a predictable growth engine?**

- Clear marketing and sales strategy with monthly goals
- Automated systems for email, follow-up, or lead capture
- Consistent tracking of KPIs (cost per lead, ROI, etc.)
- Marketing and sales aligned – smooth handovers
- Budget and time allocated consistently to client acquisition
- Data-driven decision-making
- Documented client journey from awareness to referral

**Score (0-7):** \_\_\_ /7

**If under 4** –your growth depends on luck, not a system.

## **MINDSET & CONFIDENCE**

### **Are you consistent and confident showing up?**

- Comfortable promoting your expertise publicly
- Confident in pricing and positioning your value
- Proactive about asking for testimonials or referrals
- Consistent weekly marketing habits
- Not distracted by “shiny object” marketing tactics
- Strong support network or community around you
- Regularly review performance and celebrate wins

**Score (0-7):** \_\_\_ /7

***If under 4*** – your mindset is limiting your marketing momentum.

# RESULTS SUMMARY

CATEGORY	SCORE	HEALTH CHECK
Visibility	/7	
Trust	/7	
Conversion	/7	
Systems & Strategy	/7	
Mindset & Confidence	/7	
<b>Total Score</b>	/35	

- **0–14: High Friction** — You're working hard but invisible or inconsistent.
- **15–24: Building Momentum** — Good foundations, needs structure and consistency.
- **25–35: Growth Ready** — Strong setup, focus on scaling and collaboration.