

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?

- ✓ Appearing 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	
Total Score	/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.