

# Traffic-to-sale diagnostic

Find the first meaningful obstacle between an appropriate visit and a sale.

## 1 / DEFINE THE PATH

Customer segment and reason for visiting:

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One landing page and one intended next action:

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Observation period and data source:

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## 2 / RECORD THE EVIDENCE

Relevant sessions: \_\_\_\_ Inquiry starts: \_\_\_\_ Submissions: \_\_\_\_

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Qualified inquiries: \_\_\_\_ Sales from this inquiry cohort: \_\_\_\_

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Known tracking gaps or sales-cycle delay:

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## 3 / CHECK THE EXPERIENCE

Test submission/purchase completed? What actually happened?

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Exact point of confusion observed, and evidence source:

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Alternative explanation we still need to check:

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## 4 / CHOOSE ONE CHANGE

Proposed change and why it addresses the evidence:

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Primary outcome + denominator + review window:

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Guardrail, owner, and next review date:

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# Service offer clarity worksheet

Make the first purchase understandable to the right buyer.

## 1 / NAME THE BUYING SITUATION

Who is this for, and what has happened in their world?

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What have they tried, and what progress do they need?

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## 2 / WRITE THE OFFER

We help \_\_\_\_\_ address \_\_\_\_\_

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through \_\_\_\_\_ so they can \_\_\_\_\_

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The engagement delivers \_\_\_\_\_

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## 3 / SET EXPECTATIONS

Customer inputs and prerequisites:

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Included / excluded / expected timeline:

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Price basis, final quote point, and payment expectations:

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## 4 / TEST COMPREHENSION

After reading, can a prospect explain the work and next step?

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Which unanswered question did they raise?

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One revision to make; owner and review date:

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# Lead nurture sequence planner

Help an interested prospect resolve the next buying question.

## 1 / ENTRY AND OWNERSHIP

Inquiry type, contact eligibility, and known context:

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Human owner and response expectation:

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## 2 / MAP THE CONVERSATION

1. Answer the request: what question must be resolved?

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2. Useful diagnostic: what can the reader check?

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3. Example: what permitted sample makes the work concrete?

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4. Objection: what concern has the person actually raised?

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5. Close the loop: when should follow-up pause?

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## 3 / PROTECT RELEVANCE

Pause/exit for reply, booking, purchase, decline, or opt-out:

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Verified destinations and message timing:

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Successful tests for reply, conversion, and opt-out paths:

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## 4 / MEASURE DECISIONS

Useful replies: \_\_\_\_ Qualified meetings: \_\_\_\_ Sales: \_\_\_\_

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Opt-outs/complaints and team time:

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What the next batch should change:

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# Email outcome and measurement brief

Separate attribution credit from additional business impact.

## 1 / NAME THE INTENDED RESULT

Eligible population and intended useful action:

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Measurement window and primary outcome:

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Attribution model, window, and reporting source:

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## 2 / DESIGN THE COMPARISON

Optional campaign being tested; essential messages preserved:

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Randomization unit, assignment, sample plan, and owner:

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Effect worth detecting and uncertainty we can accept:

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## 3 / RECORD COUNTS AND ECONOMICS

Treatment: assigned \_\_\_\_ outcomes \_\_\_\_ rate \_\_\_\_

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Control: assigned \_\_\_\_ outcomes \_\_\_\_ rate \_\_\_\_

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Difference in percentage points \_\_\_\_ uncertainty \_\_\_\_

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Realized contribution after variable costs \_\_\_\_ campaign cost \_\_\_\_

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## 4 / INTERPRET AND DECIDE

Other exposures, delayed purchases, returns, and limitations:

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Guardrails and any harm to customer experience:

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Keep / revise / investigate / stop; reason and review date:

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# Lost-deal evidence ledger

Keep customer statements, staff interpretations, and unknowns distinct.

## 1 / DEFINE THE REVIEW

Decision, time period, eligible opportunities, and exclusions:

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Approved tool/data handling and human reviewer:

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## 2 / GIVE EACH RECORD AN ADDRESS

Deal ID \_\_\_\_ Evidence ID \_\_\_\_ Source type \_\_\_\_ Date \_\_\_\_

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Outcome: won / lost / pending / unknown

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Exact excerpt and location of original record:

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## 3 / CHECK THE INTERPRETATION

Tentative theme supported by the excerpt:

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Contradictory evidence or alternative explanation:

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Unique deals with theme \_\_\_\_ reviewed deals \_\_\_\_

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## 4 / INVESTIGATE AND ACT

Question about actual behavior that could change our view:

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Proposed response, evidence needed, and owner:

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Time saved by AI minus preparation and verification time:

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Review result: unsupported claims, missed themes, next change:

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# Article-to-inquiry planning canvas

Connect a customer decision to useful content and an appropriate next step.

## 1 / CHOOSE THE READER AND DECISION

Reader situation and exact question:

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Evidence that this question matters:

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Query hypothesis; what current search results provide:

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## 2 / MAKE THE ARTICLE USEFUL

Answer the question in two direct sentences:

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Original example, comparison, or practical method:

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Resource the reader can use without buying:

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## 3 / MAKE THE NEXT STEP COHERENT

Related service and truthful scope connection:

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Primary CTA + verified destination:

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Existing articles to link from and to:

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## 4 / PUBLISH AND LEARN

Editorial reviewer, source checks, and publication date:

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Distribution excerpt and appropriate channel:

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Visits \_\_\_\_ resource uses \_\_\_\_ qualified inquiries \_\_\_\_

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Outcome review date and one question to investigate:

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