

Brand Audit Worksheet

The Brand Audit Worksheet

A 15-Minute Checkup for Professional Services Firms

Influential Digital | Dr. Dallas McMillan

Score your brand, find the weakest link, fix what actually moves the needle.

How to Use This Worksheet

What this is

This worksheet gives you a **7-point health check** on your professional brand.

You'll score yourself from **1–10** across seven areas that drive whether:

- The right clients can *find* you
- They *trust* you
- They're willing to pay **premium fees**

Your goal isn't a perfect score today. Your goal is **clarity** on what to fix first.

How to complete it (5–15 minutes)

1. **Print it** or open it on a tablet where you can write.
2. For each of the 7 areas:
 - Read the **1, 5, 10** descriptions.
 - Circle the number that best fits where you are today.
3. Add up your scores for a **total out of 70**.
4. Use the “**Your Priority for the Next 90 Days**” page to choose **one** focus.

| **Important:** Don't overthink it. Your first honest reaction is usually right.

Scoring scale (use this for each section)

Score	Meaning
1–3	Weak — this is hurting you right now
4–6	Okay — working, but leaving money on the table
7–8	Strong — this is a real asset
9–10	Outstanding — this is a competitive advantage

Area 1: Message Clarity

Question: Can a stranger understand what you do and why it matters to *them* in 10 seconds?

Score: 1–3 (Confusing / Generic)

- Your main headline is about **you**, not the client
- You describe services (“accounting / consulting / legal services”) rather than outcomes
- People often say: “So... *what do you actually do?*”

Score: 4–6 (Some Clarity, But Vague)

- You mention a target audience and problems, but it could fit many firms
- You have multiple different “elevator pitches” depending on the day
- Prospects sort-of get it, but still ask lots of basic questions

Score: 9–10 (Crystal Clear & Compelling)

- In one sentence, you can say: “We help **[WHO]** solve **[PROBLEM]** so they can **[OUTCOME]**”
 - People repeat your positioning back to you in their own words
 - Ideal clients say: “*That’s exactly what I need.*”
-

Your score for Message Clarity:

[1 2 3 4 5 6 7 8 9 10]

Circle one

Area 2: Website Effectiveness

Question: Does your website consistently turn visitors into enquiries or bookings?

Score: 1–3 (Digital Brochure)

- Looks “professional” but generic
- No clear niche, no clear next step
- Very few genuine leads come through the site

Score: 4–6 (Functional, But Underperforming)

- There is a clear call-to-action, but it’s easy to miss
- You get some enquiries, but mostly from price-sensitive prospects
- Analytics exist, but you rarely look at them

Score: 9–10 (Quiet Workhorse)

- Homepage message speaks directly to a specific audience + problem
 - Clear CTA above the fold (book a call / assessment / download)
 - You can point to **consistent, qualified leads** generated each month
-

Your score for Website Effectiveness:

[1 2 3 4 5 6 7 8 9 10]

Circle one

Area 3: LinkedIn Presence

Question: Does your LinkedIn profile and activity support your expert positioning?

Score: 1–3 (Online CV)

- Headline is your job title only
- About section is a wall of text about your history
- You rarely post or comment

Score: 4–6 (Present, But Passive)

- Headline mentions problems or outcomes, but still generic
- You’ve posted in the last month, but not consistently
- Profile has some recommendations, but few clear proof pieces

Score: 9–10 (Authority Profile)

- Headline clearly says who you help and what you help them achieve
 - About section tells a credible, client-focused story
 - You post **weekly**, adding insight (not just sharing links)
 - The right people connect and **mention your content** on calls
-

Your score for LinkedIn Presence:

[1 2 3 4 5 6 7 8 9 10]

Circle one

Area 4: Google Presence

Question: What happens when someone Googles your name or firm?

Score: 1–3 (Invisible or Messy)

- You don't appear on page 1 for your own name
- Outdated or unflattering listings show up
- Few or no Google reviews

Score: 4–6 (Basic Footprint)

- You have a Google Business Profile with some reviews
- Your website appears, but nothing else notable
- Results are accurate but not impressive

Score: 9–10 (Confidence-Building Footprint)

- Strong Google rating with multiple recent 5-star reviews
 - Search results include **articles, podcasts, or talks** you've done
 - A prospective client can feel confident reaching out just from Google
-

Your score for Google Presence:

[1 2 3 4 5 6 7 8 9 10]

Circle one

Area 5: Authority Content

Question: Do you have visible proof of your expertise online?

Score: 1–3 (Best-Kept Secret)

- Most of your knowledge lives in your head or in client work
- You haven't published anything in months (or years)
- Prospects have to take you at your word

Score: 4–6 (Patchy Presence)

- A few good articles, videos, or presentations exist
- Content is scattered and not clearly linked from your main profiles
- People occasionally say "I saw your article on X"

Score: 9–10 (Obvious Expert)

- You have **at least one flagship piece** (guide, webinar, or book) in your niche
 - Supporting content (posts, clips, emails) regularly reference your frameworks
 - Prospects arrive **pre-sold** because they've consumed your material
-

Your score for Authority Content:

[1 2 3 4 5 6 7 8 9 10]

Circle one

Area 6: Lead Capture & Nurture

Question: Do you have a reliable way to turn visitors and followers into warm leads?

Score: 1–3 (Leaky Bucket)

- No lead magnet, no email list, or list is completely dormant
- New people find you, then disappear without a trace
- You rely on ad-hoc referrals and chance

Score: 4–6 (Some Capture, Little Nurture)

- You have one opt-in (e.g. checklist or guide) but it's under-promoted
- New leads join the list but rarely hear from you
- There is no clear path from subscriber → booked call

Score: 9–10 (Simple, Effective Funnel)

- Clear lead magnet offered on your site & LinkedIn
 - New subscribers receive a **short, helpful email sequence**
 - Those who engage are invited to a **call or assessment** and many accept
-

Your score for Lead Capture & Nurture:

[1 2 3 4 5 6 7 8 9 10]

Circle one

Area 7: Response Speed & Call Handling

Question: How quickly and professionally do you respond to new enquiries?

Score: 1–3 (Slow & Inconsistent)

- Calls often go to voicemail or ring out
- Emails sit for days before anyone replies
- You regularly lose opportunities because people “went with someone else”

Score: 4–6 (Generally Okay)

- You get back to people within 24–48 hours most of the time
- Some enquiries slip through the cracks when things get busy
- There is no standard process for calls and follow-ups

Score: 9–10 (Always On, Always Helpful)

- Calls are answered **24/7** or immediately triaged
 - Every enquiry gets a prompt, professional response
 - Prospects often comment on how responsive and organised you are
-

Your score for Response Speed & Call Handling:

[1 2 3 4 5 6 7 8 9 10]

Circle one

Your Brand Score & What It Means

Write your scores here

Area	Score
1. Message Clarity	____/10
2. Website Effectiveness	____/10
3. LinkedIn Presence	____/10
4. Google Presence	____/10
5. Authority Content	____/10
6. Lead Capture & Nurture	____/10
7. Response Speed & Call Handling	____/10

Total Brand Score: ____/70

How to read your total

55–70: High Value Brand Emerging

You're in strong shape. Focus on tightening offers and scaling what works.

35–54: Solid Foundation, Big Upside

Plenty is working, but you're leaving money and opportunities on the table. Prioritise 1–2 weak areas.

0–34: Significant Gaps (Urgent)

You're almost certainly under-earning relative to your skill level. Good news: every improvement here has leverage.

Your Priority for the Next 90 Days

Step 1 – Circle your lowest-scoring area

Message | Website | LinkedIn | Google | Authority | Lead Capture | Response |

That's your leverage point.

| Your lowest score is your biggest opportunity. Fix that one thing first.

Step 2 – Define one 90-day outcome

In 90 days, I want this area to be at least a: ___/10

What would be true if that were the case?

1. _____
 2. _____
 3. _____
-

Step 3 – First 3 actions

This week I will:

1. _____
 2. _____
 3. _____
-

Next Steps

You've done the hard part: getting clear.

Now you have two options:

Option 1: DIY

Use this worksheet + the *Ultimate Guide to Building a Professional Services Brand in 2025* to plan your own next 90 days.

Option 2: Get Help

Book a free **AI Impact & Brand Assessment** and we'll walk through your scores with you and map out the fastest way to:

- Fix your weakest area
 - Use AI to remove bottlenecks
 - Build a simple, sustainable authority engine
-

Book your free assessment:

 calendly.com/dallaslm/15min

Prefer to talk first?

Call our AI assistant AIVA on **+61 468 080 000** and say “*I'd like a Brand Audit review.*”

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Design Notes for PDF Production

General Style

- **Format:** A4 portrait, generous white space
- **Font:** Clean sans-serif (Inter, Source Sans Pro, or similar)
- **Colors:** Influential Digital brand colors with single accent
- **Icons:** Simple line icons for each of the 7 areas

Page Layout Suggestions

Cover Page

- Bold title centered
- Subtle gradient or soft background
- “Influential Digital” logo bottom right
- Tagline beneath title

Instructions Page

- Two-column layout
- Left: “How to use”
- Right: “Scoring scale” in a highlighted box

Each Area Page (7 pages)

- **Top:** Area title + relevant icon
- **Middle:** Three stacked boxes for 1-3, 4-6, 9-10 descriptions
- **Bottom:** Large horizontal 1-10 scale with circles to mark

Score Summary Page

- Clean table for 7 scores + total
- Visual indicator box showing three tiers
- Use color coding (red/amber/green) for quick scan

Priority Page

- “My #1 Focus” highlighted prominently
- Clean lined areas for goals and actions
- Visual hierarchy emphasizing Step 1

Back Page (CTA)

- Two clear options (DIY vs Get Help)
- Button-style graphic for booking link
- AIVA phone number prominent
- QR code to Calendly (optional)

Print Specifications

- Export as PDF with crop marks if printing
- Ensure 300dpi for any images
- Test readability when printed B&W