



A 20-minute checkup for any business that runs on customers, clients, patients or donors

Answer honestly. There are no wrong answers, only ones you'd like to change. When you're done, circle the three answers you like least. Those are where to start.

FOUND – can people find you, and is what they find right?

#	QUESTION	YOUR ANSWER	WHY IT MATTERS
1	Where does your business have a profile? Google, Facebook, Instagram, LinkedIn, Yelp, Nextdoor, Houzz, Zillow, others?		People look in more than one place. After reading good reviews, 54% go to the business's website and 24% to its social media. (BrightLocal, 2026)
2	When was each one last updated?		A profile with no post since 2022 makes a stranger wonder whether you're still in business. Scroll your own page and see what they see.
3	Are your name, address, phone and hours the same on every profile and on your website?	☐ Yes ☐ No ☐ Not sure	62% would avoid a business if they found incorrect information online. (BrightLocal, 2023) Local search experts rank "the name, address and phone on your website match your Google profile" #15 of 187 factors for showing up on the map. (Whitespark, 2026)
4	Ask ChatGPT: "Who's a good [what you do] in [your town]?" Are you named? Is the information right?	☐ Named ☐ Not named	45% now use AI tools to find local businesses, up from 6% a year earlier, and 88% double-check what it tells them. (BrightLocal, 2026)
5	Do you take photos of your work and post them?	☐ Yes ☐ No	Google tells businesses to add at least three photos that show the services they offer, because photos help customers quickly understand the work. (Google Business Profile Help)
6	Do your business cards, website and profiles share the same logo, colors and contact details?	☐ Yes ☐ No	When the card in someone's hand doesn't match the website they look up, they wonder whether they found the right business.
7	Does your email have a signature with your name, business, phone and website? Does your email address use your business name?	☐ Signature ☐ Business address	In a 2026 survey, 40% said full contact details make a business email more trustworthy, 35% said a company address does, and 23% said a branded signature does. (Exclaimer/OnePoll, 2026)

CHOSEN – when they compare you to the competition, do you win?

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8	How many reviews do you have on each profile?		97% read reviews for local businesses, and 47% won't use one with fewer than 20. (BrightLocal, 2026) A referral doesn't get you out of this: 96% would research a financial advisor online even after a referral (Wealthtender, 2025), and 61% of patients say a personal recommendation won't sway them if the reviews are bad (rater8, 2025).
9	How many of those reviews have a reply from you?		89% expect the owner to respond, and 42% are unlikely to use a business that ignores its reviews. (BrightLocal, 2026)

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10	How many came from people who actually hired you, rather than friends, family or fellow members helping out?		Google's policy doesn't allow reviews based on a conflict of interest, including family relationships (Google). Since October 2024, the FTC has banned fake reviews and insider reviews that don't disclose the connection (FTC). Reviews that get removed take your count down with them.
11	Does your website have a form that asks what they need, how they heard about you, and the best way to reach them?	☐ Yes ☐ Partly ☐ No form	"How did you hear about us?" is how you find out what's working. Only 18% of small businesses feel very confident their marketing works, and their top frustration is not knowing what's working. (Constant Contact, 2025) Tracking software misses a lot: in a 2024 study of 8,528 answers, 18% of customers credited word of mouth, which software can't see at all. (HockeyStack, 2024)
12	When did you last check how fast you answer that form?		In a 2026 study of 11.6 million interactions, a one-hour delay in replying cut the odds of being hired by 46% , and a full-day delay by about 90% . (Management Science, 2026) An earlier <i>Harvard Business Review</i> study found the same pattern: within an hour, nearly 7x as likely. (HBR, 2011)
13	When you miss a call, what does the caller get? A current voicemail greeting? A text back? A call back within the hour?		21% immediately call another business, and 82% say they'd call a competitor if you don't answer. (CallRail, 2025)

REMEMBERED – do they come back, and do they send people?

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14	Do you ask every customer for a review when the work is done?	☐ Always ☐ Sometimes ☐ Never	Most people who are asked do it: 65% wrote one after being asked. (BrightLocal, 2026)
15	Do you ask for a referral?	☐ Always ☐ Sometimes ☐ Never	73% of homeowners would refer a company after excellent service (Housecall Pro, 2025), and 66% of home sellers chose an agent who was referred to them or one they'd used before (NAR, 2025).
16	After the work is done, do you follow up with a thank-you note, a useful tip, a maintenance reminder or a holiday card?	☐ Yes ☐ No	What customers say they value most after the job: a useful tip (70%), a small free perk (69%), maintenance reminders (43%), and a personalized thank-you note (30%). (Housecall Pro, 2025) In a field experiment, a handwritten thank-you note raised spending by loyal customers. (Journal of Interactive Marketing, 2022)
17	When did your past customers last hear from you when you weren't asking for something?		NAR found that 91% of buyers would use or recommend their agent again. It also found that only 18% of repeat buyers went back to their previous agent. (NAR, 2025) Only 18.9% of first-time donors give a second time (Fundraising Effectiveness Project, 2025). Repeat customers make up 39% of residential contractors' annual revenue (ServiceTitan, 2023), and keeping a customer costs 5 to 25 times less than finding a new one (HBR, 2014).

Circled three answers you don't like? That's exactly what a 15-minute call is for. No pitch, just what I'd fix first.

Know a business owner who'd circle more than three? Hand them a copy of this scorecard.

Betsy Walker · Taming Your Tech ·

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