FOUR-STAGE DIAGNOSTIC WORKBOOK

Website Growth Diagnosis Complete Report Sample

From business questions to an evidence-based action plan.

A branded template bundle for documenting discovery, review, research, and next steps.

01 BUSINESS INTERVIEW

Business context & research questions

02 WEBSITE REVIEW

Initial website findings

03 MARKET & COMPETITOR RESEARCH

04 DIAGNOSIS & ACTION PLAN

HOW TO USE THIS SAMPLE

Use the PDF bookmarks to jump to any of the four stages. Each stage has its own page sequence and working tables.

The prompts are placeholders. Replace them with project facts, evidence, sources, decisions, and agreed actions.

SAMPLE BOUNDARIES

This document is a four-stage template bundle. It contains prompts and fill-in fields, not real client data or completed diagnostic findings. Actual conclusions must be based on project materials, verifiable evidence, and the scope agreed by both parties.

STAGE 01 / BUSINESS INTERVIEW

Business Context & Research Questions

Clarify products, customers, and current acquisition before defining the scope for website review and market research.

Client / company name [Enter company name]	**Website URL** [Enter website URL]
Interview date / format [Date and meeting format]	**Participants** [Names and roles]

01 One-sentence business overview

Complete the sentence: We provide [core product / service] for [target customers], solving [customer need]. Our priority markets are [markets], and our main acquisition channels today are [channels].

02 Business profile

Core products / services [Product categories, key models, or service scope]	**Priority target markets** [Countries / regions and priority]
Product strengths / evidence [Differentiators and materials that can verify them]	**Target customers / buying roles** [Industry, company type, or job role]
Applications / customer needs [Typical use cases and main challenges]	**Key buying criteria** [Quality, certification, delivery, service, etc.]

03 Business goals & success criteria

Business outcome to improve [Goal and priority]	**Expected change** [What should improve?]
Metric / current baseline [Metric, current value, or “to be confirmed”]	**Measurement period / target date** [Period or date]

If information is unavailable, mark it “to be confirmed” and note its source.

STAGE 01 / BUSINESS BASELINE

Acquisition & Website Baseline

Record current channels, the website's role, and available data to establish a practical baseline for later review.

04 Current acquisition channels

Channel	Current role	Effective leads / main issues
Trade shows / offline	[Primary / supporting / not used]	[Observed results or issues]
Existing customers / referrals	[Primary / supporting / not used]	[Observed results or issues]
B2B marketplaces	[Primary / supporting / not used]	[Observed results or issues]
Search / SEO	[Primary / supporting / not used]	[Observed results or issues]
Social media	[Primary / supporting / not used]	[Observed results or issues]
Advertising / other	[Primary / supporting / not used]	[Observed results or issues]

05 Website role & basic setup

Website responsibilities

[ ] Brand awareness [ ] Product information [ ] Generate inquiries [ ] Customer support [ ] Other: _____

Platform & languages

CMS / platform: [Enter]
Website languages: [Enter]

06 Available business data

Metric	Current status	Period / source
Monthly website visits	[Value or to be confirmed]	[Period / source]
Monthly inquiries	[Value or to be confirmed]	[Period / source]
Qualified inquiries / sales	[Value or to be confirmed]	[Period / source]
Main inquiry markets / sources	[Value or to be confirmed]	[Period / source]

07 Team resources & project constraints

Available people and materials

[Owners, product materials, case studies, etc.]

Timing, technical access, or boundaries

[Timeline, permissions, dependencies, or limits]

> Keep unverified data marked "to be confirmed / to be validated." Do not present estimates as measured performance.

STAGE 01 / INTERVIEW SYNTHESIS

Research Questions & Follow-up

Turn interview notes into trackable questions and decide what the next website and market reviews need to verify.

08 Confirmed business facts

Status	Confirmed fact
Client confirmed	01 [Enter one confirmed business fact]
Client confirmed	02 [Enter one confirmed business fact]
Client confirmed	03 [Enter one confirmed business fact]

09 Research question register

Priority	Question to research	Why it matters	How to verify
[P1 / P2]	[Question to research]	[Business impact]	[Data / page / interview]
[P1 / P2]	[Question to research]	[Business impact]	[Data / page / interview]
[P1 / P2]	[Question to research]	[Business impact]	[Data / page / interview]
[P1 / P2]	[Question to research]	[Business impact]	[Data / page / interview]

10 Research scope & assumptions

Included in this review	Excluded / to be agreed separately
[Priority business, website, product, or market scope]	[Scope limits, permissions needed, or current assumptions]

Client review	Reviewer	Date
[Reviewed / additions needed]	[Name]	[Date]

Next deliverables: 02 Website Review → 03 Market & Competitor Research → 04 Diagnosis & Action Plan. Information status: client confirmed / client provided / preliminary assessment / to be validated. Unverified items remain questions, not conclusions.

STAGE 02 / WEBSITE REVIEW

Initial Website Review

Record accessibility, page structure, and inquiry-path checks. Attach a page, date, and evidence to each finding; mark unverified items clearly.

Client / company name [Enter company name]	**Website URL** [Enter website URL]
Review date / reviewer [Date and name]	**Review scope** [URLs / number of pages]

01 Initial status

Technical accessibility [OK / review needed] Evidence / note: [Enter]	**Page messaging** [Clear / needs improvement] Evidence / note: [Enter]	**Inquiry path** [Works / has friction] Evidence / note: [Enter]

02 Technical & indexing checks

Check	Status	Page / evidence	Notes
Homepage access & HTTPS	[Status]	[URL / response / date]	[Enter / verify]
robots.txt & sitemap	[Status]	[File URL / result]	[Enter / verify]
Crawlability of key pages	[Status]	[Page / method]	[Enter / verify]
Mobile layout & speed	[Status]	[Device / tool / date]	[Enter / verify]
Redirects, 404s, canonical URLs	[Status]	[Page / response]	[Enter / verify]
Language versions & hreflang	[Status / N/A]	[Page / result]	[Enter / verify]

03 Review standard

> Record only facts observable within the agreed scope. Verify automated-tool alerts manually. Without access to analytics, Search Console, or the site backend, do not infer actual traffic, conversions, or indexing performance.

STAGE 02 / PAGE-BY-PAGE NOTES

Page Messaging, Inquiry Paths & Issues

Review how buyers learn about products, build trust, and contact the team. Add or remove page types to match the actual site.

04 Priority page review

Page type	Can buyers understand it?	Trust information / evidence	Conversion path	Notes
Homepage	[Positioning / value]	[Benefits / evidence / cases]	[Next step]	[Enter]
Product / service page	[Audience / use]	[Specs / applications / certifications]	[Contact / request quote]	[Enter]
Industry / application page	[Target industry]	[Applications / outcome evidence]	[Related product path]	[Enter]
About / trust page	[Company / team]	[Credentials / factory / clients]	[Contact information]	[Enter]
Contact / form page	[Information visible?]	[Fields / guidance]	[Submit / confirmation]	[Enter]

05 Issue register

Priority	Page / location	Observed issue	Evidence / impact	Next verification
[P1 / P2 / P3]	[Page / URL]	[Observed behavior]	[Evidence / potential impact]	[How to verify]
[Priority]	[Page / URL]	[Enter]	[Enter]	[Enter]
[Priority]	[Page / URL]	[Enter]	[Enter]	[Enter]
[Priority]	[Page / URL]	[Enter]	[Enter]	[Enter]

Scope note: This is an initial manual review within the agreed scope, not a complete security audit, backend-data analysis, or performance test. Keep a verifiable URL or screenshot for every issue.

STAGE 03 / MARKET & COMPETITOR RESEARCH

Key Evidence & Preliminary Assessment

Start with buyer searches, competitor presentation, and business context. Record the source and evidence before writing an interpretation or an assumption to validate.

Client / company name [Enter company name]	**Product / business scope** [Enter product or scope]
Target market / language [Enter market and language]	**Research date / owner** [Date and researcher]

01 Research question & scope

Question to answer [Decision or uncertainty this research should address]	**Included / excluded scope** [Countries, products, keywords, and competitors]

02 Source log

Source type	Search conditions / subject	Source URL	Date	Notes / limits
Search results	[Query / country / language]	[Search engine / URL]	[Date]	[Capture / notes]
Competitor site	[Company / page]	[Public page URL]	[Date]	[What to observe]
Industry material	[Report / public data]	[Source URL]	[Date]	[Methodology]
Client materials	[Interview / inquiries / sales]	[Material name]	[Date]	[Permission / redaction]

03 Buyer & decision context

Dimension	Preliminary notes	Evidence / business input	Status
Target role	[Buyer / engineer / manager]	[Industry / company type]	[To validate]
Trigger	[Why buyers start searching]	[Need / constraint]	[To validate]
Decision criteria	[Performance / certification / service]	[Trust evidence needed]	[To validate]

STAGE 03 / EVIDENCE SYNTHESIS

Competitors, Search Themes & Findings

Compare publicly available evidence only. Interpret search opportunities in light of the target market and business fit, not as a guarantee of demand or results.

04 Competitor positioning & page evidence

Peer	Competitor source	Positioning & buyers	Content / evidence	Observation
A	[Company / URL]	[Product focus / audience]	[Page / trust evidence]	[Gap / distinction]
B	[Company / URL]	[Product focus / audience]	[Page / trust evidence]	[Gap / distinction]
C	[Company / URL]	[Product focus / audience]	[Page / trust evidence]	[Gap / distinction]

05 Search themes & buyer intent

Theme / query	Buyer intent	Market / language	Search evidence	Business fit
[Keyword theme]	[Informational / commercial / transactional]	[Region / language]	[SERP / peer page]	[Relevance]
[Keyword theme]	[Intent]	[Region / language]	[Evidence]	[Assessment]
[Keyword theme]	[Intent]	[Region / language]	[Evidence]	[Assessment]
[Keyword theme]	[Intent]	[Region / language]	[Evidence]	[Assessment]

06 From evidence to preliminary assessment

ID	Evidence source	Verifiable fact	Interpretation / assumption	Confidence
E01	[Source / date]	[Fact that can be checked]	[Business interpretation / assumption]	[High / med. / low]
E02	[Source / date]	[Fact that can be checked]	[Business interpretation / assumption]	[High / med. / low]
E03	[Source / date]	[Fact that can be checked]	[Business interpretation / assumption]	[High / med. / low]

Search results change by location, language, device, and time. Record the research date and sources. Validate search demand, commercial value, and sales outcomes against business data.

STAGE 04 / ALIGNED DIRECTION

Diagnosis Findings & Action Plan

Translate business goals, website checks, and market research into priorities for discussion. Review conclusions together; this template does not assume a predetermined result.

Client / company name [Enter company name]	**Diagnosis scope** [Markets / pages / products]
Alignment date / participants [Date and participants]	**Version / status** [Draft / confirmed]

01 Executive summary

Decision to make [In 1–2 sentences, describe the growth or website question the team most needs to resolve.]
Diagnosis assessment [Conclusion, supporting evidence, and what remains unconfirmed.]

02 Priority preview

#	Priority	Why now / supporting evidence	Owner / expected outcome
01	[Priority title]	[Why it matters now / evidence]	[Owner / expected outcome]
02	[Priority title]	[Supporting rationale]	[Owner / expected outcome]
03	[Priority title]	[Supporting rationale]	[Owner / expected outcome]

03 Conclusion boundaries & assumptions to validate

This assessment is based on the confirmed scope, available materials, and public information. List unavailable backend data, insufficient samples, and unverified assumptions as items to validate. Do not present correlation as causation.

STAGE 04 / IMPLEMENTATION RHYTHM

Priorities, Roadmap & Decisions

Discuss priority using business impact, evidence strength, effort, and dependencies. Confirm timelines, owners, and acceptance criteria together.

04 Action-priority matrix

Level	Issue / opportunity	Evidence / page	Impact	Effort	Recommended action
P1	[Issue / opportunity]	[Evidence / URL]	[H / M / L]	[H / M / L]	[Action]
P2	[Issue / opportunity]	[Evidence / URL]	[Enter]	[Enter]	[Action]
P2	[Issue / opportunity]	[Evidence / URL]	[Enter]	[Enter]	[Action]
P3	[Issue / opportunity]	[Evidence / URL]	[Enter]	[Enter]	[Action]

05 Roadmap & completion signals

Timing	Key action	Resources / dependencies	Deliverable / acceptance signal
Near term	[Fix a baseline issue / run a quick validation]	[Owner / dependency]	[Deliverable / signal]
Next	[Improve pages / content]	[Owner / dependency]	[Deliverable / signal]
Ongoing	[Monitor data / operations]	[Review cadence]	[Trigger for adjustment]

06 Open items & decision log

Item	Record / next step	Owner	Status / date
[Assumption / question]	[Information or confirmation needed]	[Owner]	[Date / status]
[Decision]	[Agreement / trade-off]	[Approver]	[Date]

Measurement: Establish a baseline and shared definitions before setting a review cadence. Do not promise search rankings or inquiry volume. Track page completion, content coverage, technical fixes, qualified visits, and inquiry quality where data is available.