

BEYOND the TABLE DIGITAL

Digital Clarity Guided Audit

Companion Workbook

A guided workbook to help you prepare, reflect, and act with more clarity.

Use this as a spacious working companion to the audit itself. It is designed to help you gather context before you begin, capture what stands out as you move through the conversation, and hold onto the most useful conclusions afterward.

Get clear first. Then make better decisions from that clarity.

Welcome

This workbook supports the Digital Clarity Guided Audit. It is not here to replace the guided conversation. It is here to help you slow down enough to see what is actually true about your business, your digital presence, and the path people are being asked to follow.

Use these pages to prepare before you begin, capture what stands out while you work through the audit, and preserve the most useful conclusions once the conversation is complete.

The goal is simple.

Get clear first. Make better decisions next. Build a stronger path to revenue with more confidence and less waste.

What do I most want this audit to help me see more clearly?

What would a genuinely useful outcome from this audit look like for me?

Before You Begin

For best results, gather a few things before you start. You do not need everything to be polished. You simply want enough material on hand to answer honestly and specifically.

- ☐ Your website link
- ☐ Your core offer or offers
- ☐ Any lead magnets or downloads
- ☐ A sense of what feels unclear right now
- ☐ A short description of the business
- ☐ Current service, product, or booking pages
- ☐ Any email welcome or follow-up sequence
- ☐ A few notes on what feels underperforming

What feels most frustrating or uncertain in the digital side of the business right now?

What part of the business do I suspect is stronger than the way it is currently being presented?

Business Snapshot

Start with a simple record of the business as it stands today. Keep it plain and useful.

Business Name

Website

What does the business do?

What do I currently sell or offer?

Who do I most want to serve?

What do I most want to improve right now?

Clarity

Use this section to notice whether the business itself is clear before you worry about tactics.

What is the main offer?

Is there one clear offer, or several competing for attention?

What problem does the offer solve?

Why do people choose this business?

What should a new visitor understand quickly?

Notes from this section

Messaging

Capture what becomes visible about the language, positioning, and tone of the business.

How do I currently describe the business?

What headline, statement, or positioning am I leading with now?

Do people understand what I do quickly?

Where does confusion seem to show up?

Does the tone fit the quality, style, and price point of the offer?

What words or phrases feel too vague, generic, or overused?

Digital Assets

Take stock of what already exists before deciding what needs to be rebuilt, replaced, or added.

- | | |
|--|---|
| ☐ Home page | ☐ About page |
| ☐ Work With Us or services page | ☐ Start Here page |
| ☐ Product page | ☐ Sales page |
| ☐ Inquiry form | ☐ Booking page |
| ☐ Lead magnet | ☐ Guide or workbook download |
| ☐ Email welcome sequence | ☐ Follow-up email sequence |
| ☐ FAQ | ☐ Blog or article content |

Which asset is carrying the most weight right now?

Which asset feels weakest?

What seems to be missing?

Is the website trying to do too many jobs at once?

Sales Path

Use this section to follow the path from attention to action as honestly as you can.

How do people usually find the business?

Where do they usually land first?

What do they see first?

What are they being asked to do next?

Is there one clear next step, or several competing ones?

Where do people seem to hesitate or drop off?

Follow-Up

This section helps you see what happens after interest first appears.

What happens after someone inquires, clicks, downloads, or shows interest?

Do I have any email follow-up in place?

Do I follow up manually, systematically, or not at all?

What happens to people who are interested but not ready yet?

Where is follow-up currently weak or missing?

Growth Readiness

Do not assume more attention is the answer. Use this page to assess whether more growth effort would help or simply expose confusion.

How am I currently trying to grow?

If attention doubled next month, what would break first?

What feels weakest in the system right now?

Am I ready for more growth, or would that magnify confusion?

Notes from this section

What the Audit Helped Me See

Use this page after the conversation to capture the most important realizations while they are still fresh.

What feels most clear now?

What feels more unclear than I realized?

What appears to be missing?

What seems to be the biggest source of friction?

What surprised me most?

Action Plan

The aim is not to do everything at once. It is to move in a better sequence.

Use the same sequence the audit protects.

Fix first. Build next. Improve after that. Hold the rest until the foundation is stronger.

Fix first

Build next

Improve after that

Hold for later

30-Day Focus

Recommended Next Step

Consultant Prep

If you want the audit translated into a consultant-ready handoff brief, use this page to prepare the practical details that matter most.

What result do I want a consultant's work to improve first?

Do I need strategy, implementation, or both?

What likely needs to stay out of scope for now?

What constraints should be considered?

Use this only if needed.

The standard outcome of the audit is your summary and action plan. The consultant handoff brief is optional and is best used when you want help translating the diagnosis into a proposal or scope of work.

Closing Note

Clarity is not a small thing. It changes what you say, what you build, what you fix, and what you stop forcing.

Use what this audit revealed to move in a better sequence. You do not need to do everything at once. You need to do the right things in the right order.

A final reminder

Do not pour traffic into confusion.

What am I leaving this process knowing that I did not understand clearly before?
