Digital Marketing Client Meeting Exclusive Template

▼ **Meeting Template for YouTube SEO**

0. Quick Intro (10–20 seconds)

What to include:

- Who you are

- Why are you making this audit

- What you'll cover

- What results can they expect

Perfect Script Example:

"Hi, I'm [Your Name], and in this quick YouTube Channel Audit I'm going to show you exactly how we can improve your channel's content strategy, thumbnails, titles, and overall viewer retention. By the end of this video, you'll know the key changes that can help you grow faster and reach a much wider audience."

1. Channel Positioning & Niche Clarity

Explain clearly:

- What niche the channel is in

- Whether the messaging is consistent

- If the channel has a clear target audience

- Whether the value proposition is obvious within 5 seconds

What to say in the video:

- "Your niche is X, but your content covers Y & Z, which may confuse YouTube's algorithm."

- "Here's how you can define a sharper value proposition."

2. Content Strategy Analysis

This is the biggest factor hiring managers look for.

Analyze:

- Which videos are performing best (views & velocity)

- What topics attract the highest CTR & watch time

- Which formats are working (long-form, shorts, series)

- Upload consistency

What to say:

- "These top 3 videos indicate your audience is strongly interested in _____."

- "You should double down on high-performing topics."

3. SEO & Metadata Optimization

Look at:

- Titles

- Thumbnails

- Descriptions

- Tags

- Search ranking opportunities

Show examples of improvement:

- Rewrite 2–3 titles to show your strategy

- Suggest thumbnail variations

- Show how to target better keywords or interests

4. Audience Retention Breakdown

If you can see analytics (or assume based on typical channels):

Focus on:

- Hook quality (first 30–60 seconds)

- Drop-off points

- Video pacing

- Delivery style

- Editing quality

What to say:

- "Your intro is too long; viewers might drop off before the main value appears."

- "Retention curves usually dip here, so here's how to fix it."

5. Thumbnail & Title Strategy

This is CRITICAL for YouTube growth.

Show:

- Bad vs good thumbnails

- Why their thumbnails may not be clickable

- How better contrast/emotion can improve CTR

- Title formulas (curiosity + value + emotion)

What to say:

- "If we redesign this thumbnail with clearer visual hierarchy, CTR could increase from 3% to 6%."

6. Algorithm Signals & Viewer Satisfaction

Explain how the channel can improve:

- AVD (Average View Duration)

- CTR (Click-through Rate)

- Session time

- Return viewers

- Suggested video dominance

This shows that you understand YouTube deeply.

7. Competitor Analysis

Pick 2–3 channels in the same niche and compare:

- Content types

- Publishing frequency

- Thumbnails/titles

- Views per video

- Growth trends

Why this impresses clients:

They immediately see that you think strategically.

8. Monetization Opportunities

Depending on the channel's size, mention:

- Sponsorship potential

- Affiliate opportunities

- Channel memberships

- Product ideas

Even if they didn't ask, adding this shows business-thinking.

9. Clear Action Plan (This is VERY Important)

End the audit with a clean, simple plan:

Next 30 Days:

- Fix thumbnails
- Align titles with search intent
- Create 3 new content series
- Publish consistently

Next 60–90 Days:

- Introduce storytelling
- Improve retention
- Add new formats
- Expand into Shorts

Keep it simple but powerful.

10. Show How You Can Help

At the end of your meeting, say:

"If you want, I can help optimize your titles & thumbnails weekly, create content strategies, and manage your upload calendar."

This is what gets you hired.

▼ **Meeting Template For Website SEO**

0. Quick Intro (10–20 seconds)

- Who you are
- What this video will cover
- What results can they expect

Example:

"Hi, I'm [Your Name], and in this short audit, I'll walk you through how we can improve your website's clarity, user experience, SEO, and conversion performance."\

1. Homepage Review – First Impression Test

This is the most important part of the website audit.

Focus on these questions:

- What do you do?
- Who is it for?
- Why should anyone care?
- What's your main call to action (CTA)?
- Is the hero section clear or confusing?

Show on-screen:

- Clarity issues
- Weak CTAs
- Layout improvements
- Above-the-fold messaging fixes

What decision-makers love:

When you tell them how to fix messaging in the first 5 seconds.

2. User Experience (UX) & Navigation Audit

Review:

- Menu structure
- Layout consistency
- Visual hierarchy
- Button visibility
- Spacing & readability
- Color contrast

What to highlight:

- Where people may get confused
- Where navigation causes friction
- How to simplify the journey

- How to reduce overwhelm

- How to improve mobile responsiveness

3. Visual Design & Branding Audit

Talk about:

- Brand colors

- Font choices

- Image quality

- Use of whitespace

- Consistency across pages

- Emotional triggers (trust, authority, friendliness)

Clients love seeing:

- Examples of better designs

- Side-by-side comparisons

- Simple tweaks that increase trust

4. On-Page SEO & Content Optimization

Analyze:

- Headings (H1, H2, H3 structure)

- Keyword usage

- URL structure

- Meta description opportunities

- Duplicate content

- Thin content sections

- Internal linking

- Alt text on images

Show specific fixes:

- "This page is missing a keyword-rich H1."

- "You can rewrite this section to improve ranking"

- "Add internal links here and here."

5. Site Speed & Performance Review

Use tools like:

- PageSpeed Insights

- GTmetrix

- Web.dev

Discuss:

- Loading speed

- Image compression

- JavaScript/CSS optimization

- Unused plugins (if WordPress)

Explain why speed matters for:

- SEO

- Mobile users

- User retention

- Conversion rates

6. Mobile Responsiveness Review

Most traffic is mobile — so this part is critical.

Check:

- Layout issues

- Overlapping elements

- Readability

- Tap targets

- Scrolling problems

- Font sizes

- Loading delays

Clients LOVE when you show:

"Here is how your site looks on mobile — see this problem?"

7. Conversion Rate Optimization (CRO)

Show them how they are losing money.

Focus on:

- CTAs (weak, hidden, confusing?)
- Lead generation opportunities
- Forms (too long? too complicated?)
- Trust elements (testimonials, social proof, guarantees)
- Above-the-fold clarity
- Product/service explanation

What impresses clients most:

When you pinpoint EXACT spots where conversions drop.

8. Content Quality Review

Focus on:

- Storytelling style
- Clarity vs fluff
- User intent matching
- Benefit-driven vs feature-driven copy
- Making the brand sound more authoritative or friendlier

9. Analytics & Tracking Setup (if accessible)

If you don't have access, say:

"If I had access, I would check..."

Then mention:

- Google Analytics setup

- Conversion tracking

- Event tracking

- Heatmaps (Hotjar, Clarity)

- Goal funnels

- User journeys

10. Competitor Comparison (Short & Sharp)

Pick 1–2 competitors:

Compare:

- Design

- Offer clarity

- SEO strength

- CTA placement

- Speed

- Messaging style

Clients love realizing where they're behind — and how you can help them catch up.

11. Final Action Plan (Most Important Section)

Break it into:

Immediate Fixes (0–14 days)

- Fix homepage message

- Improve CTAs

- Update menu navigation

- Basic SEO improvements

- Compress large images

Mid-Term Improvements (15–45 days)

- Add evergreen blog posts

- Improve page layouts

- Add testimonials & social proof

- Create lead magnet or email capture

- Redesign hero sections

Long-Term Strategy (45–90 days)

- Full SEO content plan

- Conversion optimization testing

- Blog growth strategy

- A/B testing CTAs

- Product/service funnel optimization

This structure makes you look strategic and long-term.

12. Closing Pitch (Soft + Professional)

End your Loom video with something like:

> "If you'd like, I can help execute all these improvements — including SEO fixes, design updates, and a full conversion optimization plan. Let me know and I'll prepare a custom proposal."

▼ **Meeting Template For Local SEO**

0. Quick Intro (10–15 seconds)

- Who you are

- Why are you doing this audit

- What areas will you cover

- What results can they expect

Example Script:
"Hi, I'm [Your Name]. In this short audit, I'll walk you through how we can

improve your Google Business Profile to increase visibility, attract more local customers, and rank higher in Google searches."

1. NAP + Profile Completeness Check

(NAP = Name, Address, Phone Number)

Audit:

- Business name accuracy

- Address formatting

- Phone number format

- Website link

- Hours & holiday hours

- Category selection

- Business description completeness

- Appointment URL (if applicable)

What to highlight:

- Missing fields

- Inconsistent NAP

- Incorrect primary category

- Missing secondary categories

Big tip:
A 100% filled profile ranks *significantly* higher.

2. Visual Assets Audit (Photos & Videos)

Review:

- Cover photo

- Logo

- Business photos

- Team photos

- Products/services photos

- Interior & exterior photos

- Quality & freshness of images

- Geotagging potential

Show:

- Competitors with better visuals

- Missing photo types

- Opportunities for better branding

Images are one of the *top 3* ranking signals for GMB.

3. Google Reviews Analysis

Audit:

- Total number of reviews

- Frequency of new reviews

- Star rating

- Recency of reviews

- Responses (are they replying?)

- Negative review handling

- Review keywords (SEO signals)

Talk about:

- Importance of continuous review generation

- Strategy for obtaining keyword-rich reviews

- Why review responses boost ranking

- How negative reviews can be turned positive

4. Category & Keyword Optimisation

Check:

- Primary category accuracy

- Missing secondary categories

- Review keywords (customers mentioning important terms)

- Competitor category choices

- Missing service keywords

- Missing product keywords

Show them:

- Where they are losing ranking opportunities

- What category changes could instantly boost their visibility

5. Products & Services Optimisation

Review:

- Are services added?

- Are products added?

- Are service descriptions optimised?

- Are prices listed?

- Are CTAs added (Call / Quote / Order)?

Opportunity:
Products & services dramatically increase conversions.

6. GMB Description Audit

Evaluate:

- Does the description explain the business clearly?

- Does it include local keywords (city, area)?

- Is it customer-focused?

- Is it updated?

Example phrases to mention:

- "Your description is missing local-intent keywords like [city], [service], and [area]. Adding them will help Google understand your business."

7. GMB Post Strategy Review

Audit:

- Posting frequency

- Post formats (image, offer, update, event)

- Website links

- CTA buttons

- Seasonal posts

- Engagement

What to recommend:

- Weekly GMB posts

- Seasonal posts

- Promotions

- Updates with keywords

- Local photo posts

- Behind-the-scenes content

GMB posts are ignored by most businesses — this is a HUGE optimisation advantage.

8. Local SEO Performance (If accessible)

If you have access to "Performance" inside GBP:

Check:

- Search views

- Map views

- Calls

- Directions

- Website clicks

- Search queries

- Customer action trends

If you *don't have access*, say:
"With account access, I would check search queries, direction requests, and how your profile is performing compared to local competitors."

9. Competitor Comparison (Very Persuasive Section)

Pick 2–3 nearby competitors and compare:

- Review count
- Review freshness
- Photos
- Categories
- GMB posts
- Completion score
- Local ranking positions
- Services listed

This section shows EXACTLY how they are losing customers.

10. Conversion Optimisation (How to Get More Leads)

Discuss:

- CTA buttons
- Phone number clickability
- Appointment link
- "Request a Quote" button
- Lead magnets (if applicable)
- Messenger setup
- Website landing page match

Goal: Increase calls, messages, and traffic.

11. Action Plan (0–90 Days)

Break down your recommendations into clear timelines.

🔷 Immediate Fixes (0–7 Days)

- Fix categories
- Update hours
- Add missing photos
- Add services
- Improve business description
- Respond to all reviews

🔷 Short-Term (7–30 Days)

- Upload weekly GMB posts
- Add product catalog
- Request 10–20 new reviews
- Add Q&A questions
- Improve top 10 photos

🔷 Long-Term (30–90 Days)

- Monthly competitor checks
- Regular review campaigns
- Seasonal GMB posts
- Optimization of call-to-action tracking
- Local backlink building
- NAP consistency across all directories

12. Closing Pitch (20 seconds)

Keep it soft and value-focused:

Example:

"If you'd like, I can take care of your entire Google Business Profile optimisation — including ranking improvements, review management, photo optimisation, and weekly posting. Let me know and I can share a custom plan for your business."

▼ **Meeting Template For Facebook Ads**

0. Quick Intro (10–15 seconds)

Keep it simple, confident, and professional.

Example:

"Hi, I'm [Your Name]. In this video, I'll walk you through your Facebook Ads performance using Meta's latest Andromeda framework — covering creative analysis, signals quality, targeting structure, optimization settings, and the fastest ways to reduce your cost per result."

1. Account Structure Audit (Andromeda Compliant)

After the Andromeda update, Meta strongly prefers **simplified account structures**.

Audit for:

- Too many campaigns (hurts learning)
- Too many ad sets (over-splitting)
- Manual controls limiting AI
- Overlapping audiences
- No consolidated Advantage+ campaign

What to highlight:

- "Fewer, larger audiences improve learning and reduce CAC."
- "We should merge these 3–5 campaigns based on objective."
- "Audience overlap is slowing down delivery and confusing the system."

2. Objective Alignment & Tracking Setup

Check:

- Correct campaign objective (Sales, Leads, Traffic, Awareness)
- Is the conversion event correct (Purchase, Initiate Checkout, Lead)?
- Are they optimizing for the wrong event?
- Aggregated Events properly configured?
- Event Match Quality score
- Pixel integration
- CAPI (Conversions API)

After the Andromeda Update — EMQ & Signals Are Critical

Show:

- EMQ score
- Missing parameters
- CAPI-Gateway issues
- Weak signal flow
- Duplicate events
- Server/Browser mismatch

Explain:

"A stronger signal quality helps Meta's AI understand your best customers and reduces cost up to 20–40%."

3. Creative Analysis (The MOST important part under Andromeda)

Meta Andromeda now gives **~70% optimization weight to creative**.

Audit:

- Creative format diversity (UGC, statics, videos, carousels)
- Hook strength (first 3 seconds)
- Ad clarity (offer, benefits, problem/solution)
- Branding style

- Aspect ratios (1:1, 4:5, 9:16)

- Relevance to audience intent

- Frequency of creative fatigue

- Use of **Advantage+ Creative** improvements

Explain:

"Because of Andromeda's new AI creative scoring, rotating fresh creatives every 7–14 days is essential."

4. Performance Metrics Breakdown (Aligned with Meta's new learning model)

Focus on Meta's preferred metrics:

Primary Metrics

- Cost per Result

- ROAS

- CPA/CPL

- CTR (link click)

- Outbound CTR

- Conversion Rate

- Frequency

- Add to Carts

- ThruPlay (for video ads)

Secondary Health Metrics

- CPM (indicates audience health)

- CPC

- Impressions Distribution

- Learning Phase status

- Auction Overlap

- Delivery Diagnostics

Show:

- Where ad sets are stuck in learning
- Which campaigns are under-delivering
- Where money is being wasted

5. Targeting & Audience Structure Audit (AI-Preferred)

After Andromeda, Meta favors **broad targeting with strong signals**.

Audit:

- Are they using Advantage+ Audience?
- Are they using unnecessary interest stacking?
- Are lookalikes outdated?
- Are custom audiences too small?
- Is retargeting underfunded?
- Any duplication between warm audiences and cold?

Explain:

"Meta's AI now outperforms manual targeting when the creative and signals are strong — we should simplify."

6. Campaign Settings (Andromeda Optimized)

Check:

- Attribution window (7-day click recommended)
- Bid strategy (Lowest cost vs. Cost cap)
- A/B testing setup
- Conversion location (Website / On-Facebook Forms)
- Advantage+ Shopping campaigns
- Advantage+ Audience
- Advantage+ Manual Controls (what's enabled or disabled)

Explain what should be changed:

- Turn on Advantage+ where helpful

- Remove manual placements

- Allow more automation to feed AI

- Remove unnecessary breakdowns

7. Sales Funnel & Offer Review (Critical for Performance)

Audit their entire funnel:

Top of Funnel (TOF)

- Awareness video performance

- UGC hooks

- Pattern interrupts

Middle of Funnel (MOF)

- Remarketing setup

- Engagement retargeting

- Website visitors retargeting

- 30-day vs. 180-day warming windows

Bottom of Funnel (BOF)

- Dynamic ads

- Abandoned cart recovery

- Returning visitor re-engagement

- Offer clarity and urgency

Explain:

"If the offer and funnel are weak, no amount of ads can fix the results."

8. Landing Page & Conversion Experience Review

Check:

- Page load speed
- Social proof
- Mobile responsiveness
- Checkout flow
- Offer clarity
- Trust elements
- Ad image vs. landing page mismatch
- Call-to-action relevance

This part is critical because Meta tracks **post-click behavior** to decide future delivery.

9. Competitor Benchmark & Industry Comparison

Compare their:

- Creative types
- Offer quality
- Landing page
- Ad frequency
- Video length
- Angles used
- Social proof presence

Clients LOVE this part because it shows exactly where they stand.

10. Action Plan (0–90 Days)

Break it into clear phases.

🔷 Phase 1: Quick Fixes (0–7 Days)

- Merge unnecessary campaigns

- Improve EMQ score

- Fix pixel/CAPI issues

- Test 3 new creatives

- Improve landing page headline

- Enable Advantage+ placements

- Fix audience overlap

🔷 Phase 2: Short-Term (7–30 Days)

- Launch fresh creative batch

- Test 2–3 hooks per creative

- Add retargeting sequences

- Add Advantage+ Shopping campaign

- Test new offer or value prop

🔷 Phase 3: Long-Term (30–90 Days)

- Build full creative testing pipeline

- Add UGC variations

- Run A/B tests

- Start Advantage+ full funnel structure

- Optimize repeat buyers & LTV

11. Closing Pitch (10–20 seconds)

End with confidence and clarity.

Example:

"If you'd like, I can take over your Facebook Ads and implement everything shown — optimizing your creative, fixing tracking, improving your signals, and scaling your account profitably using Meta's Andromeda framework. Just let me know, and I'll prepare a custom growth plan for your business."

▼ Meeting Template For Google Ads

0. Quick Intro (10–15 seconds)

What to say:

- Who you are

- What you will cover

- What results can they expect

Example:

"Hi, I'm [Your Name]. In this Google Ads audit, I'll show you where money is being wasted, where opportunities are being missed, and the exact changes that can reduce costs and increase conversions."

1. Account Structure Overview

Start by showing the overall account structure.

Check:

- Are campaigns grouped properly?

- Too many campaigns or ad groups?

- Are search, display, and video mixed incorrectly?

- Any naming confusion?

- Are Performance Max and Search competing?

Explain:

"A clear and simplified account structure improves Quality Score and reduces wasted budget."

2. Goal & Conversion Tracking Audit

This is one of the MOST important parts.

Check:

- Are conversions set up correctly?

- Any duplicate conversions firing?

- Enhanced conversions enabled?

- Tracking pixel correctly installed?

- Are they optimising for the right conversion?

- Are conversions imported from GA4? (if yes — ensure it's configured correctly)

Show the client:

- Which conversions matter

- Which ones should be removed

- Whether they're optimising for micro conversions instead of revenue-driving ones

This section shows your competence immediately.

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3. Campaign Type-by-Type Analysis

Break it down:

Search Campaigns

Audit:

- Match type structure

- Are they mixing broad, phrase, exact?

- Are ad groups focused or too broad?

- Keyword-to-ad relevance

- Location targeting accuracy

- Device bid adjustments

- Ad rotation settings

Performance Max Campaigns

Check:

- Asset quality

- Landing page quality

- Audience signals

- Are there conflicting PMax campaigns?

- Tracking quality (PMax is signal-hungry)

Display & Discovery Campaigns

Check:

- If they are wasting money

- Are placements low-quality?

- Any auto-generated ads hurting conversions?

Video / YouTube Campaigns

Check:

- Targeting strategy

- Irrelevant placements

- View rate

- Brand safety

4. Keyword & Search Term Analysis

This is where many accounts lose money.

Analyze:

- Wasted spend from irrelevant keywords

- Irrelevant search terms triggering ads

- Low-intent keywords draining budget

- Branded vs. non-branded mix

- High CPC keywords with low conversions

- Negative keywords missing

- Broad match used incorrectly

Show real examples of wasted spend.

This convinces clients instantly.

5. Ad Copy & Assets Audit (Quality Score Focus)

Check:

- Are headlines unique?

- Is the USP clear?

- Are they using keyword insertion?

- Is the description persuasive?

- Are there enough extensions? (Sitelinks, callouts, snippets, price, promo, images, lead forms)

- Are ads compliant with Google Ads best practices?

Explain:

- Poor ad copy reduces Quality Score

- Lower QS = higher CPC & fewer impressions

6. Landing Page Experience Review

Google heavily weighs landing page quality.

Check:

- Page load speed

- Mobile responsiveness

- Message alignment (ad → page)

- Trust elements

- Offer clarity

- Call-to-action visibility

- Form friction

- Relevancy to keyword intent

Explain:

"Even the best ads can't compensate for a low-quality landing page."

7. Wasted Spend Opportunities (Clients LOVE this)

This is the section that wins you the job.

Show:

- Wasted budget on irrelevant search terms

- Wasted spend from Display & PMax

- Underperforming keywords

- Overspending on cold audiences

- Wrong geo targeting

- Ads are showing 24/7 unnecessarily

- Low-converting devices

- Irrelevant placements

Put numbers:

"You wasted around $X last 30 days — we can save this immediately."

8. Performance Analysis (KPIs Breakdown)

Review key metrics:

- CTR

- Conversion Rate

- Cost per Acquisition (CPA)

- ROAS

- Impression Share

- Quality Score

- Search Lost IS (budget & rank)

- CPC trends

- Conversion volume

- First-time impression share

- PMax new vs. existing customer data

Explain what is strong, what is weak, and what needs improvement.

9. Scaling Opportunities (High-Impact Section)

Explain how to grow profitably:

- Expand exact match keywords

- Add high-intent keywords

- Add competitor campaigns

- Add branded campaigns (if missing)

- Launch a fresh PMax with better signals

- Split retargeting layers

- Add lead forms or call ads

- Test multiple landing pages

- Bid strategy upgrade (tROAS / tCPA)

- Better audience signals for PMax

Clients love hearing how you can increase volume while reducing cost.

10. Strategy & Recommendations (0–90 Days)

Break improvements into phases:

Phase 1: Quick Fixes (0–7 Days)

- Fix conversion tracking

- Add negative keywords

- Correct geo targeting

- Reduce wasted search terms

- Improve ad copy

- Clean up keywords

- Remove low-quality placements

Phase 2: Optimization (7–30 Days)

- Add new ad variations

- Improve landing pages

- Add extensions

- Restructure campaigns

- Better audience signals for PMax

- Test new creative assets

Phase 3: Scaling (30–90 Days)

- Expand winning keywords

- Increase budget gradually

- Add new customer acquisition PMax

- Add competitor conquest campaigns

- A/B test landing pages

- Implement smart bidding strategies

- Use call-only ads or performance forms

11. Closing Pitch (20 seconds)

Soft, confident, and value-focused.

Example:

"If you'd like, I can take full ownership of your Google Ads, fix the tracking issues, improve your campaigns, reduce wasted spend, and scale your results profitably. Let me know and I'll prepare a customised plan for your business."