



WORKSHEET · FREE RESOURCE

Make one offer easier to choose.

A working checklist for one commercially important offer: who it is for, why you win, the proof, where it is listed, what AI assistants understand about it, and what the business earns.

OFFER / PAGE URL	OWNER	DATE REVIEWED

01

The buying situation.

Use your actual sales conversations: recent inquiries, objections and the reasons customers chose you.

CUSTOMER

WHY WE ARE A STRONG FIT

PROBLEM AND CONSTRAINTS

WHEN WE ARE NOT A FIT

02

The positioning.

One clear sentence someone else could repeat accurately.

We help _____ solve _____ with _____, supported by _____.

03

The evidence.

Put the proof beside the promise. Every claim gets a source, an owner and a date.

CLAIM	SUPPORTING EVIDENCE / SOURCE URL	OWNER	LAST VERIFIED
Price or pricing process			
Specifications or service scope			
Availability / service area			
Delivery or response terms			
Warranty / returns / exclusions			
Customer evidence used with permission			
Next step to buy or request a quote			

The distribution.

Check only the channels that fit what you sell.

☐ **Page and feed agree.** Visible page text matches the catalog or feed.

☐ **Google.** Indexing, and relevant Business Profile and Merchant Center information.

☐ **Shopify.** Catalog eligibility, product count, data mapping and relevant channels.

☐ **Service businesses.** Service pages, business listings and a working inquiry path.

The diagnostic.

Five real buying questions, tried in the assistants your customers use. Keep a baseline before you change anything, then repeat later. Answers can vary between runs.

#	DATE	PLATFORM	EXACT QUESTION	BUSINESSES MENTIONED	CLAIMS	SOURCE LINKS	GAP TO FIX
1							
2							
3							
4							
5							

The business result.

Cited, arriving, choosing you again. Track the outcome your business actually needs.

PERIOD	CITATIONS WHERE REPORTED
IDENTIFIABLE REFERRAL VISITS	QUALIFIED INQUIRIES
ORDERS AND MARGIN	RETURNS / SUPPORT COSTS
REPEAT CUSTOMERS	ATTRIBUTION GAPS

This is a working checklist, not a ranking formula. Use only substantiated claims.