



## Pre-Work: Web Presence Self-Assessment

Before your coaching session, complete this form and be prepared to discuss results with your business consultant. To see an example, please refer to the “Case Study” document at [chase.com/coaching](https://chase.com/coaching).

Background – in 10 words or fewer, please describe:

### 1. What is your product/service?

### 2. Who is your core customer?

a.) Age

b.) Gender

c.) Geographic Info

d.) Psychographic info (personality, values, activities, interests, opinions)

### 3. What differentiates your products/services from those of your competitors (i.e., your value proposition)?

### 4. What are the consistent, human-like traits (e.g., thoughtful, joyful, straightforward, playful, etc.) that are unique to your brand (i.e., your brand personality)?



## Curated Coaching for Entrepreneurs

### STEP 1 – Complete a Website Brand Audit

Using your answers to the questions above, complete the grid below to assess how well you’re reflecting your brand in each element of your website.

#### Website Brand Audit

Website brand elements	How does this element reinforce my brand?	To what degree is the brand reinforced?
<b>Home page</b> Company description, value proposition		High Medium Low
<b>About Us page</b> Description, photos: owner(s), store		High Medium Low
<b>Design</b> Layout, color, font, logo		High Medium Low
<b>Imagery</b> Photos, videos		High Medium Low
<b>Copy</b> Tone/brand voice, writing style		High Medium Low
<b>Service</b> Policies, contact us, client testimonials		High Medium Low
<b>Blogs</b> (e.g., thought leadership, values, behind-the-scenes)		High Medium Low

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### STEP 2 – Complete a Website Usability Audit

Define your goal(s) for your website (e.g., drive online sales, drive sales in-store, provide information about your products, build your reputation as an expert, other):

Next, complete the table below to assess how your website elements and user functionality help you achieve those goals.

### Website Usability Audit

Key website usability elements	Response	Explanation
<b>Ability to attract core customers</b> Does your website appeal to your core customer?	Yes No Not sure	
<b>Layout and ease</b> How would you characterize the layout and navigation of your website? <i>(select all that apply)</i>	Simple and organized in a logical fashion Easy to navigate; fewer than four clicks needed to accomplish a task Overall look and feel is consistent across all pages Other	
<b>Content</b> Describe your website content. How is your core customer able to interact with the business? <i>(select all that apply)</i>	Clear and concise; meets the needs of my core customer Timely and relevant content Engaging and useful videos <i>(e.g., "how to" videos)</i> Customers can sign up for more information Useful FAQs Other	
<b>Search engine optimization</b> Do you think your core customers can easily navigate to your website? <i>(Use tools such as <a href="#">Test My Site</a> and <a href="#">Google Keyword Planner</a>, <a href="#">Trends</a> and <a href="#">Search Console</a> to evaluate and answer)</i>	Yes No Not sure	
<b>Comparison to competitors</b> How does your website compare with your competitors? <i>(select all that apply)</i> <i>(Review three to four of your key competitors' websites and consider using <a href="#">semrush.com</a> to evaluate and answer)</i>	My site: Has better content Is easier to navigate Establishes expertise Speaks to my core customer Other	

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