

# Website Self-Evaluation Form



L I M I T L E S S

WEBSITE:

Use the assessment below to evaluate and grade your website while looking for opportunities to improve.

**For each item below, please evaluate your website using the following scoring system:**

- 1 - We don't have this!
- 2 - Not sure if we have this.
- 3 - Have it, but a re-evaluation couldn't hurt.
- 4 - Good to go!

## HEADLINE

1  2  3  4

## KEY MARKETING MESSAGE

1  2  3  4

## BRAND PROMISE/ VALUE PROPOSITION

1  2  3  4

## CALL TO ACTION

1  2  3  4

## PROOF OF CONCEPT

1  2  3  4

TOTAL SCORE:

**Total Score = 10 or less**  
It's time for a website overhaul.

**Total Score = 11 - 14**  
It's time to refresh your website to reflect best practices.

**Total Score = 15 or more**  
Good work! Look for opportunities to maximize website conversions.

# Website Self-Evaluation Form



L I M I T L E S S

WEBSITE:

## How Best Practices Show Up

**DEFINE FINANCIAL** ABOUT SERVICES BLOG CLIENTS FREE ASSESSMENT

**HEADLINE**: Retirement Planning For Individuals Over Age 50

**KEY MARKETING MESSAGE**: REDUCE TAXES · INVEST SMARTER · OPTIMIZE INCOME

**CALL TO ACTION**: GET YOUR FREE ASSESSMENT →

**PROOF OF CONCEPT**: Named #2 Financial Advisor in U.S.

**BRAND PROMISE / VALUE PROPOSITION**: WHY DEFINE FINANCIAL? Not all financial advisors are created equal.

- FIDUCIARY**: Fi-du-ci-what!? It's simple — we are personally liable if we give you bad advice.
- COMMISSION-FREE**: No hidden fees. Our transparent fee schedule makes it easy to understand exactly how we get paid.
- CFP® PROFESSIONAL**: Only 25% of U.S. financial advisors are CERTIFIED FINANCIAL PLANNER™ Professionals.\*

### PEER REVIEW 1

Headline

- 1
- 2
- 3
- 4

Brand Promise / Value Proposition

- 1
- 2
- 3
- 4

Proof of Concept

- 1
- 2
- 3
- 4

Key Marketing Message

- 1
- 2
- 3
- 4

Call to Action

- 1
- 2
- 3
- 4

Comments

### PEER REVIEW 2

Headline

- 1
- 2
- 3
- 4

Brand Promise / Value Proposition

- 1
- 2
- 3
- 4

Proof of Concept

- 1
- 2
- 3
- 4

Key Marketing Message

- 1
- 2
- 3
- 4

Call to Action

- 1
- 2
- 3
- 4

Comments

### PEER REVIEW 3

Headline

- 1
- 2
- 3
- 4

Brand Promise / Value Proposition

- 1
- 2
- 3
- 4

Proof of Concept

- 1
- 2
- 3
- 4

Key Marketing Message

- 1
- 2
- 3
- 4

Call to Action

- 1
- 2
- 3
- 4

Comments