

PAGES

- Before the Session
- During the Session
- Session Close

SEND THIS TO

SESSION DATE

Think about your business and answer these based on how it affects you and the people you serve – whether that's a paying customer or someone on the other end of what you do.

# LET'S GET ON THE SAME PAGE.

Take a few minutes to think through these before we sit down together. No tech knowledge needed — just answer in your own words.

**1. What does your business do — in one sentence, the way you'd say it to someone who's never heard of you?**

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THESE TWO GO TOGETHER — SOMETIMES THEY'RE THE SAME PERSON, SOMETIMES THEY'RE NOT

**2. Who pays you?**

*Who's the person writing the check or clicking buy?*

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**3. Who actually uses or benefits from what you offer?**

*The end of the line — the person it's really for.*

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THESE TWO GO TOGETHER — FEELING DRIVES ACTION

**4. How do you want someone to FEEL when they land on your site?**

*Confident? Relieved? Excited? Like they found the right place?*

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**5. What do you want them to DO?**

*Call you? Book something? Buy? Just know you exist and trust you?*

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**6. What's bugging you most about your site right now — or what would embarrass you if a customer saw it?**

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**7. Is there anything that's just wrong — outdated info, missing stuff, things that don't reflect where you are now?**

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**8. Have you seen any site — doesn't have to be in your industry — that felt right to you? What did you like about it?**

*Even just a vibe. "Clean." "Trustworthy." "Looked like they knew what they were doing."*

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**9. Is there anything you absolutely don't want changed?**

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# THE TRACK

working session

# WORKING LOG

One row per problem, question, or thing we tried. Write fast — details matter later.

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SITE / PROJECT

WORKING WITH

PLATFORM / TOOL

GOAL TODAY

One row per problem or question. Write fast — don't worry about filling every column.

QUICK CAPTURE

URLS · FILE NAMES · PASSWORDS · ANYTHING FLYING AT YOU

WORKING LOG

#	PROBLEM OR QUESTION <small>WHAT ARE WE TRYING TO FIGURE OUT?</small>	WHAT WE DECIDED <small>ANSWER, DIRECTION, OR CHOICE MADE</small>	WHAT I DID <small>ACTION TAKEN</small>	DONE? <small>✓ OR FOLLOW-UP</small>
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

# THE TRACK

working session

## SESSION CLOSE

Fill this out before you pack up. Take a photo — text it to whoever you were working with.

PAGES

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SESSION DATE

NEXT SESSION

Fill this out before you leave. Take a photo and text it to whoever you were working with so you're both looking at the same thing.

BIGGEST WIN TODAY

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WHAT WE FINISHED ✓

STILL OPEN - NEEDS FOLLOW-UP

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WHO DOES WHAT BEFORE NEXT TIME

ME 

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ME 

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ME 

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THEM 

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THEM 

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THEM 

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NOTES · THINGS TO REMEMBER · NEXT SESSION STARTING POINT

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