M4TRIX DEV

FREE CHECKLIST

The Beginner's Checklist for Lead Generation

14 simple checks to see how ready you are to start more conversations with the right clients.

1 Plan

2 Visibility

3 Conversations

4 Convert

Score yourself in **5 minutes**. Tick yes only for an honest yes.

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PART ONE

01

Plan

Know what you sell, and to whom.

☐ Tick yes only if you can honestly say yes. If you answer partially, it is a no.

1

CHECK 1 / PROBLEM

I know the real problem I solve for my clients. It is not what I do. It is a pain big enough that they will pay someone to fix it.

☐ YES

Tip: Everyone talks about what they do. Your client only cares about the problem they want gone.

2

CHECK 2 / IDEAL CLIENT

I know exactly who has this problem. I can name five real clients or prospects who fit, and I could find 100 more like them.

☐ YES

Tip: Write down your five best clients and what they share. That is your ideal client.

3

CHECK 3 / OFFER

I have an offer built around a result, not around activities, and a stranger would understand it in ten seconds.

☐ YES

Tip: Nobody buys what you do. They do not buy your services or your process. They buy the result they want, whatever that is for them. Sell the result.

4

CHECK 4 / TARGETS

I know how much money I want to make, and I have worked backwards to the number of clients and conversations it takes.

☐ YES

Tip: Start with the money. Say you want £120,000 a year and your offer is £5,000. That is 24 clients. With a 20% conversion rate, you need 120 conversations a year, which is 10 a month.

Add up your ticks for Plan _____ / 4

PART TWO

Visibility

02

Be easy to trust and easy to find.

5

CHECK 5 / WEBSITE

I have a website with clear branding, and my offer is front and centre, so a visitor knows within seconds what I solve and what to do next.

☐ YES

Tip: Open your home page on your phone and look at it as a stranger would. Is it clear what you offer and what to do next? If it takes a moment to work out, that is a good place to start.

6

CHECK 6 / PROOF

I have proof that holds up on all three counts: enough reviews, good reviews and recent reviews, on a Google Business Profile, Trustpilot or a review site in my niche.

☐ YES

Tip: Focus on **quantity**, **quality** and **recency**. Are you in the top 3 for reviews among your local competitors? Are the reviews genuinely good? Is the latest one from the last few weeks? You do not need to be perfect, just credible.

7

CHECK 7 / LEAD MAGNET

I have a free offer or a no brainer first step that lets a stranger get in touch with my world without having to commit.

☐ YES

Tip: Make it something small and useful that solves one problem fast, like a checklist, a quick audit or a short guide. If the only next step you offer is "book a call", most people will not take it.

8

CHECK 8 / SOCIAL

I am active on one social channel, with a light touch. I post often enough that a new contact who checks me out sees a real, current business.

☐ YES

Tip: Be where your target audience already is. LinkedIn and Instagram are just examples. Post about once a month or so. You do not need millions of followers, you just need to look alive.

Add up your ticks for Visibility _____ / 4

PART THREE

03

Conversations

Start talking to the right people.

9

CHECK 9 / BORROWED TRUST

I have a way to generate consistent referrals from my network, whether that is in person networking, marketplaces, listings or partners.

☐ YES

Tip: Ask who already talks to your ideal clients before you do. An accountant, a networking group, a marketplace. One warm introduction beats ten cold messages.

10

CHECK 10 / OUTREACH

I have a system to reach new people outside my own network circle, and it starts new conversations consistently, every month, not only when work goes quiet.

☐ YES

Tip: A system means a set number, a set day and a set channel, such as email or LinkedIn, booked in your diary. Busy periods are exactly when the pipeline dries up three months later.

11

CHECK 11 / TRAFFIC

I have a steady way to bring the right visitors to my website, such as Google search, Google Ads, AI search or content, and I know which source sends the most.

☐ YES

Tip: A beautiful website nobody visits is a shop on an empty street. Check your last month of visitors. If you cannot name where most of them came from, you do not have a traffic plan yet. Content that answers what your clients search for is one of the best long term sources.

Add up your ticks for Conversations

_____ / 3

PART FOUR

04

Convert

Turn conversations into clients.

12

CHECK 12 / PIPELINE

I have a pipeline with clear stages, so I can see at any moment who is a new lead, who is in conversation, who has a quote and who is about to close.

☐ YES

Tip: Write your stages on one line: new lead, conversation, proposal, won or lost. If a lead cannot be placed on that line, it is probably drifting.

13

CHECK 13 / FOLLOW UP

I have a system to consistently follow up with people who have shown interest in my offer, so no lead is lost because I forgot.

☐ YES

Tip: Most deals are lost in the silence after the first conversation. Give every interested contact a next step and a date. If a lead has no date next to it, nobody is following up.

14

CHECK 14 / ATTRIBUTION

I have a method to classify where my leads come from, I know my conversion rate for each source, and I use those numbers regularly to decide where to put my marketing effort.

☐ YES

Tip: Ask every new lead how they heard about you and write it down. After three months you will see which source brings the most leads and which brings the most clients. Do more of the second.

Add up your ticks for Convert

_____ / 3

YOUR SCORE

14

Where do you stand?

Add up all four parts. One point for every honest yes.



My total score

Plan ____ Visibility ____ Conversations ____ Convert ____

Be honest. A low score is not bad news. It simply shows you where the next conversation is hiding.

0 to 4
LEAKING LEADS

Leaking leads

Conversations are slipping away at several points. The good news is that the first fixes are usually simple and the gains are fast. Start with checks one to four, because everything else depends on them.

5 to 9
INCONSISTENT

Decent but inconsistent

Some things work, but results depend on luck, mood or how busy you are. Find your weakest part, Plan, Visibility, Conversations or Convert, and fix that one first.

10 to 14
READY TO SCALE

Ready to scale

Your basics are solid. Now it is about doing more of what works, and tightening the numbers.

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From where you are, to what to do next.

The checklist shows you where you stand. A yes or no can only tell you so much. In a **free call**, we look at your real situation and pick the **three things** that would bring you the most leads. Not a grand plan, just specific actions for you, with a clear order.

The plan is yours to keep. Do it yourself, hand it to someone else, or, if you would like, let us do the work for you. It is what we do every day, and our clients are getting real results from it.

Book my free Lead Flow Audit

Free. No pressure. You keep the plan either way.
cal.com/m4trixdev/30min

Scan to book

100+
websites and funnels built

600+
entrepreneurs mentored

98+
client reviews



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