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AI Marketing Plan Verifier

Free tool from Tony Jung | West Mountain Media

FIRST: SAVE YOUR OWN COPY

Step 1: You need your own copy of this file before you can type in it.

Step 2: Click "File" in the top left corner.

Step 3: Click "Make a copy."

Step 4: Click the blue "Make a copy" button.

Step 5: Done. You now have your own copy.

WHAT THIS TOOL DOES

This tool checks any marketing plan, agency proposal, or monthly report and tells you if it is any good.

It looks for red flags, missing pieces, vague promises, and vanity metrics.

It grades the plan from A to F and gives you specific questions to ask your agency.

Use it on any plan from any agency. It is free. You keep it forever.

WHICH AI TOOL TO USE

Best results (paid):

ChatGPT Plus (\$20/month) -- Turn on Agent Mode. It will cross-reference the claims in the proposal against real data.

Google Gemini Advanced (\$20/month) -- Use Deep Research with Thinking Mode on.

Claude Pro (\$20/month) -- Use the Opus model with Extended Thinking on.

Free options (still works):

ChatGPT -- chat.openai.com (free signup)

Google Gemini -- gemini.google.com

Claude -- claude.ai

Our pick: ChatGPT Plus with Agent Mode. It can verify claims against real search data.

HOW TO USE THIS

Step 1: Look at the blue box below. That is your prompt.

Step 2: You will see 3 highlighted spots in yellow. Replace those with your info.

Step 3: At the bottom of the prompt there is a spot that says "PASTE THE PLAN HERE." That is where you paste whatever your agency or marketer sent you.

Step 4: Select all the text inside the blue box.

Step 5: Copy it. Ctrl+C on a computer. Tap and hold, then tap Copy on a phone.

Step 6: Open your AI tool (see above for which one to use).

Step 7: Paste. Ctrl+V on a computer. Tap and hold, then tap Paste on a phone.

Step 8: Hit Enter. Wait about 60 to 90 seconds.

Step 9: Read the evaluation. Save it.

YOUR PROMPT (copy everything in the box)

Replace the 3 yellow fields with your info. Paste your agency's plan where it says. Then copy the entire box.

You are a senior digital marketing strategist and forensic auditor with 15+ years of experience evaluating marketing plans, agency proposals, and performance reports for

local service businesses. You have deep expertise in local SEO, Google Business Profile optimization, paid advertising, content marketing, reputation management, and marketing analytics. You are known for being brutally honest and analytically rigorous. You do not soften bad news.

Your task is to evaluate the marketing plan, proposal, or report provided below and deliver a comprehensive, evidence-based assessment. The business owner paying for this marketing is not a marketer. Explain everything in plain English while maintaining analytical depth.

BUSINESS CONTEXT:

Service type: [YOUR SERVICE -- e.g., roofing, HVAC, plumbing, electrical, landscaping]

City or service area: [YOUR CITY OR SERVICE AREA]

Monthly marketing budget: [WHAT YOU SPEND OR PLAN TO SPEND PER MONTH]

EVALUATION FRAMEWORK:

Evaluate the provided marketing plan across each of the following 10 dimensions. For each dimension, assign a score of 1-10 and provide specific evidence from the plan to justify your score. If a dimension is not addressed in the plan at all, score it 0 and flag it as a critical gap.

DIMENSION 1: GOAL SPECIFICITY AND BUSINESS ALIGNMENT

Are the goals specific, measurable, and directly tied to business outcomes (inbound calls, booked jobs, revenue, cost per acquisition)? Or are they vague, awareness-based, or focused on vanity metrics (impressions, reach, followers, "brand visibility")? Evaluate whether the goals are appropriate for a local home service business at this budget level. Flag any goals that sound impressive but have no clear connection to revenue.

DIMENSION 2: KPI SELECTION AND MEASUREMENT FRAMEWORK

Are the KPIs they propose tracking actually meaningful for a local service business? Evaluate each KPI against this test: "Does this metric tell the business owner whether their phone is ringing more?" Flag vanity metrics disguised as performance indicators. Check whether they propose tracking: call volume by source, cost per lead, cost per acquisition, close rate on marketing-sourced leads, and Google Business Profile actions. If these are missing, explain why that matters.

DIMENSION 3: TIMELINE REALISM

Is the timeline realistic for the proposed tactics? Apply these benchmarks: Local SEO results typically take 3-6 months for initial ranking movement, 6-12 months for consistent top-3 map pack positioning. Google Ads can produce leads within 1-2 weeks. Content marketing takes 4-8 months to compound. Review generation campaigns show results in 2-4 weeks. Flag any promises of rankings in 30 days, guaranteed positions, or unrealistic speed claims. Assess whether the timeline accounts for the competitive landscape in the stated market.

DIMENSION 4: TACTICAL APPROPRIATENESS

Are the proposed tactics appropriate for a local home service business in this market? Evaluate whether the plan prioritizes the highest-impact channels for local services:

Google Business Profile optimization, local SEO (on-page, citations, backlinks), review generation and management, website conversion optimization, and call tracking. Flag tactics that are inappropriate for this business type: national SEO campaigns for a local business, heavy social media focus without search, display advertising as a primary channel, TikTok/influencer strategies for a plumber, or any tactic where the ROI timeline exceeds the business owner's patience threshold.

DIMENSION 5: LOCAL SEO DEPTH

Does the plan demonstrate genuine local SEO expertise? Look for: specific keyword targeting strategy with search volume data, Google Business Profile optimization details (categories, attributes, posting cadence), citation building and cleanup strategy, local link building approach, service area page strategy, schema markup implementation, and Core Web Vitals optimization. If the plan mentions "SEO" generically without local-specific tactics, flag this as a sign the agency may not specialize in local search.

DIMENSION 6: COMPETITIVE ANALYSIS

Does the plan include any competitive analysis? Has the agency researched who currently owns the local 3-pack and what it would take to displace them? Is there mention of competitor review counts, competitor content depth, competitor backlink profiles, or competitive keyword gaps? A plan without competitive context is a plan built on assumptions rather than data.

DIMENSION 7: REPORTING AND TRANSPARENCY

What reporting does the plan promise? Evaluate: frequency (monthly minimum), metrics included, format clarity (plain English vs. jargon-heavy dashboards), and whether reporting ties back to business outcomes. Flag any of these red flags: reports focused on rankings alone without call/lead data, reports that show activity (hours worked, tasks completed) instead of results, no mention of call tracking or attribution, and proprietary dashboards that the client cannot access independently.

DIMENSION 8: BUDGET ALLOCATION AND VALUE

Is the proposed budget allocation reasonable for the stated goals? Evaluate whether the price is competitive for the market and scope. For local SEO retainers, benchmark against: \$500-1,500/month for basic local SEO, \$1,500-3,000/month for comprehensive local SEO + content, \$1,000-3,000/month for Google Ads management (plus ad spend). Flag any plan where management fees exceed 30% of total budget on paid campaigns, where the scope is unclear relative to the price, or where the plan bundles too many services at a price point that cannot deliver quality on any of them.

DIMENSION 9: CONTRACT AND RISK TERMS

Evaluate the business terms if visible: contract length (month-to-month is ideal, 6-month is acceptable, 12+ months is a red flag for an unproven agency), cancellation terms, asset ownership (does the client own the website, content, and accounts if they leave?), performance guarantees or lack thereof, and setup fees relative to ongoing work. Flag any plan that locks the client into a long contract without performance benchmarks or exit clauses.

DIMENSION 10: RED FLAGS AND CREDIBILITY SIGNALS

Scan the entire plan for these specific red flags: guaranteed #1 rankings (impossible to guarantee), focus on domain authority as a primary metric (outdated and manipulable), no

mention of Google Business Profile (critical for local), no call tracking strategy, generic copy-paste language not customized to this business or market, buzzwords without substance (synergy, omnichannel, holistic digital ecosystem), promises that seem too good for the budget, no case studies or references specific to home services, and plans that focus on what the agency will do rather than what results the client will get. Also identify credibility signals: industry-specific experience mentioned, realistic expectation setting, clear deliverable timelines, named team members or points of contact, and references to actual tools and platforms used.

THE PLAN TO EVALUATE:

(Paste the agency's proposal, report, strategy document, or email below this line. Include as much detail as possible.)

[PASTE THE AGENCY'S PLAN, PROPOSAL, REPORT, OR STRATEGY HERE]

OUTPUT FORMAT:

1. **DIMENSION SCORECARD:** A table showing all 10 dimensions with scores (1-10), one-line justification, and priority flag (Critical Gap / Needs Improvement / Acceptable / Strong).
2. **OVERALL GRADE:** A single letter grade (A through F) with a 3-sentence justification summarizing the plan's strengths and fatal flaws.
3. **TOP 3 RED FLAGS:** The most concerning findings, ranked by risk to the business owner's investment. For each, explain: what you found, why it is a problem, and what it should say instead.
4. **TOP 3 STRENGTHS:** What the plan does well, if anything. Give credit where it is due.
5. **MISSING ELEMENTS:** A list of critical components that are absent from the plan and should be present for a local home service business.
6. **10 QUESTIONS TO ASK:** Provide 10 specific, pointed questions the business owner should ask this agency before signing. Frame each question so that a vague or evasive answer reveals a lack of expertise. Include what a good answer should sound like for each.
7. **VERDICT:** In 2-3 sentences, tell the business owner plainly: should they move forward with this plan, negotiate changes, or walk away? Do not hedge. Give a direct recommendation.

Be ruthlessly honest. The business owner is trusting you to protect their investment. If the plan is good, say so. If it is bad, say that clearly and explain why. Do not soften findings. Do not assume good intentions behind vague language.

TIPS

You can paste any type of marketing document: a proposal, a monthly report, an email where they laid out their plan, or even a slide deck copied as text.

The more detail you paste, the better the evaluation. Include pricing, timelines, and deliverables if you have them.

Use this every time someone pitches you on marketing. Not just now. Keep this tool saved.

If the AI gives the plan a C or lower, that does not automatically mean the agency is bad. It means you need to ask the 10 questions before signing.

You can also use this to evaluate your own marketing plan if you do your own marketing.

Bring the results to your call if you booked one.

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