

Client Discovery Interview Notes — Website +
Local SEO + Social Setup
Prospect: ClearFlow Plumbing & Drain, LLC

Date/Interviewer

- Date: Oct 29, 2025
- Interviewer: Jamie Chen, Account Strategist (SparkSite Web Studio)
- Attendees (Client):
 - Owner: Miguel “Mike” Rivera (primary decision-maker)
 - Office Manager: Tara Nguyen (content/contact, billing)
 - Lead Tech: Jose Alvarez (service details/photos)

Company Snapshot

- Business type: Local residential/commercial plumbing contractor (licensed, insured)
- Location: 1287 NE Riverbend Rd, Redmond, WA 98052 (shop & dispatch)
- Service area: 25–30 mile radius (Eastside cities + limited Seattle jobs)
- Hours: Mon–Fri 7am–6pm; Emergency 24/7 on-call
- Differentiators: Same-day slots, transparent pricing ranges, clean-house policy (boot covers, floor protection), 4.8★ avg reviews (Google/Yelp), trenchless sewer repair expertise
- Top services: Emergency leaks, water heater install/repair (tank & tankless), drain cleaning & hydro-jetting, sewer camera inspections, repipes, fixture installs

Business Goals (in client’s words)

- “Get the phone to ring more from nearby homeowners.”
- “Show up on Google Maps for ‘plumber near me’ and ‘emergency plumber’.”
- “Make it easy to book and text us—less back-and-forth.”
- “Keep our five-star reputation visible and growing.”

Primary Outcomes/KPIs

- +30–50 new qualified calls/month within 3–4 months
- Map Pack visibility in target cities (track top 10 keywords)
- 10+ new Google reviews/month (steady cadence)
- Website conversion rate target 8–12% for local traffic
- Form leads + call tracking + GMB call clicks consolidated in a monthly report

Website Requirements

- New site (WordPress) with fast, secure managed hosting (target <2.5s LCP)

This is an example of raw client interview notes that are given to the RFP Analysis tool in place of an actual RFP. This example illustrates how the RFP Analyzer can be used for small-scale projects to quickly do a one-shot analysis, then generate a first-draft proposal.

[See the RFP Analyzer features](#)

- Pages (initial sitemap):

- Home (hero CTA “Call Now / Book Service”), trust badges, service highlights
- Services (hub) + individual service pages: Emergency, Water Heaters (tank/tankless), Drain Cleaning, Hydro-Jetting, Sewer Camera Inspection, Trenchless Repair, Repipes, Fixtures
- About (licenses, insurance, team photos, service guarantees)
- Areas We Serve (hub) + city pages (Redmond, Bellevue, Kirkland, Woodinville, Sammamish, Issaquah, Bothell)
- Specials/Finance (coupons, financing partners)
- Reviews (embed Google/Yelp, screenshots allowed with attribution)
- Blog/Tips (seasonal maintenance, “what to do if...”, water heater buyer’s guide)
- Contact (click-to-call, form, map, hours; optional live chat/text widget)

- Features/Functionality:

- Click-to-call & sticky CTA; emergency banner after-hours
- Booking request form (name, address, issue, preferred time) with simple routing
- Photo gallery (before/after), FAQs per service, financing CTA
- Schema markup: LocalBusiness/Plumber, Service, FAQ, Review snippets where applicable
- Accessibility: WCAG 2.1 AA best practices (color contrast, focus, alt text)
- Security: SSL, daily backups, firewall, auto-updates policy
- Analytics: GA4, Google Search Console, conversion goals (calls, forms, map clicks), optional call tracking numbers per channel

Local SEO Requirements

- Google Business Profile (GBP): audit/claim/optimize; categories, services, attributes, hours, service area; UTM on website link
- NAP consistency: primary citations (Apple Maps, Bing, Yelp, Nextdoor, Angi, Thumbtack, BBB, YP, industry directories); suppress duplicates
- Reviews engine: email/SMS review asks post-job (policy + templates); respond to all reviews, highlight 5★ on site
- Content for local intent: city/service pages with unique copy, embedded maps, localized testimonials, geo-tagged project spotlights
- Technical: fast mobile performance, Core Web Vitals, image compression; local business schema on NAP footer, per-page service schema

Social Media Setup & Content

- Profiles to create/refresh: Facebook, Instagram, Nextdoor Business, YouTube (shorts for tips), LinkedIn Company (for commercial). Optional: TikTok for quick fixes/how-tos.
- Branding kit: logos (SVG/PNG), color palette, typography, vehicle wrap photo set, team

headshots

- Content plan (initial 90 days): 2–3 posts/week (before/after, tips, safety, staff spotlights, reviews, promotions), 1 short video/week; boost select posts to service-area zip codes
- Ad-ready assets: square/vertical templates in Canva; rights-cleared music for shorts

Content & Assets (Client To Provide)

- Licenses/insurance docs, service list/pricing ranges, financing partner details, 10–20 recent job photos (with homeowner consent), 8–12 flagship reviews (with initials), team bios, logos, brand colors, any existing domain/hosting credentials

Integrations/Tools (Proposed)

- WordPress + lightweight theme + form builder (HIPAA/PII not required; standard consent)
- Call tracking (CallRail or similar) — swap on PPC only to preserve NAP; record with consent notice
- Scheduling: simple request form now; optional later integration with Housecall Pro/Jobber (client interested, undecided)
- Email marketing: Mailchimp starter list for maintenance reminders and reviews
- Chat/Text: optional text-enabled number (after phase 1)

Budget & Packages (client receptive to options)

- Good (Essentials): 8–10 page site, GBP optimization, top 25 citations, baseline schema, review engine setup — \$4.5k–\$6.5k
- Better (Growth): 14–18 pages incl. service-city pages, blog setup, monthly SEO for 3 months, call tracking, 3 promo graphics — \$8k–\$12k
- Best (Dominance): 20–24 pages, 6 city pages, 6 blog posts, monthly SEO & GBP posts (6 months), starter PPC setup/landing page, 3 short videos — \$15k–\$22k
- Hosting/Care Plan (recommended): \$65–\$125/mo (updates, backups, security, uptime, minor content edits). Client asked for non-contract monthly.

Timeline (target)

- Discovery & asset intake: 1 week
- Content & design: 2–3 weeks (wireframes → design comps → approvals)
- Build & QA: 2 weeks (mobile, speed, schema, forms, tracking)
- Launch + SEO/citations + GBP optimization: week 5–6
- Post-launch optimization/reporting: monthly thereafter

Risks/Constraints

- Photo/consent delays; review policy adoption; after-hours call capacity (ensure ads/CTAs align with staffing)

- Migration SEO risk if changing domains — plan 301 redirects and URL map
- Call tracking NAP consistency — use limited pools to avoid citation conflicts

Decision Process & Stakeholders

- Final approval: Owner (Mike)
- Content/editor: Tara
- Technical/service accuracy: Jose
- Preferred communication: Email + shared task board; weekly 20-min check-ins during build

Success Metrics (90-day post-launch)

- 200+ organic clicks/month; 8–12% site CVR; Map Pack top-10 for 8–10 target terms across primary cities; 30–50 incremental qualified calls/month; 30+ new Google reviews; <2.5s mobile LCP

Next Steps / Action Items

- SparkSite to send formal proposal with three package options, scope, timeline, and care plan
- Client to provide assets: logos, brand colors, top reviews, licenses/insurance, photos, financing details
- Schedule on-site half-day for photography (optional add-on)
- Confirm domain/hosting access or authorize SparkSite to provision managed hosting
- Approve sitemap and homepage wireframe prior to design

Notes/Quotes (verbatim snippets)

- “We’re fine with texting; our dispatcher can handle it during business hours.”
- “We want the emergency number front and center after hours.”
- “We don’t want bait-and-switch pricing—show realistic ranges, then confirm on site.”