
NAVIGATOR'S LOG R&D; · GBP MANAGEMENT SERVICE

Client Forms Package

This package contains all forms used in the Navigator's Log GBP management service: the client intake form, the GBP audit worksheet, the monthly report template, the service agreement summary, and the cancellation and offboarding record. All forms are fillable in print or digital format.

Forms 01–05 · Navigator's Log R&D; · Christopher Blake Head · Fresno CA · June 2026

FORM
01

New Client Intake Form

Navigator's Log R&D;

DATE OF INTAKE

BUSINESS NAME (LEGAL)

TRADE NAME / DBA (IF DIFFERENT)

BUSINESS ADDRESS (PHYSICAL — WHERE CUSTOMERS VISIT OR WORK IS PERFORMED)

CITY

STATE / ZIP

PRIMARY PHONE (ON GBP)

SECONDARY PHONE (IF ANY)

WEBSITE URL (LEAVE BLANK IF NONE)

OWNER / PRIMARY CONTACT NAME

BEST TIME TO REACH

OWNER EMAIL ADDRESS

REFERRAL SOURCE — HOW DID YOU FIND US?

BUSINESS INFORMATION

PRIMARY BUSINESS CATEGORY (WHAT GOOGLE
CURRENTLY SHOWS)

YEARS IN BUSINESS

NUMBER OF EMPLOYEES (APPROX.)

SERVICE AREA (CITY, RADIUS, OR ADDRESS RANGE)

DESCRIBE WHAT YOUR BUSINESS DOES — IN YOUR OWN WORDS, AS IF TELLING A NEW CUSTOMER

CURRENT DIGITAL PRESENCE

Check all that currently exist for this business:

☐ Google Business Profile

☐ Website

☐ Facebook

☐ Instagram

☐ Yelp listing

☐ Nextdoor

☐ Google Ads running

☐ Yelp Ads running

☐ Angi / HomeAdvisor listing

☐ Other paid advertising

APPROX. CURRENT GOOGLE STAR RATING (IF
KNOWN)

APPROX. CURRENT REVIEW COUNT (IF KNOWN)

HAVE YOU HAD ANY PREVIOUS GBP MANAGEMENT SERVICE OR DIGITAL MARKETING? IF YES, DESCRIBE BRIEFLY.

SERVICE TIER & AGREEMENT

☐ Tier 1 — \$75/month (Basic)

☐ Tier 2 — \$125/month (Standard)

☐ Tier 3 — \$175/month (Premium)

START DATE

MONTH-TO-MONTH ☐ OR 6-MONTH ☐

SPECIAL NOTES OR CLIENT REQUESTS

ACCESS GRANTED

GBP ACCESS GRANTED (MANAGER LEVEL) ■

DATE ACCESS CONFIRMED

GBP EMAIL / GOOGLE ACCOUNT USED FOR ACCESS GRANT

CLIENT SIGNATURE: _____ DATE: _____

NLR REPRESENTATIVE: _____ DATE: _____

Complete this form at initial onboarding and at each quarterly review. Compare current state against the prior audit to show progress.

BUSINESS NAME (AS ON GBP)

AUDIT DATE

AUDITOR INITIALS

PROFILE COMPLETENESS

Business name — exact legal name, no keyword stuffing ☐ Correct ☐ Needs fixPrimary category — most accurate available category ☐ Correct ☐ Needs fixAdditional categories (up to 9) ☐ Complete ☐ Needs additionsAddress — verified exact, matches signage ☐ Correct ☐ Needs fixPhone number — rings during listed hours ☐ Correct ☐ Needs fixWebsite URL — active, correct, loads properly ☐ Correct ☐ Needs fixHours — complete, including holidays ☐ Complete ☐ Needs fixBusiness description — 750 chars, no URLs ☐ Good ☐ Needs rewriteServices list — all services added ☐ Complete ☐ Needs additionsAttributes — all relevant attributes checked ☐ Complete ☐ Needs additionsOpening date — filled in ☐ Done ☐ Missing

PHOTOS

CURRENT PHOTO COUNT

COVER PHOTO UPDATED WITHIN 90 DAYS? ☐ Y ☐ N☐ Exterior photos ☐☐ Interior photos ☐☐ Team/staff photos ☐☐ Product/work photos ☐☐ Before-and-after pairs ☐☐ Logo uploaded ☐

REVIEWS

CURRENT STAR RATING

CURRENT REVIEW COUNT

REVIEWS RESPONDED TO (%)

OLDEST UNANSWERED NEGATIVE REVIEW (DATE IF KNOWN)

NOTES ON REVIEW PATTERNS — RECURRING COMPLAINTS, RECURRING PRAISE, ANYTHING UNUSUAL

POSTS & CONTENT

DATE OF MOST RECENT POST

POSTS IN LAST 30 DAYS (COUNT)

■ Offer post ■

■ Event post ■

■ Update post ■

■ Product post ■

■ Photo post ■

OVERALL AUDIT NOTES — WHAT NEEDS ATTENTION FIRST

FORM
03

Monthly Client Report Template

Navigator's Log R&D;

Complete and send to client by the 5th of the following month. Attach screenshots from GBP Insights where available.

CLIENT BUSINESS NAME

REPORT PERIOD (MONTH/YEAR)

REPORT PREPARED BY

WHAT WE DID THIS MONTH

Google Posts published

Count: ____

Customer reviews responded to

Count: ____

Profile edits or updates made

Count: ____

Photos uploaded

Count: ____

Q&A; entries added or updated

Count: ____

Citation corrections made

Count: ____

PROFILE PERFORMANCE (from GBP Insights)

METRIC	THIS MONTH	LAST MONTH	TREND
Total profile views	____	____	↑ ↓ →
Search impressions	____	____	↑ ↓ →
Map views	____	____	↑ ↓ →
Direction requests	____	____	↑ ↓ →
Phone calls from profile	____	____	↑ ↓ →
Website clicks from profile	____	____	↑ ↓ →
Star rating (end of month)	____	____	↑ ↓ →
Total review count (end of month)	____	____	↑ ↓ →
New reviews this month	____	____	↑ ↓ →

WHAT IMPROVED MOST THIS MONTH

WHAT WE ARE FOCUSED ON NEXT MONTH

ANYTHING THE CLIENT SHOULD KNOW OR ACTION THEY SHOULD TAKE

This is a plain-language summary of the service terms. It is not a legal contract. For a full service agreement, contact Navigator's Log R&D.; Both parties sign below.

CLIENT BUSINESS NAME

CLIENT FULL LEGAL NAME (OWNER / AUTHORIZED REPRESENTATIVE)

START DATE

SERVICE TIER

WHAT NAVIGATOR'S LOG PROVIDES

- ✓ Monthly GBP profile audit and maintenance
- ✓ Minimum 4 Google Posts per month (mix of offer, event, update, photo)
- ✓ Response to all new customer reviews within 48 business hours
- ✓ Monthly performance report delivered by the 5th of the following month
- ✓ GBP health monitoring — unauthorized edits, hours changes, suspensions
- ✓ Spanish-language content at Standard and Premium tiers
- ✓ Direct access to Christopher Blake Head for questions or concerns

WHAT THE CLIENT PROVIDES

- ✓ GBP Manager-level access (not Owner access) within 3 days of agreement
- ✓ Accurate business information including current hours, phone, and services
- ✓ Notification of any changes to hours, location, phone, or services within 48 hours
- ✓ Payment on the 1st of each service month
- ✓ 30 days written notice to cancel (email to powerpredixtable@proton.me)

WHAT THIS SERVICE DOES NOT INCLUDE

- X Google Ads or paid advertising management
- X Website design, development, or hosting
- X Guaranteed rankings or specific result promises — GBP results depend on market conditions
- X Social media management (Facebook, Instagram, TikTok)
- X Reputation removal — Navigator's Log responds to reviews but cannot guarantee removal of any review

MONTHLY RATE: \$ _____ **· PAYMENT METHOD:** _____

TERM: Month-to-month, cancellable with 30 days written notice. No long-term commitment required. No setup fee.

CLIENT SIGNATURE: _____ DATE: _____

NAVIGATOR'S LOG R&D: _____ DATE: _____

FORM
05

Cancellation & Offboarding Record

Navigator's Log R&D;

Complete when a client cancels or offboards for any reason. Keep on file. Used to calculate churn metrics and Steve's commission adjustments.

CLIENT BUSINESS NAME

ORIGINAL START DATE

CANCELLATION EFFECTIVE DATE

TOTAL MONTHS OF SERVICE

TOTAL REVENUE COLLECTED (\$)

STEVE'S REFERRAL? ☐ Y ☐ N

STEVE SHARE: _____% (PER PARTNERSHIP
AGREEMENT)

REASON FOR CANCELLATION

- | | | |
|---|---|---|
| ☐ Price / budget constraints | ☐ Found a competitor service | ☐ Business closed or sold |
| ☐ Unhappy with results | ☐ Did not see value | ☐ Changed their mind about GBP |
| ☐ Personal reasons (owner) | ☐ Moved out of service area | ☐ Other (see notes) |

CANCELLATION NOTES — WHAT DID THEY SAY?

OFFBOARDING CHECKLIST

- GBP Manager access removed ☐
- Final monthly report sent ☐
- Client notified of access removal date ☐
- Final invoice issued and resolved ☐
- Client record marked CLOSED in logbook ☐
- Steve notified of commission adjustment ☐

WOULD YOU REHIRE THIS CLIENT? ☐ YES ☐ NO ☐ MAYBE — NOTES