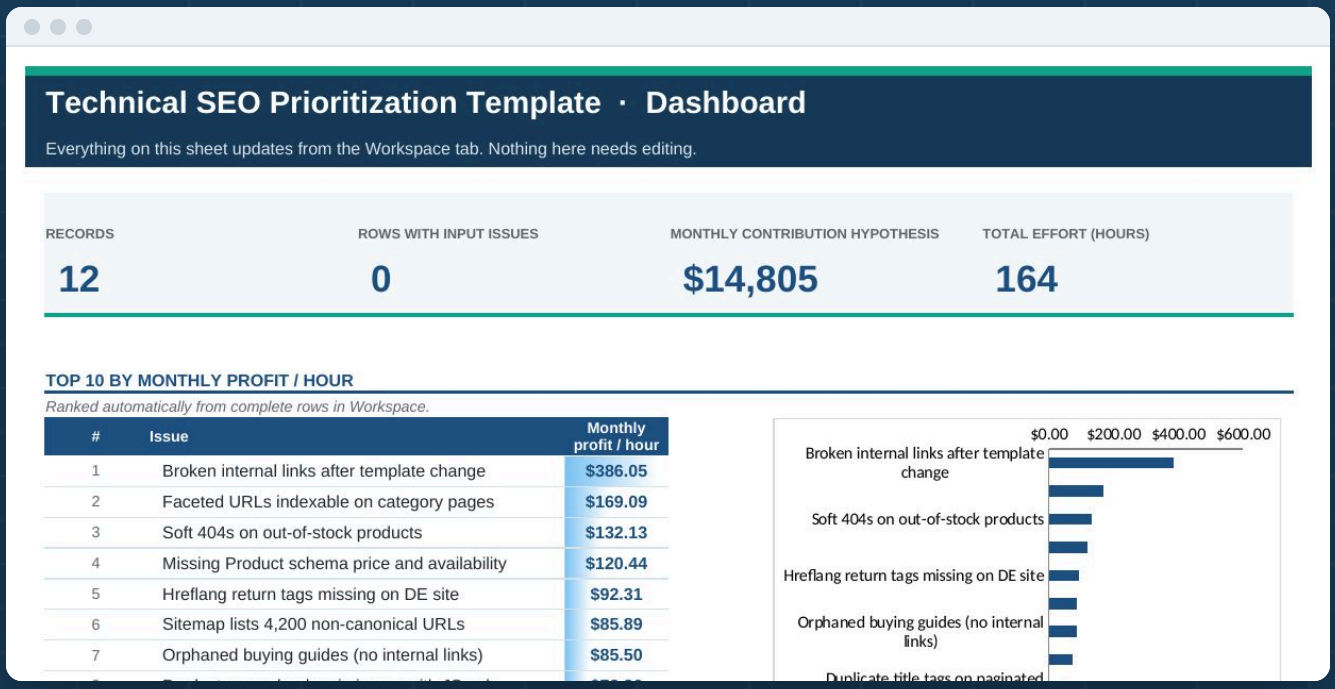
OptimizationTheory.com

40 templates, six toolkits, one desk reference

The SEO & GEO Field Handbook

Every field guide from the Optimization Theory toolkit in one place: what each template decides, how the formulas work, how to fill it in, a worked example and the mistakes to avoid.



Technical SEO Prioritization Template · Dashboard

Everything on this sheet updates from the Workspace tab. Nothing here needs editing.

RECORDS	ROWS WITH INPUT ISSUES	MONTHLY CONTRIBUTION HYPOTHESIS	TOTAL EFFORT (HOURS)
12	0	$14,805	164

TOP 10 BY MONTHLY PROFIT / HOUR

Ranked automatically from complete rows in Workspace.

#	Issue	Monthly profit / hour
1	Broken internal links after template change	$386.05
2	Faceted URLs indexable on category pages	$169.09
3	Soft 404s on out-of-stock products	$132.13
4	Missing Product schema price and availability	$120.44
5	Hreflang return tags missing on DE site	$92.31
6	Sitemap lists 4,200 non-canonical URLs	$85.89
7	Orphaned buying guides (no internal links)	$85.50

Version 3.0, November 2026

Jourdan Rombough, optimizationtheory.com

Contents

Each guide pairs with a free workbook and a full online tutorial. Page numbers refer to this handbook.

Keyword Research Toolkit

01	Keyword Prioritization Template	4
02	Keyword Mapping Template	15
03	SERP Overlap Keyword Clustering Template	25
04	Keyword Gap Analysis Template	35
05	Search Seasonality Planner	45
06	SEO Visibility Score Calculator	55

SEO Migration Toolkit

07	Site Migration URL Inventory Template	65
08	Redirect Mapping Template	75
09	SEO Migration Checklist	85
10	Post-Migration SEO Monitoring Template	94
11	Indexability Audit Template	104
12	Hreflang Audit Template	114

Technical SEO Toolkit

13	Technical SEO Prioritization Template	124
14	Crawl Budget Analysis Template	134
15	Core Web Vitals Tracker	144
16	Internal Linking Opportunity Template	154
17	XML Sitemap Audit Template	164
18	Schema Markup Audit Template	174

Content SEO Toolkit

19	SEO Content Brief Template	184
20	Content Audit Template	194
21	Content Decay Analysis Template	204
22	Keyword Cannibalization Checker Template	214
23	SEO Content Calendar Template	224
24	Title Tag CTR Test Calculator	234

AI Visibility & GEO Toolkit

25	AI Prompt Research Template	245
26	AI Citation Tracker	255
27	AI Share of Voice Calculator	264
28	Answer Evidence Audit Template	274
29	Brand Entity Consistency Audit	284
30	AI Referral Traffic Tracker	294

SEO Business & Delivery Toolkit

31	SEO Forecast Template	304
32	SEO ROI Calculator	314
33	SEO Split Test Calculator	324
34	Link Reclamation Template	334
35	Local Rank Grid Tracker	344
36	Ecommerce SEO Prioritization Template	353
37	Programmatic SEO Checklist	363
38	DataForSEO Cost Calculator	373
39	SEO Client Onboarding Checklist	383
40	SEO Roadmap Template	392

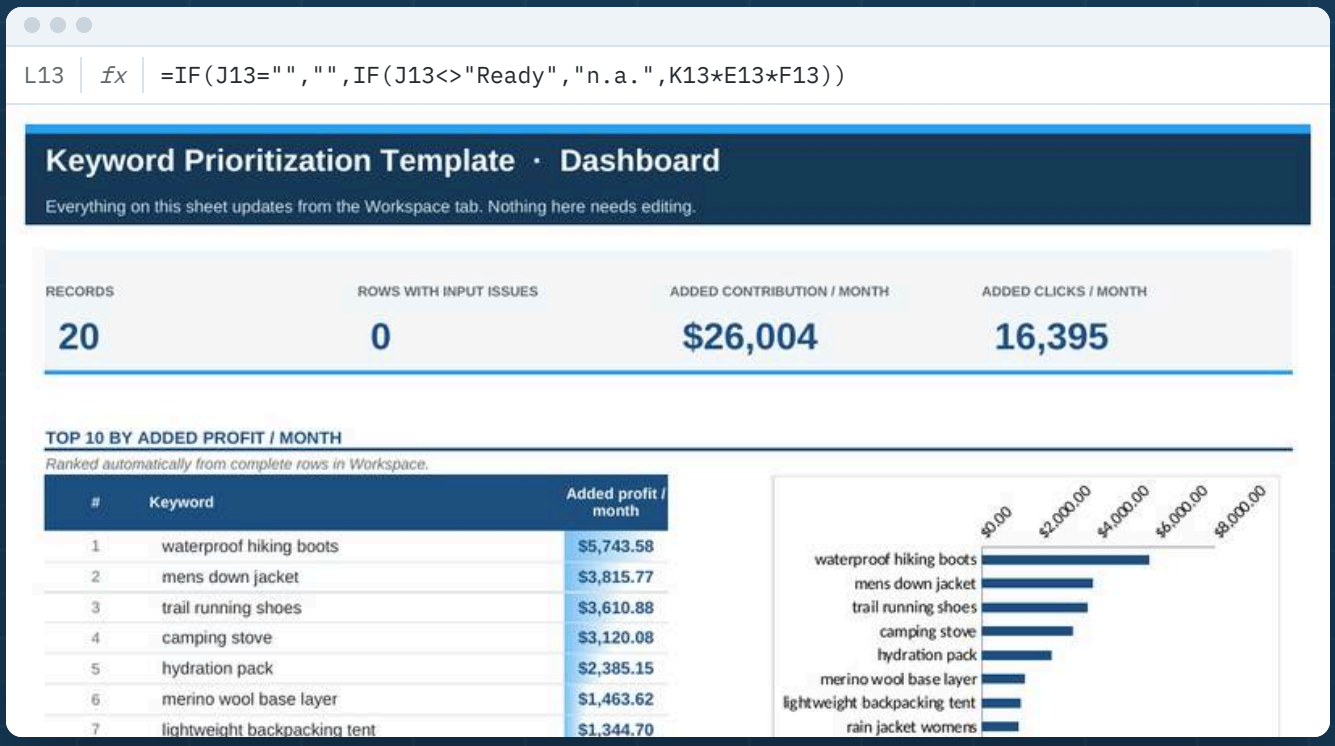
OptimizationTheory.com

Keyword Research Toolkit, resource 01

Keyword Prioritization Template

Rank every keyword by the profit it could add per hour of work, not by search volume alone.

Built for the DataForSEO API: Labs: Keyword Overview



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which keywords deserve your next hours of work, ranked by the monthly profit each could add per hour invested, with every assumption visible and editable.

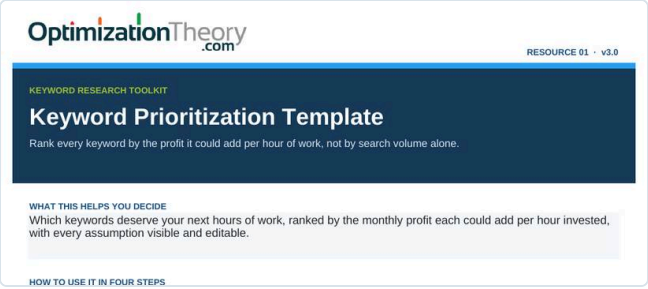
Most keyword lists get sorted by search volume, then difficulty, and that's where prioritization stops. The problem is that volume says nothing about whether the traffic converts, how much of it you can realistically win, or how many hours it will take to get there. A 40,000-search keyword you already rank fifth for can be worth less than a 2,400-search keyword you could move from page three to the top three with one good page.

This keyword prioritization template turns a raw keyword export into a ranked work queue. For each keyword it estimates the clicks you'd add by moving from your current CTR to a realistic target CTR, converts those clicks into monthly profit, then divides by the hours the work will take. The result is a single, defensible number for every keyword: added profit per work hour.

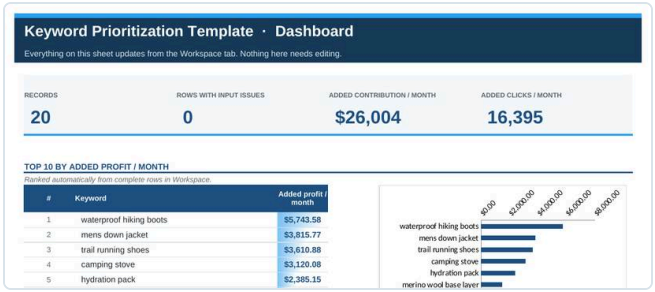
Who it's for

- SEOs choosing which pages to build or improve next quarter
- Agencies that need to justify a keyword plan to a client in money, not rankings
- Content leads with more ideas than writers
- Ecommerce teams deciding between category, product and guide content

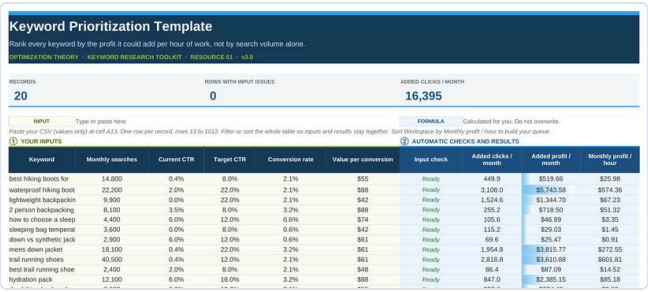
What's in the workbook



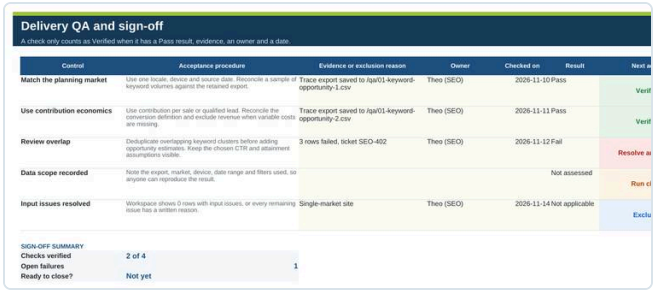
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 1,000 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Added clicks = search volume × (target CTR minus current CTR, never below zero) × attainment. Added profit = added clicks × conversion rate × value per conversion. Profit per hour = added profit ÷ work hours. Every input is a cell you can change, so a stakeholder who disagrees with an assumption can change it and watch the ranking move, instead of arguing about a black-box score.

The key formula, as written in the workbook

```
=IF(J13="","",IF(J13<>"Ready","n.a.",K13*E13*F13))
```

Result column	Plain-English formula	What it tells you
Added clicks / month	Monthly searches × MAX(0,Target CTR-Current CTR) × Attainment factor	Searches multiplied by the positive CTR gap and the attainment assumption.
Added profit / month	Added clicks ÷ month × Conversion rate × Value per conversion	Expected added clicks multiplied by conversion rate and contribution per conversion.
Monthly profit / hour	Added profit ÷ month ÷ Work hours	Monthly contribution opportunity per implementation hour.

How to use it, step by step

1

Export your keywords

Pull keywords with search volume from your keyword tool, and your current CTR per keyword from Google Search Console (clicks ÷ impressions). Use 0 if you don't rank.

2

Set realistic targets

Enter a target CTR for the position you can credibly reach, your conversion rate, value per conversion and an attainment factor (0.5 = you expect to capture half the modeled gain).

3

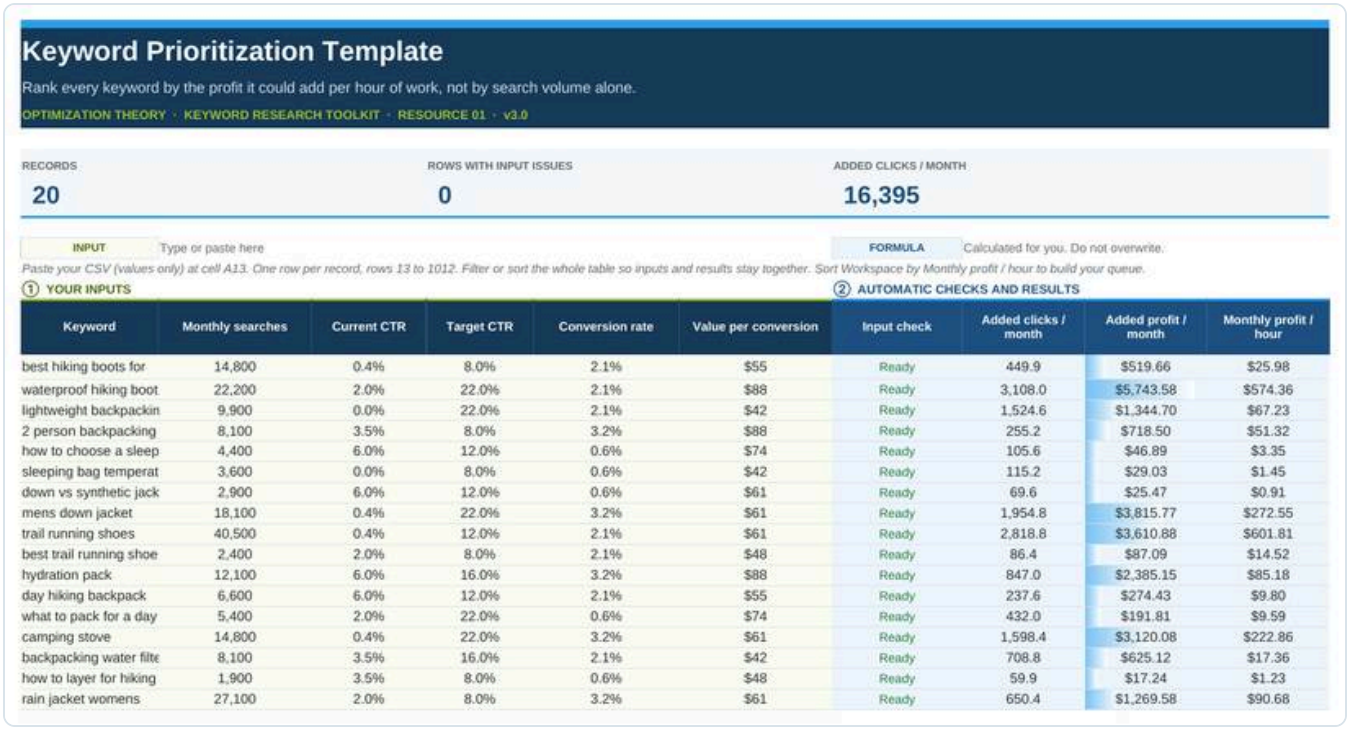
Estimate effort honestly

Add the work hours for each keyword: writing, design, dev and links. Effort is the denominator, so lowball guesses distort the ranking more than anything else.

4

Sort and commit

Sort Workspace by Monthly profit / hour, or read the Top 10 on the Dashboard. Commit to the top of the list and record the source export in Source reference.



Keyword Prioritization Template

Rank every keyword by the profit it could add per hour of work, not by search volume alone.

OPTIMIZATION THEORY · KEYWORD RESEARCH TOOLKIT · RESOURCE 01 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	ADDED CLICKS / MONTH
20	0	16,395

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 1012. Filter or sort the whole table so inputs and results stay together. Sort Workspace by Monthly profit / hour to build your queue.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Keyword	Monthly searches	Current CTR	Target CTR	Conversion rate	Value per conversion	Input check	Added clicks / month	Added profit / month	Monthly profit / hour
best hiking boots for	14,800	0.4%	8.0%	2.1%	$55	Ready	449.9	$519.66	$25.98
waterproof hiking boot	22,200	2.0%	22.0%	2.1%	$88	Ready	3,108.0	$5,743.58	$574.36
lightweight backpackin	9,900	0.0%	22.0%	2.1%	$42	Ready	1,524.6	$1,344.70	$67.23
2 person backpacking	8,100	3.5%	8.0%	3.2%	$88	Ready	255.2	$718.50	$51.32
how to choose a sleep	4,400	6.0%	12.0%	0.6%	$74	Ready	105.6	$46.89	$3.35
sleeping bag temperat	3,600	0.0%	8.0%	0.6%	$42	Ready	115.2	$29.03	$1.45
down vs synthetic jack	2,900	6.0%	12.0%	0.6%	$61	Ready	69.6	$25.47	$0.91
mens down jacket	18,100	0.4%	22.0%	3.2%	$61	Ready	1,954.8	$3,815.77	$272.55
trail running shoes	40,500	0.4%	12.0%	2.1%	$61	Ready	2,818.8	$3,610.88	$601.81
best trail running shoe	2,400	2.0%	8.0%	2.1%	$48	Ready	86.4	$87.09	$14.52
hydration pack	12,100	6.0%	16.0%	3.2%	$88	Ready	847.0	$2,385.15	$85.18
day hiking backpack	6,600	6.0%	12.0%	2.1%	$55	Ready	237.6	$274.43	$9.80
what to pack for a day	5,400	2.0%	22.0%	0.6%	$74	Ready	432.0	$191.81	$9.59
camping stove	14,800	0.4%	22.0%	3.2%	$61	Ready	1,598.4	$3,120.08	$222.86
backpacking water filte	8,100	3.5%	16.0%	2.1%	$42	Ready	708.8	$625.12	$17.36
how to layer for hiking	1,900	3.5%	8.0%	0.6%	$48	Ready	59.9	$17.24	$1.23
rain jacket womens	27,100	2.0%	8.0%	3.2%	$61	Ready	650.4	$1,269.58	$90.68

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Keyword Overview**: search volume, monthly history, difficulty and intent for a list of keywords.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/keyword_overview/live
[
  {
    "keywords": [
      "your keyword 1",
      "your keyword 2"
    ],
    "location_code": 2840,
    "language_code": "en"
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 01 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Keyword, Monthly searches	Current CTR, Target CTR, Conversion rate, Value per conversion, Attainment factor, Work hours

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`keyword`	Keyword	Exact query in the selected country and language.	DataForSEO: keyword
`search_volume`	Monthly searches	Provider monthly search-volume estimate. Use one market, language and source date.	DataForSEO: search_volume
`current_ctr`	Current CTR	Assumed organic click-through rate as a decimal. Calibrate by device, brand and SERP layout. Decimal, 0.08 = 8%.	Your records or manual review
`target_ctr`	Target CTR	Assumed organic click-through rate as a decimal. Calibrate by device, brand and SERP layout. Decimal, 0.08 = 8%.	Your records or manual review
`conversion_rate`	Conversion rate	Conversions divided by eligible organic sessions for the same segment. This is an assumption. Decimal, 0.08 = 8%.	Your records or manual review
`value_per_conversion`	Value per conversion	USD contribution profit per conversion or expected lead profit. Use one value basis.	Your records or manual review
`attainment`	Attainment factor	Planning haircut for uncertainty, 0 to 1. This is your assumption, not a probability supplied by the API. Decimal, 0.08 = 8%.	Your records or manual review
`effort_hours`	Work hours	Estimated implementation hours, greater than zero.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

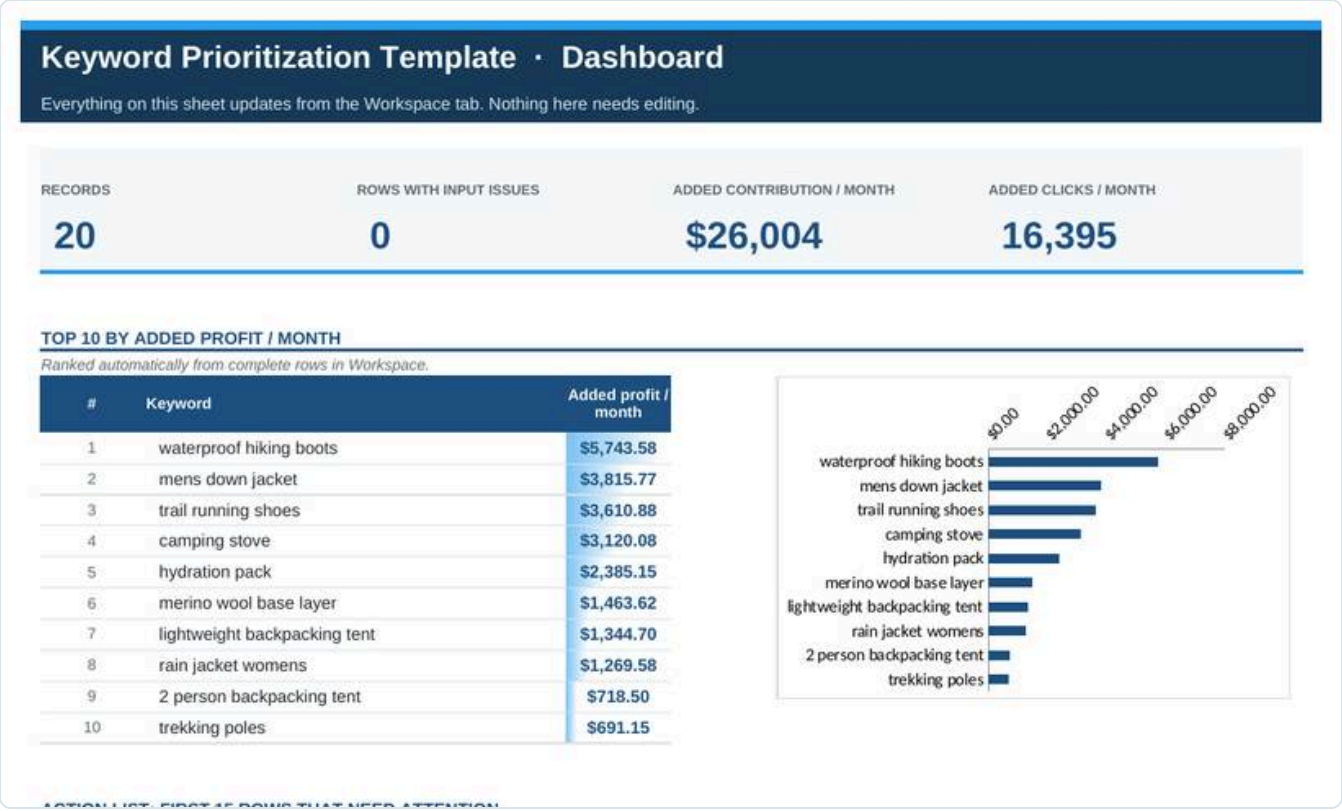
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 20 example rows.

20	0	$26,004	16,395
Records	Rows with input issues	Added contribution / month	Added clicks / month

Trail running shoes tops the per-hour ranking because its fix takes only 6 hours, while waterproof hiking boots adds the most profit in absolute terms. Sorting by both tells you what to do this week and what to plan for the quarter.

Top 10 by added profit / month

#	Keyword	Added profit / month
1	waterproof hiking boots	$5,743.58
2	mens down jacket	$3,815.77
3	trail running shoes	$3,610.88
4	camping stove	$3,120.08
5	hydration pack	$2,385.15



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Compare opportunities on a consistent value basis. A high result can come from an optimistic assumption, so inspect the drivers.

Limits. Keyword difficulty is context, not a calibrated probability. Deduplicate overlapping keyword clusters before summing forecasts.

Mistakes to avoid

Using a generic CTR curve as your current CTR. Your current CTR is a fact you can measure in Search Console. Use it. Save the curve for the target CTR, where you're modeling a position you don't hold yet.

Setting attainment to 1. An attainment of 1 assumes you'll capture the entire modeled gain. Almost nobody does. Values between 0.4 and 0.7 keep forecasts honest and protect your credibility when results come in.

Treating revenue as profit. Value per conversion should be margin or contribution, not order value. Revenue makes every ecommerce keyword look three times better than it is.

Ignoring effort. Two keywords with equal profit are not equal if one takes 6 hours and the other takes 40. The per-hour metric is what turns a wish list into a plan.

Tips from the field

Group near-duplicate keywords first with the SERP overlap template, so you don't count the same page's traffic twice.

Re-run the sheet each quarter with fresh Search Console CTRs. Keywords that moved will drop down the list on their own.

Add a column for the target URL and feed the winners straight into the keyword mapping template.

Questions people ask

What is a keyword prioritization template?

It's a spreadsheet that scores each keyword by its likely business value so you can decide what to work on first. This one scores by added profit per work hour, using search volume, CTR gap, conversion rate, value per conversion, an attainment factor and effort.

How do I prioritize keywords for SEO?

Estimate the extra clicks a better ranking would bring, convert them into profit with your conversion rate and margin, then divide by the effort required. Rank by that number and sanity-check the top of the list for intent and feasibility.

Where do I get the CTR values?

Current CTR comes from Google Search Console (clicks ÷ impressions for the query). Target CTR should come from your own site's CTR by position, or a published CTR curve if you don't have enough data.

Does this work in Google Sheets?

Yes. Upload the XLSX to Google Drive and open it with Google Sheets. All formulas use functions that work in Excel, Google Sheets and LibreOffice.

Is keyword difficulty included?

Not as a score. Difficulty is captured more honestly through the target CTR you choose, the attainment factor and the hours you estimate. A hard keyword should carry a lower target, lower attainment and more hours.

Templates that work well with this one

Keyword Mapping Template

Assign every keyword to exactly one URL and catch conflicting assignments before they become cannibalization.

SERP Overlap Keyword Clustering Template

Decide whether two keywords belong on one page or two by measuring how much their Google results overlap.

Keyword Gap Analysis Template

Find the queries your competitors rank for that you don't, and size each gap in potential clicks.

SEO Forecast Template

Project added clicks and contribution per keyword cluster with CTR, attainment and seasonality you can defend.

Ecommerce SEO Prioritization Template

Rank product pages by potential orders, unit contribution and profit per hour, and catch out-of-stock or noindex SKUs.

SEO Roadmap Template

Sequence 90 days of SEO and GEO work by weighted opportunity per hour, dependencies and acceptance criteria.

Read the full tutorial online: **optimizationtheory.com/download-view/keyword-prioritization-template/**
Get all six templates in the **Keyword Research Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

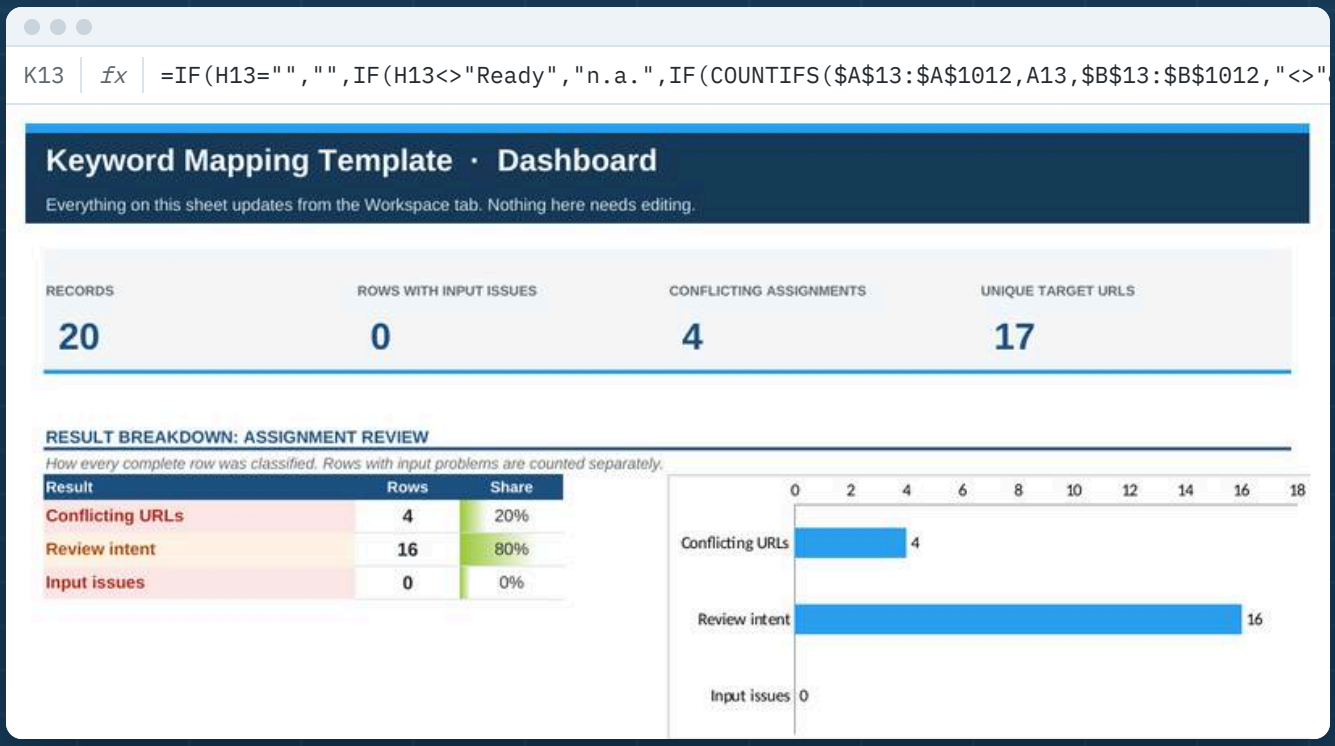
OptimizationTheory.com

Keyword Research Toolkit, resource 02

Keyword Mapping Template

Assign every keyword to exactly one URL and catch conflicting assignments before they become cannibalization.

Built for the DataForSEO API: Labs: Ranked Keywords



Jourdan Rombough, optimizationtheory.com

What this template decides

Which single URL should own each keyword, and where your map assigns the same query to two different pages.

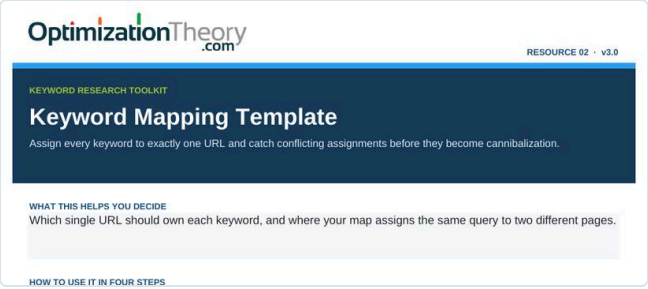
A keyword map is the contract between your keyword research and your site architecture. It says, for every query you care about, which one page is responsible for ranking. When that contract is missing, two writers target the same query, a category page and a blog post compete, and Google picks whichever it likes on a given day.

This keyword mapping template keeps the map in one table: keyword, target URL, cluster, intent, volume and owner. Formulas count how many times each keyword appears, how many keywords each URL carries, and flag any keyword assigned to more than one URL as Conflicting URLs. The Dashboard lists every conflict so you can resolve them before they show up in Search Console.

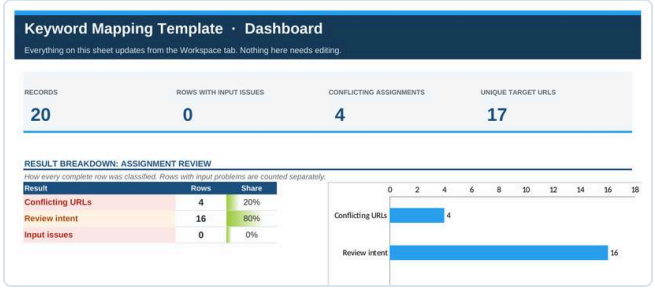
Who it's for

- SEOs building or cleaning up a site's information architecture
- Content teams that need a single source of truth for who owns which topic
- Migrations, where every keyword needs a destination on the new site
- Agencies handing a clear page-by-page plan to a client

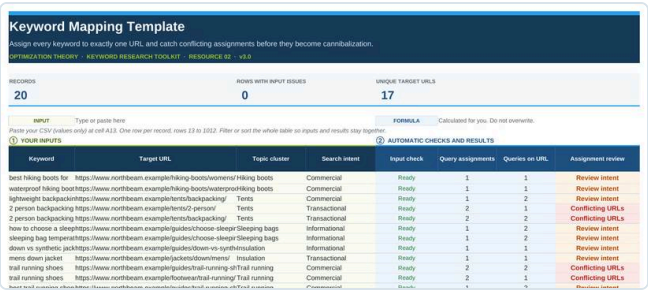
What's in the workbook



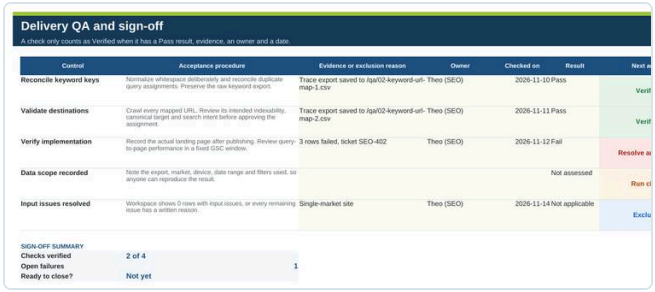
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 1,000 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Query assignments counts how many rows share the same keyword. Queries on URL counts how many keywords point at the same URL, which helps you spot overloaded pages. Assignment review returns Conflicting URLs whenever the same keyword is mapped to a different URL anywhere in the table, otherwise Review intent as a reminder to check the match.

The key formula, as written in the workbook

```
=IF(H13="","",IF(H13<>"Ready","n.a.",IF(COUNTIFS($A$13:$A$1012,A13,$B$13:$B$1012,"<>"&B13)>0,"Confli
cting URLs","Review intent")))
```

Result column	Plain-English formula	What it tells you
Query assignments	COUNTIFS(all Keyword,Keyword)	Number of rows assigning this exact keyword.
Queries on URL	COUNTIFS(all Target URL,Target URL)	Number of keyword rows assigned to this URL. Several supporting queries can be intentional.
Assignment review	IF(COUNTIFS(all Keyword,Keyword,all Target URL," ≠ "&Target URL)>0,"Conflicting URLs","Review intent")	Flags the same exact keyword assigned to different URLs.

The results you'll see

Conflicting URLs Review intent

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

List your target keywords

Paste keywords with search volume, one per row. Include the ones you already rank for, not just new targets.

2

Assign one target URL each

Choose the existing or planned URL that best matches the intent. Use the cluster column to group keywords that belong on the same page.

3

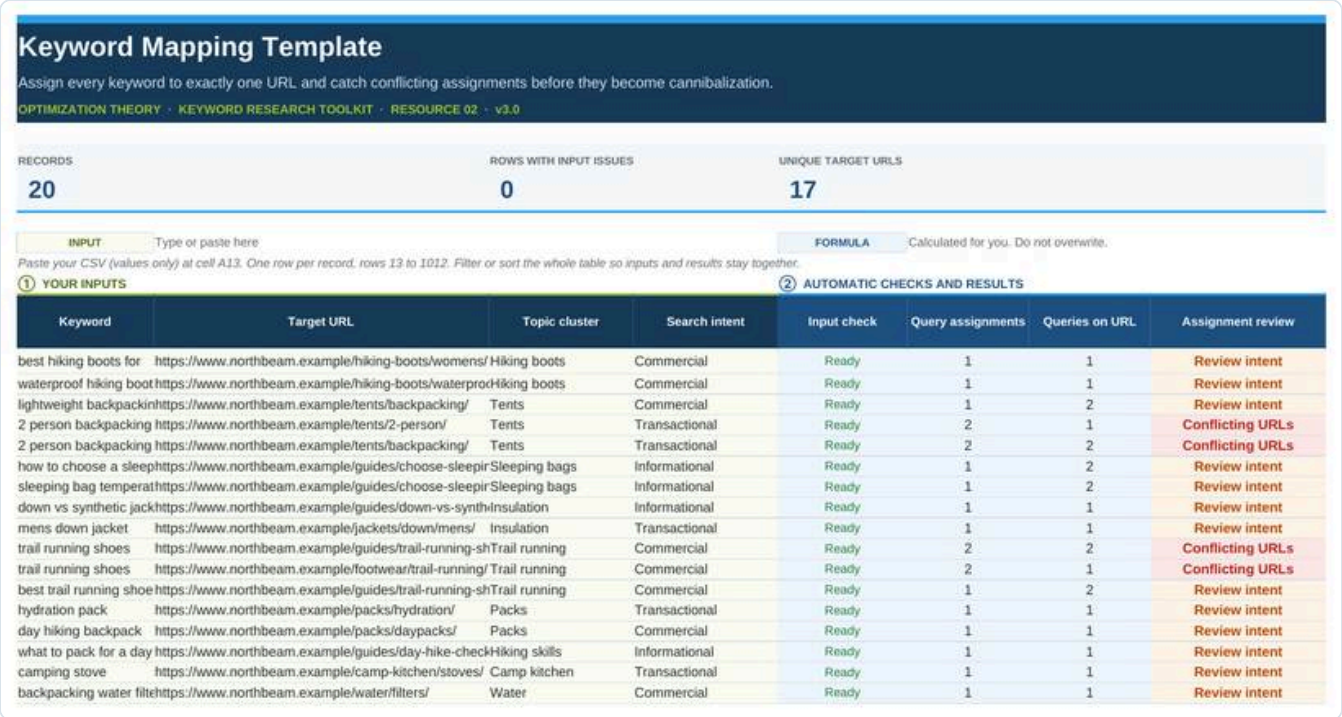
Label intent and owner

Pick an intent from the dropdown (informational, commercial, transactional, navigational, local) and name the person responsible for that page.

4

Resolve every conflict

Open the Dashboard action list. Each row is a keyword mapped to more than one URL. Pick one owner page and plan internal links or consolidation for the other.



Keyword Mapping Template

Assign every keyword to exactly one URL and catch conflicting assignments before they become cannibalization.

OPTIMIZATION THEORY · KEYWORD RESEARCH TOOLKIT · RESOURCE 02 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	UNIQUE TARGET URLS
20	0	17

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 1012. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Keyword	Target URL	Topic cluster	Search intent	Input check	Query assignments	Queries on URL	Assignment review
best hiking boots for	https://www.northbeam.example/hiking-boots/womens/	Hiking boots	Commercial	Ready	1	1	Review intent
waterproof hiking boot	https://www.northbeam.example/hiking-boots/waterpro	Hiking boots	Commercial	Ready	1	1	Review intent
lightweight backpackin	https://www.northbeam.example/tents/backpacking/	Tents	Commercial	Ready	1	2	Review intent
2 person backpacking	https://www.northbeam.example/tents/2-person/	Tents	Transactional	Ready	2	1	Conflicting URLs
2 person backpacking	https://www.northbeam.example/tents/backpacking/	Tents	Transactional	Ready	2	2	Conflicting URLs
how to choose a sleep	https://www.northbeam.example/guides/choose-sleepir	Sleeping bags	Informational	Ready	1	2	Review intent
sleeping bag temperat	https://www.northbeam.example/guides/choose-sleepir	Sleeping bags	Informational	Ready	1	2	Review intent
down vs synthetic jack	https://www.northbeam.example/guides/down-vs-synth	Insulation	Informational	Ready	1	1	Review intent
mens down jacket	https://www.northbeam.example/jackets/down/mens/	Insulation	Transactional	Ready	1	1	Review intent
trail running shoes	https://www.northbeam.example/guides/trail-running-sh	Trail running	Commercial	Ready	2	2	Conflicting URLs
trail running shoes	https://www.northbeam.example/footwear/trail-running/	Trail running	Commercial	Ready	2	1	Conflicting URLs
best trail running shoe	https://www.northbeam.example/guides/trail-running-sh	Trail running	Commercial	Ready	1	2	Review intent
hydration pack	https://www.northbeam.example/packs/hydration/	Packs	Transactional	Ready	1	1	Review intent
day hiking backpack	https://www.northbeam.example/packs/daypacks/	Packs	Commercial	Ready	1	1	Review intent
what to pack for a day	https://www.northbeam.example/guides/day-hike-check	Hiking skills	Informational	Ready	1	1	Review intent
camping stove	https://www.northbeam.example/camp-kitchen/stoves/	Camp kitchen	Transactional	Ready	1	1	Review intent
backpacking water filt	https://www.northbeam.example/water/filters/	Water	Commercial	Ready	1	1	Review intent

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Ranked Keywords**: every keyword a domain ranks for, with its ranking URL, position and volume.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/ranked_keywords/live
[
  {
    "target": "yourdomain.com",
    "location_code": 2840,
    "language_code": "en",
    "limit": 1000
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 02 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Keyword, Target URL, Search intent, Monthly searches	Topic cluster, Owner

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`keyword`	Keyword	Exact query in the selected country and language.	DataForSEO: keyword
`target_url`	Target URL	The intended canonical landing page.	DataForSEO: url
`cluster`	Topic cluster	Human-approved group based on intent and SERP review.	Your records or manual review
`intent`	Search intent	Informational, commercial, navigational or transactional.	DataForSEO: intent
`search_volume`	Monthly searches	Provider monthly search-volume estimate. Use one market, language and source date.	DataForSEO: search_volume
`owner`	Owner	Person accountable for the next action.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

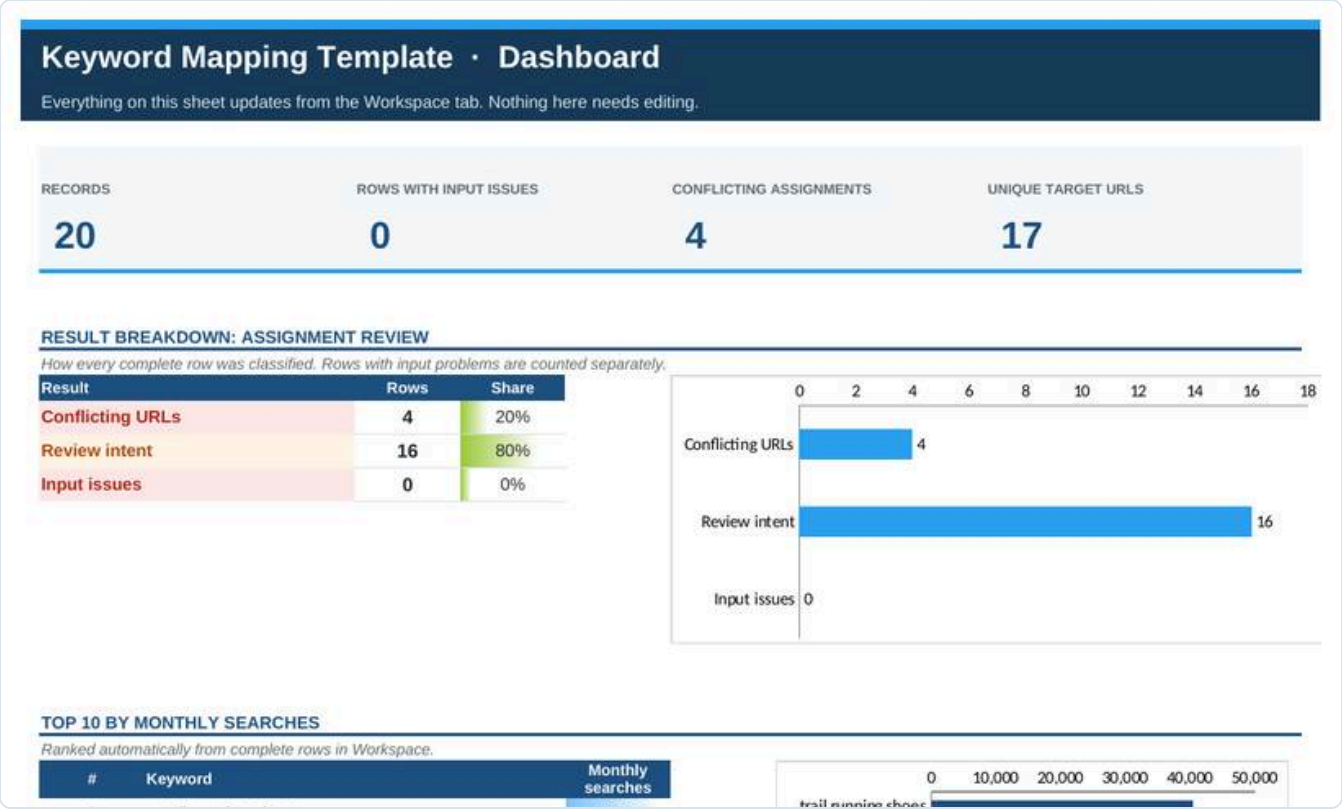
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 20 example rows.

20	0	4	17
Records	Rows with input issues	Conflicting assignments	Unique target URLs

Two keywords in the example were mapped twice by different people, which is exactly how cannibalization starts in real teams. The conflicts surface on the Dashboard immediately.

Top 10 by monthly searches

#	Keyword	Monthly searches
1	trail running shoes	40,500
2	trail running shoes	40,500
3	rain jacket womens	27,100
4	waterproof hiking boots	22,200
5	mens down jacket	18,100



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Multiple queries on one page are normal when they share intent. Multiple destinations for the same query deserve a review.

Limits. This catches mapping conflicts, not ranking cannibalization. Use resource 22 for measured page competition.

Mistakes to avoid

Mapping by keyword instead of by intent. Two keywords with the same SERP belong on the same page even if the words differ. Cluster first, then map the cluster.

Overloading one URL. If Queries on URL climbs into the dozens for a single page, it's usually covering several intents. Consider splitting it.

Leaving planned pages blank. Give planned pages a URL now, even if it's a placeholder. Blank targets hide gaps in your plan.

Tips from the field

Use the SERP overlap template to decide which keywords share a page before you map.

Export the map as CSV and join it to Search Console data to see which pages rank for queries mapped elsewhere.

Revisit the map after every content audit, since merged and retired URLs change ownership.

Questions people ask

What is keyword mapping in SEO?

Keyword mapping is assigning each target keyword, or keyword cluster, to the one page on your site that should rank for it. It prevents internal competition and shows where new pages are needed.

How many keywords should map to one page?

As many as share the same search intent and SERP. A page commonly owns one primary keyword and a handful to a few dozen close variants.

How does the template detect conflicts?

It counts rows where the same keyword is assigned to a different URL. Any keyword with more than one target URL is flagged as Conflicting URLs.

Can I use this for a site migration?

Yes. Map keywords to the new URLs, then use the redirect mapping template to make sure every old URL that ranked for those keywords points at the right destination.

Templates that work well with this one

SERP Overlap Keyword Clustering Template

Decide whether two keywords belong on one page or two by measuring how much their Google results overlap.

Keyword Prioritization Template

Rank every keyword by the profit it could add per hour of work, not by search volume alone.

Keyword Cannibalization Checker Template

Find queries splitting clicks across two URLs, check whether intent really overlaps and decide whether to consolidate.

Site Migration URL Inventory Template

Inventory every legacy URL with its traffic, profit and links, assign a destination and catch risky retirements.

Content Audit Template

Score every URL by lost clicks, conversions and links, choose keep, refresh, merge or retire, and catch the risky calls.

Internal Linking Opportunity Template

Score each source-to-target internal link by expected visits and contribution per hour, then verify it went live.

Read the full tutorial online: **optimizationtheory.com/download-view/keyword-mapping-template/**
Get all six templates in the **Keyword Research Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

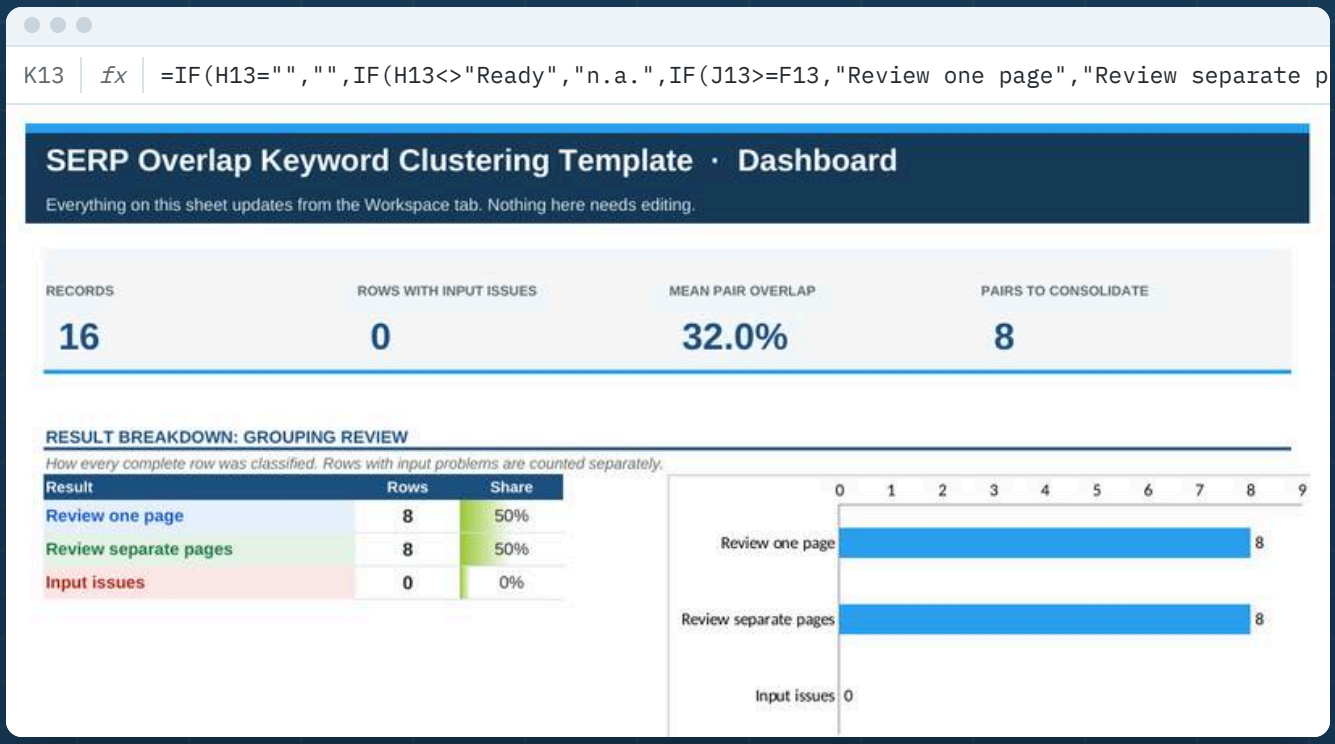
OptimizationTheory.com

Keyword Research Toolkit, resource 03

SERP Overlap Keyword Clustering Template

Decide whether two keywords belong on one page or two by measuring how much their Google results overlap.

Built for the DataForSEO API: SERP API: Google Organic



Jourdan Rombough, optimizationtheory.com

What this template decides

Whether two queries should be targeted by one page or separate pages, based on how many ranking URLs their SERPs share.

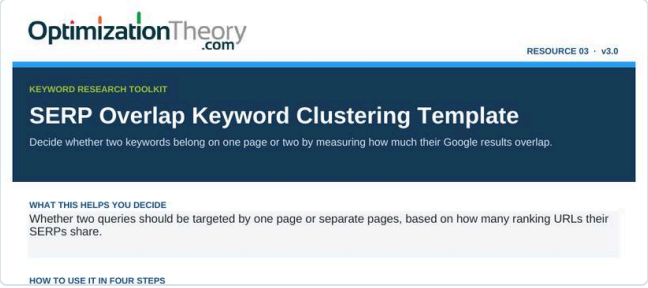
Language models and keyword tools are good at grouping words that look alike. Google doesn't rank pages by how alike the words look; it ranks them by what searchers want. The fastest reliable signal of shared intent is the SERP itself: if the same URLs rank for both queries, Google is treating them as the same need.

This keyword clustering template measures that overlap for each pair of queries. Enter how many URLs you compared for each query and how many appear in both, and it calculates the Jaccard overlap (shared URLs ÷ all unique URLs). Pairs above your cutoff are flagged Review one page; pairs below it, Review separate pages.

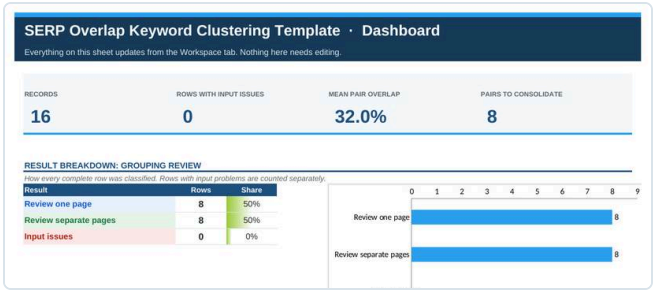
Who it's for

- SEOs clustering a large keyword list into page-level targets
- Writers asking whether a variant needs its own article
- Teams diagnosing cannibalization
- Anyone checking an AI-generated keyword cluster against real SERPs

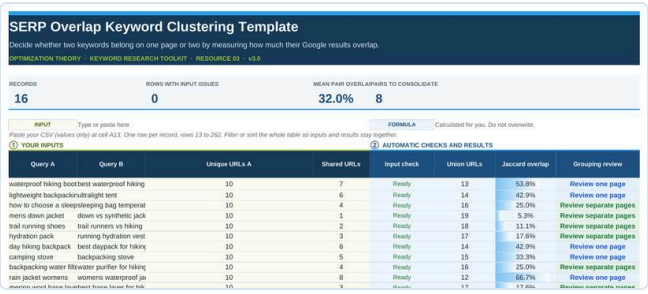
What's in the workbook



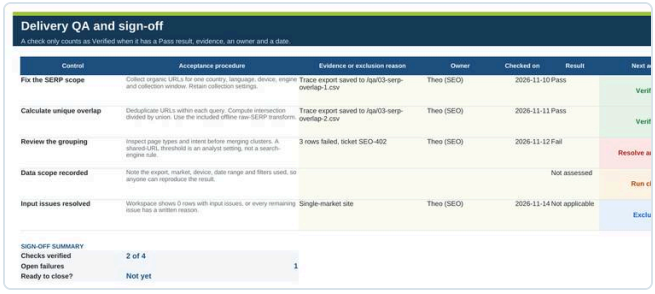
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Union URLs = URLs for A + URLs for B – shared URLs. Jaccard overlap = shared ÷ union. With 10 results each, 3 shared URLs gives 3 ÷ 17 = 0.18, while 7 shared gives 7 ÷ 13 = 0.54. The cutoff is editable per row so you can be stricter for money pages and looser for blog content.

The key formula, as written in the workbook

```
=IF(H13="","",IF(H13<>"Ready","n.a.",IF(J13>=F13,"Review one page","Review separate pages")))
```

Result column	Plain-English formula	What it tells you
Union URLs	Unique URLs A+Unique URLs B-Shared URLs	Unique URLs across both sets.
Jaccard overlap	Shared URLs ÷ Union URLs	Shared URLs divided by union URLs.
Grouping review	IF(Jaccard overlap ≥ Review cutoff,"Review one page","Review separate pages")	Suggestion for human intent review.

The results you'll see

Review one page Review separate pages

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Pick query pairs to test

Start with the pairs you're unsure about: close variants, singular vs plural, 'best X' vs 'X'.

2

Pull the top results

Collect the top 10 organic URLs for each query from the same location, language and device on the same day.

3

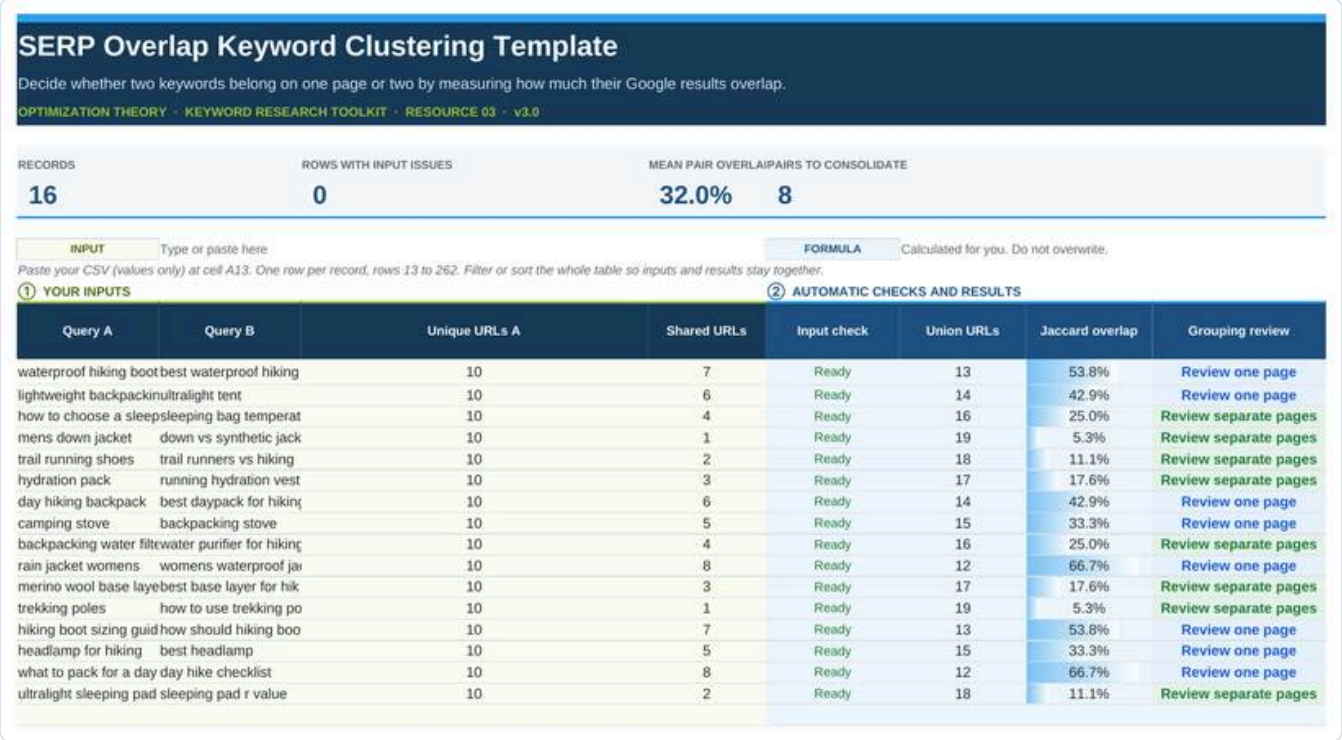
Count shared URLs

Enter the number of URLs compared for each query and how many appear in both lists. Keep the review cutoff at 0.3 unless your niche calls for stricter grouping.

4

Group and map

Pairs marked Review one page go into the same cluster in your keyword map. Pairs marked Review separate pages get their own target URL.



SERP Overlap Keyword Clustering Template

Decide whether two keywords belong on one page or two by measuring how much their Google results overlap.

OPTIMIZATION THEORY · KEYWORD RESEARCH TOOLKIT · RESOURCE 03 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	MEAN PAIR OVERLAP	PAIRS TO CONSOLIDATE
16	0	32.0%	8

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Query A	Query B	Unique URLs A	Shared URLs	Input check	Union URLs	Jaccard overlap	Grouping review
waterproof hiking boot	best waterproof hiking	10	7	Ready	13	53.8%	Review one page
lightweight backpackin	ultralight tent	10	6	Ready	14	42.9%	Review one page
how to choose a sleep	sleeping bag temperat	10	4	Ready	16	25.0%	Review separate pages
mens down jacket	down vs synthetic jack	10	1	Ready	19	5.3%	Review separate pages
trail running shoes	trail runners vs hiking	10	2	Ready	18	11.1%	Review separate pages
hydration pack	running hydration vest	10	3	Ready	17	17.6%	Review separate pages
day hiking backpack	best daypack for hiking	10	6	Ready	14	42.9%	Review one page
camping stove	backpacking stove	10	5	Ready	15	33.3%	Review one page
backpacking water filte	water purifier for hiking	10	4	Ready	16	25.0%	Review separate pages
rain jacket womens	womens waterproof ja	10	8	Ready	12	66.7%	Review one page
merino wool base laye	best base layer for hik	10	3	Ready	17	17.6%	Review separate pages
trekking poles	how to use trekking po	10	1	Ready	19	5.3%	Review separate pages
hiking boot sizing guid	how should hiking boo	10	7	Ready	13	53.8%	Review one page
headlamp for hiking	best headlamp	10	5	Ready	15	33.3%	Review one page
what to pack for a day	day hike checklist	10	8	Ready	12	66.7%	Review one page
ultralight sleeping pad	sleeping pad r value	10	2	Ready	18	11.1%	Review separate pages

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO SERP API: Google Organic**: the top organic results for a query.

A helper command builds the input rows from saved API responses. The overlap command compares every pair of saved SERPs from the same location, language and device and fills all six columns for you.

1. Request the data

```
POST https://api.dataforseo.com/v3/serp/google/organic/live/advanced
[
  {
    "keyword": "your keyword",
    "location_code": 2840,
    "language_code": "en",
    "device": "desktop",
    "depth": 10
  }
]
```

Send one task per query with identical location, language and device, and save each response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py overlap --input serp-*.json --output my-inputs.csv --depth 1
0 --cutoff 0.3
```

Fills automatically	You add
Query A, Query B, Unique URLs A, Unique URLs B, Shared URLs, Review cutoff	Nothing

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`query_a`	Query A	First query in a matched market and device.	Your records or manual review
`query_b`	Query B	Second query in the same market and device.	Your records or manual review
`urls_a`	Unique URLs A	Distinct organic URLs in the selected depth for query A.	Your records or manual review
`urls_b`	Unique URLs B	Distinct organic URLs at the same depth for query B.	Your records or manual review
`shared_urls`	Shared URLs	Distinct intersection of the two organic URL sets.	Your records or manual review
`review_cutoff`	Review cutoff	Analyst-selected Jaccard cutoff for grouping review. This is not a search-engine threshold. Decimal, 0.08 = 8%.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

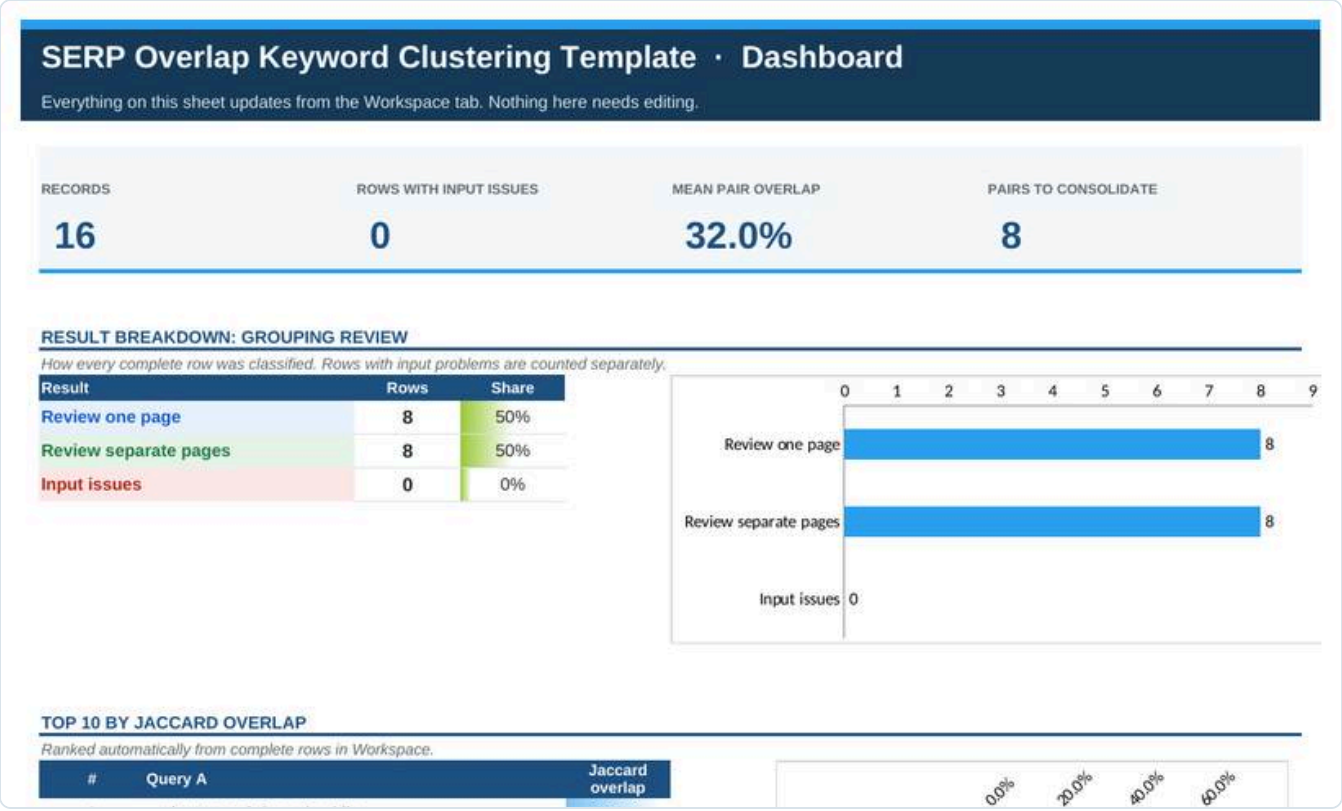
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 16 example rows.

16	0	32.0%	8
Records	Rows with input issues	Mean pair overlap	Pairs to consolidate

In the example, the boot sizing pair and the rain jacket pair overlap heavily and belong on one page each, while 'trekking poles' and 'how to use trekking poles' share almost nothing: a product page and a how-to guide.

Top 10 by jaccard overlap

#	Query A	Jaccard overlap
1	what to pack for a day hike	66.7%
2	rain jacket womens	66.7%
3	hiking boot sizing guide	53.8%
4	waterproof hiking boots	53.8%
5	day hiking backpack	42.9%



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Overlap is supporting evidence for content consolidation. Inspect dominant page types before assigning one URL.

Limits. Pairwise chains can connect dissimilar endpoints. Do not treat connected pairs as an automatically validated cluster.

Mistakes to avoid

Comparing SERPs from different days or locations. SERPs move. Pull both lists at the same time with the same settings or the overlap is noise.

Counting SERP features as URLs. Compare organic URLs only. Videos, shopping and People Also Ask blocks inflate the union and lower the overlap.

Treating 0.3 as a law. The cutoff is a starting point. Check a few borderline pairs by eye and adjust.

Tips from the field

Pull SERPs at scale with the DataForSEO organic endpoint and count overlaps in a script, then paste the counts here.

Re-test clusters for important pages twice a year; intent drifts.

Use the overlap score to settle debates with writers: it's evidence, not opinion.

Questions people ask

What is keyword clustering by SERP similarity?

It groups keywords based on how many of the same URLs rank for them in Google. High overlap means Google sees one intent, so one page should target both.

What overlap means two keywords belong together?

A common rule of thumb is three or more shared URLs in the top 10, roughly a Jaccard score of 0.18 to 0.3. This template defaults to 0.3 for a stricter grouping.

What is Jaccard similarity?

It's the size of the intersection of two sets divided by the size of their union. Here, shared ranking URLs divided by all unique ranking URLs across both queries.

Can I use this with Google Sheets?

Yes, the XLSX opens in Google Sheets and Excel with all formulas working.

Templates that work well with this one

Keyword Mapping Template
Assign every keyword to exactly one URL and catch conflicting assignments before they become cannibalization.

Keyword Cannibalization Checker Template
Find queries splitting clicks across two URLs, check whether intent really overlaps and decide whether to consolidate.

Keyword Prioritization Template
Rank every keyword by the profit it could add per hour of work, not by search volume alone.

Keyword Gap Analysis Template
Find the queries your competitors rank for that you don't, and size each gap in potential clicks.

SEO Content Brief Template
A content brief built for Google and AI answers: real questions, original evidence, sources and a three-step approval workflow.

AI Prompt Research Template
Turn real customer tasks and keywords into a weighted prompt panel for ChatGPT, Perplexity, Gemini and AI Overviews.

Read the full tutorial online: **optimizationtheory.com/download-view/keyword-clustering-template/**
Get all six templates in the **Keyword Research Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

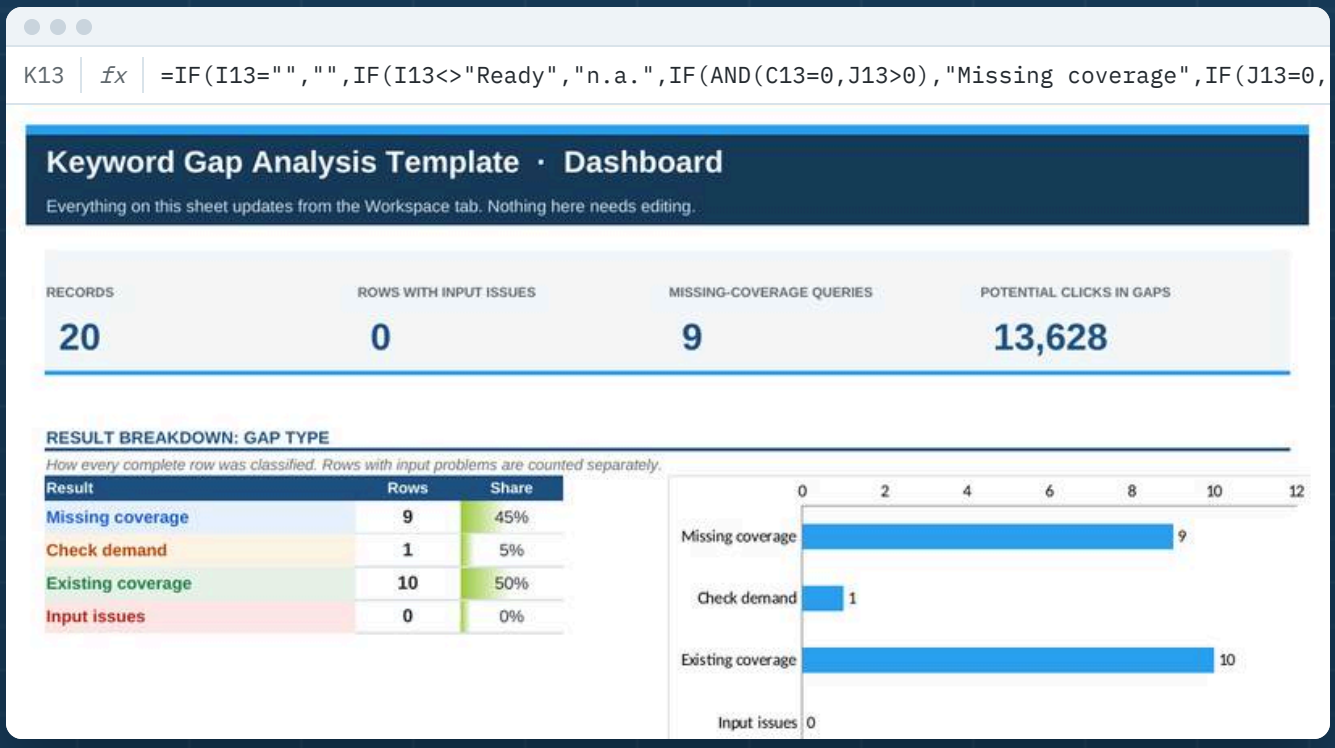
OptimizationTheory.com

Keyword Research Toolkit, resource 04

Keyword Gap Analysis Template

Find the queries your competitors rank for that you don't, and size each gap in potential clicks.

Built for the DataForSEO API: Labs: Ranked Keywords



Jourdan Rombough, optimizationtheory.com

What this template decides

Which competitor-ranked queries you have no coverage for, how big each opportunity is, and which ones need a new page.

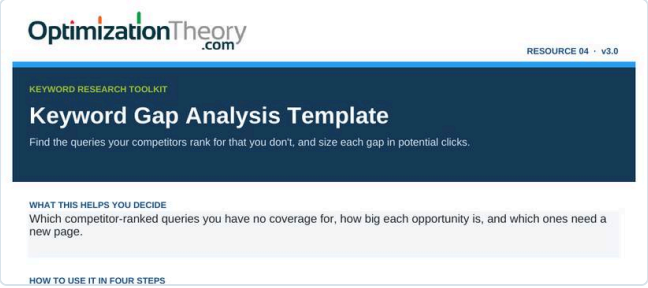
A keyword gap analysis answers a simple question: what are my competitors getting found for that I'm not? The answer is usually a short list of high-intent topics you never built a page for, hiding inside a long list of noise.

This keyword gap analysis template takes each query with your rank and up to two competitors' ranks, then labels it Missing coverage (competitors rank, you don't), Existing coverage (you rank somewhere) or Check demand (nobody in your set ranks, so validate the opportunity first). Each gap is sized as potential monthly clicks at a target CTR, and the Dashboard ranks the biggest gaps.

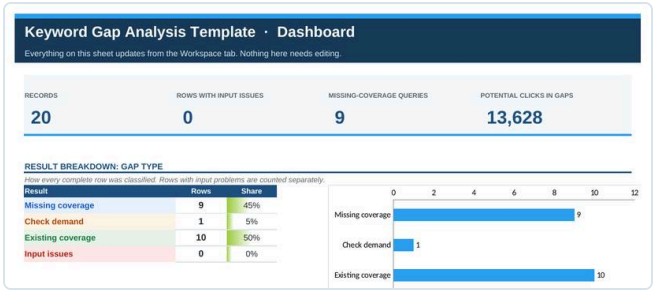
Who it's for

- SEOs planning new content from competitor research
- Ecommerce teams finding missing category and product pages
- Agencies building a pitch around missed opportunities
- Teams entering a new market or product line

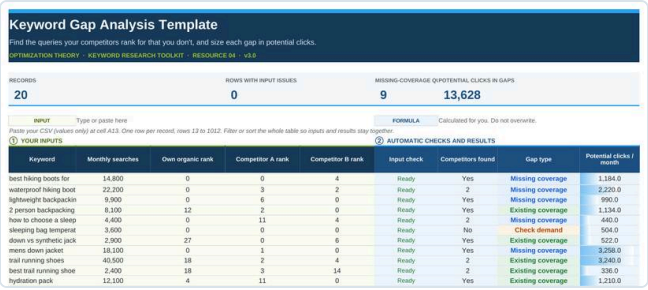
What's in the workbook



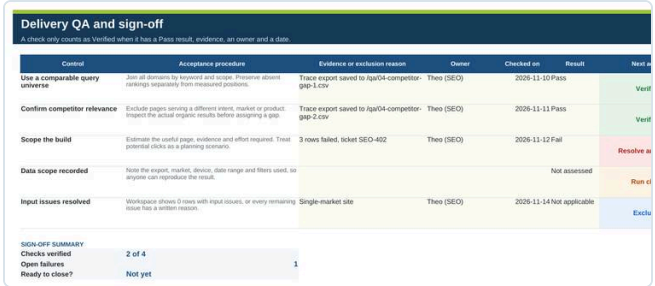
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 1,000 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Competitors found counts how many of the two competitors rank (rank > 0). Gap type is Missing coverage when you don't rank and at least one competitor does, Check demand when neither competitor ranks, and Existing coverage otherwise. Potential clicks = search volume × target CTR.

The key formula, as written in the workbook

```
=IF(I13="","",IF(I13<>"Ready","n.a.",IF(AND(C13=0,J13>0),"Missing coverage",IF(J13=0,"Check demand","Existing coverage"))))
```

Result column	Plain-English formula	What it tells you
Competitors found	IF(Competitor A rank>0,1,0)+IF(Competitor B rank>0,1,0)	Count of the two named competitors found.
Gap type	IF(AND(Own organic rank=0,Competitors found>0),"Missing coverage",IF(Competitors found=0,"Check demand","Existing coverage"))	Classifies observed coverage, not content quality.
Potential clicks / month	Monthly searches × Target CTR	Gross opportunity at the assumed CTR. It is not an incremental forecast.

The results you'll see

Missing coverage | Check demand | Existing coverage

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Pick two real competitors

Choose the sites that actually rank for your money keywords, not your business competitors by name.

2

Export the intersection

Pull keywords where at least one competitor ranks, with search volume, your rank and theirs. Use 0 when a site doesn't rank in the tracked depth.

3

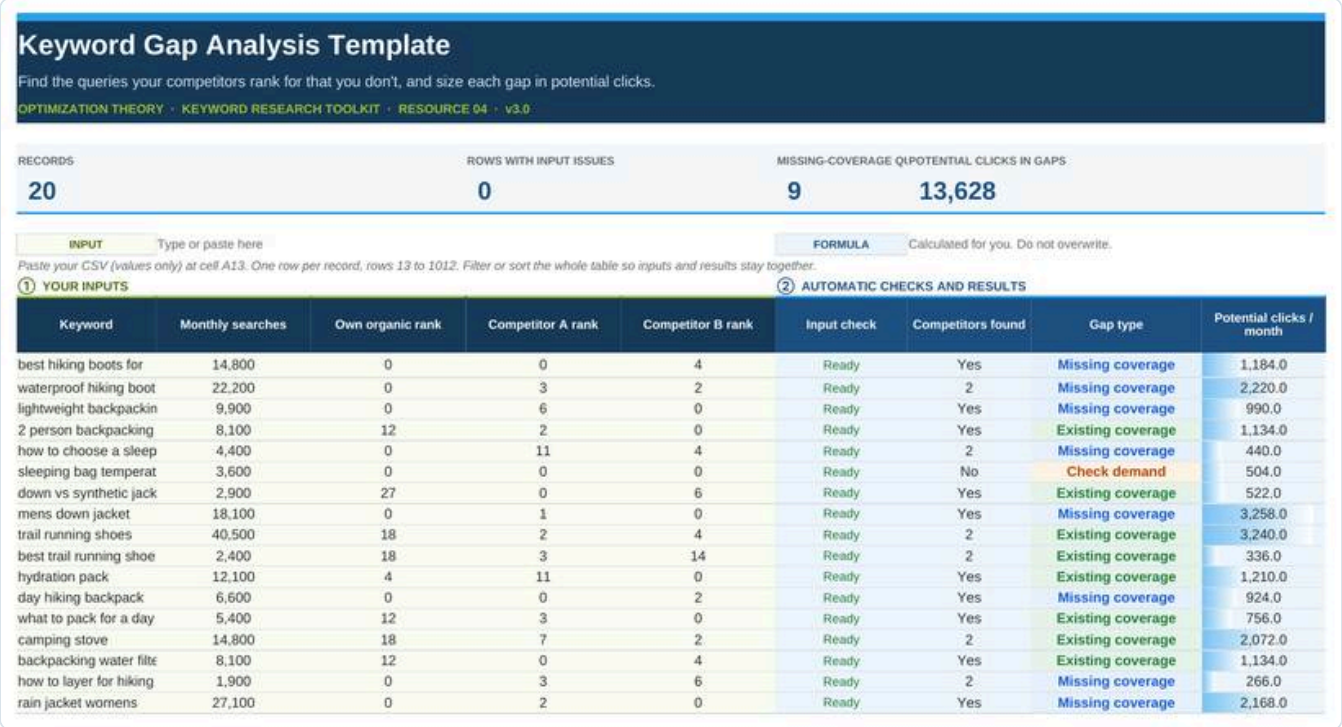
Set a target CTR and effort

Enter the CTR you'd expect at the position you can realistically reach and the hours to build or improve the page.

4

Work the Missing coverage list

Sort by potential clicks. Map each Missing coverage keyword to a planned URL in the keyword mapping template.



Keyword Gap Analysis Template

Find the queries your competitors rank for that you don't, and size each gap in potential clicks.

OPTIMIZATION THEORY · KEYWORD RESEARCH TOOLKIT · RESOURCE 04 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	MISSING-COVERAGE QU	POTENTIAL CLICKS IN GAPS
20	0	9	13,628

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 1012. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Keyword	Monthly searches	Own organic rank	Competitor A rank	Competitor B rank	Input check	Competitors found	Gap type	Potential clicks / month
best hiking boots for	14,800	0	0	4	Ready	Yes	Missing coverage	1,184.0
waterproof hiking boot	22,200	0	3	2	Ready	2	Missing coverage	2,220.0
lightweight backpackin	9,900	0	6	0	Ready	Yes	Missing coverage	990.0
2 person backpacking	8,100	12	2	0	Ready	Yes	Existing coverage	1,134.0
how to choose a sleep	4,400	0	11	4	Ready	2	Missing coverage	440.0
sleeping bag temperat	3,600	0	0	0	Ready	No	Check demand	504.0
down vs synthetic jack	2,900	27	0	6	Ready	Yes	Existing coverage	522.0
mens down jacket	18,100	0	1	0	Ready	Yes	Missing coverage	3,258.0
trail running shoes	40,500	18	2	4	Ready	2	Existing coverage	3,240.0
best trail running shoe	2,400	18	3	14	Ready	2	Existing coverage	336.0
hydration pack	12,100	4	11	0	Ready	Yes	Existing coverage	1,210.0
day hiking backpack	6,600	0	0	2	Ready	Yes	Missing coverage	924.0
what to pack for a day	5,400	12	3	0	Ready	Yes	Existing coverage	756.0
camping stove	14,800	18	7	2	Ready	2	Existing coverage	2,072.0
backpacking water filte	8,100	12	0	4	Ready	Yes	Existing coverage	1,134.0
how to layer for hiking	1,900	0	3	6	Ready	2	Missing coverage	266.0
rain jacket womens	27,100	0	2	0	Ready	Yes	Missing coverage	2,168.0

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Ranked Keywords**: every keyword a domain ranks for, with its ranking URL, position and volume.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/ranked_keywords/live
[
  {
    "target": "yourdomain.com",
    "location_code": 2840,
    "language_code": "en",
    "limit": 1000
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 04 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Keyword, Monthly searches, Own organic rank	Competitor A rank, Competitor B rank, Target CTR, Work hours

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`keyword`	Keyword	Exact query in the selected country and language.	DataForSEO: keyword
`search_volume`	Monthly searches	Provider monthly search-volume estimate. Use one market, language and source date.	DataForSEO: search_volume
`own_rank`	Own organic rank	Organic rank in the selected depth. Use 0 only for confirmed not found.	DataForSEO: rank
`competitor_a_rank`	Competitor A rank	Best organic rank for named competitor A. Zero means not found.	Your records or manual review
`competitor_b_rank`	Competitor B rank	Best organic rank for named competitor B. Zero means not found.	Your records or manual review
`target_ctr`	Target CTR	Assumed organic click-through rate as a decimal. Calibrate by device, brand and SERP layout. Decimal, 0.08 = 8%.	Your records or manual review
`effort_hours`	Work hours	Estimated implementation hours, greater than zero.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

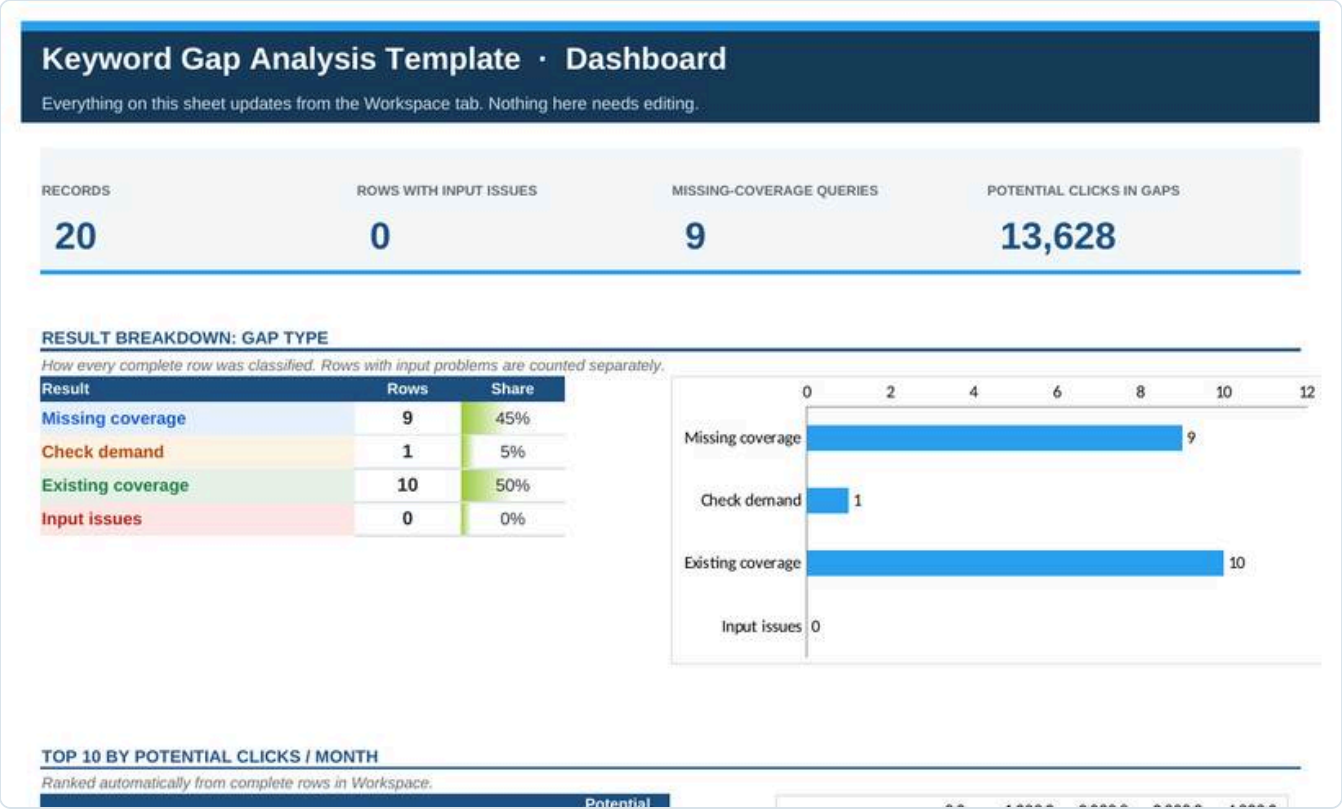
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 20 example rows.

20	0	9	13,628
Records	Rows with input issues	Missing-coverage queries	Potential clicks in gaps

Nine of the 20 example keywords are true gaps, worth about 13,600 potential clicks a month combined. One more is flagged Check demand because neither competitor ranks for it either.

Top 10 by potential clicks / month

#	Keyword	Potential clicks / month
1	mens down jacket	3,258.0
2	trail running shoes	3,240.0
3	waterproof hiking boots	2,220.0
4	trekking poles	2,178.0
5	rain jacket womens	2,168.0



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Existing coverage may need an update instead of another URL. Gross potential does not deduct current traffic.

Limits. The starter importer fills one domain at a time. Peer joins and absence confirmation require a deliberate merge.

Mistakes to avoid

Choosing competitors by brand, not by SERP. Your biggest business rival might not rank for anything you care about. Pick domains that share your SERPs.

Ignoring Existing coverage. Keywords where you rank 18th aren't gaps, but they're often the cheapest wins. Feed them into the prioritization template.

Building a page for every gap. Cluster gap keywords first. Ten gaps often collapse into three pages.

Tips from the field

DataForSEO Labs' domain intersection endpoint returns exactly this table. The included automation script converts the JSON to the input CSV.

Add a third competitor by copying the workbook and running it twice; keep the comparison set stable over time.

Re-run quarterly to catch new gaps as competitors publish.

Questions people ask

What is keyword gap analysis?

It's comparing the keywords your competitors rank for with the ones you rank for, to find topics where they're visible and you're not.

How do I find competitor keywords for free?

Search Console shows your own queries, and you can check competitor rankings manually for a short list. For scale, use a keyword tool or the DataForSEO API and paste the export into this template.

What's the difference between a keyword gap and a content gap?

A keyword gap is a query you don't rank for. A content gap is the missing page or section behind it. This template finds the first so you can plan the second.

Why does it say Check demand?

Neither competitor ranks in the tracked depth, so the query may have low commercial value or an intent nobody serves well. Validate before you build.

Templates that work well with this one

Keyword Prioritization Template
Rank every keyword by the profit it could add per hour of work, not by search volume alone.

Keyword Mapping Template
Assign every keyword to exactly one URL and catch conflicting assignments before they become cannibalization.

SERP Overlap Keyword Clustering Template
Decide whether two keywords belong on one page or two by measuring how much their Google results overlap.

SEO Forecast Template
Project added clicks and contribution per keyword cluster with CTR, attainment and seasonality you can defend.

AI Share of Voice Calculator
Compare citation rate and share across competitor domains inside one fixed set of AI answers.

Ecommerce SEO Prioritization Template
Rank product pages by potential orders, unit contribution and profit per hour, and catch out-of-stock or noindex SKUs.

Read the full tutorial online: **optimizationtheory.com/download-view/keyword-gap-analysis-template/**
Get all six templates in the **Keyword Research Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

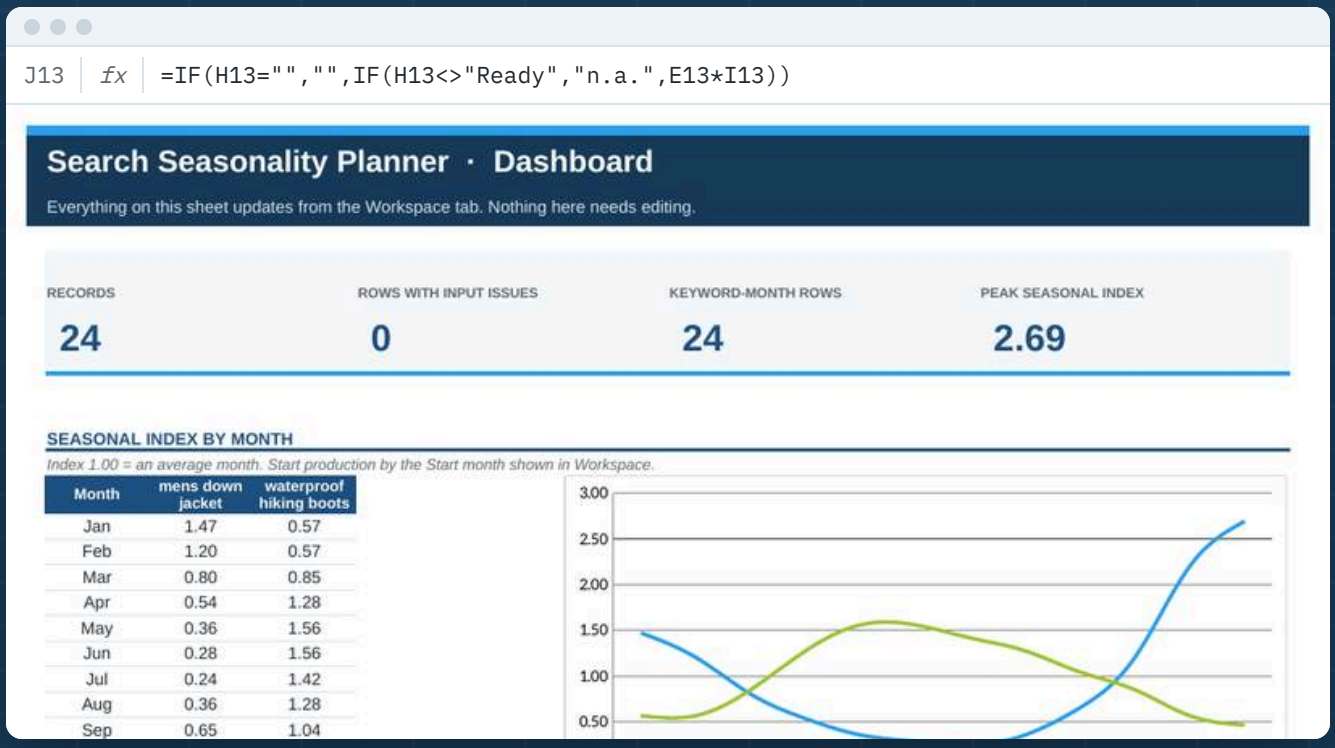
OptimizationTheory.com

Keyword Research Toolkit, resource 05

Search Seasonality Planner

Turn monthly search volume into a seasonal index, season-adjusted click targets and a publish-by month.

Built for the DataForSEO API: Labs: Keyword Overview



J13 | *fx* | =IF(H13="","",IF(H13<>"Ready","n.a.",E13*I13))

Search Seasonality Planner · Dashboard

Everything on this sheet updates from the Workspace tab. Nothing here needs editing.

RECORDS	ROWS WITH INPUT ISSUES	KEYWORD-MONTH ROWS	PEAK SEASONAL INDEX
24	0	24	2.69

SEASONAL INDEX BY MONTH

Index 1.00 = an average month. Start production by the Start month shown in Workspace.

Month	mens down jacket	waterproof hiking boots
Jan	1.47	0.57
Feb	1.20	0.57
Mar	0.80	0.85
Apr	0.54	1.28
May	0.36	1.56
Jun	0.28	1.56
Jul	0.24	1.42
Aug	0.36	1.28
Sep	0.65	1.04

Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

When demand for each keyword peaks, how much to scale traffic expectations month by month, and when to start production so content is ranking before the peak.

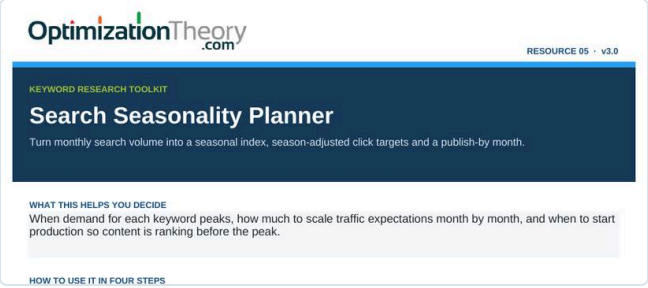
Seasonal keywords punish late publishing. A ski jacket guide published in November catches the tail of the season; the same guide published in August has time to get crawled, indexed and climb before demand arrives. Yet most content calendars plan around the month a topic is popular, not the months before it.

This seasonal keyword planner calculates a seasonal index for every keyword-month (that month's searches ÷ the monthly average), scales your baseline clicks by it, and works backwards from each month by your lead time to show the month production should start. The Dashboard charts the index so you can see each keyword's season at a glance.

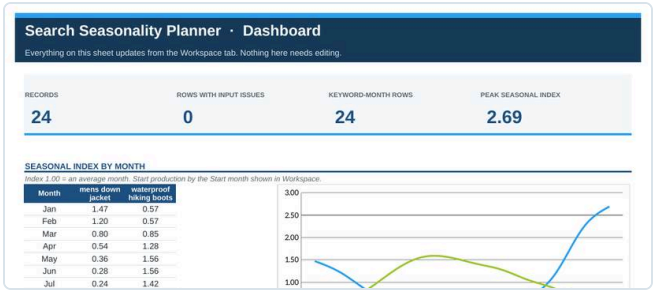
Who it's for

- Ecommerce and retail SEOs with seasonal catalogs
- Travel, events, education and tax-season businesses
- Content leads building an annual calendar
- Analysts explaining why traffic 'dropped' in a predictable month

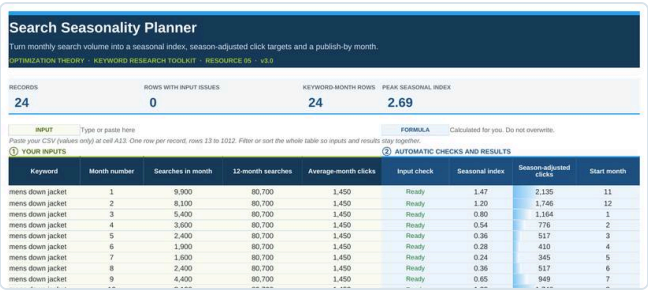
What's in the workbook



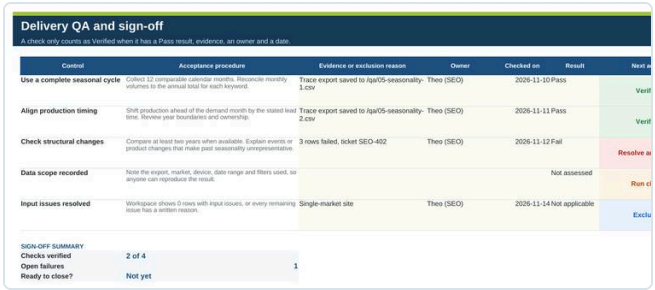
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 1,000 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Seasonal index = monthly searches ÷ (annual total ÷ 12). An index of 1.80 means that month runs 80% above average. Season-adjusted clicks = baseline clicks × index. Start month = the peak month minus your lead months, wrapped around the calendar.

The key formula, as written in the workbook

```
=IF(H13="","",IF(H13<>"Ready","n.a.",E13*I13))
```

Result column	Plain-English formula	What it tells you
Seasonal index	Searches in month ÷ (12-month searches ÷ 12)	Month searches divided by the 12-month average.
Season-adjusted clicks	Average-month clicks × Seasonal index	Average-month clicks multiplied by seasonal index.
Start month	MOD(Month number-Production lead months-1,12)+1	Calendar month to start production, wrapping to the previous year when required.

How to use it, step by step

1

Pull 12 months of volume

Export monthly search volume for each keyword. Use a full year so the annual total is complete.

2

Enter one row per keyword-month

Each row is one keyword in one month (1 to 12), with that month's searches and the 12-month total.

3

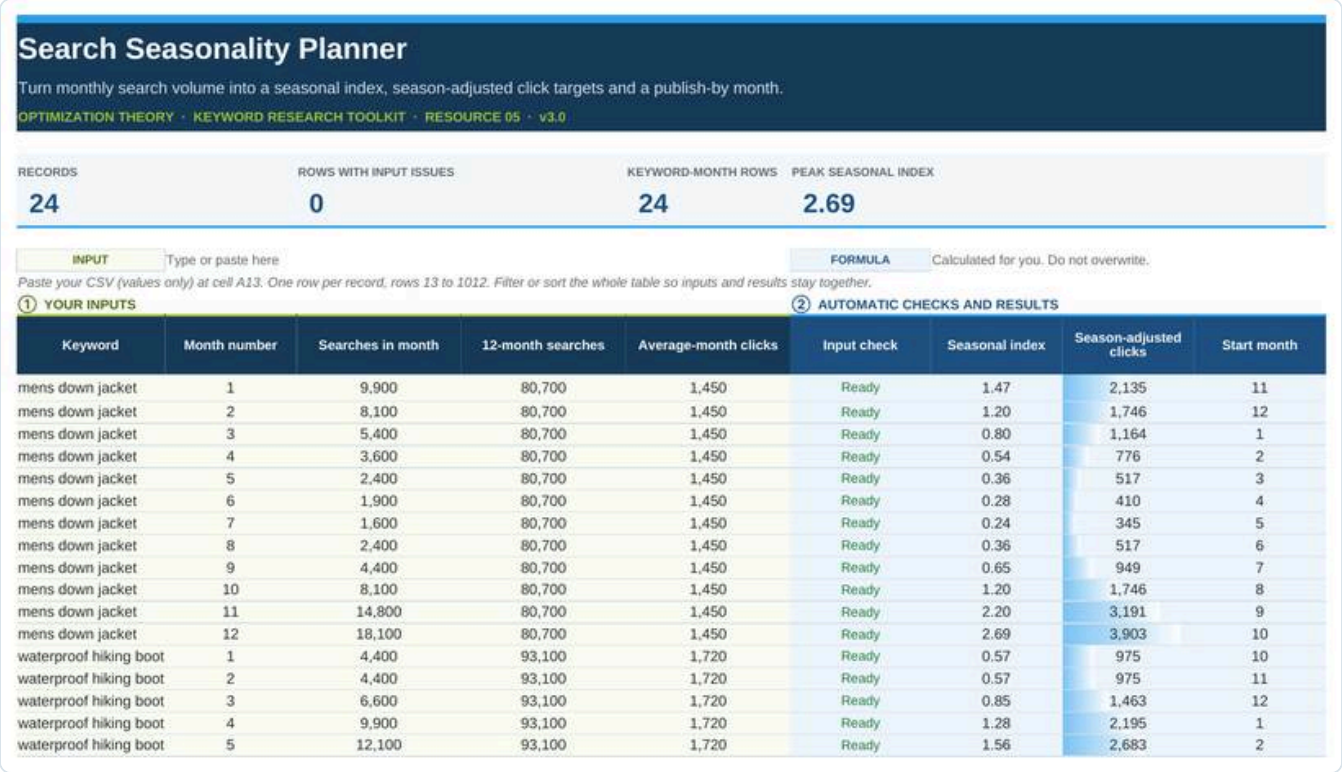
Add baseline clicks and lead time

Baseline clicks are your average monthly clicks today. Lead months is how far ahead you need to publish, typically 2 to 4.

4

Plan from the Start month

Read the seasonal index chart, then schedule work by the Start month column, not the peak month.



Search Seasonality Planner

Turn monthly search volume into a seasonal index, season-adjusted click targets and a publish-by month.

OPTIMIZATION THEORY · KEYWORD RESEARCH TOOLKIT · RESOURCE 05 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	KEYWORD-MONTH ROWS	PEAK SEASONAL INDEX
24	0	24	2.69

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 1012. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Keyword	Month number	Searches in month	12-month searches	Average-month clicks	Input check	Seasonal index	Season-adjusted clicks	Start month
mens down jacket	1	9,900	80,700	1,450	Ready	1.47	2,135	11
mens down jacket	2	8,100	80,700	1,450	Ready	1.20	1,746	12
mens down jacket	3	5,400	80,700	1,450	Ready	0.80	1,164	1
mens down jacket	4	3,600	80,700	1,450	Ready	0.54	776	2
mens down jacket	5	2,400	80,700	1,450	Ready	0.36	517	3
mens down jacket	6	1,900	80,700	1,450	Ready	0.28	410	4
mens down jacket	7	1,600	80,700	1,450	Ready	0.24	345	5
mens down jacket	8	2,400	80,700	1,450	Ready	0.36	517	6
mens down jacket	9	4,400	80,700	1,450	Ready	0.65	949	7
mens down jacket	10	8,100	80,700	1,450	Ready	1.20	1,746	8
mens down jacket	11	14,800	80,700	1,450	Ready	2.20	3,191	9
mens down jacket	12	18,100	80,700	1,450	Ready	2.69	3,903	10
waterproof hiking boot	1	4,400	93,100	1,720	Ready	0.57	975	10
waterproof hiking boot	2	4,400	93,100	1,720	Ready	0.57	975	11
waterproof hiking boot	3	6,600	93,100	1,720	Ready	0.85	1,463	12
waterproof hiking boot	4	9,900	93,100	1,720	Ready	1.28	2,195	1
waterproof hiking boot	5	12,100	93,100	1,720	Ready	1.56	2,683	2

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Keyword Overview**: search volume, monthly history, difficulty and intent for a list of keywords.

A helper command builds the input rows from saved API responses. The seasonality command expands each keyword's 12-month history into 12 rows and calculates the annual total. Add base clicks and lead months yourself.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/keyword_overview/live
[
  {
    "keywords": [
      "your keyword 1",
      "your keyword 2"
    ],
    "location_code": 2840,
    "language_code": "en"
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py seasonality --input keyword-overview.json --output my-inputs.csv
```

Fills automatically	You add
Keyword, Month number, Searches in month, 12-month searches	Average-month clicks, Production lead months

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`keyword`	Keyword	Exact query in the selected country and language.	DataForSEO: keyword
`month`	Month number	Calendar month 1 through 12.	DataForSEO: month
`monthly_searches`	Searches in month	Search volume for this keyword-month from monthly_searches.	DataForSEO: monthly_searches
`annual_total`	12-month searches	Sum of the same 12 monthly values for this keyword.	DataForSEO: annual_total
`base_clicks`	Average-month clicks	Assumed clicks in an average month, before seasonality.	Your records or manual review
`lead_months`	Production lead months	Whole months needed before peak demand.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

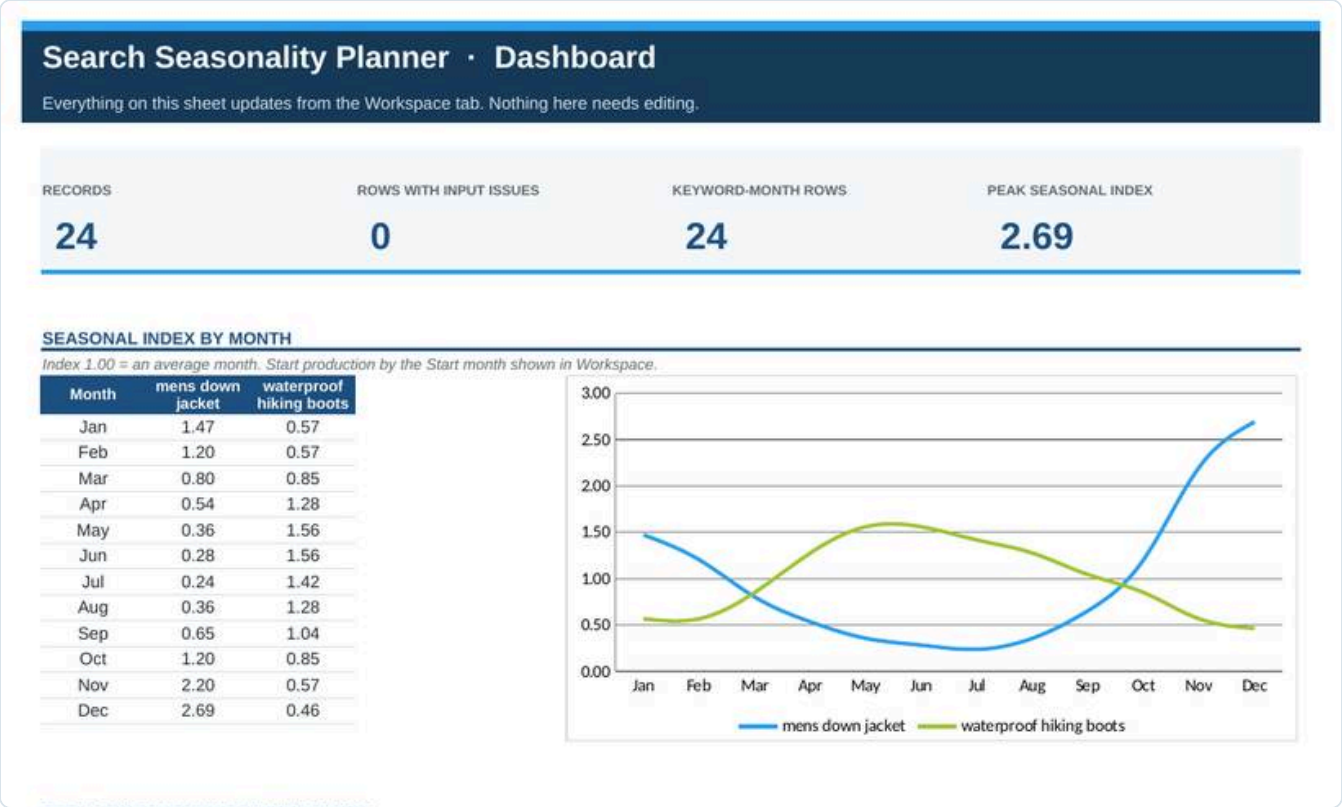
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 24 example rows.

24	0	24	2.69
Records	Rows with input issues	Keyword-month rows	Peak seasonal index

The down jacket peaks in December at well over twice its average month, so production needs to start in October. Hiking boots run the other way, peaking in late spring.

Top 10 by season-adjusted clicks

#	Keyword	Season-adjusted clicks
1	mens down jacket	3,903
2	mens down jacket	3,191
3	waterproof hiking boots	2,683
4	waterproof hiking boots	2,683
5	waterproof hiking boots	2,439



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

An index of 2 means twice the trailing 12-month average. It does not mean demand doubled year over year.

Limits. Historical patterns can shift. The annual total must cover the same 12 monthly observations.

Mistakes to avoid

Using a single average month as the forecast. Flat monthly targets make every winter look like a failure and every summer like a win. Report against the seasonal index.

Planning content in the peak month. By the time demand peaks it's too late to rank. Use the Start month.

Mixing years. Keep the 12 months from one continuous year so the annual total matches.

Tips from the field

Feed the index into the SEO forecast template's seasonality column.

Use the same index to explain month-over-month swings in reporting.

Pair with the content calendar template so due dates come from Start month automatically.

Questions people ask

What is search seasonality?

It's the predictable rise and fall of search demand for a keyword across the year, driven by weather, holidays, school terms and buying cycles.

How do I calculate a seasonal index?

Divide a month's search volume by the average monthly volume for the year. Above 1 is above-average demand; below 1 is below.

How far ahead should I publish seasonal content?

Usually two to four months before the peak, longer for competitive topics or new sites. That's what the lead months input controls.

Where can I get monthly search volume?

Google Keyword Planner, Google Trends (as a relative index), or the DataForSEO search volume endpoint, which returns 12 months per keyword.

Templates that work well with this one

SEO Forecast Template

Project added clicks and contribution per keyword cluster with CTR, attainment and seasonality you can defend.

SEO Content Calendar Template

Track owners, due dates and estimated vs completed hours, and flag overdue work automatically.

Keyword Prioritization Template

Rank every keyword by the profit it could add per hour of work, not by search volume alone.

SEO ROI Calculator

Turn incremental sessions into revenue, contribution, net return and a break-even month against real SEO costs.

SEO Visibility Score Calculator

Weight rankings by search volume and CTR to see real visibility gains and losses across a fixed keyword set.

SEO Roadmap Template

Sequence 90 days of SEO and GEO work by weighted opportunity per hour, dependencies and acceptance criteria.

Read the full tutorial online: **optimizationtheory.com/download-view/seo-seasonality-planner/**
Get all six templates in the **Keyword Research Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

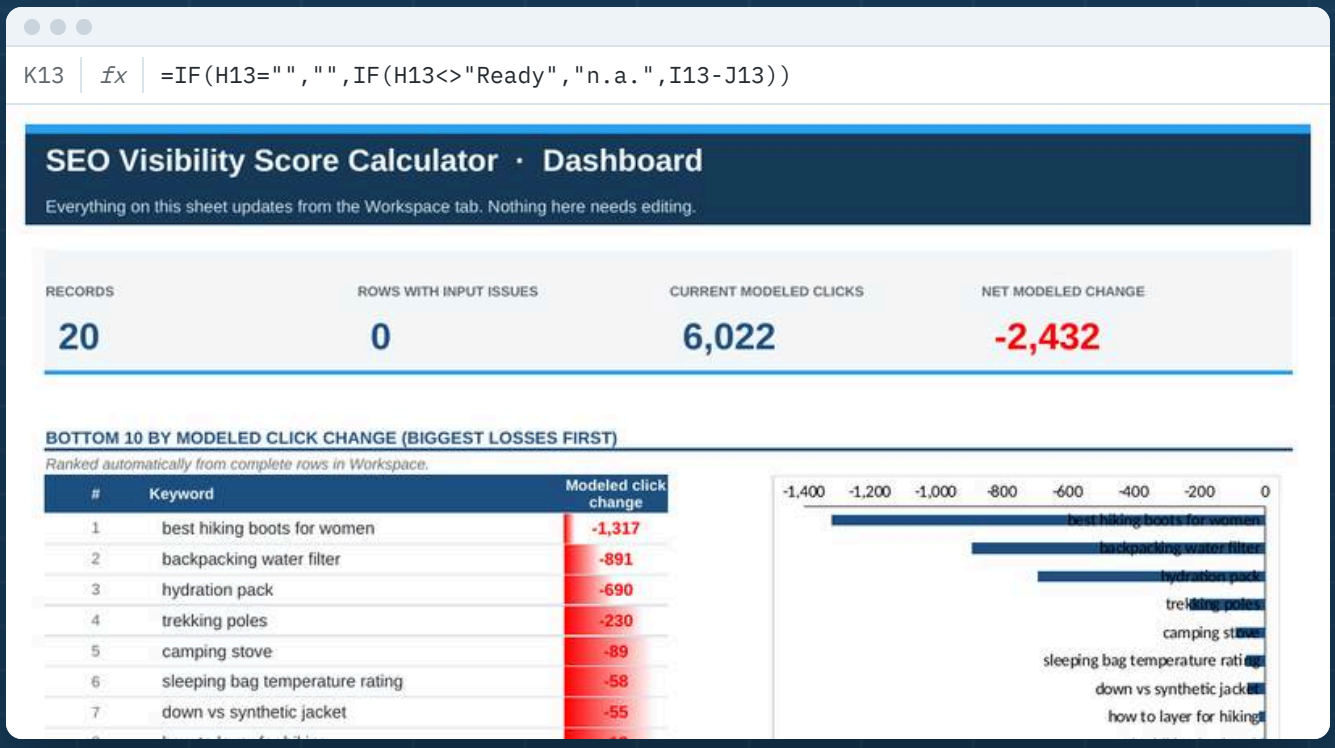
OptimizationTheory.com

Keyword Research Toolkit, resource 06

SEO Visibility Score Calculator

Weight rankings by search volume and CTR to see real visibility gains and losses across a fixed keyword set.

Built for the DataForSEO API: Labs: Ranked Keywords



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Whether your visibility for a stable keyword set went up or down, and which keywords drove the change, measured in modeled clicks rather than average position.

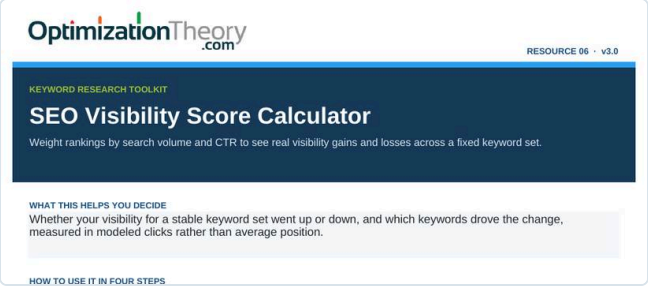
Average position is a bad scoreboard. Moving a 50-search keyword from 40 to 10 and dropping a 40,000-search keyword from 2 to 4 can produce the same average change while one is a rounding error and the other is a real loss.

This SEO visibility score calculator weights every ranking by search volume and the CTR you'd expect at that position. It models clicks for the current and previous period, shows the change per keyword, and totals it into a visibility number you can track over time without confusing it with actual traffic.

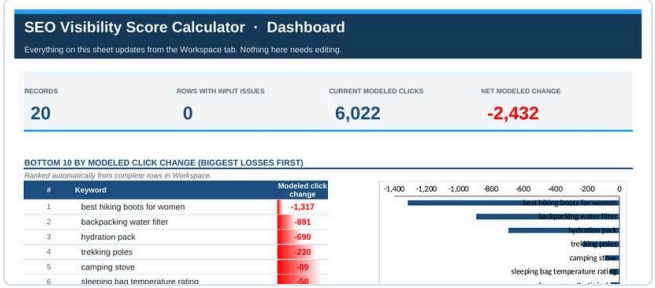
Who it's for

- SEOs reporting rank movement to stakeholders
- Teams that track a fixed keyword basket weekly or monthly
- Anyone checking an algorithm update's impact on priority keywords
- Agencies replacing average position in client reports

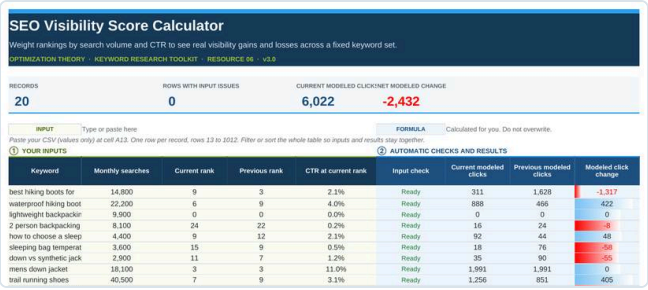
What's in the workbook



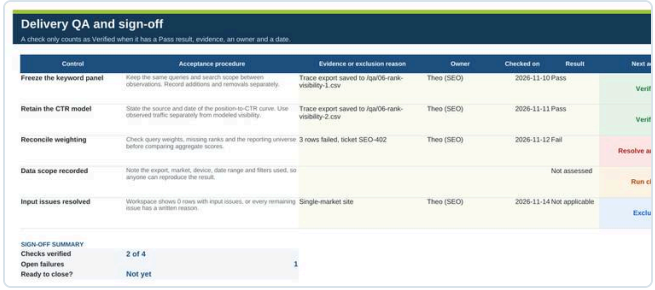
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 1,000 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Current modeled clicks = volume × CTR at current rank (0 if not ranking). Previous modeled clicks = volume × CTR at previous rank. Change = current – previous. The total is your visibility score for the set.

The key formula, as written in the workbook

```
=IF(H13="","",IF(H13<>"Ready","n.a.",I13-J13))
```

Result column	Plain-English formula	What it tells you
Current modeled clicks	IF(Current rank=0,0,Monthly searches × CTR at current rank)	Search-volume-weighted CTR opportunity for the current rank.
Previous modeled clicks	IF(Previous rank=0,0,Monthly searches × CTR at previous rank)	Same keyword volume used at the prior CTR to isolate rank movement.
Modeled click change	Current modeled clicks-Previous modeled clicks	Current modeled clicks minus prior modeled clicks.

How to use it, step by step

1

Fix your keyword set

Choose the keywords you'll track every period and keep the list stable, so changes reflect rankings, not list edits.

2

Enter both periods' ranks

Add current and previous ranks. Use 0 for not ranking within your tracked depth.

3

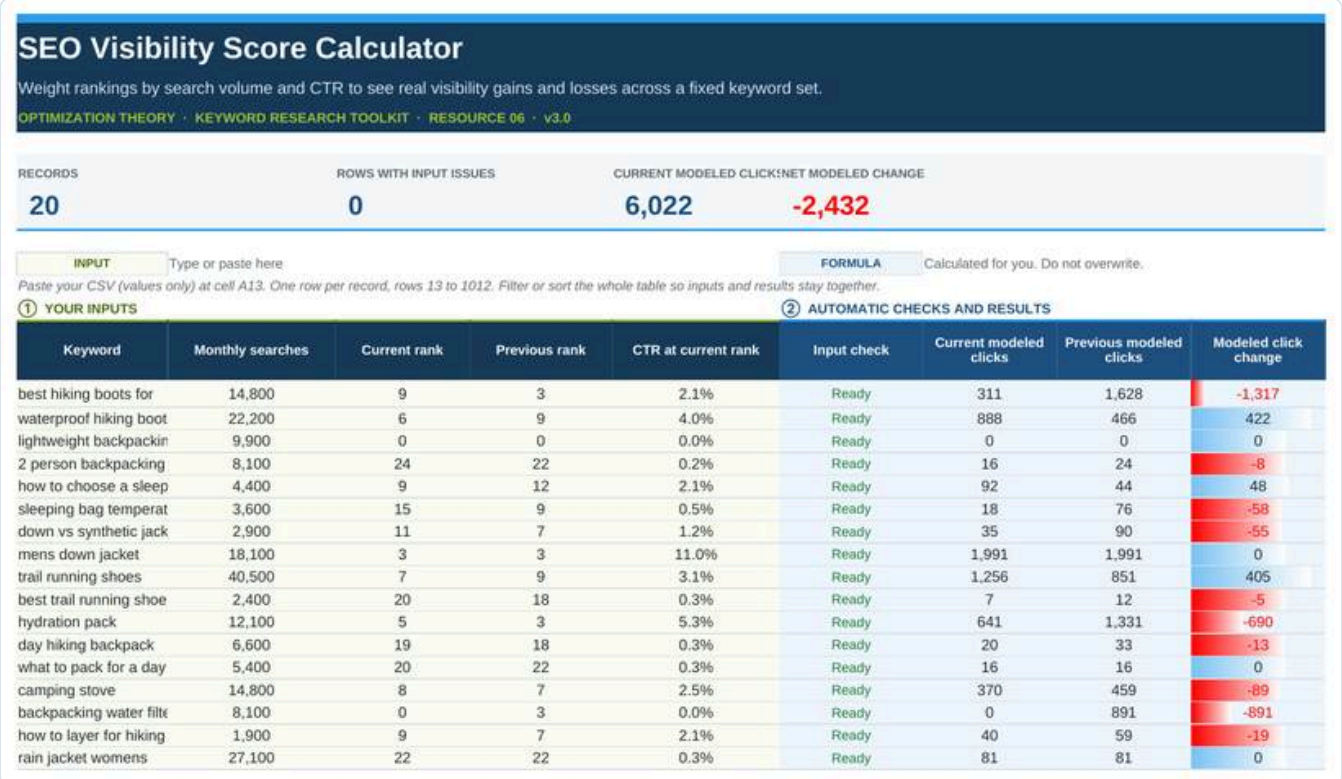
Apply a CTR curve

Enter the CTR for each rank, ideally from your own Search Console data. The template ships with a typical curve in the example.

4

Read the losers first

The Dashboard lists the biggest modeled losses first. Investigate those before celebrating the gains.



SEO Visibility Score Calculator

Weight rankings by search volume and CTR to see real visibility gains and losses across a fixed keyword set.

OPTIMIZATION THEORY · KEYWORD RESEARCH TOOLKIT · RESOURCE 06 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	CURRENT MODELED CLICKS	NET MODELED CHANGE
20	0	6,022	-2,432

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 1012. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Keyword	Monthly searches	Current rank	Previous rank	CTR at current rank	Input check	Current modeled clicks	Previous modeled clicks	Modeled click change
best hiking boots for	14,800	9	3	2.1%	Ready	311	1,628	-1,317
waterproof hiking boot	22,200	6	9	4.0%	Ready	888	466	422
lightweight backpackin	9,900	0	0	0.0%	Ready	0	0	0
2 person backpacking	8,100	24	22	0.2%	Ready	16	24	-8
how to choose a sleep	4,400	9	12	2.1%	Ready	92	44	48
sleeping bag temperat	3,600	15	9	0.5%	Ready	18	76	-58
down vs synthetic jack	2,900	11	7	1.2%	Ready	35	90	-55
mens down jacket	18,100	3	3	11.0%	Ready	1,991	1,991	0
trail running shoes	40,500	7	9	3.1%	Ready	1,256	851	405
best trail running shoe	2,400	20	18	0.3%	Ready	7	12	-5
hydration pack	12,100	5	3	5.3%	Ready	641	1,331	-690
day hiking backpack	6,600	19	18	0.3%	Ready	20	33	-13
what to pack for a day	5,400	20	22	0.3%	Ready	16	16	0
camping stove	14,800	8	7	2.5%	Ready	370	459	-89
backpacking water filte	8,100	0	3	0.0%	Ready	0	891	-891
how to layer for hiking	1,900	9	7	2.1%	Ready	40	59	-19
rain jacket womens	27,100	22	22	0.3%	Ready	81	81	0

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Ranked Keywords**: every keyword a domain ranks for, with its ranking URL, position and volume.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/ranked_keywords/live
[
  {
    "target": "yourdomain.com",
    "location_code": 2840,
    "language_code": "en",
    "limit": 1000
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 06 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Keyword, Monthly searches, Current rank	Previous rank, CTR at current rank, CTR at previous rank

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`keyword`	Keyword	Exact query in the selected country and language.	DataForSEO: keyword
`search_volume`	Monthly searches	Provider monthly search-volume estimate. Use one market, language and source date.	DataForSEO: search_volume
`current_rank`	Current rank	Current organic rank. Zero means confirmed outside the tracked depth.	DataForSEO: rank
`previous_rank`	Previous rank	Previous organic rank at the same depth. Zero means confirmed not found.	Your records or manual review
`rank_ctr`	CTR at current rank	Assumed organic click-through rate as a decimal. Calibrate by device, brand and SERP layout. Decimal, 0.08 = 8%.	Your records or manual review
`previous_ctr`	CTR at previous rank	Assumed organic click-through rate as a decimal. Calibrate by device, brand and SERP layout. Decimal, 0.08 = 8%.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

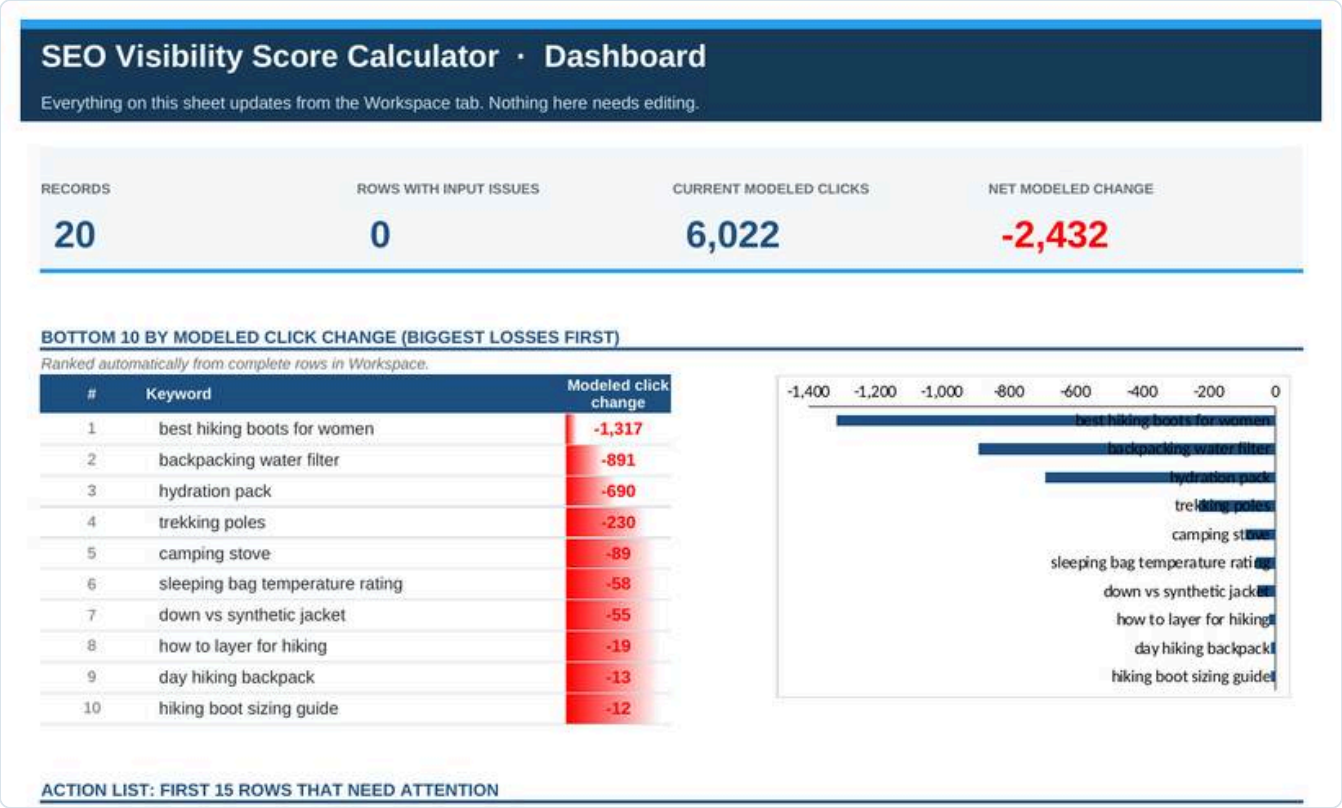
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 20 example rows.

20	0	6,022	-2,432
Records	Rows with input issues	Current modeled clicks	Net modeled change

Twelve of the 20 example keywords lost modeled clicks and only four gained, for a net loss of about 2,400 clicks, led by 'best hiking boots for women'. Average position would have hidden how much of that loss sits on high-volume terms.

Bottom 10 by modeled click change (biggest losses first)

#	Keyword	Modeled click change
1	best hiking boots for women	-1,317
2	backpacking water filter	-891
3	hydration pack	-690
4	trekking poles	-230
5	camping stove	-89



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Use the result as an index for this query set. Compare actual clicks separately in Search Console.

Limits. Provider ETV, modeled CTR clicks and Search Console clicks are different measures. Do not add them together.

Mistakes to avoid

Calling modeled clicks traffic. This is visibility, not observed traffic. Compare it with Search Console clicks, don't substitute it.

Changing the keyword set mid-series. Adding keywords inflates visibility without any ranking change. Start a new series instead.

Using one CTR curve for every SERP. SERPs with ads, shopping or AI Overviews have lower organic CTR. Use separate curves for very different SERP types.

Tips from the field

Track the same set in the local grid tracker for location-sensitive keywords.

Annotate update dates so changes line up with events.

Use your own CTR by position from Search Console; it's more accurate than any industry curve.

Questions people ask

What is an SEO visibility score?

A single number that summarizes how visible a site is for a set of keywords, typically by weighting each ranking by search volume and expected CTR.

Why not just use average position?

Average position treats every keyword equally. Visibility weights them by how much traffic each position is actually worth.

Where do the CTR values come from?

Ideally from your own Search Console CTR by position. Otherwise use a published CTR curve and note it in Source reference.

Is this the same as share of voice?

It's close. Share of voice compares your visibility with competitors' for the same set; this template measures your own change over time.

Templates that work well with this one

Keyword Prioritization Template
Rank every keyword by the profit it could add per hour of work, not by search volume alone.

Local Rank Grid Tracker
Log rankings across a geo grid, see a colour heatmap and measure weighted top-3 coverage for any local keyword.

AI Share of Voice Calculator
Compare citation rate and share across competitor domains inside one fixed set of AI answers.

Post-Migration SEO Monitoring Template
Compare each migrated segment with an untouched control so you can tell real migration loss from seasonality.

Content Decay Analysis Template
Separate lost impressions, lower CTR and falling demand, so you refresh the pages that really decayed.

SEO ROI Calculator
Turn incremental sessions into revenue, contribution, net return and a break-even month against real SEO costs.

Read the full tutorial online: **optimizationtheory.com/download-view/seo-visibility-score-calculator/**
Get all six templates in the **Keyword Research Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

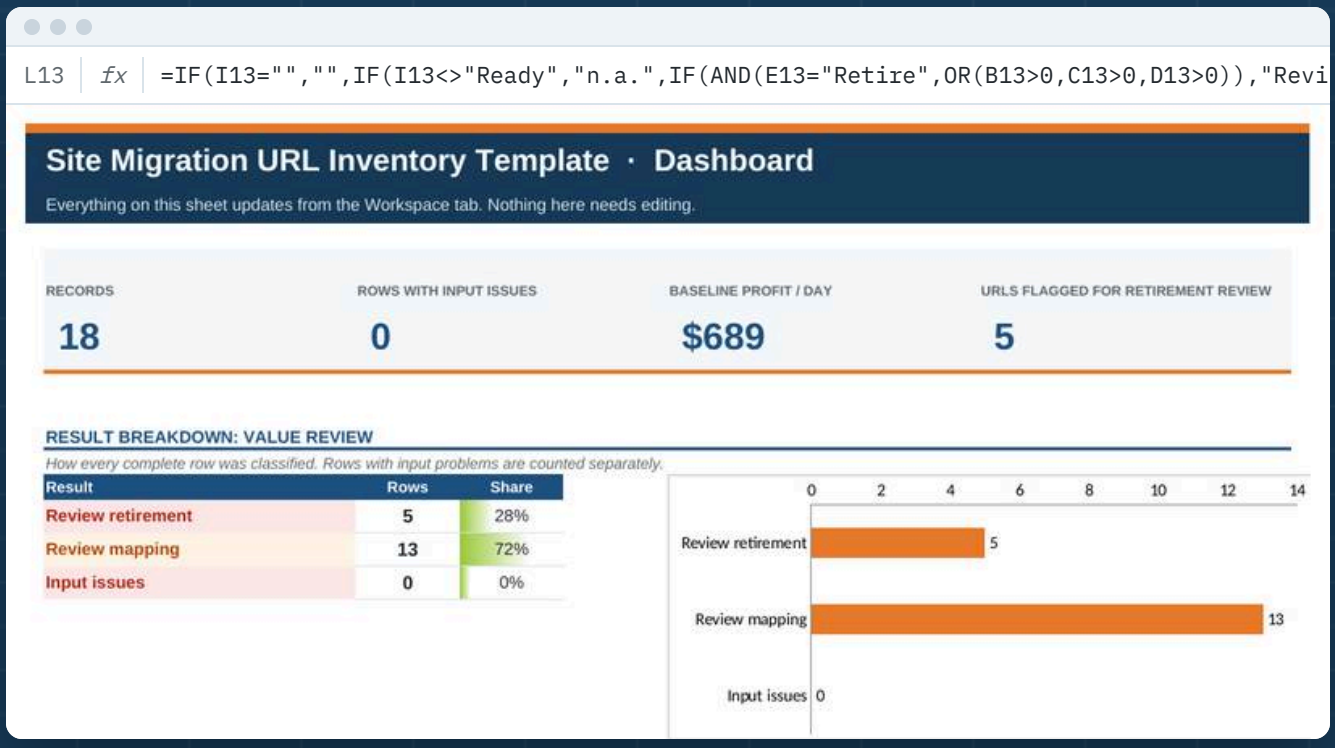
OptimizationTheory.com

SEO Migration Toolkit, resource 07

Site Migration URL Inventory Template

Inventory every legacy URL with its traffic, profit and links, assign a destination and catch risky retirements.

Built for the DataForSEO API: On-Page API



Jourdan Rombough, optimizationtheory.com

What this template decides

Which legacy URLs carry real value, what happens to each one at launch, and which planned retirements would throw away clicks, revenue or backlinks.

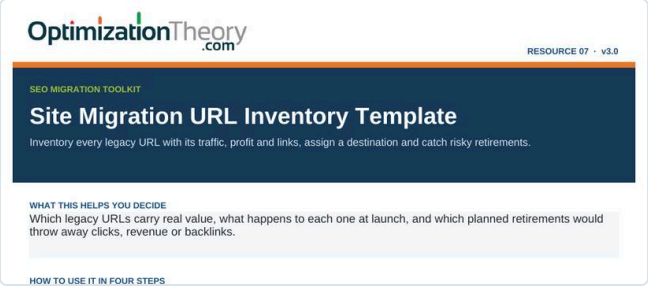
Every migration disaster has the same root cause: a URL nobody knew mattered. The page with 30 referring domains that got retired, the old guide that quietly drove a fifth of conversions, the size chart that customers bookmarked. A migration URL inventory exists to make those pages impossible to miss.

This site migration spreadsheet lists each legacy URL with 90-day clicks, profit and referring domains, a disposition (redirect, keep, merge or retire), its destination and an owner. It converts the 90-day totals into daily baselines you can monitor after launch, and flags any page marked Retire that still has clicks, profit or links as Review retirement.

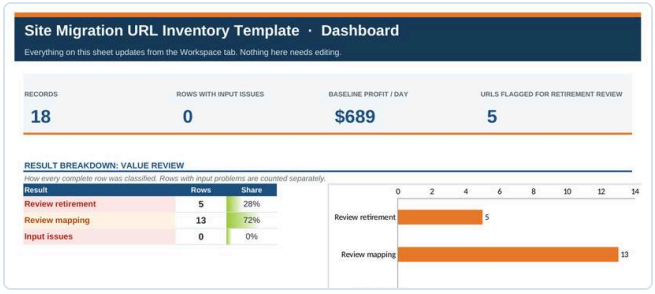
Who it's for

- SEOs planning a redesign, replatform, domain change or URL restructure
- Developers who need a clean list of URLs and destinations
- Ecommerce managers moving between Shopify, WooCommerce, Magento or BigCommerce
- Project managers who need a single migration source of truth

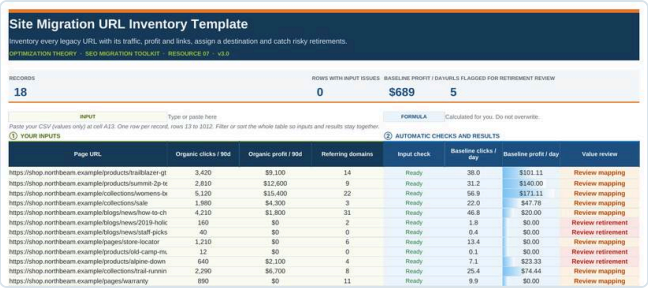
What's in the workbook



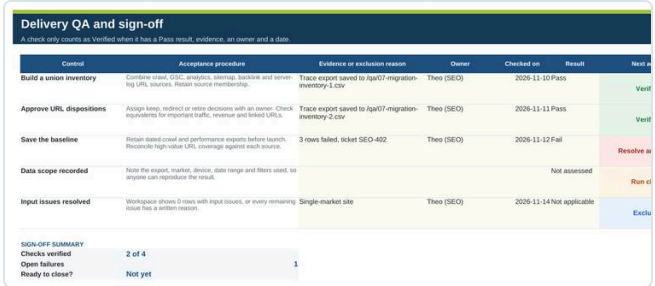
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 1,000 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Baseline clicks / day = 90-day clicks ÷ 90, and the same for profit. These daily baselines become your post-launch benchmark. Value review flags Review retirement when a URL marked Retire has any clicks, profit or referring domains in the window.

The key formula, as written in the workbook

```
=IF(I13="","",IF(I13<>"Ready","n.a.",IF(AND(E13="Retire",OR(B13>0,C13>0,D13>0)),"Review retiremen
t","Review mapping")))
```

Result column	Plain-English formula	What it tells you
Baseline clicks / day	Organic clicks ÷ 90d ÷ 90	Average daily baseline clicks.
Baseline profit / day	Organic profit ÷ 90d ÷ 90	Average daily baseline contribution.
Value review	IF(AND(Disposition="Retire",OR(Organic clicks ÷ 90d>0,Organic profit ÷ 90d>0,Referring domains>0)),"Review retirement","Review mapping")	Highlights retirement of a URL with observed value.

The results you'll see

Review retirement Review mapping

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Collect every legacy URL

Combine a full crawl, XML sitemaps, Search Console pages, analytics landing pages and backlink targets. Deduplicate.

2

Join value data

Add 90-day clicks from Search Console, profit or contribution from analytics, and referring domains from your backlink tool.

3

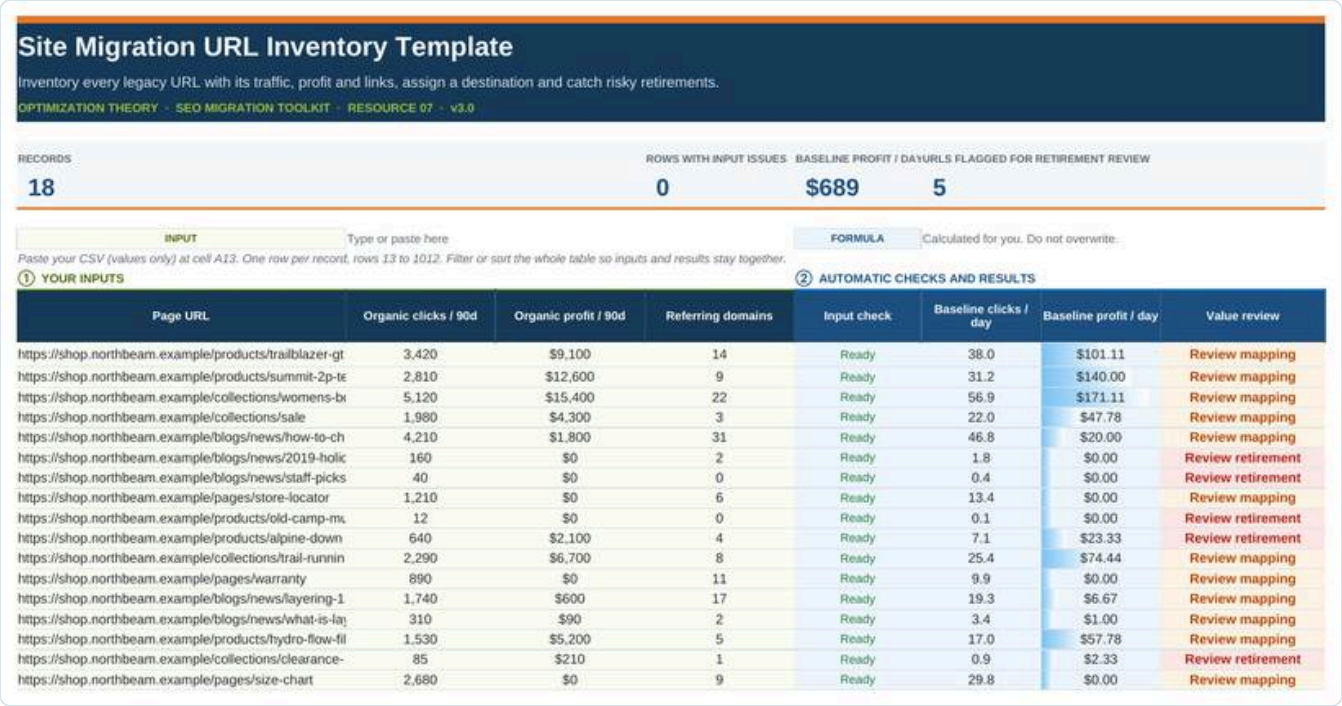
Assign a disposition and destination

Choose Redirect, Keep, Merge or Retire. Every Redirect and Merge needs a destination URL; retirements get N/A.

4

Clear every retirement flag

Open the Dashboard action list. Each Review retirement row has value. Redirect it to the closest equivalent or write down why not.



Site Migration URL Inventory Template

Inventory every legacy URL with its traffic, profit and links, assign a destination and catch risky retirements.

OPTIMIZATION THEORY · SEO MIGRATION TOOLKIT · RESOURCE 07 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	BASELINE PROFIT / DAY	URLS FLAGGED FOR RETIREMENT REVIEW
18	0	$689	5

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 1012. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Page URL	Organic clicks / 90d	Organic profit / 90d	Referring domains	Input check	Baseline clicks / day	Baseline profit / day	Value review
https://shop.northbeam.example/products/trailblazer-gt	3,420	$9,100	14	Ready	38.0	$101.11	Review mapping
https://shop.northbeam.example/products/summit-2p-te	2,810	$12,600	9	Ready	31.2	$140.00	Review mapping
https://shop.northbeam.example/collections/womens-bo	5,120	$15,400	22	Ready	56.9	$171.11	Review mapping
https://shop.northbeam.example/collections/sale	1,980	$4,300	3	Ready	22.0	$47.78	Review mapping
https://shop.northbeam.example/blogs/news/how-to-ch	4,210	$1,800	31	Ready	46.8	$20.00	Review mapping
https://shop.northbeam.example/blogs/news/2019-holic	160	$0	2	Ready	1.8	$0.00	Review retirement
https://shop.northbeam.example/blogs/news/staff-picks	40	$0	0	Ready	0.4	$0.00	Review retirement
https://shop.northbeam.example/pages/store-locator	1,210	$0	6	Ready	13.4	$0.00	Review mapping
https://shop.northbeam.example/products/old-camp-mu	12	$0	0	Ready	0.1	$0.00	Review retirement
https://shop.northbeam.example/products/alpine-down	640	$2,100	4	Ready	7.1	$23.33	Review retirement
https://shop.northbeam.example/collections/trail-runnin	2,290	$6,700	8	Ready	25.4	$74.44	Review mapping
https://shop.northbeam.example/pages/warranty	890	$0	11	Ready	9.9	$0.00	Review mapping
https://shop.northbeam.example/blogs/news/layering-1	1,740	$600	17	Ready	19.3	$6.67	Review mapping
https://shop.northbeam.example/blogs/news/what-is-lay	310	$90	2	Ready	3.4	$1.00	Review mapping
https://shop.northbeam.example/products/hydro-flow-fil	1,530	$5,200	5	Ready	17.0	$57.78	Review mapping
https://shop.northbeam.example/collections/clearance-	85	$210	1	Ready	0.9	$2.33	Review retirement
https://shop.northbeam.example/pages/size-chart	2,680	$0	9	Ready	29.8	$0.00	Review mapping

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 07 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Page URL	Organic clicks / 90d, Organic profit / 90d, Referring domains, Disposition, Destination URL, Owner

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`url`	Page URL	Exact absolute URL. Keep case and query parameters unless a documented normalization rule applies.	DataForSEO: url
`clicks_90d`	Organic clicks / 90d	GSC clicks over a fixed 90-day baseline.	Your records or manual review
`profit_90d`	Organic profit / 90d	Contribution profit attributed under one documented analytics model.	Your records or manual review
`referring_domains`	Referring domains	Unique referring domains from a URL-level backlinks summary.	Your records or manual review
`disposition`	Disposition	Keep, redirect, merge or retire after relevance review.	Your records or manual review
`destination`	Destination URL	Intended equivalent URL. For retirement, enter RETIRE only after explicit review.	Your records or manual review
`owner`	Owner	Person accountable for the next action.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

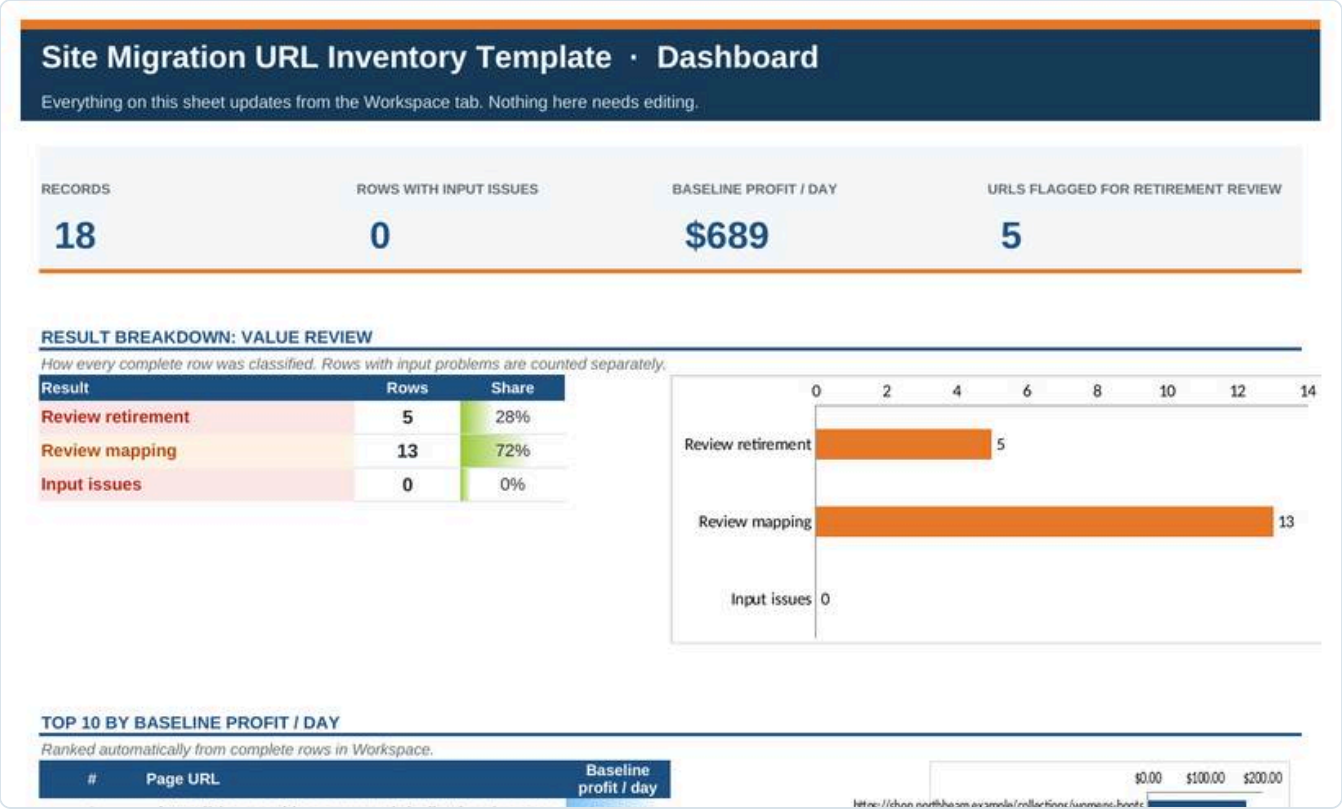
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 18 example rows.

18	0	$689	5
Records	Rows with input issues	Baseline profit / day	URLs flagged for retirement review

Five legacy URLs in the example were marked Retire, but several still have links or clicks. One retired product page has $2,100 in 90-day profit, exactly the kind of row that disappears in a big spreadsheet.

Top 10 by baseline profit / day

#	Page URL	Baseline profit / day
1	https://shop.northbeam.example/collections/womens-boots	$171.11
2	https://shop.northbeam.example/products/summit-2p-tent	$140.00
3	https://shop.northbeam.example/products/trailblazer-gtx-boot	$101.11
4	https://shop.northbeam.example/collections/trail-running	$74.44
5	https://shop.northbeam.example/products/hydro-flow-filter	$57.78



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Value helps order QA effort. Relevance and the intended user journey determine the correct destination.

Limits. Redirecting unrelated pages to a homepage can create poor outcomes. This workbook does not choose destinations automatically.

Mistakes to avoid

Building the list from one source. Crawls miss orphan pages, sitemaps miss old pages, analytics misses pages with no recent visits. Combine sources.

Retiring pages with backlinks. Even a dead product page can pass link value. Redirect it to the parent category instead of returning a 404.

Leaving destinations for the dev team to guess. If the inventory doesn't say where a URL goes, it'll get redirected to the homepage.

Tips from the field

Freeze the inventory a week before launch and version it; late additions go in a change log.

Feed the Redirect rows straight into the redirect mapping template.

Keep the daily baselines; the post-migration monitor uses them.

Questions people ask

What should a site migration spreadsheet include?

Every legacy URL, its traffic and revenue, backlinks, the planned action (redirect, keep, merge, retire), destination URL and owner. This template adds daily baselines and automatic risk flags.

How do I find all URLs on my site before a migration?

Combine a crawler export, XML sitemaps, Search Console's page report, analytics landing pages and the target URLs from your backlink tool, then deduplicate.

Should I redirect pages with no traffic?

Redirect anything with backlinks or historical value. Pages with no traffic, no links and no purpose can be retired, but log the decision.

What's the difference between merge and redirect?

Redirect means one old URL maps to one equivalent new page. Merge means several old pages are combined into one new page, each redirecting to it.

Templates that work well with this one

Redirect Mapping Template

Map every old URL to its new home and verify each redirect: one permanent hop, a 200 page, no noindex, matching canonical.

SEO Migration Checklist

Every pre-launch, launch-day and post-launch control with an owner, evidence and automatic launch-blocker flags.

Post-Migration SEO Monitoring Template

Compare each migrated segment with an untouched control so you can tell real migration loss from seasonality.

Indexability Audit Template

Check status, robots, noindex and canonical on every page you want indexed, then see exactly what to fix first.

Content Audit Template

Score every URL by lost clicks, conversions and links, choose keep, refresh, merge or retire, and catch the risky calls.

Keyword Mapping Template

Assign every keyword to exactly one URL and catch conflicting assignments before they become cannibalization.

Read the full tutorial online: **optimizationtheory.com/download-view/site-migration-url-inventory/**
Get all six templates in the **SEO Migration Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

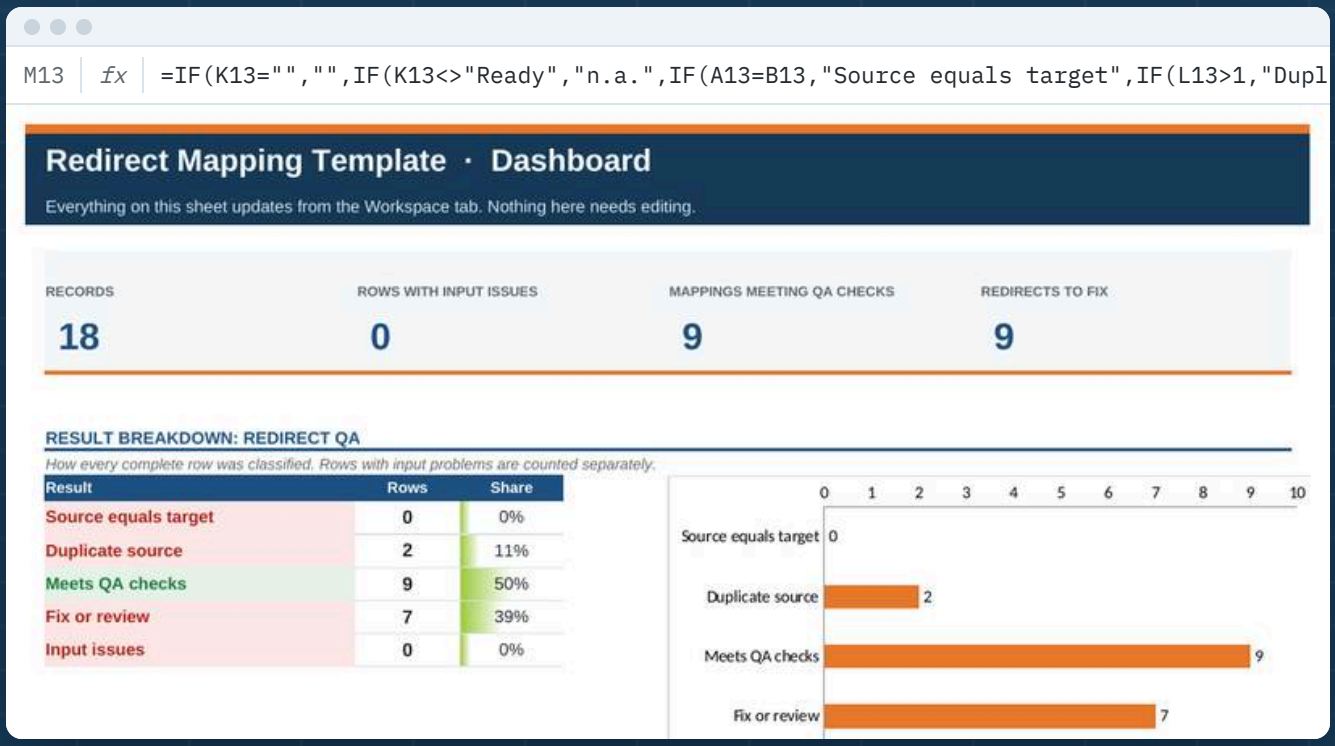
OptimizationTheory.com

SEO Migration Toolkit, resource 08

Redirect Mapping Template

Map every old URL to its new home and verify each redirect: one permanent hop, a 200 page, no noindex, matching canonical.

Built for the DataForSEO API: On-Page API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Whether each planned redirect actually reaches the approved destination in one permanent hop, on an indexable page whose canonical agrees, with a human sign-off.

A redirect map is only as good as its QA. Plenty of migrations had a perfect spreadsheet of old and new URLs and still lost traffic, because the server returned 302s, chained three hops, landed on a page with a stray noindex, or pointed at a canonical somewhere else entirely.

This redirect mapping template pairs every old URL with its approved target, then checks the observed result against seven conditions: a 301 or 308 source response, exactly one hop, the final URL equals the target, a 200 final status, no noindex, a canonical that matches, and a human review of the destination. Anything that fails is flagged Fix or review, duplicate source rows are caught, and the Dashboard shows what's broken.

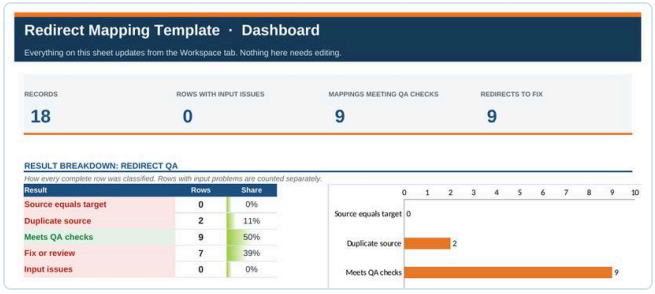
Who it's for

- SEOs and developers running a site migration or URL restructure
- Teams cleaning up legacy redirect chains
- QA leads who need pass/fail evidence for launch sign-off
- Agencies handing redirect files to a client's dev team

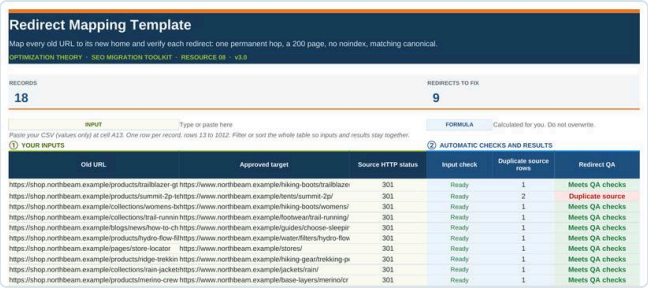
What's in the workbook



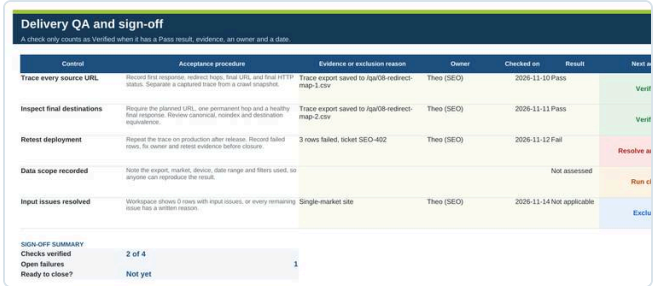
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 1,000 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Redirect QA returns Meets QA checks only when the source is a 301 or 308, hops = 1, final URL = target, final status = 200, noindex = 0, canonical = target and reviewed = 1. It returns Source equals target for self-redirects and Duplicate source when an old URL appears twice with potentially different targets.

The key formula, as written in the workbook

```
=IF(K13="","",IF(K13<>"Ready","n.a.",IF(A13=B13,"Source equals target",IF(L13>1,"Duplicate source",I
F(AND(OR(C13=301,C13=308),D13=1,E13=B13,F13=200,G13=0,H13=B13,I13=1),"Meets QA checks","Fix or revie
w")))))
```

Result column	Plain-English formula	What it tells you
Duplicate source rows	COUNTIFS(all Old URL,Old URL)	Duplicate sources must be reconciled before implementation.
Redirect QA	IF(Old URL=Approved target,"Source equals target",IF(Duplicate source rows>1,"Duplicate source",IF(AND(OR(Source HTTP status=301,Source HTTP status=308),Redirect hops=1,Observed final URL=Approved target,Final HTTP status=200,Final noindex=0,Final canonical URL=Approved target,Destination reviewed=1),"Meets QA checks","Fix or review")))	Checks source status, one hop, exact destination, final 200, index directive, canonical and human approval.

The results you'll see

Source equals target | Duplicate source | Meets QA checks | Fix or review

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Start from the URL inventory

Bring in every old URL with a Redirect or Merge disposition and its approved target.

2

Run a redirect trace

Use a crawler in list mode or a redirect checker to record the first status code, number of hops, final URL and final status for each old URL.

3

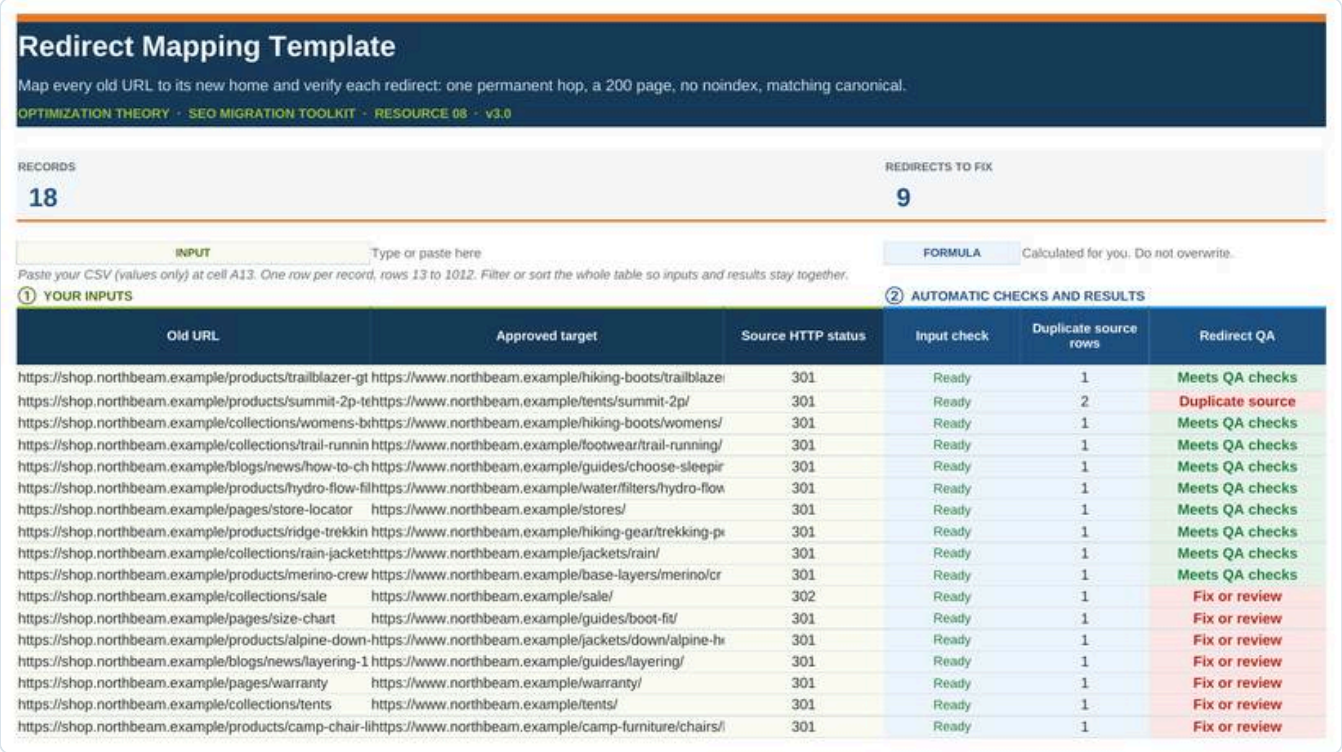
Add destination checks

Record whether the final page has noindex (1/0), its canonical URL, and whether a human has reviewed the destination as equivalent (1/0).

4

Fix, retest, sign off

Work the Fix or review rows, retrace them after deployment, then record evidence in Delivery QA.



Redirect Mapping Template

Map every old URL to its new home and verify each redirect: one permanent hop, a 200 page, no noindex, matching canonical.

OPTIMIZATION THEORY · SEO MIGRATION TOOLKIT · RESOURCE 08 · v3.0

RECORDS 18

REDIRECTS TO FIX 9

INPUT Type or paste here

FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 1012. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS

② AUTOMATIC CHECKS AND RESULTS

Old URL	Approved target	Source HTTP status	Input check	Duplicate source rows	Redirect QA
https://shop.northbeam.example/products/trailblazer-gt	https://www.northbeam.example/hiking-boots/trailblaze	301	Ready	1	Meets QA checks
https://shop.northbeam.example/products/summit-2p-t	https://www.northbeam.example/tents/summit-2p/	301	Ready	2	Duplicate source
https://shop.northbeam.example/collections/womens-b	https://www.northbeam.example/hiking-boots/womens/	301	Ready	1	Meets QA checks
https://shop.northbeam.example/collections/trail-runnin	https://www.northbeam.example/footwear/trail-running/	301	Ready	1	Meets QA checks
https://shop.northbeam.example/blogs/news/how-to-ch	https://www.northbeam.example/guides/choose-sleepir	301	Ready	1	Meets QA checks
https://shop.northbeam.example/products/hydro-flow-fil	https://www.northbeam.example/water/filters/hydro-flow	301	Ready	1	Meets QA checks
https://shop.northbeam.example/pages/store-locator	https://www.northbeam.example/stores/	301	Ready	1	Meets QA checks
https://shop.northbeam.example/products/ridge-trekkin	https://www.northbeam.example/hiking-gear/trekking-p	301	Ready	1	Meets QA checks
https://shop.northbeam.example/collections/rain-jacket	https://www.northbeam.example/jackets/rain/	301	Ready	1	Meets QA checks
https://shop.northbeam.example/products/merino-crew	https://www.northbeam.example/base-layers/merino/cr	301	Ready	1	Meets QA checks
https://shop.northbeam.example/collections/sale	https://www.northbeam.example/sale/	302	Ready	1	Fix or review
https://shop.northbeam.example/pages/size-chart	https://www.northbeam.example/guides/boot-fit/	301	Ready	1	Fix or review
https://shop.northbeam.example/products/alpine-down-	https://www.northbeam.example/jackets/down/alpine-h	301	Ready	1	Fix or review
https://shop.northbeam.example/blogs/news/layering-1	https://www.northbeam.example/guides/layering/	301	Ready	1	Fix or review
https://shop.northbeam.example/pages/warranty	https://www.northbeam.example/warranty/	301	Ready	1	Fix or review
https://shop.northbeam.example/collections/tents	https://www.northbeam.example/tents/	301	Ready	1	Fix or review
https://shop.northbeam.example/products/camp-chair-li	https://www.northbeam.example/camp-furniture/chairs/l	301	Ready	1	Fix or review

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 08 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Old URL, Source HTTP status, Final canonical URL	Approved target, Redirect hops, Observed final URL, Final HTTP status, Final noindex, Destination reviewed

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
old_url	Old URL	Exact source URL being retired or moved.	DataForSEO: url
target_url	Approved target	Reviewed equivalent destination.	Your records or manual review
observed_status	Source HTTP status	HTTP response at the old URL before following redirects.	DataForSEO: status_code
hops	Redirect hops	Measured number of redirects before the final response.	Your records or manual review
final_url	Observed final URL	Exact final URL from an HTTP redirect trace.	Your records or manual review
final_status	Final HTTP status	Status after following the full trace.	Your records or manual review
noindex	Final noindex	1 if the target has a blocking noindex directive, 0 if checked and absent. 1 = Yes, 0 = No.	Your records or manual review
canonical_url	Final canonical URL	Canonical declared by the final page.	DataForSEO: canonical_url
reviewed	Destination reviewed	1 only after a human approves relevance and user equivalence. 1 = Yes, 0 = No.	Your records or manual review
source_ref	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

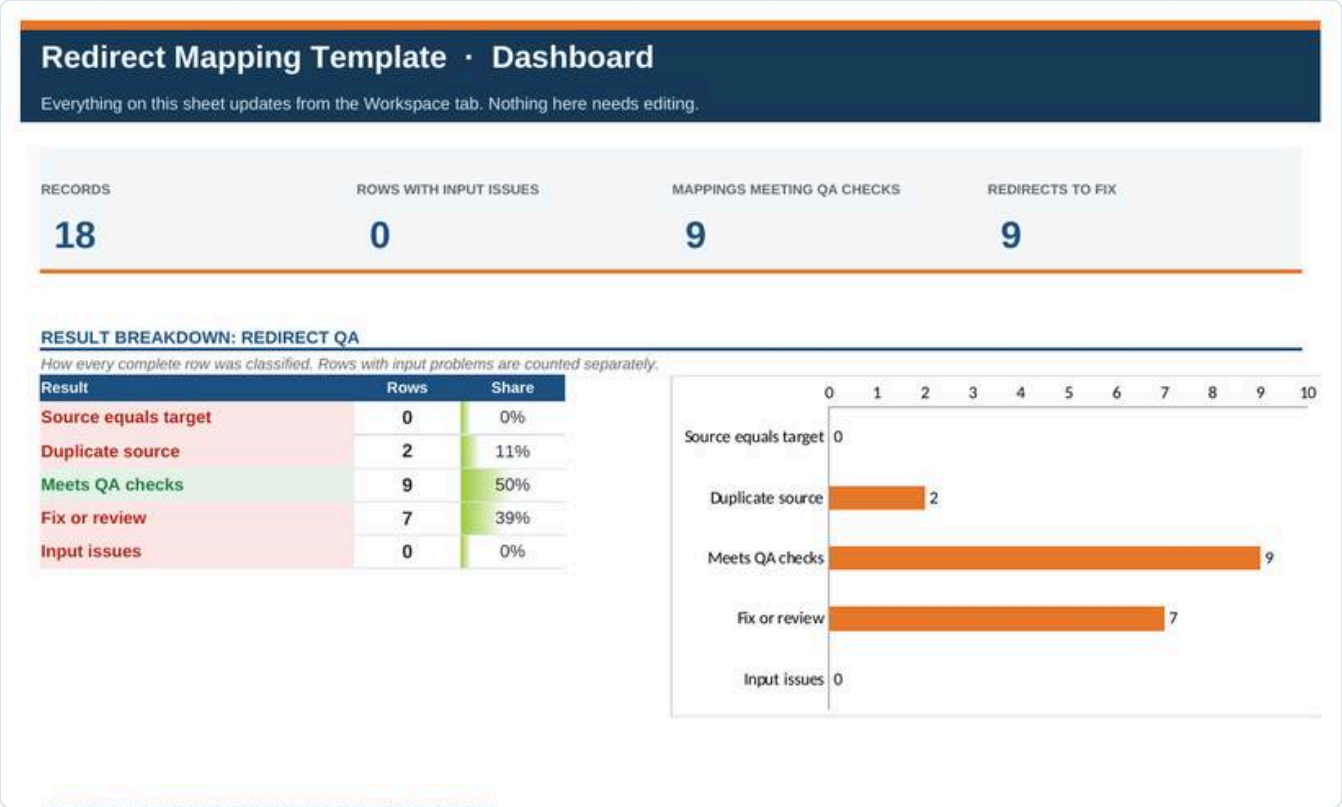
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 18 example rows.

18	0	9	9
Records	Rows with input issues	Mappings meeting QA checks	Redirects to fix

Half of the 18 example redirects fail at least one check. The failures are the classic ones: a 302 on the sale page, a three-hop chain, a target that 404s, a destination carrying noindex, and a canonical pointing at a sort parameter.

Result breakdown

Result	Rows	Share
Source equals target	0	0%
Duplicate source	2	11%
Meets QA checks	9	50%
Fix or review	7	39%
Input issues	0	0%



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Meets QA checks confirms only the listed observed conditions. It does not confirm indexing or relevance beyond the recorded review.

Limits. A crawl snapshot cannot substitute for a full redirect trace. Keep redirects and required old hosting operational according to the migration plan.

Mistakes to avoid

Accepting 302s. A temporary redirect tells Google the old URL may come back. Use 301 or 308 for permanent moves.

Leaving old redirects in place. New redirects on top of existing ones create chains. Update legacy rules to point directly at the final destination.

Redirecting everything to the homepage. Mass homepage redirects are treated like soft 404s. Map to the closest equivalent page.

Testing only on staging. Production server rules, CDNs and plugins behave differently. Retrace on production after launch.

Tips from the field

Trace the top 500 URLs by value on launch day, then the full list within 48 hours.

Keep redirects live for at least a year; longer for pages with strong backlinks.

Sort by Redirect QA, filter Fix or review, and hand that filtered list to dev as the ticket.

Questions people ask

What is a redirect map?

A spreadsheet that pairs every old URL with the new URL it should permanently redirect to during a migration or restructure.

Should I use a 301 or 308 redirect?

Both are permanent. 301 is universal and fine for almost every case; 308 also preserves the request method, which matters for forms and APIs. This template accepts either.

How many redirect hops are acceptable?

One. Google follows several, but each hop adds latency and risk. The template only passes single-hop redirects.

How do I check redirects in bulk?

Use a crawler in list mode (Screaming Frog, Sitebulb) or an HTTP checker to record the status chain, then paste the results into the Workspace.

Why does a correct redirect still fail QA?

Because the destination itself has a problem: a 404, a noindex tag, a canonical pointing elsewhere, or no human review yet.

Templates that work well with this one

Site Migration URL Inventory Template
Inventory every legacy URL with its traffic, profit and links, assign a destination and catch risky retirements.

SEO Migration Checklist
Every pre-launch, launch-day and post-launch control with an owner, evidence and automatic launch-blocker flags.

Post-Migration SEO Monitoring Template
Compare each migrated segment with an untouched control so you can tell real migration loss from seasonality.

Indexability Audit Template
Check status, robots, noindex and canonical on every page you want indexed, then see exactly what to fix first.

XML Sitemap Audit Template
Reconcile sitemap URLs against status, canonical, robots and noindex to see what to add, remove or fix.

Link Reclamation Template
Find lost and broken backlinks worth fixing and rank them by expected referrals per hour of outreach.

Read the full tutorial online: **optimizationtheory.com/download-view/redirect-mapping-template/**
Get all six templates in the **SEO Migration Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

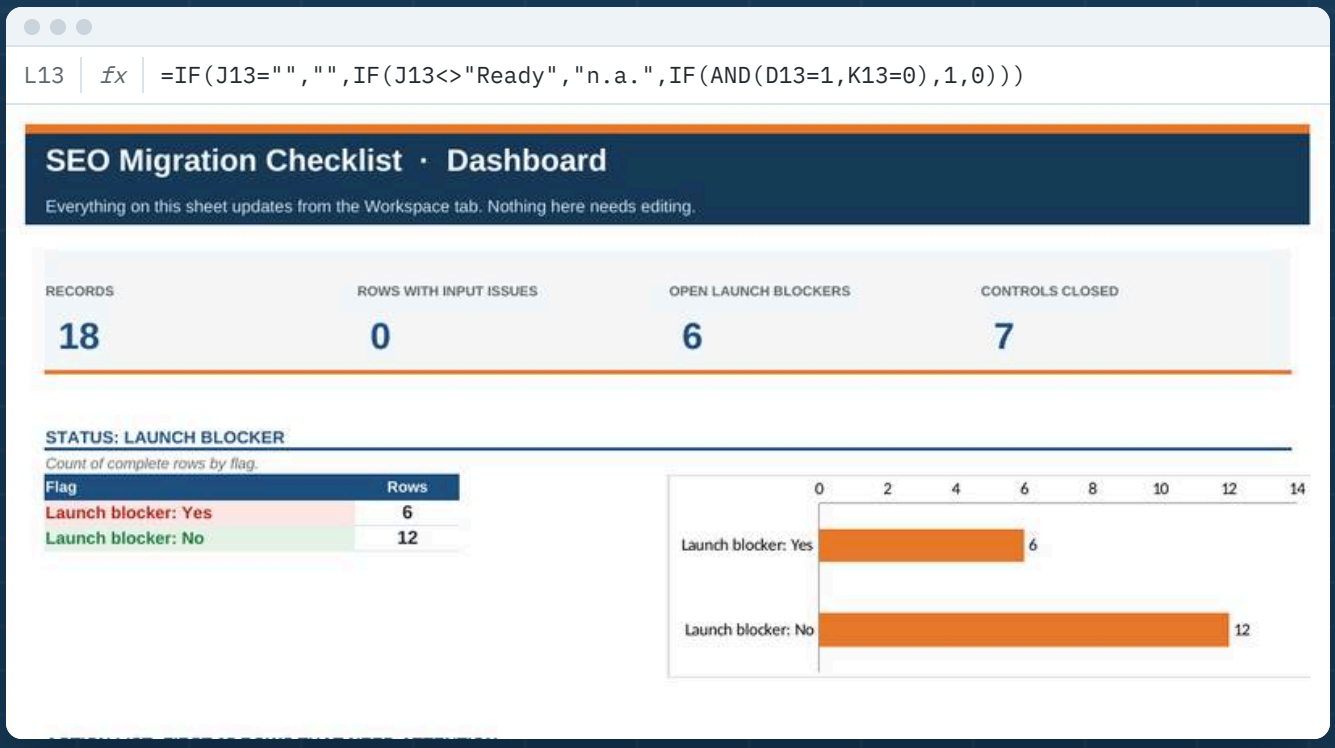
OptimizationTheory.com

SEO Migration Toolkit, resource 09

SEO Migration Checklist

Every pre-launch, launch-day and post-launch control with an owner, evidence and automatic launch-blocker flags.

Built for the DataForSEO API: On-Page API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Whether the migration is safe to launch: which critical controls are still open, who owns them, and what evidence closes them.

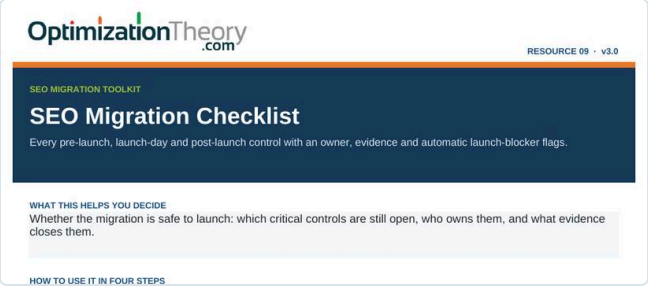
Migration checklists usually fail in one of two ways: they're too generic to act on, or every line is ticked without proof. A launch decision deserves better than a column of checkmarks.

This SEO migration checklist tracks each control by phase (pre-launch, launch day, post-launch), marks which ones are critical, and only counts a control as closed when it's Verified with evidence, or an approved Exception with evidence and a named approver. Any critical control that isn't closed is flagged as a launch blocker, and the Dashboard shows the blocker count front and center.

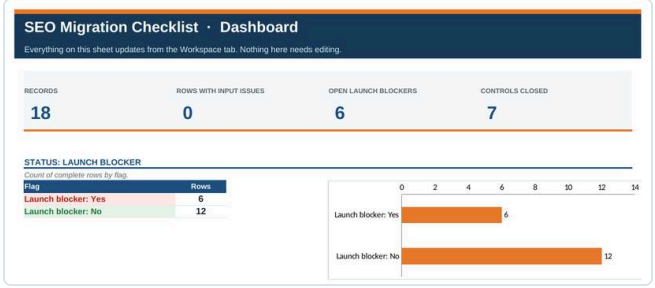
Who it's for

- SEO leads running a migration go/no-go
- Project managers who need SEO risks in the launch plan
- Developers who want clear acceptance criteria
- Agencies documenting what they verified and when

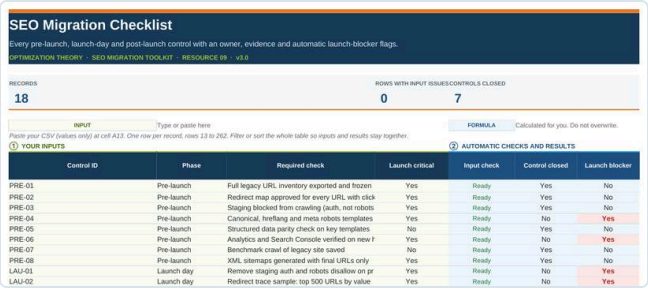
What's in the workbook



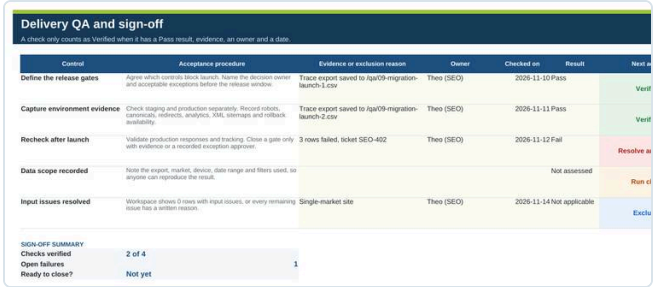
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Control closed = 1 when status is Verified and evidence exists, or status is Exception with evidence and an exception approver. Launch blocker = 1 when the control is critical and not closed.

The key formula, as written in the workbook

```
=IF(J13="","",IF(J13<>"Ready","n.a.",IF(AND(D13=1,K13=0),1,0)))
```

Result column	Plain-English formula	What it tells you
Control closed	IF(AND(Status="Verified",Evidence URL ≠ ""),1,IF(AND(Status="Exception",Evidence URL ≠ "",Exception approver ≠ ""),1,0))	Verified needs evidence. An exception needs both evidence and an approver.
Launch blocker	IF(AND(Launch critical=1,Control closed=0),1,0)	Critical controls remain blocking until verified or formally excepted.

How to use it, step by step

1

Review the controls

The workbook ships with 18 proven controls. Remove what doesn't apply, add your own and mark which are critical.

2

Assign owners

Every control needs a named person. 'Dev team' is a team, not an owner; name the lead if you can.

3

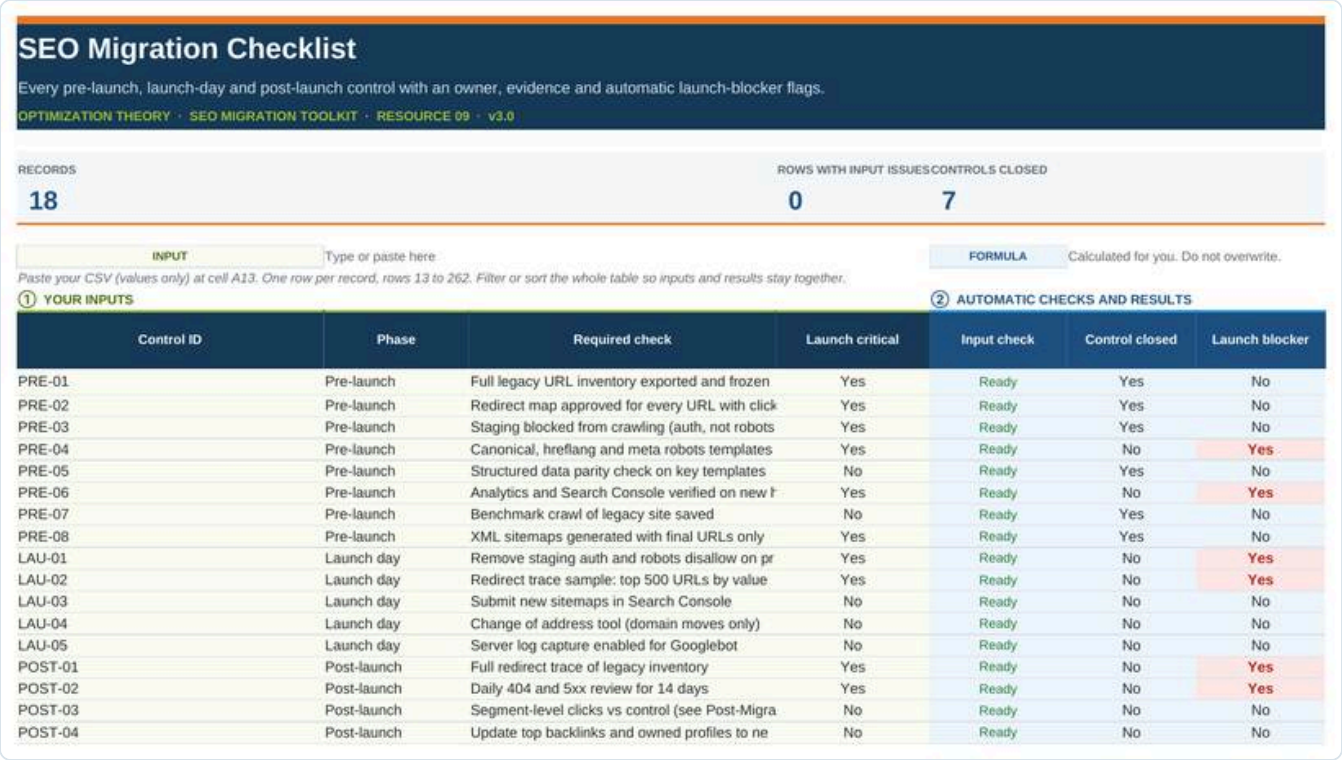
Close with evidence

Set status to Verified only with a link, file or screenshot in Evidence. Exceptions need an approver.

4

Hold the go/no-go on blockers

Launch when the Dashboard shows zero open launch blockers, or every remaining one has an approved exception.



SEO Migration Checklist

Every pre-launch, launch-day and post-launch control with an owner, evidence and automatic launch-blocker flags.

OPTIMIZATION THEORY · SEO MIGRATION TOOLKIT · RESOURCE 09 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	CONTROLS CLOSED
18	0	7

INPUT — Type or paste here

FORMULA — Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS ② AUTOMATIC CHECKS AND RESULTS

Control ID	Phase	Required check	Launch critical	Input check	Control closed	Launch blocker
PRE-01	Pre-launch	Full legacy URL inventory exported and frozen	Yes	Ready	Yes	No
PRE-02	Pre-launch	Redirect map approved for every URL with click	Yes	Ready	Yes	No
PRE-03	Pre-launch	Staging blocked from crawling (auth, not robots	Yes	Ready	Yes	No
PRE-04	Pre-launch	Canonical, hreflang and meta robots templates	Yes	Ready	No	Yes
PRE-05	Pre-launch	Structured data parity check on key templates	No	Ready	Yes	No
PRE-06	Pre-launch	Analytics and Search Console verified on new h	Yes	Ready	No	Yes
PRE-07	Pre-launch	Benchmark crawl of legacy site saved	No	Ready	Yes	No
PRE-08	Pre-launch	XML sitemaps generated with final URLs only	Yes	Ready	Yes	No
LAU-01	Launch day	Remove staging auth and robots disallow on pr	Yes	Ready	No	Yes
LAU-02	Launch day	Redirect trace sample: top 500 URLs by value	Yes	Ready	No	Yes
LAU-03	Launch day	Submit new sitemaps in Search Console	No	Ready	No	No
LAU-04	Launch day	Change of address tool (domain moves only)	No	Ready	No	No
LAU-05	Launch day	Server log capture enabled for Googlebot	No	Ready	No	No
POST-01	Post-launch	Full redirect trace of legacy inventory	Yes	Ready	No	Yes
POST-02	Post-launch	Daily 404 and 5xx review for 14 days	Yes	Ready	No	Yes
POST-03	Post-launch	Segment-level clicks vs control (see Post-Migra	No	Ready	No	No
POST-04	Post-launch	Update top backlinks and owned profiles to ne	No	Ready	No	No

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

This is a sign-off workflow. DataForSEO responses are the evidence you attach; the human checks stay manual by design.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 09 --csv --input my-filled.csv --output my
-inputs.csv
```

Fills automatically	You add
Source reference (audit trail)	Control ID, Phase, Required check, Launch critical, Status, Owner, Evidence URL, Exception approver

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

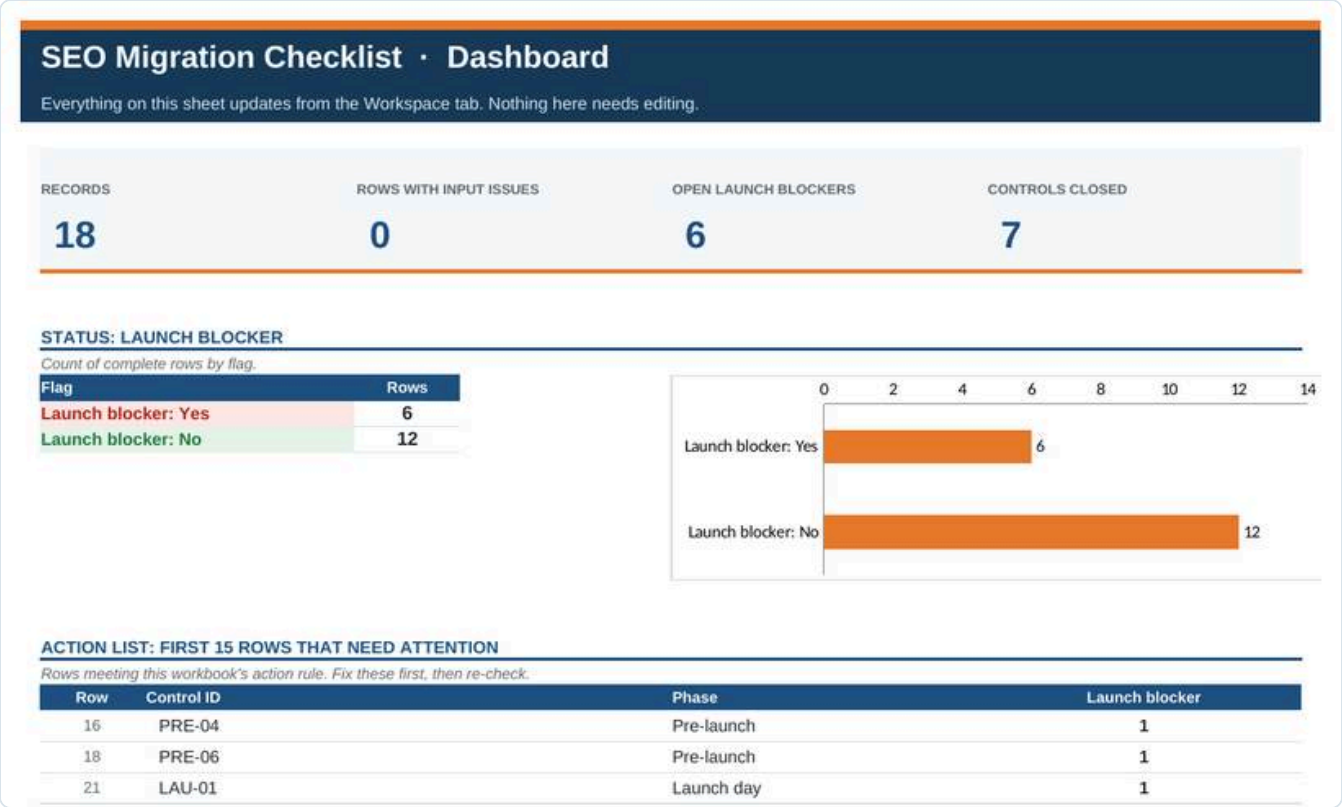
CSV field	Column	Meaning and rule	Typical source
`control_id`	Control ID	Stable identifier for a migration control.	Your records or manual review
`phase`	Phase	Discovery, Build, Prelaunch, Launch or Monitor.	Your records or manual review
`control`	Required check	The acceptance condition to verify.	Your records or manual review
`critical`	Launch critical	1 for a control that blocks launch unless an exception is explicitly approved. 1 = Yes, 0 = No.	Your records or manual review
`status`	Status	Not started, In progress, Verified or Exception.	Your records or manual review
`owner`	Owner	Person accountable for the next action.	Your records or manual review
`evidence`	Evidence URL	Dated proof of verification or an approved exception. Optional.	Your records or manual review
`exception_approver`	Exception approver	Named person accepting a documented exception. Optional.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 18 example rows.

18	0	6	7
Records	Rows with input issues	Open launch blockers	Controls closed

Six critical controls are still open in the example, including analytics verification on the new host and removing staging protection. That's a no-go until they're closed.



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

The launch decision still belongs to the accountable team. Open noncritical items remain visible even when critical blockers are closed.

Limits. This is an evidence workflow. DataForSEO provides crawl proof, while status, approvals, analytics, rollback and infrastructure checks need other systems.

Mistakes to avoid

Ticking without evidence. A checkmark isn't proof. The workbook won't count a control as closed without evidence.

Blocking crawlers on staging with robots.txt only. Robots.txt doesn't prevent indexing of linked URLs. Use authentication on staging.

Stopping at launch day. Post-launch controls catch most of the damage. Keep them in the checklist and assign them before launch.

Tips from the field

Run the go/no-go meeting from the Dashboard tab.

Link each control's evidence to the matching template: redirect QA, indexability review, sitemap audit.

Copy the workbook per environment if you launch in stages.

Questions people ask

What should an SEO migration checklist include?

URL inventory and redirect mapping, staging protection, template checks for canonicals, robots and hreflang, analytics and Search Console setup, sitemaps, launch-day redirect testing and post-launch monitoring.

What is a launch blocker?

A critical control that isn't closed. Launching with open blockers risks traffic loss that's hard to reverse.

Do I need the Change of Address tool?

Only for domain changes. For same-domain migrations, mark it as an exception with a reason.

How long should I monitor after a migration?

Watch daily for the first two weeks, weekly for three months, and keep redirects live for at least a year.

Templates that work well with this one

Site Migration URL Inventory Template

Inventory every legacy URL with its traffic, profit and links, assign a destination and catch risky retirements.

Redirect Mapping Template

Map every old URL to its new home and verify each redirect: one permanent hop, a 200 page, no noindex, matching canonical.

Post-Migration SEO Monitoring Template

Compare each migrated segment with an untouched control so you can tell real migration loss from seasonality.

Indexability Audit Template

Check status, robots, noindex and canonical on every page you want indexed, then see exactly what to fix first.

Hreflang Audit Template

Validate every hreflang relationship: alternate status, self-reference, return tags, canonical match and locale codes.

SEO Client Onboarding Checklist

Track every access, definition and baseline export a new SEO engagement needs, with owners and blockers.

Read the full tutorial online: **optimizationtheory.com/download-view/seo-migration-checklist/**
Get all six templates in the **SEO Migration Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

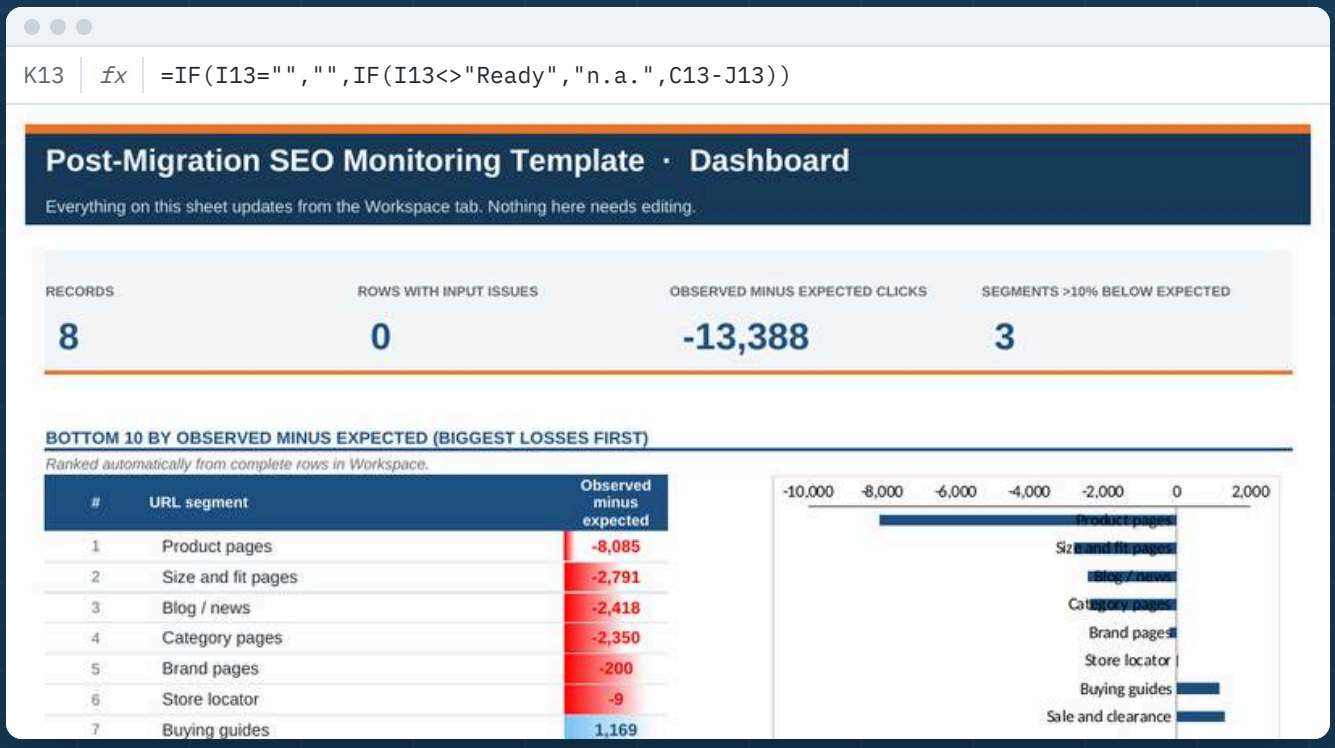
OptimizationTheory.com

SEO Migration Toolkit, resource 10

Post-Migration SEO Monitoring Template

Compare each migrated segment with an untouched control so you can tell real migration loss from seasonality.

Built for the DataForSEO API: Labs: Ranked Keywords



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Whether each migrated section is performing above or below what you'd expect after adjusting for market-wide changes, measured against a control segment that didn't move.

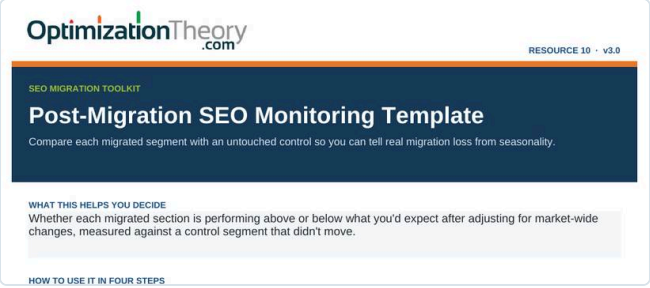
After a migration, everyone asks the same question: did we lose traffic because of the migration, or because it's January? Raw before-and-after comparisons can't answer it, because demand, algorithm updates and seasonality all move at the same time.

This post-migration monitoring template uses a control: a part of the site that didn't migrate. It scales each migrated segment's baseline by how much the control changed, giving a control-adjusted expected number. The difference between observed and expected clicks, and the relative gap, show which segments really lost ground.

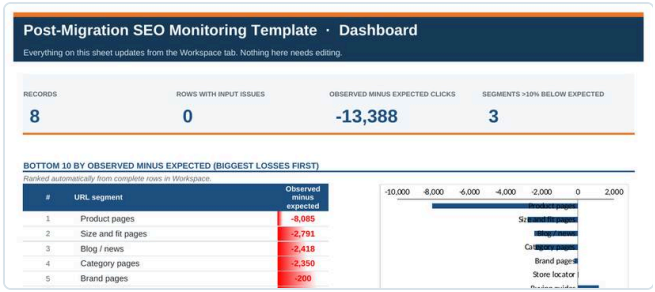
Who it's for

- SEOs reporting on migration impact
- Analysts separating migration effects from seasonality or updates
- Agencies that need a fair, defensible post-launch report
- Teams deciding whether to roll back or fix forward

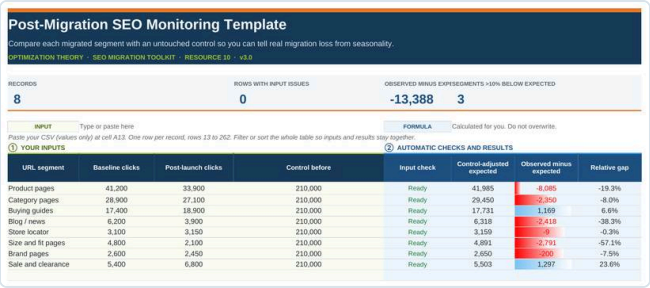
What's in the workbook



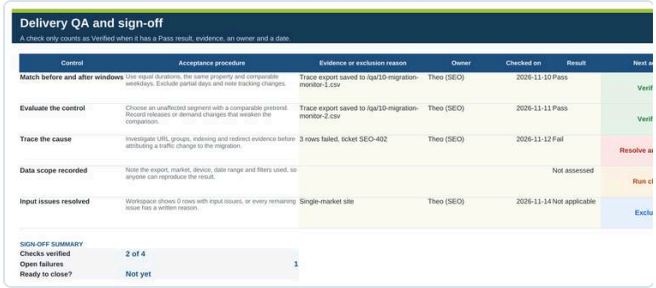
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Expected clicks = baseline clicks × (control after ÷ control before). Observed minus expected = post clicks – expected. Relative gap = post ÷ expected – 1. A segment at –18% lost 18% more than the control's movement would explain.

The key formula, as written in the workbook

```
=IF(I13="","",IF(I13<>"Ready","n.a.",C13-J13))
```

Result column	Plain-English formula	What it tells you
Control-adjusted expected	Baseline clicks × (Control after ÷ Control before)	Expected post clicks if the migrated segment followed the control trend.
Observed minus expected	Post-launch clicks-Control-adjusted expected	Negative values show underperformance relative to this control.
Relative gap	IF(Control-adjusted expected=0,"n.a.",Post-launch clicks ÷ Control-adjusted expected-1)	Relative deviation from control-adjusted expected clicks.

How to use it, step by step

1

Choose a control segment

Pick a section that didn't change (a help center, a subdomain, a subfolder) with stable traffic.

2

Pull equal periods

Export clicks for each migrated segment and the control for the same number of days before and after launch.

3

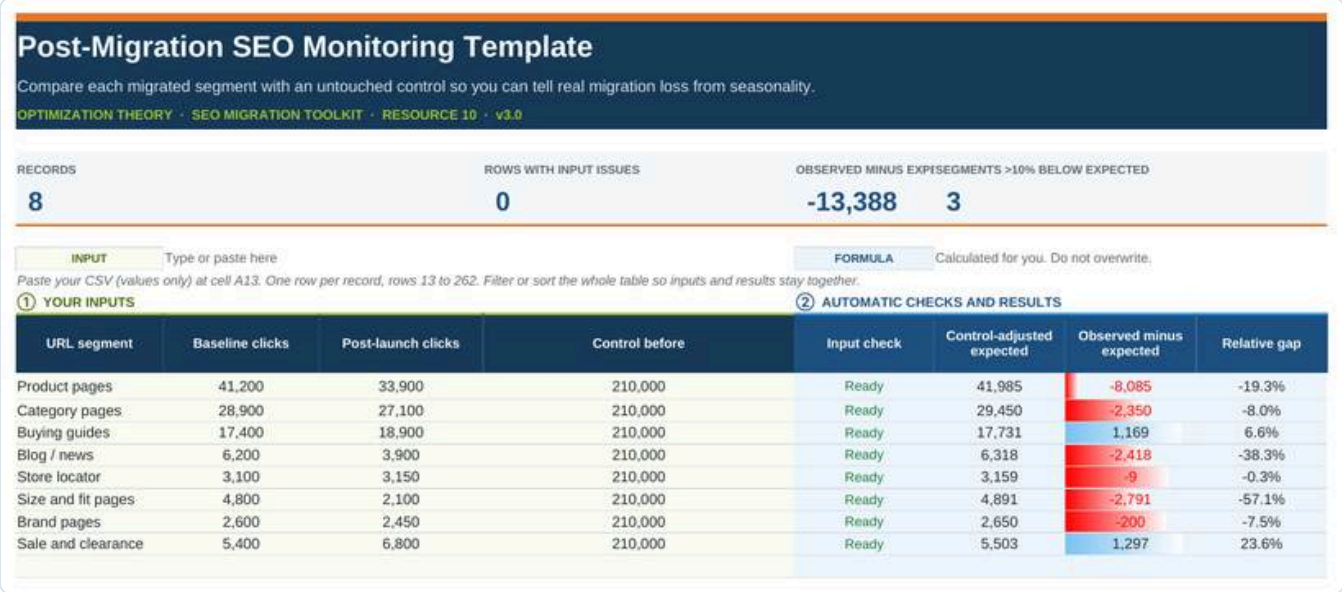
Enter segment rows

One row per segment: baseline clicks, post-launch clicks, control before and after, and the period lengths.

4

Investigate the biggest gaps

Segments more than 10% below expected appear on the Dashboard. Check redirects, indexation and templates for those first.



Post-Migration SEO Monitoring Template

Compare each migrated segment with an untouched control so you can tell real migration loss from seasonality.

OPTIMIZATION THEORY · SEO MIGRATION TOOLKIT · RESOURCE 10 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	OBSERVED MINUS EXPI	SEGMENTS >10% BELOW EXPECTED
8	0	-13,388	3

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

URL segment	Baseline clicks	Post-launch clicks	Control before	Input check	Control-adjusted expected	Observed minus expected	Relative gap
Product pages	41,200	33,900	210,000	Ready	41,985	-8,085	-19.3%
Category pages	28,900	27,100	210,000	Ready	29,450	-2,350	-8.0%
Buying guides	17,400	18,900	210,000	Ready	17,731	1,169	6.6%
Blog / news	6,200	3,900	210,000	Ready	6,318	-2,418	-38.3%
Store locator	3,100	3,150	210,000	Ready	3,159	-9	-0.3%
Size and fit pages	4,800	2,100	210,000	Ready	4,891	-2,791	-57.1%
Brand pages	2,600	2,450	210,000	Ready	2,650	-200	-7.5%
Sale and clearance	5,400	6,800	210,000	Ready	5,503	1,297	23.6%

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Ranked Keywords**: every keyword a domain ranks for, with its ranking URL, position and volume.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/ranked_keywords/live
[
  {
    "target": "yourdomain.com",
    "location_code": 2840,
    "language_code": "en",
    "limit": 1000
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 10 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Source reference (audit trail)	URL segment, Baseline clicks, Post-launch clicks, Control before, Control after, Baseline days, Post-launch days

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`segment`	URL segment	Named migrated URL group. Join API URLs to this group externally.	Your records or manual review
`baseline_clicks`	Baseline clicks	GSC clicks in a complete prelaunch window.	Your records or manual review
`post_clicks`	Post-launch clicks	GSC clicks in a complete postlaunch window of equal length.	Your records or manual review
`control_before`	Control before	Clicks for an unaffected matched group before launch.	Your records or manual review
`control_after`	Control after	Clicks for that control group after launch.	Your records or manual review
`baseline_days`	Baseline days	Number of complete days in the baseline window.	Your records or manual review
`post_days`	Post-launch days	Number of complete days in the postlaunch window.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 8 example rows.

8	0	-13,388	3
Records	Rows with input issues	Observed minus expected clicks	Segments >10% below expected

Size-and-fit pages, the blog and product pages are all well below expectation, while buying guides and sale pages beat it. That points the investigation at specific templates rather than the whole migration.

Bottom 10 by observed minus expected (biggest losses first)

#	URL segment	Observed minus expected
1	Product pages	-8,085
2	Size and fit pages	-2,791
3	Blog / news	-2,418
4	Category pages	-2,350
5	Brand pages	-200



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

The control adjustment separates one broad trend from the observed change. It is a diagnostic, not proof of a migration effect.

Limits. Controls can be affected by sitewide changes. Inspect country, device, holidays and query mix before acting.

Mistakes to avoid

Using a control that also changed. If the control moved too, the adjustment is meaningless. Pick something truly untouched.

Comparing unequal periods. Use the same number of days before and after, and the same weekdays where possible.

Reading week one as the verdict. Rankings fluctuate after a move. Read the trend over four to eight weeks.

Tips from the field

Pair with the redirect QA results: segments with failed redirects usually explain the gap.

Use the migration URL inventory's daily baselines for page-level checks.

Re-run weekly and keep each week's sheet for the trend.

Questions people ask

How do I measure SEO impact after a migration?

Compare each migrated segment's clicks against what a stable control segment predicts. This separates migration effects from seasonality and market changes.

What's a control group in SEO?

A set of pages that weren't changed, used as a baseline for how traffic would have moved anyway.

How long does traffic take to recover after a migration?

Well-executed migrations often stabilize within weeks; complex ones can take months. Persistent gaps usually trace back to redirect or indexing problems.

What if I have no control segment?

Use the same period last year as a rough seasonality adjustment, and note the weaker evidence in Source reference.

Templates that work well with this one

Site Migration URL Inventory Template

Inventory every legacy URL with its traffic, profit and links, assign a destination and catch risky retirements.

Redirect Mapping Template

Map every old URL to its new home and verify each redirect: one permanent hop, a 200 page, no noindex, matching canonical.

SEO Migration Checklist

Every pre-launch, launch-day and post-launch control with an owner, evidence and automatic launch-blocker flags.

SEO Split Test Calculator

Estimate ratio-adjusted lift and difference-in-differences against matched control pages, with a pre-trend check.

SEO Visibility Score Calculator

Weight rankings by search volume and CTR to see real visibility gains and losses across a fixed keyword set.

Content Decay Analysis Template

Separate lost impressions, lower CTR and falling demand, so you refresh the pages that really decayed.

Read the full tutorial online: **optimizationtheory.com/download-view/post-migration-seo-monitoring/**
Get all six templates in the **SEO Migration Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

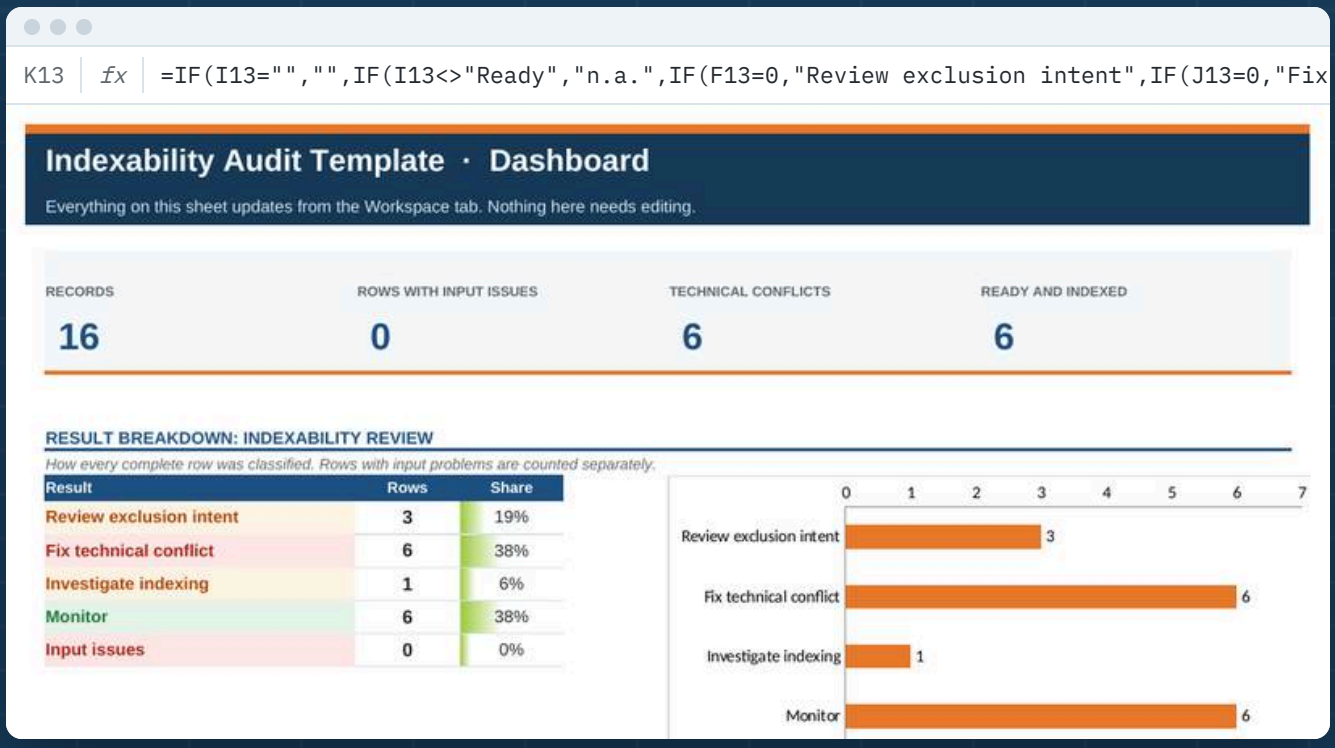
OptimizationTheory.com

SEO Migration Toolkit, resource 11

Indexability Audit Template

Check status, robots, noindex and canonical on every page you want indexed, then see exactly what to fix first.

Built for the DataForSEO API: On-Page API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which pages that should be indexed have a technical conflict, which are technically fine but still not indexed, and which were never meant to be indexed.

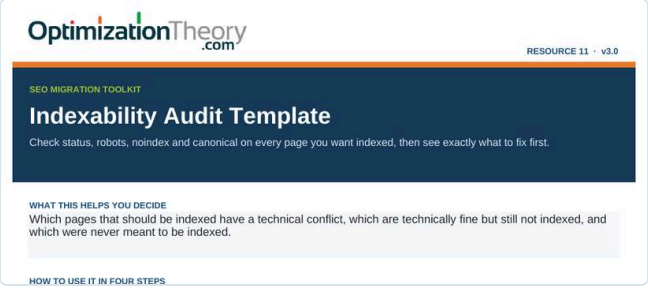
'Crawled, currently not indexed' and 'Duplicate, Google chose a different canonical' are some of the most common Search Console complaints, and some of the hardest to triage at scale. The cause is often mundane: a non-200 status, a robots block, a stray noindex or a canonical pointing somewhere else.

This indexability audit template checks each URL for those four conditions and compares the result with your intent and Search Console's indexing status. It sorts every row into one of four actions: Fix technical conflict, Investigate indexing, Review exclusion intent, or Monitor.

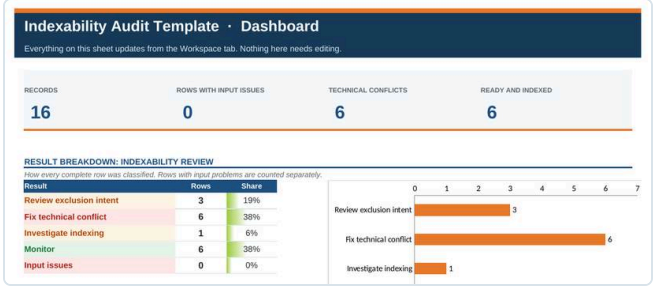
Who it's for

- SEOs triaging Search Console indexing reports
- Developers verifying templates after a release
- Migration teams checking the new site before and after launch
- Ecommerce teams with faceted or paginated URLs

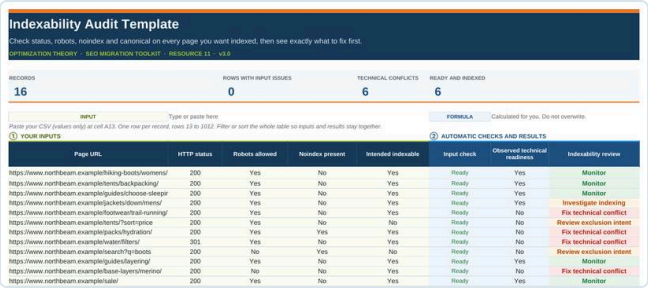
What's in the workbook



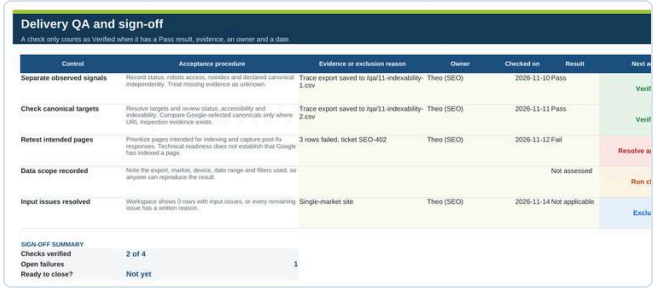
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 1,000 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Technical readiness = 1 when status is 200, robots allows crawling, noindex is 0 and the canonical equals the URL. The review returns Review exclusion intent when you don't intend to index the page, Fix technical conflict when it isn't technically ready, Investigate indexing when it's ready but not indexed, otherwise Monitor.

The key formula, as written in the workbook

```
=IF(I13="","",IF(I13<>"Ready","n.a.",IF(F13=0,"Review exclusion intent",IF(J13=0,"Fix technical conflict",IF(G13=0,"Investigate indexing","Monitor")))))
```

Result column	Plain-English formula	What it tells you
Observed technical readiness	IF(AND(HTTP status=200,Robots allowed=1,Noindex present=0,Declared canonical=Page URL),1,0)	Observed self-canonical 200 without known crawling/indexing block.
Indexability review	IF(Intended indexable=0,"Review exclusion intent",IF(Observed technical readiness=0,"Fix technical conflict",IF(GSC indexed=0,"Investigate indexing","Monitor")))	Keeps actual GSC indexing separate from crawl readiness.

The results you'll see

Review exclusion intent | Fix technical conflict | Investigate indexing | Monitor

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

List URLs and your intent

Include pages you want indexed and the ones you don't. Mark intended indexable as 1 or 0.

2

Crawl for technical signals

Record status code, whether robots.txt allows crawling, whether the page has noindex, and its canonical URL.

3

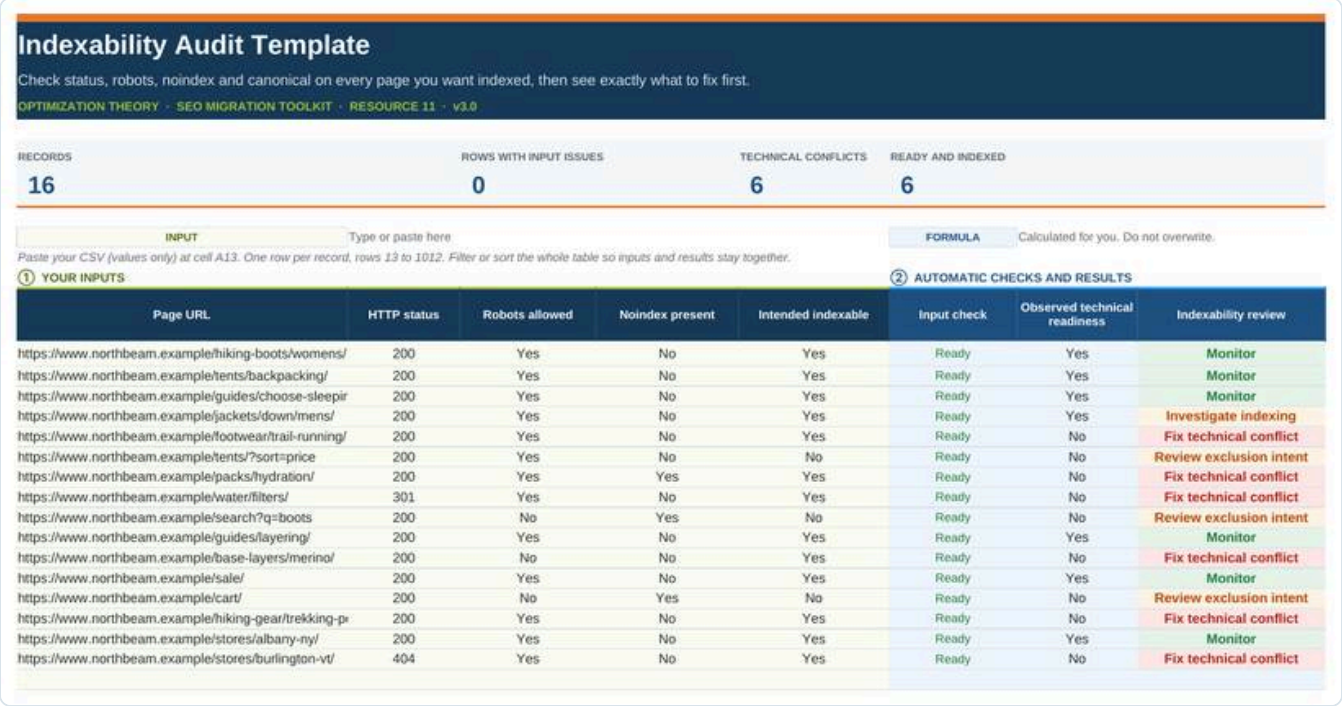
Add indexing status

Use URL Inspection or the page indexing report to record whether Google has indexed the URL (1/0).

4

Work the queue in order

Fix technical conflicts first, then investigate indexing on technically ready pages, then confirm exclusions.



Indexability Audit Template

Check status, robots, noindex and canonical on every page you want indexed, then see exactly what to fix first.

OPTIMIZATION THEORY · SEO MIGRATION TOOLKIT · RESOURCE 11 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	TECHNICAL CONFLICTS	READY AND INDEXED
16	0	6	6

INPUT — Type or paste here

FORMULA — Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 1012. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS ② AUTOMATIC CHECKS AND RESULTS

Page URL	HTTP status	Robots allowed	Noindex present	Intended indexable	Input check	Observed technical readiness	Indexability review
https://www.northbeam.example/hiking-boots/womens/	200	Yes	No	Yes	Ready	Yes	Monitor
https://www.northbeam.example/tents/backpacking/	200	Yes	No	Yes	Ready	Yes	Monitor
https://www.northbeam.example/guides/choose-sleepir	200	Yes	No	Yes	Ready	Yes	Monitor
https://www.northbeam.example/jackets/down/mens/	200	Yes	No	Yes	Ready	Yes	Investigate indexing
https://www.northbeam.example/footwear/trail-running/	200	Yes	No	Yes	Ready	No	Fix technical conflict
https://www.northbeam.example/tents/?sort=price	200	Yes	No	No	Ready	No	Review exclusion intent
https://www.northbeam.example/packs/hydration/	200	Yes	Yes	Yes	Ready	No	Fix technical conflict
https://www.northbeam.example/water/filters/	301	Yes	No	Yes	Ready	No	Fix technical conflict
https://www.northbeam.example/search?q=boots	200	No	Yes	No	Ready	No	Review exclusion intent
https://www.northbeam.example/guides/layering/	200	Yes	No	Yes	Ready	Yes	Monitor
https://www.northbeam.example/base-layers/merino/	200	No	No	Yes	Ready	No	Fix technical conflict
https://www.northbeam.example/sale/	200	Yes	No	Yes	Ready	Yes	Monitor
https://www.northbeam.example/cart/	200	No	Yes	No	Ready	No	Review exclusion intent
https://www.northbeam.example/hiking-gear/trekking-p	200	Yes	No	Yes	Ready	No	Fix technical conflict
https://www.northbeam.example/stores/albany-ny/	200	Yes	No	Yes	Ready	Yes	Monitor
https://www.northbeam.example/stores/burlington-vt/	404	Yes	No	Yes	Ready	No	Fix technical conflict

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 11 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Page URL, HTTP status, Declared canonical	Robots allowed, Noindex present, Intended indexable, GSC indexed

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`url`	Page URL	Exact absolute URL. Keep case and query parameters unless a documented normalization rule applies.	DataForSEO: url
`status_code`	HTTP status	Observed crawl status.	DataForSEO: status_code
`robots_allowed`	Robots allowed	1 only after robots.txt permits crawling for the intended bot. 1 = Yes, 0 = No.	Your records or manual review
`noindex`	Noindex present	1 if a noindex directive is present in rendered meta or HTTP header. 1 = Yes, 0 = No.	Your records or manual review
`canonical_url`	Declared canonical	Exact resolved declared canonical URL. Enter MISSING if absent.	DataForSEO: canonical_url
`intended_indexable`	Intended indexable	1 when the approved strategy intends this URL to be indexed. 1 = Yes, 0 = No.	Your records or manual review
`gsc_indexed`	GSC indexed	1 only when inspected in GSC and reported indexed. Enter 0 for checked and not indexed. 1 = Yes, 0 = No.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

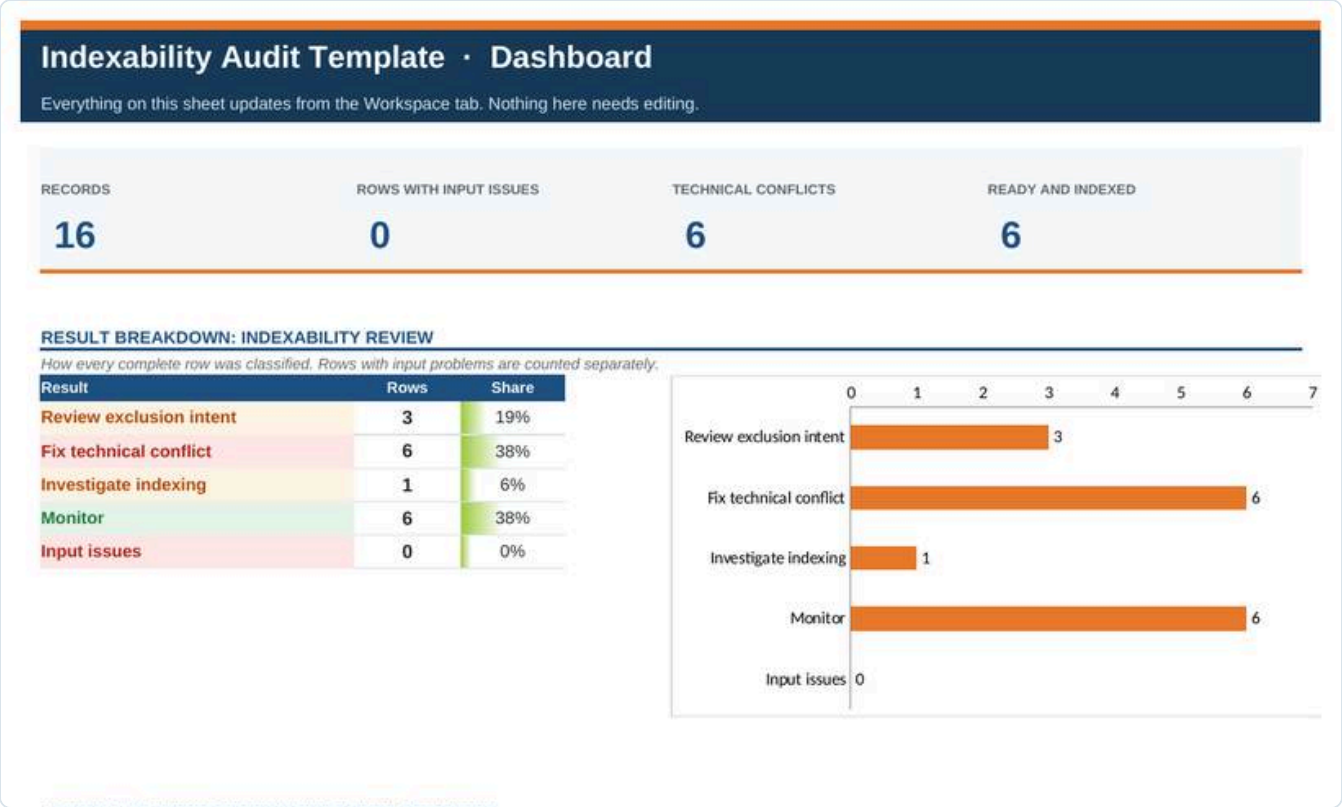
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 16 example rows.

16	0	6	6
Records	Rows with input issues	Technical conflicts	Ready and indexed

Six example URLs have technical conflicts: a canonical pointing at ?page=1, a stray noindex, a 301, a robots-blocked category, a canonical to a parent folder and a closed store that 404s. One more page is technically clean but not indexed, which is a quality or demand question, not a tag problem.

Result breakdown

Result	Rows	Share
Review exclusion intent	3	19%
Fix technical conflict	6	38%
Investigate indexing	1	6%
Monitor	6	38%
Input issues	0	0%



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

A ready crawl response does not prove Google selected this canonical or indexed the page.

Limits. Robots blocking can prevent a crawler from seeing noindex. Blank inspection data stays missing, not an assumed zero.

Mistakes to avoid

Fixing 'not indexed' with a request indexing click. If the page has a technical conflict, requesting indexing won't help. Fix the signal first.

Canonicalizing to URLs with parameters. Canonicals should point at the clean, indexable URL. Parameter canonicals usually signal a template bug.

Blocking pages you want deindexed. If robots.txt blocks a page, Google can't see its noindex. Allow crawling until it drops out, then block if needed.

Tips from the field

Run this on a template sample after every release.

Combine with the sitemap audit: URLs in the sitemap should all be technically ready.

Investigate indexing rows often need better content, internal links or consolidation, not more tags.

Questions people ask

What is indexability in SEO?

Whether a page can be crawled and indexed: it returns 200, isn't blocked by robots.txt, has no noindex directive and declares itself (or no other page) as canonical.

Why is my page crawled but not indexed?

Usually because Google doesn't find it valuable or distinct enough, or because it's a near-duplicate of another URL. Technical conflicts should be ruled out first, which this template does.

Does a canonical tag guarantee which URL is indexed?

No. It's a strong hint. Google may choose another canonical if signals conflict.

Should robots.txt be used to remove pages from Google?

No. Use noindex and allow crawling so Google can see it. Robots.txt controls crawling, not indexing.

Templates that work well with this one

XML Sitemap Audit Template

Reconcile sitemap URLs against status, canonical, robots and noindex to see what to add, remove or fix.

Hreflang Audit Template

Validate every hreflang relationship: alternate status, self-reference, return tags, canonical match and locale codes.

Redirect Mapping Template

Map every old URL to its new home and verify each redirect: one permanent hop, a 200 page, no noindex, matching canonical.

Crawl Budget Analysis Template

Group verified Googlebot requests by URL pattern, measure crawl waste and pick the right fix for each pattern.

Schema Markup Audit Template

Check presence, syntax, required fields, visible-content match and policy for every structured data type you ship.

Technical SEO Prioritization Template

Turn a technical SEO audit into a ranked fix queue by recovered clicks, profit and profit per hour of dev time.

Read the full tutorial online: **optimizationtheory.com/download-view/indexability-audit-template/**
Get all six templates in the **SEO Migration Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

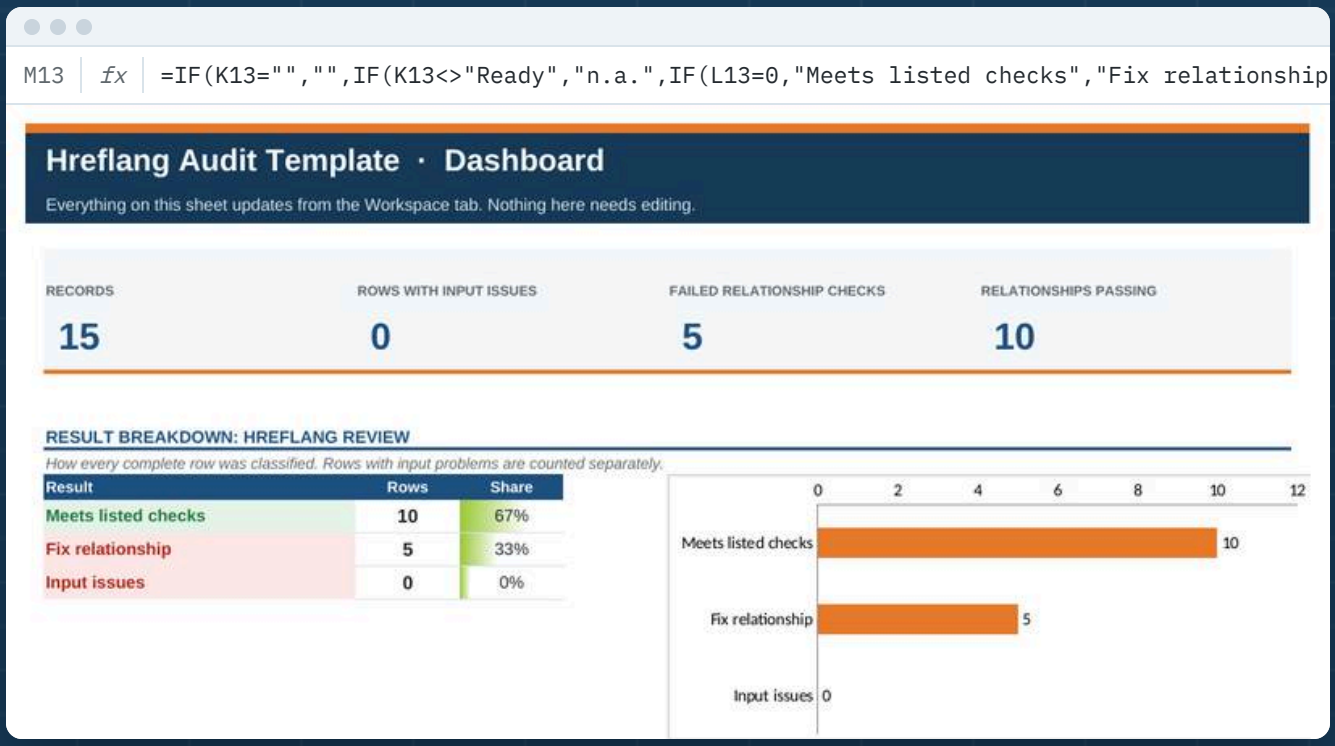
OptimizationTheory.com

SEO Migration Toolkit, resource 12

Hreflang Audit Template

Validate every hreflang relationship: alternate status, self-reference, return tags, canonical match and locale codes.

Built for the DataForSEO API: On-Page API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which hreflang relationships pass every check and which need fixing, with the number of failed checks per alternate.

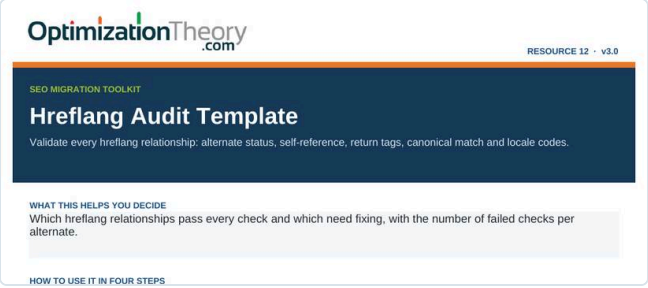
Hreflang has a reputation for being fragile, and it earns it. One missing return tag, one alternate that 404s, or one 'en-uk' instead of 'en-gb' and Google ignores the annotation for that pair. Large international sites can have thousands of these relationships, and they break quietly.

This hreflang audit template checks each URL and alternate pair for five conditions: the alternate returns 200, the page references itself, the alternate links back (reciprocal), the canonicals agree, and the locale code is valid. It counts failed checks and marks each relationship Meets listed checks or Fix relationship.

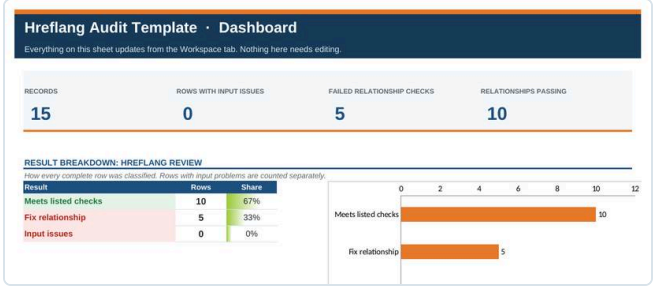
Who it's for

- International SEOs managing multiple locales
- Developers implementing hreflang in templates or sitemaps
- Teams launching a new market or language
- Migrations that change international URL structure

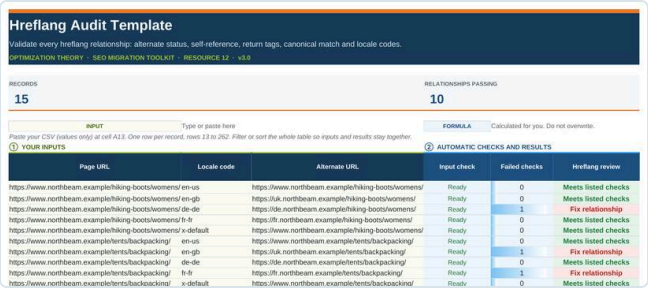
What's in the workbook



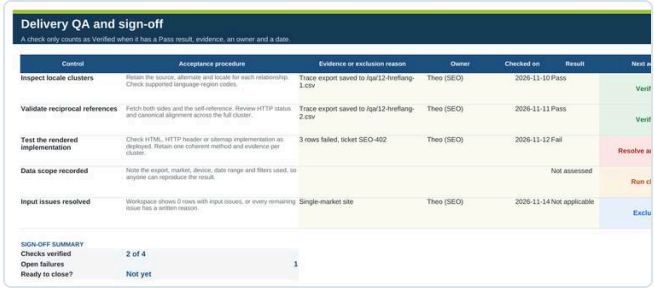
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Failed checks = 1 if the alternate isn't 200, plus 1 for each of: missing self-reference, missing return tag, canonical mismatch, invalid locale. Zero failures = Meets listed checks.

The key formula, as written in the workbook

```
=IF(K13="","",IF(K13<>"Ready","n.a.",IF(L13=0,"Meets listed checks","Fix relationship")))
```

Result column	Plain-English formula	What it tells you
Failed checks	IF(Alternate status=200,0,1)+(1-Self-reference verified)+(1-Reciprocal verified)+(1-Canonical aligned)+(1-Locale valid)	Count of the five reviewed acceptance checks that fail.
Hreflang review	IF(Failed checks=0,"Meets listed checks","Fix relationship")	Evidence-backed QA status for this directed page pair.

The results you'll see

Meets listed checks Fix relationship

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Export hreflang annotations

Crawl your site and export each page with its declared alternates and locale codes, from HTML, headers or sitemaps.

2

Add one row per relationship

Each row is one page and one alternate, with the alternate's status code.

3

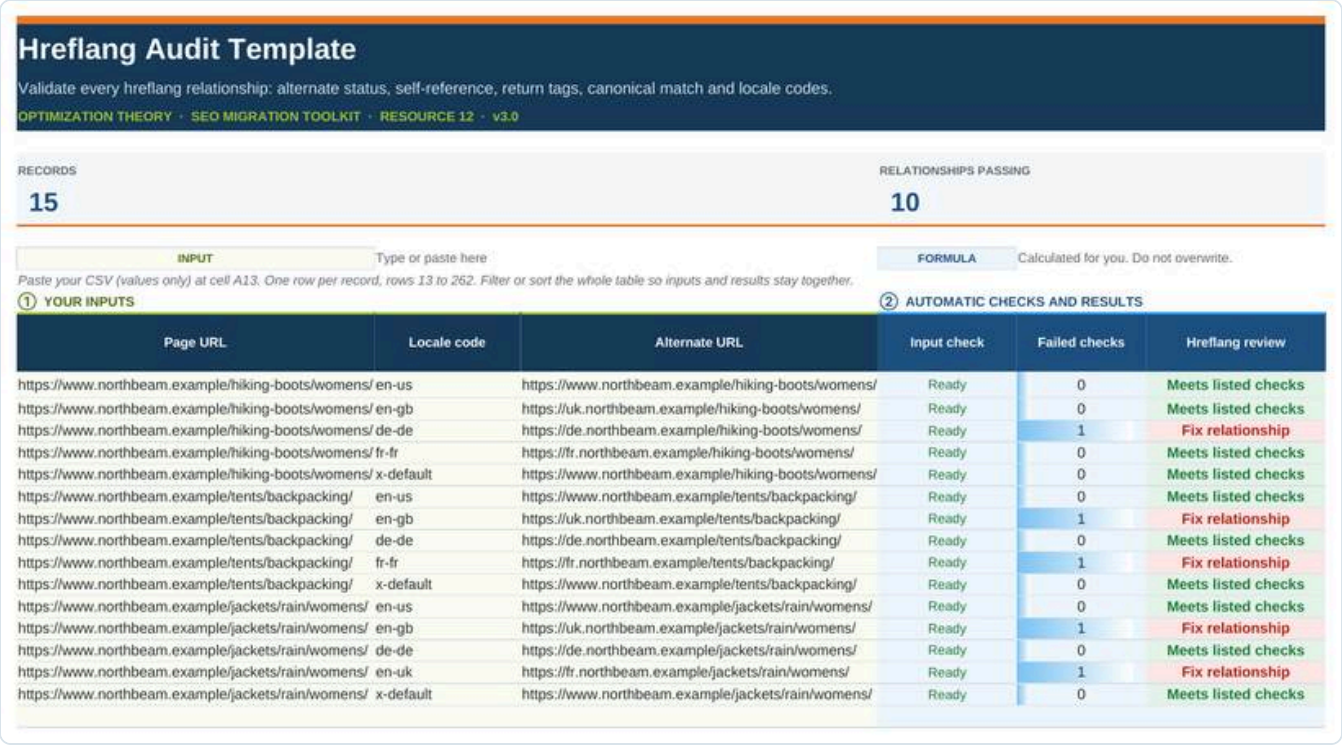
Score the five checks

Mark self-reference, reciprocal, canonical match and locale valid as 1 or 0. Use the dropdown for common codes.

4

Fix by pattern

Failures usually repeat by template or locale. Fix the template, then re-crawl.



Hreflang Audit Template

Validate every hreflang relationship: alternate status, self-reference, return tags, canonical match and locale codes.

OPTIMIZATION THEORY · SEO MIGRATION TOOLKIT · RESOURCE 12 · v3.0

RECORDS 15

RELATIONSHIPS PASSING 10

INPUT Type or paste here

FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS

② AUTOMATIC CHECKS AND RESULTS

Page URL	Locale code	Alternate URL	Input check	Failed checks	Hreflang review
https://www.northbeam.example/hiking-boots/womens/	en-us	https://www.northbeam.example/hiking-boots/womens/	Ready	0	Meets listed checks
https://www.northbeam.example/hiking-boots/womens/	en-gb	https://uk.northbeam.example/hiking-boots/womens/	Ready	0	Meets listed checks
https://www.northbeam.example/hiking-boots/womens/	de-de	https://de.northbeam.example/hiking-boots/womens/	Ready	1	Fix relationship
https://www.northbeam.example/hiking-boots/womens/	fr-fr	https://fr.northbeam.example/hiking-boots/womens/	Ready	0	Meets listed checks
https://www.northbeam.example/hiking-boots/womens/	x-default	https://www.northbeam.example/hiking-boots/womens/	Ready	0	Meets listed checks
https://www.northbeam.example/tents/backpacking/	en-us	https://www.northbeam.example/tents/backpacking/	Ready	0	Meets listed checks
https://www.northbeam.example/tents/backpacking/	en-gb	https://uk.northbeam.example/tents/backpacking/	Ready	1	Fix relationship
https://www.northbeam.example/tents/backpacking/	de-de	https://de.northbeam.example/tents/backpacking/	Ready	0	Meets listed checks
https://www.northbeam.example/tents/backpacking/	fr-fr	https://fr.northbeam.example/tents/backpacking/	Ready	1	Fix relationship
https://www.northbeam.example/tents/backpacking/	x-default	https://www.northbeam.example/tents/backpacking/	Ready	0	Meets listed checks
https://www.northbeam.example/jackets/rain/womens/	en-us	https://www.northbeam.example/jackets/rain/womens/	Ready	0	Meets listed checks
https://www.northbeam.example/jackets/rain/womens/	en-gb	https://uk.northbeam.example/jackets/rain/womens/	Ready	1	Fix relationship
https://www.northbeam.example/jackets/rain/womens/	de-de	https://de.northbeam.example/jackets/rain/womens/	Ready	0	Meets listed checks
https://www.northbeam.example/jackets/rain/womens/	en-uk	https://fr.northbeam.example/jackets/rain/womens/	Ready	1	Fix relationship
https://www.northbeam.example/jackets/rain/womens/	x-default	https://www.northbeam.example/jackets/rain/womens/	Ready	0	Meets listed checks

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

This is a sign-off workflow. DataForSEO responses are the evidence you attach; the human checks stay manual by design.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 12 --csv --input my-filled.csv --output my
-inputs.csv
```

Fills automatically	You add
Page URL	Locale code, Alternate URL, Alternate status, Self-reference verified, Reciprocal verified, Canonical aligned, Locale valid, Evidence

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`url`	Page URL	Exact absolute URL. Keep case and query parameters unless a documented normalization rule applies.	DataForSEO: url
`locale`	Locale code	Language or language-region code reviewed against the implementation spec.	Your records or manual review
`alternate_url`	Alternate URL	Absolute alternate URL extracted from hreflang markup.	Your records or manual review
`alternate_status`	Alternate status	HTTP response at the alternate URL.	Your records or manual review
`self_reference`	Self-reference verified	1 when the page includes the required self-reference. 1 = Yes, 0 = No.	Your records or manual review
`reciprocal`	Reciprocal verified	1 after checking the alternate links back to this page. 1 = Yes, 0 = No.	Your records or manual review
`canonical_match`	Canonical aligned	1 after verifying canonical choices do not conflict with the hreflang relationship. 1 = Yes, 0 = No.	Your records or manual review
`locale_valid`	Locale valid	1 only after validating the actual locale code and page language. 1 = Yes, 0 = No.	Your records or manual review
`evidence`	Evidence	Link to a dated crawl, screenshot, ticket or source that another reviewer can inspect.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

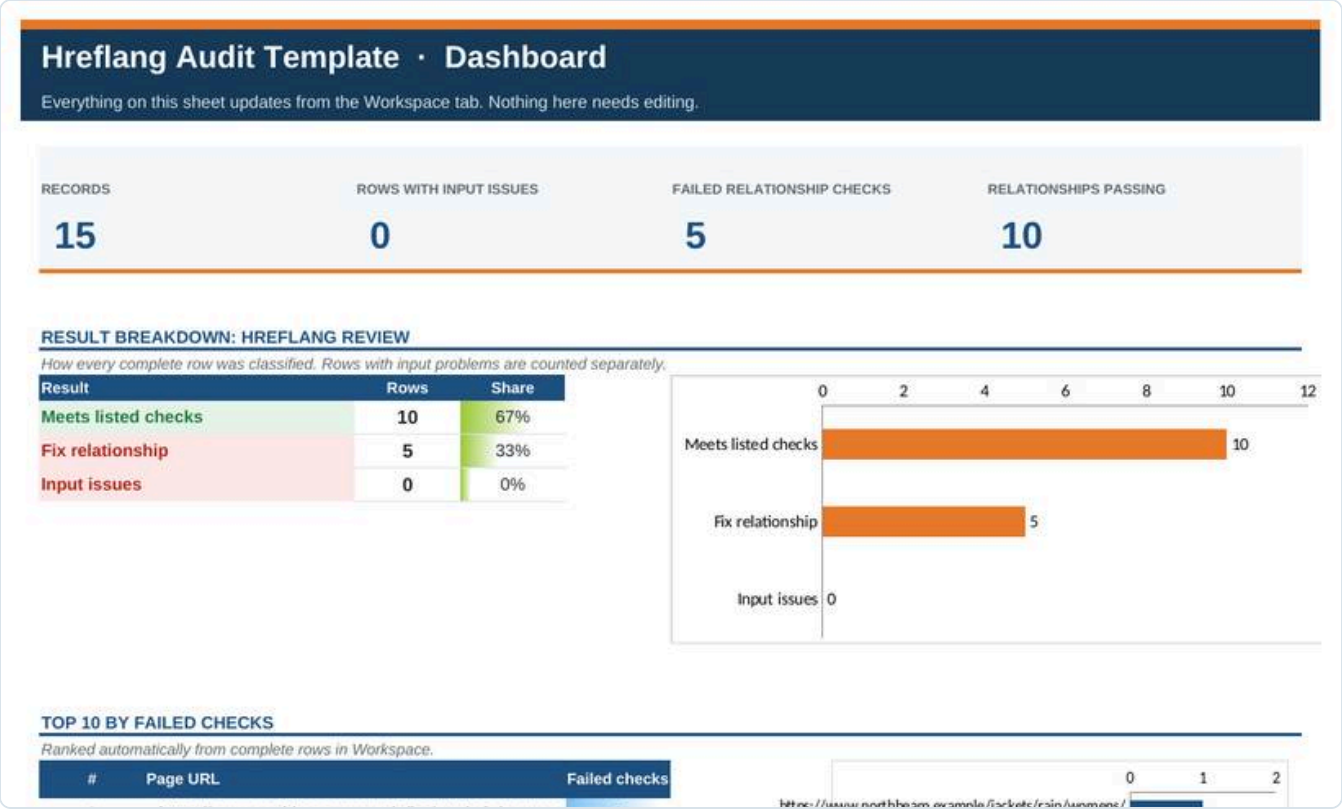
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 15 example rows.

15	0	5	10
Records	Rows with input issues	Failed relationship checks	Relationships passing

Five of 15 example relationships fail, and they fail in the classic ways: a German page missing its return tag, a UK URL that was renamed and now 404s, a French canonical pointing to English, and the invalid code en-uk.

Top 10 by failed checks

#	Page URL	Failed checks
1	https://www.northbeam.example/jackets/rain/womens/	1
2	https://www.northbeam.example/jackets/rain/womens/	1
3	https://www.northbeam.example/tents/backpacking/	1
4	https://www.northbeam.example/tents/backpacking/	1
5	https://www.northbeam.example/hiking-boots/womens/	1



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Use one row per directed alternate relationship. Validate every member of a locale cluster.

Limits. The starter importer enriches page URLs. It does not extract or infer hreflang tags, return links or language correctness.

Mistakes to avoid

Using en-uk. The ISO region code for the United Kingdom is GB. en-uk is invalid and ignored.

Canonicalizing every locale to one version. If the French page canonicals to English, Google drops the French page and its hreflang.

Forgetting x-default. x-default tells Google which page to show when no locale matches. It's optional but recommended.

Tips from the field

Pick one implementation method (HTML, header or sitemap) per page type; mixing causes conflicts.

Validate after every locale launch, not just once.

Include hreflang checks in the migration checklist.

Questions people ask

What are hreflang return tags?

Each page in a hreflang set must link to every alternate, and each alternate must link back. Without the return link, Google may ignore the pair.

What is the correct hreflang code for the UK?

en-gb. Language codes are ISO 639-1 and region codes are ISO 3166-1 Alpha 2.

Does hreflang need a self-referencing tag?

Yes. Each page should include itself in its own hreflang set.

Is hreflang a ranking factor?

No. It helps Google show the right language or regional version; it doesn't boost rankings on its own.

Templates that work well with this one

Indexability Audit Template

Check status, robots, noindex and canonical on every page you want indexed, then see exactly what to fix first.

XML Sitemap Audit Template

Reconcile sitemap URLs against status, canonical, robots and noindex to see what to add, remove or fix.

Redirect Mapping Template

Map every old URL to its new home and verify each redirect: one permanent hop, a 200 page, no noindex, matching canonical.

SEO Migration Checklist

Every pre-launch, launch-day and post-launch control with an owner, evidence and automatic launch-blocker flags.

Brand Entity Consistency Audit

Compare your official brand facts with Wikidata, LinkedIn, GBP, Yelp and more, and log every correction request.

Schema Markup Audit Template

Check presence, syntax, required fields, visible-content match and policy for every structured data type you ship.

Read the full tutorial online: **optimizationtheory.com/download-view/hreflang-audit-template/**
Get all six templates in the **SEO Migration Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

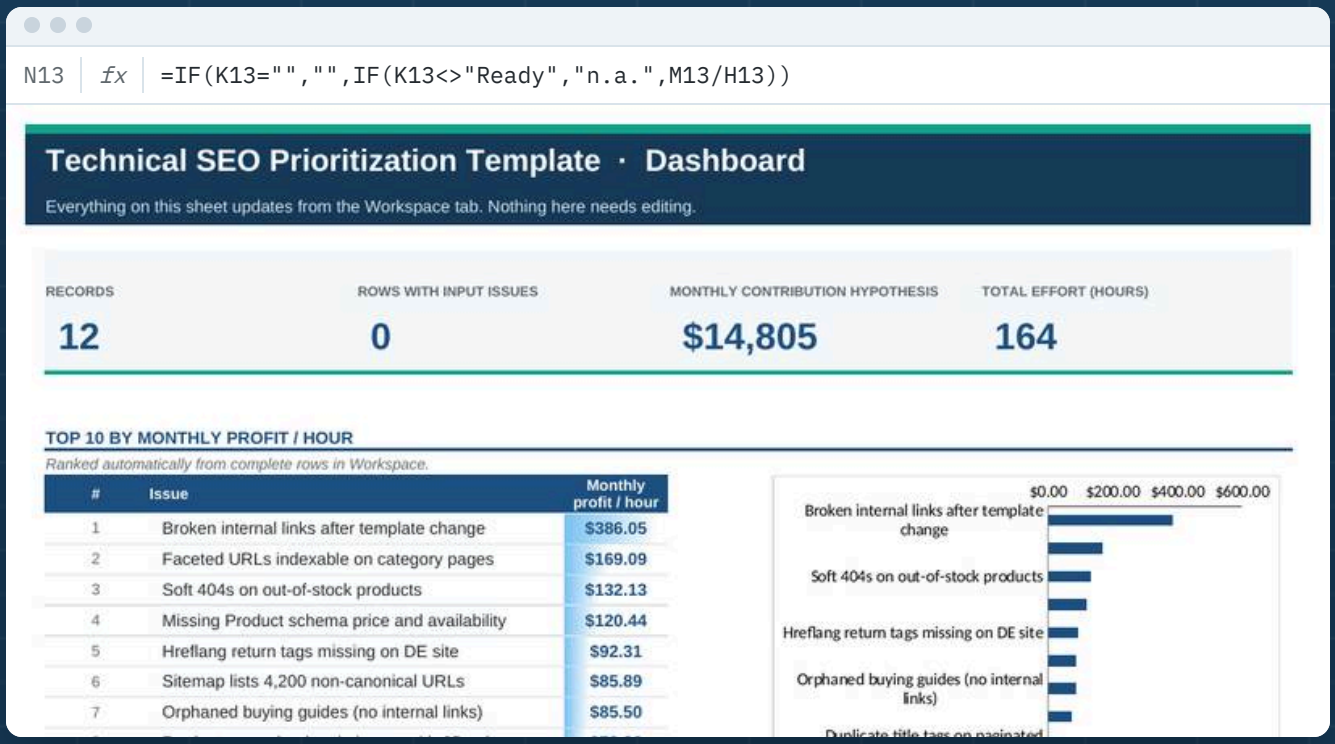
OptimizationTheory.com

Technical SEO Toolkit, resource 13

Technical SEO Prioritization Template

Turn a technical SEO audit into a ranked fix queue by recovered clicks, profit and profit per hour of dev time.

Built for the DataForSEO API: On-Page API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which technical issues to fix first, ranked by an explicit estimate of recoverable clicks and monthly profit per hour of effort.

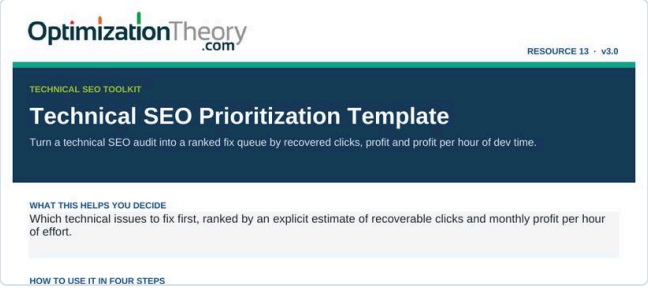
A technical SEO audit tool will happily give you 400 issues. A development team will give you about 20 hours a sprint. The gap between those two numbers is where most technical SEO programs stall, because 'high priority' labels from a crawler don't translate into business cases.

This technical SEO audit template converts each issue into a planning estimate. You enter the monthly clicks on affected pages, what share is affected, how much is recoverable, your confidence, conversion rate, value and hours. It calculates recoverable clicks, monthly profit opportunity and profit per hour, and ranks the queue so the dev team works on what matters.

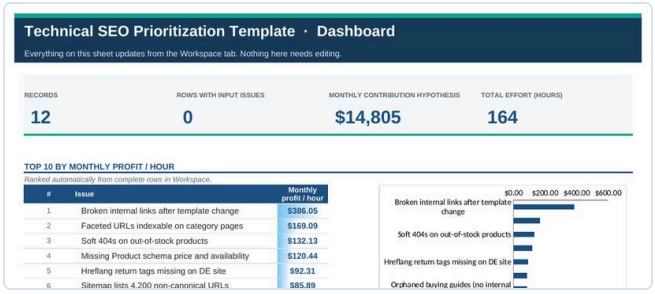
Who it's for

- Technical SEOs presenting audit findings to developers
- Product managers allocating sprint capacity
- In-house SEOs justifying engineering time
- Agencies turning an audit into a statement of work

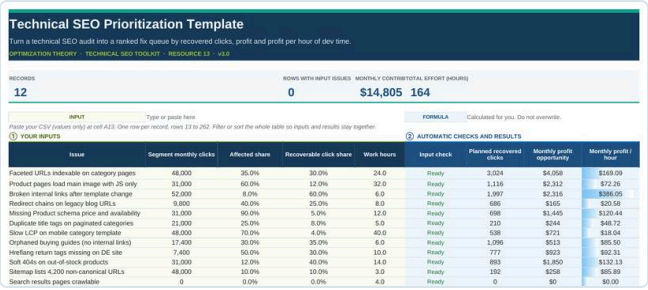
What's in the workbook



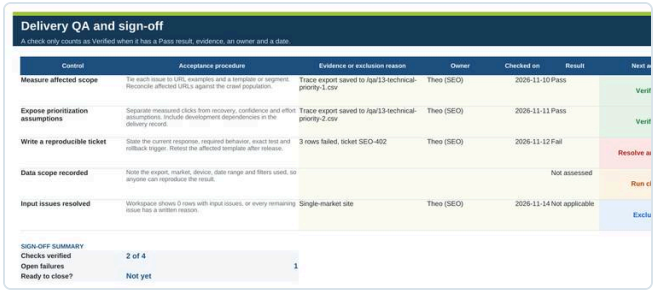
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Planned recovered clicks = monthly clicks × affected share × recoverable share × confidence. Monthly profit = recovered clicks × conversion rate × value per conversion. Profit per hour = monthly profit ÷ effort hours.

The key formula, as written in the workbook

```
=IF(K13="","",IF(K13<>"Ready","n.a.",M13/H13))
```

Result column	Plain-English formula	What it tells you
Planned recovered clicks	Segment monthly clicks × Affected share × Recoverable click share × Confidence factor	Conditional estimate under the recorded impact assumptions.
Monthly profit opportunity	Planned recovered clicks × Conversion rate × Value per conversion	Modeled recovered contribution per month.
Monthly profit / hour	Monthly profit opportunity ÷ Work hours	Comparable planning metric for the listed fixes.

How to use it, step by step

1

List issues, not symptoms

Group crawler warnings into fixable issues with one owner each (e.g. 'faceted URLs indexable on category pages').

2

Size the affected traffic

Enter monthly clicks for the affected page group and the share actually affected.

3

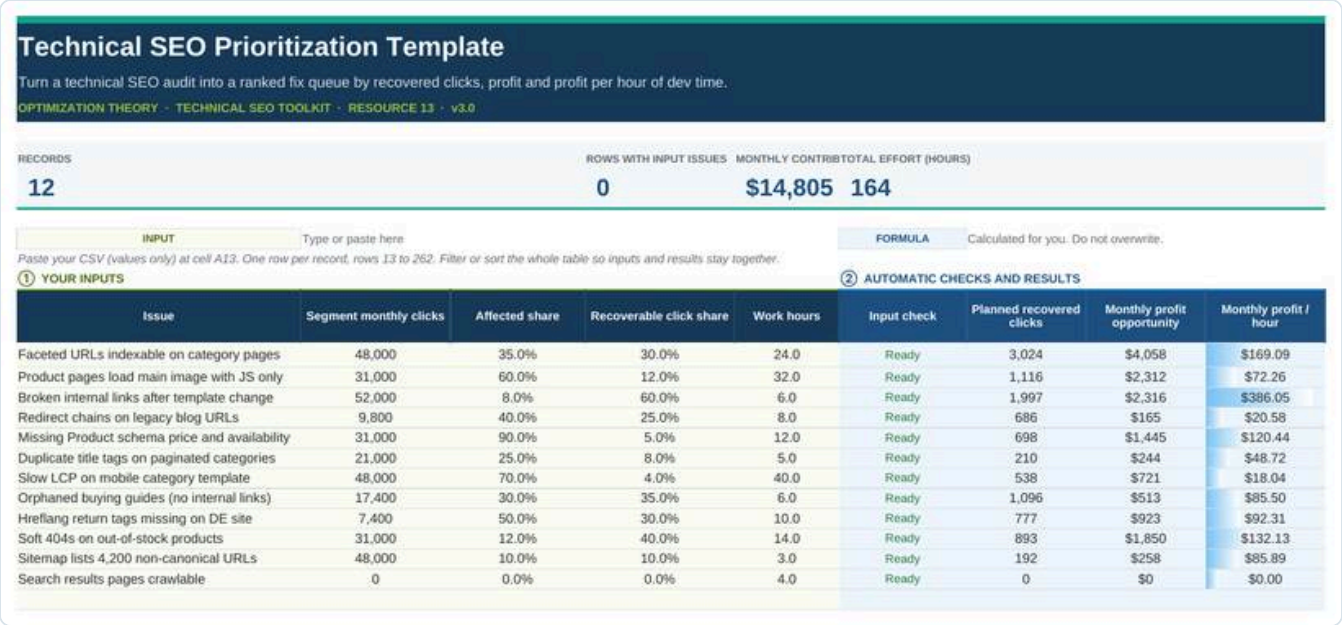
Be explicit about uncertainty

Recoverable share is how much you could win back; confidence is how sure you are. Both are editable and visible.

4

Rank and hand off

Sort by profit per hour. Give the top items to dev with the Owner column filled in.



Technical SEO Prioritization Template

Turn a technical SEO audit into a ranked fix queue by recovered clicks, profit and profit per hour of dev time.

OPTIMIZATION THEORY · TECHNICAL SEO TOOLKIT · RESOURCE 13 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	MONTHLY CONTRIB	TOTAL EFFORT (HOURS)
12	0	$14,805	164

INPUT — Type or paste here

FORMULA — Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS ② AUTOMATIC CHECKS AND RESULTS

Issue	Segment monthly clicks	Affected share	Recoverable click share	Work hours	Input check	Planned recovered clicks	Monthly profit opportunity	Monthly profit / hour
Faceted URLs indexable on category pages	48,000	35.0%	30.0%	24.0	Ready	3,024	$4,058	$169.09
Product pages load main image with JS only	31,000	60.0%	12.0%	32.0	Ready	1,116	$2,312	$72.26
Broken internal links after template change	52,000	8.0%	60.0%	6.0	Ready	1,997	$2,316	$386.05
Redirect chains on legacy blog URLs	9,800	40.0%	25.0%	8.0	Ready	686	$165	$20.58
Missing Product schema price and availability	31,000	90.0%	5.0%	12.0	Ready	698	$1,445	$120.44
Duplicate title tags on paginated categories	21,000	25.0%	8.0%	5.0	Ready	210	$244	$48.72
Slow LCP on mobile category template	48,000	70.0%	4.0%	40.0	Ready	538	$721	$18.04
Orphaned buying guides (no internal links)	17,400	30.0%	35.0%	6.0	Ready	1,096	$513	$85.50
Hreflang return tags missing on DE site	7,400	50.0%	30.0%	10.0	Ready	777	$923	$92.31
Soft 404s on out-of-stock products	31,000	12.0%	40.0%	14.0	Ready	893	$1,850	$132.13
Sitemap lists 4,200 non-canonical URLs	48,000	10.0%	10.0%	3.0	Ready	192	$258	$85.89
Search results pages crawlable	0	0.0%	0.0%	4.0	Ready	0	$0	$0.00

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

DataForSEO supplies the URL or query list and the audit trail; you add the measurements listed below.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 13 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Source reference (audit trail)	Issue, Segment monthly clicks, Affected share, Recoverable click share, Confidence factor, Conversion rate, Value per conversion, Work hours, Owner

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`issue`	Issue	Specific observed problem and affected template.	Your records or manual review
`monthly_clicks`	Segment monthly clicks	Observed monthly organic clicks for the affected segment.	Your records or manual review
`affected_share`	Affected share	Share of that segment exposed to the issue. Decimal, 0.08 = 8%.	Your records or manual review
`recoverable_share`	Recoverable click share	Hypothesized fraction of exposed clicks recoverable by the fix. Decimal, 0.08 = 8%.	Your records or manual review
`confidence`	Confidence factor	Analyst planning haircut from 0 to 1, not a statistical confidence interval. Decimal, 0.08 = 8%.	Your records or manual review
`conversion_rate`	Conversion rate	Conversions divided by eligible organic sessions for the same segment. This is an assumption. Decimal, 0.08 = 8%.	Your records or manual review
`value_per_conversion`	Value per conversion	USD contribution profit per conversion or expected lead profit. Use one value basis.	Your records or manual review
`effort_hours`	Work hours	Estimated implementation hours, greater than zero.	Your records or manual review
`owner`	Owner	Person accountable for the next action.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

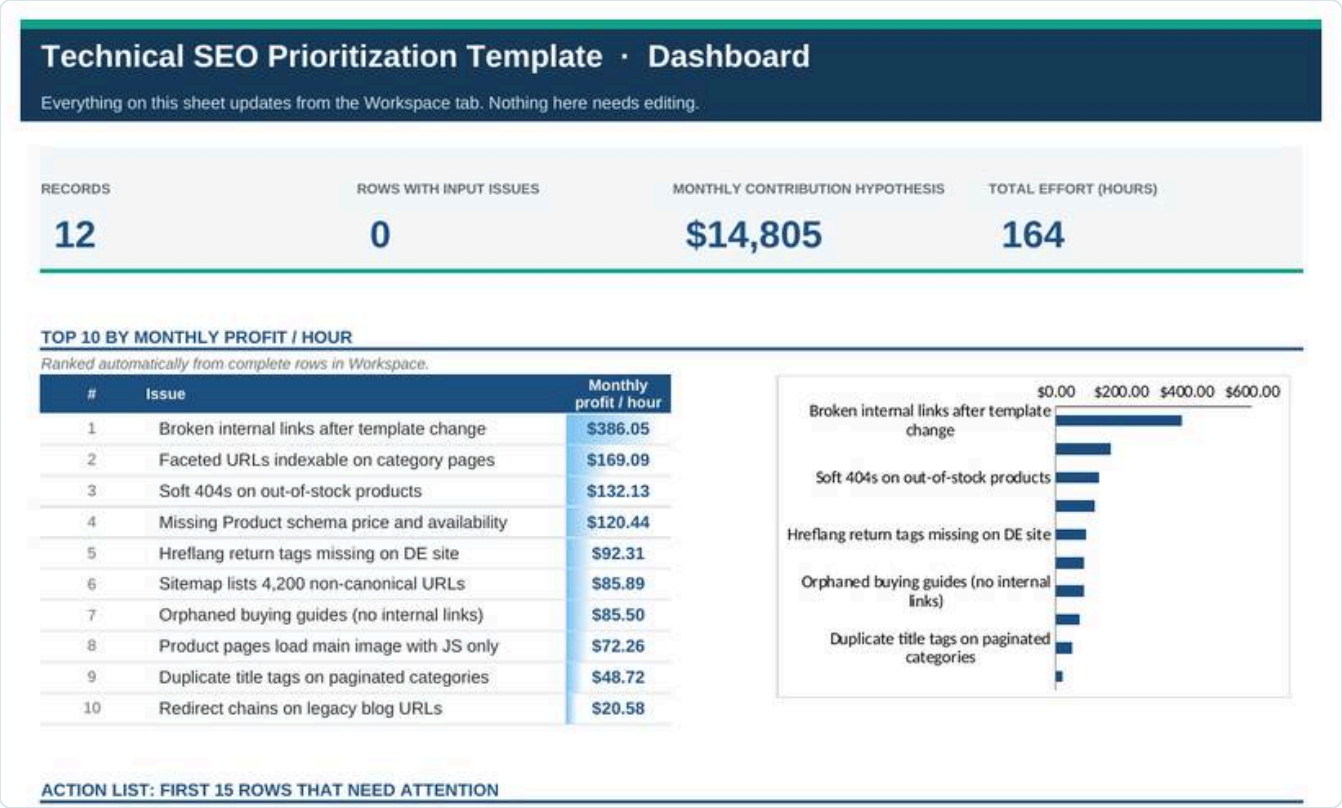
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 12 example rows.

12	0	$14,805	164
Records	Rows with input issues	Monthly contribution hypothesis	Total effort (hours)

The biggest issue by traffic, slow LCP on mobile category pages, lands near the bottom because it's a 40-hour job with a small recoverable share. Fixing broken internal links after a template change is the clear first sprint item at roughly $386 a month per hour.

Top 10 by monthly profit / hour

#	Issue	Monthly profit / hour
1	Broken internal links after template change	$386.05
2	Faceted URLs indexable on category pages	$169.09
3	Soft 404s on out-of-stock products	$132.13
4	Missing Product schema price and availability	$120.44
5	Hreflang return tags missing on DE site	$92.31



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

The calculation makes assumptions inspectable. It does not convert a crawl issue count directly into a ranking forecast.

Limits. Different issues can overlap the same clicks. Do not sum overlapping opportunities without deduplication.

Mistakes to avoid

Prioritizing by crawler severity. Severity labels don't know your traffic or margins. Use them to find issues, not to rank them.

Hiding assumptions in a score. If stakeholders can't see the recoverable share and confidence, they can't challenge or trust the ranking.

Counting the same traffic twice. When two issues affect the same pages, don't add their recoverable clicks together uncritically.

Tips from the field

Feed issues from the crawl waste, indexability and CWV templates into this one.

Revisit confidence after each fix ships; you'll calibrate quickly.

Export the top 10 as tickets with the profit estimate in the description.

Questions people ask

How do I prioritize technical SEO issues?

Estimate the traffic each issue affects, how much you could recover, the value of that traffic and the effort to fix. Rank by value per hour of effort.

What should a technical SEO audit template include?

The issue, affected pages and traffic, impact assumptions, owner, effort, evidence and a calculated priority. This template adds the profit math and a ranked dashboard.

Is this an impact vs effort matrix?

Yes, in numeric form. Instead of placing issues on a 2x2 grid, it calculates impact in profit and divides by effort.

What if an issue has no measurable traffic?

Enter zero clicks and it will rank at the bottom. Handle compliance, security or hygiene items separately; they don't need an SEO business case.

Templates that work well with this one

Crawl Budget Analysis Template

Group verified Googlebot requests by URL pattern, measure crawl waste and pick the right fix for each pattern.

Core Web Vitals Tracker

Log p75 LCP, INP and CLS by URL and device, test against Google's good thresholds and see what fails.

Internal Linking Opportunity Template

Score each source-to-target internal link by expected visits and contribution per hour, then verify it went live.

Indexability Audit Template

Check status, robots, noindex and canonical on every page you want indexed, then see exactly what to fix first.

XML Sitemap Audit Template

Reconcile sitemap URLs against status, canonical, robots and noindex to see what to add, remove or fix.

SEO Roadmap Template

Sequence 90 days of SEO and GEO work by weighted opportunity per hour, dependencies and acceptance criteria.

Read the full tutorial online: **optimizationtheory.com/download-view/technical-seo-prioritization-template/**
Get all six templates in the **Technical SEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

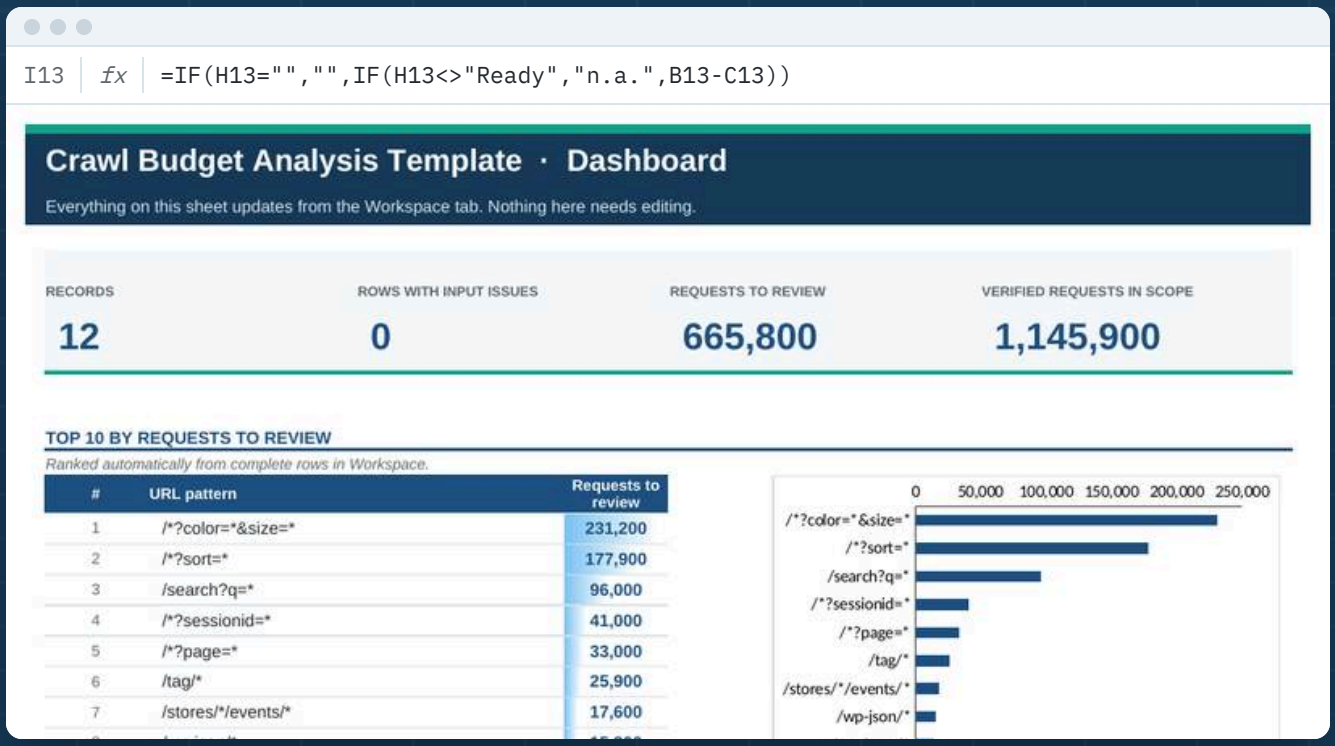
OptimizationTheory.com

Technical SEO Toolkit, resource 14

Crawl Budget Analysis Template

Group verified Googlebot requests by URL pattern, measure crawl waste and pick the right fix for each pattern.

Built for the DataForSEO API: On-Page API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which URL patterns soak up crawl requests without returning value, how much crawl activity each wastes, and what to do about it.

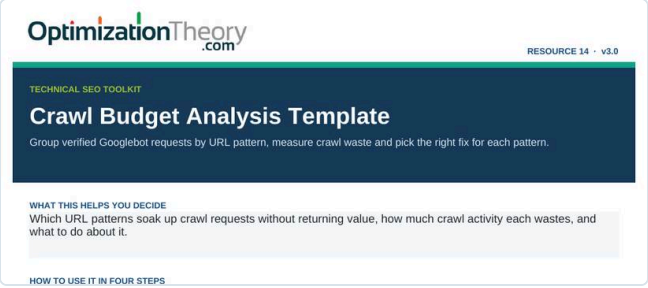
Crawl budget is a real constraint on large sites: ecommerce catalogs with faceted navigation, marketplaces, publishers with deep archives. When Googlebot spends hundreds of thousands of requests on sort orders, filter combinations and session IDs, new and updated pages wait longer to be crawled.

This crawl budget analysis template works from verified Googlebot log data grouped by URL pattern. For each pattern you enter total verified requests and how many hit valuable URLs, plus unique URLs and internal links. It calculates requests to review, the share of the pattern that's waste, and requests per URL, so you can match each pattern to the right fix.

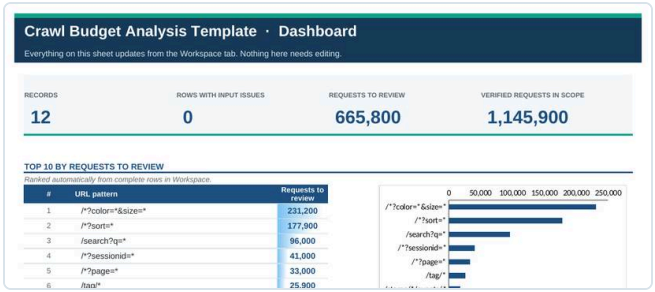
Who it's for

- Technical SEOs on large ecommerce or publisher sites
- Developers deciding how to handle faceted navigation and parameters
- Teams investigating slow indexing of new pages
- Anyone with server logs and a suspicion something's wrong

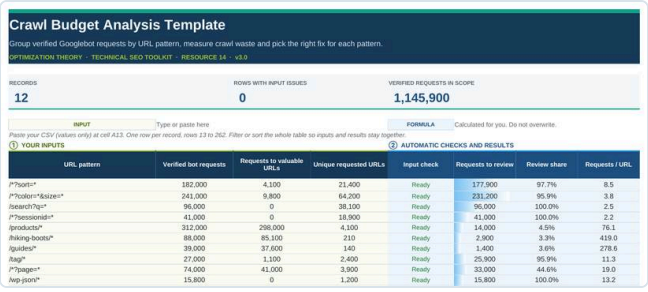
What's in the workbook



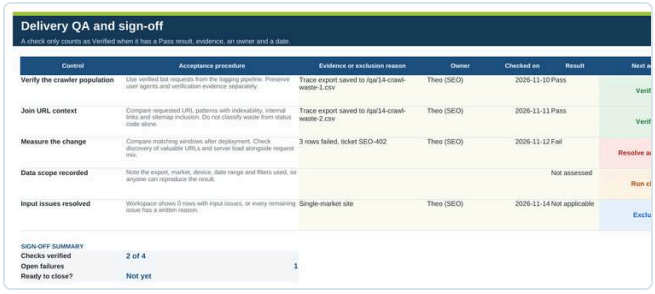
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Requests to review = verified requests – valuable requests. Review share = requests to review ÷ verified requests. Requests per URL = verified requests ÷ unique URLs.

The key formula, as written in the workbook

```
=IF(H13="","",IF(H13<>"Ready","n.a.",B13-C13))
```

Result column	Plain-English formula	What it tells you
Requests to review	Verified bot requests-Requests to valuable URLs	Requests outside the approved valuable subset. Not all are waste.
Review share	IF(Verified bot requests=0,"n.a.",Requests to review ÷ Verified bot requests)	Share of verified requests outside the valuable subset.
Requests / URL	Verified bot requests ÷ Unique requested URLs	Request frequency for this observed window.

How to use it, step by step

1

Verify the bot

Filter logs to verified Googlebot using reverse DNS. User agents alone are easily spoofed.

2

Group by pattern

Bucket URLs into patterns: parameters, folders, templates. Count requests and unique URLs per pattern for a fixed window.

3

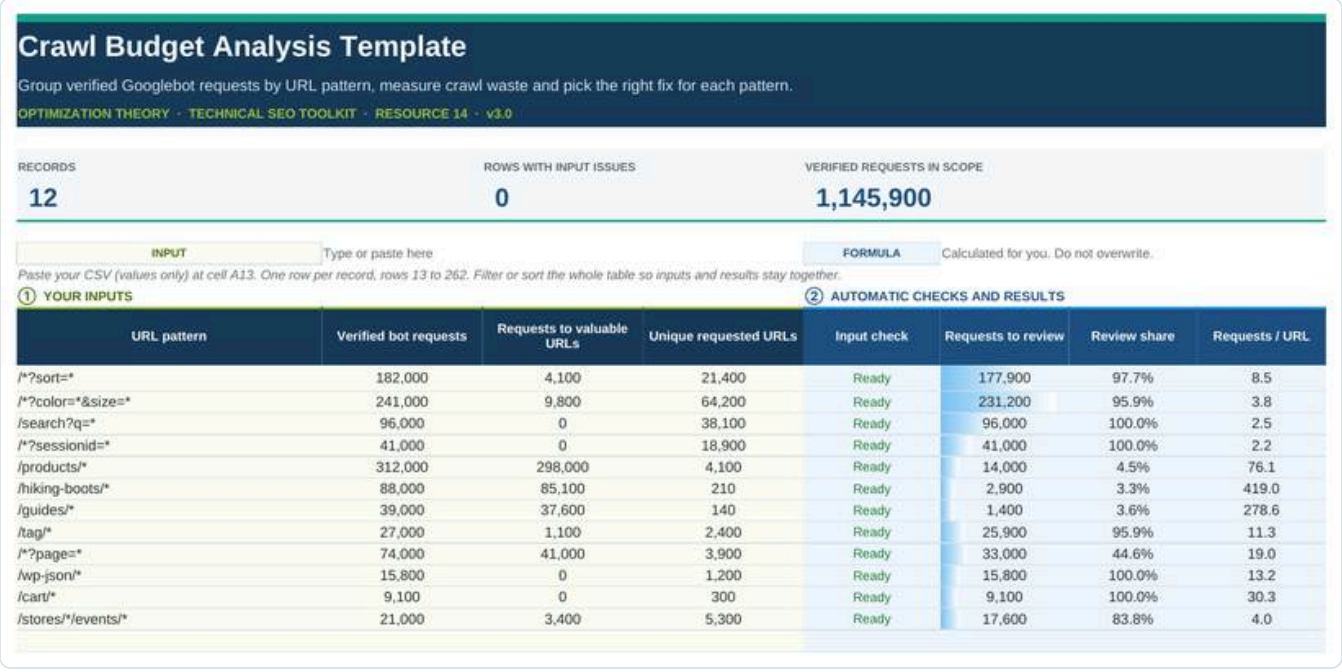
Mark valuable requests

Valuable means the request hit an indexable, canonical URL you want crawled. Join with your crawl data.

4

Choose an action per pattern

High review share with many internal links usually means fixing links; high requests per URL means a trap.



Crawl Budget Analysis Template

Group verified Googlebot requests by URL pattern, measure crawl waste and pick the right fix for each pattern.

OPTIMIZATION THEORY · TECHNICAL SEO TOOLKIT · RESOURCE 14 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	VERIFIED REQUESTS IN SCOPE
12	0	1,145,900

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

URL pattern	Verified bot requests	Requests to valuable URLs	Unique requested URLs	Input check	Requests to review	Review share	Requests / URL
/*?sort=*	182,000	4,100	21,400	Ready	177,900	97.7%	8.5
/*?color=*&size=*	241,000	9,800	64,200	Ready	231,200	95.9%	3.8
/search?q=*	96,000	0	38,100	Ready	96,000	100.0%	2.5
/*?sessionid=*	41,000	0	18,900	Ready	41,000	100.0%	2.2
/products/*	312,000	298,000	4,100	Ready	14,000	4.5%	76.1
/hiking-boots/*	88,000	85,100	210	Ready	2,900	3.3%	419.0
/guides/*	39,000	37,600	140	Ready	1,400	3.6%	278.6
/tag/*	27,000	1,100	2,400	Ready	25,900	95.9%	11.3
/*?page=*	74,000	41,000	3,900	Ready	33,000	44.6%	19.0
/wp-json/*	15,800	0	1,200	Ready	15,800	100.0%	13.2
/cart/*	9,100	0	300	Ready	9,100	100.0%	30.3
/stores/*/events/*	21,000	3,400	5,300	Ready	17,600	83.8%	4.0

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

DataForSEO supplies the URL or query list and the audit trail; you add the measurements listed below.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 14 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Source reference (audit trail)	URL pattern, Verified bot requests, Requests to valuable URLs, Unique requested URLs, Average internal inlinks, Next action

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`pattern`	URL pattern	Mutually exclusive URL pattern or template group.	Your records or manual review
`verified_requests`	Verified bot requests	Count from server logs after verifying the bot identity.	Your records or manual review
`valuable_requests`	Requests to valuable URLs	Requests inside the same group to approved canonical indexable URLs.	Your records or manual review
`unique_urls`	Unique requested URLs	Distinct URLs requested by the verified bot.	Your records or manual review
`inlinks`	Average internal inlinks	Crawl-derived average inlinks for this same group.	Your records or manual review
`action`	Next action	Document a proposed navigation, canonical, status or URL-generation change.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

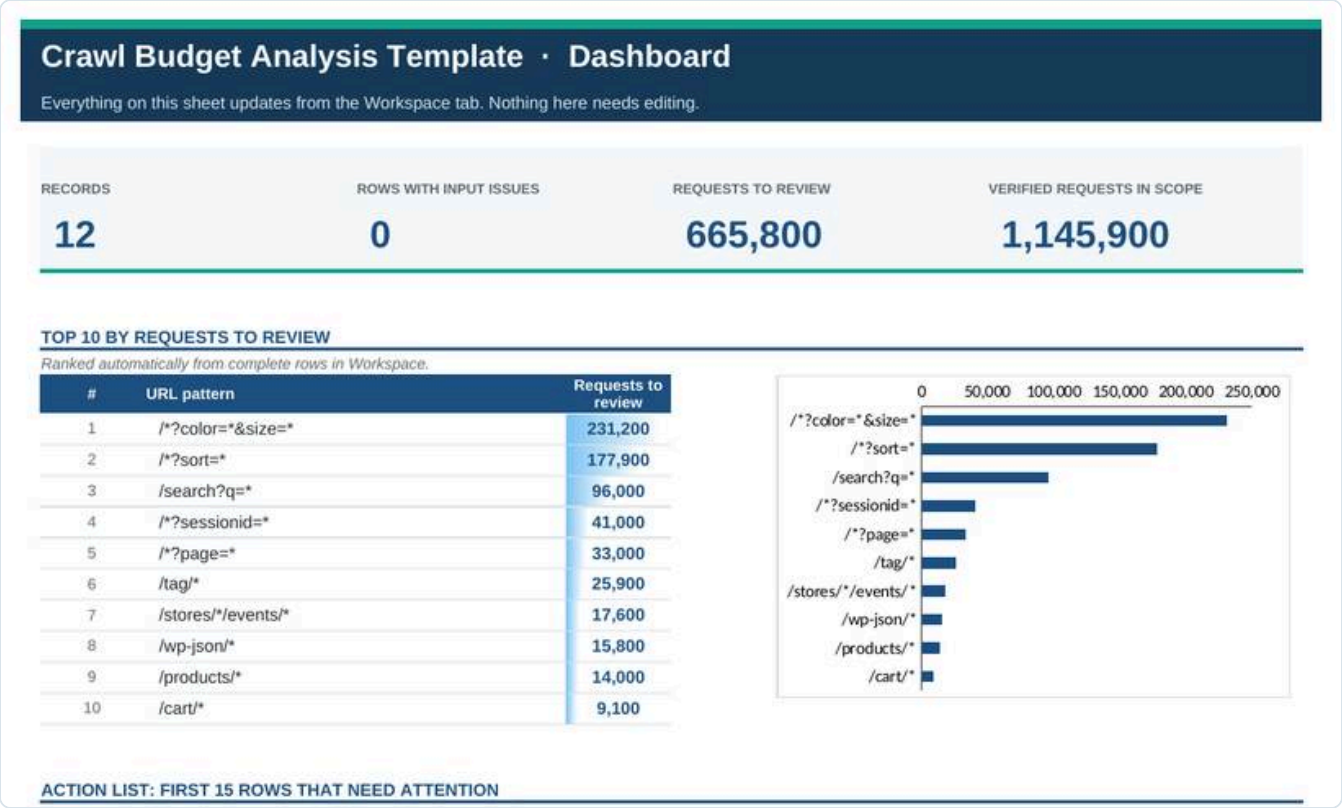
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 12 example rows.

12	0	665,800	1,145,900
Records	Rows with input issues	Requests to review	Verified requests in scope

Filter combinations and sort parameters account for most of the example's waste. Product URLs are 95% valuable and should be left alone.

Top 10 by requests to review

#	URL pattern	Requests to review
1	/*?color=*&size=*	231,200
2	/*?sort=*	177,900
3	/search?q=*	96,000
4	/*?sessionid=*	41,000
5	/*?page=*	33,000



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Redirect checks, robots fetching and discovery can be legitimate. The metric finds work to inspect.

Limits. On-Page is a site crawl, not Googlebot logs. Server request data must come from your verified logs.

Mistakes to avoid

Using unverified user agents. Fake Googlebots are common. Verify before analyzing.

Blocking parameters that carry canonical signals. If a parameter URL is canonicalized, blocking it in robots.txt stops Google from seeing the canonical. Choose the fix deliberately.

Treating crawl budget as a problem on small sites. Sites with a few thousand URLs rarely have crawl budget issues. Check indexation first.

Tips from the field

Cut internal links to wasteful patterns before blocking them; links create the demand.

Track the same patterns monthly to confirm fixes reduce waste.

Pair with the indexability audit to check what's valuable.

Questions people ask

What is crawl budget?

The number of URLs Googlebot can and wants to crawl on your site in a given time. It matters mostly for very large or frequently changing sites.

How do I analyze crawl budget with log files?

Filter server logs to verified Googlebot, group requests by URL pattern, and compare requests on valuable URLs with requests on parameters, duplicates and dead ends.

What causes crawl waste?

Faceted navigation, sort and filter parameters, session IDs, internal search pages, infinite calendars and expired content that keeps getting linked.

Should I block parameters in robots.txt?

Sometimes. It's effective for pure waste, but it hides canonicals and noindex from Google. For duplicates with signals, prefer removing links and using canonicals.

Templates that work well with this one

Technical SEO Prioritization Template
Turn a technical SEO audit into a ranked fix queue by recovered clicks, profit and profit per hour of dev time.

Indexability Audit Template
Check status, robots, noindex and canonical on every page you want indexed, then see exactly what to fix first.

XML Sitemap Audit Template
Reconcile sitemap URLs against status, canonical, robots and noindex to see what to add, remove or fix.

Internal Linking Opportunity Template
Score each source-to-target internal link by expected visits and contribution per hour, then verify it went live.

Programmatic SEO Checklist
QA every generated page for verified data, unique value, indexability, links and rendering before release.

Core Web Vitals Tracker
Log p75 LCP, INP and CLS by URL and device, test against Google's good thresholds and see what fails.

Read the full tutorial online: **optimizationtheory.com/download-view/crawl-budget-analysis-template/**
Get all six templates in the **Technical SEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

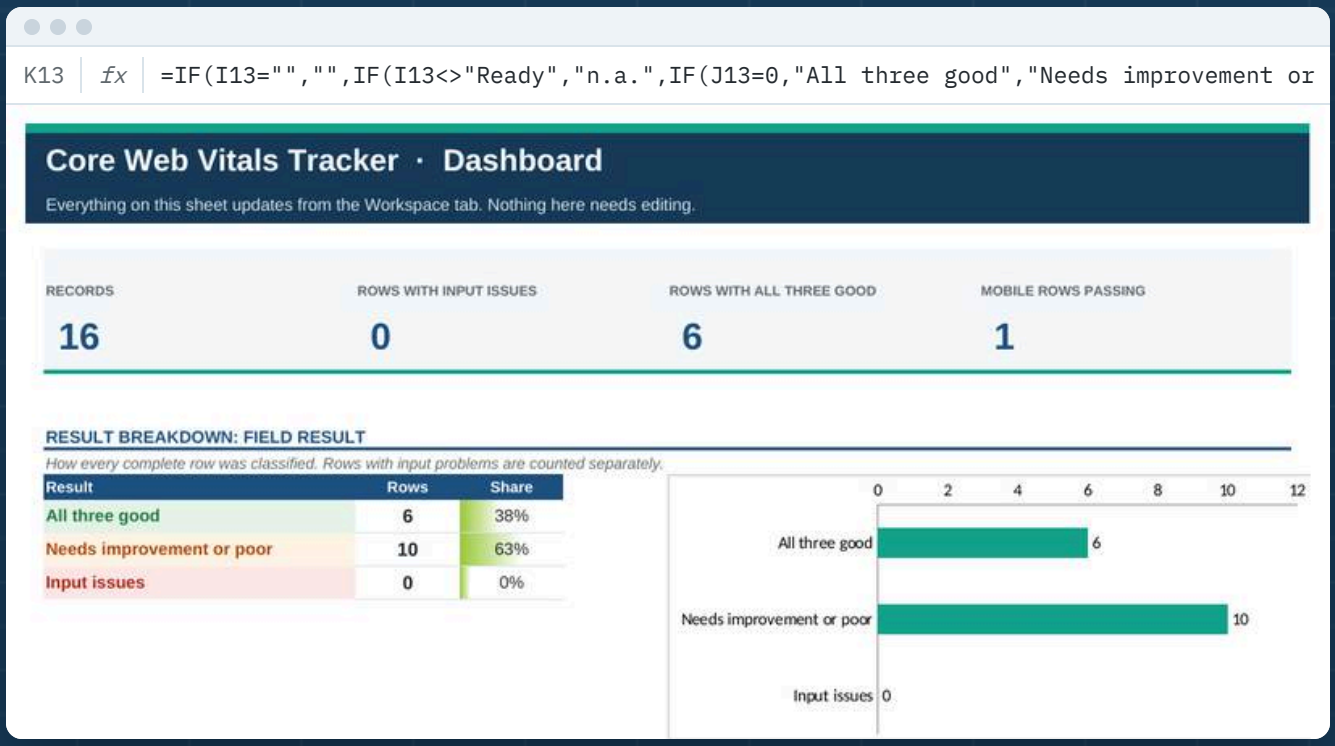
OptimizationTheory.com

Technical SEO Toolkit, resource 15

Core Web Vitals Tracker

Log p75 LCP, INP and CLS by URL and device, test against Google's good thresholds and see what fails.

Built for the DataForSEO API: On-Page API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which pages and devices pass all three Core Web Vitals at the 75th percentile, and which metrics are failing where.

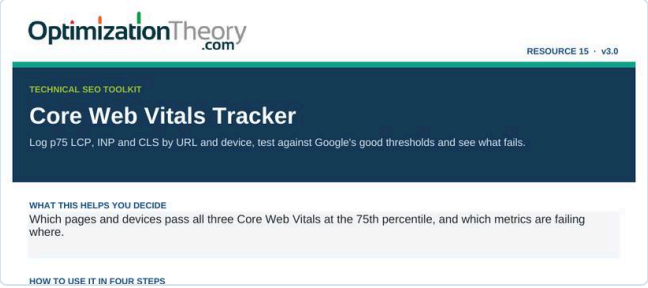
Core Web Vitals are measured on real users, at the 75th percentile, separately for mobile and desktop. That last part trips people up: a page can pass on desktop and fail on mobile, and lab tools like Lighthouse don't tell you what real users experienced.

This Core Web Vitals tracker records field data (from CrUX or your RUM tool) for each URL and device, counts how many metrics are above Google's good thresholds (LCP 2.5 s, INP 200 ms, CLS 0.1), and labels each row All three good or Needs improvement or poor.

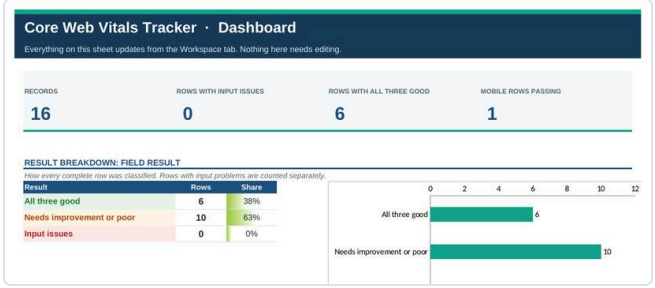
Who it's for

- Developers and SEOs tracking page experience over time
- Ecommerce teams prioritizing template performance work
- Agencies reporting performance to clients
- Teams validating a performance release

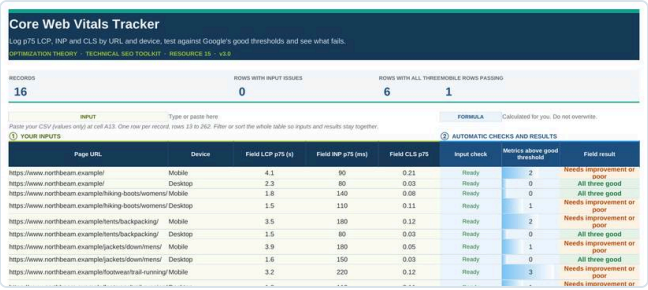
What's in the workbook



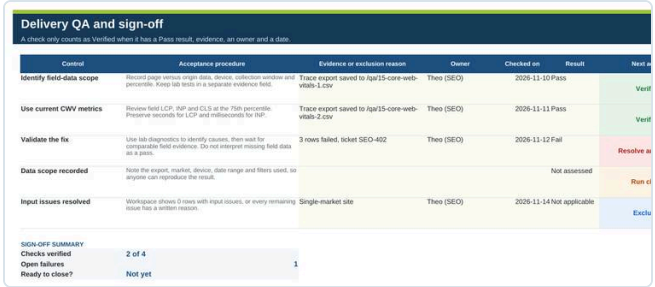
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Metrics above good threshold = 1 for LCP over 2.5 seconds + 1 for INP over 200 ms + 1 for CLS over 0.1. Zero means All three good.

The key formula, as written in the workbook

```
=IF(I13="","",IF(I13<>"Ready","n.a.",IF(J13=0,"All three good","Needs improvement or poor")))
```

Result column	Plain-English formula	What it tells you
Metrics above good threshold	IF(Field LCP p75 (s)>2.5,1,0)+IF(Field INP p75 (ms)>200,1,0)+IF(Field CLS p75>0.1,1,0)	Count above the current good thresholds.
Field result	IF(Metrics above good threshold=0,"All three good","Needs improvement or poor")	Pass requires all three field metrics at or below good thresholds.

The results you'll see

All three good Needs improvement or poor

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Pick representative URLs

Choose top templates: home, category, product, article, landing pages.

2

Pull field data

Use the CrUX API or PageSpeed Insights field data for p75 LCP, INP and CLS, by device, with the window length.

3

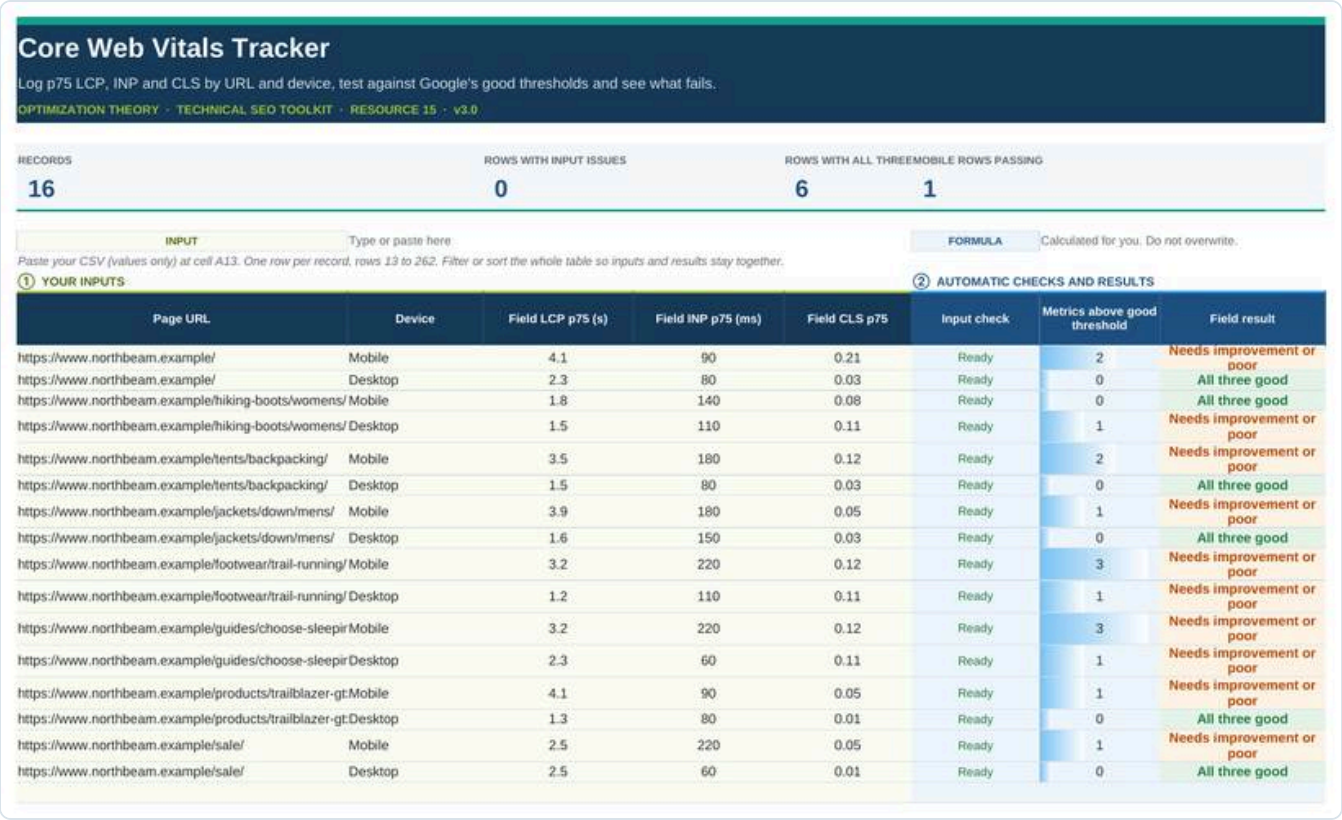
Record evidence

Note the source and date so later rows are comparable.

4

Fix mobile first

Most failures are mobile. Group fails by template and send them to the fix prioritizer.



Core Web Vitals Tracker

Log p75 LCP, INP and CLS by URL and device, test against Google's good thresholds and see what fails.

OPTIMIZATION THEORY · TECHNICAL SEO TOOLKIT · RESOURCE 15 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	ROWS WITH ALL THREE	MOBILE ROWS PASSING
16	0	6	1

INPUT — Type or paste here

FORMULA — Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS

② AUTOMATIC CHECKS AND RESULTS

Page URL	Device	Field LCP p75 (s)	Field INP p75 (ms)	Field CLS p75	Input check	Metrics above good threshold	Field result
https://www.northbeam.example/	Mobile	4.1	90	0.21	Ready	2	Needs improvement or poor
https://www.northbeam.example/	Desktop	2.3	80	0.03	Ready	0	All three good
https://www.northbeam.example/hiking-boots/womens/	Mobile	1.8	140	0.08	Ready	0	All three good
https://www.northbeam.example/hiking-boots/womens/	Desktop	1.5	110	0.11	Ready	1	Needs improvement or poor
https://www.northbeam.example/tents/backpacking/	Mobile	3.5	180	0.12	Ready	2	Needs improvement or poor
https://www.northbeam.example/tents/backpacking/	Desktop	1.5	80	0.03	Ready	0	All three good
https://www.northbeam.example/jackets/down/mens/	Mobile	3.9	180	0.05	Ready	1	Needs improvement or poor
https://www.northbeam.example/jackets/down/mens/	Desktop	1.6	150	0.03	Ready	0	All three good
https://www.northbeam.example/footwear/trail-running/	Mobile	3.2	220	0.12	Ready	3	Needs improvement or poor
https://www.northbeam.example/footwear/trail-running/	Desktop	1.2	110	0.11	Ready	1	Needs improvement or poor
https://www.northbeam.example/guides/choose-sleepir	Mobile	3.2	220	0.12	Ready	3	Needs improvement or poor
https://www.northbeam.example/guides/choose-sleepir	Desktop	2.3	60	0.11	Ready	1	Needs improvement or poor
https://www.northbeam.example/products/trailblazer-gt	Mobile	4.1	90	0.05	Ready	1	Needs improvement or poor
https://www.northbeam.example/products/trailblazer-gt	Desktop	1.3	80	0.01	Ready	0	All three good
https://www.northbeam.example/sale/	Mobile	2.5	220	0.05	Ready	1	Needs improvement or poor
https://www.northbeam.example/sale/	Desktop	2.5	60	0.01	Ready	0	All three good

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

DataForSEO supplies the URL or query list and the audit trail; you add the measurements listed below.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 15 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Page URL	Device, Field LCP p75 (s), Field INP p75 (ms), Field CLS p75, Field window days, Evidence

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`url`	Page URL	Exact absolute URL. Keep case and query parameters unless a documented normalization rule applies.	DataForSEO: url
`device`	Device	mobile or desktop.	Your records or manual review
`lcp_seconds`	Field LCP p75 (s)	CrUX or RUM 75th percentile LCP in seconds. Never paste lab LCP here.	Your records or manual review
`inp_ms`	Field INP p75 (ms)	CrUX or RUM 75th percentile INP in milliseconds.	Your records or manual review
`cls`	Field CLS p75	CrUX or RUM 75th percentile CLS, unitless.	Your records or manual review
`window_days`	Field window days	Complete field aggregation period, usually 28 days.	Your records or manual review
`evidence`	Evidence	Link to a dated crawl, screenshot, ticket or source that another reviewer can inspect.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

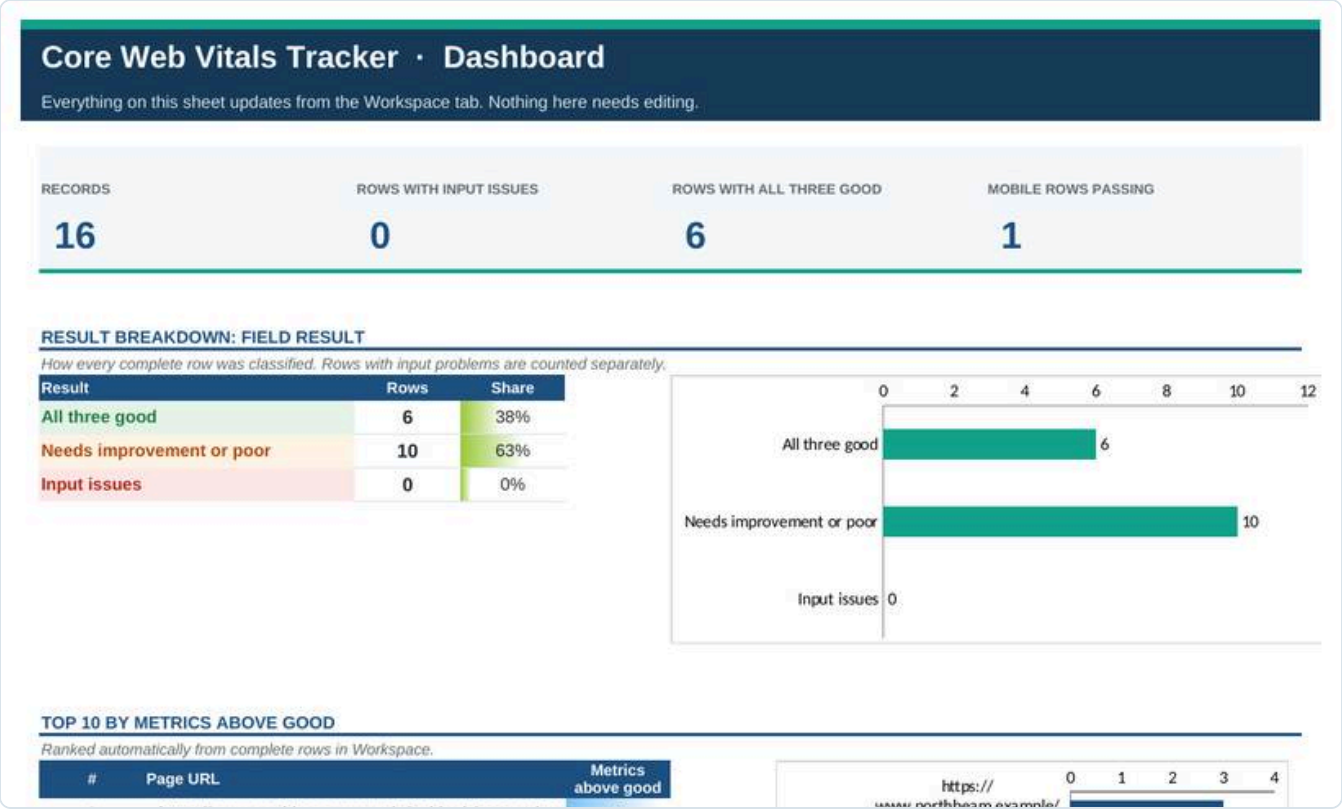
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 16 example rows.

16	0	6	1
Records	Rows with input issues	Rows with all three good	Mobile rows passing

Only one mobile row in the example passes all three metrics. Desktop mostly passes, which is the usual pattern and why mobile field data should drive the work.

Top 10 by metrics above good

#	Page URL	Metrics above good
1	https://www.northbeam.example/guides/choose-sleeping-bag/	3
2	https://www.northbeam.example/footwear/trail-running/	3
3	https://www.northbeam.example/tents/backpacking/	2
4	https://www.northbeam.example/	2
5	https://www.northbeam.example/sale/	1



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

On-Page lab measurements can help debug a page, but cannot fill the field INP or field p75 columns.

Limits. Origin-level field data must be labeled as origin data in evidence. Missing CrUX coverage is not a pass.

Mistakes to avoid

Using Lighthouse scores as Core Web Vitals. Lighthouse is lab data. Core Web Vitals are field data from real users.

Still tracking FID. INP replaced FID as a Core Web Vital in March 2024.

Averaging metrics. Thresholds apply at the 75th percentile. Averages hide the slow experiences that matter.

Tips from the field

Low-traffic URLs may have no URL-level CrUX data; use origin-level data and note it.

Track the same URLs monthly to see trends after releases.

Send failing templates to the technical SEO prioritizer with their traffic.

Questions people ask

What are good Core Web Vitals scores?

At the 75th percentile: LCP of 2.5 seconds or less, INP of 200 milliseconds or less, and CLS of 0.1 or less.

What replaced FID?

Interaction to Next Paint (INP) replaced First Input Delay in March 2024.

Where do I get Core Web Vitals field data?

From the Chrome UX Report (CrUX) via PageSpeed Insights, the CrUX API, BigQuery, or your own real-user monitoring.

Are Core Web Vitals a ranking factor?

They're part of Google's page experience signals. They matter, but they rarely outweigh relevance and content quality.

Templates that work well with this one

Technical SEO Prioritization Template

Turn a technical SEO audit into a ranked fix queue by recovered clicks, profit and profit per hour of dev time.

Crawl Budget Analysis Template

Group verified Googlebot requests by URL pattern, measure crawl waste and pick the right fix for each pattern.

Ecommerce SEO Prioritization Template

Rank product pages by potential orders, unit contribution and profit per hour, and catch out-of-stock or noindex SKUs.

Indexability Audit Template

Check status, robots, noindex and canonical on every page you want indexed, then see exactly what to fix first.

Internal Linking Opportunity Template

Score each source-to-target internal link by expected visits and contribution per hour, then verify it went live.

Schema Markup Audit Template

Check presence, syntax, required fields, visible-content match and policy for every structured data type you ship.

Read the full tutorial online: **optimizationtheory.com/download-view/core-web-vitals-tracker/**
Get all six templates in the **Technical SEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

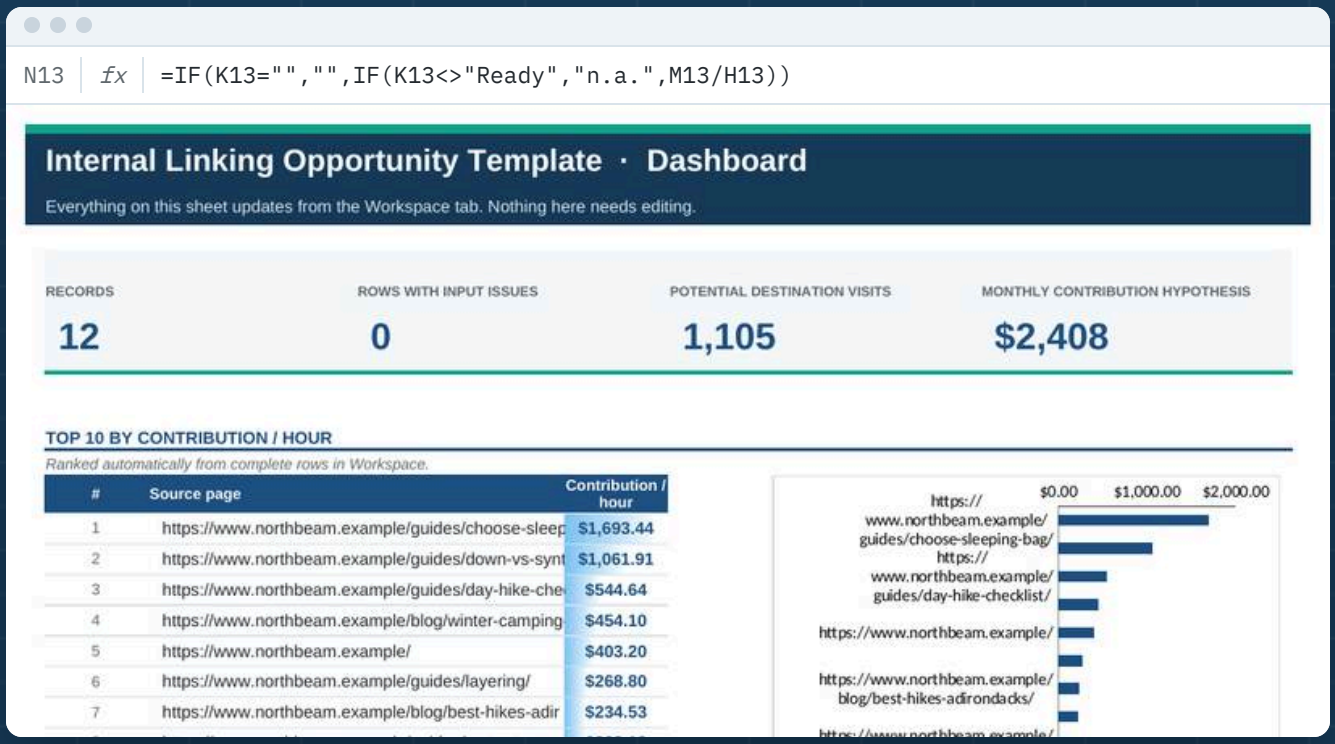
OptimizationTheory.com

Technical SEO Toolkit, resource 16

Internal Linking Opportunity Template

Score each source-to-target internal link by expected visits and contribution per hour, then verify it went live.

Built for the DataForSEO API: On-Page API



Jourdan Rombough, optimizationtheory.com

What this template decides

Which internal links to add first, based on the source page's traffic, the expected link click-through and the value of the destination.

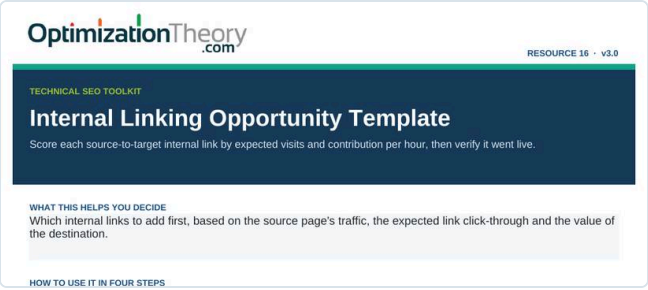
Internal links are the cheapest lever in SEO: they cost minutes, need no developer, and move both users and authority to the pages that matter. Most sites still add them haphazardly, a link here when someone remembers, with no idea which links would actually send visits.

This internal linking template scores each proposed link. Enter the source page's clicks, an expected link CTR, the destination's conversion rate and value, and the effort. It calculates potential destination visits, a monthly contribution hypothesis and contribution per hour. Links that already exist are zeroed out so you don't double count.

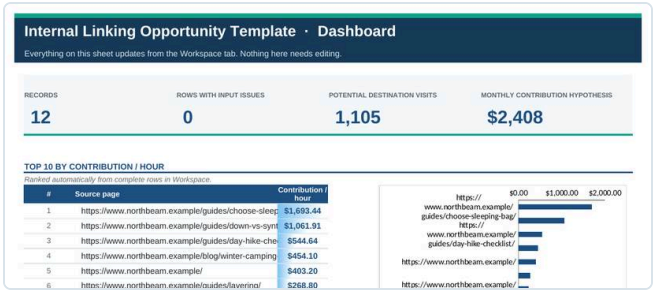
Who it's for

- Content and SEO teams improving internal linking
- Ecommerce teams connecting guides to category and product pages
- Sites recovering from orphaned or deep pages
- Anyone planning a hub-and-spoke content structure

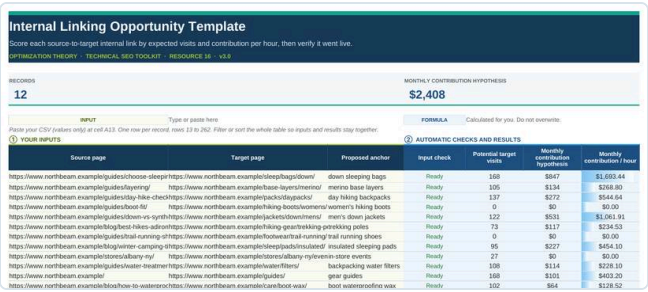
What's in the workbook



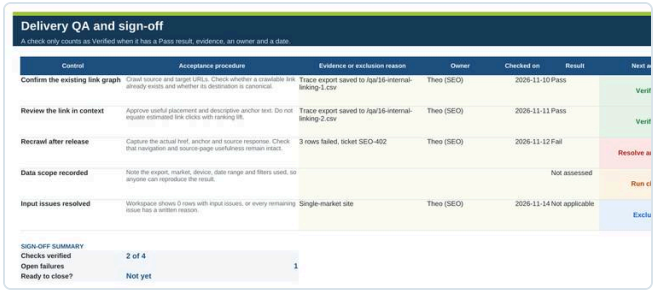
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Potential target visits = source clicks × link CTR (zero if already linked). Contribution = visits × conversion rate × value. Contribution per hour = contribution ÷ effort.

The key formula, as written in the workbook

```
=IF(K13="","",IF(K13<>"Ready","n.a.",M13/H13))
```

Result column	Plain-English formula	What it tells you
Potential target visits	IF(Link already exists=1,0,Source clicks ÷ month × Assumed link CTR)	Potential referred target visits from a new link, not new organic sessions.
Monthly contribution hypothesis	Potential target visits × Conversion rate × Value per conversion	Modeled conversion contribution from those visits.
Monthly contribution / hour	Monthly contribution hypothesis ÷ Work hours	Planning comparison for implementation effort.

How to use it, step by step

1

Find candidate sources

Pages with traffic that discuss a topic you have a target page for. Search Console and a site: search help.

2

Write the anchor

Use a natural, descriptive anchor that matches the target's topic.

3

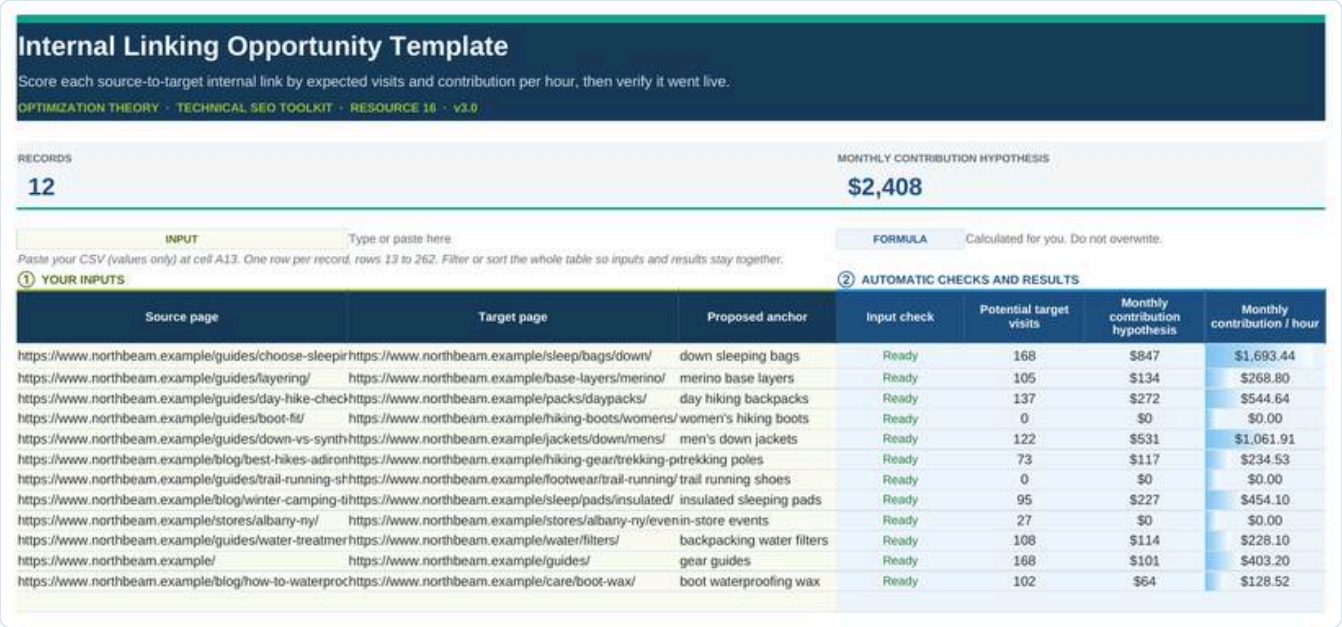
Estimate link CTR and value

Contextual links in body copy often get 1% to 8% CTR. Use the destination's own conversion rate and value.

4

Add, then verify

Add the top links, recrawl, and mark Already linked = 1 so the sheet stays accurate.



Internal Linking Opportunity Template

Score each source-to-target internal link by expected visits and contribution per hour, then verify it went live.

OPTIMIZATION THEORY · TECHNICAL SEO TOOLKIT · RESOURCE 16 · v3.0

RECORDS: 12

MONTHLY CONTRIBUTION HYPOTHESIS: $2,408

INPUT — Type or paste here

FORMULA — Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS ② AUTOMATIC CHECKS AND RESULTS

Source page	Target page	Proposed anchor	Input check	Potential target visits	Monthly contribution hypothesis	Monthly contribution / hour
https://www.northbeam.example/guides/choose-sleepir	https://www.northbeam.example/sleep/bags/down/	down sleeping bags	Ready	168	$847	$1,693.44
https://www.northbeam.example/guides/layering/	https://www.northbeam.example/base-layers/merino/	merino base layers	Ready	105	$134	$268.80
https://www.northbeam.example/guides/day-hike-chec	https://www.northbeam.example/packs/daypacks/	day hiking backpacks	Ready	137	$272	$544.64
https://www.northbeam.example/guides/boot-fit/	https://www.northbeam.example/hiking-boots/womens/	women's hiking boots	Ready	0	$0	$0.00
https://www.northbeam.example/guides/down-vs-synth	https://www.northbeam.example/jackets/down/mens/	men's down jackets	Ready	122	$531	$1,061.91
https://www.northbeam.example/blog/best-hikes-adiron	https://www.northbeam.example/hiking-gear/trekking-p	trekking poles	Ready	73	$117	$234.53
https://www.northbeam.example/guides/trail-running-sh	https://www.northbeam.example/footwear/trail-running/	trail running shoes	Ready	0	$0	$0.00
https://www.northbeam.example/blog/winter-camping-ti	https://www.northbeam.example/sleep/pads/insulated/	insulated sleeping pads	Ready	95	$227	$454.10
https://www.northbeam.example/stores/albany-ny/	https://www.northbeam.example/stores/albany-ny/even	in-store events	Ready	27	$0	$0.00
https://www.northbeam.example/guides/water-treatmer	https://www.northbeam.example/water/filters/	backpacking water filters	Ready	108	$114	$228.10
https://www.northbeam.example/	https://www.northbeam.example/guides/	gear guides	Ready	168	$101	$403.20
https://www.northbeam.example/blog/how-to-waterproc	https://www.northbeam.example/care/boot-wax/	boot waterproofing wax	Ready	102	$64	$128.52

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 16 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Source page	Target page, Proposed anchor, Source clicks / month, Assumed link CTR, Conversion rate, Value per conversion, Work hours, Link already exists

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
source_url	Source page	Existing relevant source URL.	DataForSEO: url
target_url	Target page	Destination canonical URL.	Your records or manual review
anchor	Proposed anchor	Descriptive anchor that suits the surrounding sentence.	Your records or manual review
source_clicks	Source clicks / month	GSC clicks to the source page.	Your records or manual review
link_ctr	Assumed link CTR	Assumed share of source visitors clicking the proposed link. Decimal, 0.08 = 8%.	Your records or manual review
conversion_rate	Conversion rate	Conversions divided by eligible organic sessions for the same segment. This is an assumption. Decimal, 0.08 = 8%.	Your records or manual review
value_per_conversion	Value per conversion	USD contribution profit per conversion or expected lead profit. Use one value basis.	Your records or manual review
effort_hours	Work hours	Estimated implementation hours, greater than zero.	Your records or manual review
already_linked	Link already exists	1 only when the exact relationship is verified in the crawl. 1 = Yes, 0 = No.	Your records or manual review
source_ref	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

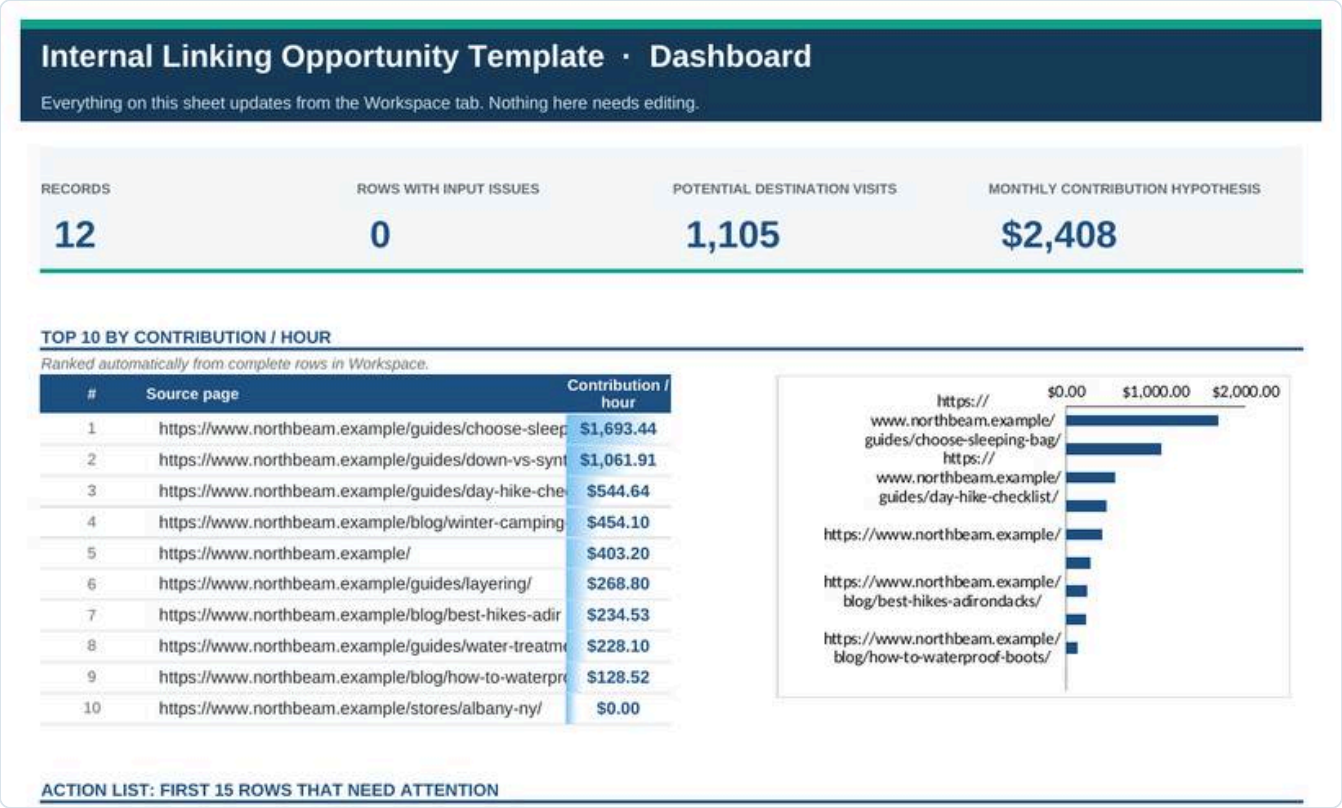
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 12 example rows.

12	0	1,105	$2,408
Records	Rows with input issues	Potential destination visits	Monthly contribution hypothesis

The best example link points from the sleeping bag buying guide to the down sleeping bag category. The homepage has far more clicks, but its link to the guides hub ranks lower because the intent is broader and the click-through smaller.

Top 10 by contribution / hour

#	Source page	Contribution / hour
1	https://www.northbeam.example/guides/choose-sleeping-bag/	$1,693.44
2	https://www.northbeam.example/guides/down-vs-synthetic/	$1,061.91
3	https://www.northbeam.example/guides/day-hike-checklist/	$544.63
4	https://www.northbeam.example/blog/winter-camping-tips/	$454.10
5	https://www.northbeam.example/	$403.20



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

This estimates navigation value. Ranking changes from internal linking are not quantified by this formula.

Limits. Link-level CTR needs analytics or an explicit assumption. On-Page inlink counts do not identify exact source-target edges.

Mistakes to avoid

Linking from irrelevant pages. A link from a busy but unrelated page gets few clicks and sends weak topical signals.

Exact-match anchors everywhere. Vary anchors naturally. Repetitive exact-match anchors look manipulative and read badly.

Forgetting to verify. CMS changes and template edits remove links. Recrawl and confirm.

Tips from the field

Use the PageRank simulator to see how links shift authority across a site.

Start with orphaned and deep pages that have value.

Link from guides to commercial pages and back; both directions help users.

Questions people ask

How do I find internal linking opportunities?

Look for pages with traffic that mention a topic you have a dedicated page for, but don't link to it. Search Console, site: searches and crawler content searches find them.

How many internal links should a page have?

There's no fixed number. Link where it helps the reader; prioritize links that are likely to be clicked.

Do internal links help rankings?

Yes. They help Google discover pages, understand topics and distribute authority, and they send real visitors.

What anchor text should I use?

Descriptive text that tells the reader what they'll get. Natural variation is better than repeating the exact keyword.

Templates that work well with this one

Technical SEO Prioritization Template

Turn a technical SEO audit into a ranked fix queue by recovered clicks, profit and profit per hour of dev time.

Keyword Mapping Template

Assign every keyword to exactly one URL and catch conflicting assignments before they become cannibalization.

Content Audit Template

Score every URL by lost clicks, conversions and links, choose keep, refresh, merge or retire, and catch the risky calls.

Keyword Cannibalization Checker Template

Find queries splitting clicks across two URLs, check whether intent really overlaps and decide whether to consolidate.

Link Reclamation Template

Find lost and broken backlinks worth fixing and rank them by expected referrals per hour of outreach.

Indexability Audit Template

Check status, robots, noindex and canonical on every page you want indexed, then see exactly what to fix first.

Read the full tutorial online: **optimizationtheory.com/download-view/internal-linking-template/**
Get all six templates in the **Technical SEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

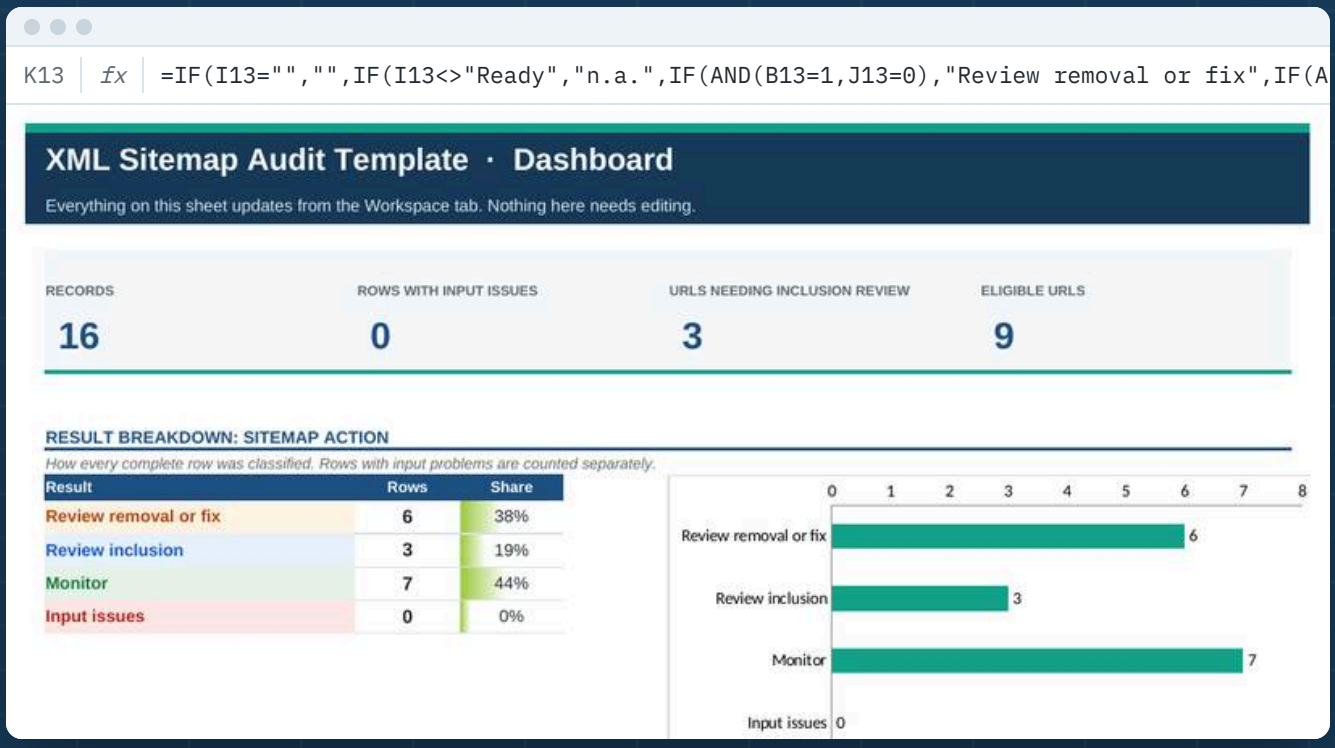
OptimizationTheory.com

Technical SEO Toolkit, resource 17

XML Sitemap Audit Template

Reconcile sitemap URLs against status, canonical, robots and noindex to see what to add, remove or fix.

Built for the DataForSEO API: On-Page API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which URLs should be removed from your XML sitemap (or fixed), which eligible URLs are missing from it, and which are fine.

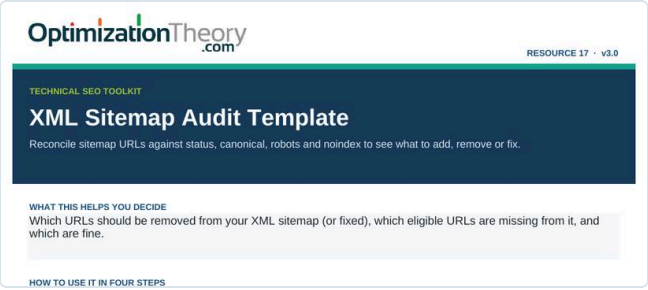
An XML sitemap is a list of URLs you're asking Google to treat as canonical and indexable. When it includes redirects, 404s, noindexed pages and parameter duplicates, you're sending mixed signals and making Search Console's sitemap reports useless.

This XML sitemap audit template reconciles each URL's sitemap membership with what a crawl observed. A URL is eligible when it returns 200, is self-canonical, crawlable, not noindexed and intended for indexing. The template flags sitemap URLs that aren't eligible (Review removal or fix) and eligible URLs missing from the sitemap (Review inclusion).

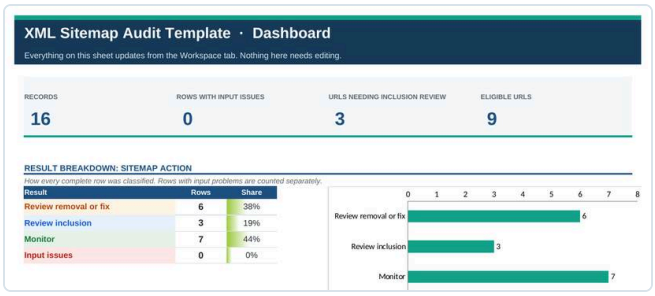
Who it's for

- Technical SEOs cleaning up sitemaps
- Developers generating sitemaps from a CMS
- Migration teams validating the new sitemap
- Sites with indexing gaps in Search Console

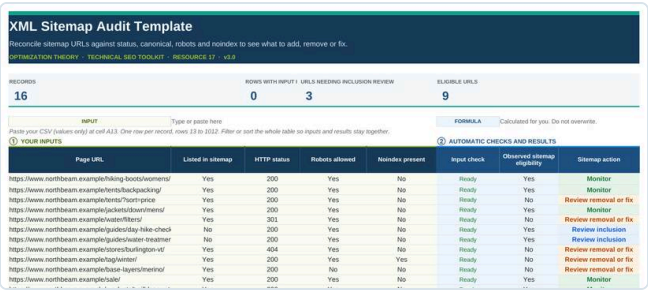
What's in the workbook



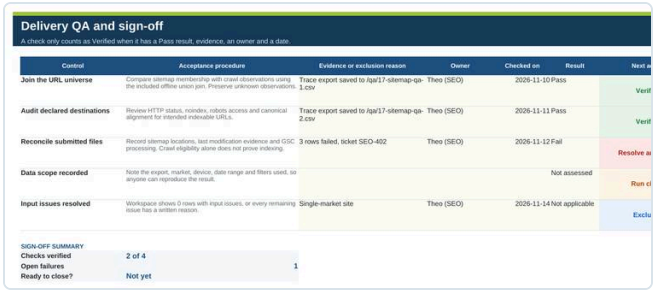
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 1,000 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Eligible = 1 when status is 200, canonical equals URL, robots allows, noindex is 0 and intended indexable is 1. In sitemap but not eligible = Review removal or fix. Eligible but not in sitemap = Review inclusion. Otherwise Monitor.

The key formula, as written in the workbook

```
=IF(I13="","",IF(I13<>"Ready","n.a.",IF(AND(B13=1,J13=0),"Review removal or fix",IF(AND(B13=0,J13=1),"Review inclusion","Monitor"))))
```

Result column	Plain-English formula	What it tells you
Observed sitemap eligibility	IF(AND(HTTP status=200,Canonical URL=Page URL,Robots allowed=1,Noindex present=0,Intended indexable=1),1,0)	Observed condition for inclusion in this sitemap plan.
Sitemap action	IF(AND(Listed in sitemap=1,Observed sitemap eligibility=0),"Review removal or fix",IF(AND(Listed in sitemap=0,Observed sitemap eligibility=1),"Review inclusion","Monitor"))	Suggests reconciliation based on intention and crawl evidence.

The results you'll see

Review removal or fix | Review inclusion | Monitor

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Parse your sitemaps

Extract every URL from the sitemap index and child sitemaps. Mark in_sitemap = 1.

2

Add crawled URLs not in the sitemap

From a full crawl, add indexable URLs that aren't listed. Mark in_sitemap = 0.

3

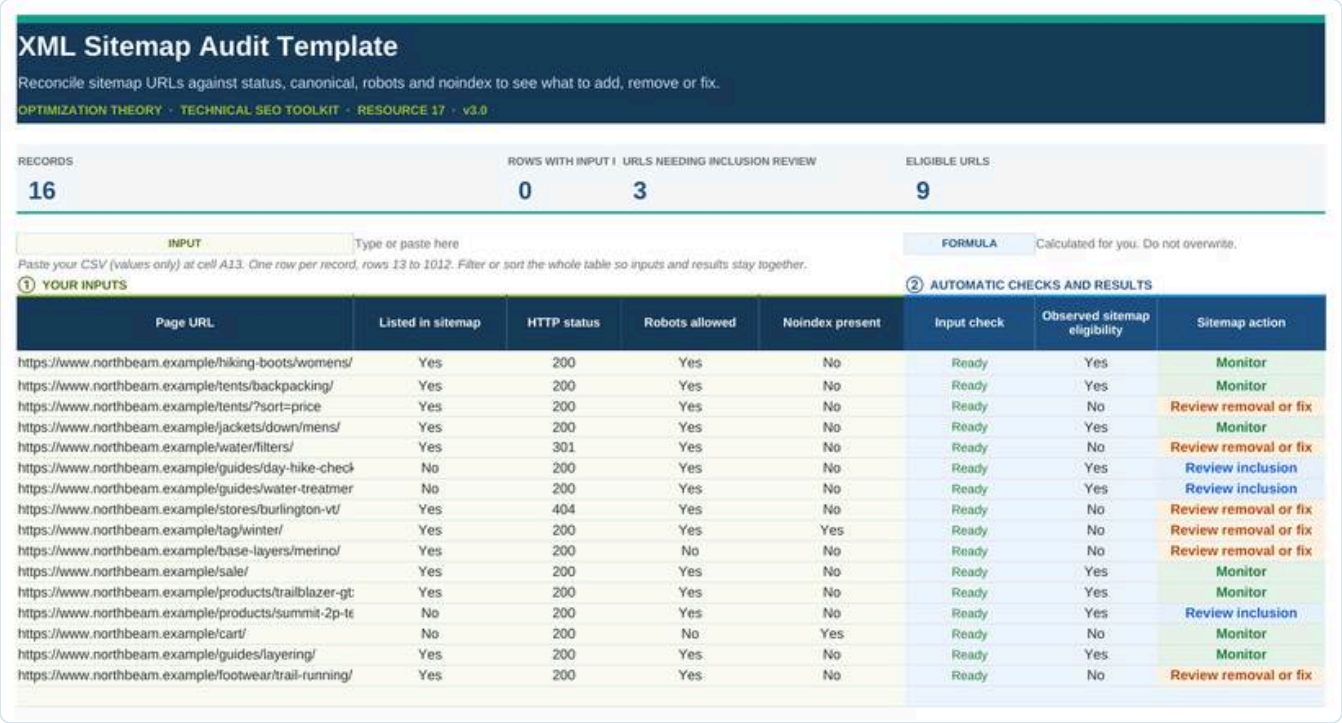
Record observed signals

Status code, canonical, robots allowed, noindex and whether you intend the page to be indexed.

4

Fix at the generator

Most sitemap errors come from the generator logic. Fix the rule, not the file.



XML Sitemap Audit Template

Reconcile sitemap URLs against status, canonical, robots and noindex to see what to add, remove or fix.

OPTIMIZATION THEORY · TECHNICAL SEO TOOLKIT · RESOURCE 17 · v3.0

RECORDS	ROWS WITH INPUT I	URLS NEEDING INCLUSION REVIEW	ELIGIBLE URLS
16	0	3	9

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 1012. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Page URL	Listed in sitemap	HTTP status	Robots allowed	Noindex present	Input check	Observed sitemap eligibility	Sitemap action
https://www.northbeam.example/hiking-boots/womens/	Yes	200	Yes	No	Ready	Yes	Monitor
https://www.northbeam.example/tents/backpacking/	Yes	200	Yes	No	Ready	Yes	Monitor
https://www.northbeam.example/tents/?sort=price	Yes	200	Yes	No	Ready	No	Review removal or fix
https://www.northbeam.example/jackets/down/mens/	Yes	200	Yes	No	Ready	Yes	Monitor
https://www.northbeam.example/water/filters/	Yes	301	Yes	No	Ready	No	Review removal or fix
https://www.northbeam.example/guides/day-hike-check	No	200	Yes	No	Ready	Yes	Review inclusion
https://www.northbeam.example/guides/water-treatmer	No	200	Yes	No	Ready	Yes	Review inclusion
https://www.northbeam.example/stores/burlington-vt/	Yes	404	Yes	No	Ready	No	Review removal or fix
https://www.northbeam.example/tag/winter/	Yes	200	Yes	Yes	Ready	No	Review removal or fix
https://www.northbeam.example/base-layers/merino/	Yes	200	No	No	Ready	No	Review removal or fix
https://www.northbeam.example/sale/	Yes	200	Yes	No	Ready	Yes	Monitor
https://www.northbeam.example/products/trailblazer-gt	Yes	200	Yes	No	Ready	Yes	Monitor
https://www.northbeam.example/products/summit-2p-te	No	200	Yes	No	Ready	Yes	Review inclusion
https://www.northbeam.example/cart/	No	200	No	Yes	Ready	No	Monitor
https://www.northbeam.example/guides/layering/	Yes	200	Yes	No	Ready	Yes	Monitor
https://www.northbeam.example/footwear/trail-running/	Yes	200	Yes	No	Ready	No	Review removal or fix

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 17 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Page URL, Listed in sitemap, HTTP status, Canonical URL	Robots allowed, Noindex present, Intended indexable

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`url`	Page URL	Exact absolute URL. Keep case and query parameters unless a documented normalization rule applies.	DataForSEO: url
`in_sitemap`	Listed in sitemap	1 when the exact URL is present in the sitemap under review. 1 = Yes, 0 = No.	DataForSEO: from_sitemap
`status_code`	HTTP status	Observed response for the sitemap URL.	DataForSEO: status_code
`canonical_url`	Canonical URL	Resolved declared canonical. Enter MISSING when absent.	DataForSEO: canonical_url
`robots_allowed`	Robots allowed	1 when the intended bot is allowed to fetch the page. 1 = Yes, 0 = No.	Your records or manual review
`noindex`	Noindex present	1 if a blocking noindex is present. 1 = Yes, 0 = No.	Your records or manual review
`intended_indexable`	Intended indexable	1 for URLs intentionally eligible for indexing. 1 = Yes, 0 = No.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

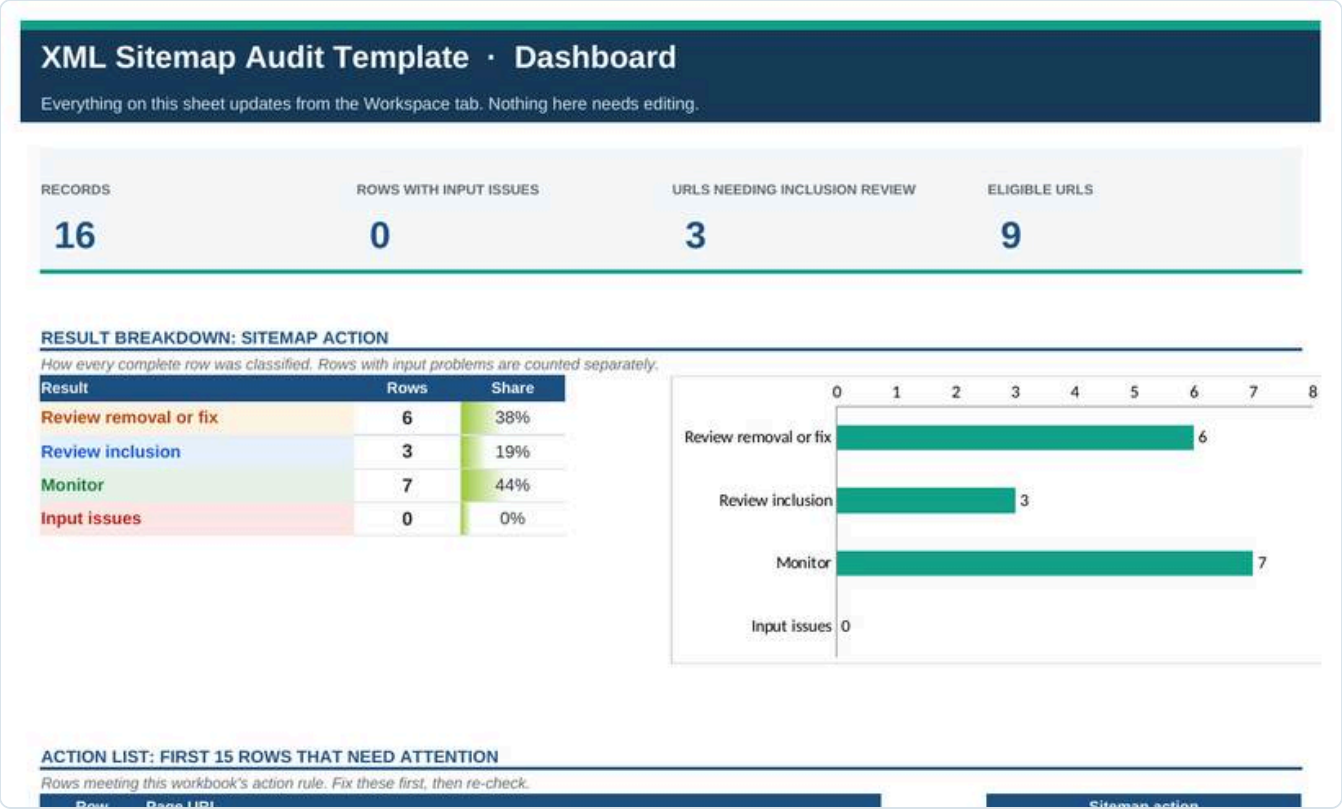
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 16 example rows.

16	0	3	9
Records	Rows with input issues	URLs needing inclusion review	Eligible URLs

The example sitemap contains a sort-parameter URL, a 301, a closed store page that 404s, a noindexed tag page and a robots-blocked category. Two valuable guides and a product page are missing entirely.

Result breakdown

Result	Rows	Share
Review removal or fix	6	38%
Review inclusion	3	19%
Monitor	7	44%
Input issues	0	0%



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Use a union of sitemap and crawl inventories. A crawl that never discovers a URL cannot establish that it is absent from a sitemap.

Limits. DataForSEO from_sitemap records crawler discovery context. Verify actual XML membership when auditing a specific sitemap.

Mistakes to avoid

Listing redirected URLs. Sitemaps should contain final destination URLs only.

Including noindex pages. Asking Google to index a page that says noindex is a contradiction.

Updating lastmod on every build. Only change lastmod when content meaningfully changes, or Google will learn to ignore it.

Tips from the field

Split sitemaps by type (products, categories, articles) to read indexing rates per type in Search Console.

Re-run after every migration and major release.

Use the indexability audit to investigate URLs that are eligible but not indexed.

Questions people ask

What should be in an XML sitemap?

Only canonical, indexable URLs that return 200 and that you want in search results.

Should noindex pages be in the sitemap?

No. Remove them, or remove the noindex if you want them indexed.

How many URLs can a sitemap have?

Up to 50,000 URLs or 50 MB uncompressed per file. Use a sitemap index for more.

Does a sitemap guarantee indexing?

No. It helps discovery and signals preference, but Google still decides what to index.

Templates that work well with this one

Indexability Audit Template
Check status, robots, noindex and canonical on every page you want indexed, then see exactly what to fix first.

Crawl Budget Analysis Template
Group verified Googlebot requests by URL pattern, measure crawl waste and pick the right fix for each pattern.

Redirect Mapping Template
Map every old URL to its new home and verify each redirect: one permanent hop, a 200 page, no noindex, matching canonical.

Hreflang Audit Template
Validate every hreflang relationship: alternate status, self-reference, return tags, canonical match and locale codes.

Programmatic SEO Checklist
QA every generated page for verified data, unique value, indexability, links and rendering before release.

Schema Markup Audit Template
Check presence, syntax, required fields, visible-content match and policy for every structured data type you ship.

Read the full tutorial online: **optimizationtheory.com/download-view/xml-sitemap-audit-template/**
Get all six templates in the **Technical SEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

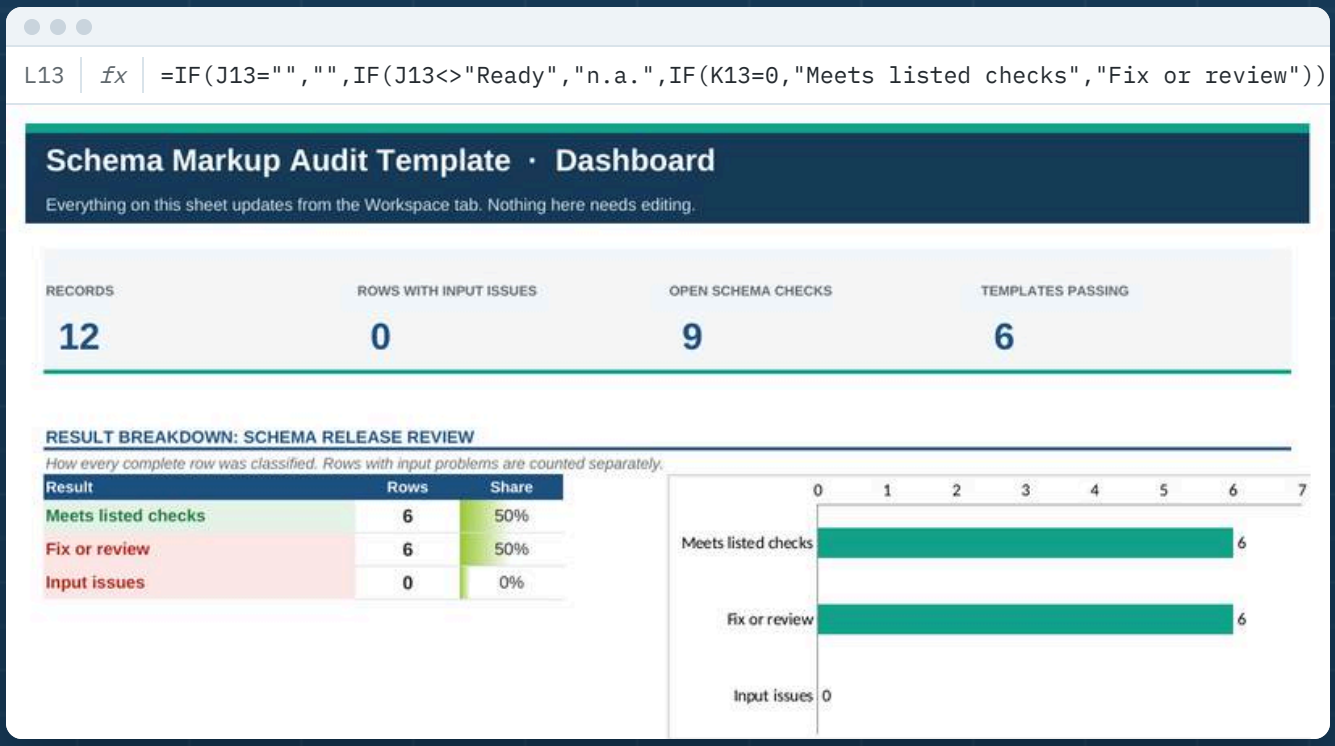
OptimizationTheory.com

Technical SEO Toolkit, resource 18

Schema Markup Audit Template

Check presence, syntax, required fields, visible-content match and policy for every structured data type you ship.

Built for the DataForSEO API: On-Page API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which pages and schema types are ready to release, and which fail on syntax, required properties, content mismatch or policy.

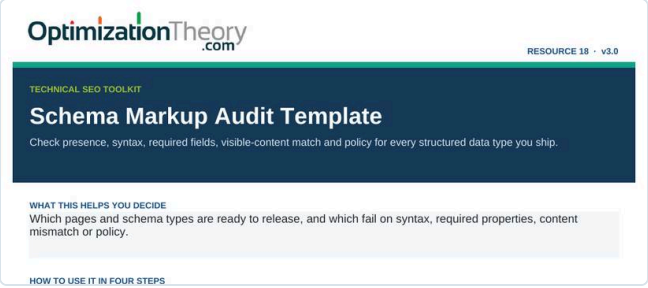
Structured data fails in three ways: it's broken (syntax errors), incomplete (missing required properties), or untrue (markup says something the page doesn't). The third is the one that gets sites into trouble, and validators can't catch it.

This schema markup audit template checks each URL and schema type against five conditions: markup present, syntax valid, required fields present, values match visible content, and a policy review. It counts failed checks and marks each Meets listed checks or Fix or review, so you have a release register, not just a validator screenshot.

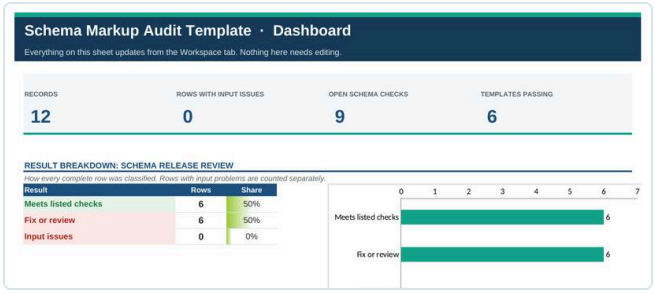
Who it's for

- SEOs and developers shipping JSON-LD templates
- Ecommerce teams with Product, Offer and Review markup
- Publishers using Article and Organization markup
- QA leads who need a sign-off record

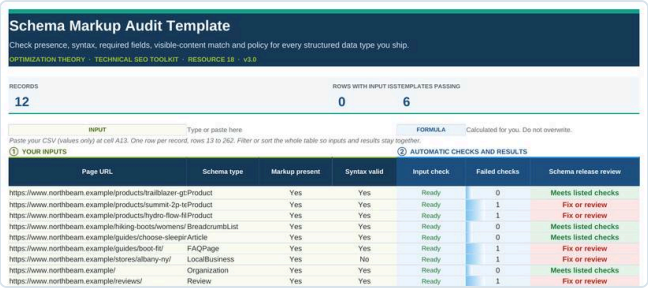
What's in the workbook



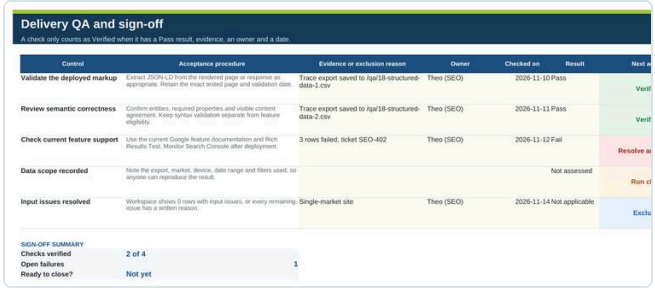
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Failed checks = 5 – (markup present + syntax valid + required fields + matches visible + policy review). Zero failures = Meets listed checks.

The key formula, as written in the workbook

```
=IF(J13="","",IF(J13<>"Ready","n.a.",IF(K13=0,"Meets listed checks","Fix or review")))
```

Result column	Plain-English formula	What it tells you
Failed checks	5-SUM(Markup present,Syntax valid,Required fields valid,Matches visible content,Eligibility reviewed)	Number of unmet implementation and review checks.
Schema release review	IF(Failed checks=0,"Meets listed checks","Fix or review")	Release review state, not a promise of rich results.

The results you'll see

Meets listed checks Fix or review

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

List URLs per template and type

One row per URL and schema type. Pick the type from the dropdown.

2

Validate syntax and required fields

Use the Rich Results Test and Schema Markup Validator. Record 1 or 0 for each.

3

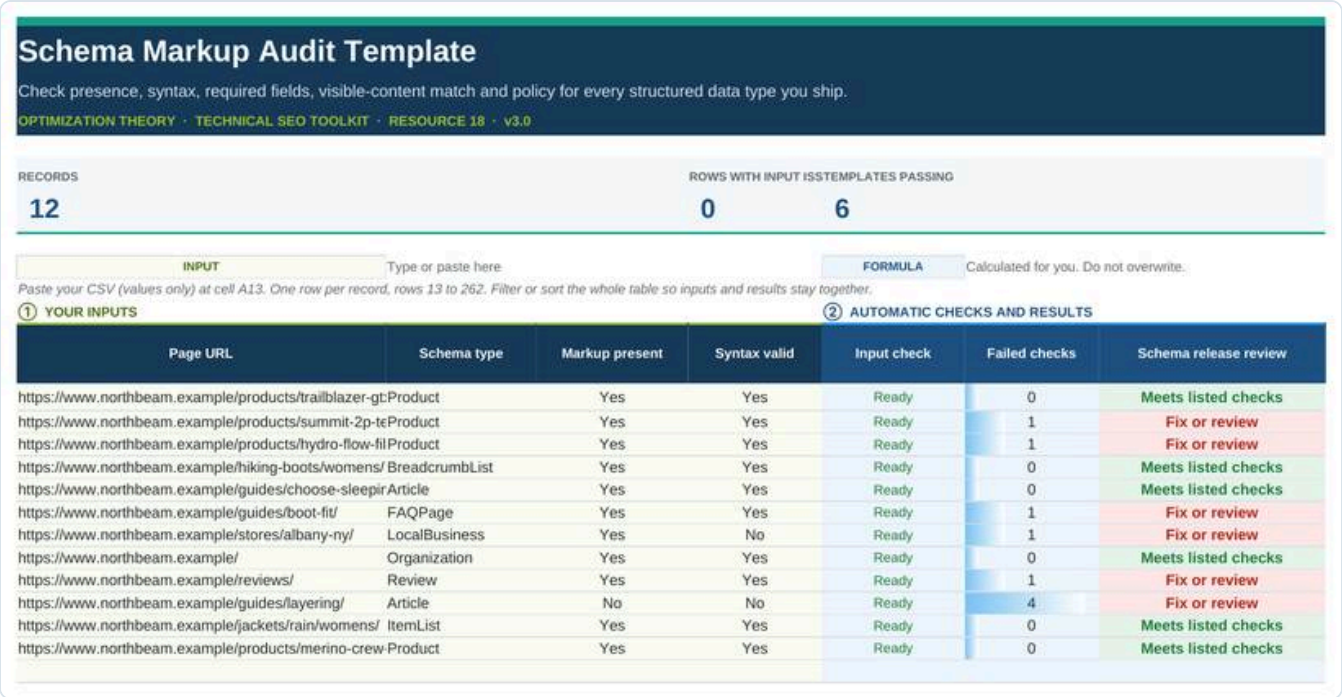
Compare with the visible page

Check that prices, ratings, dates and names in the markup match what users see.

4

Review policy

Check eligibility rules, e.g. self-serving reviews and FAQ rich result restrictions. Record the outcome.



Schema Markup Audit Template

Check presence, syntax, required fields, visible-content match and policy for every structured data type you ship.

OPTIMIZATION THEORY · TECHNICAL SEO TOOLKIT · RESOURCE 18 · v3.0

RECORDS	ROWS WITH INPUT ISS	TEMPLATES PASSING
12	0	6

INPUT — Type or paste here. FORMULA — Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS ② AUTOMATIC CHECKS AND RESULTS

Page URL	Schema type	Markup present	Syntax valid	Input check	Failed checks	Schema release review
https://www.northbeam.example/products/trailblazer-gt	Product	Yes	Yes	Ready	0	Meets listed checks
https://www.northbeam.example/products/summit-2p-te	Product	Yes	Yes	Ready	1	Fix or review
https://www.northbeam.example/products/hydro-flow-fil	Product	Yes	Yes	Ready	1	Fix or review
https://www.northbeam.example/hiking-boots/womens/	BreadcrumbList	Yes	Yes	Ready	0	Meets listed checks
https://www.northbeam.example/guides/choose-sleepir	Article	Yes	Yes	Ready	0	Meets listed checks
https://www.northbeam.example/guides/boot-fit/	FAQPage	Yes	Yes	Ready	1	Fix or review
https://www.northbeam.example/stores/albany-ny/	LocalBusiness	Yes	No	Ready	1	Fix or review
https://www.northbeam.example/	Organization	Yes	Yes	Ready	0	Meets listed checks
https://www.northbeam.example/reviews/	Review	Yes	Yes	Ready	1	Fix or review
https://www.northbeam.example/guides/layering/	Article	No	No	Ready	4	Fix or review
https://www.northbeam.example/jackets/rain/womens/	ItemList	Yes	Yes	Ready	0	Meets listed checks
https://www.northbeam.example/products/merino-crew	Product	Yes	Yes	Ready	0	Meets listed checks

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

This is a sign-off workflow. DataForSEO responses are the evidence you attach; the human checks stay manual by design.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 18 --csv --input my-filled.csv --output my
-inputs.csv
```

Fills automatically	You add
Page URL	Schema type, Markup present, Syntax valid, Required fields valid, Matches visible content, Eligibility reviewed, Evidence

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`url`	Page URL	Exact absolute URL. Keep case and query parameters unless a documented normalization rule applies.	DataForSEO: url
`schema_type`	Schema type	Actual schema.org type used for this page.	Your records or manual review
`markup_present`	Markup present	1 after inspecting rendered HTML or the relevant response. 1 = Yes, 0 = No.	Your records or manual review
`syntax_valid`	Syntax valid	1 after a schema syntax validator accepts the markup. 1 = Yes, 0 = No.	Your records or manual review
`required_fields`	Required fields valid	1 after validating fields for the intended feature, where applicable. 1 = Yes, 0 = No.	Your records or manual review
`matches_visible`	Matches visible content	1 only after a human verifies factual agreement with visible content. 1 = Yes, 0 = No.	Your records or manual review
`policy_review`	Eligibility reviewed	1 after reviewing feature eligibility and content policies. 1 = Yes, 0 = No.	Your records or manual review
`evidence`	Evidence	Link to a dated crawl, screenshot, ticket or source that another reviewer can inspect.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

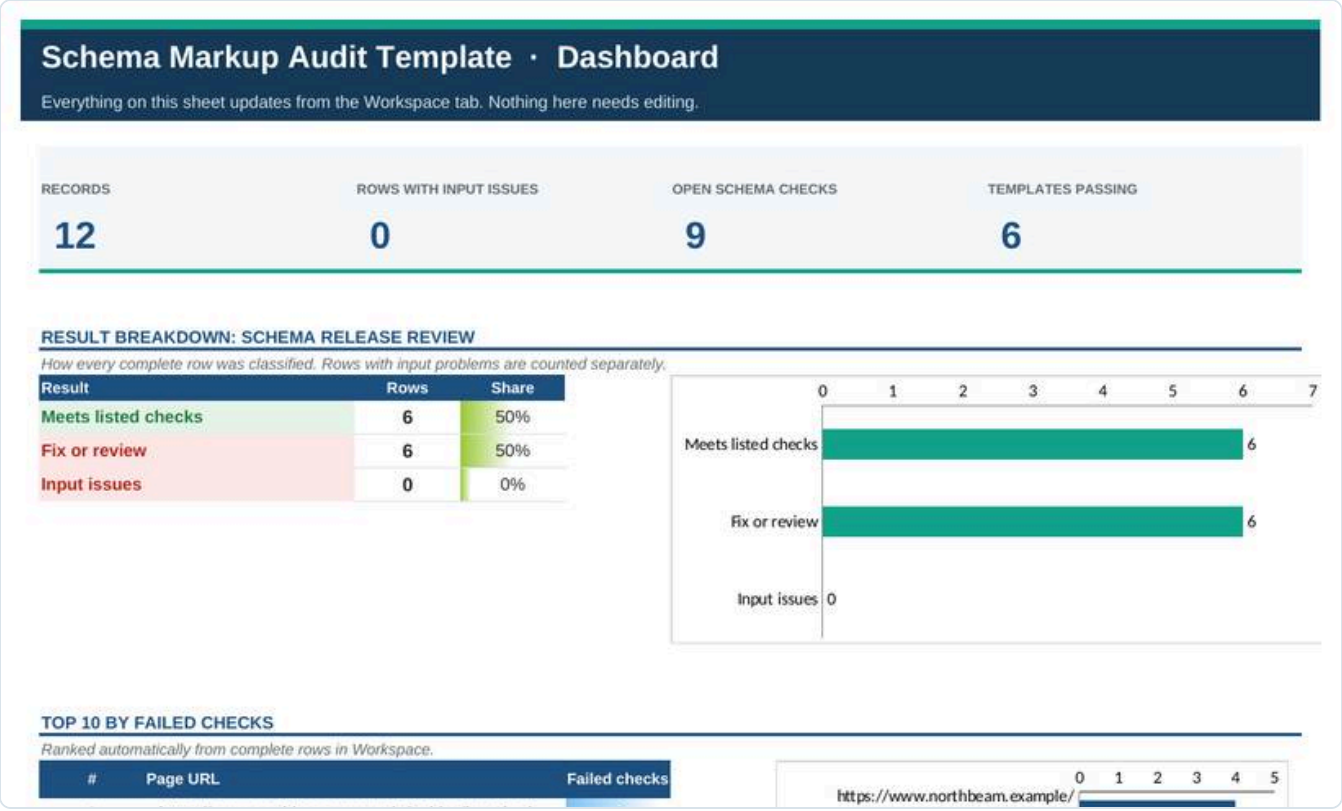
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 12 example rows.

12	0	9	6
Records	Rows with input issues	Open schema checks	Templates passing

The example catches a Product page whose markup says $39 while the page shows $44, a syntax error on a store page, and self-serving review markup that would be ignored or worse.

Top 10 by failed checks

#	Page URL	Failed checks
1	https://www.northbeam.example/guides/layering/	4
2	https://www.northbeam.example/reviews/	1
3	https://www.northbeam.example/stores/albany-ny/	1
4	https://www.northbeam.example/guides/boot-fit/	1
5	https://www.northbeam.example/products/hydro-flow-filter/	1



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

A syntax-valid entity can still be factually wrong or ineligible for a feature. Review those dimensions separately.

Limits. Generic markup presence is not type-specific validation. FAQ markup is not a universal rich-result or AI-citation tactic.

Mistakes to avoid

Marking up content users can't see. Markup must describe visible content. Hidden or invented values violate guidelines.

Chasing deprecated rich results. FAQ and HowTo rich results are heavily restricted. Markup can still help understanding, but don't expect the visual result.

Validating one URL per template. Data issues vary by page. Sample several URLs per template, especially products.

Tips from the field

Organization and LocalBusiness markup with sameAs links supports entity consistency.

Add schema checks to your release QA and the programmatic SEO checklist.

Recheck Product markup after price or stock feed changes.

Questions people ask

How do I audit schema markup?

Validate syntax, check required and recommended properties for each type, confirm the values match the visible page, and review eligibility policies.

What's the difference between the Rich Results Test and the Schema Markup Validator?

The Rich Results Test checks Google rich result eligibility; the Schema Markup Validator checks schema.org syntax generally.

Does structured data help AI search?

Accurate markup helps machines understand entities and facts on the page, which supports both search features and AI systems that read structured data.

Is structured data a ranking factor?

Not directly. It enables rich results and clearer understanding, which can improve click-through.

Templates that work well with this one

Brand Entity Consistency Audit
Compare your official brand facts with Wikidata, LinkedIn, GBP, Yelp and more, and log every correction request.

Programmatic SEO Checklist
QA every generated page for verified data, unique value, indexability, links and rendering before release.

Indexability Audit Template
Check status, robots, noindex and canonical on every page you want indexed, then see exactly what to fix first.

Answer Evidence Audit Template
Check every claim for a supporting source, original value, clarity and freshness, so AI answers can quote and cite it.

XML Sitemap Audit Template
Reconcile sitemap URLs against status, canonical, robots and noindex to see what to add, remove or fix.

Ecommerce SEO Prioritization Template
Rank product pages by potential orders, unit contribution and profit per hour, and catch out-of-stock or noindex SKUs.

Read the full tutorial online: **optimizationtheory.com/download-view/schema-markup-audit-template/**
Get all six templates in the **Technical SEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

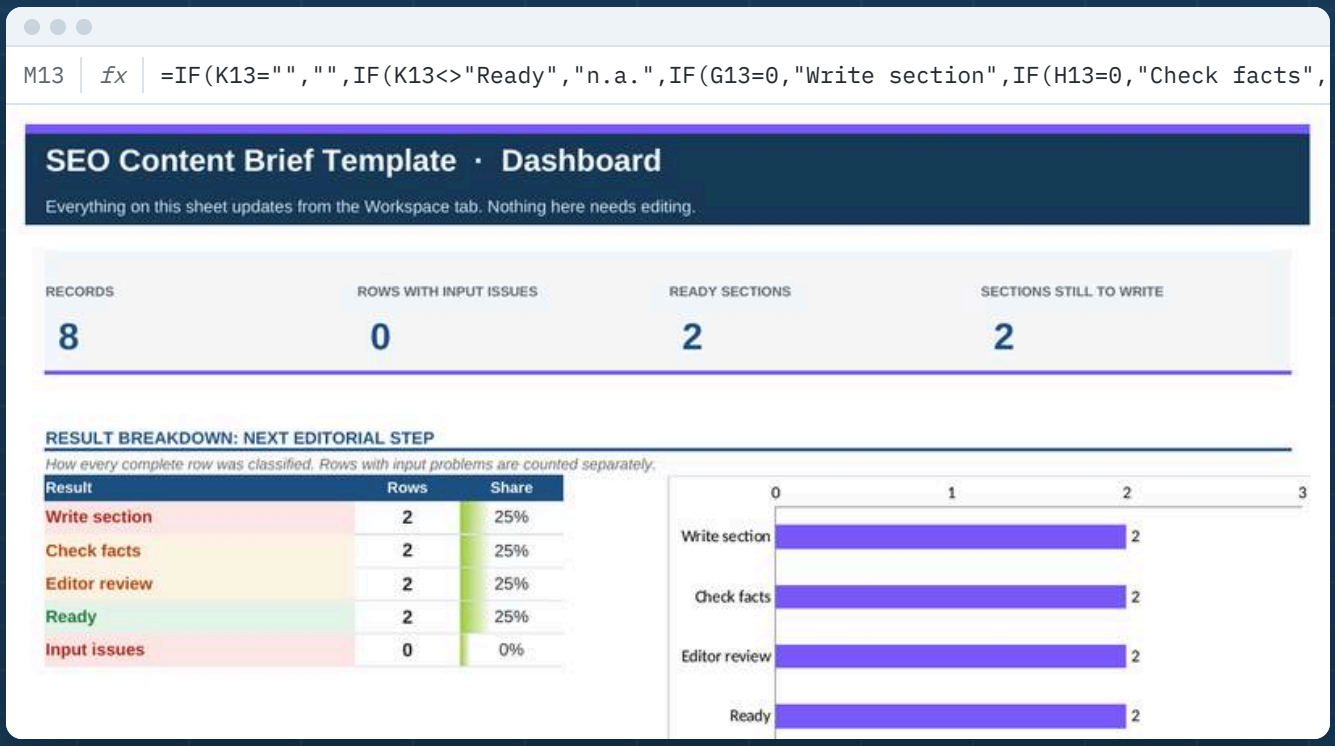
OptimizationTheory.com

Content SEO Toolkit, resource 19

SEO Content Brief Template

A content brief built for Google and AI answers: real questions, original evidence, sources and a three-step approval workflow.

Built for the DataForSEO API: Labs: Keyword Overview



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which sections of a page are ready to publish, and what each unfinished section needs next: writing, fact-checking or editor approval.

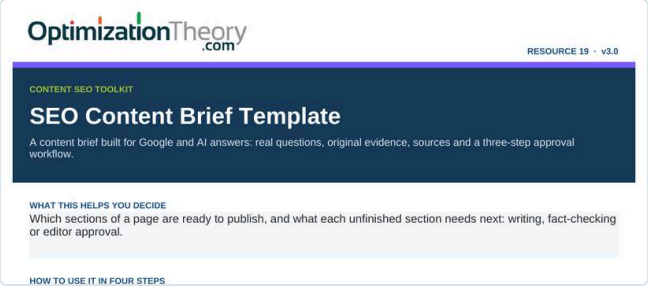
Most SEO content briefs are a keyword, a word count and a list of competitor headings. That produces content that looks like everything else on page one, which is exactly what neither Google nor AI answer engines want to cite.

This SEO content brief template is organized around the questions a real audience asks, the original evidence you'll bring to each one, and the source that supports it. Each section moves through drafted, fact-checked and approved, and the template tells you the next editorial step for every section so a brief doubles as a production tracker.

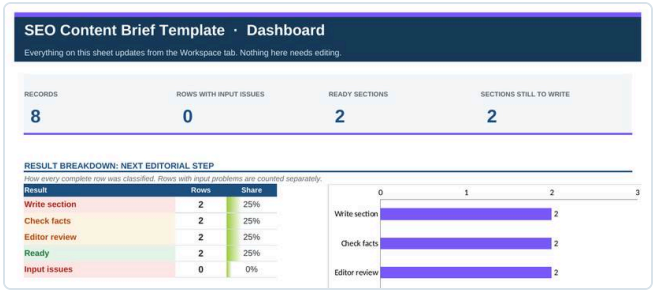
Who it's for

- Content leads briefing writers or freelancers
- SEOs building pages meant to be cited in AI answers
- Editors who need a fact-check trail
- Subject matter experts contributing original evidence

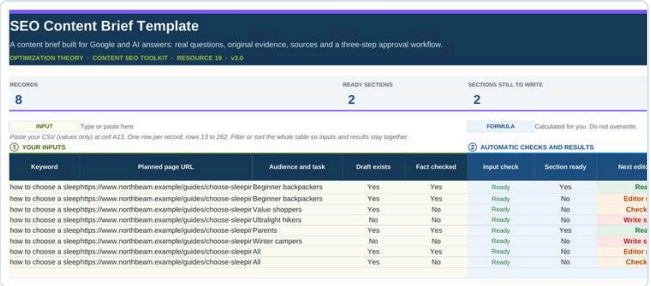
What's in the workbook



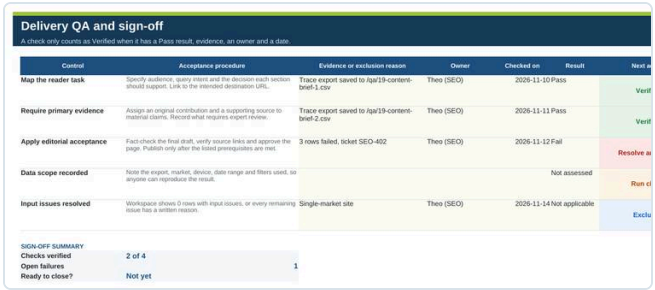
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Section ready = 1 only when drafted, fact-checked and approved are all 1. Next editorial step returns Write section, Check facts, Editor review or Ready in that order, so the first missing step is always the one shown.

The key formula, as written in the workbook

```
=IF(K13="","",IF(K13<>"Ready","n.a.",IF(G13=0,"Write section",IF(H13=0,"Check facts",IF(I13=0,"Edito
r review","Ready")))))
```

Result column	Plain-English formula	What it tells you
Section ready	IF(AND(Draft exists=1,Fact checked=1,Editor approved=1),1,0)	All three editorial steps completed with the required evidence fields.
Next editorial step	IF(Draft exists=0,"Write section",IF(Fact checked=0,"Check facts",IF(Editor approved=0,"Editor review","Ready")))	First incomplete step in the editorial workflow.

The results you'll see

Write section | Check facts | Editor review | Ready

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Start from questions, not headings

List the questions your audience actually asks: sales calls, support tickets, People Also Ask, your AI prompt panel.

2

Name the original evidence

For each question, write what you'll add that others can't: your data, tests, photos, expert quotes.

3

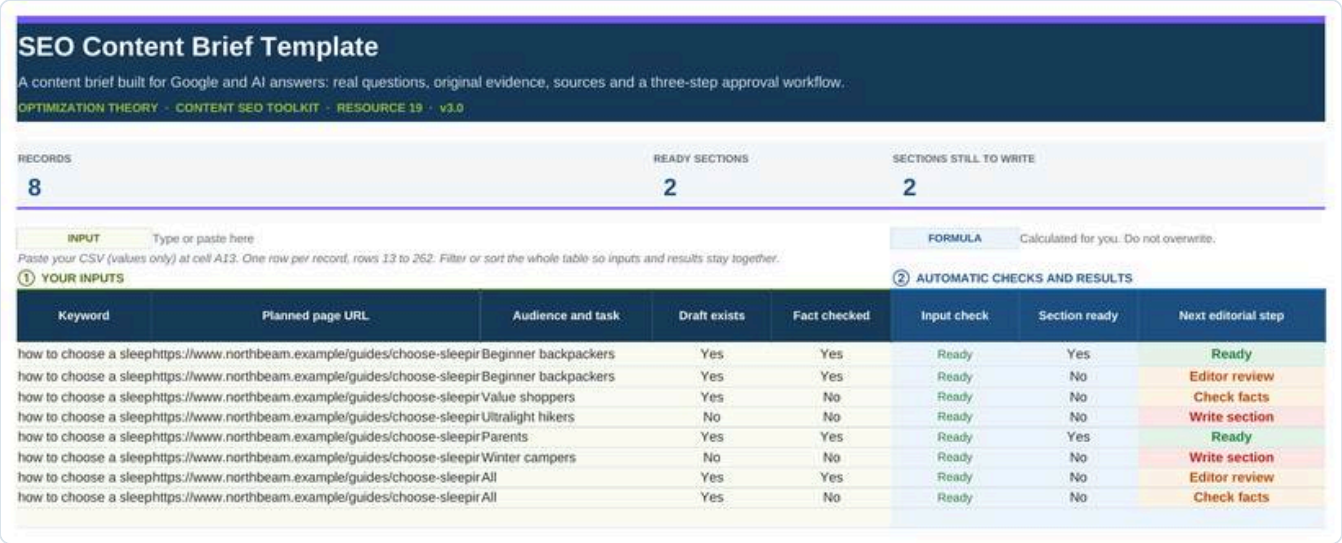
Attach a source

Every factual section needs a source: a URL, a document or an internal report.

4

Move sections through review

Mark drafted, fact-checked and approved as 1 or 0. The Next step column tells the team what's blocking each section.



SEO Content Brief Template

A content brief built for Google and AI answers: real questions, original evidence, sources and a three-step approval workflow.

OPTIMIZATION THEORY · CONTENT SEO TOOLKIT · RESOURCE 19 · v3.0

RECORDS	READY SECTIONS	SECTIONS STILL TO WRITE
8	2	2

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Keyword	Planned page URL	Audience and task	Draft exists	Fact checked	Input check	Section ready	Next editorial step
how to choose a sleep	https://www.northbeam.example/guides/choose-sleepi	Beginner backpackers	Yes	Yes	Ready	Yes	Ready
how to choose a sleep	https://www.northbeam.example/guides/choose-sleepi	Beginner backpackers	Yes	Yes	Ready	No	Editor review
how to choose a sleep	https://www.northbeam.example/guides/choose-sleepi	Value shoppers	Yes	No	Ready	No	Check facts
how to choose a sleep	https://www.northbeam.example/guides/choose-sleepi	Ultralight hikers	No	No	Ready	No	Write section
how to choose a sleep	https://www.northbeam.example/guides/choose-sleepi	Parents	Yes	Yes	Ready	Yes	Ready
how to choose a sleep	https://www.northbeam.example/guides/choose-sleepi	Winter campers	No	No	Ready	No	Write section
how to choose a sleep	https://www.northbeam.example/guides/choose-sleepi	All	Yes	Yes	Ready	No	Editor review
how to choose a sleep	https://www.northbeam.example/guides/choose-sleepi	All	Yes	No	Ready	No	Check facts

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Keyword Overview**: search volume, monthly history, difficulty and intent for a list of keywords.

This is a sign-off workflow. DataForSEO responses are the evidence you attach; the human checks stay manual by design.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/keyword_overview/live
[
  {
    "keywords": [
      "your keyword 1",
      "your keyword 2"
    ],
    "location_code": 2840,
    "language_code": "en"
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 19 --csv --input my-filled.csv --output my
-inputs.csv
```

Fills automatically	You add
Keyword	Planned page URL, Audience and task, Section question, Original evidence plan, Supporting source, Draft exists, Fact checked, Editor approved

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`keyword`	Keyword	Exact query in the selected country and language.	DataForSEO: keyword
`page_url`	Planned page URL	Approved new or existing destination.	Your records or manual review
`audience`	Audience and task	Who needs the page and what decision they need to make.	Your records or manual review
`question`	Section question	One actual reader question to answer in this section.	Your records or manual review
`original_evidence`	Original evidence plan	Named dataset, expert input, demonstration or first-hand example.	Your records or manual review
`source_url`	Supporting source	Primary source to verify this section. Use an accessible URL.	Your records or manual review
`drafted`	Draft exists	1 after the section is written. 1 = Yes, 0 = No.	Your records or manual review
`fact_checked`	Fact checked	1 after claims and calculations are checked. 1 = Yes, 0 = No.	Your records or manual review
`approved`	Editor approved	1 after the editor accepts the section. 1 = Yes, 0 = No.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

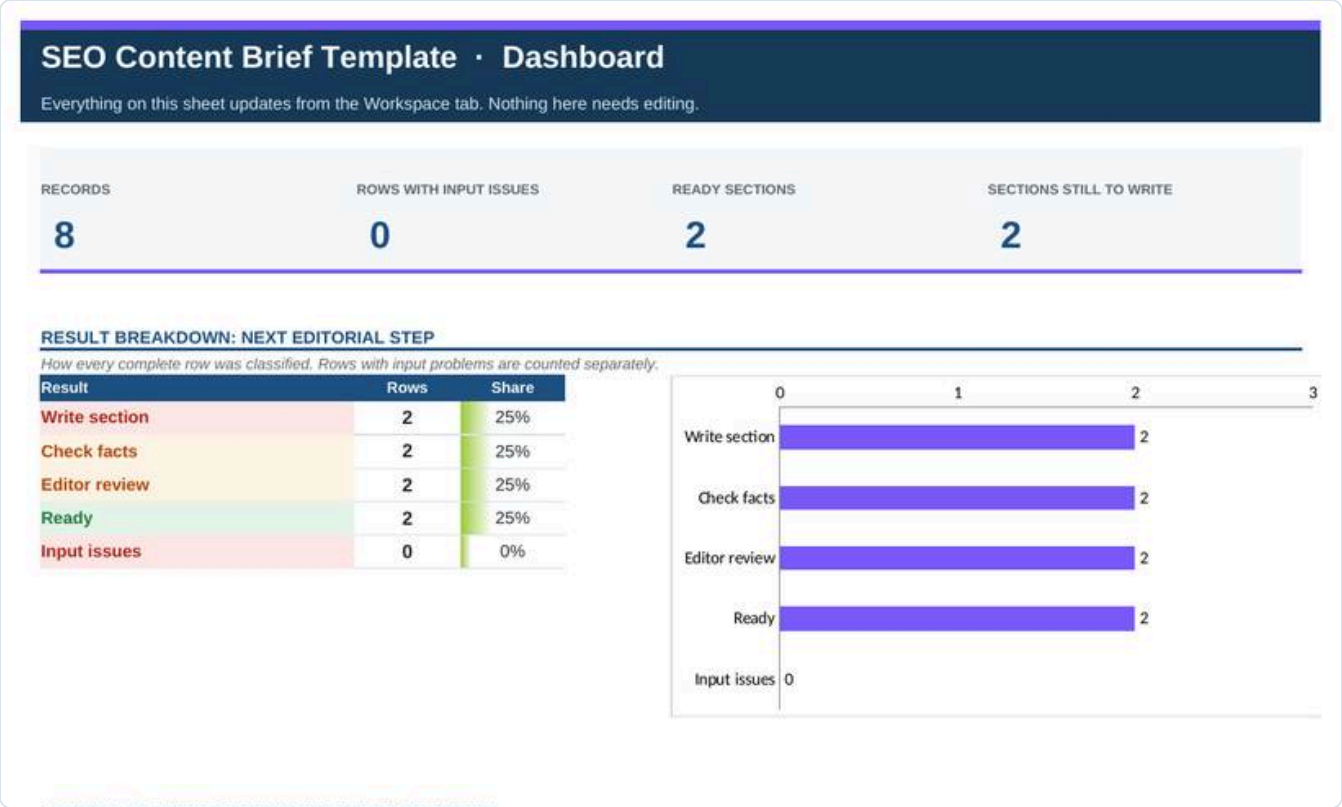
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 8 example rows.

8	0	2	2
Records	Rows with input issues	Ready sections	Sections still to write

In the example sleeping bag guide, two sections are fully ready, two still need writing, two are waiting on fact checks and two are with the editor. That's a realistic picture of a brief halfway through production.

Result breakdown

Result	Rows	Share
Write section	2	25%
Check facts	2	25%
Editor review	2	25%
Ready	2	25%
Input issues	0	0%



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

The brief is complete when it reduces guessing for the writer and defines an inspectable answer.

Limits. Keyword volume does not prove a section belongs in the brief. No text pattern guarantees an AI citation.

Mistakes to avoid

Copying competitor headings. If your outline is the average of page one, your page will be too. Lead with questions and evidence.

No original evidence. AI answers cite pages that add something verifiable. A brief without a field test, data point or expert input produces a page with nothing to cite.

Skipping fact checks. Unchecked claims are the fastest way to lose trust, and the hardest to fix after publishing.

Tips from the field

Pull questions from the AI prompt research template so the brief targets AI answers too.

Run the answer evidence audit on the published page.

Keep one brief per URL and update it when you refresh the page.

Questions people ask

What should an SEO content brief include?

The target keyword and URL, the audience, the questions to answer, the original evidence for each, supporting sources, and a review workflow. This template adds a section-level readiness tracker.

How is a GEO content brief different?

It puts more weight on answering specific questions clearly, citing sources and adding original, verifiable evidence, which is what AI answer engines tend to quote and cite.

How long should a content brief be?

As long as it needs to give a writer clear direction. One row per question or section usually works well.

Can freelancers use this template?

Yes. Share the XLSX or upload it to Google Sheets; the workflow columns make handoffs clear.

Templates that work well with this one

Answer Evidence Audit Template

Check every claim for a supporting source, original value, clarity and freshness, so AI answers can quote and cite it.

AI Prompt Research Template

Turn real customer tasks and keywords into a weighted prompt panel for ChatGPT, Perplexity, Gemini and AI Overviews.

SEO Content Calendar Template

Track owners, due dates and estimated vs completed hours, and flag overdue work automatically.

Content Audit Template

Score every URL by lost clicks, conversions and links, choose keep, refresh, merge or retire, and catch the risky calls.

SERP Overlap Keyword Clustering Template

Decide whether two keywords belong on one page or two by measuring how much their Google results overlap.

Keyword Mapping Template

Assign every keyword to exactly one URL and catch conflicting assignments before they become cannibalization.

Read the full tutorial online: **optimizationtheory.com/download-view/seo-content-brief-template/**
Get all six templates in the **Content SEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

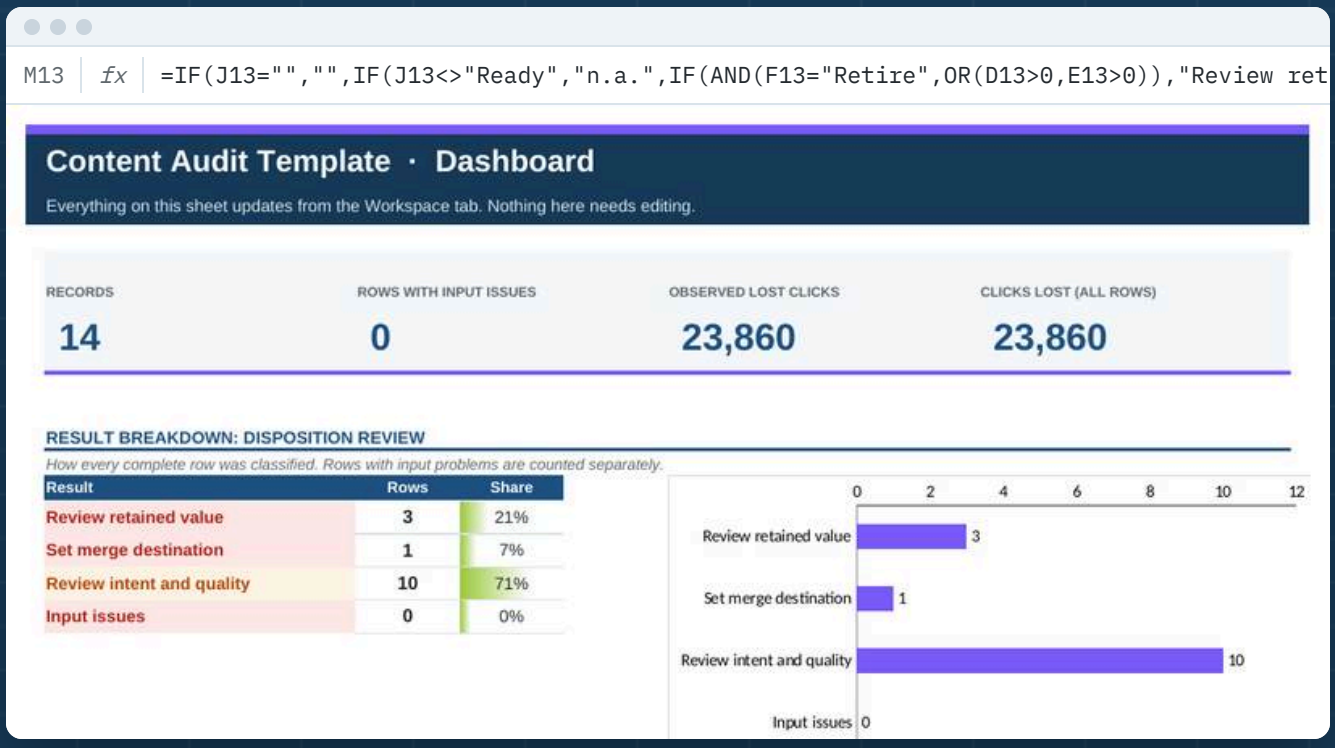
OptimizationTheory.com

Content SEO Toolkit, resource 20

Content Audit Template

Score every URL by lost clicks, conversions and links, choose keep, refresh, merge or retire, and catch the risky calls.

Built for the DataForSEO API: On-Page API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

What to do with each existing page (keep, refresh, merge or retire) and which decisions would throw away conversions, links or a merge destination.

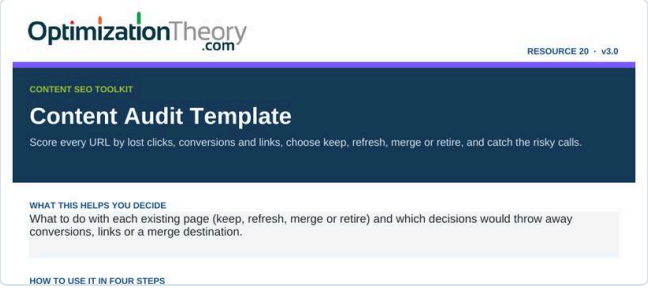
Content audits end in one of two places: a beautifully scored spreadsheet nobody acts on, or a mass deletion that takes good pages down with the bad. The difference is decision rules that protect value.

This content audit template records clicks before and now, conversions, referring domains, your chosen disposition and destination, and the hours to act. It calculates observed lost clicks and lost clicks per work hour, then reviews each decision: retiring a page with conversions or links is flagged Review retained value, a merge without a destination is flagged Set merge destination.

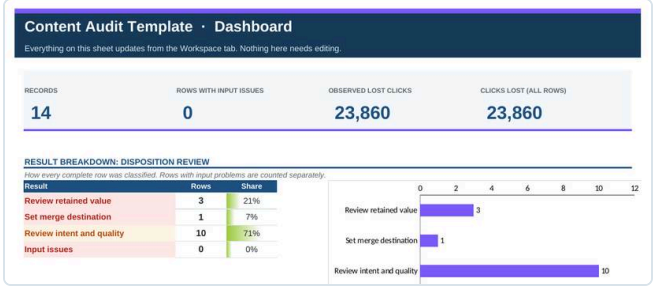
Who it's for

- Content teams pruning or refreshing a blog
- SEOs recovering from a helpful content or core update
- Ecommerce sites cleaning up old collections and guides
- Teams planning a migration who want to cut dead weight first

What's in the workbook



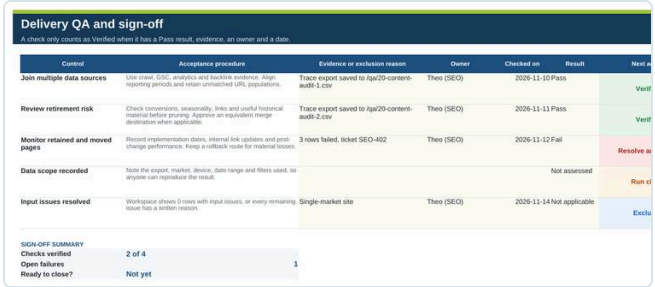
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 1,000 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Observed lost clicks = clicks before – clicks now (never negative). Lost clicks per hour = lost clicks ÷ effort. Disposition review flags Retire with conversions or links, and Merge with destination N/A.

The key formula, as written in the workbook

```
=IF(J13="","",IF(J13<>"Ready","n.a.",IF(AND(F13="Retire",OR(D13>0,E13>0)),"Review retained value",IF(AND(F13="Merge",G13="N/A"),"Set merge destination","Review intent and quality"))))
```

Result column	Plain-English formula	What it tells you
Observed lost clicks	MAX(0,Earlier clicks-Current clicks)	Positive loss only. Gains display zero lost clicks.
Lost clicks / work hour	Observed lost clicks ÷ Work hours	Triage of historical loss relative to estimated effort.
Disposition review	IF(AND(Disposition="Retire",OR(Current conversions>0,Referring domains>0)),"Review retained value",IF(AND(Disposition="Merge",Merge destination="N ÷ A"),"Set merge destination","Review intent and quality"))	Protects observed conversion/link value and requires a merge destination.

The results you'll see

Review retained value | Set merge destination | Review intent and quality

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Build the inventory

Export every content URL with clicks for two comparable periods (e.g. this year vs last year), conversions and referring domains.

2

Pick a disposition

Keep, Refresh, Merge or Retire from the dropdown. Merges need a destination URL.

3

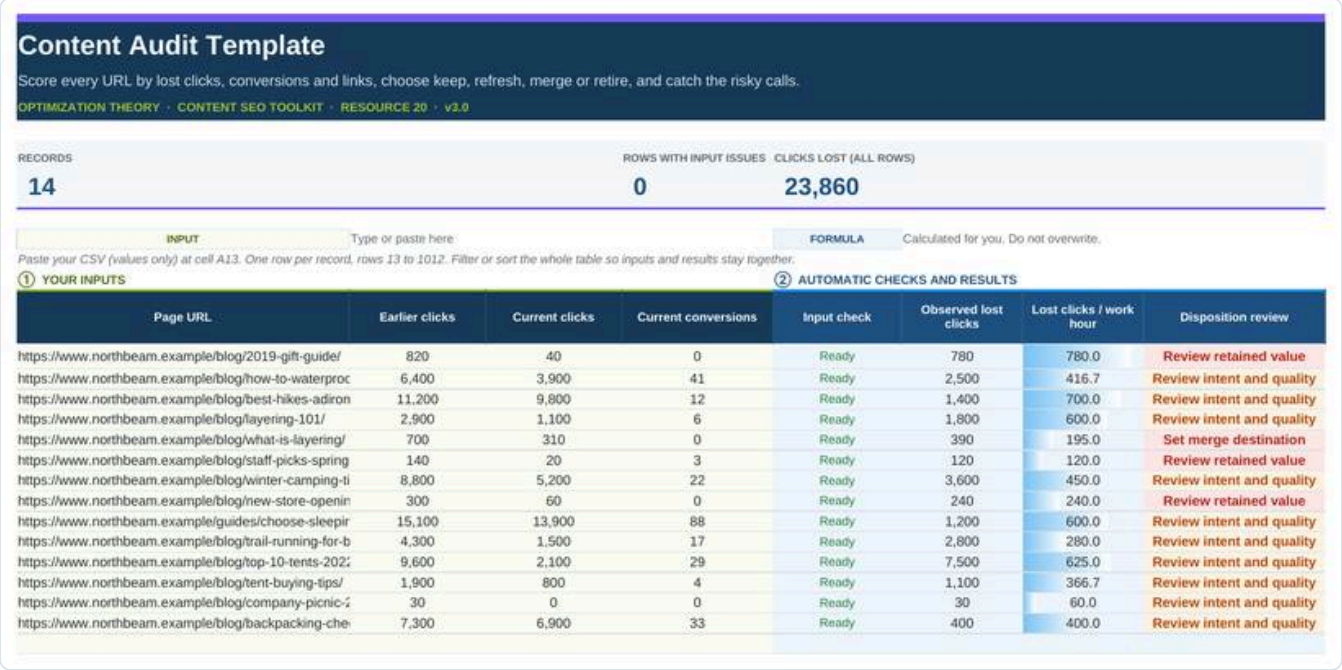
Estimate effort

Hours to refresh, merge or redirect. This ranks refresh work by lost clicks per hour.

4

Clear the review flags

Work the Dashboard action list before deleting anything. Then send merges and retirements to the redirect map.



Content Audit Template

Score every URL by lost clicks, conversions and links, choose keep, refresh, merge or retire, and catch the risky calls.

OPTIMIZATION THEORY · CONTENT SEO TOOLKIT · RESOURCE 20 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	CLICKS LOST (ALL ROWS)
14	0	23,860

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 1012. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Page URL	Earlier clicks	Current clicks	Current conversions	Input check	Observed lost clicks	Lost clicks / work hour	Disposition review
https://www.northbeam.example/blog/2019-gift-guide/	820	40	0	Ready	780	780.0	Review retained value
https://www.northbeam.example/blog/how-to-waterproc	6,400	3,900	41	Ready	2,500	416.7	Review intent and quality
https://www.northbeam.example/blog/best-hikes-adiron	11,200	9,800	12	Ready	1,400	700.0	Review intent and quality
https://www.northbeam.example/blog/layering-101/	2,900	1,100	6	Ready	1,800	600.0	Review intent and quality
https://www.northbeam.example/blog/what-is-layering/	700	310	0	Ready	390	195.0	Set merge destination
https://www.northbeam.example/blog/staff-picks-spring	140	20	3	Ready	120	120.0	Review retained value
https://www.northbeam.example/blog/winter-camping-ti	8,800	5,200	22	Ready	3,600	450.0	Review intent and quality
https://www.northbeam.example/blog/new-store-openin	300	60	0	Ready	240	240.0	Review retained value
https://www.northbeam.example/guides/choose-sleepir	15,100	13,900	88	Ready	1,200	600.0	Review intent and quality
https://www.northbeam.example/blog/trail-running-for-b	4,300	1,500	17	Ready	2,800	280.0	Review intent and quality
https://www.northbeam.example/blog/top-10-tents-202	9,600	2,100	29	Ready	7,500	625.0	Review intent and quality
https://www.northbeam.example/blog/tent-buying-tips/	1,900	800	4	Ready	1,100	366.7	Review intent and quality
https://www.northbeam.example/blog/company-picnic-2	30	0	0	Ready	30	60.0	Review intent and quality
https://www.northbeam.example/blog/backpacking-che	7,300	6,900	33	Ready	400	400.0	Review intent and quality

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 20 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Page URL	Earlier clicks, Current clicks, Current conversions, Referring domains, Disposition, Merge destination, Work hours

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`url`	Page URL	Exact absolute URL. Keep case and query parameters unless a documented normalization rule applies.	DataForSEO: url
`clicks_before`	Earlier clicks	GSC clicks in a complete comparable window.	Your records or manual review
`clicks_now`	Current clicks	GSC clicks in the matching current window.	Your records or manual review
`conversions`	Current conversions	Observed conversions for the same current period.	Your records or manual review
`referring_domains`	Referring domains	Unique URL-level referring domains.	Your records or manual review
`disposition`	Disposition	Keep, Refresh, Merge or Retire after manual quality and relevance review.	Your records or manual review
`destination`	Merge destination	Required when merging. Otherwise enter N/A.	Your records or manual review
`effort_hours`	Work hours	Estimated implementation hours, greater than zero.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

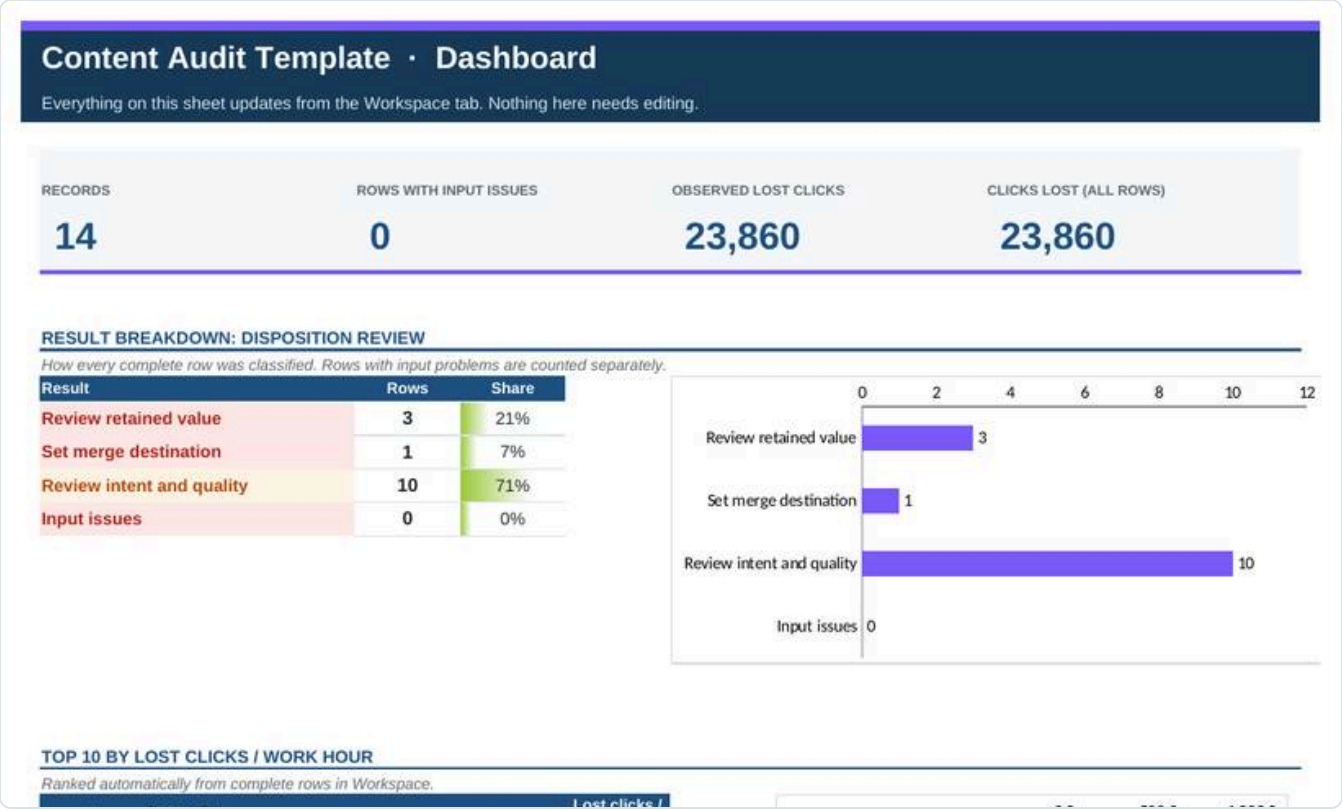
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 14 example rows.

14	0	23,860	23,860
Records	Rows with input issues	Observed lost clicks	Clicks lost (all rows)

The example's biggest loss is an old 'top tents of 2022' post that dropped 7,500 clicks and is a straightforward refresh. Three retirements are flagged because the pages still have conversions or links, and one merge has no destination yet.

Top 10 by lost clicks / work hour

#	Page URL	Lost clicks / work hour
1	https://www.northbeam.example/blog/2019-gift-guide/	780.0
2	https://www.northbeam.example/blog/best-hikes-adirondacks/	700.0
3	https://www.northbeam.example/blog/top-10-tents-2022/	625.0
4	https://www.northbeam.example/guides/choose-sleeping-bag/	600.0
5	https://www.northbeam.example/blog/layering-101/	600.0



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Low traffic alone is insufficient evidence for deletion. Some pages serve conversions, support or legal needs.

Limits. Traffic changes can reflect demand or SERP shifts. Use resource 21 before attributing loss to content age.

Mistakes to avoid

Deleting low-traffic pages blindly. Low traffic doesn't mean low value. Pages with links or conversions should be merged or redirected.

Refreshing the date without the content. Changing the date without meaningful updates doesn't fix decay and can erode trust.

Merging without redirects. Every merged URL needs a 301 to the destination, or you lose its signals.

Tips from the field

Run the content decay template on Refresh candidates to understand why they declined.

Use the cannibalization checker to find merge pairs.

Schedule refreshes in the content calendar so the audit turns into work.

Questions people ask

What is a content audit?

A systematic review of existing content to decide what to keep, update, merge or remove, based on performance, quality and business value.

When should I delete content?

When a page has no traffic, no links, no conversions and no strategic purpose. Otherwise merge or redirect it.

How often should I run a content audit?

Annually for most sites, with quarterly checks on high-value pages.

What's the difference between refresh and merge?

Refresh improves a page in place. Merge combines overlapping pages into one stronger page and redirects the rest.

Templates that work well with this one

Content Decay Analysis Template

Separate lost impressions, lower CTR and falling demand, so you refresh the pages that really decayed.

Keyword Cannibalization Checker Template

Find queries splitting clicks across two URLs, check whether intent really overlaps and decide whether to consolidate.

Redirect Mapping Template

Map every old URL to its new home and verify each redirect: one permanent hop, a 200 page, no noindex, matching canonical.

SEO Content Calendar Template

Track owners, due dates and estimated vs completed hours, and flag overdue work automatically.

SEO Content Brief Template

A content brief built for Google and AI answers: real questions, original evidence, sources and a three-step approval workflow.

Site Migration URL Inventory Template

Inventory every legacy URL with its traffic, profit and links, assign a destination and catch risky retirements.

Read the full tutorial online: **optimizationtheory.com/download-view/content-audit-template/**
Get all six templates in the **Content SEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

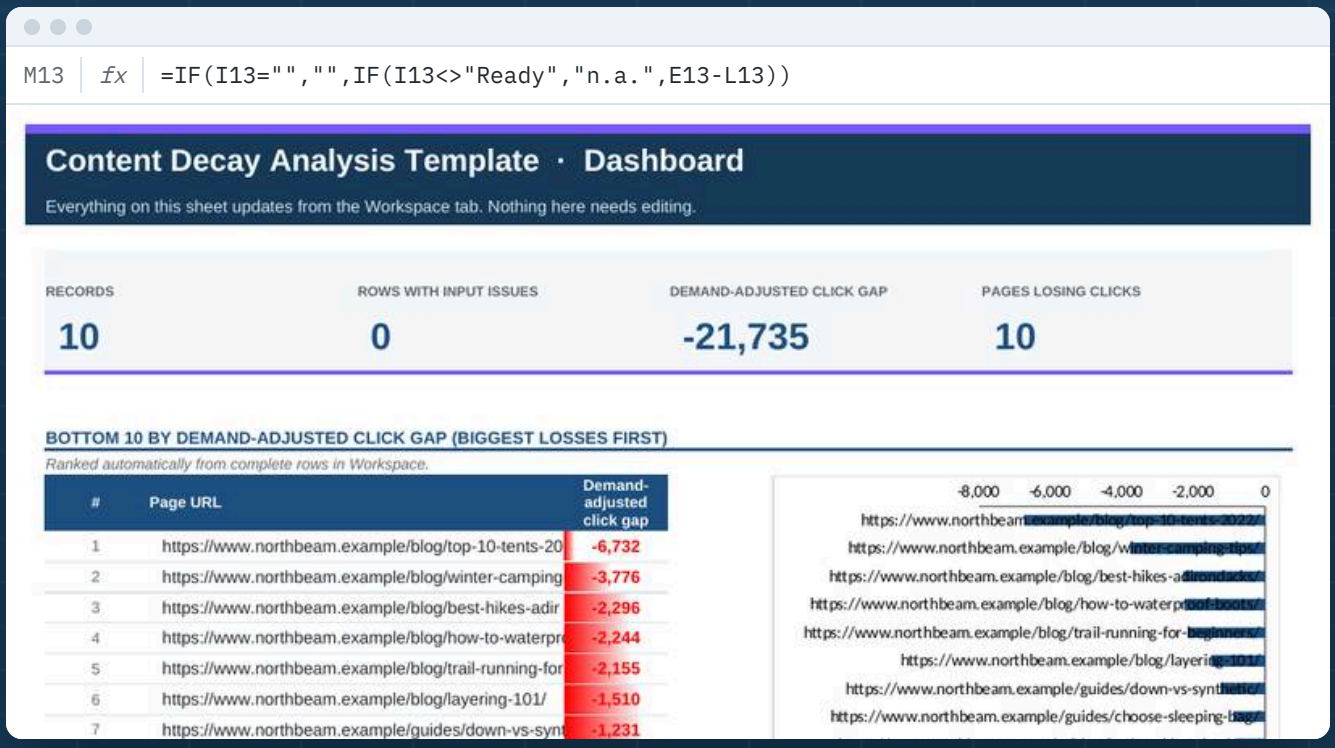
OptimizationTheory.com

Content SEO Toolkit, resource 21

Content Decay Analysis Template

Separate lost impressions, lower CTR and falling demand, so you refresh the pages that really decayed.

Built for the DataForSEO API: Labs: Ranked Keywords



Jourdan Rombough, optimizationtheory.com

What this template decides

Whether a page lost clicks because it lost rankings, lost CTR or the market lost interest, and how big the demand-adjusted gap is.

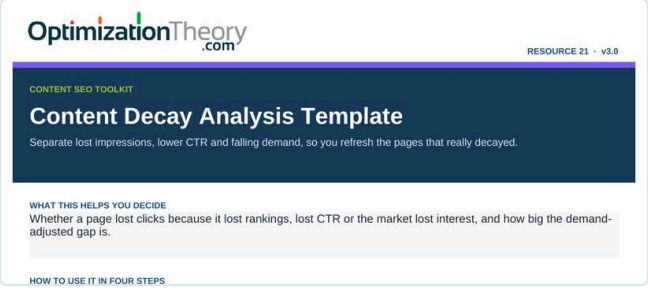
Traffic decline is a symptom with several causes. A page can lose clicks because it dropped in rankings (fewer impressions), because something on the SERP is stealing the click (lower CTR), or because people simply search for the topic less. Each cause needs a different fix, and only one of them is fixed by rewriting the page.

This content decay analysis template compares impressions and clicks for two periods, calculates CTR for each, and adjusts the earlier clicks by a demand index so you can see the gap that remains after market changes. Pages with a large negative gap are your real decay.

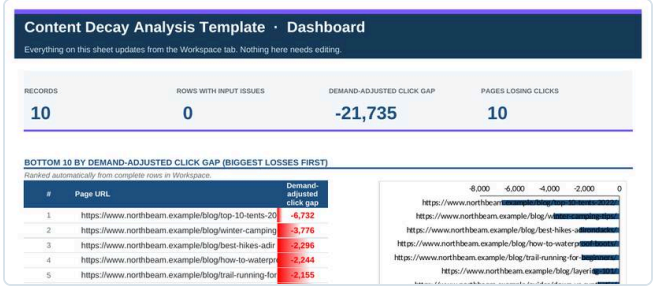
Who it's for

- Content teams deciding which posts to refresh
- SEOs explaining a traffic decline to stakeholders
- Analysts separating SERP feature impact from ranking loss
- Publishers with large archives

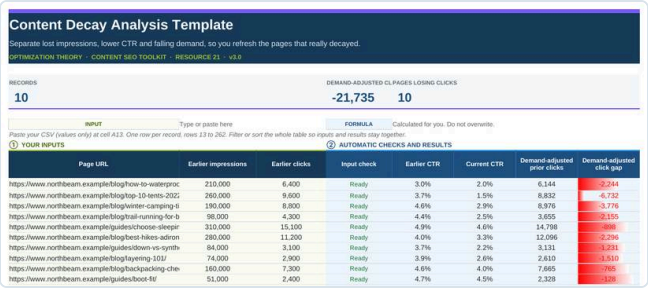
What's in the workbook



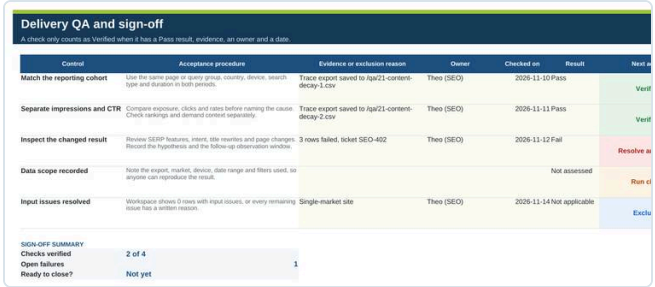
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Earlier CTR = clicks before ÷ impressions before. Current CTR = clicks now ÷ impressions now. Demand-adjusted prior clicks = clicks before × demand index. Click gap = clicks now – adjusted prior clicks.

The key formula, as written in the workbook

```
=IF(I13="","",IF(I13<>"Ready","n.a.",E13-L13))
```

Result column	Plain-English formula	What it tells you
Earlier CTR	Earlier clicks ÷ Earlier impressions	Earlier clicks divided by earlier impressions.
Current CTR	Current clicks ÷ Current impressions	Current clicks divided by current impressions.
Demand-adjusted prior clicks	Earlier clicks × Demand multiplier	Earlier clicks scaled by the stated independent demand proxy.
Demand-adjusted click gap	Current clicks-Demand-adjusted prior clicks	Observed clicks minus demand-adjusted earlier clicks.

How to use it, step by step

1

Export two comparable periods

Pull impressions and clicks per page from Search Console for the same months in two years.

2

Add a demand index

Use Google Trends or keyword volume to estimate demand now vs then (0.9 = demand fell 10%).

3

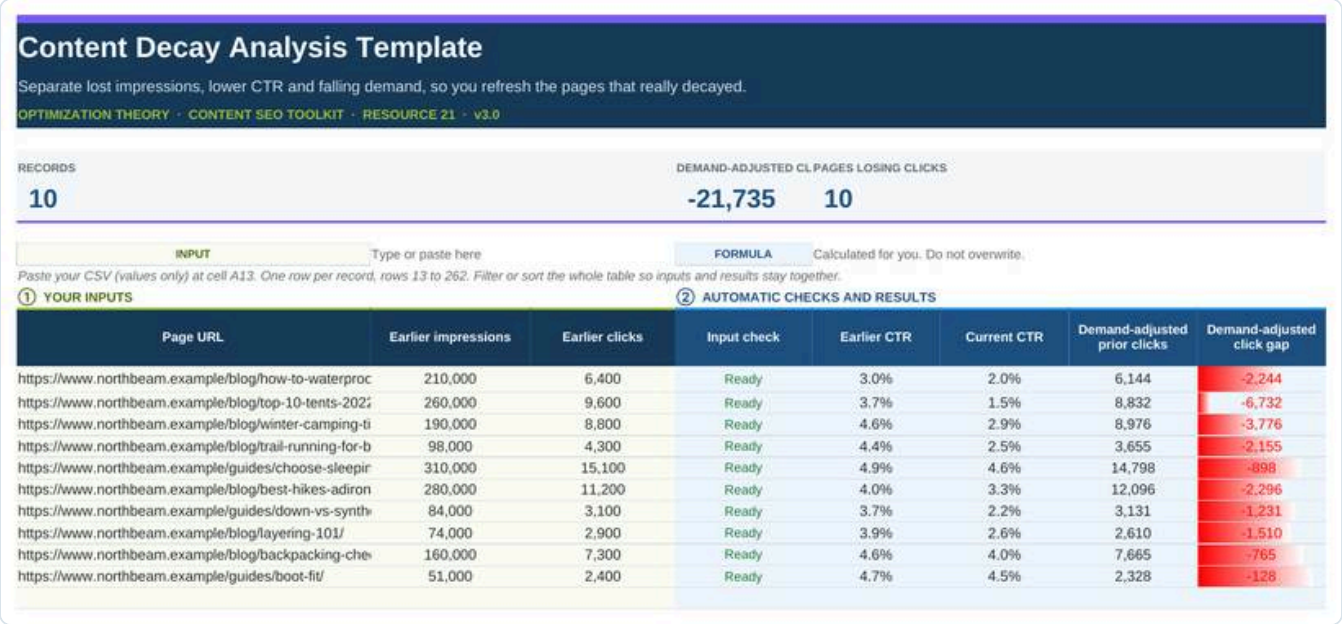
Compare CTR and impressions

Impressions falling means visibility loss; CTR falling with stable impressions means the SERP changed.

4

Refresh the true decayers

Sort by demand-adjusted gap. Refresh visibility losers; rethink titles and snippets for CTR losers.



Content Decay Analysis Template

Separate lost impressions, lower CTR and falling demand, so you refresh the pages that really decayed.

OPTIMIZATION THEORY · CONTENT SEO TOOLKIT · RESOURCE 21 · v3.0

RECORDS 10

DEMAND-ADJUSTED CL PAGES LOSING CLICKS -21,735 10

INPUT Type or paste here FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS ② AUTOMATIC CHECKS AND RESULTS

Page URL	Earlier impressions	Earlier clicks	Input check	Earlier CTR	Current CTR	Demand-adjusted prior clicks	Demand-adjusted click gap
https://www.northbeam.example/blog/how-to-waterproc	210,000	6,400	Ready	3.0%	2.0%	6,144	-2,244
https://www.northbeam.example/blog/top-10-tents-202	260,000	9,600	Ready	3.7%	1.5%	8,832	-6,732
https://www.northbeam.example/blog/winter-camping-ti	190,000	8,800	Ready	4.6%	2.9%	8,976	-3,776
https://www.northbeam.example/blog/trail-running-for-b	98,000	4,300	Ready	4.4%	2.5%	3,655	-2,155
https://www.northbeam.example/guides/choose-sleepir	310,000	15,100	Ready	4.9%	4.6%	14,798	-898
https://www.northbeam.example/blog/best-hikes-adiron	280,000	11,200	Ready	4.0%	3.3%	12,096	-2,296
https://www.northbeam.example/guides/down-vs-synth	84,000	3,100	Ready	3.7%	2.2%	3,131	-1,231
https://www.northbeam.example/blog/layering-101/	74,000	2,900	Ready	3.9%	2.6%	2,610	-1,510
https://www.northbeam.example/blog/backpacking-che	160,000	7,300	Ready	4.6%	4.0%	7,665	-765
https://www.northbeam.example/guides/boot-fit/	51,000	2,400	Ready	4.7%	4.5%	2,328	-128

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Ranked Keywords**: every keyword a domain ranks for, with its ranking URL, position and volume.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/ranked_keywords/live
[
  {
    "target": "yourdomain.com",
    "location_code": 2840,
    "language_code": "en",
    "limit": 1000
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 21 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Page URL	Earlier impressions, Earlier clicks, Current impressions, Current clicks, Demand multiplier, Work hours

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`url`	Page URL	Exact absolute URL. Keep case and query parameters unless a documented normalization rule applies.	DataForSEO: url
`impressions_before`	Earlier impressions	GSC impressions for a complete comparison window.	Your records or manual review
`clicks_before`	Earlier clicks	Clicks for the same earlier window.	Your records or manual review
`impressions_now`	Current impressions	GSC impressions for the current comparable window.	Your records or manual review
`clicks_now`	Current clicks	Clicks for the current window.	Your records or manual review
`demand_index`	Demand multiplier	Independent demand proxy current / earlier for this topic. 1 means unchanged.	Your records or manual review
`effort_hours`	Work hours	Estimated implementation hours, greater than zero.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

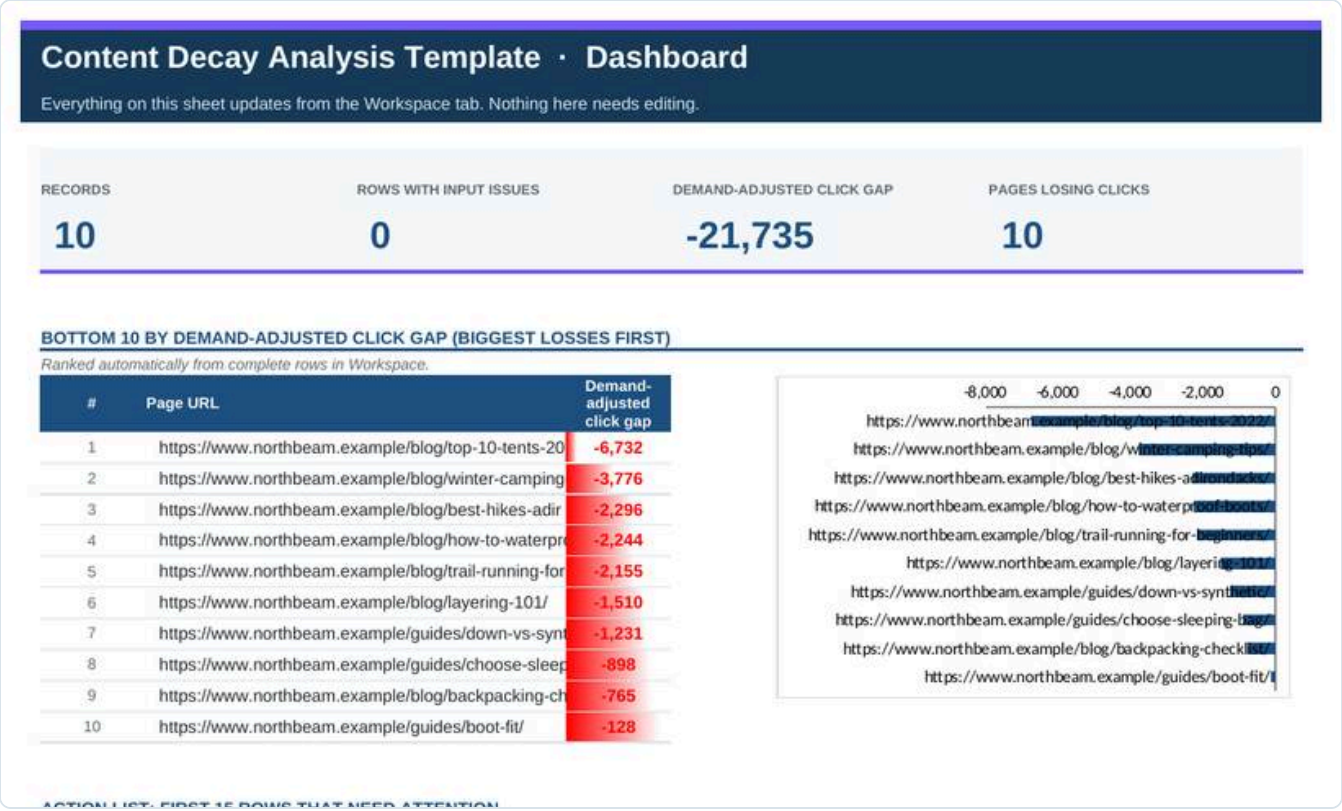
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 10 example rows.

10	0	-21,735	10
Records	Rows with input issues	Demand-adjusted click gap	Pages losing clicks

The 'top tents of 2022' post lost both impressions and CTR: classic decay. The Adirondacks hikes post gained impressions but lost CTR, which points to a changed SERP rather than a content problem.

Bottom 10 by demand-adjusted click gap (biggest losses first)

#	Page URL	Demand-adjusted click gap
1	https://www.northbeam.example/blog/top-10-tents-2022/	-6,732
2	https://www.northbeam.example/blog/winter-camping-tips/	-3,776
3	https://www.northbeam.example/blog/best-hikes-adirondacks/	-2,296
4	https://www.northbeam.example/blog/how-to-waterproof-boots/	-2,244
5	https://www.northbeam.example/blog/trail-running-for-beginners/	-2,155



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

An unchanged CTR with lower impressions points toward exposure or demand. A lower CTR needs a SERP and snippet review.

Limits. Monthly keyword-volume estimates and GSC impressions measure different populations. The demand multiplier is an explicit heuristic.

Mistakes to avoid

Treating every decline as decay. If demand fell 20%, a 20% traffic drop isn't something you can fix with content.

Comparing different seasons. Compare the same months year over year.

Refreshing pages with CTR problems by rewriting the body. If impressions held and CTR fell, start with the title, snippet and SERP features.

Tips from the field

Check SERP features, AI Overviews especially, for pages whose CTR dropped.

Use the title tag CTR test after changing snippets.

Feed confirmed decayers into the content audit as Refresh.

Questions people ask

What is content decay?

The gradual decline in a page's organic traffic over time as rankings slip, competitors improve, information ages or the SERP changes.

How do I find decaying content?

Compare Search Console clicks and impressions for each page across the same months in two years, adjusted for changes in demand.

How do I fix content decay?

Update facts, add original evidence, improve coverage of current questions, strengthen internal links and retest titles. Merge if a stronger page covers the topic.

Can AI Overviews cause traffic decline?

Yes. AI Overviews and other SERP features can lower CTR even when rankings hold. This template separates that from ranking loss.

Templates that work well with this one

Content Audit Template
Score every URL by lost clicks, conversions and links, choose keep, refresh, merge or retire, and catch the risky calls.

Title Tag CTR Test Calculator
Compare two CTRs with a 95% interval and plain-English verdicts, so you don't ship a title change that was just noise.

Keyword Cannibalization Checker Template
Find queries splitting clicks across two URLs, check whether intent really overlaps and decide whether to consolidate.

SEO Visibility Score Calculator
Weight rankings by search volume and CTR to see real visibility gains and losses across a fixed keyword set.

SEO Content Calendar Template
Track owners, due dates and estimated vs completed hours, and flag overdue work automatically.

SEO Content Brief Template
A content brief built for Google and AI answers: real questions, original evidence, sources and a three-step approval workflow.

Read the full tutorial online: **optimizationtheory.com/download-view/content-decay-analysis-template/**
Get all six templates in the **Content SEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

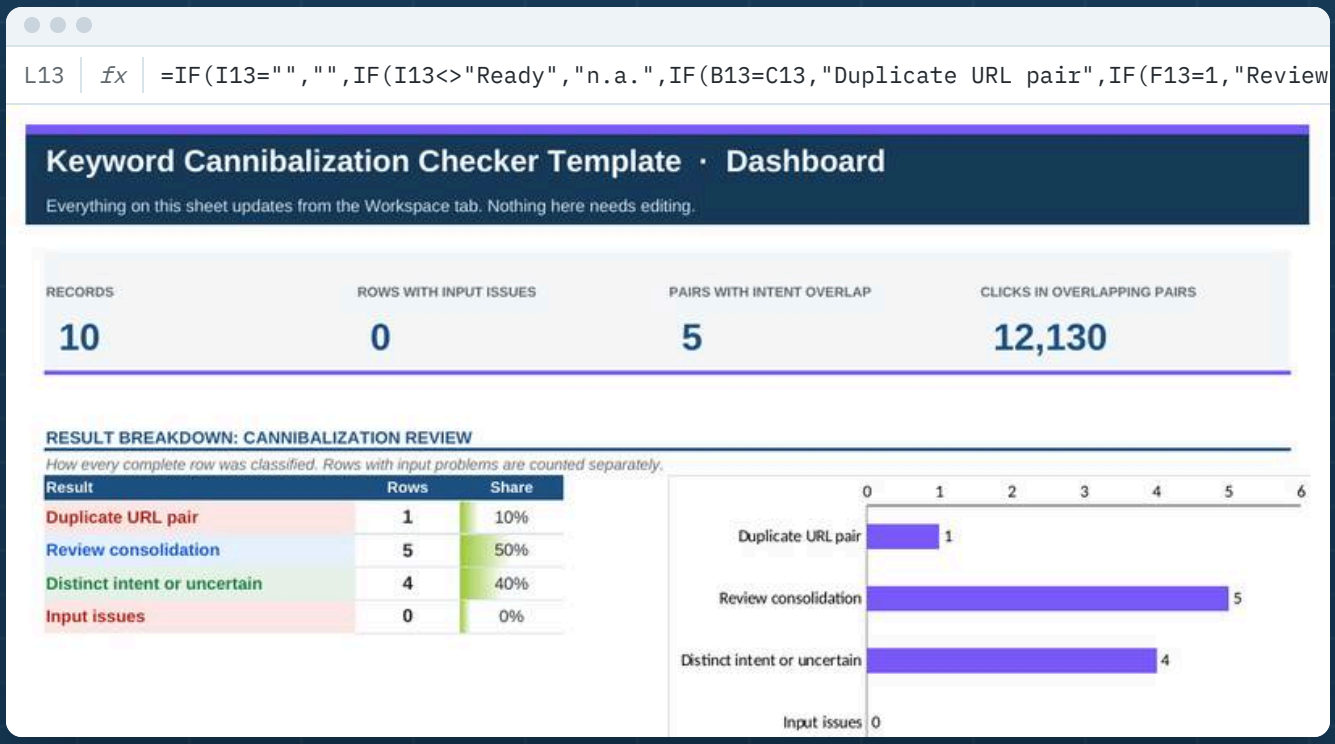
OptimizationTheory.com

Content SEO Toolkit, resource 22

Keyword Cannibalization Checker Template

Find queries splitting clicks across two URLs, check whether intent really overlaps and decide whether to consolidate.

Built for the DataForSEO API: Labs: Ranked Keywords



Jourdan Rombough, optimizationtheory.com

What this template decides

Which query and URL pairs are true cannibalization worth consolidating, which are distinct intents to leave alone, and which page should win.

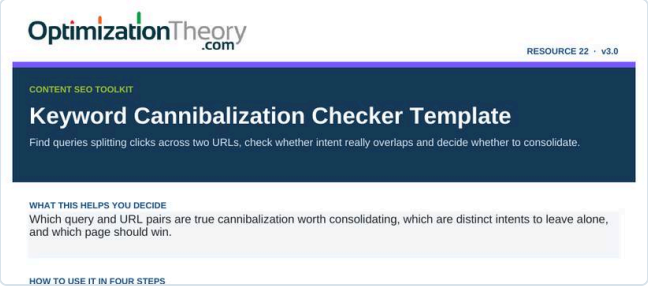
Keyword cannibalization is one of the most over-diagnosed problems in SEO. Two pages ranking for the same query isn't automatically bad; sometimes it's two different intents, sometimes it's Google testing, and sometimes you own two results on page one.

This keyword cannibalization template quantifies the split. For each query and URL pair it totals clicks, measures the smaller page's share, and asks you to confirm whether the intent truly overlaps. Only pairs with confirmed overlap are flagged Review consolidation, and you record the preferred URL so the fix is clear.

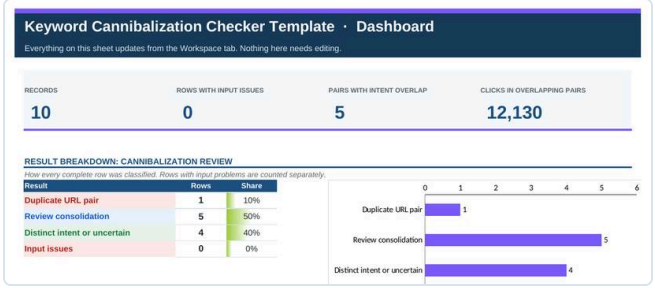
Who it's for

- SEOs investigating unstable rankings
- Content teams with overlapping blog posts
- Ecommerce sites where guides compete with categories
- Teams preparing a content audit or merge

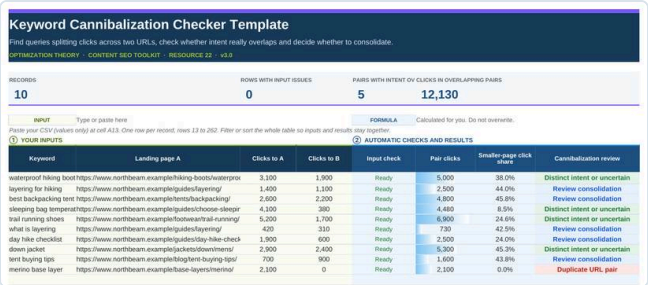
What's in the workbook



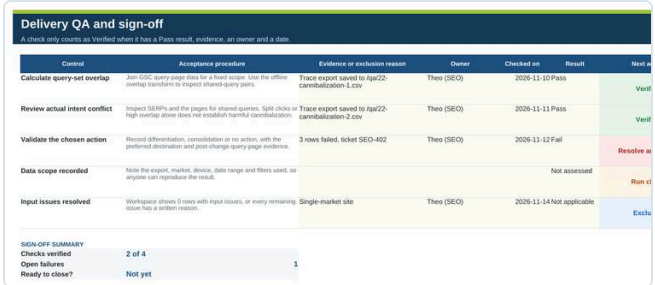
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Pair clicks = clicks A + clicks B. Smaller-page share = the smaller of the two ÷ pair clicks. Review = Duplicate URL pair if both URLs are the same, Review consolidation if intent overlap is 1, otherwise Distinct intent or uncertain.

The key formula, as written in the workbook

```
=IF(I13="","",IF(I13<>"Ready","n.a.",IF(B13=C13,"Duplicate URL pair",IF(F13=1,"Review consolidatio
n","Distinct intent or uncertain"))))
```

Result column	Plain-English formula	What it tells you
Pair clicks	Clicks to A+Clicks to B	Observed clicks to these two URLs for this query.
Smaller-page click share	IF(Pair clicks=0,"n.a.",MIN(Clicks to A,Clicks to B) ÷ Pair clicks)	Smaller share within this pair only.
Cannibalization review	IF(Landing page A=Landing page B,"Duplicate URL pair",IF(Intent overlap confirmed=1,"Review consolidation","Distinct intent or uncertain"))	Requires confirmed intent overlap before suggesting consolidation review.

The results you'll see

Duplicate URL pair | Review consolidation | Distinct intent or uncertain

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Export query × page data

From Search Console, export queries with the pages that received clicks. Keep pairs where two URLs share a query.

2

Enter clicks per URL

One row per query with both URLs and their clicks.

3

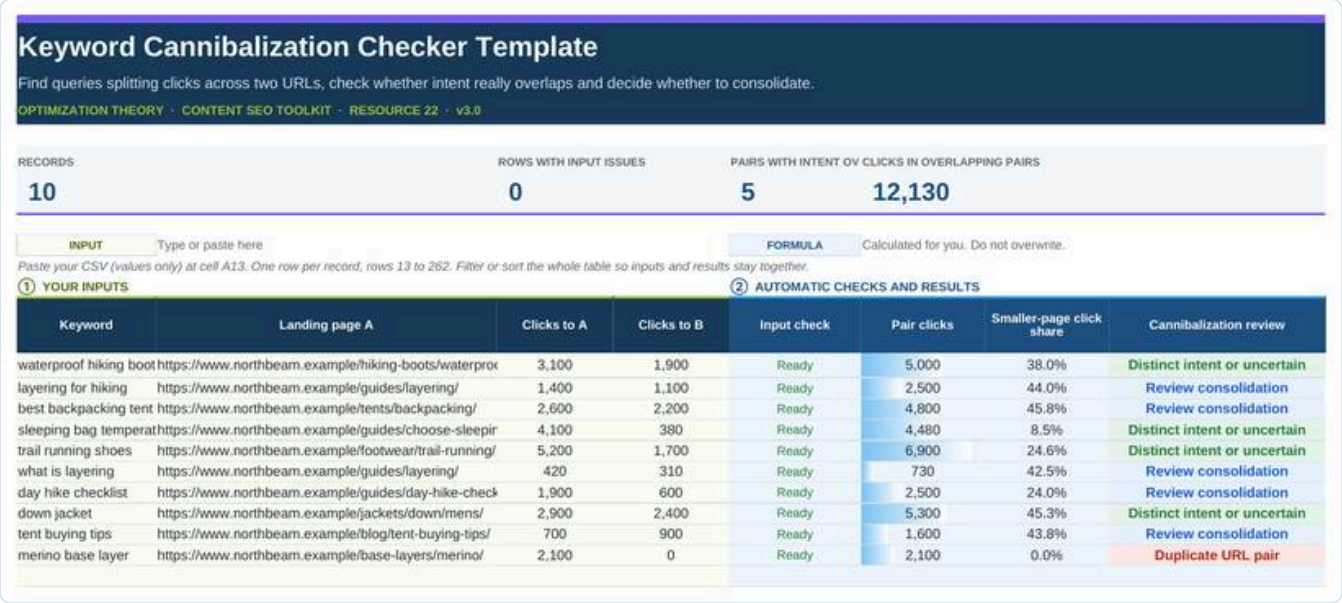
Judge intent overlap

Look at both pages and the SERP. Mark 1 only if they serve the same need.

4

Pick a winner and act

Set the preferred URL. Consolidate, re-target or add internal links pointing to the winner.



Keyword Cannibalization Checker Template

Find queries splitting clicks across two URLs, check whether intent really overlaps and decide whether to consolidate.

OPTIMIZATION THEORY · CONTENT SEO TOOLKIT · RESOURCE 22 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	PAIRS WITH INTENT OV	CLICKS IN OVERLAPPING PAIRS
10	0	5	12,130

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Keyword	Landing page A	Clicks to A	Clicks to B	Input check	Pair clicks	Smaller-page click share	Cannibalization review
waterproof hiking boot	https://www.northbeam.example/hiking-boots/waterpro	3,100	1,900	Ready	5,000	38.0%	Distinct intent or uncertain
layering for hiking	https://www.northbeam.example/guides/layering/	1,400	1,100	Ready	2,500	44.0%	Review consolidation
best backpacking tent	https://www.northbeam.example/tents/backpacking/	2,600	2,200	Ready	4,800	45.8%	Review consolidation
sleeping bag temperat	https://www.northbeam.example/guides/choose-sleepir	4,100	380	Ready	4,480	8.5%	Distinct intent or uncertain
trail running shoes	https://www.northbeam.example/footwear/trail-running/	5,200	1,700	Ready	6,900	24.6%	Distinct intent or uncertain
what is layering	https://www.northbeam.example/guides/layering/	420	310	Ready	730	42.5%	Review consolidation
day hike checklist	https://www.northbeam.example/guides/day-hike-check	1,900	600	Ready	2,500	24.0%	Review consolidation
down jacket	https://www.northbeam.example/jackets/down/mens/	2,900	2,400	Ready	5,300	45.3%	Distinct intent or uncertain
tent buying tips	https://www.northbeam.example/blog/tent-buying-tips/	700	900	Ready	1,600	43.8%	Review consolidation
merino base layer	https://www.northbeam.example/base-layers/merino/	2,100	0	Ready	2,100	0.0%	Duplicate URL pair

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Ranked Keywords**: every keyword a domain ranks for, with its ranking URL, position and volume.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/ranked_keywords/live
[
  {
    "target": "yourdomain.com",
    "location_code": 2840,
    "language_code": "en",
    "limit": 1000
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 22 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Keyword, Landing page A	Landing page B, Clicks to A, Clicks to B, Intent overlap confirmed, Preferred destination

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`keyword`	Keyword	Exact query in the selected country and language.	DataForSEO: keyword
`url_a`	Landing page A	First URL observed for this query.	DataForSEO: url
`url_b`	Landing page B	Second URL observed for the same query and window.	Your records or manual review
`clicks_a`	Clicks to A	GSC query-page clicks for URL A.	Your records or manual review
`clicks_b`	Clicks to B	GSC query-page clicks for URL B.	Your records or manual review
`intent_overlap`	Intent overlap confirmed	1 only after reviewing both pages and the actual SERP. 1 = Yes, 0 = No.	Your records or manual review
`preferred_url`	Preferred destination	Human choice after intent review. Enter UNDECIDED when unresolved.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

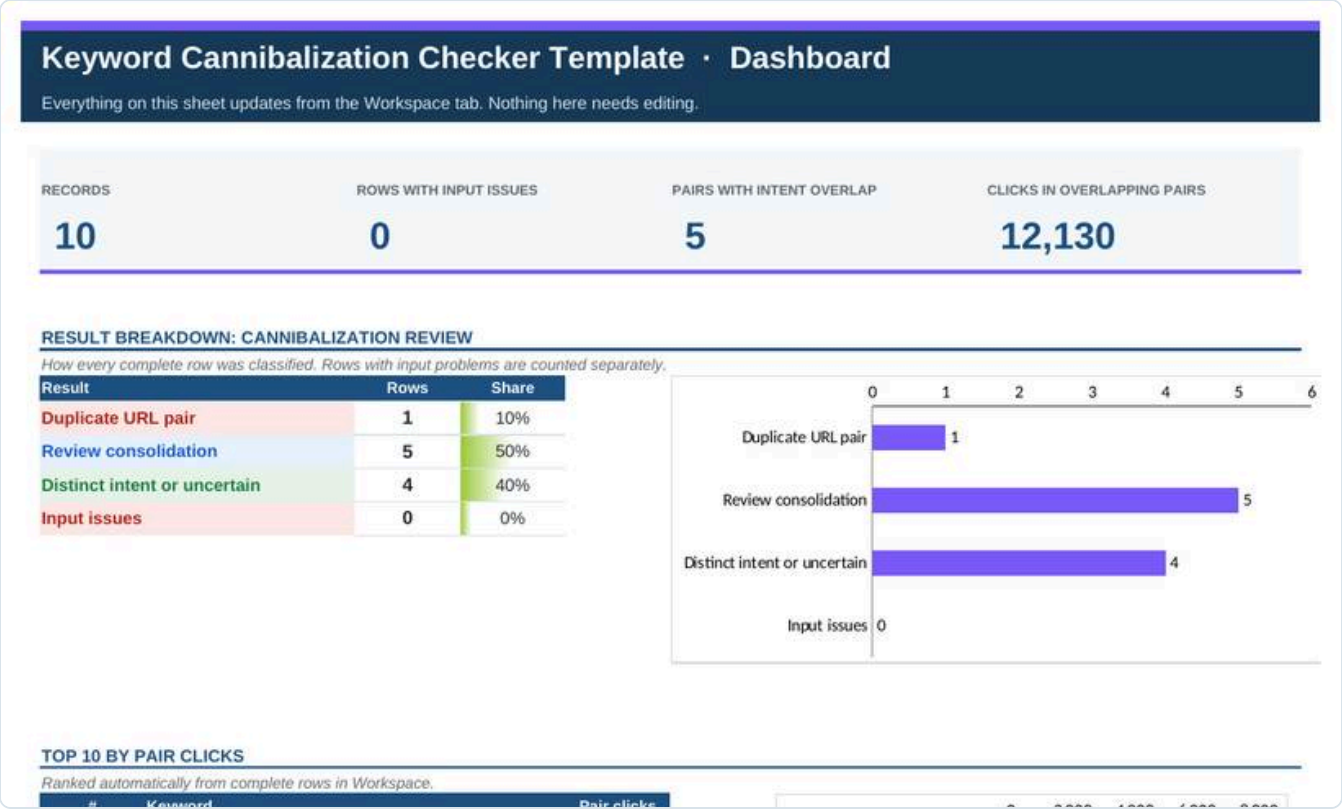
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 10 example rows.

10	0	5	12,130
Records	Rows with input issues	Pairs with intent overlap	Clicks in overlapping pairs

Five example pairs have real overlap, like three separate layering posts. The 'waterproof hiking boots' pair is a product category and a care guide: different intents, leave them alone.

Top 10 by pair clicks

#	Keyword	Pair clicks
1	trail running shoes	6,900
2	down jacket	5,300
3	waterproof hiking boots	5,000
4	best backpacking tent	4,800
5	sleeping bag temperature rating	4,480



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Two ranking URLs can be beneficial. Pair split is a diagnostic, not proof that either page harms the other.

Limits. Do not sum pair clicks across overlapping pairs or queries with privacy-limited GSC data.

Mistakes to avoid

Merging pages with different intents. A category page and a how-to guide can share a query and both deserve to exist.

Deciding on one week of data. Use 90 days or more; Google rotates URLs during tests.

Consolidating without redirects. When you merge, 301 the loser to the winner and update internal links.

Tips from the field

Run the SERP overlap template on the query to confirm intent.

Fix the keyword map so the conflict doesn't reappear.

Watch the merged page for 4 to 8 weeks before judging.

Questions people ask

What is keyword cannibalization?

When two or more pages on your site compete for the same query and intent, splitting clicks and signals so neither performs as well as one strong page would.

How do I check for keyword cannibalization?

Export Search Console query and page data, find queries where multiple URLs get clicks, and check whether those pages serve the same intent.

Is keyword cannibalization always bad?

No. If the pages serve different intents, or you hold two strong positions, it may be fine.

How do I fix keyword cannibalization?

Merge and redirect, re-target one page to a different intent, or use internal links and the keyword map to make the preferred page clear.

Templates that work well with this one

Keyword Mapping Template

Assign every keyword to exactly one URL and catch conflicting assignments before they become cannibalization.

SERP Overlap Keyword Clustering Template

Decide whether two keywords belong on one page or two by measuring how much their Google results overlap.

Content Audit Template

Score every URL by lost clicks, conversions and links, choose keep, refresh, merge or retire, and catch the risky calls.

Internal Linking Opportunity Template

Score each source-to-target internal link by expected visits and contribution per hour, then verify it went live.

Content Decay Analysis Template

Separate lost impressions, lower CTR and falling demand, so you refresh the pages that really decayed.

Redirect Mapping Template

Map every old URL to its new home and verify each redirect: one permanent hop, a 200 page, no noindex, matching canonical.

Read the full tutorial online: **optimizationtheory.com/download-view/keyword-cannibalization-template/**
Get all six templates in the **Content SEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

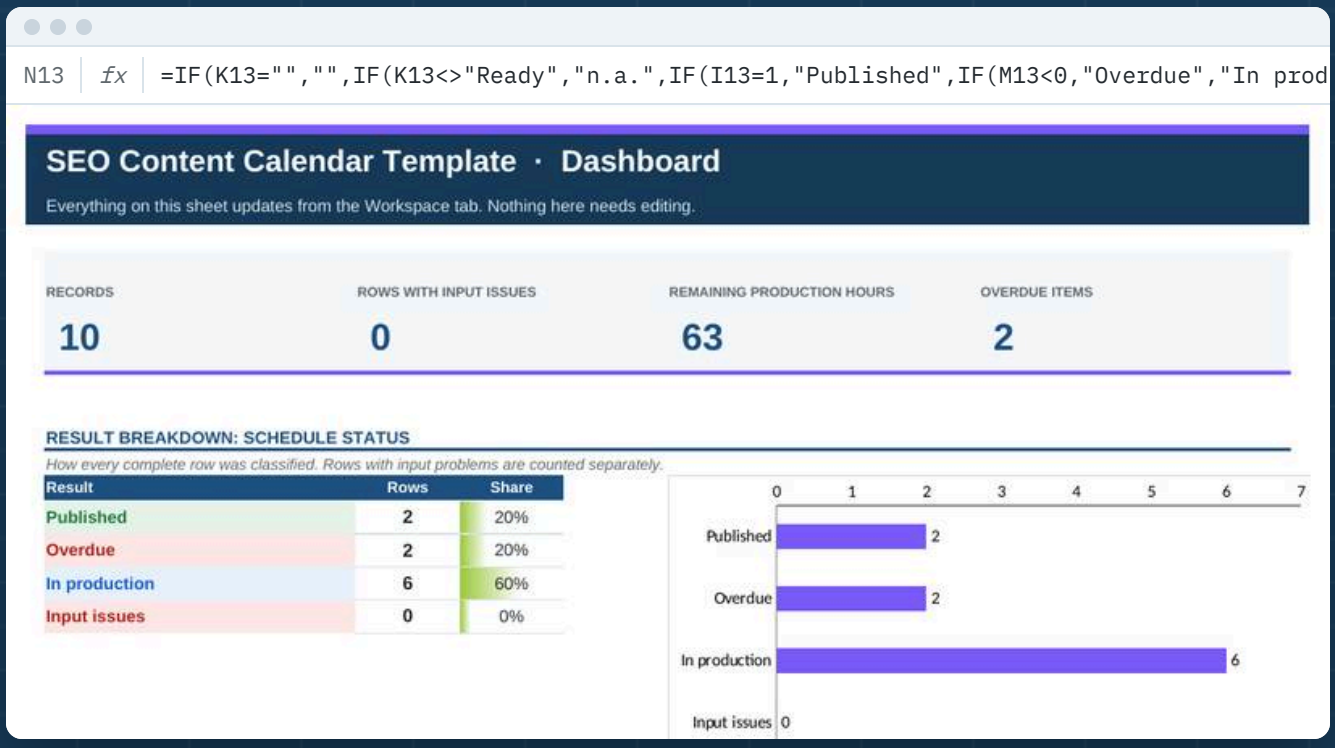
OptimizationTheory.com

Content SEO Toolkit, resource 23

SEO Content Calendar Template

Track owners, due dates and estimated vs completed hours, and flag overdue work automatically.

Built for the DataForSEO API: Labs: Keyword Overview



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

What's published, what's in production, what's overdue, and how many production hours remain against your capacity.

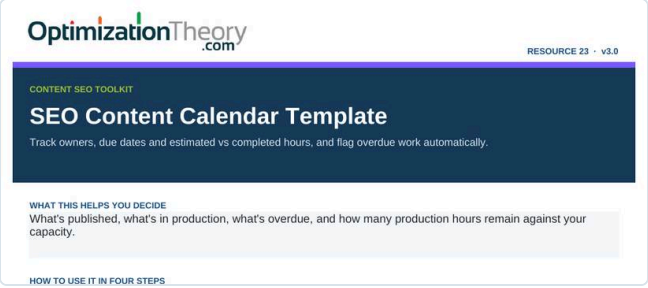
An SEO content calendar isn't a list of publish dates. It's a capacity plan: how many hours each piece takes, how many are done, and whether the work will land before the date that matters, especially for seasonal topics.

This SEO content calendar template tracks each content item with its keyword, deliverable, owner, due date, an as-of date, estimated and completed hours, and published status. It calculates remaining hours and days to due date, and labels each item Published, In production or Overdue.

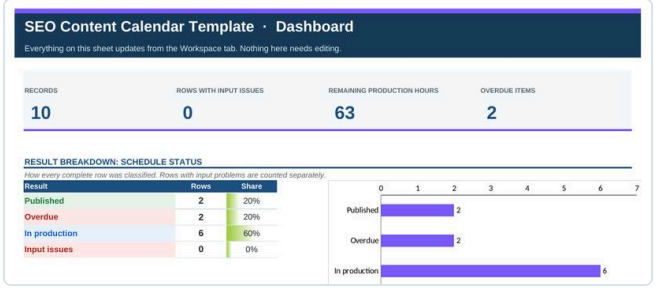
Who it's for

- Content managers running a production pipeline
- SEOs coordinating writers, designers and developers
- Agencies reporting delivery to clients
- Small teams balancing new content with refreshes

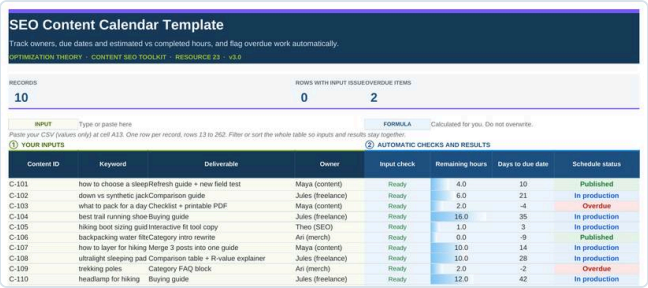
What's in the workbook



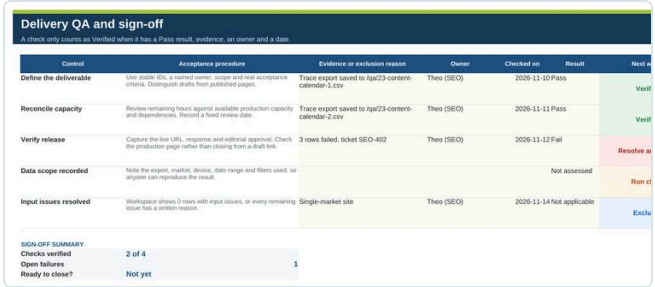
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Remaining hours = estimated – completed (never negative). Days to due = due date – as-of date. Status = Published if published, Overdue if days to due is negative, otherwise In production.

The key formula, as written in the workbook

```
=IF(K13="","",IF(K13<>"Ready","n.a.",IF(I13=1,"Published",IF(M13<0,"Overdue","In production"))))
```

Result column	Plain-English formula	What it tells you
Remaining hours	MAX(0,Estimated hours-Completed hours)	Uncompleted planned hours.
Days to due date	Due date-Review date	Calendar days from fixed review date to due date.
Schedule status	IF(Published verified=1,"Published",IF(Days to due date<0,"Overdue","In production"))	A publication flag requires actual release verification.

The results you'll see

Published Overdue In production

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Load the backlog

Add each item with a content ID, keyword, deliverable and owner.

2

Set due dates from demand

Use the seasonality planner's Start month and the roadmap to set realistic due dates.

3

Update hours weekly

Enter completed hours and update the as-of date. Remaining hours roll up on the Dashboard.

4

Review overdue first

Overdue items appear in the action list. Reassign, rescope or re-date them.



SEO Content Calendar Template

Track owners, due dates and estimated vs completed hours, and flag overdue work automatically.

OPTIMIZATION THEORY · CONTENT SEO TOOLKIT · RESOURCE 23 · v3.0

RECORDS	ROWS WITH INPUT ISSUE	OVERDUE ITEMS
10	0	2

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Content ID	Keyword	Deliverable	Owner	Input check	Remaining hours	Days to due date	Schedule status
C-101	how to choose a sleep	Refresh guide + new field test	Maya (content)	Ready	4.0	10	Published
C-102	down vs synthetic jack	Comparison guide	Jules (freelance)	Ready	6.0	21	In production
C-103	what to pack for a day	Checklist + printable PDF	Maya (content)	Ready	2.0	-4	Overdue
C-104	best trail running shoe	Buying guide	Jules (freelance)	Ready	16.0	35	In production
C-105	hiking boot sizing guid	Interactive fit tool copy	Theo (SEO)	Ready	1.0	3	In production
C-106	backpacking water filte	Category intro rewrite	Ari (merch)	Ready	0.0	-9	Published
C-107	how to layer for hiking	Merge 3 posts into one guide	Maya (content)	Ready	10.0	14	In production
C-108	ultralight sleeping pad	Comparison table + R-value explainer	Jules (freelance)	Ready	10.0	28	In production
C-109	trekking poles	Category FAQ block	Ari (merch)	Ready	2.0	-2	Overdue
C-110	headlamp for hiking	Buying guide	Jules (freelance)	Ready	12.0	42	In production

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Keyword Overview**: search volume, monthly history, difficulty and intent for a list of keywords.

DataForSEO supplies the URL or query list and the audit trail; you add the measurements listed below.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/keyword_overview/live
[
  {
    "keywords": [
      "your keyword 1",
      "your keyword 2"
    ],
    "location_code": 2840,
    "language_code": "en"
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 23 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Keyword	Content ID, Deliverable, Owner, Due date, Review date, Estimated hours, Completed hours, Published verified

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`content_id`	Content ID	Stable identifier for the planned deliverable.	Your records or manual review
`keyword`	Keyword	Exact query in the selected country and language.	DataForSEO: keyword
`deliverable`	Deliverable	Specific new page, refresh, comparison or original research task.	Your records or manual review
`owner`	Owner	Person accountable for the next action.	Your records or manual review
`due_date`	Due date	Agreed publication or handoff date.	Your records or manual review
`as_of`	Review date	Fixed planning date for this review.	Your records or manual review
`estimated_hours`	Estimated hours	Total expected production hours.	Your records or manual review
`completed_hours`	Completed hours	Hours of the planned work already completed.	Your records or manual review
`published`	Published verified	1 after the live URL and final QA are checked. 1 = Yes, 0 = No.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

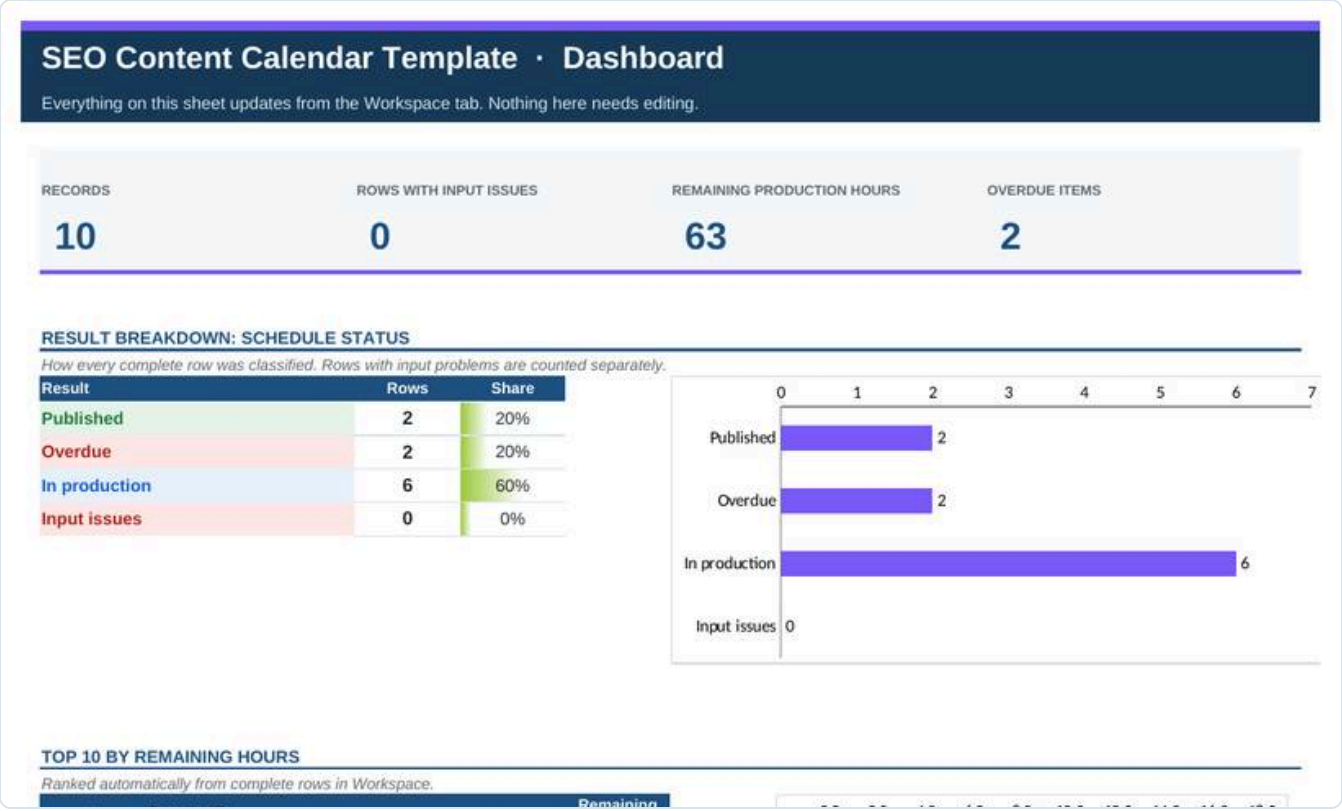
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 10 example rows.

10	0	63	2
Records	Rows with input issues	Remaining production hours	Overdue items

Two example items are overdue, including a day-hike checklist that's tied to a seasonal window. The Dashboard shows 63 production hours still outstanding.

Top 10 by remaining hours

#	Content ID	Remaining hours
1	C-104	16.0
2	C-110	12.0
3	C-108	10.0
4	C-107	10.0
5	C-102	6.0



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

A completed effort estimate does not mean the content was published. The publication flag is a separate verification.

Limits. Keyword demand informs selection. DataForSEO cannot supply owner, production capacity or publication approval.

Mistakes to avoid

Planning by publish date only. Without hours, you can't see whether the plan fits the team's capacity.

Not updating the as-of date. Overdue status depends on it. Update it each time you review the calendar.

Mixing refreshes and new pieces without labels. Use the deliverable field so refresh work isn't invisible.

Tips from the field

Pull refresh items from the content audit and decay templates.

Group by owner to spot overloaded people.

Keep a separate copy per quarter for clean reporting.

Questions people ask

What is an SEO content calendar?

A schedule of content to create or update, tied to target keywords, owners and deadlines, and ideally to production capacity.

How far ahead should I plan content?

At least a quarter, and further for seasonal topics that need publishing two to four months before peak demand.

Can I use this in Google Sheets?

Yes. Upload the XLSX to Google Drive and open it in Google Sheets.

How do I track content capacity?

Estimate hours per item, record completed hours, and compare total remaining hours with the team's available hours.

Templates that work well with this one

Search Seasonality Planner

Turn monthly search volume into a seasonal index, season-adjusted click targets and a publish-by month.

SEO Content Brief Template

A content brief built for Google and AI answers: real questions, original evidence, sources and a three-step approval workflow.

Content Audit Template

Score every URL by lost clicks, conversions and links, choose keep, refresh, merge or retire, and catch the risky calls.

SEO Roadmap Template

Sequence 90 days of SEO and GEO work by weighted opportunity per hour, dependencies and acceptance criteria.

Content Decay Analysis Template

Separate lost impressions, lower CTR and falling demand, so you refresh the pages that really decayed.

Keyword Prioritization Template

Rank every keyword by the profit it could add per hour of work, not by search volume alone.

Read the full tutorial online: **optimizationtheory.com/download-view/seo-content-calendar-template/**
Get all six templates in the **Content SEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

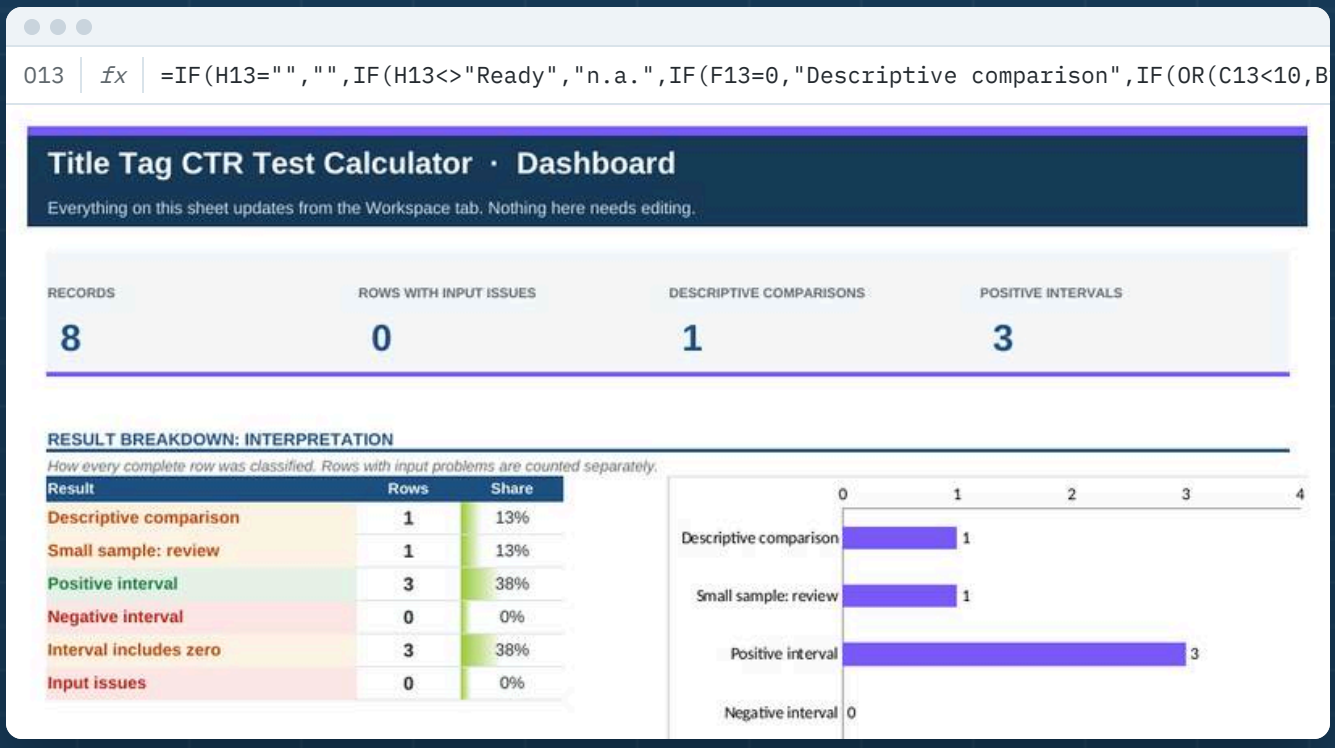
OptimizationTheory.com

Content SEO Toolkit, resource 24

Title Tag CTR Test Calculator

Compare two CTRs with a 95% interval and plain-English verdicts, so you don't ship a title change that was just noise.

Built for the DataForSEO API: On-Page API



Jourdan Rombough, optimizationtheory.com

What this template decides

Whether a title or snippet change produced a CTR difference that's distinguishable from noise, with honest labels for small samples and non-randomized comparisons.

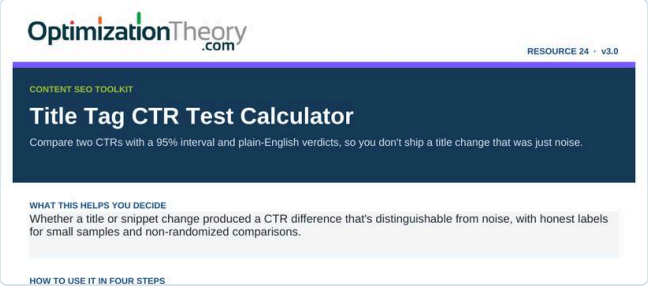
Title tag tests are one of the few SEO experiments small teams can run, and one of the easiest to misread. A CTR going from 3.1% to 3.4% looks like a win until you realize the interval around that difference includes zero.

This SEO title tag testing calculator compares CTR for version A and version B, calculates the difference in percentage points, an unpooled standard error and an approximate 95% confidence interval, then labels each test: Positive interval, Negative interval, Interval includes zero, Small sample: review, or Descriptive comparison when the test wasn't randomized.

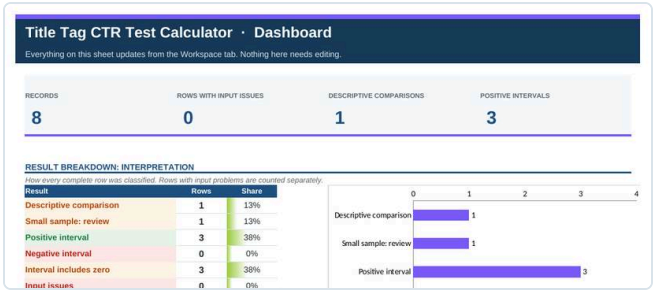
Who it's for

- SEOs testing titles and meta descriptions
- Ecommerce teams testing product title formats at scale
- Analysts who need to report test results honestly
- Teams with SEO split-testing setups

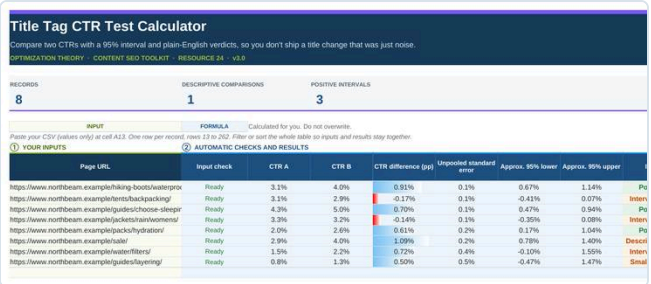
What's in the workbook



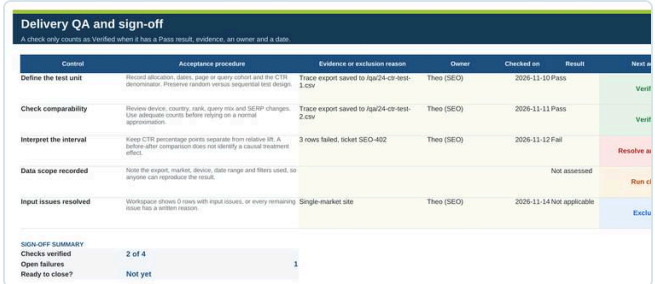
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

CTR = clicks ÷ impressions for each version. Difference = CTR B − CTR A. Standard error = √(pA(1−pA)/nA + pB(1−pB)/nB). The approximate 95% interval is difference ± 1.96 × SE. Fewer than 10 clicks or non-clicks in either group is flagged as a small sample.

The key formula, as written in the workbook

```
=IF(H13="","",IF(H13<>"Ready","n.a.",IF(F13=0,"Descriptive comparison",IF(OR(C13<10,B13-C13<10,E13<10,D13-E13<10),"Small sample: review",IF(AND(M13>0,N13>0),"Positive interval",IF(AND(M13<0,N13<0),"Negative interval","Interval includes zero"))))))
```

Result column	Plain-English formula	What it tells you
CTR A	Version A clicks ÷ Version A impressions	Version A clicks / impressions.
CTR B	Version B clicks ÷ Version B impressions	Version B clicks / impressions.
CTR difference (pp)	CTR B-CTR A	Percentage-point difference displayed as a percentage.
Unpooled standard error	SQRT(CTR A × (1-CTR A) ÷ Version A impressions+CTR B × (1-CTR B) ÷ Version B impressions)	Normal-approximation standard error of the difference.
Approx. 95% lower	CTR difference (pp)-1.96 × Unpooled standard error	Unpooled Wald interval lower bound.
Approx. 95% upper	CTR difference (pp)+1.96 × Unpooled standard error	Unpooled Wald interval upper bound.
Interpretation	IF(Random allocation verified=0,"Descriptive comparison",IF(OR(Version A clicks<10,Version A impressions-Version A clicks<10,Version B clicks<10,Version B impressions-Version B clicks<10),"Small sample: review",IF(AND(Approx. 95% lower>0,Approx. 95% upper>0),"Positive interval",IF(AND(Approx. 95% lower<0,Approx. 95% upper<0),"Negative interval","Interval includes zero"))))	Checks allocation and small expected-count concerns before labeling the interval.

The results you'll see

Descriptive comparison | Small sample: review | Positive interval | Negative interval | Interval includes zero

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of

the results until fixed.

How to use it, step by step

1

Define A and B

Split comparable pages into two groups, or compare time periods for one page if you can't split.

2

Collect impressions and clicks

From Search Console, for the same date range and filters for each version.

3

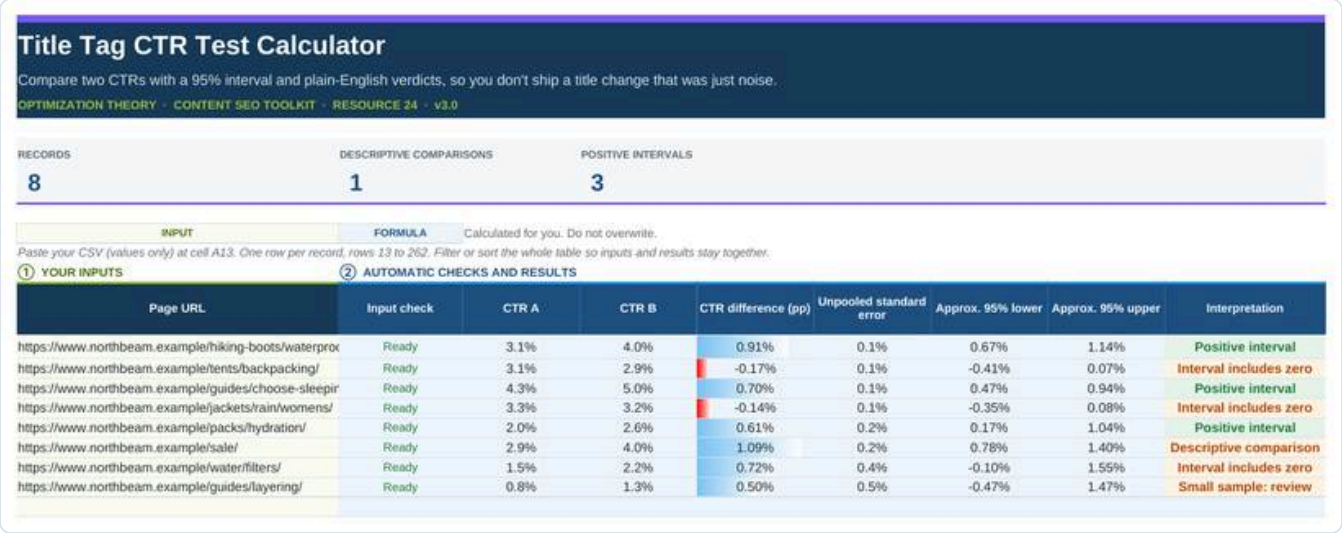
Mark randomization

Mark 1 only if pages were randomly assigned to A and B. Before/after on one page is 0.

4

Read the interval, not the point

Ship only Positive interval results. Keep testing when the interval includes zero.



Title Tag CTR Test Calculator

Compare two CTRs with a 95% interval and plain-English verdicts, so you don't ship a title change that was just noise.

OPTIMIZATION THEORY · CONTENT SEO TOOLKIT · RESOURCE 24 · v3.0

RECORDS	DESCRIPTIVE COMPARISONS	POSITIVE INTERVALS
8	1	3

INPUT FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS ② AUTOMATIC CHECKS AND RESULTS

Page URL	Input check	CTR A	CTR B	CTR difference (pp)	Unpooled standard error	Approx. 95% lower	Approx. 95% upper	Interpretation
https://www.northbeam.example/hiking-boots/waterproc	Ready	3.1%	4.0%	0.91%	0.1%	0.67%	1.14%	Positive interval
https://www.northbeam.example/tents/backpacking/	Ready	3.1%	2.9%	-0.17%	0.1%	-0.41%	0.07%	Interval includes zero
https://www.northbeam.example/guides/choose-sleepir	Ready	4.3%	5.0%	0.70%	0.1%	0.47%	0.94%	Positive interval
https://www.northbeam.example/jackets/rain/womens/	Ready	3.3%	3.2%	-0.14%	0.1%	-0.35%	0.08%	Interval includes zero
https://www.northbeam.example/packs/hydration/	Ready	2.0%	2.6%	0.61%	0.2%	0.17%	1.04%	Positive interval
https://www.northbeam.example/sale/	Ready	2.9%	4.0%	1.09%	0.2%	0.78%	1.40%	Descriptive comparison
https://www.northbeam.example/water/filters/	Ready	1.5%	2.2%	0.72%	0.4%	-0.10%	1.55%	Interval includes zero
https://www.northbeam.example/guides/layering/	Ready	0.8%	1.3%	0.50%	0.5%	-0.47%	1.47%	Small sample: review

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 24 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Page URL	Version A impressions, Version A clicks, Version B impressions, Version B clicks, Random allocation verified

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`url`	Page URL	Exact absolute URL. Keep case and query parameters unless a documented normalization rule applies.	DataForSEO: url
`impressions_a`	Version A impressions	Eligible observations for version A under a documented allocation.	Your records or manual review
`clicks_a`	Version A clicks	Clicks among version A impressions.	Your records or manual review
`impressions_b`	Version B impressions	Eligible observations for version B.	Your records or manual review
`clicks_b`	Version B clicks	Clicks among version B impressions.	Your records or manual review
`randomized`	Random allocation verified	1 only if allocation supports the independent randomized-comparison assumptions. 1 = Yes, 0 = No.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

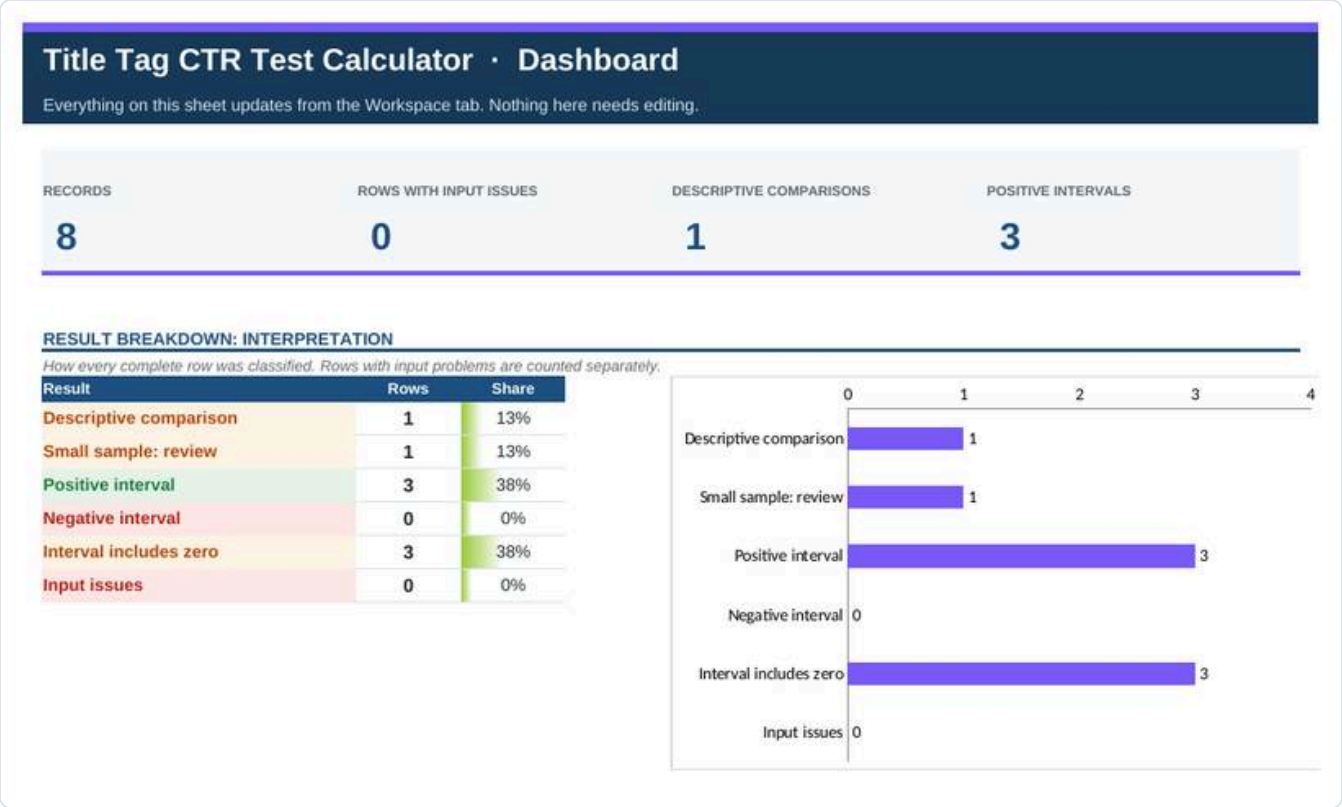
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 8 example rows.

8	0	1	3
Records	Rows with input issues	Descriptive comparisons	Positive intervals

Three example tests show a clearly positive interval. The tent category test went slightly negative but includes zero, and the sale page test wasn't randomized, so it's descriptive only.

Top 10 by CTR difference (pp)

#	Page URL	CTR difference (pp)
1	https://www.northbeam.example/sale/	1.09%
2	https://www.northbeam.example/hiking-boots/waterproof/	0.91%
3	https://www.northbeam.example/water/filters/	0.72%
4	https://www.northbeam.example/guides/choose-sleeping-bag/	0.70%
5	https://www.northbeam.example/packs/hydration/	0.61%



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Ordinary before-after GSC windows are descriptive. The randomized flag must not be used to upgrade observational data.

Limits. Normal approximation can fail for small counts. Repeated peeking, correlated impressions and multiple tests need a different analysis.

Mistakes to avoid

Declaring winners on tiny samples. With a few hundred impressions, almost any difference is noise.

Before/after tests treated as experiments. Rankings, seasonality and SERP features all change over time. Label them descriptive.

Ignoring position changes. CTR depends on rank. Check average position stayed similar between versions.

Tips from the field

Use the SEO split test calculator for traffic-level tests with control groups.

Test patterns across many pages rather than one page at a time.

Save the winning pattern in your content brief template for future pages.

Questions people ask

How do I A/B test title tags for SEO?

Change titles on a randomly selected group of similar pages, keep a control group unchanged, and compare CTR over the same period with a confidence interval.

How long should an SEO title test run?

Until each group has enough impressions and clicks to produce a tight interval, typically several weeks for most sites.

Why isn't a higher CTR always a win?

Because random variation produces differences too. The confidence interval shows whether the difference is likely real.

Can I test one page before and after?

Yes, but it's a descriptive comparison, not a controlled test. The template labels it that way.

Templates that work well with this one

SEO Split Test Calculator
Estimate ratio-adjusted lift and difference-in-differences against matched control pages, with a pre-trend check.

Content Decay Analysis Template
Separate lost impressions, lower CTR and falling demand, so you refresh the pages that really decayed.

SEO Content Brief Template
A content brief built for Google and AI answers: real questions, original evidence, sources and a three-step approval workflow.

Keyword Cannibalization Checker Template
Find queries splitting clicks across two URLs, check whether intent really overlaps and decide whether to consolidate.

SEO Visibility Score Calculator
Weight rankings by search volume and CTR to see real visibility gains and losses across a fixed keyword set.

SEO Forecast Template
Project added clicks and contribution per keyword cluster with CTR, attainment and seasonality you can defend.

Read the full tutorial online: **optimizationtheory.com/download-view/seo-ctr-test-calculator/**
Get all six templates in the **Content SEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

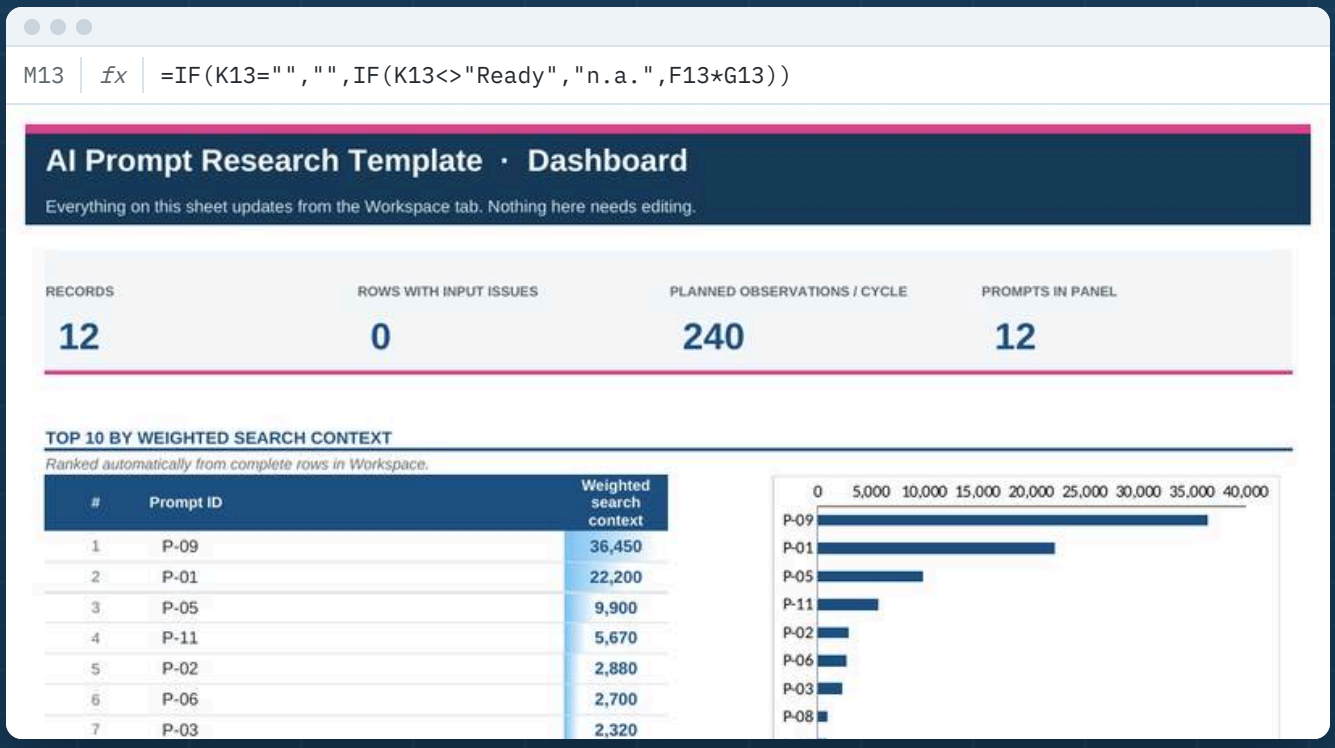
OptimizationTheory.com

AI Visibility & GEO Toolkit, resource 25

AI Prompt Research Template

Turn real customer tasks and keywords into a weighted prompt panel for ChatGPT, Perplexity, Gemini and AI Overviews.

Built for the DataForSEO API: Labs: Keyword Overview



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which prompts belong in your AI visibility panel, how much each matters, and how many observations each tracking cycle needs.

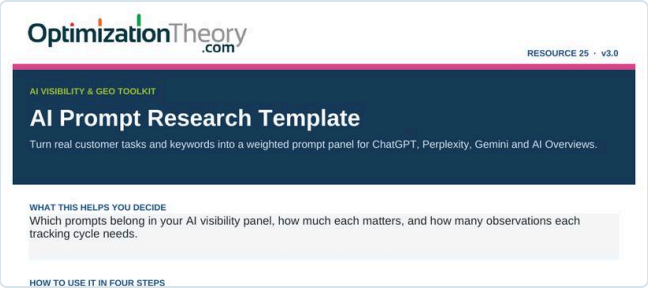
AI visibility tracking is only as good as the prompts you track. Most teams start with a dozen brand-flattering prompts written in a meeting, which tells you almost nothing about how real customers find, compare and choose. Prompt research deserves the same rigor as keyword research.

This AI prompt research template builds a repeatable prompt panel. Each prompt is tied to a persona, a task, a related keyword and its search volume, plus a business relevance weight. It calculates a weighted search context so you can prioritize prompts, and the observations needed per cycle from repeat runs and platform count.

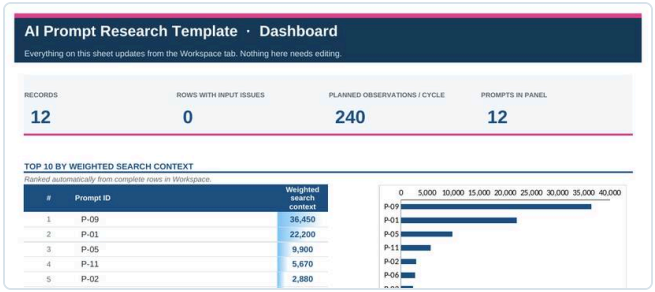
Who it's for

- SEOs starting a GEO or AI visibility program
- Brand and product marketers who want to know how AI describes them
- Agencies setting up AI tracking for clients
- Teams choosing prompts for an AI visibility tool

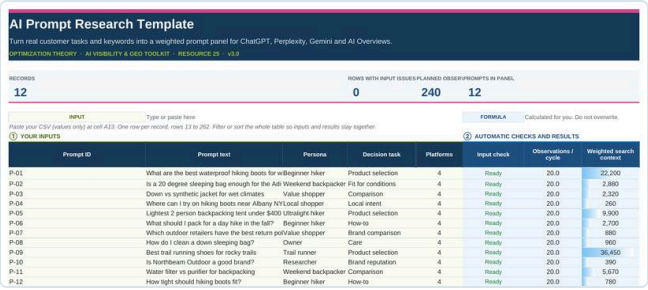
What's in the workbook



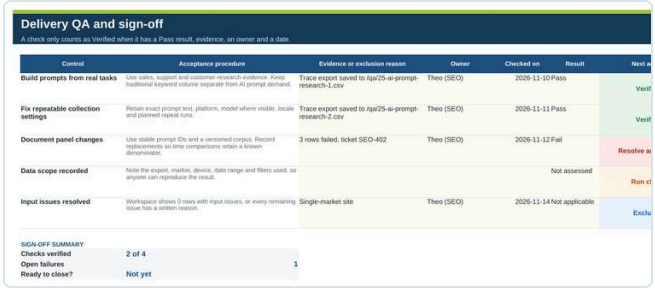
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Observations per cycle = repeat runs × platform count. Weighted search context = related keyword volume × business relevance. Volume is context, not a measure of prompt volume, which no platform publishes.

The key formula, as written in the workbook

```
=IF(K13="","",IF(K13<>"Ready","n.a.",F13*G13))
```

Result column	Plain-English formula	What it tells you
Observations / cycle	Runs per cycle × Platforms	Number of scheduled platform-run observations for this prompt.
Weighted search context	Monthly searches × Business relevance factor	Traditional-search context weighted by analyst relevance. Not AI prompt volume.

How to use it, step by step

1

Collect real tasks

Mine sales calls, support tickets, onsite search, People Also Ask and community threads for the jobs customers are trying to get done.

2

Write natural prompts

Phrase each prompt the way a person would type or say it, with context. One prompt per row.

3

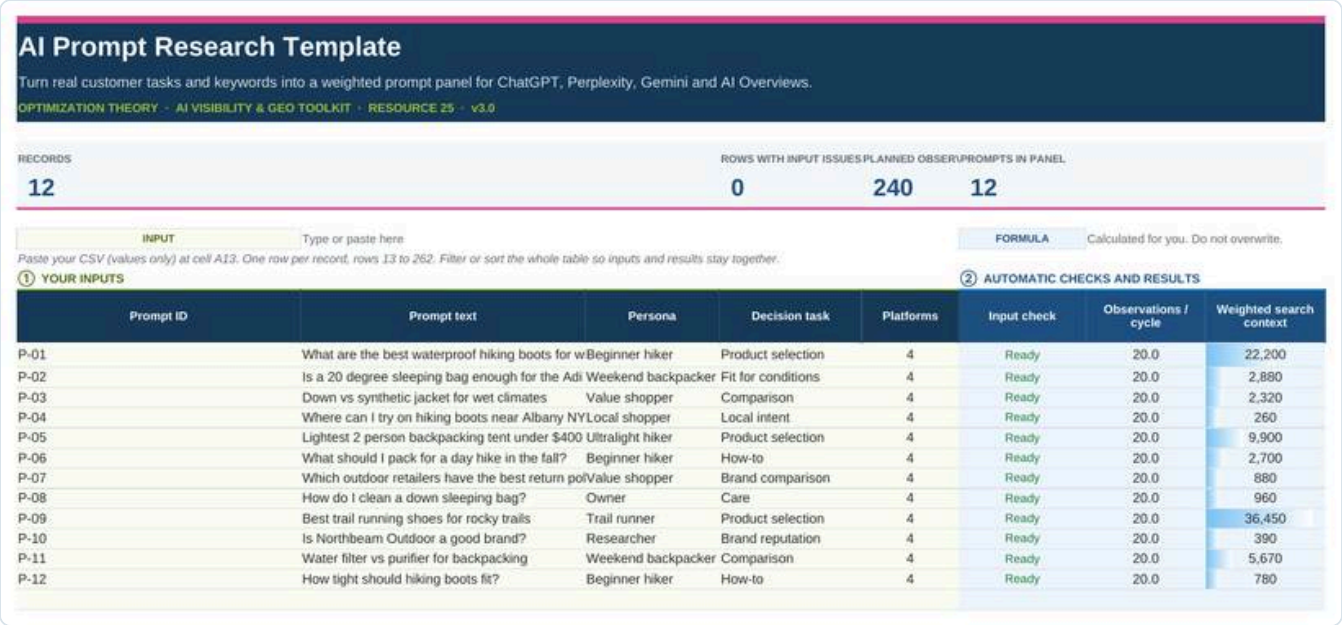
Weight by relevance and demand

Link a related keyword and its volume, then set business relevance (0 to 1).

4

Plan the cycle

Set repeat runs (answers vary run to run) and platforms. The Dashboard totals observations per cycle.



AI Prompt Research Template

Turn real customer tasks and keywords into a weighted prompt panel for ChatGPT, Perplexity, Gemini and AI Overviews.

OPTIMIZATION THEORY · AI VISIBILITY & GEO TOOLKIT · RESOURCE 25 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	PLANNED OBSER\PROMPTS IN PANEL	
12	0	240	12

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Prompt ID	Prompt text	Persona	Decision task	Platforms	Input check	Observations / cycle	Weighted search context
P-01	What are the best waterproof hiking boots for w	Beginner hiker	Product selection	4	Ready	20.0	22,200
P-02	Is a 20 degree sleeping bag enough for the Adi	Weekend backpacker	Fit for conditions	4	Ready	20.0	2,880
P-03	Down vs synthetic jacket for wet climates	Value shopper	Comparison	4	Ready	20.0	2,320
P-04	Where can I try on hiking boots near Albany NY	Local shopper	Local intent	4	Ready	20.0	260
P-05	Lightest 2 person backpacking tent under $400	Ultralight hiker	Product selection	4	Ready	20.0	9,900
P-06	What should I pack for a day hike in the fall?	Beginner hiker	How-to	4	Ready	20.0	2,700
P-07	Which outdoor retailers have the best return pol	Value shopper	Brand comparison	4	Ready	20.0	880
P-08	How do I clean a down sleeping bag?	Owner	Care	4	Ready	20.0	960
P-09	Best trail running shoes for rocky trails	Trail runner	Product selection	4	Ready	20.0	36,450
P-10	Is Northbeam Outdoor a good brand?	Researcher	Brand reputation	4	Ready	20.0	390
P-11	Water filter vs purifier for backpacking	Weekend backpacker	Comparison	4	Ready	20.0	5,670
P-12	How tight should hiking boots fit?	Beginner hiker	How-to	4	Ready	20.0	780

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Keyword Overview**: search volume, monthly history, difficulty and intent for a list of keywords.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/keyword_overview/live
[
  {
    "keywords": [
      "your keyword 1",
      "your keyword 2"
    ],
    "location_code": 2840,
    "language_code": "en"
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 25 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Keyword, Monthly searches	Prompt ID, Prompt text, Persona, Decision task, Business relevance factor, Runs per cycle, Platforms

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`prompt_id`	Prompt ID	Stable panel identifier.	Your records or manual review
`prompt`	Prompt text	Exact natural-language request to test.	Your records or manual review
`persona`	Persona	Specific buyer or user context.	Your records or manual review
`task`	Decision task	Decision the user is trying to complete.	Your records or manual review
`keyword`	Keyword	Exact query in the selected country and language.	DataForSEO: keyword
`search_volume`	Monthly searches	Provider monthly search-volume estimate. Use one market, language and source date.	DataForSEO: search_volume
`business_relevance`	Business relevance factor	Analyst planning factor 0 to 1 for the task, not measured AI demand. Decimal, 0.08 = 8%.	Your records or manual review
`repeat_runs`	Runs per cycle	Repeated observations planned for each platform and locale.	Your records or manual review
`platform_count`	Platforms	Number of platforms in the panel.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

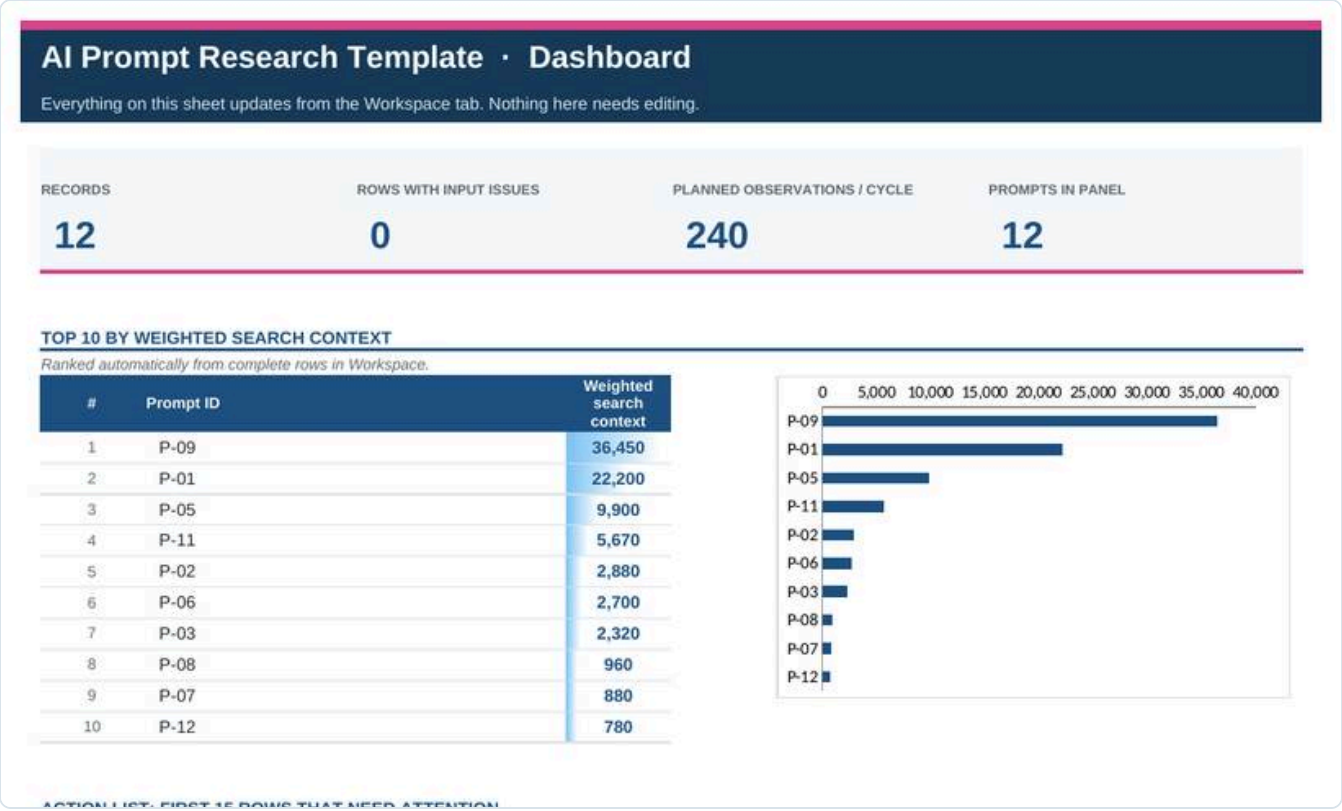
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 12 example rows.

12	0	240	12
Records	Rows with input issues	Planned observations / cycle	Prompts in panel

Twelve prompts across four platforms with five runs each means 240 observations per cycle. That's manageable manually once a month, and the minimum needed to see real movement.

Top 10 by weighted search context

#	Prompt ID	Weighted search context
1	P-09	36,450
2	P-01	22,200
3	P-05	9,900
4	P-11	5,670
5	P-02	2,880



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

A balanced panel includes brand, comparison, problem, task and decision prompts. Keep the panel definition stable.

Limits. Traditional keyword volume is not a proxy measurement of prompt frequency. Panel selection affects reported visibility.

Mistakes to avoid

Tracking only branded prompts. AI visibility matters most in unbranded, comparison and recommendation prompts where buyers choose.

Running each prompt once. AI answers vary between runs. Repeat runs make citation rates meaningful.

Treating keyword volume as prompt volume. Prompt volume isn't published. Use keyword volume as a relative weight only.

Tips from the field

Feed the panel straight into the AI citation tracker.

Keep the panel stable for at least three cycles before changing it.

Add a few competitor-comparison prompts; they're often where you're missing.

Questions people ask

How do I choose prompts to track in ChatGPT?

Start from real customer tasks and questions, write them as natural prompts, and weight them by business relevance and related search demand.

How many prompts should I track?

Small sites can start with 10 to 30. Larger brands often track hundreds. Consistency over time matters more than size.

Is there search volume for AI prompts?

Not publicly. Use related keyword volume as a proxy for interest, and label it as context.

How often should I run my prompt panel?

Monthly is common. Run each prompt several times per platform each cycle because answers vary.

Templates that work well with this one

AI Citation Tracker

Log answers from ChatGPT, Perplexity, Gemini and AI Overviews, and measure your citation rate by platform.

AI Share of Voice Calculator

Compare citation rate and share across competitor domains inside one fixed set of AI answers.

SEO Content Brief Template

A content brief built for Google and AI answers: real questions, original evidence, sources and a three-step approval workflow.

Answer Evidence Audit Template

Check every claim for a supporting source, original value, clarity and freshness, so AI answers can quote and cite it.

Keyword Prioritization Template

Rank every keyword by the profit it could add per hour of work, not by search volume alone.

AI Referral Traffic Tracker

Measure sessions, conversion rate and contribution per session from ChatGPT, Perplexity, Gemini, Copilot and Claude.

Read the full tutorial online: **optimizationtheory.com/download-view/ai-prompt-research-template/**
Get all six templates in the **AI Visibility & GEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

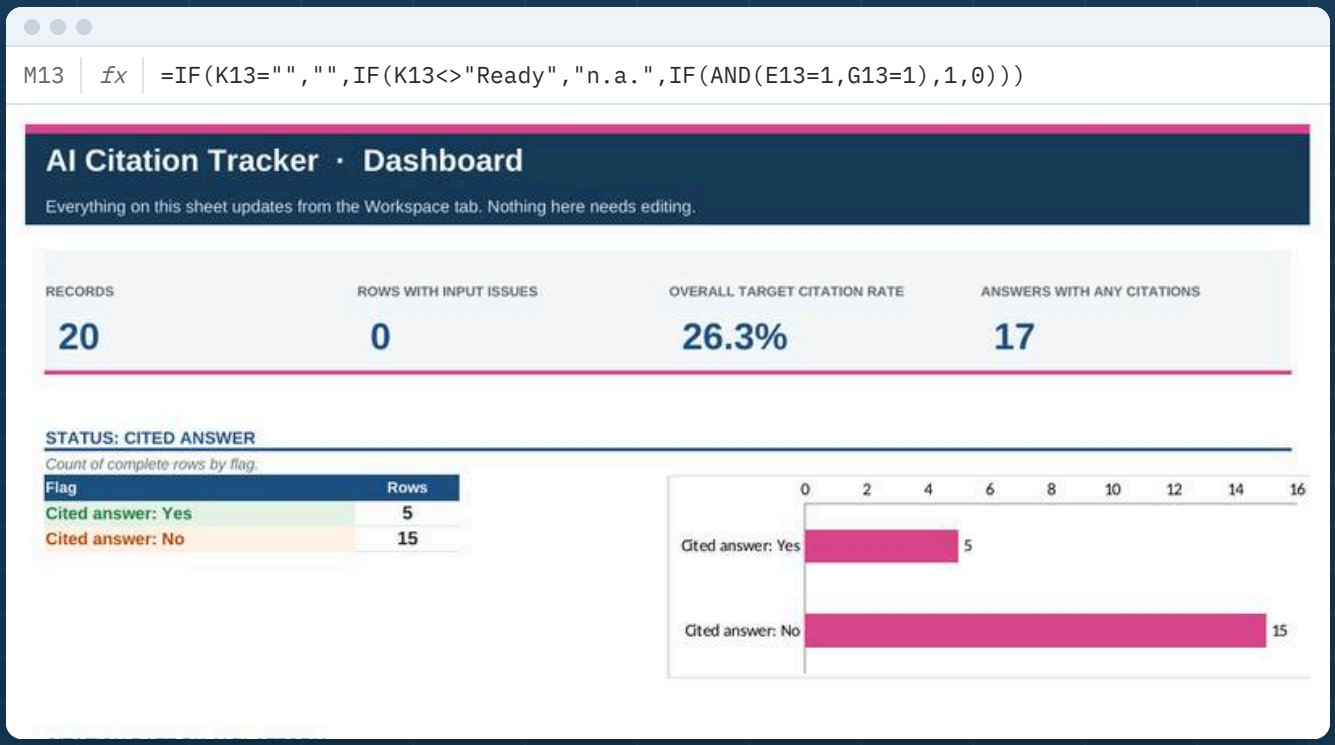
OptimizationTheory.com

AI Visibility & GEO Toolkit, resource 26

AI Citation Tracker

Log answers from ChatGPT, Perplexity, Gemini and AI Overviews, and measure your citation rate by platform.

Built for the DataForSEO API: AI Optimization: LLM Mentions



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

How often AI answers cite your site, on which platforms and prompts, measured over an explicit set of valid, observed answers.

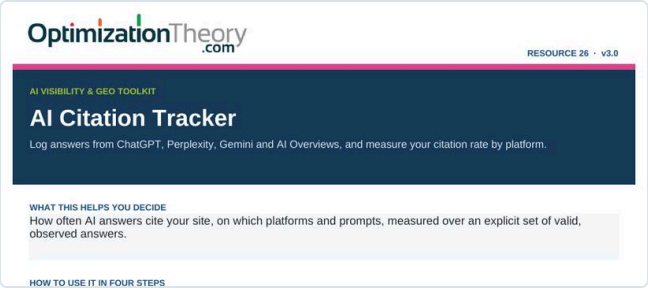
'Are we showing up in ChatGPT?' is now a board-level question, and most answers to it are anecdotes: someone tried a prompt and saw the brand mentioned. Anecdotes can't show change over time, can't be compared across platforms, and can't be audited.

This AI citation tracker logs each observed answer: prompt, platform, date, whether the answer was valid, whether it contained citations, whether your site was cited and which URL, plus evidence. It calculates eligible, cited and citation-bearing answers so your citation rate is always computed over a clear denominator, with a per-platform breakdown on the Dashboard.

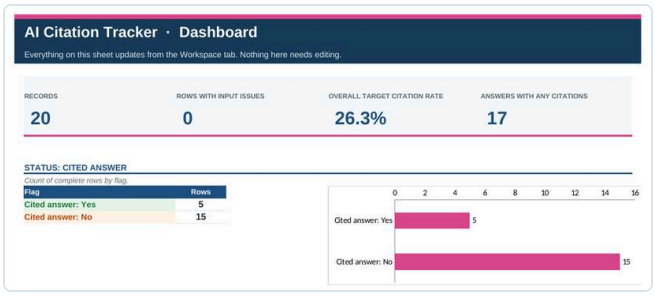
Who it's for

- SEOs and marketers tracking AI search visibility
- Brands proving GEO work is moving the needle
- Agencies reporting AI visibility without an expensive tool
- Teams validating what paid AI visibility tools report

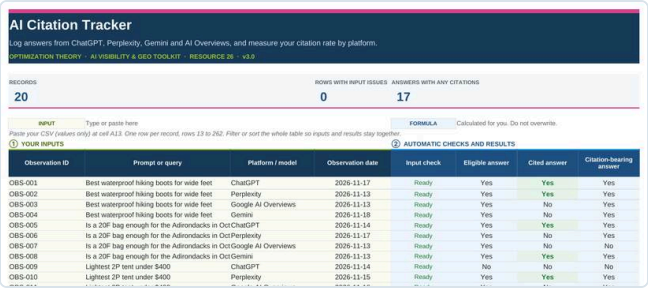
What's in the workbook



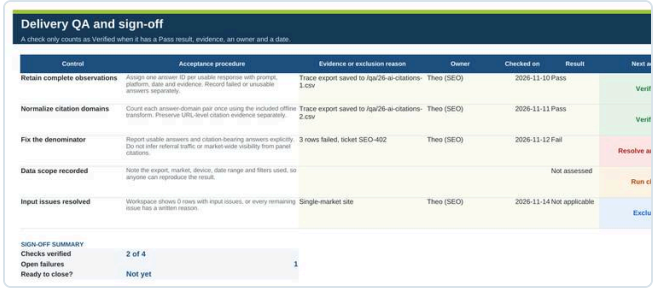
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Eligible answer = answer valid. Cited answer = valid and your site cited. Citation-bearing answer = valid and has any citations. Citation rate = cited ÷ eligible, overall and per platform.

The key formula, as written in the workbook

```
=IF(K13="","",IF(K13<>"Ready","n.a.",IF(AND(E13=1,G13=1),1,0)))
```

Result column	Plain-English formula	What it tells you
Eligible answer	Usable answer	Denominator contribution for overall observed-answer citation rate.
Cited answer	IF(AND(Usable answer=1,Target domain cited=1),1,0)	Numerator contribution for target citation rate.
Citation-bearing answer	IF(AND(Usable answer=1,Answer includes citations=1),1,0)	Alternative denominator for share among citation-bearing answers.

How to use it, step by step

1

Run the prompt panel

Use the prompts from your prompt research template. Run each on each platform, logged out where possible.

2

Log every answer

One row per answer with platform and date. Mark answer valid = 0 for errors or refusals.

3

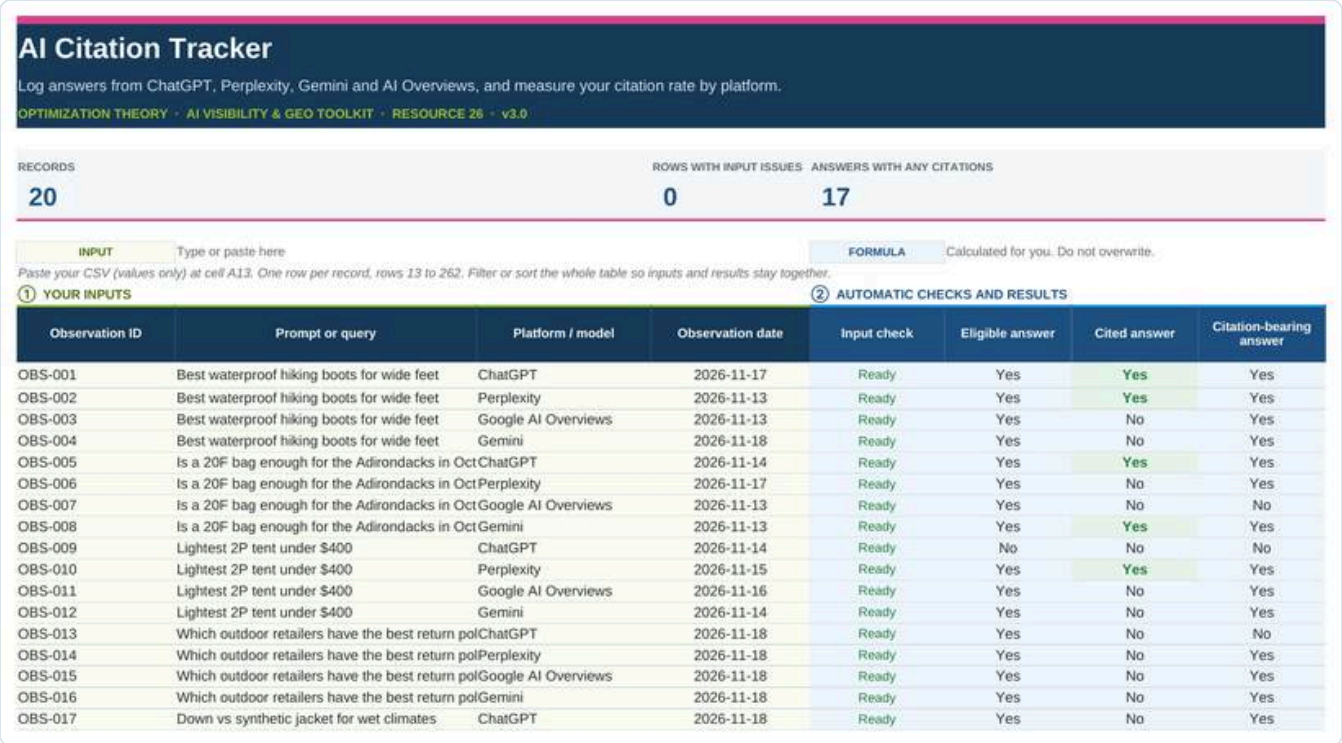
Record citations

Mark whether the answer had any citations and whether your domain was cited, and paste the cited URL.

4

Save evidence

Keep a screenshot or the answer text. AI answers aren't reproducible later.



AI Citation Tracker

Log answers from ChatGPT, Perplexity, Gemini and AI Overviews, and measure your citation rate by platform.

OPTIMIZATION THEORY · AI VISIBILITY & GEO TOOLKIT · RESOURCE 26 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	ANSWERS WITH ANY CITATIONS
20	0	17

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Observation ID	Prompt or query	Platform / model	Observation date	Input check	Eligible answer	Cited answer	Citation-bearing answer
OBS-001	Best waterproof hiking boots for wide feet	ChatGPT	2026-11-17	Ready	Yes	Yes	Yes
OBS-002	Best waterproof hiking boots for wide feet	Perplexity	2026-11-13	Ready	Yes	Yes	Yes
OBS-003	Best waterproof hiking boots for wide feet	Google AI Overviews	2026-11-13	Ready	Yes	No	Yes
OBS-004	Best waterproof hiking boots for wide feet	Gemini	2026-11-18	Ready	Yes	No	Yes
OBS-005	Is a 20F bag enough for the Adirondacks in Oct	ChatGPT	2026-11-14	Ready	Yes	Yes	Yes
OBS-006	Is a 20F bag enough for the Adirondacks in Oct	Perplexity	2026-11-17	Ready	Yes	No	Yes
OBS-007	Is a 20F bag enough for the Adirondacks in Oct	Google AI Overviews	2026-11-13	Ready	Yes	No	No
OBS-008	Is a 20F bag enough for the Adirondacks in Oct	Gemini	2026-11-13	Ready	Yes	Yes	Yes
OBS-009	Lightest 2P tent under $400	ChatGPT	2026-11-14	Ready	No	No	No
OBS-010	Lightest 2P tent under $400	Perplexity	2026-11-15	Ready	Yes	Yes	Yes
OBS-011	Lightest 2P tent under $400	Google AI Overviews	2026-11-16	Ready	Yes	No	Yes
OBS-012	Lightest 2P tent under $400	Gemini	2026-11-14	Ready	Yes	No	Yes
OBS-013	Which outdoor retailers have the best return pol	ChatGPT	2026-11-18	Ready	Yes	No	No
OBS-014	Which outdoor retailers have the best return pol	Perplexity	2026-11-18	Ready	Yes	No	Yes
OBS-015	Which outdoor retailers have the best return pol	Google AI Overviews	2026-11-18	Ready	Yes	No	Yes
OBS-016	Which outdoor retailers have the best return pol	Gemini	2026-11-18	Ready	Yes	No	Yes
OBS-017	Down vs synthetic jacket for wet climates	ChatGPT	2026-11-18	Ready	Yes	No	Yes

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO AI Optimization: LLM Mentions**: AI answers (ChatGPT or Google AI Overviews) that mention a domain or keyword, with their cited sources.

DataForSEO supplies the URL or query list and the audit trail; you add the measurements listed below.

1. Request the data

```
POST https://api.dataforseo.com/v3/ai_optimization/llm_mentions/search_mentions/live
[
  {
    "target": [
      {
        "domain": "yourdomain.com"
      }
    ],
    "platform": "chat_gpt",
    "location_code": 2840,
    "language_code": "en",
    "limit": 100
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 26 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Observation ID, Prompt or query, Platform / model	Observation date, Usable answer, Answer includes citations, Target domain cited, Target citation URL, Evidence

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

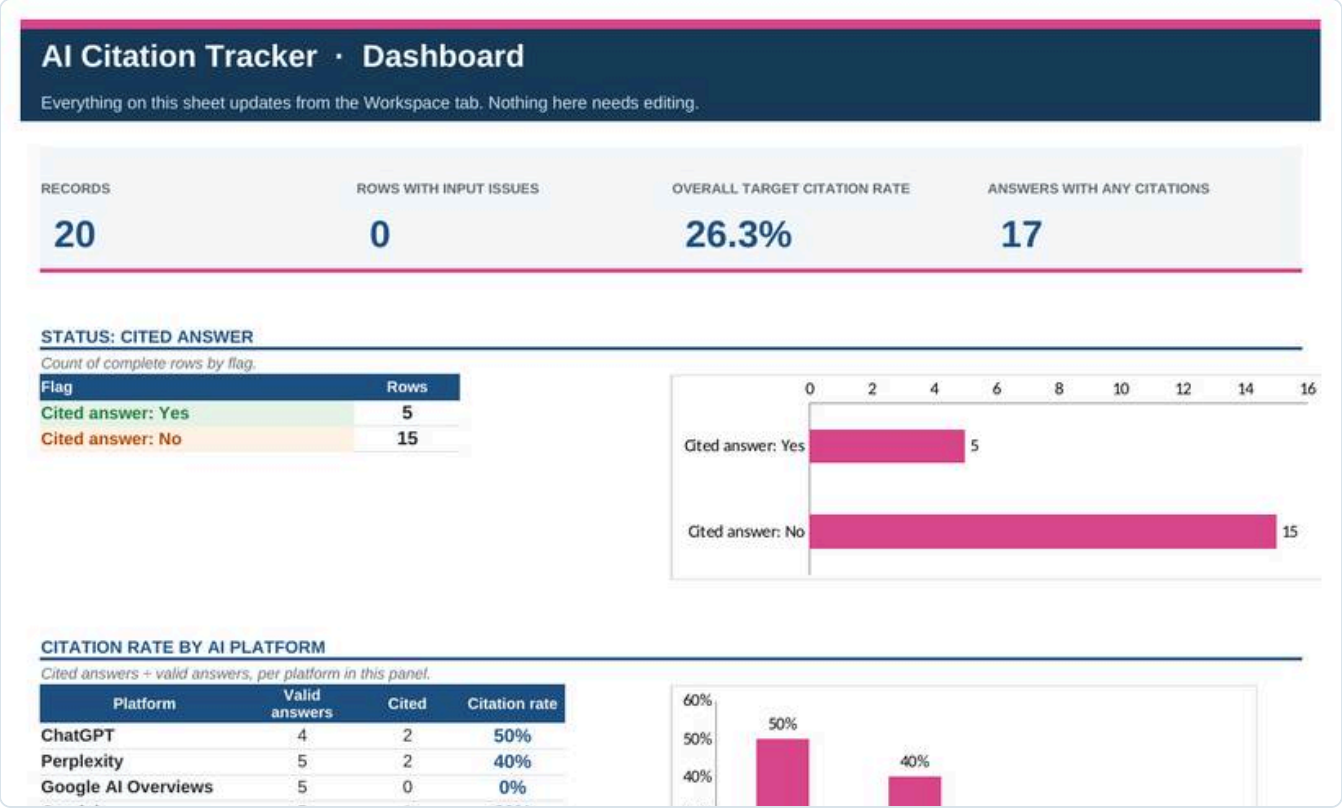
CSV field	Column	Meaning and rule	Typical source
observation_id	Observation ID	Unique prompt-platform-locale-run identifier.	DataForSEO: observation_id
prompt	Prompt or query	Exact observed question.	DataForSEO: question
platform	Platform / model	Observed platform and model label.	DataForSEO: platform_model
observed_date	Observation date	Date the response was collected, using one timezone.	Your records or manual review
answer_valid	Usable answer	1 only if a complete answer for the planned run was collected. 1 = Yes, 0 = No.	Your records or manual review
answer_has_citations	Answer includes citations	1 if the complete answer contains inspectable source links. 1 = Yes, 0 = No.	Your records or manual review
target_cited	Target domain cited	1 only when an exact target domain or approved subdomain appears in the source links. 1 = Yes, 0 = No.	Your records or manual review
citation_url	Target citation URL	The actual source URL, or NONE after checking a valid answer. Optional.	Your records or manual review
evidence	Evidence	Link to a dated crawl, screenshot, ticket or source that another reviewer can inspect.	Your records or manual review
source_ref	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 20 example rows.

20	0	26.3%	17
Records	Rows with input issues	Overall target citation rate	Answers with any citations

Across 20 example observations Northbeam is cited in about a quarter of valid answers. ChatGPT and Perplexity cite it most; Google AI Overviews didn't cite it once. That gap tells you where to focus.



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Report overall and conditional rates with their denominators. Separate platform, locale, prompt intent and collection date.

Limits. LLM Mentions results are a discovered corpus, not your complete test panel. Missing or failed runs are not negative citations.

Mistakes to avoid

Counting mentions as citations. A brand mention without a link is useful but different. Track it separately if you need it.

Dropping failed answers silently. Mark them invalid so the denominator stays honest.

Comparing cycles with different panels. Change the panel and you change the baseline. Keep it stable.

Tips from the field

Track the URL that gets cited; it tells you which content AI trusts.

Pair with the AI referral tracker to see whether citations send visits.

Use the share of voice calculator to compare with competitors in the same corpus.

Questions people ask

How do I track if ChatGPT cites my website?

Run a fixed set of prompts on a schedule, log each answer, and record whether your site is cited and which URL. This template calculates the citation rate.

What's the difference between a mention and a citation?

A citation links to or names your page as a source. A mention names your brand without sourcing it.

Which AI platforms should I track?

Usually ChatGPT, Perplexity, Google AI Overviews and Gemini, plus AI Mode, Copilot or Claude if your audience uses them.

Can I track AI citations for free?

Yes, manually with a spreadsheet like this one. Tools automate it at scale, but the measurement logic is the same.

Templates that work well with this one

AI Prompt Research Template

Turn real customer tasks and keywords into a weighted prompt panel for ChatGPT, Perplexity, Gemini and AI Overviews.

AI Share of Voice Calculator

Compare citation rate and share across competitor domains inside one fixed set of AI answers.

AI Referral Traffic Tracker

Measure sessions, conversion rate and contribution per session from ChatGPT, Perplexity, Gemini, Copilot and Claude.

Answer Evidence Audit Template

Check every claim for a supporting source, original value, clarity and freshness, so AI answers can quote and cite it.

Brand Entity Consistency Audit

Compare your official brand facts with Wikidata, LinkedIn, GBP, Yelp and more, and log every correction request.

SEO Content Brief Template

A content brief built for Google and AI answers: real questions, original evidence, sources and a three-step approval workflow.

Read the full tutorial online: **optimizationtheory.com/download-view/ai-citation-tracker/**
Get all six templates in the **AI Visibility & GEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

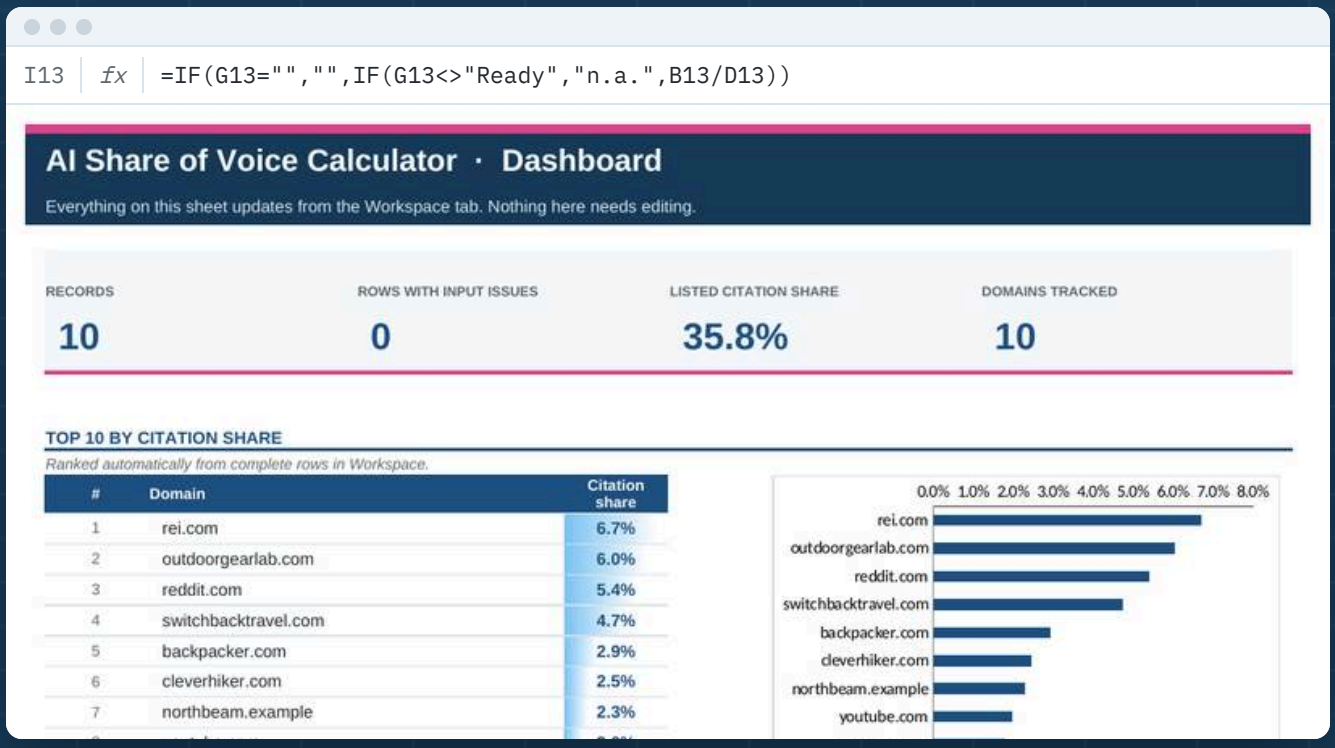
OptimizationTheory.com

AI Visibility & GEO Toolkit, resource 27

AI Share of Voice Calculator

Compare citation rate and share across competitor domains inside one fixed set of AI answers.

Built for the DataForSEO API: AI Optimization: LLM Mentions



I13 | *fx* | =IF(G13="","",IF(G13<>"Ready","n.a.",B13/D13))

AI Share of Voice Calculator · Dashboard

Everything on this sheet updates from the Workspace tab. Nothing here needs editing.

RECORDS	ROWS WITH INPUT ISSUES	LISTED CITATION SHARE	DOMAINS TRACKED
10	0	35.8%	10

TOP 10 BY CITATION SHARE

Ranked automatically from complete rows in Workspace.

#	Domain	Citation share
1	rei.com	6.7%
2	outdoorgearlab.com	6.0%
3	reddit.com	5.4%
4	switchbacktravel.com	4.7%
5	backpacker.com	2.9%
6	cleverhiker.com	2.5%
7	northbeam.example	2.3%

Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

How your domain's AI citation rate and share compare with competitors' within the same answer corpus.

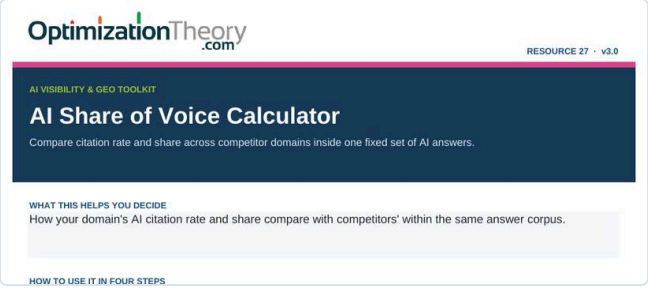
Your citation rate means more with context. Being cited in 12% of answers is excellent in a category where the leader gets 15% and poor where competitors average 40%. AI share of voice puts your number next to theirs.

This AI share of voice calculator works from one fixed corpus of AI answers. For each domain, enter the answers that cite it, the valid answers in the corpus and the total domain citations. It calculates each domain's citation rate and share of all citations, ranked on the Dashboard.

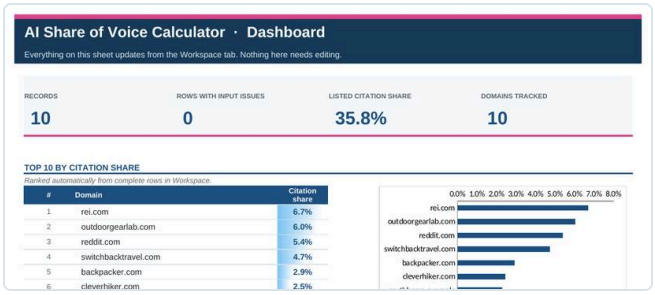
Who it's for

- Brands benchmarking AI visibility against competitors
- Agencies building GEO competitive reports
- SEOs choosing which competitors' content to study
- Teams tracking whether GEO work closes the gap

What's in the workbook



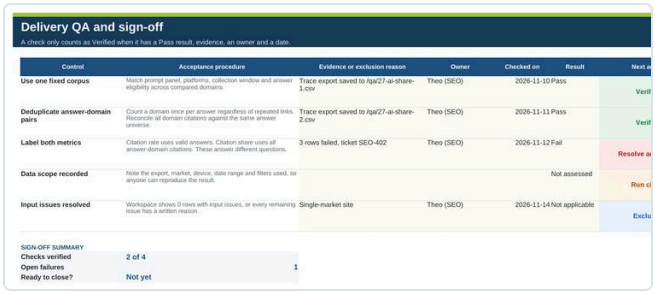
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Citation rate = answers citing the domain ÷ valid answers. Citation share = answers citing the domain ÷ total unique answer-domain citations. Shares add up to 100% across all domains in the corpus.

The key formula, as written in the workbook

```
=IF(G13="","",IF(G13<>"Ready","n.a.",B13/D13))
```

Result column	Plain-English formula	What it tells you
Domain citation rate	Answers citing domain ÷ Valid corpus answers	Share of corpus answers citing this domain. Several domains can occur in one answer.
Citation share	Answers citing domain ÷ All answer-domain citations	Share of answer-domain pairs attributed to this domain.

How to use it, step by step

1

Define the corpus

Choose the prompt panel and cycle. All domains are measured against the same set of answers.

2

Count citations per domain

Count answers citing each domain (once per answer) and the total domain citations across the corpus.

3

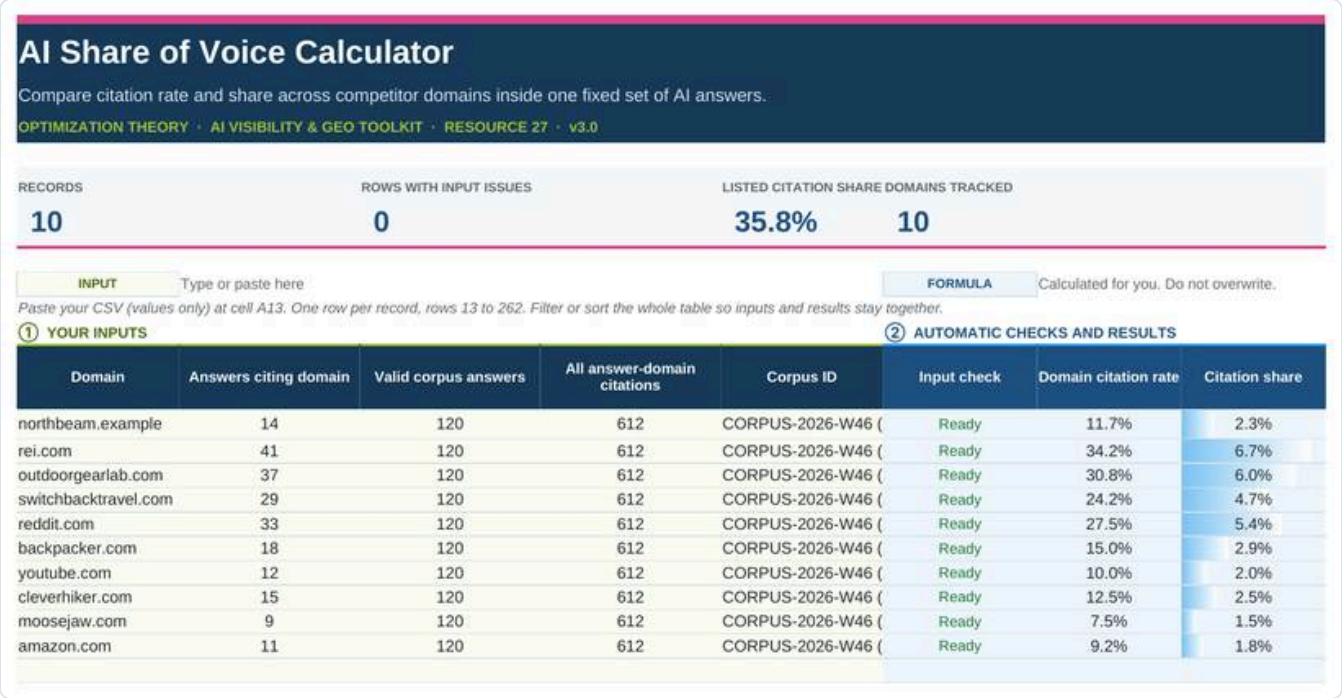
Enter the corpus ID

Label the corpus so future cycles are comparable.

4

Study the leaders

Open the top-cited domains' cited URLs. That's the content AI trusts in your category.



AI Share of Voice Calculator

Compare citation rate and share across competitor domains inside one fixed set of AI answers.

OPTIMIZATION THEORY · AI VISIBILITY & GEO TOOLKIT · RESOURCE 27 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	LISTED CITATION SHARE DOMAINS TRACKED	
10	0	35.8%	10

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Domain	Answers citing domain	Valid corpus answers	All answer-domain citations	Corpus ID	Input check	Domain citation rate	Citation share
northbeam.example	14	120	612	CORPUS-2026-W46 (	Ready	11.7%	2.3%
rei.com	41	120	612	CORPUS-2026-W46 (	Ready	34.2%	6.7%
outdoorgearlab.com	37	120	612	CORPUS-2026-W46 (	Ready	30.8%	6.0%
switchbacktravel.com	29	120	612	CORPUS-2026-W46 (	Ready	24.2%	4.7%
reddit.com	33	120	612	CORPUS-2026-W46 (	Ready	27.5%	5.4%
backpacker.com	18	120	612	CORPUS-2026-W46 (	Ready	15.0%	2.9%
youtube.com	12	120	612	CORPUS-2026-W46 (	Ready	10.0%	2.0%
cleverhiker.com	15	120	612	CORPUS-2026-W46 (	Ready	12.5%	2.5%
moosejaw.com	9	120	612	CORPUS-2026-W46 (	Ready	7.5%	1.5%
amazon.com	11	120	612	CORPUS-2026-W46 (	Ready	9.2%	1.8%

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO AI Optimization: LLM Mentions**: AI answers (ChatGPT or Google AI Overviews) that mention a domain or keyword, with their cited sources.

A helper command builds the input rows from saved API responses. Count citations per domain from your LLM Mentions responses (or from the AI Citation Tracker), one count per answer per domain, then fill the CSV.

1. Request the data

```
POST https://api.dataforseo.com/v3/ai_optimization/llm_mentions/search_mentions/live
[
  {
    "target": [
      {
        "domain": "yourdomain.com"
      }
    ],
    "platform": "chat_gpt",
    "location_code": 2840,
    "language_code": "en",
    "limit": 100
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

Fills automatically	You add
Source reference (audit trail)	Domain, Answers citing domain, Valid corpus answers, All answer-domain citations, Corpus ID

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`domain`	Domain	One normalized root or host domain under a documented grouping rule.	Your records or manual review
`cited_answers`	Answers citing domain	Count each domain at most once per valid answer in the same corpus.	Your records or manual review
`valid_answers`	Valid corpus answers	Same complete observed-answer denominator repeated for each domain.	Your records or manual review
`all_domain_citations`	All answer-domain citations	Total unique answer-domain pairs across the declared domain universe. Same denominator for every row.	Your records or manual review
`corpus_id`	Corpus ID	Stable panel/corpus, locale, platform and date scope identifier.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

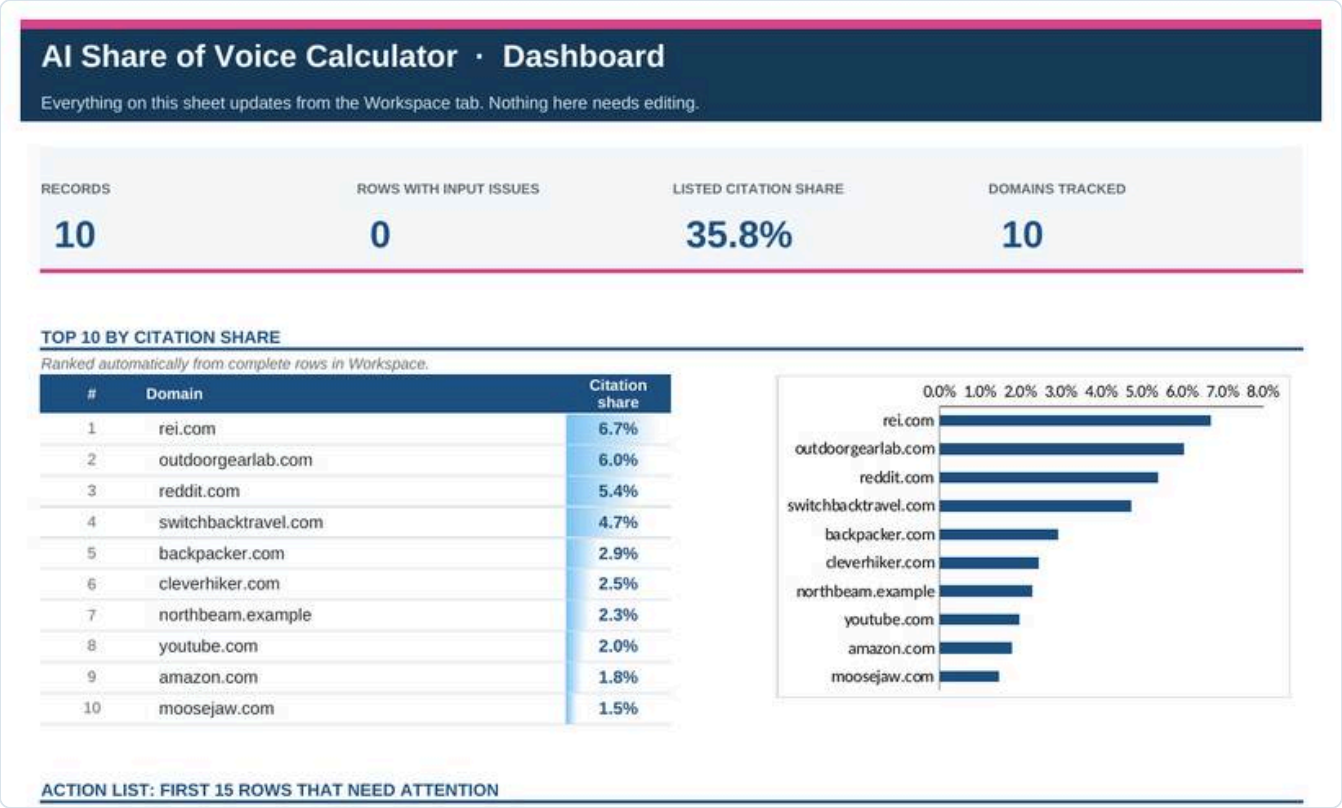
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 10 example rows.

10	0	35.8%	10
Records	Rows with input issues	Listed citation share	Domains tracked

In the example corpus REI and OutdoorGearLab lead, with Reddit close behind. Northbeam sits seventh of ten domains, which makes the gap to close concrete.

Top 10 by citation share

#	Domain	Citation share
1	rei.com	6.7%
2	outdoorgearlab.com	6.0%
3	reddit.com	5.4%
4	switchbacktravel.com	4.7%
5	backpacker.com	2.9%



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Citation rates across domains can sum above 100% because one answer can cite several domains. Citation shares sum to 100% only when every universe domain is listed.

Limits. Target-filtered mention results can bias the corpus. Do not compare different platform or locale samples as one denominator.

Mistakes to avoid

Mixing corpora. Comparing domains from different prompt sets isn't share of voice.

Counting repeated citations in one answer. Count a domain once per answer so long answers don't dominate.

Ignoring forums and video. Reddit and YouTube are often among the most-cited domains. Include them.

Tips from the field

Feed counts from the AI citation tracker or your AI visibility tool's export.

Track the same competitors every cycle.

Look at which page types competitors get cited for and plan content accordingly.

Questions people ask

What is AI share of voice?

Your share of all citations (or mentions) in AI answers for a defined set of prompts, compared with competitors.

How is citation share different from citation rate?

Rate is how often you're cited per answer. Share is your portion of all citations across all domains.

How many answers do I need?

Enough that a few answers don't swing the result. A hundred or more valid answers per cycle is a sensible starting point.

Which tools measure AI share of voice?

Several AI visibility tools do it automatically. This calculator works with their exports or your own manual corpus.

Templates that work well with this one

AI Citation Tracker

Log answers from ChatGPT, Perplexity, Gemini and AI Overviews, and measure your citation rate by platform.

AI Prompt Research Template

Turn real customer tasks and keywords into a weighted prompt panel for ChatGPT, Perplexity, Gemini and AI Overviews.

Keyword Gap Analysis Template

Find the queries your competitors rank for that you don't, and size each gap in potential clicks.

AI Referral Traffic Tracker

Measure sessions, conversion rate and contribution per session from ChatGPT, Perplexity, Gemini, Copilot and Claude.

Brand Entity Consistency Audit

Compare your official brand facts with Wikidata, LinkedIn, GBP, Yelp and more, and log every correction request.

SEO Visibility Score Calculator

Weight rankings by search volume and CTR to see real visibility gains and losses across a fixed keyword set.

Read the full tutorial online: **optimizationtheory.com/download-view/ai-share-of-voice-calculator/**
Get all six templates in the **AI Visibility & GEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

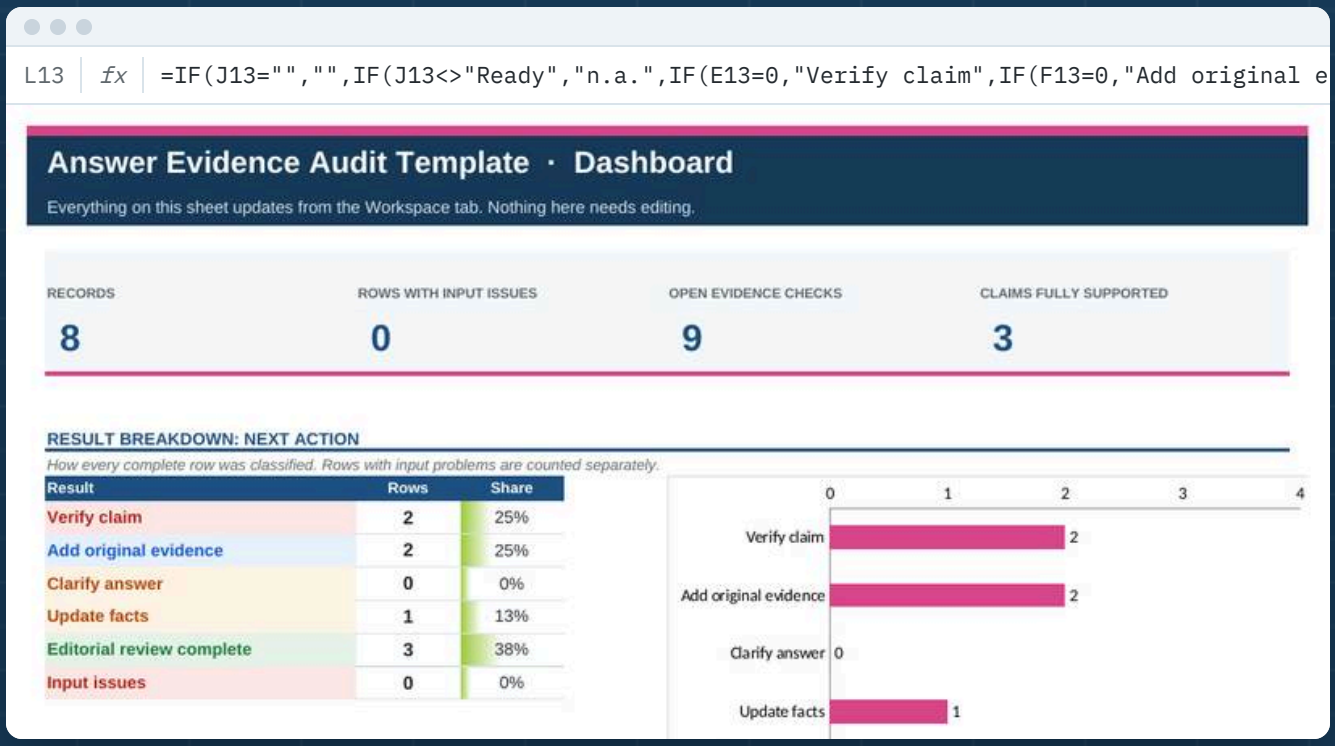
OptimizationTheory.com

AI Visibility & GEO Toolkit, resource 28

Answer Evidence Audit Template

Check every claim for a supporting source, original value, clarity and freshness, so AI answers can quote and cite it.

Built for the DataForSEO API: On-Page API



Jourdan Rombough, optimizationtheory.com

What this template decides

Which claims on a page are verified, original, clear and current, and what each unfinished claim needs next.

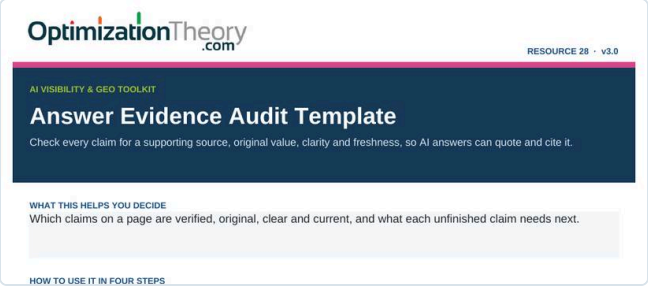
AI answer engines lift short, specific passages and cite where they came from. Pages that make vague claims, repeat what everyone else says, or cite nothing are easy to summarize and easy to skip. Pages with clear, sourced, original answers are what gets quoted.

This GEO content audit template (we call it the Answer Evidence Audit) breaks a page into question and claim pairs. Each claim is checked for four things: a primary source that supports it, original value, a clear answer, and current information. The template counts open checks and tells you the next action for each claim.

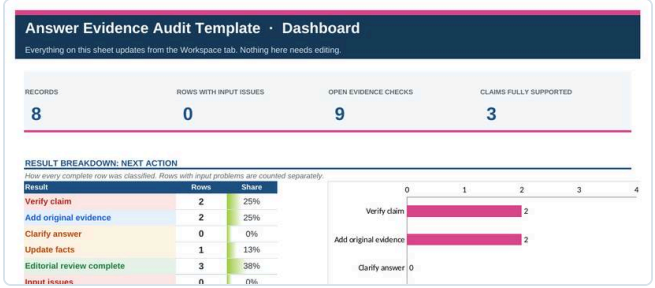
Who it's for

- SEOs optimizing pages for AI Overviews, ChatGPT and Perplexity
- Editors fact-checking high-value pages
- Subject matter experts reviewing content
- Teams refreshing pages that rank but aren't cited

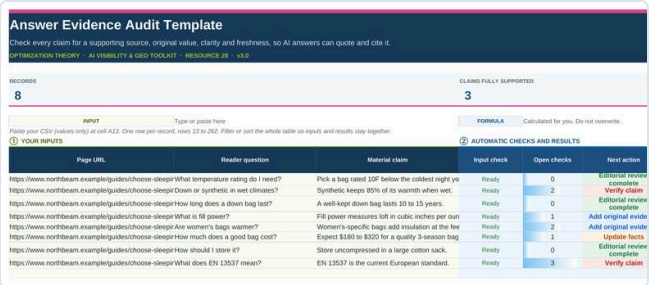
What's in the workbook



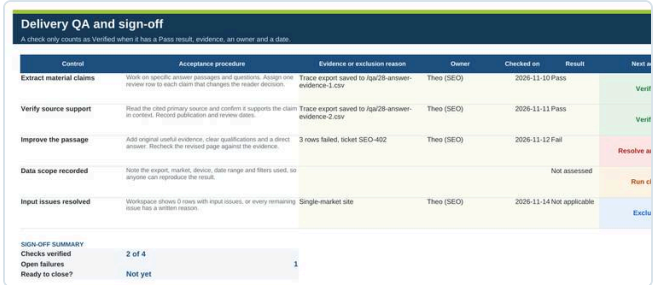
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Open checks = 4 – (source supports + original value + answer clear + current). Next action follows the first failed check in order: Verify claim, Add original evidence, Clarify answer, Update facts, otherwise Editorial review complete.

The key formula, as written in the workbook

```
=IF(J13="","",IF(J13<>"Ready","n.a.",IF(E13=0,"Verify claim",IF(F13=0,"Add original evidence",IF(G13
=0,"Clarify answer",IF(H13=0,"Update facts","Editorial review complete"))))))
```

Result column	Plain-English formula	What it tells you
Open checks	4-SUM(Source supports claim,Original contribution,Answer clear in context,Current as of review)	Unmet editorial evidence checks.
Next action	IF(Source supports claim=0,"Verify claim",IF(Original contribution=0,"Add original evidence",IF(Answer clear in context=0,"Clarify answer",IF(Current as of review=0,"Update facts","Editorial review complete"))))	First unmet evidence task.

The results you'll see

Verify claim | Add original evidence | Clarify answer | Update facts | Editorial review complete

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Pick a high-value page

Start with pages that rank but aren't cited in AI answers.

2

List question and claim pairs

Write the question each section answers and the one-sentence claim it makes.

3

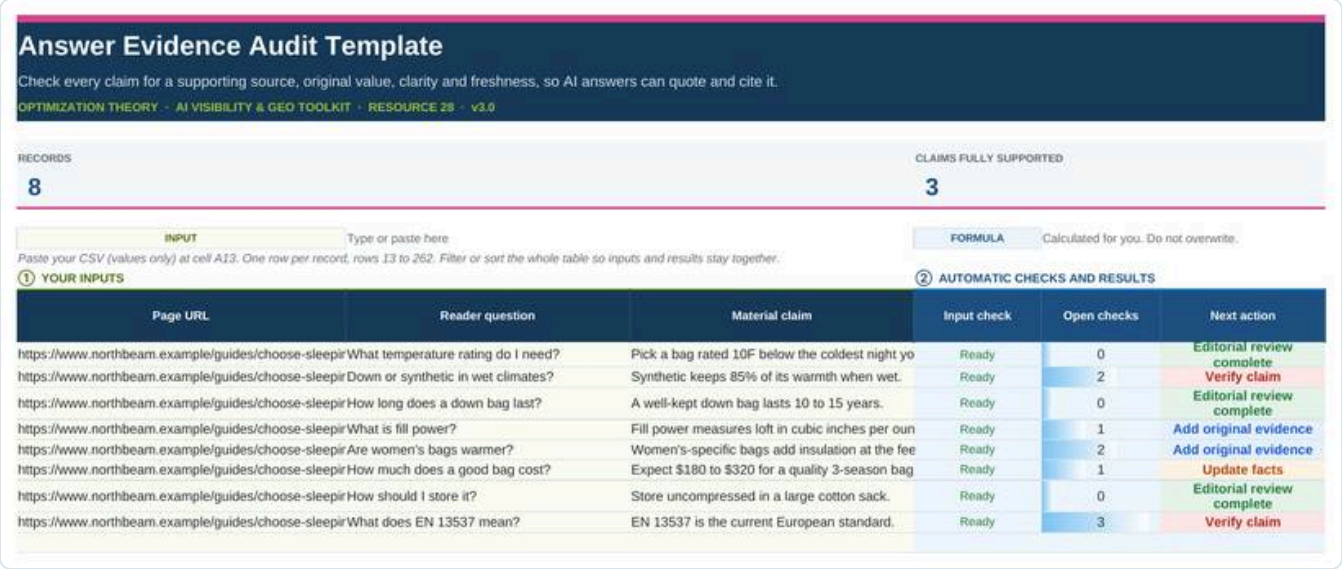
Check the evidence

Record the primary source. Mark supports, original value, clear and current as 1 or 0.

4

Work the next actions

Verify claims first, then add original evidence, clarify, and update facts.



Answer Evidence Audit Template

Check every claim for a supporting source, original value, clarity and freshness, so AI answers can quote and cite it.

OPTIMIZATION THEORY · AI VISIBILITY & GEO TOOLKIT · RESOURCE 28 · v3.0

RECORDS 8

CLAIMS FULLY SUPPORTED 3

INPUT Type or paste here

FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS

② AUTOMATIC CHECKS AND RESULTS

Page URL	Reader question	Material claim	Input check	Open checks	Next action
https://www.northbeam.example/guides/choose-sleepir	What temperature rating do I need?	Pick a bag rated 10F below the coldest night yo	Ready	0	Editorial review complete
https://www.northbeam.example/guides/choose-sleepir	Down or synthetic in wet climates?	Synthetic keeps 85% of its warmth when wet.	Ready	2	Verify claim
https://www.northbeam.example/guides/choose-sleepir	How long does a down bag last?	A well-kept down bag lasts 10 to 15 years.	Ready	0	Editorial review complete
https://www.northbeam.example/guides/choose-sleepir	What is fill power?	Fill power measures loft in cubic inches per oun	Ready	1	Add original evidence
https://www.northbeam.example/guides/choose-sleepir	Are women's bags warmer?	Women's-specific bags add insulation at the fee	Ready	2	Add original evidence
https://www.northbeam.example/guides/choose-sleepir	How much does a good bag cost?	Expect $180 to $320 for a quality 3-season bag	Ready	1	Update facts
https://www.northbeam.example/guides/choose-sleepir	How should I store it?	Store uncompressed in a large cotton sack.	Ready	0	Editorial review complete
https://www.northbeam.example/guides/choose-sleepir	What does EN 13537 mean?	EN 13537 is the current European standard.	Ready	3	Verify claim

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

This is a sign-off workflow. DataForSEO responses are the evidence you attach; the human checks stay manual by design.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 28 --csv --input my-filled.csv --output my
-inputs.csv
```

Fills automatically	You add
Page URL	Reader question, Material claim, Primary source, Source supports claim, Original contribution, Answer clear in context, Current as of review

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`url`	Page URL	Exact absolute URL. Keep case and query parameters unless a documented normalization rule applies.	DataForSEO: url
`question`	Reader question	One specific question the passage answers.	Your records or manual review
`claim`	Material claim	A factual claim or calculation requiring support.	Your records or manual review
`primary_source`	Primary source	Inspectable source URL or documented original dataset.	Your records or manual review
`source_supports`	Source supports claim	1 after checking the source supports the exact claim. 1 = Yes, 0 = No.	Your records or manual review
`original_value`	Original contribution	1 after verifying a useful original example, measurement or expert observation. 1 = Yes, 0 = No.	Your records or manual review
`answer_clear`	Answer clear in context	1 after editorial review for clarity and context. 1 = Yes, 0 = No.	Your records or manual review
`current`	Current as of review	1 after checking facts and source dates for this review. 1 = Yes, 0 = No.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

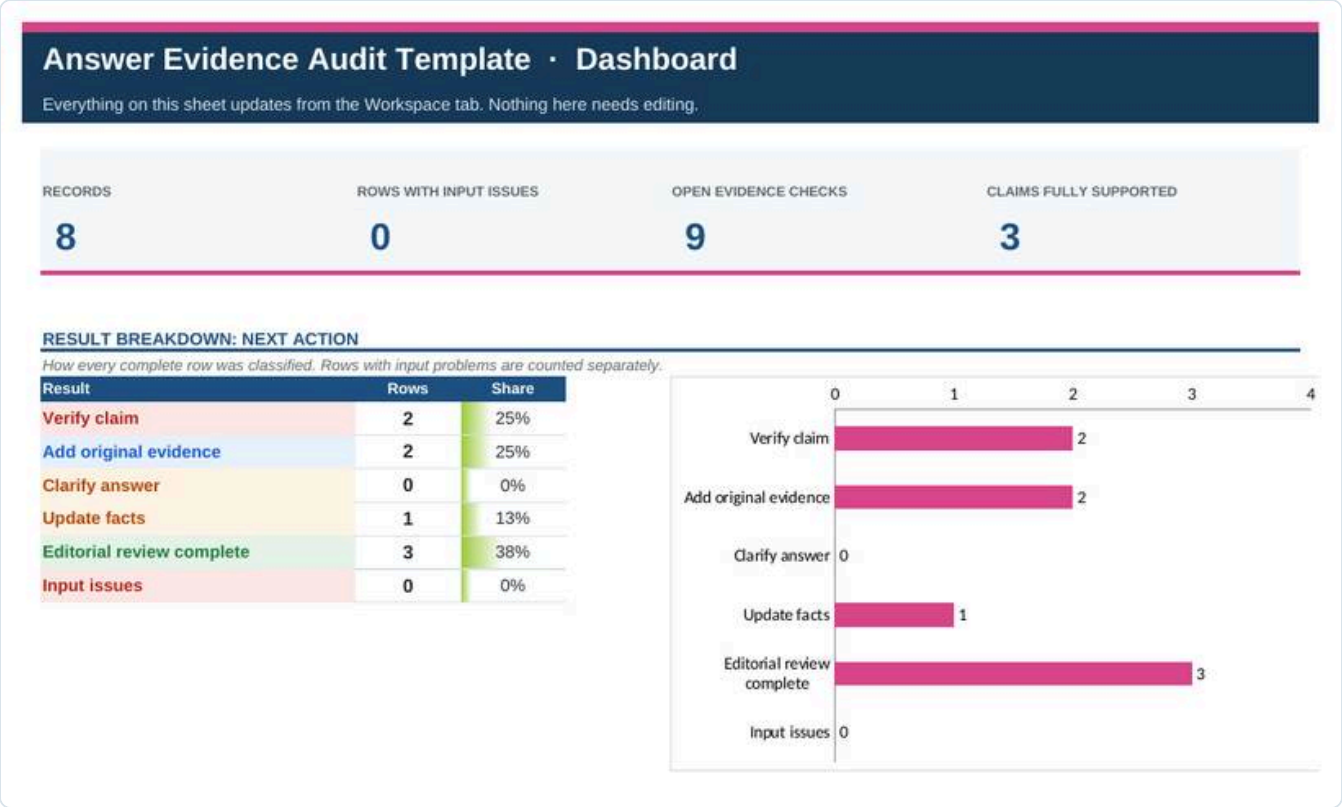
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 8 example rows.

8	0	9	3
Records	Rows with input issues	Open evidence checks	Claims fully supported

The example sleeping bag guide has a claim copied from a forum with no source, and one citing a standard that was replaced in 2016. Both are exactly the kind of errors an AI system can contradict.

Top 10 by open checks

#	Page URL	Open checks
1	https://www.northbeam.example/guides/choose-sleeping-bag/	3
2	https://www.northbeam.example/guides/choose-sleeping-bag/	2
3	https://www.northbeam.example/guides/choose-sleeping-bag/	2
4	https://www.northbeam.example/guides/choose-sleeping-bag/	1
5	https://www.northbeam.example/guides/choose-sleeping-bag/	1



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Use this to improve content quality and auditability. Keep the answer useful to the reader rather than writing for a supposed machine score.

Limits. These are Optimization Theory workflow checks. Google and AI platforms do not publish this as a citation formula.

Mistakes to avoid

Citing secondary sources. Link to the primary source: the standard, the study, the official documentation.

Writing around the answer. Put the direct answer in the first sentence of the section, then explain.

Updating the date, not the facts. Freshness means the facts are current, not just the timestamp.

Tips from the field

Run this on every page in your content brief workflow before publishing.

Track which claims get cited using the AI citation tracker.

Original data is the strongest citation magnet. Add a number only you have.

Questions people ask

What is a GEO content audit?

A review of a page's claims and answers to make them accurate, sourced, original and clear enough for AI answer engines to quote and cite.

How do I get cited in AI Overviews?

Rank well, answer specific questions clearly, support claims with primary sources and add original information. There's no special markup that guarantees it.

What counts as original value?

Your own data, tests, photos, expert experience or analysis that isn't available on other pages.

How often should I audit answers?

Whenever facts change, and at least annually for high-value pages.

Templates that work well with this one

SEO Content Brief Template

A content brief built for Google and AI answers: real questions, original evidence, sources and a three-step approval workflow.

AI Citation Tracker

Log answers from ChatGPT, Perplexity, Gemini and AI Overviews, and measure your citation rate by platform.

Brand Entity Consistency Audit

Compare your official brand facts with Wikidata, LinkedIn, GBP, Yelp and more, and log every correction request.

Schema Markup Audit Template

Check presence, syntax, required fields, visible-content match and policy for every structured data type you ship.

Content Decay Analysis Template

Separate lost impressions, lower CTR and falling demand, so you refresh the pages that really decayed.

AI Prompt Research Template

Turn real customer tasks and keywords into a weighted prompt panel for ChatGPT, Perplexity, Gemini and AI Overviews.

Read the full tutorial online: **optimizationtheory.com/download-view/geo-content-audit-template/**
Get all six templates in the **AI Visibility & GEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

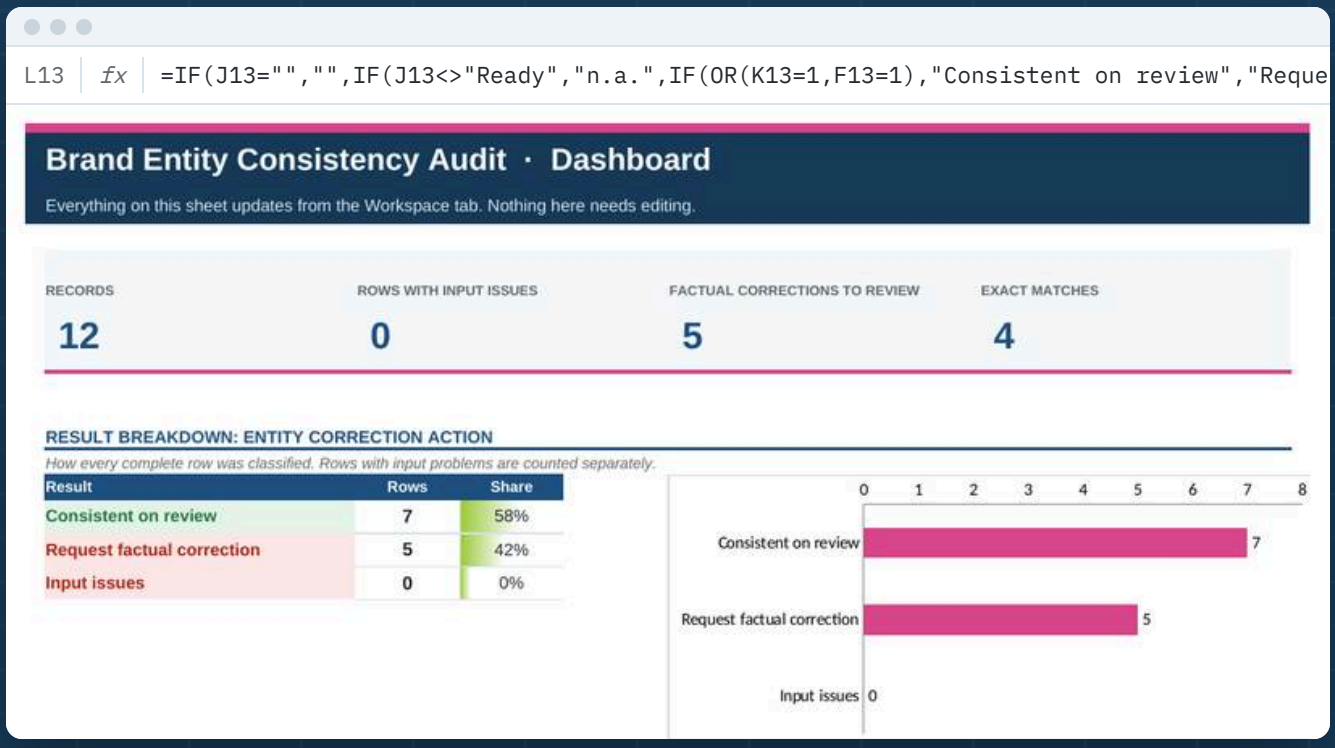
OptimizationTheory.com

AI Visibility & GEO Toolkit, resource 29

Brand Entity Consistency Audit

Compare your official brand facts with Wikidata, LinkedIn, GBP, Yelp and more, and log every correction request.

Built for the DataForSEO API: AI Optimization: LLM Mentions



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which third-party profiles state your brand facts incorrectly, and which corrections to request and from whom.

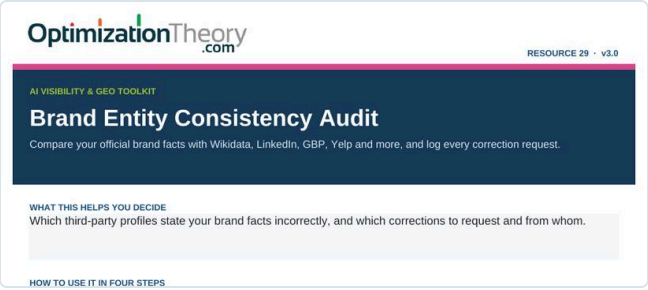
Search engines and AI systems build their picture of your brand from many sources at once: your site, Google Business Profile, Wikidata, LinkedIn, Crunchbase, review sites, directories. When those sources disagree on your founding year, phone number or return policy, AI answers can repeat the wrong one with confidence.

This entity SEO audit template records the official value for each entity attribute and the value observed on each third-party source. It checks for an exact text match, lets a reviewer confirm semantic matches (Albany, NY vs Albany, New York), and flags everything else as Request factual correction, with an owner and review date.

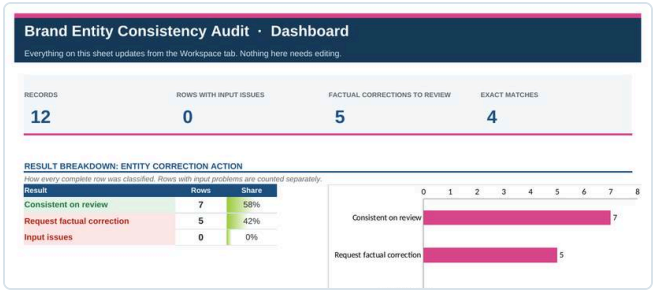
Who it's for

- Brand and SEO teams managing knowledge panels and AI answers
- Local businesses keeping NAP data consistent
- Companies after a rebrand, move or policy change
- Agencies running entity audits for clients

What's in the workbook



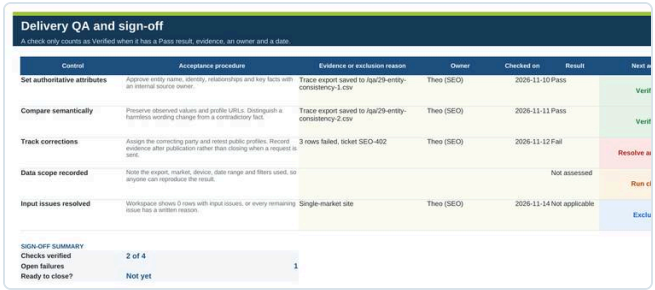
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Exact text match = 1 when the official and observed values are identical (case-sensitive). The action is Consistent on review when there's an exact or confirmed semantic match, otherwise Request factual correction.

The key formula, as written in the workbook

```
=IF(J13="","",IF(J13<>"Ready","n.a.",IF(OR(K13=1,F13=1),"Consistent on review","Request factual correction")))
```

Result column	Plain-English formula	What it tells you
Exact text match	IF(EXACT(Official value,Observed value),1,0)	Case-sensitive text comparison.
Entity correction action	IF(OR(Exact text match=1,Human semantic match=1),"Consistent on review","Request factual correction")	Uses human semantic review before treating text differences as contradictions.

The results you'll see

Consistent on review Request factual correction

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Write the official facts

List each entity (company, locations, people) and attribute with the authoritative value.

2

Collect observed values

Check each source: Google Business Profile, Apple, Bing, Wikidata, Wikipedia, LinkedIn, Crunchbase, Yelp, BBB, industry directories.

3

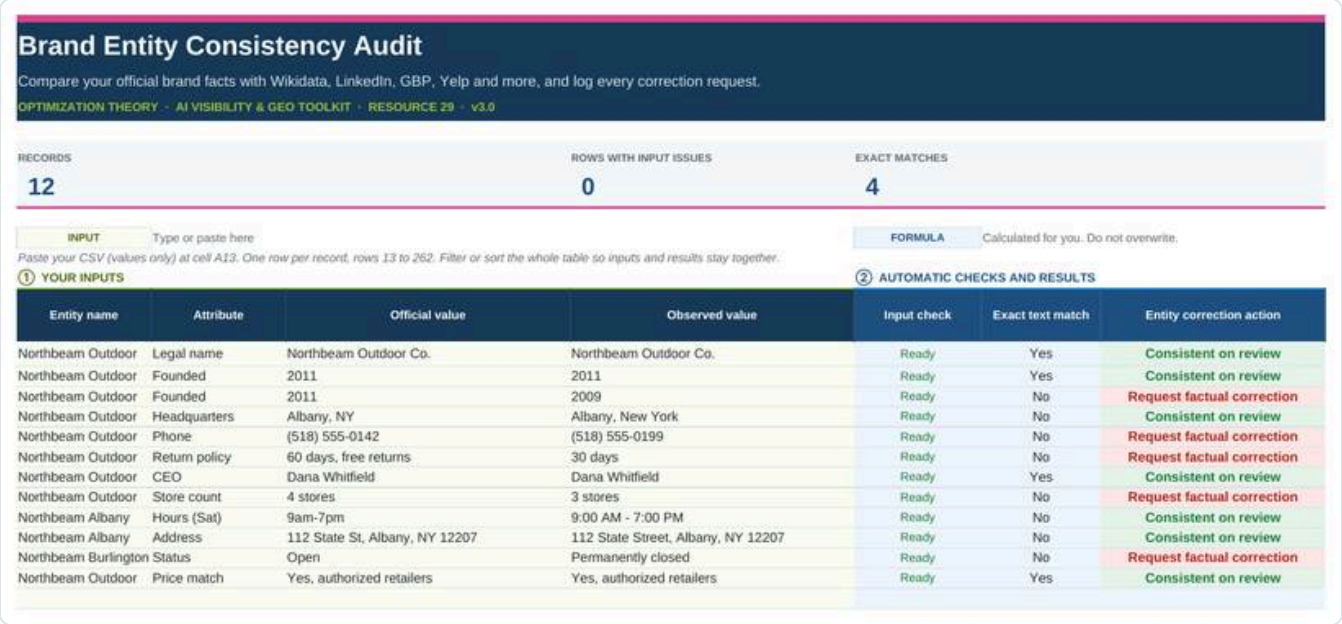
Confirm semantic matches

Mark 1 where the wording differs but the fact is the same.

4

Request corrections

Work the action list. Log the request, the owner and the date; recheck later.



Brand Entity Consistency Audit

Compare your official brand facts with Wikidata, LinkedIn, GBP, Yelp and more, and log every correction request.

OPTIMIZATION THEORY · AI VISIBILITY & GEO TOOLKIT · RESOURCE 29 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	EXACT MATCHES
12	0	4

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Entity name	Attribute	Official value	Observed value	Input check	Exact text match	Entity correction action
Northbeam Outdoor	Legal name	Northbeam Outdoor Co.	Northbeam Outdoor Co.	Ready	Yes	Consistent on review
Northbeam Outdoor	Founded	2011	2011	Ready	Yes	Consistent on review
Northbeam Outdoor	Founded	2011	2009	Ready	No	Request factual correction
Northbeam Outdoor	Headquarters	Albany, NY	Albany, New York	Ready	No	Consistent on review
Northbeam Outdoor	Phone	(518) 555-0142	(518) 555-0199	Ready	No	Request factual correction
Northbeam Outdoor	Return policy	60 days, free returns	30 days	Ready	No	Request factual correction
Northbeam Outdoor	CEO	Dana Whitfield	Dana Whitfield	Ready	Yes	Consistent on review
Northbeam Outdoor	Store count	4 stores	3 stores	Ready	No	Request factual correction
Northbeam Albany	Hours (Sat)	9am-7pm	9:00 AM - 7:00 PM	Ready	No	Consistent on review
Northbeam Albany	Address	112 State St, Albany, NY 12207	112 State Street, Albany, NY 12207	Ready	No	Consistent on review
Northbeam Burlington	Status	Open	Permanently closed	Ready	No	Request factual correction
Northbeam Outdoor	Price match	Yes, authorized retailers	Yes, authorized retailers	Ready	Yes	Consistent on review

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO AI Optimization: LLM Mentions**: AI answers (ChatGPT or Google AI Overviews) that mention a domain or keyword, with their cited sources.

This is a sign-off workflow. DataForSEO responses are the evidence you attach; the human checks stay manual by design.

1. Request the data

```
POST https://api.dataforseo.com/v3/ai_optimization/llm_mentions/search_mentions/live
[
  {
    "target": [
      {
        "domain": "yourdomain.com"
      }
    ],
    "platform": "chat_gpt",
    "location_code": 2840,
    "language_code": "en",
    "limit": 100
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 29 --csv --input my-filled.csv --output my
-inputs.csv
```

Fills automatically	You add
Observed source URL	Entity name, Attribute, Official value, Observed value, Human semantic match, Owner, Review date

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`entity`	Entity name	Exact organization, person or product being audited.	Your records or manual review
`attribute`	Attribute	One field such as official name, address, product name or service area.	Your records or manual review
`official_value`	Official value	Verified value from the authoritative record.	Your records or manual review
`observed_value`	Observed value	Value found in the cited profile or answer.	Your records or manual review
`source_url`	Observed source URL	URL of the profile or source being audited.	DataForSEO: url
`semantic_match`	Human semantic match	1 only after checking whether harmless formatting differences preserve meaning. 1 = Yes, 0 = No.	Your records or manual review
`owner`	Owner	Person accountable for the next action.	Your records or manual review
`review_date`	Review date	Date the claim was checked.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

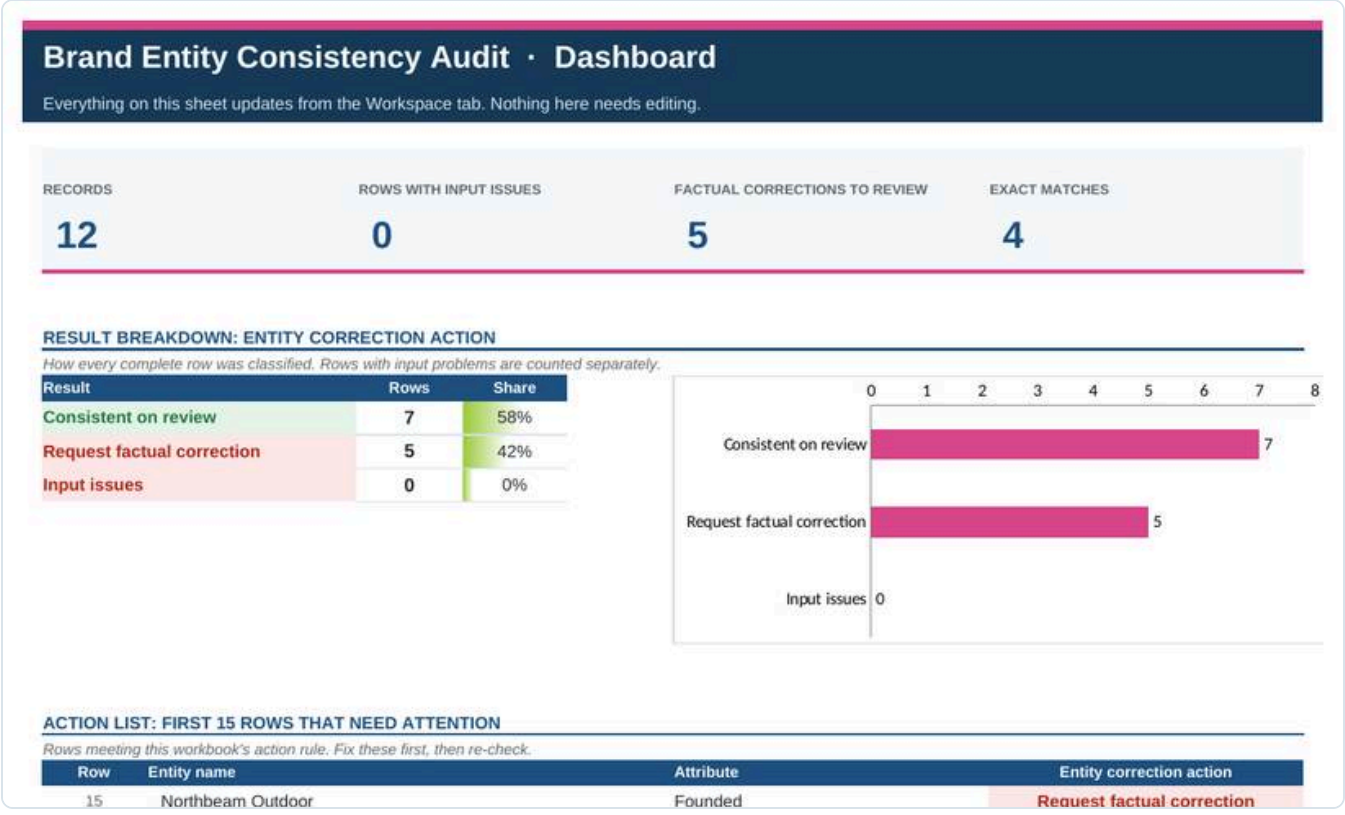
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 12 example rows.

12	0	5	4
Records	Rows with input issues	Factual corrections to review	Exact matches

Five example corrections are needed, including a store Bing still shows as permanently closed and a 30-day return policy quoted on BBB when the real policy is 60 days, which is exactly what an AI answer about returns would repeat.

Result breakdown

Result	Rows	Share
Consistent on review	7	58%
Request factual correction	5	42%
Input issues	0	0%



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Fix actual contradictions before polishing harmless name or URL formatting variations.

Limits. Mention discovery does not establish truth. Official records, product data and authorized business owners supply authoritative facts.

Mistakes to avoid

Fixing your own site last. Your site and structured data should be the canonical source others can verify against.

Ignoring Wikidata. Many knowledge systems draw on it. If your entry is wrong or missing, fix it with sources.

Requesting once and forgetting. Third-party corrections take time. Set a review date and recheck.

Tips from the field

Add Organization and LocalBusiness schema with sameAs links to verified profiles.

Ask AI platforms about your brand facts in the citation tracker to see which errors surface.

Re-run after any change to hours, address, policies or leadership.

Questions people ask

What is entity SEO?

Optimizing how search engines and AI systems understand your brand as an entity: its attributes, relationships and the sources that describe it.

What is NAP consistency?

Keeping your business name, address and phone number identical across listings. It's part of a wider entity consistency audit.

Why does AI give wrong facts about my company?

Often because third-party sources disagree or are outdated. Fixing those sources is the most reliable correction.

Which sources matter most?

Your own site, Google Business Profile, Wikidata and Wikipedia where applicable, LinkedIn, major directories and review sites in your industry.

Templates that work well with this one

Schema Markup Audit Template
Check presence, syntax, required fields, visible-content match and policy for every structured data type you ship.

Answer Evidence Audit Template
Check every claim for a supporting source, original value, clarity and freshness, so AI answers can quote and cite it.

AI Citation Tracker
Log answers from ChatGPT, Perplexity, Gemini and AI Overviews, and measure your citation rate by platform.

Local Rank Grid Tracker
Log rankings across a geo grid, see a colour heatmap and measure weighted top-3 coverage for any local keyword.

Hreflang Audit Template
Validate every hreflang relationship: alternate status, self-reference, return tags, canonical match and locale codes.

SEO Client Onboarding Checklist
Track every access, definition and baseline export a new SEO engagement needs, with owners and blockers.

Read the full tutorial online: **optimizationtheory.com/download-view/brand-entity-audit-template/**
Get all six templates in the **AI Visibility & GEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

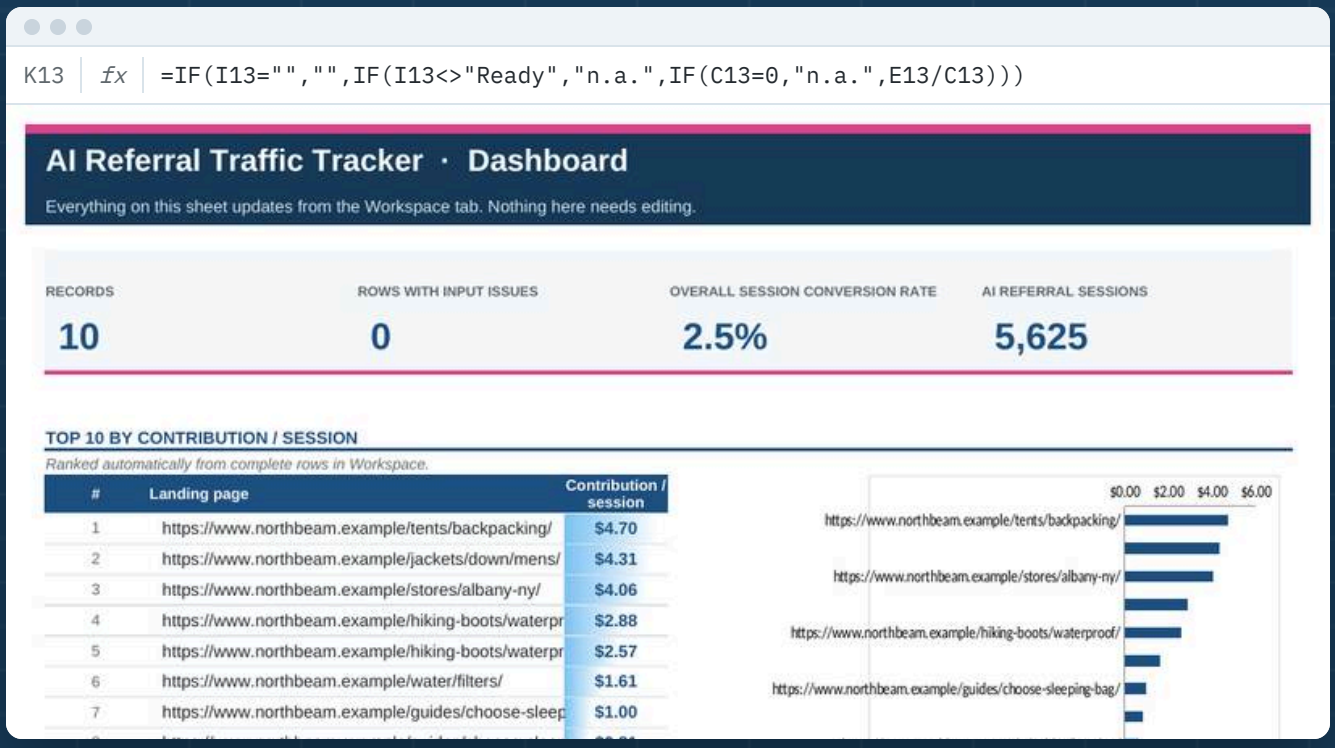
OptimizationTheory.com

AI Visibility & GEO Toolkit, resource 30

AI Referral Traffic Tracker

Measure sessions, conversion rate and contribution per session from ChatGPT, Perplexity, Gemini, Copilot and Claude.

Built for the DataForSEO API: AI Optimization: LLM Mentions



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which AI referral sources and landing pages send visits that convert, and how much contribution each AI session is worth.

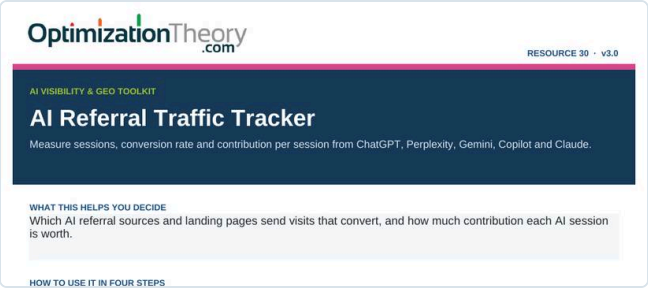
AI citations are visibility. AI referrals are visits. The two are related but not the same, and conflating them is how teams end up celebrating mentions that never send a customer, or ignoring a source that quietly converts better than organic search.

This AI referral traffic tracker records sessions, conversions and contribution by landing page and AI source (chatgpt.com, perplexity.ai, gemini.google.com, copilot.microsoft.com, claude.ai), alongside the observed citation count and attribution model. It calculates conversion rate and contribution per session so you can compare AI sources with each other and with organic.

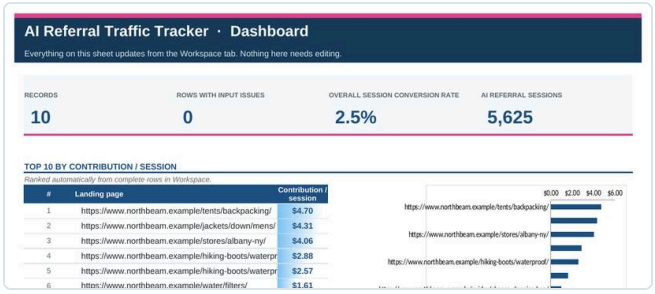
Who it's for

- SEOs and analysts reporting AI search impact
- Ecommerce teams deciding whether GEO is worth investment
- Marketers building AI channel groups in GA4
- Agencies showing clients what AI visibility is worth

What's in the workbook



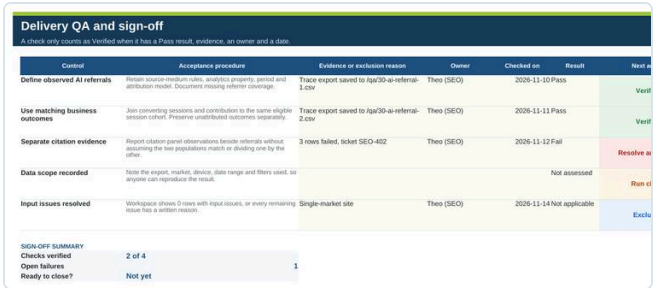
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Session conversion rate = conversions ÷ sessions. Contribution per session = contribution ÷ sessions. Both return n.a. for zero sessions.

The key formula, as written in the workbook

```
=IF(I13="","",IF(I13<>"Ready","n.a.",IF(C13=0,"n.a.",E13/C13)))
```

Result column	Plain-English formula	What it tells you
Session conversion rate	IF(Eligible sessions=0,"n.a.",Converting sessions ÷ Eligible sessions)	Converting sessions / eligible sessions.
Contribution / session	IF(Eligible sessions=0,"n.a.",Attributed contribution ÷ Eligible sessions)	Observed attributed contribution per session.

How to use it, step by step

1

Isolate AI referrals in GA4

Create a custom channel group or exploration filter for AI sources by session source.

2

Export by landing page and source

Pull sessions, key events (conversions) and revenue or contribution for a fixed window.

3

Add citations and attribution model

Note how many citations you observed for that page and which attribution model the numbers use.

4

Compare sources

Read contribution per session on the Dashboard. Invest content effort where AI visits convert.



AI Referral Traffic Tracker

Measure sessions, conversion rate and contribution per session from ChatGPT, Perplexity, Gemini, Copilot and Claude.

OPTIMIZATION THEORY · AI VISIBILITY & GEO TOOLKIT · RESOURCE 30 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	OVERALL SESSION CONVER	AI REFERRAL SESSIONS
10	0	2.5%	5,625

INPUT — Type or paste here

FORMULA — Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS

② AUTOMATIC CHECKS AND RESULTS

Landing page	Source / medium	Eligible sessions	Converting sessions	Attributed contribution	Input check	Session conversion rate	Contribution / session
https://www.northbeam.example/hiking-boots/waterpro	chatgpt.com / referral	1,840	61	$5,290	Ready	3.3%	$2.88
https://www.northbeam.example/guides/choose-sleepir	chatgpt.com / referral	1,210	14	$980	Ready	1.2%	$0.81
https://www.northbeam.example/tents/backpacking/	perplexity.ai / referral	640	26	$3,010	Ready	4.1%	$4.70
https://www.northbeam.example/returns/	chatgpt.com / referral	520	2	$0	Ready	0.4%	$0.00
https://www.northbeam.example/guides/choose-sleepir	perplexity.ai / referral	410	6	$410	Ready	1.5%	$1.00
https://www.northbeam.example/jackets/down/mens/	gemini.google.com / referr	260	9	$1,120	Ready	3.5%	$4.31
https://www.northbeam.example/hiking-boots/waterpro	copilot.microsoft.com / ref	140	4	$360	Ready	2.9%	$2.57
https://www.northbeam.example/stores/albany-ny/	chatgpt.com / referral	330	11	$1,340	Ready	3.3%	$4.06
https://www.northbeam.example/guides/layering/	claude.ai / referral	95	1	$60	Ready	1.1%	$0.63
https://www.northbeam.example/water/filters/	perplexity.ai / referral	180	5	$290	Ready	2.8%	$1.61

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO AI Optimization: LLM Mentions**: AI answers (ChatGPT or Google AI Overviews) that mention a domain or keyword, with their cited sources.

DataForSEO supplies the URL or query list and the audit trail; you add the measurements listed below.

1. Request the data

```
POST https://api.dataforseo.com/v3/ai_optimization/llm_mentions/search_mentions/live
[
  {
    "target": [
      {
        "domain": "yourdomain.com"
      }
    ],
    "platform": "chat_gpt",
    "location_code": 2840,
    "language_code": "en",
    "limit": 100
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 30 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Landing page	Source / medium, Eligible sessions, Converting sessions, Attributed contribution, Observed panel citations, Attribution model

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`landing_page`	Landing page	Normalized GA4 landing page. API citation URLs can enrich the inventory.	DataForSEO: url
`source_medium`	Source / medium	Actual session source/medium under a documented AI-referral grouping.	Your records or manual review
`sessions`	Eligible sessions	GA4 sessions for the declared source group and window.	Your records or manual review
`conversions`	Converting sessions	Distinct sessions meeting the selected conversion condition.	Your records or manual review
`contribution`	Attributed contribution	Contribution profit attributed under the stated analytics model.	Your records or manual review
`observed_citations`	Observed panel citations	Separate citation count for context only. This is not used to attribute sessions.	Your records or manual review
`attribution_model`	Attribution model	Exact reporting model, lookback and grouping definition.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

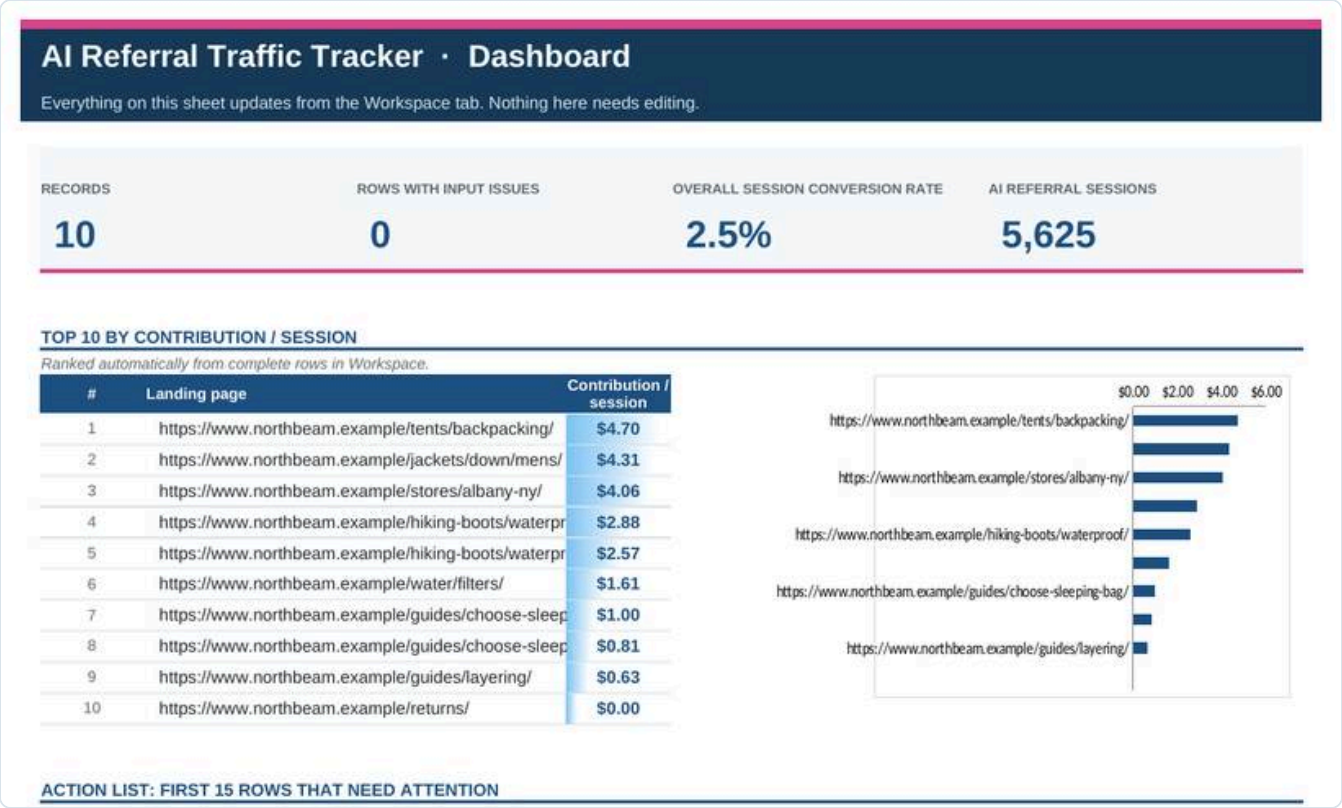
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 10 example rows.

10	0	2.5%	5,625
Records	Rows with input issues	Overall session conversion rate	AI referral sessions

ChatGPT sends the most example sessions, but Perplexity visits to the tents category are worth more per session. The returns page gets AI visits that never convert, which is fine: it's support traffic.

Top 10 by contribution / session

#	Landing page	Contribution / session
1	https://www.northbeam.example/tents/backpacking/	$4.70
2	https://www.northbeam.example/jackets/down/mens/	$4.31
3	https://www.northbeam.example/stores/albany-ny/	$4.06
4	https://www.northbeam.example/hiking-boots/waterproof/	$2.88
5	https://www.northbeam.example/hiking-boots/waterproof/	$2.57



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Measured referral traffic is only the trackable part of AI discovery. Direct visits and cross-device behavior may not preserve a referrer.

Limits. DataForSEO cannot supply private GA4 sessions or conversions. Citation presence does not identify the source of a particular visit.

Mistakes to avoid

Missing AI traffic hidden in direct. Some AI apps don't pass referrers. Treat these numbers as a floor.

Mixing attribution models. Record the model so you don't compare last-click with data-driven numbers.

Expecting citations to equal visits. Many AI answers satisfy the user without a click. Track both.

Tips from the field

Set up the AI channel group from the GA4 power user series.

Pair with the citation tracker to see which cited pages send visits.

Compare AI contribution per session with organic search to size the channel.

Questions people ask

How do I track ChatGPT traffic in GA4?

Filter sessions by source (chatgpt.com and similar), or create a custom channel group for AI assistants, then report sessions and conversions by landing page.

Is AI referral traffic growing?

For many sites it's growing quickly from a small base. Track it monthly by source.

Why do AI referrals show up as direct?

Some apps and browsers strip the referrer. That traffic lands in direct, so measured AI traffic is a minimum.

Does AI traffic convert well?

It varies by site and source. Many sites see strong conversion from AI referrals because users arrive further along in their research.

Templates that work well with this one

AI Citation Tracker

Log answers from ChatGPT, Perplexity, Gemini and AI Overviews, and measure your citation rate by platform.

SEO ROI Calculator

Turn incremental sessions into revenue, contribution, net return and a break-even month against real SEO costs.

AI Share of Voice Calculator

Compare citation rate and share across competitor domains inside one fixed set of AI answers.

SEO Forecast Template

Project added clicks and contribution per keyword cluster with CTR, attainment and seasonality you can defend.

AI Prompt Research Template

Turn real customer tasks and keywords into a weighted prompt panel for ChatGPT, Perplexity, Gemini and AI Overviews.

Answer Evidence Audit Template

Check every claim for a supporting source, original value, clarity and freshness, so AI answers can quote and cite it.

Read the full tutorial online: **optimizationtheory.com/download-view/ai-referral-traffic-tracker/**
Get all six templates in the **AI Visibility & GEO Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

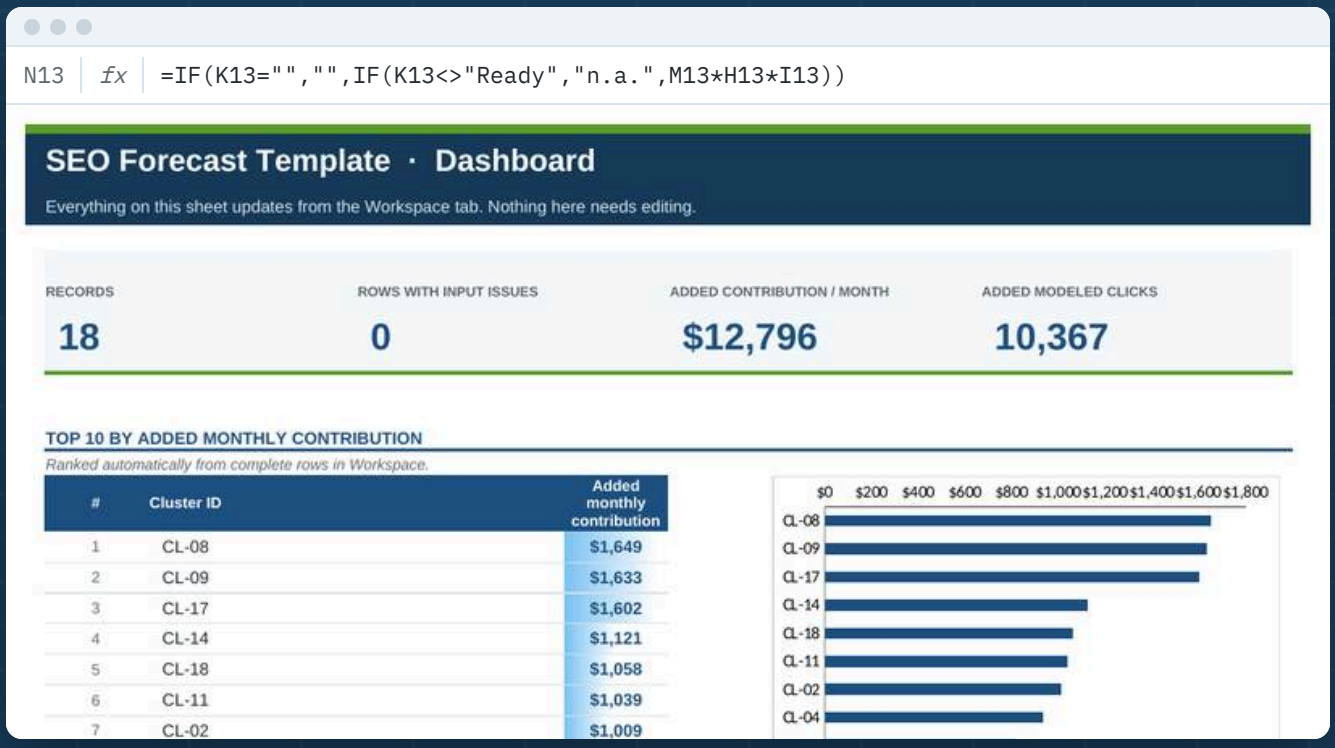
OptimizationTheory.com

SEO Business & Delivery Toolkit, resource 31

SEO Forecast Template

Project added clicks and contribution per keyword cluster with CTR, attainment and seasonality you can defend.

Built for the DataForSEO API: Labs: Keyword Overview



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

How much additional traffic and monthly contribution a portfolio of keyword clusters could add, with every assumption visible.

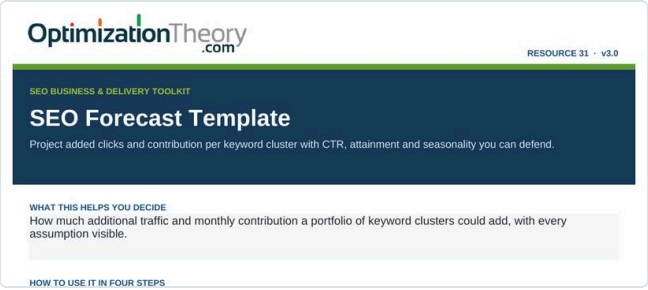
SEO forecasts fail in two ways: they're so optimistic nobody believes them, or so vague nobody can act on them. A good forecast states its assumptions plainly so stakeholders can argue with the inputs instead of the conclusion.

This SEO forecast template models each keyword cluster (one row per cluster, deduplicated so traffic isn't counted twice) from search volume, baseline CTR, target CTR, an attainment factor, seasonality, conversion rate and value per conversion. It calculates baseline modeled clicks, added clicks and added monthly contribution, and ranks clusters by the value they add.

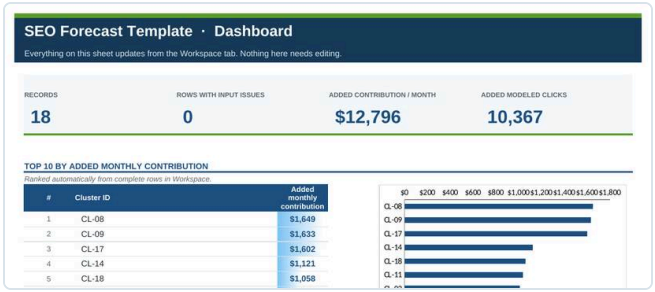
Who it's for

- SEO leads building a business case or budget request
- Agencies scoping retainers and setting expectations
- Finance and leadership teams evaluating SEO investment
- In-house teams setting quarterly targets

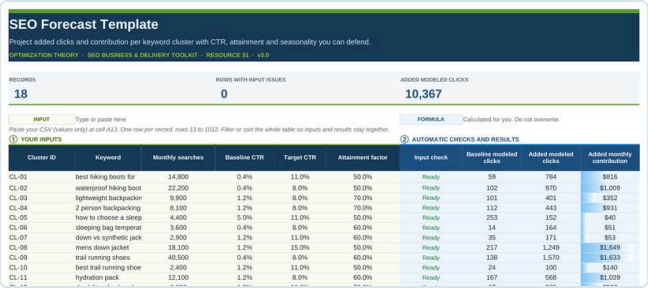
What's in the workbook



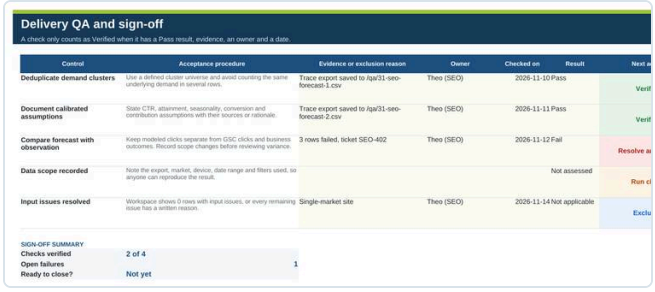
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 1,000 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Baseline clicks = volume × baseline CTR × seasonality. Added clicks = volume × (target CTR – baseline CTR, min 0) × seasonality × attainment. Added contribution = added clicks × conversion rate × value per conversion.

The key formula, as written in the workbook

```
=IF(K13="","",IF(K13<>"Ready","n.a.",M13*H13*I13))
```

Result column	Plain-English formula	What it tells you
Baseline modeled clicks	Monthly searches × Baseline CTR × Seasonal multiplier	Modeled baseline for the selected month.
Added modeled clicks	Monthly searches × MAX(0,Target CTR-Baseline CTR) × Seasonal multiplier × Attainment factor	Incremental opportunity after seasonal and attainment factors.
Added monthly contribution	Added modeled clicks × Conversion rate × Value per conversion	Forecast contribution based on the input conversion economics.

How to use it, step by step

1

Deduplicate into clusters

One row per cluster, using the primary keyword's volume or the cluster's combined volume, never both.

2

Set baseline and target CTR

Baseline from Search Console; target for the position you can credibly reach.

3

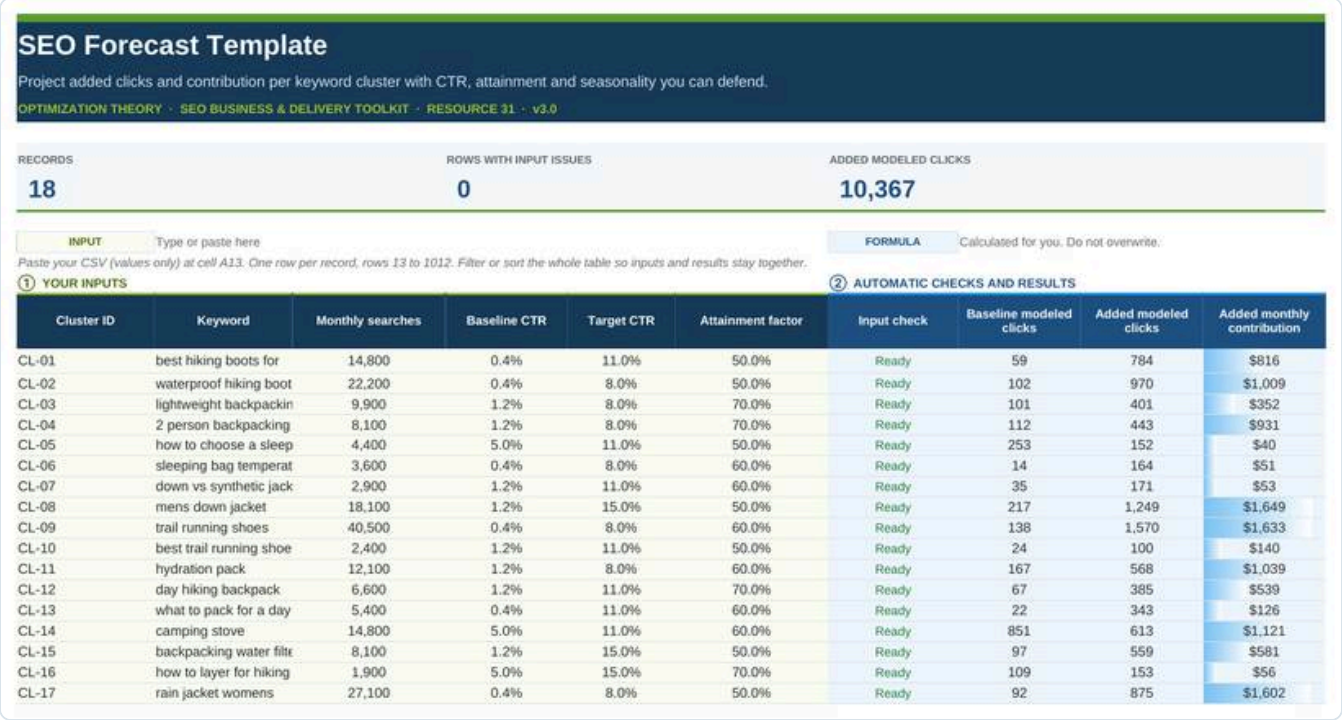
Apply attainment and seasonality

Attainment discounts the gain (0.5 to 0.7 is sensible). Seasonality scales a specific month (1.0 = average).

4

Present ranges, not points

Copy the sheet for conservative and stretch scenarios by changing attainment and target CTR.



SEO Forecast Template

Project added clicks and contribution per keyword cluster with CTR, attainment and seasonality you can defend.

OPTIMIZATION THEORY · SEO BUSINESS & DELIVERY TOOLKIT · RESOURCE 31 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	ADDED MODELED CLICKS
18	0	10,367

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 1012. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Cluster ID	Keyword	Monthly searches	Baseline CTR	Target CTR	Attainment factor	Input check	Baseline modeled clicks	Added modeled clicks	Added monthly contribution
CL-01	best hiking boots for	14,800	0.4%	11.0%	50.0%	Ready	59	784	$816
CL-02	waterproof hiking boot	22,200	0.4%	8.0%	50.0%	Ready	102	970	$1,009
CL-03	lightweight backpackin	9,900	1.2%	8.0%	70.0%	Ready	101	401	$352
CL-04	2 person backpacking	8,100	1.2%	8.0%	70.0%	Ready	112	443	$931
CL-05	how to choose a sleep	4,400	5.0%	11.0%	50.0%	Ready	253	152	$40
CL-06	sleeping bag temperat	3,600	0.4%	8.0%	60.0%	Ready	14	164	$51
CL-07	down vs synthetic jack	2,900	1.2%	11.0%	60.0%	Ready	35	171	$53
CL-08	mens down jacket	18,100	1.2%	15.0%	50.0%	Ready	217	1,249	$1,649
CL-09	trail running shoes	40,500	0.4%	8.0%	60.0%	Ready	138	1,570	$1,633
CL-10	best trail running shoe	2,400	1.2%	11.0%	50.0%	Ready	24	100	$140
CL-11	hydration pack	12,100	1.2%	8.0%	60.0%	Ready	167	568	$1,039
CL-12	day hiking backpack	6,600	1.2%	11.0%	70.0%	Ready	67	385	$539
CL-13	what to pack for a day	5,400	0.4%	11.0%	60.0%	Ready	22	343	$126
CL-14	camping stove	14,800	5.0%	11.0%	60.0%	Ready	851	613	$1,121
CL-15	backpacking water filte	8,100	1.2%	15.0%	50.0%	Ready	97	559	$581
CL-16	how to layer for hiking	1,900	5.0%	15.0%	70.0%	Ready	109	153	$56
CL-17	rain jacket womens	27,100	0.4%	8.0%	50.0%	Ready	92	875	$1,602

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Keyword Overview**: search volume, monthly history, difficulty and intent for a list of keywords.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/keyword_overview/live
[
  {
    "keywords": [
      "your keyword 1",
      "your keyword 2"
    ],
    "location_code": 2840,
    "language_code": "en"
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 31 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Keyword, Monthly searches	Cluster ID, Baseline CTR, Target CTR, Attainment factor, Seasonal multiplier, Conversion rate, Value per conversion

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`cluster_id`	Cluster ID	Unique nonoverlapping demand cluster. Do not repeat the same intent family.	Your records or manual review
`keyword`	Keyword	Exact query in the selected country and language.	DataForSEO: keyword
`search_volume`	Monthly searches	Provider monthly search-volume estimate. Use one market, language and source date.	DataForSEO: search_volume
`baseline_ctr`	Baseline CTR	Assumed organic click-through rate as a decimal. Calibrate by device, brand and SERP layout. Decimal, 0.08 = 8%.	Your records or manual review
`target_ctr`	Target CTR	Assumed organic click-through rate as a decimal. Calibrate by device, brand and SERP layout. Decimal, 0.08 = 8%.	Your records or manual review
`attainment`	Attainment factor	Planning haircut for partial target attainment. Decimal, 0.08 = 8%.	Your records or manual review
`seasonality`	Seasonal multiplier	Demand relative to an average month. 1 means average.	Your records or manual review
`conversion_rate`	Conversion rate	Conversions divided by eligible organic sessions for the same segment. This is an assumption. Decimal, 0.08 = 8%.	Your records or manual review
`value_per_conversion`	Value per conversion	USD contribution profit per conversion or expected lead profit. Use one value basis.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

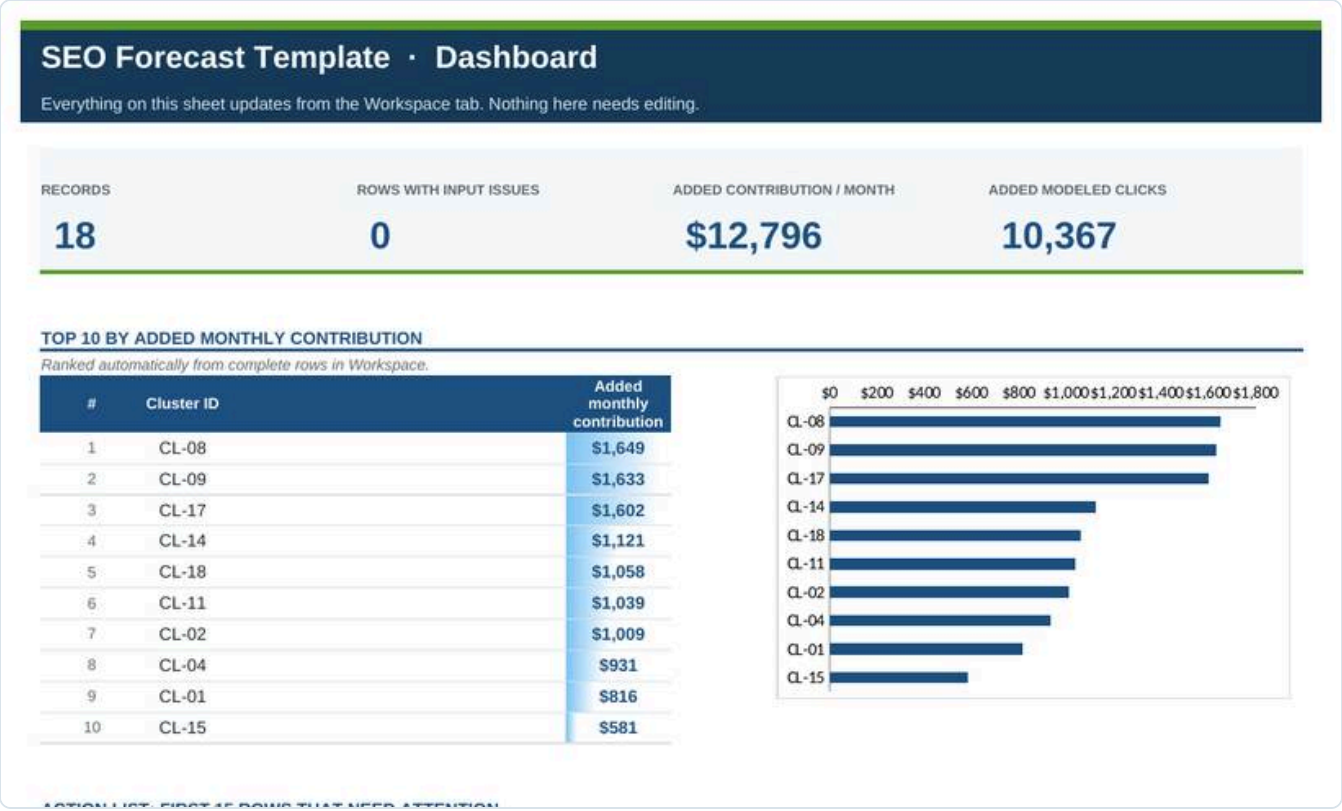
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 18 example rows.

18	0	$12,796	10,367
Records	Rows with input issues	Added contribution / month	Added modeled clicks

The example portfolio adds roughly 10,400 modeled clicks and $12,800 in monthly contribution, led by the men's down jacket, trail running shoe and women's rain jacket clusters.

Top 10 by added monthly contribution

#	Cluster ID	Added monthly contribution
1	CL-08	$1,649
2	CL-09	$1,633
3	CL-17	$1,602
4	CL-14	$1,121
5	CL-18	$1,058



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

A forecast is conditional on the entered assumptions. Use it to discuss a range by changing and saving a clearly labeled planning case.

Limits. Do not add secondary keywords from the same cluster as independent demand. This is a one-month steady-state opportunity, not a timing model.

Mistakes to avoid

Forecasting from rankings alone. Rankings don't pay bills. Carry the forecast through to conversions and contribution.

Double counting keyword variants. If ten variants share one page, forecast the cluster once.

Presenting one number. Show a range with stated assumptions; it's more honest and more persuasive.

Tips from the field

Use the seasonality planner's index for the seasonality column.

Compare forecast to actuals monthly in the SEO ROI calculator.

Feed winning clusters into the 90-day roadmap.

Questions people ask

How do you forecast SEO traffic?

Estimate the CTR you can achieve for each keyword cluster, multiply by search volume and an attainment factor, adjust for seasonality, then convert to conversions and value.

How accurate are SEO forecasts?

They're planning estimates, not promises. Accuracy improves with your own CTR data, conservative attainment and regular comparison to actuals.

What's an attainment factor?

A discount for how much of the modeled gain you expect to actually capture, accounting for competition, execution and time.

Can I forecast revenue with this template?

Yes. Use value per conversion as contribution (margin) for profit, or average order value for revenue.

Templates that work well with this one

SEO ROI Calculator

Turn incremental sessions into revenue, contribution, net return and a break-even month against real SEO costs.

Keyword Prioritization Template

Rank every keyword by the profit it could add per hour of work, not by search volume alone.

Search Seasonality Planner

Turn monthly search volume into a seasonal index, season-adjusted click targets and a publish-by month.

SEO Roadmap Template

Sequence 90 days of SEO and GEO work by weighted opportunity per hour, dependencies and acceptance criteria.

Ecommerce SEO Prioritization Template

Rank product pages by potential orders, unit contribution and profit per hour, and catch out-of-stock or noindex SKUs.

SEO Split Test Calculator

Estimate ratio-adjusted lift and difference-in-differences against matched control pages, with a pre-trend check.

Read the full tutorial online: **optimizationtheory.com/download-view/seo-forecast-template/**
Get all six templates in the **SEO Business & Delivery Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

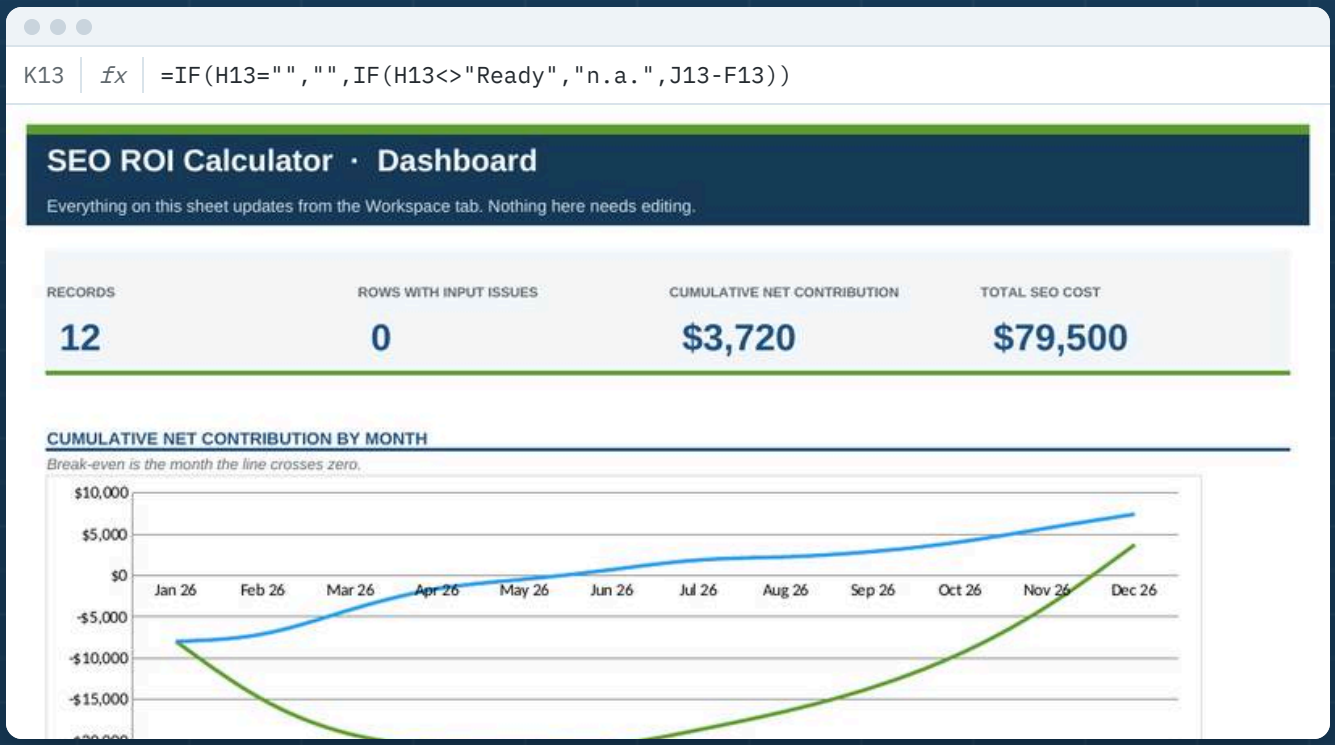
OptimizationTheory.com

SEO Business & Delivery Toolkit, resource 32

SEO ROI Calculator

Turn incremental sessions into revenue, contribution, net return and a break-even month against real SEO costs.

Built for the DataForSEO API: Labs: Ranked Keywords



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Whether SEO is paying back, by month and cumulatively, after real costs, and when it broke even.

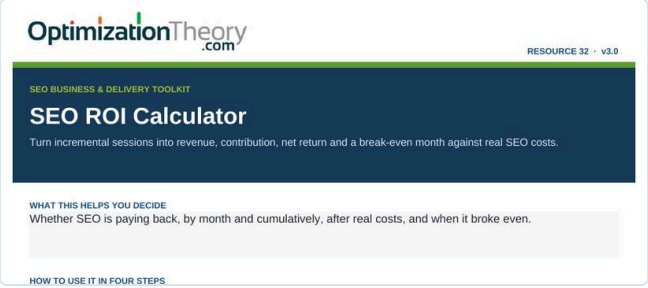
'What's the ROI of SEO?' is usually answered with traffic charts. Traffic isn't return. Return is incremental contribution minus what you spent to earn it, and SEO's shape matters: costs come first, gains compound later.

This SEO ROI calculator records incremental sessions, conversion rate, average order value, contribution margin and SEO cost for each month. It calculates incremental revenue, contribution, net after cost, monthly ROI and a cumulative net line that shows the break-even month on the Dashboard chart.

Who it's for

- SEO leads reporting to finance or leadership
- Agencies proving the value of a retainer
- Founders deciding whether to keep investing in SEO
- Analysts comparing channels on contribution

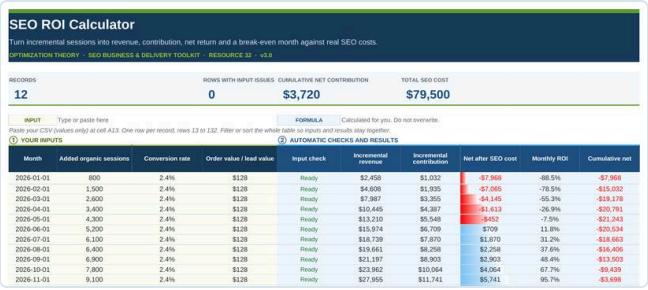
What's in the workbook



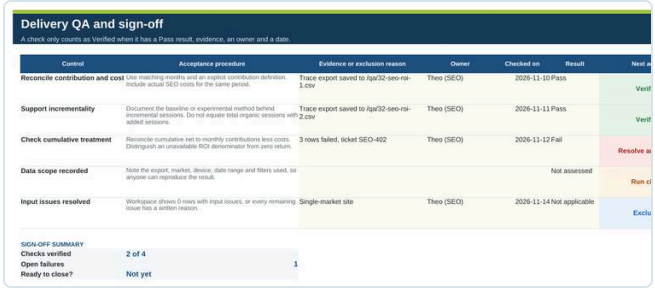
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 120 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Revenue = sessions × conversion rate × AOV. Contribution = revenue × margin. Net = contribution – SEO cost. Monthly ROI = net ÷ cost. Cumulative net is the running total of net.

The key formula, as written in the workbook

```
=IF(H13="","",IF(H13<>"Ready","n.a.",J13-F13))
```

Result column	Plain-English formula	What it tells you
Incremental revenue	Added organic sessions × Conversion rate × Order value ÷ lead value	Modeled incremental revenue.
Incremental contribution	Incremental revenue × Contribution margin	Revenue after the stated variable-cost margin.
Net after SEO cost	Incremental contribution-SEO cost	Contribution minus monthly SEO cost.
Monthly ROI	IF(SEO cost=0,"n.a.",Net after SEO cost ÷ SEO cost)	Net contribution divided by SEO cost.
Cumulative net	SUM(running total of Net after SEO cost)	Running contribution net of costs in the displayed chronological row order.

How to use it, step by step

1

Estimate incremental sessions

Sessions above a baseline or control, not total organic sessions.

2

Add conversion and value

Use organic conversion rate, average order value and your contribution margin.

3

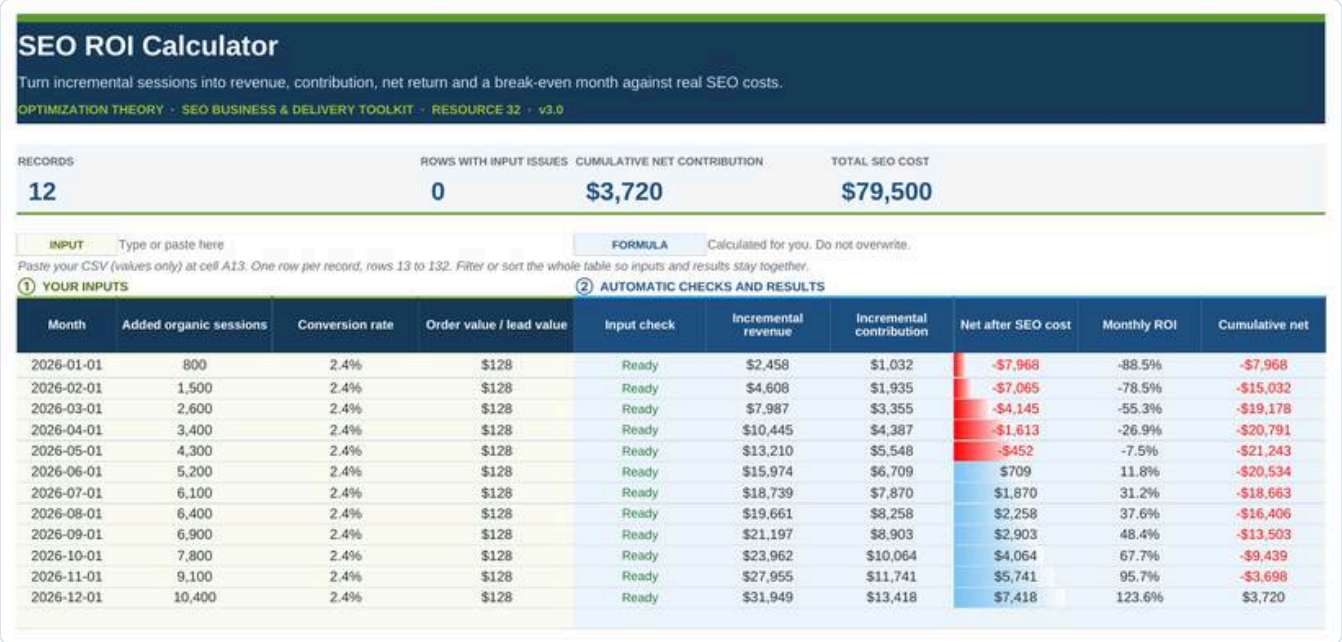
Enter real costs

Retainer, salaries share, content, tools and dev time spent on SEO, per month.

4

Read the cumulative line

The chart shows when cumulative net crosses zero: your payback month.



SEO ROI Calculator

Turn incremental sessions into revenue, contribution, net return and a break-even month against real SEO costs.

OPTIMIZATION THEORY · SEO BUSINESS & DELIVERY TOOLKIT · RESOURCE 32 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	CUMULATIVE NET CONTRIBUTION	TOTAL SEO COST
12	0	$3,720	$79,500

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 132. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Month	Added organic sessions	Conversion rate	Order value / lead value	Input check	Incremental revenue	Incremental contribution	Net after SEO cost	Monthly ROI	Cumulative net
2026-01-01	800	2.4%	$128	Ready	$2,458	$1,032	-$7,968	-88.5%	-$7,968
2026-02-01	1,500	2.4%	$128	Ready	$4,608	$1,935	-$7,065	-78.5%	-$15,032
2026-03-01	2,600	2.4%	$128	Ready	$7,987	$3,355	-$4,145	-55.3%	-$19,178
2026-04-01	3,400	2.4%	$128	Ready	$10,445	$4,387	-$1,613	-26.9%	-$20,791
2026-05-01	4,300	2.4%	$128	Ready	$13,210	$5,548	-$452	-7.5%	-$21,243
2026-06-01	5,200	2.4%	$128	Ready	$15,974	$6,709	$709	11.8%	-$20,534
2026-07-01	6,100	2.4%	$128	Ready	$18,739	$7,870	$1,870	31.2%	-$18,663
2026-08-01	6,400	2.4%	$128	Ready	$19,661	$8,258	$2,258	37.6%	-$16,406
2026-09-01	6,900	2.4%	$128	Ready	$21,197	$8,903	$2,903	48.4%	-$13,503
2026-10-01	7,800	2.4%	$128	Ready	$23,962	$10,064	$4,064	67.7%	-$9,439
2026-11-01	9,100	2.4%	$128	Ready	$27,955	$11,741	$5,741	95.7%	-$3,698
2026-12-01	10,400	2.4%	$128	Ready	$31,949	$13,418	$7,418	123.6%	$3,720

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Ranked Keywords**: every keyword a domain ranks for, with its ranking URL, position and volume.

DataForSEO supplies the URL or query list and the audit trail; you add the measurements listed below.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/ranked_keywords/live
[
  {
    "target": "yourdomain.com",
    "location_code": 2840,
    "language_code": "en",
    "limit": 1000
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 32 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Source reference (audit trail)	Month, Added organic sessions, Conversion rate, Order value / lead value, Contribution margin, SEO cost

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`month`	Month	First day of the reporting month. Keep rows chronological.	Your records or manual review
`incremental_sessions`	Added organic sessions	Incremental sessions under your documented baseline model.	Your records or manual review
`conversion_rate`	Conversion rate	Conversions divided by eligible organic sessions for the same segment. This is an assumption. Decimal, 0.08 = 8%.	Your records or manual review
`average_order_value`	Order value / lead value	USD revenue per order or expected revenue per lead.	Your records or manual review
`contribution_margin`	Contribution margin	Revenue share remaining after variable fulfillment and selling costs. Decimal, 0.08 = 8%.	Your records or manual review
`seo_cost`	SEO cost	Monthly agency, labor, tools and allocated production cost in USD.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 12 example rows.

12	0	$3,720	$79,500
Records	Rows with input issues	Cumulative net contribution	Total SEO cost

The example program loses money every month until June, and the cumulative line only crosses zero in December. That J-curve is normal for SEO, and the chart makes it impossible to miss.

Top 10 by net after SEO cost

#	Month	Net after SEO cost
1	Dec 2026	$7,418
2	Nov 2026	$5,741
3	Oct 2026	$4,064
4	Sep 2026	$2,903
5	Aug 2026	$2,258



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Revenue ROI overstates the return when variable costs are material. Use contribution for the investment comparison.

Limits. Private outcomes come from analytics and finance. Ranked-keyword data is supporting visibility evidence, not incremental sessions.

Mistakes to avoid

Counting all organic traffic as incremental. Use the lift over a baseline, or your ROI is wildly overstated.

Using revenue instead of contribution. ROI on revenue ignores product costs. Use margin.

Judging SEO on month-one ROI. SEO front-loads cost. Judge on the cumulative line over 12 months or more.

Tips from the field

Use the SEO split test calculator or post-migration monitor to estimate incremental sessions credibly.

Compare against the forecast template to calibrate future forecasts.

Report cumulative net to leadership; it tells the whole story in one line.

Questions people ask

How do you calculate SEO ROI?

(Incremental contribution from organic search – SEO cost) ÷ SEO cost. Contribution is revenue multiplied by your margin.

What is a good ROI for SEO?

It depends on margins and time frame. Many programs are negative early and strongly positive after 12 to 24 months.

How long does SEO take to pay back?

Often six to twelve months, longer in competitive markets. The cumulative chart shows your actual payback month.

What costs should I include?

Everything spent on SEO: agency or consultant fees, staff time, content, tools and development work.

Templates that work well with this one

SEO Forecast Template

Project added clicks and contribution per keyword cluster with CTR, attainment and seasonality you can defend.

SEO Split Test Calculator

Estimate ratio-adjusted lift and difference-in-differences against matched control pages, with a pre-trend check.

AI Referral Traffic Tracker

Measure sessions, conversion rate and contribution per session from ChatGPT, Perplexity, Gemini, Copilot and Claude.

SEO Roadmap Template

Sequence 90 days of SEO and GEO work by weighted opportunity per hour, dependencies and acceptance criteria.

Post-Migration SEO Monitoring Template

Compare each migrated segment with an untouched control so you can tell real migration loss from seasonality.

Ecommerce SEO Prioritization Template

Rank product pages by potential orders, unit contribution and profit per hour, and catch out-of-stock or noindex SKUs.

Read the full tutorial online: **optimizationtheory.com/download-view/seo-roi-calculator/**
Get all six templates in the **SEO Business & Delivery Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

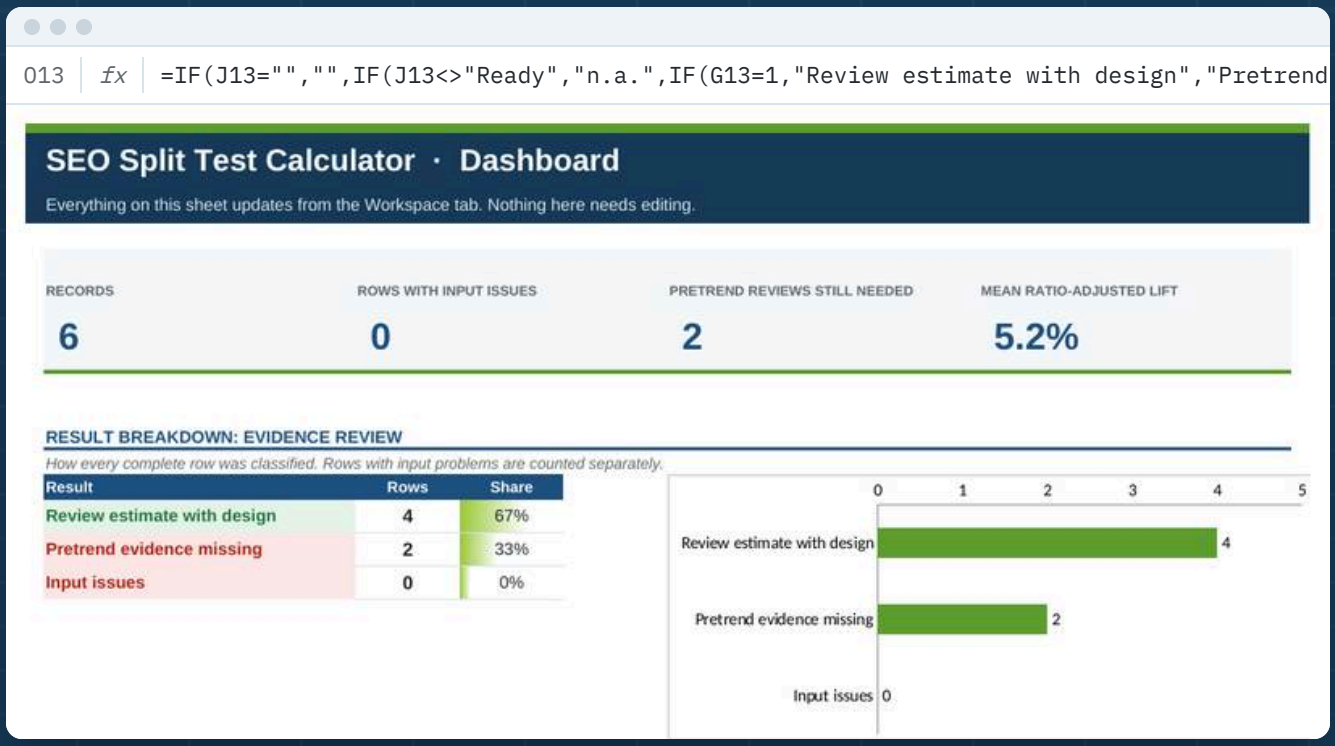
OptimizationTheory.com

SEO Business & Delivery Toolkit, resource 33

SEO Split Test Calculator

Estimate ratio-adjusted lift and difference-in-differences against matched control pages, with a pre-trend check.

Built for the DataForSEO API: Labs: Ranked Keywords



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Whether an SEO change moved traffic on treated pages relative to matched control pages, and whether the evidence supports reading the estimate.

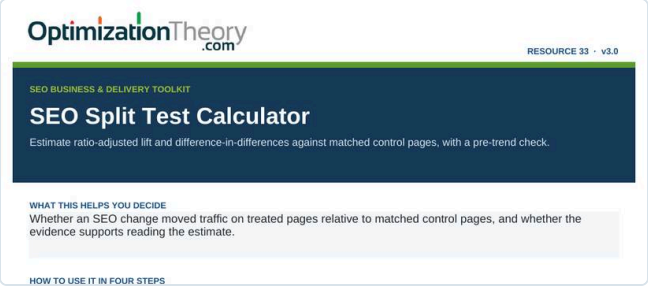
SEO changes don't happen in a vacuum. Between before and after, Google updates, seasons turn and competitors publish. The only fair way to estimate a change's impact is against pages that didn't get the change but would have moved the same way otherwise.

This SEO split testing template compares treatment and control groups before and after a change. It calculates each group's change, a ratio-adjusted lift and an additive difference-in-differences estimate, and only marks an experiment Review estimate with design when you've confirmed the groups trended in parallel beforehand.

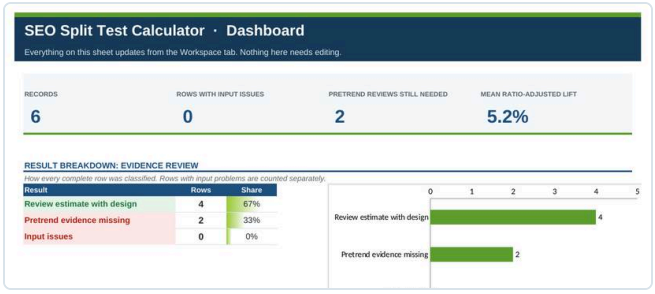
Who it's for

- SEOs running template or sitewide experiments
- Ecommerce teams testing category or product page changes
- Analysts who need defensible test reporting
- Teams without an SEO testing platform

What's in the workbook



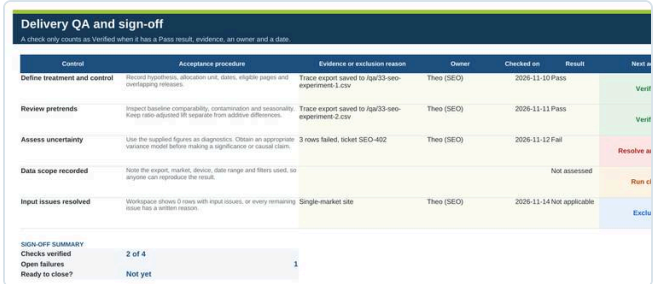
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Treatment change = after ÷ before – 1, same for control. Ratio-adjusted lift = (T after ÷ T before) ÷ (C after ÷ C before) – 1. Difference-in-differences = (T after – T before) – (C after – C before).

The key formula, as written in the workbook

```
=IF(J13="","",IF(J13<>"Ready","n.a.",IF(G13=1,"Review estimate with design","Pretrend evidence missing")))
```

Result column	Plain-English formula	What it tells you
Treatment change	Treatment after ÷ Treatment before-1	Relative change in the treatment group.
Control change	Control after ÷ Control before-1	Relative change in the control group.
Ratio-adjusted lift	(Treatment after ÷ Treatment before) ÷ (Control after ÷ Control before)-1	Treatment ratio divided by control ratio, minus one.
Additive difference-in-differences	(Treatment after-Treatment before)-(Control after-Control before)	Additive normalized outcome change net of control change.
Evidence review	IF(Pretrend reviewed=1,"Review estimate with design","Pretrend evidence missing")	Study-design reminder. No statistical significance is inferred.

The results you'll see

Review estimate with design Pretrend evidence missing

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Split comparable pages

Randomly assign similar pages to treatment and control. Hundreds of pages per group is ideal.

2

Check the pre-period

Chart both groups for 6 to 8 weeks before the change. Mark parallel trends = 1 only if they moved together.

3

Ship the change to treatment only

Leave control untouched for the test window.

4

Read lift with the design in mind

Report the ratio-adjusted lift, note the evidence, and don't over-read small effects.



SEO Split Test Calculator

Estimate ratio-adjusted lift and difference-in-differences against matched control pages, with a pre-trend check.

OPTIMIZATION THEORY · SEO BUSINESS & DELIVERY TOOLKIT · RESOURCE 33 · v3.0

RECORDS 6

MEAN RATIO-ADJUSTED LIFT 5.2%

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS ② AUTOMATIC CHECKS AND RESULTS

Experiment ID	Treatment before	Treatment after	Input check	Treatment change	Control change	Ratio-adjusted lift	Additive difference-in-differences	Evidence review
EXP-01	42,100	47,900	Ready	13.8%	1.8%	11.8%	510000.0%	Review estimate with design
EXP-02	18,200	18,900	Ready	3.8%	4.0%	-0.1%	0.0%	Review estimate with design
EXP-03	9,100	10,800	Ready	18.7%	3.1%	15.2%	140000.0%	Pretrend evidence missing
EXP-04	26,400	24,800	Ready	-6.1%	2.0%	-7.9%	-210000.0%	Review estimate with design
EXP-05	12,000	13,900	Ready	15.8%	-1.6%	17.7%	210000.0%	Review estimate with design
EXP-06	7,300	7,400	Ready	1.4%	7.0%	-5.3%	-40000.0%	Pretrend evidence missing

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Ranked Keywords**: every keyword a domain ranks for, with its ranking URL, position and volume.

DataForSEO supplies the URL or query list and the audit trail; you add the measurements listed below.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/ranked_keywords/live
[
  {
    "target": "yourdomain.com",
    "location_code": 2840,
    "language_code": "en",
    "limit": 1000
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 33 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Source reference (audit trail)	Experiment ID, Treatment before, Treatment after, Control before, Control after, Hypothesis, Pretrend reviewed, Evidence

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`experiment_id`	Experiment ID	One hypothesis, treatment definition and fixed analysis window.	Your records or manual review
`treatment_before`	Treatment before	Clicks per URL per day, or another fixed normalized metric, before release.	Your records or manual review
`treatment_after`	Treatment after	Same normalized measure after release.	Your records or manual review
`control_before`	Control before	Same normalized measure for the matched control before release.	Your records or manual review
`control_after`	Control after	Same normalized measure for the matched control after release.	Your records or manual review
`hypothesis`	Hypothesis	Specific change and predicted mechanism.	Your records or manual review
`parallel_trends`	Pretrend reviewed	1 after checking whether pre-release trajectories are plausibly comparable. 1 = Yes, 0 = No.	Your records or manual review
`evidence`	Evidence	Link to a dated crawl, screenshot, ticket or source that another reviewer can inspect.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

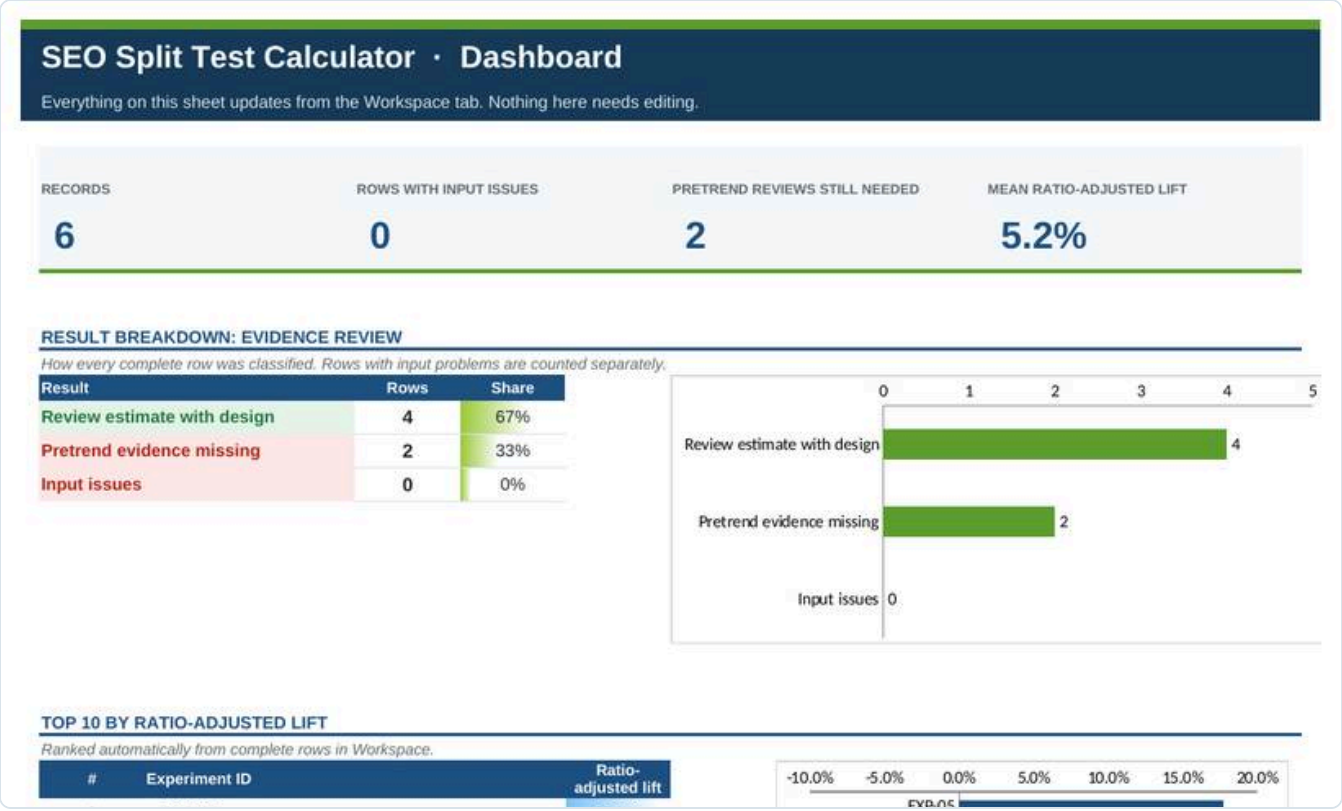
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 6 example rows.

6	0	2	5.2%
Records	Rows with input issues	Pretrend reviews still needed	Mean ratio-adjusted lift

The comparison-table experiment shows a solid lift with a checked pre-trend. Two experiments are flagged because no pre-period evidence was recorded, so their estimates shouldn't be reported yet.

Top 10 by ratio-adjusted lift

#	Experiment ID	Ratio-adjusted lift
1	EXP-05	17.7%
2	EXP-03	15.2%
3	EXP-01	11.8%
4	EXP-02	-0.1%
5	EXP-06	-5.3%



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

A positive estimate needs a credible control and enough stable observations. The workbook does not estimate a p-value.

Limits. Seasonality, spillovers and cohort changes can invalidate interpretation. Keywords and ranks help explain the result but do not establish causality.

Mistakes to avoid

Choosing control pages by hand. Hand-picked controls bias results. Randomize.

Skipping the pre-trend check. If the groups were already diverging, the estimate is meaningless.

Changing control pages mid-test. Any change to control contaminates the comparison.

Tips from the field

Use the title CTR test for snippet-only experiments.

Run tests long enough to cover weekly cycles, usually four weeks minimum.

Log every experiment here, including the ones that didn't work.

Questions people ask

What is SEO split testing?

Applying a change to a random group of similar pages and comparing their organic performance with an unchanged control group.

What is difference-in-differences?

A method that estimates impact as the change in the treatment group minus the change in the control group over the same period.

How many pages do I need for an SEO test?

Enough that random noise averages out, typically hundreds of pages with steady traffic per group.

Can I A/B test SEO on one page?

Not as a controlled test. Use before-and-after comparisons and label them descriptive.

Templates that work well with this one

Title Tag CTR Test Calculator

Compare two CTRs with a 95% interval and plain-English verdicts, so you don't ship a title change that was just noise.

Post-Migration SEO Monitoring Template

Compare each migrated segment with an untouched control so you can tell real migration loss from seasonality.

SEO ROI Calculator

Turn incremental sessions into revenue, contribution, net return and a break-even month against real SEO costs.

SEO Forecast Template

Project added clicks and contribution per keyword cluster with CTR, attainment and seasonality you can defend.

Content Decay Analysis Template

Separate lost impressions, lower CTR and falling demand, so you refresh the pages that really decayed.

SEO Roadmap Template

Sequence 90 days of SEO and GEO work by weighted opportunity per hour, dependencies and acceptance criteria.

Read the full tutorial online: **optimizationtheory.com/download-view/seo-split-test-calculator/**
Get all six templates in the **SEO Business & Delivery Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

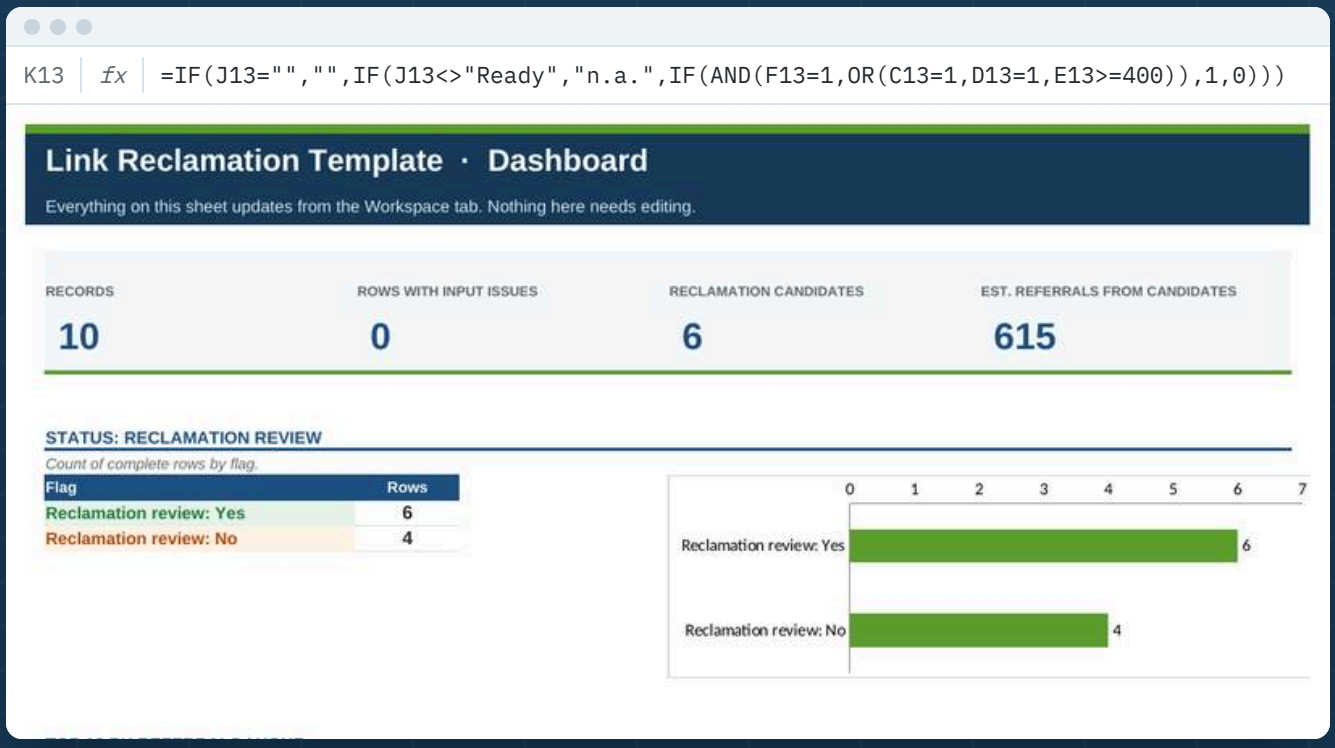
OptimizationTheory.com

SEO Business & Delivery Toolkit, resource 34

Link Reclamation Template

Find lost and broken backlinks worth fixing and rank them by expected referrals per hour of outreach.

Built for the DataForSEO API: Backlinks API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which lost or broken backlinks are worth reclaiming, and which to tackle first by expected referrals per hour.

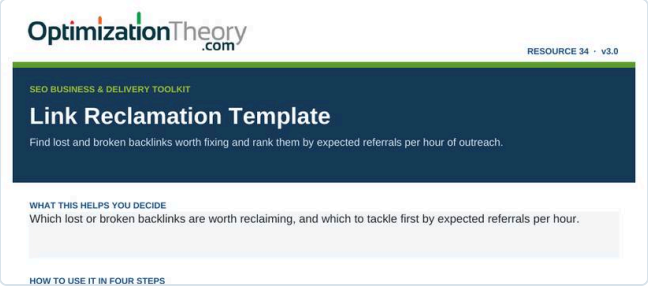
The easiest links to build are the ones you already earned. Backlinks break when you change URLs, delete pages or migrate, and they get lost when publishers update articles. Reclaiming them is usually faster than earning new ones.

This link reclamation template records each linking page, its target on your site, whether the link is lost or broken, the target's status, whether the link is relevant, estimated referrals and effort. Relevant links that are lost, broken or pointing at an error page become reclamation candidates, ranked by referrals per hour.

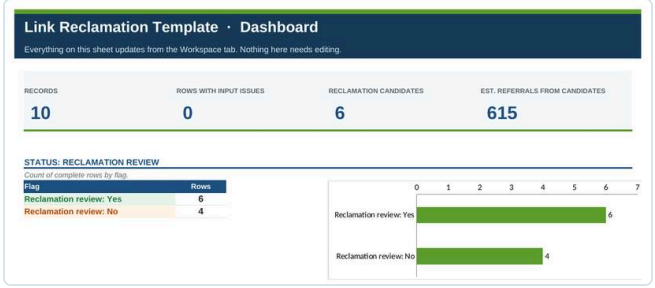
Who it's for

- SEOs running link building or digital PR
- Teams cleaning up after a migration or URL change
- Ecommerce sites with discontinued product URLs
- Agencies looking for quick link wins

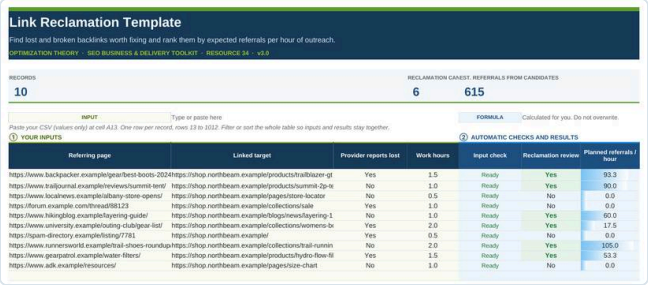
What's in the workbook



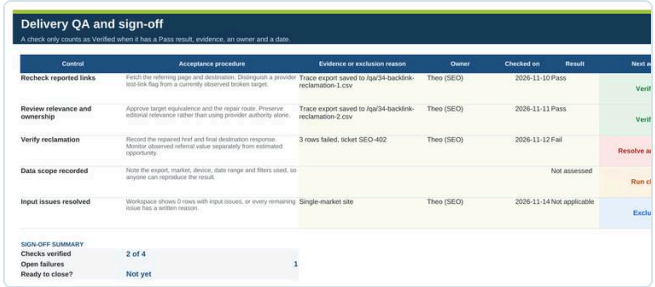
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 1,000 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Reclamation candidate = 1 when the link is relevant and lost, broken, or points at a target returning 400 or above. Referrals per hour = estimated referrals ÷ effort for candidates, otherwise 0.

The key formula, as written in the workbook

```
=IF(J13="","",IF(J13<>"Ready","n.a.",IF(AND(F13=1,OR(C13=1,D13=1,E13>=400)),1,0)))
```

Result column	Plain-English formula	What it tells you
Reclamation review	IF(AND(Human relevance verified=1,OR(Provider reports lost=1,Provider reports broken=1,Target HTTP status ≥ 400)),1,0)	Flags relevant relationships needing a manual repair review.
Planned referrals / hour	IF(Reclamation review=1,Expected referrals ÷ month ÷ Work hours,0)	Expected referral opportunity per repair hour.

How to use it, step by step

1

Export lost and broken links

From your backlink tool, export lost links and links pointing at 4xx or 5xx URLs on your site.

2

Check the target status

Record the current status of each target URL.

3

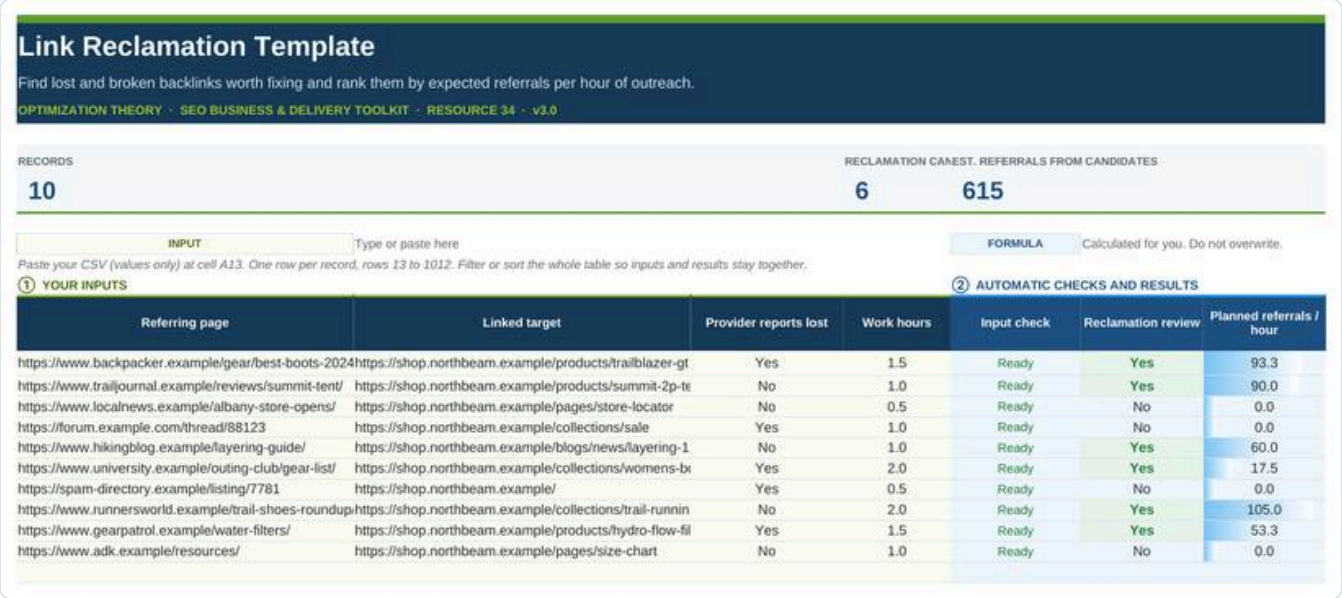
Judge relevance

Mark relevant = 1 only for genuine sites in your space. Skip spam directories.

4

Fix or reach out

Redirect broken targets yourself (fastest), then contact publishers for lost links in ranked order.



Link Reclamation Template

Find lost and broken backlinks worth fixing and rank them by expected referrals per hour of outreach.

OPTIMIZATION THEORY · SEO BUSINESS & DELIVERY TOOLKIT · RESOURCE 34 · v3.0

RECORDS	RECLAMATION CANDIDATES	REFERRALS FROM CANDIDATES
10	6	615

INPUT — Type or paste here

FORMULA — Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 1012. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS ② AUTOMATIC CHECKS AND RESULTS

Referring page	Linked target	Provider reports lost	Work hours	Input check	Reclamation review	Planned referrals / hour
https://www.backpacker.example/gear/best-boots-2024	https://shop.northbeam.example/products/trailblazer-gt	Yes	1.5	Ready	Yes	93.3
https://www.trailjournal.example/reviews/summit-tent/	https://shop.northbeam.example/products/summit-2p-te	No	1.0	Ready	Yes	90.0
https://www.localnews.example/albany-store-opens/	https://shop.northbeam.example/pages/store-locator	No	0.5	Ready	No	0.0
https://forum.example.com/thread/88123	https://shop.northbeam.example/collections/sale	Yes	1.0	Ready	No	0.0
https://www.hikingblog.example/layering-guide/	https://shop.northbeam.example/blogs/news/layering-1	No	1.0	Ready	Yes	60.0
https://www.university.example/outing-club/gear-list/	https://shop.northbeam.example/collections/womens-b	Yes	2.0	Ready	Yes	17.5
https://spam-directory.example/listing/7781	https://shop.northbeam.example/	Yes	0.5	Ready	No	0.0
https://www.runnersworld.example/trail-shoes-roundup	https://shop.northbeam.example/collections/trail-runnin	No	2.0	Ready	Yes	105.0
https://www.gearpatrol.example/water-filters/	https://shop.northbeam.example/products/hydro-flow-fil	Yes	1.5	Ready	Yes	53.3
https://www.adk.example/resources/	https://shop.northbeam.example/pages/size-chart	No	1.0	Ready	No	0.0

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Backlinks API**: live and lost backlinks with their source, target, broken and status flags.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/backlinks/backlinks/live
[
  {
    "target": "yourdomain.com",
    "mode": "as_is",
    "backlinks_status_type": "all",
    "limit": 1000
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 34 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Referring page, Linked target, Provider reports lost, Provider reports broken, Target HTTP status	Human relevance verified, Expected referrals / month, Work hours

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
source_url	Referring page	Page containing or formerly containing the link.	DataForSEO: url_from
target_url	Linked target	Exact linked destination.	DataForSEO: url_to
is_lost	Provider reports lost	Loss flag from the current backlinks response. 1 = Yes, 0 = No.	DataForSEO: is_lost
is_broken	Provider reports broken	Broken flag from the response. Verify independently. 1 = Yes, 0 = No.	DataForSEO: is_broken
target_status	Target HTTP status	Current observed status of the linked target.	DataForSEO: url_to_status_code
relevant	Human relevance verified	1 when restoring the relationship benefits users and the destination is equivalent. 1 = Yes, 0 = No.	Your records or manual review
estimated_referrals	Expected referrals / month	Explicit traffic hypothesis based on actual referral history or a documented assumption.	Your records or manual review
effort_hours	Work hours	Estimated implementation hours, greater than zero.	Your records or manual review
source_ref	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

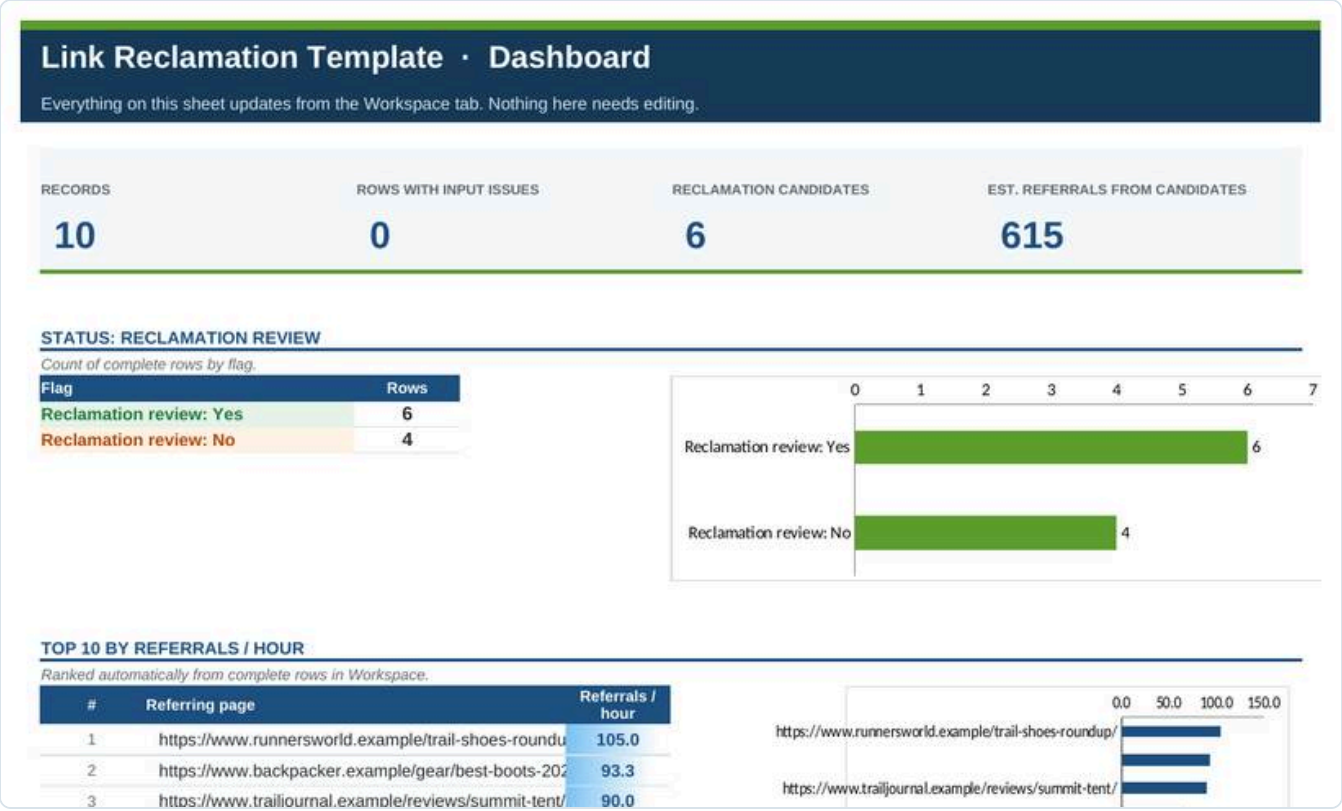
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 10 example rows.

10	0	6	615
Records	Rows with input issues	Reclamation candidates	Est. referrals from candidates

Six example links are worth reclaiming. The top three point at old product and collection URLs that 404, so a redirect on Northbeam's side fixes them without any outreach.

Top 10 by referrals / hour

#	Referring page	Referrals / hour
1	https://www.runnersworld.example/trail-shoes-roundup/	105.0
2	https://www.backpacker.example/gear/best-boots-2024/	93.3
3	https://www.trailjournal.example/reviews/summit-tent/	90.0
4	https://www.hikingblog.example/layering-guide/	60.0
5	https://www.gearpatrol.example/water-filters/	53.3



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Provider link metrics describe observations. They are not a guaranteed amount of transferable ranking value.

Limits. A lost flag can be temporary. Review evidence before contacting a publisher or changing a redirect.

Mistakes to avoid

Chasing spam links. Not every lost link is worth recovering. Relevance first.

Emailing before redirecting. If the target 404s, a redirect fixes it instantly. Outreach is for links that were removed.

Ignoring link value after migrations. Most broken backlinks appear after URL changes. Run this after every migration.

Tips from the field

Use the redirect mapping template to fix broken targets in bulk.

Prioritize links that send real referral traffic, not just authority metrics.

Check for unlinked brand mentions too; they're the next-easiest win.

Questions people ask

What is link reclamation?

Recovering backlinks you've lost or that point to broken URLs on your site, by redirecting targets or asking publishers to update links.

How do I find broken backlinks?

Use a backlink tool's broken backlinks report or filter your backlink export for targets returning 4xx or 5xx status codes.

Should I redirect broken backlinks?

Yes, to the most relevant live page. It recovers the link's value without outreach.

Are lost backlinks a problem?

Some loss is normal. Reclaim the relevant, valuable ones and let low-quality links go.

Templates that work well with this one

Redirect Mapping Template

Map every old URL to its new home and verify each redirect: one permanent hop, a 200 page, no noindex, matching canonical.

Site Migration URL Inventory Template

Inventory every legacy URL with its traffic, profit and links, assign a destination and catch risky retirements.

Internal Linking Opportunity Template

Score each source-to-target internal link by expected visits and contribution per hour, then verify it went live.

Technical SEO Prioritization Template

Turn a technical SEO audit into a ranked fix queue by recovered clicks, profit and profit per hour of dev time.

Brand Entity Consistency Audit

Compare your official brand facts with Wikidata, LinkedIn, GBP, Yelp and more, and log every correction request.

SEO Roadmap Template

Sequence 90 days of SEO and GEO work by weighted opportunity per hour, dependencies and acceptance criteria.

Read the full tutorial online: **optimizationtheory.com/download-view/link-reclamation-template/**
Get all six templates in the **SEO Business & Delivery Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

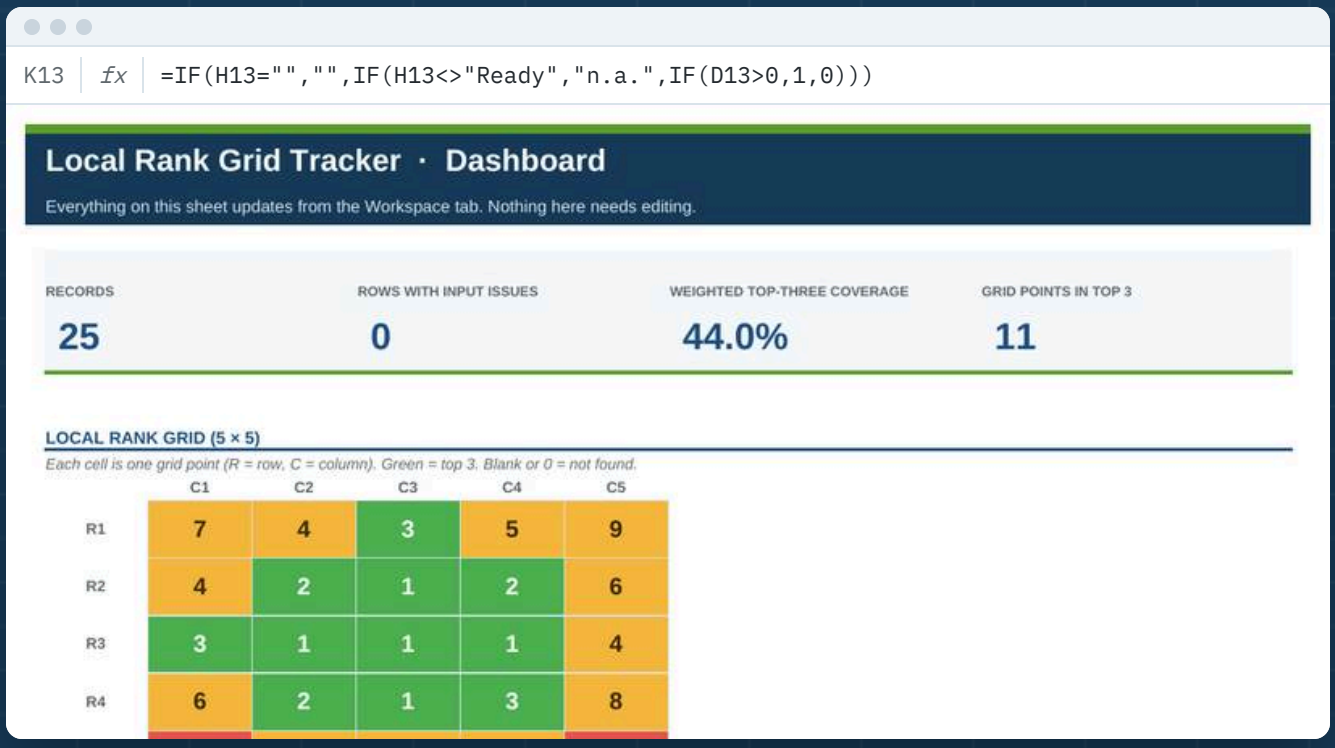
OptimizationTheory.com

SEO Business & Delivery Toolkit, resource 35

Local Rank Grid Tracker

Log rankings across a geo grid, see a colour heatmap and measure weighted top-3 coverage for any local keyword.

Built for the DataForSEO API: SERP API: Google Maps



Jourdan Rombough, optimizationtheory.com

What this template decides

How much of your service area sees your business in the local top 3 for a keyword, and where coverage drops off.

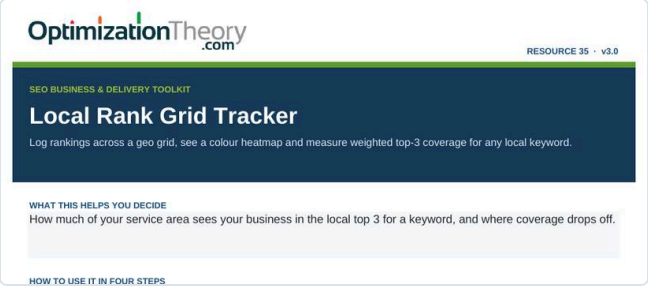
Local rankings change block by block. A business can be first for 'hiking boots near me' at its front door and invisible two miles away. A single rank check from one location tells you almost nothing about how customers across your area see you.

This local rank grid tracker records your business's rank at each point of a grid (5 × 5 in the example) for one keyword. It marks top-3 points, weights them, and calculates weighted top-three coverage. The Dashboard draws the grid as a colour heatmap so the coverage gaps jump out.

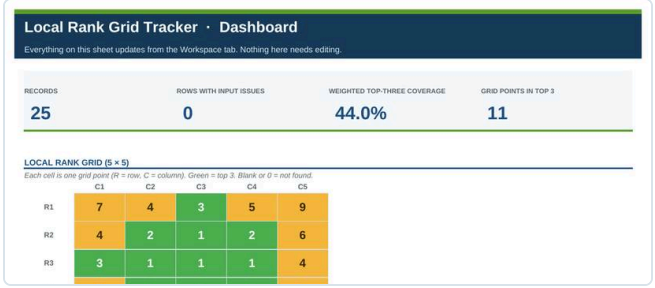
Who it's for

- Local SEOs and multi-location businesses
- Agencies reporting Google Maps visibility
- Service-area businesses choosing where to focus
- Franchises comparing locations

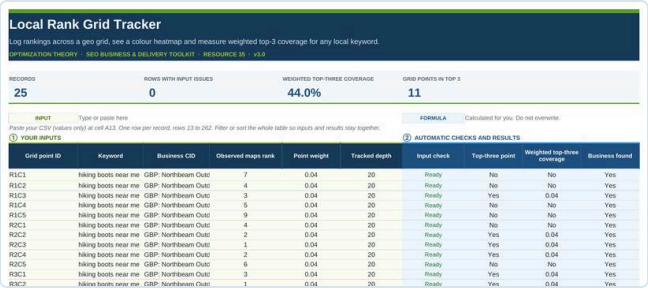
What's in the workbook



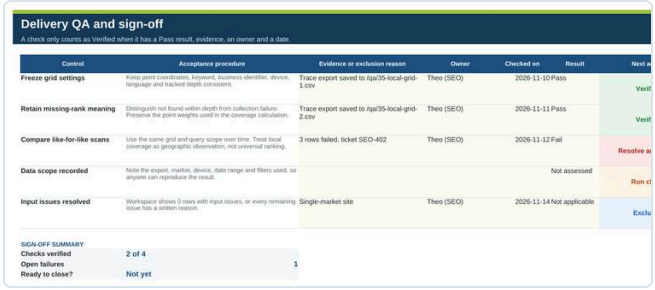
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Top-three point = 1 when rank is 1 to 3. Weighted coverage = top-three point × point weight, summed. Business found = 1 when the rank is above 0.

The key formula, as written in the workbook

```
=IF(H13="","",IF(H13<>"Ready","n.a.",IF(D13>0,1,0)))
```

Result column	Plain-English formula	What it tells you
Top-three point	IF(AND(Observed maps rank>0,Observed maps rank ≤ 3),1,0)	1 if the business appears in positions 1 through 3.
Weighted top-three coverage	Top-three point × Point weight	Contribution to weighted top-three point coverage.
Business found	IF(Observed maps rank>0,1,0)	Confirmed appearance within tracked depth.

How to use it, step by step

1 Define the grid

Pick a center (usually the business) and spacing. Name points R1C1 to R5C5.

2 Collect ranks

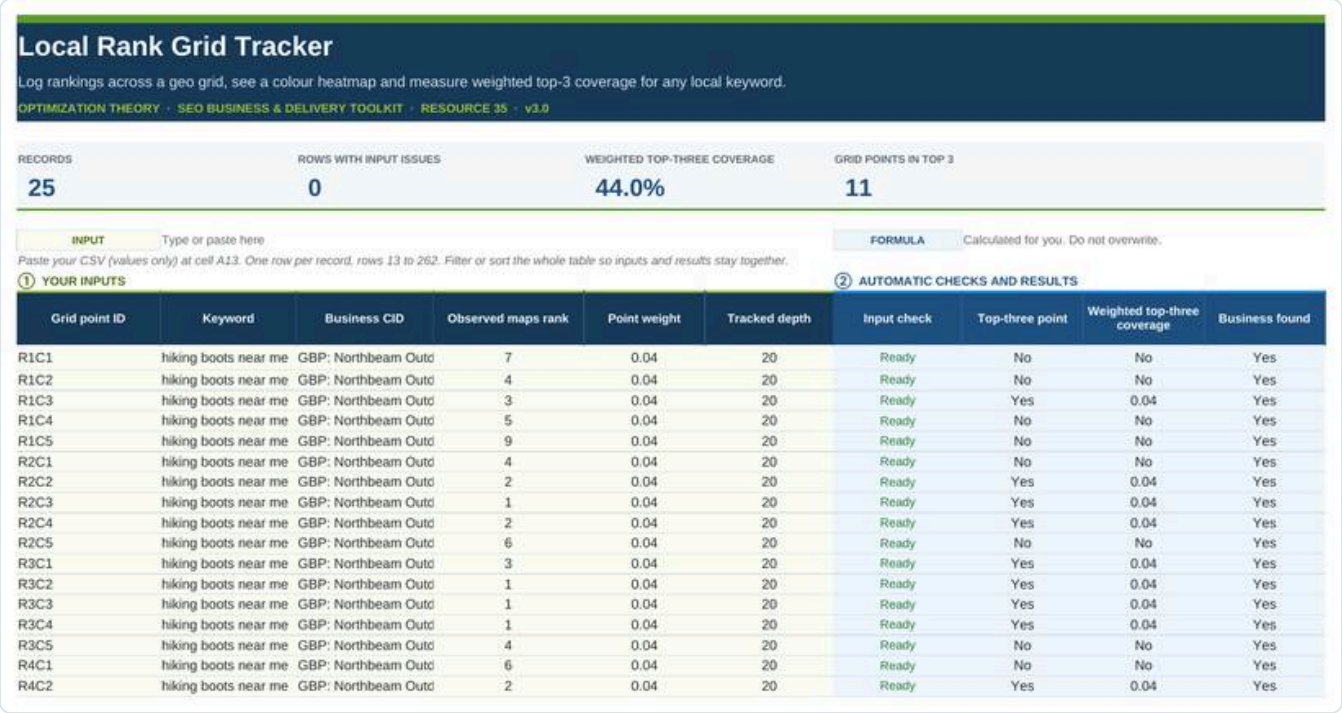
Use a local rank tracker or the DataForSEO Maps endpoint with coordinates. Enter 0 if not found within the tracked depth.

3 Set point weights

Equal weights work by default. Weight points by population or customer density if you have it.

4 Read the heatmap

Red edges show where competitors win. Use them to plan local pages, reviews and citations.



Local Rank Grid Tracker

Log rankings across a geo grid, see a colour heatmap and measure weighted top-3 coverage for any local keyword.

OPTIMIZATION THEORY · SEO BUSINESS & DELIVERY TOOLKIT · RESOURCE 35 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	WEIGHTED TOP-THREE COVERAGE	GRID POINTS IN TOP 3
25	0	44.0%	11

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Grid point ID	Keyword	Business CID	Observed maps rank	Point weight	Tracked depth	Input check	Top-three point	Weighted top-three coverage	Business found
R1C1	hiking boots near me	GBP: Northbeam Outd	7	0.04	20	Ready	No	No	Yes
R1C2	hiking boots near me	GBP: Northbeam Outd	4	0.04	20	Ready	No	No	Yes
R1C3	hiking boots near me	GBP: Northbeam Outd	3	0.04	20	Ready	Yes	0.04	Yes
R1C4	hiking boots near me	GBP: Northbeam Outd	5	0.04	20	Ready	No	No	Yes
R1C5	hiking boots near me	GBP: Northbeam Outd	9	0.04	20	Ready	No	No	Yes
R2C1	hiking boots near me	GBP: Northbeam Outd	4	0.04	20	Ready	No	No	Yes
R2C2	hiking boots near me	GBP: Northbeam Outd	2	0.04	20	Ready	Yes	0.04	Yes
R2C3	hiking boots near me	GBP: Northbeam Outd	1	0.04	20	Ready	Yes	0.04	Yes
R2C4	hiking boots near me	GBP: Northbeam Outd	2	0.04	20	Ready	Yes	0.04	Yes
R2C5	hiking boots near me	GBP: Northbeam Outd	6	0.04	20	Ready	No	No	Yes
R3C1	hiking boots near me	GBP: Northbeam Outd	3	0.04	20	Ready	Yes	0.04	Yes
R3C2	hiking boots near me	GBP: Northbeam Outd	1	0.04	20	Ready	Yes	0.04	Yes
R3C3	hiking boots near me	GBP: Northbeam Outd	1	0.04	20	Ready	Yes	0.04	Yes
R3C4	hiking boots near me	GBP: Northbeam Outd	1	0.04	20	Ready	Yes	0.04	Yes
R3C5	hiking boots near me	GBP: Northbeam Outd	4	0.04	20	Ready	No	No	Yes
R4C1	hiking boots near me	GBP: Northbeam Outd	6	0.04	20	Ready	No	No	Yes
R4C2	hiking boots near me	GBP: Northbeam Outd	2	0.04	20	Ready	Yes	0.04	Yes

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO SERP API: Google Maps**: local map results from an exact coordinate.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/serp/google/maps/live/advanced
[
  {
    "keyword": "hiking boots near me",
    "location_coordinate": "42.6526,-73.7562,14z",
    "language_code": "en"
  }
]
```

Send one task per grid point, changing only location_coordinate.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 35 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Grid point ID, Keyword, Business CID, Observed maps rank	Point weight, Tracked depth

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

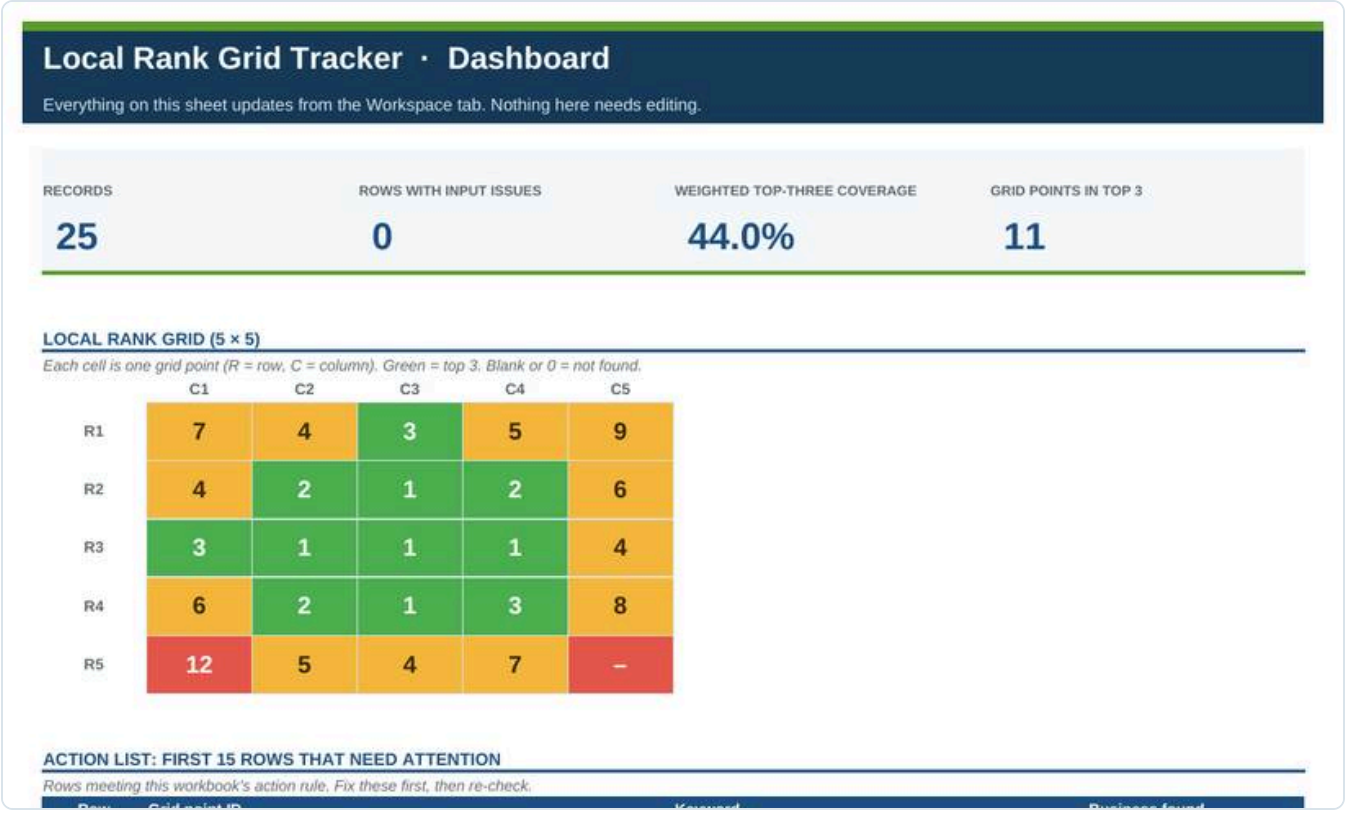
CSV field	Column	Meaning and rule	Typical source
`grid_point`	Grid point ID	Stable coordinate-based search location. The starter import uses the requested coordinate string.	DataForSEO: grid_point
`keyword`	Keyword	Exact query in the selected country and language.	DataForSEO: keyword
`business_id`	Business CID	Exact Google business CID stored as text, never a floating-point number.	DataForSEO: cid
`rank`	Observed maps rank	Rank for the matched business. 0 means confirmed absent within the same tracked depth.	DataForSEO: rank
`point_weight`	Point weight	Relative customer relevance assigned before collection.	Your records or manual review
`tracked_depth`	Tracked depth	Same maximum collected rank at every grid point.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 25 example rows.

25	0	44.0%	11
Records	Rows with input issues	Weighted top-three coverage	Grid points in top 3

The example store holds the top 3 across the center of the grid, slips to positions 4 to 9 toward the edges, and isn't found at all in the far south-east corner. That's a clear targeting brief.



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

This measures coverage of your chosen grid, not an entire city or all local search demand.

Limits. The starter import returns businesses found in responses. It does not invent rows for missing businesses; add confirmed absences deliberately.

Mistakes to avoid

Checking from one location. Proximity is a major local factor. One check shows one point.

Changing grid size between checks. Keep spacing and center constant so trends are real.

Ignoring weights. Coverage over empty fields is worth less than coverage over neighborhoods.

Tips from the field

Track the same grid monthly and keep each month's workbook.

Pair with the entity consistency audit to fix NAP issues.

Use grid results to decide where location or service-area pages are worth building.

Questions people ask

What is a local rank grid?

A set of evenly spaced points around a business where local rankings are checked, showing how visibility changes across the area.

How do I track Google Maps rankings?

Check rankings for a keyword from multiple coordinates using a local rank tracker or an API, then compare across points and over time.

What grid size should I use?

5 × 5 or 7 × 7 with spacing that covers your real service area is common.

Why do my local rankings vary by location?

Proximity to the searcher is a strong local ranking factor, alongside relevance and prominence.

Templates that work well with this one

Brand Entity Consistency Audit

Compare your official brand facts with Wikidata, LinkedIn, GBP, Yelp and more, and log every correction request.

SEO Visibility Score Calculator

Weight rankings by search volume and CTR to see real visibility gains and losses across a fixed keyword set.

AI Citation Tracker

Log answers from ChatGPT, Perplexity, Gemini and AI Overviews, and measure your citation rate by platform.

Ecommerce SEO Prioritization Template

Rank product pages by potential orders, unit contribution and profit per hour, and catch out-of-stock or noindex SKUs.

SEO Roadmap Template

Sequence 90 days of SEO and GEO work by weighted opportunity per hour, dependencies and acceptance criteria.

Hreflang Audit Template

Validate every hreflang relationship: alternate status, self-reference, return tags, canonical match and locale codes.

Read the full tutorial online: **optimizationtheory.com/download-view/local-rank-grid-tracker/**
Get all six templates in the **SEO Business & Delivery Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

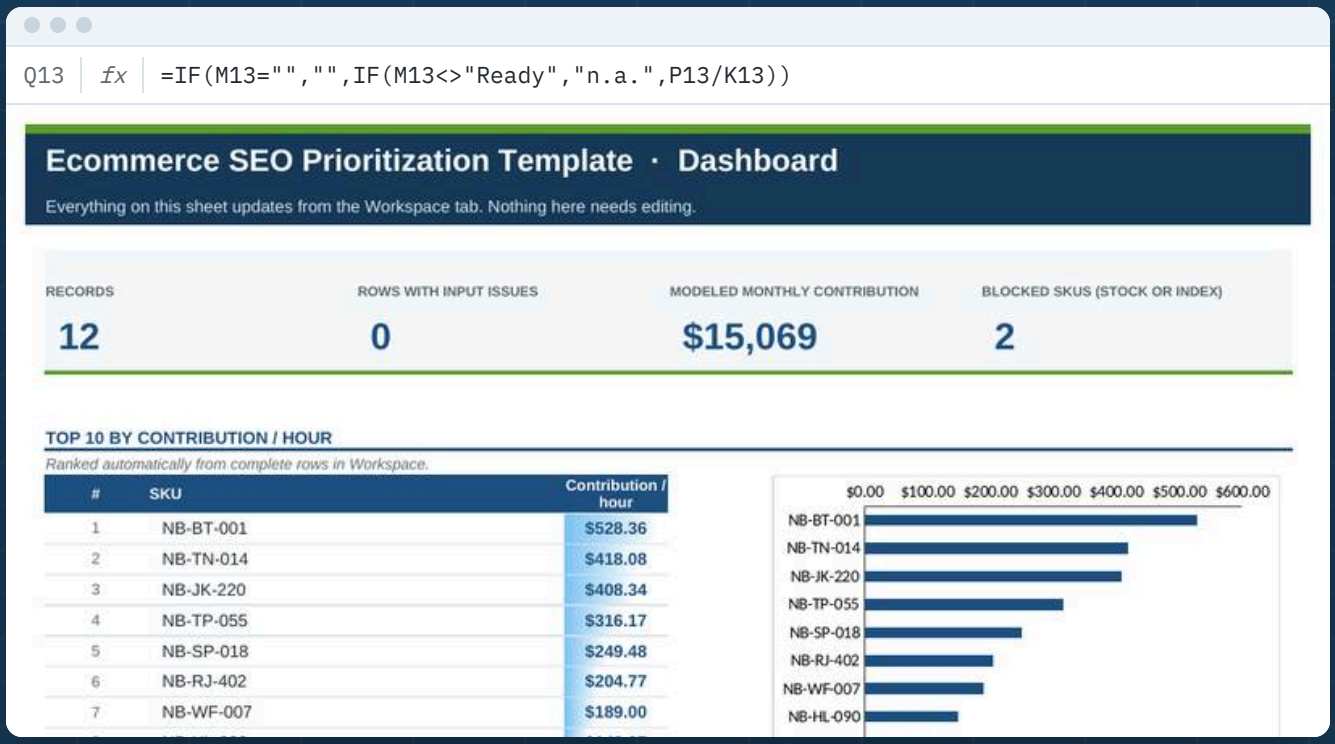
OptimizationTheory.com

SEO Business & Delivery Toolkit, resource 36

Ecommerce SEO Prioritization Template

Rank product pages by potential orders, unit contribution and profit per hour, and catch out-of-stock or noindex SKUs.

Built for the DataForSEO API: Labs: Keyword Overview



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which products deserve SEO work first, based on the profit each could earn per hour invested, and which are blocked by stock or indexing.

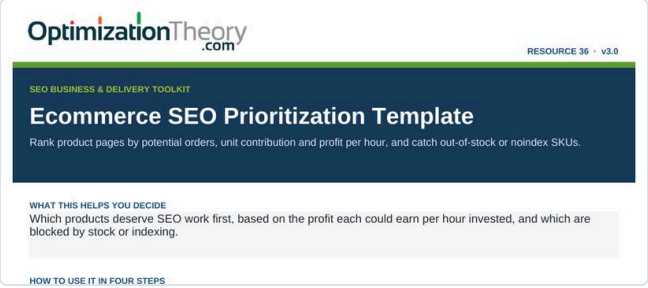
Ecommerce SEO often optimizes the products with the most search volume, which isn't the same as the products that make the most money. A high-volume, low-margin item can be worth less than a niche product with great margins and a clear buyer.

This ecommerce SEO template calculates unit contribution (price minus variable cost), potential monthly orders from search volume, target CTR and conversion rate, monthly contribution and contribution per hour. Products that are out of stock or not indexable are zeroed out and flagged so you don't optimize pages that can't sell or rank.

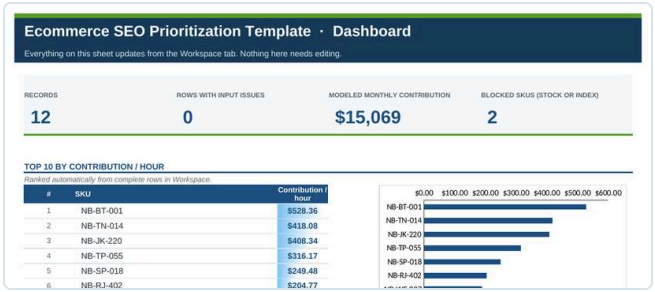
Who it's for

- Ecommerce SEOs and merchandisers
- Shopify, WooCommerce and BigCommerce store owners
- Agencies prioritizing product page work
- Teams deciding which SKUs to feature in content

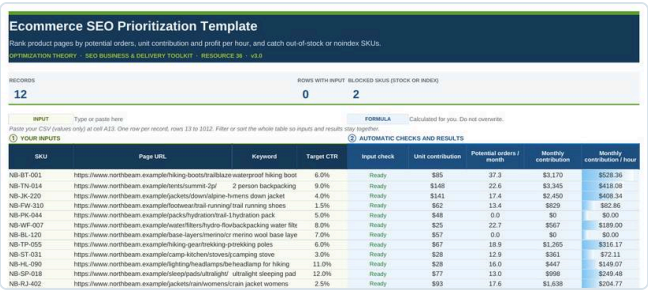
What's in the workbook



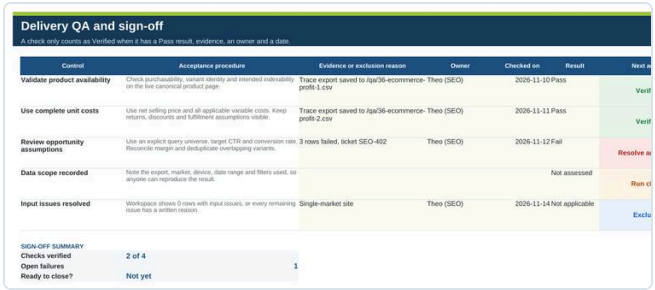
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 1,000 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Unit contribution = sale price – unit variable cost. Potential orders = volume × target CTR × conversion rate, only if available and indexable. Monthly contribution = orders × unit contribution. Per hour = contribution ÷ effort.

The key formula, as written in the workbook

```
=IF(M13="","",IF(M13<>"Ready","n.a.",P13/K13))
```

Result column	Plain-English formula	What it tells you
Unit contribution	Net selling price-Variable unit cost	Net selling price minus variable cost. Can be negative.
Potential orders / month	IF(AND(Available and purchasable=1,Indexability verified=1),Monthly searches × Target CTR × Conversion rate,0)	Gross modeled orders for eligible products.
Monthly contribution	Potential orders ÷ month × Unit contribution	Modeled contribution before fixed SEO cost.
Monthly contribution / hour	Monthly contribution ÷ Work hours	Opportunity comparison after unit economics.

How to use it, step by step

1

Join catalog and keyword data

One row per SKU: URL, target keyword, volume, price, variable cost, stock and indexability.

2

Set target CTR and conversion rate

Use realistic CTR for an achievable position and your product page conversion rate.

3

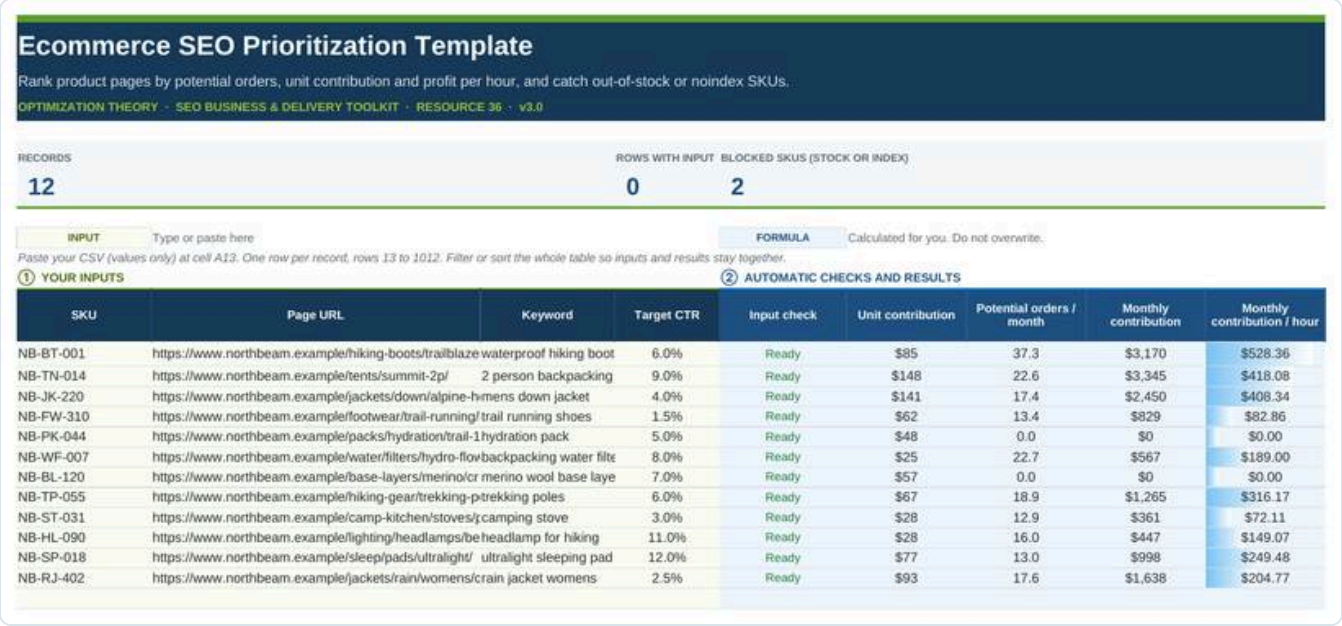
Estimate effort

Hours to improve the page: copy, images, reviews, schema, internal links.

4

Work the ranked list

Sort by contribution per hour. Fix stock or indexing first for flagged SKUs.



Ecommerce SEO Prioritization Template

Rank product pages by potential orders, unit contribution and profit per hour, and catch out-of-stock or noindex SKUs.

OPTIMIZATION THEORY · SEO BUSINESS & DELIVERY TOOLKIT · RESOURCE 36 · v3.0

RECORDS	ROWS WITH INPUT	BLOCKED SKUS (STOCK OR INDEX)
12	0	2

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 1012. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

SKU	Page URL	Keyword	Target CTR	Input check	Unit contribution	Potential orders / month	Monthly contribution	Monthly contribution / hour
NB-BT-001	https://www.northbeam.example/hiking-boots/trailblaze	waterproof hiking boot	6.0%	Ready	$85	37.3	$3,170	$528.36
NB-TN-014	https://www.northbeam.example/tents/summit-2p/	2 person backpacking	9.0%	Ready	$148	22.6	$3,345	$418.08
NB-JK-220	https://www.northbeam.example/jackets/down/alpine-h	mens down jacket	4.0%	Ready	$141	17.4	$2,450	$408.34
NB-FW-310	https://www.northbeam.example/footwear/trail-running/	trail running shoes	1.5%	Ready	$62	13.4	$829	$82.86
NB-PK-044	https://www.northbeam.example/packs/hydration/trail-1	hydration pack	5.0%	Ready	$48	0.0	$0	$0.00
NB-WF-007	https://www.northbeam.example/water/filters/hydro-flo	backpacking water filte	8.0%	Ready	$25	22.7	$567	$189.00
NB-BL-120	https://www.northbeam.example/base-layers/merino/cr	merino wool base laye	7.0%	Ready	$57	0.0	$0	$0.00
NB-TP-055	https://www.northbeam.example/hiking-gear/trekking-p	trekking poles	6.0%	Ready	$67	18.9	$1,265	$316.17
NB-ST-031	https://www.northbeam.example/camp-kitchen/stoves/c	camping stove	3.0%	Ready	$28	12.9	$361	$72.11
NB-HL-090	https://www.northbeam.example/lighting/headlamps/be	headlamp for hiking	11.0%	Ready	$28	16.0	$447	$149.07
NB-SP-018	https://www.northbeam.example/sleep/pads/ultralight/	ultralight sleeping pad	12.0%	Ready	$77	13.0	$998	$249.48
NB-RJ-402	https://www.northbeam.example/jackets/rain/womens/c	rain jacket womens	2.5%	Ready	$93	17.6	$1,638	$204.77

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO Labs: Keyword Overview**: search volume, monthly history, difficulty and intent for a list of keywords.

Most of the data columns fill automatically. Add the business inputs listed below, then paste.

1. Request the data

```
POST https://api.dataforseo.com/v3/dataforseo_labs/google/keyword_overview/live
[
  {
    "keywords": [
      "your keyword 1",
      "your keyword 2"
    ],
    "location_code": 2840,
    "language_code": "en"
  }
]
```

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 36 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Page URL, Keyword, Monthly searches	SKU, Target CTR, Conversion rate, Net selling price, Variable unit cost, Available and purchasable, Indexability verified, Work hours

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`sku`	SKU	Stable product identifier stored as text.	Your records or manual review
`url`	Page URL	Exact absolute URL. Keep case and query parameters unless a documented normalization rule applies.	DataForSEO: url
`keyword`	Keyword	Exact query in the selected country and language.	DataForSEO: keyword
`search_volume`	Monthly searches	Provider monthly search-volume estimate. Use one market, language and source date.	DataForSEO: search_volume
`target_ctr`	Target CTR	Assumed organic click-through rate as a decimal. Calibrate by device, brand and SERP layout. Decimal, 0.08 = 8%.	Your records or manual review
`conversion_rate`	Conversion rate	Conversions divided by eligible organic sessions for the same segment. This is an assumption. Decimal, 0.08 = 8%.	Your records or manual review
`sale_price`	Net selling price	USD realized price after discounts, excluding collected tax.	Your records or manual review
`unit_variable_cost`	Variable unit cost	Product, fulfillment, payment and other variable selling costs per unit.	Your records or manual review
`available`	Available and purchasable	1 after checking stock and checkout eligibility. 1 = Yes, 0 = No.	Your records or manual review
`indexable`	Indexability verified	1 after verifying intended canonical indexability. 1 = Yes, 0 = No.	Your records or manual review
`effort_hours`	Work hours	Estimated implementation hours, greater than zero.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

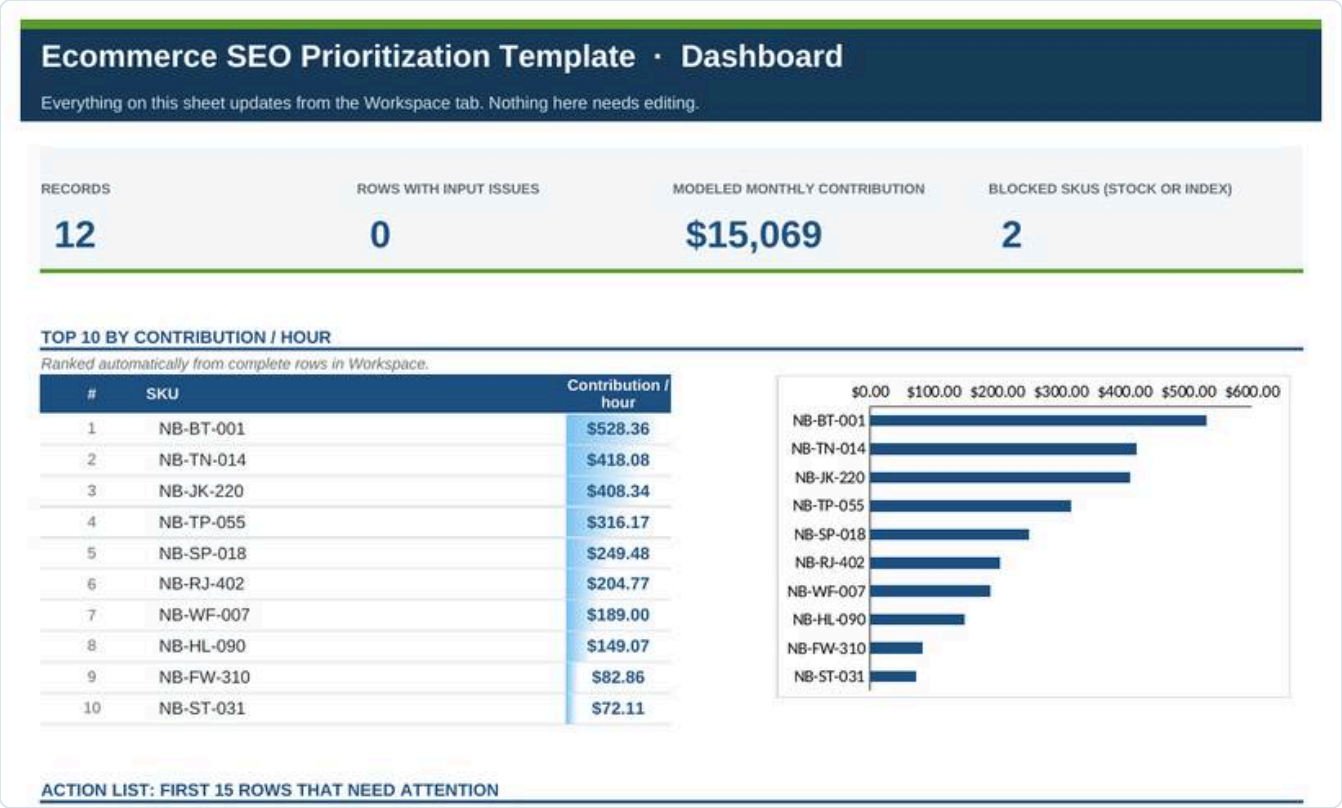
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 12 example rows.

12	0	$15,069	2
Records	Rows with input issues	Modeled monthly contribution	Blocked SKUs (stock or index)

The headlamp and water filter beat the high-volume trail running shoe on contribution per hour. The hydration pack is out of stock and the merino crew is noindexed, so both are zeroed until fixed.

Top 10 by contribution / hour

#	SKU	Contribution / hour
1	NB-BT-001	$528.36
2	NB-TN-014	$418.08
3	NB-JK-220	$408.34
4	NB-TP-055	$316.17
5	NB-SP-018	$249.48



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

A profitable unit does not make a demand forecast certain. Use expected realized prices and full variable costs.

Limits. Keyword search volume is not product sales. Variant overlap can overstate the portfolio if counted repeatedly.

Mistakes to avoid

Using price instead of contribution. Margin decides value. Price flatters expensive, low-margin items.

Optimizing out-of-stock products. Fix availability or redirect before investing.

Forgetting variant and filter URLs. Make sure the URL you optimize is the indexable canonical.

Tips from the field

Check Product schema with the schema audit template.

Link from buying guides to top products with the internal linking template.

Re-run when prices, costs or stock change.

Questions people ask

How do I prioritize products for SEO?

Estimate potential orders from search demand, multiply by profit per unit, and divide by the effort to improve each page.

What is unit contribution?

Sale price minus the variable costs of selling one unit, such as product cost, shipping and payment fees.

Should out-of-stock product pages be noindexed?

Usually no. Keep temporarily unavailable products live; redirect permanently discontinued ones to the closest alternative.

Does this work for Shopify?

Yes. Export products and prices from Shopify, add keyword data, and paste into the template.

Templates that work well with this one

Keyword Prioritization Template

Rank every keyword by the profit it could add per hour of work, not by search volume alone.

SEO Forecast Template

Project added clicks and contribution per keyword cluster with CTR, attainment and seasonality you can defend.

Schema Markup Audit Template

Check presence, syntax, required fields, visible-content match and policy for every structured data type you ship.

Core Web Vitals Tracker

Log p75 LCP, INP and CLS by URL and device, test against Google's good thresholds and see what fails.

Internal Linking Opportunity Template

Score each source-to-target internal link by expected visits and contribution per hour, then verify it went live.

Programmatic SEO Checklist

QA every generated page for verified data, unique value, indexability, links and rendering before release.

Read the full tutorial online: **optimizationtheory.com/download-view/ecommerce-seo-template/**
Get all six templates in the **SEO Business & Delivery Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

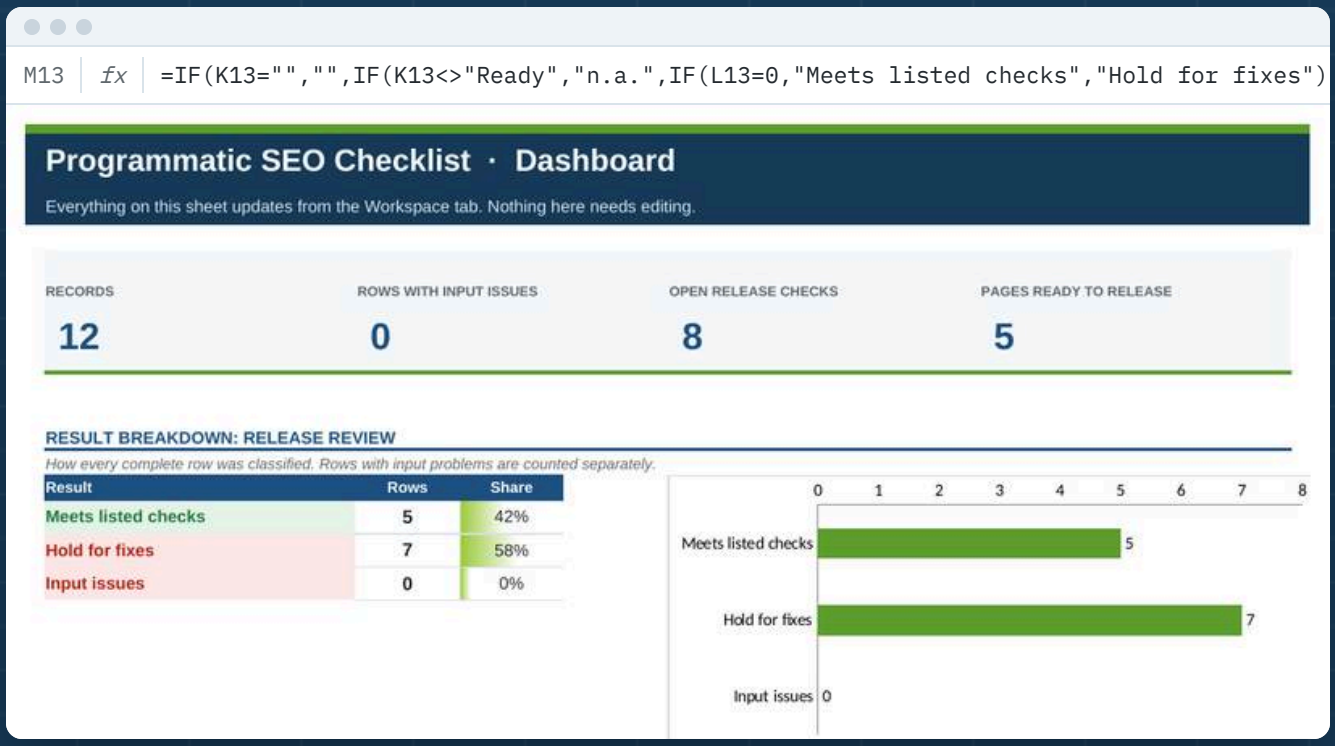
OptimizationTheory.com

SEO Business & Delivery Toolkit, resource 37

Programmatic SEO Checklist

QA every generated page for verified data, unique value, indexability, links and rendering before release.

Built for the DataForSEO API: On-Page API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Which programmatically generated pages are ready to release and which to hold, with the specific checks each one fails.

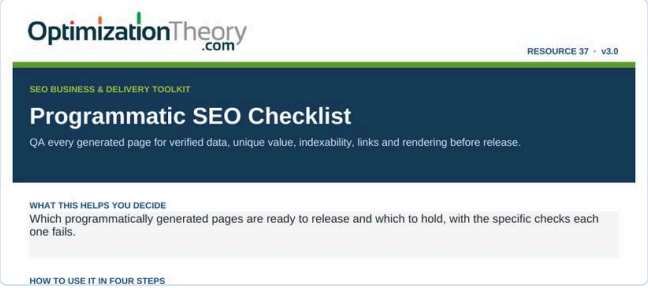
Programmatic SEO can build thousands of useful pages, or thousands of thin ones that drag a whole site down. The difference is quality control at release: verified data, something genuinely useful on each page, and the technical basics.

This programmatic SEO checklist runs five acceptance checks on every generated page: data verified, unique value, indexability, links and rendering. It counts open checks and marks each page Meets listed checks or Hold for fixes, so a batch is released page by page, not all at once on faith.

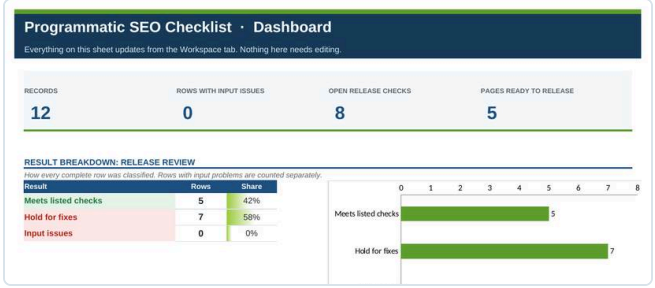
Who it's for

- SEOs launching location, product, comparison or directory pages at scale
- Developers building page templates from datasets
- Content teams reviewing generated pages
- Agencies accountable for a pSEO launch

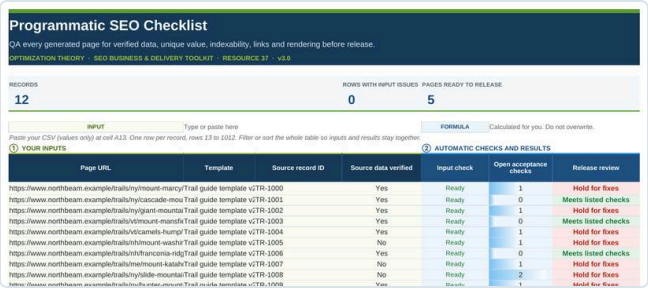
What's in the workbook



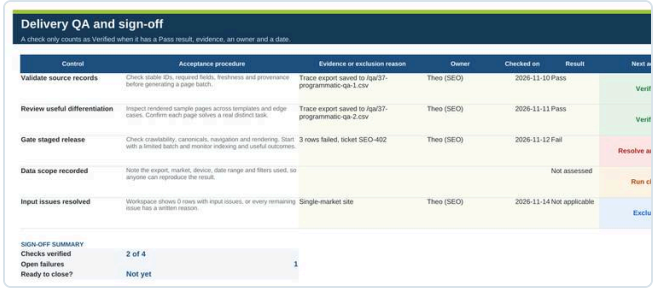
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 1,000 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Open checks = 5 – (data verified + unique value + indexability + links + render verified). Zero open checks = Meets listed checks, otherwise Hold for fixes.

The key formula, as written in the workbook

```
=IF(K13="","",IF(K13<>"Ready","n.a.",IF(L13=0,"Meets listed checks","Hold for fixes")))
```

Result column	Plain-English formula	What it tells you
Open acceptance checks	5-SUM(Source data verified,Useful distinction verified,Indexability verified,Navigation verified,Rendered content verified)	Count of unmet release conditions.
Release review	IF(Open acceptance checks=0,"Meets listed checks","Hold for fixes")	Template/URL review outcome based on actual evidence.

The results you'll see

Meets listed checks Hold for fixes

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

Release in batches

Generate a small batch first. One row per page with its template and record ID.

2

Verify the data

Spot-check each page's facts against the source dataset. Mark 1 only if correct.

3

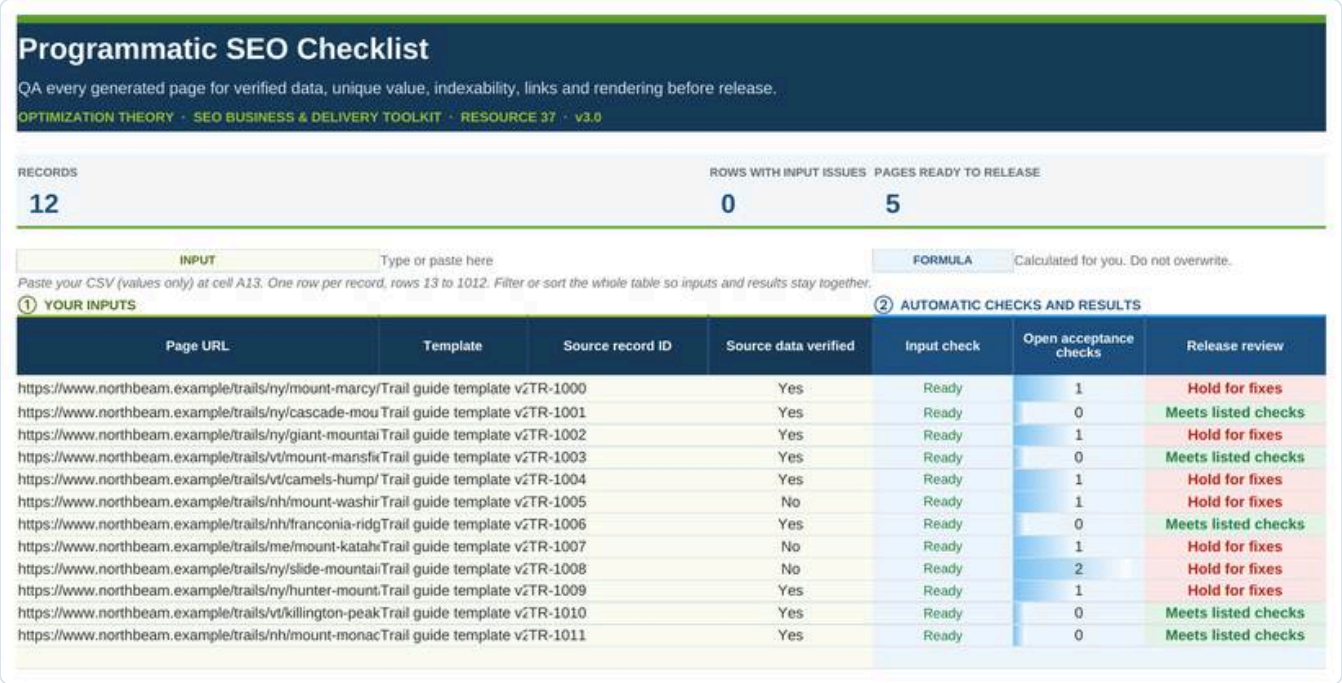
Judge unique value

Does the page offer something a user can't get from the template alone? Be strict.

4

Check tech and render

Indexable, internally linked, and renders correctly with JavaScript. Release only pages with zero open checks.



Programmatic SEO Checklist

QA every generated page for verified data, unique value, indexability, links and rendering before release.

OPTIMIZATION THEORY · SEO BUSINESS & DELIVERY TOOLKIT · RESOURCE 37 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	PAGES READY TO RELEASE
12	0	5

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 1012. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Page URL	Template	Source record ID	Source data verified	Input check	Open acceptance checks	Release review
https://www.northbeam.example/trails/ny/mount-marcy/	Trail guide template v2	TR-1000	Yes	Ready	1	Hold for fixes
https://www.northbeam.example/trails/ny/cascade-mou	Trail guide template v2	TR-1001	Yes	Ready	0	Meets listed checks
https://www.northbeam.example/trails/ny/giant-mountai	Trail guide template v2	TR-1002	Yes	Ready	1	Hold for fixes
https://www.northbeam.example/trails/vt/mount-mansfie	Trail guide template v2	TR-1003	Yes	Ready	0	Meets listed checks
https://www.northbeam.example/trails/vt/camels-hump/	Trail guide template v2	TR-1004	Yes	Ready	1	Hold for fixes
https://www.northbeam.example/trails/nh/mount-washir	Trail guide template v2	TR-1005	No	Ready	1	Hold for fixes
https://www.northbeam.example/trails/nh/franconia-ridg	Trail guide template v2	TR-1006	Yes	Ready	0	Meets listed checks
https://www.northbeam.example/trails/me/mount-katahi	Trail guide template v2	TR-1007	No	Ready	1	Hold for fixes
https://www.northbeam.example/trails/ny/slide-mountai	Trail guide template v2	TR-1008	No	Ready	2	Hold for fixes
https://www.northbeam.example/trails/ny/hunter-mount	Trail guide template v2	TR-1009	Yes	Ready	1	Hold for fixes
https://www.northbeam.example/trails/vt/killington-peak	Trail guide template v2	TR-1010	Yes	Ready	0	Meets listed checks
https://www.northbeam.example/trails/nh/mount-monac	Trail guide template v2	TR-1011	Yes	Ready	0	Meets listed checks

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

This is a sign-off workflow. DataForSEO responses are the evidence you attach; the human checks stay manual by design.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 37 --csv --input my-filled.csv --output my
-inputs.csv
```

Fills automatically	You add
Page URL	Template, Source record ID, Source data verified, Useful distinction verified, Indexability verified, Navigation verified, Rendered content verified, Evidence

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`url`	Page URL	Exact absolute URL. Keep case and query parameters unless a documented normalization rule applies.	DataForSEO: url
`template`	Template	Named programmatic page type.	Your records or manual review
`record_id`	Source record ID	Stable underlying business-data identifier.	Your records or manual review
`data_verified`	Source data verified	1 after checking source data completeness and correctness. 1 = Yes, 0 = No.	Your records or manual review
`unique_value`	Useful distinction verified	1 after a human confirms this URL serves a distinct useful task. 1 = Yes, 0 = No.	Your records or manual review
`indexability`	Indexability verified	1 after status, robots, noindex and canonical checks. 1 = Yes, 0 = No.	Your records or manual review
`links`	Navigation verified	1 after checking the page is reachable in useful site navigation. 1 = Yes, 0 = No.	Your records or manual review
`render_verified`	Rendered content verified	1 after checking the actual rendered output and key content. 1 = Yes, 0 = No.	Your records or manual review
`evidence`	Evidence	Link to a dated crawl, screenshot, ticket or source that another reviewer can inspect.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

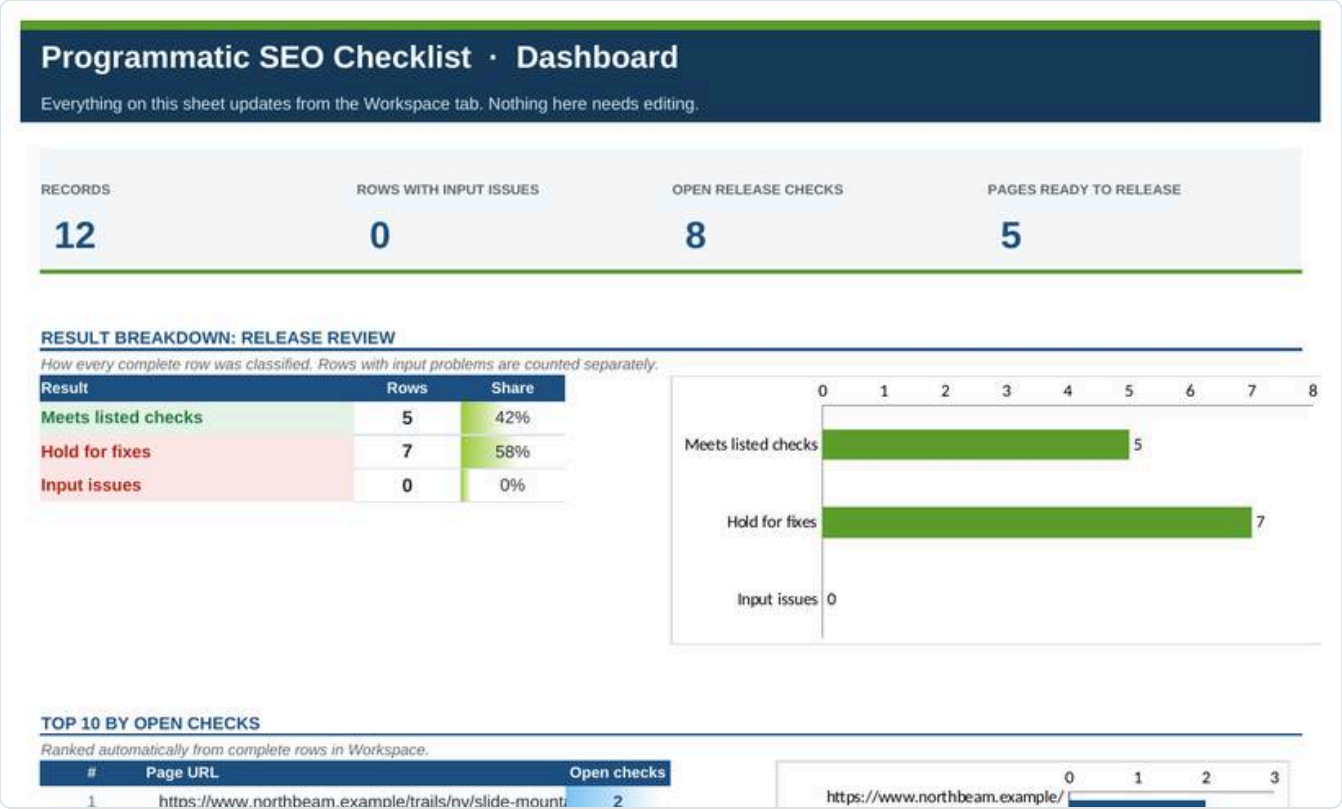
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 12 example rows.

12	0	8	5
Records	Rows with input issues	Open release checks	Pages ready to release

Only five of 12 example trail pages are ready. Most holds trace back to unverified data or missing unique value, which are dataset and template problems, not page-by-page fixes.

Top 10 by open checks

#	Page URL	Open checks
1	https://www.northbeam.example/trails/ny/slide-mountain/	2
2	https://www.northbeam.example/trails/ny/hunter-mountain/	1
3	https://www.northbeam.example/trails/me/mount-katahdin/	1
4	https://www.northbeam.example/trails/nh/mount-washington/	1
5	https://www.northbeam.example/trails/vt/camels-hump/	1



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Generating many URLs is not evidence of demand or usefulness. Acceptance checks should protect real user tasks.

Limits. A sample cannot prove every generated page is correct. Automated record-level checks and reviewed edge cases remain necessary.

Mistakes to avoid

Launching the whole dataset at once. Release in batches and watch indexing and engagement before scaling.

Unique value by find-and-replace. Swapping a city name isn't unique value. Add data, media or analysis per page.

No internal links to generated pages. Orphaned programmatic pages rarely get crawled or indexed.

Tips from the field

Track indexation of each batch with the indexability audit.

Add generated pages to sitemaps only after they pass QA.

Use the schema audit for structured data on templates.

Questions people ask

What is programmatic SEO?

Creating many pages from a template and a dataset to target large sets of related queries, like locations, products or comparisons.

Is programmatic SEO spam?

Not inherently. It becomes scaled content abuse when pages exist mainly to rank without providing real value.

How do I QA programmatic pages?

Verify the data, confirm each page has unique value, check indexability and internal links, and make sure it renders correctly.

How many pages should I launch at once?

Start with a small batch, monitor indexing and quality signals, then scale gradually.

Templates that work well with this one

Schema Markup Audit Template

Check presence, syntax, required fields, visible-content match and policy for every structured data type you ship.

Indexability Audit Template

Check status, robots, noindex and canonical on every page you want indexed, then see exactly what to fix first.

XML Sitemap Audit Template

Reconcile sitemap URLs against status, canonical, robots and noindex to see what to add, remove or fix.

Internal Linking Opportunity Template

Score each source-to-target internal link by expected visits and contribution per hour, then verify it went live.

Ecommerce SEO Prioritization Template

Rank product pages by potential orders, unit contribution and profit per hour, and catch out-of-stock or noindex SKUs.

Crawl Budget Analysis Template

Group verified Googlebot requests by URL pattern, measure crawl waste and pick the right fix for each pattern.

Read the full tutorial online: **optimizationtheory.com/download-view/programmatic-seo-checklist/**
Get all six templates in the **SEO Business & Delivery Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

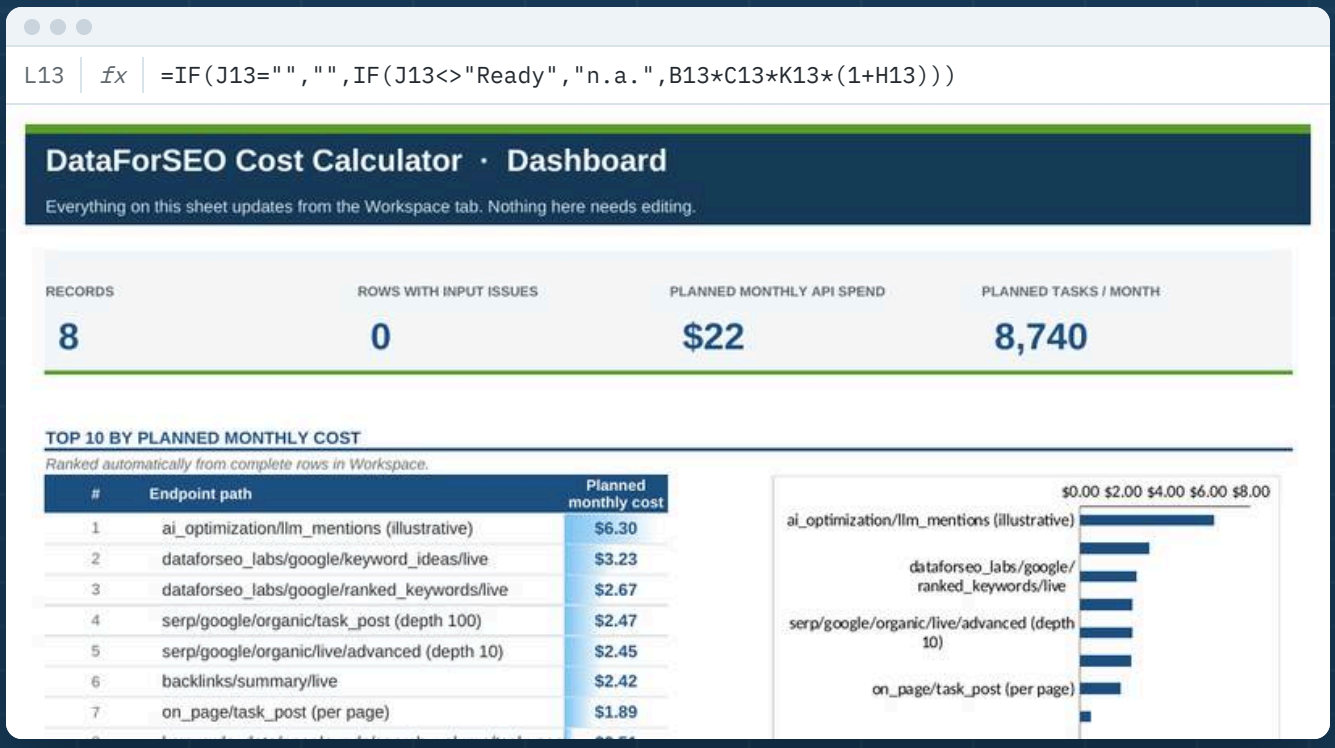
OptimizationTheory.com

SEO Business & Delivery Toolkit, resource 38

DataForSEO Cost Calculator

Estimate monthly DataForSEO API spend by endpoint from tasks, cycles, row pricing and retries before you run a job.

Built for the DataForSEO API: SERP API: Google Organic



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

What a planned data collection will cost each month by endpoint, including per-row charges and retries, before you spend the credits.

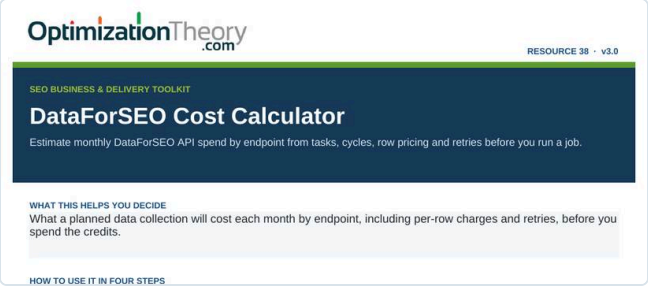
APIs like DataForSEO make SEO data cheap per call and surprisingly expensive per month. A rank tracking job that looks like a few dollars can turn into a few hundred once depth, frequency, row pricing and retries are multiplied out.

This DataForSEO cost calculator lists each endpoint you plan to use with tasks per cycle, cycles per month, base price, extra price, per-row price, rows per task and a retry rate. It calculates unit cost, monthly cost and total tasks, so you can design the collection to fit your budget. Example prices are illustrative; always copy current prices from your DataForSEO account.

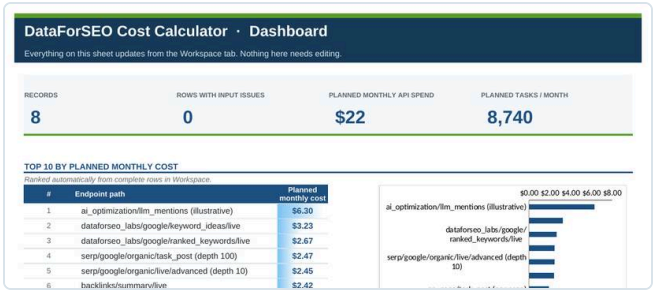
Who it's for

- SEOs and developers building data pipelines on DataForSEO
- Agencies pricing data-heavy reporting
- Teams moving from SEO tool subscriptions to APIs
- Anyone using Claude, n8n or scripts with DataForSEO

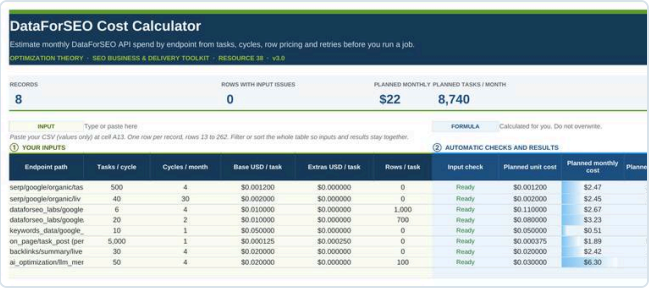
What's in the workbook



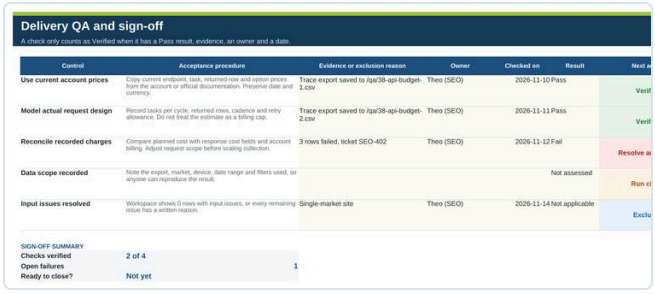
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Unit cost = base price + extra price + row price × rows per task. Monthly cost = tasks per cycle × cycles × unit cost × (1 + retry rate). Monthly tasks = tasks × cycles × (1 + retry rate).

The key formula, as written in the workbook

```
=IF(J13="","",IF(J13<>"Ready","n.a.",B13*C13*K13*(1+H13)))
```

Result column	Plain-English formula	What it tells you
Planned unit cost	Base USD ÷ task+Extras USD ÷ task+USD ÷ returned row × Rows ÷ task	Base plus extras plus applicable row charges.
Planned monthly cost	Tasks ÷ cycle × Cycles ÷ month × Planned unit cost × (1+Retry allowance)	Expected billable workload times unit cost and allowance.
Planned task count	Tasks ÷ cycle × Cycles ÷ month × (1+Retry allowance)	Task workload including the planning allowance.

How to use it, step by step

1

List the endpoints

One row per endpoint and configuration (e.g. live vs task queue, depth 10 vs 100).

2

Copy current prices

From your DataForSEO pricing page: base price, extras and any per-row price.

3

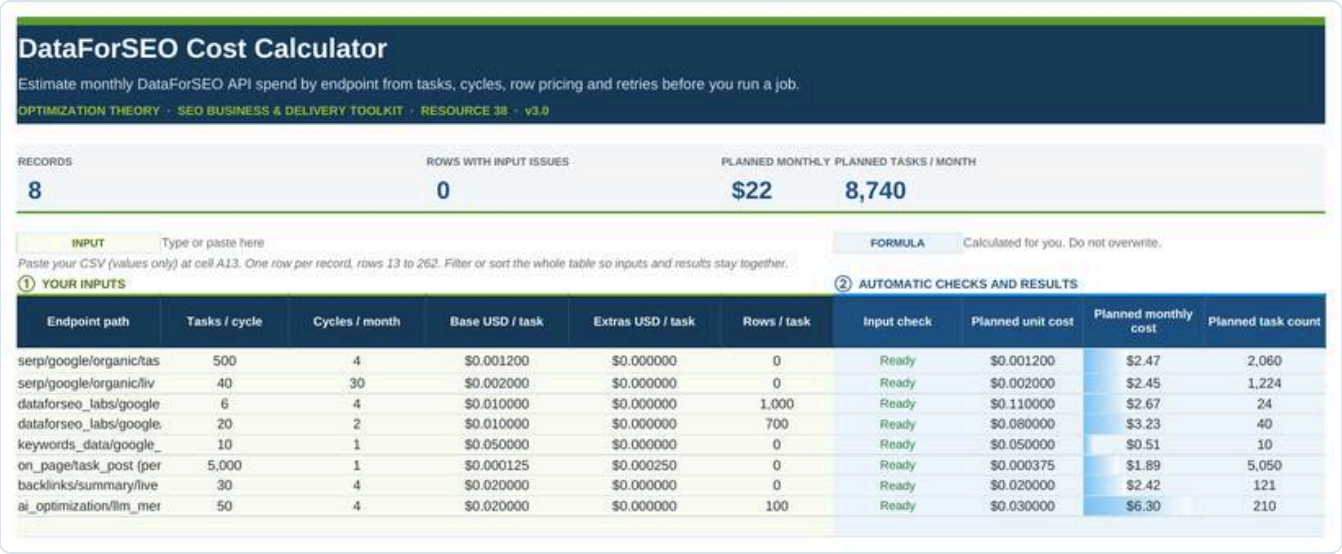
Set volume and frequency

Tasks per cycle (keywords, URLs, domains) and cycles per month.

4

Add retries and review

Use a retry rate for failed or repeated calls. Check the Top 10 for the endpoints driving cost.



DataForSEO Cost Calculator

Estimate monthly DataForSEO API spend by endpoint from tasks, cycles, row pricing and retries before you run a job.

OPTIMIZATION THEORY · SEO BUSINESS & DELIVERY TOOLKIT · RESOURCE 38 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	PLANNED MONTHLY	PLANNED TASKS / MONTH
8	0	$22	8,740

INPUT Type or paste here

FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS

② AUTOMATIC CHECKS AND RESULTS

Endpoint path	Tasks / cycle	Cycles / month	Base USD / task	Extras USD / task	Rows / task	Input check	Planned unit cost	Planned monthly cost	Planned task count
serp/google/organic/tas	500	4	$0.001200	$0.000000	0	Ready	$0.001200	$2.47	2,060
serp/google/organic/liv	40	30	$0.002000	$0.000000	0	Ready	$0.002000	$2.45	1,224
dataforseo_labs/google	6	4	$0.010000	$0.000000	1,000	Ready	$0.110000	$2.67	24
dataforseo_labs/google	20	2	$0.010000	$0.000000	700	Ready	$0.080000	$3.23	40
keywords_data/google_	10	1	$0.050000	$0.000000	0	Ready	$0.050000	$0.51	10
on_page/task_post (per	5,000	1	$0.000125	$0.000250	0	Ready	$0.000375	$1.89	5,050
backlinks/summary/live	30	4	$0.020000	$0.000000	0	Ready	$0.020000	$2.42	121
ai_optimization/llm_mer	50	4	$0.020000	$0.000000	100	Ready	$0.030000	$6.30	210

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO SERP API: Google Organic**: the top organic results for a query.

This is a sign-off workflow. DataForSEO responses are the evidence you attach; the human checks stay manual by design. Use this before any of the others. Check your balance with the free appendix/user_data endpoint and copy current prices from your DataForSEO pricing page.

1. Request the data

```
POST https://api.dataforseo.com/v3/serp/google/organic/live/advanced
[
  {
    "keyword": "your keyword",
    "location_code": 2840,
    "language_code": "en",
    "device": "desktop",
    "depth": 10
  }
]
```

Send one task per query with identical location, language and device, and save each response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

Fills automatically	You add
Source reference (audit trail)	Endpoint path, Tasks / cycle, Cycles / month, Base USD / task, Extras USD / task, USD / returned row, Rows / task, Retry allowance

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`endpoint`	Endpoint path	Exact current API endpoint for the requested collection.	Your records or manual review
`tasks_per_cycle`	Tasks / cycle	Number of task units billed under the endpoint price model.	Your records or manual review
`cycles_per_month`	Cycles / month	Scheduled runs in the month.	Your records or manual review
`base_price`	Base USD / task	Current account-specific unit price. Enter it manually from your account or current pricing.	Your records or manual review
`extra_price`	Extras USD / task	Average optional feature charges per task under your requested settings.	Your records or manual review
`row_price`	USD / returned row	Marginal returned-row price where applicable. Enter 0 only if no row-based charge applies.	Your records or manual review
`rows_per_task`	Rows / task	Planned average returned rows where row billing applies.	Your records or manual review
`retry_rate`	Retry allowance	Expected additional billable task proportion. Confirm billing behavior for your endpoint. Decimal, 0.08 = 8%.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

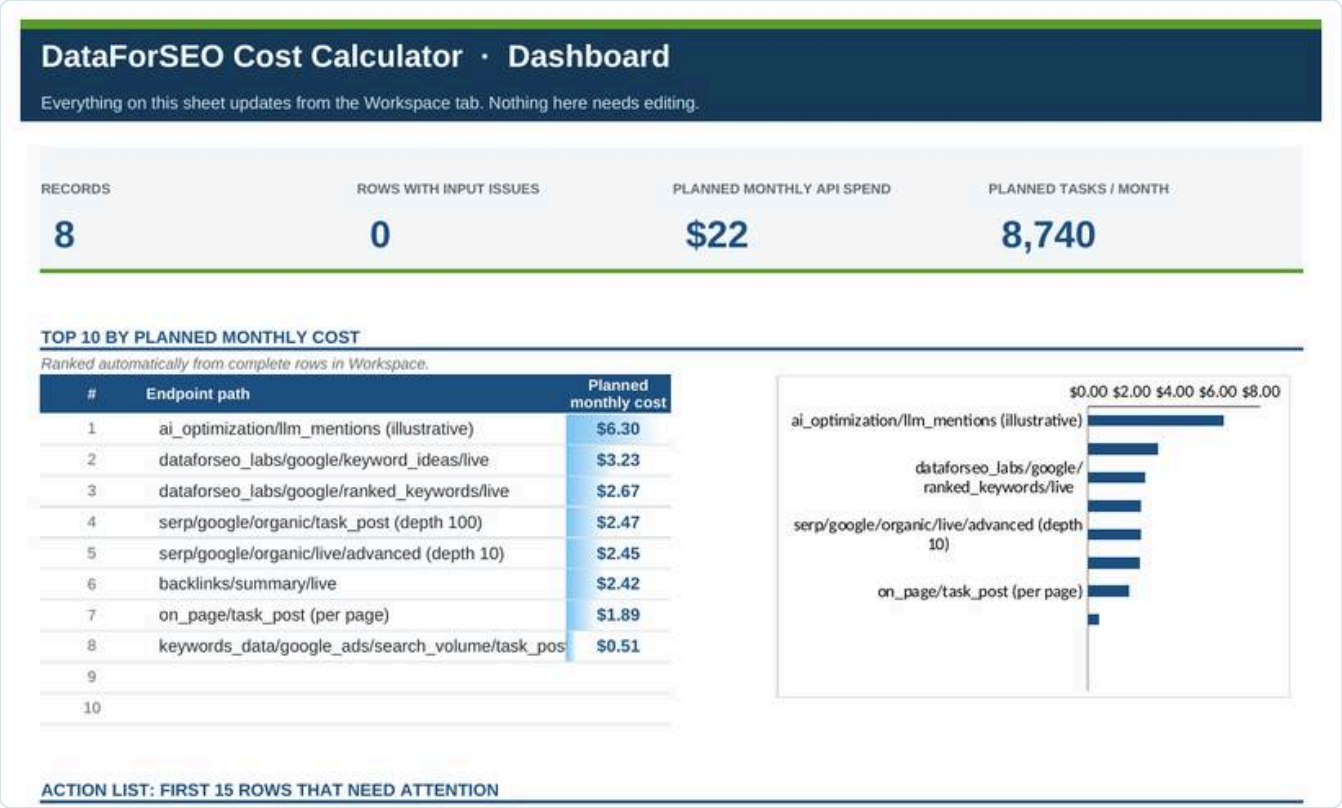
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 8 example rows.

8	0	$22	8,740
Records	Rows with input issues	Planned monthly API spend	Planned tasks / month

With these illustrative prices the example plan runs about $22 a month. The LLM mentions line and the two Labs endpoints are the biggest costs because they charge per returned row, so capping rows is the first saving lever.

Top 10 by planned monthly cost

#	Endpoint path	Planned monthly cost
1	ai_optimization/llm_mentions (illustrative)	$6.30
2	dataforseo_labs/google/keyword_ideas/live	$3.23
3	dataforseo_labs/google/ranked_keywords/live	$2.67
4	serp/google/organic/task_post (depth 100)	$2.47
5	serp/google/organic/live/advanced (depth 10)	$2.45



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

This supports task-plus-row billing only when it matches your endpoint. Model tiered blocks or minimum charges separately.

Limits. All starter prices are synthetic and are not DataForSEO quotations. Collection settings and account terms determine actual charges.

Mistakes to avoid

Using live endpoints for scheduled jobs. Task queue (standard) endpoints are cheaper when you don't need results instantly.

Forgetting per-row pricing. Labs and similar endpoints charge per returned row. Limit rows to what you need.

Assuming zero retries. Timeouts and reruns happen. Budget for them.

Tips from the field

Check your balance before big jobs; the user data endpoint is free.

Cache responses and reuse them across reports.

Pair with the SEO agent workflow article for practical pipelines.

Questions people ask

How much does DataForSEO cost?

It's pay-as-you-go, priced per task, with some endpoints adding per-row charges. Costs depend on endpoint, depth, method and volume. Check the official pricing page for current rates.

Is DataForSEO cheaper than SEO tools?

For targeted, repeatable data jobs it often is. For broad exploratory research, a subscription tool may be simpler.

What's the difference between live and standard endpoints?

Live returns results immediately at a higher price; standard (task_post then task_get) is cheaper and returns results later.

Are the prices in the template current?

No. They're illustrative. Replace them with the current prices from your DataForSEO account.

Templates that work well with this one

Keyword Gap Analysis Template
Find the queries your competitors rank for that you don't, and size each gap in potential clicks.

Keyword Prioritization Template
Rank every keyword by the profit it could add per hour of work, not by search volume alone.

AI Citation Tracker
Log answers from ChatGPT, Perplexity, Gemini and AI Overviews, and measure your citation rate by platform.

Local Rank Grid Tracker
Log rankings across a geo grid, see a colour heatmap and measure weighted top-3 coverage for any local keyword.

Technical SEO Prioritization Template
Turn a technical SEO audit into a ranked fix queue by recovered clicks, profit and profit per hour of dev time.

SEO Forecast Template
Project added clicks and contribution per keyword cluster with CTR, attainment and seasonality you can defend.

Read the full tutorial online: **optimizationtheory.com/download-view/dataforseo-cost-calculator/**
Get all six templates in the **SEO Business & Delivery Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

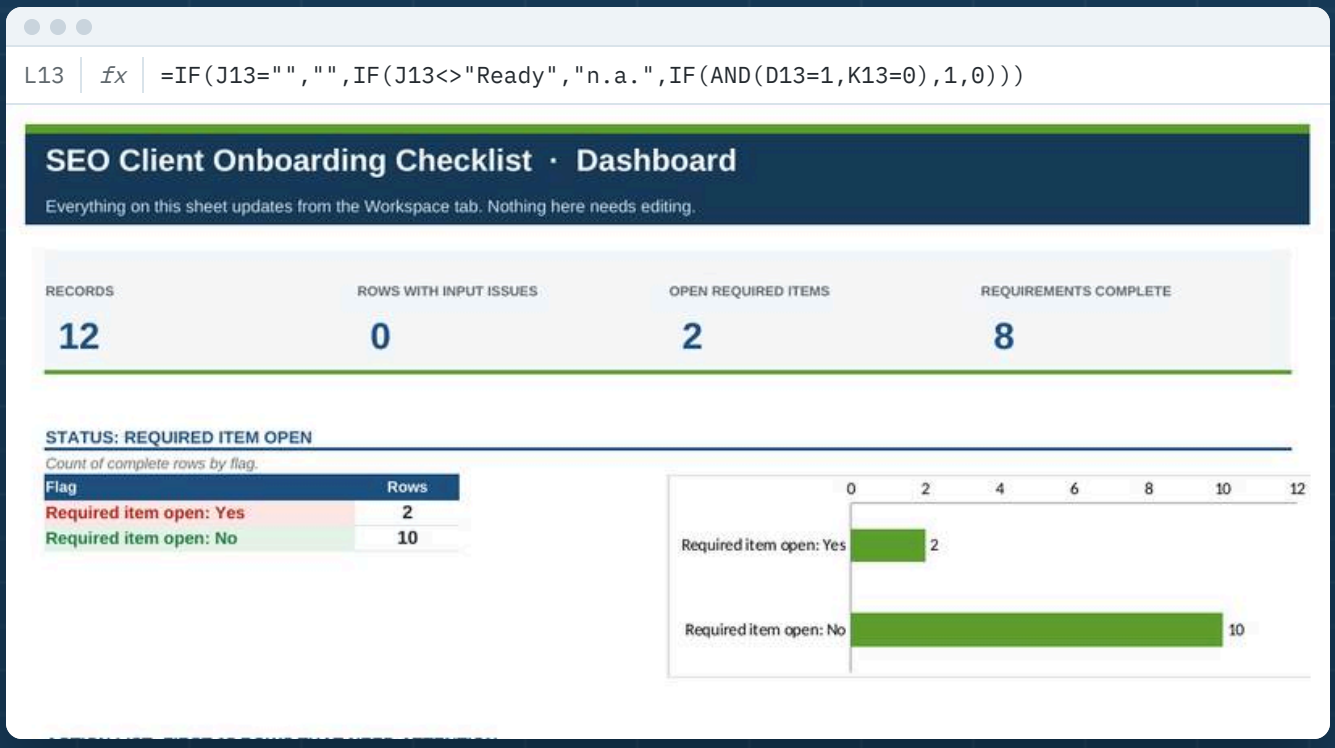
OptimizationTheory.com

SEO Business & Delivery Toolkit, resource 39

SEO Client Onboarding Checklist

Track every access, definition and baseline export a new SEO engagement needs, with owners and blockers.

Built for the DataForSEO API: On-Page API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

Whether a new SEO engagement has everything it needs to start: access verified, definitions agreed and baselines captured, and what's blocking the rest.

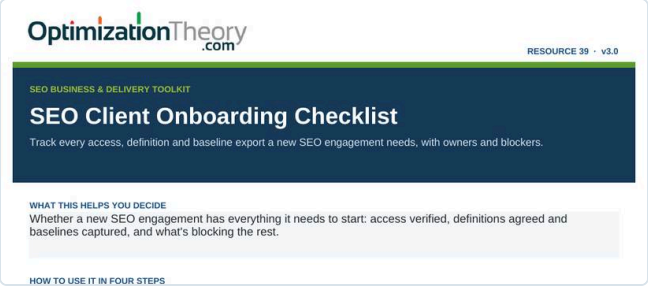
The first month of an SEO engagement is often lost to waiting: for Search Console access, for analytics permissions, for someone to explain what counts as a conversion. Every week of waiting is a week of strategy built on guesses.

This SEO onboarding checklist lists each requirement with the system, whether it's required, whether access is verified, owner, evidence and blocker. A requirement is complete only when access is verified with evidence. Required items still open are counted and listed on the Dashboard.

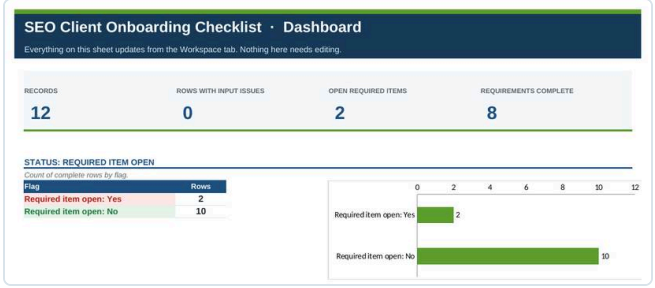
Who it's for

- Consultants and agencies onboarding SEO clients
- In-house SEOs joining a new company
- Project managers kicking off SEO projects
- Clients who want to know what to prepare

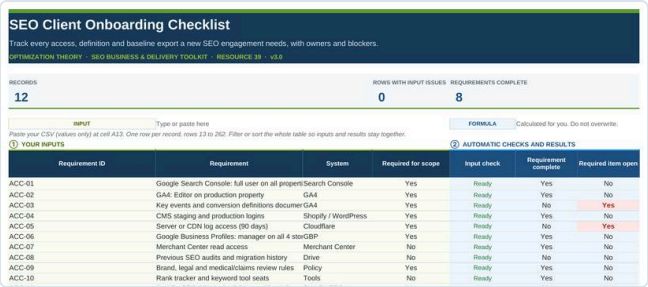
What's in the workbook



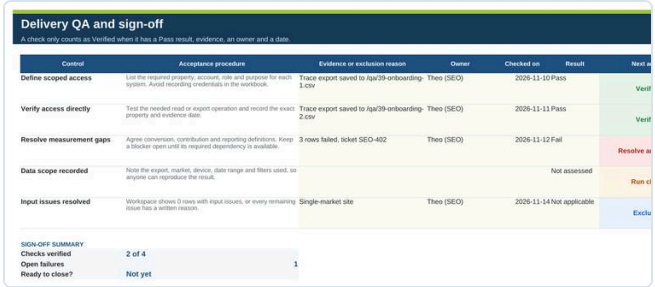
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Requirement complete = 1 when access verified is 1 and evidence exists. Required item open = 1 when the item is required and not complete.

The key formula, as written in the workbook

```
=IF(J13="","",IF(J13<>"Ready","n.a.",IF(AND(D13=1,K13=0),1,0)))
```

Result column	Plain-English formula	What it tells you
Requirement complete	IF(AND(Access verified=1,Verification evidence ≠ ""),1,0)	Usable access plus verification evidence.
Required item open	IF(AND(Required for scope=1,Requirement complete=0),1,0)	A required item remains open until verified with evidence.

How to use it, step by step

1

Send the list before kickoff

Share the requirements with the client so access requests start early.

2

Assign owners on both sides

Each item needs a named person who can grant or confirm it.

3

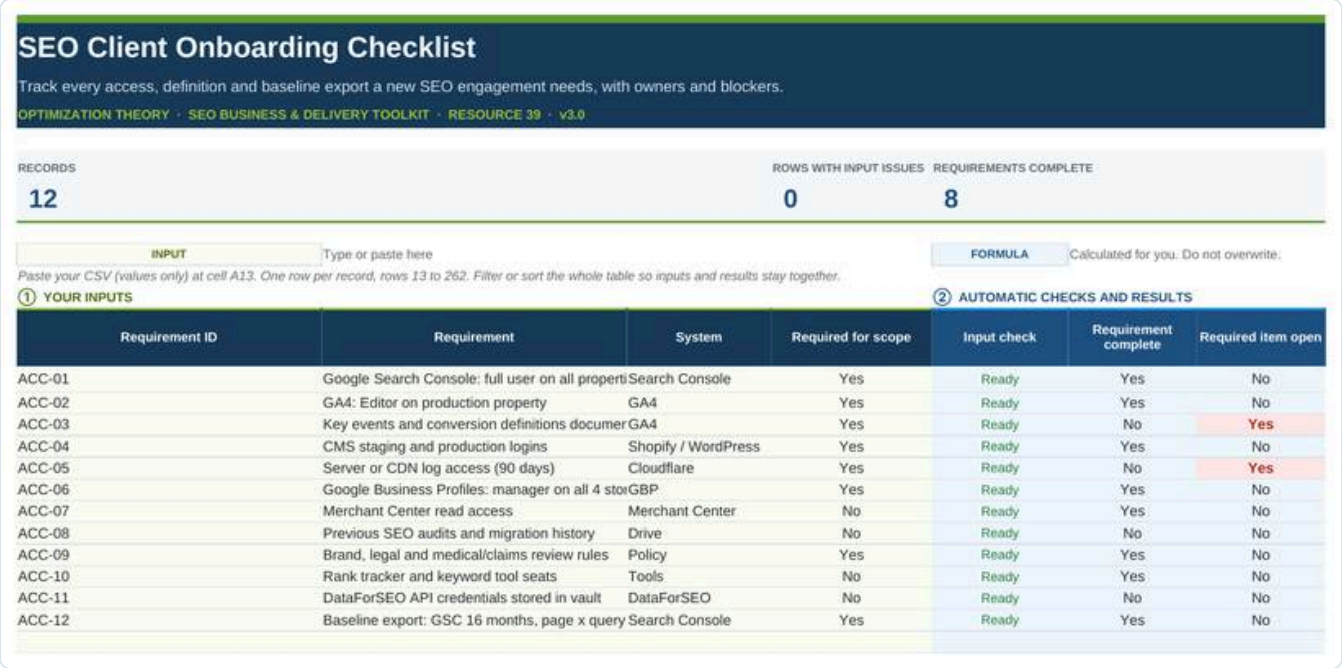
Verify, don't assume

Mark access verified only after you've logged in and checked. Record evidence.

4

Escalate blockers

Required items with blockers go to the kickoff agenda.



SEO Client Onboarding Checklist

Track every access, definition and baseline export a new SEO engagement needs, with owners and blockers.

OPTIMIZATION THEORY · SEO BUSINESS & DELIVERY TOOLKIT · RESOURCE 39 · v3.0

RECORDS	ROWS WITH INPUT ISSUES	REQUIREMENTS COMPLETE
12	0	8

INPUT Type or paste here — FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS — ② AUTOMATIC CHECKS AND RESULTS

Requirement ID	Requirement	System	Required for scope	Input check	Requirement complete	Required item open
ACC-01	Google Search Console: full user on all properti	Search Console	Yes	Ready	Yes	No
ACC-02	GA4: Editor on production property	GA4	Yes	Ready	Yes	No
ACC-03	Key events and conversion definitions documer	GA4	Yes	Ready	No	Yes
ACC-04	CMS staging and production logins	Shopify / WordPress	Yes	Ready	Yes	No
ACC-05	Server or CDN log access (90 days)	Cloudflare	Yes	Ready	No	Yes
ACC-06	Google Business Profiles: manager on all 4 sto	GBP	Yes	Ready	Yes	No
ACC-07	Merchant Center read access	Merchant Center	No	Ready	Yes	No
ACC-08	Previous SEO audits and migration history	Drive	No	Ready	No	No
ACC-09	Brand, legal and medical/claims review rules	Policy	Yes	Ready	Yes	No
ACC-10	Rank tracker and keyword tool seats	Tools	No	Ready	Yes	No
ACC-11	DataForSEO API credentials stored in vault	DataForSEO	No	Ready	No	No
ACC-12	Baseline export: GSC 16 months, page x query	Search Console	Yes	Ready	Yes	No

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

This is a sign-off workflow. DataForSEO responses are the evidence you attach; the human checks stay manual by design.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 39 --csv --input my-filled.csv --output my
-inputs.csv
```

Fills automatically	You add
Source reference (audit trail)	Requirement ID, Requirement, System, Required for scope, Access verified, Owner, Verification evidence, Open blocker

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

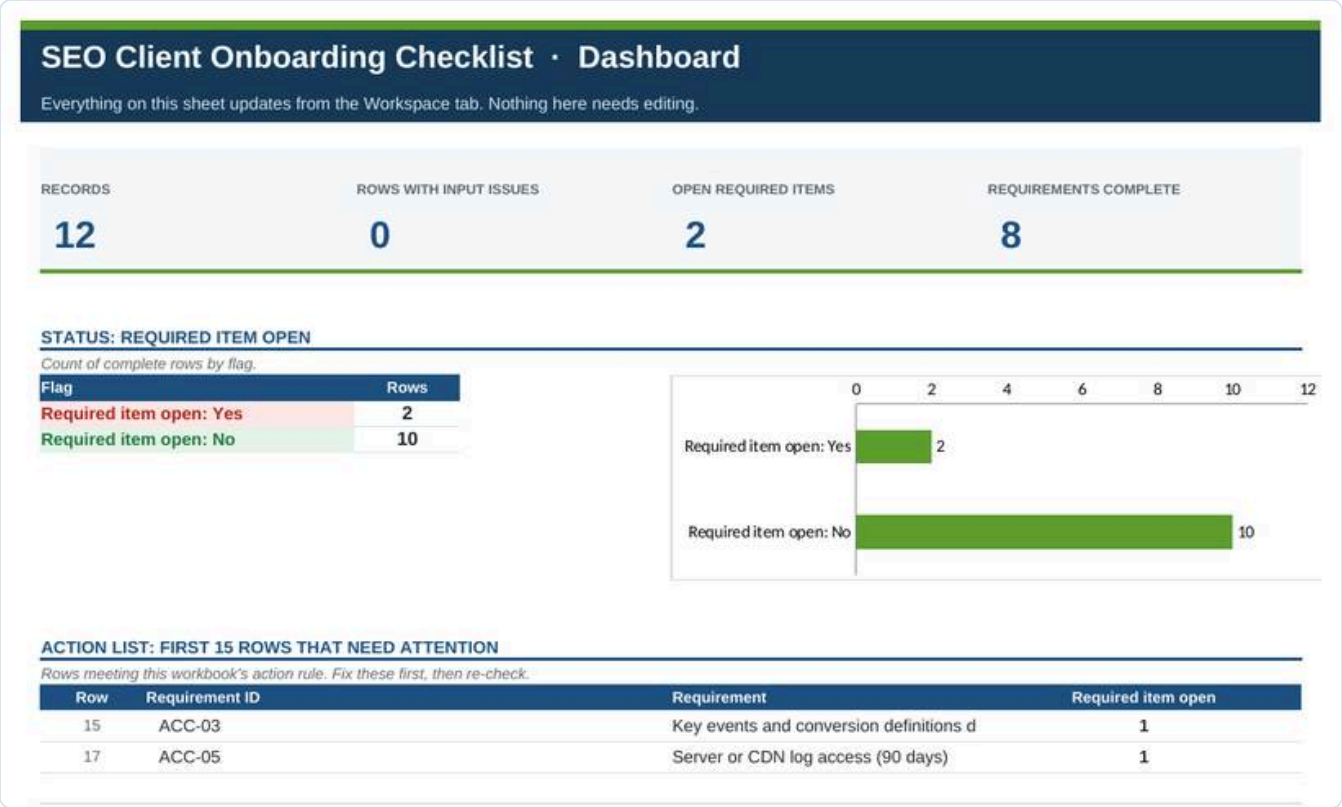
CSV field	Column	Meaning and rule	Typical source
`requirement_id`	Requirement ID	Stable onboarding requirement identifier.	Your records or manual review
`requirement`	Requirement	Specific access or discovery acceptance condition.	Your records or manual review
`system`	System	Source system or business owner.	Your records or manual review
`required`	Required for scope	1 when needed for the agreed engagement. 1 = Yes, 0 = No.	Your records or manual review
`access_verified`	Access verified	1 after the requested access or evidence is actually usable. 1 = Yes, 0 = No.	Your records or manual review
`owner`	Owner	Person accountable for the next action.	Your records or manual review
`evidence`	Verification evidence	Link to a permission check or approved business record. Never include passwords. Optional.	Your records or manual review
`blocker`	Open blocker	Specific missing item or dependency. Enter NONE when resolved.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 12 example rows.

12	0	2	8
Records	Rows with input issues	Open required items	Requirements complete

Two required items are still open in the example: conversion definitions waiting on finance, and server log access that isn't enabled. Both block meaningful strategy work.



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Access is complete only when it works for the needed property, scope and data range.

Limits. This is an evidence workflow. DataForSEO supplies independent crawl and market context, not private account access.

Mistakes to avoid

Accepting 'you have access' without checking. Permissions are often lower than promised. Log in and verify.

Skipping definitions. Without agreed conversion definitions, every report becomes a debate.

Not capturing baselines early. Export 16 months of Search Console data on day one. It disappears after that window.

Tips from the field

Use the 90-day roadmap once onboarding closes.

Keep this checklist as part of your statement of work.

Re-run access checks quarterly; people and permissions change.

Questions people ask

What do I need from a new SEO client?

Search Console and analytics access, CMS access, conversion definitions, previous audits, brand and legal guidelines, Business Profile access for local businesses and baseline data exports.

What level of Search Console access do SEOs need?

Full user is usually enough for analysis. Owner is needed for some settings like change of address.

How long should SEO onboarding take?

One to two weeks when access is prepared in advance. Blockers usually come from permissions and definitions.

Why export Search Console data at the start?

Search Console keeps 16 months of data. Exporting early preserves the baseline for later comparisons.

Templates that work well with this one

SEO Roadmap Template

Sequence 90 days of SEO and GEO work by weighted opportunity per hour, dependencies and acceptance criteria.

SEO Migration Checklist

Every pre-launch, launch-day and post-launch control with an owner, evidence and automatic launch-blocker flags.

SEO Forecast Template

Project added clicks and contribution per keyword cluster with CTR, attainment and seasonality you can defend.

Technical SEO Prioritization Template

Turn a technical SEO audit into a ranked fix queue by recovered clicks, profit and profit per hour of dev time.

AI Referral Traffic Tracker

Measure sessions, conversion rate and contribution per session from ChatGPT, Perplexity, Gemini, Copilot and Claude.

Brand Entity Consistency Audit

Compare your official brand facts with Wikidata, LinkedIn, GBP, Yelp and more, and log every correction request.

Read the full tutorial online: **optimizationtheory.com/download-view/seo-onboarding-checklist/**
Get all six templates in the **SEO Business & Delivery Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.

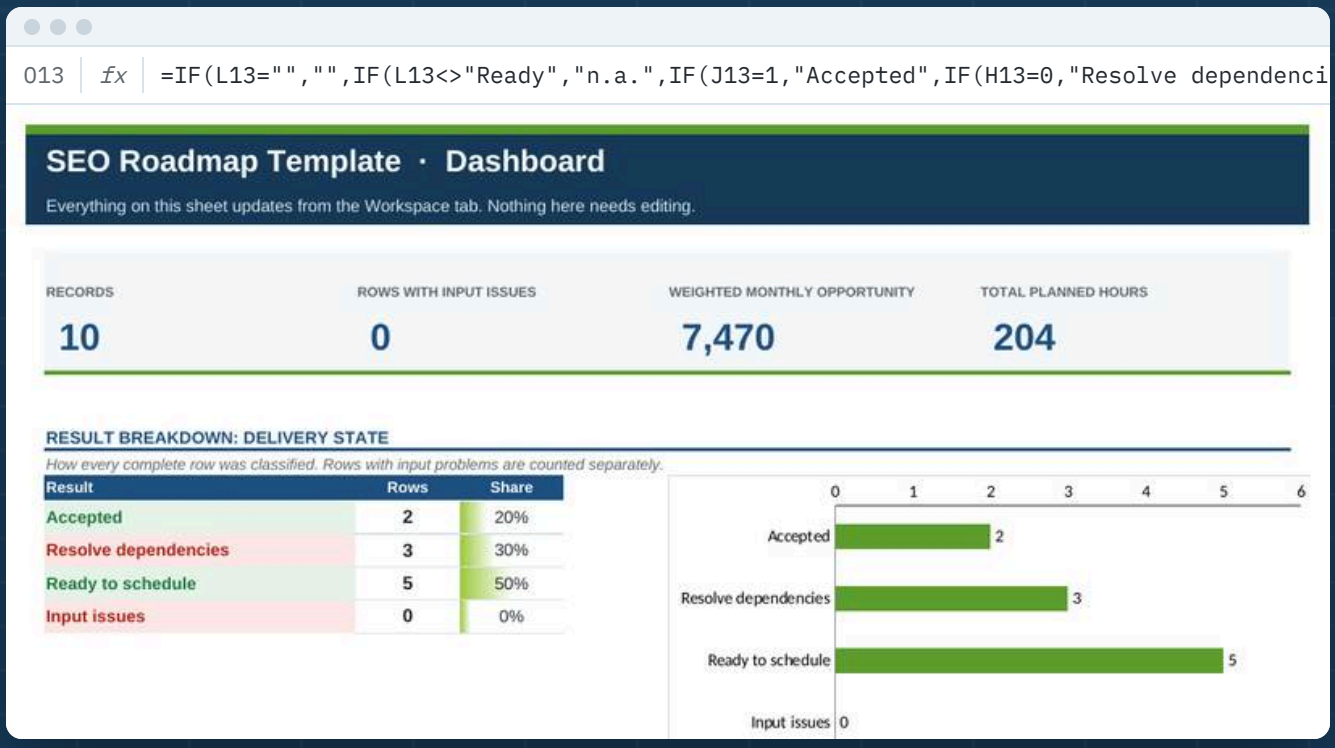
OptimizationTheory.com

SEO Business & Delivery Toolkit, resource 40

SEO Roadmap Template

Sequence 90 days of SEO and GEO work by weighted opportunity per hour, dependencies and acceptance criteria.

Built for the DataForSEO API: On-Page API



Field guide, v3.0, November 2026

Jourdan Rombough, optimizationtheory.com

What this template decides

What to do in each 30-day phase, ranked by weighted monthly opportunity per hour, which initiatives are blocked by dependencies, and what 'done' means for each.

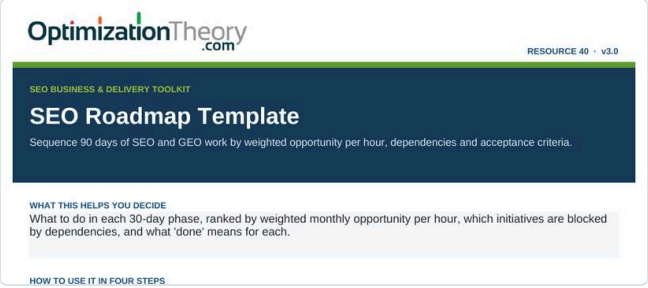
Most SEO roadmaps are lists of good ideas with dates attached. They don't say which idea is worth the most per hour, what has to happen first, or how anyone will know an initiative is finished.

This SEO roadmap template plans 90 days of SEO and GEO work. Each initiative has a phase, owner, hours, estimated monthly profit and confidence. It calculates weighted monthly opportunity and opportunity per hour, and tracks each initiative to Accepted only when its acceptance criteria are met, flagging anything with unresolved dependencies.

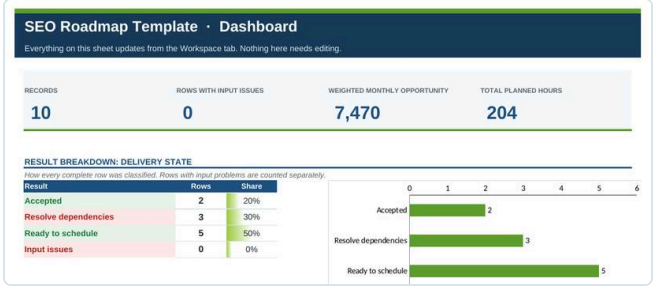
Who it's for

- SEO leads planning a quarter
- Consultants delivering a 90-day plan to a client
- Teams combining technical, content and GEO work
- Leaders who want a plan with clear acceptance criteria

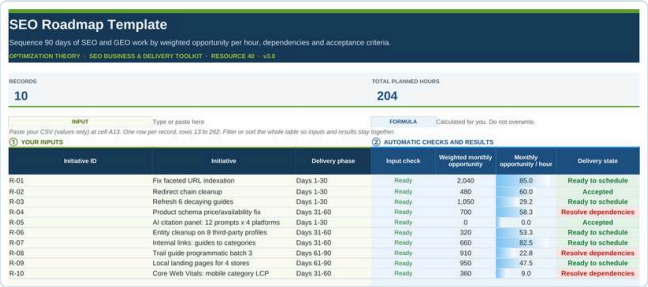
What's in the workbook



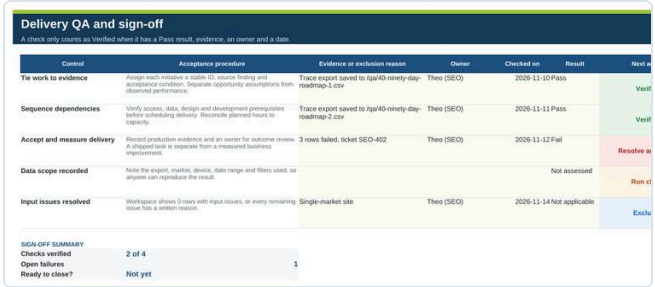
Start Here. Purpose, four-step setup and colour key.



Dashboard. KPIs, charts, Top 10 and an automatic action list.



Workspace. The working table, room for 250 rows.



Delivery QA. Evidence, owner and date for each validation step.

How the calculation works

Weighted monthly opportunity = monthly profit × confidence. Opportunity per hour = weighted opportunity ÷ hours. Delivery state = Accepted if accepted, Resolve dependencies if dependencies aren't ready, otherwise Ready to schedule.

The key formula, as written in the workbook

```
=IF(L13="","",IF(L13<>"Ready","n.a.",IF(J13=1,"Accepted",IF(H13=0,"Resolve dependencies","Ready to schedule"))))
```

Result column	Plain-English formula	What it tells you
Weighted monthly opportunity	Monthly contribution hypothesis × Confidence factor	Planning opportunity after an uncertainty haircut.
Monthly opportunity / hour	IF(Planned hours=0,"n.a.",Weighted monthly opportunity ÷ Planned hours)	Comparable planning value per hour.
Delivery state	IF(Delivery accepted=1,"Accepted",IF(Dependencies ready=0,"Resolve dependencies","Ready to schedule"))	Acceptance is recorded independently from planned effort.

The results you'll see

Accepted | Resolve dependencies | Ready to schedule

Green means the row meets the checks, red means fix it first, amber needs a human review and blue marks an opportunity. Rows with missing or out-of-range inputs show in the Input check column and are left out of the results until fixed.

How to use it, step by step

1

List initiatives from your audits

Pull the top items from the technical prioritizer, content audit, forecast and GEO templates.

2

Estimate value and confidence

Monthly profit if it works, and how confident you are (0 to 1).

3

Write acceptance criteria

A testable definition of done for each initiative.

4

Phase by value and dependencies

Early phases get high value per hour with no blockers. Resolve dependencies before scheduling.



SEO Roadmap Template

Sequence 90 days of SEO and GEO work by weighted opportunity per hour, dependencies and acceptance criteria.

OPTIMIZATION THEORY · SEO BUSINESS & DELIVERY TOOLKIT · RESOURCE 40 · v3.0

RECORDS 10

TOTAL PLANNED HOURS 204

INPUT Type or paste here

FORMULA Calculated for you. Do not overwrite.

Paste your CSV (values only) at cell A13. One row per record, rows 13 to 262. Filter or sort the whole table so inputs and results stay together.

① YOUR INPUTS

② AUTOMATIC CHECKS AND RESULTS

Initiative ID	Initiative	Delivery phase	Input check	Weighted monthly opportunity	Monthly opportunity / hour	Delivery state
R-01	Fix faceted URL indexation	Days 1-30	Ready	2,040	85.0	Ready to schedule
R-02	Redirect chain cleanup	Days 1-30	Ready	480	60.0	Accepted
R-03	Refresh 6 decaying guides	Days 1-30	Ready	1,050	29.2	Ready to schedule
R-04	Product schema price/availability fix	Days 31-60	Ready	700	58.3	Resolve dependencies
R-05	AI citation panel: 12 prompts x 4 platforms	Days 1-30	Ready	0	0.0	Accepted
R-06	Entity cleanup on 8 third-party profiles	Days 31-60	Ready	320	53.3	Ready to schedule
R-07	Internal links: guides to categories	Days 31-60	Ready	660	82.5	Ready to schedule
R-08	Trail guide programmatic batch 3	Days 61-90	Ready	910	22.8	Resolve dependencies
R-09	Local landing pages for 4 stores	Days 61-90	Ready	950	47.5	Ready to schedule
R-10	Core Web Vitals: mobile category LCP	Days 31-60	Ready	360	9.0	Resolve dependencies

The Workspace tab with the worked example. Lime cells are inputs; blue cells are formulas.

Fill it with DataForSEO

This template is built to run on **DataForSEO On-Page API**: a crawl of your site: URLs, status codes, canonicals, inlinks and sitemap membership.

DataForSEO supplies the URL or query list and the audit trail; you add the measurements listed below.

1. Request the data

```
POST https://api.dataforseo.com/v3/on_page/task_post
[
  {
    "target": "yourdomain.com",
    "max_crawl_pages": 1000
  }
]
```

Post the crawl task, wait for it to finish, then request on_page/pages with {"id": "<task id>", "limit": 1000} and save that response.

2. Save the full JSON response

Save the complete response, not just the task ID, next to the template folder.

3. Convert it to the input CSV

The script in the Automation folder runs offline: no API call, no credentials.

```
python3 Automation/dataforseo_import.py import --template 40 --input response.json --output my-inputs.csv
```

Fills automatically	You add
Source reference (audit trail)	Initiative ID, Initiative, Delivery phase, Owner, Planned hours, Monthly contribution hypothesis, Confidence factor, Dependencies ready, Acceptance condition, Delivery accepted

Source reference fills automatically with the task ID, endpoint, location, language, device and snapshot time, so every row is traceable. Paste the finished CSV at Workspace cell A13. Estimate the cost first with the DataForSEO Cost Calculator (template 38).

Input dictionary

Keep the CSV columns in this order and paste values at Workspace cell A13. A missing observation stays blank; use 0 only for a measured zero or a verified No.

CSV field	Column	Meaning and rule	Typical source
`initiative_id`	Initiative ID	Stable initiative or workstream identifier.	Your records or manual review
`initiative`	Initiative	Specific change with an observable acceptance condition.	Your records or manual review
`phase`	Delivery phase	Days 1-30, Days 31-60 or Days 61-90.	Your records or manual review
`owner`	Owner	Person accountable for the next action.	Your records or manual review
`hours`	Planned hours	Expected delivery effort.	Your records or manual review
`monthly_profit`	Monthly contribution hypothesis	Explicit monthly contribution opportunity if the initiative succeeds.	Your records or manual review
`confidence`	Confidence factor	Analyst planning haircut, not statistical confidence. Decimal, 0.08 = 8%.	Your records or manual review
`dependencies_ready`	Dependencies ready	1 only after required access, data and predecessor changes are available. 1 = Yes, 0 = No.	Your records or manual review
`acceptance`	Acceptance condition	Specific evidence needed to accept delivery.	Your records or manual review
`accepted`	Delivery accepted	1 only after the acceptance condition is verified. 1 = Yes, 0 = No.	Your records or manual review
`source_ref`	Source reference	Task ID, export filename and observation scope. Retain the untouched source response separately. Optional.	DataForSEO: source_ref

The worked example

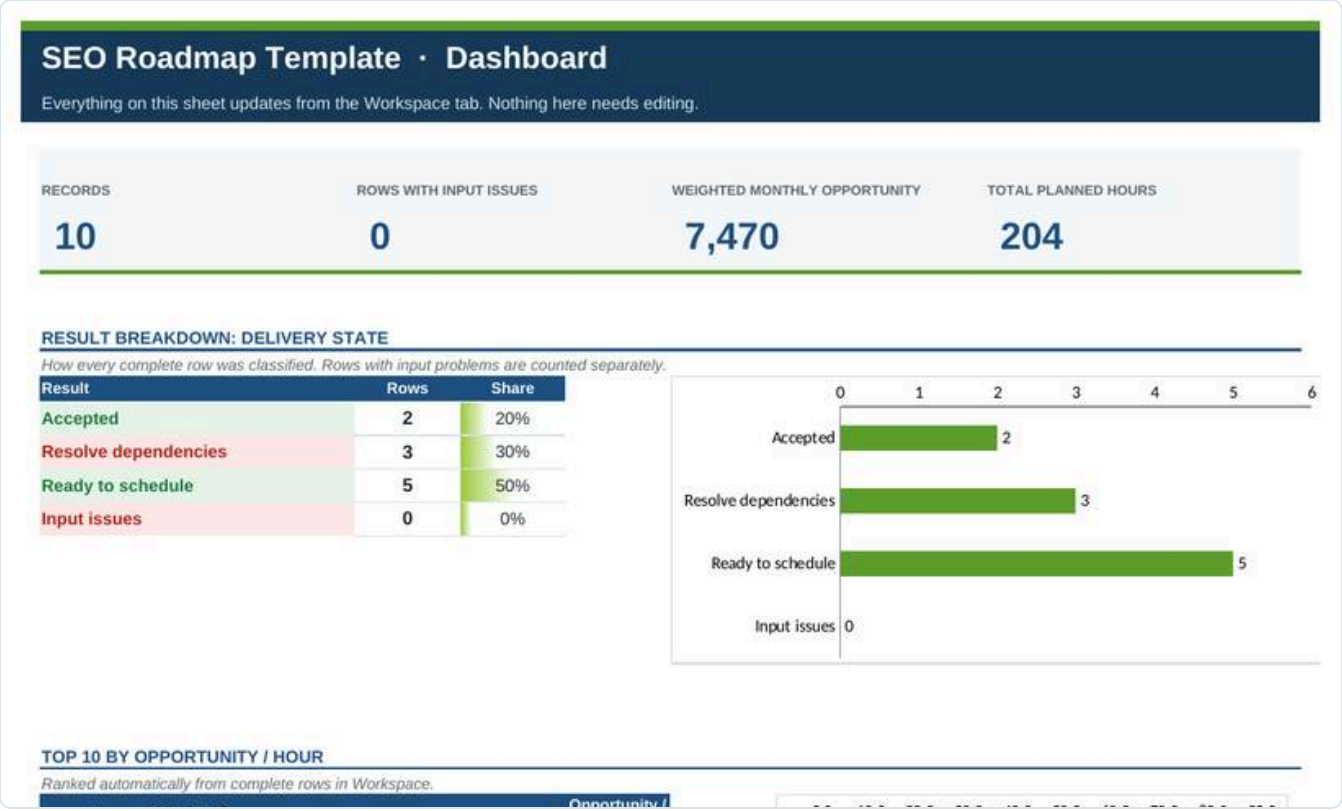
Every workbook ships filled with data from Northbeam Outdoor, a fictional outdoor-gear retailer. This one has 10 example rows.

10	0	7,470	204
Records	Rows with input issues	Weighted monthly opportunity	Total planned hours

Fixing faceted URL indexation and adding guide-to-category links offer the best value per hour. Redirect cleanup is already accepted, while product schema, the trail-guide batch and the Core Web Vitals work are blocked on dependencies.

Top 10 by opportunity / hour

#	Initiative ID	Opportunity / hour
1	R-01	85.0
2	R-07	82.5
3	R-02	60.0
4	R-04	58.3
5	R-06	53.3



The Dashboard updates automatically from the Workspace tab.

Reading the result honestly

Keep the roadmap small enough for the team to deliver. Link business hypotheses to the assumptions in the relevant calculator.

Limits. DataForSEO informs the evidence. Owners, capacity, economic hypotheses and delivery acceptance are human inputs.

Mistakes to avoid

No acceptance criteria. Without a definition of done, initiatives drift and never close.

Ignoring dependencies. Scheduling blocked work creates fake progress and missed dates.

Front-loading big projects. Early wins with high value per hour build trust for the larger work.

Tips from the field

Review the roadmap every two weeks and update accepted items.

Feed accepted outcomes into the ROI calculator.

Start with the onboarding checklist so the roadmap isn't built on missing data.

Questions people ask

What should an SEO roadmap include?

Prioritized initiatives, owners, effort, expected impact, dependencies, timelines and acceptance criteria.

How do you prioritize an SEO roadmap?

Rank initiatives by expected value per hour of effort, adjusted for confidence, and sequence around dependencies.

Why 90 days?

It's long enough to deliver meaningful work and short enough to re-plan based on results.

Can I include GEO work in an SEO roadmap?

Yes. AI visibility initiatives like prompt panels, entity cleanup and answer evidence audits fit the same prioritization.

Templates that work well with this one

SEO Client Onboarding Checklist

Track every access, definition and baseline export a new SEO engagement needs, with owners and blockers.

Technical SEO Prioritization Template

Turn a technical SEO audit into a ranked fix queue by recovered clicks, profit and profit per hour of dev time.

SEO Forecast Template

Project added clicks and contribution per keyword cluster with CTR, attainment and seasonality you can defend.

Content Audit Template

Score every URL by lost clicks, conversions and links, choose keep, refresh, merge or retire, and catch the risky calls.

AI Prompt Research Template

Turn real customer tasks and keywords into a weighted prompt panel for ChatGPT, Perplexity, Gemini and AI Overviews.

SEO ROI Calculator

Turn incremental sessions into revenue, contribution, net return and a break-even month against real SEO costs.

Read the full tutorial online: **optimizationtheory.com/download-view/seo-roadmap-template/**
Get all six templates in the **SEO Business & Delivery Toolkit**, or all 40 in the **Complete SEO & GEO Toolkit**.