

# PaymentEasy — Sample Audit

**Subject:** PaymentEasy (anonymized B2B SaaS — payment reconciliation for fintech ops teams)

**Audit type:** Full conversion + SEO + technical site review

**Scope:** 14 public pages — homepage, pricing, features, blog top 5, docs, signup flow

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**Note:** This is a real audit methodology applied to an anonymized composite of three real B2B SaaS sites. The structure, findings, and prioritization shown here is exactly what every paying customer receives.

## Executive summary

### The headline

PaymentEasy is well-built but is leaving meaningful conversion on the table on the homepage and pricing page. We identified **47 distinct issues** across technical SEO, page speed, conversion, and content.

**12**

QUICK WINS · ≤ 1 HOUR EACH

**18**

MEDIUM EFFORT · 1-8 HOURS

**17**

LARGER PROJECTS · MULTI-DAY

If only the 12 quick wins are implemented, we estimate (based on industry benchmarks for similar findings):

- +18% to +28% improvement on homepage → signup conversion
- +12% improvement in mobile bounce rate

- **+3 to +7 additional indexed pages on Google within 30 days**

We make no guarantee on these numbers — they're indicative ranges based on documented impact of similar fixes elsewhere. **Implementation determines actual results.**

## The 5 most important findings

1. **Hero copy talks about features, not outcomes.** The H1 is "Smart Payment Reconciliation Software." It should be outcome-led ("Cut your month-end close by 4 days") to lift signup conversion 8–15%.
2. **Mobile homepage loads in 4.2s on 5G.** This costs ~30% of mobile visitors before they see anything. Cause: a 2.8MB unoptimized hero animation.
3. **The pricing page lacks an FAQ.** 70%+ of B2B buyers have unanswered questions at the pricing stage; missing FAQ correlates with abandonment. Adding 8 FAQ items typically lifts pricing→trial conversion 12–22%.
4. **No structured data anywhere.** No Organization or FAQ schema. Lost AI-search visibility (ChatGPT, Perplexity) and reduced rich snippet eligibility.
5. **CTA buttons say "Get Started"** — generic. Specific CTAs ("Start your 14-day trial — no card required") consistently outperform generic ones by 30–60% on click-through.

## Recommended sequence

**Week 1 — quick wins, minimal dev work needed:** Hero copy rewrite · CTA copy variants · FAQ on pricing page · Add Organization + FAQ schema.

**Week 2 — modest dev work:** Mobile hero optimization · Mobile form review · OG image fixes · Speed cleanup of homepage.

**Week 3 — content:** Top 3 missing topical clusters from the blog · 5 internal-linking improvements.

**Week 4 — scale:** Implement competitive content gaps · Schema across product pages · Long-tail SEO targeting.

# Section 1 — AEO and Technical SEO

## 1.1 Crawlability & indexation

### WHAT WORKS

- ✓ robots.txt is present and well-structured
- ✓ XML sitemap is auto-generated and submitted
- ✓ No crawl traps detected
- ✓ Canonical tags present on all template-driven pages

### ISSUES

SEVERITY	FINDING	FIX	EFFORT	IMPACT
MED	7 pages return 200 but are not in sitemap (orphan pages)	Add to sitemap.xml or no-index	1h	2/5
MED	/blog/category/general/ is indexed but adds zero value	No-index it	5min	2/5
HIGH	Trailing slash inconsistency: /pricing and /pricing/ both resolve	Pick one canonical, 301 the other	30min	4/5
LOW	2 broken internal links from old blog posts	Fix or remove	15min	1/5

## 1.2 Answer-engine visibility (AEO)

I ran 30 buyer-intent prompts across ChatGPT, Perplexity, and Gemini — the same prompts a fintech ops lead would type when shortlisting reconciliation tools. Examples:

- "What's the best automated payment reconciliation software for fintech?"
- "How do I reconcile Stripe payouts with QuickBooks?"
- "PaymentEasy vs HighRadius vs Trovata"
- "Month-end close software for fintech operations teams"

## CITATION MATRIX

PROMPT CATEGORY	CHATGPT	PERPLEXITY	GEMINI	COMPETITOR CITED MOST
Category ("best X software")	Not cited	Not cited	Not cited	HighRadius (G2)
Integration ("Stripe → QuickBooks")	Not cited	Not cited	Not cited	Synder (own blog)
Comparison ("X vs Y")	Not cited	Cited 1×	Not cited	Trovata (own site)
Use-case ("month-end close fintech")	Not cited	Not cited	Not cited	Numeric (G2)
Branded ("PaymentEasy review")	Cited	Cited	Cited	—

**Share of voice:** PaymentEasy 7%, top 3 competitors combined 64%. PaymentEasy only surfaces when someone already knows the brand — meaning answer engines are not currently a source of new pipeline.

### ROOT CAUSE – FROM OUR RESEARCH, WHERE THE ENGINES PULL CITATIONS FROM

- **47%** from G2 and Capterra review pages → PaymentEasy has 14 G2 reviews; HighRadius has 231
- **31%** from comparison and alternatives articles → PaymentEasy has zero
- **18%** from the vendor's own blog (long-form, problem-led) → PaymentEasy's blog is product-update led, which engines rarely cite
- **4%** from structured data / schema → not the lever it's often sold as. A [2026 Ahrefs study of 1,885 pages](#) found adding schema produced no meaningful citation lift. Worth doing for rich snippets and knowledge-panel eligibility, but don't expect AEO impact from it alone.

**Effort:** ~7h for the strategy doc and prompt list · effective in-app review prompt system ~5h to build · blog update ~12–20h per post. **Impact:** 5/5

## 1.3 Core Web Vitals (mobile)

METRIC	CURRENT	THRESHOLD	STATUS
LCP (Largest Contentful Paint)	3.8s	< 2.5s	✖ Fails
INP (Interaction to Next Paint)	285ms	< 200ms	⚠ Needs Improvement
CLS (Layout Shift)	0.18	< 0.1	⚠ Needs Improvement

## Root cause analysis:

- **LCP failure** caused by `/assets/hero-animation.webm` (2.8MB) loading in critical render path. Recommended fix: replace the animation with a static poster image on mobile via media query ( `@media (max-width: 768px)` ) — the animation adds no information at small sizes and the file is the LCP element. Secondary: keep the animation on desktop but re-encode to AV1 (typically 40–50% smaller than VP9 WebM at equal quality) and lazy-load it below the fold.
- **CLS failure** caused by webfont swap (Inter loads after 800ms causing layout shift). Recommended fix: preload font with `<link rel="preload">` and use `font-display: optional`.
- **INP delays** are minor — caused by analytics scripts firing in main thread. Defer non-critical JS.

## Section 2 — Conversion (Homepage)

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### 2.1 Above-the-fold analysis

#### Current hero:

H1: "Smart Payment Reconciliation Software"

Subtitle: "AI-powered automation for finance teams"

CTA: "Get Started"

#### Problems:

1. **H1 is feature-led, not outcome-led.** "Smart" tells me nothing.
2. **Subtitle adds no information.** "AI-powered automation" is now a Mad-Lib template every B2B uses.
3. **CTA is generic.** "Get Started" is the most-tested-and-most-replaced CTA in B2B SaaS.

#### Recommended rewrite:

H1: "Close your month 4 days faster, automatically."

Subtitle: "PaymentEasy ingests your payment data from Stripe, your bank (via Plaid), and your ERP, and reconciles 95% of transactions without your team touching them."

CTA: "Start your 14-day trial — no card required"

**Expected impact:** 8–15% lift in homepage→signup conversion based on documented similar rewrites.

## Section 3 — Conversion (Pricing Page)

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### 3.1 Plan comparison

3 plans (Starter \$49, Pro \$149, Enterprise "Talk to us"). Layout is clean. Issues:

- **No "most popular" callout** on the Pro plan. Adding one shifts ~30% of buyers from Starter to Pro (proven across hundreds of A/B tests).
- **Feature comparison uses checkmarks but no hierarchy.** Bold the upgrade-driving features ("Custom roles", "SSO", "Dedicated CSM").
- **No annual toggle / discount.** ~70% of B2B SaaS now offers 15–20% annual discount. PaymentEasy doesn't.

### 3.2 Missing FAQ

The pricing page has no FAQ section. This is the #1 finding I see on B2B SaaS pricing pages.

**Why it matters:** When a buyer is on the pricing page, they're 5–10 questions deep. If those questions aren't answered on the page, ~50% of them bounce or stall.

#### Recommended FAQ content (8 items):

1. Can I cancel anytime?
2. What counts as a "transaction"?
3. Is there a setup fee?
4. Can I upgrade/downgrade plans mid-cycle?
5. What happens to my data if I cancel?
6. Do you offer a free trial?
7. What about volume pricing for >10K transactions?
8. Are SOC 2 / GDPR features available on all plans?

**Expected impact:** Adding FAQ to pricing page lifts trial signup 12–22% based on documented A/B tests.

## Section 4 — Content & SEO

### 4.1 Content gap vs. top 5 competitors

I analyzed top-ranking content for 30 high-intent keywords competitors rank for. PaymentEasy ranks for **none** and has no content for **22 of 30**:

KEYWORD	SEARCH VOLUME	COMPETING PAGES	HAS PAGE?
"automated payment reconciliation"	2,400/mo	3 competitors	✗
"stripe to quickbooks reconciliation"	1,900/mo	4 competitors	✗
"what is payment reconciliation"	8,100/mo	5 competitors	✗
"payment matching software"	720/mo	2 competitors	✗
"ACH reconciliation software"	590/mo	2 competitors	✗

**Top 3 priority content gaps** (commercial-intent first — AI Overviews now intercept most "what is" traffic, so top-of-funnel (TOFU) education is deprioritized):

1. "Automated payment reconciliation" (commercial, 2,400/mo). 2,000-word category landing page with product comparison, pricing context, and a clear CTA.
2. "Stripe to QuickBooks reconciliation guide" (high-intent, 1,900/mo). 2,200-word integration-led page — buyers searching this are evaluating, not learning.
3. "PaymentEasy vs. [top 3 competitors]" comparison / alternatives page (bottom-funnel, highest-converting intent in B2B SaaS). 2,000 words: feature matrix, pricing transparency, switching cost, and ideal-customer-fit per tool. Buyers searching competitor names are ready to choose — owning this SERP is non-negotiable.

**Note on the 8,100/mo "what is payment reconciliation" gap:** Volume looks attractive but effective CTR has collapsed under AI Overviews and LLM answers (ChatGPT, Perplexity, Gemini). Write it as supporting TOFU content optimized for citation in AI answers — not as a top-3 conversion bet. Its job is topical authority and internal linking into the three pages above, not direct trial signups.

## Section 5 — Sign-up flow

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### 5.1 The funnel

Homepage → "Get Started" → Signup form → Email verification → Onboarding wizard.

- Homepage → click CTA: ~6% (industry: 4–8%)
- CTA → signup completion: **~46%** (industry: 50–65%) — under-performing
- Signup → email verified: ~70% (fine)
- Email verified → first action: ~52% (fine)

### 5.2 Signup form analysis

Current form has 8 fields. **Too many.** B2B SaaS norm in 2026: 3 fields max for trial signup. Defer the rest to onboarding.

**Recommended:** email + password only (or "Continue with Google"). 2 fields. **Expected impact:** Reducing form fields from 8 to 2 typically lifts completion 30–50% on B2B SaaS trial flows.

## Section 6 — Implementation roadmap (30 days)

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### Week 1 — minimal dev work needed (quick wins)

- Rewrite hero H1 and subtitle (1h)
- Replace generic CTA copy across the site (1h)
- Add FAQ section to pricing page (3h)
- Add Organization + FAQPage schema (2h)
- Add "Most Popular" badge on Pro plan (15min)
- Add "annual" toggle to pricing (4h)
- No-index empty category pages (15min)
- Add `dateModified` to blog posts (1h)
- Replace 4 stock photos in top blog posts (2h)
- Fix mobile CTA button height to 44px (15min)

**Week 1 effort: ~14 hours total.**

## **Weeks 2-4**

Modest dev work, then content sprint, then scale. Full week-by-week plan is in the deliverable.  
(This sample shows Week 1 only.)

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**— Clement**

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