CRO Audits

3 Types:

- **Paid CRO Audits** - clients have paid us to complete the audit as a standalone project or as part of a larger scope
  - Usually run through the CRO Audits asana board
  - Paige manages + tasks out to Nash to assign to GLs
  - Usually need a custom deck + have a specific focus
    - Example

  - GLs present
- **New Biz (Ned)** - Ned's leads that ONLY want a CRO audit no other channels
  - Run through the CRO Audits asana board
  - Paige manages + tasks out to 2 admin people who complete the template decks for Ned who reviews + presents
    - Issue: B2B/Lead Gen audits - not as clear cut - assigned back to Sarah before Ned to help wrap up the slides
  - All audits saved in this folder
    - Ecomm Template
    - b2b/lead Template
- **New Biz Cross Channel Appraisals** - new biz opportunities in which CRO is part of the larger channel mix
  - Run through the Appraisal 2.0 asana board
  - Tasks are assigned to Paige for visibility and she tasks out.
  - Made a new template which ideally doesn't require CRO GLs to complete
    - Template slides (funnel + forecast)
    - Example

Notes:

- Audits and appraisals are used interchangeably
- We need to ensure if someone makes a deck it is shared w/ the entire company and saved in the CRO audits folder. This way if someone is out anyone can jump in + access the deck

Appraisal Process

1. Appraisal Notification + Staffing:

- **Responsibility**: Paige FauntLeRoy
- **Channel**: Direct message to Nash with Sarah Makinaci and Alex James in it
- **Action**:
  - Paige will notify Nash of the appraisal by tagging her in the Asana task and sending the conversation to the appraisal Slack channel.
  - Nash to review the 'Appraisals' tab in this sheet and determine which GL can handle this, considering the bandwidth within each pod.
  - Nash to assign the GL to the Asana task and add them on the slack channel.
- **Details**: Follow the Template Slides to complete the Appraisal.

2. Adding the CRO hours to BP

- **Responsibility**: AD/GL assigned to create the Appraisal
- **Channel**: Appraisal Channel
- **Action**: CRO Lead to add in the CRO hours to the BP. The Sales Lead will share the BP so that the CRO Lead can add the “CRO with Dev” snippet as the default.
- **Details**: Steps to Add the snippet on the BP:
  1. Click on the “Strategies & Pricing” tab.
  2. Select "Add Strategy."
  3. Search for and select the “CRO with Dev” snippet.
  4. Click "Next" at the bottom right and save it.

Paid CRO Audit Process

1. Audit Sale Notification + Staffing

- **Responsibility**: Sales Team
- **Channel**: #incomingaccounts
- **Action**: Tag - Nash to Notify the CRO department immediately upon sale of a paid audit.
- **Details**: Follow template, Include the audit details, including the price, which determines the number of CRO experiment ideas (10-20). The assignment should be done as soon as the audit sale is confirmed to ensure a prompt start.

2. Group Ideation Session

- **Responsibility**: All Growth Leads
- **Action**: Schedule and conduct a group brainstorming session.
- **Details**:
    - Schedule the session within 1-2 days of receiving the audit sale notification.
    - All growth leads participate to generate a list of 10-20 CRO experiment ideas.
    - Focus on key metrics such as conversion rate, average order value, lead generation form submissions, etc.
    - Ensure a collaborative environment to facilitate quick and creative idea generation.

3. Compilation of Audit

- **Responsibility**: Assigned Growth Lead or Growth Lead in Training
- **Action**: Compile the audit report.
- **Details**:
    - Use the ideas generated in the group ideation session.
    - Ensure each idea is clearly explained, with potential impacts on key metrics.
    - Complete the audit report within the standard turnaround time (1 week or 1.5 weeks if multiple audits are being conducted).

4. Quality Assurance

- **Responsibility**: Alex Zamora, Nashla Akel, AD/AM (if audit is compiled by a senior growth lead)
- **Action**: Review the compiled audit report.
- **Details**:
    - Ensure all ideas are relevant and feasible.
    - Check for clarity, accuracy, and completeness.
    - Provide feedback and request revisions if necessary.

5. Client Delivery

- **Responsibility**: Assigned Growth Lead
- **Action**: Present the final audit report to the client.
- **Details**:
    - Ensure the report is delivered within the agreed turnaround time.
    - Schedule a call to discuss the audit and next steps.

6. Follow-Up and Support

- **Responsibility**: AD / Assigned Growth Lead
- **Action**: Provide follow-up support as needed and follow-up for acquiring a CRO Contract

- **Details**:
    - Address any client questions or concerns.
    - Assist with the implementation of the recommended CRO experiments, if required.
    - Monitor the performance of implemented ideas and provide ongoing optimization support.