

Buyer Experience Audit Template

Instructions:

- ☐ Have this template open on one screen, with a browser open on another.
- ☐ Follow through each section, using the attributes to guide your research.
- ☐ Score each attribute between 1 and 5.
 - 1 - non-existent
 - 2 - poor
 - 3 - exists
 - 4 - good
 - 5 - amazing
- ☐ Change the colour of each box depending on the score:
 - 1 and 2 - red
 - 3 - orange
 - 4 and 5 green
- ☐ Use the notes field to describe what you found and why you scored it as you did.
 - For example - on a YouTube channel you might score it 2 and write "only 17 subscribers and last video posted 6 months ago"
- ☐ Once completed, go to the benchmark chart at the end and click "Open Source" to open the Buyer Experience Audit spreadsheet and enter your scores.
- ☐ Go back to the Google Doc and click "Update" on the chart to see your scores benchmarked
- ☐ Write up your recommendations. Having gone through this exercise you should have come to some immediate conclusions about the priorities that will give the quickest impact on revenue.
 - Limit them to three - any more and your message will lose its impact.
- ☐ Write your Executive Summary on the first page, explaining the key findings and recommendations to your senior executives. This will give them the information they need without diving into the detail.
- ☐ Check the flow of the document and add in page breaks where needed.
- ☐ Refresh the table of contents by clicking the refresh button at the top left of the table on the next page.

Good luck, and let me know if you need help.

Charlie

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Executive Summary

[fill this section in last. Use it to describe what you found and your recommendations for priorities that can influence revenue growth fastest.]

I see three priority actions

- ☐ **Action 1.** Describe the action.
- ☐ **Action 2.** Describe the action.
- ☐ **Action 3.** Describe the action.

Audit Overview

Premise

[Describe the set up for the audit. For example "I am a CHRO who wants to improve the way I build and manage my talent pipeline. I will use my own research, peer review and network to understand the challenge I am facing and explore possible solutions.

Audit scope

Company domain	
Website title	
Website description	
Homepage summary	
Targeted segments	
Competitors	

Web Search

When searching the segments we position ourselves in, what do potential buyers find?

	[Segment name]	[Segment name]
Top paid results		
Top organic results		

Owned Content

Website

When buyers do find our website, do we educate them and allow them to research our company and our offering effectively?

Attribute	1-5	Notes
Our website provides clear pricing	3	
Our website provides clear contact information	3	
Our website provides ungated advisory content (diagnostics, calculators, benchmarks)	3	
Our website provides ungated support content	3	
Our website provides a free demo	3	
Our website explains the different licence types	3	
Our website provides links to our partners	3	
Our website provides recent testimonials	3	
Our website provides links to LinkedIn	3	
Our website provides links to Twitter	3	

Events

As a buyer can I register for upcoming or past events to learn about the company, the product and how other companies are using it?

Attribute	1-5	Notes
We have upcoming in person events	3	
We have upcoming virtual events	3	
We have ungated recordings of previous events	3	

eBooks

As a buyer can I read ungated long-form content to learn about the company, the product and how other companies are using it?

Attribute	1-5	Notes
We have ungated ebooks	3	
Our ebooks provide actionable content	3	
Our ebooks are read	3	
Our ebooks are shared	3	

Podcast

As a buyer can I listen to ungated audio content to learn about the company, the product and how other companies are using it?

Attribute	1-5	Notes
We have a company podcast	3	
We publish consistently	3	
Our podcasts provide actionable content	3	
Our podcasts are listened to	3	
Our podcasts are shared	3	

YouTube

As a buyer can I watch ungated video content to learn about the company, the product and how other companies are using it?

Attribute	1-5	Notes
We have a company Youtube channel	3	
We publish consistently	3	
Our videos provide actionable content	3	
Our videos are watched	3	
Our videos are shared	3	

Executive presence

As a buyer can I get the personal perspective of the senior leadership at the company?

Attribute	1-5	Notes
Our CEO posts consistently on LinkedIn	3	
Our CEO posts consistently on Twitter	3	
Our CEO is visible in our content	3	

Social

Company-owned LinkedIn

As a buyer can I receive consistent valuable insight from the company on LinkedIn?

Attribute	1-5	Notes
We have a company page	3	
We have a 'personal' company account	3	
We publish consistently	3	
Our posts provide actionable content	3	
Many of our posts are written by non-marketing	3	
Our posts are commented on by others	3	
Our posts are shared	3	

Company-owned Twitter

As a buyer can I receive consistent valuable insight from the company on Twitter?

Attribute	1-5	Notes
We have a company account	3	
We have a 'personal' company account	3	
We publish consistently	3	
Our posts provide actionable content	3	
Many of our posts are written by non-marketing	3	
Our posts are commented on by others	3	
Our posts are shared	3	

Non-owned LinkedIn

As a buyer, can I find out what customers, partners or analysts say about the company on LinkedIn?

Attribute	1-5	Notes
Our company is mentioned by others	3	
Our people are mentioned by others	3	

Non-owned Twitter

As a buyer, can I find out what customers, partners or analysts say about the company on Twitter?

Attribute	1-5	Notes
Our company is mentioned by others	3	
Our people are mentioned by others	3	

Product Review Platforms

G2

As a buyer, can I find out what customers, partners or analysts say about the company on G2?

Attribute	1-5	Notes
We appear in our target segments	3	
Our page is optimised with video and screenshots	3	

TrustRadius

As a buyer, can I find out what customers, partners or analysts say about the company on TrustRadius?

Attribute	1-5	Notes
We appear in our target segments	3	
Our page is optimised with video and screenshots	3	

Gartner Peer Index

As a buyer, can I find out what customers, partners or analysts say about the company on Gartner Peer Index?

Attribute	1-5	Notes
We appear in our target segments	3	

Communities

Discord

As a buyer, can I find out what customers, partners or analysts say about the company in Discord communities?

Attribute	1-5	Notes
We are active in third party Discord channels for our segment	3	
We maintain our own Discord channels for customers and potential customers	3	

Slack

As a buyer, can I find out what customers, partners or analysts say about the company in Slack communities?

Attribute	1-5	Notes
We are active in third party Slack channels for our segment	3	
We maintain our own Slack channels for customers and potential customers	3	

Whatsapp

As a buyer, can I find out what customers, partners or analysts say about the company in Whatsapp groups?

Attribute	1-5	Notes
We are active in third party Whatsapp groups for our segment	3	
We maintain our own Whatsapp groups for customers and potential customers	3	

Reddit

As a buyer, can I find out what customers, partners or analysts say about the company in Reddit communities?

Attribute	1-5	Notes
We are active in third party Reddit channels for our segment	3	
We maintain our own Reddit channels for customers and potential customers	3	

Third Party Events

In person events

As a buyer can I learn about the company at in person third party industry events?

Attribute	1-5	Notes
We are sponsoring upcoming third party events	3	
We have customer speakers at third party events	3	

Online events

As a buyer can I learn about the company at online third party industry events?

Attribute	1-5	Notes
We are sponsoring upcoming third party events	3	
We have customer speakers at third party events	3	

Pre-recorded events

As a buyer can I learn about the company by accessing pre-recorded third party industry events?

Attribute	1-5	Notes
Customers can access pre-recorded third party events	3	

Third Party Content

Articles

As a buyer can I read about the company in third party articles?

Attribute	1-5	Notes
Customers can find third party content that includes employee input	3	
Customers can find third party content without employee input	3	

Analyst Reports

As a buyer can I learn about the company in analyst industry reports and rankings?

Attribute	1-5	Notes
Customers can find vendor assessment reports including us	3	
We rank highly in analyst reports	3	
We are mentioned in industry trend reports	3	

Industry Publications

As a buyer can I read about the company in industry websites and newsletters?

Attribute	1-5	Notes
We feature in industry websites in the last 90 days	3	
We feature in industry newsletters in the last 90 days	3	

Third party blogs

As a buyer can I learn about the company in third party blogs and websites?

Attribute	1-5	Notes
We feature in third party blog with employee comment	3	
We feature in third party blog without employee comment	3	

Third party podcasts

As a buyer can I learn about the company in third party podcasts?

Attribute	1-5	Notes
Third party podcasts with employee speaker	3	
Third party podcasts without employee speaker	3	

Third party video

As a buyer can I learn about the company in third party YouTube channels?

Attribute	1-5	Notes
Third party video with employee speaker	3	
Third party video without employee speaker	3	

Partners

As a buyer can I learn about the company on the company's partner's websites?

Attribute	1-5	Notes
Our affiliate partners have published content about us	3	
Our reseller partners have published content about us	3	
Our System Integrator partners have published content about us	3	
Our Technology partners have published content about us	3	

Paid Advertising

As a buyer when I search for the industry segment or company am I shown paid advertising?

Attribute	1-5	Notes
We appear as a promoted result on Google	3	
We appear as a promoted result on LinkedIn	3	
We appear as a promoted result on Twitter	3	
Customers are retargeted having visited our website	3	

Note: Ads will appear depending on your location and personal attributes which may differ from your ideal customer profile.

Word of Mouth

Referral Programme

As a customer, am I shown a referral programme that is easy for me to access?

Attribute	1-5	Notes
We have a visible referral programme	3	

Testimonials

As a buyer can I see consistent and recent social proof from other companies similar to mine?

Attribute	1-5	Notes
We have consistent short form testimonials published	3	
We have video testimonials published	3	
We provide actionable testimonials	3	

SMS

As a buyer do my connections provide me with advice and information about the company on SMS?

Attribute	1-5	Notes
Customers discuss us on SMS/Messaging	3	

Email

As a buyer do my connections provide me with advice and information about the company on email?

Attribute	1-5	Notes
Customers discuss us on Email	3	

PR Activity

As a buyer am I shown regular campaign activity related to the company, the products or the industry segment?

Attribute	1-5	Notes
We have visible brand activity in the last 90 days	3	

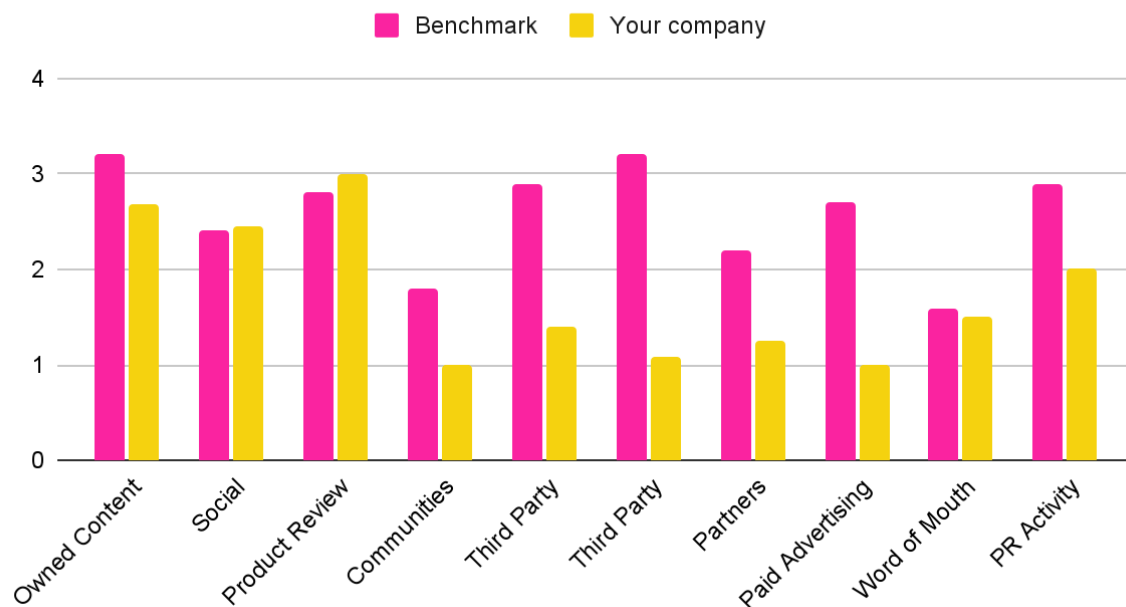
Competitors

As a buyer, when I am researching the industry segment how does this company's content compare to our competitors?

Attribute	1-5	Notes
	3	
	3	
	3	
	3	

Summary

Benchmark and Your company



As a buyer researching this segment [describe whether your company was easily apparent in your research]

Having found [your company], I [describe what you were able to learn about the problem your company solves and the steps a buyer might take to further educate themselves on solving the problem].

Recommendations

I see three priority actions

- ☐ **Action 1.** Describe the action.
- ☐ **Action 2.** Describe the action.
- ☐ **Action 3.** Describe the action

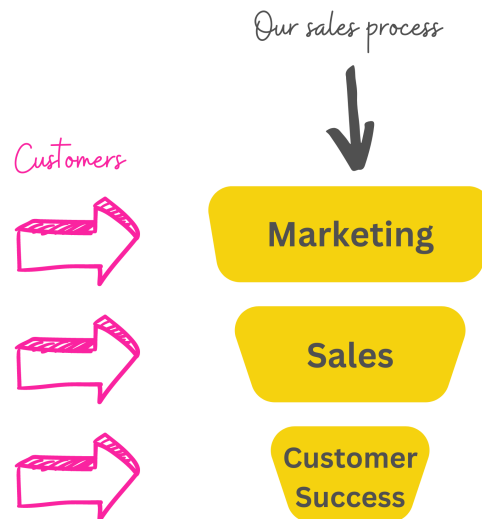
RevOpsCharlie's Revenue Acceleration Flywheel

The way customers buy has changed.

No longer can you force them through the stages of your sales funnel, handing them off from team to team.

Buyers expect to be able to self-serve to find the information they want.

55% of millennial buyers would prefer to buy even complex enterprise solutions with no involvement from a salesperson (*Gartner*).

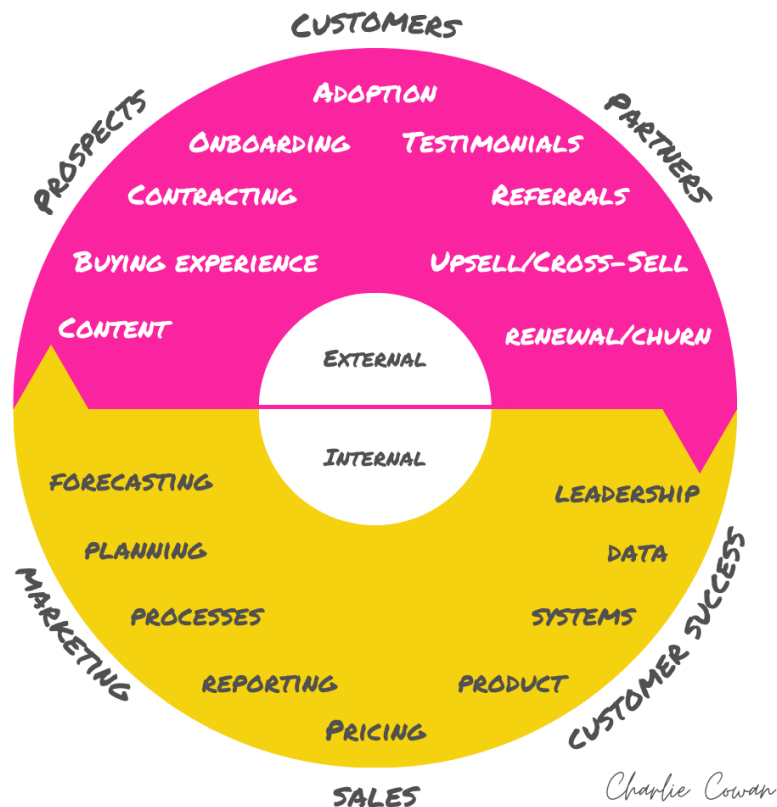


Companies need to rewire their businesses to remove the silos and deploy cross functional systems and processes that give customers what they need when they need it.



The Revenue Acceleration Flywheel visualises the programme you need to work on, continually iterating and improving on each aspect of your revenue system.

The Revenue Acceleration Flywheel for SaaS businesses



You can do this yourself, but in most cases, the first time you reach someone in the business who has responsibility for all of these areas is when you get to the CEO.

I partner with CROs to help them implement the Revenue Acceleration Flywheel, and drive sustainable and scalable revenue growth by aligning sales, marketing and customer success.



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