

# Account Audit Worksheet

Business Name: \_\_\_\_\_

**This will be a focusing exercise for your 2022 plan.** Fixing red areas is top priority. Yellow are areas that require testing. Green areas are things you can strategically exploit for more growth. Keep in mind yellow is AVERAGE.

## 1. Check Overall Performance

Review performance for your ad account as a whole

## 2. Check Drilled-Down Performance

Review performance broken down into two key ad categories (awareness & retargeting)

## 3. Compare Overall Key Spend & Revenue Metrics to Internal Goals

See how well financial metrics for last year matched your goals & expectations

## 4. Compare Drilled-Down Key Spend & Revenue Metrics to Internal Goals

See how well financial metrics for last year matched your goals & expectations by ad category

## 5. Review Best-Performing Ads

Review ad performance by results & engagement, identify the top 5 in each category, and catalog the ad similarities.

## 6. Review High-Opportunity Audience Checklist

Determine if you are targeting all the high-opportunity audiences, or if any are missing.

## 7. Choose your goal for 2020: Launch, ROI, Scale

Choose what your driving focus will be for your advertising in 2022

### OVERVIEW NUMBER REVIEW

Check your color

<b>CPC</b>	>\$2	\$1-\$2	<\$1
<b>CTR</b>	<1%	1%-2%	>2%
<b>FREQUENCY</b>	>7	4-7	<4

### DRILL DOWN NUMBER REVIEW

Check your color

#### Awareness

<b>CPC</b>	>\$2	\$1-\$2	<\$1
<b>CTR</b>	<.75%	.75%-1.5%	>1.5%
<b>FREQUENCY</b>	>7	4-7	<4

#### Retargeting

<b>CPC</b>	>\$3	\$2-\$3	<\$2
<b>CTR</b>	<1.5%	1.5%-3%	>3%
<b>FREQUENCY</b>	>10	6-10	<6

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STEP 3	SPEND & REVENUE OVERVIEW	
	Goal	Actual
	Spend	Spend
	AOV	AOV
	ROAS	ROAS
	CPA	CPA

STEP 4	SPEND & REVENUE DRILL DOWN	
	Goal	Actual
	Spend	Spend
	AOV	AOV
	ROAS	ROAS
	CPA	CPA

STEP 5	TOP ADS REVIEW	
	Performance By Results	Performance By Engagement
	1.	1.
	2.	2.
	3.	3.
	4.	4.
	5.	5.
	Creative Notes:	Objectives Notes:
	Targeting & Audiences Notes:	Copy Notes:

# Account Audit Worksheet

## TOP AUDIENCES REVIEW

Check Yes if using, check No if not

STEP 6

<b>SITE VISITORS</b>	Yes	No	<b>PAGE LIKERS/FANS</b>	Yes	No
<b>EMAIL LIST</b>	Yes	No	<b>INSTAGRAM &amp; FB PAGE ENGAGERS</b>	Yes	No
<b>BUYERS</b>	Yes	No	<b>INTEREST TARGETING</b>	Yes	No
<b>VIDEO VIEWERS</b>	Yes	No	<b>LOOKALIKE AUDIENCES</b>	Yes	No

## 2021 MAJOR GOAL

STEP 7

LAUNCH

ROI

SCALE

## OPTIMIZATION BY: FAILING METRICS

### Potential Optimizations

- Review targeting, ad copy and creative for mismatch
- Prioritize ads that generate social proof
- Shorten length of time a person is retargeted
- Diversify ad creative
- Launch 5 new ads and rotate creative more

### Action Items

- 1.
- 2.
- 3.
- 4.
- 5.

## OPTIMIZATION BY: SPEND/REVENUE

### Potential Optimizations

- Tweak offer structure
- Add additional monetization to your funnel
- Scale vertically - increase spend
- Scale horizontally - take high-performing creatives to new audiences

### Action Items

- 1.
- 2.
- 3.
- 4.
- 5.

# Account Audit Worksheet

## OPTIMIZATION BY: TOP AUDIENCES

### Audience

### Offer

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

## OPTIMIZATION BY: 2022 GOAL

### Potential Optimizations

- Start seasoning ads by boosting posts
- Launch a messenger bot campaign
- Create a offer for a new market segment
- Review Facebook comments and Amazon reviews for copy ideas

### Action Items

- 1.
- 2.
- 3.
- 4.
- 5.

## PLAN

**Major Pitfall #1:** *Do NOT try to do all of these at once.* Your results won't be significant and you won't be able to discern what worked. Instead, build a calendar of things you'll be testing. Testing 2 optimizations a month is aggressive but doable with high budgets - 1 monthly test may suit your business better.

**Major Pitfall #2:** *Be ready to be agile.* Sometimes you have an idea, and it doesn't work. Your next idea used pieces from it - don't use those pieces that didn't work. Adapt!

# 2022 Media Plan

## JANUARY

Optimization 1  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

Optimization 2  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

## FEBRUARY

Optimization 1  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

Optimization 2  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

## MARCH

Optimization 1  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

Optimization 2  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

## APRIL

Optimization 1  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

Optimization 2  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

# 2022 Media Plan

## MAY

Optimization 1  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

Optimization 2  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

## JUNE

Optimization 1  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

Optimization 2  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

## JULY

Optimization 1  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

Optimization 2  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

## AUGUST

Optimization 1  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

Optimization 2  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

# 2022 Media Plan

## SEPTEMBER

Optimization 1  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

Optimization 2  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

## OCTOBER

Optimization 1  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

Optimization 2  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

## NOVEMBER

Optimization 1  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

Optimization 2  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

## DECEMBER

Optimization 1  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

Optimization 2  
Offer  
Awareness Retargeting  
Budget  
Success Metric  
Creative Ideation

