

FREE CRO CHECKLIST

CRO Audit Checklist

12 things to check before you redesign your B2B website.

Most redesign requests are diagnosis requests wearing nicer clothes. Use this checklist to find out whether the site needs targeted fixes, better measurement, or a real rebuild.

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How to use this checklist

Work through the checks in order. The first four tell you whether the data can be trusted. The next four identify conversion leaks. The final four tell you whether the problem is CRO work or redesign work.

Use a simple score: Pass, Needs work, or Fail. If a measurement check fails, stop there. You do not have an audit yet. You have a tracking problem.

1 Is the primary conversion goal defined?

Name the one action the site is supposed to produce: demo request, contact form, trial start, or qualified pipeline from a specific offer. Secondary goals can exist. They cannot all be first.

Check: The primary conversion action is named, visible, and consistent across high-intent pages.

Red flag: The site has five competing CTAs and no one can say which one matters most.

Score: Pass / Needs work / Fail

2 Is form tracking verified end to end?

Submit a test lead. Confirm the event in analytics. Confirm the lead in the CRM. Confirm campaign or source data survives the handoff.

Check: Every key form has a verified conversion event and a traceable path into the CRM.

Red flag: Marketing reports form fills while sales reports not enough leads, and no one can reconcile the two.

Score: Pass / Needs work / Fail

3 Are traffic sources segmented?

Total traffic hides the problem. Segment organic, paid, direct, referral, and campaign traffic before drawing conclusions about conversion performance.

Check: Conversion performance is broken out by traffic source, not only reported in aggregate.

Red flag: The team is arguing about site conversion rate without segmenting by channel.

Score: Pass / Needs work / Fail

4 Can you calculate the value of a form complete?

Use ACV, lead-to-opportunity rate, and close rate to estimate what one additional qualified form completion is worth.

Check: You can estimate the revenue value of one incremental qualified form complete.

Red flag: The website dashboard stops at sessions and conversion rate.

Score: Pass / Needs work / Fail

Find the biggest conversion leak

5 Which page owns the largest drop-off?

Map the real path from entry to conversion. Find the page or step where qualified visitors are leaving at the highest rate.

Check: You know the page or step where the largest qualified drop-off happens.

Red flag: The audit starts with homepage copy because it is the easiest page to discuss.

Score: Pass / Needs work / Fail

6 Does the first screen answer the buyer's first questions?

The hero should identify the problem, name or imply the buyer, state the outcome, and offer a visible next step.

Check: The first screen answers who this is for, what problem it solves, and what to do next.

Red flag: The headline announces the category and the subhead translates it into more category language.

Score: Pass / Needs work / Fail

7 Is proof placed where doubt appears?

Logos, numbers, customer quotes, and case studies do their best work near moments of hesitation: after a claim, near a CTA, and beside a form.

Check: The strongest proof appears close to the strongest claims and highest-friction asks.

Red flag: The page asks for a demo before showing evidence that anyone like the buyer got a result.

Score: Pass / Needs work / Fail

8 Is the form asking only for fields you actually use?

Every field needs a real downstream job. If no one uses the answer to route, qualify, personalize, or report, remove it.

Check: Each form field has an owner, a purpose, and a downstream use.

Red flag: The form exists because every team got to add one field.

Score: Pass / Needs work / Fail

Decide whether this is CRO or redesign work

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Is the site architecture aligned with how buyers think?

Navigation should reflect buyer questions and buying stages, not your internal product model or org chart.

Check: The navigation and page structure match buyer questions and buying stages.

Red flag: The site makes perfect sense to employees and very little sense to a first-time buyer.

Score: Pass / Needs work / Fail

10

Does the page support the next sales conversation?

The conversion process has to receive the conversion. A form fill should create enough context for sales to follow up well.

Check: Form submissions create enough context for sales to respond intelligently.

Red flag: The form converts, but sales says the leads are unqualified or confused.

Score: Pass / Needs work / Fail

11

Can the current CMS support the fixes?

Marketing needs enough control to edit copy, reorder modules, add proof near forms, create variants, and publish without waiting weeks.

Check: Marketing can make conversion-critical changes at the speed the roadmap requires.

Red flag: Everyone agrees on the fix, but it cannot ship for six weeks.

Score: Pass / Needs work / Fail

12

Is there a ranked roadmap after the audit?

Rank recommendations by impact, confidence, and effort. Split the roadmap into 30-day quick wins and 60-90 day bets.

Check: Every recommendation has priority, owner, expected impact, and measurement criteria.

Red flag: The findings are grouped by page, but not ranked by business value.

Score: Pass / Needs work / Fail

What your score means

Mostly fails in checks 1-4: fix measurement first. Mostly fails in checks 5-8: you probably have a CRO problem. Mostly fails in checks 9-11: a redesign or partial rebuild may be warranted. Fails in check 12: the audit is not finished until the roadmap is ranked.

A quick example

At Tableau, the contact page was not broken because it looked old. It was broken because it had accumulated too many jobs. Support requests, location finding, sales contact, and help content were all competing on the same page.

The fix was subtraction. Removing distractions and testing that direction over three months lifted contact form conversions 61%, worth \$6.9M in annualized pipeline based on Tableau's historical conversion data.

Want the senior version?

The Web Experience Audit is a fixed-scope, \$3,500 audit delivered in five business days with a ranked roadmap and competitor benchmark.

vigilantweb.com/web-experience-audit/