

ACCOUNT OPTIMIZATION

Get feedback on the work you've done so far.

A Qualifio expert conducts a high-level audit of your company's account. This audit will result in a report consisting of the concrete next steps to implement best practices and catch the low-hanging fruit.

What's included

- Audit by Qualifio expert (e.g. opt-ins, master forms, user management, CRM/SSO variables,...)
- Report of key findings & recommendations
- Briefing call to discuss audit results
- Account optimization
- Session of up to 4 hours on-site workshop and Q&A to implement best practices.

Project methodology



1. Account analysis

The Qualifio team will perform an analysis of the customer account & define actions and priorities in order to reach an ideal scenario. This analysis will result in a detailed report that is sent to the customer (e.g. CRM Variables, opt-in list confirmation).

2. Briefing call

When the audit of the customer account is finished, we plan a call to discuss the results of the audit and get the necessary input and feedback, to complete the account optimization. Next to this, the date and content of the Qualifio day at your offices is lined out.

3. Account optimization

Based on the customer briefing, the next steps are defined both on customer side and Qualifio side. Our team performs the necessary changes to your account.

4. Qualifio day at your offices

A Qualifio expert comes to your office for half a day to discuss the changes that have been made to the account and the next steps for the customer to improve account quality and achieve business goals. This can be combined with a short training.