Catalog SOP: Account Audit - Client Name (Template)

01/28/2025 2:02 pm CST

> **Who is this for:** This SOP is for Brand Managers to help with their tasks of auditing their clients' status. The SOP will provide a list of items to take note.

> **Objective:** Review each high-level section of the client's account, document your findings, add links to tasks you've created or delegated, and assign yourself a task with a delayed due date for any new tasks that can't be initiated immediately.

Design Tier:

BM: Document client's design tier and requested optimizations for each field.

- Design Tier Q&A

- Requested Designs:

- Requested Images:

- Requested Copy:

Tasks for Design Tier:

BM: Review your active tasks to ensure you follow Design Tier guidelines. Add notes next to each optimization section detailing if you're on track or off track, based on the design tier.

- Images:

- Designs:

- Copy:

SEO:

BM: Review client's catalog and active SEO tasks. Check the following: Are we currently working on SEO Phase optimizations? Are any ASINS in the catalog ready for a new phase of SEO that hasn't been tasked out yet? Any holdups with SEO? Create new SEO tasks if needed. Document the findings and link new tasks below if required.

Seller Central Audit:

Sales/Milestones:

BM: review recent and overall sales since client signing (MAG Management). Are sales growing or decreasing? What is the cause? Report and document findings below.

Advertising:

BM: Review recent and overall advertising metrics since client signing. Compare metrics vs. client's ACOS goals and Monthly Budget. Are we constantly missing the ACOS goal? Are we over or under budget each week? Document findings, create and link any ad tickets created from this audit down below.

IPI (Inventory Performance Index):

BM: Review and report on Inventory Performance Index. What is their IPI score? Are they facing restocking or storage limitations? Review each Influencing Factor for IPI and document findings + pitches for improvements on poor factors. Document findings below and link to the newly created ASANA task.

- IPI Score:

Listing Quality Dashboard:

BM: Are there listing quality dashboard optimizations to fill out? Document findings + link to task if so.

Restricted ASINS:

BM: Review Detail Page Removed listings on your client's account. Ensure removed listings are in progress with troubleshooting. Confirm with the client if they'd like listings reinstated that are over one year since removed. Document findings and provide asana links to new tasks.

Suppressed ASINS:

BM: Review Search Suppressed listings. Document search suppressed listings and what's needed to get them reinstated. Provide the link to the tasks below.

Vine Opportunities:

BM: Review vine opportunities for your client. Document ASINs eligible for Vine; consider pitching to your client via email or next meeting. Document findings and link new tasks if applicable.

Coupons/Promotions/Deals:

BM: Review coupons/promotions/deals for your client. Do they have any current discounts going for their products? If not, can we consider pitching discounts on slow-selling or out-of-season items? Document findings link new tasks below.

Growth Opportunities:

BM: Review the growth opportunities page for new ideas and strategies to act on for certain ASINS. Document findings below and link newly created tasks.

Account Health:

BM: Review Account Health page. Documents Asins and issues related to Policy Compliance, Shipping Performance Metrics, etc. Document findings below, and create and link new tasks for our teams to act on.

Voice of Customer (NCX):

BM: Review the Voice of Customer page for Poor or Very Poor listings. Create/link below the task for yourself (or AS) to review these ASINS and recent customer feedback. This will give you insight into issues on the listing and how you can act to resolve them. Link new tasks below.

Performance Notifications:

BM: Any recent performance notifications we need to act on? Document findings and create/link tasks if applicable.

Customer Engagement Emails:

BM: Do we have customer engagement emails set up for your client? Easy value-added service we can provide. If not, create draft campaigns with a few different product types, use other ASINS to cross-sell, pitch to the client via email, or showcase in the next meeting for approval. Create/ link the task for yourself if we need to set this up.

Virtual Bundles:

BM: Review client's catalog. Are there any virtual bundle opportunities to pitch and create for your client? Document ideas and create/link the task to pitch ideas to clients.

Brand Health:

BM: Review the Brand Health page. Review Competitive Prices, Prime Eligibility, and In-Stock Rate for any issues with your client's listings. Document findings and create/link new task below.

Top 5 Listing Review:

BM: Review client's top 5 listings PDP in the last 3 months. Have we completely optimized the listing? Are there any opportunities we're missing? Optimized title, bullets, infographics, video added, A+, brand story, alt text in A+, etc. Link ASINS below, document findings, and create/link the task.