

You've visited this page 2 times. Last visit: 4/5/23

alviajewelry.com

https://alviajewelry.com/pages/about

2. About

Rank: 13.1M

AVIA Jewelry seeks to inspire and enable its customers with a versatile collection that can be tailored to occasion, mood, or outfit.

RD	ST	KW	PAGE	LR	RP	RD	ST	KW	+
4	0.02	5	0	0	0	0	0	0	

alviajewelry.com/pages/kickstarter

Rank: 13.1M

QUICK AUDIT COURSE



DENNIS YU

Chief Technology Officer

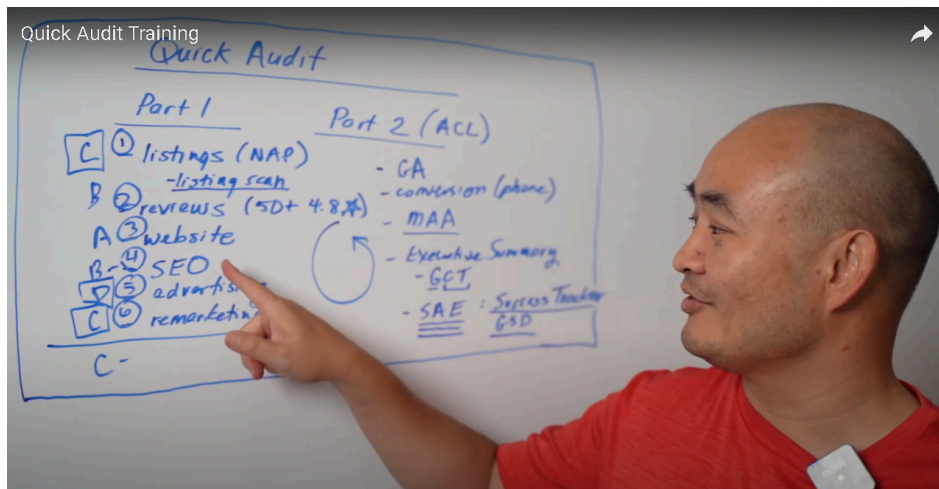
GUIDE VERSION

content_factory_quick_audit_guide_v2.2_2024_0209

Table Of Contents

The Quick Audit.....	3
Parts Of The Quick Audit.....	4
Quick Audit Part 1.....	5
Snapshot Report.....	5
Listings.....	6
Reviews.....	7
Website.....	8
Search Engine Optimization (SEO).....	9
Advertising.....	10
Remarketing.....	11
How To Complete A Quick Audit.....	12
How To Create A Snapshot Report.....	12
How To Save A Snapshot Report.....	16
How To Complete A Quick Audit Part 1.....	19
How To Assign A Quick Audit.....	43
Quick Audit QA Checklist.....	44

The Quick Audit



The Quick Audit is a grading process where an account manager or virtual assistant sets a grade to a businesses' online and digital presence, based on certain components. The virtual assistant primarily conducts the Quick Audit while the account manager assures the quality, accuracy and checks if they have applied the standard practices of the Quick Audit.

The Quick Audit tells the viewer how a business is doing objectively because this score is based not on some arbitrary factor, but based on how the business compares with other businesses in the same vertical. Thus, if a business wants to receive a grade of an "A" the business has to be in the top 90th percentile. For example, the website score is largely based on Google's own page speed insights. Google's tool determines how the website looks from Google's perspective.

If you're an account manager, you should learn how to talk about the Quick Audit and its components. The Quick Audit is a conversation tool as part of client onboarding or the initial client conversation. We use the Quick Audit to be able to talk to our clients about what it is that we do at the Content Factory. We talk about what we find is working or not working, why that is the case, and what we need to do based on our findings.

Ninety percent of what we uncover in a Quick Audit are the same common issues that plague all clients. Your job as a virtual assistant or an account manager is to identify what those issues are and make recommendations on how to fix them, and VAs can do most of the work, so that Account Managers can focus on the relationship, coaching clients on video, etc...

That particular framework is called metrics analysis action, or **#MAA**. We show people metrics, we give them analysis of why that is and put them into context from a business standpoint in the action.

The grades that the virtual assistant or account manager can set may be:

- A+, A: obtaining a score of an "A" means that the business is at the top 90th percentile of all business in that vertical, A-, B+, B, B-, C+, C, C-, D+, D, D-

Parts Of The Quick Audit

1. Quick Audit Part 1 - does not require any access.
2. Quick Audit Part 2 - requires access to platforms and assets such as Facebook, Google, etc.

Quick Audit Part 1

Snapshot Report

The Quick Audit Part 1 is a process and document where you do not require access to a client's business platforms, social media platforms and websites in order to complete.

The team member assembling the Quick Audit Part 1 must log in to Vendasta and run a snapshot report across 6 components.

The six components of the initial Quick Audit are also called a Snapshot Report.

Listings

- The listings refer to **NAP**:
 1. Name.
 2. Address.
 3. Phone number.
- You can find listings across all the different directories.
- The information that the listings show about a business is similar to an identifier such as a phone number or social security number.
- Listing Scan.
 - A process that performs the following functions:
 - i. Tells if the name is spelled differently.
 - ii. Tells if the address is different.
 - iii. Tells if the business does not have a listing in Yahoo, Yelp, Yext, Google, Bing, InfoUSA, Axiom or other providers that combine data together.
 - The listing scan shows how we are doing across different directories.
 - If the listings data is not correct, then we cannot tie everything else together across that particular place of business.
 - We want to make sure that underlying data is together because then we can tie in the most important piece of content which drives rankings which is reviews.

Reviews

- We are looking at Yelp and Google primarily, however there are other sites that also collect reviews.
- We know that when chiropractors have 50 or more reviews at 4.8 stars or higher they tend to do well, which is relative to how they are doing in the market.
- If you do a search for chiropractor and their city name, look at who shows up in the top 3. Usually those folks who have the most reviews at the highest stars and also recently are going to rank higher.
- Without having good reviews that anchor back to that listing, we do not really know if the search engine, particular business, or URL deserves to rank.
- Google My Business (<https://www.google.com/business/>)
 - As part of reviews, we want to know if a business has claimed its Google My Business listing, which a lot of businesses have not.
 - When you run the snapshot report and find there is not a category or a lot of information is incomplete, it may be that the business has not claimed their business.
 - Once we have claimed the business in Google My Business, we can
 - Add more information.
 - Modify existing wrong information.
 - Find reviews the business has not responded to properly.
 - Determine if the business does not have enough reviews.
 - Simply verify if the business does not have a review strategy to create a process where the business constantly collects positive reviews from customers.

Website

- The point of the website is to show up in organic search results.
- Google My Business, reviews and social media sites are all driving traffic to the website.
- Even if a business's listings and reviews are solid, there may be problems that can be on their website which send a message to Google, saying that the website is not worth crawling because it has a variety of different problems.
- Common issues with a website:
 1. Slow load speed.
 2. Insufficient content.
 3. Insufficient relevant information relative to the business.
 4. Spam attacks.
 5. Installed plugins that cause the site to improperly work.
 6. Phone numbers are not easily accessible such as being in an image format instead of text.
 7. Insufficient or no links from other sources such as local newspapers or other businesses.
 8. Not generating traffic from LinkedIn, Twitter, and especially YouTube since YouTube is a Google property.
- We want to know how the website is doing by looking at the mechanics that are broken that cause it to not show up in search results.

Search Engine Optimization (SEO)

- Organic search results are also referred to as Search Engine Optimization (SEO).
- The result of SEO is getting more traffic.
- When we look inside a business's Google Analytics and Google My Business, we want to see signs that our SEO is working properly such as:
 1. Business' website visits.
 2. Number of reviews.
 3. Amount of people that created content.
 4. Number of engagement metrics such as likes and clicks.
- An effective SEO is the result of our content marketing efforts which is why we create one-minute videos and blog posts.

Advertising

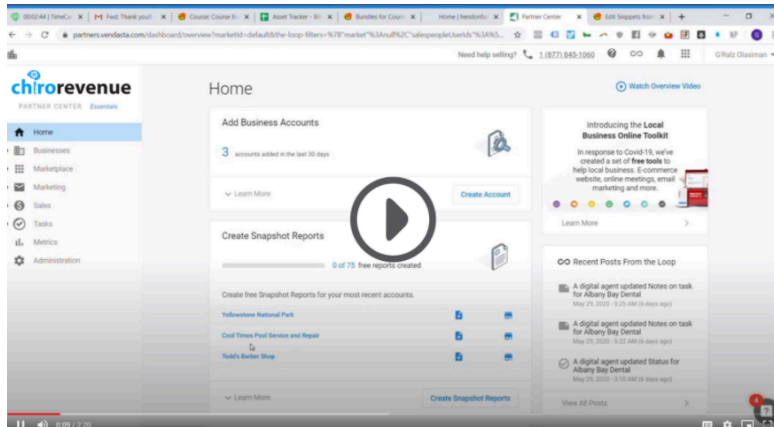
- Advertising is a pay-to-play enterprise.
- The main point of advertising is to run ads on Google and Facebook.
- Competitors can snipe the business keywords at anywhere between \$4 and \$10 per click even though the business may be doing well from an SEO, listings, and review standpoint.
- Even if keywords \$4 and \$10 can be expensive, it may still be worthwhile if we are able to convert that traffic well.
- When we run advertising, we want to:
 1. Buy a business's top keywords in its market.
 2. See what the business's competitors are doing.
 3. Determine how much money the business and its competitors are spending.
 4. See whether the business has a presence.
- For chiropractors, most of the time they do not even have any ads, so we can look at how much traffic they are missing, with potentially hundreds of people that are searching on a particular condition but the business is not showing up because its SEO is not strong enough.

Remarketing

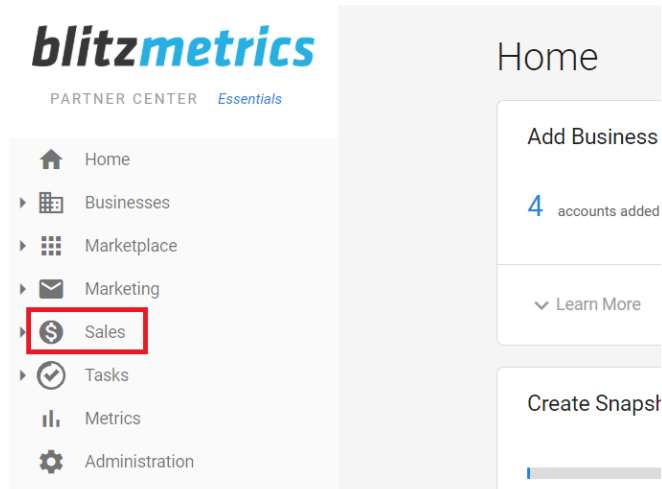
- Remarketing is not available for every kind of business because of restrictions on Google and Facebook.
- For chiropractors we can do remarketing.
- We want to track by putting a pixel in place and send follow-up messages to people who have been to the business's website or have watched a video that we have created on Facebook.
- If someone has watched a video on what you do when you have a splitting headache, then we want to keep showing them more information about that, especially if they have shown interest and watch that video for 15 seconds or more. That's another opportunity to build in more touches to build that relationship that will eventually result in a customer.

How To Complete A Quick Audit

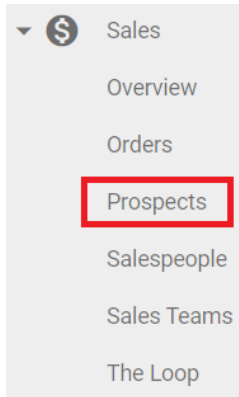
How To Create A Snapshot Report



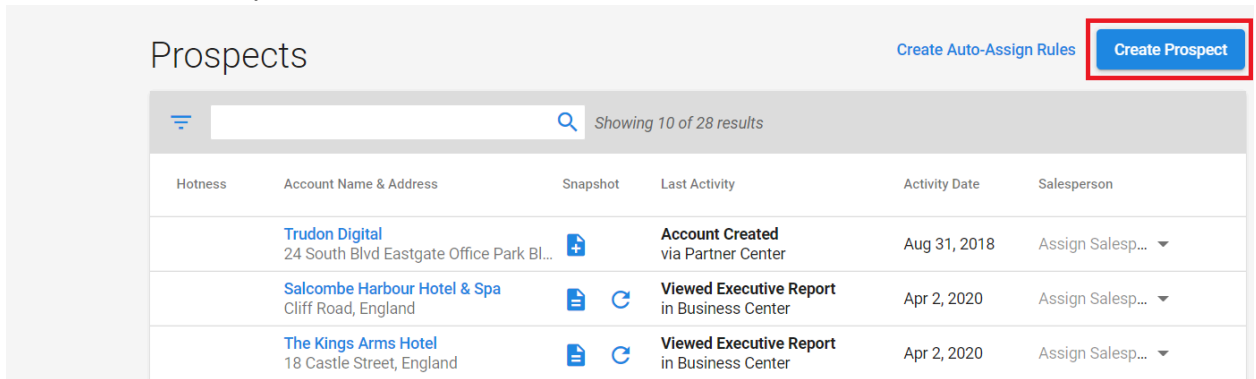
1. Log in to Vendasta Partner Center: <https://partners.vendasta.com/login/>.
2. Click "Sales".



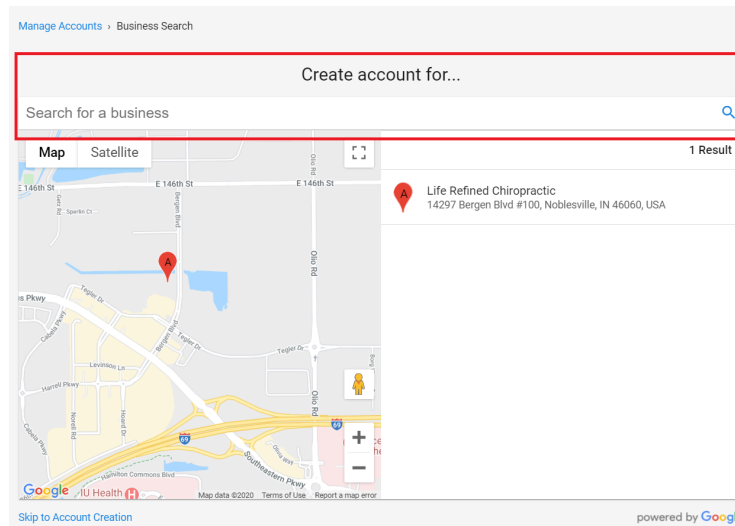
3. Click Prospects.



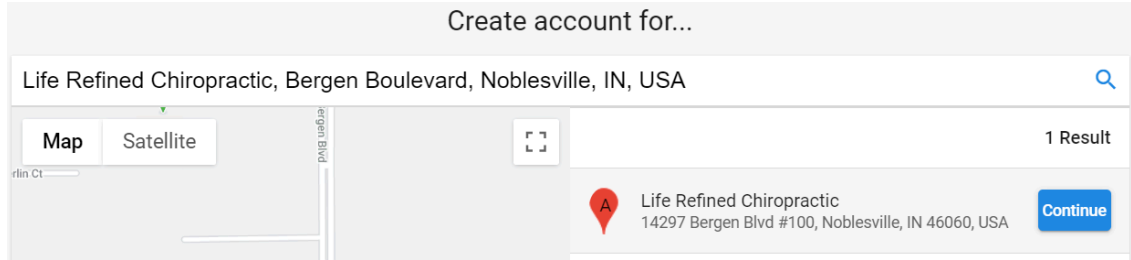
4. Click Create Prospect.



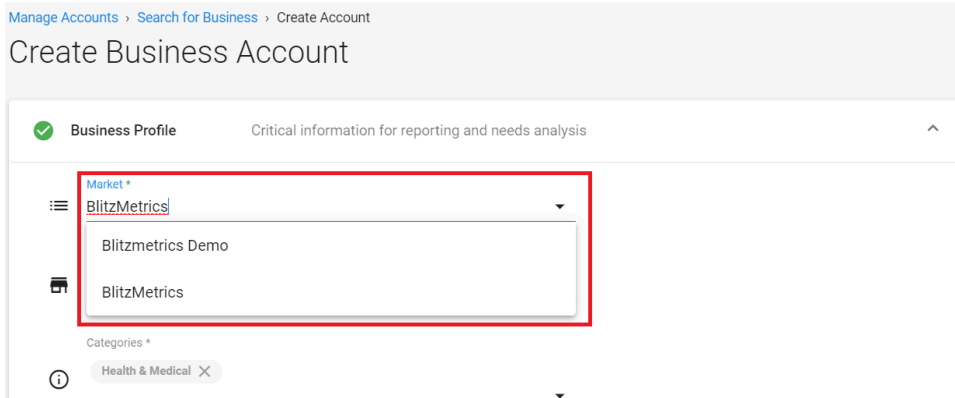
5. Type in Business Name of Client.



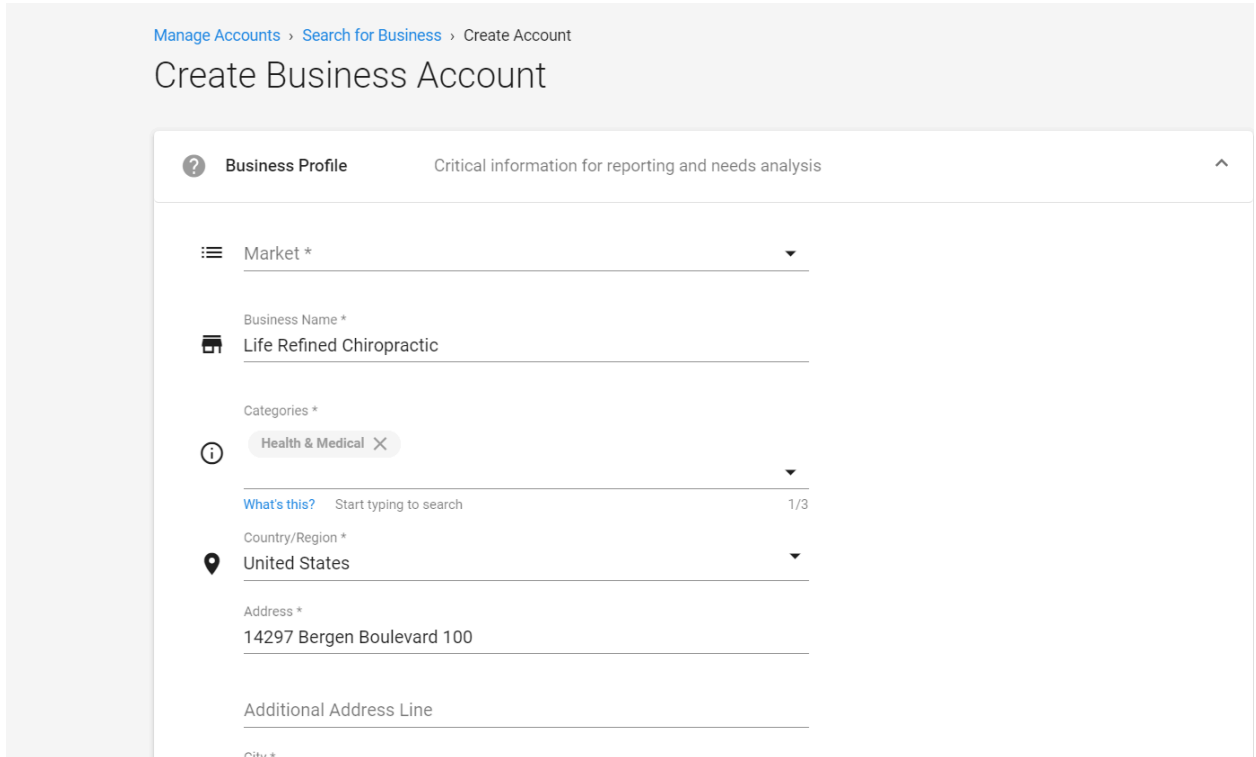
6. Click Continue.



7. Choose Your Market.



8. Fill in Business Details.



9. Click Create Account.

Service Area Business (hide physical address)

Website
 https://www.liferefined.com/

Business Phone Number *
 +1 317-674-8857 [+ Add Phone Number](#)

Toll-free Phone Number

Full Business Profile *Optional* Automatically collected rich listing data that can be edited later ▼

Administration *Optional* Sales and organizational information ▼

Included Products *Optional* Automatically activate these products ▲

Please Select A Market


Create Account

10. Click Create Snapshot Report.

Manage Accounts > Life Refined Chiropractic


Life Refined Chiropractic [Open Business Center](#)

Information for the new account is below.




Create Snapshot Report
Prospect to potential clients

[Create](#)



Activate Product or Services
Already made a sale?

[Activate](#)

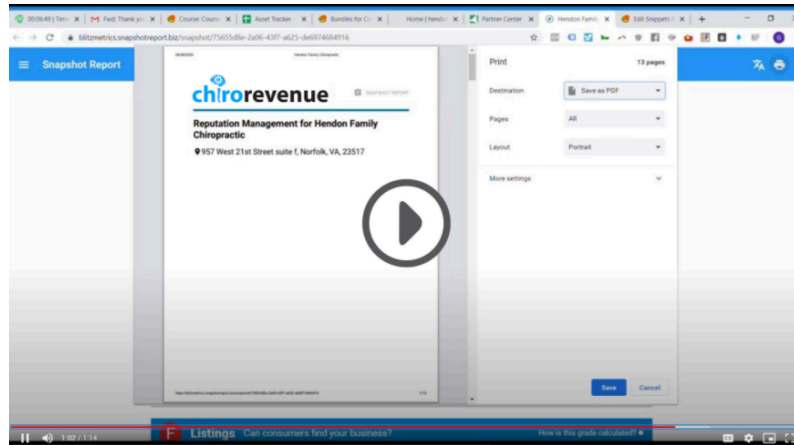


Add Users to Account
Give clients access

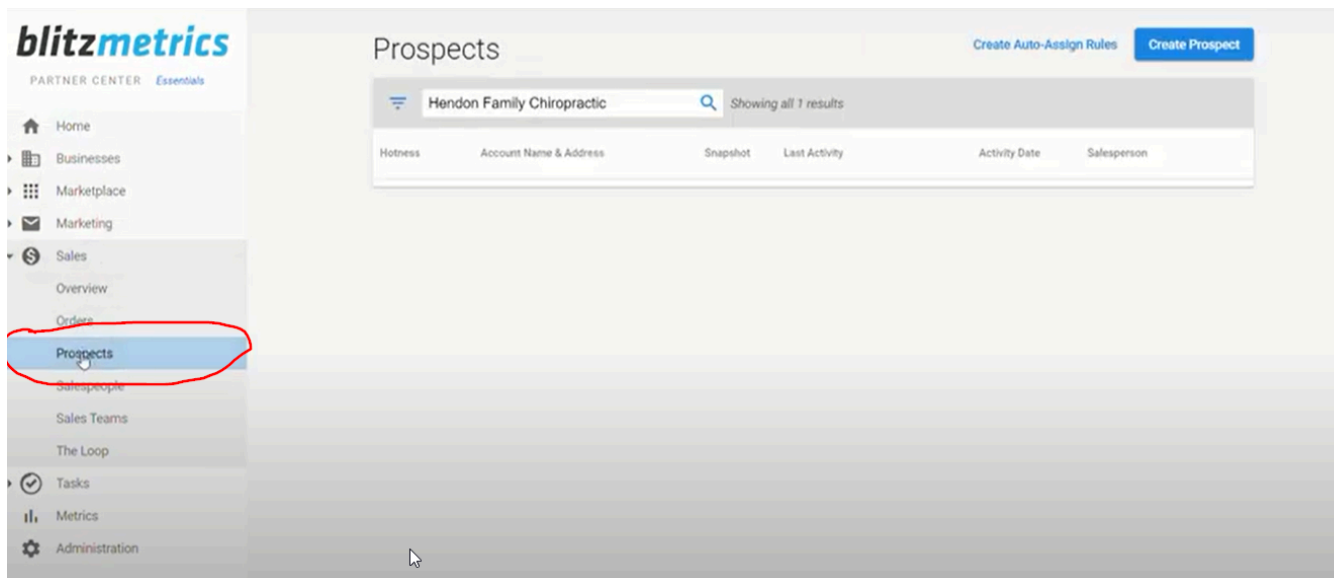
[Add](#)

[Create another account](#)

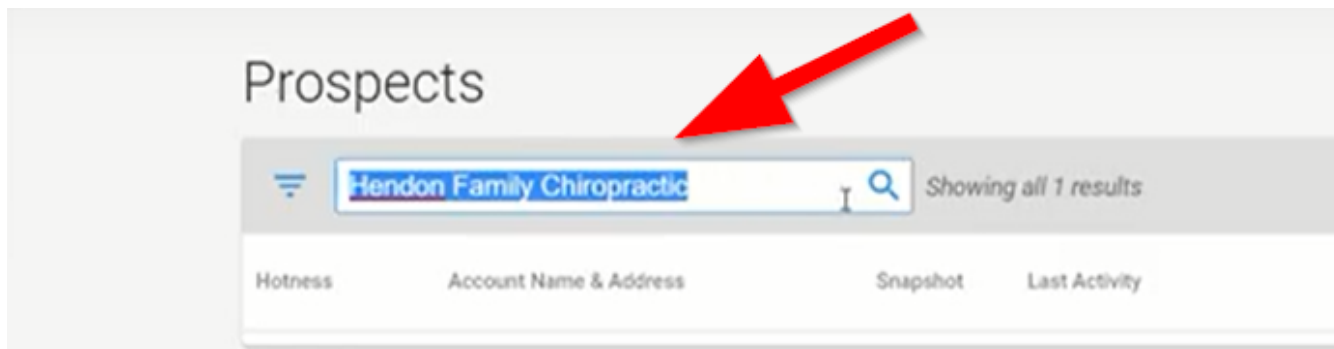
How To Save A Snapshot Report



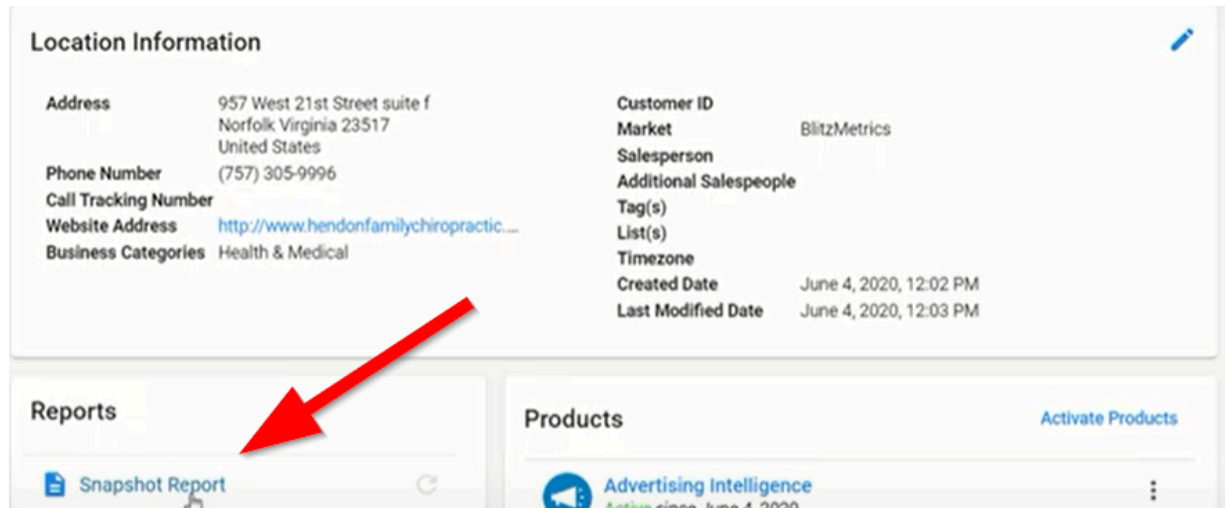
1. To access the Snapshot Report, navigate to **Sales**. Then, click on **Prospects**.



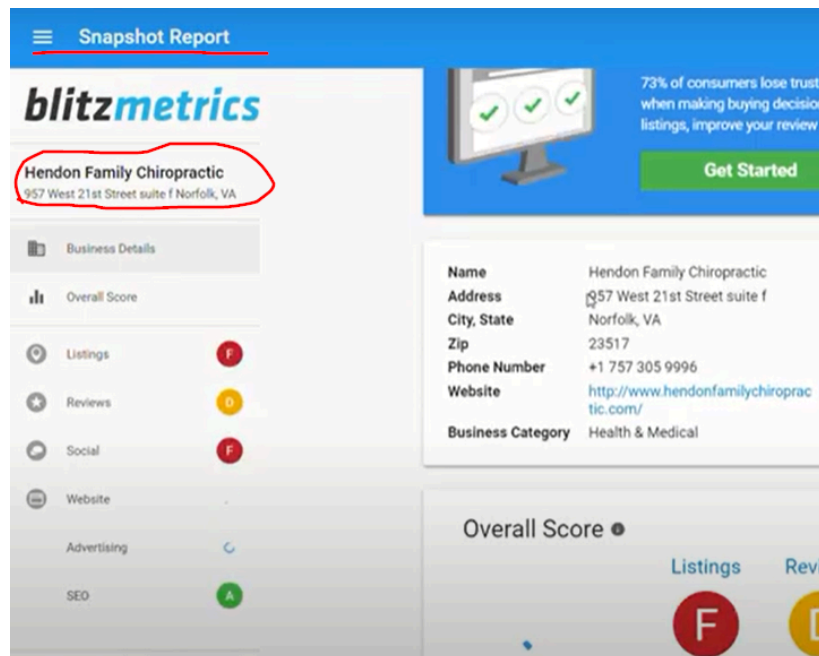
2. On the **search bar**, type the name of the Prospect.



3. Click on **Snapshot Report**.



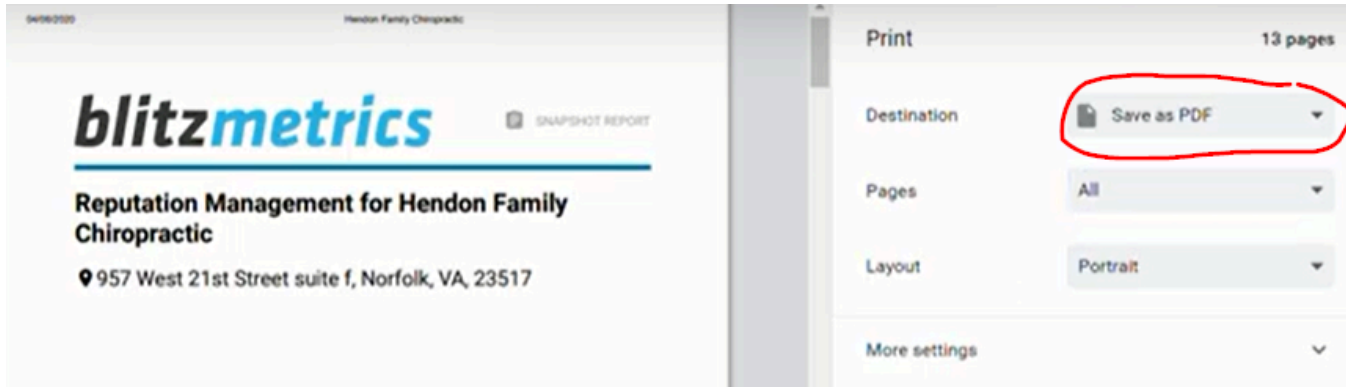
4. It will redirect you to another page showing the whole Snapshot Report.



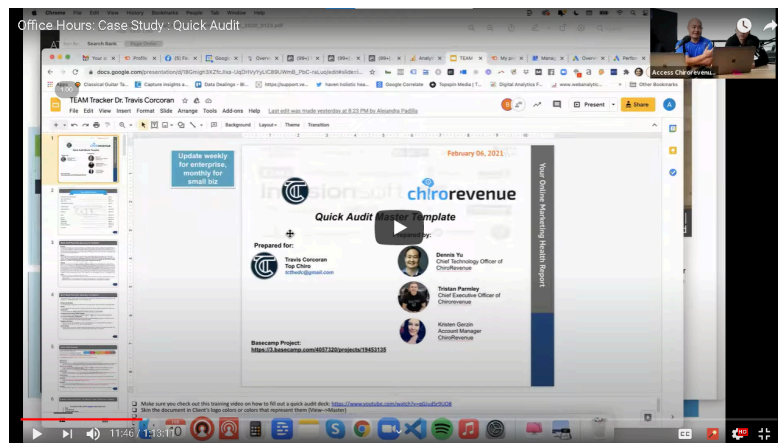
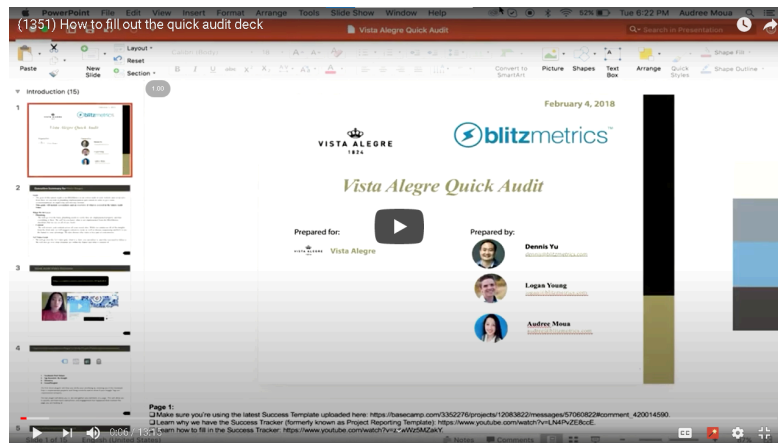
5. Next, click the **Print** button in the upper-right corner of the screen.



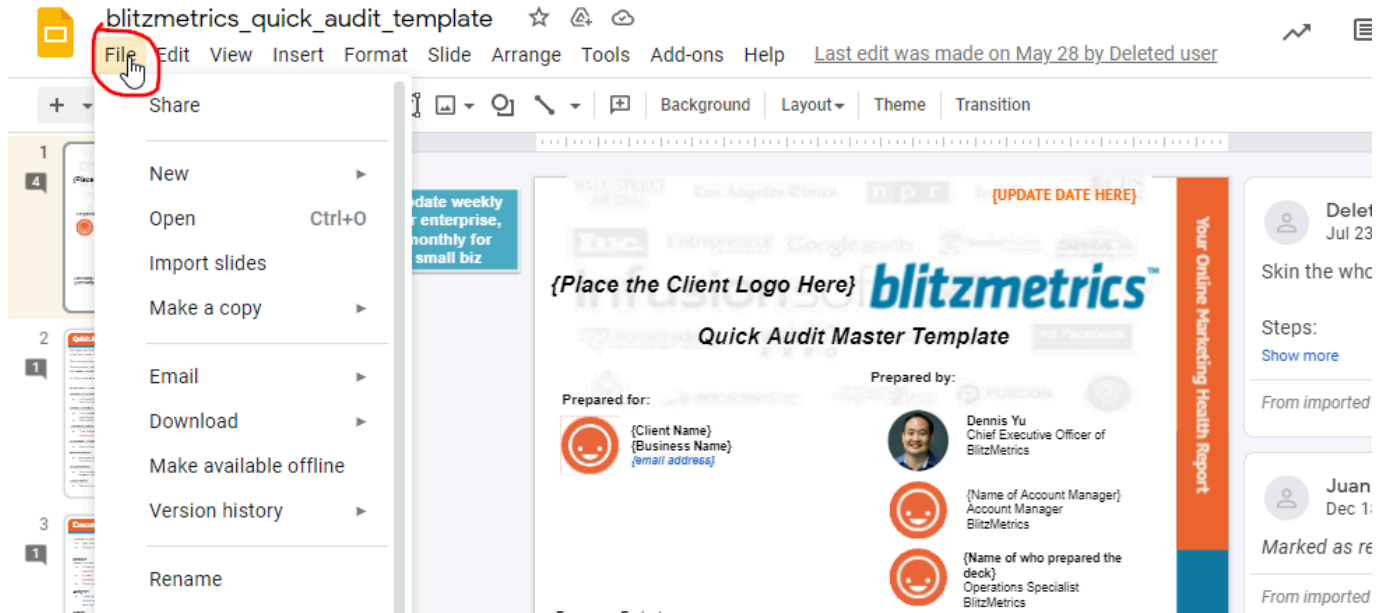
6. Finally, in **Destination**. Save All pages as **PDF files**.



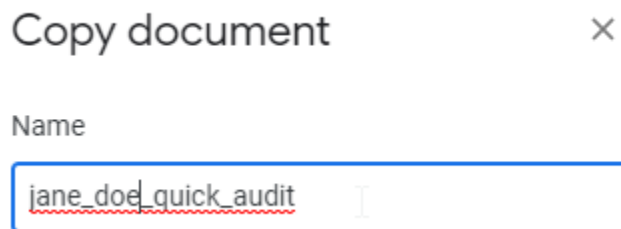
How To Complete A Quick Audit Part 1



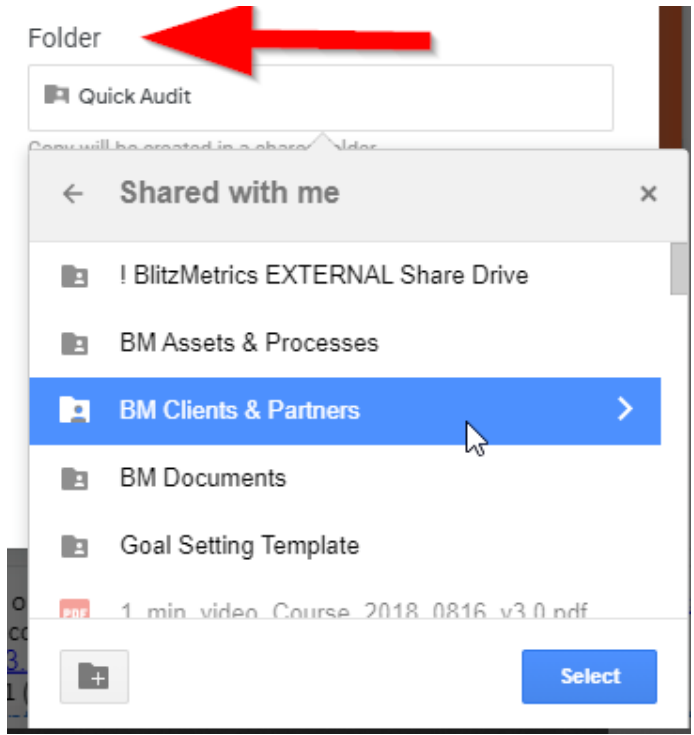
1. Make a copy of the Quick Audit Template.
 - a. Open the Quick Audit Template.
 - i. IF the client is not a chiropractor, open the [blitzmetrics quick audit template](#).
 - ii. IF the client is a chiropractor client, open the [chirorevenue quick audit template](#).
 - b. Click **File**.



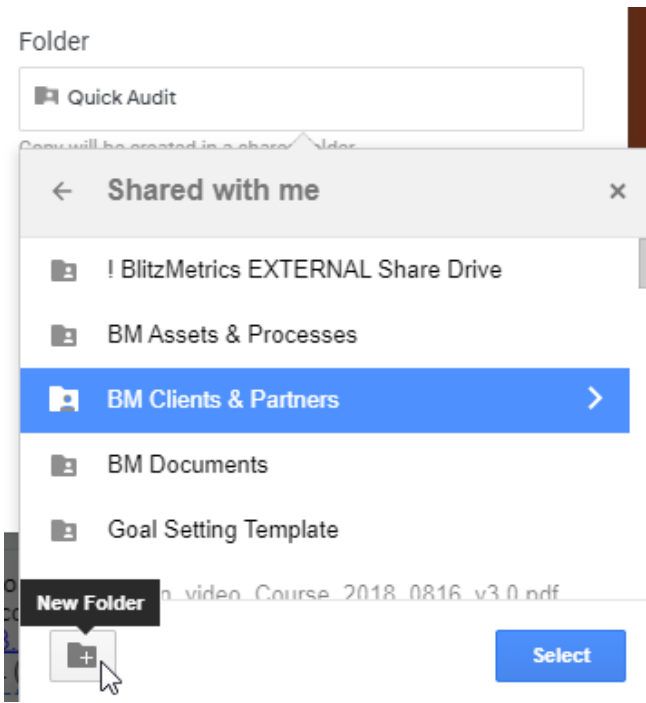
- c. Click **Make a copy**.
- d. Click **Entire presentation**.
- e. Under **Name**, rename the file.
 - i. Delete “Copy of blitzmetrics”, “Copy of chirorevenue” OR “Content Factory”.
 - ii. Delete “_template”.
 - iii. Write the name of the client or the company at the beginning of the filename in lowercase with each word having an underline in-between, e.g. jane_doe_quick_audit.

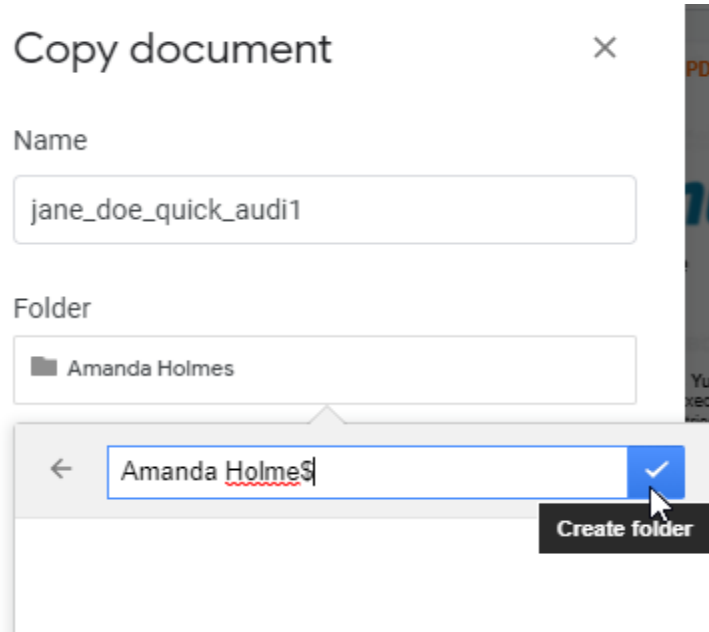


- f. Under **Folder**, select the file for the client or company within the Google Drive folder **BM Clients & Partners**.

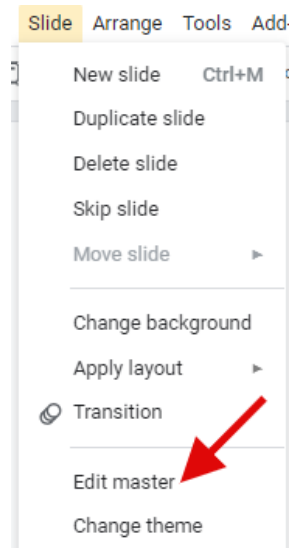


- i. IF the client's folder does not exist, THEN create a folder in [BM Clients & Partners](#) with the name of the client or company, e.g. [Addison Bulosan](#), [Amanda Holmes](#), [Etax](#).

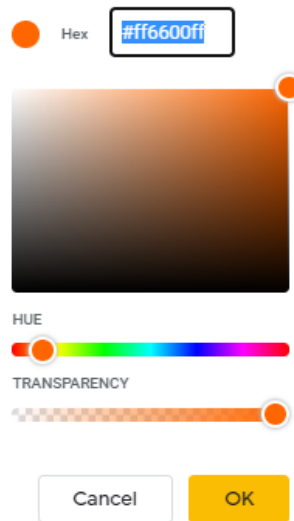




- ii. IF the client's folder exists AND the folder is not in [BM Clients & Partners](#), THEN
 - Move the folder to [BM Clients & Partners](#).
 - Select the client's folder.
 - iii. IF the client's folder is in [BM Clients & Partners](#), THEN Select the client's folder.
- g. Click OK.
2. Skin the slide deck.
- a. In the slide's menu, click on "Slide" and choose "EDIT MASTER". This will open up the Master slide deck and will enable you to skin the document based on the brand colors of the client.



- b. To change the colors and add the client's logo, you need to get the HEX codes of the client's brand colors. One way to do this is by going to the client's website and getting a copy of the client's logo.
- c. Go to "[Canva palette generator](#)" and upload the client's logo. Once you get the HEX codes of the colors, you can then proceed with skinning the slide deck.
- d. Click on the color bars on the side of the slide deck. Go to "Fill Color". Go to custom by clicking on the plus (+) button and change the HEX code based on the client's brand colors. Do this for the rest of the slides.



- e. Add the logo of the client to the first slide and the rest of the slides. Adjust the logo's transparency by clicking on the logo image, format options and adjustments. From there, adjust the logos' transparency to at least 50 to 70% so the color won't overpower any text.
3. Fill in the 1st slide: **Cover Page**.
 - a. Change the date.
 - b. Add the client's logo beside the Content Factory logo.
 - c. Add the picture of the client, the name, client's business name/agency/company, and email address (refer to Strategy Assessment or [infusionsoft](#) to view client's email address).
 - d. Under "Prepared by" make sure you have all the following:
 - i. Dennis Yu.
 - ii. Account Manager.
 - iii. Your Name.
 - e. Add the link to the Basecamp Project.
 4. Fill in the 2nd slide: **Quick Audit Overview**.
The overview should include all dependencies of the Quick audit and these are:

- Latest Social Amplification Engine Guide PDF.
- Plumbing and Site Speed.
- Snapshot Report.
- Goals, Content, and Targeting (GCT).
- Amplification.
- Optimization.
- Conclusion.

5. Fill in the 3rd slide: **Executive Summary**.

- a. Metrics – based on the client's budget and two goals with us (see Strategy Assessment). And key points on the current plumbing set-up and what's needed to track and grow closer to achieving the client's goals.
- b. Analysis.
 - i. **Plumbing** - (Client's Website) Sitewide Https Status, Installed Facebook Pixel and Google Tags.
 - ii. **Content** – (Facebook Company Page) Determine the content posted by the client and which Sales Funnel it belongs to.
 - iii. **Audience** – (access client's Facebook ad account to view which type of audience is the client using – SAVED, CUSTOM, LOOKALIKE)
 - iv. **Campaigns** - (access client's Facebook ad account to view number of Campaigns).
- c. Action Plan - actionable steps set to help clients reach desired goals.

6. Fill in the 4th slide: Business Strategy: **Goals, Content, and Targeting (GCT)** as is.

7. Fill in the 5th to 7th slides: **Goals, Content, and Targeting (GCT).**

In the client's basecamp project, you need to make sure that the "Assessment Strategy" has to be filled out by either the one responsible or accountable (follow RACI).

- a. Go to the Message Board in the client's basecamp project.
- b. Go to the strategy assessment. If this is filled out, you will see:

Strategy Assessment



G'ralz Olasiman
May 13 · No one was notified.

BlitzMetrics GCT for Stephanie Wigner (Circle of Life Chiropractic) as of May 13, 2020

Contact Info: stephanie.wigner112@gmail.com (620) 253-5567



Mission: Empowering families in the Jersey Shore area to gain back their health

Cost Per Lead: \$20.00

Cost Per Sale: \$1,000.00

Target Return on Ad Spend (ROAS): not sure

Monthly Budget:\$500

People on Team: Just me

AdWords status: would like to improve

Facebook status: would like to improve

Google Display Network status: would like to improveLinkedIn status: not yet doingTwitter

status: not yet doingSEO status: would like to improveEmail status: already doing

wellLocal Reviews status: already doing wellApps Status: not yet doingGoal #1 with us: We

have great engagement on social media (FB and IG) but would like our reach to be further

and get a bigger following.Goal #2 with us: Convert leads to patients

c. Copy each of those and paste them to the Quick Audit slide deck.



Mission: Empowering families in the Jersey Shore area to gain back their health

Cost Per Lead: \$20.00

Cost Per Sale: \$1,000.00

Target Return on Ad Spend (ROAS): not sure

Monthly Budget:\$500

People on Team: Just me

AdWords status: would like to improve

Facebook status: would like to improve

Google Display Network status: would like to improveLinkedIn status: not yet doingTwitter

status: not yet doingSEO status: would like to improveEmail status: already doing

wellLocal Reviews status: already doing wellApps Status: not yet doingGoal #1 with us: We

have great engagement on social media (FB and IG) but would like our reach to be further

and get a bigger following.Goal #2 with us: Convert leads to patients



Story: <https://www.circleoflifechironj.com/meet-dr-stephanie-chiropractor-point-pleasant/>

However, we do have two doctors in our practiceNiche: helping pregnant women, postpartum women and childrenUnique Selling Proposition: We offer comprehensive chiropractic care for the entire family. We are the leading pediatric and prenatal wellness chiropractic office at the Jersey Shore. We encourage families to take a complete body approach to improving their overall healthProof: Mainly our google reviews- Im sure this could be improved in other formats.Content producer: Me (Business Owner)Pieces of content per week: 1-2Top Article 1:Top Article 2:Top Article 3:Top Video 1:Top Video 2:Top Video 3:Personal Branding Videos:

<https://www.facebook.com/circleoflifechiro/videos/386929615293861/>



Customer Interests:pregnancy

pediatrics

natural healthCompetitors:message therapy

acupuncturist

yoga studio

Original Message // Hey Dr. Stephanie,

In order to have a better understanding of what already you're doing well and where you need to improve on, we need you to fill out our Strategy Assessment where we can learn more about your goals.

Aside from that, it'll give us a better view of how best we can help you reach your goals!


Link:

[// https://blitzmetrics.infusionsoft.com/app/page/gct //](https://blitzmetrics.infusionsoft.com/app/page/gct)

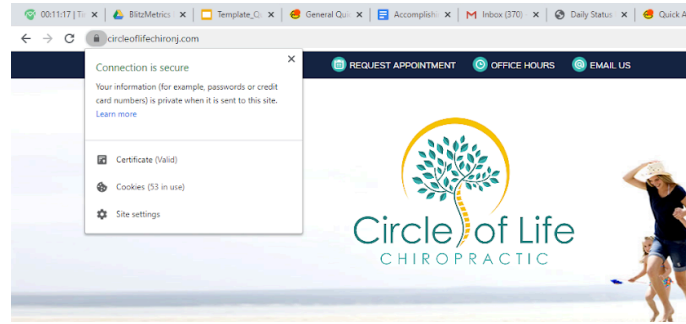
8. Fill in the 8th slide: **Overview of Goals, Content and Targeting**

a. GOALS - Clients two goals with us.

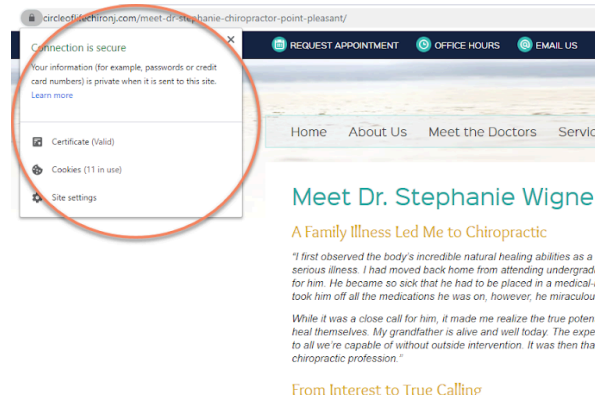
b. CONTENT.

- Main Content Creator.
 - Story (summary client's story).
 - Niche.
 - Top3 Videos and Articles.
- c. TARGETING.
 - Customer's Interest and Competitors.
- d. ACTION PLAN.
 - Recommendations and Link to our packages.
- 9. Fill in the 9th slide: **Snapshot Report Summary: Your Overall Online Performance & Status.**
 - a. Request a Snapshot Partner Access to your team lead via email or Basecamp.
 - b. See training at [How To Create A Snapshot Report](#).
 - c. Add the PDF copy of the Snapshot Report to the Basecamp project of the client.
- 10. Fill in the 10th slide: **OVERVIEW OF SNAPSHOT REPORT**
 - a. Create a summary of each letter grade.
 - i. Listing.
 - ii. Reviews.
 - iii. Social.
 - iv. Website.
 - v. Advertising.
 - vi. SEO.
 - b. Add Recommendations as is.
 - c. Link Snapshot Report PDF on "Click Here".
- 11. Fill in the 11th slide: **Recommend Products** as is for now.
- 12. Fill in the 12th slide: **Access Checklist of Your Accounts.**
 - View Access to do on Basecamp to copy the updated checklist.
- 13. Fill in the 13th slide: **Sitewide HTTPS Status.**
 - a. Go to the client's website.
 - b. On the Top left corner, within the search bar. You will see a secure lock button. 

c. Click on the button and to see “additional information about the site”.



d. Take a screen capture of the information and put a circle around it for emphasis.



e. Paste this screen capture onto the quick audit slide deck.

f. Include a simple analysis on why it is important to have a secure connection and how it helps in plumbing.

- i. IF the client does have sitewide HTTPS, THEN write, “Your website contains sitewide HTTPS which you can tell by the green secure lock button. By having sitewide HTTPS your rank in the search results are higher. This results in a higher security rate when driving conversions and taking in information such as credit cards and passwords.”
- ii. IF the client does not have sitewide https, THEN write, “Your website does not contain sitewide HTTPS, you can tell because it does not have a green secure button. With your website not having sitewide HTTPS, you rank lower in the search results due to the lack of security. Therefore, when taking in important information such as credit cards and passwords, it could lead to it being potentially stolen. We recommend obtaining sitewide HTTPS to increase search ranking and keep important information secure to those buying your services or products.”

14. Fill in the 14th slide: **Facebook Pixel Status.**

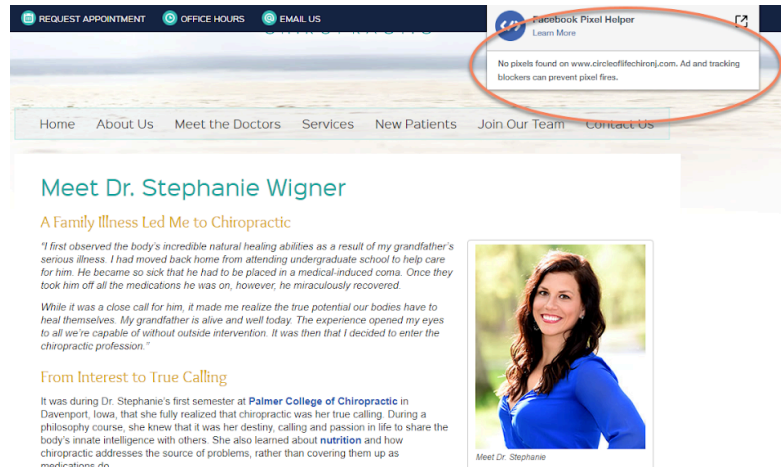
a. Download the [Facebook Pixel helper Chrome Extension](#).

- b. Make sure you are logged in to your Facebook Account.
- c. Go to the client's website.
- d. Click on the Facebook Pixel Helper button located on the upper right hand corner beside the search bar of your browser.



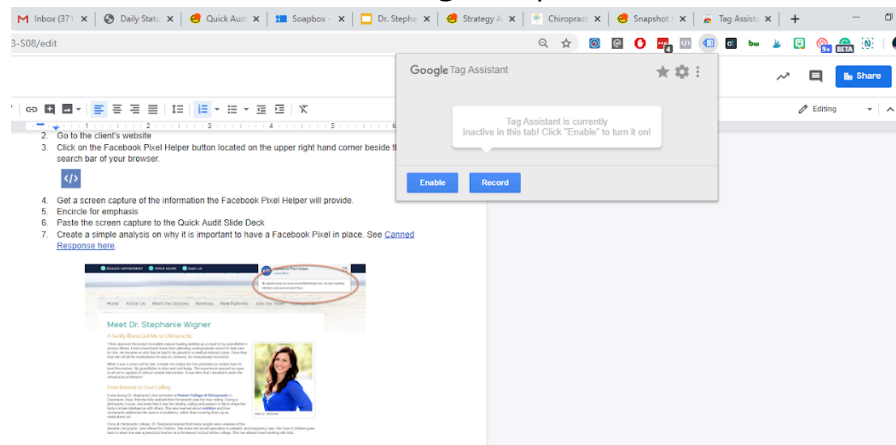
- e. Get a screen capture of the information the Facebook Pixel Helper will provide.
- f. Encircle for emphasis.
- g. Paste the screen capture to the Quick Audit Slide Deck.
- h. Create a simple analysis on why it is important to have a Facebook Pixel in place.
 - i. IF the client does have a Facebook Pixel, THEN write, "We see that you have a Facebook Pixel in place on your website. Utilizing the Facebook Pixel can be an important part of remarketing and tracking all of your data coming in from Facebook. With the pixel in place, you can drive more traffic as well as conversions by grabbing remarketing audiences and providing multiple touches to move your customers down the funnel."
 - ii. IF the client does not have a Facebook Pixel, THEN write, "We see that you do not have a Facebook Pixel in place on your website. This means that you cannot track all of your incoming and outgoing data coming from your Facebook. Without the ability to track the traffic on your landing pages, you cannot remarket the traffic you paid for to drive to your website. This makes the money you spend on digital marketing efforts not go near as far as it could. We recommend installing the proper retargeting software to get the most out of remarketing the traffic your website receives to increase your

conversions."



15. Fill in the 15th slide: **Google Tags Status.**

- a. Download [Google Tag Chrome Extension](#).
- b. Go to the client's website.
- c. Click on the Google Tag Manager Button on the top right corner of your browser.
- d. Click on Enable and Recording to capture the site's data.

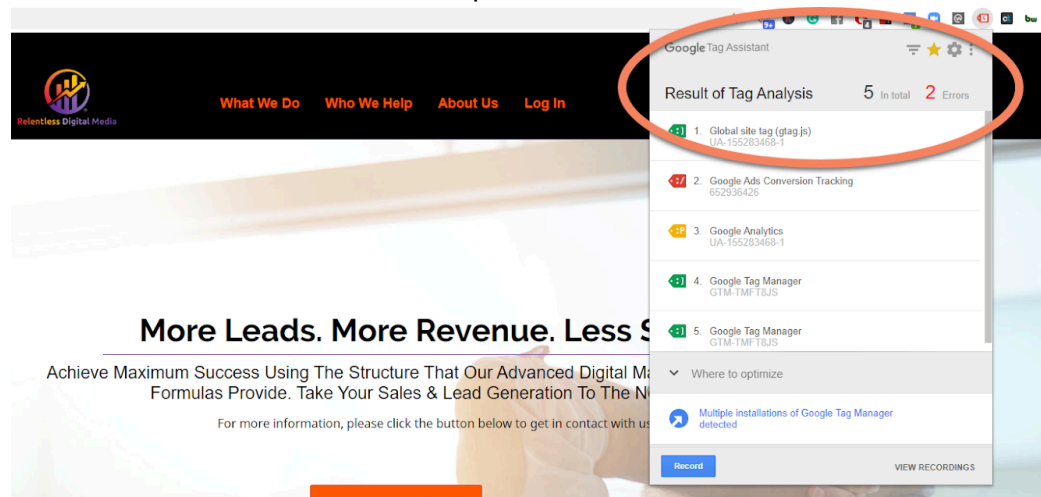


- e. Refresh the website.

You will notice that the Google Tag chrome extension button will either turn Green or Yellow. Click on it and it will show you if the client has GOOGLE TAG MANAGER, GOOGLE ANALYTICS, and/or GOOGLE REMARKETING TAG.

- f. Take a screen capture.

g. Encircle the information for emphasis.



h. Copy and paste the screen captured image to the quick audit slide deck.

i. Add a simple analysis about why it is important for a website to have all three - GOOGLE TAG MANAGER, GOOGLE ANALYTICS, and/or GOOGLE REMARKETING TAG. See [Canned Analysis here](#).

i. **Google Tag Manager:**

- IF the client **does have a Google Tag Manager**, THEN say: *"We see that you have a Google Tag Manager implemented on your website. This acts like a container to hold all of the current tags and pixels you have in place on your website. Utilizing the Google Tag Manager will increase your overall website speed. Therefore, having a faster overall speed can have a lower bounce rate when driving traffic to your website."*
- IF the client **does not have a Google Tag Manager**, THEN say: *"We see that you do not have a Google Tag Manager implemented on your website. By not having the Google Tag Manager implemented, your tags will individually be in place. Because of the loading time of the individual tags your website speed will be slower. With a slower website speed, you will have a higher bounce rate which means the majority of the time customers do not even land on the landing page."*

ii. **Google Analytics:**

- IF the **client does have the Google Analytics tag**, THEN say: *"You have the Google Analytics tag implemented. This will allow you to measure out the results of individual campaigns and compare them to other data sets. Google Analytics can allow you to optimize for those campaigns that are performing best. This*

results in a higher conversion rate due to optimizing your campaigns that are giving you the best results.”

- IF the client **does not have the Google Analytics tag**, THEN say: *“You do not have the Google Analytics tag implemented. By not having the tag implemented, you are not able to gather important metrics that can establish how well your campaigns are performing. By not being able to identify what campaigns are performing, you might have an inflated spending on your ads due to not having the proper metrics to optimize. We recommend utilizing the Google Analytics tag to allow you to optimize the campaigns driving you the most conversions and further amplifying those campaigns.”*

iii. **Google AdWords Remarketing Pixel:**

- IF the client **does have the Google AdWords Remarketing Pixel tag**, THEN say:
“You have the Google AdWords Remarketing Pixel implemented on your website. By having the remarketing pixel in place, it allows you to strategically remarket to users who have already been to your website allowing you to consistently move customers down your funnel. If properly used, this traffic can be remarketed for conversion on multiple channels which can result in higher conversion rates at a lower cost as your prospects have had multiple touches before the sale.”
- IF the client **does not have the Google AdWords Remarketing Pixel tag**, THEN say:
“You do not have the Google AdWords Remarketing Pixel implemented on your website. By not having the remarketing pixel implemented, you are not able to remarket to the users who are showing interest in your brand by visiting your website. This results in you missing out on potential leads that you could provide multiple touches on to later convert. Providing multiple touches will allow you to have a higher conversion rate.”

16. Fill in the 16th slide: **Your Current Website Speed for Desktop and Mobile.**

- a. Use [Website Grader](#) to see client’s website performance. Screenshot the following:
 - i. Grade value.
 - ii. Website home page.
 - iii. Performance.

- iv. Mobile.
- v. Security.
- vi. SEO.

17. Fill in the 17th Slide: Overview: **Your Current Website Speed for Desktop and Mobile.**

- a. Give a short overview on each grade value. Use [think with Google](#) to get the value on the loading time on a 4G connection.
- b. Provide analysis.
 - i. Comparison of your speed and optimization for mobile and desktop.
 - IF the client optimization is good (80 and above/100), THEN say:
"Your optimization for your website is good, which means that your website follows common performance best practices such as optimizing images, prioritizing visible content, removing render-blocking, and enabling compression. Due to these best practices, your website contains efficient website speed resulting in a low bounce rate. The great thing about this is that when customers are clicking on your ads, more of them actually land on your landing page and convert."
 - IF the client website speed is medium/low (80 and below/100), THEN say: *"The optimization for your website is medium/low which means that your website is missing some common performance best practices such as optimizing images, removing render-blocking, and enabling compression. Having slow website speed can result in a high visitor loss rate. This can cause customers to click off your website before even reaching the landing page."*

18. Fill in the 18th slide: **What Should You Do Next To Improve Website Speed?**

- a. Post screenshot of "What Should I Do Next?" on website grader.
- b. Keep description down below for client information: "Check out the recommendations up above to apply to your website to improve website speed and optimization. By improving your website speed and optimization it increases your efficiency which allows more visitors to effectively land on your landing page and not click off due to long loading times."
























































19. Fill in the 21st Slide: **Facebook Analysis.**

- a. Verify that a Virtual Assistant or Specialist has completed the Access Audit.
- b. Go to the client's Facebook Business Page.
- c. Click on " Go to **Business Manager** to manage this Page".
- d. Go to "Insights".

- e. Go to "Posts".
- f. Check "All Posts Published".
- g. Identify the posts which performed best. High engagement and reach.

All Posts Published Create Post

■ Reach: Organic / Paid ■ Post Clicks ■ Reactions, Comments & Shares #

Published	Post	Type	Targeting	Reach	Engagement	Promote
06/09/2020 12:24 AM	 Raise your hand if you're having an awesome Monday			242 	15 28 	Boost Post
06/08/2020 9:03 PM	 TDI will be at our Point Pleasant location on June 10th			32 	7 3 	Boost Post
06/02/2020 3:53 AM	 It has come to our attention that our phone lines aren't working.			169 	2 0 	Boost Post
05/27/2020 11:40 PM	 This momma is a dear friend and fellow birth worker 🤱			4.8K 	1.5K 69 	View Promotion
05/26/2020 9:50 PM	 Circle of Life Chiropractic			0 	0 58 	Boost Post
05/20/2020 8:08 PM	 This is not surprising at all. The human body is incredible 🤯			306 	29 25 	Boost Post
05/19/2020 11:15 PM	 That <i>post-adjustment- legs stretched out- arms over</i>			2.7K 	364 77 	View Promotion
05/12/2020 11:10 PM	 As prenatal chiropractors, we understand that your physical			352 	40 33 	Boost Post
05/10/2020 9:03 PM	 Happy Mother's Day to all of the wonderful women in our			142 	1 14 	Boost Post
05/05/2020 10:14 PM	 Things we love: 🍷 🌻 🍷 . . . Happy Tuesday!			281 	28 42 	Boost Post
05/01/2020 8:27 PM	 We're celebrating ONE whole year of Dr Monika being a part			320 	16 57 	Boost Post

- h. Open the posts with high engagement and reach.
- i. Take a screenshot of those posts.
- j. Copy them to the Quick Audit Slide Deck.
- k. Include Facebook Page metrics.
 - i. The number of followers.
 - ii. The number of likes.
 - iii. The type of content the page has following the Facebook funnel - Top (Awareness), Middle (Consideration), and Bottom (Conversion).
- l. Provide analysis and recommendations.
 - i. Content Distribution in the Facebook funnel (Awareness, Engagement, Conversion).
 - IF the majority of the client content is top funnel (awareness), THEN say: *"We see that the majority of your video content is within the top of the funnel. Though you have great content that*

demonstrates your company's mission, we see that there is not enough content that provides your customer with the educational value of your product/service, or content that will drive you conversions. Spending on your top funnel content will cause a low conversion rate, due to not having the proper call to action. We recommend creating content that communicates the educational value of your company's product/service and also has a clear call to action to drive more conversions to your product."

- *IF the majority of the client content is middle funnel (consideration), THEN say: "We see that the majority of your video content only fulfills the needs for the middle of a sales funnel. While your content does a great job educating your customers, we don't see enough content that communicates your mission or drives conversion. This causes the money you spend on traffic to these videos to not have a clear call to action, which will result in a lower conversion rate and an inflated advertising spend. We recommend creating content that communicates your company's mission and also has a clear call to action to drive conversions to your product. "*
- *IF the majority of the client content is bottom funnel (conversion), THEN say: "We see that the majority of your content is within the bottom of the funnel. Your content shows a clear call to action button to drive conversions to your product, however, there is not enough content that establishes your company's mission, or educational value of your product. This causes the money you spend on ads to have a higher cost to run since the content is salesy and also results in high negative feedback. We recommend creating content that demonstrates your company's mission as well as provides the educational value of your product. By doing so, you can provide multiple touches to your customers and have a higher conversion rate."*

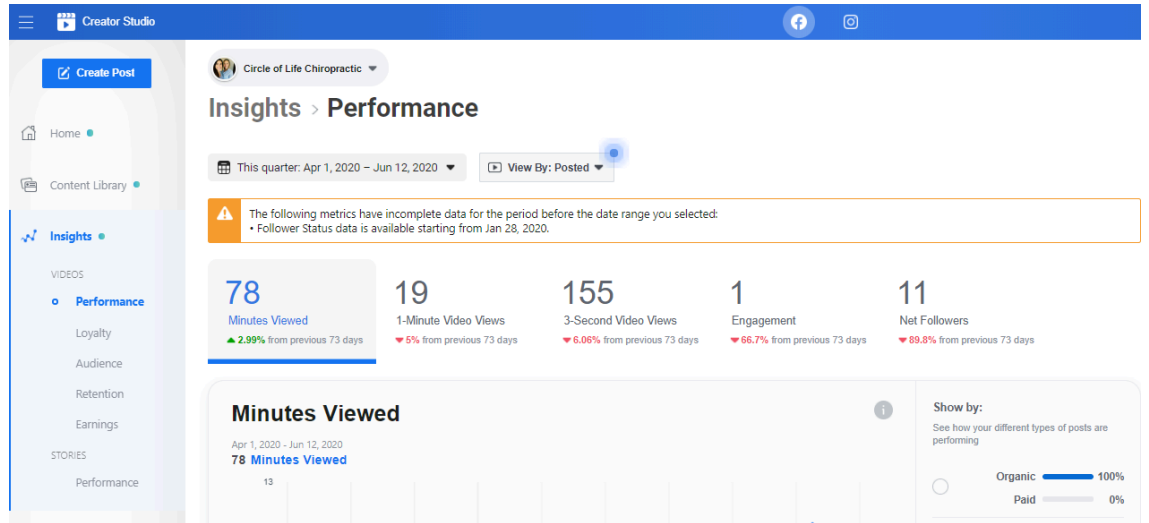
ii. Analysis of the content posted.

- Take 45-50 seconds to provide analysis on the content the client created.

20. Fill in the 22nd slide: **Your Facebook Video Analysis**

- a. Study and follow the [3x3 Video Guide](#) Strategy to be able to provide analysis for this section.
- b. In the client's Facebook Account, access [Creator Studio](#).

- c. Choose the client's Facebook Page.
- d. Click on Insights.
- e. Choose Performance.



- f. Scroll down to the top videos and check the length, the engagement, the reach, and if the video is within 1 minute.

Video	Date Added	Minutes Viewed	1-Minute Video Views	3-Second Video Views	Engagement
Our Circle of Life families Circle of Life Chiropractic	07/26/2019 11:24 PM Circle of Life Chiropractic	68	19	122	1
It's Monday and we're so happy to ... Circle of Life Chiropractic	07/01/2019 10:56 PM Circle of Life Chiropractic	2	0	6	0
Have you been contemplating... Circle of Life Chiropractic	06/15/2016 5:40 AM Circle of Life Chiropractic	2	0	2	0
We are excited to announce the... Circle of Life Chiropractic	07/23/2019 11:06 PM Circle of Life Chiropractic	1	0	9	0
When your next patient is running... Circle of Life Chiropractic	05/17/2019 6:28 AM Circle of Life Chiropractic	1	0	4	0

- g. Take a screenshot of the top videos.
- h. Identify if the client's video content follows the A-C-C (Awareness, Consideration, and Conversion) or the WHY, HOW, and WHAT.
- i. Include a short analysis of the video content of the client.
 - i. Average video length.
 - IF the client videos are between 1:00-1:20 minutes, THEN say: *"Your video content is between 1:00-1:20 minutes which is great. We see that videos between those times perform best on Facebook. Creating 1-minute videos can be important in telling your story, educating your customers, and adding a clear direct call to action to drive conversions. We recommend utilizing 1-minute videos and putting money on your video content in*

which you can grab a custom audience and remarket to drive more conversions."

- IF the client videos are longer than 1:00-1:20 minutes Then say: *"Your video content is longer than 1:00-1:20 minutes. We typically see 1-minute videos perform best on Facebook. Typically, a user is not looking to watch a 5-minute video. Longer videos can cause your important points not to be heard. When moving customers down your funnel, lengthy videos could also lead to a lower conversion rate.*
- ii. Analysis of engagement and video views.
 - IF the client engagement and video views are great (10% of their page likes), THEN say: *"Your content is getting great engagement and video views. This means that your customers are resonating with the content you are creating. A good way to take note of content that is performing well is by having a content library and creating more excellent content. Content and videos with great engagement and views only amplify when you put ad spend on them, which can result in a lower cost to run the ads and a more efficient use of your budget."*
 - IF the client engagement and video views are poor (Less than 10% of their page likes), THEN say: *"Your content engagement is low, this could mean that your customers are not resonating with the content that you have. At times, this could also mean that your content generates a lot of negative feedback. When this happens, as well as low engagement, the cost of running that content as an ad will cost you more for the result you are getting. To find what content resonates with your audiences, take a piece of content and run it to 2-3 different audiences and optimize on which one performs best, as well as changing the copy of the content."*
- iii. Strategies for amplification of video content.
 - Take 45-50 seconds to explain strategies that they can utilize to amplify their video content.
(i.e. For video amplification we can utilize Facebook for a Dollar a Day which we can target multiple audiences and see which one performs best. To further help us see which ones are already performing well, we can use our Standards of

Excellence as a measure of how well a video is already performing before boosting the content.)

21. Fill in the 23rd slide: **Your Current Facebook Audience.**

- a. Obtain the client's Access Audit.
- b. Obtain admin privileges of the client's Facebook Ad Account.
- c. Go to <https://business.facebook.com/>.
- d. Choose [Blitzmetrics Business Manager](#).
- e. Click Business Manager Menu and Choose AUDIENCE.
- f. On the Upper Right Side, there is a Dropdown button, make sure you are in the right account.
- g. Click ALL AUDIENCES.
- h. Take a screenshot.
- i. Add a 3 sentence explanation of what you see.

22. Fill in the 24th slide: **Your Audiences That Are In Active Campaigns.**

- a. Obtain the client's Access Audit.
- b. Go to <https://business.facebook.com/>.
- c. Choose [Blitzmetrics Business Manager](#).
- d. Click Business Manager Menu and Choose AUDIENCE.
- e. On the Upper Right Side, there is a Dropdown button, make sure you are in the right account.
- f. Go to FILTER and choose STATUS: In Active Ads.
- g. Take a screenshot.
- h. Add a 3 sentence explanation of what you see.

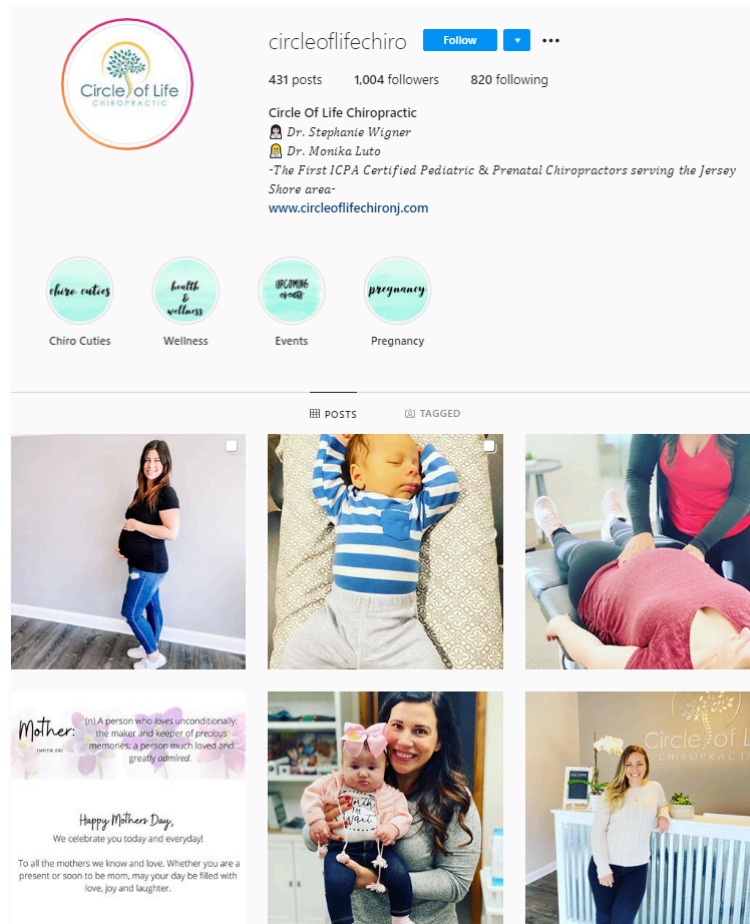
23. Fill in the 25th slide: **Performance of Active Campaigns.**

- a. Obtain the client's Access Audit.
- b. Go to <https://business.facebook.com/>.
- c. Choose [Blitzmetrics Business Manager](#).
- d. Click the Business Manager Menu and Choose ADS MANAGER.
- e. On the Upper left side, right next to CAMPAIGNS.
- f. Choose the right Ads Account.
- g. Go to CALENDAR on the right side of the screen.
- h. Choose the last 30 days (If you can't see any result, choose up to the last 180 days from today).
- i. Take a screenshot.
- j. Add an explanation of their results.

24. Fill in the 26th slide: **Instagram Analysis.**

- a. Use <https://www.ninjalitics.com/> for Instagram Analysis
- b. Check the following:
 - i. Followers:

- ii. Likes.
 - iii. Monthly average post.
 - iv. Pinned Post.
 - v. Authoritative Cover Photo.
 - vi. Type: Business Page.
- c. Take a screen capture of the client's Instagram account.



- d. Copy the image and paste it into the quick audit slide deck.
- e. Include a simple analysis and recommendation of the client's Instagram account.
- i. Follower to the following ratio.
 - IF the client has a positive following to follower ratio (MORE followers than following), THEN say:
"On your Instagram, your following to follower ratio is positive. This indicates more interest in your brand and in your content that you are posting. By having a larger follower base, it also allows more people to see the content that you are creating. Continue to engage with your community and keep an eye out for the content

that is performing the best, you can place this in your greatest hits and keep it evergreen.”

- IF the client has a negative following to follower ratio (FEWER followers than following), THEN say:
“On your Instagram, your following to follower ratio is negative. This indicates less of an interest in your brand and in your content that you are posting. By having a smaller following base, the engagement in your content is significantly less. Your content could also come across as spammy. We recommend creating great content and amplifying that content to different audiences which you can further optimize. We also recommend staying engaged with users who are connecting in your company.”

- ii. Analysis of content engagement and type of content post.
 - Take 45-50 seconds to provide analysis on the client engagement (video views, likes, and comments) on their Instagram.

25. Fill in the 27th slide: **Twitter Analysis.**

- a. Go to the client’s Twitter Account.
- b. Check the following:
 - i. Number of followers.
 - ii. Number of accounts followed.
 - iii. Tweets in the last 180 days.
 - iv. Date of last Tweet.
- c. Take a screen capture of the client’s Twitter account.
- d. Copy the image and paste it into the quick audit slide deck.



- e. Include a simple analysis and recommendation of the client's Twitter account.
 - i. Check the client's follower to following ratio.
 - IF the client has a positive following to follower ratio (MORE followers than following,) THEN say:
"On your Twitter, your following to follower ratio is positive. This indicates more interest in your brand and in your content that you are posting. By having a large follower base, it also allows more people to see the content that you are creating. Continue to engage with your community and keep an eye out for the content that is performing the best, you can place this in your greatest hits and keep it evergreen."
 - IF the client has a negative following to follower ratio (FEWER followers than following), THEN say:
"On your Twitter, your following to follower ratio is negative. This indicates less of an interest in your brand and in your content that you are posting. By having a smaller following base, the engagement in your content is significantly less. Your content could also come across as spammy. We recommend creating great content and amplifying that content to different audiences which you can further optimize. We also recommend staying engaged with users who are connecting in your company."
 - ii. Analysis of content engagement and type of content post.
 - Take 45-50 seconds to provide analysis on the client engagement (retweets and likes) on their Twitter.

26. Fill in the 28th slide: **Conclusion.**

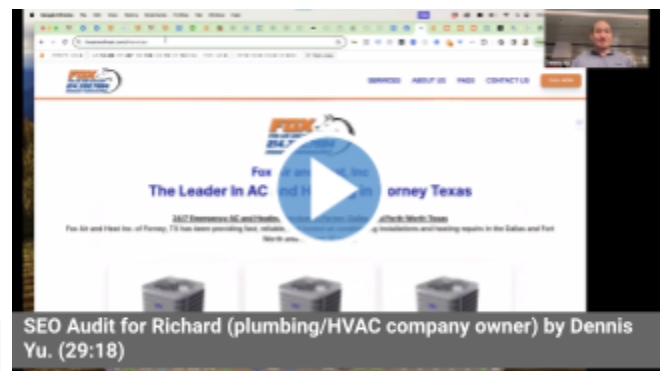
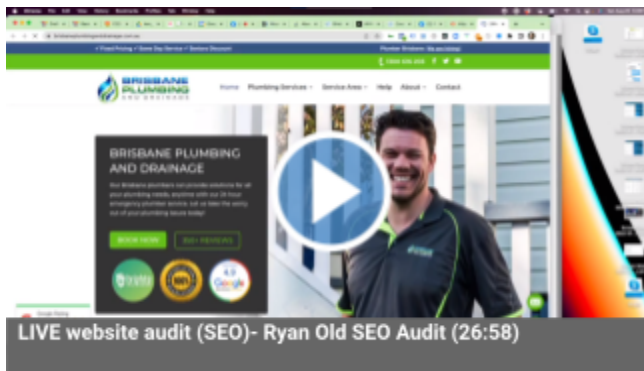
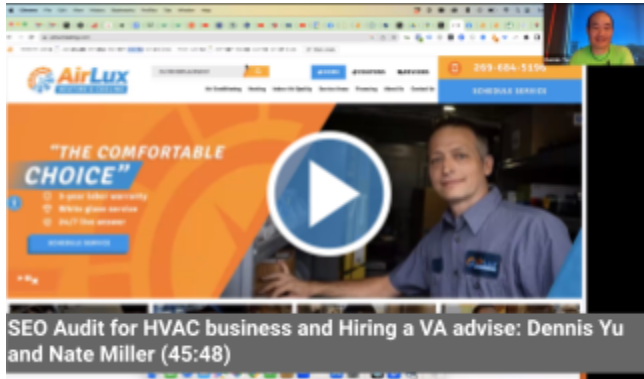
- a. Include the following:
 - i. Actionable steps to reach the client's Goals.
 - ii. Recommendations.
 - iii. Action Plan.
 - iv. Updated COURSE and GUIDE LINKS.
- b. Color code or group items paid for already, marked by in-progress, To Do, and Done. Follow our #GSD model-- what we've done, what we're going to do (part of package or what we recommend).

27. Fill in the 29th slide: **Optimization Team.**

- a. Make sure you have the photos and designation and email address of the following:
 - i. Dennis Yu.
 - ii. Specialist.

- iii. Your Team Lead.
- iv. Your Name.
- b. Add the link to the Basecamp Project.

Live Audit Examples



How To Assign A Quick Audit

Canned Note for Basecamp to-do/task for Quick Audit Part 1

1. *Duplicate the template.*
2. *Move the duplicate to the client's Folder.*
3. *Rename the duplicate.*
4. *Conduct the Quick Audit Part 1.*

Bounty price: \$10.

Asset Folder: [Paste folder URL here]

Name: [Paste business name or client name here]

Quick Audit QA Checklist

Quick Audit Quality Assurance Checklist

- Specialist has evaluated the **GCT** strategy assessment form.
- Specialist has created a **Snapshot Report**.
- The client's website contains Sitewide HTTPS.
- Assessment if your website contains site-wide HTTPS.
- Digital plumbing using Google Chrome extensions.
 - Using Google Chrome extensions to see what you have and do not have implemented.
 - Facebook Pixel.
 - Google Tag Manager.
 - Google Analytics.
 - Google AdWords Remarketing Pixel.
- Grabbing website speed using Page Speed Insights and TestMySite.
 - Comparison of your speed and optimization for mobile and desktop.
- Facebook Page analysis.
 - Content distribution in the Facebook funnel (Awareness, Engagement, Conversion).
 - Analysis of your content posted.
 - Strategies and solutions based on content.
- Facebook Video analysis.
 - Average video length.
 - Analysis of engagement and video views.
- 3x3 video grid** overview.
 - WHY, HOW, WHAT content.
 - Grabbing a 10-second video viewer audience of your winners.
 - Creating if/then sequences that strings your WHY, HOW, WHAT content.
- Instagram analysis (if applicable).
 - Follower to the following ratio.
 - Analysis content engagement and type of content post.
- Twitter analysis (if applicable).
 - Check the client follower to the following ratio.
 - Analysis of content engagement and type of content post.

Congratulations!



You have completed the Quick Audit Guide!

Now move on to the **Standards of Excellence** Course.



I want you to do it for me!

For \$3,500/month for 90 days (3 months), we will:

Digital Plumbing

- Facebook Pixel Tracking.
- Website Traffic Tracking.
- Remarketing Audiences and Page Engagers.

Video Transcription & Editing

- Monthly 3x3.
- Cross Posting To YouTube.
- Cross Posting To Site.

Facebook For A Dollar A Day

- Company Page.
- Public Figure Page.
- Minimum of 50 pictures and 9 videos organized into a minimum of 3 folders.
- Weekly Post To Facebook.
- Boost 3 x 3 video grid, a total of 9 videos.
- Add "Greatest Hits" To Content Library.

Website

- Cross Posting Reviews And Testimonials.
- Weekly Conversion.
- Blog Posting And Management.

Google My Business

- Weekly Post to Google My Business.
- Featured Video.
- 9 videos.
- 50 photos.
- Short Name Reserved.
- 100 Reviews And 10 New Reviews Per Week.
- Add 5 questions to Google My Business (GMB) and answer all 5 questions

YouTube

- At Least 10 Videos, Of Which 5 Are Vertical Videos Less Than One Minute (YouTube Shorts).
- At Least 1,000 Channel Views In The Last Month, Paid Or Organic.
- Cover Photo.

Reporting

- Weekly "What We've Done, What We're Going To Do, And What We Need From You."
- Weekly **#MAA**: Metrics, Analysis, And Action On Active Campaigns.
- Monthly Strategy Call.






Do it for me!

blitzmetrics.com/cep/

Thank You!



Dennis Yu
CEO and Founder
Content Factory

-  > @getfound Public Page
-  > @dennisyu LinkedIn
-  > @dennis.yu Instagram
-  > @dennisyu Twitter
-  > dennis-yu.com Website



For media inquiries,
please contact

stephanie@yourcontentfactory.com

Appendix

References

- How to Fill out a Quick Audit for a Client
<https://drive.google.com/file/d/1Q0aXZVjILcV9u42IGv2RjzHPig5MocBA/view>
- quick_audit_chirorevenue_version_template
https://docs.google.com/presentation/d/1D6wrZJRtWv9WIDdY9NYUSoalMrK0s10hWwG1Z_EQQpc/edit#slide=id.g4c50bc5147_0_0
- Quick Audit_MASTER VERSION_TEMPLATE
https://docs.google.com/presentation/d/1D6wrZJRtWv9WIDdY9NYUSoalMrK0s10hWwG1Z_EQQpc/edit
- Sample_Audited_Dr Addison Bulosan_Quick Audit
https://docs.google.com/presentation/d/1eU1p2cTTbGp1CUrcoDf_WsApzftW8Y3VpFWKX99ccTo/edit#slide=id.g4c50bc5147_0_0
- Template_Quick Audit
https://docs.google.com/presentation/d/1fxWXXpymRbPjyomiWrL29Edm4Zskz1PogDczp6vr0yU/edit#slide=id.g4c50bc5147_0_0
- Copy of Quick Audit Checklist_7_20_2020
<https://docs.google.com/document/d/1ybazCHEVljRln0ywVd0NuBBXe7lz6gVV6Q7lFYZKFQs/edit>
- Erik Simms_Quick Audit
https://docs.google.com/presentation/d/1CWHE1HiBfwFgbLUjiGGmZQBhTNEMv7x_qvXIOt5N9k/edit#slide=id.g4c50bc5147_0_0
- CHIROREVENUE_snapshot_report_v1.1_2020_1020-
<https://drive.google.com/file/d/1J6zQoTgiV4Emfwd70eRps3uXX7BxeFTD/view?usp=sharing>
- Quick Audit Slide Order.pdf
<https://drive.google.com/file/d/1KgG7HK1mtlLdG-ogOI5tv8Oi7d7XwzQl/view>
- (1351) How to fill out the quick audit deck
<https://www.youtube.com/watch?v=qGJudSr9UO8>
- Quick Audit Part 1 and 2 TEMPLATE MASTER - Google Slides
<https://www.loom.com/share/518e0f7eebe04f5faf91dd4cd48f3324>
- Chirorevenue_Quick Audit Checklist_ver 1_102920
https://drive.google.com/file/d/1f8_1HTzh8izv4DIV64BK6gbnK8saK6Eo/view
- General Quick Audit <https://3.basecamp.com/4057320/projects/8372199>
- R. Success Tracker updated
https://3.basecamp.com/4057320/buckets/22670601/todos/3930032339#_recording_3998039887

Pending Process Updates

1. 3x3 video grid overview

- ❑ WHY, HOW, WHAT content.
 - ❑ *"Your WHY, HOW, and WHAT content is important in your 3x3 video grid. The 3x3 video grid consists of 9 total videos in each part of your funnel. Your WHY content explains the mission of your company. Your HOW shows the educational value of your products and sets to educate your customers more about the value you provide. Your WHAT is the clear call to action where you sell your product and drive conversions. Together these three pieces of content work to help drive conversions by making sure your customers are getting multiple and warmer touches. By having a warmer audience with multiple touches, your conversion rate is higher."*
- ❑ Grabbing a 10-second video viewer audience of your winners.
 - ❑ *"When utilizing your WHY, HOW, and WHAT 1-minute videos in your funnel, the most important thing will be grabbing your custom audiences. Custom audiences allow you to remarket to those who watch your 1-minute video for 10 seconds or more. Grabbing the 10-second custom audience will allow you to remarket with your HOW or WHAT content providing multiple touches and sequencing out those users consistently showing interest in your product and brand. By sequencing out to interested users, when you run an ad with a clear call to action button, there will be an increase in your conversion rate due to sequencing out those who may not show consistent interest in your brand."*
- ❑ Creating if/then sequences that strings your WHY, HOW, WHAT content.
 - ❑ *"If/then sequences will move your customers down your sales funnel by telling your company's story. When creating these sequences, you will ask: if a customer watches my WHY content, then what? If someone watches my WHY content, then what? Perhaps you can show them an educational article, or maybe an educational video. From there you can drive conversion with a call to action button. You can see that we have a clear beginning, middle, and end. Creating these if/then sequences not only allows you to spend your ad money more efficiently but it also makes sure your warmer audiences convert when given a clear call to action."*

Hi Teresa, Here is the list of clients for Quick Audit:

J Zubire: JL Club Facebook Mastery: J Zubire - for JL Club

Wahida Clark: Tasks - JL Club Facebook Mastery: Wahida Clark for WClarkpublishing

Meera Setty: Tasks - JL Club Facebook Mastery: Meera Setty for JL Club

Quick Audit Guide: Master Quick Audit Guide

You could use the following to search for information you need to create the snapshot report:

Facebook Mastery Sales Sheet

Keap or Infusionsoft and Vendasta account : get access from Mel

Note: These particular group of clients doesn't give access to their assets (accounts) so just check their social handles instead online and get what ever information you need there.

If the client doesn't have website, company, or address we won't be able to create a snapshot report but please check their details first in the FB mastery sales sheet, then check Keap, you could also check in the google drive if they have existing information that you could use (you could find their photos there and documents related to them), check their website online as well sometimes the information you need is just there.

Message from Tucker:

Once the snapshot report is created, you can go to the accounts panel and the business should show up. If it doesn't, refresh the page and it should be there

Sometimes with small clients like this, that are not on a retainer, are hard to find in Vendasta because either they don't have a website, or don't have a recognized business in Vendasta. If that's the case, go to website.grader.com and insert the website URL to get a similar report. If the client doesn't have a business name or website, there is nothing we can do to run a report. You will be able to find the business name and website (if they have one) in the google sheets document.

Should you have any questions please let me know or Tucker.

Thanks.

P.S. The template is in the Master Quick Audit Guide just make a copy and it will also guide you in filling up the template.

Hey Juan, Here are the links for the calls I had with Tucker. We had another one this morning but I couldn't download it. It was Tucker who record it.

Source:

https://3.basecamp.com/4057320/buckets/8372199/messages/1405018481#_recording_4222974386

Thanks. I will just ask him again later.

Thanks.

Bernadette

1.) Video Sent by Tucker for Scheduled Posting for

Clients: <https://discordapp.com/channels/@me/88>

(<https://www.loom.com/share/4088e6ef5d964563b9107930fbc275a>)

2.)

https://drive.google.com/file/d/1nq7shJxMPz0TSergxaDV44vmPucB_tKw/view?usp=sharing

(https://drive.google.com/file/d/1nq7shJxMPz0TSergxaDV44vmPucB_tKw/view?usp=sharing)

3.)

https://drive.google.com/file/d/17iPQNG-5bAiVcGcCHBTfMfkLw_TT0-es/view?usp=sharing

The video and guide ([Master Quick Audit Guide](#)) does not match the tool we use to create a snapshot report (interface on video and steps in guide are different).

Source:

https://3.basecamp.com/4057320/buckets/8372199/messages/1405018481#_recording_4222974386

On the guide and video it shows
<https://partners.vendasta.com/login>

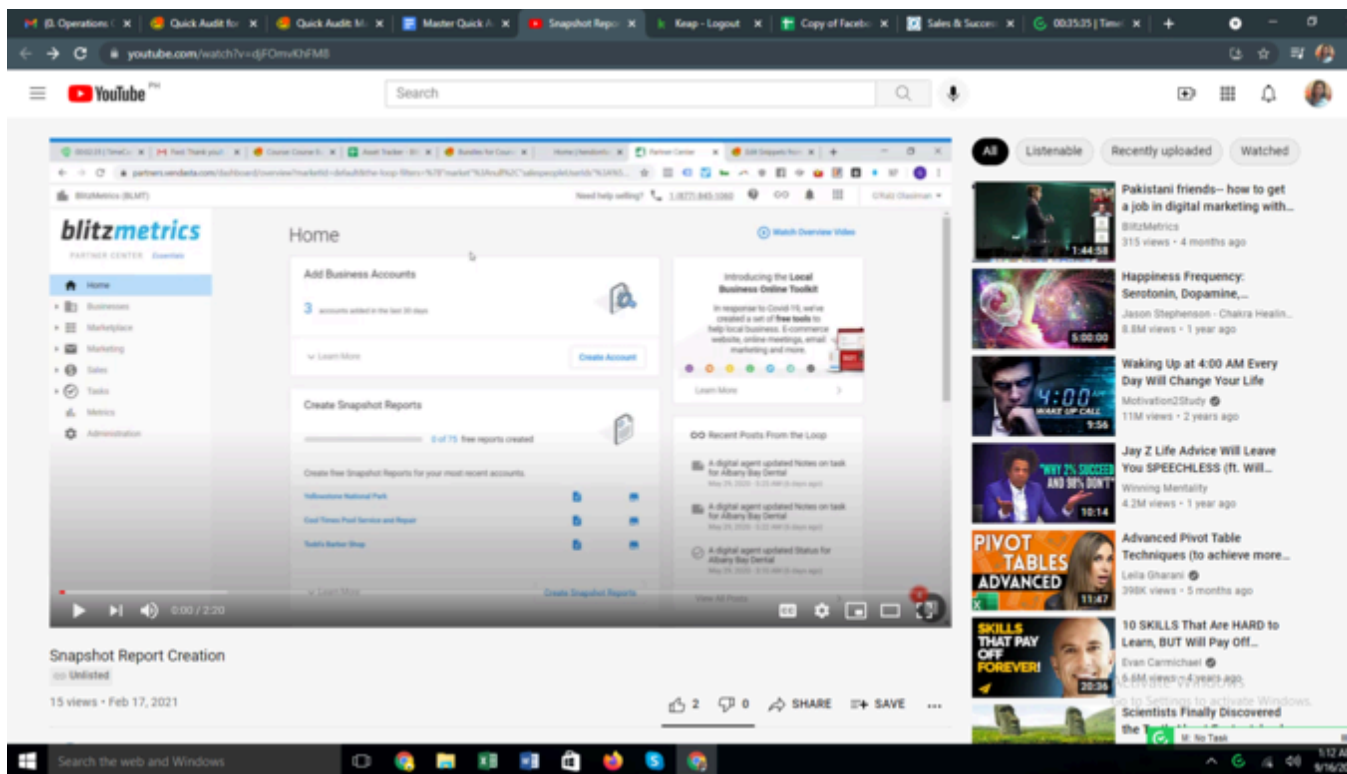


image.png 734 KB [View full-size](#) [Download](#)

and we are using

blitzmetrics.snapshotreport.biz/dashboard

BlitzMetrics (BLMT) Teresa Aprelo

blitzmetrics

SALES & SUCCESS CENTER

- Dashboard
- Accounts
- Pipeline
- Calendar
- My Meetings
- Leaderboards
- Orders
- Tasks
- The Loop
- Resources

Dashboard Top performers

Date range: Last 30 days [+ Add filter](#)

Activity by salesperson

Salesperson	Activity
Bernadette Plaza	4.5
Tucker Monheimer	2.5
Dennis Yu	1.5
Mary Jane Maragulla	0
Melanie Soliman	0

[View further insights](#)

Tasks

No tasks exist
Create tasks to see a summary here

[Create a task](#)

Opportunities

[View further insights](#)

Upcoming meetings

Create a booking link
Let people book meetings with you by creating a booking

Recently updated accounts

- RE/MAX Competitive Edge Bernardville Office
- Liy Technologies

Recently online accounts

Activate Windows
Go to Settings to activate Windows.

Search the web and Windows 11:11 AM 3/16/20

Screenshot (94).png 133 KB [View full-size](#) [Download](#)