

CRO Consultants

B2B / Lead Generation CRO Audit Checklist

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In B2B and lead-gen contexts, optimizing for qualified leads and fast follow-up is key. This checklist applies a conversion-focused lens to streamline form friction, map user journey stages, and orchestrate trust-enhancing touchpoints.

Form & Lead Capture

Use simple initial forms (name, email, role)

| **Why it matters:** Increases completion rates.

Implement progressive profiling for returning users

| **Why it matters:** Gathers rich data without large initial friction.

Display clear post-submission messaging (“We’ll reach out in 24 hrs”)

| **Why it matters:** Manages expectations and builds trust.

Value & Relevance

Tailor messaging for target use-cases or industries

| **Why it matters:** Attracts qualified interest.

Feature case studies/testimonials relevant to user industry

| **Why it matters:** Boosts resonance and credibility.

Show certifications, partner badges, and trust seals

| **Why it matters:** Reinforces authority in competitive sectors.

Scheduling & Meetings

Provide calendar-based demo booking on-site

| **Why it matters:** Reduces friction for converting prospects.

Use personalized CTAs (“See [Industry] demo in 15 minutes”)

| **Why it matters:** Increases engagement with tailored invites.

Highlight call/demo length and agenda

| **Why it matters:** Removes ambiguity for busy decision-makers.

Pipeline & Follow-Up

Track lead conversion by source/channel in CRM

| **Why it matters:** Identifies the most valuable marketing channels.

Automated follow-up triggered via email/phone

| **Why it matters:** Rapid follow-up boosts qualification and conversion odds.

A/B test form formats, CTAs, and messaging

| **Why it matters:** Data-driven optimization helps identify top-performing variants.

Ready to boost your conversion rates?

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