

# **THE BEGINNER'S GUIDE TO CONVERSION RATE OPTIMIZATION**

Qualaroo

A stylized blue graphic of a snake or worm-like creature, positioned behind the Qualaroo text in the bottom left corner.



# **THE BEGINNER'S GUIDE TO CONVERSION RATE OPTIMIZATION**

Qualaroo



# Start

The Beginner's Guide to Conversion Rate Optimization (CRO) is an in-depth tutorial designed to help you convert more passive website visitors into active users that engage with your content or purchase your products.

This guide will walk you through the basics of CRO—from why it matters in the first place to how you can go about building your own testing and optimization plan. You'll find information that will help you improve the performance of your website, including: optimizing your landing pages and user experience, as well as the tools you'll need to be successful.

This is a guide to help you map your way through the common CRO pitfalls and misconceptions by starting from the ground up—making insight-driven changes and then testing them for efficiency every step of the way.

## **First, a quick definition...**

CRO is the method of using analytics and user feedback to improve the performance of your website. CRO can be used to improve any metric on your website that's important to your business—often called key performance indicators

(KPIs)—that you’re trying to improve, but it’s often associated with acquiring new customers, registrations, downloads, etc. Put another way, it increases the percentage of website visitors who experience the “aha moment” (or the must have user experience) that turns passive browsers into valuable conversions.

At its most fundamental, CRO means figuring out what users are looking for when they arrive at your site and then giving that to them. CRO takes many different forms, based on the KPI you’re trying to improve. Sometimes this involves making your call-to-action more apparent or placing it on a traffic-heavy (but under-optimized) page. At other times this means removing or relocating unnecessarily complicated or time-consuming steps from your conversion funnel, as the added friction can prevent a conversion from ever happening.

### **Why should you care?**

You should care about CRO for a few reasons. First, you are most likely paying for traffic to your site in one way or another, and a high conversion rate means a better return on that investment (ROI). It’s also much more cost-effective to convert a higher percentage of the visitors you already have than to attract more visitors. In addition to improving your ROI, optimization helps to defend against the limited attention span of your average visitor by giving them what they want before they tire of looking for it and move on. [1]

## **CRO is important!**

- Higher conversion rate = better ROI
- More cost effective than finding more visitors
- Defends against limited patience of visitors

It's important to understand, however, that optimization is about getting more of the right kind of customers—not just blindly optimizing the conversion rate of a given page or campaign. It won't do you any good if the people you're acquiring are the wrong fit for your business. It's important to keep the focus on optimizing to find more customers who will love your product and help you grow by spreading the word. Everything else is a waste of your time and resources.



# Chapter List

## **1: What is Conversion Rate Optimization**

In the introduction, CRO is defined as the method of using analytics and user feedback to improve the performance of your website. In Chapter 1, we'll discuss CRO in simpler terms and what it may look like for you.

## **2: Why Conversion Rate Optimization is Important**

You might find yourself in a situation where you can't immediately dive in to tackle what you know to be your biggest optimization issue without first making a case for CRO.

## **3: The Basics of Conversion Rate Optimization**

Many people choose to use Unique Visitors when determining their Conversion Rate. But whatever metric you ultimately decide on, consistency is key. Read on to learn the basics of Conversion Rate Optimization.

## **4: Building & Testing an Optimization Plan**

When it comes to constructing a Conversion Rate Optimization Plan, people typically take one of two approaches: applying popular Conversion Rate Optimization tactics or building a Conversion Rate Optimization plan.

## **5: User Experience & Funnel Optimization**

When we talk about user experience (UX), there's more to it than just looks. We are referring to the totality of visitors' experience with your site.

## **6: Landing Page Optimization**

Chances are, if there's an under-optimized page on your site, your landing page is it. Yet many users' first impressions are based predominantly on this page.

## **7: Reducing Bounce & Exit Rates**

Despite the depths of the Internet and the billions of pages offered, users are arriving at your website, and then without any explanation—they're leaving. Why?

## **8: Myths about Conversion Rate Optimization**

In this guide we've touched on the many Conversion Rate Optimization myths. In this chapter, however, we're going to discuss them in a bit more detail.

## **9: Tools to Test & Optimize Conversion**

If you're looking for a basic explanation of which tool does what and how, you'll find that here. If you want recommendations, you'll find those as well. To say there is a tool for every job is an understatement.

## **10: Measuring Conversion Efforts & Calling Winners**

How do you know which tests are improvements and which ones aren't moving the needle? And more importantly, what will you do once you've called the winners and optimized your first set of tests?

## **11: Bonus Advanced Tips & Hacks for CRO**

Here is a composite list of additional hacks and tips that we have collected to keep you on top of the game.

## **12: Conclusion**

Now that you're a CRO pro, what's next?



# What is Conversion Rate Optimization?



What we mean when we talk about conversion is when a visitor to your website takes an action that you want them to take.

But what does that look like to you? It could be signing up for an email newsletter, creating an account with a login and password, making a purchase, downloading your app, or something else entirely.

Whatever it is you want your visitors to do, this action is what you are going to measure and what you are looking to optimize.

In the introduction, we briefly defined CRO as the method of using analytics and user feedback to improve the performance of your website. Here's an even simpler definition: conversion rate optimization is finding why visitors aren't converting and fixing it. [1]

## Conversion Rate Optimization Is...

- A structured and systematic approach to improving the performance of your website
- Informed by insights—specifically, analytics and user feedback
- Defined by your website's unique objectives and needs (KPIs)
- Taking the traffic you already have and making the most of it

## Conversion Rate Optimization Is Not...

- Based on guesses, hunches, or what everyone else is doing
- Driven by the highest paid person's opinion
- About getting as many users as possible, regardless of quality or engagement



## A Few Key Terms...

These are concepts and ideas that will come up again and again in this guide, so now is the time to familiarize yourself with them.

### **Call to Action (CTA)**

The primary button, link or other user interface element that asks the user to take an action that leads to (or towards)

a conversion. A “Buy Now” button on Amazon.com, a “Sign Up” button on an email registration field, a “Download Now” on an app landing page are examples of different Calls to Action.

### **Conversion Funnel**

The primary pathway (or flow) of the user experience where visitors complete a conversion. On Amazon.com the funnel may be Home page > search results page > product page > checkout.

### **A/B or Split Testing**

The testing of one version of a page or interface element against another version of the same thing. Each element is measured by its effectiveness in comparison to the other. For example, a red button measured in effectiveness to a green button. In A/B testing only one thing is tested at a time.

### **Multivariate Testing (MVT)**

The testing of multiple variations of many different page elements in various combinations to determine the best performing elements and combinations. For example, a multivariate landing test may test many variations of the pictures, copy, and calls to action used on the page in many combinations to find the best performer.

## **Now About Those Statistics...**

Here’s an overview of the things you are going to measure in order to gauge your current rate of conversion, identify the

trouble spots, and design a plan of action. You can get these numbers through Google Analytics, KISSmetrics, or another analytics service of your choosing. The numbers critical to CRO are as follows:

## Let's start with the numbers we're looking to improve –Conversion Rates

- 1 Your Total Conversions is number of people who did whatever it is defined as converting (email newsletter, made a purchase, and so on).
- 2 To get your Conversion Rate, you divide the above total number of conversions by the number of visitors to your site.

**For example, a site with 5000 visitors and 50 conversions has a conversion rate of 1%.**

But how long are people spending on your site? Which pages are they visiting while there? This next set of numbers can help you to form some testable hypotheses. Looking at your Bounce and Exit Rates, as well as your Engagement Metrics, is the first step in making sense of your conversion rate.

These are the metrics that matter. Take the example above—the site with 5,000 visitors per month but only 50 conversions could either pat themselves on the back for all those unique visitors or recognize that their conversion rate

### 3 Bounce Rate

Your Bounce Rate is the percentage of people who leave after viewing a single page. A high bounce rate is not a good thing—for whatever reason, people aren't finding what they're looking for so they leave almost immediately.

### 4 Exit Rate

You also have a specific Exit Rate for each page; it's the percentage of people who leave after viewing the page. Your exit rate lets you know the last page that users view before they move on. A very high exit rate on a specific page can be a red flag.

### 5 Average Time on Site

An Engagement Metric, the Average Time on Site of users gives you a general idea how long people are sticking around. A high bounce rate means a low average time on site — visitors aren't sticking around long enough to do whatever it is you want them to do.

### 6 Average Page Views

Similarly, Average Page Views is an Engagement Metric that tells you how many pages the average visitor goes through before leaving. More page views can mean engagement but also can mean a lack of clarity in your conversion funnel, if there is no conversion.

could be much better than 1% and then work to optimize those numbers.

---

Chapter 1 Notes

[1] <http://moz.com/blog/thedefinitivehowtoforconversionrateoptimization>

# Why Conversion Rate Optimization is Important



## Making the Case for CRO

In the introduction, we touched very briefly on the importance of CRO, but this chapter will go into much more detail regarding all the ways optimization can help you grow your website.

Often times one of the biggest optimization challenges has little to do with the site itself, and everything to do with lack of organizational support. Because of this, you might find yourself in a situation where you can't immediately dive in to tackle what you know to be your biggest optimization issue without first making a case for CRO.

Our advice for those in this situation is to start out small—try to run a few surveys or collect feedback that points to potential confusion in your conversion funnel. If you are responsible for updating the site, you can run small scale tests to optimize elements that, while important, are easier to manage and have less attention being paid to them. Work on improving these metrics through surveys and testing—a mini

CRO test—so that ultimately you can demonstrate the value of CRO and get your organization on board.

In addition to these covert optimization operations, build team buy-in by doing one or a few of the following:

- Share the first couple of chapters from this guide
- Conduct surveys and identify problems that CRO could improve Record user tests of people experiencing issues
- Make it clear that a few tests aren't enough and that real gains only come from a carefully crafted strategy

Once you've gathered some convincing data—especially regarding the missed opportunities for conversion from the traffic you're already paying for—you'll be sufficiently prepared to argue your case.

## **Now, onto why CRO is so important:**

### **Reason 1: There is always room for improvement.**

No matter how well-designed your site is and no matter how many visitors you're converting into users, it's likely you could make the conversion process easier and more painless for them—leading to better results for you.

### **Reason 2: Paid advertising is only getting more costly and competitive.**

Spending more on it is not the answer, especially if there are hiccups in your conversion funnel that need to be addressed. CRO works with what you have to help you to identify and deal with those problems first.

**Reason 3: Optimization is about getting more of the right kind of customers.**

It's not just converting anyone. You are looking for people who will love your product and help your marketing efforts by telling everyone they know how great you are.

**Reason 4: It's essentially free.**

CRO capitalizes on traffic you already have. This means you aren't spending more money getting visitors to your site, just doing a better job of converting them once they get there. Optimization increases the return on your current investments, and converting a higher percentage of your current visitors is much more cost-effective than attracting new ones.

**Reason 5: It lowers your customer acquisition costs (CAC).**

In fact, doubling your conversion rate means halving your cost-per-acquisition (CPA), or how much each new customer costs you.

**Reason 6: CRO helps maximize profits.**

Not only that, but your profit is intimately tied to your conversion rate. Because you aren't paying more to acquire these conversions, that profit goes straight to your bottom line. [2]

**Reason 7: It gives you more money to spend on additional acquisition.**

More profit means extra money to spend on acquiring new

users (plus, you already know where to spend it because you know which funnels are bringing in the rockstar users).

**Reason 8: It makes you more valuable to affiliates and partners.**

Not only will you earn more, but so will your affiliates—making you more valuable to them (while your competitors become less so).

**Reason 9: CRO circumvents the limited attention span of the average visitor...**

By giving them what they're looking for sooner (before they have a chance to find it somewhere else).



**Reason 10: It can mean winner take all.**

Based on the concept of the “slight edge” phenomenon (also known as “the winner takes all” or “the winner takes most”), all you need to be successful is to be slightly better than your competitors. So if you optimize your site to deliver what users want in just a slightly better or faster way, even if it’s just a few seconds faster, they are going to go with you.

**Reason 11: CRO creates momentum.**

It creates a powerful flywheel of momentum that will increase your market share. The better your conversion rate, the more traffic you can afford, the more customers you get, and so on. You're dominating your market before you know it. [4]

---

Chapter 2 Notes

[1] <http://www.conversion-rate-experts.com/cro-tips/>

[2, 3] <http://www.conversion-rate-experts.com/reasons-to-get-obsessed-with-cro/>

[4] <http://moz.com/blog/the-definitive-howto-for-conversion-rate-optimization>





## This is similar to how people shop online.

They sometimes look around a bit, they often get distracted, and they frequently check out the competition. And just like it wouldn't make sense for a salesclerk in the above scenario to be reprimanded for not making a sale during each of the customer's several visits, online stores shouldn't expect to make a sale for each visitor represented by the Total Visitor count.

For this reason, **many people choose to use Unique Visitors when determining their Conversion Rate.** But whatever metric you ultimately decide on, consistency is key. If you decide Total Visitors gives a more accurate measure of your conversion rate, be sure to use it consistently or your trends will be off.

**But there is a caveat: Currently "uniqueness" is measured by setting a persistent cookie, which isn't perfect or always reliable. [1]**

You must also determine what time period you want to use in determining your Conversion Rate. Again, consistency is key here. Dividing a week's Unique Visitors by the number of people who converted that week, and you've got that week's (or day's, or month's) conversion rate. It's not a good idea to add up daily unique visitors to make up a week or month. [2]

Now that you know your current Conversion Rate, you can begin looking for barriers in your Conversion Funnel.

## Identifying barriers in your conversion funnel

As we discussed in Chapter 1, at its most basic level Conversion Rate Optimization is simply finding why visitors aren't converting and fixing it. **Rather than a series of guesses and hunches, CRO is a "process of diagnosis, hypothesis and testing."** [3]

Any CRO strategy should begin with you putting yourself in your visitors' shoes and looking closely at your site — specifically your Conversion Funnel. Where are the confusing or difficult points? These are the barriers standing in your visitors' path to conversion.

### Here are some areas you should take a look at:

- To start with, is your **Call to Action** clear and easy to find?
- Are your **Graphics** relevant, well-placed, clean, and unique? Or are they distracting and overwhelming in number? Do you have a lot of unnecessary (or maybe misplaced or not-yet-necessary) text?
- Take a look at your site's **Usability**. Can users easily search your site for what they're looking for? If you're in e-commerce, is it easy to complete your checkout process? How many pages and clicks does it take to complete the key conversions you're measuring? Is there a mobile version of your website? Keep your navigation, registration, contact, and payment uncluttered and easy to find and operate.

- Is it clear to your visitors that their **Security** is your top priority? Is it easy to trust your site?
- Are your **Search Engine Optimization** efforts up-to-date, accurate, and relevant? Are you using accurate titles, relevant keywords and proper meta data? Images should have correct names, and keywords should be used properly. Titles should be clear and descriptive. If these items are not relevant, people may be coming to your site looking for something you don't offer, while those who seek your services are unable to find you.
- Do you have **Customer Testimonials** letting visitors know how happy others are with your services? Social proof is a powerful conversion rate driver. [4]



**But this list is by no means comprehensive, and what succeeds for one site might actually hurt the user experience (and therefore conversion rate) on another.**

This is because each site has its own unique mission, strengths, and challenges. You

may read reports of amazing success from changing button colors, but it's important to realize that generalized tweaks like this don't resolve more serious problems like the ones listed above.

## For both types of conversions, your conversion rate hinges on six factors:

- 1 Value proposition**—This is the sum of all the costs and benefits of taking action. What is the overall perceived benefit in your customer’s mind? Those perceived costs and benefits make up your value proposition.
- 2 Relevance**—How closely does the content on your page match what your visitors are expecting to see? How closely does your value proposition match their needs?
- 3 Clarity**—How clear is your value proposition, main message, and call-to-action?
- 4 Anxiety**—Are there elements on your page (or missing from your page) that create uncertainty in your customer’s mind?
- 5 Distraction**—What is the first thing you see on the page? Does it help or hurt your main purpose? What does the page offer that is conflicting or off-target?
- 6 Urgency**—Why should your visitors take action now? What incentives, offers, tone, and presentation will move them to action immediately?

Barriers in your Conversion Funnel will still exist, and there's only so much you and your team can do to identify them. Ultimately, you will have to reach out to your users and ask them what about your site isn't working (more on that in Chapter 5).

---

#### Chapter 3 Notes

[1,2] <http://www.kaushik.net/avinash/excellent-analytics-tip5-conversion-rate-basics-best-practices/>

[3] <http://moz.com/blog/seogadget-guide-conversion-rate-optimization>

[4] <http://www.google-search-engine-optimization.com/2012/12/5-basics-of-conversion-rate-optimisation.html>

Source: <http://blog.kissmetrics.com/conversion-strategy-trumps-tactics/>

# Building and Testing an Optimization Plan



When it comes to constructing a Conversion Rate Optimization Plan, people typically take one of two approaches: **applying** popular Conversion Rate Optimization **tactics** or building a Conversion Rate Optimization **plan**.

## When applying CRO tactics, you...

- Are equipped with a toolbox of suggestions and quick fixes—like changing button color
- Rely on tips and tricks that have worked for others, hoping for the best
- Are only focused on elemental concerns
- Pay little attention to analyzing customer behavior
- Have a starting place, but no clear plan of action... so you make more guesses or seek out more tips and tricks

## By contrast, When building a CRO plan, you...

- Attempt to figure out what the numbers mean before trying to fix them

- Form a hypothesis (or hypotheses) based on those test results
- Construct a plan of action to test those hypotheses
- Take the knowledge gained and use to it form new hypotheses
- Understand this is a consistent, structured, and ongoing process of making your website better over time

For example, a new source of traffic is added to a test page, and the conversion rates drop. If you are working from a set list of optimization tactics, you immediately begin tweaking page elements in search of “fix.” Conversely, when working from a strategic optimization plan, your first action is to attempt to figure why those numbers changed. Do the needs of this new traffic source differ from those of your established sources? If so, how? These questions are then followed by tests that attempt to answer them or, at the very least, help determine which tests to run next.

When you implement a conversion strategy, you do so knowing that a single tweak won't fix all your website's problems. You understand that even if a test fails to support your original hypothesis, the knowledge gained from the test still contributes to growing, changing understanding of how you can better serve your users.

So, now that you understand the importance of having a strategic Conversion Optimization plan, let's discuss how to go about constructing that plan. We've chosen to divide this planning into “phases” rather than “steps” in order

to emphasize the circular nature of a sound optimization strategy. Rather than thinking of these phases as a strict progression from one to the next, keep in mind that you will **revisit each one in order to continually address the needs of your users over time.**

## Phase 1: Lay the Groundwork

We've already covered the importance of identifying what "conversion" means to you, but we'll restate it again because it's that important. Before beginning any optimization strategy, you have to know what you're measuring and attempting to optimize. It's also important to understand what drives these conversions.

### For example...

You run a wedding planning business, and you have a form on your website that allows visitors to schedule a free fifteen minute video consultation. This is the conversion you want to measure and optimize.

But what drives this conversion? Testimonials from happy customers? Ad space on wedding blogs? Large photo galleries showcasing weddings you've coordinated?

It could be each of these things, or something else entirely. The only way you'll know is to isolate each variable on its own and measure how users behave under each set of circumstances.

Here is what a test plan for your wedding website might look like:

- Your goal is to increase your number of free video consultations, which, though free, often result in people choosing to use you as their wedding planner
- You hypothesize that adding testimonials may increase the number of free consultations scheduled
- You decide to compare conversion rates for when testimonials are prominently displayed versus when they are not (A/B split testing)
- You'll measure the number of consultations scheduled from each page to see if your hypothesis was correct. You will do this for each variable you want to better understand.

## Phase 2: Establish a Baseline

As we've discussed throughout this guide, a sound conversion strategy is based on some important metrics and tons of user input. But in order to work from that information, first you need to understand where you're starting from. This is called your baseline. Only by establishing your current performance can you measure the changes you make to find improvement.

You won't know if your optimizations actually improve unless you have numbers to compare them to. To establish your baseline for comparison, you will...

- Refer back to the goals you identified in Step 1
- Look at the metrics related to these goals. What is your

current conversion rate?

- Which are your best sources of traffic for this conversion?
- Run a user survey to figure out how well you are meeting these goals and what you could be doing better
- Employ user testing around these goals to establish how successful your site is at meeting them

### **Your basic toolbox will include:**

#### **Analytics**

Software to track and report on what's happening on your site day in and day out. You want an analytics package such as Google Analytics, KISSMetrics or similar that has advanced analysis tools like audience segmentation and conversion tracking. Segmentation can produce data for different sets of people, and you can isolate hiccups or trouble spots in your conversion funnel.

#### **User Surveys**

Analytics can only communicate so much about your users' needs; you need something that gives you the ability to gain insights directly from users in the moment, to hear their concerns in their own words; there is no such thing as too much user feedback.

#### **User Testing**

Software like Optimizely and other testing tools allow you to directly observe how users are interacting with your site. You can test potential changes and document how they play out in real life.

You now have the baseline against which all future changes will be measured. Whenever you alter something, compare performance before and after. How have your metrics changed? Your survey results? The ways in which users interact with your site? This is how you figure out if you make things better or worse.

### Phase 3: Form Some Testable Hypotheses

Now it's time to look at the baseline we established in the previous phase and identify your biggest barriers to conversion. What you want to do is identify the problem areas, implement those tools we just talked about to investigate, and then design some potential tests.

#### For example...



Via your analytics tool, you learn that the bounce rate for your wedding planning website is on the rise, so you use the page report feature to isolate it to your photo gallery—a popular but clearly under-optimized page. At this

point, you might decide to implement an on-page survey on that page in particular asking users what they're looking for and whether they were able to find it. You could also run some user tests to see what people are doing while there. You could install CrazyEgg to see where people are clicking, or how far they're scrolling on the page. Additionally, you could

ask a few of your customers at the store to look at the page and watch them try to navigate through it.

Take the information you get from testing and user surveying, and use it to form a hypothesis that attempts to explain why no one is sticking around on that page. Next, come up with some alternate versions of the photo gallery page.

This leads us to the next phase.

### Phase 4: Design Your Tests

In this phase you're going to take everything you've learned so far and design a test strategy. **Start by making a list of your priorities.** Which points of concern come up again and again in user surveys? What seem to be your sites biggest issues, and which ones do you need to address first?

Above all else, it's important to be methodical here. Double and triple check your numbers and keep a written record of absolutely everything.

Here are a few points to consider when designing your test...

- Start small—look for something that won't be too complicated to change and measure, but with real potential for improving conversion rates.
- Begin with simple A/B tests. Don't make too many changes at once—or you won't know if it's the more prominent call to action or the new and improved

testimonials that result in the improvement in your conversion rate.

- Think outside the box—if visitors aren't clicking "Schedule a Free Consultation," the answer isn't necessarily to make it red.
- Get a second opinion. If you designed the page, you may not readily spot the problem.
- Consider modeling results to see what kind of impact they might have. For example, if you can reduce your bounce rate by 10% at a certain point in the funnel, how many more conversions might that lead to? What effect would this have on your profit margin?
- You might have to lower the "risk bar" for your users.[2] Maybe you're asking too much too soon? Free trials and promotions can help to earn your users' trust sooner.
- To give your own numbers some perspective, you might want to look for benchmarks for other companies in your industry.
- Double and triple check that you have sufficient tracking in place so that you are able to interpret the effects of your test.
- Set a sample size and stick to it! Whatever you do, don't end your test early because you think you've found a

winner. You have to let your test run its course to be sure—more on this in Chapter 10. [3]

**For example...**

You believe the high bounce rate on the gallery page of your wedding planning website results from a lack of contact and brand information on this page. This page gets a lot of hits from external sources like Pinterest and wedding blogs, many of whom skim your photos and then leave unaware of the services you offer.

You decide to create an alternate version of the photo gallery page, adding a banner that reads, “Planning a wedding? I’d love to help. Click to schedule your free consultation,” sending them to your standard contact form.

**Phase 5: Run Your Tests**

You will measure success against the baseline you established in Phase 2. The data resulting from your test, when compared to your baseline, will tell you where to go from here.

If this test was a success, then great. Now, you can either cross this concern off your list and move on to the next one or continue refining and re-testing this page, making it as awesome as possible.

If this test wasn’t a success, don’t be discouraged. All this means is that it’s time to go back to Phase 4, reexamine the data, and design a new test. You learn as much from a

negative outcome as you do from a positive outcome.



### Keep in mind...

Regardless of the outcome of your initial round of testing, you should think of optimization not as an end goal but as an ongoing process. Because the way we do business is always evolving

and customers' needs change over time, you will never reach the point where you've run "enough" tests.

When you've improved a specific sticking point in your user experience, pat yourself on the back for a job well done, and then go back to Phase 3 and ask yourself what else can be improved upon. [4]

---

#### Chapter 4 Notes

[1] <http://blog.kissmetrics.com/conversion-strategy-trumps-tactics/>

[2] <http://www.conversion-rate-experts.com/seomoz-case-study/>

[3] <http://www.evanmiller.org/how-not-to-run-an-ab-test.html>

[4] <http://unbounce.com/conversion-rate-optimization/how-to-implement-a-conversion-rate-optimization-cro-process/>

# User Experience and Funnel Optimization



When we talk about user experience (UX), we are referring to the totality of visitors' experience with your site—more than just how it looks, UX includes how easy your site is to use, how fast it is, and how little friction there

is when visitors try to complete whatever action it is they're there to complete.

As it applies to funnel optimization, the importance of UX cannot be overstated. By carefully crafting your user experience, you can ensure the user stays on task and keeps moving through the funnel, having been given just enough information and options at each step.

## In your funnel optimization efforts, you'll be focusing primarily on two aspects of UX:

1. **Reducing friction** in the form of wasted clicks, excess pages, false starts, going to the wrong page, slow page loads, and other friction points that cause users to give up.

2. **Reducing cognitive overhead**—another version of friction—that puts doubt and indecision into the mind of the user, causing them to waver over whether to convert.



Projects usually begin with design briefs, branding standards, high-level project goals, as well as feature and functionality requirements. While certainly important, these documents amount to little more than the technical

specifications, leaving exactly how the website will fulfill the multiple user objectives (UX) wide open.

By contrast, if you begin by looking at the objectives of the user and the business, you can sketch out the various flows that need to be designed in order to achieve both parties' goals. The user might be looking to find a fact, order a product, learn a skill, download a document, and so on. Business objectives could be anything from getting a lead, a like, a subscriber, a buyer, and so on. Ideally, you'll design your flow in a way that meets both user and business objectives.

In addition to an awareness of user objectives, it's important to account for the different traffic sources and levels of knowledge and engagement in your user base. You must map those inbound user flows to conversion funnels that provide value to

the user (without neglecting those business objectives.)

When mapping out your user flows, start at the top—the point at which users first exposed to your site. You'll probably want to address the flows that impact the most users first.

### Here are a few examples of typical user flows:

- A user clicks into your site from a banner or Google AdWord ad (Paid Advertising)
- A user finds your site via a friend's post on a social network (Social Media)
- A user clicks into your site from a deep link that was surfaced by a search (Organic Search)
- A user sees you mentioned in the news or a blog post and visits your site (Press or News Item)

In each of these cases, the user comes with his or her own needs, expectations, and level of knowledge, and they need to be treated accordingly.

### For example...

Assume like many websites, one of your major sources of traffic is paid advertising. Let's follow the user flow from a paid channel from first exposure to conversion.

**It all starts with the banner or search ad copy**, which needs to achieve one precious goal: get a click from the right person.

## **When designing ads that represent the topmost point of your user flow, ask yourself the following:**

- What type of user am I targeting?
- Are they actively seeking a solution to a problem, or are they casually browsing?
- What problem are they trying to solve?
- How can I best capture the user's attention?
- How do I relate to the user?
- Is there a message that will resonate with the user?
- Is there a pain point that my product or website alleviates for the user?
- How can I articulate this solution clearly and quickly?
- What compelling calls to action will get our target user to click?

Look to the data you've compiled via analytics, user surveys, and user testing to ensure your ads speak to your users' motivations, and be sure to include a great hook.

So you've designed an ad that fulfilled its main objective, getting the user to the landing page. This is when the user flow work really begins. In this case, the user is coming from a low-information source—for example, your ad doesn't communicate as much as a press or news item. Because of this you must cater your flow to fills in the gaps of information, providing the data visitors need to feel comfortable giving you their email address (or whatever your desired conversion is). The key here is twofold: provide a reason to keep moving through the flow, down the funnel, and get rid to any reasons to stop and click out of the funnel. [1]

**In the next chapter we'll thoroughly cover the art of crafting a killer landing page, but below are a few methods of keeping the user moving through the funnel:**

- Articulate benefits and support them with simple proof points
- Organize your content and design to support—rather than distract from—your call to action
- Remove friction at every step by asking as little as possible from the user—the minimum amount of information and load time, the fewest number of fields and clicks
- Use a compelling headline or hook that creates a sense of anticipation in the user, propelling them through the last registration step.
- While some sites use tricks (also known as “dark or anti-patterns”) to drive conversion, the resulting growth is inauthentic.[2] Because they trick people, their reputation is ultimately damaged and their word of mouth referrals are hurt.

It's important to understand that converting every visitor isn't optimal. Rather, focus on designing your user flow in a way that nudges the right visitor toward the must-have experience. Further, once that visitor converts, the UX should make it easy for them to tell their friends about their great experience via social media and other sharing, driving new users into the funnel.

## Chapter 5 Notes

[1] <http://uxdesign.smashingmagazine.com/2012/01/04/stop-designing-pages-start-designing-flows/>

[2] <http://uxmatters.com/mt/archives/2009/01/antipatterns.php>

# Landing Page Optimization



Chances are, if there's an under-optimized page on your site, your landing page is it. Yet many users' first impressions are based predominantly on this page. When you first start reading up on CRO, you'll find tons of "rules" about what makes a great landing page.

As we've already discussed, however, what worked wonders for someone else might not produce the same results for you.

In addition, much of the landing page advice you'll find online relates specifically to pages that are created for the purpose of landing pages—pages tied to a paid advertising campaign to maximize conversion. Don't forget, however, that people land on many different pages of your site.

With Google responsible for 25% of the traffic delivered to

websites in the US [1], visitors are landing on product pages, contact us pages, blog posts and knowledge bases. When thinking about landing page optimization, it's up to you to look at the top landing pages for your business, and build a plan to optimize those pages for conversion.

### The bottom line...

While it's great to find inspiration from successful tests that others have run, don't count on them to produce the same results with your audience. Create your own hypotheses and tests to find the winners for your business.

### Landing Page Elements

If you scan several successful landing pages, you'll probably notice they several key elements in common—and for good reason, as these elements communicate critical information to users. For this reason they are excellent candidates for testing and optimization. Use KISSMetrics "Blueprint for a Perfectly Testable Landing Page,"[2] cited below, as a jumping-off point for constructing your own winning landing page.

- **The headline**—like on a newspaper, the goal of the headline is simply to get the visitor to read the next line, and so on. A great headline is a great hook that grabs the attention of the visitor.
- **Hero Image**—this is the primary image or creative element on the landing page. It should work with the headline, reinforce your value proposition and draw

people further in, toward the call to action or benefits.

- **Proof points**—these are benefits or other copy that “pays off” the promise laid out in the headline. If the headline is the hook, these articulate the promise.
- **Form or Call to Action**—depending on the type of landing page you have, you may have either a form to collect data, a call to action (like a button to download your app), or both.
- **Social Proof**—testimonials and other elements validate your brand or product. Our psychology is such that in the absence of perfect information, we will make similar decisions as others that we perceive to be like us.
- **Third-party endorsement**—to create trust and confidence, you can leverage existing brands that are recognizable by your target audience. Has your business been featured in a known news publication or used by a prominent client? You can confer some of the trust associated by their brand by using their logo on your page (with their permission of course).

## A Mnemonic for Landing Pages

In “**How to Make a Landing Page that C.O.N.V.E.R.T.S.**”, Beth Morgan offers a mnemonic for the landing page elements that lead to conversion. It is as follows:

## How to Make a Landing Page that CONVERTS:

**C = Clear Call to Action**

**O = Offer**

**N = Narrow Focus**

**V = VIA: Very Important Attributes**

**E = Effective Headline**

**R = Resolution-Savvy Layout**

**T = Tiddy Visuals**

**S = Social Proof**

You'll notice that Morgan's mnemonic and the blueprint that comes before it have a lot in common, and rightly so— these landing page elements work because they satisfy distinct and universal user needs and desires.

### Long-form vs. Short-form Landing Pages

**Let's discuss a bit of dogma regarding landing pages—** something you've almost certainly read again and again—the debate over whether landing pages should be short and minimal, or long and rich.

In the minimalist camp you'll often hear that “long form” landing pages don't sell. This is a myth. Long form pages can

be very effective. In the long form camp you'll often hear the opposite—that minimal landing pages don't give visitors enough information to make a decision, and therefore are poor performers. This is also a myth.

As a general rule, we've found that longer-form landing pages work for products that are more complicated in nature or that are newer to the market and need to build trust with the visitor. Shorter-form landing pages work for products that are very easy to understand or have strong existing brand awareness and trust with visitors.

Below, you'll find a few more guidelines for optimizing your landing page.

### Let's start with landing page copy...

- **Make whatever text you do have on your landing page as streamlined as possible** through editing, refining, and condensing. Your visitor will give you about 5 seconds before deciding to leave or stay. Your copy must be clear, concise and attention getting.
- But whether it's five sentences or five pages, **your landing page should engage users.** [3]
- **Don't jump the gun.** It's better to delay your "pitch" until visitors are fully engaged than present the call to action before they're ready for it. In other words, capture your visitors' attention before asking them to take action. This might mean presenting a quick product tour that shows

them how they can't live without your service before asking them to sign up for it. [4]

- Consider that you might be neglecting to **highlight the must-have experience**. Why do your most dedicated users come back again and again?
- Do you have resources—like promotions or **testimonials from well-known clients**—that are under-utilized? Make sure they're prominently displayed.

## Now for the other elements of your landing page...

- Whatever behavior you've designated as a conversion, users shouldn't have to search for it. Make the conversion visually obvious. A button, a phone number, a form. Whatever the element, it must stand out. Deemphasize, relocate, or remove other less important but visually distracting elements.
- **Don't overwhelm visitors with too many choices.** Provide a single call to action. If you have more than one choice, you haven't narrowed your landing page down to meet the intent of the visitor.
- Some people prefer audiovisual content, while others find text preferable. **Make sure to test what works best for your audience.**
- Understand why people are coming to your site in the

first place. Examine your best-converting or largest traffic sources and **make sure your landing page and associated ads and keywords accurately represent your value proposition**. You might learn that your bounce rate is high because visitors are under the assumption that, based on your ads, you offer something you actually don't.

- The best landing pages quickly build trust. **Let your users know they can trust you** by using elements such as safe shopping seals and trusted third party endorsements including: Verisign logo for e-commerce, logos of recognizable clients, publications you've been featured in, testimonials, etc.

If this chapter could be summed up in three words, they'd be: only the essentials. Think back to the basic definition of conversion rate optimization from Chapter 1—finding why visitors aren't converting and fixing it. Keep this definition in mind when optimizing your landing page. You're simply figuring out why visitors aren't converting (call to action is impossible to find? Aren't convinced of your trustworthiness? They're distracted by unnecessary images and links?) and fixing it.

### Case Study: Highrisehq Landing Page Optimization

In May of 2011, the folks at 37signals decided to run some A/B testing on their landing page design for Highrisehq.com. [5] Jamie of 37signals explains their reasoning, "Signups were going well, but we were worried that customers still couldn't

get the gist of what Highrise did and why they needed the product.” They used their original landing page as their baseline during testing.

Be sure to check out **Signal vs. Noise** for the fully story (**part 1, part 2, part 3**).

First, they drafted a long form version of their landing page and ran it through an A/B split test—presenting either the original or the long form version to over 42,000 visitors. The Long Form page had a 37.5% increase in net signups. Awesome! But they didn't stop there.

Despite the success of the Long Form design over the original, they implemented yet another A/B split test—this time a far shorter Person Page, which had a 47% increase in paid signups over the Long Form design.

Next they added more information to the bottom of the Person Page. The resulting Long Form Person Design did in 22% worse than the original—despite the original user preference Long Form design!

Since the Person Page was the clear winner, they decided to swap out the featured person to see how different faces affected conversion rates. Testing indicated that a specific person wasn't as important as a big photo of a smiling customer. Jamie points out, however, that they are still “tweaking and measuring behind the scenes.” Just because the Person Page is the winner for now, that doesn't mean

they won't eventually come up with a design that's even better.

## The 37Signals Test Implementation

Noah describes their testing implementation as, "two services and some home grown glue." It looks like this:

1. They use **Optimizely** to set up the test.
2. In conjunction with the Optimizely setup, they use a Javascript snippet inserted on all pages (experimental and original) to identify the test and variation to **Clicky**.
3. They also added to Optimizely another piece of Javascript to rewrite all the URLs on the marketing pages to "tag" each visitor that's part of an experiment with the experimental group. When a visitor completes signup, Queenbee— 37Signals' admin and billing system—stores that tag in a database so they can track plan mix, retention, etc. across experimental groups.
4. Finally, they set up click and conversion goals in Optimizely to serve as validation for the results from Clicky.

After the testing begins, their Campfire bot 'tally' takes center stage to help evaluate the test. They've set up tally to respond to a phrase like "tally ab test highrise landing page round 5" with the "conversion funnel" for each variation- what portion of visitors reached the plan selection page, reached the signup form, and completed signup.

Tally also provides the profile of each variation’s “cohort” that has completed signup, including the portion of signups for paying plans, the average price of those plans, and the net monthly value of any visitor to any landing page.

Anyone at 37signals can check on the results of any test that’s going on or recently finished anytime in just a few seconds via Campfire.

This is the anatomy of a great test—one bold change at a time, meticulous documentation, and full understanding of the cyclical nature of optimization.

---

#### Chapter 6 Notes

[1] <http://searchenginewatch.com/article/2284309/Google-Accounts-for-Nearly-25-of-All-U.S.-Internet-Traffic>

[2] <http://blog.kissmetrics.com/landing-page-blueprint/>

[3] <http://blog.kissmetrics.com/c-o-n-v-e-r-t-s>

[4] <http://www.conversion-rate-experts.com/seomoz-case-study/>

[5] <http://37signals.com/svn/posts/2977-behind-the-scenes-highrise-marketing-site-ab-testing-part-1>

# Reducing Bounce and Exit Rates



Your site is up, and your product is out there for the world to see. Before you know it, you have visitors trickling in to see what you have to offer.

Despite the depths of the Internet and the billions of pages offered, users are arriving at your website, and then without any explanation—they're leaving.

They come and then they go, maybe after a minute, maybe even less. After all of the hours you've put in, the majority of your visitors aren't staying around long enough to get past your landing page. Many of them visit once and never return.

Do not immediately move through the five steps of grief; in this chapter we're going to go over some ways to change this trend for the better. Tweet this!

In Chapter 1, we touched briefly on your Bounce and Exit Rates. In this chapter we'll look at these numbers in much

more detail. First, let's review those key terms.

### **Exit Rate**

An Exit Rate is specific to each page; it's the percentage of people who leave after viewing the page. Your exit rate lets you know the last page that users view before they move on. A very high exit rate on a specific page can be a red flag.

For example, if your product tour page that details the benefits of what you sell has one of the highest exit rates, you are likely not connecting the true value of your product with your visitors.

### **Bounce Rate**

Your Bounce Rate is the number of visitors who leave your website after visiting a single page. Each page has its own bounce rate, but initially you probably want to address look at the bounce rates for three pages:

- Landing pages that you're sending paid traffic to through ads
- Pages where you are attempting to make conversions happen
- High traffic pages—pages that most of your visitors see

The higher your bounce rate, the lower your percentage of engaged users. Your bounce rate can be affected by your page, but also by the quality of the traffic coming to your site.

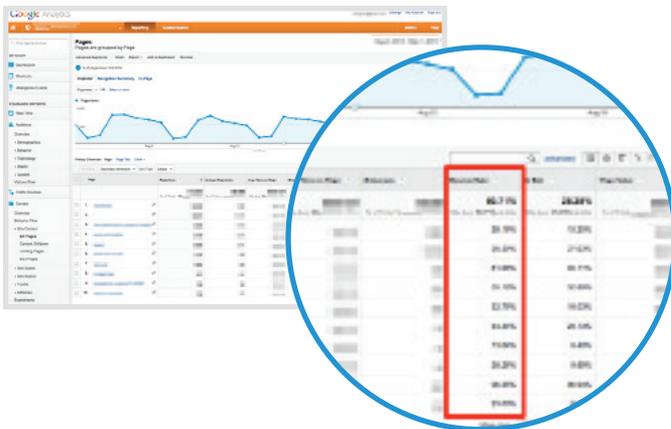
All of the following ways of leaving your site constitute a bounce:

- Hit the back button
- Type a different URL
- Close the window or tab
- Click on an external link
- Timeout [1]

## But how do you find your bounce rate?

This is where your analytics come in. We touched briefly on analytics in Chapters 1 and 4, and we'll discuss them in much more detail in Chapter 9, but for the sake of our discussion of bounce rates, we're going to mention them again. They are that important.

A basic analytics report will give you an overall bounce rate, with options to dig deeper and find out the bounce rates for individual pages. In Google Analytics, you'll find this by going to Content > Site Content > Pages.



Once you have a grasp of what your bounce rate is, it's time to figure out why visitors aren't sticking around in the first place.

Your toolbox for determining what's causing your high bounce rate contains many of same tools we discussed in Chapter 4. Again, we'll discuss these at length in Chapter 9, but the basics are as follows.

**Analytics** – Figure out bounce rate and traffic sources for your most popular pages. Your website's overall bounce rate is too vague a number. A detailed page-level report will help you identify your highest traffic pages and your worst offenders when it comes to bounce rates. Analytics also delivers insights regarding where this traffic is coming from.

**User Testing** – Figure out what users are doing on your site. The ability to observe how users interact with your site is invaluable in determining the cause of high bounce rates. Using a CrazyEgg heatmap might reveal that only 30% of visitors see your call to action.

**User Surveys** – Ask users what they are looking for and whether they can find it. Analytics and testing will only tell you so much. Some stuff you can only figure out by asking visitors directly.

### Here are some of the most common culprits:

- **Your website is visually unappealing.** Sometimes the fix is obvious. A visitor has stumbled across your site,

and they are unimpressed by your cheesy stock images and choice of Comic Sans as a font. Never underestimate the power of an attractive, easy-on-the-eyes website compared to a cluttered eye-sore. Great design creates credibility.

- **Your website is difficult to use.** Maybe your site copy makes perfect sense to you, but visitors are left confused or, even worse, offended. It could also be that users are not visiting more pages because they can't find them. Either because of poor layout, poor information architecture, technical errors, or malfunctioning buttons and page errors, users are left stranded.
- **Your website doesn't meet user expectations.** Unlike in the previous scenario, in which the user can't easily leave the landing page, in this situation someone visits your website based on a promise that isn't kept. If you do offer what they're looking for it might not be easily located from the page they landed on. Users lack the motivation or time to scour every page you have, so it is crucial to remove the obstacles that cause them to give up and look elsewhere.
- **The people coming to your website aren't the right people.** The type of person viewing the page is just as important—if not more so—than the page itself. If people are bouncing it may be because they arrived based on a false promise. This is traffic you can't really optimize, because they are going to bounce regardless. To avoid

this, be sure your ads accurately represent your product and keywords align with your site's mission.

- **There is no Call to Action.** This issue is quite comparable to the “lack of usability/navigation” issue, though likely even more detrimental to your bounce rate. Users arrive to your site one way or another, and simply don't know where to go next—the shopping cart is nowhere to be found, it's not clear how to subscribe to your blog, etc. Whatever the activity you've designated as conversion, if the user has no idea what you want them to do, there is a huge problem.

### **For example...**

You own a sporting goods store that's having an awesome sale on fishing reels. You advertise in the newspaper, put banners on the storefront, and send out a mass email. The turnout is great! A thousand customers show up, but only ten customers are able to locate the reels on your cluttered, disorganized sales floor.

The remainder is left alone at sea, struggling (mind the pun), and more often than not, this struggle is all it takes to make your customer head for your competitor across the street (whose fishing reels are prominently displayed in the front window). This is how e-commerce works, except it's far easier to make a few clicks over to the competitor compared to crossing the street. If you're making it hard for your users to take advantage of what you're offering them, you're essentially sending that competitor business.



## **Now, lets take another look at the above issues:**

### **Your website is unattractive.**

When a user arrives at your website, is he or she greeted with a simple, easy-to-navigate site? Or is the user bogged down with pop-up ads, dated graphics, and a disorganized layout? Your goal is to provide exactly what they are looking for. If any visual element of your site stands in the way of this, you are creating friction, and friction kills conversion.

### **Your website is unusable or lacks navigation.**

The easiest fix here is to actually put yourself in your users' shoes and explore your site.

- Does every link work?
- Do you run into any technical errors?
- How is the load time?
- Can you easily follow your own navigation to your desired goal?

To take it a step further, consider asking a few close friends to try out your site and complete a task. Watch them and document their experience—specifically any problems they have. For the best possible representation, use friends from all over the spectrum, those inside your field and those who have no idea what you do or sell.

### **Your website doesn't meet user expectation.**

First, ask yourself these questions:

- What search terms did visitors use to get here?

- What website or ad did your visitors come from?

If the answers to these questions are readily available, you can make some assumptions about what visitors are looking for and expecting to get from your site. Again, this will come from analytics. To find this out in Google Analytics, you'll use the All Traffic, Referrals, and Search Engines reports under Traffic Sources.

Many users will arrive via search engines, so it is important to know their intent and make sure your site matches those expectations. For example, if you sell marketing automation software but have a large percentage of visitors showing up looking up performance-based marketing agencies, you have a percentage of visitors who will never buy from you, no matter how optimized your landing pages are.

In addition to analytics, you should ask visitors what they're looking for when they arrive on your site. This lets you determine visitor intent, going beyond keywords to the actual reasons a person is on your site.

For example, if you have a mobile photography iOS app and a visitor arrives on your site from searching "iPhone mobile photos" you don't know if they're looking for a photo taking app, photo editing app, how to backup their photos, or how to take better pictures with their phone. You can only get that information by asking.

## There is no Call to Action.

If a user is lost, the best tip is for the site to be a guide. You need to guide the users towards your goal. The users shouldn't have to think too much or look too hard when arriving at your site. Make certain that your Call to Action is prominently placed on your landing page. Also consider these tips to help guide your users to your CTA:

- Situate a "search function" in clear view for users
- Match keywords in ads you run to your CTA, this way the users naturally spot what they expected to find

## Too Many Calls to Action.

With too many distractions comes the potential for the user to get anxious and hit the back button. There are many tools you can use to figure out exactly where your users scroll on the page, which will be covered in Chapter 9. But know for now that the most sure way to guide your user to your CTA is to give them little other choice. There should be a clear path upon the user arriving on the page to fulfilling the goal you set out.

## Back to the fishing store example...

Upon advertising the awesome sale of fishing equipment, you would have every reason to prominently place all of that merchandise, so as soon as customers opened the door to the store they saw what they expected to find. There is no reason for anything else to block this pathway. No other merchandise. No other announcements for later sales

cluttering the customer's view. Nothing between the fishing reels and your customers.

These are of course just some examples. Your bounce rates are contingent on your website's unique challenges and user base. Still, when attempting to lower your bounce keep the above tips in mind. The important thing is this—in order for visitors to convert into users, they have to stick around. In its most basic form, lowering your bounce rate is simply figuring out why people are leaving and fixing it.

---

#### Chapter 7 Notes

[1] <http://blog.kissmetrics.com/bounce-rate/?wide=1>

[2] <http://wingify.com/conversion-blog/why-your-bounce-rate-is-high-and-how-to-fix-it-top-6-reasons/>



# Myths About Conversion Rate Optimization



At various points so far in this guide we've touched on the many Conversion Rate Optimization myths. In this chapter, however, we're going to discuss them in a bit more detail.

**Myth 1: Conversion Rate Optimization is about following “best practices” like changing button color, making my call to action red, and crossing my fingers.**

By this point, you should get that this is NOT what Optimization is about, but we're mentioning it again because this myth is so pervasive. If you have a low conversion rate, you can be sure it's not because your buttons are the wrong color or your call to action is blue instead of red. Making little tweaks like this might result in slightly higher conversions, but they don't remove the true barriers to conversion, such as:

- A lack of trust/confidence in your site

- A lengthy conversion process that seems like too much work
- Your website is just too slow
- Your copy is confusing
- Your call to action—though bright red!—is still obscured by unnecessary images, links, and copy
- Your tags and adwords lead users to believe you offer a product or service you don't in fact offer
- And on and on ...

You get the picture. The barriers to conversion are seemingly endless, and each one has a distinct solution that almost certainly doesn't involve changing button colors. You can't truly ascertain what your site's biggest barriers to conversion are without rolling up your sleeves, running some tests, and putting yourself in your users' shoes.

## **Myth 2: Conversion Rate Optimization is about guessing what my users want.**

Variations of this myth include:

- I know my users so well, surveys aren't necessary.
- Testing isn't necessary because I know my site is better than what's out there.

Anyone who tells you that you optimization is all about guesswork and gut feelings is probably operating under the illusion of this myth. As we've discussed again and again in this guide, a strategic approach is essential to any optimization plan.

While hunches can be important steps in the formation of hypotheses, you have no way of knowing whether those hypotheses are correct unless you have some way to gauge two things: the importance of the page or element to the user in their decision-making, and the user response to the change.

Analytics are an important piece to this puzzle, but we also can't overstate the importance of user surveys and testing.

### **Myth 3: Long copy doesn't sell.**

Variations of this myth include:

- Users don't read.
- Users don't scroll.

We briefly discussed this as it applies to landing pages in Chapter 6, but this myth is cited in reference to any optimization efforts you might be undertaking. Keep in mind, however, the users who are genuinely interested in whatever you're offering are likely to want more information. They will read, and they will scroll...

But it's your job to meet them halfway. Make your copy as clear, succinct, and engaging as you can—without cutting essential information. Make your page as uncluttered and easy to navigate as possible.

For example, if you're cutting, splicing, and jamming together five pages worth of copy because you read somewhere that

you have to keep everything “above the fold,” your user is going to be infinitely more frustrated than if he or she simply had to do a little scrolling.

### **Myth 4: If I replicate a successful company's website (wording, layout, color scheme), my conversion rate will go up.**

Variations of this myth include:

- Conversion rate optimization is simply a matter of making my website “cleaner” and “more modern.”

This myth is similar to #2 in that it relies on something other than actual data to dictate an optimization plan, which—you guessed it—is the real problem here. Maybe you'll see an increase in conversions if you copy a successful website, maybe you won't. If you do, it's likely because in doing so you inadvertently removed a barrier to conversion of which you were unaware.

Not only that, but ripping off someone's design is beyond lame. These changes are merely cosmetic. They don't begin to address the other, deeper issues that might be hurting your conversion rate—like inappropriate keywords, user concern regarding your site's security, and so on.

The only way you'll uncover and remove these obstacles is to stop guessing and take a hard look at your site's stats via analytics, user survey, and user testing.

## **Myth 5: Conversion is the only metric that matters. All my efforts should be focused on getting as many visitors as possible to convert.**

Yes, optimizing conversion is important—after all, that’s what this whole guide is about. But it’s also important to understand that for many visitors conversion is a process. You can show them how conversion will benefit them and remove the barriers standing in their way, but ultimately they have to take that final leap.

Your goal is not to manipulate users into converting whether your product or service is right for them or not. **You want to convert engaged users who will love what you have to offer and help your business to grow by telling their friends all about you.**

This means you should pay attention to other meaningful metrics in addition to your conversion rate. For example, your Visitor Recency (how long between visits) and Visitor Loyalty (how frequently people visit) can give you some ideas about how engaged your users are, as well as help you figure out how to better foster this engagement. [1] You can find frequency and recency reports in Google Analytics under Audience > Behavior > Frequency & Recency.

Surveys also come in handy here. If your customer satisfaction metrics and Net Promoter Score are low, you can dig into those responses to see if the user’s expectations are misaligned with your offer. If you find that you have the

wrong people buying your product, you'll want to reevaluate the traffic sources and ads that are sending visitors to your site.

This list is by no means exhaustive, and as CRO gains traction you can be sure these myths and more like them will continue to circulate. However, the one thing to keep in mind is this: any tip, trick, or hack that promises quick gains without taking into consideration your unique circumstances, mission, and metrics is probably too good to be true. Remember, real optimization requires you to roll up your sleeves and figure out what's right for your site.

---

#### Chapter 8 Notes

[1] <http://www.incomediary.com/8-myths-that-are-hurting-your-conversion-optimization-efforts>

# Tools to Test and Optimize Conversion



Think of this chapter as both a manual and a catalog. If you're looking for a basic explanation of which tool does what and how, you'll find that here. If you want recommendations, you'll find those as well.

To say there is a tool for every job is an understatement. You will run into more tools than you could possibly use. After reading this chapter, however, you should feel equipped to wade through all the options and select the right tools for your job.

If you've skipped right to this chapter without reading the preceding eight you may be in grave danger of making the classic CRO testing mistakes of implementing tools and tactics without a plan. If that's you, take your hand out of the toolbox cookie jar and return to chapter one. You'll be back here before you know it and better prepared to leverage the resources in this chapter.

Think back to our basic toolbox from Chapters 4 and 7. In

it, tools are divided into three main types—analytics, user surveys, and user testing. Think of those categories as drawers in your toolbox. These drawers might contain any number of tools, depending on your needs and budget.

If you're a hobbyist building birdhouses, you might only have a tool or two in each drawer. If you're a professional carpenter with a twenty-person staff, you'll probably have several. Still, the likelihood of the hobbyist and the professional having some tools in common is pretty high.

Now about those drawers...

## **Analytics**

The most basic and essential tool you can have, analytics software tracks and reports on what's happening on your site day in and day out. You want an analytics package such as Google Analytics, KISSMetrics, Mixpanel or similar that allows you to get at the basics (like unique visitors and bounce rate), but also has advanced analysis tools like audience segmentation, cohort analysis, and conversion tracking.

Segmentation can produce data for different sets of people, and you can isolate hiccups or trouble spots in your conversion funnel. Cohort analysis allows you to group a set of users together by a common attribute to see how group behavior differs as the common attribute changes.

A simple cohort analysis example is examining how many users downloaded your app in a given month. You can

compare users who downloaded in August to those who downloaded in September to see which group is the most engaged or most profitable. You can use that information to learn how product changes impact behavior.

- Google Analytics (free)
- KISSMetrics
- Mixpanel
- Segment.io
- Chartbeat
- Clicky
- RJ Metrics
- Woopra
- Chart.io
- Custora
- Sumall
- GoodData
- Omniture

There are more, and depending on your business size, type and traffic you'll need to determine which is best for you. For most companies Google Analytics is plenty. If you want to do cohort analysis, using a combination of Google Analytics and KissMetrics will do the trick.

### **User Surveys**

But analytics can only communicate so much about your users' needs; you need something that gives you the ability to gain insights directly from users in the moment, to hear their concerns in their own words; there is no such thing as too

much user feedback. This is where user surveys come in.

### **For example...**

You've used analytics to figure out that a large percentage of your visitors are dropping out at a certain point in your conversion funnel, but you've gone through the funnel yourself several times and can't seem to figure out what the problem is. Implement an in line user survey at this exact sticking point.

In the most basic application of user surveying, all you really need is one good, open-ended question that allows users to express their concerns. If you'd like, acquire an email address for feedback purposes—but be sure to keep your word and actually follow up.

In more advanced iterations, user surveys can facilitate an A/B split test—run page-level surveys on both the original and the test page, and see how visitors' answers differ.

### **Here are some basic means of conducting surveys, along with a little bit about each one...**

- Qualaroo offers unobtrusive in line surveys that allow you to ask questions on specific pages or at specific points in your funnel.
- Survey Monkey is an online survey tool, which helps create surveys, customer feedback and market research

via email and social media.

- SurveyGizmo is a software company focusing on creating online surveys, questionnaires, and forms for capturing and analyzing data.
- PollDaddy is a user-friendly polling software that can be used to get user feedback via email or social media.
- Survey.io is a fixed survey designed for startups to determine if their product is delivering an irreplaceable must-have experience.

## User Testing

But what if users can't articulate the problem they're having? Luckily, there are plenty of user testing software options. These tools allow you to directly observe how users are interacting with your site. You can use their feedback to get a better understanding of your site's functionality, as well as test potential changes and document how they'll play out in real life.

Brace yourself, however, because the User Testing drawer is the most cluttered of them all. In the interest of keeping things organized, we've added some additional dividers to one.

To figure out what's grabbing your users' attention—where they're looking, clicking, and lingering—use one of the following tools, which perform Heat Mapping and track Click

Density. Much like user survey, these tools help you to make sense of how users engage with your site so you can form hypotheses about how to improve this experience.

- CrazyEgg is an eye tracking technology that allows you to visualize where users are scrolling on your site through the creation of heatmaps, scrollmaps, overlay tools and confetti tools.
- Click Tale is a tool that creates videos of user interactions with your site so that you can see how they use the user interface elements of your site. The tool also analyzes heatmaps, scrollmaps, among others, while also creating videos of user interaction.

Next, we have Concept Testing Tools. Once you've formed your hypotheses, these tools allow you to quickly and painlessly draft a test version of your site (also called a wireframe) and get feedback regarding potential trouble spots.

- Balsamiq is a wireframing and mockup tool that allows you to create low-fidelity sketch wireframes and prepare hypothesis for testing.
- Cacao is a user-friendly drawing tool that allows you to create a variety of diagrams such as site map, flowchart, mind map, wireframe, UML diagram and network diagram.

- Browsershots is a free, open-source web application that makes screenshots of your web design in different operating systems and browsers. You submit your web address, and a number of distributed computers open your website in their browsers. Then they will make screenshots and upload them for your review.

There are A/B Split Testing and Multivariate Testing Tools. These are invaluable when it comes to trying out and comparing various iterations of your web page.

- Optimizely is a website optimization platform focused on A/B and multivariate testing and making them easier to use and understand on your site.
- Google Content Experiments is integrated with Google Analytics, and is Google's free website testing and optimization tool.
- Visual Web Optimiser also focuses on an easier approach to A/B and multivariate testing, but includes behavioral targeting, heatmaps, usability testing, as well.
- Unbounce also offers A/B testing, while focusing predominantly on the efficacy of your landing page.

Finally, there are User Testing tools. These allow you to get user feedback from users like yours for your existing site, new product features, or new site designs. These are great for getting detailed qualitative feedback about how easy your

site is to use for first time visitors.

- UserTesting.com lets you find users like yours and give them a series of tasks to perform or questions to answer by using your site. Their session is recorded so you can watch their screen. The users also narrate their thinking, so you can get detailed feedback about their thought process while using your site.
- VerifyApp.com makes it easy to get feedback on screen shots or designs in terms of which design an audience likes better, is more memorable, or more trustworthy.

Try not to feel overwhelmed by the sheer volume of tools available. In the real world, we acquire tools over time and as we need them. It might help to consider stocking your optimization toolbox this way as well.

For example, if you're still in your data-gathering phase, focus initially on implementing a great analytics package. Once you're comfortable with that, examine your needs and select a user survey service that meets them. After you've implemented user surveys, begin researching testing options.

# Measuring Conversion Rate Efforts and Calling Winners



By this point you may have started implementing many of the tools we discussed in the last chapter, and you're working to optimize your landing pages and lower your bounce and exit rates. You might even be the king or queen of CRO jargon among your friends—using phrases like “conversion flow” and “user experience” around the water cooler.

You've got your most recent analytics reports, and you've designed some simple A/B tests. But how do you know which tests are improvements and which ones aren't moving the needle? And more importantly, what will you do once you've called the winners and optimized your first set of tests?

## **Before you dive in to the data, keep the following in mind:**

- It's crucial you stay goal-focused. A lot of information is going to be available, so don't get overwhelmed or bogged down and lose sight of what you're trying to improve.

- Test everything—just not all at once. You might feel tempted to do a complete overhaul of your site if the first test ends unfavorably, but this will not result in actionable data. Test one specific change at a time so you'll know what's working and what isn't.
- As we mentioned in Chapter 4, keep records of everything. Write down what you changed, why you changed it, and what you expect to find. Take screenshots of all variations. You will need this data later.

### **So how do you know which optimization efforts are successful? Which version of your page or funnel is better?**

Just like with all your efforts leading up to this point, data is key. Just because a test version of your site is prettier or cleaner doesn't mean it's the obvious winner. This is where the baseline we talked about in Chapter 4 comes in. This baseline is your site's pre-optimization "average." It consists of your typical conversion rate, average bounce rates for top landing pages, how much time the average visitor spends on your site, and any other metric you think indicates engagement (which, as we've discussed repeatedly, typically leads to conversion).

### **So how do you know when a test is over?**

We warned you in back Chapter 4 of the dangers of calling a test too early. Bear with us here, we're going to discuss this stuff in a bit more detail.

In order for you to have confidence that you've in fact found a winner, your results need to be statistically significant. This means the margin of error, or likelihood that your results are merely chance, is low. In general, the larger the sample size, the smaller the margin of error.

If statistical significance, or significance level, is less than 5% probability, this means that your result is at least 95% likely to be accurate (or that it would be produced by chance no more than 5% of the time). Your testing software might use the terminology "95% chance of beating original" or "95% probability of statistical significance."

### **But, as Evan Miller points out in his article "How Not To Run An A/B Test":**

[your testing software's] significance calculation makes a critical assumption that you have probably violated without even realizing it: that the sample size was fixed in advance. If instead of deciding ahead of time, "this experiment will collect exactly 1,000 observations," you say, "we'll run it until we see a significant difference," all the reported significance levels become meaningless. [1]

Yikes. In order to avoid what Miller refers to as repeated significance testing error, it's critical to set a sample size and stick to it. Luckily, most testing software—like Optimizely, Visual Website Optimizer, and Google Content Experiments—includes this. For example, Optimizely recommends at least 100 people see both variants of an A/B test before results

begin to become significant. If your software lacks this function, consider using Miller's free Sample Size Calculator.

Something else to keep in mind is that tests may swing wildly over time. Just because one version of the test starts off strong, that doesn't mean you can prematurely end the test. Stick to your predetermined sample size, and know that statistical fluctuations that will even out over the duration of the test.

For example, you can flip a coin 5 times, and even though the odds of it landing on heads or tails is 50%, it's not unlikely to get 5 heads in a row. However, over 100 flips or 1,000 flips the averages quickly even out to 50/50.

For this reason, one sampling of 1,000 users is infinitely more valuable than several samplings of 10 – 15 users each. The winning version of a site is the one with consistently better metrics—it's as simple as that. Remember, the metrics you're looking at here are, of course, conversion rates, but also whatever other metrics you've determined affect conversion (engagement metrics in particular).

Big, clear cut wins are always great. But that's not always how tests turn out. For example, a change that lowers bounce rates for the test site but doesn't improve (though doesn't worsen) conversion rates could still be considered a "winner"—an improvement worth keeping, because, after all, your goal is to improve your site piece by piece, one test at a time.

## If your hypothesis was correct and your test was a clear winner...

1. **Consider whether you can make further improvements.** While there's no such thing as perfect, there is almost always better.
2. **Think about how you could apply this change elsewhere.** For example, if taking the jargon out of your landing page copy increases conversion rates, test to see if simplifying the language throughout your site further boosts your conversion rate.
3. Once you've thoroughly addressed 1 and 2, **begin addressing the next item on your list of optimization concerns** (the one you were instructed to make in Chapter 4).

## But what if your hypothesis wasn't correct, and your test is a loser? Now what?

1. This means you were originally doing a better job of something—try and figure out what that is.
2. Review your analytics and user survey data with this in mind to see if you can gain new insights. Conduct new surveys if need be.
3. Form a new hypothesis.
4. Design and conduct a new test.
5. Repeat.

Remember, you can learn just as much—or more—from a failed test as you can from a successful one, as long as you understand that the resulting data is an opportunity.

As we've mentioned nearly every chapter—optimization is not a one-and-done approach. There is no ultimate optimization goal, no perfect version of your website. Once you've declared a winner you should do one of two things: either you ask yourself how you can further optimize this particular element of your site, or ask yourself what else about your site can now be optimized. The best optimization efforts are cyclical and continuous.

---

Chapter 10 Notes

[1] <http://www.evanmiller.org/how-not-to-run-an-ab-test.html>

# Bonus: Advanced Tips and Hacks for CRO



Here is a composite list of additional hacks and tips that we have collected to keep you on top of the game. As always—your approach should be tailored to your specific site. Try out what seems like a good fit for your needs and user base, then analyze, test, and repeat.

Warning, if you've jumped right to this chapter you may be led wildly astray. Go back and start at the beginning. It will be worth it, and could save you from making some costly mistakes in the name of “hacking”.

## 1. Site Speed

The efficacy of this simple hack cannot be ignored. As the Tag Man blog reports, a mere 1 second delay in page-load results in a 7% decrease in conversions.[1] Ouch. Pay attention to your site speed to ensure your optimization efforts aren't in vain. [2]

## 2. Always Be Closing

Think of your site as your indefatigable salesperson. Any salesperson worth their salt always markets their most appealing attributes. Double check your site and make sure you're clearly communicating your true value.

Here are a few routes to consider:

- **Social proof.** Testimonials can give users a feeling of security. If you've been positively reviewed by users, consider showcasing a few on your site. If you don't have reviews, you can ask for them—especially if you have highly satisfied, big name clients—or invite users to submit them.
- **Appeals to authority.** Can you tie yourself to a trend, belief, or position that's advocated by someone of stature in your community or profession? By aligning yourself with shared beliefs, you can reduce the amount of second-guessing done by visitors.
- **Third party validation.** A variant of social proof, but instead of testimonials you use the logos of trusted brands to appropriate some of their brand equity for your brand. "As featured in The New York Times" or showing prominent client logos are examples of this.
- **Build a community.** Give users a way to participate through comments, reviews and feedback, etc. It will strengthen your current user base by fostering a sense of

belonging, in addition to foster growth among others who want to participate as well.

- **Referrals.** Never underestimate the power of word-of-mouth and friend referrals. Leveraging word of mouth is a guide in and of itself, but consider how you can incentivize sharing through incentives like discounts or free gifts to users who recruit others through email, social media, etc.

These are just a few free and inexpensive ways of connecting your site to more users.[3]

### 3. Raise Your Average Order Value (AOV)

Here are a few methods of increasing your AOV. You can improve your revenue even without improving your conversion rate.

**Bundling.** Combine numerous complementary products, giving the user a discount for purchasing them together. This often persuades them to purchase more than they originally would have.

**Promotions.** Promotions come in an array of shapes and forms— for example, free shipping on orders over \$50 as a way to drive customers to spend more. Amazon’s “Free Super Saver Shipping” influences customers to not only spend over fifty dollars in a single purchase, but also to buy exclusively from Amazon dealers, as individual sellers are excluded from the promotion. Reminders that the customer is only “X” dollars away from free shipping may increase sales.

**Cause-based incentives.** Tom's Shoes, which gives a pair of shoes or glasses to a disadvantaged child with every purchase, probably comes to mind. But they aren't the only ones who've successfully used this strategy to raise AOV (why buy one pair of shoes when you can buy two and do twice as much good?) Sometimes a donation to a charity is enough to persuade customers who are on the fence.

**Rewards.** Loyalty programs can keep users returning. In particular, programs that reward higher levels of spending (escalating coupons are an example of this) can positively impact AOV, as well as purchase frequency.

**Gamification.** Gamification is a way to incent users to take actions beneficial to your business. Gamification can include leaderboards, chances to win, badges for completing tasks, and collections of accomplishments. It can be leveraged for AOV too. For example, McDonald's annual Monopoly promotion only applies to customers who purchase a larger, more expensive combo item.[4]

## 4. How Friendly Are You?

**Mobile friendly?** There is a good chance that some of your users will be arriving via their phones and tablets, and almost nothing is more difficult to navigate than a site that's not mobile friendly. If a user cannot navigate your site, they can't become customers.

**Browser friendly?** Not all browsers are built the same—that goes without saying, but do you know what browsers are

most popular among your users? There is a chance that your site is awesome on Chrome, but a mess on Internet Explorer. Do the research. Load up the browsers and make sure a user's arrival is always solid. Fixing any browser specific issues could result in rise in conversions.

**Privacy friendly?** It is good to show users their information is secure: signals, like SSL (<https://>) lock images, trusted badges, and social proof can all allay fears. Make sure you have a complete privacy policy linked from the footer of every page on your site.

**Language friendly?** There are 50 million Spanish-language Internet users in the United States alone. That's more than the total Internet-using population of the UK. If you're ignoring language support, you could be leaving a lot of money on the table.

**User friendly?** No user will ever complain that your site is too easy to use, fast or clear. A mistake free site is a credible site.

**Click friendly?** How many clicks does it take for a user to get to your must have experience? Have you ever counted? Think less. Think the clearest and easiest path to revenue.

**Time friendly?** Information on your landing page should be prioritized by importance. You typically have five seconds to convince a visitor to stick around. Make the most of that brief moment in time. How good is your hook, and how well do

you deliver on the promise?

**Video friendly?** A video on your landing page has the chance to drive conversions. Consider YouTube, or other services as long as users do not have to download additional plugins. Videos can elicit an emotional response that connects with users and drives conversion.

**Rating & review friendly?** If your site has a rating system for product feedback, it is best not to be totalitarian. Erasing all negative feedback will only have users questioning your credibility. If you allow reviews on your site, make sure the quality is high. Zappos found that correcting spelling errors in product reviews increased conversion. Details matter! [5, 6]

---

#### Chapter 11 Notes

[1, 2] <http://blog.tagman.com/2012/03/just-one-second-delay-in-page-load-can-cause-7-loss-in-customer-conversions/>

[3] <http://seogadget.com/conversion-rate-optimisation/>

[4] <http://blog.kissmetrics.com/boost-average-order-value/>

[5] <http://zerogravitymarketing.com/conversion-rate-optimization-tips/>

[6] <http://uxdesign.smashingmagazine.com/2009/05/15/optimizing-conversion-rates-its-all-about-usability/>

# Conclusion



## Now that you're a CRO pro, what's next?

If organizational support was a challenge, you now have the tools you need to argue your case.

You now know how to build a CRO plan the right way, and you have the tools you need to run the tests that will put you on the right track.

While it may seem like an overstatement at this point, we're going to say it one more time—optimization is strategic and cyclical. Despite the fact that you're officially no longer a beginner, there is always room for improvement. Your tested winners may not always be winners, so don't get comfortable. Stay on top of the game.

## A couple of things to remember as you embark on your optimization journey:

- You're never "done" testing
- Guesses and hunches are great starting places, but...
- Data rules—don't let opinions get in the way of facts

- Spending more on advertising without removing the barriers in your conversion funnel first is—literally—pouring money down the drain
- The spray and pray philosophy is not a plan or a legitimate strategy
- Test everything—just not all at once
- And if you find yourself with any questions, you can always return to your friendly neighborhood CRO guide.

Good luck. Before you leave, be sure to pay it forward.

**Share this guide with your friends and colleagues.**

---

Chapter 12 Notes

[1] <http://moz.com/blog/thedefinitivehowtoforconversionrateoptimization>





The Beginner's Guide to Conversion Rate Optimization (CRO) is an in-depth tutorial designed to help you convert more passive website visitors into active users that engage with your content or purchase your products.

This guide will walk you through the basics of CRO—from why it matters in the first place to how you can go about building your own testing and optimization plan. You'll find information that will help you improve the performance of your website, including: optimizing your landing pages and user experience, as well as the tools you'll need to be successful.