

EBOOK

Conversion Best Practices Toolkit

Grow your business by improving conversion rates at every step of the customer journey

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Intro

You're already one step closer to delivering meaningful digital experiences and turning prospects into customers - and customers into brand ambassadors. At a time when customers demand more from their digital interactions with companies across a growing number of communication channels, customer acquisition and retention can be a big challenge. In this toolkit, you'll find a variety of resources to help you identify conversion optimization opportunities throughout the customer journey.

1. First, get in the right mindset with our [How to Optimize for Growth](#) introduction. Optimizing your website -- copy, design and landing pages -- is a key first step for improving digital experiences. But by experimenting across every single customer touchpoint throughout the funnel, you can create far more lifetime value.
2. With that in mind, start by exploring the [Landing Page Optimization Plan](#) to discover how experimentation enables you to make a memorable first impression with your landing page. Use these best practices and suggestions to start delivering content and imagery that drives conversions.
3. Use the [Copywriting for Conversion Checklist](#) to assess your current content and identify areas for improvement. Start creating headlines, value propositions, and content that converts site visitors into loyal customers.
4. Strong content is only part of the acquisition equation. You need to focus on the entire User Experience (UX), which encompasses all aspects of your customers' interactions with your company and its products or services.¹ Check out the [10 UX Design Tips that Drive Conversion](#) checklist to ensure you're putting your customers at the center of your website and landing page design efforts.
5. Each stage of the customer journey is a chance to distinguish yourself from the competition and delight customers. In the [Optimizing Throughout the Customer Journey](#) section, you'll find optimization ideas that can help you attract, acquire, and retain new customers at every step of the customer journey.



Get ready to jumpstart the optimization of your acquisition channels and unlock growth opportunities.

If you are looking for more ideas to improve your acquisition efforts, make sure to follow the [Optimizely Blog](#), and join the [Optiverse community](#) to connect with your peers.

How to Optimize for Growth



1 Test across the entire customer journey.

We've analyzed over 100,000 experiments worldwide. And the results clearly show that the more you test, the more you win. But bear in mind that short-term wins aren't enough. One common mistake is placing too much focus on the cheapest conversions without considering customer lifetime value.

Sure, there are plenty of ways you can boost conversions in the short-term. A 30-day free trial with no credit card required. 50% off for the first 6 months. But will these gimmicks attract valuable customers for the long-term?

Conversion rate optimization (CRO) plays a key role here. A properly implemented CRO strategy goes way further than A/B testing landing pages, CTAs, and imagery. It's about gaining a true understanding of your customers, then applying that insight to create better experiences across all channels. Rather than boosting revenues in the short-term, CRO shapes every aspect of the customer journey.

That's when you move from optimizing a key metric to optimizing the customer experience.

In other words, shift your sights from the data to the kinds of amazing experiences that lead to repeat customers and on-going product usage.



The more that you invest in the average lifetime value of a customer (whether that means a true lifetime's interaction with your brand, or a defined period of say 60 or 90 days post-purchase), the more you'll notice a nice trickle-down effect of positive reinforcements like higher satisfaction ratings or word of mouth referrals.

And you're not having to spend money on acquiring customers who will buy one product from you never to be seen again.



2 Test messaging.

Testing your messaging allows you to engage more customers in the right way and nudge more of them into action. For example, which is more effective - positive or negative messaging? What is more likely to make a shopper add to basket? A direct product pitch or the background story? What kind of nudges (emails, calls to action etc.) move most customers along the funnel? Do you lead with features or benefits? Discounts or free gifts? Is text clear and concise? Are instructions easy to follow? By constantly testing you're constantly learning what works and what doesn't to optimize every message.



3 Reduce friction.

Make it as easy to do business as possible by eliminating difficulties at every stage of the process. Slow loading experiences, long forms, poorly ordered search results, and confusing UX patterns all increase friction. By testing backend or algorithmic processes in addition to front end changes, you can eliminate confusion, significantly reduce friction, and create a smoother customer experience.



4 Personalize and recommend.

Combine testing with AI and you can offer the personalized experiences and recommendations that increase upsell, cross sell and, ultimately, revenue. Personalization is all about understanding the various traits and behaviors of the most important segments of your audience. What are their likes and dislikes? How do they behave? What do they expect from using your product or service? How do their various journeys differ? These insights serve to shape the personalized experiences that different groups now expect as a matter of course.



5 Reduce risk. Increase velocity.

Let's face it, most experiments don't win. You'll still learn a valuable lesson, but your metrics won't move. By running more tests, you'll generate more wins thanks to the law of large numbers. So if you commit enough resources to testing and optimizing your workflow--from designing to launching and evaluating experiments--success will follow success and you accelerate growth.

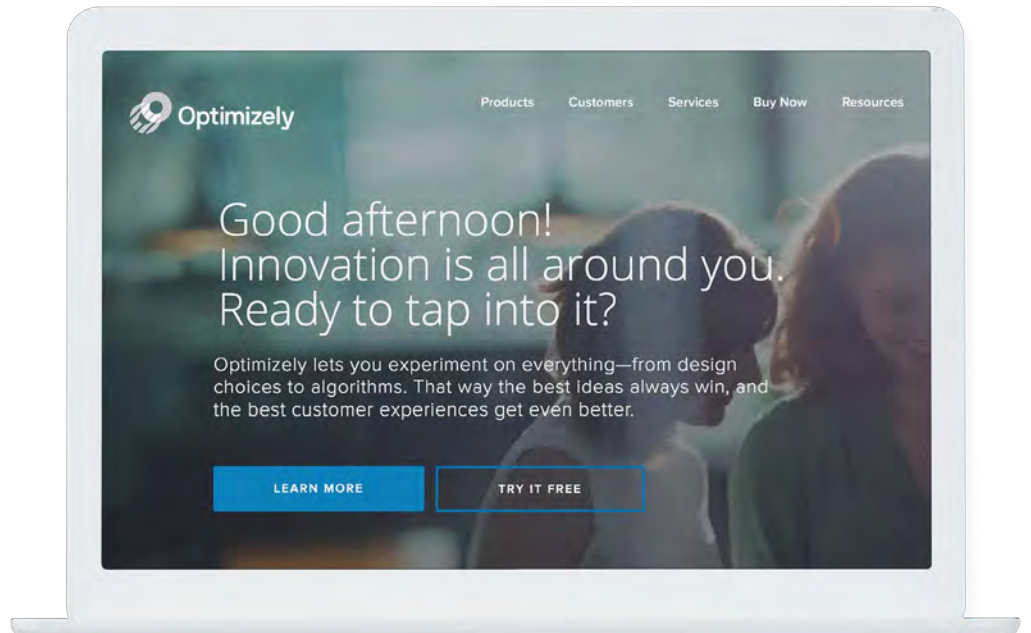
Even better, experimentation not only allows you to grow but also minimizes the risk involved. This is where things like [Feature Flagging](#) come into their own.

After all, new feature releases can be risky. They may not work. They may have an adverse effect on another feature you hadn't thought of. Feature Flags change that by allowing you to gradually turn on a change to a small part of your audience. If it works, great. You can go ahead and turn it on for everyone. But if it goes wrong, Feature Flags also let you turn off the new feature literally at the flick (or a click) of a switch. That's because you don't have to deploy code, so you can forget about headaches like hot fixes and code rollback.

The following chapters will now take you through all this in more detail.

02

Landing Page Optimization Plan



Don't overlook the landing page:

↓ Landing page optimization plan

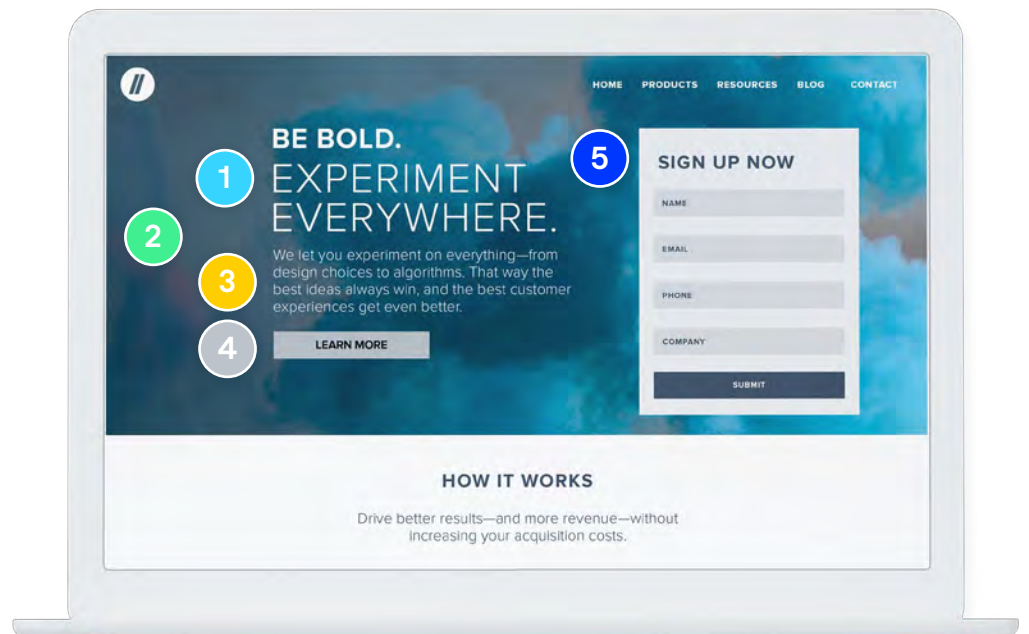
Landing pages play an integral role in the customer acquisition process.

For many online visitors, your landing page is the first interaction they'll have with your business and brand -and missed opportunities for optimization can keep you from turning these visitors into customers.

Let's break down some best practices for driving conversions through landing page optimization.

Focus on optimizing these five elements:

- 1 Headlines
- 2 Images
- 3 Body copy
- 4 Calls to action (CTAs)
- 5 Lead generation forms



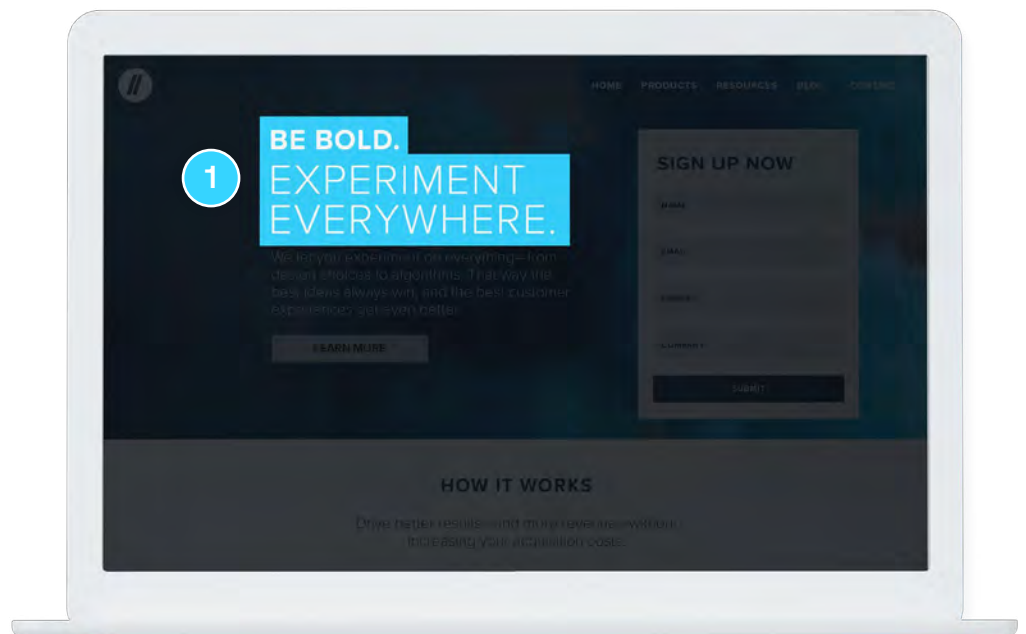
1 Headlines

Optimization opportunities for headlines:

- See how more specific headline language impacts your landing page conversion rates. For example: ‘prints 23% faster than any other brand’, instead of: ‘the fastest printer’.
- Test your tone to see what drives more conversions.
- Try emphasizing gain-framed messaging vs. loss-framed messaging (focus on benefits vs. risks). For example: would you rather have a 10% chance of mortality, or a 90% chance of survival?
- The purpose of the headline is to get your viewer to read the first sentence. Give them a compelling but accurate reason to read on.

Headline optimization checklist:

- Make your headline **clear and consistent**.
- Ensure it **promotes** your value proposition.
- Make it **easy to understand**; avoid jargon or little-used words.



“On average, five times as many people read the headlines as the body copy.”²

David Ogilvy



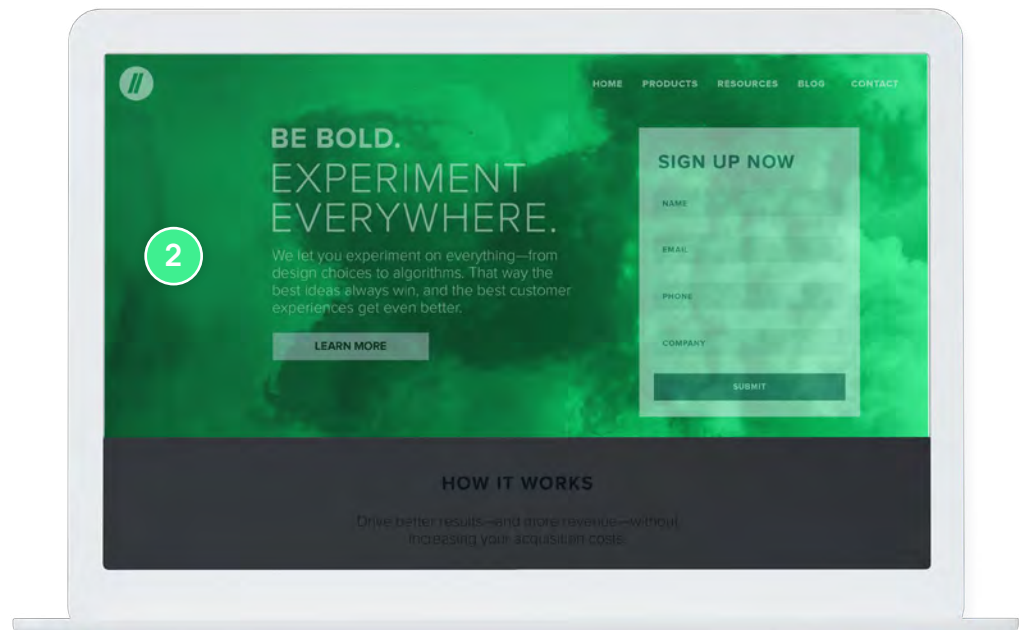
2 Images

Optimization opportunities for images:

- Experiment with different **hero images** at the top of your landing page.
- Try adding personal touches to hero images with a value proposition or call to action (CTA).
- Generally speaking, photos of people perform better than photos of objects. Especially when the person on the photo looks directly at the viewer or to a call to action on the page. Don't use stock photography, though - people today are conditioned to ignore anything that looks like an advertisement.
- Experiment with different types of images: photography versus illustrations, for example, or even video, gifs or cinemagraphs versus still images.

Image optimization checklist:

- Ensure your imagery is **compelling**.
- Make imagery **relevant** to your target audience.
- Brand landing page imagery symmetrically with the ad that led visitors there.



People who hear information are only likely to recall 10% of it three days later; pairing a relevant image with that information bumps retention to 65%.³



3 Body copy

Optimization opportunities for body copy:

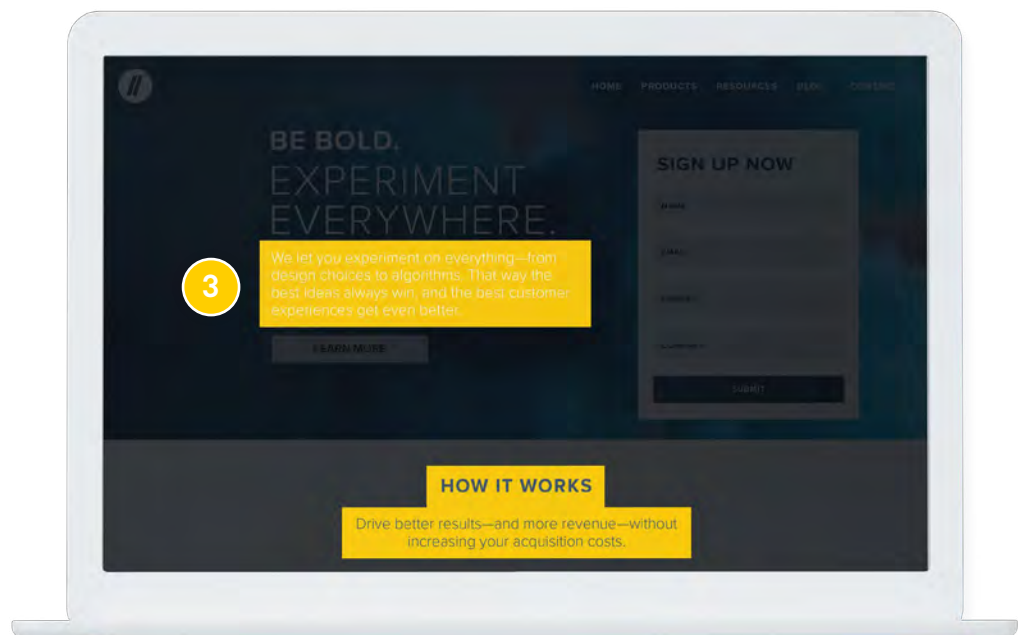
- Experiment with using section titles to break up longer landing pages.
- Try different lengths of copy, usually correlated to the complexity of your product/service. More complex products will typically require more explanation.
- Try presenting a summary list of offerings above the fold, or testing collapsing detail by default in fields below the fold.

Body copy optimization checklist:

- Match landing page language with the language used in the corresponding campaign.
- Use compelling language to communicate the value of what is being offered.



Using a combination of data and targeting conditions to create audience segments can help you customize landing page content and deliver personalized experiences.^{4,5}



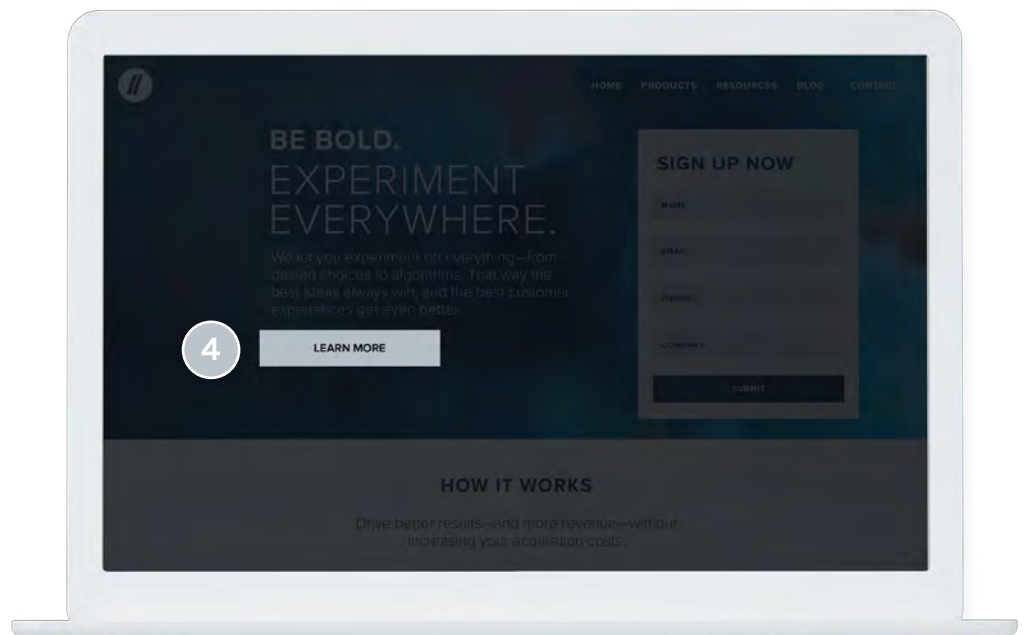
4 Calls to action (CTAs)

Optimization opportunities for CTAs:

- Experiment with different designs to make the CTA button pop; contrasting colors work well.
- Add your value prop into the CTA messaging.
- Add an element of urgency or scarcity in your CTA: 'Order now - only 3 seats left' or using a countdown like 'Offer expires in 11 hours, 23 minutes and 16 seconds'.
- Try making the CTA button as close to the form field as possible.

CTA optimization checklist:

- Feature your CTA prominently on your landing page.
- Repeat it throughout the page.
- Test 'sticky' CTA buttons that remain in sight even when scrolling.



No single button color is better than another. Ultimately, what matters is how much a button color contrasts with the area around it.⁶



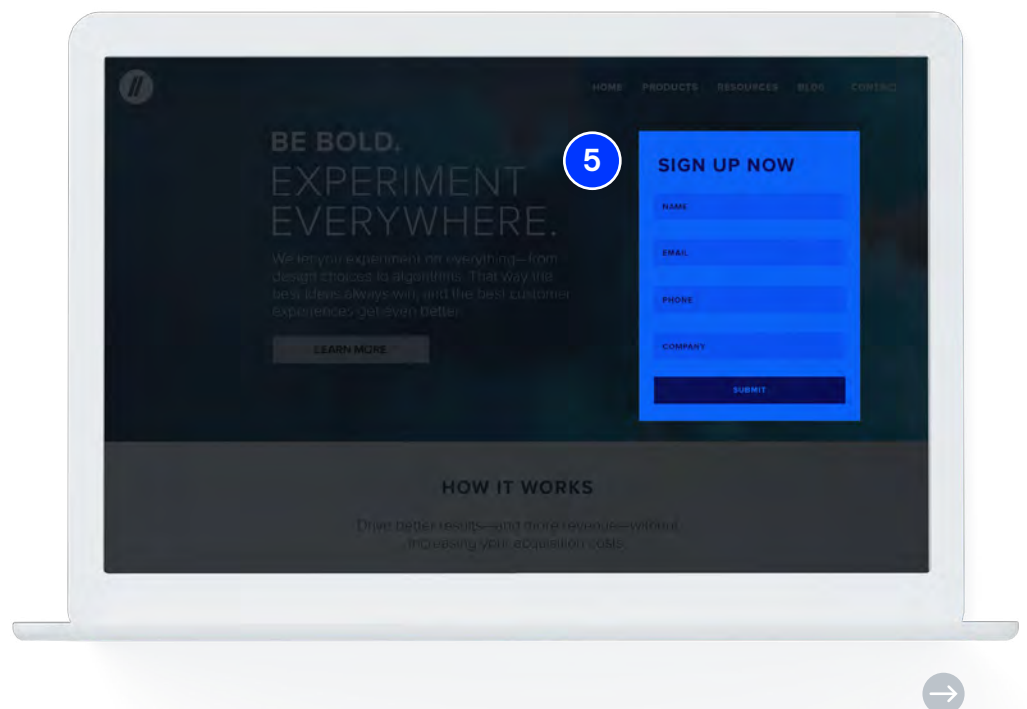
5 Lead generation forms

Optimization opportunities for forms:

- Experiment with different formats; consider adding imagery (especially imagery of people).
- Keep it short and simple. Fewer questions generally result in higher conversion rates.
- Try using autocomplete options and different labels for each form field. Some data enrichment services and marketing automation systems allow you to prefill the form with (some of) the user's data.
- Test different copy on the form submission buttons. You can do better than simply 'Submit'. For example: 'Buy now', 'Download now' or even 'Send me my ebook'.

Form optimization checklist:

- Place your form above the fold (near the top of the page).
- Make it compact and easy to read.
- Lead with copy that conveys the value of signing up/completing the form.



Stick to the “1-1-1 Rule” to provide a consistent experience: one value proposition, one clear message, and one CTA per landing page.

Helpful features for landing page optimization

As with all suggestions in this ebook, there is no black and white in landing page optimization, no right and wrong. The only way to be sure something works, is to experiment! Forming, then testing strong hypotheses will help you optimize your landing pages, enhance user experiences, and drive conversions. Maximize the effectiveness of your landing page tests with these helpful Optimizely features:

- **REDIRECT TESTS**: If you already have two or more landing pages built, and want to compare them, the redirect feature allows you to easily test separate URLs against one another.⁷
- **URL TARGETING**: Set parameters and specify the pages where your experiment or campaign will run. Optimizely's exact match feature allows you to run an experiment only when users load an exact URL.⁸
- **AUDIENCE CONDITIONS**: Customize who will be included in your experiments by device, location, user segment and other specific query parameters. Then run more targeted tests to see which iterations resonate with each of your audience segments.⁹
- **MULTI-ARMED BANDITS**: A multi-armed bandit test is a 'smarter' version of A/B testing. It uses machine learning algorithms to dynamically allocate traffic to variations that are performing well, while allocating less traffic to variations that are underperforming. This can produce faster results since there is no need to wait for a single winning variation.



Even small changes can have a huge impact on leads, subscriptions, and sign-ups. Continue reading to discover how to create copy that converts.

03

Copywriting for Conversion Checklist

Most people are familiar with the story of Goldilocks and the Three Bears. Well, much like the porridge in that story, getting your copy just right can be difficult. Copy that is “too hot” or “too cold” can cost you new customer conversions. Great copy accomplishes a few objectives the moment a visitor arrives at your website or landing page:

- Engages visitors.
- Communicates a relevant and unique value proposition.
- Conveys trust to convert visitors into customers.

Use this handy checklist to assess your current content and identify optimization opportunities.

1 Craft a clear headline by defining your value proposition:

Every company has a unique statement of value - not a tagline, slogan, or mission. It is the essence of what makes your product or service better than your competitors. Create a strong value proposition for your product or service by:

- **Including specific claims** - Shy away from clichés like “high-quality” and hammer home differentiators.
- **Making a promise** - Make a unique commitment to your customers that you’re able to follow through on.
- **Ensuring it’s actually unique** - Find out what makes you stand out in your market. Ease of use? Customer support? Fast implementation and onboarding?
- **Communicating value** - Say why your product or service is worth your customers’ time, money, and information.
- **Engendering trust** - Avoid language and claims that seem too good to be true. Customers need to believe what’s being said.

Evaluate your current headline:

- Does it make a specific claim?
- Does it make a believable promise to the potential buyer/user?
- Does it communicate value?

2 Create copy that highlights the customer benefit:

Too often, companies rely on language that makes sense to them, rather than speaking in terms their customers will understand. Use these tips to ensure you're creating copy that resonates with your target audience and clearly communicates your value proposition.

- Focus on what your customer can do with your product or service instead of highlighting functionality.
- Brainstorm with the people and teams closest to your customers and collect feedback. For example, customer service representatives often have great insights in customer motivations.
- Avoid making "logical leaps" - writing copy based on language and a sequence of actions that makes sense to you.
- Conduct a survey to uncover and frame key differentiators and pain points using language directly from your current customers. Read your customer reviews for inspiration!

Implement a social proof strategy:

Incorporating direct quotes and testimonials from current customers into your copy can help you build trust with website visitors and boost your odds of converting them to customers. Adding company logos, job titles and customer photos to the testimonials helps even more. Reviews and quantifiable data can also help you build trust, convey value, and improve conversions.

3 Choose words that will drive conversion:

Keep these conversion copywriting principles in mind to achieve that Goldilocks “just right” status:

- Stick with second person - talk about your audience’s situation, not what you can do. Check how often you use the word ‘we’ or your company name on a page. Can you rewrite those sentences using ‘you’ instead? ¹⁰
- Incorporating humor or eliciting another type of emotion can be effective at driving conversions.
- Keep your content concise and jargon-free.¹⁰
- Test out adding customer language and social proof to your website and landing page copy.

Optimizing your website copy is a critical component of turning visitors into customers.

But copy is only part of the equation. Continue reading to learn how optimizing the design of your websites and landing pages can improve the user experience and drive conversions.value, and improve conversions.

04

10 UX Design Tips that Drive Conversion

50 milliseconds. That's all you get to form a memorable first impression with visitors to your websites and landing pages. (Coincidentally, that is also the median load time of our [Performance Edge](#) feature that allows you to run blazing fast experiments.)

These pages can contain the most compelling copy you've ever created. But if it doesn't load properly, or if it's poorly designed, that could mean the difference between bounce rates and new business. As more interactions between potential customers and companies occur online, more emphasis is being placed on the importance of the user experience. Consider the following statistics:



51% of people think “thorough contact information” is the most important element missing from many company websites.¹¹



Micro interactions and micro animations, bold colors, thumb-friendly navigation for mobiles, text-only hero images, bold fonts and dark mode lay-outs are some of the design trends that may boost conversions.¹²



A well-designed user interface could raise your website's conversion rate by up to a 200%, and a better UX design could yield conversion rates up to 400%.¹¹

Use this handy checklist to help you design your websites and landing pages with your visitors in mind:

- **Concentrate on one goal** - Identify what action you want your audience to take and make that the focal point.
- **Know your audience** - Identify pain points and preferences, and use this information to inform your design experiments.
- **Craft an empathetic landscape** - Use imagery that connects with emotions like empathy and humor to drive engagement and conversion.
- **Highlight social proof** - Prominently display reviews, testimonials, and quotes to build trust.
- **Keep it simple** - Avoid multiple menu links, long drop downs, and too many options to ensure your pages can be navigated easily.



Design principles you should A/B test - Color contrast:

Color contrast can be used to separate specific design elements from their surroundings. Test contrast levels to draw attention to action items and focal points on your website that drive conversion value, and improve conversions.

- **Use compelling photography** - Captivating, relevant hero images that resonate with target demographics and audience segments can drive conversion.
- **Sticky CTAs** - Design a prominent CTA button that follows visitors as they scroll.
- **Establish human connections** - Persuader videos can work with other design elements like hero images to build trust with potential customers.
- **Anchor tags** - Placing links (sparingly) in the body of your copy to enable easy navigation of your site.
- **Establish hierarchies** - Make sure the visual presentation flows in a logical and compelling way.



Design principles you should A/B test - Focal points:

1. Focal points are certain elements of your website design that capture and hold visitor attention.
2. They can be created with complementary imagery or negative space.
3. Test the placement of different creative elements and see how they impact conversion metrics.

05

Optimizing Throughout the Customer Journey

The customer journey is evolving as consumers communicate with companies across more digital channels. Each interaction is a chance to break through the clutter. Recognizing optimization opportunities at each stage of the journey helps you convert visitors into customers.



86%

of customers want to see products and services displayed on a home page.¹³

64%

expect to see thorough contact information clearly displayed on home pages.¹³



63%

of customers think more positively of brands that provide relevant content.¹⁶

Stage 1. Awareness

At this critical first stage, customers gather information about products, services, and companies. They peruse reviews and home pages for solutions that are able to meet their needs.

✔ Optimization opportunity

A/B test your landing page to make a memorable first impression.¹⁴

1. Try highlighting different value propositions in your main headline.
2. Experiment with variations of hero images.
3. Test different form lengths and CTA copy.

Stage 2. Consideration

Customers narrow the field of potential companies to a select few. According to McKinsey & Company, customer perceptions and prior experiences with brand channels play major roles in the evaluation of companies during this stage.¹⁵

✔ Optimization opportunity

Vary types of content, content length and content authors to help customers along in their decision making process. At this stage assessments, webinars, case studies and interactive content are deemed especially useful.¹⁷

1. Test copy that appeals to emotion versus logic.
2. Experiment with variations of social proof (reviews, testimonials, quotes) to build trust.
3. Consider segmenting audiences and tailoring content based on behavioral data for more personalized experiences.¹⁸



77%

of customers have chosen, recommended, or paid more for a brand that provides a personalized service or experience.¹⁹



63%

of companies that successfully engage their B2B customers realize 63% lower customer attrition, 55% higher share of wallet, and 50% higher productivity.²¹



2.5

Companies at the top of their industries in Net Promoter Scores or satisfaction rankings for three or more years, grow revenues roughly 2.5 times as fast as their industry peers and deliver two to five times the shareholder returns over the next 10 years.²²

Stage 3. Purchase

After pinpointing a handful of potential companies, customers are ready to compare offers and identify which one best meets their needs.

✓ Optimization opportunity

Make the purchase process as painless as possible.²⁰

1. Highlight popular plans or features on a pricing page.
2. Offer personalized product deals based on individual visitor preferences and needs (draw from browsing and purchase history data).
3. Experiment with placing key value propositions adjacent to the buying call to action (CTA).

Stage 4. Upsell

One way to foster continued engagement with and encourage future purchases from new customers is by implementing an upselling strategy.

✓ Optimization opportunity

Keep your customers' needs and expectations front and center.

1. Recommend popular related products and services based on previous purchase history.
2. Experiment with placing top selling products and services above the fold on your website.
3. Target content to return visitors based on categories of interest.

Stage 5. Retention

Congratulations! You've successfully converted a visitor into a customer.

Continued action to build customer loyalty and trust can help you drive business growth.

✓ Optimization opportunity

Make continual optimization a commitment.

1. Gather quantitative and qualitative customer feedback to fuel further testing.
2. Experiment with social sharing buttons and referral programs on confirmation pages.
3. Implement a loyalty program.



Conclusion

You are now armed with the information, tips, and techniques that can help you start identifying optimization opportunities across your acquisition channels.

Use these insights to fine-tune each digital interaction, take advantage of every business opportunity, and convert first-time visitors into loyal customers.

Start experimenting today!

Get started at <https://www.optimizely.com/platform>

Sources

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- ²¹ <https://www.gallup.com/services/169331/customer-engagement.aspx>
- ²² <https://hbr.org/2020/01/are-you-undervaluing-your-customers>

ABOUT OPTIMIZELY

Optimizely, an Episerver company, provides the industry's leading digital experience optimization platform including AI-powered personalization and experimentation, which encompasses A/B testing, multivariate testing, and server-side testing. We take out the guesswork to enable brands to deliver relevant experiences driven by data.

The world's greatest brands choose Optimizely to win and compete in the digital economy, including Gap, StubHub, IBM, The Wall Street Journal, and many more. To learn more, visit [optimizely.com](https://www.optimizely.com).

On October 21, 2020, Optimizely was acquired by Episerver, a leader in the [Gartner Magic Quadrant for Digital Experience Platforms](#).

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