CXL

THE ULTIMATE GUIDE TO CONVERSION RATE OPTIMIZATION

Welcome to the Ivy League of CRO

Let the top conversion optimization minds teach you how to double your conversion rate.

This expert guide will help you…

- Increase conversions with persuasive copy and UX / design.
- Grow your email list and send more strategic emails.
- Setup Google Analytics to measure the right stuff and gather insights.
- Conduct qualitative and quantitative research to run smarter A/B tests.
- Create a systematic, repeatable conversion rate optimization process.

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This guide on conversion rate optimization is for people new to it. It's also important to note right off the bat: we're not really optimizing for conversion RATE, but business growth.

If higher conversion rate would be our sole objective, we could lower all our prices to $0.01 – conversion rate would go instantly up, but we would go out of business. It's important to realize that in the end it's just a helpful metric. Our main goal is to grow the business, acquire customers faster and cheaper.

Bart Schutz of Online Dialogue and The Wheel of Persuasion on using psychology to increase conversions.

Emotional Targeting 101 by Talia Wolf
Talia Wolf of Conversioner talking emotional persuasion. Building on what we learned from Bart, she explains how to appeal to your visitors' emotions.

How to Build a List and Send Emails That Convert by Justine Jordan
Justine Jordan from Litmus walks you through collecting emails, improving your open rate, designing for all browsers / devices / email clients, A/B testing emails and more.

How to Setup Analytics and Measure the Right Stuff by Chris Mercer
Chris Mercer from SeriouslySimpleMarketing.com on how to setup your analytics in a meaningful way that ensures you're gathering useful data.

How to Use Analytics to Find Insights by Yehoshua Coren
Yehoshua Coren, the Analytics Ninja, walks you through extracting insights from your analytics using segmentation.

How to Gather Qualitative Data for Insights by Jen Havice
Jen Havice of Make Mention on how to use qualitative research to answer one of the most important questions in conversion optimization: Why?

What to Test (Conversion Research) by Michael Aagaard
Michael Aagaard, senior conversion optimizer at Unbounce, on how to strategically decide what to test using conversion research.

How to Run A/B Tests by Peep Laja
Peep Laja teaches you everything you need to know to run valuable, statistically valid tests that will actually lead to applicable insights.

How to Create a CRO Process by Peep Laja
Peep on how to combine everything you've learned into a systematic, repeatable CRO process.

Introduction to Conversion Optimization by Brian Massey

Several years ago, TXU Energy introduced its new internet-enabled thermostat, the iThermostat. This was TXU's version of what Nest became, a thermostat that you could monitor and change from any computer or device attached to the internet.

One of the tests we ran at Conversion Sciences was an email test. We wanted to know if we could increase sales of the iThermostat by changing the subject line of the promotional email sent to TXU customers. We composed subject lines to appeal to three types of buyers we were targeting.

When we had completed our tests, the top two subject lines were, "Now you can control your thermostat online" and "Get the Internet Thermostat for $49.99 Installed."

These two subject lines looked like they were tied. The same number of people opened them, and they generated about the same number of clicks.

One of them however, generated 25% more sales. The subject line "Get the Internet Thermostat for $49.99 Installed" delivered a whopping 64% more sales than the control, "Limited-Time Offer: Save 33% on the TXU Energy iThermostat."

Process Is Everything

These results were only meaningful because we had used proper CRO techniques when we set our test up.

First, we used exactly the same email copy for each subject line. Likewise, we used the exact same landing page. This way, we could be sure it was the subject line causing the changes in sales. We randomized selection of the email addresses into groups so that there wasn't any unexpected bias.

Finally, we measured success all the way through to the sale. Had we only focused on open rates and click-through rates, we would not have picked the subject line that ultimately generated the most revenue.

How can one subject line generate more sales when the same number of people are clicking through as with other subject lines? Did the subject line somehow prime the reader to buy? Did the winning subject line cause those more likely to buy to click through?

Conversion optimization is complex. If a marketer isn't careful, she is likely to make incorrect assumptions about what her visitors want from her and what makes them buy.

This course is designed to help you make good decisions about how to get more conversions: more buyers, more tryers and more subscribers.

So, What Is CRO?

The acronym "CRO" stands for "Conversion Rate Optimization." The conversion rate calculation is popular because it can be applied to a wide variety of actions, from list signups to software trials to ecommerce purchases. It is calculated by dividing the number of people taking an action by the number of people who are asked to take an action.

This allows us to understand how well an email or page or ad is performing regardless of how many people see it. We might see 10% more sales this month than last and believe that is good.

But if visitors to our site increased by 20% at the same time, then our conversion rate is actually going down. Sales have increased, yet something is causing us to sell less as a percentage of visits.

In email marketing, for example, there are a number of conversions that take place. Recipients of the emails must open them. Those who open must click on an offer and be brought through to a landing page. Those who see the landing page must take action.

Each of these is a conversion and each can be improved with the right process.

Is CRO About Fast Wins?

It takes time and discipline to find the right process for your business and products. But, when you do, it will be a source of revenue for a long, long time.

This course describes exactly how to apply CRO disciplines that turn traffic into subscribers and / or buyers. The contributors are the best in the industry and recognized leaders in their areas of expertise.

Building a CRO Machine

We first learn how to build email lists from the traffic we get to our websites. Then we are guided through the process of crafting email and landing page copy that turns subscribers / visitors into buyers. The course then tames research and analytics, showing us what to measure.

Once we have a foundation laid down, we are taken through the disciplines of creating and executing tests. It is through testing that you will find the insights that turn ordinary email lists and landing pages into real business assets.

Finally the course draws all of this into a process that ensures you'll enjoy strong results week after week, test after test.

It can take years to find the right mix of frequency, content, offers and calls to action that make your website / company profitable. This course slashes the time it takes.

Like TXU, there is more revenue to be found. All you have to do is find the right components for your unique audience. This course will show you how.

Takeaways

1. Always tie your tests back to bottom-line goals. Measure tests all the way through to the sale.
2. CRO isn't about quick wins. It's about meaningful tests backed by thorough conversion research and executed using a disciplined, step-by-step process.
3. There is always more revenue to be found. Conversion optimization is never finished.

For more from Brian, check out Conversion Sciences.

How to Write Copy That Sells Like a Mofo by Joanna Wiebe

Copy that sells doesn't sell broadly.

Copy that sells speaks in real words to a real audience made of real people. That audience may be large or that audience may be small, but it is never made of *everyone*.

To write copy that sells, you start with the ideal prospect.

I'm not talking about starting with personas. Those are all fine and good, but they're a cardboard cutout of the real person holding the real credit card. Too often, a persona is simply demographics strung together and topped off with a stock photo. What's wrong with that? Well it's not terrible, but it's just a sliver of what really matters.

As the folks at The Rewired Group teach, you don't buy the Wall Street Journal because you're 55, you're male, you've got 2 kids and you bring in between $125 – $250K a year. That may all be true of the average WSJ reader, but it's not compelling. Something *motivates* you to buy the Wall Street Journal – and that's what we need to know to start writing copy that sells the Wall Street Journal. (In fact, to sell the Wall Street Journal, copywriters have done anything but worry about demographics, as this famous WSJ sales letter demonstrates.)

To write copy that sells, we need to start with a deep understanding of our prospect. So this is how I approach conversion copywriting:

1. I begin by trying to understand the stage of awareness of the prospect visiting the page in question or reading the email in question.
2. Then I dig into learning about them, about their motivations and anxieties, about the business, and about the product or service. This is the *research and discovery* phase of conversion copywriting.
3. I then synthesize what I've learned into a messaging hierarchy.
4. Which leads to a wireframe (for web pages) or a "spit draft" (for emails, long copy, etc).
5. I then swipe sticky messages from the research I've done and combine that with proven formulas to revise the placeholder messages in the wire or spit into actual copy.
6. Edit.

7. Split-test where possible.

The first five parts of the conversion copywriting process are 100% about the prospect. You barely write copy at all in this process – most of what you'll write is swiped from "voice of customer" data and paired with swiped formulas. (Check out this case study to dive deeper.)

Step 1: Find Their Stage of Awareness

How much pain is your prospect in? How excited about your product is your visitor? You won't be able to write a page or email that converts without answers to questions like those, which speak to the stage of awareness of your prospect. Those stages are:

- Completely unaware
- Problem aware
- Solution aware
- Product or brand aware
- Most aware

Completely unaware people may search long-tail keyword phrases, while product aware may use branded phrases and most aware may use buying-intent phrases, like "buy refurbished Macbook Pro laptop sale."

(You should get skinny on the 5 stages here.)

It's critical to know where your visitors to a page or your email subscribers sit on the awareness spectrum so your copy is better able to join the conversation happening in their minds. And this is why we don't land all our ads on the same landing page. Because there are different convos happening depending on the stage you're in.

Once we know where they are, then we can start to learn about them…

Step 2: Befriend Each Prospect

This is technically the research and discovery phase, but you don't research just so you can get the facts needed to convince. You research to become friends with the prospect, as cheesy as that may sound. I firmly believe you have to *like* your prospects in order to write convincingly and sell authentically. You can't be afraid of them, and you can't fake laugh at their jokes while trying to catch a glimpse of the size of their wallet. That's why we need to get to know and like them.

With research.

This course is going to teach you all about researching to get insights, so I won't go into the details. But I will say that, in my experience, you must **run surveys and do one-on-one interviews** with current customers, former customers and prospective customers.

Open-ended questions are more helpful for copywriting than Y/N questions. You need to not only hear about who they are and what they want and need but also to find the words they use to express those things. (We'll want to swipe their language when it comes time to write.)

My absolute favorite question to ask because it reveals so much is this:

"What was going on in your life that compelled you to come looking for a solution like ours?"

Answers to that question reveal the conversation happening in your prospect's mind. Their motivation. The struggles that caused that motivation. The payoff they're in search of. In real words. So you don't have to guess or summarize.

I also like asking customers to describe the biz, brand, product or service in 2 words because that tells me what adjectives to use. I love asking them to talk about a time when they got surprising results with the product. And I dig asking for unexpected ways they've found value with the product; these answers will eventually fill my page with specific, powerful bullets, like so:

All of those examples came from answers to that survey question.

You should also get to know the ins and outs of the business and its products or services. Map features to benefits, collect testimonials, understand goals, etc.

Step 3: Synthesize and Order

Block off a day or two to pore over everything from Step 2, document what you've learned and then use that to help make sense of what you need to say to prospects in X stage of awareness.

Don't summarize; synthesize. Try to make sense of what you're learning without muddying it up by adding in your own assumptions. Your job isn't to think for your prospect; your job is to listen to them and then turn what they said into copy that will persuade them. (As I mentioned earlier, copy that converts is ALL about the prospect.)

You'll not only organize what you've learned. You'll also take note of particularly sticky language they use.

I finish this step with a written report, which I refer to constantly when writing copy. One of the tables in this report is directly below. In it, I paste the problems customers say X product has solved for them, the corresponding benefits of having those problems solved, and how frequently this solution is mentioned by customers. The more frequently something is mentioned, the higher in the messaging hierarchy it is likely to go.

PROBLEMS ELIMINATED	BENEFITS	FREQUENCY OF MENTION

Step 4: Wireframe or spit-draft.

Copy leads design. If you don't believe and practice that, your copy is not going to convert as well as it could. Don't cram copy into lines of lorem ipsum. Don't start with the salesroom (design). Start with the salesperson (copy).

By now we know the stage of awareness of the prospects arriving on the page or reading the email we're about to write. We asked my fave survey question, so we know what is likely to be going on in their minds so we can join that convo right at the top of our page. And we synthesized our insights into a report that helps us understand the order of the messages that we should share with the prospect based on where they're at today and where they want to be.

So now we lay out the messages – not the copy – on the page.

NOTE: The message is what you say; the copy is how you say it.

Here's an example:

Step 5: Write with Your Prospect's Words.

Take the sticky language you documented earlier, and use it to revise the placeholder messages on the page. You're not writing copy; you're feeding your prospect's words right back to her. We want her to see herself on the page. We're selling her a better version of herself. So we use her words, not ours.

If she uses jargon, we use that jargon.

If she writes "cuz", we write "cuz."

If she wants to double her revenue while working less, we tell her how she'll double her revenue while working less.

Always in her words. If we don't know what words she'd use for a particular message, we go back to the research phase to find out, often in innovative ways like this, which save time and reveal natural language.

From there, we optimize our phrasing using tried and true copywriting formulas. Using formulas makes our headlines pop, makes our bullets engage, makes our videos hold attention, makes our buttons compel clicks.

Simply: combine the words of your customer with the formulas of great copywriters.

Step 6: Edit.

Let your copy sit for a day or so. Then read it over with fresh eyes.

- What's confusing? What needs clarification?
- Which lines read like they're trying too hard? Which aren't trying at all? Which would be more believably expressed in a testimonial?
- Is every claim or point proven with a testimonial, a screenshot, a demo or some other form of support? If not, why not? How can we fix that before hitting publish?
- When the CTA appears, does it do so too early for our prospect in their stage of awareness… or too late? Is any anxiety, objection or design issue getting in the way of the prospect confidently clicking the button?
- Is it clear that their pain will continue or their lack of delight will continue if they fail to act now?

Revise accordingly.

Step 7: Split-test.

I'm not going to tell you how to split-test. I mean, you read CXL, so you've got the resources to cover this step.

I will say, though, that split-testing is a game-changer for copywriting. Rather than writing by committee and doing round-table copy reviews (which just empower a whole bunch of folks that haven't done the first 6 steps to chime in with wild guesses), split-testing answers real questions about whether your copy is working or not.

Please, please, wherever possible, test your copy.

I'll finish with this: the better your solution solves a problem, the better your copy will work. Copy can't save a bad product. And copy can't do much if you haven't found product-market fit yet.

But, if you've got a great solution for a real problem – which is probz true if your retention and referrals are high – great copy will be the most inexpensive and most productive salesperson you've ever hired.

Takeaways

1. Understand your audience inside and out before you begin writing anything. Conduct the research. Learn about their motivations, fears, intentions.
2. Create a messaging hierarchy. What problems and benefits were mentioned most often during the research phase? Use them to create a landing page wireframe or first draft.
3. Test, test, test. You can do the research and follow the process, but A/B testing your copy is the only way to go from good to great, from great to remarkable.

For more from Joanna, check out Copy Hackers.

Introduction to Designing for Conversions by David Kadavy

Let's get one thing out of the way that is already on the minds of some of you…

…it's true, I'm not a big fan of conversion optimization.

Some of you may have seen my article where I tried running nothing but A/A tests for 8 months, and found all sorts of misleading "results".

The moral of the story is if you have a low baseline rate, not a lot of traffic and don't know your statistics, you can lead yourself astray.

I assume all of you have learned that by now, but I wanted to get it out of the way.

BUT, there's another thing I hate about conversion optimization. That's some of the design myths I see thrown about. I'm here to dispel some of them.

There Is No "Best" Button Color

The more experienced among you already know that "button color" talk is the lowest-common-denominator of CRO talk. But, I still get asked about it all the time.

To put it simply: There is no best button color.

Some people say, "The most popular 'favorite color' is blue, so buttons should be blue." Well, look at this example.

Green beat blue in this case, increasing sales (not just CTR) by nearly 36%.

“Well,” some might say, “they would have increased conversions EVEN MORE if they had used *red*. Warm colors, like red, are exciting. So, CTA buttons should be warm colors.”

I’ve even heard some take it as far as to say, “Red is *the best* button color.”

Okay, let’s see if that’s right. Here’s a test that Verizon ran. One has lots of red buttons and one has lots of buttons that are kind of a dark, boring, muddy gray. It’s like the button was walking down a country road and got sprayed by a jalopy driving through a puddle.

This is a no-brainer, right? Clearly the red buttons will win.

Nope. The dark gray buttons boosted clicks by 10% over the red buttons.

How is this possible? Well, I posit that since Verizon's branding is red, the red buttons get lost within the page. The buttons don't contrast the rest of the page enough.

One thing that tends to work in conversion-centered design is creating contrast wherever you'd like the user to take action.

Note how the blue color in the first example didn't contrast well and how the red buttons blend in with the rest of the Verizon page. The winning options were both colors that created more contrast.

There Is No "Best" Font

Another question I get asked very often is, "What's the best font for conversions?"

Again, the unsatisfying but true answer is: There is no best font.

What I *can* tell you is that the font you use should be clear to read, and should convey a mood or personality that is appropriate for your brand.

If you have a good designer, that person should be able to help you narrow down the right font choice.

But, if you're driving your own design, the best advice I can give you is to keep it very simple. If you think the font looks "cool", then it's probably the wrong font.

In my own email course, I provide a list of recommendations and details that are outside the scope of this lesson.

I can tell you this simple thing, though: If you're doing your own design, just pick ONE good font. It will free you up to concentrate on the stuff that matters (more on that in a bit).

There Is No Design "Silver Bullet" (But Here's What DOES Work)

If you've noticed a theme so far in this lesson, it's that there is no one simple thing that you can do to your design that will *always* increase your conversions.

However, all of the winning landing pages I've seen have one thing in common: It is very visually *clear* what they want the user to do next.

For the sake of reducing variables, let's look at this simple test. Which one do you think won?

You may think that Oli's sexy v-neck would build trust, thus increasing conversions like a kajillion percent.

But, in fact, Oli decreased conversions by 14% (at a 99% confidence level, by the way).

Forget everything you *think* you know about psychology, or whatever reasons you might have for thinking Oli's smiling mug would increase conversions. Just take in the whole section as if it were a work of art. Squint your eyes a little bit and concentrate on the "Start…" button.

Do you notice anything?

Oli's face COMPETES for visual attention with the "Start…" button. Not only are Oli's stunning good looks a distraction, but his presence takes away valuable white space that could be used to draw attention to the "Start…" button.

Let’s see these concepts in action at a slightly higher level in this test.

Original

Variation

The variation outperformed the original at an incredible 606%! Take some time to think about why.

Look at all they’re trying to do to convince you to sell your t-shirt designs in the original: “you do the fun part,” “we do billing and shipping, etc.,” and “oh, look at who ELSE is using our service” (social proof). Finally, amongst all of this, there’s the (warm-colored) call to action button.

In the variation, everything is much more clear. They’ve reduced the excess language about “fun” and them “[taking] care of the rest”, and boiled it down to what people pay attention to: “make money”.

Also (and, I posit, just as importantly), the design is much more clear. The CTA is centered in the composition, on its own row, with plenty of space around it. It stands out and it’s clear what they want the user to do.

So, here’s what DOES WORK when designing for conversions: Make your business objectives visually clear.

By that, I mean that, generally, whatever action you want your user to take, the place where they can take that action should be the most visually compelling part of the page. Use contrasting colors, clear typography, well-considered white space, and compositional forces to make it clear to your user what they should be doing.

Takeaways

1. There's no such thing as a "best button color". Contrast is what really matters. Does your call to action pop?
2. There's no such thing as a "best font". Different fonts create different moods, so it depends on your audience. Legibility is what matters most.
3. Visual clarity is the key to conversions. Your design can be clear or complex, just like your copy. Remove distractions from your call to action, add space around your call to action and simplify all of your design elements.

For more from David, check out Design for Hackers.

How to Use Psychology in Conversion Optimization by Bart Schutz

You, as someone working in marketing, are helping to create, communicate, deliver, and exchange products and/or services that have a value for customers.

But customers are brains… The processes that take place in their 3 pounds of cortical proteins and fats ultimately determine their purchasing behavior. Hence, this 'short intro' to the psychology behind CRO.

First, an A/B test case. Which variant causes 12% more people to book a Van der Valk hotel room?

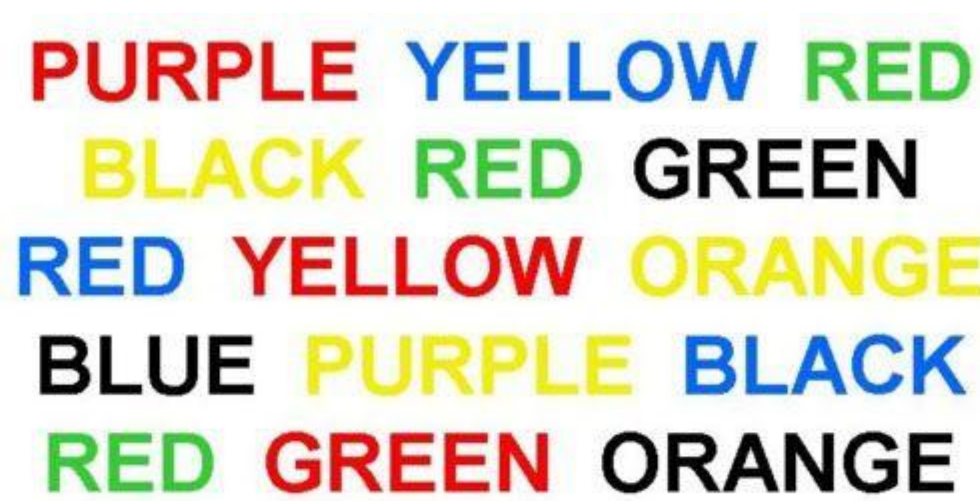
Most people say they prefer the variation without the annoying popup, but the conversion rate is higher *with* the popup. How can a decrease in usability lead to more sales?

Customers Are a "Dual Processing Brain"

Although psychologists have been studying this for over 50 years, it is mainly thanks to Daniel Kahneman – a leading psychologist, the spiritual father of behavioral economics and winner of the Nobel Prize – that people are realizing that our brain is home to 2 systems:

- **System 1** is the oldest system (600 million years). It works on the basis of intuition, emotions, habits, prejudices and “heuristics”. It functions outside of consciousness, completely automatically and processes enormous amounts of information with seemingly little or no effort. All without the feeling of voluntary control.
- **System 2** is a relatively new system (it became really apparent only 70 thousand years ago during ‘the cognitive revolution’). It is a conscious, rational, systematic and logical system. It uses scarce mental energy to control the impulses of System 1.

An easy way to experience both systems yourself is the Stroop Test. Read out loud the color of the words displayed below. You’ll probably find yourself (System 2) struggling to fight the automated (System 1) response, which is to read out the word instead of its color.



System 2: Conscious, But Usually Absent or Quickly Depleted

Our System 2 has certain prominent characteristics. Since this is just an introduction, I'll stick to three.

1. Usually absent

First of all, it's good to realize that our conscious System 2 is absent when we make most of our decisions (though we have the illusion that we are in control).

An example: "I have two kids, one is a boy. What is the chance that the other is a boy too"? Most people answer 50%. But that's not the logical answer. System 1 answered an easier, automated question ("What's the general chance of having a boy or girl?") and System 2 was absent.

2. Lying

Our consciousness (System 2) is "post-decision rationalizing" all the time. If it was not involved (absent or depleted), it will make up "rational reasons" after the decision was made purely subconsciously.

3. Limited capacity

System 2 has a "very, very limited capacity". For example, one group is asked to remember the number 39 and another group to remember 3,852,869. While remembering the numbers, they're asked to choose a reward: chocolate cake or fruit salad.

The "39" group chose chocolate cake only 41% of the time. Even though System 1 craves the cake, they have enough System 2 capacity left to control their impulses. In the other '3,852,869' group, less System 2 capacity is left, and a staggering 61% opts for the chocolate cake.

Ego-Depletion: Indicator of System 2

One of the results of our limited mental capacity is that our System 2 depletes during the day. We make more rationally controlled decisions in the morning, and more emotional ones at the end of the day.

Therefore, it helps to plot your conversion rates based on the hours of the day and week. If you find a graph like the one below, you likely operate in a System 1-driven market (since lower impulse control leads to higher conversion rates).

Hour	Total	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Average CR% (unweighted)
0:00:00	5,6%	5,5%	5,7%	6,0%	5,8%	5,4%	5,5%	5,4%	5,6%
1:00:00	5,6%	5,7%	5,9%	5,8%	5,6%	5,7%	5,0%	5,3%	5,6%
2:00:00	5,6%	6,1%	5,6%	5,5%	5,9%	5,8%	5,0%	5,5%	5,6%
3:00:00	5,7%	5,6%	5,7%	5,9%	6,0%	5,5%	5,5%	5,7%	5,7%
4:00:00	5,5%	5,5%	5,6%	5,7%	5,6%	5,4%	5,4%	5,4%	5,5%
5:00:00	4,8%	4,7%	4,8%	4,9%	4,7%	5,0%	4,5%	5,1%	4,8%
6:00:00	4,3%	4,1%	4,3%	4,4%	4,6%	4,0%	4,2%	4,7%	4,3%
7:00:00	4,0%	3,7%	4,0%	4,0%	3,9%	4,2%	4,3%	4,3%	4,1%
8:00:00	4,2%	4,0%	4,2%	4,3%	4,4%	4,1%	4,5%	4,5%	4,3%
9:00:00	4,4%	4,1%	4,3%	4,3%	4,5%	4,5%	4,9%	4,7%	4,5%
10:00:00	4,7%	4,4%	4,5%	4,6%	4,6%	4,7%	5,0%	4,9%	4,7%
11:00:00	4,6%	4,1%	4,5%	4,6%	4,5%	4,6%	5,0%	4,8%	4,6%
12:00:00	4,5%	4,1%	4,4%	4,4%	4,3%	4,6%	4,8%	4,9%	4,5%
13:00:00	4,5%	4,1%	4,4%	4,5%	4,4%	4,8%	4,7%	4,8%	4,5%
14:00:00	4,7%	4,3%	4,7%	4,7%	4,5%	4,9%	5,0%	4,9%	4,7%
15:00:00	4,8%	4,7%	4,6%	4,5%	4,8%	4,9%	5,0%	4,9%	4,8%
16:00:00	4,9%	4,5%	4,7%	5,0%	5,0%	5,0%	5,0%	5,2%	4,9%
17:00:00	4,9%	4,7%	4,7%	5,0%	5,0%	4,9%	5,2%	5,0%	4,9%
18:00:00	5,0%	4,7%	4,7%	5,2%	5,1%	4,9%	5,2%	5,2%	5,0%
19:00:00	5,3%	5,1%	5,0%	5,4%	5,5%	5,5%	5,1%	5,3%	5,3%
20:00:00	5,6%	5,7%	5,4%	5,8%	5,6%	5,3%	5,4%	5,6%	5,5%
21:00:00	5,8%	5,6%	6,0%	6,2%	5,7%	5,5%	5,5%	5,9%	5,8%
22:00:00	6,0%	5,9%	6,4%	6,2%	6,1%	5,7%	5,4%	6,0%	6,0%
23:00:00	5,8%	5,5%	6,0%	6,0%	6,0%	5,5%	5,6%	6,1%	5,8%
Average CR% (weighted)	5,0%	4,8%	4,9%	5,1%	5,0%	5,0%	5,0%	5,2%	5,0%

System 1: The Always Awake, Multi-Tasking System

So most of our decisions are made by our subconscious and all of them are influenced by it. This automated system is:

- always on,
- makes decisions on the fly,
- is based on an associative neural network,
- processes information extremely quickly, and
- judging –almost always correctly– in a fraction of a second.

Our automatic System 1 is therefore the true superhero in our brain. But one email is too short to explain anything more about the hundreds and hundreds of biases, emotions and heuristics it operates on. Please read my blog for some techniques.

How to Persuade a Dual Processing Brain

An example where System 1 totally determines the decision and System 2 should not get involved is this flash deal site. We deleted CTAs and made prices less apparent to keep System 2 asleep. Moreover, we made System 1 a bigger fan by adding large images and heart symbols.

Yet sometimes it is totally the other way around. For example, when opening a savings account. We need System 2 to take and stay in control in this case, since System 1 would love to spend the money on more instantly rewarding things (like one of those flash deals).

In the example below, we took away the (distracting and depleting) navigation. Most importantly, we put the full focus on only one of the interest rates (preventing System 2 from doing the depleting calculation).

Now think back to the Van der Valk hotel case. Although our System 2 dislikes the energy-costing popup, our System 1 experiences something different.

It sees a first click, and automatically draws the conclusion that you like this site better than others (that you did not click). It will remain consistent with opinion, and is thus more likely to book a room after the user-unfriendly popup.

Customer-Centric? Dual Process-Centric!

So, psychology teaches us that consumer behavior and user experience are extremely complex (fortunately). At the core, there are 2 systems that determine behavior and experiences. You can use this knowledge about psychology to make true sense of your CRO efforts, and make them more effective.

Takeaways

1. Try to map which system is in control on each page of your site and in each visitor segment by re-analyzing your data and test results.
2. For System 2, focus on one thing. Offer post-decision alibis, make it effortless.
3. For System 1, start learning more about the hundreds and hundreds of persuasive biases and heuristics to make the most emotionally delightful experience possible.

For more from Bart, check out Online Dialogue and Wheel of Persuasion.

Emotional Targeting 101
by Talia Wolf

When it comes to CRO and optimization in general, we're constantly thinking about how to grow our numbers and scale the business. Using various techniques and tools, we push forward to acquire more customers and generate more revenue.

So, it's great that businesses want to generate more revenue and grow, but customers don't really care about that. There are many competitors out there selling the same stuff and trying to grab their attention. How do you convince your visitors to invest in you?

If your answer is "we have amazing features" or "we're cheaper than our competitor", allow me to stop you right there. You're doing it wrong.

Research done in the past 35 years shows that emotions "powerfully, predictably, and pervasively influence decision making" (Lerner et. al.).

In fact, recently, neuroscientist A. Damasio studied individuals who had brain damage in the area that generates emotion. When asked, these people found it difficult to make even simple decisions, such as what to eat (pasta vs. a sandwich).

The research highlights the fact that those who base their marketing on pure logic and reason are doomed to only go so far because they do not understand what truly motivates people's decision making processes – emotion.

"Hence, in order to have anything like a complete theory of human rationality, we have to understand what role emotion plays in it."

H. Simon, 1983, Reason in Human Affairs

Marketing, and CRO specifically, is more than just analyzing data and understanding online behavior or leaks in a funnel. It's about understanding people's decision making processes, and catering to emotional needs. Appealing to them on an emotional level and helping them rationalize their decision making process. It is our job as marketers to drive logic where emotion lays.

When we buy something, we don't purchase a "product", a special price or features; we purchase an experience and a better version of ourselves.

The only way to optimize your funnel, increase sign ups, create a better user flow or even a better product is to constantly ask yourself, “What’s in it for my customer?” and, “How can I cater to their needs?”

What’s In It For Customers?

Many brands are trying to convert your customers, which is why before asking people to subscribe to your newsletter list, for example, you must have a clear strategy that shows customers exactly what’s in it for them. Why should they choose you over others?

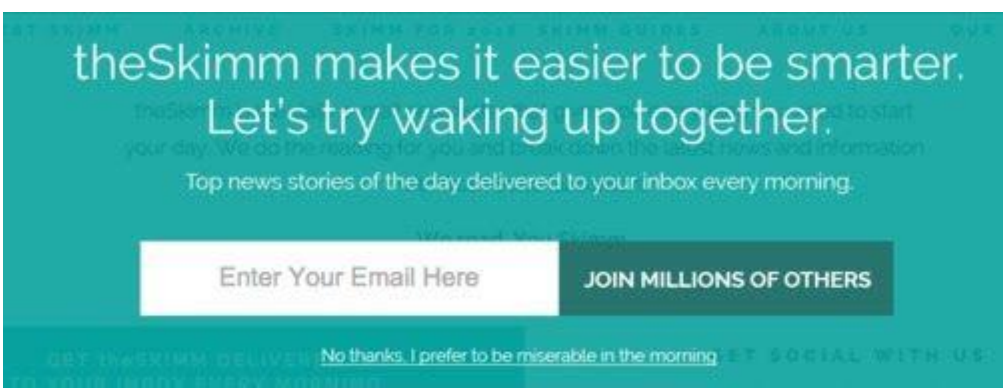
For example, below are two very common emotional triggers that turn visitors into customers:

1. **Belonging** – One of the most common and well-known strategies for signing people up to a service or a mailing list, for example, is giving people a sense of community and exclusivity. Humans are social creatures who love to feel like part of a group and customers often purchase products in an attempt to feel part of a specific group.

Being around people who share our goals or care about the same stuff makes us feel more secure and happy about our decisions. Many companies invite visitors to join the family and receive exclusive personalized offers. Other variations include: “Join X amount of people”, “Join our exclusive mailing list to gain…”, etc.

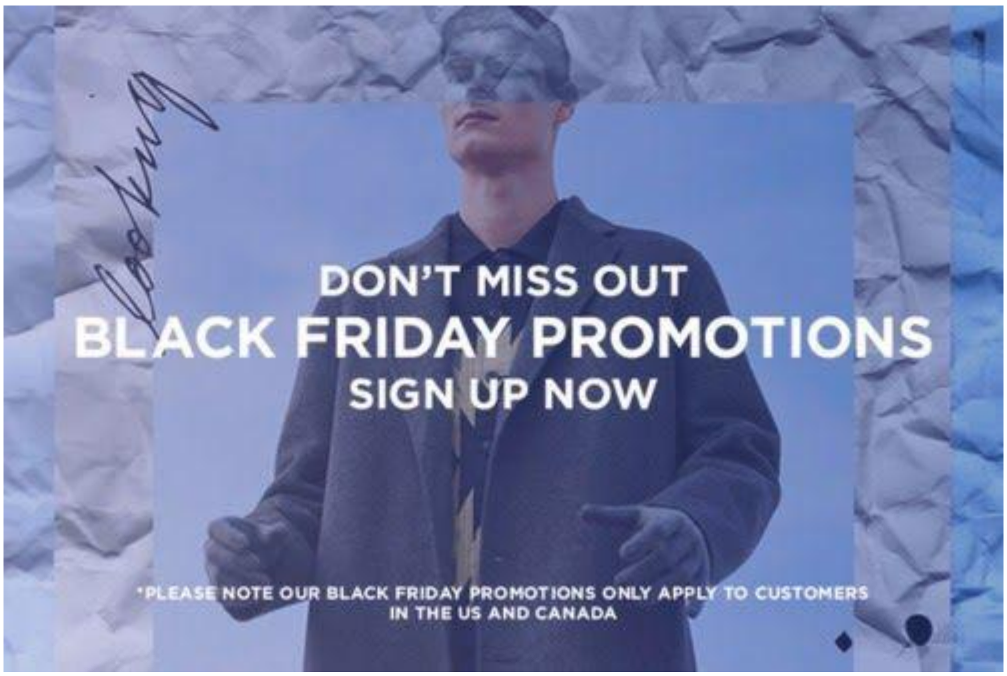
Skimm is probably one of my favorite examples as it utilizes quite a few techniques:

- Making you feel better about yourself – “It’s easy to get smarter .”
- Creating a community – “Let’s wake up together” and “Join millions”.
- Adding value: “Top news stories delivered to your inbox.”



2. **Scarcity** – This strategy capitalizes on “loss aversion”, an emotional trigger or cognitive bias that takes advantage of people’s tendency to prefer avoiding losses than acquiring gains. People just don’t want to miss out, so by letting potential customers know that they could be losing out on something special, you can increase signups dramatically.

Examples include: “Don’t lose this last minute sale” or “Just 5 items left in stock” and “For 24 hours only”. All these examples affect customers in a way that increases conversion rates. In fact, this bias is so strong that many people testify they buy products they weren’t even considering buying.



Exclusive Black Friday promotions for a limited amount of time – join now.

The foundation of marketing is the process of identifying, meeting, and satisfying customer wants and needs. Whether it’s to feel part of a community or boost our self-esteem, everything we buy in life has an emotional reason to it. In order to meet customers’ needs, you must dig deeper and start testing different emotional triggers to identify what drives their actions.

How to Convert More Customers Using Emotional Targeting

To get you started with emotional targeting, I've mapped out the 3 basic pillars you should follow. When launching a campaign, always check you've accounted for all 3 pillars:

1. **Making it about the customer** – The first (and most important) pillar of emotional conversion optimization is making all designs and strategies about the customer. Essentially it's the difference between "This is what **we** do / this is **our** product / this is why **we** are the best" and "Here's how **your** life is going to change for the better".

The landing page below highlights the usability of the product:

Our new variation presents what customers can personally achieve:

Making it about the customer is all about highlighting the customer's personal benefit and value.

2. **Show it, don't just say it** – It's not enough to just tell people how their lives are about to change, you have to make them feel it. Our brains comprehend images far faster than text, which is why listing all your features and benefits won't work as well as making people feel the value with your images, colors, and design.

Take Piktochat for example (again). We don't just say "Make Impressive Infographics", we make people feel it's as easy as magic with our main image. The second variation we created still featured the product, but the end result (the amazing infographics you could be creating).

3. **Testing strategies vs. elements** – For us A/B testing and conversion optimization have always been about acquiring more knowledge and getting to know our customers better rather than increasing a certain KPI.

As a result of testing larger concepts and hypotheses, we achieve more meaningful results. This pillar refers to testing methodologies. Rather than duplicating a landing page and testing a call to action button or a title, start with a more strategic approach and then continue by narrowing it down into specific elements.

Original: The company below states "Amazing Presentations in Minutes" and highlights the product as their hero image.

To make it about the customer, our hypothesis was that people have a hard time creating high quality presentations with PowerPoint and would really like an easy to use platform. We decided to avoid using technical terms and deliver a simple, clear message regarding the product in order to minimize friction and help users relate to it.

Variation: “Finally, enjoy creating presentations!” Now it’s about the customer and their gain. We don’t just say it, we also use specific colors to enhance certain feelings of joy and anticipation. We use a hero shot of a cartoon marketer and tell them they’re about to deliver a “Kickass Presentation”. This variation increased signups by 316% and the creation of presentations by 114%.

Using Emotional Targeting to Master Retention

Our work does not end with making the sale. Retention is key for growth and higher revenue, which is why you should be aware of the cognitive biases that affect your customer's decision making process.

Cognitive biases are "glitches" in our brain that influence us in a way we aren't necessarily aware of. Below are just a few of the biases your customers may be experiencing and some suggestions for how to tackle them for higher retention.

1. **Cognitive Dissonance:** There is a timeframe between purchasing a product or a service and receiving it (or seeing its value) that consumers start second-guessing their decision.

You may recognize this feeling from restaurants. Ever ordered something to eat and as you're waiting for your own meal, see somebody else's and question your original order?

This happens many times with products that are purchased online and are not received on the spot, and with services (e.g. SaaS) purchased online if it takes a long time to get to the value.

This is why it is so important to keep customers excited:

- **eCommerce emails:** "Your package is on its way." Supplying the current location of or an ETA on the package will help increase anticipation.
- **Progress emails:** A great way to keep customers happy and engaged is allowing them to monitor the progress, showing them how far they have come along. Showing your customers reports, numbers and data on their achievements via your service is key for happier and more content customers.
- **Gamification:** People naturally want to succeed. We want to achieve our goals whether it's as proof to ourselves or to others. Gamification helps people become more active and engaged with products and services. The offline world has been using it for years, from Girl Scouts trying to get another badge to grown men and women working hard to lose weight and gain points for it. This is why gamification works well for retention. Allow customers to set goals for themselves and achieve points for taking certain steps (e.g. filling in their profile, reviewing items, writing recommendations and sharing items). Once they get to a certain amount of points, offer a discount on their next purchase or a free gift.

2. **Choice supportive bias:** Generally speaking, we tend to think back positively on our purchasing decisions. We have a tendency to ignore faults or mistakes in our decisions.

Though we may have bought something by chance or on a whim, once we've spent the money, we automatically rationalize why we did so. We like to think of ourselves as rational people that have common sense. In fact, this bias is so strong that if we discover a better deal / platform or service after our purchase, we will still convince ourselves we made the right decision.

This is also known as post-purchase rationalization bias. To capitalize on this bias, you need to reach out to your new customers and create an ongoing relationship. Utilize email marketing campaigns and retargeting.

3. **Status quo bias:** We are creatures of habit. We prefer the familiar, the known and the trusted. Once we've made a purchase in one place, we've made a connection and know how it works. We know how long stuff takes and that we can trust this service. We're already emotionally invested and prefer to stay, even if there's a better bargain somewhere else.

There are a few ways to leverage this bias:

- Emphasize trust and social proof on your landing pages and campaigns.
- Personalize your emails to create a sense of familiarity and strengthen your relationship. Get to know your customer better and push out content that's relevant to them.

4. **Hyperbolic discounting:** Given two similar rewards, people show a preference for the one that arrives sooner rather than later. What this means is that you have to think of more immediate rewards for your customers rather than offering a large reward that seems hard to grasp.

For example, a good way to utilize this bias is by offering a small, immediate coupon for a customer's current purchase or taken action rather than a larger coupon for their next purchase.

There are many other biases and emotional triggers that affect our purchasing decisions. No matter what kind of product or service you sell, the story that will resonate with your customer is not about your product.

It's about the person your customer wants to be and how your product can help them realize that dream. The key to creating meaningful campaigns and tests is tapping into those emotional triggers and focusing on your customer's goals and needs, not your own.

Takeaways

1. Use belonging and scarcity to demonstrate what's in it for the customer. It's all about them, so speak to them directly (e.g. "you") and make a personal connection.
2. Pictures speak louder than words. Show people how your product or service will change their lives.
3. Emotional targeting is key to retention. Using cognitive biases, which affect decisions, you can influence how long (and frequently) your product or service is used.

For more from Talia, check out GetUplift.co.

How to Build a List and Send Emails That Convert by Justine Jordan

Email marketing has the highest return on investment across digital marketing channels, and companies have attributed nearly 23% of their total sales to email. This data (clearly!) shows that email is worth the investment, but how can you be sure that you're experiencing a similar return and getting the most from your email campaigns?

Providing your subscribers with a positive email experience from the signup to the landing page—and everything in-between—is crucial to getting optimal results. I'll cover how to optimize every step of the subscriber experience.

Get the Signup

With optimized signup forms you can acquire more organic subscribers—the ones most likely to exhibit the strongest engagement and stick with you the longest. The ones most likely to convert.

Optimizing your signup forms means:

- Only including relevant form fields. There's a direct correlation between the number of fields you include and the number of people who convert. Don't overwhelm your potential subscribers with long forms. You can use progressive profiling and subscription centers to gain more information about them over time.
- Testing that they actually work. Ensure your forms work and that each signup is being properly tracked in your email service provider (ESP).
- Providing a clear value proposition about why they should give you their email address. Whether it's helpful content or a free t-shirt, make it obvious to them.

P.S. **Never purchase an email list**—everyone that you send to should have explicitly agreed to receive emails from you. Don't run the risk of being unsubscribed from, marked as spam, or even fined for sending unsolicited emails.

Encourage the Open

You've got their email address (congrats!), but now what? Don't ruin your conversion opportunities by sending emails that don't get opened.

1. Use a recognizable from name.

From names are the field that appears first in most email clients, and likely the first thing your subscribers see, so they should be easily recognizable. Typically, you'll find the names of companies, brands, or individuals here.

Consider the relationship between the subscriber and your brand—are they more likely to recognize the name of your brand/product, or the name of an individual at your company? A/B testing over time can reveal the right approach for you—it may be a mix.

2. Optimize your subject line.

Like everything in email, there is no set formula for creating the perfect subject line. What works for one brand, may not work for yours. Like from names, it's a great opportunity for A/B testing.

However, some general guidelines to follow are:

- Be useful and specific.
- Use timely topics and urgency.
- Avoid using promotional or spammy language.

3. Be strategic with your preview text.

Preview text (also referred to as snippet text or preheader text) is copy pulled in from the body of your email and is typically displayed underneath the from name and subject line in a subscriber's inbox.

Not all email clients support preview text —and even when it is supported, no two inboxes look the same. Both placement and character count vary across email clients and apps.

For inboxes that do support it, use this extra line or two—or even three—of text to work alongside your subject line to encourage the open.

4. Include a friendly reply-to address.

Email is a great way to build a personal relationship with your subscribers. And, when subscribers build a relationship with your brand, they are more likely to convert.

When an email's reply-to address is a variation of "no-reply@brand.com," it turns what should be a communication highway into a one-way street—eliminating the opportunity for further customer interaction. It also appears unfriendly, uncaring, and may even affect your delivery rates.

Use a friendly reply-to address (like "hello@brand.com") and encourage this communication. And, make sure responses are going to an inbox that is actively monitored.

Design for Viewing Across All Environments

You've convinced your subscribers to open your campaign. Now it's time to get the email right. While responsive design is a great tactic for ensuring compatibility across all email environments, it's not supported everywhere.

Consider using these mobile-friendly elements as a backup for when media queries aren't supported:

- Strip down content: Only include information that is relevant and needed to convince your subscribers to take an action. Nix all of the extra content and consider putting that on a landing page.
- Simplify your design: Use a one-column design for increased legibility, allowing your subscribers to easily read and interact with your email regardless of whether they're reading your email on desktop, webmail, or mobile.
- Make your text bigger: Use a minimum size of 14px for body copy and 22px for headlines. Your subscribers shouldn't have to zoom-in to read your email.
- Use touch-friendly calls to action (CTAs): Surround each CTA with plenty of white space so they are easily clickable—and touchable. If you're using buttons, use at least a 44x44px button size.

Include a Text Version

Unless you're sending a plain text email, multi-part MIME (Multipurpose Internet Mail Extensions) should be part of every email campaign. Multi-part MIME bundles together a simplified plain text version of your email along with the HTML version of your email.

Sending in multi-part MIME is a necessity because:

- Spam filters like to see a plain text alternative.
- Some email clients and apps can't handle HTML (I'm looking at you, Apple Watch).
- Some people simply prefer it and opt to only receive the plain text version.

Optimize for Image Blocking

While images will be displayed in many desktop, mobile, and webmail inboxes, in some they will be disabled. If you want your subscribers to convert, you must make your email legible—and actionable—regardless of whether images are present or not.

Luckily, there are a number of strategies to help combat image blocking:

- Include alternative text (ALT text): When images are disabled, ALT text renders in place of the image. Use ALT text to provide some context for subscribers when images are disabled.
- Use bulletproof buttons: CTAs should be viewable—and actionable—regardless of whether images are present or not. Add a little HTML and inline styles and rest-assured that your CTA buttons will display even when images are blocked.
- Balance imagery and text: Use a balance of live text and imagery to ensure your email is legible and easy to interact with regardless of whether images are present or not.

Preview Your Emails Before Sending

There are seemingly countless ways that email clients can break your designs. What looks great in one inbox, could look completely mangled and broken in another. Preview your campaigns across mobile, desktop, and webmail clients before sending. You've convinced your subscribers to open your email—don't ruin it with a broken design.

A/B Test to See What Works

Use A/B testing to compare the results of one version of an email against another version of an email. It can give marketers concrete evidence of which tactics work on their audiences and which don't. There are countless things to test, including: headlines, preview text, from names, and images. It's one of the most effective and easiest ways to make measurable improvements to your campaigns.

Don't Forget About the Landing Page

Your subscriber's experience doesn't end with your email—it continues onto the landing page or website. Similar to the email, keep the content streamlined and include a clear CTA. Also, if your email is mobile-friendly, your website should be, too. You wouldn't want your subscriber to get all the way to the landing page only to be turned off by an inaccessible experience. Make it as easy as possible for them to take the desired action.

Some Emails You Should Be Sending…

So you've learned how to get your subscribers to subscribe (so meta), encourage them to open your email, optimize your email's design, and more. But, none of that matters if you aren't sending emails that your subscribers want.

While this could be a course in and of itself, here are some emails you should be sending:

- A welcome email: Once your subscribers give you their email address, be sure to send a welcome email. Whether it's welcoming them to a newsletter, or a free trial, thank your subscribers for signing up. You're top of mind at this point, so they will be expecting an immediate email from you.
- Onboarding emails: Send a series of emails to educate subscribers on the value of engaging with your brand and with your emails. Get new users to engage with

the different features of your product and using your product as much as possible.

- Triggered emails: Send highly personalized emails by triggered messaging based on user behavior. For example, if someone has downloaded an eBook, but isn't a current customer, send an email that relates to the eBook and ties in the benefit of your tool(s). Or, if an active user is on a lower-priced, limited plan, trigger an email based on the benefits of upgrading.
- Transactional emails: Transactional emails give customers the peace of mind that their transactions have been processed properly, but they're also a good opportunity to elicit further conversions. While the focus of these emails should be on the transaction itself, cross-selling (and upselling, where appropriate) is a great tactic.

Send Emails That Convert

Doing email marketing right is all about sending the right message to the right subscriber at the right time. Optimize for every step of your subscriber's journey. And, remember that no part of email is "set it and forget it." Always be testing and on the lookout for ways to improve your campaigns.

Good luck on your journey in sending better email! If you have any questions, please feel free to reach out on Twitter.

Takeaways

1. Optimize your signup form by only asking for necessary information, testing the submission process (on all browsers, devices and email clients) and testing your list's value proposition.
2. Always include a plain text version of your email and take the necessary steps to combat image blocking (e.g. include alternative text, bulletproof buttons and imagery).
3. A/B test headlines, preview text, from names and images. Most email marketing tools make split testing very easy, so take advantage of it.

For more from Justine, check out Litmus.

How to Setup Analytics and Measure the Right Stuff by Chris Mercer

Before you optimize… you measure.

That's where analytics, and more importantly, the proper setup of analytics comes in.

There are plenty of analytics packages available and your client may be using high end tools like Adobe Analytics or something simpler, like Kissmetrics or even Clicky.

However, the chances are excellent they'll be using Google Analytics as well.

For the remainder of this email, we'll be covering how to setup Google Analytics to make sure that it's telling you a *useful truth* (remember "useful truth" – you'll be seeing it again).

First, a quick answer to a popular question…

I'm often asked, "If I'm using software like VWO or Optimizely, doesn't that already measure my conversion rates? Why do I need additional analytics?"

The short answer is: You could do that, but you'd be missing out.

Missing out on the chance to segment your data (e.g. mobile vs. desktop, location, traffic source or demographic).

Missing out on a chance to DOUBLE CHECK the results. When it comes to analytics *the truth* is in the trend. When you only have one source of measurement you are forced to assume that the one source is correctly measuring… and that's dangerous.

Every optimization tool (like Google Analytics) will give you a version of what it sees as "the truth" when it comes to the data. You don't want the truth though… you want a *useful truth*. Sometimes you can only see a useful truth by comparing the results of two or more different tools against each other.

Your New Best Friend…

Now that we've covered the "why" behind properly setting up Google Analytics. It's time to introduce a partner tool that'll help you "supercharge" your setup.

It's called "Google Tag Manager".

Tag Managers were created to solve an enterprise level problem.

In the past, when someone in the marketing department wanted to put something as simple as a Facebook conversion pixel on a page, they'd have to create a ticket and hand everything over to IT. Typically, IT had plenty on their hands already and after a fairly lengthy process, would eventually get that pixel live on the site.

That's a painfully slow way of doing things though.

Tag Managers were built to give the marketing team a way to update their site and, at the same time, free up the IT team to focus on more important projects (like that new cart design).

Think of them as a "dashboard" for anything related to tracking.

In 2012, Google announced their own Tag Manager and ever since "Google Tag Manager" has grown in both users and features.

There are three main parts to GTM (Google Tag Manager).

- **Tags** – Tell GTM *what* you want it to do. For example, "Send a Pageview to Google Analytics."
- **Triggers** – Tell GTM *when* you want it to fire the tag. For example, "Anytime someone visits a page."
- **Variables** – These are optional, and give GTM access to additional information it might need to complete what you've asked it to do. For example, "Use UA-12345678-1 as the Google Analytics property ID."

Google Analytics has a great overview of Google Tag Manager here.

The Implementation Plan

Enough chatting about what these tools are. Let's dive in and have some fun!

You'll want to start with coming up with an implementation plan. Fortunately, Google has a good explainer video here to help you get started.

An implementation plan will help you think through the entire process. Once complete, you'll have a good idea of all the initial steps you'll be taking to setup GA (Google Analytics) and verify it's working properly.

The Build Out

Ready to start?

Follow these three steps…

1. Google Analytics "Account" created (normally by the client, but you can create this as well).
2. Google Analytics "Property" settings customized (this is where you'll link other Google services like AdWords).
3. Google Analytics "View" customized (so you can get deeper insights than a "stock" Google Analytics setup would allow) .

Let's dive into each one…

Step One: Account Setup

In almost all cases, your clients will already have a Google Analytics account and you'll only need them to add you as a user. If they don't yet have an account, then you'll create an account and add them yourself. Here's how to do both.

If your client is already using Google Tag Manager, have them add you as a user or create an account yourself and add them as a user by following the instructions here.

Special note: If you are not going to use Google Tag Manager, you will be at a disadvantage. Do whatever you can to convince your clients to use GTM. If you don't, you won't have as much direct control over the implementation of the Google Analytics setup and will instead, have to rely upon your client's developer. (And who wants to do that?!?)

Once the account is setup, the next step is to get GA reporting Pageviews. There are two ways to do that.

1. Traditional

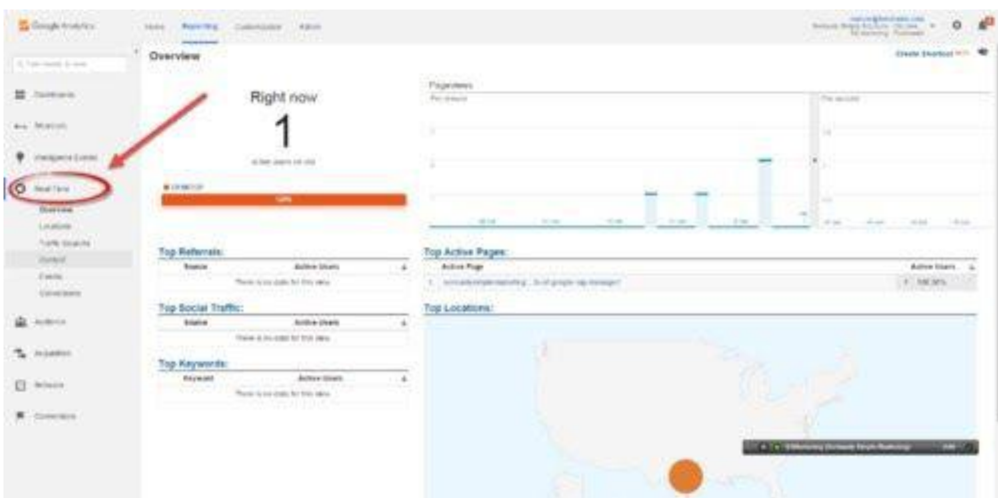
- Copy and paste the GA tracking code on your client's site (or have their developer do it).

2. Google Tag Manager – RECOMMENDED!

- Install the GTM script on your client's site (or have their developer do it) and then setup the Pageview tag by following the instructions here.

Next up, verify the basic "Pageview" tracking is up and running.

This is where the "Real-Time" reports in GA come in handy. You can find them here:



Seriously Simple Tips:

1. If you're optimizing a high traffic site, it's helpful to filter the Real-Time reports so they just report on your location. When you're on the site, select Real-Time>Locations and you should see your own city showing up. Select that and the rest of the Real-Time reports will be segmented to just show traffic from your city. As an alternative, you can also use UTM tags to accomplish the same thing… more on these later.

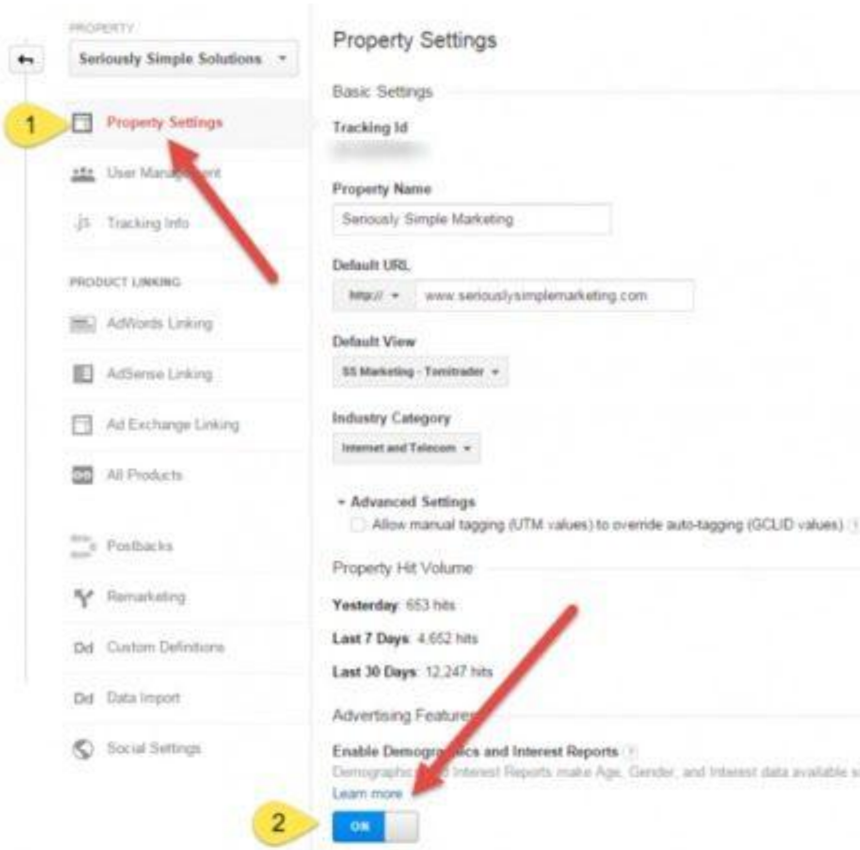
2. If you aren't seeing the URLs report as expected, be sure to check that:

- The Google Analytics code is on the page (normally you can "right-click" and select "View Source" then search for "UA-" to find the GA code).
- The Google Tag Manager code is on the page and the Pageview tag is setup correctly.

Step Two: Property Setup

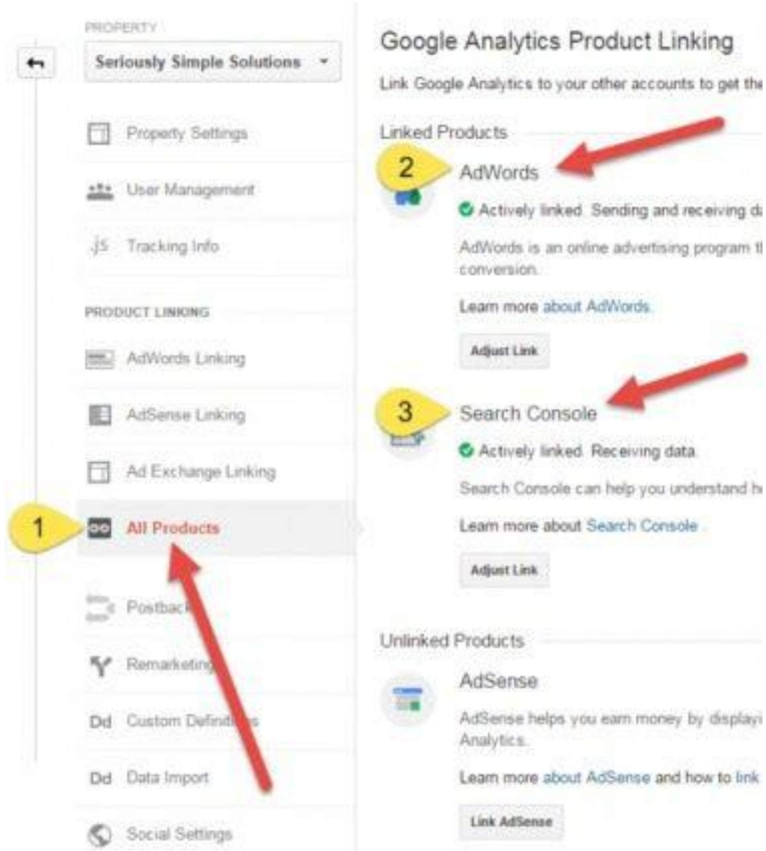
With the account setup and the basic Pageview information reporting, you'll want to move on to the Property setup.

First, turn on Demographic reporting. Here's how you do that…



Be sure to verify your client's privacy policy has been updated so that it follows these guidelines that Google requires.

Once that’s done, you’ll want to verify that any other Google accounts you or your client have access to, have been linked. Of these, the most popular *(and useful)* will be Google AdWords and Search Console (so you can get access to valuable SEO data).



Here’s how to link AdWords to Google Analytics.

Here’s how to link Search Console.

If your client uses other Google services that can be linked, I’d suggest you link them too.

Data is your friend and every linked account will give Google Analytics data that it wouldn’t otherwise have access to.

WARNING: Whenever you link accounts, like AdWords, Google Analytics will ask you which “Views” you want to link them to. As you add Views, which we’ll talk about next, you’ll need to go back and make sure you link them to the Google services you need.

Step Three: View Setup

Views are where the magic starts…

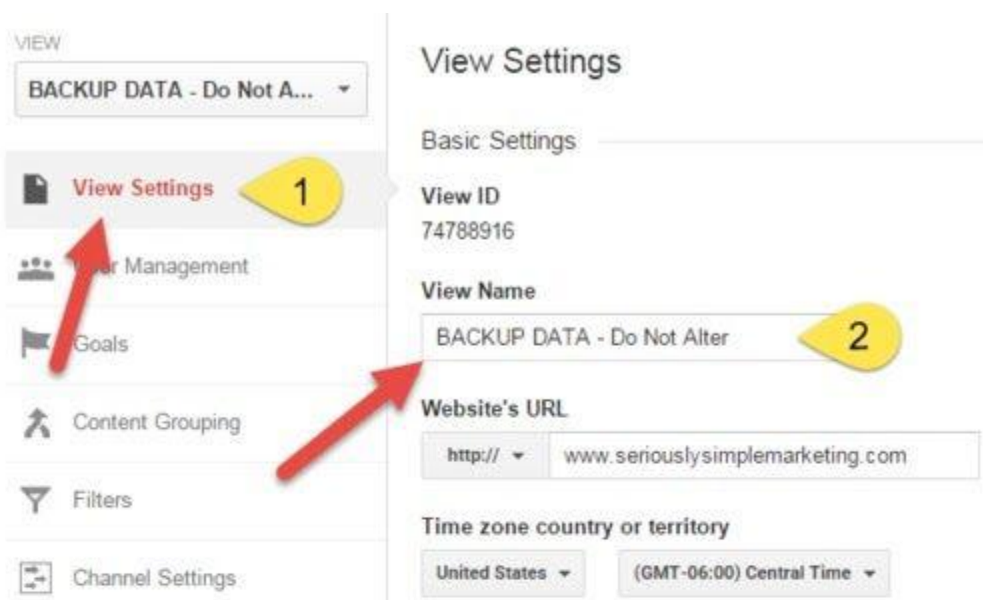
Among other things, each “View” in GA has its own Goals and its own Filters.

This allows you to *customize* the data you see in the Google Analytics reports (which I’ll show you how to do).

Before you do any of that however, you should always make sure there is a BACKUP View. In our company we refer to this as the “Virgin View”. (You’ll see why soon…)

When you first setup a new GA Property, it’ll automatically create a default View named “All Website Data”. (Most setups we come across often ONLY have this View setup and haven’t taken the time to setup any others.)

If this “All Website Data” View has ZERO Goals or Filters associated to it, you’re fairly safe to just rename this View to something like “Backup Data – DO NOT ALTER”.



Why are we doing this?

Because we're about to unlock some pretty cool features of Google Analytics!

Not the least of which is something called *Filters*.

As you read earlier, Filters (and Goals) are associated with the View they were created in. One other interesting tidbit about Filters…

Filters permanently alter the data in the View. Once you Filter out something, it's gone forever and there's no way to get it back.

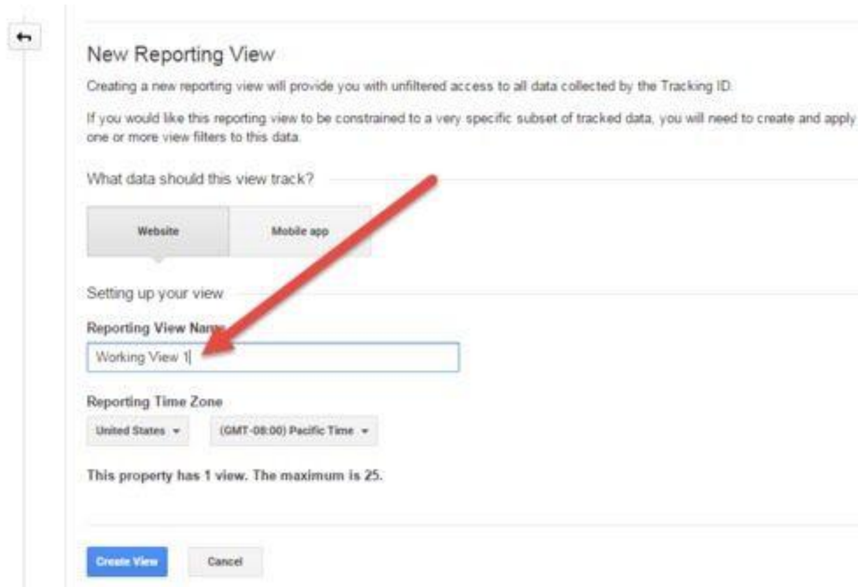
If you have a backup View, one that doesn't have those Filters on it, the data in that View remains "untouched" (hence our nickname, the "Virgin View").

That's why you have a backup. It's for that "just in case" scenario. You'll still lose the data in the View that had the Filter setup, but at least you'll have a backup View to flip to and (hopefully) find what you need.

Once you've created your backup View, it's time to create a new View and set it up properly.

Once you've created this View you'll want to setup a few things, starting with the name. We normally start with "Working View 1" as a name and change it later if needed.

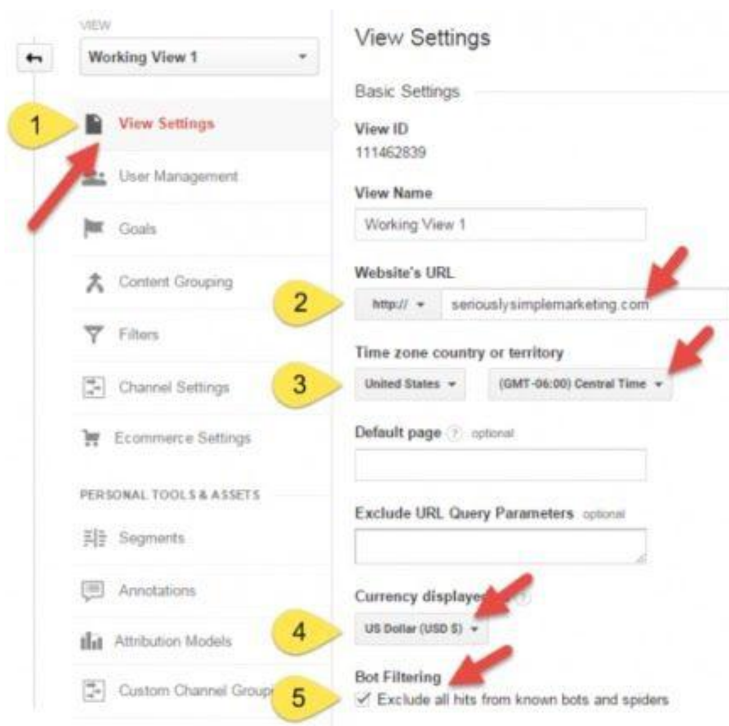
(Note: We'll be assuming you're setting up GA for a website here.)



Once you've named your View, you'll want to setup the basics.

These include:

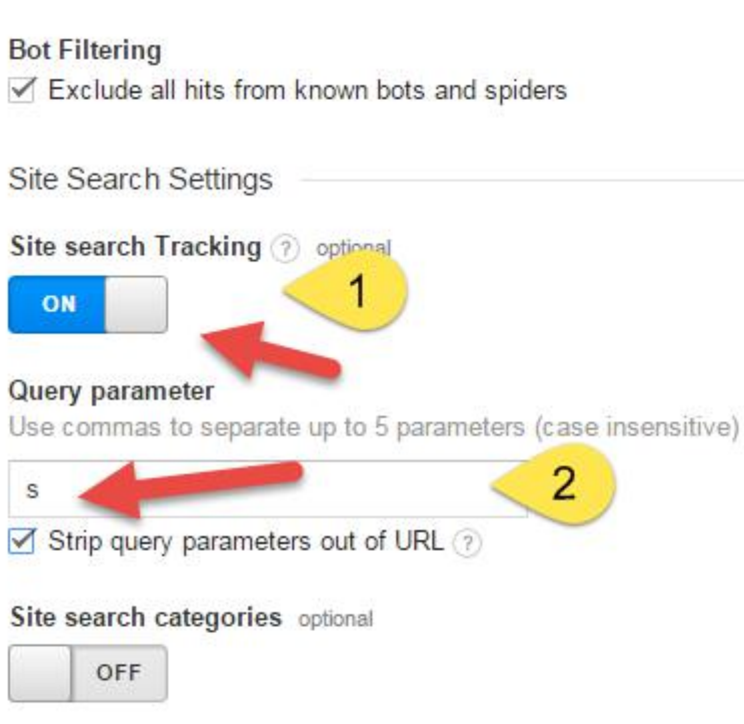
- Timezone
- Site URL
- Bot Filtering



Bot Filtering is optional, but in most cases I recommend checking this box so that Google begins to filter out any known "bots and spiders" from showing up in your data. Remember, if for whatever reason, this setting altered your data in a negative way, it would ONLY affect this particular View. (See why it's important to setup that backup?)

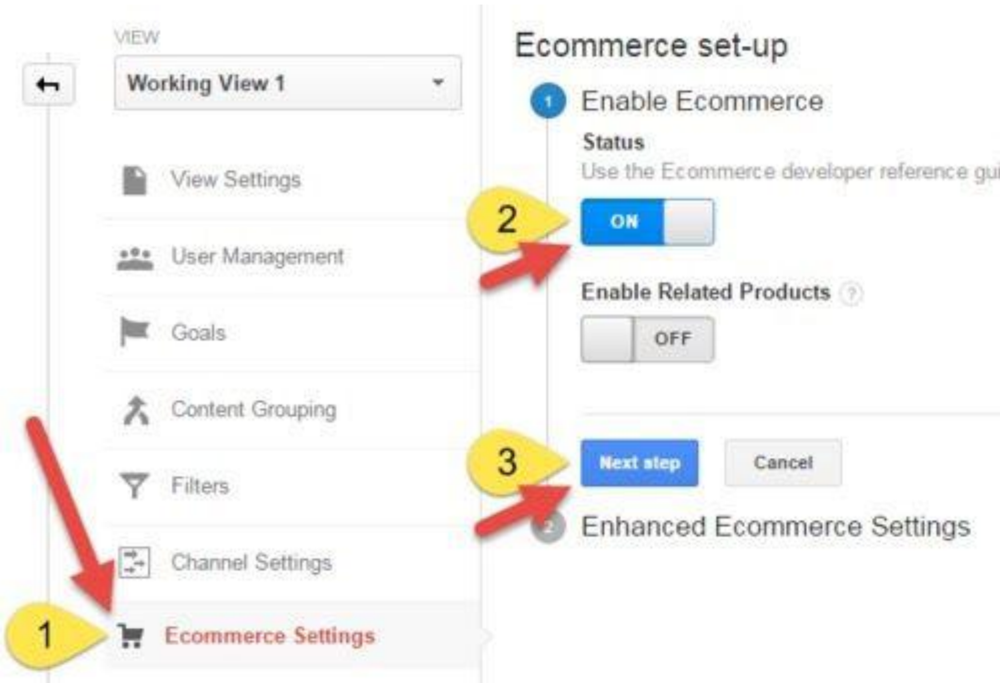
If the site you are optimizing has an "on-site" search bar, it's a great idea to enable that in the View as well. Once you do this, GA will "listen" for those searches and will report back to you what it finds. It's a great way to figure out what the site visitors are looking for!

Here's an example of how to setup a typical WordPress site…

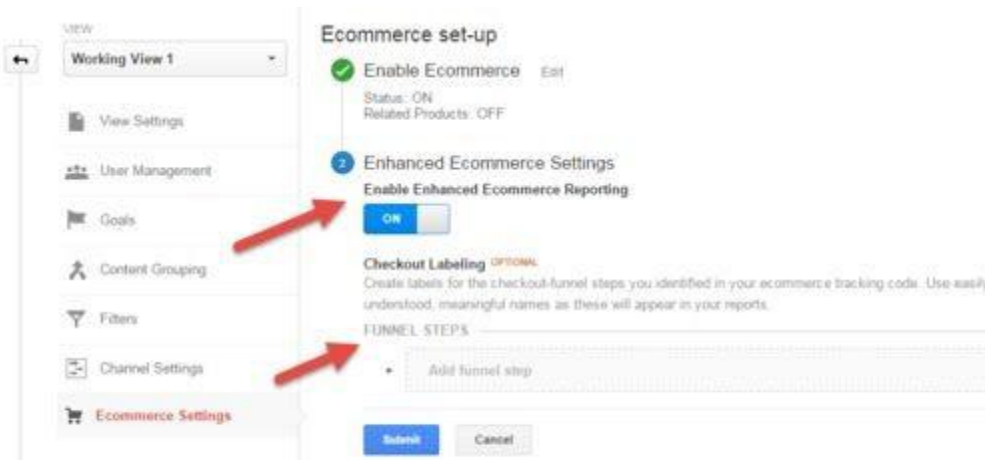


You'll notice in this example I added "s" as a query parameter. That's because in almost all WordPress sites, "s" is the parameter that is used to denote a search. If the site you are working on doesn't use "s" you'll want to enter the parameter it does use.

With the basics setup, it's time to turn on Ecommerce (assuming your client will be passing Ecommerce data through) to GA.



You may also find "Enhanced Ecommerce" reports useful too. If you do want those, you'll need to activate them after you've enabled the initial Ecommerce here…



Keep in mind, turning on the reports is only a step. In order to actually see the transaction data in Google Analytics, you'll need to make sure that data is being reported correctly.

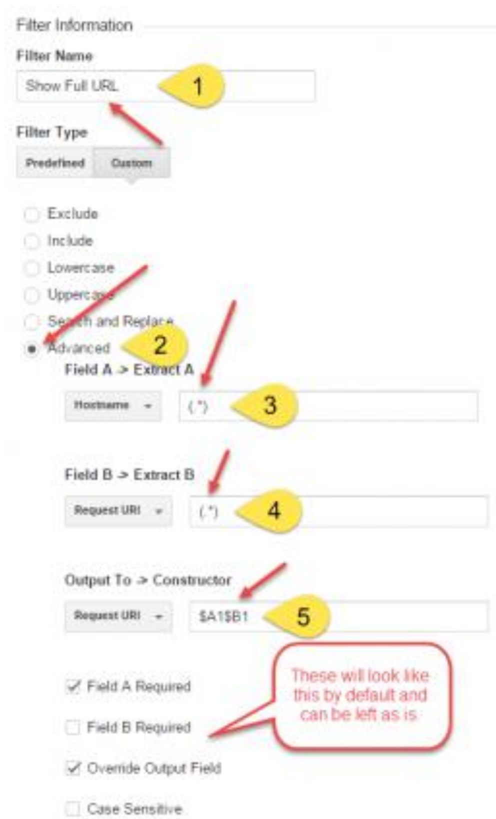
Whether you are using the recommended Google Tag Manager implementation or just the GA code, this will help give you some guidance.

Next up… Filters.

These can be a little complicated, so I'll be brief here.

First, not every View will have Filters. With most of our Views though, we setup a Filter that shows the full URL in the Google Analytics report (so instead of just "/" showing for a homepage, it'll show "homepage.com/" instead).

Here's what that Filter looks like:



This particular Filter is useful not only because it allows you to see the entire URL, but it's also necessary to set up Cross-Domain Tracking (more on this feature later).

It's a little beyond the scope of this course, but you can also setup Filters that will filter out traffic from certain IP Addresses or even certain traffic sources (which can come in handy to get rid of spam bots that make it through to your site).

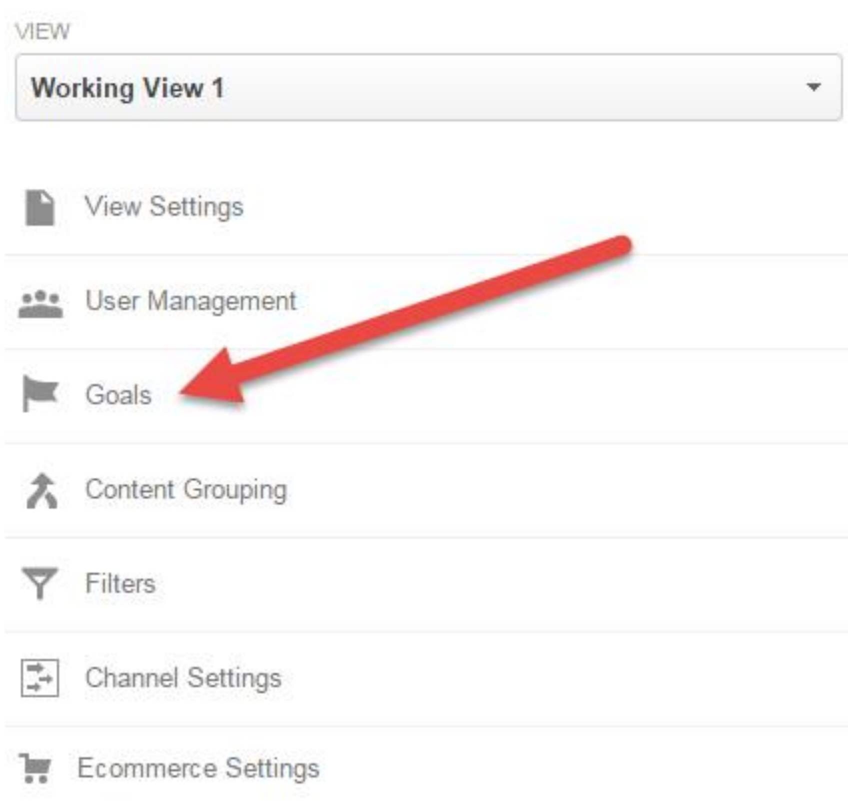
Seriously Simple Tip:

Remember, Filters permanently alter the data of the View they are setup under. If you are in doubt as to the Filter you're about to setup, create a copy of the View you're working on and test it out first.

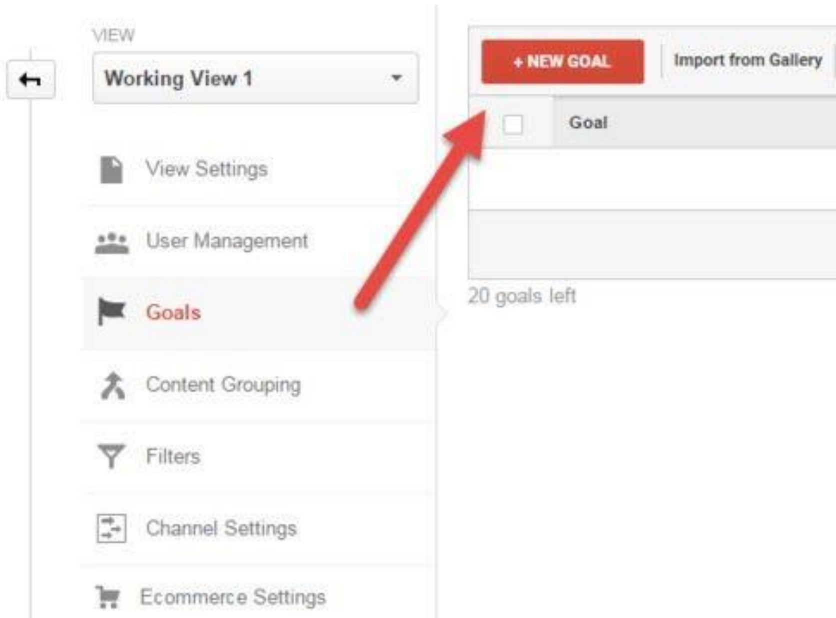
Before we leave the "View" settings, let's take care of one more topic…

How to Setup Goals in Google Analytics

You'll find the Goal setup here:

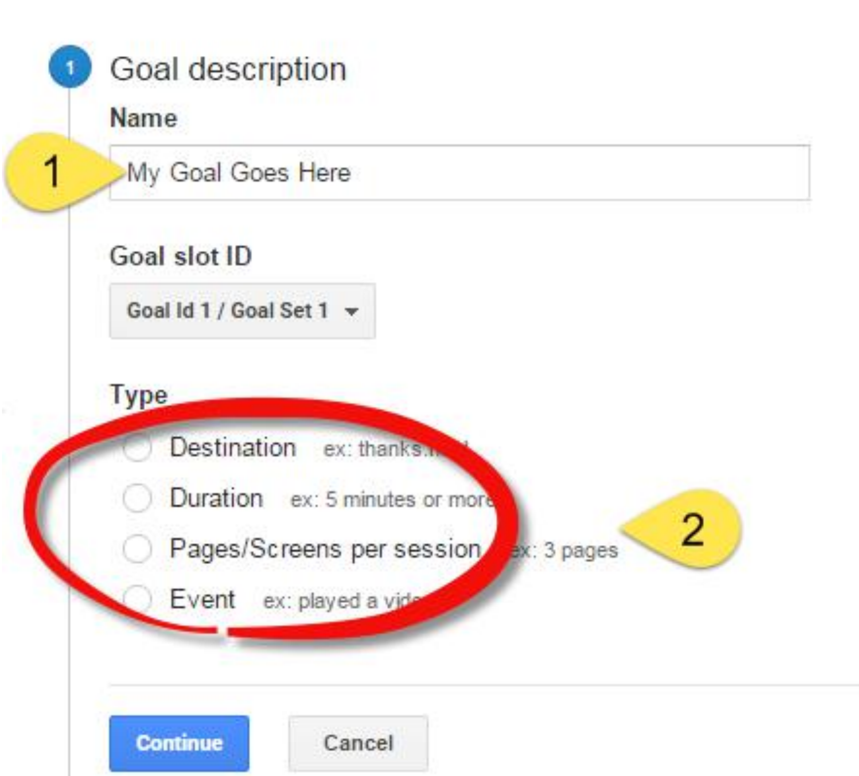


Once in the setup, click "New Goal"…



You'll be taken to a screen where you can create a name for your Goal (you can change this, by the way) and you'll have a chance to designate which type of Goal you want to create.

As you see, there are four unique types…



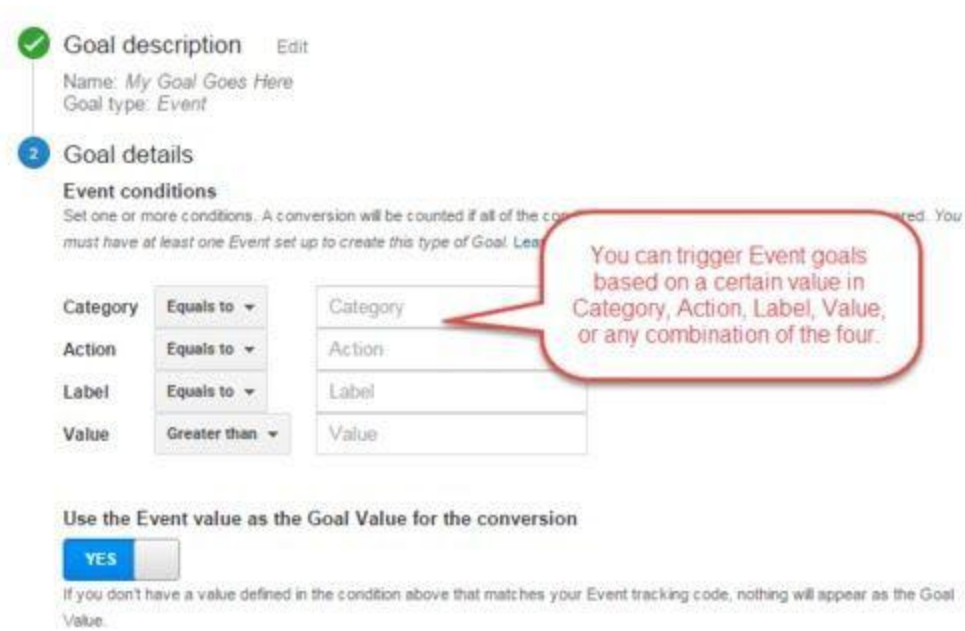
Destination – You'll use this fairly often. It's perfect for whenever you need a Goal to trigger whenever a certain URL (or URL fragment) is loaded in the browser. It also allows you to build "funnels" that you can track in the Funnel Visualization report. Here's a great place to get some specifics on Destination Goals and how to setup funnel tracking.

Duration – These are Goals based on the time someone spends on your site and when combined with advanced segmentation, can measure how engaged a visitor is with your site.

Pages Per Session – Another Goal you can use to measure engagement. This one fires whenever anyone surpasses a certain number of pages in a single session.

And finally, my (and soon to be your) favorite Goal type:

Event – In my humble opinion, these are the most useful of all the types because they are the most flexible. They are triggered whenever a certain condition (or combination of conditions) is met. Anything from the click of a mouse on a specific button to a certain action taking place, like when a visitor requests to live chat.



Event Goals do require a bit of setup. First, you'll need to determine which *specific* action you want to track. For example, the click of a purchase button.

There are two ways to do this. The hard way, which requires a developer to custom code the action like this.

And the easy way, using Google Tag Manager.

The Power Team

Google Tag Manager and Google Analytics were literally made for one another. There's no better demonstration of this, then when you are setting up Events and Event Goals.

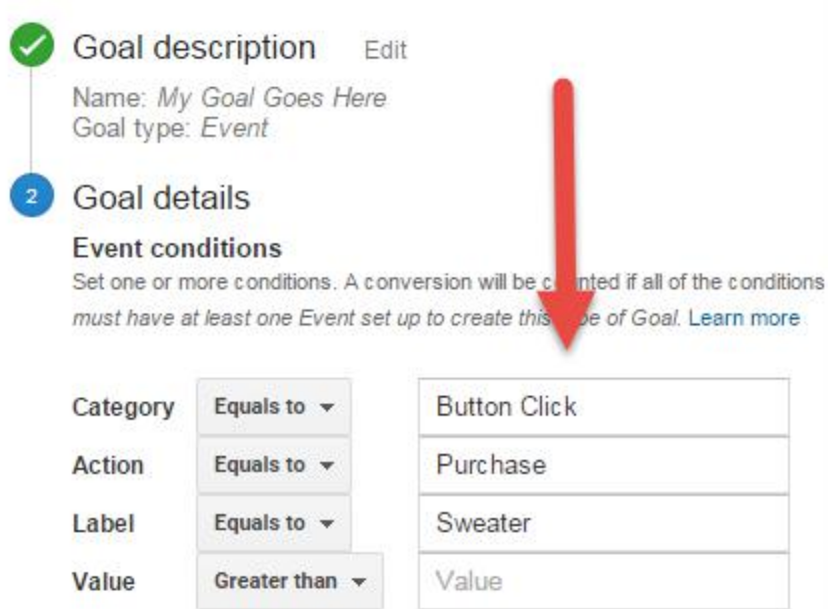
The first step is to setup an Event tag that fires the specific Category, Action, Label, and/or Value. In my own experience, we rarely use the Value field (instead we set up Ecommerce to get monetary data points).

While it does take a little practice, once you get the hang of it, using Google Tag Manager to fire Events to Google Analytics becomes a breeze.

Want to see how it's done? Check this out… It's a great step-by-step.

Once you have confirmed the Events are correctly reporting to Google Analytics (you'll do this using the Real-Time>Events report) all you have to do is create a Goal that fires when the specific Event comes through.

For example, if you create an Event that fires a Category of "Button Click" and an Action of "Purchase" with a Label of "Sweater" (and you want to track that with a Goal), here's how you'll set that up:

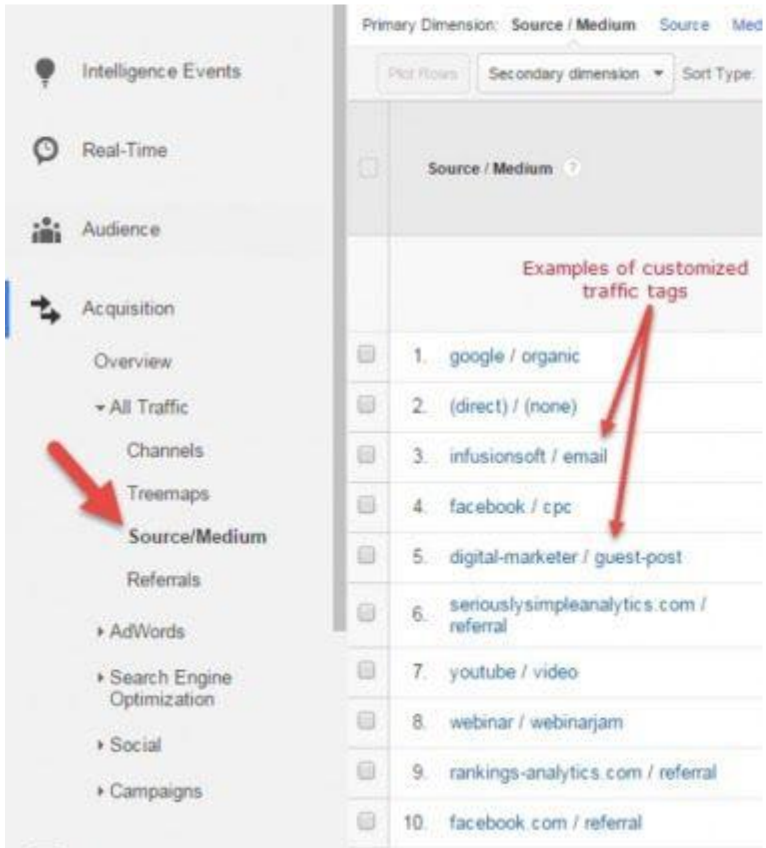


Now that you've got your Goals in place, you've got your basic View all set!

There's one more major thing you'll want to check on…

Tracking Traffic

Check out this report under Acquisition>All Traffic>Source/Medium:



You'll see that we have a number of *customized traffic sources* reporting here. We're doing that using UTM tagging.

You'll want to be sure you give your clients resources like this so they know how to tag their own traffic. The better quality tagging they do here, the better quality data you'll have to optimize from.

Seriously Simple Tip:

UTM tags should only be used to tag *EXTERNAL* sources of traffic. Traffic sources like Facebook, email, AdWords, etc. You wouldn't want to use UTM tags on any link that's already on your site, only external links that lead to your site.

Some Parting Words…

If you take action and follow the steps in this seriously simple email, you'll know more than most!

Before we part ways, let's chat about one final detail…

It's called "Cross-Domain Tracking" and it could come into play if your client's site has multiple domains as part of their funnel or "buyer's journey". In these cases, you'll absolutely want to setup Cross-Domain Tracking.

I know what you're thinking… "How do I do that?"

If you're using the traditional Google Analytics (boring) try doing this.

If you're using Google Tag Manager (you should be) it's faster to do this.

Remember, whether it's Google Tag Manager or Google Analytics, it's normal to have lots of questions.

When you do, feel free to find me at SeriouslySimpleMarketing.com and I'll be happy to offer assistance.

In addition, you'll want to keep a few resources handy:

1. Google Analytics Group on LinkedIn
2. Google's Analytics Academy (Free training!)

Now that you know a thing or two about properly setting up your analytics, you'll know that your data is providing a *useful* truth and can count on it to help guide your optimization efforts.

Takeaways

1. Use additional analytics, outside of conversion tools like VWO and Optimizely, to segment your data and double check results.
2. Make Google Tag Manager your new best friend to simplify and speed up the management of tags, triggers and variables. No IT department required!
3. Using the step-by-step instructions in this email, setup your Views, Filters and Goals in a way that captures a *useful* truth, not convenient pieces of the truth.

For more from Chris, check out MeasurementMarketing.io

How to Use Analytics to Find Insights by Yehoshua Coren

At a recent SMX Conference, I was asked by the panel moderator (Barry Schwartz), “What is the biggest mistake you notice people making when it comes to their analytics?” After considering the question for a moment, the answer became very clear to me.

People feel overwhelmed by a mountain of data and they don’t know where to start to find insights. “What should I be looking for in my analytics?”, they ask.

My response to Barry was that the first place people should start when it comes to analytics is with business questions. Your analytics data is there for you to learn about your site’s users and their behavior.

Asking a business question and then turning to your analytics for insights will consistently lead you to more success than just clicking around reports, waiting for something to pop out at you.

With that said, I’m going to give you a few tips for finding insights in your data. Spoiler alert: The rest of this email lesson is mainly going to be about segmentation.

BUT DON’T STOP READING NOW!

It’s really not as boring as you may think! In order to answer any reasonable business question you can come up with, you’ll need to “slice and dice” your data to get at the insights. Once you’re familiar with the process of slicing and dicing, I think you’ll find it quite fun. (And it’ll make you $$$.)

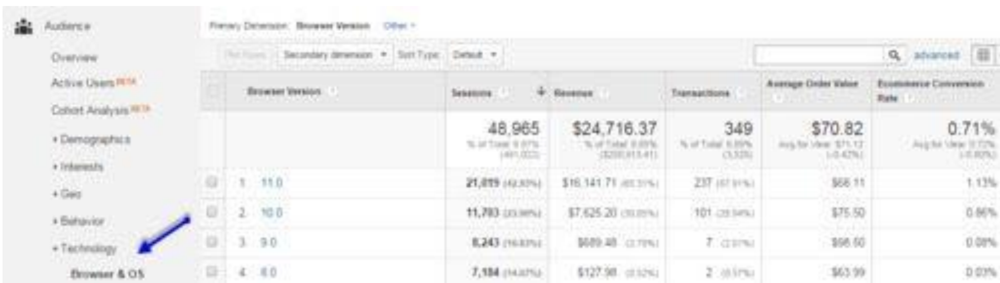
Technology

- Objective → Improve user experience (and conversion).
- Question → Are there any indications that user experience differs significantly by device type or browser type?
- Action → Fix technical issues that are hurting user experience.

Let’s start with an example that I oftentimes find has a lot of low hanging fruit → technology.

Cross browser testing, while vitally important, is time-consuming and not every dev team is super diligent about making sure their website works well across different browsers. Let’s be frank: If your site is broken on a certain browser, those people aren’t going to convert.

A starting point to get at this data is to use Standard Reports. Audience > Technology > Browser & OS.

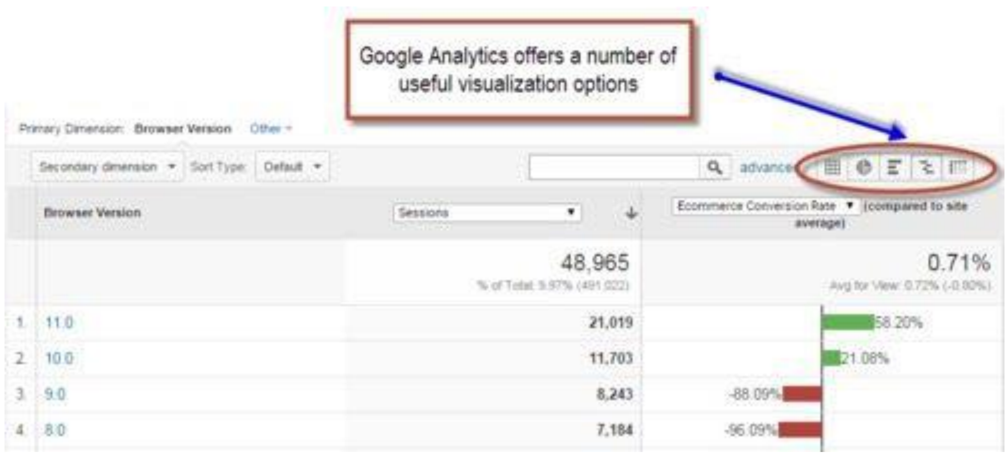


Generally speaking, you will be able to find insights in your data faster and more effectively if you have some way to visualize the data better than the tabular reports in GA.

Exporting your data to Excel or Google Sheets and applying some conditional formatting will make it much easier to find insights.

Browser	Sum of ecommRate	Sum of visits
Chrome	0.83%	22139
Internet Explorer	0.63%	9879
Safari	0.94%	7623
Firefox	1.00%	5399
Grand Total	0.83%	45040

Similarly, using the “comparison” visualization in GA’s reports will help your data “pop out at you”.

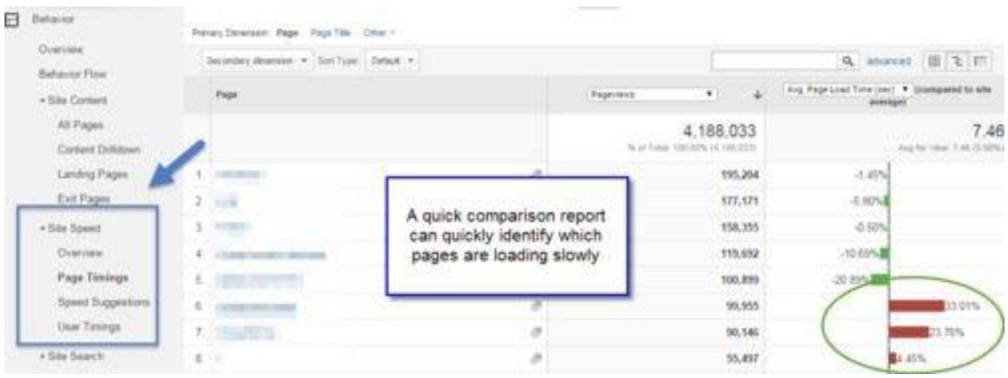


In the above example, we see that Internet Explorer 8 and 9 are way off when it comes to conversion rate, and the amount of traffic to the site from those browsers is not insignificant (context!).

In this particular use case, running some cross browser testing on these browsers (the action item) led us to immediately find (and fix) a technical issue that was impeding sales.

Page Load Speed

- Objective → Improve user experience (and conversion).
- Question → Are there pages that are loading slowly that I should pay attention to?
- Action → Get IT to improve page load performance.



Another technical issue that can greatly impact user experience (and conversion) is page load speed.

Google Analytics has some good data on how long it takes your pages to load. Although it is not an enterprise-class page speed analysis tool, you'll be able to approach IT with a list of priorities, which pages to work on and how to tackle the problems.

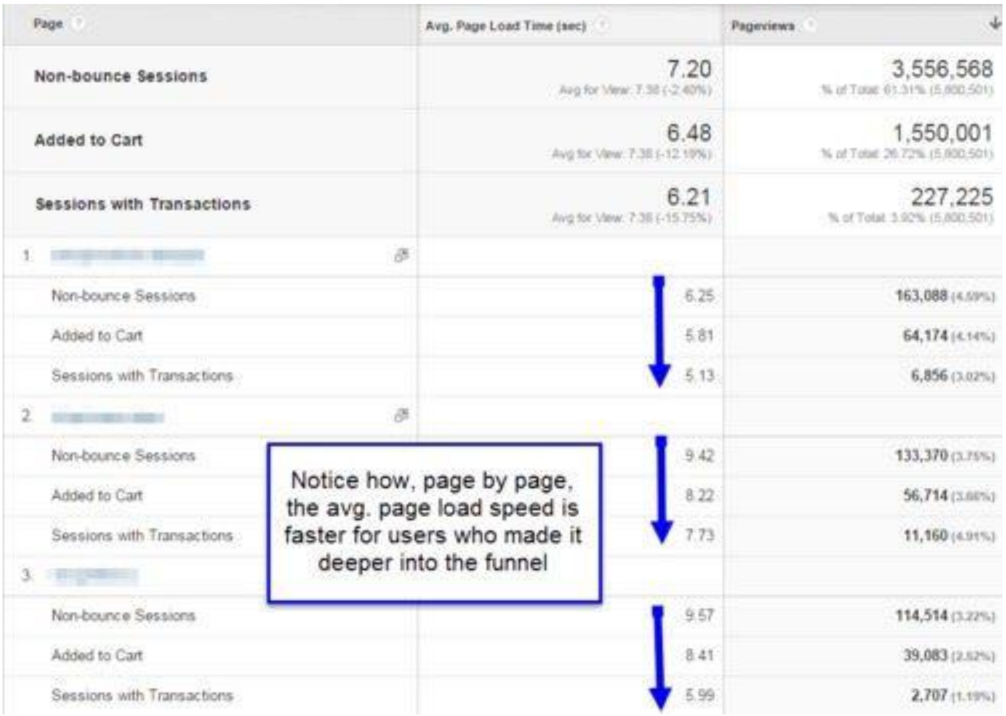
IT can then use professional development tools to effectively tackle the problems.

If you want to make a quick argument to the decision-makers at your company that page load speed really does have a business impact, just compare the "Bounce Sessions" and "Non-Bounce Sessions".

It should be quickly apparent that users who come to the site and leave are having a poor experience because the site is slow. That is leaving money on the table due to technical issues.

Page	Avg. Page Load Time (sec)	Pageviews	Bounce Rate
Bounced Sessions	13.44 Avg for View: 7.25 (85.39%)	162,447 % of Total: 5.80% (2,802,155)	100.00% Avg for View: 30.65% (226.24%)
Non-bounce Sessions	6.88 Avg for View: 7.25 (-5.11%)	2,633,676 % of Total: 93.99% (2,802,155)	0.00% Avg for View: 30.65% (-100.00%)

Or compare the page load speed of users who made it through different stages of your conversion funnel.

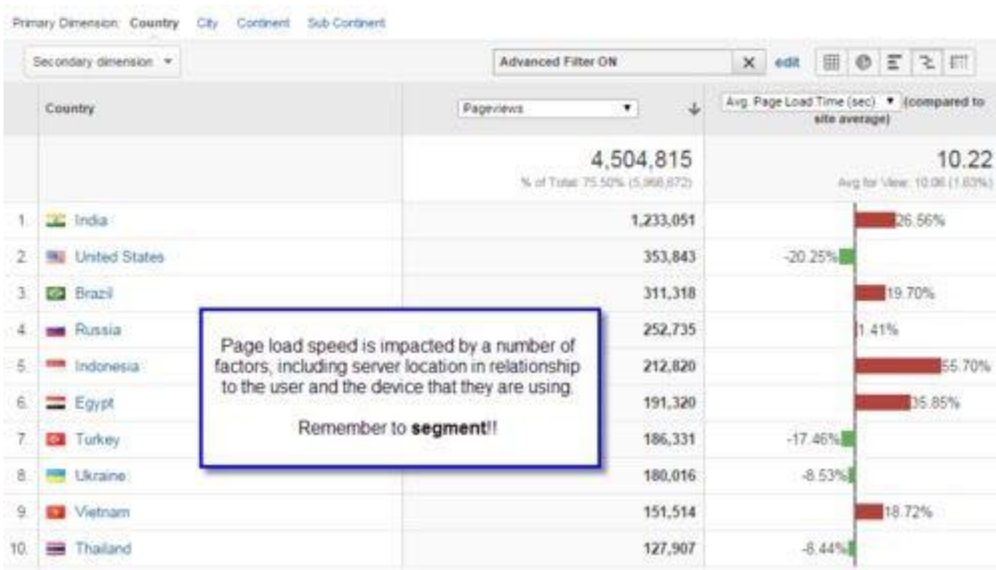


Page	Avg. Page Load Time (sec)	Pageviews
Non-bounce Sessions	7.20 Avg for View: 7.38 (-2.40%)	3,556,568 % of Total: 61.31% (5,800,501)
Added to Cart	6.48 Avg for View: 7.38 (-12.19%)	1,550,001 % of Total: 26.72% (5,800,501)
Sessions with Transactions	6.21 Avg for View: 7.38 (-15.75%)	227,225 % of Total: 3.92% (5,800,501)
1.		
Non-bounce Sessions	6.25	163,088 (4.59%)
Added to Cart	5.81	64,174 (4.14%)
Sessions with Transactions	5.13	6,856 (3.02%)
2.		
Non-bounce Sessions	9.42	133,370 (3.75%)
Added to Cart	8.22	56,714 (3.66%)
Sessions with Transactions	7.73	11,160 (4.91%)
3.		
Non-bounce Sessions	9.57	114,514 (3.22%)
Added to Cart	8.41	39,083 (2.52%)
Sessions with Transactions	5.99	2,707 (1.19%)

I've run this sort of report across dozens of different sites and the results are all very similar. The takeaway is that page load speed makes a difference to the business and now it is time to improve it.

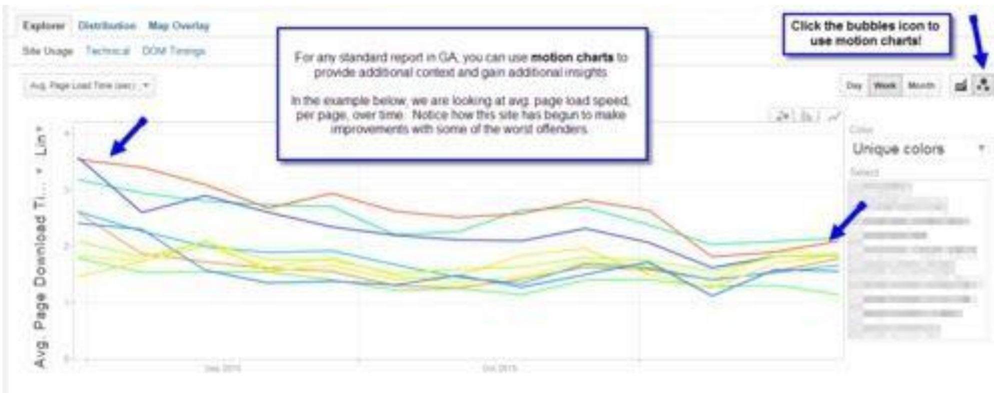
Pro Tip: Use on-the-fly segmentation in your analytics tool often. In the above example, we're simply comparing sessions where the user did not interact with the site vs. sessions where there was an interaction. The data makes a decently strong argument that page load speed impacts whether or not users stay or leave.

There are a number of different factors that can impact the loading of a page, including: device type, browser type, and the user's location in relation to the web server. Applying segmentation to your site speed data will allow you to both identify the right pages to work on and in what context.



A core functionality of analytics tools is their reporting on the impact of changes you make to your site. While our current use case is page load speed, this can be applied to any area of optimization.

You’ll want to know what is working, what is not working and how that changes over time. Within our current context, I’ll introduce you to one of my favorite tools in Google Analytics → Motion Charts.



Motion Charts are a great way to spot anomalies in your data as well as see how your data points change over time.

In the above example, page load optimization efforts can be seen on a per page basis. (It is simply a stacked line chart where you can easily isolate an individual page and see general trends over many pages.)

If you were to select a bubble chart, which allows to you apply additional metrics to the graph based upon bubble size and color, you could also correlate this with a “page value” metric as well.

Time of Day / Day of Week

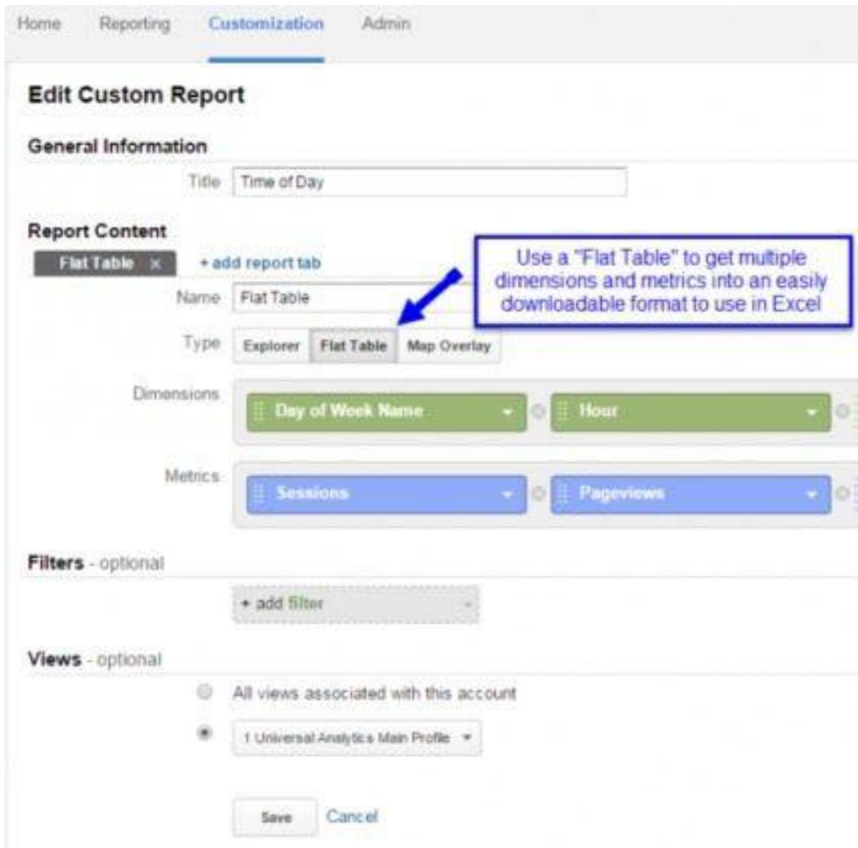
- Objective → Make the biggest impact from marketing efforts.
- Question(s) → Are there optimal times to send out your email newsletter? What times of day should you boost CPC in paid search? Are there best times to post to social media?
- Action → Deliver your marketing messages at the ideal time.

Google Analytics can help you determine how your site performs at different times of the day and on different days of the week. In order to access this data, you are going to need to create a custom report and export your data into Excel.

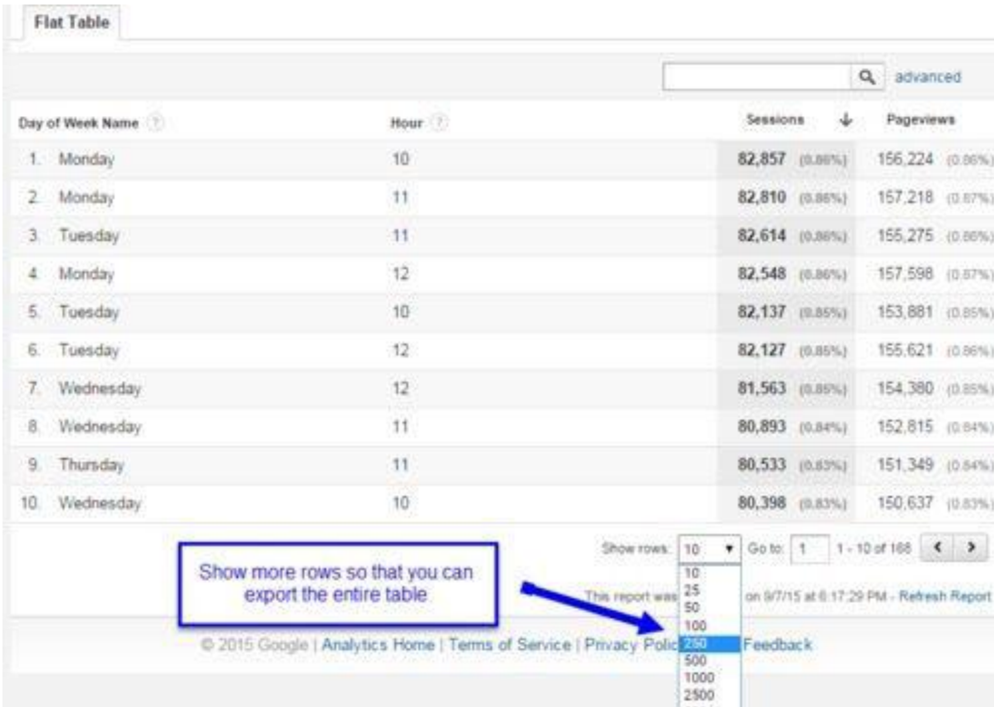
You can download a copy of the report here.

If you were to create a report yourself, you would first create a custom report and choose Flat Table. Your dimensions will be Day of Week Name and Hour.

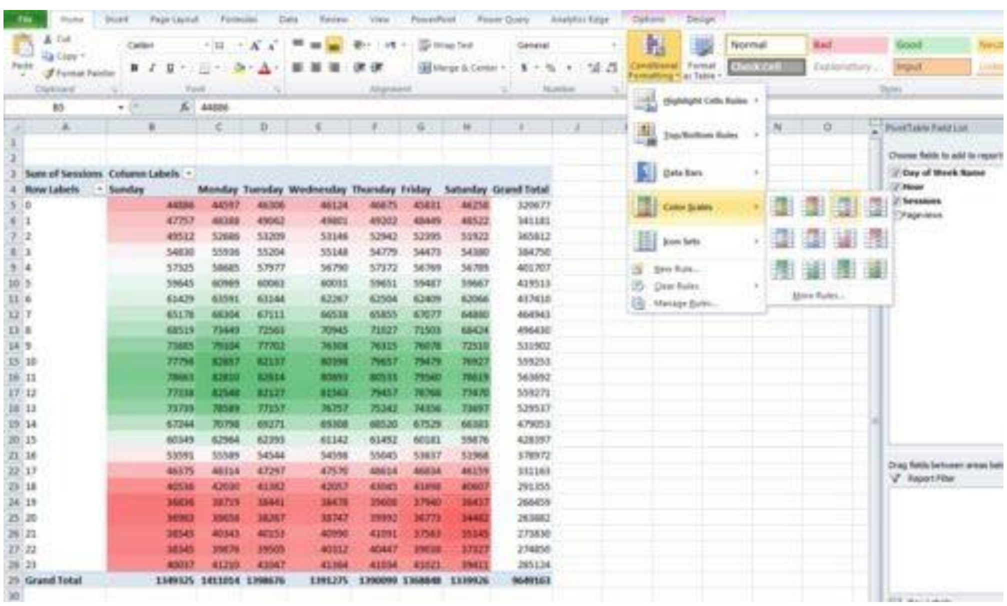
Now, add metrics such as Sessions, Pageviews and Conversion Rate (for goals or ecommerce).



In order to download all the rows of the report, you will need to "Show Rows" at the bottom of the table. Then export to Excel.



Once you have your data in Excel, you'll need to create a pivot table. Apply some conditional formatting and VOILA! An awesome heatmap of your Google Analytics data.



Pro Tip: Add Channel or Source/Medium to your dimensions in the flat table to be able to segment your traffic volume and conversion rate by traffic source.

Conversion Funnels

- Objective → Increase the number of conversions.
- Question → Where are users dropping out of my funnel?
- Actions → Improve conversion funnel flow & “smart” remarketing to get the right message to the potential customer at the right time.

A key area you should be looking at to find insights is your conversion funnel. The conversion funnel describes a set of steps that the user must progress through in order to complete a desired action on your site.

For a B2B lead gen site, it could be something as simple as seeing a contact form to submitting that form. For ecommerce sites, it is usually the checkout process from adding an item to cart to purchase.

While this email lesson is not focused on the setup of your analytics as much it is about finding insights, I do want to note that if you aren’t collecting *useful* data you aren’t going to be able to find many insights.

With regards to conversion analysis, that means that you must have goals and funnels properly configured.

By setting discrete goals / metrics in your analytics tool for each stage in the funnel, you’ll be able to easily segment your funnel by any dimension. This was coined by John

Henson as using “horizontal funnels”. The idea is to look for dropoff points in the funnel; these are the areas to focus on.

My friend Peter O’Neill wrote a recent post where he discusses how configuring calculated metrics can really help provide insights about where to take action. In his words:

“Knowing that your Conversion Rate is lower for segment X vs segment Y is not that valuable. Knowing that two dimension values behave exactly the same except for one stage in the funnel pinpoints where you have to take action.”

The thing I like about analysis using horizontal funnels is that you are able to segment your funnel using custom reports by any number of useful dimensions. In the above image, we’re segmenting the funnel by Channel.

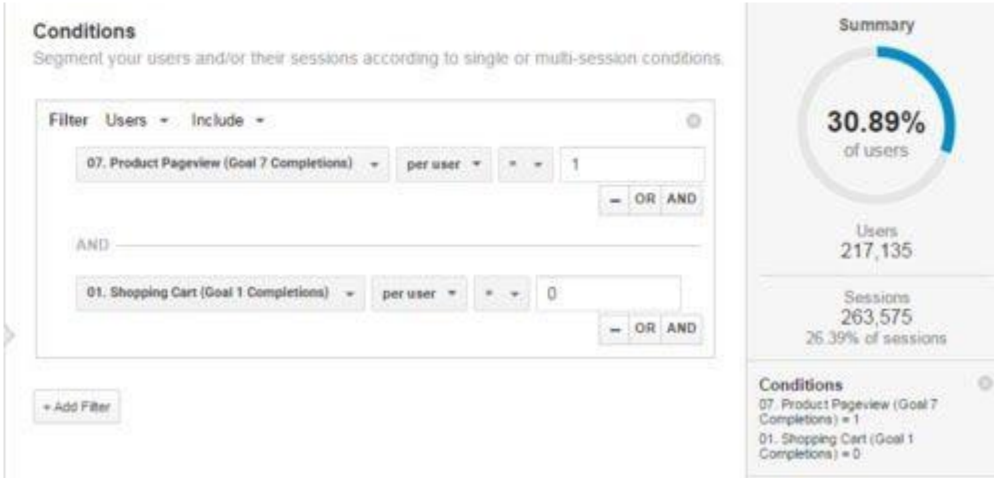
However, your report can be configured to analyze:

- Landing Page Type
- A/B Test Variation
- New vs. Returning Users
- Geo-Location
- Device Type
- Browser Type
- Etc.

Another approach to finding insights in your conversion funnel is to create segments for users who dropped off somewhere in the process. Some ecommerce examples include:

- Viewed product, but did not add to cart.
- Added to cart, but did not begin checkout.
- Began checkout, but did not purchase .

The conditional logic for creating these segments is fairly straightforward.



Once you create your segment, you then proceed to explore (yup, more segmentation). Which traffic sources did these users came from? What landing pages did they arrive on? What products were they looking at? What were their geographic locations?

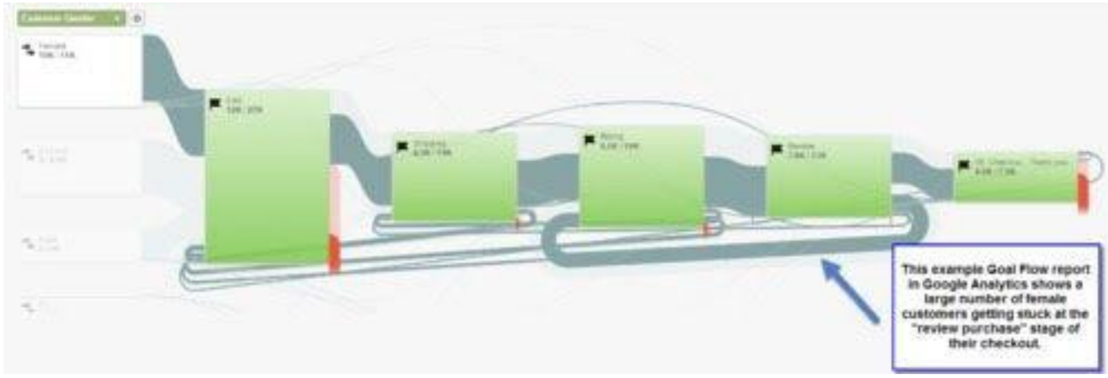
One particularly powerful function that I love about Google Analytics is the ability to take any of these segments and add it directly to an Ads Remarketing List (which works both for display and remarketing lists for search).

As you segment (and micro-segment) your traffic, you will be able to build smart audience lists so that you can get the right message to your potential customers at the right time.

So instead of just spamming the Internet with display ads to all of the people who have visited your site, you can show relevant messaging to users based upon where they were in their customer journey. (And ensure you don't alienate your acquired customers by continuing to show them your ads.)

Conversion funnel analysis is great for discovering areas of the funnel that need fixing (often technical / motivational).

In the image below, notice how users are bouncing back from the "review order" page (they've already entered their credit card number!) to the billing page.



It is worth noting that quantitative analytics tools (like Google Analytics or Adobe Analytics) will only be able to model user behavior (what they're doing), but will not be able to tell you "why" users behave in a certain fashion.

For that, you'll need qualitative tools such as surveys or session recordings. As such, analytics tools are of great value to help guide exactly where / how to deploy the qualitative tool.

One exception to the above rule regarding analytics tools is with regards to error tracking. If you're tracking error messages on your site, you can get a pretty good idea as to "why" users are dropping out of your funnel.

Event Action	Total Events
Tracking Site Errors	20,268 % of Total: 0.45% (4,528,443)
1. Coupon code is not valid.	7,341 (36.22%)
2. This product is currently out of stock.	5,473 (27.00%)
3. Invalid login or password.	3,801 (18.75%)
4. The requested quantity for is not available.	1,776 (8.76%)
5. Some of the products are currently out of stock.	494 (2.44%)
6. Unable to initialize Express Checkout.	277 (1.37%)

Summary

Digital media allows us to measure user behavior in an unprecedented way. The impact of marketing efforts, UX decisions, landing pages and A/B testing variations can be measured with great precision.

Finding insights in your analytics data ultimately requires you to segment your data as, quoting Avinash Kaushik, "all data in aggregate is crap".

In order to provide you with some direction as to where to start, I recommended looking at:

- Device and Browser Type
- Page Load Speed
- Day Parting
- Conversion Funnels

As part of exploring those different areas, I shared some important techniques for how to go about finding insights. These revolved around:

1. Data Visualization

- Exporting data to a spreadsheet and applying conditional formatting.
- Using comparison toggles in your analytics tool.
- Using Motion Charts (for Google Analytics).

2. Using your tool's ad hoc segmentation capability.

- Bounce vs. Non-Bounce Sessions.
- Users who complete discrete actions on your site.
- Users who drop out of your conversion funnel.

Analytics is both the way that you will measure the success (or failure) of your efforts online as well as a treasure trove of information that will inform your business decisions.

If you have any questions or would like to learn more, please feel free to reach out to me via email (ninja@analytics-ninja.com) or on Twitter (@analyticsninja).

Takeaways

1. When looking for insights, start with a few core objectives and a list of business questions. Don't expect insights to pop out at you.
2. Export your Google Analytics data to Excel. You can easily create heatmaps and otherwise visualize your data to discover insights you might've missed in a tabular report.
3. Conversion funnels are high value. You'll be able to spot changes in behavior as visitors move through the funnels, which will show you exactly where to focus your optimization efforts.

For more from Yehoshua, check out Analytics Ninja.

How to Gather Qualitative Data for Insights by Jen Havice

Digging into your Google Analytics. Teasing apart quantifiable data.

When it comes to optimizing your website and landing pages, there's nothing quite like being able to look at numbers. They help answer questions about what is or isn't working, where problems are cropping up, and how much traffic a page is leaking.

Except, quantitative research can only take you so far. You need to understand the **why** behind the what, where, and how much in order to make changes your visitors will find meaningful.

Qualitative research does exactly that.

Find Out What Makes Your Customers Tick

Whenever you create copy for your site, determine the layout for a page, or the graphics to go along with it, your first concern should be how you can help your customers achieve their goals.

Why?

Because if your visitors get exactly what they need to move from Point A to Point Z – and everywhere in between – they're a whole lot more likely to become customers.

The only way to do that is by understanding what drives their decision making process. Things like their:

- Biggest pain points and reasons for seeking out your product/solution.
- Motivations, wants, and desires .
- State of awareness of your solution .
- Concerns, doubts, and hesitations .

Which means you'll need to ask real, live human beings questions to get the kind of information that's worth analyzing.

How Do You Get Inside Your Customers' Heads?

There are several ways you can go about gathering qualitative data to make the most of your optimization efforts:

- **Online surveys sent via email** – Ideally, these are sent to recent customers within the last 6 months so the buying experience is still fresh in their minds.
- **Onsite surveys (otherwise known as exit/intent surveys)** – Even with one question popping up at the right time on the right page, you can get valuable information about why a visitor is leaving your site, has chosen not to buy, or can't find something.
- **Personal interviews** – Talking to prospects as well as current and past customers can help you dive deeper into how they feel about your product or service.
- **User testing** – Watching people navigate your site while asking them to tackle particular tasks can show you why bottlenecks are occurring.
- **Customer support logs and live chats** – Mine these to gain insights into what questions your customers are asking and what problems they might be having.

For an in depth discussion of the various tools you can use for qualitative research along with how they each work, check out The Advanced Guide to Qualitative Research on the CXL blog.

Before You Start, Know What You Want Your Research to Accomplish

Whether you're conducting interviews or asking your customers or prospects to take part in a survey, the most important place to start is with the goal you're attempting to achieve.

Seems basic but it's worth spelling out.

Let's say you're developing a new sales page for an existing product. You know where you'll be driving traffic to get to the page but you could use some insights into how your customers perceive its value.

In this case, you'd focus your questions around how and why your customers seek out a solution such as yours. Knowing the words they use to describe the "how" and "why" can help you better reflect back to their reasons for seeking you out in the first place.

Getting Actionable Insights Means Asking the Right Questions

Once you've established your goal, your next step involves asking questions that will yield the best results. Here are some guidelines to help you do just that.

1. Keep the Number of Questions to a Minimum

Most people have a limited amount of time and patience – along with goodwill. So, keep an online survey in the range of 6 to 10 questions. You'll want your website pop up surveys to be even shorter, 1 to 2 questions max.

You can glean quite a bit of valuable information even from a small number of questions. Keep the survey short, to the point, and…

2. Relevance Is Key

Make sure your questions are relevant to the task at hand. This brings us back to knowing what your goal is. Refrain from asking questions just because you'd like to know the answers. If they're not going to serve your direct purposes – leave them out.

3. Focus on Open Ended Questions

When you're interested in finding out the language your customers use, you need access to their actual words. This means asking questions that require more than a yes or no. You want them to express themselves as openly as possible.

Allowing them to merely tick a box will only give you so much, so keep yes/no and multiple choice questions to a minimum.

4. Bias Will Get You Nowhere

Repeat after me, "No leading questions." Don't do things like include superlatives in your questions. Asking what your respondents think about your bright and cheery website design plants an idea in their heads about the site.

Stay as neutral as possible in your wording to generate the most reliable answers.

5. As Steve Krug Says, "Don't Make People Think!"

Just like good design and usability on a site, good questions should be easy to understand. If they're vague or overly complicated, chances are you won't get the answers you're looking for.

For instance, I made the mistake of asking on a recent survey the question, "What types of online copywriting frustrate you the most?"

This question confused people. Without including the words "to write" at the end of the sentence, they seemed to think I was asking them about what types of pages are the most frustrating to read.

Needless to say, the answers did little to help in my research process.

What to Do Next

Qualitative research is all about helping you understand why people are taking certain actions (or not) on your site. Think of it as the yin to quantitative research's yang. Both need to work in tandem so you can come up with hypotheses worth testing.

To gather your qualitative data you'll want to:

- Determine the goal of your research so you tailor your questions accordingly.
- Choose the way or ways to conduct your research that will help you achieve that goal, i.e. online surveys, interviews, etc.
- Go through the above guidelines to help ensure your questions generate the most reliable answers.

Then, dive in and start talking to your customers. You might just be surprised by what you learn.

Takeaways

1. To find out why people are leaving your site, use on-site surveys on key pages to ask 1-3 questions (e.g. “What is the purpose of your visit today?” or “Were you able to complete your task today?” or “What prevented you from completing your task today?”).
2. To find out why people buy from you, email a survey to customers who have purchased from you in the last 6 months. Ask high impact questions (e.g. “What are you using [product] for?” or “How is your life better thanks to [product]?”).
3. To find out why bottlenecks occur, try user testing. You will be able to watch how real people interact with your site, uncovering UX issues and unknown points of friction.

For more from Jen, check out Make Mention Media.

What to Test (Conversion Research) by Michael Aagaard

“It is difficult to solve a problem you don’t understand.”

I think most of us agree to the logic behind that statement.

Well, the exact same logic applies to conversion optimization.

And that’s why research is so important.

It helps you understand your conversion problems – where they are and what’s causing them.

Having this insight makes everything in your CRO process fall into place. It provides you with a foundation for making informed decisions and prioritizing your optimization opportunities according to effort and potential return.

A/B Testing Is NOT an Excuse to Skip Your Homework

If you want to establish an effective A/B testing program that actually moves the needle, you’ll have to do your homework – there’s simply no way around it. Here’s why:

Testing unqualified ideas is pure guesswork. You’re basically just pitting two guesses against each other in the hopes that one will have an impact. At some point, you’ll probably chance upon something that works, but you’ll also have wasted a lot of time and money along the way.

Simply trying stuff to see what happens is fun, but not a good optimization strategy. It is much more constructive than that.

Doing research upfront to qualify your ideas before you start testing will help you build stronger hypotheses, and vastly increase the quality of your tests as well as the impact they have on your business. Moreover, it’ll save you a lot of time and frustration in the long run.

Start With *Where* and *What*, Then Move on to *Why*

I start my research process by going through quantitative data from Google Analytics with the goal of finding out *what's* going wrong and *where* it's going wrong.

Initially, I dig into general data to get a high-level idea of how the website is performing as well as how much traffic and how many conversions the website gets.

These insights help me get a general idea of what we're dealing with and what optimization strategy we need to adopt. When you have actual numbers on users/sessions and conversions, you can quickly do a few basic calculations to figure out what your testing capacity is.

You might not have enough traffic to do any meaningful testing, in which case you need to adjust your CRO strategy.

You might have just enough traffic to run tests that yield massive lifts, in which case you need to focus on radical and pervasive changes.

You might have lots of traffic and conversions, in which case you can actually experiment with everything – small changes to radical redesigns – and get meaningful data within a reasonable timeframe (2-4 weeks).

Evan Miller has a great sample size calculator that you can play around with to get an impression of how big a sample you need in order to detect a given lift.

Online Dialogue has a similar calculator that lets you calculate how big of a lift you need to be able to conclude a test within a given timeframe based on your traffic and current conversion rate.

Once I have this initial data in place, I go through general stuff like device mix, browsers, bounce rates, top landing pages, top exit pages, etc. This gives me an overall idea of how users are interacting with the website. Also it helps me identify glaring issues like browser compatibility.

With the where and what questions in place, I start collecting qualitative data with the purpose of answering the *why* questions (e.g. Why are users bouncing like crazy on the main product landing page?)

I usually kick this process off by interviewing the folks in customer support and sales. It's amazing how much insight they can provide you with.

These guys spend all day talking to customers and have in-depth knowledge of the problems and issues that they are dealing with – both in relation to the website and the product itself. Moreover, they are familiar with the decision-making process of the target audience and can help you build better optimization hypotheses.

Here are the 5 questions I ask during these interviews:

1. What are the top 3 questions you get from potential customers?
2. What do you answer when you get these questions?
3. Are there any particular aspects of the product/offer that people understand?
4. What aspects of the product/offer do people like the most/least?
5. Did I miss anything important? Got something to add?

After that, I hone in on specific sections/pages on the website to get more information. Session recordings are great for funnel analysis. Scroll/Heat maps are really good for getting an idea of how users interact with individual pages. Form analytics are fantastic for understanding which parts of the form facilitate friction or even abandonment.

Feedback polls are a really amazing way to get answers to specific questions. I try to keep these polls as simple and non-intrusive as possible.

So, I normally stick to one question and 3-4 answers. If you go with open-ended questions, a little trick is to hide the comment field behind a radio button. In my experience, this boosts completion rates as it seems that presenting an open comment field off the bat scares people off.

When digging into value prop-related stuff, I like to ask, “What’s most important to you?” and present 3 different aspects of the product or service (e.g. “1. Saving money. 2. Saving time. 3. Getting high quality leads.”) Then you can add a fourth option, “Other”, and have that fold out as an open comment field in case there are other aspects you missed.

P.S. CXL has a great framework for collecting and prioritizing all your conversion research.

Takeaways

1. Gather your quantitative (what and where) and qualitative (why) data using the strategies you learned from Yehoshua Coren (quantitative) and Jen Havice (qualitative).
2. Determine whether A/B testing is right for you. If you don't have enough traffic, don't A/B test. If you have just enough, focus on testing radical changes. If you have lots, you can test small changes and still get meaningful data.
3. Using your research, hone in on the identified points of friction (what and where) and come up with a hypothesis based on the identified "why". Run your test! Repeat.

For more from Michael, check out M/A Consulting.

How to Run A/B Tests by Peep Laja

The last lesson was about *what* to test. Now we need to validate our hypotheses and learn. Pick a testing tool, and create treatments / alternative variations to test against the current page (control).

There's no shortage of testing tools, one is even built into Google Analytics and completely free. I use Optimizely and VWO the most, but there's also Qubit, Adobe Target, Convert.com, and many others.

A thing to keep in mind is that you want to take testing seriously. You either need the help of a developer or you need to learn some HTML, CSS, and JavaScript/jQuery.

You can only use the visual editor if you're making small changes, like tweaking the copy. For anything else, you're risking your test failing due to cross-browser and cross-device compatibility issues.

Testing is no joke – you *have* to test right. Bad testing is even worse than no testing at all because you might be confident that solutions A, B and C work well when in reality, they hurt your business.

Poor A/B testing methodologies are costing online retailers up to $13 billion a year in lost revenue, according to research from Qubit.   Don't take this lightly!

I *often* hear of businesses that run 100 tests over a year, yet their conversion rate is where it was when they began. Why? Because they did it wrong. Most of their tests were false positives or false negatives. Massive waste of time, money and human potential.

There are 3 things you *need* to pay attention to when deciding when your test is done…

1. You need to make sure your sample size is big enough.

In order to be confident that the results of your test are actually valid, you need to know how big of a sample size you need.

There are several calculators out there for this – like this or this.

You need a minimum number of observations for the right statistical power. Using the number you get from the sample size calculators as a ballpark is perfectly valid, but the test may not be as powerful as you had originally planned.

The only real danger is in stopping the test early after looking at preliminary results. There's no penalty to having a larger sample size (except that it takes more time).

As a very rough ballpark, I typically recommend ignoring your test results until you have at least 350 conversions per variation (definitely more if you want to look at the results across segments).

But don't make the mistake of thinking 350 is a magic number; it's not. This is science, not magic. Always calculate the needed sample size ahead of time!

Related Reading: Stopping A/B Tests: How Many Conversions Do I Need?

2. You need to test for multiple business cycles.

For some high-traffic sites, you would get the needed sample size in a day or two. But that is not a representative sample. It does not include a full business cycle, all weekdays, weekends, phases of the moon, traffic sources, your blog publishing and email newsletter schedule, and all other possible variables.

So for a valid test both conditions – an adequate sample size and a long enough period to account for all factors (a full business cycle or, better yet, two) – should be met. For most businesses, this is 2-4 weeks. Always run tests full weeks at a time (stop tests at the 7, 14, 21 or 28 day mark).

3. You need statistical significance.

When an A/B testing dashboard (i.e. Optimizely or a similar frequentist statistics tool) says there is a "95% chance of beating original", it's asking the following question: Assuming there is no underlying difference between A and B, how often will we see a difference like we do in the data just by chance?

The answer to that question is called the significance level, and "statistically significant results" mean that the significance level is low (e.g. 5% or 1%). Dashboards usually take the complement of this (e.g. 95% or 99%) and report it as a "chance of beating the original" or something like that.

If the results are not statistically significant, the results might be caused by random factors and there's no relationship between the changes you made and the test results (this called the null hypothesis).

But don't confuse statistical significance with validity. Once your testing tool says you've achieved 95% statistical significance (or higher), that doesn't mean anything if you don't have a big enough sample size. Achieving significance is *not* a test stopping rule. Read this blog post to learn why. It's very, very important.

Consider this: One thousand A/A tests (two identical pages tested against each other) were run.

- 771 experiments out of 1,000 reached 90% significance at some point.
- 531 experiments out of 1,000 reached 95% significance at some point.

Quote from the experimenter:

"This means if you've run 1,000 experiments and didn't control for repeat testing error in any way, a rate of successful positive experiments up to 25% might be explained by a false positive rate. But you'll see a temporary significant effect in around half of your experiments"

So if you stop your test as soon as you see significance, there's a 50% chance it's a complete fluke. A coin toss. Totally kills the idea of testing in the first place.

Always make sure that when you end your test, you have:

- a big enough sample size (pre-calculated).
- a long enough test duration (~2 business cycles).
- statistical significance (95% or higher).

Until the first 2 criteria are matched, the statistical significance means little.

Run Separate Tests for Your Desktop and Mobile Segments

While running A/B tests on all your traffic at once might seem like a good idea (to get a bigger sample size faster), in reality, it's not. You need to target mobile and desktop audiences separately. (Note: You can combine tablet with desktop.)

Here are 5 reasons why:

1. Different things work. What works for mobile might not work for desktop (and vice versa) .
2. Your desktop and mobile traffic volumes are different. So while your desktop segment might have a big enough sample size, you can't stop the test because the mobile segment needs more samples .
3. Not all mobile traffic is equal. People on different devices / mobile operating systems behave differently .
4. You might want to optimize for different outcomes (e.g. purchases for desktop, but email captures for mobile) .
5. You can create more tests faster. If you create tests targeting only a single device category, it will take less development and quality assurance time per test, hence you're able to launch tests faster.

Read more about this here.

What If I Have a Low Traffic Website?

Many sites have low traffic and a low total monthly transaction count. So in order to call a test within 4 weeks (you shouldn't run tests longer than than, or you get sample pollution), you need a big lift.

If you have bigger wins (e.g. +50%), you can definitely get by with smaller sample sizes. But it would be naive to think that smaller sites can somehow get bigger wins more easily than large sites can. Everyone wants big wins. So saying "I'm going to swing big" is quite meaningless.

The only true tidbit here is that in order to get a more radical lift, you also need to test a more radical change. You can't expect a large win when you just change the call to action. Conduct conversion research, identify problems and issues with your website, and test all those changes at once. Your chances of a higher lift go up.

Also, keep in mind: Testing is not a must-have, mandatory component of optimization. You can also improve without testing.

No Substitute for Experience

Start running tests now.

There's quite a bit to know about all this, but the content above will make you smarter than most about running tests.

Takeaways

1. Calculate your sample size before you begin testing. Don't stop your test until that sample size is reached and it's been at least one full business cycle, but preferably two.
2. You want to achieve at least 95% significance, but once you see significance has been reached, you can't just stop your test. Leave it running until the conditions above are met.
3. Segment your traffic. Test desktop / tablet traffic separate from mobile traffic to account for variations in volume, intent, compatibility, etc.

How to Create a CRO Process by Peep Laja

Let's say you get fired from your job.

But – good news – you've just been given a new job as a conversion optimization specialist at an eCommerce company. Your job is to increase the conversion rate and revenue per visitor of your employer's website by 30%.

How would you do it?

Seriously – take 20 seconds to imagine how would you go about optimizing a website you've never worked on before.

Your answer will tell me *everything* about your optimization know-how.

If you start by mentioning tactics – "I'd make XYZ bigger" and "I'd change this and that" – I will instantly know that you're an amateur. Because amateurs focus on tactics while the pros follow processes.

Maybe you have a list of 100 "proven" tactics. So where would you start? Implement them all at once? Then your website would look like a Christmas tree. Some tactics might work, some will not. They might cancel each other out or even make things worse.

Test the tactics one by one? An average A/B test takes approx. 4 weeks to run, so it would take you 7.5 years to test them all one by one. Nobody has that kind of time to make an impact.

If you had a good process to follow, you'd **know** which of the 100 tactics to try and which to ignore. You'd **know** where the problems are and what the problems are.

Conversion optimization – when done right – is a systematic, repeatable, teachable process.

Structured Approach to CRO

The success of your testing program is a sum of these two: the number of tests run (volume) and the percentage of tests that provide a win.

Those two add up to indicate execution velocity. Add average sample size and impact per successful experiment, and you get an idea of total business impact.

So in a nutshell, this is how you succeed:

1. Run as many tests as possible at all times (every day without a test running on a page is regret by default).
2. Win as many tests as possible.
3. Have as high of an impact (uplift) per successful test as possible.

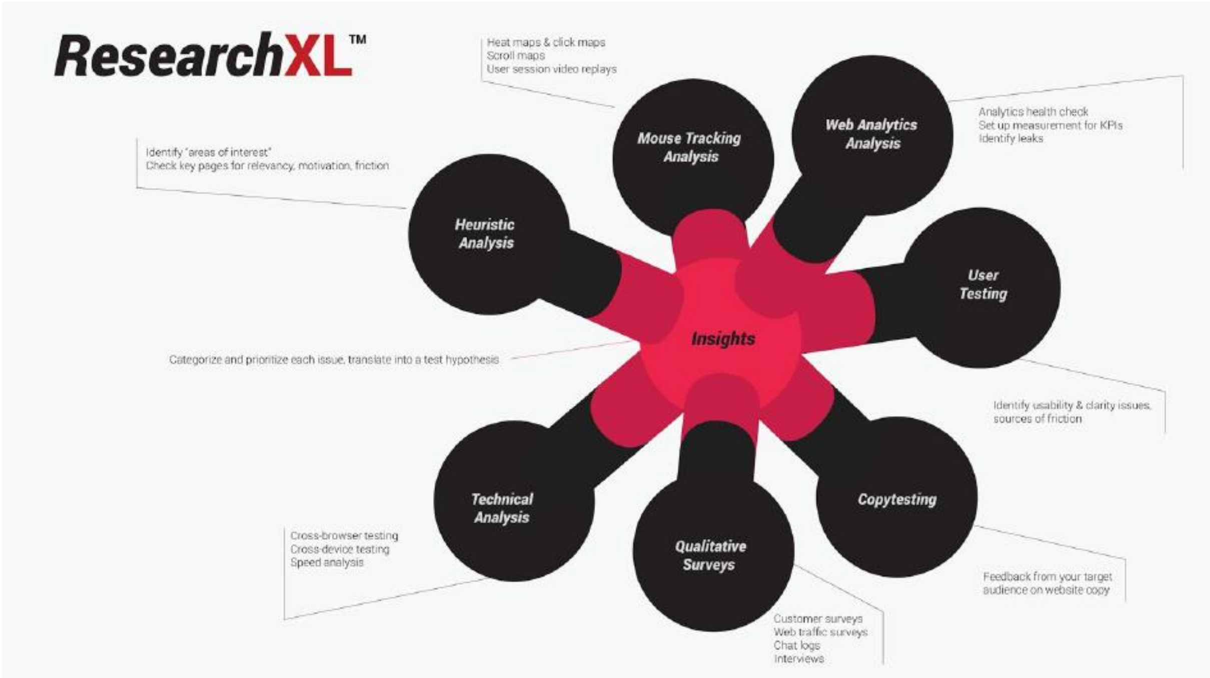
Executing point #1 is obvious, but what about points #2 and #3? This comes down to the most important thing about conversion optimization – **the discovery of what matters**.

Here’s a framework for this.

ResearchXL™ Framework

ResearchXL is a framework for identifying problems or issues your website has, and turning those into hypotheses that you can test.

You can use this framework for each and every optimization project. It’s industry-agnostic. The process you use to get higher conversions is exactly the same across all websites.



1. Technical Testing

If you think your site works perfectly on every browser version and every device, you're probably wrong.

Open up your Google Analytics and go to Audience -> Technology -> Browser & OS Report.

Drill down to a specific browser version (e.g. IE8, IE9) and see if a particular browser converts less than others. If so, fire up that browser and go figure out what's up.

Besides browser testing, site speed can be low-hanging fruit for optimization.

To find site speed data, log into Google Analytics and from there, go to: Behavior → Site Speed → Page Timings. Turn on the "comparison" to easily spot slower pages.

Look at the top traffic pages (because they affect the most people) and use a tool like Yslow or Google Pagespeed Insights (accessible via Google Analytics) to get a diagnostic on your site. Enter all the URLs of slow pages and these tools will find the issues for you.

2. Analyzing Digital Analytics Data

In a nutshell, we want to learn:

- What people are doing.
- The impact and performance of every feature, widget, page, etc.
- Where the site is leaking money.

Start with an analytics health check. This is just a series of analytics and instrumentation checks that answer some of these questions:

- "Does it collect what we need?"
- "Can we trust this data?"
- "Where are the holes?"
- "Is there anything that can be fixed?"
- "What reports should be avoided?"

The big point here is that, in order to collect the right data, everything needs to be set up correctly and you have to have the skills to set up the right reports.

3. Polling Website Visitors

For qualitative research, I like to start out with polling tools.

Generally there are two versions of visitor surveys:

- Exit Surveys – Hit them with a popup when they're about to leave your site.
- On-Page Surveys – Ask them to fill out a survey as they're on a specific page.

Here's what the visitor survey process will entail:

- Configure which pages to have the survey on.
- Write your own questions (no pre-written template bullshit).
- Determine the criteria for when to show the survey.

That's it. And don't worry too much about whether or not the surveys are annoying people. The insights you'll gain are worth it.

4. Surveying Existing Customers

Customer surveys are slightly different than on-page surveys, solely due to the fact that you're getting answers from current customers. Problem is, most people are seriously messing up their customer surveys.

So to summarize a complex process, here are the basics on how to do customer surveys for CRO:

- **Send an email survey to recent, first-time buyers.** If you send an email to people from too long ago, they'll have forgotten about you or why they purchased. They'll give you totally irrelevant data.
- **Then try to get 100-200 responses.** More than that and the answers will get repetitive. Any less than 100, though, and you might not be able to draw substantial conclusions.
- **The quality of the questions is the most important factor.** Don't ask yes/no questions, avoid multiple choice, etc.

5. Mouse Tracking and Session Recording

Mouse tracking is one of the lesser important spokes of the research process, but we can still gain some insights here.

Quickly, here are some of the different types of mouse tracking technologies (and related tools):

- **Mouse Movement Heat Maps** – A graphical representation of data where the individual values contained in a matrix are represented as colors. Red equals lots of action.
- **Click Maps** – Just as it sounds, click maps track where people click. The visuals make it easy to explain things to executives and other team members. Another good use for them is to identify if users are clicking on non-links.
- **Attention Maps** – A map of which areas of the page have been viewed the most by the user's browser with full consideration of the horizontal and vertical scrolling activity. This is especially illuminating for assessing the effectiveness of the above the fold area.

- **Scroll Maps** – This shows you scroll depth (how far down people scroll). Can be very useful for designing long sales pages and whatnot.
- **User Session Replays** – Many tools also offer the capability of recording video sessions. It's like user testing, but no script or audio. Plus they're actually using their own money.
- **Form Analytics** – These tools basically identify where users are dropping off, which fields draw hesitation, which fields draw the most error messages, etc.

6. User Testing

User testing lets you watch people use your site in real-time while they comment on the process. Ask testers to perform a specific task, a broad task and move through your entire funnel.

(Note: If you're debating on which tools to use, for any of these categories, check out our list of conversion optimization tools reviewed by experts.)

Putting It All Together

These six spokes of our ResearchXL framework should have given you sufficient insight and issues to work on. Now we've got to categorize them in a way that promotes efficiency.

We dump them into the following 5 buckets:

1. **Test.** This is the bucket for things with a big opportunity to shift behavior and increase conversions.
2. **Instrument.** We put things that need technical tweaking in this bucket (e.g. beefing up analytics reporting, fixing/adding/improving tags or events).
3. **Hypothesize.** We put things in this bucket that, while we know there is a problem, we don't see a clear solution. Then, we brainstorm hypotheses and, driven by data and evidence, create test plans.

4. **Just Do It.** No brainers go here. This is where a fix is easy to implement or so obvious that we just do it. Low effort or micro-opportunities to increase conversions right away.
5. **Investigate.** Things in this bucket require further digging.

Next, we prioritize the items in our bucket using a 1-5 star scoring system. (There are many ways to prioritize tasks, but this works well for us.) 1 = minor issue, 5 = critically important. The two most important things to consider when giving an item a number are:

- **Ease of Implementation** (e.g. time, complexity, risk).
- **Opportunity Score** (i.e. subjective opinion on how big of a lift you might get).

Then create a 7 column spreadsheet. It should look something like this:

Issue	Bucket	Location	Background	Action	Rating	Responsible
Google Analytics bounce info is wrong	Instrument	Every page	Google Analytics script is loaded twice! Line 207 and 506 of the home	Remove double entry	★★★★	Jack
Missing value proposition	Hypothesize	Home page	Give reasons to buy from you	Add a prominent value proposition	★★★	Jill

Beginners are often worried about what to test, which breeds listicles offering "101 Things to Test Right Now". Funnily enough, after doing conversion research, what to test is never a problem (usually, you've identified 50-150 issues).

Once you prioritize, you can begin writing and testing hypotheses. A good way to write your hypothesis is like this (credit to Craig Sullivan):

"We believe that doing [A] for people [B] will make outcome [C] happen. We'll know this when we see data [D] and feedback [E]."

What's Next?

Now you've got everything you need to double your conversion rate: data, insights, and a prioritized testing map.

Good luck!