



VOLUME

2

THE CONVERSION FUNNEL

Essential Baseline Tactics for Accelerated ROI

INTRODUCTION

WHILE LARGE INVESTMENTS ARE MADE INTO THE TECHNOLOGY AND MARKETING OF WEBSITES, AN OFTEN OVERLOOKED, CRUCIAL COMPONENT TO THE SUCCESS OF ANY SITE IS **CONVERSION OPTIMIZATION** — THE PRACTICE OF DEVELOPING A SITE TO INCREASE THE PERCENTAGE OF VISITORS WHO CONVERT FROM PROSPECTS TO LEADS OR CUSTOMERS.

THIS IS THE SUBJECT OF THIS **INTELLIGENCE BRIEF**.

YOUR BUSINESS MAY RELY SOLELY ON AN E-COMMERCE PLATFORM FOR SALES, OR YOU MAY USE YOUR WEBSITE TO SUPPORT LEAD GENERATION — EITHER WAY, YOUR PROSPECTS AND CUSTOMERS ARE GOING ONLINE AND THEIR PURCHASING DECISION IS BEING INFLUENCED BY YOUR SITE. THE PRINCIPLES DISCUSSED APPLY TO ANY WEBSITE'S END GOAL — E-COMMERCE, LEAD GENERATION, BRAND BUILDING, ETC. ALL WEBSITES SHOULD HAVE A STRATEGIC PURPOSE; SALES, LEAD GENERATION, DATA OR INFORMATION GATHERING VIA SIGNUP (I.E. FOR A CONTEST OR NEWSLETTER) — WHATEVER THE GOAL, THE SITE NEEDS TO HAVE A LOGICAL AND ANALYTICAL PROGRESSION TO ENCOURAGE VISITORS TO **TAKE ACTION** AND **CONVERT**. THIS PROGRESSION IS KNOWN AS THE **CONVERSION FUNNEL**.

TAKE ACTION + CONVERT = CONVERSION FUNNEL

GIVEN THE SUBSTANTIAL RESOURCES DEVOTED TO YOUR SITE AND THE NEED FOR PERFORMANCE, SHOULDN'T CONSIDERABLE ATTENTION BE PAID TO MAXIMIZING ITS POTENTIAL?

THIS **INTELLIGENCE BRIEF** DISCUSSES THE FUNDAMENTALS OF **CONVERSION OPTIMIZATION** AND HELPING WEBSITES REALIZE THEIR FULL POTENTIAL.



DEFINING CONVERSIONS

Every website should have a purpose. It may be lead generation, e-commerce, brand awareness, internal or external communication, or something else. Often it will have one primary purpose with several secondary purposes.

It follows that every site should have a conversion event that is tied to its purpose. For e-commerce, the conversion event is a completed online sale. For other sites the conversion event may be an inbound phone call, event signup, completed form, downloaded brochure or whitepaper, or a newsletter or podcast signup. The more conversions, the better the website is performing and the greater return you are seeing on your investment. All things being equal, a site with 500 conversions per month is performing better than a site with 300 conversions per month.

Of course, “all things being equal” never occurs in practice. Not all conversions are equal, as different products/ services may bring in different amounts of revenue, and different leads provide different levels of potential value. Furthermore, in many cases the actual number of conversions is less important than the total value of all the conversions; in all cases, properly tracking conversions allows revenue to be traced back to the site and an accurate ROI to be calculated.

CONVERSION OPTIMIZATION — AN OVERVIEW

Once a conversion activity is defined and tied to the website’s purpose, the overall goal of all strategy and marketing related to the site should be to increase this activity, whatever it may be. This is the principle behind conversion optimization.



Conversion optimization is the practice of developing (writing, designing, developing) a website to maximize conversions: More orders, more downloads, more signups, more emails, more phone calls — more leads and more sales. There are two different paths to take with conversion optimization: **1)** start from scratch; **2)** optimize an existing site. Starting from scratch is the ideal path as the entire site can be built with conversions in mind. This is, however, not always practical, so there are several methods that can be used to optimize existing sites, like A/B and multi-variant split testing. These will be discussed in more detail later.



The success of conversion optimization is ultimately tied to site revenue, but is also measured by a site's conversion rate. Generally speaking, the conversion rate is the percentage of visitors that perform the conversion activity: if 100 people visit a site and 8 visitors make a purchase, the conversion rate would be 8%. In summary, conversion optimization is the process of strengthening a website's performance by tightly aligning the designs, content, navigation and processes of a site to increase the number of conversions. Effective conversion optimization is both art and science, continually changing and unique to each site. Conversion optimization is not a "thing"; instead, it is a process that involves continuous testing, tweaking, analyzing and refining.

CONVERSION OPTIMIZATION VS. SEARCH ENGINE OPTIMIZATION (SEO)

The buzz of Internet marketing lately has surrounded search engine optimization (SEO), which is separate from, but complimentary to, conversion optimization. SEO focuses on driving traffic to a website through a whole set of activities aimed at increasing its rankings for strategic keywords on Google and other major search engines.



While SEO is concerned with driving qualified traffic to a site, conversion optimization focuses on the actions taken by a visitor once they reach the site. While search engine optimization asks, "How do we get the most visitors to our site," conversion optimization asks, "How do we get all of these visitors to become customers?" Search engine optimization drives the traffic to the site and conversion optimization turns those visitors into customers.

In theory, driving more traffic to a site, no matter the conversion rate, should result in more conversions. However, if the site is not properly optimized for conversions, much of the investment in SEO will be wasted as many of those new visitors will not convert. SEO and conversion optimization are not only separate, but also sequential. It is logically and economically a bad strategy to drive traffic to a site that is under-converting or not offering conversion opportunities at all.

Yet, many of the techniques are mutually beneficial. Conversion optimization aims to make a site more usable and useful, and many of the inputs into search engine rankings are measures of relevance, usability and usefulness. Optimizing a site for conversion will inherently help with SEO and should be the foundation for all Internet marketing efforts.



CONVERSION OPTIMIZATION FUNDAMENTALS

Conversion optimization involves every aspect of a site. From the initial planning of the site to the follow up on a conversion activity by the company, every detail must be considered in light of how it will better convert visitors. The fundamentals of conversion optimization center on persuading visitors to take a desired action, making that action as simple and painless as possible, and in many cases, repeating the action. Optimizing for conversion takes all factors of a website into consideration — strategy, site map and navigation, content, wireframes, design and development.

Site Strategy — Focusing on Purpose and Audience

Every website must have a purpose. For an e-commerce site, it clearly should be to sell products or services. However, for many B2B sites it is all about lead generation. Defining what constitutes a conversion will influence the entire web project and should be the first item addressed in building a site, although sites can definitely improve optimization post-launch.

Once a goal is set, the audience must be defined. What is the site's target audience? This is the most important factor in optimizing a site for conversion. In identifying the target audience, **one** primary audience must be selected. A site should not try to speak equally to several audiences, but instead support the conversion goals of the primary audience above all else. Determining the primary audience will drive or inform many decisions that need to be made about the site, helping to properly allocate resources.

After the target audience is identified, a business should seek to learn as much about the audience as possible. The better the audience is understood, the better the audience's onsite experience can be made. Knowing the audience — what products and information they are looking for, their decision making and purchasing preferences, the language they use, etc. — allows a business to develop their site and user experience (UX) to be as comfortable and familiar to their customer as possible.

Knowing the audience and speaking to the audience in their own language instills within that audience a sense of confidence and trust with the company. Trust is an important factor in the willingness of an individual to become a customer. If the individual doesn't trust a company, they will search for every alternative before giving that company business.



Using [Amazon.com](https://www.amazon.com) as an example, their primary purpose is to sell products to their largest audience, mass consumers. The site has other purposes as well, including building brand awareness, selling advertising space, attracting sellers and account maintenance. There are many other audiences as well including businesses, sellers, advertisers, potential employees and investors. Simply exploring the layout, content and navigation of the homepage



unveils Amazon.com’s focus on selling products to mass consumers. Almost everything on the homepage except for a couple ads and the bottom navigation bar is devoted to selling to the consumer. It is filled with new products, recommendations, special promotions and gift ideas — all singularly focused on getting the visitor to purchase.

Site Map and Navigation

Two of the initial steps in developing a site are constructing the site map and designing navigational structure. Conversion optimization should be taken into consideration in both of these steps. A site map details specifically what pages will exist and a site’s hierarchal structure. When developing it, the audience must be taken into consideration. What are they looking for? What do they need to see to convert? What information is relevant to them? The site map should contain pages that the audience will find useful and be organized in a way that is intuitive, simple and easy to navigate.

The categorization of pages is key as well. How do customers search for products or services? How do they group them in their head? Many times businesses categorize their products or services quite differently than how their customers think about or search for them. For example, a consulting firm may organize its services by specialty — IT, management, marketing, supply chain and finance. Potential customers may think about and look for consulting firms by industry expertise – healthcare, financial services, consumer products and government — because they may not know exactly what assistance they need. If the firm organizes the site by service type, visitors may not feel certain that the firm can solve their problems. The firm needs to find the right balance to develop a navigation structure that resonates with the highest percentage of their target audience. Often multiple categorization methods can be used simultaneously.

The screenshot shows the website for Mowery & Schoenfeld, a CPA firm. The header includes the logo, the tagline 'The Premier Chicago CPA Firm for Business Owners', a phone number (847) 247-8959, and a 'CLIENT LOGIN' button. The navigation bar has tabs for SERVICES, INDUSTRIES, COMPANY, CAREERS, and CONTACT US. The main content area features a heading 'Forward Thinking Accounting for Your Business' Success' and a sub-heading 'At Mowery & Schoenfeld, our diverse services are designed to create a clear picture of your company's current performance as well as its future potential. Through our forward thinking accounting solutions, we don't just report on your company's history, we help you determine its future.' Below this is a grid of service categories: Accounting & Assurance, Tax Services, Advisory Services, and Wealth Management. A green arrow points from the 'Services Category' label on the right to the 'Wealth Management' category in the grid.

Accounting & Assurance	Tax Services	Advisory Services	Wealth Management
<ul style="list-style-type: none">Tax ServicesAdvisory ServicesWealth ManagementServices	<ul style="list-style-type: none">Business TaxState & Local TaxMergers & AcquisitionsCompensation & BenefitsPrivate Client Tax	<ul style="list-style-type: none">Business StrategyFinanceRiskMergers & AcquisitionsTechnologyValuation	<ul style="list-style-type: none">Financial PlanningInsurance & Risk ManagementInvestment ManagementTrust & Estate Planning



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CLIENT LOGIN ▶

SERVICES INDUSTRIES COMPANY CAREERS CONTACT US

Home > Industries

Your Industry is Our Industry

Mowery & Schoenfeld isn't only an expert on tax issues or auditing processes; we're also experts in your specific field. Along with our experience serving a wide range of businesses, we're committed to staying knowledgeable about trends and changes in each industry area we serve. We make your industry our industry—so that we can serve you most effectively.

Construction Healthcare Insurance Manufacturing Division Non-Profit

Learn More Learn More Learn More Learn More Learn More

Industry Category

Similarly, an e-commerce site should offer multiple ways to view products, beyond the primary divisions. Allow products to be sorted by a few different attributes to make it as easy as possible for visitors to find exactly what they are looking for. Cater to the needs and wants of the visitor. The easier it is for the visitor to find what they need, the more likely it is that the visitor will quickly convert and make a purchase.

It is crucial, however, to maintain a balance between accounting for all possible thought processes and simplicity. Err on the side of simplicity. If the categorization and navigation gets too complicated, no one will be able to find anything.

“Err on the Side of Simplicity.”

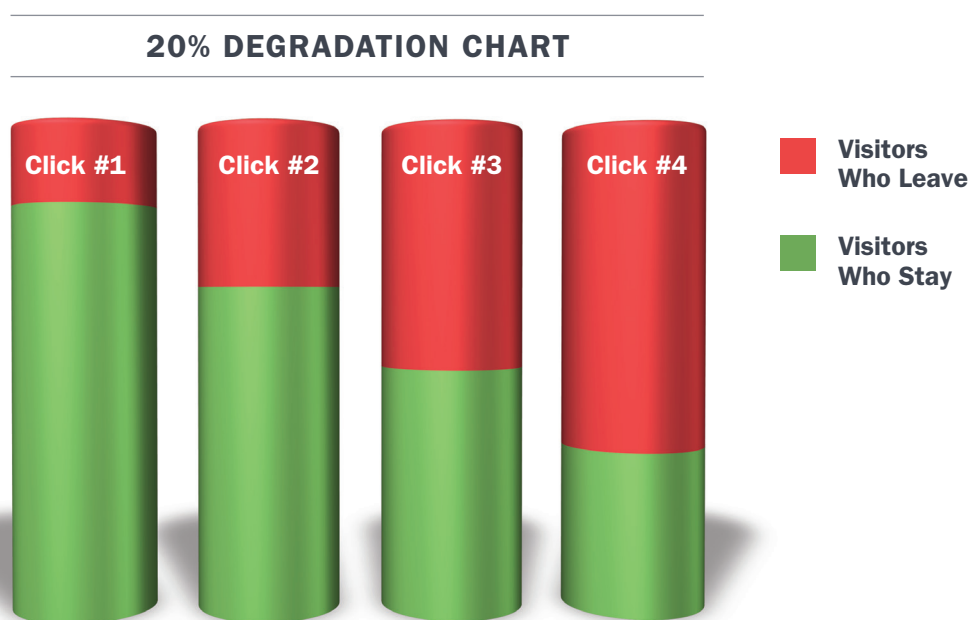
Conversion Process

The conversion process is the steps a visitor will take on their path towards converting. The first step in the conversion process is determining where you want visitors to land. This page is commonly referred to as the “landing page.” This is particularly important for any successful Internet marketing campaign — pay-per-click, search engine optimization, email, social media, or display ads. Landing pages can be pages that are a part of your main site, or they can be stand-alone pages built specifically for a campaign.



For example, if a manufacturer is sending an email to prospects in a specific vertical highlighting a new product, a landing page could be used to facilitate the conversion activity. The landing page would probably not be part of the normal navigation of the site, but a page that speaks to that vertical as a stand-alone landing page. The specific audience then has a page speaking directly to them about the specific product they are looking for.

A key to increasing conversions is reducing the steps a visitor must take to convert. It is estimated that for every additional click a visitor must take, there is a 20% increase in the likelihood that he or she will leave. While the “three clicks rule” (make users click no more than three times to do what they came to the site to do) has been debated, the general principle of reducing the amount of clicks a user must take to convert is still a useful practice.



It is also imperative to give the visitor all of the relevant information that they need in order to complete the conversion activity as quickly as possible. The process a visitor takes to convert is called a conversion funnel. There may be several conversion funnels on the site for various services/products/needs, but they should all present a clear way for the visitor to convert. The conversion activity is defined by the “Call to Action” (CTA), which tells the user what you want them to do. Possible CTAs could include “Buy Now,” “Download Our Whitepaper,” “Request a Free Consultation,” or “Sign Up Today.”



For example, www.trackyourtruck.com is a recent site we developed. You'll notice on every page that is directed at potential customers there is a clear path for a visitor to "raise their hand" and request a quote or call the company. Once they click "Request a Quote" they are taken to a short form to gather information and submit it. A sales phone number is also displayed prominently to offer visitors the opportunity to call Track Your Truck. Both conversion activities are called out with placement and color, and offer visitors an easy way to learn more, and for Track Your Truck to generate a lead.



TRACK YOUR TRUCK

GPS FLEET TRACKING

Different visitors are going to need different levels of information, so giving them multiple opportunities to convert can increase overall conversion rates.

The actual conversion activity should be simple as well. If the activity is filling out a form, make the form as short as possible, collecting only needed information that is not too personal or detailed in nature. Give visitors clear instructions on how to fill out the form as well. For phone conversions, response times should be quick, so callers are not kept on hold; calls should be answered by human sales representatives (not receptionists or voicemail); and, callers shouldn't have to navigate your touch-tone menu to talk to someone. Make it easy!

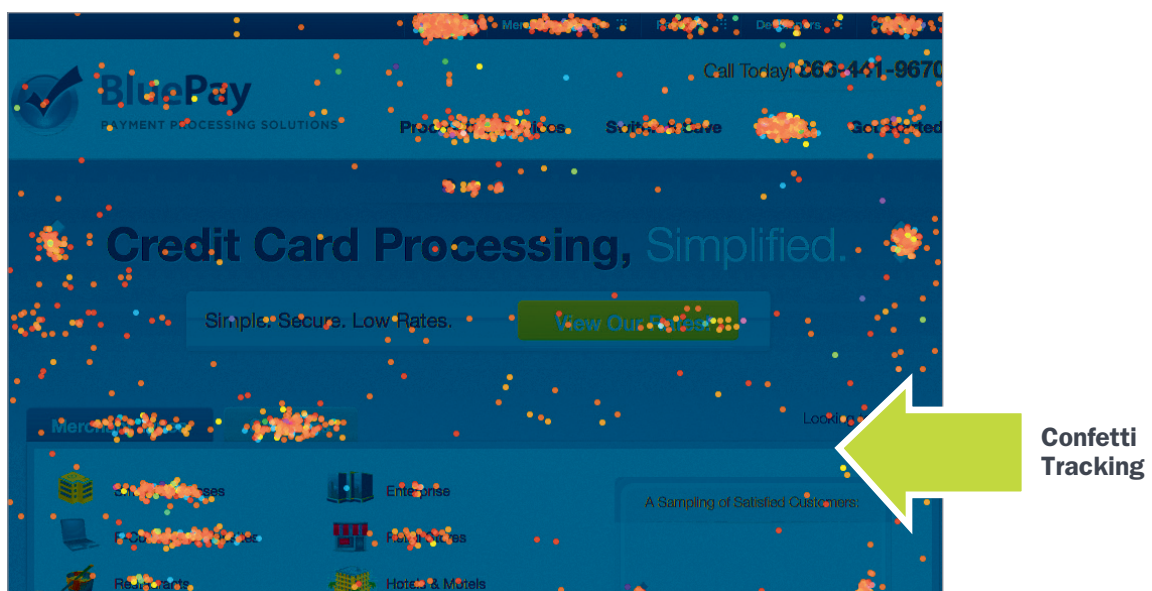
Design

The design of the site will greatly influence the way your company is perceived by online visitors. An out-dated, non-intuitive, un-aesthetically pleasing look will cast a negative perception onto your firm and lower the probability of visitors continuing to stay on your site. This can lead to a higher "bounce rate," or the percentage of visitors that leave a site without going further to the next page.

Several elements go into a well-performing design. Color, imagery, fonts and placement all influence visitors' perception and can help or hinder conversion rates. The site should match the profile of the audience. A website for a financial services firm will look much different from a children's toy seller. A firm's values and tone of voice should come through in their website design. Preferences for design can be markedly different depending on age, sex, nationality, socioeconomic status, vocation, etc. A poor design can quickly dissipate confidence in the eyes of visitors.



There is some science to optimizing designs for conversions as well. Heat mapping can be used to identify where visitor's eyes travel on a page to determine the optimal position for a CTA. Click tracking will provide a similar result. Even designs can be measured for effectiveness.



Content

Content should be informative, compelling and credible. Give the audience the information they want to hear and eliminate any questions or doubts they may have. Again, understanding the audience is key. What language do they use? What are they looking for? How do they make decisions? Some visitors will be more familiar with what you do than others, so speak in the simplest language necessary. Prospects who know everything about your product will be more forgiving than those who know nothing about you.

The length of content will vary as well. Typically the motto is “get to the point,” but there are many situations where longer copy may perform better. If the product or service is complicated, or in a new business segment, longer copy may be needed to persuade visitors that it will solve their problem.

Incorporating testimonials, certifications and awards into content builds credibility and allows visitors to put more trust in the company. Trust is an important factor influencing all purchasing decisions.



Development

A poorly developed site can ruin the best strategy and design. If links are broken, buttons aren't clickable, pages load too slowly or images are not cut right, there will be a poor user experience and visitors will be more prone to leave. Most people don't realize how prevalent broken links are on the web, and the bigger the site gets, the higher the probability of it. Pages that load slowly can even get penalized in Google search results to account for poor user experience. It is the job of the developer to make sure all the strategy, SEO elements, content and design are correctly implemented to create an optimal online experience.

Continuous Improvement — Measuring/Testing/Refining

The investment made on optimizing and building a site for conversions needs to show a measurable return. Tracking and analytics software are important measurement tools, and should be installed on any site that is serious about conversion optimization. Programs like Google Analytics provide metrics like site traffic, conversion rates and bounce rates. Obviously e-commerce sales can be easily traced back to the site, but integrating proper lead tracking and reporting tools can trace leads and revenue back to lead-generation sites as well. Dynamic phone numbers can be given to different traffic sources (SEO keyword groups, PPC ads) so leads can be properly attributed to their source. By keeping detailed information about leads, when a lead turns into a customer and a sale takes place, revenue can be properly attributed to the site. Measuring revenue against the site provides an actual ROI to gauge the effectiveness of your online presence.

Different software programs and techniques can be implemented to test different designs, messaging, placement and CTAs. A/B split testing and multivariate testing allow you to show different versions of a web page to segments of the target audience and compare which one performs the best, taking much of the guesswork out of conversion optimization.

Software is also available to track where people are clicking on a site. This provides additional insight into what visitors find valuable and are attracted to. Based on click patterns, you can choose to visually play up some areas of the site to attract more clicks.

Usability testing can be a great way to understand how visitors perceive, navigate and react to a site. Bringing in random users and recording them while they explore the site and complete outlined objectives is a very telling way to assess how user-friendly the site is: it can be very revealing (and sometimes profitably painful!) to get an outside perspective.

Conversion optimization is a process and not a one-time exercise. Based on results and new intelligence into the minds of visitors, a site can be continually tested and modified to improve conversion rates.



WRAP UP: ACHIEVING AN EXCEPTIONAL ROI

Conversion optimization should be made with return-on-investment in mind. It should not be considered a soft, add-on to a web project, but should be the fundamental factor in the project. Conversion optimization is the key to developing an exceptional ROI for a website. With some simple integration and lead/sales tracking, revenue can be tied directly to a website, laying out a clear ROI.

- **Audience:** Keep the target audience in mind at all times. Build the site to guide the target audience toward completing the outlined conversion goals.
- **User Experience:** Make it as easy as possible for your target audience to navigate the site and complete the conversion goal.
- **Comprehensiveness:** Every aspect of the site needs to be taken into consideration in optimizing for conversions.
- **Continuous improvement:** Conversion optimization is never finished. It is an on-going process of testing, measuring and refining.

At the core, conversion optimization is about focusing on your prospective customers. Keep their interests in mind and make their experience as beneficial, engaging and simple as possible. It seems like common sense, but too often lofty intentions and internal-focused thinking can alienate your visitors and turn them away. Make it as easy as possible for your visitors to do what they came to your site to do — learn more about you and your products or services, and buy! 🎯

All data from comScore reflects Web traffic to the Twitter Web site only and does not reflect the visits to and usage of third party applications that many Twitter users use. TechCrunch estimates that actual usage may be as much as double as the usage on Twitter's Web site. We use Web traffic as a general indicator of usage.



ABOUT STRAIGHT NORTH

WE ARE A TEAM OF FORWARD-THINKING INTERNET MARKETING PROFESSIONALS WITH BATTLE-TESTED STRATEGIC, CREATIVE AND TECHNICAL ABILITY. WE DEVELOP AND IMPLEMENT INTERNET MARKETING SOLUTIONS THAT INSPIRE ACTION, GROW REVENUES AND INCREASE PROFITS. WE SPECIALIZE IN USING THE INTERNET AS A MARKETING CHANNEL AND PLATFORM FOR DRIVING LEADS AND INCREASING SALES TO GROWTH-MINDED COMPANIES — ALL UNDER ONE ROOF.

IF THIS INTELLIGENCE BRIEF SPARKED SOME THOUGHTS IN YOUR MIND ABOUT YOUR WEBSITE OR INTERNET MARKETING ACTIVITIES, PLEASE GIVE US A CALL TO DISCUSS HOW STRAIGHT NORTH CAN IMPROVE YOUR SITE'S CONVERSIONS, INCREASE TRAFFIC AND GENERATE POSITIVE INTERNET MARKETING ROI.



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