

Conversion Optimization

By



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Section 1 - Develop Persona(s) & Hypotheses

In this section you'll learn more about your target customer, based around [empathy exercises](#) pioneered by Enrique Allen of the Designer Fund. You can start by defining a single customer type or "persona". However, your customers are probably represented by a few categories of personas, (ex. suburban moms, teens, and single women) and it's important to understand how to convert each one.

If this is your first time running this play, we recommend you start with just one "global" persona. Think of this person as your perfect customer.

Adam Bonnifield's Pro Tip:

If you don't have any customers or users yet, that's okay. If your persona is part of a broad demographic (e.g. suburban moms), friends or Craigslist is a great starting point (some of the best user interviews start on Craigslist). If your demo is highly specific or technical, Quora is a great starting point - just search for your space and message some of the people who post comments or questions.

Empathy Exercise:

Get your team together and discuss what kind of person gets value from your solution. If you don't have a product yet, think about who gets excited when you talk about what you're working on? If you have a solution in the wild, who are your early and most enthusiastic adopters? Can they be broken up into 1-4 obvious groups?

The point here is to understand how these types of people are feeling when making a purchasing decision, which is crucial to developing messaging that will get them to convert.

The trick is to not get caught up in the weeds of your solution - stay high-level and focus on the real people's feelings and needs. Go through this exercise for each persona.

- **Name the persona:**
Draw the persona and give them a name.
- **Describe the persona:**
How old is she, where does she live, is she married, what is her income?
- **Describe her needs:**
What are this person's pain point, pleasure points, and triggers?
- **Describe her goals:**
What does this person aim to accomplish and how does he or she know when she's succeeded?

If you're having trouble coming up with needs and goals, start with the basic framework, this persona needs x in order to do y and that should help.

Write down as much about your target persona(s) as possible and find an image of someone on the web that represents this type of person (or people).

Develop a hypothesis for your persona(s)

Once you've understood your customers' primary pain points and opportunity, brainstorm a one-line succinct hypothesis for your persona(s) that includes the pain point, the opportunity and how your solution addresses it.

Write it down the persona in your notebook.

Validate your hypothesis with real people

Send direct emails to existing users, customers, or people on your mailing list. Feel free to use the attached template email to help.

- Validate they have the need / problem you've described
- Ask them to tell you a story about when they had the problem and what they were thinking and feeling.
- Validate they goal you've assigned them matches their feelings, and what they were thinking and feeling.
- Do not get lost in talking about the technological specific of your solution. Remember, you're trying to learn about THEM not about you.

Adam Bonnifield's Pro Tip:

You could offer an incentive to people who are willing to talk (like a coffee gift card), but a lot of customers are willing to provide feedback without any incentive.

Script for Requesting a Call

Hi _____,

I noticed that you [seem to be an authority on] [are very active on x forum] [have great insight on...] [use our service regularly], and as an expert in _____ was hoping to interview you to learn more about _____.

The call will take 15 minutes or less and we can do it whenever is most convenient for you.

My name is _____ and I'm the founder of _____.

We're trying to offer the world's best _____ service for _____ and your experience and insight would be invaluable to help us achieve our goal.

Hopefully we'll have the opportunity to talk soon.

Sincerely,

Analyze current traffic for more data points

Where are your current users coming from? Are they coming from specific forums, blogs, search engines (which search terms are they using)? Use these sources as additional background about your customers and their pain or goals.

Analyze the conversion rate of these sites to see which ones are "qualifying" users. What, specifically, is the call to action those sites use?

Adam Bonnifield's Pro Tip:

You can use Google Analytics as a way of measuring where customers are coming from and which ones are converting.

If you haven't implemented "goal tracking" on your website yet, you should probably read [this article](#).

Section 2 - Build Messaging & Call to Action

Now that you have a core hypothesis, develop messaging and a call to action that follows the three golden rules for conversion optimization:

- **Instill Value** - your visitors understand and feel moved by the value opportunity you present.
- **Be Credible** - your visitors must believe you can be trusted to provide that value.
- **Prompt Action** - your visitors must be clearly compelled to take action.

Develop headline messaging for personas

Turn your hypothesis into messaging that describes your solution's value to the user (whether that's strictly a value statement, a product description, or a call to action).

Focus on the impact of your solution and try to keep the messaging as short and clear as possible. Include a product image or other high-quality image that illustrates and supports your messaging.

Brainstorm a MINIMUM of 10 messages and 10 images and select the five most different approaches to test.

Develop credibility & trust for each persona

Credibility and trust is very important to get users to try your solution. Brainstorm ideas on how to communicate credibility and trust. The most common forms are:

- Customer testimonials
- Press mentions
- Customer logos

If you struggle to come up with these, try other ways of either building credibility or reducing point of action anxiety (free product or money back guarantee for example).

Brainstorm 3 - 5 different ways to establish trust and credibility.

Develop action item for each persona

What action are you trying to achieve? Is it a purchase, a signup, email submission?

Brainstorm 10 different ways to make the call to action stand out including different text on buttons, shapes, or processes.

Section 3 - Testing Conversion

This section is focused on putting your hypotheses to the test. You will be running several experiments in a structured way to get qualitative and quantitative feedback on which hypotheses convert at the highest rate.

Setting up your A/B split testing infrastructure

Now that you have 3-5 variations of your:

- Product messaging
- Credibility eliciting attribute
- Action Prompt

You need to setup homepage variations to determine which messaging, credibility, and action items convert best. This is called "A/B testing".

A great tool to use for testing your variations is [Optimizely](#). Below are step-by-step instructions on setting up your account:

Step 1: Go to <http://www.optimizely.com> and enter the website URL you'll be testing.

Step 2: Familiarize yourself with the different features by taking the optimizely tour. They will have already pulled in your webpage, and from here you can select blocks of content, rearrange, move around, change text and colour within the app. (no coding required)

Step 3: Add a snippet of code to your website on the page users land on after converting.

Adam Bonnifield's Pro Tip:

To measure the success of your tests, focus on the conversion goal that's most important. Usually that's not first click (to sign up / learn more) but the last one (to pay or subscribe). See here for support if you get lost for instructions on how to set this up:

<http://support.optimizely.com/kb/goal-tracking-and-reporting/how-can-i-track-conversion-goals-with-optimizely>

Create Experiment [#1](#): Messaging

Optimizely works on the concept of experiments. Each experiment has several variations to be tested against one another.

Your first experiment will ONLY test product messaging and will have anywhere from 3-5 variations based on your brainstorming from the previous milestone.

In the top left corner of the Optimizely experiment you will see "Original Page", and "Variation 1".

Click "+Add Variation" until you have 3-5 variations, then change the main product messaging for each variation using your brainstorming.

Create Experiment [#2](#): Credibility

Your second experiment will only test the credibility factors of your page and will have anywhere from 3-5 variations based on your brainstorming from the previous milestone.

Follow the same steps as the previous experiment manipulating

- Customer testimonials
- Press mentions
- Customer logos

Create Experiment [#3](#): Call to Action

Your third experiment will only test the action prompt of your page and will have anywhere from 3-5 variations based on your brainstorming from the previous milestone.

Follow the same steps as the previous experiment manipulating

Adam Bonnifield's Pro Tip:

Don't be afraid of making your sign-up button bigger and uglier - green and yellow buttons tend to perform well because they clash with most sites' color schemes and therefore capture the user's attention.

Adam Bonnifield's Pro Tip:

*When creating your call to action try to think of wording that reduces anxiety.
Think, no-credit card required, free forever, no commitment.*

Get Human Feedback

Use the following tools to gauge the reaction of focus groups.

[You Eye](#) - This is a great service for finding out if people have expected reactions when landing on your site (Hypothesis testing)

[Five Second Test](#) - This is a great service for finding out if people are confused or overwhelmed by your messaging.

[Usabilla](#) - This is a great service for asking users to click on whatever attracts their attention first. Find out what is most actionable.

Analyze results

Optimizely tracks your conversions using the snippet you placed on your site. You can analyze the results of your experiments from within the app.

Determine the winner from each of your experiments and use the qualitative feedback from the human feedback to come up with the best combinations.

Section 4 - Refine your Segmentation

This section is a more advanced look at conversion optimization for startups who have several customer types or "personas" represented as customers.

You will need to re-run this play for each "persona" and follow the steps in this milestone for customer segmentation.

Segment by Email Groups

If a conversion consists of an email capture look at segmenting emails within an email marketing client like [BusinessCatalyst](#):

Step 1: Create reports which "Groups" your customer types. Each group should correlate to a "persona" identified by your team.

Step 2: Create a list in Business Catalyst, click "E-Mail Marketing" from the left nav bar.

Step 3: As emails are captured through your website you can either import them to their respective "groups" or automate the process with saved reports (for example, by defining groups based on which page the visitors subscribed or how they self-identified in a drop-down menu).

The idea here is you need to segment your email captures so that you can tailor custom email drips, or sales email to test which segments convert into paying customers, which don't, and of the ones that do, which convert best.

Segment by Landing Page

Landing pages are simplified versions of your homepage designed for visitors who are already familiar with your solution, usually because they just saw an ad for it. The cool thing about landing pages is that because you can control where you place ads, what messaging you put in them, and what landing page you direct the visitor to, you can target each persona

So if you're spending money on paid traffic, try setting up different landing pages for each persona you are trying to attract and testing its performance against your optimized homepage. Here's how:

1. Set up an account with [Business Catalyst](#), which is a great resource to quickly deploy templated websites with pre-configured pages.

2. Design a templated landing page using the headline messaging you developed for each persona.
3. Pair those landing pages with ads that have persona-specific messaging to create a funnel where certain personas are directed via ads through to a landing page with messaging targeted specifically for them.
4. Set up an A/B test to see if your landing pages convert better than your regular homepage. Have some of your ads direct to your Business Catalyst hosted page and some direct to your homepage and measure the conversions that result from each. This test should validate whether or not your landing page performs better than your homepage.

Segment Your Organic Traffic with Spinnakr

With this play you have received a free account with Spinnakr.com.

For your organic traffic (that is, all the traffic you can't direct to specific landing pages), Spinnakr helps you tailor custom messaging in the header of your webpages based on the traffic source or type of visitor who arrives.

In other words, all those personas are able to see customized calls-to-action that make sense to them, and Spinnakr will automatically test whether those messages increase the likelihood that they will convert.

Don't worry about a step-by-step process to set this up, just install Spinnakr and we automatically test and recommend messaging that will improve the conversion of your visitors.

About the Author

[Adam Bonnifield](#) is the co-founder of [Spinnakr](#), a website optimization startup. He's spent his career doing conversion optimization for clients around the world.