

WHEREOWARE

Get More Action: Conversion Rate Optimization Checklist



What if you could **endlessly increase** conversions on your webpages and digital activations? Follow our CRO checklist to incrementally **get more customers to take action**, like buying, downloading, or subscribing.

“Top-performing websites convert at **double the average** website conversion rates.”¹

– WordStream

TL;DR - CRO Rules of Thumb

- Find **issues or opportunities** and make incremental improvements
- Use data, but optimize for **human experiences**
- Take a **holistic view** across the entire experience or funnel
- **Micro improvements** add up – don't only focus on the final conversion
- Don't be **afraid to fail** – a testing failure is a lesson learned
- Build a **culture of experimentation** across your business
- **Use tools** to accelerate testing execution and measurement

GETTING STARTED WITH CRO

Find Problems (Opportunities!) to Get More Action



Do You Have a CRO Problem? Benchmark and Measure

- Email Sign Ups / Content Downloads / Demo Requests
- Purchases / Average Order Value
- Website Traffic / Pageviews
- Referring Channels
- Direct User Feedback / User Testing
- Bounce Rate / Time on Site
- Abandonment Rates (Search / Cart / Browse)
- Session Activity / User Journeys (Heat Maps)
- Landing Page Clickthrough
- Engagement with AI Product or Content Recommendations

MULTI CHANNEL CRO

Where Can You Experiment and Optimize?

47%

of optimizers run one or two tests a month.²

Audience

- **Audience Segments** – are you targeting the right users with content or offers to match their intent?
- Are you **excluding** audiences (pay-per-click) or **targeting** by location?
- **MarTech** – Are you using automation to target on activity or behavioral triggers?

Design and UX

- **Layout** – does the design structure balance visuals, copy, and white space to guide users toward the end goal?
- **Focus** – have you removed or **relocated “choices”** (competing elements, like multiple CTAs) to focus users on completing a single goal?
- **CTAs** – have you tested colors, verbiage, placement, font sizes, effects, or shapes?
- **Visuals** – have you tested media types, like photography, illustrations, or video? Have you tried different image placements, themes, styles, or alternative views?
- **Design Match** – are you mimicking design elements across the campaign (from the email or ad to the landing page) to create a consistent, on-brand experience?

1,617%

increase in sales when emails include just one CTA (focused).³



Content

- **Readability** – is your copy clear, concise, action-oriented, and inclusive of keywords?
- **Sentiment** – have you tested emotive language, like surprise, negativity, anger, fear, joy, urgency, FOMO, or sadness?
- **Proof Points** – are you **demonstrating credibility** using social proof, testimonials, or reviews?
- **Pay-Per-Click** – have you tested Ad variations (example seasonal product vs. everyday product); Ad formats (video, carousel, etc.); image extensions; spend; branded vs non-branded keywords?
- **Search** – have you written descriptive and keyword-rich meta title and meta description to aid search?

Mobile Optimization

- **Mobile Optimization** – can users interact with your website and campaigns from any device?
- **Core Web Vitals** – can you improve mobile optimization, **site speed**, interactivity? Can you add mobile visual cues to reduce friction (ex: loading or submission icon)

0-4s

website load time is best for conversion rates.

Execution

- **Webforms** – can you reduce webform fields (no more than three to five fields); ask less sensitive information; add helper copy or visual cues? Are you clearly stating what the user gets (**value exchange**) for completing the form and how you'll use that data? Do you have clear error messaging?
- **Checkout** – can you **simplify** your checkout, reduce steps, add helper copy, proof points, or visual cues to guide the user and cement their trust?
- **Navigation** – can you reduce options in your navigation, relocate less critical elements, or better define category names?

202%

higher conversion rate for personalized calls-to-action.⁴

Experience Elevation

- **Conversion Funnels** – have you taken a holistic look at the touchpoints and traffic sources leading to conversions to identify **micro improvements**?
- **Personalization** – can you use data, audience segmentation, and content targeting to increase relevance?
- **AI Recommendations** – have you added product or content recommendations to boost relevance and discovery? Have you tested the placement of recommendation widgets?
- **Post-Conversion Follow Up** – once a user converts, how are you deepening the relationship or guiding the next action?

Between 2018 and 2020 alone, marketers' use of AI increased by ⁵ **190%**

Conversion Rate Optimization Process



Brainstorm

- **Analyze** your website and campaigns – use qualitative (user surveys and feedback) and quantitative data to find friction.
- **Interact** with your webpages and activations – where do you have trouble or get stuck?
- Document **benchmarks** – where are you now?
- Identify the **highest priority pages** or elements to test and capture remaining ideas in a backlog



Define

- Define a **hypothesis** – what do you expect to happen; what will the test validate?
- Set **goals** – what are you trying to achieve? Tests should tie back to your business objectives
- Set KPIs and **success criteria** – how will you measure success?
- Set **timeframes** – how long will the experiment run?



Design and Build

- Create **content** – create or update assets, designs, or messaging
- Document audience criteria and build your **audience segments**
- Confirm **analytics tracking** is properly set up
- **Launch** test program



Analyze and Share

- Deep dive into results data – what **commonalities** do you see in the audience or activity? What does the data reveal?
- **Measure** success – capture results against your benchmarks
- Document test audiences, results, commonalities, and **lessons learned**
- Share your findings across the organization to build a **culture of experimentation** and identify smarter ways to apply these findings

60% optimizers had no CRO process, or an undocumented/unstructured process.⁷



Accelerate Success with Experimentation Tools - Unlock Your Digital Potential

Optimizely gives marketers the most powerful Digital Experience Platform (DXP) and Experimentation Tools to create and optimize digital experiences that transform your business and unlock your digital potential. As a Platinum Optimizely Partner, we'll show you how.

223%

average ROI for
using CRO tools.⁸



Endnotes

¹ www.wordstream.com

⁵ www.hubspot.com

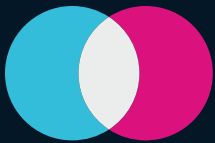
² www.cxl.com

⁶ www.cxl.com

³ www.wordstream.com

⁷ 99firms.com

⁴ www.hubspot.com



Connect with a CRO Expert today!

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