

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.”<sup>1</sup>

– 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.<sup>2</sup>

### 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).<sup>3</sup>



## 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.<sup>4</sup>

## 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 <sup>5</sup> **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.<sup>7</sup>



## Accelerate CRO with Experimentation and Analytics Tools

**223%**

average ROI for  
using CRO tools.<sup>8</sup>



### Endnotes

<sup>1</sup> [www.wordstream.com](http://www.wordstream.com)

<sup>5</sup> [www.hubspot.com](http://www.hubspot.com)

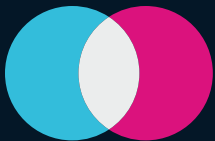
<sup>2</sup> [www.cxl.com](http://www.cxl.com)

<sup>6</sup> [www.cxl.com](http://www.cxl.com)

<sup>3</sup> [www.wordstream.com](http://www.wordstream.com)

<sup>7</sup> [99firms.com](http://99firms.com)

<sup>4</sup> [www.hubspot.com](http://www.hubspot.com)



# Connect with a CRO Expert today!

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