

*FOUNDER'S EDITION*

# MAKE YOUR WEBSITE SELL MORE

# CONVERT



A Digital Marketing Journey Series

by Jim Martin

*'The wealth and value in this book is off the charts' Barbara Carr*



# Convert

Make your website sell more

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# Prologue

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It was 7.30 pm on a Tuesday. Only three employees were still in the office of a marketing agency when one of them started to scream: “this cannot be happening!” The other two jumped off their seats and ran over: “what happened?”

With a trembling finger, the analyst pointed at the screen: “I found this.”

It took the other two about five seconds to realise what had just happened. They were staring at the kind of thing that is a nightmare for any business and any agency: for the past 25 months a Google Ads campaign had been running, spending USD 10,000 a month, driving every click to a page that did not exist.

That campaign had flown under everyone’s radar, burning through more than USD 250,000 in two years.

As fatal as this error was, the large company footing the bill had not even noticed the leak. That is a luxury small and medium sized businesses cannot afford.

You would notice that kind of leak. You would notice the minor ones too. Every single dollar and every single lead matters.

In fact, you are probably not just watching out for leaks. You are probably asking yourself:

- How can I get more leads or sales?
- How can I better manage the work agencies do for me?
- Why do some campaigns work and others do not?
- How can I scale my business?

Running a business is hard enough. On top of that, you have to cut through the vast noise of marketing and choose reliable partners who can help you move forward.

The good news is that you are not alone. Not by a long way. There is a whole group of people out there wrestling with the same challenges. People who are tired of trying one marketing agency after another, who have commissioned several website redesigns without seeing much change, and

for whom, after years of running the business, digital marketing is still a rocky and obscure activity.

Perhaps this time we can do things differently. Perhaps this book can be the starting point of a new way to see digital marketing and websites, and in the process help you find other people who share your pains and have already found a way through.

Let me be clear up front: this is not a '5 step framework to unlock 8 figures' kind of book. It is a journey. We will cut through the noise with a sharp marketing knife and give you the tools to look at your business, your marketing activities and your current partnerships with a new set of fresh eyes.

Let us move away from tactics that will not move the needle and focus on what is really happening behind the scenes of your business, and what you need to do next in order to unlock sustainable, progressive and genuine growth.

Every page that follows is the result of many years of work, study and thinking and thinking again. I hope you enjoy it and, more than that, I hope it makes a difference to you.

## Chapter 1

# Foundations: understanding the context

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In the rush to drive sales we forget almost immediately that we are dealing with humans. We turn to demographics in a hurry (“we’ll market to people in their 40s, that’s our target”) in a brief attempt to simplify the universe of potential customers and get moving. But in doing so, we neglect the experience of the people who matter.

As a professional dedicated to the study of web sales (also called conversions), I have been asked to fix hundreds of websites. And when I say “fix”, what I am really trying to answer is this: why aren’t we selling more? Why aren’t users clicking here, or filling in this form more often?

So we start digging, like web detectives. With a toolset that looks a lot like a doctor’s, we ask the client to describe their symptoms. Do you have enough traffic? Were you selling more before and are now seeing a drop? Based on that diagnosis we reach some initial conclusions: you need to see a specialist, perhaps a Google Ads expert, a web designer, a copywriter, an SEO professional, and so on.

Rinse and repeat. In most cases we get to the root of the problem, and collectively, between everyone involved in the client’s digital marketing effort, we find a way forward.

What makes the difference in the long term, though, is not the fact that we run a diagnosis, or that clients have plenty of partners to help them. The difference is that some businesses and marketing teams want to find out more. They want to go deeper, to understand why they got into this situation in the first place, how to avoid it next time and how to keep improving.

Why does that matter so much? Because at the end of the day it is not the website that needs to be optimised, and it is not the partners you surround yourself with either. At the end of the day the most important, most crucial part of the digital side of any business is... you.

The way you decide what to do, in what order, whom to trust, how much energy to invest, how consistently to show up: all of that trumps any marketing effort or tactic you can ever put into practice.

**This is the true foundation: the way you see and understand web experiences will have a huge impact down the road.**

To build a solid foundation, we need to be honest with ourselves. You have been exposed to a lot of marketing strategies, courses, articles and designs, and you probably already have a solidified idea of what works and what does not.

I am going to ask you to come at this with an open mind, to join me on this journey from the beginning, to take apart what we take for granted and then put the pieces back together. This time, we will sift through a different meaning for each one.

Let us start by highlighting a few paradigms. These are the shared premises we will build from:

- **Nobody will ever know your customers better than you do.** Not even the marketing agencies running ads for you.
- **Your business is unique.** You can have 20 competitors, but your style, your culture and your people will always be different.
- **We deal with humans.** Unpredictable, emotional and varied human beings, who might not reveal the true nature of why they do what they do.
- **You are not alone.** Someone else is facing the same pains and challenges, and perhaps has already found and shared a way out.
- **Bias is the enemy.** A friend who tells you ‘this looks good’ or ‘this looks bad’, an article about the latest trend you might be missing: you will have to fight a sea of external noise that tries to pull you off the path of reason.
- **We need to embrace marketing if we want it to work.** When marketing becomes an ‘I have to’, like everything else on that list, it ends up getting less energy and less attention than it deserves. The same thing happened to me the first time I had to do my own end of year accounting. It went badly until I reshaped the way I looked at it and embraced accounting as a vital part of my business.
- **Patience is a virtue.** To set in motion the changes that produce sustainable growth, we need patience, perseverance and follow through. I know you can do it.

There you go. These are not the ‘7 pillars of automatic success to unlock 8 figures’. They are more realistic premises that will permeate everything we do next. Are you in? Great.

## **Clean slate**

Remember the scene in *The Matrix* where Neo enters a virtual room with Morpheus, a plain white space with nothing in it? They called it 'the construct'. I want us to do the same. I will be your Morpheus. Instead of two sofas and a TV, we will see this:

There is a potential customer on the left and your company on the right. In the middle sits the product or service you provide. As simple as it can be: we want to produce a change in behaviour so that the person on the left willingly, happily, asks for your product or service and you deliver it to them.

Easy enough? Now let us add many more people on the right, many more products and services of every kind in the middle, and many more customers on the left. Cacophony ensues.

Businesses have evolved quite differently depending on where they operate. I can identify two broad approaches: the way of the West and the way of the East.

In the West, we have the classical approach you will recognise instantly. We have a brand, a channel, a message, an audience, an offer, a product or service. To get the machine working we use paid ads and organic traffic as our channels, we tease the offer there, we target audiences as tightly as the platforms allow, and we lure clicks into our websites. Once there, we wrap the offer up, give users extra information and hope that is enough for them to make a decision and buy from us or contact us. Nothing new there.

In the East, and also in Latin America, things are done slightly differently. There is a channel, there is an offer, but in many cases there is no website to close the loop. Instead, the brand skips that step and sends users to speak with a representative directly through a messaging platform like WeChat or WhatsApp.

This is not simply a cultural adaptation. It highlights what humans need in order to complete a transaction: reassurance from another human being that what they are after is legitimate.

When you think about it, websites are actually making a great effort to mimic a human response in order to give users that reassurance: that they are in the right place, that others are engaging with the same offer, that this is what they need today (and not tomorrow).

Very quickly we are stepping into many of the implicit areas a website is expected to fulfil. Before we go further, let us first understand the user's journey and the big areas we need to master to deliver a good experience.

## **The four main levers that affect the way users buy (or not) from you**

If we group those big areas into simple concepts, we end up with four 'levers' that can move businesses significantly. These are our means of taming web traffic and turning it into conversions.

Think of each lever as an area you can control that will either block or unlock the path a user travels from awareness to becoming a regular customer.

### **The first lever: validation**

I have watched many businesses succeed, many fail, and between those two outcomes there is a wide array of differences. For a long time I could not, from a rational and dispassionate perspective, understand the 'whys'. There were simply too many invisible forces at play.

Ironically, that was the start of the answer. If we can see the effects of these forces, can we at least group them and turn the invisible into something we can name?

So I asked myself: what did the successful companies have in common, and what was different in the ones that failed? Simple questions, hard answers. And the clock was ticking, because there were real businesses and real families depending on the answer.

There is nothing more bitter than being unable to help a business thrive. It is a nasty reminder that success is never guaranteed. The best we can do is study, identify and learn from our mistakes.

A couple of years ago I was asked: can you help a recently launched company improve their website so they can maximise the returns on their ad spend? That is what I do. Or at least, that is what I thought I was doing at the time. So of course I said I was happy to help.

The company was owned by two pet vets. They had seen an opportunity to deliver flea and worm treatment for dogs and cats to pet owners by mail, on a subscription. They had opened their doors five months before reaching me and had been spending around 10,000 dollars a month on paid ads. A couple of things stood out:

- They were selling fewer than 10 products a month.
- They were burning through their own savings to keep going.
- They were also paying business advisors and others, and were now about to add me to the list.

Right there, I learned the hard way that in order to improve something, it first needs to work. I did my best to help with the site, simplified their offer

(from 60 or so combinations of products down to three packages), and still they were not selling much. So I did the ethical thing and resigned. Their money needed to be spent somewhere that made more sense from a business point of view.

What was really going on? How does this connect to the four main levers?

The realisation was that every business sits at a given level of maturity. Maturity can be defined as the degree to which a company has identified a need, and then developed and delivered a product or service that has been validated by consumers.

Validation means that over a period of time (I suggest at least a year) and by organic means (not just paid ads), the company has successfully positioned its product or service and achieved enough profit to sustain further growth.

It takes time. We need to see if a product can survive external factors like festive seasons, lockdowns, the kind of wild world changes we saw through Covid, and so on.

On top of that, every time a brand launches a new line of services or products, that line will need to go through validation too. When Cheetos launched 'Cheetos Lip Balm' back in 2005 you could have argued that, because people know the brand, the product would automatically enjoy some success. But that is not what happened. Cheetos flavoured lip balm did not catch on with consumers and was a flop.

This is the first lever we need to recognise when we try to answer the question 'what elements are needed to consistently sell my products or services?'. You can blame the site, you can blame the ads, but at the end of the day, if consumers are not ready for what you sell, or they do not like it, there is no way to brute force it.

So the first lever is **validation**. As for the business I just mentioned: they had been bleeding so much money on paid ads with no return that they were forced to cancel all ads and all the business advisory services they were paying for. They reverted back to step one: validation. They have been trying to grow the business organically from the initial supportive community ever since. I have not seen them grow much, but that is part of the journey.

We need to put the right pieces in place, otherwise we will get stuck. As harsh as that sounds.

Most businesses will recognise pretty quickly where they stand in terms of validation. After a few questions about margins, revenue growth and the period over which that growth happened, a business owner can usually give a sense of how mature or validated their products are.

By the time you read this book, you are probably in one of two scenarios: either you are preparing to launch a new company or product, or you have

been running an existing one for some time, in many cases for years.

If you are in the second group, know that validation will still be relevant every time you launch a new area of your business. If you are confident that what you already sell is validated, close this lever for now. Turn it off and work instead with the following three.

## **The second lever: branding**

This one has to do with something we touched on before. You, as a prospect, are standing in front of someone you either do not know, partially know, or are familiar with. The more familiar you are, the easier the interaction will be. You will know whether what they are offering is what you are looking for, and that invisible trust barrier will not be there.

Easier said than done: how can your company build that level of familiarity with every single prospect, especially when we are not using the 'Eastern' way of communicating, human to human, on WeChat?

Steve Jobs put it very nicely: 'a brand is simply trust'. No matter how small or how big your brand is, you still need to achieve that familiarity with your intended audience if you want to get the best results: to be heard, to grab a prospect's attention, to have a chance to positively influence their behaviour and to build a proper customer and company relationship.

Another great quote comes from Tom Goodwin: "Brands are essentially patterns of familiarity, meaning, fondness, and reassurance that exist in the minds of people."

That sense of familiarity is achieved through consistency in the way a company communicates and acts.

I used to work, years ago, as a digital marketing manager for a large educational group in New Zealand called ACG. My boss, marketing director Kim H., was obsessed with small details to an extent you would not believe. Consistency was her word: 'consistency is the key, Jim', she would tell me.

We reviewed private school brochures again and again. Were the photos the same as the ones used on the international flyer? On the landing page? On the banner at the school entrance? What about the wording? The keywords we used to highlight the schools' values had to be exactly the same, even though we were targeting 13 different countries to attract international students.

'More so,' she would add, 'it is even more important to make sure each country gets our brand the way it should be.'

ACG was sold in 2016 at a staggering 500 million dollars. One of the reasons behind that success was how predictable the experience was. Student agents around the world received the same product, in the same

way, every time. And the quality of teaching was superior too. A compelling offer sustained over time.

What I learned is that a strong brand can unlock a lot of blockages in the process of producing sales (or enrolments, in this case) through ads and websites, because the people on the other side already recognise what to expect.

I concluded that branding is a necessity, one of the four levers and, depending on the company and its context, perhaps the most important of them all. But is that always the case?

I have worked with companies whose branding was neglected and yet they carried on and grew their businesses. How? Wasn't branding a necessity?

Context is king, and I will repeat that again and again. It turns out Steve Jobs' definition had the answer: 'a brand is simply trust'. Do we need a big level of trust to buy a two dollar keychain? Not really.

Now we are on the same page: branding provides familiarity, and familiarity helps the decision making process, especially when the decision is not as trivial as buying a two dollar keychain. Think recurring purchases, big ticket items, sensitive categories.

For example, you have one minute to grab a soft drink from a convenience store. Your car is not parked properly and you are late to meet a friend. You are presented with Coca Cola or a locally produced soda you have never heard of. Chances are you will go for the one you know. That is familiarity in action.

But what if you had time, and you were browsing a cheap offer from a page that is not a recognised brand but still looks legitimate? You would probably buy it, because in that case the need for familiarity and trust in the brand is not as high. You are not risking much on a cheap purchase.

A completely different story is a combination of ads plus a decent looking website leading to a private school where your two children would enrol with 24,000 dollars of annual tuition each. I can assure you, it will take months for you to consider that enrolment. It will take a lot of examination: reading what people say, visiting the school in person, reading parts of the website several times, and more.

So what is the conclusion? It depends on what you are selling. There is a direct relationship with value and cost: the more it costs, the more trust you need to convey. And it is not only about cost. When the service or product is sensitive to you, or to your friends or family, you tend to think it over more carefully.

Imagine visiting a doctor who does not look professional. You will have trust issues straight away. That is even more so if their services are

unusually affordable: you are putting your health in their hands, and the perception of a cheap service can internally translate into 'bad quality'.

## **Let us not forget about the human factor**

Humans will be humans. When branding is not there, we trust the next best thing: other humans. If other people have recommended this doctor and say 'he looks funny, but believe me, he's a terrific doctor', we will find enough confidence to overcome the trust gap and book an appointment.

Can a brand grow so big that it barely needs anything else to produce customers? I have seen some obscene cases in the last few years, and one of them is the perfect answer: Elon Musk and the Cybertruck.

Ugly, irreverent, the polemic electric pickup that did not yet exist, but was congruent with Tesla's core vision. We got a glimpse of it in real life, and Musk knows how to put on a show. People were talking about it, the media picked it up, and all the elements of a trusted brand like Tesla were backing it up.

The result: 1,256,487 pre orders.

Let's run the checklist. Validation? The Cybertruck is a variation of an already validated product line (the Tesla series). The rest of the questions were mostly answered at that live presentation. We could not yet know whether this specific product had been validated, because it was not in the market, but people clearly received it well. It could have gone wrong very quickly, and it did not. Kudos to the Tesla team for creating a concept people resonated with.

Branding? This is where they excelled: the familiarity, the consistency in delivering on their promises. Tesla had been challenged, neglected and ridiculed for years over things that were 'impossible' to deliver, like the Model 3. By the end of 2021 they had delivered 936,172 vehicles in that year alone. That is a very solid brand, giving consumers a real sense of reassurance, with plenty of intangible values on top.

Did they need to run many ads, or to have an exemplary and optimised website? Not at all. Users would find the 'Pre order' button wherever it was, even though it was hidden at the very bottom of a long page.

Later on we will discuss how so called influencer marketing produces such a powerful move across certain industries, but suffice to say that this activity taps into the space between 'branding' and 'referrals from friends'.

The second lever is all about trust, reassurance and recognition. What about the third?

## **The third lever: traffic acquisition**

I will go out on a limb and say that more than half of all businesses use this third lever as if it were the only one, as if the other three barely existed.

To introduce it I want to tap into a deep rooted emotion that lives in the mind of every business owner and marketing manager: the need to survive today.

That survival mode, that evolutionary instinct, is important, and we should not dismiss its influence on our decision making. Keeping a business alive, in many cases, means supporting employees, paying the rent and covering dozens of other fixed costs. We are wired to address the day to day as if it were a hot potato.

The other big element is the nature of marketing itself. As we said at the start, marketing is noisy, confusing and full of unknown variables. When we are in 'day to day mode' we instinctively avoid anything that looks like extra complexity. And what provides a whole lot of complexity? A website.

Between the pain of finding the right platform, the right design, the right content, and the daily pressure to deliver sales, we just want an easy way out.

Enter lever number three: traffic acquisition (also known as paid ads).

I have been around marketing agencies for more than a decade. When I was a digital marketing manager, I hired several of them. Then I worked for one. Then I worked supporting agencies. I can say I have a good understanding of how they work, and, through the work they do, I have also been able to tap into what is happening in the minds of business owners.

Those pains I mentioned? An agency arrives with the promise to 'take care of everything'. A single powerful campaign, whether on Facebook, Google Ads, TikTok or elsewhere, can effectively change the tide for your business. That is a strong promise. No wonder so many marketing agencies exist.

Rather than collide with the existing model, I want to unpack it, so we can better understand what actually works and what does not, when working with agencies.

Some of the benefits of working with an agency, and the reasons we as business owners engage with them, are:

- They run traffic acquisition and media buying for us, almost 100% autonomously.
- Contrary to how we may see ourselves, the agency has trained, experienced and skilled employees who can handle complexities we are nowhere near solving.
- They can bypass, for the most part, the work we would otherwise need to do on our websites.

- They take the decision making and the risk away from us. If they fail, it is on them, and we are only responsible for having chosen them.
- We can focus on the rest of the business, while they take care of generating leads and sales.

Does any of that resonate? I must admit that we sometimes ask too much of agencies.

The key question is: at what point does a marketing agency become a permanent crutch for your business? Or, as I normally put it to my clients, if you shut down the paid ads and the agency services tomorrow, what happens to your company?

Here are the not so talked about downsides of working with agencies:

- The learning stays with them. Over 90% of the time the company could not tell you which ad worked, why, or why another one failed.
- The return on ad spend is not the same as the real cost of bringing in a first customer (CAC, customer acquisition cost). The full cost of running those ads, with their constant promotions, can actually erode the profitability of your company, as we saw with the pet vets example.
- You are avoiding the pain, and at some point you will either hit a plateau where you are not growing and do not know how to move forward, or, worse, the cost of ads will keep rising and you and the agency will find yourselves running to find a new channel or tactic just to keep the wheels turning.

Fair enough? Starting a new journey, emptying your mind, also means talking about the things we have been avoiding. If we want to get this right and achieve that elusive sustainable growth, we need to confront the things we have been ducking.

Embrace marketing instead. You will find that it is not as hard as you initially thought, and that there is a lot you can do to influence better results, even if your team executes the changes for you.

Traffic acquisition as the third lever covers every tweak, test, setup and adjustment you can make to influence the inner workings of traffic acquisition in order to get a conversion. It also covers every way of bringing new prospects through your door, beyond paid ads: billboards, flyers, and so on. SEO (search engine optimisation) counts as traffic acquisition too, even though much of the work happens on the website itself.

## The fourth lever: websites

The second lever, branding, tends to be neglected. At least it grows organically over time: your brand will naturally grow for the simple fact that your company is active. This fourth lever, however, is severely neglected in most cases.

We are talking about websites. Remember the story in the prologue, about the campaign landing on a page that did not exist? We do not need to go to such extreme lengths to find complete holes in the user experience.

We tend to focus on 'how the campaign performed', but the first thing we fail to see is that a web experience is the sum of a *promise* (traffic acquisition) and the *delivery* of that promise (the website).



[ figure ]

*A blunt but unfortunately common representation of the user journey.*

If we make you a promise through an ad showing a 25% discount on a specific product, and you click and do not see that discount anywhere on the landing page, there is a broken promise right there.

If I Google something and the search result shows your company saying 'we are the number one service provider in this location', but when I click I cannot find my location anywhere, I will feel deceived as a user.

'Why didn't the campaign work? Why aren't we converting organic traffic?', we ask. We can fall back on analysing the performance of Google organic traffic, or how Facebook ads did or did not work, as if this were a binary scenario. But the truth is that the web experience got broken somewhere along the way.

In fact, it is rarely a black and white scenario. Out of a need to simplify what went wrong, we jump to conclusions: 'the campaign didn't work'. Later on we will see how to deconstruct a typical user journey and how to put tools in place to see the whole path.

**The conclusion will be: users do not drop off equally from every page. When you do the breakdown, you find that certain pages and certain devices produce more friction than others.**

That is the number one issue with the fourth lever. We tend to treat websites as independent entities, like billboards. We expect people to decipher on their own what we sell, how to buy it, and, in the process, to answer the very questions another human would happily answer for them.

It is time to bring these four levers together and rework, more than anything, the way the last two operate, always remembering that they are all part of the same machine.

There was a bright moment, one of those that comes every five or ten years, when I saw it very clearly: these levers working together, in context, and the results they bring. Back then I called it 'the alignment'. It was enough of an epiphany that in 2018 I created a consultancy called Align Digital to reflect the series of steps that need to happen for a business to grow online.

Years later I found an easier way to explain it: casino slot machines. Certain combinations give you some rewards, but when you hit the '7' in each lever, you unlock the jackpot. That is what we want to achieve. Everything that comes after this initial explanation is aimed at unlocking that alignment, helping you see the inner components of each lever so you can check them against your own business and identify where to put your attention.

## **The formula for conversions**

Conversions can be anything you want users to accomplish as the main goal: a product sold, a booking completed, a phone call, a lead.

Ever since websites were put up on the glorious internet, people have been researching hard how to sway users' actions towards the ones we want. In short, how to increase the number of conversions with the same number of visits. After more than 20 years, they have made some findings. I want to share a few of the key ones with you. They further simplify the use of the four levers.

Some caveats first:

- No formula, framework or methodology will work 100% of the time in every case. The random nature of humans guarantees some level of unpredictability, always.
- There is more than one school of thought, each proposing variations of the same formula. I will give you the synthesis of the one that I have found works best in practice.

This is a concept you can take with you and use in every marketing activity. Is there a way to get an overall understanding of what is needed to get a sale, a lead or a booking in every scenario, no matter how small or how gargantuan?

This is what the experts at the MECLABS Institute concluded years ago. The elements needed in every scenario to increase the probability of a conversion are:

- Initial motivation
- Clarity of the value proposition
- An incentive to take action
- Frictions presented throughout the user journey
- Anxiety about entering information

Each of these elements carries a different 'weight':

- Motivation and clarity are paramount, by far the most important aspects.
- Frictions and anxieties are barriers that need to be overcome by the first two.

In other words, the probability of a sale can be defined and simplified as: it is all about motivations versus frictions.

When influencers present something 'hot' to their audience, they are in many cases lifting the initial motivation so much that the audience will forgo any friction the website presents in order to buy the product.

So what exactly is 'friction'? Friction is when the required energy is greater than the motivation for the actual outcome.

Think of that time you saw something compelling enough to try or to buy, but halfway through the process you got tired of typing in information or of following through so many steps. Those are the frictions that, little by little, diminish your initial motivation.

Keep these two concepts handy. We will use them a lot from here on. Four levers to understand the overall context you are operating in, and a simple formula to gauge the user experience as a whole, from the promise to the delivery of that promise. Does it feel a bit easier now? A bit less scary? Marketing can be manageable, I promise.



Chapter 2

# Value proposition, positioning and messaging

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It would be pretentious to try to cover topics like these in just a chapter or two. The same happens with branding. Instead, what I want us to do here is to look at these in the context of your own journey, highlighting the uses and needs of value propositions, positioning and messaging.

Let us get back to the white room. Nothing in it but your company on the right, a potential customer on the left, and your product or service in the middle. As we said, suddenly hundreds of companies appear next to you, all trying to talk to that same prospect. That is noisy. Very noisy.

## Value proposition

How do we cut through that noise? With a solid, clear promise. We encapsulate that promise in what we call a value proposition. Its job is to portray what the product or service is about, to communicate what the customer will receive, and to explain why it is different from the rest.

In essence, a value proposition answers the following questions:

- What are you trying to sell to me?
- What's unique or different about it?
- Why do I need it, and why today?
- Why choose you and not someone else?

Two things to say about this:

1. In the rush to reach the prospect, you will notice that your competitors are not doing a good job with their value propositions either. We will look at examples below, but let me tell you that this piece of the marketing machine is one of the most neglected of all.
2. The questions can be answered through copy or through imagery (we will talk more about this when we get to 'factual versus conceptual')

messages).

There is always a promise made to our potential customers. The biggest challenge is to craft a value proposition that cuts through the noise.

When we search for products as users, the scenario tends to be messy. For example, when searching for Possum Merino (a type of soft fabric, ideal for colder climates), this is what you see on Google:



[ figure ]

*Search results for 'Possum Merino': a mix of promises, very few of them clear.*

These are all promises the brands are making to users, whether those brands acknowledge it or not. The first result says 'you look for Possum Merino, we have Possum Merino knitwear, wool clothing'. The short description adds 'once you've tried it nothing else will feel as warm and soft'. This is the beginning of a value proposition. It is 'part 1' of a promise. 'Part 2' is what the user sees once they click.

The problem is that if you are searching for Possum Merino, you probably already know what it is and how it feels. So as a brand, NZ Nature is not really answering any of the questions we just listed. Why choose you? What is different? What is in it for me?

To recap, here is a solid definition:

*"A value proposition is a clear statement that offers three things: relevancy, quantified value and differentiation." (CXL.com)*

- **Relevancy:** how your product or service is valuable to them, and how it benefits them or solves a problem.
- **Quantified value:** the specific benefits they get.
- **Differentiation:** the reason to choose you instead of someone else.

It is tempting to go deeper into 'how to craft value propositions', but we need to carry on with the rest of the book. Otherwise we would not have a book, we would have the British encyclopedia.

To conclude this point: a value proposition is needed in every piece of key communication, especially on your website. It is not limited to the homepage. You need them on product pages, landing pages, anywhere a user is deciding whether to continue their journey with you or jump to a different tab.

## Positioning

What is positioning, and how is it different from a value proposition?

*“It defines where your product (item or service) stands in relation to others offering similar products and services in the marketplace as well as in the mind of the consumer.” (The Economic Times)*

Coined by Al Ries, who has written a great collection of marketing books such as ‘Marketing Warfare’, the idea is that brands should do more than simply replicate what their products are about. It is about how people feel about what you offer, not just the specifics of the product or service.

It does not really matter whether a Louis Vuitton bag has one pocket, two, or none. What matters is how the consumer feels when carrying one. When we use iPhones there is an implicit quality associated with the phone, even though most of us have no idea what is really inside and how it compares with other brands.

Positioning is hard for more traditional types of business. I have had the chance to work with car rentals, meal preps, bamboo toothbrushes, supermarkets, osteopathy clinics and many more. In most cases there is a sense of what competitors are doing and the number one way to compete is to cut the price of the service or product. We will discuss it in more detail later, but what Seth Godin calls the ‘race to the bottom’ means that when positioning is not planned, you do not get the impact you are after.

Someone once told me: ‘imagine your friends talking to you about a product or service. You forgot the brand name but you want to search for it. Which words would you type?’ Those are the words related to your positioning.

You are making a conscious effort to influence how the consumer sees you and what you sell. Is it a luxurious item? Is it innovative? Is it exclusive? Is it for families? For adventurous people? Remember that the more we work on establishing a product or service that feels familiar to the intended consumer, the more likely we are to get their attention and, eventually, to make a sale.

While branding sets the foundation stones, positioning sets the frame of reference for what to expect from the brand. It aims at the emotional side.

Let us bring in some examples, and let us talk about factual versus conceptual messages. First, a quick refresher:

- We want users to be as familiar with our brand and products as possible.
- We want to lift their motivation as much as we can before they even get to our website.

- Once they are there, we fight hard to cut through the noise with a clear message.

That makes sense, right? Let us revisit a real, down to earth example, and work through it together.

We own a car rental company. The country is New Zealand, though honestly you can put yourself in any country. The business is tough: while we can get a heavily discounted price when buying cars, there are many other rental companies and it is a race to the bottom. Everybody is offering discounts as the primary way to get attention and to lift motivation.

From a brand point of view, we cannot immediately see anything that really distinguishes us from the rest. Looking at potential value propositions, after a lot of thinking, we come up with these points:

- We are one of the cheapest in the market.
- Our cars are not fancy, although we have a range.
- The cars are of Japanese origin and easy to drive (automatic shifts).
- They are not new, but we have a great safety record.

That is us, in a nutshell. Most marketing books or courses talk about value propositions and positioning with examples from unique companies. In reality, the day to day is quite different. Most businesses do not have a way to stand out from competitors straight out of the gate.

Who typically rents from us? Business travellers who come to the city, families who do not have a big or safe enough car or SUV for a trip, people who are hosting events and need people movers, friends who rent a car and travel around the country.

Here is the crucial point. We all have an opportunity to find ways to differentiate, to narrow down to one type of customer, and to find value when it seems impossible.

It will take hard work, no doubt. But it can be done. It *needs* to be done, in every case. This is my invitation to you, to do something similar to the exercise below.

We look at ourselves and ask 'now what? What are we going to say, and to whom?'. It is not the same to speak to a business traveller, to someone renting a people mover, or to a family of five going around the country. Where do we start?

We begin by choosing one audience. Only one, for testing. How do we decide? Aim for the winners. We consult our databases and Google Analytics, and after some research we arrive at a piece of beautiful data:

Of all our customers, the ones who need the least time to consider the offer, who rent most often and for the longest periods, are women between 27 and 34, professionals living in the main city (Auckland).

We have just identified the person on the 'left' of our white room.

Now let's talk about the service itself. We want them to rent a car. Yes? No, actually no. That framing will not take us far. Think about what we mentioned before and ask yourself: what do they want the car for? What does renting a car mean to them?

After spending some time thinking about our potential customers, stepping into their shoes, we conclude the following:

- Professional life is taxing. We want some time out.
- Life is not only about working, it is about gaining new experiences.
- Our friends from work and from life share these values.
- We are free to make our own decisions, and to choose how to spend the next long weekend.
- We have the means and enough budget.
- We are after a memorable experience.
- We just need the right trigger, the right push, and convenience.
- It does not matter whether we rent a Volvo or a Toyota, as long as it is safe and easy.

Suddenly this is not about us. Not about our cars. Not about that race to the bottom with cheap pricing. And it is not about irrigating the market with generic ads saying 'we sell possum merino', or in our case 'cheap car rental in Auckland'. We can control the narrative. We can cut through the noise if we bring some empathy and think more deeply about our customers.

So, they want to have fun. Can we deliver that? We look at the next layer: what kind of cars are they renting? Where are they going (it varies with the season, but roughly)? How many people are usually in the car?

Once we have some answers, we go deeper again. An average of five friends in a car. The typical car is a Toyota sedan. Let us imagine we are all together on a trip that usually lasts three hours. What makes the trip more enjoyable? Music and photos.

So we check the car stereo and Bluetooth. We make sure it is easy to use, and leave a simple manual with instructions if needed. We also check that we have dual USB chargers front and back. These guys are going to take photos and use their phones a lot. Let us make sure they have what they need.

Now our value proposition is taking better shape. The main message could revolve around the freedom we enable through the convenience of our cars. We can briefly highlight the features that are relevant to them: simple Bluetooth access with great sound, plenty of USB chargers, enough fuel for those three hours and beyond.

The whole point is to narrow down who this is for, so we can do a better job of saying ‘why us, why now’. More on this when we get to the messaging section.

In terms of positioning, placing our cars in the minds of these professional women, how do we do it? For them to talk about us, to remember that we are *the* car rental for their trips, we need a consistent marketing effort. It is not that hard, but it needs to be consistent across every ad, every marketing asset, every activity we run for this audience. Over time, if we succeed, they increasingly associate our rental company with freedom, adventure and good times.

This brings us to factual versus conceptual ads. Factual ads are straightforward, telling you what you do: ‘we offer emergency electrical services’, ‘24/7 car repair assistance’, ‘yoga and pilates for mums in their 30s and 40s’, ‘16 GB RAM, 256 GB storage and 4.7 inch screen phone’. They talk about features and describe what you do factually.

Conceptual ads do not talk about features. They talk about you, your feelings, your experience. Apple ads are mostly conceptual: ‘Life is easier on iPhone’, ‘Privacy matters’, ‘Welcome to the big screens’. Nike does the same: ‘For your health’, ‘Twice the gusts, double the glory’, ‘Leave nothing’, ‘Rise through adversity’.

The advantage of conceptual ads is that they tap straight into positioning, because they aim to trigger the emotion the audience associates with the brand. ‘Nike invites me to be a better athlete.’ ‘iPhone has my back with privacy.’

When do you use one type over the other? When a brand is very well established, it can go full conceptual. In our car rental case, we probably need a mix. We can deliver a factual, clear message and support it with relevant, emotion linked photography.

For example: while we talk about how our cars are convenient, with Bluetooth and USB chargers, we use imagery of a woman in her late 20s looking through the window of a car. We do not see the whole car, and that is not important. What is important is that she is happy. She is not alone: we can see the silhouettes of her friends in the car. We can tell she is near the sea. Clearly, it is a trip. She is having the time of her life, and the whole ad or landing page is promising that this is the kind of experience they will get if they hire our cars.

## **Messaging**

Words carry meaning. We tend to put the words for search engines before the ones our users need to hear.

Imagine the scene in the white room. Our potential customer is on the left, the service in the middle, and we stand on the right, next to dozens of others. The moment arrives: we have our chance to speak. We go and say things like ‘Auckland area, CBD, cars, affordable, book now’.

I am pretty sure search engines are delighted with our choice of words. But our user? That robotic jargon immediately becomes pure noise, just like the Possum Merino example. The messaging is not there.

What exactly do we need? Messaging is a subset of positioning. It is the specific words we use, in the context of our positioning and our value proposition. It maintains the tone of our brand and talks directly to our intended audience.

Miller’s Law: in 1956, in *Psychological Review*, George Miller concluded that the number of objects an average person can hold in working memory is about seven. For us, that means the messaging needs to be as simple as we can make it, and if we are going to list benefits or product characteristics, we should not go above seven of them.

When we get to landing pages in more detail, we will see some examples of messaging in action and how it forms a story within ads and pages.

To close out our car rentals exercise, we used messaging built around ‘Let’s go. Save on car rentals, spend more with your friends.’

We supported it with a combination of easy to see advantages:

- Enough luggage space for everyone
- Easy and convenient pick up
- Easy car selection
- City and route ready, just pick and drive

We used these for the ads and the landing page, and further down the page we reinforced them with:

- Unlimited kilometres
- USB chargers for all passengers
- 24/7 roadside assistance
- Free extra drivers
- Bluetooth ready to pair with your phone, bring your trip music along

We also talked about typical destinations and added testimonials from the same type of customer who had already had a great experience.

Wait, did I not mention this before? This was an exercise, but it was also a real case I had the chance to work on. The results? Before this exercise, 1.5 users out of 100 would book. After this new approach, we got 6.3. That is a 6.3% conversion rate, up from 1.5%. A substantial jump, bearing in mind that the campaign was highly and tightly targeted to one specific audience, so the overall volume of bookings was lower, but the efficiency meant we did

not need to spend as much to get better results. It opened up the possibility of running the same exercise with other types of customer. If only Covid had not hit. It put everything on hold and brought massive changes to the way customers behave and travel.

I hope these definitions and examples are clear enough to get you thinking in your own context. And look, I had not even finished writing this book when some clients were already asking: ‘but this thing you are writing about, does it apply to B2B? To B2C?’ My answer is always the same. It applies to humans. The context of your own business will dictate the tone, the format and the strategies. The white room with a prospect on the left, a product or service in the middle, and you on the right, applies to any kind of business.

## The alignment

When you read these points, and even more when you work through them, you can feel a natural flow happening behind the scenes. In the previous example, we revised the product (a rental car) through the eyes of one high performing type of customer (women aged 27 to 34, with no kids, travelling with friends).

There is an alignment that happens when you identify a key audience and realise that in order to serve them better you will need to change several things:

- The way you reach them (different types of ads).
- The way you talk to them (more personalised).
- The way they will experience your product or service (making appropriate changes where possible and needed).
- And, in the end, the way the whole company behaves once this starts to work well.

When Steve Jobs took over Apple in the late 90s he saw something similar. The company was governed by day to day sales. Innovation was subordinated to sales. More than that, Apple was talking to everyone and, as a result, talking to no one.

What happened next was a massive alignment. There is a video where he fields a rather toxic question from a developer in the audience, and he says:

*“You can’t start with the technology and try to figure out where you’re gonna try to sell it.” Instead, he suggested: “We rework our vision and strategy at Apple, thinking what incredible benefits can we give to the customer. Where can we take the customer?”*

That is the same for all of us. The same for your business. Because of the pressure of day to day sales, we end up grabbing whatever we produce and pushing it into people's ears: what Seth Godin calls 'interruption marketing'. It should not be this way.

When an interviewer asked Steve Jobs what marketing was for him, he replied with something that stuck in my head for a long time. I remember thinking 'what is he even talking about?'. He said: 'Marketing is all about values.'

It took me some time to get to the realisation. The more aligned and consistent your entire company is, in terms of branding and messaging, towards what you really want to communicate to that specific target audience, the more effective your efforts will be. It is hard to see, because we are so used to generic ads and generic audiences. Our services and products come across as extremely similar to those of our competitors.

But we can change that. We can start working on an alignment that brings a core vision across the whole business.

If the car rental company really wanted to focus on its vision, this is what it would end up doing:

- Solidifying its brand core values and vision: why are we renting cars? To whom? What purpose motivates us to do a better job as a company?
- Finding out: who are the customers we love to have? What do they do? What do we already know about them, and how can we get to know them better?
- Following on from what we decided at the top (brand) and from the desired type of customer, how can we improve the experience for them? What specific information, features and benefits can we add to our existing offer to raise their motivation when they engage with us?

Alignment can, and should, happen in every business. I am pretty sure you have plenty of opportunities to start revising value propositions, choosing an audience and triggering new thinking about what you could be doing for them.



## Chapter 3

# The offer

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It all comes down to value perception. The ideal offer is one that is received with open arms, a no brainer, while the business earns enough profit margin to celebrate every sale.

Too idealistic? I know. But believe me, you have already seen this happen. Not with every client or customer, but some of them certainly enjoyed what you offered. That is how your business earned the validation it needed: by providing an offer that, as a whole, worked for both sides.

Let us be clear: the product or service is what we sell; the offer is the way we sell it. That is an important distinction. You can be selling the same service and, with minor tweaks, create a big difference in terms of value perception and in terms of friction.

‘What do you mean by frictions?’ you might ask. Let me give you an example.

A B2B/B2C company that sells agricultural machinery is now pushing to sell online. They have roughly zero sales through their e commerce platform and ask for help to change that.

When we look at the site, we find that:

- There are no prices or price ranges.
- You need to book a call with a salesperson to get to know more about the machines.
- The site looks abandoned, as if nothing new has happened for four years.
- Most of the available information has been lazily put into downloadable catalogues, in PDF.

How do you get the prices? ‘Contact us and you’ll find out more about the offer.’

This product can be portrayed and sold in different ways. The current one presents friction, because it takes a massive effort just to be willing to contact them, only to start getting a sense of the pricing. Could they have done something different?

A potential new offer could be:

*“Buy our machine. It comes with two years of insurance and 30 days of support to correctly implement it, with the chance to return the product if you are not happy with it.”*

What happens in these cases? And what happens every time we just say ‘hey audience, here’s our product, contact us for more’? We end up with a...

## **Black and white scenario**

A potential customer gets to see your offer. That offer, as it stands today, is the only one you have put together for everyone who visits your site. The prospect arrives, sees the offer, and says either yes or no. End of story.

If 1 in 100 potential customers says yes and that is not enough for the business, we typically either try to bring in 200 visitors instead, in an attempt to get at least two new customers, or we try to get two out of 100 to say yes.

Bringing in 200 potential customers instead of 100 is twice as expensive (these numbers are only examples). Increasing traffic volume does not automatically increase profitability.

To increase the number of conversions, we need good offers aimed at the right people, at the right buying stage.

Take, for example, a personal trainer and her business. She offers one to one tailored training for people like me, who spend a gazillion hours in front of a computer. Her business, and many others, works like this: are you interested in personal training? Yes or no. Black or white.

What happens to the ones who said no? It takes a huge effort to bring someone to a decision stage, only to lose them there. What could we do about it?

Remember what we discussed before: each potential customer sits at a different sales stage, in a different buying phase. In this case, we can assume we would have:

- People who asked about personal training because a friend recommended it, but are still unsure whether they need it or want it.
- People who want it, who need it, but feel it is too expensive.
- People who do not really want the training itself, but want the status of having a personal trainer.
- People who do not want to do it but really need to (for health reasons).
- People who are prepping in advance for something they are thinking about doing three months down the line.

- People who ‘saw the light’ and just want to find out more.

If we get a chance to have an initial conversation, or if we can guide each of these types of visitor to the right content on our website, we can:

- Offer some of them a newsletter, where they get free lessons without spending any money.
- Offer them a training package, with instructions and supporting elements they will need: food supplements, stretching support for the day after the gym, a curated selection of songs for their sessions, and so on.
- Offer others a ‘light’ package where they do their own training and can check in with the trainer from time to time to see if they are doing things right.
- Offer a standard package, with normal training.
- Offer a premium package: normal training plus food supplements, a tailored plan and accountability via an exclusive group.

If you put your mind to it, you will see how quickly you can come up with different offers that break the black and white. They provide better solutions to people at different buying stages and, at the same time, open up new ways to earn revenue.

Another example: a client of mine works in osteopathy. Similar to gym training, osteopathy trades hours for money, as do countless professions like chiropractic, physiotherapy, psychology and counselling of many kinds.

Black and white also happens after the sale. Before you say ‘excuse me, say that again?’, remember what we heard from Steve Jobs: ‘how can we add benefits that will produce a superb experience for our customers?’.

Let me ask you this: when you and your team discuss the current customer experience, have you thought about where it begins and where it ends? All stages matter.

## **Black and white after the initial sale**

Most businesses stop thinking about the customer right after they get a sale or deliver a product or service.

- The dentist tells you: ‘please floss your teeth, okay?’ and off you go.
- The personal trainer says: ‘don’t forget to eat well, rest, stretch, okay?’
- The osteopath says: ‘here you go, all patched up. Next time, please sit better in that office chair and change your posture.’
- The plumber says: ‘your clogged sink is all fixed up, see you when you get another issue.’

- The breakfast as a gift company says: ‘here’s your tray for Mother’s Day, hope she enjoys it’ and off you go.
- You buy a TV from the store. The most you get is a ‘rate your experience with our company’. Nothing else.
- You visit the zoo, nice giraffes, off you go.

Let me ask you something else, with total candour. Do you really believe the user’s journey ends once they get your product or service? Do we actually deep dive into understanding what that product or service was needed for, and how we can continue adding value afterwards? Tough questions, right?

To set our offers apart and to scale our business, we need to revisit these moments. Here are some potential ways to answer the situations above:

- **The dentist** says: ‘we really want you to have the healthiest teeth, the ones that make you smile with confidence, always. To help you with that, we created a program where you can see from your phone what are the best ways to support you. If you join, we will send you a new toothbrush every three months, the one we recommend: a bamboo made, ecological one that does a great job.’
- **The personal trainer** says: ‘Look, what you do after the gym is as important as what you do inside. If you are really committed to achieving your goals, I can support you with a custom diet, stretching guides for the day after, motivational podcasts to keep the ‘eye of the tiger’ throughout the whole program, a music selection that will pump your spirit, and stretching tools curated by me that you can use every day.’
- **The osteopath** says: ‘massages are not just for stretching your muscles, they are something you deserve for everything you have going on in your life. Because we know how taxing life can be, we have a relaxation program that will make you feel like you are walking on clouds, every day. When you subscribe to our premium product you get: two massage sessions a week; candles and a shower program to turn your bathroom into a beautiful shower experience; selected music to enter relaxation; massage tools you can use every couple of hours; and access to our podcast focused on how to live positively, with energy, every day of your life.’
- **The plumber** says: ‘all fixed. You know what, we can provide you with an automatic filter system that keeps your water jars 100% clean. Would that interest you? Also, to avoid clogging your sink again, here are some recommendations for ideal products, plus ways to keep your kitchen shining.’
- **The breakfast as a gift company** says: ‘here’s your tray for Mother’s Day, we hope she enjoys it. You only have one mother, so why not

surprise her from time to time? If you liked this tray, subscribe to our bi monthly Mum surprises. Here are some examples from the past, she'll love it. Also, if you register we can help you prepare for any upcoming birthday or celebration this year, send you ideas in advance and sort delivery for you.'

- **The TV store** sends you a message two days after the purchase: 'was the size of the TV right? What about the wall mount? We are happy to install a better one at no charge if you buy new wall support. And would you like to rent the ultimate sound experience from us? Find out how much better your TV experience can be with this equipment. If you like what you rent, we can give you the real deal in 20 payments.'
- **The zoo** asks if they can send you promotional offers and info about cool upcoming events. They capture the age group of your family and you start getting emails like 'school holidays are around the corner. We have a great show for kids aged between 5 and 8, with limited seats. Since you visited the zoo, we are saving you one spot: would you like to confirm it?' Or: 'Are your kids asking you more about the animals they just saw yesterday? Access our exclusive bookstore with highly detailed information about the life of each animal they saw, plus get a discounted ticket to revisit the zoo.'

Offers let us present the product or service in countless ways, both before and after the purchase. The possibilities are endless.

## Price anchoring

We already mentioned that offers have everything to do with value perception, and that we can build compelling offers as long as we get to know more about the user who lands on the site.

Something else is also true: we can lift the value perception *within* our own offers. Let me start with an example and then we will dive into the definition.

A company provides a curious service. They analyse hair samples and produce a test that reports on allergies, organ functions, hormonal balance and so on. They offer four different types of tests. Most users buy one, and almost nobody buys all four upfront.

I was hired to analyse user behaviour and find a way to persuade or encourage more people to buy four instead. One test costs around 150 dollars, four tests cost over 500 (there is a discount). The offer is placed as 'buy a test', and then when you get to the checkout you get an upsell suggestion: 'why not four instead of one?'

Not only is this a black and white situation, the upsell also comes across as a hard sell. We are asking too much at once, because users see the price go from the hundreds to the five hundreds without being able to sense anything, in value terms, that would prompt them to buy it.

I concluded the following:

- We are really here to increase the average order value as much as we can.
- Value perception needs work: users see a massive gap between one and four tests.
- The offer is too blunt (black and white).

Enter price anchoring. The original offer sets the cost of a single test as the anchor. Anything we propose on top of it will be compared against this. Currently, users are thinking: 'either I pay 150 for one, or I have to go all the way up to the 500s. That is too much.'

We need to change this and produce the opposite effect. Remember what we said was the desired situation: customers thinking that buying from us is a no brainer.

Here is the solution I came up with:

- We introduced two more offers, next to the single test.
- One of them was a decoy, that we did not expect people to choose.
- Three options is fine; more would start to complicate things, as users would need to crack their heads to make sense of them.
- Visually, we presented one of them as 'the recommended one' (you have probably seen this many times when choosing a subscription plan).
- One offer was 'normal', one was 'great' and the other was borderline ridiculous in comparison to number two.

In the first test I included:

- First offer: 1 test, 150 dollars.
- Second offer: 2 tests, 250 dollars.
- Third offer: 4 tests, 550+ dollars.

(I am not using the exact prices, because these are real cases and I want to keep them anonymous, but they are close enough.)

Initial results:

- After two weeks, sales went up by a noticeable amount. Average order value moved from 165 to 230 dollars per user, a 40% increase.
- Nobody was buying four tests.

The client was really happy, but they still wanted the 'four tests bought' outcome. They asked to modify offer number two from two tests to three tests.

I was failing to explain that different offers produce a jump in price perception, and that moving number two to three tests would get users thinking ‘three or four tests are too expensive, so I will go with one test’.

We tried it. Over two weeks, average orders dropped from 230 dollars per user back to 170, almost the same as the initial setup.

Perplexed by the results, they were now more open to a compromise between business ambition and a realistic way to increase order value per user. We set it back to the previous configuration. It has been three years performing at a 40% increase.

Customers perceive pricing relatively. Deya Bhattacharya puts it well:

*“An item is perceived as cheap or expensive in comparison to the initial price point or to another item whose price they knew about first.”*

She also adds:

*“In the case of the iPad, the initial price flashed was 999 dollars, which registered itself in the minds of the customers. Then, when the price was revealed to be 499, customers felt like they had saved 500 dollars. In fact, none of the customers knew how much the iPad was actually worth. It was the initially high price anchor that made them feel like the iPad was a steal. Had the initial price flashed been, say, 399 dollars, customers would have felt like they were losing out, even though the final price offered, either way, would have been 499. This is why companies often present their products with two prices: a recommended retail price that has been crossed out, and a lower sale price next to it. Customers feel like they have scored a bargain.”*

Offers are not always about the biggest discounts. They are about how compelling they sound in the minds of customers, and how well we play with the sense of value when we present them.

A few rhetorical questions for you:

- What are your current offers?
- Are you presenting black and white scenarios?
- Is your offer presented as a massive wall that key customers need to climb?
- Can you create new, more compelling offers that break the black and white and play with price anchoring too?

One of my favourite lines comes from Lawrence of Arabia: ‘nothing is written’. Regardless of what your competitors offer, or what you have been doing all these years, you have the ability to create new experiences and

new offers aimed at a portion of your customers, delivering extra value and extra benefits beyond the sale.

## Chapter 4

# Traffic acquisition: bringing more users to your site

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Can we please admit this is what we want the most? It is the number one thing digital marketing has meant to us, right up to today. So how come, being the top priority in most business owner and marketing manager polls, traffic acquisition is not at the top of this book?

Here is why. For the past 20 years we have been counting on professionals to manage all these shenanigans for us. Even at the risk of neglecting good learning, or of putting our business at the mercy of an agency we do not fully trust, we have been giving this area away in a big way.

Now, some of you (as I did myself at one point) would say: 'but I actually have my hands on some of our campaigns, I'm in control of what's done, at least the creatives and launch dates for paid ads'. That is great to hear.

The intention here is not to say 'you do not need to work with agencies or professionals in this area'. On the contrary, after all this context I hope you can work even better with them. It is all about the learnings.

Nobody will ever understand your customers the way you and your team do. No matter how well an agency or consultant claims to know your audience, or says 'I worked in similar industries before', your company is unique. The way you work, the people you work with, the specific selection of products and services, all of that makes it unique.

The idea behind this chapter is to give you a good landscape and an overall understanding of how you should look at paid ads, organic traffic and all the rest. Each plays a big role in your organisation, but always within a defined context.

Please remember that marketing agencies love to say everything is achievable with more visits and more traffic. They do this for a few reasons you will not usually hear from them:

- Launching ads is almost entirely under their control. They do not have to ask you for permission every time they test a new ad (and when they do ask, it is only a small part of the process).
- They can automate their processes. No matter how different and unique each business is, agencies can replicate the same approach to identifying, reaching and messaging audiences.
- They can scale this, with good margins. It takes almost the same effort to run ads for a 5,000 dollar client as for a 25,000 dollar one.
- They avoid touching your website which, let us be honest, is probably messy and sensitive, and could break and cause them infinite pain in the process.
- They avoid subjectivities. No different designs or colours for clients to spend extra energy choosing from.
- It produces tangible results, in most cases.

I work with clients who have ditched agencies after bad experiences. I also meet marketing managers who ask me, frequently: 'Jim, what's best: an in house team or external help?'. The reality is this.

If you have never worked with Google Ads, Facebook Ads, Instagram, TikTok, SEO, ad placements on key sites, and so on, my advice is to try launching one of these yourself. It will give you a real sense of what is involved, what levers exist, what can easily be achieved and what will require expert help. Once you have that sense, managing and working with agencies becomes so much easier.

The bottom line is: at the end of the day, to scale your business you will need expert help. Whether they run all ads and SEO for you, or train your in house team from time to time, external help will be a must.

The reason is simple. You cannot learn everything there is to know about each platform and be a pro at it, while also running a business and managing other marketing aspects. The more you know about your customers, about ads, and about the results you are getting from them, the better the questions you will ask the specialists you interview.

The challenge is:

- Finding the right partners.
- Getting a solid roadmap.
- Finding what works and what does not.
- Maintaining operational costs through the whole process.

I am with you, too many things to manage. But there is a way out, and I believe it comes with understanding.

## **The new landscape**

The landscape has been changing since August 2015, when Google reported that for the first time we had more mobile users than desktop users worldwide. The shift accelerated with the unsavoury Covid 19 pandemic.

Users now have a smaller screen, but your offers and site content have remained the same. If frictions and noise were already impacting user experiences because of a lack of clarity or a lack of motivation, now your users are really experiencing, and suffering, that even more.

Agencies will go out and generate web traffic for you, but they know most of it will come from mobile devices. So the number of people who would potentially buy from you, for every 100 visitors, has gone down compared with similar scenarios years ago.

That has created countless awkward situations between agencies and clients. Agencies show up with 'look, we had some sales', while most clients show understandable discontent because margins keep getting thinner and thinner.

There is a solution to this nightmare of expensive ads, but it will require you to step in. The good news is that it will change the way you do marketing and it will bring better services to your customers too. Before we get there...

## **Let us get back to the white room for a minute**

The best way to move forward is to go back to our safe, controlled white room, with a potential customer on the left, a product or service in the middle, and our business on the right.

How we approach the prospect on the left sets the initial motivation levels. For example:

- Have we interrupted that person to show something we wanted to show?
- Have we found this person because we have some initial data and we know she is looking for a solution we can provide?
- Do we have clear intentions for what we realistically want to achieve with our first contact?
- Is this the first or second time we meet?
- Has this person heard about us before?

Depending on the answer, this is either a person who will pay little attention to us, or someone who will be more than eager to hear what we have to say. The more we know about the intended target, beyond their simple quest for a solution, the better the offer and the experience we can craft.

It also helps if we know which channel (or room, in our example) they are in. So far, nothing extraordinary, right? Great. It does not need to be extraordinary in order to work.

Things get more complicated when the initial variables pile up:

- Different people to target.
- Different channels (paid, social, traditional).
- Different buying phases: 'I don't know I have a problem'; 'I'm aware of my problem but don't know who can help me'; 'I'm aware of both, but want to confirm or decide if I will go with you now'.
- Different levels of familiarity with your brand.
- Different messages, different offers.

The more you know about your audience, about their aspirations and their life beyond your products and services, the easier it will be to manage these variables and selection processes. And no, you are not supposed to chase every type of audience out there. Start with the ones who are buying from you the most, the ones you already know are your best clients.

## Let us assume we know about them

Assume we have an intended channel or channels already in the works: Facebook ad campaigns, Instagram ads, a few Google Ads. How do we deal with the variables we just listed?

The answer is a powerful word we will use more from here on: **intent**. Knowing the audience's intent helps us gauge what we will see in more detail in the funnel section: essentially how interested and motivated the user is, and how familiar they are with your brand.

For example, let us say we are launching a TikTok campaign to position a new jewellery product line:

- We expect most of these people will not know about our brand.
- We expect most of them will not be aware that they need jewellery.
- We expect most of them will click, watch and go away.
- We also expect some will share with partners or friends.
- We also expect some of them to be able to buy within one visit.

Can we go further? You can always go further. See how you can add depth to the same campaign:

We are launching a TikTok campaign to position our new line of Latin American style jewellery.

- We expect to captivate the Latin American audience who now lives in the United States.

- We expect that friends of Latin American descendants will share these items, or buy them as a gift.
- We expect to run this campaign just before key Latin American celebrations.
- The offer we prepare is designed to grab this newly sparked ‘what is this about’ intent and turn it into a good experience, so we will have special discounts for them.

Then we get the clicks. Whether it is from a generic campaign or a deeper one, we have made a promise to someone, and now we need to fulfil that promise.

The effectiveness of these campaigns is not judged purely by the number of sales we get. If we send users to a product page, we are implying their intent is high and they are ready to buy. If we send them to a category or product page, we are implying these users have not yet chosen a product and may want to explore the brand.

If you run a service campaign and send users to a page with a ‘contact us’ form right up front, the implication is the same: we assume their intent is high enough that they are ready to buy. But are they?

Another example. We are launching a Google Search paid ads campaign. We offer plumbing services in the Melbourne area. The ads are straightforward: we convey that we are reliable, affordable, local, experienced. We also target the powerful keyword ‘plumbing emergencies’.

- We expect users from local areas in Melbourne, Australia, to recognise our brand to some extent.
- We expect to capture a high level of intent: these are users actively looking for a solution and they do not yet know who to contact.
- Because of that, we also expect them to have five browser tabs open with several competitors.
- Knowing this, the first five seconds they spend on our landing page are critical.
- Emergency services also mean they are willing to forgo the ‘cheapest’ option. What matters in an emergency is how fast you can respond, how fast you can service them, how close you are, and how experienced you are with these emergencies.

Google Search ads are high on intent, as long as we do not misuse them and go too generic. How does generic happen?

If you type ‘accounting services’ into Google, you see a wide range of services. Here in Auckland, New Zealand, this is what I get: certifications, training, accountants, bookkeepers, small, medium or large businesses, local or not, fixed fee or one off. In the rush to capture attention, we end up

with generic ads. So generic, in fact, that we sometimes slip typos in (the last ad I saw said 'Exprt advice': I would not call that an expert).

Leave the generic ads for the big companies flexing their muscles trying to capture all the possible attention. Go for ads that guide users from the start.

Who are the clients these accounting companies really want? What do those clients have in common? Size? Type of requirements? What are their biggest pains? Accounting can be positioned around convenience ('let us handle the complexities of your business so you can focus on what matters most') or around savings ('we help you save every single dollar', aimed at affordable, small, struggling companies).

Traffic acquisition means we have a certain amount of control over how we engage with users. The more groundwork you do (the more you understand customers' pains and anxieties), the more you can play with intent levels.

What about brand oriented campaigns? The ones that are not focused on metrics like sales, but instead aim at brand awareness, increasing brand familiarity, and giving potential customers something to talk about?

In this book we are focusing on performance marketing, where we try to maximise every dollar you spend and get as much value back as possible. Big companies can afford dedicated brand marketing just to let people know they exist. We have a harder path: branding campaigns can become an expensive luxury. There are alternatives where you can do both, aiming at sales while also building good word of mouth, but that requires going even deeper, and we will probably leave it for the next book.

By now I am sure you have questions. That is great. The more you can visualise your own business and your customers, the more you can scrutinise the content of this book in order to see how it applies to you.

## **More than one way to get traffic to our site**

We end this chapter by recognising that we have more than one way to get traffic to our site.

**Organic traffic:** mostly from Google. Split between branded searches (people who know our brand and are trying to get back to us) and problem aware but not solution aware searches (people who do not yet know we can help them better than anyone else).

**Paid traffic:** split between cost per click and impressions. CPC is far more controllable, normally aimed at higher intent. Traffic from CPC is more targeted, so our messaging and landing pages can be a better match. It is also split between branded and non branded traffic. Impressions are the

audiences we interrupt with our ads. They might have no interest at all, they might not be problem aware, and worse, they might not be in the right time and place to see our ads. Like a private school ad showing up on one parent's phone two seconds before the traffic light turns green and they have to start walking again.

You also have the ability to segment and target people who have already visited your site. Those are the pesky ads that follow you everywhere after an initial search. We call them **retargeting**. Overall, expect a low intent with these: traffic that lands on your site and leaves quickly. That 'quick leave' is called a **bounce**, and with this type of ad you will see higher bounce rates (70 to 95%).

**Referral traffic:** other sites that have a link pointing to yours. You might even have more than one of your own sites pointing traffic to a second site. Overall, referral traffic should have a higher level of intent than impressions, because someone is using their own trust to recommend you. The quality depends on the source and its own traffic. A well regarded, impartial blogger will do wonders for you if your site is well positioned and those users come in already knowing what you do, how you can help them, and, more importantly, trusting you.

**Direct traffic:** when you use Google Analytics, you meet this type of traffic a lot. It means users are supposedly typing the URL directly into their browser. In practice, it often means something else:

- We do not know the true origin, either because they left the tab open for hours or days, or because of other technical reasons.
- We have our own issues with tagging users. A typical example is when users go to a payment platform and come back to your site: many times the setup is not right and we lose track of the origin.
- 'Dark social': users share a link and copy paste it directly into a browser.

**Mail traffic:** the highest intent of all, by far. There is a reason marketers keep insisting on using email and growing databases. It still works.

**Other:** text messages on the phone that turn into clicks, coupon QR codes, anything else.

Because of the different natures, the level of intent will depend on the type of marketing strategy you use. What if we use several of these, or at least more than one type of traffic? How do we manage all those levels of intent in a way that makes sense? That is when funnels come to our aid. I will show you what I mean.



## Chapter 5

# Funnels: what they are and how to use them

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The traditional idea of a funnel, from a marketing perspective, has been around for ages. The underlying paradigm is this: users are not all equal when it comes to their journey. Some are more ready to buy than others.

Let us quickly recap how types of traffic break down:

- **Cold traffic:** people unaware that they have an issue or an opportunity. If you offer tourism packages, these are the ones not even planning a trip. If you offer a service or product to solve or improve their lives, they are unaware of what it can do for them. They are new to your solution and new to your company. As cold as cold gets. We also call traffic 'cold' when people are aware of their problem or need but have no idea how to fix it. Think of someone with back pain who has no idea how to treat it or who to see (a physio? An osteopath?).
- **Warm traffic:** people who know they have a need or problem and are also aware of how to get an answer, but are still deciding 'who is going to solve this for me?'. Think of a car mechanic, a dentist or, when it comes to products, 'which brand or company will deliver the best solution for me?'. These guys may have bought from you before, so at this point we start seeing some level of brand familiarity.
- **Hot traffic:** they know what products and services you offer and, in some cases, they know your brand quite well. They are product aware and may also be aware of your pricing and offers.

On top of this we have what we call different levels of intent. This is an important word we will use to describe each individual campaign or traffic source. How do we define and exemplify it? Let us take a closer look.

Users coming from those different types of traffic (cold, warm and hot) are after different things at different moments. Each time a user visits our website, they do it for a specific reason and therefore show more or less intent to engage with us.

Typical thinking from users when visiting websites:

- User #1: 'I'm not looking for anything specific, just saw the ad and I'm curious about this.'
- User #2: 'I might want something like this in the future, so I'm starting to scout and learn what's out there before buying.'
- User #3: 'I realise now that I could go with this kind of solution for something that has been bothering me, so I'm starting to look at providers.'
- User #4: 'I definitely want an answer to this need. I've talked with friends, I know what I need, but I don't know yet who can help me.'
- User #5: 'I need a solution. I need to rent a venue to organise my kid's birthday party before August. I'm looking at solutions according to my budget, location and party needs.'
- User #6: 'I saw your promo before and now I'm considering buying from you. How fast do you deliver? Do you even have it in stock?'
- User #7: 'Where's the book now button? I need to book your services as soon as possible.'

There is a massive difference between the first user and the last one. If we wanted to improve our sales right now, we would go straight for users 6 and 7. While we group traffic into cold, warm and hot, breaking down the levels of intent helps us pinpoint with more accuracy the kind of motivation a user has.

For example, when someone searches 'how to clean my car windows?', there is awareness of the issue but little awareness of the solution or the potential providers. The level of intent is mild. But if the same user searches for 'car wash near me', the intent is higher because the user is going for something more specific.

## **Intent, right... what's next?**

We discussed before how important it is to align offer, user and web experience. Funnels exist to help us with that effort, by giving us a controlled experience where we can manage each channel and each level of intent with the right content and the right landing page.

Let us talk about this, because it taps into a fundamental belief about websites: we tend to assume websites should work like flea markets, with users finding their way around by themselves. So we send them to the homepage or to other generic pages and from there 'off they go on their own'.

As always, the real world has good examples of someone else optimising customer experiences in order to influence behaviour. I am talking about supermarkets.

Have you ever thought about supermarkets? They have such a level of behaviour optimisation that, without you noticing, they influence where most customers go, what they see, how long they walk, and, more importantly, where their journey begins.

Take a look:

- There is no notion of day or night inside a supermarket (the same as casinos, this is intentional). It is better if customers lose track of time and stay focused on shopping.
- Dairy products are always at the farthest point from the entrance, even though dairy is one of the top daily products. The intention is to lead customers down a longer path where they can be influenced to buy something else.
- There is always one main door. It is not only for security, it is to establish an initial path where you have a better chance of influencing customers and their purchase choices.
- Retail heat mapping: products at the top and at the bottom of the gondolas get the least attention, so supermarkets use the middle as premium shelf space.
- Heat mapping also operates at a more sinister level. I have met software engineers who develop tools that allow supermarkets to 'play' with customers' phones. The software pings phones that are looking for a Wi Fi signal and produces a real time heat map of the floor.
- This allows supermarkets to modify gondolas, paths and configurations to ensure they have the best floor design, and to recognise where to put their hot products.

There is more, but the point is clear. They could not do that with a flea market configuration.

The same applies to your site. While it is not always ideal to have users moving exactly one step at a time, you can definitely set up an entry point for each type of traffic, matching their intent and the promise that brought them in, and then leave breadcrumbs that influence them towards the next desired page.

On e commerce sites, we often hear 'no, it's better to land users on category or product pages'. That misses the opportunity to bridge the initial promise, the level of intent and the content we deliver. We will look at the specifics of a landing page in the next chapter, but suffice to say: you should always start a funnel with the most specific landing page you can put

together, for the share of traffic sources most likely to convert.

Don't let your users roam free. Always lay down a path for each type of web traffic.

## From funnels to customer journeys

You have probably seen this many times:



*Source: pixelme.me, by Tom Benattar.*

The idea is that you send people to:

- **The top of the funnel:** landing pages that are not pushing users to buy straight away, but instead aim to make the user familiar with you and your solution. There are a few exceptions that I will explain below.
- **The middle of the funnel:** users who are aware of their own issues but do not yet know if you are the one who will deliver the solution.
- **The bottom of the funnel:** hot traffic, recurrent customers, users who are close to or ready to buy.

Can we, in some cases, take cold traffic and turn it into a sale or a lead in one go? Yes, in a few cases. It has to do with the cost associated with the purchase. For example, an Instagram ad shows a cute face mask for teenagers at 10 dollars. Even if you are not familiar with the brand, the price is not significant enough to spend three weeks thinking about it. If you do a good job on the landing page, you have a good chance of getting sales right from the get go.

You are probably wondering 'how do I put all this into action?', especially when you have a site that is up and running and probably a bit of a mess. I work every week on sites of all sizes. There is always a way to start, and steadily bring order to chaos.

## It all starts with mapping the customer journey

Take a look at your overall traffic and grab the five most important traffic sources, with their respective current landing pages. Those five top landing pages are the current point of origin for those potential clients.

Then, for those traffic sources:

- Classify them as cold, warm or hot. Pay attention to the promise each channel is making. Even Google organic traffic makes promises: each meta title you see in the search results is a promise to a user.
- If you have 'direct traffic' as a channel (based on what Google Analytics shows), avoid using it as a reference. We will see later that direct traffic is not really direct.
- Start drawing your findings. There are simple tools like Funnelytics or Geru that let you create a view of your current website flow.

In the example below:

- We have identified the top landing pages: in this case three (homepage, product page and featured collection), since this is an e commerce site.
- We added the traffic sources, and we can see a Facebook campaign bringing users to the homepage, together with organic traffic and paid Google ads.
- An email campaign is sending traffic to the featured collection, and another Facebook campaign is sending traffic to one specific landing page.

[ figure ]

*Mapping your customer journey: a snapshot of how the site looks right now.*

In this example we can notice the following:

- Organic traffic cannot easily be controlled. We will always have organic users landing on the homepage, and that is fine.
- Paid Facebook ads sending users to the homepage means we are potentially sending cold traffic to a generic page. These users may not even be aware that they need our services, and here we are, telling them who we are and what we do, but not what is in it for them. It would be better to send that traffic to a tailor made page that entices them with what we can do for them.
- An email campaign to a featured collection sounds good. You entice users about the benefits of those products via email, and then let them jump straight to the section.
- Google Ads to the homepage: this is where things get tricky. It might show a good or even a high conversion rate, but if you split that traffic between branded and non branded campaigns, the data will tell a different story.

Quick reference: branded terms mean the user has used your company's name as part of the search query, like 'Lumino dental services in Auckland'. Users who already know your brand and land on the homepage will obviously be easier to convert than those who have not searched for your company by name in the first place. Their level of intent is quite different. That is what we need to pay attention to: drive the right type of traffic to the most suitable page.

As a next step, we create another funnel and customer journey, this time with the desired model, even though we have not built it yet.

## **New and proposed funnel**

What are we doing differently here, compared with the original funnel?

- We created two new landing pages. One is a top of the funnel page for the casual Facebook traffic, designed to entice and inform. The other is a middle of the funnel page for the Google Ads traffic, which has higher intent, and which focuses on 'why us, why now'.
- We defined a Facebook campaign as 'retargeting'. Because it addresses the bottom of the funnel, we can let users go straight to the product page, since they have already been enticed and informed about what we offer.
- Organic traffic continues to land on the homepage, the email campaign and the second Google Ads campaign continue to land on the collections page.

A simple set of changes can virtually revitalise the way your website works. Something else many marketing teams miss with this configuration: cleaner traffic allows for easier and better analysis.

How do we know what works and what does not? In the first scenario we had a mix of white rooms, where we were saying the same thing and showing the same offer to all kinds of users at once. What a mess.

'But I don't do e commerce, I do leads or bookings or registrations: how does this apply to me?' The principles are the same.

Let me show you a real example. We worked with a large organisation that was concerned about users not completing a registration process. Conversations would go: 'this campaign converts, or it doesn't'. There are almost no blacks or whites in marketing. Talking in absolutes diminishes the power of the small percentages, of the nuance between 'they clicked the ad' and 'they reached the thank you page'.

The funnel and customer journey mapping tool is great for bringing real awareness of the actual scenario. Just look at this example. These are two representations of the same website.

[ figure ]

*What the conversation was about: campaign, landing page, thank you page.*

[ figure ]

*What the real scenario looked like: to register you need to complete seven steps in that form. A much longer path for users to convert.*

Now we can see that it is not only about promises, traffic sources and how we match them. It is also about the levels of friction users encounter. We need to understand that, the moment a user lands on our website, they are about to climb a mountain to reach a sale or conversion. We need to ask ourselves: are we creating an Everest of frictions for them?

It is not just a matter of reducing the steps, although that often helps a great deal. It is also about:

- Giving users control. Tell them roughly how long it will take to complete the steps, how many steps there are, and what information they will need.
- Giving them motivational reinforcements: 'you are almost there', or 'join the 250 happy customers who have already booked for this event'. You can also add specific testimonials that address their perceived frictions and objections, such as 'I was hesitant to fill out this long form, but I couldn't be happier with the outcome. Guys, this is worth it, keep going.'
- Letting them know what happens after they press 'submit'.

Map your site. Highlight key pages only. You can use a whiteboard, paper, a drawing tool on your computer, anything you like.



## Chapter 6

# Landing page optimisation

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I remember hearing about an underperforming campaign for one of the agency's top clients, who was spending many thousands of dollars a month on ads and could potentially spend much more if those campaigns were good enough.

The level of concern was high. The agency was not in great shape and clients of that calibre were rare. We needed to keep them and deliver for them in any way we could.

By that time, the end of 2017, I had been around the industry long enough. I had worked on so many landing page projects over the years, and I thought: 'this is a good case to try the best of what we know about landing page optimisation (LPO).'

Normally, agencies are reluctant to try new processes on existing high value clients. The situation was dire though: ever since 2015 paid ads had been steadily increasing the cost per click, and you can imagine how much that has changed since. Because of that, I got the green light: 'OK Jim, try whatever you think can help.'

I mentioned earlier that no matter how big or complex campaigns are, you can always go back to basics. So that is what I did. I created an imaginary white room and placed the intended audience, the offer and the landing page in it.

The company delivered emergency electrician services in Australia. I mapped what a customer would need to see and to be told, when they had an emergency, and then compared that with the existing version. I created new copy, improved the layout over what was already there, then tested it again and again.

Over three months I probably tested about 20 sets of changes. Thankfully, the site had so much paid traffic that we could test fast. (More on tests in the final chapters.)

What happened? A 95% revenue increase.

Magic. Or rather, no magic at all: just hard work and a lot of fighting back against every itching bias along the way. Let me show you what I mean.

[ figure ]

*Before and after, the same traffic landing in both.*

Main differences:

- **Decluttering:** we removed everything that was not relevant to a prospect with an emergency right now.
- **Focal point:** we centred attention on the main CTA button ('Call now').
- **Format match:** we researched and found that more than 90% of users were calling rather than filling in a form (which makes sense in an emergency), so we removed the 'book online' form.
- **Visual noise:** we removed several distractions, such as yellow squares.
- **Congruence:** we removed the 'we also do plumbing' content from the bottom, in order to keep the focus of the landing page consistent throughout the copy.
- **Mobile design:** we cannot show it here, but we translated the same experience to mobile, with a custom design for that page.

The end result was an 88.83% increase in conversion rates and a 95% increase in phone calls. Conversion rates were originally at 6%, which is not bad, but in this vertical clicks are extremely expensive (over 50 dollars per click), so the campaign needed conversion rates above 8% just to start being profitable. By the time we finished, the conversion rate was oscillating between 12 and 13%, with a very happy client who immediately asked us to do the same for the whole plumbing area.

Landing pages can be a game changer. When I first discovered this topic, back in 2009/2010, most definitions of a landing page were variations of 'it's where web traffic lands'. That is it.

Thankfully, I got my hands on a book called 'Landing Page Optimization' by Tim Ash, from 2008 (ages ago), which still holds great principles to this day. That was the first eye opener. Then a fellow called Oli Gardner (creator of the landing page builder Unbounce) started to release a series of guides about landing pages that I put into action with great results.

In the following sections, I will do my best to summarise what I have been learning over the past 10 years, building or helping to build more than 500 landing pages, at the very least.

## Landing pages begin with context

A classical error is to systematically disregard the white room: the promise being made, the type of traffic landing, and what users expect. On top of that, disregarding what is going to happen *next* is also very common. Will the user have to fill in seven form steps to complete a booking?

The landing page we are building is going to be validated by the number of conversions that come through it. But what happens if those conversions are blocked by frictions that come *after* the landing page?

A while ago we put together a landing page for an Australian metal scrapper company. The owner called us to complain about the 'low number of conversions', so we jumped into analytics to see what was going on. Conversions were at an all time high. They were the highest these guys had ever seen.

We communicated this and got back: 'I don't believe these numbers of yours'. From the client's point of view, the agency was making them up, because he could not see many deals coming through the door.

While in the middle of an argument with a client (which is always a lose lose scenario), we sat back and studied the journey, step by step. When we got to the phone call, we said: '...and then they call and a person from the company turns them into sales.' The minute we said that out loud, there was a pause: 'but what if there's an issue there?'

Luckily for us, the client also had a service that recorded phone calls. (Recorded calls provide so much context and qualitative input, I would recommend this to every company that uses the phone for sales.)

When we listened to the calls, it was clear the person on the other end was not in any mood, was very aggressive towards customers, and was even arguing with them. We showed this to the owner. The matter was handled internally and, voilà, conversions started to show up.

The same thing happened at a private school with a 24,000 dollar yearly tuition fee. There were dozens of leads, yet the school was reporting fewer than 10 enrolments over four months. Reviewing the process and mapping the customer journey solved the little issue: the secretary was not following up on the leads, leaving all the requests to one side because 'that was a lot of extra work' she did not want to do. Suffice to say she was no longer working there a couple of weeks later.

The first lesson with landing pages, the one nobody tells you, is that there is a *before* and an *after* for each one. If you want to succeed with your landing page, take care of both. Make sure you know exactly which KPIs to aim for, which metrics serve as signals (time on page, how far users go through the site after landing there, what they do, what they click, how much they scroll).

## **There's a process to follow**

I have had the pleasure of working with many marketing teams. One of the things I always recommend avoiding is buying landing page themes off the shelf. The ones that say 'optimised for conversion, the best design' are not optimised. They do not know about your specific audience, where they are in the buying phase, or what they need to see. For that reason, they tend to fail miserably.

Instead, follow these steps:

- Decide which sections you need (remember the importance of the landing page goes from top to bottom).
- Write the copy needed for each section.
- Create a mockup, then add the images and the design on top.
- Optimise it for mobile. Responsive is not enough. Make any change mobile users need, regardless of what the desktop version requires.
- Run user testing. We will see this in the testing chapter; in short, you put the design in front of random people and watch their reactions.
- Set it live and test.
- Adjust where needed, until you reach a ceiling where the conversion rate cannot be improved further.

## **Sections: from top to bottom**

The 'above the fold' section of any website (on both desktop and mobile) is the first screen a device shows. It is the bit of content users can see without scrolling or clicking. This section always has a defined function:

- It provides continuity from the promises you made (such as ads).
- It needs to communicate, clearly and concisely, what this page is about and who we are.
- It provides an invitation, an offer.
- It shows what to do next.

Users scan before they read, and they will spend one or two seconds looking at the area above the fold. If they like what they see, they stay a bit longer.

Our first job with a landing page is to earn their attention further. To set a good hook and grab the visitor's interest so they scroll on. The sum of what we just listed is what we call a value proposition. Within it, we position:

- Unique selling propositions.
- A sense of scarcity.

- A sense of urgency.
- Calls to action.

On average it takes about three hours to put together a compelling value proposition, and 30 minutes to bring all the design pieces together. Never underestimate the power of copy. There are studies showing that copy is a 2x factor compared with design when it comes to conversions.

How do we put it all together? What do we need to keep in mind? A long time ago Oli Gardner from Unbounce gave us a useful framework.

## Seven principles of conversion centred design (CCD)

Remember the example of the emergency electrician? Removing all the clutter, focalising the CTA, keeping consistency: those are part of conversion centred design (CCD).

Think of it like this: every single element should support one desired conversion, and nothing else. Everything else is a distraction.

Even though we want to give users 'several options' to choose from, we are actually adding 'weight'. Focus on what is important instead.

A summary of CCD:

- **Principle 1: Create focus.** The foundation of CCD is focus. Learn why it matters to focus your audience on one goal at a time, and how design can hold their attention.
- **Principle 2: Build structure.** Structure your page to influence visitors and guide them to action. Design your information hierarchy and set up your page layout.
- **Principle 3: Stay consistent.** Keep your pages consistent with ad matching and design guidelines to bring in more conversions.
- **Principle 4: Show benefits.** The images on your page are not just for show. Choose visuals that showcase the benefits of what you are selling.
- **Principle 5: Draw attention.** Use design to draw attention to the elements that matter most. Attract visitors to your CTA buttons using colour and typography.
- **Principle 6: Design for trust.** Create social proof such as testimonials and customer logos to build visitor confidence and prove credibility.
- **Principle 7: Reduce friction.** Make it as easy as possible for visitors to convert. Optimise your forms and your mobile pages to create a seamless experience.

Source: <https://unbounce.com/conversion-centered-design/>

## New versus existing pages

Do you need to start from absolute scratch? More often than not, an existing landing page is already converting. We are dealing with budgets, campaigns and people's jobs every time we manage websites, so let us please agree on this:

**We should always look for ways to minimise the risk and the uncertainty of any new digital asset we publish.**

Landing pages can be sensitive pieces, so make sure you can send a small testing percentage of paid traffic to a new version, instead of all the traffic at once.

When it comes to conversion optimisation, we call this revolutionary versus evolutionary pages. Go for evolutionary every time you can. Starting from scratch always carries more risk and, besides, the existing design is already part of the brand. Chances are you do not need to reinvent the wheel.

Think back to the example above. The template was almost the same. We just made things cleaner, clearer and more congruent, but the base of the design was already there. Even more often, the copy is fine, just misplaced, with the wrong format, buried down the page.

I am a great advocate of website archaeology. It also minimises resources and saves precious time.

## Types of landing pages

I often hear 'but I have an e commerce site, we don't use landing pages'. It is not about a trend or a fad. It is about the white room, the relevance of the promise, and the way we influence traffic the same way supermarkets do. E commerce sites are already using 'landing pages', just not dedicated ones.

These are some of the types of landing page I have had the pleasure of working on:

- Lead generation (for many different industries).
- Newsletter signups.
- New product showcases.
- App launches.
- Bookings (car rentals, hotels and so on).
- Applications: a mix between bookings and lead gen, for finance, non profit causes and more.

Landing pages for the top of the funnel, the middle of the funnel, the bottom of the funnel, you name it. Some of them sell a product from the get go.

Some of them turn something invisible like ‘awareness campaigns’ into something more tangible, such as ‘they downloaded this PDF with product offers, and we captured their details in the process’.

## Long versus short landing pages

Back in 2012 I was of the opinion that ‘landing pages should be short, to the point’, and ‘the shorter the better’. Years later I learned that the length of a landing page is closely tied to the context of what you are trying to accomplish.

For example, in the UK, Olly Richards offers his own way of learning different languages. He provides a series of online courses. On his page ([storylearning.com](http://storylearning.com)), if you go to any of his sales pages you reach an extremely long landing page. So long, in fact, you would think ‘is this even working?’. The answer is yes, very well indeed. Together, those pages produce 8 figures for his business.

Why do some long landing pages work? First, the traffic source matters. In this case we do not have casual Facebook ads going to those pages: most of the users are coming from emails, previously collected through blog posts and other content. Intent is high.

The landing page for those campaigns acts as a ‘profiler’. It is a funnel in itself. It takes high intent users and, by the time some of them reach the bottom, they have moved from warm to hot. The whole landing page addresses and anticipates anxieties such as:

- Is it easy enough for me?
- What are others saying about this?
- Can I afford it?
- Do I trust Olly Richards?
- Do I like his way of teaching?

He takes his time explaining all the reasons why people should buy from him. It is a very specific case. In most scenarios, a long landing page would result in users not even reaching halfway down the page.

At the end of the day, it is not about having a long or a short page for the sake of it. It is about understanding the type of traffic you have and what you are trying to get those people to accomplish in one visit.

Are you trying to take them from cold to hot in one go? Are you trying to get leads from a picky group of people, or are they casual visitors? The more you understand your audience, the better you group them, and the more clarity you will have about the right level of information needed.

But you have to start somewhere. When you are creating the landing page sections, just think of all the areas your intended audience needs to see, from top to bottom, from most important to least.

## **What about the copy?**

Different from branding, social media, newsletters or blogs, the copy for landing pages (or for any key webpage) needs to be quite specific and to the point. It needs to understand the tone, the words your customers use. It needs to anticipate the anxieties and objections users will bring to the site.

It also needs to understand the motivation levels people will have. Are they casual visitors? Or are they arriving already hyped?

The same copy requirements for a landing page also apply to other key pages, such as a homepage, service page or product page. When we talk about 'designing' a landing page (or any page), we are referring to that whole process: sections, copy, wireframe, mockups. Let us look at this in more detail in the next chapter.

## Chapter 7

# Design: putting together solid web pages

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The process is always upside down. When clients go to web designers, they buy the new design by its looks. Themeforest, the well known site that sells design templates, does not sell for 'conversion': it sells for our eyes. The same happens every time we engage with a designer: naturally, for them, we are the client, so they aim to produce what we like or find attractive, rather than focusing on what our customers actually need.

It has to do with our own ego. We want a site that looks good. Not only for our company, but also for us, so we look good in front of colleagues, bosses and board members, you name it. We can tell ourselves that this is not the case, that we are 'focused on results', but I would not dismiss our own impulses so fast.

Instead, I propose that we build something that accomplishes both: a page that is robust for conversions *and* looks good enough to make us all smile.

There will be compromises, though. Unless your brand really needs to evoke a certain style and aesthetic as part of the purchase process, the default is light and minimalistic. We put more emphasis on a clear, readable design, easy to see and access, rather than bringing in bloated functionality that serves no purpose other than inflating our egos.

I want to bring up the conversion optimisation pyramid we normally use when assessing websites. It was put together by Craig Sullivan from OptimiseOrDie, an expert on website conversions from whom I have learned a lot.



[ figure ]

*The conversion optimisation pyramid: from accessible at the bottom up to ‘marketing whiffle’ at the top.*

As you can see, looks and feel sit at the very top, colloquially called ‘marketing whiffle’. The most important thing about any design is that people can access it, load it, and view it.

We may take it for granted, and designers will say ‘no worries, the design will be responsive’. That is not enough. From inception, we need to make sure we have solid versions for both desktop and mobile. Whenever a designer presents you a desktop version, please ask them to show you how it looks on mobile.

We also need to take into account that ‘users can view it’ also means ‘they can read it’:

- Font size matters significantly. Use generous sizes.
- Format matters. Use enough whitespace; don’t crowd your content.
- Buttons should be big enough for a finger to press them.

We will go into more detail in a moment. Before we do, let me remind you of mobile a bit more.



*Source: LukeW (Ideation + Design). Thumb reach zones on mobile.*

When designing new pages, always remember this. Anything at the very top of the screen will require the user to stretch their thumbs to reach it. Our designs need to adapt to this, rather than asking users to adapt to our ideas.

Now that we have some of the pillars to take into consideration before putting a design together, let us go to the actual build.

## Steps

We mentioned some of these steps in the landing page section. Let us go into more detail now.

## Starting with sections: what do we need first?

How do you decide what goes where? What is most pressing or important?

On most types of pages, you need a value proposition to start with, so unless you are designing a product page or a cart page, every page should have one at the top. Even category and booking pages should have it. So

that is the starting point.

The hardest part is contextualising the scenario. Below is the kind of criteria we normally assess:

- Do they know about you? A little, somewhat, a lot? If little or somewhat, you will need credibility cues at the start.
- Have you promised them something specific before they arrived? Then we need to show exactly that, at the start.
- Are they new to your company and have not yet seen or fully understood what you do? A clean value proposition is required at the top.
- Can you convey what you do in one short video? Then use it to support the value proposition.
- Do you have good testimonials (short, relatable, insightful)? Bring them in too.
- What are your three to five top services or products? Prepare them with short descriptions. They will sit on the second screen, below the main banner with the value proposition.
- Do you need to talk a fair amount about what you offer? Prepare those paragraphs with a break every four lines.
- What is the action you want them to complete? A form? A button click? Where on the page does it make sense to place it? Do not be afraid to put the form below the fold: if your content guides users in the right direction, they will find it and use it.

## **Once you've put it together, let us tear it down**

Let us say you have a page recently created, each version with one specific goal. Your designer has taken the content you suggested and provided, and has put it together in an initial draft. Want to know if what you have is rock solid?

There is a process called heuristic analysis, where we apply a set of lenses to each page. We essentially tear them down by asking ourselves a lot of good questions.

I thought you would like to see what we typically ask when reviewing a page, so here is a good list, divided by heuristic area.

### **Relevancy**

Are we offering web content that matches what the ad promised?

- Are you giving prospects all the information they need in order to convert?
- Does my perception fit my expectations?

- Does the web page relate to what the visitor thought they were going to see? Do pre click and post click messages and visuals align?
- Does the headline match the page content?
- Do call to action buttons match the value they are going to deliver?
- Are the images on the page relevant to the content?
- If the user came from an external site (Google search, PPC, referral), will they recognise this as a continuation of their journey?

## **Buying phases**

What should we be asking cold, warm and hot traffic to do on each landing page?

- Is the customer supposed to buy on the first visit?
- Are visitors rushed to buy too soon?
- Are there paths in place for visitors at different stages (research, evaluation, and so on)?
- If the user is not ready to buy, do we help them in their research and evaluation process?
- Are there secondary calls to action to learn more about the product, in the key funnels?
- Is there an effective email capture process? Does it have a proper lead magnet?

## **Congruence**

Ensuring that every element of your page either states or supports the value proposition.

Is the value proposition itself:

- Clear and easy to understand?
- Does it communicate the concrete results a customer gets from purchasing and using your products or services?
- Does it say how it is different or better than the competitor's offer?
- Can it be read and understood in about 5 seconds?
- Does it avoid hype ('never seen before amazing miracle product'), superlatives ('best') and business jargon ('value added interactions')?

## **Clarity**

Can I understand what the product or service is, and how it works, in a reasonable amount of time?

- Where am I? What is this page about?
- What can I do here?

- How is it useful to me? Why should I do it?
- Are there supporting images or videos that help me understand it?
- Is the product information adequate or sufficiently thorough for me to make a decision?
- Are all important pieces of associated information clear (pricing, shipping info, warranty, return policy)?
- Is it clear what I have to do next?

Evaluating design clarity:

- Is there a strong visual hierarchy in place? Does it follow a most wanted action?
- Are less important things also less important visually?
- Is there enough whitespace to draw attention to what matters?
- Are the supporting visuals in place?
- Does the call to action stand out enough?
- How much top priority information sits below the fold?
- If there is more information below the fold, is it clear that they should scroll? Are there any logical breaks that stop the eye flow?
- Is the eye path clear?
- Is the body copy font size large enough for easy reading? In most cases the optimal size is 16 px, but it depends on the font.

## **Frictions**

Friction is the psychological resistance to a given element in the sales or sign up process.

- Does the page ask for sensitive information (such as a phone number)?
- Are there slow loading pages? (Linked to technical analysis.)
- Are features or content hard to find (search boxes or other functionality)?
- Does the site look spammy or amateurish?
- Does the page cause doubts or hesitations? (Expand on notes.)
- Does the page raise privacy or security concerns?
- Is the landing page using cheesy or face stock images?
- Does the page use complicated language, jargon and hype?
- Does the page have typos and poor spelling?
- Are there usability problems? (A menu that does not work, an item you click and nothing happens.)
- Is there low contrast between text and background colours, or poor readability?

## **Distractions**

Ideally, 'one page, one goal'. Everything else that does not contribute to the goal is a distraction.

- Are there moving or blinking elements such as banners and automatic sliders?
- Is the top header compact, or is it taking up too much valuable screen space?
- Are there visual elements of lesser importance high in the visual hierarchy?
- Is there copy that is not about the specific action we want people to take?
- For e commerce: in the checkout (conversion funnel) pages, are there navigation elements that could be removed?
- Which elements on the page are *not* contributing to people taking the most wanted action? How many of them could be distracting?
- What could we remove from the page without compromising its performance?

## **Credibility**

Trust elements that should be on the landing page:

- Privacy policies.
- Seals of any kind (use notes to comment on findings).
- SSL or HTTPS.
- Number of sales.
- Overall landing page design: does it feel like a legitimate site? (If not, expand on notes.)
- Customer lists (logos and/or photos).

Social proof:

- Testimonials.
- Social mentions (Twitter, Facebook, LinkedIn embedded posts).
- Photos (customers with products, for example).
- Videos (showing customers engaging with your service).

## **Motivation**

What incentives do we have for them to convert? Is the offer clear enough to turn motivation into conversion?

- Is there a clear, benefit driven offer?
- Do I understand *why* I should take action?
- Are features translated into benefits?

- Is it clear what people are getting when they click a button or fill a form? Is it something desirable or useful for the target audience?
- Is there enough product information?
- Is the content interesting? Does it use simple language?
- Is the sales copy persuasive?
- Could we apply some persuasion principles, such as social proof, urgency or scarcity?

That was a lot, let us be frank. I gathered this compilation of questions over the years. I do not remember every exact origin or source, and I have modified and added many of them along the way.

What is important to understand is that we use eight areas:

1. Relevancy
2. Buying phases
3. Congruence
4. Clarity
5. Frictions
6. Distractions
7. Credibility
8. Motivation

If you address these points on every page you build, chances are you will get a perceptibly better result than if you do not.

Once these are revised, the content and the design have a first draft, what do we do? We test it. More on that in the coming chapters, where we will discuss what kind of tests we should run, and how.

Do you share it with your colleagues, perhaps your friends? They all agree that yes, it is clear, it is nice, it basically works. The only problem is that they know what you do, they know your company, and they are on your side. Bias grows strong around us.

Our work then is to break that bias. We need to test the design, which is exactly what we will do in the testing chapter.



## Chapter 8

# Web analytics

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‘Our marketing decisions have always been data driven.’ We have said this again and again.

Marketing is so human oriented that it has always looked for certainties. And what can be more certain than something perceived as a hard science, like statistics and analytics? We do our best to reinforce what we believe is happening, with data.

There is nothing wrong with that, except that sometimes our own biases make us see what we want to see. Working with Google Analytics is sometimes like staring at the sky and making constellations out of random stars. Humans are great at finding patterns and explanations: we can quickly justify the ups, the downs, the lack of, and so on.

How can we properly use data to truly guide us? I have been asking myself this for a long time.

The first thing I can say is that data requires a good environment. Let me explain:

- How conditioned are you to avoid delivering bad news?
- How much time and effort can you or your team spend on Google Analytics each week?
- How patient are you? Can you afford to wait a month for data to be gathered?
- What about getting professional help with the most technically challenging aspects, like integrations?
- Is your data coming from a biased source? In some cases we have good levels of trust with agencies, but not always.

Those are the typical factors I notice when working with clients and agencies that affect our ability to access and use web analytics fairly. Add to that the technical complexity of subdomains, payment platforms, booking systems, embedded iframes, all with their own way of applying tracking codes, and we end up with a mess.

The newest version of Google Analytics, GA4, was created to try to sort most of these problems out, but it is still far from being a fully developed analytics platform.

The scenario is not always favourable. So what do we do? Far from giving up, far from letting this go, we move forward.

- Numbers and data take us where they take us. We always read the good and the bad news with calm, with a grain of salt.
- Good results, real results, take time. When a sudden up or down shows up, we will call it a trend. ‘The numbers look good, but we need more data to validate the results. So far we have started with a favourable trend’ is what I tell my clients.
- When something looks strange (a bounce rate of 100% or 0%, a conversion rate above 10%, or any key metric way off the norm), we need to flag it. If we cannot find the origin of the discrepancy, it is time to call in for help. Always have a Google Analytics expert contractor around.
- Data also requires investment to set up and revise funnels (we will see this in detail), to corroborate that everything is being tracked correctly. A good and healthy GA account gives you a clear direction, which is what your business desperately needs in order to know what is working and what is not, and where to put the money.
- Then there are agencies. We know they need to survive, and many times they act like the messengers who do not want to tell the king the bad news. So they retain that information (in the hopes of finding a good solution in the meantime), they hide it, they minimise it. I have also seen some agencies do the opposite: they come to you with the bad news and a solid plan to find the ‘why’, and they propose something new, quickly, to revert it.

## **Analytics with a clear purpose**

Google Analytics is, for me, a place I have visited so often, for so long, that it is more than a rabbit hole. It is a massive underground network.

The number one purpose I set for myself every time I go inside an account is: ‘go and take the information you need, and if other interesting bits of information arise, give yourself a fixed time and make the most of it.’ If you go into GA just to see ‘where the data takes me’, you will end up with loads of inexplicable, seemingly important information.

It is much better to run a checklist and go to the typical areas where key behaviours surface.

What are the typical things we will be after?

**Important metrics:**

- Goals and sales.
- Campaign performance.
- Traffic source performance (breakdown by source/medium).
- Average order value (AOV).

**Contextual and relevant information:**

- Gender and age.
- Device (mobile, desktop) breakdown.
- Pages and landing pages.
- Exit pages.
- Time lag (how many days, on average, it takes for users to buy).
- Path length (how many touchpoints, like ads, were needed to achieve a conversion).

Also:

- Assisted conversions.
- Top conversion paths.

Most of these, if not all, should be reasonably familiar to you. I invite you to go and check the ones you have not seen before.

What is not explored enough on GA, to my disappointment, is the use of funnels. Let us look at what GA can provide and at what you can do yourself.

## GA + Funnels

We talked about funnels at length earlier. How important it is to understand the points of origin, and to see how users go deeper and deeper on our site until they reach the point of conversion.

It does not end there. To understand who drops off where, we need to be able to do data breakdowns, using the metrics and dimensions mentioned above.

There are no blacks and whites in digital marketing, only percentages and groups. So we want to be specific, like knowing 'what percentage of people using older mobile phones, in their 50s, struggled with our booking form'.

We want to know how those email campaigns really performed: what did users coming from newsletters do? Where did they drop? How many completed the intended journey?

**Digital marketing is not about black and white, it is all about good questions.**

How does Google Analytics show that? Let us look at the current (but soon to be extinct) GA Universal funnel graphic and what you can do to improve

it.



*Typical funnel visualisation. Source: business2community.com.*

In this example, the funnel has been configured for a hotel (you can essentially configure these steps for almost anything you can track). Quickly, we can see where the red bars are, signalling the biggest user drops.

What about the breakdown we need? These are just averages put together. That is the first and final reason why this funnel never really worked: averages tell us very little. They bring nothing to the understanding of the 'who' and the 'why'.

Is there a better type of funnel around?

### **The shopping behaviour analysis**

Only for e commerce, unfortunately. Is it any good? It does come with segment capabilities at the top. With that option alone, you can discern between traffic sources, devices, locations and more.

The funnel reflected here is the checkout, which sits at the bottom of the funnel. What are the difficulties?

- While you can do breakdowns, they are quite limited. You end up creating a combination of segments to get the data sample you are after, like 'show me all paid sources that share the same level of intent, but exclude the others (such as display ads)'. You need a regular expression to make that work.
- It does not show what happens before the checkout. From landing page to checkout, there is a lot of missing information.
- If you have an e commerce site on Shopify, chances are you are not using the Plus plan and so you have been almost completely unable to modify the checkout experience. Watching users drop in an area you can barely do something about is a waste of time and a recipe for increased anxiety.

One more attempt at a good funnel. Is it possible at all?

## Enter the old and powerful horizontal funnel

By creating goals that are connected and dependent on each other, it is possible to create a custom funnel in the Custom Reports section of GA. This funnel is not pretty: it is full of numbers and zero graphics, but you can use segments and traffic breakdowns together. You can also track pretty much any funnel you are after.

Let me show you how it looks:

- At the top we have the segments, normally used to discern between different traffic types (organic versus paid, branded versus non branded campaigns, and so on).
- At the bottom we are separating the traffic between devices: there is a big difference in conversions between desktop and mobile, which is why we should always try to break this down.
- This is an example from a car rental company: we manually created the goals for the booking process.

How does it work?

- On the first step, we have 6,226 users who landed on 'select a vehicle'.
- The second column shows in percentages how many users dropped from step one to step two.
- 61.14% abandoned the funnel here, with a breakdown by device shown below.
- The third column shows how many users reached 'add extras'. From here, the funnel really starts working, because it is here where you can see the intent of booking a car versus just scouting for vehicles and pricing.
- You can then see the biggest drop, which means we lost another 82% who did not get to see the payment page. This is the most important area to improve. What happened with those users after seeing the extras that meant they did not want to proceed?
- You can model a funnel with up to 9 or 10 steps. I have found it great for optimising customer journeys, validating new designs, better understanding intent from different traffic types, and more.

## What about GA4?

As of July 2023, GA4 will be the only version of Google Analytics we use. You may be reading this book after that date, in which case some of the above will have changed slightly.

As of June 2022, Google is still trying different features and changes on GA4. There is a new way to create funnels with breakdowns that looks

promising. There are users complaining that ‘it’s falling short’, but it is too soon to draw conclusions.

Whatever GA4 ends up being, we will put a good effort into creating funnels with breakdowns, because we want to understand. We want to see if certain devices are causing the drop, if certain ages are having issues with the content, or if certain pieces of content have been misleading users (and many other questions besides).

## **What to do with the data?**

Whether we spend 30 minutes or 30 hours, we end up with piles of data: reports, spreadsheets, notes, you name it. The next thing we need to do is make the universe smaller. We need to distil what we found into:

- Urgent and actionable now.
- Urgent but complex to solve.
- Not urgent but important.
- Not urgent and not important, but relevant for the future.

We need to communicate the key information to the relevant stakeholders. *Key information only.* Bosses do not need to know about the complexities of solving a tracking issue, just that there is a tracking issue and you are getting help to sort it. Business owners do not want to spend extra time studying the regular expressions needed to put together a segment.

Data needs to be translated into tangible actions. If you are getting automated reports from an agency every month, let me tell you, it is your responsibility to dedicate time to those reports and fire questions back: ‘we keep seeing this trend, why do you think it keeps happening?’, ‘what picture is painting these numbers? Can we do a breakdown by device, by branded versus non branded?’.

Data will also tell you whether you can run a test, whether the test that has been running can reach a conclusion, or whether it needs more time.

## **Attribution: the forbidden word**

Inside agencies, every time a client brings up this word there is a moment of fright. It is the forbidden word for a reason: it touches the root of a problem nobody is able to fix, and yet we still need to make it work somehow.

Attribution is about deciphering the real value each traffic channel provides. How much do we need to invest in those Instagram ads? Did they work? How much did those campaigns contribute to the final sales?

In our imagination, every time we discuss how landing pages or websites work as a whole, it goes something like: ‘the user clicks on the ad, goes to

the landing page, then either buys from us or leaves us. If they leave, we then show them ads.' Does that ring a bell? Surely it does. But do we know what happens in reality?

If you visit 'User Explorer' inside GA, under Audience, you can get a real sense of what is going on. You can track users who have left and come back several times. You can see the traffic that brought them back, the pages they visited, the goals they completed and the exact times when they completed them.

The results are always wild. For example, a user spent 223 sessions on a site in 30 days. Most of them came via paid ads. The person did book services on a few occasions, but returned to the site dozens of times via different traffic acquisition channels.

How do we know the 'weight' (the value) each channel had in persuading this user to come back and book a service? That is the billion dollar question.

We do not know with 100% certainty, and we never will. But there are ways to get a sense of traffic acquisition value.



[ figure ]

*User Explorer report from GA (under Audience): dozens of sessions registered from the same user, at very different times, mostly coming back via the same paid ad.*

Google Analytics reports show how many conversions you got from organic, paid and referral, right? Yes, and also no. Those reports show the last channel they used before the sale, lead or booking, but tell you nothing about:

- Which other channels were involved.
- What 'weight' those other channels had over this sale.

Is there an easy way to get this missing information? Yes, and we should use it often. You can split the traffic in two: last click conversions or assisted conversions.

Last click, as we saw, are the channels users used right before the sale. Assisted are all the channels that assisted, however much or little, in the customer's decision journey. The report sits under Conversions > Multi Channel Funnels > Assisted Conversions.

[ figure ]

*Assisted conversions plus last click (or direct) conversions. Each channel helps score the goal and, at the same time, helps pass the ball to the channel that scores too.*

Whenever you need to decide where to spend your budget, do not look only at direct conversions; look for assisted ones too. If your agency is not providing this report, ask them to. I have seen cases where channels were 100% assisting, like top of the funnel ads (the ones we said are mainly there to make users aware of you and your solutions). The context validates their role in helping get a conversion.

If you ask ‘OK, but how do we establish in dollars how much that Facebook ad cost versus how much value came from the assisted conversion?’, that is where it gets tricky. But it can be done. It requires sitting down with the agency or your team and putting every cost on a spreadsheet. Then measuring it against the value of what you sell, and your margins.

What follows is a process where you assign a value to that first campaign based on your own perception. Unfortunately, there is no better way. Some companies say they use AI to establish attribution based on an algorithm, but I have seen those tools fail miserably, so no gracias.

### **What to avoid or be careful about**

- **Display ads with no measurement.** When running display ads, please do not fall for ‘brand awareness’ without any tracking or metric attached. Like running ads in a newspaper: you can assign a code, or create a specific landing page, that helps you see how that traffic behaves, whether it engages with your content, whether it spends the right amount of time on site, whether it visits enough pages before leaving.
- **Platform hunger games.** So common to hear ‘those sales were Facebook ads’, ‘no, they were Google Ads’. Two agencies or contractors fighting over who delivered the leads, bookings or sales. This happens because, in the absence of 100% clarity over all the steps users took before reaching a sale, platforms ‘assume’ value. For example, if someone viewed a Facebook ad and then went to Google, searched for a service, clicked on the ad, went to the site and converted, Facebook used to claim ‘that sale is 100% mine’. They did this for years. Finally, in 2021, they were forced to be more careful with that. They still do it though:

even a click on a Facebook ad is a signal for them that ‘whatever the user does afterwards does not matter, that conversion is ours’. Do not get me wrong, Google does the same. Be aware of this and always ask: what does this mean for Facebook, Google or whichever platform?

- **Getting too deep into attribution.** Because the nature of the user can never be fully mapped, we should treat ‘conversions and assisted conversions’ as an approximation, not as a definitive value. Rand Fishkin, a titan of SEO and digital marketing, recently posted an article saying ‘disregard attribution completely’.

The topic deserves a book of its own. I just wanted to share the basics so you know the challenge exists. Putting together marketing budgets is hard nowadays, because the data gets murky around which platform assisted how.



## Chapter 9

# Website platforms: what to choose?

. . .

The first time I heard about this was a long time ago, in the 20th century (1999, to be precise). Back at university, I managed to secure special funds for a ‘crazy’ project: putting together a digital newspaper. This happened in Argentina, so it was even more unheard of, because at that time only one digital newspaper was being built in the country.

We had to find someone who could visualise what we wanted as a whole, anticipate our future needs, sort out the operational cost, and make it work in a way that gave us some content freedom while still following template guidelines.

Fast forward 20 years and I cannot say things have changed much at the core. Since 1999 I have had the chance to participate in a few hundred projects related to creating new sites, or migrating from existing ones. There is a bit of wisdom that came from all those projects. Let me share it with you, in the hope it might help you make a more informed decision.

## Do you really need a new website?

This is how I start every project, with this question. It is a neglected one, but with quick further revision it brings up some major points to consider.

These are the answers I have received in the past:

- Our site is clunky and slow, we need a new and more streamlined web.
- We need to refresh our brand, so a new site would be ideal.
- Our site was made on platform X, we definitely want to move it to platform Y.
- SEO wise our site does not have the right capabilities to allow us to grow.
- Our competitors are all using X.

Many times, when discussing those points further (like asking ‘why move to a WordPress, Webflow or custom site?’), the answer ends up being ‘because experts recommend it’. Whether it is a web designer, developer, business analyst or marketing agency, there is always a recommendation. The question is: do they have any merit? How do we really know?

Some advice:

- Can you list all the reasons you think you need a new site, first?
- If you do the move, what have you learned about the existing website? What works and what does not? There are no blacks and whites, just different levels.
- Can you use half the budget for a new site to fix and improve the existing one?
- Do you know what produced the existing site as it is? Would you do something different next time to prevent the same thing happening again?

Let us assume you have weighed the variables and concluded: ‘we still need a new site’.

## **Considerations for a new site**

### **1. The ability to gather the right web analytics easily**

Perhaps one of the most neglected, yet most important features, that will come back to haunt you later.

- Are you able to track each step of the booking process?
- Are you able to track sessions between domains and subdomains?
- Are pages being generated dynamically under the same URL, or do you have different URLs?

Especially when the new site is custom, they fly on speed but become a living hell to track for clicked buttons and visited sections of the funnel. Tell the team that the ability to track the right pages and elements in easy ways is critical to our ability to know what works and what does not. Easy ways to gather information mean an easy way to grow the business.

From the get go, communicate this aspect and do not buy the typical answers, like ‘Google Tag Manager can provide tags and follow each click and button’. If you have not worked much with this other Google product, let me tell you, I have seen the most aberrant setups behind the scenes to compensate for poor website architecture.

And that is the key:

## **Website architecture must follow the business, not the other way around.**

We build good experiences for our customers, and we need to see the results in order to make sure we are doing it correctly. So build around this. We talked before about Steve Jobs and how he said once ‘we need to build technologies around our customers’. When you ask web designers or developers to look into creating a website, normally aspects like ‘the right use of code’ come first.

## **2. Self managing and controlling your assets**

I understand that an agency or contractor is building the website for our company, but whatever is built, your team needs to be able to manage 90% of it, or at the very least you need to be able to find other developers who can step in within a few days and continue the work.

It is nothing personal. But what happens if the company you hired:

- Does not have the capacity to work on the areas you find critical, or to solve emergencies?
- Fires the developer who built your site and replaces them with someone who has no idea?
- Raises prices that you no longer agree with?
- Does things badly, breaking parts of the site?
- Takes a long time, or has communication problems with you?
- Closes its doors? Gets bought, goes out of business, changes direction?

I have seen examples of each of these and none of them is pretty. The worst example I have seen happened with a custom build aimed at being super fast and having ‘the cleanest code ever’, which ended up in another fast and bad migration, because the client was requesting a few changes and the company was a) trying to charge crazy amounts of money (15,000 dollars to put a banner on a given template) and b) refusing to relinquish access for another company to do the job.

## **3. The ability to make changes**

Changes are good. Let me say it again: changes are good. Many times in the past we have had developers ‘nagging’ us because ‘your marketing plans are not 100% certain’ or ‘your roadmaps change every three months’.

To deny website changes is to deny the very existence of our marketer nature.

Instead, assume change. Embrace change. Get in front of the conversation and say: ‘we know we will be constantly changing the site, evolving the design based on test results. We need a platform that allows us to grow

without killing our budgets and our operational power.’

The recommendation is always to have areas dedicated to testing, sitting on the periphery of the main site (paid traffic landing pages, for example) with the ability to drag and drop content. The winners are then turned into a fixed template you can use across the site. This is just one of many examples.

Remember, the people building the site for you do not know much about your business, your customers or your team, and therefore they do not know your needs. A marketing manager or business owner needs to be diligent and know the overall ins and outs of the project. Do not place your most important business growth asset, the website, 100% in the hands of an agency.

You need a website that not only your staff have a certain level of access to, but also any contractor you bring in.

#### **4. Future proofing**

I used to lead a team of 10 plus SEO specialists. At one point we had 65 different types of websites. It was crazy: most of them did not have the technical capabilities to do a good SEO job. There was always something missing.

The solution was to cut down the type of platforms we would accept to work with, before selling any SEO program. That way we could ensure the quality of the work.

Many website platforms are good looking. All of them claim to be ‘SEO friendly’. Even Wix, one of the worst platforms we ever managed, now says it is ‘SEO optimised’.

The best way to find out is to do a quick Google search on the name of the platform and see what people from the industry say. Search ‘name of the platform + SEO problems’ too, and see what shows up. Look beyond the fancy ads on the platform’s own site.

Also, ask the agency or person who will build your site:

- How easy is it to create new pages following the same templates?
- How easy is it to add new functionality? Compatibility is an issue.
- How secure is the site, and why? (Google ‘name of the platform + vulnerabilities’ on your own.)
- How much support is there for vulnerabilities and updates? (From them, from the platform creators, and so on.)

#### **5. Pricing it right: are you paying too little, or too much?**

How do you achieve good value for money?

I remember the day I was called to a special and rather urgent meeting. I was the 'go to' digital marketing manager when it came to anything web. The company I was working for had recently acquired a new tertiary institution. That acquired business came with its own website, and I was asked to take a look.

It turned out they were about to launch a new site two weeks before the acquisition, so the 'new website' was almost ready to go, except that it was terrible. A complete disaster in terms of navigation, content, friction and platform restrictions.

I was living a nightmare. To give you an idea:

- The new site had 80 pages.
- An investment of 100,000 dollars had already been made.
- Search functionality was broken.
- It was nearly impossible to find where to request a lead, or to enrol.

They said to me: 'OK Jim, can you please fix this website with the remaining 20,000 dollars budget, plus add the e commerce part of it, which has not been done yet?'

Well, the answer was not easy. In the end, the site was rebuilt 100%. But why did this happen in the first place?

- An agency was hired not for its skills, but mainly because some of its members were close contacts of the tertiary. So the conflict of interest was already present.
- The agency was not held accountable.
- There were no milestones to ensure the desired quality from the get go.
- Worst of all, the people asking the agency for changes were not truly invested in the project. Most of those employees probably knew the company was going to be sold and that they would leave, so they had no passion or push to get the outcome the prospects needed.

Is 5,000, 50,000 or 100,000 dollars the right number? How can we be sure? We will never have 100% certainty that the figure charged is the correct one. Over time, you get a sense of whether it went well, or whether you have had to put in more money after the project was completed.

What helps minimise that uncertainty gap is:

- Before starting, narrow down as much as you can what you are after, the goals, the future needs. The more detailed the better.
- Get several quotes, from different types of web design companies.
- Ask them to break down the costs as much as possible.
- Hire an external consultant to analyse the proposals.
- Consider the size of your site: do you have 100 pages? 1,000?

- Consider what your own team can help with. In some cases the agency creates a webpage template and your team replicates it with the rest of the content, saving thousands of dollars and a lot of agency time.
- Whatever the number is, save 20% of the original budget for after launch adjustments.

Ballparks are hard to get. I normally hear '15,000 dollars for a website up to 100 pages, whether it is e commerce or not'. Then quickly: '...and normally it becomes 30,000 if we add all the custom functionality.'

## **6. Agency capabilities: can they actually do a good job?**

Years before the case I just mentioned, when I was not yet fully managing websites but getting there, we were handling a mammoth site: 12,000 pages, 27 websites under the main one. My boss said: 'I saw at a conference a group of professionals dedicated to improving education related businesses, and they are quite cheap.' She added: 'Jim, we need to make sure they know what they are doing.' So I was sent on a plane to a different city to meet the developers.

At the time, I asked all the pertinent questions I could imagine, and to my surprise they were quite good at answering them. Their proposal was a fifth of the best ones we had received. But there was a gut feeling that something was off. I worked with the original site every day and knew how gargantuan it was. Anything done there required hundreds of hours of work.

Still, I reported back: 'they know what to do, the question is whether they will deliver.' And they did not.

They started to delay milestones, which triggered my alarms. I reported it immediately and the phone calls started to pour over that agency. We ended up paying 'the price of cheap': while the company did not charge much, we lost eight months. The board was excruciatingly chasing us, and we were nowhere near completion.

Why did we fail to see this? The referrals were good, the company looked solid. One thing was different and, in hindsight, it was a big deal: all of the previous websites in their case studies had been built on WordPress, and we were asking them to migrate a massive Joomla site.

The size was another factor. All the websites they had handled were 100 pages at most. This was on us.

All agencies will make a good effort to say 'yes, we can do it, of course we are prepared for this project'. It is up to us to find out if they really have the capability to deliver.

Things we could have done differently:

- Asked them to complete or fulfil a smaller project before jumping to the huge one.

- Asked about specific experience with our CMS (platform).
- Been tougher with milestones: the first deadline missed, the project would have stopped right there.
- Paid more attention to other proposals: they were asking between 70,000 and 125,000 dollars to start with. The price difference should have triggered more ‘why so cheap?’ thinking.
- Asked around in forums and on LinkedIn about these guys.
- Paid more attention to the work they had finished. Was the scale of the job as challenging as our own, or at least close to it?

The board gave us a month to finish the whole project. We hired another agency to help create the look and feel and the design of some templates. We took it from there and migrated all the content manually. It was a titanic effort, but we delivered a website that, despite some issues here and there, was working acceptably. Six months after that, we managed to tame it and have all the content under control.

## Designing my own site

Squarespace, Wix, Weebly: have you decided to put together your own website design?

I have seen ads on YouTube and elsewhere where the likes of Squarespace say ‘drag and drop and that’s it’. I have found this to be completely untrue. I have found it appalling on many levels.

Only if you are starting out, with a small company, would I advise using these. Otherwise, avoid them at all costs. Not only do they have restrictions on future proofing, but the main point is that you are not a web designer. There are tons of things to consider in a design, especially for mobile. What starts as a convenient, cheap site ends up being a pain for your company.

Nobody tells people ‘hey, your site is horrible, please get help’. The feedback I see is often ‘oh, look at that, did you do it yourself? Wow.’ It is only when those sites start to underperform on sales that the reality reveals itself. Yes, a few of them sell in good numbers, but that is because the people who buy are already sold; they are just there to grab what they need.

There are many design principles involved. It is one thing to try to improve what has been done already, and a very different thing to try to take design into your own hands.

What about Webflow? It seems to be a good drag and drop, but again, to be used by professionals, or at least by people dedicated to this subject.

## **Are WordPress or Shopify any good?**

Developers will say many things about these two, but at the end of the day they work. They work for you, for your team, for your customers and even for developers (though they may complain).

Both have:

- Worldwide support.
- An infinity of plugins and integrations.
- Ease of use, with the right setup.
- Flexibility in terms of what you want to build.

The negatives:

- Because they are the most popular in the world, they are the most targeted by hackers. Security will always be a major concern.
- Their code can make the site clunky and heavy, impacting the mobile experience.

When asked, I have been saying for a couple of years that the pros outweigh the cons in both cases. I would prefer WordPress and WooCommerce (yes, knowing how WooCommerce is) to Shopify. The reason is that with the normal paid Shopify version you have no access to optimise the bottom of the funnel (the cart and checkout). That is a big pity, since that section is the first one to be optimised when you are looking to improve results in a short time.

From all the clients I have worked with, with diverse scenarios, budgets and sizes, I can honestly say that when they have either WordPress or Shopify, the work needed is completed without too many issues or costs. True, from time to time you find a fragile WordPress site that has been built so poorly that the moment you modify a page it breaks. But that is rare.

Unless you have a large and complex site, you cannot go wrong with either of these (provided, of course, you find a good developer or designer).

## **What's the deal with custom builds?**

Custom sites are normally built on Laravel, React, plain HTML, or .NET versions like Umbraco, to name a few. The benefits are:

- Internal functionalities are tailor made for your team.
- Extremely clean code: only what you need is what you use (provided you find a trusted company that produces good code).
- Great performance in terms of loading time (in theory; in practice this is not always the case, as we will see).
- Once your team is trained, it is an easy 'rinse and repeat' to add content.

I have seen universities and large corporations using these platforms, but small and medium sized businesses too. We have managed several ‘angry’ migrations from businesses that felt conned by web developer agencies after things went downhill upon moving to a custom build. These are the issues they experienced:

- **The code was supposed to be lean, but the site ended up bloated anyway.** When asked why, the agency would say ‘the client added requirements outside the scope’; the client would say ‘we only requested minimum, straightforward changes, like adding a form capture, and we ran into all sorts of problems’.
- **The site was plagued with bugs, and the developer was missing in action.** A car rental company revamping their car booking functionality using React: an endless number of issues.
- **The training trap.** A 200,000 dollar project, the website is completed, but training was agreed to happen ‘outside the scope’ and was not discussed much. ‘How much could that training really cost, right?’. For a team of ten, the proposed training had a budget as big as the site: another 200,000 dollars. The company ended up sending two people, instead of ten, and felt like a hostage in the process.
- **Speaking of hostages,** another company I worked with launched their site only to find they had more ideas and new needs, and everything came at an extra cost. They were told that this would be the case, but what they did not anticipate was that those extras would now fall under a different price rate, so they were paying 10,000 dollars to add a banner on one template.

You might say ‘OK Jim, you’re biased, not all custom builds end up like that’. Fair enough. I would say, however, that regardless of who offers you these solutions, please consider the following:

- **Marketing equals change.** As we mentioned before, tell them this is a non negotiable requirement: to be able to make changes of all sorts on the site whenever needed.
- **Autonomy** for you, or for other web developers of your liking, to step in.
- **Support after completion.** Who is going to be upgrading your website with the latest security and integration updates?
- **Integrations.** Will the site be able to integrate with anything you require?
- **Training is included in the price tag,** with a forever source of training material available.

And when web developers tell you ‘I don’t really like WordPress or Shopify’, please tell them: ‘it is not about your preferences, it is about being able to

deliver a solid experience for our customers without killing our operational power and our ability to effectively measure what users do.'

Chapter 10

# Testing: bias gets in the way of growth

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We mentioned before that marketing equals change. That is so true when it comes to your ads. How many sets of new ads have you tried? If you are running Facebook ads, or any social ad, you have probably swapped creatives dozens of times by now. The headline copy too.

That is great, because we do not know exactly how to approach our audience all the time and get the best reception, engagement and results.

That is the ‘promise’ side of things. Now, let us talk about how your *site* has been keeping up. Have your landing pages been changing in step with all those ad changes?

What do you mean it has been months without touching key pages?

I know. Testing can be hard. Let me tell you, though, that getting to a point where conversions are down and you have to start changing things in a panic is even harder. Perhaps I can persuade you to take a few steps on this. Let us start from the beginning.

## Why do we need to test?

The main reason is that you have been working on your own site, with your team, for some time now. You know the services you offer and what each product description really means. You know the quality of that product or service, and the real pros and cons.

When the product page, service page or landing page was put together, it made sense. You shared it with peers and colleagues. They came to the conclusion that ‘the page looks great, the message is clear’. Even the boss said ‘good job, that looks awesome’.

But there is a problem: customers do not see it that way.

A problem indeed, because customers are not going to knock on our door to tell us. Instead, we see strange behaviour, such as an elevated bounce

rate (people landing and leaving immediately), and we attribute it to all kinds of internal and external factors, anything except the real ‘why are they leaving?’

Remember we said that we need to earn users’ clicks and time on page bit by bit, from top to bottom? If the message at the bottom is not good enough, or the offer has not been presented as it should, they will leave.

Clarity is underrated. You would think that a couple of words on a very expressive background would be enough for users to understand what you are trying to convey, right? I thought the same, for years.

Then I had teachers who asked me to test, to challenge my own preconceptions, and so I did. And the surprises started showing up. There are many types of tests, but let me show you what I mean when I say ‘clarity is underrated’.

Take this example: a site that sells probiotic treatments for dogs and horses, and which had recently added cats too.



*Original homepage: long paragraph, busy background, slow to read.*

You probably will not get to read every paragraph, but at least the title is readable. The background is about horses and dogs. Yes, the paragraph is too long, but overall, what would users think about this?

We performed something called user testing: we hired random people who had never engaged with this brand or product before, and gave them five seconds to get an idea of what the site was about. Yes, only five seconds. That is generous, actually: users browsing in a hurry might give it less. We need to convince them to stay, to know that this is the right place and the right offer for them. That is our mission.

What did they say?



*Test results: ‘food for animals’, ‘a child standing’, ‘something with pets’, ‘something about charity’... and then yes, one person nailed the answer.*

This is not about getting 200 people to share their thoughts. You only need a handful: 10 will suffice.

Clarity was not present in this example, because users very quickly made up their own stories. They were not willing to read more, and they pulled the story from the background image.

**If you don't create a compelling story about your products or services, they will. And you won't agree with what they come up with.**

Can we turn this around? Of course. We adjusted the value proposition, as we discussed before, and tested again.



[ figure ]

*Same photo, reduced paragraph, almost the same copy with just a change in format.*

Results:



[ figure ]

*Three users now nailed it, one was close but not exactly what we wanted, and one was still unsure.*

This is real progress. Eventually, the design changed, the photo changed, and now I am confident we are getting nine out of 10 who clearly understand what this is about.

Note: this test was not even aimed at directly increasing sales. The key metrics after these changes on the homepage were:

- Average session duration.
- Click through rate from the homepage to the key product page.
- A consistent pattern on heat maps (more consistent clicks on the CTA button).

## What kind of tests can you run?

Let us look at some useful types of tests, where to use them, and how.

## **Data driven testing**

These tests rely on data to report results. Contrary to the test we just saw, these are quantitative.

### **Simple testing**

This test is ideal for small sites, pages with low traffic, and pages with a low number of leads or transactions.

Basically, you grab metrics from the existing page you want to improve (leads or transactions over a period of no less than two weeks), make changes (as many as you consider necessary), replace the page, and see how it performs in the same timeframe.

You can do testing on any site. It might require more time to validate, as we will see, but it is 100% feasible.

### **A/B testing**

Quite popular in the conversion optimisation circles. Some people believe this is pretty much the only way to really test.

It works by running two different versions (or more) of the same page at the same time, with traffic automatically split between them (you decide what percentage of traffic goes where).

The good thing is that it is faster than simple testing and, when executed well, you can have simultaneous A/B tests running across your site.

The downside is that to validate the results you need a good sample size, otherwise the results become less 'certain'. We are typically advised to achieve at least 95% statistical significance, which usually means 1,000 transactions or leads on the page being tested. There are A/B testing sample calculators online if you Google for them.

There are more components at play, like statistical power (how likely you are to perceive a change in conversion rate, if it actually happens). This type of test should run for a minimum of two weeks, to account for seasonality and other external factors.

### **Multivariate tests**

Where A/B tests normally focus on whether one element works better than the original (for example, a better value proposition: two pages that look almost identical, except for the value proposition), multivariate tests test different changes on a single page, all at once.

This is more complex. It requires more capacity and more learning to be run properly.

[ figure ]

Source: VWO (a testing platform).

## Feedback driven testing

Also called qualitative tests. They aim to gather feedback from users who are not biased and who do not know anything about us.

### 5 second test

As the name suggests, you show users an image for a set number of seconds (normally five, although you can choose more or fewer), and then the system removes the image. Users then answer the questions we have prepared. Those questions need to be designed to make people reveal their line of thinking.

We saw this with the probiotics business that also offers products for horses. These tests are quite affordable. I will share a link soon where you can find them.

### Preference test

You let users compare two versions of a homepage, product page or landing page (any page you like). They have to pick one and tell us why. In the process, you collect a lot of feedback, both from the positive and the negative answers. This will help you refine your copy and messaging.

I use usabilityhub.com quite often: very effective, cheap and straightforward.

[ figure ]

UsabilityHub dashboard: choose what type of test to run.

For the 5 second test, they also provide an audience you can hire.

## User testing

There are platforms like [usertesting.com](https://www.usertesting.com) that allow you to run multiple types of tests. You can also have 'random' internet people record themselves on video, so you can see their reactions too.

[ figure ]

*Usertesting.com: one of the biggest and most popular user testing platforms.*

## What do we need to run tests?

### Good testing conditions

By that, we mean:

- Campaigns and traffic remain steady in volume and messaging, with nothing else being tested at the same time.
- Avoid public holidays or periods with major events.
- A good benchmark beforehand: if we want to bring new results, we need previous data to compare against properly.
- A testing attitude: results take time. Any positive or negative outcome will need to be confirmed over time. Let us not jump to conclusions.

### Platforms

While simple testing only requires the existing website, A/B tests, multivariate tests and qualitative user testing all require platforms.

For A/B testing, I normally use:

- Google Optimize (free).
- Unbounce (a landing page builder with built in A/B testing).
- VWO (used before, not anymore).
- Convert.com, used by some clients.
- Optimizely: I have not used it personally, but I know it is well positioned, especially with bigger companies.

### Traffic volume

The CXL A/B test calculator is quite complete:  
<https://cxl.com/ab-test-calculator/>

If you input all the values and play with how long the test will run, you will get the estimated volume required.

Let us be frank: more often than not we do not need to wait a whole month to see how a test is doing or will do. In that sense, '95% statistical significance' does not happen as often. You decide what percentage you are comfortable with. Each scenario is unique.

If you have a major event coming up and have to run a test only a week before, just take whichever version reported higher and go with it.

Another interesting metric you will find is the MDE (minimum detectable effect). It tells us 'how much improvement do we need in order to attest a solid, perceptible increase in performance?'

## **A quick note about 'weight'**

Your site is not evenly distributed when it comes to traffic. Some pages get the biggest percentage of views, while others are barely visited. The pages with more traffic volume, and the pages closer to transactions or leads, are the most important ones.

When testing, you are always aiming at the pages that will make the biggest difference, the ones that can influence users the most.

Ask the right questions:

- Which pages should we test?
- What areas of these pages are worth testing? Why?
- How will we recognise success or failure?
- Which metrics are involved?
- How are we going to track these results?
- How long will the test run?
- What is the minimum increase in performance we need to achieve in order to recognise that the test is working?
- Who needs to be involved in the process? Who needs to be aware (web developers, for example, so they abstain from making other changes on the site)?

It all starts with an attitude towards change. Always be testing something, and always make sure you draw conclusions from each test.

I have worked with clients who changed the homepage every four days. They have no notion of what works and what does not, because there is no proper tracking of changes or of the different user behaviour in each version.

It is better to run one good test than five random changes.



## Chapter 11

# Research: our marketing compass



Let us imagine we are in the white room again. On the left we have a prospect, in the middle we have our offer, and on the right is us.

We have set this scene before, but this time I want us to pay close attention to the person on the left. Is it someone whose door we just opened? What do we know about them?

Even if you are selling something you know people want, something they will buy regardless of whether they are new to you or not, you still want to maximise the opportunity and sell as much as possible.

Research can sound like a scientific investigation, with lab coats and all. Sometimes the practice is more mundane than that, but it is also highly effective.

## Conversion research

One solid way to do research is to look at your existing website and existing campaigns, map the user journey and see where the holes are. If the premise is to find the smallest change that will produce the biggest impact, in the least time, with the least effort, then conversion research is the way to go.

This is the core of the activities we practise at Align Digital, our consultancy, and it has been four years of refining the process. While I would need a book or two to explain the whole thing, I can definitely share, in a few pages, the overall idea, with advice for you to do your own research.

## Fighting biases

The number one problem we need to face is our own biases. We have mentioned them before. Whether it is data or designs, we put together very quickly a narrative that 'explains it all'.

How do we counter this? By producing quantitative and qualitative data, and contextualising the results. More specifically, we run different 'lenses' over our website to see what opportunities and insights we can distil. Once we have collected as many as possible, we categorise them by importance and start testing changes.

Sounds confusing? Let me put it on a graphic.



*Conversion research lenses, applied over the website to extract insights and opportunities.*

Let us walk through each of these lenses.

## Heuristic analysis

Heuristic analysis is expert advice based on our own experience and on our study of design, combined.

We check things like:

- Do key pages have enough trust signals?
- Is there a clear value proposition?
- Has the visual hierarchy been established?
- Are there distractions or frictions in the design?
- Is the formatting clear enough?

We revise each page of the site, looking for distractions, frictions and confusing copy. One way to do this yourself (and I always recommend it) is to grab an old phone, three or four years old, and go through your site. Click everything, scroll everything, and take notes. There is always something that shows up, whether it is content being cut off, small fonts, buttons that are too tiny, or links that go nowhere.

This activity merges with the next one.

## Tech analysis

Remember the optimisation hierarchy pyramid we saw earlier, where the foundation was that:

- The site works on all devices (mobile and desktop).
- It loads and runs quickly.
- Customers can see it.
- Customers can use it.

Google Analytics can help us identify which screen resolutions are underperforming and where, so we have a hint of where to start looking.

## Web analytics (GA)

The main item from the quantitative group. We can identify which pages receive the most traffic, how many conversions they report, and so we can map which are the key pages with the most power to sway users into conversion.

On top of that, we can find out:

- Who are the top performers, and what is their behaviour?
- Which day of the week is most used, and how many interactions were needed to acquire the product?
- What is the difference between mobile phones in terms of conversions?

And much more. Web analytics is the cornerstone of conversion research.

## Mouse tracking

Have you ever used a heat map and mouse tracking platform, like Hotjar, Clarity or CrazyEgg? That kind of software will show you where people clicked and how far they scrolled. You can also record sessions and see exactly how users moved their mouse, paused, and clicked.

Here is the big difference:

- We follow insights from GA and tech analysis and go straight to the key pages to see how user behaviour has been impacted.
- We analyse user flow: are users seeing all the content, or just what is above the fold?
- User recordings: how many clicks do they make? How often do they go back and forth? Are they scanning or reading?

So we need to have some Google Analytics and tech analysis first, before we jump into watching heat maps. That is a big change for many people. Let me explain why.

I used to jump straight to seeing where people clicked, but it was hard to draw solid conclusions from what I was watching. After combining this activity with Google Analytics, things changed:

- Now I knew which pages to focus on, instead of randomly watching behaviour across the whole site.
- Now I knew which devices were underperforming, so I could go to Hotjar and filter by device.
- We have more context, which helps us understand the real explanation behind behaviour that otherwise makes no sense (for example, why on mobile do all users go straight to the menu? Is it because they don't like the content on the page?).

## **User testing**

We saw the example of the probiotics homepage and how people were understanding different things. These lenses are qualitative and very helpful for starting to listen to users instead of drawing our own conclusions.

Let us recap how it works:

- We ask random people for their impressions about a design or some copy.
- We also do preference tests: we ask them to choose between two versions and explain why.
- This information is qualitative (the opposite of quantitative) and helps to reduce our own bias. Is our message clear enough that anybody can understand it?

We aim to recruit 10 people per test, no more. The results add context to our research.

## **Exit polls**

You have probably seen some of them already. Most of them are quite annoying, unfortunately.

The problem with this kind of exit poll on websites is that:

- They are poorly timed: showing up on the homepage when you have not even seen what the site is about.
- They have questions whose answers tell you nothing.
- They get in the way of the user experience, with friction and distractions.

There are ways to get real value from them:

- Time the exit poll to show up on the right page, under the right triggers.

- Ask the right questions.
- Be patient with the results and gather good feedback every month.

Then you will see their immense value. Let us look at an example of an exit poll and its results when properly set up.

When asked ‘what is holding you back?’ on a website that sells water bottles with filters, these were the answers collected:



*Exit poll responses on a water filter site: a clear list of objections users have not yet resolved.*

It can tell you about users’ perceptions, the quality of certain traffic types, users’ objections and so much more.

## Customer surveys

Another strong qualitative method is the customer survey. You use an existing email database as the number one way to reach your customers, and ask questions like:

1. What made you want to purchase a water filtration product?
2. What mattered most to you when purchasing a water filtration product?
3. What made you decide to buy from us over other similar providers?
4. Why did you choose Lifestraw.com over other stores (online or offline)?
5. What did you like most about your purchasing experience with us?
6. Was there anything that nearly stopped you from purchasing any of our products? If so, what?
7. Did you have questions you couldn’t find answers to on our website?
8. How else could we improve your customer experience with us?
9. What can you tell us about yourself?
10. Anything else you’d like to add about your experience with us?

Sitting between a survey and an exit poll is the V.O.C., the voice of the customer. We try not just to see what users are saying, but which words they use, what their language style and tone are.

An easy way to do research is to analyse customer reviews. There are cases where entire titles are made from phrases used by users when putting together value propositions. There is an expert on this subject, Momoko Price, and I highly recommend you look up her work if you want to know

more. She has extreme detail on this topic.

## **Gather all the information and turn it into actions**

One known way to collect and prioritise the actions to take across the site is the I.C.E. scoring framework. ICE stands for Impact, Confidence and Ease. Here is how it looks.



*ICE scoring framework. Source: Ben Ratner / SlideShare.*

We assign a score to each area we have detected as ripe for testing or improvement. Yes, it is a subjective process (and always will be). It relies on your ability to gauge the potential impact of the changes you propose for your site.

As overall guidance:

- Pages with more traffic volume are more likely to generate a perceptible change in performance.
- Same with pages close to the conversion point (checkout).
- Above the fold copy (the value proposition) carries more weight than the content below.
- Offers are strong motivational forces too.

Once you put it all together, you can devise a roadmap that lays out who is fixing what, who is testing what, when, and what resources are needed. The result is a project that can span many months.

## Chapter 12

# In the pursuit of growth



It is a natural drive for companies to grow on revenue, on volume of customers and on the quality of the relationship with them, in the shortest possible time and with the least amount of resources.

Based on this paradigm we get to see terms like ‘growth hacks’, and a vast variety of tactics: ‘put money here and you’ll get sales’.

I see these typically coming from social media paid ads, like Facebook and Instagram, which are great for generating a traffic buzz and, in many cases, a big volume of sales. This has been happening for several years now.

Back in 2016 I made the recommendation to switch budgets, putting Facebook as number one and Google Ads as number two. It was crazy, because Google Ads has a higher level of intent, but Facebook was so cheap that you could ‘irrigate’ with such a force that you would, eventually, get more leads or sales at a lower cost per acquisition than Google.

Fine, that was our scenario. But (of course there is a ‘but’), I have also seen the following:

- A client selling a big number of products, while her margins were getting significantly slim, to the point where she would pause other marketing activities in order to dedicate the budget solely to Facebook.
- A client who based their strategy around a winning channel, only to find later on that performance went down with no clear way to revert it.
- Rising click costs after Covid, plus the changes from the iPhone iOS 14 update, meant a further inability to track and paint attribution. That increased cost per acquisition and also affected our ‘budget compass’.

## Margins

There is no point in making waves about revenue when, internally, our margins are getting slim. We should always shield a percentage of our intended margins when dealing with agencies.

You have probably been there, when they ask: 'how many sales do we need to do for you to say this is working for you?'. The advice is to calculate the number including all the costs: agency fees, the time your team members spend supervising agency efforts, everything. Make sure the number to be achieved is realistic.

Margins do not only allow the company to grow. They allow reinvestment, experimentation and, above all, the possibility of increasing the quality and the offers of the services and products you produce.

Seth Godin always talks about the 'race to the bottom'. When what you offer is a commodity (renting a car, plumbing services, selling coffee beans), you get a lot of competition. Naturally, the one with the lowest prices makes more sales, and so the race to the bottom begins.

It gets so bad that even if you put a massive discount in place, it only takes a competitor two or three days doing the same to bring down your campaign results. Not only that, but it gets harder to convince someone to buy your product or service. We are stuck in a box with the same message, the same offer and the same pricing. There is nothing really different for users to remember.

Because we are cutting prices to sell more, the quality and the experience of the service are also impacted, generating a vicious circle in which you have to put more effort into sales, because there are no referrals or returning customers either.

I have worked with clients making a real effort to break this circle. It is not easy, but it is not impossible. The first step to getting into a higher end product, or a product that is perceived differently and that lets you charge more, is to understand what value really is.

## **Value as a key driver for growth**

We are wired to link work ethic, quality of craft and value into one single thing. The world, however, seems to work differently. People pay money for the most grotesque, unnecessary, shallow things.

I have had 'value faith crises' before, and it took me years to get over them. Let me explain what I mean.

We do not need to start selling things that border on ripping people off (I am looking at you, Goop, with your special candles). But we do need to understand that certain details, certain elements of our services and products, resonate more with certain people. Before we get into mystical vibes, here is a real life example: car rentals.

- There are many.
- They look the same.

- Most of them claim to be cheap and affordable.
- If you remember one, it is because it was slightly more convenient to hire than the others.

Let us say we own such a car rental company. What can we do to be different, to position value in the middle of commodities?

## **We start where it matters: with our customers**

First, we go from general to specific. Who are the top groups of people renting these cars?

- Families.
- Single people in their late 20s.
- People movers.
- Business trips.

From here, we bring some conversion research. Which of these groups converts more, presents more traffic volume opportunities, and is therefore worth investing in over the others?

The result, in this case: single people in their late 20s are the top group. Now, let us go deeper:

- Who are they?
- Why do they rent?
- Where are they going?
- With whom?
- When?
- How is their trip? How far do they go, and what use do they give to a car?
- Do they care about car models?
- Is money a deterrent for renting?

Here is the hypothetical conclusion:

- We find that they are mostly women aged 25 to 30, who live downtown, are professionals and do not own a car (or own cheap cars that are not safe for travelling).
- While money is not an issue, it is also not a priority. They prefer an affordable car, easy and convenient, from any brand, and save money for activities.
- On further surveys and interviews, value starts to show up more clearly: the car is the literal vehicle to some well deserved unique memories with friends.

Now that is something we can work with. We do not even need to change core aspects of our products or our company.

What can we do for this audience, beyond catching their attention with relevant ads?

- If the average number of people in the car is four, and their average trips are three hours long, they will need to charge their phones. Imagine a piece of copy saying 'don't miss a moment: we'll provide USB chargers for your friends as well'. That is a point of difference. That is value.
- If we know where they are going, we can anticipate their pains, whether they are aware of them or not. Recommendations of what to do over there, promotions linked to activities we know they will do (only relevant ones), and a curated selection of cars: the ones that are the top choice of this audience because of size and ease of driving.

With all this information, we can create a funnel, more dedicated ads and a landing page that talks to them, and to them alone. By doing this, we will be spending less on ads, because we will not need to irrigate the market just to scrape clicks.

The value proposition, the positioning and the messaging can all tell a story about a professional woman who is independent and is having the time of her life by taking her friends on a trip. That will deliver higher conversions for sure, because those customers will be experiencing a greater sense of value.

## **How does this transform into growth?**

If, on top of this, you take this intimate knowledge about your audience and turn it into a core element that goes all the way up the company, that reaches the decision makers and helps reshape the way you deliver services; if you take to heart your audience and anticipate their pains, choosing the cars they need and the promos they would actually go after; then you will achieve this:

- CAC (cost per acquisition) goes down.
- Ad relevance goes up.
- Intent is better managed.
- That initial motivation is received and acknowledged.
- The car rental experience is excellent, so they talk about you.
- Not only that, you can then anticipate and offer them a package for the next trip.

The result of this exercise is growth in more ways than just revenue. Not only because we set up a campaign and got some sales, but growth in the

sense that you are doing things differently this time:

- Breaking the race to the bottom.
- Getting in tune with your audience at a level you had not done before.
- Adapting your business, pushing your marketing team with creativity to think more about the added value of renting from you.
- The process of discovering an audience, conducting qualitative research, putting together digital assets and testing them is invaluable. It is the roadmap to start building a culture of experimentation.
- Customer lifetime value (CLV) is now being taken into consideration.

And that last point is quite important. Chasing the wheel for more sales kills growth. Increasing CLV becomes paramount to achieving it. The ultimate scenario you want to be in with your company is one in which your customers become your ambassadors.

Conversions are elusive, hard to obtain and harder to sustain.  
From Ecommerce to bookings or lead generation sites, we are in the game to  
optimise our websites in order to maximise the ad spend.

What do we do when results aren't there, when agencies don't know what's  
failing and businesses need to revise their site from a different optic?

This book will give you an all-around idea of what's needed to find it out.  
What's at play and what are the things that you and your team haven't  
considered but are extremely relevant in order to bring conversions back.

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In this Founder's Edition a summary of key 12 pillars of Digital Marketing  
are shown: these are a part of a larger conversation to which you'll be  
invited to participate.

With the team at Align Digital we have decided to increase efforts in  
brining training solutions to marketing teams & business owners. We are  
building a platform and, this book should be the starting point, the  
foundational stone of what's to come.

The book presents a series of connected thoughts around key areas.  
While you can read it as a normal book, it is also advisable to jump at the  
desired chapter, depending on where are you on your journey/present  
challenges.

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