CHAPTER ONE

What Is Holistic Conversion Rate Optimization?

When talking about conversion rate optimization, we often talk about low-hanging fruit in reference to ideas that easily and/or quickly improve conversions. Who wouldn't want some low-hanging fruit? Easy pickings are often where we find some of the fastest and highest returns.

When I look at the idea of low-hanging fruit, a whole series of questions comes to my mind. What is low-hanging fruit? What makes one fruit a better pick than another? Can you tell if a conversion idea is ripe just by looking at it? If you have to start cutting branches, which branch is best? And when you get right down to it, isn't all fruit low-hanging if you cut down the tree?

Let me be clear, I am not suggesting you cut down your marketing tree because then the tree will die. I am also not necessarily suggesting that you have to start over with your website to improve conversions. The secret to why a fruit hangs low on a tree is often embedded in the roots. Who is to say that you can't go after the low-hanging fruit of conversion while simultaneously building a better and longer-lasting foundation, which will bear more branches and higher volumes of fruit? Who is stopping you from planting a second, third, or even fourth tree? What is keeping you from selectively improving the DNA of the tree so that it

bears more delicious and low-hanging fruit? And what's the best way to reach the not-so-low-hanging fruit?

These are the kinds of questions most people don't typically ask. But they are the questions that are important to ask when looking to improve conversion. *Convert Every Click* is about questioning your assumptions and looking at your marketing in a different way. It's training yourself to ask the questions and reach for new heights. It's training yourself to see the bigger picture while remembering the individual prospect or customer at the same time.

Ever since I can remember I've been an inherently curious person, which made me a natural experimenter. I loved to take things apart and rebuild them. I also enjoyed building things from scratch. I had many interests and experimented with many projects throughout my life. I've come to realize that most of them contributed to making me into the person I am today.

My father's lifetime hobby has always been the art of performance magic. When I was eight, he brought me into his hobby and exposed me to a world of concepts that most people don't learn in a lifetime. Having to go on stage and present an illusion at age eight was a nerve-wracking experience. Any performance is an art with many parts. As a presenter, you focus not just on yourself, but also on what your audience perceives. Your perception and your audience's perception are totally different things. Every individual has different needs and wants, and so it's the performer's job to try to give each of them what they are looking for. These lessons I learned so young became very valuable later in life with conversion rate optimization.

Around the same time I was learning magic, I was exposed to our first home computer. Because of my keen sense of curiosity, my first thoughts with the computer were *How does this work?* and *What are all the things it can do?* I quickly learned almost everything it could do, and even took it apart and put it back together. My parents didn't love finding that out. Luckily, it still functioned afterward, and apparently I learned some useful skills. A few years later, when I was 11, I made my first business website. At 13, I took on my first e-commerce client.

From ages 13 to 24, I created many different businesses. I spent time as a web programmer and as a print and web designer, and I was always learning how to be a better entrepreneur through each of my businesses.

I also studied psychology and learned more about its profound effect on business and marketing. Because of my need to experiment and figure things out, I went from business to business, learning many skills and gaining exposure to many industries along the way. Because of my early exposure to technology, I always had a special knack for understanding the intricacies of the online world. One of my old employers called me a "triple threat" because of my skills in web design, coding, *and* marketing. Most importantly, because of my entrepreneurial experiences and studies in psychology, I came to understand and greatly appreciate how each of these skills plays a role in generating a good return on investment from every effort, both online and off-line.

Since then, I've built a series of "Core" companies, which fill different needs for different audiences. ConversionCore is a consulting firm that focuses on using my holistic conversion techniques to help mid- to large-sized companies grow their bottom lines. My other companies include ClickCore (an ROI-focused web development company), AutomationCore, which helps small businesses grow through marketing automation–related products, and a few sideline software companies, which solve different problems for different audiences. One of those software companies was acquired, and in 2012 became my first seven-figure deal.

It all comes back to psychology and experimentation. I could never have sold that software company or helped grow so many of my clients' companies without all of the lessons and skills I learned through the years. None of that would have been possible without my natural curiosity and need to continually improve existing systems.

Fortunately for everyone, technology has advanced to the point where you can often use software to test your ideas in the real world and see if you're improving. You don't have to deconstruct and reconstruct entire businesses to achieve improvements. I'll tell you about the software later in the book.

The business world is slowly catching on to these conversion techniques, and I hope they will become mainstream someday. For now, I want to give you a serious competitive edge over other companies. In this book, I'm not just going to tell you how to perform the magic, as if it were a memorized trick. I'm going to show you the principles *behind* the magic of conversion rate optimization, the psychology that makes it really work for all kinds of audiences. And just like magic (pun

intended), you're going to be amazed at what you can do once you understand the foundations.

Don't get me wrong; magic is only an analogy here. We're not trying to *trick* people into buying your products or signing up for your mailing list! The goal is to put your products and services in the best light, present them at the best angle, so each audience member sees it in the best possible way for them.

This whole book is about revealing those secrets to you. Starting in the next chapter, I hope your eyes will be opened to a whole new perspective of the online world. Even if you think you already have a pretty good handle on your business, you're going to see something new. But before we can begin, it's important for you and I to be on the same page about what conversion rate optimization is from my perspective.

Let's Start at the Beginning

Even if you already know a good deal about conversion rate optimization (CRO), you're going to find that I approach things a little differently. At some point, CRO became known for on-page optimization, and the industry grew around that. People even now work in isolation, one page at a time. Once they get results for that single page, they move on to the next page.

The problem is that no single marketing component works in isolation. Everything affects something else. It's an entire ecosystem of marketing. When you tinker with one piece by itself, you may have no idea what you're affecting down the line. A boost in conversion rates on one page might actually hurt the bottom line, if you're not paying attention to the bigger picture.

Holistic Conversion Rate Optimization (HCRO), on the other hand, takes the entire marketing ecosystem into account. We like to think in terms of the entire marketing process, including funnels and overall structures. While we do look at individual pages and metrics, we always look at them while simultaneously considering the big picture. In other words, in addition to optimizing the website, we look at what happens before prospects hit the website (traffic), as well as what happens after they leave (follow-up). I call this the Holistic Conversion Timeline

Holistic Conversion Timeline

Figure 1.1 I look at the conversion process as a timeline. Improving conversions on a web page is good, but improving conversions all along the timeline (including the traffic and follow–up phases) is better.

(Figure 1.1). The traffic stage happens at the beginning of the timeline on the left, then people progress to the website, then there's a follow-up stage. The follow-up takes them back to the traffic stage. There may be other steps in between these three major points on the timeline, such as phone calls or direct mail.

A conversion can happen anywhere on the timeline. For example, if you have an online ad with a phone number, a person might convert into a customer without ever getting to the website. Or if you collect a lead on the website and you have off-line follow-up, they might convert on the follow-up end of things.

In my opinion, the goal should be to lift your overall revenue and/ or profit, even if that means doing something counterintuitive, such as *lowering* a certain conversion point. This big-picture, or timeline, view of CRO is one of the main reasons why I've been fortunate enough to have over 90 percent increases in conversion rates for my clients. It's also the reason why I was strongly encouraged to write this book.

Another component of HCRO is the concept of trying to convert *all* visitors. Traditional CRO typically seeks to optimize for the largest group of people only. But that still leaves out people who might convert, if they were presented with a different experience or offering. So, HCRO solves this problem by optimizing the entire business from a customer-centric perspective. We essentially create a unique optimized experience for every visitor, or as close to it as we can get. The more we lean toward a truly customer-centric and dynamic website, the closer we get to converting all people who come in contact with your business.

You're going to be amazed at all the ways you can grow your business using HCRO. But we need to go over a few terms and concepts before we can dive into all the other cool stuff I want to show you.

What Is Conversion, Anyway?

A conversion is nothing more than a transition from one state of being to another. You can convert from one religion to another. You can convert from one career to another. You can convert a cold call into a hot lead. You can convert a lead into a sale. It's a change from one thing to another.

Although the most obvious examples of conversion may revolve around religion or politics, it's no different in the world of business and online conversion. The goal is to transition anonymous people (your web traffic) into something more useful to you (leads, customers, or raving fans).

A conversion online can be pretty much anything you want it to be. It's the tipping point where a goal is reached. That can be a link clicked, a page read, a form submitted, a purchase made—anything that moves a person closer to your ultimate goal. Because this is a business book, let's assume that ultimate goal is probably to make more money (or to collect donations or spread education in the case of nonprofits).

Good. Now we know what a conversion is. But what is a conversion rate, and why should you optimize it? A basic conversion rate definition is the ratio of conversions over traffic. In other words, how many people saw a certain product divided by how many people bought it (if a purchase was the goal).

So if 100 people saw your web page for lawn furniture and 30 people purchased a set, then the conversion rate is 30 of 100—30/100, or 30 percent. This is just a basic example. There are many ways to define a conversion rate. We'll go over that in more detail later.

Some people believe the term *conversion rate optimization* was influenced by the widely popular term *search engine optimization* (SEO). People who practice SEO are optimizing their web pages so that they rank higher on search engines such as Google. The goal is to get the page as high as possible in the natural or organic (free) search results. People found over time you could do certain things to improve your page's odds of showing up first, or at least higher up in the results.

SEO has become a cutthroat business in some circles. Those who figure out a system that works can make millions of dollars from their kitchen table. Optimizing is their job. They research keywords, tweak copy, and manipulate their web pages all in the quest for traffic. CRO is just another kind of optimizing, but instead of optimizing for the search

engines, you optimize for conversions—more sales, more leads, more clicks, whatever you define as a conversion goal. Where SEO is about getting more traffic, CRO is about making more money.

This idea is nothing new. Technically, conversion rates have been around for a long time. Think back 50 years to the days when door-to-door salesmen were common. If they were good, they probably carefully monitored how many people they talked to (their traffic) and how many of those people bought an encyclopedia set or vacuum cleaner (their conversion). If they were good, the ratio of how many people bought versus how many people they spoke to could be considered a conversion rate.

If they spoke to 100 people, and 10 people bought, they'd have a 10 percent conversion rate. That might be pretty respectable, or it might be horrible. It all depends on what they're selling and who their target market is. If their conversions were particularly low, they might study someone more successful to learn better ways of selling, or they might tweak their sales pitch to relate better to the individuals they're talking to. In other words, they'd be creating a more customer-centric experience in order to make more sales.

Most successful businesspeople are continually optimizing for better conversions, whether they know it or not. It's how they improve and grow. Conversion rate optimization brings the same idea of improving conversions into the modern world of the online marketplace. But unlike the old days when everything relied on trial and error, we now have the technology to run tests and know for sure whether one sales pitch is working better than another. The direct-mail world runs tests all the time, but it can take weeks or months to show results. With online CRO, sometimes we can have the answer in just a matter of minutes.

The basic process works like this:

Step 1: Make a change to a web page or a step in your sales funnel.
Step 2: Test the new version against the old version, using special software.
Step 3: Wait to see which version returns more conversions. (The software tracks this automatically.)
Step 4: Keep the winner, and start over from the beginning with a new idea or change.

It's important to keep track of everything you're doing because one small tweak can affect other things way down the line in the sales process. With a good CRO understanding, or a smart consultant on your side, you can put systems in place to tweak and test all aspects of your marketing. It may not happen overnight, but I've seen even small changes to text or pictures on a web page bring about huge lifts in conversion. Even if you start testing without knowing what you're doing, just the act of testing things will help you start to see results.

Conversion Rate Optimization Is Not the Same as Usability

I want to make a quick distinction between conversion rate optimization and usability. It's important to mention here because they can seem similar. They do have overlap, but I believe it's a dangerous notion to think they are the same. I've seen people get tripped up by this and miss out on major opportunities. I've also seen people make usability changes in the name of profit and growth, and they wound up hurting conversions and negatively affecting their bottom line. However, I also know from experience that usability can also improve conversions.

The goal for usability is to make things easier for the user or visitor. The goal for CRO is to get more conversions and thus more money. They can sound the same, but they're not quite. When you make things easier for the user, you can sometimes hurt your bottom line. For example, we've tested strategies where we intentionally made things harder for the user and conversion rates went way up. You may be wondering how this could happen. In theory, conversion rates should go up if you make it easier for the visitor to buy, but that's not always the case.

About 80 percent of CRO overlaps with usability. But that 10 percent on either side of the overlap makes a huge difference (Figure 1.2). When people approach CRO like usability, they spend all their time focused on smoothing out the obstacles in the visitor experience. They try to make it as easy as possible for the visitor to buy. Although that might lead to higher conversions, it may not lead to the most *profitable* conversions.

This practice of smoothing the path, so to speak, is really in the realm of usability. For a company such as Zappos, where the goal is to keep the customer happy at almost any cost, usability may be smart. Keeping customers happy positively affects their bottom line because it is the core
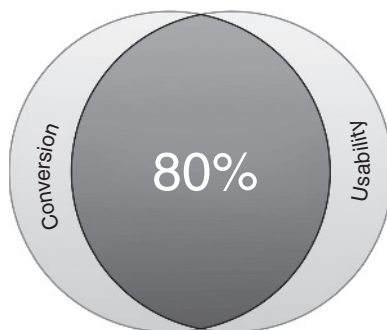
Figure 1.2   Conversion and usability do have a lot of overlap, but paying attention to the 10 percent on either side can make a huge difference to your bottom line.

of their business model and has led to great exposure. For example, they offer free shipping even though someone back in 2000 would have said it's totally inefficient and hurts the bottom line. In hindsight, we know that investment paid off.

Sometimes, to bring about a better conversion rate, you need to guide the visitor where *you* want them to go. Think about the shopping experience in an IKEA store. IKEA controls the complete customer journey, right down to arrows on the floor telling you where to go. There's a certain walkway you pretty much have to follow, and that walkway leads you past all of IKEA's displays (Figure 1.3). The floor plan forces every individual customer to see just about everything that is for sale. You can't easily skip over anything. This is a very conversion-focused idea.

Both Zappos and IKEA have dramatically different approaches, but both are highly successful.

Now think about shopping in someplace like Walmart. There you're allowed to go wherever you want, and they try to make it as easy as possible with store features such as wide aisles and plenty of checkout stands. Plenty of people go through Walmart without walking past every single thing they have for sale (Figure 1.4).

IKEA is known for their great customer experience. People love shopping there; because of the way the store is laid out, customers tend to buy more. Most don't realize they're being led through a carefully planned experience. If they do realize it, they don't mind. In most cases,
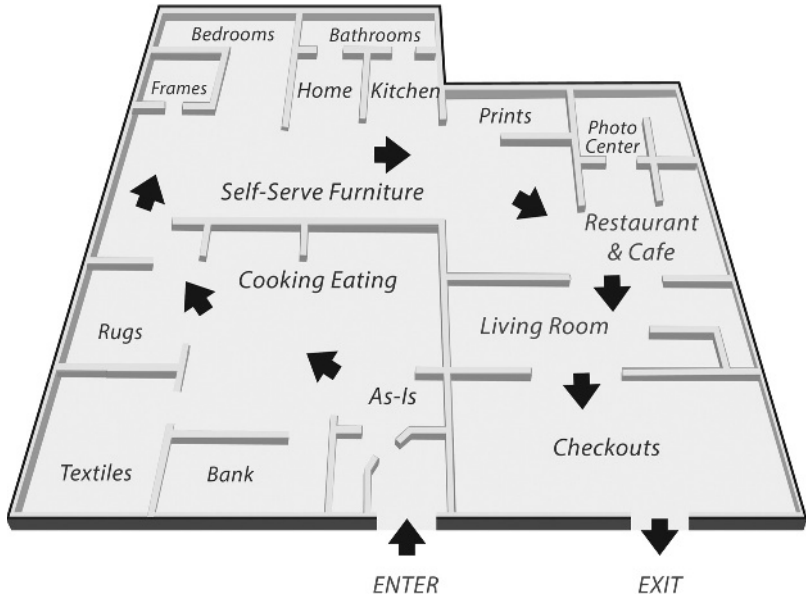
Figure 1.3   IKEA leads its customers through the desired path. Everyone gets the same experience. It's a highly optimized floor plan where the prospect is essentially forced to see everything.
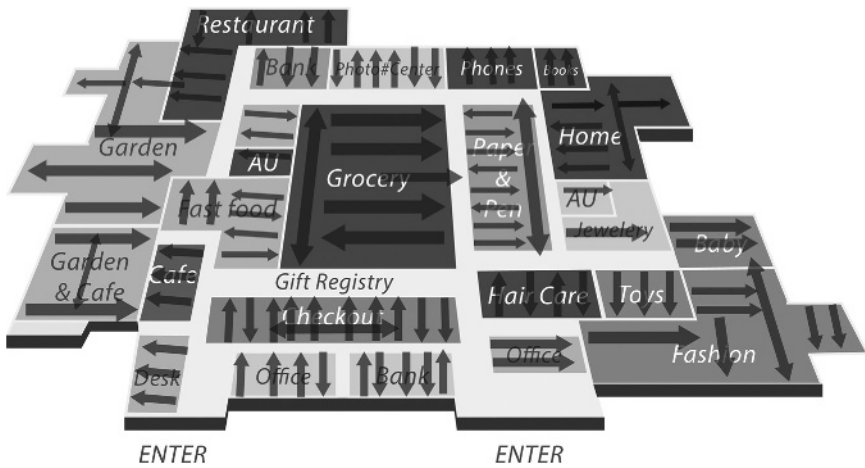

Figure 1.4   Unlike IKEA, stores like Walmart let people wander around the store as they desire. If the visitors do not already know the store layout, it can be confusing to find what they need. Both models work for the individual stores depending on their goals.

they love it and even become raving fans because of it. Thinking tradi-
tionally, IKEA is making things more difficult, but so what? Customers
enjoy the experience all the same (or even more) and wind up buying
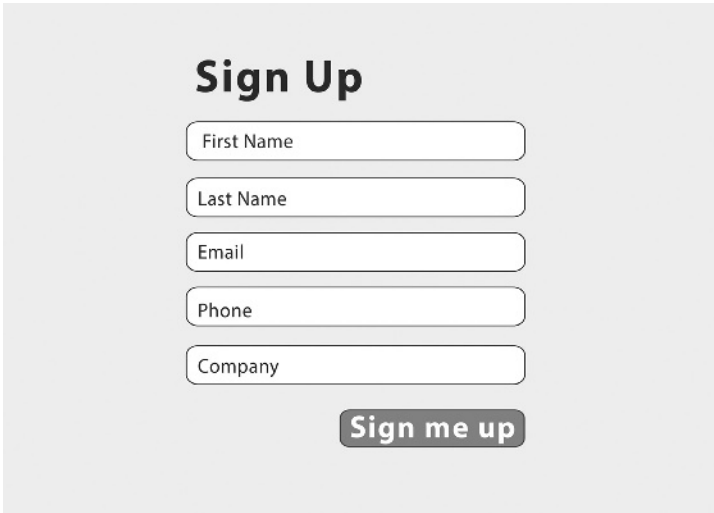more because of it.

If you've ever been involved in sales, you know sometimes customers
don't know what they want. Sometimes it takes longer to present what
you have to sell, and you have to direct their path so that they see every-
thing they need to see in order to make a purchase decision. Sometimes
web sales can improve if you don't make things overly accessible.

Different Types of Conversion Points

If the goal is to convert someone, there has to be a point at which that
happens. It's called, conveniently enough, a conversion point. Just about
any goal can be considered a conversion point, even something as small
as clicking over from an e-mail to a landing page or browsing to the next
page of a blog post. But there are some common types of conversion
points that you need to be familiar with. There are plenty of other ways
conversions can be measured, but these are five of the most common
ones.

1. Opt-ins
2. Clicking
3. Purchases
4. Call-ins
5. Engagement

Opt-ins are probably the most popular types of conversion points
because they're easy to measure and they represent an important step in
many sales processes. An opt-in happens when there's an exchange of
information—you offer something in exchange for the visitor's contact
information. Typically, at a minimum, you want to collect the person's
e-mail address. Most people think of an opt-in as someone opting in to
request information from you. The way I like to think of it is people are
identifying themselves to you in exchange for your offer. They are raising
a hand and identifying themselves as prospects to be engaged and sold.
Your job is to find more ways to get people to raise their hands. In fact,

Sign Up

First Name

Last Name

Email

Phone

Company

Sign me up

Figure 1.5   An opt-in refers to the act of someone opting in to receive something from you, to be added to your list, or to buy something from you. The opt-in is typically collected through a web form, such as the basic one shown here.

that's the conversion they are making. They convert from an anonymous visitor to a prospect (or lead), a real person who has entered a sales process.

You have a job to do with providing the right incentive for the opt-in. People are most likely not going to do it on their own just because they like you. The opt-in isn't just about them giving you their information. It's about giving them something worthwhile to get them to reciprocate. You have to persuade them to give you the info.

Opt-ins are usually made through a web form of some sort (Figure 1.5). The form may have only one field, such as e-mail address, or it may have many fields. I've seen forms more than 85 questions long! There are distinct strategies for building web forms and optimizing for maximum conversion. We'll start exploring that topic in Chapter 3.

Clicking is how we get around on the web. We click from one page to another or to get from an e-mail to an article. We're constantly click-ing links to take us where we want to go (Figure 1.6a). In this case, the conversion is the physical click. This conversion point will sometimes be referred to as a *click-through rate* (CTR) in pay-per-click advertising or an *open rate* for opening and clicking into e-mail. But no matter what you

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Cat Toys Now!

Figure 1.6a   This is an example of a paid advertisement that might come up on Google when you search for "cat toys." A click can be considered a conversion point. In this case it is known as a click–through rate (CTR).

Figure 1.6b   Typically purchases are made with a button such as the one show here.

call it, every click is a small conversion. Clicks provide valuable informa-tion and can move people along the conversion path, if skillfully applied. If not skillfully applied, a click can kill your conversion completely, such as when you include unnecessary outbound links on a sales page, and people click away instead of buying.

A *purchase* is an obvious conversion point, considering that making money is probably the ultimate goal here. There are lots of ways to make a purchase: order forms, shopping carts, mail–in, phone–in, in–person, and in–store. In most cases, a conversion is achieved when someone buys at least one thing. After that, the person may buy something else, but that person has still technically converted.

A *phone call* can also be a conversion point. Some business models rely heavily on a phone bank of sales reps to close the deal. I've had a good number of clients who use hundreds of sales reps. In this case, their main metric for conversion is the *call-in*. For them, success is based on the number of people who call in after visiting their website, how many convert into customers via the phone, and how much each step in the process costs them.

Engagement can also be a conversion point. Engagement is the act of getting a website visitor to interact in some way on the site. This could be navigating anywhere else on the same website, watching a video, or depending on the business model, any other form of interaction that's important to the business owner. This is typical with businesses that sell advertising on their websites, such as blogs and gaming sites.

Smaller Steps May Be Necessary

For every conversion point you may have, there can be many smaller steps leading up to it. We call these microconversion points.

What Do People Do When They Find Your Website?

- Do they browse around for a while?
- Do they buy something?
- Do they sign up for your newsletter or a free report?
- Do they just click the back button on their browser without even reading your site?

They probably do a combination of these. (And if you just don't know about any of this, then I'm really glad you're reading this book!)

More important, what do you *want* them to do? What's the goal? Every page on your website should have a goal, even if that goal is just to have visitors click through to the next page or the next article. Each goal is a microstep on the way to your larger, ultimate goal of making a sale or collecting a lead. Each microstep can also be a conversion point. Visitors may go from your home page to your product page. If people sign up for your newsletter, they convert from being anonymous visitors to known leads. You now know something useful about them, such as their first name and e-mail address. These small steps are called microconversions, and they are very important, especially if you're selling something expensive or relatively unknown to your target audience.

If you're selling sailboats, it's very important to educate visitors over time. People don't generally whip out their credit card to buy a sailboat the first time they see a website. It's a decision that takes education and trust built over time. It's usually a longer sales cycle. So it's probably in your best interest to make sure you have at least their e-mail address before they leave

your site. With that one piece of information in your hand, you can continue the conversation about your awesome boats through e-mail or other strategies, such as direct mail. It all depends on what other contact information you have on them. In this case, that microconversion is very important. It's important enough to measure carefully.

Bottom Line Conversion Is What Counts

If we're talking about microconversions as steps in a process leading to an ultimate goal, that ultimate goal is an increase in the bottom line. It's how much money goes into your pocket at the end of the day. That's the whole reason you want to optimize, right? When talking about the bottom line in CRO, we're talking about the revenue from the ultimate conversion point, or ideally even the net profit. I call this number the Bottom Line Conversion Rate.

Let's take a look at the imaginary sailboat website again. If 100 people come to the web page and only one person buys, there's a 1 percent conversion rate. That rate might be okay, but the company owners would like to do better. So, they make some changes here and there. Maybe they changed the pictures on the page, or made the order button bigger, or improved the descriptions a bit. If two people buy, the company now has a 2 percent conversion rate. In theory, they just doubled their income without paying any more for advertising or traffic generation. Sweet!

You may have heard other CRO consultants explain microconversions from a mathematical perspective. In theory, from a mathematical standpoint, each microconversion lift adds to the next point in the process. So, if you increase the conversions in one step by 10 percent, you are theoretically increasing the bottom line by 10 percent.

Unfortunately, it doesn't work that way. In reality, not every microconversion lift is going to improve your bottom line. It's taught this way because it's an assumption that is often made in order to serve as a clear measurement of the optimization and testing process. However, the actual results vary.

For example, if you get more people to click from Google to a landing page, that's good, right? You should get an income boost. But if that landing page isn't converting well, then your bottom line may not go up. In fact, if you get the wrong people clicking through because your

targeting is off, you could wind up paying for useless traffic and your bottom line could go down.

The reality of CRO is there are almost always variables at play that make it not perfectly quantifiable. They don't always fit nicely in a math equation. We're measuring human behavior, and behavior isn't an exact science. Microconversions are still important and do contribute to the bottom line. It's important to remember that microconversions can have a domino effect (good or bad) on other conversions later in your sales process.

That's one of the reasons my consulting firm does things differently than other CRO companies out there. That's why we often use the term *Holistic Conversion Rate Optimization*.

What Is Holistic CRO?

It's important to look at the big picture, including the traffic stage (what happens before visitors get to the website) and the follow-up stage (what happens after they leave the website). Sometimes better online sales mean lower off-line or e-mail sales. How can that happen? Very easily. Imagine you sell beds online. You sell the most beautiful, most comfortable, most amazing beds ever. You make a good living, but you hear about this "new" CRO thing and decide to give it a try. So you make changes to your website that lift conversion of first-time website visitors to an all-time high of 36 percent. You're thrilled! You're making more money online than you ever have before. You start planning that cruise to the Bahamas you promised your family when you first opened the business.

But hold on a minute. Part of your sales process (your funnel) included direct mail. Before you made the change, people would come to your site and want a bit more education before deciding to purchase. They would call you up and ask questions. Then they'd think about it for a while. In the meantime, you sent them some direct-mail postcards, which had a high conversion rate. People would get the postcard in the mail and go back to your website. But now they find a website that doesn't match the look or the offering on the postcard. They get confused and don't buy.

You wind up *losing* a significant amount of the sales you used to get from the postcards. Your bottom line goes down. Also, it costs a lot of money to print and mail thousands of postcards, so three months later

you're trying to figure out why your sales are up but profits are down. Bummer.

Now, this is a hypothetical situation, but in this example the business suffered because they didn't look at *both* the online and off-line components. Another problem with focusing on the microconversions is people tend to get hyperfocused on optimizing one page to death. They tweak and tweak and make tiny changes all over the place, when they might get much higher lifts by going back to the drawing board, being creative, and trying a completely different approach. If you pay attention only to microconversion rates alone with CRO, you could be missing the boat.

I've been involved in scenarios where we quadrupled the size of multimillion-dollar companies in a few months just by looking at things from a holistic perspective. Although that much of a jump is not typical, higher growth paths are much more feasible with Holistic CRO. I believe strongly that HCRO is what has allowed my company to see these kinds of opportunities so often.

Likewise, if you pay attention only to the bottom line conversion rate, you're missing out on a lot of other opportunities because you have no idea what is driving that conversion. If you know what's driving conversion, you can drive it up in other places, too.

HCRO means you look at your entire marketing funnel—your whole platform, online and off-line—before and after people land on a website. They are all part of your process, and they all feed into your bottom line. When we talk conversion with clients, we're paying attention to their *entire* business so we don't miss something important that could lead to huge boosts in income or devastating losses.

It may seem overwhelming to factor in all the variables from dozens, or hundreds, of microconversion variables from all your different marketing streams and wind up with a cohesive plan. But that's exactly what you can do with HCRO. Over time, you'll start to make sense out of the confusion so that the lifts and drops in conversion are measured and understood in terms of the big picture.

Holistic Conversion Pyramid

The key to getting started is in understanding the Holistic Conversion Pyramid (Figure 1.7). This is a model I developed to explain the difference between Holistic CRO methods and traditional CRO methods.
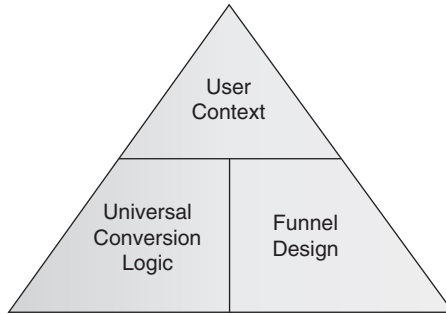
Figure 1.7 The Holistic Conversion Pyramid illustrates the three components to a holistic conversion strategy: Universal Conversion Logic, User Context, and Funnel Design.

There are three components to any holistic strategy:

1. User Context
2. Universal Conversion Logic
3. Funnel Design

What Is Universal Conversion Logic?

Most conversion consultants (and business owners figuring it out for themselves) limit themselves to using what they've read are best practices at first. These are the tips and tools you can find online or in books that tell you things like when to use one color over another color, how many columns to have, or how much white space should be on a page. They're all the techniques people think generally work to lift conversions.

The place I want you to start is called Universal Conversion Logic (UCL). This is the psychology *behind* what makes a red button work on some websites and a green button work on other websites. UCL is why on English-language websites, you may want things to flow left to right, but on Hebrew or Arabic sites, you may consider flowing right to left, for example. Logic suggests people will tend to consume information in the direction they are used to reading. The problem with taking best practices at face value is every site is unique. What worked great for one company might fail miserably for yours. If you don't understand the logic behind the best practice, you won't know why it failed (and you won't know how to fix it).

When working with CRO, most people just stop at the best practices. They don't take into account user context or funnel design. But I'm betting you're smarter than that, so let's look at these other two pieces of the conversion puzzle.

What Is User Context?

User context combines everything about the people behind the screen: who they are, where they came from, where they're sitting, what they know, and what they don't know. It also includes the *setting* of the audience and their *intention* or reason for being on your website.

- Are they sitting in front of a desktop computer at work or browsing on their iPad?
- Are they searching to buy a product to solve a particular problem, or are they just surfing around looking for information?
- Have they been to a website like this before and have certain expectations?
- Are they experienced with websites like yours or are they novices?
- Where are they coming from: a search engine or a media campaign?
- How close are they to being ready to buy?

These details are all part of user context. The more you know about the context of the user, the more customer-centric you're able to get.

Every person is different. Take my wife, Jenna, and me, for instance. We are individuals, with different strengths and weaknesses, different learning styles and buying behaviors. We both process information and make decisions differently. If you put us each in front of a computer and give us a task, we're both going to solve the problem in different ways. (And, really, I might just delegate the task to someone else entirely.)

The user context plays a big part in what conversion logic you may want to use to lift conversions.

What Is Funnel Design?

Your funnel is essentially your marketing and sales process. It's a series of steps that lead the visitor through your website or other marketing and sales tactics toward the ultimate conversion point or goal. You might have several funnels, depending on your business model. Funnels include your microconversions and a bottom line conversion rate (Figure 1.8).

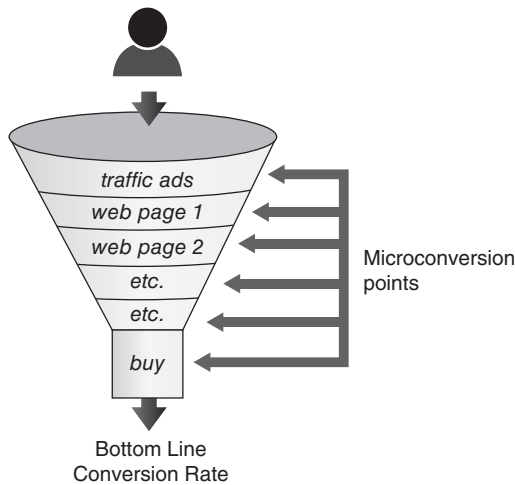**Sales and Marketing Funnel/Process**

Figure 1.8   A funnel is your sales and marketing process. In order to have a good understanding of your funnel(s), it's important to know all the steps a person takes from your traffic source, through your website, and all the way down to the Bottom Line Conversion Point.

I've found that user context and funnel design are the most important things to understand and are the least understood, even in the CRO industry. These concepts create a framework from which to run tests and improve your bottom line. When you intentionally consider all three parts of the pyramid equally, you are starting to think more holistically about CRO.

As we dive deeper into various conversion strategies and techniques, remember to keep all three elements of the pyramid in mind. Designing your funnel is the first step (we'll be getting to that in the next chapter). You're going to need to know as much of your user's context as possible to do a good job. After that, you will want to consider user context again for each microconversion point you decide to optimize. Finally, you will use your knowledge of Universal Conversion Logic to help more users move through your funnel.

Now that you know what HCRO is, the next chapter will dive deeper into the first piece of the Holistic Conversion Pyramid: creating effective funnels.

Build Your Skills

The skills lab for this chapter will help you practice coming up with the user context for your own company.

You can find this skills lab at www.ConvertEveryClick.com/chapter1