CLICK!

How to Encourage Clicks Without Shady Tricks

by Paul Boag

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To the regulars in the Boagworld Slack channel
(you know who you are).

You have been a source of support and inspiration
throughout the writing of this book.

When work gets tough, I know you are there for me.

Thanks.

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CHAPTER 1

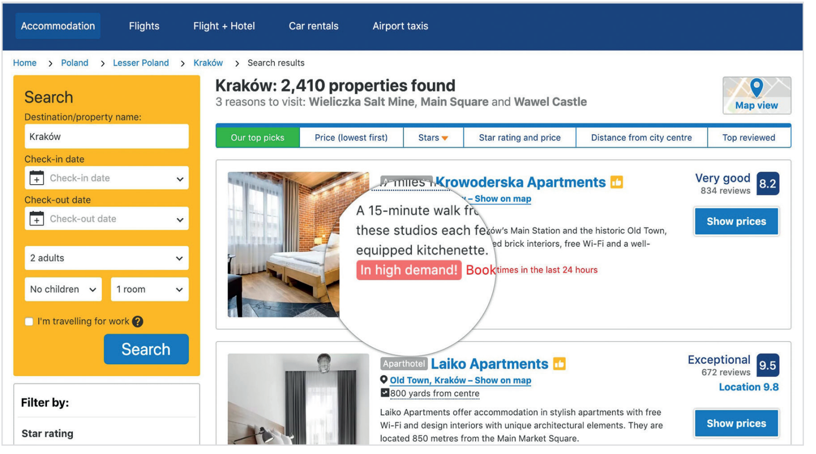
The Dangers of Persuasion

I remember the precise moment I decided to write this book. It is a moment we have all experienced in one form or another on the modern web.

I had an upcoming business trip that involved booking a hotel and flights. But I could have been purchasing almost anything on the web and encountered the same kind of problems.

I went to book the flights. After a somewhat frustrating experience, I eventually found the flights I wanted and proceeded to check out. I reached the payment page before I realized the airline had sneakily added travel insurance to my order. Coverage I neither required nor requested.

Things didn't improve when I went to book a hotel. I eventually found a hotel ideally positioned for my needs, but the site was quick to warn me that only three rooms were still available. Moments later, it displayed a notification that one of those rooms had gone and that twelve other people were looking at this hotel.



Sites like Booking.com attempt to create a sense of scarcity.

Of course, like everybody else, I knew damn well what they were trying to do. The site was trying to use scarcity to motivate me to book.

The entire experience left me with a bad taste in my mouth. Is this what the web has become? It reminded me of a quote from Obi-Wan Kenobi in the original Star Wars. Has the internet become a “wretched hive of scum and villainy”?

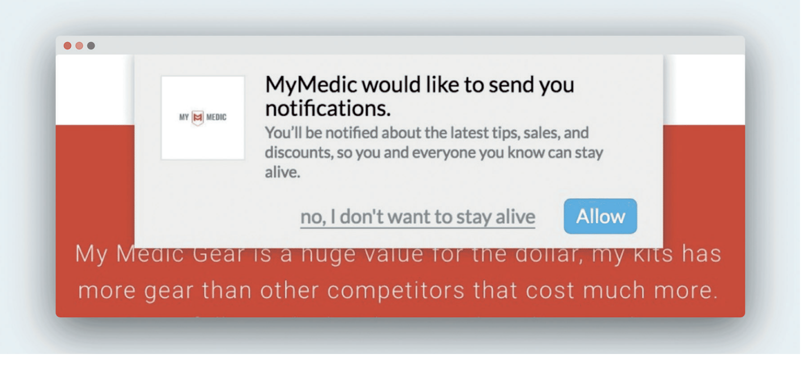
I am certainly not alone in feeling this way, especially about the travel sector. It has reached the point where government bodies are intervening. In the UK, the Competition and Markets Authority (CMA) announced:

> *The CMA has taken enforcement action to bring to an end misleading sales tactics, hidden charges and other practices in the online hotel booking market. These have been wholly unacceptable.*[1]

1 https://smashed.by/cma

The investigation that followed identified some concerns mainly focusing on the use of psychological manipulation to encourage impulsive bookings; in particular, the tendency of these sites to inflate the popularity of a hotel to push users to act quickly.

And this is not a problem limited to the travel sector. It increasingly feels like most websites set out to manipulate consumers into doing something. These practices have become so commonplace they now have a name: dark patterns. The term "dark pattern" was coined by Harry Brignull and refers to a user interface element that is carefully crafted to trick users into doing things they might not otherwise do.

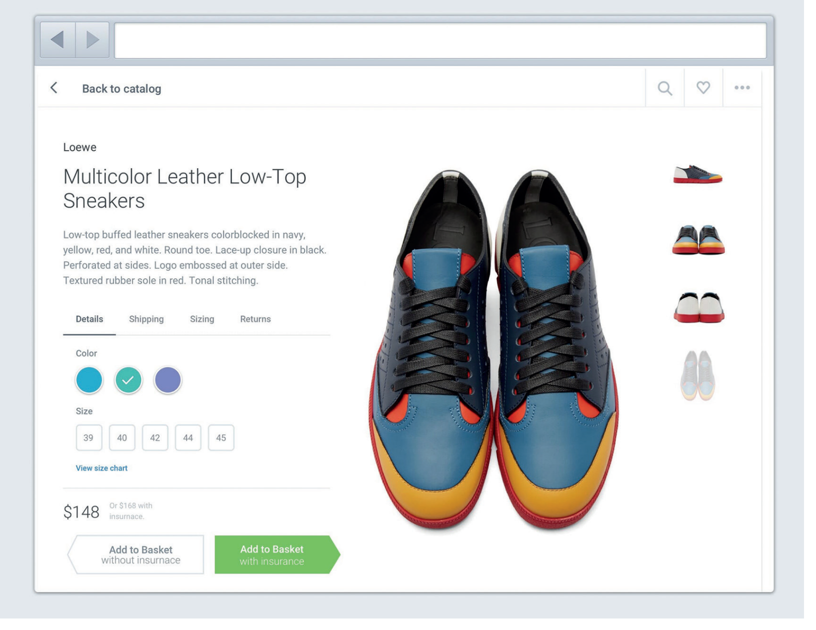


Copy that plays with people's emotions can be used to encourage action.

The thing is, dark patterns work, even when you know a site is trying to manipulate you. I might have known that the hotel site was trying to trick me, but on a subconscious level it would still work, and the company would see an increase in their conversion level because of this dark pattern.

In truth, you can get people to act against their own interests with some effective design decisions and well-written copy.

Imagine for a moment you wanted to sell insurance to go with a user's purchase of a pair of shoes. Surely somebody can't be persuaded to buy insurance for shoes! Believe it or not, it is not as hard as you might think. Just take a look at the mockup below.



Just press the green button to buy. Go on!

Design cues combined with the fact that most users do not read instructions can trick them into taking certain actions. I can pretty much guarantee that the sales of insurance for shoes would skyrocket, not because people wanted coverage, but because I tricked them into it.

Yes, I clearly label which option doesn't include insurance, but all the visual cues encourage users to click the button with insurance. It is highlighted in a bold, inviting color and, most importantly, it looks like an arrow pointing onwards instead of backwards like the button without insurance.

The design takes advantage of the fact that users are often in too much of a rush to read copy properly and instead rely on visual cues to work out what they should do next.

But just because we can trick people into ordering insurance with their shoes doesn't mean we should.

The subject of ethics in web design is hotly championed by many passionate individuals but it's not the topic of this book. I take a more pragmatic attitude toward the whole subject. When the pressure is on, people can convince themselves anything is ethical and justify whatever they feel they need to do.

It is important to remember that many digital professionals are under massive pressure from management to improve online conversion rates. You might even be one of them. In such situations, preaching ethics isn't going to change people's behavior, because people under pressure can convince themselves of anything.

After all, even my example makes it very clear that it adds insurance to an order, so how can it be unethical? I went as far as writing it on the button!

Don't misunderstand me. I am not suggesting we all give in and start using dark patterns. But my objection to dark patterns does not stem from ethical concerns. I object to them because I believe they are bad for business and because there are better options available. That is the topic of this book.

If we are to stamp out dark patterns and make the web a better place, we need to talk about more than ethical considerations. We need to provide management with a solid business argument against their use, and offer a viable alternative. That begins by understanding some fundamental changes in the marketplace.

The Rise of the Empowered Consumer

The manipulation of consumers to encourage sales is not new. Anybody who has ever watched the TV series Mad Men[2] knows it has been around since the dawn of the modern advertising industry. Ethical or not, businesses have been treating consumers as a cash cow for decades. So why stop now?

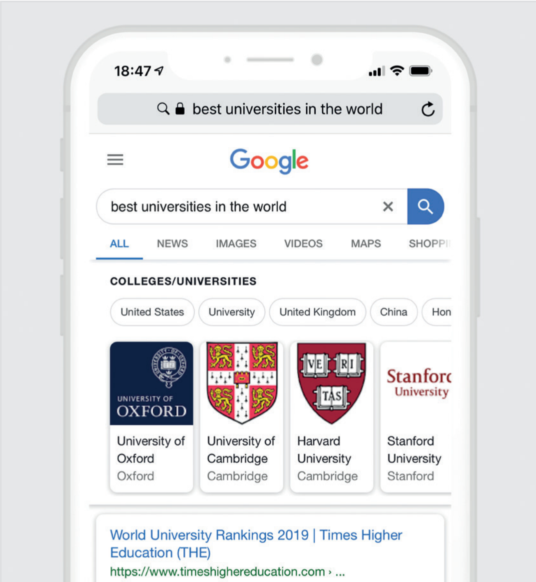
The reason is simple. There has been a fundamental shift in the power dynamic between customer and company. To demonstrate this point, let me take you back in time an embarrassing number of years to 1990 when I was applying to university. It was a different world then, with no mobile phones and no internet (or information superhighway as we would soon call it!)

I had to choose where I wanted to study and, to be honest, my choice was limited. My older friends shared their thoughts on the places they were studying, and my tutor at college recommended one or two places, but that was it. I think I saw an advertisement for my local university at the cinema and another one on TV, but that was it.

Going on this rather short list, I then wrote to three or four of these institutions asking them to send me a printed prospectus. I used these to narrow my selection down to two that I visited in person before making my final choice. That decision was made purely on my impressions and those of my parents. I had no information to go on other than what they told me on the open days and in the prospectuses.

Now think about the experience of young people today as they choose a university. They have the names of every university on

2 https://smashed.by/madmen



We have every option for any purchase in our pockets.

the planet in their pockets, with instant access to detailed information on those universities and the courses they offer.

Not only that, but they also have instant access to everything everybody has ever said online about those universities. While my knowledge was limited to what a university told me about itself, they can access the opinions of students who attend or have attended the university, as well as details of any accreditation and awards they have received.

What a huge difference. A difference that applies to pretty much any product you care to mention and which has fundamentally redefined the relationship between customers and brands. But also, a change that has altered consumer behavior.

Let's take a moment to break down two of those differences: an explosion of choice, and a wealth of information.

THE IMPACT OF UNPRECEDENTED CHOICE

Consumers love choice – or to be more accurate, consumers say they love choice. In truth, based on countless studies, we often deal with choice extremely poorly. Making a decision becomes overwhelming due to the many potential outcomes and risks that may result from making the wrong choice. We find choosing mentally draining and often fail to make a decision at all.

Hick's law[3] (named after psychologist William Edmund Hick) states that there is a direct correlation between the number of choices and the length of time it will take us to reach a decision.

What does this mean for our businesses and online conversion rate? Well, with every option from all of your competitors in their pockets, consumers are faced with overwhelming choice. Choice we are ill-equipped to handle.

Our response to this overwhelming choice is to reduce our options to something more manageable as rapidly as possible. That leads us to dismiss options based on very superficial criteria. For example, if a website loads too slowly there is no reason why users need to hang around; they move on to the next possible supplier.

Of course, site load time has little to do with the quality of service the company in question is offering. But with so much choice, why wait? Why not just move on to the next one in a plethora of options?

An abundance of choice has led us to prioritize the easiest option over the best, because finding the best is just too time-consuming. Not that consumers are entirely without help in narrowing their options. There has been an explosion of sites offering feedback

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3 https://smashed.by/hickslaw

We rely heavily on ratings to narrow the huge number of options available to us.

on companies from other customers. Ratings and reviews have become a critical component in people's decision-making process.

Just think about your own experience of buying something on Amazon. Search for almost any product on Amazon and you see an overwhelming number of options. So how do you narrow those options? Most of us filter by price and, more importantly, rating.

Then, when we click through on an individual product, most of us skip over the product description and go straight to the reviews. We value what our peers say over what the company says about its product.

These kinds of deep and independent insights into a product have led to a savvier consumer, and also one who is considerably more empowered.

THE RISE OF EMPOWERED CONSUMERS

Not only do consumers have more choice than ever before, they also have a voice. If you go back 25 years, there were very few consequences if a company provided a customer with a poor experience. In most cases it would be limited to the customer moaning about the company to friends and family.

By contrast, today's world is very different. For a start, most people have a far larger social circle and communication to that circle is both instantaneous and spontaneous.

With the average number of Facebook friends at over 150, and Twitter followers over 700, a customer's reach is considerably wider than in the past. And they can inform their entire follower base of their dissatisfaction in seconds, right from the phone in their pocket.

But complaining to friends and followers is just the start. The web also amplifies the customer in three other ways too.

First, it connects disgruntled customers. It is easy for customers who have had bad experiences with the same company to connect and act together. Most famously, one disgruntled Dell customer unified others dissatisfied with the company's customer service by publishing a blog post, "Dell Lies. Dell Sucks.[4]" The resulting PR backlash reportedly knocked a third off of the company's share price.[5]

Second, one mistake can go viral, devastating a company's image. The video of a United Airlines passenger being physically removed from a flight quickly undermined the company's already beleaguered reputation and caused some to boycott the airline.

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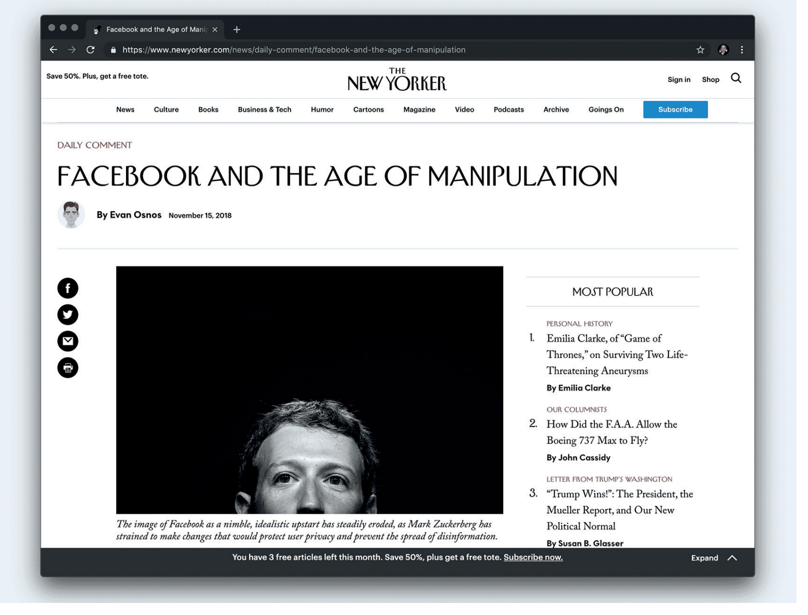
4 https://smashed.by/lies
5 https://smashed.by/dellhell

Finally, and most significantly, the web has enabled customers to post negative reviews of companies and these businesses now understand that a bad rating can seriously impact sales. Review sites like Tripadvisor or Checkatrade can make or break a company's ability to secure new customers.

Review sites like Checkatrade can make or break a company's ability to secure new customers.

Although these criticisms of companies have historically been mainly about customer services, that too is changing. We are beginning to see a growing backlash against the dark patterns this book is a response to. For a long time, the criticism of manipulative techniques was limited to design and marketing blogs, but increasingly those criticisms reach the mainstream.

Facebook in particular has come in for a lot of criticism for its manipulative techniques. But the stories around the manipulation employed by tech companies are educating consumers about the broader and more entrenched culture of manipulation that has existed in sales and marketing for generations.



Companies are increasingly facing negative press for their manipulative practices.

We now live in a world where consumers are increasingly aware when they are being manipulated and, now they have a choice and a voice, they are less inclined to put up with it.

Why am I telling you all of this? Why am I repeating something you probably already know, and certainly something I have touched on in my other books? I am talking about this shift in power because understanding changes in consumer behavior gives us insights into how we can persuade consumers to buy without resorting to the failing manipulative techniques of the past.

Of course, to use less manipulative techniques, we first need to persuade our clients or managers that this is a better approach.

How Manipulation Is Damaging Your Business

Those who propose the use of dark patterns are not bad people in most cases. They are people under pressure to meet targets and keep a business growing. They resort to manipulation out of what they see as a necessity. For them, dark patterns are an answer to the challenges they face. After all, they do work and will indeed increase sales.

The problem is that dark patterns come with costs that are not immediately apparent to a manager or client under pressure. Costs that are ultimately damaging to the business as a whole. Costs that often go unidentified, leaving management under the impression they make sense.

It is not always apparent to the casual observer that there is a link between the introduction of a dark pattern and negative consequences seen in other parts of the business. In part, that is because companies are organized into silos and one department is not always aware of what another section is doing.

What are the business costs of dark patterns? They fall into two areas:

- the enormous impact of buyer’s remorse
- the hidden marketing costs of manipulation

The second of those is by far the biggest, so let’s address that first. It also demonstrates how there is not always a clear relationship between manipulation and costs.

THE HIDDEN MARKETING COSTS OF MANIPULATION

Let's be honest: most manipulative sales techniques are driven by sales and marketing departments. Departments under increasing pressure to improve conversion rates and sales numbers. These metrics determine success and so marketing and sales will do almost anything to move these needles. If manipulative dark patterns cause a tangible and immediate improvement in conversion, why wouldn't you use them?

This is especially true when seen against the general backdrop where advertising spend seems to be becoming less and less effective. The need to convert customers is therefore higher than ever. With customers seemingly more reluctant to buy, it leads us to resort to ever more desperate techniques.

But are we actually caught in a vicious circle? Could it be that the very reason consumers are less willing to buy and more resistant to marketing is because we are undermining trust with the manipulative techniques we adopt?

As we have already established, manipulative techniques make customers increasingly distrustful and more likely to complain about a company. Could this be the reason many companies struggle to convert customers at the rate they once did? Could it be that they are reading negative reviews and comments from existing customers?

Think about it for a moment. Marketing and sales rely heavily on goodwill for success. Word-of-mouth recommendation is a significant factor in marketing reach, as well as sales. Equally, trust is a crucial ingredient in any transaction between two people. Manipulation undermines those.

If your company is struggling to attract and convert new customers this could well be because people distrust your brand. If your marketing spend isn't as effective as once it was, it could be because much of that spending power is simply being wasted on overcoming the negative attitudes around the brand.

Another warning sign that something is not right is lifetime customer value.

Is customer turnover high compared to competitors or has it declined since adopting more aggressive sales tactics? If so, this could be due to the adoption of such tactics. Are customers spending less than they used to or below what you would expect? Perhaps they are put off because they don't trust that your company has their best interests at heart.

But surely customers are unaware that a site is manipulating them, so why would they distrust the company? I would challenge that assumption. Do you realize when a website is manipulating you? I suspect you do.

I once ran usability testing on a popular hotel booking website when one of the participants suddenly announced, "I hate all this manipulative crap. I just ignore it." He knew what the site was trying to do, and believed he didn't let it influence him. In reality, it probably did. The point is, however, it annoyed him and left a negative impression.

Of course, when I claim dark patterns are undermining your marketing efforts, I am making a lot of assumptions. There may be other reasons for the decline in sales. But most companies do not know one way or another. They are happily implementing dark patterns without being confident that they do not have unintended side effects. Dark patterns may generate more sales in the short term but if that comes at the cost of increased marketing spend as the company haemorrhages existing customers, then is it worth it? I would suggest that having a loyal base of customers who stick with the company over the long term and passionately promote the company to friends and family creates a healthier business.

But as I have already said, aggressive sales techniques do not only cost a company in marketing and sales, they also cost the business in other ways. In particular, it gets expensive dealing with customers who suffer from buyer's remorse.

THE HIDDEN COST OF BUYER'S REMORSE

Imagine for a moment you were the poor customer who got tricked into adding travel insurance to a flight. It is possible you would never notice. It is also possible that you noticed, but couldn't be bothered to correct the problem. However, a significant proportion of people will want to get their money back.

The kind of techniques becoming so prominent on the web at the moment are designed to manipulate people into doing something they do not want to do. But sooner or later the user wakes up and regrets their decision. That is the point it starts costing the business.

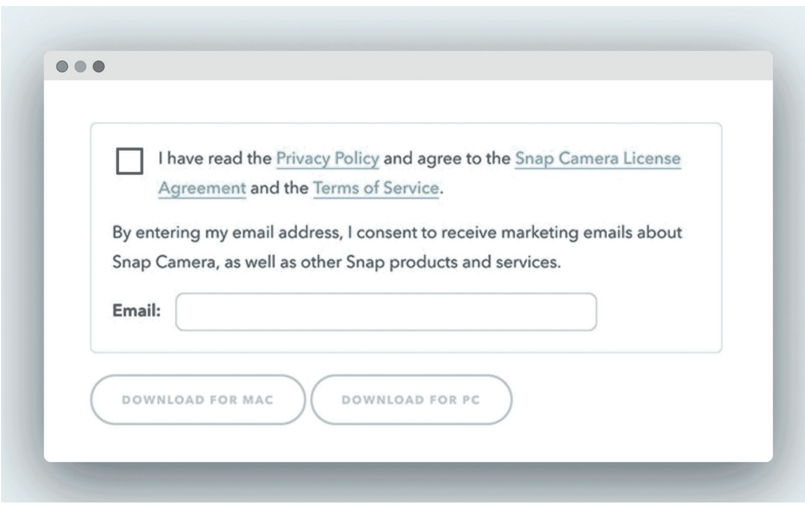
First, the user will reach out to customer support and it costs the company money to handle that complaint. If an unhappy customer picks up the phone and calls a company it costs on average £3.50 per call.[6] Even if they use live chat or email, an employee needs to read and respond to these enquiries, all of which costs the company money.

6 https://smashed.by/callcosts

Then there is the cost of processing returns. For a physical product this can become very expensive as restocking a product can be both time-consuming and in some cases impossible. Even if it is not a physical product, there is still the cost of processing refunds or handling disputes when a refund is not going to be issued.

Not that all manipulative techniques used online are focused on placing an order. Newsletter sign-up is another common area where dark patterns lurk. Surely there is no cost to buyer's remorse there? Wrong!

If someone ends up on a mailing list without granting explicit permission, it can cost a company a lot. Worst-case scenario: a company has to defend itself against a legal challenge. Even the more common response of marking your emails as spam can cost a company. Other emails from your company can be blocked by filters, effectively reducing your marketing capabilities.



Forcing people to sign up to a newsletter can lead to that newsletter being blocked from legitimate subscribers' inboxes.

In short, the cost of unhappy customers can be substantial for a business. Unfortunately these costs are not always visible, especially to those instigating the use of online manipulation.

I worked with one client who perfectly proves this point. Let's call them Acme Electronics. Acme Electronics sold consumer electronics, such as toasters, kettles and microwaves. The head of e-commerce had grown sales year-on-year for the best part of a decade but was beginning to struggle to meet the ambitious goals set by management. Management had seen great success in the past and expected her to improve on that in the future.

In short, the cost of unhappy customers can be substantial for a business. Unfortunately these costs are not always visible, especially to those instigating the use of online manipulation.

The head of e-commerce had achieved that growth by fixing the obvious flaws in the old website, and now that work had been done there were fewer opportunities for growth. In desperation she hit upon an idea. She would increase the average order value of kettles by automatically adding a hard water filter to customers' baskets. She reasoned that users could always remove it if they didn't want it. Of course, users often didn't remove it because they didn't spot it. The result was a significant jump in the number of filters sold and the head of e-commerce was one step closer to meeting her end-of-year target.

When I started working with the company, I pointed out that this was a classic dark pattern[7] and was best avoided. She argued vigorously against me, pointing to the increase in sales. The filters were not expensive, but cumulatively had a significant impact on the company's sales because kettles were their number-one seller.

7 https://smashed.by/basketsneak

Now, I am a pragmatist. If something works, I don't feel it is my place to lecture clients about morality. It is their decision as to whether a practice is ethical or not. However, I suspected the rosy sales figures were not telling the whole story. I contacted the returns department and found out that, sure enough, the company had experienced a massive increase in returns of filters since the change to the website.

In fact, together with the head of returns, we calculated that the cost of processing returns was costing the company money. That wouldn't have been a problem if the number of returns was only a fraction of the sales of filters. But that wasn't the case. It turned out that the automatic bundling of filters with the kettles was costing Acme money.

Why had nobody spotted this? Why hadn't the returns department questioned the spike in returns? Why hadn't the head of e-commerce checked on the impact of her decision as I had? The answer lies in the way most companies are structured.

The chances are that, like Acme Electronics, your company is organized into departmental silos with each silo responsible for its own areas. In that kind of organizational structure, departments focus on meeting their own targets and rarely think holistically about the whole organization.

As long as e-commerce sales were going up, the head of e-commerce was happy. She wasn't responsible for returns and so didn't even consider the broader ramifications. She was doing her job well and that was all that mattered. Similarly, the head of the returns team was not too concerned. He was measured on how efficiently returns were processed and not the number of returns. It wasn't his problem.

I asked him what he would have done if he had realized that filters were being returned because they were bundled with kettles. He answered that he probably wouldn't have done anything. He said that sales strategy wasn't his job and his colleagues wouldn't have appreciated him interfering.

The whole situation at Acme Electronics was a mess, and yet they didn't even know it. They were oblivious to the risks they were taking with their brand and profit margins.

Not a Risk Worth Taking

All of this goes to show that tricking people into taking action on our websites is not only unethical, but it is also simply not a risk worth taking. It has the potential to undermine marketing efforts, cost the company money in returns and support calls, as well as reduce repeat business and customer lifetime value.

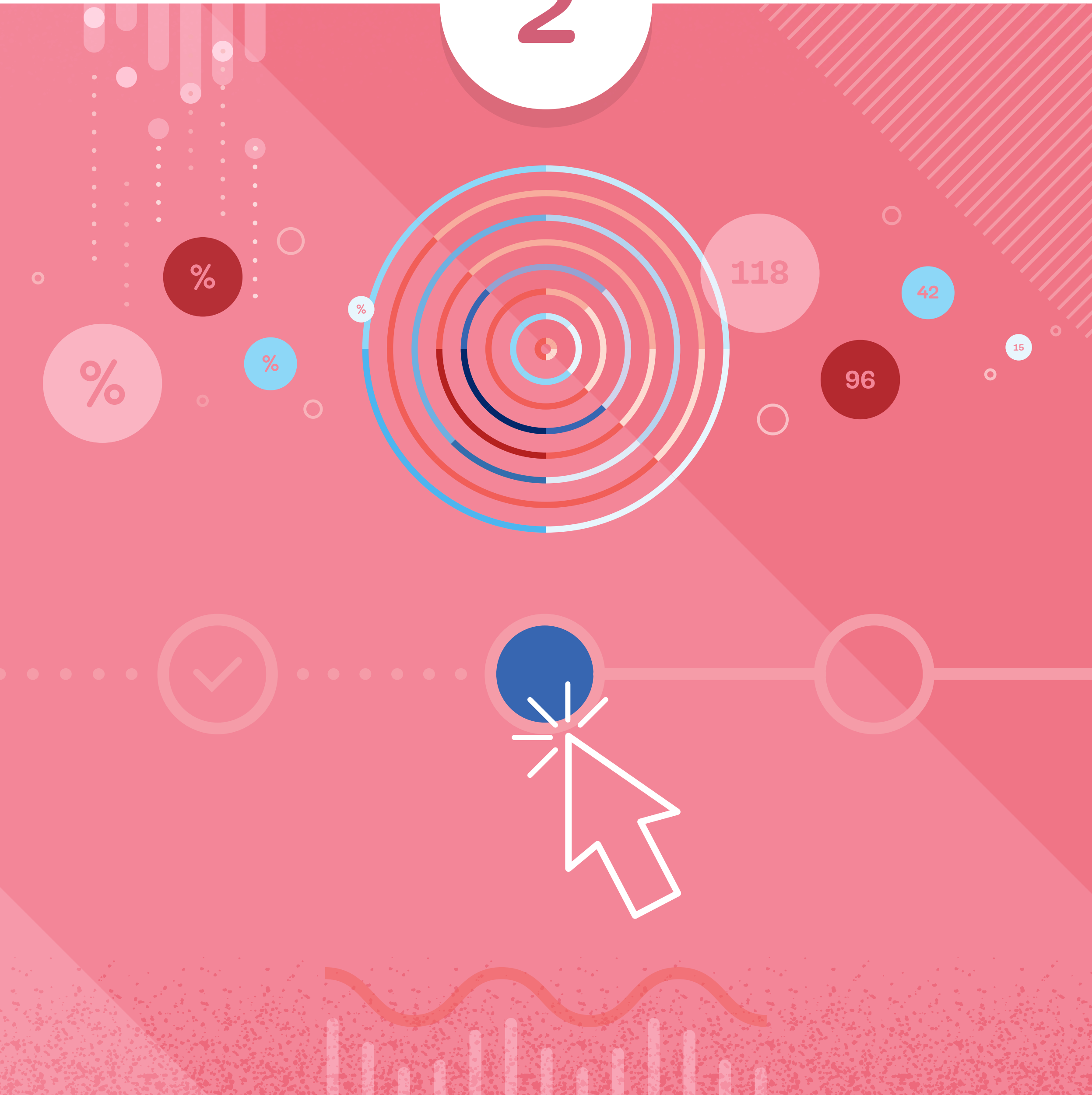
So that leaves us with a problem. If we cannot use dark patterns, then what is the alternative? What was the head of e-commerce at Acme Electronics supposed to do? What are you supposed to do if you are in a similar position?

The first step is to reevaluate how we measure success. We need to look carefully at the metrics we use.

How to Measure Conversion Effectively

CHAPTER

2



CHAPTER 2

How to Measure Conversion Effectively

“We need your help.” I was on a call with a major retail brand. “We feel our website is underperforming and want to increase its effectiveness.” So far, so typical. I had had many similar conversations over the years.

“How do you measure success?” I asked. “What are your key performance indicators?”

“We can’t really measure them,” they replied. “It is too complicated, and our back-end systems cannot support that yet.”

“What makes you think your site is underperforming. then?” I asked. “We just feel it should be doing better for the amount we invest in it,” they responded.

I sighed.

You cannot make improvements to a website if you do not measure its performance. Neither can you increase a conversion rate if you do not know what that is. Many organizations do not measure success in any meaningful way. Even those who try often focus on the wrong things, as we will explore in this chapter.

I know what you are thinking. When are we going to get to the bit where I introduce you to techniques that will increase your conversion rate? But as you will discover as you read upcoming chapters, if we do not measure our conversion rate effectively, we cannot hope to know how to improve it.

The techniques for improving a site's conversion rate rely heavily on our ability to measure it. Beyond that, a failure to measure a site's performance in conversion and elsewhere has more serious ramifications, not just to digital channels but your business as a whole.

The Consequences of No Metrics

I am shocked at how many digital projects lack any agreed measures of success. Organizations routinely redesign websites because "they look a bit out of date" rather than with a specific measurable goal in mind. With no clear objective, how can you judge if that redesign has succeeded in increasing the conversion rate? Equally, I have seen mobile apps commissioned and maintained at considerable expense because a senior executive just decided the organization needed an app.

A lack of metrics can seriously undermine any project, but it is particularly absurd for digital projects when accessing high-quality data on the deliverables is embarrassingly easy.

PROJECTS WITHOUT VALUE

The biggest danger of not insisting that every project has a set of measures by which your organization can judge success is that it leads to an explosion of vanity projects. Projects that provide no real value to the business or users, but exist to justify or amplify the role of a member of staff.

I have worked on a depressing number of these over the years, from quasi-government bodies to university research groups that are interested in nothing more than securing next year's funding. The only reason they have a website at all is that they are required to create one. In such an environment with no clear objective, how are you meant to increase conversion or demonstrate success?

PROJECTS WITHOUT DIRECTION

The result of these kinds of vanity projects is that they are typically directionless. Because the people commissioning the site either don't know what they want to achieve or are not honest about it, the site lacks clear objectives and success cannot be measured. Even when there is a vague idea of what they want to achieve, many organizations aren't clear about how to translate that into measurable goals. Too often success criteria are nothing more than vague aspirations, like increasing sales or improving engagement. But what do these mean in practice?

NO WAY TO JUSTIFY INVESTMENT

There is another more personal consideration, however, one that we need to think long and hard about if we are responsible for building and running digital channels for our company or clients.

Without a way to measure the success or otherwise of the websites we create, we have no way to prove the value of our work. That means we will struggle to justify our fees, our jobs, and further investment in the site in the future.

Define the Value of Success

Experience has taught me that the clients most willing to invest money into their websites are those who run e-commerce sites. They can see a direct monetary return on every dollar spent. They can see that the more money they put in, the more they get out.

Many sites lack that clear relationship between investment and return. In such situations we must work with stakeholders to create that relationship by defining metrics we wish to improve and, where possible, associate a monetary value with those. For example, if your stakeholders decide they want to increase the number of newsletter sign-ups, don't stop there. Work with them to establish what percentage of sign-ups turn into leads and what percentage of those leads convert. Then associate an average value that comes from each customer. That will allow you to work out a value for each newsletter subscriber.

I am aware that to establish the kind of numbers I outline above, there will probably be a significant degree of estimation, and that is OK. You have to start somewhere, and colleagues will be quick to let you know if they think your numbers are unrealistic, and you can adapt them accordingly. What this approach does is get you thinking about metrics in terms of financial return. Without that, you will struggle to get further investment in the site. Having no measurable metrics means that any expenditure on the website can feel like a black hole into which your organization pours money.

If you want to justify further investment, avoid vanity projects, and provide focus to the sites you build, you will need measurable success criteria. But how do you agree on these?

How to Define Success

Organizations typically measure success by defining a set of key performance indicators (KPIs). These are quantifiable measures used to evaluate the progress of your site over time. But deciding what these metrics are will not always be easy, especially when it means soliciting agreement from multiple stakeholders.

START WITH THE COMPANY STRATEGY

A good starting point is the overall company strategy. Most organizations have a plan outlining broad goals they are aiming to achieve. That might be increasing revenue, decreasing costs, or extending market share.

COMPANY OBJECTIVES	WEBSITE GOALS	SITE KEY PERFORMANCE INDICATORS
Increase Revenue	Generate More Leads	Increase in online forms submitted. Increase in visits to contact page.
Decrease Costs	Reduce Support Queries	Increase in visits to support section. Decrease in support tickets.
Improve Market Share	Increase Online Visibility	Increase in number of shares. Improved search engine visibility.

We need to turn vague company goals into measurable key performance indicators

DEFINE WEBSITE GOALS

Once you have these broad organizational goals, seek to identify ways that a high performing website could help to achieve them. That might be generating more leads, reducing support queries, or increasing the number of shares on social media.

MAKE WEBSITE GOALS SPECIFIC AND MEASURABLE

Finally, turn these criteria into something measurable. For example, generating more leads might be measured by the number of contact forms submitted, while reducing support queries might be a drop in the number of people phoning the company.

Be as specific as you can realistically measure with each of these criteria. Lack of clarity often leads to disagreements internally over whether a site has been successful or not. For example, you might agree that the website should increase the number of leads generated, but what kind of leads?

You could argue that you have achieved your objective when more people submit an enquiry form. Surely this means you have successfully increased your site's conversion rate? But if all those enquiry submissions are from people who do not have the budget to buy the company's products or services, you are just creating an overhead for the sales team to respond to. Because their time is wasted following up on poor quality leads you reduce their effectiveness and the company's overall conversion rate.

Equally, if you had a metric to reduce the number of support tickets, that needs to be matched by something like an increase in customer satisfaction ratings; otherwise, you could hide the method of submitting a support ticket and call it a success.

That is where you need to be aware of the dangers of tracking the wrong metrics.

The Consequences of Bad Metrics

Measurable KPIs for a website can be a double-edged sword. On the one hand, they can be incredibly beneficial by encouraging investment and focusing projects. But if those metrics are not right, it can cause problems. It is easy to end up focused on the wrong thing or to have too narrow a view. Metrics can also set up unrealistic expectations.

Remember the e-commerce manager I mentioned in the first chapter who bundled filters with kettles? She ended up doing that because she came under increasing pressure from senior management to maintain a steady increase in her metrics. She had succeeded in a certain level of improvement in previous years, and management expected her to continue that improvement. She had been successful in the past by fixing obvious problems. Once those had been addressed, maintaining the same level of growth became harder. The metrics had set up a false expectation.

The result is almost always a blame game. Those responsible for conversion blame marketing for driving poor leads, and marketing blames them for a failure to convert. One business silo accuses another and overall company effectiveness declines.

The lesson here is not to become too obsessed with your metrics: they are often less than perfect. The numbers can only ever be an indicator of success, and as you will see shortly, we need a range of metrics to ensure success.

Another reason to establish a range of metrics is that if we focus on the wrong measurement, it can damage the site's overall performance. For example, focusing purely on conversion can result in annoying pop-up overlays and manipulation that will hurt long-term customer satisfaction and sales, as I mentioned in the first chapter as the dangers of persuasion. To avoid these problems, seek to have a mix of metrics that balance one another.

Balancing Your Key Performance Indicators

Typically, I attempt to have a mix of three areas to ensure balance. These are:

- conversion
- usability
- engagement

Let's explore these in more depth.

TRACKING CONVERSION

The most obvious metric to track is conversion rate. Ultimately, the majority of websites exist to persuade users to take some form of action. These actions often create a tangible financial benefit for the company.

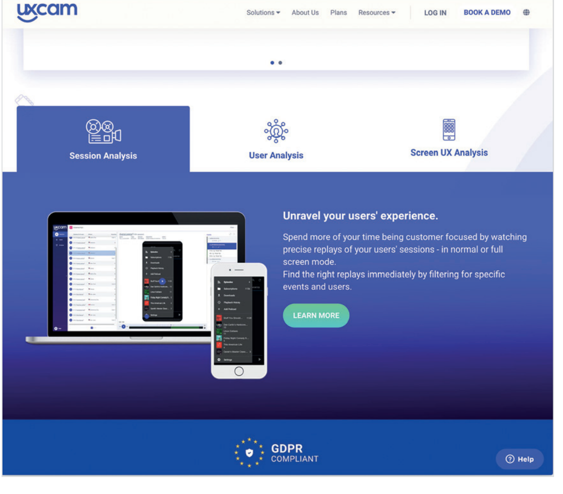
Measuring your conversion rate can appear deceptively simple. Yet even the most basic call to action can be harder to track than you might expect. For example, what should we measure and how do we know whether the numbers we get back are good or bad?

Let's look at three common website conversion points and break down exactly what you should be measuring and how to judge success. These are:

- an e-commerce transaction
- a user who makes contact
- a user who initiates a download

Let us begin with the simplest of the three: a download call to action.

Measuring Your Download Website Conversion Rate
Whether it is downloading a PDF ebook or a piece of software, surely tracking downloads is straightforward? Unfortunately, that is not necessarily the case. For a start, just because somebody downloads something doesn't mean they do anything with it. That ebook may sit unread on a user's file system until they eventually delete it. Equally, those who download an app often delete them after trying it for only a few minutes.



Tools like UXCam allow you to track the usage of your downloaded app.

Although not always possible, in an ideal world, you need to track usage, not just downloads. Perhaps your ebook has a call to action of its own that you can monitor, or maybe you can add monitoring software to your app.

Then there is the question of who is downloading. Is your download getting into the right hands? Are you reaching the right audience? That is why marketers sometimes ask for a little bit of information from a person before they can download. Of course, this creates a usability hurdle, and a balance has to be struck.

Finally, there is the question of where the users downloading have come from. We need to be able to track the referral path a user took to get to the download. For example, if most people downloading have come from a particular Facebook ad, you want to know that so you can focus your marketing budget there. But knowing the referrer doesn't just apply to an external source like Facebook. It is also useful to understand where users who download something have been within your site. That helps you analyze whether some pages are working better than others and help you optimize accordingly.

The same is true for any conversion point. It is just as important to know which referral source led to users being most likely to contact you.

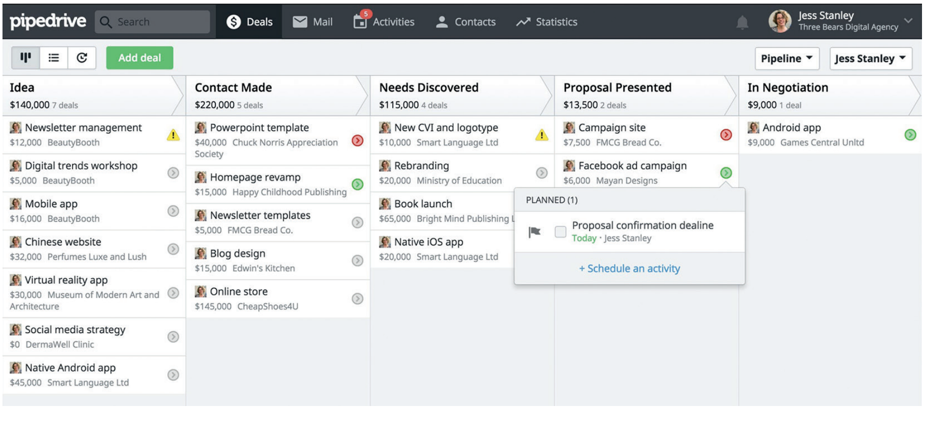
Tracking Users Who Make Contact

Referral sources are not the only thing to consider when users make contact. We need to think about how people are contacting you. Sure, it is easy to track users who communicate with you through a web form. But what about those who phone or email? These are conversions generated through the website too, and so you need to track these as well. Fortunately, you can address this by using a unique telephone number and email address on the website. However, you do need to keep track of people who use these channels.

We also need to measure not just the quantity of enquiries, but the quality too. The problem with tracking quality is that it requires human interaction to follow successfully. Somebody needs to make a judgement call about the lead and record its quality in a way they can report on later.

Some websites try to qualify leads when they are submitted online. This almost always results in asking the user more questions, which ultimately reduces the conversion rate or drives people to pick up the phone instead.

There is no magic solution to this problem, although a good customer relationship management system can help. But even if you have to track a lead through your company manually, it is work worth doing.



A good CRM system like Pipedrive allows you to track a website lead to the point of conversion.

Without that information, you will never discover whether one referral source attracts better customers than another, or be able to estimate the profitability of online campaigns.

Being able to track a user from initial contact to a signed contract opens up a world of possibilities, not least of which is the ability to calculate a financial value to your conversion rate. As I said earlier, being able to attach a monetary value to conversions makes a huge difference because it justifies investment in the website and other digital channels. That is why e-commerce sites typically see higher levels of investment.

Calculating Your E-Commerce Conversion Rate

In some ways, tracking e-commerce is the easiest, but the abundance of data available also allows you to dive into much more detail than you would with other types of conversion. That can prove overwhelming. So let's take a look at some of the website conversion metrics you could be tracking.

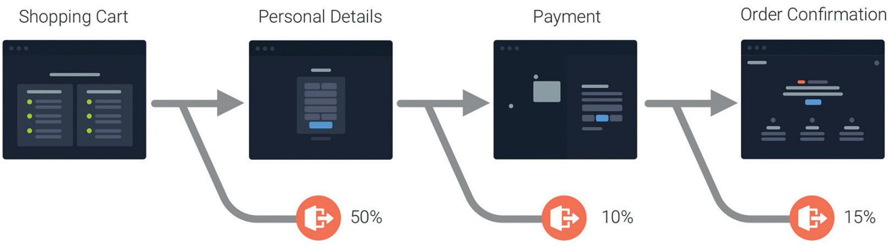
Shopping Cart Abandonment

A typical drop-off point on any e-commerce site is the shopping cart: users add items and yet never progress to purchase. It's a useful metric to track because you can test various methods of encouraging people to buy. If you don't track shopping cart abandonment, you cannot know whether your improvements have the desired result.

Checkout Abandonment

Even if people progress beyond the shopping cart, there is no guarantee they will make it to the end of the checkout process. There are numerous reasons why users might bail on the purchase, from frustrations over data entry, to not having a payment method to hand.

To identify these problems and experiment with possible solutions it is necessary to track behavior at each step of this process.

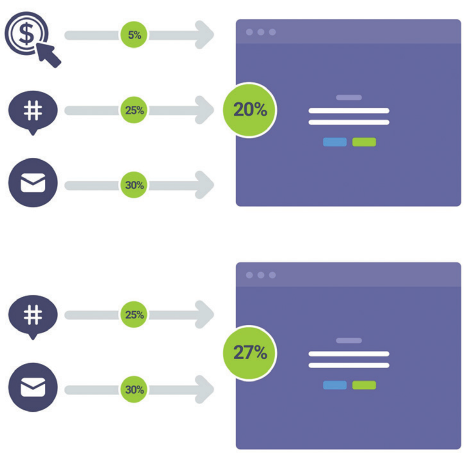


Knowing where users abandon the checkout process allows you to identify points to optimize.

Conversion by Referral Source

Users will reach your website through different channels. Some will be organic, such as search engines and backlinks, while others will be paid, such as Facebook ads or sponsored posts.

Whatever the case, it is essential to know which of these referral sources have a better chance of conversion. Understanding this will enable you to focus your money and time on building these successful referral sources over those which perform less well.



One under-performing channel can pull down your entire conversion rate.

New vs Returning Visitor Conversion Rate
Not only do different referral sources convert at different rates, so do different types of users. For example, it is good to be able to compare new with returning customers and how they convert differently.

It could be that discounts for first-time buyers are boosting new user purchases, while alienating existing customers who resent not receiving those discounts. Or maybe loyal, returning customers are masking the fact that your website is inferior at attracting and converting new people.

It is only possible to discover these problems and fix them if you can segment these audiences and compare their conversion rate.

Value per Visitor
Value per visitor allows you to see how much revenue your site generates for every person who visits the website. It is calculated by taking the website's total generated revenue and dividing it by the number of visitors.

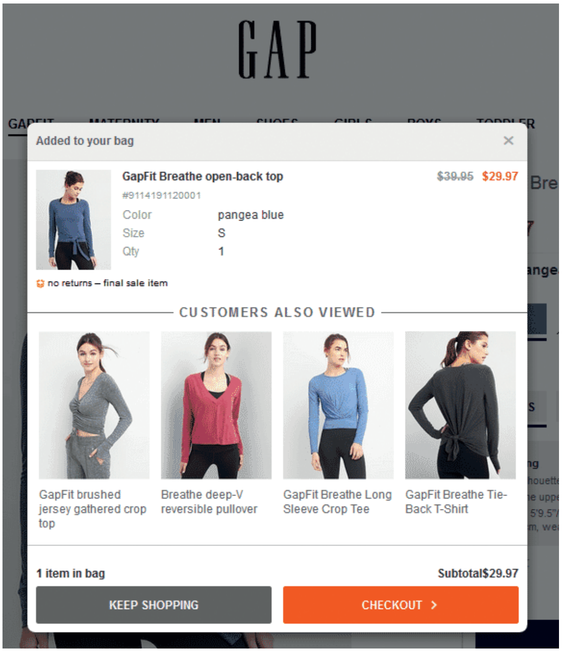
As a website conversion metric, it is useful for showing the overall performance of your website. And it is particularly useful for calculating how much you can spend on paid acquisition through Facebook or Google advertising.

It can also be useful for assessing the quality of visitors to your website. A low value per visitor could be a sign that you are targeting the wrong type of people.

Average Order Value
The time will come when your website conversion rate begins to stagnate after you have fixed the most glaring conversion

issues. At this point, you can either focus on driving more traffic to the site or encouraging each person who does buy to spend more money.

By tracking the average order value, you can see exactly how much each person spends and seek to improve this metric through upselling and cross-selling on your site.



When you track your average order value you can tell if your attempts to upsell are working.

Lifetime Order Value

The lifetime order value is one of those website conversion metrics that can be hard to calculate but provides a lot of value. For a start, it will allow you to understand better how much you can afford to pay for customer acquisition. If you know a customer will spend a considerable amount over their entire purchasing history, you can afford to make a loss on their first transaction by overspending on acquiring them.

Second, tracking your lifetime order value justifies expenditure on customer retention by providing an outstanding customer experience. Customer experience is a major influence on how much customers ultimately spend with a company.

Tracking the lifetime order value can often be done through your e-commerce platform or sometimes your accounting software. If not, however, then you can do it manually. The first step is to calculate the *average order value*: take your total revenue for a given period and divide it by the number of orders placed.

Next, you need to know how often people purchase. Using the same period you used for average order value, take the total number of orders and divide it by the total number of customers. Now you have the average order value and the frequency, you can calculate the *customer value*. This number is the average order value multiplied by the purchase frequency.

Finally, to calculate the average lifetime value, you multiply the customer value by the average customer lifespan. That can be calculated based on an average taken from your existing client base.

Cost and Profit per Website Conversion

Finally, every e-commerce merchant should track cost per website conversion. Organizations must know how much it costs to win business. You can calculate this figure by adding up all of the costs associated with winning a piece of work and dividing it by the number of conversions.

These costs will include the cost of advertising, marketing staff, sales staff, and running the website itself. Admittedly, some of these figures might have to be estimated, but measuring something is better than measuring nothing.

Also, if you know the cost per conversion, you can guesstimate the profit per conversion. This is the amount of profit made on each order based on the average profit made on a sale, minus the cost of conversion. Once again this will probably be an educated guess as the margins on a sale will vary wildly based on many different factors. However, thinking about profit per conversion prevents you from overinvesting in your website and advertising channels.

I am aware that being faced with all of these metrics can feel overwhelming and it might seem impossible to calculate them. But I would encourage you to try, even if you have to make some educated guesses. As long as you understand the metrics aren't perfect and don't become obsessed with them, something is better than nothing.

What is important to take away is the critical role metrics play in conversion rate optimization; otherwise you will have no way to know whether any changes you implement make a difference.

There is one last question I want to address: how do you know if you are performing well? Against what, exactly, do you measure success?

What Should I Measure Against?

A common question I hear is, "What is the average conversion rate?" I am sure this is a question that somebody could answer, but the answer would be meaningless even if you were comparing similar products.

Imagine for a moment you knew the conversion rate of your closest competitor's website. It would either leave you feeling despondent because your rate was lower, satisfied because it was on a par with yours, or overjoyed because you were ahead of the game. But how does any of that help? You either end up being complacent or conclude your whole website is rubbish and needs replacing. Neither scenario is helpful.

Stop worrying about what the average is or what your competition is doing. Instead, focus on improving your own metrics over time. You will never finish – but that is the point. You can always improve, and you cannot afford to stand still.

The idea of measuring against yourself applies not just to conversion rates, but also for tracking usability.

TRACKING USABILITY

Measuring usability is often overlooked in favor of focusing on conversion. But ignoring usability as a metric can have a significant negative impact on the long-term health of your business and will discourage users taking action.

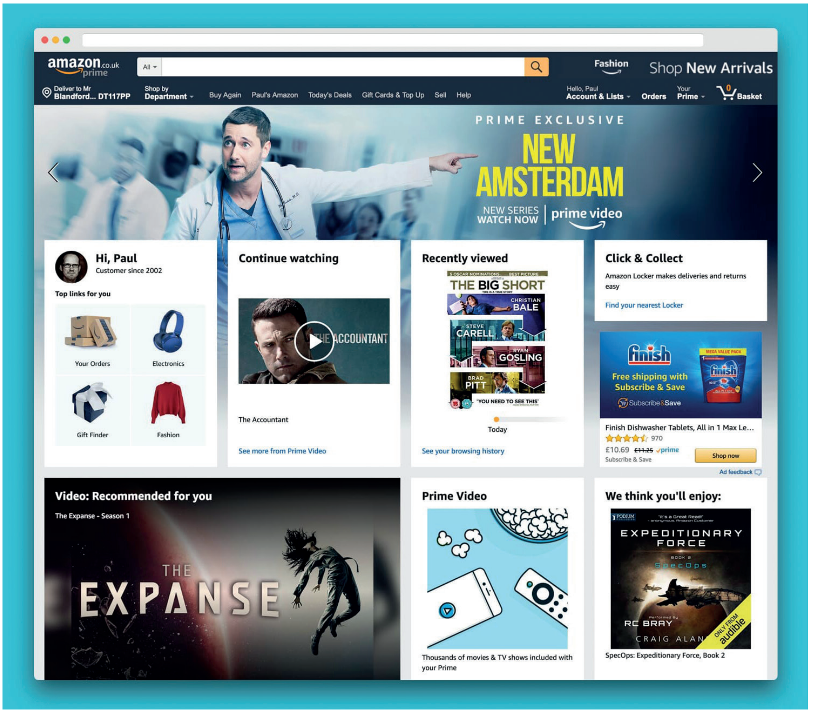
Why You Should Measure Usability

Usability underpins everything on a website. A website can be unattractive, unengaging and even poorly written and it may still convert. If people cannot use a site, however, taking action becomes impossible. Worse still, users have an extremely low frustration threshold when using a site: why would a user struggle with a problematic website when there are so many competitors to choose from?

But good usability can provide a distinct business advantage too.

Every Christmas I say to friends and family that they can have whatever they want as a gift, as long as I can order it from Amazon. I know Amazon, and so for me it is easy to use.

My familiarity with Amazon is an important factor in my loyalty to that site – and I am not alone. Users tend to be faithful to websites they find easy to use. Such faithfulness increases a customer's lifetime value, allowing companies to pay more for customer acquisition and so outperform competitors in pay-per-click listings.



Like many, my bias towards buying from Amazon is down to the fact that it feels comfortable and familiar.

Customers will even pay a premium for a straightforward experience: if your website is easy to use you can potentially charge more! The original Apple iPod is a classic example of this. It was overpriced and had fewer features than many of its competitors.

However, it was easy to use and quickly came to dominate the market. Ease of use sells!

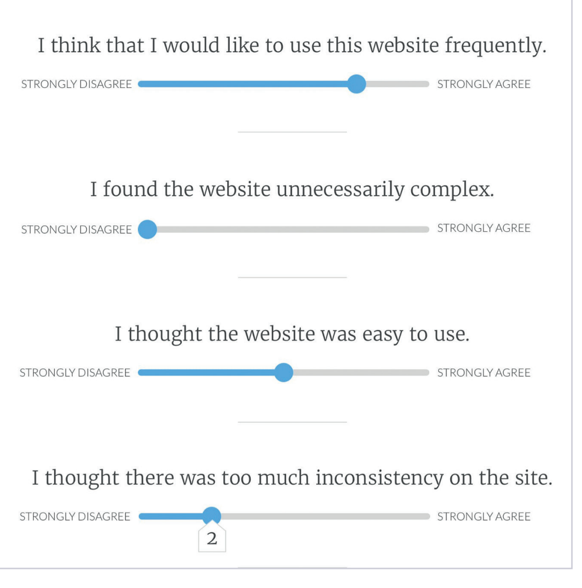
How, then, do you know if your site is easy to use? How do you measure its usability?

Measure Your Site's Overall Usability

There are many ways to measure a site's usability. However, most of the options are relatively time-consuming to implement, which means they do not happen regularly and that makes it hard to track the effectiveness of site improvements over time. Most organizations need a cheap, quick method of measuring usability and that is where the system usability scale[8] comes in.

The System Usability Scale

The system usability scale is a simple survey that asks users to express their level of agreement with a series of statements.



The system usability scale is a simple survey for measuring perceived usability.

8 https://smashed.by/systemusability

Participants rank each statement from one to five based on how much they agree or disagree. Five means they agree entirely, while one means they strongly disagree..

The system usability scale has a standard set of statements, meaning you can easily compare your website with any other and the universal average of all user interfaces. These statements are:

- I think I would like to use this website frequently.
- I found the website unnecessarily complicated.
- I thought the website was easy to use.
- I think I would need the support of a technical person to be able to use this website.
- I found the various functions in this website were well integrated.
- I thought there was too much inconsistency in this website.
- I would imagine that most people would learn to use this website very quickly.
- I found the website very cumbersome to use.
- I felt very confident using the website.
- I needed to learn a lot of things before I could get going with this website.

The only change I have made to the default survey is to substitute the word “website” for the typical phrasing of “system.” That makes it clear to the participant what the statements refer to.

How to Calculate Your System Usability Scale

Notice how the statements above alternate between positive and negative statements. The first statement is positive:

> *I think I would like to use this website frequently.*

while the second is negative:

> *I found the website unnecessarily complicated.*

For each *positive statement* take the user's score and subtract one. So, a count of four would become three.

For each *negative statement* subtract the user's score from five. So, if a user scored a statement as a five, then the final score would be zero.

Once you have a number for each statement, *add these together and multiply the total by two-and-a-half (2.5)* to give you a score out of one hundred.

All of that mathematical gymnastics is a bit fiddly, but there are resources out there that can help you, like this Excel calculator[9] created by Satori Interactive. The effort in calculating a score is worth it as it gives you an easy rating out of 100 for measuring usability, a metric that allows you to track improvements over time.

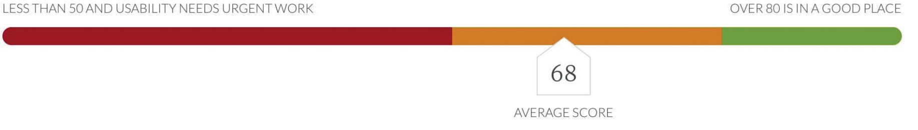
How to Use the System Usability Scale

Once you have the hang of it, the system usability scale opens up a world of possibilities. For a start, if you use the standard statements, you can get a reasonable idea of how usable your site is when compared to other systems in general.

9 https://smashed.by/excelcalc

The average system usability score is 68[10] and anything above 80 means you are in a perfect place. However, anything approximately 50 or below and you need to prioritize usability fixes.

What your system usability scale score means



The average system usability score is 68. Anything below 50 should be of concern.

You can also use the system usability scale to compare your site with the competition by asking users to rank multiple sites.

The system usability scale can further be used to rate a prototype against an existing site or to compare multiple design approaches.

The Limitations of the System Usability Score

Although the system usability scale is an excellent way of measuring a site's usability and, by extension, the impact of usability on conversion, it is not perfect. The system usability scale suffers from two flaws.

First, it can only identify how good or bad the usability of a website is. It cannot diagnose *why* it is succeeding or failing. Second, there is often a discrepancy between what a user says and reality. Somebody might describe a website as easy to use because they are familiar with it. Equally, they might say they will recommend that site to others in the moment of completing a survey, but not actually do it.

10 https://smashed.by/sus

We cannot only rely on the system usability scale. We also need to measure how users perform when completing critical tasks on a website.

How to Measure Usability of Critical Tasks

If you want users to complete a call to action on your website, taking that action has to be easy. But how do you know if signing up for your newsletter, buying a product, or completing your contact form is, in fact, easy?

What Task Metrics to Measure

For that kind of specific action, the system usability scale will not help. We need a different type of usability metric explicitly tied to our calls to action. We need to measure a series of factors, such as:

- the time it took the user to complete the action
- the number of users who utterly failed to complete the task
- whether the user was able to complete the call to action using the most direct route
- the average number of mistakes the user made when trying to complete the task

Fortunately, these various metrics do not all have to be measured separately. We can ascertain all of them by watching real users complete tasks.

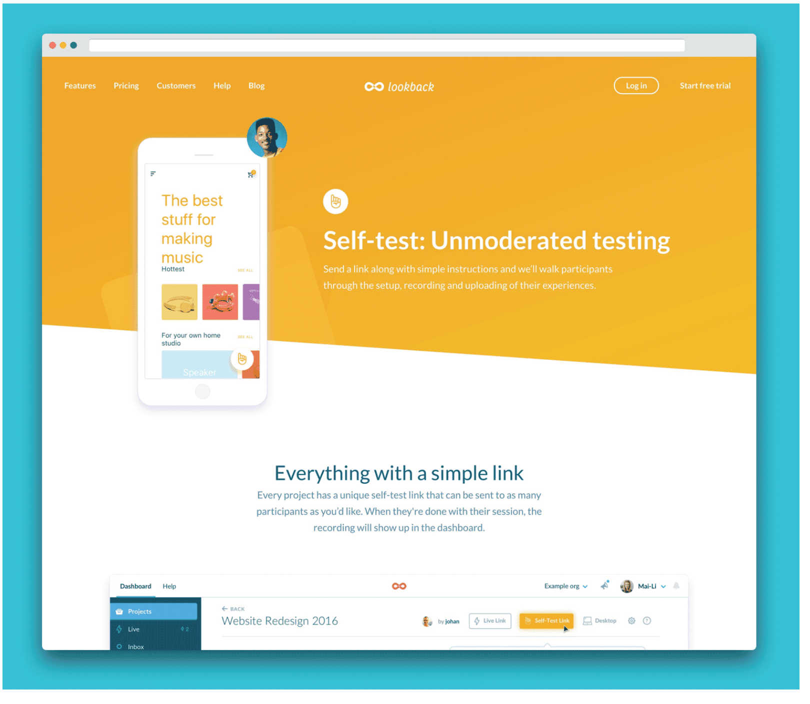
How to Measure Task Metrics

You can track task metrics when running any facilitated usability test session,[11] as long as users are being asked to complete the appropriate tasks. However, because we are looking to gather quantitative data, testing with a more significant number of

11 https://smashed.by/usabilitytesting

users is preferable as this reduces any one user skewing the metric with atypical behavior.

Because facilitated usability testing can be time-consuming, it may be preferable to carry out unfacilitated testing when seeking to establish metrics around critical tasks such as your calls to action. In unfacilitated testing, the user is set a task to complete, and they then finish it without being directly observed or interacted with by a facilitator. Many tools can help with unfacilitated testing of this nature.

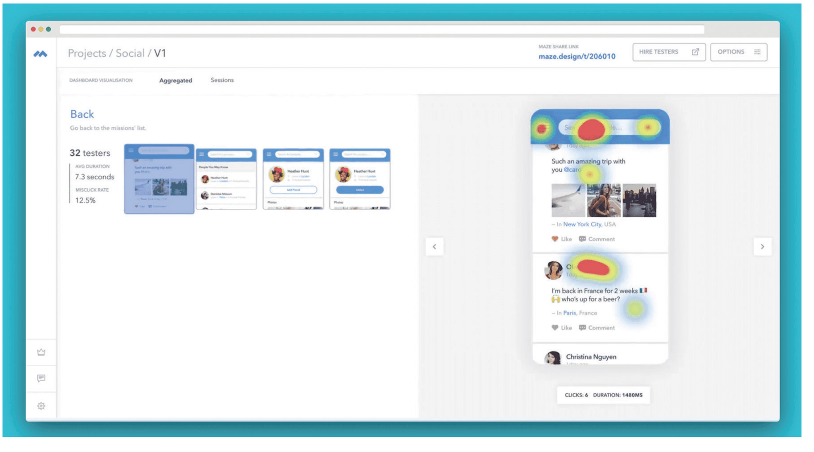


A tool like Lookback allows unfacilitated testing and the ability to watch each session back as a video.

One option is to use an application such as Lookback. Lookback allows you to carry out both facilitated and unfacilitated testing[12] both in person and remotely.

Lookback allows you to send a user a link that, when clicked, will set that user a task and ask them to complete the work while being recorded. The advantage of this approach is that you can see users completing the task in video format along with a commentary of them explaining what they are doing and thinking.

The drawback, however, is that you are left to calculate the metrics by watching each session and recording the number of misclicks or other metrics that are of interest.



Maze provides detailed analytics in regards to what those users did.

One solution to this problem is to use a tool like Maze. Maze doesn't record videos of user sessions or allow you to see the user completing the task. It provides detailed analytics relating to what those users did, makinges it ideal for task metrics. Lookback is better suited to qualitative testing where you can observe individual user behavior, rather than just read data about it.

12 https://smashed.by/unfacilitated

Making Sure Measuring Usability Happens

Using the right tool for the job is of crucial importance if you are to integrate tracking usability metrics into your workflow. If gathering those metrics is not straightforward then you will stop doing it, and that is a dangerous road.

We tend to focus on things we can see. If all we see are conversion numbers, then that's where the organization will focus. The result will be the adoption of short-term techniques to improve conversion (dark patterns) at the cost of long-term success.

If we start tracking usability, we not only ensure it gets the attention it deserves, but also over time we will be able to demonstrate its value. We will be able to show that if we reduce the time it takes to complete a task, there is a direct correlation with improvements in conversion.

The same is true with tracking engagement. By tracking engagement, you can prove its relationship to conversion and the need to invest in improving it.

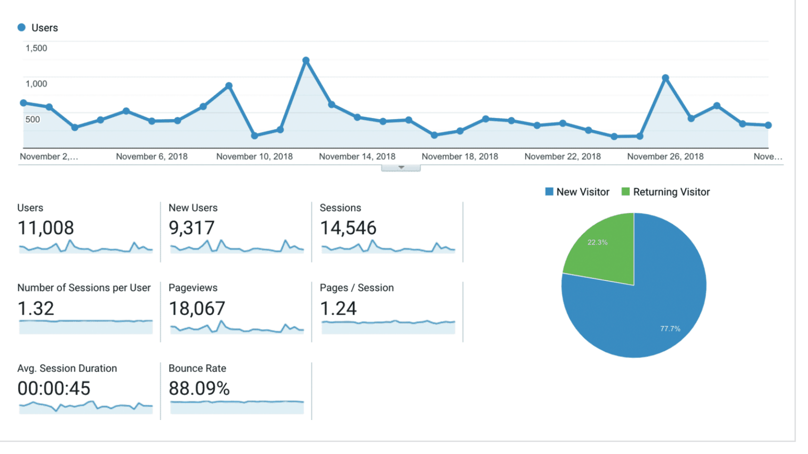
TRACKING ENGAGEMENT

Engagement is a critical component of how likely a user is to take action on a website. The more engaged a user is with your content, the more influenced they are by it, and the more likely they are to act on it. Unfortunately, although tracking engagement makes it relatively easy to get rapid feedback, we cannot always take that data at face value.

The Problem with Measuring Engagement

A common metric organizations measure when seeking to understand engagement is session duration. But taken alone this can prove misleading. Is a long session an indication the user is engaged, or that they have left the browser window open and gone to make a cup of tea?

A low bounce rate can be a sign of good engagement, but equally it could mean a user is wandering around a website lost and confused. Even mentions on social media are not always a sign of positive engagement if those mentions are critical.

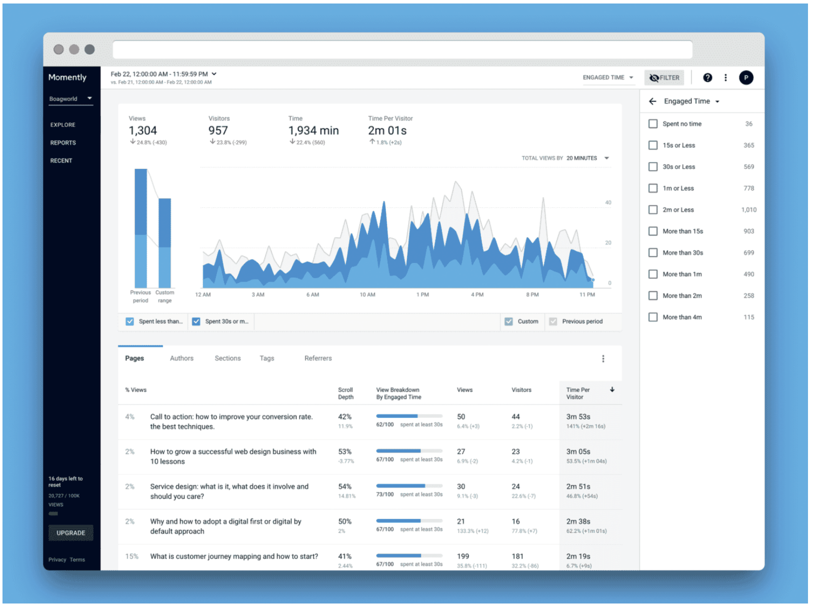


Google Analytics highlights session duration and bounce rate, but that doesn't necessarily tell us much about engagement.

We must view any engagement metric with a critical eye. That does not mean we should give up, however. Indeed, many engagement metrics are definitely worth paying attention to.

Metrics for Measuring Engagement

Let's be realistic. There is no perfect metric, whether you measure conversion, usability, or engagement. But there are many tools in our arsenal we can use to start building up a picture of engagement. Let's look at what is available to us and ask what works best in which circumstances.



Momently allows you to track user attention and not simply page views.

Attention Minutes

One of my favorite metrics for measuring engagement is attention minutes (otherwise known as engaged time). It is similar to session duration, but only counts the time a user is actively engaging with a page.

The page has to be active (not sitting in the background somewhere) and the user has to be doing something on the page within a specified interval. That might be scrolling, clicking, or watching a video.

I rely on a tool called Momently to help me track the user's attention. It enables me to identify my most engaging posts.

Of course, even attention minutes are not perfect. A user could be desperately searching for relevant information, frustrated they cannot find what they want. Although, according to the Nielsen Norman Group, users give up such efforts after about 10 to 20 seconds.[13] So as long as they remain active beyond 20 seconds, you should only capture people who are genuinely engaged.

Unfortunately, not every analytics application can measure engagement using attention minutes. If you can, it is definitely worth installing one that does if you wish to track engagement. That said, be careful: too many tracking scripts can start to degrade site performance, and that will negatively impact both dwell time and conversion rates.

Interactions

If you cannot track attention minutes, in most cases your next best option for measuring engagement is interactions. In the average user session, how many times is the user interacting with the website?

Those interactions may be:

- comments
- downloads
- shares
- clicks
- any other interaction you consider important enough to track

Some of those interactions will be more valuable to you than others, so you might want to give a numerical weighting to certain ones.

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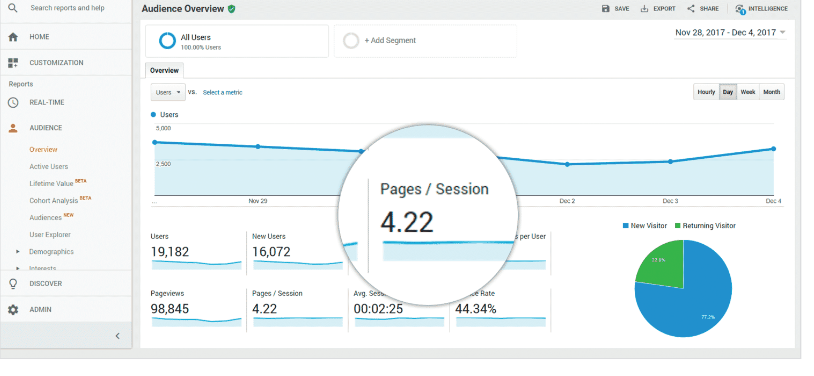
13 https://smashed.by/attention

Next, take this numerical score and divide it by the number of unique visits. That will give you a better indication of how engaging your content is without skewing your data with fluctuations in traffic levels.

Imagine that over your selected period, 50 people download a PDF, 5 people use your contact form, and 80 people leave a comment. Although the number of people submitting contact forms is lower, each one is extremely valuable, so we give it a multiplier of four. That means our 5 contacts are worth 20 points. Our cumulative score across all engagement points is 150. If the website had 1,500 unique visitors over the same period, we would divide 150 by 1,500, giving us an interaction score of 0.1. We can then track how this figure fluctuates as we make changes to the site.

Also interesting is *interaction depth*. On my blog, I can judge engagement by the number of articles a user has looked at in a single session. When users go from one post to the next, it is a good sign they are finding my content engaging.

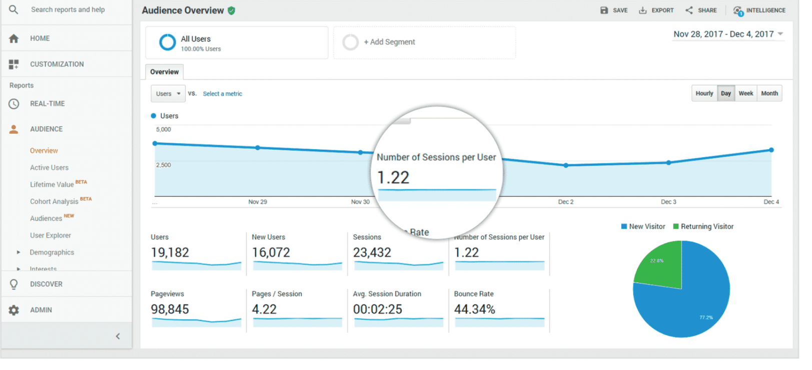


Google Analytics makes it easy to see the number of pages a user views in a session. Depending on your type of site this could be a valuable engagement metric.

Frequency of Visits

One easy metric for measuring engagement is how frequently users return to your website. Visiting often is a good indicator that users find the site worthwhile.

There are a couple of approaches to this metric worth considering. First, you can look at *how many times a user visits the site*; the higher the number is, the better (usually).



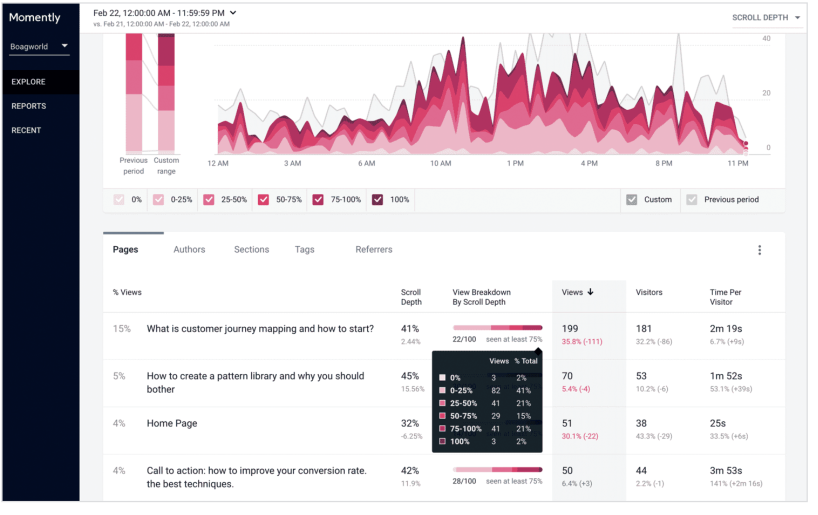
Although Google Analytics makes it easy to see the number of sessions per user over a given period, it is much harder to calculate the number of days between visits.

Second, you can also look at the *average number of days between those visits*. In this case, the relevance of that data will vary. For example, if you are updating the site hourly and yet users are only returning once a month, then there may be a problem. If you update monthly then the user returning just once a month would make perfect sense.

The frequency of visits can be a tricky metric from which to gain real insights. Despite being easy to track, the type of site will heavily influence the data. For example, a high frequency would be desirable for a news website. And if a website was effectively brochureware, it might be perfectly fine if people only visit once or twice; that would be enough for the site to do its job.

Scroll Depth

A better metric for measuring engagement – and one I pay close attention to – is scroll depth. How far down any particular page the user scrolls is a good indication of how useful they consider the page. It tends, therefore, to be more useful in tracking engagement with a particular page rather than the site as a whole, but this makes it helpful for optimizing page design as it helps you place calls to action in the best position.

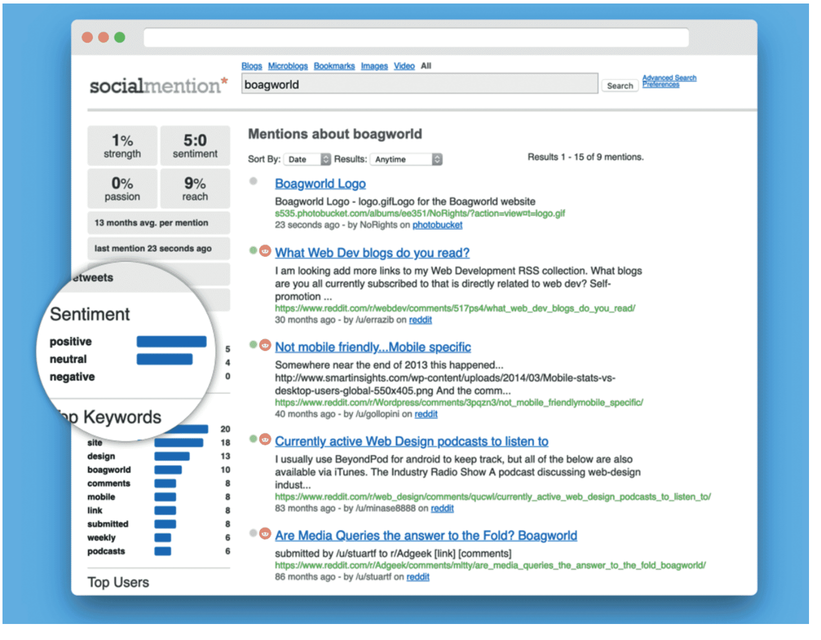


Momently makes it easy to see how much of a page a user is viewing. That is useful for both measuring engagement and working out the optimal positioning of calls to action.

One of the nice things about tracking scroll depth is that there is no shortage of applications that allow you to track it. Its simplicity makes it a convenient indication of engagement. Just recognize that like all metrics it cannot be used in isolation; people might scroll because they cannot quickly spot what they are looking for, or because they want a quick overview of the entire page.

Social Media Shares and Comments

Depending on your type of site and its audience, one of the best metrics for measuring engagement can be user comments and social media shares. That is particularly true if your website serves a role in content marketing.[14] Users are inclined to comment on and share content they perceive as valuable.



Social Mention will not only track the number of mentions on social media but the sentiment too.

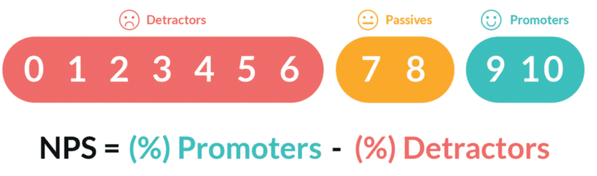
Of course, they also comment on content they dislike as well, so it is essential to track the sentiment of comments or mentions on social media, not just their numbers.

14 https://smashed.by/contentmarketing

The Net Promoter Score

Finally, I could not write about measuring engagement without mentioning the net promoter score. That tried-and-tested surveying technique is ideal for ascertaining how likely somebody is to recommend a company, service, or website to another person using a simple 1–10 rating.

A score of six or below typically indicates that a user is a detractor and views the site negatively. Only a score of nine or ten suggests the user is actively engaged with the website.



The net promoter score is a well-established tool for measuring satisfaction and engagement.

When measuring how engaging a website is it is essential to focus on the site rather than the company in our survey. In other words, we should ask:

> *On a scale of 0–10, how likely is it that you would recommend this website to your friends, family, or business associates?*

Otherwise, we can see results distorted by some other element of the customer's experience with the company beyond the website itself. However, even when asking the question in this way, users tend to be influenced by other factors. They might give a low score to the website because they were disappointed with the company's customer service (which is unrelated to the site), or even because they are in a bad mood that day.

BEWARE MEASURING WITH ANY ONE METRIC

As you can see, no metric is perfect for measuring the overall effectiveness of a website. We need a range of metrics working together in areas such as engagement, conversion and usability to build up a complete picture of a site's performance. Only then can we be confident that the improvements we make to our website have a positive impact.

The exact mix of metrics and the emphasis you put on different components in that mix will vary by website. An e-commerce website will always make conversion a higher priority, using the full range of metrics I outlined relating to that area. By contrast, a content-heavy website will place a much greater emphasis on usability, as the primary task for users on these sites is to find the answers they are seeking. However, that is not to say that such a website would ignore engagement or conversion. It would just be less important.

A brochureware website will likely be smaller and so would emphasize usability less, focusing instead on engagement, but also with an eye on users taking action. Because it would have less data than an e-commerce site, the focus would probably be on a simple conversion metric, like the number of contact forms completed, rather than lifetime value or average order value.

The chances are you won't get the mix right first time, and it will evolve. That is fine, but you cannot proceed without something to measure.

With our metrics in place and a realistic understanding of their role, we can turn our attention to improving them. But how can we start to influence our users' behavior without alienating them? To answer that question, we need to get to know them better.

Get to Know Your Users

CHAPTER

3

CHAPTER 3

Get To Know Your Users

It is so easy for us to think we know our audience when, in reality, we do not.

Relatively early in my career, I ran some usability testing with an elderly audience. I had been working on the design for a while, and I thought I had a pretty good solution. After all, I had designed for this audience before, and although this was the first time testing with older people, I was confident I understood them.

When the first participant arrived, we had an initial chat and, sure enough, she was everything I expected. She was a lovely woman, widowed 15 years ago, who spent most of her day at a local bridge club and used the internet mainly to keep in touch with family on Facebook.

Eventually, it came to testing my design, so we sat down in front of my iMac, and I asked her to complete a simple task to make her feel comfortable.

"I am sorry, dear," she said before she did anything at all. "I don't think I can do that. I use a laptop at home and so have never used a mouse before."

The whole conversation utterly threw me! Who doesn't know how to use a mouse in the 20th century (as it was then)? She must be an anomaly. However, it turned out every single person we tested that day had never used a mouse. Not one of them! It appeared that this generation had skipped the desktop era, being given a laptop as their first computer by a family member. That had an enormous impact on how easy they found my interface to use and yet I was utterly oblivious to the fact.

We need to truly understand our audience, and that means carrying out user research

If we are seeking to create websites that encourage users to take action, we need to know these kinds of things. We need to truly understand our audience, and that means carrying out user research.

User research is an area generally associated with improving user experience. Nevertheless, those of us focused on improving conversion rates need to give it just as much attention. I encounter many marketing and e-commerce teams relying far too heavily on intuition, rather than any real insights.

We all know we should research our audience, but it is shocking how few of us do it regularly. When deadlines are pressing, and budgets are razor-thin, user research is one of the first things to go. Instead, we rely on our assumptions. However, in my 23 years working on the web, I have become increasingly aware of how little I understand about users and how adept they are at surprising me. My assumptions are rarely right.

I know that if I want to encourage users to take action, I have to dig a little deeper into how users think, act and behave. However, as I wrote earlier, I am a pragmatist. I know your company will not spend money on user research without a visible return.

That is why the user research techniques I am going to suggest in this chapter are not best practice. Instead, they are approaches that any company can take with little or no budget and just the smallest amount of time possible. They won't lead to a perfect understanding of your users, but they will enable you to at least show the benefits of user research.

We begin by merely consolidating what your company already knows.

Consolidate What You Know

The chances are that your company already knows a lot about its users. The problem is that this knowledge is spread all across the organization, and there is no complete picture anywhere.

Our first step is clear. We need to consolidate what the company knows in a single place. Where that place is, is up to you, but typically I use a tool like Evernote, Notion, or Google Docs – a place you can give other people easy access to that information.

Where can we look for what the company already knows about users? My first stop is usually the *marketing department*. They have almost certainly carried out some form of user research; research that has often led to the creation of a report or set of personas that ended up in a filing cabinet somewhere. Start by getting your hands on whatever they have, but make sure you ask when it was put together. It may be that it happened some time ago and so now might not be fully accurate.

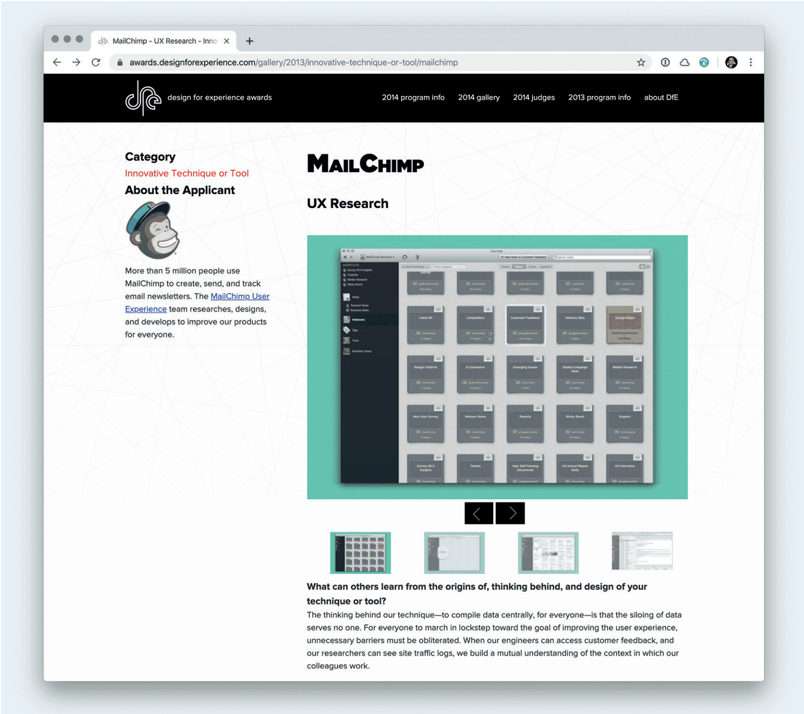
Your next stop should be the *customer support team*. These people speak to customers every day and usually have interesting insights into their challenges and questions. It might be that they keep some record of common queries, but if not, interviewing a few members of the team will often provide valuable information, such as what common problems users contact them about.

After the customer support team, I tend to speak to the *sales team*. Again, they have regular contact with customers and so know who they are and what they are trying to achieve. Sales teams also have the advantage of spending time visiting customers and so will have some benficial impressions about who they are.

Next, it is time for you to *delve into the data*. Analytics can provide valuable information about user concerns. There might be some demographic details, such as location, but what we mainly care about are our users' questions, concerns and objections.

I would encourage you to take a look at what keyword phrases brought users to the site in the first place, and what they typed into your website search box. That will tell you a lot about what they are after. You will also need to pay careful attention to which pages they are visiting on the site as this will give you an indication of their priorities. Cross-reference this with dwell time on those pages to get a sense of just how valuable that content is to them.

Finally, take a look at *social media*. Take time to check out the profiles of those who follow you. You will quickly build up a picture of



For a long time Mailchimp used Evernote to consolidate all they knew about their users.

who these people are and, if you also look at their interactions with your company, what they want.

Take anything you learn and put it into your tool of choice. Don’t worry about organizing it. We will sort through it all later. For now, you are just making sure all that knowledge is in a single location.

Once you have completed that process, it is time to start sorting through what you have. Some information will be horribly out of date; other information will be irrelevant. In short, you will have to sort through rubbish to find the gems. And before you can do that, you need to know what those gems are. What is it about your users you need to understand?

Understand What You Need to Know

In my experience, most of the research into target audiences within organizations has a marketing slant to it. For example, if you look at the average persona, they tend to focus on demographic information and personal tastes.

Personas often focus more on demographics than questions, objections, and tasks.

Don't get me wrong; this is valuable information. To appeal to a person, you need to understand their values and attitudes. But it is not the whole story, especially when it comes to online conversion.

In traditional marketing, much of the work revolves around grabbing people's attention and creating a need. Whether print, TV or radio, it is all about cutting through the noise and making people want what you have to offer. Without a doubt, digital has only added to this noise and choice. However, if a user arrives on your website, they have already given you their attention. It may be just for a few seconds, but by visiting your site, they are at least interested in what you have to offer in principle.

That means we don't need to convince them of the need. What we must do is show people we can meet that need. With that in mind, the information we require to help persuade people is a little different, especially if we want to convince them without resorting to manipulation. In particular, I tend to look at the following areas.

The User's Questions

Most users come to a site to find answers to their questions. Those could be as broad as "Does this company provide the services I need?" to specific questions around how your offering works. If we do not know those questions, the website will not meet their needs and will not persuade them.

The User's Objections

Many of the questions the user has are concerns or objections. They are reasons why they might be hesitant to take action. We need to know these objections so we can address them.

What Influences the User

Users do not decide to act on your website in a vacuum. A range of things from reviews to your competition influence their behavior. User research should uncover these influences so you can address them.

What Interactions the User Has With Your Company

Again, the website doesn't exist in isolation. Users interact with a company in many different ways. They use online channels like social media, as well as offline, such as a call centre. Understanding where the website fits into these interactions is essential.

How the User Is Feeling

State of mind is an aspect of user research often overlooked, and yet it plays a big part in how a user views a website. Our state of mind impacts our cognitive load and the time we are willing to invest in a site. More importantly, it affects our likelihood of acting.

The User's Ultimate Goal

When a user comes to your site, they are trying to achieve something. They have a goal they want to reach. For example, when a user visits a web designer's website, their ultimate goal is to improve their own website. Understanding that goal helps us demonstrate how we can help them achieve it.

The User's Tasks

To achieve their goal, users normally need to complete a series of tasks on your website. That might be buying something, or contacting the company. A good website has to support these tasks, and so we must be clear about what they are.

The Pain Points the User Needs Help Overcoming

Often the user's goal is to address a problem. This pain point has driven them to look for a solution, and they want to know whether your company can provide it.

As you look through the information on users you have collated, you will discover that you have much of what you need already. However, there will be gaps.

Only yesterday, I was on a call discussing how I could help map the customer journey for a potential client. They made it clear that they had done all of the necessary research; they just needed my help collating that research and turning it into a visualization of the journey. When I asked about the research they had done, it turned out that they had spent a lot of money on some impressive data analysis based on their audience's online behavior. They could tell me all kinds of facts about their audience, their preferences and buying habits.

	Discover	Research	Purchase	Delivery	Post-Sales
Task					
Questions					
Touchpoints					
Emotions					
Influences					
Weaknesses					

A basic customer journey map can be a useful tool in understanding what gaps you have in your user research.

Although this was all valuable information, it didn't prove particularly helpful when mapping most aspects of the customer journey. It gave me no insights into how the user was feeling, what questions they had, what tasks they needed to complete, or what pain points they were trying to overcome.

Fortunately, as I have already said, filling in any gaps in your knowledge doesn't need to be time-consuming or expensive.

Carry Out Some Lightweight User Research

User research professionals employ many different research techniques, from user diaries to focus groups. Right now, however, I want to focus on just two: surveys and interviews. These two techniques are both handy for uncovering the kinds of information we require and are inexpensive to run. We begin with surveys.

RUN SOME SURVEYS

I know that surveys are hardly new in terms of user research. But when it comes to using them effectively, the devil is in the details.

Surveys often turn into bloated monsters that grow bigger and bigger, one unfocused question at a time. Then people are shocked when the response rate is low. What is more, the questions most organizations ask in their surveys are not always the most fruitful for increasing conversion. If we are trying to improve conversion, we need focused surveys that help us understand one simple thing: why people are not acting.

With that in mind, here is a radical suggestion: let's ask them!

I have based this book on an online course I run. The course has a landing page designed to encourage people to enrol and – unsurprisingly – I wanted to optimize it to ensure it was doing its job.

A simple one-question survey can prove invaluable in understanding user behavior.

As part of this process, I wanted to know why some people chose not to enrol, so I asked them. I ran a simple survey when people went to exit the site without buying that asked a single question:

If you decided not to act today, could you let us know why?

I then presented a series of multiple-choice answers based on previous research. I also offered an “Other” option in case none of the options fit.

There are several reasons why I like this approach. First, it is short! When you limit the survey to a single question, your response rate skyrockets. You also avoid overwhelming yourself with lots of answers to many different questions. Yes, I could have asked other questions, such as their age or job. But I knew additional questions would reduce the response rate and probably wouldn’t influence how I attempted to improve the page in the short term. Never collect information simply because it might prove useful. Only ask a question if you know exactly how you are going to make use of the answers.

Then there was the fact that the question is multiple-choice, which helps to avoid data overload. If you ask questions that allow the user to type whatever they want, you have to spend hours looking at the responses afterwards to identify trends. By restricting things to multiple-choice answers, you can see patterns at a glance. Not only that, but a multiple-choice question requires less thought from the user and so also improves your response rate.

Not that there is anything wrong with open questions – if you have time to analyze the results. It is just that often we don’t have that time, and any benefit from the survey is lost.

Another thing I like about this simple survey is that it is laser-focused on precisely what we want to know. Too many businesses create surveys with no clear picture as to how they are going to use the answers. By asking such a direct question, it is obvious how to take the answer and apply it to make improvements. If you ask broader questions about somebody's preferences, the implementation of that knowledge is not as obvious.

Notice how the survey doesn't ask for any personal details. People don't like sharing information about themselves and if you do ask, then expect far fewer people to respond. People are reluctant enough without making it look like a covert attempt to get personal data for marketing purposes. One way to reassure people about your motives is to explain why you are running the survey. Keep it short, but a sentence or two describing how the survey results will will go a long way.

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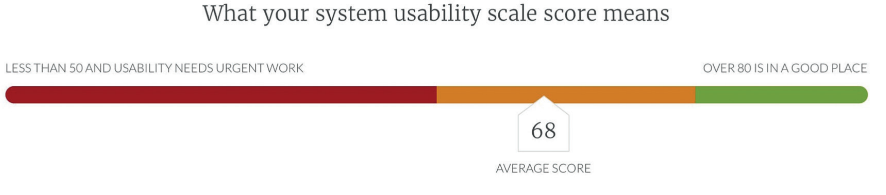
Finally, if the response rate is low, you might consider offering an incentive. Although that could be a material or monetary reward, it doesn't have to be if budgets are tight. A digital download is often a good incentive because you can offer it at no additional cost to everybody who completes the survey. Another alternative is entry into a prize draw – anything to thank people for the time they are taking to complete the survey.

Although my one-question survey provides valuable and focused insights, it is not your only option. You can run a survey answering any question, or even run one consisting of multiple questions. If you do run a survey with several questions, remember that the more you add, the lower the completion rate. Make sure you only ask questions whose answers you are sure how you'll use.

Surveys can cover a range of subjects:

- the profile of people visiting your website
- what brought people to the site
- what questions they hope the site will answer
- how easy they found the site to use

That last one is particularly interesting in my experience, as people often fail to act because they are struggling to use a site. One option would be to consider running a survey like the system usability scale we covered in chapter 2 on measuring conversion.



The system usability scale can be used to benchmark your website against others.

So far, our focus has been on running surveys on your existing website. You can also send out surveys via email or using social media channels. That has its pros and cons. On the upside, using your email list and social channels means you don't interrupt users on your website, which can potentially reduce conversion. You can mitigate against this by only showing surveys when a user goes to leave the website (often known as exit intent surveys). However, this will reduce the number of people completing the survey, and so it is a trade-off.

The problem with email and social media surveys is that respondents are existing customers or warm leads. That makes it harder to run surveys like, “Why didn’t you act today?” because many of those people will have acted already! However, there is value in surveying existing customers. One question I like to ask is, “What was the one thing that nearly stopped you buying?” After all, if it nearly stopped them, then it is probably stopping other people.

As you can see, surveys are a powerful way of gaining insights into barriers to conversion. But surveys are not enough without the support of user interviews.

CARRY OUT USER INTERVIEWS

Let’s take a moment to pause and talk about my favourite subject – myself! I want to share with you six facts about me:

- I am 47 years old.
- I have been married to my gorgeous wife for 21 years.
- I have a 17-year-old son.
- I have worked in digital for 23 years.
- I founded a digital agency and ran it for 13 years.
- I work now as an independent consultant.

Now you know these facts, do you feel you know me as a person? Of course not! Even if the list were twice as long – ten times as long! – you wouldn’t know me. You could read this entire book or my 14 years’ worth of blog posts and still not know me. It is hard to know somebody if you do not interact with them. Reading facts is not the same as lived experience, and that is why you need to meet with your audience in person. Only if you spend time with people can you understand them; and only once you understand them can you seek to encourage them to act. Running a survey is not enough.

I would further suggest that neither is reading a report. Too many organizations rely on third-party user research agencies. Although that has its benefits, there is no excuse to avoid meeting users yourself.

The UK's Government Digital Service values user research so highly it insists that project stakeholders must have at least two hours of contact with users within the last six weeks to participate.

The UK Government Digital Service encourages regular user contact.

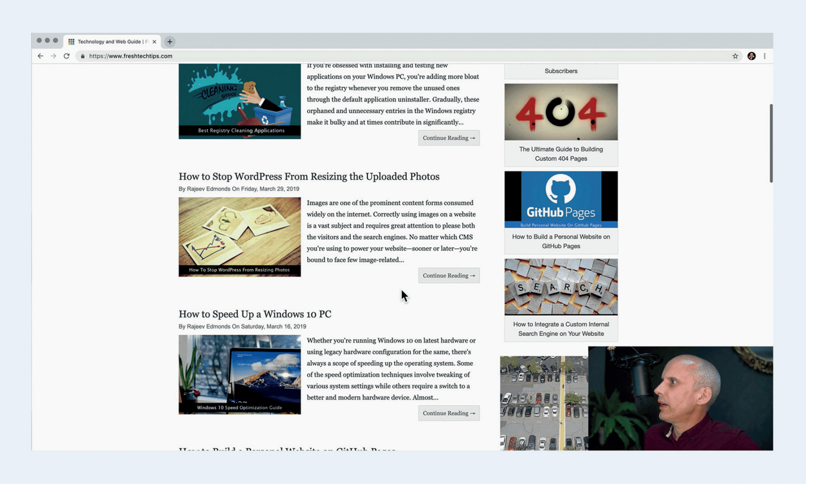
So how should you start? Well, although it will take a little more effort, I would recommend visiting your audience in their place of work or at their home. I can tell you from personal experience: this kind of interview is transformative.

The first time I did this, I was working on an e-commerce website. The client insisted I spent some time with their audience personally, but I admit I was sceptical, thinking that I had carried out more than enough research. I turned up at the home of my first participant at the agreed time and rang the doorbell. When she answered the door, two cats immediately took the opportunity to leave the premises, with one rubbing against my leg on the way out.

I have to confess that on meeting this lovely woman and entering her home, my mind immediately went to Eleanor Abernathy, the crazy cat lady from the Simpsons. It turned out my interviewee had nine cats in total. Every surface of her house was covered in cat memorabilia. As soon as I sat down on her couch, a cat jumped on to my lap, demanding to be stroked.

After chatting for a while, I suggested we try testing the e-commerce site to see how she found it. She took me into her study and sat down in front of the oldest desktop PC I had ever seen, that sat atop a desk cluttered with cat keepsakes. Her desk was so covered with cat souvenirs that she barely had room for her mouse (awkwardly appropriate), which she repeatedly had to pick up and move to give herself more space. And the moment she sat down, a cat leapt onto her lap demanding attention. In fact, it so craved attention that part way through the test, it decided to climb on the keyboard to stop her typing.

I learned two valuable lessons in that session.



A tool like Zoom or Skype will allow you to see the person and their screen during interviews.

First, we look at our websites, and they seem simple and easy for us; but in the real world, people are distracted and in less than optimal conditions. We cannot assume we have people's full attention. Second, not everybody has access to the latest technology with the most up-to-date software. My interviewee's computer was so slow and its desktop so unorganized that even getting to the website we were testing proved arduous.

I would never have learned those lessons from a survey or a report, or even speaking to her over the phone or at my office. It was only visiting her home that meant I saw the real person behind the personas and research. What is more, she was the first of six people that day, each one more eye-opening than the last. I learned more in that one day than I had in all the previous research we had carried out. Yes, home visits like this are time-consuming, but they are completely worth it. Even if you can only do it once, I encourage you to do so. I spent one day of my time, and it transformed my approach to the project.

You will probably feel the need to speak to more than six people. You may believe that this isn't representative and that you should talk to more. After all, six people will not represent your entire audience, and speaking to six people over a single day will not give you a rounded picture. But it is a start, and it can be supplemented by surveys.

You can also ask users to come to you. That saves a lot of time visiting people. However, it will also put a lot of people off participating, especially if you are trying to reach busy people, and to be honest, most of us are these days. Whether you want to increase your sample size or simply reach people whom you cannot meet in person for whatever reason, a remote interview is a worthwhile alternative.

A simple phone call is a perfectly valid way of carrying out a remote interview. Personally, I favor videoconferencing using something like Skype or Zoom.

Although sometimes a little unreliable compared with the phone, videoconferencing does offer two distinct advantages. First, you can share screens, allowing you to look at things together. Second (and in my opinion even more importantly), you can see the other person.

It is amazing how often facial expressions provide as many insights into the user and their thought process than what they actually say. There are specialist user research videoconferencing tools, like Lookback, but being designed for usability testing, they are overkill for a simple interview. They are more designed for usability testing.

It is amazing how often facial expressions provide as many insights into the user and their thought process than what they actually say.

Whether you intend to carry out your user research in person or remotely, I highly recommend that you carry out these interviews on a one-to-one basis, rather than running group sessions. Although focus groups have been popular for many years, they do come with some significant flaws that could lead you to false conclusions. In focus groups, you tend to find that more extrovert characters dominate the conversation and carry the rest of the group with them. As a result, it is easy to come away from a session thinking that the extroverts' opinion is shared by the majority. One-to-one interviews may take longer, but they will give you much more fruitful insights into your audience.

Whatever approach you adopt, the key to success is going into these interviews with a clear picture of what it is that you wish to learn. What that is exactly will depend on your context. A good starting point is to focus on the customer's journey.

I would encourage you to talk with participants about their experience of engaging with your company.

- What problem or goal brought them to your company in the first place?
- How did they initially come across your company?
- What were their impressions of your company?
- What did they do next?
- What questions did they have and how did they get them answered?
- What other steps were involved in their engagement with your business?
- How did they feel about the process?

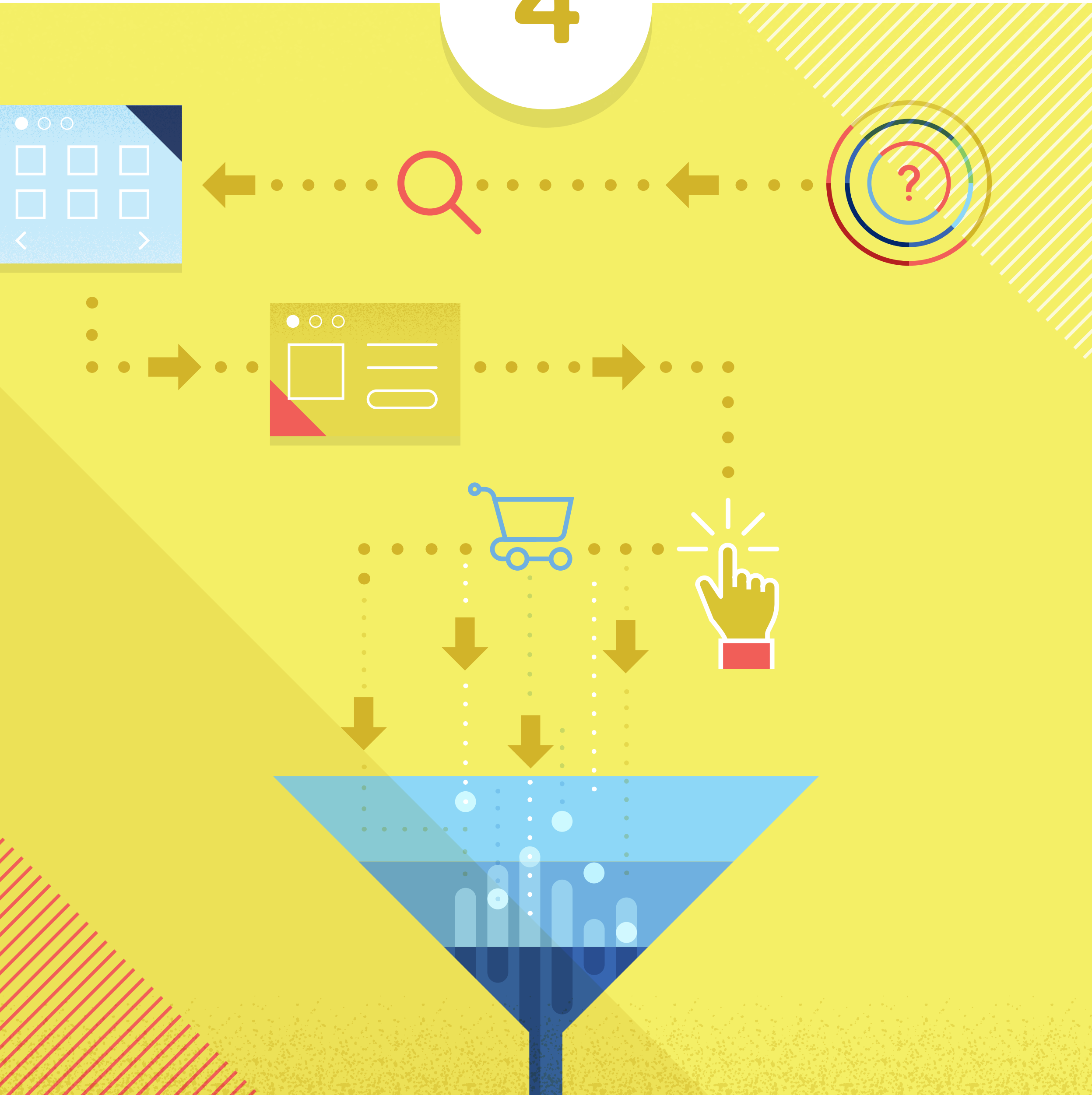
Discussing their journey is a good starting point for two reasons. First, it focuses on their experience and not their opinions. It is common for people to say one thing and do another, so concentrating on their journey means they are recounting their story, not getting drawn into a subjective discussion.

Second, and more importantly, understanding their journey is crucial for improving conversion, as we discuss in the next chapter.

Build a User-Centric Sales Funnel

CHAPTER

4



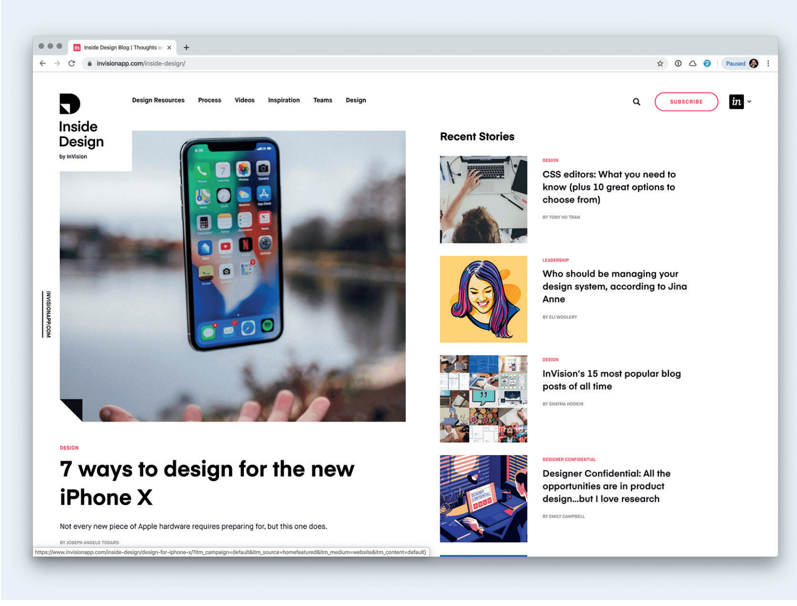
CHAPTER 4

Build a User-Centric Sales Funnel

Like most designers, I spend a lot of time creating wireframes and prototypes. These days we are spoilt for choice in terms of tools to help us do that. I use a tool called InVision. But I didn't just wake up one morning, see InVision and then buy it. There were many steps involved.

One of the biggest misunderstandings about conversion optimization is the idea that a conversion is a singular event. People are often under the impression that there is a magical moment when users take action and conversion happens. In truth, the conversion is a series of smaller actions that lead users towards a final purchase. My experience with InVision is a perfect example of this.

My journey began when a fellow designer shared a post from the InVision blog. InVision regularly posts content of value aimed at its target audience. My first action was simply to click on that link and read the post.

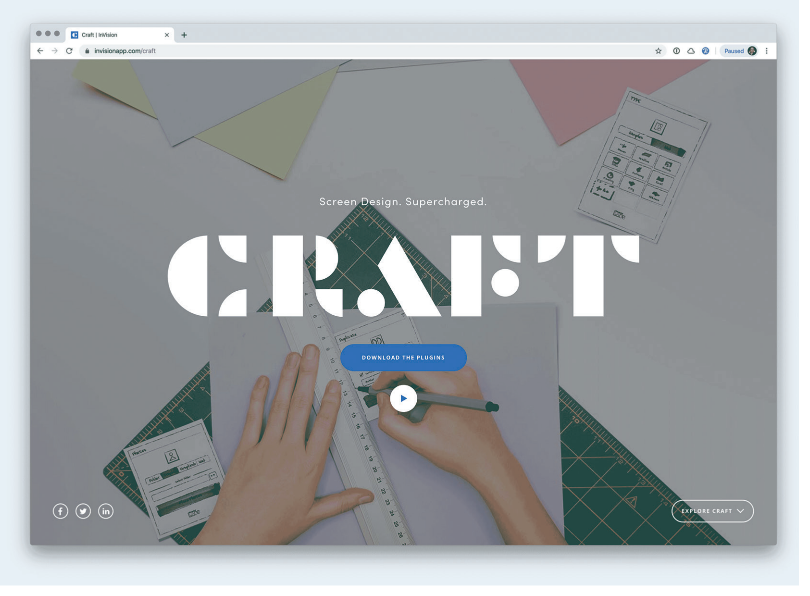


InVision has built a sales funnel around providing value to its audience, often free of charge.

I didn't progress any further on that first visit, but later somebody else shared another InVision blog post and this time I decided to sign up to its newsletter. That was my second action.

Most of the time I was too busy to read the emails InVision sent me, despite them containing more valuable content. However, one email caught my eye because it included a link to a wire-frame template that worked with Sketch (my graphics package of choice). This would save me considerable time, so I was quick to download it, completing another action that continued my engagement with InVision.

By this stage, I was seriously impressed by InVision and actively interested in what it had to offer. I was aware of its main product at this point, but I was still reluctant to commit to yet another monthly fee. I spotted Invision's free plugin for Sketch (called *Craft*) that added some much needed missing functionality. Another step on my journey: I downloaded it.



InVision inserted itself into my daily life with the Craft plugin. Suddenly InVision was an essential part of my workflow.

I hadn't used the plugin for long before I needed to show a client a prototype I was designing. I noticed the plugin allowed me to upload my prototype straight to InVision from within Sketch. I took my next step there and then, opening a free account and uploading my prototype to InVision.

I quickly became hooked and found that InVision became a part of my design workflow. When I started to hit the limitations of the free account with InVision, the next step was to sign up for a paid account. It was the most natural and obvious action. I have never looked back.

Note all the smaller actions I took that led me to become a loyal customer of InVision:

1. Reading multiple blog posts.
2. Signing up for the newsletter.
3. Downloading the free wireframe template.
4. Installing the Craft plugin.
5. Opening a free account.
6. Starting to pay a monthly fee.

Like many people, I suffer from subscription fatigue. It seems like every piece of software wants to extract a monthly fee, and it has led me to resist. How did InVision overcome that resistance, so that by today I must have paid thousands of dollars for its service?

The answer lies in the *sales funnel*, a tried-and-tested approach used in sales and marketing for years. The premise of a sales funnel is straightforward. Instead of asking people to make a substantial commitment on day one, you suggest progressively larger commitments over time. Eventually that culminates in the "big ask." In other words, a sales funnel takes the user on a journey, one no-brainer decision at a time.

None of the steps towards a monthly subscription with InVision felt painful. They felt like the obvious thing to do because each step provided me with tangible value. InVision took the time to understand my needs (such as missing functionality within Sketch) and offer a compelling benefit that built trust. As I learned to trust that InVision would always offer me genuine value, it started to gently and gradually insert itself into my working practices. I came to rely on InVision, to the point where paying for the service was the obvious next step.

That works in part because of commitment bias: once we have committed to a product or service, we tend to stick with it and defend our choice to others. In my experience, that bias seems to be particularly common in tech, where you see designers and developers passionately arguing over the virtues of one platform compared with another.

There is also another interesting thing to notice about sales funnels. They make a compelling case to avoid dark patterns. To demonstrate this point, let's look at an example that is a striking contrast to InVision's approach.

It begins with a confession: I am not good at buying gifts. I hate coming up with presents, and I regularly make terrible choices. One such time was when I considered buying a subscription to Good Housekeeping magazine for my mum. Yes, I know. It's a terrible gift idea, but I was desperate.

I was searching for present ideas and came across a post suggesting some things I might consider. It turns out the article was on the Good Housekeeping website, and unsurprisingly it suggested a subscription to the magazine.

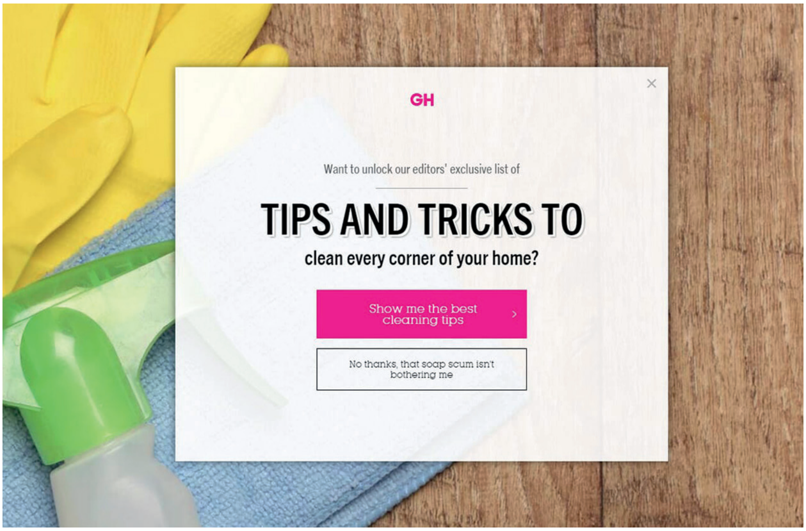
So, already we have the beginning of a sales funnel.

1. I recognized a need to buy a present.

2. I started to research my options.

3. I identified a possible gift.

Unfortunately, that is where things went wrong. I didn't even get as far as visiting the subscription page, let alone subscribing. The problem was that within seconds of viewing the article, a pop-up overlay appeared trying to persuade me to sign up for their newsletter.



Good Housekeeping alienated me as a user and stopped me progressing down its sales funnel.

The call to action offered me two options:

1. Show me the best cleaning tips.

2. No thanks, that soap scum isn't bothering me.

They tried to shame me into signing up to their newsletter. That one action completely undermined any trust Good Housekeeping had built by providing me free advice and alienated me. I didn't sign up to the newsletter, and I certainly didn't subscribe to the magazine. Their entire sales funnel fell apart, because of one bad link in the chain. That said, my mum had a narrow escape! Dark patterns alienate users and discourage them from progressing on their journey. By eroding trust, you undermine the sales funnel, which ultimately damages conversion.

Now you can see why a sales funnel is of value in conversion and how easy it is to break. The question then becomes: how do we create a sales funnel that is robust and valuable? Fortunately, this is where best practice from user experience design comes to the rescue.

Map Your Customer Journey

Customer journey mapping has grown significantly in popularity among UX designers over recent years – and understandably so. No user interaction happens in isolation. They are parts of a broader journey the user goes on. By understanding that journey, you can optimize each point of interaction to ensure it meets the needs of users.

However, from a conversion rate optimization perspective, customer journey mapping provides another benefit too. It helps you develop a customer-centric sales funnel. A sales funnel built around delivering value to the customer, rather than forcing them down a fictional sales pipeline.

This is the difference between InVision, who took the time to understand how they could provide value for me while still moving me towards subscribing; and Good Housekeeping, who attempted to force me to complete the next step of signing up to their newsletter.

How do we create a customer journey map that can inform our sales funnel? To answer that, we need to define what a customer journey map is – and what it is not.

WHAT IS A CUSTOMER JOURNEY MAP?

I see a lot of people get themselves into a mess when they try to map the customer journey. They try to make it an accurate representation of the user experience. Unfortunately, that is not possible. The real world is messy, and no two users' experiences will be the same. Also, those journeys are rarely linear, with people moving back and forth between different kinds of interactions.

Take my clients. Like you, they might start reading this book after seeing it on my site. But that doesn't guarantee they will neatly progress to the next step of hiring me. They may well return to my website and read other posts, sign up for my newsletter, and then be inspired to investigate yet more of my content. That might go on for some time before they switch to the podcast. Real life is messy!

A better way to think of a customer journey map is like a persona. It represents a typical experience for a fictional customer. However, a customer journey map is different from a persona in three ways.

First, a customer journey map tends to focus on different characteristics of the user. While personas often focus on demographics, a customer journey map covers things like:

- tasks
- state of mind
- questions
- influencing factors
- points of interaction

Unlike a customer journey map, a persona doesn't show how the user's experience changes over time.

Second, a persona is a snapshot in time of the user's experience, while a customer journey map represents the changing state of the customer over time.

Take booking a holiday online. A typical journey might consist of the following steps:

1. Decide to go on holiday.
2. Research possible options.
3. Make a final decision.
4. Book the holiday.
5. Go on holiday.
6. Return from the holiday.

The user experience is not consistent across that entire journey. For example, how a user feels when booking a holiday is very different when they're on vacation. Booking a holiday can carry a great deal of anxiety with it, while the holiday itself will be, we hope, an enjoyable experience.

Equally, the questions a person asks will vary depending on where they are in the experience. When booking a hotel, they might ask questions such as:

1. Does it have a swimming pool?
2. Are there activities for the kids?
3. How far is it from the beach?
4. What are the rooms like?

By contrast, when they are at the hotel, they may ask:

1. Where is the swimming pool?
2. What time do the kids' activities start?
3. How do I get to the beach?
4. Can I get a room that is not above the bar?

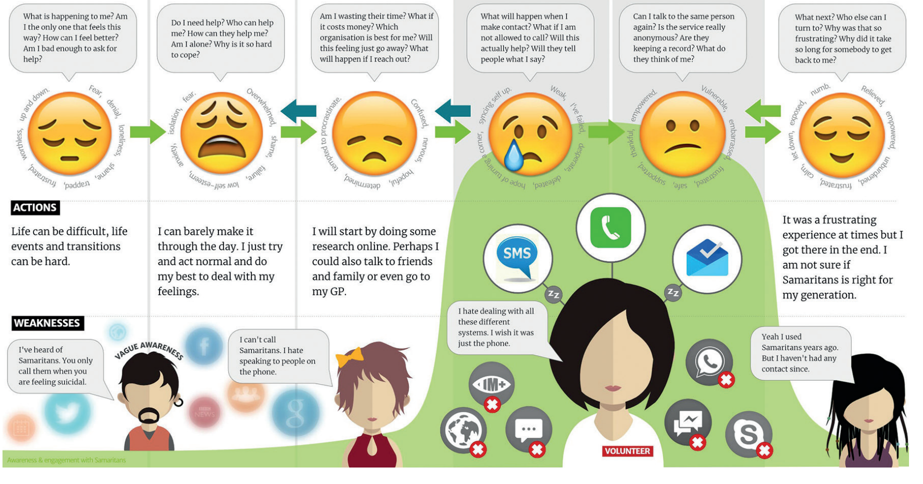
Finally, a customer journey has the potential to explore weaknesses in the experience, where the company in question is letting down the customer.

For instance, a while back, I worked with Samaritans, a British mental health charity that people in crisis can contact. When we mapped the customer journey, we discovered that the charity was failing those who didn't want to use the phone. They had slow response times over text and email. They were also entirely unable to offer people channels such as the web, social media or WhatsApp.

A customer journey takes more effort to create than a persona. As a result, you will produce fewer of them. Often people only create a journey for each of the primary audiences. They also focus on an overview of the entire journey, rather than digging into too much detail. That said, over time you can flesh out the journeys. You can look at segments in more detail or even address secondary audiences.

Another way to think of a customer journey map is like a story designed to provide insights into the customer's journey. It is an archetype that represents the underlying complexity of the real experience but in a more digestible form. In other words, a customer journey map is not going to be 100% accurate.

That might leave you wondering what the point is. Why bother with a map that is not entirely representative of the experience?



A customer journey map can help identify weaknesses in the user experience.

WHY CUSTOMER JOURNEY MAPPING IS ESSENTIAL

A customer journey map is a powerful tool.

If you are a designer, it will help you understand users' context. You will gain a clear picture of where the user has come from and what they are trying to achieve.

If you write copy, it will help you understand what questions users have and how they are feeling.

It gives managers and marketers an overview of the customer's experience. They will see how customers move through the sales funnel. That will help them identify opportunities to enhance the experience, as well as identify calls to action at each step.

For the user experience designer, a customer journey map helps identify gaps, points in the customer experience that are disjointed or painful. These might be gaps between:

- devices, when a user moves from one device to another
- departments, where the user might get frustrated
- channels (for example, where the experience of going from social media to the website could be better)

Most of all, a customer journey map puts the user front and center in the organization's thinking, if it is used in the right way. I tend to ensure that staff are exposed to the customer journey maps I produce as much as possible. I do this by:

- turning them into screensavers that appear on all employee's computers
- making them into mouse mats given to staff

- displaying them as posters in the office
- including them in any meeting documentation

With a bit of imagination, it is possible to ensure that project stakeholders cannot escape thinking about the customer!

That is important because it is easy for a stakeholder to focus on their personal priorities. It is so easy to get caught up in what you want a project to achieve that you forget to consider how it will benefit users. It is also an ongoing reminder throughout the project to consider the user's context. The user's questions, state of mind and goals will change throughout their journey. We need to be aware of that.

A customer journey map also provides context for the project as a whole. A journey map helps define where in the customer's experience the project sits. A typical website might only act as a marketing tool. It creates desire in the user for the product and answers fundamental questions, but the action of buying might happen offline. However, the same website might enable the user to place an order and even get after-sales support.

If you know how much of the journey the project covers, it will help define the scope and the appropriate calls to action. So if we know that the actual sale happens offline, then we understand that the role of the website is to inspire people to make contact with the company. We don't have to answer every objection the user has, just enough to encourage them to reach out. The offline sales team will do the rest.

By contrast, if the sale happens online, we need to address every objection that might be preventing people from buying. The goal here is to make it so users never need to contact the company.

Finally, customer journey mapping can be a helpful tool in broader digital transformation because, at its heart, digital transformation is about adapting to changing consumer expectations. Earlier, I talked about Samaritans and how their customer journey mapping identified a problem in how they dealt with people in need of their help. By mapping the customer journey, we uncovered a change in consumer behavior. Increasingly, people didn't want to contact the charity by phone; they wanted to use digital channels. That helped define a program of organizational change to address this difference in people's behavior. Customer journey mapping helps to expose these changes in customer behavior. It ensures organizations don't base planning on assumptions.

With the importance of customer journey mapping established, let us look at how exactly you should go about creating one.

HOW TO CREATE A CUSTOMER JOURNEY MAP

You can set up the basics of a customer journey map in a three- to four-hour workshop, once you have all the user research we talked about in chapter 3 in place.

You can either run the workshop with customers or, if that is too difficult to arrange, internal stakeholders who have in-depth knowledge about the user. These are mostly the same people I mentioned in chapter 3.

But be careful. If you don't have customers in the workshop, it will be essential to test anything produced to ensure it is accurate. That can be as simple as showing the results of the session to customers and asking their thoughts.

Once you have everybody together in a room, you need to start by establishing the steps involved in the user's journey. What these are will depend on what you sell. However, try to limit the number of steps to about five.

ESTABLISH THE STAGES OF THE JOURNEY

There are two reasons for this limitation. First, the more steps you have, the longer the workshop is going to take to run. More importantly, the more steps you add, the more complex the journey will be, and the final journey map will be too confusing – people will ignore it. The aim is to create a simple, compelling story you can refer to when making decisions, writing copy, and creating calls to action.

You now have a decision to make: you can either map the entire journey at a relatively superficial level, or set out part of the experience in more detail. Which approach you adopt depends on how you intend to use the map. When using the map to inform a specific project (like a website), focus it on that and, maybe, the steps immediately before and after that interaction. However, if you are looking to create an entire sales funnel, then your customer journey map should cover the whole user experience.

To give you a sense of what a top-level set of steps might include, let's imagine the process of buying a new camera from Amazon.

1. **Recognizing a need.** You decide you want a new camera, or maybe your existing camera gets broken.

2. **Researching your options.** You investigate different cameras you might want to buy and various retailers who sell cameras.

3. **Place an order.** After narrowing down your options, you place an order on Amazon.

4. **Receiving your goods.** You track your delivery online and receive various confirmation emails from Amazon.

5. **After-sales support.** You might have a problem with your camera and need to contact Amazon, or you may decide to return the item.

Notice how the journey map doesn't stop at the point of conversion (placing an order). That is important, even if you are thinking in terms of building your sales funnel. We want to develop a sustainable conversion strategy.

That means we need to ensure our customers have a pleasant experience even after making a purchase. If we don't, we will not receive repeat orders. Repeat orders are incredibly valuable as they often come with a low cost of sale.

By comparison, winning new customers is always an expensive business. According to Alan E. Webber of Forrester Research,[15] acquiring a new customer costs five times more than retaining a current one.

There is no magic process for establishing your steps. You could try splitting people into groups to brainstorm steps or decide through discussion. Whatever your approach, don't overthink it. If there is disagreement, consider voting to break the stalemate. Momentum is important. You can always revise your stages later.Once you have your steps, we need to start unpacking what happens at each of those stages.

Whatever your approach, don't overthink it. If there is disagreement, consider voting to break the stalemate. Momentum is important. You can always revise your stages later.

15 https://smashed.by/acquire

REVIEW EACH STAGE

For each step on the journey, you are going to catalogue certain information about the user. These elements are mostly the same information we talked about gathering in chapter 3:

- what questions the user has at that point in their journey
- any objections preventing them from progressing
- any tasks they need to complete at that point
- any people, organizations or sites that may be influencing their thinking
- how they are feeling at that point in the journey
- any points of interaction they have with the company

In essence, you end up with a grid. The steps run horizontally across the table as columns. The categories listed above then run down the side as rows. I find it best to draw this grid on a massive sheet of paper covering one wall of the workshop room.

	Discover	Research	Purchase	Delivery	Post-Sales
Task					
Questions					
Touchpoints					
Emotions					
Influences					
Weaknesses					

A customer journey map is made up of a series of steps with information on the user associated with each step.

Now it is merely a matter of filling in the boxes. For example, what questions do users have when they are researching products?

Of course, this is easier said than done. Attendees will have to empathize with the customer, which some will struggle to do. That is why having users in the room is so helpful. Failing that, however, make sure you have lots of data to fall back on and people who interact with the customer regularly.

Write ideas on Post-it notes and stick them in the appropriate box on the wall. I recommend using sticky notes as it makes it straightforward to move elements from one box to another. For instance, in discussions it is not unusual to conclude a question should be addressed later or earlier in the journey.

I often find it speeds things up considerably if you break the workshop down into smaller groups, and each group takes one of the stages to review. If you adopt this approach, make sure you spend some time near the end critiquing each other's work.

You will find that you generate a considerable number of questions, tasks, and so on for each stage. It is impossible to include all of these on the final map without completely overwhelming anybody trying to understand it. To address this problem, and also allow the groups to validate each other's work, I recommend you end the workshop with a validation and voting exercise.

Encourage participants to look at each box in the grid and check there isn't anything missing. If there is, add a new sticky note. At the same time, they can vote for the elements in the box that they consider the most important to users by adding a mark next to each item they consider particularly important. Each person gets three votes per box. They can either spend all three votes on a single Post-it, because they consider it very important, or spread those votes across several elements.

After the workshop, take the wall grid and boil it down into an infographic that everybody can easily refer to throughout projects and planning sessions. I recommend getting a designer to do this for you, as condensing the data in an easy to read way is quite tricky.

Once you have your finished customer journey map, we can use it in all kinds of ways. However, for this book, we use it as the basis for our sales funnel.

Build a Sales Funnel Around the Journey

Before we look at how a customer journey map feeds into a sales funnel, it is worth taking a step back. One thing a customer journey map does not cover is overall goals and pain points; in other words, what the user is trying to achieve and how they are hoping your organization can help.

The reason a customer journey map doesn't usually show this is because these two areas don't change. The user's ultimate goal and the pain points they are hoping you will alleviate are the same wherever the user is on their journey. For a sales funnel, though, being clear on what these are is crucial to success.

By now, you should have a clear idea about these two areas from doing your initial research as covered in chapter 3.If not, I encourage you to revisit your research phase before proceeding. Do not try and design a sales funnel unless you are confident about what the user is trying to achieve.

A word of warning here, too. Often the ultimate goal or pain point is not as apparent as it might first appear. For example, a B2B customer might tell you that their goal is to improve some business metric. That may be true to an extent, but it is probably not the whole story. Chances are there is an underlying personal motivation such as securing a promotion, getting a pay rise, or a fear of being fired. It is always worth seeking out these selfish motivations because they can be a significant influence on the decision to act, even when making a business decision.

For now, let us presume you feel confident about understanding the goals and pain points. How does the customer journey map help us establish a sales funnel? That begins by looking at those stages and the points of interaction (also known as touchpoints) within each step.

IDENTIFY YOUR TOUCHPOINTS

Your first job is to identify each of the touchpoints that appear in your customer journey map. Where do those touchpoints fit into the journey? Do they support the initial interactions with the customer, or is their role later in the user experience? That will help you understand their role. For instance, if they are involved early in the experience, then their purpose is more likely to affect engaging prospects. If they come later, their role might be support or closing the deal.

There are two points to note here. First, not all touchpoints are digital. We also want to include other interactions, including the likes of in-store visits, sales meetings, or phone calls. Second, one point of interaction might play a role at multiple stages of the journey. A company's website is one of the best examples of this. It can be a marketing tool, e-commerce store and provide customer support. It can even be the product itself.

You can visualize this in any way that makes sense to you. I tend to display the stages in columns, just like in the customer journey map, with each point of interaction spanning whichever columns it supports.

If a channel supports multiple stages in the customer journey, this can be shown on your journey map.

Once you have done that, consider what calls to action each stage of the journey should have.

DECIDE ON APPROPRIATE CALLS TO ACTION

Remember that we aim to develop a series of smaller calls to action. These are actions designed to move the user towards the point of purchase, opportunities for us to prove we are to be trusted when a more significant commitment is required.

These smaller calls to action are also an opportunity to build engagement with your users and establish a relationship. Even getting a user to share your content with others is the beginning of a connection. It says that the user values what you put out into the world.

There is a nearly infinite number of calls to action you might want to consider for each step of the journey. However, just a few I have used on my site include:

- share my content on social media
- sign up for my newsletter
- view a video
- download an ebook or report
- attend a webinar
- sign up for a course
- buy one of my books
- send me an email
- book a meeting
- view my services
- listen to my podcast
- pick up the phone
- post a comment on social media

You get the idea, and as you can see, there are so many micro-interactions you can use to start the engagement between you and a user. Take your time to consider which call to action will be most appropriate to which stage of the journey. Asking people to book a meeting when they are only at an initial research phase doesn't make a lot of sense. Timing is everything, and it is essential to pick the right moment.

As a case in point, I once visited a site that sold T-shirts. On arriving at the website, it immediately presented me with a call-to-action overlay asking me to sign up for their newsletter. In return, the call to action told me, I could have 10% off my first order. Unsurprisingly I immediately closed the overlay. After all, I hadn't even seen any T-shirts. How did I know I wanted 10% off?

That in itself would have been bad enough. By asking too early, the site had missed the opportunity to make a connection. But unfortunately, it got worse. I continued to browse the site and found that, sure enough, they had many T-shirts I liked the look of. Now I was ready for my 10% off. However, I had closed the overlay and so had no way of getting it.

The result of this error in timing was that all the T-shirts looked overpriced. I should be getting them 10% cheaper than that. In the end, I abandoned the site frustrated by the whole experience. They missed out on an opportunity to connect with me over the long term. However, they also lost a sale, the very reason they wanted to communicate in the first place!

The question you must ask as you look at your calls to action for each stage of the journey is whether it is an appropriate action for where the user is at the time. You can ascertain this by looking at the other information you know about the user from the customer journey map. Does your call to action help them answer one of their questions, overcome one of their objections, or address one of their tasks? Does it resonate with how they are feeling, or help them solve a pain point? Ultimately, does it help the user feel they are moving towards their overall goal?

Timing can make an enormous difference, as I discovered for myself on my site. Like most bloggers, I am keen to attract more newsletter sign-ups, and so I placed my call to action high on the page for visitors to see it as soon as they arrived on my site. That worked to some extent, but I was disappointed with the results.

In desperation, I tried an overlay that displayed as soon as people hit the site. It helped a little but also caused a spike in my bounce rate as people abandoned the site because of the annoying overlay. Then I tried moving the newsletter sign-up form to the bottom of each blog post. I hoped that once people had a chance to see my content, they would be more receptive to signing up. Sure enough, it worked. People needed to see that my content was of value before they were willing to sign up to my newsletter.

That said, getting the timing right and showing you can deliver value isn't enough to deliver business results. A call to action also has to move the user down the sales funnel. That means you need to be clear about the role any particular call to action has.

DECIDE ON YOUR CALL TO ACTION'S ROLE

The role of any particular call to action may seem obvious. After all, a call to action to sign up for a newsletter is trying to gather newsletter subscriptions! But that isn't the whole story. You need to ask yourself why you want those newsletter sign-ups and how that moves the user down the sales funnel.

Most of the time, I categorize the role of calls to action into five broad groups designed to:

- grab attention
- maintain a relationship

- reassure the user
- encourage action
- help spread the word

So a call to action asking people to sign up for a newsletter is designed to maintain the relationship. We want their email addresses so we can keep engaging them. By the same token, asking somebody to share your content is about spreading the word and encouraging word-of-mouth recommendation.

Notice how these categories also reflect your average sales process. First, you need to get people's attention, then establish and maintain a relationship. After that, you have to address their objections before asking them to act. Finally, once they are a happy customer, you encourage them to recommend you.

Once you start categorizing your calls to action, it becomes more obvious where to place them in the sales funnel and, by extension, when to ask users to complete it. For instance, you wouldn't ask a user to sign up for a newsletter as soon as they arrive on the site because you don't yet have their full attention. They need to look at content and maybe watch a video first before they will be ready.

With a bit of consideration, you should be able to identify one or more calls to action for each stage in the journey. These are moments in their experience when you can ask them to complete a micro-interaction.

Micro-interactions might include actions such as:

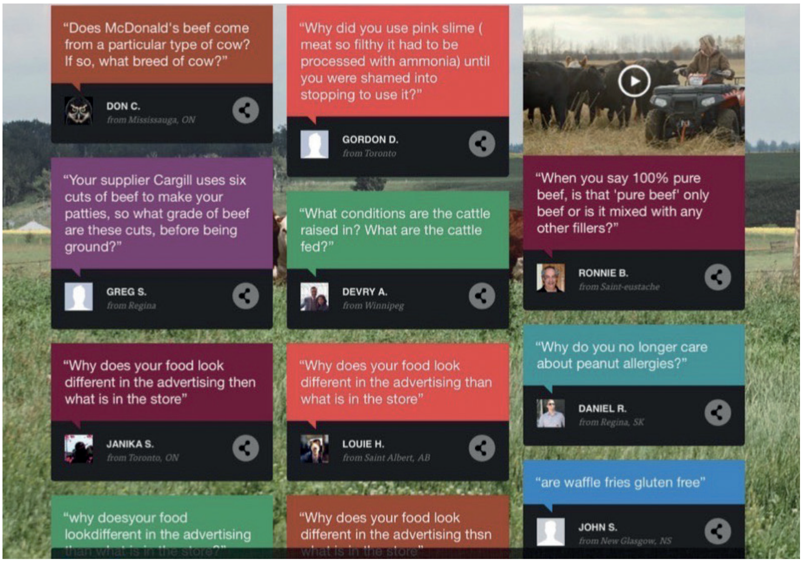
- visiting a landing page
- reading a post

- sharing on social media
- following you on social media
- signing up for a newsletter
- viewing a related article
- attending a webinar
- downloading a fact sheet
- ordering a sample
- signing up for a free trial

Knowing when each of these calls to action should happen is important for two reasons. First, as we have already established, it will help pick your moment to ask people to complete the call to action. That will shape where and how you display your call to action. Second, it will help shape the messaging that goes with the call to action. We can look at the questions, tasks, feelings, and objections the user faces at that point in the journey and tailor our messaging to address those.

For example, if we want to reassure users as they research your company, our action might be a link to a specific section that addresses this. McDonald's does a great job of this. They know that many parents are worried about what exactly is in McDonald's food, and they address some of the rumors about quality head-on in a dedicated section of their site.

We will explore messaging surrounding calls to action in later chapters. For now, it is only necessary to note that you should directly connect this messaging to where the user is in their journey and, by extension, the sales funnel. Instead, let's move on to measuring the effectiveness of your calls to action.



McDonald's has not been afraid to address customer concerns.

DEFINE CLEAR METRICS FOR YOUR CALLS TO ACTION

Your sales funnel is like a leaky pipe. Users flow into the top and then slowly dribble out through holes before a small number reach the end. To some extent, this is inevitable. You are not going to convert 100% of people who enter your funnel. However, we do want to patch as many leaks as possible. To do that we need to know where the pipe is leaking.

We cannot just track our final conversion rate and the number of people entering the funnel at the top. We need to follow them throughout the journey, which requires us to track the number of users completing our various calls to action along the way.

Let's look at a sales funnel for selling an online course:

- Making the customer aware of your course
- Encouraging their interest

- Helping them evaluate the course
- Creating a desire to take the course
- Encourage enrolment

Various touchpoints will support each of those stages:

- Awareness: pay-per-click advertising
- Interest: landing page
- Evaluate: course details
- Desire: course sample
- Enrolment: checkout

Now we can map calls to action against each of those to track where people are potentially dropping out of our sales funnel:

- Click pay-per-click ad
- Click through to view course details
- Request a course sample
- Begin the checkout process
- Complete checkout process

If one call to action is performing poorly, we know that there is work to do in that part of the journey.

Unfortunately, it's not just a matter of measuring how many people complete a specific call to action. You may remember in chapter 2 when we discussed metrics; I talked about the need to monitor quality as well as quantity. That is just as applicable here. If you don't have the right kind of people completing a call to action, then they will inevitably drop out at some point in the funnel.

I won't repeat everything I said in chapter 2. However, I do want to emphasize the need to track the conversion rate of each interaction and its quality. What exactly quality means will depend on the action, but again, that is something we covered earlier in the book. As I have already said, we do this so we can identify leaks in our sales funnel, and that is worthwhile when it comes to working on projects.

Define Projects Based on Sales Funnel Weaknesses

I have been privileged to work with some very prestigious businesses from an enormous range of sectors. I have worked with multinationals, global e-commerce businesses, and international charities. And despite working with supposedly world-class organizations, I am continually surprised at just how little thinking goes into most of their projects, especially around the area of conversion optimization.

Most attempts to improve conversion seem to begin with somebody in senior management, having a bright idea about something which might make things better. They rarely base this on anything other than a hunch and their experience. When these companies turn those ideas into projects, they aren't prioritized by the potential return on investment or their ability to improve conversion. No, they are prioritized by urgency or how senior their sponsor is. As for the projects themselves, they are based on the executive vision and around internal politics. Rarely are they shaped by research or a broader picture of their place in the sales funnel.

Sound familiar? Chances are, whatever the size of your organization, you suffer from similar problems. It is hardly surprising, then, that most conversion optimization initiatives fail. If you want to improve the conversion rate on your website, you need a strategy. Fortunately, your customer journey map and sales funnel will go a long way towards helping you address these shortcomings in project management.

IDENTIFYING PROJECTS USING YOUR SALES FUNNEL

A customer journey map and associated sales funnel are excellent tools for identifying potential projects. They are certainly a lot more useful than your management's best guess!

Remember I mentioned that a sales funnel is like a leaking pipe? Well, your sales funnel, customer journey map, and associated metrics are excellent tools for identifying where those leaks are occurring. By assessing these, you will see the weak points where you are losing users or providing them with an inferior experience.

Once you have identified these weaknesses, you can define projects to help fix the leaks. That might be optimizing a call to action, providing a better incentive, or redefining your offering. Big or small, these projects will have a clearly defined objective of plugging a leak. Best of all, these projects will be identified with research and within the context of a broader strategy, rather than being the best guess of senior management.

PRIORITIZING PROJECTS USING YOUR SALES FUNNEL

Of course, to begin with, you will have a lot of leaks to plug. That means a lot of potential projects that will need prioritizing. Once again, this is where our customer journey map, sales funnel, and metrics can help. Instead of prioritizing projects based on who shouts the loudest, we can see which projects are likely to have the highest impact on conversion.

For instance, I once worked with a charity that invested heavily in TV advertising every year, only to drive potential donors to a massively under-performing website. They prioritized TV advertising because a vocal and opinionated stakeholder championed it. We defined their sales funnel and gathered metrics for each step along the journey. That showed us that they should prioritize improvements to the website before further investment in TV advertising.

Being able to see the sales funnel and journey mapped out is powerful, helping you understand where the problems are and gain clarity about the order in which they should be addressed. However, even once a project is identified and prioritized, your customer journey map can still prove hugely useful in improving conversion.

DEFINING PROJECTS USING YOUR SALES FUNNEL

Any digital project involves hundreds of decisions, both during the definition phase and development. Often these decisions are based on nothing more than experience and intuition. These both have their place, but they come with danger – it is easy to lose sight of the user.

A relentless focus on what the user wants and needs is crucial to improve your conversion rate successfully, and your customer journey map can provide that. The customer journey map has everything you need to know to guide and focus on any associated projects. By looking at it, you can see what tasks the user needs to complete to progress down the sales funnel, what questions they have at each step, and how they are feeling. Most importantly, it will show you what objections the user might be having that you need to address.

Address Objections and Reduce Risks

CHAPTER

5

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Address Objections and Reduce Risks

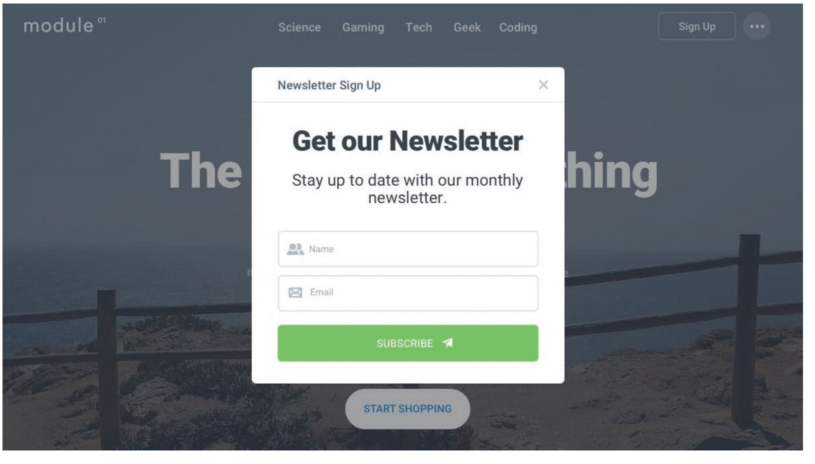
I had been working at IBM for over three years and I was miserable. I had managers I didn't respect, and I was stuck in a role that colleagues underappreciated, in a department sidelined by the company in favor of centralized control. I had talked about leaving endlessly. I knew I was underpaid and that my skills were much in demand, yet I never quite got around to it.

Every time I started to think seriously about it, an inner monologue would talk me out of it. I would throw up objection after objection as to why I was better sticking with the status quo. I would convince myself that the jobs I was looking at would be no better, or that they would lack the job security I had at IBM.

My subconscious trapped me. My primal brain didn't like the idea of the unknown or what I might lose from a job move. Meanwhile, my logical mind was overthinking things, crippled by its cynicism and the overwhelming number of variables at play.

No doubt, you have found yourself in similar situations. It might not have been over moving jobs, but chances are you have faced some other problem that has led to the same indecision. We face this feeling to varying degrees all the time, whether it is deciding where to go on holiday or whether to buy a new laptop. The bigger the decision, the more reluctant we are, and the longer the list of objections or concerns we need to resolve in our minds before proceeding. However, even the smallest decision will spark this reticence.

Of course, our customers suffer from these feelings too, and just like us, can convince themselves not to take action.



When a user sees a newsletter sign-up form they are quick to think of reasons not to subscribe.

Take even the simplest of actions: signing up for a newsletter. Together, your fearful primal brain and your cynical system can come up with no shortage of reasons why you shouldn't sign up.

- What if they sell my email address to a third party?
- What if the content is rubbish?

- What if they make it hard to unsubscribe?
- What if they send me too many emails?
- What if they pressure me into buying?
- What if they get hacked?

We never seem to have a shortage of what-if scenarios for even the most trivial of decisions.

That creates a challenge for us as those seeking to encourage action. We find ourselves fighting two aspects of human behavior: the user's aversion to loss, and their natural cynicism – characteristics made all the more intense by a lack of information on the basis of which to make these decisions.

How, then, do we address these problems and overcome people's objections? We do so by reducing the risk of loss and building trust.

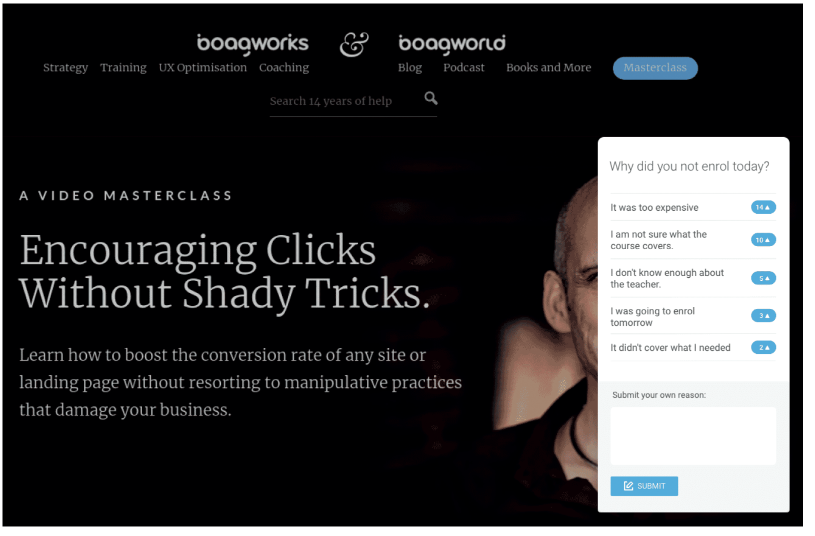
In the next chapter, we will focus on building trust. For now, however, let's look at reducing risk, which begins by understanding precisely what those risks are.

Identify the Risks

By far the best way of understanding the risks users have is to ask them. Yes, I am aware this sounds blindingly obvious, but have you done it? I am continually surprised by how few people do.

There is nothing complicated or challenging about identifying the objections and risks users perceive: you ask them. That might be in a survey displayed when users go to leave your site without buying, or it could be a question asked on social media or in user interviews.

You could even use a social voting tool like Tricider to allow users to submit concerns and vote for suggestions others have made.



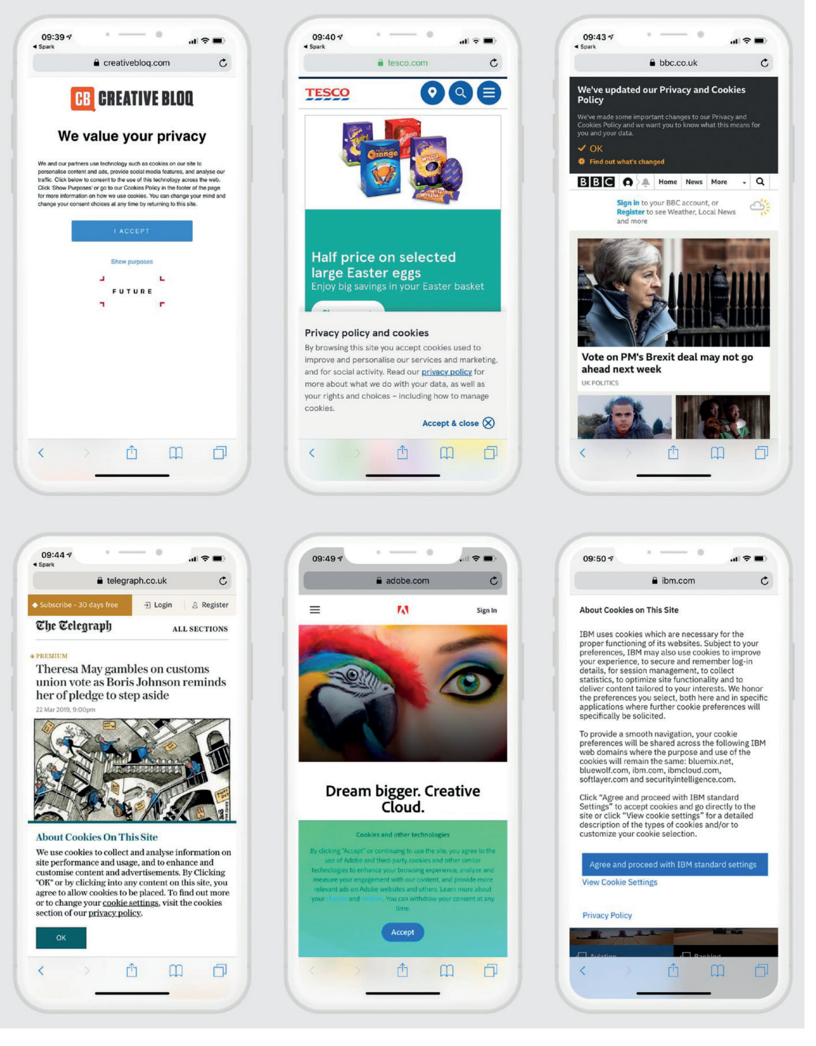
A simple survey can be enough to understand the risks users perceive.

That said, there is no shortage of common risks that are relatively generic. Depending on the audience, the intensity with which they will feel these risks will vary. However, the same concerns raise their heads again and again – concerns like those around privacy.

WORRIES ABOUT PRIVACY

An increasing number of people are worried about their data and irritated by companies that share it with third parties. That is especially true in light of the exposure GDPR legislation has brought to the issue.

This book is not about how to comply with GDPR and other legislation. It is not enough to adhere to the letter of the law if you want to alleviate concerns. Some compliance rules do nothing but increase worries, such as intimidating terms and conditions that nobody has the time to read, but they know they should. Also, don't even get me started on cookie notifications, which are a significant usability hurdle.

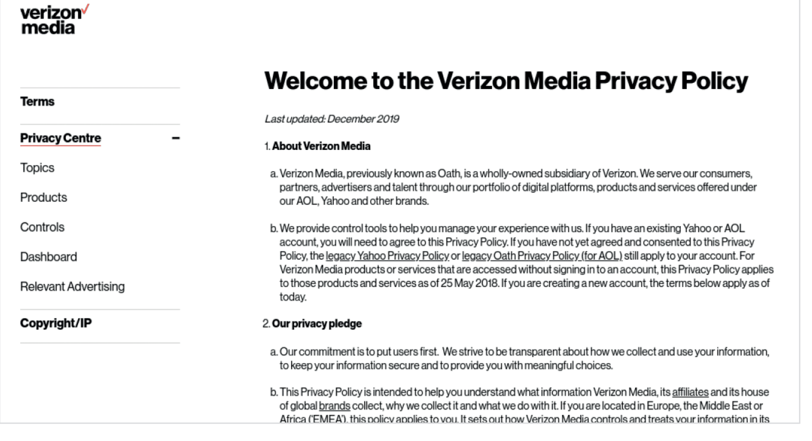


Cookie notifications do nothing to reassure users and create an unnecessary usability hurdle.

The degree to which people are concerned about privacy will depend on numerous factors such as age and culture. Understanding the strength of feeling will help you work out how prominently you should feature this issue on your site.

Whatever the case, it is crucial to consider privacy as a conversion issue and not just one of compliance. You have to make sure that the steps you take to address privacy also reassure users. Too often, things like privacy statements are more about covering the companies' liabilities than reducing user risk. Most websites have an excellent privacy policy if their aim is to protect the company, and yet they are terrible for reassuring the user.

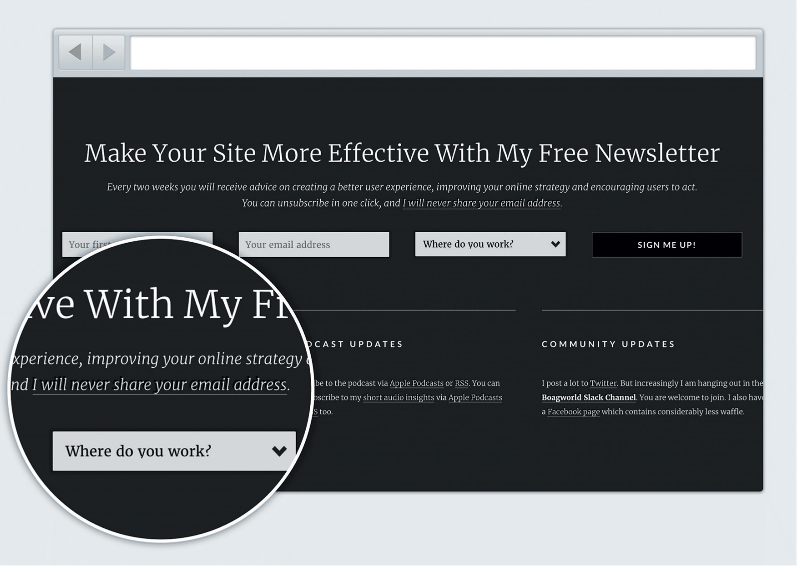
For a start, most of them are a fatal combination of legal jargon and technobabble. If these policies are not talking about indemnity and legal jurisdiction, they are spouting terms like "session trackers" or "third-party services." It is hardly surprising that people are suspicious of a company's commitment to their privacy when they don't understand how the company protects them.



Privacy pages typically do little to reassure users about how their data will be used.

Then there is how hard users have to look for these policies. Imagine for a moment you are being asked to register for a website. It is something that you want to do, but your primal brain is worried and your logical mind is cynical. What is this company going to do with your data? Too often, you have to scroll to the footer of the site and start hunting for that tiny link about privacy. Why?

A simple sentence right at the point of registering would instantly reassure the user without the need for them to engage in a website treasure hunt.



When I ask people to sign up to my newsletter on my website, I provide a link to my privacy policy right there.

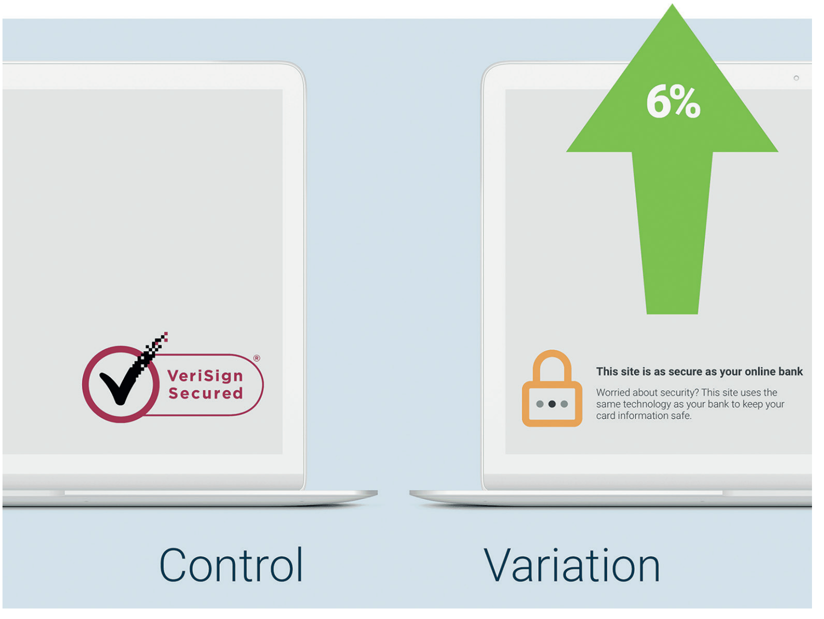
At least, it would reassure them if the sentence wasn't vague to the point of being meaningless. The number of times I have read a sentence like, "We care about your privacy" at moments like these. That does nothing to reassure. Instead, try a line like, "We will never share your personal information with anybody" or "We only use your data to identify you when you log in." Of course, to write a line like that it has to be accurate, and many companies are terrible at actually respecting people's personal data. That flags a more significant issue about how organizational policy has as much of an impact on conversion as the design or the interface, or how compelling the copy is. Another example of this is security.

CONCERNS OVER SECURITY

Users worry that their data might be breached, such as when Ashley Madison was hacked, exposing the email addresses of thousands of people seeking affairs to the public. And although people are worried about their email addresses being stolen, they are more concerned about their financial data, like credit card numbers.

The number of scare stories and urban legends around credit card fraud (as well as real occurrences) have made many people paranoid about purchasing online. We need to take every opportunity to address this concern if we need people to part with sensitive financial data.

An excellent example of this was an e-commerce website I worked on. When reviewing the checkout process, I noticed a spike in users dropping out at the payment page. After watching back some sessions, I formed a hypothesis that people were worried about entering their credit card details. The site had a "VeriSign Secured" message, but I was reasonably sure most users didn't know what this meant. I decided to run some A/B tests and discovered that, sure enough, that was indeed the problem. In fact, by replacing the VeriSign message with a padlock and some text about the security being the same as that used by their bank, conversion increased by a staggering 6%.



By clearly addressing user's concerns, I was able to improve the conversion rate on one e-commerce site by 6%.

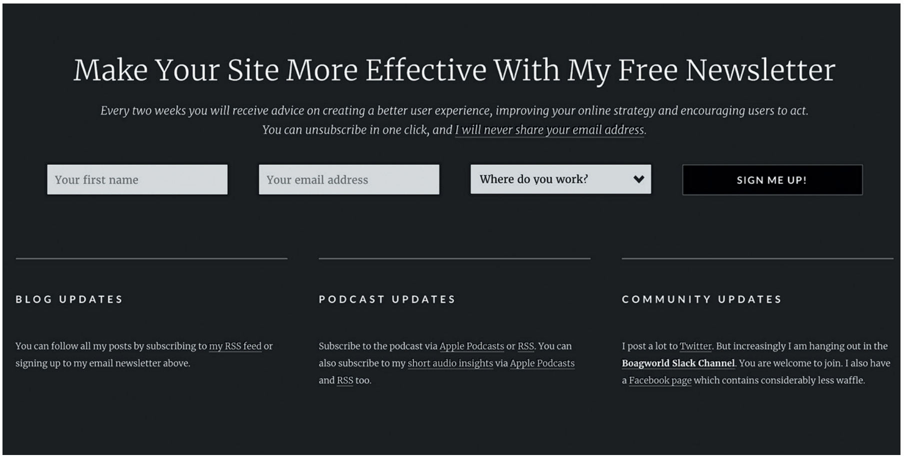
The moral of the story is that perception matters as much as reality. Yes, our websites need to be secure, but from a conversion perspective, it is equally essential that we communicate the fact that our sites are safe to users. We cannot assume that users understand that a padlock in the address bar shows a site is secure, or that they will know that a Verisign logo or a message about 128-bit encryption are good things. We need to communicate clearly in language the user can understand.

Of course, it is not just criminals getting their hands on personal data that concerns people. They are also worried about what you might do with that data.

IRRITATIONS ABOUT SPAM

I bet you like to moan about spam. We all enjoy grumbling about it, and we all hate receiving it. But there is often a disconnect: on the one hand, we hate it; and yet, on the other hand, we are often responsible for sending it. I am sure you don't consider the emails you send to be spam. However, spam is in the eye of the beholder, and what you think and what your users think can be very different things. Notifications, updates, and special offers can – if sent too often – drive users crazy.

Even if your emails are invaluable, users still worry they might not be, and so we need to reassure them. Nobody wants their inbox filled with irrelevant rubbish. It is hardly surprising that users are reluctant to hand over their email address when we ask. When asking a user to share their email address, we should explain how we are going to use it, and how often they can expect to hear from us.



The copy associated with my newsletter sign-up focuses on addressing users' questions.

My newsletter has a sign-up form that demonstrates my point. When I ask people to sign up, I provide the following information:

> *Every two weeks you will receive support improving your site by creating a better user experience and a more effective digital strategy. You can unsubscribe in one click, and I will never share your email address.*

In those two sentences I address four concerns:

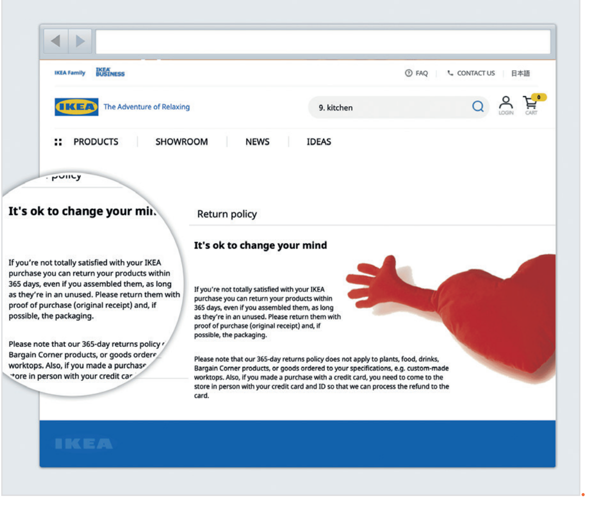
- How often subscribers will receive emails.
- What those emails cover and, by extension, their usefulness.
- What I will do with their email address.
- Whether it is easy to unsubscribe.

The point about unsubscribing is particularly important as this relates to another concern front-and-center in users' minds – how committed will they be to this decision?

CONCERNS OVER MAKING A MISTAKE

Every call to action requires some commitment from the user. That might be something as simple as being associated with the content they have just shared, to something huge like a contract committing them to spend millions with a supplier.

Commitment restricts us, reducing our options. The primal brain views this as dangerous. It makes us feel trapped and takes away our ability to flee if we are unhappy. As a result, one of the concerns users have is just how big a commitment they're making. The bigger the commitment, the harder we have to work to reassure the user. With something like newsletter sign-up, that means giving them a straightforward method of unsubscribing. With something more significant like an e-commerce purchase, it might be a good returns policy.



By offering an excellent returns policy, IKEA addresses users' concerns about buying the wrong thing

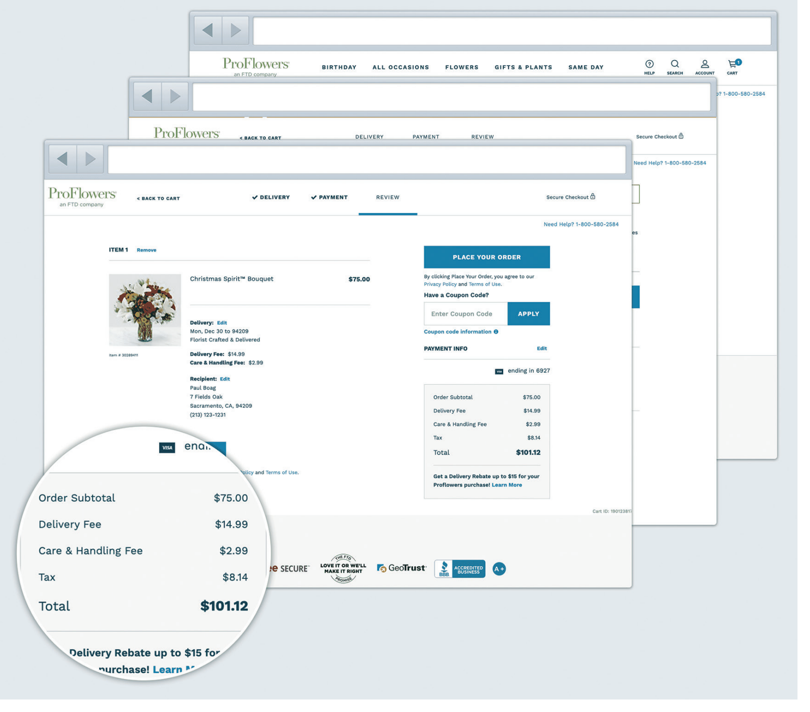
In short, wherever possible make it easy for the user to undo any commitment. They rarely will, but they like to know they can if they want.

And it is not just something trapping us that the primal brain fears. It also does not like to be surprised.

SURPRISED BY HIDDEN COSTS

Surprises trigger our fight-or-flight response, and our brains are always on the lookout for this kind of perceived danger.

Experience has taught users that many websites often surprise them with hidden costs associated with their calls to action. Sites tend to downplay the risks or hide them entirely. Delivery charges are probably the most common example of this. How many times have you got halfway through a checkout process only to be surprised with a delivery fee that you had not expected?



Sites like ProFlowers hide delivery costs until the end of checkout. This makes users worry about hidden delivery charges.

I am beginning to notice a trend when I carry out surveys and test e-commerce sites with users. I increasingly find that people will ask about delivery cost up front. They have learned that e-commerce sites hide this information and so actively look for it. Based on my observations, when it is not there, they become suspicious.

However, delivery charges are not the only nasty surprises we hit users with. Forms are another excellent example. We often place uncomfortable fields later. For instance, if we need people to approve terms and conditions that we know they won't like, we typically put these at the end of the process.

In truth, these kinds of techniques will work. People will often swallow a surprise at this late stage because of something called "sunk costs." We feel like we have invested so much time and energy into the process that we are unwilling to give up. Just because it works, however, doesn't mean it is wise, as we discussed in chapter 1 on dark patterns. You are just creating problems for the business further down the line.

Wasted time is another significant risk that users perceive.

FRUSTRATIONS OVER WASTED TIME

For most people, time is one of the most precious commodities. We tend to avoid anything we think will waste our time. We are reluctant to call customer support because we know we will spend time on hold. We put off long application processes such as getting insurance or applying for a loan because we know it will take too long. We worry that a website might be slow-loading or challenging to use because that will eat into our time.

> Waste users' time at your peril. If you want to maximize conversion, you must prove to users that you see their time as precious.

It is hardly surprising that something like site performance has a direct correlation with conversion. According to research collated by LoadStorm,[16] a 1-second delay in load time leads to a 7% drop in conversion and 11% fewer page views. A staggering 1 in 4 people will abandon a page that takes longer than 4 seconds to load. What is more, things are even worse on mobile, with 74% of users giving up if a page takes 5 seconds or more to load.

16 https://smashed.by/loadstorm

Waste users' time at your peril. If you want to maximize conversion, you must prove to users that you see their time as precious. How do we encourage users to proceed when there are bitter pills to swallow? How do we help users to overcome their objections? A good starting point is to remove as many of these risks as possible.

Remove the Risk

I have been working on the web for a long time. In fact, I remember the early days of e-commerce. One big debate in those days was what users would be willing to buy online. Amazon had proved that people would buy books, but some things seemed impossible to sell without consumers getting to see and try the product in person. One example of this was shoes. Received wisdom was that consumers wanted to try shoes on to make sure they were comfortable and see them for themselves. People wouldn't be willing to risk ending up with a pair of shoes that didn't fit or weren't what they expected.

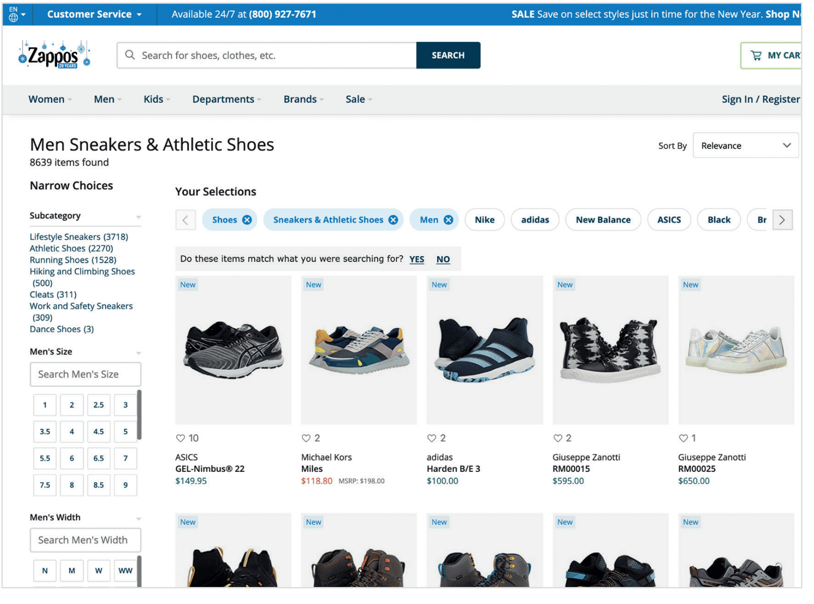
Of course, today we know very well that you can sell shoes online. But that's not to say our assessment of what people wanted back then was wrong. People definitely do want to try shoes on and see them for themselves. But they are willing to buy shoes online now because retailers have removed the risk of a customer ending up with a pair of shoes they do not like. The solution was to offer an exceptional returns policy.

Returning products wasn't new, of course; consumers have always been able to do that. What was different was that retailers removed the cost associated with that return. There was a time when consumers would have to pay return postage. Today, retailers are swallowing the cost of that.

However, the cost to users is not just about money. It is also about time and effort, as I explained earlier. Returning items can be a hassle, and many consumers are reluctant to make the effort involved. Retailers are well aware of this and are increasingly removing this risk too. Some provide prepaid return bags with orders so the customer doesn't have to worry about packing. Others even offer courier collection, so there's no need to post the product back.

In reality, companies are not removing these risks. They are taken on by the retailer as part of the cost of sale. The result is that the leader in online shoe retailing, Zappos, was sold to Amazon for $1.2 billion and makes over $2 billion in revenue annually.

Removing risks might well be the number one way of increasing the conversion on your website and can happen at all levels of



Zappos' success was largely due to its willingness to take on the risks that normally remained with the customer.

your business. Occasionally it will require fundamental change in how you sell (such as offering an exceptional returns policy), but there are times when we can implement more easily; it doesn't take much effort to resist the urge to ask users for information you do not need or make unsubscribing from a newsletter hard.

That said, persuading colleagues to agree to these changes can be more challenging, whether big or small. I have worked with marketing teams who insist on gathering all kinds of unnecessary information. That is where measuring becomes so vital. You need to be able to prove that the risk you want to remove is hurting conversion.

Whether something big, like prepaid returns, or small, like optional fields, the process for removing the risk is the same. You need to start by quantifying the cost of the risk to the business by running a test. Most of the time, this involves removing the risk for a proportion of your visitors, or for a limited time, and seeing what impact that has on conversion.

For instance, what happens to conversion if you offer users pre-paid returns for a set period? Alternatively, would the number of people contacting you increase if you didn't force a subset of your users to register when viewing your product demo? This kind of A/B testing should be an ongoing part of our processes. We should always be experimenting with the impact of removing or addressing risk. You will find colleagues a lot more open to trying new approaches on a limited basis and much more likely to be convinced by the results of those tests than by your opinions.

Unfortunately, we cannot remove all risks and even if we could, it doesn't stop users believing there is a risk. That is why it is so important to address these risks and associated objections.

Address the Risk

I shared some examples of how you can address the user's perceived risks when I talked about newsletter sign-up, privacy, and security. Now, let's draw out some principles from these examples that you can apply to almost any objection that users might have. Let's begin by addressing the biggest mistake I see companies make – pretending the risk doesn't exist.

DO NOT AVOID MENTIONING RISKS

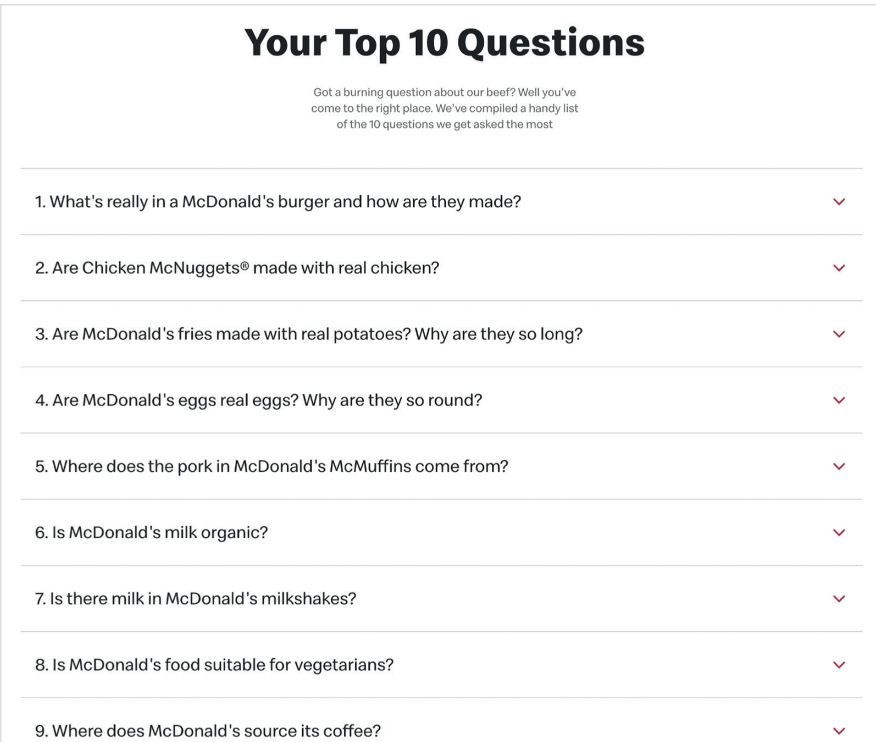
You could argue that drawing attention to potential risks could plant those risks in people's minds and, by extension, reduce conversion. Why, some would say, would you draw attention to the dangers of taking action?

That is certainly a fair question if only a small portion of your audience have those concerns. However, there is a good chance that if some of your audience have thought of a risk, most have. People are savvier than we give them credit for. Also, there are many risks, such as the ones I have discussed in this chapter, that are near-universal. The vast majority of people will worry about privacy, security, spam, and making a mistake, because our culture or psychology has baked them into our thinking.

That said, what if you have suspicions that users are concerned about a more specific risk? For example, what if there have been negative comments about some aspect of your product or service? The temptation is not to address the objection, because you don't want to draw attention to it. But it is essential to remember the world we live in.

We live in a world where every mention of your products and services is instantly available to consumers from a device in their pockets. There is no sweeping things under the carpet when it comes to the web. Every negative comment is just a click away, and so we are forced to address anything a user might consider a risk.

We can still choose how we address these issues. Take McDonald's, which does an excellent job at reassuring parents about their food. Let's be honest: we have all heard the rumours about McDonald's. Stories that suggest chicken nuggets contain bits of the bird most of us would prefer not to eat, or that the fries don't contain actual potato. These are certainly not the kind of objections you would want to advertise. Yet McDonald's doesn't ignore them.



McDonald's is not afraid to confront the questions people have about its products.

In fact, McDonald's is very direct about what exactly is in their McNuggets. In its "Good To Know" section is a frequently asked question that reads:

> *Are Chicken McNuggets® made with real chicken?*

The reply is equally direct:

> *Chicken breast meat is the only meat we use across our entire chicken range, including our McNuggets®.*

Notice that McDonald's doesn't repeat the rumors about the product. They address the objection without explicitly citing it.

By adopting this approach, you focus on the objection but in such a way that reads as a positive message. It even has the advantage of suggesting to your users that they should be asking whether your competitors can make the same claims.

Once again, users are not stupid and can see through a lot more spin than we credit them for. Although there is little reason not to address potential risks in a positive light, exactly how prominently you do so is up for debate. That said, too often companies force users to hunt for the reassurance they crave.

DO NOT MAKE USERS HUNT FOR ANSWERS

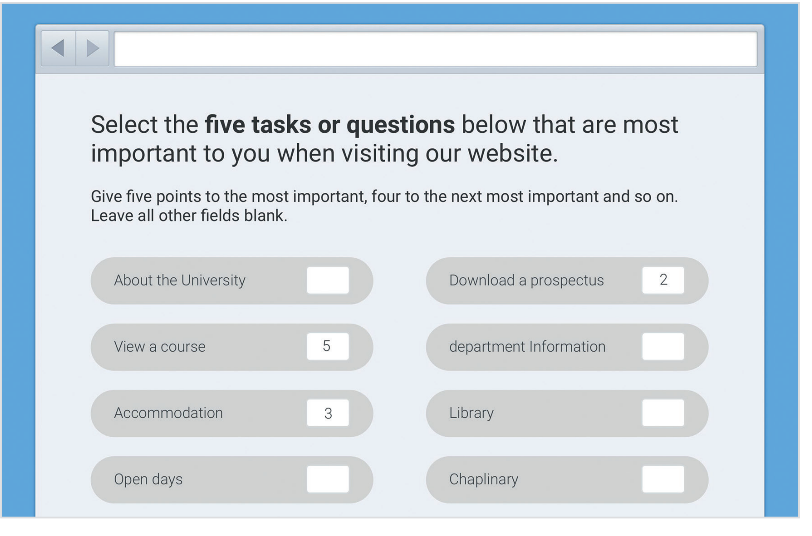
How prominently you feature a response to a perceived risk depends on three factors:

1. How many of your audience are concerned about the risk.
2. Which segments of your audience have that concern.
3. How strongly the anxiety affects their decision to act.

Once more, this emphasizes the importance of user research in encouraging action. For example, when I ran the one-question survey for my masterclass, not all users gave the same answer as to why they weren't enrolling. Although the vast majority of users indicated price was the primary barrier, others expressed concern over other aspects, such as the class content or the qualifications of the trainer. It was the relative weightings of the answers that gave me a clear indication of which objections were most common.

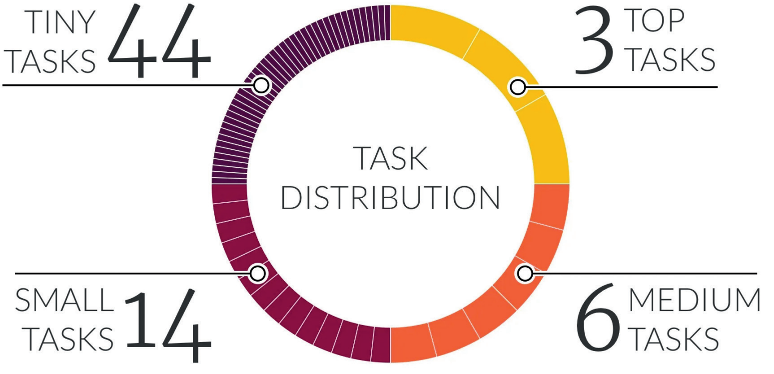
Another way of ascertaining this would be by using top task analysis. Top task analysis is a technique created by usability expert Gerry McGovern to ascertain what tasks users most want to complete on a website, tasks that can include getting answers to their objections.

A top task analysis is a survey that asks users to prioritize their top tasks from a long list of potential tasks. The user is asked to give five to their most important task, four to the next, down to one. All the rest of the tasks are left blank.



Top task analysis can be used to establish which questions are most pressing to users.

What is interesting about top task analysis is that almost always a small number of tasks dominate users' thinking. Not all concerns users have are equal. Some weigh more heavily on their minds than others.



Typically, a small number of tasks dominate users' thinking.

Establishing what these top objections are is crucial to improving conversion. These are the tasks you must ensure your site addresses. Yes, it would help if you were addressing less critical objections too, but they cannot be allowed to crowd out more important issues. It is easy to overwhelm users with noise.

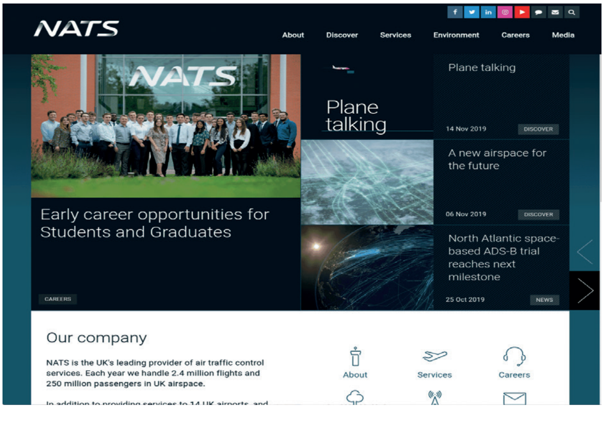
Top task analysis helps in two ways. Not only does it ascertain which concerns are most common among users (the number of votes), it also helps understand the intensity of those concerns (the ranking of the votes).

You may want to segment your results by the audience as well. Not all users are of equal value to a business, and different audiences will potentially have various concerns. You would think that a statement like, "Not all users are of equal value to a business" would be something we could take for granted. In my experience, however, organizations are often reluctant to prioritize one audience over another. It will create all kinds of issues when attempting to optimize your conversion rate, not least the different audiences' competing concerns.

When it comes to conversion, we need to design for somebody specific. It is not enough to try to create a universal design that pleases everybody: you will please nobody. That is not to say you should ignore secondary audiences. It is just that the more focused you are, the more compelling your offering will be.

From an objection-handling standpoint, this means putting the answers to your primary audience's objections front-and-center. You cannot afford to ask them to hunt for reassurance. Meanwhile, we should address the objections of secondary audiences, but they can afford to be less visible to avoid distracting the primary audience.

An excellent example of this was the work I did with UK National Air Traffic Control Services. When I worked on their website, we discovered by far their biggest audience was plane spotters. However, although they made up the majority of users, they were not an audience that provided any real value to the organization.



Although plane spotters are the largest single group visiting the NATS website, they are not the audience the company focuses on.

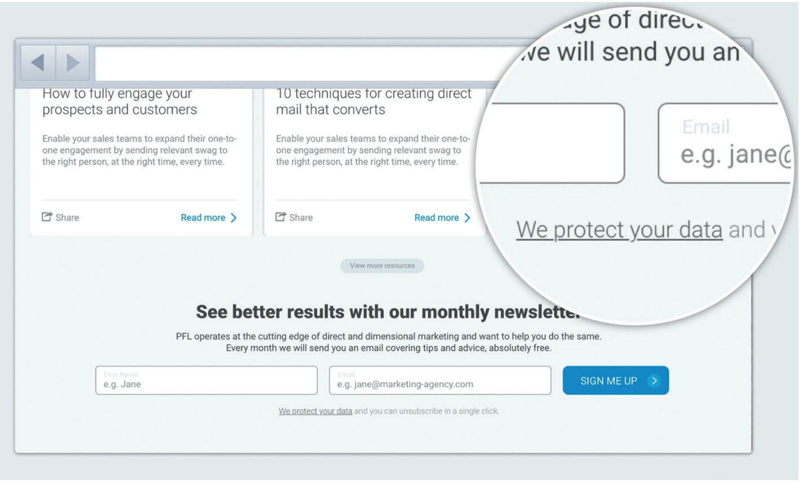
As we designed the website, it would have been easy to have become distracted by the needs of this group. However, we worked hard to ensure that although we accommodated this audience, we didn't allow their needs to compromise addressing the requirements of the primary audience.

Not that we should just be concerned with addressing the right risks for the right audiences. We also need to consider where it is most appropriate to address specific risks. That is because if we get our placement wrong, users may miss them entirely. Human beings are lazy, or if you prefer, evolutionarily programmed to conserve energy. As a result, we tend to rely on intuition rather than having to think. In most cases, we are not going to search for answers to our objections. If the answer is not right in front of us as we think about the objection, we are likely to rely on intuition. We will create a story that seems plausible, rather than searching out all of the facts. In other words, we jump to conclusions.

Take privacy. Most users have been conditioned by high-profile news stories to presume that websites will invade their privacy in various ways. Therefore, when faced with entering personal data, we suppose the site will use that data for nefarious purposes. We don't stop to consider if we have all the facts. We make that assumption based on the story we have concocted using our past experiences and beliefs. Even if you have a well-written and reassuring privacy policy, if the user has to go searching for it, it will be meaningless. The same is true for literally any other perceived risk the user might have.

How do we address this problem? The answer lies in closely connecting any objection handling with the action a user has to take. If a user is asked to provide personal details like an email address, we need to provide reassurance right there on the same page. That doesn't mean we have to provide our entire privacy policy, but we do need to say something to reassure users about the risk, and provide a link to more details for those particularly concerned.

Even placing the reassurance on the same page is not always enough. Users can easily miss in-page messaging if it is not immediately next to a call to action. For instance, if you are asking someone to enter their email address, place your objection-handling copy alongside the email field, rather than at the bottom of the page.



Closely associating reassurances regarding privacy with a newsletter sign-up form often increases conversion.

That is in part because users will be less likely to see messaging elsewhere, but it can also be because the user may not think of the objection until they see the email form field. If the user is reassured before they have considered the risk, it might not remain in the front of their mind when they face the email field.

Unfortunately, we cannot address all objections as easily. Most transactions will involve a degree of risk to both parties. Where there is a risk we cannot remove or address, we need to make it a risk worth taking.

MAKE RISKS WORTH TAKING

Some research has shown that people feel loss approximately twice as intensely as gain.[17] That means we have to work hard to convince people that it is worth giving up whatever it is we need them to sacrifice.

It is worth being clear at this point that such sacrifices are not always financial. People often feel sacrifices of time more intensely than they do money. According to loss aversion theory, we feel the loss of money less than some other things because we always intended to use it for transactions. Money is a placeholder for something we want to buy. We do not value it in its own right. We appreciate it for what it can get us. Time, on the other hand, is precious to us in its own right. We don't see it as a tradeable commodity. The same is true for our privacy or our security.

Money is a placeholder for something we want to buy. We do not value it in its own right. Time, on the other hand, is precious to us in its own right. We don't see it as a tradeable commodity.

With this in mind, we need to realize that online we ask people to sacrifice much more than we think. Every moment they spend battling with your website is time they have to sacrifice. Every time we ask them to hand over personal data is a risk in their eyes. These are all risks we need to make worth taking.

17 https://smashed.by/lossvsgain

How, then, do we explain to the user that these minor risks are worth taking to gain the benefit that would come if they were willing to take it? Well, focusing on those benefits is an excellent first step.

FOCUS ON BENEFITS BEFORE FEATURES

If I ask you to sign up for my newsletter, you will immediately start focusing on the potential negatives. However, if I offered you an opportunity to improve your website by receiving advice on optimizing it, your mind perceives the offer differently.

That is rule one of marketing – focus on the benefits your product provides to the buyer, before talking about its features.

While competitors focused on features, Apple focused on benefits when launching the iPod.

We are not very good at making connections, especially when we are not giving something our full attention. As a result, I cannot expect you to make the connection that signing up for a newsletter will result in website improvements. I need to spell that out.

This principle of focusing on benefits applies to anything. I could tell you that I specialize in user experience design, conversion rate optimization, and digital transformation. I could explain that I do this through prototyping, site reviews, testing, and in-house training. But that isn't going to be anywhere near as powerful as saying that I help organizations improve their conversion rate by providing outstanding user experiences.

Put another way, the more specific the benefit, the more powerful the message. So if I talked about improving conversion by a particular percentage on average, that makes the statement even more compelling because it removes the ambiguity, so reducing the reader's skepticism. However, you can take this a step further by changing the user's reference point.

INTRODUCE A NEW REFERENCE POINT

Remember I said we are all loss-averse and users can see taking action as losing something and thus risky. However, what if we reframed our offering so that users became aware of what they lose if they do not take action? Then loss aversion works in our favor.

Let's go back to my newsletter. If I asked users to imagine what their website would look like if it were high performing, we start to set a new reference point. They are now picturing what that new website would look like and the benefits it would bring them.

Now if I suggest the newsletter can help them achieve that, then not signing up for the newsletter becomes a risk. It is a risk of losing out on that vision. I have focused the user on the goal of what they want to achieve, rather than fixating on the short term hurdles.

Now, I am aware this may feel manipulative and bordering on the kinds of techniques we want to avoid. But is it? We are not trying to encourage people to do anything they don't want to do. Quite the opposite!

We are trying to focus them on their goal and not get bogged down in the barriers between them and it. Too often, people and organizations fail to achieve their aims because they get put off by the risks of trying. They start focusing on the wrong things.

Too often, people and organizations fail to achieve their aims because they get put off by the risks of trying. They start focusing on the wrong things.

Changing the user's reference point does have limitations, however, especially if working in B2B, such as in the case of my newsletter. The risk is personal (getting spammed), while the benefit is organizational (a well-performing website). In such instances, you need to appeal to the selfish gene.

APPEAL TO THE SELFISH GENE

People need to be able to see how the benefits of taking the risk will reward them personally. That applies whether talking about B2B or pretty much any product. We need to look deeper when considering somebody's motivations and goals.

I suggested that understanding a user's goal was critical to success, and indeed it is. However, people often have multilayered goals and knowing them all is beneficial for encouraging people to overcome their objections.

Take, for instance, something like Axe body wash or deodorant. These products are aimed squarely at young men, but selling the benefits of their products for those who sit next to them on a train wouldn't go far in increasing sales! Neither would be selling the product using personal hygiene, even though that is a personal benefit. Axe understands there is an underlying reason why young guys want to smell nice. They want to be attractive. Their entire marketing strategy is built around this.

Charitable giving is another example of multiple levels of motivation. Yes, people who give want to help others, and the benefits it provides to recipients will sway donors, but that is not the only motivation. People donate because they feel an obligation, or because they want to be seen as generous. Some donate for social standing, and others to belong to a specific social group. These are selfish motivations, but that doesn't mean givers do not want to help others too.

Yes, people who give want to help others, and the benefits it provides to recipients will sway donors, but that is not the only motivation. People donate because they feel an obligation, or because they want to be seen as generous.

My point is that if you want people to overcome their objections and take action, you need to provide them with as personal and specific a benefit as you can. That will make it evident that any risk involved is worth taking.

You can also help mitigate that risk still further in people's eyes by giving them a sense of control over the risk.

GIVE THE USER CONTROL OVER THE RISK

Imagine a car driving fast down winding, narrow roads. In one scenario, you are the passenger; in the other, you are the driver.

Which is scarier? Most people would say it is worse to be a passenger. We prefer to be in control and when we are not things feel more threatening. If we give users a sense that they are in control of the risk, their fear of it will diminish. That is why horror films that don't show the terrifying monster are often scarier. We cannot see the threat.

It is unknown and that makes it impossible to assess or control. So how do we give the user a sense of control over the risks involved in taking action? First, we can let them see the risk through clear communication.

GIVE YOUR USERS THE FACTS

Watching a horror film, when the threat is perceived but not seen, our primal brain fills in the gaps – and that is rarely good. The more we can communicate about a danger, the more in control the user feels and the less they fear it.

I remember once flying into Dallas, Texas, only to find all outgoing flights were grounded due to snow. The entire airport had shuddered to a halt, and every taxi and hotel was booked solid. The storm had trapped me in the airport along with thousands of disgruntled travellers. I ended up sitting on the floor opposite two information desks for two different airlines. In front of one information desk was an angry crowd; in front of the other, a few bored people milling around. Both airlines were in the same situation, both groups of travellers stuck in the airport. Why, then, was one group so much more worked up than the other?

The answer lay in the different ways each airline handled communication. The airline with the angry crowd had decided only to provide updates when things changed. By contrast, the other airline provided updates every ten minutes, whether there was anything new to say or not. Both were saying the same thing, but because those people received an update regularly and often, they didn't worry. They knew they had the latest information and so weren't left to imagine worse scenarios. They had a sense of control.

I see organizations make this mistake online all the time. For example, I recently switched to a new internet service provider. I received an email saying that my connection date was delayed, but they didn't give me a new time and haven't communicated with me since. Eventually, after repeated attempts to get more information, I cancelled my order.

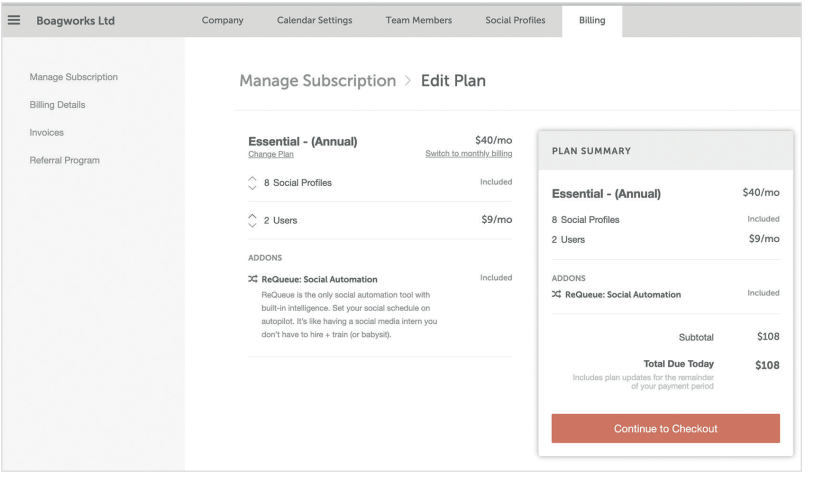
The more information you make available on what will happen when somebody acts, the more in control they will feel and the more likely they will take that action.

That might be something small like telling people how often they will receive emails if they sign up to a newsletter, or something big like the process involved in buying a house. Information is power in the minds of nervous users.

Of course, even better than going into a decision forewarned, is the ability to change your mind if you make a mistake.

ALLOW USERS TO UNDO MISTAKES

When I talked about returns policies, I wrote about the power of changing one's mind. However, it is worth stating again, as it is a powerful tool in making risk more palatable by giving the user a sense of control.



By giving me control over upgrading and downgrading my account, CoSchedule encourages me to try a higher package.

If I know I can unsubscribe from a newsletter easily, I am more willing to sign up. If I can downgrade my cellular tariff in a click, I am more likely to try a higher one. If I have an early breakpoint in a contract with a supplier, I am going to be more comfortable making that commitment.

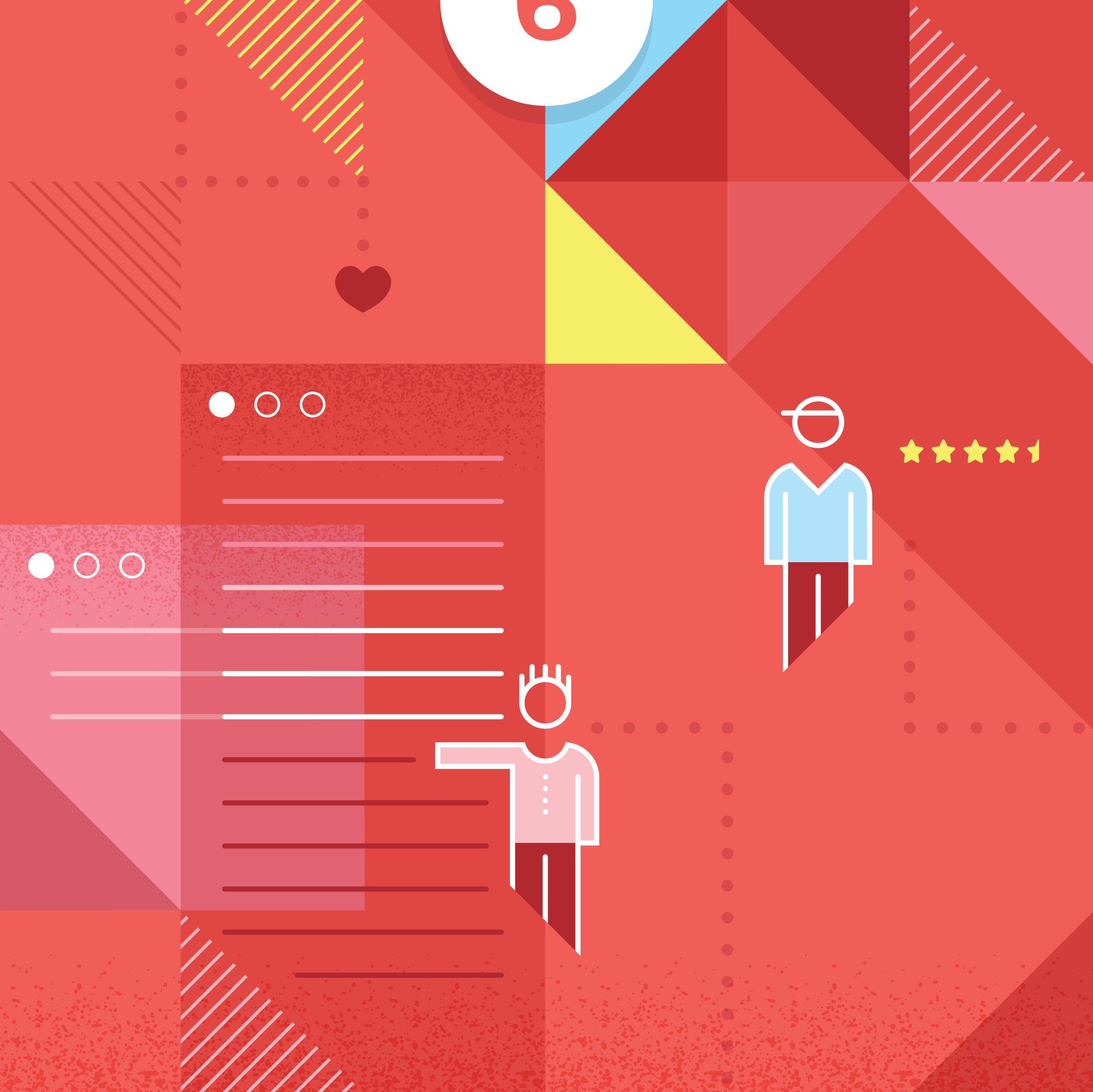
That is still a lesson most organizations have yet to learn. They want to tie in consumers, and so consumers are reluctant to try their products. The tighter the grip on customers, the greater the desire to be free.

With that in mind, we should avoid making unsubscribing or downgrading difficult. We should make it easy to opt out or undo online actions, and thereby reduce the perception of risk. And this lets us do something far more critical: start to build trust with our audience.

Establish Trust and Overcome Skepticism

CHAPTER

6



CHAPTER 6

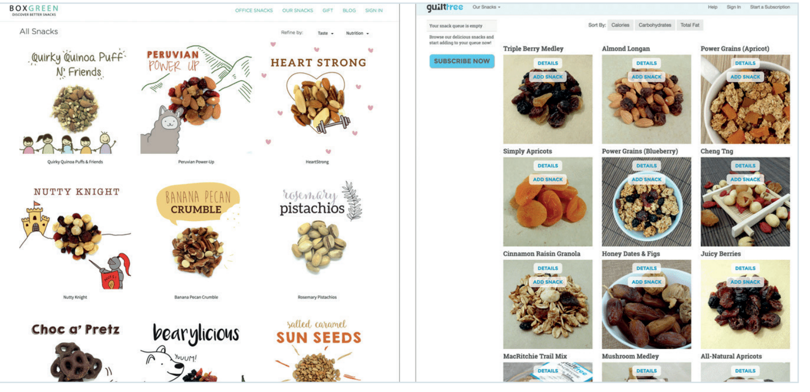
Establish Trust and Overcome Skepticism

Have you ever met somebody who instantly gives you the creeps, even before they open their mouth? Alternatively, have you met somebody who seems immediately trustworthy, although you barely know them? If you have, and most of us will have, you have experienced the halo effect.

The halo effect describes how people tend to make judgements about others based on unrelated factors. For example, we often conclude that somebody is trustworthy or creepy based on their physical appearance.

The halo effect is not limited to people. In August 2011, the Wall Street Journal featured an article that described how the “cool” persona of Steve Jobs had a positive impact on the sales of Apple. The article went on to cite the significant increase in sales of the Mac when the iPod became popular. People presumed that because the iPod was good, the Mac would be too.

If the halo effect applies to people and businesses, it is hardly surprising it also applies to your website. People are more than willing to make judgements about your company just by glancing at your site.



When the Nielsen Group tested these two sites with users, they found that people overwhelmingly favoured the website on the left despite the pricing and products being similar. The design swayed their purchasing decision.

These judgements can either paint our products and services in a good or bad light. Unfortunately, I believe that increasingly users are not approaching our websites with an open mind. Instead they come to our sites with a natural skepticism, born out of numerous bad online experiences.

These observations on my part seem to be supported by others. According to HubSpot research,[18] only 3% of people trust sales-people and marketers, while as far back as 1999, usability expert Jacob Nielsen wrote:[19]

> *The Web is turning into a low-trust society, hurting the honest sites.*

18 https://smashed.by/salespeople
19 https://smashed.by/trustworthiness

The reason this is so problematic is that trust is the cornerstone of encouraging people to take action. Rarely will organizations or individuals make a purchase or take some other step without some degree of trust in the other party. As Zig Ziglar, the famous American salesman, is attributed as saying:

> *If people like you, they'll listen to you. But, if they trust you, they'll do business with you.*

If people approach our site with a healthy degree of skepticism, then what can we do to prove to them that we are trustworthy? Fortunately, there are many positive steps we can take. We will begin with the most obvious – be open, honest, and transparent.

Be Open, Honest, and Transparent

In the previous chapter, I wrote about how McDonald's didn't shy away from addressing the negative rumors that swirl around its products. Well, it wasn't just McDonald's willingness to address these rumors; it was also how clear and unambiguous it was.

As I said when talking about privacy, too often what you read online sounds like lawyers have written it. Either that, or it has that unmistakable whiff of marketing spin, intended to put a positive slant on something that is blatantly not. But if you want to build trust, you have to be disarmingly honest and open.

Probably my favorite example of this is the story of photo-sharing website Flickr. In the early days, as it snowballed in popularity, Flickr suffered from continual server issues. Users were frustrated by the service often being down. Things came to a head when Flickr accidentally deleted some users' images –

permanently. As you can imagine, this led to a significant outcry and greatly reduced people's trust in the service.

Flickr had a choice to make. Should they turn to their terms and conditions to defend their liability, or adopt another approach? Fortunately, they realized that although their terms and conditions covered them legally, there was a more significant issue at stake – user's trust.

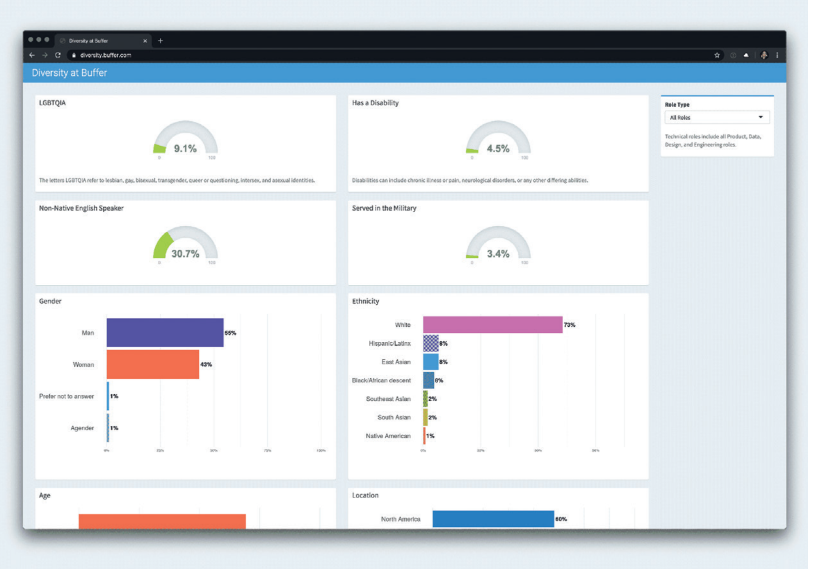
Instead of releasing a statement written by lawyers aimed at covering their liability, they posted to their blog an article titled 'Sometimes We Suck'.[20] The post was a sincere and compelling apology. It did not attempt to sugarcoat what had happened or to make excuses. It laid out what went wrong, took full responsibility, and outlined the steps being taken to avoid it happening again. They were open, honest, and transparent.

As one of the affected users, I can tell you from personal experience that the blog post went a long way in rebuilding my trust in the company, and I was not alone. Flickr turned me and others from prominent detractors into advocates for the brand. They went on to massive success before eventually selling to Yahoo! for $22 million.

This disarming openness has grown in popularity, especially among tech startups. Other examples include social media platform Buffer and content management platform Ghost. Both companies are run with a staggering degree of openness. They publish all revenue and costs in real-time on their websites. Buffer even publishes the salaries of its employees and the diversity of its staff.

I am not proposing that your company embraces the degree of openness adopted by Buffer. Indeed, this extreme will feel alien

20 https://smashed.by/flickr

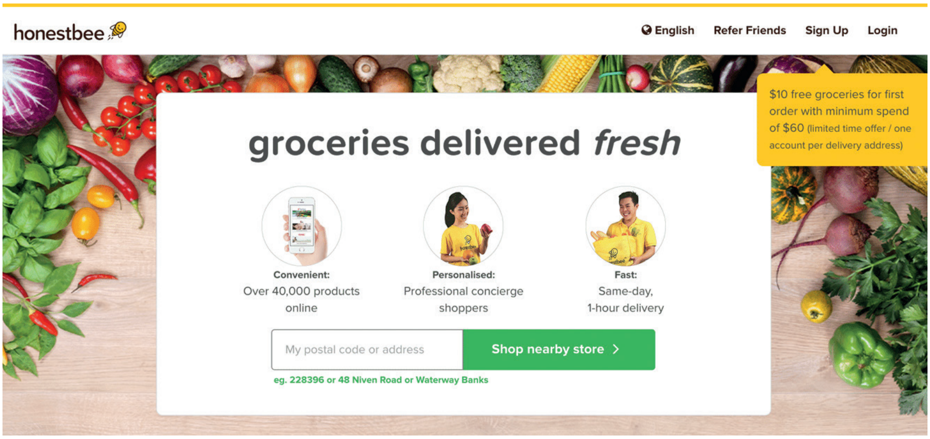


Buffer publishes a staggering degree of information on company operations, so building the trust of users in the company.

to many organizations who would be concerned about privacy and competitive advantage. I am merely attempting to demonstrate that the words we use and the degree to which we are open and honest will influence how trustworthy others see you as. It is tough to distrust a company like Buffer when I can see exactly how much the CEO earns, or the amount of revenue it makes from me as a customer.

Buffer had the advantage of adopting this approach from day one. In other companies, this is a journey that will happen over years. A good starting point is to be more explicit about what you are doing and why. Explain why you are asking for a piece of particular information or what you intend to do with users' data.

Avoid surprises too. Nothing will undermine trust more than springing a delivery charge on a customer or hiding the fact that you need them to complete a time-consuming task. The secret is to take small steps to open up and measure both the positive and negative impacts it has on the business. In many cases, people massively underestimate the benefits and overestimate the risks.



In usability testing on the Honestbee website, users were skeptical about why they needed to enter a postcode before viewing content. The site failed to explain its intent.

By way of example, for years I second-guessed everything I shared online. I was concerned that if I gave away my "secrets" in books like this, it would damage my business. Not only would it allow competitors to compete better, I was also effectively teaching prospective clients how to do the job without me! As it turned out, these fears never materialized. The more I shared, the more I built my credibility and trust in the eyes of my target audience. The result was more, not fewer sales and competitors who were always playing catch-up.

And in Flickr's case, it was not just honesty that resonated with users and built trust; it was also the company's humanity and empathy.

Demonstrate Humanity and Empathy

The post from Flickr acknowledged the frustration caused to users. What is more, it read like a human being, rather than a lawyer, had written it! These are crucial factors in building the kind of trust that makes people feel comfortable to take action.

For a start, people have to feel that your organization understands them. That is why user research is so important. Our copy needs to take the time to show we can empathize with their pain points, and that we understand what they are trying to achieve. Too often, we are so keen to push our products or services that we do not bother to build a rapport first.

But rapport isn't established just by demonstrating an understanding of the user. We need to develop a human connection, and that means we need to show some humanity! Something horrifying happens when ordinary, everyday people sit down to write copy for their website. They turn into corporate robots that seem to speak an entirely different language. Gone is the personal, friendly tone people use in conversation. In its place, people start writing boring, unengaging copy that does nothing to build trust.

By way of example, here is some copy I found on a university website:

> *As well as ensuring students make the most of their potential through their academic studies, the University of Essex also provides an environment which caters for all of the needs of its students through offering a range of accommodation, catering facilities, and active students' union, sports and the arts.*

Setting aside for a moment that this is a single long sentence, the tone of voice fails to engage the reader personally. By referring to "students" instead of "you" and the "University of Essex" rather than "we," it actively puts up a barrier between the reader and writer. That does nothing to build trust.

By rewriting, the copy has a more accessible, friendly, and relaxed tone.

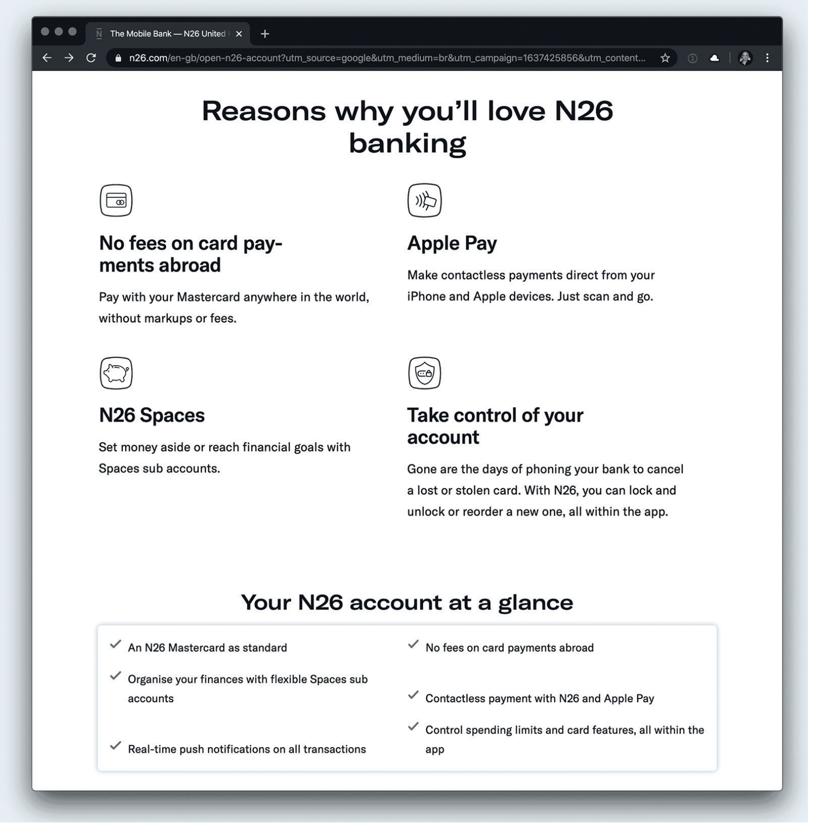
> *Student life is about more than just studying. We support you with everything you are looking for: from accommodation and catering through to an active students' union, excellent sports facilities and an engaging arts programme.*

Not only is that far more engaging, it is also considerably shorter!

Why people write like corporate automatons is a mystery to me. I suspect it is born of a desire to impress and to sound more official. What it actually does is drive a wedge between you and the reader. It alienates, rather than builds trust. My advice is to try to write as you speak. Of course, that is easier said than done and we don't always realize that we have fallen into corporate speak. The way I test my copy is to imagine I am sitting in a coffee shop with a friend. I then imagine myself saying the text I have just written out loud to that friend. If I cannot imagine doing that as part of a normal conversation, then I have lost my way.

The results that can come from adopting a more approachable and human tone are staggering. A new generation of companies are doing this, alongside other tactics to disrupt well-established sectors. Companies like N26 and Monzo, whose transparent, honest, and human approach to banking has enabled them to disrupt the sector.

Not that copy is the only way we can bring a human side to our sites. Images, video, and audio also play a part. And they can also be just as bad at undermining trust when used poorly.Those stock photographs of happy people that adorn many websites: yes, smiles do prime people into associating positive emotions with your product and services. But that only works if users interpret the images as sincere, something few stock photos achieve. Instead, these photographs come across as disingenuous and superficial at best, downright manipulative at worst. In either case, they undermine trust.



A new breed of banks is sweeping away the jargon and complexity, by speaking to customers in a tone of voice they can relate to.

The other typical example of this is the image of a customer service representative who often appears alongside phone numbers or live chat. Almost always, this is an attractive, smiling, younger woman eagerly waiting to hear from you. Why not show a photo of the real person? Sure, they might not be as photogenic (and you would need their cooperation and consent!), but at least it will be genuine and add a real human face to your business.

Imagery and video have incredible potential to help build trust if they are used to show real people within your organization. They have even more potential when they include customers because social proof is a powerful tool for building trust.

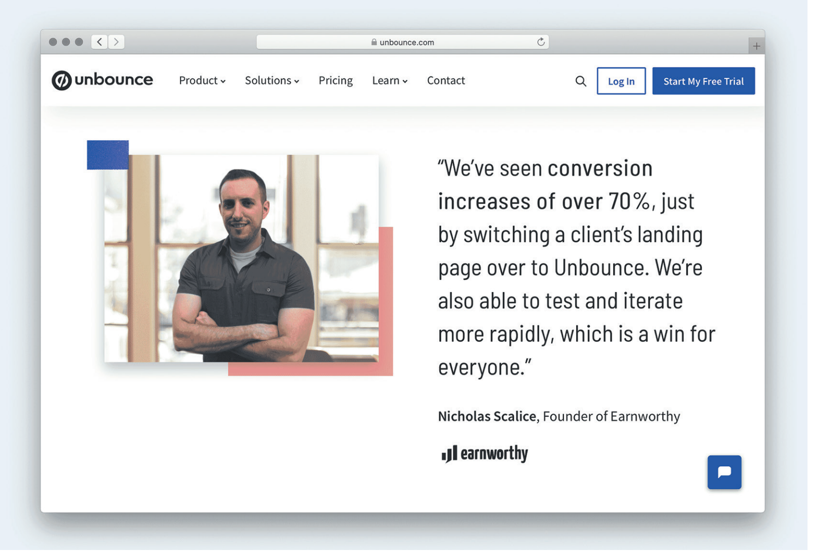
Using Social Proof

Social proof is a psychological characteristic that influences our behavior to match the behavior of others, on the presumption that the actions of others are correct in any given situation. In other words, we tend to copy other people's behavior, especially when we are unsure how to respond.

Social proof is a technique that has been used by marketers for years – and with good reason. People will often pay a premium for a product or service if enough others favor that more expensive option.

Most e-commerce websites make extensive use of social proof in the form of ratings and reviews. Chances are that if you ever purchased from Amazon, you took a moment to read the reviews by other users. However, you were probably less likely to read the manufacturer's description. You naturally favored the opinions of strangers over the manufacturer, perhaps because you feel they will be more objective or truthful.

There are many more opportunities to take advantage of social proof beyond ratings and reviews. Testimonials can be compelling: somebody actively endorsing your product or service will encourage others to follow suit.



Unbounce is just one example of a company that makes excellent use of testimonials to add to its trustworthiness.

But not all testimonials are of equal value. We favor testimonials from those in a similar position to ourselves, and put even more emphasis on the opinions of those we perceive as experts in a related field. Interestingly, when making a decision, we also sometimes favor the opinions of people we wish to emulate. Because we want to be like them, subconsciously we seek to mirror their behavior, and that is why celebrity endorsements are often desirable.

In a sense, experts and celebrities are those authority figures I referred to earlier. Another example of this kind of authority is certification. If a particular organization endorses a website, then that can go a long way in establishing credibility and trust, principal components in conversion. Of course, this kind of endorsement works much better if the user is familiar with the certification body, expert, or celebrity because most users have a healthy skepticism when it comes to social proof.

Many users are suspicious of the credibility of any testimonial or review. I'm sure you have felt the same when reading reviews on Amazon. How, then, do we prove to users that the social proof we are providing is genuine?

USE A KNOWN SOURCE

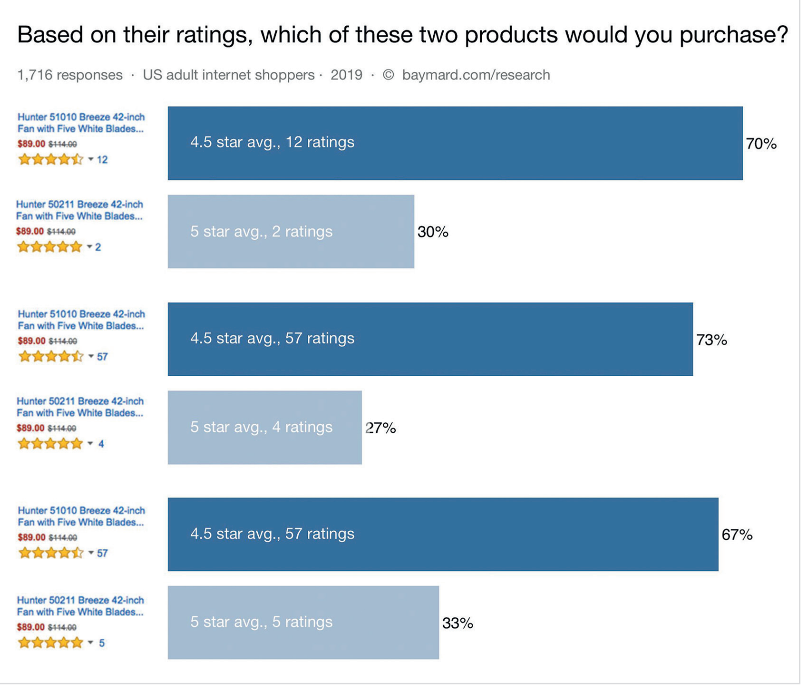
Ensuring the user has heard of the source of any social proof is a good starting point. It is even possible in some situations to include endorsements from the user's friends. For example, you can highlight if the user's friends on social media have liked your product or service.

People naturally favor sources they know or trust. Of course, that is no guarantee that the product or service is of high quality. However, because the user has more insights into the person or company, they can make a more informed judgement about the motivations behind the testimonial.

RELY ON NUMBERS

Failing that, it is possible to fall back on numbers. That is an advantage Amazon can offer. According to research carried out by the Baymard Institute,[21] people tend to trust large numbers of reviews over a handful, as any fake reviews would be crowded out and lost in the noise. That is why it is so important to show the number of reviews.

21 https://smashed.by/ratings



Baymard's findings showed that people favored a lower rating when supported by more reviews.

But that doesn't mean we need to be Amazon to adopt this approach. Simply mentioning the number of people who use your product and service can be influential.

By mentioning both third-party recognition and the number of people who voted, Tesla makes good use of social proof.

DON'T REMOVE NEGATIVE REVIEWS

That said, we tend to be suspicious if all reviews are glowingly positive. Be sure to include less complimentary comments. Their presence reinforces the authenticity of the positive ones.

USE SOCIAL MEDIA

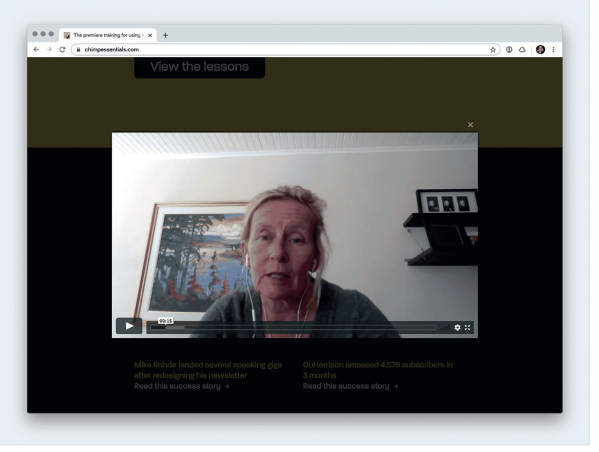
Using testimonials from social media works particularly well because you can link back to the source. That affords the more skeptical user the opportunity to check out the reviewer's social media profile and prove to themselves they are a real person.

USING AUTHENTIC VIDEO AND PHOTOGRAPHY

Video testimonials are also compelling. If possible, at least include a photograph of the person providing the review. Being able to see the person giving the testimony adds credibility in the minds of many users.

However, make sure any photographs or video used are of real customers. When using video, ensure customers are speaking in a personal and unscripted way. From what I have observed in testing with users over the years, people have become very good at spotting fake video and photographs. There is something to be said for not making your photography and video look too professional. Professionally shot video and photography can look staged and, therefore, insincere. Instead, keep it authentic even if that means compromising the quality slightly.

I am a big fan of video testimonials. They provide the opportunity for the customer to tell their story – and stories are a powerful way of making a connection that builds trust.



The testimonials found on Paul Jarvis's Chimp Essentials landing page are clearly not staged or scripted.

Tell a Story

Stories are compelling for two reasons. First, evolution has programmed us to pay attention to stories. When somebody survived an animal attack in prehistoric times, the person who paid attention to their account of the attack was in a better position to survive themselves. Second, stories trigger our ability to empathize. When we hear one, we imagine ourselves in the story. In a sense, we experience their experience ourselves.

These are both characteristics that help build rapport with users. A story will get their attention, but it will also help people to imagine themselves using your product or service. However, our use of storytelling does not have to be limited to customer stories. We can also tell the story of our own companies or products.

Don't get me wrong. I am not suggesting you write a book about your company's history. Nobody wants to read that. But short anecdotes about a company's origins or the inspiration for a product often help to humanize the brand and build a rapport that results in trust. Being able to imagine Steve Jobs and Steve Wozniak starting Apple from a plain old suburban garage softens the corporate monster Apple is today.

Not that we can only tell the story of the company's history or even its products. It is also good to profile some of your employees if you are seeking to build trust. I can give you an example of how this technique helped restore my faith in Microsoft.

For years I had an extreme dislike of Microsoft. As somebody passionate about web standards, I was not too fond of Internet Explorer 6 and its dominance of the browser market back in the day. Years went by without an update for this out-of-date browser, and it was holding back the adoption of CSS. Many other developers were becoming increasingly vitriolic in their attacks on the company.

Then, out of nowhere, Microsoft launched a developer blog called Channel 9. Developers ran this blog within Microsoft and, alongside useful advice, it also gave me glimpses into life within the organization and the people behind the brand. Suddenly it was much harder to remain antagonistic about the organization because I began to realize there were human beings behind that corporate facade. By telling their stories and describing the challenges they faced, you began to empathize and sympathize with them. They began to build rapport and trust by being open and accessible.

I would encourage you to look for stories within your organization. Maybe it is the story of how the idea for your product came about. Perhaps it is about how you worked with a past customer. Consider telling the story of a member of staff who went above and beyond in their job.

As part of our online marketing efforts for another frozen food company, we started recording short video interviews with various members of the company. We began with the obvious candidates like the CEO or the chef who created the frozen meal recipes that the company sold. However, over time we started to struggle to think of new people to interview. Almost out of desperation, we talked to one of the employees who packed the customer products. It turned out to be by far our most popular interview.

Aleksander had been working in the packing department for three years where he worked in minus 30 degree temperatures every day. Despite working in bitterly cold conditions, he was the most lovely, enthusiastic guy who sincerely seemed to enjoy his job! His passion and enthusiasm were so infectious that the elderly audience who bought from the company fell in love with him. For months following the interview, he would receive fan mail at the company offices thanking him for his hard work. That is the power of stories.

Of course, building trust is not just about the copy we write or the testimonials we use. Other factors come into play. Factors such as how valued our customers feel.

Appreciate That People Choose to Do Business With You

Before the era of the mass market, customers had a personal relationship with the people from whom they bought. They would often be on first-name terms with their local store owners. They knew their custom was appreciated through that in-person contact.

Today things are different. People are disconnected from the companies from which they buy and, in many cases, underappreciated. Often it feels like all the attention is given to the acquisition of new customers, rather than valuing the existing ones. Customers feel like a commodity that companies seek to acquire and then use up. Unfortunately, this view has become so pervasive, due to poor experiences that customers have, it has become people's default attitude. Even if your company does care about its customers, they won't necessarily see that. To address this problem, we need to go out of our way to demonstrate how much we value customers.

The most obvious way of doing this is financial. Offering existing customers exclusive discounts or money back will help. It will only go so far, however, and some will perceive this as a tactic to get people to buy more. Fortunately, money isn't the only way we can show our gratitude. Small tokens of appreciation can work too.

One example of this was a package I received out of the blue one day from Mailchimp, the company I used to send my email newsletters. It contained a woolly hat based on their mascot, Freddie the chimpanzee. With the hat came a note thanking me for being a customer. The fact that the gift arrived completely unsolicited and unexpectedly had a positive impact on me. Minutes later, I had taken to Twitter, posting a photo of my son wearing the hat and thanking Mailchimp. What I appreciated most wasn't the gift, but the thank-you note, not just because of the sentiment but because it was handwritten. Somebody had sat down and taken the time to write it and post it to me. That made me feel valued.

Personalizing the gift in that way makes such a difference in making people feel valued. I once went to a hotel where, on entering my room, I found a framed photograph showing holiday photos taken from my social media feed. Next to the photograph was a handwritten note wishing me a pleasant stay and hoping I will make lots of new memories. Admittedly, retelling this story makes it sound creepy. The idea of somebody trawling your social feeds looking through your photos might not appeal to everyone. However, at the time, it felt like a nice gesture that made me feel appreciated.

What approach could you adopt to make your customers feel appreciated? Pay attention to your interaction with companies and individuals. What do these people and organizations do to make you feel appreciated? There are so many possibilities, and so many companies that go above and beyond to make customers feel special. Take the airline KLM, which has introduced "little acts of happiness"[22] where it seeks out customers and surprises them unexpectedly, perhaps on their birthday or simply on any random day.

Pay attention to your interaction with companies and individuals. What do these people and organizations do to make you feel appreciated?

Sometimes it comes down to common courtesy. Don't make customers wait. Value their time. Where possible, give customers a personal contact within your organization and don't reduce them to an account number. Never make a customer chase you for a response or battle with you over a complaint. Costco is an excellent example of this. It will take back nearly any return, without a limit to the purchase date or the state the product is in.

Disney trains its staff to refer to guests, especially children, by name, and they go above and beyond to share the magic of Disney with customers of all ages and create unique experiences. I remember our first visit to a Disney park as a family. There were

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so many moments where the staff made every effort to make us feel valued. The most memorable was a Disney character who persevered in engaging with my autistic son, spending a long period of time with him, even though there was a room full of other children. He made us feel like the only family in the place.

However, we shouldn't just focus on ways for us to make a connection with our customers. We should also look for ways to connect our customers to one another.

Connect Consumers to One Another

Imagine you are at a dinner party with a group of friends. One of them mentions in passing that they collect paper clips. Almost certainly (if your friends are anything like mine), that person will be immediately ridiculed for such a ridiculous pastime. No doubt the poor paper clip collector will go away and reconsider their life choices.

However, what if somebody else around the table responds by saying they also collect paper clips. The conversation will then go in a different direction, with the two paper clip collectors enthusing about their hobby and sharing experiences. It may even leave you and your other friends wondering if there is something in this collecting paper clips thing. The reason I paint this rather bizarre picture is to demonstrate the power of connecting people. Once the two paper clip collectors connected, the dynamic changed as they reinforced each other in their happy pursuit.

The same thing happens when you connect customers. One customer might be unsure about their decision to use and trust your company. But when they talk with many other customers who have made the same decision, they will feel more confident. Done right, this technique won't just give your customers confidence in you. It will also encourage others to trust you too, in precisely the same way as those two enthusiastic paper clip collectors started to influence their friends.

To see this in action, you need only to look at the early years of Apple. "Apple fanboys," as they became known, were passionate about the brand in the extreme, continually promoting it to anyone who would listen. That was in large part because of Apple's ability to create a community of Apple users who then validated one another.

The idea of connecting customers is one explored in Seth Godin's book *Tribes*. He puts it this way:

> *A tribe is a group of people connected to one another, connected to a leader, and connected to an idea. For millions of years, human beings have been part of one tribe or another. A group needs only two things to be a tribe: a shared interest and a way to communicate.*

If you can connect your tribe and unify them around a shared interest, then you have a powerful tool for building trust and encouraging word-of-mouth recommendation.

Before you start designing your landing page or next marketing campaign, ask yourself what idea you can unite your audience around. For Apple users, it was the idea of creativity and thinking different(ly). For this book, it is the concept that you don't need to resort to manipulation to encourage action. What is the rallying point for your users?

Admittedly, this is not always easy. Sometimes your product or service does not immediately lend itself to community building. However, you will be surprised.

Supporting a charity can often be a good rallying point or associating your brand with a particular activity. For example, Toms Shoes gives away a pair of shoes for every pair bought, creating a community around its charitable enterprise. Innocent takes a similar approach with its Big Knit campaign. It raises money for Age UK, a charity supporting older people, by engaging a community of knitters to produce woolly hats that you can find on their drinks. When people buy a bottle with a hat, a percentage of the sales goes to charity.

These approaches work because they bring people together around a common cause. They build connections. Cultivating this kind of tribe takes time and won't help build trust among those who haven't encountered your brand before. For them, it is first impressions that count.

Innocent built a community around knitting and supporting charity.

Design With Trustworthiness in Mind

Over the last few years, trust and authenticity have become quite scarce attributes on the web. In times when our websites and digital products often appear generic and alike, we aren't making it easy for our customers to develop a sense of genuine connection with our company's values and products. Developing trust is a long-term play, and often it's pushed aside by immediate metrics such as conversion and traffic. Yet it's important to remember that the very first experience customers have with our products defines and shapes an overall initial impression, and it's likely to damage your relationship if not done well.

A study published in the journal Behavior and Information Technology[23] indicated that a user forms an initial impression of a website in as little as 50 milliseconds! What is more, this initial impression doesn't change much after seeing the site for an extended period. Combined with the halo effect, it means that design is of vital importance. If a design doesn't establish the right first impression, it can seriously undermine how a user perceives your organization and how much they trust you.

How, then, do we create that great first impression? There are four factors we should consider:

- quality
- visual design
- calls to action
- site organization

Let's briefly break each of these down, beginning with quality.

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FOCUS ON QUALITY ASSURANCE

When it comes to trustworthiness, attention to detail matters. One participant in usability testing once said to me, after stumbling across a broken link:

> *Oh, that didn't work. I also spotted several typos earlier. They obviously aren't good at detail. If they can't even get it right on their website, it makes me nervous about hiring them.*

Typos, broken links, images not loading, JavaScript throwing errors: all undermine credibility and communicate an overall lack of attention to detail. But it is not enough for your site not to break; it also has to strike the right visual tone.

VISUAL DESIGN

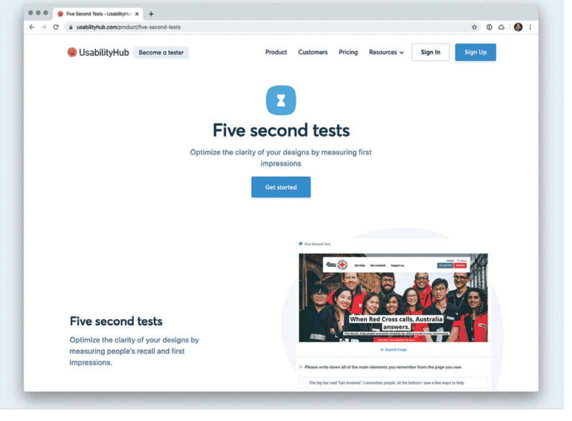
To make a good first impression, we need to meet the expectation that customers have about the design to the fullest extent, if possible. For a website to elicit trust, it should find a balance between the personality, tone, colors, typography, photography, layout, microcopy, and everything in between. It's not an easy task to do, and it needs a consistent, well-defined visual language that communicates well on your behalf.

There are thousands of books written about design, and there are hundreds of articles explaining how better design leads to better products, so let's not go deep down the rabbit hole here. To ensure that a design conveys the right impressions, we need to test it with real users – and the earlier in the product's evolution, the better. A five-second test is an excellent approach for judging the trustworthiness and professionalism of a design.

Show participants the design for five seconds and then ask them:

> *On a scale of 1–5, how trustworthy did you find the design? (Where 1 is not at all trustworthy and 5 is extremely trustworthy.)*

That will give you confidence that you are going in the right direction. If your site doesn't rate particularly well in this kind of test, one area you might also want to look at is your initial calls to action.



UsabilityHub makes it easy to run five-second tests. They will even recruit appropriate participants.

TEMPER YOUR CALLS TO ACTION

Have you ever walked into a store and been immediately jumped on by a store attendant keen to close a sale? Annoying, isn't it? It's pushy, and they leave you with the impression that they don't have your best interests at heart. Unfortunately, that is precisely what many of us do to visitors to a website. We immediately greet them with an array of calls to action, from annoying overlays to social media icons.

Take a moment to look at your homepage. Identify all the actions a user could take, from links to other pages, to forms or product selection. Now, for each element, ask yourself whether you could remove it. If you can't remove it without damaging your conversion rate, could you wait to show it to the user? Maybe that overlay could load on exit intent, or that link could appear lower on the page or even deeper in the site.

That is an approach that can be applied to all page elements and is good practice for creating a more organized site.

CLEARLY AND CONSISTENTLY ORGANIZE YOUR SITE

A confusing and inconsistent site will significantly reduce perceived trustworthiness. That is especially true when the website does not match the user's mental model. They are left with the impression that the organization doesn't understand them or their needs.

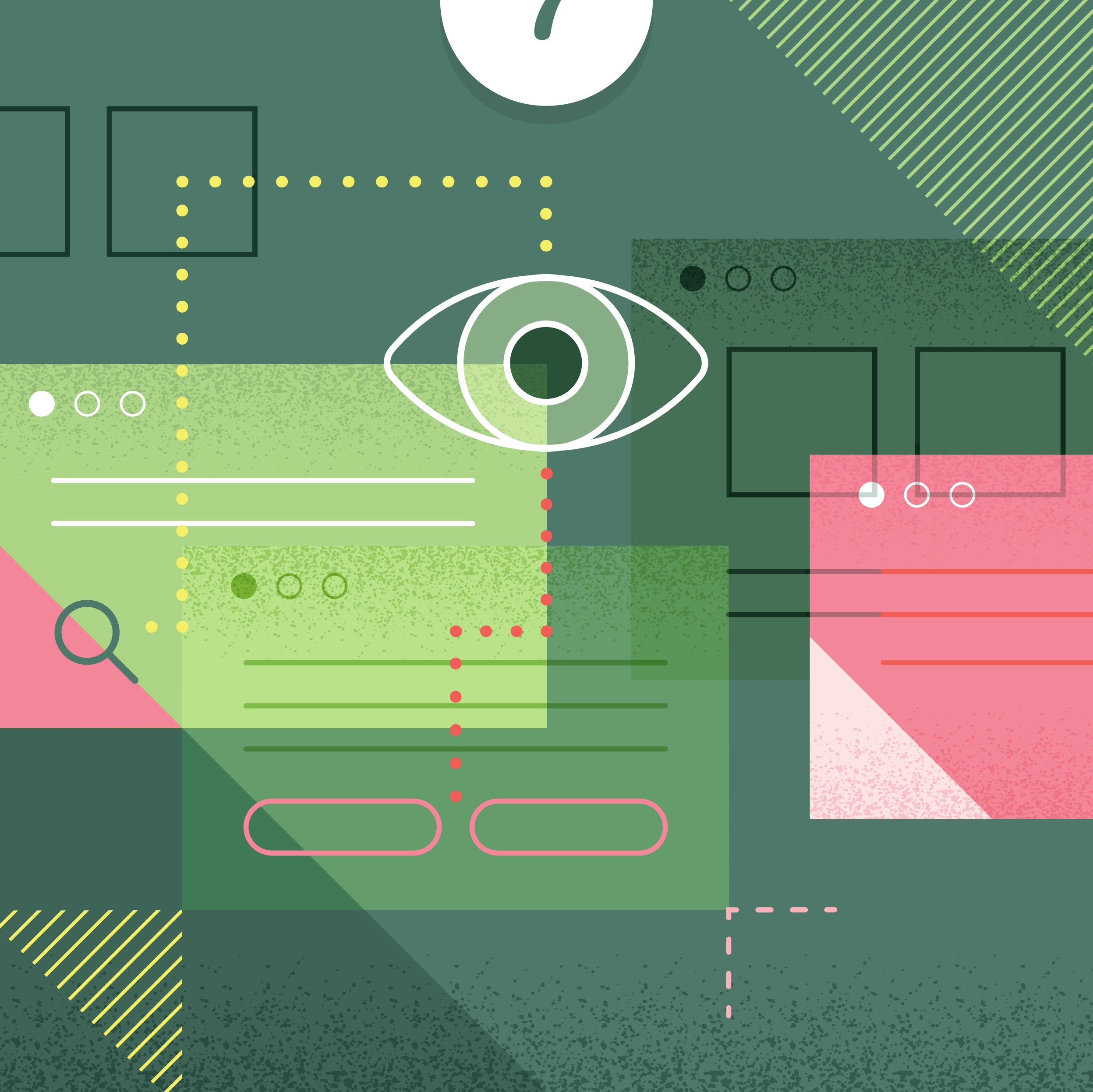
Design inconsistencies can also feel disconcerting and make users feel uncomfortable. That can stem from stylistic differences such as fonts or color. However, the bigger problem is inconsistencies in layout and behavior, where the interface behaves in unexpected ways. Hard-to-use websites can have a significant impact on how trustworthy we consider a company. If the site is hard to use, this increases cognitive load, which routinely affects how trusting we are. To oversimplify things, the more we have to think, the more cynical and untrusting we become.

With that in mind, let's take a closer look at the cognitive load of users and its broader role in influencing a user's decision to act.

Defeat Cognitive Load

CHAPTER

7



CHAPTER 7

Defeat Cognitive Load

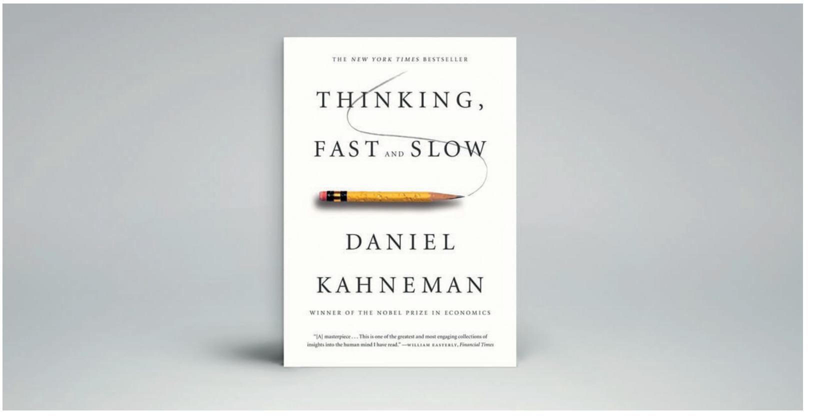
I vividly remember when I learned to drive. I couldn't understand how anybody could manage it. There were so many things to think about simultaneously. You had to concentrate on the road while changing gear, signalling, checking mirrors, and what felt like a dozen other things. It was utterly overwhelming! And it felt awful. I was tired, frustrated, out of my depth, and in a bad mood. It was just hard work!

These days, I can arrive at a place I drive to often and have no recollection of how I got there. Not only was I not conscious of driving, but I also wasn't even aware of much of the route. It's terrifying!

The psychology behind that dramatic transition is fascinating and incredibly relevant to those of us trying to create easy-to-use websites, or seeking to improve our conversion rates. When learning to drive, I had all of those negative emotions because I was forced to think – which we do not like to do.

We Are Lazy Thinkers

In his superb book *Thinking, Fast and Slow,*[24] Daniel Kahneman introduces us to two mental processes, called System 1 and System 2.



If you are looking for a deeper dive into psychology, I highly recommend *Thinking Fast and Slow* by Daniel Kahneman.

THE INTUITIVE, INSTINCTIVE SYSTEM 1

Most of us associate System 1 with unconscious thinking. The kind of thinking that is fast and automatic. It is autonomous and efficient, requiring little energy or attention. System 1 is used to recall a fact, like the capital of France or the answer to 2 + 2. It also allows you to make instinctual decisions based on very little information, and form opinions, like the trustworthiness of somebody you meet or whether you can safely overtake in a car. At face value, System 1 appears to have superpowers, but it is prone to error and becomes quickly overwhelmed, forcing System 2 to engage.

What this teaches us is that we should not overwhelm people with information to persuade them to act. The tendency to add more and more information to our sites in an attempt to convince

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does not help. Too much information is likely to overwhelm System 1, and that will wake System 2.

DELIBERATE, ANALYTICAL, AND LOGICAL SYSTEM 2

System 2 is what you would probably describe as your conscious mind. Although much slower than System 1, it is much less likely to make mistakes. It is more deliberate and analytical, enabling us to address more complex questions such as 28 × 6 or learning a new skill. The drawbacks of System 2 are that it is slow and takes considerable energy when compared to System 1.

That is why our brains always seek to move as much as possible across to System 1. In an attempt to conserve energy, we prefer to use System 1. Put another way, we don't like to think unless we have to!

That is why learning to drive is initially so painful. System 2 is forced to take control, and so we struggle to deal with the enormous amounts of input and associated decisions. However, quickly we move that work from System 2 to System 1, and suddenly driving becomes effortless.

We see the same happening with websites we use frequently, and it's why sites like Amazon feel so intuitive. We have used them so much we can use them without waking System 2.

Although Amazon has changed its site over the years, it has done so incrementally to not overwhelm existing customers.

It is also why regular users of a site go into meltdown every time its owner changes it. Suddenly they can no longer rely on System 1 to use the site. It is the website equivalent of replacing all of the controls in a car – and that raises our cognitive load.

The Devastating Impact of Cognitive Load

System 1 is not capable of doing many of the things we need to do on a website, while System 2 is a limited resource that gets depleted. Psychologists refer to this as cognitive load, which refers to the amount of mental effort a person is exerting at any one time. The higher our cognitive load, the harder our System 2 is having to work. It is a significant contributor to users abandoning sites without completing calls to action.

The reason a high cognitive load is bad for us is that it will have all kinds of impacts on the likelihood that a user will take action. People under high levels of cognitive load are:

- more likely to miss things (such as calls to action)
- more distrustful of what they are engaging with
- more likely to become frustrated and give up on the task entirely or go elsewhere

Remember, people don't like to think, and cognitive load is the definition of thinking!

It is possible at this point that you are feeling superbly confident in your website. You might feel sure that the experience is as clean, intuitive, and straightforward as possible. If so, then good for you. You have almost certainly put a lot of work into getting it to that state. Unfortunately, however, it probably isn't quite as simple to use as you hope.

The problem is that what appears simple to you isn't necessarily for your users. You have looked at your website a thousand times, and so it is intuitive in your eyes. But that is for the same reason that driving is easy when you have been driving for years. You navigate your website intuitively relying mostly on System 1. Sadly, your users aren't as experienced, and so you cannot rely on your assessment of your site.

Perhaps you have carried out usability testing that has proved to you that your website is easy to use. Regrettably, even this can be misleading sometimes. Most usability testing is not a fair reflection of the real world.

During usability testing, a user is often in a quiet environment free from distractions, and they are being paid to give a site their full attention. At the very least, they give the site more attention than they usually would because they are being observed and asked questions.

Most usability testing is not a fair reflection of the real world. During usability testing, a user is often in a quiet environment free from distractions, and they are being paid to give a site their full attention.

The real world is a different place. From crying babies, noisy train stations, limited time, and too many options, our cognitive load is often already high when we visit a website. That makes our tolerance for even minor barriers extremely low. That is why, whenever possible, it is good to test with people in a variety of situations. Grab people on the street, approach people in coffee shops, or even arrange to visit people in their homes and places of work.

Increasingly we are interacting with websites in environments that mean we already have a high cognitive load. Usability testing often does not reflect this.

Then there are the accessibility considerations that can also increase cognitive load. People with a cognitive disability like dyslexia will experience a higher cognitive burden on a website. Even those with a physical disability like a broken arm or poor eyesight will probably experience higher cognitive load too as they struggle to manage that impairment. How do we avoid adding to our user's cognitive load? One first step is not to destroy the experience of users who are already familiar with our sites.

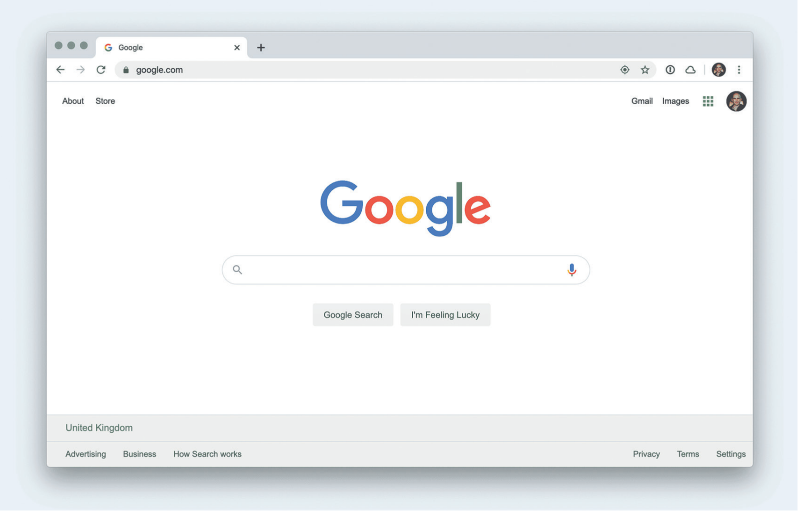
Do Not Make Life Harder for Regular Users

Our System 1 relies on something called *procedural memory*. When that procedure no longer works, because things have changed, we are forced to engage System 2. That, in turn, leads to much negative emotion that can undermine conversion.

To give you an example of procedural memory, ask yourself how you would search on a website. Chances are you would come up with something like this:

1. Look in the top-right corner of a site.
2. Click on the input box you find there.
3. Enter your search term.
4. Click the submit button next to the input field.

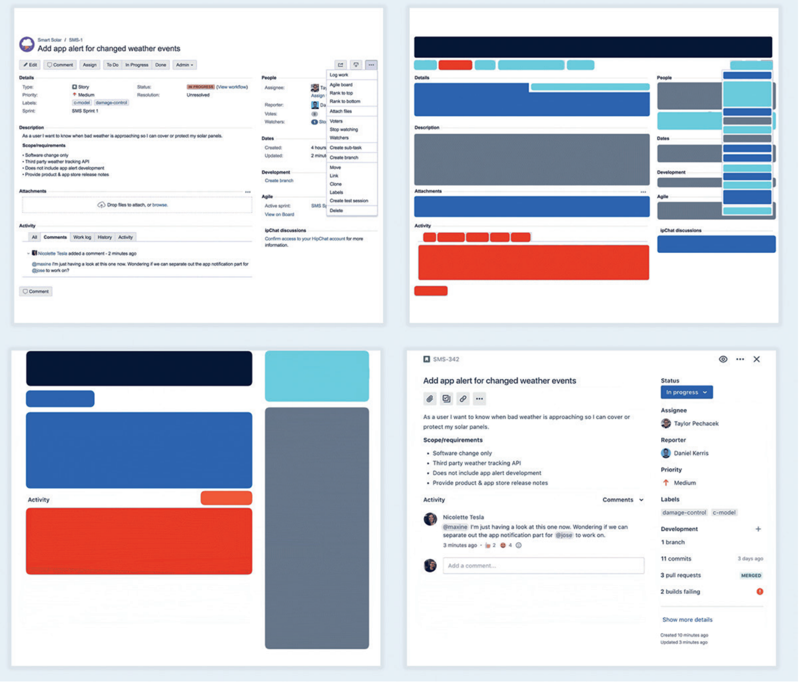
However, the moment the site deviates from the procedure – by moving the input box or removing the button, perhaps – our procedural memory lets us down, and we have to rely on System 2.



Although not strictly necessary, Google keeps its search button because it knows many users' procedural knowledge relies on it.

That is why carrying out site redesigns can be dangerous. When you start changing things on your site, there is a possibility that you will break the procedures your repeat users have for interacting with the website. That almost always results in complaints and a short-term decline in sales.

Notice I say in the short term. People will adjust to the new site given time, just like somebody learning to drive. But not all customers will persevere, and the short-term negativity can often be disconcerting to stakeholders. If you are going to redesign, I recommend warning colleagues about the short-term impact and attempt to minimize changes that could disturb procedural knowledge as much as possible. In other words, avoid moving elements around too much and be careful to clearly explain to users what has changed and how.



Jira used animation to show users how functionality moved when they redesigned their application.

For example, you might want to consider an onboarding overlay to show how you have repositioned functionality in the interface. Alternatively, you could take a leaf from Jira's book: they used an animated GIF when they redesigned their software to show users how screen elements had moved.

Finally, you could allow users to switch back to the old design, at least for a while.

Of course, we are not only forced to engage System 2 because a website breaks our procedural knowledge. If the actions a user is being asked to make are complicated, we are also forced to put more thought into it. Remarkably, even in such situations we often try to rely on System 1, rather than putting in the extra effort to think things through!

Simplify the Decision So Your Users Don't

Instead of waking System 2, sometimes System 1 will substitute a challenging decision requiring careful thought with a simpler one that needs only a simple answer. Instead of asking ourselves, "Is this website trustworthy?" we ask, "Does this website work like other trustworthy websites I have used?"

That is one reason why it is so hard to diet. Counting calories is hard and requires System 2 to be fully engaged. Instead. System 1 simplifies the question of "Which food would be most healthy to eat right now?" for a question like "Am I hungry?" or "Do I like this food?"

Of course, most of the choices we want people to make on our sites are complex – decisions about making a purchase or signing up for a newsletter. Because of its tendency to avoid difficult questions, System 1 will either substitute the choice of "Sign up for a newsletter" with a more straightforward question, like "Do I like getting spam?", or it will give up entirely.

There are two things we can do to avoid this problem. First, we can simplify the question for people by emphasizing the positive benefits of signing up for the newsletter. Let's say you sell sports equipment. If you ask people to "Sign up for our newsletter," they have to weigh the pros and cons of that decision. However, if you say "Sign up to start getting fitter," System 1 can quickly answer the question, "Would I like to be fitter?"

With that in mind, we need to examine every call to action we write, from headlines to buttons. We need to ask ourselves precisely what would be involved in deciding to take that action.

Is UNICEF the most worthy charity for my donation?

Do I want to reduce the suffering of children?

Making it clear what the action will give them helps users come to a fast and intuitive decision.

If the call to action requires thought, we need to ask how users might take a shortcut in their decision to act. If that shortcut might lead users to make a choice they later regret or wouldn't have made if they had time to properly consider it, then we need to consider a substitute. In most situations, the substitution revolves around a selfish benefit that it provides the user. What does it give the user? If the call to action references a clear benefit, people are more likely to act.

If we cannot control how the question gets simplified, we can be sure to address that simplification or any other objections people might have. In other words, immediately alongside the call to action to sign up for a newsletter, we should make it clear how much the user can expect to hear from us. That way, they will not be concerned about being spammed. That goes back to chapter 5 on objection handling and managing risk.

And second, we can do more than simplify the question. We can also limit the number of options available and make each option distinct from the others.

Offer a Small Number of Distinct Options

Not long ago, I decided I needed a new laptop for when I speak at conferences. I wanted something lightweight and portable, with a long battery life. That is not the kind of decision you make using System 1. The choices available to me were overwhelming. I started my search by doing a classic example of substitution. Instead of answering the complicated question of whether a particular laptop was suitable, I substituted it with the more straightforward question: "Is it an Apple product?"

Many people buy the same brand again and again, not because it is the best, but because they know it and it doesn't require too much thought. However, even this simplification left me with too many choices. These days, Apple has an extremely complicated line up of products, and it is no longer immediately apparent what you should buy in any given situation.

Interestingly, this is similar to the place the company found itself before the return of Steve Jobs in 1997. When he returned, one of Jobs' first acts was to simplify Apple's product line up to four options: two for consumers; two for professionals. For each, there was a laptop and desktop option. That was it.

Steve Jobs simplified the decision for customers, thereby reducing the time they needed to consider their choice.

In some ways, this feels counterintuitive. Ask anybody, and they will tell you they want lots of choice. Yet too many options overwhelm us, and often we fail to make a decision. The response to too much choice is so predictable that something called Hick's law[25] can predict it to a high degree of accuracy. Hick's law shows us that the more choices we offer a user, the longer it will take for them to decide. That increases the chance they abandon the decision entirely, as has been proved by numerous psychological studies. This fact has immediate implications to those of us running e-commerce sites. Not only will it direct the number of products that e-commerce providers want to offer, but it will also affect how they categorize their products.

25 https://smashed.by/hickslaw

I often encounter e-commerce sites that offer a vast number of categories. Not only do these overwhelm users with choice, but the more categories, the more uncertainty they have about which category they should be looking under. And the more categories, the more similar those categories inevitably will be. The same is true for website navigation. The more of something there is, the narrower the distinction between each option. It is that lack of difference that makes it even harder for users to know what choice to select. That is why I found it so hard to choose an Apple device for traveling: there were too many options, and those options were similar.

Not that you need many options for those alternatives to lack a clear distinction. Take the options Amazon presents to its customers when preordering a product on the company's iOS app. There may be only two options, but they read "Pre-order This Item Today" and "Pre-order now." The distinction between these two options is not clear, and users are left wondering what they should do.

If you have more than one choice, make sure they are distinct. If they are too similar, users will not choose.

Keeping the number of choices small and distinct from one another does not just apply to navigation or e-commerce categories. It also applies to calls to action. The average website bombards users with calls to action competing for their attention. Just some of the many requests we make of users include:

- Sign up for our newsletter
- Follow us on social media
- Share this page
- Contact us
- Buy this
- Approve our privacy policy
- Read this overlay
- Complete this survey
- Install our app

The list goes on. Not only is this irritating, but it is also overwhelming. Often you have to fight your way through less than essential calls to action to do whatever it is you came to the site to do.

The number of times I have been to a website looking to buy, only to be interrupted by an overlay asking me to sign up for a newsletter. At face value, this sounds reasonable, but when you think about it, it is insanity. People want me to sign up to their newsletter so they can sell me things. To achieve this aim, they stop me from buying something to ask me to sign up! In what universe does that make sense?

I am not saying that secondary calls to action like signing up for a newsletter are unimportant. I am merely saying that we need to prioritize and make sure we do not overwhelm users with options. The problem is that we often fail to think about the experience holistically. For example, we see that many users visit our site and then leave without buying. Our solution to this problem is to ask them to sign up for the newsletter. However, we fail to consider the impact of that on other calls to action.

That is why it is so essential to understand the user's journey, which allows us to target our calls to action better. For example, we might only show a newsletter overlay on exit. That way, we know the user has already done whatever brought them to the site. Alternatively, we could promote different calls to action depending on how many times somebody has come to our website. What we shouldn't do is throw all of our calls to action at the user simultaneously and hope they pick the one that best applies. That will not happen.

However, even if we reduce the number of options users are facing, other elements can prove a distraction.

Minimize Unnecessary Noise

In 2008, Transport for London ran a cyclist awareness campaign in an attempt to lower the number of cars hitting cyclists. Part of the campaign involved a compelling cinema and online ad[26] that demonstrated how easy it was to miss something we initially consider to be blindingly evident.

The ad started by asking the viewer to take an "awareness test." They were asked to watch two teams of players passing a ball and asked to count how many times the team wearing white passed the ball. It was challenging, with many people moving about on the screen. At the end of the test, the ad asked viewers whether

26 https://smashed.by/awareness

they spotted the moonwalking bear. The video then rewound and, sure enough, there walking between the players passing a ball was a man dressed as a bear. The viewer's cognitive load was so high as they tried to count passes that they missed the bear entirely. The ad pointed out that if you could not notice a moonwalking bear, you could easily not see a cyclist.

Even something as obvious as a moonwalking bear can be missed if there is enough of a distraction.

The ad was based on psychological experiments that had been around for years to demonstrate the impact of cognitive load. It is an experiment that applies as much to us as digital professionals, as it does to drivers on the road. Every element we add to our website is like another player or another ball being passed. They all add to the viewer's cognitive load, increasing the likelihood they miss the moonwalking bear or, in our case, the critical call to action.

Of course, getting this point across to stakeholders in a project is not always easy. From their perspective, they only want to add one little thing. Where could the harm be in that? They cannot see the accumulated effect of all these little things.

To overcome this mental barrier, I often run through a little exercise with stakeholders.

Demonstrate the Importance of Simplicity to Stakeholders

The exercise often starts with showing stakeholders the cyclist awareness ad and a short conversation about how users have limited attention. Usually, this is something people accept quite readily in the abstract. However, that understanding starts to break down when applied to a specific situation. To help participants overcome that barrier, I step them through a process.

We begin by splitting the stakeholders into teams and getting them brainstorming as many screen elements as they can think of for any particular page. I encourage them to be as specific as possible. For example, instead of writing "header," write down each element in the header. This initial exercise gives all of the stakeholders a chance to express their ideas and include them for consideration. They feel listened to and engaged in the decision making. At the same time, however, it also reveals the extent of the problem: just how many items will be demanding the user's attention.

I drive that point home further using some research carried out by Microsoft.[27] This research suggests that the average web user has an attention span of about eight seconds. That means we have eight seconds to communicate our key messages. How accurate or otherwise this number is doesn't matter. More important is the principle that we have a limited time to communicate, and that is something most people accept.

27 https://smashed.by/goldfish

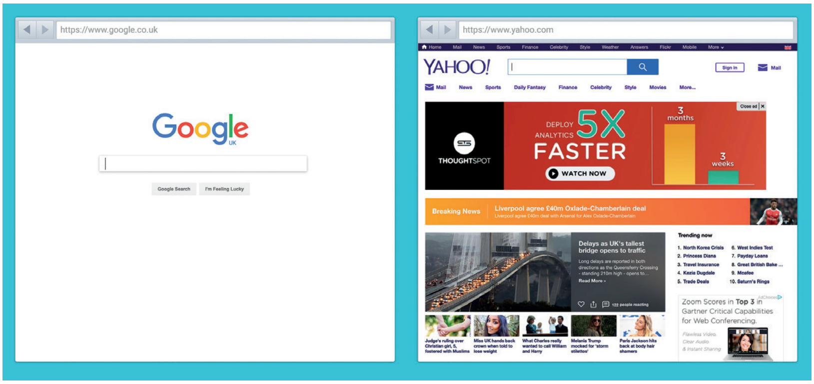
I then suggest we represent that limited attention as points. As a rough guide, I suggest that users can probably process two or three items in a second. Again, how accurate these numbers are isn't strictly relevant. That means if we have about eight seconds and they can look at about three items in a second that equates to 24 points of user attention. Each element we add to the page will take at least one point of user attention. However, if you want people to pay more attention to one element over another, then it has to be given more points. So if your privacy policy uses one point, then your primary call to action will need at least two.

Now I encourage the groups to go back through their list awarding points as they see fit. This forces them to remove some items entirely and make some tough decisions about priorities. But even this exercise won't go far enough. Inevitably the stakeholders will spread their points extremely thinly, with the vast majority of items only having one point, with the occasional sprinkling of two-point items.

To show them they haven't done enough to create a streamlined interface, I ask them to look at the Google and Yahoo! homepages. "Which provides a better search experience?" I ask. Without exception, people always pick Google.

I point out how Google has spent the vast majority of its points on its branding and search box. Yahoo!, by comparison, has spread its user attention points around the page. I then gently explain they have prioritized like Yahoo! and not Google.

For many, this is a light-bulb moment, where the theory of cognitive overload becomes a reality. Stakeholders can see the mistake they have made and the impact it causes. From there, you can repeat the exercise of assigning points, and you will find they make the tough decisions.



Google and Yahoo! perfectly demonstrate what happens when you divide users' attention.

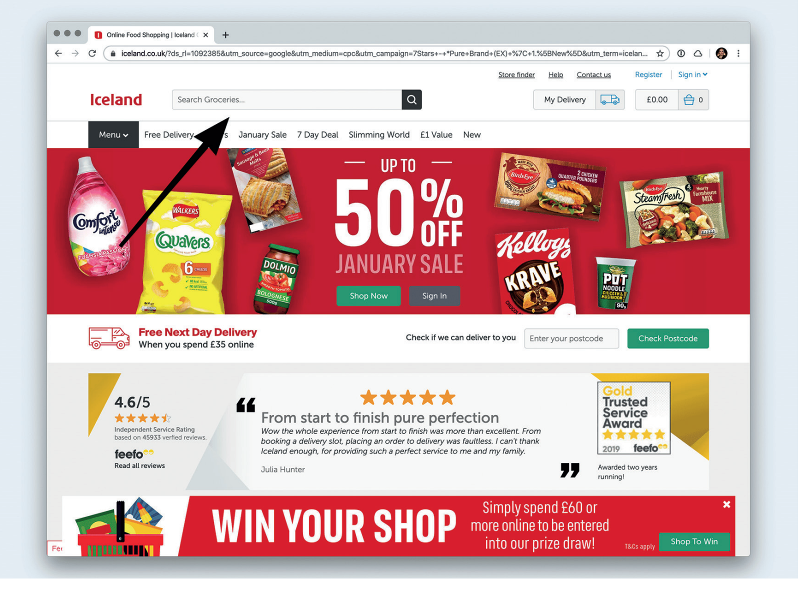
Because that is what reducing cognitive load is about. It is about making the tough decisions about what to put in front of users, knowing that every item added will slightly increase their load. I find having a mechanism for making these decisions, helps me make them with less effort and ensures the interfaces I design place the emphasis on the right things.

Adopt a Process for Simplification

The approach I use hinges on a single principle – every screen element and every piece of content has to justify its inclusion. That is in stark contrast to how most organizations approach the web. Because posting online is easy, there is the attitude of "Why not include it? Somebody might find it useful." Once you have that underlying premise, you can start reviewing your interface and assessing each screen element to judge whether it should keep its place. I achieve this by asking myself three questions, in order.

The first question is "What would happen if I remove this element?" The answer typically falls into one of several categories.

In some cases, removing an element will have a fundamental impact on the user's ability to navigate the website or get answers to their questions. Other times removing an element would lessen how compelling the site is and reduce its ability to convince the user to act.



Supermarket Iceland has a home page cluttered with offers when the primary task (search) is lost in the noise.

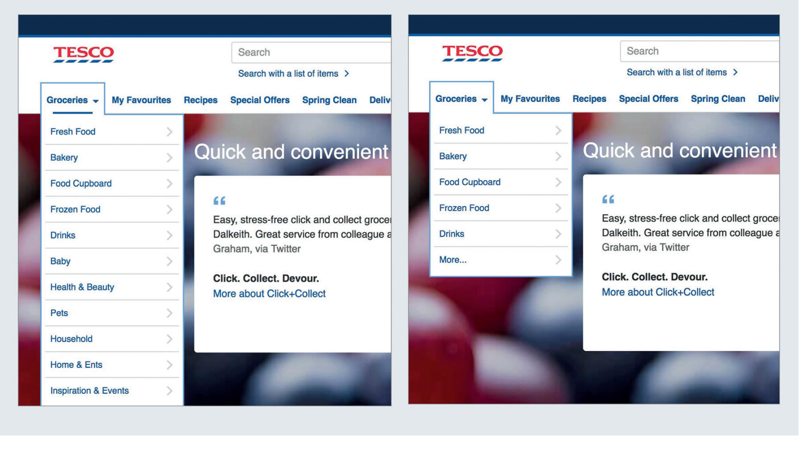
And more often than you would expect, the answer is that nothing terrible would happen if you removed the element. Alternatively, at the very least, it would have a minor impact outweighed by the cognitive load it creates. That is a judgement call, but you will be surprised how many screen elements provide nothing more than a superficial value, either in terms of aesthetics or because they include content the user only vaguely cares about.

Making that judgement call is a lot easier if you have carried out the top task analysis we discussed in chapter 5. That exercise will help you understand what information users need to know to make their decision. It will also help you see what tasks they need to complete to move forward in your sales funnel.

Then there are the elements whose removal will not change the user experience or ability to convert, but will alienate an internal stakeholder. These are the trickiest to deal with, and I won't pretend I have any magic answers. That said, data can help. If you can show through site monitoring that only a few people are looking at or interacting with those elements, then you may have a case for removing it.

However, I am not naive. I understand that sometimes you are beholden to the powers that be and are forced to include things that aren't strictly necessary. That is where you turn to question number two.

If you cannot remove an item, you need to ask yourself "Can I hide it?" What if you moved that element deeper into the site structure? What about if you put it under an accordion or tab?



If you cannot reduce the choice, at least hide less popular options.

That can prove a useful solution, not just for elements you include for political reasons, but also for secondary content; things that, although necessary for the user experience or conversion, are not crucial. Having a list of top tasks helps hugely here, as does a prioritized list of calls to action. That will give you the confidence to delay the introduction of secondary calls to action, such as following your company on social media, rather than plastering them on every page.

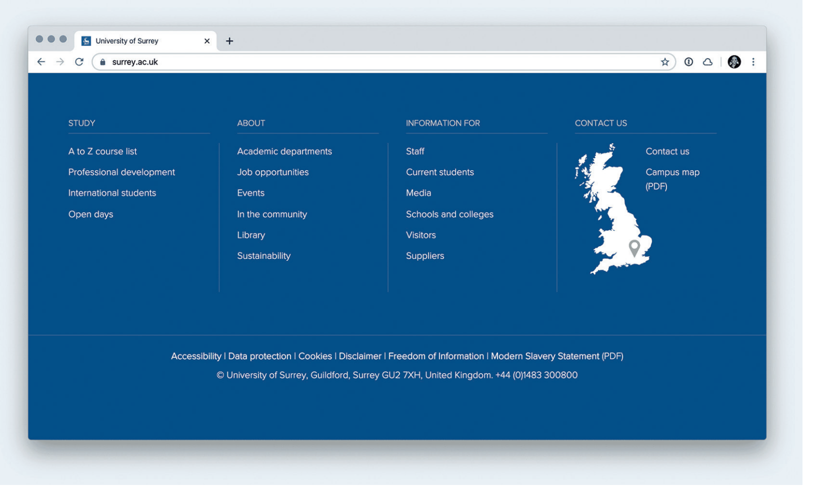
Mapping the customer journey and building an engagement funnel can all help too, especially if you do this with internal stakeholders. It helps them see that you do not encourage people to complete a secondary call to action by plastering it all over your site. Instead, timing is everything. If you can get stakeholders to grasp that picking their moment to ask users to act will be more productive, it will go a long way to reducing clutter.

Of course, hiding is going to make it harder for users to find that functionality or content. That is where you need to make a judgement call again. How many people will want access to those elements and how important is that audience to the business? Too often, I see organizations making the mistake of trying to facilitate the needs of edge cases at the cost of the majority. I am not saying you ignore secondary audiences. But they might have to work slightly harder to access their content so as not to undermine the experience of the majority.

That said, you cannot hide all secondary content. Sometimes there are legal requirements, or the decision is just not clear cut. In those cases we come to our final question, “Can we shrink its prominence?”

As the attention points exercise from earlier demonstrates, we do not want all screen elements to have the same prominence. We can guide the user's attention to some elements over others using good design. Equally, we can use design to remove emphasis from less essential items. Size and position are your two primary tools to achieve this. We can use color too, but there is a danger you undermine accessibility if you rely on it too heavily.

To reduce the chances of an element drawing attention away from more critical content, you can either make it visually smaller or put it lower on the page. The classic example of this is the kind of content you find in the footer of most websites. These simple text links are unassuming and are the last thing people see on a page.



The footer is an excellent place to display content that cannot be removed for legal or compliance reasons.

The footer is not your only option. Users judge the importance of page elements based on their prominence, which is defined by size and position. The bigger an element and the more prominent on the page, the more attention it will get. It is that simple.

Design can be a powerful tool in managing attention, which is crucial in our battle to overcome cognitive load and ensure users see the critical messaging and calls to actions.

Use Design to Focus Attention

Once you have removed or hidden all you can, the next step is to focus attention in the right place. Some ways of doing this are obvious to everybody. For example, if you want people to pay more attention to one element over another, you make it bigger. Obviously, any designer will tell you there are many other tools at our disposal than just "Make my logo bigger!"

Color is one of the more obvious choices. If you want people to spot your call to action, make it a color that contrasts with the rest of your interface. Of course, you need to be careful, as approximately 1 in 12 men, and 1 in 200 women are color-blind. So although we should use color, we need to consider accessibility if we want it to be effective.

Then there is positioning. However, this isn't as straightforward as you might think. Many people are under the impression that the higher an element is on the page, the more attention it will get. That is not necessarily so. Many other factors come into play when considering position. For a start, there are user expectations. I have already talked about how people expect to find search in the top right-hand corner of a site and that it has become a learned behavior to look there.

Then there is how people read the page. In western countries we read from top to bottom, favoring the top. However, we also read from left to right, which means we are biased towards the left-hand side of a page. A call to action in the top-right might not perform as well as a call to action placed lower in the left-hand column.

In one A/B test, I observed a 304% increase in conversions by moving the call to action into the main flow of the content even though it was lower on the page.

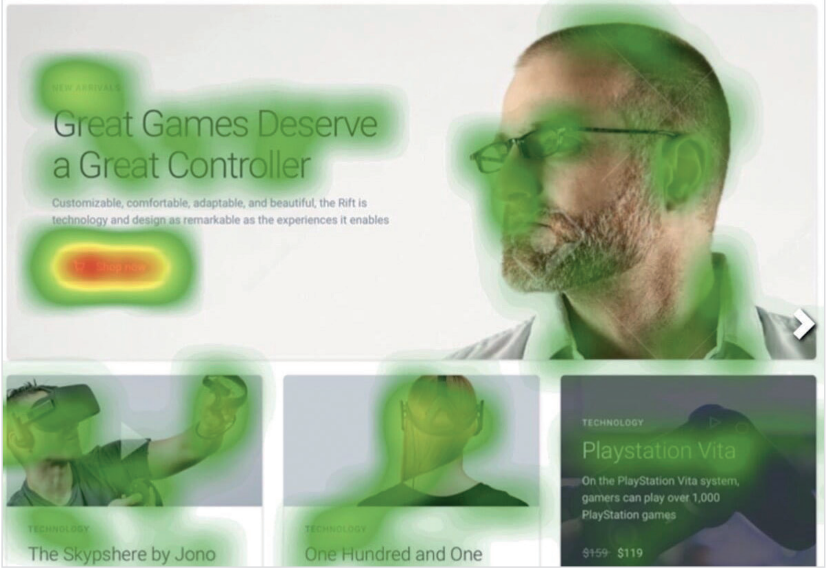
Because we usually look for and find content in the left-hand column is another contributing factor to this. We tend to focus more on in-page content than other elements, and so a call to action embedded in the flow of a document often performs better.

That kind of context matters a lot when it comes to positioning. Not only will the placement of the calls to action in the content flow matter, but so will their relationship with other screen elements. For example, the fewer elements close to the call to action, the more likely users are to spot it. That is why designers favor negative space so heavily and why you will see the smallest mark on a white wall. There is nothing else to draw the eye away.

It is easy for attention to skip over calls to action to nearby imagery.

The proximity of imagery is particularly powerful, especially when that image contains a picture of a person. Our success as a species has relied on our ability to cooperate and work together. We are therefore biologically programmed to pay a lot of attention to other people and especially their faces.

A face can either draw attention to or away from calls to action, depending on its relative position. For example, a user can miss a call to action that you place to the left of an image of a face because the user's attention skips over the call to action to focus on the picture. However, there is another factor with faces – line of sight. We tend to follow the gaze of people in photos. If the person in a photograph is looking towards a call to action, the image can help draw attention to it.



By associating images with a call to action, we help draw the user's attention.

And it is not just lines of sight that we tend to follow. Any strong indication of line or direction will also draw the eye. That means arrows or similar direction lines can be used to draw attention. Equally, a strong vertical or horizontal line can block the user's gaze from progressing.

There is one final tool we can use to focus users attention, but like imagery, it can just as easily distract. That tool is animation. As well as an evolutionary advantage to looking at faces, there is also one for paying attention to movement. As a result, any on-screen movement can grab our attention.

That can be both a good and a bad thing. Yes, animation can be used to draw attention to a call to action. However, that very same animation can increase cognitive load, especially when it repeats, always pulling attention away from other elements. For example, there is a trend towards video backgrounds which autoplay on load and play in a loop. That kind of video will almost certainly increase the user's cognitive load. That will add to the chance they abandon the site or see it as less trustworthy and irritating.

However, we can and should be using animation. It just needs to be used with care. A small, subtle animation such as a pulsing button or gradual color change can work exceptionally well as long as any animation isn't too fast. You can use stronger animations as well, but avoid them looping more than once or twice. Also, when possible, give the user control over it playing. Finally, when using animation, associate it tightly with the primary content. Do not use animation on secondary content or calls to action as this will draw attention away from more important elements.

That said, animation is a powerful tool in our toolkit. Not only does it draw attention, we can also use it to put users in a positive mindset.

Improve the User's Mood

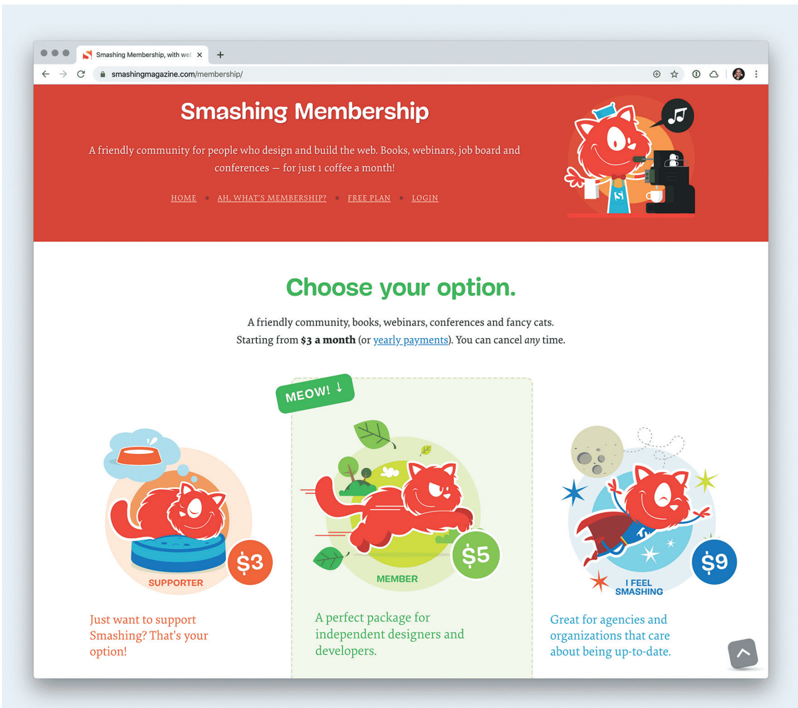
There is a direct relationship between cognitive load and mood. Not only can an increase in cognitive load put us in a more negative mindset, but a good mood can also lower our cognitive load.

We have all experienced times when we get into the zone while working. In this positive mindset, tasks that sometimes feel hard work become effortless. Equally, we have all experienced days when we have felt grumpy, and everything seems like an effort.

You may be tempted to think that we are powerless to dictate what mood the user arrives at our site in. That isn't entirely true.

There are, of course, many factors that influence a user's state of mind. However, we are certainly more than capable of making things worse with annoying emails, irritating social media posts, and other communications that prelude a visit to a site. But we can shape a person's mood in positive ways too.

I think Smashing Membership does a great job at this. Through vibrant colors, fun illustrations, subtle use of animation, and friendly copy, the site exudes positivity.



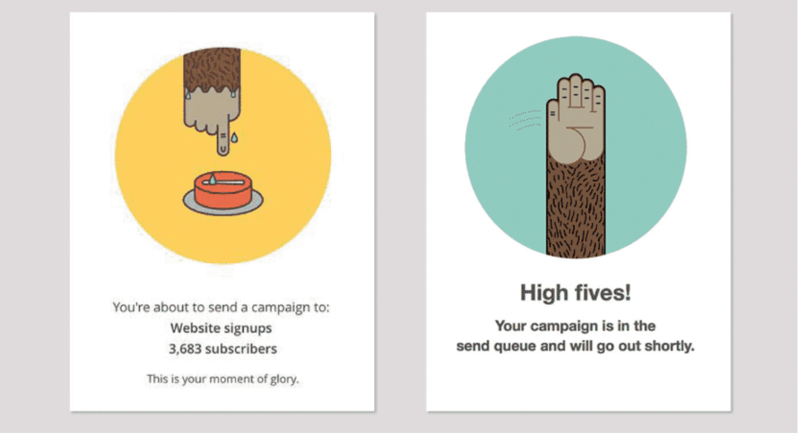
Smashing Membership does a great job at creating a positive mindset with its choice of imagery, color, and copy.

Of course, what delights me may not delight you. You might find the Smashing Membership design loud and annoying. That is why testing with your target audience is so important. Once again, a simple five-second test would work great here. Show the user the design for five seconds and ask them to rank it on criteria such as positivity, appeal, or any other keyword you are seeking to engender.

One idea of the role of design in shaping experience is part of a theory called the Kano model. Developed in the 1980s by Professor Noriaki Kano it stresses, among other characteristics, the importance of delighting people. These delightful factors are unexpected and pleasant. Sometimes they are a feature people did not expect, such as a thermometer on a package of milk showing the temperature of the milk. Often they are an unexpected design element. Most people feel a spark of delight when they first spot the bear in the Toblerone logo.

Design elements such as the hidden bear in the Toblerone logo can delight users.

Email marketing company Mailchimp does an excellent job of this. When the moment comes to send a campaign, it shows an illustration of a hand hovering over the send button. If you wait, the hand starts to shake with nerves and eventually sweat.



Mailchimp uses subtle and humorous animation to make users smile.

Once you send the email, you will see another illustration of the same hand, giving you a high five. If you click on the hand repeatedly, it will get sore, slowly turning red.

These delightful and unexpected moments make you smile and engender a positive response that helps lower your cognitive load.The effects don't last, however. Once you have seen the delighter, its impact fades, so you cannot rely on these gimmicks in the long term.

Not that our websites are the only thing that shapes mood. Customers who feel valued, as we discussed in the previous chapter, will have a more positive mindset when they come to act on our sites. All of the advice I gave about building trust also applies when creating a positive mindset.

The most effective ways of delighting customers are to show an understanding of their needs and to exceed their expectations. You may feel you do that already, but what you think ultimately doesn't matter. The question is whether your users feel like that and that all comes down to their perception.

Overcoming the Problem With Perception

CHAPTER

8

CHAPTER 8

Overcoming the Problem With Perception

A few years back, I found myself stumped by a particularly tricky problem. I was running some usability testing for a client who ran an e-commerce site. They had been doing everything right, from offering free delivery to covering the cost of returns. However, they didn't see the conversion rates they should have.

It turned out that the company operated a franchise model where different franchises were responsible for fulfilment in different parts of the country. That proved a problem because each franchise could set its own prices.

The way the company solved this on the website was to display the average price and then adjust it when the user entered their post-code. They did their best to make this clear to the user, but it caused much confusion and, not surprisingly, anger.

In the usability testing, I discovered that those who saw a price increase on entering their postcode interpreted this as a hidden delivery charge. They felt that the site lied about free delivery.

That is the problem of perception. It doesn't matter whether the user's feelings are justified or not; it will still lose you the sale. The way we overcame the issue was to reframe the user's perception of what was happening. Instead of displaying the average price, we posted the highest price by default. Then, when the user entered their postcode, the majority were offered a discounted price, which people readily accepted, without questioning why they were receiving it.

Not that implementing this solution was straightforward. Technically it was trivial. But getting management to agree to inflate the price was a hard sell. It made them look expensive compared to the competition. Fortunately, the fact that the solution was easy to implement technically worked in our favor. We were able to run a test on a small segment of our users. Although we did see a decline in people adding products to their baskets, we saw a significant decrease in the number of people abandoning their baskets before checkout. That worked out as a net gain in revenue, which was enough to win over management.

There are a few lessons to learn from this story. The first mistake the company made was giving the customer a sense of loss. We have already talked about how keenly people feel a sense of loss, and the practice of charging some users more when they entered a postcode triggered this. Users perceived the increase in price as a loss over what they initially expected to pay.

The average price also acted as a reference point that framed expectations in the minds of users.

Beware Negative Price Framing

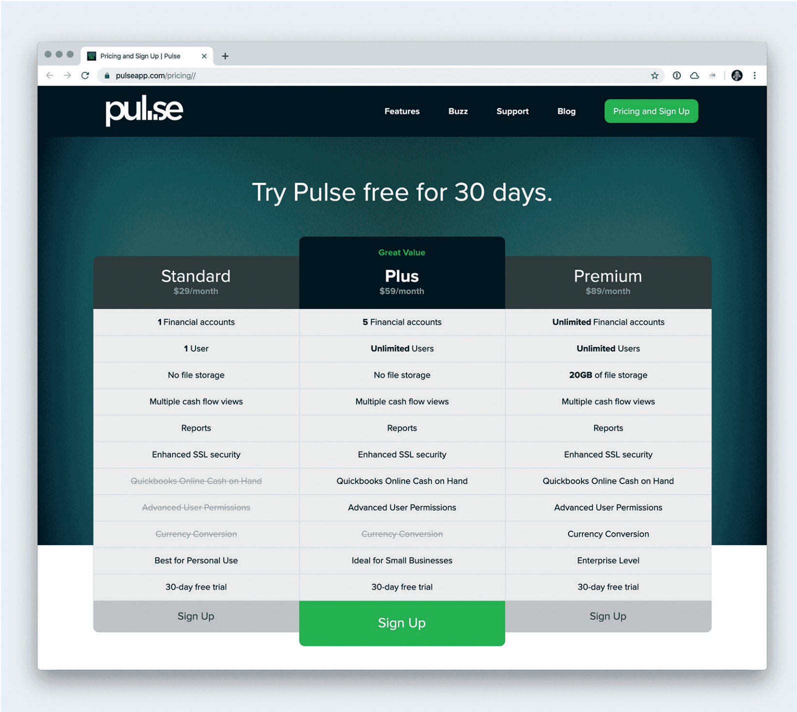
You see, nothing has an intrinsic price. Instead, what appears to be a reasonable price is defined by any number of factors, including, but not limited to comparisons with:

- the competition
- similar items
- prices paid in the past
- items with a comparable price
- availability
- the customer's available funds
- the relative intensity of need

Intentionally or unintentionally, we shape how people perceive our prices through our websites. Our content, design, and calls to action all set people's expectations. That is part of the reason some dark patterns are so successful. If you give the impression of limited availability, then the price looks cheaper.

Of course, there are ethical questions about how far you should go in altering a user' perception of the value of your products and services. For the franchise company, we believed that the average price was creating a false impression that we wanted to correct. By showing the highest price and then lowering it, we used the higher cost to reframe how users saw the final price. Suddenly it looked like a bargain.

You see this technique being used all the time on the web. It often appears in the form of a pricing table that offers three options at three price points.



A pricing table can be used to frame how a user views the value of your offering.

The cheapest option offers only the most basic features and is often extremely limiting. By contrast, the most expensive option will have every conceivable feature, but be expensive. The company does not expect cheap or expensive options to sell particularly well (if at all). They exist to make the middle option look like good value. They frame the user's perceptions of that default product.

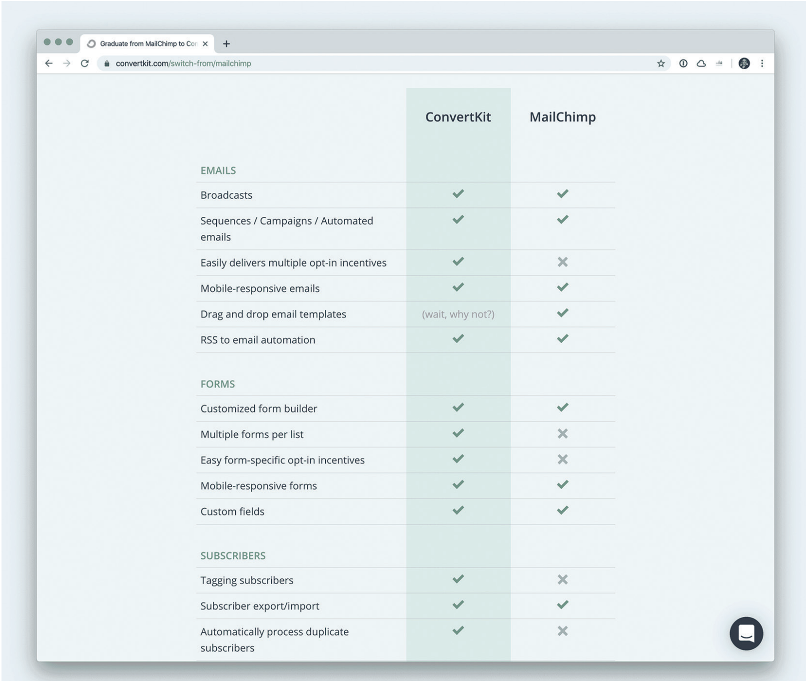
You could argue that this is somewhat manipulative and I wouldn't entirely disagree. That is especially true if the cheaper and more expensive options exist solely to sell the middle one. That said, without these options, the user is more likely to start comparing your price to the competition, and that is not always a fair comparison. Price comparison of this nature can often be extremely misleading when users are not comparing like for like. For example, there is a big difference between hiring an experienced web designer, and a student working out of their parent's bedroom. When comparing on price alone, the student looks like a much more attractive option.

The problem is that price comparison is easy, while comparing other factors is much harder, and as we know, we don't like to think. To help users overcome this problem, it is often beneficial to help users reframe their comparison to encompass factors other than price. When the user sees a higher rate in the context of other factors, it will change their perception, making the price look more reasonable.

By way of an example, take a look at ConvertKit. ConvertKit is an email marketing platform that competes with more established competitors like Mailchimp.

Not only is email marketing extremely competitive, but ConvertKit also charges more than the market leader. A direct comparison on price does not reflect favorably. To combat this problem, ConvertKit reframes the comparison away from price and towards features. They do this by showing an easy to digest table that directly compares ConvertKit's features with Mailchimp. Doing so makes ConvertKit's offering look attractive and worth the extra cost.

Of course, you might argue that criticizing a competitor in this way is unethical. I would certainly agree if the feature list were incomplete, ignoring some of Mailchimp's features that ConvertKit did not support. However, I find pointing out the benefits of your product over the competition completely acceptable. Of course, that is a call we each need to make personally.



	ConvertKit	MailChimp
EMAILS		
Broadcasts	✓	✓
Sequences / Campaigns / Automated emails	✓	✓
Easily delivers multiple opt-in incentives	✓	✕
Mobile-responsive emails	✓	✓
Drag and drop email templates	(wait, why not?)	✓
RSS to email automation	✓	✓
FORMS		
Customized form builder	✓	✓
Multiple forms per list	✓	✕
Easy form-specific opt-in incentives	✓	✕
Mobile-responsive forms	✓	✓
Custom fields	✓	✓
SUBSCRIBERS		
Tagging subscribers	✓	✕
Subscriber export/import	✓	✓
Automatically process duplicate subscribers	✓	✕

ConvertKit reframes the evaluation with Mailchimp away from price and on to features.

If you do choose to adopt this approach, the secret is to make the comparison easy for users. Our laziness in decision-making means that we will not do the work necessary to consider other factors. We don't even recognize that we might not have all that we need to make a decision. As Daniel Kahneman puts it in his book *Thinking, Fast and Slow*, "What you see is all there is."

For example, if I told you about a person called Jim and said he was quiet, studious and had fantastic attention to detail, you would almost certainly conclude he was more likely to be a librarian than a farmer.

The description fits our stereotype of a librarian. But what you are ignoring is that there are twenty times more farmers than librarians. You made the assessment purely on what you knew, and chose to ignore the fact that you might not have all the information.

Once again, the importance of simplicity is paramount. Users must have the right information in front of them at the right time to draw the correct conclusion. Otherwise, whatever is at the front of their minds at that moment will shape their perception.

Shape Perception Through Your Content Choices

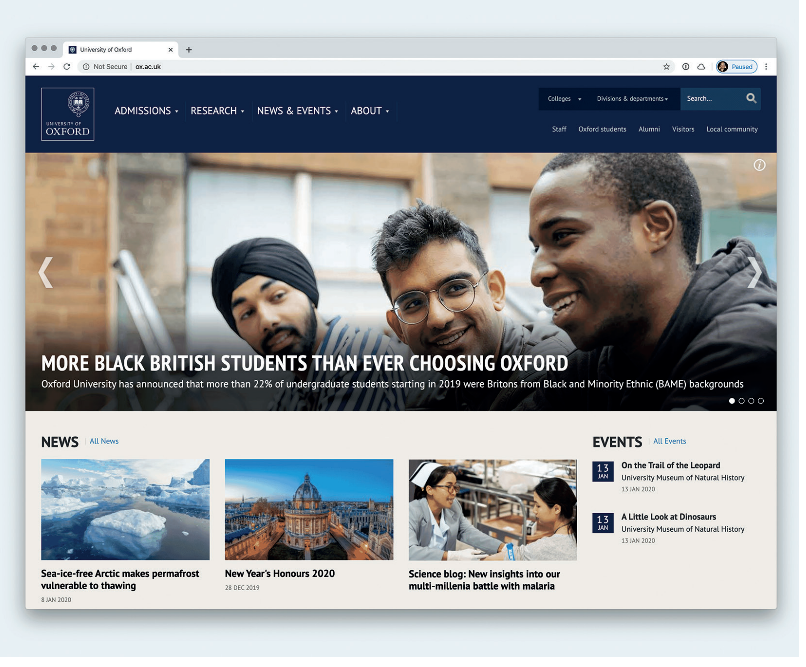
What are you putting in front of users at those critical moments in their journeys? What perception are you helping them form? Is it a positive or negative perception? Because every image and every word counts.

In my chapter on objection handling, I mentioned that spam is a common concern among users. It would make sense to add a sentence like “We will never spam you” next to a mailing list sign-up form. And you may well find a phrase like “Always useful, never spam” works better because it strikes a positive, rather than a negative tone.

Another project I worked on demonstrates how quickly users form the wrong impression based on almost no information. A high-profile UK university was keen to attract more international students, especially from Asia. Its website was a crucial component in convincing these students to apply, and so the university was keen to ensure it was as compelling as possible.

As part of a broader evaluation, I decided to run a five-second test on the home page. As the name implies, this involves showing the user a webpage for only five seconds. You then ask the user various questions about what they have seen. In our case, we asked a straightforward question: "Based on what you have seen, do you believe this is a university for people like you?"

I had a fair idea of the trend I was likely to see. However, I was still taken aback when every one of the participants said it was not. The reason for this strong adverse reaction was the large hero image on the home page. It was a photograph of the senior leadership team dressed in their academic finery. Every single one was white, middle-aged, and male. On the entire home page, there was not one person who looked anything like their Asian target audience.



The University of Oxford recognizes it needs to change how minority communities perceive it and has addressed that positively through the use of imagery and copy.

It was a classic example of "what you see is all there is." Users didn't see anybody who looked like them, and so subconsciously they concluded that the site was not for them. People need to know at a glance that your site and associated products are relevant to them. They need to see people like themselves and with just a glimpse ascertain from your copy that you are talking to them and understand their challenges. That is why I find five-second tests so useful.

A significant way to show users that your site is relevant, and by extension, your product, is to reflect the way your users think.

Reflect the User's Mental Model to Be Relevant

Unfortunately, all too often the language we speak is not the same as our customers'. Frustratingly, that is not always an easy thing to see, and what makes perfect sense to us isn't apparent to our clients.

If I were to tell you that Karen was going to visit the bank, what would you expect Karen to be doing? Most people presume that Karen would be going to withdraw some money or apply for a loan. A few humorous individuals always suggest she might be going to rob the bank. However, if you were an angler, you might think of a riverbank, rather than a financial institution. Your mental model will be different, and so your associations with the word "bank" will be different.

This idea of a mental model is an important one. Our mental model of the world is made up of associations and perceptions: our understanding of how things work and the characteristics we associate with different things. It is the reason we expected the quiet and studious person from earlier to be a librarian, or why we tend to look for a search box in the top-right. Our mental model colors our perceptions. If things do not fit our mental model, we find it disconcerting, and that causes us to feel uncomfortable and suspicious. In short, if we want to connect with people, we need to reflect their mental models.

What does this mean in practice for us, trying to create highly converting websites? Mainly it means we have to be extremely careful that we pick the right words.

CHOOSE YOUR WORDS CAREFULLY

If we use the wrong words, we are in danger of confusing users, and that will alienate them, damaging conversion.

One of the best examples of this is jargon. Although most people would agree that using jargon is terrible, we often have radically different interpretations of what jargon is because of our different mental models. When you work in a field for a long time you start to use shorthand for complicated concepts.

A great example of this might be something like *agile*. What agile means to somebody working in the digital field is radically different from somebody working outside. Unfortunately, we can often be blind to these unfamiliar terms because they are natural to us.

We often find ourselves arguing that if somebody doesn't know the term in question, they probably aren't our target audience. That is precisely the push back I got from the same university I mentioned earlier. The academics writing the copy argued that if people didn't understand it, they were not the kind of students they wanted to attract.

In truth, things aren't so black and white. There are lots of reasons why somebody might not be familiar with the language you use. They might be new to the sector or may not speak English as their first language (as in the case of the university). There are also significant differences between companies, even within the same sector. People think that the jargon they use is industry-wide, when in fact it is specific to their company.

A lot of these terms are ambiguous. If I asked ten people to define the word "agile" or "accessibility," we would probably get ten different answers. In fact, these differences are the source of much passionate debate online! All of this means the words we pick matter a lot. Users could well not understand them at all, or they may have a radically different understanding of what they mean. That applies not just to the copy we write, but also to the site structures we create.

SELECT YOUR LABELS WITH CARE

If our site structures do not match people's mental model, then you'll eventually have users giving up because they can't find what they are looking for quickly.

To demonstrate the kind of problems a failure to use the right language can create, let's return to our university example one last time. While working on that project, I was reviewing the site's information architecture. One of the top-level sections was "Alumni." Alumni is a term well known by most of those who have graduated from a university, but it is not a term that school leavers or potential undergraduates generally know.

The digital team at the university were conscious of the problems of jargon and failing to speak the language of users. However, they reasoned that including Alumni as a top-level section was OK, because anybody who fell into this category would be well aware of the term. Surely, everybody else would ignore it.

Unfortunately, in testing, this proved not to be the case. I asked several school leavers and international students to find a particular piece of information on the website. It was a piece of content whose location wasn't immediately apparent when you were looking at the top-level sections. Without fail, each user scanned the top-level sections, paused for a few seconds and then clicked on Alumni.

When I asked them why they decided to click Alumni, the answer was the same: "I didn't know what it meant, but as the other sections didn't seem right, I thought I would look in Alumni." Despite what we all expected, people didn't ignore an unfamiliar term. Instead, they resorted to it out of desperation, because the content they were looking for didn't seem to fit into any of the other sections according to their mental model.

That is the problem when we fail to match people's mental models by not using structures and language that make sense to them. It is not enough to organize our sites into sections that seem logical to us. That is because you are not rational, and neither are your users. Take, for example, where you find tomatoes in a supermarket. You wouldn't expect to see them alongside apples, bananas, or other fruits – despite the fact they are fruits. No, we expect to find them with lettuce, spring onions, and carrots, because we tend to eat them with salads. Our mental model groups them in that way, and so the supermarket reflects that.

It is not enough to organize our sites into sections that seem logical to us. That is because you are not rational, and neither are your users.

All of this might be leaving you feeling overwhelmed. How do you create content for a website when one badly chosen image or some poorly worded label can cause users to form the wrong impression? The honest answer is that you cannot – at least, not without the help of your users.

Involve Users in Content Creation

If you want to produce content that resonates with users and creates a positive perception, you need to involve users in the process. The best people to create content that connects with your audience are your users.

For me, this often begins with surveying users to find out what their questions and objections are relating to a product or service I am looking to sell. By answering those questions and concerns, I show the user that I am focused on their needs and that the product I am selling is designed with them in mind. Of course, I need to ensure that the user finds the answers they need. Otherwise, they will go away with the perception that I didn't answer them. I do this by identifying which questions they want addressing the most, using top task analysis, as we discussed in chapter 5.

I then tend to take the top 30 questions identified in the top task analysis and use these in an open card sorting exercise.

INVOLVE USERS THROUGH CARD SORTING

If you haven't run open card sorting before, don't worry; it is incredibly straightforward. All you need to do is print each of those top 30 questions onto individual cards and ask users to group them in whatever way makes sense to them. Once they have organized the questions into groups, you then ask them to label each group using one or two words. Doing this straightforward exercise will give you a sense of the user's mental model and it can form the basis of your top-level information architecture.

Once I have identified those top-level sections, I then often run a closed card sorting exercise. Once again, this involves printing each question on a card. However, this time I print all the questions out, not just the top 30. I ask the user to place all of the cards in the top-level sections you have previously agreed. That will help validate your top sections and also helps me understand what I should add where.

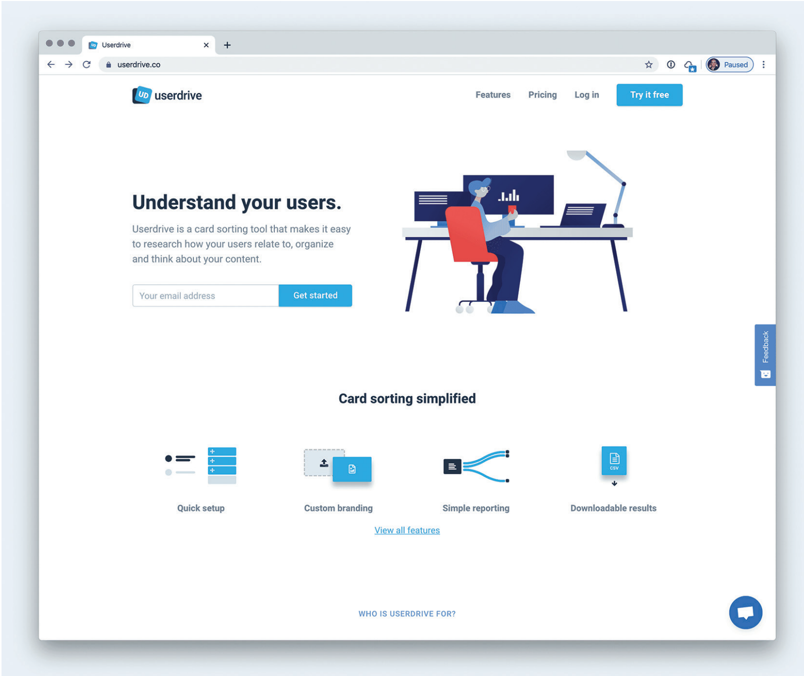
Involving users doesn't need to stop there. You can also include them in answering those questions too.

INCLUDE USERS IN THE PROCESS OF DRAFTING COPY

Gather a group of users together in a room, along with an equal number of internal stakeholders. Now pin all of the questions onto the wall. Split the group into pairs, with one user and one internal stakeholder in each pair. Next, ask each group to pick a question to answer and then draft an answer to the question together.

The answer will not be perfect or even well-written. It may contain inaccuracies or miss crucial details. But, it is a starting point for final website copy, and you can refine it later. Once they have done that, they select another question and repeat the exercise.

In a matter of a few hours, you will have a reasonable draft for the critical content on your website. Best of all, they will have written it in a tone of voice that resonates with them and answers the questions in a way that matches their mental model.



Userdrive is an excellent tool for running card sorting online.

This approach often proves a lot faster than endless meetings and drafts. It is also much more likely to resonate with your users, which ultimately is what it is all about. That said, it is not without its challenges. Recruiting those users can be hard, and the tone of voice can be lost after you edit it. That means it will need testing once you have finished writing the copy.

Testing is so fundamental to successfully improving conversion that these are challenges we will have to overcome, as we will explore in the next chapter.

Never Stop Testing and Iterating

CHAPTER

9

CHAPTER 9

Never Stop Testing and Iterating

Can I let you into a secret? Just before I started writing these lines, I was sitting in bed on a lazy Sunday morning, setting up a survey to test a home page I had been designing. It took me less than 20 minutes. What is more, I expect to have approximately 150 responses within the hour.

Most of those responses will be free via social media. For the remainder I will have paid only a dollar per response with nothing more than a click of a button. Testing the effectiveness of your site is easy today. I would argue it is easier, cheaper, and less time-consuming than the endless debate and discussion that seems to go into most websites.

Imagine having a meeting to discuss the design of a home page. How many people would be in the room and how long would the meeting run? Let's be kind and say there were only five people in the room, and you were able to decide in an hour. That is five person-hours of effort to decide on a direction. The average salary for somebody working in marketing or digital is about $61,000 in the United States.[28] Most employees work approximately 1,800 hours a year. That means they cost about $34 an hour. $34 times five people in the room makes $170. Even with the time it took me to set up the test, it works out cheaper to run a test than have a meeting. It will also be approximately the same time too.

Of course, in reality, the chances of a committee coming to a definitive decision about the design and copy of a home page in an hour is fanciful. Even getting those people into the room can prove a logistical nightmare. So the next time somebody suggests that your company has neither the time nor money to carry out testing, spend a few minutes calculating the related costs. Next time they complain that it is hard to recruit participants, point out it is easier than calling a meeting.

However, although running testing will help cut through the endless debate, that isn't the primary reason for doing it. The real reason to test is that no amount of discussion or even expertise will get you to a highly converting website.

I hope the advice I give in this book will improve the conversion rate of your site. But this will only take you so far. You will quickly fix the most glaring problems and implement the most effective improvements. Before too long, you will not know what to do next.

People who run high converting websites don't then buy another book on conversion for the next set of useful tips. Instead, they have a robust process of testing and iteration that systematically improves their conversion rate over time. It is this process that I want to explore in this chapter. I want to explain when to test and how to go about getting useful results. I want to look at testing a new digital service and then go on to explore how to improve the conversion rate of that service post-launch in a systematic way.

28 https://smashed.by/salaries

If you think about it, the way most of us run digital projects is ridiculous. They usually begin with somebody in senior management having "a great idea." The manager often bases their idea on little beyond intuition and experience. The idea is also often lacking in detail. It then falls to others to flesh out what that idea means in practice. Typically, the project will have an impact on multiple stakeholders, and so a committee is formed to realize the vision. Bizarrely, this group of stakeholders often excludes the people who will design and build the project.

People who run high converting websites don't then buy another book on conversion for the next set of useful tips. Instead, they have a robust process of testing and iteration that systematically improves their conversion rate over time.

Usually, this committee then creates some form of specification for the project. They base this on various internal drivers and constraints. Rarely does it include any feedback or input from the customer. Next, the committee sets a budget and timeline for the project, often with only passing consultation with the people involved in creating the digital service.

Then, one of two things happens. The committee might hand the project to an internal delivery team who will slot it into their backlog, who addresses it on a first-come, first-served basis. Alternatively, the specification goes out to tender, and a third-party agency is selected. In either case, they are expected to deliver to the specification. An internal team may have more latitude to push back, but an agency is required to deliver on time and to the agreed budget. Even the internal team is expected to build to the specification provided. That makes scope creep or, indeed, any deviation the enemy, and so testing is mainly pointless. It probably took endless discussion and compromise to agree on a specification. Nobody is about to change that based on some user feedback!

The result of this is that when the team does finally launch the digital service, nobody knows if it will be a success or not. Nobody has any idea of whether it is delivering what the user needs or whether it will address any of the questions or concerns the user has.

Nobody even knows if people will understand it. Then, once the organization launches its new digital service and the budget runs out, people are reassigned, and everybody moves on. The minute the project starts to receive real feedback from users, everybody stops taking an interest!

There must be a better way. Fortunately, there is, and it all begins by validating the idea at the beginning of the project.

Test the Premise of Your Digital Services

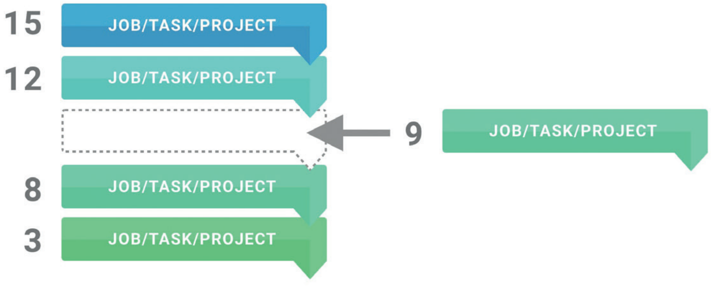
Every project has to start somewhere, and there is nothing wrong with a senior manager or anybody else suggesting an idea for a new digital service or product. However, we should not blindly implement that idea just because that person has seniority. It should not be prioritized over evolving existing services unless there is a strong case to do so. Of course, saying that is one thing; doing it is quite another, because it will require organizations to change the way they think and approach projects.

One solution is to have a robust process for assessing new ideas, and working out if and when they should implement them – something better than first-come, first-served, or who shouts the loudest and something that all parties can agree is fair and sensible. In my book, *User Experience Revolution*, I recommended a policy for prioritizing projects called *digital triage*.

This policy helps organizations identify which new digital services they should prioritize by scoring them based on:

- business objectives
- audience
- user need
- effort

Projects are held in a backlog, ordered by their score. When a new idea emerges within the organization, the organization should assess it and give it a score based on the four criteria, which determines its position in the backlog.



By rating projects based on these criteria, the organization prioritizes the ideas with the best chance of providing business value. Suggestions with less potential never make it to the top of the list. When a project champion is unhappy with their score, or a senior manager wants to skip their place in the queue, the decision can be escalated to a steering committee. If the committee decides to prioritize the project, the scoring criteria will be adapted to reflect the new business reality.

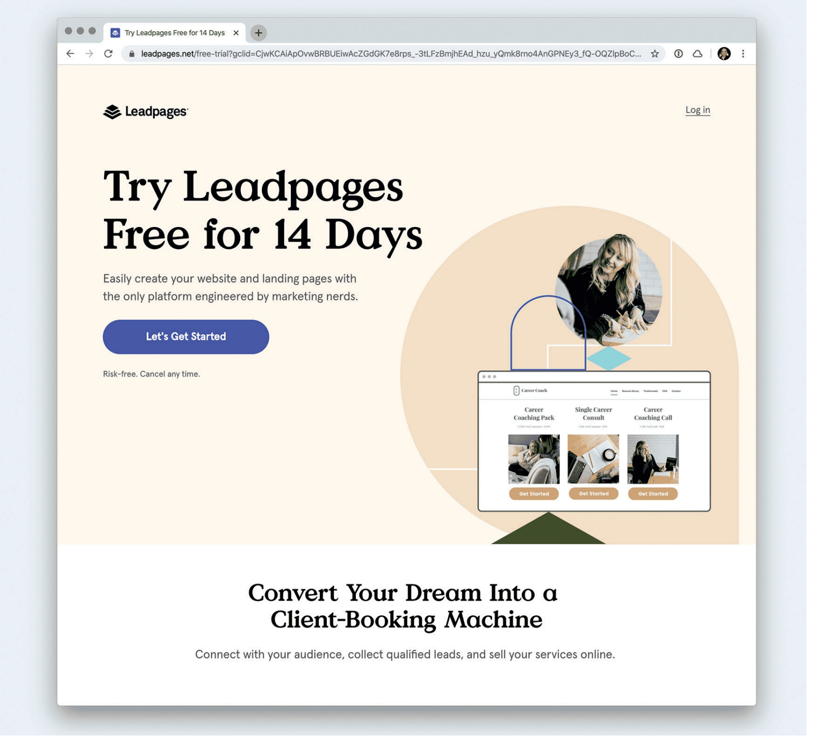
However, good though digital triage is, it is not enough to assess the likely conversion potential of a project or the interest in a new product. For that, you need a different approach.

Imagine for a moment you have an idea for a new product. Perhaps you are considering creating an online course or writing a book. How do you know whether people will buy what you are offering? Alternatively, you might already have an existing product, and you are contemplating a new approach to marketing it. How do you know that a new idea will resonate?

In most cases, organizations don't. Instead, they guess, hoping that if they invest in enough ideas, one of them will work and cover the cost of the others. Occasionally an organization will do some market research. However, that is notoriously inaccurate. Consumers will often show interest in a hypothetical product and yet will be unwilling to part with money when the moment comes to buy. It is only at the moment of making a real purchase that our primitive brain wakes up. Only then does it feel a sense of loss that comes from parting with real money. That sense of loss is not triggered by a hypothetical situation.

An alternative is to test the market for an idea with a small initial investment. A technique I favor is to create a simple, single landing page for the product you are considering selling that attempts to sell the product as if it were real. If that is an existing product, it would be a page that takes the essence of your proposed approach for the promotion and attempts to showcase it.

In either case, this single page would have a call to action asking users to buy the product or make some other real commitment. Only if users think they are making a true commitment will you get a realistic idea of whether they would be willing to buy. When the user clicks the call to action, instead of making that



You can build a landing page in a couple of hours using a tool like Leadpages.

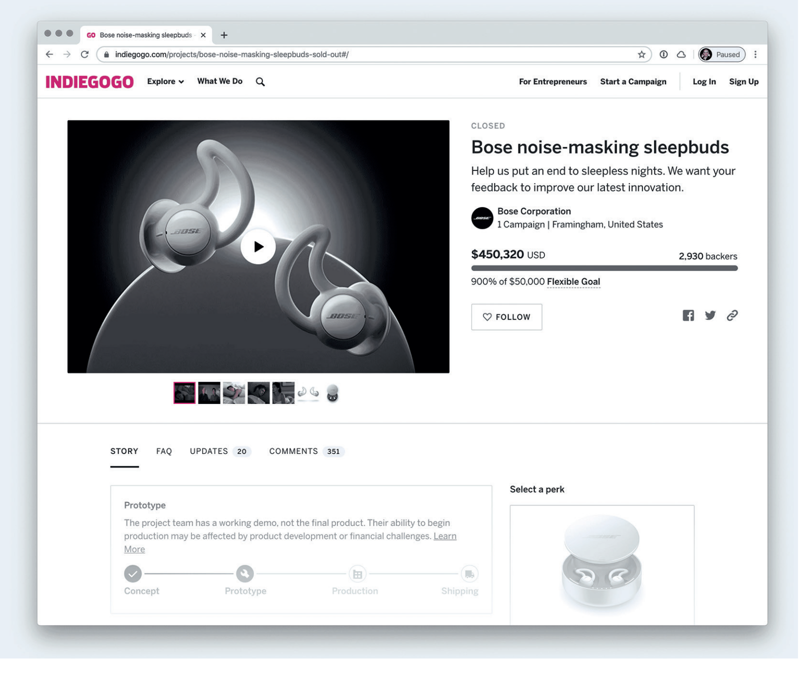
commitment, the copy can tell the user that the product hasn't yet been launched and asks them for their email address so that you can inform them when it does go live.

Now, I accept that from a usability standpoint, this is a terrible experience. A user clicking on a buy button, and then being asked for an email address instead, is a difficult transition. But getting users to part with money is even harder, so despite this somewhat jarring experience, it will give you some indication of how viable your idea is.

You can then drive traffic to this landing page to gauge just how many users would be willing to act in the real world. That will help you judge whether your product has real potential and if your approach to marketing it is likely to work – all at a fraction of the cost of building the real thing. It is a technique I have used to test everything from people's interest in buying a course or a book, to signing up for a software-as-a-service platform.

The secret is to keep the initial investment low. Use a tool like Leadpages to build the landing page or buy a theme. Focus on getting the messaging or copy as compelling as possible.

A variation of this approach is to launch a product on a crowdsourcing site like Kickstarter. Even big brands like Bose are using these sites to test interest in new products and to refine their approach to selling those products.



Even Bose has used this technique to judge interest on crowdfunding site Indiegogo.

These sites allow you to sell the product and test your marketing approach at a fraction of the cost of a traditional project.

Presuming the idea passes these tests and makes it to the top of the development backlog, the next hurdle is to ensure you adopt the right design approach. Once again, testing can help us to make sure this is the case.

Test Your Design Concepts

I envy the confidence of some designers and marketers. They present designs and copy to their clients, confident they have come up with the definitive approach for improving conversion. Personally, in 23 years of designing digital services, I have not once created a landing page I was happy with on my first attempt.

After "finishing" a design, I often come up with tweaks I think could improve conversion. When I don't, I worry that I might be missing something. After all, things can always be better.

I have only avoided going mad by having a robust process for identifying those improvements at the design mock-up stage, or at least being confident that further refinement won't provide tangible benefits at that point. It is a process built around testing.

Many designers get uncomfortable at the idea of testing design. They believe that in some way it will stifle their creativity and undermine their role. However, I would disagree. It still falls to the designer to find the right solution. All testing does is help validate that approach and possibly hint at how it could be further enhanced. Testing by itself is useless without the empathy and insights of a great designer.

That said, for myself at least, there are three tests I like to run when experimenting with design approaches. These are:

- the five-second test
- a semantic differential survey
- the first-click test

Each of these tests addresses a different aspect that influences your conversion rate.

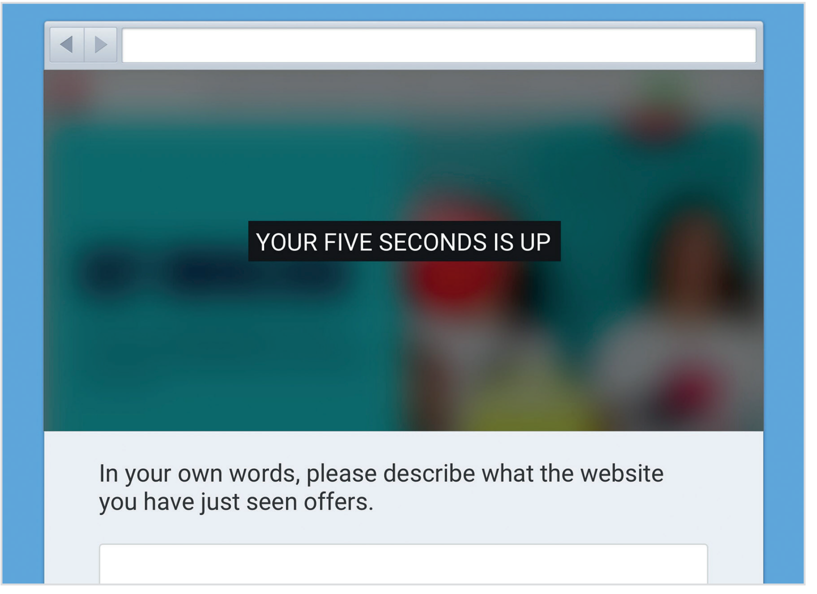
FIVE-SECOND TESTING: DO THEY GET IT?

I mentioned this form of testing in chapters 6 and 8. It involves showing a user a web page or user interface for only a few seconds before it is hidden, and you ask them questions about what they have seen. The length you can show the design for can vary. However, typically it is between five and ten seconds. Also, the questions you ask are entirely up to you.

However, when considering conversion rate optimization, I tend to focus on a single question: "What does this website offer?"

As I mentioned in chapter 7 on cognitive load, according to research carried out by Microsoft, users only spend a few seconds assessing a website. In those few seconds, we must communicate what the site offers – hence the question.

One would think that this fundamental role of any landing page should go without saying. However, I regularly encounter sites that leave users confused as to what they are offering, even on more extended viewing. If your design doesn't communicate what you offer, users are likely to click the back button and go to the next site in their search results listing.



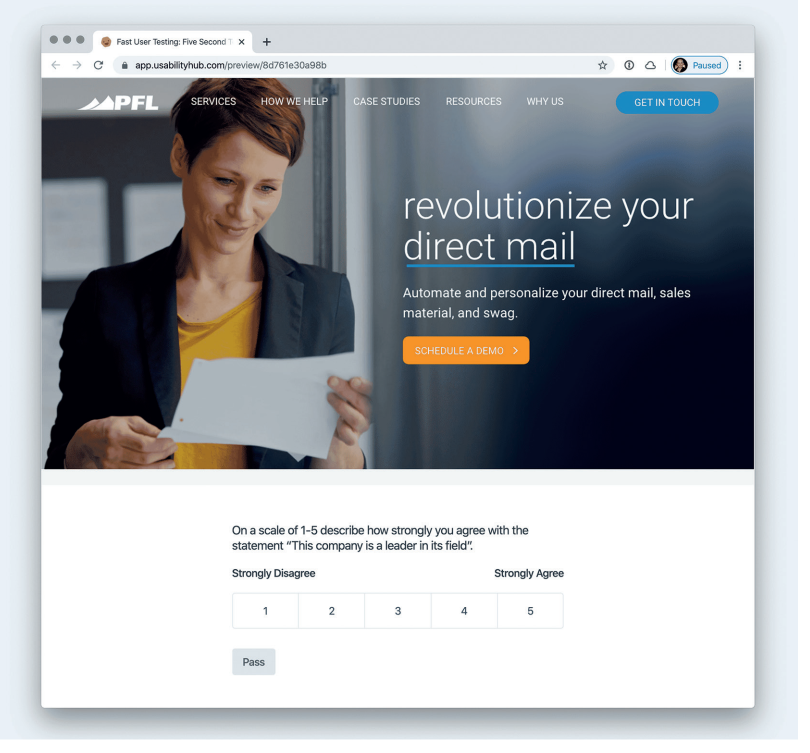
A five-second test is a useful way of ascertaining whether somebody gets the basic topic of a website.

But just because a user understands what a site is about, it doesn't mean they will find your offering compelling. That is where a semantic survey can help.

A SEMANTIC SURVEY: DO THEY FEEL IT?

A semantic differential survey is a grandiose name for a simple idea. It allows the user to grade a design against specific keywords. For example, you might ask, "On a scale of 1–5 how trustworthy do you find this site?" Not that you are limited to asking about trustworthiness. You could ask how compelling it was or how it communicated.

One of my favorite uses of a semantic differential survey is to judge whether a design communicates the right kind of "feeling" in the user. Before I start designing, I agree on a list of keywords that we want the design to communicate. For example, the client might want to express that their brand is friendly or loyal. Once I have completed the design, I run a semantic differential survey and ask users how they would rate the design based on these criteria. That proves a great way of reassuring the client and myself that the design is heading in the right direction.



A semantic differential survey can be useful for establishing whether a design creates the right emotional response.

If your design ranks well both on the do-they-get-it test and in terms of how it feels, then you are halfway there. However, the other significant factor is whether users can get the answers they need from the site.

FIRST-CLICK TEST: CAN THEY FIND IT?

As we have already established, users have questions and objections that prevent them from acting. Even if they resolve these to their satisfaction, they need to know how to respond. That means a page needs to offer clear signposting. It needs to be obvious how users can get answers and how they can then take action. Of course, testing this with a static design mock-up is not easy. We cannot ask users to navigate the site because that site does not yet exist. Instead, we can run the first-click test.

One of the most influential studies into usability, "FirstClick Usability Testing"[29] by Bob Bailey and Cari Wolfson, delved into the importance of the user's first click being correct. Their findings showed that if the first click was right, users had an 87% chance of completing the action correctly, as opposed to just 46% if the first click was wrong.

A first-click test, therefore, asks users where they would click to complete specific tasks, such as getting an answer to a question, or clicking on a call to action. If the user makes the correct selection, you can then be confident in your design.

Together, these three tests can give you a reasonable degree of confidence that your design is heading in the right direction and should do a relatively good job at converting. What is more, all three are straightforward to run. I run all of these tests using UsabilityHub that allows me to run the tests online in a matter of minutes.

The biggest challenge is recruiting participants. However, even that is not that large a problem. You can post the tests to social media channels or even on an existing website. If you are in a hurry and have a small budget, UsabilityHub will handle

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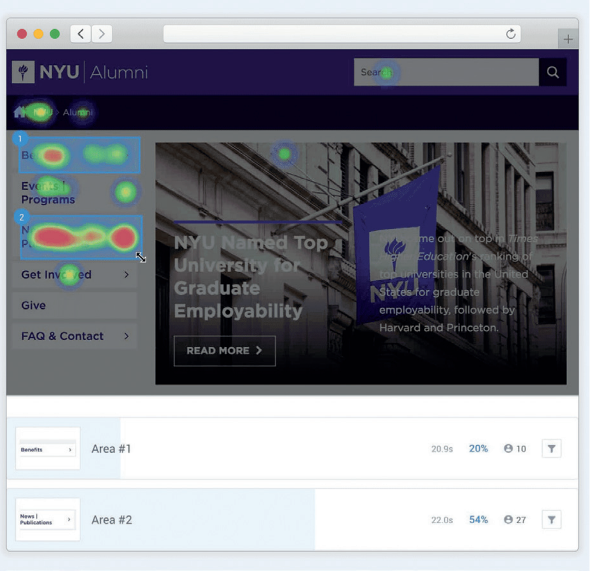
29 https://smashed.by/firstclick

A first-click test helps you understand whether the user understands the visual hierarchy of the website.



recruitment. You pay $1 per participant and get results back in an average of about an hour. With this kind of testing becoming so easy and cheap, it is ridiculous not to test the effectiveness of designs.

We shouldn't just be testing design concepts, however. We should be checking throughout the build process, starting with your initial prototypes.

Test From Prototype to Minimum Viable Product

Building a prototype of any digital service is almost always a good idea. It is particularly useful for projects where improving conversion is critical. Prototyping provides an opportunity to establish three things:

1. Can users find the information they require to make a decision?
2. Did the information they find prove successful in persuading them?
3. Can they quickly complete the call to action with minimum cognitive load?

In essence, we are testing the usability of your prototype and its persuasiveness. That is something you will repeat and expand on as you build the final website.

TESTING USABILITY

I have mentioned usability testing several times through this book, but I know that many consider it beyond what they can do in their projects due to budgetary or time constraints. It's a position I sympathize with, even though I work with large organizations such as Puma, Doctors Without Borders or GlaxoSmithKline, which you would think would have the budget for testing. I still meet resistance to usability testing; somehow there never seems to be the time or budget.

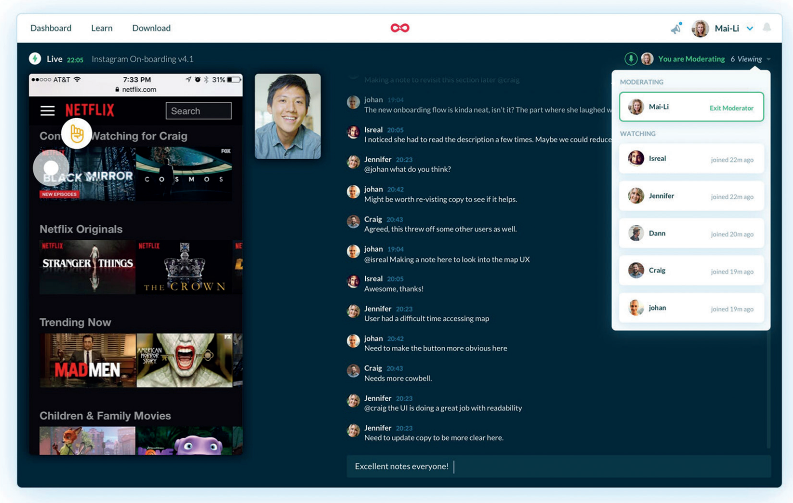
Although I don't always get to do the kind of usability testing I want, I still manage to do something and, in my opinion, something is better than nothing. At least it is if you are aware it won't be perfect. Too often, usability testing is associated with expensive user research agencies, eye tracking, specialized usability labs and statistically significant groups of participants who are all exactly the right kind of person. Fortunately, that is not the only way of doing things.

In his excellent books, *Don't Make Me Think* and *Rocket Surgery Made Easy*, Steve Krug lays out a lightweight approach to testing. It is a method that can be followed throughout the prototyping and build stages, right through to post-launch. Krug proposes setting aside one morning every month for usability testing. In that morning, he recommends testing with three participants, using nothing more than a computer with a webcam and some testing software.

He encourages you to invite as many stakeholders as possible to view the sessions from another room. That includes developers, designers, copywriters, project managers, or anybody else who might be interested. If you cannot persuade people to attend initially, record the sessions and send them edited highlights. In my experience, this will grab their attention, and with luck they will then participate next month.

After the sessions, sit down over lunch and discuss what lessons you have learned and how you can make things better. That's it! It doesn't need to be a formal thing and you don't need to have usability testing in your job description. Anybody can run the sessions with no training (although I recommend reading Krug's books). You don't need to write any formal reports as the lunchtime debrief is enough of an opportunity to work out what you need to do. And because you are testing every month, you will quickly find out if the changes you have implemented work or not.

Yes, you could create a formal process or system for tracking usability hurdles and whether they have been fixed or not. But that is overkill for all but the biggest and most experienced teams. By keeping it lightweight and informal, it is much more likely to happen and happen regularly. With regular testing, you can incrementally improve your service over time. Each round of testing will uncover new issues that were not picked up before or have



Lookback is one of my favorite tools for recording both in-person and remote usability testing.

been added in since. That is why it is good to continue testing from initial prototype to the launch and beyond.

Research carried out by Jacob Nielsen[30] found that testing with three people will catch about 75% of the usability challenges in each round of testing. Anything more than about five people and the number of new issues found will diminish dramatically. Not only that, but the three people don't even need to match your customer's exact demographics. Don't get me wrong; it is better if you can get real prospects. However, anybody outside of your project and company would be perfectly adequate because, when testing usability, most of us will struggle with the same challenges. Only if you are testing the young or old will you find unique requirements that others might not have.

Even better, you don't need to be in the room with participants to test with them. Remote testing works well too, and you can do it with an app like Skype or Zoom. If you want to be a bit

30 https://smashed.by/testusers

more sophisticated, you could consider using a tool like Lookback. Lookback allows you to speak to and see users, while also being able to watch their screen. You can record sessions and it is easy to add notes.

Lookback also allows you to run unfacilitated testing where you set users a task that they complete on their own schedule, without your presence. Although unfacilitated testing doesn't let you question participants or prompt them to say what they are thinking, it can be useful if your time is particularly limited.

Even recruitment can be made easier using a service like TestingTime that will help you find participants for both in-person and remote testing. In short, you can run testing cheaply and quickly, so there is no reason not to make it a part of your conversion rate optimization workflow.

As for what you cover when running usability testing, that depends on what you are doing at the time. If you are prototyping, you are trying to establish whether users can find the answers they need and whether they find the call to action simple to use.

After explaining the process to participants and trying to put them at their ease, I usually begin usability testing by talking about expectations. When I was working with an e-learning company that sold online training, I started by asking participants what they would want to know before they would be willing to enroll in a course. What would they expect the website to tell them? Starting sessions like this, before they even see the site, is a chance to sanity-check the content on the website. Have I identified the right questions and objections?

I then usually asked the participants to pick a particular question they might have and ask them to find the answer to that question on the website. For example, if they wanted to know how long a typical course would take to complete, I ask them to find that information, encouraging them to speak out loud about what they think as they complete the task.

That's all there is to it. You will be amazed at the insights such a simple exercise will uncover. Some participants will have questions you had never considered, while others will be unable to find the answer to their question despite it being clear to you. Still others will discover their answer, but find it unconvincing. That last response is particularly poignant when considering conversion rate optimization. It is not enough that your website is usable, it also needs to be persuasive, and so that is something we need to test as well.

Some participants will have questions you had never considered, while others will be unable to find the answer to their question despite it being clear to you. Still others will discover their answer, but find it unconvincing.

TESTING PERSUASIVENESS

Unfortunately, finding out how convincing somebody finds your website is not particularly straightforward when running something like a usability test. Participants are often keen to please (especially if you are paying them) and so will be more positive about your offering than they would be in normal circumstances.

Even if they are honest with you, there is a big difference between asking somebody if they would be willing to act and them taking action when they would incur a real cost. People are a lot more risk-averse in the real world.

One way around the problem is to end a session with an offer. I completed the session of testing for the e-learning website by asking people if they would be interested in signing up for a course there and then for a substantial discount. Their answer gave me an indication of just how persuasive the site was. Other times I have asked people to commit to signing up to a newsletter, or taking some other form of action based on the offering made by the site. If people were willing to pay some price (no matter how small) it was an indication that things were looking positive.

Of course, persuasiveness cannot be our only indication of success. If it were, then our sites would be full of the manipulative techniques I warned you to steer clear of. To avoid this fate, I ask one last question before wrapping up a session. I ask people if there was anything about the site that annoyed them. If they start talking about how manipulative it was or that it made them feel pressured, then we are on dangerous ground.

This kind of usability testing will act as your compass during development, ensuring that your content is relevant, easy to access and compelling. We can use it on a simple prototype through to launching your minimum viable product. Notice that I refer to a minimum viable product, not your final website. That is for a good reason.

Test and Evolve Your Digital Service After Launch

The web is not the same as print – a simple fact we so often forget. Time and again, I see companies treating the launch of a sales website in much the same way they would send a brochure to print. Those in charge of the project agonized over the copy and design, endeavoring to get it just right. Then, the moment the organization launches the site, they congratulate themselves on a job well done, and all move on to the next project.

Such an approach fails to account for the two most exceptional characteristics of digital when compared to print:

- It is relatively easy to update.
- It provides unprecedented amounts of data on user behavior.

That is why I refer to launching a minimum viable product, rather than a final website. Instead of struggling with producing the perfect website for launch, we should instead focus on providing the most straightforward version we can get away with and then evolving that website based on the data we receive about user behavior. After all, it is not until we put our website out into the real world that we truly know how it will perform and whether it will convince users to take action.

However, a minimum viable product doesn't mean poor quality, rushed products. It is not about launching shoddy design work or draft copy. Instead, a minimum viable product refers to a highly focused product that does a small number of things well.

That kind of focus can come in several forms. One option would be to focus your minimum viable product on serving a specific audience, rather than launching a much larger website that attempts to cater for the complete range of people who might be interested in your product or service. By adopting this approach, you can refine your offering and messaging before attempting to attract a broader audience.

The second approach is to focus on promoting a subset of the benefits or addressing the largest of the objections users have. Many websites struggle because they try to communicate too much information to users. By keeping the site focused when you launch it, you can get to market faster, and better measure the impact of expanding the website with additional content over time.

The final way to keep your minimum viable product focused is to avoid introducing too many calls to action. That is good practice in any case, but it also prevents your first version trying to do too much. For example, let us imagine you are trying to sell a piece of software. No doubt you will be keen to ask users to subscribe to a newsletter so that you can keep in touch with people who are not immediately ready to buy. However, when launching a minimum viable product, it makes sense to exclude these secondary actions. That keeps your website focused and avoids building sign-up forms or writing a regular newsletter. You can always add this functionality later.

Even if you do not adopt one or all of the approaches above, you will still be launching a minimum viable product. No site is ever the best it can be when you first put it online. It will always need to be evolved and optimized. The question then becomes: how do you know what to optimize and improve? Or put another way: how do we improve our conversion rate over time?

The approach I adopt is a three-step process, consisting of:

1. Identifying where the website is underperforming.
2. Forming a hypothesis about why it is underperforming.
3. Testing possible fixes to the problem.

As you will see, different tools will help us with each step of that process.

IDENTIFY PROBLEMS WITH ANALYTICS

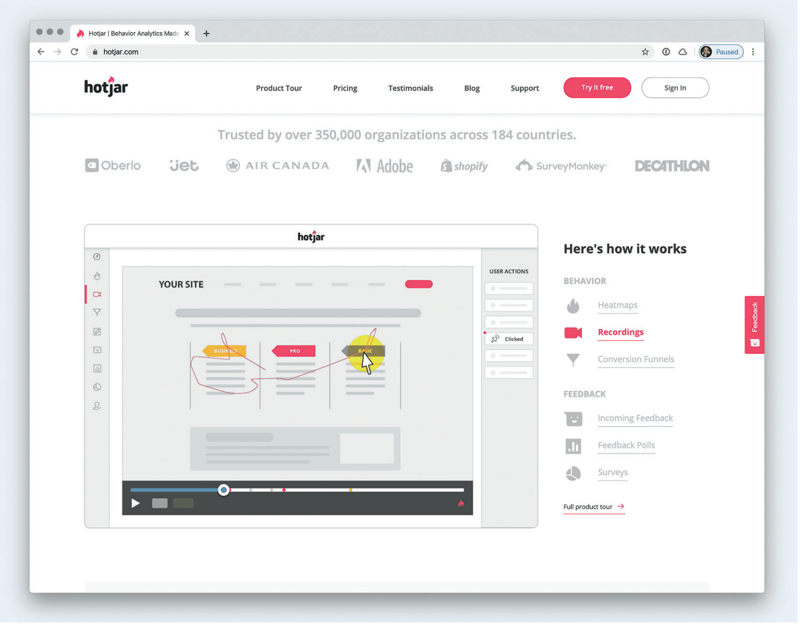
Site analytics is an invaluable tool in identifying where the shortcomings in your website occur. Unfortunately, few people use analytics to their full potential. Instead, they launch Google Analytics, look at the default dashboards and take a vague interest in whether the numbers have gone up or down. That will do nothing to help you improve your site's conversion rate.

In our case, we want an answer to a specific question, and that helps us make the most of analytics. We want to know where on our site we are losing people. That will give us an indication of where the problems might be. However, we cannot merely look at a list of exit pages. We will first need to filter out people who hit the site and then almost immediately leave. No amount of conversion rate optimization is going to recover a user who spends less than five seconds on your website. In those situations, you need to improve the targeting of your marketing and address site performance.

Once we have filtered our results, we should end up with a list of top exit pages. We can now start with the most popular exit page and start working down the list.

FORM A HYPOTHESIS WITH SESSION RECORDERS

Once we have our top exit page, we need to work out why people are abandoning that page. I usually start by watching some session recordings. Using a tool like FullStory or Hotjar, I can identify users who abandoned the site after viewing the exit page and watch videos of them navigating that page.



Hotjar allows you to watch anonymized user sessions and identify problem areas.

These anonymous videos allow me to see how much they scrolled, where they clicked, what they spent time looking at, and what they hovered over. I can also see the page exactly as they saw it.

Often, watching a few of these sessions is enough to allow me to form a hypothesis about why users might be abandoning the page. Sometimes it could be because the page is rendering poorly for these users; other times it might be that they scroll right past some critical piece of information without noticing it. These videos can reveal a wide range of problems.

However, sometimes it isn't obvious. In such situations, we need to turn to other approaches. One solution is to ask people. Add a survey that is triggered when users go to leave the page, asking them why they didn't act. Another approach is to intercept users using a tool like Ethnio. Instead of asking them if they would complete a survey, you ask them if they will take part in some usability testing. Ethnio will then enable them to schedule a time to run the session.

Hopefully, between session recorders, surveys, and usability testing, you will be able to form a hypothesis about why users are abandoning the site. The final step is then to test some solutions to the problem.

TEST POSSIBLE SOLUTIONS

Just because you know what the problem is doesn't mean you necessarily know the best way to solve it. You may identify several different solutions that could help. Working out which of those solutions will work best depends on the site you are testing. Specifically, it depends on the amount of traffic you have.

The way that the likes of Amazon, Booking.com and other big-name sites approach identifying the right solution is through A/B testing. A/B testing is an excellent tool for experimenting with different possible solutions, and it is free to get started thanks to tools like Google Optimize.[31]

Imagine an organization found that a particular headline was putting users off of buying. They would run an A/B test to show subsets of their audience different versions of the headline to see which performed best. They wouldn't experiment with only one alternative either. These massive online companies would probably show small segments of visitors a variety of different approaches. The more options they trial, the better chance they have of finding a solution that performs significantly better than the existing version.

Be careful, though, as A/B testing can come with a performance hit that could reduce conversion. Another problem with this approach

31 https://smashed.by/optimize

is that you (probably) do not have the traffic levels of Amazon or Booking.com. That means that you don't have enough people to show different versions of the headline and see whether the change impacts the conversion rate.

Not that this entirely rules out A/B testing for lower-traffic websites. You will just have to approach it differently. One way of overcoming the problem of low traffic is to focus on testing elements very closely linked with the successful action. For example, changing the text on our newsletter sign-up form is intimately connected with the success criteria of pressing the subscribe button. However, testing the impact of a blog post title on newsletter sign-up is not as strictly related, and so the conversion rate will be lower, and that means it will take longer to see results.

Another approach is to focus on micro-conversions. Instead of making your success criterion something that doesn't happen very often (like newsletter sign-up) you could look at a smaller, more frequent action. For example, if you wanted to test those blog post titles, you may be better off testing how many users click to view the post, rather than whether they go on to sign up.

Also, unlike on a high-traffic website, limit the number of variations you use on a low traffic site. The more differences you create, the longer it will take for you to get statistically significant results. Try to focus on changes that will have a significant effect on conversion. Google famously tested 15 different shades of blue to find out which one performed the best – but you are not Google.

Fiddling around with small changes could have a significant impact on conversion, but it's more likely that testing something big will have a more noticeable effect. So focus your tests on areas of the site that visitors consider essential and thus are more likely to have a significant impact. Be brave!

Finally, consider lowering the threshold by which you judge whether a test has been a success or not. Most of the A/B testing tools out there set a high standard for judging success, and so on a low-traffic website you have to wait a long time before you have enough results for it to declare a winner. However, you can make that judgement earlier if you cannot afford to wait any longer.

Not that A/B testing is your only way to work out which solution is likely to work best. We can also make use of a tool like UsabilityHub (mentioned earlier) to run preference tests or semantic differential surveys with users. You also have the option to run usability testing too. These approaches are not just better than A/B testing because they don't require lots of traffic. They also have the advantage that you can create mock-ups of possible solutions rather than having to implement the whole thing. That is particularly helpful if you are making more substantial changes.

Whichever approach you ultimately adopt, what matters is that you get into a habit of evolving and optimizing websites after launch through a process of identifying problems, proposing solutions, and testing them.

That said, A/B testing is a superb tool if you can take advantage of it. These are real users taking practical actions on your actual website, and for that reason alone it makes a good option when testing possible solutions.

Whichever approach you ultimately adopt, what matters is that you get into a habit of evolving and optimizing websites after launch through a process of identifying problems, proposing solutions, and testing them. If you do that, you will be on your way to a highly converting website.

However, what should be evident by now is that it is not just your website that determines your conversion rate. We need to look at the entirety of our offering and the end-to-end user experience.

Address the Whole Experience

CHAPTER

10

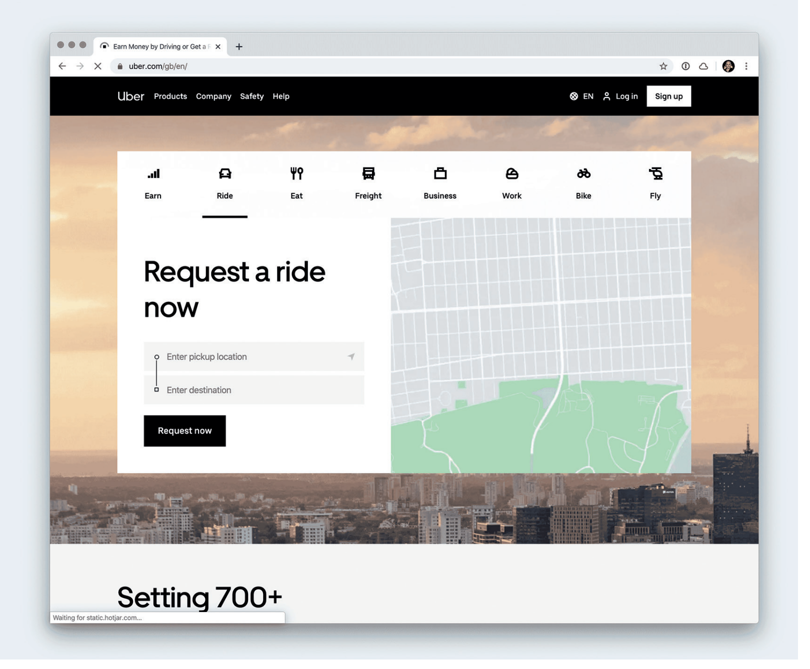
CHAPTER 10

Address the Whole Experience

When I first came across Uber, I was speaking at a conference. A few other speakers and I went to a bar after the event. When the time came to return to our hotel, somebody in my party ordered us an Uber. I was immediately sold. From beginning to end, the entire experience was seamless, and it wasn't long before I was taking Ubers regularly and recommending it to others.

Whatever ride-sharing service you use these days, I suspect your experience was similar. You didn't start using it because of some slick advertising campaign or even its website. You started using it because of recommendations.

Of course, marketers have long known that the best kind of marketing is by word-of-mouth. To achieve that, you need an outstanding experience and that is what Uber provides.



Uber's website is only a minor part of why people use and recommend the service.

Think for a moment of all of the components that have to work together for Uber to provide a great experience:

- how safe you feel taking an Uber
- the persuasiveness of their website and App Store listing
- the ease of use of the app
- the way the driver treats you and drives
- the cleanliness of the cars
- the way Uber takes payment
- email communication
- customer support

- the reliability of the underlying technology
- the accuracy of the reviews in the app

The list goes on and on. All of these things influence how likely people are to reuse the service and what they say about it. The best-designed interface in the world, even when combined with the most compelling copy, will not be enough if the product and overall experience are inferior. As the saying goes, that would be like putting lipstick on a pig!

Many teams are held responsible for improving online conversion. Yet the tools at their disposal to achieve this are limited to tweaks to the user interface and copy. That will not be enough to get the job done. To create a compelling experience that encourages recommendations and ongoing engagement, we need to address the broader experience of users systematically. That means:

- considering the whole website experience (not just copy and design)
- improving other digital channels beyond the website
- enhancing the experience outside of digital channels

The most natural place to start is by looking at our websites more holistically.

Think Beyond Design and Copy

Most people reading this book will either work as marketers or designers. However, it is not only copy and design that influence the effectiveness of your website as a conversion tool. For example, I wrote about the role performance plays in improving conversion. If your website is slow to load, it will have an enormous impact on the number of users taking action, even if they hang around long enough to see the call to action in the first place. Not only that, but poor performance will lower your search engine rankings, preventing users from finding your website in the first place.

Too often, we get our priorities wrong when designing a website for conversion. We focus on aesthetics, introducing lots of imagery and fonts, and although these elements can help encourage clicks, they cannot be allowed to compromise the performance of a site.

First and foremost, a high-converting website must be accessible (which here means fast to render), then it must be relevant and usable. Only after those things are in place do we start working on improving a site's persuasiveness.

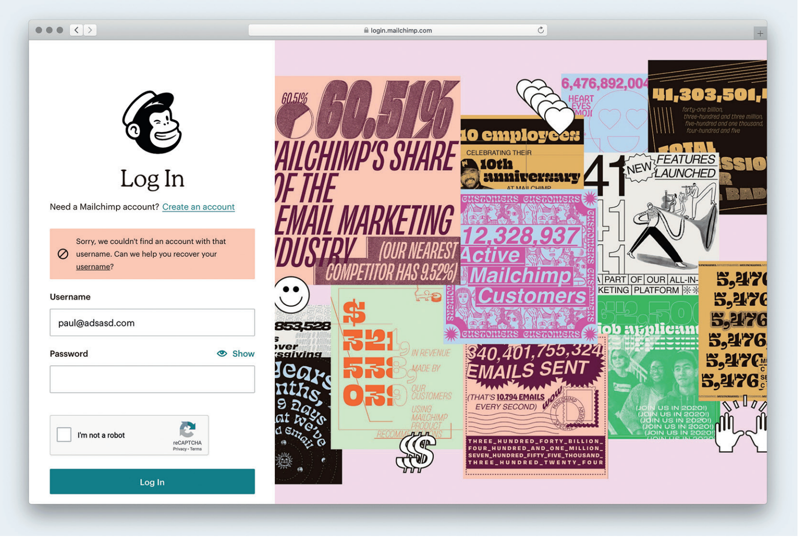
Of course, accessibility is not just about performance. It also includes accommodating users who are using a range of devices, older browsers, or ageing technology. Then there is also the need to assist users who have a disability. When you focus on conversion rates and return on investment, it is easy to overlook the need to accommodate people with disabilities. Organizations routinely underestimate the return that improving accessibility for disabled people can generate. For example, the US Department of Labor estimates that disabled people in the US have $175 billion in discretionary spending.[32] With one in five Americans having some form of disability, this is not an audience we can afford to ignore.

And that is just the start of the market opportunity ripe for exploitation. For a start, the vast majority of people who reach middle age begin to have some form of eyesight problems. Also, as we age, motor skill problems from arthritis and other conditions become increasingly common. Websites that fail to take

32 https://smashed.by/spendingpower

into account these common conditions will inevitably see a lower conversion rate. Almost all of us have either a temporary or situational disability many times during our lives. We may break an arm or get an eye infection, both of which would be examples of temporary disabilities. Alternatively, we might struggle to see due to screen glare or have to navigate a website one-handed because we are holding our child. Ignorance and shortsightedness around accessibility provide a competitive advantage to organizations that seriously address it, rather than just conforming to legal minimums.

One common factor of both accessibility and performance is that developers primarily shape them. When thinking about improving conversion, few think about the work of developers; instead, they focus on the quality of work that marketers, copywriters, and designers produce. In reality, developers have a massive impact on the conversion level you will see from your website.



Unlike many login forms, Mailchimp's does not just tell me I have got my username wrong; it gives me help to correct the problem.

Take calls to action that require users to fill in a form. It often falls to the developer to make these forms work, addressing the details that designers often overlook. Error handling is an excellent example of how a developer's decision can make or break whether a user completes a call to action.

Recently I was booking last-minute flights to Cairo, and I found myself trying to book using my mobile phone. Data entry on a mobile device is not easy at the best of times, but this website seemed to have gone the extra mile, determined to make it as hard as possible for me to hand over my money!

I encountered many problems completing that form, but one of the most frustrating was when I tried to enter my postcode. I initially formatted the postcode as all uppercase, with no spaces. That is the most common formatting for a UK postcode. However, on submitting the form, it generated an error. It was an error I nearly missed, as it appeared at the top of the page, not at the bottom, where I was focusing at the time of submission.

The positioning of the error message was frustrating, but let's blame the designer for that particular crime and instead look at the mistake the developer was making. I checked my postcode and confirmed I had entered it correctly. I then concluded that the developer must want me to format the postcode in a particular way. But there was no guidance on how to do this.

I took a guess and inserted a space between the fourth and fifth characters as this was a format that you would sometimes see online. Once again, I received an error message merely telling me my postcode was invalid. At this point, I was ready to give up and book with another airline or through a third-party site. However, my professional curiosity had gotten the better of me. I had to know exactly what the developer expected from users.

Next, I formatted the postcode in all lowercase and again it didn't work. That didn't surprise me as people rarely write postcodes in lowercase. Then I tried entering the postcode in lowercase but with a space – still nothing. After many, many attempts, I found the problem. The developer's validation rules required the post-code to be all lowercase. Although I had tried that, what I didn't realize was that my mobile browser was automatically capitalizing the first letter.

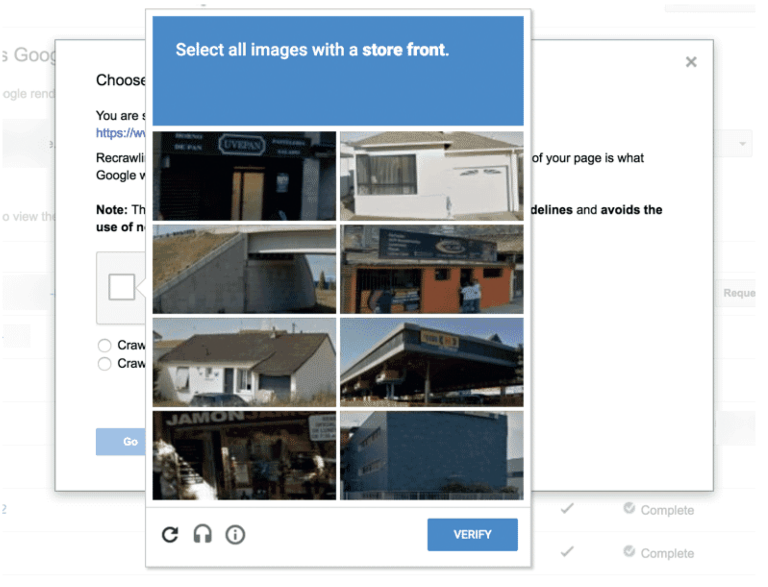
I couldn't help wondering how much money the airline was losing because of this one mistake, not to mention the costs associated with all of the additional support queries that the company must be receiving.

Let me be clear about what error the developer was making. The problem wasn't failing to consider mobile devices; it was requiring the user to format data in a specific way. Maybe, the developer chose this approach because it was easier to ask users to format the data in a specific way than it was to format the data on the server-side.

Don't get me wrong. I am not criticizing the developer. Chances are the developer was not given the time they needed to do that work or to test things thoroughly. The irony is that cost saving in developer time would probably be a drop in the ocean compared to lost sales and increased support. The very definition of a false economy.

These kinds of false economies happen all the time. CAPTCHA is another example of how a developer's shortcuts can undermine conversion. Once again, it is easy for a developer to require users to identify themselves as a human before placing an order or submitting a lead generation form. By comparison, it is much harder to address the problem of spam in other ways, such as using honey traps.

Although CAPTCHA has improved somewhat over recent years, it still regularly requires users to complete security challenges, especially on mobile devices. That means it can often create a stumbling block that puts users off progressing.



CAPTCHA still requires people to complete security challenges by identifying parts of an image, such as storefronts or crosswalks. It happens often when you change locations or submit multiple inquiries one after another.

What these examples teach us is that if we rush development, we undermine conversion. A short-term cost saving comes with a long-term price. Developers are fundamental contributors who can often be critical in determining whether a site converts or not.

The website is not the only factor that limits conversion, however. Other considerations will influence online conversion, factors that have nothing to do with the site itself.

Think Beyond the Website

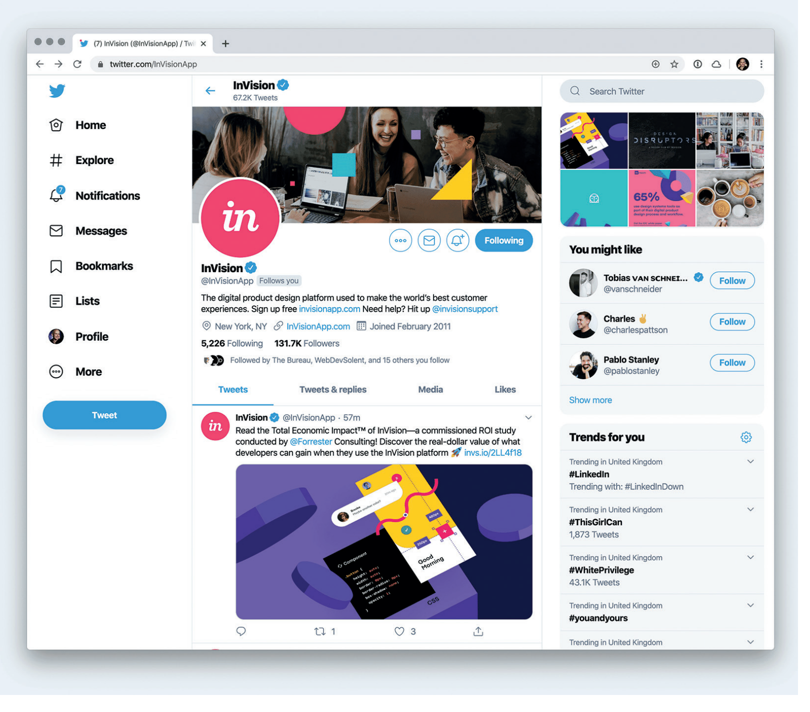
In most situations, your website is a small part of a broader customer journey, as we discussed in chapter 4 on building a user-centric sales funnel. Many things lead up to a decision to take action on your website. Equally, even once people have acted on your site, the conversion can still be lost if things are not handled well afterwards.

I work with a lot of universities, and one of their big aims is to encourage students to attend their institutions. They put a lot of effort into open days, prospectuses, advertising, and their website, all to attract students. All too often, unfortunately, things fall apart once students accept an offer. There is a period between a student accepting an offer and attending the university. During this time, there is nothing to stop the student from changing their mind and accepting another offer, or dropping out entirely. It is a period in which many universities lose large numbers of students who had supposedly converted.

Of course, there are many reasons for this. But a significant factor is the communication that happens in this period. Most universities have put little thought into the email communications that get sent out during this time. Typically, it can be a dizzying array of requirements and things to do. It overwhelms many students.

Here is the difference between the work of a user experience designer and that of a user interface designer. A UX designer understands that the customer experience does not stop at the edge of the screen. Their job is to ensure the journey works as a whole, encouraging the user to take action, and then to deliver on that experience successfully. Social media channels, mobile apps, and email all play a role in the chances of users converting on your website. If these channels do not encourage the right types of users to your website, or fail to set their expectations correctly, they will almost certainly fail to take action.

Many organizations seem to focus their social media efforts almost exclusively on either customer support or posting news. Yet this kind of content is not going to encourage users to come to your site to take action. Instead, social channels should be used to share content that is engaging, informative, and related to your products or services. These posts should then encourage users to get more useful information from your website in the form of valuable content. As well as providing helpful advice to readers, this content should also encourage people to try your product or service.



InVision uses social media to share content that is engaging, informative, and related to its product.

Prototyping tool InVision does an excellent job at this. The majority of InVision's social media feeds focus on promoting the valuable educational advice found on its website. The website then encourages users to sign up for the email newsletter.

This newsletter is used to build an ongoing connection with prospective customers by regularly continuing to provide additional valuable advice to designers. It also gently reminds the reader about the quality InVision offers, so when people are looking for a prototyping tool, they think of InVision.

The power of this approach is that social media and email are doing a lot of the heavy lifting in the sales cycle. By the time people visit the website, they are already convinced that InVision understands designers' needs and they're ready to buy. By contrast, if email and social media are only used to badger users into buying, or boring them with company information that provides no value, the website has to work much harder to encourage people to take action.

Of course, even more crucially, people will not stay signed up to social media channels or newsletters that take this approach. There is a reason why InVision has 131,000 followers on Twitter, while other businesses are lucky to have a few hundred. If you want people to remember you when they come to buy, then you need to keep in touch with them. You will fail to stay in touch with an audience who can easily unsubscribe if you continually focus on self-promotion, rather than providing value. To have the best chance of encouraging users to take action, we need to consider the whole journey, as discussed in chapter 4. That means social media, apps, and email are all intrinsic parts of the process.

Unfortunately, even if you create a slick online sales funnel, you may still fail to convert because of offline factors.

Think Beyond Digital

Often the best way of improving the conversion of your product or service is to make the product or service better. Sometimes that means reevaluating the core offering itself. It may be that there isn't an audience for what you provide or that the market is replete with better things. Often, however, it is not the core offering, but the broader experience that is at fault.

For example, consider the demise of Blockbuster and the rise of Netflix. The primary service of allowing people to rent movies was the same in both businesses. In Netflix's early days they provided movies on physical disks. The difference was that the DVDs were posted directly to you, and you could have a set number of discs at home for as long as you wanted for a flat fee. Returning a DVD was as simple as popping it in the nearest post-box in a prepaid package.

What allowed Netflix to flourish was that they improved the service that existed around that primary proposition. You didn't have to worry about late fees or physically going to a store to hire and return movies.

You see this same principle again and again – a company that takes an existing offering and provides a better service to gain a competitive advantage.

One of my favorite examples is a company (that I have referred to in previous books) called Wiltshire Farm Foods. It sells frozen ready meals to older people. At face value, their business model should not work. Frozen ready meals are sold much cheaper by every major supermarket chain, and you can also buy a vast range of other products too. Why would anybody buy from

Netflix's early success was down to their convenience compared with competitors such as Blockbusters.

Wiltshire Farm Foods when they can get a more affordable, broader range elsewhere?

The answer lies in the service that Wiltshire Farm Foods provides around its product. They know their audience and understand what their customers do not like about the big supermarket chains. They know their elderly audience do not like strangers calling at their house, and so they police-check all of their delivery staff and send customers the same person every time. They know their audience worries about buying things online, so they allow them to pay on delivery.

Wiltshire Farm Foods does dozens of small things, from loading deliveries directly into customers' freezers, to allowing delivery staff to take new orders. Together, these add up to create a fiercely loyal customer base who regularly promote the company to others.

If you are looking to maximize conversion, there is a lot you can learn from companies like Wiltshire Farm Foods. Through outstanding customer service, we can make our offering look considerably more attractive. Remember Zappos from chapter 5? For a long time, people said it wasn't possible to sell shoes online. After all, you need to try on shoes. You have to be confident they'll fit.

Many believed this was one area where a physical store would always win out. Then along came Zappos with its outstanding commitment to customer experience, a 365-day returns policy, and no postage fee. People could order shoes with absolute confidence and return them if they didn't fit – all at no cost to them.

In chapter 5, I talked about objection handling. I explained how we could not ignore users' objections, and the need to address them in our site copy. But we can go even further. Like Wiltshire Farm Foods, Zappos, and Netflix, we can seek to remove those objections entirely.

My point is that we cannot see the selling and the creation of a product as two separate activities. They are deeply intertwined. Increasingly, companies are realizing this and marketers are becoming more involved in defining the product in the first place. Alongside this, the definition of a product is also expanding to encompass the services that surround the core business.

> We cannot see the selling and the creation of a product as two separate activities. They are deeply intertwined.

If you want to see a higher conversion for your product or service, you need to consider how that product or service could be improved to make it more attractive. Maybe through improving the experience of using the product. Perhaps a better returns policy or improved customer support. It could even be more attractive financing options. Whatever the case, a failure to convert can often be down to what's offered, and not the channels trying to sell the product.

However, there is one more reason why products and services fail to sell, and that is a failure to deliver on their promises.

Consider Delivery

It seems fitting that as we draw to the end of this book, we return to the beginning. In chapter 1, I talked about the dangers of persuasion and the rise of the empowered consumer. I explained how the web had given consumers a voice, which they can use to criticize brands that they feel fail to deliver on their promises. From reviews and ratings to PR disasters, companies can find it much harder to encourage conversion when faced with a tide of negativity posted about them online.

And only a small proportion of that criticism online is about the use of manipulative techniques. Most of it is about poor customer service or a failure to deliver. That happens because companies regularly overpromise in an attempt to encourage conversion. I recently had an experience that beautifully demonstrates this point.

It all began with a cowboy builder four doors down in our street. He decided to dig up the road – and cut through the telephone lines for the entire street. The following month of hell consisted of me fighting to run a digital business on expensive 4G, while Openreach (the company that maintains our telephone line) negotiated with the local council for permission to dig up the road and fix the mess.

In desperation, I looked for an alternative and discovered BT Business's broadband package. Cheaper than my current ISP and with the massive bonus of a product they called *4G Assure*, which gives me unlimited, superfast 4G if and when my broadband goes down. "You could have speeds almost as high as your broadband by tomorrow," the sales guy promised. On top of which, I would get access to BT's countrywide Wi-Fi network. The sales guy also offered me a fantastic deal on my mobiles if I bundled them into the broadband package. I was over the moon. Sure enough, the next day, my BT Business Hub turned up, and I connected to 4G.

But it was nowhere near the promised speed, and this turned out to be the beginning of a string of broken promises and poor customer service. Communication was terrible, they ignored support requests, and even sent me products I hadn't purchased! In short, their product and associated customer service didn't live up to the promises made by the sales team.

Had the salesperson lied to me? Probably not. They were simply selling a product that they had been told was available. The problem was in the company's ability to deliver that product.

BT is a big company, made up of many departments, and the product I had ordered involved many of those departments working together, which they failed to do. From the finance department invoicing me multiple times, to the installation team turning up on the wrong day, the whole experience was a mess because of the complexity of the organization and the product they were selling.

The result of this disastrous experience was me publicly complaining about them on social media and even writing a negative review of them on my website. My complaints online, along with many others, will make other prospective customers think twice, forcing BT to work all the harder to encourage users to sign up. So how do we prevent these problems from happening to us?

Start by Mapping the Experience

The answer lies in mapping the customer experience from beginning to end. As I said in chapter 4, customer journey mapping is a powerful tool in understanding the user and for planning your sales funnel. You need to take the time to consider every step the customer will go on, from first recognizing their need for what you have to offer, all the way through to receiving and using that offering.

For each of those steps, you need to plan how you will engage with them to address their questions, concerns, and tasks. You need to work out what channels you will use to achieve this and who within the company is going to support these steps in the journey. Most importantly, you need to plan how these different channels and teams will work together to deliver. An increasing number of companies are appointing chief customer officers to provide this kind of oversight and ensure a streamlined and integrated experience.

Most importantly, you need to plan how these different channels and teams will work together to deliver. An increasing number of companies are appointing chief customer officers to provide this kind of oversight and ensure a streamlined and integrated experience.

I am aware that this kind of work might be above your pay grade. If you are a designer or marketer in a larger company, you will not be able to influence these kinds of large-scale decisions. Nevertheless, it is vital that you are aware of and can communicate with colleagues about these broader issues. That is because if you do not make it clear to management that there are other factors in play, you will be the one blamed when the website fails to convert!

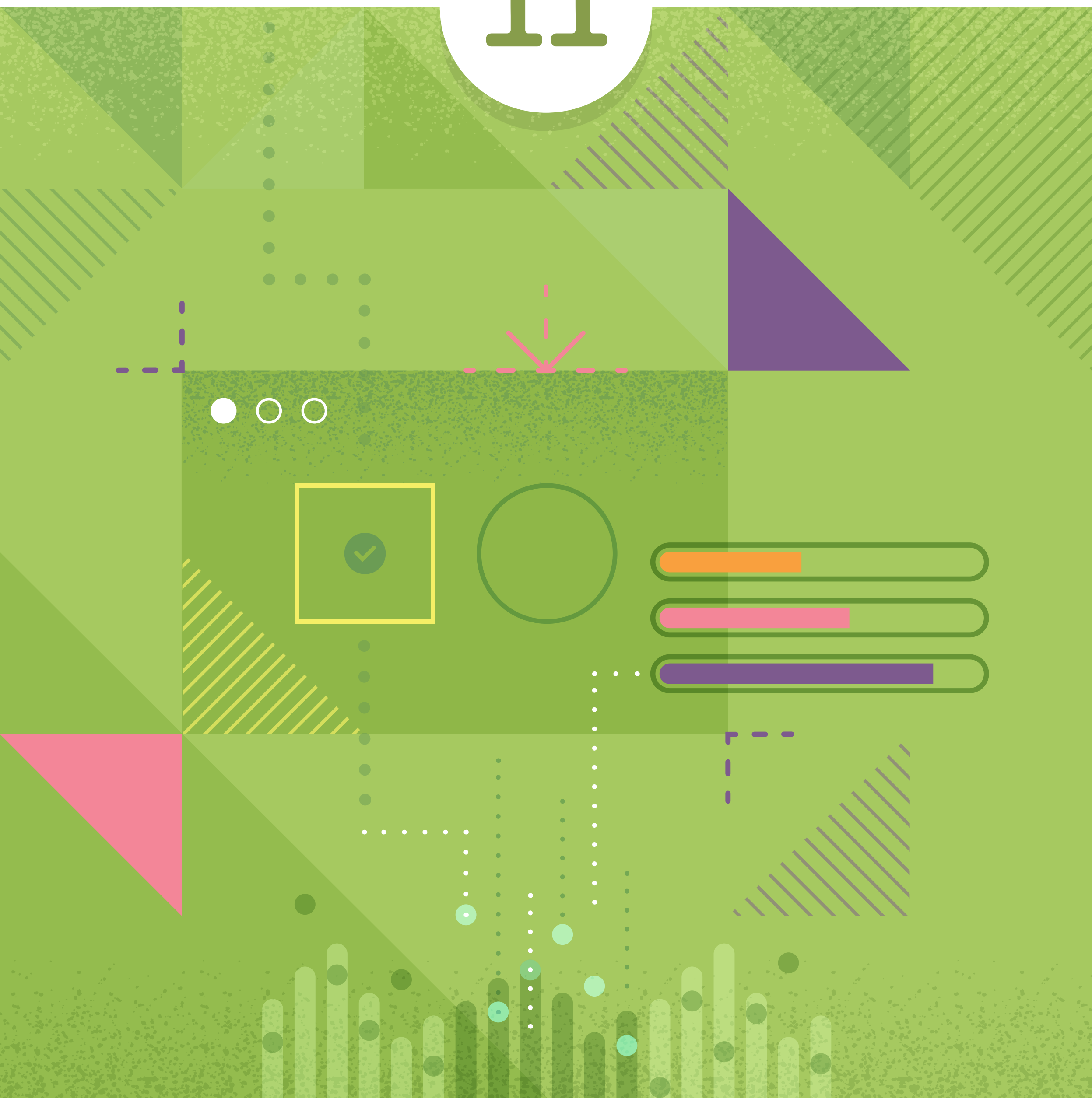
Those of you who work in smaller organizations will have more influence in these areas, and the problems will not be as pronounced because there will be a tighter, smaller team. That gives you a competitive advantage that you must look to use. While large companies struggle to create and deliver on a compelling offering, you won't, and that will allow you to compete even when faced with better-resourced competitors. At a smaller company, you are in a better position to influence organizational culture. You can encourage user-centric thinking and an emphasis on customer service, transparency, and honesty that bigger companies have often lost sight of.

That said, looking at the broader picture isn't necessarily the best first step in your journey to encouraging clicks. With that in mind, as I wrap up this book, I want to leave you with somewhere tangible to begin.

Where to Go From Here?

CHAPTER

11



CHAPTER 11.

Where to Go From Here

Although every person reading this book will be in a different place on their journey to improve conversion, it wouldn't surprise me, when you put this book down and return to your day job, it will leave you feeling somewhat overwhelmed and frustrated.

You see, we authors make everything sound so easy. We lay out principles and methods, promising they deliver results. But, as with so many things, the challenge is in the implementation.

If you are relatively new to the topics I have discussed in this book, you will probably feel unsure where to start. We have covered so much ground in these pages, that knowing where to begin can feel overwhelming. Also, you may have read this book and found my suggestions convincing, but your colleagues, clients, and managers have not. You may well meet a lot of resistance to implementing some of the ideas outlined here. Especially those around testing, iterating, and monitoring your website.

People prefer quick answers and easily implemented design techniques over the hard work of optimizing and improving a website based on testing. If you approach management and immediately ask them to integrate regular testing, you may hit a brick wall. Instead, you need to start by proving the value of the techniques we have discussed.

Start With the Quick Wins

To prove the value of the advice in this book, you need some quick wins. Some fast, small improvements you can make that show the benefit of optimizing your websites to management.

To do that you need to be able to measure success. There is no point making improvements to the site until you have a mechanism to measure whether those improvements work or not. Chapter 2 should help with that.

I hope this book has given you some immediate design and copy suggestions that will quickly improve your website. I highly recommend you begin with these. Chapter 5, on objection handling and risks, is an excellent place to start for improving your copy, while the section on cognitive load (chapter 7) should help with the design. If you haven't done any work on improving conversion in the past, chances are there are numerous simple suggestions in those chapters that you can quickly implement on your website. Whatever the case, these are a good starting point because they will quickly have a positive impact on conversion, and show colleagues and management that your approach makes a real difference.

You might be amazed at the difference you will be able to make immediately, and that is sure to impress others. The results may prove so useful that they are in danger of setting false expectations. In the early days, you will find a lot of things on your site that can be improved, and that will have a significant positive impact on your conversion rate. However, as you fix these issues, it will be harder and harder to maintain the same level of growth. As a result, it is essential to manage stakeholders expectations right from the outset. If you do manage to make a lot of big early wins, make it clear that this won't last.

If your early success is more modest, don't be demoralized. It will probably just mean that your site was in a better place than you expected.

If your early success is more modest, don't be demoralized. It will probably just mean that your site was in a better place than you expected. When improvements in conversion become slow progress, it is time to start adopting some testing. However, don't try to implement a significant testing programme from day one. Once again, this will create resistance. Instead, start with something more modest.

Try Some Budget Testing Techniques

If you haven't done much in the way of testing before, it will take time to win over others. You will need to show them that the time and effort required is worth it. That means starting small.

The best starting point is to suggest quick-and-dirty testing to resolve disagreements or provide a breakthrough when people are unsure how to proceed. For example, people often disagree over design direction, so suggest testing to them. Perhaps a tool like UsabilityHub can help, as it allows you to test a design mock-up and get results within a couple of hours for minimal effort and cost. If that goes well, maybe consider some remote, unfacilitated testing of a prototype – or even your existing website. A service like UserTesting handles the recruitment and recording for you. All you need to do is set up the test.

By this point, colleagues should begin to see the benefit of testing, and you might want to consider running an in-house, in-person test with a handful of participants. Invite colleagues to watch, and record the sessions, making sure you capture the screen as well as the participant's voice and face. You can then distribute a highlights reel to those who couldn't attend.

You will be amazed at how watching real users struggle with your website is a wake-up call for even the most reticent of colleagues, which is especially useful if you currently have dark patterns on your website that you would prefer to remove. When colleagues see how frustrated and angry users get about them, they will view things very differently.

At this point, you will probably find you can start to get more ambitious.

Get More Ambitious With Regular Optimization

Once people see the value of usability testing, you can start to integrate it into your usual working practices by running a regular monthly session. By combining this kind of qualitative testing with quantitative data from analytics and heat maps, you will begin to uncover more nuanced problems with your site.

The aim now becomes to establish a program of identifying problems, proposing solutions, and testing those approaches. That is where you can start to introduce A/B testing alongside usability testing.

Remember that improving conversion comes down to systematically removing barriers that prevent users from taking action. In the early days, there will be clear barriers to overcome, such as long load time or easy to miss calls to action. Over time, however, barriers will become more challenging to identify and address. They will be intrinsic to the offering itself, not just the website. You will only identify them by having clear metrics coupled with an overview of the entire customer journey.

Fortunately, by the time you reach that stage, there should be a more mature organizational understanding of conversion optimization, as you lead the company step by step on that journey. You won't solve all of the problems overnight. But if you start small and evolve both your site and working practices gradually, you should be able to maintain steady growth in users taking action for years to come.

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Smashing Media, 2017

Digital Adaptation
Smashing Media, 2014

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- *Inclusive Components* by Heydon Pickering
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The world is a miracle. So are you.

Thanks for being smashing.

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Paul Boag has been working in the web since 1993. He is a user experience strategist who helps companies make use of digital to better serve connected consumers. Paul also hosts the award-winning user experience podcast at **boagworld.com**. He is a regular speaker at conferences and author of four other books including *Digital Adaptation*.

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