GUIDE FOR

OPTIMIZING YOUR WEBPAGES

& BETTER SERVING YOUR CUSTOMERS

A REPEATABLE METHODOLOGY & APPROACH TO GUIDE YOUR MARKETING
DEVELOPED FROM 20 YEARS OF RESEARCH

MECLABS INSTITUTE | PARENT ORGANIZATION OF MARKETINGSHERPA

A REPEATABLE METHODOLOGY FOR

OPTIMIZING YOUR WEBPAGES EMAIL AND ADS

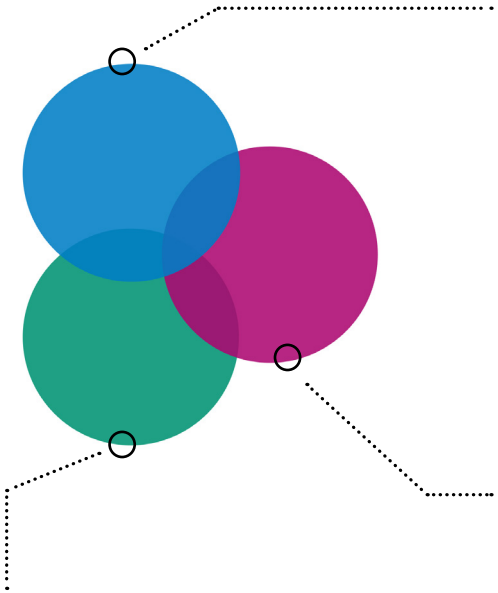
3 PATENTED HEURISTICS TO GUIDE YOUR MARKETING
DEVELOPED FROM 20 YEARS OF RESEARCH

MECLABS Institute

PARENT RESEARCH ORGANIZATION OF MARKETINGSHERPA

If you've been a MarketingSherpa reader for a while or have attended Summit before, you may have heard of MECLABS Institute — the parent research organization of MarketingSherpa and MarketingExperiments.

Let me explain how all three work together & can help you improve your marketing.



MECLABS INSTITUTE

Houses education programs and research services and is dedicated to discovering how people make choices. Explore the online certification and Research Partnerships that help marketers improve their initiatives.
MECLABS.com/Resources

MARKETINGSHERPA

Focuses on inspirational case studies of marketers overcoming challenges. Read case studies from marketers like yourself or submit your own success stories to be featured at MarketingSherpa.
MarketingSherpa.com/Campaign

MARKETINGEXPERIMENTS

Focuses on constant testing and optimization in order to share important new discoveries with all marketers. Explore various testing and optimization efforts that can be applied to your campaigns.
MarketingExperiments.com

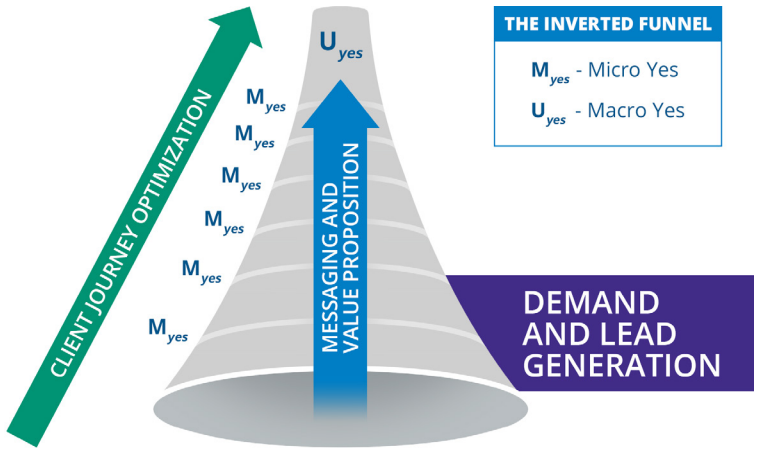
Understanding

HOW AND WHY CUSTOMERS SAY "YES"

The 20 years of research conducted by our team of data scientists has reshaped and validated our approach to the consumer decision-making process.

- Our research shows that we must provide value and get a "yes" at each micro-decision, or it will be a "no" at the final macro-decision.
- Through customer research and testing, we can define the customer thought sequence on the path to conversion and optimize that sequence, which results in more people saying "yes."

"**People are not falling into our funnel**; they are falling out. We therefore need to see the funnel in a new way — the funnel itself must be inverted."



Three Heuristics

TO HELP YOU OPTIMIZE YOUR PAGES, EMAILS AND ADS

MECLABS Institute has developed 10 patented heuristics, or thinking tools, to help organize one's thinking and analysis of a given product offering, marketing message or experimental design.

- These heuristics are not equations to be solved. But rather, they are thought tools (kind of like checklists) to guide your thinking as you optimize your advertising, email and websites.
- The more you improve the elements on the right side of the equation, the more you will be able to increase the effectiveness of your ads, email messaging and website conversion.



1. Effective Ad Heuristic

Achieve qualified clicks by grabbing attention, generating interest and having a clear ask.

EA = 2at + i + as

2. Email Messaging Heuristic

Optimize positive forces of your email and minimize negative forces to drive more traffic to your website.

EME = rv (of + i) – (f + a)

3. Conversion Sequence Heuristic

Once visitors arrive on your website, maximize your success rate with the Conversion Sequence Heuristic.

C = 4m + 3v + 2(i-f) - 2a

Effective Ad Heuristic

3 COMMON MISTAKES MARKETERS MAKE WITH THEIR ADS

MISTAKE #1. The ad doesn't attract attention

As I mentioned earlier, the first objective your ad must fulfill is **attracting attention (at)**. You'll see the importance of this by looking at the coefficient of 2 used with the "attract attention" variable. Attracting attention bears the most weight in the sequence because if visitors don't notice your ad, then little else will matter.

EA = 2at + i + as

- 1. Size
- 2. Shape
- 3. Color
- 4. Motion
- 5. Position

There are five relative differentials you can use to help your ad stand out against other elements on a page.

Remember, less can be more. If you emphasize your ad using all of these differentials, you are essentially emphasizing nothing at all.

Use of color to attract attention



MISTAKE #2. The ad lacks enough value to generate interest
So you've gotten your customers' attention, but why should they click? You build **interest (i)** through value.

EA = 2at + i + as

Every action you ask a prospect to make must have a value proposition. This is what we refer to as a process-level value proposition. Think of it like this:

"Why should my ideal prospect **click this banner ad** rather than any other element on the page?"

There are four elements you can evaluate to measure the force of a value proposition:

- Appeal – How badly do I want this offer?
- Exclusivity – Where else can I get this offer?
- Credibility – Can I trust your claims?
- Clarity – What are you actually offering?

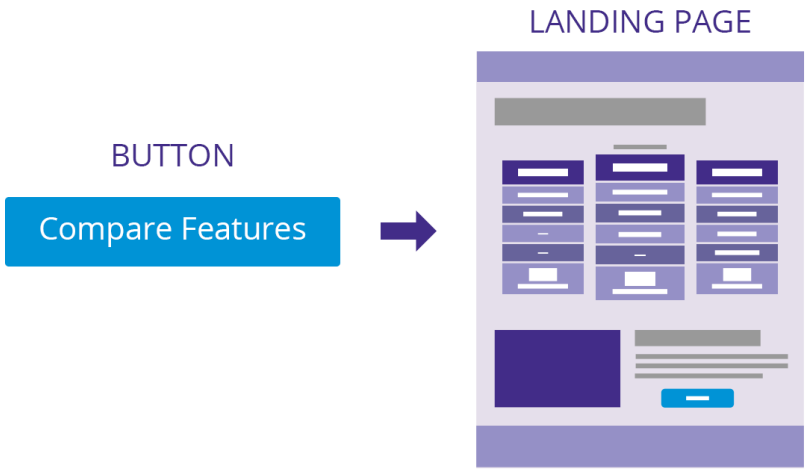


MISTAKE #3. The ad doesn't ask for the click … the right click
Many marketers and designers become so wrapped up in the design of the ad that they overlook a critical piece: **"the ask" (as)**.

EA = 2at + i + as

You need to make sure you're asking for the click, whether it's implied or direct. Also, you must ensure visitors know what they're getting in exchange for the click. Will they be able to learn more? Buy now? Use your call-to-action to set visitors' expectations.

But, it's not about just any "ask." You need to know where visitors are in your purchase cycle so you can match "the ask" to the motivation of the ideal visitor.



If customers are new to your company or product, they might still be in the research phase.

- That means an ad asking them to "buy now" could result in no click.
- However, an ad that asks them to "learn more" addresses the needs the visitor has concerning your product or service.

To learn more about how you can engage with MECLABS, **visit MECLABS.com/Partners**

Email Messaging Heuristic

POSITIVE FORCES THAT IMPACT EMAIL MESSAGING EFFECTIVENESS

On the positive side, you must ask yourself, "How **relevant (r)** is my email to my customer? How valuable is the **offer (of)**? How strong is the **incentive (i)** to take action?"

$$EME = rv(of + i) - (f + a)$$

This is why target audience testing is so effective. What is relevant and valuable to one customer on your list might not be to another customer.

By better targeting your offers and incentives to tap into what different segments of your list find relevant and valuable, you will improve the effectiveness of your email messaging. Testing can help inform this process.

Five Ideas to Increase your Emails' Perceived Value

1. Turn your email into a personal note, not a promotion
2. Personalize subject lines
3. Implement personalized send times (for example, one send time might work differently for @gmail.com and @company.com)
4. Provide personalized content in purchase confirmation emails
5. Write copy that connects to the recipient's problem and create suspense that you have the answer on a landing page.

NEGATIVE FORCES THAT IMPACT EMAIL MESSAGING EFFECTIVENESS

Those positive forces drive your customer to act. You can think of them like the propulsion of an airplane. But much like drag, negative forces, the **friction (f)** elements of the process and **anxiety (a)** about providing information, discourage your customer from converting.

$$EME = rv(of + i) - (f + a)$$

EXAMPLE #1: Friction caused by excessive calls-to-action
This email had the following subject line : *Fares from $39* are so low, you just have to go*

- At first, recipients will be excited that this company is presenting such a great offer.
- However, when they open and scroll for the $39 deal, they must work hard to find it.
- In fact, the $39 deal was the 40th call-to-action in the email.
- Scanning through 40 offers and 40 buttons creates both difficulty and length-based friction for the recipient.



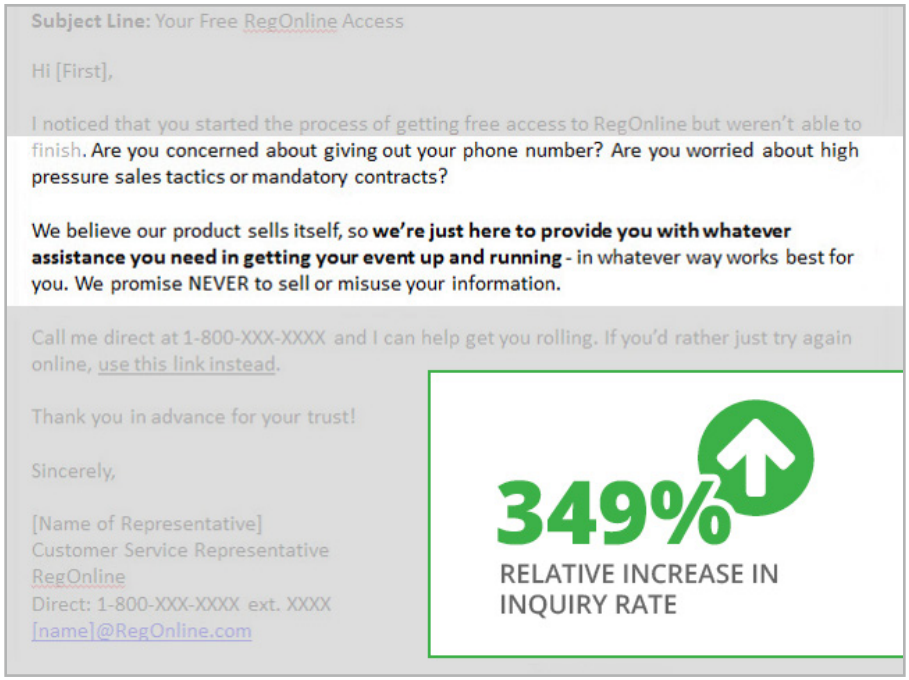
EXAMPLE #2: How to use email tone to alleviate anxiety in your sales process
Active Network, a large event management software provider, partnered with MECLABS Institute to increase its conversion and free trial sign-up rates.

Our analysts hypothesized that:

Hypothesis

Visitors are not converting because of high anxiety due to phone spam and high-pressure salesmen.

To alleviate this hypothesized anxiety, they tested an abandonment email that directly addressed this issue:



Conversion Sequence Heuristic

PROVEN APPROACH TO IMPROVING YOUR WEBPAGES AND PURCHASE PROCESSES

Determining the elements in your conversion process to test and optimize can be challenging. The MECLABS Conversion Sequence Heuristic provides a framework of five factors on which to focus your optimization energy.

- It brings discipline, rigor and sustainable success to the marketing department.
- It's a patented, repeatable methodology (patent number 8,155,995).
- It's based on years of testing and research of real product and service offers presented to real customers.

$$C = 4m + 3v + 2(i-f) - 2a$$

Conversion – Strategy is better than skill
Optimization doesn't start with the Conversion Sequence Heuristic. It starts with determining the best objective — what is the right "macro-yes" to apply your resources to? Once you've answered this, the heuristic is a way to answer the next question: "What is the best way to achieve the objective?"

We call this thinking Q1 and Q2.

Q1 *What is the best objective?*

Q2 *What is the best way to achieve the objective?*

$$C = 4m + 3v + 2(i-f) - 2a$$

Motivation – Who are you optimizing for?
The numbers in front of the different elements of the heuristic indicate how much they impact the probability of conversion. All of the elements do not hold equal weight. The motivation of the user (m) is the single most important factor affecting conversion.

Motivation of the user is also the only element of the Conversion Sequence Heuristic that you cannot change. It is intrinsic to your potential customers.

You can, however, gain an understanding of your potential customers' motivations to better tap into those natural motivations and better serve your ideal customers while improving conversion.

Five Questions to Ask to Understand Motivation

1. Where is your customer in the thought sequence?
2. Where is the traffic coming from?
3. What conclusions do your prospects need to make before buying?
4. What are their pain points?
5. What do they value?

Once you've removed friction & anxiety and increased the force of your value proposition, you can use motivation to maximize the effectiveness of your marketing message with segmentation.



Maximize your optimization efforts by leveraging data to identify the motivation of your prospects.

METRICS THAT OFTEN INDICATE AMOUNT OF MOTIVATION

Conversion Rates
If conversion rates are high in general, it indicates a high degree of motivation. Also, if conversion rates are minimally impacted by significant changes, it indicates a high amount of motivation.

Clickthrough Rates
Like conversion rate, a high clickthrough rate can also indicate high motivation. However, excessive clicks can also indicate confusion.

Average Order Value
Beyond conversion and clicks, a higher average order (or donation) value often indicates a high degree of motivation.

Price Elasticity
If conversion rates are minimally impacted when price is raised, it also indicates a high amount of motivation.

Channel Exposure
If the source of your traffic indicates awareness of previous marketing exposure/brand awareness, it often indicates a high amount of motivation.

METRICS THAT OFTEN INDICATE NATURE OF MOTIVATION

Clickthrough Tracking (Next-page Reports)
Knowing which page customers clicked to can indicate which content is most in line with their motivation.

Channel Source
Knowing the page or pages that customers are coming from can often indicate what is motivating them.

Time-on-page
Often noticing how long a visitor spends on a particular page can provide insights into what is motivating them in particular. Beware that a high time-on-page can also indicate confusion.

Event Reports
Setting up tracking on particular actions (like watching a video) enables you to understand the nature of the customer s' motivation by observing what they did (or did not do) on the page.

Return Frequency Percentage
Knowing how many times the visitor has come to a particular page (possibly even prior to converting) is helpful in understanding the nature of their motivation.

Every action customers take in response to a given marketing message is a window into two key aspects of their motivation:

AMOUNT – How much are they actually motivated?

NATURE – What is actually powering their motivations?

$$C = 4m + 3v + 2(i-f) - 2a$$

Value Proposition – Maximize the force of your perceived value
Your value proposition is the answer to the question, "If I am your ideal prospect, why should I buy from you rather than any of your competitors?" This requires you to differentiate from the value propositions of competitors.

There are four elements that increase or decrease the force of your value proposition:

APPEAL	How badly do I want this offer?
EXCLUSIVITY	Where else can I get this offer?
CREDIBILITY	Can I trust your claims?
CLARITY	What are you actually offering?

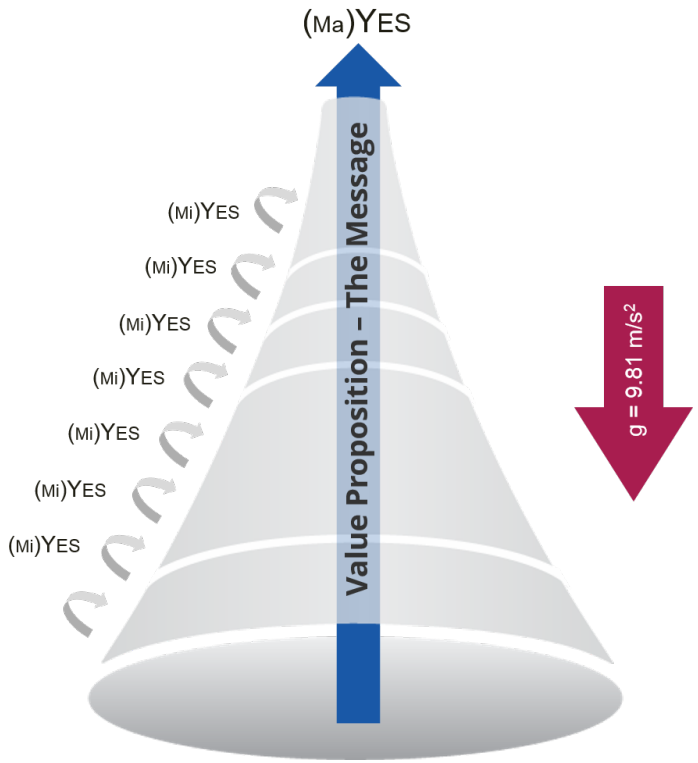
Where "appeal" and "exclusivity" meet is your "only-factor." Marketers can improve their messaging efforts by clearly communicating (clarity) the "only-factor."



VALUE PROPOSITION AS THE FUNDAMENTAL FORCE

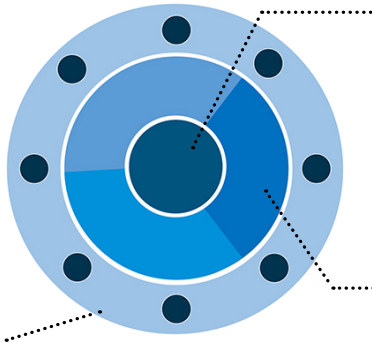
Value proposition is the fundamental force powering your prospects up the sales funnel.

People don't make a single decision. They move up the funnel through a series of smaller decision points that require them to say "yes." These are micro-yes(s). If at any point along the process your potential customer says "no," you will not achieve your goal.



At each decision point, or micro-yes juncture, your prospects are weighing the perceived value of the action you're asking them to take versus the perceived cost.

THE VALUE PROPOSITION SPECTRUM



PRIMARY VALUE PROPOSITION

Question: If I am your ideal prospect, why should I buy from you rather than any of your competitors?

PROSPECT VALUE PROPOSITIONS

Question: If I am [PROSPECT A], why should I buy from you rather than any of your competitors?

PRODUCT VALUE PROPOSITIONS

Question: If I am [PROSPECT A], why should I buy this product rather than any other product?

To have the most powerful value proposition, you have to develop derivative value propositions:

- Prospect-level Value Proposition
- Product-level Value Proposition
- Process-level Value Proposition

It is necessary to create a robust value proposition that addresses every stage of the sales process so that prospects quickly and easily move through it.

Every request made of prospects in the sales funnel must be supported by its own value proposition because prospects are asking themselves, consciously and subconsciously, whether it's worth their time and effort to move forward.

$$C = 4m + 3v + 2(i-f) - 2a$$

Incentive and Friction – A psychological resistance to a given element in the sales process
In any conversion process, there are cost factors that go beyond the actual money spent on a product or service. Friction is one of the cost factors (indicated by the minus sign in front of the letter "f" in the Conversion Sequence Heuristic).

Friction is the "aggravation factor," or the hoops the customer must jump through to complete the conversion goal — everything from a large number of form fields to long shopping cart processes. Friction in the sales process consists of two components:

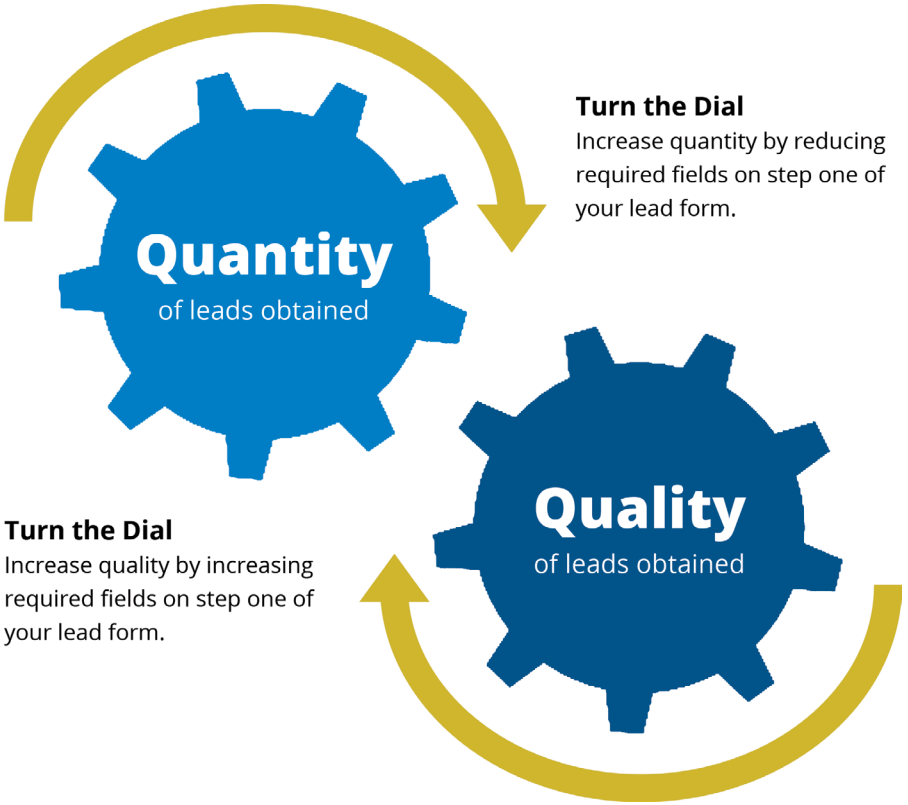
Friction = Length + Difficulty

Length-related friction: relates to fatigue, irritation or aggravation caused by forms or processes that ask for more time or information than feels reasonable to the prospect

Difficulty-related friction: the result of website elements that cause confusion or require an undue amount of effort to complete, such as asking for a spouse's driver's license number

USING FRICTION TO YOUR ADVANTAGE

Length-oriented friction can be used to control the quantity and quality of the emails or leads you capture.



Turn the Dial
Increase quantity by reducing required fields on step one of your lead form.

Turn the Dial
Increase quality by increasing required fields on step one of your lead form.

WHEN TO USE INCENTIVE

Incentive is a positive element in the heuristic that is used to offset any friction that you cannot eliminate. The key to incentive is choosing one with a high Perceived Value Differential (PVD) — the difference between the perceived value of the incentive and the actual cost of the incentive.

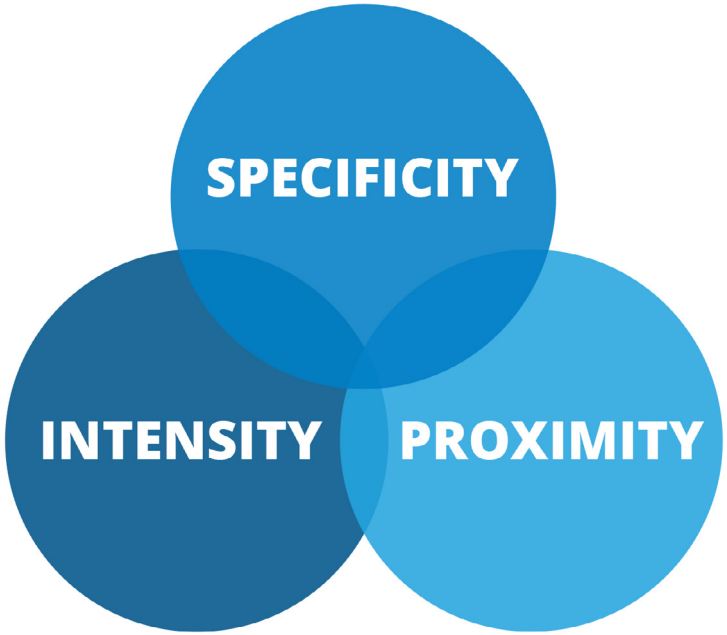
C = 4m + 3v + 2(i-f) - 2a

Anxiety – A psychological concern stimulated by a given element

Anxiety is just as lethal to conversion as friction.

Anxiety is the concern ideal prospects have that the checkout process might not be secure or that your product might not actually deliver on its promises. Anxiety can stop website visitors in their tracks — the back button makes it ultra-easy.

If you think about mitigating anxiety in rational terms, you are likely to fail in your efforts. Though anxiety often is stimulated by a legitimate concern, its degree/impact is often disproportionate to the measure of risk.



THERE ARE THREE DIFFERENT LEVELS YOU CAN SEEK TO RELIEVE OR CORRECT ANXIETY:

Specificity

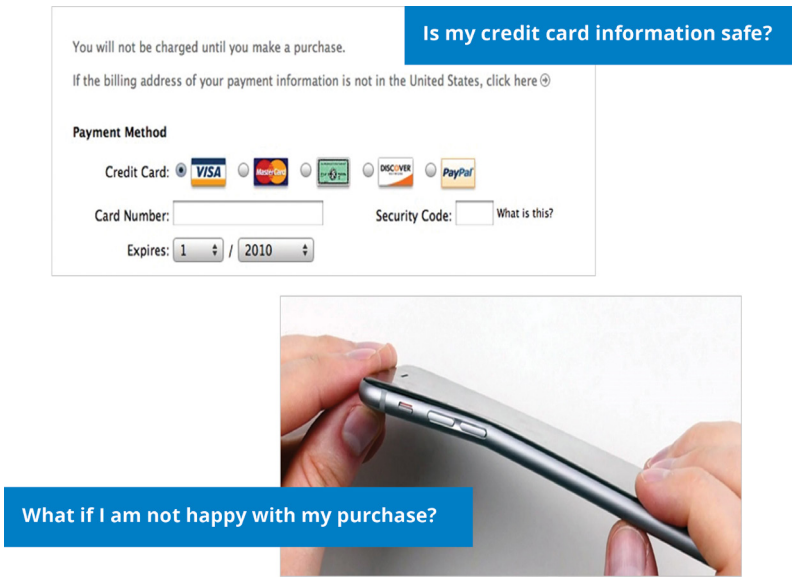
In order to counteract customer anxiety, you must first identify the source of the anxiety and effectively address each concern. Depending on the website, different sources of anxiety will arise for the visitor. The source may be quality, reliability, price, security, etc.

Proximity

After you've found a way to specifically address every source from which a customer could experience anxiety, you have to figure out where to place these anxiety reducers on your page. Proximity is about placing the corrective measures you formed with specificity in places where a visitor will experience them simultaneously with the source of anxiety.

Intensity

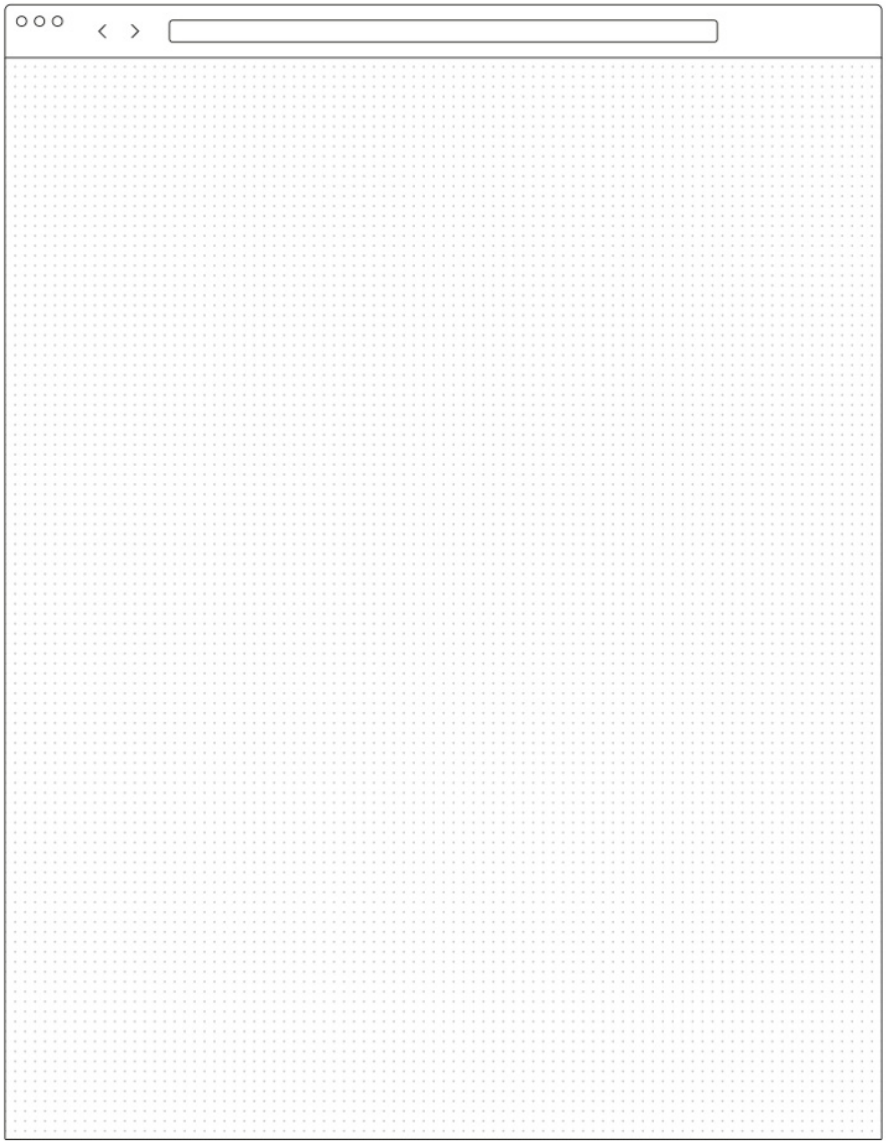
The intensity level of corrective measure must address two things: the substance and the perception of the concern. The substance requires you to address the rational foundation of an anxiety source on a realistic view of risk.

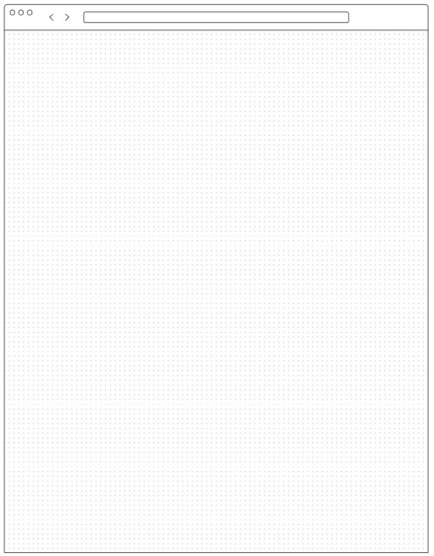


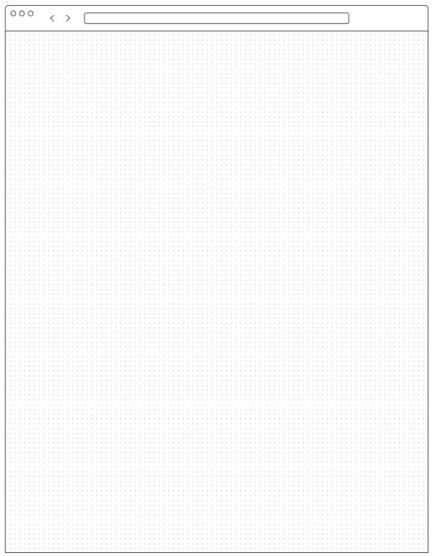
Wireframe Templates

PRACTICE APPLYING A HEURISTIC

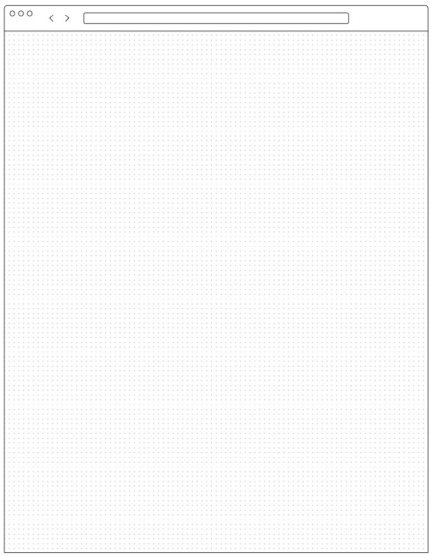
Use the wireframe templates to practice applying a heuristic discussed in this section. Practice on anything, like a landing page, an email or an ad.

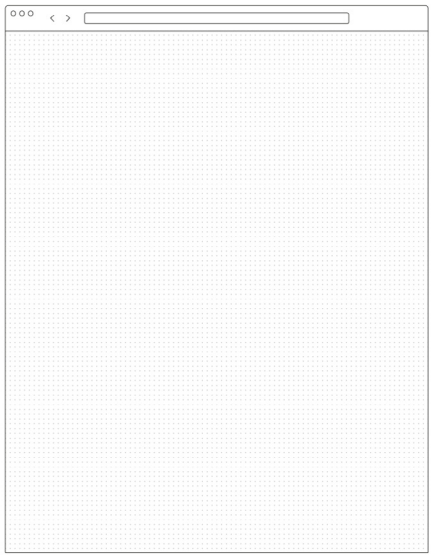






C = 4m + 3v = 2(i-f) - 2a





IMPROVE YOUR CONVERSION RATES

& BETTER SERVE YOUR CUSTOMERS

ENGAGE IN A CUSTOM, DATA-DRIVEN
RESEARCH PARTNERSHIP WITH MECLABS

FELLOW MARKETER,

In 2002, I developed the Research Partnership model as a way to fund our growing library of case studies and experiments. I recognized that it would be difficult to raise research funding from foundations and universities. The approach is problematic at best. Instead, it seemed more cogent to find a way to finance our ongoing research in the commercial sector.

It occurred to me that we could pay for the research out of its own ROI. Funnels everywhere are leaking revenue. If we could, more or less, "plug the leaks," then we could essentially finance our research with "found money." It was, in economic terms, a virtuous circle.

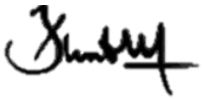
Out of that program, we began a Research Partnership with the New York Times. For 12 continuous years, we tested and optimized its digital offerings. We learned, and they grew. Today, digital revenue for the Times has surpassed the five-hundred million mark.

Every year, we receive a multitude of applications for the Research Partnerships. We are unable to accept many of these companies into our program. Nevertheless, we are constantly hunting for the right fit. When we select the right Partner, it is truly a win–win situation. If you are interested in finding out more about how we structure these Partnerships, please visit this site: **MECLABS.COM/PARTNERSHIP**

In the meantime, we are grateful for your trust. Even if our organizations never develop a Research Partnership, we want to continue to provide you with the findings of our work. Most importantly, we want to do everything we can to help you succeed.



Thank you,



Flint McGlaughlin
Founder & Managing Director

Participate

IN A RESEARCH PROJECT AND DRIVE CONVERSION INCREASES

By creating a customer-first science based on the cognitive psychology of conversion, MECLABS Institute has been able to help companies — ranging from startups to Fortune 500 companies — improve conversion and better serve customers.

We are looking for companies focused on finding out why customers say "yes" in the areas such as subscription, lead gen, nonprofit and ecommerce. Research Partners work with our scientists to make new discoveries and drive significant increases across their funnel.



Many of our partners see triple-digit sales increases.

- Do you know why prospects should buy from you instead of a competitor?
- Do you believe you've maximized your online conversion rate?
- Can you identify where prospects could be dropping out of your online sales process? Do you know what to do about it?

MECLABS was created to answer questions like these using a methodological approach to behavioral testing of customer interactions during our Research Partnerships.

How does a Research Partnership work?

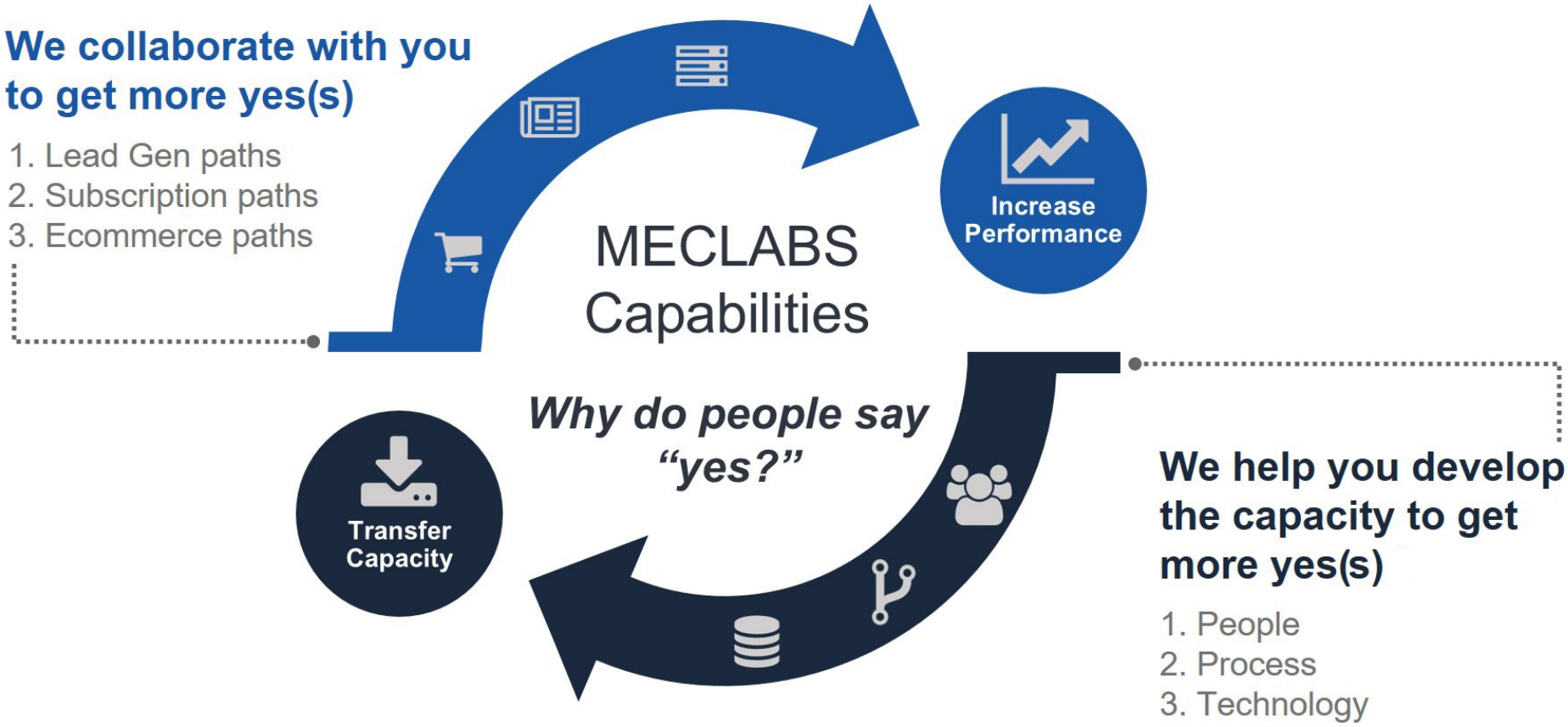
A Research Partnership is a shared responsibility and commitment to scientifically discovering how to optimize the customer journey across all touchpoints — websites, call/chat centers, advertising, email, direct mail and retail.

Essentially, we create a micro-research lab inside your group and then conduct R&D to improve your marketing results. Companies often invest in R&D on the product side but rarely on the marketing side, so their marketing efforts suffer from under performance.

People climb up the funnel through a series of smaller decision points that require them to say "yes." These are micro-yes(s). If at any point along the process your potential customer says "no," you will not achieve your goal.

Our scientists use MECLABS 10 patented heuristics — a repeatable methodology for offer-response optimization — to determine why a customer says "yes" in your sales and marketing funnel.

MECLABS scientists document these findings for Research Partners in a Test Protocol System that brings discipline to the behavioral testing process. This enables us to transfer capacity and customer wisdom to your team.

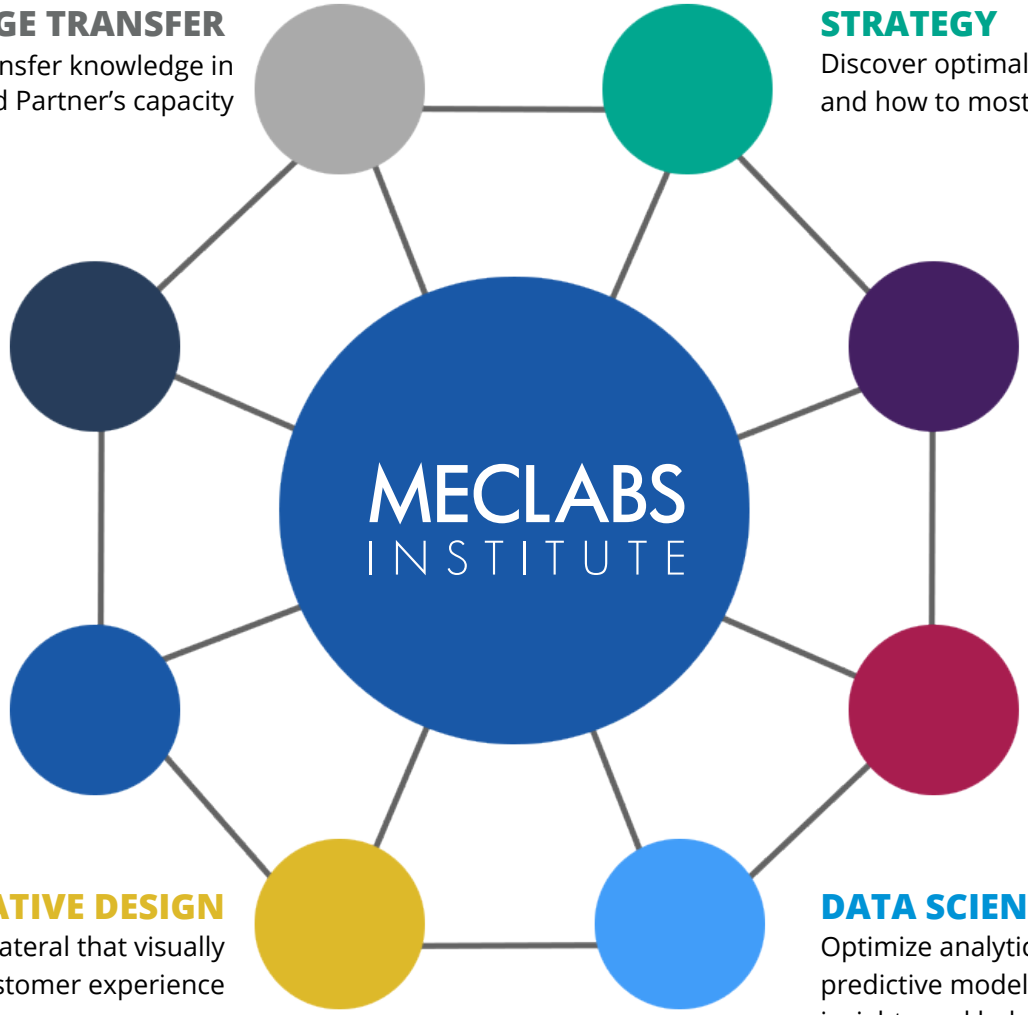


MECLABS Becomes Your Own Custom Research Lab

KNOWLEDGE TRANSFER
Systematically transfer knowledge in order to build Partner's capacity

STRATEGY
Discover optimal positioning for products/services and how to most effectively deliver to customers

TECHNOLOGY INFRASTRUCTURE
Bypass technical hurdles by hosting or working directly in Partner's digital environment to execute digital marketing optimization



CUSTOMER RESEARCH
Determine the major reasons customers say "yes" and how to integrate the research into Partner's marketing

PROJECT MANAGEMENT
Manage all projects end-to-end for the fastest possible turnaround times

MARKET INTELLIGENCE
Uncover Partner's unique position in market, as well as any new/ missed market opportunities

CREATIVE DESIGN
Create marketing collateral that visually enables the optimal customer experience

DATA SCIENCE
Optimize analytics infrastructure and create predictive models that glean customer insights and help prioritize opportunities

To learn more about how you can engage with MECLABS, **visit MECLABS.com/Partners**

MECLABS Optimization Process Overview

DISCOVER

Launching a Partnership with a Data-driven Approach

A successful Design of Experiments and business plan must be built on a solid foundation. We conduct discovery analyses to answer the following questions:

Technical Capacity

What is the best approach to testing? Your platform or ours? Is your analytics program set up correctly? How do we set up a testing program swiftly and efficiently?

Financial Analysis

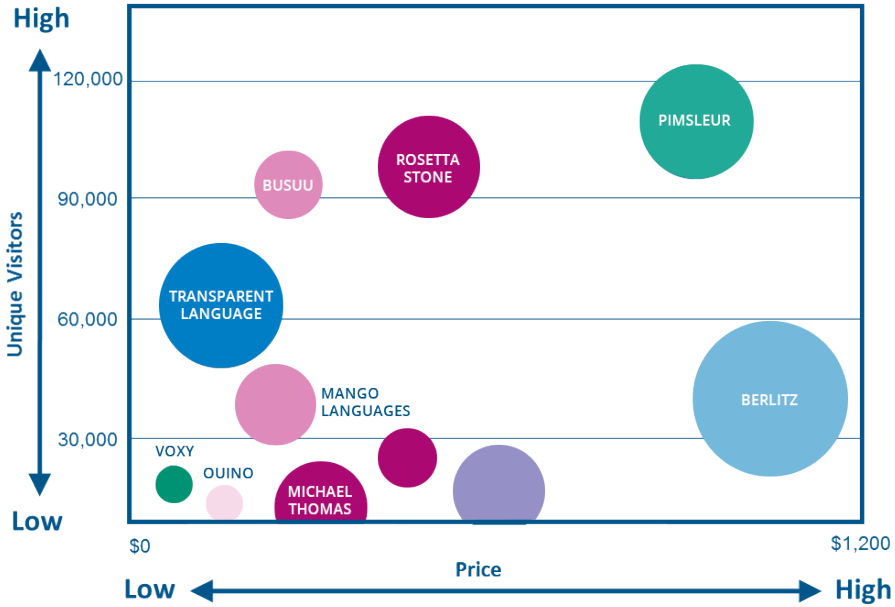
Where is the best opportunity for success? If we achieve a conversion lift on a particular funnel or campaign, what does that mean in terms of revenue? A 10% lift may be much more impactful in one area than a 100% lift in another.

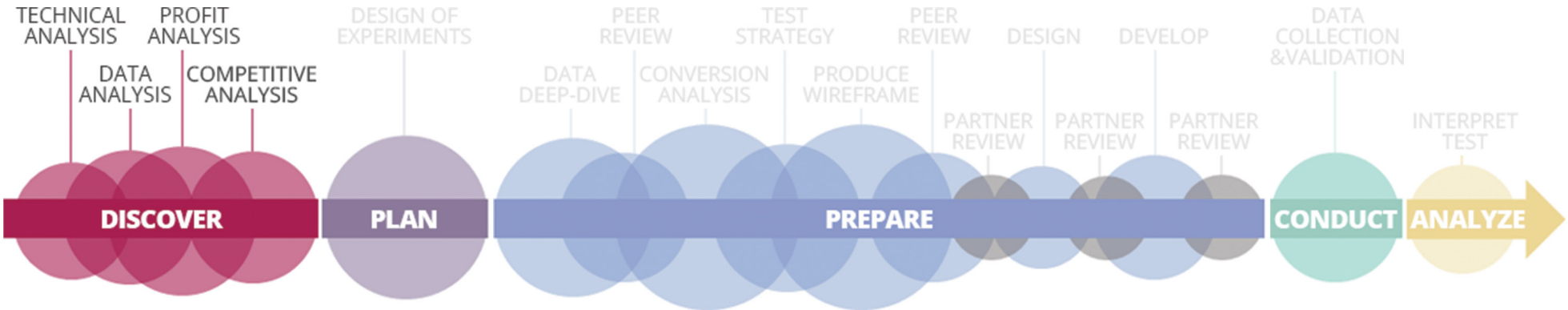
Data Analysis

What are the response rates at micro-yes decision points for your various digital paths/campaigns? How can we translate "how much" data into "why so" customer wisdom?

Competitive Analysis

What companies are competing for the same attention, interest and clicks as you? How do they express their value proposition? And how does that compare to yours? What are they not doing that we can take advantage of?





To learn more about how you can engage with MECLABS, **visit MECLABS.com/Partners**

PLAN

Build a Design of Experiments

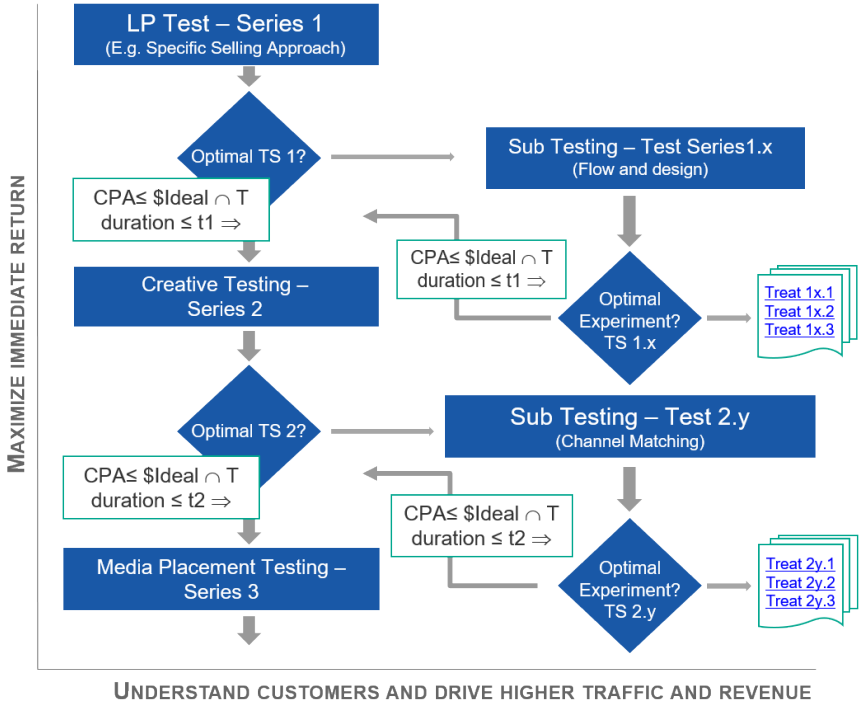
With discovery complete or at an adequate level to proceed, we take all of the contributing elements that have been organized to build out the Design of Experiments.

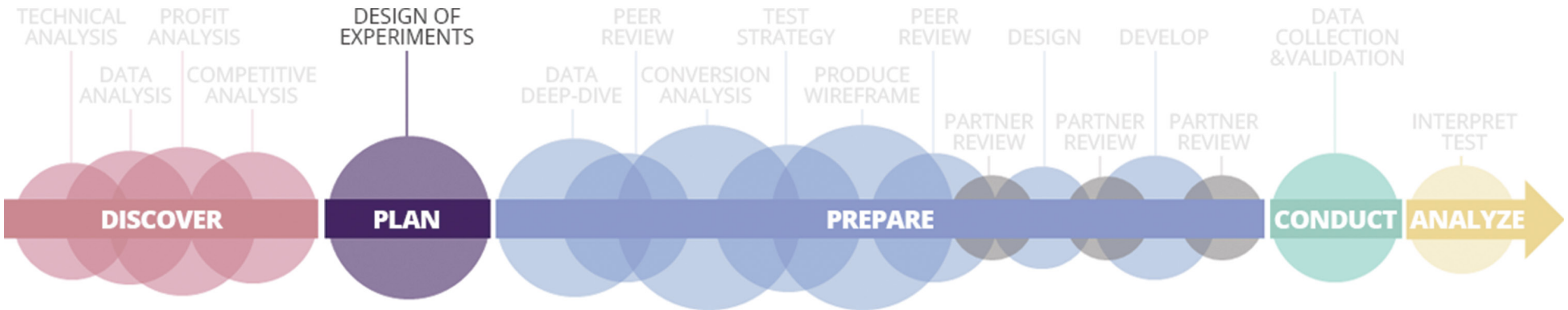
This serves as the blueprint to prioritize and sequence the initial set of activities to ensure you capture the most impactful gains (monetary and customer insights).

The experimental design will serve as a guide for where to test, what to test and what to ask. This enables us to build an accurate customer theory that is compounded with each test result.

It balances the resources to execute the initiatives against the impacts they will generate for your business. As activities are conducted and completed, the discoveries are used to update the plan in order to maintain a high level of utility from the subsequent initiatives while considering the recent developments in your business.

The Design of Experiments is strategically prioritized to maximize both speed and impact, balancing estimated IT and conversion impacts.





PREPARE

Execute with a Proven, Methodical Approach

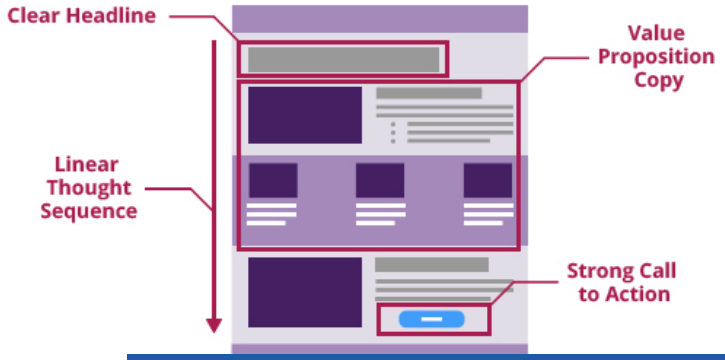
After deciding where to focus experimentation, we determine which elements in the customer experience should be added, removed and changed. Every experiment is centered around a hypothesis for why a certain strategy will yield a particular result.

We will use tools, such as the MECLABS Conversion Sequence Heuristic, that assess the psychology of how people make decisions to build the emails, websites, landing pages, advertisements, brand value propositions and lead generation strategies to effectively convert prospects into customers.

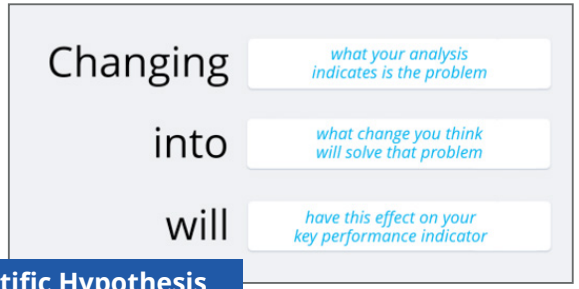
To make sure the experiments are scientifically sound, we will leverage our patented statistical models (which you'll have access to) to predict the required duration of the tests and address potential validity threats to your test results.

Every creative in an experiment goes through an expert bench of behavioral analysts and statisticians to ensure all of the variables are properly addressing the critical elements in the consumer's decision process.

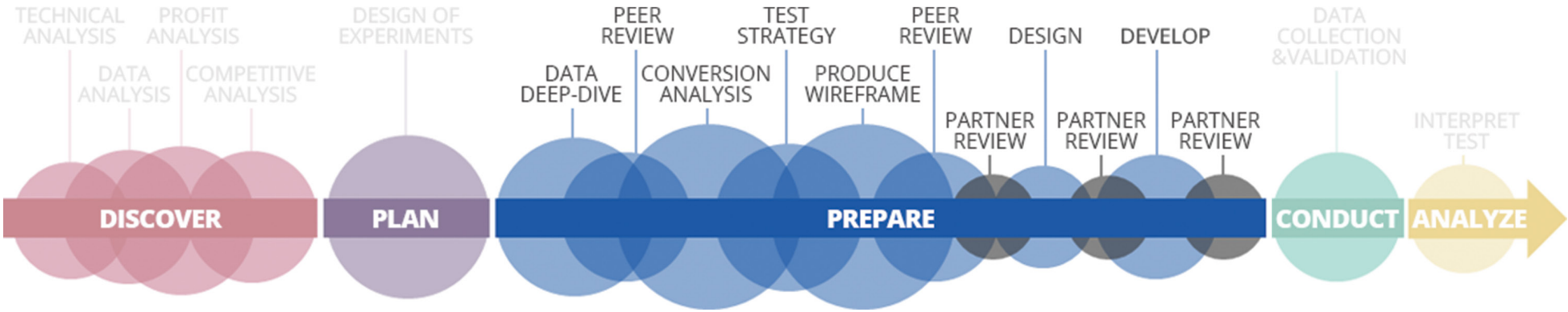
C = 4m + 3v = 2(i-f) - 2a



Optimized Wireframe and Design Treatment



Scientific Hypothesis



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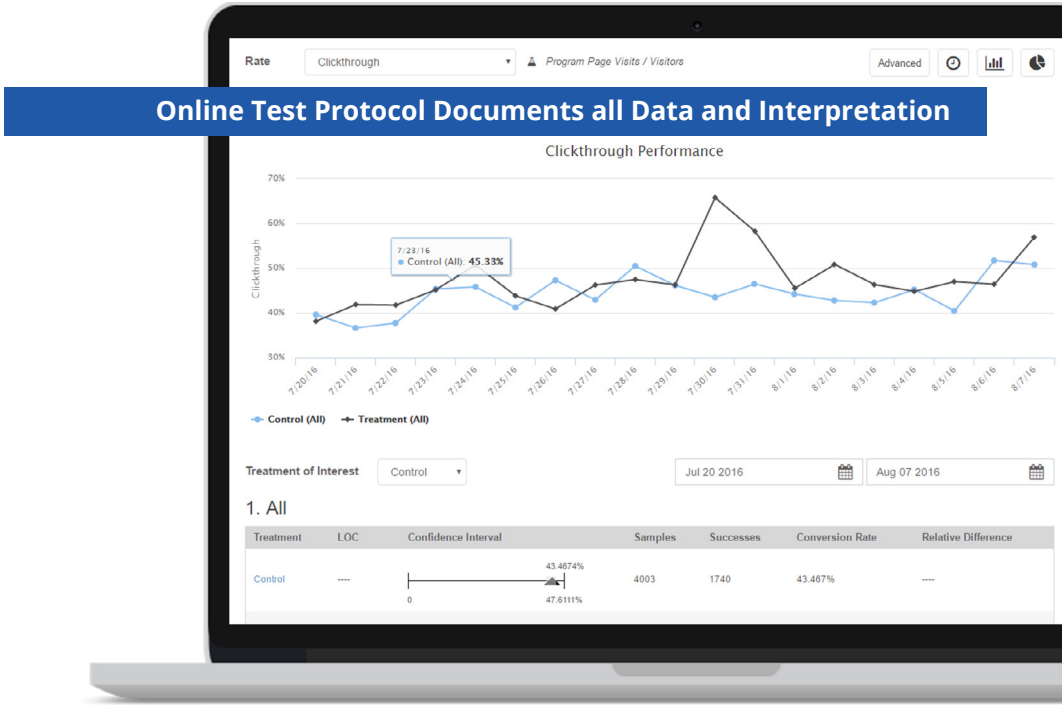
CONDUCT

Launch, Collect Data and Statistical Validation

As experiments are launched, they will follow a patented test protocol that is grounded in science. The protocol was built from 20 years of understanding the psychology of how people make decisions. It is structured to help you gather all the data for accurately measuring the experiments' financial impacts while documenting the key learnings from the patterns of your customers' decision-making processes.

In online testing, the ultimate measure of a test is its "utility." In marketing optimization, a useful test is one that helps you predict future customer behavior. Five elements compose the utility of an experimental test:

- Proper research question
- Treatments founded on a well-designed hypothesis
- Choosing the right primary and secondary metric to measure (and ensuring they are being measured properly)
- Accounting for all four validity effects (history, instrumentation, selection, sampling distortion)
- Gaining impactful insights through our objective and speculative interpretation process





ANALYZE

Interpret Data to Prove (or Disprove) the Hypothesis
Once your test reaches an acceptable level of confidence and the results are validly certified, you'll be able to easily present the revenue and profit increases to your leadership and support teams.

The MECLABS Seal indicates that an experiment has undergone multiple validity checks by the MECLABS Data Sciences Team and is certified as an accurate representation of real-world customer behavior.

Equally as exciting, you'll identify and interpret all of the customer insights and quickly know where to apply them across your business throughout your sales and marketing initiatives. Since these findings have been certified, you can trust that any future decisions made using this data are going to produce a positive impact.

Then we update the Design of Experiments and financial analysis and adjust our plan accordingly to ensure the experimental sequence is focused on the right and best test.

This process, followed strictly, will produce sound, valuable outcomes that only get stronger as you iterate over and over compounding all of the results.

Call for Research Partners

We invite you to participate in an upcoming research project and gain major conversion increases. Three recent Research Partners achieved gains of 330% in revenue, 52% increase in leads and 102% increase in conversions.

This is a unique opportunity to work with our scientists to make new discoveries and drive significant increases across your funnel.

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