Optimization Planning Guide

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Kick off your optimization planning by resolving to take your digital channels to the next level by improving the customer experience through testing, personalization, and recommendations.

Use this guide to audit your current program, determine areas for improvement, and launch into the new year with a resolution you know you'll keep.

SITESPECT

Start an Optimization Plan

- **Establish your primary business goal:** A great place to start is with your primary goal. For example: purchases, form submissions, enrollments, etc. What's your biggest conversion? Start by A/B testing ways to improve the customer experience here.

- **Know your metrics:** What pages get the most and the least traffic? From which channels do customers or users arrive on your site? What are the bounce rates of your most important pages? Where are users dropping off? Where are users converting?

- **Perform a site audit:** Whenever you do a site audit, create a use case and customer that you'll navigate your site as. The more specific you can be the better. Real visitors have specific reasons and goals. That's what you want to replicate. Navigate through the customer journey. Take notes on areas that present friction.

Start an Optimization Plan

Take CRO to the Next Level

- **Add in Personalization**: You've been doing some great A/B testing and seeing results. Make a goal to branch out and create some personalized experiences.

- **Increase your number of A/B tests per month:** Once you get the hang of A/B testing, personalization, and optimization, a great next step is to up the number of A/B tests you run. Where do you get hung up? What's the A/B testing limit you're reaching?

- **A/B test on every channel:** Customers jump from one channel to the next, so it's important to make sure you're optimizing every part of their experience. What's working on your website? Try it out on your mobile site or your native app.
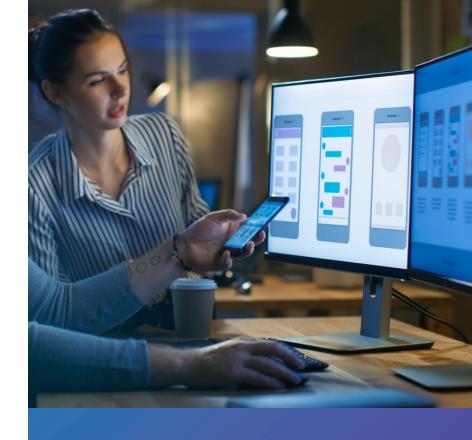
SITESPECT

Become a CRO Pro

- **Fine tune your micro conversions:** To get even bigger results out of your optimization efforts, focus on micro conversions. These are the small steps leading up to your primary conversion and make a big revenue impact.

- **Branch out across departments:** A great way to maximize your optimization strategy is to bring it across your organization. Developers can use server-side A/B testing to streamline and improve feature releases, IT can use it to help diagnose problems that may come up or aid in domain merges, UX can A/B test experiences, marketing can try different ad strategies, and the options continue.

- **Incorporate auto-optimization and machine learning:** Once you increase your A/B testing output, try taking advantage of auto-optimization to more efficiently offer the best experience to the right audiences. Or, use machine learning in your A/B testing program to heighten the success of the A/B tests you're already running.

- **Build a digital marketing roadmap:** A digital marketing roadmap is a powerful tool for determining buy-in, backing and enthusiasm for marketing initiatives. Marketers use it to clarify complex plans, highlight the most important initiatives, and promote their business strategy throughout the company.

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