webmechanix

Customer Journey Optimization: This Time, It's Personal

Table of contents

Going beyond conversion rate optimization (CRO) with customer journey optimization

Conversion rate optimization (CRO) and the customer journey are not the same, but they go together; you can't separate them. CRO is the process of optimizing the customer journey.

Any step you're taking to optimize the conversion rate—whether you're shortening a form or an intervening step—impacts the customer experience. While you need to make some tweaks on the back end during the optimization process, CRO is mainly about optimizing what the customer experiences on the front end.

Hence, you can't truly optimize conversion rates without intimately understanding the customer journey. Likewise, you can't have a customer journey if you don't have conversion steps to get users to move forward. You must identify pain points, overcome objections, and educate yourself.

Understanding why customer journey optimization is useful

If you run any E-commerce operation where transactions or conversions are essential, you must pay attention to CRO and the customer journey. Between points A and B, there are lots of smaller steps that determine how the customer will interact with your site. Customer journey optimization involves optimizing conversions, like those that get someone from the homepage to the product page or onboarding metrics that educate and persuade people to download an app.

Even if you're collecting lead form submissions in B2B, understanding conversion journey optimization can still help your business. Before you spend money on ads, SEO, design, or anything else, you need to have a vision of the customer experience that users have when they see your solution. You have to understand the journey and how prospects interact with you as a digital entity. **If you don't, you lose the sale.**

A viral video can inspire users, but if there's no next step, call to action (CTA), or add-to-cart button on the product page, customers will get stuck and won't move forward. They'll have no idea what to do next. This principle sounds obvious, but people often overlook it.

It's important to understand how the customer journey makes users feel. There's an element of design, empathy, and branding involved—it's a human-centric process.

How to optimize your conversion funnel

No one wants to be sold, but everyone wants to buy. Your success depends on getting people from point A to B as smoothly as possible by helping them buy.

To start, ask yourself these questions:

- What is going to make your site, story, or product compelling?
- How do you tell your brand story in a way that moves users to action?

Conversion funnel optimization, therefore, involves an intersection of branding and advertising.

Your degree of success in converting a prospect depends on your tone, language, and style. If you appear menacing or aloof when trying to shake someone's hand, that person probably won't let you. If you force someone to shake your hand, that halts any further steps he or she will take with you because you made him or her uncomfortable.

Our creative director, Bart, has a great metaphor to explain the three stages of a customer journey funnel:

1. When you are meeting someone new, you wave or make eye contact so he or she knows you exist; this is the **Awareness** stage.
2. When you extend your hand to shake that person's hand, he or she has to decide whether to accept your handshake; this is the **Consideration** stage, where prospects consider if they want you in their life.
3. And the **Conversion** stage is when you introduce yourself and ask for a name or phone number so you can follow up with that person.

Let's break down each stage in more detail.

1. Awareness

In the first stage, you're introducing a stranger to your brand. Based on our knowledge of consumer-packaged goods, we know that if a consumer isn't already aware of your product or company from ads or having seen you in stores, you're invisible. Human brains naturally filter out anything that isn't relevant to them because we encounter far too many stimuli at once. The next time you're in a store, look for new brands on shelves—you're bound to find plenty that you never noticed before.

WIIFM—What's in it for me? New customers only care about what they're going to get out of your solution, not what you want from them. You must invest in building that brand equity. Typically, you persuade prospects by explaining, in simple terms, what they will get out of an interaction. Enticing people is deceptively difficult, but by deconstructing your value proposition, you can do it.

2. Consideration

At this point, if you've optimized the Awareness stage correctly, prospects know who you are and what role you'll play in their lives. With quality targeting, you can get them to consider.

This stage is about appropriately segmenting and (re)marketing to leads who are aware of you. Know who you're targeting and how to segment users to give them an offer they care about. Facebook can give you millions of people to get in front of, but not all of them are ready to buy yet. If you can filter out people who aren't ready to buy, you can improve ROI and reduce wasted ad budget.

Know your audience. Say a 25-year-old, unmarried male with no kids is looking at your ad. No matter how many times you show him a Pampers diaper ad, he will never buy them. Simply put, he doesn't have a desire or need for that product, so marketing to him would be a waste.

That's why it's so important to qualify prospects—to filter out people who aren't relevant to your solution by offering a specific lead magnet. People who are willing to give their info are generally more interested than those who aren't. Moreover, getting their info provides an avenue to nurture the relationship and connect with prospects over an extended period.

Accurate targeting, however, is not enough. **Differentiation** is another essential part of the process. As an illustration, you can let "outdoors people" know about an outdoors product you offer, but that won't mean they'll buy it from you. You must show how you're different by:

- Explaining why prospects should prefer your solution to those offered by competitors.
- Introducing a wow factor that builds differentiation and loyalty.

Remarket to people who are more interested, since you can speak to them better and they're more likely to listen.

3. Conversion

In the Conversion stage, you've already qualified prospects through awareness and consideration; you want them to pull the trigger. The conversion stage is an emotional stage. Make the conversion process as smooth and easy as possible.

Improve the **relevancy** of your message. Make sure to reach prospects at the right time: when they're ready to purchase. One example is a business mistakenly contacting prospects at work, which isn't an ideal time because they may not be available to buy and will likely have other priorities. In this case, the business should wait until prospects are home to send them a sales email.

Relevancy also means demonstrating how the product experience is great. If you're targeting someone who meditates and trying to sell a meditation pillow, you want to make sure the prospect knows it's a pillow they can't live without and something that will take their meditation practice to the next level.

That leads us to **driving urgency**. People naturally delay their purchase unless there is a strong reason to decide now. It's your job to persuade prospects that now is the time to buy. Here are a few suggestions:

- Emphasize fear of missing out (FOMO). You can talk about missing out on a better experience, a key discovery, or opportunity.
- Use deadlines. Offer a coupon with a quick expiration date.
- Use abandoned cart or browser abandonment tools to capture lost customers with remarketing.

When you've done your job correctly with urgency and relevancy, people will fight through obstacles and inconvenience to act. But not everyone will.

If you want to improve conversions in this stage further, make the user experience as easy as possible. Try out the following:

- Use custom cookies for returning users so you can spend more resources to remarket to those who are more ready to convert.
- Personalize where you're sending users when you remarket with services like Privy.
- Offer semantic site search and site filtering, which speaks the language of humans and not strictly that of your product feed.
- Make coupon codes easy to redeem. Have the code apply to checkout automatically from the email or stick with the user throughout the session.
- Optimize the check-out process.
  - Offer payment options in native currencies.
  - Make payment as easy as possible with payment plan options.
  - Use auto-fill forms to save customers time (Shopify does this).
  - Reduce the number of unnecessary form fields because they often hold customers up.

5 common conversion optimization mistakes beginners make

You're almost ready to get started with customer-journey-centric CRO. But before you do, read these common mistakes to avoid wasting time and money.

1. Marketing to anyone, and everyone, who visits the site

Not everyone who visits your site is aware of or considering your solution. We often found ourselves landing on a site with no intention of ever making a purchase. Sometimes, the wrong people stumble across your site—it happens.

The first major mistake we see is **zero segmentation of audiences**. Without segmentation, you don't know the difference between someone who was about to buy and abandoned the cart and someone who was curious but will never have an interest in purchasing.

When you correctly use remarketing, you already have a list of people who are aware of you. One of the most powerful things you can do is segment your remarketing audiences. If you already are, you're ahead of the game. Even so, you can still segment in greater detail by what drives conversion, such as by people who viewed product pages, bounced, added products to their cart, made purchases, or viewed a certain number of pages. You can use Google Analytics to find out what behaviors matter.

You may, for instance, find that people who purchase spend a lot more time on the site. Hence, you can create an audience of people with longer browsing sessions and target them differently. We use Google Analytics and Google Ads as our primary tools to create audiences and remarket to them. You can get as simple or sophisticated as you want. We tie in email marketing to add another layer of segmentation. But for people starting out, the first step is to break out audiences.

2. Lack of specialized messaging

There's a difference between someone who has never heard of your brand and someone who is about to make a purchase. If you only have one set of ads for different personas, that's not going to be compelling. It'd be inappropriate to say "We'll give you 20% off to finish your order" to someone who visited your site for the first time and hasn't taken any other actions.

3. Focusing too much on tactics that don't move the needle

The classic example is when you have a landing page with a CTA and obsess over whether the CTA button should be red or blue. Unless you have an enormous amount of traffic and are already well optimized, this kind of change will make a mere fraction of a percent in impact. For the average small-to-medium-sized business, it will mean nothing.

Don't focus on elements that aren't important to the customer journey. Color changes mean nothing, but changing the segmentation to deliver the right message at the right time will have a meaningful impact.

4. Believing that "if you build it, they will come"

If you're an Amazon E-commerce marketer and have decided to move to your own, don't assume people will immediately flock to your site and interact with it the same way they did on Amazon just because you built it yourself or have a great idea. People aren't going to beat down your door to buy your product.

The dynamics of generating traffic and segmentation are very different on Amazon. With Amazon products, you're marketing to people who are already in the Consideration or Conversion phase. You don't have to pay for or obtain traffic; Amazon has already invested resources in getting prospects through the first two stages of the funnel with their brand equity. And once prospects find your Amazon page, they're also already well qualified. You don't have to do as much work.

But when you have your site, you have to find customers. You're not only designing your site but also figuring out a delivery system that will have to compete against 2-hour delivery. There's also the credibility of Amazon that you will no longer enjoy. The sheer traffic numbers on Amazon are massive, so you don't have to put in much effort to get sales on their platform. Now you're on your own.

We see people who come from an Amazon store with expectations of certain economics. When their expectations don't materialize (like when they find their conversion rates aren't as high as they had hoped), they will require a perspective shift.

5. Poor branding and creative

Nowadays, it's easier than ever to get a store set up with out-of-the-box solutions. There's WordPress, Squarespace, Shopify, and Stripe. Assuming you already have a product or service, the setup is relatively easy. The tough part is working on the branding and ad creative, which aren't natural to business people because they require more creativity.

Differences between B2B and E-commerce conversion funnels

In the business-to-business (B2B) industry, there are some key differences to consider that set it apart from the traditional E-commerce conversion funnel:

- The sales process is longer and more complicated.
- There are more moving parts than the parts in B2C.
- Prices are higher, and margins are larger than those in B2C.
- You need a sales team to qualify and get a demo, approval, and buy-ins from different parts of the business.
- It's easy to lose the thread from obtaining a lead to getting a purchase, even with SaaS solutions.
- You're collecting leads instead of sales because you're less likely to find a decision-maker.

At WebMechanix, we do a lot of the first stage in the B2B customer journey map: capturing high-quality leads at the lowest price possible with a digital marketing system and handing them off to the company to continue the process.

For the business-to-consumer (B2C) industry, it's a much different situation:

- You can find similar customers with machine learning.
- It's easier to find the right people and market to them.
- It's easier to measure the return and effectiveness of your marketing.
- Sales have higher volumes, smaller margins, and lower price points.
- The decision-maker is the prospect you're marketing to.
- Marketing is more straightforward than in B2B when you want to automate and scale.
- It's easier to monitor and track the entire customer lifecycle from awareness to purchase.
- Everything is generally happening online. You can measure how often users see your site, ads, and so on (unless they clear their cache).

Optimizing your conversion funnel on any budget

On a limited budget

Optimizing with a limited budget is tough; it's hard to do large-scale testing to find your ideal audience, creative, and messaging.

For small businesses, start with one or two channels max, like Google Ads or Facebook Ads. If the customer already knows what they want and is trying to figure out how to get it, Google Ads is a great option for your conversion optimization efforts. You already know there's demand, so it's simply a matter of getting in front of that demand with keywords.

If you want to sell a new, innovative product, start with Facebook ads because you can use attributes to find the people you want even if they don't know about your solution yet. At the least, you can validate your idea.

On a large budget

If you have a large budget, optimize through testing, testing, and more testing. Whether you use Facebook or Google Ads, test ad creatives and audiences to find out what works best. You can segment audiences by demographics, age, gender, and so on until you find a clear winner (or winners).

With Facebook, set up different tests based on remarketing lists, Lookalike, Interest-based, and Custom Audiences. Test these audiences and match them with three or four messages and creatives (such as using hard-sell vs. being explicit about what your product does vs. inciting curiosity). You can set this up yourself or use a platform like AdEspresso to ease the process.

Once you find what works, scale the budget up. Say you did ten tests and found two with an acceptable target cost per acquisition. Pause the losers and plow more money back into the winners. Use the lessons learned to scale up and plan your next experiments.

How to avoid wasting tons of money testing out tactics

When you're starting out, **know what you're trying to measure**. What's your goal? Are you trying to get engagement, sales, or something else? Be honest with yourself. If your goal is to get more sales, you can find out quickly if a tactic is working by looking at the numbers. Engagement is nice, but it doesn't matter if you aren't getting sales. If your goal is to create a lot of buzz, you measure by different metrics and use different tactics, like testing new creative to improve social engagement.

Get as close to one-to-one communication as possible in a scalable way. In other words, you must understand your audience and segment them appropriately so that your messaging and branding resonate with them on a personal level. You don't need to get as personalized as "Hey, Steve" in a display ad, but you do need to speak the language of the audience you're talking to.

Generic messaging sucks. If you use a message that can appeal to 90% of the entire population, it simply won't be compelling, and you won't drive many sales because no individual or niche will be excited about what you have to say.

Segment, segment, segment. If you have a product that can be used by housewives, outdoor enthusiasts, and construction workers, don't just have one message that tries to appeal to them all. Find out what each of these groups values and their emotional triggers:

- Construction workers may want to symbols of their manliness.
- Outdoors enthusiasts are likely to be more environmentally conscious.
- Mothers may want to make life easier and have more time with the family.

Where does your target audience live and interact with content? **Find out where they spend their time**. Does your audience spend a lot of time on Instagram, Snapchat, Facebook, Reddit, or Tumblr? If 90% of your audience is on Tumblr and you're only marketing on Facebook, you're wasting resources.

Your audience will gravitate towards one or more platforms based on their attributes. Each platform has its flavor of content:

- Reddit has one-off posts with interaction in comments.
- Facebook is a social place for friends and family.
- Twitter is more of a public message board.

Is your solution a new idea, an invention, or innovation? Is there existing demand for your solution? If your business sells a commodity, Google Ads is a good place to start. If you're in a brand-new industry, avoid Google Ads because there may be little to no relevant search volume for your solution. Go on a platform like Facebook that's more suited to discovering products than solving a problem.

Our biggest tip for a marketing leader

If there was one insight about conversion funnel marketing that we would tell a Director of Marketing or Chief Marketing Officer if he or she forgot everything else in this article, it would be this:

You must strive to **personalize the experience at every stage of the customer journey to build brand equity with users**. This process includes (but is not limited to):

- Pre-purchase
- Purchase
- Unboxing
- Use of the product
- Brand perception afterward
- The follow-up

With an E-commerce conversion funnel, you absolutely must differentiate when there are thousands of competitors. What's more important is making sure you succinctly explain how you're different with personalization in a compelling way. Make the customer feel special so they listen to you and become loyal to you.

It's never been easier to personalize the buyer experience, and the fundamental marketing principle of reaching the right prospect with the right message at the right time has never been truer. If Amazon has taught us one thing, it's that E-commerce, at its end, is a commodity game—and to succeed in this environment, you must differentiate yourself through personalization.

Companies that invest in understanding who their customers are and use compelling brand messaging and analytics to segment their users and persuade them will outpace the competition and obtain greater sales.

Wrapping up

CRO and the customer journey are inextricable—if you neglect one, you're neglecting both. If you can understand the three stages of the marketing funnel and how to communicate to prospects differently in each step, you can optimize for value creation. And don't forget that there are nuanced differences between how CRO plays out in E-commerce, Amazon stores, and B2B.

Above all, make sure you personalize the customer experience as much as possible to build loyalty and trust.

What's your biggest stumbling block when it comes to customer journey optimization?

Want more personalized advice & hands-on help?

We got you. Go to WebMechanix.com or just give us a ring at 443.927.7195. Ask for Chris M. & tell whoever answers the phone that you read our customer journey optimization guide. I'll give you my best advice & get you moving in the right direction.

About WebMechanix

WebMechanix is a performance-based digital marketing firm on a mission to help middle-market companies move needles faster, more meaningfully and more sustainably than any comparable solution on the market. Founded in 2009 by Chris Mechanic and Arsham Mirshah, the company is headquartered in the Baltimore-Washington region.

Today, WebMechanix is one of the fastest-growing digital forces on the scene. This exponential growth is fueled by its Partner & Promise approach, where WebMechanix focuses on deeply understanding and exceeding unique client needs to measurably impact business results.

We earned the top spot regionally on clutch.co for digital marketing. WebMechanix is also a Google Premier Partner, HubSpot Platinum Certified Agency Partner, and consistently ranked on the Inc. 5000 list. Our creative team has won gold and platinum awards from the Hermes and dotComm awards.

1.888.932.6861
https://www.webmechanix.com/

Contact Us

or visit

webmechanix.com

for more information