

The DTC Brand's Guide to Maximize CLTV



Table of Contents

| | |
|--------------------------|----------|
| Introduction..... | 4 |
|--------------------------|----------|

| | | |
|-----------|---|----------|
| 01 | Customer Value Optimization Basics | 6 |
|-----------|---|----------|

| | | |
|------|--|----|
| I. | How Conversion Rate Optimization Gave Birth to CVO | 7 |
| II. | The Problem with Conversion Rate Optimization..... | 8 |
| III. | Defining Customer Value Optimization | 11 |
| IV. | Conversion Rate Optimization vs. Customer Value Optimization | 12 |

| | | |
|-----------|---|-----------|
| 02 | Mapping Out the Ideal Customer Journey | 14 |
|-----------|---|-----------|

| | | |
|------|---|----|
| I. | The Customer Purchasing Process | 15 |
| II. | Should You “Always Be Closing?” | 16 |
| III. | Macro and Micro Conversions | 17 |
| IV. | The Age of the “1-Phase Sale” is Over | 18 |
| V. | There is No Ideal Shopper | 20 |

| | | |
|-----------|---|-----------|
| 03 | The Personalized Customer Experience | 22 |
|-----------|---|-----------|

| | | |
|------|--|----|
| I. | What Personalization Means to E-commerce | 23 |
| II. | Why Data is Your Most Precious Resource | 24 |
| III. | Personalization Techniques | 26 |
| IV. | Message Customization..... | 27 |
| V. | Segmentation | 27 |
| VI. | Dynamic Content..... | 29 |
| VII. | Layered Messages..... | 30 |

| | | |
|-----------|---|-----------|
| 04 | The Five-Step Optimization Process | 37 |
|-----------|---|-----------|

| | | |
|------|--|----|
| I. | Platform Setup and Data Collection | 38 |
| II. | Data Analysis and Opportunity Exploration..... | 39 |
| III. | Creating an Optimization Plan | 44 |

| | | |
|-----|---------------------------|----|
| IV. | Setting Up Campaigns..... | 47 |
| V. | Evaluating Results | 48 |

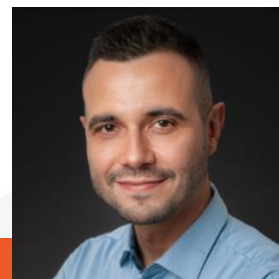
05 Real Word Strategies and Practical Examples51

| | | |
|------|--|----|
| I. | 1. Buyer Stage: Completely Problem Unaware | 52 |
| II. | 2. Buyer Stage: Problem Aware Customers | 55 |
| III. | 3. Buyer Stage: Solution Aware Customers | 59 |
| IV. | 4. Buyer Stage: Product Aware Visitors | 62 |
| V. | 5. Buyer Stage: Fully Aware Customers | 66 |
| VI. | 6. Buyer Stage: Post Purchase..... | 69 |

Conclusion.....73

About the Author – Csaba Zajdo:

Csaba is the founder of OptiMonk and several other projects in the ecommerce space. He's helped launch thousands of online stores, is a regular speaker at ecommerce conferences and is the author of numerous articles and studies.



support@optimonk.com
+1-415-800-4445

www.optimonk.com

Copyright © OptiMonk International Zrt.
All rights reserved.

Introduction



Online retailers and web store owners consistently tell us that their number one challenge is Customer Acquisition. They want more traffic to their online stores and higher numbers of those visitors converting into customers. The problem is, too many small businesses and e-commerce store owners are trying to compete with online retail giants by using annoying, short term marketing tactics.

As more shoppers move online, competition for shoppers -- and revenue -- is fiercer than ever. Smaller businesses now compete with giants like Wal-Mart and Amazon to win new customers. But one of the ways smaller brands can use to their advantage is by providing a smooth, personal shopping experience.

Focusing on value creation throughout the customer lifecycle is how all businesses can best acquire, monetize, and retain customers. This approach is called Customer Value Optimization (CVO). It's a customer-centric framework that puts shoppers at the heart of the experience.

In this guide, we'll tell you the philosophy behind Customer Value Optimization and why it turns traditional Conversion Rate Optimization (CRO) on its head. You'll learn why focusing on value creation increases revenue and how to implement CVO for your own online store.

And you'll see how CVO increases conversions at all stages of the purchasing funnel. Your level of customer satisfaction will increase, shoppers will be more likely to be return buyers and their overall lifetime value will rise.

Customer Value Optimization also makes life easier and more convenient for marketers. You'll gain satisfaction that you're actually providing value and assistance to customers, not just manipulating them to click through and buy.

The guide shows you how to migrate from a traditional short term conversion optimization approach to a long-term Customer Value Optimization - and win customers for life.



Customer Value Optimization Basics



A customer journey refers to the customer's entire online shopping experience from beginning to end. From the moment they click onto a site to the moment they click "purchase," the customer journey determines how users experience your brand online. Conversely, a poor customer journey causes online retailers to lose customers.

Traditionally, the e-commerce customer journey has been vanilla at best, completely off-putting at worst. All customers get shown the exact same popups and messages, making the customer experience lack personalization and utility. The main goal is simply to convert as many shoppers as possible in the short-term but with no regard for long-term brand loyalty.

The name of this outdated approach is called Conversion Rate Optimization (CRO). And while CRO has been effective in boosting online retail sales, the cost is often low user experience and satisfaction.

How Conversion Rate Optimization Gave Birth to CVO

Conversion rate optimization (CRO) is the set of all actions and processes aimed at increasing a website's conversion rate. Conversions could be anything from a visitor signing up for a newsletter or downloading a report to completing an actual purchase.

How do we calculate a website's conversion rate? Conversion rate shows how many out of 100 visitors reach a certain conversion goal. For online stores, this means purchase completion. If two out of every 100 visitors make a purchase on average, the site's conversion rate is two percent.

CRO has a wide range of methods and tools. The most typical ones are:

- A/B testing
- Popups, customer surveys
- Heatmaps, click-tracking
- Analytical tools
- Dynamic product recommendations
- Landing pages
- Personalization tools

The keywords “conversion rate optimization” yield 127 million Google search results. The list of tools and possibilities are endless. And there’s nothing wrong with that. The tools mentioned above are all useful and have enormous potential if used properly.

So, what’s the catch?

The Problem with Conversion Rate Optimization

The biggest issue with CRO is that it encourages short-term thinking. Retailers chase quick sales and wins at the expense of the shopper experience. Short-term wins result in long-term losses in terms of brand loyalty.

For example, you might think that discounting your products to increase conversion rates and sales is a good idea. The problem is, this strategy often isn’t sustainable. You’ll simply eat into your profit margins and sacrifice long-term relationships with your customers in the name of short-term revenue.

That’s just one example of potentially negative outcomes that stem from focusing solely on short-term conversions. It’s clear that using conversion rates as our sole key performance indicator (KPI) is a huge mistake for e-commerce store owners. And it’s something that is totally avoidable.

Most online retailers don’t even realize the problems that CRO is causing. Errors affecting the customer experience usually remain hidden. Most online shoppers don’t complain if they have a bad customer experience. They just leave and never come back.

Imagine a visitor coming to your website. He’s curiously seeking a solution to some of his problems. Have you ever wondered what kind of experience you are providing by immediately throwing around some “awesome discount”?

Or when he returns in a couple of days and you treat him the same way as if you saw him for the very first time? Giving him the same “one-time” offer again as you did last time?

Unfortunately, the methods used by CRO are very often eerily similar to manipulation. Where the goal is not to help or create value. But only sales above all. And visitors can sense that.

Today's shoppers don't like being told what to do. Instead, they prefer a personalized shopping experience tailored to their needs. Tech giants like Amazon, Facebook and Google seemingly remember everything about a shopper and provide this type of curated experience.

The most successful web stores in the world -- from Amazon to Etsy -- put consumers in control of their online experience. While these large platforms do provide things like product recommendations and promotional offers, it's done with the customer's needs and wants in mind. Instead of pushing shoppers towards conversions at all costs, brands like Amazon take a long term, customer-centric approach.

Today's modern web stores have a number of harmful practices that result in a poor digital customer experience. Here are a few typical examples:

- **Annoying popups:** Nothing is more annoying than an irrelevant popup already popping into the customer's face when they have just arrived at the page. It's a poor first impression.
- **Irrelevant offers:** Shoppers can easily be fooled by Google search ads after clicking through. All too often, the product doesn't match or is not relevant to the ad the user clicked through in the first place.
- **Lack of assistance:** Online retailers often communicate product variety as an advantage. But we do nothing to ensure the visitor chooses the most suitable product from the many hundred – and often unknown - products.
- **Distracting graphics:** Web store owners are eager to showcase the many great products they have for sale. The problem is, too many visual offers, messages and products can be distracting to shoppers. If there are too many messages on the site, visitors will feel like you're shouting at them and simply exit the page.
- **A false sense of urgency:** Too many online stores offer shoppers a supposed "limited time discount" that's not really limited. These messages are simply designed to trick users into making an impulse buy. When customers come back the next day to see the same discount available, they'll lose trust in your brand.

- **Lack of personalization:** Many online stores offer the same, generic discount no matter what the shopper wants or what their history is. Showing every customer a 10 percent discount at every single buyer stage is both annoying and ineffective, for example.

You may recognize some of these missteps in your own online store. And that's ok. Marketing professionals have e-commerce retailers convinced that the above CRO tactics are necessary. And frankly, we admit to being in that same club once upon a time.

Fortunately, there's a better way forward for both you and your customers. You'll increase sales and profits while retaining more customers. And you'll also feel better about yourself.

That way is Customer Value Optimization.

Defining Customer Value Optimization

Customer Value Optimization (CVO) is the process of creating a great customer journey and maximizing the ROI for all marketing activities. It focuses on optimization throughout the customer lifecycle to improve brand and loyalty—and create customers for life.

Most of what CVO does is creating value and helping customers find solutions to their problems. CVO is about figuring out what people want, how they want it, and then delivering the right solutions. It's about better marketing and business growth through personalization and adding value.

But Customer Value Optimization isn't a charitable act. We're not providing a better user experience out of the kindness of our hearts. We know that people tend to buy from companies that solve buyer problems. Shoppers return to online stores where they didn't feel annoyed about their previous purchase, and where they had a positive experience.

Customer Value Optimization is not a new phenomenon or a temporary trend. It's more like finding our way back to the roots. We're going back to the core belief that the best customer is a satisfied customer. We can also view CVO as human -- or customer-centric marketing.

Since the birth of commerce, successful merchants have built businesses on the premise that creating value for customers is the best thing to do. That's because customers will remember that and return value in the form of loyalty and future purchases. The world of e-commerce is no different.

However, Customer Value Optimization adoption isn't an overnight process. While you'll see some results in the short term, CVO is a long-term philosophy that pays dividends over time. It's a framework that you'll have to implement on an ongoing basis. It's not just "set it and forget it."

Customer Value Optimization helps web stores and online retailers get the most of their online brand presence. Everything you do in the online world should be customer-centric and in the best interests of your visitors. By adopting this philosophy, you'll gain a massive advantage on competitors.

The key benefit of Customer Value Optimization is that this approach is the surest way to create more value for customers and -- as a direct consequence -- increase online revenue.

Regarding short-term results, you'll see an improvement in key metrics like conversion rate and average order value. These KPIs will directly impact margins and profitability. Customer Value Optimization isn't designed to spend money for extra traffic. What CVO is designed to do is better monetize visitors you've already acquired via your marketing spend. Therefore, any additional sales gained from CVO is a net benefit.

You can often get quick wins by eliminating the most painful parts of the customer experience. However, the real benefits of Customer Value Optimization will come in the long run. Many customers who weren't initially ready to buy will gradually mature into purchase-ready customers that will increase revenue. Customers who previously purchased will be more satisfied and will return more than once, significantly increasing the average customer lifetime value.

Finally, CVO makes marketers' lives easier and more enjoyable. It's one of those hidden benefits to CVO that I think is incredibly important. Improving the customer value is like the North Star of online marketing. A great customer experience helps your brand cut through the noise and differentiate yourself in the marketplace. CVO will also help you as a business leader and online marketer, facilitating better decision making. Your life will become more stress-free and satisfying. CVO is one of the best investments of time and energy that you can make that will inevitably steer your company in the right direction.

Conversion Rate Optimization vs. Customer Value Optimization

The main difference between Customer Value Optimization and Conversion Rate Optimization lies within the mindset of the marketer. The tools and technologies used are mostly the same.

Any technology can be used for good or bad. E-commerce is no different. Most CRO tools were invented with harmless intentions. Some marketers and companies use CRO tools properly. But unfortunately, short-term revenue

pressures and self-appointed marketing gurus have led CRO users down the wrong path.

Let's compare these two methodologies:

| | CRO | CVO |
|-------------------------|---|---|
| Focus | Increasing the conversion rate, even at the cost of destroying the customer experience. | Improve customer experience, helping the shoppers in a better, more effective way. |
| Improved metrics | Conversion rate | In addition to the conversion rate, the average cart value, the ratio of returning customers and the customer lifetime value will also improve. |
| Methods | Tries to convince the visitors to purchase with minor changes and small tricks. | Creating value at every point of the customer's lifecycle, providing real help. |
| Timeline | Short-term thinking, willing to trick/deceive the customers for immediate sales. | Focus on long-term strategy and forming deep relationships with customers over time. |

The differences are philosophical, not technical. Technology is constantly changing. There are better opportunities for online merchants to help customers and to mislead them. It's up to us what we use these technologies for.

Now that we can see the goal, let's dive deeper. How can we optimize the customer experience? As a first step, let's review what the "optimal customer journey" looks like!



Mapping Out the Ideal Customer Journey



First of all, you need to understand the customers and their problems in order to get the most out of Customer Value Optimization. This way you can offer real help to your customers in solving their problems, and you can provide a truly positive customer experience. This chapter helps you with that.

Let's see what an online purchase looks like from the buyer's perspective.

The Customer Purchasing Process

Any purchase that takes place is the inevitable result of the customer's own psychological purchasing process.

None of your customers were born to want your product or service. It's a gradual process that takes place over time and can strike suddenly. It often takes a long time from the first thought formulating in the customer's mind to finally making a purchase in your web store.

We've known **since the 1960's** that customers go through five stages of awareness to become purchase-ready:

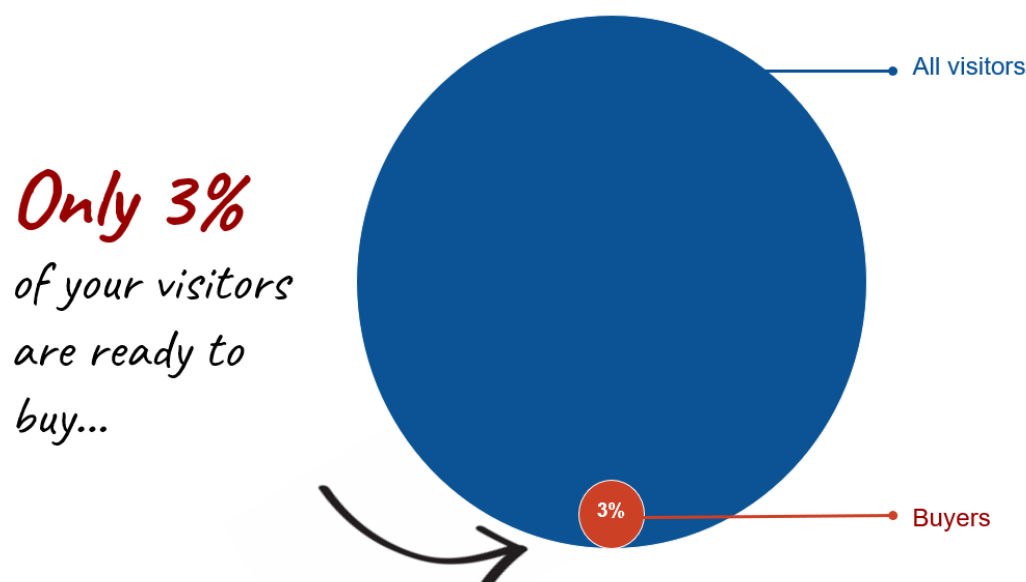
| Customer Awareness Stage | Description |
|------------------------------------|---|
| Completely Problem Unaware | The visitor either doesn't have a problem that your product can solve -- or isn't aware of the problem yet. |
| Problem Aware | The visitor senses a problem but doesn't know if there's a solution. |
| Solution Aware | The visitor knows there's a solution. But he can't decide which product is the best fit. |
| Product Aware | The visitor understands that your product offers a solution. But he isn't sure if it's the perfect fit. |
| Fully Aware | The visitor realizes that your product is perfect for solving his problems. He's simply waiting for a good offer. |
| Already Purchased Something | The visitor has completed a purchase. He's happy and waiting for the product to arrive. |

Next let's reflect on the meaning of these awareness stages. In practical terms, it means that most first-time visitors to your website aren't purchase-ready.

Should You "Always Be Closing"?

One of the biggest – and most damaging – myths of online marketing is that every site visitor is ready to buy. All they need is an amazing offer to act right away.

This couldn't be further from the truth. In fact, barely three percent of shoppers are ready to buy on their first visit.



Just because 97 percent of your site visitors aren't purchase-ready doesn't mean they're low-quality visitors. It just means that most shoppers are at the early stages of the purchase process. It'll just take time for them to buy.

Some visitors are only at the "Solution Aware" stage. They already know that they want to buy a bicycle but have no idea which one would be the best for them from the many hundreds of bikes listed on your website.

It's pointless to offer a ten percent discount for these customers at the lower stages of customer awareness. It makes no sense to shout out loud in capital letters: "special offer, only now, only today!" Until someone helps them find a

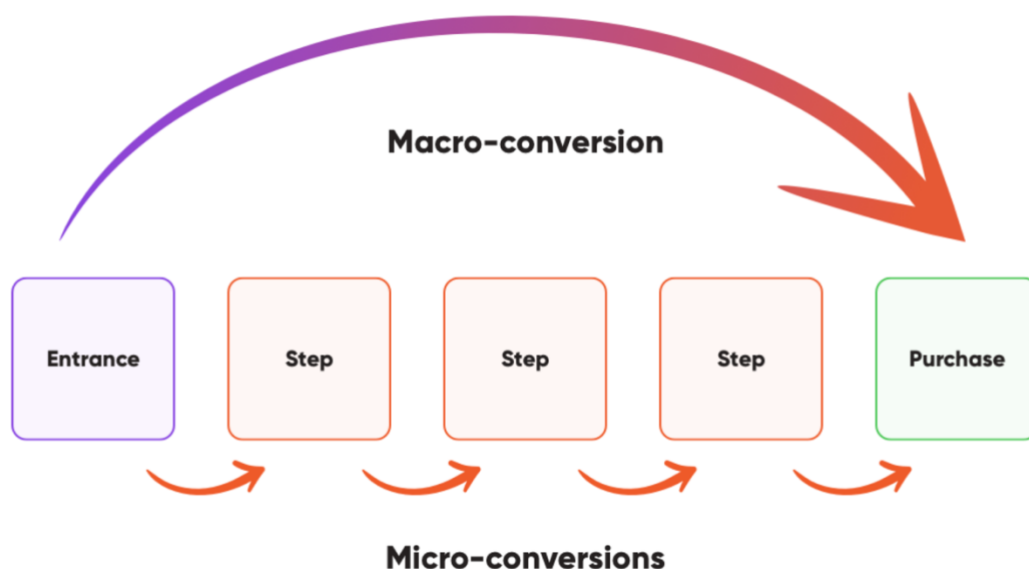
reassuring answer about which bike they should have, they won't buy it – and that someone can be you or one of your competitors.

So, what is the solution? Is it possible to convert the 97 percent of visitors who are not ready to buy yet? The answer is yes, it's possible to convert them right away – just not into buyers. To understand that, let's talk some more about macro and micro conversions.

Macro and Micro Conversions

When a customer completes the final, desired action on your website, it's a macro conversion.

Before reaching the ultimate macro-conversion goal, visitors need to get through some smaller micro-conversions. Until the visitor performs these micro-conversions, he won't get to the final macro-conversion goal.



If we go back to our previous example of buying a bike, our customer was "Solution-Aware." He understands that he needs a bike but doesn't know which one. In this situation, our first micro-conversion goal is that the customer should select the most suitable product from the product list. As long as he doesn't meet this "Product Selection" micro-conversion goal, he will definitely not buy.

Here's how we can support shoppers like this by finding the most suitable product and meeting the micro-conversion goal:

- Providing an effective filtering system for the category page of bicycles
- Highlighting the most popular bicycles as a form of social proof
- Showing a “How to Choose Your Bike” guide
- “Quiz for choosing a bike” – do our quiz and we tell you what kind of bicycle you need
- Providing online chat that starts with a helpful question - “Can we help you choose?”

A CRO-focused approach would ask: Wouldn't it be better to try closing these visitors right away, to sell them something immediately? Let's show them promotions or give them a ten percent discount on a bike. Or maybe start a countdown that they only have ten minutes left to buy a bicycle with the ten percent discount.

We know this isn't the right solution. This aggressive sales approach only hinders the customer from performing the end goal.

A fundamental principle of Customer Value Optimization is not rushing the purchase.

When we rush a purchase, we can accidentally give our visitors whiplash before they've had a chance to get to know our site. To avoid this, aiming for micro-conversions helps visitors address their problems or challenges.

Does that mean we have to settle for non-financial macro-conversion, like signing up for a newsletter?

When and how will we be able to turn non-financial macro-conversions into real earnings?

The Age of the “1-Phase Sale” is Over

We have to accept that most visitors who are in their early-awareness stages, probably won't convert on their first visit.

Your customers are just at the beginning of their own customer journeys, and they have to navigate that journey step by step as they discover your site. They also have to develop a need for your products, build trust with you and depend on you to guide them in making a purchase. The process is different for every

person and every product. For some visitors, it happens on the first visit. For others, it can take weeks or even months.

Think about previous shopping experiences when you bought something of huge value or something that was important to you: like a TV or new furniture for your living room. How much time did you spend searching for your options and reading about it? How much time did you need to get from Point A: The first “I need it” to Point B: “I’ll order it”?

The more expensive or complex the product is, the more time this process takes. But even if we talk about the cheapest or most simple products, a significant number of customers still need more time until they convert into buyers.

If you want to maximize your ROI, you have to stop pursuing a “1-Phase Sale” and start implementing a “Multi-Phase” approach where you can help your visitors and provide real value to them.

How can you support your visitors in a personalized way over several days or even weeks? It’s simple: at the time of their first visit, you can focus on building a “personal” communication channel and getting your visitors’ permission to send them messages.

The most common “personal” communication channels are:

1. Signing up for an email list
2. Signing up for an SMS list
3. Signing up for a Messenger list

When using these “personal” channels (but especially when using the first two), you are not exposed to third parties, and your email list cannot be taken away from you. That’s often not the case with different remarketing solutions. Not to mention their extremely uncertain future— due to increasingly strict data protection rules.

A full customer journey can take many steps. A visitor may visit your website five or ten times and read a dozen of your emails before he converts into a buyer. But it doesn’t matter if it’s your first or tenth time communicating with this customer on any channel: you should aim to help him with personalized and accurate messages fit for his current situation.

Helping shoppers with specific problems is a lot easier in real life. The challenge is to replicate that same personal touch at scale, with thousands of online shoppers.

But understanding how to personalize at scale, first requires knowing what mistakes to avoid.

There is No Ideal Shopper

The concept of Buyer Personas and Ideal Customer Profiles (ICP) was invented with good intentions. However, personas and ICPs don't include the importance of personalization.

The typical Buyer Persona looks something like this:



Daisy Discount

Demographics

Age: 28 years
Gender: female
Marital Status: single
Location: Dallas

Occupation

Receptionist at a Hotel

Annual Income

\$30,000

Education

High school

Behavior

Daisy...

- Very rarely buys products on full price
- Has no brand loyalty
- Searches mostly products based on best price or discounts

Goals

Daisy wants to...

- Use great discount offers and coupons
- Find cheap deals
- Buy best value products

Pain Points

Daisy's pain points are...

- High-priced items not on sale
- High delivery charges and taxes

Personas are typically created by generalizing common traits of our "best" customers.

The point is to create “real people” that our marketing is communicating with. A 28-year-old low-income Millennial female and a retired, high-income Baby Boomer surely don’t deserve the same marketing message.

If we always target the “ideal” customer persona, then our message will only reach a very small percentage of visitors. But most websites do exactly that. They only target one persona. Content is only personalized for the ideal customer, and companies can only hope other shoppers outside that cohort are engaged in the right way.

Ecommerce stores need a solution that takes them from generalization to personalization. And at scale.



The Personalized Customer Experience



CRO marketing communications focus on universal messages, not personal ones.

But the concept of the “average customer” is an illusion. There is no “universal message” that works for every single visitor.

The perfect message and content are different for everyone. The solution is personalization.

What Personalization Means to E-commerce

Personalization means customizing our website and messages based on the specific needs of visitors. The goal is for every visitor to receive the messages and content that’s most relevant to them.

Suppose we have a jewelry web store, and we have two visitors. One is a 26-year-old girl named Amelie who wants to buy a gift for her friend worth up to \$100. The other is a 38-year-old man named Ben who wants to buy a wedding ring worth about \$2,000.



Ben, 38

Looking for a wedding ring
around \$2,00



Amelie, 26

Looking for a birthday gift
around \$100

Should you market the exact same message and products? Of course not. Traditionally, marketers would simply average out the needs of all customers, with both Ben and Amelie receiving ads for products worth around \$1,000. Instead, Ben should receive content about selecting the perfect wedding ring. Amelie could be presented with a “Selecting the Perfect Gift” quiz with product ideas in the \$100 range.



However, personalizing messages like in the instances of Ben and Amelie requires knowledge of customer needs. Next, we'll dive into determining the needs of customers like Ben and Amelie and how to message them most effectively.

Why Data is Your Most Precious Resource

Although e-commerce retailers don't have the advantage of meeting customers face-to-face, they do possess one extremely precious asset: Data. Online shoppers leave a trail of useful information as they shop, and web store owners need to recognize just how valuable that data is.

Online retailers now have access to demographic, location-based, behavioral and scores of other data types. This data allows us to customize messages to visitors on an individual level.

A large retailer like Amazon has the resources to collect and analyze user data from millions of shoppers in an instant. That's why you probably feel like Amazon knows your product preferences. But smaller retailers can provide the same level of personalization with the right tools and strategies.

Here are some examples of different data types and customer relationships any e-commerce retailer can use:

| First time arriving to the page 0 clicks on the website | 1-10 clicks The visitors has already used the website | After identification E.g. subscribed to a newsletter or registered | After the purchase A well-known, identified customer |
|--|--|---|---|
| IP, Location | Browsing history | Email address | Purchase history |
| Campaign parameters | Website searches | CRM / newsletter data | Interests |
| Keywords | Time spent on pages | Form data | Price sensitivity |
| Landing page | Cursor movement, scrolling | Previous browsing | Satisfaction |

You can then personalize customer messaging in some of the following ways:

- **IP, Location:** If a shopper's IP address is from Germany, for example, we can show a popup informing him/her that we can ship items to Germany.
- **Campaign parameters:** If a visitor was referred from a Facebook campaign targeted at 25-35-year-olds, then we can assume that this visitor fits within that demographic.
- **Keywords:** If a visitor searched a "how-to" question and was referred to our store, we can assume a high likelihood of problem awareness.
- **Browsing history:** If the visitor reads three blogs on your site about racing bikes, then you should probably show him an ad for a racing bike.
- **Cursor movement, scrolling:** Looks like the visitor has been on the page for a minute now and even scrolled down to 80 percent of the content?

Then we can assume that he was interested in that particular content and read it.

- **Form data:** The visitor filled the “How to select a bike” quiz, and she selected the answers “from a city” and “woman.” From then on, we should communicate content that is related to these characteristics.
- **Interests:** Did the visitor buy iPhone accessories several times before? Presumably, he has an iPhone and it’s not worth recommending Android accessories to him.
- **Price sensibility:** Did the visitor buy during a special promotion or seasonal discount the last two times, or did he come from Google Shopping or Shopzilla? Then it is worth drawing his attention to the new promotions.

These are just a few examples. Depending on the industry, the web store, and even the marketing solutions used, different data may be useful to you.

Next, we’ll discuss how data can be used for personalization. We’ll present strategies and specific message types that may be appropriate at a specific level of customer awareness. And we’ll show how to target messages based on data types.

Personalization Techniques

Collecting and analyzing data is just the first step. Next, we’ll teach you how to personalize messages from your hundreds -- if not thousands -- of daily visitors at scale.

Personalization tactics fall into four categories:

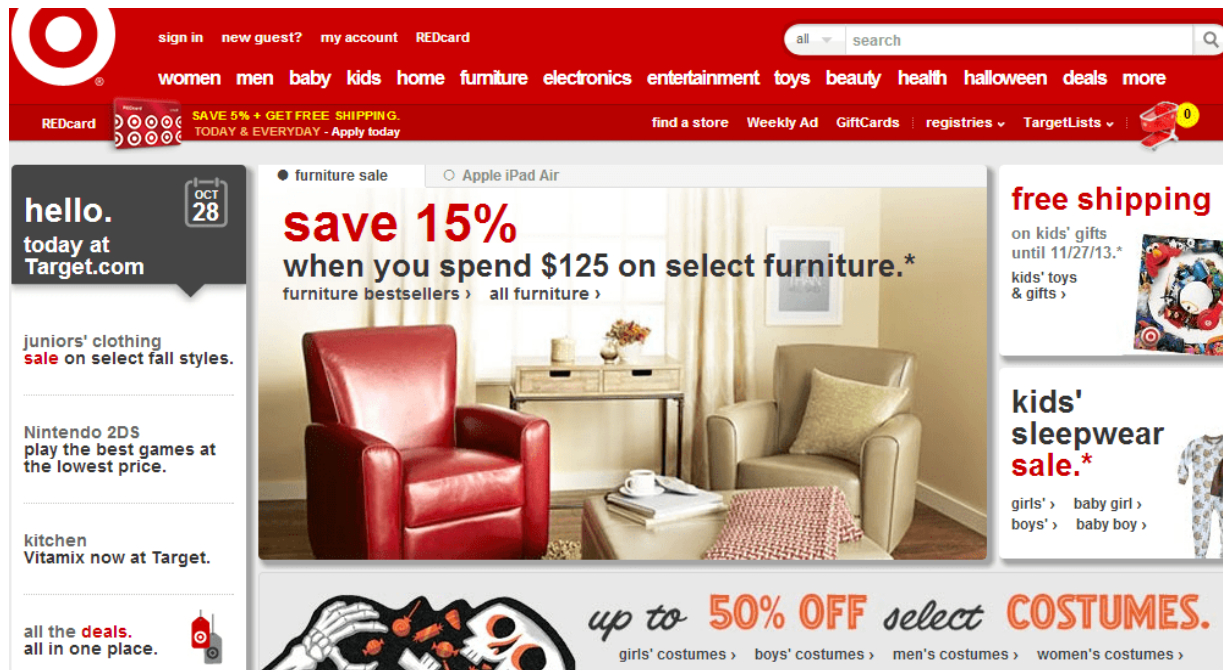
1. Message Customization
2. Segmentation
3. Dynamic Content
4. Layered Messages

Each tactic has unique advantages, disadvantages, strengths and limitations.

These techniques are not mutually exclusive and are often best used in combination with one another.

Message Customization

Multiple messages on a single page are best displayed side-by-side or below one another. After all, we don't know which message is going to resonate with our visitors. And this way we can improve our chances that the message will get noticed by shoppers.



But too much messaging can cause **analysis paralysis** amongst shoppers.

For websites “less is usually more”, especially when browsing on mobile devices. Today's visitors are impatient. They won't read each page thoroughly, and if the page is too noisy, they'll just exit.

It doesn't mean that we can't have more than one message on a page. But we definitely need self-control not to compress everything into one page.

Fortunately, we have additional opportunities to personalize messages so visitors will only see relevant messages.

Segmentation

Segmentation is a more advanced messaging method. We segment visitors based on common characteristics to show them different forms of content.

The most well-known example of segmentation is PPC ads. Visitors from different segments are directed to different landing pages. This way everyone will see the landing page that is expected to have the most relevant content for that visitor.



This works especially well with Google AdWords. Based on the keywords the visitor is searching for, it's easy to understand what stage he is in his own purchasing process. And what content is right for him.

If the visitor searches for the keywords...

- "how to buy a bicycle" → We can navigate her to a "How to choose a bike?" article.
- "cross bicycle" → It's worth directing her to the category page of cross bikes.
- "kellys clea 20" → We should bring this visitor directly to the product page of the Kellys Clea 20 female cross bike.

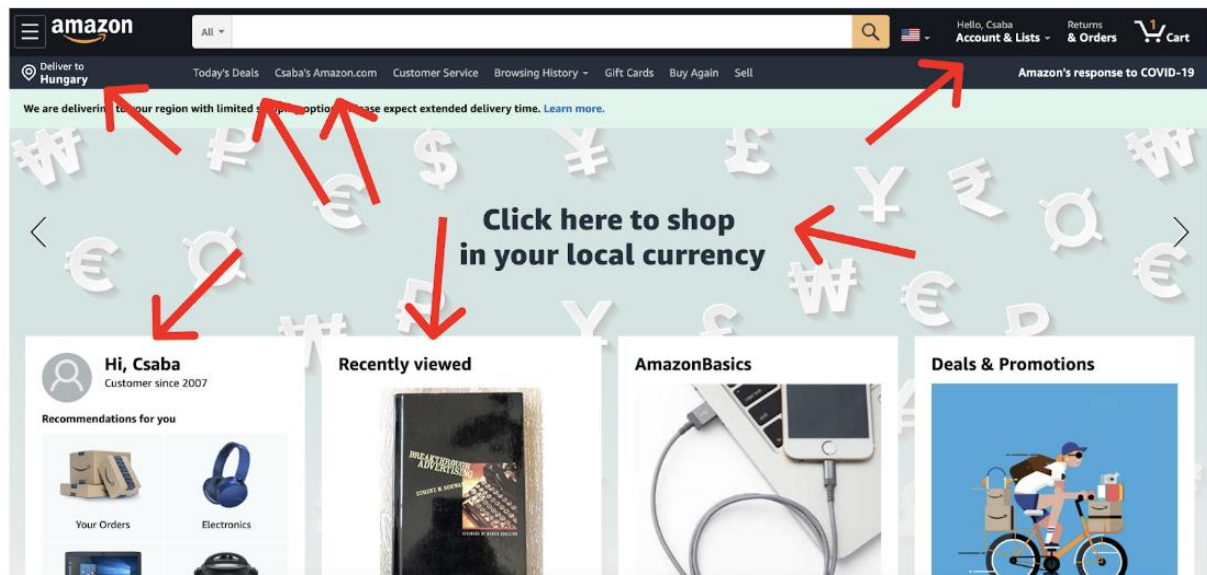
When used properly, segmentation is more personally engaging for visitors and reduces site bounce rates.

Segmentation is not only useful at the beginning of the visit but also throughout the whole purchasing process. Optimally, every message a visitor may encounter is targeted towards some segment – and not just a general message meant for everyone.

Dynamic Content

Dynamic content adds an even higher level of personalization. You can display the same content in two different ways to two different visitors based on their preferences.

Here's how Amazon uses dynamic content, with each instance highlighted.



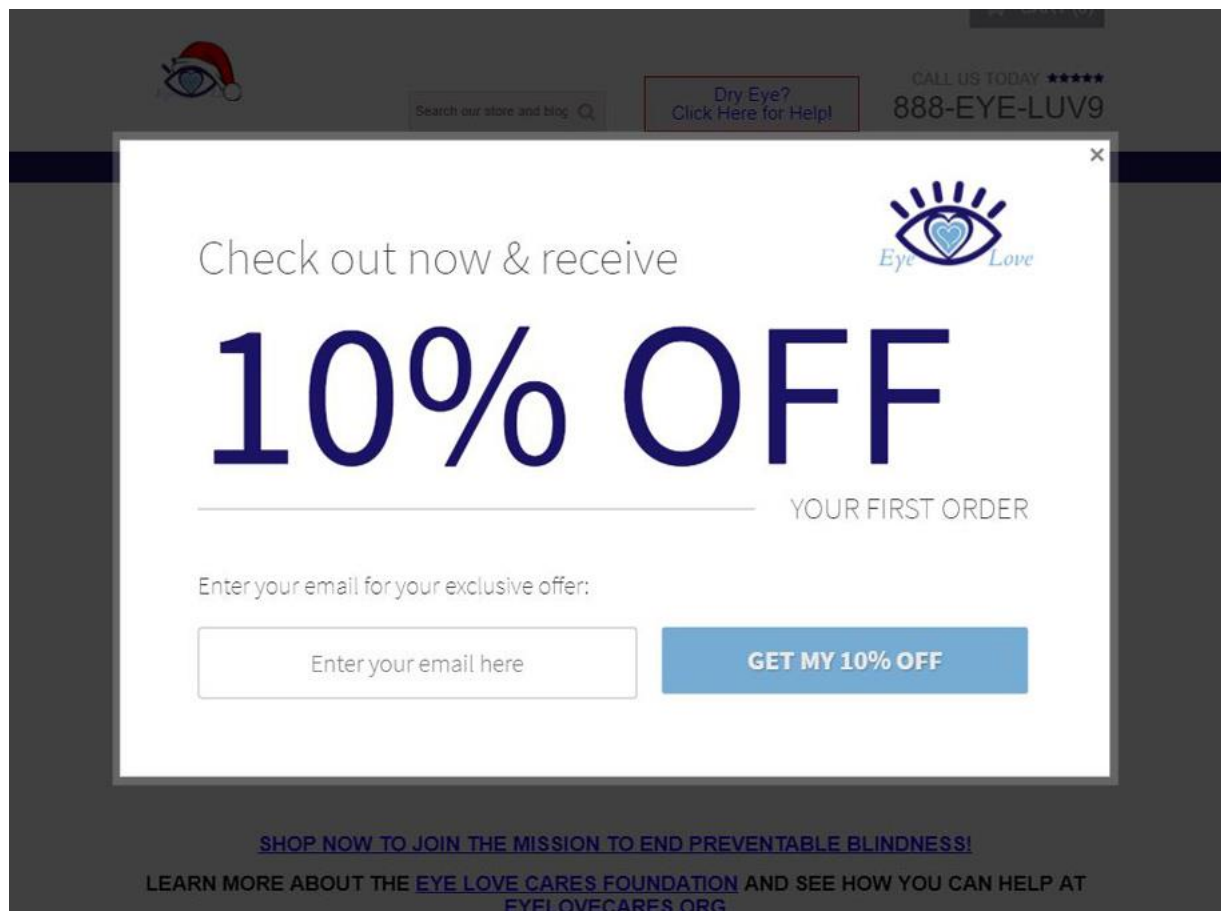
Dynamic content provides an end-to-end personalized e-commerce experience. However, there are two drawbacks to consider:

1. **Implementation:** Dynamic content isn't always easy to apply from a technical standpoint. At times you may need to insert complicated code in your content management system. We also need to be careful so that the dynamic content matches the style of the page and doesn't ruin the whole design. Large web stores are assisted by massive IT teams to implement dynamic content, but small web stores rarely have these resources at their disposal.
2. **Speed:** Most websites use a cache to achieve optimal loading times. This means that the page is already generated in advance and the web server just displays it. Personalized content makes this more challenging because if everyone has different content, each page must be rendered in real-time. Therefore, excessive use of dynamic content can lead to a deterioration in speed and negatively impact customer experience.

Layered Messages

Another technique is layered messaging. Layered messages don't display all the content of a specific page at once. Some of the content appears later -- according to certain rules -- that add an extra layer onto the page.

Popup messages are the most well-known form of layered messages. However, consumers don't necessarily always enjoy or like popups.



People dislike popups for two main reasons:

1. **Interruption:** Popups interrupt the visitors in browsing, buying, or any other action.
2. **Irrelevant:** Consumers get bombarded with messages that aren't relevant to their needs.

Message layering is about much more than throwing meaningless popups at every visitor. If used properly, layering can be a highly effective **Customer Value Optimization tool** for the following reasons:

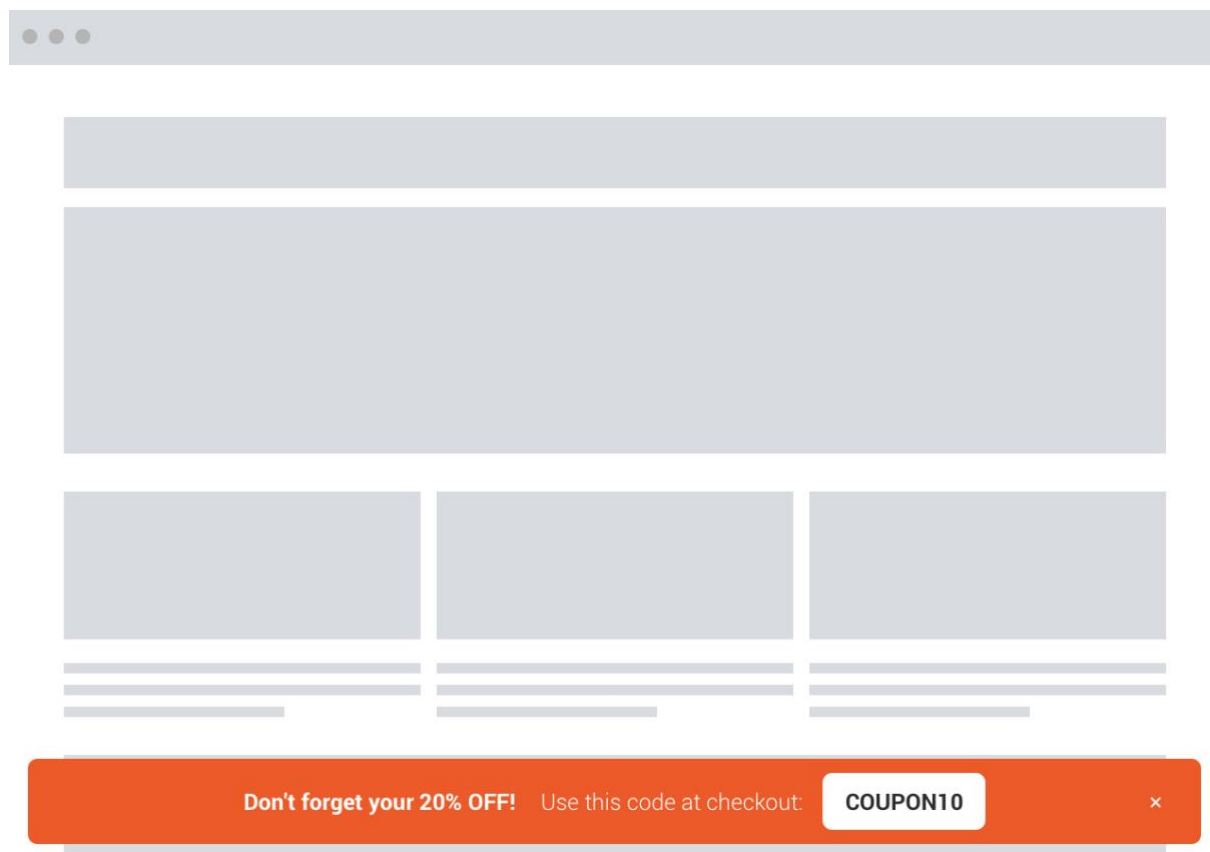
1. **Decrease Analysis Paralysis:** Layered messaging reduces the amount of content each visitor gets presented with, thereby reducing analysis paralysis. Messages appear at just the right moment and let users focus on one message at a time.
2. **Precise targeting and personalization:** A modern **Customer Value Optimization platform** like **OptiMonk** offers a wide range of targeting and personalization options. Visitors will only see the messages that are truly relevant to them.
3. **Easy to set up:** Layered messaging only requires inserting one line of JavaScript on your website. In some cases, you may not even need to do that. Layered messaging doesn't impact the functionality or performance of your website in any way.
4. **Less impact on site speed:** The biggest technical challenge to personalization is how certain technology impacts website speed. That's because the system must generate unique content in real-time before displaying pages. This isn't a problem with message layering. The basic content appears immediately, while the system has time to "calculate" individual content in the background before that message appears in a new layer.

But there is such a thing as layered messaging overload. You may communicate too many irrelevant messages to the users too aggressively. Message layering should therefore be used strategically and in moderation.

Here are some ways you can employ message layering:

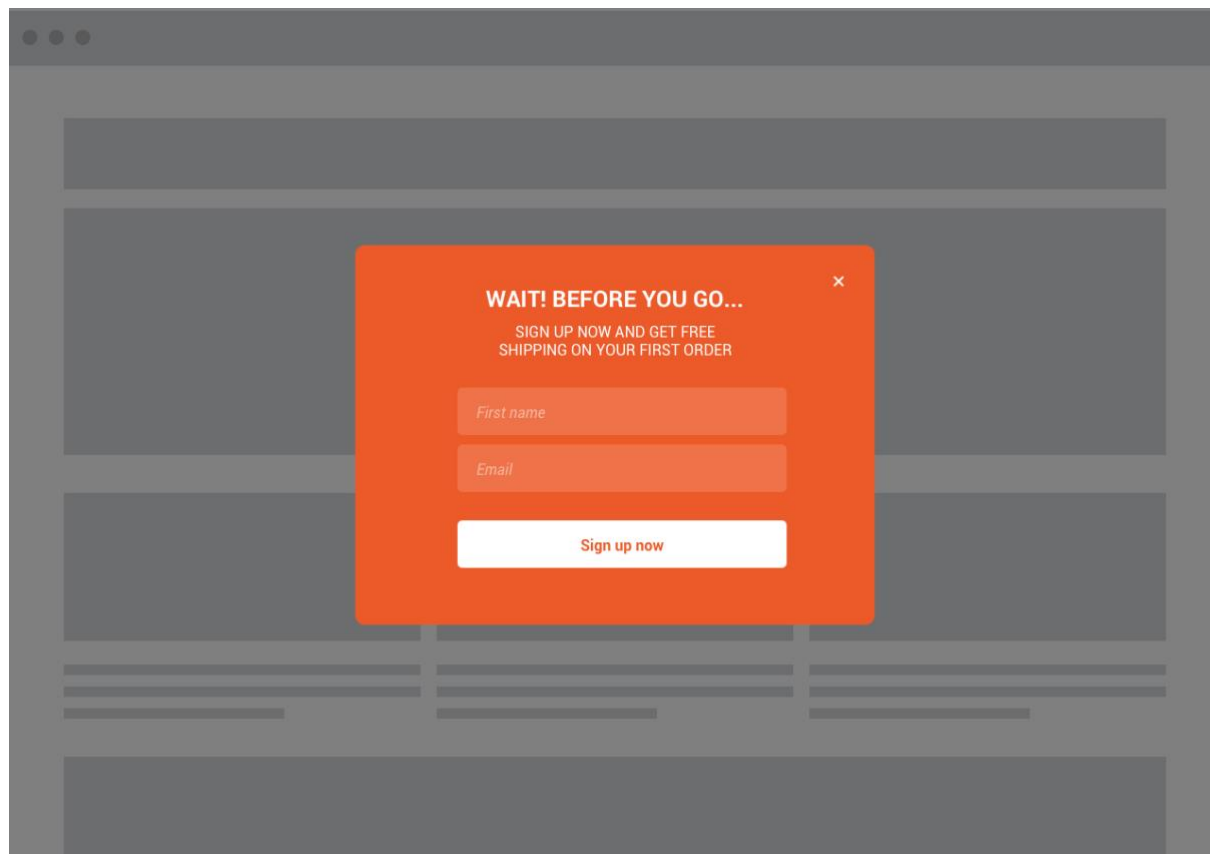
1. Sticky Bars

The Sticky Bar is a thin message bar floating at the bottom or top of the page. It is the most elegant solution for layering messages. It doesn't interrupt the visitor while browsing and only appears in a small thin bar at the top or bottom of the page. You can also add animations to make your message stand out more.



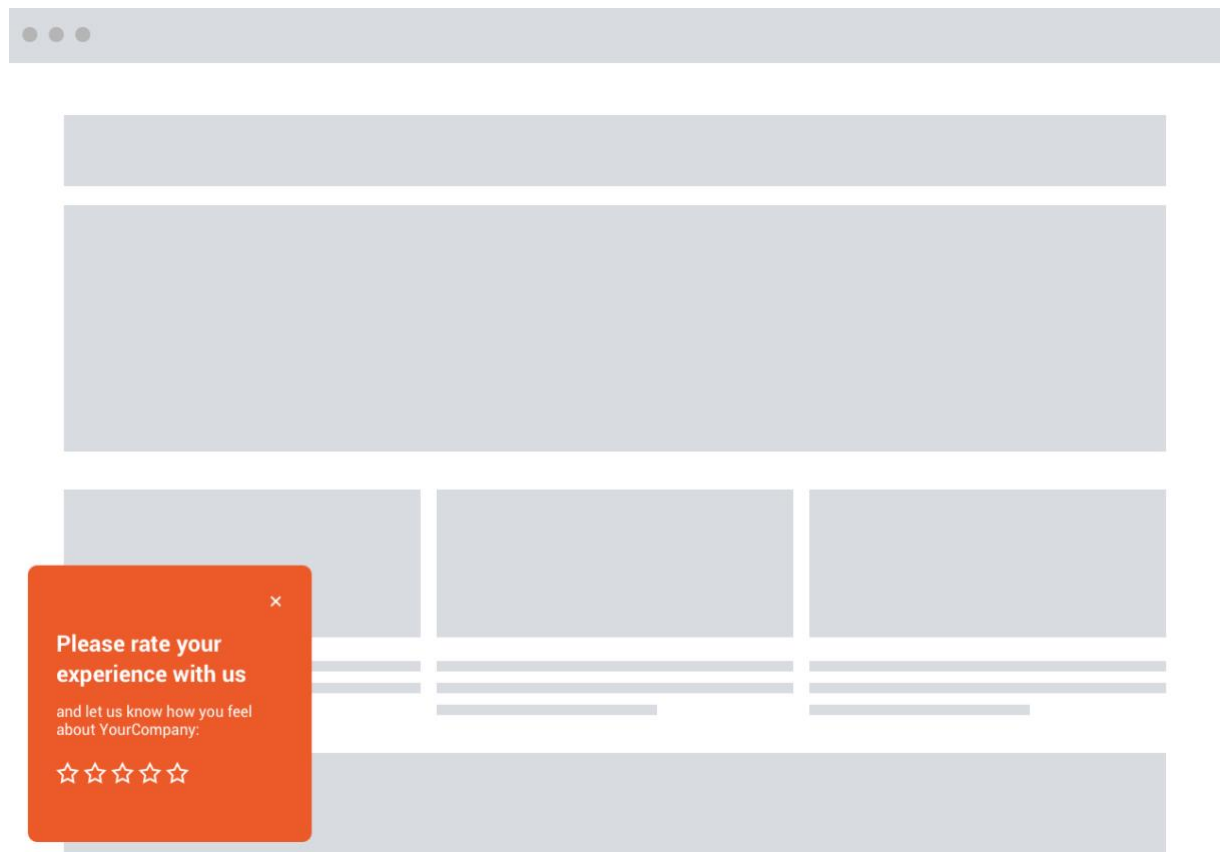
2. Popups

Popups are the most classic examples of layered messages. In most cases, it's a good idea to set them up on "exit-intent." That means popups don't appear immediately when a visitor arrives at the page. Popups appear only when users drag the cursor out of the page and they are about to leave.



3. Side-messages

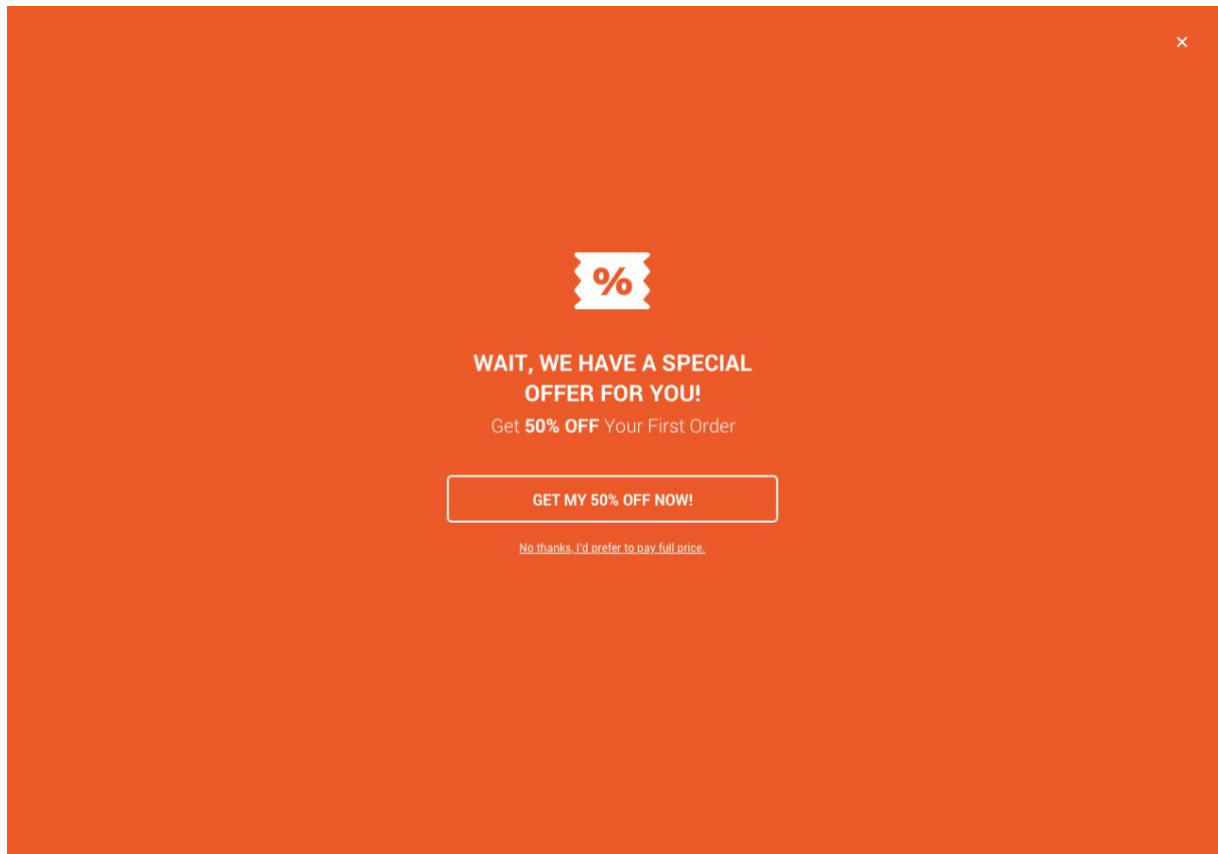
Side-messages are a more discrete version of a popup. It's less eye-catching. But side-messages bother visitors less because users can continue browsing while the side message appears.



Because users can still browse, side messages are much less annoying as they aren't interrupting the users. They only appear when they have stopped browsing on their own.

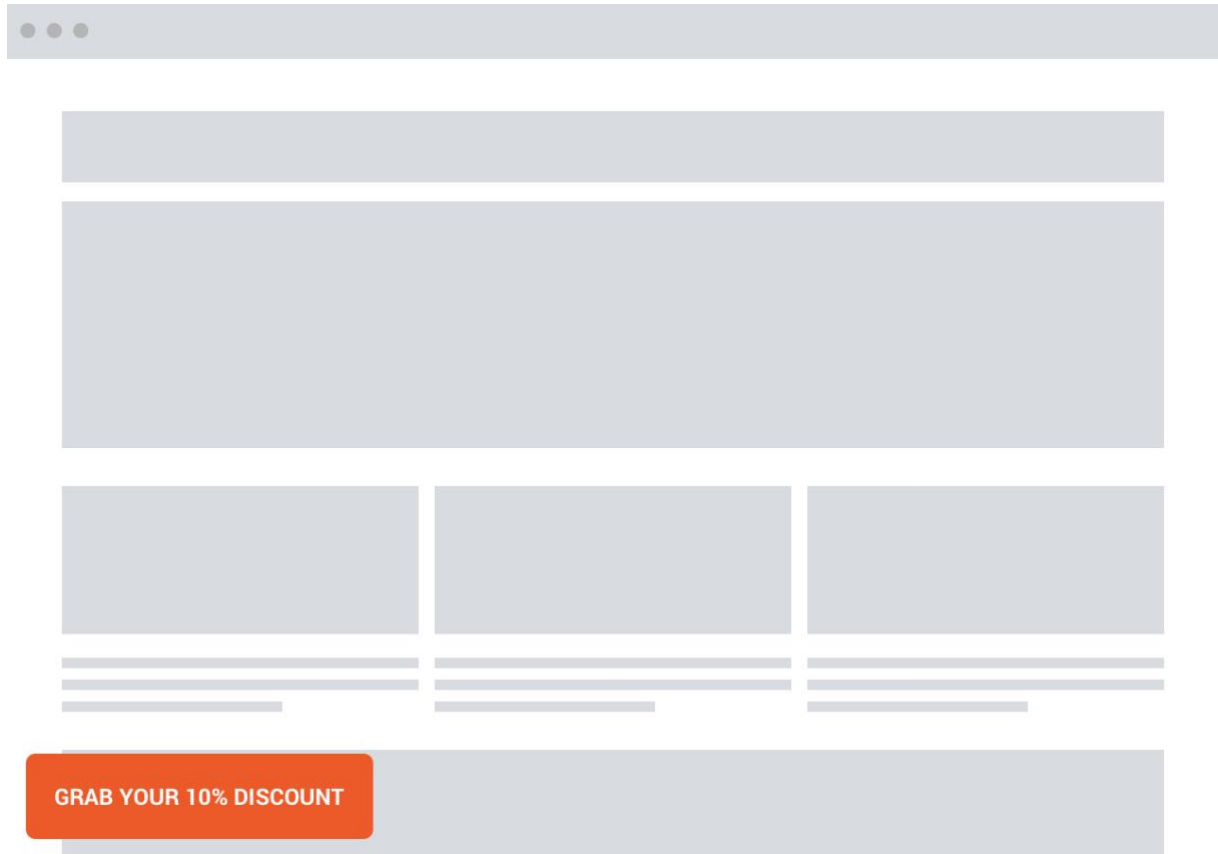
4. Fullscreens

Fullscreen messages demand undivided attention from the visitors. Since they interrupt the visitor while browsing -- just like a popup -- it's a good idea to use this on exit-intent.



5. Teasers

Teasers give users a sneak peek of a longer message. Show segments a specific message without disrupting their overall browsing experience.



Many e-commerce stores use teasers in combination with an exit-intent solution. Teasers allow users to view the message without disrupting their browsing experience. And if the visitor doesn't notice the teaser, they're certain to see the popup upon exit intent.

Now that you understand the intricacies of messaging customization, let's discuss the steps and principles of the CVO process.



The Five-Step Optimization Process



Before we discuss the steps of the optimization process, let's review a few principles that are worth adopting so you can get the most out of optimization both in the short and the long run. This will help you better understand the steps in the optimization process.

First, Customer Value Optimization is not a one-time event. It's a process and a way of thinking that never ends. There is no such thing as a perfect customer experience and there are always more opportunities for improvement.

Next, Customer Value Optimization has a learning curve that takes time. You may have plenty of ideas and feel the urge to set up a hundred different messages. However, we suggest that you start with three or four messages first. Try the system, see how it works, analyze the results and scale things as you learn.

Finally, implementing CVO takes ongoing experimentation. We always have ideas and theories about what's wrong with the customer experience at a particular page and how that could be improved. But all hypotheses about user behavior need to be tested and validated.

Fortunately, an advanced **Customer Value Optimization platform** allows us to test and measure the impact of our messages on the customer experience. This way, we can tell with certainty whether a particular message has a positive or negative effect on visitors.

Customer Value Optimization has five main steps:

1. Setting up the platform and collecting data
2. Analyzing data and exploring opportunities
3. Creating an optimization plan
4. Setting up campaigns
5. Evaluating results

Step 1: Platform Setup and Data Collection

Step one is setting up the selected **Customer Value Optimization Platform** and connecting it to your website. This is accomplished by simply inserting a JavaScript code into our site.

Just like Google Analytics, these platforms only measure and record data once their code is embedded in the website. Data is our gold mine. Without adequate data, it will be difficult to optimize the customer experience effectively.

That's why it's worth registering on your platform right now and inserting the code. Shopify web stores do not necessarily need to insert a code. It's sufficient to install the **OptiMonk** application in the store and everything else is done automatically.

You should also check Google Analytics measurements to ensure the data about your visitors and their behavior is properly displayed on the Google Analytics interface. Also verify that the conversion and purchase measurements are working so that e-commerce tracking is set up correctly.

It's also worth setting up other analytical and problem-solving software if you wish so that the required amount of data is collected as soon as possible. Then we can start analyzing it.

Once all data is available you can begin exploring opportunities. You may need to wait a few weeks for Google Analytics or other software to gather enough data for you to explore opportunities.

Step 2: Data Analysis and Opportunity Exploration

The first actionable step of Customer Value Optimization is to explore current issues with the onsite customer experience. Knowing exactly what problems exist with the current customer experience takes the guesswork out of solution delivery.

Here are some tools that you can use to make data-driven determinations about existing customer journey issues and how to fix them.

A. Analytics Tools

There are a plethora of analytics tools on the market, but we recommend Google Analytics and Conversific.

Both have several reports that can help us understand visitors' problems. We should be looking for segments, content, or landing pages that have a significantly lower conversion rate compared to others.

Below you can see that a surprisingly large number of visitors arrive at this page from Instagram. But their conversion is still much lower than the visitors' from Facebook. Even though you might presume that these two segments are quite similar.

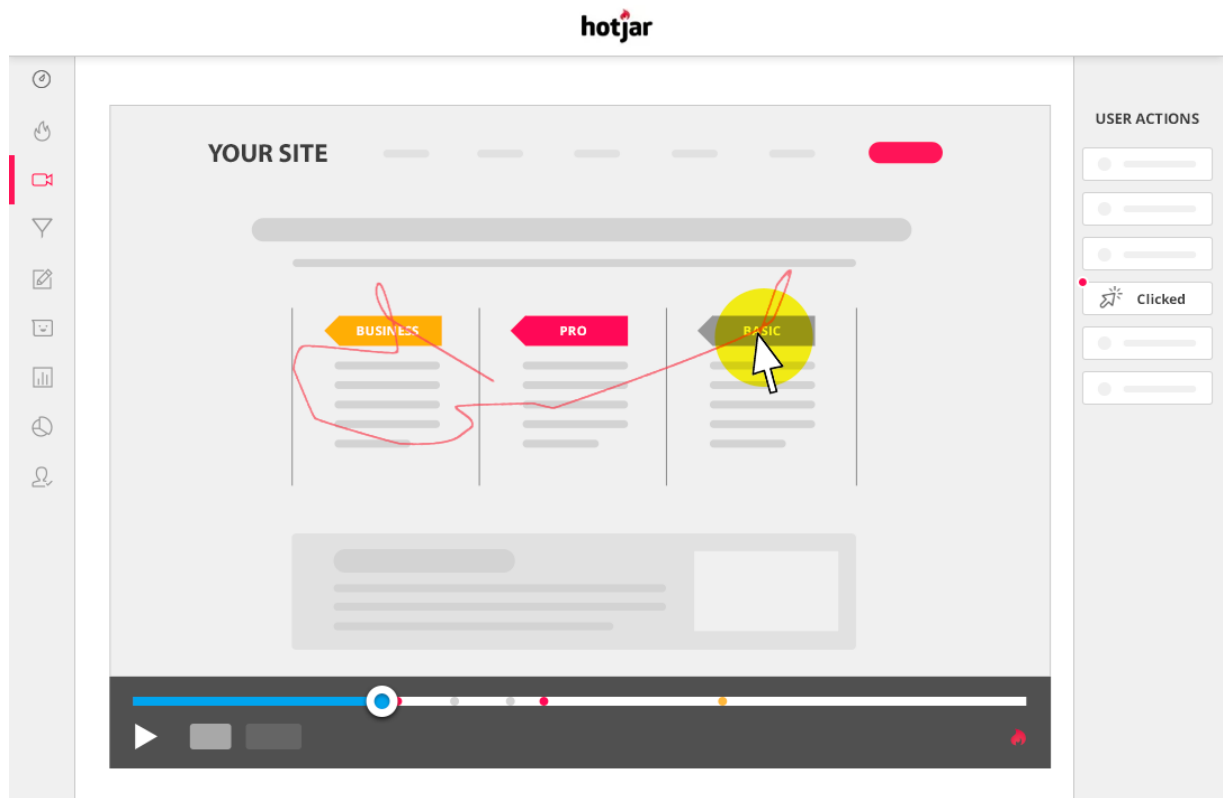
| Source / Medium | | Acquisition | | | Behavior | | | Conversions | | | eCommerce | |
|-----------------|--|---|---|---|---|---------------------------------------|---|---|---|---|-----------|--|
| | | Users | New Users | Sessions | Bounce Rate | Pages / Session | Avg. Session Duration | Ecommerce Conversion Rate | Transactions | Revenue | | |
| | | 706,487 % of Total: 100.00% (706,487) | 653,155 % of Total: 100.19% (651,921) | 861,587 % of Total: 100.00% (861,587) | 36.15% Avg for View: 36.15% (0.00%) | 2.16 Avg for View: 2.16 (0.00%) | 00:06:29 Avg for View: 00:06:29 (0.00%) | 2.53% Avg for View: 2.53% (0.00%) | 21,816 % of Total: 100.00% (21,816) | \$1,164,526 % of Total: 100.00% (1,164,526) | | |
| 1. | (direct) / (none) | 203,157 (27.31%) | 191,208 (29.27%) | 235,968 (27.39%) | 35.32% | 1.99 | 00:07:22 | 1.89% | 4,451 (20.40%) | \$229,069.37 (19.66%) | | |
| 2. | m.facebook.com / referral | 126,360 (16.98%) | 111,076 (17.01%) | 144,749 (16.80%) | 44.97% | 1.82 | 00:04:00 | 2.43% | 3,516 (16.12%) | \$192,027.97 (16.49%) | | |
| 3. | instagram.com / referral | 120,362 (16.18%) | 112,433 (17.21%) | 126,094 (14.64%) | 46.44% | 1.54 | 00:01:45 | 0.74% | 931 (4.27%) | \$49,304.90 (4.24%) | | |
| 4. | google / cpc | 57,830 (7.77%) | 53,713 (8.22%) | 77,342 (8.98%) | 28.82% | 2.55 | 00:09:03 | 3.93% | 3,037 (13.92%) | \$158,536.43 (13.62%) | | |
| 5. | google / organic | 26,530 (3.57%) | 17,189 (2.63%) | 35,901 (4.17%) | 12.50% | 3.33 | 00:15:17 | 4.32% | 1,550 (7.10%) | \$85,571.03 (7.34%) | | |
| 6. | facebook.com / referral | 20,110 (2.70%) | 18,099 (2.77%) | 22,986 (2.67%) | 33.19% | 2.20 | 00:06:47 | 2.71% | 622 (2.85%) | \$34,702.02 (2.98%) | | |
| 7. | facebook.com / referral | 14,592 (1.94%) | 14,210 (2.18%) | 14,815 (1.72%) | 82.52% | 1.32 | 00:00:58 | 0.44% | 65 (0.30%) | \$3,386.05 (0.29%) | | |
| 8. | afterpay / referral | 14,305 (1.92%) | 13,129 (2.01%) | 16,160 (1.88%) | 25.24% | 3.49 | 00:07:48 | 4.62% | 747 (3.42%) | \$42,692.21 (3.66%) | | |
| 9. | Last 200 Days Engaged / campaign-email | 10,198 (1.37%) | 7,232 (1.11%) | 12,799 (1.49%) | 27.94% | 2.32 | 00:10:16 | 2.74% | 351 (1.61%) | \$20,988.77 (1.80%) | | |
| 10. | instagram.com / referral | 9,268 (1.25%) | 7,991 (1.22%) | 9,882 (1.15%) | 27.46% | 2.38 | 00:04:29 | 2.61% | 258 (1.18%) | \$13,191.12 (1.13%) | | |

But numbers don't tell the whole story. However, they do leave clues as to what the major customer journey challenges are. If there is a page where an unusual amount of people leave, or where the bounce rate is exceptionally high, or where the conversion rate for an ad is very low, there are usually problems with the customer experience.

Extracting insights from analytics tools are a great starting point for implementing CVO. Analytics data allows you to view your customer journey from the buyer's perspective.

B. Heatmaps and click-tracking software

Heat-mapping and click-tracking software provide a good opportunity to examine the customer experience from the shopper's perspective. Tools like Hotjar allow us to record every cursor movement of the users and we can even watch that later in the form of a video.



C. Customer Service Questions

Customer service channels can be vital in uncovering common pain points of your users.

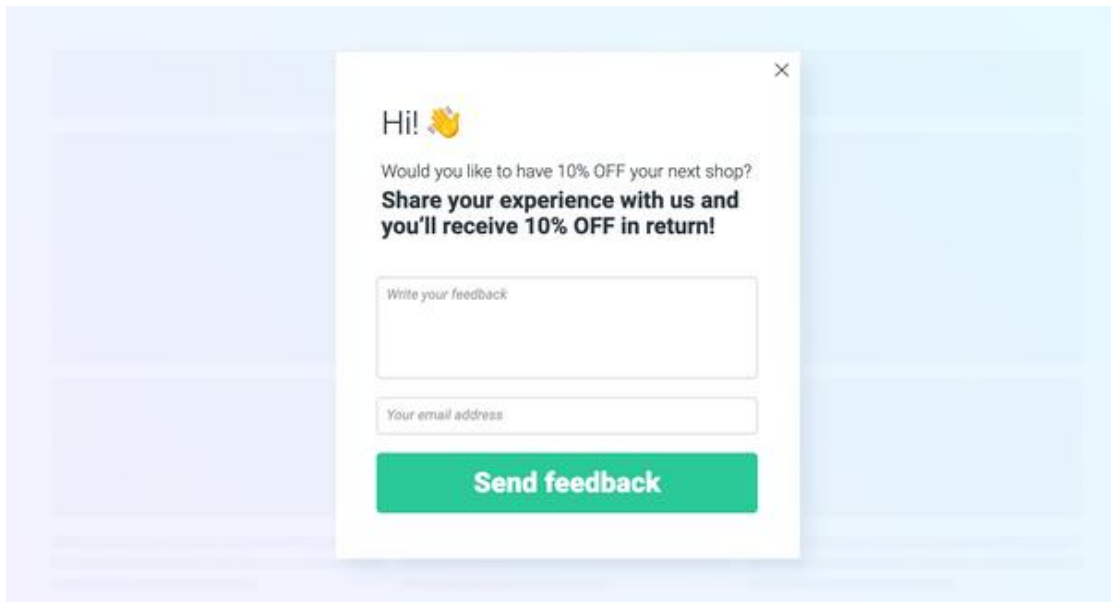
The problem is that most visitors simply exit your site without reporting issues or poor experience. So it's tough to know what actually went wrong.

Customer service feedback should be viewed not as a negative but as a free learning experience. You can then apply those pain points to improve your customer experience.

D. Surveys

If you want to make sure you learn about the issues affecting the customer experience, then ask the customers themselves. Fortunately, any decent **Customer Value Optimization platform** offers options for surveying customers.

- After completing the purchase, we survey customers about their satisfaction level. If they give a rating lower than five, it's a good idea to immediately ask what problems they encountered.

A white feedback survey popup with a close button (X) in the top right corner. It starts with 'Hi!' and a yellow star icon. The text asks if the user wants 10% off their next shop in exchange for sharing their experience. It includes a text input field for feedback and an email address field, followed by a green 'Send feedback' button.

Hi! 🌟

Would you like to have 10% OFF your next shop?

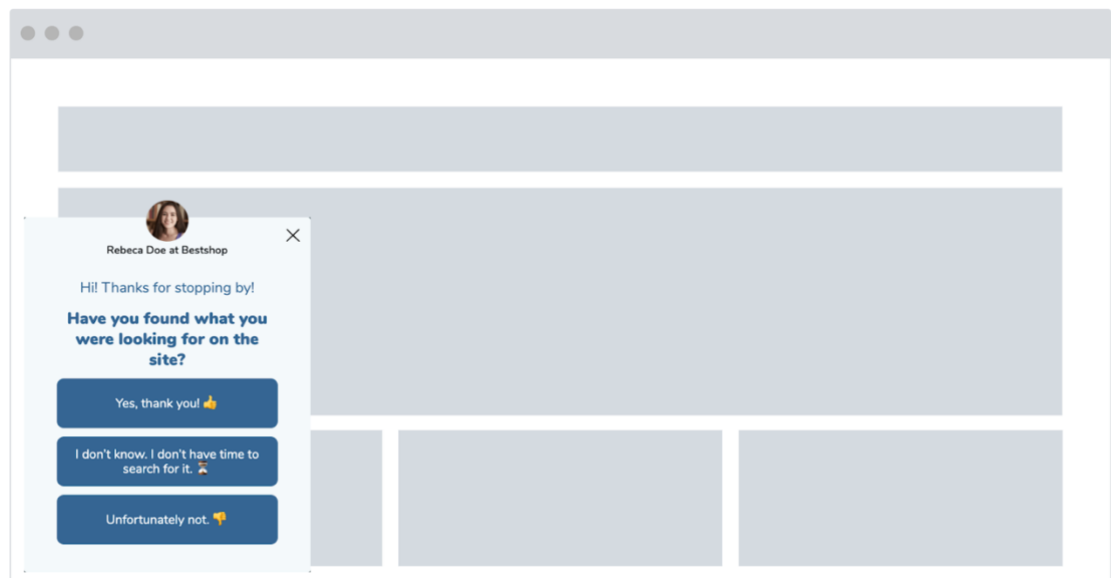
Share your experience with us and you'll receive 10% OFF in return!

Write your feedback

Your email address

Send feedback

- If there are pages where we sense problems, we can directly ask users in a side message if they have found what they are looking for:

A side message popup with a close button (X) in the top right corner. It features a profile picture of a woman and the name 'Rebecca Doe at Bestshop'. The message thanks the user for stopping by and asks if they found what they were looking for. There are three blue buttons with white text and icons for different responses: 'Yes, thank you! 🙌', 'I don't know. I don't have time to search for it. 🕒', and 'Unfortunately not. 🙁'.

Rebecca Doe at Bestshop

Hi! Thanks for stopping by!

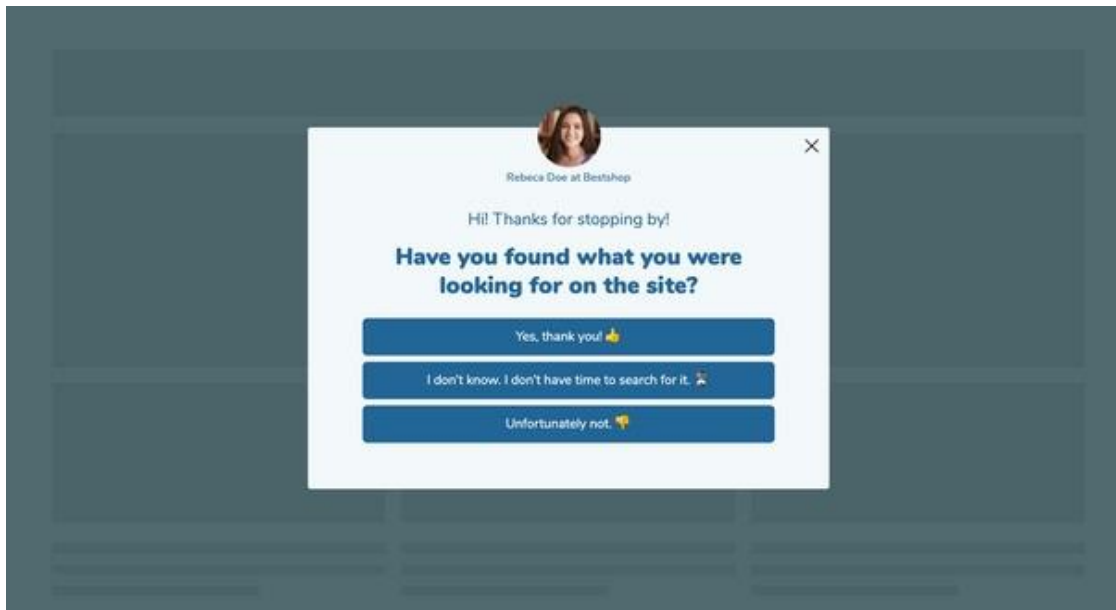
Have you found what you were looking for on the site?

Yes, thank you! 🙌

I don't know. I don't have time to search for it. 🕒

Unfortunately not. 🙁

- We can show an exit-intent popup for those who leave the page without making a purchase and ask them if they encountered any problem. That works with other types of content as well. After reading an article, we can ask if they liked it or not.



We can also send out a questionnaire by email. But that may not be the most effective method. Users don't even remember what was wrong with that site five minutes after the purchase, and we're much more likely to get answers if we ask them right away.

E. Customer Interviews

Customer interviews are the most accurate -- and expensive -- a method of gathering feedback on your customer experience. In customer interviews, you'll sit side-by-side with a customer as you ask them to navigate your webstore, perform specific actions and give you honest feedback.

It's best to constantly engage with subjects during interviews to keep them talking. This can elicit hidden responses that the subjects may not bring forth on their own. Screen-sharing interviews are also an option.

The problems we collect this way are all opportunities to provide a better customer experience for our visitors. Instead of problems, you should view them as opportunities.

Once the opportunities have been collected, you then prioritize them. It's not a good idea to start everything at once and create dozens of different campaigns. Instead, select the top three most important problems and create your optimization plan for each of those.

Step 3:

Creating an Optimization Plan

After collecting relevant data and uncovering opportunities, it's time to create an action plan.

Your optimization plan is a set of message ideas that outline potential solutions to your problems or opportunities.

The core of your optimization plan is prioritizing each opportunity from greatest potential to least.

| Opportunities with high priority | Opportunities with low priority |
|--|---|
| Visitors from abroad are less likely to buy | Willingness to buy is very low among readers of content pages |
| Returning visitors are less likely to buy | Micro-conversion is bad at the category pages regarding new visitors, they can't choose |
| Visitors at a lower stage of customer awareness are not well supported | Visitors from a mobile phone are less likely to buy |
| Cart abandonment rate is over 70% | Product PPC ads are converting poorly |

Let's look at the first high-priority opportunity: "Visitors from abroad are less likely to buy." What could be the solution to this?

To get to the solution, we need to think about why visitors from abroad are less likely to buy. Usually, the low conversion of foreign visitors is just a symptom of a more serious problem affecting customer experience.

There are several things that result in low purchase rates. Here are a few options:

1. Do non-English speakers browse the site?
(they usually bounce back immediately)
2. Is shipping too expensive?

3. Do we communicate the price for shipping abroad properly?
4. Is it clear that we ship to that country at all?

All of this is not easy to realize looking at the numbers only, we have to figure it out based on the available information. But the potential causes are usually relatively easy to define if we know our website and our customers well. Knowledge of the clientele and the website is key at this point. The numbers are only a guide, but the actual hypotheses should be based on business experience, customer feedback, and common sense.

Suppose we conclude that the main issue is lack of clarity around global shipping capabilities.

One solution could be a message communicating to shoppers that we do, in fact, ship to the country they're browsing from.



This message uses several core CVO personalization techniques:

1. **Segmentation:** The message is only shown to foreign customer segments.
2. **Personalization:** The message includes the name of the country the visitor is browsing from.
3. **Layering messages:** The message type is a Sticky Bar which is compelling enough for everyone to notice but it still doesn't disturb the user's browsing process.

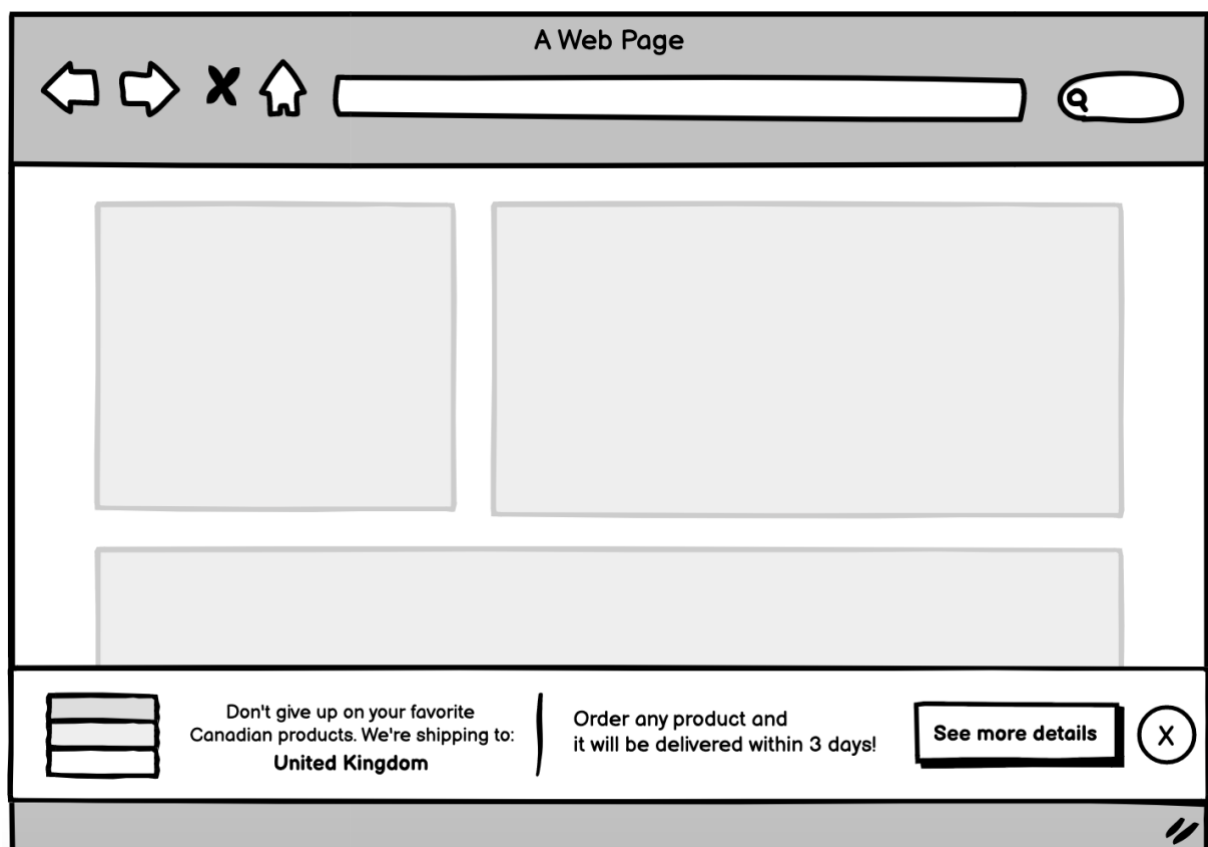
Suppose an American living in Europe wants to buy from your web store, but he is unsure whether you ship to his country. Do you think he will be annoyed by that popup or he will be happy to see that? Of course, the latter.

But not all problems can be solved by extra messages. Sometimes there's an existing message that's too ambiguous or needs to be modified. Or you just have too many messages and you should simplify that page taking a less is more approach.

Often the solution is to shut down an entire visitor acquisition channel. For example, if it turns out that conversions are low among people coming from abroad because they don't speak English, then -- unless we make our site multilingual -- then we need to shut down the acquisition channel altogether. You can do this by disabling the targeting of foreign countries in Google AdWords.

But in most cases, creating a better customer experience is well within the realm of possibility. We can create personalized messages that appear to the right people, with the right content at the right time. Creating an optimization plan is all about designing these messages.

For the sake of ease and simplicity, start with wireframes:



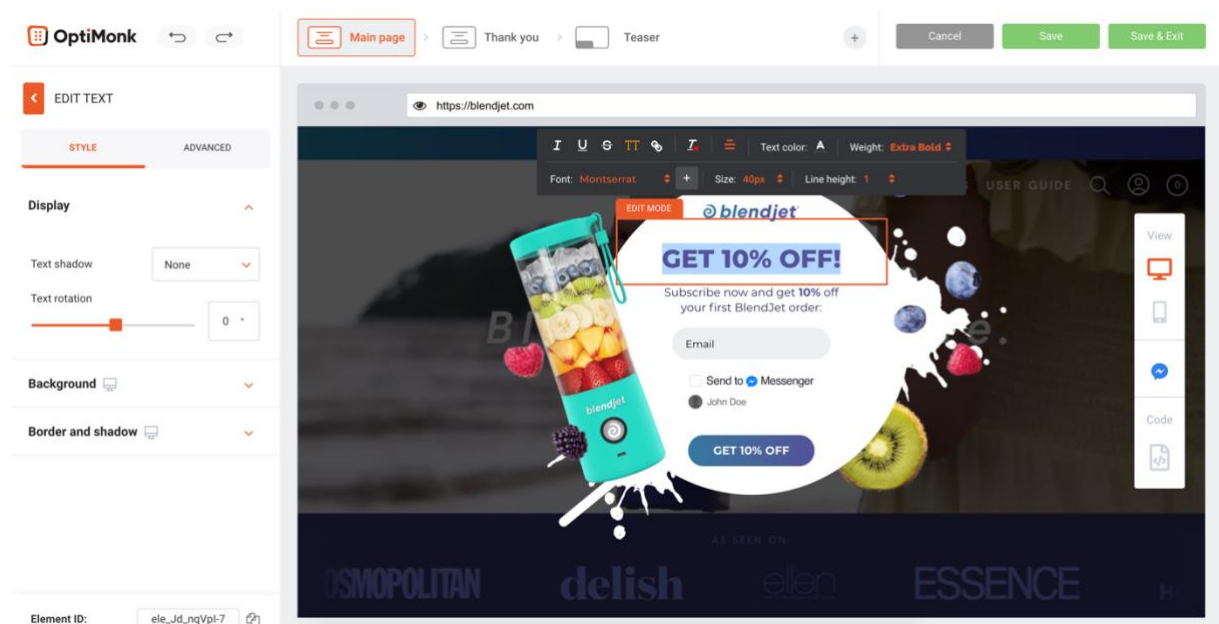
The next phase is bringing your ideas to life using campaigns in your **Customer Value Optimization platform**.

You can get started in a variety of ways. You can also do the planning phase directly on your **CVO platform**, as the advanced platforms provide very sophisticated options for editing. In fact, CVO platforms often offer many ready-to-use templates. Templates serve as a very good point of reference and inspiration, especially if you are still at the beginning of your CVO journey.

After you've formulated a message for each high-priority opportunity, it's time to start setting up your campaigns.



Step 4: Setting Up Campaigns



Campaign setup means that you're creating previously designed messages to fit the webpage and deliver the right message.




After you're done with the visual design, you can then set up the target audience for each message.

WHEN WILL THE POPUP SHOW UP


  **After x seconds**
When a visitor has been on the page for at least **3 seconds**


WHO SHOULD SEE THE POPUP

 **Frequency**
The popup will appear a maximum number of **1** times per visitor.

AND

 **Returning / New**
The popup will appear to **new visitors**

AND

 **Country**
The popup will appear to visitors from:
Austria
Germany
+ 19 more

The only way to enhance customer experience is to present relevant messages with minimal distraction. This is possible with the right targeting.

We suggest that you run campaigns with default A/B testing. With A/B testing, half of your visitors will see your campaigns, and the other half won't see them at all. Data resulting from each campaign will tell you whether your efforts had a net positive or negative effect on customer experience.

You can also compare the outcomes of various ideas and determine which were most effective. This helps inform the creative and messaging of future campaigns.

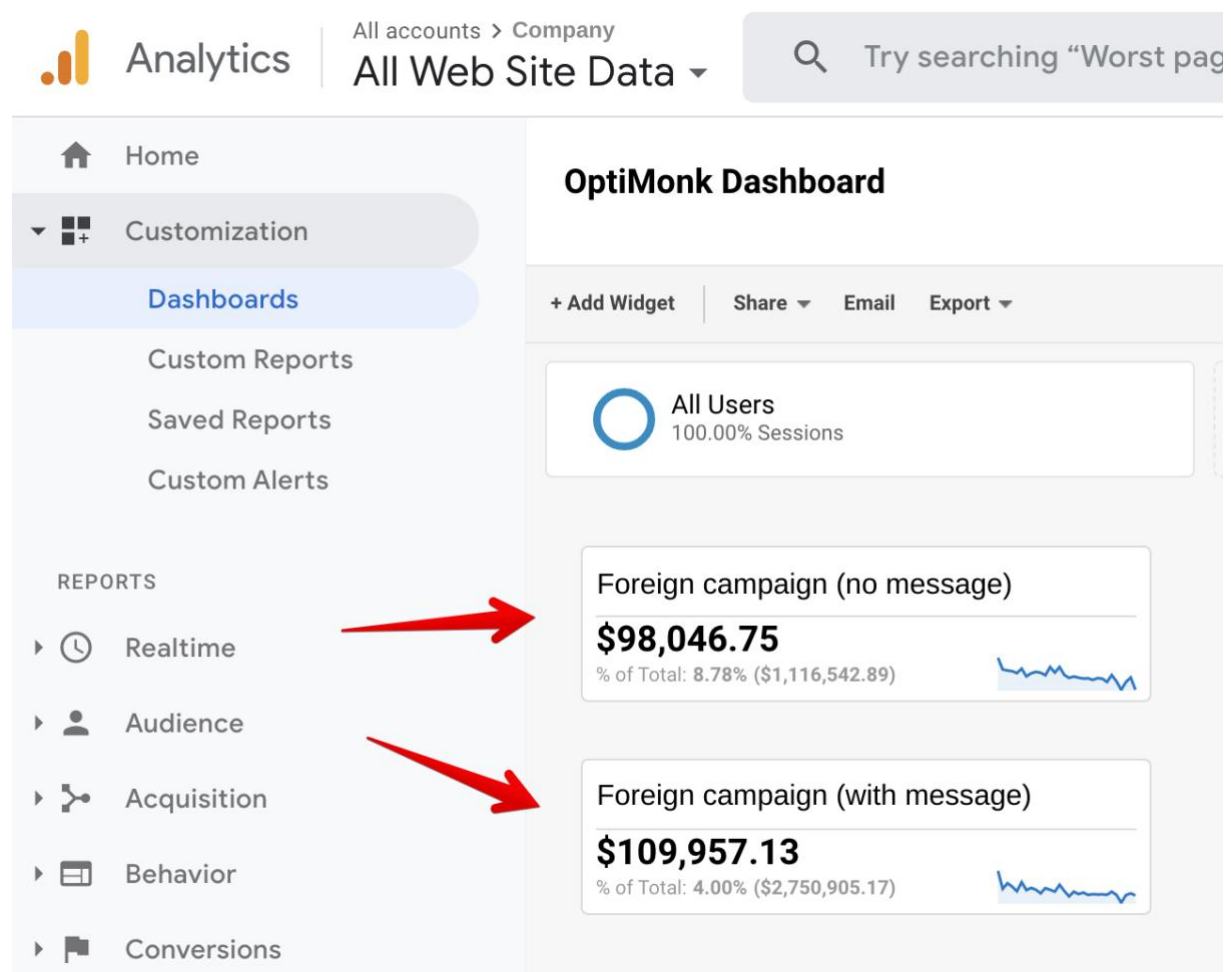
Step 5: Evaluating Results

The next step in the CVO implementation process is evaluating the results and deciding whether our hypotheses were correct.

Depending on how much traffic your site has, it may only take a couple of hours to gather enough data. But data analysis could take days or even weeks.

This is especially true if you are also A/B testing your campaigns and they are well-targeted. Thus, only a narrow segment of visitors can see them. In such cases, it may take a long time to gather enough data to determine which ideas are the most effective decisively.

You can evaluate the results on the interface of your **Customer Value Optimization platform** or on Google Analytics.



Google Analytics shows that website conversion improves by ten percent with the message than without.

If our hypothesis is valid, we can discontinue A/B testing and use only the most successful campaigns for future visitors.

Of course, we can run other A/B tests using slightly different messages, layouts, and targeting. We'll repeat the same analysis process for further improvement.

Implementing messages purely based on hypothesis can negatively impact the customer experience. However, this should be used as a learning experience. Analyze the validity of each hypothesis and test additional versions to find the right message.

The good news is that CVO technology automatically stops running poor performing campaigns, while continuing to run effective ones. Even if nine out of ten campaigns are ineffective, weeding out the bad ones and continuing with the winning messages will still yield positive long-term results.

Customer Value Optimization is an ongoing process. There's always room for improvement. Only our patience and resources are the barriers to how many new experiments we can run at once. And eventually, we'll reach the point where we say that a campaign is "pretty good" the way it is.

Over time, you'll get better at the optimization process. It'll be easier to create, configure and test new campaigns. And as customer-centricity permeates your everyday life, your teams will produce more creative ideas to help your customers.

In the final section, we'll inspire you with countless examples from the world of Customer Value Optimization.



Real World Strategies and Practical Examples



Now that we've learned the theory, it's time to see how CVO looks in practice based on each customer awareness stage.

1. Buyer Stage: Completely Problem Unaware

This stage is about providing help and creating value for users who aren't problem aware.

Here's how problem aware users typically land on your site:

- They saw an interesting ad on Facebook that piqued their curiosity
- They clicked on clickbait content that's not closely related to our product range but is still interesting
- They are returning shoppers who come back to the site from time to time to look around.
- They want to see if there is something new or exciting but don't have a specific goal. This is typical for clothing or luxury goods online stores.

In the most common scenario, a visitor does have some problem awareness. But his awareness is for a particular product range or category as a first-time site visitor. A shopper that knows he wants to buy shoes, for example, doesn't realize that he might also need a coat or t-shirt as well. That's where we use CVO to introduce those categories and draw shoppers' attention.

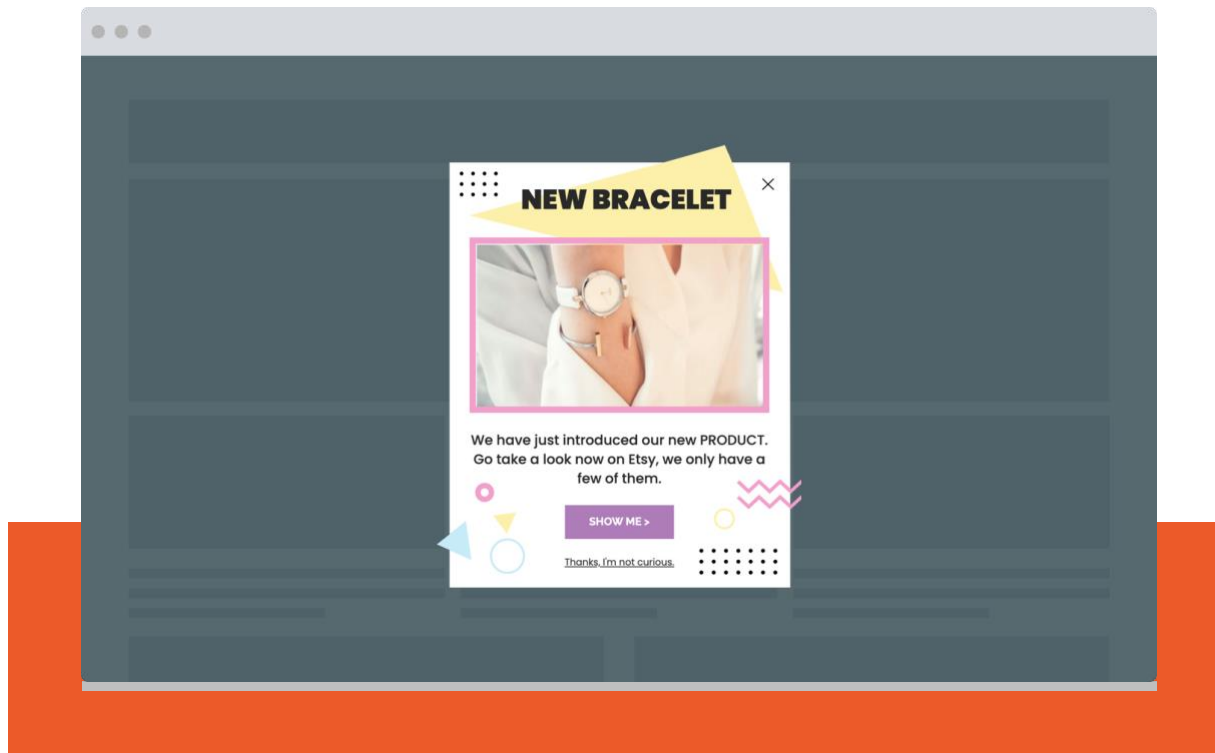
Our goal is to build problem awareness or arouse a desire for a specific product.

Here are some winning strategies:

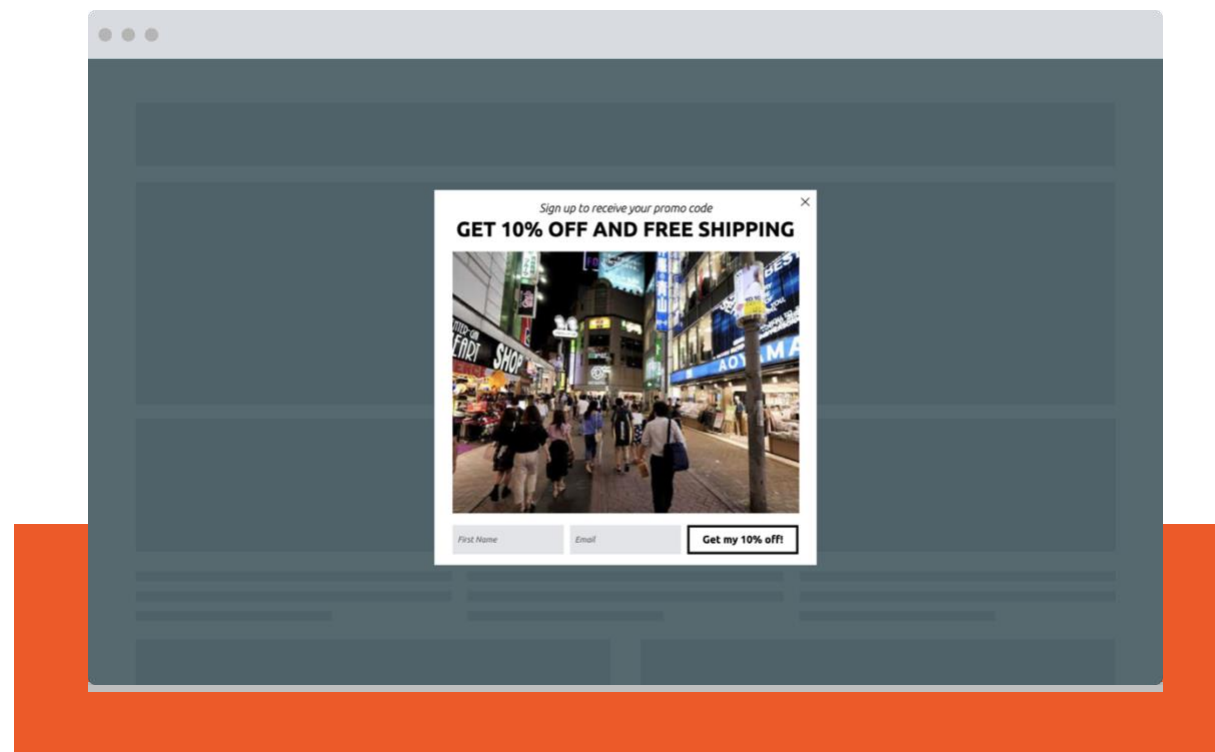
- Increasing desire and raising awareness with pictures or videos
- Promoting new products
- Building problem awareness with articles
- Gamification, games and entertainment

Now let's look at some specific examples and message types.

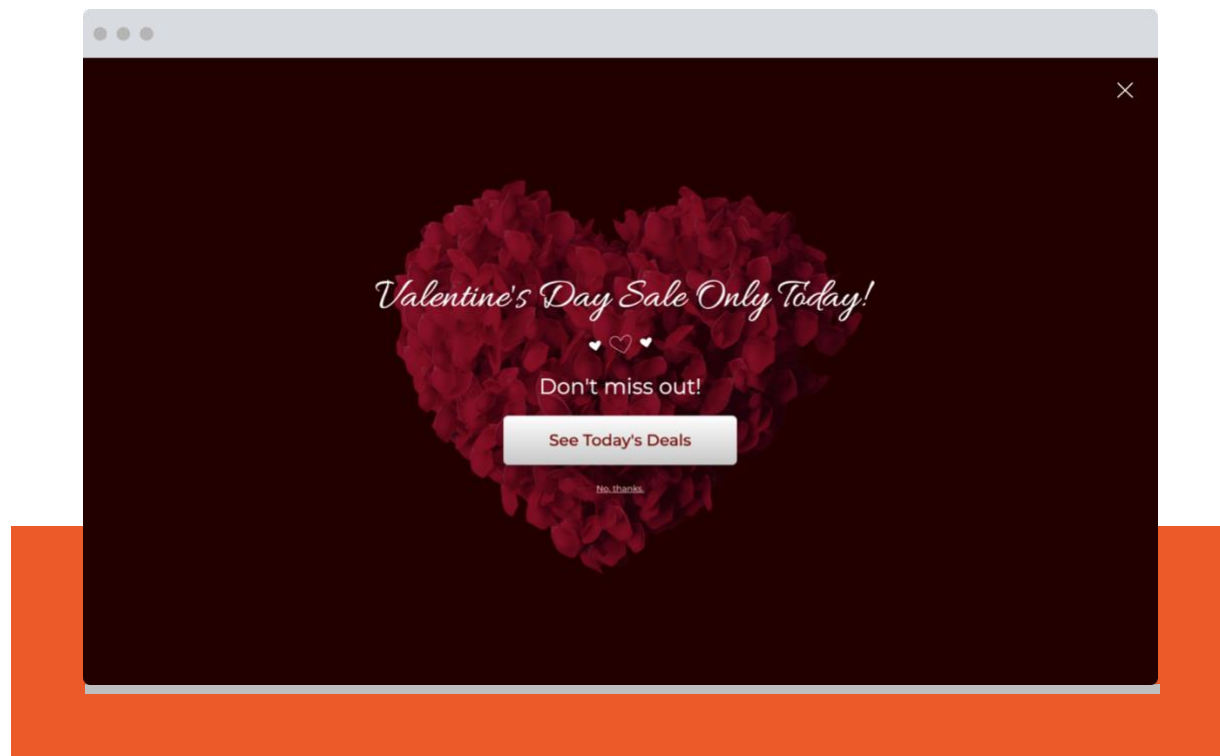
1. Promote new products for returning customers



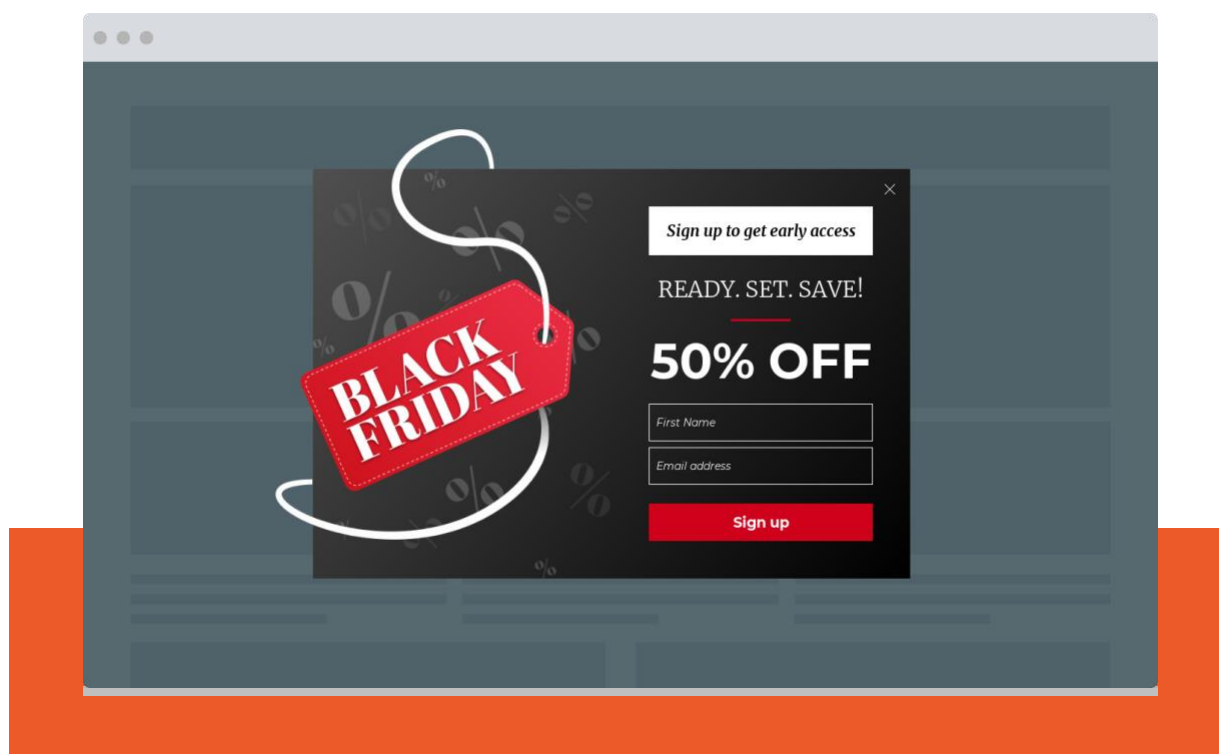
2. Use videos to raise awareness



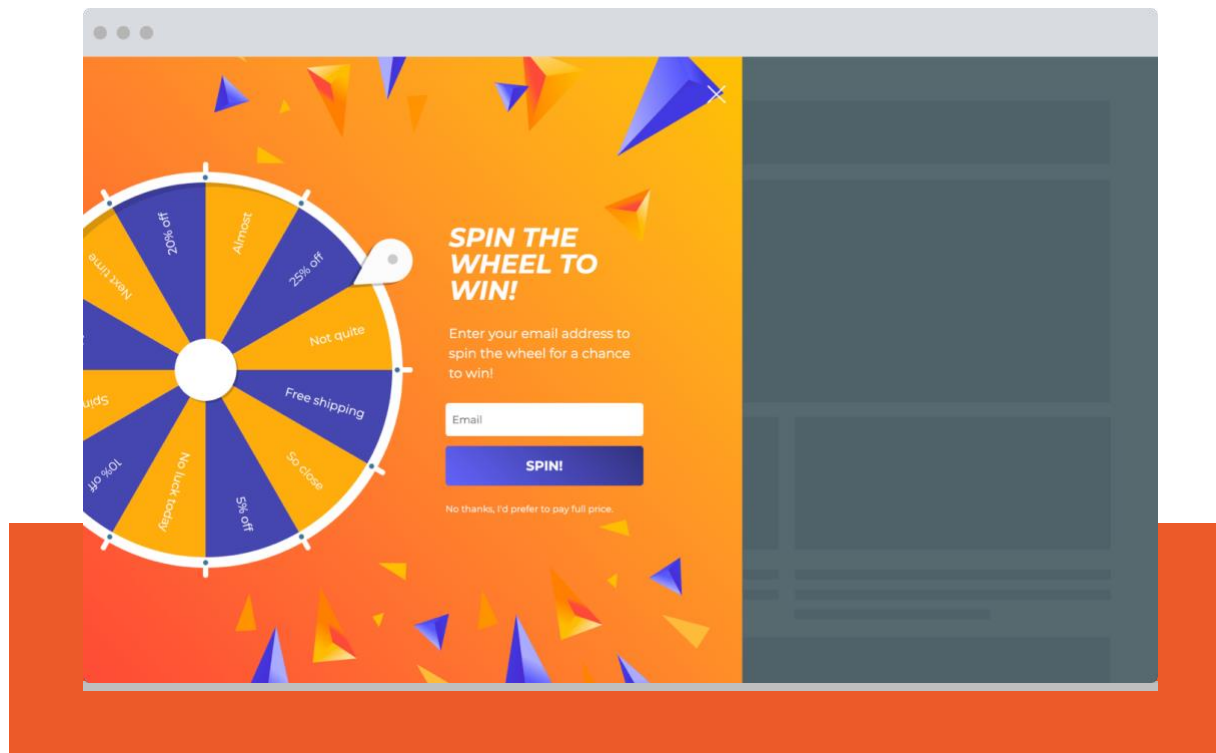
3. Promote seasonal offers



4. Build your list to prepare for seasonal campaigns



5. Use Lucky Wheels for a gamified user experience



2. Buyer Stage: Problem Aware Customers

Now the visitor knows they have a problem and is actively looking for solutions. Whether it's solving a pain point or acquiring something they desire, they're aware of what they want but unsure about how to get it.

How do we know that a customer is in the problem-aware stage? Here are some typical indicators:

- They click on a Facebook ad "How to lose 10 kgs in 10 days"
- They search for the keywords "advantages of cycling" in Google
- They use problem-based categorization e.g., opens the "Headache medicines" category
- They use the age-based categorization in a toy store – for example, "Games for children aged 3-5 years"

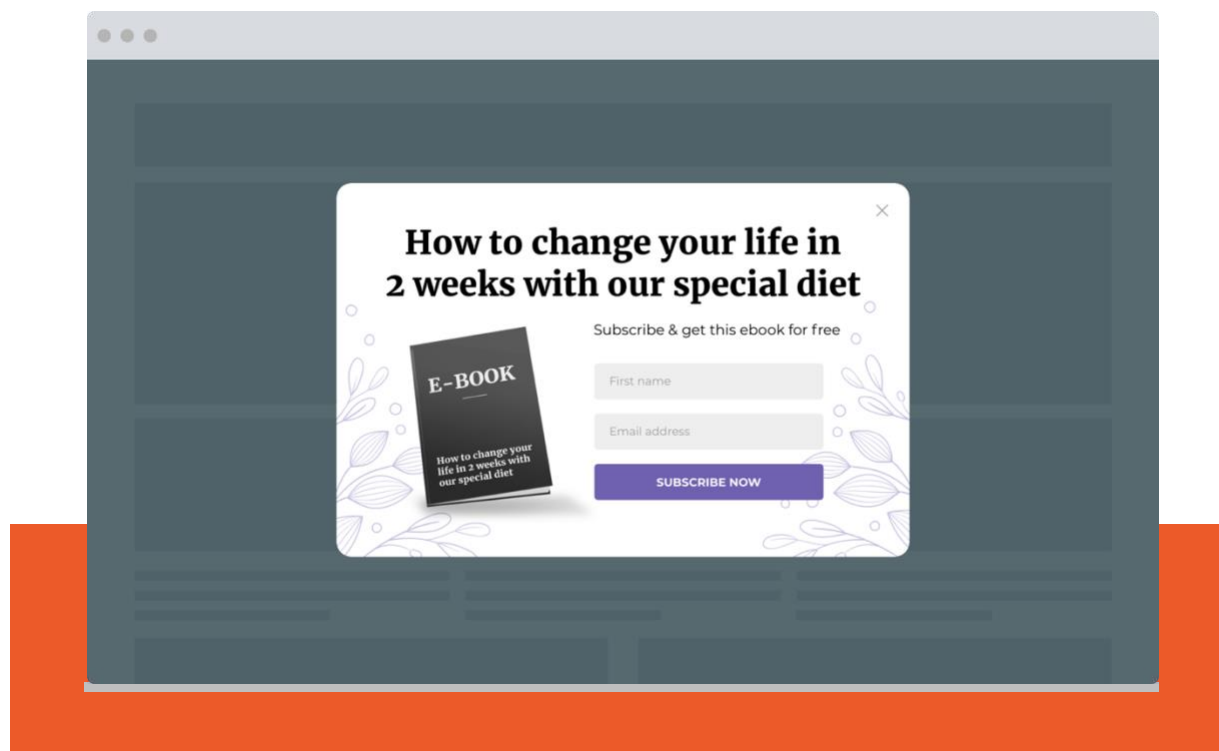
In these situations, our goal is to help the customer find a solution. That solution can either be a product category or a specific product.

How can we help customers? Here are some practical strategies:

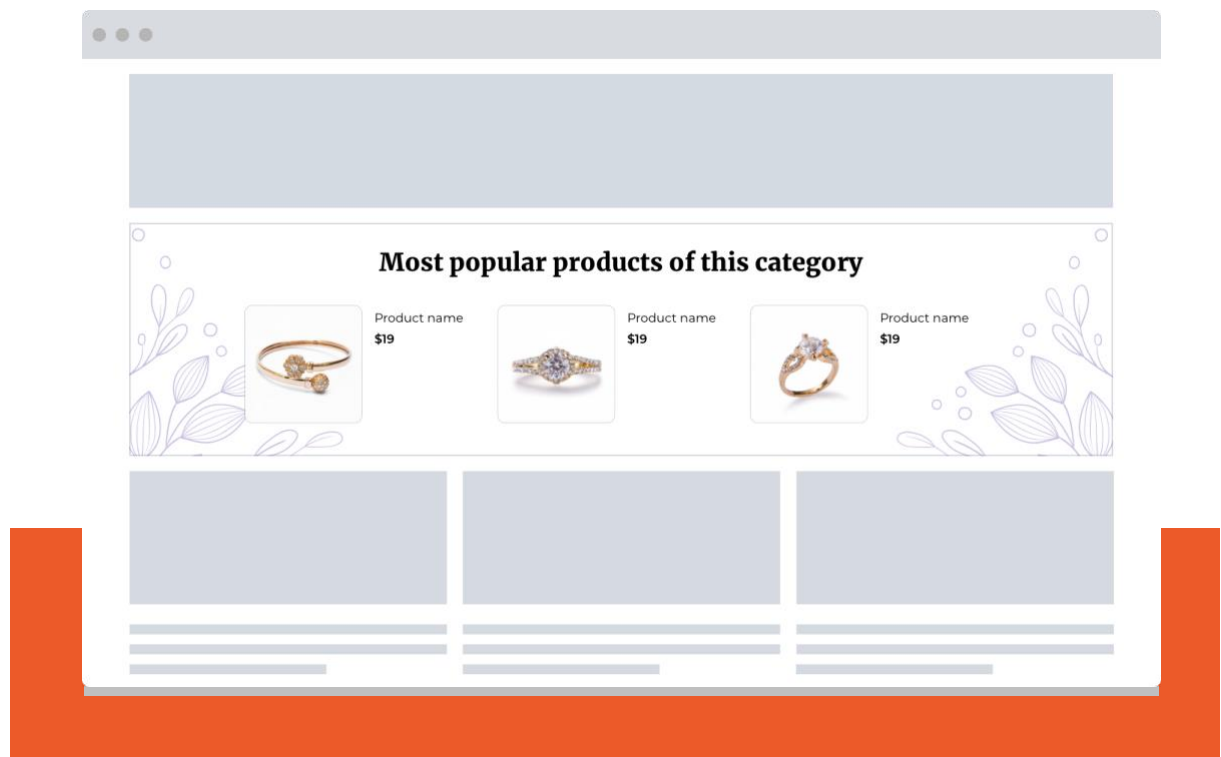
- Educate the customer about his problem
- Provide guides, articles or videos
- Categorization based on problems
- Surveys and questionnaires
- Most popular product recommendations

Let's see a couple of message types that you can use for helping your problem-aware customers:

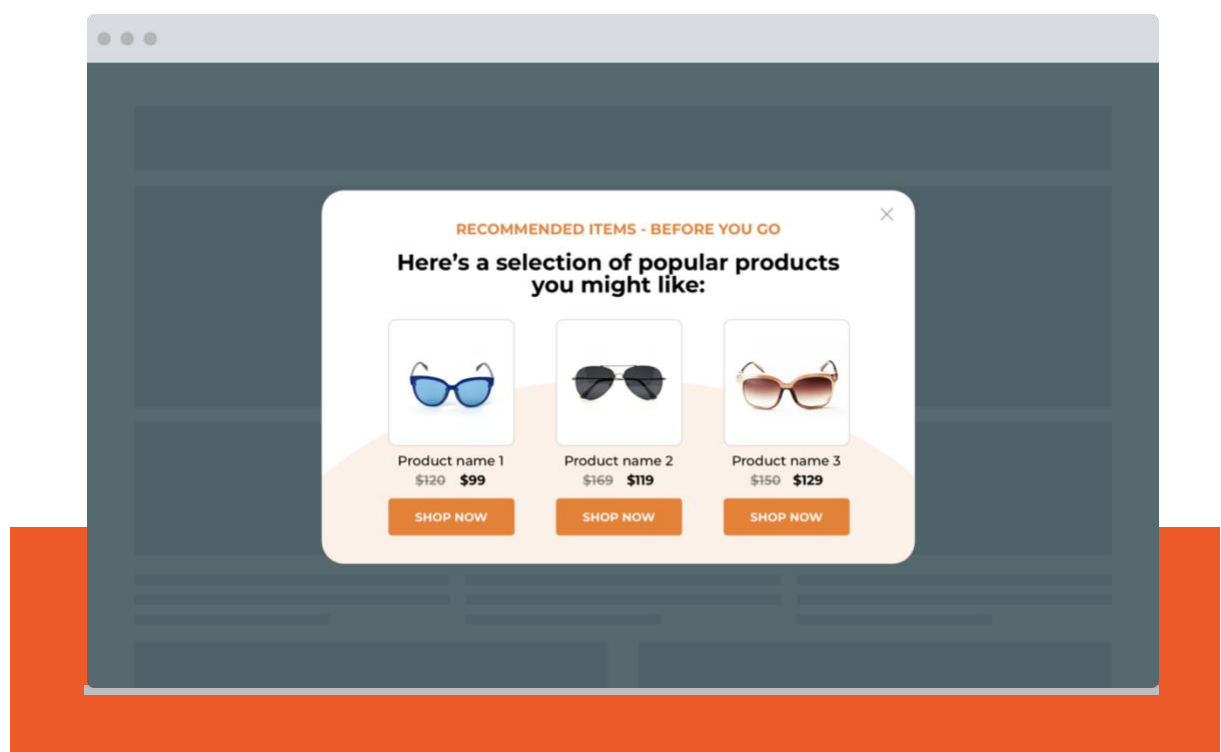
6. Promote ebooks as list building incentives



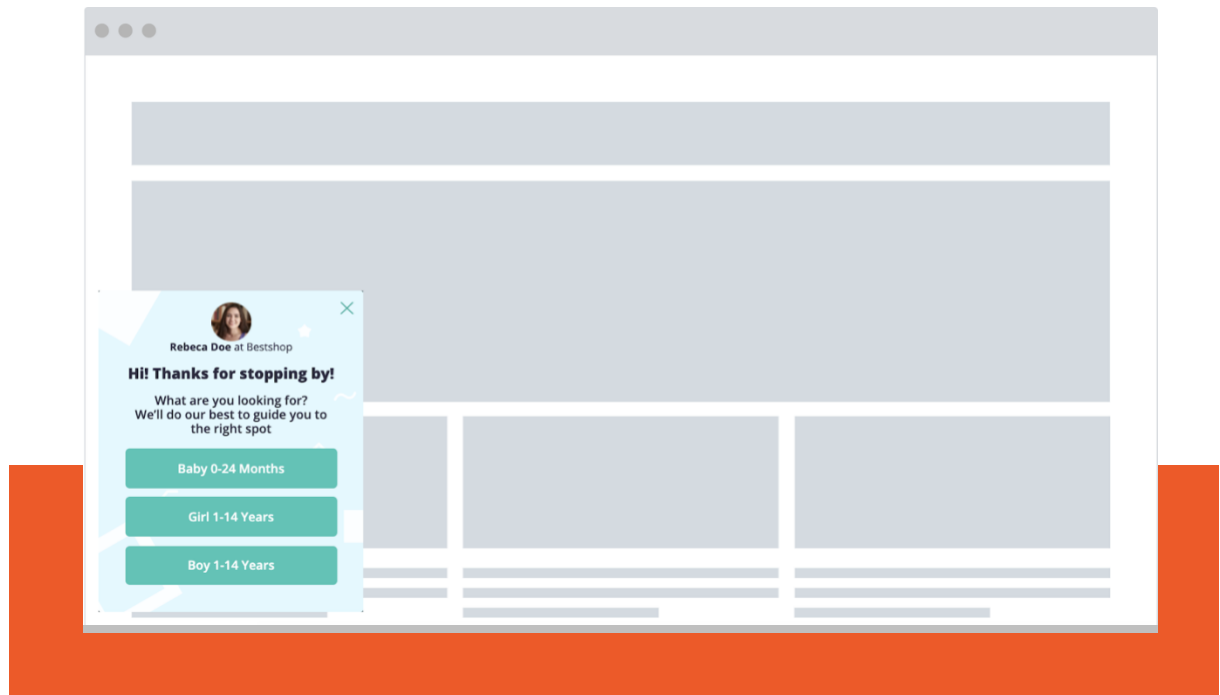
7. Recommend relevant products in blog articles



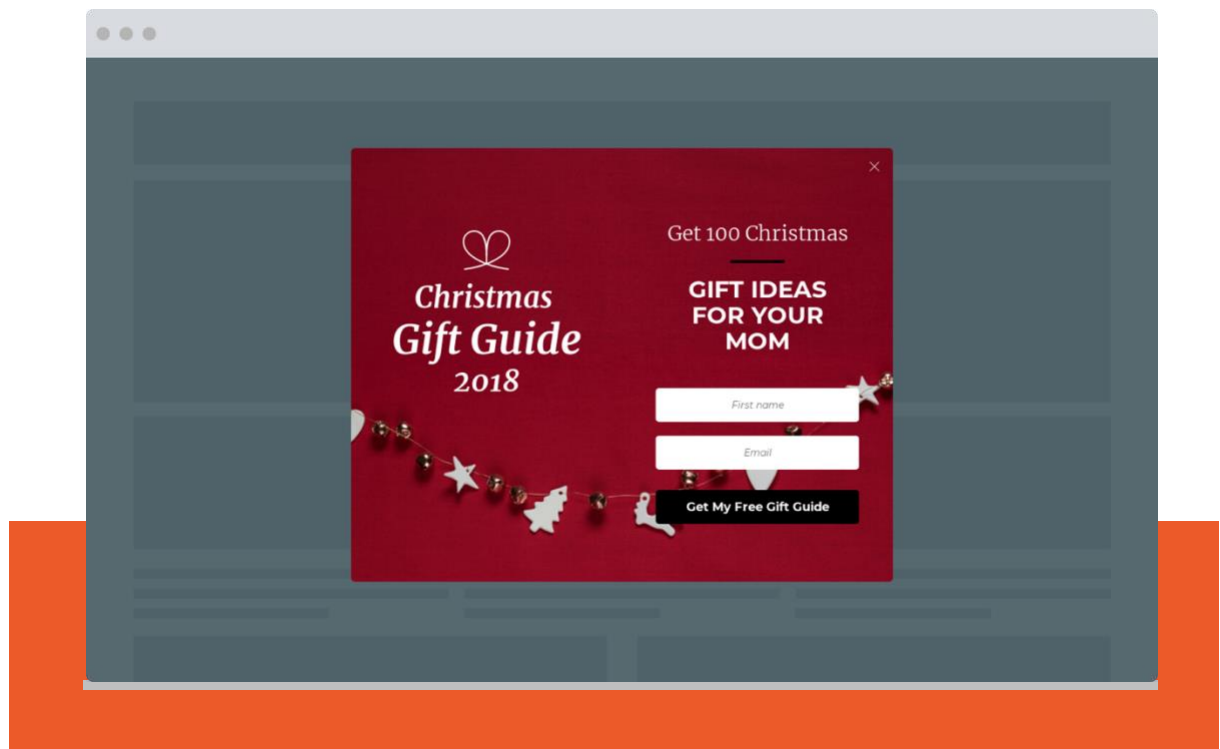
8. Reduce abandonment by highlighting trending products



9. Qualify and guide visitors to the right products



10. Inspire customers with buying guides



3. Buyer Stage:

Solution Aware Customers

Solution aware customers have an idea about which product category would solve their problems. For example, they may have decided to follow a ketogenic diet to lose weight. But they don't know exactly which of the many different products would be the best for them.

Here are some examples of solution aware customers:

- They click on our “Most popular dietary supplements for your ketogenic diet” article on Facebook
- They search for the keywords “Which is the best ketogenic protein bar” or even for a specific category like “MCT oil” in Google
- They are browsing a specific product category in your web store

In these situations, our goal is to help customers choose the right product. We should give them support to find the perfect product within a specific category.

Here are the most popular strategies for helping navigate to the right products:

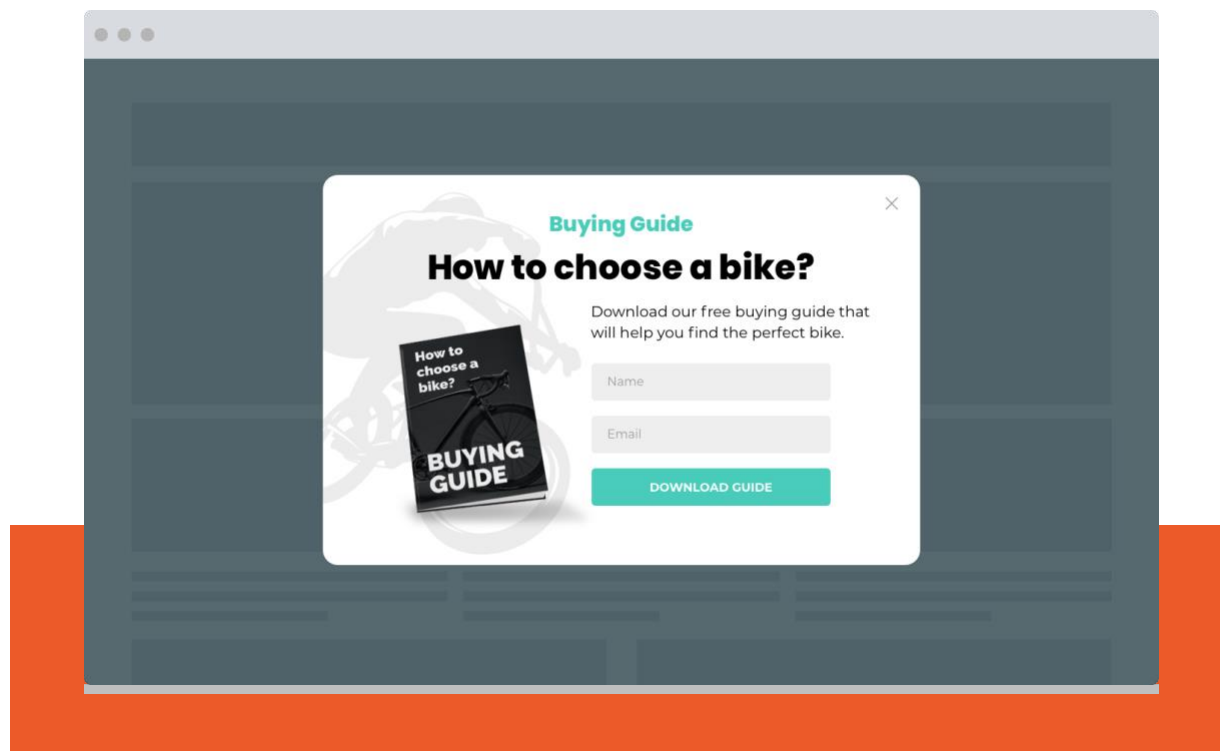
- Guides, surveys and “How to’s”
- Detailed product information
- Filtering options
- Social proof, such as promoting the most popular product within a category
- “How to choose a bike” questionnaires

Here are some message types you can use for addressing the solution-aware visitors.

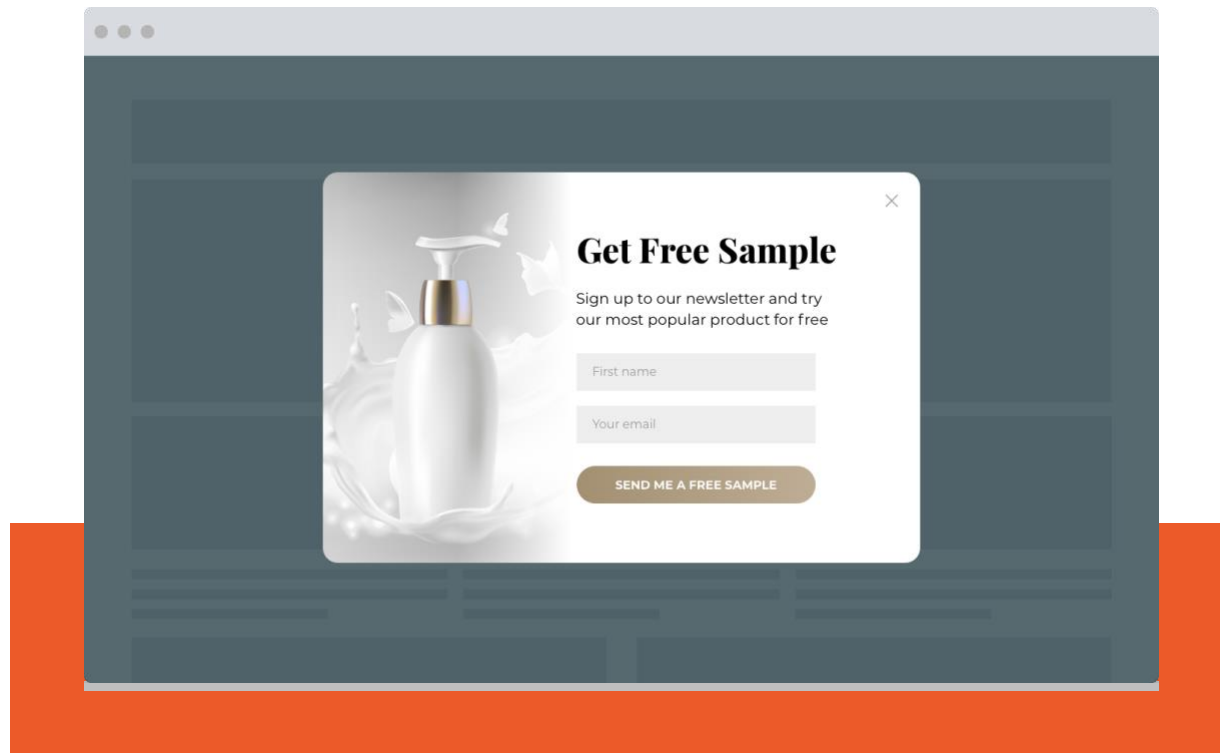
11. Show the most popular products of a category



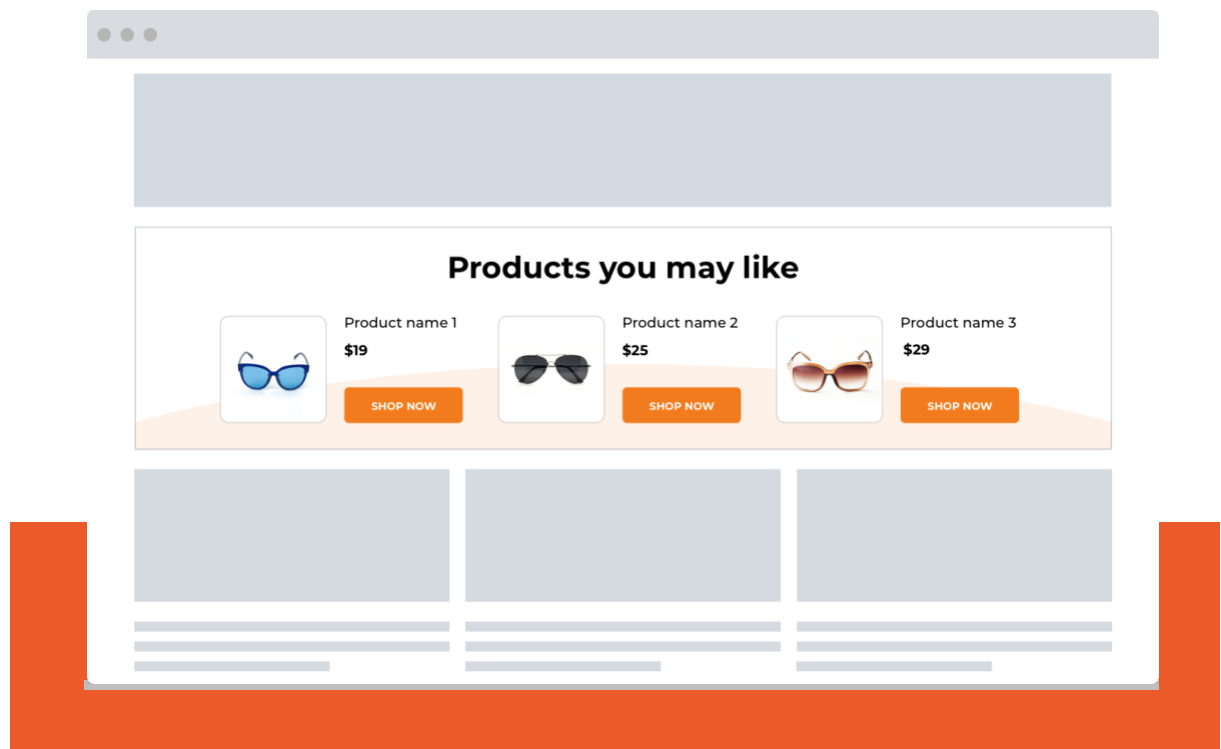
12. Help visitors choose with buying guides



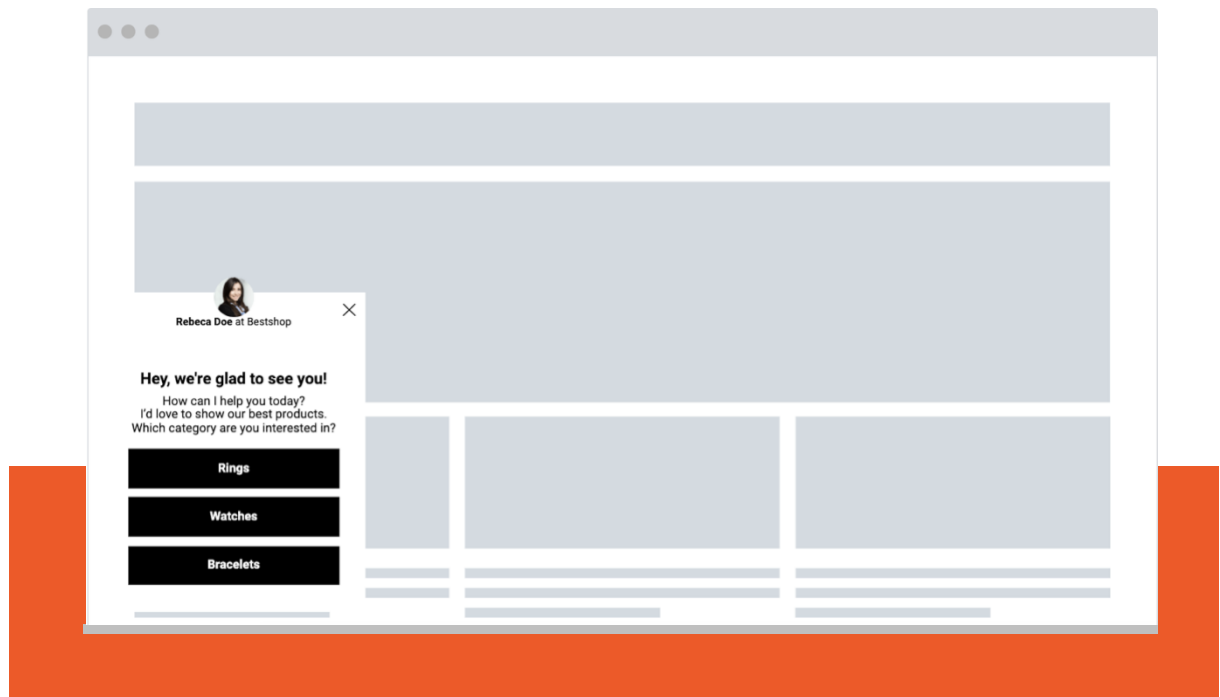
13. Offer free samples to grow your list without discounting



14. Recommend relevant products on the homepage for returning visitors



15. Create a user survey to enhance personalization



4. Buyer Stage: Product Aware Visitors

At this stage, visitors know not only what product category may offer a solution to his problems but also one or more specific products. The challenge is that he is not sure if this particular product is the best solution for him.

Here's how we can tell if a visitor is product aware:

- They search for a specific product name in Google
- They browse product pages and spend a significant amount of time there
- They use the search bar of the web store
- On a product page, they may click on a related product

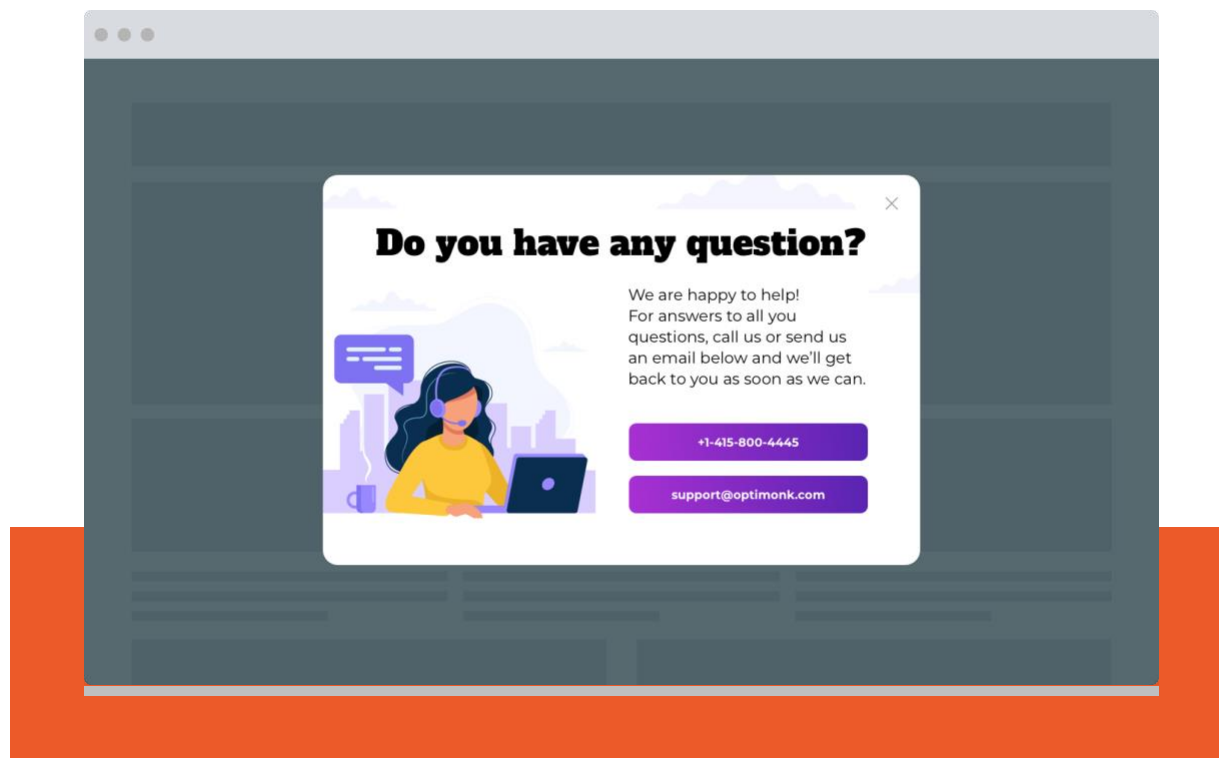
In these situations, our goal is to resolve customer uncertainties. Shoppers should clearly see that the product is right for them. And if it's not, we should help them find a product that suits their needs better.

Here are the best strategies to help customers find the right product fit:

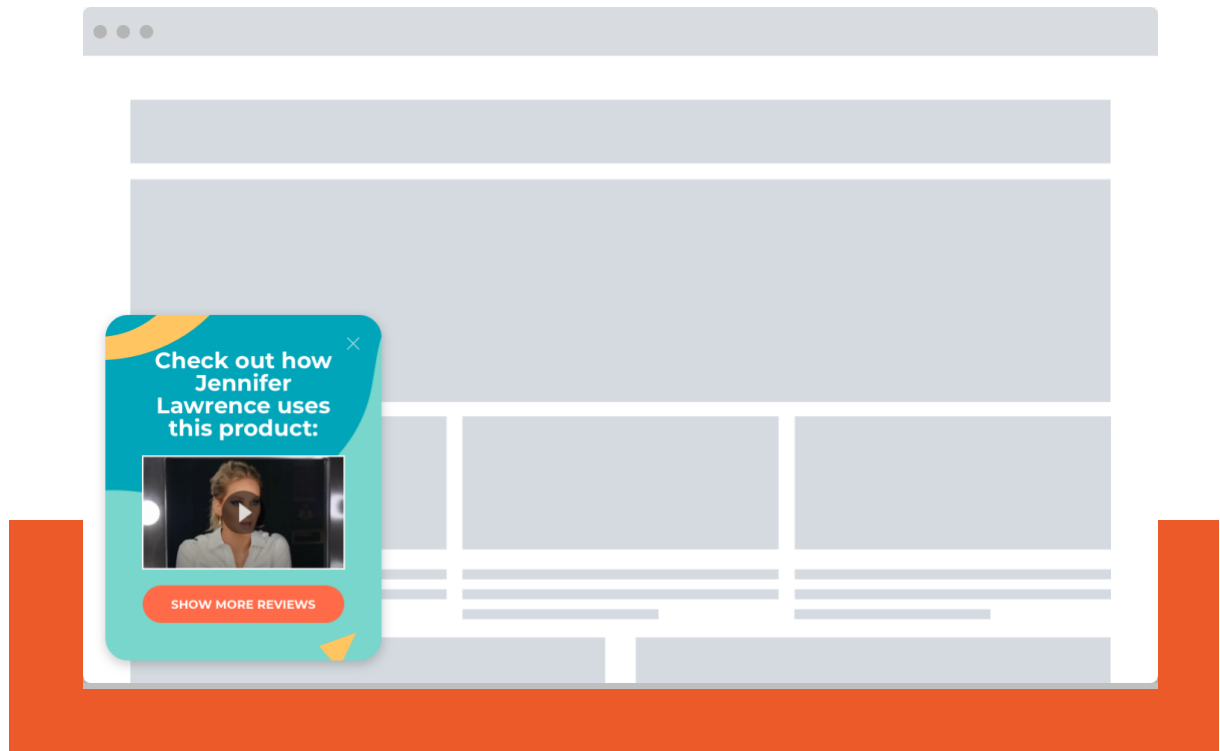
- Resolving uncertainties
- Promoting customer relationship
- Showing “social proof”
- Recommending similar or related products
- Providing the opportunity to continue the last unfinished purchase

Here are some examples.

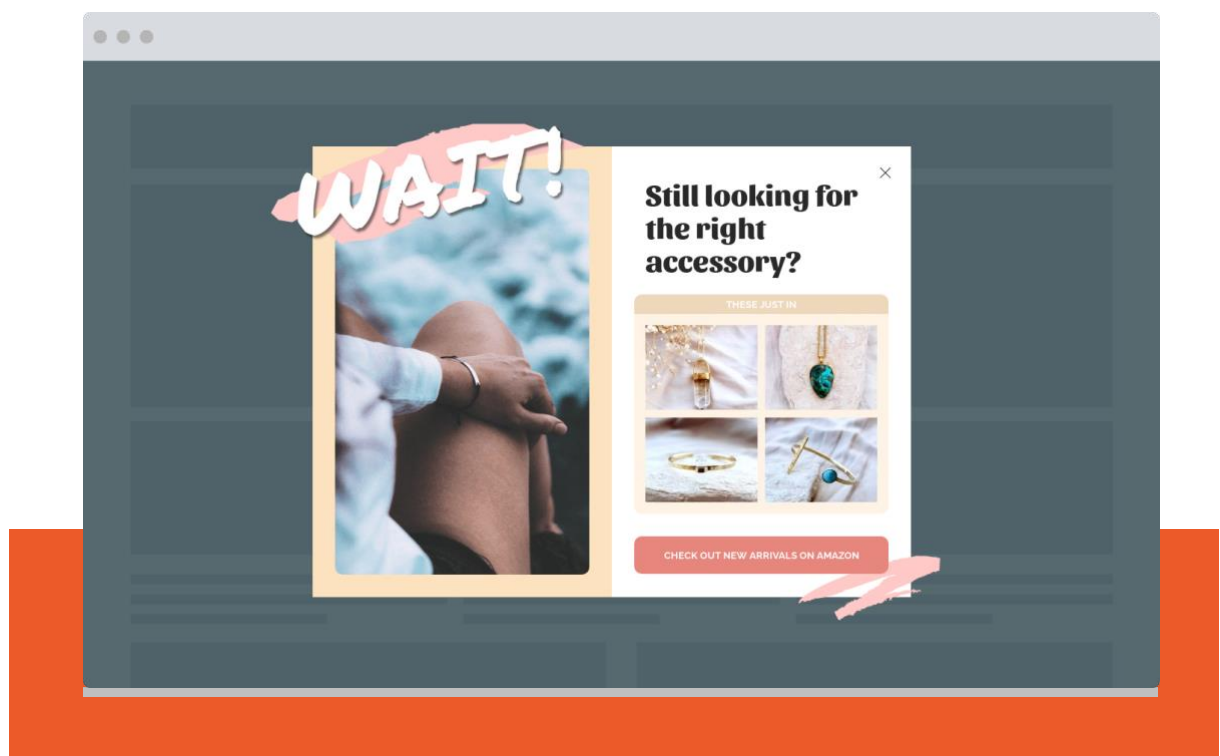
16. Promote customer support to help potential buyers



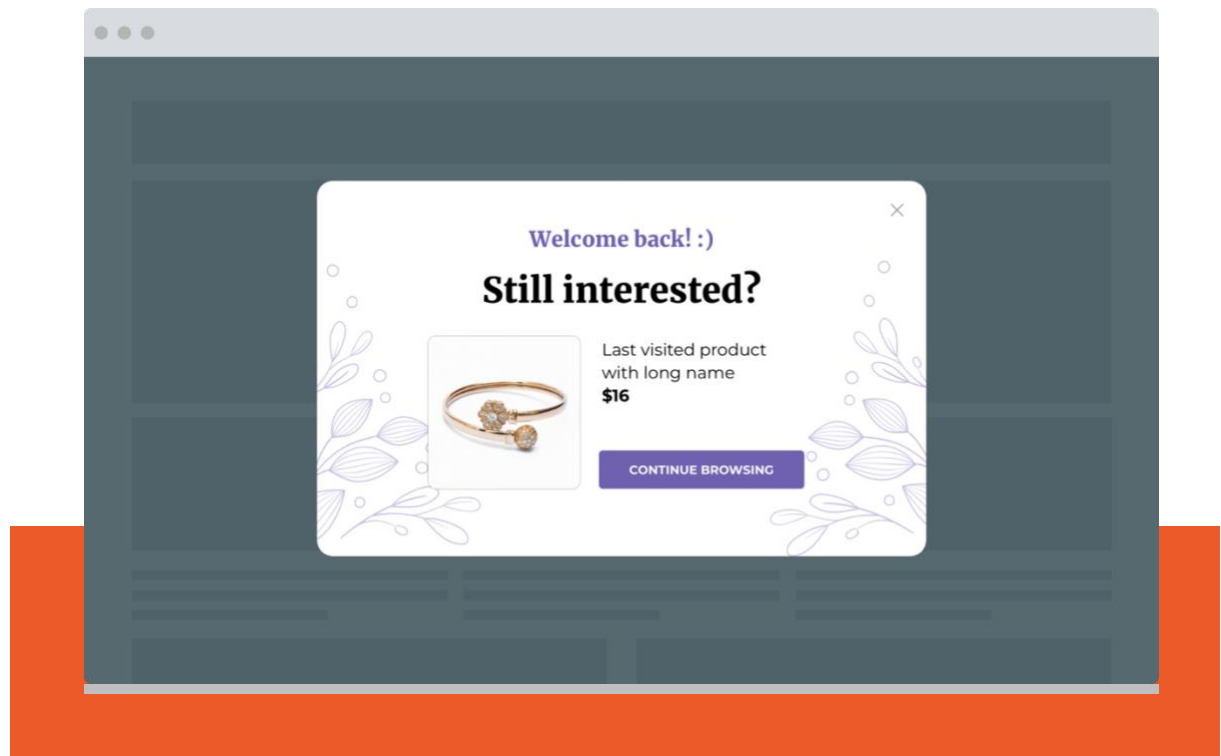
17. Show user videos/testimonials to build trust



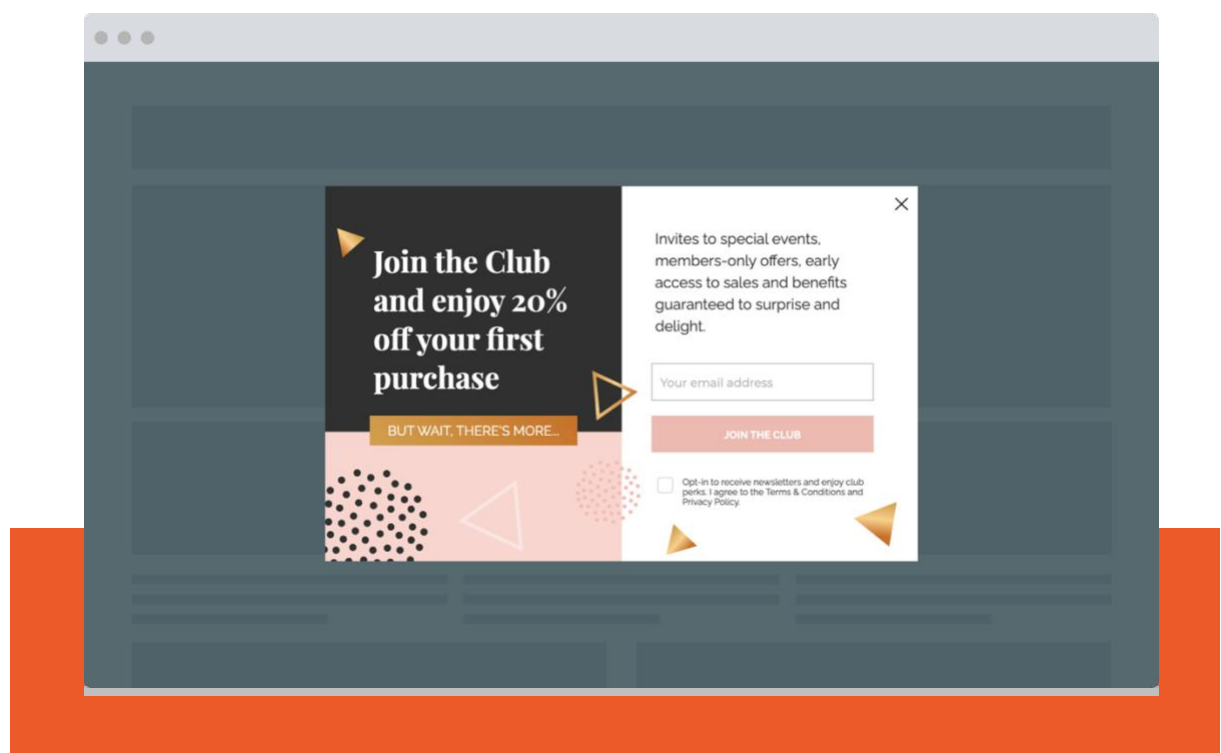
18. Recommend relevant products in exit-intent popups



19. Remind returning customers where they left off



20. Offer discounts in exchange for a newsletter subscription



5. Buyer Stage: Fully Aware Customers

In this final stage, the visitor has found the product he was looking for. He knows for sure it solves his problem. He's simply waiting for a good offer to make a purchase.

If the problem isn't big enough and the solution isn't urgent for the buyer, a little help may be needed to get him over the uncertainty. This is called nudge marketing. Nudge marketing helps customers make more confident decisions.

Here's how you know that a visitor is in the fully aware stage:

- They have products in their cart
- As returning customers, they continue the browsing with the most recent product they've seen
- They click on a product remarketing ad on Facebook
- They return to the same product again and again

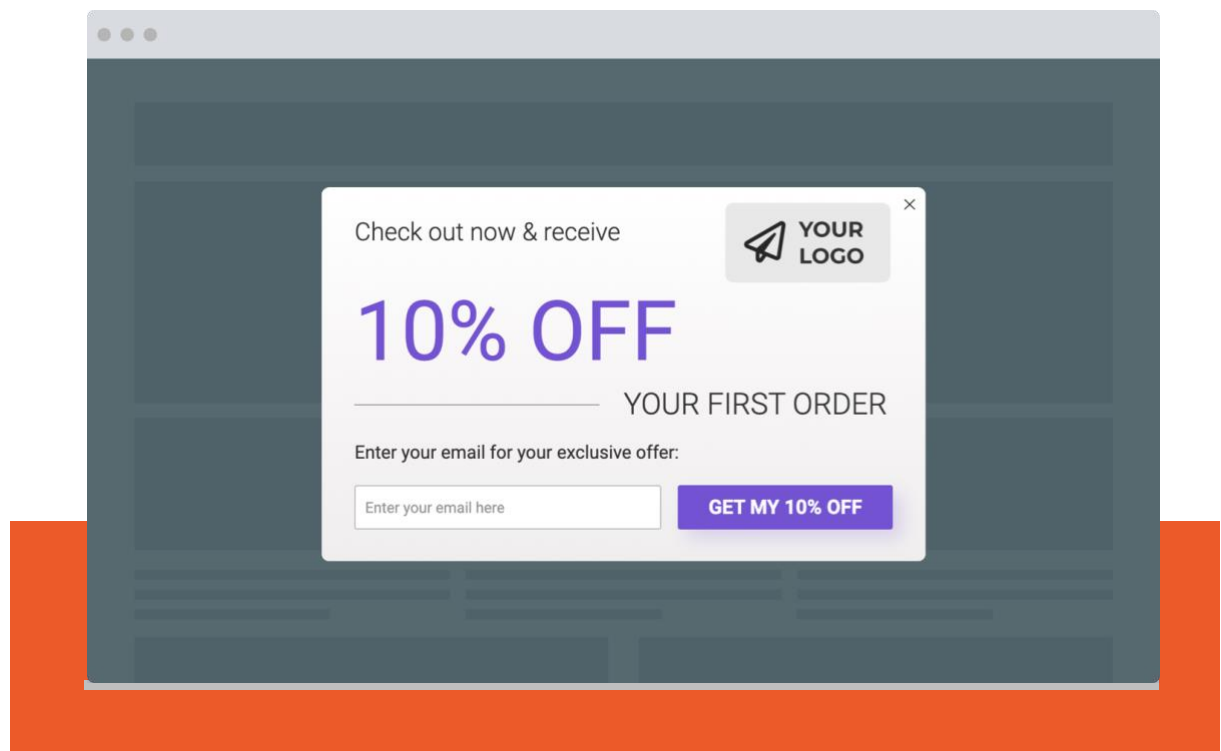
The goal is to reduce uncertainty and motivate the visitor to complete their purchase and potentially buy additional items.

Here are some key strategies to engage visitors at the fully aware stage.

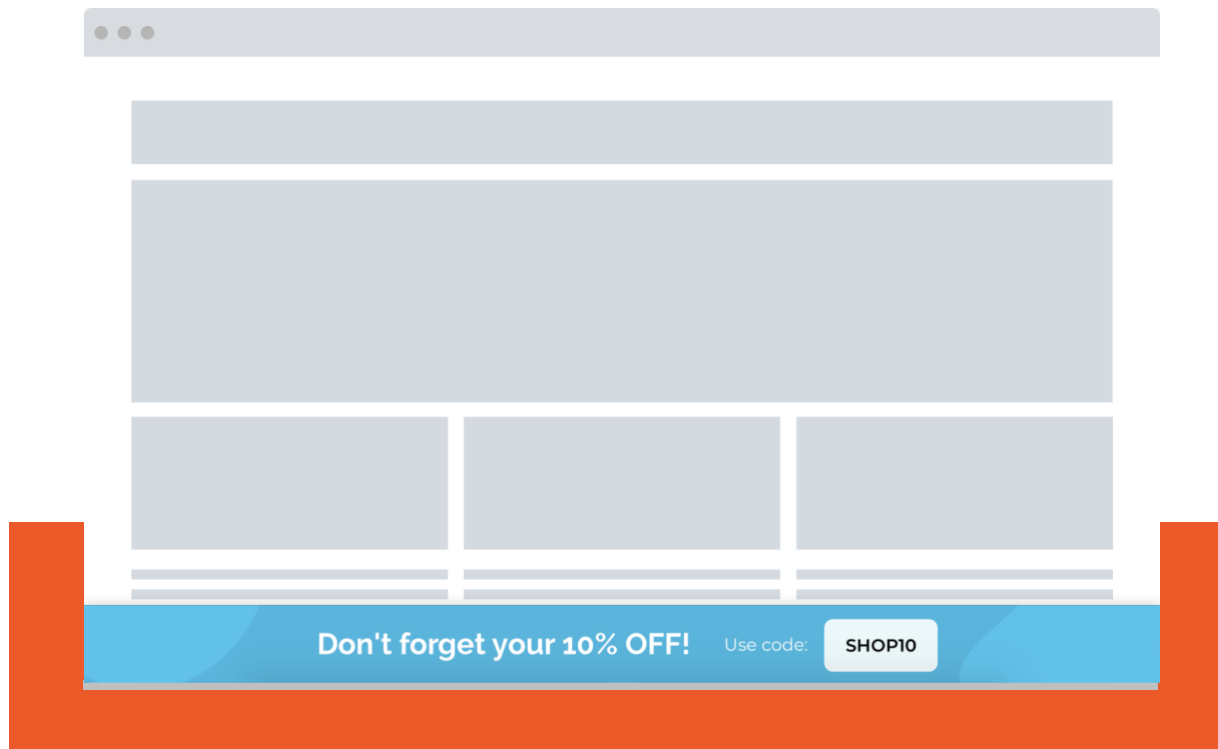
- Providing one-time discounts
- Offering free products as a gift
- Sending reminders about the abandoned cart
- Communicating the limit of free shipping
- Increasing the sense of urgency

Here are some examples of fully aware stage messages.

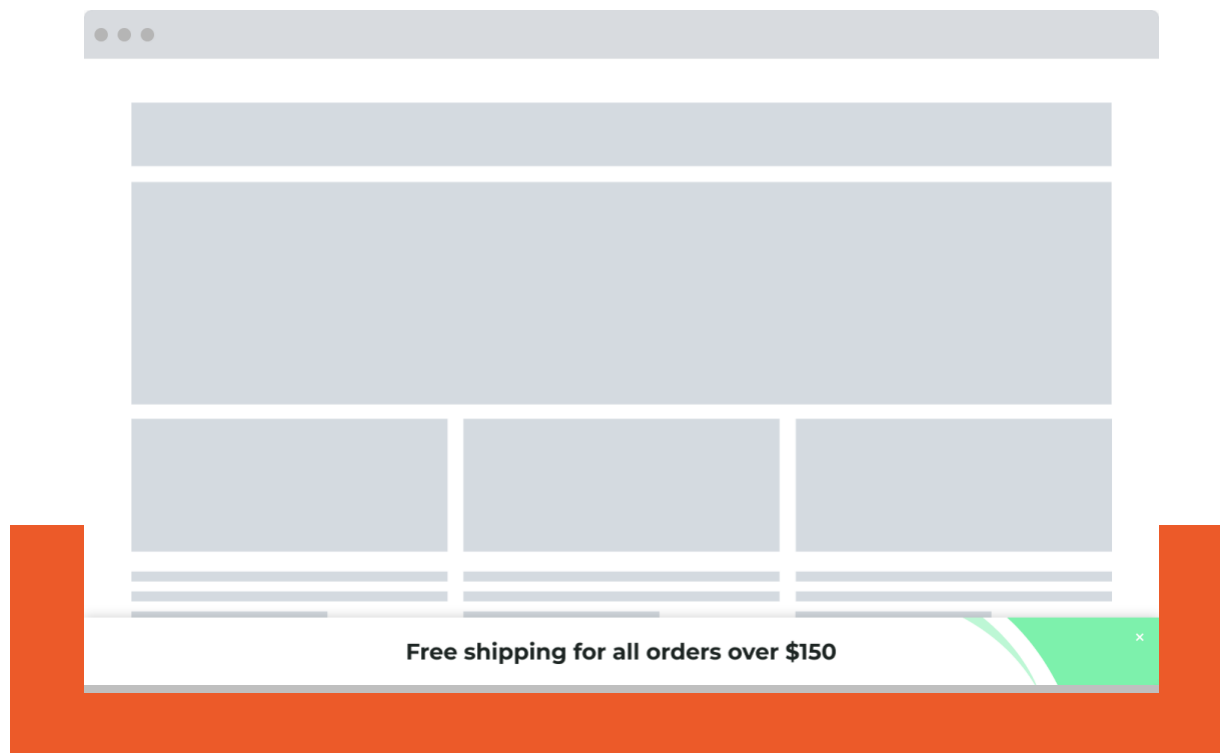
21. Promote special offers upon exit-intent



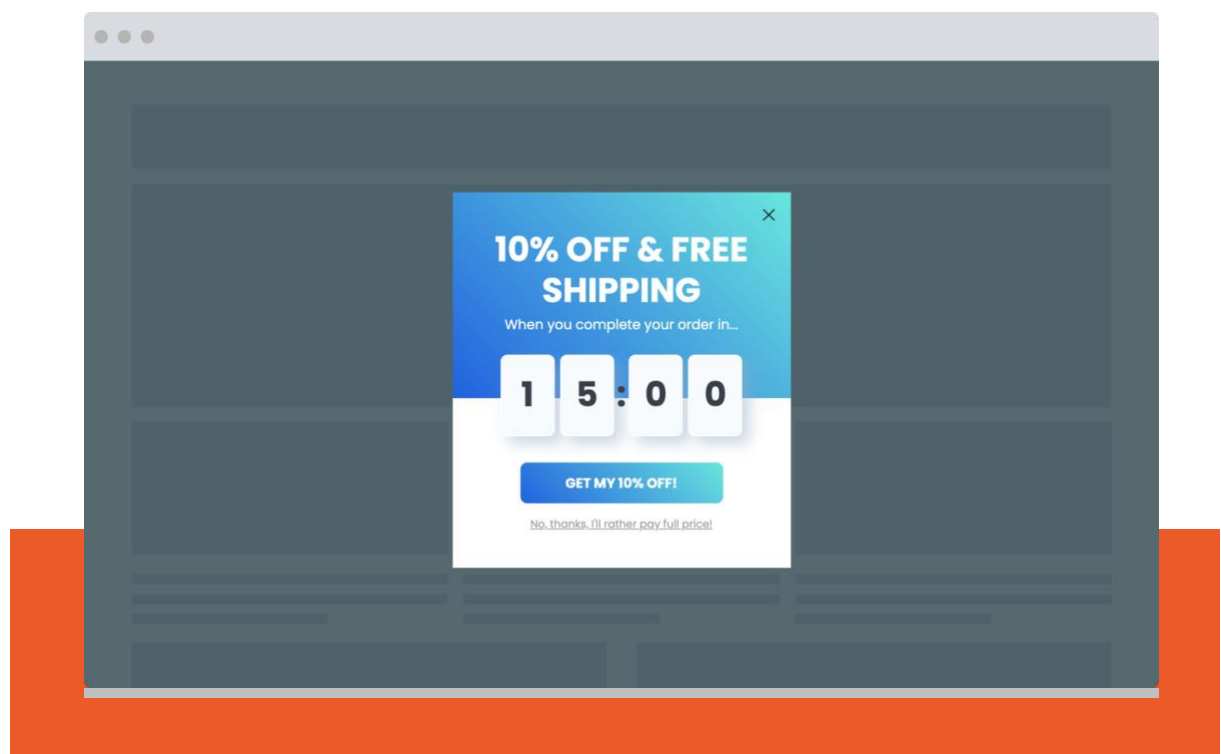
22. Coupon reminders to increase redemption



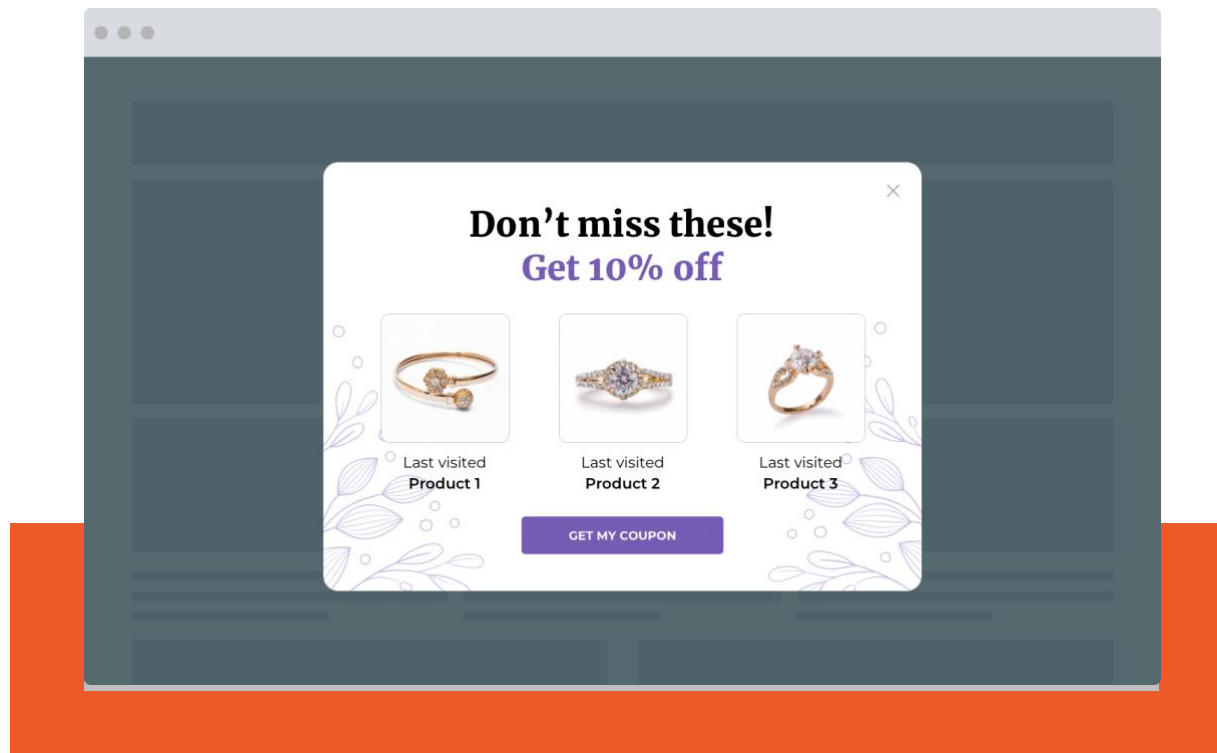
23. Special offers to increase cart size and average order value



24. Prevent cart abandonment by offering time-limited deals



25. Personalize exit-offers with previously viewed products



6. Buyer Stage: Post Purchase

Our job doesn't end after a purchase is complete. The post-purchase stage is the perfect time to start nurturing long-term customer relationships.

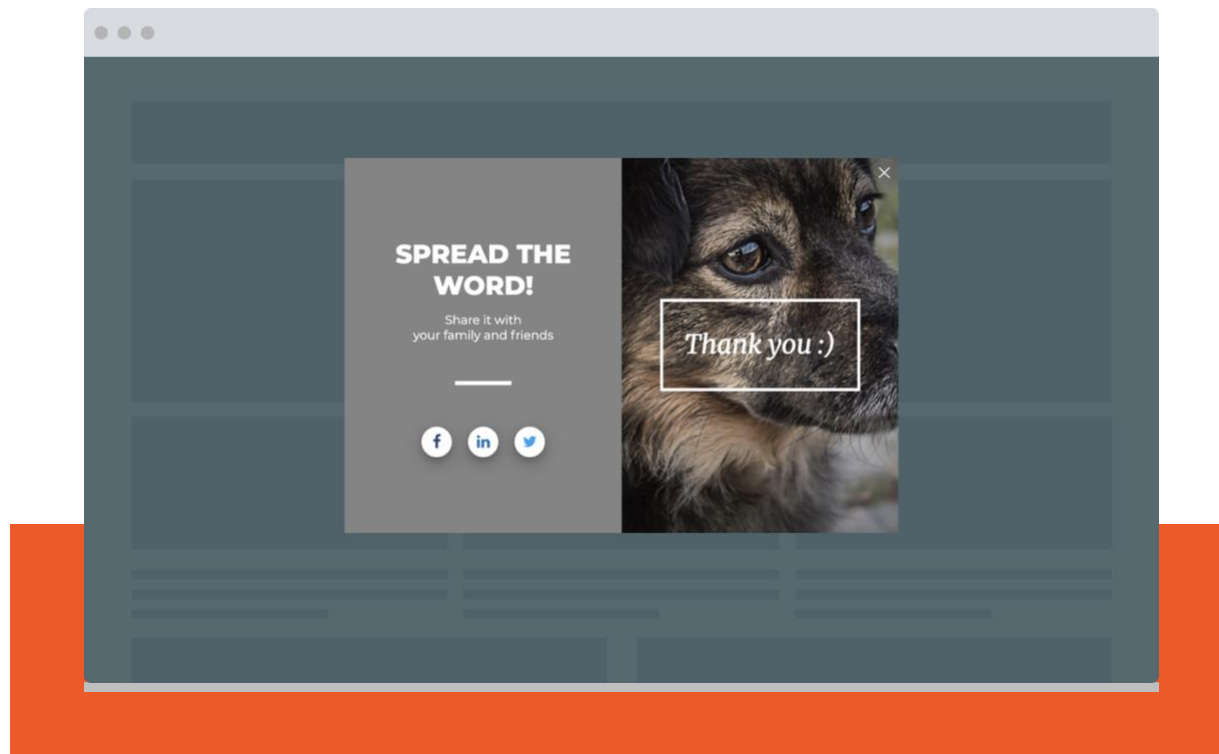
At the time of a successful purchase, the customers are in a positive emotional state of mind and open to communication. Marketers should use this openness to their advantage.

Here are a couple of examples of what strategies are worth following after the purchase:

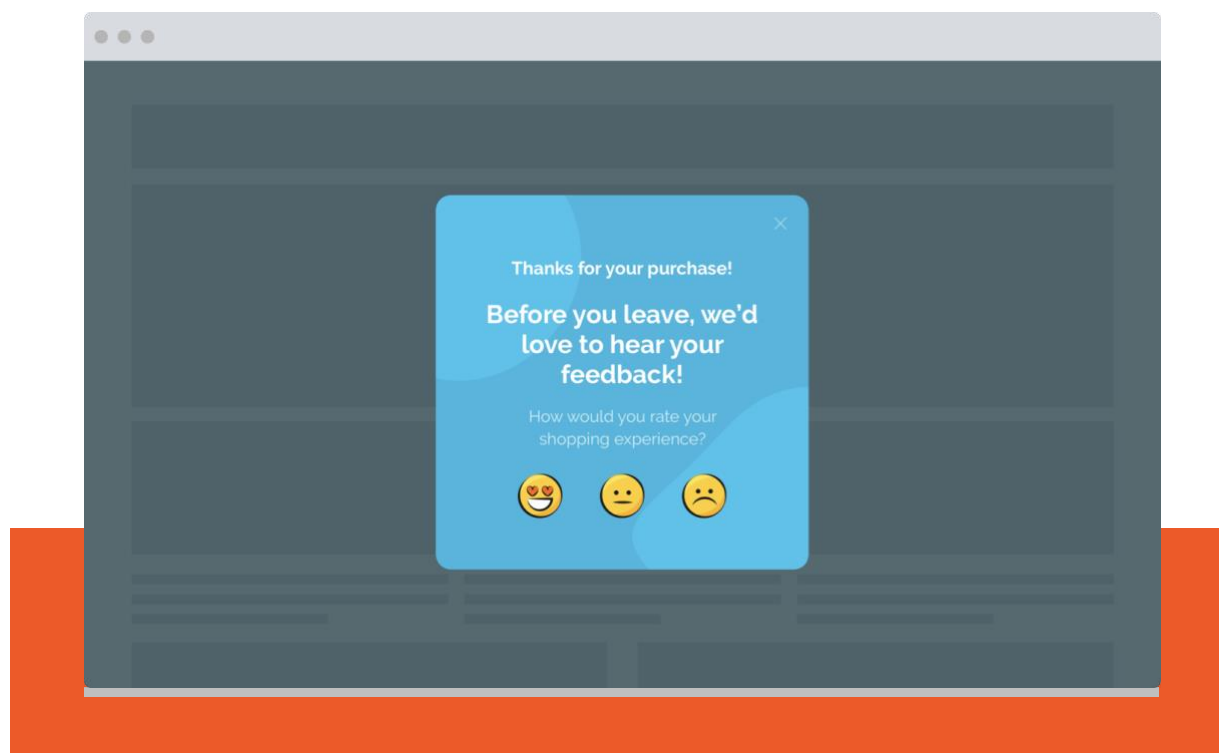
- Confirming to customers they made a good choice
- Asking for feedback about satisfaction and the buying process.
- Preparing the next order.
- Asking customers to share the experience with friends

Now let's take a look at some examples.

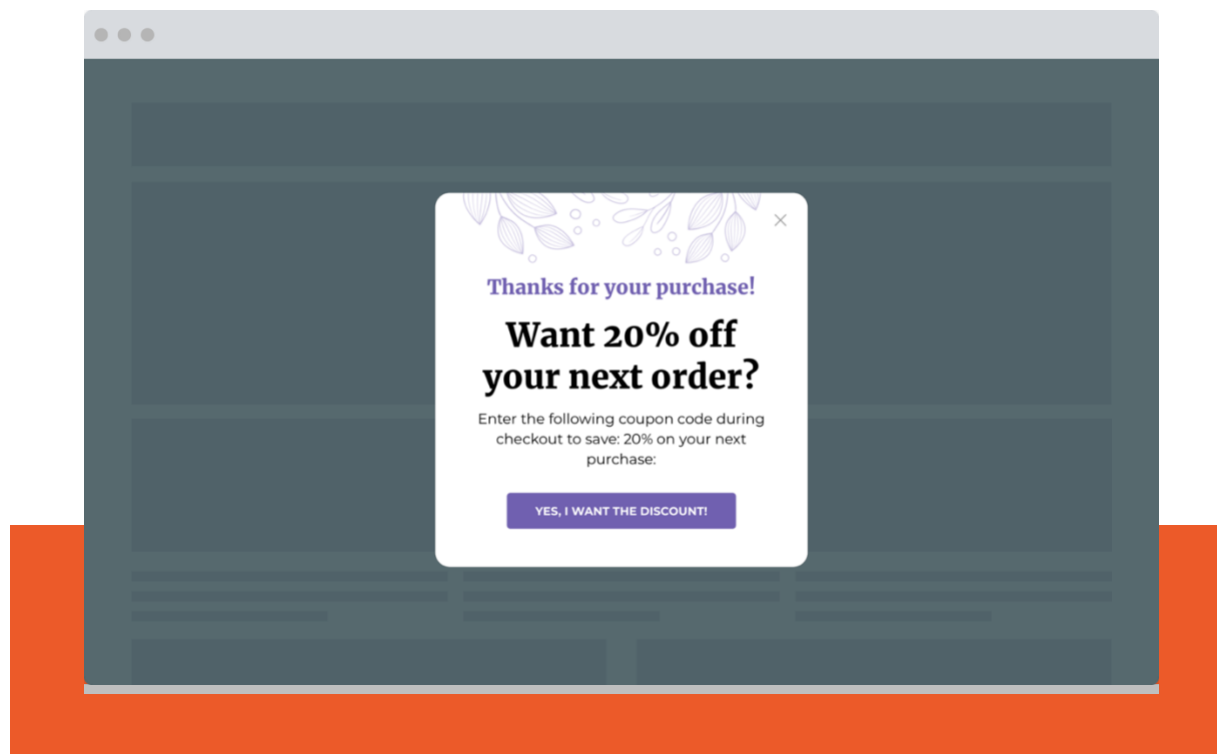
26. Social media follow in exchange for discount code



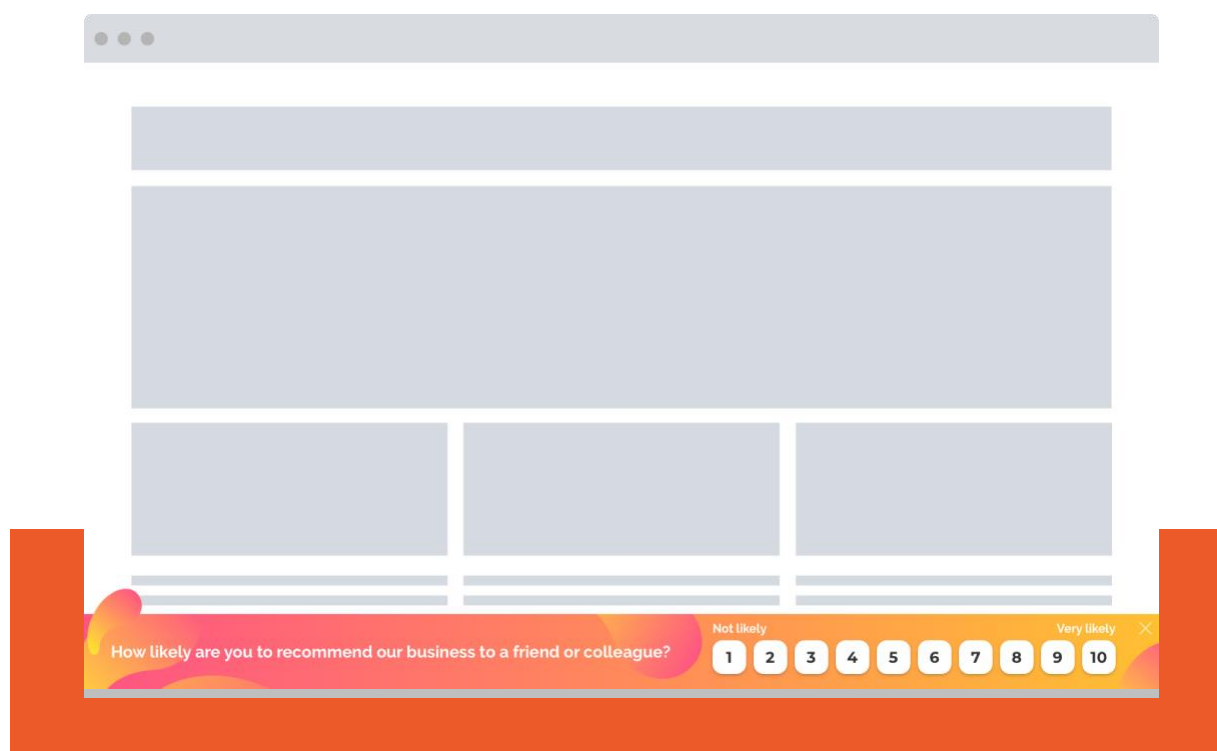
27. Measure customer satisfaction and get actionable feedback



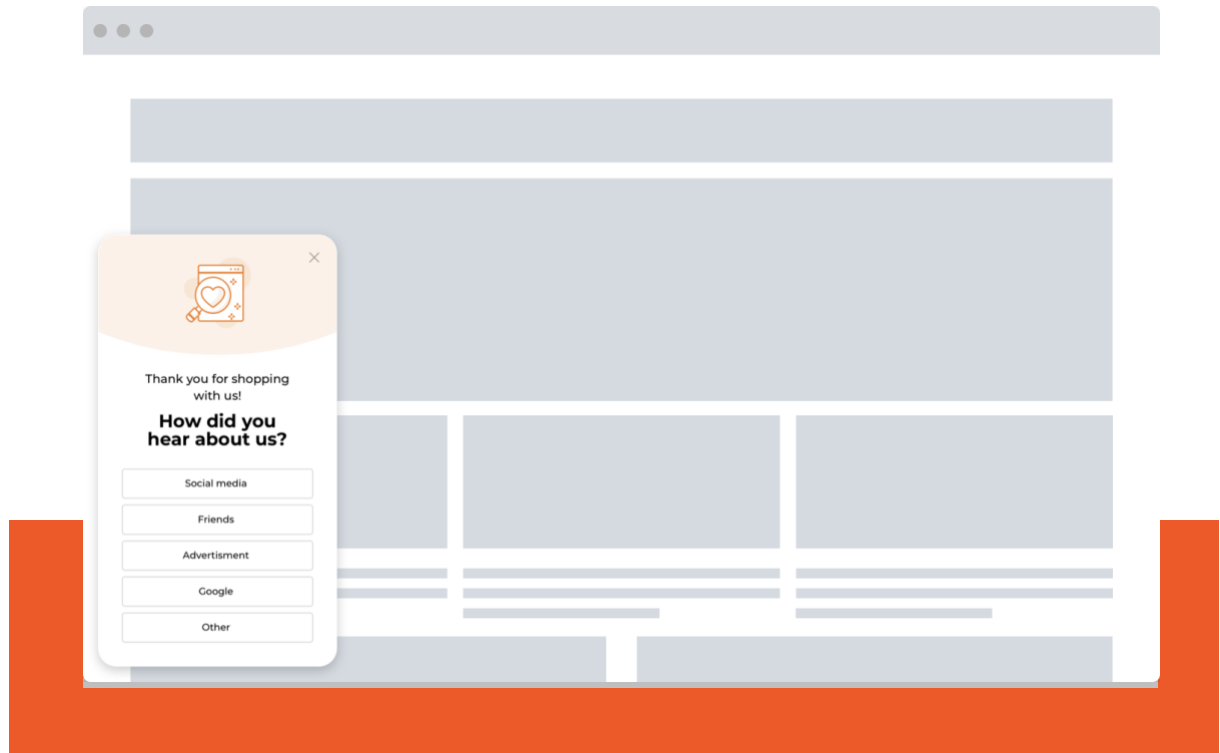
28. Post-purchase discount in exchange for feedback



29. Coupon offers for subsequent orders



30. Target first-time purchasers with a survey to better understand what attracted them to the brand



Conclusion

After reading this guide, you're probably aware of new, huge unexploited revenue opportunities in your web store. You now have the choice to either stick with the same, stale generalized popups and messages or take the leap into Customer Value Optimization. Our goal at **OptiMonk** is to help you embark along this exciting, new customer-centric path.

Customer Value Optimization isn't just a temporary trend or fad in the world of marketing technology. Online shopper personalization via CVO is a reliable method based on both science and basic human psychology. Shoppers prefer to purchase from brands that help them solve problems. Online stores that are just trying to make a quick buck with CRO will suffer in tomorrow's fierce e-commerce environment.

Customer Value Optimization isn't simply a technology or tool that you implement overnight. It's a long-term approach, philosophy and mindset. And while there's no "perfect" online customer experience, CVO helps e-commerce stores improve and optimize in a systematic fashion over time.

However, you shouldn't be overwhelmed. Start with small steps and basic implementations to get some quick wins under your belt. Once your success begins to snowball, you'll start recognizing the value of CVO and want to invest even more time, energy and resources into optimizing your customer experience.

The path to a completely optimized customer journey isn't easy. But it's definitely worth it. Implementing CVO will result in higher revenue, more profits and enhanced customer satisfaction. As an e-commerce store owner, your job will even become more fun and enjoyable as you create more value and be of assistance to your customers.

Good luck!

Csaba Zajdo



Create Delightful Shopping Experience & Grow Your Revenue

Get a powerful Customer Value Optimization tool to grow your list, increase sales and connect with visitors

Get OptiMonk Free

www.optimonk.com



Turn Your Website Visitors Into Customers

- Promote special offers
- Fight cart abandonment
- Recommend products
- Redirect visitors



Convert „Early-Stage“ Visitors Into Leads

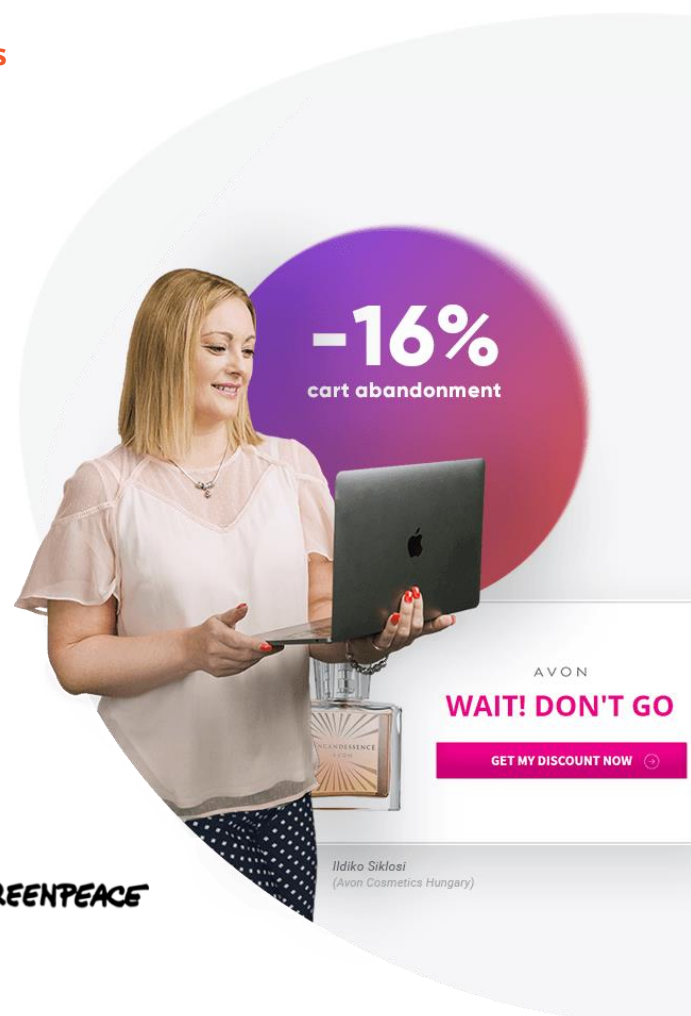
- Collect email addresses
- Build Messenger list
- Collect phone numbers
- Gamify your messages



Connect with Visitors

- Get feedback
- Make announcements
- Increase form submissions
- Increase social engagement

40,000+ websites trust OptiMonk to implement Customer Value Optimization!



AVON



GREENPEACE

Ildiko Siklosi
(Avon Cosmetics Hungary)