UX Playbook for Lead Gen

Collection of best practices to win over potential customers
Lead Gen playbook at a glance

How to win potential customers over

We all know first impressions matter. Users will hit the back button if a site takes too long to load or if the content doesn’t appear immediately relevant and valuable. Lead gen sites in particular have to work harder to earn trust immediately and have clear value propositions as they typically have a simple landing page immediately asking the user for personal information.

User expectations have risen so much so that users expect to be able to find answers within one search or one tap, without having to wait for someone to get back to them later. The key to successful lead gen today is to find the balance, providing just enough information to convince users of the value prop so they go they choose to invest time filling out your form and giving you their personal information.

And of course, when users are ready to request more info, make the forms so seamless giving them no reason to drop off.
Lead Gen playbook at a glance

1. Home/Landing Page
- Clear CTA above the fold
- Have descriptive CTAs
- If calls are important, include click-to-call at the top of every page
- Clear benefit-oriented value prop above the fold
- Don’t use full page interstitials
- Remove automatic carousels
- Use legible font sizes
- Use social proof
- Provide answers to questions users might have before they’d feel comfortable filling out a form
- Add urgency

2. Form Optimization
- Mark required fields with an asterisk
- Use inline validation
- Use autofill
- Reduce number of fields (remove optional fields, use full name instead of first/last, hide company and address line 2 by default, hide billing by default)
- Use correct keypads
- Don’t use dropdowns for inputs with < 4 options, instead opt for buttons
- Use steppers, sliders, or open field input for numerical entry rather than large dropdowns
- Use pagination or a progress bar if more than 2 steps in conversion flow
All recommendations should be A/B tested!
What can we learn from “Best-In-Class”
Homepage best-in-class: Call-to-actions

Problem to solve:
Does my site provide crystal clear to actions?

- Clear CTA indicators
- CTA tap targets easy to access
- Clear Value proposition
- Top categories on homepage
- Legible font sizes
- No revolving carousels
- No full page interstitials
Keep Call-to-actions clear and pronounced

degrees.Strayer.edu

cargurus.com

freshly.com

"Strayer's Graduation Fund is kind of like a magic piggy bank. For every three classes I pass, I get to deposit one in the bank to redeem in my last year." — Eboni Weekes

Since 1892, we have helped working adults earn the degrees employers seek, and offered the most flexible way to earn them. Our master's, bachelor's and associate programs include Business Administration, Management, Information Technology and more.
Test making “Get Started” & “Learn More” Call to Actions more specific

- “Get Started” links are no better than login walls [...] Don’t ask for too much too soon, or you risk losing people’s trust.”¹

- “Like its relative Learn More, the link text Get Started is too generic to stand on its own and can be interpreted in many ways. If you want to provide an entry point into a process, whether it’s a style quiz or sales funnel, avoid a generic call-to-action and increase the information scent by stating precisely what users should expect.”¹

- Benefits of making CTAs more descriptive
  - Links will be more accessible
  - Links will be more enticing to users and potentially more persuasive.
  - Users will feel more confident as they click from page to page.
  - More keywords on the page will help search-engine optimization.
  - Meaningful links will stand alone and help users who are scanning the page.

Source:
Don’t rush commitment in call to actions and add benefits

- Most people are commitment-averse
- Don’t ask for a commitment when you can delay it
- The best example would be ‘buy now’ vs ‘add to cart’
- When ‘buy now’ seems awfully final, ‘add to cart’ seems kind of risk-free and leaves the door open for changing the mind

Changing the copy of the CTA increased clickthroughs by 26%

Source: https://marketingexperiments.com/digital-advertising/site-banners-tested
BettingExpert.com tweaked the form copy (headline & button text), led to an increase of 33% in membership sign-ups.

Original: Sign Up

Test: Sign Up & Get the Best Daily Tips

Keep call-to-actions clear and pronounced

esade.edu
emagister.com
universidadviu.es

Become a driver of true and lasting change

#BeaCREACTIVIST

ESADE Business School has a long tradition of training future business leaders. But the past is far from where our focus lies.

Our new and improved MBA understands that the business person of the future is a game-changer; someone capable of creating a new world going beyond the status quo. The ESADE MBA is for the future leaders that are ready to think differently and break new ground.
Open colleges keeps CTAs within reach throughout the experience

Open colleges keeps CTAs within reach throughout the experience
Problem to solve: Does my site make our value proposition clear to users immediately?

- Clear CTA: Search
- Clear Value proposition
- Consolidated menu with hamburger and cart
- Social proof
- Top categories on homepage
- Legible font sizes
- No revolving carousels
- No full page interstitials
Clear value propositions

**miami.edu**

*Additional benefits of University of Miami Online Degrees include:*

**Top 50 University**
U.S. World & News Report recently ranked the University of Miami as a top-50 university in the U.S.

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- **150K** community members
- **1,569** partners

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**Sign Up for Demo →**
Clear value propositions

en.unir.net

and understand how companies operate in different international arenas.

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- AACSB
- EFMD
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Live Online Lectures
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learndigital.withgoogle.com

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Grow your career or business at your own pace, with flexible and personalised training courses designed to build your confidence and help you thrive.

- Discover tools to make your business succeed
- Improve your interview skills
- Prepare for the career you want

GET STARTED

Simple steps for your growth

Choose a skill
Whether you’re a student or a business, at the start or in the middle of your journey, here you can choose the lessons that are right for you.
Use social proof to gain user trust

lemonade.com

wordpress.org

tableau.com

23andme.com
“Social proof is a psychological phenomenon where people reference the behavior of others to guide their own behavior.”

“Social-psychology studies have repeatedly indicated our conscious and unconscious reliance on each other for cues in almost all decisions that we make.”

“Increasing credibility: Users do consider how others perceive content, services, and products that they find online. Adding an indication that other people, or even better, familiar people, like the content or product can remove decision-making uncertainty.”

Source: https://www.nngroup.com/articles/social-proof-ux/
Social Proof is powerful for trust

According to a Nielsen report, 70% of consumers trust consumer opinions online. 63% of consumers say they are more likely to buy from a website that displays reviews.

Social proof can be displayed with:

- Testimonials
- Number of people using your services/products
- User ratings

A trust seal verifies that a website is legitimate. Data is collected by the third-party trust seal company that confirms that the business is authentic.

Econsultancy/Toluna survey: participants were asked which factors help them to decide whether or not to trust a website.

Source: https://www.crazyegg.com/blog/ecommerce-trust-signals/
Homepage best-in-class: Social proof

Opiniones

5.0
EXCELENTE
Valoración del curso
Lo recomiendan

Opiniones sobre este curso

Aina Fo
5.0 ★★★★★
19/08/2017
Lo mejor: Hace poco que he empezado el master MBA en ADE y estoy muy satisfecha con los materiales, me llegaron pronto y pude empezar a estudiar en verano. Gracias por la atención recibida y estoy convencida de mi buena elección.
A mejorar: Nada que decir, vamos a ver como evoluciona el temario.
¿Recomendarías este curso?: Sí

Logros de este Centro

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La valoración media es superior a 3,7
Más de 50 opiniones en los últimos 12 meses

Este centro lleva 1 años en Emagister.

¿Qué aprendes en este curso?

- Administración
- Contabilidad
Problem to solve: Does my site provide answers to questions users might have before they’d feel comfortable filling out a form

- Address top questions users have
- Provide enough information for user to feel comfortable moving forward
- Make it easy to for user to request further information
- Put user in the driver seat - ask what dates/times they want to be contacted if you’re contacting them
Provide answers to questions users have

betterment.com

I'm an investing novice

I want to see what you can do for me

Get Started

I'm an investing novice

I want to see what you can do for me

Get Started

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Options to fit people and organizations with different data needs

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Please select a deployment option

On-premises or Public cloud

Fully hosted by Tableau

business.twitter.com

Start a Campaign

Business

Basics

Solutions

Resources and guides

Ads help center

Build your brand, expand your following, and increase the visibility of your Tweets with a Twitter Ads campaign.
Offer Users something before asking for something
Give users a Demo, offer a Free Trial or give them a Preview

- “The reciprocity principle is one of the basic laws of social psychology: It says that in many social situations we pay back what we received from others.”\(^1\)

- “Free content is the digital counterpart of the free samples from the physical world and is an ingrained use of the reciprocity principle on the web.”\(^1\)

- “If at all possible give people a preview of what you’re selling. This will qualify leads”\(^2\)

- (Our studies of B2B website use show that users frequently enter made-up information when they encounter overly aggressive lead-generation forms before the website has established its credibility. Unless you want your sales force to make a lot of calls to Mickey Mouse, it’s a bad idea to ask for user information too soon.)\(^1\)

Source:
Don’t rush commitment
Consider what your users want and not what you need them to do

The main reasons Users identify when they were unsatisfied with a brand/company are:

- The company does not put my need above its own business goals
- The company does not make me feel like I have a relationship with them
- The company always tries to sell to me instead of providing value

Source: [marketingexperiments.com/conversion-marketing/importance-of-building-consumer-trust](https://marketingexperiments.com/conversion-marketing/importance-of-building-consumer-trust)
Make decisions easy (don’t let paralysis lead to drop off)

tableau.com

creditcards.chase.com

adobe.com
Homepage best-in-class: Make required decisions easy

emagister.com

Decisions are hard. Choosing VCU is easy. Here are some simple first steps.

vcu.edu

Join our mailing list

Explore our programs

gsuite.google.com

Does your company have a domain?

To set up an email and a G Suite account for your business, you will need a domain, such as example.com.
Add urgency to entice users to take action

Betterment

The smart, modern way to invest

Get started

Rover.com

On-Demand Dog Walking

A certified dog walker will be selected for you. No searching necessary.

For a limited time, get up to your first 5 walks free.

When do you need a walk?

On-demand dog walking is available in 10003! Change your zip code
Get a dog walker automatically within the next hour, or scheduled for later.
Walks are available from 8 am - 9pm.

Achieve.Strayer.edu

Save up to 25% and get a new laptop.

REQUEST INFO

Fill out this form to learn more.

First Name*

Last Name*

Email Address*
“This is one of the most impactful A/B test I’ve ever run. **The conversion rate of variation B was almost 3x that of variation A.**

Here’s what happened to our conversion rate as we gradually rolled out variation B to all users. **Our conversion rate went from ~3.5% to ~10%.**”

1. https://conversionxl.com/blog/creating-urgency/
Typing on mobile is hard
Problem to solve: How do I help users pay quickly and easily?

- Exit points limited after cart
- Reduced number of fields -- No second address line, no optional info
- Auto-fill used
- In-line validation (section turns green)
- Address info uses Google Places API to autofill 5 shipping fields
- Credit card fields use correct keypads
- Billing is shipping by default
- Value prop around ‘free shipping & returns’ at bottom
- Customer service contact capabilities at the bottom
Use Autofill to reduce work for the user

- box.com
- generalassemb.ly
- xfinity.com
Reduce the number of fields

Use full name

Use Google Places Autocomplete API (link)

Check billing as shipping by default
In-line validation

generalasemb.ly

generalasemb.ly

Contact Information

Your Name
Ayumi Rogers

Your Email
ayumirogers@gmail.com

ayumi

Please enter a valid email address

ayumirogers@gmail.com

ayumi Ro

gracehopper.com

gracehopper.com

Billing address

Country
United States of America

ZIP code

hotels.com

hotels.com

Empire Hotel

Monday, July 16, 2018 - Tuesday, July 17, 2018, 1 night

Card number

111

Expiration date

MM / YY

Your credit card number appears to be incorrect. Please check it and try again.

Security code

000

Norton Secured

In a rush? No problem. We don't need your full address as you can book securely without it.
Correct keypads

generalassemb.ly

bootcamp.cvn.columbia.edu

gracehopper.com
Ensure that the correct input type is used

<table>
<thead>
<tr>
<th>Input Type</th>
<th>HTML</th>
</tr>
</thead>
<tbody>
<tr>
<td>number</td>
<td><code>&lt;input type=&quot;number&quot; min=&quot;2&quot; max=&quot;10&quot; step=&quot;2&quot; value=&quot;6&quot;/&gt;</code></td>
</tr>
<tr>
<td>email</td>
<td><code>&lt;input type=&quot;email&quot;/&gt;</code></td>
</tr>
<tr>
<td>url</td>
<td><code>&lt;input type=&quot;url&quot;/&gt;</code></td>
</tr>
<tr>
<td>date</td>
<td><code>&lt;input type=&quot;date&quot;/&gt;</code></td>
</tr>
<tr>
<td>range</td>
<td><code>&lt;input type=&quot;range&quot; min=&quot;2&quot; max=&quot;10&quot; step=&quot;2&quot; value=&quot;6&quot;/&gt;</code></td>
</tr>
</tbody>
</table>
Use pagination or progress bar if more than 2 steps in conversion flow

bootcamp.cvn.columbia.edu

confused.com

geico.com
Form optimization best in class: (Single Page): **Warby Parker**

**Problem to solve:** How do I help users pay quickly and easily?

- Reduced number of fields -- First and last name consolidated, no second address line
- Don’t make user input password twice
- In-line validation (green dots)
- Notification if a field is skipped
- Auto-fill used
- Address info uses Google Places API to autofill 5 shipping fields
- Credit card field doesn’t expand until clicked into
- Billing is shipping by default
- Customer service contact capabilities at the bottom
Display form fields in a single column layout

“Multiple columns interrupt the vertical momentum of moving down the form. Rather than requiring users to visually reorient themselves, keep them in the flow by sticking to a single column with a separate row for each field. (Exceptions to this rule: short and/or logically related fields such as City, State, and Zip Code can be presented on the same row.)”

Source: https://www.nngroup.com/articles/web-form-design/ & https://uxplanet.org/psychology-affecting-ux-design-d6186b840704
Don’t use drop downs if less than 3 options

Before

After
Thank You