

UX Playbook for Lead Gen

Collection of best practices to win over potential customers



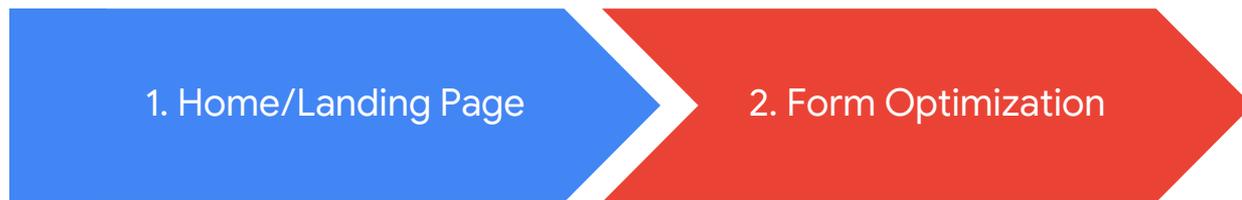
Lead Gen playbook at a glance

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

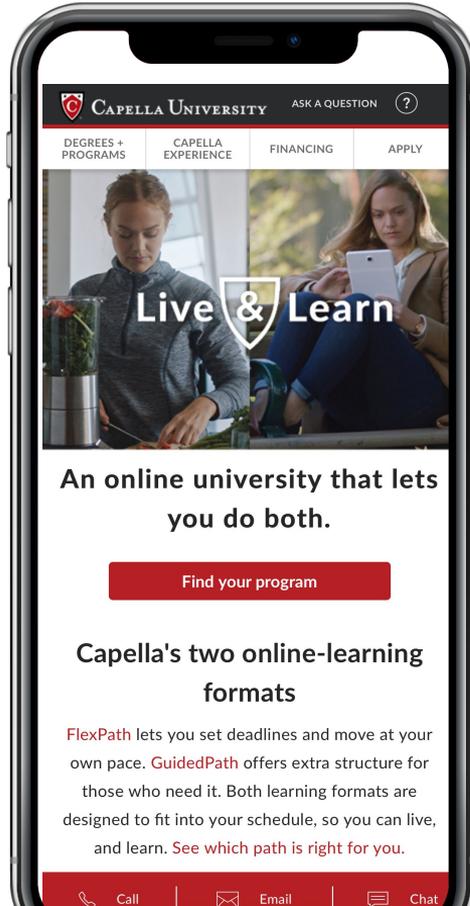
2. Form Optimization

- 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



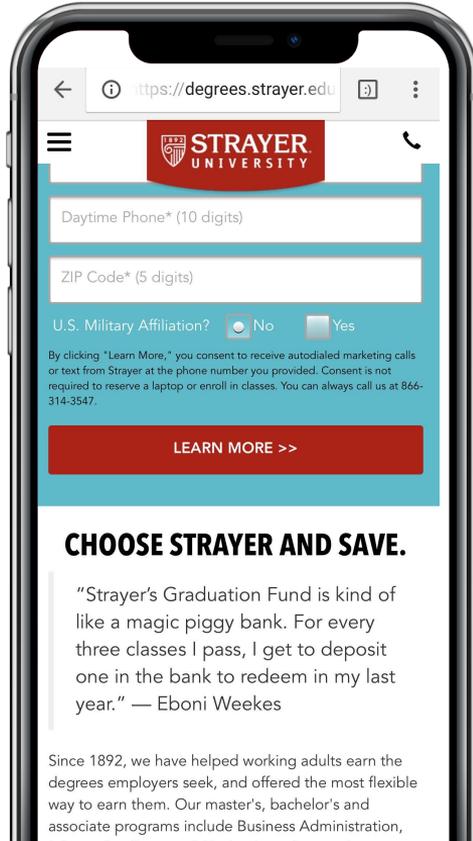
Problem to solve:

Does my site provide crystal clear to actions?

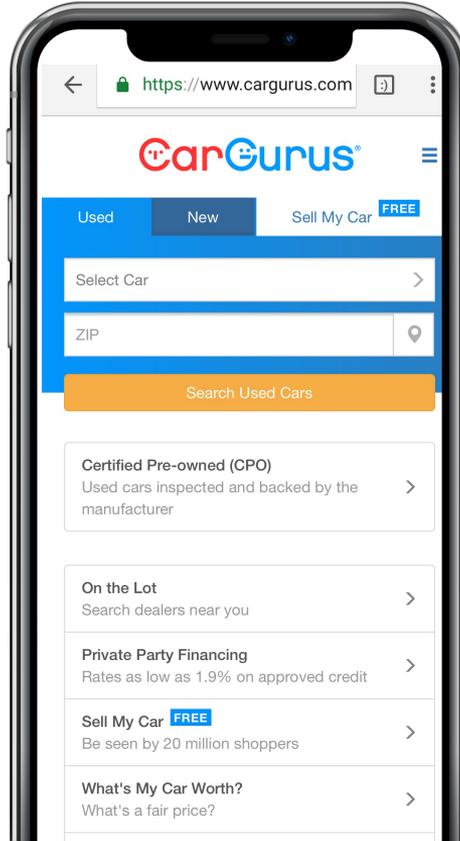
- Clear CTA indicators
- CTA tap targets easy to access
- Clear Value proposition
- Top categories on homepage
- Legible font sizes
- No revolving carousels
- No full page interstitials

Keep Call-to-actions clear and pronounced

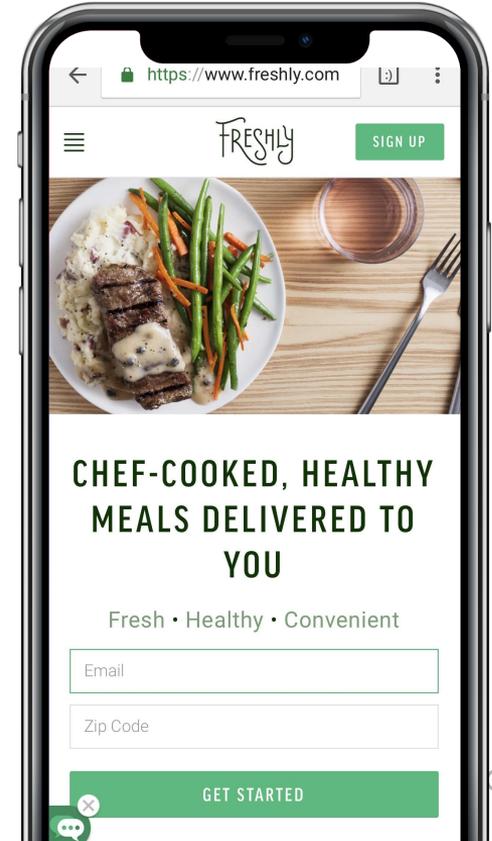
degrees.Strayer.edu



cargurus.com



freshly.com



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:

1. <https://www.nngroup.com/articles/get-started/>

2. <https://www.nngroup.com/articles/learn-more-links/>

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%

A/B Test



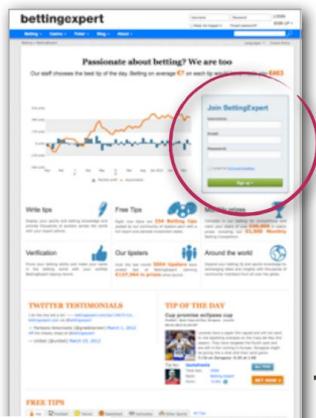
“Start Free Trial” CTA

“Get Started Now” CTA



marketingexperiments

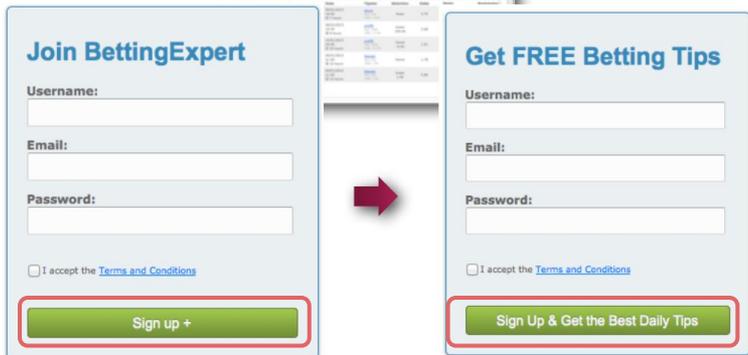
Benefit oriented call-to-actions



BettingExpert.com tweaked the **form copy** (headline & button text), led to an increase of **33% in membership sign-ups**

Control:

Treatment:



Original: Sign Up

Test: Sign Up & Get the Best Daily Tips

Keep call-to-actions clear and pronounced

esade.edu

ESADE Business School

inspiring futures

MyVision

Expand my business into new 市场

FILL IN THE FORM FOR MORE INFORMATION

Become a driver of true and lasting change

#BeaCREATIVIST

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.**

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Metodología	Online

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FILTROS

Ver sólo títulos oficiales

CIENCIAS DE LA SALUD

Máster Universitario en Bioética

Open colleges keeps CTAs within reach throughout the experience



Original



Variation

Open colleges keeps CTAs within reach throughout the experience

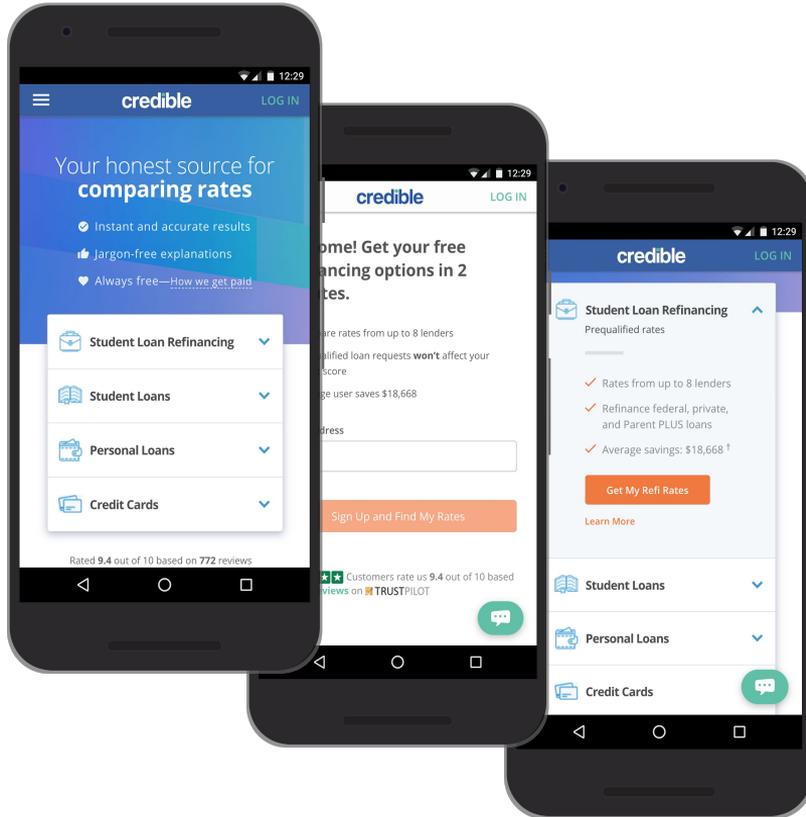


Original



Variation

Homepage best-in-class: Value propositions



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

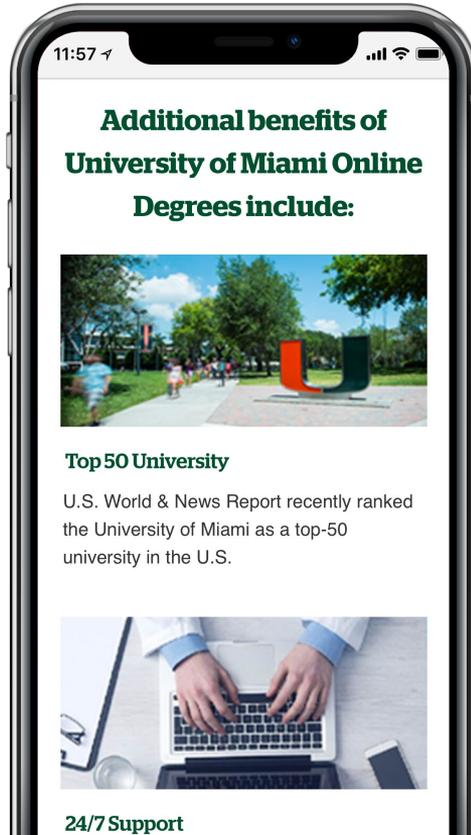
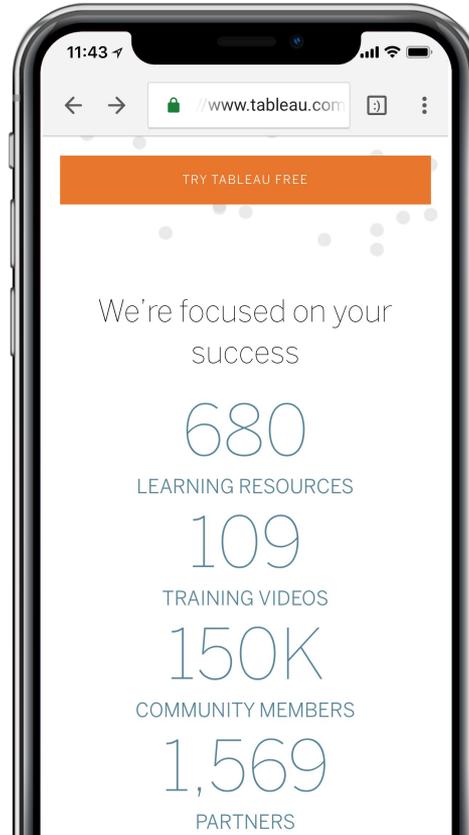
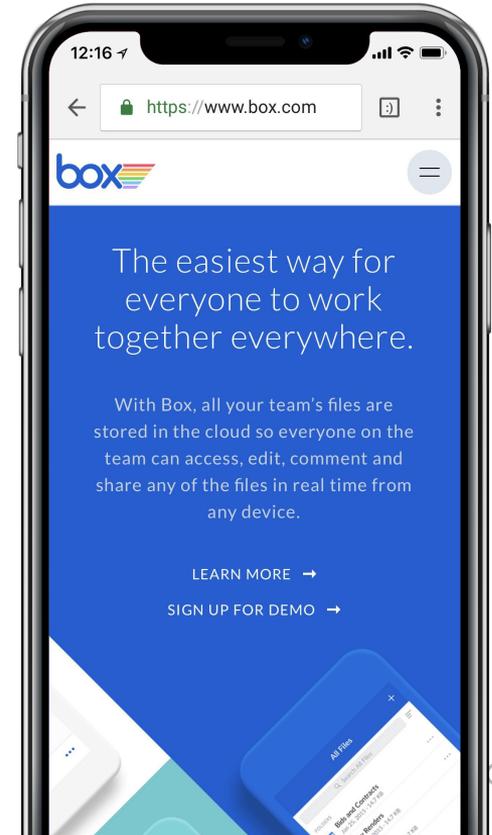


tableau.com

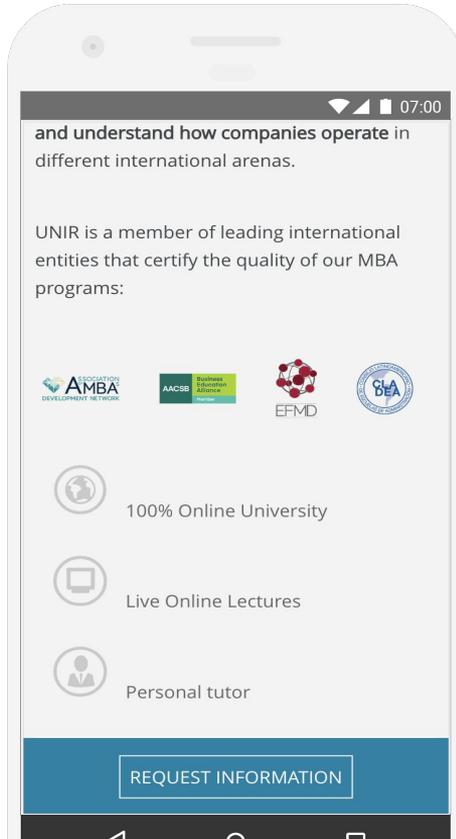


box.com

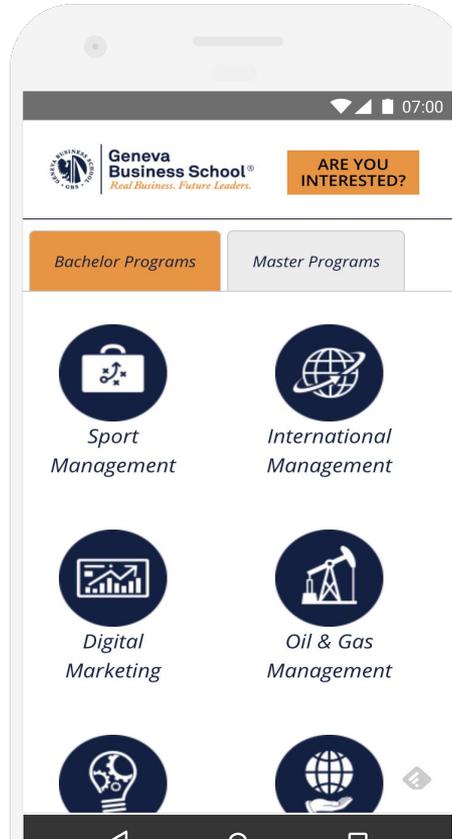


Clear value propositions

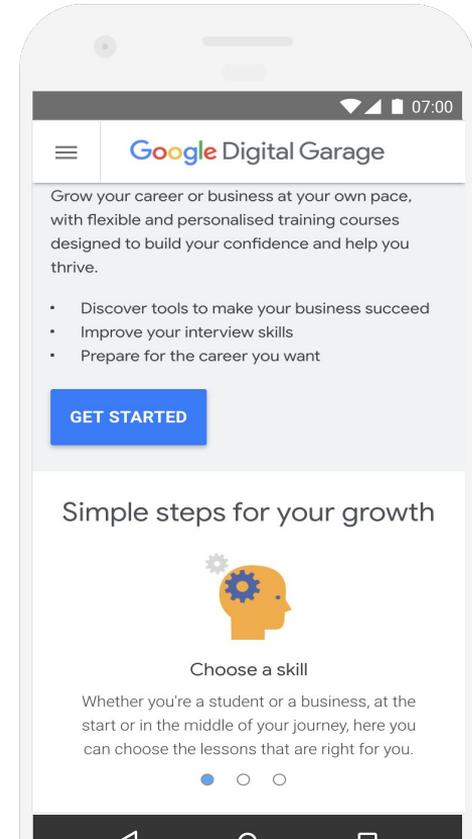
en.unir.net



gbsge.com



learndigital.withgoogle.com



Use social proof to gain user trust

lemonade.com



wordpress.org

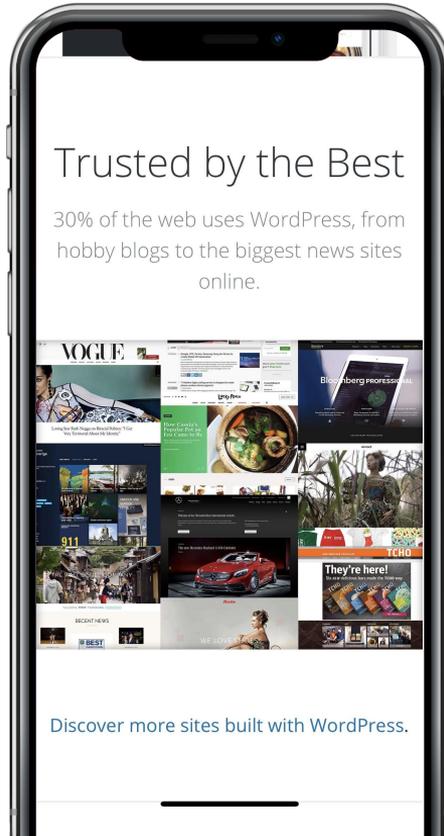
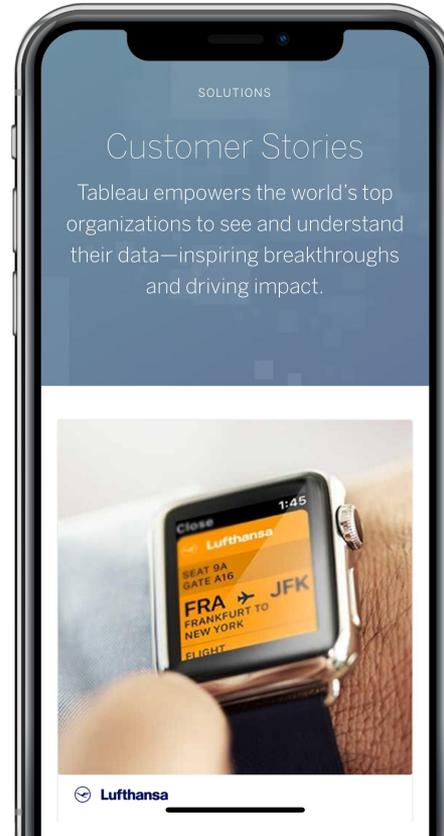
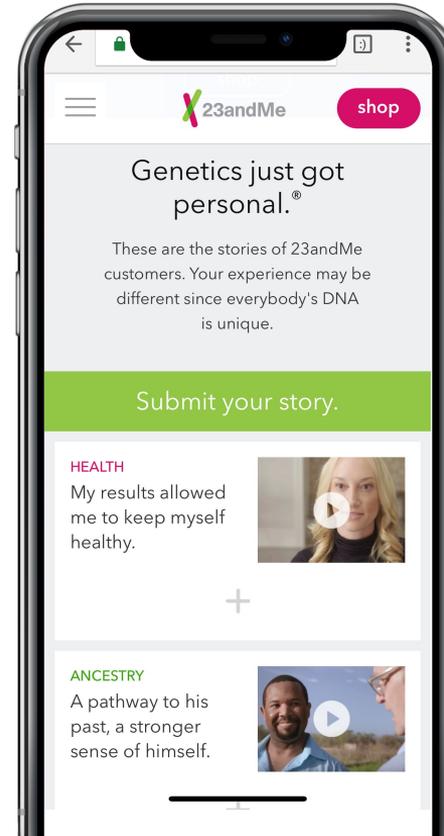


tableau.com



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.”

Social Proof is powerful for trust

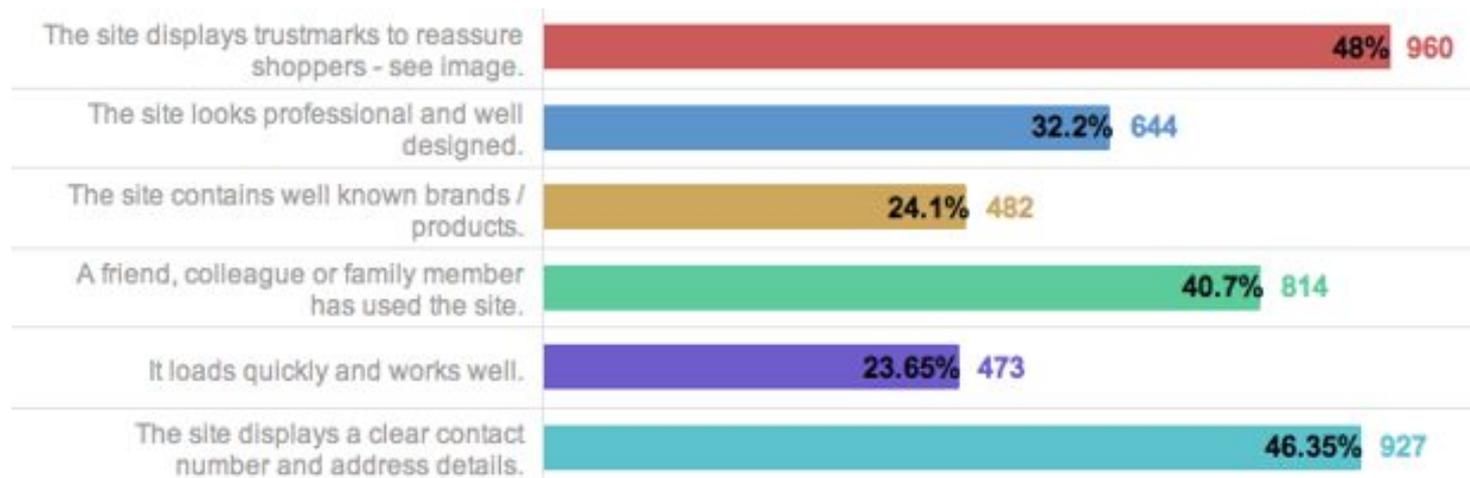
According to a Nielsen report **70% of consumers trust consumer opinions online.**
63% of consumers say they are more likely to buy from a website that displays reviews.

Social proof can be displayed with:

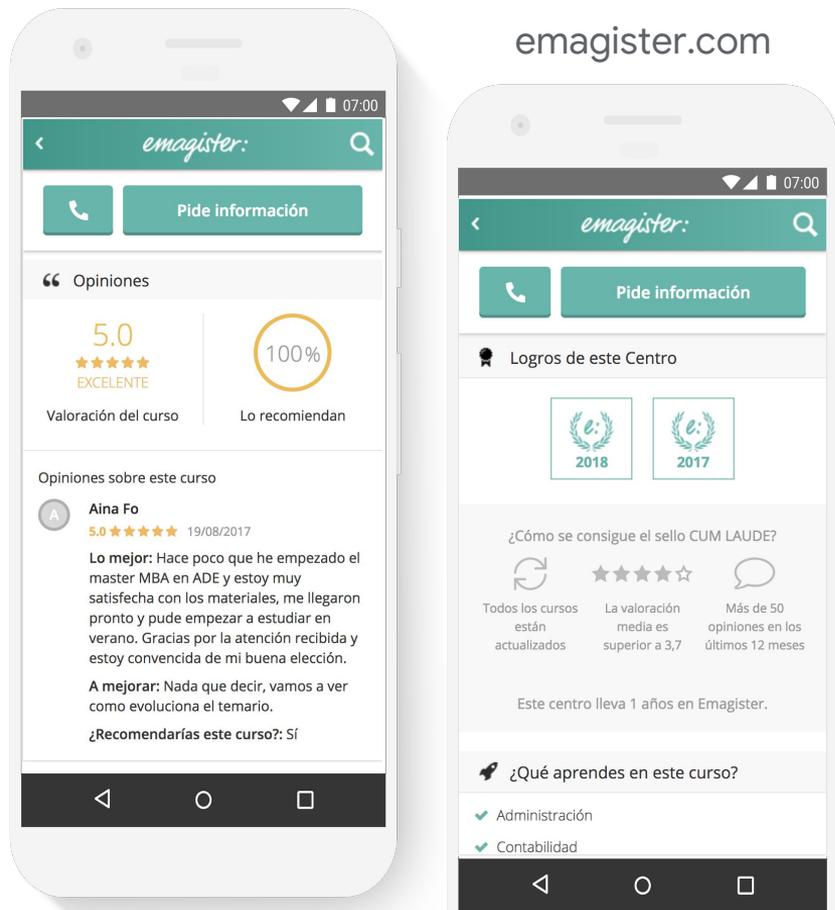
- Testimonials
- Number of people using your services/products
- User ratings

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.

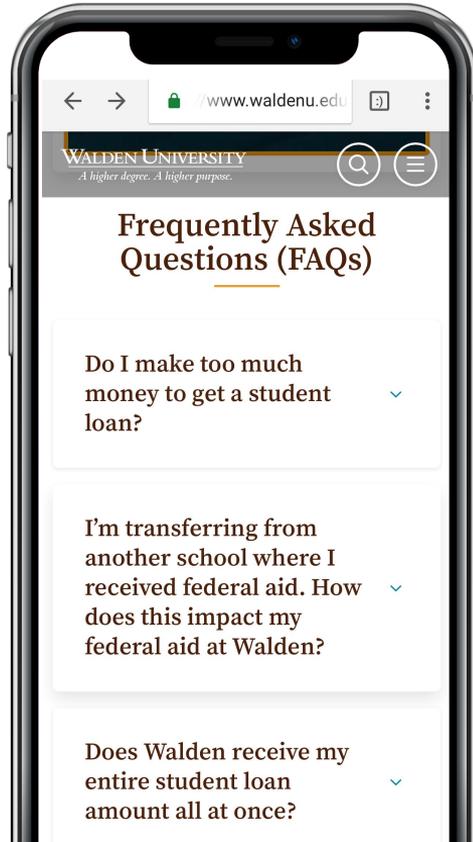


Homepage best-in-class: Social proof



Homepage best-in-class: Provide value before asking for user info

waldenu.edu



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

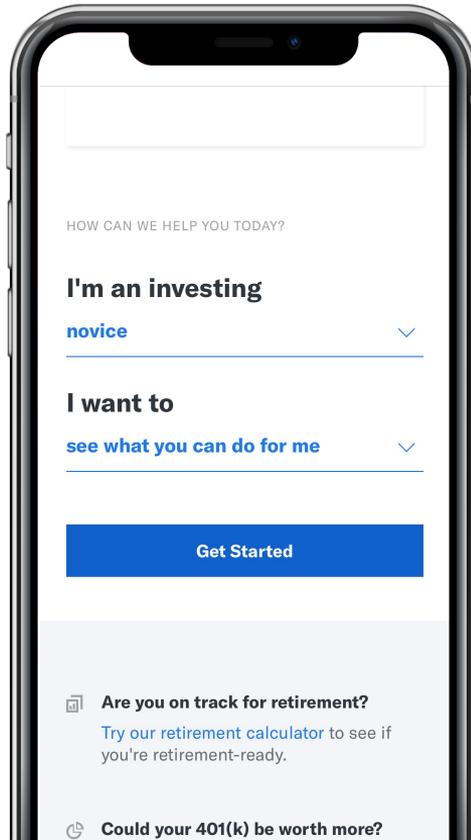
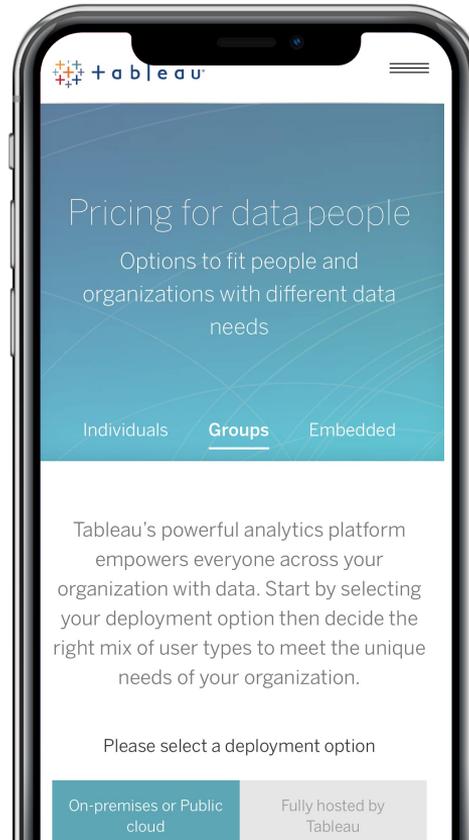
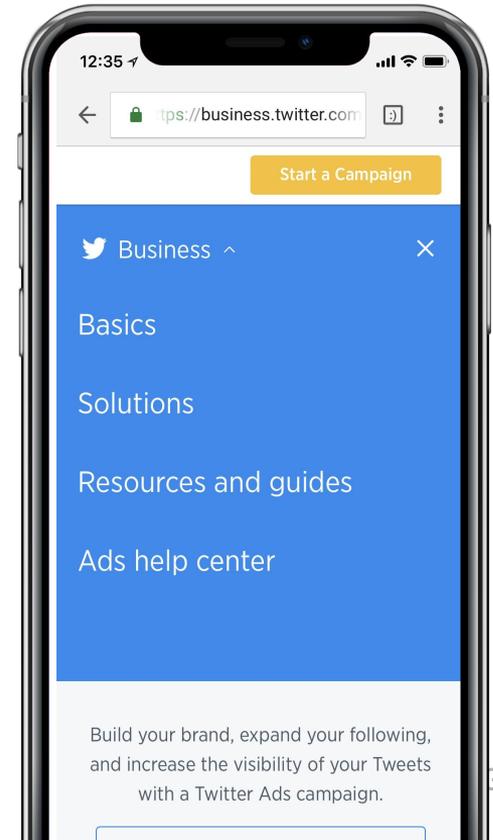


tableau.com



business.twitter.com



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:

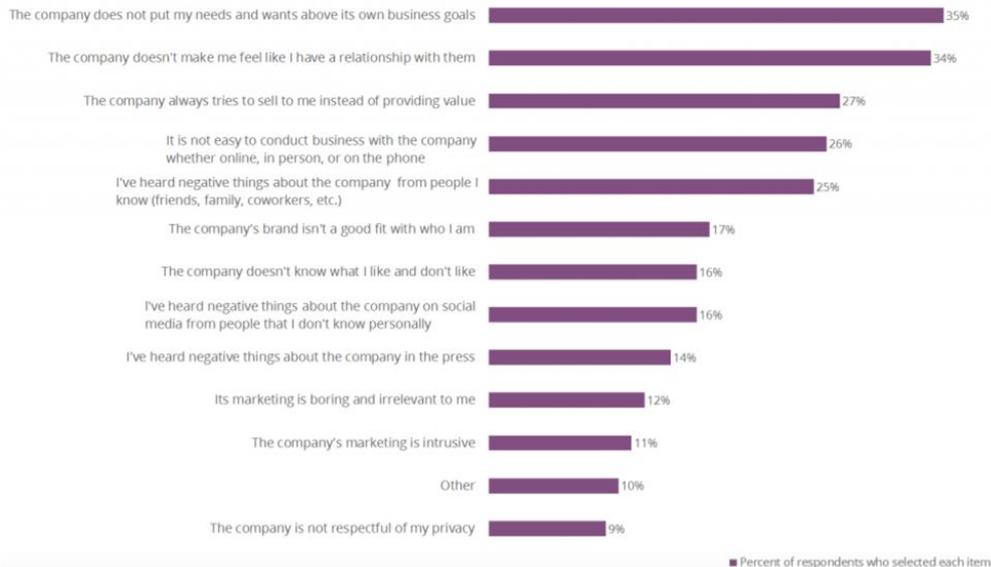
1. <https://www.nngroup.com/articles/reciprocity-principle/>

2. <http://unbounce.com/docs/The-Ultimate-Guide-To-Conversion-Centered-Design-ThemeForest.pdf>

Don't rush commitment

Consider what your users want and not what you need them to do

Thinking about the marketing of [the company they were highly unsatisfied with] which of the following is true about your experience? Select all that apply.

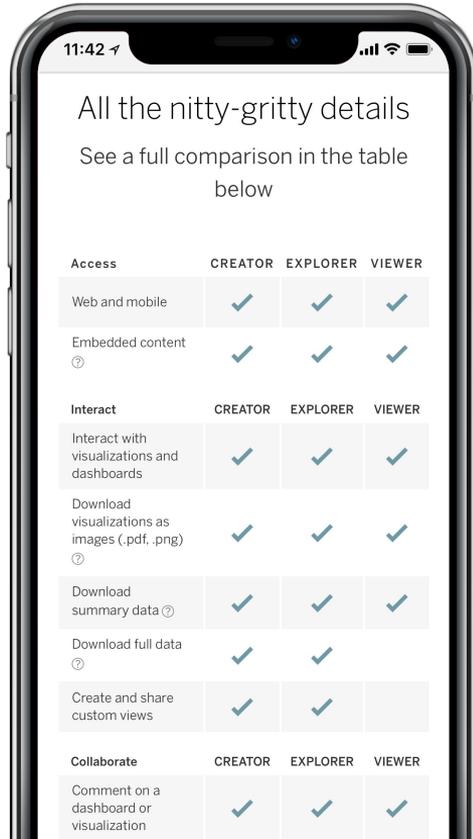


The main reasons Users identify when they were were unsatisfied with a brand/company are:

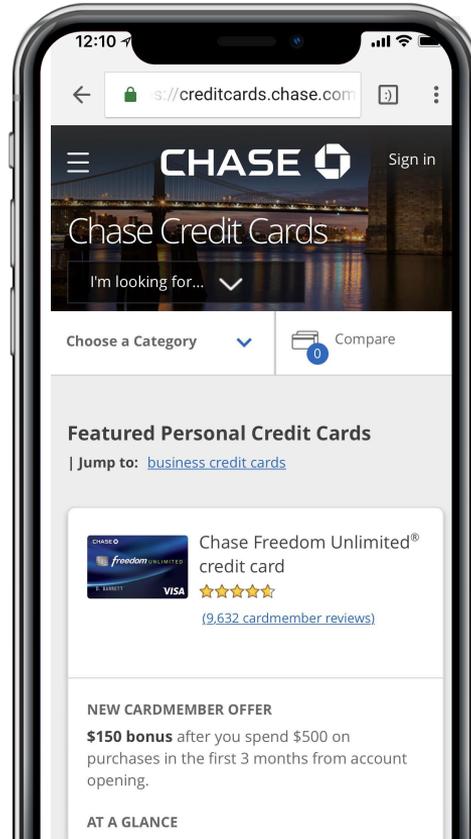
- The company does not put my needs above its own business goals
- The company does not make me feel like I have a relationship with them
- The company always tries to sell to me instead of providing value

Make decisions easy (don't let paralysis lead to drop off)

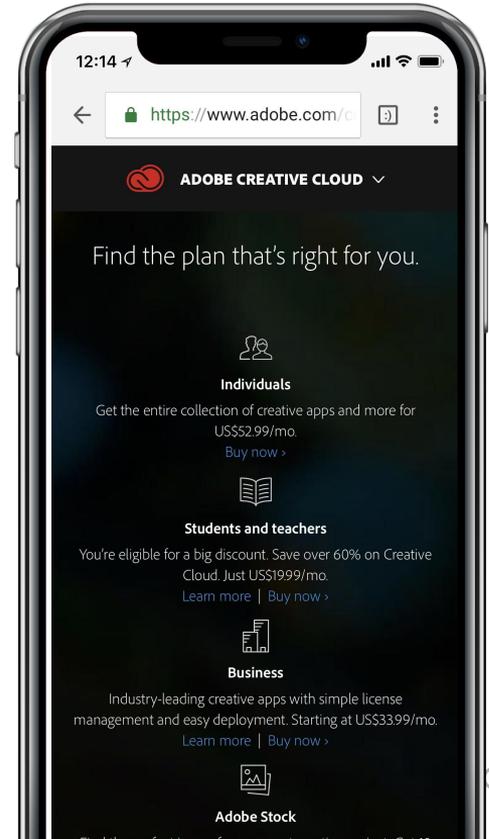
tableau.com



creditcards.chase.com



adobe.com

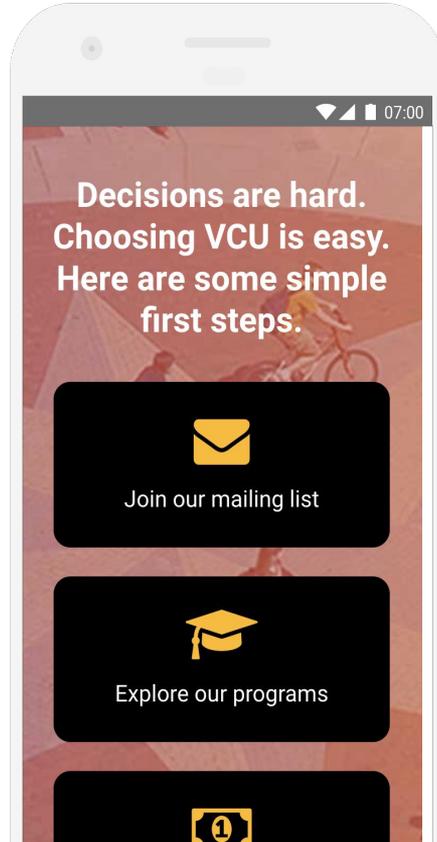


Homepage best-in-class: Make required decisions easy

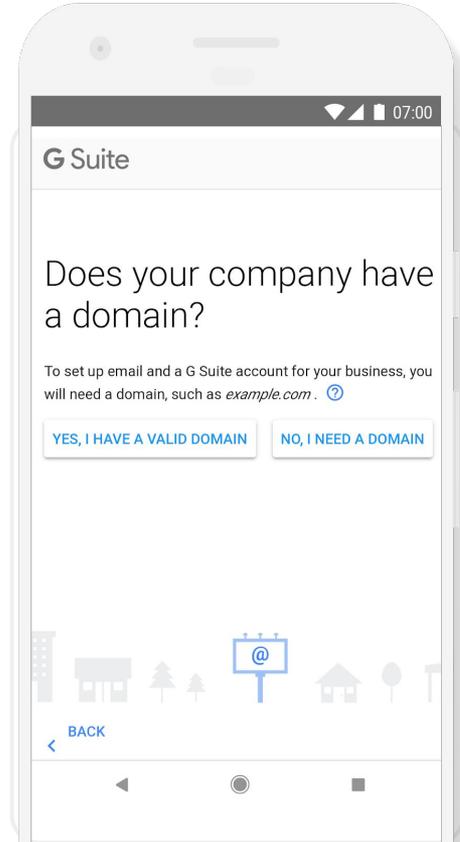
emagister.com



vcu.edu

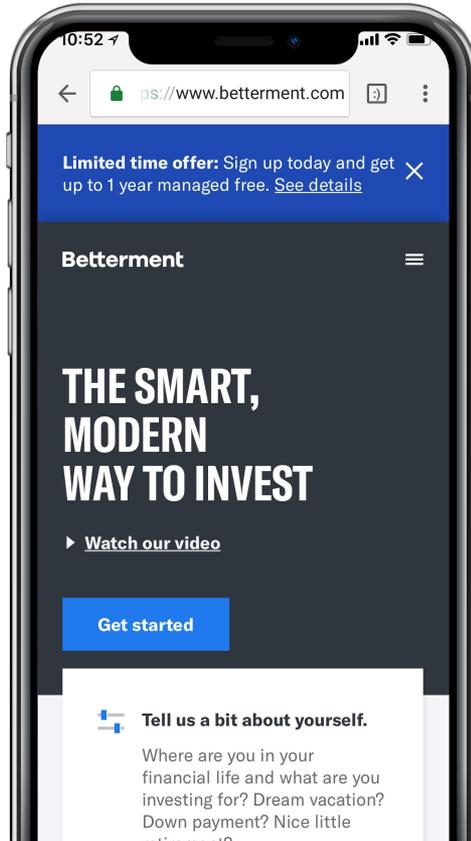


gsuite.google.com

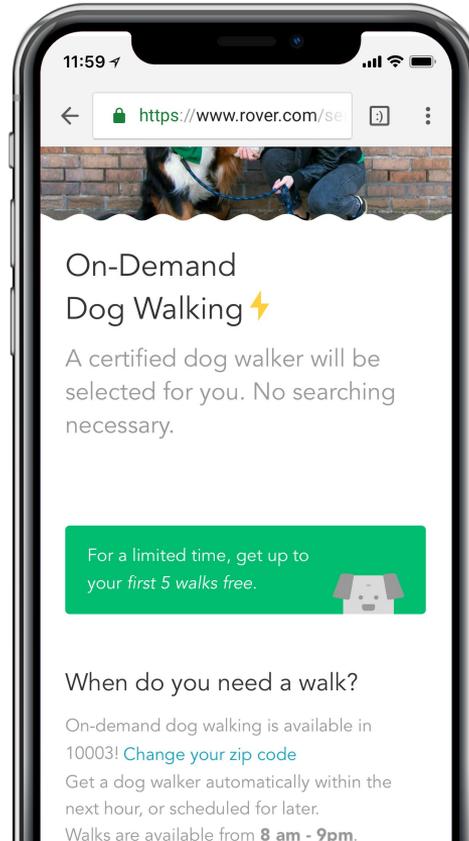


Add urgency to entice users to take action

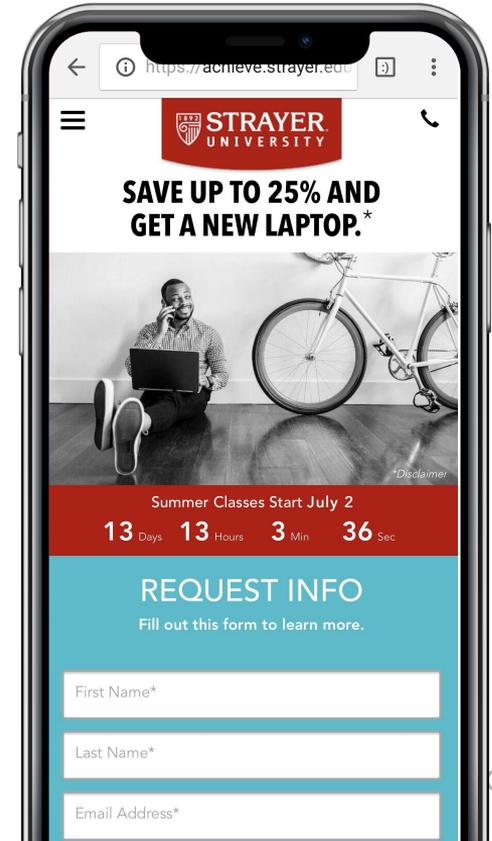
betterment.com



rover.com



achieve.strayer.edu



“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**

Before

Variation A:



Like this deal? [f Like](#) (35)

\$29 ~~\$79~~
one-off fee

100% Money Back Guarantee
We want happy customers who benefit from the opportunities included in this package. If you buy this package and aren't satisfied email us within 7 days and we'll refund your money. No questions asked.

How can we give away all of this for \$29?

After

Variation B:



Like this deal? [f Like](#) (35)

Time Left to Download: **19mins 12secs**

\$29 ~~\$79~~
one-off fee

Bundles Bought: **432** Status: **Almost Ended**

100% Money Back Guarantee
We want happy customers who benefit from the opportunities included in this package. If you buy this package and aren't satisfied email us within 7 days and we'll refund your money. No questions asked.

1. <https://conversionxl.com/blog/creating-urgency/>

Typing on mobile is hard

me_every_time@|

Homepage best-in-class: **Autofill**

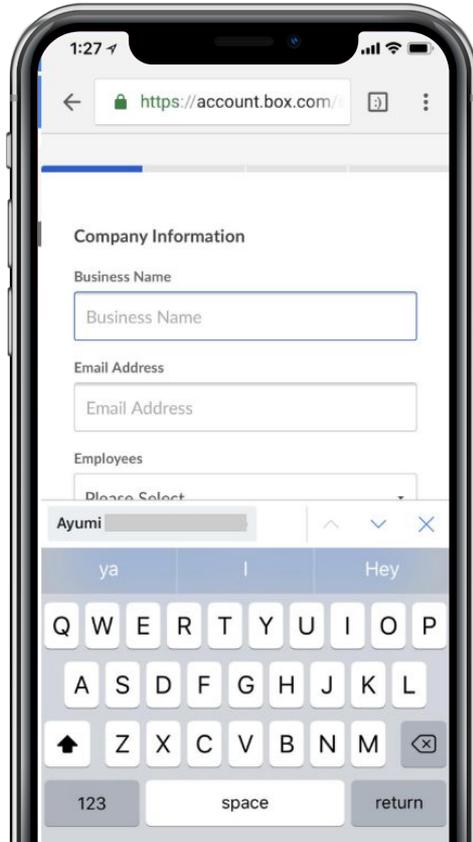
The screenshot shows a mobile app interface for THREDUP. At the top, the status bar displays signal strength, Wi-Fi, and the time 07:00. The app header features the THREDUP logo. Below the logo is a section titled "1. Shipping Info" with a green underline. The form contains several input fields: "First Name", "Last Name", "Street Address" (with a placeholder "Enter a location"), "Apt #, Floor, etc (Optional)", "City", "State", and "Zip Code". A dropdown menu for "How did you hear about us? (Optional)" is shown with "--" and a downward arrow. At the bottom, there is a section for "Shipping options (estimated)" with a question mark icon.

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

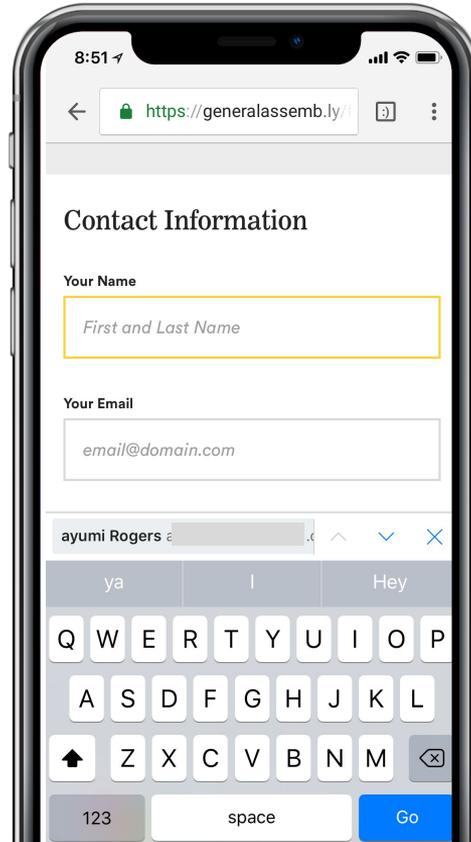
- Exit points limited after cart
- Reduced number of fields -- No second address line, no optional info
- Auto-fill used
- In-line validation (section turns green)
- Address info uses Google Places API to autofill 5 shipping fields
- Credit card fields use correct keypads
- Billing is shipping by default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

Use Autofill to reduce work for the user

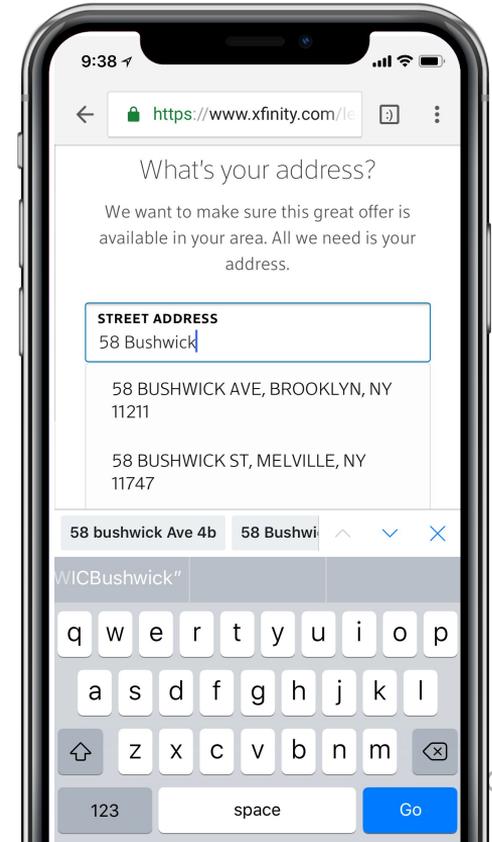
box.com



generalassemb.ly



xfinity.com



Reduce the number of fields

Use full name

Contact Information

Your Name

Your Email

Your Phone Number

What would you like to learn?

Use Google Places Autocomplete API ([link](#))

THREDUP

1. Shipping Info

First Name

Last Name

Street Address

534 Divisadero Street, San Francisco, CA, United States
534 Divisadero Street Fresno, CA, United States
534 Divisadero Street Mendota, CA, United States
534 Divisadero Street Pacific Grove, CA, United States
534 Divisadero Street Visalia, CA, United States
powered by Google

Shipping options (estimated) ?

Check billing as shipping by default

Zip Code *

Phone *

Email *

Shipping same as billing address

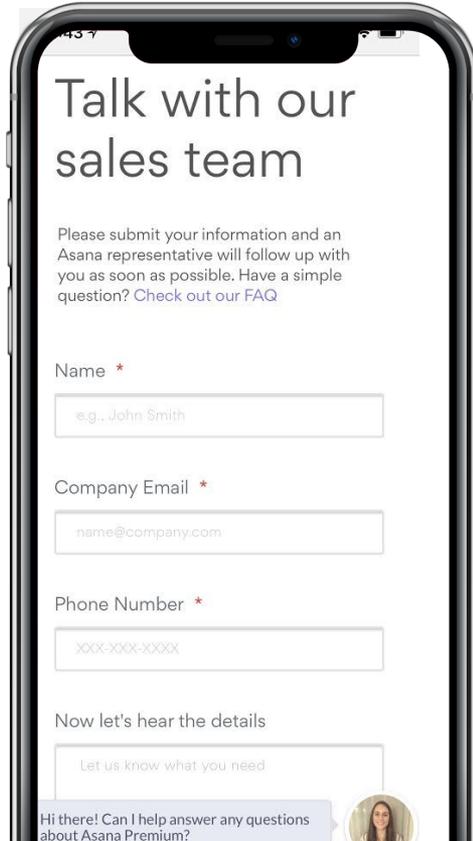
ENTER PAYMENT INFO

TOP OF PAGE

FOLLOW US

Required fields

Asana.com



Talk with our sales team

Please submit your information and an Asana representative will follow up with you as soon as possible. Have a simple question? [Check out our FAQ](#)

Name *

e.g., John Smith

Company Email *

name@company.com

Phone Number *

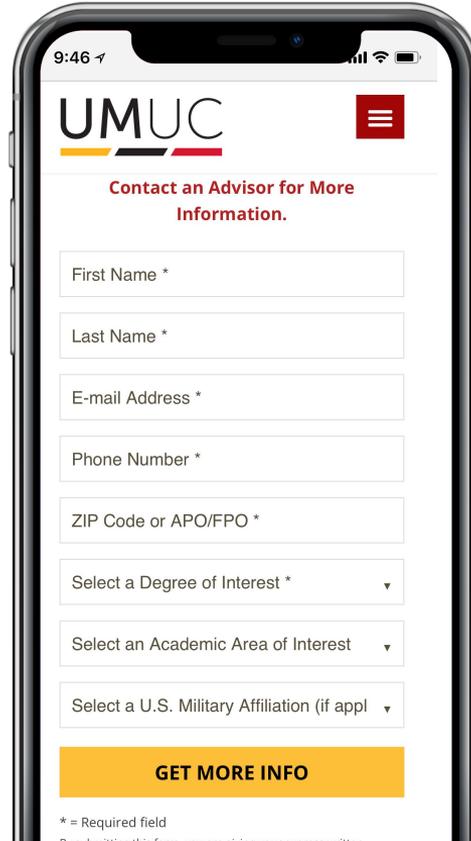
xxx-xxx-xxxx

Now let's hear the details

Let us know what you need

Hi there! Can I help answer any questions about Asana Premium?

UMUC.edu



UMUC

Contact an Advisor for More Information.

First Name *

Last Name *

E-mail Address *

Phone Number *

ZIP Code or APO/FPO *

Select a Degree of Interest *

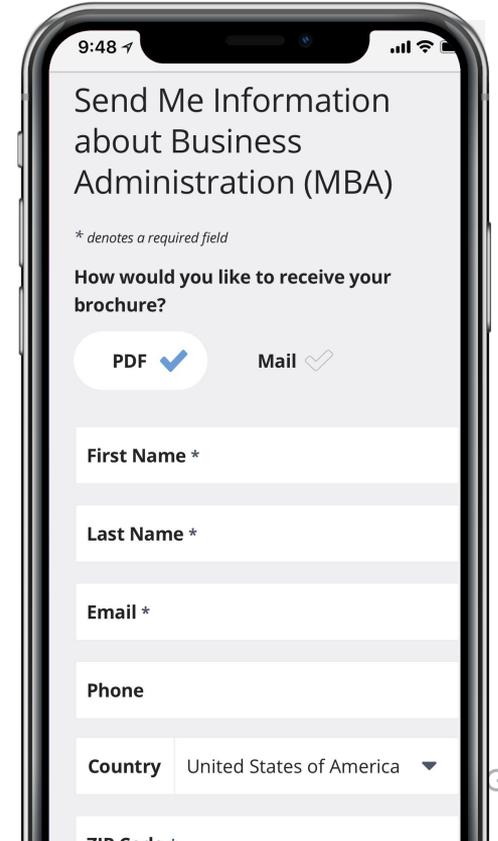
Select an Academic Area of Interest *

Select a U.S. Military Affiliation (if appl) *

GET MORE INFO

* = Required field

worldcampus.psu.edu



Send Me Information about Business Administration (MBA)

* denotes a required field

How would you like to receive your brochure?

PDF Mail

First Name *

Last Name *

Email *

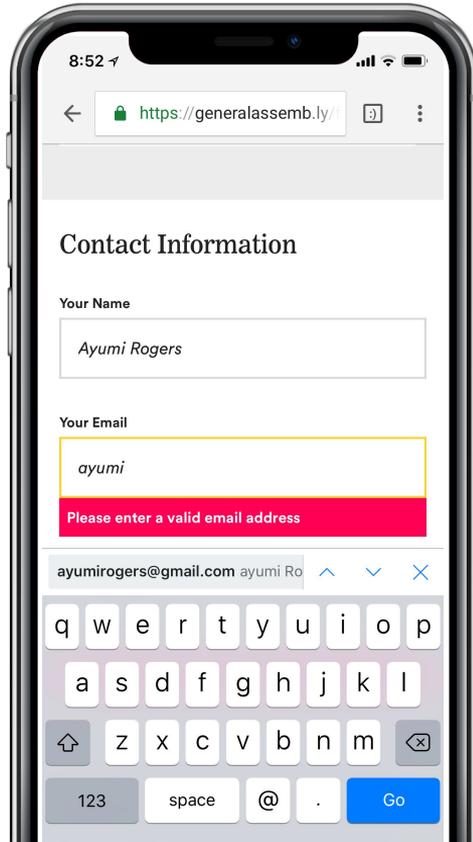
Phone

Country United States of America ▼

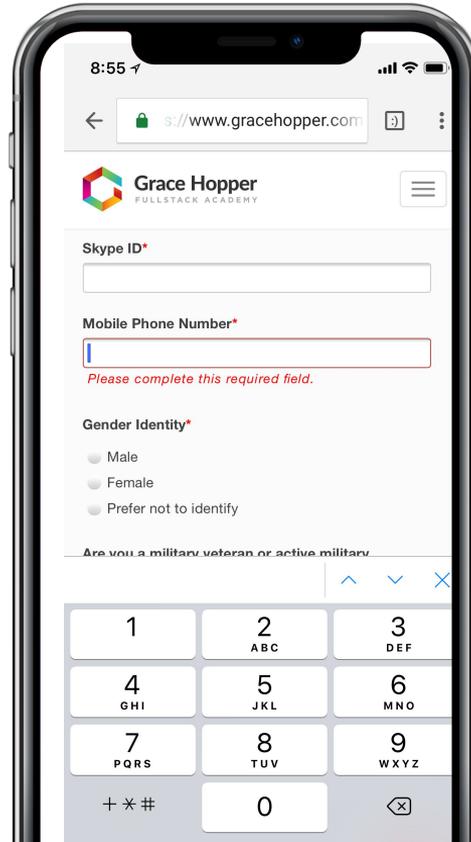
ZIP Code *

In-line validation

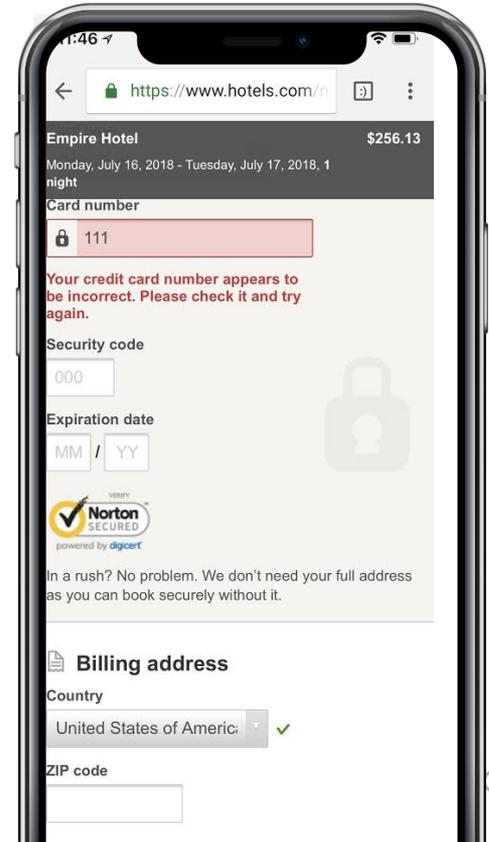
generallasemb.ly



gracehopper.com

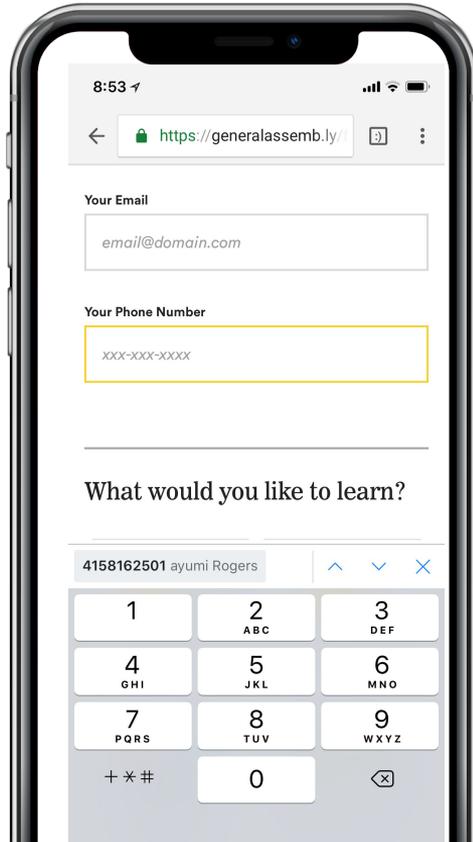


hotels.com

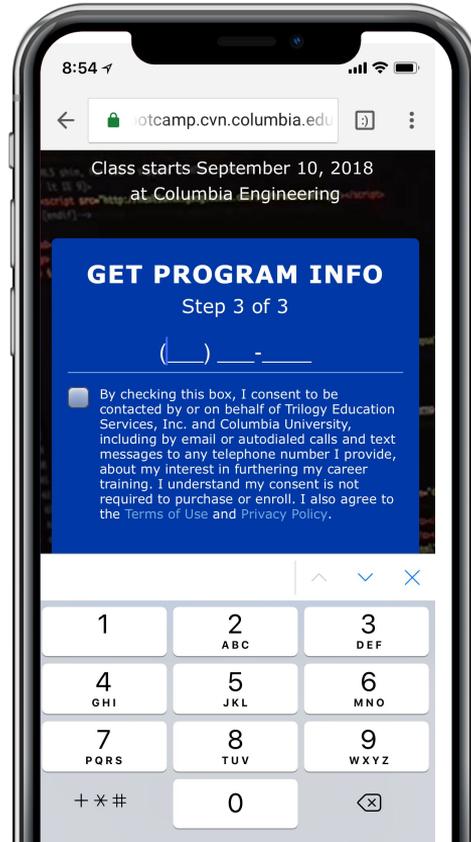


Correct keypads

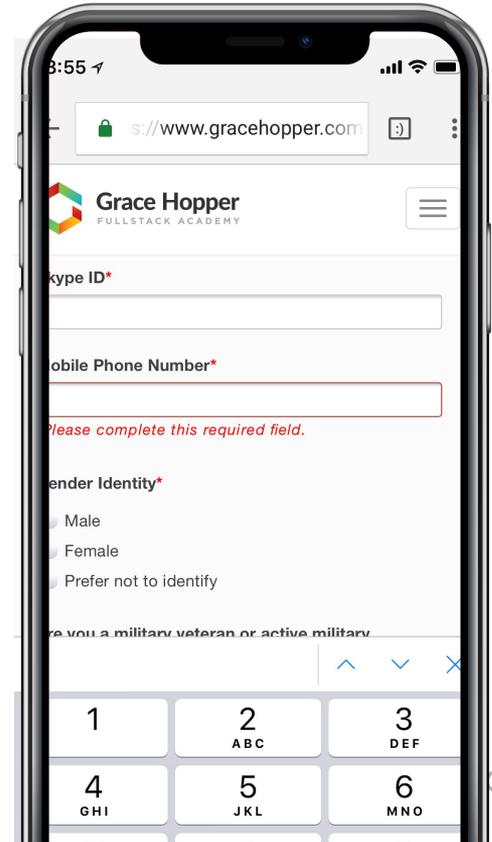
generalassemb.ly



bootcamp.cvn.columbia.edu

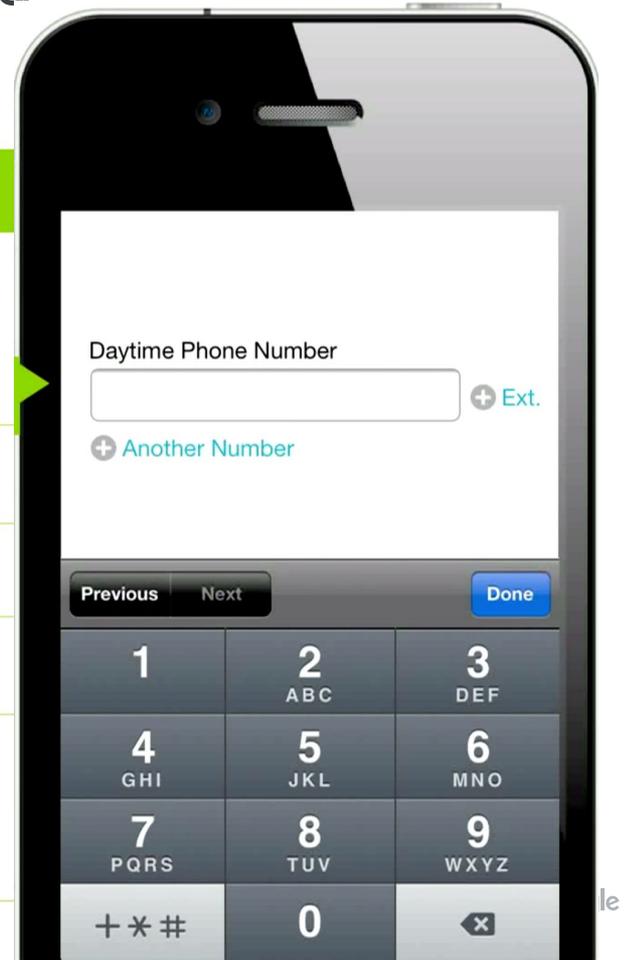


gracehopper.com



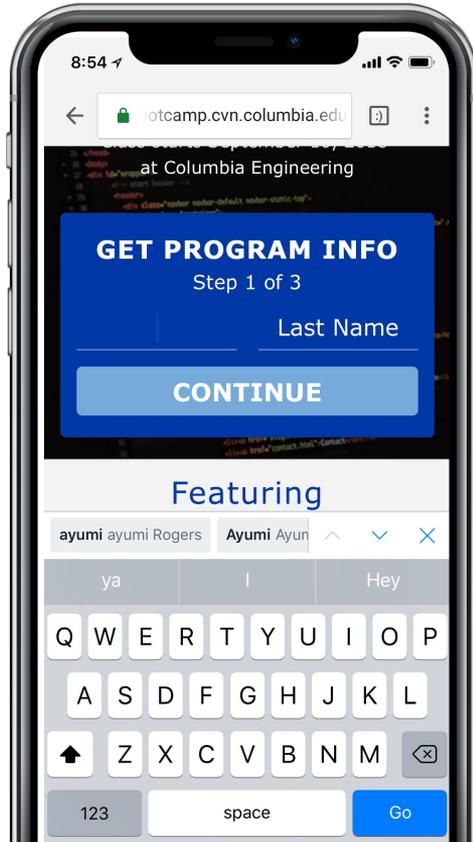
Ensure that the correct input type is used

Input Type	HTML
number	<pre><input type="number" min="2" max="10" step="2" value="6"></pre>
email	<pre><input type="email"></pre>
url	<pre><input type="url"></pre>
date	<pre><input type="date"></pre>
range	<pre><input type="range" min="2" max="10" step="2" value="6"></pre>

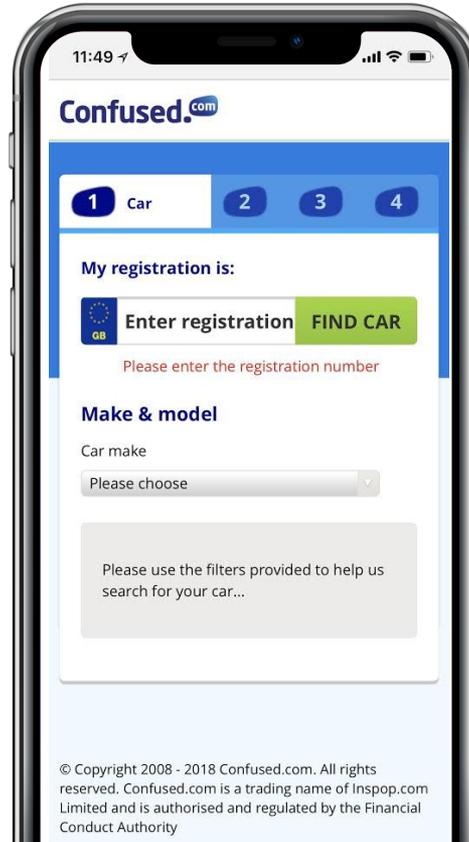


Use pagination or progress bar if more than 2 steps in conversion flow

bootcamp.cvn.columbia.edu



confused.com



geico.com



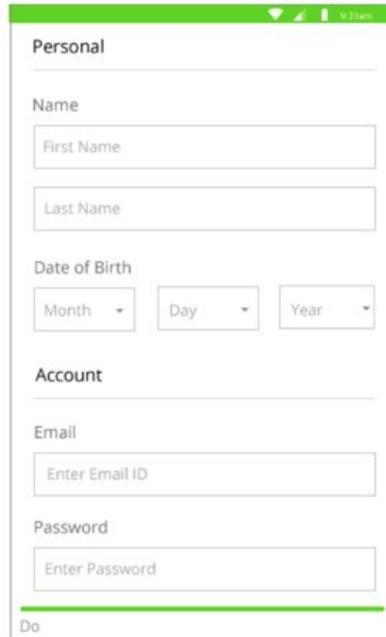
Form optimization best in class: (Single Page): **Warby Parker**

The screenshot shows a mobile app interface for Warby Parker. At the top, the status bar displays signal strength, Wi-Fi, and the time 07:00. Below the status bar, the app header reads "WARBY PARKER". A navigation bar contains three tabs: "Information" (which is underlined), "Prescription", and "Review". The main content area is titled "Your details" and contains several input fields: "First and Last Name", "Email", "Password", and "Phone". Below these fields is a checkbox labeled "Text me updates about my order! And yes, I agree to these terms." with an information icon. At the bottom of the form, there is a section titled "Ship to" with a "First and Last Name" input field. The bottom of the screen is blurred, showing a navigation bar.

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



Personal

Name

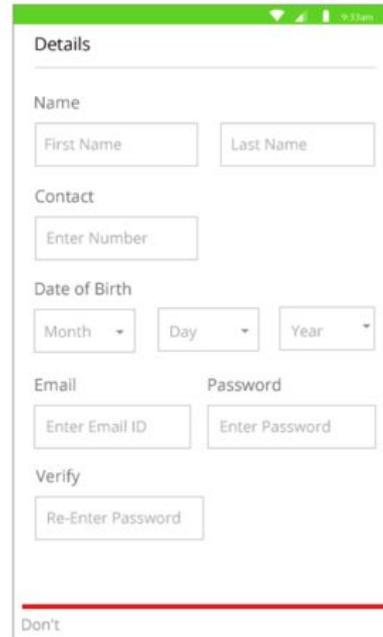
Date of Birth

Account

Email

Password

Do



Details

Name

Contact

Date of Birth

Email

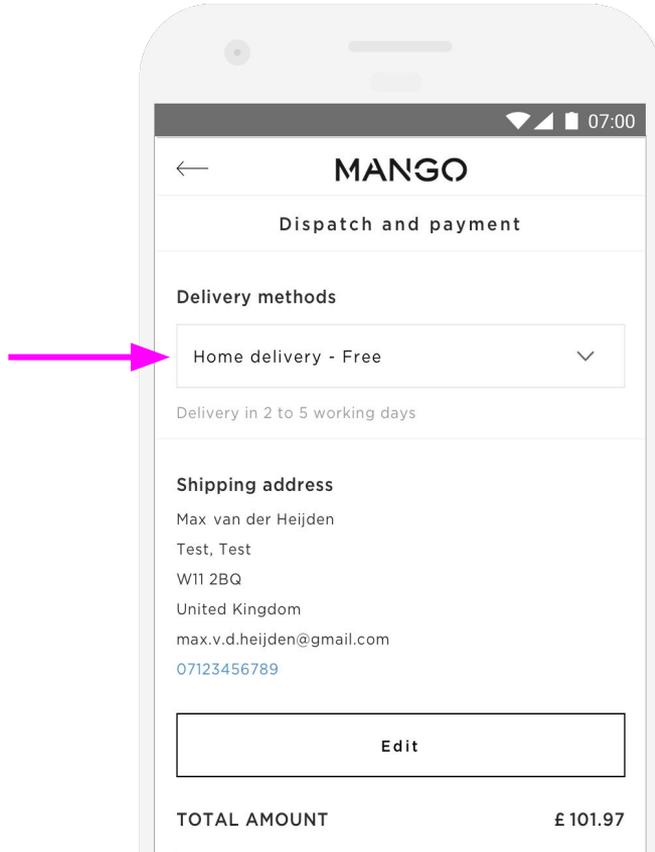
Verify

Don't

“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.)”

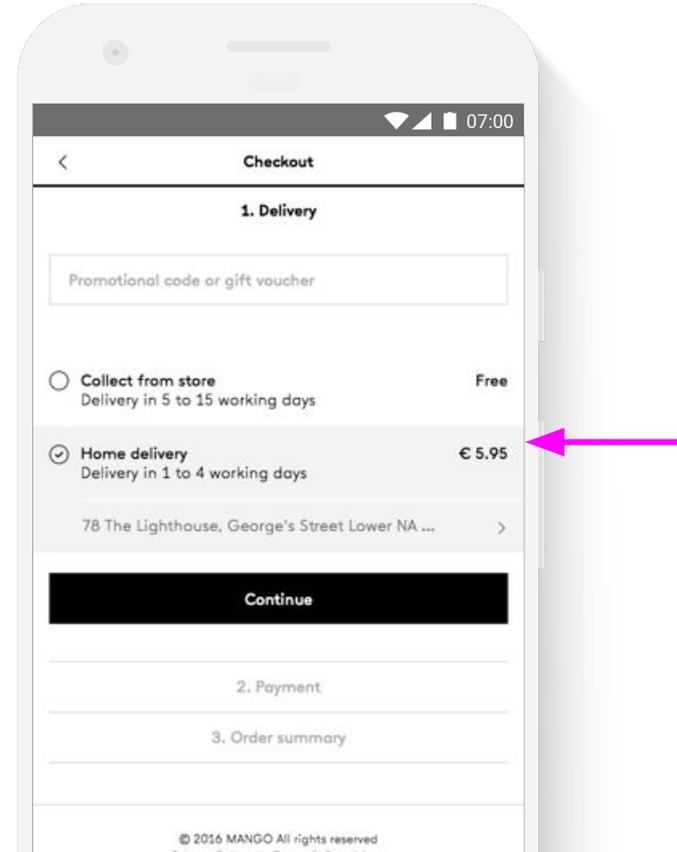
Don't use drop downs if less than 3 options

Before



VS.

After



Thank You