DEUX LABS / SELF-GUIDED OPTIMIZATION SERIES

Optimize What You've Built

A practical conversion optimization guide for solo entrepreneurs and early-stage e-commerce and SaaS teams



INSIDE THIS GUIDE

One shared optimization system with dedicated e-commerce and SaaS application tracks, practical worksheets, sample answers, and low-traffic alternatives.

Brion K. Mills • Founder & CEO, DEUX Labs

Conversion without compromise. Experience without friction.

Welcome: You Built It. Now Let's Make It Work Better.

You got it built. That matters.

Maybe you built an online store from a theme. Maybe you launched a SaaS product with a no-code stack, a developer, or a very determined collection of tools. Whatever path you took, you now have something real that people can visit, evaluate, use—and occasionally abandon without telling you why.

That last part is where things get frustrating. Your store or SaaS experience may look perfectly respectable, yet visitors are not purchasing, signing up, activating, subscribing, or taking the next step as often as you expected. You may be tempted to blame the design, chase more traffic, copy a competitor, or rebuild the entire experience.

HERE'S THE GOOD NEWS

You probably do not need to rebuild everything. You need to understand what is—and is not—working, then improve the right things in the right order.

Optimization is not endless tinkering

Optimization means learning how well your digital experience helps the right people accomplish something valuable—and making informed improvements when it does not. It connects two things that are often treated separately:

- The user's experience: Can people understand, trust, navigate, and use what you built?
- The business outcome: Does that experience help the business generate meaningful actions and results?

A better user experience does not compete with conversion. When done responsibly, it makes conversion more likely because people can understand the offer, find what they need, make decisions with confidence, and complete the next step without unnecessary friction.

This is not a bag of growth hacks

You will not find a universal button color, a magic headline formula, or a list of supposedly guaranteed conversion tricks here. Context matters. Your customers, offer, traffic, price, product, and technology all influence what may or may not work.

You also do not need to move your button three pixels to the left because someone on LinkedIn called it a growth hack.

Instead, this guide will help you slow down just enough to make better decisions: define what matters, observe the experience, collect evidence, identify friction, prioritize improvements, and measure what happens next.

What You'll Walk Away With

By the end of the full guide, you will have:

- ☐ One clearly defined primary conversion goal
- ☐ A mapped customer path for that conversion
- ☐ A basic performance baseline
- ☐ A documented list of friction points
- ☐ Evidence-informed improvement ideas
- ☐ A prioritized optimization backlog
- ☐ One prepared improvement with a measurement plan
- ☐ A practical 30-day optimization roadmap

A note about results

This guide will help you make more thoughtful, evidence-informed decisions. It cannot guarantee that a particular change will increase conversions. No responsible guide can. What it can do is reduce guesswork, help you recognize weak assumptions, and give you a repeatable way to learn from what your customers actually do.

THE OPERATING PRINCIPLE

Evidence over opinion. Clarity over cleverness. Meaningful improvement over constant redesign.

How to Use This Guide

This is a working guide, not a book you are expected to passively read from cover to cover.

Each chapter teaches one part of the optimization process and ends with a practical exercise. Complete the exercises using one real store or SaaS journey. You will get more value from applying each section imperfectly than from reading everything and promising yourself you will come back later.

Choose one conversion journey

Do not try to optimize your entire business at once. Select one meaningful journey—for example, discovering and purchasing a product, or moving from a SaaS landing page through signup and activation.

Use what you have

You do not need an enterprise analytics stack or a full research team. Customer emails, sales conversations, support questions, reviews, basic analytics, form submissions, and your own structured observations can all provide useful evidence.

Keep an evidence file

Create one place to store screenshots, notes, customer language, performance numbers, recordings, survey responses, and improvement ideas. Do not trust yourself to remember where every insight came from.

Complete the checkpoints

Each chapter has a clear output. Finish that output before moving forward. The goal is to leave with a usable optimization plan—not an impressive collection of highlighted paragraphs.

Follow the sequence

1. Define what matters.
2. Understand the customer and their path.
3. Establish a baseline.
4. Find and define friction.
5. Develop and prioritize improvements.
6. Make a controlled change.
7. Measure, learn, and repeat.

DO NOT SKIP STRAIGHT TO SOLUTIONS

A change can be easy to implement and still solve the wrong problem. The diagnostic work is what makes the later recommendations useful.

One System, Two Application Tracks

E-commerce and SaaS businesses share the same optimization discipline. They do not share an identical customer journey.

The core method in this guide remains consistent: define the goal, understand the customer, map the journey, establish a baseline, diagnose friction, prioritize opportunities, make a controlled change, and measure what happens. Where the application meaningfully differs, you will see an e-commerce track and a SaaS track.

Core decision	E-commerce track	SaaS track
Primary outcome	Purchase	Trial, demo, or subscription
Typical path	Homepage or collection → product → cart → checkout	Landing page → signup → onboarding → activation → upgrade
Baseline	Conversion rate, add-to-cart rate, average order value	Signup rate, activation rate, trial-to-paid rate
Common friction	Discovery, product trust, shipping, checkout	Value clarity, signup, onboarding, feature adoption
Result	Revenue and transaction behavior	Activation, retention, and subscription behavior

How Shopify fits

Shopify is one useful and frequently referenced e-commerce example—not a requirement for using the guide. If you sell through Shopify, a step may appear in your theme, product template, cart, or checkout settings. On another platform, find the equivalent part of the journey and apply the same principle.

CHOOSE YOUR TRACK

Mark one primary track for the journey you are optimizing: ☐ E-commerce ☐ SaaS. Read both when useful, but complete each worksheet for only one journey at a time.

Opening Diagnostic

What Made You Download This Guide?

Choose the statement that most closely describes your current situation. You can select more than one, but circle or mark the one that feels most urgent.

☐ People visit my website or app, but they do not contact me, sign up, purchase, or take the next step.

☐ Visitors start an important process but do not finish it.

☐ People do not seem to understand what I offer or why it matters.

☐ I am getting traffic, but I do not know whether the traffic is producing meaningful results.

☐ The experience looks fine to me, but it is not performing as well as I expected.

☐ I keep making changes, but I do not know whether they are helping.

☐ I am considering a redesign but do not know whether a redesign is actually necessary.

☐ I have little or no usable data and do not know where to begin.

Something else is happening:

_____

_____

_____

The one problem I most want to investigate is:

_____

_____

_____

_____

CHECKPOINT

Write the problem as you currently understand it. You are not committing to this explanation; later chapters will help you test whether it is the real problem.

CHAPTER 1

Start With the Business Goal

Before you change the experience, decide what the experience needs to accomplish.

One of the fastest ways to waste time is to improve a website or app without agreeing on what 'better' means. A cleaner layout might be better. More time on a page might be better. More clicks might be better. But none of those outcomes automatically helps the customer or the business.

Your first job is to connect a business outcome to a meaningful action a customer can take through the experience.

WHY IT MATTERS
Without a defined conversion goal, every design preference can masquerade as a strategy.

What counts as a conversion?

A conversion happens when a user completes an action that matters to the business. A purchase is a conversion, but it is not the only kind. The right conversion depends on your business model and what the user is ready to do.

Business type	Primary conversion	Supporting actions
E-commerce	Complete a purchase	View a product, add to cart, begin checkout
E-commerce	Purchase again or increase order value	Return to a product, add a complementary item, use replenishment
Self-serve SaaS	Start a trial or subscription	View pricing, create an account, begin onboarding
Sales-led SaaS	Request or attend a qualified demo	View a use case, review proof, begin the demo form
SaaS product	Activate a key feature or upgrade	Complete onboarding, invite a teammate, reach a usage milestone

Primary and supporting conversions

Your primary conversion is the most valuable action the experience is designed to support. Supporting conversions are smaller actions that signal progress or intent.

For an e-commerce store, the primary conversion may be a completed purchase; viewing a product, adding to cart, and beginning checkout are supporting actions. For a SaaS business, the primary conversion may be a paid subscription, while signup, onboarding completion, and activation are supporting actions. They help locate progress or friction—but they are not equal to the final business outcome.

This distinction prevents a common measurement mistake: celebrating more clicks while the number or quality of actual inquiries stays flat.

> **A NOTE ABOUT TRAFFIC**
> Traffic affects what you can confidently measure. It does not determine whether you can improve the experience.

If two people visit your website and one contacts you, that technically produces a 50% conversion rate—but it is not enough information to predict future performance. Limited traffic does not make optimization irrelevant. It changes which methods make sense and how cautiously you should interpret the result. Later chapters will show you alternatives when a reliable A/B test or stable conversion-rate comparison is not realistic.

Business Goals, User Goals, and Website Actions

A useful conversion goal sits at the intersection of three perspectives:

1 BUSINESS GOAL

What meaningful result does the business need—revenue, qualified leads, subscriptions, activation, retention, or another outcome?

2 USER GOAL

What is the customer trying to accomplish—solve a problem, compare options, get help, buy something, or complete a task?

3 EXPERIENCE ACTION

What observable action connects the user's progress to the business outcome?

An e-commerce business may need revenue while the shopper wants the right product delivered on acceptable terms; the connecting action is a completed, retained purchase. A SaaS business may need recurring revenue while the user wants to solve a recurring task; the connecting action may be a subscription preceded by successful activation.

That is more useful than choosing 'increase engagement' as the goal. Engagement may support the journey, but it does not explain what outcome matters or what action should indicate progress.

Every page or screen should have a job

Not every page needs to close the sale. A homepage may establish relevance and direct visitors. A services page may help people understand and compare. A case study may provide proof. A pricing page may help visitors assess fit. A form may complete the conversion.

The question is not whether every page has the same call to action. The question is whether each page helps the visitor make the next useful decision.

ASK THIS

If this page disappeared tomorrow, what part of the customer's decision would become harder? If you cannot answer, the page may not have a clear job.

Common Mistakes

Choosing too many primary conversions

When everything is equally important, the experience often becomes a wall of competing buttons and messages. Select one primary conversion for the journey you are optimizing. Other actions can still exist, but they should not all compete for first place.

Using a vague goal

'Improve engagement,' 'make the site better,' and 'get more activity' are directions, not measurable goals. Define the specific action and why it matters.

Measuring what is easy instead of what is valuable

Page views and clicks are easy to count. Qualified leads, completed purchases, successful onboarding, and customer value are more useful. Use supporting metrics to understand the journey—not to replace the outcome.

Ignoring conversion quality

More form submissions are not automatically better if most are spam, poor-fit inquiries, or people who misunderstood the offer. A useful conversion goal considers both quantity and quality.

Assuming the website owns the entire outcome

Pricing, availability, product quality, sales follow-up, market demand, and traffic quality can all affect results. Optimization helps the experience do its job; it cannot compensate indefinitely for problems elsewhere in the business.

DO THIS NOW

Choose one journey and define one primary conversion. You can revisit other journeys later.

WORKSHEET

Conversion Goal Builder

Use this worksheet for one e-commerce or SaaS journey. Keep your answers specific enough that another person could understand what you are trying to improve.

Business track: ☐ E-commerce ☐ SaaS

SAMPLE ANSWERS

E-commerce: Increase retained purchases by helping first-time shoppers choose the right size and complete checkout with clear delivery expectations. • SaaS: Increase paid subscriptions by helping new trial users connect their data and reach their first useful report.

1. What business result should this experience support?

_____

_____

_____

2. Who is the customer or user for this journey?

_____

_____

_____

3. What is that person trying to accomplish?

_____

_____

_____

4. What is the most valuable action they can complete through the website or app?

_____

_____

_____

5. Why does that action matter to the business?

_____

_____

_____

Conversion Goal Builder — Continued

6. What supporting actions indicate that the visitor is moving toward the primary conversion?

1. _____

2. _____

3. _____

7. Which pages or screens are most responsible for supporting this journey?

_____

_____

_____

_____

8. How do you currently know when the primary conversion has occurred?

☐ Analytics event or conversion

☐ Form or booking notification

☐ Purchase or payment record

☐ CRM or lead record

☐ Account or product data

☐ I do not currently track it reliably

9. Write your conversion goal in one sentence:

SENTENCE STARTER

We want to help [specific audience] complete [primary action] so they can [user outcome] and the business can [business outcome].

_____

_____

_____

_____

Chapter 1 Completion Checkpoint

Before moving to Chapter 2, confirm that you can answer each statement clearly.

- ☐ I selected one conversion journey to optimize.
- ☐ I identified the business result connected to that journey.
- ☐ I identified what the customer is trying to accomplish.
- ☐ I selected one primary conversion.
- ☐ I identified no more than three supporting actions.
- ☐ I know—or documented that I do not know—how the conversion is currently tracked.
- ☐ I wrote the conversion goal in one clear sentence.

YOUR CHAPTER 1 OUTPUT

One clearly defined conversion goal that connects a customer action to a meaningful business result.

Up next: Understand Who You're Helping

In Chapter 2, you will move beyond broad audience labels and document the customer's situation, questions, concerns, motivations, and decision needs—using evidence you may already have.

CHAPTER 2

Understand Who You're Helping

You cannot improve an experience for 'everyone.' Start with one real customer situation.

Now that you know which conversion matters, the next question is deceptively simple: who are you helping complete it? Labels such as online shoppers, small businesses, creators, or marketing teams may help with planning, but they do not tell you what a visitor needs from the experience in the moment they arrive.

Useful customer understanding is less about demographics and more about context. What happened before the visit? What are they trying to accomplish? What do they need to understand? What feels risky? What would make the next step feel reasonable?

WHY IT MATTERS

When you design around a broad audience label, you tend to fill the experience with generic claims. When you design around a customer situation, you can answer the questions that actually shape the decision.

Target market versus customer situation

A target market tells you the category of person or business you hope to serve. A customer situation tells you why that person is looking, what they are trying to resolve, and what must happen before they can act.

Broad audience label	Usable customer situation
Online shoppers	A first-time shopper comparing two similar products who needs confidence about fit, delivery timing, and the return policy before purchasing.
Small SaaS teams	A founder evaluating software after a manual process became too slow, who needs to know whether setup is realistic and the product supports a key workflow.
Existing SaaS users	A trial user who has created an account but has not yet reached the first useful outcome and is unsure what to do next.

What the Customer Brings With Them

Visitors do not arrive as blank slates.

They bring expectations, previous experiences, incomplete information, budget constraints, urgency, skepticism, and a mental picture of what a good solution should look like. Your website or app does not create all of those conditions—but it must respond to them.

The trigger

Something caused the person to look for help now. A problem became expensive, frustrating, risky, visible, or urgent. A deadline appeared. An existing solution stopped working. A recommendation created interest. The trigger shapes what feels relevant when they arrive.

The job they are trying to complete

The customer is rarely trying to 'browse your website.' They are trying to make progress: compare options, solve a problem, reduce uncertainty, complete a task, or decide whether to trust you. Your content and interface should support that progress.

The questions they need answered

- Is this meant for someone like me?
- Will this solve the specific problem I have?
- How does it work, and what happens next?
- What will it cost—in money, time, effort, or risk?
- Why should I trust this business, product, or recommendation?
- What if it does not work for me?

The concerns that can stop them

A concern is not always an objection to overcome. Sometimes it is a reasonable need for information. Price, privacy, complexity, compatibility, credibility, timing, commitment, and fear of making the wrong choice can all slow a decision.

A USEFUL DISTINCTION

Do not ask only, 'What do I want visitors to know?' Ask, 'What does this person need to understand or believe before the next step feels appropriate?'

Motivation, Ability, and Confidence

A visitor can want the outcome and still be unable—or unwilling—to complete the action.

When an important conversion is weak, it helps to examine three conditions. They overlap, but each points to a different kind of problem.

MOTIVATION • Do they want the outcome enough to act now?

The offer must feel relevant and valuable. Weak motivation may reflect poor audience fit, low urgency, an unclear benefit, or a problem that is not important enough yet.

ABILITY • Can they complete the action?

The process must be usable and realistic. Ability can be reduced by confusing navigation, inaccessible controls, long forms, technical errors, unexpected requirements, or too much effort.

CONFIDENCE • Do they feel safe choosing this path?

The person needs enough clarity and evidence to proceed. Confidence may depend on proof, transparent expectations, pricing, policies, security, credibility, or understanding what happens next.

Suppose shoppers add a product to cart but do not purchase. Motivation may weaken when the value is unclear; ability may be blocked by a poor mobile checkout; confidence may drop when shipping costs appear late. In SaaS, users may create an account but never activate because the outcome feels distant, setup is difficult, or the product requests access before explaining why.

Those explanations lead to very different improvements. This is why 'make the form convert better' is not yet a diagnosis.

REMEMBER

Conversion is not just persuasion. It also depends on whether the experience makes the desired action understandable, possible, and trustworthy.

Use the Customer's Language

Your customers are already telling you how they understand the problem.

Businesses naturally develop internal language: service names, product categories, processes, acronyms, and positioning statements. Customers often describe the same thing differently. Their words tend to be more concrete because they begin with the situation they are living through.

Customer language can improve headlines, navigation labels, product descriptions, FAQs, calls to action, onboarding instructions, and the sequence in which information appears. The goal is not to mimic every phrase. It is to understand the concepts and words that feel familiar to the people you serve.

Where to find useful language

- Customer emails, inquiry forms, and direct messages
- Sales, discovery, consultation, and onboarding conversations
- Support questions, cancellations, and return reasons
- Reviews and testimonials—especially the details before and after the purchase
- Search terms that lead people to your site or appear in site search
- Comments in relevant communities, social posts, or forums
- Reviews of competing or alternative solutions

Listen for patterns

Pay attention to repeated triggers, desired outcomes, questions, concerns, comparisons, and proof. A single colorful quote may be interesting; a recurring pattern is more useful for decision-making.

TWO-TRACK EXAMPLE

E-commerce: 'technical moisture-wicking textile' may become 'stays comfortable during long runs.' SaaS: 'automated workflow orchestration' may become 'route every request to the right person automatically.'

Do not manufacture a quote

If you do not yet have customer evidence, write your assumptions as assumptions. Do not turn what you hope customers think into quotation marks and call it research. Chapter 6 will help you collect and organize stronger evidence; for now, honesty about what you know is enough.

Simple Research You Can Do Now

You do not need a research department. You need a small, deliberate review of evidence you already have—or can gather responsibly.

1. Review ten recent customer conversations

Look through emails, forms, messages, sales notes, or support threads. Record the customer's trigger, goal, question, concern, and exact wording when useful.

2. Speak with three to five customers

Ask about the situation that led them to look, what they considered, what nearly stopped them, what information mattered, and what made them comfortable proceeding.

3. Mine reviews

Review your own feedback and relevant competitor reviews. Look for repeated expectations, disappointments, decision criteria, and language—not isolated feature requests.

4. Ask one focused on-site question

Use a short survey only when you know what you need to learn. Questions such as 'What information are you looking for today?' are more useful than a generic satisfaction score.

5. Review search behavior

Examine search queries, internal site searches, FAQ clicks, and pages people visit before converting. These clues can reveal what visitors need to understand.

A few boundaries

- ☐ Ask permission before recording a conversation.
- ☐ Remove unnecessary personal or sensitive information from your notes.
- ☐ Do not pressure customers to provide positive feedback.
- ☐ Do not treat friends who are not customers as a substitute for customer evidence.
- ☐ Separate what a person said from your interpretation of what it means.

START SMALL
One afternoon spent reviewing real customer language can be more valuable than another afternoon rewriting copy from memory.

Common Mistakes

Creating an elaborate fictional persona

A name, stock photo, favorite coffee, and imagined personality do not automatically help you improve the experience. Capture context that affects the decision: the trigger, task, questions, concerns, constraints, and needed evidence.

Treating yourself as the customer

Your knowledge changes what you notice. You already understand the offer, terminology, process, and reasons to trust the business. A new visitor does not receive that context automatically.

Listening only to happy customers

Testimonials reveal value and decision language, but support issues, abandoned sales, objections, cancellations, and negative reviews can reveal friction that enthusiastic customers worked around.

Trying to serve everyone on one page

If different customers arrive with very different situations, one generic message may serve none of them well. Start with the primary situation connected to the conversion journey you selected in Chapter 1.

Confusing requests with solutions

Customers may ask for a particular feature, page, or design change. The request is useful evidence, but first understand the need behind it. Several solutions may address the same underlying problem.

DO THIS NOW

Choose one primary customer situation. Write what you know, label what you are assuming, and identify one source you can review to strengthen the snapshot.

WORKSHEET

Customer Clarity Snapshot

Complete this for the conversion journey you selected in Chapter 1. Use real evidence when available. Mark uncertain answers with an asterisk so you know what to investigate.

Business track: ☐ **E-commerce** ☐ **SaaS**

SAMPLE ANSWERS

E-commerce: A first-time shopper needs running shoes before an upcoming race and worries about fit, delivery timing, and returns. • SaaS: A two-person agency has outgrown spreadsheets and needs to know whether setup is manageable without a technical employee.

1. Who is the primary customer for this journey?

_____

_____

2. What happened that caused them to look for help, information, or a solution now?

_____

_____

_____

3. What are they ultimately trying to accomplish—not merely click or buy?

_____

_____

_____

4. What constraints affect their decision?

☐ Time or urgency

☐ Budget

☐ Knowledge or experience

☐ Technical ability

☐ Approval from someone else

☐ Risk or uncertainty

☐ Other

Customer Clarity Snapshot — Continued

5. What questions must the experience answer?

1. _____

2. _____

3. _____

4. _____

6. What concerns might make this person hesitate or leave?

_____

_____

_____

_____

7. What evidence would help them feel confident?

☐ Clear explanation of the process

☐ Pricing or cost expectations

☐ Reviews or testimonials

☐ Examples or case studies

☐ Credentials or expertise

☐ Policies, guarantees, or security

☐ A clear next step

☐ Other

Customer Clarity Snapshot — Evidence

8. What words do customers use to describe the problem, desired outcome, or concern?

_____

_____

_____

_____

_____

_____

9. What evidence supports this snapshot?

☐ Customer email, form, or message

☐ Sales or consultation conversation

☐ Support conversation

☐ Review or testimonial

☐ Search behavior

☐ Survey or interview

☐ Competitor or alternative-solution reviews

☐ This is currently an assumption

10. What is the most important thing you still need to learn?

_____

_____

_____

_____

ONE-SENTENCE SUMMARY

[Customer] is trying to [desired progress] because [trigger]. Before taking [primary action], they need to understand [key questions] and feel confident about [main concerns].

_____

_____

Chapter 2 Completion Checkpoint

Before moving to Chapter 3, confirm that your snapshot describes a real decision context—not a fictional character profile.

- ☐ I selected one primary customer situation connected to my conversion goal.
- ☐ I documented what triggered the customer's search or visit.
- ☐ I described the progress the customer is trying to make.
- ☐ I listed the main questions and concerns that shape the decision.
- ☐ I identified the evidence that could increase confidence.
- ☐ I captured real customer language where it is available.
- ☐ I separated known evidence from assumptions.
- ☐ I identified one important question to investigate next.

YOUR CHAPTER 2 OUTPUT

One evidence-aware Customer Clarity Snapshot for the person and situation most important to the conversion journey you selected.

Up next: Map the Path to Conversion

In Chapter 3, you will trace how this customer enters the experience, what they need at each decision point, what can interrupt progress, and where the intended journey may differ from the path people actually take.

CHAPTER 3

Map the Path to Conversion

Your website is organized into pages. Your customer experiences it as a series of decisions.

Business owners often picture a clean path: the visitor lands on the homepage, reads the services page, reviews a testimonial, clicks the main button, and converts. Real journeys are usually less cooperative. People arrive through search results, shared links, ads, social posts, product pages, pricing pages, app screens, or bookmarked content. They skip steps, open several tabs, get interrupted, switch devices, return later, and sometimes begin in the middle.

A conversion path map helps you see the experience from the customer's position. It connects where the person arrives, what they need to understand, what they do next, what can create hesitation, and what helps them complete the journey.

WHY IT MATTERS

You cannot improve a path you have never clearly described. Mapping exposes missing information, unnecessary steps, conflicting calls to action, and assumptions about how visitors behave.

A journey is not a sitemap

A sitemap shows how pages or screens are organized. A conversion path shows how a particular customer moves toward a meaningful outcome. The map may include only part of the site—and it may include touchpoints outside the site, such as an email, calendar, payment service, app store, or third-party form.

Start with one customer and one conversion

Use the customer situation from Chapter 2 and the primary conversion from Chapter 1. Do not map every possible route at once. Your first map should answer one question: how could this customer reasonably move from arrival to the selected action?

The two tracks at a glance

Stage	E-commerce	SaaS
Discover	Homepage, collection, search, or product page	Landing page, use case, content, or pricing page

Evaluate	Product details, reviews, imagery, delivery and returns	Value, use case, proof, integrations, security, and plans
Commit	Cart and checkout	Signup, trial, demo request, or subscription
Reach value	Order confirmation, delivery, product use	Onboarding, activation, feature adoption
Continue	Repeat purchase, replenishment, loyalty	Upgrade, renewal, retention, expanded use

Start Where the Visitor Actually Arrives

The homepage is an important entry point. It is not the front door for everyone.

A shopper may enter through a product page from search, social media, or an ad. A SaaS evaluator may land directly on pricing or a use-case page; an existing user may return to onboarding, sign-in, or a product screen. The first page or screen shapes which questions need to be answered immediately.

Common entry points

- Search results leading to a service, product, article, or location page
- Paid ads leading to a campaign landing page
- Social posts or profile links
- Referral links from a partner, directory, article, or customer
- Email links, saved bookmarks, and return visits
- App notifications, deep links, and app-store listings
- Direct visits from someone who already knows the business

Arrival creates an expectation

The words and context that brought someone to the experience create a promise. If a search result says 'same-day consultation' but the landing page says nothing about availability, the person must work to confirm whether the page is relevant. If an ad promotes one product but leads to a general category page, the visitor must find the offer again.

THE SCENT OF INFORMATION

Visitors look for signs that they are still on the right path. Headlines, labels, imagery, pricing cues, product details, and calls to action should reinforce the expectation created before arrival.

Traffic source can change the journey

A referral may arrive with more trust than a first-time visitor from an unfamiliar ad. A returning customer may need less explanation than someone comparing alternatives. You do not need a separate experience for every source, but you should notice when different entry contexts create meaningfully different questions or confidence needs.

Map Decisions, Not Just Clicks

A click tells you that something happened. A decision point helps explain what the customer needed before it happened.

At each stage of the path, ask what the person is trying to determine. A visitor may need to decide whether the offer is relevant, whether the business is credible, which option fits, whether the price is reasonable, or whether the next step feels safe.

Stage	Customer decision	Experience support
Arrival	Am I in the right place?	Clear relevance and message match
Understanding	Does this solve my problem?	Specific value, scope, and outcomes
Evaluation	Is this credible and right for me?	Proof, details, comparisons, and expectations
Commitment	Is the next step worth the cost or risk?	Pricing, policies, reassurance, and a clear CTA
Completion	Can I finish successfully?	Usable forms, checkout, onboarding, and confirmation

Information belongs where the question appears

A detailed answer is not helpful if the customer cannot find it before making the related decision. Shipping information hidden after checkout, pricing revealed only after a long form, or compatibility details buried in support documentation can create avoidable uncertainty.

ASK AT EVERY STEP

What question is the customer trying to answer here, and does the experience provide the right information at the right time?

The Intended Path and the Actual Path

The path you designed is a hypothesis. Customer behavior shows how well that hypothesis holds up.

Begin by drawing the path you expect people to take. Then compare it with whatever evidence is available: analytics, navigation paths, form data, session recordings, customer interviews, sales conversations, usability testing, and support questions.

What the intended path might assume

- Visitors begin on the homepage.
- They understand the navigation labels.
- They read the information in the order presented.
- They notice the primary call to action.
- They already know which product or service they need.
- They are ready to complete the journey in one session.

What the actual path may reveal

- Visitors land on deeper pages and never see the homepage explanation.
- People move back and forth between pricing, proof, and service details.
- Important information is repeatedly searched for or requested from support.
- Visitors begin forms but return to other pages before submitting—or leave entirely.
- Mobile visitors encounter a different sequence or more friction than desktop visitors.
- Customers use an unexpected page as the main decision page.

When you have limited traffic

You may not have enough visits to identify stable path patterns in analytics. You can still map the intended path, test it with a few relevant people, review individual customer journeys, examine form and sales records, and ask customers what they needed before acting. Treat the result as directional evidence—not proof that every visitor behaves the same way.

MATCH THE METHOD TO THE EVIDENCE

More traffic can reveal recurring behavioral patterns. Less traffic calls for closer observation, customer feedback, and more cautious conclusions—not giving up.

Where Conversion Paths Break

A path can fail even when every individual page looks polished.

A missing answer

The customer reaches a decision point but cannot find the pricing, policy, compatibility, availability, process, or proof needed to continue.

A weak transition

The next step is unclear, unexpected, or disconnected from what came before. A button label may be vague, a form may appear without explanation, or the destination may not match the promise of the call to action.

Too many competing paths

Several equally prominent calls to action force the visitor to decide what the business wants them to do before they can decide what they want to do.

An unnecessary step

The journey asks for information, account creation, navigation, or confirmation that is not needed at that point. Each extra step creates another opportunity to stop.

A channel handoff

The customer leaves the primary experience for a scheduling platform, checkout provider, embedded form, app store, or email conversation. A change in design, domain, instructions, or expectations can weaken confidence or disrupt tracking.

A technical failure

Slow loading, validation errors, broken links, missing states, browser problems, inaccessible controls, and mobile layout issues can block an otherwise motivated customer.

IMPORTANT

Drop-off does not automatically identify the problem. It tells you where to investigate. The cause may involve acquisition, messaging, usability, the offer, confidence, technology—or several at once.

Mobile, Interruptions, and Returning Later

Many journeys do not happen in one sitting—or on one device.

A visitor may discover the business on a phone, compare options later on a laptop, ask someone else for input, and return through an email or direct search. An app user may be interrupted during onboarding. A shopper may leave to check measurements, availability, or a bank balance. Not every pause is a failure.

Review the mobile path independently

☐ Can the visitor understand the offer without excessive scrolling?

☐ Are navigation, filters, forms, and controls easy to use by touch?

☐ Do keyboards, overlays, sticky elements, or error messages block content?

☐ Can the user review important information without losing form progress?

☐ Are third-party steps usable and trustworthy on a smaller screen?

Support interrupted journeys

Where appropriate, preserve carts, form progress, saved items, account state, or recent activity. Make it easy to return through confirmation emails, reminders the user requested, clear account navigation, or a predictable page structure. Avoid using urgency or interruption recovery as an excuse for unwanted pressure.

Distinguish a pause from abandonment

A high-consideration service, expensive product, or complex signup may naturally require more time. Evaluate whether customers can resume successfully and whether the experience answers the questions that arise between visits.

THE PRACTICAL TEST

Start the journey on a phone. Stop midway. Return later—on the same device and, when relevant, another one. Notice what is remembered, what is lost, and what becomes confusing.

Common Mistakes

Mapping the ideal journey only

A map that ignores alternate entry points, backtracking, interruptions, and third-party steps may look tidy but will not help you investigate real friction.

Treating every exit as a failure

People leave for many reasons. They may have found what they needed, decided they were not a fit, switched devices, or planned to return. An exit becomes more meaningful when combined with the page purpose, customer intent, and other evidence.

Adding steps because they help the business

An extra field, account requirement, upsell, or confirmation may help internal operations while making the customer's task harder. Be explicit about the tradeoff and ask whether the information is truly needed at that stage.

Assuming more options create more freedom

Options help when customers understand the differences. Poorly differentiated choices increase decision effort and can make the next step less clear.

Trying to map every possible path

You are not documenting the entire internet. Map the primary path, then add only the alternate routes that materially change the customer's questions, confidence, or ability to complete the conversion.

Using the map as proof

Your map organizes what you know and what you assume. It does not prove why customers behave a certain way. Mark evidence gaps so later research can address them.

DO THIS NOW

Trace one current-state journey from a realistic entry point to the primary conversion. Mark each decision, hesitation, confidence builder, handoff, and evidence gap.

WORKSHEET

The Conversion Path Map

Map one current-state journey for the customer situation and conversion selected in Chapters 1–2. Describe what exists today—not the improved journey you hope to create.

Business track: ☐ E-commerce ☐ SaaS

SAMPLE PATHS

E-commerce: Google product result → product page → sizing guide → cart → shipping estimate → checkout → confirmation. • SaaS: Use-case landing page → pricing → trial signup → connect data → create first report → upgrade prompt.

1. Who is completing this journey, and what triggered it?

_____

_____

_____

_____

2. What is the primary conversion?

_____

_____

3. Where is this customer most likely to enter the experience?

☐ Homepage

☐ Collection or product page

☐ Pricing or plan page

☐ Use-case or content page

☐ Campaign landing page

☐ Onboarding or product screen

☐ Email or referral link

☐ Other

What expectation does that entry source create?

_____

_____

_____

The Conversion Path Map — Decision Stages

Use one row for each meaningful stage. Add or remove stages as needed.

Stage	Customer question	Action or next step	Possible hesitation
Arrival			
Understand			
Evaluate			
Commit			
Complete			

The Conversion Path Map — Handoffs and Continuity

4. Which stages involve another platform, person, or channel? What changes when the customer moves between them?

_____

_____

_____

_____

_____

_____

_____

5. Where could a mobile visitor or interrupted customer lose progress? What would help them return successfully?

_____

_____

_____

_____

_____

_____

_____

LOOK BEYOND THE PAGE

Include scheduling tools, payment providers, email, phone calls, app stores, account systems, and any other handoff that affects whether the journey can continue.

The Conversion Path Map — Confidence and Evidence

6. What helps the customer feel confident at each important decision?

1. _____

2. _____

3. _____

4. _____

7. Which step appears most vulnerable to friction or drop-off? Why?

_____

_____

_____

_____

_____

8. What evidence supports your map?

☐ Analytics or path data

☐ Form, checkout, or product data

☐ Session recordings

☐ Customer interviews or usability tests

☐ Sales or support conversations

☐ Direct observation

☐ This is currently an assumption

9. What do you still need to investigate?

_____

_____

_____

_____

Chapter 3 Completion Checkpoint

Before moving to Chapter 4, confirm that your map reflects the current experience and clearly identifies what you know versus what you assume.

- ☐ I mapped one customer situation and one primary conversion.
- ☐ I began at a realistic entry point—not automatically the homepage.
- ☐ I identified the customer's question at each decision stage.
- ☐ I documented the actions and transitions between stages.
- ☐ I marked possible hesitation, unnecessary steps, and channel handoffs.
- ☐ I considered mobile use, interruptions, and returning later.
- ☐ I recorded evidence supporting the map.
- ☐ I identified the most important evidence gap to investigate.

YOUR CHAPTER 3 OUTPUT

One current-state Conversion Path Map showing how a specific customer moves from a realistic entry point to the primary conversion—and where that journey may break down.

Up next: Establish Your Starting Point

In Chapter 4, you will establish a practical baseline, separate traffic problems from conversion problems, and choose measurement methods that fit the amount and quality of evidence available.

CHAPTER 4

Establish Your Starting Point

Before you improve anything, record enough of the current reality to recognize meaningful change.

It is difficult to evaluate an improvement when the starting point is 'I feel like the website is not working.' That feeling may be valid, but it does not tell you how many relevant people arrive, what they do, where progress slows, whether conversions are being recorded, or whether the resulting customers are a good fit.

A baseline is a dated snapshot of the evidence available before you make a change. It does not need to be sophisticated. It needs to be specific, honest about its limitations, and connected to the conversion journey you selected.

WHY IT MATTERS

Without a baseline, normal fluctuation can look like success, a meaningful improvement can go unnoticed, and a measurement failure can be mistaken for a customer-behavior problem.

A baseline is not a permanent benchmark

Seasonality, promotions, pricing, traffic sources, competition, product availability, economic conditions, and changes elsewhere in the business can all affect performance. Record the dates and context so later comparisons are fair enough to be useful.

Start with what you can reliably observe

Do not fill the worksheet with numbers merely because a dashboard displays them. First confirm what each metric means, where it comes from, and whether the important action is actually recorded.

THE OPERATING PRINCIPLE

A smaller amount of understandable evidence is more useful than a large dashboard you do not trust.

Traffic, Users, Sessions, and Visits

These terms describe activity—not automatically opportunity or success.

Analytics tools use slightly different definitions, but most distinguish between people or devices and the periods in which they interact with an experience. The exact terminology matters less than using one definition consistently.

Term	Plain-English meaning	What to remember
User or visitor	A person—or more accurately, the browser, device, or account used to identify one.	One person may appear as multiple users; several people may share one device.
Session or visit	A period of activity grouped together by the analytics system.	One user can have several sessions before converting.
Page or screen view	A recorded view of a page or app screen.	More views do not automatically mean more interest or value.
New versus returning	A tool's estimate of whether the user has been recognized before.	Consent, devices, browsers, and deleted cookies can affect the classification.

Use one unit consistently

If you calculate conversion rate using conversions divided by users, compare that result with another user-based rate. If you use sessions, remain session-based. Switching denominators can make a change appear larger or smaller even when customer behavior has not changed.

Traffic is not one undifferentiated crowd

People arrive with different intentions and levels of readiness. A returning customer checking an order, a job seeker, a support visitor, an accidental click, and a qualified prospect may all count as traffic. The number of visits matters, but the relevance of those visits matters just as much.

DO NOT BE DISCOURAGED

You do not need thousands of visitors before you can learn. Traffic volume determines which conclusions and methods are reasonable—not whether improvement is possible.

Which Problem Are You Looking At?

Low conversions can describe several very different situations.

Possible problem	What it can look like	What to investigate
Traffic volume	Too few relevant people reach the experience.	Visibility, reach, search demand, referrals, partnerships, and acquisition activity.
Traffic quality	Visits increase, but the people arriving have weak intent or poor fit.	Targeting, keywords, promises made before the click, source quality, and audience fit.
Conversion experience	Relevant people arrive but struggle to understand, trust, navigate, or complete the next step.	Messaging, usability, accessibility, confidence, friction, and technical reliability.
Offer or business	The experience works, but the value, price, availability, terms, or underlying offer is not compelling or competitive.	Customer need, positioning, price, product-market fit, delivery, and sales follow-up.
Measurement	Conversions happen but are missing, duplicated, misclassified, or disconnected across systems.	Tracking setup, consent, third-party tools, definitions, duplicate events, and data integration.

These categories can overlap. Poorly targeted advertising can send the wrong people to a confusing landing page with broken form tracking. The goal is not to force every situation into one box. It is to avoid treating redesign as the automatic answer.

A USEFUL DIAGNOSTIC QUESTION

Are too few relevant people arriving, are relevant people struggling after arrival, is the offer itself limiting action, or can we not reliably tell what happened?

Build a Practical Baseline

Begin with the primary conversion, then add only the supporting measurements needed to understand the path.

1. Select a baseline period

Choose a recent period long enough to include normal business activity. A week may be useful for a high-volume store; several months may be necessary for a newer SaaS business with relatively few trials or paid conversions. Avoid periods dominated by outages, unusual promotions, inventory problems, launches, holidays, or major business changes unless those conditions are what you need to study.

2. Record the primary outcome

Capture the conversion count and, when meaningful, the conversion rate. Also note quality: completed purchases that remain valid, activated users, qualified demos, retained subscriptions, or another indicator that the action produced value.

3. Record the opportunity

Note the relevant users or sessions that could reasonably complete the conversion. A site-wide conversion rate may be misleading if much of the traffic never enters the selected journey.

4. Add supporting behaviors

Include only a few signals that help locate progress or friction: product views, form starts, checkout starts, account creation, pricing-page visits, key-feature activation, or another action from the conversion path.

5. Add context

Record traffic sources, device categories, important entry pages, promotions, pricing changes, product availability, known technical issues, and measurement gaps. Context helps you avoid comparing unlike periods later.

KEEP IT PROPORTIONATE

A solo operator does not need a 40-metric executive dashboard. Start with one primary outcome, a few supporting behaviors, and the context required to interpret them.

Choose metrics for your track

Measurement layer	E-commerce examples	SaaS examples
Primary outcome	Purchases, conversion rate, revenue	Paid subscriptions, trial-to-paid rate, qualified demos
Progress	Product view, add to cart, checkout start	Signup, onboarding completion, activation
Value or quality	Average order value, retained orders, repeat purchase	Meaningful use, retention, expansion or upgrade
Context	Channel, device, product, promotion, stock	Channel, device, plan, acquisition motion, release

Metrics That Help—Without Becoming the Goal

A metric is useful when it helps you understand the customer's progress or a meaningful business result.

Conversion count

How many completed actions occurred? Counts are concrete and especially helpful when traffic is limited. Three purchases becoming six—or two activated trials becoming four—matters even when the rate remains noisy.

Conversion rate

What proportion of the selected users or sessions completed the action? State the formula and use it consistently. A rate can help compare periods or segments, but small denominators can create dramatic swings.

Step completion and drop-off

How many people reached and completed important stages? Form starts versus submissions, cart additions versus checkout starts, or account creation versus activation can help locate where to investigate.

Entry and exit pages

Where do people begin and end a session? These are clues, not verdicts. An exit from a confirmation page may be expected; an exit from a key form may deserve investigation.

Device and source differences

Large differences can reveal a usability issue, a mismatch in visitor intent, or a measurement problem. They do not prove the cause by themselves.

Conversion quality

Did the action lead to a qualified customer, retained order, useful trial, completed appointment, or meaningful product use? Optimizing only for quantity can create more spam, cancellations, returns, poor-fit leads, or low-value activity.

VANITY-METRIC WARNING

More page views, longer sessions, and lower bounce rates are not universally better. A customer who finds the answer quickly and converts may spend less time—not more.

When Traffic or Data Is Limited

The answer is not 'wait until you are bigger.' The answer is to change the method and narrow the claim.

Limited traffic means the number of relevant visitors and conversions is too small to separate the likely effect of a change from normal fluctuation within a reasonable period. There is no universal minimum. The threshold depends on conversion frequency, the size of the expected effect, the decision being made, and how much uncertainty you can tolerate. A high-volume store may evaluate a modest checkout change quantitatively; an early SaaS product with a handful of signups may learn more from activation records and observed onboarding sessions.

Use counts and individual outcomes

Track purchases, retained orders, signups, activations, demos, and paid subscriptions as actual counts. Percentages can still be recorded, but do not let a large-looking rate hide that it represents only one or two events.

Observe task completion

Ask a small number of relevant people to complete the journey while you observe. Note whether they understand the offer, find needed information, recognize the next step, recover from errors, and complete the task.

Use customer and operational evidence

- Customer interviews and short usability sessions
- Sales, consultation, support, cancellation, and return conversations
- Form-start and submission records
- Session recordings reviewed carefully and with appropriate privacy settings
- Search terms, internal searches, frequently visited help content, and recurring questions
- Before-and-after comprehension, task-success, and quality checks

Make a smaller claim

Instead of claiming 'this change increased conversion,' you may conclude that relevant participants found information more easily, fewer shoppers encountered a known checkout error, more trial users reached the first useful outcome, or the change appears promising and should be monitored.

LOW-TRAFFIC PRINCIPLE

Less data does not give you permission to guess. It asks you to combine closer observation with more cautious language.

When Analytics Are Missing or Unreliable

Do not postpone every improvement—but do document what you cannot currently measure.

Verify the primary action manually

Compare recorded analytics with actual form notifications, bookings, orders, CRM entries, accounts, or product records. If the systems disagree, treat the business record as an important reference and investigate the tracking gap.

Create a temporary manual baseline

For a defined period, record the date, source when known, action completed, quality or outcome, and any relevant notes. A simple log can establish a usable count while analytics are being repaired.

Test the journey directly

Complete the experience on common devices and browsers. Confirm that forms submit, confirmation messages appear, emails arrive, payments process, accounts activate, and third-party handoffs work.

Prioritize measurement repair

If the primary conversion is not recorded, duplicated, or disconnected from the business outcome, fixing measurement may be the highest-value optimization task. You do not need perfect tracking of every interaction, but the action you intend to improve should be observable.

Do not backfill certainty

If historical tracking was unreliable, do not present old numbers as precise. Mark the date reliable measurement begins and use that as the new baseline.

A RESPONSIBLE FALLBACK

When the dashboard cannot be trusted, use business records, direct testing, customer conversations, and a dated manual log. State clearly what each source can—and cannot—tell you.

Common Baseline Mistakes

Comparing unlike periods

A holiday promotion, product shortage, media mention, pricing change, or seasonal slowdown can make before-and-after results incomparable. Record context and choose the fairest period available.

Using the entire site as the denominator

If the selected conversion is relevant only to one service, product, location, or journey, site-wide traffic may dilute the rate and hide useful patterns.

Trusting default dashboard labels

A tool may label an action as a conversion or key event without confirming that it matches your primary business outcome. Know exactly what triggers the metric.

Ignoring missing consent or cross-device behavior

Privacy choices, browser restrictions, multiple devices, shared devices, and third-party systems can make analytics incomplete. That does not make the data useless; it means the numbers are estimates with boundaries.

Reacting to small swings

Moving from one conversion to two doubles the rate if traffic is unchanged, but it does not establish a reliable trend. Record the change, continue gathering evidence, and avoid declaring victory or failure too quickly.

Optimizing for the metric instead of the customer

A shorter form might increase submissions while reducing lead quality. A forced account might increase signups while increasing frustration and abandonment later. Review the downstream outcome.

DO THIS NOW

Create a dated baseline for one conversion journey. Include the primary outcome, opportunity, supporting behaviors, context, quality, and every known measurement limitation.

WORKSHEET

Optimization Baseline

Complete this before implementing an improvement. Use the most reliable source available and label estimates, missing information, and assumptions.

Business track: ☐ E-commerce ☐ SaaS

SAMPLE BASELINE

E-commerce: Over 30 days, 2,400 eligible sessions produced 48 purchases (2.0%), with 180 checkout starts and a 12% return rate. • SaaS: Over 60 days, 120 signups produced 42 activations and 12 paid subscriptions; paid conversion is still too infrequent for a confident short-term test.

1. What conversion journey are you measuring?

_____

_____

_____

2. What is the primary conversion?

_____

_____

3. What dates define the baseline period?

_____

_____

4. Why is this period reasonably representative?

_____

_____

_____

_____

5. Which source records the primary conversion?

☐ Analytics platform

☐ E-commerce or payment platform

☐ CRM or demo system

☐ Account or product data

☐ Subscription or billing platform

☐ Manual business record

☐ It is not currently recorded reliably

Optimization Baseline — Core Measurements

6. Record the current measurements. Leave a field blank rather than inventing a number.

Measurement	Current value	Source	Confidence
Relevant users or sessions			High / Med / Low
Primary conversion count			High / Med / Low
Primary conversion rate			High / Med / Low
Qualified or valuable conversions			High / Med / Low
Supporting action 1			High / Med / Low
Supporting action 2			High / Med / Low
Supporting action 3			High / Med / Low

7. State the conversion-rate formula used, if applicable:

_____

_____

_____

8. Which entry pages, devices, or traffic sources are most relevant to this journey?

_____

_____

_____

Optimization Baseline — Context and Limitations

9. What happened during the baseline period that could affect comparison?

☐ Promotion or campaign

☐ Pricing or offer change

☐ Seasonality or holiday

☐ Inventory or availability issue

☐ Technical problem or outage

☐ Traffic-source change

☐ Business or sales-process change

☐ Nothing unusual that I know of

☐ Other

Notes:

_____

_____

10. What measurement gaps or reliability concerns exist?

_____

_____

_____

11. If traffic is limited, which alternative evidence will you use?

☐ Absolute conversion counts

☐ Customer interviews

☐ Usability or task-completion sessions

☐ Sales or support conversations

☐ Manual business records

☐ Session recordings

☐ Form or funnel-step records

☐ Direct technical testing

Optimization Baseline — Summary

12. Which type of problem currently appears most likely?

☐ Traffic volume

☐ Traffic quality or relevance

☐ Conversion experience

☐ Offer or broader business

☐ Measurement

☐ A combination

☐ Not enough evidence yet

What evidence supports that assessment?

_____

_____

_____

_____

_____

13. Write your baseline summary in plain English:

SENTENCE STARTER

From [start date] to [end date], [relevant opportunity] produced [primary outcome]. The most important supporting behavior was [behavior]. The result should be interpreted with [context or limitation].

_____

_____

_____

_____

14. What is the next measurement or evidence gap you need to address?

_____

_____

Chapter 4 Completion Checkpoint

Before moving to Chapter 5, confirm that your baseline is understandable, dated, and honest about what the available evidence can support.

- ☐ I defined a baseline period and recorded its context.
- ☐ I recorded the primary conversion count and quality when available.
- ☐ I used a consistent definition of users, sessions, or visits.
- ☐ I selected only the supporting behaviors needed to understand the journey.
- ☐ I considered traffic volume and traffic quality separately.
- ☐ I checked whether the primary conversion is recorded reliably.
- ☐ I documented known measurement gaps and limitations.
- ☐ I selected alternative evidence when traffic or analytics are limited.
- ☐ I wrote a plain-English baseline summary.

YOUR CHAPTER 4 OUTPUT

One dated Optimization Baseline that records the current outcome, opportunity, context, quality, and evidence limitations for the selected conversion journey.

Up next: Walk Through the Experience Like a Customer

In Chapter 5, you will review the journey through clarity, relevance, navigation, friction, confidence, accessibility, and usability—without jumping immediately to solutions.

CHAPTER 5

Walk Through the Experience Like a Customer

A polished interface can still make an important task unnecessarily difficult.

A structured experience review helps you notice where clarity, relevance, navigation, confidence, accessibility, or basic usability may be weakening the journey. The goal is not to grade the design. It is to record observable friction from the customer's point of view.

WHY IT MATTERS

When you review through consistent lenses, you are less likely to confuse personal taste with a customer problem.

Clarity

Can a first-time visitor quickly understand what is offered, who it is for, why it matters, and what to do next? Replace cleverness with specific meaning when the two compete.

Relevance

Does the page deliver on the expectation created by the ad, search result, referral, or previous step? Message mismatch makes qualified traffic feel unqualified.

Navigation

Can people find the information and next step they need? Labels should use familiar language, and the primary path should not compete with a dozen equal choices.

Friction

What makes the task slower, harder, or more error-prone than necessary? Look for excessive fields, forced accounts, unclear requirements, poor error recovery, and needless steps.

Confidence

Does the experience provide proof, pricing, policies, security cues, expectations, and transparent terms at the moment they matter?

Accessibility and usability

Can people read the text, recognize controls, use a keyboard, understand labels and errors, and complete the task on a small screen? Accessibility is part of product quality, not a final decoration.

Apply the Review to Your Track

E-commerce application	SaaS application
Discovery: Can shoppers find and compare suitable products?	Acquisition: Does the landing page explain the use case and differentiated value?
Product decision: Are imagery, variants, price, availability, delivery, and returns clear?	Signup: Is the commitment proportionate, and are requirements explained?
Checkout: Can the shopper complete payment without surprises or avoidable demands?	Activation: Does onboarding lead to a first useful outcome rather than a product tour?
After purchase: Are confirmation, delivery expectations, and support clear?	Expansion: Can users understand limits, upgrades, billing, and continued value?

SHOPIFY EXAMPLE

Review the product template, cart, and checkout as one connected journey. A strong theme cannot compensate for missing delivery information or confusing variants.

Review discipline

☐ Use a private or incognito window so saved state does not hide the first-time experience.

☐ Review mobile and desktop separately.

☐ Complete the task; do not merely look at the page.

☐ Record what happened before proposing a fix.

☐ Mark whether each observation is direct evidence, customer evidence, or an assumption.

WORKSHEET

Customer-Eyes Experience Review

Business track: ☐ E-commerce ☐ SaaS

SAMPLE OBSERVATION

Observed: Shipping cost is not visible until checkout. Why it may matter: first-time shoppers cannot evaluate the total commitment on the product page. Evidence: repeated support questions plus three recordings showing returns from checkout to the product page. Severity: medium-high.

Journey and device reviewed:

_____

_____

Lens	What I observed	Why it may matter	Evidence / severity
Clarity			
Relevance			
Navigation			
Friction			
Confidence			
Accessibility			

CHAPTER 5 OUTPUT

An observation-first inventory of potential friction across one conversion journey.

CHAPTER 6

Listen to What People Do—and Say

Analytics shows where behavior occurred. It rarely explains the full reason.

Combine behavioral evidence with customer language. Session recordings, funnel steps, searches, support questions, reviews, cancellations, interviews, and short surveys each reveal a different part of the experience.

WHY IT MATTERS

A recurring pattern across two imperfect sources is often more useful than a confident story built from one dashboard number.

Use each source for what it can tell you

Analytics and funnel data

Useful for volume, sequence, segments, and recurring drop-off. Not proof of motivation or intent.

Session recordings

Useful for observing hesitation, repeated attempts, errors, and paths. Review a purposeful sample; protect privacy; do not treat cursor movement as a mind-reading device.

Heatmaps

Useful for broad interaction patterns on sufficiently viewed pages. They can be distorted by device mix, dynamic layouts, and low sample sizes.

Interviews and usability sessions

Useful for questions, expectations, comprehension, and task behavior. Ask about real recent experiences instead of hypothetical preferences.

Support, sales, returns, and cancellations

Useful for repeated confusion, objections, broken expectations, and downstream quality.

Questions That Produce Useful Evidence

- What were you trying to accomplish when you arrived?
- What information was hardest to find or understand?
- What nearly stopped you?
- What alternatives did you consider?
- What made you confident enough to continue?
- What happened after you purchased, signed up, or started the trial?

E-commerce application	SaaS application
Review product searches with no results, return reasons, delivery questions, checkout errors, and reviews.	Review signup errors, onboarding exits, unused trials, cancellation reasons, support tickets, and activation paths.
Ask recent buyers what they needed to verify before purchasing and what almost stopped them.	Ask activated and non-activated users what outcome they expected and where progress became unclear.

When traffic is limited

Inspect individual journeys, speak with a small number of relevant customers, and test task completion. Do not convert five observations into a market percentage. Describe the pattern, its source, and the confidence you have in it.

WORKSHEET

Evidence Log

SAMPLE ENTRY

Observation: Trial users repeatedly leave during data connection. Source: onboarding recordings and support tickets. Frequency: 8 of 20 reviewed sessions plus 6 tickets. Possible impact: prevents activation. Confidence: medium-high.

Observation	Source	Frequency	Possible impact	Confidence

Which pattern appears in at least two sources?

_____

_____

_____

_____

_____

CHAPTER 6 OUTPUT

An evidence log with recurring patterns from at least two sources.

CHAPTER 7

Diagnose Before You Redesign

A symptom tells you what happened. A diagnosis explains the problem well enough to act responsibly.

Low conversion, checkout abandonment, unused trials, and pricing-page exits are symptoms. Each can have several plausible explanations involving acquisition, message, usability, confidence, the offer, technology, or measurement.

WHY IT MATTERS
If you choose the cause that is easiest to redesign, you may improve the wrong thing beautifully.

Move from symptom to supported problem

1. State what is happening without explaining it.
2. Locate where and for whom it occurs.
3. List plausible explanations from different categories.
4. Compare explanations with available evidence.
5. Identify what remains unknown and how you could learn it.
6. Define the user and business outcome affected.

Two Diagnostic Examples

E-commerce application	SaaS application
Symptom: shoppers leave after viewing shipping in the cart.	Symptom: many users sign up but few activate.
Possible causes: cost is unacceptable; cost appears too late; timing is unclear; the cart is being used as a price calculator; tracking is wrong.	Possible causes: weak-fit acquisition; unclear first outcome; setup burden; missing data or integration; product error; activation event is poorly defined.
Useful evidence: cart-to-checkout steps, shipping questions, recordings, interviews, order geography, and competitor expectations.	Useful evidence: cohort paths, onboarding sessions, support, interviews with activated and non-activated users, and technical logs.

Know what design cannot fix alone

A page cannot manufacture demand, repair an uncompetitive offer, restore unavailable inventory, make a missing product capability real, or correct poor sales follow-up. The digital experience may clarify or expose those issues, but the solution may belong elsewhere in the business.

DIAGNOSTIC STANDARD

Write the problem so another person can see what is happening, who is affected, where it occurs, what evidence supports it, and what remains uncertain.

WORKSHEET

Problem Definition Canvas

SAMPLE PROBLEM DEFINITION

New SaaS trial users are leaving during data connection before activation. The pattern appears in recordings, event data, and support questions. Setup complexity and unclear permission requests are plausible causes; interviews with non-activated users are still needed.

What is happening?

_____

_____

_____

Where in the journey is it happening?

_____

_____

Who appears affected?

_____

_____

What evidence supports it?

_____

_____

_____

_____

What are at least three plausible explanations?

_____

_____

_____

_____

_____

What information would distinguish among them?

_____

_____

_____

Which user and business outcome is affected?

_____

_____

_____

CHAPTER 7 OUTPUT

One clearly defined, evidence-aware problem—not a redesign request disguised as a diagnosis.

CHAPTER 8

Turn Problems Into Better Ideas

A useful improvement idea begins with evidence and ends with something observable.

Once a problem is defined, generate more than one possible response. The first idea is often the most familiar—not necessarily the most effective, feasible, or respectful of the customer.

WHY IT MATTERS

Connecting each idea to a diagnosed problem prevents a collection of fashionable tactics from becoming your roadmap.

Write a simple hypothesis

HYPOTHESIS FORMAT

Because we observed [evidence-backed problem], we believe changing [part of the experience] will help [audience] accomplish [desired action], resulting in [measurable outcome].

Separate the change from the outcome

'Add reviews above the fold' is a change. 'Help first-time shoppers assess product credibility before adding to cart' is the intended user benefit. 'Increase qualified add-to-cart activity without increasing returns' is a measurable outcome. Keep all three visible.

Generate Alternatives

E-commerce application	SaaS application
Problem: shoppers cannot judge product fit. Ideas: clearer sizing guidance, comparison imagery, customer photos, fit filters, or a pre-purchase question tool.	Problem: users do not reach first value. Ideas: outcome-based setup, sample data, a guided checklist, fewer required steps, or human-assisted onboarding.
Problem: shipping surprises appear late. Ideas: earlier estimates, a delivery explainer, threshold messaging, or product-page availability by location.	Problem: plans are hard to compare. Ideas: use-case guidance, clearer limits, a recommendation prompt, cost examples, or a better upgrade explanation.

Use best practices carefully

A best practice is a candidate, not proof. Competitor designs can widen your option set, but they do not reveal whether the same change fits your customers, offer, technology, or traffic. Use outside examples as inspiration and your evidence as the decision standard.

Consider risks

An improvement can create downstream harm: more purchases but more returns, more signups but fewer activated users, a shorter form but worse lead quality, or more urgency but less trust. Name the risk before implementation.

WORKSHEET

Improvement Idea Builder

SAMPLE HYPOTHESIS

Because shoppers cannot judge fit confidently, we believe adding product-specific sizing guidance beside variant selection will help first-time shoppers choose accurately, increasing retained purchases without increasing returns.

Observed problem and evidence

_____

_____

_____

_____

Proposed change

_____

_____

_____

Expected user benefit

_____

_____

_____

Expected business benefit

_____

_____

_____

How success will be observed

_____

_____

_____

Possible risks or unintended effects

_____

_____

_____

Two alternative solutions

_____

_____

_____

_____

CHAPTER 8 OUTPUT

Three to five evidence-informed ideas, each connected to a defined problem and measurable outcome.

CHAPTER 9

Prioritize What Matters Most

Not every real problem deserves attention now.

A useful backlog contains more ideas than you can implement. Prioritization helps you choose work with meaningful user and business impact, supported by credible evidence, at an effort and risk level the business can absorb.

WHY IT MATTERS

Without prioritization, easy cosmetic changes crowd out foundational work—or a full redesign begins before the highest-value problem is understood.

Score four dimensions

Impact

How much could this improve the selected user or business outcome?

Confidence

How strong and varied is the supporting evidence?

Effort

How much time, money, technical work, coordination, and ongoing maintenance are required?

Risk and dependency

What could break, and what other systems, teams, data, inventory, or product work must be ready?

A simple priority score

Use 1–5 ratings. A practical starting formula is (Impact × Confidence) ÷ Effort. Treat the number as a conversation aid, not mathematics that removes judgment. Record dependencies and risk beside the score.

Quick Wins and Foundations

E-commerce application	SaaS application
Quick win: clarify a known delivery question on high-traffic product pages.	Quick win: explain the first useful outcome before signup.
Foundation: repair product data, mobile filtering, checkout tracking, or a misleading returns process.	Foundation: define activation, repair event tracking, simplify onboarding architecture, or address a missing integration.

When a redesign may be justified

- The underlying information architecture blocks important journeys.
- The platform cannot support necessary accessibility, performance, measurement, or product requirements.
- Several high-impact problems share a structural cause.
- The offer or product has changed so substantially that the current experience misrepresents it.
- Incremental repairs would cost more or create more risk than planned replacement.

DO NOT USE THE SCORE BLINDLY

A legal, accessibility, security, payment, or severe usability failure may need immediate attention even when its numerical priority appears modest.

WORKSHEET

Optimization Priority Scorecard

SAMPLE SCORE

Clarify delivery timing on the product page: Impact 4, Confidence 4, Effort 1. Priority score = 16. Dependency: accurate location-based delivery estimates. Risk: promising a date fulfillment cannot meet.

Improvement	Impact	Confidence	Effort	Score	Risk / dependency

The first one to three improvements I will pursue:

_____

_____

_____

_____

_____

CHAPTER 9 OUTPUT

A ranked backlog and a deliberate first priority.

CHAPTER 10

Make the Smallest Meaningful Change

Change enough to address the problem, but not so much that learning disappears.

A controlled change has a defined problem, intended audience, expected outcome, measurement plan, implementation boundary, and review date. Small does not mean trivial; meaningful does not require rebuilding everything.

WHY IT MATTERS

When several unrelated changes launch together, you may improve the experience without knowing what helped—or introduce harm you cannot isolate.

Prepare the change

- ☐ Capture the current experience with screenshots, copy, configuration, and date.
- ☐ Confirm the change directly addresses the selected problem.
- ☐ Define the primary and guardrail measurements.
- ☐ Preserve or update tracking deliberately.
- ☐ Review mobile, accessibility, performance, error states, and integrations.
- ☐ Decide who can reverse or repair the change if needed.

Implementation by Track

E-commerce application	SaaS application
Typical scope: product copy, imagery, collection filters, merchandising, offer presentation, cart, or theme behavior.	Typical scope: landing copy, pricing, signup, onboarding, lifecycle messages, or an activation step.
QA: variants, discounts, inventory, tax, shipping, payment, confirmation, analytics, and mobile checkout.	QA: authentication, permissions, integrations, empty/error states, billing, product events, and mobile or responsive use.
Guardrails: returns, cancellations, support contacts, margin, and average order value.	Guardrails: support load, activation quality, cancellations, retention, and unwanted low-fit signups.

When professional help is sensible

Bring in qualified design, development, analytics, accessibility, legal, or security support when the change crosses your expertise, handles sensitive information, affects payment or authentication, creates substantial revenue risk, or cannot be tested and reversed safely.

RELEASE PRINCIPLE

A fast change is not a controlled change unless you know what changed, why, how it will be checked, and what would trigger reversal.

WORKSHEET

Change Brief

SAMPLE BRIEF

Change: Replace the generic onboarding tour with a three-step setup checklist. Intended outcome: more new users connect data and create a first report. Guardrails: support contacts and setup errors. Review after enough eligible signups—or after four weeks using task completion and interviews if volume remains limited.

What is changing—and what is explicitly out of scope?

_____

_____

_____

_____

Which problem and evidence support it?

_____

_____

_____

Who should benefit, and how?

_____

_____

_____

Primary outcome and guardrail measurements

_____

_____

_____

Implementation and QA requirements

_____

_____

_____

_____

What could go wrong?

_____

_____

_____

Launch date, review date, and reversal condition

_____

_____

_____

CHAPTER 10 OUTPUT

One documented, quality-checked improvement ready to launch.

CHAPTER 11

Measure Without Fooling Yourself

A result is useful only when you describe what the evidence can actually support.

Compare the review period with the baseline, but account for traffic mix, seasonality, campaigns, product availability, releases, pricing, and measurement changes. Look at the primary outcome, supporting behavior, conversion quality, and unintended effects together.

WHY IT MATTERS

The purpose of evaluation is to make the next decision better—not to prove that every idea was a win.

Possible decisions

Keep

Evidence suggests the change is helpful and no important guardrail worsened.

Revise

The idea appears directionally useful but execution or scope needs adjustment.

Reverse

The outcome or a guardrail worsened enough to restore the previous experience.

Investigate

The result exposes a new question or measurement problem.

Continue monitoring

The evidence is promising or neutral but not yet stable.

Inconclusive

The available evidence cannot distinguish effect from normal variation.

Choose an Evaluation Method That Fits

Higher-volume conditions

A controlled A/B test may be appropriate when enough eligible traffic and conversions can reach both versions, assignment is reliable, the outcome is defined in advance, and the test can run without disruptive overlap. Estimate feasibility before building the test; do not stop only when the graph looks favorable.

Lower-volume conditions

Use before-and-after counts with context, task-success observation, comprehension checks, customer feedback, quality measures, support patterns, and direct verification of a known defect. Keep the claim narrow. A clearer experience observed by five relevant participants is useful evidence; it is not proof of a population-wide conversion lift.

E-commerce application	SaaS application
Check purchases, conversion rate, revenue, order value, checkout completion, returns, cancellations, and support contacts.	Check signup, activation, trial-to-paid, qualified demos, retention, subscription value, cancellations, and support burden.

Avoid common interpretation traps

- Treating correlation as proof of causation.
- Ignoring a traffic-source or offer change.
- Reporting a rate without the count behind it.
- Celebrating acquisition while downstream quality falls.
- Changing the success metric after seeing the result.
- Calling an inconclusive result a failure.

WORKSHEET

Optimization Results Review

SAMPLE CONCLUSION

Promising, not proven: 9 of 12 observed users completed the revised setup versus 5 of 12 previously, and permission-related questions declined. Signup volume is too low to claim a reliable conversion lift, so keep the change and monitor activation quality.

Baseline period and review period

_____

_____

What changed, and when?

_____

_____

_____

Primary outcome: count, rate, and source

_____

_____

_____

Supporting behaviors and guardrails

_____

_____

_____

_____

Traffic, campaign, product, or measurement context

_____

_____

_____

_____

Customer or behavioral evidence

_____

_____

_____

_____

Confidence and limitations

_____

_____

_____

Decision: keep, revise, reverse, investigate, monitor, or inconclusive

_____

_____

_____

CHAPTER 11 OUTPUT

A proportionate evaluation and a documented next decision.

CHAPTER 12

Build Your Optimization Habit

Optimization works best as a calm operating rhythm—not permanent tinkering.

A lightweight monthly practice helps you review performance, collect evidence, maintain a backlog, select one meaningful priority, implement carefully, and record what you learned. The rhythm should fit the pace and risk of your business.

WHY IT MATTERS

Without a review cadence, evidence gets lost, old ideas regain urgency without context, and the website or product changes according to whoever spoke most recently.

A monthly rhythm

1. Review the primary outcomes and guardrails.
2. Gather customer, behavioral, operational, and technical evidence.
3. Update problem definitions and the improvement backlog.
4. Select one priority that fits current capacity.
5. Prepare, implement, and quality-check the change.
6. Evaluate prior changes and record the decision.
7. Share or store what was learned.

Adapt the Rhythm to Your Business

E-commerce application	SaaS application
Review promotions, traffic sources, product performance, stock, returns, checkout health, and customer questions.	Review acquisition cohorts, activation, usage, support, releases, retention, and billing behavior.
Coordinate optimization with merchandising and campaign calendars so normal commercial changes are documented.	Coordinate optimization with product releases so landing, signup, onboarding, and measurement remain aligned.

Avoid constant tinkering

Not every weekly fluctuation deserves a response. Keep a parking lot for unverified ideas, bundle measurement repair deliberately, and define quiet periods when a change needs time to produce interpretable evidence.

Know when to optimize, rebuild, or ask for help

Optimize when the core journey works but specific evidence-backed problems can be improved. Rebuild when structural limits make important outcomes unsafe, inaccessible, unmeasurable, or impractical. Ask for expert help when diagnosis, implementation, or risk exceeds your capacity.

WORKSHEET

Monthly Optimization Planner

SAMPLE MONTHLY PRIORITY

Evidence: mobile checkout errors increased after a payment update. Priority: repair and directly test the payment flow before changing copy or merchandising. Leave the product-page redesign in the backlog until checkout reliability is restored.

What changed in the business, traffic, product, or market?

_____

_____

_____

What is performing well?

_____

_____

_____

Where is friction appearing, and what evidence supports it?

_____

_____

_____

_____

What did the last change teach us?

_____

_____

_____

What is the next priority—and why now?

_____

_____

_____

What will we deliberately leave unchanged?

_____

_____

Implementation date and results-review date

_____

_____

CHAPTER 12 OUTPUT

A repeatable optimization cadence with one deliberate next priority.

Your First 30-Day Optimization Plan

Use this plan to turn the guide into one completed learning cycle.

Week 1 • Define

☐ Choose the e-commerce or SaaS track and one primary conversion.

☐ Complete the Customer Clarity Snapshot.

☐ Map the current conversion path.

☐ Establish the baseline and note traffic limitations.

Week 2 • Investigate

☐ Complete the Customer-Eyes Experience Review.

☐ Gather behavioral, customer, operational, and technical evidence.

☐ Record patterns in the Evidence Log.

☐ Define the most important problem.

Week 3 • Decide

☐ Generate several improvement ideas.

☐ Score impact, confidence, effort, risk, and dependencies.

☐ Select one meaningful priority.

☐ Complete the Change Brief.

Week 4 • Improve and learn

☐ Implement and quality-check the change.

☐ Confirm measurement and guardrails.

☐ Launch or begin observation.

☐ Schedule the Results Review for an appropriate date.

WORKSHEET

My 30-Day Optimization Roadmap

SAMPLE ROADMAP FOCUS

Track: SaaS. Conversion: activated trial. Problem: new users do not understand the data-connection requirement. Improvement: explain permissions before signup and simplify the connection step. Learning goal: determine whether comprehension and task completion improve, even if paid conversions remain too infrequent to judge.

Track and primary conversion

_____

_____

Customer and journey

_____

_____

_____

Baseline and limitations

_____

_____

_____

Most important evidence-backed problem

_____

_____

_____

_____

Selected improvement and expected outcome

_____

_____

_____

_____

Implementation date, review date, and decision owner

_____

_____

_____

What I want to learn—even if the metric does not improve

_____

_____

_____

Quick-Reference Optimization Checklist

Goal

☐ One primary conversion is defined.

☐ Supporting actions are not confused with the business outcome.

Customer

☐ The situation, trigger, questions, concerns, and needed proof are documented.

☐ Assumptions are labeled.

Journey

☐ The map begins at a realistic entry point.

☐ Mobile, interruptions, handoffs, and activation or fulfillment are included.

Evidence

☐ Traffic definitions and baseline dates are consistent.

☐ At least two evidence sources support the problem.

☐ Low traffic is handled with closer observation and narrower claims.

Change

☐ The priority connects to a diagnosed problem.

☐ Tracking, accessibility, mobile, error states, and guardrails are checked.

Learning

☐ The result is evaluated honestly.

☐ The next decision and lesson are recorded.

Plain-English Glossary

Activation: The point at which a SaaS user first experiences a meaningful product outcome.

Average order value (AOV): Revenue divided by the number of orders for a defined period.

Baseline: A dated snapshot used as the starting point for comparison.

Call to action: A prompt or control that communicates a next step.

Conversion: A completed action that matters to the business and user journey.

Conversion rate: Conversions divided by a defined opportunity, usually eligible users or sessions.

Drop-off: A decrease between stages; a location to investigate, not a cause by itself.

Friction: Anything that makes a task unnecessarily difficult, unclear, risky, or slow.

Guardrail metric: A measure checked to ensure an improvement does not create important harm elsewhere.

Hypothesis: A testable explanation connecting a problem, proposed change, audience, and outcome.

Qualitative evidence: Evidence about meaning, experience, language, or behavior, such as interviews and observations.

Quantitative evidence: Numeric evidence about counts, rates, sequences, or differences.

Retention: The continued use, purchase, or subscription behavior that indicates ongoing value.

Session or visit: A period of activity grouped by an analytics system.

Traffic quality: How relevant and appropriately motivated arriving visitors are for the selected journey.

Usability: How effectively and efficiently people can complete a task with the experience.

When to Bring in Professional Help

Self-guided optimization has limits. Seeking help is a risk decision, not an admission of failure.

- ☐ The primary conversion is missing, duplicated, or disconnected across systems.
- ☐ Payment, authentication, privacy, security, accessibility, or sensitive customer data is involved.
- ☐ The journey spans several platforms and failures cannot be isolated.
- ☐ A high-revenue experience could be harmed by an uncontrolled change.
- ☐ A major redesign, migration, or product repositioning is being considered.
- ☐ Traffic or customer behavior is substantial, but the team cannot explain persistent friction.
- ☐ Implementation requires design, development, research, analytics, or statistical expertise you do not have.

Prepare before you ask

Bring the conversion goal, customer snapshot, path map, baseline, evidence log, problem definition, and known constraints. Good professional support will still challenge your assumptions, but this preparation makes the engagement faster and more useful.

FINAL PRINCIPLE

You do not need to rebuild everything. Understand what is happening, improve the right thing, protect the customer experience, and learn from the result.