

marketingsherpa

marketingexperiments

web optimization summit 2014

subscription

Managing Optimization

How a subscription company applies the conversion heuristic throughout the customer journey

Jacob Baldwin

Digital Marketing Manager

One Call Now

Taylor Kennedy

Senior Research Manager

MECLABS

Session speaker



@JacoBaldwin

Jacob Baldwin
Digital Marketing Manager
One Call Now

Jacob Baldwin is the Digital Marketing Manager for America's largest group messaging service, One Call Now. During his time there, Baldwin has pioneered such endeavors as creating the digital marketing testing and optimization program, the persona-based content marketing program and its marketing automation systems. He has contributed to many notable publications such as *Inc.*, *Website Magazine*, Dell's TechPageOne Blog and MarketingSherpa.

About One Call Now

- 11 years old
- SaaS provider of group messaging services for multiple markets:
 - Business/enterprise
 - Education
 - Nonprofit organizations
- Subscription-based service



I'm going to tell you what I am going to tell you

Optimizing
for the click

Optimizing the
conversion experience

Optimizing
for the post-
conversion

#WebOpt14

web optimization
summit 2014



Opt Summit 2013



818-514-0800
www.onell.com
10000 E. 15th Ave
Denver, CO 80232

Journey Up the Funnel: Applying the heuristic


$$C=4m+3v+2(i-f)-2a$$



Journey Up the Funnel: Applying the heuristic

$$C=4m+3v+2(i-f)-2a$$

It's not an equation, it's a framework.



Pricing page, request for
quote page

Part 1: Optimizing for the click

Optimizing
for the click

Optimizing
for the post-
conversion

Optimizing the
conversion experience

Experiment 1: Background



Experiment ID: OCN REL Pricing Page
Location: OneCallNow.com/religious/pricing
Test Protocol: TP0005

Research Notes:

Background: Number of conversions on this page have been declining for a while.

Objective: To increase the number of conversions initiated on this page.

Primary Research Question: Which version of the REL product pricing page will inspire a greater number of conversion initiations?

Test Design: Sequential

Experiment 1: Pricing page control

Features

Pricing information

Testimonial

Accounts compared

One Call Now
where messages matter

Home » Religion » Pricing

Small Churches Medium Churches Large Churches Synagogues Religious Org. Other

Pricing

Religious Pricing and Quote Request

Religious Product Pricing
Not sure which plan is right for you? Is your group list larger than 500 numbers? Call toll free 877.686.3262, or click here to request a quote.

1 Month subscription
100,000 Subpages for message distribution
Unlimited Message Deliveries to member phone numbers

50 to 500 Phone numbers in member folder
120 Maximum seconds per message

Need a Larger or Annual Plan? [REQUEST A QUOTE](#)

phone numbers in your calling list	other plans monthly pricing	sign up	gold plans monthly pricing	sign up
50 numbers	\$15.00	sign up	\$22.00	sign up
75 numbers	\$23.00	sign up	\$34.00	sign up
100 numbers	\$33.00	sign up	\$44.00	sign up
120 numbers	\$43.00	sign up	\$54.00	sign up
150 numbers	\$53.00	sign up	\$64.00	sign up
200 numbers	\$63.00	sign up	\$74.00	sign up
250 numbers	\$73.00	sign up	\$84.00	sign up
300 numbers	\$83.00	sign up	\$94.00	sign up
400 numbers	\$93.00	sign up	\$104.00	sign up
500 numbers	\$93.00	sign up	\$104.00	sign up

	Silver Call from SILVER	Gold Call from GOLD	Comparing Services
Save 50% when you sign up for 1 year - you get one year months of service for FREE!	Yes	Yes	Yes
All two minutes of recording time	Yes	Yes	Yes
Text messages: Send unlimited text text messages to your congregation. 17% of youth love to text!	Yes	Yes	Yes
Family free real people friendly help and support (24/7/365)	Yes	Yes	Yes
Need help finding notes? We'll do it for you or walk you through it!	Yes	Yes	Yes
Family Profile - Simple web entry allows families to add additional phone numbers and email addresses anytime automatically!	Yes	Yes	Yes
Addressable Messaging - Send voice, text &/or email messages at once.	Yes	Yes	Yes
Text to Speech - Typed text is converted to speech - a text you to send call anytime!	Yes	Yes	Yes
Email Messaging - Send unlimited emails as well as voice messages to anyone on your roster.	Yes	Yes	Yes
Auto charged to Credit Card or Checking account	Yes	Yes	Yes
Your name and number in Caller ID - Members will know it's your important call.	Yes	Yes	Yes
Easily create Subpages to tailor messages to reach specific groups - youth, teens, teens, committees	Yes	Yes	Yes
Members - Quickly assign users who can send messages to one or more Subpages.	Yes	Yes	Yes
Group Rolling - Let people vote or respond with touch tone key to survey or answer questions.	Yes	Yes	Yes
Unlimited Features - We keep adding busy & not answer! members will your phone and time and even continue trying messages to reach everyone.	Yes	Yes	Yes
10,000+ HDMP - Back Banner - Your members can go to your website and "text" to hear your latest message.	Yes	Yes	Yes
Audio Library - Pre-record your favorite messages to be sent at anytime.	Yes	Yes	Yes
Messages start immediately with no dead air that counts like the answering call.	Yes	Yes	Yes
Message introduction - Consistently introduce every church message (can be turned off if desired).	Yes	Yes	Yes
Call recording - Includes message delivery online or by phone during message recording.	Yes	Yes	Yes
Call from Call Number - Call or toll free number and enter your phone number to hear the latest message.	Yes	Yes	Yes
Call from Number access - One toll free number to place and receive calls from anywhere.	Yes	Yes	Yes

Experiment 1: Pricing page treatment

One Call Now
when messages matter

Search [] GO Contact Us LOG IN SEND A MESSAGE

Home > Religious > Pricing Pricing

Overview Small Churches Medium Churches Large Churches Synagogues Religious Orgs Other

Pricing

Religious Pricing and Quote Request

Special Pricing for Churches, Other Religious Organizations and Non-Profits.
For Business or Education pricing requests, please click here.

One Call Now Standard Plan for Churches

Our Standard Plan for churches, synagogues, religious organizations, and non-profits has all the popular features you'll need to make the most out of communicating with your members.

- Voice (phone)
- Text
- Email
- Subgroups
- Group Polling
- Full 2 min. Recording Time

Plus, you'll get One Call Now's personalized attention from people who understand the needs of churches and other organizations. For a complete list of capabilities, please visit our [Features Page](#).

Sample Plans

phone numbers in your calling list	Monthly Pricing	Sign Up Now!
> 50 numbers	\$22.90	sign up >>
> 75 numbers	\$34.90	sign up >>
> 100 numbers	\$44.90	sign up >>
> 150 numbers	\$54.90	sign up >>

These are some of our most popular plans. Don't see one that fits your organization? Contact us for a plan just for you!

Testimonial

FAITH WESLEYAN CHURCH

"I want to thank you for this wonderful service. We have been with One Call Now since February with a 1000 call subscription. I recently added another 1000 call as we..."

Yvonne R.
Faith Wesleyan Church
view more

Need a Larger or Annual Plan?

REQUEST A QUOTE

Or please call us toll-free or email us. We'll be happy to customize a plan for you.

Plus, you can save an **ADDITIONAL 10% OFF** with a One Call Now Annual Plan.

877-698-3262
Email Us

Features

Accounts and pricing compared

Experiment 1: Side by side

One Call Now
when messages matter

Home > Religious > Pricing

Overview Small Churches Medium Churches Large Churches Synagogues Religious Orgs Other

Pricing

Religious Pricing and Quote Request

Religious Product Pricing

1 Month Subscription
\$99.99 Subscriptions for message delivery
Unlimited Message Deliveries to member phone numbers

50 to 500 Phone numbers in member State
120 Maximum seconds per message

Need a Larger or Annual Plan? **REQUEST A QUOTE**

Phone numbers in your calling list	silver plans monthly pricing	sign up	gold plans monthly pricing	sign up
> 50 numbers	\$13.99	sign up »	\$22.99	sign up »
> 75 numbers	\$23.99	sign up »	\$34.99	sign up »
> 100 numbers	\$33.99	sign up »	\$44.99	sign up »
> 120 numbers	\$43.99	sign up »	\$54.99	sign up »
> 200 numbers	\$73.99	sign up »	\$84.99	sign up »
> 250 numbers	\$93.99	sign up »	\$114.99	sign up »
> 300 numbers	\$113.99	sign up »	\$134.99	sign up »
> 400 numbers	\$163.99	sign up »	\$184.99	sign up »
> 500 numbers	\$213.99	sign up »	\$234.99	sign up »

	One Call Now (50-500)	One Call Now (500-5000)	Competing Services
Save 50% when you sign up for 1 year - you get over one month of service for FREE!	Yes	Yes	No
All free minutes of recording time.	Yes	Yes	No
Text messaging - Text content but not messages to your congregation. 75% of youth text to text!	Yes	Yes	No
Totally free-our people friendly help and support 24/7/365	Yes	Yes	No
Need help finding users? We'll do it for you or walk you through it.	Yes	Yes	No
Family Profile - Single web entry allows families to add additional phone numbers and email addresses online automatically.	Yes	Yes	No
Individualized Messaging - Send voice text for email messages to home.	Yes	Yes	No
Text to Speech - Speech text is converted to speech - a full way to connect all everyone.	Yes	Yes	No
Email Messaging - Send published emails as well as voice messages to everyone on your roster.	Yes	Yes	No
Auto-Import Credit Card or Checking account	Yes	Yes	Yes
Your name and number in Caller ID - Members will know it's your important call!	Yes	Yes	No
Early create Subscriptions to make messages to reach specific groups - youth, women, couples.	Yes	Yes	No
Messages - Quality design users who can send messages to one or more Subgroups.	Yes	Yes	No
Group Polling - set people who or respond with touch tone key to survey or answer questions.	Yes	Yes	No
Customized Alerts - One touch dialing lists to answer members with your phone and time and even continue being responsive to text messages.	Yes	Yes	No
1070N WEB - Web Based - Your members can go to your website and "log in" to hear your next message.	Yes	Yes	No
Audio Library - Pre-record your favorite messages to be sent at anytime.	Yes	Yes	No
Messages - Start immediately with no delay on that sounds like broadcasting calls.	Yes	Yes	No
Message introduction - Consistently introduce every church message (can be turned off if desired)	Yes	Yes	No
Call Scheduling - Schedule message delivery online or by phone during message recording.	Yes	Yes	No
Toll free Call Number - Call toll free number and enter your phone number to hear the next message.	Yes	Yes	No
Toll free Number access - One toll free number to place and manage calls anywhere anytime.	Yes	Yes	No

#WebOpt14

Original

One Call Now
when messages matter

Home > Religious > Pricing

Overview Small Churches Medium Churches Large Churches Synagogues Religious Orgs Other

Pricing

Religious Pricing and Quote Request

Special Pricing for Churches, Other Religious Organizations and Non-Profits.
For Business or Education pricing requests, please click here.

One Call Now Standard Plan for Churches

Our Standard Plan for churches, synagogues, religious organizations, and non-profits has all the popular features you'll need to make the most out of communicating with your members.

- Voice (phone)
- Text
- Email
- Subgroups
- Group Polling
- Full 2 min. Recording Time

Plus, you'll get One Call Now's personalized attention from people who understand the needs of churches and other organizations. For a complete list of capabilities, please visit our [Features Page](#).

Sample Plans

phone numbers in your calling list	Monthly Pricing	Sign Up Now!
> 50 numbers	\$22.99	sign up »
> 75 numbers	\$34.99	sign up »
> 100 numbers	\$44.99	sign up »
> 150 numbers	\$54.99	sign up »

These are some of our most popular plans. Don't see one that fits your organization? Contact us for a plan just for you!

FAITH
WESLEYAN CHURCH

"I want to thank you for this wonderful service. We have been with One Call Now since February with a 1000 call subscription. I recently added another 1000 calls as we..."

Yvonne R.
Faith Wesleyan Church

view more

Need a Larger or Annual Plan?
REQUEST A QUOTE

Or please call us toll-free or email us. We'll be happy to customize a plan for you.

Plus, you can save an **ADDITIONAL 10% OFF** with a One Call Now Annual Plan.

877-698-3262

Email Us

Variation

web optimization summit 2014

Experiment 1: Results



92.18% increase in conversion rate initiation

The paradox of choice ...

Page	Conversion Initiation Rate
Control – Lots of clickable options	7.29%
Treatment – Fewer clickable options	14.01%
Relative Difference	92.18%



Don't overwhelm people with options: Less really is more, most of the time ...

The paradox of choice



Sheena Iyengar: *The Art of Choosing*

web optimization
summit 2014

Experiment 2: Background



Experiment ID: OCN RFQ Button Copy

Location: OneCallNow.com

Test Protocol: n/a

Research Notes:

Background: My curiosity led me to test the Request a Quote button copy on our homepage.

Objective: To increase the number of people clicking the Request a Quote button.

Primary Research Question: Which button copy will produce the desired outcome?

Test Design: Sequential

Experiment 2: RFQ control

The screenshot shows the One Call Now website homepage. The header includes the logo "One Call Now" with the tagline "when messages matter", a search bar with a "GO" button, a "Contact Us" button with icons for phone, email, and fax, and a "LOG IN" button. A "SEND A MESSAGE" button is also present. Below the header is a navigation menu with links for Home, Education, Business, Religious, Sports, Emergency Management, Other, Mobile, and Blog.

The main content area features a section titled "Fast, Simple, Reliable Notification". This section is highlighted with a purple box. It contains the following text and list:

We are the industry-leading provider of routine and emergency voice, SMS text, text-to-speech, and email messaging services.

- Web-based system operates independently of your infrastructure
- Flexible plans accommodate groups of any size
- Eliminate miscommunication: everyone receives the same message at the same time

Below the list is the phone number 877-698-3262. To the right of this text is an image of a mobile phone on a keyboard, also highlighted with a purple box.

Below the main content area is a "REQUEST A QUOTE" button, highlighted with a purple box. To its right are two green buttons: "FREE TRIAL" and "LEARN MORE". Below these is another green button labeled "SAMPLE CALL".

On the left side, there is a yellow diamond-shaped sign that reads: "One Call Now offers early intervention against school violence. LEARN MORE ABOUT THE SAFE SCHOOL HELPLINE®".

On the right side, there is a "Notification News" section with three articles:

- Kids Read Now Kicks off Another Year of Summer Reading Success**
Jun 05, 2013
- 7 Suggestions to Handle Mega Disasters**
Jun 05, 2013
- One Call Now Launches New School Safety Service**
Apr 29, 2013

Below the news section is a social media widget for Google+ with "Like" and "Share" buttons. The text next to it says: "You, Amanda Nicole and 11,684 others like this."

At the bottom left of the page, there is a footer with the text "#WebOpt14".

Experiment 2: RFQ treatment

One Call Now
when messages matter

Search

Contact Us

Home Business Education Religious Sports Emergency Management Other Mobile Blog

One Call... Now everyone knows.

You need to send a message to a group of people. We can help you do it. Send voice, text, and email messages to your group with one click or call. Sign up for a **Free Trial** or **Request Pricing** to get started today!

- Get the word out faster, get back to your life
- Fast and trackable message delivery, affordable prices
- No hardware or software to purchase

FREE PDF DOWNLOAD: Six Tips for Improving Organizational Communication

First name *

Last name *

Notification News

Communication Solutions for Senior Living Facilities
Mar 20, 2014

Automated Dialer Helps K-12 School Communicate Quickly During Bomb Threat
Feb 28, 2014

Barren County Schools Score with One Call Now and SchoolPointe
Feb 28, 2014

Calamity Day Countdown?
Jan 27, 2014

Find us on Google+ +141 including You

You, Michael Dugan and 11,685 others like this.

Experiment 2: Side by side

The original website layout features a top navigation bar with a search box, contact links, and a login button. Below this is a secondary menu with categories like Home, Education, Business, Religious, Sports, Emergency Management, Other, Mobile, and Blog. The main content area is dominated by a large banner titled "Fast, Simple, Reliable Notification" with a background image of a smartphone on a keyboard. Below the banner is a list of bullet points and a phone number. To the left, there is a yellow warning sign graphic about school violence. To the right, there are four green buttons: "REQUEST A QUOTE", "FREE TRIAL", "SAMPLE CALL", and "LEARN MORE". Below these buttons is a "Find us on Google+" section with like and share buttons.

Original

The treatment website layout is a redesign of the original. It features a top navigation bar with a search box, contact links, and a login button. Below this is a secondary menu with categories like Home, Business, Education, Religious, Sports, Emergency Management, Other, Mobile, and Blog. The main content area is dominated by a large banner titled "One Call... Now everyone knows." with a background image of hands holding a smartphone. Below the banner is a list of bullet points and a "FREE PDF DOWNLOAD" section. To the left, there is a "Notification News" section with a list of articles. To the right, there are four green buttons: "REQUEST PRICING", "FREE TRIAL", "SAMPLE CALL", and "LEARN MORE". Below these buttons is a "Find us on Google+" section with like and share buttons.

Treatment

VS.

Experiment 2: Results



95% increase in conversion initiation

Led to an 82% increase in number of quote requests.

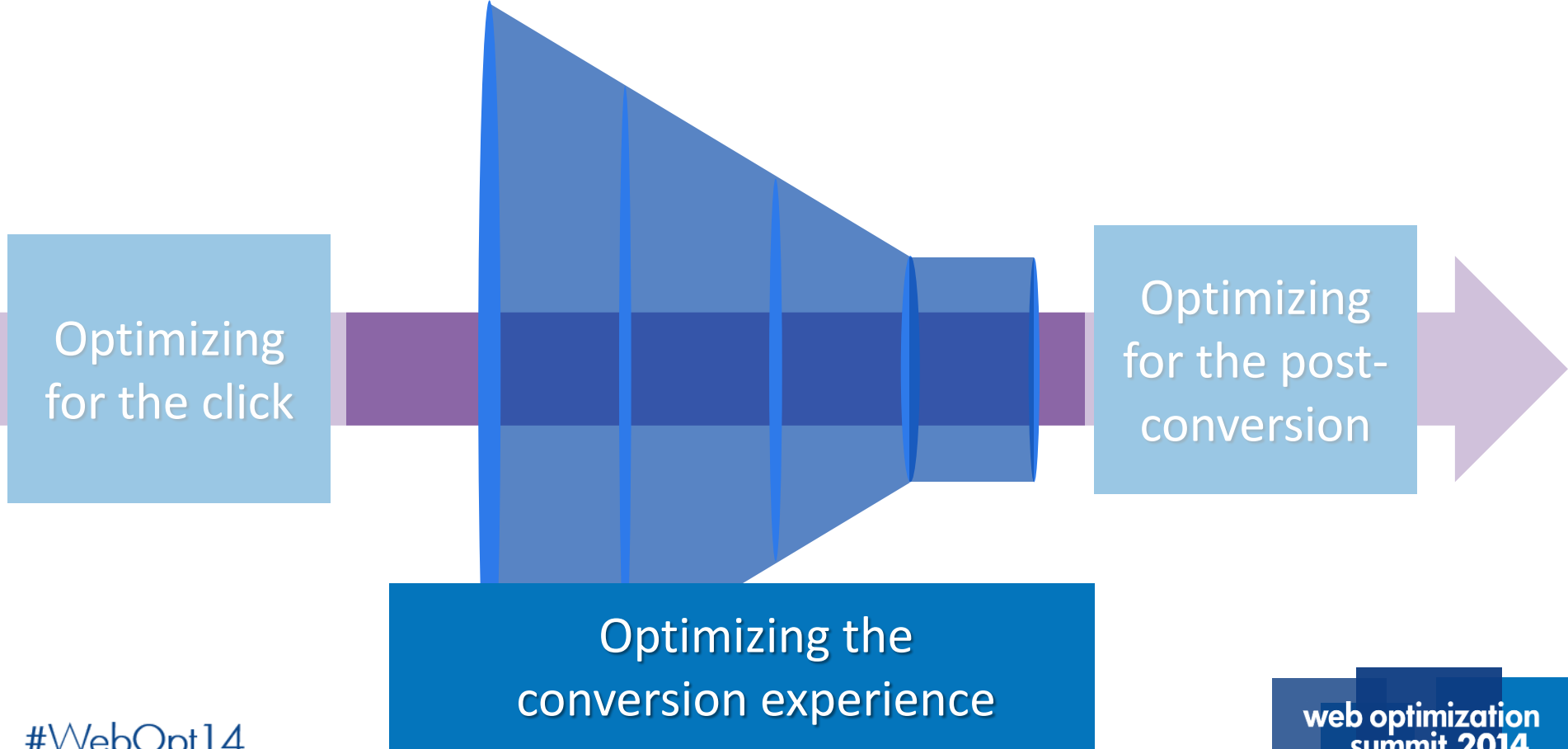
Test Page	Button Click Rate
Control – Button copy read “Request a Quote”	1.98%
Treatment – Button copy read “Request Pricing”	3.88%
Relative Difference	95.96%



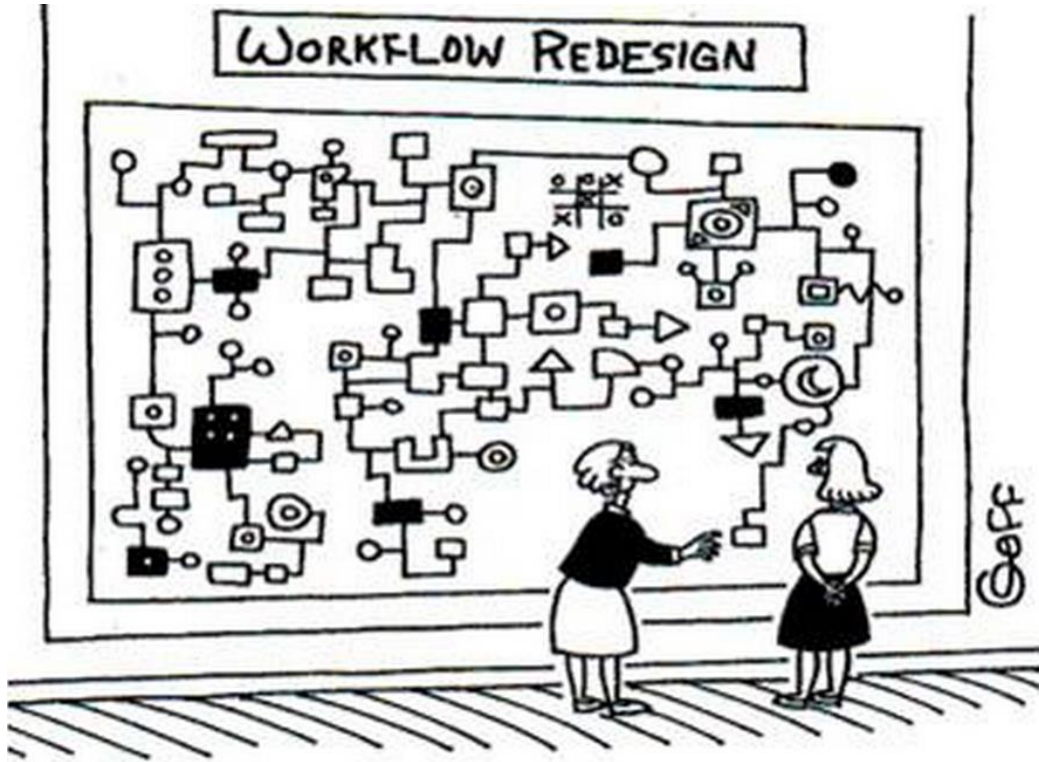
Language matters: Changing three words in your button copy can make a very large difference.

That's great – but we're trying to convert!

Part 2: Optimizing the conversion experience



Part 2: Optimizing the conversion process



$$C=4m+3v+2(i-\underline{f})-\underline{2a}$$

- Reducing friction
- Reducing anxiety

"And this is where our ED workflow redesign team went insane"

Experiment 3: Background



Experiment ID: One Call Now Free Trial Sign-up Process

Location: Homepage

Test Protocol: TP0004

Research Notes:

Background: Looking for ways to optimize the free trial conversion process.

Objective: To increase free trial completion rate.

Primary Research Question: Which version of our free trial sign-up process will produce a higher conversion rate?

Test Design: Sequential

Experiment 3: Free trial control

One Call Now
when messages matter

Search GO Contact Us

Home Education Business Religious Sports Emergency Management Other Mobile

1. Service Plan 2. Contact Address 3. Review Order 4. Sign Up Complete

Description Price

Free Trial

- 1-Month subscription
- 25 Message deliveries to member phone numbers
- 25 Phone numbers in member Roster
- 99 Subgroups for message distribution
- 30 Maximum seconds per message

Message Builder Hot Transfer
Email Messaging Weather Alerts
Call List Import Tool

Subtotal	\$0.00
*2.00% Regulatory Recovery Fee	\$0.00
Total	\$0.00

*This surcharge covers a portion of the fees, tariffs, access charges and usage taxes One Call Now pays for telecommunications use.

CANCEL CHECKOUT CHECKOUT

Experiment 3: Free trial treatment

1. Contact Address 2. Sign Up Complete

* Industry or Type of Organization

* Organization Name

* How did you hear about One Call Now?

* Number of Recipients

Contact Information

* First Name * Last Name

* Address

Address (cont.)

* Country * City * State/Province * Postal Code

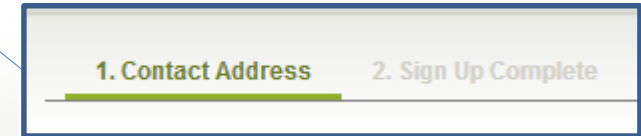
United States

Service is limited to the contiguous 48 states and Canada.

Important: Your phone number and email address will be used to deliver your login credentials and activate your One Call Now account. Please be sure to enter valid information.

* Phone Ext.

* Email Address * Confirm Email Address



Experiment 3: Free trial side by side

One Call Now
when messages matter

Search [] GO [] Contact Us []

Home | Education | Business | Religious | Sports | Emergency Management | Other | Mobile

1. Service Plan | 2. Contact Address | 3. Review Order | 4. Sign Up Complete

Description	Price
Free Trial	\$0.00
1-Month subscription	
25 Message deliveries to member phone numbers	
25 Phone numbers in member Roster	
99 Subgroups for message distribution	
30 Maximum seconds per message	
Canned Call	
Text-to-Speech Messaging	
Message Builder	
Email Messaging	
Call List Import Tool	
Family Profile	
Text Messaging	
Hot Transfer	
Weather Alerts	

Subtotal \$0.00
*2.00% Regulatory Recovery Fee \$0.00
Total \$0.00

*This surcharge covers a portion of the fees, tariffs, access charges and usage taxes One Call Now pays for telecommunications use.

CANCEL [] CHECKOUT []

Original

1. Contact Address | 2. Sign Up Complete

* Industry or Type of Organization []

* Organization Name []

* How did you hear about One Call Now? []

* Number of Recipients []

Contact Information

* First Name [] * Last Name []

* Address []

Address (cont.) []

* Country [United States] * City [] * State/Province [] * Postal Code []

Service is limited to the contiguous 48 states and Canada.

Important: Your phone number and email address will be used to deliver your login credentials and activate your One Call Now account. Please be sure to enter valid information.

* Phone [] Ext. []

* Email Address [] * Confirm Email Address []

CANCEL [] START FREE TRIAL []

Treatment

Experiment 3: Results

55% increase in completion rate



By shortening the sign-up process and changing the language in the CTA, we were able to see significant conversion rate increases from our free trial form.

Test Page	Conversion Rate
Control	15.65%
Treatment	24.3%
Relative Difference	55.3%



Reduce friction: Don't make your visitors work unnecessarily hard to convert.

Experiment 4: Background



Experiment ID: One Call Now Free Trial Optimization V2
Location: Homepage

Research Notes:

Background: After optimizing the sign-up process, I wanted to see if I could do more.

Objective: To increase conversion rate of free trial form.

Primary Research Question: Which version of the free trial sign-up form will produce higher conversion rates?

Test Design: Sequential

Experiment 4: Free trial opt. version 2 control

1. Contact Address 2. Sign Up Complete

* Industry or Type of Organization

* Organization Name

* How did you hear about One Call Now?

* Number of Recipients

Contact Information

* First Name * Last Name

* Address

Address (cont.)

* Country * City * State/Province * Postal Code

Service is limited to the contiguous 48 states and Canada.

Important: Your phone number and email address will be used to deliver your login credentials and activate your One Call Now account. Please be sure to enter valid information.

* Phone Ext.

* Email Address * Confirm Email Address



Experiment 4: Free trial opt. version 2 treatment

1. Contact Address 2. Sign Up Complete

* Industry or Type of Organization

* Organization Name

* How did you hear about One Call Now?

* Number of Recipients

Contact Information

* First Name * Last Name

Service is limited to the contiguous 48 states and Canada.

Important: Your phone number and email address will be used to deliver your login credentials and activate your One Call Now account. Please be sure to enter valid information.

* Phone Ext.

* Email Address * Confirm Email Address

* Preferred contact method
 Phone
 Email

* Best time to call
 Morning
 Afternoon
 Evening

* Preferred contact method

Phone

Email

* Preferred contact method

Phone

Email

* Best time to call

Morning

Afternoon

Evening

* Best time to call

Morning

Afternoon

Evening

Experiment 4: Side by side

1. Contact Address 2. Sign Up Complete

* Industry or Type of Organization

* Organization Name

* How did you hear about One Call Now?

* Number of Recipients

Contact Information

* First Name * Last Name

* Address

Address (cont.)

* Country * City * State/Province * Postal Code

United States

Service is limited to the contiguous 48 states and Canada.

Important: Your phone number and email address will be used to deliver your login credentials and activate your One Call Now account. Please be sure to enter valid information.

* Phone Ext.

* Email Address * Confirm Email Address

Original

1. Contact Address 2. Sign Up Complete

* Industry or Type of Organization

* Organization Name

* How did you hear about One Call Now?

* Number of Recipients

Contact Information

* First Name * Last Name

Service is limited to the contiguous 48 states and Canada.

Important: Your phone number and email address will be used to deliver your login credentials and activate your One Call Now account. Please be sure to enter valid information.

* Phone Ext.

* Email Address * Confirm Email Address

* Preferred contact method
 Phone
 Email

* Best time to call
 Morning
 Afternoon
 Evening

Variation

Experiment 4: Results



29% increase in free trial sign-ups

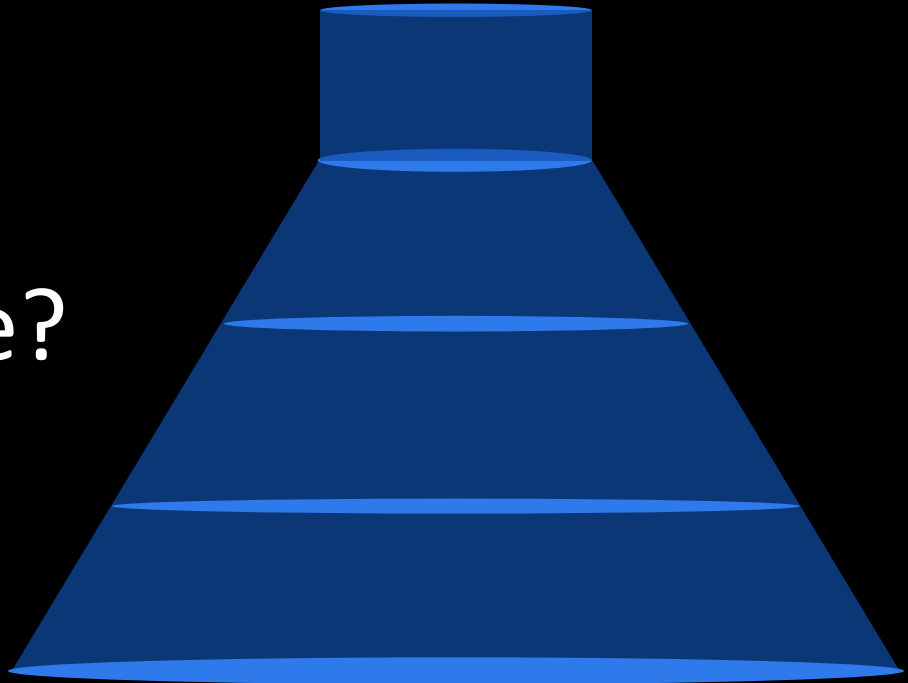
*By removing unnecessary fields from the free trial sign-up process, we were able to see significant **incremental** conversion rate increases from our free trial form.*

Test Page	Conversion Rate
Control	22.67%
Treatment	29.36%
Relative Difference	29.51%



Never stop optimizing: Even if you get a big win, you can **always** do better.

So, we're all done?





Optimization doesn't end here!

Part 3: Optimizing for the post-conversion

Optimizing
for the click

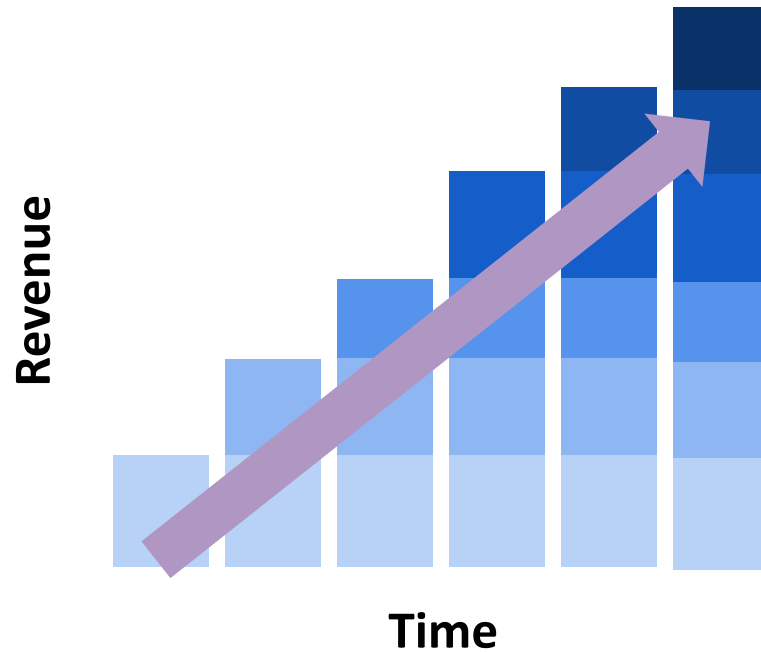
Optimizing
for the post
conversion

Optimizing the
conversion experience

“SaaS companies are unprofitable for the first 12-24 months of a given customer’s lifecycle...”



It's all about customer retention



It's all about customer retention



Revenue

Sticky customers are the lifeblood of subscription-based businesses

Time

One Call Now Case Study: The situation

The situation: We were welcoming new One Call Now clients aboard with an un-optimized onboarding process, with no metrics for measuring onboarding success. The customer renewal process also was not fully optimized.

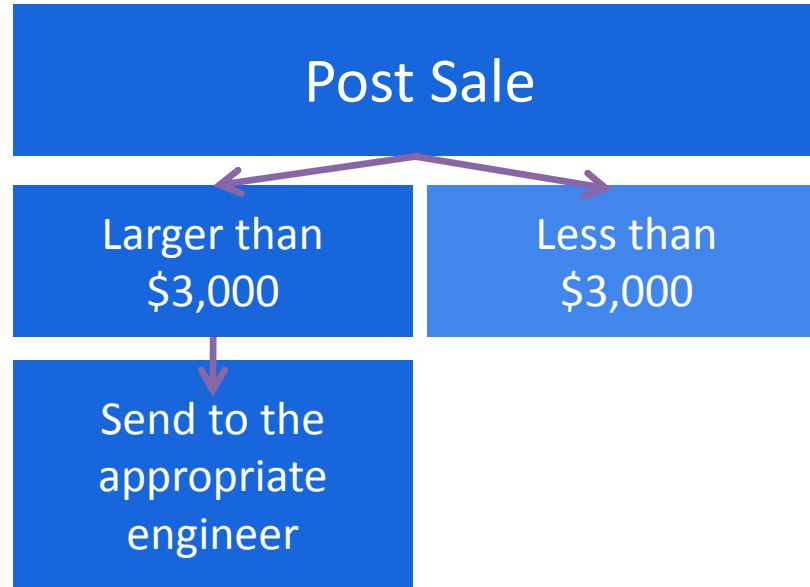
Project charter: “To improve the client onboarding experience”



Source: moolasavingmom.com

One Call Now Case Study: The situation

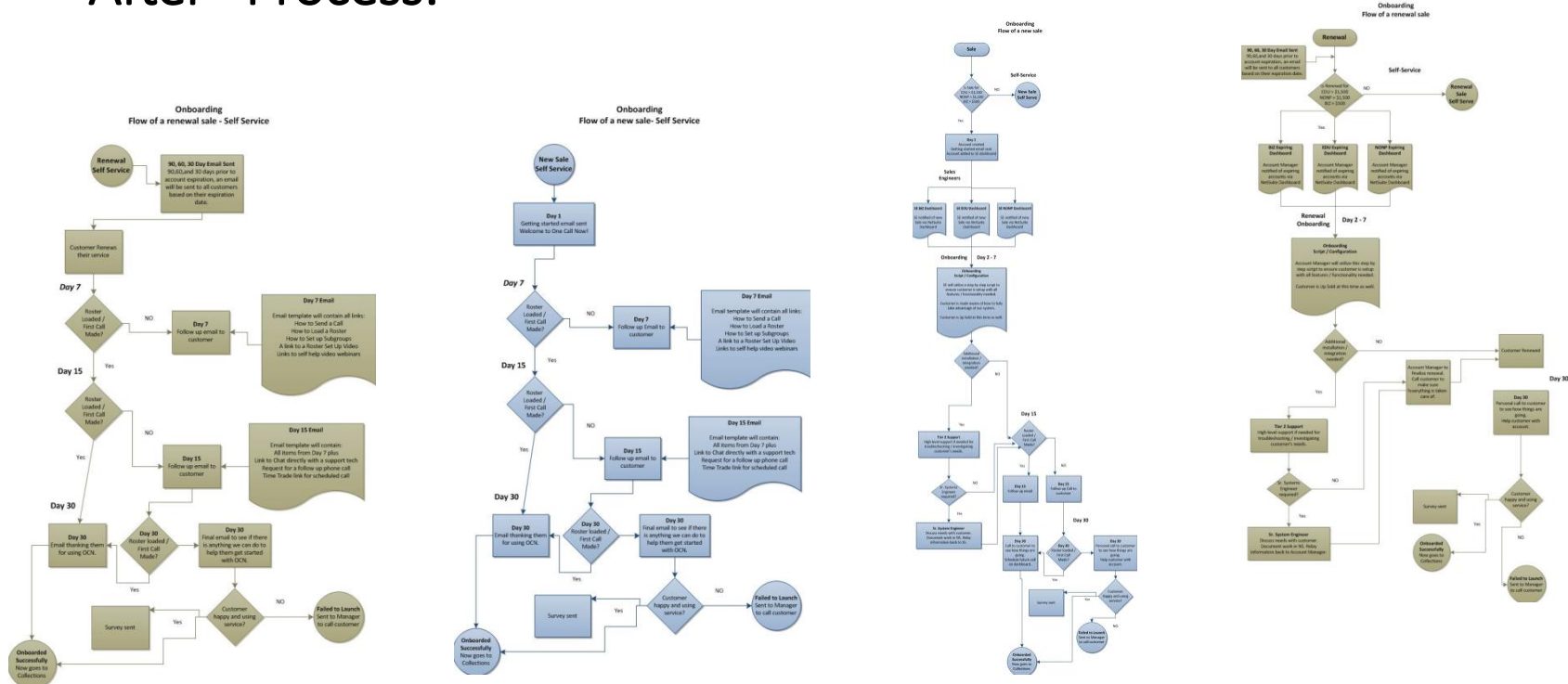
“Before” Process:



Metric for Success = Roster Load Time

One Call Now Case Study: The solution

“After” Process:

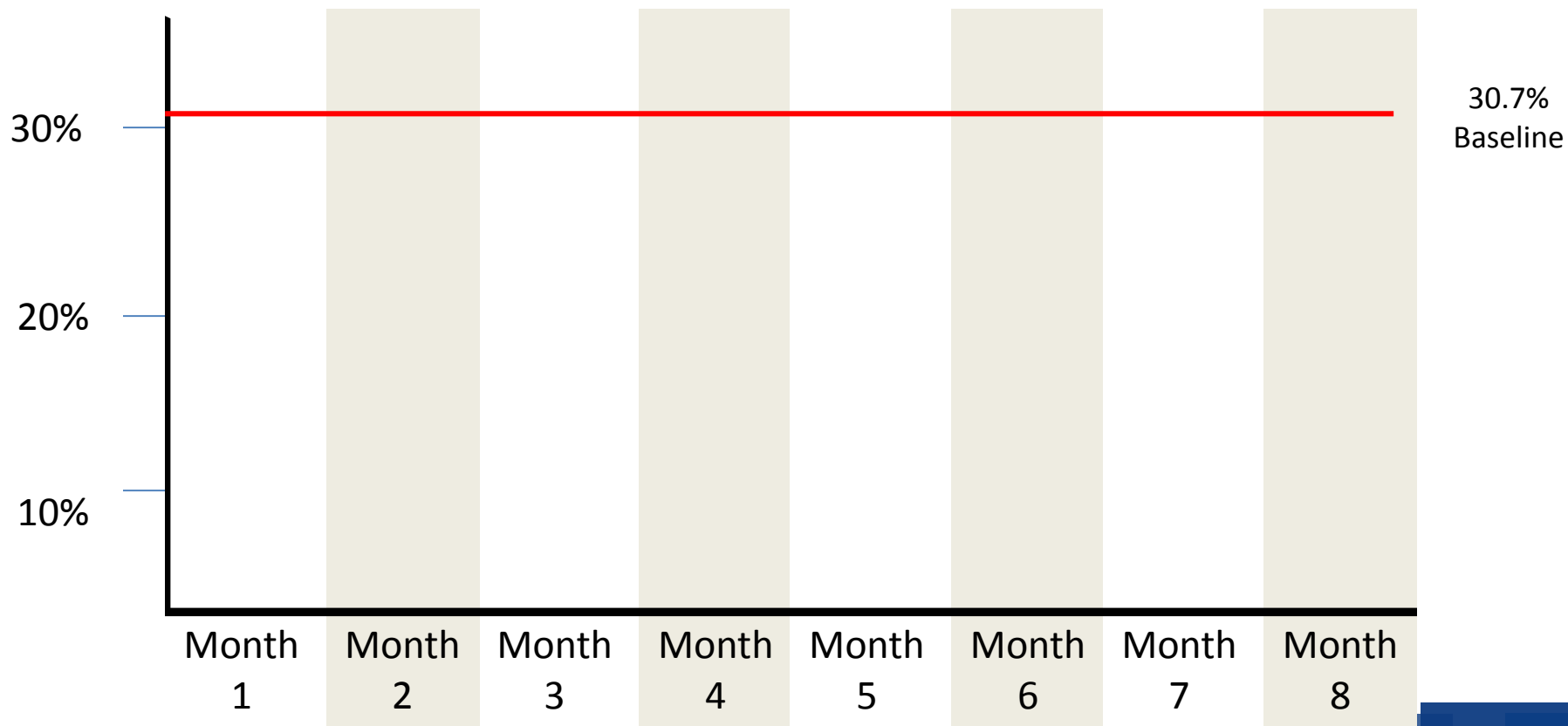


One Call Now Case Study: The solution

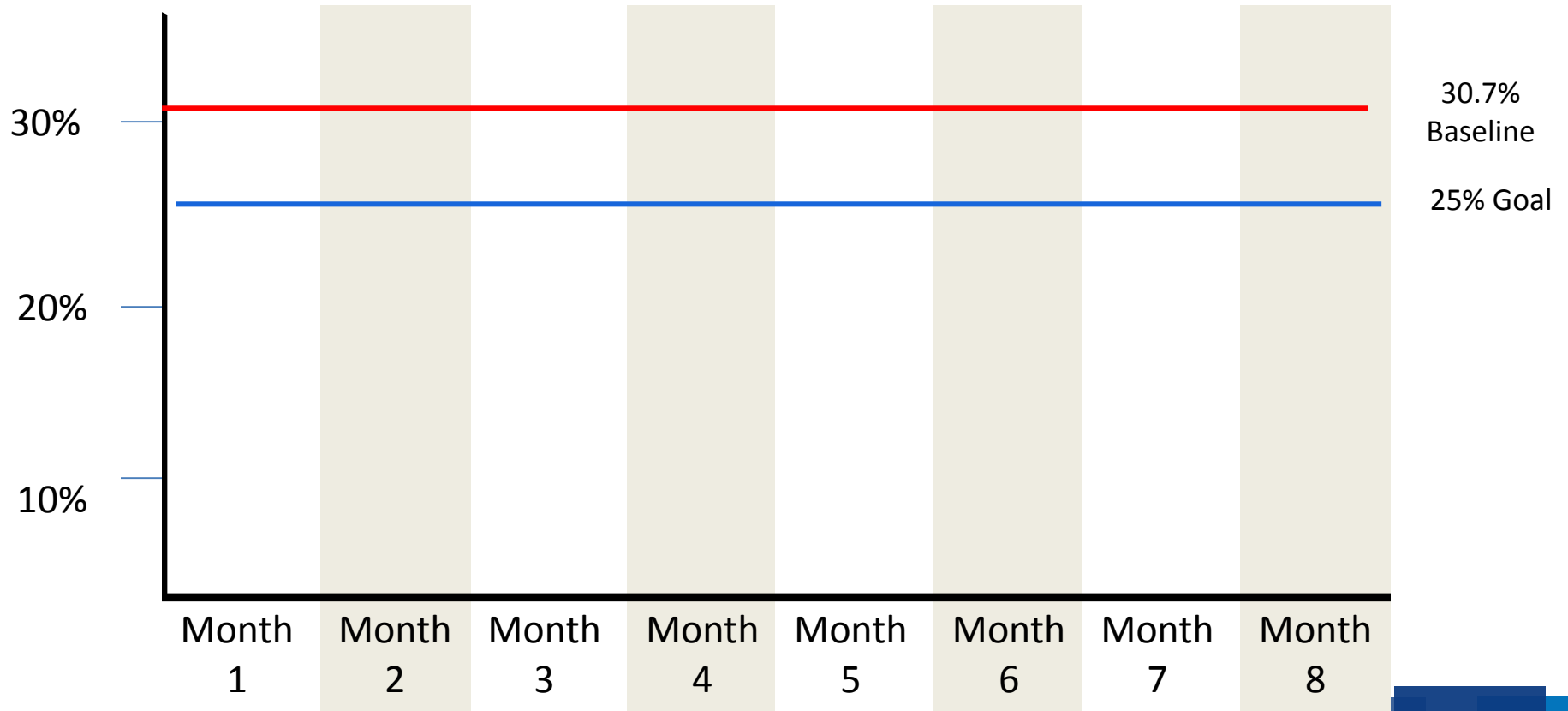
“After” Process:



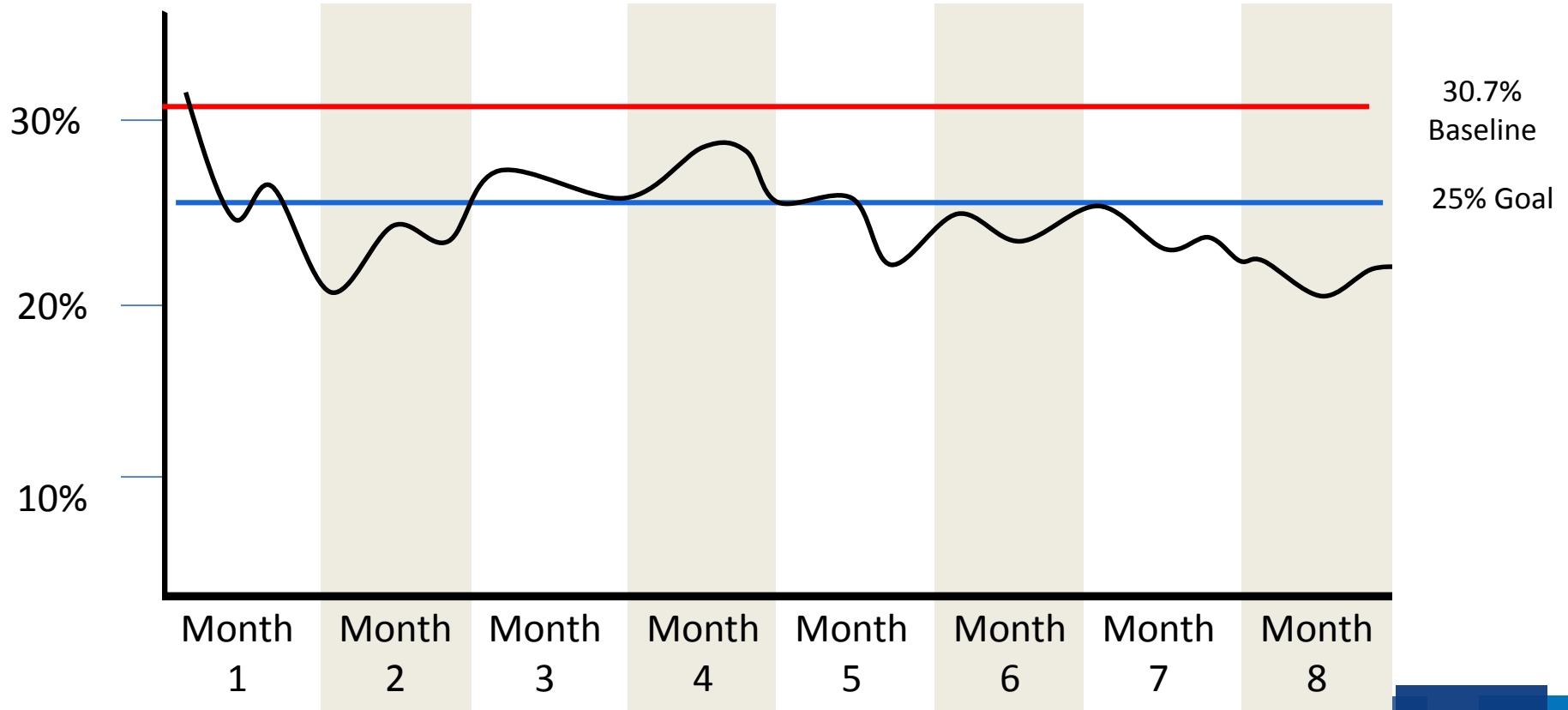
Not loaded within 15 days



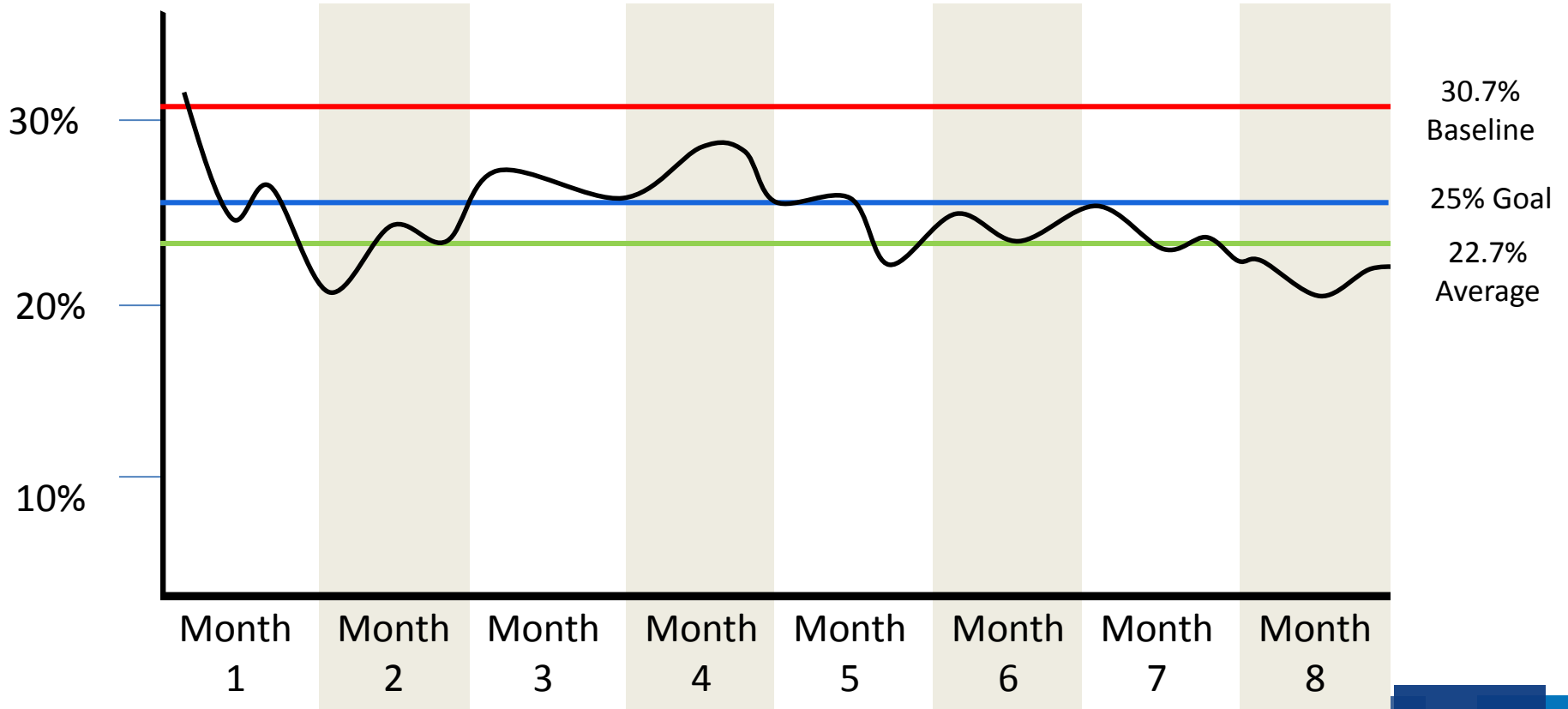
Not loaded within 15 days



Not loaded within 15 days



Not loaded within 15 days



Results



22.7% decrease in unloaded rosters

Average roster load time significantly improved by immediately onboarding all new customers.

Test Page	Rosters Unloaded
Control	30.7%
Treatment	23.73%
Relative Difference	-22.7%



Help customers realize your products' value: Onboarding processes for your customers help them realize the value of their investment sooner through quicker use of the product.

Main takeaways

1. Don't overwhelm. Remember the paradox of choice.
2. Language matters.
3. Reduce friction and anxiety by applying the conversion heuristic across the entire experience.
4. Optimization doesn't end with the sale, especially for subscription-based businesses.

Thank you!



Jacob Baldwin

@JacoBaldwin

Jacob.Baldwin@onecallnow.com



Taylor Kennedy

Taylor.Kennedy@MECLABS.com