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**An Oracle Consulting Checklist**

# Website Optimization Ideas to Explore



Checklists can inspire you, help you identify gaps, allow you to take inventory, and provide an easy-to-follow action plan. At Oracle Marketing Consulting, we use checklists all the time with our clients. In fact, we love them so much that we wanted to share some of our most useful checklists, including this one about optimization ideas for your website, mobile app, and other landing pages.

Because these destinations represent the critical last mile for many of your digital interactions with your customers, it's essential to always be watching how your customers react to the experience you've crafted for them. Routine A/B testing and optimization dramatically accelerates that flow of customer insights, so you can adapt even faster to what your customers want. In working with our clients, we focus our initial efforts around six pillars of optimizing a website:

- 1. Determine the goal of your content and express that in a clear call-to-action**
- 2. Use prime real estate above the fold on desktop and mobile**
- 3. Figure out the optimal path forward for each visitor**
- 4. Simplify the content as much as possible, so it's easy to understand**
- 5. Remove friction and distractions that may keep a visitor from moving forward**
- 6. Streamline the number of steps it takes to complete a journey**

On the pages that follow, you'll find more than 80 optimization and testing ideas that will help you act on those six pillars. In addition to lots of universal website optimization ideas, our list also includes ideas that are geared toward specific industries, such as retail, travel and hospitality, financial services, and others.

We hope this checklist inspires you to run more A/B tests and invest in site improvements so you can achieve the performance levels you're looking for. And, of course, if you'd like assistance, we're always here to help. Reach out to us at any time at [CXMconsulting\\_WW@oracle.com](mailto:CXMconsulting_WW@oracle.com).



**Chris De Marinis**

Head of Website Optimization & Personalization Services

**Oracle Marketing Consulting**

## Tips for using this checklist:

- ✓ **Check off** the website optimization ideas you've done recently, keeping in mind that you'll want to periodically rerun tests to reconfirm the winner since your audience and their needs are always changing.
- **Strike** the optimization ideas that aren't appropriate for your business.
- **Circle** the names of the optimization ideas you want to test or implement. When you're done going through the entire list, rank all of your circled optimizations by level of effort and level of impact to help prioritize your optimization schedule.



# Industry-Agnostic Website Optimizations

Regardless of your industry, here are some elements of your pages to consider A/B testing and optimizing:

## Overall site experience:

- Improve page speed.** Tracking scripts can serve a valuable purpose, but they can also dramatically slow your page load times, causing visitors to abandon your site. [Audit your page load times](#), especially those for key entry points to your site, such as your homepage, category or department pages, blog, and lead-generation forms. If the load times for any of those pages are lagging, look for slow-loading scripts or a high number of scripts and make changes to improve the experience for visitors and lower your bounce rates.
- Mobile-friendly responsive design.** Nearly every site is now responsive, but just because it's responsive doesn't mean it's mobile-friendly. Ensure that it is by following mobile-friendly best practices, such as using:
  - Legible fonts.** We recommend 14-18pt fonts for your copy. Headlines and subheads should be even larger.
  - Finger-friendly buttons and links.** For your primary calls-to-action, use large buttons that are at least 44px tall. Preferably, they should be full-width buttons so both lefties and righties can click them easily. For all of your CTAs, make sure they are spaced out, so a visitor won't accidentally click one link when trying to click another.
  - A single-column design.** In most cases, using a two-column design is going to make content—and especially text—too small to see well.

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*We've seen a 5-second load time lead to a 38% bounce rate. Having a page that loads fast across any device is the first part of a good user experience.*



**Chris Carlock**  
Principal B2B Consultant,  
Oracle Marketing Consulting

*We've all seen plenty of websites that are responsive—whose desktop experience are heavily designed and visually appealing—but are still really challenging to use on a mobile device. As more consumers surf the web on their phone, it's becoming more critical to design for the mobile experience, even if it means your desktop experience has to be less complex.*



**Jessica Stamer,**  
Consulting Technical Manager,  
Oracle Marketing Consulting

## Navigation and site search:

- Global navigation.** Ease of navigation is a tenet of user experience design that should be tested and optimized as your business grows. Determine which site pages get the most traffic and include those in the global nav by traffic order or by logical groupings. These are the pages your visitors will need to reach the most to improve their ease of site navigation. Test the number of links in your top and bottom navigation bars and recovery modules, as well as the text of your links. Also, consider testing a sticky global navigation bar that remains visible as a user scrolls down the page.
- Site search widget functionality.** The more SKUs you carry or content you provide, the harder it can be for your visitors to find what they're looking for. Providing a granular site search filtering that's helpful, but not overwhelming, is often the answer to this problem. Consider testing the following types of attributes:
  - Price ranges
  - Release or publication date
  - Customer rating or number of comments
  - Popularity or traffic
  - Availability
  - Product attributes, such as color, style/genre, material, performance, size/dimensions, etc.
  - Service attributes, such as location, amenities/features, departure/arrival points, etc.
- Add, remove, or change order of search filters.** If your company already has search filters, test additional tagging and filter options. If you already have a lot of filters, it's possible that some are no longer performing, so evaluate whether to remove one or more of them. Also consider changing the order of your filter options to see if that increases lift.
- Search results page design.** Does a list view or grid view perform better? How can you display more results above the fold? How many items do you show per results page—or can you do an infinite scroll? Test different approaches across devices to see what your visitors prefer.
- Add hover effects to results.** A hover effect can be added to the images in your search results so that additional views or details of that product are displayed without requiring the visitor to click through first. This puts more information in front of the visitor before they're asked to commit to that clickthrough. Test different hover effects to see if it increases conversion rates. Changing the order of your filter options to see if that increases lift.



## Content hierarchy & conversion paths:

- **Homepage content layout.** Make the purpose of your website as clear as possible to visitors. Your homepage should give visitors obvious paths to follow to the key portions of your website.
- **Content hierarchy.** Generally speaking, high-priority content should be featured high on your pages and use copy font sizes that are larger than those used for lower-priority content, which should be positioned lower on your pages.
- **Copy length.** The number of words in a content block is another big contributor to content hierarchy, but it also affects user-friendliness, as longer copy generally turns off visitors. While taking into consideration both what information is vital and your brand voice, test using less copy and shorter copy blocks.
- **New vs. returning visitor.** These two kinds of visitors have very different needs and goals. Identify each of these segments and display content accordingly to urge them forward in engaging with your brand.

- **Tailoring website copy to a visitor's journey.** Using technologies like dynamic content and field merges, apply the same content and keywords that brought a visitor to your homepage or landing page. For example, use the same PPC keyword that brought them to your landing page in the headline of the landing page. This makes the content more relatable to the user, which in turn gives you a higher conversion rate.

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*When trying to keep critical content above the fold, be sure to think through the user experience for each device type, as mobile's above-the-fold real estate is much smaller*



**Chris De Marinis**

Head of Website Optimization & Personalization Services,  
Oracle Marketing Consulting

## Offers:

- Percentage-off vs. dollars-off discount.** Generally, percentage-off offers are more effective at lower price points, while dollars-off discounts are more effective at higher price points.
- Sitewide vs. category vs. product discount.** Offering a discount on a smaller selection can lead to additional high-margin sales if the promotional items are popular, but broader offers will intrinsically appeal to a wider segment of your audience. Test to find the balance between higher sales and maintaining your margins.
- Other discount schemes.** Also consider testing other incentives, such as “Buy X Get Y” (e.g., buy 1 get 1 free, buy 2 get 1 free, buy 1 get 150% off, etc.) and tiered discounts (e.g., 20% off when you spend \$60, 25% off when you spend \$100).
- Size of discount.** Test how different discounts affect sales and your profits.
- Free shipping (thresholds).** Free shipping has become an expectation, but that doesn’t mean you should give it away too easily. Test different cart minimums to see if you can increase average order sizes and margins, while not dampening overall sales.
- Non-discount incentives.** Test offering other incentives such as a free gift with purchase, bonus loyalty points (e.g., double points), or a free e-gift card or reward card with purchase. The latter two examples have the benefit of driving additional orders later.

- Duration of promotion.** A short duration creates more urgency, but it can also turn off visitors who might feel overly pressured. That’s particularly true of high-consideration purchases, such as computers, B2B services, and cars. Test different promotion durations—everything ranging from a one-hour sale to a month-long promotion.
- Offer vs. no offer.** In addition to finetuning your offer, test value and benefit messaging with no promotion to see if a discount is even needed to drive purchases. Why give away margin if you don’t have to?

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*Wanting to avoid overloading stores, many retailers abandoned one-day sales in favor of week-long sales during the 2020 holiday season. For example, one of our retail clients turned their Cyber Monday sale into a ‘Cyber Week’ promotion and grew their sales by 60% that week versus the prior year.*



**Chad S. White**  
Head of Research,  
Oracle Marketing Consulting



## Urgency:

- **Sale and offer expiration countdowns.** Test whether highlighting when your current sale or offer will end boosts conversions. Test the effectiveness of this at different stages of the conversion funnel. You'll likely find that this tactic is much more effective if the expiration is soon, so you may use this approach more aggressively in the waning hours of a promotion.
- **Shipping countdowns.** Test whether adding an "Order by [X time] to receive delivery by [X date]" boosts conversions. You'll likely find that this tactic is most effective when there's little time left before the order-by deadline.
- **Real-time inventory.** Test whether highlighting remaining inventory or availability boosts conversions. For instance, you could say, "Only X in stock," "Only X rooms available at this rate," or "Only X seats available at this price." Test effectiveness of different placements of this messaging on the product page. You'll likely find that this tactic is most effective when availability is relatively low.
- **Real-time interest.** Test whether highlighting current interest in a product or service boosts conversions. For example, you could highlight that "X people are viewing this flight" or "X people have this product in their shopping cart." You'll likely find that this tactic is most effective when interest is high relative to the availability.
- **Perception of inaction risk.** Test whether heightening urgency with messaging such as "Will sell out" or "Limited supply" increases conversions. This tactic is best reserved for popular clearance items and popular services with limited capacity, for example.

- **Reservations and pre-orders.** While most brands allow pre-orders and reservations of items with limited availability that are expected to be popular (think: PlayStation 5 launch), there are also opportunities to capture the excitement around a popular item that's out of stock by letting people reserve that item or be notified when it's back in stock.

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*The key to using these tactics to drive urgency is that you must be genuine. You'll quickly lose a customer's trust if they realize that your company has a 'limited-time sale' every single week—or if you tell them limited quantities are available only for them to click through and find those boots they have their eye on are actually still available in every single color, half size, and width. Once it's lost, trust can take a long time to regain, if ever.”*



**Lizette Resendez**  
Senior Art Director,  
Oracle Marketing Consulting

## Hero & product images:

- Product vs. model vs. lifestyle shot.** With each approach making a very different appeal, test whether it's best to focus on:
  - The product itself*, where the messaging is about product features, product quality, and product aesthetics. If focusing on the product, also consider whether to show the product...
  - Flat*. You photograph the product on a white background or another generally flat surface.
  - On a mannequin*. For apparel, accessories, and other products, using a mannequin is an option.
  - In situ*. Instead of the product being isolated, you can photograph it in the setting in which it would typically be used. Just be sure the product doesn't get lost in the background.
- The product on or being used by a model*, where the messaging is in part about wanting your audience to identify with or aspire to be the model. If using a model, then you'll also want to consider...
  - Influencers vs. professional models vs. employees vs. real customers*. What's the right representation for your brand?
  - Different ages*. Try to stay aligned with your core user, but allow for appropriate variations. Keep in mind that your buyer and user may be different.
  - Different genders*. Try to stay aligned with your core user, but allow for appropriate variations. Keep in mind that your buyer and user may be different.
- Different family composition*. Depending on your audience, consider testing same-sex families, multiracial families, multigenerational families, single-parent families, or other family structures.
- Different poses and arrangements*. Your performance can be affected by facial expressions, body language, and the position of people in relation to other people, objects, and page copy and calls-to-action, among other things. On that last point, test whether clicks and conversions improve if the person in your image is looking at or gesturing toward key copy or the associated call-to-action button.
- The environment in which your end-user would use your product or service*, where the messaging is about having your audience identify with the activity or place portrayed in the photo, whether it's under the hood of a car, on a ski slope, or in a kitchen. You might also test daytime versus nighttime pictures.

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*For apparel, we've found that fit on model tends to be important to female shoppers, whereas male shoppers tend to value seeing product details much more. Depending on your audience and the garment you're promoting, you can test these different product images to confirm what resonates most with your subscribers.*



**Alexander Stegall**

Strategic Analyst for Analytic & Strategic Services,  
Oracle Marketing Consulting

- Image sourcing.** Test how your audience responds to imagery provided by the manufacturer, your brand, your affiliates or franchises, and your users.
- Captions.** These could be used to identify the person in the image, the person who took the photo, the place where the photo was taken, or provide commentary or editorial spin on the image. However, captions can also distract.
- Static image vs. animated image vs. video.** Movement can be powerful, but it can also distract, in addition to costing more to produce. Here are our recommendations for [the best use cases and best practices for animated gifs](#).
- Personalized or seasonal imagery.** Test updating your hero image based on what you know about the individual visitor or your customers at large based on their past behaviors. For example, test...
  - Imagery that aligns with popular searches.* For example, a travel company might display a beach vacation image on their homepage during those times of the year when those locales are most popular, whether that's heading into summer or during the winter when people are looking for tropical escapes.

- Imagery based on the visitor's postal or IP address.* For example, an apparel company would show people in shorts at different times of the year to someone from Vermont and someone from Arizona.
- Imagery based on shopper personas.* For example, a financial services company would show different imagery to a high net-worth customer than a customer with a low net-worth.

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*Photographs have the power to set expectations around what—and who—is valued. If you use photographs of people on your website, audit those images. Are you featuring a diverse group of individuals across ages, genders, abilities, body types, and ethnicities? If not, are these photographs communicating unconscious biases, prejudices, or stereotypes? Ask yourself: Who is being highlighted, and who is being excluded? Edit your selection to be more inclusive of our diverse society.*



**Lisa Stephens**  
VP, Creative,  
Oracle Marketing Consulting



## Calls-to-action:

- Placement.** Visibility is a key factor. While above-the-fold placements typically are best, CTAs for high-consideration purchases sometimes work better when placed lower on the page after your promotional and persuasive content, since visitors will have gotten the information they need to make a decision at that point.
- The number of CTAs.** For key CTAs, having two or more positioned at different points on your page may be worth testing.
- CTA visual hierarchy.** Not all CTAs are equally important, so they shouldn't be displayed the same way. Solid-filled buttons command more attention than ghost (transparent-filled) buttons, which in turn command more attention than text links. Test using that hierarchy for your primary, secondary, and tertiary CTAs.
- Size of button.** We recommend buttons that are at least 44 pixels by 44 pixels so they can be easily clicked or tapped. On mobile, consider using full-width buttons so lefties and righties can both easily click with their thumbs.
- Color of button.** Companies like Amazon and Google have famously tested hundreds of different colors for their key conversion buttons to find the top-converting color. Consider [the psychology of different colors](#).
- Styling of button.** Square or rounded corners? Shadows or flat? Those choices and others impact performance.
- Wording.** Action-oriented phrases typically perform best. Here are some other tests to consider:
  - Psychology.* Your CTA could drive more clicks by creating urgency, invoking community or peer pressure, demonstrating value, or using other psychological triggers.
  - Number of words.* Two to five words is typically the sweet spot.
  - Education level of words.* Simple words are generally more accessible, but you have to know your audience.
  - High- vs. low-commitment words.* Whether you're asking someone to "Buy now" or simply "Learn more" or "See details," your words have a huge impact on whether that person moves forward, especially with high-price and long term-commitment purchases.

- Personalize CTA keywords.** Visitors tend to convert better when you use CTA keywords to which they've already responded. Test dynamically changing the words of a CTA based on a visitor's response to previous CTAs. Remember that it's all about consistency throughout the buyer's journey.
- Mobile versus desktop.** Is your CTA optimized for mobile? Consider design adjustments that can be made in mobile to make your CTA as attractive as it is on desktop.
- Sticky footers and sidebars.** These can allow your primary CTA to stay in the viewing pane while visitors scroll through product and service details and other supporting content.



*In addition to paying close attention to and optimizing your primary CTAs, look to remove any low-priority links that may distract your visitors from taking the course that you most want them to take. The last thing you want is for a visitor to get distracted and click a nearby link to your Facebook page instead of your Buy Now button.*



**Chris De Marinis**

Head of Website Optimization & Personalization Services,  
Oracle Marketing Consulting

*Having clickable images or text above the fold isn't the same as having a CTA button above the fold. Instead of having excessive clickable areas that invite mobile tap errors, drive action with a CTA. Always test ideas and see what works best for your viewers."*



**Lauren Castady**

Associate Creative Director for Creative Services,  
Oracle Marketing Consulting

## Conversion process (checkout, registration, reservation, etc.):

- Number of conversion steps.** Clarity is the goal, but that could mean eliminating or adding steps, or consolidating or separating out existing steps. [Test different process configurations](#) to determine what your visitors find most intuitive.
- Number of fields per conversion step.** The more fields in each page of your conversion process, the higher your abandonment rate will be. Test the removal of fields that aren't absolutely necessary to complete the conversion. Keep in mind that additional information can be collected post-conversion, either directly after the conversion or as part of a [preference center](#) or progressive profiling.
- Adding a progress bar to checkout funnel.** Test whether a progress bar can enhance the customer experience and decrease bounce rates by showing the customer the total steps in the funnel and what each step entails.

- For particularly long forms and processes, consider allowing customers to use the progress bar to easily navigate back to earlier steps to add, change, or simply review information rather than forcing them to use their browser's back arrow.*

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*To identify opportunities for further testing, track page loads within a funnel or specific user journey so you can identify large drop-off points. This will help identify and inform future testing on these pages as you strive to increase progression rates to the next page.*



**Chris De Marinis**

Head of Website Optimization & Personalization Services, Oracle Marketing Consulting

## Popups, popovers, slide-ins, lightboxes, and other modals:

- The kind and size of the modal.** Some modals are fairly small and inobtrusive, while others block the entire screen, making it impossible to do anything before dealing with them. Both have their pros and cons.
- What triggers the modal.** A modal that pops up at the wrong time can be annoying, disruptive, and ineffective. Depending on the messaging of your modal and the page that it is on, test triggers based on time on page, time on site, pages browsed, activities performed, [exit intent](#), and more.
- The content of the modal.** Test to determine the most effective content, whether it's an email signup, a promotional deal, a recommendation of a certain product or service, a suggestion of relevant content, or something else.
- The trigger frequency.** If a modal is presented to the same visitor too often, it becomes annoying and may discourage future visits to your site. But if it's presented too infrequently, you miss opportunities.

- Dismissal method.** How can visitors close your modal? Do they only need to click outside of it or do they have to click an “X,” “Close,” or “No Thanks” button somewhere on the modal? Is that button really easy to see so it doesn't frustrate visitors?

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*Lightboxes and other modals can generate significant engagement because they require visitors to interact with them before they can continue. However, they can also be a big nuisance to visitors, so be sure to clearly define the behavior of your modal so it's not endlessly harassing your customers. Once a visitor dismisses it, consider not showing it to them again for, say, 2 weeks. You can then test a more or less aggressive timing and compare results.”*



**Kaiti Gary**

Director of Analytic & Strategic Services, Oracle Marketing Consulting

## Signup forms (for emails, loyalty program, etc.)

- Placement.** The top of your website and the bottom are [the most common positions for signup forms](#). While modals are also popular, they don't replace static forms. Also, consider these high-priority pages for extra placement consideration:
  - Pages with high bounce rates.* Test the use of static and dynamic forms to capture email consent in exchange for instant discounts and other incentives in order to generate more value from pages that typically bleed traffic.
  - Pages for products that are out of stock.* Give shoppers the opportunity to sign up to be notified when the product becomes available again. At the same time or later, use this as an opportunity to collect broader consent for other messages as well.
- Value proposition.** Why should I sign up for this? That's the question that each of your consumers is asking themselves. You need to give them a compelling answer. Test different value props, keeping in mind that your winning language will likely vary depending on the page and who is driven to that page.
- Number of fields in form.** The more fields in your form, the higher your abandonment rate will be. Test minimizing [the number of fields on your signup form](#), and then get additional information post-signup on the signup confirmation page, through progressive profiling, or through a successful conversion.
- Information requested.** Asking for sensitive information and additional contact information tends to significantly reduce form completion rates.
- Call-to-action.** Test different value- and action-oriented CTAs. Remember that no wants to "Sign up for email," but they do want to "Get deals," "Be an insider," and "Join the movement."

- Communication channel preference.** Test providing visitors with options for how to receive brand communications, particular ones that align with the device being used to engage with your brand. For instance, mobile visitors may be interested in receiving promotions via SMS and mobile push, in addition to email. Adapt the messaging to the visitor experience.



*We see that even with optional fields, the more fields your form has, the higher the abandonment rate is. Leveraging progressive profiling allows you to collect additional information later on, which lets you create signup forms with fewer fields and therefore less abandonment.*



**Ferris Boyd**

Senior Cloud Consultant,  
Oracle Marketing Consulting

*Modals are effective at getting visitors' attention and driving action. However, if you don't set limits on how and when they appear, they can harass and annoy your customers and prospects. Creating a negative environment like that is never good for business.*



**Chad S. White**

Head of Research,  
Oracle Marketing Consulting

## Loyalty program:

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- Design of signup call-to-action in top navigation.** To grow any loyalty program, you must ensure that your loyalty program call-to-action stands out and that visitors are able to clearly understand the reasons why they should enroll. Your loyalty program signup can benefit from many of [the methods for optimizing email signup forms](#).
- Placement of loyalty program value proposition in conversion funnel.** Lightboxes containing a simple signup form and clear value proposition are always worth testing if driving loyalty signups is a priority for your company. Test different placement of this form or lightbox, keeping in mind that different placements will require different messaging based on that different context. Integrating your loyalty program signup into your checkout process can drastically reduce the signup process since they've already entered key information.
- Personalization of membership or loyalty tier thresholds.** Providing your high-value customers with a tailored experience is imperative to maintaining and growing your loyalty base.

**Oracle CrowdTwist** helps you connect your largest and most valuable customers with loyalty and reward programs specifically targeted to them. CrowdTwist increases profitability, deepens customer relationships, and improves customer retention.

[Learn more about Oracle CrowdTwist.](#)

# Industry-Specific Website Optimizations

Here are some additional website optimizations and A/B tests to consider on an industry-by-industry basis:

## Travel & hospitality:

- Personalized bundles and other recommendations.**  
Travel bundles and packages are common. The next step is to test personalized bundles based on the customer's favorite departure airport, favorite destinations or kinds of destinations, favorite activities, and other add-ons and upsells based on previous purchases and browsing behavior.
- Combining guest information and payment steps.**  
Test whether consolidating funnel steps reduces overlapping required fields and makes the funnel seem less intimidating for visitors.

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*For one of our travel and hospitality clients, we created different landing pages, content, and email newsletters for each of their three main travel personas: those who mostly travel to cities for work, who want city-specific articles and travel recommendations; those who tend to travel to the same beach resort location every year, who we tried to introduce to new similar locations; and those who travel mostly with friends and family for celebratory events. It allowed our client to serve their key customer segments much more effectively.*



**Lizette Resendez**  
Senior Art Director,  
Oracle Marketing Consulting

**Navigate your hospitality operations for the new next.** Elevate your hospitality business with mobile, on-demand, and cloud-based services you need to personalize service and deliver exceptional guest experiences that win customer loyalty. Oracle is leading the way toward a new decade in hospitality technology, with an array of software and hardware focusing on property management, point of sale, reporting, analytics, and much more. [Learn more about Oracle for Hospitality.](#)

## Media & streaming services:

- Different content recommendation algorithms.**  
Understand if your visitors prefer content recommendations based on what episode or clip is next in regards to the air date, based on what similar viewers are watching, based on genres, or something else. It might be an all-of-the-above approach, where you then need to decide the optimal order in which to display your different recommendation paths

**Keep pace with digital-savvy consumers.** Oracle helps media and entertainment companies address challenges in transitioning to and succeeding in the digital world. Plan for the future as you seek to attract, develop, and retain talent, and empower a collaborative digital workplace to improve productivity. [Learn more about Oracle for Media & Entertainment.](#)

## Retail, ecommerce, & other B2C companies:

- Alternative checkout funnel designs.** In addition to the conversion funnel tests mentioned earlier, consider redesigning the checkout funnel to create a better customer experience and higher conversion rates. Adding additional promotions as part of the redesign or switching the location of elements can help decrease the amount of time it takes to reach the final step. You can also present the customer with opportunities to see other offers or promotions, including an area for upsells and other product recommendations throughout the funnel.
- Sticky shopping cart modal.** Test whether it improves conversions when you make a shopper's cart always visible once they add anything to it. Being able to easily see what's already in their cart can help them make decisions about what else they might need to purchase, help them build toward the free shipping minimum purchase, or help sway them not to abandon their cart.
- Personalized discounts for customers with high lifetime values.** Test using elements like a light box on your homepage to show your best customers products that would be more suited for their next purchase and a promotion discount that can be applied to their purchase. Personalizing to the value of the customer can increase conversions.
- Product detail page design.** In addition to already mentioned tests about images, CTAs, and other elements, consider testing the following to help your customers to find the product information they need with greater ease so you get more "add to cart" clicks:
  - Reduce or increase the amount of product information.* Generally speaking, decluttering product pages is the trend, but some of your products may be lacking information that would increase conversions.
  - Information visibility.* Some product information is of wide interest, but some information is only essential to a much smaller subset of visitors. Test placing less popular information in accordions, so that it's available but not taking up valuable screen real estate and distracting from other details.
  - Rearrange page elements.* Swapping the positions of elements on the page, putting the most important information above the fold, can enhance the customer experience.
- Add or enhance product recommendations.** Personalized content can be a powerful catalyst for add-to-carts and purchase conversions, as well as customer retention. You can find opportunities to add this content on your homepage, on product detail pages, within the checkout funnel, and in other places.

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*If you offer high-consideration items, monitor for buyers conducting a lot of research on your site. Signs to watch for include viewing videos, visiting your site multiple times, scrolling deep into pages, and long read times on select pages. Test what will best get over these visitors over the finish line—whether it's a pop-up that compares products side-by-side, special promotions that bundles items, financing options, or some other nudge.*



**Clint Kaiser**

Head of Analytic & Strategic Services,  
Oracle Marketing Consulting

**Put your customers at the heart of your retail business.** With a complete set of mission-critical retail solutions, cloud services, and hardware from Oracle, you'll gain the insights and agility you need to delight customers at every touchpoint.

[\*\*Learn more about Oracle for Retail.\*\*](#)

## B2B companies:

- Lead form design.** These benefit from many of the conversion process tests and modal tests we discussed earlier. Also consider testing:
  - Lead form timing.* When does this form appear? On which pages?
  - Auto-populating known values.* You may already know a visitor's name, email address, title, company name, and more. Don't make them re-enter those in a lead-gen form.
  - Progressive profiling.* Related to auto-populating, progressive profiling allows you to render up fields to request information you don't already have for a contact. For instance, if you have a contact's first and last names already, there's no need to ask for those again. Instead, render up other fields to request new information. This not only helps you reduce friction by shortening your forms, but also allows you to gather a more complete contact profile over time.
  - What happens next.* As with any form, it's important to explain what happens when the form is submitted. That's extra critical when it comes to lead forms because of the wild variability of what happens next across companies. Is the person going to receive a call, email, text, or some other communication? If the form was for a downloadable, will that be delivered via email or on the submission confirmation page?

- Displaying personalized content based on visitor's industry or organization.** By leveraging data from your [account-based marketing \(ABM\)](#) platform, you can test out which content and language resonates most with visitors from your key clients and most important industries.

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*ABM can be used for more than just content on your landing page. It can also be used to gather firmographic data to help reduce form fields or other data points you can use later in the buyer cycle to help facilitate a close-won opportunity.*



**Chris Carlock**  
Principal B2B Consultant,  
Oracle Marketing Consulting

## Financial services:

- **Quote or application process flow.** In addition to the conversion funnel tests mentioned earlier, consider:
  - *Start an application call-to-action.* Given the importance of this CTA to most financial services companies, ensure that it is large and visible above the fold on the website's homepage. Regularly test this CTA using the call-to-action suggestions we discussed earlier.
  - *Adding a progress bar to the application process.* While we recommended this among our conversion process suggestions, it bears stressing for financial applications, which are almost invariably complex and multi-step.
  - *Reducing the number of pages in the process.* The longer it takes for a visitor to convert, the less likely they will be to do so. Test different ways to shorten this process so you can reduce abandonment rates.
- **Add an abandonment or exit-intent lightbox.** When a user tries to abandon the application funnel, trigger an [exit-intent message](#) to offer help via another channel, including collecting their email address, which will allow you to retarget them and encourage them to come back and complete their application.
- **Add or optimize personalized product recommendations.** Provide dynamic content recommendations for credit cards, savings accounts, loans, or any other financial products based on visitor information.

- **Use star ratings or reviews on product pages.** Highlight the positive feedback other consumers have left for your company, as consumers are most likely to trust other consumers when deciding whether to convert.
- **Remove unnecessary copy.** While we recommended testing shorter copy blocks among our content hierarchy suggestions, this is particularly imperative for financial institutions, many of which crowd their product pages with legal disclaimers and other unnecessary copy. Reduce the amount of text on pages and move all legal disclaimers to the bottom of the page to best utilize space.

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*A multichannel application abandonment strategy is key in the financial services space. Knowing where visitors abandoned within the application process can yield two key benefits: First, it helps you identify high-abandonment steps so you can simplify, clarify, and fix the issues driving those higher rates. And second, it allows you to send follow-up communications that are tailored to where in the process the abandonment occurred.*



**Cristal Foster**  
Manager of Expert Consulting,  
Oracle Marketing Consulting

**Empower customers by helping them make the right financial decisions at Life Moments.** Our financial services solutions help businesses to build digital ecosystems that empower customers to manage and enrich their financial lives. With our data-driven FinTech solutions, financial institutions can get the in-depth insights that enable them to make better business-critical decisions. [Learn more about Oracle for Financial Services.](#)

## Insurance companies:

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- Navigation improvement.** Test a slider on your homepage that allows visitors to easily switch between and learn about the multiple forms of insurance that you offer, whether it's auto, home, boat, rental, or another policy.
- Emphasize the Get a Quote button on the homepage.** The "Start quote" call-to-action should be the biggest call out on your homepage. Ensure that it's above the fold and draws the attention it deserves by regularly testing this CTA using the call-to-action suggestions we discussed earlier.
- Bundle and Save options.** To increase your cross-selling opportunities, when visitors are selecting their insurance, test adding a button to bundle that policy with additional ones for auto or home. Consider different positions in the funnel and different CTA wording and styling.
- Personalized with local agent information.** Often, consumers want to talk to an agent before buying insurance. Test displaying the names and contact information of insurance agents who are local to the site visitor so they can quickly reach a local representative.
- Retrieve my Quote button.** If a visitor has received a quote previously, retarget them when they land on the homepage again, presenting them with a "Retrieve my quote" button so they don't have to repeat the application process.
- Provide quote options.** When providing the final quote, instead of giving just one option, test presenting multiple options from basic to advanced for the opportunity to upsell visitors.

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## Healthcare providers:

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- Urgent messaging.** Use headers, lightboxes, and other means to provide critical updates, whether it's about COVID-19, the flu season, or another important issue that patients and their families need to know about to stay healthy and safe.
- Need a Doctor? directory.** Patients are looking for and are loyal to doctors as much as hospitals and hospital systems—perhaps more so. Include a doctor directory and hospital locator on your homepage so visitors can easily find the appropriate care.
- Find Forms Online service.** Consider including all medical forms on your website, so patients don't have to complete them in waiting rooms. This can decrease potential patient wait times and provide better information as patients may not be rushing as much to complete your forms.
- Book an Appointment online option.** Consider adding a scheduling service on your website so patients can set up their appointments online without having to call.
- Patient Portal login.** If you offer a patient portal, include a login section on your homepage to make it easier for patients to find so they can access all their records and forms and pay their bills.
- Chatbot assistance.** Utilize chatbot technology to allow visitors to describe their symptoms or needs so the bot can direct them to the right sources for more information and next steps.
- Make a Donation capability.** Include a donation call-to-action on your homepage so visitors can make charitable donations to healthcare networks and foundations.

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## Optimizing your website can vastly improve your customer experience, which can lead to both gains in conversions and loyalty. We can help with that—and much more.

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