



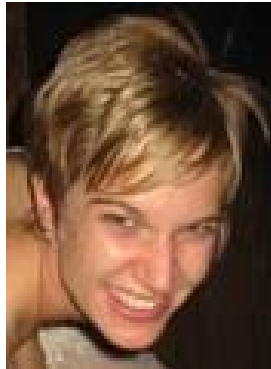
Optimizing Your Web site 101.5:

Engaging Site Visitors with a Personal Experience

Misty McLaughlin



About the presenter



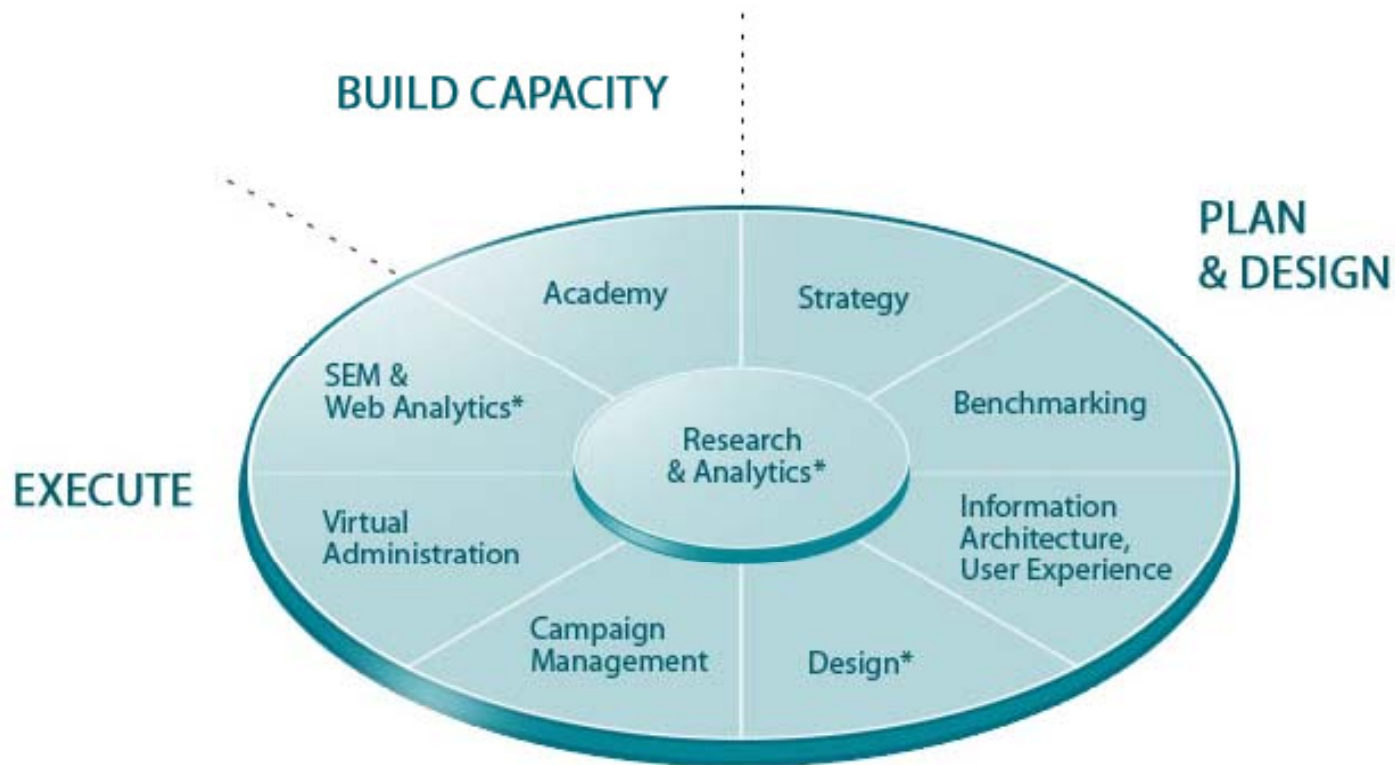
Misty McLaughlin

Manager of User Experience & Design

- Expertise in Internet strategy & marketing, user experience consulting, information architecture, usability and accessibility
- *Clients have included:* American Red Cross National, Easter Seals, Autism Society of America, Jewish National Fund, Canadian Wildlife Federation, U.S. Fund for UNICEF, Trisomy 18 Foundation, United Negro College Fund, Defenders of Wildlife
- M.S. in Information Architecture, B.A. in English Literature, Women's Studies, and Philosophy

About Convio's Client Success Services

50+ person agency within Convio to provide clients with the strategy, interactive services and online marketing best practices to achieve ongoing success



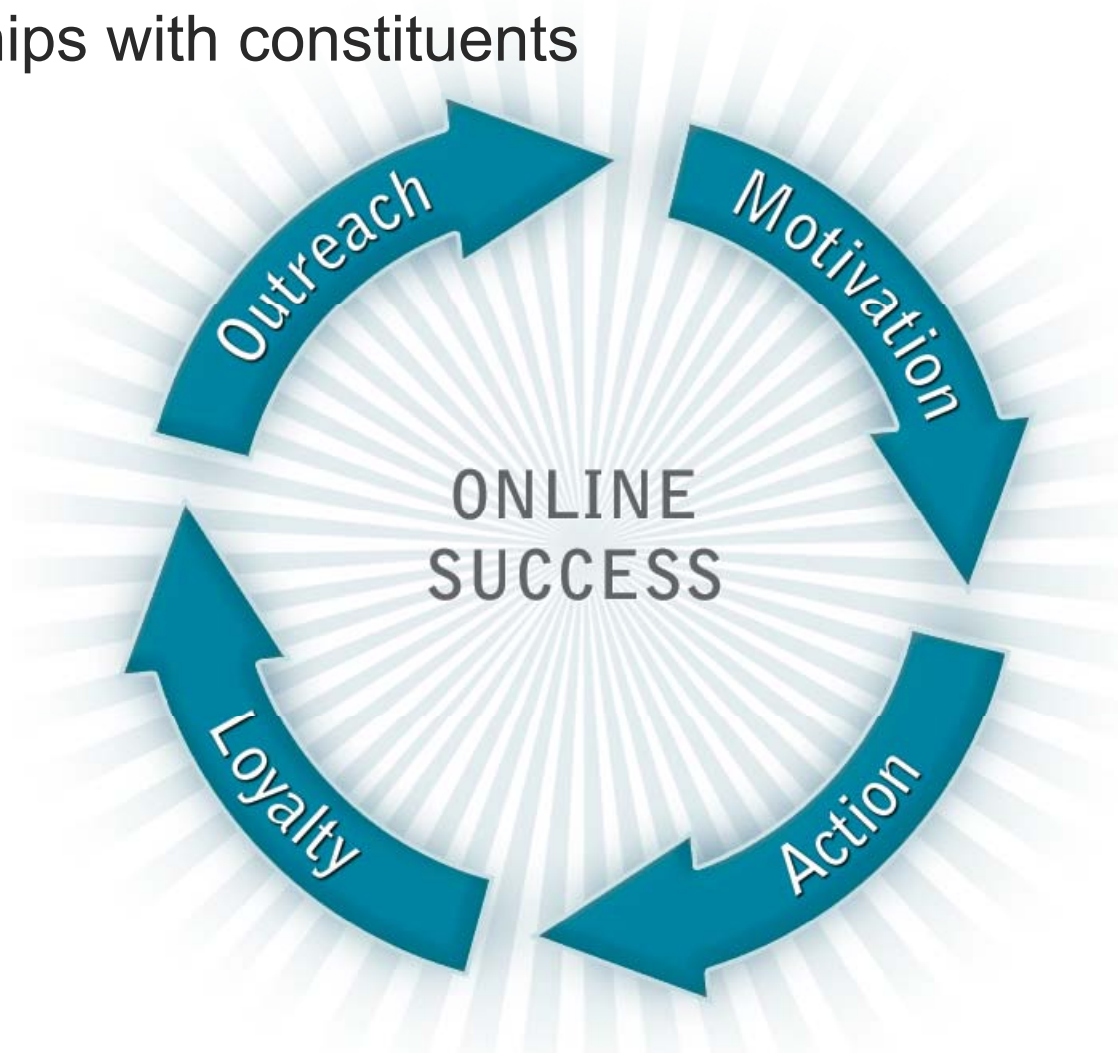
* Utilize specialized partners

Webinar 101 Two-Part Series

- *Optimizing Your Web site 101* is focused on design and techniques for your Web site – getting visitors in and getting them to stay
- *Effective Online Marketing 101* is focused on outbound marketing techniques and campaigns – drawing visitors in through targeted communications

Relationship Building Framework: eCRM

eCRM is the practice of using the Internet to build life-long relationships with constituents



Relationship Building Framework: eCRM

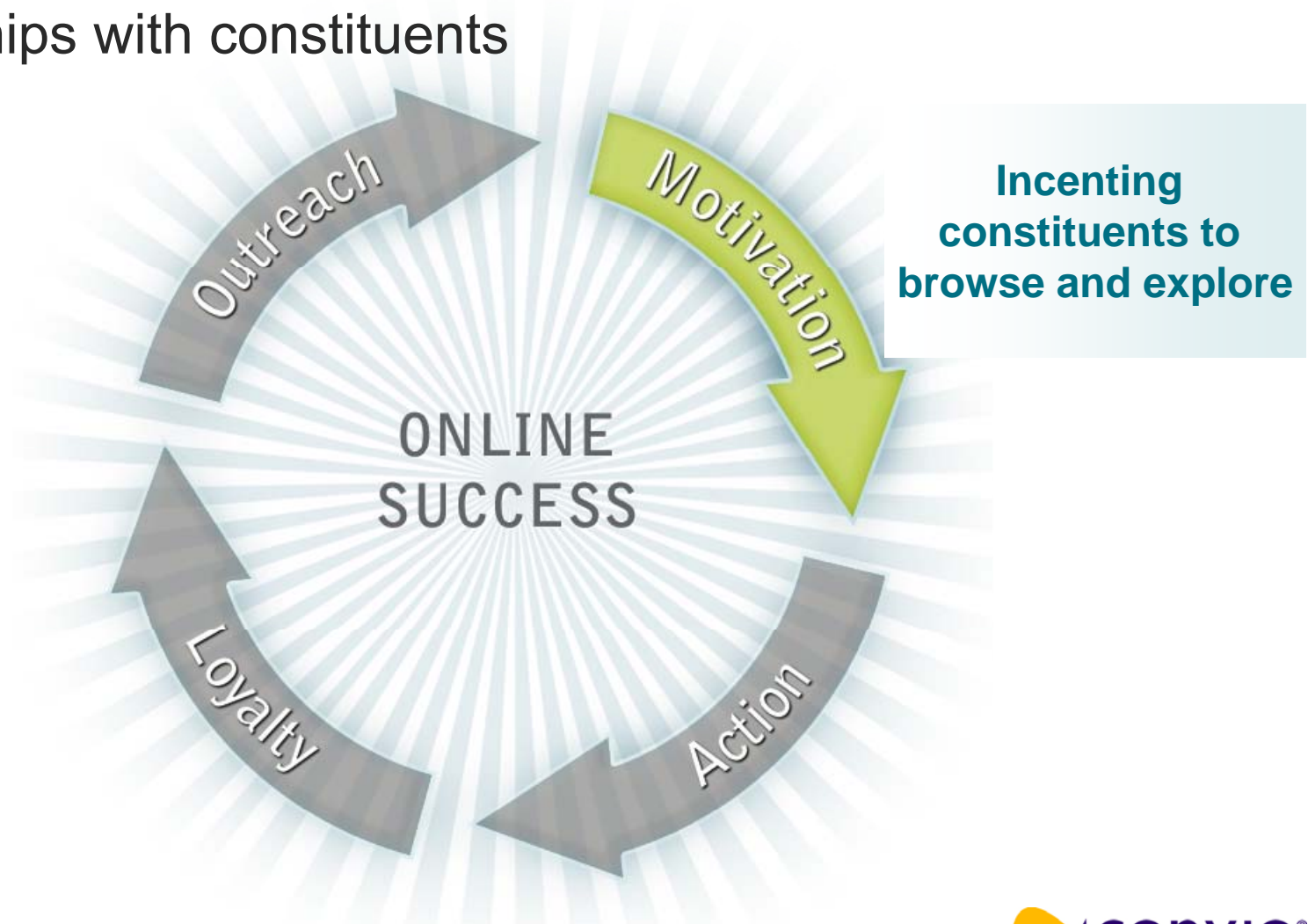
eCRM is the practice of using the Internet to build life-long relationships with constituents

Strategically
drawing traffic
into your site



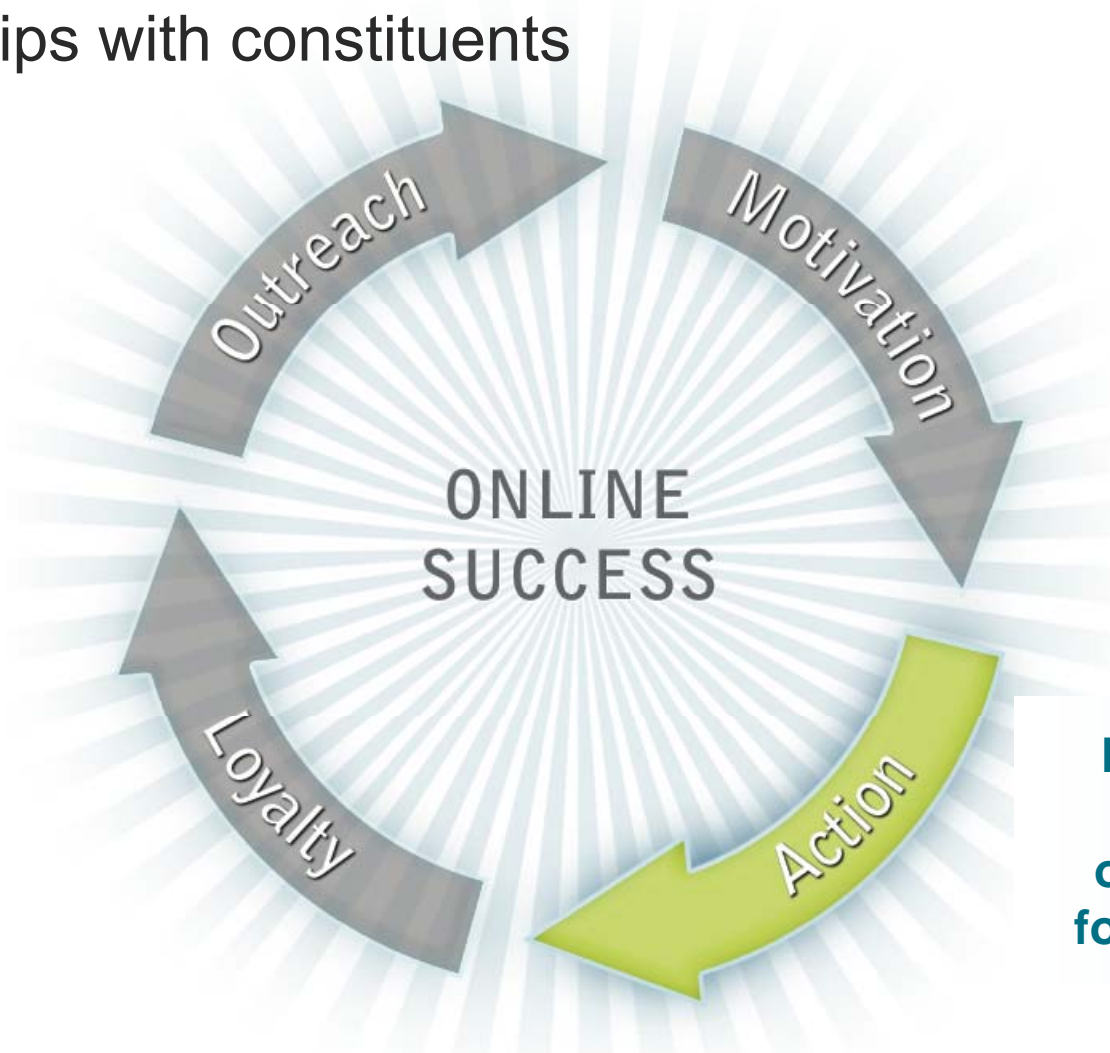
Relationship Building Framework: eCRM

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Relationship Building Framework: eCRM

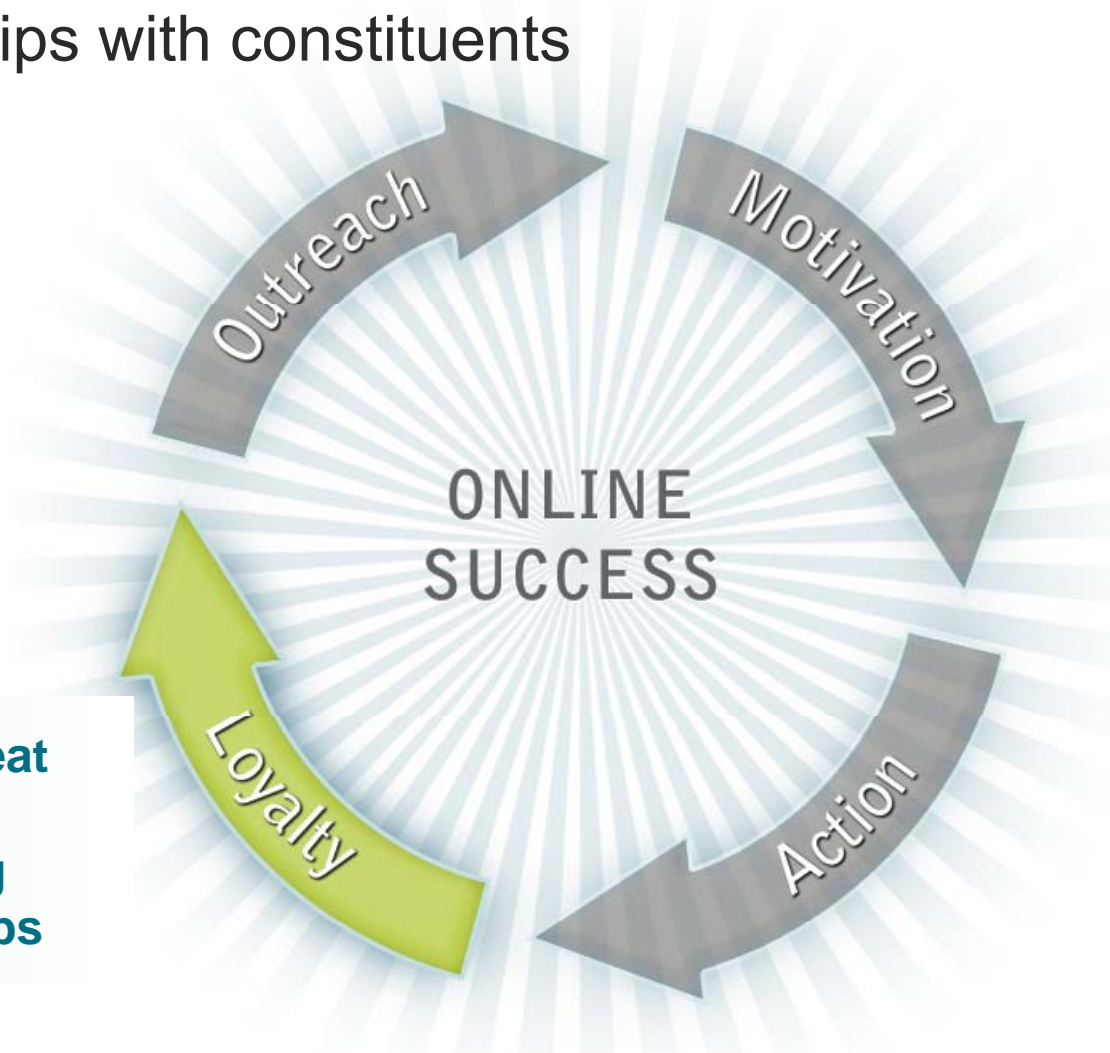
eCRM is the practice of using the Internet to build life-long relationships with constituents



Encouraging
interactive
opportunities
for engagement

Relationship Building Framework: eCRM

eCRM is the practice of using the Internet to build life-long relationships with constituents



Driving repeat visits and advancing relationships

Today's Objectives: Loyalty

At the end of today's session, you should feel empowered to:

1. Evolve your Web presence using an **iterative approach** over time.
2. Provide online content that increasingly meets the **general goals and needs** of your most important audience groups.
3. Create a more **focused online experience** based on the interests of specific constituents.



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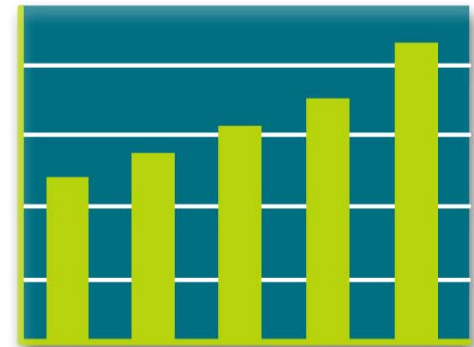
Review: *Brand* - Creating Online Identity

- Taglines and Logos
- Content
 - ▶ Clear
 - ▶ Consistent
 - ▶ Focused
- Goal Setting
- Keyword, Content, & Traffic Analysis



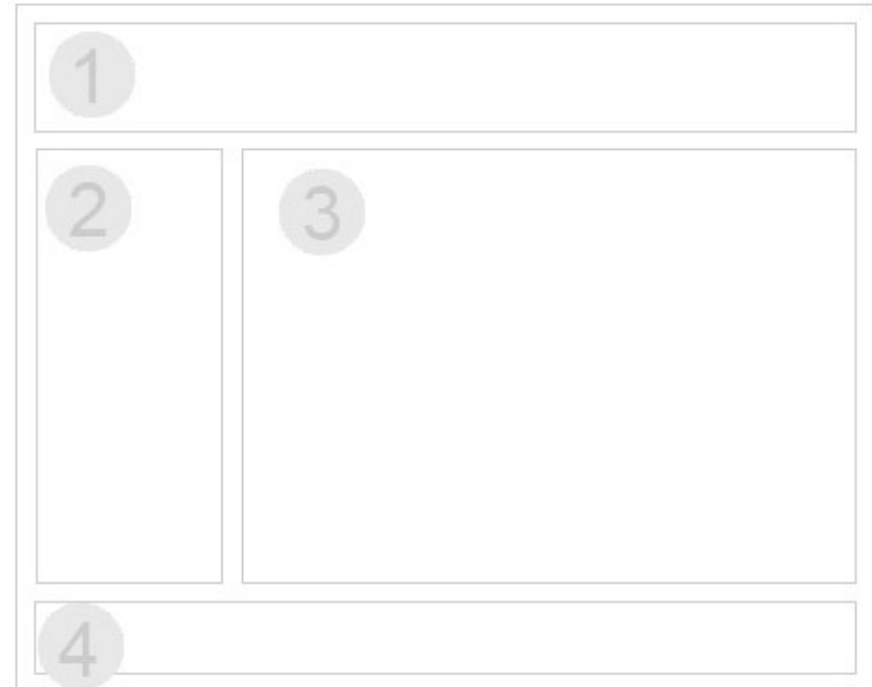
Review: *Analytics* - Measuring Effectiveness

- Tying goals to conversions
- Metrics & goal-setting
 - ▶ Traffic sources
 - ▶ Bounce rates
 - ▶ Landing pages
 - ▶ Conversion rates
- Developing core metrics
- Measuring trends across time



Review: *Homepage Design & Layout* - Communicating your Message

- Clear identity statement
- Constituent Personas
- Relationship pathways
 - ▶ Conversion opportunities
 - ▶ Welcome messages
- Navigation
 - ▶ 7 plus or minus 2
 - ▶ Progressive disclosure



Review: *Forms* - Beginning a Conversation

Text Box

First name

Radio Buttons

Gender

Male

Female

Drop-down Menu

Country

United States

List Box

Interests

Form Design

Jazz Guitar

Mountain Biking

Water Polo

Checkbox

Include me in your survey.

Button

Submit

- Forms as one turn in a larger conversation
- Deciding what to ask when
 - ▶ Keep
 - ▶ Cut
 - ▶ Postpone
 - ▶ Explain
- Measuring Form Effectiveness
 - ▶ Analyze web traffic data
 - ▶ Review form results
 - ▶ Surveys

Today: *Personalization* - Continuing the Conversation

- Two types of personalization:
 1. Understanding your **different audiences**, and providing focused content for them.
 2. Understanding the **unique interests** of specific constituents, and providing specific content for them.
- Both are important, but they each require particular listening styles and content strategies to succeed.

Iteration: Building on What Works Over Time



Today's Objectives: Loyalty

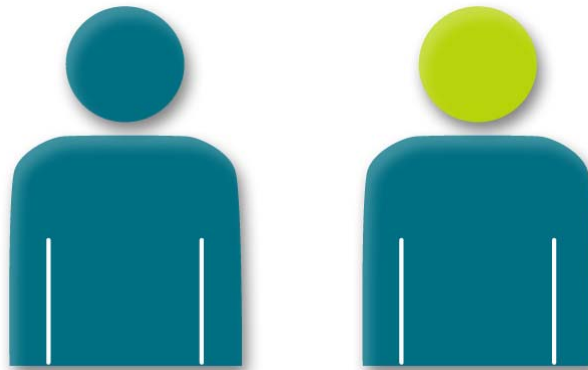
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Understanding Your Audience

- Web Analytics
- Surveys
- Secondary Research
- Direct Contact
- Formal User Research



Site Path Analysis



- Where are people coming from?
 - ▶ Search engines: what search phrases are bringing them to the site
 - ▶ Referring sites
- Where are people going on your site, and how long are they staying?
- Where are people leaving?
- Who comes back?



Search Analytics

- What search terms are people using on your site?
- Are people searching for things that should be easily findable by browsing?
- Are people searching for things that you don't currently provide?

Outcomes: Navigation updates, Quick Links, Homepage features & spotlights, Improved search functionality

Surveys

- Four questions
 1. How satisfied are you with your visit today?
 2. What was the purpose of your visit to our site today?
 - Consider providing a set of 5-7 options for people to choose from
 - Allow a free text entry to capture purposes you haven't thought of
 3. Were you able to accomplish what you set out to do?
 4. [If not] Please let us know why you were unable to complete the purpose of your visit today.

- 4Q is a free service which allows you to ask these survey questions to a specified proportion of your site visitors.

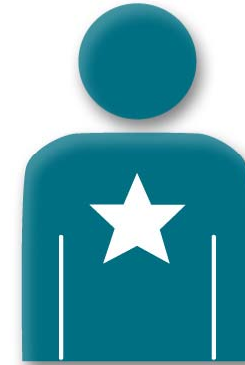
Secondary Research

- Traditional Media
 - ▶ Newspapers
 - ▶ Magazines
 - ▶ Academic Journals

- Web 2.0
 - ▶ Blogs
 - ▶ Twitter
 - ▶ YouTube
 - ▶ Social Networking Sites

Direct Contact

- “Contact Us” Emails
- Phone calls
- Audience Experts
 - ▶ Find the person in your organization with the most contact with the audience segment you’re trying to understand.



Formal User Research

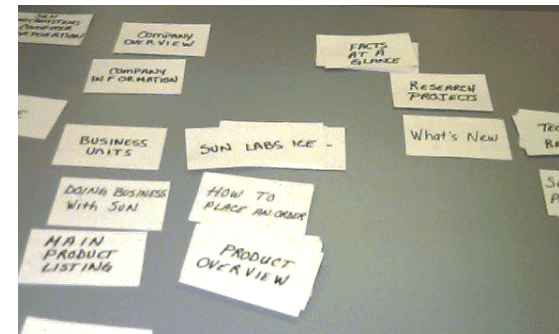
■ Interviews

- ▶ An in depth conversation with representative users about their motivations in coming to the site, their needs, and their experience when visiting the site.



■ Card Sorts

- ▶ A way to understand users' mental models of the content on your site by getting them to group the content in ways that make the most sense to them.


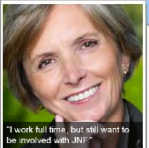


■ Usability Tests

- ▶ An opportunity to observe people using your site to accomplish key tasks

Creating Audience Segments

- The best sites focus on a set of 4-5 primary audience segments.
- Base your segments around goals and motivations, and use the results of your research to build a picture of each segment.
- Take a look at your site from the point of view of each major segment you've identified.
 - ▶ Is the site **engaging** and **relevant** for this audience?
 - ▶ Can this audience accomplish what they set out to do?

	<p>Michael</p> <p>Young Professional</p> <p>Demographic</p> <ul style="list-style-type: none"> • 24 year old male • Single • Lives in California metropolitan area • Middle income
<p>Description</p> <ul style="list-style-type: none"> • A recent college graduate, Michael is working at his first job out of college. While he does not have much money now, he comes from a middle income family. • He's never been to Israel, but would like to go sometime before he's thirty. • He has both bought and received trees in his lifetime and still does when the occasion is appropriate. He has never made a regular online donation to JNF. • While he was involved with JNF in college, he's starting to lose touch with the organization, visiting the site to purchase trees but not much else. 	
<p>Technological</p> <ul style="list-style-type: none"> • Michael spends a lot of time online, using the internet as his primary method for staying in touch with old friends, making reservations, shopping, and finding information. • He subscribes to RSS feeds, watches videos on YouTube, and has a Facebook profile. • He has a laptop, but typically uses it at a desk or work station. 	
<p>Needs</p> <ul style="list-style-type: none"> • He does not have a lot of money to donate, but is interested in getting involved in the Jewish community and local programs. 	
	<p>Martha</p> <p>Urban Mother</p> <p>Demographic</p> <ul style="list-style-type: none"> • 52-year-old woman • Married with children in their 20's • Lives in a metropolitan area • Mid-high family income
<p>Description</p> <ul style="list-style-type: none"> • Martha is established in her career and works full time, but since her children moved away, she's been looking for volunteer opportunities to keep her busy and increase her social circle. • She is an active member of the Jewish community who has traveled to Israel with JNF. • Martha also knows JNF for their Blue Box program from when her children were young and she buys trees. She loves the idea of a Jewish organization that is taking environmental action though she isn't fully aware of all of their programs and wants to learn more. 	
<p>Technological</p> <ul style="list-style-type: none"> • Since her children left for college, Martha has become much more web-savvy so she can communicate with them via email. She has taken some courses at the local university to educate her on using the web and has also started to explore some social networking sites to see what options are available for her children to start meeting other young Jewish professionals. • Martha is also an active user on the JNF site, donating often and also purchasing trees. She also has a high-speed internet connection. 	
<p>Needs</p> <ul style="list-style-type: none"> • Martha and her husband are encouraging their children to start thinking about visiting Israel soon and also to meet other Jewish young people. • Because of her passion for the environment, Martha would love to find some more specific information on JNF's environmental programs and how she can help. • Between working and volunteering, her time is limited; she needs to be able to find information and make donations quickly. Also, any local, environmental volunteer opportunities for JNF would be something she'd be interested in learning more about. 	
<p>Scenario</p> <p>Since her youngest child left home to go to college, Martha has been looking for opportunities to become more involved and give back to the local Jewish community. Although her job keeps her pretty busy, it's important that the time she does spend volunteering is well spent and for a worthy cause. Martha remembers from previous visits to the JNF site that the Jewish National Fund is active in promoting environmental initiatives, a cause that she's especially passionate about.</p>	

From Segmentation to Decision-making

Segmentation is designed to get at:

- Needs
- Goals
- Motivations
- Behaviors
- Environment

which can lead to...

- ▶ Audience-specific page or microsite
- ▶ Special navigation and pathways
- ▶ Password-protected content
- ▶ Targeted actions and opportunities

Balance between the needs of a general audience versus specific key populations

Example: U.S. Fund for UNICEF – Volunteers

The screenshot displays the website for the U.S. Fund for UNICEF, specifically the volunteer section. At the top, there is a navigation bar with the UNICEF logo and 'united states fund' text. The main navigation includes links for 'Volunteering with UNICEF', 'Advocate', 'Educate', 'Fundraise', and 'Campus Initiative'. A search bar is located in the top right corner.

The main content area features a large banner for 'Trick-or-Treat for UNICEF' with the text 'Host your own Halloween Party for UNICEF' and a link to 'Learn more about this story'. To the right, there is a 'FEATURED VOLUNTEER' section for Marcus, highlighting his 9th birthday and how he chose to give donations instead of birthday gifts. A 'VOLUNTEER LOGIN' section includes fields for 'Username:' and 'Password:', a 'Login' button, and a link for 'Why Volunteer?'. Below this is a call to action: 'BECOME A VOLUNTEER WITH UNICEF sign up here'.

The 'ACTIVITIES' section is divided into four categories: 'ADVOCATE' (writing to Congress), 'EDUCATE' (community education), 'FUNDRAISE' (creating webpages), and 'CAMPUS INITIATIVE' (supporting college students). Each category has a representative image and a brief description.

The 'IN THE NEWS' section features three news items from October 6, 2008: 'Haiti's flood-damaged schools struggle to reopen', 'Preventing a water crisis in a camp for the displaced in Georgia', and 'U.S. Fund for UNICEF announces \$1.1 million grant from the Bill & Melinda Gates Foundation'. Each item includes a short summary of the event.

On the right side, there is a 'WHY REGISTER & BENEFITS' section with the text 'Everything you need to be an effective and efficient volunteer!' and a list of benefits: 'Turn-key activity kits', 'Speaker resources', 'Community calendars', 'Online and offline fundraising tools', 'Support for Campus Initiative clubs', and 'And more!'. A 'Register here' link is provided at the bottom of this section.

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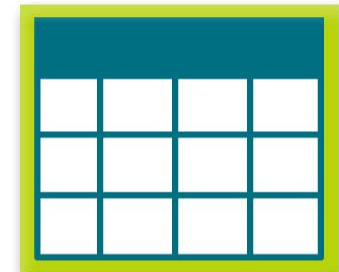


Listening to Individual Visitors

- Your visitors tell you about themselves in two ways:
 1. Explicitly – through what they **say**
 2. Implicitly – through what they **do**

What Your Visitors Say

- Web Forms
 - ▶ Donations
 - ▶ Event Registrations
 - ▶ eCommerce Purchases
 - ▶ Registration Surveys
- Can contain interest opt-ins so visitors can opt in to newsletters or email updates
- Same interests which drive email communication can be used to personalize visitors' experience on your site.



Creating Interests

- In developing a set of interests by which to segment your site visitors, look for interests which are:
 1. Distinct
 2. Relevant
 3. Orthogonal
- Some ideas for interest opportunities:
 - ▶ Issues
 - ▶ Membership in a self-selected audience category
 - Parent
 - Professional
 - Policy maker
 - ▶ Potential contributions
 - Volunteers
 - Activists
 - Event hosts

Example: Trisomy 18 Foundation Newsletter Signup

TRISOMY 18 FOUNDATION
Building a Community of Hope through Support, Advocacy, and Research

Home | Login | Register | Support Community

Username: Remember me

Not Registered? Sign up to receive eNews & Updates

What is Trisomy 18?
Diagnosing Trisomy 18
Making Decisions
Genetics for Trisomy 18
Glossary

Get Support
Parents
Expectant Parent Guide
Friends and Family
Legacy Pages
Family Profiles
Photo Album Archives

Get Involved
Donate
Events
Volunteer
Advocacy
Awareness eStore

Research
Published Research
T18 Advisory Council

For Professionals
Health Professionals
Research Professionals
Media Center

About the Foundation
Founders' Welcome
Staff
Board of Directors
Mission
Newsletter Archives

POWERED BY **CONVIO**

Quick registration

One Page Quick Registration:

The items on this page are all that is required to register, and your information will not be shared with any third parties. You will have the opportunity to update your profile with additional information at any time after registration.

Questions with an * denote required information.
If you have previously registered, please login here to prepopulate your information.

* First Name:
Middle Name:
* Last Name:
* Email:
* ZIP / Postal Code:

I am a

* I am a

- Parent of a child with Trisomy 18
- Parent of a child with possible Trisomy 18
- Family or Friend of a child with Trisomy 18
- Health Professional
- Research Professional
- Trisomy 18 Foundation Volunteer
- Member of the Press
- Student
- Other

What Your Visitors Do

- Actions can speak louder than words
 - ▶ Constituents don't always know what they'll be interested in, or don't have time to say.
- You can opt visitors in to interests based on actions taken, but be careful to honor
 1. the privacy of your constituents,
 2. their wishes/intent to receive communications from you.

What Does it Mean if a Site Visitor...

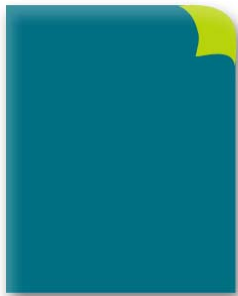
- ...donates to a campaign to fund research for a particular disease?
- ... sends out an action alert about dangerous deforestation?
- ... purchases a cat travel carrier?

Each of these actions tells you something about the visitor, and this knowledge can be used to personalize their experience on your site.

Segmenting by What You Know

- Actions taken
- Pages or content viewed
- How the visitor entered the site
- Geography
- Age
- Other Demographic facts

Delivering Personalized Content: the “How”



- Create Web and email content based upon the **interests** and **segmentation rules** you’ve developed.
- Always create **default content** for the set of visitors who are not logged in or don’t have interests corresponding to the content you’ve developed.
- Place a **conditional content block** or chunk on your page or in your navigation.

Example: U.S. Fund for UNICEF – Volunteers

The screenshot displays the website's layout with a blue header containing the UNICEF logo and navigation links: Login, Register, FAQ on Volunteering, and a search bar. Below the header is a secondary navigation bar with buttons for Volunteering with UNICEF, Advocate, Educate, Fundraise, and Campus Initiative. The main content area features a large banner for 'Trick-or-Treat for UNICEF' with the text 'Host your own Halloween Party for UNICEF' and a link to learn more. To the right, a 'FEATURED VOLUNTEER' section highlights Marcus' 9th birthday, where he gave donations instead of birthday gifts, with a link to learn about him. Further right is a 'VOLUNTEER LOGIN' section with fields for Username and Password, a Login button, and a link for Why Volunteer?. Below the banner is an 'ACTIVITIES' section with four columns: ADVOCATE (writing to Congress), EDUCATE (community education), FUNDRAISE (personal webpages), and CAMPUS INITIATIVE (college support). The bottom section is 'IN THE NEWS', featuring three news items from October 6, 2008: Haiti's flood-damaged schools, a water crisis in Georgia, and a \$1.1 million grant from the Bill & Melinda Gates Foundation. On the right side of the page, there is a 'BECOME A VOLUNTEER WITH UNICEF' call to action and a 'WHY REGISTER & BENEFITS' section listing resources like activity kits, speaker resources, and fundraising tools, with a 'Register here' link at the bottom.

Example: U.S. Fund for UNICEF – Volunteers

The screenshot displays the UNICEF U.S. Fund for UNICEF website. At the top left is the UNICEF logo and 'united states fund'. A navigation bar contains links for 'Volunteering with UNICEF', 'Advocate', 'Educate', 'Fundraise', and 'Campus Initiative'. A secondary navigation bar includes 'DONATE', 'FIELDNOTES BLOG', and 'UNICEFUSA HOME'. A search box is located in the top right corner.

The main content area features a large banner for 'Trick-or-Treat for UNICEF' with the text 'Host your own Halloween Party for UNICEF' and a link to 'Learn more about this story'. To the right, a 'FEATURED VOLUNTEER' section highlights 'Marcus' 9th birthday' with a photo of a boy holding money and a link to 'Learn about this volunteer'. Below this is a 'VOLUNTEER LOGIN' section with fields for 'Username:' and 'Password:', a 'Login' button, and a link for 'Why Volunteer?'. A large blue call-to-action box says 'BECOME A VOLUNTEER WITH UNICEF' and 'sign up here'.

The 'ACTIVITIES' section is divided into four columns: 'ADVOCATE' (with a photo of a child), 'EDUCATE' (with a photo of two women), 'FUNDRAISE' (with a photo of hands), and 'CAMPUS INITIATIVE' (with the UNICEF Campus Initiative logo). Each column contains a brief description of the activity.

The 'IN THE NEWS' section features three news items, each dated 'October 6, 2008': 'Haiti's flood-damaged schools struggle to reopen', 'Preventing a water crisis in a camp for the displaced in Georgia', and 'U.S. Fund for UNICEF announces \$1.1 million grant from the Bill & Melinda Gates Foundation'. Each item includes a short paragraph of text.

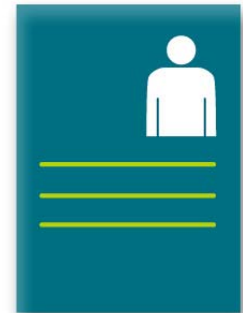
On the right side, a 'WHY REGISTER & BENEFITS' section lists several benefits for volunteers, such as 'Turn-key activity kits', 'Speaker resources', 'Community calendars', 'Online and offline fundraising tools', 'Support for Campus Initiative clubs', and 'And more!'. A 'Register here' link is provided at the bottom of this section.

Example: U.S. Fund for UNICEF – Volunteers

The screenshot shows the website for the U.S. Fund for UNICEF. At the top left is the UNICEF logo and 'united states fund'. To the right are links for 'Logout', 'FAQ on Volunteering', and a search box. Below this is a horizontal navigation menu with buttons for 'Welcome', 'What's New', 'Activities', 'Campus Initiative', 'Event Calendar', and 'Downloads'. A secondary row of buttons includes 'DONATE', 'FIELDNOTES BLOG', and 'UNICEFUSA HOME'. The main content area features a large banner for 'Trick-or-Treat for UNICEF' with the text 'Host your own Halloween Party for UNICEF' and a link to 'Learn more about this story'. To the right of the banner is a 'WELCOME, TESTER' section with introductory text and a link to 'Use any of the Featured Resources'. Further right is a 'FEATURED RESOURCES' sidebar with links to 'What's New', 'Trick-or-Treat for UNICEF Action Center', 'Tap Project Action Center', 'Advocacy Center', 'Activity Toolkits', and 'All Volunteer Downloads'. Below the banner is an 'ACTIVITIES' section with four columns: 'ADVOCATE' (Unite for Child Survival), 'EDUCATE' (online training), 'FUNDRAISE' (personal webpage), and 'CAMPUS INITIATIVE' (fundraising tools). At the bottom is an 'IN THE NEWS' section with three news items dated October 6, 2008, regarding Haiti's flood-damaged schools, a water crisis in Georgia, and a \$1.1 million grant from the Bill & Melinda Gates Foundation.

Delivering Personalized Content: Rules of Thumb

1. Start small.
2. Create a personalization plan (targeted groups, top messages, variations).
3. Don't promise interest-specific content if you're not prepared to deliver.
3. Look for chances to determine a *motivation* or *interest* based on an action.



Iteration: Building on What Works Over Time



Suggested Next Steps

Create a **personalization strategy**

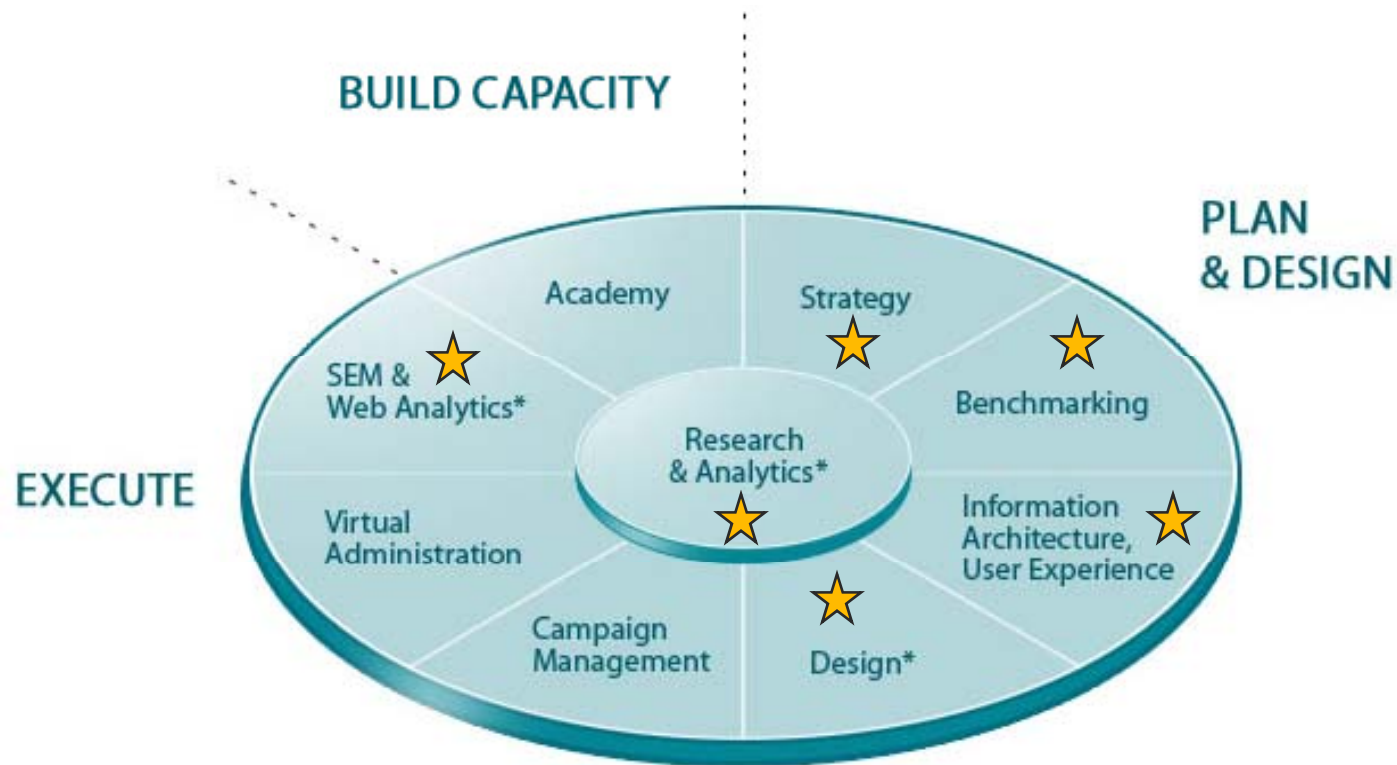
Create an **analytics plan** with goals and benchmarks

Get an **expert review** to make recommendations on your homepage, layouts, and navigation

Gain a better understanding of who your **audience** is

Where Convio CSS team can help

50+ person agency within Convio to provide clients with the strategy, interactive services and online marketing best practices to achieve ongoing success



* Utilize specialized partners



Q & A

Submit questions by clicking on the Q&A tab, typing your questions into the text area and then hitting “Ask.”

Please take a minute to answer our two poll questions about today’s session.





Thank you!

You can access the slides and recordings for this entire webinar series in our online Community at:

[http://community.customer.convio.com/
community/webinars](http://community.customer.convio.com/community/webinars)

