

How to Model Your Customer's Mind

60 Pages of Essential Tools & Concepts

Used by the MarketingSherpa & MarketingExperiments Scientists



MECLABS
INSTITUTE

[MECLABS.COM](https://meclabs.com)

M E T H O D O L O G Y

ILLUSTRATED

Case Studies

LEAD GEN

- 01** Aetna's HealthSpire
- 03** Toll Brothers
- 05** Fluke

SUBSCRIPTIONS

- 07** The New York Times
- 09** PRNewswire
- 11** CBS Sports

ECOMMERCE

- 13** Verizon
- 15** CubeSmart
- 17** Athletic Greens

OVERVIEW

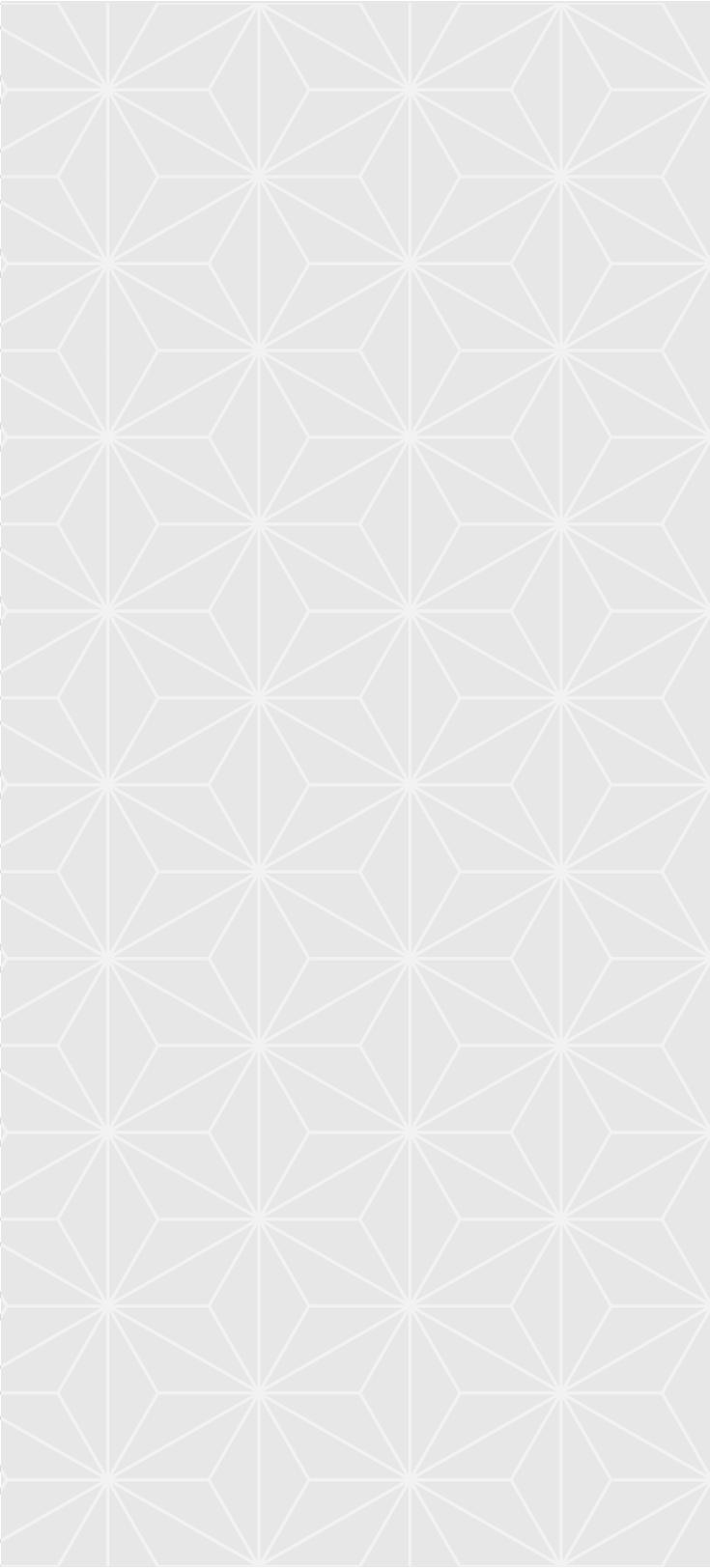
21 Essential Concepts & Tools

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METHODOLOGY ILLUSTRATED

Case Studies

LEAD GEN CASE STUDY TEST PROTOCOL 90343

Testing Perceived Value on a Landing Page

By providing emphasis on the trusted advisor value rather than overwhelming prospects with the various Medicare products and plans options, we will generate more leads and requests for calls than the control.

638% Increase in Qualified Leads

Treatments	Relative Difference
Treatment 1	638%
Treatment 2	-



CONTROL

TREATMENT

LEAD GEN CASE STUDY TEST PROTOCOL 90343

Testing Perceived Value on a Landing Page

TRANSFERABLE INSIGHT #1

Overall, we learned that HealthSpire prospects found value and were more motivated to call when they saw more detailed information about the HealthSpire team.

TRANSFERABLE INSIGHT #2

Knowing that they were going to be speaking with a friendly, young agent (perhaps resembling their children/grandchildren) based in Tennessee, may have helped them visualize how the conversation would be and reduced their anxiety.

TRANSFERABLE INSIGHT #3

During our social media research, we learned that Seniors are more inclined to engage with longer formatted content, perhaps because they have more time — this is consistent with the Treatment 1 finding.

CONTROL

TREATMENT

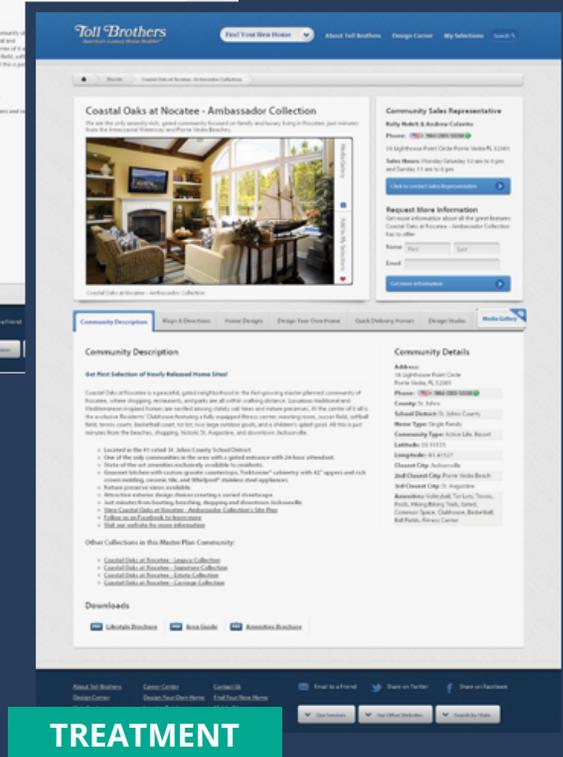
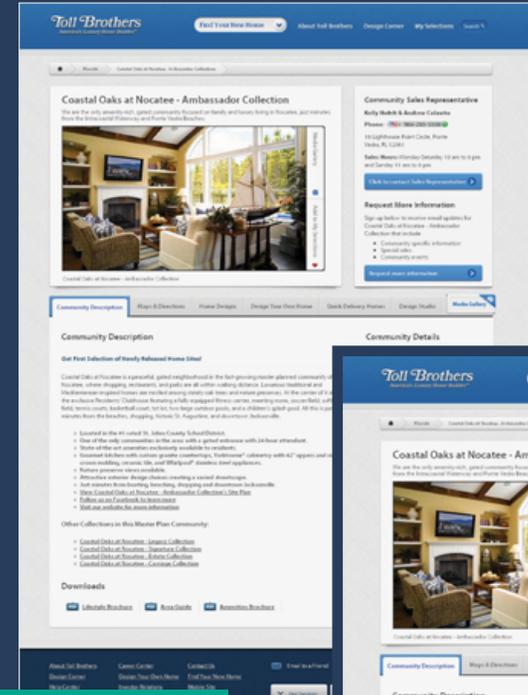
LEAD GEN CASE STUDY TEST PROTOCOL 11221

Testing Reduced Friction on Lead Capture Pages

Testing focused on optimizing lead capture pages throughout TollBrothers.com.

 **166.5%** Increase in Lead Gen

Treatments	Conversion Rate	Relative Difference
Control	0.85%	-
Treatment	2.27%	166.56%



LEAD GEN CASE STUDY TEST PROTOCOL 11221

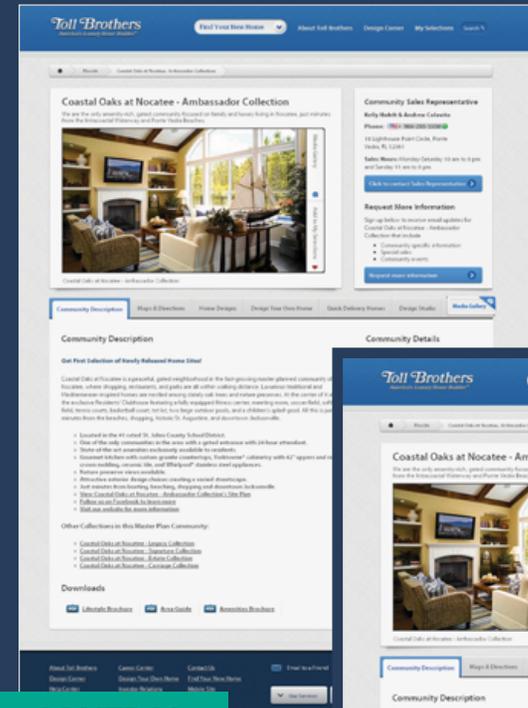
Testing Reduced Friction on Lead Capture Pages

TRANSFERABLE INSIGHT #1

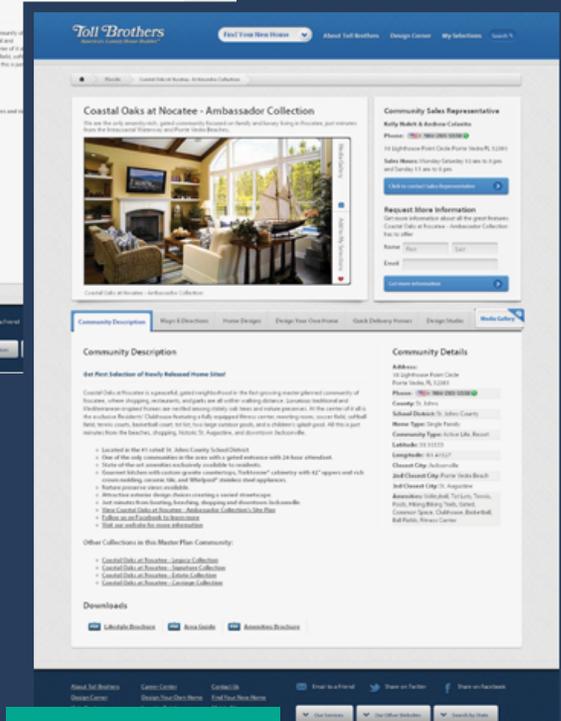
Incorporating the lead form directly onto the page and removing subsequent steps in the process reduced step friction and increased lead generation rate.

TRANSFERABLE INSIGHT #2

Copy indicating the types of email updates visitors will receive may increase anxiety. This approach may seem less personalized and more likely to result in SPAM for the visitor.



CONTROL



TREATMENT

LEAD GEN CASE STUDY TEST PROTOCOL 11441

Testing Reduced Friction & Clarifying Incentive Values

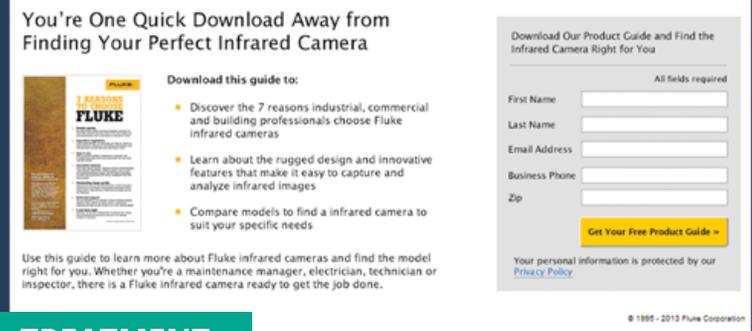
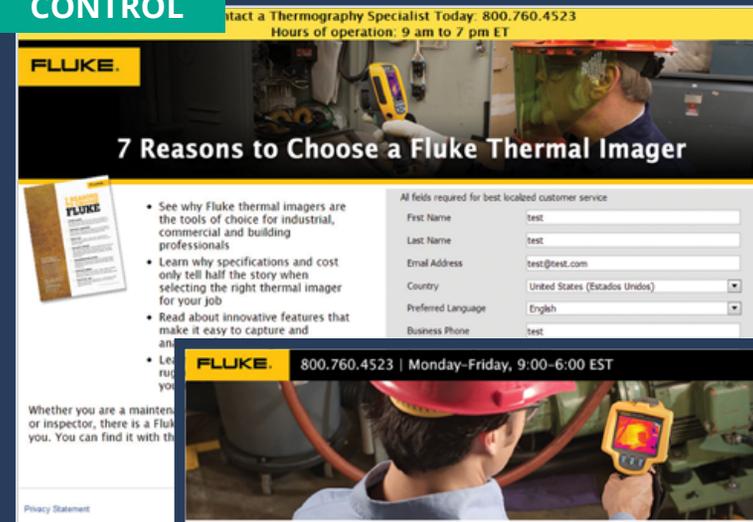
During the testing period of 15 days, 3.06% of all visitors to the control submitted the lead form compared to 6.01% on the treatment. The increase in number of leads generated led to a relative increase of 96.28%.

96.28% Increase in Lead Gen

Treatments	Lead Gen Rate	Relative Difference
Control	3.05%	-
Treatment	6.01%	96.28%



CONTROL



TREATMENT

LEAD GEN CASE STUDY TEST PROTOCOL 11441

Testing Reduced Friction & Clarifying Incentive Values

TRANSFERABLE INSIGHT #1

Reducing friction in the lead generation form and clarifying the value of the form's incentive increases the likelihood of visitors completing the form.

TRANSFERABLE INSIGHT #2

Clearly presenting the incentive as a downloadable product guide also resulted in a 169% relative increase in incentives downloaded on the thank you page.

CONTROL

Contact a Thermography Specialist Today: 800.760.4523
Hours of operation: 9 am to 7 pm ET

FLUKE

7 Reasons to Choose a Fluke Thermal Imager

- See why Fluke thermal imagers are the tools of choice for industrial, commercial and building professionals
- Learn why specifications and cost only tell half the story when selecting the right thermal imager for your job
- Read about innovative features that make it easy to capture and analyze infrared images
- Learn why the rugged design and innovative features that make it easy to capture and analyze infrared images
- Compare models to find an infrared camera to suit your specific needs

All fields required for best localized customer service

First Name
Last Name
Email Address
Country
Preferred Language
Business Phone

FLUKE 800.760.4523 | Monday-Friday, 9:00-6:00 EST

Whether you are a maintenance manager, electrician, technician or inspector, there is a Fluke infrared camera ready to get the job done. You can find it with this guide.

[Privacy Statement](#)

FLUKE 800.760.4523 | Monday-Friday, 9:00-6:00 EST

You're One Quick Download Away from Finding Your Perfect Infrared Camera

Download this guide to:

- Discover the 7 reasons industrial, commercial and building professionals choose Fluke infrared cameras
- Learn about the rugged design and innovative features that make it easy to capture and analyze infrared images
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All fields required

First Name
Last Name
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TREATMENT

SUBSCRIPTION CASE STUDY TEST PROTOCOL 10602

Testing a Multi-step Subscription Funnel

MECLABS' testing focused on the optimization of the Home Delivery acquisition funnel. While the increase in conversion was marginal, new Ajax technology, along with a multi-step purchase process, allowed the treatment to capture nearly 1,600 leads per month for future marketing efforts.

 **1,600** Sales-ready Leads Captured Monthly

Treatments	Lead Gen Rate	Relative Difference
Control	5.91%	-
Treatment	6.45%	9.00%



CONTROL



TREATMENT



SUBSCRIPTION CASE STUDY TEST PROTOCOL 10602

Testing a Multi-step Subscription Funnel

TRANSFERABLE INSIGHT #1

Increasing the number of steps in the purchase funnel led to an increase in conversion due to the reduction of friction and simplification of each step in the funnel.

TRANSFERABLE INSIGHT #2

Increasing the number of steps also allowed more granular step tracking, enabling the team to more accurately identify drop-offs between steps, and create treatments to address those areas of opportunity.

TRANSFERABLE INSIGHT #3

Capturing the email addresses of motivated visitors before the order was completed created a significant opportunity for future email campaign recovery efforts.

CONTROL



TREATMENT



SUBSCRIPTION CASE STUDY TEST PROTOCOL 11022

Reducing Friction & Clarifying Membership Value

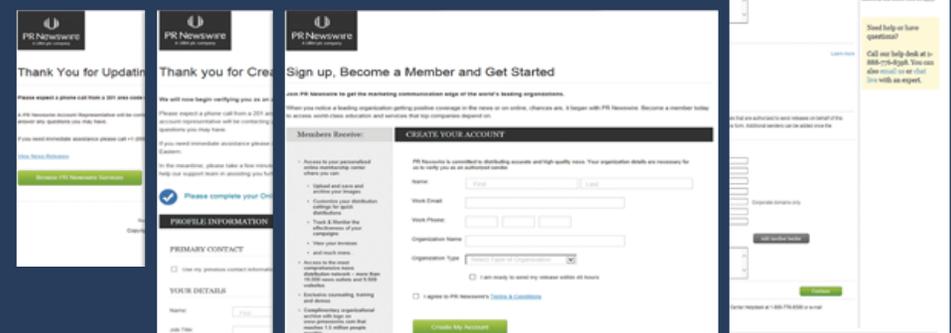
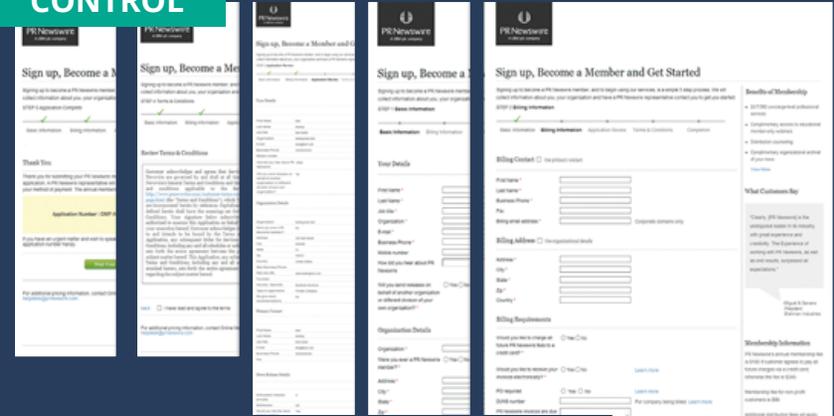
During the testing period of seven days, 12.53% of all visitors to the control submitted the Membership Application Form compared to 37.91% on the treatment. The increase in the number of applications generated a projected \$3,848,075 in additional immediate revenue over 12 months.

 **202.52%** Increase in Memberships

Treatments	Lead Gen Rate	Relative Difference
Control	12.53%	-
Treatment	37.91%	202.52%



CONTROL



TREATMENT

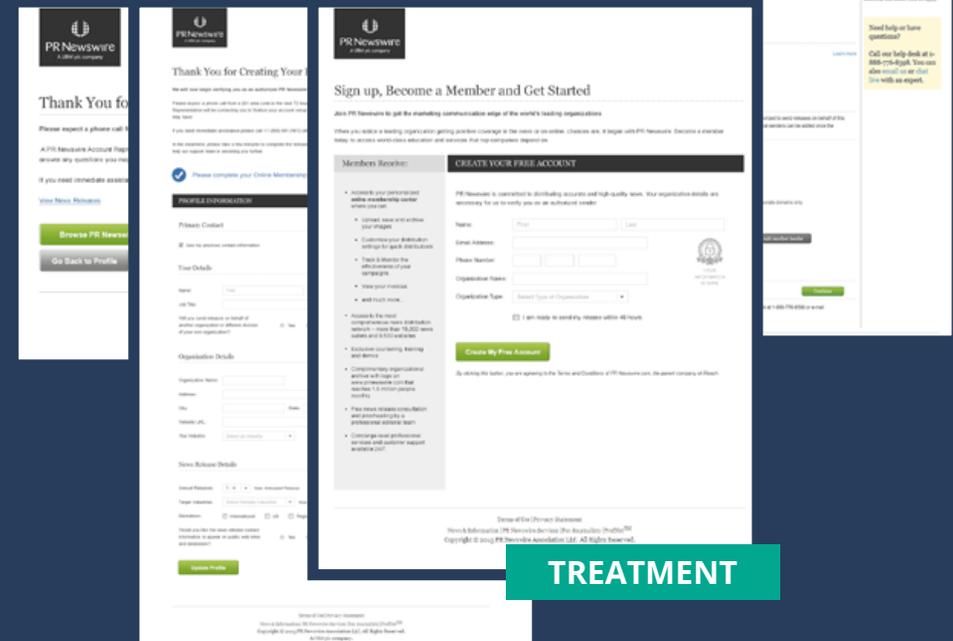
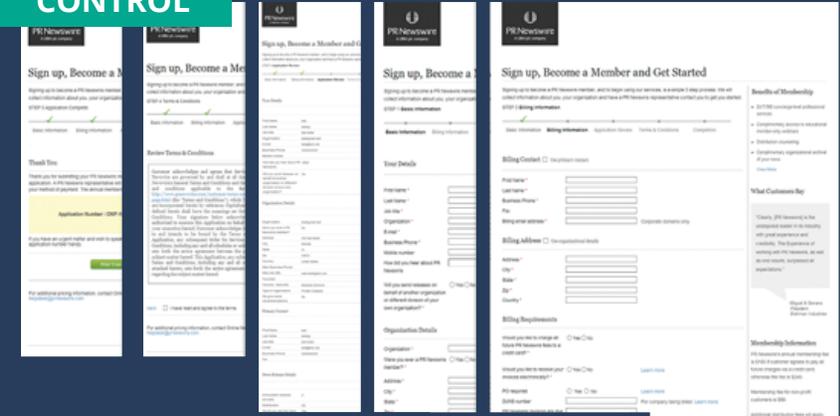
SUBSCRIPTION CASE STUDY TEST PROTOCOL 11022

Reducing Friction & Clarifying Membership Value

TRANSFERABLE INSIGHT #1

Reducing friction in the Membership Application Form and clarifying the value of the Membership increases the likelihood of visitors completing the form.

CONTROL



TREATMENT

SUBSCRIPTION CASE STUDY TEST PROTOCOL 18279

Iterative Testing Achieves Cumulative Lifts

Testing focused on optimizing three Fantasy Football game types offered for sign-ups: Free, Commissioner and Premium Games.

↑ 45.5% Increase in Clickthrough

Products	Relative Difference
Premium Games: Gold Level	17%
Premium Games: Platinum Level	93%
Premium Games: Diamond Level	13%
Premium Games: 2x Diamond Level	287%
Commissioner Games	127%



CONTROL

TREATMENT

SUBSCRIPTION CASE STUDY TEST PROTOCOL 18279

Iterative Testing Achieves Cumulative Lifts

TRANSFERABLE INSIGHT #1

Over the course of six months, CBSsports.com and MECLABS were able to extract valuable learnings about the customer theory of the Free, Commissioner and Premium Games while achieving the following accumulated lifts in conversion. All tests reached a minimum level of confidence of 95%.

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TREATMENT



ECOMMERCE CASE STUDY TEST PROTOCOL 12314

Testing Eye path on a Gridwall

Testing focused on optimizing the Basic Phones Gridwall to increase user engagement with Bazaarvoice features.

752.89% Increase in Clickthrough

Treatments	Clickthrough Rate	Relative Difference
Control	0.05%	-
Treatment 1	2.00%	288.67%
Treatment 2	4.40%	752.89%
Treatment 3	1.60%	211.86%
Treatment 4	3.70%	619.58%



The gridwall displays four variations of a product listing for a Samsung phone. Each variation includes a product image, a description, a 'Learn more' link, a star rating, and two pricing options: '\$0.99 W/ 2-YEAR CONTRACT FREE SHIPPING' and '\$6.47 A MONTH W/ EDGE FREE SHIPPING'. A 'Compare' button is located at the bottom left of each listing. Treatment 2 features a star rating of 4 stars (24 reviews) and a 'Read Reviews' link, which is highlighted as the most effective variation.

ECOMMERCE CASE STUDY TEST PROTOCOL 12314

Testing Eye path on a Gridwall

TRANSFERABLE INSIGHT #1

Adding the “Read Reviews” link led to a dramatic lift in both of the treatments. The value copy clarified that clicking through to read reviews was an option for visitors.

TRANSFERABLE INSIGHT #2

Placing the Bazaarvoice feature in the middle of the pod made it more visible to visitors, as both treatments that used the placement outperformed their respective counterparts that placed the stars below the device name.

CONTROL

TREATMENT 1

TREATMENT 2

TREATMENT 3

TREATMENT 4

ECOMMERCE CASE STUDY TEST PROTOCOL 16934

Testing Reduced Friction in a Subscription Funnel

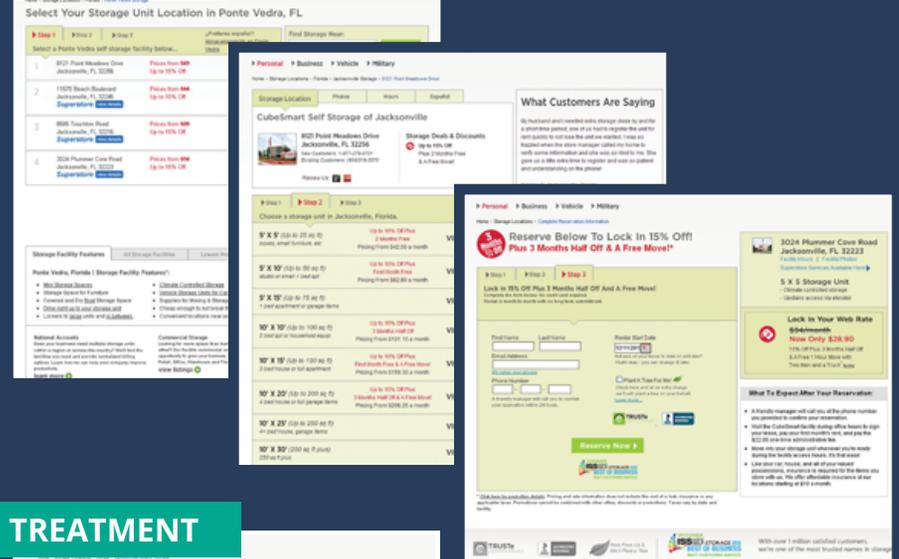
Over the duration of 23 days, the treatment produced a relative increase of 8.8% in reservation rate over the control with a 92% LOC. This resulted in a projected increase in revenue of \$3.1 million over a year.

\$3.1 Million Increase in Revenue

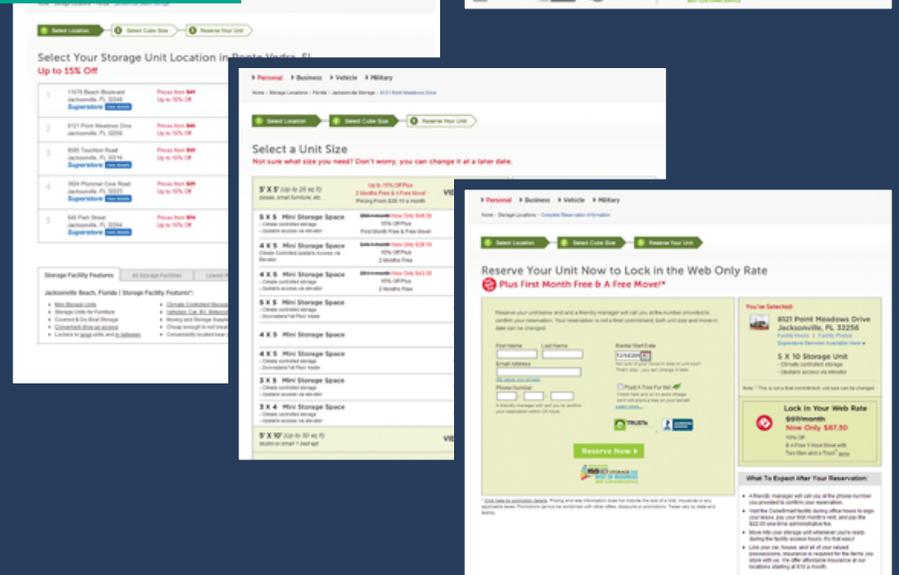
Treatments	Clickthrough Rate	Relative Difference
Control	5.23%	-
Treatment	5.69%	8.80%



CONTROL



TREATMENT



ECOMMERCE CASE STUDY TEST PROTOCOL 16934

Testing Reduced Friction in a Subscription Funnel

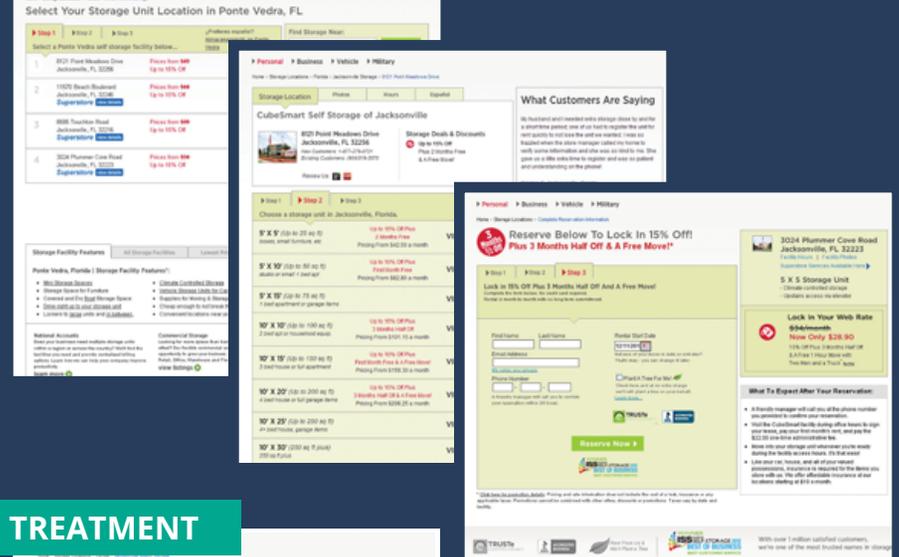
TRANSFERABLE INSIGHT #1

Incorporating the progress bar to clearly outline the reservation process reduced friction and increased online reservations.

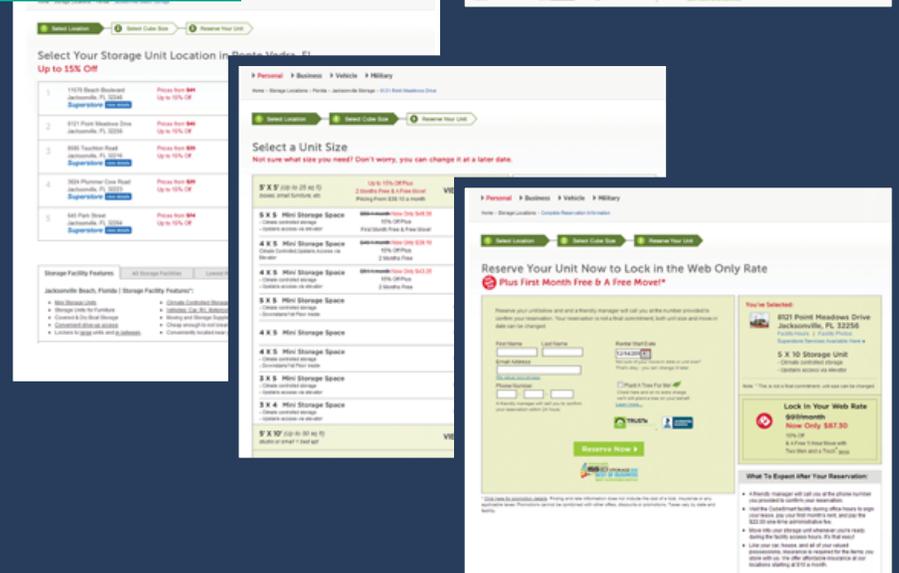
TRANSFERABLE INSIGHT #2

The treatment significantly increased step 3 completion rate by better preparing visitors for what was required at each step of the process and addressing anxiety by communicating to visitors their reservation is not a final commitment.

CONTROL



TREATMENT





ECOMMERCE CASE STUDY TEST PROTOCOL 1798

Testing Clearly Expressed Value Prop on a Homepage

Testing focused on providing clarity of value in an effort to better match prospect motivation and increase the CR of the prospects reaching the AG homepage.

 **33.37%** Increase in Conversion Rate

Treatments	Conversion Rate	Relative Difference
Control	3.3%	-
Treatment	4.4%	33.37%



CONTROL

Get Your Nutritional Insurance IN 30 SECONDS OR LESS!

ATHLETIC GREENS

ATHLETIC GREENS

- Boost Your Energy and Metabolism
- Improve Digestion and Gastrointestinal Function
- Detoxify and Alkalize Your Body at a Cellular Level
- Save Time and Money - Get It All in One Delicious Green Drink

GET UP TO 12 SERVINGS of fruits and vegetables IN JUST ONE SERVING!

LIMITED OFFER! ACT NOW!

SATISFACTION GUARANTEED

Maximize Nutrient Absorption with Athletic Greens Superfood Cocktail

Get up to 12 servings of fruits and vegetables in just one serving

- Made from 75 whole food sourced ingredients in their natural form
- Contains probiotics and enzymes for optimal nutrient absorption and digestion
- Carefully formulated by doctors and nutritionists to deliver essential nutrients
- 10+ years of research to develop an easy to mix powder with naturally sweet taste



TREATMENT



ECOMMERCE CASE STUDY TEST PROTOCOL 1798

Testing Clearly Expressed Value Prop on a Homepage

TRANSFERABLE INSIGHT #1

By better expressing the value proposition through the copy, the treatment homepage not only increased conversion by 33.77%, but also increased the overall revenue per order by 39.95% at a 97% level of statistical confidence

CONTROL

Get Your **NUTRITIONAL INSURANCE** IN 30 SECONDS OR LESS!

ATHLETIC GREENS PREMIUM SUPERFOOD COCKTAIL

- ➔ Boost Your Energy and Metabolism
- ➔ Improve Digestion and Gastrointestinal Function
- ➔ Detoxify and Alkalize Your Body at a Cellular Level
- ➔ Save Time and Money - Get It All in One Delicious Green Drink

GET UP TO **12 SERVINGS** of fruits and vegetables IN JUST ONE SERVING!

LIMITED OFFER! ACT NOW!

SATISFACTION GUARANTEED

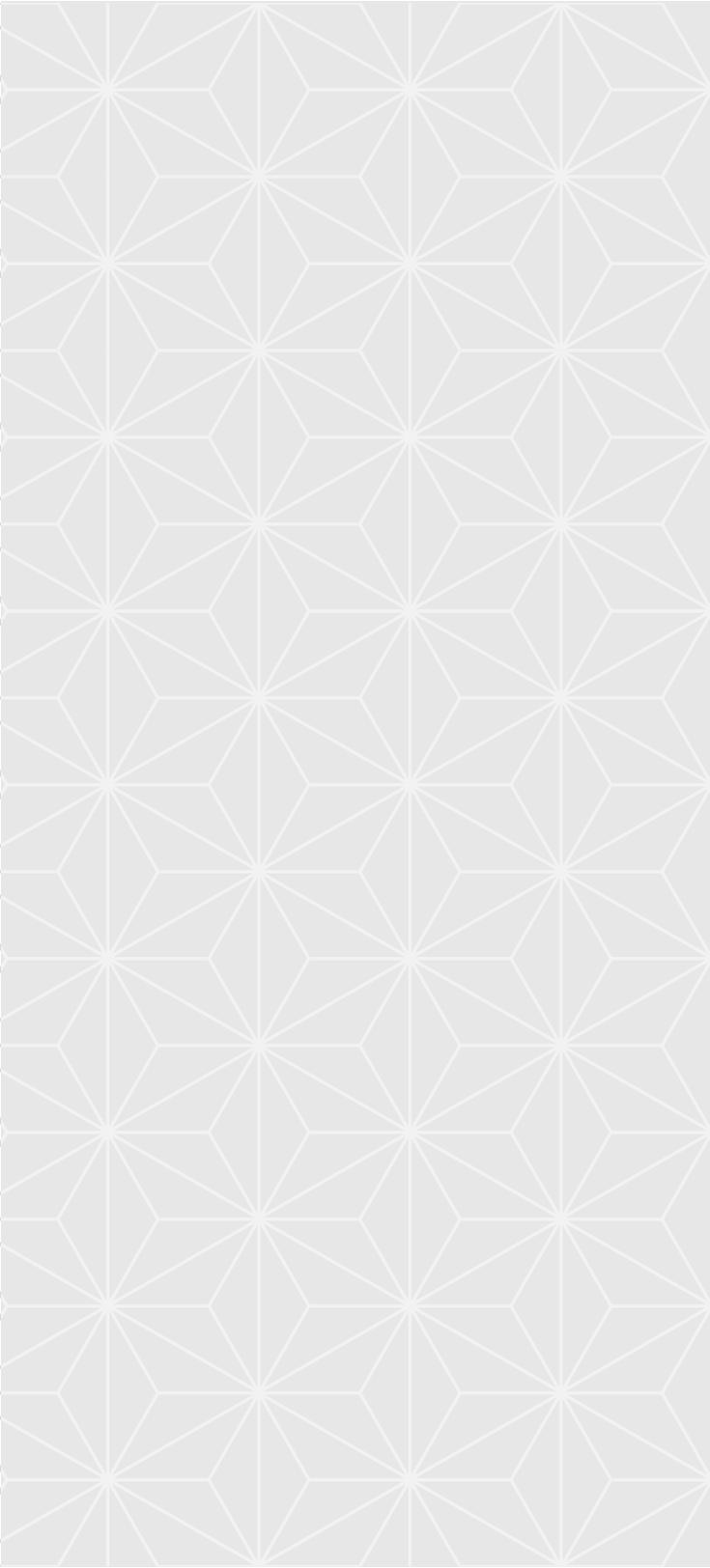
Maximize Nutrient Absorption with Athletic Greens Superfood Cocktail

Get up to 12 servings of fruits and vegetables in just one serving

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- ➔ Contains probiotics and enzymes for optimal nutrient absorption and digestion
- ➔ Carefully formulated by doctors and nutritionists to deliver essential nutrients
- ➔ 10+ years of research to develop an easy to mix powder with naturally sweet taste



TREATMENT



METHODOLOGY OVERVIEW

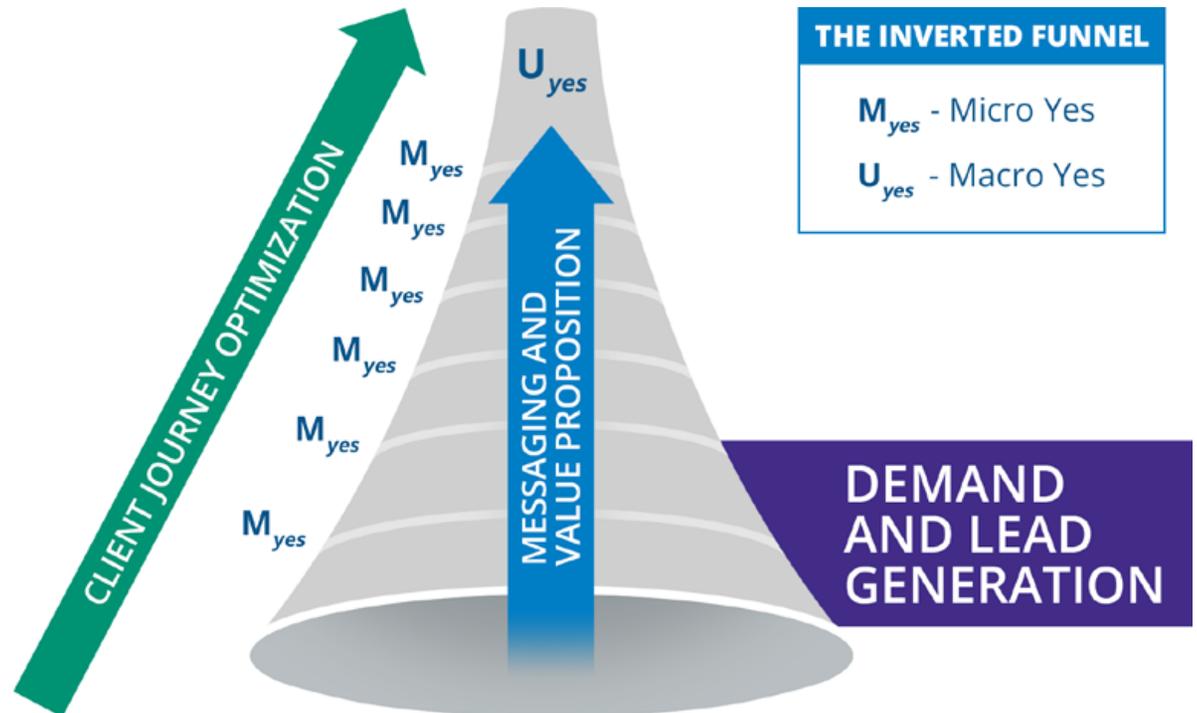
21 Essential Concepts & Tools

UNDERSTANDING HOW AND WHY CUSTOMERS SAY “YES”

The 20 years of research our team of data scientists has conducted has reshaped and validated our approach to the consumer decision-making process.

- Our research shows that we must provide value and get a “yes” at each micro-decision, or it will be a “no” at the final macro-decision.
- Through customer research and testing, we can define the customer thought sequence on the path to conversion and optimize that sequence, which results in more people saying “yes.”

“People are not falling into our funnel; they are falling out. We therefore need to see the funnel in a new way — the funnel itself must be inverted.”

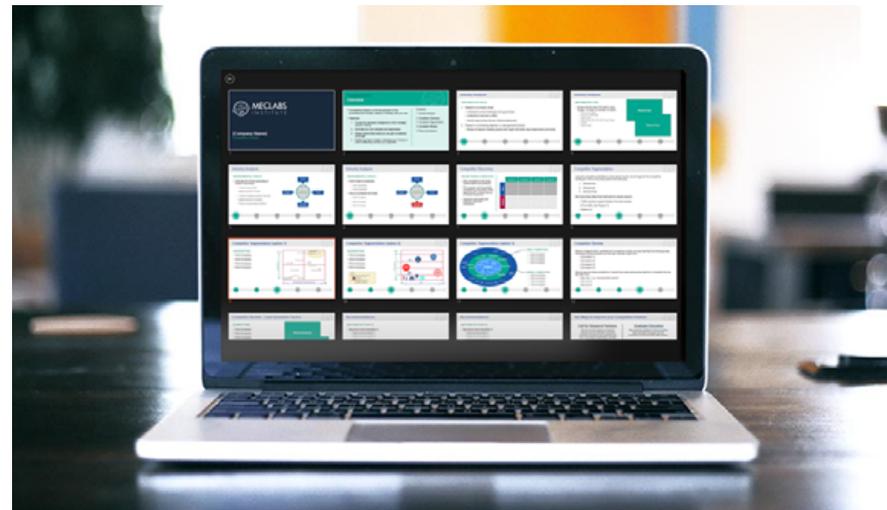


COMPETITIVE ANALYSIS TEMPLATE

A PowerPoint template to help you discover and evaluate your competitors

How to analyze:

- ▶ Which companies are competing for the same attention, interest and clicks
- ▶ How competitors express their value proposition
- ▶ How the competition's value proposition compares to the research partner's value proposition
- ▶ What revenue driving strategies competitors are not doing that we can take advantage of



[Download the Template Instantly](#)

DEVELOPING YOUR CUSTOMER THEORY

AN INTERACTIVE WORKSHEET FOR GATHERING CUSTOMER WISDOM

OVERVIEW: The Importance of Customer-First Marketing

This simple, interactive worksheet template is designed to help your marketing team, agencies and other stakeholders and partners collaborate and get alignment. You can use it to provide clarity on who your customers are, what they want (even when it doesn't directly relate to your product), and in what context they view your marketing messages.

In many cases, we don't take the time or have the methodology to get aligned. When what we ask of customers is disconnected from what they desire and truly need, our marketing investments will underperform even with the most creative executions. When agencies and brands understand customers better, they serve those customers better, thereby improving bottom-line business results.

Use this simple template as your guide to help increase customer intimacy. Share it with your entire marketing and agency ecosystem along with key business stakeholders and partners from product development to customer service to manufacturing, and ultimately create customer-first marketing that resonates with your customers and increases the probability of conversion.

GETTING STARTED

You can see a sample to the right to help you begin, or you can visit MarketingExperiments.com/CustomerTheory to learn about how the MECLABS Institute team applied this basic tool to help create a video for a nonprofit focused on helping find missing children.

The image displays three overlapping screenshots of a worksheet titled "DEVELOPING YOUR CUSTOMER THEORY CONTINUED".

- Top Screenshot (PRE-WORK):** Includes a field for "Your Organization or Brand:", a section for "Your Unique Customer Profiles:" with a 9-item list, and a quote: "Specificity converts. Indeed, for any reasonable sample size, the specific offer to the specific person will outperform the general offer to the general person" - Flint McLaughlin from the book 'Vandalist as Philosopher'.
- Middle Screenshot (STEP 1):** Includes a field for "Select Customer Profile:", a section for "Established Customer Insights:" with a 6-item list, and a question: "What attributes have you already confirmed about...".
- Bottom Screenshot (STEP 2 CONTINUED):** Includes a section for "Common Fears" with a 12-item list and a question: "What are your customers' unspoken fears and anxieties?".

PRE-WORK

Your Organization or Brand:

A brand with an overly broad value proposition can't powerfully impact every possible customer. You need to delineate who you can, and can't, serve. Then create a prospect-level value prop for each customer profile.

"Specificity converts. Indeed, for any reasonable sample size, the specific offer to the specific person will outperform the general offer to the general person"

- Flint McGlaughlin

from the book 'Marketer as Philosopher'

Your Unique Customer Profiles:

(Identify as many distinct profiles as necessary)

1

2

3

4

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6

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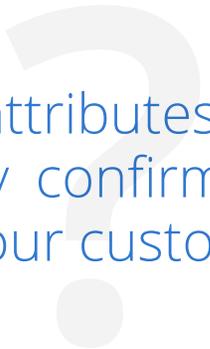
10

STEP 1

Select Customer Profile:

(Select one from Pre-work)

Customer Theory is not developed in a vacuum. What insights can you leverage from your team's previous campaigns and analytics? What are you sure you already know about this customer?



What attributes have you already confirmed about your customer?

Established Customer Insights

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

STEP 2: Attributes

All customers are part of several groups, whether they choose to be or not. (Later in this step, we'll get into the groups customers choose to be a part of.) Demographic information includes their location, age, gender, marital status, income, etc. Standard first- and third-party data can help you get a better understanding of what groups your prospective customers are in. While focusing segmentation and messaging solely around demographic information increases the likelihood of making a poor connection with the customer, combining demographic information with other info in this tool can help you increase your customer understanding.

Demographic Characteristics

- 1
- 2
- 3
- 4
- 5
- 6
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- 8
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- 10
- 11
- 12

STEP 2 CONTINUED: Context

How will prospects experience your offer, marketing message or product, etc? What does their world look like? This is a surface-level understanding of their daily interactions. Next, in the tool, we'll explore a deeper look at what actually drives them to act.

For context, think of stimuli that could aid or prevent you from capturing potential customers' attention. This includes both internal and external stimuli — elements that relate directly to your product and sales path that you can control, and elements that are outside of your sales path and you can't control. This helps you remember that the marketing messages you focus on and look at in a vacuum are just a small slice of a customer's life.

For example, if you run a radio advertisement, what do prospects hear before your advertisement? What do they hear after it? What are they doing during it? Where are they? In a car? At home? Working? Alone? With others? Understanding these elements can impact your creative choices when choosing where to advertise and what marketing messaging to use.

Contextual Characteristics

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STEP 2 CONTINUED: Common Desires

Now go a step deeper...

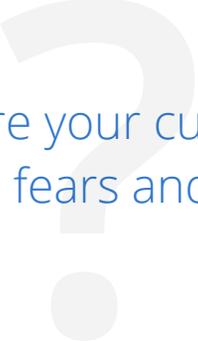
You've explored externally identifiable characteristics when looking at demographics, but how do your unique prospective customers see themselves? What are your customers' goals, dreams, hopes and aspirations? What inspires them? Think beyond your product. Think about your customers as wellrounded, complex people who have lives outside of your product as well. For example, "I want to be seen as a rock star dad" is not necessarily related to your product, but how your brand taps into that desire is how you generate an appealing offer, headline, advertisement, etc.

What Customers Move Toward

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- 2
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- 11
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STEP 2 CONTINUED: Common Fears

Now, for the opposite of desire. What are your customers' pain points, concerns, anxieties and worst-case scenarios? The unspoken and unquestioned fears can be conversion killers, yet often go unasked. By better understanding them, you can address their anxieties with your marketing copy and policies (like a generous return policy) before your customers consciously perceive these fears. For example, if you sell services or software in a B2B environment, your prospect may subconsciously ask, "This product or service seems good, but is my team even capable of getting its full value?" To address this anxiety, you might show case studies of similar-sized organizations that have found success with your product or service.



What are your customers' unspoken fears and anxieties?

What Customers Move Away From

- 1
- 2
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- 10
- 11
- 12

STEP 3: Unanswered Questions

The previous steps provide a systematic way for you to pull all the insights from your current data and marketing team. Now, what else would you like to know about your customers? If you could learn one thing, what would you want to learn? Two things? For example, the ideal ecommerce bookstore would only include one book — the exact book that would be perfect for that specific customer. If you could perfectly tailor your marketing message, you would achieve almost perfect conversion. It is almost impossible to get to that level of perfection, but what other information about the customer would help you get closer? What would have the most impact should you learn it?

Unanswered Questions About the Customer

- 1
- 2
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- 12

TEST PLANNING SCENARIO TOOL

This simple tool helps you visualize factors that affect the ROI implications of test sequencing

- ▶ See the financial differences between different testing sequences
- ▶ Change the way you think about test sequencing
- ▶ Use this analysis as an example for your team, business leaders, or clients to demonstrate the potential returns of running tests with different levels of effort in different sequences
- ▶ Visualize the elements that go into running a test, and how a shift in timing can affect ROI

The image shows a tablet displaying a spreadsheet titled "Determining the Optimal Testing Sequence Calculation Sheet" by MECLABS INSTITUTE. The spreadsheet is organized into six rows, each representing a different sequence of three treatments. Each row has columns for "Revenue", "Duration", and "ROI". The data is color-coded, with red, yellow, and green cells. A white pen is resting on the bottom right of the tablet.

Sequence	Treatment 1	Treatment 2	Treatment 3	Revenue	Duration	ROI
Sequence 1	Treatment 1	Treatment 2	Treatment 3	100,000	100,000	100,000
Sequence 2	Treatment 2	Treatment 1	Treatment 3	100,000	100,000	100,000
Sequence 3	Treatment 3	Treatment 1	Treatment 2	100,000	100,000	100,000
Sequence 4	Treatment 3	Treatment 2	Treatment 1	100,000	100,000	100,000
Sequence 5	Treatment 1	Treatment 3	Treatment 2	100,000	100,000	100,000
Sequence 6	Treatment 2	Treatment 3	Treatment 1	100,000	100,000	100,000

[Download the Tool Instantly](#)

THREE HEURISTICS

TO HELP YOU OPTIMIZE YOUR PAGES, EMAILS AND ADS

MECLABS Institute has developed **10 patented heuristics**, or thinking tools, to help organize one's thinking and analysis of a given product offering, marketing message or experimental design.

- These heuristics are not equations to be solved. But rather, they are thought tools (kind of like checklists) to guide your thinking as you optimize your advertising, email and websites.
- The more you improve the elements on the right side of the equation, the more you will be able to increase the effectiveness of your ads, email messaging and website conversion.



1. Effective Ad Heuristic

Achieve qualified clicks by grabbing attention, generating interest and having a clear ask.

$$EA = 2at + i + as$$

[Related Resource: How to improve conversion of your online ads](#)

2. Email Messaging Heuristic

Optimize positive forces of your email and minimize negative forces to drive more traffic to your website.

$$EME = rv (of + i) - (f + a)$$

[Related Resource: Email messaging online certification course](#)

3. Conversion Sequence Heuristic

Once visitors arrive on your website, maximize your success rate with the Conversion Sequence Heuristic.

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

[Related Resource: Landing page optimization online certification course](#)

EFFECTIVE AD HEURISTIC

3 COMMON MISTAKES MARKETERS MAKE WITH THEIR ADS

MISTAKE #1. The ad doesn't attract attention

As mentioned earlier, the first objective your ad must fulfill is **attracting attention (at)**. You'll see the importance of this by looking at the coefficient of 2 used with the "attract attention" variable. Attracting attention bears the most weight in the sequence because if visitors don't notice your ad, then little else will matter.

$$EA = 2at + i + as^c$$

There are five relative differentials you can use to help your ad stand out against other elements on a page:

1. Size
2. Shape
3. Color
4. Motion
5. Position

Remember, less can be more. If you emphasize your ad using all of these differentials, you are essentially emphasizing nothing at all.



Use of color to attract attention

MISTAKE #2. The ad lacks enough value to generate interest

So you've gotten your customers' attention, but why should they click? You build **interest (i)** through expressing value.

$$EA = 2at + i + as^{\text{©}}$$

Every action you ask a prospect to make must have a value proposition. This is what we refer to as a process-level value proposition. Think of it like this:

"Why should my ideal prospect **click this banner ad** rather than any other element on the page?"

There are four elements you can evaluate to measure the force of a value proposition:

- Appeal – How badly do I want this offer?
- Exclusivity – Where else can I get this offer?
- Credibility – Can I trust your claims?
- Clarity – What are you actually offering?

No value proposition presented



MISTAKE #3. The ad doesn't ask for the click ... the right click

Many marketers and designers become so wrapped up in the design of the ad that they overlook a critical piece: **“the ask” (as).**

$$EA = 2at + i + as^{\text{©}}$$

You need to make sure you're asking for the click, whether it's implied or direct. Also, you must ensure visitors know what they're getting in exchange for the click. Will they be able to learn more? Buy now? Use your call-to-action to set visitors' expectations.

But, it's not about just any “ask.” You need to know where visitors are in your purchase cycle so you can match “the ask” to the motivation of the ideal visitor.

If customers are new to your company or product, they might still be in the research phase.

- That means an ad asking them to “buy now” could result in no click.
- However, an ad that asks them to “learn more” addresses the needs the visitor has concerning your product or service.

AD WITH CALL-TO-ACTION BUTTON



LANDING PAGE



EMAIL MESSAGING HEURISTIC

POSITIVE FORCES THAT IMPACT EMAIL MESSAGING EFFECTIVENESS

On the positive side, you must ask yourself, “How **relevant (r)** is my email to my customer? How valuable is the **offer (of)**? How strong is the **incentive (i)** to take action?”

$$\text{EME} = rv (\text{of} + i) - (f + a)^{\text{©}}$$

This is why target audience testing is so effective. What is relevant and valuable to one customer on your list might not be to another customer.

By better targeting your offers and incentives to tap into what different segments of your list find relevant and valuable, you will improve the effectiveness of your email messaging. Testing can help inform this process.

Five Ideas to Increase your Emails' Perceived Value

- 1 Turn your email into a personal note, not a promotion
- 2 Personalize subject lines
- 3 Implement personalized send times (for example, one send time might work differently for @gmail.com and @company.com)
- 4 Provide personalized content in purchase confirmation emails
- 5 Write copy that connects to the recipient's problem and create suspense that you have the answer on a landing page

NEGATIVE FORCES THAT IMPACT EMAIL MESSAGING EFFECTIVENESS

Those positive forces drive your customer to act. You can think of them like the propulsion of an airplane. But much like drag, negative forces, the **friction (f)** elements of the process and **anxiety (a)** about providing information, discourage your customer from converting.

$$\text{EME} = rv (\text{of} + i) - (\text{f} + \text{a})^{\text{©}}$$

EXAMPLE #1: Friction caused by excessive calls-to-action

This email had the following subject line: *Fares from \$39* are so low, you just have to go*

- At first, recipients will be excited that this company is presenting such a great offer.
- However, when they open and scroll for the \$39 deal, they must work hard to find it.
- In fact, the \$39 deal was the 40th call-to-action in the email.
- Scanning through 40 offers and 40 buttons creates both difficulty and length-based friction for the recipient.



EXAMPLE #2. How to use email tone to alleviate anxiety in your sales process

Active Network, a large event management software provider, partnered with MECLABS Institute to increase its conversion and free trial sign-up rates.

Our analysts hypothesized that:

Visitors are not converting because of high anxiety due to phone spam and high-pressure salesmen.

To alleviate this hypothesized anxiety, they tested an abandonment email that directly addressed this issue:

I noticed that you started the process of getting free access to RegOnline but weren't able to finish. Are you concerned about giving out your phone number? Are you worried about high pressure sales tactics or mandatory contracts?

We believe our product sells itself, so we're just here to provide you with whatever assistance you need in getting your event up and running - in whatever way works best for you. We promise NEVER to sell or misuse your information.

Call me direct at 1-800-XXX-XXXX and I can help get you rolling. If you'd rather just try again online, [use this link instead](#).

Thank you in advance for your trust!

Sincerely,

[Name of Representative]
Customer Service Representative
[RegOnline](#)
Direct: 1-800-XXX-XXXX ext. XXXX
[\[name\]@RegOnline.com](mailto:[name]@RegOnline.com)

349% 
RELATIVE INCREASE IN
INQUIRY RATE

[🔗 Related Resource: How a change in tone increased lead inquiry by 349%](#)

CONVERSION SEQUENCE HEURISTIC

A PROVEN APPROACH TO IMPROVING YOUR WEBPAGES AND PURCHASE PROCESSES

Determining the elements in your conversion process to test and optimize can be challenging. The MECLABS Conversion Sequence Heuristic provides a framework of five factors on which to focus your optimization energy.

- It brings discipline, rigor and sustainable success to the marketing department.
- It's a patented, repeatable methodology (patent number 8,155,995).
- It's based on years of testing and research of real product and service offers presented to real customers.

CONVERSION – STRATEGY IS BETTER THAN SKILL

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

Optimization doesn't start with the Conversion Sequence Heuristic. It starts with determining the best objective — what is the right “macro-yes” to apply your resources to? Once you've answered this, the heuristic is a way to answer the next question: “What is the best way to achieve the objective?”

We call this thinking Q1 and Q2.

Q1 *What is the best objective?*

Q2 *What is the best way to achieve the objective?*

MOTIVATION – WHO ARE YOU OPTIMIZING FOR?

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

The numbers in front of the different elements of the heuristic indicate how much they impact the probability of conversion. All of the elements do not hold equal weight. The motivation of the user (m) is the single most important factor affecting conversion.

Motivation of the user is also the only element of the Conversion Sequence Heuristic that you cannot change. It is intrinsic to your potential customers.

You can, however, gain an understanding of your potential customers' motivations to better tap into those natural motivations and better serve your ideal customers while improving conversion.

Once you've removed friction & anxiety and increased the force of your value proposition, you can use motivation to maximize the effectiveness of your marketing message with segmentation.

Five Questions to Ask to Understand Motivation

- 1 Where is your customer in the thought sequence?
- 2 Where is the traffic coming from?
- 3 What conclusions do your prospects need to make before buying?
- 4 What are their pain points?
- 5 What do they value?



Maximize your optimization efforts by leveraging data to identify the motivation of your prospects.

METRICS THAT OFTEN INDICATE AMOUNT OF MOTIVATION

CONVERSION RATES

If conversion rates are high in general, it indicates a high degree of motivation. Also, if conversion rates are minimally impacted by significant changes, it indicates a high amount of motivation.

CLICKTHROUGH RATES

Like conversion rate, a high clickthrough rate can also indicate high motivation. However, excessive clicks can also indicate confusion.

AVERAGE ORDER VALUE

Beyond conversion and clicks, a higher average order (or donation) value often indicates a high degree of motivation.

PRICE ELASTICITY

If conversion rates are minimally impacted when price is raised, it also indicates a high amount of motivation.

CHANNEL EXPOSURE

If the source of your traffic indicates awareness of previous marketing exposure/brand awareness, it often indicates a high amount of motivation.

METRICS THAT OFTEN INDICATE NATURE OF MOTIVATION

CLICKTHROUGH TRACKING (NEXT-PAGE REPORTS)

Knowing which page the customers clicked to can indicate which content is most in line with their motivation.

CHANNEL SOURCE

Knowing the page or pages that customers are coming from can often indicate what is motivating them.

TIME-ON-PAGE

Often, noticing how long visitors spend on a particular page can provide insights into what is motivating them in particular. Beware that a high time-on-page can also indicate confusion.

EVENT REPORTS

Setting up tracking on particular actions (like watching a video) enables you to understand the nature of customers' motivation by observing what they did (or did not do) on the page.

RETURN FREQUENCY PERCENTAGE

Knowing how many times visitors have come to a particular page (possibly even prior to converting) is helpful in understanding the nature of their motivation.

Every action customers take in response to a given marketing message is a window into two key aspects of their motivation:

AMOUNT – How much are they actually motivated?

NATURE – What is actually powering their motivation?

VALUE PROPOSITION – MAXIMIZE THE FORCE OF YOUR PERCEIVED VALUE

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

There are four elements that increase or decrease the force of your value proposition:

APPEAL	How badly do I want this offer?
EXCLUSIVITY	Where else can I get this offer?
CREDIBILITY	Can I trust your claims?
CLARITY	What are you actually offering?

Your value proposition is the answer to the question, “If I am your ideal prospect, why should I buy from you rather than any of your competitors?” This requires you to differentiate from the value propositions of competitors.

Where “appeal” and “exclusivity” meet is your “only-factor.” Marketers can improve their messaging efforts by clearly communicating (clarity) the “only-factor.”

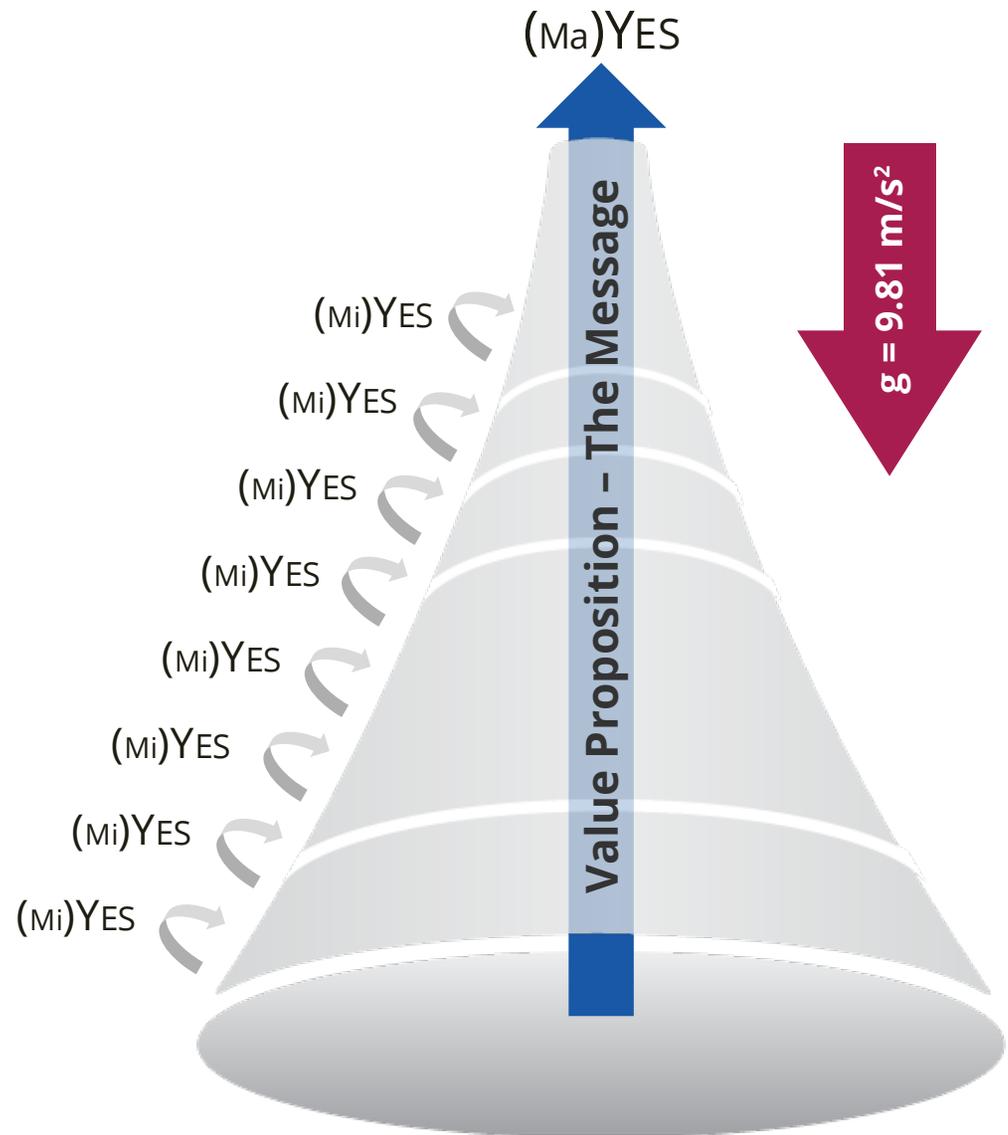


VALUE PROPOSITION AS THE FUNDAMENTAL FORCE

Value proposition is the fundamental force powering your prospects up the sales funnel.

People don't make a single decision. They move up the funnel through a series of smaller decision points that require them to say "yes." These are micro-yes(s). If at any point along the process your potential customer says "no," you will not achieve your goal.

At each decision point, or micro-yes juncture, your prospects are weighing the perceived value of the action you're asking them to take versus the perceived cost.



THE VALUE PROPOSITION SPECTRUM



To have the most powerful value proposition, you have to develop derivative value propositions:

- **Prospect-level** Value Proposition
- **Product-level** Value Proposition
- **Process-level** Value Proposition

[🔗 Related Resource: The 4 essential levels of value propositions](#)

It is necessary to create a robust value proposition that addresses every stage of the sales process so that prospects quickly and easily move through it.

Every request made of prospects in the sales funnel must be supported by its own value proposition because prospects are asking themselves, consciously and subconsciously, whether it's worth their time and effort to move forward.

INCENTIVE AND FRICTION – A PSYCHOLOGICAL RESISTANCE TO A GIVEN ELEMENT IN THE SALES PROCESS

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

In any conversion process, there are cost factors that go beyond the actual money spent on a product or service. Friction is one of the cost factors (indicated by the minus sign in front of the letter “f” in the Conversion Sequence Heuristic).

Friction is the “aggravation factor,” or the hoops the customer must jump through to complete the conversion goal — everything from a large number of form fields to long shopping cart processes. Friction in the sales process consists of two components:

Friction = Length + Difficulty

LENGTH-RELATED FRICTION

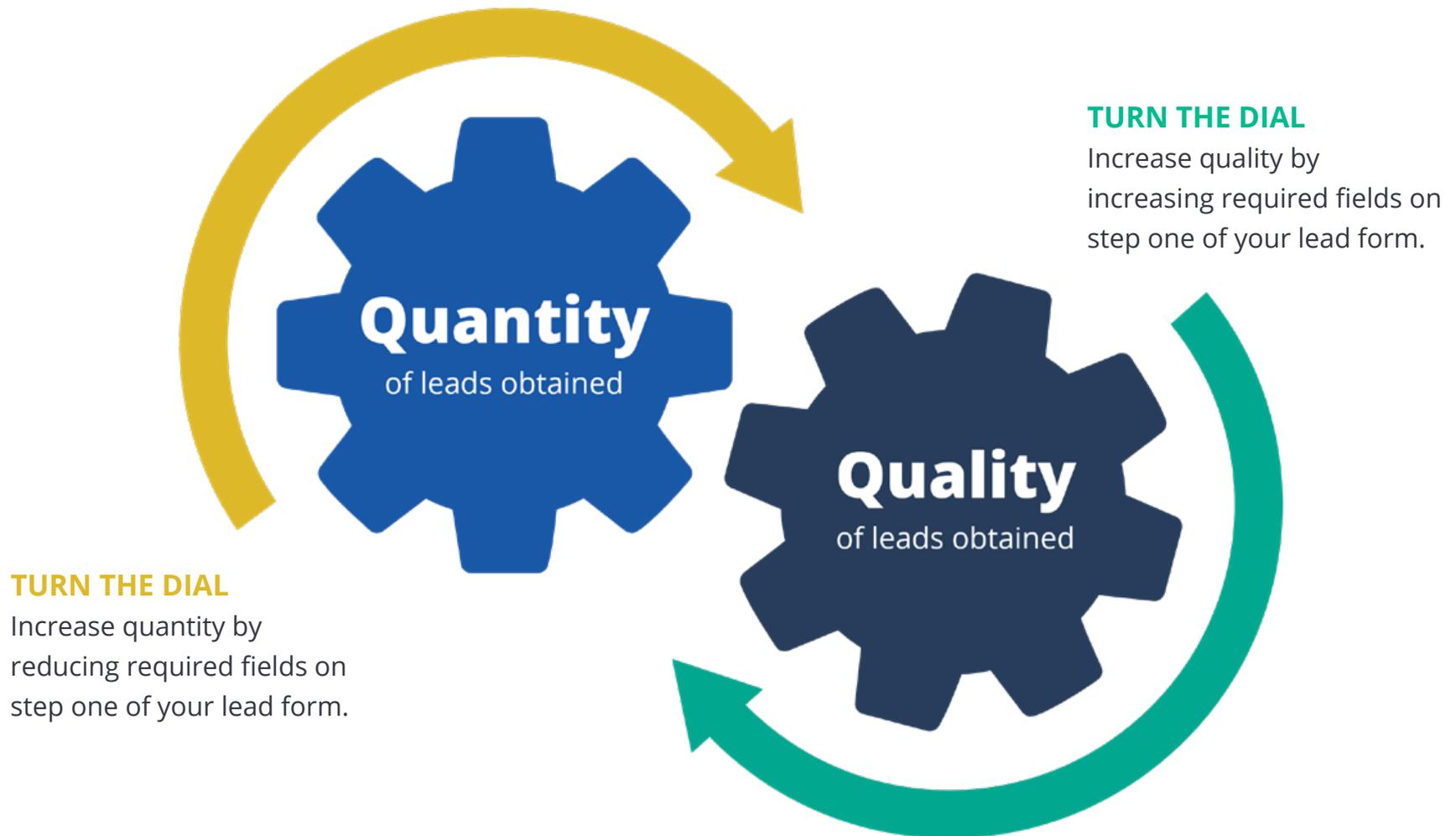
Relates to fatigue, irritation or aggravation caused by forms or processes that ask for more time or information than feels reasonable to the prospect

DIFFICULTY-RELATED FRICTION

The result of website elements that cause confusion or require an undue amount of effort to complete, such as asking for a spouse’s driver’s license number

USING FRICTION TO YOUR ADVANTAGE

Length-oriented friction can be used to control the quantity and quality of the emails or leads you capture.



WHEN TO USE INCENTIVE

Incentive is a positive element in the heuristic that is used to offset any friction you cannot eliminate. The key to incentive is choosing one with a high Perceived Value Differential (PVD) — the difference between the perceived value of the incentive and the actual cost of the incentive.

ANXIETY – A PSYCHOLOGICAL CONCERN STIMULATED BY A GIVEN ELEMENT

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

Anxiety is just as lethal to conversion as friction.

Anxiety is the concern ideal prospects have that the checkout process might not be secure or that your product might not actually deliver on its promises. Anxiety can stop website visitors in their tracks — the back button makes it ultra-easy.

If you think about mitigating anxiety in rational terms, you are likely to fail in your efforts. Though anxiety often is stimulated by a legitimate concern, its degree/impact is often disproportionate to the measure of risk.

THERE ARE THREE DIFFERENT LEVELS YOU CAN SEEK TO RELIEVE OR CORRECT ANXIETY



PROXIMITY

After you've found a way to specifically address every source from which a customer could experience anxiety, you have to figure out where to place these anxiety reducers on your page. Proximity is about placing the corrective measures you formed with specificity in places where a visitor will experience them simultaneously with the source of anxiety.

INTENSITY

The intensity level of corrective measure must address two things: the substance and the perception of the concern. The substance requires you to address the rational foundation of an anxiety source on a realistic view of risk.

SPECIFICITY

In order to counteract customer anxiety, you must first identify the source of the anxiety and effectively address each concern. Depending on the website, different sources of anxiety will arise for the visitor. The source may be quality, reliability, price, security, etc.

A screenshot of a payment form. At the top right, a blue callout box contains the text "Is my credit card information safe?". Below this, the form includes a message: "You will not be charged until you make a purchase." and a link: "If the billing address of your payment information is not in the United States, click here". The "Payment Method" section shows radio buttons for "Credit Card" and "PayPal". Under "Credit Card", there are icons for VISA, MasterCard, Discover, and American Express. Below these are input fields for "Card Number", "Security Code" (with a "What is this?" link), and "Expires" (with dropdown menus for "1" and "2010").

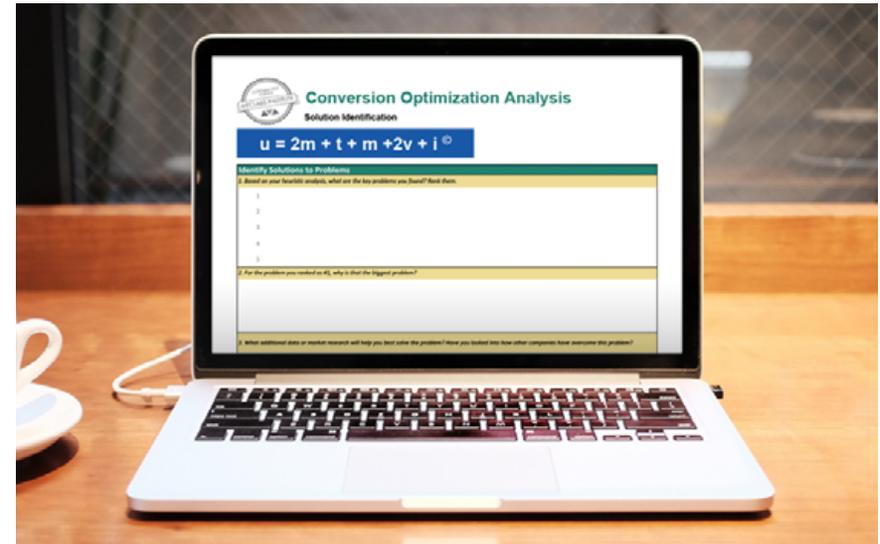


What if I am not happy with my purchase?

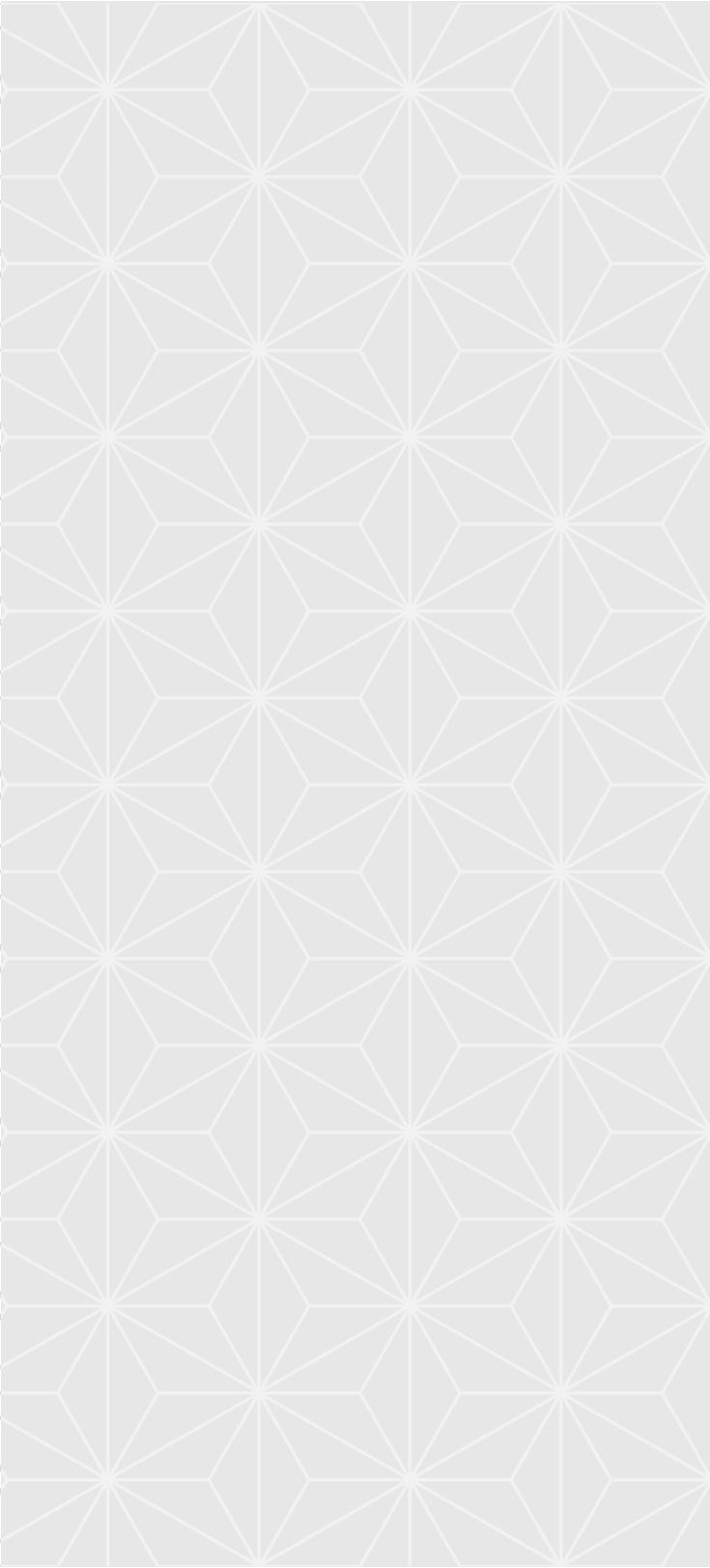
CONVERSION ANALYSIS TOOL

An Excel tool for diagnosing the problems in your funnel and determining where to test

- ▶ Direction on choosing the best test objective and opportunity
- ▶ Step-by-step guidance on diagnosing the problems in your marketing funnels
- ▶ A rigorous process of defining treatments, variables and metrics for testing
- ▶ Helpful links for each section to assist your forward progress



[Download the Tool Instantly](#)

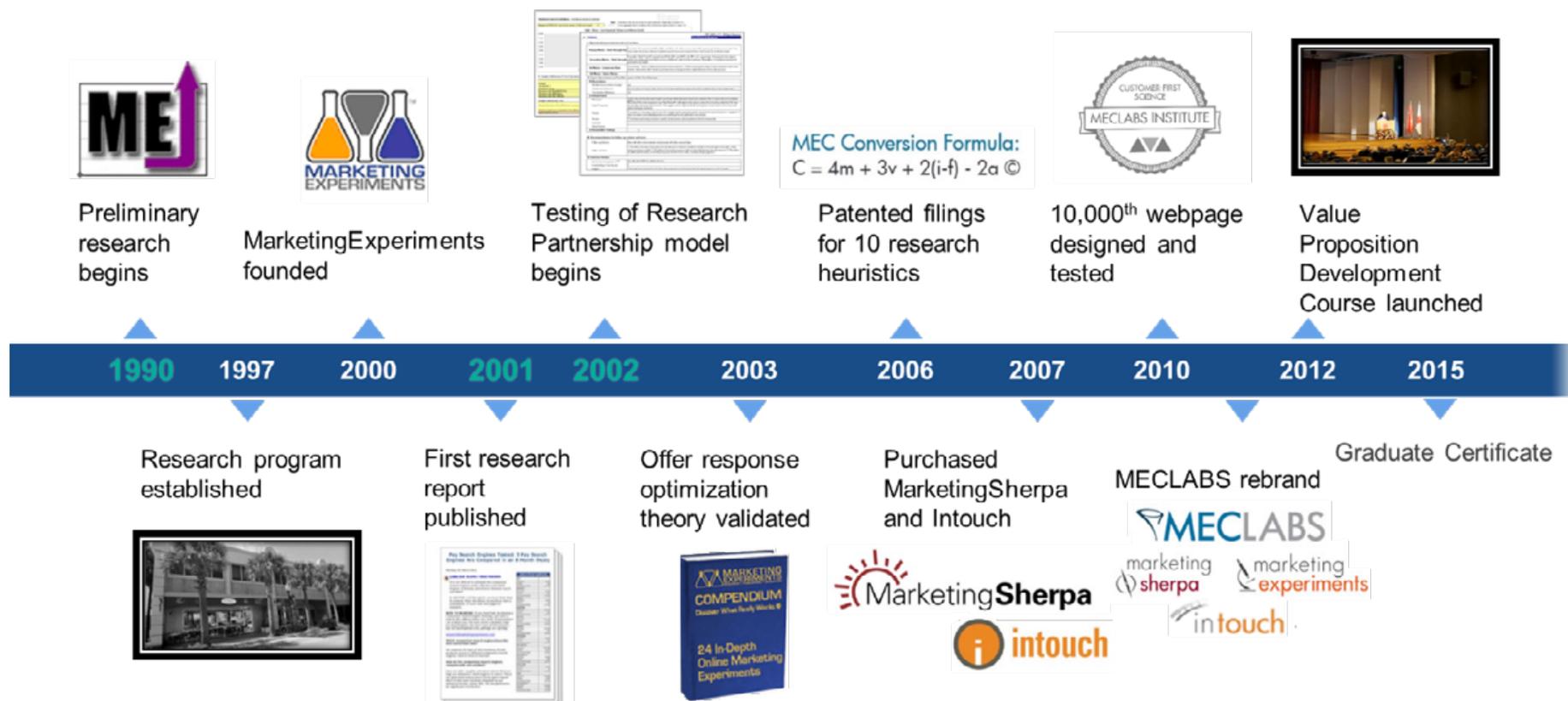


METHODOLOGY IN PRACTICE

Overview of Services

ABOUT THE MECLABS INSTITUTE

25+ years ago, MECLABS built the first internet-based behavioral research program. Their research partnerships with organizations like **The New York Times**, **Amazon** and **Google**, helped set many of the industry standards in testing, optimization and digital marketing.



MECLABS SERVICES

To support their ever-expanding research program, MECLABS has developed a series of science-based agency services, including:

- ▶ **Customer Research & Conversion**
- ▶ **Website Development & Design**
- ▶ **Product Creation & Launch**
- ▶ **Value Proposition & Brand Work**

MECLABS has conducted these science-based agency services in countries around the world spanning from Australia to Japan. They have worked with small startups and with many of the Fortune 50 leaders.

Now, with the world's largest independent research program in the field, their library includes:

20,000 **EXPERIMENTAL TREATMENTS**

2,500 **BRAND-SIDE CASE STUDIES**

500,000 **EXECUTIVE INTERVIEWS**

37,000 **BENCHMARKED COMPANIES**



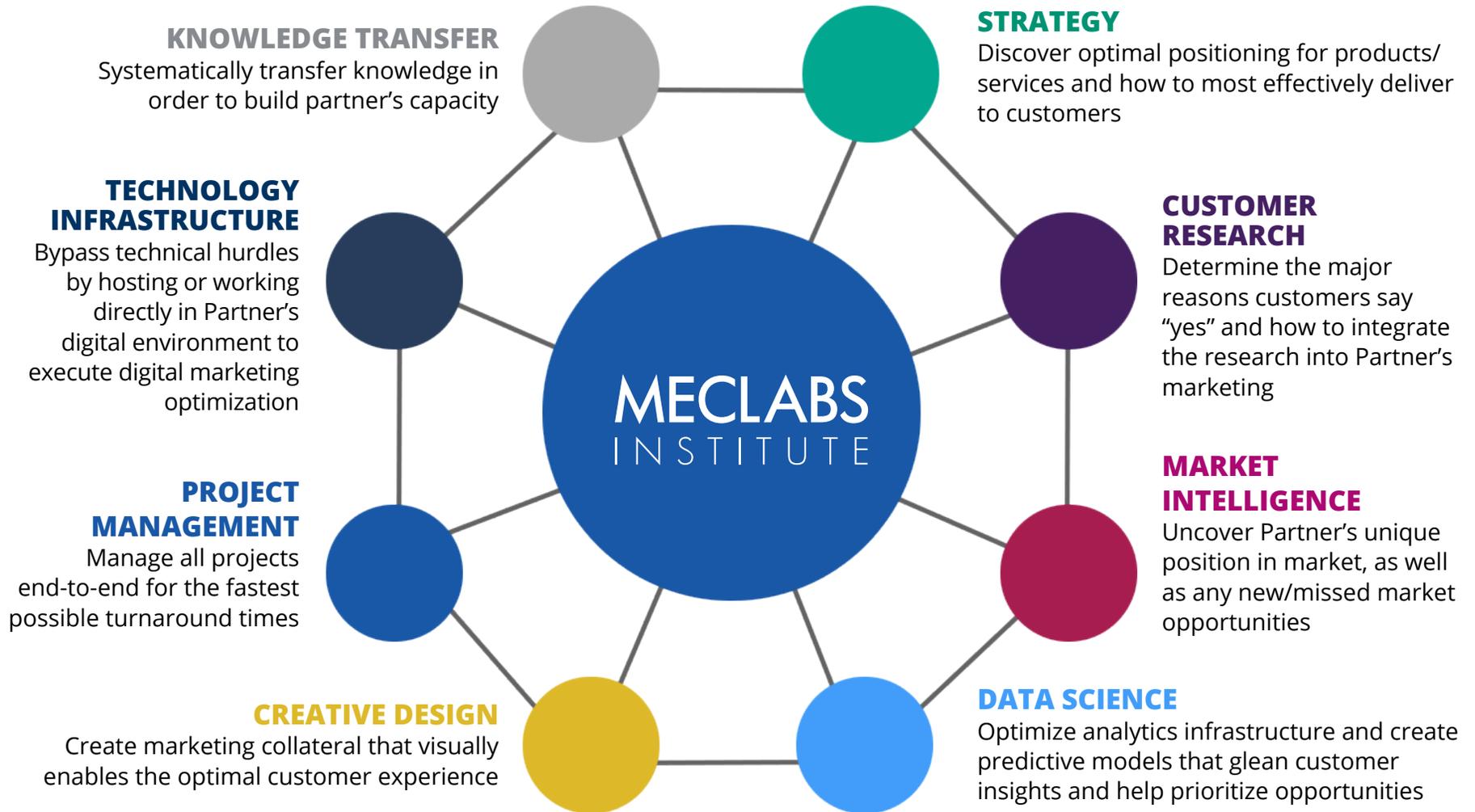
Learn how the **MECLABS Services Team** can help you get inside your customer's thinking & drive breakthrough results

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EMAIL Services@MECLABS.com

PHONE **1.904.813.7000**

AN OVERVIEW OF OUR SCIENCE-BASED SERVICES



How Aetna's HealthSpire startup generated 638% more leads for its call center

by **Daniel Burstein**, Senior Director, Content & Marketing, MarketingSherpa and MECLABS Institute

SUMMARY

Marketers have several assumptions.

Long form pages don't work. Call center employees should be measured by average time of call. Try to sell any customer that comes your way.

We recently interviewed Denis Mrkva, General Manager, HealthSpire, a startup within Aetna. He shared with us how he is challenging assumptions like these, and generating a big increase in leads in the process.

Denis Mrkva, General Manager of HealthSpire, recently visited MECLABS Institute (parent research organization of MarketingSherpa), and we had the opportunity to interview him about an interesting landing page experiment that was in progress at the time. Denis also shared what happened after the landing page — namely, how he staffs and runs a call center that truly provides value to customers.

An abbreviated 5-minute version of the video interview



[Continue to read full case study](#) ►

THE CUSTOMER

HealthSpire is a subsidiary of Aetna, a \$63 billion managed health care company founded in 1853. HealthSpire serves Americans 65 and over with Medicare, Medicare Advantage and Medicare Supplement insurance plans. It also offers ancillary products for dental, vision, cancer, heart attack and stroke.

HealthSpire also serves two other groups with its marketing — individuals who have yet to turn 65 but are beginning to research Medicare products and children or caregivers of people who are or will soon be eligible for Medicare.

CHALLENGE

About 18 months ago, HealthSpire created a landing page to get potential customers to learn more about Medicare through a phone or chat conversation and, ultimately, register for Medicare plans.

“Our hypothesis was that we want to have something that’s short and not confusing. What we were afraid of was that more information will create more confusion, resulting in a negative outcome. So we decided to go with a first control version, simple, just outlining products we have without going in depth. And giving them a chance to contact us via phone, schedule a call or chat with us,” said Denis Mrkva, General Manager, HealthSpire.

However, a few months after launching the page, Mrkva’s team realized that it wasn’t working.

Creative Sample #1: Original landing page

HealthSpire™

We're here to help.

Finding the right Medicare plan is simple with HealthSpire™ exchange. Whatever your needs, our expert staff will be happy to answer your questions and help guide you through enrollment. Get started any way you choose:

- Call us**
Speak with a helpful TeleAdviser
M-F 9am-6pm CST.
(844) 321-0934
- Have us call you**
Set up a time and we'll call you when it's good for you.
Schedule a call >
- Chat with us**
Type your questions and get answers M-F 9am-6pm CST.
Start a new chat >

What does HealthSpire offer?

We are a licensed insurance agency here to serve you and help you find the right Medicare plan for your needs. Keep reading if you'd like to learn more about what we offer before talking to us:

- Medicare Advantage Plans**
Medicare Advantage Plans are sometimes called Medicare Part C or MA plans. They're an alternative to Original Medicare. They may also cover extra services, like dental services or wellness programs. You might get prescription drug coverage through these plans, too.
- Prescription Drug Plans**
Medicare Prescription Drug Plans, also called Medicare Part D Plans, are designed for people with Original Medicare. You might also want a Medicare Part D Plan if you're on medication.

(Click the image above to see it enlarged in browser)

“And then, I was fortunate to be referenced to MECLABS [Institute] and Flint [McGlaughlin] by my manager. And when we started talking to MECLABS, the lights went on. A light bulb went on.”

- Denis Mrkva

“I realized that this discipline that MECLABS has in actually understanding the relevant content, understanding the audience that we want to service, understanding the products, is the way to go,” Mrkva said.

“So we engaged with MECLABS to create a new set of landing pages that are actually focused on how a consumer would like to interact with us, and especially they’re very targeted [to] consumer segments who may not be that digitally savvy,” he explained.

The team analyzed the current HealthSpire landing page and identified a problem: It had a lack of credibility hurting its primary-, process-, and product-level value propositions required to build trust with potential customers and create a perceived value in speaking with a HealthSpire agent.

After all, most customers are not excited about getting on the phone with an agent or a sales rep. They must first understand the value of that conversation to overcome the anxiety of a sales call, in addition to the time and effort they would invest in such a conversation.

CAMPAIGN

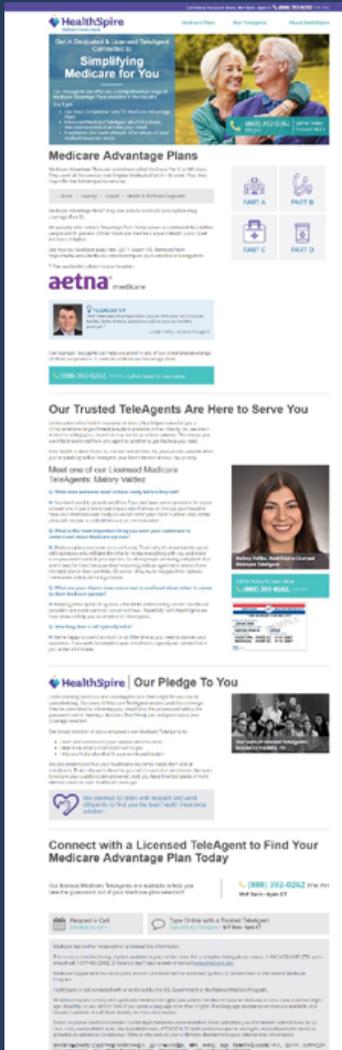
Based on that analysis, the team created the following research question:

Will the addition of primary and product-level value, coupled with the emphasis of value on a “Trusted Advisor,” drive additional calls?

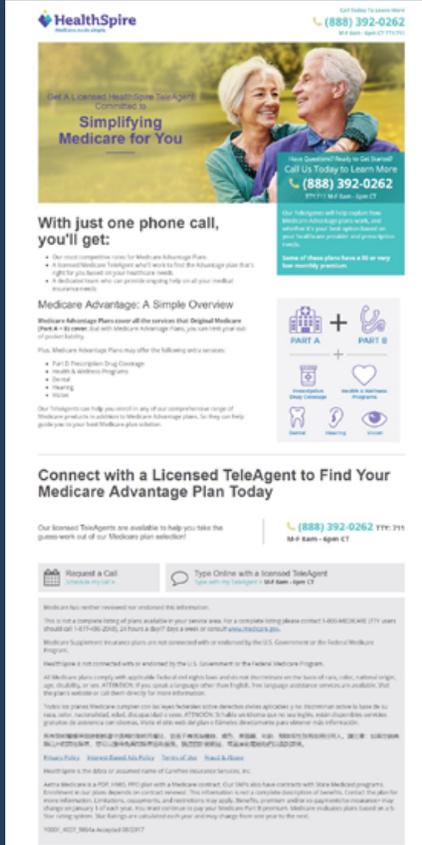
And based on that, they created the hypothesis: By providing emphasis on the trusted advisor value rather than overwhelming prospects with the various Medicare products and plans options, we will generate more leads and requests for calls than the control.

From that hypothesis, they designed two treatment landing pages and launched an experiment

Creative Sample #2:
Treatment 1 - Long Page



Creative Sample #3:
Treatment 2 - Short Page



RESULTS

Denis visited in the middle of the experiment, and the results we discussed in the video were intermediate results before the experiment closed. The final results also showed that the longer landing page performed better, generating 638% more leads.

638% More Leads* Produced by T1
When Compared to Treatment 2.

Desktop	Relative Difference
Treatment 1 (Longer Page)	638.6%
Treatment 2 (Shorter Page)	-

*Leads are defined as anyone who called into the call center and wasn't classified as a "bad lead" per HealthSpire's data reporting.

VALUE OF LONGER LANDING PAGE OUTWEIGHS ITS FRICTION

Visitors (valid leads only) who saw the longer page — which included more HealthSpire/agent value copy and imagery — were more likely to call than those who saw the simpler page with less content about the agents and HealthSpire values.

In other words, the additional value presented in the longer page outweighed the additional friction from having a longer page.

(Click the images above to see them enlarged in browser)

HUMANIZING THE BRAND ADDED APPEAL AND VISUALIZING THE AGENTS REDUCED ANXIETY

Knowing that they were going to be speaking with a friendly agent may have helped them visualize how the conversation would be and reduced their anxiety.

Creative Sample #4: TeleAgent Tip from winning landing page treatment



TELEAGENT TIP

"With Medicare Advantage Plans, you can limit your out-of-pocket liability. Some of these plans have a \$0 or very low monthly premium."

– Matt Coffey, Licensed TeleAgent

"What we found out by working with MECLABS and testing things is that, at the end of the day, what we are asking somebody to do is call us and talk to a person."

- Denis Mrkva

"So having actually the person or the people who the customers will be talking to on the site, and actually having the opportunity to get to know the agents before they call, and provide the content that will actually create a relationship between the customer and the agent on the site even before they call us, are some of the reasons why we believe that Treatment 1 is doing a lot better."

Creative Sample #1: Original landing page

The screenshot shows the HealthSpire Medicare landing page. At the top, there are navigation links for Medicare Plans, Our TeleAgents, and About HealthSpire, along with the phone number (888) 392-0262 and hours of operation (M-F 8am - 6pm CT TTY:711). The main heading is "Our Trusted TeleAgents Are Here to Serve You". Below this, there is a paragraph explaining that HealthSpire offers a comprehensive range of Medicare plans and that agents are friendly and helpful. A section titled "Meet one of our Licensed Medicare TeleAgents: Samantha Bartels" features a photo of Samantha and a Q&A section. The Q&A includes questions about what to have ready before calling, the most important thing to understand about Medicare options, and concerns about costs and confusion. A "Call Us Today To Learn More" button with the phone number (888) 392-0262 is also present. Below the Q&A, there is a "HealthSpire | Our Pledge To You" section with a list of commitments: listening to unique circumstances, determining what's most important, and helping find a plan that fits needs and budget. A photo of the team of licensed teleagents is shown at the bottom right.

(Click the image above to see it enlarged in browser)

IT ALL BEGINS WITH CREATING REAL VALUE FOR THE CUSTOMER

The longer landing page worked because it did a better job of increasing the perceived value of contacting a TeleAgent. However, for this strategy to work, Mrkva first made sure to create real value in interacting with the TeleAgents, that could then be communicated on the landing page.

“Part of that value is the people we employ. If you think about the agents that work for HealthSpire, all of our agents are college graduates,” Mrkva said. “The question became, how can we create a call center culture that becomes a value proposition for the college graduates?”

One way Mrkva’s team creates the value proposition for college graduates is by creating an environment the employees can thrive in. For example, they balance time on the phone with time reflecting on what they learned from previous calls — to help understand the psychology behind conversations they previously had and optimize future conversations. Understanding the people they’re talking to, not just the products they’re selling and a script they’re reading.

“It is perhaps the hardest sale you can make. What you’re trying to do is, in real time without looking at the person, persuade the person that if you have the right product for them and their needs, this is the right thing to do and to make a decision that will be very impactful on their well-being and financial health of their household budget.”

- Denis Mrkva

A CUSTOMER-FIRST MARKETING APPROACH

Not only is there value for customers who call into HealthSpire because the TeleAgents are well educated, but value also comes from the type of people the company hires and the customer-first philosophy behind the advice these agents offer on the calls.

“What we look for is — and it’s not easy, it’s not easy to evaluate people in an interview — is integrity. You have to do the right thing,” Mrkva said.

“We’re trying to find the right solution for the customer. And if there is no right solution for the customer with us, we will not sell.”

- Denis Mrkva

“Actually, we’ll recommend either stay with what you have, or maybe you should go and call other providers that have a product, because we can help them find the better product. Even though we cannot sell to them, we can tell them there is ... company X [that] has this product, so you may want to go to this site,” he said.

This approach helps with employee satisfaction and engagement as well.

“It’s human nature. Our nature is to help somebody. So we need to enable people to be people in the workplace,” Mrkva said. “If you have the right people and if you make them happy and content, our customers will be happy and content.”

Sources

[HealthSpire](#)

Related Resources

[Landing Page Optimization: 57 guides, case studies, examples and experiments to help you increase conversion and sales](#)

[Email Marketing: Landing Page Testing Less Popular But More Effective](#)

[Landing Page Optimization: How The New York Times Generated A 1,052% Cumulative Conversion Gain](#)

[Web Usability: Long Landing Page Nets 220% More Leads Than Above The Fold Call-To-Action](#)

[Landing Page Optimization: 262% Increase In Lead Rate](#)

[MECLABS Institute Landing Page Optimization online certification course](#) (from the parent research institute of MarketingSherpa)

[Call Center Optimization: How The Globe and Mail cut number of calls in half while increasing sales per hour](#)

[Call-to-Action Optimization: 132% increase in clickthrough from changing four simple words](#)

CONTACT US

For more information on how MECLABS Research Services can support your business and marketing strategy:

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EMAIL **SERVICES@MECLABS.COM**

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