StepUp Conversion

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Starter CRO Checklist

Introduction

'Starter CRO Checklist' is a concise, action-focused reference designed to guide marketers through every phase of a CRO project, from setting clear goals to executing tests and refining results. By following the steps and recommendations in this table, teams can streamline their decision-making, ensure cross-functional collaboration, and continuously improve their website's conversion performance.

Key Steps in CRO

1. IDENTIFY CONVERSION GOALS & KPIS
2. RESEARCH & ANALYSIS
3. HYPOTHESIS FORMULATION
4. IMPLEMENTATION & EXECUTION
5. REVIEW & REFINE

1 Identify Conversion Goals & KPIs

Action Items

- Define primary and secondary conversion goals (e.g., purchases, sign-ups)
- Determine baseline metrics (conversion rate, AOV, drop-off points)
- Align goals with business objectives

EXPECTED OUTCOME

Clear targets and benchmarks for measuring success of CRO initiatives

TOOLS REQUIRED

Google Analytics (GA4)
CRM platform

Best Practices

- *Keep goals measurable and specific*
- *Involve stakeholders early*
- *Document all metrics before changes*

2 Research & Analysis

Action Items

- Analyze user behavior (heatmaps, session recordings)
- Conduct surveys and interviews for qualitative insights
- Review site speed, navigation, and device performance
- Identify high-impact pages and top friction points

EXPECTED OUTCOME

Data-driven understanding of user pain points, informing hypothesis development

TOOLS REQUIRED

Hotjar, Crazy Egg, Google PageSpeed Insights, SurveyMonkey

Best Practices

- *Combine quantitative (analytics) and qualitative (surveys) data*
- *Identify recurring user issues*
- *Prioritize top-impact areas*

3 Hypothesis Formulation

Action Items

- Formulate testable hypotheses (e.g., “Changing CTA color increases CTR”)
- Prioritize hypotheses using a common framework (e.g., ICE, PIE)
- Engage cross-functional teams (marketing, product, design, dev) early for feasibility input
- Map each hypothesis to a specific KPI (CTR, CVR)

EXPECTED OUTCOME

A prioritized, testable plan that links proposed changes to measurable improvements

TOOLS REQUIRED

Project management tools (Trello, Asana), Analytics data

Best Practices

- *Keep hypotheses focused on one variable*
- *Seek team and stakeholder feedback before testing*
- *Apply prioritization frameworks for highest-impact tests*

4 Implementation & Execution

Action Items

- Assign responsibilities for coding, design changes, and QA
- Determine test duration and start date
- Ensure cross-functional alignment (marketing, product, design, development) on resources, timelines, and scope
- Set up tagging and tracking for each variation

EXPECTED OUTCOME

Smooth test deployment, ensuring tests are executed correctly and on schedule

TOOLS REQUIRED

Task tracking (Jira), QA tools, Analytics tags, A/B Testing Tools (Optimizely, VWO)

Best Practices

- *Communicate roles and deadlines clearly to all*
- *Confirm correct test setup (tagging, tracking) before launch*
- *Establish a clear handover process from ideation to execution*

A/B Testing Elements

Identify variations based on research

- Headline
- CTA
- Hero Image
- USPs / Copy
- Form Fields
- Page Load Speed
- Mobile Responsiveness
- Trust Signals
- Benefit Copy
- Urgency/Scarcity
- Navigation Menu
- Color Scheme
- Typography
- Social Proof
- White Space
- Video Content
- Exit Pop-Ups
- Live Chat/Chatbots
- Security Certificates
- Personalization

Segment audiences properly and run tests for sufficient duration

5 Review & Refine

Action Items

- Track test outcomes and identify winning variations
- Implement successful changes site-wide and monitor long-term impact
- Continuously launch new tests and refine hypotheses based on insights
- Create a monthly/quarterly experimentation calendars

EXPECTED OUTCOME

Sustained performance gains, ongoing optimization, and a shared roadmap for alignment

TOOLS REQUIRED

Data Visualization (Google Data Studio), CRM, Heatmap tools

Best Practices

- *Review post-implementation metrics regularly*
- *Maintain a testing roadmap*
- *Communicate findings and timelines to all stakeholders*

Global Leaders on Testing & Experimentation

"In today's world, there is no excuse for making gut decisions. You have to be data-driven." - Jeff Bezos, founder and CEO of Amazon

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"A/B testing is the new black. It's not a luxury, it's a necessity." - Avinash Kaushik, digital marketing evangelist

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"Testing is not optional. It's the most efficient way to learn and improve." - Andy Hunt and David Thomas, authors of "The Pragmatic Programmer"

"Experimentation is the engine of progress. It's how we learn what works and what doesn't."
"Progress thrives on experimentation! It's how we discover what works and what flops (fast!)." - Reid Hoffman - LinkedIn

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"Stop the "hope it works" approach! Testing is the most efficient way to build better things." - Andy Hunt & David Thomas, coding champions

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