Episode #237: Website Design Best Practices That Will Boost Your Conversion Rate

Video Transcription

Hello there and welcome back to another episode of "Money Script Monday." My name is Jaime Ramirez.

Today, we're going to be talking about the top dos and don'ts when it comes to building and maintaining your business website.

Today, when we're talking about website design and best practices, I really want you to think about this in the lens of using your website as another revenue-generating source for your business. So how can you use the tactics that I describe up here today to then boost your conversion rates and then hopefully increase traffic to your website?

So we are well into 2022 at this point. And if there's anything we've learned in the last two years, and I know, I know that's a phrase we've all heard way too much, especially us over here on the marketing team know that way too well. But if there's anything else to learn from the last two years, it's that your online presence really matters.

A lot of people are essentially meeting you for the very first time before getting the opportunity to actually shake your hand and meet face-to-face. A lot of those first impressions are happening virtually.

So the way that you can think about your website as an extension of your in-person office, so kind of as your digital office. And so how can you ensure that your site is working for you, your audience, and also boosting sales? Because ultimately, that's our goal here.

So with this huge shift to virtual operations in the last two years, it can feel overwhelming in that there's a sea of financial advisors that you're

competing against trying to gain clientele's trust. And so it can sometimes feel that everyone's website looks a little bit better than yours. And I know when I'm ever searching for products on Google, you know, I'm met with a sea of options as to where I can potentially buy this product.

You really want to think intentionally here and how you can make yours stand out above the competition. So if you're not a professional web developer, creating a near-perfect website is actually pretty challenging and nobody here should be a professional web developer.

So sure, there are templates and appealing themes that you can choose from online, but you want to make sure that you're following these basic rules to ensure that you're getting the best traffic results on your website, you know, from the moment that it goes live to years and years down the line.

You want to think about this as a consistent and reoccurring source of revenue for your business. Okay. So the first thing I want to talk about, we're going to get right into it because we have a lot to cover today.

The first thing I want to talk about is, does your website pass the five-second test, how to master first impressions, and website dos, where you can get started with today?

Okay. So before we get started talking about the dos and don'ts of website design, I kind of want to take a step back and have you think about, what does your website look like currently? And I want you to ask the question, does your website pass the five-second test?

So some of you might have heard of this before, but essentially, the five-second test is a common test that's used in marketing and design that helps us determine whether the site is doing what it's supposed to be doing. So does it serve its purpose for you and your clientele? Is your website doing what you want it to do specifically?

So the way that you would do this is that you would pull out your laptop and you really want to be asking someone who doesn't know what you do for a living because that would give them an unfair advantage.

But maybe at a coffee shop, for example, you want to ask a stranger, "Hey, can I ask you a few questions?" And you can also do this online. There are several online usability testing companies where you can pay a few bucks to have someone do this anonymously as well.

But, okay, so basically how it works is you're going to show someone your homepage screen. You're going to count to five. You're going to close that laptop. And then you're going to ask them these four questions right here.

So, number one, what was the page all about? Number two, what do you remember seeing? Number three, who would benefit from this service? And then number four, what action to take next?

And what I want you to think about with these questions is that they're all kind of touching on different things. So we're going to take a closer look at each of them.

So, number one, what was the page about? So for this, you can think about this as the content and the messaging on your page. Is it clear, concise, and getting the message across in an easily digestible format? And that's really crucial to making sure that your visitors know exactly what to do when they land on your website.

And number two, what do you remember seeing? So this is all about the visuals on your website. So the images you choose, the color theme that you choose, do clients see themselves and the images that you're choosing on your website, and does your color theme actually make sense for the type of business that you're trying to portray? So all these elements and how they work together will really go a long way in getting that message across to your visitors effectively.

And number three, who would benefit from this service? So who is your website for? Is it for expecting mothers? Is it for middle-schoolers? Is it for pre-retirees and retirees, high-net-worth clients? You want to make sure that your visitors know in those first 10, 5 seconds. You want to make sure that your visitors know in those first five seconds that this is a place that they need to be at.

And then number four, what action to take next? So you can kind of think about this as the call to action on the page. So this is usually a button that you'll see pretty clearly on the homepage that's typically in high contrast with other colors on the page just so that it really stands out to you and that your visitor has to do the minimal amount of thinking possible so that they know exactly what they do if they want to take next steps with you.

Okay. So what you'll discover when you do this is whether or not your homepage is actually giving the first impression that you want it to. Is your client in the right place? Do they want to keep learning about your business? And do they know how to move forward with you right now, you know?

And this five-second test, it's a quick and fast test that you can do today to give you some insights to see if you're on the right track and where you could potentially make improvements on your website.

Okay. So now that we've kind of talked about the five-second test, how do we actually put this into practice? So how do you actually master first impressions when someone lands on that website, and what does this look like on a website homepage?

 So I think the most important part here and the rule of thumb is when you're writing copy for your homepage, you want to be writing that in a problem-solution format.

So if you look back at your site right now, what is the main problems that your clients have? What is getting them to that crucial point where

they want to take action? You know, maybe it's finally time for them to hire an investment manager, or maybe their kids are trying to get into the college of their dreams, but they need help figuring out how to do that.

Maybe they need a closer look at their finances, or they're trying to plan for their retirement. Whatever their problem is and whatever solution you provide, that has to be the first thing that someone sees when they land on your page.

This is the text that we like to call above the fold. So that's the big, huge text right at the top of the homepage, and that's really what'll help you determine if your website will pass that five-second test. And another note I'll make here is that in today's world, most people are accessing web pages on their mobile devices.

It's really important that your website is optimized for mobile viewing as well because you want to make sure you're catering to the way that your audience is experiencing your content.

I'm going to link a couple of resources down below that'll help you figure out if your website is mobile-friendly, if it has a load time that's within a reasonable time, and some keywords that you could potentially use for the kinds of messaging that you want to portray. And so definitely check those resources down below.

But, okay, so now we've kind of talked about first impressions and what it means when someone lands on your website, but actually, what kind of marketing strategy can you utilize to actually make sure that you're hitting all of those points?

Let's kind of talk about the basics when it comes to what you need to have on your site to make sure that it's a high converting one and an engaging one as well.

So, first and foremost, you want to design your homepage for first-time visitors not repeat visitors. So you can accomplish this by using simple

language and creating an easy pathway on your website so that they can get the information that they care about the most.

Although this might seem like a simple process, there's a lot of intentionality behind the words you use, and it's really important that you're trying out different things to see what's working best with your audience.

And while you might have fresh content to share like the latest blog post or there's an event that's coming up that you really want to feature on your website, that's really something that you want to reserve for below the main message of your homepage.

So kind of as you scroll through, that's where you want to start incorporating those other high-value materials on your website.

This is where data is your best friend as well. So if you see that you're getting a lot of traction with certain material that's providing your clients with a lot of value, so, for example, like a 401(k) calculator or a retirement preparedness test, you want to make sure that those are very easy to find on your website.

Although you might be thinking about these tools as a way to learn more about clients and website visitors, this is also an opportunity for the client, for the visitor, to learn more about you.

So to learn about your AUM, your goals, your resources, what's your opinion on risk tolerance, things like that so that they have a better view of how you can help them as a financial advisor.

So when you have that first meeting, although you're taking in as much as you can to learn about them, you want them to be doing the same thing and learning about you and the services that you provide. That'll make that first appointment much more productive and it will lead to the desired results that you guys are hoping to see.

Another thing I'll mention here, which is something that not a lot of people like to hear, is that your website is never done. So you really want to show your visitors how engaged you are and how you are an active authority in the industry.

This can be done by posting new content regularly because you want to make sure that your website doesn't have that outdated look. Those kinds of websites are a lot harder to trust in today's age.

So this content here was really meant to just touch the surface. If you're really interested in diving a little bit deeper into these strategies, for example, how to write a strong bio or how to write a compelling call to action, then I strongly encourage you to reach out to your field support representative to learn more.

Thank you so much.