

# EVERYTHING IS ALWAYS A LITTLE WRONG

*A Crash Course in Optimization for Copywriters*

This discussion and worksheet will give you a model you and your clients use together.

You will be ready to use this in your retainer offer to start optimizing for results.

**It was all an educated guess.**

Jot down everything you guessed at during the last project you completed. Everything that is a guess can and should be optimized. Don't worry if everything was a guess.

## Headline

## Where to put the offer

## Hook

If we should lead with discounts  
in the offer area

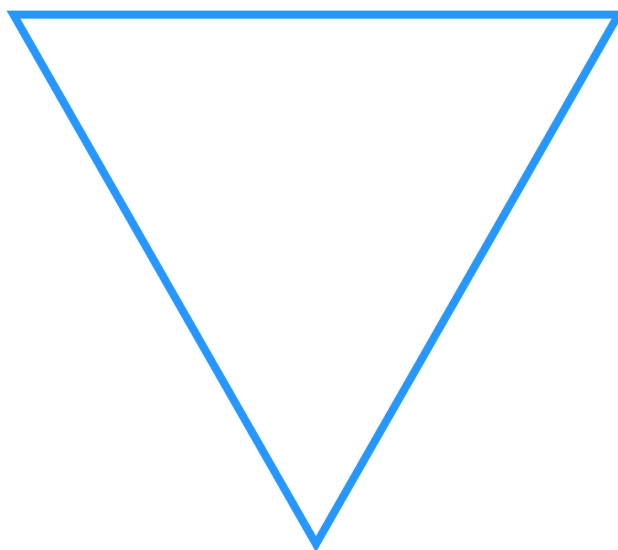
## Framework

## What to say first

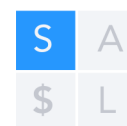
## OPTIMIZATION NEEDS GOOD NUMBERS

Before you come up with an hypothesis or research question, you need to first have a goal in mind that you can make good assumptions around. The goal is likely to be referred to by your clients (and thus by you too!) as a Key Performance Indicator (KPI). A higher-level goal, an example KPI is *Double Leads Generated in Q2*. A metric is the way you measure for the KPI, such as Page Views. Because there are so many metrics you can measure, we want to focus only on the “metrics that matter” for a KPI. **Follow the mantra, “It only matters if it matters.”**

- ☐ Identify three KPIs for your retainer offer
- ☐ Identify the 2 to 3 supporting metrics for each KPI (“metrics that matter”)
- ☐ Map the KPIs and MTMs on a triangle or similar diagnostic / model



- ☐ Educate your client on the diagnostic to get their buy in
- ☐ Measure the MTMs at regular, scheduled intervals
- ☐ Measure the MTMs month over month and year over year
- ☐ Report on progress toward KPIs



# What are your KPIs & MTMs?

Your job gets harder if you have too few goals / metrics or too many of them. Also prepare to discuss these with your client and refine them as you standardize more.

The primary goal for my offer is usually...

And we know if we hit it or not by measuring...

The secondary goal for my offer is usually...

And we know if we hit it or not by measuring...

The third goal for my offer is usually...

And we know if we hit it or not by measuring...



# THE MOST COMMON METRICS

COPY SCHOOL  
PROFESSIONAL

## ATTENTION & ATTRACTION / MARKETING

Clicks / Click rate

Cost per click (CPC)

Cost per lead (CPL)

Return on ad spend (ROAS)

Website traffic

Bounce rate (and exit rate)

New visitors vs repeat / returning visitors

Traffic to lead ratio

Page views

Website conversion rate (or page-level conversion rate)

Cart abandonment

Sales demos booked

Social media follower growth

Customer acquisition cost (CAC)

Email delivery rate

Email subscribers / New email subscribers

Email open rate

Email click rate (CTR)

Email unsubscribe rate (and email complaint rate)

List growth rate

BEGINNER

INTERMEDIATE

ADVANCED

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## THE MOST COMMON METRICS

CONVERSION,  
SALES & REVENUE

Net sales revenue / Gross sales revenue (or just sales revenue)

Sales growth rate (e.g., MoM, YoY)

Churn rate / Customer turnover rate / Customer attrition

Lead response time (i.e., time needed for rep to reach out to new lead)

Lead to sale conversion rate

Demo show-up rate / Sales call show-up rate

Time to purchase / Close time (i.e., sales cycle length)

Average revenue per user (ARPU)

Average revenue per account (ARPA)

Monthly recurring revenue

Annual recurring revenue

Cart abandonment

Conversion rate

Cost per conversion

Net profit margin / Gross profit margin

Customer retention

Customer lifetime value (LTV / cLTV / CLV)

Revenue per employee

Net promoter score (NPS)

# THE MOST COMMON METRICS

## ENGAGEMENT, REFERRALS & RETENTION

Customer satisfaction

User activation

User engagement

User retention

Daily active users / Weekly active users / Monthly active users

Session duration

Number of sessions per user

Task success rate

(Reached AHA moment)

System usability scale (SUS)

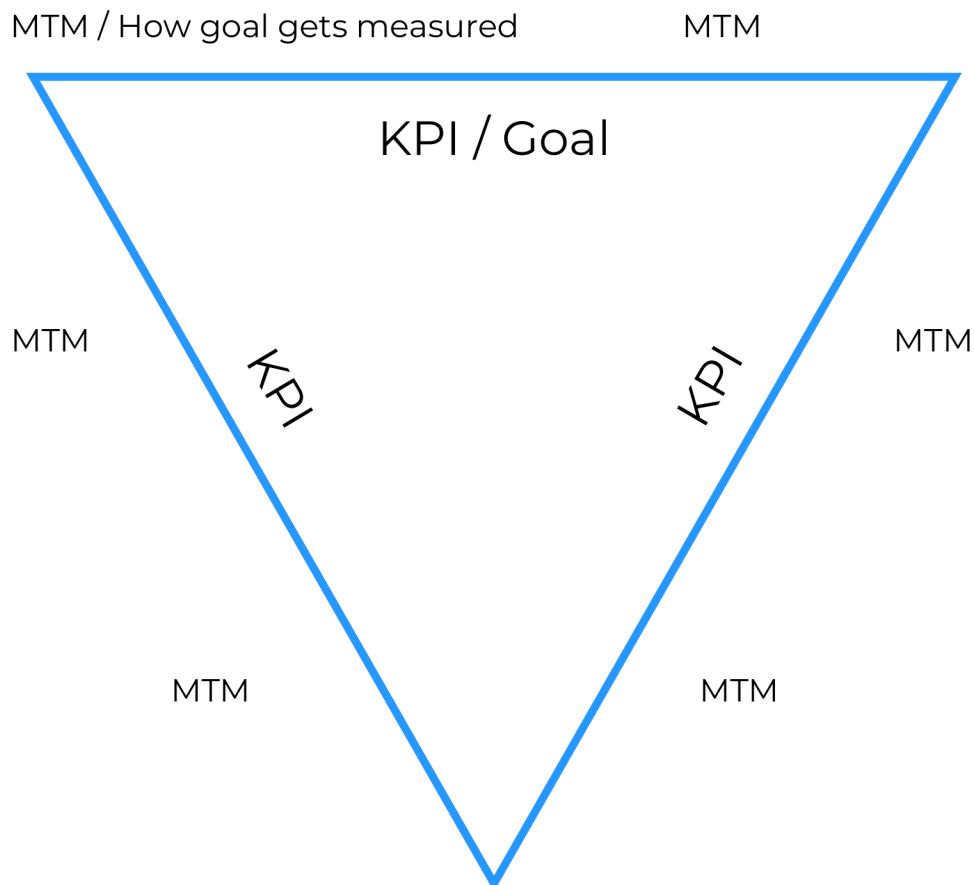
Email forward / share rate

Customer satisfaction score (CSAT)

Net promoter score (NPS)

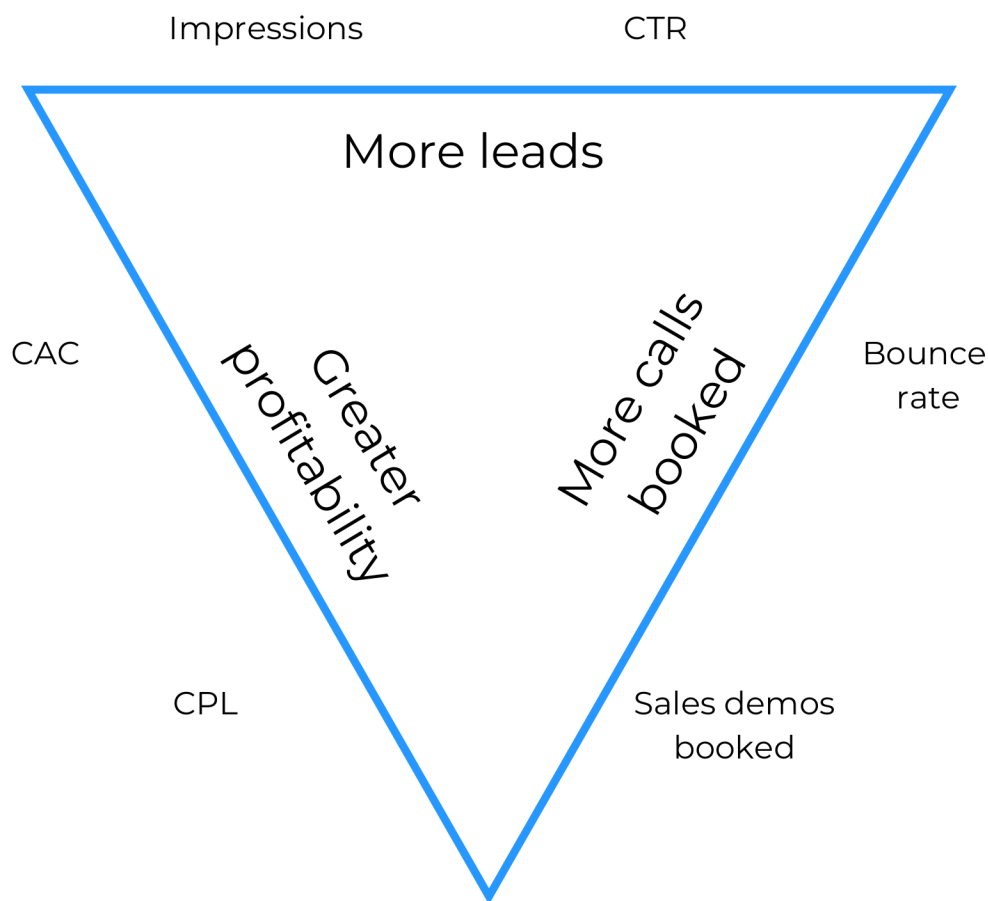
## YOUR KPIS & MTMS

Your standardized offer and retainer offer should both be measured the same way. So a KPI and a MTM for your standardized offer is also the KPI and MTM for your retainer offer. Note that, if you already have a diagnostic, this *may* be ready to go and you just need to identify the metrics that matter!



## EXAMPLE - LEAD GENERATION W/ ADS

Imagine the standardized offer is an Ad Funnel Audit that finishes with not only a report but also a gantt chart or roadmap that defines what to work on when and how to measure success. The retainer offer is implementing against that roadmap and reporting, month after month, how the ad funnel is improving, toward the KPIs.



## IF THIS THEN THAT CHEATSHEET

Identify what may be the opportunity for each of the six metrics that matter. For example, if the click-thru rate on an ad is low, what could be the problem? Refer back to your list of guesses if you're not sure.

MTM: _____	MTM: _____	MTM: _____
MTM: _____	MTM: _____	MTM: _____



# IF THIS THEN THAT CHEATSHEET

Identify what may be the opportunity for each of the six metrics that matter. For example, if the click-thru rate on an ad is low, what could be the problem? Refer back to your list of guesses.

MTM: Impressions	MTM: Click thru rate	MTM: Bounce rate
<i>Audience (too narrow, too broad, new, etc)</i>	<i>Offer (good, bad, weak, invisible, etc)</i>	<i>Headline (message match, attention-grabbing, etc)</i>
<i>Image / Video</i>	<i>CTA</i>	<i>Trust factors</i>
<i>Hook / Keyword</i>		<i>Load time</i>
MTM: Sales demos booked	MTM: CPL	MTM: CAC
<i>Friction (form fields, distance to fold, etc)</i>	<i>External factors (algorithm, competition, etc)</i>	<i>External factors (algorithm, competition, etc)</i>
<i>Availability</i>	<i>Targeting</i>	<i>Market / Audience changes</i>
<i>Offer</i>	<i>Offer</i>	<i>Lead quality</i>

# MTM: Impressions - Audience

Too narrow

Too broad

New to us – too diff from what we've been doing successfully

No lookalike as a starting point

Too close to our existing list of non-converters

Too hard to reach

Too hard to reach on this platform – try on diff platform?

Doesn't want our offer

Needs to hear about more relevant benefits than our ads show

Not reflected in our ad images – audience mismatch visually

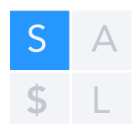
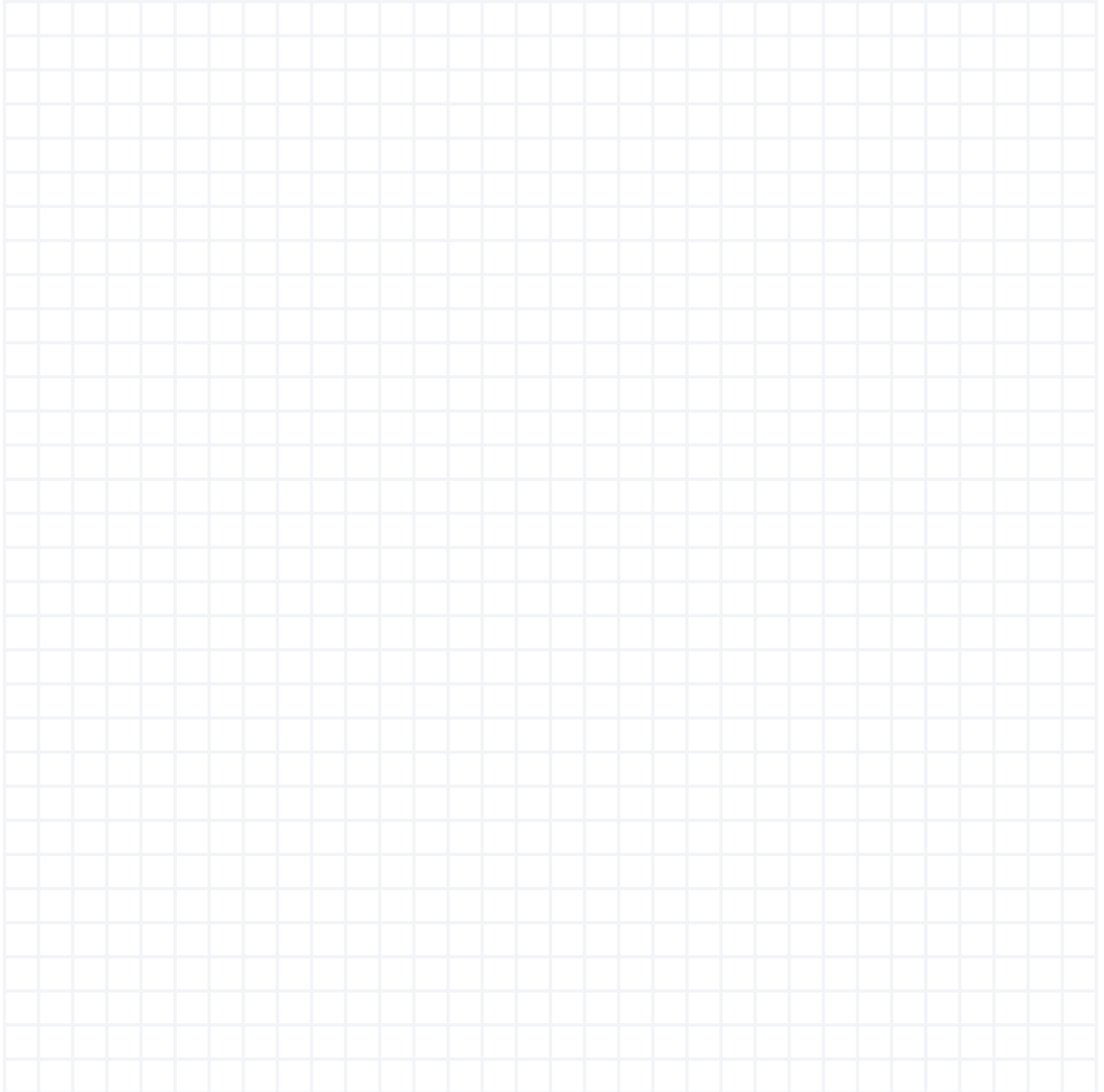
## It often comes down to...

Wrong X  
Changed X  
No X  
Weak X

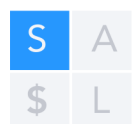
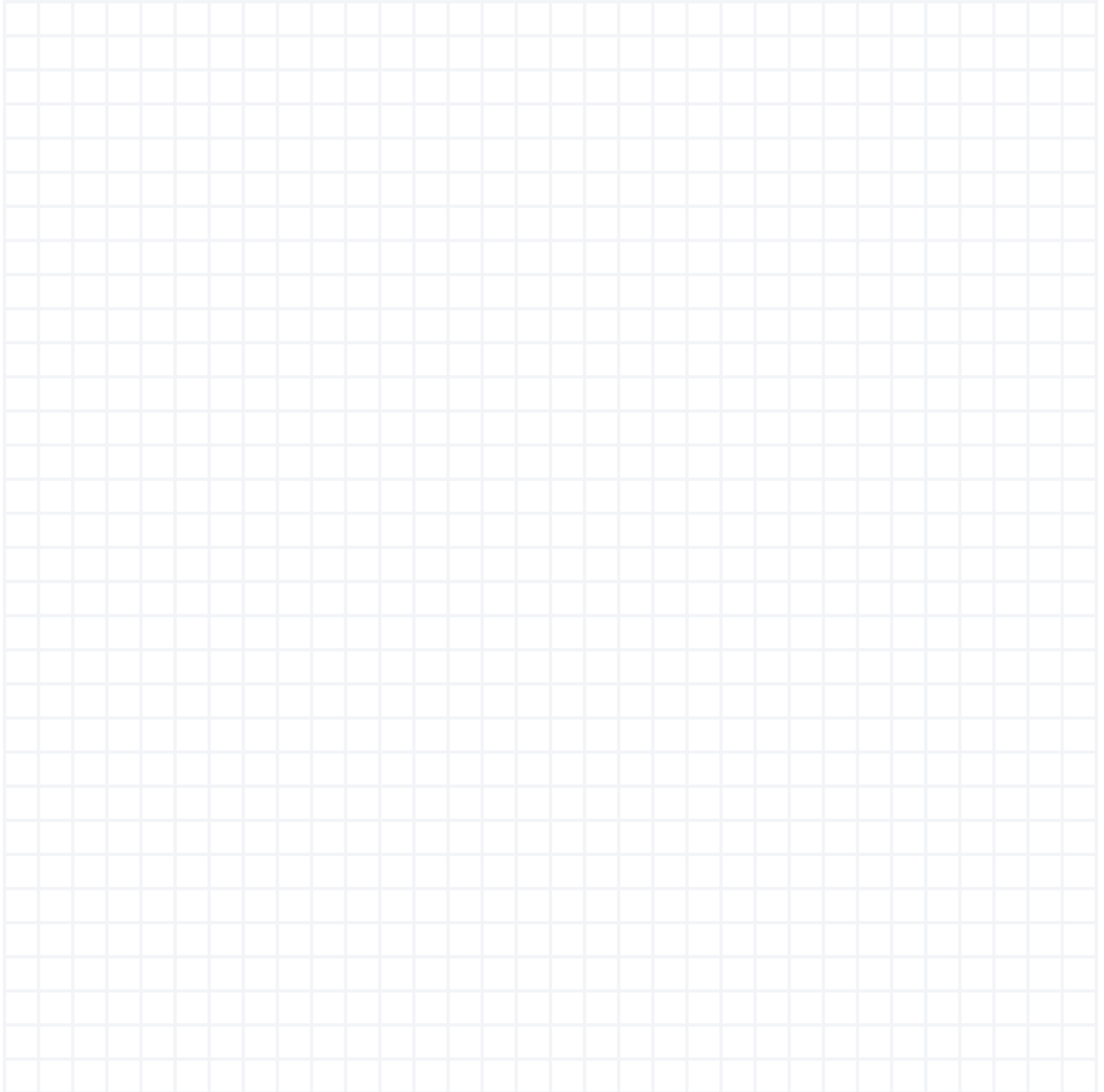
Too narrow  
Too broad  
Too many  
Too few  
Too clever  
Too timid  
Too different  
Not different enough

Introduces new X  
Swiped not strategic  
Guessed at  
Ego-based

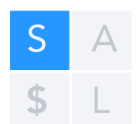
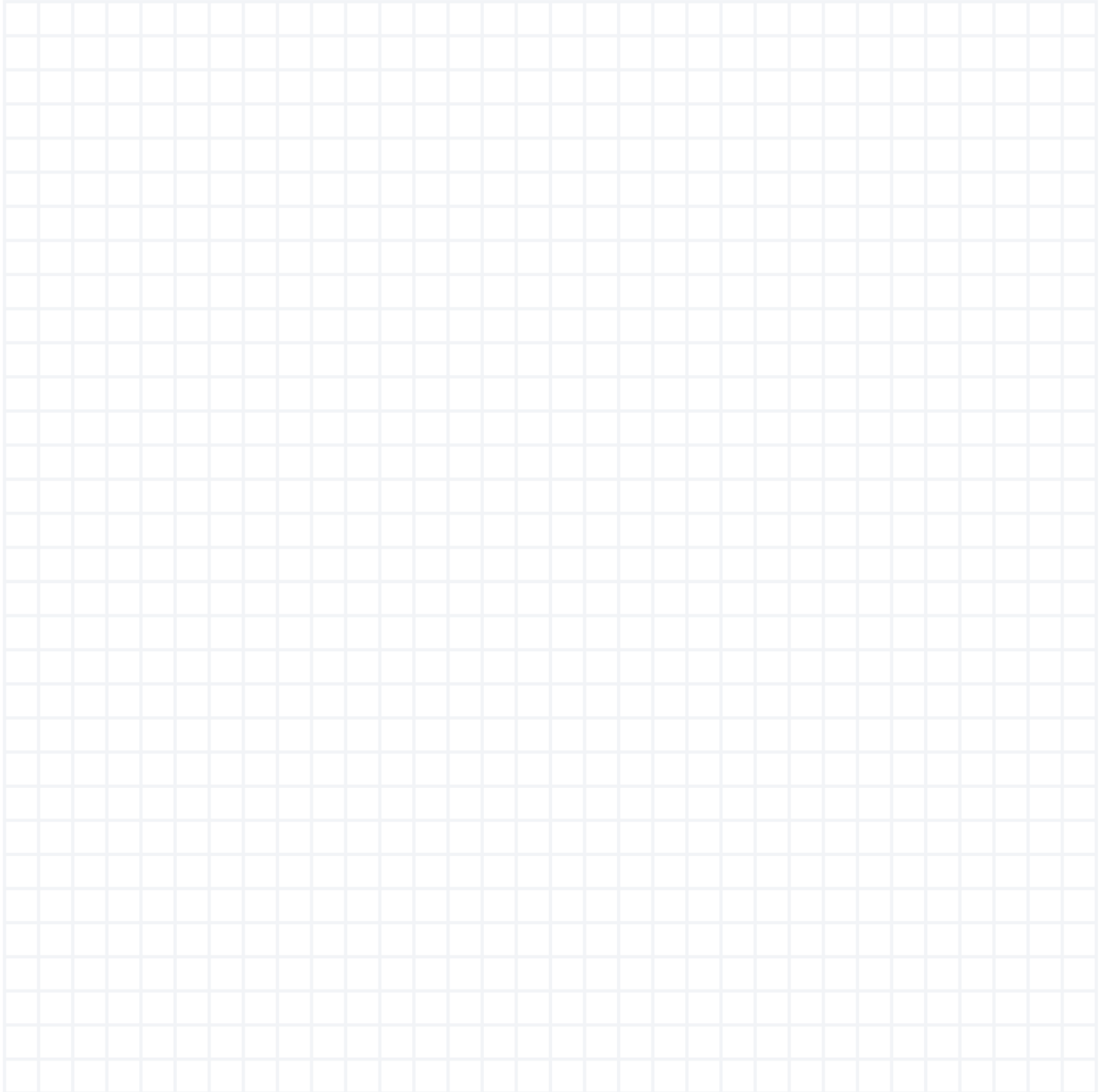
MTM: \_\_\_\_\_ - \_\_\_\_\_



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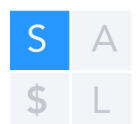
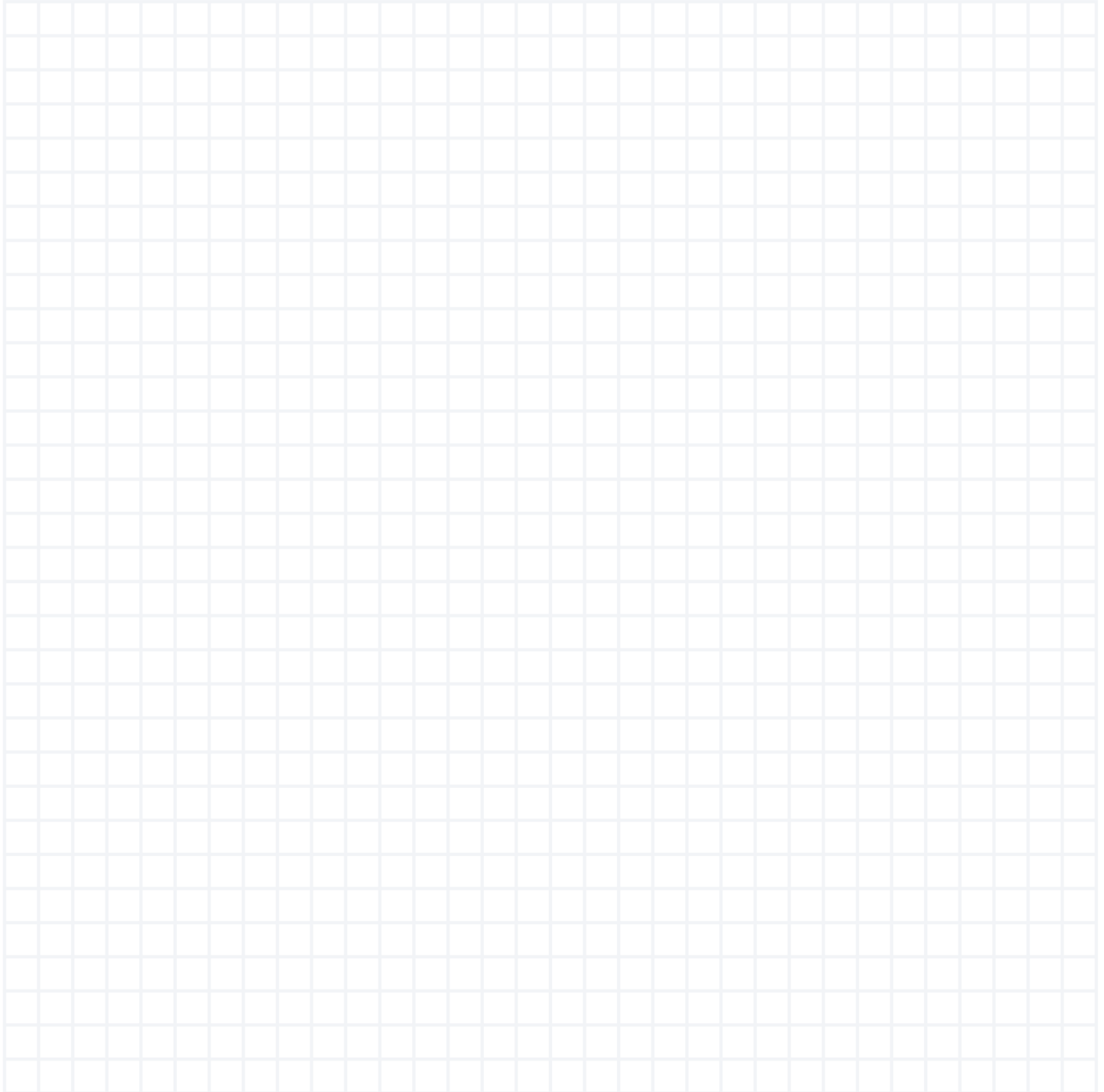


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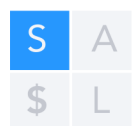
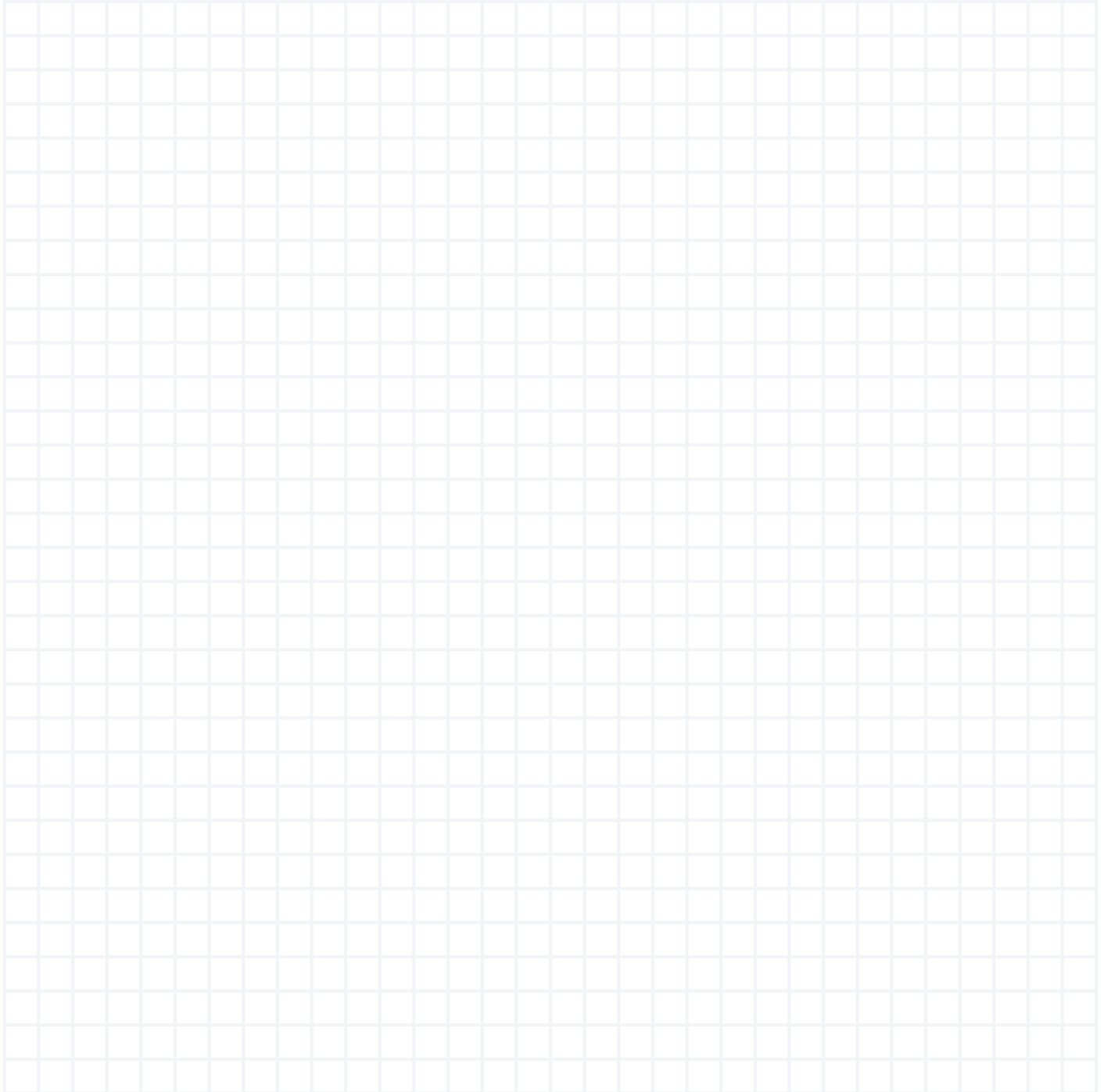




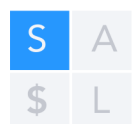
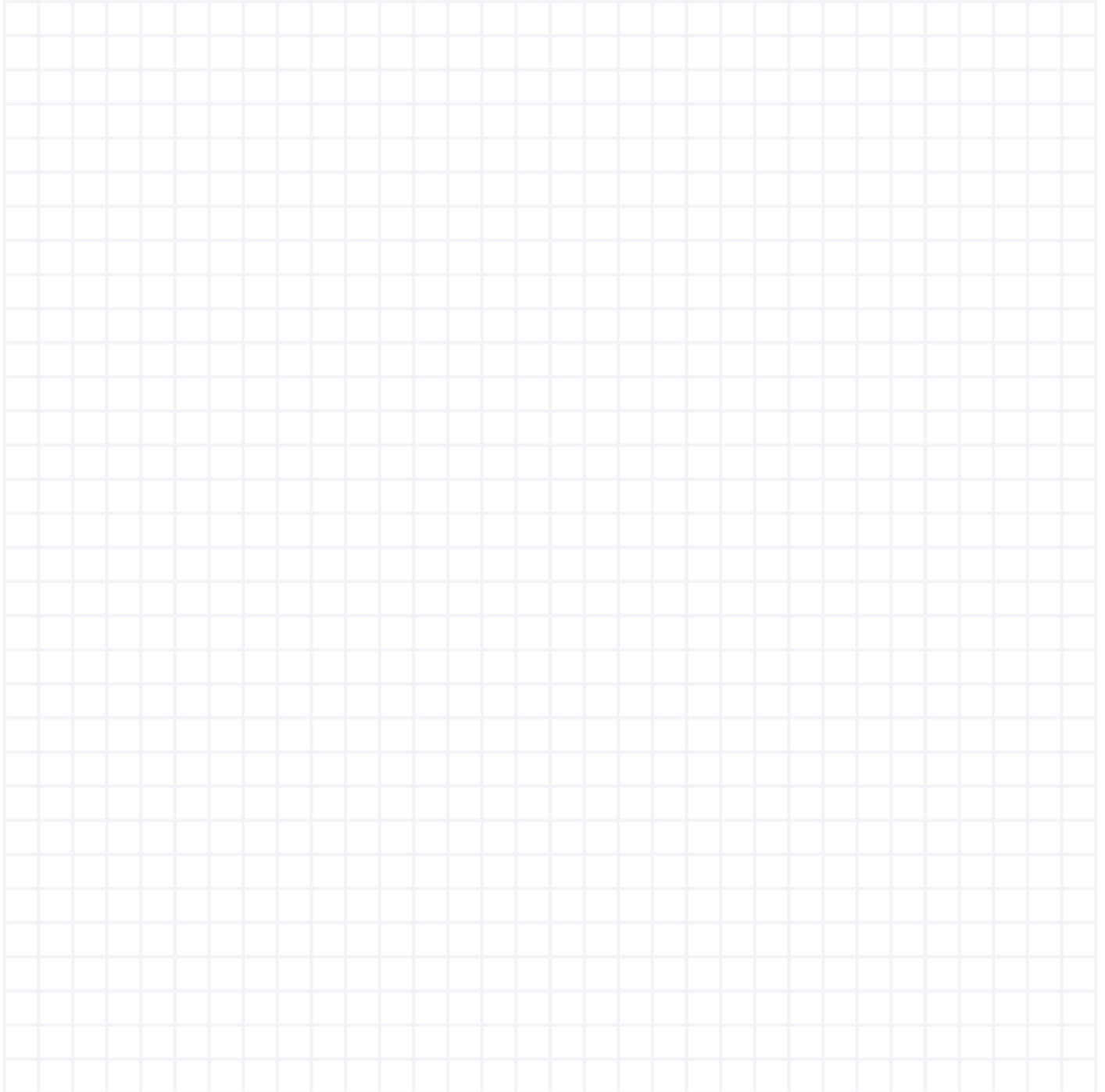
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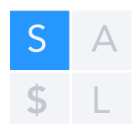
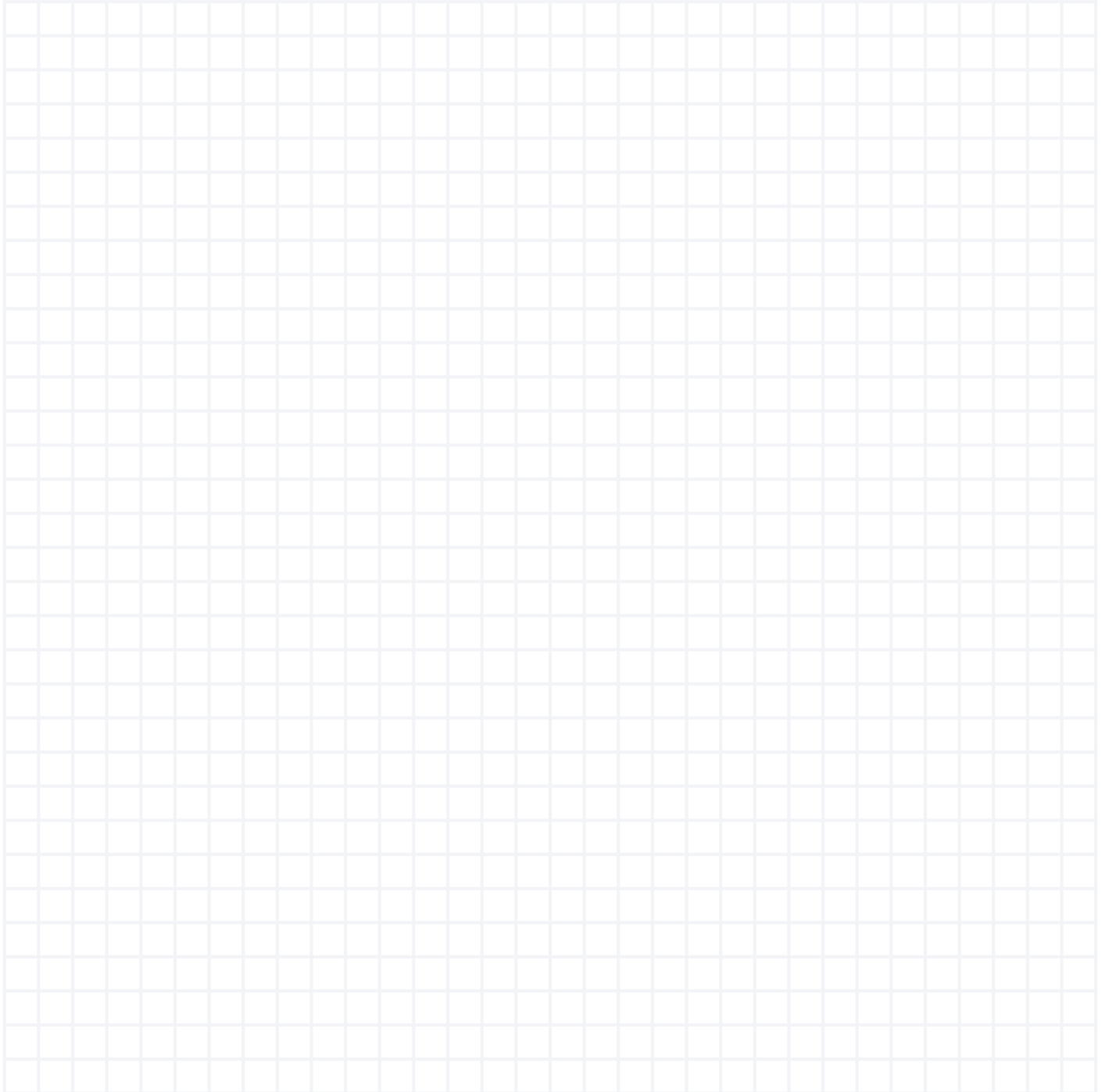
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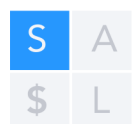
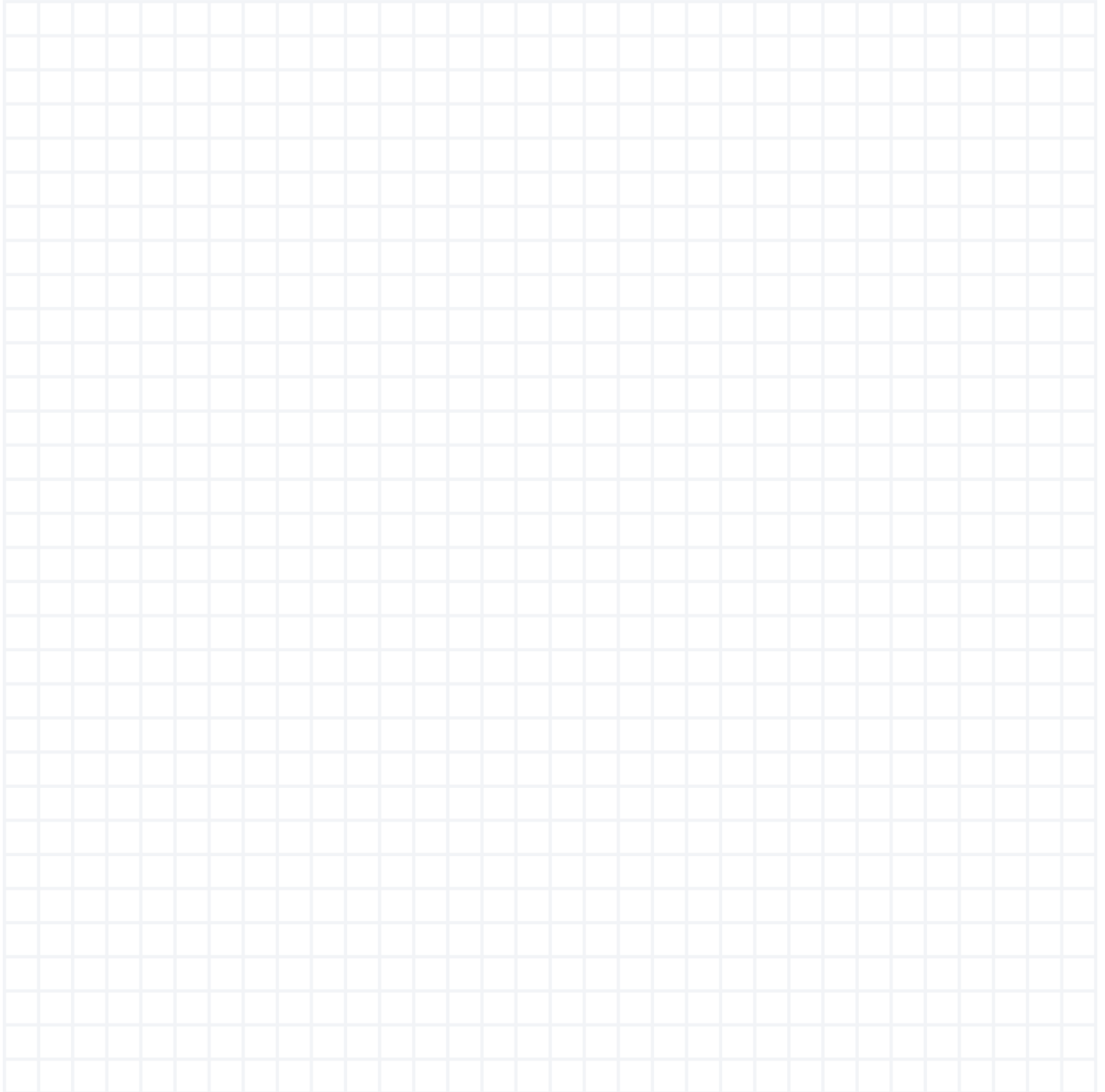
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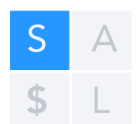
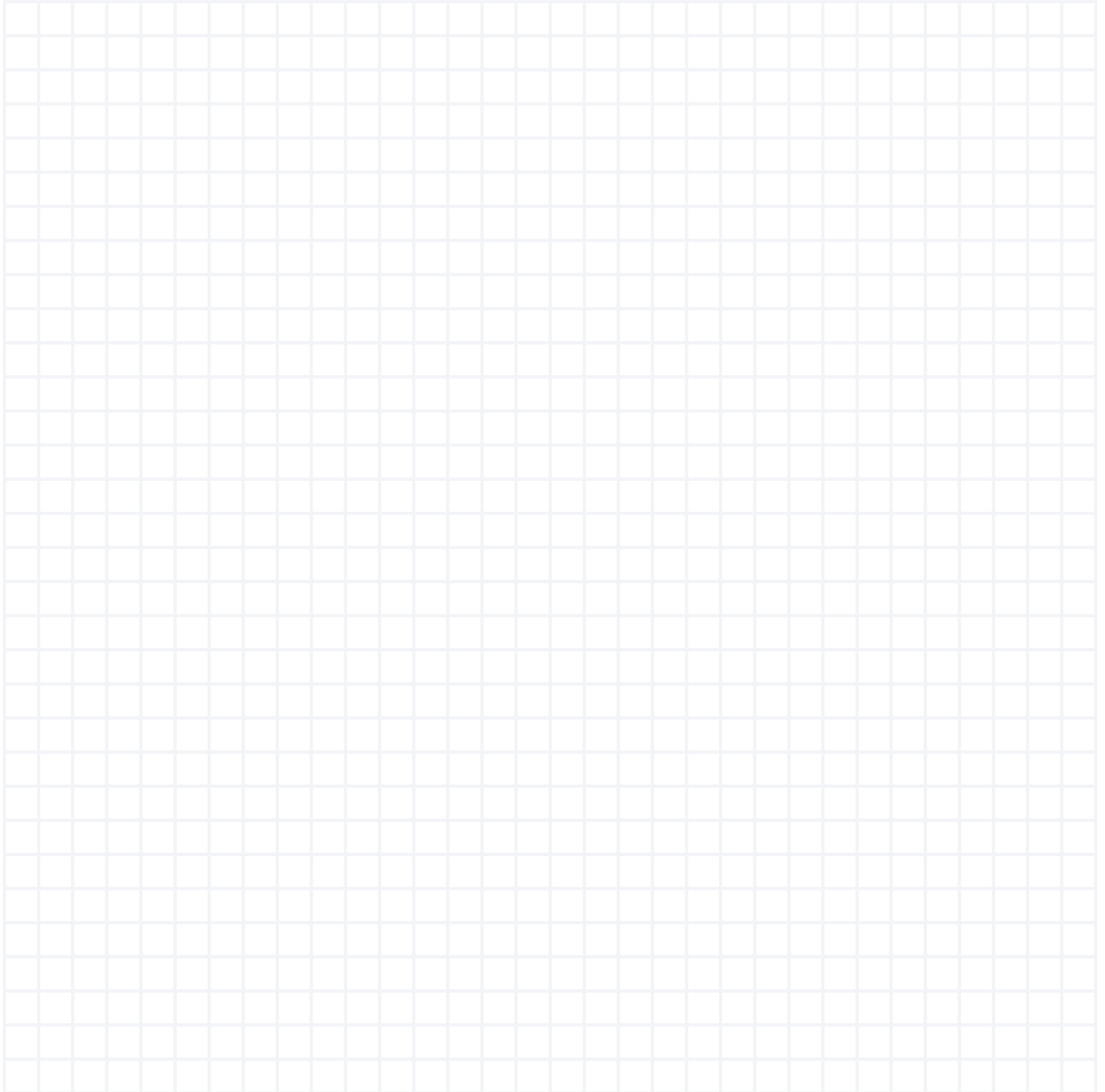
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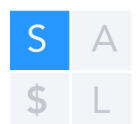
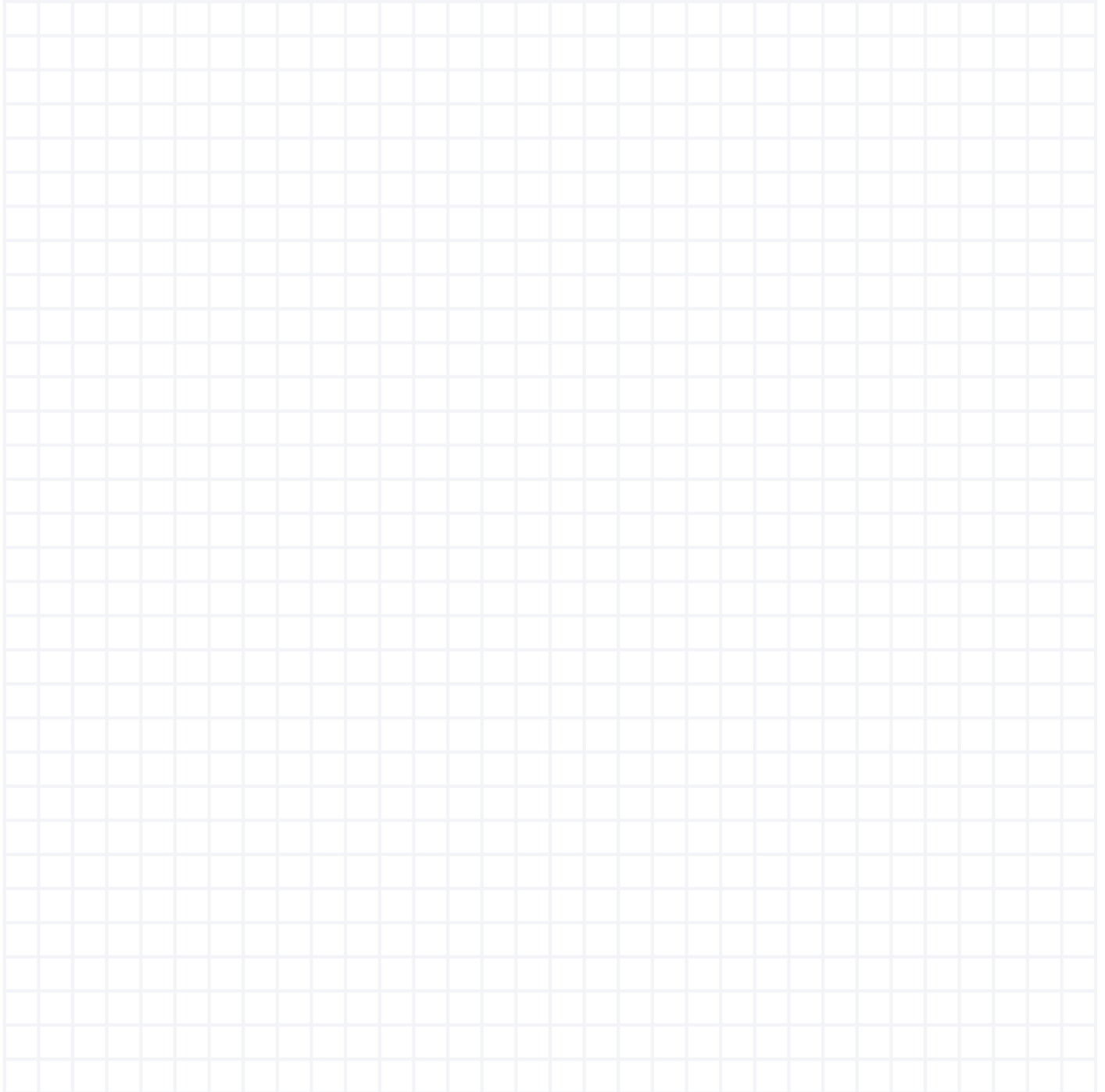


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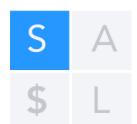
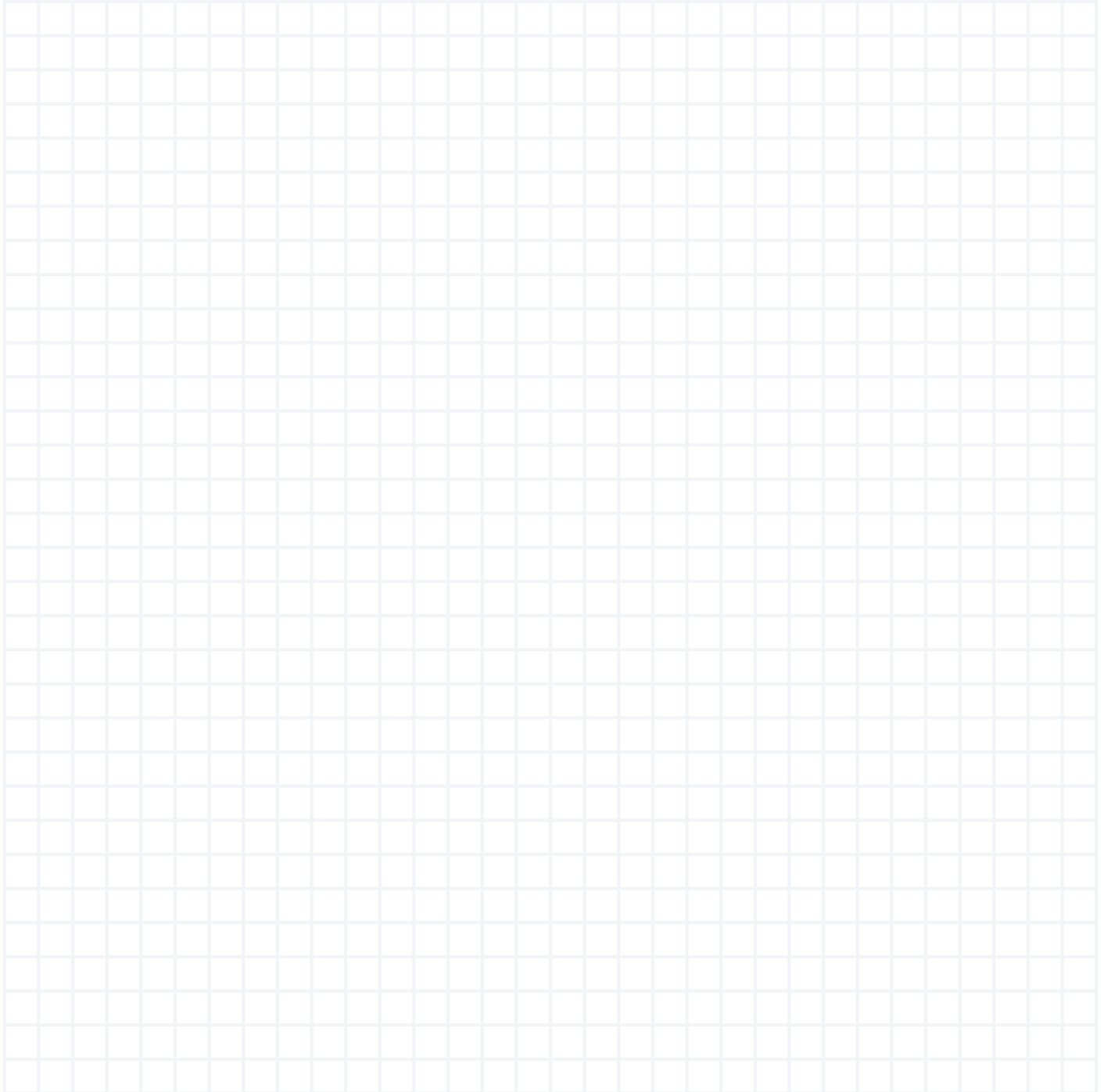




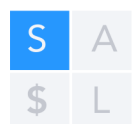
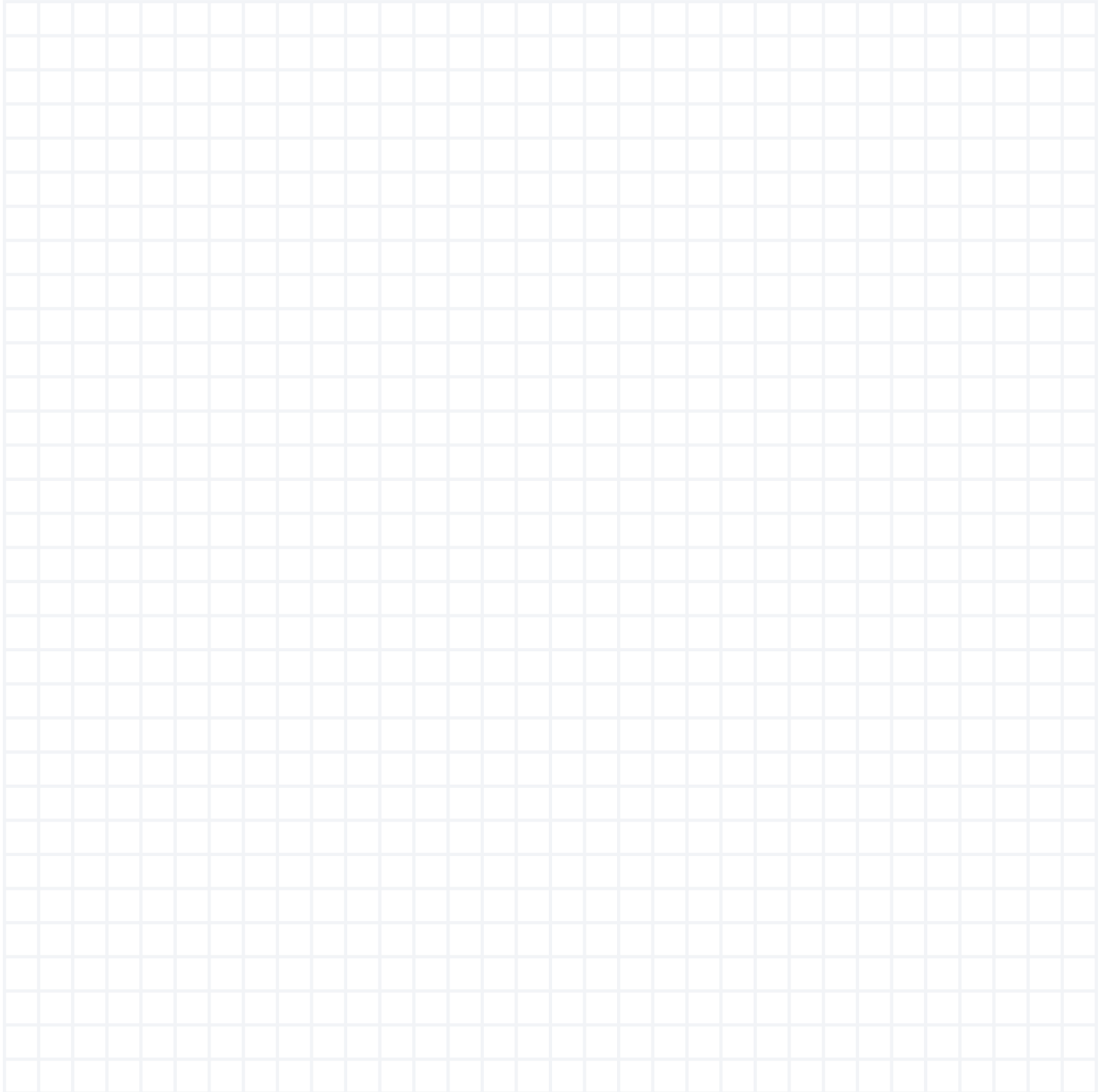
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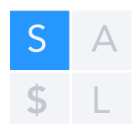
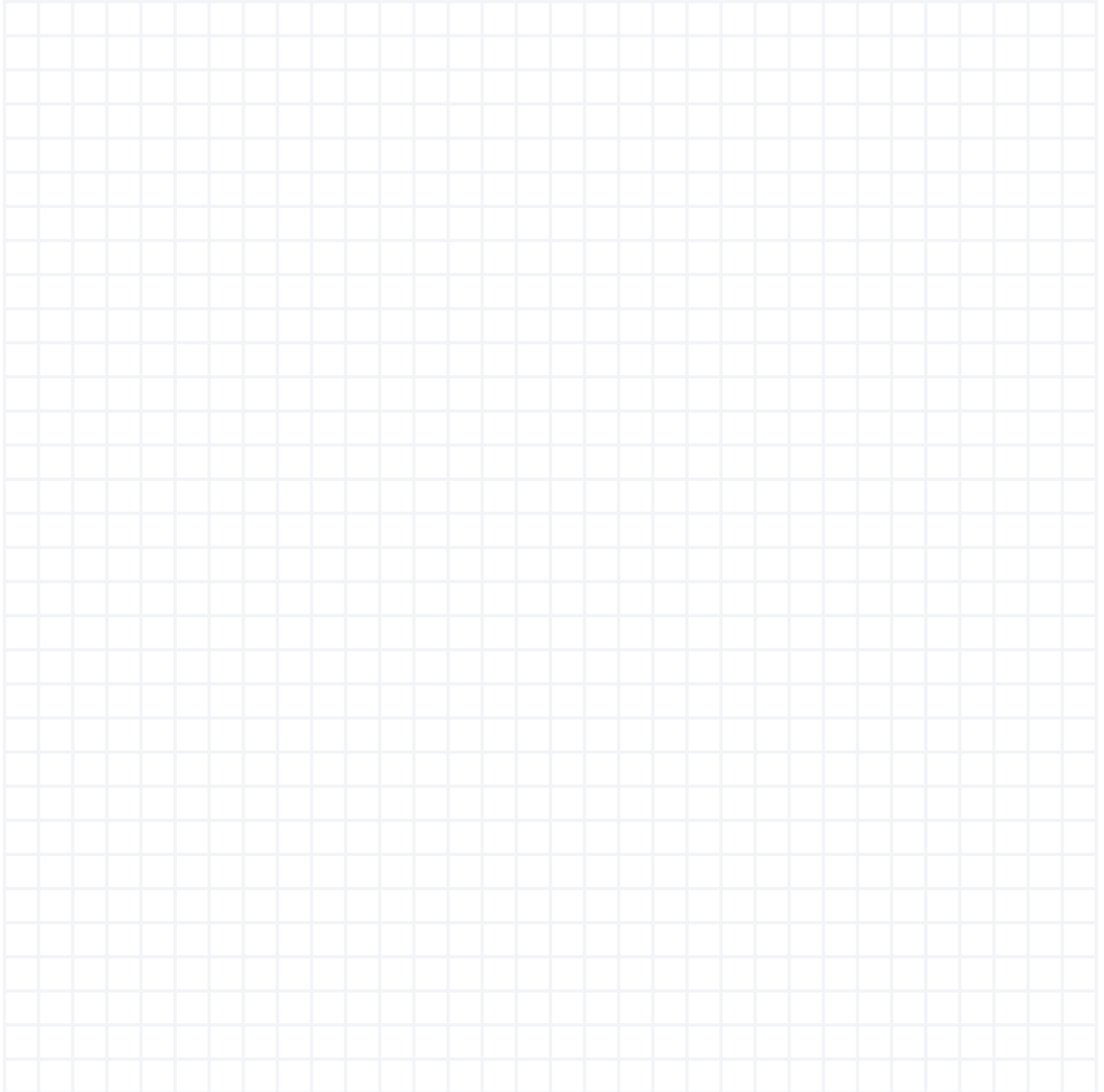
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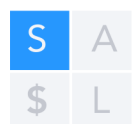
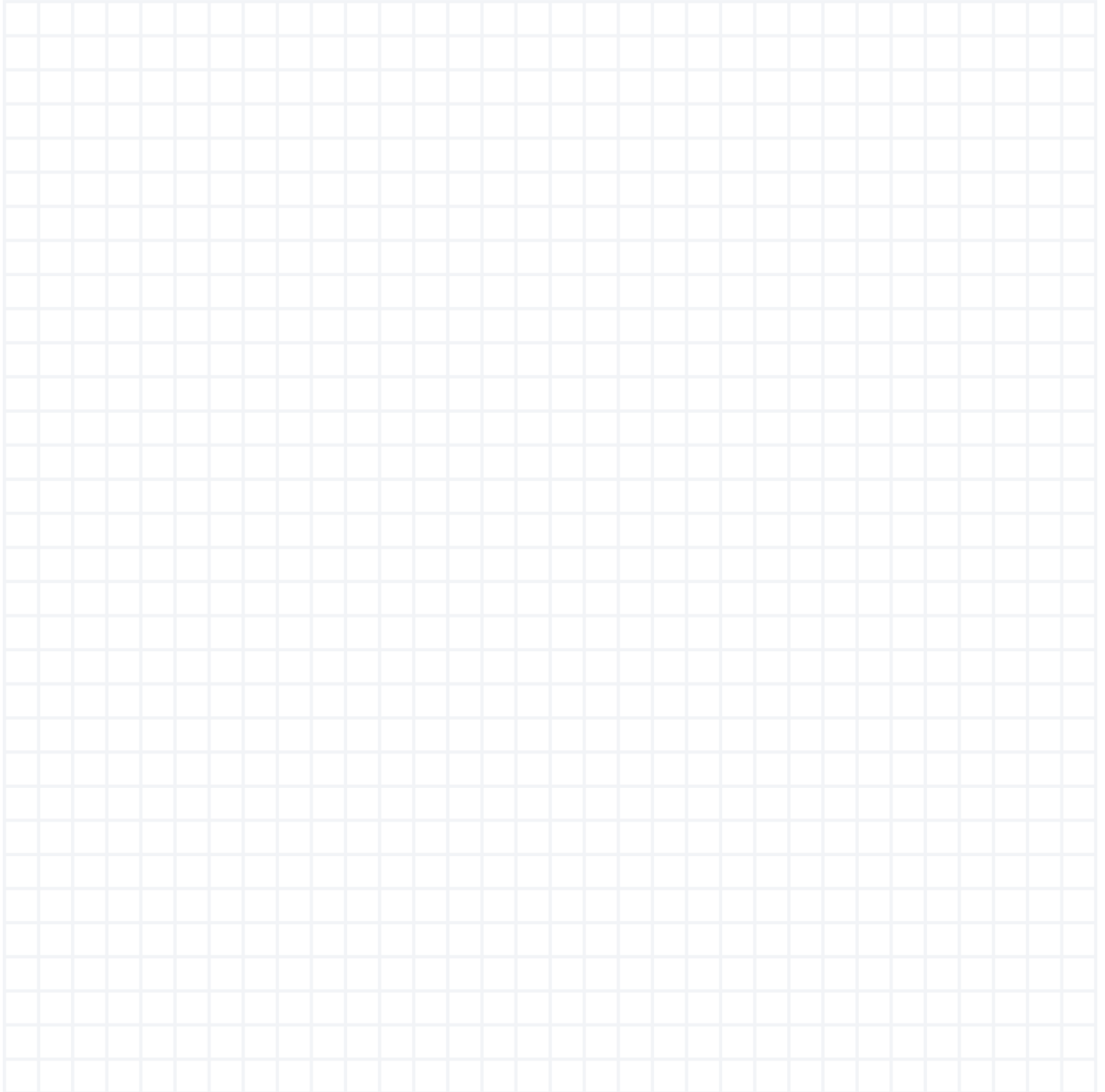
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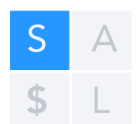
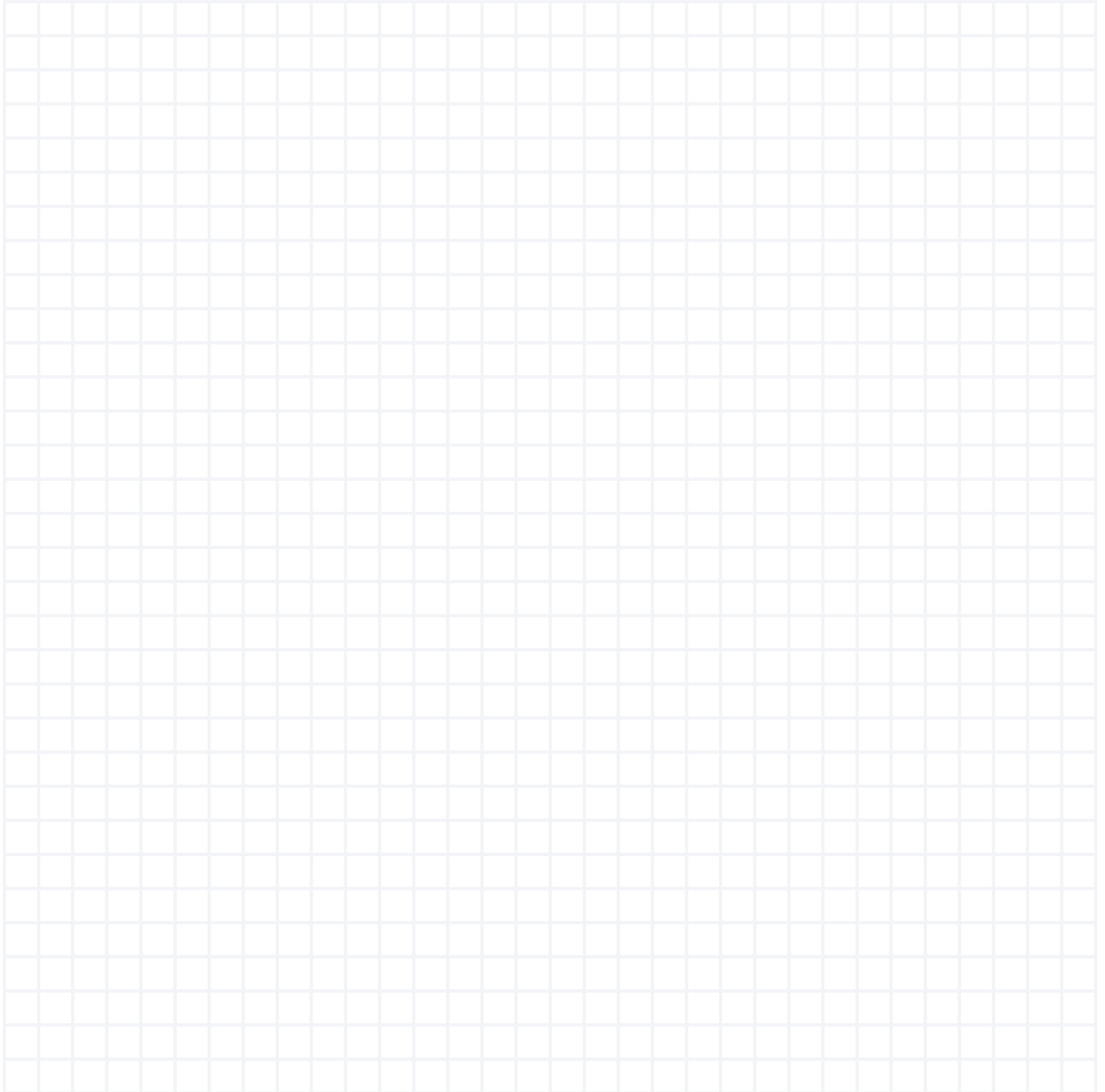
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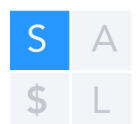
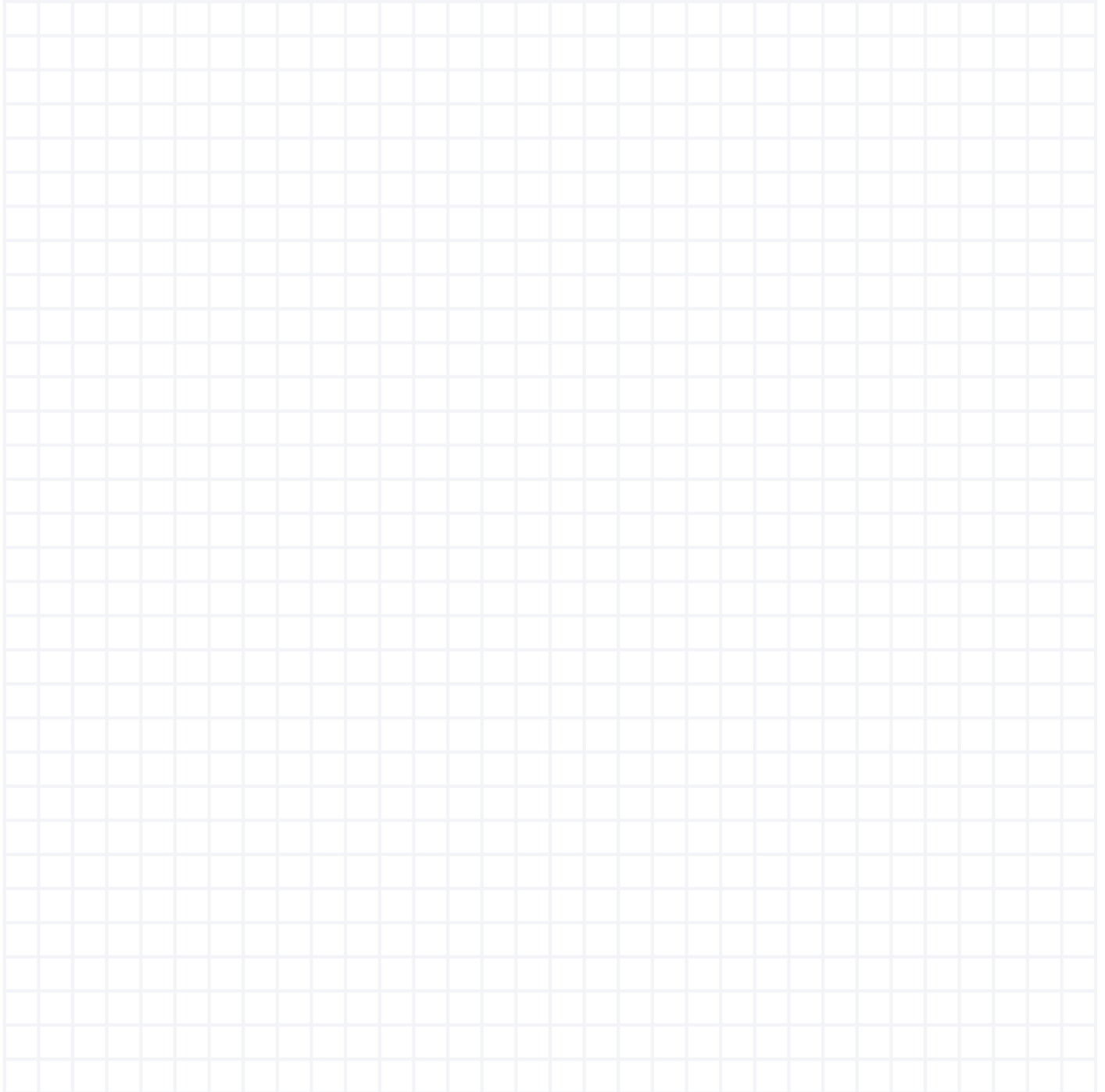


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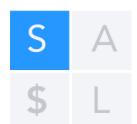
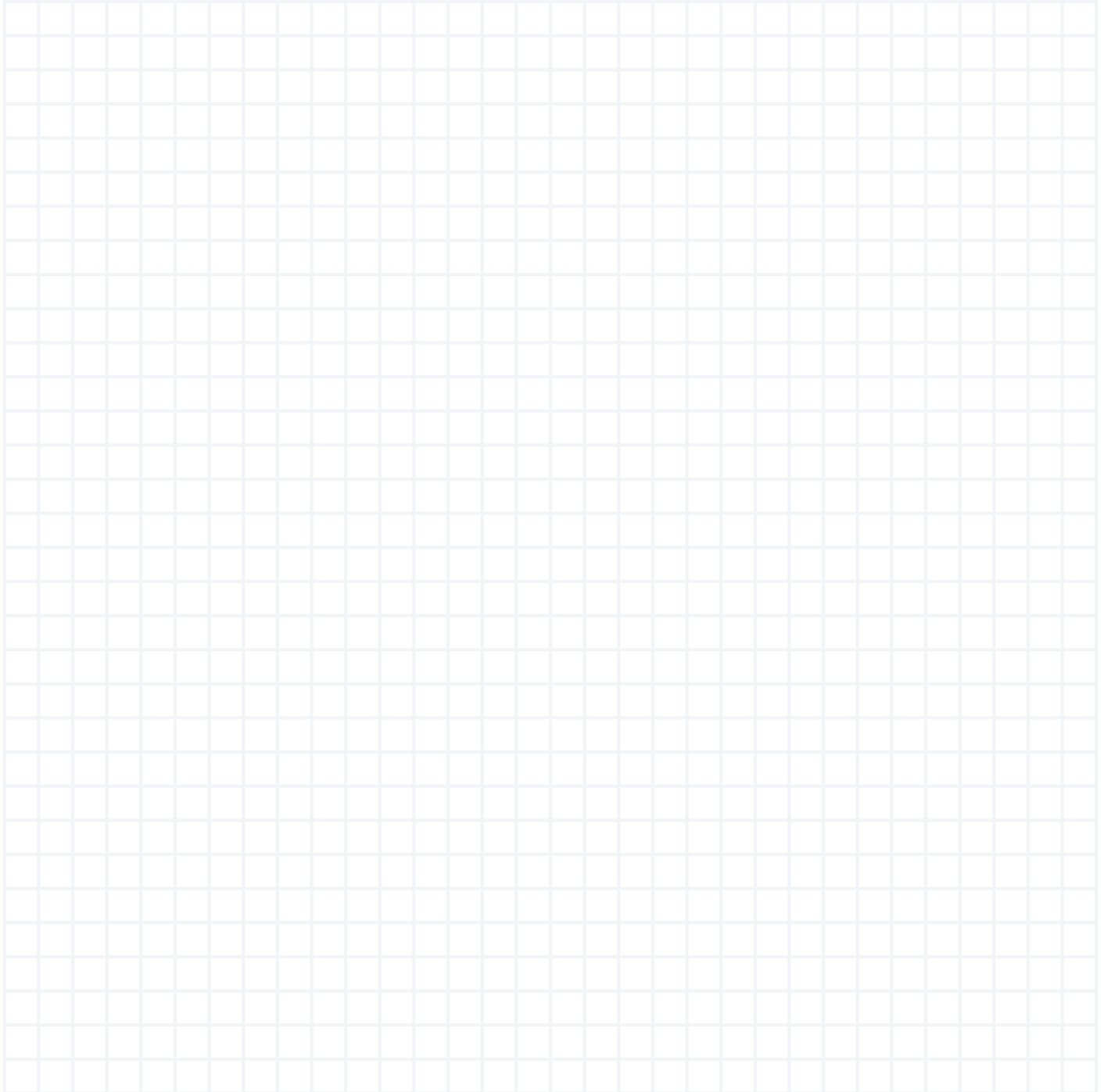




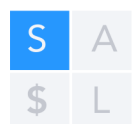
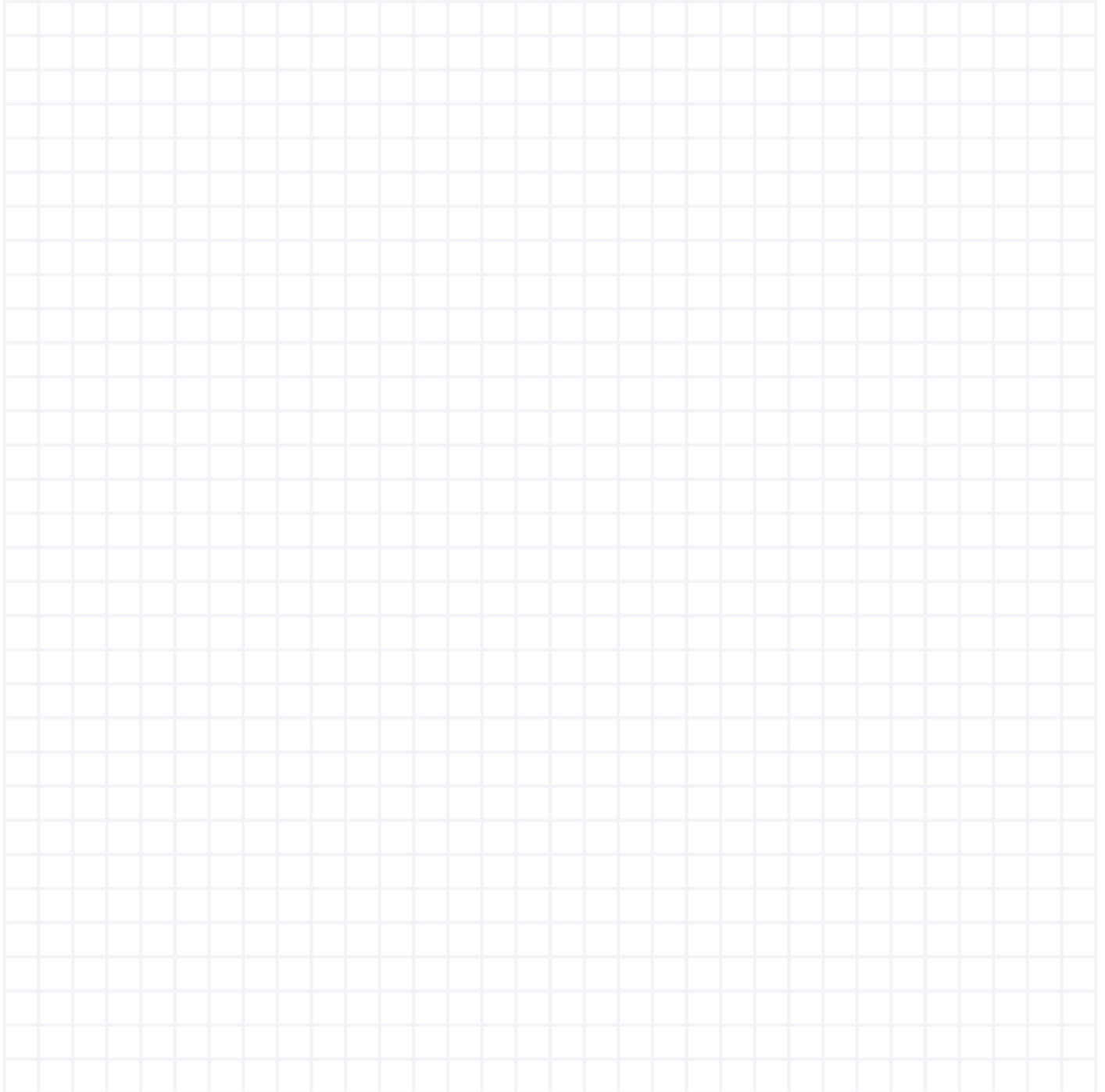
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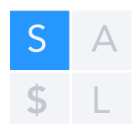
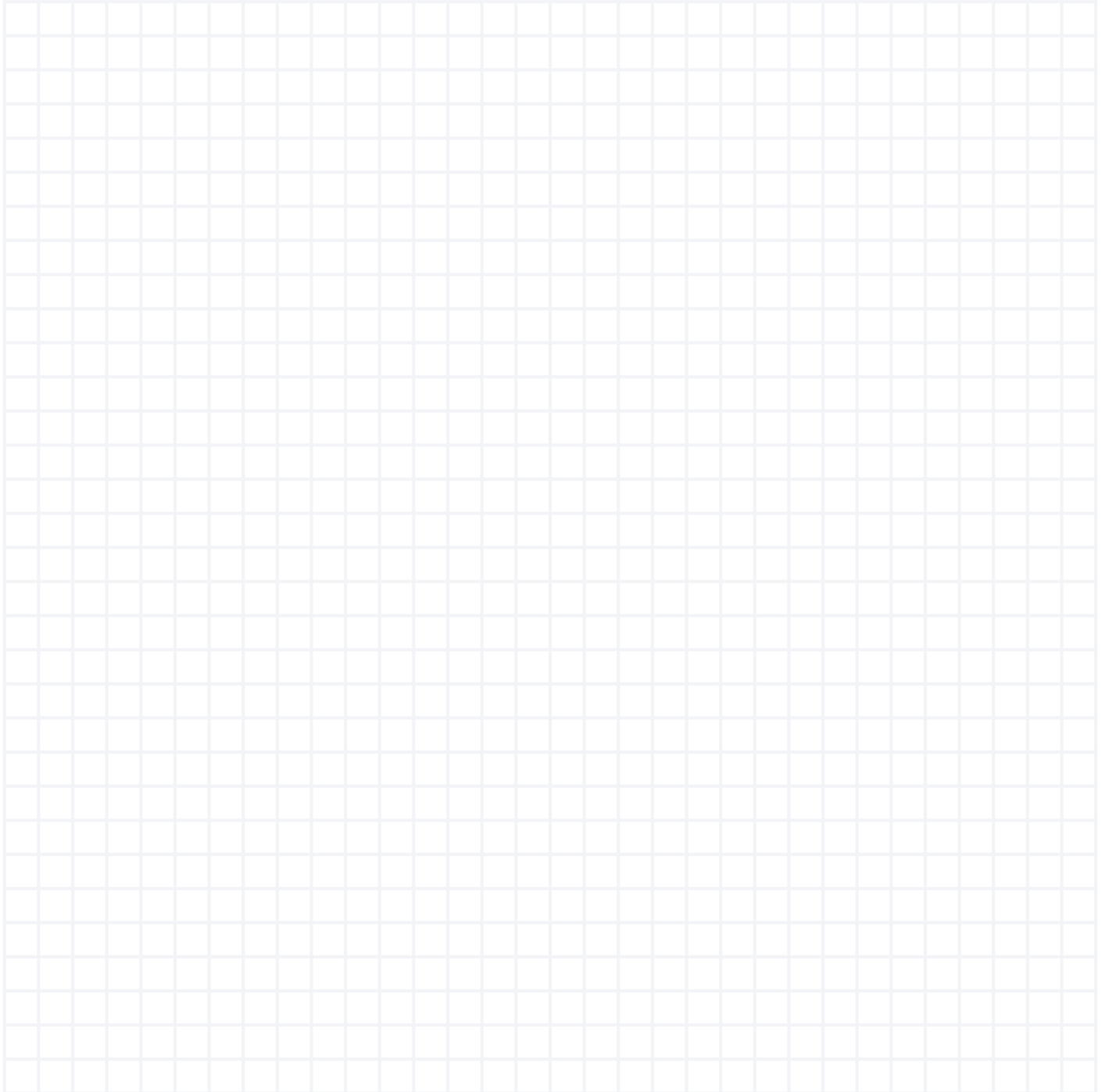
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MTM: \_\_\_\_\_ - \_\_\_\_\_



## TIPS FOR OPTIMIZATION

Always start with an hypothesis (X will Y because Z) or a research question (if Z is true, will X do Y?).

Always question an insight that breaks with better practices. For example, if a testimonial doesn't pull, the insight is unlikely to be "social proof doesn't work for our audience" and more likely to be that the testimonial was too long, not easily visible, too short, from the wrong type of person, lacking a person's photo, etc.

Compare apples to apples.

Control as many variables as you can.

Strategy > List > Offer > Copy is huge for optimization. The easy work is tweaking the copy; the more effective work is backing up to the foundational stuff.

Triangulate the data. Never rely on a single source.

Be careful when using click tracking and scroll mapping. Marketers love to jump to conclusions about what should or shouldn't be on the page based on simply seeing an area of a page that hasn't been clicked. Just because no one clicked doesn't mean the section should be cut!

Know that testing is hard because people behave in weird ways. Because of this, it's usually better to start with a "dramatically different design" that swings for the fences and then scale back. If you try to make tiny iterative changes, you will run a ton of inconclusive tests.

Never draw conclusions from inconclusive tests. Bad data is 10,000x worse than no data.

When trying to figure out what went wrong or right, start closest to the point where the MTM is measured. So if Bounce Rate is unusually high, first look at the top of the page: the URL, the logo placement, the global nav, the eyebrow copy, the headline, the image / video. Only when you've eliminated obvious opportunities should you start zooming out to other things that may be going wrong, such as a pop up that's suddenly triggering within 3 seconds of visitors landing on the page.

