# DIY SaaS Conversion Audit

***How to communicate the real value of your product to your website visitors***

***Make a copy of this doc by clicking on "File" -> "Make a copy" so you can edit it***

Follow this simple 4 steps process to uncover low hanging fruits:

**First**, you will have to define a SINGLE GOAL to keep your focus. You don't want to be all over the place, trying to optimize everything at the same time. It really gets messy if you do that.

**Second**, you will have to select THE most important page for that specific goal. It can be your landing page, App listing page (if your SaaS is a mobile app or plugin).

**Third**, you will do a bit of research (if you haven't already) to pinpoint THE THREE most important benefits of your SaaS**.**

**Fourth**, have a look over the most important page for your goal and fix the messaging to reflect the 3 benefits.

## Remember, people want solutions!

Make sure your copy clearly explains what people get by choosing your product.

## Real-world examples

Calendly: *"Calendly helps you schedule meetings without the back-and-forth emails"*

Mealime: "*Meal planning made easy*"

LightShot: *"The fastest way to take a customizable screenshot"*

Carrd: *"Simple, free, fully responsive one-page sites for pretty much anything."*

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## Step 1 - What's your main goal?

For this audit to work, you have to pick a single focus KPI.

*Are you trying to get more demo requests? Or maybe you want to increase the number of free trial sign-ups.*

Type out the answer down below. You will look at your website with this goal in mind.

**What's your main goal?**

*example: "Increase sign-ups"*

## Step 2 - What's the most important page for <your goal>?

Now that you have a clear goal in mind, figure out what's THE page that's making it happen.

*If most sign-ups take place on your homepage, that's THE page you want to focus on.*

Type out the answer below. Keep in mind that focus is everything so you have to pick one page and one goal. You want users to take a SINGLE action on that specific page

**What's the most important page for <your goal>?**

*example: "homepage"*

## Step 3 - What are 3 things about your Saas that customers love?

You have a goal and a page written down. Now it's time to figure out what are the 3 most important benefits of your SaaS.

This step is really difficult for in-house people because they are stuck **inside** the box. *I know this sounds like a cliche, but it's actually true.*

Here is the proof:

**What does your SaaS do? *(in a single line of text)***

**My Saas is:** *Creating an easy to translate order tracking page for Shopify Stores.*

Based just on that statement, is a user capable of understanding:

- Who is it for? "*Shopify Stores*"
- What does it do? *"Creates an easy to translate order tracking"*
- What do they get? *"An order tracking page"*
- What's special about it? *"The order tracking page works regardless of the store's language"*

That's just 1 of the 3 benefits Shopify merchants get by downloading EZ Order Tracking (*our app*).

Don't sweat if you were not able to come up with a benefit on the spot (remember that you need 3 of them). After all, this is what this audit is for.

We have put together a process that makes it crazy easy to come up with **at least** 3 benefits.

First, you get the actual data, then you add everything in a table, and lastly, you make it sound better.

## Get the data

1. Write down a bunch of words that describe your SaaS.

*Example: order tracking page, Shopify merchants, translation ready, automated notifications, built-in emails, Klaviyo integration, fast loading time, shipping status overview.*

2. Ask your users (for real, just ask them).

*Send out an email asking them why they use your product. Use your in-house email system or go with Hotjar.*

3. Get all your reviews in one Google Sheet, copy and paste everything in a Word Cloud tool.

*We use Word Clouds but feel free to use anything else. Some words will be bigger than others, pick the 3 to 5 biggest ones.*

## Add it to a table

Go ahead and add everything in this table:

| Your own words | Your users' words | Most used words in reviews |
|---|---|---|
| *Example:*<br><br>*order tracking page,*<br>*Shopify merchants,*<br>*translation ready,*<br>*automated notifications,*<br>*built-in emails,*<br>*Klaviyo integration,*<br>*fast loading time,*<br>*shipping status overview.* | *Example:*<br><br>*I like how easy this is to set-up, just install and it's ready.*<br><br>*This app makes it so easy for me to translate my order tracking page in Spanish.* | *Example:*<br><br>*Easy,*<br>*Tracking,*<br>*Klaviyo,*<br>*Emails* |

Just with a single look over that table, you get what this SaaS is about, how it helps people, and most importantly, what are **the 3 main benefits** we keep on talking about.

## Make it prettier

All that's left for you to do is make it prettier, like in the first example.

Here is yet another table you have to complete. *Don't go over the one line limit!*

| | |
|---|---|
| **Benefit 1:** | *Create an easy to translate order tracking page for Shopify Stores.* |
| **Benefit 2:** | *Notify customers about shipment status with built-in emails.* |
| **Benefit 3:** | *Connect EZ Order Tracking with Klaviyo for limitless email customizations.* |

There you go, now you have 3 of the most important benefits (or rather *fetearenefits i.e. features that benefit users*).

These are a combination of what you know your SaaS is doing, what people think it is doing, and what happy users love about it.

## Step 4 - Fix your messaging

The foundation is ready. You got the goal, the page, and 3 things that make your SaaS shine. It's time to mix them all up.

Before that, you have to keep in mind these extremely important pointers that make a page convert:

- It has a ***single goal***;
- It ***clearly shows why*** your product is awesome;
- It ***gives*** users ***a reason*** to do what you want them to do (i.e. to achieve the goal).

Now go and have a look over your page, does it have a single goal? Some pages have both the "request a demo" and "start a free trial" buttons.

Other times, you ask people to "request a demo" in your hero section (i.e. the first thing they see on the top of the page) but later on ask them to "sign-up for free".

You started this audit by focusing on a single goal, so make sure your page does the same.

Next, you want to have a look over the copy of your page, how you explain your featurenefits and why your SaaS is awesome.

If you have enough traffic, run an A/B/C test featuring the 3 best things about your SaaS you found earlier. *In our case, we could only test 2 of them.*

But if you don't have enough traffic to do that, just go with the most powerful one. You want to integrate the other 2 things in the subtitle.

Fill them out in the table below:

| | |
|---|---|
| **Title:** | *Create an easy to translate order tracking page for your Shopify Store.* |
| **Subtitle:** | *Notify customers about shipment statuses with built-in emails or simply connect EZ Order Tracking with Klaviyo for limitless customizations.* |

Now the title and subtitle clearly show what your SaaS is doing, who it is made for as well as why people should use it.

Of course, there are a lot of other things that go into a great hero section, like what image to use, maybe a video is better, or simply just text. But your title and subtitle help people really understand what you are doing.

You should also have a single actionable button that will guide users towards your desired goal. *Like "Sign-up for free".*

Moving on, your page needs to answer your users' questions (*before they think of them*). You should never allow people to doubt **any** of your statements.

Since your title and subtitle are making bold claims, your page needs 3 sections featuring explanations. You don't even have to leave this doc to write them down, as (*you've guessed)*, there is another table below:

**Benefit 1:** *Create an easy to translate order tracking page for Shopify Stores.*

*example:*

*Your business is unique and so is your website. With EZ order tracking you can customize everything on your order tracking page:*

*- Easily change all colors to reflect your own brand.*
*- Rewrite any piece of text so it matches your brand voice.*
*- Translate the entire order tracking page in any language you want.*

*It's really simple: if it's part of the order tracking page, you can change it!*

*On the other hand, you can just install the app and leave the default values on. It will take you no more than 2 minutes to have your own order tracking page ready to share.*

**Benefit 2:** *Notify customers about shipment status with built-in emails.*

*Use the email feature to let your customers know about the most important updates regarding their orders.*

*You can customize:*

*- the subject line;*
*- the email body text;*
*- how often the emails are delivered.*

*Moreover, you can also opt in to receive emails once each order has been successfully delivered. That way you can rest assured that your customers got what they ordered.*

*We will also add SMS notifications in the future, so stay tuned.*

**Benefit 3:** *Connect EZ Order Tracking with Klaviyo for limitless email customizations.*

*Already have an email system in place?*

*EZ Order Tracking can connect with your Klaviyo account and send all shipment information straight to your dashboard.*

*Use the Klaviyo's built-in automatic emails tools and let your customers know where their package is.*

*Pro tip - increase the number of reviews you get by sending an email **after** your clients receive their order.*

You should add another CTA button right below the 3rd section. Because people spent time reading through all your copy until now, there is a higher chance that they will convert.

***Head over to chillital.com if you need any help and just drop me a message.***