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# PERSUASION ARCHITECTURE™

## PERSUADING CUSTOMERS WHEN THEY IGNORE MARKETING

WITHIN

### **What Persuasion Architecture Can Mean for You**

*An executive summary describing the nature of Persuasion  
Architecture and its value to your business*

### **The Persuasion Architecture White Paper**

*An overview of the business philosophies behind Persuasion  
Architecture with an explanation of its processes and applications*

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Written by Lisa T. Davis

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## INDUSTRY EXPERTS TALK ABOUT *WAITING FOR YOUR CAT TO BARK?* AND *PERSUASION ARCHITECTURE™*

These guys really “get it.” In a world of know-it-all marketing hypesters, these guys realize that it takes work to persuade people who aren’t listening. They’ve connected a lot of the pieces that we all already know—plus a lot that we don’t. It’s a rare approach that recognizes that the customer is in charge and must be encouraged and engaged on his/her own terms, not the sellers’. It takes apart the persuasion process, breaks down the steps and gives practical ways to tailor your approaches to your varying real customers in the real world. This book is at a high level that marketers better hope their competitors will be too lazy to implement.

**GEORGE SILVERMAN**, AUTHOR OF *THE SECRETS OF WORD OF MOUTH MARKETING: HOW TO TRIGGER EXPONENTIAL SALES THROUGH RUNAWAY WORD OF MOUTH*

We often hear that the current marketing model is broken—meaning the changes in customers, media, distribution and even the “flatness of the world” make current practices no longer relevant. Yet few have offered a solution. This book recognizes the new reality in which we operate and provides a path for moving forward. The authors do an outstanding job of using metaphors to help make Persuasion Architecture clear and real life examples to make it come alive. Finally, someone has offered direction for how to market in this new era where the customer is in control.

**DAVID J. REIBSTEIN**, WILLIAM STEWART WOODSIDE PROFESSOR, WHARTON BUSINESS SCHOOL OF THE UNIVERSITY OF PENNSYLVANIA AND FORMER EXECUTIVE DIRECTOR, MARKETING SCIENCE INSTITUTE

Virtually all web sites have a persuasive purpose. To change what people think and do online, you need to first clarify your target outcomes and then make sure everything leads to those outcomes. Thousands of design firms can create beautiful and usable websites; few firms really understand how persuasion works.

**BJ FOGG**, STANFORD PERSUASIVE TECHNOLOGY LAB AND AUTHOR OF *PERSUASIVE TECHNOLOGY: USING COMPUTERS TO CHANGE WHAT WE THINK AND DO*

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The Web is a democratizing force as the world's largest global brain. It educates everyone on the pros and cons of every product, service, and even person. An educated person doesn't react well to the traditional "art of manipulation" that most marketers attempt to employ in their campaigns. As a matter of fact, it makes them angry and defensive – like a cat backed into a corner. No one understands this new world of marketing better than the Eisenbergs.

**BRETT HURT**, FOUNDER AND CEO OF BAZAARVOICE, FOUNDER OF COREMETRICS AND SHOP.ORG BOARD DIRECTOR

In 1999, the Wachowski brothers revolutionized moviemaking with stunning new angles and special effects revealed in *The Matrix*. Now the Eisenbrothers have done the same for business in *Waiting for Your Cat to Bark?* Stunning new angles! Techniques that will be copied for decades. *Cat* is sure to be remembered as the genesis of an important new direction in marketing.

**ROY H. WILLIAMS**, NEW YORK TIMES BESTSELLING AUTHOR OF THE WIZARD OF ADS TRILOGY

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# PERSUASION ARCHITECTURE™

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## WHAT PERSUASION ARCHITECTURE CAN MEAN FOR YOU: AN EXECUTIVE SUMMARY

- One of the world's largest diamond wholesalers revamped their site and increased visitor conversions from .86% to 54.1%, an increase of over 5500%.
- An ebusiness that helps people sell customized merchandise reduced their shopping cart abandonment rate from 35% (already low by industry standards) to just 15%.
- A re-seller of broadband services reported a 60% increase in their order pipeline, a 419% increase in conversion and a 13% increase in gross margin, with sales up over 100%. Their Web site sets new records month after month and has done so for over a year.
- One of the world's largest manufacturers of construction equipment improved their web analytics reporting and were able to increase their conversion rate by over 700%.
- The Web site for an entrepreneurial firm specializing in custom Yellow Page ad design originally delivered an average of 6 leads a month. It now delivers an average of 37 a month – an increase in conversion of over 600%.
- One of the world's largest staffing firms wanted to increase their conversion rate of 3-4% for first-time visitor New Accounts on their resume submission site. They achieved a conversion rate of 27.93%.
- A popular theme park increased their website's conversion rate by 80%.

These are not typographic errors. These businesses and many others with diverse applications and needs, experienced dramatic, sustainable increases in their conversion rates. What have they done that sets them apart from the abysmal industry standard?

Each of these businesses applied the principles of Persuasion Architecture™, developed by Future Now, Inc. and its subsidiary, Persuasion Architecture, Inc., to their online and offline marketing efforts.

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Each of these businesses made a choice not to settle for incremental changes that deliver tepid results. Instead, they opted to employ an integrated methodology that delivers dramatic results.

Each of these businesses was willing to examine conversion from a different perspective. If the industry standard for conversion hovers at 2%, you might ask: How can I increase that number? But this diverts attention from the more relevant question: What am I doing that is driving 98% of my audience away? The effort spent answering *this* question delivers the dramatic improvements that more than satisfy the former question.

Ultimately, each of these businesses has been able to embrace the customer-centric philosophy that is at the heart of Persuasion Architecture.

## **Persuasion Architecture helps your prospect “buy better”**

Persuasion Architecture begins with the premise that the buying decision process and the sales process *must* work in tandem. The solution for dramatically improving conversion rates does not lie in helping businesses “sell better.” It lies in helping businesses marry the sales process to their audience’s buying decision processes—in essence, the business must provide a structure that helps the prospect “buy better.”

For you to achieve your goals, your visitors must first achieve their goals. Only when you help your audience buy better will you be able to sell better.

There is no “average user”

People approach the buying process in different ways—to design for the “average user” is to leave the majority of your audience high and dry.

Persuasion Architecture provides a detailed process for persuading your visitors to take the actions you want them to take. Nothing is left to chance. To provide visitors with the information they want, when they want it, in language that speaks to their individual needs, you design persuasive paths based on personas.

Persuasion Architecture makes it possible for you to:

- Create business-specific personas that reflect the demographic, psychological and topologic dimensions of your audience

- 
- Develop persuasion scenarios that meet the needs of your audience's buying decision processes and your sales process
  - Identify the necessary language that will help you create persuasive copy and rank well in search engine results
  - Integrate your multi-channel marketing efforts, based on the personas you have created, through Persuasion Entities (on- or offline)
  - Establish a structure that allows you to test, measure and optimize your results on a continuing basis, so you can manage intelligently

From a development point of view, Persuasion Architecture and its MAPSuite™ software offer these advantages:

- The process presents a simple-to-follow project management and monitoring methodology
- The process is based on a solid foundation of business “rules” and the principles of cognitive psychology
- The process helps non-experts create persuasive systems
- The process allows non-technical business people to lead and manage the development of the project
- The process is designed to maximize the strengths and minimize the weaknesses of both technical and business people

When you focus on Persuasion Architecture:

- You don't just get more sales -- you get more sales from your existing traffic. You don't need to increase your marketing expenses.
- Your customer acquisition cost goes down.
- Your customer retention rate goes up.
- Your customer lifetime value goes up.

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## Are you ready to let Persuasion Architecture deliver for you?

If businesses ranging from one-person shops to international corporations can apply the principles of Persuasion Architecture to achieve dramatic results, you can too. Our process is proven. It incorporates software applications developed specifically for creating persuasive systems. And it is accessible, even for those who possess no technological expertise.

You can apply Persuasion Architecture to a single area of your business or across the board. What can Persuasion Architecture mean for you? That depends on how much dramatic success you are looking for!

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# THE PERSUASION ARCHITECTURE WHITE PAPER

## INTRODUCTION

This white paper provides an overview of the business philosophies and methodology behind Persuasion Architecture. Within this document you will:

- Learn why selling with buying go hand-in-hand, and how Persuasion Architecture facilitates merging the two processes
- Learn the architectural metaphors for Persuasion Architecture
- Learn the true nature of conversion as both a micro- and macro-level activity
- Learn the phases that comprise the creation of a persuasive system
- View screen shots of the applications we have developed specifically for Persuasion Architecture
- Read what others have to say about their experiences with Persuasion Architecture

Because many of us understand what a Web site is and because Web sites have become the nexus of multi-channel marketing efforts, we have framed our white paper around the example of Web site design. However, the principles and processes described within apply to the creation of all persuasive systems. The true beauty of Persuasion Architecture lies in its ability to integrate and synthesize all your persuasive entities!

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## SOLVING THE PROBLEM

*The definition of insanity is doing the same thing over and over and expecting different results.*

- BEN FRANKLIN

Whether you manufacture paper clips or eye pieces for electron microscopes, whether you sell micro chips or chocolate chips, whether you paint houses or canvases, your business depends on satisfying people.

The needs of the customer have always defined the nature of successful business. We quickly discover that if we want to achieve our business goals, we must do everything in our power to help our potential customers and clients achieve their goals.

The Internet has offered a new venue for this exchange – more than that, it has become the nexus for most marketing activity. It has not, however, changed the fact that conducting business is still about people.

Certainly, managing projects that draw heavily on both business and technical skills is complex. But at a much deeper level, most Web sites fail to construct an intentional persuasive process that meets the individual needs of their visitors. As a result, conversion rates and return on investment (ROI) remain low.

To be successful, your Web site must acknowledge what each of your visitors will ask or require of you, in a manner that is meaningful to them. Without a sense of satisfaction and confidence, your visitors will not feel comfortable taking action. You must provide a process that goes beyond usability's goal of removing functional impediments and information architecture's goal of organizing information. You must transcend a simplistic conception of both your visitor's objectives and the nature of conversion.

Your persuasive process must begin and end with the visitors' point of view.

Creating or redesigning a Web site is an exercise in managing complexity. We call the intentional creation of a persuasive process Persuasion Architecture. At the center of our discipline is MAPSuite,<sup>1</sup> our proprietary software for managing the complexity of a persuasive system.

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Central to Persuasion Architecture is the persona. Drawn from demographic, psychologic and topologic information about your audience, these fully-imagined individuals with specific questions, motivations and needs allow you to design meaningful, productive navigation paths from their point of view.

Persuasion Architecture offers you the only available, fully integrated framework for understanding and applying the principles that comprise persuasive design. It is a structured process that provides the applications you need to create a persuasive, efficient, customer-centric online experience.

In the following pages, we examine the business philosophies behind Persuasion Architecture and review its methodology. While we present this information in the context of a Web site, which was the inspiration for Persuasion Architecture, our philosophy and methodology extend to all persuasive activities. Persuasion Architecture makes it possible for you to integrate and synthesize every aspect of your multi-channel marketing, from banner ads and pay-per-clicks to television, radio and beyond.

We begin by examining the nature of the fundamental exchange in ebusiness – the premise that defines the purpose of our persuasive architectural creation.

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## THE BASIC EXCHANGE

Think beyond the conventional definitions of “buy” and “sell.” We use these terms as a convenient shorthand, but apply them broadly: “selling” is the process through which you accomplish your business objectives; “buying” is the process through which your visitors accomplish their goals and become customers.

At the most elemental level, commercial Web sites come in four flavors – every commercial site you'll come across is a subset or combination of one of these four variations: e-commerce, content, lead-generation and self-service.

- **E-commerce sites.** The objective is increase sales and decrease marketing expenses.
- **Content sites.** The objective is increase readership, level of interest, and time spent on the site.
- **Lead-generation sites.** The objective is increase and segment lead generation.
- **Self-service sites.** The objective is increase customer satisfaction and decrease support inquiries.

Different though these business objectives might be, every online business has these elements in common:

- Each business has an ultimate conversion goal
- Each business has a series of steps that ideally help folks achieve that ultimate conversion goal
- Each business has an audience made up of folks who have their own agendas and their own ways of satisfying their agendas

### You Sell

It doesn't matter what you are trying to accomplish on your Web site – whether you want to provide shoe laces to the public or to local shoe repair shops across the country or to shoe manufacturers, whether you want to offer Tonka trucks to Sally's parents or high-end earth-movers to We Dig It, Inc., or whether you want to promote consultancy serv-

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es aimed at helping other business do their business better – you are selling. You are trying to persuade someone, or a group of someones, that you’re the best thing going in the market. You want them to do business with you.

Toward which end, you have a sales process<sup>2</sup> - steps you go through to achieve a “close.” Not every business has the same sales process, but every business has a sales process (admittedly some are more effective than others). Only *you* care about your sales process. It’s internal. It’s about you and your goals. It is *not* about your audience and their goals.

## They Buy

It doesn’t matter who your audience is – a fun-loving fellow looking for the ultimate experience in a gaming joy stick or a street savvy CEO looking to expand telephone services into untapped markets – your Web site has to understand and respond to how your audience buys whatever it is you offer. You must be able to understand their needs, anticipate their questions and provide the information that helps each one make a decision (actually, lots of decisions!).

Everyone in your audience has a buying decision process<sup>3</sup> - steps they go through on their way to satisfying their needs and achieving confidence that they made the right decision. Sometimes this buying process happens in the blink of an eye. Sometimes it takes six months. Sometimes it takes only one person to make the decision. Sometimes the decision requires input from a significant other. Sometimes five different departments and a C-level executive have to sign off on the decision.

## The Classic Sales Process

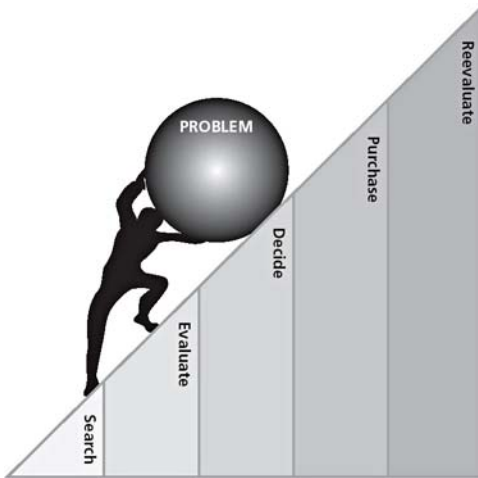


In general, most sales processes include these steps:

1. Prospect
2. Rapport
3. Qualify
4. Present
5. Close
6. Post-sales evaluation

The process is rarely linear – rapport is developed throughout the sales experience; qualify and present are frequently iterative.

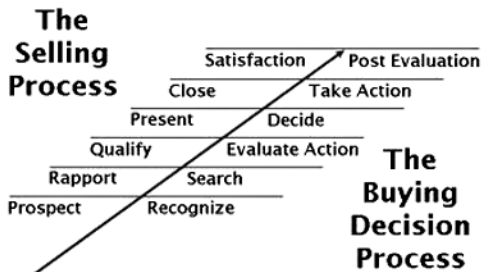
## The Classic Buying Process



The typical buying process generally incorporates these phases:

1. Recognition
2. Search for information
3. Evaluation of action
4. Purchasing decision
5. Purchasing action
6. Post-purchase evaluation

## The Twain Must Meet



Your visitors don't care about your sales process (and everything about your sales process should be designed so they shouldn't have to care) – remember, your sales process is all about you. But you definitely have to care about how they buy. The key to a persuasive site is to map their buying processes to your selling process, refining your sales process when it becomes intrusive or counterproductive.

Persuasion Architecture creates an experience that leads your visitors to find what they want by acknowledging that these two processes – buying and selling – occur in tandem and take place on every page of a Web site.

In an ideal world, selling and buying take place between people in a space designed to accommodate the needs of both parties. Let's turn to the architectural metaphor that helps us understand creating a persuasive arena for ebusiness.

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## THE ARCHITECTURAL METAPHOR

### I Need an Architect??

To reinforce the value of a synthetic coordinator, one woman created a seminar demonstration:

*I split the content developers up into 6 groups and had each group pick a room in a house and ‘design’ it. They picked the type of room, size, color, scheme, style and layout, and drew it on a piece of paper. I then had one representative from each group try to put a house together using those rooms. Needless to say, we ended up with no bathrooms and 3 living rooms and a huge mess. I explained that there needed to be someone ‘designing the house’ first - an architect, if you will ... I’d never seen so many light bulbs go on.*

Architecture has always been a self-conscious, intentional discipline in which the relationships between environments and those who use them have been examined in great detail. Successful architecture must integrate structural considerations, serve the needs of the client (the purpose of the structure) and acknowledge the behaviors of all the people who use the spaces within.

Certainly, persuasion in architecture isn't a revolutionary idea. A century ago, Frank Lloyd Wright wrote:

*A building should contain as few rooms as will meet the condition which give it rise and under which we live, and which the architect should strive continually to simplify; the ensemble of the rooms should then be carefully considered that comfort and utility may go hand in hand with beauty.<sup>4</sup>*

Wright’s observations become relevant to us if we replace “Web site” for “building.” Spinning out this analogy, we could then consider “rooms” as Web pages and “doors” as calls to action. We can think of “nature, comfort and utility” as functionality. The “materials” we choose – not wood, brick or stone, but those circumscribed by the inherent character of our medium.

For addition architectural parallels to the interface between user experience and environment, we can also look to the development of landscape architecture, particularly through visionaries like Frederick Law Olmsted (best known for his role in shaping New York City’s Central Park).<sup>5</sup>

*Olmsted applied these principles of separation and subordination more consistently than any other landscape architect of his era. Subordination was accomplished in his parks where carefully constructed walks and paths would flow through landscape with gentle grades and easy curves, thus requiring the viewer's minimal attention to the process of movement. At the same time, many of the structures that Olmsted incorporated into his parks merge with their surroundings. Separation is accomplished in his park systems by designing large parks that were meant for the enjoyment of the scenery. Smaller recreational areas for other activities and where "park ways" handle the movement of pedestrians and vehicular traffic offset these large parks.<sup>6</sup>*

## Or Think of a Book – But Not Just Any Book!

One reader supplied a different Persuasion Architecture metaphor for us:

*I can't help but think of persuasion architecture as one of those multiple choice ending books that I last read twenty years ago - 'turn to page 121 if you think A, turn to page 84 if you think B...' etc. There are a number of scenarios on each page and a persuasive writer would be able to channel readers towards the right decision.*

Reading a book isn't exactly the same as working your way through an ebusiness Web site, but this insight is a remarkably clever way to describe what Persuasion Architecture accomplishes: helping your visitors to achieve their goals in the ways that suits them best.

Persuasion Architecture helps you develop individual narratives (navigation paths) within your conversion system that let folks interact with you in ways that are meaningful to them. These make it more likely folks will take action on your site. These will improve your conversion rates.

Even more explicitly, the purpose of landscape architecture was to create space that shaped and guided the “user’s” experience. Intention was integral to the design – when you stepped in one direction, you were supposed to see this; when you moved further down that path, you were presented with a secretive opening you simply couldn’t resist investigating.

In “Learning from traditional architects,” Lorraine Johnston discussed the historical changes in the role of the architect and described the task of the “new architect”:

*For an architect called on to design a hospital, it is important that every detail of the working of the hospital is known early. Space cannot be allocated or even the firm of the buildings conceived until the people responsible for wards, kitchens and operating theatres, say, have been able to explain their requirements. ... Only after all the preliminary work is done for the hospital can an architect decide whether a small number of multi-storied buildings would suit better than a series of lower connected buildings. Up to this point there is no physical shape for the building nor any architectural character. ... the visible form and the aesthetic quality for the building will emerge as part of the problem-solving, in contrast to the earlier approach of starting with a preconceived image and fixing the functionality to suit.<sup>7</sup>*

Johnston’s ethic for the modern architect parallels our own needs in developing for persuasive systems:

*The way clients are looking to the future requires that we study our client’s situation more than we have ever done before. If we are to succeed, we must learn a great deal about how clients are organized and what strategies underlie their way of doing business.*

Brick-and-mortar retailers have incorporated their own form of “persuasion architecture” in stores for decades. Nothing is left to chance: milk in the back of the store, the aroma of bread baking, the layout of the aisles, and the location of products on shelves are all planned to attract attention, gain interest, stimulate desire, and persuade you to navigate the store the way retailers want you to.<sup>8</sup>

Because you cannot make people take action, you must *persuade* them. In fact, *every* action you motivate depends on the ability of your Web site to persuade.

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## MAPPING SUCCESS

*If I were given one hour to save the planet, I would spend 59 minutes defining the problem and one minute resolving it.*

- ALBERT EINSTEIN

The architecture industry enjoys a high project success rate – time, cost of materials and labor, and the fact that people’s lives are at stake when buildings collapse have something to do with it. Architects and construction companies spend tremendous amounts of time *planning* and *thinking* long before the first foundation stone is laid.

If you were building a new house, you wouldn’t call in the building crew on the very first day of the project to begin construction, then pop around each day to tell the foreman what to change from the day before. You don’t need to select bathroom tiles before you’ve bought the building lot.

You’d begin by evaluating the location, testing the soil for contamination, determining how you were going to supply yourself with water and septic, deciding the orientation of each structure you plan to build. Then you would turn to pen and paper, creating a plan that considered all the functions and features you wanted, and how they could be arranged. Once you had a general plan, you would start filling in the details – lighting and wiring, plumbing, windows, style, specific materials. As construction proceeds, situations you couldn’t anticipate inevitably crop up. But to keep budget, time and sanity under control, you anticipate and document as much as possible in advance.

The best way to manage the complexity of creating a persuasive system is through well thought-out and well-documented iterative phases. Persuasion Architecture incorporates a methodology for implementing the planning, design, development and optimization of your Web site. It insures you start with a solid foundation that persuades your visitors more effectively and allows you to measure activity so you can manage more intelligently.

Persuasion Architecture offers these advantages:

- The process presents a simple-to-follow project management and monitoring methodology

- 
- The process is based on a solid foundation of business “rules” and the principles of cognitive psychology
  - The process facilitates the ability of non-experts to create persuasive systems
  - The process allows non-technical business people to lead and manage the development of the project
  - The process is designed to maximize the strengths and minimize the weaknesses of both technical and business people

Further, Persuasion Architecture makes the design process concrete through a series of software applications designed and developed by Persuasion Architecture, Inc. The MAPSuite applications reinforce the philosophy of our process through flexibility, a non-technical focus and the ability to manage iterative development from multiple creative sources.

## The Essential Questions

The persuasive system you create allows you to carry on a dialog with your visitors. Preparing for this dialog starts with your answers to the three essential questions that arise from the activity of marrying your selling process with their buying process:

- **Who needs to be persuaded?** When you know who you need to persuade, you can create personas that allow you to design meaningful navigation scenarios.
- **What actions does this person need to take?** Not all actions will be direct functions of your sales process; many will be actions your personas need to take to satisfy their buying decision process.
- **How will you most effectively persuade that person?** Knowing “who” and “what” helps you create persuasive copy and content.

Always keep these three questions at the forefront of your mind—they will frame every other question you ask and underlie every decision you make about the design of your persuasive system.

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## The Nature of Your Prospects

You want to encourage the people who come to your site to engage—and stay engaged—in your dialog. Toward this end, it helps to understand the commonalities among your online audience—the traits all your prospects share.

Every one of your visitors is a voluntary participant in the process, possesses some degree of propensity to buy and has a personality.

### *Voluntary Participants*

Every individual actively makes a choice to come to your Web site. And they arrive, task in mind, prepared to participate. While they remain on your site, they agree to continue participating in a persuasive dialog with you. This is critical knowledge: behavior on ebusiness sites (fundamentally a self-service environment) is voluntary, participatory and goal-directed. Save for those who land on your site by mistake, your visitors are already interested in you and are there for a reason. And they are completely in control of what they will or will not agree to experience. If your visitor refuses to take the next click on your site, your dialog is over. It is essential to remember you are always one click away from goodbye.

Your visitors:

- Control their experience
- Are goal-oriented
- Are highly fragmented
- Are volunteers
- Are involved in a self-service environment
- Must participate to accomplish their tasks

### *Propensity to Buy*

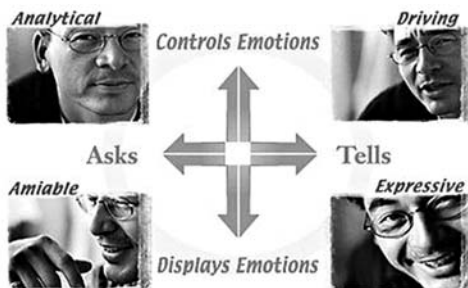
We can identify four categories of visitors based on their level of motivation and their readiness to make a decision.

- First are the perfect prospects who know exactly what they want. Think of a self-actualizing buyer seeking features, brands, and model numbers.

- Second are prospects who sort of know what they want. Think of shoppers with a strongly felt need but who have not yet narrowed down their search criteria.
- Third are prospects who aren't sure they want anything but might buy if what they want were to appear. These are window-shoppers. They have no strongly felt need in mind, but one could be suggested to them.
- The fourth group of visitors don't qualify as prospects, nor are they "qualified" to take advantage of the product or service. They're there by mistake. Be happy when they exit gracefully.

You don't know where your visitors are in the process when they land on your site, so your site must be prepared to deal with all possibilities. It also helps to consider that not all your visitors will make a decision when they first visit your site—sometimes a successful conversion is the result of multiple visits.

## Personality

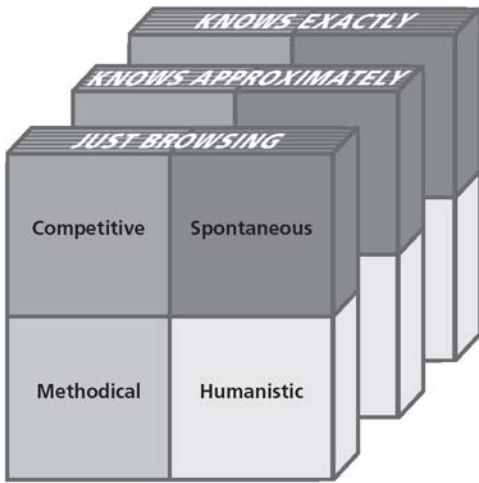


Every one of your visitors has one, and that personality influences the choices they make, the questions they ask and the information they look for to feel comfortable making a decision. Although it may seem impossibly complex to categorize infinite variation, almost every philosopher has concluded there are four dominant personality types. For Hippocrates it was Sanguine, Choleric, Phlegmatic and Melancholic. Jung chose to call his types Feeler, Thinker, Sensor and Intuitor. Keirsey calls them Idealists, Rationals, Guardians and Artisans.

We use the names Competitive, Spontaneous, Methodical and Humanistic. Every one of your visitors will have a predominate personality type that fits into at least one of these categories.

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*The Universe of Buyers*



Combine the possible stages of the buying decision process with the dominant personality types, and you effectively describe your universe of buyers.

# THE PHASES OF PERSUASION ARCHITECTURE

Persuasion Architecture has six phases. The process begins with Uncovery, continues with Wireframing, Storyboarding and Prototyping, then enters the actual coding phase in Development. The final phase provides for testing, measuring and optimization, an ongoing process that insures your management decisions are always based on solid information. The following pages describe each phase of Persuasion Architecture in more depth.

## 1. Uncovery

### UNCOVERY

- Identify business objectives
- Identify value of business to prospects
- Identify sales process
- Identify buying process
- Merge sales process with buying process
- Identify strategies for achieving objectives
- Identify keywords and key phrases
- Identify the dimensions of knowledge, need, risk and consensus
- Define personas
- Construct narratives

The goals of Uncovery are to identify the value of the business and articulate it in a way that matters to the customer, as well as evaluate the nature of the buying process and the characteristics of the visitors. Uncovery includes identifying the business objectives for your persuasive system, developing strategy, and researching keywords and key phrases, all of which aid us in creating the best merger between selling and buying for your situation.

Toward the end of the Uncovery process, we start creating personas that give you insight into your customers' buying process and help you understand each customer's individual needs, wants and desires. Uncovery concludes by creating narratives, stories of the experiences your personas will have as they interact with your persuasion entity.

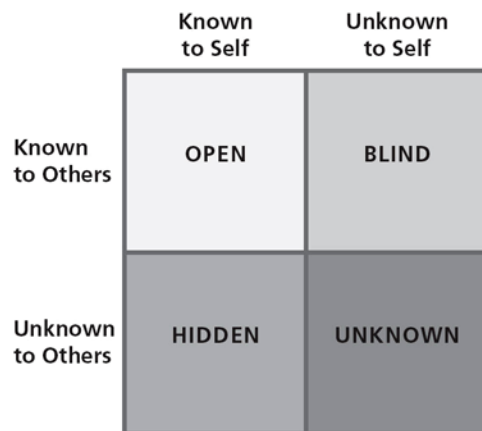
Skillful Uncovery requires careful attention; it is the critical first step toward designing and developing effective persuasion architecture.

The screenshot shows the 'Persuasion Architecture' application interface. At the top, there's a navigation bar with 'Uncovery', 'Wireframe', 'Storyboard', and 'Admin' buttons. The main content area is titled 'Summary' and contains sections for 'Company Core Values', 'About Customers', and 'Competition'. The 'Company Core Values' section includes a bullet point: 'What's important at Wedding Day Diamonds? We believe that in order to create a great organization we need to guide our people with intense focus on the values that guide our people. These are our "Core Values and beliefs". Please let us know if we don't live up to them. We respect the individual, and believe that individuals who are treated with respect and are given responsibility respond by giving their best. We require complete honesty and integrity in everything we do. We make commitments with care, and then live up to them. In all things, we do what we say we are going to do. Work is an important part of life, and it should be fun. We love to compete, and we believe that competition brings out the best in us. We give our best effort to everything we start and follow it through to the end. If a decision made is not beneficial to our company and it's clients, we don't wait our time. We will change quickly and efficiently to always strive to be the best that we can be. We see a huge difference between good mistakes where a person gives his or her best but fails and bad mistakes where a person fails because of lack of attention. Understanding our goals and helping each other achieve those goals. We are believers in the Golden Rule. We will always be friendly and courteous and fair with our dealings. We will always have urgency in dealing with our clients and their happiness.'

*Persuasion Architecture's Uncovery Application*

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## A Model for Self-Disclosure

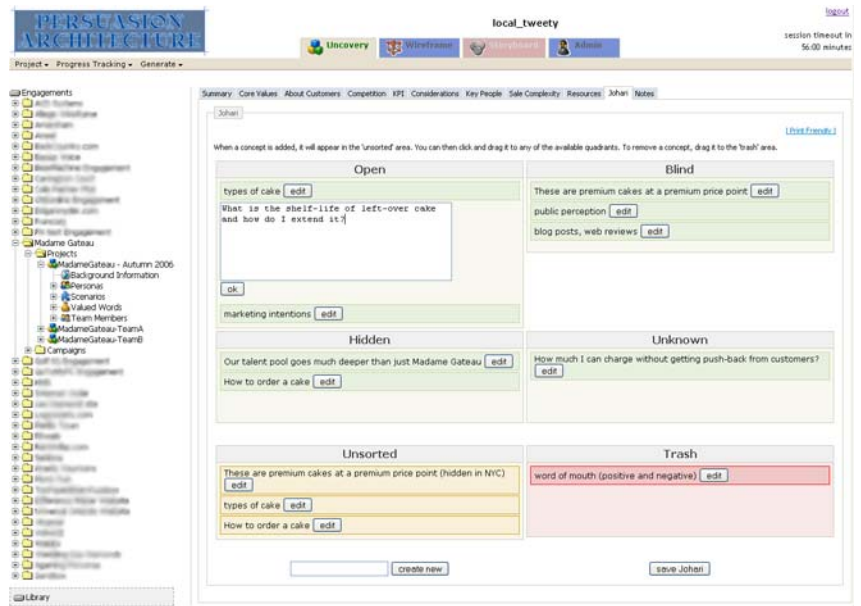


Uncovery is an exercise in self-disclosure. In part, the exercise rediscovers what you know about your own business and articulate to your prospects. More importantly, it uncovers the critical information you know about your business and need to articulate to your prospects to influence their perception of your value to them.

The Johari Window provides a useful model for Uncovery. Named after its inventors, Joseph Luft and Harry Ingham, it describes knowledge relationships in human interaction. A four-paned "window" divides levels of awareness into four types: open, unknown, blind, and hidden. As mutual familiarity increases, the lines dividing the four panes move to reflect the changes in the relationship.

When we apply the Johari Window to Uncovery, the business is "self" and the customers are "others." Let's describe the relationships:

- **Open.** The open quadrant represents information you and your customers know about each other. Early in the relationship, the size of this quadrant is small—here has been little time to exchange information. As you and your customers become more familiar with each other, the dividing line moves down or to the right, placing more information into the open window.
- **Unknown.** The unknown quadrant represents information that neither party knows about the other. While it is not impossible to discover something neither the business nor its customers know about the relationship, it is very unlikely. Pursuing this area is rarely a productive effort.
- **Blind.** The blind quadrant represents information you do not know about yourself, but the other party does know. A necessary part of uncovery is to identify what is known to the customer that must be revealed to the business.
- **Hidden.** The hidden quadrant represents information you know about yourself but your customers not know. Uncovering this hidden information so we can move it into the open quadrant is very often the key to a great uncovery.



*Persuasion Architecture's Johari Editing Application*

It is virtually impossible for any business to achieve comprehensive self-disclosure on its own—as we say, you can't read the label from inside the bottle. When it comes to issues in which we have a huge personal investment—our children, our homes, our businesses—we risk losing our objectivity. It's then we risk pushing our own interests at the expense of our customers' interests. The most successful uncoveries benefit from the objective perspective of someone outside the bottle.

### *The Militating Factors in Your Sale*

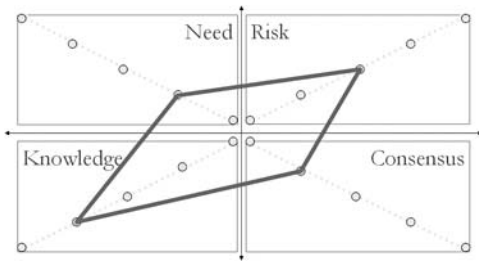
Certain factors pertain to the buying decisions your audience makes – without appropriate and relevant information that addresses these factors, most people will not feel sufficiently confident to make a decision. Understanding these factors is critical to shaping your persuasive process – they are considerations we address during Uncovery:

- **Knowledge.** How difficult is it for people to understand the nature of your product or service, or the procedures for buying? What do they need to know? Your persuasive process must eliminate the friction generated by confusion or lack of knowledge. Knowledge dimensions for the buying decision can differ based on who is doing the buying: is the customer buying for herself (she will be the end user) or is she buying on behalf of another (as in the case of a purchasing agent)? The knowledge assumptions and language – especially jargon – that work for one may be totally inappropriate for the other.

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- **Need.** How urgent is the need for your product or service? How fast are people likely to make their decisions to buy? Will the need be satisfied by a one-time purchase (either impulsive or momentous) or is the need on-going? Folks might be willing to compromise their thoroughness for a casual one-time deal. But if that one-time deal is something like a house, or if they are choosing a long-term relationship to satisfy an on-going need, things get significantly more complicated.
  - **Risk.** How risky, especially with respect to issues of finance, is the sale? While price may not be an ultimate decision factor in a purchase (for many, safety and trust trump price), increasing financial risk necessitates a more intricate persuasive structure. Risk may also be associated with compromises to health, as when individuals or medical professionals have to make treatment choices. Or even when someone simply evaluates the safety of an herbal remedy.
  - **Consensus.** How many people do you have to persuade? An individual? An individual and her significant other? Several end-users and heads-of-department? Your ability to understand who is involved in the decision-making process allows you to provide copy and content that appropriately informs, reassures and persuades.

These factors apply differently depending on the nature of your sale. For example, home computers aren't terribly high-risk products anymore, but many find them unfathomable beasts, and they'll take their time acquiring information before deciding to buy one. Unless the one and only computer upon which their sole-proprietor business depends just got zapped by lightning and must be replaced by tomorrow noon. By the same token, you might take a while to consider the purchase of a water-heater if you are building a new house, but if your existing water heater goes up the spout, you need to replace it pronto. Almost no one would say a pencil is a considered purchase—knowledge of pencils isn't much of a problem and there's generally no risk associated—but if the purchase of a case of pencils or a single pencil from a new vendor requires several departments to sign off, consensus is an issue.

These factors can also be interdependent. The more you know about something, the more you may perceive the risks involved. Conversely, more knowledge may afford you the perception of less risk. The individual facing heart surgery will consider the relationship between knowledge and risk differently than will the heart surgeon. As will the individual investor staking his life earnings on options, compared to the options trader for whom these transactions are daily occurrences.



For each persona, we create a thumbnail graphic that represents the relationships of these factors once the site has satisfied the persona’s needs – a depiction of the persona’s end state of mind. We use a scale from 1 (low) to 5 (high) to help us plot the dimensions of sales complexity on a visual representation we call a Complexogram™. It is fundamentally a subjective process, but it offers us a reference and direction that we continue to investigate as we dig deeper into our understanding of the business as well as persona and scenario design.

Understanding all the elements that make up your unique persuasive process and understanding the needs of your audience will allow you to create a meaningful, persuasive correspondence between how you sell and how they buy.

## Personas

There is no average visitor. The path to mediocre and uninspiring conversion results is lined with project managers who imagined every visitor would think and behave in exactly the same way. People have varying strategies for accomplishing tasks, conducting research, managing their time and making decisions. The very concept of an average user makes it impossible to construct a persuasive process that will motivate a broad spectrum of individuals. The only thing average about most users is that they bail out in droves, happily abandoning businesses that do not speak to them, understand their needs or provide value.

To acknowledge and intentionally design for individual variation is not a direct-marketing exercise in audience segmentation; it’s a common-sense strategy for selling as face-to-face as you can get in a faceless medium.

*Persona Development in Persuasion Architecture’s  
Uncovery Application*

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A critical part of the uncover phase is identifying personas, archetypical fictional characters who represent your buying audience. We use these fully-imagined individuals to plan the click-through-experience models, or persuasion scenarios, each will have on the Web site—scenarios which we then articulate in the wireframe. This integrated and detailed level of planning allows multiple personas to access critical sales-process pages, as well as identifies how to address each persona's separate needs on that page.

We create personas—generally between three and seven—based on your knowledge of your audience, on actual visitor/customer information from documented experience (for example: customer service interactions, online behavior) and on research that describes the demographic, psychographic, and topologic information related to how people approach the buying decision process for your type of business.

- **Demographic.** What are the attributes of the audience?
- **Psychographic.** What are the psychological dimensions of the buying decision process?
- **Topologic.** How does the nature of your business shape the buying decision process, as well as the demographic and psychographic characteristics of your audience?

When we design personas for persuasive systems, we are primarily interested in understanding how they initiate relationships, how they gather information, how they approach the decision-making process, what language they use, and how they prefer to obtain agreement and closure. These are the principle factors that influence how we choose and connect prospects to content that helps them buy in a manner comfortable to them.

## *Narratives*

Your personas are your protagonists. A Persuasion Architect™'s job is to role-play every persona's experience. Our comprehensive understanding of this story allows us to begin constructing actual scenarios.

The narrative is filled with descriptions of how the protagonists begin their buying processes: to whom they talk, what they think and feel, what they encounter when they visit you and your competitors. It accounts for all possible interactions across all possible channels.

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Accounting for these elements allows you to construct a meaningful narrative.

- **Angle of Approach.** What causes the persona to realize they have a need/problem/opportunity? How do they describe that need/solution? (*I just bought a house and I need to mow my lawn*)
- **Alternative Options.** What options does the persona identify to try to fill that need/problem/opportunity? (*I could hire someone to mow my lawn; I could try to borrow my neighbor's lawn mower; I could buy a lawn mower; I could just let the weeds grow and call it "natural landscaping"*)
- **Driving Points.** How does the persona learn about the company/product as an option? This can include prior knowledge of the company/product (*I've used Toro lawnmowers before (driving point brand recognition?)*) or word of mouth (*I hear Toro mowers are good or My neighbor loves his Toro*). Then again, the persona may have no prior knowledge of the product/company (*This search result/consumer report/radio ad about Toro lawnmowers is interesting – I think I'll investigate*)
- **Stage of the Buying Process.** Where is the persona in the buying process? This can be early (knows nothing about the product or brand), middle (narrowing down choices and comparing options, may have some brand knowledge) or late (knows about the brand and exactly what he/she wants).
- **Buying Process/Needs.** What questions is the persona asking? What are the personas needs, motivations and objections? What are the competitive comparisons?
- **Selling Process/Presentation.** How you address the needs, motivations, objections and competitive comparisons? What does the company know that the customer does not know, but needs to? What questions should the persona be asking?
- **Conversion Goal.** What does the persona want to accomplish? What does the company want to accomplish?

Narratives confirm whether we've hit the mark in Uncovery. Through persona-specific narratives, we dramatize the facts and intelligence we've gathered in uncovery so we can predict the actions a persona will take and why they will take them. We identify pathways that align the

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buying process with the selling process. We begin to establish a structure of measurable conversion points – the definable places we can reference when analyzing whether our predictive models were correct.

In other words, we create plots that start with personas achieving their goals and end with businesses achieving their goals.

### *A Sample Narrative*

David C., a methodical buyer, is early in his buying process – he is going to propose to the woman he loves and wants to get her a diamond engagement ring. He knows he will need to visit a jeweler eventually, but before he speaks with a salesperson, he wants to understand everything he can about diamonds – from diamond quality to cut to sparkle to cost. David needs to make an educated choice so he can feel he has invested his money wisely. He will be meticulous in his research. But in the end, his deepest motivation is to get this wonderful woman to say, “Yes!”

David will want to learn about the “4 Cs” of diamond quality, the difference in diamond shapes, what to look for in diamond settings, how diamonds are certified, what makes a diamond beautiful. David will look for logical explanations – charts and figures that show how these various qualities are measured by gemologists. He will want assurances that his financial situation will not be minimized, and that the business understands and respects his desire to become an informed customer.

Because David prefers to think about his options and is not likely to make an impulsive decision, he may not achieve the business’s ultimate conversion goal of locating an authorized retailer who can show him these diamonds on his first visit. He is more likely, early in the process, to want information he can print out and examine at his leisure. Both the site and the brochure will need to help persuade him to reengage with the business later.

When David returns to the site, he may want to research further, or he may be ready to locate a store near him. The site will want to make its locator obvious, so David can get to it quickly.

### *Navigating the Uncovery Process*

A comprehensive uncovery will unfold as follows:

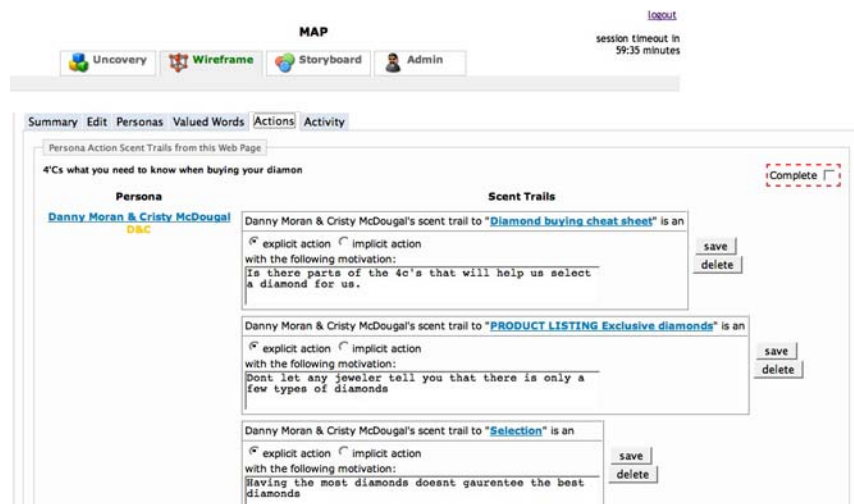
- 
- **Step 1.** We evaluate the particulars of your business model, your products, your customers, your competitive landscape and existing analytics for your current efforts.
  - **Step 2.** We begin to develop a conversion methodology by setting up baseline goals and objectives, documenting current metrics for baseline ‘apples to apples’ comparisons, and identifying Key Performance Indicators.
  - **Step 3.** We begin developing personas to better understand your customers as well as develop the strategy and tactics for achieving your business objectives. These personas will help shape more relevant messaging on your site and in your marketing channels. The success of this step depends greatly on acquiring as much information as possible about your customers, especially data that may reveal their motives for purchasing and not purchasing.
  - **Step 4.** The fourth and final step in uncovering is developing the precursor of a scenario: the narrative. In this step, we create stories that align the goal of each stage in the personas’ buying processes with a corresponding sales or business objective. The effect is twofold: we understand what we want the persona to do and can begin establishing trackable metrics to ensure predicted scenario behavior will eventually match actual scenario behaviors (see Optimization below). This allows us to plan for ROI.

## 2. Wireframing

### WIREFRAMING

- Identify the responsibility of each persuasion entity
- Identify every entry and exit point within the persuasion entity
- Establish persona scenarios (click-through paths)
- Identify calls-to-action
- Identify points-of-resolution
- Identify relevant keywords and key phrases for each page
- Suggest character of persuasive copy

Persuasion Architecture’s Wireframing defines the “what” of the creative process, providing the structure that will deliver the persuasive experience. This is not the form of wireframing most marketing or design people think of. “If you’ve ever seen a wireframe, it’s not too surprising there is a lot of friction between Information Architects (IA) and designers. Most wireframes are grayscale designed web pages. And then the IA says there is no design.”<sup>9</sup>



*Persuasion Architecture's Wireframe Actions Page*

The Persuasion Architecture wireframe is absolutely critical to persuading your customers; nothing is more important or relevant to planning for conversion. Wireframing is the stage where we concretely define our predictive model and create the detailed, customer-sensitive process that supports the customer's buying needs and the business's conversion objectives. Your wireframe is the culmination of the time spent on Uncovery (where you mapped the selling process with the buying process and developed personas). It is a detailed description of the strategy you will take to persuade each persona to navigate your site's carefully designed conversion scenarios.

### *Persuasive Momentum – The Bigger Picture of Conversion*

While the ultimate conversion goal of your persuasive system might be to generate a lead, get someone to register or subscribe or enter a contest or make a purchase, Persuasion Architecture acknowledges that every little step – each click – on the path to the goal is also a point of conversion. You want your Web site to persuade at the level of “micro-actions” as well as “macro-actions.”

*The essence of the Internet experience is how visitors click from one hyperlink to the next. How they feel about that experience is determined by whether each click fulfills their expectations and needs. Satisfaction with each click (a microaction) increases their confidence they'll get what they came for (the goal or macroaction).<sup>10</sup>*

The click, then, is the essence of your persuasive process. Every click represents a question your visitor is asking. It represents your visitor's

willingness to try to stay engaged with you. It represents a unique point of conversion. It represents continued persuasive momentum. If your visitors don't click, communication ceases and persuasive momentum evaporates.

No matter how complex the sale, every persuasive process unfolds click by click, one microaction conversion at a time. Persuasion Architecture is based on this broader understanding of conversion, so you can identify:

- **What actions?** You must look at every single action people will take on your site – first click, last click and all the clicks in between – as a measurable point of conversion in your persuasive process.
- **How will you persuade?** You aren't simply motivating the close. You are motivating a click and then another click. You must look to the specific copy and content that will persuade people to make conscious decisions to click on the hyperlinks that will take them deeper into your persuasive process.

Select the persona to path:

Josephine Bardot | Wedding Cake | open

**W.o.M. about Mme Gateau**

**Status:** 0% Complete  
**Overall Responsibility:**  
**Comments:**  
**Keywords:** (none)  
**Persona Description:**  
 MF Bride with SJ Mother, 23 years old planning her first marriage. French Canadian background planning a very traditional wedding.  
 Josephine was born the eldest of five children.

Persona Action Links from this Entity (explicit)		
Persona	Action Entity	Motivation
Josephine Bardot	<a href="#">Home Page</a>	

**Links To, By Entity**

Home Page

**Links From, By Entity**

**Persona**  
**Josephine Bardot**  
 Scenario Name:  
**Wedding Cake**  
 (Marriage)

**Goal:**  
 The bride will have provided a cake that is symbolic of the joy of her union that can be shared with those important to her.

Driving Point

✓ **W.o.M. about Mme Gateau** [5]

Funnel Point(s)  
 Home Page  
 Wedding Cakes

Waypoints	Points of Resolution
Design Your Cake [4]	Cakes Large and Small [4]
Taste A Madame [2]	Cakes in the Quebecois tradition [6]
Why a Mme Gateau cake? [1]	Cakes so Fresh.

From here the smallest path to the Conversion Point takes 0 steps:  
 → Taste A Madame  
 → Sign up for Tasting form  
 → Reserve Tasting Sign up

**Testimonials** [1]

Conversion Beacon(s)  
 Sign up for Tasting form  
 Conversion Point  
 Thanks for Tasting Sign up

*Persuasion Architecture's Wireframe Pathing Tool*

Persuasion Architecture's associated applications allow you to manage the complexity of your scenarios, ensuring that your personas are always within a click or two of a macro-action conversion. Persuasion Architecture also helps you guarantee that no click undermines your persuasive momentum by taking a persona to a dead end. The Persuasion Architecture Pathing application offers you the unique and

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valuable opportunity to experience the persuasive momentum of a site well before it is built.

### *Calls-to-Action, Points-of-Resolution, Resolving Doors*

Wireframing makes the idea of marrying your sales process to their buying decision processes concrete through the use of specific hyperlinks that create and sustain persuasive momentum. The type most people are familiar with are hyperlinks that deal with the sales process: calls-to-action. The one most sites don't use often enough – points-of-resolution – are links that help visitors in their own buying process.

**Calls-to-Action.** Each step in our sales process requires a visitor to take a specific action. Calls-to-action are the hyperlinks that move your visitor through your sales process – they give your visitors the opportunity to take the action you want them to take. These are the links that are critical to you, the ones you want your visitor to click on.

Calls-to-action are sales process links. We create them by pairing an imperative verb with an implied benefit:

- [Locate a retailer near you](#)
- [Subscribe to our newsletter](#)
- [Compare service plans](#)

**Points-of-Resolution.** Depending where they are in their buying decision process, your visitors will have specific questions they need answered before they can make a decision. You must resolve these questions before you can proceed with the sales process. The nature of the questions depends on the persona – not all personas will require the same information.

Points-of-resolution are the hyperlinks that answer these questions. These links, which have no hierarchical value, help resolve sticking points in the buying decision process. Your prospects are never required to click on a point-of-resolution to move through the sales process; they simply let visitors collect the information they need to feel confident making a decision.

Points-of-resolution are buying decision process links. We create them using nouns and place them where visitors are most likely to ask their questions:

- 
- “You might be surprised by all the industries that have discovered [ways to use grommets](#).”
  - “Grommets have improved greatly due to new [grommet technology](#).”

**Resolving Doors.** A point-of-resolution hyperlink takes your prospect to a resolution page, where the question is answered with relevant information. A resolution page can offer additional point-of-resolution hyperlinks – so a path through resolution pages can seem circular. Resolution pages frequently need to link to one another, hence “resolving” door. Think of those hotel lobby revolving doors.

Now think of the nightmare scenario where you’re stuck in one of those doors and can’t get out. You never lead your visitors into a dead end! You must either offer another answer or return your visitor to the sales process.

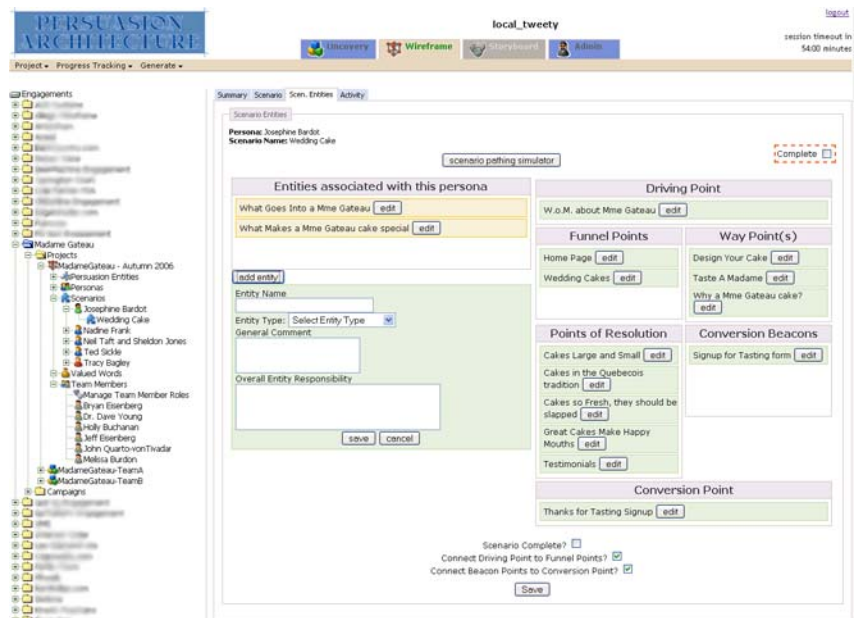
If at any time, on any resolution page, the prospect feels confident his buying process questions have been answered and is ready to exit, he’ll find carefully worded hyperlinks that lead him back into your sales process. These exit links, worded as a call-to-action, relate more to the sales process than the buying process – they introduce your specific solutions to the questions he is asking.

### *Scenarios and Their Components*

A scenario consists of persuasive components that lead a customer to participate in a conversion action. Some of these components will be linear; others will be non-linear. All must be customer-focused—based on how each customer approaches the decision to buy—rather than business-focused.

*And ...*

A scenario provides a structure for the meaningful measurement of customer activity so you can optimize performance.



Persuasion Architecture's Scenario Builder Application

When we explicitly plan a scenario to meet the needs of marketers, analysts and customers, we call it a “persuasion scenario.” It helps to understand the components that make up this beast.

- **Driving point.** This is the prospecting point, *outside the funnel*, where a scenario begins. It might be a search engine result, a pay-per-click ad, a print ad or any number of persuasion entities. It may also be the result of branding or a recommendation—things that don’t give us the benefit of direct evidence so we can understand their intentions. For our purposes in defining a scenario, however, the driving point is the place where the customer shows a level of interest in entering the scenario, even if we can’t always measure it.

The reason you must establish a driving point when describing a scenario is to understand the customer’s angle of approach. Knowing the angle of approach gives you better insight into the customer’s motivation.

Think of it as the for-sale sign (measurable) in front of a house or a phone call from a neighbor (not measurable)—the driving point is not the house itself, but the persuasive alert that the house is available.

- **Funnel points.** These are *entries to the conversion funnel*—a door (perhaps one of many) to the house that’s for sale. At this point, you, the business, are in a position to control and develop the dynamic of the persuasive process. A funnel point might be a landing page or

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main product category page, which essentially functions as a home page would to build persuasive momentum within the scenario itself. For a scenario to be measurable we must be able to identify the funnel point.

In our house analogy, think of the funnel point as making contact with the person selling the home.

- **Points of resolution.** These are your opportunities to provide the information customers may need to answer questions associated with their individual buying processes. Each point of resolution must always connect to a waypoint or a conversion beacon (see below) to ensure the customer never misses an opportunity to convert.

Think of points of resolution as questions a potential house buyer would ask about neighbors, schools or local shopping opportunities.

- **Waypoints.** These are “persuasive touch points”—points of interactivity—that are integral to the seller’s conversion goals, but critical to the needs of a particular customer. Waypoints support the sales process and the conversion goal.

For example, a Methodical, price-conscious homebuyer would wonder about costs, so a waypoint might be a document that answered questions about taxes and maintenance costs for the house.

Points of resolution and waypoints are persuasive components that support the non-linear qualities of the online experience. The order in which a customer hits these points and the actual number of points she interacts with is dynamic. In other words, both allow her to interact with you in a way that feels comfortable to her.

In all this, however, there is a danger in mistaking movement as forward momentum. When we are developing scenarios, we have to be careful not simply to move customers around the information; we must always be trying to move them forward toward their goal.

- **Conversion beacon.** A conversion beacon signals the first (or next) step in a linear process through which a customer must pass to reach the conversion point. Points of resolution and waypoints lead a customer to the conversion beacon, the place where the customer demonstrates the intention to convert.

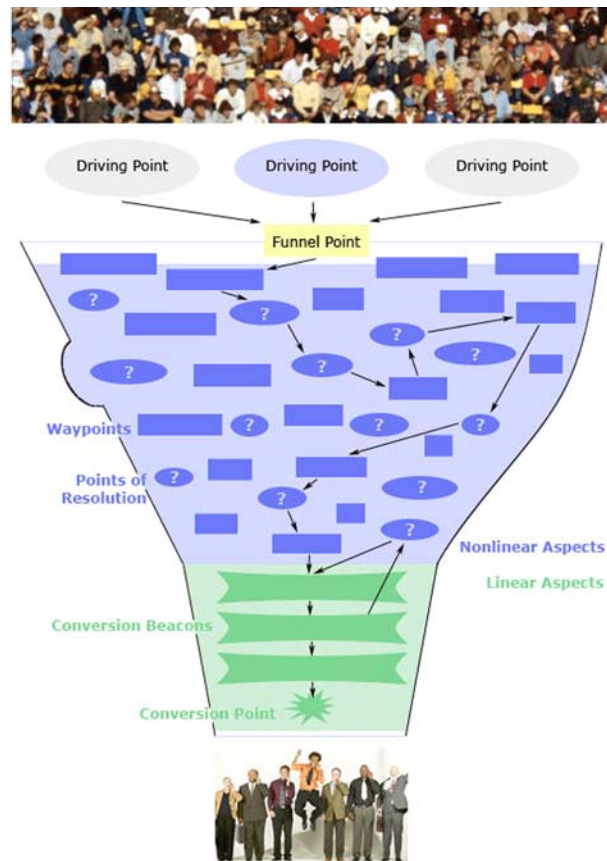
To persuade customers to make an offer on the home, points of reso-

lution and waypoints would build value for the home; the preparation of an offer would constitute the first conversion beacon. Each step in completing the offer process constitutes another conversion beacon—and the customer must complete each step in order.

In a store, you may enter the conversion beacon when you go to stand at the checkout line, even though you have yet to complete the purchase. Checkout processes for online retail Web sites usually include several conversion beacons.

- **Conversion point.** This is the point where we know with absolute certainty that a customer has successfully completed a persuasion scenario. The conversion point is the entity that gets delivered so that both the customer and the business know conversion has taken place. This entity is usually some form of confirmation.

When the offer for the home is conveyed to the seller, one scenario is now complete (although there are additional scenarios required before the macro-conversion goal of purchasing the home is complete).



*Schematic of a Scenario*

Each component of a persuasion scenario is designed with a customer focus that acknowledges the differing needs of each customer segment, depending on where each is in the buying decision process, and provides persuasive momentum. Into that structure, the scenario incorporates the sales process of the business in a way that benefits customers without undermining their buying decision process. This explicit planning provides exceptional support for the analytic expert's goal of measuring so marketers and sales people can, in turn, optimize.

**Linear aspects.** The analytics expert describes the success of the linear aspect of a scenario. Linear aspects typically occur at the beginning or at the end of a conversion process.

At the beginning, they could look like this:

Search engine result (the driving point) to  
landing page (the funnel point)

or

Banner ad (driving point) to landing page (funnel point)

or

A flier (driving point) to a store (funnel point)

And at the end:

Shopping Cart (the conversion beacon) to Complete Checkout (conversion point)

or

Form Completion (the conversion beacon) to  
Confirmation (conversion point)

or

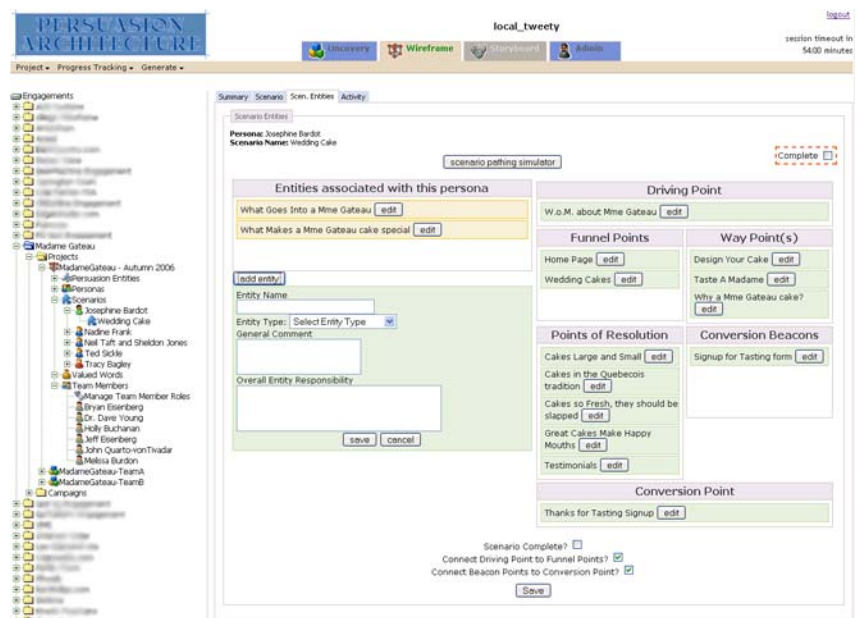
Taking the product to the checkout counter (conversion beacon) to  
receiving a purchase receipt (conversion point)

Linear aspects of a scenario come into play when customers need to start a conversion process or complete a registration process or check-out process.

**Non-linear aspects.** Many times customers have questions that need to be resolved before they can buy. Answering these questions requires building non-linear qualities into the scenario—these are more difficult, but by no means impossible, to measure.

Customers define the non-linear aspects of a scenario as they navigate your persuasion entities. These scenarios can be explicitly planned or implicit. They do occur randomly even if they were not planned. In a non-linear scenario, you can measure the point at which the customer starts the scenario (the driving point) to the point at which they complete the intended scenario (conversion point), identifying whether or not the customer hits the key value waypoints.

In online persuasive systems, Web analytics can identify the click-through path within the non-linear points of resolution. This helps marketers determine whether they are providing the appropriate content to maintain persuasive momentum.



*Persuasion Architecture's Scenario Pathing Simulator*

### *A Sample Scenario: Gathering Information*

David C. is going to begin researching the diamond engagement ring for the woman he hopes to marry.

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In this scenario, the goal is to help change the angle of David's perception early in his buying process. You can measure the success of this micro-conversion scenario (the point of which is not necessarily an actual purchase) by looking at whether David accesses a store-locator tool, examining how he interacts with various points of resolution, determining how much time he spends with waypoints, and whether he downloads information documents.

The path of David's information-gathering scenario might look like this:

- David types "learning about diamonds" into a search engine. The search results constitute the driving point for David's scenario.
- David selects a link to a website for the Leo Diamond and arrives on a landing page with the heading "How do I choose a diamond?" This landing page is the funnel point for David's scenario.
- David learns that researching diamonds begins with understanding the "4 Cs," so he clicks on a link to the "4 Cs." This is a point of resolution in David's scenario.
- From a list of other factors David might want to consider in choosing a diamond, he clicks on a link to "diamond settings." This is another point of resolution in David's scenario.
- David learns that the setting helps showcase a diamond's brilliance, which is the essence of a diamond's beauty. He follows a link to the "beauty of a diamond." This is a waypoint in David's scenario.
- David feels there is a lot of information for him to consider, so he clicks on a link to receive a PDF brochure of this information by email. This is a conversion beacon in David's scenario.
- On the download page, David provides his email address in a form and clicks the submit link. This is another conversion beacon in David's scenario.
- After the request is processed, David is taken to a screen confirming the file has been sent to him. This is the conversion point for the scenario.

Given David's persona attributes, the "diamond settings" page of the website was a point of resolution for him – it helps him resolve his

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information-gathering questions, but is not primarily a sales process page in his persuasion scenario.

For another persona with different attributes, the “diamond settings” page is a waypoint – presented explicitly as a persuasive sales process page that is sensitive to the individual needs of this particular persona.

## *Creating the Wireframe*

In wireframing you deliberately “map” your sales process to each persona's buying process. Thus, every wireframed Web page contains the answers to those three questions essential to persuasion:

- Who needs to be persuaded to take action?
- What actions do they need to take to satisfy the objective?
- How do you most effectively persuade them to take action?

Wireframing identifies every entry point and exit point on each page. It answers questions that include: "What actions can be taken here?" "What is the user's state of experience as she enters this page and when she leaves it?" “What role does this page fulfill in advancing the pre-defined conversion path for this persona? ”

The wireframe focuses on the experiential flow of the site. We meticulously create the path each persona requires to accomplish his or her goals, considering every single click-through possibility in order to fully map the persona scenarios. These scenarios are defined structurally as decision trees in the wireframe.

In the wireframe, we specify the responsibility (objective) of each page and determine which personas will be most likely to visit which pages. There are no pictures, no graphic design, just bare bones text and hyperlinks. You can click the links and see where you go; you can get a feel for the process of the site and help generate useful feedback at a time when changes are easy.

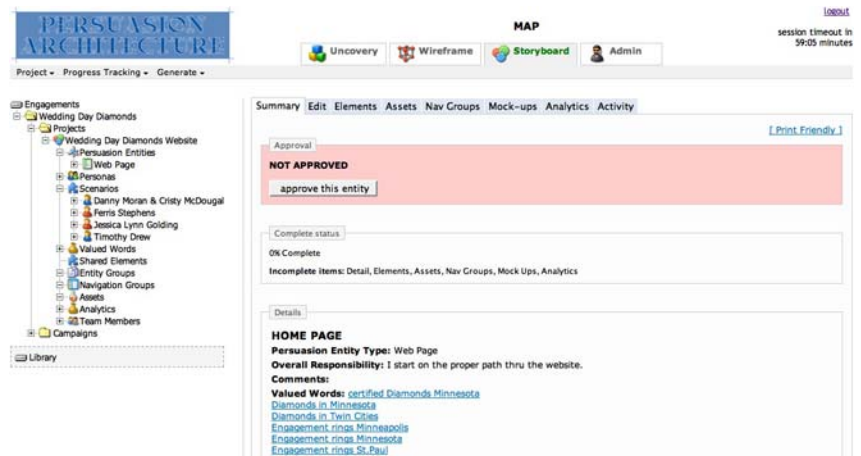
In addition to serving as your primary reference for developing persuasive copy and content, this detailed structure lays the foundation for establishing a comprehensive Web analytics strategy that allow you to track metrics and optimize your site based on those metrics. Persuasion Architecture’s Wireframe application also makes it possible for you to integrate multi-channel marketing (see Persuasion Architecture Beyond Your Web Site).

### 3. Storyboarding

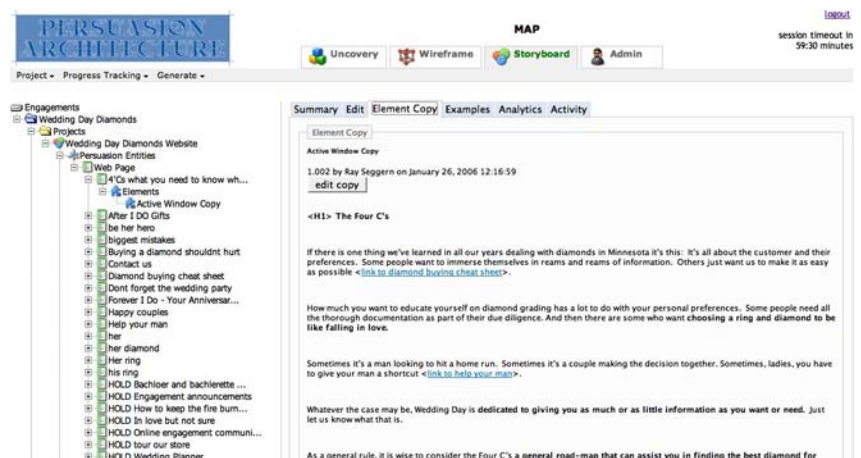
#### STORYBOARDING

- Conceptualize persuasive copy
- Identify all design elements
- Assign priorities to design elements
- Select images
- Develop layout first in grayscale, then in full color and finally in html

This developmental phase of Persuasion Architecture focuses on persuasive content, layout and design, “how” you will go about accomplishing the “what” you have meticulously created in the wireframe. You begin to flesh out your wireframe to ensure your Web site not only “speaks” persuasively, but has a persuasive atmosphere and an appropriate look and feel based on aesthetic and scientific principles of color theory and eyetracking. Rather than take the traditional approach of designing the look/feel and then fitting persuasion processes to this, we begin by defining the processes that are the backbone of your business imperative. With a thorough understanding and solid structure in place, we can then design the look/feel to support and enhance the persuasion process and conversion.



*Persuasion Architecture's Storyboard Summary Page*



*Persuasion Architecture's Storyboard Element Copy Page*

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Storyboarding unfolds in the following order:

- **Step 1.** Persuasive Copy. We identify everything that must be written for the persuasive system, incorporating everything we developed and conceptualized in the wireframe (incorporating the persuasive text, keywords and sales strategy.)
- **Step 2.** Layout/Storyboard. We develop a mockup of the visual aspects of the layout. Several elements will be considered: branding, navigation, page titles, header graphics, and footers, which include copyrights and privacy notices. After key elements are identified, we assign each element a priority so we know which elements need the most emphasis and where these elements belong.
- **Step 3.** Design in Grayscale. This is the first part of the phase in which we start designing for aesthetics. This mockup will be in grayscale so we can assess how the composition of the piece works without the emotional influence of color. If it looks good in black and white, you've probably got a design that can come alive with the judicious use of color.
- **Step 4.** Design with Color Application. This is where we focus on the mood and impact color can create. Better use of color means a better Web page or site. Your template will carry a color scheme from the landing page to the exit page, creating a cohesive look and feel for your site.
- **Step 5.** HTML Development. Once the color mockup is completed, we can now turn this image into an HTML document. Considerations addressed include download time, compatibility with multiple browsers, use of cascading style sheets for simplicity and congruence with Web standards, laying out of tables based on how search engines spider a Web site, and choosing fonts that can be read easily on a computer screen.

## 4. Prototyping

We borrow yet another design pattern from the field of Architecture: when architects prototype, they develop a full model of the final building that is accurate in virtually all aspects except scale. Developing this operational model of the application will allow you to see exactly how the system looks *and* functions. The goal is to evolve towards a prototype which is indistinguishable, from the user's standpoint, from the final Web site.

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Now is the time to make changes - it's still easy and cheap because nothing has been spent on programming. Look at things from different angles; solicit opinions from staff and end users. Iterate as often as it takes for the application to be right.

## 5. Development

The goal of Development is to deliver the finished, fully-functional product. Because planning, design iterations, and all the specifications have been finalized, your technology team or third-party developer can undertake programming without having to make decisions that could undermine your business objectives. Evolving technology will always shape the possibilities for your online persuasive entities, but it should never override or become a replacement for your business acumen.

Your careful planning ensures that developers can happily go about doing what they do best: making technology work for you. Additional benefits of detailed planning through Persuasion Architecture include cost control, a faster turn-around for the deliverable and a deliverable that is exactly what you expected.

## 6. Optimizing

You now have a finished product that offers a meaningful starting point for testing and measuring. Your ongoing optimization efforts will require monitoring your Web analytics to evaluate the effectiveness of the pre-determined scenarios that were defined during Wireframing. Testing and measuring in order to optimize is the only way you come full circle in Persuasion Architecture – the only way you can determine how closely you are meeting your objectives and how you can improve your results on every page that doesn't meet its responsibilities.

Applying Persuasion Architecture to web marketing makes everything measurable (although not all data yield useful information!). The result is a Six Sigma process that enables continuous improvement.

*You create the system your visitor must navigate. People don't cause defects, systems do.*

- W. EDWARDS DEMING, TOTAL QUALITY MANAGEMENT GURU

Anything that results in a lower level of customer satisfaction or a lost customer is a defect, a flaw in the sales process. When a visitor doesn't convert, your Web site has a service defect, and your processes don't deliver on your promise to customers or prospects. At least, that's how you'd look at things if you applied a Six Sigma discipline to your Web site.

Six Sigma is a measure of quality that strives for near-perfection. It's a disciplined, data-driven approach and methodology to eliminate defects in any process (driving toward six standard deviations between the mean and the nearest specification limit). It can be applied from manufacturing to transactional businesses, from products to services.

Six Sigma provides a framework to determine and prioritize what's mission-critical. Underlying the approach is a structure that uses measurements before, during, and after site development. Six Sigma works for any area where problems can impact customer perception of quality. Most failures in getting a customer to convert (to a sale, lead, subscription, registration, etc.) stem from perception of lack of value, trust, confidence, security, or relevance.

Six Sigma is an ideal, particularly in a service environment such as a Web site. The term literally means 3.4 or fewer errors per million opportunities (99.9997 percent accuracy). You're probably thinking, "That's not possible, or even applicable to conversion rates. I can't convert everyone."

In Persuasion Architecture, the goal is to predict a non-linear, but non-random, constellation of clicks. Six Sigma allows us to measure the deviation from our predictions.

Wireframing is the stage where we concretely define our predictive model and create the detailed, customer-sensitive process that supports the customer's buying needs and the business's conversion objectives. If we subsequently discover through analytic evaluation that our predictions were incorrect, we can first turn to our creative to determine if that truly supports the strategies we've defined. If that doesn't yield

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productive results, we then challenge the assumptions we built into the creative.

Don't get caught up in the number; it's not representative of the complete methodology. It's like a glass being half full or half empty. If we focus on an average 2 percent conversion rate, the best we'll get is incremental improvement.

To achieve outstanding results, look at things from the other side. What happened to the other 98 percent who left not yet ready to buy, intend to return, are still researching; or were disappointed or dissatisfied?

There are plenty of sites out there with conversion rates in the 10 to 40 percent range. Many more can convert 80 percent or more of their search engine traffic for specific key terms and optimized landing pages. Six Sigma is meant to drive sustained improvement in productivity, customer satisfaction and loyalty to reduce cost and increase revenue and profit.

# PERSUASION ARCHITECTURE BEYOND YOUR WEB SITE

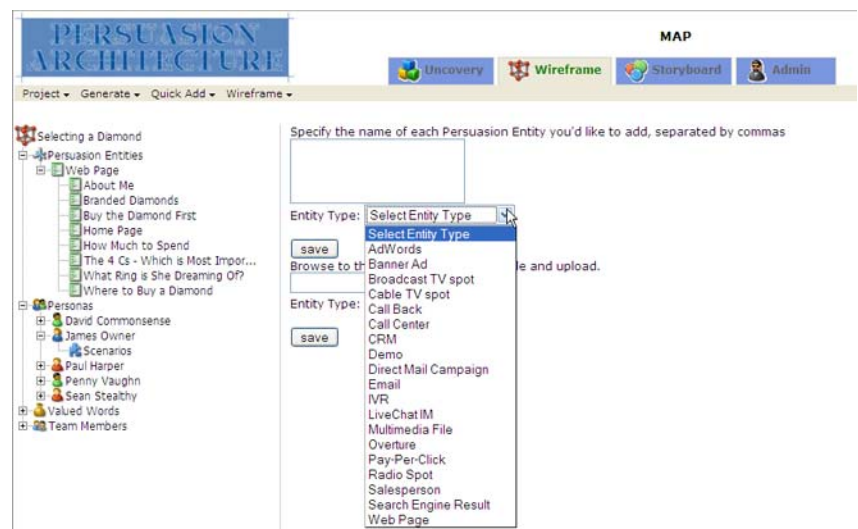
Managing the complexity of Web site development provided the inspiration for Persuasion Architecture, and it isn't a difficult stretch to understand the mechanics of this unique methodology when you think of a persuasive process in terms of hyperlink to hyperlink—click to click. But online initiatives rarely exist in a marketing vacuum.

The strength and beauty of Persuasion Architecture lies in its ability to manage a broader marketing picture in terms of cognitive process to cognitive process—the ability to persuade across venues in a multi-channel world. Any marketing activity that seeks to persuade, whether it is online or offline, will benefit from integration through Persuasion Architecture.

## Persuasion entities

Points of interactivity—touch points—occur throughout a persuasive system, and take many forms: A Web page, an e-mail, a snail-mail letter, a banner ad, an out-bound telemarketing call, a billboard, a television commercial, the packaging of a product, a sales conversation . . . whatever medium you choose to engage your audience.

How do you know which medium is the most effective for a particular message to a particular customer? By mapping the cognitive process of the buyer first, we can determine what persuasion entity will best satisfy the goal. The interactive map helps us to begin sorting these details.



Managing Persuasion Entities on Persuasion Architecture's Wireframing application

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Persuasion Architecture's Wireframing application provides for the management of Persuasion Entities and allows you to develop them in harmony with each other. These Entities include: Web pages, emails, banner ads, broadcast and cable television, radio, pay-per-click, telephone contact, CRM campaign, live chat, IVR, salesperson, search engine result, direct mail, Overture, AdWords, demonstration and others.

Each entity—whether a TV ad, banner ad, or Google AdWord—sets up a different expectation, will be seen in a different context and will likely trigger different responses. Each touch point with your audience provides an opportunity to persuade. A Persuasion Architect's job is to map the cognitive processes that are going to help customers reach the goal that is both theirs and ours. Persuasion Architecture can synthesize your marketing strategies based on the personas you have developed and help you maximize the potential for conversion every time one touch point hands over to the next.

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## PERSUASION ARCHITECTURE DELIVERS

*The world can be seen as only connections, nothing else... A piece of information is really only defined by what it's related to, and how it's related. There really is little else to meaning. The structure is everything.*

- TIM BERNERS-LEE, WEAVING THE WEB

Individuals who come to you are not looking for persuasion; most people don't mind being "sold," but ultimately, they are all looking for relevance. Your ability to persuade them and satisfy their needs depends entirely on your ability to provide relevance at every turn. When you satisfy your visitors' needs, you satisfy your business objectives: your conversion rates improve dramatically.

By making your prospects the driving force behind your persuasive system, Persuasion Architecture delivers the improved conversion rates that are the ultimate measure of your success. When you focus on Persuasion Architecture:

- You don't just get more sales -- you get more sales from your existing traffic. There's no need to increase your marketing expenses.
- Your customer acquisition cost goes down.
- Your customer retention rate goes up.
- Your customer lifetime value goes up.

The results of Persuasion Architecture are durable – they outlast the vicissitudes of temporary campaign strategies. Persuasion Architecture insures you will create a persuasive system with clearly defined objectives, a structure that improves conversion and ROI, and a fully accountability entity that allows you to test, measure and optimize so you can manage intelligently.

If businesses ranging from one-person shops to international corporations can apply the principles of Persuasion Architecture to achieve dramatic results, you can too. Our process is proven. It incorporates software applications developed specifically for creating persuasive systems. And it is accessible, even for those who possess no technological expertise.

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Are you ready to let Persuasion Architecture deliver for you?

If you would like to learn more about optimizing for conversion and planning for Persuasion Architecture, we encourage you to read *Call to Action: Secret Formulas to Improve Online Results* and *Waiting for Your Cat to Bark?: Persuading Customers When They Ignore Marketing*. Both books are authored by Bryan Eisenberg and Jeffrey Eisenberg, with Lisa T. Davis.

## A Quotation from a Client of Persuasion Architecture

We met Bryan and Jeffrey Eisenberg [years] ago. They were referred to us by a very creative and insightful marketing consultant who knew we were struggling with creating a meaningful brand presence for Leo Schachter Diamonds online. Eighty percent of all prospective diamond purchasers go online for information about products, their features and benefits, pricing, etc. Before we meet the Eisenbergs, Leo Schachter was not on the consumer's online "radar screen", demonstrated by marginal site traffic and meaningless visitor conversion rates.

In after just three months of their advice and guidance, we were able to architect and design a new brand site that now is regarded as the "poster child" for all online diamond brand sites in the industry. Their consumer-centric "persuasion architecture" process was the key in making the seemingly complex overhaul very simple. The project also cost less than we ever imagined. The experience was relatively simple and intuitive. In hindsight this makes sense since persuasion architecture has been founded on sound marketing and business "best practices". We started with the basics, setting objectives for the project that led to the development of multi-dimensional consumer personas we needed to influence. This led to building a mosaic of messages that we knew would be compelling to each persona in the purchase process. It is difficult to imagine that such a painless and logical approach would spawn the extraordinary results we continue to experience in qualified traffic and conversion.

This association has also resulted in overall enhancement of ROI for our overall marketing spend. The key metric? We directly attribute the "persuasion architecture" process, combined with Jeffrey and Bryan's project "navigation" expertise, for conversion rates that have risen from under 1% to over 50%! Future Now made it easy for us to de-mystify the "smoke and mirrors" promoted by the typical, generic creative,

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direct marketing and marketing communications resources that populate this space. Many people who know Future Now would refer to the company as being provocative. We do not. Rather, we see them as the voice in the cyber-wilderness that can finally make business sense of the role this difficult issue plays in any enterprise. If we were asked how we regard Future Now ... as a resource, we see them as a strategically relevant, creatively unexpected "secret weapon" in helping Leo Schachter maintain its #1 brand ranking in the evolving branded diamond category."

- JOHN MARCHESE, EXECUTIVE DIRECTOR, MARCHESE ASSOCIATES, FORMER CHAIRMAN & CEO, 141 WORLDWIDE (CURRENTLY A DIVISION OF WPP)

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## ENDNOTES

<sup>1</sup> MAP™ is a patent pending business process of Persuasion Architecture, Inc., a subsidiary of Future Now, Inc.

<sup>2</sup> “As Easy as 1, 2, 3 (4, 5).” Bryan Eisenberg. *ROI Marketing. ClickZ.* March 26, 2001. <http://www.clickz.com/experts/design/traffic/article.php/839301>.

<sup>3</sup> “The Buying Process Leads to a Decision to Buy.” *GrokDotCom.* October 15, 2003. <http://www.grokdotcom.com/buyingprocess.htm>.

<sup>4</sup> “In the Cause of Architecture.” Frank Lloyd Wright. *Architectural Record.* March, 1908. Reprinted in *Frank Lloyd Wright, Collected Writings.* vol 1. pp 87-88.

<sup>5</sup> Also Andrew Jackson Downing, Calvert Vaux, Ebenezer Howard.

<sup>6</sup> <http://www.fredericklawolmsted.com/Lifeframe.htm>.

<sup>7</sup> “Learning from traditional architects.” Lorraine Johnston. Swinburne University of Technology, School of Information Technology. Hawthorn, Australia.

<sup>8</sup> To learn more about retail anthropology and persuasion: *Why We Buy.* Paco Underhill. Touchstone Books, 2000.

<sup>9</sup> Christina Wodtke, Senior Design Manager, Yahoo! and author of *Information Architecture: Blueprints for the Web.*

<sup>10</sup> “The New Frontier: Complex Sales.” Bryan Eisenberg. *ROI Marketing. ClickZ.* January 30, 2004. <http://www.clickz.com/experts/crm/traffic/article.php/3305521>.

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## ABOUT FUTURE NOW, INC.

*Judge a man by his questions, rather than by his answers.”*

- VOLTAIRE

Driven by the question “Why do people do what they do?” the team at Future Now, Inc. focuses on helping our clients better understand their customers and converting that insight into profits.

Founded in 1998 by Bryan and Jeffrey Eisenberg, Future Now, Inc. is a New York City based consulting firm. Future Now, Inc. is largely recognized a leading voice for increasing online conversion rates, accountable multi-channel marketing and web analytics.

### Our Passion

Our company thrives on three core values.

- Curiosity - We never stop seeking better answers, seeking interesting perspectives, and generating practical new ideas.
- Integrity - We have a passion for uncovering what is true, real, and knowable even when it’s not the conclusion we hoped for.
- Loyalty - There are things more important than gain at the expense of compromised values and divisiveness.

### Behind Future Now, Inc.

Led by two time *New York Times*, *Business Week* and *Wall Street Journal* bestselling authors, Bryan and Jeffrey Eisenberg, our team is a tight-knit, colorful group of experts from a wide palette of disciplines: interactive media, human behavior, online strategy, business development, communications and technology, our team has decades of combined experience. What we all share is a passion for our company’s core values, and a camaraderie scarce in the business world.

With our patent-pending Persuasion Architecture methodology and proven conversion rate optimization services, our team helps clients define and surpass their goals—online and off.

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## Our Reputation & Track Record

We've built our reputation through helping clients improve online results. Our client list includes: Dell Computers, PriceWaterhouseCoopers, Overstock.com, NBC Universal, LogoWorks, Everbank, CardScan, Southern Company, CafePress.com, LowerMyBills, Agora Publishing, RADirect, Universal Orlando, WebEx, Allegis Group, Leo Schacter Diamonds, BuyTelCo, XGaming, Volvo Construction, Max-Effect, Mag Mall and Café Press.

Future Now, Inc.'s services include company-wide strategic consulting, campaign specific consulting, and ongoing optimization for long-term engagements. We also offer free and low-cost resources for the do-it-yourselfer, mid four-figure conversion assessments, low-to-mid five figure persuasion scenario assessments, low-to-mid six-figure Persuasion Architecture planning and architectures..

## Holistic Approach, Better Results

Future Now, Inc. views persuasion and conversion from a global perspective. While other firms claim the ability to increase conversion, it is usually because they have highly-specialized expertise that at best improve your overall sales efforts incrementally. Our philosophy is quite different. Rather than focusing solely on the technical aspects of how your customers buy, we are able to dramatically improve overall conversion rates by adjusting your entire sales process through the eyes of your customers. We believe technology should follow people, not the other way around.

Like you, your customers are three-dimensional, living human beings. Links manifest their choices; clicks evidence their decisions. We help you sell by creating persuasive systems that help your visitors choose to buy.

There are plenty of talented interactive marketing professionals in our industry; in fact, we'll gladly recommend them to you if we're not a good match. Still, when choosing the right firm to meet your online goals, it's important to know where a narrow focus can blur the big picture:

- Design firms won't tell you that anything beyond "professional" design won't increase profits.

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- Usability firms won't tell you that usability is like dial-tone; you only miss it when it's not there.
  - Analytics and Testing firms won't tell you that traditional A/B and multivariate tests don't help with complex scenarios that were unplanned to begin with.
  - Search Engine Marketing firms and Online Agencies won't tell you how to convert the traffic they drive.
  - User Experience firms won't tell you that experience does not equal persuasion, nor that effective persuasion implicitly leads to effective usability.

## Our History

Future Now, Inc. began in 1998 as a kitchen table operation in Brooklyn, New York. At the time the Internet world was obsessed with “eyeballs” and the Eisenbergs were disgusted at the sheer volume of capital being thrown at Internet sites without regard to return. Shortly thereafter the Dot Com boom became the Dot Bomb.

During those tight years the small and committed Future Now, Inc. team was notching up success after success, teaching those who would listen, refining our process, and together with John Quarto-vonTivadar doing the hard work of developing Persuasion Architecture. By 2001 the company had celebrated a move into a dedicated office in a basement below a residence on 24th Street.

Today Future Now, Inc. publications enjoy a readership of over 100,000. Our team and organization have grown, our client list has expanded, and we have since moved into a spacious office in Brooklyn’s historic Red Hook district.

## Persuading Your Visitors to Take Action

Persuasion Architecture combines the best of these disciplines into one comprehensive process that includes:

- Relentless devotion to ROI
- Psychology & neuroscience
- Marketing & sales strategy
- Linguistics & search engine principles

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- Graphic design & aesthetics
  - Usability & heuristic analysis
  - Data mining & analysis
  - Persuasive copywriting & editing
  - Testing & optimization methodologies
  - Training backed by our experts' proven track-record

Future Now, Inc. first described the Persuasion Architecture methodology of converting online traffic in 1998; publishing over 200 columns, 200 articles and 3 books on the subject. Marketers worldwide have used our methods to boost their site conversion rates, and we have trained dozens of clients and licensees to optimize their websites on their own.

## What Future Now, Inc. Can Do for You

We invite you to learn more about our services as they relate to:

- Completing purchases - lowering your abandonment rates and increasing sales
- Lead generation - turning more site visitors into business leads
- Driving customers across channels - enhancing your brand affinity and increasing value

If you would like help evaluating which options might be best for you, please contact us or call (877) 643-7244. We do not have salespeople, so there will never be a "sales pitch."

## Our Professional Memberships

Professional organization memberships include:

- Founders and Chairman of the Web Analytics Association
- Associate members of Shop.org
- Charter member of the WebTrends Insight Network
- Members of the Word of Mouth Marketing Association
- Members of the Advertising Research Federation
- Members of the Asilomar Institute for Information Architecture
- Members of the Usability Professionals Association
- Members of the American Society for Quality