Turning visitors into customers

A guide to winning new customers from your website, with GoSquared.

GoSquared

The first step in your conversion strategy

Stop! Before you automate, listen

If you're new to GoSquared or conversion tools in general, it's tempting to start right away by building workflows and automations.

However, if you're building automations without data or an understanding of who your site's visitors are, you're really just relying on assumptions and hoping they work. The best way to start building your website conversion strategy is to genuinely learn about your visitors by getting this data directly from them.

At GoSquared we provide you with a suite of tools to that allow you to both validate your assumptions and learn about your visitors. The easiest way to find out information about your users – believe it or not – is simply to ask them.

Gather your materials

This book is packed with helpful advice, ideas, and resources to help you start turning more of your website visitors into customers today. To make the most of the book, you'll need the following:

- **A website**. You will need access to the source code to use GoSquared. Get a developer to help if you're not sure what to do.
- **A GoSquared account**. You can start a free trial right now at gosquared.com/join/ebook
- **GoSquared Assistant enabled** on your website.

Key tips for communicating effectively with live chat

With GoSquared Prompts, you'll have an opportunity to actually engage with your visitors so here's our top tips for how to best communicate using live chat.

Keep your messages short

Aim for your chat messages to be no more than 1 or 2 sentences long. This format is better suited to live chat and how your prospect will be used to communicating with similar tools.

Adopt an informal tone

Keep the tone relatively informal (as much as suits your company or brand) – people are expecting and hoping to talk with a real person.

Be inquisitive

Ask questions! This is the best opportunity to listen and learn about your visitors.

Be human

Keep in mind that if you are sending multiple messages without a response.

the conversation and dialogue will start to seem unnatural. This is your first opportunity to win over a new customer — treat every conversation like they're your next best customer.

Be patient

Give your visitors the chance to think and reply to your messages without nudging them too often.

Set expectations

We always recommend time to reply should be ASAP but if that's not possible you can use the **Time To Reply** feature to set expectations for your visitors.

How to set up Prompts

Use Assistant to increase conversion

GoSquared Assistant is a small widget you enable on your website. Assistant enables you to communicate with your visitors and customers via live chat, ask for feedback, and capture leads in a highly-targeted and effective, yet effortless way.

Prompts, one of the features of GoSquared Assistant, are automated messages you can set to show to visitors at a specific time, based on a huge range of options. Prompts can be extremely effective, and can help with the very first part of your conversion strategy.

Prompts are set up on a per-project basis, so make sure you've selected the correct project first – then just head to **Automation > Prompts** in the sidebar.

When adding a new Prompt, you'll be presented with a list of options that break down into three categories:

1. **Who** should see the Prompt?
2. **When** should they see it?
3. **What** should the Prompt say or do?

Turning a Prompt on

When you're happy with the settings, hit the "**Save and Publish**" button to turn the Prompt on. This will start showing the Prompt to new visitors immediately.

Turning a Prompt off

You can turn a Prompt off at any time by switching the toggle off. This will stop showing the Prompt to your visitors.

Deleting a Prompt

Just click on the Prompt you want to delete and hit the “**Delete**” button. Deleting a prompt cannot be undone.

Testing your Prompts

The easiest way to check if a Prompt is working is to open your site in a new browser window.

Note: Use a private browsing window in your browser of choice to ensure you appear to GoSquared as a new visitor. For example, Chrome’s “Incognito” mode, Safari’s “Private Browsing” mode, or Edge’s “InPrivate” mode.

If you still can't see your Prompt, check that you haven't blocked your IP address. Blocking your IP address in GoSquared stops your own site visits polluting your Analytics data, but also stops GoSquared Assistant and Prompts from showing. You can view your blocking settings in **Settings > Current Project > Blocked**.

Who should see the Prompt

A visitor must match **all** of the rules that you set up in the “**Who**” section. Prompts can be shown to visitors who:

- **View a specific page** – you can add multiple pages by adding each one on a new line.
- Have been **referred from a specific site** – you can list multiple referrers by adding each one on a new line.
- Are in (or are not in) a **specific country**.
- Have **viewed a certain number of pages** during their current session.
- Have been **online for a certain amount of time** during their current session.

When the Prompt should show

A Prompt can trigger when any of these conditions are met:

- **Time on page** – when the visitor has been viewing the current page for a certain amount of time.
- **Exit intent** – when the visitor looks like they're about to leave the page.
- **Scroll depth** – how far down the page the visitor has scrolled.
- **Only during your open office hours** – when one of your team is available to reply.

What the Prompt should say and do

This is where you give the Prompt a purpose.

Are you trying to start more conversations? Or are you looking to encourage your visitors to take action on something?

You can customise the following options:

- **Sender** – who the Prompt is sent from. Either a team member or your company.
- **Style** – how the Prompt is presented. Either as an “Invitation to chat” or a “Call to Action”.
- **Message** – what the Prompt should say. You can include text, emojis, links, and buttons (if you choose the Call to Action style).

“Invitation to Chat” Style – encourage a response

The Prompt is displayed with a reply box underneath it.

You can also choose how much of the message should be shown, either a short Teaser version, or the Full message version. By default the 'Teaser' option is selected. This will truncate long messages so that the visitor has to click on the Prompt to open the Assistant to read the full message.

“Call to Action” Style – adding a button

This allows you to add a button with a link to the message. It also hides the reply box so a visitor's attention is directed to the action button. These prompts default to Full message display option so that your action button is always visible.

Set your name and photo from **Settings > Your Account > Personal**

Set the company name and avatar from **Settings > Current Project > Assistant**

Chat Prompt behaviour

Chat Prompts will only be shown to new visitors that have never previously sent you a message.

A visitor will only see a maximum of one Prompt per page. This means that if you have more than one prompt configured to show on the same page, only the first matching Prompt will be shown.

If a visitor dismisses a specific Prompt, they will never be shown that specific Prompt again.

If a visitor replies to a Prompt, they will not be shown any future Prompts because you have already opened a direct line of communication with them.

Note: Chat Prompts will not show up if the visitor is using an ad blocker on their browser.

Advanced URL matching

When choosing who to show a Prompt to, you can use basic URL pattern matching to specify which pages to show them on.

Wildcards

Quickly set up a Prompt to show on lots of pages.

Your domain

https://mywebsite.com/

URL match /*

The * is called a wildcard. It means match 'anything'after this point. This example will show the prompt on every page of your site.

---

https://mywebsite.com/plans/enterprise
https://mywebsite.com/plans/pro
https://mywebsite.com/plans/free

URL match /plans/*

Here the * wildcard has been used to show the prompt on any of the /plans pages.

Prompts on a subdomain

Showing a prompt on just a specific subdomain.

subdomain Your domain

https://app.mywebsite.com/

URL match *//app.mywebsite.com/*

To show a prompt on a subdomain, you need to include the subdomain in the match. This example will show the chat prompt only on the app. subdomain. It's also using a * at the start of the match to say 'match both the http and https' version of the site.

Capture more than just an email address

While you're talking to your prospects, it also makes sense to capture their details so you can start to build up a list of contacts. Live Chat is best used for short-duration conversations, so that's where you'll collect your qualitative data.

However, there will also be analytic data available that can help to tell you more about your customer. Think about how much this data can inform your conversations.

What other information can help with sales conversations?

For example, did they arrive from a Quora question related to your industry? This can give a lot of context to the problem they are looking to solve.

How many times have they visited your website in the past week? This can tell you a lot about their intent and where they are at in their purchase journey.

GoSquared Lead Capture gives you the ability to combine this data alongside other qualitative information and enables you to build a really robust profile of who your leads and customers are.

Map your customer journeys

“Context affects our decisions to a far greater degree than we realise.”

– Rory Sutherland, British advertising executive

Now that you’ve built profiles of your visitors and have captured their contact details, the next step is to start to identify groups among them that share common behaviours so you can start to put them on a lead nurturing journey.

Why segment? Why not just put everyone on the same lead journey?

You want your drip campaign to be delivered in the right context.

What do we mean by context? It’s about taking into account their current circumstances when you deliver a message to them. So let’s look at three circumstances:

- A visitor has discovered you through a piece of content you’ve been marketing, it’s resonated with they’ve signed up to your newsletter because they want more. **Educate** them on who you are here.
- A visitor has viewed your details about your product(s). **Position** your product here.
- A visitor has viewed your pricing details. Focus on **conversion** here.

By segmenting your leads into different categories you can deliver messages with far greater context to your prospects.

How to segment your leads

Simply put, a Smart Group is a set of filters that you can save to quickly reference those users in the future. You can use Smart Groups to segment your users and trigger automation flows.

We say they're 'Smart' because they update in real time. When a new user matches the filter, they automatically get added to the group (entering the group). When existing users un-match, they will be removed from the group (exiting).

The real time entering and exiting is useful for setting up automation triggers. For example, when somebody enter's the 'New Signups' group, send them a welcome email.

Create a new Smart Group

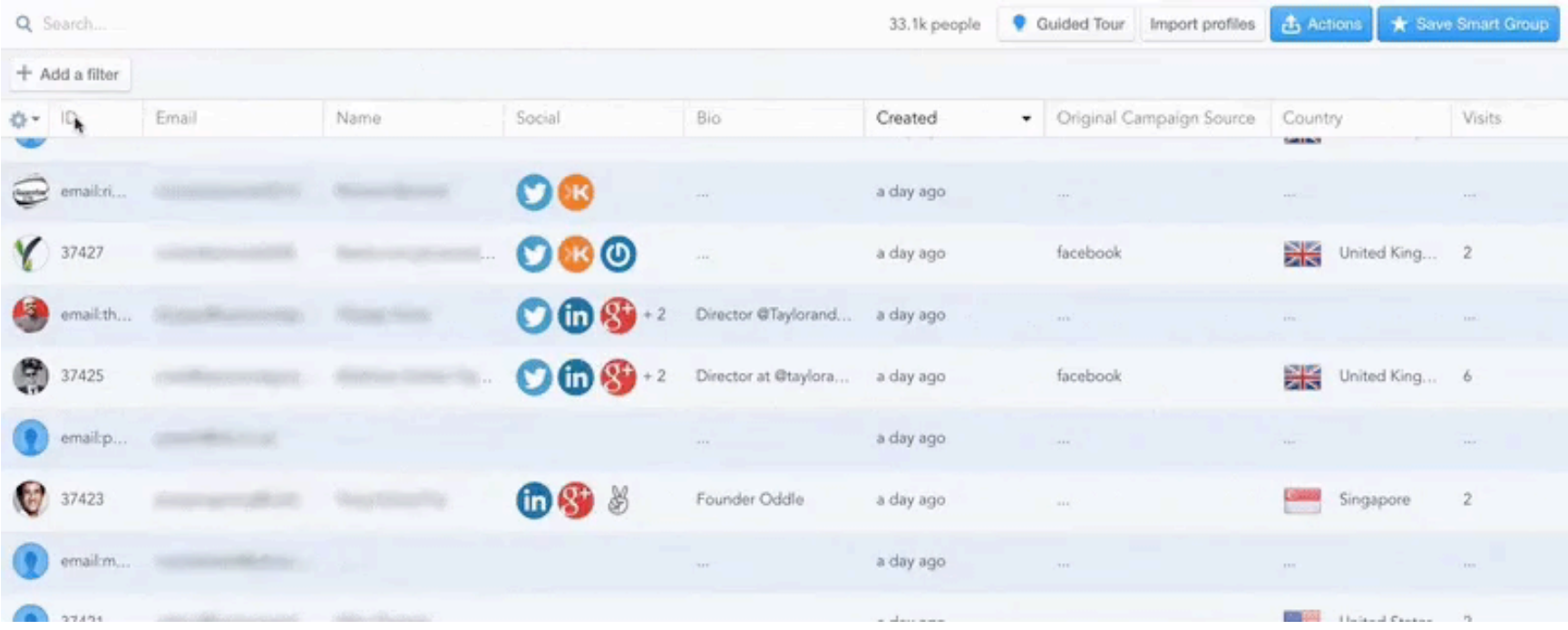
In GoSquared People, you'll see a group called **Users**, This is the default group and shows a complete list of all the profiles/contacts/leads that you have stored in GoSquared. This includes anonymous visitors that you've had a Live Chat conversation with.

In your Users group, just start adding filters.When you're happy with your filters, click "**Save Smart Group**" in the top right hand corner and give it a name. Anybody on your team can create, delete and modify Smart Groups.

Saved Smart Groups will appear in the sidebar on the left.

Adding filters

To start filtering, go to "**People**" in the sidebar on the left and click the "**+ Add a filter**" button. The list of users that match the filter will update as you adjust it.



You can filter based on any property or event that you track. By default GoSquared Analytics will track lots of properties for you (such as number of visits, location etc) that will already be available for filtering.

If you're tracking custom properties, the filtering options available depend on the type of data each property is.

Combine filters to further refine your segmentation

AND filters

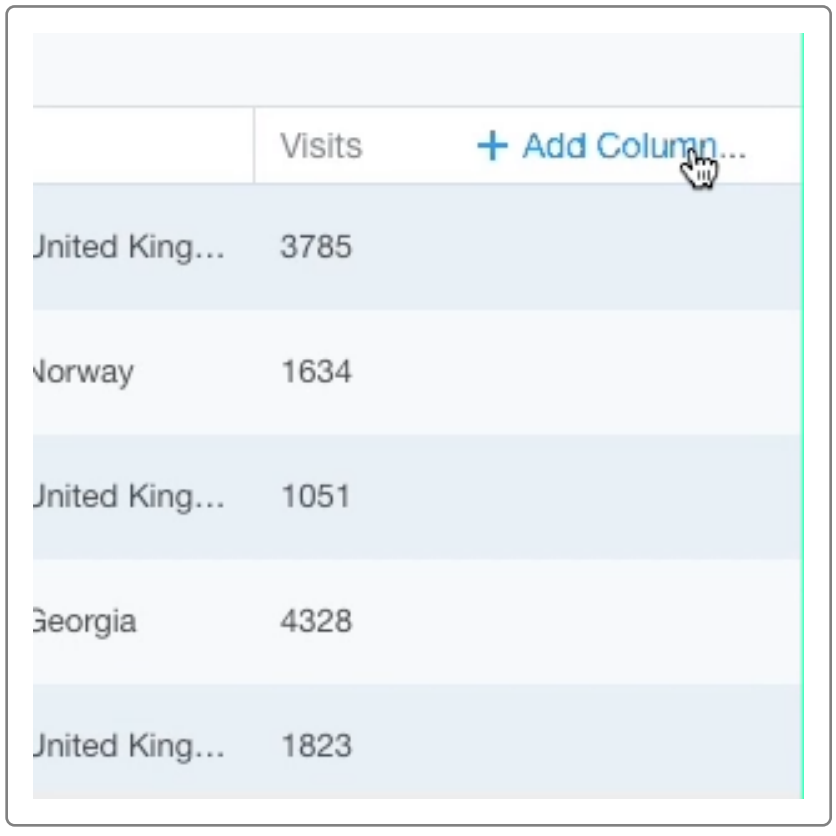
AND filters will only find users that match **all** of the filter conditions.

OR filters

OR filters will find users that match **any** of the filter conditions.

Add or remove columns from the layout

When you add a filter, the column for that property/event will be added automatically. You can selectively add and remove columns using the settings cog on the left, or the + button on the right hand side.



Rearrange the columns in your layout

Drag and drop columns to change the arrangement. You can also adjust the width of a column if it is too wide or too narrow, and choose which columns are visible.

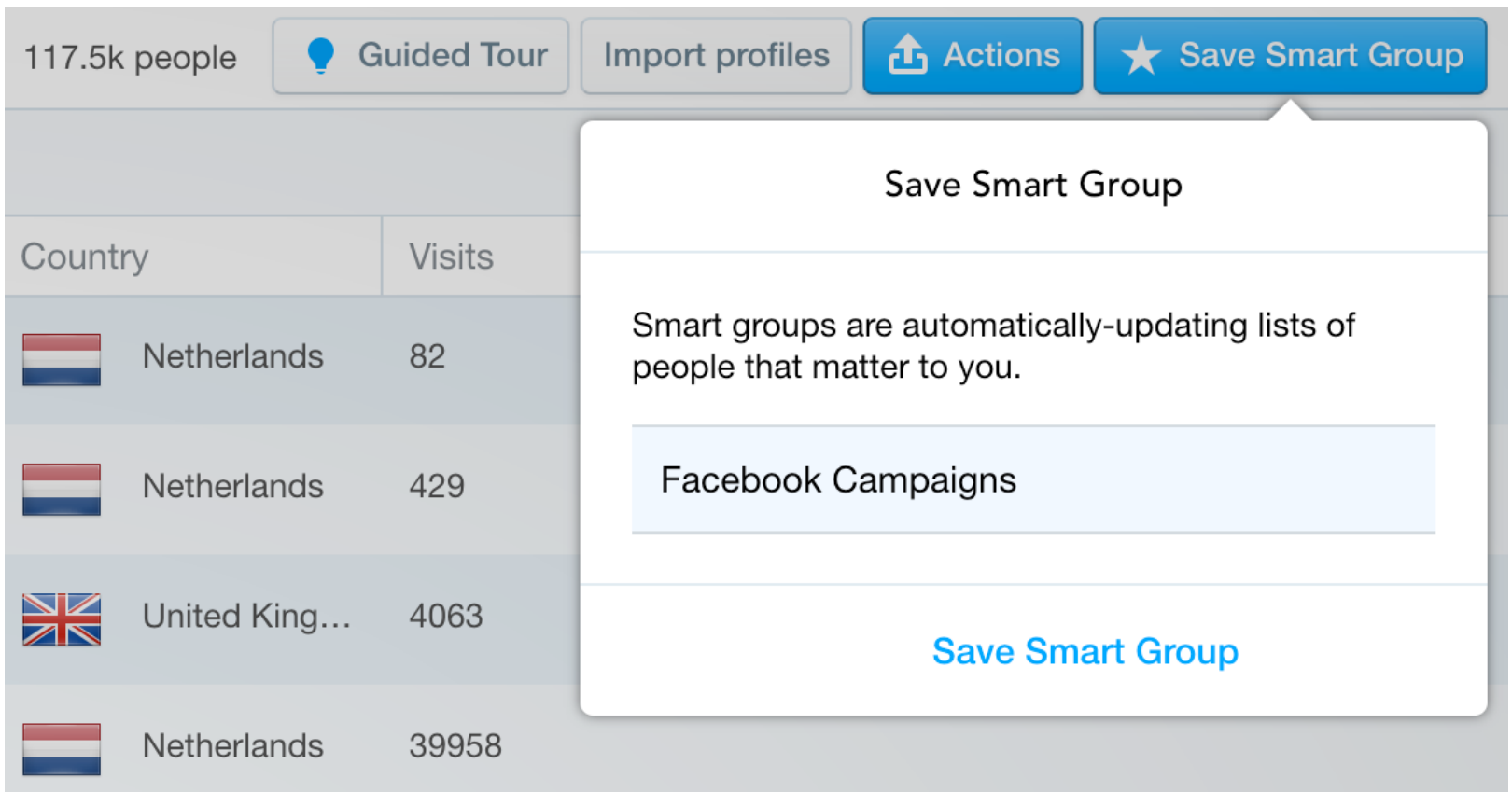
Sort a group of users by any property or event

You can sort a list of users by clicking on the head of column that you want to sort by. Depending on the data type of the column you can sort by:

- **Number** – click to switch between ascending and descending order.
- **Text** – click to switch between alphabetical or reverse alphabetical order.
- **Date/timestamp** – click to switch between chronological or reverse chronological order.

Save your Smart Group

Once you've added filters and tweaked your columns, just hit the “**Save Smart Group**” button in the top right hand corner. Give it a name and hit “**Save**”.



Saved Smart Groups will appear in the sidebar with the number of users currently in the group next to it. It can sometimes take a few moments for the number of users to update when you first save a Smart Group.

Actions and Automation

The **Actions** button in the top right hand corner will reveal a list of actions you can take on the users in this group. A lot of the options will only become available after you've saved the group.

This could be as simple as exporting the list to use in another application, or triggering an automation flow in a 3rd party app using our integrations.

Guide to email notifications.

Guide to exporting profiles.

Triggering automation in real-time

The important thing about delivering messages in context is that it's time sensitive.

If you wait too long, circumstances change and your message become less relevant.

That's why you'll want to deliver that message the moment that a visitor displays that behaviour.

At GoSquared, we call the segments you build in People **"Smart Groups"**. That's because your segments update as soon as a new visitor matches the criteria you've set.

For example, if you have a Smart Group set up for when a user signs up to your newsletter, as soon as a user signs up, they'll automatically be added to the segment.

It's this moment, when a user enters the group, that GoSquared can trigger your automation workflow. Triggering automation this way ensures you're delivering that message to the right visitor, at the right time.

One of the best ways to use Smart Group automation is let it be the brain of your email campaigns. Next, we'll show you to set up some example campaigns.

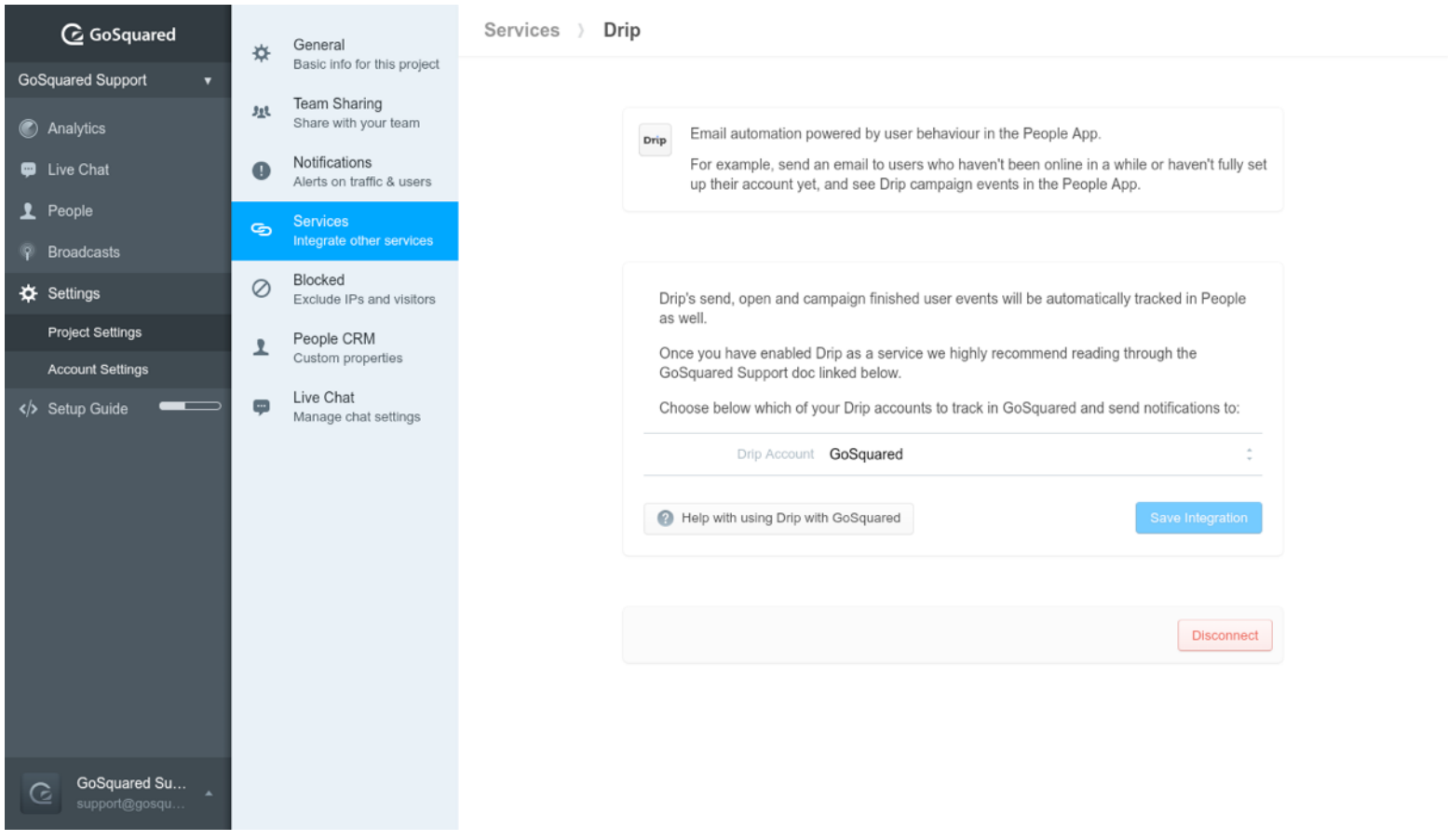
Driving email automation with the Drip integration

The GoSquared Drip integration enables you to send smart, targeted email drip campaigns based on the data you have in GoSquared People. Using GoSquared and Drip you can send more personal, well-timed email drip campaigns to your leads, users and customers.

Drip's “send”, “subscribed”, “open” and other user events will be automatically tracked in GoSquared People as well, so you can see the full story for each profile in GoSquared.

Enable the Drip integration

Head to **Settings > Current Project > Services** and select the “Drip” integration. You will then be asked to authorise your Drip account with GoSquared, as shown below.



You will then be asked which Drip account you would like to sync with your GoSquared project. If you would like to add multiple Drip accounts, simply go through the set up process again.

Automate an email campaign using Smart Groups and Drip

Let’s take the example you want to email people who have become disengaged with your business and start an drip email course with tips on how to make the most out your service.

1. Create a Smart Group

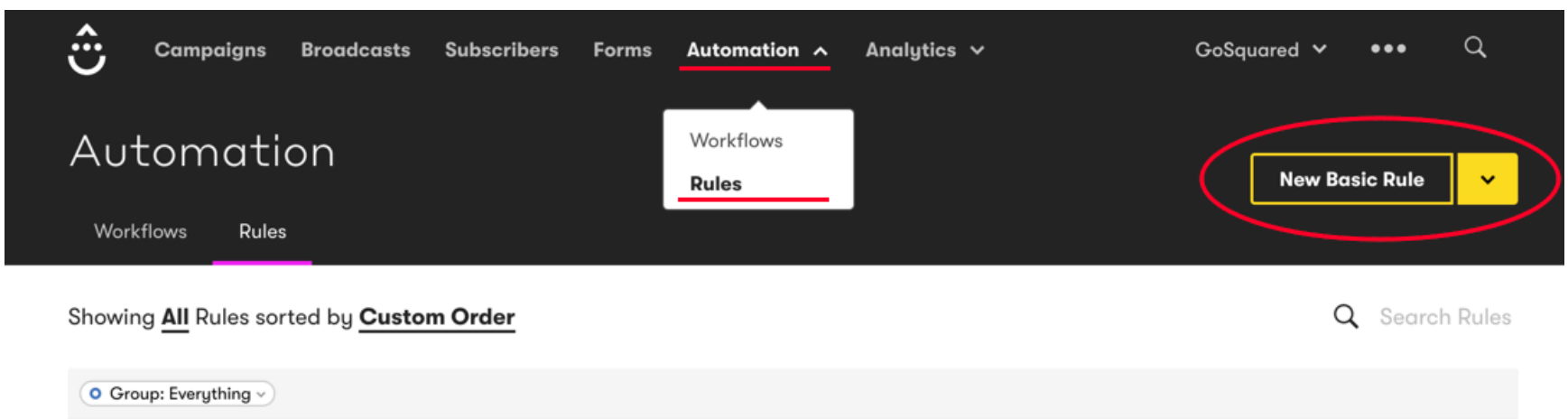
First you will need to create a Smart Group that defines who, and when, somebody should be sent an email.

In this example we want to create a Smart Group that has just one filter: Created within the last 14 days. We will call this Smart Group ‘New Users’.

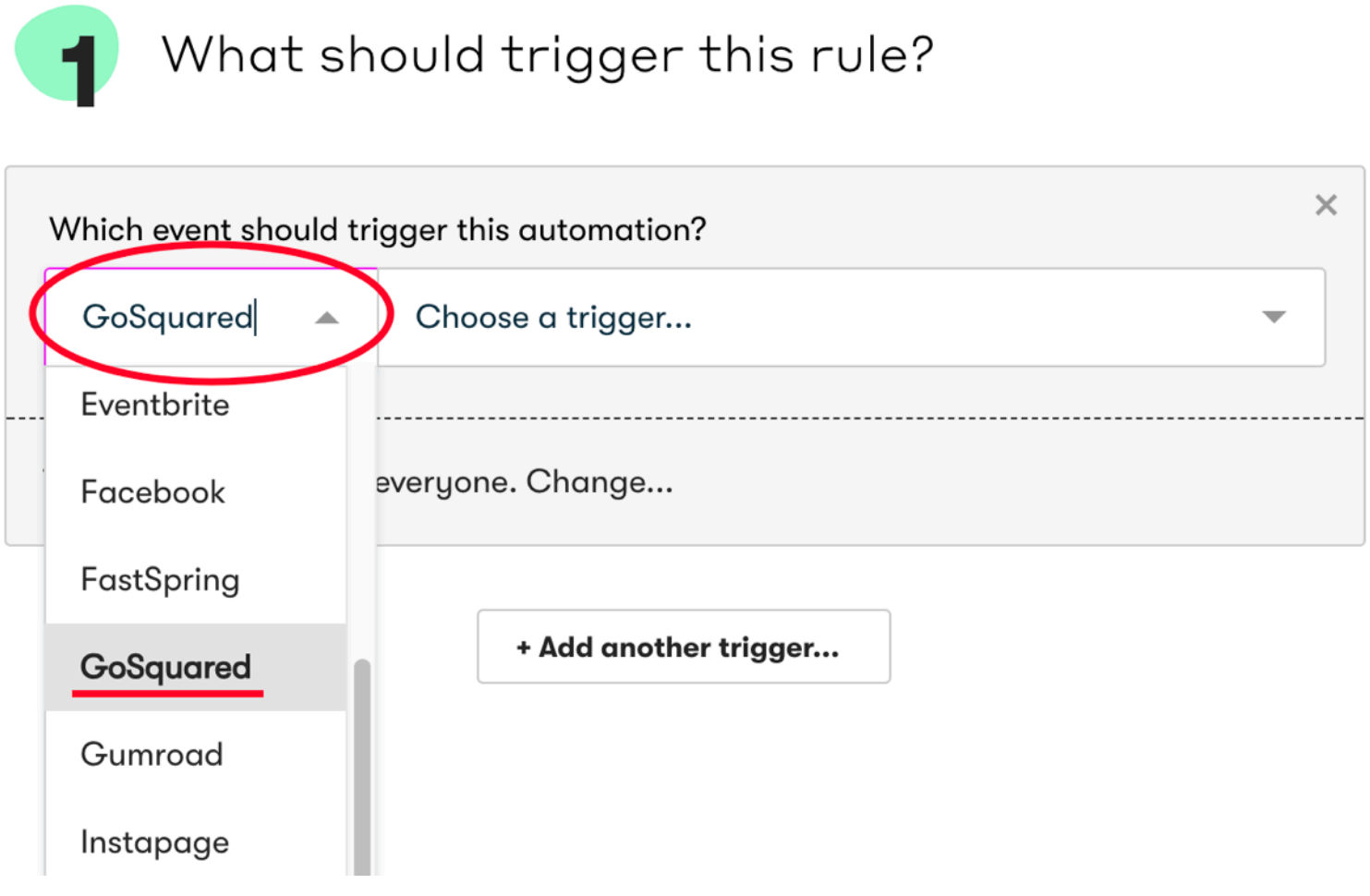
When a new profile gets tracked in People CRM, they will automatically enter this group because their profile's Created at timestamp will be within the last 14 days. This group now allows us to target new users.

2. Building Marketing Automation Rules

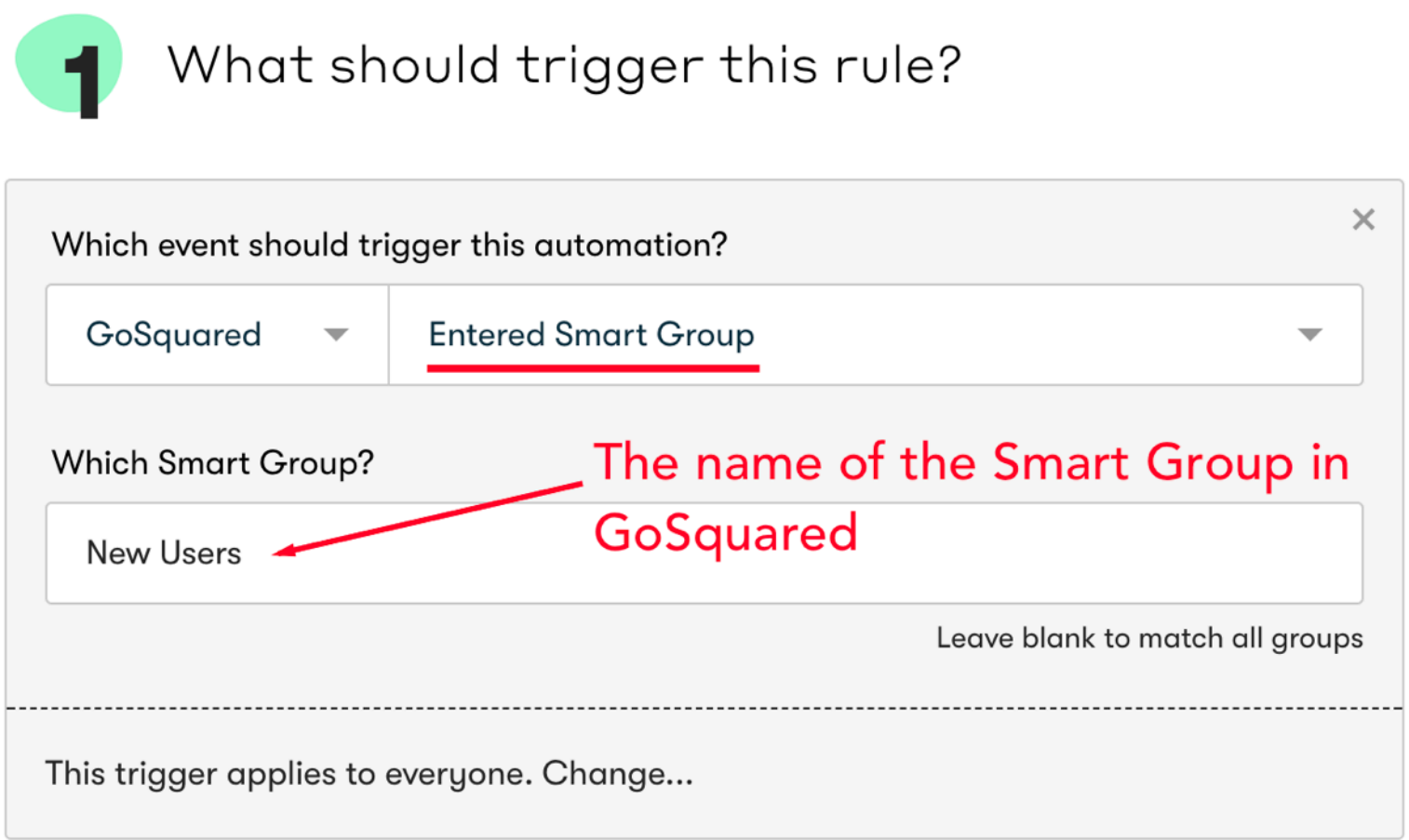
First ensure you've already composed an email campaign that you wish to send. It could be a campaign containing just one email, or a sequence of emails. After you've prepared the campaign, in Drip navigate to **Automation > Rules** in the main toolbar then click the **New Basic Rule** button:



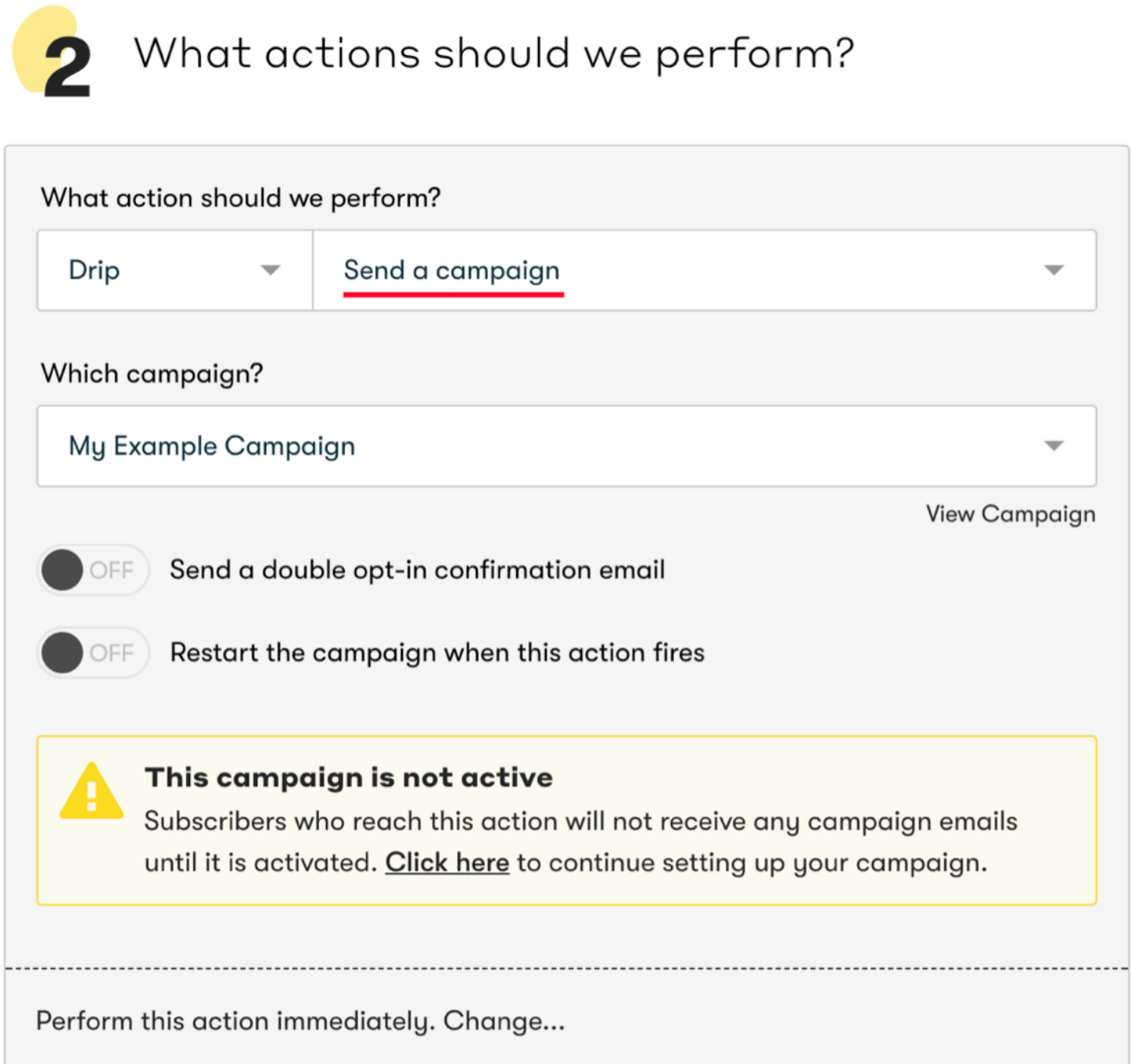
Select GoSquared from the drop down list of 3rd party event providers:



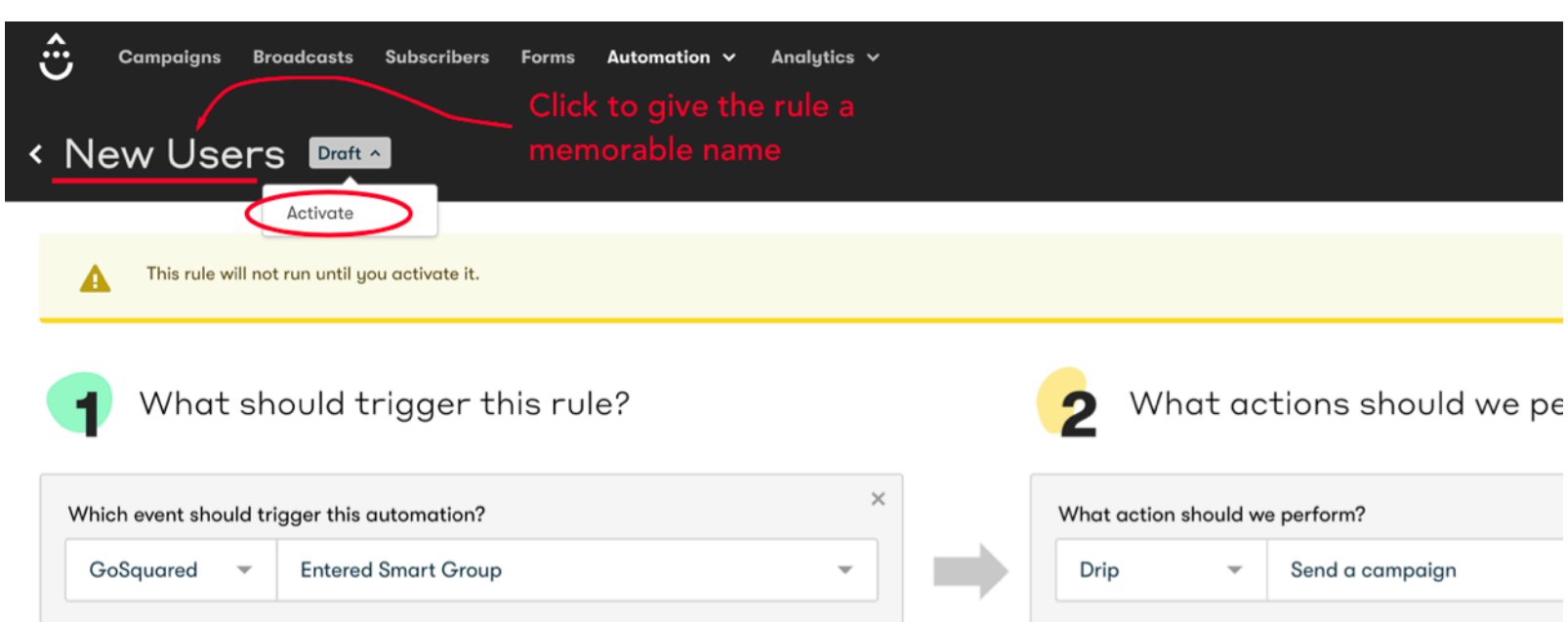
Then in the ‘Choose a trigger’ dropdown menu, select **Entered Smart Group** and type the **name** of the Smart Group that you wish to use. The name must **exactly match** the name that you gave it in GoSquared.



Now we can move on to the second column to define the action Drip should take when a user enters that Smart Group. Select the **Send a Campaign** action and choose which campaign you want to send.



Give the rule a memorable name. Then Activate the rule to turn the automation on:



You can now view the performance of this campaign in the Campaign tab in Drip. You can also see the user level interaction with the campaign in People CRM. You can create additional Smart Groups that filter this behaviour, i.e. completed a Drip email campaign and used subsequently feature X, now subscribe them to a new email campaign.

The following events in Drip will appear against a user profile the People dashboard:

- Subscriber created
- Subscribed to campaign
- Removed from campaign
- Unsubscribed from campaign
- Unsubscribed from all
- Completed campaign
- Applied tag
- Removed tag
- Opened email
- Clicked trigger link
- Became lead

Frequently asked questions

How do I email existing users in a Smart Group?

You can do this by adding a time based filter to the Smart Group. For example, you can add **“Last Seen” “Less Than 7 days ago”**.

Over time, existing users will drop out of that group and when they re-enter the Smart Group the notification to Drip will be sent and they will be subscribed to that campaign.

If a user enters/exits a Smart Group will they be sent multiple emails?

No. Once the email address has been added to the campaign in Drip a duplicate one is not accepted.

What happens if I change a filter in a Smart Group after the campaign has been set up?

If you decide to alter or add another filter to the Smart Group being used to automate a Drip Campaign it will update and start sending notifications based upon the new rules.

This is great if you want to quickly target a new segment of users.

What’s a good way to get testing the integration?

You can create a Smart Group that only you enter and exit. Just add the filter “**email is exactly name@business.com**”. Then set an event based filter for an action on your site, such as **“last clicked button X within the last 2 minutes”**.

You can then go into Drip and remove yourself as a subscriber to that campaign if you want to test it again.

Anything else I should know?

If using really granular time-based filters, don’t go lower than the action being performed in the last 2 minutes.

Use a customer's first name in an email

When creating an email template in Drip, you can automatically address a customer by their first name using Drip's liquid syntax. GoSquared passes the customer's full name to Drip, so if you want to convert this to just their first name, just copy and paste this as the first line of your email:

```
Hi {{ subscriber.name | truncatewords: 1, '' | capitalize | default: "there"}},
```

This tells Drip to do the following :

1. Add the “**subscriber.name**” property.
2. Truncate the full name to just use the first word of the name.
3. Capitalise the first character of the first word.
4. Then finally, if there is no name provided, just default to say “**there**”.

For example it would convert “joe blogs” to “Joe”, making the opening line of the email read:

“Hi Joe,”

Or if no name was provided it would default to:

“Hi there,”

Writing great emails

Avoid writer's block

After setting your email automation rules, probably one of the most difficult parts is figuring out what to write! We've tried to help by giving you a few templates to start off, focusing them around different points you can target through the customer journey.

Education is the best marketing

While a visitor may have signed up to your newsletter based on a piece of content you had produced, the purpose here just to ensure the reader understands the link between your content and the problem your company solves.

The focus is not about selling or converting but starting to nurture a lead by helping them discover your brand, and building a connection through sharing useful content (ultimately driving back to your site.) Your newsletter will also be doing its job to keep you front mind, so live longer intervals here.

Send on day one

Subject Line: <Engaging Subject Line>

I'm **YOUR NAME**, the founder of **COMPANY**, I wanted to drop you a quick note to personally thank you for signing up to our newsletter.

At **COMPANY**, we started our blog to provide more resources for people looking for help **PROBLEM COMPANY SOLVES**. We hope you find the content useful.

We update content on our blog regularly that helps with **PROBLEM COMPANY SOLVES**, some of that that may not make the newsletter. If it sounds ok, I'll send you an email with a short description of a new article, why I think it's important for you and a link to the full article.

We hate spam as much as you do so we promise not to inundate you, we'll only be in touch when it's relevant. However sometimes our emails can get caught in filters so here's a couple of ways to avoid that:

- Whitelist emails from **EMAIL DOMAIN** and **YOUR NAME**.
- If you're a Gmail user, drag any emails from **COMPANY NAME** into your Priority Inbox.

Also a pro-tip, create a dedicated folder for emails from **COMPANY**, that way you'll have a centralised hub of information about **PROBLEM COMPANY SOLVES**.

Thanks again!

NAME

TITLE

WEBSITE

P.S. If you liked our last blog post, you should also checkout this article too **LINK TO BLOG POST**

Send on day 30

Subject Line: <Engaging Subject Line>

Hi **NAME**,

Hope all is well and you're still enjoying our newsletter. Please let us know any feedback you have. It's really helps us to shape the future content we include.

Although it didn't make our last newsletter, we just published this article and I thought you might find it interesting too: **LINK TO BLOG POST**

Let me know if it's useful!

Thanks,

NAME

TITLE

WEBSITE

Send on day 60

Subject Line: <Engaging Subject Line>

Hi **NAME**,

I remembered you discovered us through a piece of content about **PROBLEM COMPANY SOLVES**.

We got quite a bit of good feedback about this post, **LINK TO BLOG POST**, I thought you might also find some value in it too!

Let me know your thoughts!

Thanks,

NAME

TITLE

WEBSITE

Position yourself

If you've identified a user that has explicitly displayed interest in your product or service (as opposed to just signing up your newsletter or exploring content.) There's a high probability you're catching them in a researching or consideration phase.

You have a shorter window here so reduce the time between emails and focus your cadence more around your product/service.

Send on day one

Subject Line: <Engaging Subject Line>

Hi **NAME**

We really appreciate you getting in touch to learn more about **COMPANY**, As you're probably aware by now at **COMPANY**, we help **TARGET AUDIENCE PROBLEM COMPANY SOLVES**

It would great to learn more about your specific challenges, so please let us know a time that suits for a call.

In the meantime here's **LINK TO FEATURES PAGE**, that should be helpful.

Look forward to hearing from you.

NAME

TITLE

WEBSITE

Send on day three

Subject Line: <Engaging Subject Line>

Hi **NAME**,

Because we work so much with **YOUR TARGETED INDUSTRY**, I thought it would a helpful to show how we help companies like **COMPANY** with **PROBLEM COMPANY SOLVES**.

Here's a recent case study **LINK TO CASE STUDY PAGE** that shows how we helped **RESULTS FROM CASE STUDY**.

Thanks,

NAME

TITLE

WEBSITE

Send on day seven

Subject Line: <Engaging Subject Line>

Hi **NAME**,

We know how hard it can be to **PROBLEM COMPANY SOLVES**, in **YOUR TARGETED INDUSTRY**.

Here's **LINK TO BLOG POST**, that a lot of our customers found quite helpful.

Did you mange to find a solution yet? If not please let us know a time that suits for a call and we'd love to show how we can help

Thanks,

NAME

TITLE

WEBSITE

Close the deal

When a visitor has displayed buying intent by displaying signals like viewing your pricing page, your window to convert is going to be even shorter.

The content should be less focused on your product/service. Try immediately to coordinate an opportunity for conversion and reiterate their pain point.

Send on day one

Hi **NAME**

Thank for getting in touch to learn more about **COMPANY**.

I'm available for for a brief call either **POTENTIAL DATE** or **POTENTIAL DATE**. Please just let me know a time that works best for you.

Look forward to hearing from you and connecting then.

NAME

TITLE

WEBSITE

Send on day two

Hi **NAME**,

I wanted to quickly follow up on my last email. I know you probably deal with **PROBLEM COMPANY SOLVES**, so I thought I'd share a quick tip many of my clients have found helpful: **ADVICE**

I'd love to share more and how we've helped other customers solve **PROBLEM COMPANY SOLVES**. Were you still available for a quick call?

Thanks,

NAME

TITLE

WEBSITE

Send on day three

Hi **NAME**,

Last email from me on this I promise!

I hadn't heard back from you but just wanted to follow up one last time as you looked like a really good fit for **COMPANY**.

I genuinely feel we can help you with **PROBLEM COMPANY SOLVES**. Here's a recent case study how we've helped others in **YOUR TARGETED INDUSTRY**, **LINK TO CASE STUDY**.

Thanks,

NAME

TITLE

WEBSITE

Remember, if you have live chat enabled on your website, you have a conversion tool at your fingertips. Any opportunity you can use an email drive a lead back to your site, you're in prime position to convert them in the context of your site.

5 tips on how to close more deals with live chat

You've nurtured a lead through the funnel and now they're back on your site, ready to buy. Here's our top tips for closing a sale through live chat.

Make sure you're talking to the decision maker

You can do a great job qualifying a lead based on the data you collect about them through the purchase journey. GoSquared can automatically tell you the job title and company information of the person you're chatting with.

Every company is structured differently though, so take the opportunity to ask them who's responsible for making the purchase.

You may have the sales acumen of Jordan Belfort but unless you're talking to the person that can say "yes", your efforts will most likely go in vain.

Focus on the problem, not the competition

When a lead asks you how you compare to your competitors, focus on the problem you solve.

When shopping for a product or service, the majority of people are looking to solve a problem they currently have.

When a lead asks you "how do you compare to competitor X?" the temptation is to go down a feature comparison rabbit hole, but it's almost always best to avoid this.

It can add complication and confusion to their buying process when ultimately there is still a problem to be solved.

Bring the conversation back to the core reason your lead came to you, to solve their problem.

Answer the question with, "What were you actually looking to achieve with our product?"

If your product really does solve their problem today, a comparison of features should become a lot less relevant. That enables you to position yourself to reinforce the value of your product and be in the best possible position to close.

Delay the pricing discussion

When a visitor leads with a question concerning price, it can lead to a conversation that ignores the true value of what you're offering. You can find yourself being encouraged to offer a discount before either party even knows what's on the table. To avoid offering discounts early on, ask a question in response.

If a lead opens the conversation by asking "How much does your product/service cost?", respond with an open ended questions but be creative with your response.

Most buyers are astute enough to not bite when you ask "what type of budget did you have?" Instead, respond with something unrelated to price.

If you respond with something along the lines of

"Happy to help, what were you looking to use our product/service for?"

What you're aiming for here is to take the conversation away from price. Like before, you're giving yourself an opportunity to explain the value of your product service and make sure they know how it solves they pain point.

Positioning your price point after this conversations helps to justify your value in a dramatically more effective way.

When a lead wants a discount, get them to anchor themselves

It happens more than you would imagine but if a savvy lead is ready to buy, a lot of time they'll try their luck and ask for a discount. When a visitors asks

"I really like your product/service but I need a discount?"

Get them to anchor themselves to an existing price point. It avoids them throwing out an arbitrary price for your service such as "Can you offer it for $100?"

Respond with something like:

"That's great, what was the price of the plan / product were your interested in?"

They'll invariably say something like, "Your $250 product/plan."

At this point they\ve anchored themselves to that price and (if you do want to offer a discount to close a deal) it puts you in control of a starting point. You're now in a position to start by offering a marginal discount, for example 10%, off if need be.

Ask for the sale!

If you have someone on your site, displaying intent, engaging with you - simply ask them if they want to buy.

Phrase it however it feels most comfortable and natural for your site, but ask the question.

- "Did you want to buy today?"
- "Are you ready to sign up today?"
- "Unless you have any other questions, I can get you set up right now if you like?"

Just try asking the question. Don't assume there will be another opportunity. Act now, not tomorrow!

It's time to grow!

We hope this guide has given you a good overview on how to start to build a conversion strategy around your website traffic.

If you have any questions we're always happy to help. Feel free to email us directly at russell@gosquared.com

And if you haven't already, sign up to GoSquared today for a free trial at gosquared.com/join/ebook/