



Conversion Rate Optimization Checklist:

A Step-by-Step Review



- A systematic, step-by-step checklist removes guesswork from optimization



- Turns data into structured, evidence-based growth decisions



- Ideal for growth teams, marketing leads, and site operators



- Surfaces missed revenue by validating every critical step



- Outcome: repeatable review process to apply today

CONVERSION PATH MAP



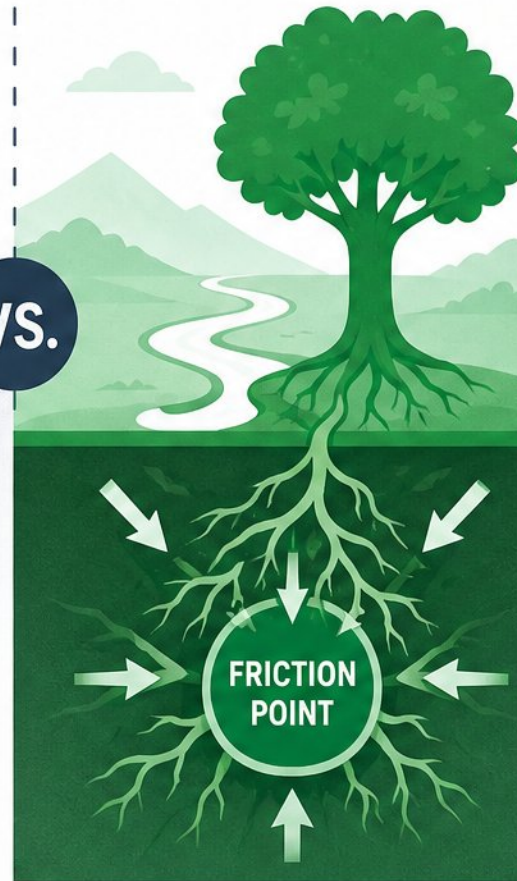
Why Most Optimization Efforts Miss the Mark

SYMPTOM-FIXING (SURFACE LEVEL)



VS.

DEEP-ROOTED FRICTION DISCOVERY (UPSTREAM)



- Chasing blended conversion rates hides real segment-level friction



- Safe micro-tests rarely move revenue—wins are 2-8% at best



- Ignoring qualitative data and user intent behind the numbers



- Launching changes without a review protocol causes false confidence

Adopting a Diagnostic Review Mindset



- Treat the checklist as a diagnostic tool, not an approval gate



- Separate business assumptions from measurable on-site behavior



- Define one primary conversion goal before reviewing any page



- Agree on what counts as a meaningful lift before testing begins





Step 1: Map the Core Conversion Path



- Map the shortest route from intent to purchase



- Spot disconnected CTAs, competing actions, hidden decision points



- Check message match between traffic source promise and landing page



- Use funnel and segment data to find the highest-loss stage

CONVERSION PATH MAP





Step 2: Audit On-Page Persuasion and Messaging



- 1 **Headline clarity and benefit-first value proposition above the fold**



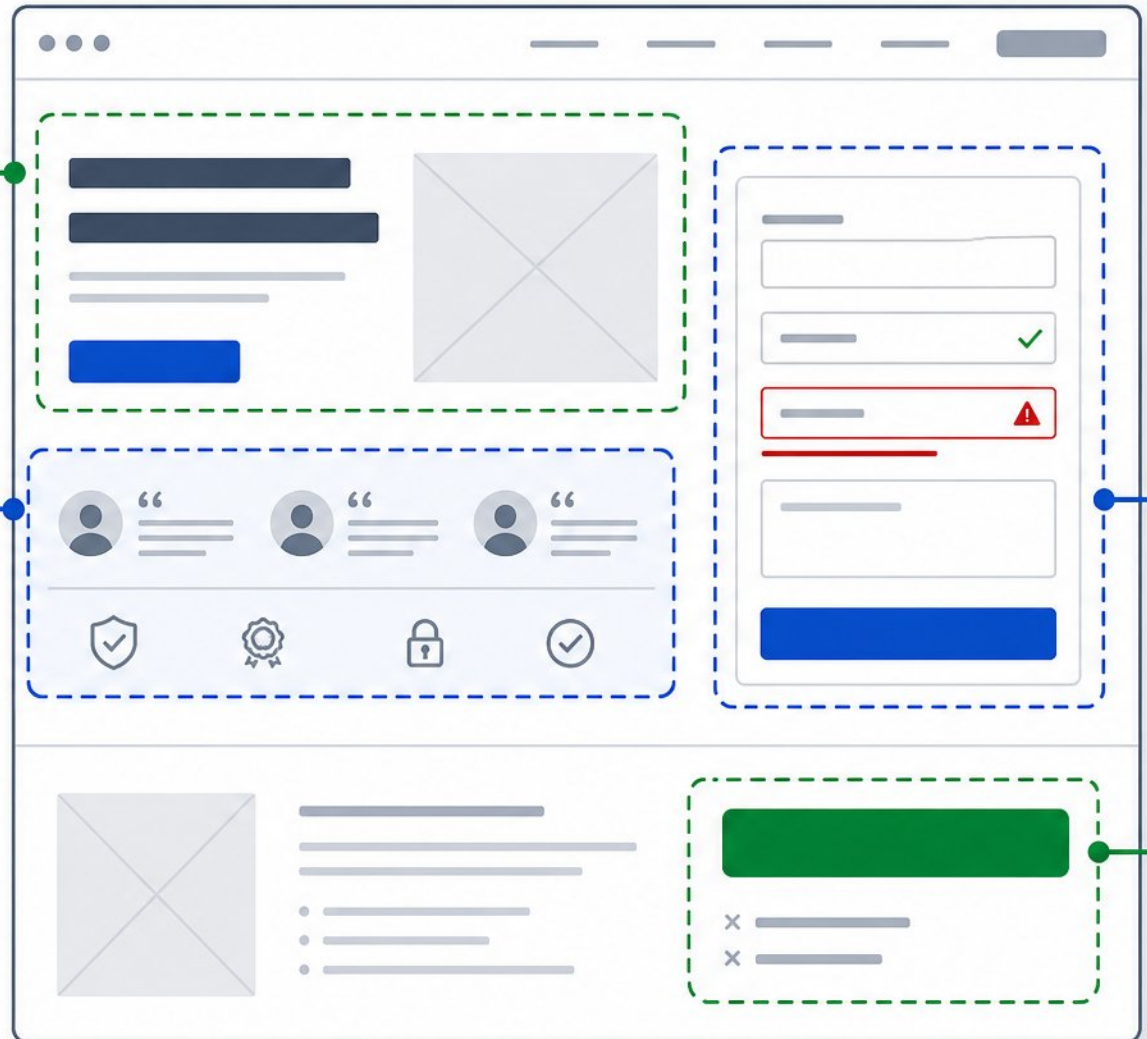
- 2 **Specific, credible social proof and trust markers near decisions**



- 3 **Trim forms: fewer fields, clear labels, inline validation, error recovery**



- 4 **Singular, visible CTA; remove competing links and distractions**



Step 3: Remove Checkout and Form Friction



- Show total landed cost early to prevent surprise-fee abandonment



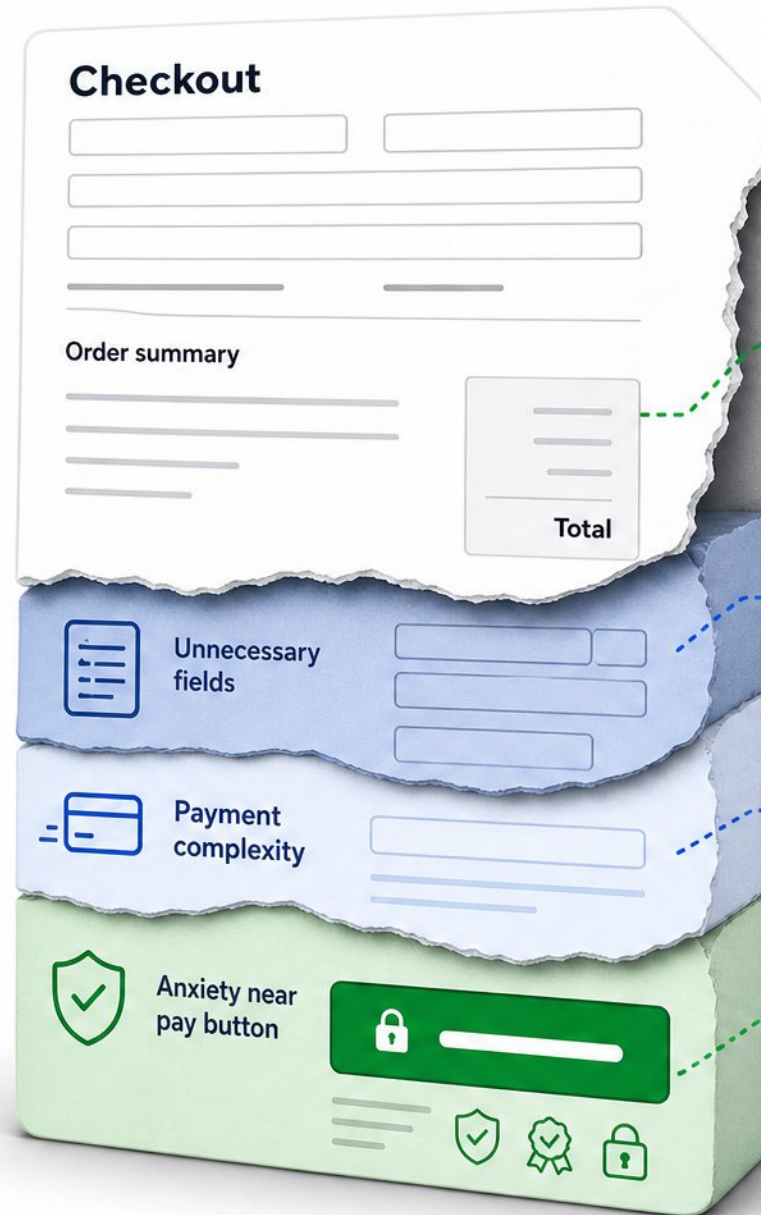
- Enable guest checkout and cut forms to the minimum viable fields



- Support express payment methods and clear validation messaging



- Place trust signals near the pay button where buyer anxiety peaks



Friction Point
Surprise fees discovered late increase anxiety and abandonment.

Friction Point
Long forms create friction and lead to drop-offs.

Friction Point
Unclear errors or limited options cause hesitation.

Friction Point
Lack of trust signals increases anxiety at the final step.

Step 4: Evaluate Speed, Accessibility, and Device Experience



- LCP under 2.5s, INP under 200ms, CLS under 0.1



- Mobile CWV affects up to half of the conversion gap



- Accessibility failures block progress and create distrust



- Performance is a revenue lever, not a vanity metric

Core Web Vitals



LCP



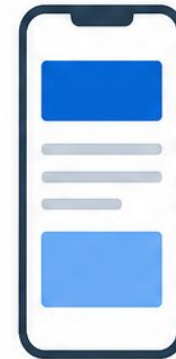
INP



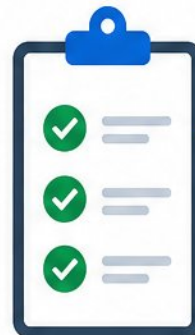
CLS



Device Experience



Accessibility



Step 5: Validate with Qualitative Feedback



- Watch session recordings and heatmaps for hesitation and rage clicks



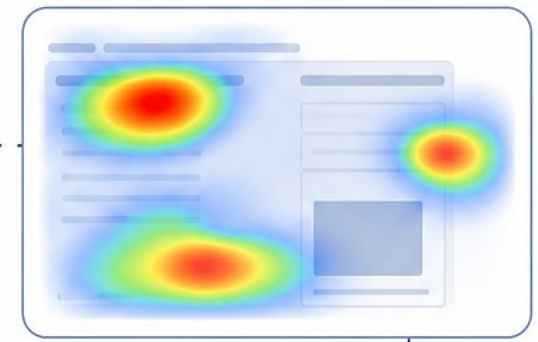
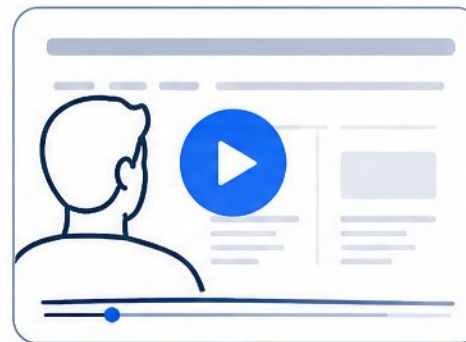
- Use exit-intent surveys and live chat to hear objections directly



- Match customer wording to page copy and objection handling



- Turn observed friction into clear, prioritized test hypotheses



“I’m not sure this will solve my problem.”

“Too complicated to understand.”

“What happens after I sign up?”





Step 6: Prioritize Changes with a Scoring Model



- Score opportunities by impact, confidence, and ease using ICE or PIE



- Avoid testing everything at once or chasing safe micro-tests

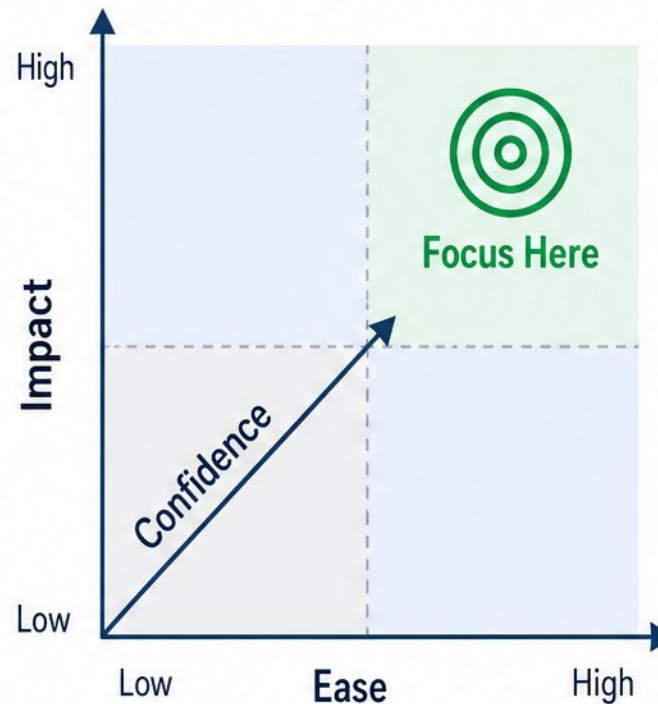


- Create a short backlog aligned with business priorities and traffic volume



- Document why each item made the cut and what evidence supports it

Prioritization Matrix (ICE or PIE)



Short Backlog











Evidence Artifact

Keep a simple record for each shortlisted item: rationale, assumptions, and supporting evidence.



Step 7: Check Test Quality Before Launch



- Confirm sample size, duration, and success metric first



- Verify tracking captures the right goal in analytics



- Watch for interaction effects, novelty bias, seasonality



- Define stopping rules and decision criteria upfront



Turning Results into the Next Review Cycle



Document every test outcome, including failures



Segment results by device and traffic source



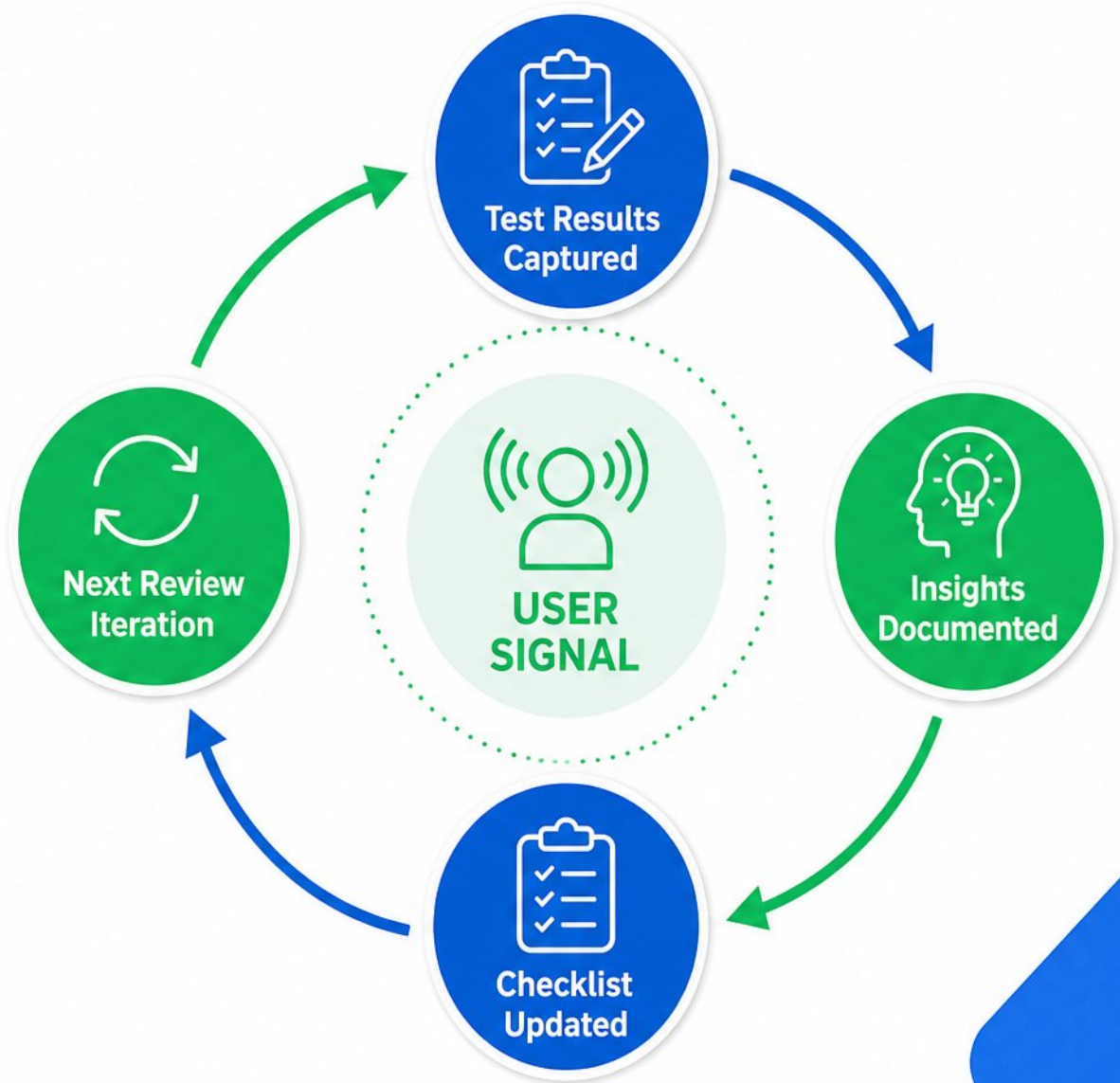
Distinguish real signals from seasonal noise



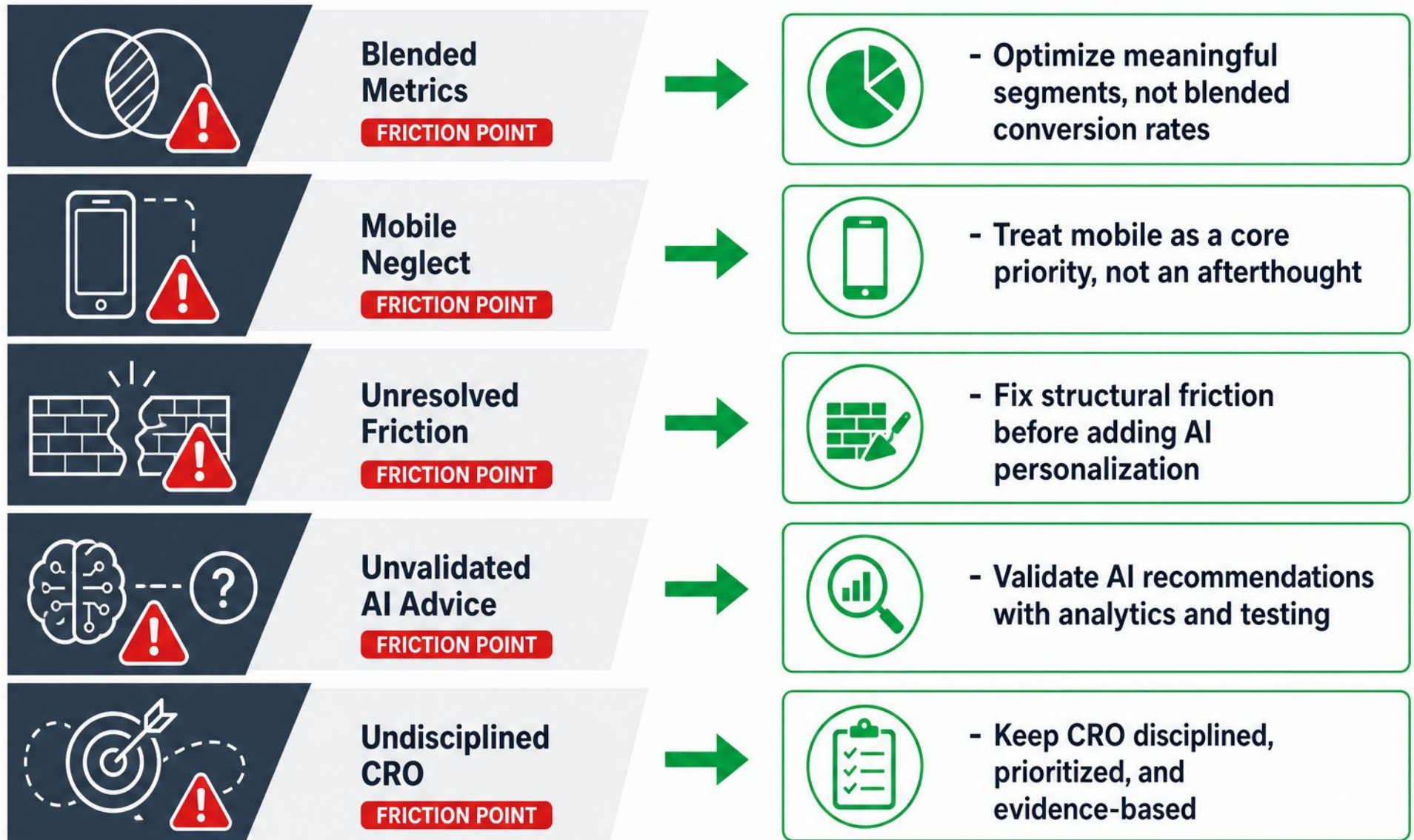
Roll out proven winners, then feed learnings forward



Build a repeatable, cross-functional review cadence



Common Pitfalls and How the Checklist Prevents Them



Action Plan: Run Your First Structured Review



 **NEXT REVIEW:**



PersonWise.

PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/8b5dd45a/public