Case Study

Equity Trust’s Conversion Optimization Strategy

200%

Lead Generation Conversion Rate Lift

Business: Equity Trust
Sector: Finance
Optimized Conversion: Member Sign Ups
Solution: Web Redesign Conversion Analysis
Expert Conversion Advice Ensures a Successful Website Redesign for Equity Trust

Equity Trust is the nation’s leading provider of self-directed IRAs and 401ks, with $12 billion dollars of retirement plan assets under administration. When they embarked on a website redesign project, they needed to make sure it wouldn’t hurt their business results.

They’d engaged with WiderFunnel for A/B testing before, which had multiplied their landing page conversion rates. They knew they needed to tap into WiderFunnel’s experience to ensure a successful redesign.

In the end, we helped the design agency avoid 54 potential conversion barriers and the new site produces nearly three times as many leads for their sales team.
Here’s how we did it.

The Client: Equity Trust

Equity Trust is the nation’s leading provider of self-directed IRAs and 401ks, with over 130,000 clients in all 50 states and approximately $12 billion dollars of retirement plan assets under administration.

Truly Self-Directed IRAs and other retirement plans allow clients to create lasting wealth by investing in areas where they have knowledge, expertise, and comfort.

In addition to traditional retirement investments such as stocks and mutual funds, clients at Equity Trust can diversify their retirement plans into assets such as real estate, private placements, notes, deeds of trust, tax liens, foreign currency and much more.

As a passive custodian Equity Trust does not offer investments or investment advice.
The Business Need: Conversion Optimization Depth

Ninety percent of new customers first interact with Equity Trust’s sales representatives. But, most visitors were leaving the website without requesting a call.

Equity Trust knew their website was confusing visitors and not communicating their value proposition clearly. They needed to increase their sign up conversion rates, which provide their outbound sales team with the right prospects to call.

Equity Trust management had planned an entire redesign of their website but knew it needed more than just a pretty re-skin. It needed to convert leads. They didn't just want their designers to create a "gut-feeling" based design or simply use qualitative user testing. They needed the new site design to follow tested conversion principles.
The Solution: Web Redesign Conversion Analysis

Equity Trust brought in WiderFunnel's Conversion Strategists to join their redesign team using their Conversion Analysis™ service. The heuristic review of their web design agency's proposed wireframes and designs used the LIFT Model™ to bring in a conversion perspective.

WiderFunnel's strategists took the viewpoint of the company's goals, reviewed wireframes early to avoid unnecessary graphic design work. They recommended layout modifications for the Homepage and conversion path pages to fix the conversion barriers. The design agency fed the recommendations for layout, eyeflow, messaging and calls-to-action into the design phase. Then, WiderFunnel conducted another detailed round of analysis on the design comps for the site-wide templates.

Drawing on experience from thousands of A/B tests, including for Equity Trust's own landing pages, WiderFunnel's Strategists identified familiar patterns and conversion-barriers in the wireframes and designs. Their LIFT Analysis revealed 54 detailed points on the wireframes and design comps. Each a potential conversion barrier that could have hurt Equity Trust's website success.
The Result: New Member Sign Up For Equity Trust

Fortunately, the designers fixed the conversion threats before building the site, ensuring a successful outcome. WiderFunnel's recommendations improved the design, resulting in a more conversion-oriented website that's now a lead generation machine. The new design has lifted lead generation by over 200%.

The company now gets a beautiful new website and more qualified leads for their sales team.
About WiderFunnel

The Original Conversion Optimization Agency, since 2007.

WiderFunnel provides full service Conversion Optimization including: strategy, web analytics, wire framing, copywriting, design, development and website redesign. You get more leads and sales from the same website traffic.

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