Draft

Ecommerce CRO Roadmap

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Hi there, and welcome to **Draft's Ecommerce CRO Roadmap**! In this document, we'll go into detail on what you should be doing to improve your store's conversion rate, AOV, and return on ad spend throughout the year.

CRO isn't just a thing you do once. It's an ongoing practice of researching your customers' behavior, improving your store, and getting the maximum return on your ad spend possible.

With this roadmap, you'll know:

- **What to do *and when*** to maximize the impact of optimization for your store.
- What **blind spots** to watch out for when optimizing a store.
- When to resource **broader activities**, like re-theming or competitive analyses.

How to use this roadmap

Set a recurring calendar reminder for the first work day of the month. Every month, turn to that month's page and follow its instructions. Each month has a broad **theme**, specific **research activities**, and **holidays** to watch out for. Some holidays are specifically color-coded for the US & Canada, as well, and major holidays for ecommerce are in **bold**.

You'll be able to use this roadmap **year after year**, since it doesn't refer to any changing dates – so once January rolls around again, turn back to the beginning and start anew.

Got any questions about this roadmap?

Email us. We'd be happy to chat!

January: Redesign (if you want)

Happy new year! Now that the holidays are done, your risk in redesigning your store is probably at a bare minimum. It's the greatest amount of time until the holidays roll around again, so you'll have plenty of opportunities to fix bugs.

If you want to redesign, now should be the time. If not, you should turn to February and focus on making your store mobile-first.

What to research

- **Usability tests**. Every quarter, you should run a usability test with 5 to 7 participants on a new topic. The best resource for recruitment and execution is [UserTesting](#).
- **UTM Audit**. You should go through the past 6 months of your traffic on Google Analytics and, audit what UTM tags – campaigns, mediums, and sources – are being used by your inbound traffic.
- **Heat & scroll maps**. Every other month, you should run heat & scroll maps for your 3 best-selling products, home page, cart, checkout, thank you page, and any landing pages.
- **Heuristic evaluation**. Place an example transaction on smartphone and desktop, and determine whether there are any usability issues.

Key holidays

- New Year's Day: January 1
- [Martin Luther King Jr. Day](#): the third Monday in January

February: Mobile first

Mobile-first design is the #1 way to improve conversions for most stores, since most stores have a 3x gap between mobile & desktop (and mobile comprises over 80% of wallet-out traffic). You should spend the month focusing entirely on making your store as performant on mobile as possible – and creating processes that prioritize design for smartphones over all other device platforms.

What to research

- **Competitive analysis**. Cast a wide net on all of the possible competitors that your store faces, and run a [SWOT analysis](#) on each of them.
- **Customer interviews**. Get 5 customers on the phone and ask them how they found your business, who else they considered, and if they ran into any issues when buying.
- **Heuristic evaluation** for mobile. Browse, find, and purchase a product on both iOS and Android smartphones and tablets.

Key holidays

- Groundhog Day: February 2.
- [Super Bowl](#)
- Chinese New Year
- Mardi Gras
- Winter Olympics, every 4 years (2022, 2026, 2030…)

- **Valentine's Day**: February 14.

- Family Day

- Presidents' Day: the third Monday of February.

March: One-off optimizations

Once you've wrapped up any redesign or mobile-focused work, your next priority is to get the design back to a solid baseline, so you can resume your testing program.

What to research

- **Post-purchase surveys**. Configure a question on your store's thank you page that asks how the customer felt about their purchase today, and monitor all responses for customer service inquiries and potential conversion insights.
- **Heat & scroll maps**.
- **Auditing previous tests**, so that you make sure that all of your past conversion insights are incorporated in your new theme.

Key holidays

- March Madness
- International Women's Day
- Daylight Saving Time Starts
- Commonwealth Day
- St. Patrick's Day: March 17.
- First Day of Spring: March 19 or 20
- Easter Sunday

April: Hire for CRO (if you haven't yet)

Do you not have any resources for optimization? You should probably hire one. [Hiring and training for CRO is notoriously difficult](#), and you'll want any optimization resource to spend as long as possible getting your store's conversion rate as high as possible before the holidays.

Stores who hire for CRO early in the year win at the end. Period. And the holidays are make-or-break for pretty much everybody. Once you have somebody hired, their first job should be to create a testing plan for you – so you have several months of optimization ahead of you.

What to research

- **Usability tests**.
- **Customer interviews**.
- **Funnel analysis**. In GA, you should take a look at every step of your checkout funnel – and isolate any issues with uncommonly large drop-off points.
- **Customer service inquiries**. Talk with your support staff, and identify any issues with the store that are commonly appearing in customer service calls.

Key holidays

- April Fools Day: April 1
- Stanley Cup Playoffs
- Tax Day: April 15

- Earth Day: April 22

- First Day of Passover

- Administrative Professionals' Day: April 27

- Last Day of Passover

May: Cart & checkout

This month, you'll be focusing on making your cart and checkout pages as easy to use as possible. In-page cart and mobile checkout improvements map to a higher conversion rate – as well as removing any redundant Javascript that might slow down customers' browsers.

What to research

- **Competitive analysis**.
- **Heat & scroll maps**.
- **Heuristic evaluation**.

Key holidays

- Cinco de Mayo: May 5
- Mother's Day
- Victoria Day: May 23
- Memorial Day: last Monday of May

June: Product configuration

On most themes, the default way that people configure products could stand to be improved. Color, size, and quantity options aren't ideally expressed in product pages' interfaces – for both desktop *and* mobile.

This month, you'll work on making your product pages as easy to work with as possible, so customers can easily get to the next step: adding to cart.

What to research

- **Post-purchase surveys**. Take a look at the most recent answers to your post-purchase survey, and determine whether there are any new insights you can gather for improving your store's usability.
- **Customer interviews**.

Key holidays

- NBA Finals
- Ramadan Starts
- Flag Day: June 14
- Father's Day: third Sunday in June
- First Day of Summer: June 20, usually

July: Home & landing pages

Now that you have your product, cart, and checkout pages optimized, it's time to look at the other places where your inbound traffic is directed: your home and landing pages. Here, you'll be researching changes to your initial pitch and brand messaging.

What to research

- **Usability tests**.
- **UTM analysis**.
- **Heat & scroll maps**.

Key holidays

- **Canada Day**: July 1
- **Independence Day**: July 4
- Eid al-Fitr
- Parents' Day: July 24

August: Navigation

Information architecture sounds unsexy, but it's vitally important for the way that people browse for and find the things that they want on your store. And [most businesses screw it up](#).

This month, you'll work on making your products easy to browse, search, sort, and filter – so people can buy what they want more quickly and easily.

What to research

- **Competitive analysis**.
- **Customer interviews**.
- **Annual survey**. Once a year, you should do a deep-dive, multi-page survey into all of your past customers – with the enticement of a one-time-use coupon at the end. This will give you greater insight into their motivations, demographics, and purchasing habits.

Key holidays

- Summer Olympics, every 4 years (2020, 2024, 2028…)
- **Back to School**: August 15

September: Upsells

If you run an online store, you probably care a *lot* about your average order value, or AOV. If not, you should.

Upsells increase AOV. They do so reliably, and can be implemented in ways that aren't skeezy or customer-hostile. Done right, upsells increase your top-line revenue *without* changing your conversion rate *or* ad spend.

This month, you'll be focusing on what you upsell, when you provide the upsell in a transaction, and what behavior triggers your upsells.

What to research

- **Post-purchase surveys**.
- **Heat & scroll maps**.
- **Customer service inquiries**.

Key holidays

- Labor/Labour Day: first Monday in September
- National Grandparents Day: September 11
- Eid al-Adha
- First Day of Fall: September 22, usually

October: One-off fixes, again

The holidays are coming. You need to make sure everything is working perfectly, so you can make the most out of your optimization across the past year. Now is a great time to make sure that your one-off fixes are still, you know, *fixed*.

What to research

- **Usability tests**.
- **Customer interviews**.

Key holidays

- Rosh Hashanah
- Columbus/Indigenous Peoples' Day: second Monday in October
- Thanksgiving Day: second Monday in October
- World Series
- Diwali
- Halloween: October 31

November: Sales landing pages

It's November, so you probably have a sale of some kind planned at the end of the month. Now is a good time to create and optimize your holiday landing pages, so that they can work as hard for you as possible when it really counts.

What to research

- **Competitive analysis**.
- **Heat & scroll maps**.

Key holidays

- **EOY budget planning** for most businesses
- Daylight Saving Time ends
- Election Day: the first Tuesday after the first Monday of November
- Remembrance Day / Veterans Day: November 11
- Thanksgiving Day: last Thursday in November
- **Black Friday**: day after Thanksgiving
- **Small Business Saturday**: Saturday after Thanksgiving
- Grey Cup
- **Cyber Monday**: Monday after Thanksgiving
- **Giving Tuesday**: Tuesday after Thanksgiving

December: Holiday testing

If you have already fixed any major usability issues, you have enough traffic to call tests in 1 week, your store plans on being around for the long haul, and the demographics of your store do not significantly change from year to year, then you should run a few rounds of rapid-fire tests between Thanksgiving and the shipping deadline for Christmas.

What to research

- **Post-purchase surveys**.
- **Customer interviews**.

Key holidays

- First Day of Winter: December 21, usually
- Hanukkah
- Christmas Eve: December 24
- **Christmas Day**: December 25
- Boxing Day: December 26
- Kwanzaa
- New Year's Eve: December 31

Wrapping up

Want to learn how to put research-driven optimization into practice?

Check out our latest book, **Value-Based Design**. It provides the tools, tactics, and above all the *mindset* necessary to continue capturing lost revenue for your store.

Got any big wins from this roadmap?

Did this roadmap help you make sense of how to practice CRO for *your* store? Did it help you find insights that increased conversion rate or AOV? **We love it when people share their wins with us.** Love, love, love it. Literally cannot get enough of it.

So! Mash this link and tell us about *your* wins. We'll give you another useful gift for your time, and we might even feature you on Draft's site.

Thanks again

Thanks again for reading – and again, please reach out if you have any questions or requests for additions to this text. We appreciate your time and attention, and hope that this was useful for you and your store!

Take care,

— *Nick Disabato*