grow.

Vol. 2

Becoming a full-stack freelancer

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INTRODUCTION

Chances are, you're really, really good at something. It's probably the thing you're trying to build your business and reputation around. Perhaps it's your development skills, your design eye, or your ability to turn simple words into copy that converts.

Honing the skills that differentiate you is important, but this book will challenge you to become a full-stack freelancer—someone who is versatile, indispensable, and the type of person that clients want to continue working with.

Each chapter of Grow Vol. 2 will walk you through an additional vertical where you can provide services and expertise to existing clients.

By growing your roster of service offerings, you'll fast-track your way to success as a full-stack freelancer.

Let's start stacking up those skills.

CONTENTS

1 / Contracts

How to build a killer long-term contract

LAURA MURPHY, FREELANCERS UNION

A man might have his dog, and a girl may have her diamonds, but a rock-solid contract is a freelancer's best friend. If you're not using a contract for every agreement, you're not practicing safe freelancing and you're leaving yourself and your business vulnerable.

Reasons to get your legal affairs in order

1. Having a contract prevents issues of nonpayment
Did you know that 71 percent of freelancers experience client nonpayment at least once in their career? Within that 71 percent, the average freelancer loses almost $6,000 in income.

If you want to avoid lining your pockets in IOUs, a contract will communicate payment terms at the outset—and let otherwise unscrupulous clients know that they won't get away with scamming you.

Furthermore, if it comes to it, a contract is the best asset to have on hand if you have to take a case of nonpayment to court. (You can learn more about the nonpayment issue and join the Freelance Isn't Free Campaign at Freelancers Union).

2. Use a contract to set clear deliverables
We've all been there: communication lines get crossed and you wind up doing twice the work because you didn't deliver what the client wanted the first time around. A contract is a handy excuse to get all your deliverables down in writing—so your client knows what to expect from you, and you know what you need to do for your client.

That way, if there's some dispute about the scope of work later, you can point to the contract and renegotiate if appropriate.

3. Contracts outline contingencies for worst-case scenarios
Spent hours on a project only to hear from your client that it's been cancelled? A contract can stipulate what will happen in this kind of situation. Do you charge a kill-fee? Are you paid for work completed?

Similarly, if you and your client need to part ways, a contract will set out expectations in that scenario—for example, how many weeks' notice you or your client needs to give, what happens to your work when you no longer work for the client, etc.

4. Contracts help you keep accurate tax records
Sure, you can rely on digital invoices and payment receipts, but contracts provide a pretty indisputable explanation of from where your income is derived. If the IRS comes knocking, you'll have a nice stack of evidence to prove that you are indeed the freelancer you say you are.

5. Contracts make you look more professional
It's more psychological than legal, but just like your bright, shiny website, fancy business cards, and workplace-appropriate attire, a contract can go a long way in proving your legitimacy to a client. As freelancers, we know that reputation is a big part of the game, and emphasizing your professionality means that you'll be more likely to score bigger, more lucrative clients.

What to include in your on-retainer contract

When you've evaluated whether your client might be open to the idea of you working on retainer, it's time to start putting together a basic contract for the agreement.

For on-retainer clients, we recommend starting out with a traditional contract template, then augmenting it with special clauses applicable to a long-term agreement.

We recommend doing this before pitching to your client for a couple of reasons. First, it helps you define your vision for how the relationship will go—which will make it easier to sell to your client. Second, leading the agreement gives you the upper hand in negotiations.

As you're coming up with appropriate terms for your contract, be sure to include the following:

- The amount you are entitled to receive each month—are you charging by the hour or by the project? (For example, 25 hours per week of consultation services, versus four blog articles per week.)
- A detailed description of the "scope of work," including milestones, deliverables, and the dates they are due.
- A definition for how the terms of the arrangement can be altered (i.e. "mutually agree to changes in the scope of work, which must be written and attached as an addendum to the original agreement").
- Contact information, including the business addresses of both you and your client.
- Terms that protect you in case of late or nonpayment.
- Any invoicing procedures you're expected to follow.
- During what hours you're available for your client to contact you.

- At what date your client needs to let you know about the next month's work.
- What notification you need before the retainer relationship can be ended.

Be sure to research your specific industry for any particular clauses that you may need to include. For example, many writers like to include indemnification clauses, while many artists and photographers will want certain clauses around licensing their work.

How to pitch an on-retainer contract to a client

You've evaluated your client and project for long-term potential and outlined the terms of your ideal partnership. Now, all you have to do is convince your client to climb on board!

Here are a few strategies for a successful conversation.

1. Lay the foundation
Start the conversation by reminding your client about your past successes with them and your dependability. Let them know how much you enjoy working with them to reinforce their perspective on your great working relationship.

2. Talk value, not rates
This is not a time to negotiate your rates, but it can be a good time to pitch additional services for more money. You can and should embed discounts in your on-retainer agreement, but you should also take the opportunity to show your now-trusting (and trusted) client how you can add value to their business with a few more offerings. Focus on how your client can profit from your services long-term.

3. Suggest a trial period
We're all a little bit commitment-phobic, so ease the transition by suggesting a trial period. It's a great way to ease into the partnership and find out if this new agreement works for both you and your client. ■

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2 / User research

Helping your clients understand their customers

ROB MILLS, GATHERCONTENT

It's one thing for your clients to know their customers; it's another for them to understand their customers. Knowing is focused on top-level data and information such as number of visits to a website, total social media followers, or the amount of people signed up to mailing lists. The big numbers are necessary and interesting, but it's when your clients move from knowing to understanding their customers that they can start to make informed decisions about content, and begin to target their audiences effectively. Sometimes, they can't do that on their own, and that's where you come in.

Understanding audiences involves looking at the demographic, cultural, and socio-economic components of those "big numbers." It also includes behaviours, motivations, needs, and (where relevant) any empathetic considerations as to when customers will be interacting with products, services, and content. This understanding can help you segment audiences and provide additional information about customers so your clients can benefit in several ways.

Why it pays to understand

There are benefits for both your clients and their customers when they understand who their audience really is.

From the client perspective, they benefit from:

- Being able to position their marketing and content so it is more likely to reach the intended audience
- Forming a vocabulary that will resonate with their customers
- Having the know-how to create tools and processes to ensure all content is meaningful to their customers
- Being able to talk to their customers in an authentic and consistent voice and tone that reflects and supports their own brand identity

Your clients' customers benefit because:

- They get the content they need, when they need it, where they need it, and how they need it
- They are spoken to in a voice and tone that appeals to them
- Their user experience is better because all decisions leading to content creation have been informed

Collectively, the above benefits ensure that business goals for your clients and their customers are all met. This is the sweet spot where content can be purposeful and effective.

The research loop

We've looked at what the difference between knowing and understanding is, and also the benefits of the latter. The next step is outlining the methods and processes available to gain that understanding.

The process that follows belongs to the perpetual research loop consisting of:

Pre-research > Conducting research > Post-research > Repeat

Before any research is started, the purpose of it should be identified. What are you trying to find out and, of course, why? Is the research based on any existing data? Is it due to a new product or service being launched? Are you trying to build on your knowledge of an existing audience, or are you hoping to target someone new?

Once this purpose or hypothesis is known, ensure that everyone involved in the research is aware of this. There has to be a shared goal that is being worked towards. This is especially true if any third parties or external consultants are involved in conducting the research.

Treat this research like you would any other project by:

- Writing a brief
- Considering the resources needed
- Getting stakeholders on board
- Putting a timeline in place
- Deciding how the results will be disseminated
- Outlining a post-research plan to ensure your investment in the research isn't wasted

As part of the research planning—with available resources and project goals in mind—you can make decisions around what research methods to invest in. The choices can be overwhelming and include, but are not limited to:

- Focus groups
- Interviews (stakeholder, user)

- Surveys
- Analyzing existing data (analytics, social insights, etc.)
- Observation/user testing
- Content inventories and audits

There's plenty of information available about these different methods. Take the time to figure out if quantitative, qualitative, or both research types are best for your goals. There are pros and cons to each, and varying levels of resources needed to plan, conduct, and analyze the results from your research.

Once the research has been conducted and your clients have started to understand their audience, the desired outcomes can be achieved and created—outcomes such as usable and functional tools and documents. Here, the options include:

- Research reports
- Recordings of user testing
- Personas
- User/buyer journeys
- Content and style guidelines
- Updated project scopes and plans

What you need may vary depending on what the stakeholders' expectations are, but you should ensure all outcomes are going to be used. Why else invest in the research in the first place? Style guides may be more likely to be used if online, rather than if they're in a big manual left in a desk drawer. Personas can be displayed as posters so they are used and not ignored.

Successful research (and the resultant understanding of it) comes down to effective dissemination of the data and information to relevant people and teams.

Stakeholders are key here, but so too are:

- **Content creators**: What research outcomes do they need to know to understand the audience they are writing for? Do they have to write in a certain voice and tone? How accurate and relevant is existing content?
- **Designers**: They need to know who they are designing for. Share personas with them, but not just via email—present them to the designers and explain how they came to exist. Ideally, get them involved in the process of creating personas. Anything around user and buyer journeys is important here, too. Even more so for...
- **Developers**: Let them know, based on the research completed, what functionality is needed. Ask them about technology requirements, and allow them to understand what customers want and how they want it.

How effective will sharing research and audience information be via email? Not very, I'd guess. Organize a lunchtime learning session to disseminate the information. Arrange individual presentations to key stakeholders to share the results in context to their own priorities and needs. Don't just email documents around; talk through them. This gives you the chance to explain why the research took place, how, what the outcomes are, and ultimately, what was learned about the audience.

From here, the information needs to be used in practical ways—whether by informing content goals, influencing information architectures and hierarchies, creating taxonomies, making service or product changes, or tweaking marketing messages.

The perpetual loop

Research is a team effort, and a big one. Once the initial results are in, disseminated, and then actioned, it doesn't end there. Customers' needs change; company culture and identity evolves; industries react. The research process should never end. It may be a bigger investment up-front, with smaller and less intense cycles thereafter, but ensure that your clients never stop asking questions about their customers and validating the information they already have.

Even if additional research reaffirms what they already understand, that's time well spent. They then know the information they are basing their decisions on is relevant and accurate. Chances are though, they'll learn something new and understand even more about the very people they are targeting. ■

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3 / Audience acquisition

Finding (and keeping) customers for your clients

NICOLA TAPPENDEN, BELLE-DIGITAL

Encouraging the clients we work with to drive long-term customers and not simply web traffic is essential to the success of their business, and your client relationship.

Before a merchant is advised to begin spending money on marketing for audience acquisition, they must start by better understanding their target audience.

There are many low-cost entries to get a brand's message in front of an audience, however we must first ensure it is the right audience. Listen to them, and customize how you deliver ads and content to them accordingly. After all, your client is after long-standing customers and not simply website visitors.

Who is your client's audience?

It all starts with the planning. Before encouraging any promotional spending to acquire or build an audience, research should be conducted to find out what the client's existing customer base looks like, and where lookalikes of these customers may be hanging out online. You can get a good sense of how to understand your client's audience in Rob Mill's chapter, User Research.

If the merchant has a low customer base, you should take a look at their competitor audiences. A few questions to find out about the brand before you embark on any audience acquisition include:

- Who already buys from them?
- What do they buy?
- Where are they geographically from?
- What interests do they have?
- Are they on social media? If so, who influences them?

Social media planning

This may sound slightly intrusive, but having a dipstick into key audience likes and influencer triggers may help us identify content trends, new products, and ultimately help us create content that will get the highly desired engagement, shares, and new audience base that our clients are after.

A good, low-cost place to begin is with social media insight. Many brands tend to look at "what" individuals tweet, but I encourage you to delve slightly deeper and help your clients understand more of what makes their desired audience tick.

> **PRO TIP:** What someone tweets gives us an indication into how they want to be perceived. However, who they follow on social media gives us a stronger insight into what really makes them engage online.

We will also be able to identify "where" our target audiences are talking and, therefore, where we should focus our promotional efforts:

Facebook? Blog comments? Twitter? Instagram?

The key benefits of this kind of planning include:

- Product promotion focus for the merchant
- Ideation and content planning
- Campaign messaging
- Media planning and long-tail keywords

Some of the best social media-listening platforms on the market that will help identify these key audience insights include tools such as Brandwatch and Sysomos, which merchants could deem a very expensive overhead.

There are free tools on the market such as SocialMention that can provide much more scaled down levels of insight around a brand, product, keyword, category, or person.

Another useful tool that will give you a better understanding of a client's customer base (and appropriate ad targeting and content creation strategies), is Demographics Pro. This software allows a user to analyze influence, and target customers that matter the most. This is done through the system interrogating a brand's audience, and looking at the content they engage with daily across social media—systematically breaking down demographic and psychographic data.

Tools like this allow analysis of the right audience, targeting customers that matter most to a brand through the content they truly wish to engage with, and not the content the merchant thinks they want to see.

Lookalike buckets

Once you've acquired these insights, you should create lookalike buckets to begin ad targeting in various channels. For example, you may wish to deliver a lead generation campaign for a merchant, and in doing so you may drive the majority of these email address leads away from competition and discount-focused websites.

You may therefore wish to create a new subscriber list in the merchant's email marketing tool called "Compers." We are now in a position to personalize biweekly or monthly email broadcasts with this audience, during times when the merchant may be having trouble moving particular merchandise. Siloing ensures that this type of communication is carried out away from the merchant's existing loyal customer base.

Another way of segmenting an audience bucket is to use social listening and profiling tools to identify that, for example, 50% of a competitor's social audience are within a specific age range, living in a particular area, listen to a particular music artist or genre, or follow a specific football team.

This insight is extremely powerful as trends like this will allow you to build audience targeting buckets within the likes of Facebook, Instagram, and Twitter ad platforms, targeting specific audience buckets accurately, and therefore helping improve conversion for the merchant.

Targeting the right audience

Email marketing

Driving an audience to a merchant's site just once isn't enough these days. Our content and ads have to remain sticky with as much analysis behind our audience acquisition strategy as possible. We need to keep them coming back, and a way to do this is through email marketing. Every time we help publish new, interesting, and shareable content via the merchant's blog, we should also be sending these posts out through existing email lists.

Continually optimizing mail lists through metrics such as open rates, shares, and click-through rates are key variables.

Social media

A client's existing customer base is its biggest and most powerful sales force. You should encourage fuelling this audience with useful and shareable product information or branded content. There is a greater chance of a happy customer sharing product information or branded content than someone new joining your merchant's audience.

The opportunity to turn existing customers into brand advocates is a valuable one. Alongside creating advocates in social media, pushing new audiences is key. Using our granular audience targeting from our social insight exercise, we are now able to identify key audience buckets through paid social advertising, or content promotion through most social channels.

Social media is very much a "pay to play" environment now. In order to get a merchant's most basic content seen by their existing audience, let alone a new audience, you typically have to pay for any eyeballs. This is why it's imperative that the insight piece is carried out initially, to ensure your client's marketing budget is being spent on the right audience segments.

PRO TIP: Ensure that you publish all shareable social content in one place (typically the blog), and use social media channels as "spokes". This way, the home of the content is always the merchant's site, offering a larger chance to sell or create a long-standing customer, as well as benefiting their SEO.

No lost conversions

Inbound marketing is the easiest traffic any merchant can get, but more times than not, it's the most difficult to retain and communicate with ever again. Converting the weekly traffic that would otherwise bounce soon adds up, and could be extremely effective for any ecommerce brand. Seventy-six percent of shopping carts are abandoned at the checkout stage, which is a huge drop off when spending so long driving such a targeted audience to the merchant's site. Abandoned cart recovery tools such as Ve Platform or Shopify's built-in tools allow a merchant's website to identify a potential customer with ease.

For example, if a user is travelling along the purchase journey, comes to the fulfilment form, types out their email address, but doesn't go any further, abandoned checkout tools allow you to capture the user's email to follow up and let them troubleshoot any problems they may have had on the site. This is also an opportunity to provide them with a discount code to encourage them to return and complete their purchase.

Measure, optimize, and improve

We must remember that growing a brand audience is a journey and not a destination. Audience acquisition campaigns involve a continual process that needs to evolve and adapt to new audience interests week over week, month over month, and year over year. The only way to appear relevant with re-occurring and new audiences is to constantly measure engagement and behaviour, and deliver ads and content accordingly.

You can assure your clients that while it may take time, with quality will come quantity. ■

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4 / Analytics

Becoming a strategic advisor on client data

ROSS BEYELER, GROWTH SPARK

As freelancers, we're all pursuing the Holy Grail of "repeat business". Many of us aim to build retainer relationships with our clients to help diversify and secure revenue streams. Building this additional revenue, however, is not about getting clients to purchase a certain number of billable hours per month. It's about finding ways to continue driving value for our clients. It's shifting from being reactive tactical executors to proactive strategic advisors. It's ceasing to explain project costs and starting to demonstrate project ROI. It's not a monthly dump of data via some spreadsheet, infographic, or PDF; it's about making informed recommendations that clients can pursue to grow their business.

So how do we, as designers, developers, and marketers, begin to master the world of analytics to shepherd our clients through growth? How do we incorporate the use of analytics into our service offerings to help drive repeat business? Answer: We shift our service offerings from *projects* (engagements that are cost-driven and stem from client requests) to *initiatives* (engagements that are ROI-driven and stem from our analytics insights).

In the world of ecommerce, I've found that these areas of analytics lead to the most opportunities for growth: business analytics, customer analytics, website analytics, and campaign analytics. In this chapter, I'll define each of these four areas and suggest a handful of analytics-supported initiatives that you should consider offering your clients.

1. Business analytics

Business analytics focus on measuring the overall performance of your client's business. This includes metrics that determine the company's health, growth, and opportunities for improvement. Potential initiatives you could pursue with your clients include:

Shifting from annual goals to daily Key Performance Indicators
Most businesses have some sort of lofty, long-term goal. Often it's a revenue target for the year. The challenge with long-term goal planning is that achieving these goals often seems distant and unattainable. To frame these goals and measure progress on a more incremental basis, use Key Performance Indicators (KPIs) to determine whether your client is "on track" for success.

One initiative worth considering is some sort of workshop with your client where you run through their annual goals and identify daily or weekly KPIs worth tracking. For example, let's say they want to add another $365,000 in revenue for the year. On a daily basis, that's only an additional $1,000 of revenue. If they had an average order value of $100, then their KPI is 10 new sales per day. You can then work with your client to build the necessary reporting tools to track this as seamlessly as possible. Then their entire decision-making process as a business can focus on hitting that daily KPI.

Integrating financial reporting with ecommerce
Of all the different types of data available, financial metrics are the most fundamental to understanding the health of any business. Tracking profitability, cash flow, and general financial trends should be the first priority in your analytics strategy.

Luckily for many ecommerce companies, most of the necessary data lives in their shopping cart platform, such as Shopify, and simply needs to be ported into their accounting platform, such as QuickBooks. Consider working with your client to install an app, or build an integration between their shopping cart and accounting system. In addition, ensure that proper tax reporting, with a platform such as Avalara, is either part of that integration or bolted on as well. That way, your client can monitor the pulse of their business's financial health in real-time.

Integrating inventory reporting with ecommerce
Effective inventory management is a huge profit driver. Beyond just tracking what's in stock and not in stock, it allows you to understand inventory turnover (i.e. how quickly things are sold), and use that data to accurately forecast what should be repurchased and what should be liquidated. Consider working with your client to install an app or build an integration between their shopping cart and an advanced inventory management system such as Stitch. Third-party platforms that specialize in inventory forecasting can help provide your clients vital insights into purchasing decisions. The benefit is often free cash from optimizing inventory investments and minimizing order delays for popular products.

2. Customer analytics

Customer analytics focus on measuring customer behaviour in relation to your client's brand. This includes building a deeper understanding of those customers and using that understanding to improve their overall experience. Potential initiatives you could pursue with your clients include:

Building a centralized customer hub
A customer hub is a platform your clients can use to build richer profiles of their customers. This platform would aggregate data from their shopping cart, email marketing platform, support platform, etc. to build a detailed picture for each individual customer. You can work

with your client to identify and integrate a potential customer hub, so they can begin building a better understanding of their customers. The benefit is their ability to tailor their marketing and products based on the deeper understanding they gain of their customers.

Segmenting customers to personalize marketing

Once your client has established a customer hub, they can begin analyzing customers across the board and identifying potential patterns or groups, otherwise known as segments. Segments include things such as "customers who have spent more than $1,000," "customers who have purchased in the last 30 days," "customers who live in Boston," etc. One initiative worth considering is some sort of workshop (or monthly meeting) with your client to analyze patterns and identify these segments. Once these segments are identified, you and your client can begin to personalize marketing and messaging. The benefit is improved overall marketing performance and a better experience for your client's customers.

Calculating gross profit per visitor

In an effort to simplify the multitude of metrics associated with customers (i.e. bounce rate, conversion rate, etc.), we often look at the gross profit per visitor (GP/V) as the leading metric for marketing performance analysis.

Put into a formula,

$$GP/V = \frac{(\text{Visitors} \times \text{Conversion Rate} \times \text{Average Order Size} \times \text{Profit Margin})}{\text{Visitors}}$$

Let's say your client averages 10,000 monthly visitors, with a 2 percent conversion rate, $100 order size, and a 60 percent gross margin. This results in $12,000 gross profit on a monthly basis, and a $1.20 GP/V. With this metric, you now know that you can spend up to $1.20 for each visitor and still make money. Help your clients track GP/V by configuring their Google Analytics to calculate this metric right within their dashboard. That way, your client will have a clear metric they can use when evaluating marketing investments that's easily attainable right through Google analytics.

3. Website analytics

Website analytics focus on measuring the performance of your client's website. This includes metrics that determine customer behavior during their visit to a website. Potential initiatives you could pursue with your clients include:

Configuring goal tracking for primary and secondary goals
The number one goal for all ecommerce companies is getting a customer to place an order. But as much as we all want that to happen, not all customers are ready to make a purchase when they visit a client's website. As such, we want to provide opportunities to get customers in our client's "marketing funnel" by getting them to subscribe to email newsletters or follow your client on social media. It's important to track both primary goals (i.e. product purchases) and secondary goals (i.e. email subscriptions, form completions, etc.), so our clients can measure effectiveness across all interactions with their customers. Once again, you can configure Google Analytics goal tracking for your client's primary sales (through the built-in ecommerce integration setting) and secondary marketing goals. Then, you and your client can determine marketing effectiveness even if the result is not an immediate end-purchase.

Configuring A/B testing to measure improvements
As professional designers, we often rely on our intuition when it comes to making design decisions. Unfortunately, clients don't always feel as confident as we do in our gut decisions. Luckily, we can utilize our new-found friend, Mr. Analytics, to help measure the effectiveness of design and content decisions.

Use an A/B testing platform, such as Optimizely, that will allow you to test the impact of a website change before rolling it out completely. The benefit is that we can utilize the data we capture to demonstrate to our clients which design decisions have worked and which need to be reconsidered. Be sure to read the next chapter, A/B testing, to learn more.

Configuring funnel and behavior analytics
Out of the box, Google Analytics can provide data on how visitors arrived at a website, how long they spent there, and whether they took any specific actions. And while these insights are helpful, they only give a "barbell" approach to understanding a customer's relationship with a website. In other words, they allow us to understand the beginning and the end, but not so much the middle, of the time a customer spends on the site. Although Google Analytics has introduced a number of advanced features to provide more insight on visitor behavior, tools such as MixPanel and UberSuggest will specifically track how visitors interact with a website. You can help your client configure one of these advanced analytics platforms and set up "funnel tracking," which will map out the exact journey customers take before making (or not making) a purchase. Then you and your client can identify what's really effective during the customer's journey, and use that understanding to drive design and content changes.

4. Campaign analytics

Campaign analytics focus on measuring the performance of your client's specific marketing campaigns or initiatives. This includes methods for determining effectiveness and profitability within each campaign. Potential initiatives you could pursue with your clients include:

Configuring UTM tracking to measure campaigns
Many companies use a channel-specific sales strategy. They isolate search engine optimization, paid advertising, social, etc. as separate means of engaging with potential customers. Although this approach certainly has value, a multi-channel strategy that's driven by a campaign is a great alternative. But rather than monitoring traffic by source, you'll want to analyze traffic by campaign.

Use UTM tags, provided by Google Analytics, to create a unified means of tracking a single marketing campaign across multiple channels. The benefit is a more holistic understanding of how a campaign-driven marketing strategy is performing.

Configuring an SEO analytics platform

Despite Google's ever-evolving algorithm and the ups-and-downs of search ranking caused by it, SEO still remains an anchor strategy for ecommerce customer acquisition. Any company that has invested in an SEO or content marketing strategy should heavily consider a more specialized analytics platform to specifically measure the growth in their search performance.

Platforms such as MOZ allow you to track changes in your ranking, keyword optimization opportunities, and content updates across your client's entire website. One initiative worth considering is working with your client to set up one of these platforms, and track changes month-to-month. The benefit is that they get a more real-time pulse on their SEO performance, and you get a deeper understanding of opportunities for content improvements.

Reporting effectiveness of promo-driven marketing

Ecommerce companies that use discount or promo codes in their marketing efforts need to ensure that the money spent is worthwhile, given that a discount is really a loss of revenue. Some basic reporting can determine which customers are utilizing promo codes and the impact it has on sales.

Consider working with your client to configure discount code utilization reports, often done directly inside their shopping cart platform, to measure performance. The benefit is increased insight into how promo codes are being used across the board, such as new versus repeat customers, certain product lines, etc.

It's tempting to do a job and be done. Finish the design. Push the code. We all like the feeling of completion and strive to have our to-do list checked off until we reach the mythical "zero". This sort of mindset works well for one-off, project-driven businesses where meeting specific budgets, timelines, and scopes equates to success. It's not as effective for driving repeat and retainer business from existing clients. By embracing analytics and stepping into the role of strategic advisor, you should be able to expand the value you provide your clients, and grow your own business in the process. ■

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5 / A/B testing

The ABCs of conversion optimization

RAY SYLVESTER, ROCKET CODE

Would you implement a financial plan without a goal in mind, or without the ability to measure its effectiveness over time? I hope not. So, why would you sell web UI/UX design services to your clients without understanding their Key Performance Indicators (KPIs) and how you're going to measure the effect your design changes have on them?

A/B (or multivariate) testing is the best way to do just that. This empirical approach to design is a great way to differentiate yourself from the crowd of others pitching run-of-the-mill redesigns. Through A/B testing, you can forge better, more strategic relationships with clients as you work together to refine and test hypotheses that contribute compounding value over time.

In this chapter, we're going to dig into the factors behind successful A/B testing—what we at Rocket Code call performance optimization design—and explain how to deploy it as a high-value strategic competency for your business.

The power of "why"

Approaching ecommerce design with performance optimization in mind first is a beautiful thing. Why? Because the impact of every interface change can be tested and measured. No change is too small or too big. Anything is possible.

Being successful with performance optimization design, however, may require an evolution in your thinking about design. The key is to be deliberate about the questions you ask your clients and yourself—and the way to foster this evolved thinking is to start with *why*:

- Why do you (or I) want to make this design change?
- What am I hoping to achieve from this design change?
- What's wrong with the current design?
- What can this new design paradigm do better than the current one?

When you take this approach with clients, you can help them evolve their thinking about design too—and that's when the real magic starts to happen.

While there are plenty of metrics that can be measured through A/B testing, the gold standard in ecommerce is revenue per visitor (RPV). It's *not* conversion rate, and it's *not* average order value. And definitely don't build your testing around "vanity" metrics like click-throughs or email signups. Cut through the noise, and focus on RPV.

Loading up your toolkit

You're changing the way your clients think about design, and positioning yourself as the expert—great. What's next? Pick a tool.

There are lots of tools to consider. At Rocket Code, we prefer Optimizely because it allows us to serve two masters: one, we can dive in deep with our UX and engineering teams; and two, it has tools we can put in the hands of our clients as we help them build a culture of testing within their own organization.

Once you've chosen a tool, it's time to get to work! In our experience, there are several key steps in the process. Each one is important, so no shortcuts.

Step 1: Investigate the user journey

Start by looking at the key steps in the user journey. We advise evaluating the following aspects of the ecommerce checkout flow and looking for ways to make things easier:

- Product detail page
- Collection template
- Cart
- Checkout
- Navigation

First, develop a comprehensive map of how a customer navigates the site, from initial page visit to successful checkout. From there, brainstorm ways to improve the journey and boost RPV. To stockpile ideas, you can draw on the client's analytics, usability testing, surveys, and user feedback, or simply your own (or your client's) instincts and insights.

Got a great map of the checkout flow, but short on testing ideas? Let's talk about a powerful methodology you can apply to identify testing possibilities.

Step 2: Reduce the attention ratio

In each area of the user journey, look for ways to reduce the attention ratio. This is the ratio of actions you want the user to take—usually just one—to the total number of actions they can take. Research has shown that the more distractions there are around you, the more each piece of stimulation competes for your attention. Ask yourself and your client, "How many interactive elements are hampering our customers from taking the one action we want them to take?"

By mapping out the checkout flow, then applying a lens of attention-ratio optimization, you should have a healthy slate of potential experiments to run. Once you've amassed this list, you might be excited to get testing. But you can't run 20 tests at once—and it's definitely not advisable to do so, even if you could.

You need to prioritize those opportunities, but how? Although it might seem daunting, next I'll outline a framework to do just that.

Step 3: Prioritize optimization experiments

Here's how we prioritize plausible performance optimization opportunities for our clients:

- First: high potential impact, low effort
- Next: high potential impact, high effort
- Last: low potential impact, low effort

Don't recommend any low-potential-impact, high-effort tests. Trust me—your clients will thank you for it.

Similarly, skip mundane testing options like button colors in isolation. Instead, advocate a testing program that considers whole ecommerce interactions—things like add-to-cart interactions, navigation paradigms, search treatments, and collection page filters.

We believe in data and suggest you start there to further inform your prioritization—namely, with your clients' web traffic data. Here are some specific analytics that we see as necessary starting points for effective prioritization:

- How many visitors see a given interface?
- How much better would that interface need to perform (in terms of RPV) to be valuable for the client?
- Do I think I can achieve that result through a new design paradigm?

By using analytics to inform your recommended design changes, you neutralize emotions and let math do the talking. If your logic makes sense and seems achievable, you're in a good position to earn the client's go-ahead.

Step 4: Design and run your experiment(s)

So, you've selected your first test based on the results of your prioritization exercise. The final step before actually running the thing is to establish appropriate parameters to ensure useful results. You know the old saying, "garbage in, garbage out"? Let's make sure that doesn't happen to you.

Good experimental design is paramount to successful performance optimization design. Here are some key considerations for your experiments:

- Don't change and test too many variables at once. This undermines your ability to achieve true statistical significance, without which you won't truly know which variant outperformed the rest.
- Without an adequate data sample, you're not going to get statistically significant results. Know how long you need to run the experiment to achieve statistical significance. We suggest running each experiment between seven and 15 days, and no longer than 20 days. Running the test for at least a week will let you capture any variance between weekdays and the weekend. The timeframe should be determined in large part by the site's traffic. Aim to get about 10,000 visitors through each experiment variant.
- Don't be tempted to "peek" at the data before the test has achieved statistical validity. Biases or expectations may tempt you to end a test before it's ready. Be strong.
- You also don't want to run a test for too long. Be prepared to stop the test once you've obtained enough samples. This way, your data's less likely to be affected by seasonal factors.

To simplify things, your testing tool of choice may be able to determine when statistical significance has been reached—let it do the heavy lifting.

Step 5: Measure and report your results

You've run your test, obtained enough data to get a statistically significant result, and found that your variant outperformed your control in terms of RPV. Great! But your analysis doesn't need to end there. Although RPV is the most important measure, you may learn more by looking at your results holistically and seeing how other metrics have shifted.

Segmentation can also be useful. Although overall results may not show a huge difference between variants, one might more noticeably outperform among certain segments of site visitors. These kinds of insights can help you devise solutions that drive more revenue among those segments, and give you ideas for future tests. Keep in mind, though, that the data within a segment also needs to have reached statistical significance or you can't trust the results.

Building a culture of testing

Being successful with performance optimization design means creating a culture of testing with your clients. You can do this by demonstrating the value of testing—being crystal clear about what you're going to test and why, and the specific potential gains from implementing a superior treatment. It's also crucial to get buy-in from across the client organization—this will ensure that everyone's on the same path.

The proposition is still elusively simple: Your clients will be more successful if they can make more money from each of their site visitors. By designing smart tests that identify opportunities to enhance revenue, and getting your clients on board with data-driven hypothesis testing as an alternative to gut-based or ego-driven solutions, you'll better set your clients—and yourself—up for success. ■

RAY SYLVESTER is a content specialist at Rocket Code, where they obsess about performance-driven interfaces, rock-solid engineering, and complete user experiences.

6 / SEO

Help clients improve their search rankings

JOSH HIGHLAND, NEWLEAF LABS

What is SEO?

That may seem like a ridiculous question to many. The first response is easy—*Search Engine Optimization*. The subsequent explanation, however, unlocks a world that many dabble with, some loathe, few embrace, and others try to cheat. As for you, I hope you'll add it to the list of services you can offer to your clients.

I like to think of SEO as a three-dimensional puzzle that requires each piece to fit together correctly for the entire website to function and rank at an optimal level.

SEO is the practice of getting a website's pages listed and ranked highly in search engine result pages.

Why SEO matters

On average, search engine users click a link on the first page of results 71.33 percent of the time. The top five results on the first page make up

67.60 percent of all clicks. Positions six through 10 account for only 3.73 percent of clicks. Links on pages two and three only get 5.59 percent of clicks. The other clicks are lost to advertisements, instant answers, and users refining their searches. These numbers vary year to year, but the impact is always the same—the top search results get the vast majority of click-through traffic.

Google does a great job of bringing relevant data to the top of its results. As users, we expect that the top search results will be just what we're looking for—and more often than not, they are.

Having a site that ranks highly in Google increases site visibility, which translates into more visits that have the potential to convert to sales. This should be an easy pitch to your clients. The goal of SEO is to rise in the ranks and capture top search engine result positions.

Getting started with SEO

KEYWORD RESEARCH

In order to start ranking better in search results, you need to have a set of target phrases that you want to rank for; these phrases are better known as "keywords." Search results are generated based on the keywords users search for, and ranking for the right keywords can make or break your website.

By researching your market's keyword trends, you can discover which terms you should utilize in your SEO efforts. Keyword research can also help you predict shifts in the market, as well as discover related terms that users are searching.

Finding keywords with Google Search Autocomplete
It all begins when a user types something into the search box, at which time Google tries to autocomplete the phrase you are entering. This feature is intended to help people save time. Luckily for us, it's also a handy way to do simple keyword research. The phrases that Google

suggests are popular search terms (keywords) that other people have searched for in the past.

A search for "Baseball Bat" autocompletes to the following:

- Baseball bats
- Baseball batting gloves
- Baseball bat display case
- Baseball batting cage

If your client was selling baseball bats, you can use the Google Autocomplete suggestions to your advantage and add these phrases into the content of their site. Google Autocomplete is a great way to find phrases or "long tail keywords" you may not have considered.

In-depth keyword research

In-depth keyword research is very valuable but can be daunting. Entire books have been written about finding the perfect SEO keywords for a site. I suggest that you spend some time researching the subject before making drastic changes to your client's site. Subscribing to advanced SEO tools like Ahrefs can help you discover the right keywords to target.

Free keyword research tools:

- Google Ads
- Google Trends
- UberSuggest
- LSIGraph

Keyword research resources:

- Shopify blog post on keyword research
- Moz keyword research articles
- Ahrefs guide for keyword research

- [Backlinko guide for keyword research]

TITLE TAGS

When it comes to SEO tuning, the title tag is one of the most important things to focus on. Search engines directly use the title tag in search engine result pages. The page title is the first thing about the site that users see in search results.

The title denotes what a page is about and is highly valued by search engines. Therefore, this is where you should place the most important keywords you are optimizing the page for.

Here is where the art of SEO comes into practice. You need to truthfully describe what the page is about, but at the same time, include the keywords that people would search for to find the page. To complicate things even further, it is recommended that you do this in 70 characters or less (and you thought Twitter was restrictive!).

Uniqueness is also an important factor for titles. If the site contains several pages with the same title, Google may have a hard time listing them properly. In some cases, Google will only keep the most popular page, and exclude the other pages with duplicate titles; something that you definitely do not want.

The title tag should:

- Be 70 characters or less
- Describe the content of the page
- Contain the primary keyword you are targeting
- Be unique per page

META DESCRIPTIONS

The description meta tag is another important on-page item that search engines look at closely when ranking a site. The meta description is not seen by users when they visit your site, however, search engines display the meta description on search result pages. In Google's case, the meta description is displayed below the title of the page.

Meta descriptions help search engines and users quickly understand what a page is about. The description is a brief explanation of what a user will find on that page and why it matters. This is where you sell the users on why they should click into the site.

Your description needs to be something compelling, truthful, unique, and containing the key phrases that people would use to find this page. You need to do this in 160 characters or less. Make sure you also include your primary keyword in the meta description.

CONTENT ISSUES TO AVOID

Duplicate content

Duplicate content is extremely harmful to SEO. Google and other search engines view duplicate content as "spammy," and it can lead to a site being devalued in search results. With Shopify, URLs are automatically generated for products and collections. If you have a product that exists in two collections, multiple URLs will be created for that product.

To avoid this, your theme needs to support "canonical URLs."
A canonical URL tells search engines to always use the URL listed in the code instead of the URL for the current page. This means that you can have 100 URLs show the same product, but Google will only see and index the one canonical URL that is defined in your site's theme.

You can determine if the theme supports canonical URLs by looking at the "theme.liquid" file in your theme bundle, and by locating the following code:

```
<link rel="canonical" href="{{ canonical_url }}">
```

If you are unable to find it, you can always type it in yourself. Add it anywhere between the <head> and </head> tags.

Copied content

If your client is selling a mass-market product like electronics, shoes, name brand clothing, or anything else that is not unique to their store, do not use the stock descriptions of the products. The odds are that someone else is already using the exact same content on their site.
If your client's site has the same content as another site that is already indexed, Google has no reason to add it to the search listings. Basically, if you do not take the time to create unique content for each site, do not expect to rank highly in search results.

IMAGE ALT TEXT

ALT data was first introduced to the web when people had slow internet connections, and it took a long time for images on webpages to load. ALT data allowed page authors to describe the image that was loading.

Now, image ALT text also helps Google better understand what your image is about. If you are selling baseball caps, you should update your product images' ALT data to reflect this.

Additionally, the ALT text should include information regarding the brand, color, and other characteristics that you want the product to be ranked for. Also, keywords that you have uncovered as having a high value to the brand should be included.

Speed matters

The world around us is changing; things are getting faster. Movies are on demand, car rides are a click away, and Amazon will deliver a package the same day you order it. As consumers, we are conditioned for immediate gratification. Recent studies have shown that 57 percent of visitors will abandon a page that takes three seconds or more to load. Amazon found that if their pages slow down by even one second, they lose $1.6 billion a year.

In the last few years, Google has actively awarded higher search positions to sites that load faster. If your client's site takes a long time to load, their chances of ranking on the first page of Google are limited, as are their chances of getting visitors to convert to customers.

SPEED TESTING

Google provides a great tool for checking the speed of a site: Google PageSpeed Insights.

Google PageSpeed Insights is free, and awards your site a score out of 100 possible points. The faster the site is, the higher it will score. Google grades the site from the perspective of a desktop computer and a mobile device. Google also provides suggestions on how to increase your score.

Getting a perfect score of 100 percent is very difficult to do. Aim for 70 percent or higher—Google will show your site's status in green when you are within an acceptable range.

COMMON AREAS FOR SPEED IMPROVEMENT

Image optimization
Images tend to make up the bulk of a page's weight, which is determined by the amount of data that needs to be downloaded to view the page. The 8MB photos that your camera takes are simply too large for most websites. Optimizing the images on a site can greatly improve its speed, and is highly recommended.

The simplest way to reduce your image file sizes while retaining quality is by processing them through an optimization service. There are several Shopify apps that plug directly into a store to compress your photos. If you prefer a more hands-on approach, there are websites that will optimize your images for free.

Shopify apps:

- Minifier
- Image Recycler

- Crush Pics

Free compression services:

- Compressor
- Kraken

JavaScript and CSS

For every JavaScript, stylesheet, or image a webpage uses, the web browser has to make a connection, download that file, then process it. The number of files that need to be downloaded (along with the size of those files) can dramatically decrease the speed of your client's site.

A simple way to speed up a site is to combine your script and stylesheet files into one large file. There are many tools online that will help you join and compress (minify) your style sheet and your JavaScript files.

Online CSS compression tools:

- CSS Minifier
- CSS Compressor

Online JS compression tools:

- JavaScript Minifier
- JavaScript/CSS/HTML Compressor

If you need to make any changes to your JavaScript or CSS, you need to go back through the combination and compression process. If you do this often, I suggest looking into development tools like Grunt, which can easily combine and compress files with little hassle.

Mobile matters

To be successful as a search engine, Google must provide the most relevant and useful links at the top of their search results pages. With more and more people searching via mobile devices, Google has naturally shifted toward giving preference to sites that provide a good experience for users on mobile devices.

Mobilegeddon
Mobilegeddon is the nickname given to the Google update that placed SEO value on mobile-enabled sites. Google started rolling out this change on April 21, 2015. Many top ranking sites without an acceptable mobile experience were penalized. The impact has been undeniable—having a site that is not optimized for mobile will hurt your search rankings. New sites that are not designed for mobile have little chance of highly ranking, or ranking at all.

Is your client's site mobile friendly?
The Google Mobile-Friendly Test is a free tool that checks the mobile readiness of a site. If your site fails, Google will tell you what areas need to be improved. It's important that your site passes all of the tests.
In most cases, switching to a mobile-ready theme is the easiest solution.

The future of search

As of January 2020, 79 percent of smartphone users have made a purchase online using their mobile device in the last six months. Simply put, more people are shopping on their phones and tablets than laptops and desktop computers. If your client's site does not easily accommodate mobile users, they're missing out on search rankings and sales to mobile-based users.

Speech recognition-based searches, along with predictive search suggestions, are already here and are becoming more popular every day. As our mobile devices become more embedded in our everyday lives, and as Google collects more information on our habits, search results will become more and more relevant. Mobile search is here to stay, along with mobile-centric SEO practices.

Implementation and execution

The aforementioned information outlines some of the basic steps that can be taken to improve your client's Search Engine visibility. It is in no way comprehensive. I recommend reading my book *Shopify Empire* to deepen your understanding of SEO as applied to Shopify.

That being said, subscribing to the The Ahrefs Blog and reading their introductory guide is also a great launching point for general SEO knowledge. The deeper you get into the SEO world, the more challenging and confusing it can become, which is why SEO professionals exist. Hopefully, this will help you on your way to becoming one.

Be wary of guaranteeing SEO results to your clients, as you simply can't—at least, not ethically. It can be enticing to game the system and get to the top of the rankings as quickly as possible by using black hat practices that may or may not work. Never do this—you will regret it, and it will eventually come back to haunt you.

Additionally, always remember that optimizing your client's store is not a one-time only solution; it's meant to be a best practice that is continued and implemented throughout the lifetime of your client's business—the perfect opportunity for a continued upsell. ■

JOSH HIGHLAND is an entrepreneur, app developer, and author from Redlands, California.

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7 / Content marketing

Creating compelling content that moves the needle for your client

SHAYLA PRICE, FREELANCER

With the increase in adoption of ecommerce stores, merchants feel the pressure to stand out in the marketplace. And one of the best ways to promote products and services is through content marketing.

The goal is to build your client's overall brand image. Full-stack content marketers possess a working knowledge of multiple disciplines, including growth strategy, content development, and social media.

Your content marketing skills will attract and engage your client's customers. The key is to transform their expertise into various written and visual content forms.

From my personal experience, I've learned that clients desire a clear content marketing strategy, coupled with unique content creation. But to be a full-stack content marketer, I also recommend offering results-driven promotion services with content maintenance.

Here's how to approach an ecommerce owner seeking content marketing support.

Content marketing strategy

Strategy is the backbone of great content marketing. It gives merchants the foundation to craft their personalized message.

You want to build a framework that not only delivers content, but also changes audience behavior. And it's not enough to tell your client, "Oh, we can do X." That won't help their ecommerce business. Rather, strive to set objectives, dictate metrics, and determine specific channels. Build a plan that lays out quarterly, monthly, and weekly tactics. Show merchants how the details fit into their long-term strategy.

Content audits

Some ecommerce stores don't know what type of content to include on their websites, or they don't know exactly which content works well.

Conduct a content audit for your client. Assess their content strengths and weaknesses. Give them a roadmap for future marketing activities. Start by creating a spreadsheet of all their content assets. Then, collect data points such as word count, number of social shares, and calls-to-action. The following resources can help:

- Google Analytics: Track page visits and bounce rates
- Screaming Frog: Export on-site SEO elements (page title, meta descriptions)
- Get Social: Measure social activity on your client's store

Analyze the data for trends; draw substantive conclusions that can offer your client a recommended course of action.

Editorial calendars

Sometimes, your clients may need assistance organizing their content. Realize that just assigning dates on a calendar isn't the objective. An effective editorial calendar strategically maps out content based on the audience, customer buying cycle, and the channel. In other words, distributing tweets to buyers at the consideration stage may not produce conversions.

Follow these tips:

- Consolidate all your client's content into one editorial calendar
- Add key dates, including product launches
- Correlate topics to create a monthly universal theme
- Post content at optimal times

Content creation

Relevant content doesn't begin when you write—it should start at the research phase. To unearth new topics, dive deep into your audience's mind.

Discover the reader's likes, pain points, and unanswered questions. Here are a few places you can look to for insight:

- Quora: Sift through questions pertaining to specific topics
- Sales team: Ask sales reps what customers love and fear about products
- Reviews: Read comments to dig up customer concerns

Your research should uncover the readers' preferences. What will spark their curiosity? How can you debunk their assumptions? Are you adding value or just producing more content noise? When researching, use a variety of sources. Websites, books, and magazines will spice up the monotony people usually expect.

The writing stage is all about creating compelling content that tells a story. People will stay engaged if they find your content easy to read and enjoyable. No one wants to feel like they are reading a dissertation. To combat boredom, experiment with different writing styles: conversational, humorous, or persuasive. And stay away from the 20-sentence paragraphs that could leave the reader lost. Aim for concise paragraphs that offer value quickly.

Break up text with visuals that add context to the story. So, insert funny gifs, infographics with statistics, or short video clips. That way, your ideas can transition smoothly.

In the editing process, seek to not only correct grammatical errors but also to add flavor to your content. That means crafting a new attention-getting headline, adding quotes from influencers, or uploading more images. Fuel your ideation with research, writing, and editing.

Content promotion

Promoting content is a major part of content marketing. Merchants want their content to reach as many people as possible. Paid promotion can be effective in grabbing a customer's attention. Facebook enables marketers to create social media ads that target specific audiences. For example, you can A/B test social ads that advertise to Boston football fans, or people who enjoy knitting.

Take the paid search route. Paid listings can direct traffic to premium content. Try this:

- Build your keyword list
- Decide whether to run an exact match or broad match
- Write actionable ad copy that's click-worthy
- Direct searchers to relevant content

As part of your content promotion package, gain earned media for your clients. This involves interacting with a community of influencers, including bloggers, subject matter experts, and industry leaders. Influencer outreach rests on developing relationships, not selling. Create a strategy that contributes to a particular ideal, instead of a brand name.

Here are a few tools to connect with influencers:

- Buzzsumo: Find experts in a specific niche
- Hunter.io: Helps locate email addresses
- Mailshake.com: Send customized emails and build outreach campaigns

Guest posting is another method to promote ecommerce businesses. Identify blogs that match your client's needs. Are they seeking to engage new audiences? Or do they desire backlinks? Once you define the goal, determine which blogs match the criteria. Then, read their editorial guidelines. If none exist, contact the blog manager. And remember, guest posting isn't centered around your client. The guest post must benefit the publisher, too. So, follow their rules and impress their readers.

Content maintenance

Content marketing is a continuous process. What's relevant today probably won't hold value tomorrow. Offer your clients content maintenance services that will keep their content ahead of the times.

Repurposing content is one solution. It gives your client the opportunity to transform one content asset into several formats. For instance, convert their topic-related blog posts into an ebook. The ebook can now serve as a lead magnet to boost email subscriptions.

If you have a pleasant voice, explore audio. Reinvigorate text by creating a podcast. Your client will connect with customers who may not have the time to read an article. Make sure you end with a call-to-action, like signing up for a newsletter.

Proactive social media engagement takes time. Support your client by spreading their brand personality across social networks. Be sure to define what social success looks like for your client: more followers, more interaction, or more traffic? Select two to three social platforms.

Then, chart a path to reach the measurable goal. For example, if your client wants more social interaction, manage their Twitter account. Retweet interesting tidbits, reply to followers' comments, and like tweets that align with the brand.

This kind of ongoing maintenance can help ensure your client's success, and can be a valuable revenue driver for you long after your initial contract is up.

Final thoughts

Content marketing is about more than just creating blog posts and videos. To be a better content marketer, it's important to diversify your content marketing services.

You can drive more results when you contribute to the whole content marketing machine, instead of one piece of the puzzle. So, offer your clients strategy sessions, social media outreach, and content repurposing. By doing that, you establish yourself as an expert in the field. And with expertise comes the opportunity to secure repeat business, possibly at higher rates. Market yourself by speaking at events, sharing useful content, and always bringing value to conversations.

Be bold. Be a full-stack content marketer. ■

SHAYLA PRICE has learned everything she needs to know in life from Jack Bauer. She's helped organizations with marketing, strategic planning, and professional development during her freelance career.

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8 / Videography

Unlocking the power of video marketing

MEGAN O'NEILL, ANIMOTO

Today, more than ever, brands and businesses understand the power of video. Video consumption is at an all-time high. Facebook reportedly receives over 8 billion video views per day, and audiences spend more than 1 billion hours watching YouTube videos per day. As a result, small businesses across all industries are embracing video.

As a freelancer or small agency, adding video marketing as an additional service to your arsenal has become increasingly easy with video builders such as Animoto. Luckily for your clients, video will help get their store and products in front of more eyeballs.

In the following sections, we'll take a look at the logistics of building a video strategy. But first—how do you convince your clients that they should pay you for video services? If the following stats won't convince them, nothing will:

- A joint study by Google and Ipsos Connect found that almost 50 percent of internet users look for videos related to a product or service before visiting a store

- Neil Patel reports that viewers are 64-85 percent more likely to buy after watching a product video
- According to a 2015 Animoto survey:
    - 4x as many consumers would rather watch a video about a product than read about it
    - 4 in 5 consumers say it's important to have a video showing how a product works
    - Nearly 75 percent of consumers believe a video that describes a service is important

Plain and simple: video drives customers down the sales funnel. Once your client is on board—and it shouldn't be too difficult to convince them—you're ready to get started with video.

Developing a video strategy for your client

Before you pick up a video camera, you'll want to sit down and develop a strategy. We'll break this process down into three easy-to-digest steps: determining your objectives, deciding what type of videos work best for these objectives, and coming up with a promotional plan.

DETERMINING YOUR OBJECTIVES

Make a list of your objectives for using video with your client. Odds are that you're interested in driving more conversions and sales, but these aren't the only benefits of video marketing. You may also be interested in one, or several, of the following:

- Increasing online engagement
- Increasing brand awareness
- Increasing website traffic
- Increasing customer education

DECIDING WHAT VIDEO TYPES FIT YOUR OBJECTIVES

Once you've determined your objectives, it's time to start thinking about the types of videos that work best for your purposes. We'll dive into the five most popular types of business videos and what works best for each.

Product videos

These videos show the ins and outs of a product or service, and are great not only for increasing sales, but also for increasing customer education. The more a customer learns from a product video, the better equipped they'll be to make a decision to buy.

About us / explainer videos

These videos serve to introduce your client's business as a whole. Including videos like this on a website will lead to higher placement in search results, and videos featuring the people behind the product also create a more trustworthy environment, specifically for online-only retailers.

Thought leadership & educational videos

Your client's industry experience likely means that they've got tips and advice to share. Creating videos around this expertise is a great way to increase brand awareness, nurture new leads, foster engagement and trust, and increase conversion—especially when you share this content via social media.

Customer testimonial videos

Speaking of trust, buyers love seeking out advice from their peers. Including customer testimonial videos from satisfied buyers is a good way to make future buyers feel more comfortable, which could lead to increased sales.

Promotional videos

Promotional videos can be used to let customers know about special deals, tease thought leadership content, promote events, and more. Ultimately, this type of video is helpful for generating buzz and driving sales.

Building a promotional plan

Once you've decided on which type of video(s) you'll be making, it's time to decide where to publish them. Do you want to post to your client's website or store? On their social profiles? If so, which ones? On YouTube? We'll dive into distribution in the next section.

DISTRIBUTING YOUR CLIENTS' VIDEOS FOR SUCCESS

No matter how amazing your videos are, nobody will see them if you don't post them in the right places and optimize them for sharing. Before we get into the where, let's take a quick look at video optimization.

Here are a few tips for optimizing your video content:

- Make sure videos play on mobile devices
- Add relevant metadata (such as titles, descriptions, and tags) to make your content discoverable in text search results
- Select a vibrant cover image that will make viewers want to watch
- Hook viewers in the first few seconds, and keep video content as short as possible—today's viewers have short attention spans

Once your video content is optimized and ready to go, it's time to distribute it. There are a variety of platforms to consider.

Website or ecommerce store

Your client's website or ecommerce store is a great place to feature About Us videos, product videos, customer testimonials, and any other video content that would be helpful for customers that are trying to decide whether or not to make a purchase.

PRO TIP: Make sure videos are easy to spot on the home page or on product pages. If they get buried in the design, customers may never notice them and will miss out on possible sales.

Social media and video sharing sites

Sharing videos on social platforms such as Facebook, Twitter, Instagram, and YouTube is a great way to drive engagement (not to mention YouTube's SEO benefits). Rather than straight-up sales videos, the type of content that does well on social platforms is content that entertains or educates, so stick to fun behind-the-scenes videos or videos showcasing your client's expertise.

> **PRO TIP:** Create different versions of videos for different platforms. For instance, on Facebook you may opt to use titles so that viewers can understand what's happening in your video as they scroll through the news feed without audio. For Instagram, you may decide to create a 15-second teaser.

Boost email with video

Did you know that, according to BombBomb, emails that contain video convert 68 percent more leads than traditional emails? While you can't actually play video in emails, including links to product videos about new offerings, or videos about promotions and events, is a great way to boost your open rates and conversions.

> **PRO TIP:** Try mentioning the video in your subject line, or linking out from an animated gif or image with a play button so that it's clear that your email contains a video.

Offline

There are also opportunities to showcase video content offline. If your client will be showcasing their products at a tradeshow, they can set up a television screen looping their video or, if they have a brick and mortar store, they may want to loop their video in the window to attract foot traffic.

PRO TIP: When videos are shown in loud places, it's important to make sure audio isn't necessary for viewers to understand what's happening. Avoid using customer testimonials or videos with talking heads, and if you must, make sure you include captions.

Measuring results

Once your videos are out in the wild, your job isn't done. You'll want to monitor their performance and see whether or not they're accomplishing the objectives you set for them. In the early days of online video, views were the be-all-end-all of measuring results but, in fact, there are many metrics that contribute to a successful video campaign beyond just views. Some of those include:

- **Engagement:** How many shares, likes, and comments is the video content getting?
- **Conversions:** How many viewers actually took action and made a purchase or signed up for a mailing list after watching a video?
- **Watch time:** How much of a video are people watching before they leave the page?
- **Click-through rates:** How many people are clicking on call-to-action buttons or links alongside the video?

The good news is that you've already got a number of tools at your disposal to help you measure the success of your video campaigns. Facebook Insights provides tons of information about the videos you upload and share (including views, watch time, social engagement, and more); YouTube analytics lets you take a deep dive into the performance of videos you've uploaded to YouTube; and Google Analytics can help you understand how much traffic your clients are getting as a result of your video marketing efforts. Plus, there are a number of other video hosting providers that can provide an additional layer of analytics for videos hosted on your client's website.

Seeing how certain videos are performing can help you adjust your strategy to get more bang for your client's buck going forward (and help you show your client that what you're doing is working).

Selling video as a service

Ready to start offering video as a service? We recommend starting with your best and worst critic—yourself. Create a series of videos for your agency or freelance business, including an About Us video that tells potential clients who you are; a video showcasing your marketing expertise; and a customer testimonial video if you've got a happy client that's up for helping out. You can use these videos to start building out a portfolio of your work that you can share with clients going forward.

Lastly, don't forget to add video to your list of services, your LinkedIn profile, your resume, and anywhere else you currently promote yourself.

Happy video making! ■

MEGAN O'NEILL is the Content Marketing Manager at Animoto, an online service that makes it easy for businesses to create powerful and professional videos.

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9 / Offline marketing

Creating brand experiences in the real world

MELISSA GONZALEZ, LIONESQUE GROUP

While being a freelancer may seem like the most genius idea you have had in years, it's also extremely competitive. Although this book focuses on ecommerce, one of the ways you can set yourself apart is by offering to help your clients in the physical world, with their offline marketing strategy.

Very little can replace the power of human interaction such as touching and feeling a product and delivering an experience. Delivering the right offline experience can allow your client to set themselves apart from the competition.

Not all offline activations will make sense for your client. You first want to remember that their brand is their identity. Every touchpoint should clearly communicate their unique value proposition—what makes them special; different; a must-have. Before deciding the right strategy, start with a few questions for your client:

- What does your brand (or company) stand for? What is the brand message?

- Describe your customer. Who are they? Who do they want to be? What are the barriers between these two states that I can help remove?
- Are there required elements that need to be worked in for your brand? Does your brand have established logos or service marks that need to be represented?
- What is the environment that best suits your brand message? Ultramodern? Traditional? Rustic?
- What action would you like every visitor to take? Share on social networks? Make a purchase? Join a mailing list?

Depending on their target market, you will need to develop marketing efforts accordingly. Being everywhere is time consuming, so identifying the best channels early on will be much more rewarding. Is their target B2B, B2C, or both? Below are four effective offline marketing channels, and the criteria, benefits, and strategy to keep in mind for each:

1. Trunk shows

A trunk show is an event in which designers or vendors present merchandise directly to customers at a physical space such as a standing retail location, a home, or a hotel room. In some cases, it's an exclusive event where an invite-only list can get preview access to a new line, or it may be a sample sale event discounting prototypes and imperfect cuts.

The right time: If your client has one collection or a limited offering and a small budget.

Benefit: A trunk show is a great solution if your client is looking to gain feedback from a controlled group. This is a very low-cost way to test the market.

Approach: Regardless of the activation, proper alignment is always critical. Determine if this is exclusive or open to the public. Have a marketing communications strategy, and use it as an opportunity for your client to engage one-on-one with customers.

2. Pop-in shop

Pop-in shops are like a "store within a store," where vendors rent retail space inside of an established retails store or boutique. Probably one of the most well-documented retailers using pop-in shops is Nordstrom.

The right time: A pop-in shop is a great way for your client to dip their toes into the brick-and-mortar retail world, with a minimal capital investment. If taking on an entire store alone seems insurmountable or if your client has yet to build a mailing list and social following, a pop-in makes sense.

Benefits: Leverage the existing foot traffic, awareness, and marketing muscle of the current retailer.

Approach: While it's not a full-on pop-up shop, a pop-in does call for a more branded experience than a trunk show. Do your research to be sure you are helping your client target locations that are on-brand, have similar target customers, and yet don't compete for wallet share. Invest time to curate the offering and add in little touches to your display that tell the brand's story.

3. Trade shows

A trade show is an industry-specific B2B exhibit or marketplace. For retail and apparel, some of the large shows include Magic, ENK, and MRket.

The right time: Although presenting at a trade show can seem exciting, they often involve a considerable investment including booth or space rental, design, build-out of displays, marketing collateral, and potential additional fees including electric, WiFi, and premier placement on the floor and in catalogues. Given the larger investment, your client should pursue this route only when they have a comprehensive collection to present and are ready to operate in the wholesale buying and logistics market.

Benefit: A trade show is an opportunity for your client to showcase their brand to new distribution channels. Most trade shows have a specific market or niche they focus on, which could put them in front of a very targeted audience.

Approach: Do your research and ensure you are guiding your client to present at the right show(s). Trade shows can create a lasting impression and new relationships if done well, but they are also costly, so ensuring you are being selective about where to present is imperative. Once the wheels are in motion, be sure to invest time to design a space with a clear point of view that draws attention. You should also consider a few promotional items (ones that are on-brand but may enhance their long day at the show) and perhaps a contest opportunity with giveaways in exchange for interaction. Sales collateral and email capture are also important.

4. Pop-up shop

A pop-up shop is a short-term retail location, ideally in a street-level storefront, where a brand or retailer can present their offering for an isolated period of time. A pop-up shop allows you to achieve multiple goals in a temporary setting. This is a relatively low-cost alternative to investing large sums of capital in order to sign multi-year leases and make other long-term commitments.

The right time: When your client has a clear goal, understands their target customer, and has a budget to cover rent, insurance, fixtures and build-out, staffing, and marketing.

Benefit: The benefits of a pop-up can vary with your client's actual goals. While sales are often one of the inherent benefits, others include brand awareness, testing new markets and/or demographics, collecting data, education, and beyond.

Approach: Here are some questions to ask when identifying the goals of your client's pop-up:

- Are you launching a new brand or category within an existing brand?
- Are you growing brand awareness for a specific product line?
- Are you testing a new market?

- Are you experimenting with what works and what doesn't?
- Are you educating customers?
- How will you immerse them in the lifestyle experience of your brand?
- Are you testing the launch of a new partnership or collaboration?
- Are you flushing out inventory with a sample sale?
- Are you leveraging a highly seasonal business?

The answers to these questions will inform you and your client as to what your strategy should be for your pop-up shop. They'll allow you to hone in on the overall purpose and what customers' expectations might be. By having clearly defined goals and expectations, you'll be able to focus on helping your client build out a true experience for your customers.

Understand how to assess a project

In the beginning, this will be a moving target, but the most important thing is to access each project and client along the way and continue to learn and adapt as needed. A checklist to consider:

- What will the project entail? Try to be as detailed as possible from the start. For example, when signing a new pop-up client, it's important for us to understand if they have a location or if we need to find one (as this tends to be one of the most time-consuming elements of the entire process).
- At what point in a client's process are you starting? Are they new? Do they have usable assets or is everything starting from scratch? Do they have past experiences you can learn from?
- How many people from your team will be needed to successfully complete the project, and how many hours will each person need to commit?

Be sure to keep client logs with hours worked, and be as detailed as possible about how time was spent on each project. Survey each client and ask for feedback so you can continue to grow and evolve.

Create cushion for negotiation in your proposal

Everyone likes to feel like they are getting a deal. While you want to begin at a professional point, always leave cushion for negotiation, especially if you really want to close the deal with a new client. Be conscious of the pros and cons of signing, know your room of negotiation ahead of the conversation, and if you are going to agree to a lower fee then how can you compensate for that in an intangible way? Can you add their logo to your website? Will they give a client testimonial?

Know your worth

Businesses that use freelancers are essentially paying for the convenience of having a plug-and-play expert, whom they don't have to train, pay for benefits, etc. They are likely saving money by having your services versus bringing in a team in-house to fulfill the task at hand. Some questions to ask to determine your rates:

- How competitive is your field?
- What are your competitors charging?
- How much experience do you have in your area of expertise?
- Are there additional benefits to working with this client (as described earlier)?
- Do a "temperature check" on the client. Are they organized? Will they be super high maintenance?

I believe that it's always better to charge on a project-by-project basis instead of an hourly rate, as it's often hard to determine the number of hours and most pre-estimates tend to be wrong.

Use client logs of past projects as a point of reference and a constant learning opportunity to better charge going forward.

As you continue to grow, learn, and evolve, remember to utilize your body of work to continue to grow your brand and eventually land the "bigger fish."

Ultimately, it's crucial that you maintain a clear perspective on your worth. While landing every project may seem enticing, being locked in with the wrong clients can have opportunity cost in hindering your growth strategy. Instead, use the time to write thought-leadership pieces or attend classes to sharpen your skills.

Remember: success is a journey, not a race! I hope this helps you to fuel the journey. ■

MELISSA GONZALEZ is the founder of the Lionesque Group, specializing in brand activation and pop-up retail experiences.

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10 / Working with Shopify

Why you should choose Shopify for your clients

THE SHOPIFY PARTNERS TEAM

As a digital freelancer, one of the many decisions you'll have to make is which commerce platform to suggest to your clients. It needs to be intuitive, extremely user-friendly, and flexible enough to meet your client's needs.

Enter Shopify, a commerce platform that lets entrepreneurs design, set up, and manage their store across multiple channels, including through an ecommerce website, social media, brick-and-mortar retail locations, and more. Shopify currently powers over 1 million businesses across 175 countries, and is trusted by brands like Unilever, Kylie Cosmetics, Allbirds, MVMT, and many more.

With thousands of integrations available in the Shopify App Store, your client can access the unique functionality they need to get set up. And with one back office for all their sales channels, managing their business is easier than ever.

As a freelancer working with commerce clients, you can also join the Shopify Partner Program. This vast and collaborative network of international designers, developers, marketers, and consultants use Shopify as the commerce tool of choice for their clients.

Becoming a Shopify Partner is free, and gives you access to:

- Development stores to test the platform and build your client's site
- Revenue share opportunities
- Developer preview environments
- Priority partner support
- Educational resources
- And more

Together, these opportunities have enabled thousands of Shopify Partners to learn from one another, and build successful and profitable businesses.

We hope you'll join us. ■

START YOUR JOURNEY TO BECOMING A SHOPIFY PARTNER TODAY

Shopify is the perfect solution for delighting your next commerce client, and our partner program is here to help you along the way. By becoming a Shopify Partner, you'll access exclusive resources that help you expand your business, as well as exciting revenue share opportunities. Join now to learn more.

THANK YOU

We can't thank enough the authors who contributed chapters to this book. Thank you for sharing your industry expertise with all of us, and for making the entrepreneurial path a little bit easier to tread.

To our readers, we hope you've found these insights valuable, and that you feel you're on the right track to becoming a full-stack freelancer.

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grow.
Vol. 2

Copy editing by Courtney Symons, Gillian Massel, Simon Heaton and Anastasia Philopoulos. Layout by Meghan Rosen.

This guide has been lovingly assembled to help you grow your freelance design or development company by building ecommerce websites for your clients.

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