Conversion Journey
Planning Workbook

Use this workbook to determine what your organization deems to be a conversion. Then, begin to identify the natural journeys and campaigns that will drive users along the buyer journey into conversion.

Section 1: What does your organization consider to be a conversion?

Traditionally a conversion is tied to ecommerce, but a conversion could be any activity that results in value to your organization. Check off the conversions that apply to you and enter any you don't see.

- ☐ Membership renewal
- ☐ Event purchase
- ☐ Donations
- ☐ Annual Conference
- ☐ Other:

- ☐ Membership join
- ☐ Download premium content
- ☐ Sponsorships
- ☐ Webinar sign up

[   ]   [   ]   [   ]

Section 2: Start to identify the web journey for each conversion.

Consider where the user is in their journey from awareness through to decision and give them values indicating their progress.

Example Journey:

Conversion	URL	Step	Value
Annual Conf Registration	www.site.com/annualconf	01 Main	20%
	www.site.com/agenda	02 Agenda	30%
	www.site.com/speakers	03 Speakers	50%
	www.site.com/rates	04 Rates	70%
	www.site.com/register	05 Register	90%
	www.site.com/thankyou	06 Thanks	100%
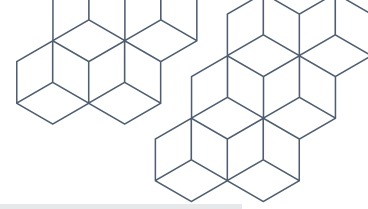
Conversion Journey 1:

Conversion	URL	Step	Value

Conversion Journey 2:

Conversion	URL	Step	Value

Conversion Journey 3:

Conversion	URL	Step	Value

Section 3: List out the types of campaigns you send to drive users to a stage in your conversion journey.

Do you have a series of newsletters going out that you use to include promotion of events? Do you have specific emails going out about renewing membership? Is there a separate set of emails going out about the annual conference that drives users to the conference microsite?

Section 4: What web domains might you want to track other than your main site?

Think through any instances where the journey veers onto a learning management system, an event management system, or even an annual conference microsite.

- [ ] Main Domain
- [ ] Event Management System hosted page
- [ ] Microsite

- [ ] AMS hosted page
- [ ] Learning Management System hosted page
- [ ] Other:

Section 5: Assign a dollar value to an email click.

Attribution is the process of identifying a set of user interactions across channels and touchpoints that contribute in some manner to a desired outcome, and then assigning value to each of these interactions.

Review reporting after you send your email campaign driving the user to your goal. What are you tracking today? If you are already tracking conversions, input your data here.

Campaign Name:

(Number of desired outcomes x Dollars earned) = ROI:

25% complete:

50% complete:

75% complete

Section 6: Write out a statement based on the campaign results.

Example statement: A single conversion is worth $1000 and the steps to convert cover 4 web pages. We drove 2 people out of 10 people total or 20% of our audience to the second page in the journey (50% of the way to conversion) and earned a total of $2,000 from two complete journeys.