

AN EXPERIMENT WITH CONTENT & UX

Increasing Landing Page Conversion

I was given the opportunity to lead an initiative for the Launch That Financial team. The goal of this project was to increase the conversion rate of Annuity.org, by gaining leads for the Annuity Primary business line. The task involved creating a new marketing campaign, involving an A/B test between two different landing pages.

Key Findings

- Learned the value of testing content within UX design
- Created design-driven process to propose and test new landing pages
- Tested new content format that proved to be effective with users
- Increased the primary market conversion rate by 4%

Role

Designer & Leader/Facilitator

Teams Involved

Design, Development, Marketing

What Makes an Effective Funnel for our User?

This initiative provided me with a decent amount of freedom, both creatively and strategically. Since there are so many possibilities in terms of what new CTAs and landing pages could be designed, I had to spend time researching and understanding what made a funnel effective. I also had to determine what values would ultimately drive these new ideas. During this phase, the goal was to determine what possible ideas could work for this project.

1

CUSTOMER CENTRIC

Our strategies have typically been driven by our business lines, and not necessarily our customers. We need to use our sites to show users why they should consider our products, and how it could benefit them and their families in the future.

2

PERSONALIZED

With the upcoming creation of more tooling, and use of Google Optimize on our sites, we should be able to provide more customized content to our users and give them a proper visual of how their money could grow in the future.

3

ACTIONABLE

While it's essential to offer high quality content to users looking for answers to specific questions, we want to encourage them to take action themselves and use our CTAs to point them in the right direction, by using language that is suited to them.

My Knowledge Gaps

As I began planning for the project, I realized I needed to learn more about various aspects of the business and my company.

Marketing Questions I Sought Answers For

- What are the keywords that AN currently ranks highest for?
- What is the process for figuring out which keywords to target?
- What conversion methods have worked best so far?
- Do certain pages or funnels produce more/less MQLs/SQLs than others?
- Which pages have the greatest potential to convert better in the future?

BUSINESS

I learned more about our financial brand's business lines, and the company's partnerships to see if there was any information they could provide to help us better target our customers. Our partner did a training session to review our ideal customers, and the process for turning leads into deals. I learned a lot of information about our business by doing more in depth reading of our site's content.

MARKETING

I became well versed on our KPIs, and learned of marketing strategies and campaigns that were used in the past and why they weren't as effective. To learn more about the marketing team, I set up a meeting with our marketing manager to ask her questions I had about the team.

PROJECT COORDINATION

I sought out any existing documentation that could help with planning and coordinating this project, and found that we needed better documentation for this process.

What were previous landers missing?

Trust Signals

Accreditations, awards, customers served, reputation, etc.

Testimonials

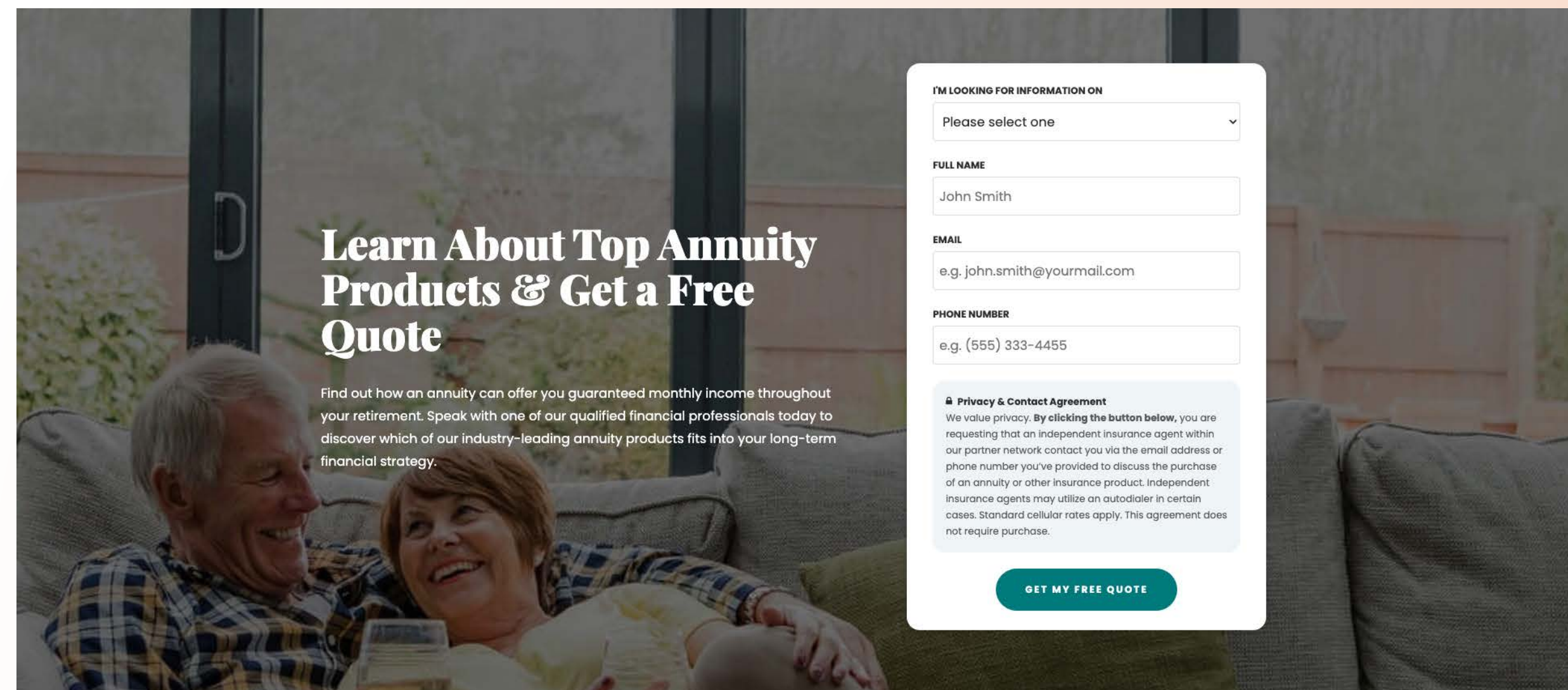
Reviews of positive experiences from customers

User Proposition Value

Emphasis on how purchasing an annuity product could benefit someone




Transparency

Helping users understand our partner relationships



Why Buy an Annuity?

Annuities are a safe and reliable investment. They can transform your savings into a more predictable income.

-  Get premium protection
-  Receive guaranteed income for life
-  Afford long-term care
-  Leave a legacy for generations
-  Fund your retirement

Types of Annuities



Fixed Annuity

Get peace of mind with a fixed annuity. These low-risk products offer a guaranteed, fixed rate of interest and tax deferral of your retirement savings.



Variable Annuity

If you're interested in an annuity that offers growth potential and lifetime income, a variable annuity may be right for you.



Fixed Indexed Annuity

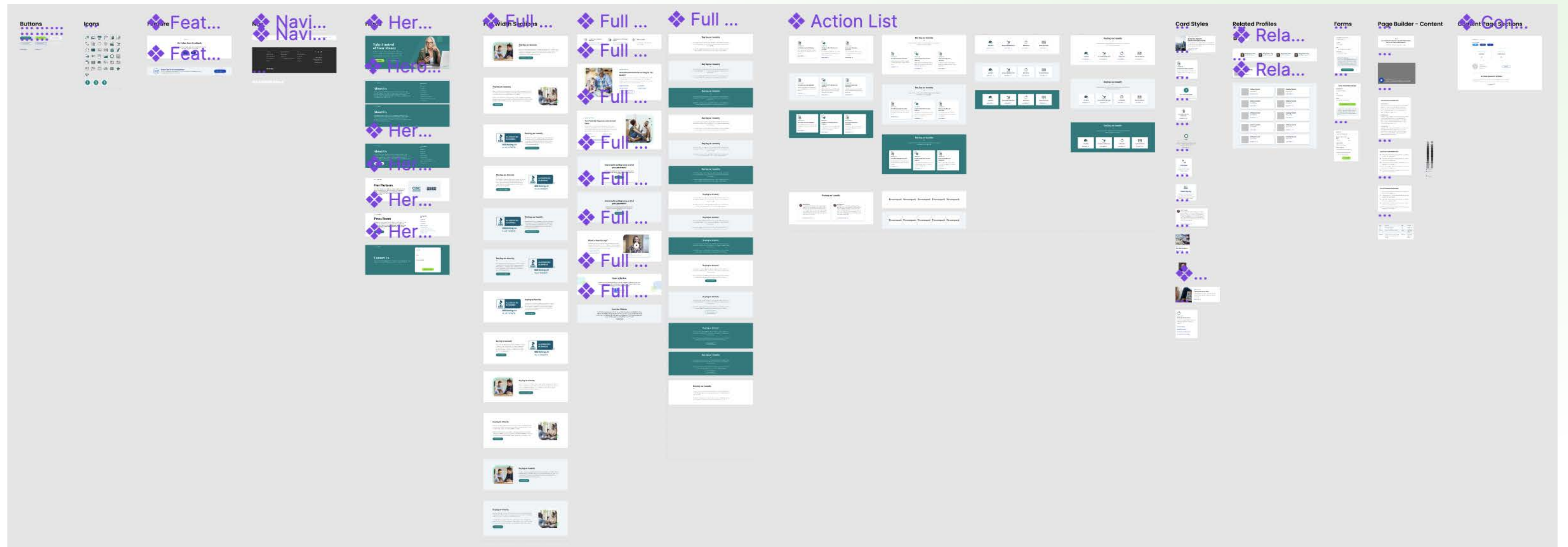
Fixed indexed annuities offer growth opportunities while providing protection against market downturns.

How the Process Works

VISUAL DESIGN

Design System + Components

ARES is the master design system that supports our sites. Prior to this project, I dedicated time to document and build design system components in Figma, focusing on the Annuity.org brand at the time. This process made iterating, prototyping and handing off assets to development much quicker.



Design system components and sections created in Figma

VISUAL DESIGN

Section + Lander Iterations

To begin designing early concepts for these landing pages, I utilized existing blocks from this component library, and created different design modifications to see how I could stretch our existing page builder to develop these pages.

I also wanted to make sure the hand-off to development was a smooth process, and making minimal modifications to our design system ensured this. Very little custom CSS was required for this project.

Why Should You Purchase an Annuity?



Premium Protection

You will always walk away with your purchase payment no matter what.



Income for Life

Many annuities provide the annuitant a stream of guaranteed retirement income for his or her entire life.



Legacy

Death benefit riders can allow you to pass on your annuity to one or more named beneficiaries when you die.



Long Term Care

Long-term care riders provide a level of insurance against the expenses of long-term care should you need it.

Who Can Benefit from Annuities?



People in High Tax Brackets

Description how this particular person/people can benefit from purchasing an annuity



Women

Description how this particular person/people can benefit from purchasing an annuity



Middle Class Couples in their 50's

Description how this particular person/people can benefit from purchasing an annuity



Financial Advisers

Description how this particular person/people can benefit from purchasing an annuity

Steps to Purchasing an Annuity

1

Assess your current and future financial needs.

Enlist the help of a professional, if necessary, and look for useful retirement planning questionnaires online.

2

Choose an annuity product based on your objectives.

Consider your financial goals — income or growth, for example — and carefully review the contract terms for alignment with your objectives.

3

Select your provider.

Refer to financial rating agencies, such as Moody's and Standard & Poor's, to get recent ratings on annuity providers.

4

Complete the application.

Fill out the application completely and accurately to lock in your rate.

5

Transfer the funds.

You can pay with cash, retirement funds or a transfer from a brokerage account. Make sure you understand the tax implications of your payment type.

6

Take advantage of the free look period.

Most insurance companies give buyers a period of 10 to 30 days from the contract start date to reject the annuity and receive a refund.

Immediate Annuity Calculator

If you're ready to take advantage of the lifetime-income guarantee that an annuity provides, simply enter your data into our immediate annuity calculator to get an estimated monthly income.

- ✓ Secure a guaranteed income stream for life.
- ✓ Receive protection against losing your premium.
- ✓ Find peace of mind with long-term stability.
- ✓ Guard against outliving your money.

Ready to Buy? Call: 866-841-4424

Enter Your Information

PREMIUM AMOUNT

Premium in Dollars

AGE

Age in Years

GENDER

Please Select Your Gender

CALCULATE MONTHLY INCOME

*The dollar amount from this calculator is an estimate based on user-entered data. This estimate does not constitute a binding agreement between you and Annuity.org or its partners. We strongly urge you to consult with a financial advisor before purchasing an annuity.

What is an Annuity?

An annuity is an insurance product designed to provide consumers with guaranteed income for life.

More specifically, an annuity contract is a legally binding, written agreement between you and the insurance company that issues the contract. This contract transfers your longevity risk — the risk of you outliving your savings — to the insurance company. In exchange, you pay premiums as outlined in the contract.



Retirement Gap — a difference between what people are currently saving and what they should be saving.

Types of Annuities



Fixed

GUARANTEED INCOME

Fixed annuities come with a guaranteed, set interest rate that doesn't vary beyond the terms of the contract.

Benefits:

- ✓ Present interest
- ✓ Low Risk
- ✓ Predictable Reward
- ✓ Predictable Reward
- ✓ Predictable Reward

LEARN MORE →



Variable

FLEXIBLE INCOME

Fixed annuities come with a guaranteed, set interest rate that doesn't vary beyond the terms of the contract.

Benefits:

- ✓ Interest tied to investment portfolio
- ✓ High Risk
- ✓ Potentially Higher Reward
- ✓ Predictable Reward
- ✓ Predictable Reward

LEARN MORE →



Fixed Indexed

GROWTH POTENTIAL

Fixed annuities come with a guaranteed, set interest rate that doesn't vary beyond the terms of the contract.

Benefits:

- ✓ Present minimum interest
- ✓ Medium Risk
- ✓ Predictable Reward
- ✓ Predictable Reward
- ✓ Predictable Reward

LEARN MORE →

GET MY FREE QUOTE

Why Should You Purchase an Annuity?

Let Our Financial Experts Help You Find the Right Annuity

Whether you're considering buying an annuity to guarantee lifetime income or selling your payments at a fair price, our experts can explain your options and walk you through the process so you feel confident in your decision.

7+ YEARS AS A FINANCIAL RESOURCE
We've educated people about financial options since 2013.

THOUSANDS OF CUSTOMERS HELPED
We've helped 5,000+ people find financial freedom.

BBB: A+ RATING
We have an A+ Better Business Bureau rating.

We Have The Tools To Help You

Take advantage of our partner's multiple resources and get started on achieving your financial goals.



Income Architech

An all-in-one planning tool that seamlessly combines:

- Income
- Cash-flow Analysis
- Harvest Patterns
- Taxes



Total Social Security

Software that builds Social Security planning into your practice. Includes:

- Visual Reports
- Claiming Strategy Options
- Break-even Charts
- Income Gap Charts



SmartRisk

Help clients achieve better retirement outcomes through better risk analysis. Includes:

- Asset interaction analysis
- Determines risk tolerance of portfolio
- Helps prepare you for down markets
- Retain clients during down markets

About Our Trusted Partner

Annuity.org has a partnership with Senior Market Sales (SMS), a full-service insurance marketing organization based in Omaha, Nebraska.

SMS has helped clients find insurance solutions nationwide since 1985. The company carries an A+ rating with the Better Business Bureau and is involved with several national trade associations, including the National Association of Health Underwriters and the National Association for Fixed Annuities.



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The Tools To Help You

Partner's multiple resources and get started on achieving your financial goals.



Total Social Security

It builds Social Security planning into your practice. Includes:

- Reports
- Claiming Strategy Options
- Even Charts
- Gap Charts



SmartRisk

Help clients achieve better retirement outcomes through better risk analysis. Includes:

- Asset interaction analysis
- Determines risk tolerance of portfolio
- Helps prepare you for down markets
- Retain clients during down markets



Testimonials



David Gaynes

"I called them with only the most guarded hopes. Because every conversation that I had had with my annuity company and other funding companies always concluded with 'sorry I can't do anything for you.' I was thrilled to discover that there was (an) organization that retained a sense of human caring and human involvement."

[READ DAVID'S STORY](#)

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THE SOLUTION

Lander Design: A Trust Campaign

After gathering insights from marketing, design and research, I determined the campaign we were creating needed to be geared toward building trust with our users. To reach our goal, I proposed the following changes:

Targeted H1 and Hummingbird Copy

The copy needed to emphasize how our services could assist our users. We later decided to test dynamic copy for different users.

Adding a Trust Bar

This section demonstrates our brand's credibility and expertise in the financial industry.

Highlighting Partners + Resources

The goal was to bring transparency to our users regarding the our partnerships and the annuity purchasing process.

Featuring Customer Testimonials

Users value the opinions of others on services and products, so providing positive reviews gives more context on the experience.

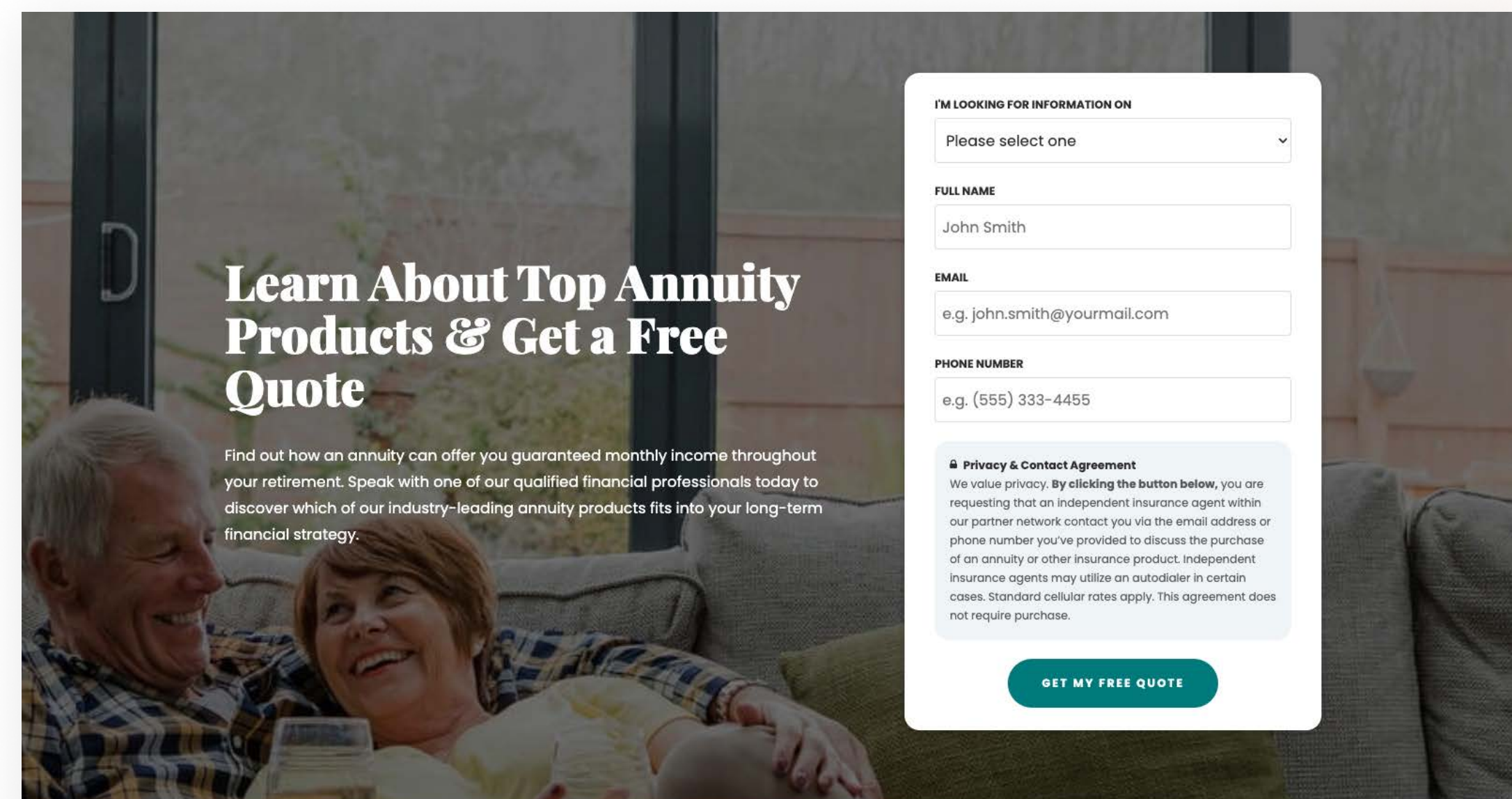
A/B TESTING

Original vs. Variant Lander

In order to test the effectiveness of this lander, I suggested we conduct an A/B test against the existing /purchase-annuity/ lander since it was our main lander for the annuity primary business line. We conducted a split URL test, so that when visitors click on primary market CTAs, half of the traffic would be directed to /let-our-experts-help-you/ and the other half would go to /purchase-annuity/. This test was ran for 6 weeks, using Google Analytics to track the results.

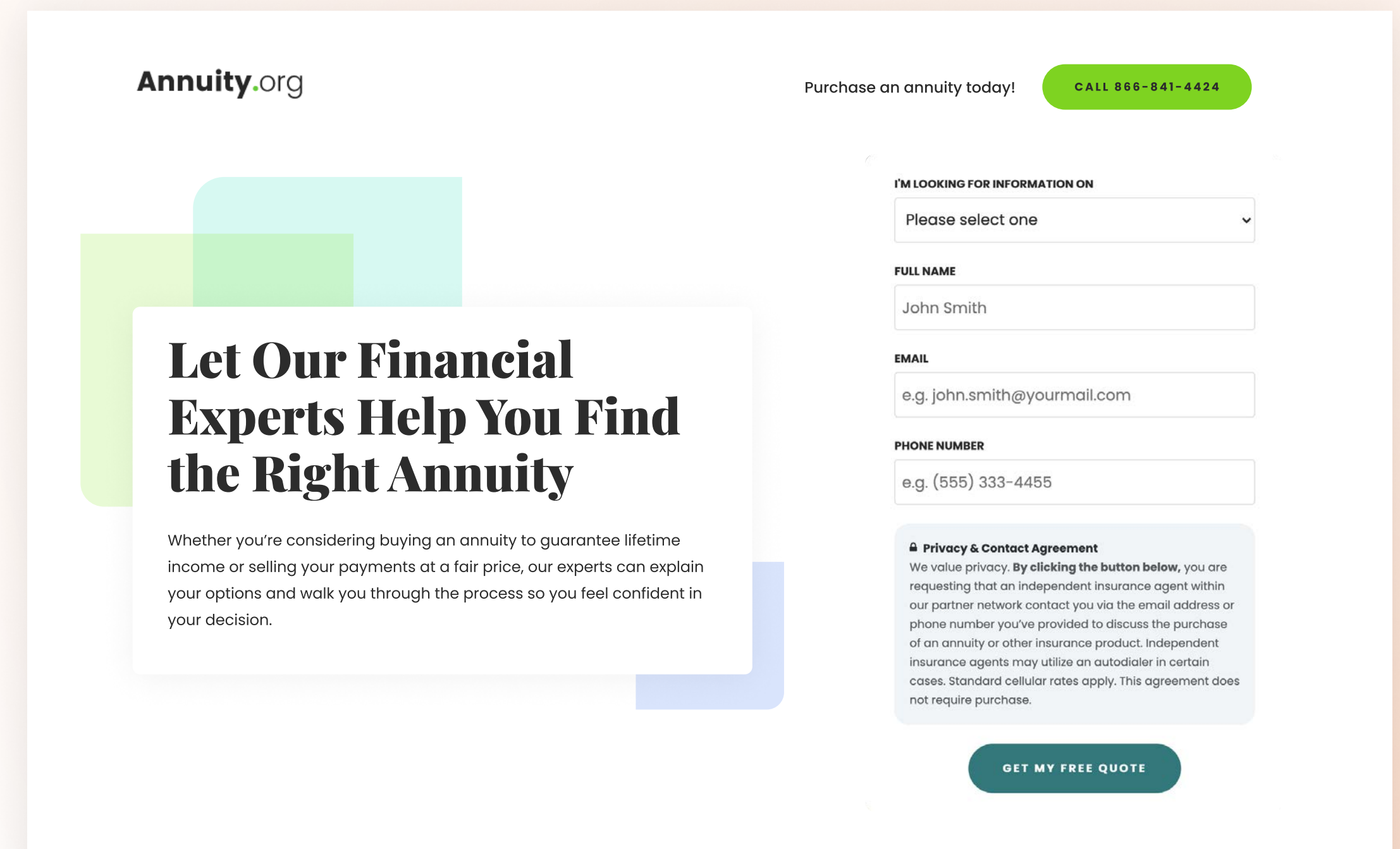
Original Lander

50% OF TRAFFIC TO /PURCHASE-ANNUITY/



Variant Lander

50% OF TRAFFIC TO /LET-OUR-EXPERTS-HELP-YOU/



A/B TEST RESULTS

What Did We Find?

Original Lander

Variant Lander

WEEK 1

10.0%

~50% of traffic

12.02%

~50% of traffic

WEEK 3

5.56%

~50% of traffic

6.38%

~50% of traffic

WEEK 6

4.85%

~50% of traffic

5.24%

~50% of traffic

+.39%

CONVERSION RATE

There was an overall .39% increase in conversion rate for the variant lander. I had hypothesized that if we focused on the value our financial products bring to our users, and emphasize our expertise while providing transparency, that would result in increased conversion rate.

Annuity.org CALL 855-747-1549

Beat the bank with fixed annuity rates as high as 2.95%

Talk to one of our qualified financial professionals today to find out:

- What a multi-year guaranteed annuity is and how it can offer you a rate higher than a certificate of deposit
- The best products from some of the highest-rated insurance carriers on the market
- How an annuity fits into your overall retirement strategy

Step 1 Step 2

WHAT INFORMATION ARE YOU LOOKING FOR?

Please select an option

HOW MUCH ARE YOU LOOKING TO INVEST INTO AN ANNUITY OR ANOTHER FINANCIAL PRODUCT? Ⓢ

\$ 100000

WHAT IS YOUR HOUSEHOLD INCOME ANNUALLY?

Please select an option

NEXT STEP

8+ Years as a Financial Resource
We've educated people about financial options since 2013.

Thousands of Customers Helped
We've helped 5,000+ people find financial freedom.

BBB: A+ Rating
We have an A+ Better Business Bureau rating.

The Company We Keep

Our independent agents work with some of the most trusted insurance companies in the industry to find you the best product that fits your retirement goals and objectives.

GET MY FREE QUOTE

Our Three-Step Process

- Contact Us**
We'll route you to a financial expert who specializes in annuities and retirement planning.
- Get a Free Consultation**
Our trusted network of advisors will listen to you and help you select the best annuity product based on your goals and objectives.
- Get Guaranteed Income for Life**
Get peace of mind knowing you've made a smart financial decision by securing a reliable guaranteed income for your golden years.

GET MY FREE QUOTE

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NEXT STEP

TESTING CONTENT FORMAT

Optimizing Landers for Mobile Experience

After seeing the success rate of the first A/B lander test, we decided to continue testing lander variations. For this next test, we wanted to make improvements to the mobile experience by:

Reformatting the Hummingbird Copy

Instead of having a long paragraph explanation, I worked with copywriters to create a new bulleted format for the hummingbird. This quickly delivers key points to users.

Increasing Form Visibility

Reworking the hummingbird copy and making changes to spacing allowed the form to become more visible on mobile.

Improved Type Alignment

The goal was to bring transparency to our users regarding the our partnerships and the annuity purchasing process.

THE RESULTS

Did the content format improve the conversion rate?

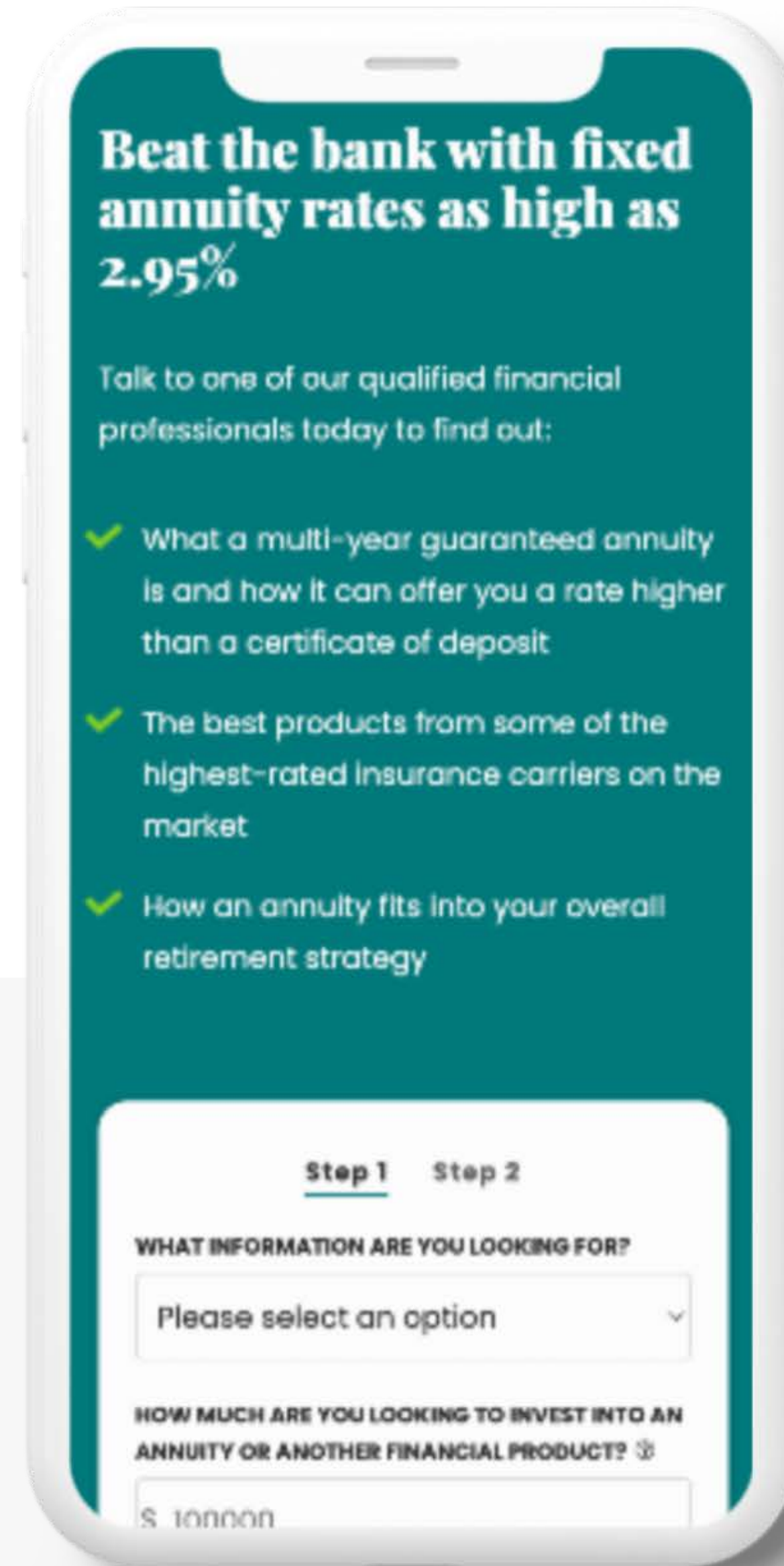
We conducted this test over 6 weeks, and found that for each lander we applied the changes to, leads increased for each lander.

+30% leads

LANDER 1: PURCHASE ANNUITY

+41% leads

LANDER 2: RATES



Takeaways

This project resulted in a valuable learning experience for the team. We've established a much quicker and efficient landing page creation process, which has allowed the team to test more ideas in a shorter amount of time. The following areas highlighted the success of the project:

1

PROVIDING VALUE TO USERS

We took time to evaluate how we could actually provide value to our users outside of just selling them a financial product. Personalized landers with dynamic content targeted toward users were an important part of this.

2

DESIGN-LED PROCESS

As a designer, I learned to use my knowledge gained from working in a cross-team environment to my advantage. By combining my knowledge of copywriting and our marketing strategies, I was able to lead this initiative through design.

3

ESTABLISHING STANDARDS

My proposed lander design process instilled the team's trust in designers to create and propose potential conversion ideas. Due to the success of our initial tests, the team is more open to testing lander variants and leaning on designers for ideas.