

A decorative graphic on the left side of the slide consisting of a grid of white-outlined hexagons arranged in a staggered pattern.

Adestra Conversion Capture Configuration & Consultation

A decorative graphic on the right side of the slide consisting of a grid of white-outlined hexagons arranged in a staggered pattern, similar to the one on the left but positioned lower and to the right.

Agenda

1. Conversion Capture overview
2. Our process
3. Set-Up & Configuration Steps
4. Exercise



1

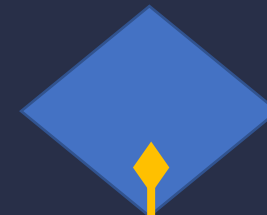
Conversion Capture Overview





What is a conversion?

- Transaction-based
- Action-based
- Ecommerce component
- Payment-driven
- Any activity that results in measurable value to your organization



A member, customer, or prospect **taking action** on your goal.






What is conversion capture?



Conversion Capture

is when a customer, member, or prospect *doesn't* take the desired action by finishing checking out. This triggers the shopping cart abandonment email to go out.

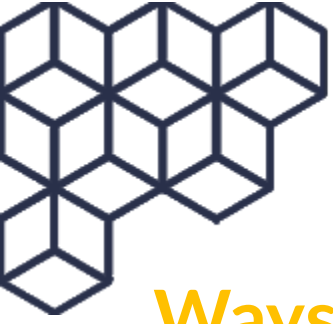




Shopping Cart Abandonment Trigger examples:

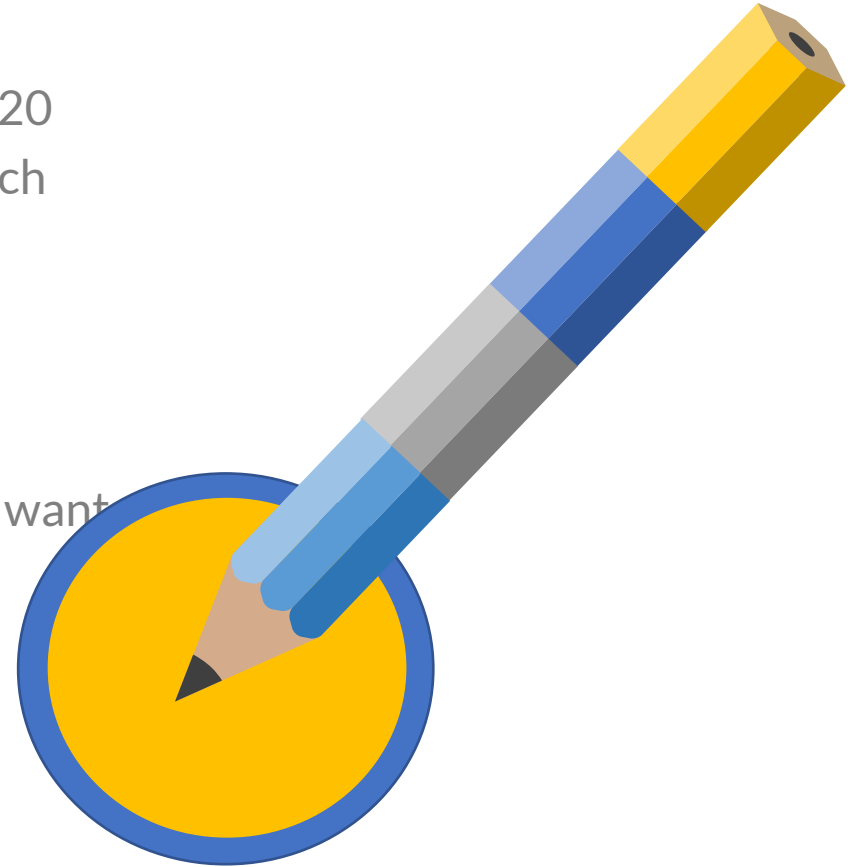
- Product sat in cart for 2 hours with no purchase
- No registration form completion after 1 day
- No member application completion after 2 days
- Survey abandoned with no completion





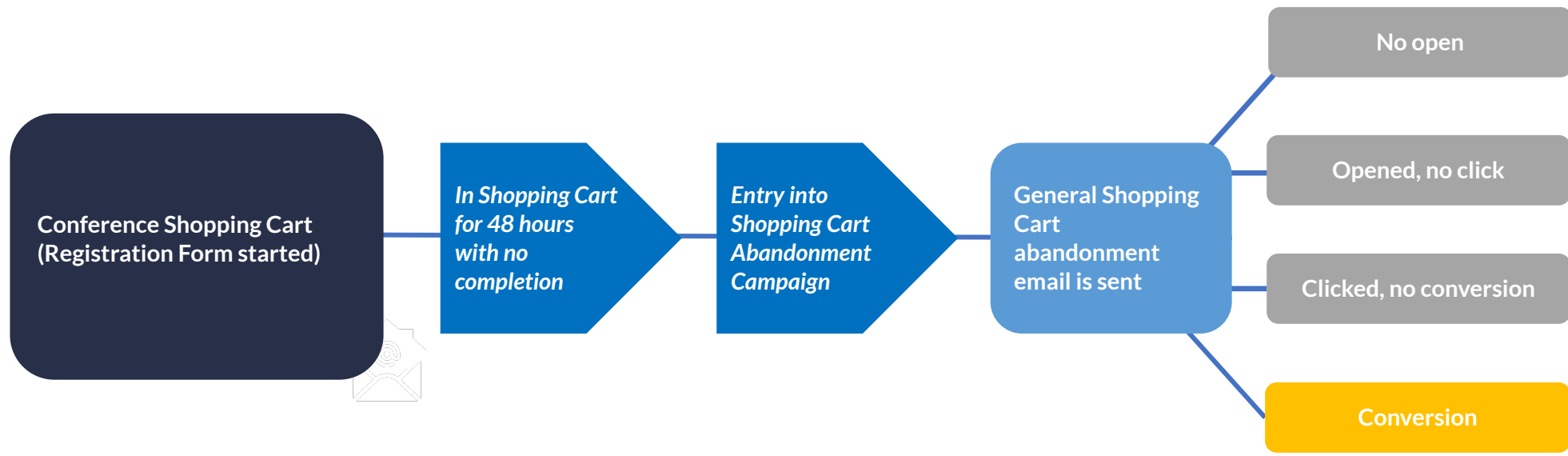
Ways to use the Cart Capture Data

- Product recommendation scenario: Because you bought the 2020 Research Report, we thought you'd like to buy our 2021 Research Report.
- Automation program scenario: Because you received my cart abandonment email and then opened/or clicked that message, I want to put you into my conference promotional program





Shopping Cart Abandonment Footprint





Tracker vs. Capture

Tracker

- Customer took an action
- Originates from an email
- Valuable for Attribution & Analytics
- Further automation is required



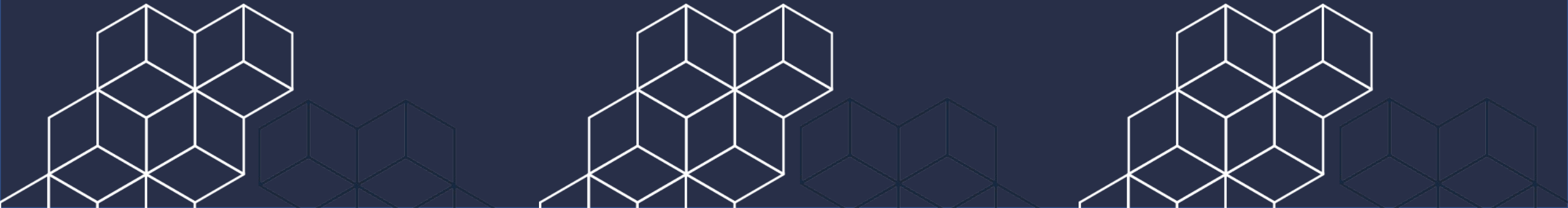
Capture

- Customer didn't take an action
- Originates from outside email
- Valuable for recovering abandoned carts
- Triggers timely, personalized emails when a customer fails to check out



2

Our process



What HRS will do

- Activate Conversion Capture in workspace
- Develop web code based on requirements collected
- Provide training and support on Conversion Capture and Reporting

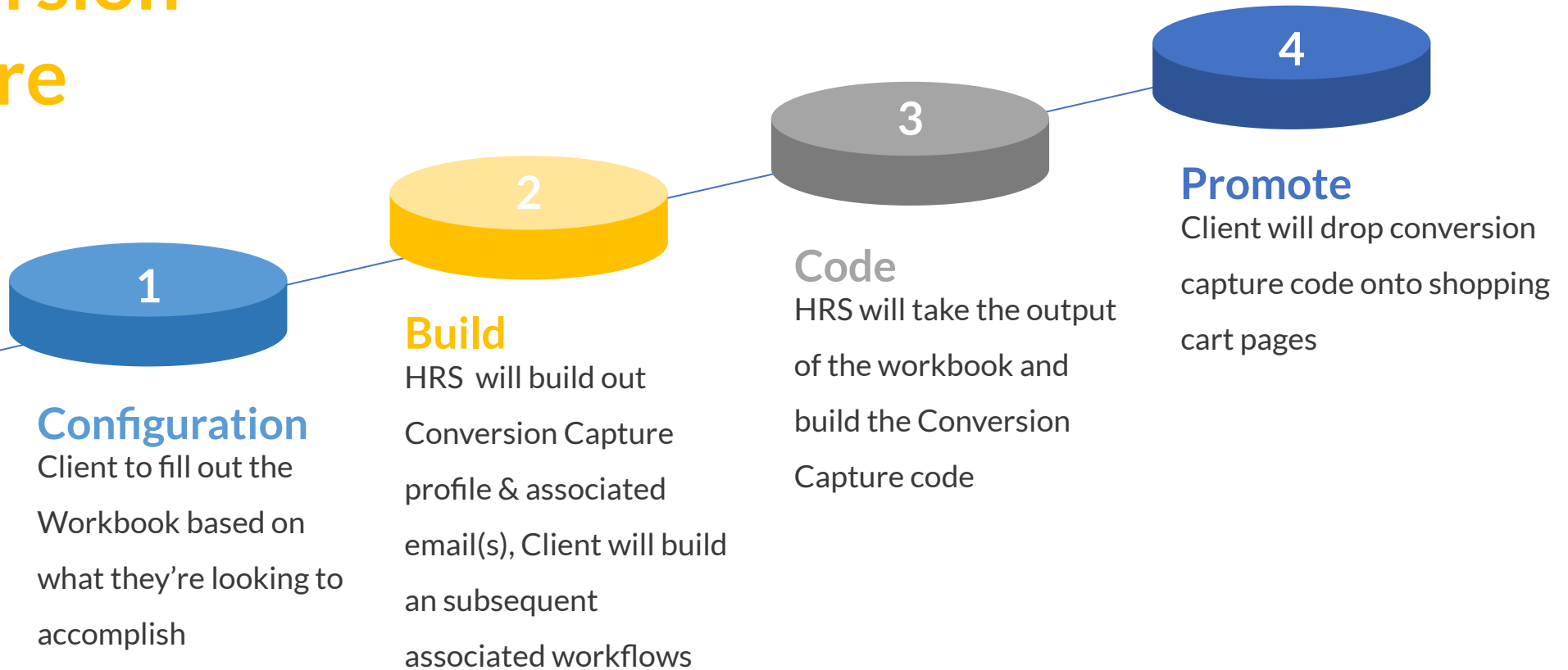


What Client will do

- Complete Conversion Capture Workbook
- Drop web code on all website pages identified
- Build out Conversion Capture & emails



Conversion Capture Steps



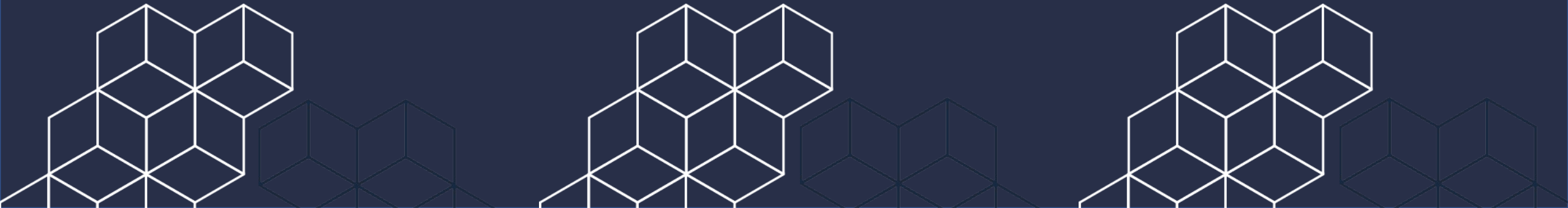
the what: marketing

the how: tech



3

Set-Up



What you'll need



Cart Abandonment

Name	Cart Abandonment	
Owner	Nilufar Vatanshoeva	
Created	22 Apr 2020 10:44	

Campaigns in Cart Abandonment

ID ^	Campaign Name	Subject	La
89214	Shopping Cart Abandonment Campaign HRS #2	Complete your order, \$AMF_FIELD_FIRST_NAME\$: We reserved the item i...	
83722	Shopping Cart Abandonment Campaign HRS	You left something in your cart.	



Cart Abandonment Project Folder



HighRead creates 1-2 emails



Client to insert subject line, preheader text, imagery

What the email might look like:



Your cart is feeling a bit abandoned.

But it's not too late to finish checking out!
Click the button to retrieve your cart and complete your transaction

Checkout Now



Take Another Look at What's in Your Cart:

FICPA - Event(20/4201498G): Federal and California Tax Update for Individuals Webcast | 4201498G x1 \$294.00

FICPA - Event(20/AIMST06): Multi-State Taxation x1 \$279.00





Florida Institute of CPAs
3800 Esplanade Way, Suite 210
Tallahassee, FL 32311

Manage Preferences | Update Member Profile Info | Unsubscribe | View Online

Step! You forgot your stuff!

Thanks for visiting Demo Shop - you left some items in your basket. You can [finish purchasing these items here.](#)

	Print 1 x1 £139.00
	Print 2 x1 £149.00



The script we are writing will pull in **product image** (if you have one), **description**, and **price** of what is left in the cart and will add a button to go back to shopping cart.

Your dashboard



IN THIS WORKSPACE

- Overview
- All Campaigns
- Automation
- Boilerplates
- Templates
- Forms
- Captures
- Report
- Settings
- Permissions
- Features
- Presets
- Bespoke Forms
- Calendar

Capture Overview

ID 39

Name FICPA

Capture Summary

Showing baskets between 14 Nov 2020 16:33 and 1 second ago.

Last 30 days

Category	Count	Percentage of Total	Total Revenue	Average Basket
Open Baskets	14	1.1%	\$4,628	\$330.57
Abandoned	339	26%	\$97,300.2	\$287.02
Converted	955	73%	\$164,595.25	\$172.35
Captured	2	0.2%	\$970	\$485

Total baskets: 1,310
Total revenue: \$267,493.45
Average basket: \$204.19

Not sent: 4
Not responded: 335

Campaign Breakdown

Campaign	Count	Revenue
Shopping Cart Abandonment Campaign #1	1	\$970
Shopping Cart Abandonment Campaign #2	1	\$0



Once the script is on your site, you'll start to see data come in on your Capture dashboard



Captured emails are your recovered carts and industry averages are 11% according to Annexe Cloud from March 2020



A decorative graphic in the top-left corner consisting of a cluster of white-outlined hexagons of varying sizes, some overlapping.

Definitions:



Open Baskets: Identify customers who have started a process but have not exceeded your given delay time period.



Abandoned: The number of visitors who have exceeded the given delay period, divided into two categories: **Not sent:** The number of visitors who cannot be sent an email as no email address can be referenced for them. **Not responded:** The number of contacts who have received an abandon email and have not then converted the abandoned basket.




Converted: The total number of visitors that completed transactions normally without being sent an email.



Captured: The amount of conversions made as a response to a capture email.



Your script might look like this:



```
<script  
src="https://apps4.highroads  
olution.com/clients/CLIENT/  
scripts/CLIENT_capture.js"><  
/script>
```


4

Exercise

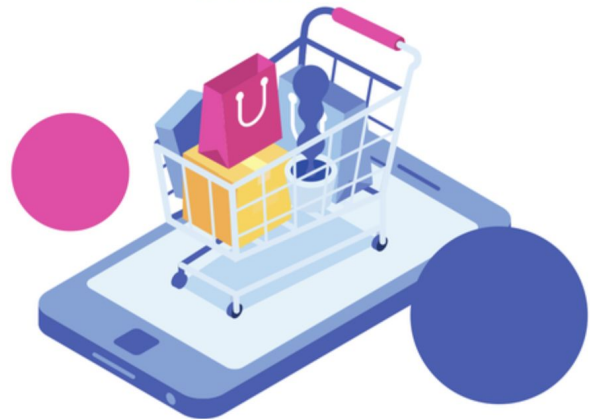




Exercise Workbook



Conversion Capture Workbook



First, we'll collect some information from you so that we can create the JavaScript and configure your Conversion Capture workspace. Please, fill out this workbook with each piece and we'll work to deliver you the JavaScript to be added to your website and configuration in your account.



Next Steps

- Fill out Conversion Capture Workbook by **XXX**

