THE DEFINITIVE GUIDE TO SAAS MARKETING

NEW BREED
Unified Marketing + Sales™
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KISSmetrics, an analytics and marketing software company, said it best: “SaaS marketing is not for the faint of heart.” It is critically different than virtually every other type of marketing. How do you market something that has no physical presence or is ever-changing?

In this guide, you will be guided through a number of comprehensive and actionable ways the most successful software companies grow their businesses. Together these elements will help you to create a highly effective marketing strategy, from goal setting through customer success.

Specifically, you will learn about:

- Goal setting
- Budgeting
- Lead generation and pipeline marketing
- Website design and optimization
- Lead handoff to sales
- Customer success
- Marketing reporting
- Key SaaS business metrics

There’s a lot to cover, so let’s get to it!
Goal Setting

“An increase in effectiveness at any stage of a sales funnel cascades through to the end funnel. But improvements to the early parts of the funnel are more important than those later in the funnel, because they meaningfully improve key SaaS metrics like cost-of-customer acquisition and pay-back period.” - Tomasz Tunguz

It comes as no surprise that setting goals is much easier than achieving them, though you still have to start at the beginning. We’ve found that one of the biggest challenges marketers face today is how to set and measure goals for their departments. For SaaS companies specifically, marketing teams are tasked with lead generation, sales-pipeline contribution and revenue generation—or what we like to call pipeline marketing.

To calculate these goals, you must work backward from your revenue-growth goals and the percentage of those goals that the marketing department is expected to source. From there, apply your funnel conversion-rate metrics to create a model that will provide visibility into how many leads your team will need to generate at each stage of the funnel, along with the amount of website traffic needed to meet these numbers.

Think about it the way award-winning copywriter and content marketer Kathryn Aragon thinks about her marketing goals, “I always start with my end goal, and work backwards. Where do I ultimately want to be? What do I want to be doing? And why does it matter?” This process can be further refined by breaking the model down by both buyer persona and marketing channel. This will help you gain insight into the annual contract value (ACV) and conversion rates of specific marketing channels. Through these insights, you’ll be able to pinpoint the most effective ways to acquire new customers.
To help in this process, we’ve built a visitor-to-customer revenue model. This template will take you through these steps, working backward from revenue goals all the way to the top of your funnel to determine lead, visit and conversion goals. Additionally you will be able to see how your company compares to other B2B companies along the way. Download the template here.

Now that you’ve determined your goals, it’s time to allocate resources to achieve them.
You started with a great idea, launched beta testing, evolved the idea into a minimum-viable product and now you have some consistent monthly recurring revenue rolling in. Now it’s time to go for real scale. What is it going to take to punch through the noise and drive new-customer acquisition?

It begins with planning, which includes goal-setting and leads into budgeting. Once you work backward from revenue goals to determine the number of visitors, leads and opportunities you need, you’re able to figure out just how much money this will take to achieve.

Industry standards for calculating marketing budgets

Of course, marketing budgets will vary greatly—ranging anywhere from 10 to 40 percent of your forecasted annual recurring revenue. However, a great method to understanding the necessary investment more accurately is to frame marketing investments as a percentage of your revenue-growth goal. To help, use 40 percent of your revenue-growth delta as a reasonable marketing spend. To put this in context, a company with $1.5 million in ARR that wants to achieve $4 million in ARR would be looking at a growth delta of $2.5 million. Forty percent of this would translate to a $1 million marketing budget. It’s also said that when assessing customer acquisition cost, companies should aim for a 1:1 ratio of dollars invested in marketing and sales for every $1 of recurring revenue generated over the first 12 months of that customer’s lifetime. It is important to keep this benchmark in mind when assessing your marketing and sales spending as a whole compared to your growth goals. To help you better understand these models, we compared them to the data presented by the Pacific Crest Survey and conducted an in-house analysis of publicly available data.
Here’s what we learned:

Correlations to the Pacific Crest Survey

When compared to the latest results, we can see that a large percentage of companies are indeed investing a large amount in marketing and sales, with a median of 28 percent of their projected growth rate. Those that are investing 35 percent or more are experiencing not only higher growth rates—but also diminishing returns when investing above the mark.
Analysis of public SaaS companies

There are many other fields of thought when it comes to determining how much your company should invest in marketing and sales. For example, Tomasz Tunguz has discussed that successful SaaS companies invest between 80 and 120 percent of their revenue in sales and marketing. To confirm the model we suggested earlier and understand whether this investment created revenue growth across each of the companies, we took the same data from 34 public companies and applied this logic of the revenue-growth delta. We began by taking the percentage of revenue invested in marketing and sales and correlated that will the percentage of revenue growth for the following year. We expected an increased investment in marketing and sales to lead to greater revenue growth. [Insert Budgeting-2] In this figure, we see that this indicator is distinctly positive at 0.54. A linear regression finds a leading coefficient of 0.82, meaning that each dollar spent on marketing and sales generated $0.82 the following year in revenue growth—a lasting, positive investment. Looking further into the future, to the two-year return, we find the same level of correlation:

![Graph showing Sales & Marketing Spend vs. Two Year Revenue Growth Rate](image-url)
Additionally, the increase in revenue growth has more than paid off, with the leading coefficient on the linear fit at 2.2. The math is the same: each dollar spent on marketing and sales generated $2.20 in two years.

Apply this to your business

These benchmarks provide a great starting point to define what you need to spend in marketing and sales to meet your business goals.

Of course, a blanket investment number is not enough, and you should be building a marketing plan that is based upon very specific goals that assess results from tactics, channels, cost per lead/customer and sales efficiency to determine the most profitable and efficient acquisition channels for your business. Work up the funnel from the number of new customers, opportunities, and MQLs you need all the way back to visitors. By doing this, you can build a marketing and sales structure and investment profile that attracts and converts at the rates necessary to meet your goals.
The SaaS marketing and sales landscape is changing. Startups are becoming far more capital-efficient than they used to be. At a presentation for The Wharton School, Tom Tunguz discussed how recent SaaS IPOs have been 2 times more VC-dollar-efficient than their predecessors. This change, as Tunguz noted, is due in large part to the shifting dynamics of the marketing and sales organizations as channels of customer acquisition have become substantially more efficient.

Once goals and budgets are established, you can begin to explore your lead-generation and pipeline-marketing options. While there are many effective strategies, we’ll outline inbound, content and lifecycle marketing that are guaranteed to help in building your repeatable customer-acquisition process.

Inbound and content marketing

Inbound marketing has become a cornerstone of successful SaaS marketing for four reasons:

▷ Lower cost of customer acquisition
▷ Allows the business to scale
▷ Shortens sales cycle
▷ Increases customer retention

As a software marketer, your company is building a solution to an important problem identified in the market. Now it’s time to start writing about it. More often than not, your passion and expertise will come through and result in amazing content.
The first step is creating content that will drive highly qualified traffic to your website. Our top recommendation is to begin blogging for your business. While it can be intimidating to produce relevant and valuable content on a regular basis, especially with limited resources, it’s absolutely attainable. Blog posts don’t need to be long. They can also be videos, slides, infographics and more. In fact HubSpot found that businesses with blogs that have accumulated at least 51 posts see 53 percent more traffic than blogs with 20 to 50 posts.

The second step is creating content that will help convert qualified prospects into leads by leveraging premium (gated) content. Premium content offers aid in converting visitors into leads at the top of funnel. Content can also be used to nurture leads further down the funnel by creating different assets that align with the buyer’s journey. That means taking your content strategy a step further and thinking past top of the funnel and into the middle and bottom of the funnel.
Buyer personas

Before you dive into shaping your content-marketing strategy, it’s important to understand and define your buyer personas, as well as the journey they go through from the awareness to decision stages of buying your product.

For tips on establishing and honing your buyer personas, we’ve gathered some of our most sought-after resources:

- 7 Things You Need to Know About Your B2B Buyer Personas
- Harnessing your Smarketing Relationship for Improved Buyer Personas

When it comes to the buyer’s journey, we recommend carefully documenting it to ensure that your company is crafting content that will help address the needs and concerns of your prospect at these crucial junctures:

![buyer personas chart](image-url)
Content promotion

Publishing content alone is not enough to be successful. You must also make sure that your content reaches the right audience beyond organic search.

**Social-media publishing:**
At a base level, it’s important you promote your content through at least one key social-media channel. For most B2B companies this includes:

- LinkedIn
- Twitter
- Facebook
- Google+

Using social media for content promotion can help to increase the reach of your marketing efforts. Share and reshare new (and old) blog posts, content offers, and videos on a regular basis. We’ve found that establishing a cadence in content promotion on social media can be very effective. While the life of a Tweet, LinkedIn post or Facebook post varies, they all remain short-lived—especially Tweets. Don’t be afraid to post the same piece of content multiple times on social media. In fact, we encourage it. Use the chart to the right as a reference for the posting cadence you should establish whenever a new piece of content is published.
In addition to using social-media channels for content promotion, take the time to find your buyer personas’ digital watering hole to generate leads. Answer questions on Quora, share articles on industry-related blogs and forums and focus relentlessly on adding value to the conversations in which you want your company to participate.

**Social-media paid promotion:**

Another great way to get your content in front of your buyer personas, and help accelerate your content efforts as you build your blog audience is through paid social promotion. The two most effective channels are LinkedIn and Facebook (the jury is still out on the impact of Twitter cards).

Here are two examples of how HubSpot has used sponsored content on both channels to promote its content:

**LinkedIn:** With more than 347 million members, each of whom has provided detailed data about his or her professional experience. This makes it a great place for B2B marketers to create highly targeted campaigns. Check out this example of a sponsored LinkedIn post promoting a premium content offer.
**Facebook:** With audience-matching capabilities, Facebook provides the opportunity to target highly qualified audiences. The biggest challenge that B2B marketers face with Facebook (although you shouldn’t let this set you back) is the discrepancy between professional and personal email addresses. This makes the ability to match your audience a bit limited. Check out the example below of a paid Facebook post promoting a tour of the new HubSpot CRM.

In addition to promoting Facebook posts to extend the reach of your content, you can create targeted ads. Target people who’ll love your business by:

- Location
- Demographics
- Interests
- Behaviors
- Connections
Influencer outreach:
Influencers likely receive lots of requests, so it’s important to build a repertoire with them over time. We recommend following Andrew Gale’s four-step framework for influencer outreach, which you can read about in depth here. We’ve summarized this four-step framework structure to help:

- Pre-engage
- Personalize your email (ego boost)
- Show that you appreciate the post (ego boost) and how your post is going to make the influencer’s even better (value boost)
- Offer or give something for free (value/ego boost)

You’ll have to do pre-engagement on your own in whatever way you feel is best to engage influences in your industry, including Twitter conversations, blog interactions and forum discussions. Once you have established some type of connection or relationship to influencers, you can begin your outreach.

Over the next couple pages we will provide a few templates to get you started.

Create a killer email marketing campaign and increase your conversion rates by following this easy-to-use checklist.
Influencer contribution to a blog post

Hi,

I hope things are going well.

My name is [YOUR NAME] with New Breed Marketing.

I'm about to publish a new [TYPE OF CONTENT] that covers [topic of the content] and wanted to ask if you would provide a quote.

The [TYPE OF CONTENT] should reach many people and your quote would provide even more value to people in our industry.

I would greatly appreciate it if you would share your thoughts on [TYPE OF CONTENT]. I'll add your thoughts to the [TYPE OF CONTENT] and will share it with you before it's published so you can look it over.

Simply respond to this email with your thoughts.

Take care,

[YOUR NAME]
Sharing a blog post with an influencer

Hey,

Happy [DAY OF WEEK]!

I know you probably get a TON of emails from companies looking for your expertise, so I'll keep this really short. I think you might find it interesting...

I'm publishing a new post on my blog this week [BLOG SYNOPSIS].

Would love to share it with you if you're interested...do you mind if I send you a link?

Thanks,
[YOUR NAME]

Blog topic pitch to influencer

Hey,

I mentioned you in my latest blog post: [POST URL]

Feel free to give it a few shares :)

I also have a blog post idea that I think would be perfect for your blog. Let me know if you're interested.

Thanks,
[YOUR NAME]
Influencer mention in a blog post

Hi,

I hope things are going well.

My name is [YOUR NAME] with New Breed Marketing.

I just published a new [TYPE OF CONTENT] and included a [MENTION, LINK, QUOTE, ETC.] from your [NAME OF CONTENT].

If you have time I’d love to hear your thoughts.

Thanks,

[YOUR NAME]
Guest blogging:

The last great strategy that goes hand-in-hand with influencer outreach and building your blog audience is guest blogging on established blogs. Similar to influencer outreach, this can take time, and we recommend actively commenting, sharing and engaging with the authors and content of the blogs on which you’d like to appear prior to making a guest request.

Once you’ve appropriately accomplished some type of relationship, you’re ready to do some outreach. Here are email templates to help get you started:

Guest blog contribution with post outline

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Hi,

I’ve been reading your blog for the last couple months. I found [xx] post that you published in [xx] month really valuable.

I would like to contribute [xx] topic as a follow-up to that post. I think it would add value to your blog and provide a new angle for your readers.

Here is an outline of the post:

- Introduction
- Subheading 1
- Subheading 2
- Subheading 3
- Conclusion

Let me know what you think.

Best,
Guest blog contribution with topics and content examples

Hi,

I’ve been following your site for quite a while (you may have noticed I regularly comment on your posts). I love that last week’s coverage of [XXX] topic.

I was checking out some of your other categories and noticed that you published a guest contribution from [GUEST CONTRIBUTOR NAME].

It got me thinking: I’d love to add value to your blog.

Here are a few title suggestions that I think would present a fresh angle for your readers and spark engagement:

- Title 1: short outline
- Title 2: short outline
- Title 3: short outline

Here are a few posts that I’ve recently published on my blog to give you an idea of the quality I can contribute:

- URL 1
- URL 2

Look forward to your response.

Best,

[YOUR NAME]
Giving thanks for comment and guest blog post pitch

Hey,

Thanks for taking the time to comment on my guest post at [GUEST BLOG URL]. I never thought of the fact that [INSERT SOMETHING THEY SAID IN THE COMMENT]. That's a good point.

Anyway, I actually have another guest post idea that would be perfect for your site.

It's called: "[GUEST BLOG PITCH TITLE]"

I could have it sent to you this week.

Either way, thanks again for your insights!

Best,

[YOUR NAME]
Lifecycle marketing

At New Breed, we define lifecycle marketing as sending the right message to the right person at the right time, this includes leads and customer alike. According to SaaS expert, Tomasz Tunguz, “The typical enterprise customer will have 10-30 interactions with a company before buying software. And because of upsell and cross-sell after the sale, more than half of the customer’s revenue potential occurs after the customer starts to pay.” It’s clear that SaaS companies must have the ability to engage prospects and customer across their entire lifecycle.

However this is a difficult proposition, and to do it effectively marketers must understand the two speeds of lifecycle marketing.

The first speed, “speed one,” refers to time-sensitive campaigns capitalizing on social trends and new-product-feature announcements, and are ultimately geared towards driving the most qualified traffic through the funnel as quickly as possible. In the SaaS environment this can be best understood as a free trial or demo campaign to a highly qualified lead.

The second speed, “speed two,” is a broader content strategy that will help attract and convert leads that are not yet ready to buy or enter into a trial. This type of marketing helps to fill your funnel with leads that are not as ready to buy, are still in the awareness or consideration phases and can be nurtured with engaging content.
While these two speeds have the power to amplify each other, when they are used incorrectly diffusion can occur and become less effective, just like two gears working in tandem. Think of it this way, in a traditional marketing and sales model that overemphasizes speed—one marketing alone, leads will drop off over time.
Lead generation and pipeline marketing: Lifecycle marketing

However, by amplifying marketing efforts between speed one and speed two, marketers can better capture revenue from leads that may have dropped off over the same delayed or extended sales cycles.

Better yet, we can then illustrate the role of both speed-one and speed-two marketing in conjunction with sales over the course of the buyer’s journey in this graphic:
INTEGRATION INTO YOUR LIFECYCLE MARKETING

What makes this type of marketing possible is the realization that not all visits, leads or even customers are created equal, and you have to analyze to their behavior to know how to bucket them into speed one or speed two, or even to identify ongoing upsell opportunities.

**Lead to MQL:** Speed-two marketing tactics are ideal for nurturing a buyer from a lead to a marketing- or sales-qualified lead. The decentralized and content-heavy nature of speed-two campaigns are ideal to engage a contact over an extended sales cycle. Then, by analyzing his or her digital body language (viewing a pricing page multiple times, or using a pricing calculator) you can shift that contact into a speed-one nurture stream and encourage him or her to sign up for a free trial.

**Free trial:** With a clearly defined beginning and ending, a free-trial campaign is an ideal time for a “speed one” focused campaign that can be centered around the key features of your product and how it can help solve the pain points of the prospect. By analyzing common conversion activities and information gathered earlier on in the buyer’s journey (perhaps from your speed-two efforts) you can then tailor the speed-one messaging to the unique needs of your persona to drive higher conversion rates.

**Customer upsell:** When someone converts to a paid customer, continually nurture him or her (speed two) until he or she indicates he or she is ready to upgrade, then fire up the speed-one upsell campaign.
At the end of the day, winning lifecycle-marketing strategies will be those that provide your leads and customers with the information they need, when they need it. By understanding the core principles and messaging behind these two speeds of marketing and combining them with digital body language and product-usage information, you can be sure that you’re delivering this information to your prospects with the right message at the right time.

**Speed-one marketing initiatives**

For SaaS companies, speed-one marketing strategies can include a free trial. While much of the focus is on driving leads into a free trial and further nurturing them with email communications, this isn’t enough. SaaS marketers must be able to look further down the funnel and see the impact that their free-trial marketing efforts have over the entire lifetime of a customer.

The messaging and communication within your free trial should be customized to the unique needs of your buyer personas, the exact same way your marketing messages that got them into the free trial in the first place were.

For example, an e-commerce company could change its free-trial messaging for someone who is just starting out with e-commerce compared to someone who is an experienced e-commerce user. This is because the key features to which he or she needs to be introduced will be entirely different. Advanced users might be more interested in the reports they can run on their store performance, while someone who is just getting started needs to be instructed on how to add a product to his or her store to begin with.
Free-trial cohort analysis by buyer persona:

Once personalized free-trial experiences are in place for each of your buyer personas, it’s time to analyze the results. Instead of looking at a temporal analysis of your free-trial conversion rates and lifetime value, monthly recurring revenue and churn, analyze all these different factors with a better understanding of the actual users behind these numbers. You can also see how they are converting in your trial and how valuable they are to your business over their entire lifetime.

To accomplish this, you can use a cohort analysis to improve user onboarding and free-trial conversion rates. Many SaaS companies use cohort analysis to measure customer lifetime value, revenue per customer and churn to ensure their customer-acquisition strategy is effective. One of the best ways to understand and optimize free trials is to break them down by different buyer personas.

This analysis can have a profound impact not only on the effectiveness of your marketing efforts and which customers can be acquired the most efficiently, but also on your product itself and which users are finding the most value.

To help make this type of analysis easier we just released a Free Trial and Buyer Persona Cohort Analysis Template.
Lead generation and pipeline marketing: Lifecycle marketing

Speed-two marketing initiatives

You will come across leads that are a perfect fit for your business and product, but they may not be ready to buy. That doesn’t mean they won’t ever buy. By implementing a broader content strategy through a series of small conversations, you can help nurture and onboard new customers. For these customers, enroll them in contextually relevant drip nurturing campaigns.

For example, Sujan Patel, the vice president of marketing at When I Work, recommends setting up an drip campaign to resell the value prop, re-educate and offer incentives for users to come back. His campaigns go as far as creating a 12-month drip campaign. The frequency will depend on the trial length but it typically goes: Day 1, 4, 7, 14, 21, 30 & 45 days. Then every two weeks after that.

User onboarding

Often, software-based solutions require coaching, education and insights for your personas to experience the value and maximize a given functionality.

When it comes to lifecycle campaigns, you want to create your strategy around key moments in the lifecycle. Your emails should convey value and be as helpful as possible, rather than be a vehicle for self-promotion. To begin, spend time identifying the flow of your onboarding process and align your emails with the actions you want recipients to take for them to become activated users.
There are many different lifecycle emails you could employ, but to get you started here are four of the quintessential emails you should be leveraging:

- The welcome email
- The getting-started email
- The milestone email
- The upsell email

Welcome email
Your welcome email should be actionable, informative and clear. While you want recipients to engage with your email by viewing or clicking on it, in reality the goal of your welcome email is to move users through the onboarding process (and get them to use your product).

Best practices:

- If you include an introduction, make it brief.
- Build momentum; your email should reflect what you want users to do next.
- Include a clear, compelling and enticing call to action.
Getting-started email

Your getting-started email takes the welcome email a step further. Once you’ve welcomed new customers, it’s time for them to dive into your software. The goal of this email is to move them from the inbox to the app or platform as efficiently as possible. The sooner users take action, the sooner they’ll garner value from your product.

Best practices:

- Focus on benefits, not features.
- Include a deep link; don’t make users jump through hoops to get to the feature you suggested they check out.
- Use data to your advantage by not asking people to do something they’ve already completed with your software, such as setting up their profiles.
- Educate, educate, educate.

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Hello Olivia,

You’ve just finished installing the Grammarly App for your browser. This completely free version of Grammarly is now ready for your enjoyment. The internet is so much better with Grammarly, period.

[Check Your Text Now]

Thank you!
— The Grammarly Team

The email address linked to this account is: oliviaperek@gmail.com

Forgot your password? [Request it here]
Milestone email

The milestone email should reinforce the value your software is delivering by speaking to the recipient’s accomplishment. In doing so you make your customers feel good about their experiences and get them excited to get back into your product.

Best practices:

- Make users feel awesome for using your product by employing upbeat, positive language.
- Use micro-CTAs to deepen your relationship, such as referring a friend or following on Twitter.
Upsell email
At this point, customers have been using your product for some time. Now is a perfect opportunity to add even more value for your customers.

While “upsell” generally holds a negative connotation, many times users welcome these emails. If executed strategically, customers truly appreciate your letting them know about something great they may have missed before.

Best practices:

- Again, focus on the benefits vs. the features.
- Weave an upsell through a communication you would have sent anyway (i.e product update, shipping confirmation, etc.).
- Include personalization so the recipient feels good about his or her relationship with you and recognizes that you’re paying attention to his or her experience.

There are many more onboarding emails that you should strongly consider adding to your lifecycle-marketing and customer-success strategies. These examples are designed to get you started and onboard customers sooner, rather than later.
“If you market a SaaS application using a low-touch sales model, most of your customers will have very little interactions with your sales team, which turns your website into the face of your company. Use this as an opportunity to make your website your best marketing person!” - Christoph Janz

The primary objective of your website is to attract visitors, turn many of them into trial users or leads and ultimately win those users as customers. In other words, conversion, conversion, conversion. Your website needs to be an online lead-generation machine that is fine-tuned to convert and engage visitors. To achieve this, you need to keep visitors on your website longer. This is because the longer they explore, the greater the opportunity for conversion. We’ll cover how particular design elements can help keep visitors around longer and turn them into paying customers.

5 must-have SaaS Web elements

**Value proposition**

As a rule of thumb, you should aim to communicate your value proposition within ten seconds. This is a statement on your homepage that clearly defines your solution for your personas and why it is the optimal choice over competitors in your industry.

muHive, a customer-engagement solution, went through multiple rounds of site revamps, including its homepage. Prior to beginning the process, the team received feedback that its homepage didn’t clearly state what the company does, resulting in a higher bounce rate. To remedy this, the team created and tested different copy options. An effective value proposition can increase your ROI by approximately 15 percent. Ultimately, muHive was able to decrease the bounce rate of the homepage through a clear, concise value proposition and testing of multiple versions.
As buyers spend more of their time self-educating before contacting sales, the pricing page of SaaS websites has reached critical importance in the buyers’ journey for enterprise SaaS sales and especially for companies who have a lower monthly subscription cost or annual contract value. Why? Because it’s the place where people go to decide if they want to use (and pay for) your service or not. For SaaS companies, this means you need to:

- Have a pricing page.
- Make it easy to find and navigate.
- Include different packages or options that speak to your buyer personas.

When designing your pricing page to its full potential, keep these lessons in mind:

- Create different tiers of plans that speak to each buyer persona you are targeting.
- Structure pricing that scales with usage through value metrics, but keep this simple enough so customers understand what value they’ll actually derive from your solution.
- Don’t skimp on design or user experience, but don’t go over the top. Make the design of your pricing page clear, concise and specific.
Basic best practices for the anatomy of a SaaS pricing page

The anatomy of pricing pages highlight best practices in aligning products, pricing, design and messaging to help educate your site visitors and enable your sales process. It should generally adhere to this basic structure:

<table>
<thead>
<tr>
<th>Basic</th>
<th>Pro</th>
<th>Enterprise</th>
<th>Custom</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Level Value Prop (Who it is for)</td>
<td>High Level Value Prop (Who it is for)</td>
<td>High Level Value Prop (Who it is for)</td>
<td>Beyond Basic, Pro and Enterprise OR a Customized Version</td>
</tr>
<tr>
<td>Threshold (# of Users, Transactions)</td>
<td>Threshold (# of Users, Transactions)</td>
<td>Threshold (# of Users, Transactions)</td>
<td>Above Enterprise Threshold</td>
</tr>
<tr>
<td>Price/Month or Contact [CTA BUTTON]</td>
<td>Price/Month or Contact [CTA BUTTON]</td>
<td>Price/Month or Contact [CTA BUTTON]</td>
<td>Contact or Schedule [CTA BUTTON]</td>
</tr>
<tr>
<td>Additional Thresholds Key Features</td>
<td>Additional Thresholds Key Features</td>
<td>Additional Thresholds Key Features</td>
<td>Additional Thresholds Key Features</td>
</tr>
</tbody>
</table>

Free trial/demo calls to action

Take advantage of your inherent ability to let your potential customers use your product before they buy it. An effective free trial can allow for increased lead qualification and ultimately lower customer acquisition cost.
The first step to getting visitors into a free trial is to promote it on your site. This is achieved by creating and placing calls to action for the free trial/demo throughout your website, particularly on your homepage. But more than just throwing a button on your site with some basic microcopy, a free trial/demo CTA needs to be strategically designed or no one will ever convert into a user. In fact, the conversion rate from visitor to trial is just 8.4 percent.

Bizible's solution for increasing free-demo users was to implement the persistent demo form. It added a global request-a-demo form on every page, including the blog. It leveraged HubSpot's an inline form, which also fills in your information if you've downloaded content previously. This addition increased demo requests by 40 percent.

Other ways to increase free trial/demo conversions:

- Add "free" to your CTA copy.
- Have the form scroll with the visitor.
- Make the form short.
- Test different color buttons.
- Add a human element (imagery).
- Include social proof.

Pop-ups

Pop-up and exit intent forms are a great way to capture leads and actionable, direct feedback from your website visitors.
For example, Office Drop was able to increase its pricing-page conversion rate by 40 percent by incorporating user feedback. It gathered feedback by asking users who stayed on its pricing page for 40 seconds or more through a pop-up.

Exit intent pop-ups are a great way to capture leads from content offers and build your subscriber list or newsletter. The key to success with these pop-ups is to ensure that they are presented at a time where users do not feel their experience is being interrupted, but rather enhanced. According to mageworx, the best time to display a pop-up is 60 seconds after a website visitor has entered your site.

**Live chat**

Add live chat to your site to allow visitors to reach out directly to a sales rep at their convenience. Dave Rigotti of Bizible has recounted to us that although Bizible’s live chat does not generate a large number of leads every month, the leads sourced through the live chat contribute more than 25 percent of its new monthly recurring revenue. This makes it one of the business’s top three sales channels in terms of revenue generation. This is a great example of effective pipeline marketing and a strategy in which all SaaS companies should consider investing.
4 ways to optimize your website

With these elements in place, it’s important to continue to optimize your website over time by running strategic A/B tests. To do this:

- Begin with a foundation of analytics and define reporting requirements, the tools (platform) needed and the personnel structure required to undertake a CRO effort successfully.
- Identify the key benchmarks for existing performance (visit-to-lead conversion rate, bounce rate, time on site, etc.) that you’ll be measuring and form a clear and measurable hypothesis on how these can be improved.
- Set clear goals on what you’re hoping to achieve.

A simple and proven framework to start a program like this can be bucketing your pages into a quadrant looking at both the conversion rate and the amount of traffic each page receives.

Now back to the framework. Let’s get started! Think of our quadrants as a Cartesian system and begin with Quadrant I:
High traffic and high conversions:

These are your top-performing pages and can be prioritized last for optimization testing.

However, they've been the cornerstone of our lead-generation efforts for months. Start by assessing these pages and understanding why they do well. Are they featured prominently in your navigation and driving lots of direct traffic? Are they SEO-optimized and ranking well for a high-volume search term? Are the CTAs on this page clearer than those on the rest of your site? Is the content so compelling that someone couldn’t possibly not convert?

With this in mind, determine how these elements can be carried over to pages that aren’t performing as well.

High traffic and low conversions:

These should be the first pages you begin to test and prioritize.

- Test imagery, a pair of eyes looking at a CTA will help improve the click-through rate.
- Action at the top of the page is taken more than action at the bottom of the page.
- Limit CTAs on the page (ideally limited to one per page).
- Evaluate content.
Low traffic and low conversions:

This is the toughest segment of the lot. Not only are they not driving conversions, they’re also not getting as much traffic. This means it’s going to take more time for those pages to reach a statistically significant volume of conversions to reach conclusions on any test.

- Figure out how to drive more traffic.
- Incorporate what you’ve learned in your other tests.

Low traffic and high conversions:

These should be your second priority after you have tests up and running on your high-traffic, low-conversion pages.

- Drive more quality traffic.
- Start with optimization via paid and organic search.
- Improve navigation to drive more traffic.

Now that your tests are up and running, continue to measure and optimize over time.
At this point, you’ve implemented immense infrastructure to your marketing strategy and leads are coming in hot. Now is a time when the alignment between marketing and sales is crucial. For most sales teams, valuable inbound leads will remain untouched for days before anyone on the sales team is able to call that person and begin the process of selling.

Inbound leads are the most valuable high-converting leads for sales teams, and if you don’t engage with them right away, the value of those leads drops quickly. Here are the tools and processes your sales team needs to convert inbound leads to sales opportunities and closed-won deals.

The buyer persona/buyer’s journey matrix:

Determining when to hand off inbound leads to sales reps is a critical step in the success of any inbound marketing plan. Many companies rely on lead scoring to help define this process. However, HubSpot has established a different model, the buyer persona/buyer’s journey matrix. This model illustrates the different personas and stages of the buyer’s journey.
With this detailed understanding of the buyer’s journey, a prospect would move through before purchasing HubSpot, its sales team was then able to correlate the value of each lead. They considered its persona and stage of the buyer’s journey to determine potential revenue and make the most educated decision possible as to when to pass that lead to sales, like this:

With this model established, HubSpot was able to pass a certain perceived dollar value of leads to the sales team each month, instead of just a number of marketing-qualified leads. Using microsegmentation experiments, HubSpot was able to optimize this model continually. In turn, it could ensure that prospects made it to sales at just the right time in their buyer’s journey in a way that would best align with HubSpot’s growth goals.
Not only is this a great way to approach lead scoring, but it also epitomizes the pipeline-marketing methodology that HubSpot used to grow its business. By holding marketing accountable to the same metric (revenue), instead of lead or MQL velocity, it ensures that everyone is on the same page and that marketing is responsible for reporting on total direct MRR pipeline. We can even see this in action in this presentation from Mike Volpe:

Steps to take for engaging inbound leads

This section was contributed by Cara Hogan of InsightSquared in a guest post on the New Breed blog. Cara is a content marketing manager at InsightSquared, where she contributes to the Business Analytics blog and hosts the Million Dollar Insights podcast.

Reach out to leads quickly

There’s no excuse for an inbound lead to sit in queue for days before a rep is able to call that person. However, if your company’s sales process isn’t set up to prioritize inbound leads, that’s exactly what will happen by default. As BDRs work through the leads they’ve been assigned, they will usually start with the oldest and work their way to the newest leads. This works fine for most outbound leads. However it does not work for inbound.
Industry research has shown that if you **call an inbound lead within 15 minutes of engagement** with your content, the conversion rates are significantly higher. It makes sense. That prospect has **just downloaded and read your content**, so your company is top-of-mind. If you wait a few days or even a few hours, she may have forgotten all about your company and your product. But if a rep calls her within a short window of time, she will be much more likely to talk and more open to hearing a sales pitch. Instead of putting inbound and outbound leads into the same queue, make sure you separate inbound leads and push them to the front of the line, every time.

### Give content and context

Now that reps are calling inbound leads quickly, they have to have the right information on hand to ensure that call is a success. In order to engage effectively with inbound leads and move them down the sales funnel, reps need to know exactly which **marketing content** the prospect has engaged with to guide the call. They should look in the CRM and see the form the prospect filled out, which will tell them the exact marketing materials they should know. For example, if a prospect has downloaded an e-book on **data-driven sales forecasting**, reps should generally know what that e-book is about so they can discuss it and sound knowledgeable.

You don’t want your reps to get caught short-talking to a prospect who says, “I read that great e-book on your site about sales forecasting. Can you tell me more about what was discussed in Chapter 3?” You should create an easy-to-access **library of all of your marketing content**, with summaries and information that reps can read quickly before sales calls. With a content library, reps will be prepared and ready to discuss the prospect’s specific area of interest. Even better, they can then follow up and send the prospect more content like the one he or she has downloaded, continuing to educate the buyer after the call.
Unfortunately, not every inbound lead is going to answer the phone or an email on the first try. However, your team can't give up on these valuable prospects after just one try, even if the rate of engagement goes down over time. Instead, you should have a set expectation for how many times reps should engage with inbound leads before moving on to the next one.

This is where you need to build out a clear sales process, which ensures reps are never confused or uncertain how to engage with an inbound lead next. To help clarify the process, you should create an MQL workflow that outlines every step in your company's ideal sales process step by step. This way, reps know exactly how many times to call, email and engage with an inbound lead before booking a meeting or moving on to the next lead. This will help your reps understand not only which leads are worth their time and effort, but also which are not.

Sales leaders should treat inbound leads like absolute gold, and the sales process should reflect that. Your team should be calling inbound leads quickly, offering interesting content and engaging consistently. With the right sales engagement, an inbound lead will quickly become your newest customer.
Customer success has been incredibly impactful on the growth of SaaS companies because it can help to:

- Reduce churn
- Impact new revenue
- Drive team performance

In fact, customer success is on par with marketing and sales as a growth driver. With buying habits shifting, and software companies adopting a subscription-based pricing model, building relationships and trust with customers has become a necessity. As a result, the most successful SaaS companies have adopted a series of success metrics to help them understand their customer-happiness level and how it correlates to revenue. For example, churn—or the measurement of customers downgrading or leaving your service/product—is crucial to success.

While customer retention, success and driving upsells are all key to sustaining and accelerating your company’s growth, studies show that many executives continue to place emphasis on net-new customer acquisition alone:
To help address this, if you want customers to continue using your software, and drive retention and upsells you need to give them a reason to do so. Groove is awesome at this! We reached out to Len Markidan, head of marketing at Groove for his take on the importance of customer success and social care:

“The principles of good customer service don’t really change in social; make it as easy and pleasant for your customers to do business with you as possible, and give them a reason to be so happy that they’ll tell their friends about you. What changes most is speed. Compared to email, where most customer are happy to wait up to 24 hours for a response, 32 percent of social users expect a response within 30 minutes, and 42 percent expect a response within an hour. That expectation doesn’t change by much on nights and weekends, either. So if you’re going to invest in social customer service -- and the research suggests that you probably should -- **understand that your customers expect you to be quick.**"

Before you can begin implementing customer success in your organization, you must identify, measure and analyze specific metrics.

**Begin with these success metrics**

**Churn**

Many VCs will argue that churn is the single most important metric SaaS companies could be measuring. While we’ll leave that up to debate, there’s no denying the weight of churn on business growth. [Churn can be measured in many different ways](#), but at its core it is the percentage of customers who were able to cancel their subscriptions to your product over a certain period of time and did so.
Traditionally, most companies measure churn as the MRR that cancels in a given month as a percent of the total MRR with which they entered the month. But churn isn’t a "one-size-fits-all" metric. Here are the other ways to measure churn:

- **By customer**: The number of customers/accounts that churned over a given time period (week, month, quarter, etc.)

- **By number of users/licenses**: Lost users/licenses within product instances in the month.
  
  This metric allows works well for products offering unlimited seats to see what accounts are decreasing usage, and may be more likely to churn entirely in the future and deserve immediate attention from your customer success team.

- **By revenue**: Lost MRR from customers who churned in the month (net MRR churn)
  
  Net MRR churn is important because though a basic churn measurement of percentage of customers lost is important, it does not identify what percentage of overall revenues was lost. Net MRR churn enables insights into the dollar value of the churned customers. This is the number that will become negative if the expansion revenue from existing customers starts to outstrip the lost revenue from churn.

Just as a high churn rate can inhibit a business from being successful, negative churn is a powerful growth mechanism. Despite this, 86 percent of SaaS executives are focused on funding and prioritizing new-customer acquisition, while only 56 percent are focused on new-customer renewals and only 74 percent report measuring churn at all. Because of this, over the past few years we have seen the rise of B2B SaaS customer success teams as a critical part of successful businesses. Their sole focus is on helping customers implement the product and leverage it successfully.
At the end of the day, it is revenue that matters the most. But by reporting on churn at a granular level, great SaaS companies are able to understand the needs of their customers and the strengths and weaknesses of their products. Churn can also be used to see what sales and marketing tactics drive customers with longer retention rates, and therefore higher lifetime value. This is especially important in an era where customer success is critical for scaling success.

### Net promoter score

There are only two questions you need to ask customers to measure your performance and identify areas for improvement and growth. By asking: *How likely is it that you would recommend [your company] to a friend or colleague? and Why?*, you can track how your company is doing through your customers’ eyes.

The net promoter score is based on the fundamental perspective that every company’s customers can be divided into three categories: promoters, passives and detractors. Ultimately, by launching an NPS campaign you get a deeper understanding of what you do right and what you could improve on while identifying promoters of your business. It’s essential to align yourself with customer promoters because they:

- Buy more
- Stay longer
- Refer friends
- Provide valuable feedback and ideas

It’s easy to launch an NPS campaign, especially when you’re using HubSpot and SurveyMonkey. [Here’s a step-by-step guide to get you going.](#)
Once success metrics are in place, you can begin strategizing how your business is going to enhance and maintain customer success. In the next section, we’ll review how you can leverage content marketing to delight customers.

Strategies for the beginning

There are many ways in which your overall team can work to improve customer happiness/satisfaction, software adoption and success. We find the most cost-effective way is through content marketing. While attracting visitors and converting leads is critical to business success, so is customer happiness and retention. Content can be an effective tool to educate, train and teach customers.

Customer-focused content

Blog about the methodology your product enables
As a best practice, your business blog should be focused on the pain points and needs of your buyer personas. However, that doesn’t mean you stop educating them after they make a purchase. You should strive to create content that will continue to educate your customers over time. Focus on writing about the methodology that your product enables with varying degrees of sophistication so your prospects at the beginning of the journey can be educated in the same way that a customer can.

Write about API use cases
Customer success is predicated on helping your customers use your platform to its fullest. APIs are not only a fantastic path to growth, they are also a great mechanism to help expand your customers’ use of the platform or open up new opportunities and ways to use your tools.
A recent example of this comes from Mention. It just published a fantastic piece on how it reduces churn and increase customer happiness. To do so, it is using five different software platforms!

This is a complex use case, and one that not everyone could come up with on their own. However, by educating customers about the use case and providing clear support on how it can be executed, Mention has enabled its customers to go and implement it.

**Use online resources for customer engagement**

Customer success starts and ends with top-notch customer support. Without relevant information, you shouldn’t be reaching out to your users. The goal of customer success isn’t solely customer happiness, but “[helping] them reach their desired outcome.”

This means it doesn’t have to be a support call or document to help solve a problem. By providing your customer-success specialists with an inventory of marketing assets, they can expand the arsenal of content and information they have. That way, when they do reach out to customers they have all the tools to help a customer at their disposal.

Tinderbox is a great example of this. Throughout its blog content, it sprinkles in customer-success stories, product-specific how-tos and updates to which it can direct customers when they have a question. From there, customers can educate themselves further. If the problem or question lingers, they will have a more specific understanding of the issue to help the customer-success team find the best solution.

These resources can also be used to engage your existing customer base via email or social media to keep them coming back, logging in and using all the features your product has to offer.
Fostering social dialogues with your customers

According to Nielson’s 2012 Social Media Report, roughly 1 in 5 consumers use social media to ask questions, report satisfaction or complain. Additionally, one-third of social-media users prefer “social care” to using the phone. There are a number of different ways to foster happiness using social media such as:

- **Creating unforgettable experiences** by listening to your customers and any mentions of your company. If they complain, respond. If they have an issue, offer a solution. If they commend your work, send them some branded swag.

- **Being attentive and supportive** through every situation. By being on social media and following your customers, you’re inviting them to a conversation. So when they mention you, don’t ignore them.

- **Follow through on your social-media presence.** Often, companies who are finding little success or value in social media in terms of business growth will abandon whatever pages they created. As a rule of thumb, follow through, or you’ll just make yourself look bad.

- **Go the extra mile** in maintaining a relationship with your customers. Whether they’re talking about your specific software or not, fit yourself into the conversation when appropriate. It’ll show you care less about their business and more about them as people.

- **Don’t be a coward**, even if what your customer is saying about you is negative. In fact, 83 percent of customers who Tweet complaints love it when companies respond, so why not.
The goal of your marketing reporting should be to help you move from data to insights and growth strategy.

To do this, you must act like a scientist. Data gives you a starting point but in order to garner value from it, you need to spend time manipulating and testing your marketing efforts.

The most effective way to test your marketing is to create small experiments that can be achieved in a day. You want to be able to gather valuable data quickly and efficiently so you can continue to draw conclusions and build out new experiments. The faster you learn what works, where it works and when it works, the faster you can build your business.
Follow the scientific method

1. Start with the data.
2. Ask a question of what information you have available to you.
3. Construct a hypothesis.
4. Test with an experiment.
5. Confirm the test/procedure worked as planned.
6. Analyze the data and draw conclusions.
7. Present results and determine the next steps.

There are many ways to gain insight from your data, but in order to do so you need to take the time to sit down and analyze what you’re seeing. By taking the time to understand how and why leads and customers react to your marketing strategy, you can find scalable ways to grow your business. The beauty of this process is that the more quickly you test and improve, the faster your business will grow.

As you improve and optimize individual pages, tactics and strategies, it’s important to put these results in the context of proven attribution models that look further down the marketing funnel to show the contribution over time.

Overview of the key attribution models

First-touch attribution model:

Since blogging is so effective at driving traffic from organic search, social media and referrals, a first-touch attribution model is perhaps the simplest way to apply credit to a given marketing tactic. This method is one of the simplest to implement as the first step in understanding the success of your inbound efforts.
However, a first-touch model doesn’t show the entire picture or value of an asset as a prospect continues to engage with your content over time. Nonetheless, it is an important place to start when illustrating blog attribution.

To leverage this model, website visitors must be “cookie’d” when they are still anonymous on their first visit using a platform such as HubSpot. In using this model, you can report on overall monthly blog-generated leads. If you are using this model alone, 100 percent of the revenue is then attributed to the asset that generated this first view or click. It looks like this:

**Last-touch attribution model**

A last-touch attribution model gives credit to the last post viewed before a contact converted on a landing page and became an engaged lead. A last-touch model is beneficial for looking at your most influential posts for driving leads at the top of the funnel.

In a last-touch model, 100 percent of the revenue is attributed to the last-touched post, and looks like this:
First and last touch attribution:

Thus by looking at both first-touch and last-touch attribution we are able to get a better idea of the blog posts that are helping us drive leads. A combination attribution model looks like this:

This model is a great place to start for companies to understand how their blogs are contributing to their pipelines. But again, it does fall short in undervaluing the role the rest of your content plays over the entire sales cycle.

Linear attribution model:

If you have a complex buyer’s journey, a linear attribution model allows you to attribute each touch with equal importance. This model aligns well with the way that buyers are making decisions today as prospects are consuming more content than ever before making a purchasing decision. This will also address any concerns about unfair attribution given to the first or last touch. It looks like this:
Time-decay attribution model:

A time-decay attribution model gives the most weight to the last touch, and then slightly less revenue credit moving back to the first touch, and looks like this:

![Time-decay model graph]

This is not a great model for content marketing, especially blogging, as it undervalues the first touches at the top of the funnel where your blog is serving as an attraction engine and rightfully deserves credit for doing so. However, this model can be great to help identify key sales-enablement content if reps are using blogs and content offers throughout the sales process.
Every type of business has a core set of metrics that must be tracked to help influence key decisions, forecasting and business growth. SaaS businesses are no different and have a clear set of metrics that should be tracked during a specific phase of business growth or over their entire lifetime.

Lars Lofgen and Andrew Chen published a great chart breaking down the two key stages and some of the metrics that should be tracked before a business has found product/market fit, as well as during the expansion or high growth phase:

**Type of metric**

<table>
<thead>
<tr>
<th>Stage</th>
<th>Qualitative</th>
<th>Quantitative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-product/market fit</td>
<td>Customer feedback</td>
<td>Customer surveys</td>
</tr>
<tr>
<td>Scale and expansion</td>
<td>MRR, Churn, LTV, CPA</td>
<td></td>
</tr>
</tbody>
</table>
The most important SaaS metrics to measure

1. Monthly recurring revenue

Increasing MRR from expansion or net-new sales is the key to growing a SaaS business, and is measured by calculating the total recurring revenue generated from your customer base (excluding non-recurring service revenue, etc.).

MRR should be reported on over standard time periods—generally customers at the start of a month and customers at the end of that month, or expanded into cohorts of 60 days, 90 days, etc. Increasing MRR should be a core goal of a SaaS business’s marketing, sales and customer-success teams.
When assessing MRR alone it is important to keep in mind that it can be limited as a metric because it does not account for churn or lifetime value, however it still provides critical high-level insight into the health and growth of a business.

**Growth Benchmarks**

- After initial traction ($1–2 million in ARR), growth becomes critical.
- Once you get to $2 million in ARR you want to get to $10 million in ARR in six quarters or less.
- Your per-month target should be a 15 percent MRR growth rate.

### 2. Customer-acquisition cost

Customer-acquisition cost is the fully burdened marketing, sales cost of acquiring a customer. It is a key financial metric that marketing leaders should be expected to calculate and report. Understanding the investment required to acquire a new customer is critical to budgeting and tactical allocation towards the most profitable tactics/channels.

Not only will a lower CAC allow you to acquire more customers, it will also decrease the amount of time it takes to recover that cost and increase customer lifetime value. This is in large part why content and inbound marketing have become such valuable tactics for SaaS businesses, as they offer compounding returns and enable more capital-efficient acquisition.

CAC can provide even more insight when analyzed alongside customer lifetime value. This will enable you to see the net profit the business will generate for a given customer. There are two ways that it can be measured, gross CAC (before churn) and net CAC (after churn).
3. Customer lifetime value

The amount of revenue generated per customer on average across your entire client base over its entire lifetime.

Customer lifetime value, when analyzed alongside customer acquisition cost and churn, makes up the first essential metric for scale- and expansion-stage companies. Together these metrics enable companies to determine what capital is needed to invest in customer acquisition successfully, and how profitable those customers will be for the business. They also cover the challenges associated to retaining and growing a customer base.

4. LTV:CAC ratio

Finally, LTV:CAC ratio provides insight into how profitable a customer will be for the business over its lifetime, and the return your business will see from that customer. Successful SaaS companies generally realize a 3:1 ratio. For example, if $1 is needed for marketing and sales to acquire a customer, $3 should be generated by the recurring revenue from that customer over its lifetime.
Conclusion

Grow your business

We hope you’ve found this guide and methodology helpful, and that we’ve given you some tools or ideas that you can apply to your business today. If you’re looking for a partner to help you implement any of the strategies that we’ve discussed in this guide, please reach out to us. We look forward to continuing the conversation with you as your business grows.

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