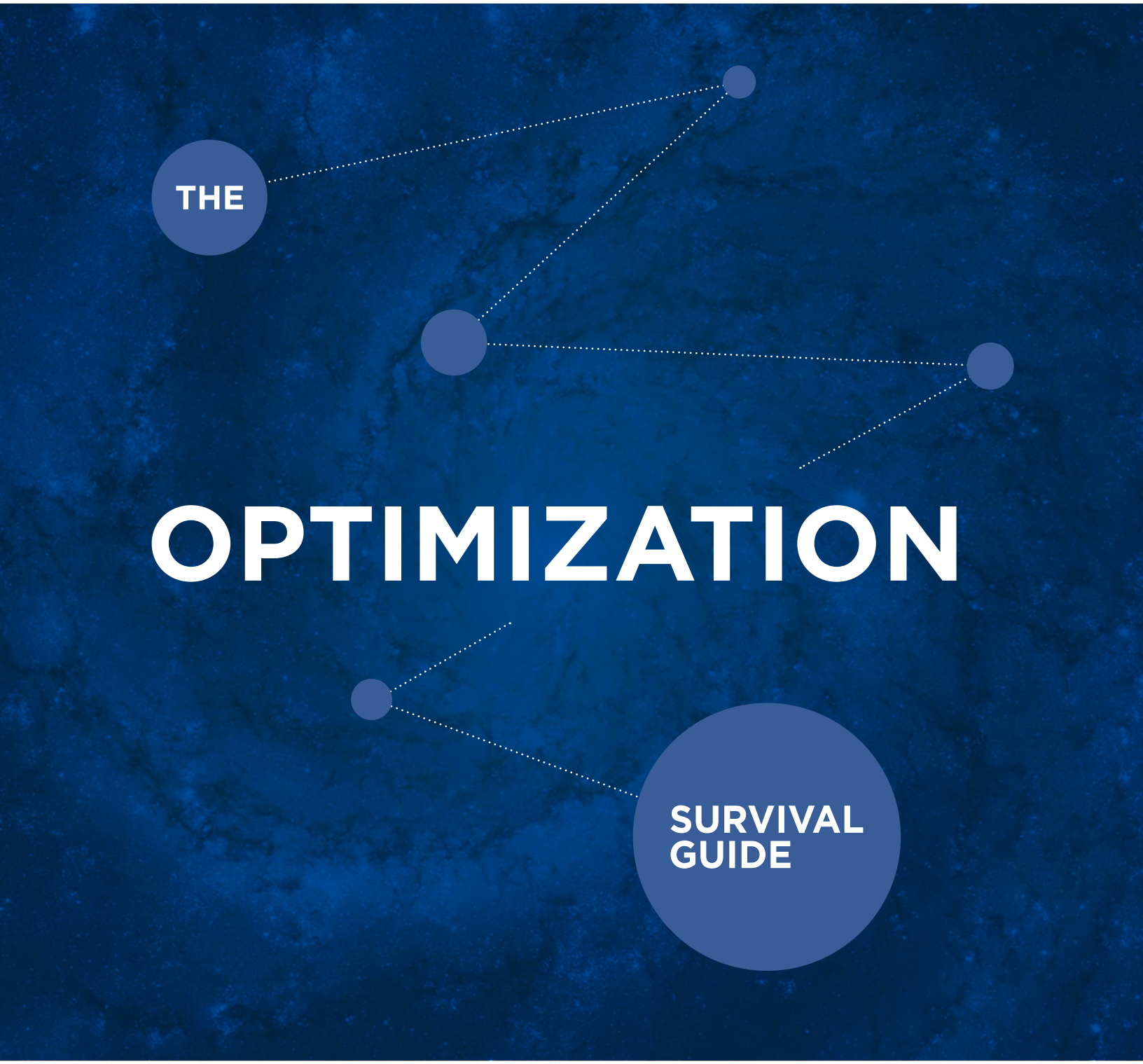
Optimizely



A Guide on Strategy, Building a Culture, and Testing Ideas

Written for Experimenters, by Experimenters of the Optiverse

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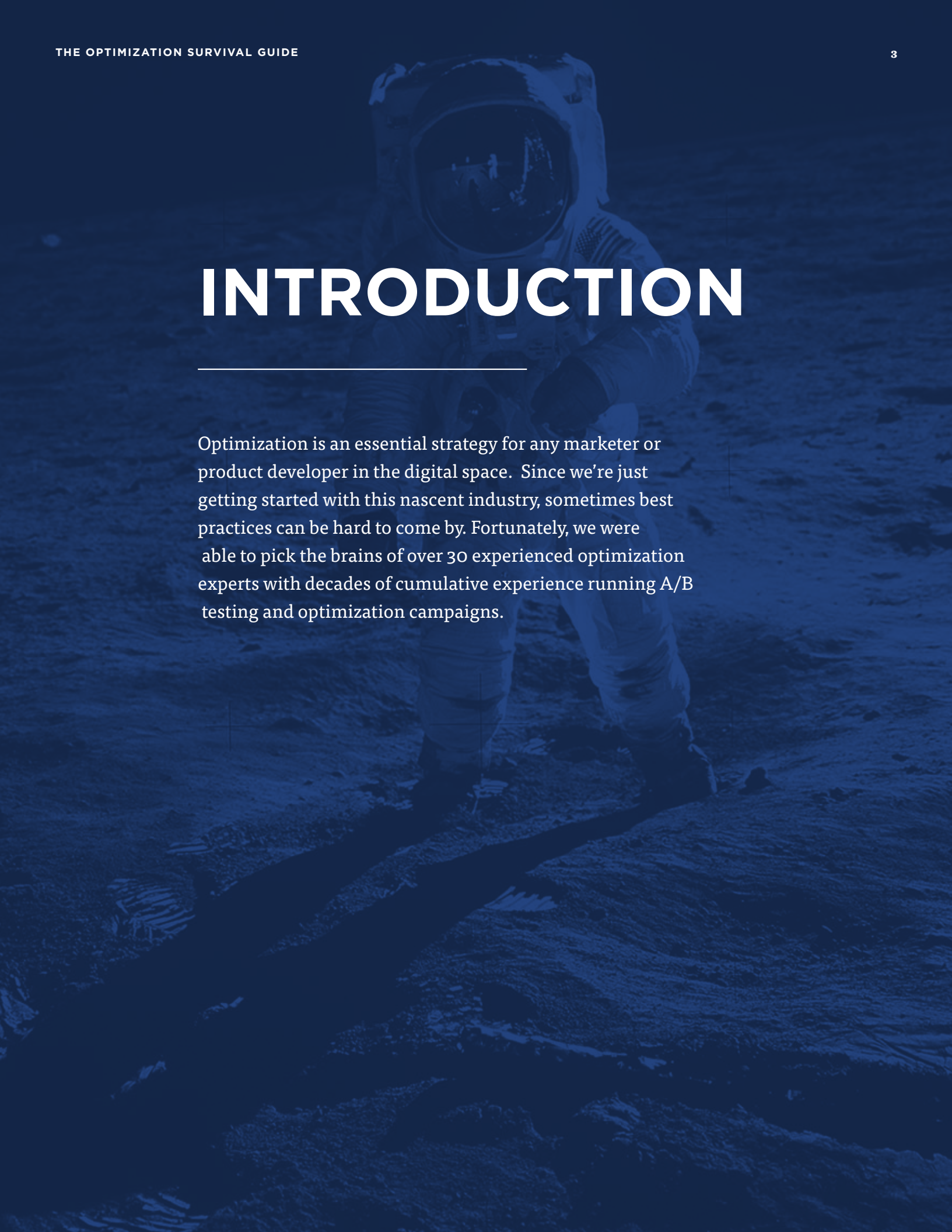

INTRODUCTION

Optimization is an essential strategy for any marketer or product developer in the digital space. Since we're just getting started with this nascent industry, sometimes best practices can be hard to come by. Fortunately, we were able to pick the brains of over 30 experienced optimization experts with decades of cumulative experience running A/B testing and optimization campaigns.

ATTITUDE FOR TESTING

Whether you're testing on your own or embarking on a journey with your teammates, setting proper expectations for your optimization program is essential to your success. Remember with each winning, losing, or inconclusive experiment that you're learning each step of the way.

Don't Get Too Excited With a Test's Initial Results

Whether you work at an agency or in-house at a company, it's important to not get excited too early about the initial results of a test. Expressing this to clients or internal stakeholders can easily lead to disappointment if the test's final results are not as spectacular as originally thought.

Managing expectations may not be directly related to website optimization, but it's an important part of the overall process — especially when trying to get buy-in for larger tests.

— *Shawn Joshi*
VOVIA MARKETING

TWEET THIS

Failure is Not an Option

... Er, actually it is. Even with inconclusive results, a test designer's nemesis, you're learning something. Let's be honest, no matter how much of an "expert" you think you are, it's unlikely you're going to get it right 100% of the time. Test, Learn, Rinse, Repeat.

— *Simon Herron*
POSSIBLE

TWEET THIS

EXPERT TIP

Be Prepared to Run Many Rounds of Tests for Each Page

You created a variation, and tested it against a control.

Now what?

Analyze the variations, the results across segments, and improve your hypothesis. Then test again! ***Iterative testing is the name of the game***. Be prepared to run many test rounds for each page. The odds of solving every problem with the first test are slim! Ten tests to a sizable win is more like it.

Analyze each test result, update your hypothesis, and test again.

— Peep Laja
CONVERSION XL

TWEET THIS

Be Prepared to Be Wrong

Testing can challenge our preconceived ideas about what works. Have the courage to admit you're "wrong" when the experiment results don't back up what you "know is right."

Split testing is about gathering actionable information, not wins versus losses. A loss can just as easily tell you what NOT to do and thus avoid doing damage to your site. Every experiment is a win in terms of gaining insight.

— Matt Beischel
KALIO COMMERCE

TWEET THIS

Use Your Losses as Inspiration

It is common knowledge you can't win 'em all. Knowing and understanding the value of those losses is where some great wins come to light. The business of CRO has never been, and never will be, based on assumptions. We take industry best practices and analytical data in combination with business goals and objectives to formulate testing hypotheses. Sometimes, the outcomes of the these negative results lead to additional questions, additional insights, and additional areas to test. It is from these losses we truly can work toward some incredible wins.

— *Kendall Giglio*
ELITESEM

TWEET THIS

A Negative Test Result Can Be a Good Thing

When a test is based upon thorough research and a clear hypothesis, you learn about your audience with every test. I always segment the testing results per device type, browser, traffic source and new/returning visitors. Sometimes the average uplift isn't the best metric to examine. In some cases or a huge lift can be found by segmenting the results, and you can find the true winner. In my experiences, we've implemented a winning variation for tablet traffic only and seen a huge conversion lift.

— *Gijs Wierda*
CATCHI

TWEET THIS

Investigate and Learn

If you get results that you didn't expect, dig around to see if there were any factors you did not account for (for example, another group within the company added a promo offer during the test.)

— *Yusuke Tomizawa*
CONSUMER.ORG

TWEET THIS

Patience, Patience, Patience

Have patience—with the process, the results, the platform you're using, but most of all, patience with yourself.

The pressure will seem enormous at times. No doubt you've heard and read stories about fantastic gains that have come about from conversion rate optimization. What you probably haven't read about are the CRO tests that caused conversion rates to drop. These are tests that despite strong research, hypothesis, and implementation caused conversion rates to plummet. This happens.

Stay with it and have patience. Your business, career, and client will be better for it.

In the online world, conversion rate optimization is still in its infancy. Stay with it, my friend. You're on an exciting journey.

— *Keith Lovgren*
ELEVATED.COM

TWEET THIS

EXPERT TIP

Tests Lose all the Time, and it's Okay—It's About Learning

Some say only 1 out of 8 tests wins, some claim 75% of their tests win.

Always test a specific hypothesis! That way, you never fully fail.

Some people indeed fear that a "losing" test would mean you did something wrong, and because of that your boss or client will not be happy with the performance. Doubt and uncertainty start to cloud your thought process. The best way to overcome this is to be on the same page with everyone. Before you even get into testing, get everyone to together and agree that this is about learning.

— Peep Laja
CONVERSIONXL

TWEET THIS

TAKEAWAYS

- An optimization realist doesn't expect every experiment to win. Remember, failure is an option.
- More than being an option, let your losses inspire you and your team to dig deeper, learn something new, and be proven wrong.
- Testing a specific hypothesis ensures that you will always learn something from an experiment.
- Let experiments run their full course, and don't be swayed by early conversion rate lifts that may not hold over time.
- Patience, patience, and more patience will help you and your team build a lasting optimization program.

GETTING STARTED

"Before anything else, preparation is key to success."
— *Alexander Graham Bell*

Attitude and expectations are part of your optimization preparation, but research, goals, and hypotheses are all essential tools that will make your A/B testing endeavors more successful.

EXPERT TIP

Your Conversion Rate Doesn't Matter

When I speak at conferences, I'm often asked what an "average" conversion rate is. The questioner usually wants to know if theirs is ok or needs improvement. Well, the average conversion rate for websites ranges from 1% to 20%, depending on the industry. Yes, that's a big range, as you should expect.

And it doesn't matter.

Your conversion rate really is irrelevant because there are so many factors influencing it. The traffic segment, product and seasonality (and many more) will all impact yours. For example, I can lift your conversion rate immediately by turning off lower quality traffic, but that might also harm your business.

The only conversion rate that matters is your relative conversion rate in an A/B test.

Let me emphasize that point: Conversion rates are only important for controlled tests.

Most importantly, whatever your current conversion rate is, it can be improved and should be used as your criteria for making your important website decision.

— Chris Goward
WIDERFUNNEL

TWEET THIS

Have Clear Goals and Measure

Aim for solid conversion goals that are important to whatever it is you're doing on your website. It may sound like a given, but it's not.

— Simon Herron
POSSIBLE

TWEET THIS

Understand Your Visitor Behavior Before You Begin

How many visits do you usually get on your pages? What is the standard conversion on your page? It is far better to go into running a test knowing how long you should expect it to take to get the results.

— *Renee Doegar*
LONDON REVIEW OF BOOKS

TWEET THIS

Test in Places Where Goals Are Clear

You will only know that your experiments are achieving your business' needs when you have a clear understanding of how to measure and define success.

Clearly define the goals of your site and the page(s) you want to test. Then, calculate the current conversion rate and by how much you want to improve it.

Inevitably this will lead you away from pages with multiple or confused goals (homepages are a prime example of this.) Product pages and form pages are great places to start. You'll have clear goals and easy measurement, and you'll gain more knowledge and experience.

— *Nick Doran*
PROSPECTS

TWEET THIS

Get Implementation out of the Way Early

It can be challenging to get the testing software implemented with large clients, as the implementation normally goes through a rigorous security and development cycle.

Get your snippet in place early so you have no delays running tests.

— Cornelius Boertjens
CATCHI

TWEET THIS

Set Up a Custom Success Event in Your Analytics

Whether it's form submissions, purchases, or signups, have a custom event set up to measure your experiment across the site. Tie a revenue goal to this event when appropriate.

You should be able to compare these numbers to your Google Analytics (or analytics provider of choice) within a few conversions or dollars. This allows you to track overall conversions over time and to dig into a test's results further in your analytics if needed.

— Brian Schmitt
CROMETRICS

TWEET THIS

Think About What Comes Next

Before starting a test, think about what you will do after the test concludes. Actionable tests trump interesting tests.

— @Adomatica
SHIPSTATION.COM

TWEET THIS

Identify the Purpose of Your Website by Type

In my opinion, there are three types:

1. Informational (think Wikipedia)
2. Entertainment (think YouTube or PBSkids.org)
3. Lead Generation or E-commerce (think Amazon or a SaaS company)

Start testing groups of elements on your most trafficked pages. As you begin to affect change and learn what elements have an effect on your visitors' browsing habits, whittle down your tests to gain greater clarity into what has the greatest impact on your bottom line.

— Jacob Baldwin
ONECALLNOW

TWEET THIS

Understand the Business You Are Trying to Optimize For

If you run through the brand, the competitive landscape and how the company positions themselves before you start then that is really beneficial. One of the first set of tests I recommended to a client went against everything the brand wanted from their website, even though we felt we could increase conversions and revenue by implementing them!

— Joshua Emblin
IE AGENCY

TWEET THIS

State the Expected Outcome of a Test

State your goals and hypothesis before running a test. These statements will help you:

1. Remain Focused: It helps develop the right variation to avoid getting sidetracked and missing the point completely.
2. Manage Expectations: This is especially important if you are optimizing a conversion that is part of bigger process and/or you have many stakeholders to answer to.
3. Validate the Purpose of the Test: When running a test, one thing that you can't alter is time. You need to reaffirm that the test you are running is the best one possible for that moment, as every second wasted leaves sales, profit, and market share on the table.

— Matthew Hayden
CONVERSIONKINGS.COM.AU

TWEET THIS

Keep Actionable Goals and Measurement Tools in Place to Gauge Performance

Does your page get 10 hits a day, 100? 1,000? These "analytics" of scale matter significantly, and if you don't have many visitors, you may have to run tests for a longer period of time. If you have thousands of visitors per day, then proceed with caution: your tests can have significant effects (positive AND negative) on your revenue, browsing experience, and overall performance.

— MrBennyBees
TEMPERATUREALERT.COM

TWEET THIS

TAKEAWAYS

- Set goals and measure for every single experiment.
- Leverage tracking integrations with your analytics to ensure that you'll be able to do robust analysis later.
- Don't stress about benchmarking your conversion rate—focus instead on the relative improvement you'll bring through testing.
- Become intimately familiar with the business you're trying to optimize for: the brand, competitive landscape, and goals.
- Actionable tests trump interesting tests—think about the next steps you'll take after an experiment concludes.

TESTING STRATEGY

Take it from our optimization experts—setting a plan for your A/B tests, knowing when to use an A/B versus MVT, or how to prepare and continuously execute on your strategy can be daunting. Here's what you need to know to get started.

Get started.

— *Vincent Barr*
MONGODB

TWEET THIS

Start Simple

There is often pressure to make tests too complex too fast. Prove you can do a simple test and create your process from there. Then, with a working process, you can begin to build out a testing roadmap that gets more complex and more ambitious over time.

— *Mark Newcomer*
DIGITARIA

TWEET THIS

EXPERT TIP

Leverage Qualitative and Quantitative Data to Inform Variation Design

An effective testing program takes a 360-degree view of your user touch points; consider both quantitative and qualitative data. The quantitative inputs from your analytics dashboard will inform you of where to test, but will offer limited context of why users are behaving as they are. Qualitative inputs such as heat maps, surveys, user testing, and competitive analysis bring the voice of the customer to life.

— *Khattab Khan*
OPTIMIZELY

TWEET THIS

Rely on Data, Not "Best Practices," When Constructing Your Hypotheses

When I first started out in conversion rate optimization, my tests would be based around best practices rather than hard user data. While I was able to achieve some conversion lifts, they were minor and I lacked consistency.

There are so many case studies out there that it can be easy to think a change will work for your website just because it worked for another. The truth is that your users' needs and objectives could be completely different — and that best practice you tested could completely tank on your website.

Once I started constructing my hypotheses around quantitative and qualitative user feedback, my winning percentage shot through the roof.

Instead of relying on common best practices, focus on what your users are telling you through the data.

— *Shawn Joshi*
VOVIA

TWEET THIS

Build Your Knowledge — Of Conversions and Your Company

You need two types of knowledge: conversion knowledge and company-specific knowledge. When learning about conversion, spend just as much time learning about your own company, its customers, its products, and its competitors. Buy and use the products of your clients and their competitors, speak to customers and to the salespeople, read the user guides, and carry out usability tests.

— *Ben Jesson*
CONVERSION RATE EXPERTS

TWEET THIS

Document Your Tests with a Template

Set up a testing template that includes: test name, variations, creative, what you're testing, and hypothesis, research of why it is important, expected outcome, date and duration.

— Matthew Hayden
CONVERSIONKINGS.COM.AU

TWEET THIS

Always State Your Hypothesis

Always state your hypothesis with this template: To determine whether [your proposed change] will increase conversions (and revenue.)

If you can't state your reason for running a test simply, then you probably need to examine why and what you are testing.

— Brian Schmitt
CROMETRICS

TWEET THIS

Keep Your Eye on the Revenue

Make sure you always optimize for (extra) revenue. Don't let yourself be blinded by a conversion lift of the winning variation. A higher conversion rate doesn't always mean a lift in extra revenue.

— Gijs Wierda
CATCHI

TWEET THIS

EXPERT TIP

Build a Foundation for Long Term Success

If I could go back in time and schedule a meeting with myself as I planned my first web optimization experiment, I would say: START SIMPLE!

For a little background, the first test I planned was a multivariate test (3 variations on variable 1, 2 variations on variable 2, equaling 8 total variations) across a multi-page funnel (landing page, homepage, interstitial zip code input, coupon redemption page), that had a scheduled iteration at the midpoint of a 16-week seasonal promotional campaign with hundreds of thousands of dollars of media in market supporting it. I used a multivariate regression analysis to determine which factor we tested was the most impactful.

That test was the first step this company had ever run, and it was doomed to fail due to three crucial factors:

1. It was scheduled as a project, not a process.
2. The tight expected margins of the promotional campaign (the company was already on the fence) set us starting our testing journey at the bottom of a tall cliff named 'ROI.'
3. The complicated build and tightly defined timeline set an inappropriate expectation that testing was a slow, expensive process that takes months to effect change.

Each of these factors could have been addressed by starting simply, with a vision towards the long term.

— *Hudson Arnold*
OPTIMIZELY

TWEET THIS

Know When to Use A/B Or Multivariate Tests

Redesigning a page and changing multiple elements at once doesn't usually increase the likelihood that a test will win. It's much more effective in the long term to change one thing at a time, and then rapidly iterate from there.

Not only does this increase your chances of winning over time, it also increases your confidence in the metrics, and improves your understanding of your customer's needs and motivations.

— Brooks Bell
BROOKS BELL, INC.

TWEET THIS

EXPERT TIP

Use Framework Thinking

The best results in marketing come from approaching problems using framework thinking. The best frameworks allow challenges to be approached in a more rigorous way, opening up new creative options.

At WiderFunnel, we've developed frameworks for every part of the optimization process, some of which we've publicized that you can use too.

To prioritize your test opportunities, you can use the PIE Framework. For analyzing pages to create hypotheses, use the LIFT Model. When you want to test your value proposition, think in terms of the PODs POPs and POIs framework.

— Chris Goward
WIDERFUNNEL

TWEET THIS

Get Your Test to Market Quickly

There can be a lot of hemming and hawing with tests. You want your variation to outperform the original and can tinker all day long trying to create a winning test. The truth is, you just need to launch your test and let your visitors do the thinking!

— Adam Hermsdorfer
BIG TUNA INTERACTIVE

TWEET THIS

Iteration Provides More Value than One-Off Tactical Experiments

A/B testing is easiest when you have a question you want answered. A good question, when answered, will likely spawn other questions and that's what you want, iteration on a test. Iteration provides more value than one off tactical experiments.

— Simon Herron
POSSIBLE

TWEET THIS

EXPERT TIP

Inconclusive Tests are Very Common

If you've reached 250, 350, or more conversions per variation and still don't have a winner, it's usually because the test isn't bold or brave enough in shifting away from the original design, particularly on lower traffic websites.

To understand if there was any impact from the test, analyze the segmentation.

Use Google Analytics to see how the variations performed across different segments—new, returning, different browsers and devices, different traffic sources, other behavioral identifiers. Quite often you will find that one of the variations was a confident winner in a specific segment. That's an insight you can build on! One or more segments may be over and under, or they may be cancelling out—the average is misleading. (Note: in order to accurately assess performance across a segment, you again need a decent sample size!)

If you genuinely have a test which failed to move any segments, it's a crap test. Assess how you came to the hypothesis for the test and revise your other hypotheses as well.

— Peep Laja
CONVERSIONXL

TWEET THIS

QA Your Tests

Test, test, test before launching an experiment!

— Yusuke Tomizawa
CONSUMER.ORG

TWEET THIS

Don't Make a Test More Complex than it Needs to Be

When I began testing, I ran some tests that were aggressive. We would run multi page, multivariate tests which seemed great in principle but inevitably lead to difficulties. Often a click goal or some kind of tracking would not be implemented and the test data would be much harder to discern a result from.

It's easier to break the tests down into the smallest possible pieces. They finish more quickly, with less traffic and a clearer result. Additionally, the implementation takes less time and has a smaller margin for error.

Don't make a test more complex unless there is a very specific need for it.

— Spencer Padway
SELLPOINTS

TWEET THIS

Don't Use the Same Conversion Techniques in Every Situation

You have different techniques for conversion rate optimization at your disposal—use the right one for the job.

When you read a case study describing how a particular technique gave an uplift of 30%, ask yourself why it worked. A risk reduction technique, for example, will work only when the visitors are concerned about risk.

— Ben Jesson
CONVERSION RATE EXPERTS

TWEET THIS

Set Your Testing Plan with Data

Figure out what you want to be testing from the next three months to the next year. It may seem crazy to think that far in advance, but it can be especially helpful if there are complicated tests you want to run and your developer has lots of projects, or if your site offers a product or service that is extremely seasonal.

We set the strategy by gathering data from various tools such as Google Analytics and Crazy Egg, and then figuring out all of the areas that currently need help. Next, we do several types of rankings, such as which tests will involve the most time to implement, which ones will likely have the most impact, which ones will run on pages with the highest priority, etc. Then, based on the rankings, we can determine which tests should be implemented at what time.

If we know the development team is backed up with other priorities, we can implement simpler tests that should still have a decent impact. If a client has code freezes on certain pages during holidays or other busy seasons, we use that time to run some of the smaller tests on lower volume pages.

It's also important to revisit your test plan periodically in case site metrics have changed or new priorities have come up.

— *Angela Fabek*
FATHOM

TWEET THIS

Allow Time for Post-Test Analyses

Expect to spend a lot of time analyzing the results to make new hypotheses and assumptions about your customers. A test win or loss can tell you a lot more than just "this feature works" or "this feature doesn't" and is only worth the effort if you learn something new about your customers.

— Megan Bush
BLUE ACORN

TWEET THIS

Iterate on the "Build-Measure-Learn" Feedback Loop

You can alleviate the dangers of a poorly implemented test by testing frequently. Also, the more you test the better you understand the whole process, and the more you will learn about what your customer wants. Because understanding what the customer wants is paramount in creating a product, you will bring more value to the project the more frequently you complete the build-measure-learn loop.

Remember to do your homework, pausing to think before deciding what to test next.

Don't just rely on gut instinct, although this is a valid way to add to your pool of test ideas. Use analytics, user testing, heat maps and survey tools to understand your visitors and wisely prioritize tests, otherwise you'll not see enough winning variations. A high ratio of winning variations improves ROI from your testing program and keeps clients motivated.

— @drieggs

TWEET THIS

Don't Let Results Become Stale

The best way to communicate today may not be the best in 6 months. Retest previous results a few times a year to make sure your site is optimized for your current market. Focus on the results that didn't win by large margins. But don't forget to retest your clear winners once a year too.

— *Matt MacDougall*
ROCKET WEB

TWEET THIS

Go Big or Go Home

It's definitely not always the case, but if it's your first time testing you need to know that the bigger and more grandiose the changes you make to your site/page the more likely you are to come out with some kind of learning or insight about your audience.

— *Simon Herron*
POSSIBLE

TWEET THIS

TAKEAWAYS

- It's all about the data: don't blindly follow 'best practices' and try to run someone else's winning experiment on your website expecting the same outcome.
- Use quantitative and qualitative data together to uncover experiment ideas.
- Set your team up for lasting success by keeping initial tests simple and getting them to market quickly. But don't forget to QA your experiments!

STATISTICAL SIGNIFICANCE

Measurement of A/B tests goes beyond calling a winning or losing variation. Remember that your test is helping you to make a prediction about the future performance of your website based on past events; it's not perfect. Understanding the statistics behind your tests can give you the confidence to move forward and assess whether to implement or deploy a winning variation.

Learn the Nuances of Statistical Relevance

When I was very new to testing, I thought 20 conversions sounded like it beat 8 conversions. Make sure your testing software supplies statistical likelihood of a winner for you.

Use a tool, like a sample size calculator, to educate potentially confused colleagues, who may not understand why something that appears to be a winning test may not yet be so.

— Renee Doegar
LONDON REVIEW OF BOOKS

TWEET THIS

Understand Your Baseline Conversion with an A/A Test

When we started testing, we ran A/A tests on our main funnel pages for several weeks (alongside running some early tests) so we could capture good conversion stats for the main transactions we would use to decide winners. We then recorded these page by page with corresponding baseline conversion percentage and the sample size needed to call a winner based on a relative lift in conversion using Minimum Detectable Effect. (Check the Optimizely Sample Size Calculator for the numbers.)

This has given us a good basis for a sound testing methodology that we can defend when asked to justify winning or losing tests. This approach also allowed us to create a calendar of tests so that we know reasonably well when tests will start and finish so that planning and scheduling becomes easier.

— Rhys Morris
EXPEDIA.COM

TWEET THIS

Beware of Errors

Statistical Significance is important to understand because you need to control your Error Rate: this is the chance you are probably making a Type I or Type II error.

Type I — Say there is an effect when there is not

Type II — Say there is not an effect when there is

Set your testing program up with these steps:

1. Define a primary goal. Click on a button, view of a certain page, etc.
2. Benchmark your primary goal clickthrough rate or conversion rate.
3. Determine the required sample size using a calculator. Choose your statistical power and significance level (how confident you want to be) and input your baseline conversion rate and minimum detectable effect (MDE.)

   You now have the required sample size by branch. For two branches (control and variation), multiply the number by two. That's the amount of visitors you need for your experiment. If you stop the test before you reach the sample size, you have a higher chance of making a type I or type II error.
4. ***Ask yourself:*** Do I really expect this MDE with this variation? Can I have this volume of traffic on the page that I'm testing?

Yes: Go ahead and test. Stop the test only when you reach the required sample size. If you see you didn't reach the MDE but are close and results are consistent, re-calculate sample size and extend your test. If you failed to reach MDE, it's fine. The variant is not causing the expected effect, or it is causing an effect that is too small to be detectable.

No: You don't have enough traffic for that MDE. Re-think the test and make a bigger change on the variation, one that you would expect to cause a higher MDE. Re-calculate required sample size. Do you have

traffic? Iterate: no matter how much traffic you have you can always test.

If you want to be even more rigorous, test the same experiment three times and check: were the results consistent? You've got yourself a win.

— *Joao Correia*
BLAST ANALYTICS & MARKETING

TWEET THIS

Don't Double Count Your Traffic

If you are starting a new split test on a page that's had a decent amount of traffic prior to starting the test, (or you have a business website with repeat visits as a large portion of your traffic,) you'll need to consider that it can take a week or so before your test results are not biased. Allow your statistics to normalize over a few weeks before determining a winner so you have enough mix of new unique visits to the page versus return visitors that are being counted as 'new' outside of your testing software's awareness of the experiment.

Why? Well if you think about it, if your regular visitor has visited a page, and now on their return they are seeing one of two versions you've just started testing, a few things can skew those results. One example to consider: They've already seen the content and possibly already performed the call to action you are testing. But now you are considering that visit as no conversion in your experiment metrics even though it shouldn't be counted at all.

— *David Garfield*
INTRONIS

TWEET THIS

Understand the Meaning of Chance to Beat Baseline

Especially if you are not familiar with statistics, the very first thing you need to understand is the meaning of "Chance to Beat Baseline": focusing on the error interval more than on the result itself. That's what every kind of science is about! A/B testing is not coin-flipping.

Learn how to read the results before even starting to think about the experiments you want to run. Data are gathered to be analyzed: you don't need experiments just to show off some fancy percentages. Define your sample, wait for the "Chance to Beat Baseline" to be stable and never stop an experiment as soon as you reach the 95% confidence level. Give it time, and it will give you both precise and accurate results.

— Alessio Romito
21DIAMONDS

TWEET THIS

TAKEAWAYS

- Although an experiment's improvement may seem large, examine the number of conversions within each variation; the difference between these numbers may not always be statistically significant.
- A/A tests can help to ensure you're tracking your baseline conversion rate accurately as you begin your experiments.
- Beware of the possibility of error in your experiment. These are most commonly referred to as False Positives, and are conclusive test results when a difference doesn't actually exist. Use a sample size calculator to make sure your run your test with enough data to make an accurate decision.

TESTING CULTURE

More than any one tactic, building a company that thinks experimentally makes optimization and testing stick. Try some of these educational, persuasive, show-not-tell tips to build your own unique process.

Run Five Tests In Your First Two Weeks — Then Share

I ran about five quick tests in the first two weeks of getting Optimizely set up, and then gave a presentation for all the technical and product teams. I showed what worked, what didn't, what insights were gained, and some ideas for future tests leading on from the initial ones.

It got a lot of people excited about the possibilities, and I overheard one of the developers saying to the other, "You see, I told you that the fixed bar was a good idea!" It was clear that the team understood that they could test things in future.

— Tim Gregory
PROPERTY24

TWEET THIS

Educate the Organization About the Process

Running a few tests and getting some quick wins is great, but if you're trying to get broader buy in and get the entire company to make better data-driven decisions in the long term, you need to be ready to explain and teach the methodology. That includes how to generate strong hypotheses, prioritize testing efforts, interpret results, iterate quickly and are willing to take risks and challenge assumptions. If you can do that everything becomes much easier, and you'll be able to affect long-term change.

— Arun Sivashankaran
FUNNELENVY

TWEET THIS

Host a Regular Meeting with this Format

Once every week, host a testing meeting with three agenda items:

- Reviewing last week's results
- Brainstorming new tests
- Prioritizing this week's tests
- Nothing else

First, go over the results from the previous week's tests. Look at what worked and what didn't. Try and draw inferences on why some tests were successful and why others were not.

When reviewing results, treatments should be printed on large board, predictions made, and the results dramatically unveiled. This should be fun. Winners should be cheered, losers jeered, much trash talking should ensue. Don't skip this; this experience is what people will remember 10 years from now. This is the part where you are creating stickiness.

Second, brainstorm ideas for next week's tests. Put your team to work and get them generating ideas for the next round of testing. Often the ideas are refinements of the previous week's test, but it is also healthy to hear a few out-of-the-box ideas. Facilitate the discussion to encourage participants to be specific.

Finally, prioritize the tests to run this week. From among the shortlisted ideas, select the highest potential to test. When prioritizing candidates, rate them on potential to increase returns, and ease of implementation.

If you create a testing culture, where everyone is excited to contribute ideas and see them tested, then the results will come. Creating culture takes a little longer, but getting everyone else on board leads to greater and more enduring growth. It is also a whole lot more fun.

— Gajan Retnasaba
SPIRALYZE

Incorporate Many Perspectives into Optimization

You may think you have plenty of great ideas to test, but you risk missing out on many different perspectives.

- ***Web developers*** will have a view of what they feel would work better in the online purchase path.
- ***Product managers*** will have ideas focused on how to validate what will make their product better.
- ***Salespeople*** will have ideas around what will improve their process.
- ***Designers*** will have ideas on how layouts and color can influence the experience.
- ***Content writers*** will have ideas on what text should be put forward, above the fold, or highlighted.
- ***Interns*** will have new ideas, not biased by working for a long time for the same business.
- ***Senior management*** will want to test toward a vision of where they think the business should evolve.

The list can go on, based on where you work and who you involve. You, as the optimization platform user or owner, don't need ideas; you can get them from all over your business.

— *Chris Sonn*
ALLIANZ

TWEET THIS

Get Buy-In

Get the organization to buy into a culture of formal testing and experimentation. Everything else you do will be that much easier.

— *Tim Gregory*
PROPERTY24

TWEET THIS

TAKEAWAYS

- Sharing and education are paramount to building a testing culture.
- Try a process of regular meetings, brown bag lunches, and publicizing experiment results to gain team-wide buy-in for testing.
- Try out a ready-made meeting format once a week. Remember; these meetings should be run and encourage engagement. Make testing sticky!
- Incorporate perspectives from across the organization when brainstorming and planning for tests. Developers, designers, customer support and many other roles will have unique insights for optimization.

EXPERIMENT IDEAS

For many experimenters, knowing what to test can be the hardest step. Fear not—we have many suggestions for you. Soon, you'll need our recommendations on prioritization to help process the overwhelming number of ideas you and your team have brainstormed.

Build a Catalogue of Testing Ideas

When I first got started with optimization, the excitement for testing and the potential to make a difference was quickly replaced with a feeling of being overwhelmed with the sheer volume of testing ideas that started flowing in. In order to regain a sense of order, I developed the framework of a testing catalog to capture all of those ideas for future use.

The testing catalogue become a living list of testing ideas, from initial ideas for small tests, to tests requested by executives, to data-informed test ideas delivered from our analytics team. Each test in the catalog had a mocked up UI of the test treatments, overall purpose, key observations, the potential opportunity to impact revenue, and success metrics used to measure the results of the test.

The catalogue provided much-needed structure and ensured that the tests were developed exactly as we envisioned them to work.

— Jason Thompson
33STICKS

TWEET THIS

EXPERT TIP

Specific Execution Matters

Let's say you're trying to optimize for clarity. You re-write the body copy, headlines and CTAs. But no lift. You might think: "Clarity is not an issue here." But there's also a good chance that the changes you implemented were still not clear enough. Try another test, using voice of the customer in the copy—the actual language they used in the surveys.

— Peep Laja
CONVERSIONXL

TWEET THIS

Keep an Eye on the Competition

Check what your competitors are doing differently from you, then use those observations for inspiration. Keep your eye on other peer companies who are doing well and see if your customers respond to similar sorts of colors, layouts and content (but obviously keeping within the look and feel of your brand.)

— *Lauren Griffin*
WEBJET

TWEET THIS

Speak to Your Visitors — With Copy

Copy and messaging are an essential place to start optimization and get some wins. Everyone seems to want to try red versus green buttons because they read about it in a blog post somewhere. It's really about trying to help site visitors solve their problems or find what they're looking for, and that is often accomplished with messaging, starting with the headline.

— *Chris Neumann*
CROMETRICS

TWEET THIS

Talk to Your Visitors

In the world of Conversion Rate Optimization, everyone has their own opinions about what to test, what works, and what does not work

In reality however, we are all wrong. The people who truly know what needs to be improved on your website are your real-world visitors, the ones that are looking to achieve THEIR goals on your website; not the goals laid down by management.

By engaging with your visitors, you can gain insightful feedback about the pain points they suffer, whether that be issues with the website, lack of understanding about what you offer, or questions that are left unanswered in your copy.

Tools such as Qualaroo allow you to start obtaining this feedback in a matter of minutes, allowing you to prioritize your testing and begin generating hypothesis that solve real customer problems rather than perceived ones.

A good CRO will put the visitor first!

— David Shaw
VOUCHERCLOUD

TWEET THIS

EXPERT TIP

Seek to Understand the Human Mind

Much of what we do in Internet marketing seems so innovative, and we get caught up in the technology. We run around after each new shiny object - thinking that each one will be a game-changer.

What we should focus on instead is the unchanging nature of our consciousness, awareness, and the "wetware" operating system. With recent advances in neuroscience we are finally mapping this last frontier — understanding more and more about how people make decisions, including the shortcuts and biases that are built into our brains.

Having a deep knowledge of neuroscience and psychology allows us to make much better-informed decisions about how to apply the latest tools and techniques to the brains of our web visitors to get the desired results.

— Tim Ash
SITETUNERS

TWEET THIS

Ask Better Questions

The online environment is replete with quantitative data, which is a good thing and I absolutely encourage. However, there is also a lack of qualitative data. Even when people talk about qualitative data, they often mean heat maps, surveys, and things like that. Again, good tools.

However, nothing can beat the raw, unpolluted, literal voice of the customer. What do your people literally say about your product? The messier and less structured the data, the better. Patterns will emerge, usually surprisingly quickly. It's only when you uncover your customers' real concerns that you can start running the right tests to address them.

— *Mark Baartse*
FIRST

TWEET THIS

TAKEAWAYS

- The number one recommendation from our experts: speak to your visitors, and replicate their language in your copy.
- Even if you're already talking to customers, strive to ask better questions and dive in even deeper with the goal
- Competitors and peer companies can serve as inspiration for optimization, too.
- Once you've generated a backlog of ideas, use a catalog to structure and prioritize your experiments.

ADDITIONAL RESOURCES

The learning doesn't stop here; there are many resources (some which were penned by experts in this guide!) that can guide you throughout your optimization journey.

Join an Online (or Offline) Community

I think it's useful to join communities of other testers where you can find them, and learn from other people's successes.

— Renee Doegar
LONDON REVIEW OF BOOKS

You Should Test That by Chris Goward

For great offline reading, I recommend, "You Should Test That" by Chris Goward. Don't worry, it's not stuffy or boring, but it does contain all the nuts and bolts of a good testing program. It will get you excited. Have at it and happy testing!

— Keith Lovgren
ELEVATED

The Lean Startup by Eric Ries

A lot of extremely valuable information on testing can be gained from Eric Ries' "The Lean Startup." If you haven't read it already, I would highly recommend reading it.

— @Drieggs

Join the Optiverse!

A space for experimenters to unite, explore, & optimize.

GET STARTED

To learn more about best practices for people, process, and technology for a winning optimization strategy, download a copy of Optimizely's
Roadmap to Building an Optimization Culture

Optimization can be instrumental in improving the performance of your paid search funnels. Learn how to maximize your marketing ROI by reading
Optimizing Your Conversion Engine: Search Engine Marketing

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Optimizely

ABOUT OPTIMIZELY

Optimizely is the world's leading optimization platform, providing A/B testing, multivariate testing, and personalization for websites and iOS applications. The platform's ease of use empowers organizations to conceive of and run experiments that help them make better data-driven decisions. With targeting and segmentation using powerful real-time data, Optimizely meets the diverse needs of any business looking to deliver unique experiences to their visitors.

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