



CLICKAWAYS

The Top 200 Takeaways From Click Summit 2015



Click Summit is the premier event for enterprise brands building world-class testing and optimization programs. Every year, leading experts in testing, optimization, and digital analytics meet for a unique, private event. Click Summit 2015 was no different, bringing thought leaders to Raleigh, NC for a series of intimate, candid conversations.

Throughout the summit, several themes emerged including the importance and challenge of personalization, the need to build organizational buy-in and a more data-driven culture, the difficulty of multi-channel attribution and visitor tracking, and the sometimes slow process of growing a testing program. These themes represent the concerns of a growing number of professionals spanning all industries — and the solutions they have developed represent true business innovations.

Whether you attended Click Summit 2015 or not, you can still share in some of these insights. Following are more than 200 takeaways you can use to improve your own testing and optimization program.



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RESERVE YOUR SEAT AT CLICK SUMMIT 2016!

We’re thrilled to announce that Click Summit will be returning to The Umstead Hotel and Spa in Raleigh, NC! Save the date for May 18-20, 2016! Request an invitation for the opportunity to attend this exclusive conference.

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Conversation 1

How Does Testing Impact The Entire Customer Lifecycle?

Led by Eric Allen, Sr. Manager, Testing, Optimization & Digital Analytics, Ancestry.com

Most experiments strive to improve conversion, but what happens after this initial interaction? Answering this question is critical for proving the long-term value of testing and it leads to a deeper understanding of the customer, too. This session focused on specific techniques for creating a testing ecosystem, one that provides a complete image of the customer lifecycle.

Top takeaways from this session:

1. Conversion is a great, immediate metric, but it diverts focus from the entire customer lifecycle.
2. Every visit to a site is an opportunity to create future customers.
3. A win in raw conversion should be tempered by changes in product mix and value.
4. First-time purchases should be viewed as trials with a brand.
5. True loyalty customers are unique — they behave and convert in dramatically different ways.
6. Impacting conversion is relatively straightforward. Comparing various winners to a holdout may help understand long-term impact.
7. Analyze visits and visitors differently; the visit goal is conversion, the visitor goal is a more profitable lifecycle.
8. For subscription services, you can optimize for acquisition or improve the experience of the customers you already have.
9. A test can have one effect on conversion and a totally different effect on brand perception.
10. Qualitative research can provide insight into what customers think and why they behave the way they do.
11. A flat test isn't a loser if it affects your brand in the right way.
12. Every interaction influences the customer. 
13. Attaining equal conversion rates on desktop and mobile shouldn't be the goal. Building a chain of touch points leading to conversion should be the goal.





Conversation 2

How Can We Empower Executives Through Testing?

Led by Scott Calise, Senior Director of Digital Research, Viacom Entertainment Group

Successful testing programs require some degree of executive buy-in. This support is essential if the testing team is going to have the freedom to experiment and grow. But beyond tacit support—approval of a tactical process that generates results—testing can achieve much more by working to empower key executives. This session considered the benefits of this approach, some of the problems caused by increased executive involvement, and the challenges of deepening engagement with top-level decision makers.

Top takeaways from this session:

1. For testing programs, the executive is a person who decides what deserves focus and what doesn't.
2. The executive is the resource allocator.
3. Be sure to ask yourself: Does testing exist because of an executive?
4. Consider reserving traffic for executive testing including pet projects, proving hypotheses, and risk reduction tests.
5. Emphasize the purpose of testing through transparency, not the speed at which testing can be accomplished.
6. Ensure results are accurate and verifiable before sharing.
7. Meet with executives regularly to share summaries of results.
8. Use examples of other, more traditional, approaches—like testing store layouts—to build buy-in.
9. An easy-to-use knowledge base is a powerful tool for building executive buy-in.
10. Understand what results are most important to executives—this could be a KPI or demonstrated reduction in potential losses.
11. Provide an opportunity to ask questions, contribute ideas to the test roadmap, and participate in the process.

Be sure to ask yourself: Does testing exist because of an executive? 



Conversation 3

Making Quantitative And Qualitative Data Work Together For Deeper Insight

Led by Sandy Chen, Senior Manager, Web Optimization & User Research, Autodesk

Thanks to an increasing variety of tools capable of measuring user behaviors online, most testing teams are awash in data. And this information can be combined and separated, analyzed and interpreted in many ways, relatively quickly. But there are certain questions no amount of quantitative data can answer. For testing programs to continue to grow—to continue uncovering deeper insights about their customers—they must leverage qualitative data as well. In this session, we discussed the various types of qualitative data commonly available to testing programs, how to effectively make sense of this data, and how it can best be integrated with more commonly used quantitative methods.

Top takeaways from this session:

1. Complex business questions require qualitative and quantitative data to find an answer.
2. Quantitative data tells us what happened, qualitative data tells us why. 
3. Even if a test generates a lift, would you be confident pushing it to production if you didn't understand why?
4. The challenge created by qualitative data is determining how to leverage the insights.
5. Most organizations focus on capturing qualitative data, not building a plan to analyze it.
6. Qualitative data can help you understand why a variation didn't win.
7. Conducting user tests can inspire A/B tests.
8. User testing identifies problems; A/B tests evaluate possible solutions.
9. Integrating qualitative insights into reports helps tell the story in a more compelling, human way.
10. Too often, there is little coordination between qualitative and quantitative research.





Conversation 4

Looking Beyond Test Velocity: Rethinking The Ways We Measure Program Health

Led by Robin Chiang, VP, Product Measurement, Testing & Intelligence, First Data Corporation

Going from 20 tests in 2012 to 100 in 2013 was a challenge. Launching more than 400 tests in 2014—and setting a plan for more than 1500 in 2015—forces you to redefine exactly what “test velocity” really means. Volume is always impressive but speed—the pace of iteration—can actually produce greater results. For some organizations, velocity may be judged by contribution to total learning or a combination of volume and quality. The point, however, is to establish a meaningful measure of program health that can be used to set goals and evaluate growth. In this session, we discussed velocity and other measures of program health, sharing our own experience creating these metrics—and struggling to achieve success in the face of them.

Top takeaways from this session:

1. Early stage programs should focus on test volume as their KPI.
2. When testing becomes more advanced, quality and consistency becomes the KPI.
3. Eventually, revenue impact can be used as a testing program KPI.
4. Maintaining an accurate knowledge base must be part of the testing team charter.
5. The knowledge base must centralize documentation, results, and learning in a practical, searchable way.
6. Report program success and status quarterly; adjust the story to suit each audience.
7. Always be transparent—report flat tests and losses along with wins.
8. Schedule a “road show” to present the value of testing to each business unit.
9. Get stakeholders from different departments together to discuss testing.
10. Don’t waste time debunking anecdotes or settling arguments through testing.

When testing becomes more advanced, quality and consistency becomes the KPI. 



Conversation 5

Why The “User-Centric Promise” Is Not As Easy As Your CMO Thinks

Led by Adam Corey, Senior Director, Product, Tealium

The wide adoption of mobile and other devices has provided even more data that can be used to understand users and create experiences tailored to their individual needs, interests, and behaviors. But too often, “omnichannel” solutions end up being methods of delivering the same message across multiple channels and devices. This is understandable — creating a truly user-centric experience is costly and resource-intensive. This discussion focused on the strategies and tactics for leveraging the entire data ecosystem to create testing strategies that customize interactions across any touch point.

Top takeaways from this session:

1. One of the greatest challenges facing marketers is tracking users as they shift devices. 
2. Third party data and data management platforms can triangulate users.
3. Bridging the attribution gap is the biggest promise of beacon technology.
4. Few testing programs have the resources to manage native app testing.
5. Measuring native app success is difficult because no performance baseline has been established.
6. Building tests to answer business questions leads to a deeper understanding of the customer.
7. A combination of qualitative and quantitative data creates a complete understanding of the customer.
8. Customer lifetime value serves as a better omnichannel KPI than simple conversion.
9. Ensure testing priorities are aligned with program capabilities.
10. Identify realistic goals, then work to gain executive support for them.





Conversation 6

What to Do When Test Ideation Hits a Wall?

Led by Crist Costa, Director of eCommerce Solutions, Patagonia

The situation is common: After months of hard work on a complete redesign, the new site launches amidst much excitement. But after a few weeks a worrying trend emerges. Maybe it's an increasing bounce rate on the homepage, a precipitous drop in average order value, or a ballooning number of abandoned checkouts. A frantic series of testing ensues and though every idea—best practice and otherwise—is applied, nothing seems to turn the tide. This session explored this scenario, provided an opportunity to share what has worked and what hasn't, and discussed possible strategies and solutions.

Top takeaways from this session:

1. Strive for 80% of tests to be iterative and data-informed, 20% to be imaginative departures that avoid best practices and conventions.
2. When struggling with a poor-performing redesign, consider reverse testing certain elements to pinpoint the deficiency.
3. If you're against a wall, be sure to ask for ideas from other teams in the company.
4. When tests consistently fail to win, start looking at segments more granularly.
5. Get a group together for a critique with the goal of creating a long list of problems and annoyances.
6. Combining user testing and A/B testing leads to powerful results.
7. A great idea can come from anyone—make sure there's a way to share the inspiration.
8. Consider cursor tracking and session recording to gain a new understanding of user behavior.
9. Customer service transcripts provide valuable insight into the features of a site customers love and those they can't stand.
10. There are no business problems, only customer problems.

There are no business problems, only customer problems. 



Conversation 7

The Challenges and Opportunities of Customer Centricity

Led by Peter Fader, Author of Customer Centricity: Focus on Right Customers for Strategic Advantage

Every business wants to focus on customers—but focusing on the right customers is an intentional decision that underlies a strategy focused on nurturing the individuals most valuable to an organization. In this session, we explored the specific metrics, tactics, barriers, best practices, and other essential considerations for implementing a truly customer-centric strategy.

Top takeaways from this session:

1. Customer lifetime value (CLV) is the foundational measure of satisfaction and success.
2. Calculating the CLV accurately allows businesses to focus on their most valuable customers.
3. Testing helps identify ways to increase customer value and push more customers into the most valuable group.



4. Customer equity can act as a proxy for corporate valuation—or at least for the value of marketing.
5. Analyze data first, then develop a model, and finally use experimentation to test the model.

Customer lifetime value is the foundational measure of satisfaction and success. 

6. A predictive model of customer behavior could drive business strategy—testing would verify and improve the model.
7. Customer lifetime value could replace “cost per acquisition” and unites retention and acquisition in the process.
8. The basic measure of customer lifetime value relies on the recency, frequency, and monetary value of each interaction.
9. Establish the basic model, and then consider covariates and confounding variables.
10. Customer centricity is about identifying the most valuable customers and catering specifically to their needs.



Conversation 8

Finding the Ideal Organizational Structure to Support Testing Program Growth

Led by Victor Forman, Director, Site Optimization, Orbitz Worldwide

Whether you're running a handful of tests a year or hundreds there's one thing every successful testing program will eventually face: A need to scale with increasing demand and expectations. And from technology to processes, scaling quickly poses a wide range of challenges. Finding the right organizational structure for your testing team creates an essential foundation for growth. In this discussion we shared some of the benefits and hurdles associated with various approaches to organizing testing teams.

Top takeaways from this session:

1. Establishing a testing "center of excellence" helps maintain alignment across an entire organization.
2. Rapidly scaling a testing program requires dedicated resources and executive buy-in.
3. Managing testing through a center of excellence limits test collisions and consolidates learning.



Decentralized testing encourages participation but makes quality control difficult. 

4. Centralizing all strategy can limit test ideas and reduce organizational buy-in.
5. Broad inclusion in testing prevents experiments that could never be implemented.
6. Decentralized testing encourages participation but makes quality control difficult.

7. Establishing a testing center of excellence requires trust and authority.
8. The testing center of excellence must be experts in design of experiments and advocates of experimental rigor.
9. When building a testing culture, it's helpful to have a single source of communication.
10. A center of excellence is a powerful source of education and resource for onboarding.



Conversation 9

How Do We Maintain Momentum After a Testing Program Launches?

Led by Chris Hall, SVP Digital, Imagitas

When a testing program is first formed, the excitement of learning and winning can create a powerful momentum that nurtures culture and drives teams forward. But as time goes on, and testing results normalize, this enthusiasm can begin to fade. From struggling to impact an immovable metric, suffering through diminished returns, or simply falling into an ideation rut, there are common pitfalls and hidden challenges many programs must face.

Top takeaways from this session:

1. Perform additional analysis to identify and understand the immovable metrics.
2. To spark enthusiasm, set big goals like launching 10 new tests in 10 days.
3. Report complete test information, but make it easy to extract key takeaways.
4. Host testing town hall meetings to share progress, answer questions, and hear new ideas.
5. Make it easy for people to submit test ideas with a central intake form.

Host testing town hall meetings to share progress, answer questions, and hear new ideas. 



8. Build an internal test knowledge base, and then promote its value.
9. Reserve a portion of the test queue for stakeholder test requests.
10. Keep strategy meetings small, focused, and productive.

6. Let everyone vote for the test variation they think will win, then keep a scoreboard.
7. Balance high level of effort tests with quick and easy tests.



Conversation 10

Optimizing (Or Even Building Out) Optimization Tools

Led by Dylan Lewis, Director, Analytics and Experimentation, Intuit

As testing programs grow, teams run into barriers and challenges with limitations of off the shelf optimization tools that impact the testing program. From not having item-level details for every conversion to using one-tailed tests for significance, there are inherent challenges with every tool we could use. Testing teams demand highly specific tools to meet their (often not) unique needs and processes. If the mismatch grows large enough the solution may be to build and develop custom tools.

Top takeaways from this session:

1. Building a tool makes it easy to add custom features or capabilities—but are these options really necessary?
2. Before considering a custom tool, ask whether your needs are truly unique.
3. Experience with multiple testing platforms is a prerequisite to building your own.
4. Maintaining a custom testing platform requires dedicated development resources.
5. For organizations with more developers than analysts, building tools to streamline the testing process may make sense.
6. Achieving platform stability is important; ensuring data integrity is essential.
7. Sometimes a more robust analytics tool can solve common testing headaches.
8. Integrations with other tools and data sources present a huge hurdle for custom platform development.
9. A custom testing tool may solve one set of problems, but will it cause conflicts with the entire optimization ecosystem?
10. If something breaks, whom will you call for support?

Before considering a custom tool, ask whether your needs are truly unique. 



Conversation 11

Bridging The Gap Between Testing And Branding

Led by Cindy Lincks, VP of eCommerce, Brooks Brothers

When it comes to optimizing transactional experiences — ecommerce sites, for example — the role of testing is clear. And measuring the impact of testing in this context is relatively easy. But when it comes to branding and other marketing initiatives that aren't focused on ROI, testing and optimization becomes much more complicated. This session considered the role of testing in brand-driven marketing campaigns.

Top takeaways from this session:

1. The digital experience is ultimately part of the brand experience.
2. Testing provides a huge opportunity to show ROI for digital marketing buys.
3. Many organizations realize the value of testing after a big marketing failure.
4. A broken site is like putting a closed sign on thousands of stores — and this is bad for both the brand and the bottom line.

Testing can be used to reduce the risk of brand campaigns or site redesigns. 



5. Tailor presentations to the audience; try using images for creatives instead of charts and graphs.
6. If you're selling data to the brand team, what are you buying in return?
7. Establish the expectation that some tests fail, but remember some brand campaigns fall flat as well.
8. Work with the brand team to make guidelines conversion friendly.
9. Testing can be used to reduce the risk of brand campaigns or site redesigns.
10. Usability testing can introduce the idea of optimization and may lead to more support for A/B testing.



Conversation 12

Balancing the Optimization Needs of Two Equally Important Segments, When They're Completely Different

Led by Scott MacMillan, Director, Digital Testing and Optimization, Fidelity

Segmentation provides a powerful tool for optimization but our ability to identify and target distinct groups creates new challenges as well. In organizations that serve new and existing customers, for example, the segmentation that is essential for business growth also creates a distinct set of success metrics, demands different optimization strategies, and gives way to conflicting demands on the optimization program that can require careful political maneuvering to satisfy. This conversation focused on the challenges such segmentation poses for testing programs.

Top takeaways from this session:

1. Segmentation provides valuable insight into trends in behavior – even if each segment can't reach confidence.
2. Look at the difference between segments, not just the performance of a segment on its own.

Target tests to segments rather than simply surfacing them later for analysis. 

3. It's important to think about segments proactively and not just reactively.
4. Target tests to segments rather than simply surfacing them later for analysis.
5. If an individual segment doesn't perform well in a test, ask whether the test was targeted to them specifically.



6. Individual segments need their own, relevant KPIs.
7. Ultimately, more complex segments or personas will be the best driver of test strategy.
8. Think about segments based on position in the consumer decision journey.
9. Creating segments based on user flows can lead to more powerful cross-site tests.
10. Advanced segmentation requires complex analysis and this often means a new tool is necessary.



Conversation 13

Testing Toward One-To-One: Practical Strategies for Improving Testing and Optimization Through Personalization

Led by Phil Medlin, Personalization Analytics Manager, Lowe's

As a methodology, testing provides the easiest and most effective means for improving the performance of a digital experience in a consistent, measurable way. But optimizing for a loosely segmented majority leads to websites that may satisfy the needs of many without providing a great fit for anybody. Personalization offers an opportunity to create more tailored experiences — it also allows us to focus our testing efforts on specific, narrowly targeted groups, reducing dilution effects and leading to more meaningful insights.

Top takeaways from this session:

1. Simply defining personalization is a huge challenge — right now, no one agrees.
2. Machine learning distances you from the customer, makes targeting based on need difficult.
6. As models become more accurate, they become more complex and difficult to use.
7. Consider whether personalization focuses on behavior or propensity, whether it's deterministic or probabilistic.



Simply defining personalization is a huge challenge—right now, no one agrees. 

3. Personalization algorithms may match the person with the right product, but will the messaging or design be optimal?
4. The best solution is still getting users to login and authenticate.
5. Creating and managing assets for personalization becomes a huge challenge.
8. Think about how narrow personalization will impact the QA process.
9. Managing micro-segments can be difficult, especially if winning variations are served through a testing tool and not pushed to production.
10. One-to-one personalization is the end game, there's a lot to learn on the way.



Conversation 14

Can All Channels Lead to Purchase? Developing Strategies and Managing Resources for Cross-Device Shopping Experiences

Led by Victor Ortiz, Director, Mobile Retail Engagement, Toys R Us

Cross-device shopping is changing the way retailers manage both marketing and operations—and testing and optimization programs must respond to this shift in consumer behavior as well. Whether focusing on a mobile app, responsive site design, or cross-channel promotion, we must think about testing strategy in a more holistic way.

Top takeaways from this session:

1. Lots of companies struggle with maintaining testing velocity on mobile.
2. Mobile users tend to be browsing and conducting research, not looking to convert.
3. Though the same users may visit a site on both mobile and desktop, their goals can be different or change.
4. Mobile, desktop, and even tablet tests likely require unique KPIs.
5. Executives want to see conversion, but engagement may be more appropriate for mobile.
6. “Painted door tests” that gauge interest in a feature before it’s built can be a resource-conserving tool—especially for mobile.
7. Using qualitative and quantitative data can help understand the difference between desktop and mobile behavior.
8. Where testing sits within an organization can impact how mobile testing is managed.
9. Coordinating across business units is difficult, but centralized testing teams may find themselves constrained by resources.
10. Responsive sites mean testing on mobile can’t be ignored.

Executives want to see conversion, but engagement may be more appropriate for mobile. 



Conversation 15

How Do You Report Results to Communicate Value and Gain Support for Testing?

Led by Marcie Roth, Director of Testing and Analytics, Vimeo

When a test reaches the desired sample size, it's common to run a report and review the results. Winners are celebrated and losers are noted, then the next test begins. But reporting results is so critical to the testing process, it deserves more attention than a simple review at the end provides. In this conversation, we shared our challenges and successes in using test reporting—both during and at the end of a test—to communicate value, gain support, and attract buy-in for our testing programs.

Top takeaways from this session:

1. Hypothesis-driven test design ensures a clear learning will be generated from every test.
2. Consider recording a video of the user flow through a test experience to be stored in your knowledge base.

Hypothesis-driven test design ensures a clear learning will be generated from every test. 

3. There's a delicate balance between reporting too much information and not telling the whole story.
4. Build the context of the test into the report, including the goal, hypothesis, and customer personas.
5. Unusual events like big storms may be the source of unexpected test results—and should be communicated with results.



6. Communicating the complete test hypothesis and results in one page or slide makes it easy for others to review.
7. Always provide an opportunity to access more details of a test.
8. If tests don't generate an increase in revenue, focus on the "return on time spent" when reporting results.
9. When reporting results, always include next steps.



Conversation 16

Attribution, Causation, and Success: Developing Effective Frameworks to Prove Business Value

Led by George Sadler, Senior Director Marketing, eBay

In many organizations, support for testing and optimization waivers quarter over quarter. The reason is simple: Testing managers fail to demonstrate a concrete, verifiable contribution to business goals. This session explored methods for tracking attribution, proving causality, and developing frameworks and methodologies to validate improvements to sales volume, revenue, and other goals.

Top takeaways from this session:

1. Marketers and creative managers increasingly want analysts to ensure their success is measured.
2. Testing for revenue lift maintains program support; testing for insights captures the true value typically left behind.
3. A testing program must balance incremental learning with big swings at success.



4. If your testing program produces value for the business, make sure everyone knows about it.
5. Sharing one goal between teams is a powerful tool for encouraging cooperation.

A testing program must balance incremental learning with big swings at success. 

6. Technology remains one of the biggest hurdles to effective attribution.
7. When attribution is essential and traffic volume is large, maintaining a holdout group is a great idea.
8. A test and learn approach may conflict with a fail fast mentality — but data will tip the scale in your favor.
9. Analysts that can tell and sell a story are extremely rare and valuable.
10. Testing shouldn't be focused on speed; it should be focused on business success.



Conversation 17

Hello My Name Is Personalization: Building a Foundation for Success and Growth

Led by Mark Simpson, Founder and President, Maxymiser

Personalization is the newest trend in testing and analytics — and though everyone, it seems, is planning to jump on the bandwagon, few know where to begin. Effective personalization requires the implementation of technology, an understanding of the basic approaches, and a strategic plan for modifying and extending existing processes. In this discussion, we explored the major hurdles that prevent personalization programs from even starting — and shared experiences of what has worked and what hasn't.

Top takeaways from this session:

1. Personalization may need a proof of concept before it gains wider support.
2. Start small with personalization — target gender, location, and landing pages.
3. Personalization targeting a specific behavior offers an opportunity to grow the program.
4. Personalization may not contribute directly to an increase in revenue per visitor; be sure to monitor changes in engagement as well.
5. A successful personalization campaign may not have an effect on all users — consider results on a granular level.
6. Try personalization campaigns that shorten the customer funnel from entry to product to checkout.
7. A personalization test can lead to wins in organizational efficiency or some other benefit.
8. Ensure the success metric matches the goal of the personalization test.
9. Create affinity groups through the use of behavioral and qualitative data.
10. If personalization tests target micro-segments, the potential return from each test will be proportionally small.

Personalization may need a proof of concept before it gains wider support. 



Conversation 18

"We Believe in Data": Creating a Cult-Like Culture Around Testing

Led by Jen Towns, Vice President of Marketing, AOL

It's easy to be excited about testing when celebrating a big win, but for testing to thrive, organizations must develop a cult-like devotion to the process of experimentation, iteration, and learning. Achieving this mindset often requires a cultural shift—a process that can be challenging to initiate and even harder to sustain. In this session, we shared our experiences building and growing cultures of testing, highlighting the techniques that have worked and unpacked those that didn't, to develop a better understanding of how a testing program can become a center of leadership in any business.

Top takeaways from this session:

1. To increase support for testing, find the people that benefit most from it.
2. Identify pain points in other departments and find a way for testing to solve them.
3. Executives appreciate testing when it allows them to avoid organizational mistakes and business risks.
4. Create a space for innovation and fun.



Identify pain points in other departments and find a way for testing to solve them. 

5. Offer one "free" test to other teams in the organization.
6. Start small and focus on generating wins.
7. Consistent, small, easy to explain wins generate the early momentum that fuels growth.
8. When a program is new, it's important to keep the scope sustainable and make the process scalable.
9. Recognize your organization's maturity and adjust your strategy accordingly.
10. Creating a testing culture starts with you.



Conversation 19

Estimating Test Recommendation Impact to Prove Testing Program Value

Led by Sasha Verbitsky, Director of Analytics & Testing, Abercrombie & Fitch

Between the initial interaction and ultimate conversion there's a lot of potential for influence, interference, and noise. Capturing a chain of micro-conversions can help prove some causality across the funnel, but judging the impact an early interaction has on the bottom line is a challenge. Deeper analyses and segmentation of test results, coupled with statistical techniques and with sound forecasting and projection methodology helps quantify the impact of test results and extract more value from each test. The ultimate goal is to enable testing managers to derive guiding principles for better estimation of testing program ROI and its contribution to business goals.

Top takeaways from this session:

1. Always report individual results to demonstrate the health of a testing program.
2. Cumulative results make forecasting program health difficult.
3. Don't forget to share insights alongside results.
4. Often, analysis of data must take place outside the testing tool to be accurate.
5. Even big wins have a tendency to decay over time — it's important this is considered when calculating program ROI.
6. Always present conservative values to represent the program's success.
7. When making multiple comparisons, don't forget to adjust your significance calculation accordingly.
8. Many testing programs use a discount factor to estimate the long-term value of a test result.
9. Communicate value through metrics like number of tests launched, variations tested, win rate, learn rate, and others.
10. Sometimes the biggest value testing provides is in avoiding the launch of designs that hurt performance.

Often, analysis of data must take place outside the testing tool to be accurate. 



Conversation 20

How Do We Measure Success When Success Includes More Than Just Conversion?

Led by Shilpa Viswanathan, Manager, Analytics and Optimization, Symantec

Most testing programs focus on “money metrics”—measures of behaviors that directly contribute to or reflect sales. Ideally, these metrics represent or contribute to major business goals—but sometimes, individual metrics conflict with one another. How do organizations manage these multiple and at times conflicting metrics? As optimization practices evolve, metrics must be adapted to fit all the needs of an organization.

Top takeaways from this session:

1. Remember: Not every visitor uses your site for the same purposes.
2. If engagement is low, focus on increasing activity first.
3. Once visitors are engaged, push them toward conversion.

If a test is meant to explore the risk of a new design, a flat result proves the win. 

4. Finance can help develop specific monetary values for every action on the site.
5. Surveys can help untangle customer motivation and identify frustrations.
6. Sentiment analysis, social listening, and text analytics can provide insight into customer attitudes and goals.
7. If a test is meant to explore the risk of a new design, a flat result proves the win.



8. Analyze segments to see how they differ from the average customer.
9. Allow KPIs to change to match the behaviors at the beginning versus the end of the funnel.
10. Customer lifetime value provides a more nuanced measure than conversion alone.



Conversation 21

Can Personalization Scale? Balancing Opportunity With Complexity in a One-To-One World

Led by Naoshi Yamauchi, Chief Performance Officer, Brooks Bell

Personalization promises a more targeted, finely tailored experience for each customer — and the assumption is that these more relevant experiences will improve business performance. But as algorithmic personalization tools create ever-more segments, the marketer or manager is left with an increasingly fragmented view of the consumer. Developing an effective optimization strategy to address the specific, individual needs of each customer may ultimately be impossible.

Top takeaways from this session:

1. The personalization landscape is still fairly immature.
2. Segmentation and targeting may provide a more scalable alternative to personalization.
3. Effective personalization will require a large pool of analytics and engineering resources.
4. Never launch a personalization test to the entire population — test specific segments within swim lanes.



5. The goal of personalization is to determine whether a different experience will result in significantly different behavior.

A/B testing is an essential tool for making machine learning meaningful.

6. A/B testing is an essential tool for making machine learning meaningful.
7. Scaling personalization will require templating of key resources.
8. Cluster analysis is an effective method for identifying groups most suitable for personalization.
9. Personalization is most effective when it increases relevance — this is a narrow and specific objective.
10. You can't start with personalization campaigns until you've intelligently defined the audiences.



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BUILDING A WORLD CLASS OPTIMIZATION PROGRAM? LET'S TALK.

Building an optimization program isn't simple—and advancing one can be even harder. Sometimes, it helps to have an experienced guide to lead the way. At Brooks Bell we help companies using enterprise-level testing platforms to expand their capabilities and scale their optimization programs. Using an iterative testing methodology, we develop a strategy that addresses the needs of each client's customers, their organization, and their business goals. Our proven process is designed to encourage a data-driven culture, improve conversion rates, generate business insights, and increase revenue.

WORK WITH US:

SALES

Tel: 919-521-5300

Sales@brooksbell.com

FOR MORE INFORMATION:

MARKETING AND STRATEGIC PARTNERSHIPS

Tel: 919-521-5160

mktg@brooksbell.com

ABOUT BROOKS BELL

Brooks Bell is the premier firm focused exclusively on enterprise-level testing, personalization and optimization services.

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