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SUMMIT 2016

CLICK**AWAYS**

The Top 200 Takeaways From Click Summit 2016

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 2016 was no different, bringing thought leaders to Raleigh, NC for a series of intimate, candid conversations.

Over the course of two days, attendees discussed the current state of testing, including opportunities for personalization, the challenges of data stitching in an omnichannel environment, and mobile experimentation strategies that work.

Other themes included gaining executive buy-in for your testing program, the importance of effectively sharing testing knowledge among team members, and the immense benefits—and ever-present hurdles—of creating a testing culture.

Underlying it all was a sense of what the future holds for testing: the fundamental value of customer-centricity and the increasing precision of web analytics.

Whether you attended Click Summit 2016 or not, you can still share in some of these insights. Following are the top takeaways you can use to improve your own testing and optimization program.

BROOKS BELL

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Conversation 1

Expanding Mobile Testing Beyond the Dollar

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

Mobile now accounts for 50 percent or more of total digital traffic but only represents approximately 25 percent of total revenue. Limited traffic through the conversion funnel makes it difficult to expand testing that's strictly focused on conversion revenue optimization. But mobile still provides plenty of opportunities for optimization, whether the user wants to find the closest store, check the status of an order, or start a gift registry. Together we looked at mobile testing strategies aimed at growing a testing program while still delivering measurable value.

Top takeaways from this session:

- Qualitative user testing has provided insight that has given some of the biggest mobile test results.
- The maturity of your program will determine when you can move past revenue as a primary metric.
- Perform a deep-dive analysis to show how engagement ties to revenue.
- Combine qualitative data with feedback from your customer service team to get directional insight.
- To take the long view, really nail down the use case for why visitors are coming to your site.

> *Try using a survey to target users who don't convert.*

- Try using a survey to target users who don't convert.
- Start from the brand experience you want to deliver and work toward that.
- Do non-revenue testing earlier in the year. Q4 testing is much more shortsighted and focused on revenue.
- Improve your business by selling the right product instead of more product.
- The extent to which testing is focused on revenue depends on where it sits in the organization.
- Governance is critical to making non-revenue KPIs useful and effective.
- Use different types of data points to justify the experiment before it's launched.
- Determine user intent first, and use it to help prioritize the order of tests.
- Consider how different types of testing should align with different quarters (e.g., holiday, off-peak, summer).

Conversation 2

The Upside of Losing

Led by Eric Allen, Director, Conversion, Ancestry.com

It's the nature of experimentation—not all tests win, and the lessons learned can be expensive. But anyone who's been in the testing trenches knows that it can be more expensive to make business decisions that aren't based on data. In this discussion, we explored the value of losing tests, from mitigating risk to gaining customer insights. We also discussed how to build a testing culture where everyone appreciates the losers—even if they don't love them.

Top takeaways from this session:

- "Stealth testing"—keeping executives or internal team members from even knowing about a test—can be a way to avoid push-back, but it's not for everyone.
- People are often dishonest during user research, so it needs to be balanced with quantitative research.
- Qualitative research helps determine the "why."
- Losing tests take more time than flat or winning tests, because you need to uncover the reason for the loss.
- A lot people call tests too early, either from executive directives or from not knowing how to explain why not to call a test early.
- The most successful programs have members with the "strength of stomach" to keep a test on when it looks like it's losing.

"The most successful programs have members with the "strength of stomach" to keep a test on when it looks like it's losing."

- Learnings are most important—you should aim for a 100% learn rate.
- Internal testing conflicts are common, whether it's an executive who demands shutting off a test or a team member who blames you for losing money from a test that lost.

Conversation 3

Proving the Value of Testing: Measuring after a Successful Test

Led by Michael Vanderhoof, Director eCommerce Optimization, Toys"R"Us

In the world of optimization, getting a positive lift is what we usually aim for—but it's hardly the end of the story. Measuring the expected impact of a successful test after it has been moved to production is key to proving the ROI of a testing program, but many companies struggle with the unknowns. For example, is projection the most reliable way of understanding post-production value? Once you go live with changes that have proven to be successful, what does accountability look like? And with various other factors impacting conversion and revenue, how can you correctly attribute a positive lift to testing? This session was about validating wins on a continued basis in a way that's creative, compelling, and correct.

Top takeaways from this session:

- A "holdout group"—a segment of traffic that isn't exposed to a test—can help you more accurately project revenue.
- Project gains conservatively, using the lower number of the confidence interval.

> *Involve your finance team to make sure you're aligned on methodology for projecting gains.*

- Re-run tests six months later to validate your earlier results.
- Lifts may not remain at the same level because of various external factors.
- Learn the rate at which your tests typically degrade—sometimes called test fatigue—and apply it to your tests to more accurately project revenue.
- Involve your finance team to make sure you're aligned on methodology for projecting gains.
- Consider building in the loss aversion value of a test, such as how much money you saved by testing before building changes into production.
- Use propensity modeling to get a more complete understanding of your customers and prospects.

Conversation 4

Building a Knowledgeshare to Help You Scale

Led by Naoshi Yamauchi, President, Brooks Bell

You can't scale your testing program unless your team can effectively share knowledge. As you add people, change tools, and firm up processes, it's critical to document these changes. But creating a knowledgeshare that is accessible, digestible, and actually used by others can be a challenge. In this session, we talked about systems to house your test analyses and insights—what works, what doesn't, and how to best capitalize on everyone's valuable knowledge.

Top takeaways from this session:

- Everyone wants to stay informed, but stakeholders often struggle with too frequent and highly detailed updates.
- Focus on presenting or storytelling instead of just compiling a repository of data.
- Data input is tedious and difficult to stay on top of—consider using incentives or quarterly goals to manage.
- Templated presentations or forms often make it easier to keep data entry light and fun.
- Visualizations help executives quickly and easily understand the important aspects of the message.
- Having historical information can help advance testing efforts because it shows the testing team what's in it for them.
- Before collecting data about your test, think how you want to slice and dice the information later.

"Visualizations help executives quickly and easily understand the important aspects of the message."

- Make sure you capture the data you need—but not so much that it's a burden.
- Quarterly "roadshows" or "expos" can be an excellent forum for spreading information and telling a story using themes.
- The more a person knows about historical tests, the higher their credibility with senior leadership.

Conversation 5

Driving Efficiency and Scale for Your Testing Program

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

Moving up the best-in-class testing pyramid requires you to ramp up testing volume, but how do you do that? Continually adding members to your team sounds simple, but it's rarely a possibility. In this discussion, we talked about about increasing testing program volume through various approaches, from doing more with less through better collaboration tools to leveraging trusted partners to scale a team.

Top takeaways from this session:

- Human capital—the limitation of resources—is the major hurdle everyone is struggling with in terms of increasing velocity, volume, and efficiency.
- You can help the testing process go smoother and faster by making sure your goals are clear, your KPIs are aligned with your goals, and you have all your test set-up information laid out.
- Standardization in strategy methodology and getting the full team involved are important for a decentralized model.

> *From project teams to product teams, a stakeholder from all groups is necessary.*

- When all parties are involved from the beginning to the end of the testing process, it helps people build ownership and excitement.
- From project teams to product teams, a stakeholder from all groups is necessary.
- The customer service team and call center should also be involved, so that everyone knows what is being tested.
- Focus on a shared pain point of your customer or company, and track the impact of each test from start to finish.
- Use win rate and test velocity as justification for a dedicated optimization team.
- Identify a key champion for each segment of the business. This enables the enforcement of accountability.
- As you get started with your program, don't decentralize too quickly. Focus on building a program foundation and a center of excellence (COE) to guide and teach team members.

Conversation 6

Keeping Testing a Constant During Organizational Change

Led by Tim Blacquier, Director, Online Product Management, Imagitas

People change teams, they leave companies. Companies shrink, they grow; they acquire new companies or get acquired. How do you keep the momentum going during times of change? And how can you use times of change to accelerate testing? In this session, we discussed strategies for sustaining testing programs during times of uncertainty, including efficiently onboarding new team members and developing a global culture of testing that's consistent across the organization.

Top takeaways from this session:

- You need one big success story to evangelize your testing program.
- Have a process in place for off-boarding old employees—you need to make sure they don't have access to the tools after they leave.

> *To build excitement and support for testing, let the C-suite participate in or launch their own tests.*

- To build excitement and support for testing, let the C-suite participate in or launch their own tests.
- Set up an internal training program for testing software.
- Keep an archive of old tests and their results.
- Use dashboards and gamification to get people involved in and excited about your testing program.
- Try to keep the summary of your test results to the size of a tweet.
- If people are worried that a test may fail, use "it's only a test" or "it's only a POC" to set them at ease.

Conversation 7

From Campaigns to Conversations: Empowering Marketers to Make the Shift

Led by Adam Corey, VP Marketing & Business Development, Tealium

Customers have more control than ever over how they buy, when they engage, and what they share. To make an impact, marketers need to do more than build a marketing campaign around a catchy tagline—they must focus on the entire customer experience. This is a fundamental shift in the way most of us do business, and the transition isn't always a smooth one. In this session, we talked about strategies to encourage your marketing team to move from discrete campaigns to meaningful, data-driven experiences.

Top takeaways from this session:

- Testing is a big undertaking, and it needs vendors and resources.
- Focus on company culture in order to prime demand for optimization and testing.
- If a testing culture isn't coming from the top-down, build it up.
- Sometimes a good test is to ask customers what they want.
- Create a central repository for testing and offer a visual way for them to engage with the data by using a tool like Tableau.
- Match personas with segmentation to make customers come to life.
- Use myriad tactics—meetings, posters, showcasing wins on TV monitors, voting on winners—to engage groups to both share and educate about testing.
- Bringing data to life with the use of session replays can help garner support for testing.

> *If a testing culture isn't coming from the top-down, build it up.*

- Identify the high-value actions you want your users to take.
- Introduce softer metrics into testing, such as the Net Promoter Score, which measures the willingness of customers to recommend your company to others.
- The gamification of tests is a fun way to garner interest in testing.

Conversation 8

Eat Your Spinach: How Testing Page Performance, Algorithms and Other Application Technology Can Drive Results

Led by Lee Carson, Director, Digital Experiments, Marriott International

Most companies try to bring home the bacon by focusing their tests on the design of their digital marketing and products. Hidden behind the sizzle is a field of green: Amazon, Microsoft, and others have found that every 100ms speed change can affect revenues by as much as 1 percent. How have you been able to improve the parts hidden from your consumers? Do you use your existing testing tool, or do you leverage other platforms to accomplish these tests? In this session, we shared our experiences and discuss strategies for conducting successful behind-the-scenes tests.

Top takeaways from this session:

- Make connections between site performance and site conversion—they may be more related than you think.
- Testing tool companies might have a less-advertised capability that can help out with testing site performance.

"Whenever possible, benchmark your site performance against competitors in addition to your own improvement."

- Performance and stability are most important in native mobile apps, where customers can hurt you with one-star reviews.
- Set up a performance budget to allocate resources to performance testing.
- A one-size-fits-all benchmark for performance testing may not exist.
- Performance testing is almost impossible to do without using backend server tools.
- Whenever possible, benchmark your site performance against competitors in addition to your own improvement.
- Increasing your site performance can make teams more comfortable with front-end testing for conversion, because it lessens their fears of increased load time.

Conversation 9

Using Data to Make Decisions

Led by David Bacon, VP, Web Optimization and Testing, SunTrust

Mature testing programs share many qualities, but perhaps the most important one is a steadfast commitment to data. Team members in these programs have a "data first" mindset, using the numbers to guide test strategy and prioritization. But what does it mean to be truly data driven, and how can you make that shift? In this session we talked about making data the foundation of your testing program—developing a culture that is rooted in data, using it to build confidence around your ideas and decisions, and moving beyond testing button colors to get real results.

Top takeaways from this session:

- People are protective of their authority and are likely to ignore data that doesn't support it.
- A data-driven culture requires a lot of analysts.
- Getting past aggregate data and into visitor-level data is a requirement for modeling user experience optimizations.
- A data-driven culture requires an executive champion.
- To make your team more data-driven, set quarterly benchmarks.
- It's not a passive process—you have to evangelize and push your stories through the organization.
- Show test wins on landing pages first to prove out data, then get executive buy-in.
- It's critical to know the difference between discovery analysis, which is completed before a test to uncover areas of opportunity, and test analysis, which examines the results of a completed test.

> *"A data-driven culture requires an executive champion."*

- Your team should be robust, so look past their roles to their backgrounds.
- Remove "I think" from your vocabulary and replace it with "the data shows...."
- Back up your data with as much supporting evidence as you can, such as customer feedback.

Conversation 10

Personalization Strategy: Finding What Works

Led by Tiffany Raymond, Senior Manager of Global Experimentation and Optimization, PayPal

As personalization builds momentum, many companies grapple with the unique challenges involved, such as making sense of user behavior, identifying customers across channels, and finding (and paying for) the right technology. In this session, we explored scalable and sustainable methods for creating tailored customer experiences—those that go beyond engagement to influence conversions. We talked about opportunities for personalization, manual versus automated approaches, and other relevant topics.

Top takeaways from this session:

- Personalization now is what testing was five years ago.
- There are infinite ideas for personalization, but marketers struggle with how to do it.
- It's often important for optimization team leads to provide the ROI of their program—and personalization complicates this even further.
- Personalization requires more time than an A/B test, and the industry is still adapting to this.
- There are a wide variety of personalization tools to use, and it's very important to learn about each of them and decide what you want.
- People are OK with a black box algorithm for personalization, but there is a big opportunity to see those algorithms and tweak them to help drive further testing.
- Having sites designed as a bunch of swappable modules helps reduce the level of effort needed to serve personalized content.

"People are OK with a black box algorithm for personalization, but there is a big opportunity to see those algorithms and tweak them to help drive further testing."

- Linking online and offline data is a huge untapped opportunity.
- Share findings with marketing so they can build it into their campaigns.
- Testing can help determine the right audience segments for personalization.

Conversation 11

Testing Beyond the Margin

Led by Eric Almquist, Partner, Bain & Company

Testing small elements on your site—button color, image size—may produce reasonable lifts, but the greater impact usually comes from testing components that are fundamental to your business, such as pricing and promotions. Doing this requires buy-in from senior executives—those who make high-level decisions about marketing and strategy. In this session, we talked about the kinds of tests that get big results and how to package these results so that decision makers will listen.

Top takeaways from this session:

- Test results are often surprising or counterintuitive.
- Use a mixed-methods approach in which qualitative, attitudinal, and experimental data are informed and inform one another.
- We often see teams testing what's under their control, but they need to reach out more aggressively to other parts of the business.
- App testing is slowed by functionality needs, tool availability, mobile traffic, data stitching, and organizational silos.

"We often see teams testing what's under their control, but they need to reach out more aggressively to other parts of the business."

- The challenge is often convincing people to give up control of their business unit.
- Understand that giving up control is often perceived as giving up authority.

Conversation 12

Communicating the Value of Your Testing Program to Executives

Led by Steve Harris, Senior Business Director — Digital Analytics, Capital One

Testing programs face unique hurdles as they grow. Teams must secure funding, demonstrate clear wins, and manage expectations—all with the ultimate goal of getting buy-in from executives. So how can you communicate your program's value so that executives are not only supportive but excited? The answer is different for each company, but it starts with an understanding of how your company is structured and how to best engage with stakeholders. In this session, we shared our success and challenges in influencing others to build a testing program that thrives.

Top takeaways from this session:

- It's very difficult to determine the ultimate revenue of your testing program; few are able to get it right.
- Third parties like a testing partner can help communicate the value of testing to executives.
- Starting with a testing partner can help you get testing right.
- Holding a third party to a goal is a great way to communicate that you're trying to provide a meaningful return.
- Quick wins help build a base of support, allowing you to then sell executives on additional value.
- Giving executives one to three metrics to focus on as well as volume of tests helps to quantify the program.
- Hosting a regular "expo" to simplify results into themes can educate your organization and materialize learnings.

"Giving executives one to three metrics to focus on as well as volume of tests helps to quantify the program."

Conversation 13

Getting Value from Your Personalization Program

Led by Pete Koomen, Co-Founder and CTO, Optimizely

Personalization offers a wealth of opportunity for improving conversions, driving revenue, and learning more about your customer segments. But where do you focus your efforts? And more importantly, how do know if the impact is worth the effort? In this session, we talked about how to get value from your personalization program, including identifying opportunities for personalization, measuring ROI, and structuring a team for the greatest chances of success.

Top takeaways from this session:

- Personalization holds a great deal of perceived value in relation to revenue.
- Everyone is young in their personalization journey, if they're doing it at all.
- Excitement about personalization can be garnered by looking at segments within a test that respond differently to different experiences.
- We must ask ourselves if it's desirable to show a unique experience to each visitor (probably not).
- Use ADAMS to determine what to segment: Accessible, Differentiable, Actionable, Measurable, Substantial.
- It may be valuable to test different personalization tools against each other, essentially testing algorithms.
- The very conversation about personalization demonstrates a rapid and drastic evolution in the maturity of conversations around testing.

"Even a small amount of personalization requires a huge amount of creative and development effort."

- Even a small amount of personalization requires a huge amount of creative and development effort.
- Eventually, personalization should live in nearly every department of an organization, almost as a consultative entity.

Conversation 14

Best Practices in Cross-Channel Personalization

Led by Drew Burns, Principal Product Marketing Manager, Adobe Systems

Far too often, testing programs and practitioners limit themselves to siloed data and content between channels, whether from web, mobile, in-store visits, or other platforms. Instead, they could be digging into the data to gain a deep, holistic understanding of how to effectively personalize content at each touchpoint in the customer journey. In this session, we discussed tips and tricks on how to harness your full data set, with a particular focus on maximizing customer relevance and lifetime value along with the metrics that matter most to your company.

Top takeaways from this session:

- Personalizing content at each touchpoint in the customer journey is a big challenge for marketers.
- Definitions of personalization widely vary—some marketers consider it serving previously viewed content to returning visitors.

"Mapping out the customer journey is crucial to determining the right personalization approach."

- A solutions architect can help bridge the gaps in data across channels.
- Nielson lifestyle segments can help you better understand your customers.
- Consider creating a "personalization task force" to help overcome the organization's misalignment issues, which can stall progress.
- Mapping out the customer journey is crucial to determining the right personalization approach.
- Personalization can trigger visitors' privacy concerns, so there's a need for counterbalance.
- Teams that are practicing personalization say that commitment, accountability, patience, and persistence are all necessary.
- Testing and personalization shouldn't conflict with one another—they work together in tandem.

Conversation 15

From Conversion Optimization to Customer Experience: How to Navigate the New Personalization Landscape

Led by Simon Dean, SVP Customer Experience, Qubit

Digital customer experience is the new battleground for Big Ideas, where smart changes to the user journey can generate millions in revenue. This isn't about only testing graphic elements on a page—it's about tying together multiple parts of a business around the needs of a consumer. In this session, we talked about the data foundations you need for targeted segmentation and broader personalization. We also discussed how to test initiatives that drive conversions and those that cut costs.

Top takeaways from this session:

- Segmentation is serving up a specific experience to a group of users, while personalization is serving up a unique experience to a specific user.
- Connecting the personalized experience between in-store and online purchasing presents the next big opportunity.
- It all comes down to relevance—a relevant experience can feel personalized.
- Segments to personalize for include new visitors, frequent visitors, and VIPs.
- First-party data (site behavioral data) is far more valuable than third-party data (data you purchase that describes the demographics of your visitors). First-party data shows what people are doing while they're on your site, while third-party data describes the key attributes of those people or people similar to them.

First-party data (site behavioral data) is far more valuable than third-party data (data you purchase that describes the demographics of your visitors).

- Is personalization more valuable than a good user flow? The jury is still out.
- There's a fine line between personalization and a perceived invasion of privacy. The general public is not aware of how much information we capture, so we have to tread lightly when serving it back up to them.

Conversation 16

Should Your Organization Embrace a "Culture of Testing"?

Led by Phil Haslehurst, Head of Marketing, Decibel Insight

A culture of testing can be seen as a democratizing, empowering process—or a drain on resources and a pipeline for bad ideas. The devil is in the details of the execution. Whether you decide to fully embrace or reject a culture of testing, your position should be consistent and well-considered. In this conversation, we talked about what a testing culture looks like, the potential consequences of both approaches, and stories of success and failure.

Top takeaways from this session:

- A culture of testing enables customer-centricity because it brings the customer in to the picture.
- "Best practices" can kill a testing culture by leading everyone to think they always work.

> *"Best practices" can kill a testing culture by leading everyone to think they always work.*

- Instead of relying on best practices, use language like, "On this page, for this set of users, this worked."
- A healthy testing culture is one where employees get really good at asking the right questions and freely admitting they don't know something.
- Admitting a gap in knowledge is the only way to get the right answers.
- Internal testing teams should have the right goals. Instead of aiming to hit a certain number of tests per year, they should be accountable to hit a certain percentage lift in key metrics and gain a certain number of learnings.

Conversation 17

Raising the Personalization Bar: Building a Foundation for Success and Growth

Led by Michael Blumenfeld, Managing Consultant, Financial Services, Oracle 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 tackled 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:

- Few companies are doing personalization. Many think that everyone is doing it, but most haven't has even started.
- Using personalization to test for retention is very valuable.
- Marketers have different definitions of personalization, with some putting recommendations engines in that category.
- Many know that segments perform differently but have no way of targeting them.
- Logins are key to personalization and loyalty, as they are a reliable way to identify the user.
- Legal, marketing, engineering, analytics, and merchandising are all needed to create a personalization group.
- VoC research and cross-device testing both offer valuable insights, but few programs are doing them.

"Logins are key to personalization and loyalty, as they are a reliable way to identify the user."

- Before you spend resources on developing a personalization program, conduct user research to find out if the consumer actually wants personalization.
- Marketers are seeking more detail on the technical aspects of personalization, including how to measure it.

Conversation 18

Will Your Next Site Release Help or Hurt Conversions?

Led by Justin Bougher, VP of Product, SiteSpect

Every time you push a new release to your site, it affects the customer experience and your bottom line. Optimizing for conversion means understanding the business impact—immediately. In this session, we explored how testing can quickly measure and isolate the impact of a site release. As a result, you can mitigate risks and iterate on positive impacts to the customer experience. Use cases are not limited to visual changes to the experience but can apply to any change that is a part of a site release.

Top takeaways from this session:

- Being agile will mitigate the risks that come with new site releases.
- Time your tests so they coincide with your site releases, and make sure your site releases don't interfere with your testing roadmap.

> *Test component parts first to have more confidence in your updates.*

- Open communication with development teams is important; the site code and test code need to play nicely together.
- Use past data to help predict the risk for future releases.
- Responsive sites are difficult to mange testing on because test variations must be built to accommodate multiple breakpoints.
- Test component parts first to have more confidence in your updates.
- Test only in browsers used by the top 90 percent of your user base.
- Consider bottom-line and not just top-line sales data, as testing may affect factors invisible to top-line sales (e.g., returns, differing product margins).
- Be wary of unknown third-party releases, or "shadow IT," that could potentially cause your site and tests to break.
- The number one reason for a site redesign is simply, "It has been too long." Instead, redesigns should be driven by data.

Conversation 19

Testing Into a Redesign

Led by Caitlin Anderson, Web Optimization Analyst, American Eagle Outfitters

A redesign is a huge undertaking. Even a small misstep can significantly affect revenue. Testing can mitigate the risks involved, but what's the most effective method? Do you build and test an entire site, or do you take a piecemeal approach? This session covered a range of redesign situations, from product pages to mobile apps to entire websites. We discussed both the challenges and successes of testing into a redesign, exchanging advice on testing hypotheses, dedicating resources to the right wins, and getting ahead of the redesign process through testing.

Top takeaways from this session:

- Maintain three actionable buckets when planning for a site redesign:
  1. Just implement (don't test)
  2. A/B test
  3. User test

  Everything you want to do to the site—big or small—will fit in one of these.

- The ideal scenario is for the testing team to be integrated closely with the creative/UX team when planning for a redesign. This allows both teams to start off with a common goal and work off each other along the way.

- When redesigning for a responsive site, test different experiences for different devices (desktop/tablet/mobile). They'll have unique hurdles despite being a part of the same code base.

- Test as much as you can as often as you can. Once testing becomes a core part of a company's culture, team members want to know how the experience will perform—and this makes the decision to test during a major redesign easy.

> *The ideal scenario is for the testing team to be integrated closely with the creative/UX team when planning for a redesign.*

- One way to validate glaring issues and clarify customers' needs is to user test your A/B test variations before launching a redesign test.

- If you aren't able to test into elements of a redesign before it launches, have a large queue of tests to test after the redesign, in order to isolate major things that could have moved the needle.

Conversation 20

Are You Testing Your Testing Program?

Led by Suzi Tripp, Senior Director, Experimentation Strategy, Brooks Bell

A/B testing is one of our most valuable tools for making informed business decisions. But how often do we apply what we know about testing to the very programs we use to execute tests? The truth is, your testing program is just like a sign-up form, checkout flow, or mobile app—it needs to be evaluated and optimized on an ongoing basis. Applying testing principles internally can help your team maintain momentum, improve focus, and increase wins. In this session, we talked about ways to do that, including evaluating processes and setting goals for your program.

Top takeaways from this session:

- Though people aren't necessarily tied to KPIs, they often have them as personal goals.
- Common program KPIs include:
  - Volume
  - New areas tested
  - Revenue/transaction goals
  - Win rate
  - Cascading of learning
  - Estimated test build time versus actual test build time
  - Stakeholders involved
  - Winners implemented
  - Tests produced by internal design team vs vendors
  - Time pushed to 100 percent by tool
  - Testable percentage
  - Team morale and happiness
- People are interested in building in a customer-centric KPI, though few are doing it now. Testing is typically focused on an immediate revenue lift, and customer-centric KPIs may not lead to that.
- Most companies have a huge need for a test repository. However, some companies that have one struggle to make it useful, as getting data into it is not priority and people rarely consult it.

> *A holdout group can help determine your degradation/test fatigue rate.*

- Statistical rigor and measuring lift are topics of interest. People are considering bringing the finance department into the conversation to craft the methods for projection.
- A holdout group can help determine your degradation/test fatigue rate.
- Avoid reinventing the wheel with each pre-strategy data request. Instead, create pre-test page analyses, a list of desired metrics per page type that they can refresh and build upon each time.

Conversation 21

Testing as a Way to Drive Innovation

Led by Dena Becker, Sr. Product Marketing Manager, Microsoft

Are your test ideas strategic, sensible—and completely boring? What's often missing from our well-informed experiments is the willingness to take risks and run tests that are original, innovative, and more than a bit uncertain. It's these kinds of tests that may actually move the needle, giving us unexpected learnings and even helping us develop the latest trends. In this conversation, we discussed the innovative testing mindset and how it can help you trounce flat tests.

Top takeaways from this session:

- A center of excellence (COE) "expo" is an opportunity to showcase some of your great wins. It's a way to show the learnings you've had from the year, and it helps encourage C-level and executive buy-in.
- It's really important to think about how you want to communicate the impact of a test.
- Tests you've done in the past are drivers for innovation and help you determine where you need to go.
- Establishing a culture of testing takes communication and education. People often don't understand what you can do with testing.
- We often assume that everyone understands the testing world, but they don't. Look internally for opportunities to educate others.
- Introduce people to experimentation from the first day. Intercept and begin building a testing alliance.

"Tests you've done in the past are drivers for innovation and help you determine where you need to go."

- To be more targeted about where you use resources, start small. Consider consolidating resources.
- To drive testing culture within your company, find a testing champion or "bright star" to help spread excitement and successes of testing.
- To achieve innovation, go rogue to strive for success.

Conversation 22

The Significance of Significance

Led by Mark Jodlowski, Director of eCommerce, American Girl

You've calculated the duration for the specific design, executed the test flawlessly, and scrubbed and analyzed your data...but your results are not statistically significant. However, the data indicate the test is approaching significance. Now what? Does it matter? Is there something there? In this session, we discussed the art and science of a successful test as well as alternative ways to evaluate success in experimental data.

Top takeaways from this session:

- Look at daily lift in addition to significance level to determine the winner.
- Don't trust a green "Win!" button in the tool. There are many factors that may complicate outcomes, such as outlier order, and tools may not take them into account.

> *Removing outliers is critical for the repeatability of your results.*

- Confidence intervals help us understand reliability of results by giving us a measure of the variability we can expect to see.
- Only test full weeks—7, 14, or 21 days—and throttle to hit that range. This will ensure all weekdays are equally represented and eliminate any weekly seasonal effects.
- Holiday traffic may not show significant lifts from changes that would have shown significant lifts in off-season testing, because holiday users are more dedicated and less affected by site changes.
- Push back on metrics to make sure they're aligned with your hypothesis.
- Removing outliers is critical for the repeatability of your results.
- Qualitative data may not be statistically significant, but it's still very useful. Many good test ideas come from qualitative data like heatmaps.

Conversation 23

Building a World-class Testing Program and Achieving Alignment Across the Organization

Led by Erin Seraydian, Director, Business Planning and Analysis, Time Warner Cable

How do you get disparate teams—marketers, engineers, analysts, product managers—to become engaged in testing? How can you get people to care about metrics and goals that aren't their own? In this session, we'll talk about the challenges and solutions around building a best-in-class testing program across the organization. We discussed how to implement an effective governance process, how to ensure that stakeholders are part of the process, and what the future holds for the organizational structure of testing. We also talked about sites, products, and even outside groups that play a complementary (or conflicting) role with testing.

Top takeaways from this session:

- Building relationships is critical to achieving alignment and buy-in across the organization.
- Work with stakeholders to align testing goals.
- Your product should not be fully driving your test ideas.
- Implement winners right away to recognize the revenue.
- QA is critical for program success. Without it, you risk pushing out errors live, whether it's content mistakes or broken functionality.
- Understanding the entire customer journey is an important piece of a successful testing program.
- Three years from now, centers of excellence (COEs) may not exist. Governance is still needed.
- Testing volume is an issue in newer technologies like native apps, where traffic can be limited.

"Three years from now, centers of excellence (COEs) may not exist. Governance is still needed."

- Organizational charts can help people understand the testing process and identify points of contact.
- Taking risks, like going rogue within your organization, can sometimes have a big pay out.

Conversation 24

How to Find the Right KPIs and Leverage Them for Learnings

Led by Swapna Joshi, Director, Product Management—Shopping Experience, Levi's

In order to measure the success of your tests, you have to focus on the right metrics. KPIs aren't just a way to be accountable to business goals—they can help you gain key learnings, whether you win or lose. But with seemingly endless metrics to measure, how do you know which ones to target? In this conversation, we discussed setting goals, identifying the right KPIs, and using data to gain insights about your customers and inform future tests.

Top takeaways from this session:

- Revenue is still the king of KPIs.
- Whole page engagement is still dominant, despite the desire for more informative descriptors of impact.
- Email is a valuable stitching point for connecting a user across platforms.
- Connecting offline data and conversions to tests remains a challenge for businesses.
- Conversion rate is a flawed KPI because it depends on how qualified the traffic is that's coming to the site from external marketing campaigns.
- Testing for learnings still requires the measurement of guardrail KPIs.

While far from perfect, tools to measure customer satisfaction (CSat) can be useful longtail indicators of a testing program's success.

- Conflict can exist between merchandise groups and optimization teams.
- While far from perfect, tools to measure customer satisfaction (CSat) can be useful longtail indicators of a testing program's success.

Conversation 25

Evaluating and Communicating Program ROI

Led by Anthony Rindone, Manager, Product Management — User Trust & Conversion, Wayfair

Evaluating the success of your testing program is a critical part of communicating value, getting buy-in, and making future business decisions. But how can you best evaluate the ROI of your resource investments, including tools and people? And how do you communicate this to stakeholders to demonstrate program success? In this session, we talked about the considerations of program evaluation, including managing your resources, prioritizing tests, and communicating ROI to management.

Top takeaways from this session:

- Set the expectation up front that testing is not just about revenue. Some companies set aside a certain percentage of tests that are focused on learnings, not revenue.
- Communicate all of the results and learnings from the testing program, not just ROI.

> *Explain the importance of testing, including your most significant learnings, during your employee onboarding process.*

- Actionable information is needed to show the value of testing to other teams.
- Find a champion of testing among your company's leadership team.
- Explain the importance of testing, including your most significant learnings, during your employee onboarding process.
- Industry and past year benchmarking is a great way to grade your testing program.
- Experimentation should be viewed in the company as an essential resource, like design.
- It's difficult — but very important — to quantify the potential impact of a test.

Conversation 26

Are UXperienced?

Led by Jonathan Hildebrand, Director of UX, Brooks Bell

What the heck is UX, UI, and this "personalization" stuff everyone keeps talking about? These are more than just buzzwords—they're the bedrock of any world-class testing program. Through engaging activities and open conversation, we talked about the difference between UX and UI, how to identify the tasks your users want to complete, and how that knowledge can better inform your testing strategy—and ultimately your bottom line.

Top takeaways from this session:

- UI refers to the "design elements" that users interact with, while UX is how they feel when they have to use that UI to complete a task.
- People who are given the exact same task often complete it very differently.
- There are many different ways to try and segment people, but segmenting by task helps limit the number of groups while getting the most impact.

> *It's important to reconcile customer intent with business intent to understand how to craft the user experience.*

- The industry needs to shift its thinking into a more "customer journey" mindset.
- Often, we try to translate desktop to mobile, but it may make sense to start with mobile instead.
- As an industry, we haven't done a good job connecting user research with testing. We also haven't done a good job of connecting analytics with creative. We need to do better.
- Most everyone's teams (analytics, creative, developers) are siloed, which limits knowledge-sharing and enables one-sided agendas to be pushed.
- It's important to reconcile customer intent with business intent to understand how to craft the user experience.
- Use one challenger each test to determine customer intent (or to build trust, build your brand, or other user-centric goals).
- Become good storytellers of analytics: The story is how we're advocates for customers, and why we share what we do.
- Always have one powerful story that explains why we test and what we get out of it.

Conversation 27

Culture Shift: Experimentation Strategy from Web to Mobile Apps

Led by Aaron Shaffer, Director, Digital Optimization, Starbucks

While most marketers and testing experts want to think cross-channel, there is often a shift of experimentation strategy when it comes to testing mobile apps. This session focused on adapting your strategy to the small screen. We discussed the differences between web and mobile experiences and even device platforms, how to use web learnings to inform hypotheses for mobile testing, and how to best ensure consistent messaging across digital platforms.

Top takeaways from this session:

- Most companies are using server-side/ CMS testing tools.
- Testing teams and developers are still learning to be become comfortable with third-party testing tools in mobile apps.

"The cost of testing and implementing results in native mobile apps has not been justified by many programs."

- Webview has been successful as a platform for mobile testing.
- The cost of testing and implementing results in native mobile apps has not been justified by many programs.
- For many companies, the cost of native app testing currently outweighs the desire.
- Many teams find that implementing a software development kit (SDK) is not as simple as implementing a tag management system (TMS).
- Deciding on test strategy for mobile is proving difficult: Do we strip down features and make it work, or do we put them in with the risk of failure? Marketers haven't found easy answers.

Conversation 28

Using Data to Discover Test Opportunities

Led by Tony Monterosso, Manager, Digital Testing and Optimization, Comcast

One of the ongoing challenges of testing is figuring out what to test next. It may be easy to go with gut feelings or executive opinions, but the starting point for new test ideas should be the data. However, sitting down and analyzing it can be cumbersome and time consuming. Where do you start, and what do you look for? In this conversation, we discussed the role that data can and should play in discovering your next test opportunity, including important metrics, advanced analytics, and real-world examples.

Top takeaways from this session:

- Heatmaps can help you generate incredible testing ideas.
- Testing the impact of site speeds has also yielded good business directions for many companies.
- Splicing seemingly unique metrics can result in interesting ideas.
- There are a lot of opportunities to engage different subject matter experts (SMEs), such as call center representatives, for test ideas.
- Analyst support is needed to bring these new ideas to fruition.
- Use session replays to illustrate test ideas to non-data folks.
- Predictive modeling and customer nurturing campaigns yield a slew of ideas.
- Intake forms with qualifying data requirements are key; otherwise, the ideas won't be well thought out or vetted.

> *Predictive modeling and customer nurturing campaigns yield a slew of ideas.*

- User forums and customer panels are great places to learn about specific pain points.

Conversation 29

Taking Testing Offline: Applying A/B Methodology in the Non-Digital World

Led by Geoff Lewis, Senior Manager, Analytics, Citrix

We often think of A/B testing as a digital activity, but the practice has all sorts of real-world applications. From retail to insurance, nearly all verticals can benefit from non-digital testing. In this discussion, we brainstormed about ways to run experiments outside a website, whether by testing in-store displays, customer service protocols, or even sales scripts. It was an energetic and creative conversation about the challenges, opportunities, and benefits of taking testing offline.

Top takeaways from this session:

- With offline testing, getting more people involved in the process can lead to more success.
- The relationship between online and offline is progressing and the level of discussion is getting better. Data stitching is now becoming more relevant.
- It's all about the experience. The customer journey is becoming more about the relationship between online and offline.
- As more digital touchscreen interaction is available in stores, people may be driven back to the store.

"The relationship between online and offline is progressing and the level of discussion is getting better. Data stitching is now becoming more relevant."

- Online and offline data will become more closely tied with personalization.
- We may be swinging back toward offline—we're coming to an equilibrium.

Conversation 30

Discovering Customer Intent Through True Journey Mapping

Led by Scott Calise, Senior Director Strategic Insights, Product Analytics and Digital Research, Viacom

Quantitative data can provide valuable information about how customers interact with digital experiences, but it can't tell us the "why" behind their behavior. To understand that, we need to go beyond the numbers and listen to their stories. Qualitative data can help us create a better journey map—and thus, a better digital experience—by uncovering pain points that web analytics alone cannot. In this session, we talked about qualitative tactics to inform optimization, such as administering surveys, running user sessions, and organizing customer panels.

Top takeaways from this session:

- Consider using three sources of data for updates: testing, quantitative, and qualitative.
- Aim for a common language across teams. It should include: personas/audiences, their decision stage, and the areas of focus based on their feedback.
- The industry has been shifting to micro-audiences and micro-moments.
- Instead of thinking about the user journey as a funnel, think of it as a continuous cycle.

"Instead of thinking about the user journey as a funnel, think of it as a continuous cycle."

- The end goal is to have intent-based audiences, but you have to start with a high-level view.
- Many marketers find it difficult to go from segments to personas and vice-versa.

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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.

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