THE EXPERIENCE OPTIMIZATION PLAYBOOK
FOR DIGITAL MARKETERS

Let Your Customers Uncover Your Next Big Win
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INTRO
EVOLUTION OF TODAY’S INTERNET USER
Today, internet users expect more than ever before.
They’re on the go and they’re tech-savvy. They know they have other options out there and can find what they’re looking for in a matter of seconds.

Whether they’re coming to your site to make a purchase, sign-up for your service, test out your software, or read an article, you have a very short window in which to deliver the experience they want.

Figuring out the right experiences to deliver customers is one of the most valuable questions online businesses need to answer and this guide will help you do just that. We’ll explore real challenges you are facing and arm you with the single most powerful strategy to overcome them: Experience Optimization.

You’ll benefit from this guide if:

• You’re looking for cost-effective ways to improve your digital marketing strategy and get more out of your marketing budget
• You’re wondering if optimization and testing is a good option for your business
• You’re looking for new, proven methods to turn more visitors into customers
• You want to learn more about ways to grow your business through optimization and testing

Here’s what you’ll learn:

• What is experience optimization and why it’s essential for any online business
• How to gain a better understanding of your online audience’s unique needs and preferences
• How businesses like yours are using optimization to their benefit
• How you can get started
EVOLUTION OF TODAY’S INTERNET USER

A lot has changed since the days of dial-up internet and Netscape Navigator. Today, visitors expect more than ever before across a growing number of digital touchpoints.

1993
Meet, the 1st public web browser: Mosaic (later Netscape)
Users around the world can easily access and navigate the internet.

1994
eBay & Amazon launch
Online shopping is born. Internet users can log in and purchase goods and services with just a few clicks.

2004
Gmail launches in beta
More internet users gravitate to this user-friendly email platform with better privacy and security settings.
Students at Harvard log in to a new social media site: TheFacebook.com

2010
Apple launches the iPad
Mobile browsing gets a new, larger interface that rivals the desktop experience for shopping, gaming, reading, and more.

2007
Apple introduces the iPhone
Users browse the internet on the go from their mobile devices.

2005
YouTube reaches 1 million video views
Internet video and virality gain a new platform.

Ad retargeting takes off
Users are reminded of what they saw on a website even after they’ve left it. Ads are more relevant and personalized.

The internet goes social, as users connect and share on a more personal level.
2014
Mobile usage makes up 25% of total web usage globally

We’re always connected. 29% of Americans say their phone is the first and last thing they look at every day.

2013
Apple rolls out iBeacon technology

Businesses can provide smartphone users in their brick-and-mortar stores with location-tailored notifications, flash sales, and more.

The average American spends 3+ hours/day on social media

85% of shoppers say social networks help them decide what to purchase.

Apple announces 1 million apps in the App Store

From work to socializing to shopping, Smartphones play a major role in making people’s lives easier that goes well-beyond communication.

2012
Google announces “Project Glass”

As more consumers adopt wearable technology (a projected 64 million by 2017), users will expect increasingly wearable-friendly experiences.

Second Screen experiences take off

80% of smartphone and tablet owners use these devices while watching TV.

TODAY
Your digital audience expects more than ever before.

Businesses that serve up the best digital experiences have the opportunity to be wildly successful.

Sources: IMB, Generation C Study, Qualcomm, Google Mobile in-Store, Business Insider
SECTION 1

EVALUATE YOUR DIGITAL EXPERIENCES
There is higher standard for what today’s visitors expect from experiences with your business.

But understanding exactly what that is can be a challenge. They’re motivated by different goals. They’re coming from different locations and using different devices. They’re interacting with your business at many different touchpoints and are at different stages along the customer journey.

“We’re maybe as good as a coin-flip at guessing what’s going to work best for our users. People are really fascinating and interesting... and weird! It’s really hard to guess their behaviors accurately.”

–Peter Koechley, Co-founder, Upworthy

Best-in-class companies like Google, Amazon, and Netflix have set the bar high, providing personalized experiences for shoppers, readers, and other visitors tailored to their unique preferences.

“We see our customers as invited guests to a party and we are the hosts. It’s our job every day to make every important aspect of the customer experience a little bit better.”

–Jeff Bezos, CEO, Amazon

Let’s face it, your visitors know they have options. To stand out against the ever-growing online competition, you’ll need to provide the best possible digital experiences.
Defining an “experience”

An experience is any interaction a visitor has with your business.

Some examples include:

• Customers visiting product information pages on your site, adding items to their cart, and moving through the checkout funnel
• Users checking out a recent post on your blog
• Prospects visiting a landing page after clicking through a display ad in search
• Customers opening your monthly newsletter
• Customers visiting your brick-and-mortar store
• Prospects attending an event hosted by your company
• Customer service phone interactions

*Source: Kissmetrics*
How’d you stack up? Taking stock of what is and isn’t working at each digital touchpoint is the first step towards optimizing those experiences.

<table>
<thead>
<tr>
<th>EXPERIENCE</th>
<th>GOAL</th>
<th>WHAT’S WORKING</th>
<th>AREAS FOR GROWTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly email</td>
<td>Increase purchases on your website</td>
<td>High click-through rate</td>
<td>Higher click-throughs have not driven more purchases. Customer reach website and bounce.</td>
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<td>newsletter</td>
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<tr>
<td>Twitter account</td>
<td>Build brand awareness and engagement</td>
<td>Many followers</td>
<td>Low engagement</td>
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SECTION 2
ENTER, EXPERIENCE OPTIMIZATION
Experience optimization is a highly effective way to take prospects and turn them into revenue. With experience optimization, you’ll:

- Gather real-time information about your audience
- Build experiences tailored to their unique needs and preferences
- Enhance your current marketing strategy
- Understand what does and doesn’t work for your customers at each touchpoint
- Grow your business, with lasting customer relationships, and improved ROI

The Power of Iteration:
Experience optimization is an iterative process. Your audience is constantly growing, changing, and evolving. Optimization allows you to keep tabs on many changing variables and alter course smoothly, so you’re always on top of your game.

*sources: IBM TeaLeaf 2012
To get a better feel for experience optimization, let’s take a look at one company who does it right—HubSpot. **HubSpot’s Amanda Sibley** explains how they test various forms of personalization throughout their entire website, and almost all content they post across all marketing channels. According to Amanda, her team puts significant effort behind optimization because they know they’ll see better results in the long run.

### Smarter content

Tailoring the content and materials on your website to the audience browsing them can have a huge impact. At HubSpot, if we know a visitor is from an enterprise size company, we’ll serve up specific case studies and value props geared towards enterprise-level customers. This personalization shows the visitor that our software is a good fit.

### More effective emails

Email marketing is one of the most direct ways to reach your audience, but can also be the biggest turn-off for customers (SPAM ALERT!). That’s why we test all the emails we send.

In a recent series of tests, we experimented with images. (To include images, or not to include images? ...that is the question.) Contrary to what you might think, we found that removing images from our marketing emails actually increased click-throughs by 60%. We’ve since optimized our customer emails accordingly—removing images and focusing on the text our audience prefers.

Other email tests we’ve run have focused on subject line, length, copy positioning, signature/from address, and calls-to-action.

This tactic has helped us achieve a 42% improvement on our calls-to-action.
Expanded Social Reach

Based on our findings from the email-image tests, we decided to test the use of images in our tweets as well. This time around, we all believed the image would perform better—it looks more appealing and owns more real estate. Did our Twitter followers agree? Yes!

The tweet with the image saw 36% more clicks, 41% more retweets, 48% more favorites, and 55% more leads generated.

More Customers

Our blog has millions of viewers each month and is one of the better lead generation channels for our marketing team.

We recently tested two different types of CTAs to see what resonated best with our audience—our original CTA, located at the bottom of each blog post, versus a slide-in CTA located closer to the top of the page. We wanted to understand if a CTA that was “more disruptive” would attract more clicks and convert more leads than the typical bottom-of-the-page button.

Site visitors responded significantly better to the “more disruptive” variation—with a 106% increase in click-throughs and a 38% increase in leads generated. To better serve our visitors (and increase conversions) going forward, we implemented slide-in CTAs on most of our top-performing blog posts.
SECTION 3

THE STRATEGIC ADVANTAGES OF EXPERIENCE OPTIMIZATION
Beyond providing winning customer experiences, optimization delivers lasting value to your business and a huge competitive advantage.

Dollar for dollar, no other digital marketing investment provides the same financial leverage. That’s because experience optimization ups the return on investment (ROI) on everything else you do.

If you’re focusing marketing spend on bringing people to your site—through things like SEM, email, social campaigns, and more—why not do everything in your power to maximize the chance to turn those visitors into conversions and dollars? Optimizing the pages you send traffic is an easy way to drive more dollars from your current marketing efforts.
TOP FIVE REASONS TO Invest in Experience Optimization

Brian Cahak, VP of Business Development at Clearhead, a digital optimization agency, offers five reasons why digital marketing dollars should go toward optimization.

1. **Optimization creates an annuity stream**
   In contrast to pay-per-click (PPC) investments, a winning test can yield a sustained benefit far beyond the test duration. This annuity stream can, over time, generate very profitable, disruptive growth, and a very significant ROI.

   “When executed correctly, we’ve seen optimization provide up to 5x more ROI than PPC.”

   -Brian Cahak, VP of Business Development, Clearhead

2. **Optimization enhances collaboration across departments**
   Collaboration breeds trust, better communication, and joint problem solving – all the ingredients necessary to design and implement breakthrough experiences.

3. **Optimization is a strategic advantage**
   Few are doing it well... or at scale. Only 17% of top Alexa-ranked sites currently use an optimization platform. 87% of companies only run 1-5 experiments per month.

4. **Optimization makes an organization more customer-focused**
   No business is wiser than the collective wisdom of their customers.

5. **Did I mention the ROI?**
   The cost of optimizing is small when compared to the revenue lift gained from a win. Let's say you have a $100M e-commerce and improve conversions from 2% to 2.2%. That's $10M to your top-line revenue. Just from one test.
CASE STUDY: STANLEY BLACK & DECKER

Optimizing for Revenue at Stanley Black & Decker

Stanley Black & Decker is the Fortune 500 company behind industrial tools and household hardware brands including Black & Decker, Dewalt, Porter Cable, Stanley Tools, and Bostitch. SB&D has been optimizing experiences across the brand’s websites for more than two years, working with Viget, a digital marketing agency.

One recent experiment—a simple A/B test on the primary call-to-action (CTA) on Dewalt.com’s product pages—led to a six-figure impact in online revenue.

“There are no universal truths in marketing. The only way we can really figure out what works is through A/B testing and optimization.”

– Paul Koch, Marketing Strategist, Viget

The test compared two CTAs: a ‘Buy Now’ CTA versus a variation that read ‘Shop Now.’ The SB&D team hypothesized that ‘Shop’ was less committal in action, and would compel more customers to click the button.

After running the experiment, however, the team found that ‘Buy Now’ actually outperformed ‘Shop Now’—driving 17% more customers to click through.

This single decision had a six-figure impact in online revenue. Without testing, the team would not have been able to optimize for that outcome.
CASE STUDY: LIFTOPIA

Liftopia Boosts Revenue from SEM Campaigns by 24%

Ski deals site Liftopia uses SEM ads to drive visitors to pages in its purchase funnel. From there, they use experience optimization to make dollars spent on SEM more effective. Here’s one example.

In the past, pages in Liftopia’s purchase funnel offered numerous options for cross-sell. When visitors landed on a page from SEM, they had the option to either buy the results, search for new results, or click directly on other deals and offers. The team wanted to determine whether tailoring their funnel pages around the specific deal promoted in the SEM advertisement would drive more visitors down the funnel to purchase the package.

Since they knew what SEM-traffic was searching for already, they hypothesized that showing a tailored experience with exactly what visitors had searched for would increase purchases and decrease bounce rates. They tested it out, measuring whether the original or the variation converted more visitors into customers.

After just seven days, a statistically significant result emerged: the winning experience increased revenue from SEM campaigns by 23.7%.

“Optimization has taken the debate aspect out of design. We let our users tell us what designs are the best layout. If we have a question about what the best design is, we test it.”

–Dave Nuffer, Liftopia

Testing different purchase funnel variations helped Liftopia better understand how SEM traffic behaves and ultimately convert more visitors into customers.
ADVANTAGE #2

BUILD A STRONGER, MORE DATA-DRIVEN TEAM

The transformations made by optimizing extend far beyond your website, mobile site, and other customer touchpoints. Teams and individuals that practice experience optimization are able to align themselves around common metrics and goals. Decision-making is democratized, and all ideas have merit until they can be tested. Testing creates a recurring, consistent dialogue about what actions were taken, what the team learned, and what they plan to do next. This iterative process inherently improves internal collaboration and focuses the organization more on the customer and on data.

“There’s a lot of passion involved in nonprofits. We all have strong opinions and ideas about how things should be done. Optimization tells us, out of this mix, which is the best way forward.”

– Andrew Ng, Movember

With optimization, you and your team will be more efficient. More effective. And more data-driven.
5 WAYS TO BUILD
A More Effective Team with Optimization

1. **Focus efforts where they matter most, saving on precious time and resources**
Imagine a world where your team only focused on projects proven to drive impact. Optimization lets you to do just that. Winning teams optimize to improve the efficiency of existing traffic channels, test out new designs before hard-coding them, and validate early concepts for campaigns, products, and features. Optimization allows for course-correction if your experiments aren’t supporting your ideas. Plus, the ROI will pay for itself, and potentially free up resources for other areas needing investment.

2. **Avoid interpersonal conflict by putting differing opinions to the test**
Running experiments democratizes decision-making. Debates about the best design or messaging for a given goal can be put to the test.

“There used to be a battle of opinions in our company. The designer would get upset; the boss would intervene. But we don’t have a story like that anymore. No one is really committed to their version anymore because testing proves over and over again that the smartest people in the room are just wrong.”

― Elliot Kharkats, Web Analytics and Testing Manager, 1-800-Dentist

3. **Empower all members of the team to optimize their work and be data-driven in all they do**
Enable your team to make informed decisions and understand causal trends in your site data. Google Chief Economist Hal Varian advises: “Experimentation is the gold standard of causation.” Experimentation is essential for anyone looking to be more data-driven.
4. **Align teams around shared goals**
   A winning testing program has an explicitly defined metric to optimize towards. Putting a stake in the ground and prioritizing can be a difficult exercise to start, but will eventually help with not only your optimization cycles, but with internal alignment in general.

5. **Collaborate around hypothesis generation, test ideas, and execution**
   Open up research and brainstorming to team members with a wide array of perspectives and teach them how to construct hypotheses for testing. Optimization becomes a cross-team effort that increases the investment in seeing a test idea get set up and succeed. Make sure to include designers and developers in the process.
ADVANTAGE #3

BE THE MVP IN A GROWING FIELD

As a champion of experience optimization, you can lay claim to incremental improvements in conversions and the bottom-line contributions that each improvement has yielded.

You will take professional development steps toward becoming more informed in your day-to-day business decisions. Choosing data sources, and incorporating a balance of qualitative and quantitative data points into decisions, are invaluable skills that will inform how you approach problems on the web, in a product, or in marketing in general.

Plus, more and more businesses look to hire people with strong experience in testing, optimization, and analytics.
Krista Seidan is an experienced leader in the digital analytics and optimization industry. In her current role as a Product Marketing Manager at Google, she leads web analytics, reporting, testing, and optimization for the Enterprise Marketing team. She has evangelized optimization internally and expanded A/B testing efforts over 15-fold to the point where her team executes over 50 tests per quarter.

As more and more businesses look to hire people with strong experience in testing, optimization, and analytics, people like Krista Seiden are in high demand. We were curious to learn how her career has unfolded and hear her advice for others looking to enter into this growing field.

**Q**

To start off, tell us about your career in digital analytics. How did you arrive at where you are now?

**A**

I’ve had an interesting and diverse career spanning several companies and focus areas. I started out in the space as an internal practitioner at Adobe. In addition to web analytics, I focused on optimization and helped run several split tests for their core cloud product offerings.

After Adobe, I spent some time at the Apollo Group (parent company of the University of Phoenix) as a product analyst responsible for all digital metrics for their classroom social media platform and mobile apps. I built a skill set around UX testing and paired the qualitative data we received from user testing with quantitative data to tell a complete story. I then moved onto to Google where I currently run the analytics and optimization program for the Enterprise Marketing team. In this role, I manage implementation and high-level reporting for six core product offerings and run an A/B testing program which executes upwards of 50 tests/quarter.
What advice do you have for people looking to explore a career in analytics, testing, optimization, data application?

Get hands on—if you have a personal website or blog, get a free Google Analytics account and start tracking your site data.

Try running a simple A/B test on your own—there are several A/B testing tools which will help you do this with minimal effort (Content Experiments within GA and Optimizely are both great options).

Read blogs and Twitter feeds of the top minds in the industry.

Can you give an example of where your expertise had a particularly strong impact in your organization?

I’ve had the opportunity to guide several organizations through product and web development by adding the analytics and optimization layer to the equation. One example I like to give comes from my experience working on mobile app analytics at the Apollo Group. While developing v2 of our classroom app, I must have made 4 or 5 trips from San Francisco to Phoenix to sit in on UX lab studies for how students were reacting to and using the v2 app (throughout various stages of dev). After I attended those sessions I was able to better understand the data we were seeing on the analytics side. That deeper understanding led to several feature tweaks and enhancements in the v2 app. It was very powerful to see the combination of quantitative and qualitative come together to influence development to make a better experience for our students.
ADVANTAGE #4
TRANSFORM YOUR BUSINESS

In today's competitive market, it can be difficult to find a winning formula that simultaneously attracts new customers, serves current ones, and drives your business’ bottom line.

Optimization allows the people who matter most—your customers—to determine the way forward. Testing and optimization can identify user pain points, highlight key areas for business growth, and inform future product and organizational roadmaps.

Optimization translates to other marketing efforts. 

70% of marketers use optimization lessons to inform offline campaigns and other marketing communications.

(Source: MarketingSherpa)

CASE STUDY: UPWORTHY

Recommended Content vs. Social Sharing? Upworthy Lets Readers Decide

Viral video site Upworthy has built a thriving media business on optimization. From day one, the media company has tested everything—from headlines to content to site functionality—to ensure the site meets the unique (and changing) needs of its audience.

“We want people on our site to really enjoy it. Part of that is in curating exceptionally meaningful videos. But it’s also about taking the time to optimize every part of the experience for maximum shareability and satisfaction.”

– Peter Koechley, Co-founder, Upworthy

In the early days, Upworthy’s goal was to find people on social media and grab their attention, getting them to share back out to their social channels. But as Upworthy’s audience grew, the team realized...
that the site’s strong emphasis on social sharing was not keeping up with the needs of frequent visitors, who were looking for additional videos to peruse through. Users wanted to dig deeper, but there was no obvious way to get to a second piece of content. The team set out to find an effective way to change that.

They experimented with several different placements and designs of a recommended content module, measuring the impact on engagement and social shares across Upworthy’s site.

**An Optimized Way Forward**

After running the test for just a few days, the team uncovered some surprising results. The top performing recommended content module actually increased social sharing by 28%! It also dramatically improved sitewide engagement.

The team quickly built the new recommended content functionality into each content page on their site.

**By letting visitors make the final call, the Upworthy team was able to build an optimized experience that both expanded the website’s offerings and increased conversions.**
Optimization provides a clear understanding of what efforts will drive growth (and what things your customers could do without), enabling businesses to devote manpower to those projects that are proven to win.

“Testing pays for itself. With all the gains in conversions, in addition to how fast I can get a test turned around—literally the man hours I’m saving by not having to leverage the tech team as much—those are huge impacts to our business. It’s not just value creation, it’s also resource saving.”

– David Yeom, VP of Marketing, The Honest Company

Companies can test new features and designs to a subset of traffic, before building, implementing, and launching them to 100% of users. Under this highly efficient model, design and development teams only spend their time working on features and designs that stick.

“We ran a test where we found the learnings were contrary to our initial hypothesis. We were going to spend a lot of money on that particular program, but we learned in the end it wasn’t important to our customers. Testing helps you realign and rely on the data.”

– Eddie Castillo, User Experience Manager, Chrome Industries

This concept applies beyond web and mobile app design and functionality. Today’s leading companies test everything—branding, messaging, even new product offerings—to see what sticks, before devoting the resources to build, implement, and launch them to the public. Ultimately, optimization can inform the long-term product roadmap for your company, helping to identify, prioritize, and invest in areas that are proven to drive results.
SO WHAT ARE YOU WAITING FOR?

IT’S TIME TO TAKE ACTION

• **Take stock of your current marketing efforts.** What are your biggest goals? What challenges are you trying to tackle? Where can experience optimization drive results?

• **Get buy-in from teammates and executive sponsors.** Here are six stats to help you make the case.

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6 KILLER STATS TO SELL YOUR CEO ON OPTIMIZATION*

01. **You’re already spending money to drive traffic to your site.** But then what? For every $92 marketers spend to drive traffic to their website, only $1 is spent on optimizing the experience visitors see when they arrive.

02. **Average conversion rates are low.** The average conversion rate for an e-commerce website is 3%. For a SaaS site it’s 7%. And for media, it’s 10%.

03. **You can easily do better.** A/B testing is the most used method for improving conversion rates. Companies whose conversion rates improved last year are performing, on average, 50% more tests and using 47% more methods to improve conversion.

04. **Successful brands and companies have seen huge wins.** President Obama raised an additional $60 million using website optimization. Smartwool boosted revenue per visitor by 17%. The Guardian increased subscriptions by 46%. ComScore increased leads by 69% with optimization.

05. **Don’t get left behind.** 85% of search marketing professionals will focus more on conversion rate optimization this year.

06. **Listen to your audience.** 44% of CMOs use their website for customer research, using tactics like A/B testing and experience optimization.

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• **Find the right optimization solution for your business.** Depending on your company’s size, budget, team structure, and technical know-how, you may choose to buy a testing software, hire

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*Sources: The 2012 Conversion Rate Optimization Report (Unbounce), Event 360, The State of Paid Marketing (Hanapin Marketing)*
a consultant or agency to test for you, or build your own testing tool. There’s no “wrong” choice—your decision will depend on what makes the most sense for your business.

• **Assemble your optimization dream team.**
  Testing teams come in all shapes and sizes, and, like choosing an optimization solution, your team structure will be determined by a number of factors specific to your business. Check out the Roadmap to Building a Data-Driven Optimization Team to learn more about options for your organization.

• **Deliver optimized experiences to your customers.**

Today, winning companies know that delivering the best possible online experiences is not only advantageous – it’s essential. Using experience optimization to serve up high-converting visitor interactions will help generate more revenue, higher audience engagement, improved lead acquisition, and most importantly, happier customers.
MORE RESOURCES

A/B Testing and Optimization on Native Mobile Apps
Learn how top app developers create experiences that retain and grow users. It’s never been more important to have a mobile app optimization strategy.

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

Building Your Company’s Data DNA
Identify and use the right metrics to delight your customers, engage your audience, and grow your business in this guide, with worksheets and interviews with Qualaroo and KISSmetrics.

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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 build and run experiments that help them make better data-driven decisions. With targeting and segmentation, and powerful real-time data, Optimizely meets the diverse needs of any business looking to deliver optimized experiences to their visitors.

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