A/B testing, website optimization, conversion rate optimization, similar subjects have gained slow but steady traction in recent years. Maybe you've done some cursory research, heard stories from the front lines, or dipped a toe in and tested yourself. Perhaps you've made great strides in building a testing program at your workplace, and are looking to expand your efforts and scale testing to more advanced levels.

The Roadmap to Building a Data-Driven Optimization Team
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Introduction

Why should I read this roadmap?

- Why should I focus on testing?
- How will my team benefit?
- What is building an optimization culture?

A/B testing, website optimization, conversion rate optimization, and similar subjects have gained slow but steady traction in recent years. Maybe you've done some cursory research, heard stories from the front lines, or dipped a toe in and tested yourself. Perhaps you've made great strides in building a testing program at your workplace, and are looking to expand your efforts and scale testing to more advanced levels.
At Optimizely, we encounter questions about testing adoption and success on a daily basis. We've noticed a few trends and best practices that our best customers adopt and evangelize. We've also seen the pitfalls of haphazard or incomplete optimization programs. The purpose of this guide is to enable you and your organization to become more productive and data-focused through testing successes, complete with examples from our own conversion rate optimization (CRO) program and from some of the leaders in the optimization industry.

Beginning to test your website, marketing, or product is not just the introduction of a new piece of software or productivity tool to your workflow. Optimization has the potential to impact how you make day-to-day decisions and run your business. To be successful, you must treat your optimization program, new or existing, with the gravitas you would assign to any new method of doing business—like your product team adopting the Lean Startup methodology. Investments in CRO extend beyond choosing a testing platform—the people in your organization and the processes by which optimization is adopted and evangelized are crucial to your continued (and compounding) success.

There are also many different paths to building an optimization team and culture. Depending on your available resources, testing proficiency, and propensity for data in company culture, the adoption curve for testing will vary. We'll explore a few different testing scenarios where we've seen success, and provide recommendations for your team and ability level.
Why should I focus on optimization?
Optimization is an opportunity to transform an existing web property from an average asset to a key part of your business funnel.

At Optimizely, we've seen that companies who leverage optimization to improve their web presence outperform competitors and exceed even their own expectations. In key industries, companies leveraging a testing platform* have discovered site improvements that led to 29% more page views for media sites, 21% more revenue for e-commerce companies, and 17% more customer engagement for software companies.

"We’re maybe as good as a coin-flip at guessing what's going to be best for our users. We rely on testing to just make better decisions. People are really fascinating and interesting ... and weird! It's really hard to guess their behaviors accurately."

Peter Koechley, Upworthy

At Optimizely, we've seen these transformations happen not only for websites, but for the people behind them. As a champion of optimization, you can lay claim to incremental improvements to your website and the bottom-line contributions
that that improvement has yielded. For many conversion rate optimizers, an incremental lift of 1-2% can translate into thousands, if not millions, in additional revenue. If you’ve ever been frustrated by a drawn-out deliberation over a website or product feature, disappointed by low conversion rates, or speculated about why you’ve ‘missed the mark’ with a certain feature or campaign, consider putting your questions to the test.

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

*Data taken from a 2013 survey of Optimizely customers across e-commerce, media, and SaaS industries.

**How will my team benefit?**

Teams that practice CRO are able to align themselves around common metrics and goals. Decision-making is democratized, and all ideas have merit until they can be tested. You and your team will be able to:

- Shorten meetings by avoiding deliberations
- Avoid interpersonal conflict by putting differing opinions to the test
- Empower all members of the team to optimize their work
- Align teams around shared goals, rather than conflicting ones

The concept of a controlled experiment can be applied to almost any stage of the sales, marketing, or product funnel:

- Sales, support and other client-facing roles can test messaging, times of day, and subject lines for communications to determine which performs best. A “request for demo” or “call for support” CTA on your website can be optimized to increase inbound requests from customers.
- Marketing can test display ads, landing pages for marketing channels, website calls to action, social sharing buttons, and more.
- Product and engineering teams can test user flows, paths to purchase, in-product messaging, and more.
**What is building an optimization culture?**

To build a successful CRO program, there are three necessary components. All of the best practices, tips and tricks to building and maintaining a optimization culture can be sorted into the buckets: Platform, People, and Processes. We’ll seek to address some of the common questions we hear at Optimizely about testing, including:

**Platform**
- How do I choose the appropriate tool for my needs?
- Who should be involved in choosing a platform?
- How do I justify the cost of purchasing a product for CRO?

**People**
- Who should be responsible for optimization at my company?
- Do we use a centralized or decentralized approach to structuring a CRO team?
- How does optimization fit with the goals of each person or team?
- If I bring in a new employee to direct CRO, how do I hire the right talent?
- If I encounter objections when bringing CRO into my company, how do I handle them?

**Processes**
- How should my team communicate about optimization?
- How are test ideas collected, documented, and prioritized at the team and company level?
- How are results from experiments shared?
- How do I evaluate my CRO success to demonstrate return on investment (ROI)?
- How do I maintain consistent momentum and enthusiasm for CRO?
Choosing the ideal optimization platform is not the only step of your journey, but it is an essential one, with many considerations. There are three options:

1. **Buy** an out of the box solution, typically a Software-as-a-Service (SaaS) product that integrates with your analytics solutions.
2. **Hire** an agency or consultant to take on the processes of vendor selection and/or testing.
3. **Build** your own optimization platform from the ground up.

The choice is yours (and your team’s)
Option One: Buy

Let’s talk about what you get when you buy a testing platform. Most follow the Software-as-a-Service (SaaS) model; in other words, you won’t download anything or purchase a physical product. Rather, integration happens as easily as a one-time copy-and-paste onto your site, after which you access the software through the web and your tests and data live in a cloud environment.

Buying a testing platform makes sense for a range of group sizes—individuals, small companies, and large companies—because of the wide variety of plans with varying functionality and price points. SaaS solutions offer a number of advantages:

- **Built-in features**: An obvious advantage of buying a testing solution is that advanced testing features are included in your purchase. (You can, for example, target visitors from Facebook who see one variation, and compare them to Twitter visitors who see a different one.) Commercial testing software is typically purchased as a subscription and many platforms offer multiple subscription tiers, with additional built-in features available in higher tiers.

- **WYSIWYG editing**: Leading SaaS optimization platforms enable marketers, advertisers, designers, and other non-technical users to easily create and test page variations, using a visual what-you-see-is-what-you-get (WYSIWYG) editor that doesn’t require writing any custom code.

- **Trustworthy reporting**: Accurate and reliable statistical reporting and calibration are essential for any data-driven organization. When you purchase an off-the-shelf testing solution, you’re buying something teams have spent time building, optimizing, and debugging. You can therefore trust them to give you accurate results about how your tests performed. What’s more, these platforms are constantly being tested by the thousands of clients using them.

- **Professional support**: Most A/B testing platforms offer some form of dedicated technical support, and some even offer additional consulting services (for an additional charge). Technical support is especially important for teams in which non-technical users are driving the testing process.

- **Community**: When you sign up for an A/B testing platform, you are joining an existing community of users who are available to answer questions, give technical support, and suggest best practices.

Another important consideration when thinking about whether or not to buy an optimization solution is the innovation that the software vendor will deliver. New features and improvements to the platform, as well as big-picture ideas and developments in CRO, should be addressed by your vendor.
SaaS Evaluation Checklist:

Questions to Ask When Considering Optimization Software

- Does the platform integrate with other tools I already use?
  - Analytics
  - Data management platform
  - Customer engagement

- Does it meet my budget?

- Is scaling plan level up or down based on feature needs an option?

- Does the platform offer features that will enable users to run tests on their own and eliminate bottlenecks?

- How well does my team gel with the platform provider’s team and support approach?
  - Is support included in the contract?
  - Does the vendor offer 24 hour support?
  - Are they available by phone or email?
  - Will they support technical requests to help you run complex tests?
  - Will they work with you to brainstorm ideas and provide advice?

- References and community
  - Do they have a public list of clients in my industry?
  - Do they have accessible resources for answering my own questions?
  - Are there reviews in social channels (LinkedIn, Twitter) for their product?
  - Do they host events and forums for peer networking and problem-solving?

- Does the vendor have an innovative vision that matches my own? Will they be a good long-term partner as I grow my optimization program?

During a SaaS vendor selection process, you’ll be able to think about the top priorities for your company—maybe a specific set of features to do targeted testing, or a very user-friendly platform—and choose a vendor that most closely aligns to your long-term plans. Choose a solution that you feel will be a strong partner and advocate for your team moving forward.

Ultimately, the choice of product should come down to both ROI and long-term vision. Determine whether the gains achieved by regular testing will outweigh the usage fees paid for the platform.

Balance any budget considerations you might have with an evaluation of the long-term partnership—is this software company one that you see your team working with over the coming years? Will they advocate for your interests and needs, and be able to support your program as it grows?
Option Two: Hire

The next option is to hire an agency or an optimization consultant to run CRO for you. An agency is a service independent from the client that provides an outside point of view on how best to sell the client’s products or services—or in this case, optimize the client’s website. Most digital marketing agencies are quickly adding A/B testing to the list of services they offer; they’re also partnering with testing platforms in order to use them on clients’ websites. Companies can hire agencies or consultants as short or long-term solutions for testing.

There are myriad reasons to outsource testing. For instance, a company that doesn’t have the internal resources to allocate to testing will instead choose to hire another entity to take care of all strategy and testing implementation. In another scenario, a company might have the bandwidth for ideating tests but lack the technical know-how to execute them. In this case, they’d work with an agency to implement tests. The reverse is also common, that is, for a company to purchase a testing platform and work with a strategic consultant to come up with test ideas.

If you outsource any part of testing—either the creative or the actual execution—then there are a few things to look for before you sign a contract:

**History of success:** Ensure that the third party has a good track record with optimization strategy and implementation. Ask for a reference call from previous customers, or look for case studies demonstrating their previous successes.

**Platform and technical expertise:** They should be experts in each testing platform they offer (ideally they support multiple) and provide technical support should you need it.

**Contract structure:** With many agencies you’ll pay the agency per-hour or per-experiment, and some also offer “unlimited” or “constant” testing programs: for a fixed price they conduct an unlimited number of tests within an overall program. Compare plans and think about what will work best for your needs before signing on.
Option Three: Build

Building a testing solution in-house is a viable option for organizations that have significant engineering resources available. We’ve found that most companies don’t decide to suddenly build a testing tool from scratch without an engineering team that’s closely tied to the process. A homegrown testing tool is usually something that organizations add on to an already established data-gathering and analytics machine.

Because this solution requires substantial engineering effort, it’s rare for small companies with limited technical resources to pursue this path. Typically only larger teams with specialized needs and enough dedicated resources to pull it off will build a solution for themselves.

When seriously considering the option to build an in-house testing platform, make sure to calculate not only the resources needed to build the solution, but the long-term allocations for maintenance and updates to the platform. Keep in mind that this type of solution may constrain the types of employees that are able to use the platform to run tests by themselves—this could create dependencies for non-technical members of your team who want to run experiments.

The Choice Is Yours (and Your Team’s)

It comes down to a tradeoff between investing time and training in building a team internally, or investing money in an agency. The decision need not occur in a silo; in fact it behooves you to anticipate pushback from your team and invite them to be part of the decision-making process. In order for optimization to become a viable solution for your company, everyone needs to trust the data that comes out of a testing platform. The best way to ensure this is to involve others in the process of choosing the solution. Choose stakeholders from various teams to take part in the platform selection process: representatives from a usability or IT team, for instance. Also begin to solidify buy-in up the chain of command (see “Executive Sponsor”).

If a couple of people don’t trust what the optimization platform proves to be true, the entire discussion will center around questioning the validity of the data rather than what the data means. If everyone has approved the platform you’re using, then actually testing will be much easier.

The good news is that “all roads lead to Rome.” No matter which route you choose, you’ll be taking your first step on the road to a better website and a better user experience.

Sometimes, large companies with specialized needs and large technical teams will build a testing solution in-house: Amazon, Google, Facebook and LinkedIn all use proprietary platforms to run tests.
## Buy, Hire, Build Cheat Sheet:

### Choosing the Ideal Optimization Solution for your Organization

<table>
<thead>
<tr>
<th><strong>Buy:</strong></th>
<th><strong>Testing Needs</strong></th>
<th><strong>Considerations</strong></th>
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<tbody>
<tr>
<td>Integrations with analytics programs</td>
<td>Does the product integrate with tools I already use?</td>
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<tr>
<td>Feature flexibility: ability to scale testing program up or down</td>
<td>Will the pricing for the tool fit my budget?</td>
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<tr>
<td>Support for deployment, continued testing, or troubleshooting</td>
<td>Will the features available suit my level of testing proficiency (now and in the future)?</td>
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<tr>
<td><strong>Hire:</strong></td>
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<tr>
<td>No team member to spearhead testing</td>
<td>Would multiple teams use the product? Would some non-technical teams use a WYSIWYG editor?</td>
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<tr>
<td>Lack of resources to maintain CRO internally</td>
<td>Does their support plan and overall approach gel well with my team's needs and outlook?</td>
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<tr>
<td>Need ideas and help prioritizing them</td>
<td></td>
<td></td>
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<tr>
<td>Need technical implementation expertise</td>
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<tr>
<td><strong>Build:</strong></td>
<td><strong>Testing Needs</strong></td>
<td><strong>Considerations</strong></td>
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<tr>
<td>Integration with proprietary internal systems</td>
<td>Do I have the budget to support the building, maintenance, and updates to this platform?</td>
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<tr>
<td>Tight integration with build/deploy systems</td>
<td>How will the reporting integrate with our other analytics tools?</td>
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<tr>
<td>Experiments require complex server-side logic</td>
<td>Will this tool be accessible to other teams outside of engineering?</td>
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<tr>
<td></td>
<td>What internal support will be needed to run experiments?</td>
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*Hiring circumvents growing an optimization competency internally. Consider using an agency to get started, training the team and helping secure a platform for testing*
Consider what part you play in bringing testing to your organization, regardless of whether you’ve tried optimizing before. If you’re just getting started, there are a few steps to take to get your program off the ground. Have you been testing for a while? Let’s double-check best practices and provide a few tips for accelerating and expanding your program.

02. The People

Who will own optimization?

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How Data-Driven is your Organization
Being an Evangelist
[Advanced] Handling the HiPPO
How to Organize your Optimization Program
Chosing the Right Team Structure
[Advanced] How to Hire for Optimization

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Consider what part you play in bringing testing to your organization, regardless of whether you’ve tried optimizing before. If you’re just getting started, there are a few steps to take to get your program off the ground. Have you been testing for a while? Let’s double-check best practices and provide a few tips for accelerating and expanding your program.
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

**Evaluation: How Data-Driven is your Organization?**

There is a practical side to the success of optimization at your organization, and success depends not only on the experiments themselves, but equally on the adoption of CRO as a cultural practice in your organization.

Testing is a powerful tool for advancing your business because of the data it provides. Every test is an experiment that will either support or contradict a hypothesis about your website, customers, audience, and their preferences. Conversely, there will be times where you or a team member has a deep seated belief about changing part of your website or product that yields inconclusive results—the new version made no difference.

The impact of data at your organization depends upon your current aptitude for the stuff. Think about it like your daily servings of fruits and vegetables. Maybe you’re a juicing guru, drinking your greens like water. Perhaps you dutifully count your servings, because you know you should, but don’t embrace them like you could. Teams that are already in the practice of incorporating data into their decision-making processes adopt optimization much more easily than those that make decisions based on gut, instinct, or “industry experience” alone.
The Roadmap to Building a Data-Driven Optimization Team

02: The People

Quiz:

The Data Diet — How Much Do You Consume?

01 ___ True or False? I can quantify how and why my customers churn.
02 ___ True or False? I ask questions like, “What do the data tell us?” discussing design, strategy, or other decisions about creative.
03 ___ True or False? I know the conversion rates for my customers by marketing channel.
04 ___ True or False? I prioritize investment in customer acquisition channel by ROI.
05 ___ True or False? I have calculated the lifetime value of my customers.
06 ___ True or False? I have invested in maintaining the quality of the data my team / company collects.
07 ___ True or False? I value transparency at every level of my company.
08 ___ True or False? I use reporting from my internal systems to make projections about team and product performance at my company.
09 ___ True or False? I am aware of the current conversion rates on my website.
10 ___ True or False? I regularly report on key performance metrics with my team.
11 ___ True or False? I feel like I must understand the business impact (ROI) of the projects I am working on.
12 ___ True or False? Uncertainty does not intimidate me.
13 ___ True or False? I learn from my mistakes.
14 ___ True or False? I never make a business decision based on intuition alone.

Score your quiz: Count the number of "true" responses. Which are you?

01-05: Intuition Indecision. You’ve grown accustomed to making decisions with a handful of people in the room, deliberating back and forth over which changes will be beneficial to to goal at hand (if there is one). Start moving your company towards a more data-focused mindset by reading up on CRO terms and ideas, and by outlining a funnel on your site with corresponding conversion numbers.

6-10: Bits, Fits and Starts. You and your team members use data points sporadically to help support big decisions, but the day-to-day decisions are left up to intuition. Start to bring data points into weekly meetings, or try a simple A/B test on a piece of marketing collateral (like an email) to demonstrate the power of testing different variations.

11-14: Data Dynamo. Score! You’re in the habit of using data to inform decisions large and small. You can continue to improve your data mindset by spreading the data craze amongst other members of your team—try to enable other testers within your organization, and use optimization to inform larger projects, like a website redesign.
Being an Evangelist: Bringing Optimization to your Organization

Conversion rate optimization starts with one person. It’s a seed of an idea, generally well-received and deemed worthy of consideration by the business. The ROI implications add up. Test ideas begin to formulate. This is something we should be doing.

The stakeholders explore platforms, conduct their research, build out a business case. Budget is allocated, a solution is purchased. Then it sits, accumulating dust. Perhaps you didn’t make it as far as purchasing a platform—you’ve raised the idea of CRO to your team, but the project has been deprioritized for various reasons.

When bringing a testing proposal before your team, you should expect and anticipate pushback, red tape, and hurdles in your path. This is common, and a natural part of navigating a new business process. Here are a few common hurdles to building a testing team (and their actionable answers).
Cheat Sheet:
Common Objections to Testing and How to Respond

“I'm having trouble...”

“... making a business case for CRO”

Suggestions

- Collect key conversion metrics along the customer acquisition funnel (metrics will vary based on industry)
- Determine what a 1% lift would translate to down the funnel and over time

“... with teammates who think our current conversion rates can't be improved”

Suggestions

- Consider doing a complete redesign and testing through the progress
- Try something like totally collapsing a funnel on your website
- Shift the conversation from minute conversions to something with greater overall business impact
- Reframe the conversation to focus on gaining customer insights

“... bringing data into an organization that's driven by intuition”

Suggestions

- Start with a very small test idea
- Approach optimization as a strategy for validating intuition with data
- List 5 basic questions you don't currently have the answers to that you think you could answer with testing
- Be persistent in asking “why?”
## “I’m having trouble...”

<table>
<thead>
<tr>
<th>“... with stakeholders who are questioning the data from the testing platform”</th>
<th>“... securing resources for a testing program, even though I’ve already made my case for testing”</th>
<th>“... with identifying the right person to spearhead testing”</th>
<th>“... getting permission to test the homepage of my website”</th>
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</thead>
</table>
| • Express that exact numbers matter less than relative numbers  
• Emphasize that tracking consistently is more important than the numbers matching exactly | • Propose a small, lightweight program to get started  
• Conduct the smallest test requiring the fewest resources  
• Keep running small tests until you get a win that gets the team excited  
• Walk the team through a case study of how long it took, identify bottlenecks, and demonstrate the value of running that experiment | • Ask if that person is organized, or if they have strong management skills  
• Ask if they have an understanding of basic statistics, including terms like baseline, calculating conversions, statistical significance, etc.  
• Determine if they have a natural curiosity | • Include stakeholders for the company homepage in the planning stages of building your testing program  
• Leverage stakeholders’ input in the choice of testing platform to build their buy-in  
• Begin testing on a smaller domain or lower traffic page to demonstrate testing wins |
It’s your turn: What challenges are you facing?

My main **business** challenge is ____________________________.

The hardest **organizational** challenge to overcome is ____________________________.

_____________________ is my biggest **resource** constraint.

Talk about your challenges and make them known so more people can be part of finding the solution. We’ll address some of these steps in the “Processes” section of this book.
The Executive Sponsor
Securing resources for testing will often depend upon the sign-off of a manager or key executive. This person will not only evaluate the program’s viability upfront, but will also be key in selecting the person or team to lead optimization. An executive sponsor could also be the bridge between an optimization team of one and creating a larger CRO program. In order to secure an executive sponsor for your testing program, follow these steps:

01. Selection
Choose the proper executive. This person should have access to budget, stake in key online properties, and an appreciation for data.

02. Research
Make the most of your executive’s limited time when asking for their support of your optimization program. To do so, determine what key points will most pique their interest, like understanding of the purchasing process, demonstration of ROI, and an understanding of their business objectives.

03. Build Allies
Discuss with other key partners or likely stakeholders to gauge an initial reaction to the idea of an optimization program. This preparation for the “ask” meeting will provide you and your executive with a sense of who your allies and potential roadblocks will be.

04. Make 'The Ask'
In your proposal or presentation to your desired executive sponsor, make sure to include a plan for your testing program, key areas where you would begin experimenting, and research of available optimization platforms. Allow for objections, questions, and discussion of next steps.

5. Follow Through
Once you have secured the support of your executive sponsor, take the appropriate next steps to put your plan into action. Modify and agree upon a time frame, metrics to evaluate the success of the program, and bring in other stakeholders to move the optimization program forward.

“Appeal to your sponsor to help advance the optimization effort when you need to move past roadblocks, and leverage their support to help spread testing internally (See "Create Excitement" in Section 3).”

Bryan Gumm, Netflix Experimentation Platform Manager
The Team: How to Organize Your Optimization Program

There is no one 'best' way to build an optimization team. There are many considerations and stakeholders that will affect the best way to scale testing at your efforts. The team is also dynamic. Consider how you want to evolve your optimization program if you are already testing, and what capacity for testing you'd like to reach as an organization.

CRO is by its nature collaborative and interdisciplinary, straddling traditional departmental lines: marketing, product management, engineering, and design. As a result, the adoption and long-term success of testing requires thinking about how it will fit into your company, not just philosophically and culturally, but organizationally. In this chapter we'll explore four different approaches and look at how different organizations have worked testing into their organizations.

01. The Team of One

What we have heard again and again from the companies we've worked with is that no matter how large or small the team of people performing experiments is, at least one person has to live, breathe, and evangelize optimization.

For most organizations, it will be most realistic to have one person serve as the appointed conversion rate optimizer (CRO). For this individual, testing will not be their only responsibility, and it will support their other day-to-day responsibilities.

Your A/B testing point person won't be effective in isolation. They'll need allies across your marketing department and your engineering and product teams to be successful. This is not only because of the help they can provide in generating hypotheses and implementing experiments, but also because they're key in ensuring that testing is a regular part of the product/marketing/design planning process.

Here are a few key considerations for a testing hero who acts alone:

- **Starting Small:** Focus on addressing the easiest and most straightforward tests first
- **Sharing the First Win(s):** When the CRO discovers a testing "win" (a lift that will get others excited), the CRO should share that result widely with the team, and provide context.
- **Focus on Enablement:** A WYSIWYG editor for conducting A/B and MVT tests may be essential if the CRO is not a web developer or designer.
- **Developing Documentation:** Any form of testing documentation will help to prepare the program to scale. Documentation of tests run is institutional knowledge that should be shared and archived for future reference.
- **Traffic and Ability to Run Tests:** The CRO will only be able to test as much as there is traffic to do so. In the case of a low-traffic site, the CRO may only need to run a test once every couple of weeks.

A few potential downsides from having a sole CRO:

- **Lack of Resources:** The CRO may have to "beg, borrow, steal" development and design resources.
- **No Ideas to Test:** With only one person devoting brainpower to testing, it can be difficult to keep up a long queue of productive test ideas. Sometimes, involvement from teammates within the organization could be needed to come up with new ideas. Try circulating a form soliciting test ideas to the company.

★This person may not be the same as the evangelist that brings testing to the organization; in the case that you would like to appoint an optimization owner, see "How to Hire for Optimization."
For the CRO to increase the scope of the optimization program, he/she should begin to get others involved in the testing process and share experiment results more widely. Solidifying an executive sponsor is an important bridge between one person acting as a CRO and building an optimization team.

If the CRO wants to bring additional resources on board, they can start by training other members of their team on the testing platform, bringing them in as collaborators to share the testing workload. See “Creating Excitement” in the “Processes” section for other ways to drive interest in optimization internally.

Upon entering the phase of optimization where multiple people are testing, it is important to consider which structure of team you would like to use for testing, to ensure a smooth transition and capitalize on a structure that will best suit your organization long-term. There are two simple categories for these types of teams: centralized and decentralized.
02. The Centralized Team—The Ringleader

The centralized team places the responsibility of testing in one CRO (conversion rate optimization) specialist. This person is responsible for soliciting, brainstorming, prioritizing, and deploying all tests. The CRO will coordinate across all departments that may want to test and secure the resources needed from design or engineering teams to get tests up and running. They are also responsible for communicating testing wins to other team members and stakeholders. Depending on the size of the organization and the amount of traffic to the website, this role could be a full-time position.

At Optimizely, we have employed a centralized approach to testing, with many additional employees utilizing the testing platform. We communicate all changes to a centralized listserv when tests begin. The CRO sets the agenda for which tests will run and in what order. They also solicit ideas and share test successes or failures. See more about Optimizely's CRO organization in the “Processes” section.

The benefits of using a centralized team structure:

- Clarity and consolidation: Testing is a one-stop shop. Anyone in an organization with a question or idea related to testing knows who to direct it to.
- Developing a specialized competency in one individual means that person will eventually, if not immediately, be an in-house testing and CRO expert.
- Fewer debates and stakeholders involved in testing.

The downsides of using a centralized team structure:

- Potential for turnover and loss of institutional knowledge.
- One person can become the bottleneck for testing ideas.
- Not diversified enough when collecting stakeholder input.
- The CRO lacks the ambition to scale optimization to the entire company, and does not empower others to test or volunteer their ideas.

03. The Decentralized Team—The Fellowship of CROs

The alternative method for scaling a single CRO into a wider optimization effort is to build a decentralized testing structure. In this scenario, the CRO becomes one of a group of individuals that each has equal testing ownership and responsibility.

Twice a week, the vice presidents of product and product managers meet for strategy meetings to review and analyze test results and vet ideas for future tests. Then, every six to eight weeks, there's a Customer Science Meeting with our CEO and all of the C-levels. We present what we're testing, what has been rolled out, and what is testing and is not being rolled out because it didn’t work.

-Bryan Gumm, Manager of Experimentation for PS3 and Wii consoles at Netflix

for a different team or division. For instance, a company could have a CRO lead for the marketing, product, design, and sales teams. They share a test roadmap and communicate regularly to share best practices and set the time for tests that will deploy to the website to ensure there are no conflicts.
Previously most of our testing had resided within our development team. Part of what we were eager to do with Optimizely was really to move that into the hands of people who had a more direct stake in that particular page or area, to be able to make those changes themselves and then bring a data-supported request to development as opposed to just submitting the test and waiting for the result.

David Harris, Senior Internal Business Systems Analyst at CareerBuilder

Key benefits of a decentralized model:
- Allows for greater independence, and reduces the potential for an organizational bottleneck, as each team can be testing its own part of the site in parallel
- Grows the optimization skill set in many places throughout the organization
- Creative cross-pollination: teams that find success in one testing method or idea can encourage other teams to try similar experiments on their properties

Disadvantages of a decentralized testing team:
- Separate testers face the challenge of staying coordinated and in communication about their results and best practices.
- Maintaining consistency across teams in terms of process and caliber of talent.

04. A Combined Centralized and Decentralized Team—The Kingdom
In this approach to testing, a lead CRO coordinates among department-level appointed CROs, and owns a testing roadmap that spans an entire organization.

Everything is optimized, and all teams are aware of and optimize for their department or product-level conversion metrics.

The lead CRO is responsible for balancing internal conflicts between conversions that are at odds. For instance, a media company may have an advertising team that wants to optimize for pageviews, while a user experience team at the same company wants to optimize for length of time on a page, and encourage readers to peruse complete articles. A test that each team runs has the potential to negatively impact the other team's success, since they are evaluating different goals. The CRO must mediate and determine the relative priority of each goal and related test(s). This utopian approach to optimization is only realistic for organizations with high volumes of traffic and many web properties or products. In this scenario, there is a benefit to optimizing all facets of the company’s online presence, and plenty of traffic bandwidth to do so. It behooves the organization to run a coordinated testing effort that will be sustainable across all departments without letting testing run unchecked at the department level.
The Team:

Team Structures

**Army of One:**

**The team:** You and your website.

**The testing scenario:** You get a small to moderate amount of traffic, which will surge when you get media mentions or run a PPC ad campaign.

**Recommendation:** Start with low-hanging fruit, like optimizing calls to action or forms on your website. Be strategic about which experiments you run, since you may try fewer overall tests.

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**The Ringleader:**

**The team:** An optimization point-person that leads optimization efforts across multiple teams/departments.

**The testing scenario:** The lead CRO manages the experiment queue, in addition to execution and documentation of all tests. They are the internal champion of testing.

**Recommendation:** Take care to balance stakeholders early and often. Source experiment ideas from across the company.

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**The Fellowship:**

**The team:** A group of CROs who share knowledge and coordinate common objectives.

**The testing scenario:** Balanced approach that will resist turnover and transitions, but could create inconsistencies if not properly coordinated.

**Recommendation:** Ensure CROs meet regularly and can collaborate easily on the testing platform. Develop best practices for processes like documentation to ensure consistency.

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**The Kingdom:**

**The team:** Many teams have appointed CROs, led at the director or executive level by a strategic CRO.

**The testing scenario:** The utopian ideal for large organizations. Testing happens at the department level, coordinated by a lead CRO.

**Recommendation:** Apply this structure when there is a need for many CROs at the product or brand level, in addition to testing representation at the executive level.
[Advanced] How to Hire for Optimization

You may find yourself in a position where you want to expand your testing program by increasing headcount. In doing so, you'll need to seek out individuals with a specific set of core competencies to ensure that you have the right person(s) to lead testing across your company and yield fantastic results.

Regardless of whether you're looking at hiring new talent or growing optimization experts within your organization, these guidelines can be used to identify and recommend the correct person for the role of CRO.

Core competencies to look for:

- **Creativity**—Identify an individual that will find innovative ways to reimagine your website.
- **Curiosity**—This person should always be asking “why?” and be relentless in their search of answers through data.
- **Analytical Thinking**—A basic understanding of statistics and how to position results in context will be invaluable.
- **People skills**—They will need be able to bring key stakeholders on board, and have the charisma to spread testing excitement internally and enable others to test.
Hiring Cheat Sheet:

14 interview questions for hiring for your optimization team

<table>
<thead>
<tr>
<th>Question:</th>
<th>Context:</th>
</tr>
</thead>
<tbody>
<tr>
<td>01: Can you describe your experience with optimizing websites?</td>
<td>Debunk whether the “website optimization” line on their resume is tied to concrete experiences. They should also be able to articulate their testing experience in terms of process, their own best practices, organizational culture, and the eventual successes they were able to secure.</td>
</tr>
<tr>
<td>02: Can you describe your level of experience with HTML and CSS? Can you describe what Javascript is and or an example of where it might be used?</td>
<td>Many optimization consultants don’t have a deep technical background: this is OK. They still need to be able to work with developers and &quot;speak their language.&quot; They will need to have enough of an understanding of how web pages are built to have a rough idea of the level of effort required to execute a given test idea.</td>
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<tr>
<td>03: What are your biggest pet peeves with websites?</td>
<td>Learn about what the candidate finds the biggest hurdles are for visitors to websites. What stops them from converting? This demonstrates empathy for the end-user or customer they will be addressing.</td>
</tr>
<tr>
<td>04: How do you come up with test ideas?</td>
<td>This will help to understand if the candidate has a few random ideas, or if they have more of a systematic way of approaching testing. Avoid bringing in a CRO that could run out of test ideas after a few months’ time.</td>
</tr>
<tr>
<td>05: What are the limitations of A/B testing?</td>
<td>Sometimes recognizing the issues A/B testing can’t solve is just as valuable as recognizing the issues it can solve. Look for answers that highlight that A/B testing can’t always tell you what your business objectives should be.</td>
</tr>
<tr>
<td>06: What is your experience with project management?</td>
<td>Not every test can be set up in minutes. Some require working with several different teams from IT, web design, and product, to marketing or finance. A CRO who is disorganized may not be effective in driving an optimization process.</td>
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</table>
### Question: How do you determine when to stop an experiment?

**Context:** In the event that an experiment yields inconclusive results, you'll need the CRO to interpret the conditions of the experiment to determine when to stop and how to avoid the same outcome in the future. They should demonstrate knowledge of margin of error, volatility, accuracy, and bias.

### Question: Describe the roles of qualitative and quantitative data on the optimization process.

**Context:** A big-picture understanding of how best to deploy experiments relies on a combination of these two types of data.

### Question: When do you employ a multivariate versus an A/B test?

**Context:** Demonstrates an understanding of two test types and the benefits of using each, as well as the constraints.

### Question: Case Study: Provide a website and ask for a critique.

**Context:** Ask the candidate to look at a website on the fly with you and do an assessment of what to change. This will give you a sense of their ability to not only analyze a website from an optimization perspective, but assess their presentation skills as well.

### Question: What is one thing you learnt from a failing test?

**Context:** Experiments will, from time to time, not perform as hypothesized. The ability to frame and clearly communicate this piece of information in a positive light is an important CRO skill.

### Question: How do you prioritize experiment ideas?

**Context:** In the answer to this question, you're looking for the candidate to show a strong understanding of which tests will yield the best ROI.

### Question: How do you share and create excitement within your organization?

**Context:** The CRO needs to be an evangelist for testing, and will be more successful with team and company support. Ask for concrete examples or ideas that show a desire to be successful in sharing the optimization process with others.

### Question: Explain to me how the Internet works.

**Context:** Ask the candidate to describe a complex subject to the best of his/her ability. The answer to this question should demonstrate that the candidate can express complex ideas in clear, simple language that is easy to understand.
[Advanced] Handling the HiPPO

Many companies, even in an increasingly data-driven marketplace, still unfortunately succumb from time to time to what we call the “HiPPO Syndrome” (Highest Paid Person’s Opinion): allowing decisions to be made according to the most experienced executive rather than the data.

You may find yourself encountering various forms of passive and/or active resistance to adopting a testing-driven methodology. Here are a few ways to start curing the HiPPO Syndrome at your own workplace, and to move your organization toward an openness and eagerness for experimentation and a willingness to take even the most surprising numbers seriously.

Here are four things we would say to anyone in a position of decision-making authority who might be fearful of giving up his or her HiPPO status in the face of a more data-driven culture:

01. Ultimately, data-driven companies win because they’ve made listening to and understanding their customers a basic component in their decision-making process.

02. You have a competitor somewhere doing the same thing you do—but in a more data-driven way. And they will beat you, because they’re listening to the numbers.

03. Eliminating the need for a HiPPO can be liberating for an organization because people can feel comfortable saying “I don’t know, but let’s run an experiment.”

04. Another benefit of a more data-driven culture: fewer and shorter meetings.

Former Senior Product Marketing Manager Jarred Colli at Rocket Lawyer:

"Where previously, people would argue over what kind of headlines you use or what kind of picture, and you would spend hours drilling down on some stupid detail, now we don’t have those conversations anymore, since we’ll test all that stuff. We’ll figure out whatever is best."
During my first year working at Google, I learned an important lesson about experimentation when my mentor explained how I could convince my boss’s boss to let me try something. Even at a fairly data-driven company like Google it was hard to convince the higher-ups to do something potentially risky or radical. The key phrase in receiving this higher-up’s blessing, my mentor explained, was to say, ‘Let’s just run an experiment.’ In that context, the idea became an irresistible investigation into whether it would be worth their time and money—not a hard-and-fast decision of whether to make a permanent change.

Dan Siroker, CEO of Optimizely and former Product Manager at Google
What is the process for optimization?

A tool has been chosen, your team is in place. Now, testing will flow naturally and the conversion rates will lift, with all graphs measuring metrics tracking up and to the right. Right?

Wrong. It's essential to adopt procedural best practices for setting up and running an optimization organization first. You should develop processes for setting expectations, documentation, and creating excitement.

We'll also cover pitfalls and what to avoid when setting up your testing program.
Getting Started: How to Set Expectations
You’ve selected a testing platform, identified key stakeholders, and perhaps even secured an executive sponsor. Now, you’ve arrived at the ideal stage to put processes in place that will set your optimization program up for long-term success.

Define goals and build an optimization roadmap
Outline your optimization program, including key milestones and success metrics. Start a queue of test ideas, and add them to the roadmap in sequence. Make the plan publicly available to your team and company at large, if possible. By emphasizing transparency, you open up the program to input, questions, and involvement from others. The program may only have one or two active testers, but questions about tests could arise from any part of the organization, especially once visible changes are made.

Prioritizing a laundry list of test ideas is an important competency of a CRO (see "How to Hire for Optimization") and will be covered in more depth in the "Planning" section.

Clear the air about the data
In planning key success metrics for testing, make sure to take into account that the language of CRO may not perfectly match the objectives of the rest of the company. This is the responsibility of the CRO lead, to make sure that the data from the testing platform is fully integrated with discussions throughout the rest of the company.

Ensure that any potential integrations with analytics platforms, customer databases, or other workflows are taken care of from the start of the optimization program, if possible.

For objections about data quality and how to respond, see "Common Objections to Testing and How to Respond" in the "People" section.

Give optimization the time of day
In our experience, we find that even a very cursory, routine check-in meeting or agenda item devoted to testing is essential to our customer’s success. Add a "stand-up" 10-15 minute meeting once a week with the CRO lead and key stakeholders to discuss test results, review the next experiment in the queue, and volunteer or brainstorm any new testing ideas.

Now, on to the documentation!
Documentation for Every Stage of Optimization

This procedural step of testing may seem excessive, but we can’t emphasize enough the need for a consistent, well-kept process for documenting test ideas, as well as active and archived tests.

This is important for a few reasons, most of which relate to avoiding difficulties with change. If, for instance, your CRO expert were to leave the company, documentation is essential to preserving the institutional knowledge of testing they’ve gained during their tenure. The same is true of a testing platform: keep test documentation in a location outside of the testing platform (or regularly export and archive test results from your platform) to ensure that the experiment history is preserved in the event that the platform changes for any reason.

The key stages to document are each a part of the cycle of optimization:

01: Brainstorming and Prioritizing

02: Experiment Queue and Log of Active Experiments

03: Run Experiment

04: Results and Key Takeaways
Brainstorming and Prioritizing

First, come up with a few experiment ideas. Create a hypothesis for each test. All test ideas have merit—but experiment ideas with a strong rationale hold up better over time than randomly chosen ones. An experiment will either confirm or disconfirm the hypothesis, and provide a basis for iterating and expanding in future tests.

Once you have a list of potential tests for your website brainstormed, it’s time to prioritize the tests into a queue. Here are a number of questions to ask of each test idea when ranking them in a queue:

- [+1] Is it a good test with a solid hypothesis?
- [+1] Is the hypothesis based on a previous test? For instance, if Y was true because of this prior test, then X will be true in this future test.
- [-1] Does it require UI / Design / Engineering resources?
- [+1] Does the page for the test receive enough traffic to garner a results in a reasonable timeframe?
- [+1] Is the traffic to the webpage qualified? General traffic to a homepage can arrive from a variety of sources with varying levels of interest/intent. Choosing a landing page
- [+1] How does this test align to business objectives?
- [-1] Does this test require sign-off or approval across many teams?
- [+1] Does this experiment test something with clear ROI for the business?
- [+1] Does the webpage for this test have a high bounce rate?

For every “yes” answer, move the test idea up for a +1 answer and down for a -1 answer.
Once you have a queue of tests prioritized, it’s time to begin setting up the experiment.

**Document Experiments and Results**

Creating a log of active and archived tests will ensure that the organizational knowledge earned through optimization is not lost. As the amount of time spent optimizing and the number of experiments increases, maintaining a sense of what has been tested in the past will help to inform future experiments and prevent the team from repeating past exercises.

What I really like to focus on are good tests, tests that you know are almost like slam-dunks or very quick wins. **What that does is help you understand how the platform works and how to use it.** You can identify it as a win, pat yourself on the back, communicate that to the organization, thank everybody involved, and get everybody on board with a success.

Scott Zakrajsek, Global Web Analytics Manager for Adidas

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**Kyle Rush, Head of Optimization at Optimizely, recommends keeping a test log spreadsheet:** "I have a Google Spreadsheet with a row for every test I’ve ever run. It has these columns: date of test, hypothesis, screenshots, results, and comments."

Methods for documenting tests include:

- A spreadsheet log documenting each test
- A company Wiki or knowledge-base
- A company social network
Now, time to kick off the experiment ...

Once an experiment concludes, the results should be documented in the same experiment archive where the initial experiment setup was included.

Record Key Takeaways

Adding context to test results will enhance the documentation for both personal and team reference. Include key learnings, like whether the hypothesis was confirmed or disconfirmed and why that might be. If there were any conditions that negatively impacted the test, document those as well—for instance, a lull in traffic or a technical bug that skewed how results were recorded or interpreted.

“Stakeholder support and buy-in only happens if you do a good job of communicating and sharing things that you are learning. Making sure that we are communicating our wins, communicating the learning, and sharing those large-level trends with the rest of the organization actually becomes an important part of the culture, because that’s where we are able to showcase the value we bring to the organization.”

- Nazli Yuzak, Senior Digital Optimization Consultant at Dell

Although the documentation and procedural steps have been addressed, CRO will make a broader cultural impact when results are shared. We'll see a few ideas and best practices on how to share test results in the next two sections.
Create Excitement: Make Testing a Company-Wide Endeavor

It's one thing to get people excited about optimization; it's another thing entirely to encourage your company at large to make it an integral part of their daily practice. To be optimizing at full capacity, you need to make the testing culture at your organization contagious.

Part of this comes from communication and transparency. Promoting data aptitude amongst members of your team is also essential to making sure the practice sticks. There are, however, many ways to lighten up testing and make it a fun, interactive part of driving your businesses to greater success while uniting your team.

Reframe the data mindset

Familiarize yourself, your team, and your company with the practice of CRO by reading about the latest trends and new test ideas. Consuming information about optimization will help with brainstorming, developing best practices, and demonstrating to outlying team members how they, too, can benefit from testing a few ideas out.

Send colleagues to testing resources, like:

- The Optimizely Blog
- Conversion IXL
- Which Test Won?
- WiderFunnel

By surfacing test ideas and examples that other sites have found successful, you'll be able to prompt others on your team to think about how making small (or large) changes could have a positive impact on your website, gaining their buy-in and support.

Enable other Testers

Empowering and enabling the people in charge of running the tests is one of the most important components of building a testing culture. Also, depending on the platform you choose to use, you can have even the most non-technical members of your team joining the optimization ranks. The most successful customers Optimizely works with are the teams who allow people to test with creativity and resources.

What do we mean by this? Testing cannot work without creativity, that is, thinking outside of what exists on your site today and having the willingness to test it. Successful testing also requires certain resources: training, design/engineering work, educational tools, best practice information, and institutional encouragement. It's vital to create an environment where the people doing testing feel enabled and have the resources they need for the team to reach its full potential.

An Optimizely e-commerce customer publicizes a “Test of the Week” to the entire company by posting screenshots of test variations in a high-traffic area. The post includes the potential business impact as well as the change.

Online employment market leader CareerBuilder ran a competition when they first signed up for Optimizely. They created teams of two (a web designer and a marketer) and gave them all day to run an experiment and collect results. At the end of the day, the test with the largest impact won a prize.
### Brainstorm and Share Results Together

We’ve seen testing adopted and evangelized through a variety of successful tactics. The keys are to make discussion an open forum, challenge assumptions, and make it a bit competitive!

Submitting test ideas is an excellent way to collect a wide variety of perspectives, ideas, and to educate team members about testing. Here are a few methods we’ve seen:

<table>
<thead>
<tr>
<th><strong>Submitting test ideas</strong> is an excellent way to collect a wide variety of perspectives, ideas, and to educate team members about optimization.</th>
<th>Submit test ideas via Google Form, Google Moderator, or a bug-tracking system like Atlassian’s Jira.</th>
<th>Use an enterprise social network like Yammer, Facebook, or Socialcast to start discussion threads about testing ideas and challenges.</th>
<th>Host a brainstorming event or happy hour, where team members can come together and socialize while brainstorming.</th>
</tr>
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<tbody>
<tr>
<td><strong>General communication</strong> of testing progress and results helps to maintain momentum and keep experimentation top-of-mind.</td>
<td>Post a ‘Test of the Week’ in a high-traffic part of the office. Include variation screenshots, date started, and potential business impact.</td>
<td>Share tests at a company-wide meeting to recap high-level results and communicate the added value from recent experiments.</td>
<td>Use results-sharing decks to communicate outcomes of experiments to executives and key stakeholders. The original hypothesis should always be included for context.</td>
</tr>
<tr>
<td><strong>Gamification</strong> of testing if a popular way to spread testing internally and increase buy-in from a team.</td>
<td>Vote on winning variations, and keep a leaderboard of top experiment guessers. Challenge other team members to dethrone the leader!*</td>
<td>The employee with the best overall record for guessing experiment outcomes wins a prize or title, like “CRO of the Month.”</td>
<td>Creating a hackathon for running tests in a short timeframe. Create awards for most complex, or greatest business value tests.</td>
</tr>
<tr>
<td><strong>The pitfalls</strong> of not adopting a best practices early will keep your program from reaching its full potential.</td>
<td>Siloed optimization practice in only one department or person at a company. This practice will signify that optimization knowledge is not being shared effectively internally.</td>
<td>Alienating team members or employees in other departments. If the testing evangelist isn’t transparent about the testing process, they risk the program becoming bottlenecked from a lack of support internally.</td>
<td>Not making the CRO’s efforts a priority, or not having a testing evangelist at all could handicap the program from ever getting started, and let the benefits of an optimization program go unrealized.</td>
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*We use this method at Optimizely.*
By actively sharing and discussing the progress of your testing program, you'll be creating an open-minded and data-driven culture. You'll also be able to share the responsibility of testing and make the most out of the opportunity to test your web traffic at all times. Finally, you'll create an engaged following of CROs internally to ensure that optimization remains a priority at the company into the future.

At IGN, a website focused on video game, film, and other media reviews, testing evangelist Lizzie Allen took on the challenge of introducing the company to optimization, and helping to establish a culture where decisions would be rooted in data. She also took her program to the next level by creating a tournament to engage team members across the organization:

01. In month one, she introduced the company to testing through training sessions. She worked with the editorial team to educate employees throughout IGN about the practice. These sessions specifically centered on the value of testing two different headlines to see which one garnered more clicks.

02. When the early buzz and excitement started to dwindle, Allen perceived that people saw A/B testing as an extra step in an already established, already functioning process. “There wasn’t a foundation of data-minded people to support it, and I needed to cultivate that,” she says.

03. Allen gamified A/B testing by turning the site’s tests into a competition. The ‘A/B Master Cup’ was born. Allen would once a week send out a test that IGN had run that week and ask people to choose which variation they thought had won. She used the company’s internal chat tool to send out screenshots of the different variations. At the end of each month, she would crown the person who picked the most test winners correctly as the ‘A/B Master.’

Remember, there are many different ways to build a data-driven optimization program that fits well with your existing organization, and these suggestions can be used in many combinations or variations as you chart your own path to success.
Next Steps

Now it’s your turn to get started. Evaluate your current data mindset as an organization. Think of a few initial test ideas. Identify your ideal CRO candidates, internally or externally. If you don’t have executive support for your program yet, begin the exercise of making a business case to win their support.

Developing a robust optimization program has the power to improve your business in quantifiable terms, and to unite your team behind a common goal that everyone can be excited about. You have the opportunity to develop not just one, but many testing evangelists across your organization. Once you start, you’ll wonder how you ever made decisions without testing them first.

Optimizely helps companies large and small to be successful with optimization. We are focused on empowering our customers so that anyone, in any organization, can begin to test their online presence without technical resources, and can begin to make data-driven decisions about their business.

Since launching, Optimizely has run more than 300,000 experiments and simplified website optimization for more than 6,000 companies ranging from major consumer brands, small businesses, software companies, and media brands.

Get started using Optimizely on your website today with just a URL. Click here to test it out.