Enterprise organizations are consistently seeking the greatest return on investment (ROI) from each touch point in their customers’ journeys.

The rapid maturation of digital optimization – content and experience testing or behavioral targeting – offers some of the most reliable and consistent gains. While headlines often tout simple tests with tremendous results – changing the checkout button from yellow to green generated 300 percent more conversions, for example – any professional optimization program can and should be expected to deliver additive gains through an iterative process.

Forrester’s recent survey of customer experience decision makers revealed that 21 percent have prioritized investment in testing and optimization programs. However, like most enterprise initiatives, an optimization program hinges on the sum of three things: people, process and technology. And, according to MarketingSherpa, nearly 75 percent of businesses are unable to find suitable expertise for optimizing even simple landing pages. Similarly, Forrester recognizes in its survey that “user experience and data professionals are hardest to staff for.”

Through many years of developing, managing and supporting enterprise optimization organizations, Webtrends has identified the following best practices to build a complete optimization team to support your new or existing program and ensure the greatest potential for success.
Three Ways to Build Your Team

1. Hire
   - Hire new, dedicated and expert resources to manage and execute your optimization program.
   - Cost: High
   - Level of Expertise: Medium-High
   - Ramp-Up Time: 6 – 10 months
   - What to Look For: Candidates with extensive experience in optimization, statistics, project management, JavaScript, HTML, CSS, etc.

2. Train and supplement
   - Leverage outside expertise to train and develop your internal optimization team. Outsource the most critical optimization activities.
   - Cost: Low-Medium
   - Level of Expertise: Low-Medium
   - Ramp-Up Time: 3 – 6 months
   - What to Look For: Look for highly adaptable and inquisitive internal resources. Identify optimization experts to provide training and to fill the more specialized roles like the Optimization Strategist.

3. Outsource
   - Rely on an outside organization to manage and execute your optimization program.
   - Cost: Medium
   - Level of Expertise: High
   - Ramp-Up Time: ½ – 1 months
   - What to Look For: A managed service may be available from your optimization technology provider. Your creative agency may also have the necessary expertise and resources.
Hiring for a Complete Enterprise Optimization Team

A complete, enterprise optimization team requires that you bring dedicated resources to bear from the very beginning. With each person focused on his or her piece of the optimization puzzle, you can be confident that the right skills are being applied to the right task, which will prevent program failure due to lack of available or appropriately skilled resources. While you may not hire new resources for every role, this approach allows you to at least find experts in optimization for the most specialized positions. Keep in mind that as you build your program and begin to serve multiple organizational departments, you may need more than one person to support some of the following roles. Whichever strategy you choose to employ when building your team, it is important to ensure that the following roles are accounted for.

Optimization Project Lead

This person is the cornerstone of your entire program. This role requires experience with optimization programs and a firm grasp of the goals and priorities of your organization. Project leads are ultimately responsible for translating the organization’s business goals into test ideas. The lead is also focused on the roadmap for testing and targeting – how one test leads into another and what strategies are driving the roadmap for further tests and targets. The project lead must also be able to advocate for the methods and results from their optimization programs to ensure ongoing executive support and collaboration with other departments. Finally, be sure not to confuse the internal program sponsor, who may be part of Marketing, IT or customer experience departments, for the project lead. While a project lead may be suited to be the program sponsor, the opposite is not always true due to the need for more specialized skills.
Enterprise-scale optimization requires dedication to a rigorous testing methodology in order to see repeated and cumulative ROI. This means that a project manager is your best bet to ensure that multiple tests and targets are scheduled according to resource availability and to avoid test collisions where the same element is modified in multiple tests simultaneously. The project manager can also coordinate workflows for team members in order to keep each test on track. Between the project manager and project lead, these roles will be the key touch points for stakeholders around the organization to take advantage of the optimization program and enable their use of testing and targeting in their business units.

The optimization specialist should be the team’s subject matter expert in optimization. This role requires significant depth of knowledge and expertise in test and target design, segmentation and statistics in order to understand not only which test won, but why. The optimization specialist needs to be able to understand the business goals, interpret past tests and understand the customer journey in order to develop further test and target hypotheses and design an appropriate testing method to match the hypothesis. Furthermore, this individual must be well versed in all the available data sources and a strong grasp of both demographic and behavioral segmentation. Another critical responsibility for this role includes building and refining the testing program. This means defining the end-to-end program that will be used to provide structure to the way tests are hypothesized, built, tested, analyzed and documented.

Creative specialists are a key role because they will ensure that all the changes and targeted experiences made throughout the optimization program do not diminish the overall visual experience or usability of your digital properties and apps. Creatives handle test strategy when the test revolves around a new design element or the key elements of a digital property. This could be anything from testing a new website that includes responsive design to providing a targeted set of content for campaign respondents. Other responsibilities may include developing copy and mockups for approval from stakeholders before they are sent to development. Therefore, this person should be intimately familiar with your brand and design language and be able to create compelling copy and content.

You may be tempted to borrow a developer part time from your website or app teams – resist the impulse! If possible, find dedicated resources to ensure that you don’t end up with a bottleneck in test and experience development. The developer will interpret the test plan and the creative specialist’s mockups to build the desired experiences using a combination of skills including HTML, CSS, JavaScript, mobile SDKs and more. Finally, don’t forget about QA. While you likely have QA resources that could be shared, be mindful that they don’t become a bottleneck in the optimization program as defined by the optimization designer and lead.

Get Your Team on the Same Page
“Online testing is complex and involves many participants and skills,” according to Forrester Research, “and for most firms, process remains the missing ingredient.”

Ensure that your program includes the following key stages:
1. Hypothesis and plan development
2. Test design
3. Variation/Experience development
4. QA
5. Test activation
6. Results analysis
7. Implementation of winning experience
8. Documentation of results
Analyst

Once again, the temptation to borrow resources for this role is inevitable but the skills required for an optimization analyst are sometimes distinct from those of a business analyst. Look for those with statistical expertise and a keen understanding of the mathematical sciences that drive A/B/n, full factorial and fractional factorial multivariate testing, and the key principals of confidence, significance and correlation. Critically, analysts should be able to tell you not only which test performed better, but why, and what elements of other variations are worth testing further.

Train and Supplement Your Team

It is likely that you have some of the necessary roles or skills represented in your current organization, but their time is assuredly allocated elsewhere. Enterprise organizations pursuing an optimization program require dedicated resources to ensure that your optimization program stays on track and continues to grow in value.

When you begin building your team, first look internally for available resources with the appropriate skillsets. If your organization is new to optimization or owning the end-to-end program, be prepared to look outside your organization for new hires or training to satisfy roles that require extensive expertise. Alternatively, you may choose to augment your team with expert, outside resources provided by a creative agency or optimization solution provider. In this case, you may benefit from part-time, immediate access to more highly-skilled and experienced professionals than you are able to hire or train.

Don’t forget that there are variations of the roles and distribution of responsibilities as described above and it is important to make sure that the size and structure of your optimization team matches your optimization goals. For example, you may need a copywriter in addition to your creative specialist due to the volume of work in these two areas or if your current resource is not sufficiently experienced to satisfy both sets of responsibilities. Similarly, if you are looking to increase the cadence of tests and targets temporarily or immediately, you may consider augmenting your team with outside experts or resources temporarily to help you scale your program up and down as needed.

When looking for an optimization expert to offer training or to contribute directly as an outside team member, look specifically for a wide range of optimization experience. What types of testing and targeting have they done previously and at what scale? Do they have appropriate experience with multivariate testing and the statistics involved in deciphering test results? Has the person done similar tests with a comparable enterprise organization and if so, what were the results? A useful exercise to assess optimization expertise is to ask for suggestions for optimization strategies on your website or other digital property as well as the test design they would recommend and why.
Outsource for Experience and Speed

Outsourcing your optimization team completely or bringing in experts to augment your team’s existing skill-sets means finding optimization experts. The most common place to find experts will be at your creative agency and your optimization solution provider. These two resources have the added benefit of an existing relationship with your organization which frequently means that your optimization program can begin much sooner.

Creative agencies often have experience with a number of optimization tools and are particularly adept at creative experience and content design. However, expertise in optimization strategies, process development, and results analysis are not a given. If you look to your creative agency to provide your optimization team in part or in whole, pay special attention to these three areas which can be key drivers of an optimization program’s sophistication and ultimate success.

On the flip side, your optimization solution provider will have extensive experience with the use of their optimization tools and, in some cases, offer services to take the place of some or all of the roles described above. If you look to your solution provider, be sure to get a complete breakdown of responsibilities and roles that their organization can support to ensure complete coverage. Some optimization vendors offer few services and/or lack sufficient strategic expertise for your enterprise program while others choose to make it an integral component of their solution – even offering a fully managed service in certain cases. Supporting services may include just creative professionals or a complete team of experts in optimization strategy, test design, program development, project management and analysis.

If you choose to utilize the skills of your agency or solution provider, experience in optimization strategy, optimization program management and execution are the most important evaluation criteria. The underlying skills in statistics, project management, creative or web development may be similar to other applications but extensive experience in their use in optimization and a variety of use cases will lead to faster, more meaningful and better performing testing and targeting. Designing tests and hypothesis can blur the line between art and statistical science so learnings from past experiences in testing and how one test methodology may be more appropriate than another based on the test goals can have a huge impact on the degree of lift that is realized. For these reasons, you wouldn’t compromise when hiring talent with relevant experience so don’t compromise when vetting your outsourced team. Be sure to ask for client references to develop an understanding of the provider’s service coverage and quality.
Webtrends Can Help

Just like the process of building your team, look for tools that are built and supported by experts with a proven track record and can not only support your use of technology but provide guidance and expertise to ensure your program’s success. Webtrends delivers an industry-leading combination of optimization tools for A/B/n and multivariate testing and behavioral targeting. These products are complemented by a comprehensive team of experts with a proven record of success who deliver everything from training and program development to completely managed services for immediate scale. In more detail, the team of experts can handle everything from optimization strategy, program management, test and creative design, test development, and deep statistical analysis for the most basic or the most complex, cross-channel tests and targeted experiences.

Get in touch and we’ll work to understand your needs, goals and to help you develop and execute on an optimization program that will deliver cumulative ROI from one test to the next.

Learn how to build awesome user experiences with optimization:
webtrends.com/optimization

About Webtrends Inc.

For more than 20 years, Webtrends has helped companies make sense of their customer data to drive digital marketing success. By combining innovative technology with our team of trusted and creative advisors, our solutions are designed to provide actionable insights, increase customer engagement and boost revenue.

We partner with companies at all levels of digital maturity and offer solutions in measurement and optimization. We work closely with approximately 2,000 global brands including Microsoft, KLM Royal Dutch Airlines, Kimberly-Clark, HSBC, Marks & Spencer, npower, BMW, Toyota, The Telegraph, Lastminute.com and many more.

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