Choose the Right Customer Experience (CX) Consultant

Five Essential Questions to Ask Up Front

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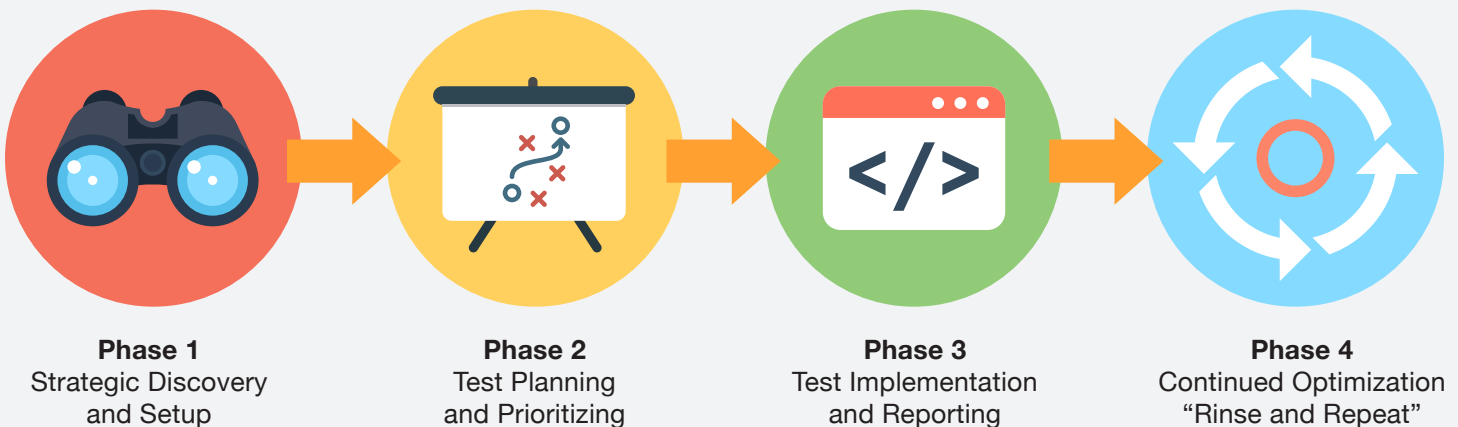Blast Analytics & Marketing

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Are you ready to Make your Mark and EVOLVE your organization by optimizing your website, but don't know where to start?

Are you lacking the resources and expertise to launch an optimization program? Don't fear — you're not alone. Many organizations recognize the benefits of testing and optimization, but struggle with the execution.

That's where working with a strong optimization partner can help. But before you jump in, read on to find out the five essential questions (and answers) your organization should be asking to determine if the partner is the right fit for your business and optimization goals.

Phase 1
Strategic Discovery and Setup

Phase 2
Test Planning and Prioritizing

Phase 3
Test Implementation and Reporting

Phase 4
Continued Optimization "Rinse and Repeat"

Test Methodology Questions

Question 1: What's the basis for your test strategy?

A — "We're the experts, and we'll leverage our experience to create recommendations."

B — "To be efficient our team utilizes best practices and standards as the basis for our test recommendations."

C — "Our optimization team is data-driven, with a focus on your business and your customers. First, we learn about your business goals and challenges, and then do a deep dive into your data to create your testing strategy." **(WINNER)**

Strong test recommendations are grounded in data. If the optimization team's response to this question is either A or B, we strongly recommend considering another option. Neither of those approaches utilize meaningful data, and as a result, you're likely to invest more than what you'll get in return.

If the potential optimization partner says they are data-driven, that's a positive first step! However, it seems these days marketing agencies who tend to generalize, not specialize in experimentation and data analysis, like to toss around the phrase "data-driven" simply to win over potential clients. It's absolutely necessary to dig further and understand exactly what they mean by being data-driven. The next essential question helps you do that.

Also, keep in mind that response B tends to arise when clients decide to take optimization efforts in-house. Often times optimization responsibilities get assigned to an existing marketing or content team, instead of building out a dedicated optimization team. Placing the additional responsibilities of testing on a team that is already managing multiple tasks can lead to two major consequences.

First, these internal teams are likely to treat testing as a secondary interest and therefore, testing efforts are more prone to being set aside in lieu of their primary responsibilities (e.g. marketing efforts). Over time this can result in a decreased and inconsistent testing frequency. Second, because these teams have to manage their time across multiple projects, even if there is an interest to be data-driven, the reality is that they have limited resources, mainly their time, and this may prevent them from being able to take on this type of analysis. As a result, to meet their testing objectives in a timely manner, these teams are more likely to reference best practices or standards for their test recommendations. While initially it may be appealing to conserve costs and utilize existing resources to take on optimization efforts, ultimately many clients realize that it is a better investment to work with a team of optimization experts, who can invest the time necessary for a data-driven approach.

Question 2: What specific data does your team use to create test recommendations?

A — "We use industry benchmarks to create a checklist of recommendations for what to test, helping us launch our first test quickly."

B — "We use quantitative data from your website to determine where there are potential customer experience issues occurring."

C — "We consider all data relevant to your site and your business's KPIs, including quantitative data (e.g. analytics and marketing platforms data) and qualitative data (e.g. heat maps, click maps, feedback polls, user testing, etc). This allows our team to identify which pages to assess, as well as which specific elements on those pages are creating friction for your users." **(WINNER)**

Industry Data

What this question will reveal is whether "data-driven" means looking at your data, or simply looking at general industry data. If it's only industry data, they will typically use a pre-existing checklist of recommendations to test on your site. **While it's useful to have benchmark data for your specific industry, this data isn't tailored to your website, leaving many stones unturned.**

Using a pre-existing checklist means your team can likely hit the ground running faster — and get that first test launched quicker. However, what's missing with this approach is understanding whether these test recommendations even make sense based on how your website is designed, and most importantly, how your site visitors behave.
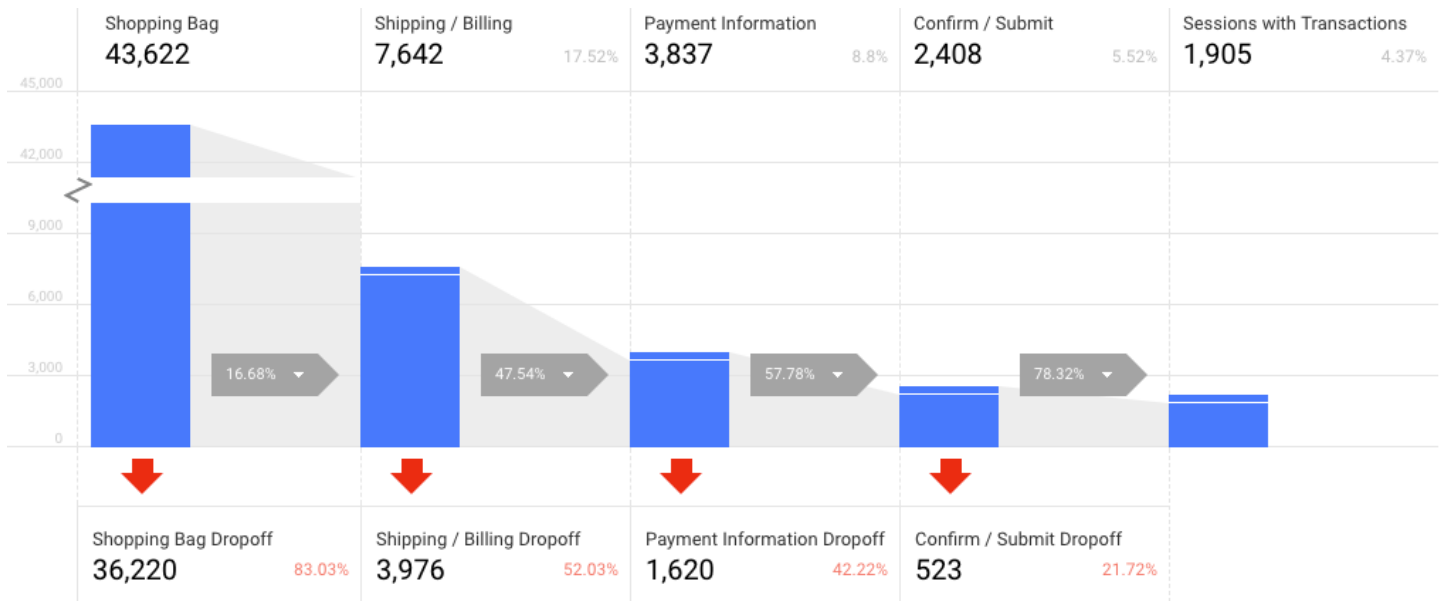
With this approach, you may achieve a test win here or there, but you're likely to have more success when test recommendations are tailored to the unique nuances of your website pathways and performance. **Essentially, you assume the risk of running a test for the sake of running a test, instead of trying to solve an actual customer experience (CX) issue that impacts your bottom-line.**

Your Website Data

There are different ways to look at data for your website. One important way is to leverage your analytics platform and analyze site performance. Looking at quantitative data is extremely useful in identifying drop offs in performance, whether during checkout, the form completion process, or higher up the funnel.

It's also important in analyzing landing page performance and identifying issues based on browser and device. **In general, quantitative data answers the question of "Where are potential UX issues occurring?"**

| Shopping Bag 43,622 | Shipping / Billing 7,642 17.52% | Payment Information 3,837 8.8% | Confirm / Submit 2,408 5.52% | Sessions with Transactions 1,905 4.37% |

16.68% ▼ 47.54% ▼ 57.78% ▼ 78.32% ▼

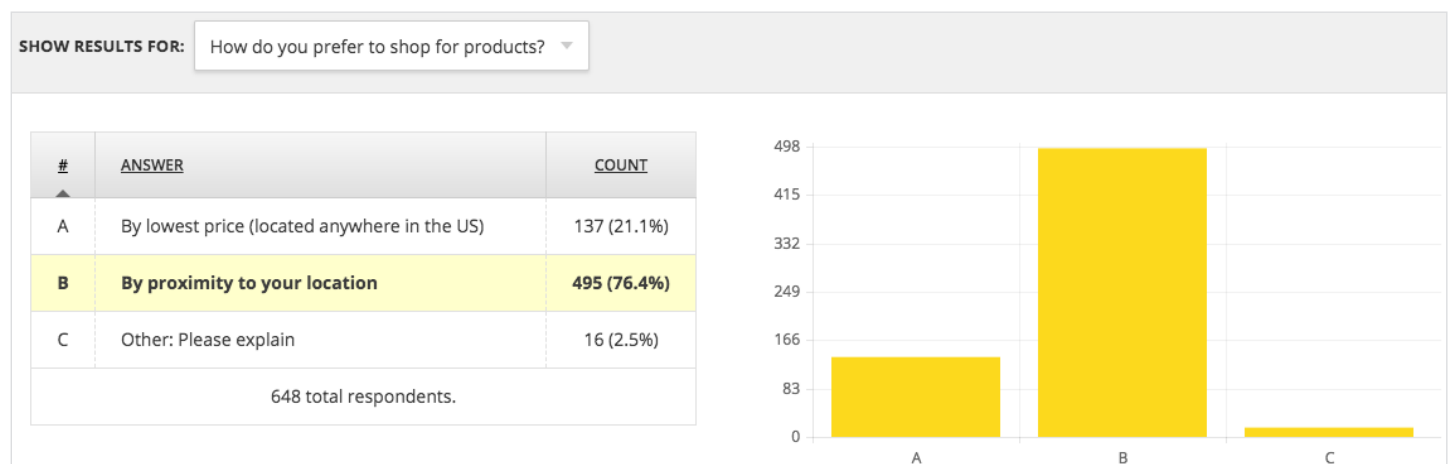| Shopping Bag Dropoff 36,220 83.03% | Shipping / Billing Dropoff 3,976 52.03% | Payment Information Dropoff 1,620 42.22% | Confirm / Submit Dropoff 523 21.72% |

If the optimization partner uses quantitative data, this is another positive step forward. Still, quantitative data alone will not get you to the best test recommendations. While quantitative data may highlight which pages to look at, it will not show you exactly what's wrong with the pages. Therefore, the optimization partner is left guessing which elements on the page are the main source of friction for your visitors. In fact, some optimization partners will suggest testing all elements on the page to try and impact performance, instead of taking the time to consider additional data to narrow in on specific elements to test.

To have a truly data-driven approach to optimization, quantitative data and qualitative data need to be considered. There are many tactics and tools that can be used to obtain this information, including:

- User testing
- Usability testing
- Heat maps, scroll maps, click maps
- Feedback polls

- Customer surveys
- Net promoter score
- Live chat and phone transcripts

These tools provide site-specific data, whether it comes from your targeted demographics (e.g. user testing) or your own customers (e.g. feedback polls). Leveraging such tools will allow the partner to narrow down the likely sources of friction on the targeted page, leading to stronger test recommendations.

SHOW RESULTS FOR: How do you prefer to shop for products?

#	ANSWER	COUNT
A	By lowest price (located anywhere in the US)	137 (21.1%)
B	By proximity to your location	495 (76.4%)
C	Other: Please explain	16 (2.5%)
	648 total respondents.	

If the optimization partner incorporates quantitative and qualitative data into its findings, the next step is to understand what level of analysis is taking place.

Question 3: How much time does your team invest in the discovery process?

A "We don't spend much on discovery because we have an existing checklist of recommendations for your industry. We spend about a week looking at industry data and pulling the most applicable test recommendations from our checklist."

B "We spend two weeks reviewing your website and analytics data to compile the best test recommendations."

C "We place a strong emphasis on our discovery process. The level of effort we invest in collecting and analyzing data is critical to ensuring the rigor of the data points that serve as a basis for our test recommendations. As a result, our discovery process typically takes around four weeks to allow enough time to gather a sizable amount of data to evaluate. At the end of the discovery process, we'll present our findings along with test recommendations, prioritized to meet your business needs." **(WINNER)**

The one thing to understand is that a proper analysis of quantitative and qualitative data requires an upfront investment of time, usually referred to as the discovery process. If the discovery process is short (e.g. one week), chances are the findings that come out of that analysis will not be as thorough and meaningful. Furthermore, you're likely to receive a smaller number of test recommendations.

A solid discovery process is usually around four weeks, which gives enough time to gather reliable information.

For example, would you prefer your team act on a recommendation when its findings are based on just 25 customer responses, or more than 100 customer responses? Having a sufficient volume of traffic for heat/click maps, and responses from polls and surveys, is critical. This provides the optimization partner with enough data to identify trends on what may be the source of friction, instead of relying on one visitor's negative experience with the site. This can occur if you have too few responses. **If data-driven test recommendations are a top priority for your business, then it's important to have this realistic expectation of how quickly you'll be able to launch that first test.**

Discovery Process	Week 1	Week 2	Week 3	Week 4	Week 5
Initial Kickoff Meeting with Client	▓				
Access necessary platforms & implement code for testing platform & qualitative tools	▓				
Heuristic Analysis	▓	▓			
Quantitive Data Review	▓	▓			
Qualitative Tool Set Up & Launch		▓			
Qualitative Data Collection		▓	▓	▓	
User Testing and Usability Testing		▓	▓	▓	
Analysis, Test Recommendation & Testing Roadmap Creation			▓	▓	▓
Discovery Findings Meeting with Client					▓
Build Out First Test Recommendation					▓

Keep in mind that, by beginning with a meaningful discovery process, the optimization partner should have a number of customized test recommendations in hand that, ideally, will be prioritized or incorporated into a testing roadmap. Once you get the first test running, you'll have the ability to launch future tests in a timely manner.

ℹ️

*Tip** Ongoing optimization is essential to a successful testing process. Therefore, the data-driven approach should not stop after initial discovery. While executing tests, the optimization team should perform on-going analysis and incorporate testing insights into modifying existing test recommendations and creating new test ideas

Testing Planning and Quality Assurance (QA) Questions

☑ **Question 4: How often does your team make modifications to a test after it's launched?**

A "It happens quite often. Our goal is to take action and launch tests as quickly as possible for your team. Due to the quick turnaround, we may not detect and resolve all issues prior to launch. However, we are capable of making these changes once the test is live. There's no need to slow down testing, as we can make our changes without having to pause the test. Furthermore, we don't need to prioritize goals beforehand. We'll track a number of metrics in the test, and then our team will analyze the results to identify if and where performance is impacted.

B "We ensure our variations are tested on the most popular browsers, such as Chrome. We assume that reviewing those browsers should account for most of your site visitors. In addition, our team can handle making last-minute changes when necessary and are able to launch the test in a timely manner. We're confident that our initial QA of the test is adequate enough that we can launch the test soon after without having to slow things down with a second review. When we do need to make a change after a test has started, our process is to pause the test, quickly make the change, and then unpause when we're ready to continue."

C "We have a thorough test planning and QA process in place to reduce the need to make changes to a test after it's launched. During this process, we collaborate with the client and ensure we all agree on the targeted page, audience, KPIs, test duration, and visual mockup of the test recommendation. After finishing the test plan, the test buildout undergoes extensive QA, including testing the experience on different browsers (not just popular ones) and devices. Further, if there are last minute changes before a test launches, we review the test plan again to ensure audiences, KPIs, and mockups are updated. The updated variant undergoes additional QA before it can be launched.

It's highly unusual for our team to update a test after it's launched. However, if this does occur, our process is to pause the current test, create a copy of it with updated changes, and launch the new test. This will allow us to preserve the data from the initial test and reduce the chance of contamination."
(WINNER)

Test ideation is an important aspect to optimization, but its potential to impact your organization's KPIs is dependent on the execution of the test. If a test isn't built out properly or key metrics are not tracked, it would be difficult for them to determine how the test recommendation actually performs.

While there's no magic number to this question, generally speaking, they shouldn't have to make changes to a test after it has started. There are times where changes may need to be made, but that's the exception and not the rule. In the rare case where a change needs to be made, the best practice is to pause the current test, create a copy of the test with updated changes, and launch the new test.

> *...your business runs the risk of implementing a change that may actually negatively impact the bottom line.*

Below are just a few examples of what partners may try to modify after a test launches, which typically occurs when a strong QA process isn't in place:

- Design changes to the variation
- Pausing or adding a variation
- Modifying the targeted audience or url
- Changing traffic distribution between the original and variations
- Adding a new goal

The problem with making these changes is that testing platforms, such as Optimizely, collect conversion data (e.g. revenue, transactions, form completions) for the entire time the test is running and will use that data to determine how the variation performed against the control. **Making a change part way through the experiment contaminates the data.** If this happens, when looking at the end results, they will be unable to pinpoint whether the lift or decrease in performance was due to the change made to the test or how that original treatment actually performed.

An optimization team that has a thorough test planning and QA process shouldn't need to make such changes after a test is launched.

Example
Assume you run a test with the control and one test variation. Initially, it looks like the test variation is performing well (e.g. trending towards a 5% increase in conversion rate). The testing partner decides to make an additional change to the test variation, thinking that this will improve the conversion rate even more.

At the end of the test, the variation had an overall positive impact of +1% increase on your KPI.

Although overall there was a positive impact on conversion rate, you will not be able to determine if the dip in performance from 5% to 1% was due to the additional changes they made, or if the original test variation was actually performing worse than initially indicated. If they recommend implementing the change because there was an overall lift in performance, **your business runs the risk of implementing a change that may actually negatively impact the bottom line.**

A solid test planning process should include the following:

- A hypothesis stating the UX problem, what the test is looking to change, and the expected end result
- Solid visual of the test variation(s), highlighting all the changes that will be made
- Estimated test duration to ensure test results have enough traffic and conversion volume
- Agreed upon targeted URL(s) and audience
- All necessary goals to be tracked
- In-depth QA of test variations and goal tracking

If they regularly update active tests, chances are their test planning process is

1. Missing one of these key elements, or

2. Includes these elements on paper, but they don't adhere to it in practice.

Partners claiming to have a thorough testing process but are regularly changing active tests are likely cutting corners in the process, oftentimes to ensure tests are launched quickly. Again, the problem with this is that if they do not adhere to the process, launches a test quickly, then modifies the test after launch, the test results are contaminated, thus compromising your ability to gain key insights from the test.

Understanding how often they make changes to active tests will provide better insight into whether or not they have a solid process, and show how strictly they adhere to it. **This will be a strong indicator on whether or not you'd be able to rely on such test results to make important business decisions.**

Question 5: How does your team determine if a test result will actually have an impact on my business?

A "If we see performance is trending positively, we feel comfortable that this will have an impact on your business."

B "We're confident in the testing platform to determine statistical significance, so we don't worry about conversion volume or test duration."

C "In order to determine whether test results show an actual impact for your site, it's important to have rigor for test results. Specifically, test results need to reach a significance threshold, which is typically 95%. However, depending on your business needs, that threshold can be adjusted to **90% statistical significance (if you're willing to take on more risk) or 99% (if you want minimal risk with longer test duration).** In addition to reaching the significance threshold, we also need to have sufficient conversion volume for each variation, ideally 250 conversions per treatment. We will not analyze data with less than 100 conversions per variation because there isn't enough data to make a sound determination that your business can rely on." **(WINNER)**

Most answers to this question will involve the term "statistical significance." If an optimization partner doesn't mention this, we strongly recommend that you move on from them. It's rare for a test result to reach 100% statistical significance. Therefore, with testing there's always some level of risk that the results are a false positive (showing improvement when, in fact, it doesn't) or false negative (showing no change when there's an actual change).

A typical statistical significance threshold is between 90% and 99%. The higher the significance threshold, the smaller the risk is of having a false positive or false negative. However, these tests will require more visitors and likely need to run for much longer.

The lower the significance threshold, the quicker the tests can conclude, but your company will be taking on a bigger risk of there being a false positive or false negative. Many teams use 95% statistical significance as the threshold for their analysis. Your business will need to assess your priorities to determine what works best for your needs, whether it's quicker tests (assuming more risks) or low-risk tests (with longer test durations).

Are your results significant?

	Control	Variation
Number of Visitors	1000	1000
Number of Conversions	11	23

CALCULATE SIGNIFICANCE

| P-Value (Range from 0-1)	Significance
0.019	Yes!

However, determining the impact of test results doesn't hinge solely on statistical significance. To ensure the rigor of your test results, there needs to be adequate traffic and conversion volume, as well. If the optimization partner doesn't cover this point, we'd recommend asking specifically what conversion volume they wait for before assessing whether or not there's an impact on performance. It's entirely possible to reach the significance threshold with minimal conversion volume (e.g. 20 transactions), but the problem with relying on such results is that performance can easily be affected.

With low conversion volume, if the variation or control received even a couple more conversions, this can drastically change conversion rate, performance lift/decrease, and ultimately statistical significance. Therefore, it's extremely important that each test variation has sufficient conversion volume (e.g. ideally 250 conversions per variation or 100 conversions per variation at the bare minimum) before a proper test analysis can begin.

With the level of effort in place to create test ideas and properly execute on test implementation, it's just as important to ensure the test results and insights are based on reliable data and sound analysis. This question will help you navigate the statistical significance jargon and truly understand whether or not their team has a solid approach to analyzing test results that your business can rely on.
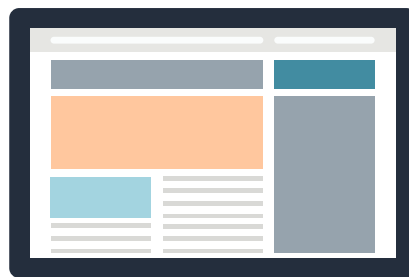
Control (A)   **Variation (B1)**   **Variation (B2)**

# 5 Questions and Takeaways to Keep in Mind

Here's a quick summary of the five questions to ask any external optimization partner along with optimal answers:

1 What's the basis for your test strategy?
Optimal Answer: "We start with learning about your business needs, then conduct a thorough analysis that's focused on data from your customers and your business."

2 What specific data does your team use to create test recommendations?
Optimal Answer: We consider all data for your site, including quantitative and qualitative data.

3 How much time does your team invest in the discovery process?
Optimal Answer: "The initial discovery process should take roughly four weeks to allow enough time to gather a sizable volume of data to serve as the basis for test recommendations. This should yield a number test recommendations, at least enough to conduct tests for the next 6-12 months. Outside initial discovery, while executing tests, the optimization team performs on-going analysis that will incorporate testing insights into modifying existing test recommendations and creating new test ideas."

4 How often does your team make modifications to a test after it's launched?
Optimal Answer: Rarely. We have a thorough test planning and QA process that reduces the need to do this.

5 How does your team determine if your test results will actually have an impact on my business?
Optimal Answer: Test results need to have sufficient conversion volume and reach the significance threshold in order to determine whether there's an actual impact.

Not All Tests Are Created Equal

Deciding to invest in experimentation for your website is a necessary step in order to impact KPIs that matter to your business. However, not all tests are created equal. The stronger the test recommendation you start with, the better your chances are of seeing a positive lift in performance. It's important that you work with an optimization partner that's best suited to your needs. Most businesses prefer a truly data-driven approach, one that's tailored to their site and visitors. The evidence will be seen in the level of effort their team invests in the discovery process.
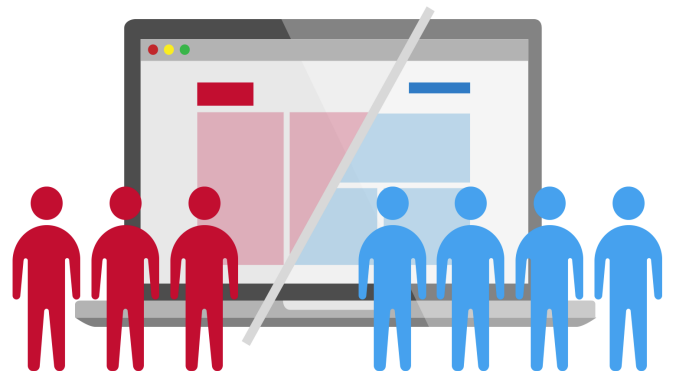
Process is Critical in Reducing Risk

Furthermore, after having solid test recommendations to work with, it's important to have a thorough test planning and QA process to ensure the test, and necessary goals, are properly built prior to launch. If they regularly update tests after launch this will increase the risk of contaminated results. Even if there are last-minute changes, a strong partner will realize the value of sticking with the process to make sure the changes don't create additional issues after launch.

Finally, it's important that the optimization partner has a solid understanding of statistical significance and how to properly analyze test results. Determining whether or not a test had an impact depends on several factors, including reaching the significance threshold and sufficient conversion volume. It's best to work with a testing and optimization partner that understands your business needs, including the level of risk your company is willing to assume with testing.

These five questions will help you gain a better understanding of what each **customer experience** optimization partner has to offer, so you can make the best decision to EVOLVE your organization.

More Customer Experience Resources

Tool: Blast Statistical Significance Calculator
Case Study: Using Optimizely to Increase Customer Awareness & Engagement
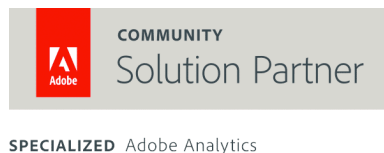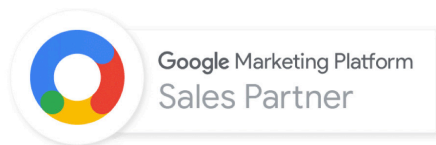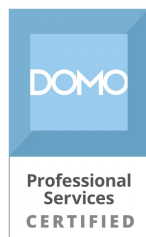**Journal Article:** How Page Speed Impacts the Bottom Line in the Applied Marketing Analytics
Blog Post: Are You Using the Right Ecommerce Testing KPI?

About the Author: Roopa Carpenter

Roopa Carpenter is Blast's Director, Optimization. She has over 10+ years of experience driving conversion rate optimization strategy, test implementation, and results analysis for lead generation and ecommerce clients. Her goal is to utilize data-driven testing to improve the customer experience for site visitors and app users while impacting bottom-line metrics for her clients.

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COMMUNITY
Adobe
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SPECIALIZED Adobe Analytics

Optimizely
CERTIFIED
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ANALYTICS
ASSOCIATION

Accredited
Professional | bing™ Ads

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