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Intro

Dumb but true. Despite all the complex statistics, technology, and strategic thinking required, for most marketers the toughest part about testing is ... getting permission from the powers that be.

Who could have guessed office politics would be turn out to be harder to handle than statistics would be? The following are my suggestions on how to beat the management into submission. Well, more like schmooze them into agreement.

Impress Your Boss (or the CEO): A Four Point Presentation

Getting permission (and budget) for testing often must begin with an internal education program. This can be incredibly frustrating to anyone with a testing background because the reasons to test are All So Obvious. But management is oblivious.

Key: Most people in management don't think their company Web site is really all that bad. And, even if they'll admit it could be a bit better, they don't see a direct line between any design flaws and the fact that prospects are leaving in droves and money's being left on the table. Management expects that even if the site is a bit imperfect, good prospects will dig to find what they want, and anyone who abandons too easily wasn't worth bothering with. Lastly, dealing with committee meetings, technology and approvals to get the site to where it is now was a massive headache... who wants to go there again?

Put together a high impact presentation that demonstrates the problem, without delving into too many acres of detailed stats (boring) or relying on your word as an "expert". (If they trusted you, you'd already be testing. Step back and present external expertise instead.)

Your presentation should be fairly brief – 20-30 minutes plus 10-15 for Q&A is a great length. You're forced to boil your points down to the highest impact, and nothing critical is diluted by too much information. Management wants a top-line summary that is backed, when asked for, by reams of detailed stats and footnotes that they can direct an underling to plow through later if need be. Pick a time period that's best for attention and energy – perhaps 10 or 11am.

Lastly, some CEOs will never ever take your word for anything, but they'll listen eagerly to an outside consultant. I know it doesn't make sense, but there it is. No one's ever appreciated in their own home town as much as they are elsewhere. If you have a CEO like this, you may need the external person to give the entire presentation. Of course, you'll feed them relevant data and vet slides beforehand.

The best consultant to pick is one with name brand recognition. Either they've worked with a successful direct competitor, or they've been quoted in the mainstream business press (WSJ.com is the prime position, anything in the testing niche matters far less), and/or they've written a book which has been published by a traditional publisher and is available in bookstores. (White papers, and anything online is often far less impressive to a CEO unless it's branded by a name-brand research firm such as Gartner or Forrester.)

Hopefully though, the consultant will not be someone who is seen as shilling for testing work themselves. They have to appear to be above the fray, dispensing wisdom without anything personal to gain on the outcome.

Step 1. Instill Fear

Your initial goal is a visceral reaction. You want management to gasp with the realization – based on facts and emotions – that Oh My God We Have A Problem! Content that works best includes but is not limited to pie charts, colorful graphics, video, screenshots with big “abandon rate” stickers pasted on top of them, etc. :

- Abandon rates from a few critical pages (cart, form fills, home page, PPC landing page)
- Video highlights clip (if possible) from a usability lab. Even a home-done one is fine.
- Colorful heatmap from an eyetracking study
- Quick survey results from a “Why are you abandoning our site?” survey served via DHTML to enough people to get statistically impressive if not wholly conclusive results (you need at minimum 100 survey fills) iPerceptions offers a free 4Q survey tool you can use.

Step 2. Fire Up Greed

Next, show them the money. It's best to under-promise and over-deliver, so you don't get caught in a backlash later on (never make promises you can't keep.) If your site is typical of corporate America, chances are you can improve conversions by at least low double digits at bare minimum. So, do your math and show estimated minimum money being left on the table. In fact, depending on the company, I'd consider starting this section of the presentation with an image of a pile of money on a table.

You can even show a particular page screenshot, with a \$\$\$ estimate of potential revenue lift imposed on it. If you are not in ecommerce, you'll need to do a little math to show that money. Perhaps it's a number of qualified leads that normally cost \$ in the marketing budget and could result in \$\$\$\$ ultimately in the sales pipeline. Cost savings are nearly as good as sales. If your company is doing PPC marketing such as Google AdWords, you can show a Google results screenshot with your current cost per landing page conversion marked on top in red, and then the estimated “post-testing” cost per conversion next to it, plus a % savings figure as well.

Back all these numbers with available benchmarks and any actual measurements currently available from your site's performance. Don't go into enormous detail in the presentation, but make it clear the data is available for deeper evaluation for anyone who's interested.

Also make it clear that your numbers are conservative estimates, not inflated for the purposes of the presentation. Sound humble, dryly factual and sincere. The numbers alone are enough to excite the audience, don't let an ounce of “hype” slip into your verbal tone.

Step 3. Stoke Peer Pressure

Very few CEOs are early adopters. Although, they want to be seen as leaders, most tend to run with the pack more than they'd ever admit. Within that framework, they're often highly competitive and aspirational. They want to beat their direct competitors and aspire to be like their business mentors and personal icons. Find out who those people or brands are, find out who's testing, and then present that fact.

This may be one slide – just listing who else is testing along with their logos (eye candy) and anything quick stat you may have gleaned from press about that brand's tests. Worse case scenario, show an industry-wide stat. If you can find a happy quote about testing from a brand exec, stick an excerpted version of the quote on there too.

Get these numbers and quotes from Case Studies and Benchmark Guides from publishers such as MarketingSherpa. In addition, many testing vendors post case studies on their sites that you can use for this purpose. Put your sources in abbreviated fashion in tiny-typeface at the bottom of the slide just for future reference.

Step 4. Cover Their Ass

CEOs do not like to take risks, especially in areas outside their direct area of expertise. You should end your presentation by showing them how safe their decision to start testing will be. The best way is to present an actual guarantee from a service company. (See my article on how to pick a vendor for more info on guarantees.) You should also propose a course of action that's not too overwhelming. You may know the entire site needs a massive re-haul... but it's safer to propose a small, manageable trial first.

Keep your trial proposal to one slide, perhaps even entitle it "Action Proposal: Low Risk Trial".

Do not use the word "Experiment" in any connection with your test, even though that's the terminology that your testing software and/or services firm may use. Experiments are scary, risky things by their nature. Tests seem are a bit safer, a bit more stodgy. You're testing the ice before stepping out on it, not experimenting with something new and unproven altogether.

Pick one area to test that is **not** the baby of anyone in power today. Best case, pick a page developed and/or approved by someone who has left the company. That way, it doesn't look like you're gunning for anyone personally.

Also, suggest ways the test can be limited in risk – for example, perhaps only 10% of incoming traffic to the page need ever see the test panel. (Run the numbers based on how many conversions your software tells you that you need to obtain conclusive results.)

Lastly, suggest a deadline and outline the resources you'll need for the trial. Don't keep these too minimal because if you start too small, it will be harder to ramp up budget and staff later on. "You did it in your spare time with no extra staff, why do you need more now?" will ring in your ears until the end of time otherwise. Pick a fine line between asking for too much versus not enough. Remember, just like consumers, many CEOs don't respect projects that are too cheap. If it's that cheap and easy, maybe it's not really worth anything at all.

Don't Give IT a Chance to Hate You

IT can crush your testing program like a bug if they feel like it. The chances they'll feel like it are fairly high too because:

- Anything related to Web technology is seen as their turf.
- They already have too much to do and too little time.
- They're very sure they are a lot smarter than you.
- They hate marketing, advertising and "suits".
- If there's room for more tech budget, they want to be in control of it.
- They may have developed the current site and don't want to be shown up as incompetent.
- They don't want you to break something or make a mess they'll have to clean up.

You're going to need an evangelist in the IT department. That person's job title matters less than his or her influence. That person has to be personally liked by the rest of the IT team, especially anyone with power over the Web or tech budgets. Often the CIO has an underling who he or she asks to do a lot of the new tech research for purchasing, so that might be a good person.

Also, look for someone in your tech department who is a Web marketing geek in his or her spare time.

You'd be surprised how many people have eagerly watch their blog stats every night, or supplement their income by moonlighting as affiliates, or surf 'Get Rich on the Internet' sites as a hobby.

Start asking around. Also, check out IT staffer's Facebook pages where they may list personal hobby sites.

Then take your potential evangelist to lunch (if they are not in your location, send them a pre-paid pizza instead.) Stroke his or her ego. Never rail against the IT department's failings; show empathy for IT's heavy load instead. You're looking to make a new best friend. Next, follow these three rules of friendship:

- Make their life easier. Less work, the better.
- Involve IT in any purchasing decisions and see if you can support the growth of their budget instead of your own. Empire builders appreciate a helping hand, and IT budgets are less likely to get cut in times of crisis than marketing budgets are.
- Never, ever go behind their back. If you run a black ops test, IT better know about it. If you hire a vendor, IT better have met with them. If you pick software, IT better have pre-approved it.

The fact is, often you don't need much of IT's help to conduct testing. An external vendor can do nearly everything. However, IT's support in office politics is mission critical. Curry favor with them; you'll need it.

Educate Your Web Design Team: Qualitative vs Quantitative Testing

There's a chance that your Web design and/or development team are under the firm impression that your site has already been thoroughly tested. That's because they think site testing equals usability testing. Usability testing (aka user testing) comes from software design where it's considered an essential step in the process. Reknowned experts such as Jakob Nielsen (www.useit.com) and Steve Krug (Author, 'Don't make me Think') adopted traditional software usability testing to the world of the Web back in the late '90s and have been preaching to Web development pros ever since.

Usability testing is a fantastic, although somewhat imprecise, development tool. Through it, you'll discover major problems that some users have in navigating and accomplishing tasks on your site. It's qualitative data though, so it's not statistically conclusive. You'll learn the human reasons for some of the conversion problems your site may have. However, you won't ever discover precisely which page changes or tweaked elements will add up to the highest possible conversion rate.

If you want higher conversion rates, you need to embark on A/B split testing and/or multivariate testing. But first, you'll probably need to educate your Web team on what these types of testing are, and what they can accomplish, especially as compared to usability testing.

Never knock usability testing. It's an important part of the site design process. Plus, it can serve as a useful breeding ground for A/B testing hypotheses. Never knock your site's current design either – it's a lot easier to spot mistakes and problems after the fact as a critic than it is to build a near-perfect site from scratch. Instead, stress that users change over time, and now it's time to evolve the site using strictly scientific data and statistical measurements, to better meet their needs.

Branding Cops – How to Overcome the Agony of Stupid Brand Rules

I want to make two things very clear – an audience's brand awareness and brand perception is MORE important to your site's conversions than any test can or ever will be. Sites owned by strong, well-regarded brands convert better than sites owned by nobody-heard-of-them brands even if the latter A/B test their brains out. The hard work the branding team has already done in the external world to educate prospects about your brand is already paying off on your site. Never belittle this contribution.

Secondly, many of your branding department's, perhaps now stupid, Web rules came about as a reaction to even more idiotic Web department activities. A decade ago, when many companies were first launching significant Web sites, a lot of marketers, ad agencies, sales reps, and Web developers acted like outlaws in the Wild Wild West. They couldn't (or didn't bother to) get permission from a company-wide central authority, so they launched whatever they wanted to, whenever they wanted to. Brand executives woke up one morning to discover Web sites and microsites of all shapes and sizes mushrooming out of control. The bigger the company, the bigger the problem. (I remember talking to Oracle's CMO in 2001 about his nightmare on this front.)

Many of these unauthorized (or at least slenderly-authorized) sites were horrific from a branding perspective. Even basics such as the official logo were bungled. Driven by necessity, the branding team became the branding cops. Some of the dumbest rules now on your company books stem from that time, and were enacted in direct reaction to it.

Those days may be over, but the rules remain. My suggestion is to try to work with your branding team instead of arguing against them. Instead of asking branders what problems they are trying to stop or control, try asking them what they are trying to grow. What's their vision of how the customer or prospect should think of the brand? What's the brand's persona?

Then, lend your testing expertise to helping that brand perception strengthen. Sometimes brand rules apply directly to design – for example, a brand that wants to be seen as easy to work with, should test design that eliminates extra steps and implied frustrations such as excessive customer service phone calls. Or, a brand that wants to be seen as the best friend of the boomer generation should test making Web typeface larger, especially for body copy, so those over-50 eyes can read it.

My suggestion is to hold an off-site day with your branding department where you learn as much as you can about their image and vision of the brand. Then, together create new site rules as well as hypotheses for tests that reflect that brand. Your goal is to become brand-proactive rather than reactionary.

Among other things, ask:

- How do we want people to perceive and feel about our brand?
- How will this be measured? How is it measured now?
- What are the primary, secondary and tertiary (if applicable) brand interaction goals for every single page we're considering testing? Do these differ from conversion goals?
- Where are branding holes that need to be patched on the site right now, for example, "up periscope" activity exhibited by new visitors to deep-linked entry pages.
- How can branding be tested in conjunction with, or as an adjunct to, conversion testing?

Final note: Just as with IT, never run a test without alerting someone on the branding side first. They may slap down new rules in retaliation, often reflexively, without considering the potential value of the test they're stopping. You must get buy-in. The biggest branding rule of all is 'No Surprises.'

Run a Trial – Very, Very Carefully

Warning: don't run a black ops testing project unless you have assembled a team of evangelists from every department that have any sort of power or influence over testing's future. That probably includes branding, IT, legal and perhaps sales and/or the CFO's office. Also warn customer service. People squeal a lot harder about problems with a test that was run behind their backs, than they do for one that had their permission.

Next, pick two potential test pages or elements based on these three rules of thumb:

Rule 1: They are obviously fixable using best practices (not some big idea that pushes the envelope for your organization's style or site.) Your goal is to "prove" testing itself works, not that your personal redesign ideas are the best.

Rule 2: They're nobody's personal responsibility or favorite. They should not be the beloved baby of someone who's in the company currently. Nobody needs to have stats flaunted about the place proving they may have done their job badly. No one wants to be proven wrong publicly.

Rule 3: They get high-enough traffic to keep testing time to a minimum (at most a month, preferably less).

After that, *important*, ask your testing evangelist committee to vote on which one of the two proposed testing ideas they'd prefer to see run as the trial. That way everyone feels like they've got skin in the game. They were involved in a decision. Keep your vote to yourself. You're presenting options and obeying your committee's orders.

Finally, never, ever report back to the committee (or anyone else) on results until the data is truly conclusive. You can report on other marks of progress such as the date of test launch, the amount of traffic, the lack of customer service problems, etc. Why be so hush-hush? Because people who are not statisticians (and even a few who are) tend to take initial results far too seriously. Whatever result you reported first is the one that will be remembered and often institutionalized into corporate memory, regardless of the final test results!

Ask Vendors to Give You a Guarantee of ROI (or They Keep Testing)

If you are relying on an outside vendor to design and run tests for you, cover your risk by requesting a guarantee in writing. (No verbal guarantees.) They will not be able to predict your test ROI with any sort of pinpoint accuracy – if they said they could, they'd be lying. However, they can guarantee that as long as you give them some degree of control (which will need to be negotiated), you will end up with a certain base level of ROI or better. If the test's ROI doesn't come up to snuff, the firm has to continue testing, on their dime, until you make your money back.

Key – in order to make this guarantee, the firm will need to be involved in the choice of page and/or elements on the page to be tested. They'll also need to have access to your analytics, or be allowed to install their own. And they'll need assurances from you that as long as their test pages meet "reasonable" brand guidelines (which they'll need to see ahead of time), you won't tinker with the creative thus possibly causing the test to fail.

Make Yourself Look Good

The key to turning a trial test into an ongoing testing program is marketing. Internal marketing that is. I'm continually surprised at how many great marketers, who can get their message through to any prospect in the universe, absolutely stink at marketing themselves within their own organizations.

Your goal for your trial test is to provide data and an example that you can use as the heart of a marketing and educational campaign in-house. As the test is set up, make sure numbers will be measured that can translate to a powerful internal marketing message.

For example:

- Track Deferred Conversions: Make sure test page visitors are cookie'd and then tracked for another 30-120 days (the longer the better) so you can see if they behave differently than normal page visitors. I've known this one metric to be the number to push a testing budget onto the "most have" list because so many visitors convert on future visits rather than immediately.
- Track Saved Costs: Will the improvements from the test page enable your organization to save any costs? Is there a lower cost per lead? Per email opt-in? Per coupon download? Are there fewer calls to customer service, or perhaps more calls to sales? If you can measure your current cost per conversion (perhaps including media costs to send traffic to the page), and the test lowers them, then you have data to brag about.
- Track Broader Values: You need to track conversion lift on your test page to a broader value that can trickle down to impact the bottom line itself. If you have a long sales cycle and use search marketing, you may be able to tie Google and Salesforce together to track the value of incoming leads all the way down your sales pipeline. If you are gathering opt-ins for an email newsletter or alerts, you may be able to run your email list against your buyer file and look for overlap, thus establishing to some degree a link between opt-ins and sales. Also, look for ways to tie increased conversions to accounts with better referrals (friend tell a friend) and/or KPIs indicating higher lifetime account value.

Finally, do a presentation, or a series of presentations to share the good news about your trial test results company-wide. Don't assume other departments don't need to know or don't care to know. Gather ye evangelists as ye may! If your company is in many locations or you have virtual staff, then post a presentation on your intranet as well as a canned Webinar or a Camtasia version of your slides. Remember, the big message is not so much that a particular test worked, but that testing itself works. Testing is something worth investing in, in believing in. Testing can help your organization grow – even in the worst recession.

Go for it and good luck!

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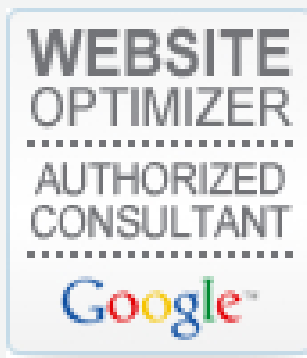
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Contact Us

Phone: 604.512.0799

Email: WhichTestWon@WiderFunnel

WiderFunnel Marketing Inc.
10th Floor, 675 West Hastings Street
Vancouver, BC V6B 1N2