

Web Optimization & Testing Best Practices

1. **Why are you testing?** First, determine your goals for doing web testing. Is your goal to optimize a specific page, a specific part of your website (example – the checkout funnel), or are you testing for a very specific element of the customer experience. Craft a unique testing plan that caters to that goal.
2. **Make sure your stakeholders are on board.** Work with stakeholders and the executive sponsor from the beginning to get their ideas of what to test and how to approach the test. It is advised that all members should clearly understand the method, process, and goals of the testing program.
3. **Define your testing metrics, along with your success metrics.** Setting test metrics and success metrics upfront helps to eliminate confusion regarding a testing initiative, and disappointment amongst your team and the executive team. Clearly define these initiative goals and track to them for ultimately team support.
4. **Try to use quantitative data to help identify and then prioritize what to test.** Use quantitative studies to help prioritize results. Use survey data, your analytics, or conduct a simple user test to help prioritize your testing plan. Start with the areas that are most crucial to your business (for example, conversion driving pages and touchpoints versus only aesthetically pleasing touchpoints).
5. **Garner a sufficient sample size before assessing results.** Don't draw conclusions based on small amounts of data, but instead ensure your test will receive a large enough sample size. Always think about statistical confidence when running your tests, if not, it can lead to having a false confidence that the results are accurate when they are not.
6. **Test during the right time of the year, and test for a good duration so that your results are reliable.** It all depends on your industry and what you are testing, but keep in mind consumer behavior, sales cycles, and peak seasons when testing. For example, conducting a test during peak seasons might skew the test results and the customer is more determined to make a purchase.
7. **Test different traffic sources separately, and create a silo in your testing.** Customers coming from each source might have different goals on the site. Ideally, test the same source using different variables.
8. **Test the difference between new and return customers – they do behave differently.** Also consider their specific traffic sources and geography. Advanced segmentations include demographic profiles, past onsite behavior, and purchases and real-time visitor behavior.
9. **If you're running a personalization test, find the right content for each customer segment.** Serving the right offer to the right customer is the difference between converting and abandonment. Personalize the offer based on past purchase history and site behavior. Serve free shipping thresholds based on past order values. For the sake of keeping a healthy margin, don't offer extravagant promotional discounts to segments that always buy at regular price.
10. **Eventually expand your test into different touchpoints to test the holistic experience.** Don't focus on one channel but take a holistic viewpoint of your brand and all its touchpoints. Extend your test plan to cover other key touch points such as mobile, tablet, and email.
11. **Test other channels in combination with site testing.** Always look to move the needle by testing throughout the site. Don't forget to test email and other marketing channels, as well as onsite testing and optimization.

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eCommerce Diligence™ Checklist

Website Optimization Key Questions to Ask Providers

Company

1. How long have you been in this business?
2. How many clients have you sold? How many have you lost, and why?
3. Is your solution geared more toward enterprise, mid-market or the SMB space?
4. What peripheral or support services do you offer (e.g., data mining, content management, analytics, personalization, consulting/implementation)?

Products/Services

1. Would you characterize your solution as a comprehensive bundle that includes technology, analysis and implementation or, more narrowly, as a hosted application that requires that I provide much of the content and effort to make it valuable?

If comprehensive:

- a. Exactly what professional services (e.g., strategy, segmentation analysis, implementation) do you provide?
- b. How complex is the launch cycle process? What specialized skills are needed from my company? How much prior data do we need to make personalization effective?

If hosted application:

- a. What do I have to do to make this work?
- b. What internal IT skills are required? How does support work?
2. What technical support services are available?
 - a. Is your support team located in the US?
 - b. What is your SLA for support issues?
3. Do you have a support knowledge base, community forum, or applications that are shared by customers?
4. How can I export data in the event I need to change platforms?
5. How do I ensure I own and control my data in the event I need to change platforms?

Features

1. What key features are included in your solution? What features are currently missing or are on your roadmap?
 - a. What features does management love? What about customers?
2. Where is your product's competitive advantage over other testing packages?
 - a. Third-party support? Price? Ease of use? Don't say "all of the above".
3. Does your product support tests for all touchpoints:
 - a. Smartphones?
 - b. Tablets?
 - c. email?
4. Does your product allow for multiple concurrent tests?
5. How does your platform integrate (functions and data) with search, ecommerce, and analytics? Please list your standard and custom-built integrations.
 - a. Do I have to completely re-organize my ecommerce data in order to use your product?
 - b. If not, how does it work?
6. Do you have a management console?
 - a. Does it include reporting and a dashboard?
7. Please describe your reporting capabilities (batch vs. real-time, ad hoc, etc.).
 - a. How do I ensure the data does not conflict with other systems?
 - b. Please provide a list of standard reports.

Pricing

1. How are you priced? Flat fee, support fee, variable by usage, or web traffic?
2. Are there any additional fees (e.g., implementation, transaction costs, overages)?
3. Please provide an estimate of my total annual cost for your service, including an ROI model. How much will I need to improve sales in order to justify this investment?

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