Adobe Target
Operational Readiness Playbook
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Date: May 2015

Playbook Objective
The objective of this document is to get your business operationally ready for the implementation and deployment of Adobe Target. This will help you and your organisation — as new Adobe Target users — to derive maximum value from your investments in Adobe technology.

Although we have seen many projects succeed, others have faltered due to a lack of internal investment in the business to ensure they are operationally ready to adopt this new technology. This playbook will help you to avoid some of the common areas we have identified as missing in less-successful deliveries.

The recommendations and best practices in these playbooks are ideally intended to be applied to your business in parallel with your technology solution deployment. This will ensure that by the time you go live with your solution, your business is positioned to realise value from your investment.

The playbooks use a common digital governance structure — focusing on the key areas of leadership, strategy, people, product and process — to deliver a robust approach to readying your business, whether you are deploying one Adobe solution or several.

This playbook should be read by:

- Chief Marketing Officer
- Head of Digital, Head of Strategy, Head of Marketing
- Head of Optimisation, Target Lead, Creative Lead
- Solution Architect, Head of Implementation, Lead Developer
- Program Manager, Project Manager, Business Analyst
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1.1 About Adobe Target

Adobe Target provides everything you need to tailor and personalise your customers’ experience so you can maximise revenue on your web and mobile sites, apps, social media, and other digital channels. Adobe Target is made specifically for marketers with an easy-to-use and intuitive interface, real-time results, and automation features.

Adobe Target combines a number of capabilities that will help your business understand the critical interactions throughout your customers’ journey with increased relevance and efficiency. By using Adobe’s powerful Adobe Targeting technology businesses can leverage data to automate personalisation – driving higher levels of engagement, conversion, and loyalty.

Adobe Target offers a range of capabilities that will help you optimise and personalise activities:
1.1.1 Adobe Target Offerings

There are three versions of Adobe Target, depending on your digital marketing needs.

1. **Adobe Target Classic**, formerly known as Adobe Test&Target, uses a form-based workflow to create and manage sophisticated A/B and multivariate tests. Digital marketers maintain complete control by quickly and easily testing multiple onsite and offsite scenarios.

2. **Adobe Target Standard** combines the capabilities of multiple Adobe Analytics tools that have been available from Adobe to date: reporting and dashboards (functionality available previously in SiteCatalyst); ad hoc analysis (Discover); Excel dashboarding (ReportBuilder); a raw data repository (DataWarehouse); tag management (TagManager), and data connectors between Adobe and its partners (Genesis). With a licence for Adobe Analytics, each of these capabilities will be available to you centrally and seamlessly via Adobe Marketing Cloud. You and your colleagues will be able to do more to generate and share insights than ever before.

Adobe Target Standard and Adobe Target Classic can be used side by side, so it’s helpful to understand the key differences between them:

- Adobe Target Standard provides an intuitive visual interface for creating and managing A/B tests and rules-based Adobe Targeting activities.
- Adobe Target Classic provides a form-based interface for setting up tests and Adobe Targeting campaigns.

Many features from Adobe Target Classic are now available in Adobe Target Standard. More features are being added to Adobe Target Standard with each release.

It is recommended that users use the new visual workflow of Adobe Target Standard. However, some users might require Adobe Target Classic for some tests.

Adobe Target Standard helps you visually create and manage A/B tests and rules-based Adobe Targeting activities.

The Standard workflow offers a simplified implementation strategy with your digital properties — just a single line of code on each page manages all communication required between your site and Adobe Target. Industry best practices are built in to Standard, and it is designed to be used by both new and experienced users. You can share data and results and collaborate easily with other team members who use Adobe Marketing Cloud.

Adobe Target Standard will continue to be enhanced with functionality currently found in Adobe Target Classic over the next several releases.

3. **Adobe Target Premium** leverages predictive technology to unlock valuable insights and take the guesswork out of marketing. It automates the Adobe Targeting of relevant
content, offers and cross-sell recommendations for marketers and enables organisations to launch automated campaigns easily with just a few clicks, driving immediate gains in engagement, conversion and revenue. Automated Adobe Targeting in Adobe Target Premium uses sophisticated, self-learning algorithms to determine and dynamically serve the right content based on a visitor's current and past behaviour. In addition, Adobe Target Premium offers integrated, easy-to-use optimisation capabilities like A/B testing of in-app content and Adobe Targeting experiences based on location and lifecycle data.

Deciding Between Adobe Target Standard, Premium, and Classic

Keep the following in mind when deciding whether to use Adobe Target Standard or Adobe Target Classic:

- You must update your mbox.js file to v44 or later and obtain the Adobe Target.js file to use Standard. These updates are also useful for integrations with Adobe Analytics.
- Communication with your sites is managed through Adobe’s globally distributed Edge network, regardless of which interface you use. No changes have been made to this system. Although the Standard interface offers a new way to create activities, stability and performance of content delivery remains at the same level as before.
- Standard does not yet support email testing. Continue to use Classic for this purpose.
- You can use profile scripts in Adobe Target Standard, but they must be created and edited in Adobe Target Classic.
- Standard currently works best in Chrome and Firefox. If you require Internet Explorer for your admin activities, continue to use Classic. Content delivery to sites works across all browsers in Standard, just as it does in Classic.

1.2 About this Playbook

This document follows a structure that will help you understand the key areas to focus on in the implementation of Adobe Target. This structure is based on the Adobe Digital Governance Framework, which creates the appropriate business environment for digital to succeed. It includes:

- **Leadership** Executive buy-in and support for the Implementation and adoption;
- **Strategy** Clarity and alignment around key business goals for evaluating digital performance;
- **People** Resources, expertise, and the appropriate team structure to run Adobe Target effectively;
- **Process** Procedures, project management, and workflows for deploying and using Adobe Target effectively;
- **Product** Solution fit, common integrations and automations.
What’s different about digital? Everything.

Adobe Digital Governance Framework

2 Leadership

Leadership is critical — it provides the foundation for successful digital transformation.

C-Suite involvement is needed to drive a digital transformation program, budget and outcome. Your role as the project sponsor is to contribute with a strong understanding of how Adobe Analytics, and digital in general, will transform the business. Position yourself as the subject-matter expert and functional leader in a hands-on mode.

A common trait you will find in successful digital teams is that they are owned and managed by people who are prepared to make the necessary investments in talent, equipment and training. Leaders are skilled at extracting optimal performance from team members and developing strategies that take full advantage of their unique talents. Leadership consists of four subcomponents: sponsorship, buy-in, communication and accountability.

Tip
Projects that have an executive sponsor, project name, defined budget & KPIs set across the team outperform those that don’t.
2.1 Sponsorship

Having an effective executive sponsor will help the project achieve maximum success. To be truly effective, this internal executive sponsor should have enough seniority and influence within the business to have buy-in from other stakeholders across the organisation. A high level of self-interest in the success of the project, a passion for digital transformation, and belief in how Adobe Target is going to transform the business are also critical.

An effective executive sponsor should guarantee that the implementation of Adobe Target stays in line with the corporate strategy, protecting it from conflicting initiatives or internal politics and helping address any limiting factors, such as resource or budget constraints.

The Four Ps of Executive Sponsorship

<table>
<thead>
<tr>
<th>Prioritisation</th>
<th>Protection</th>
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<td>To be successful, Adobe Target needs to be aligned with key business goals. The executive sponsor should provide crucial direction to the team, ensuring the implementation of Adobe Target is always in line with the corporate strategy and top priorities.</td>
<td>The executive sponsor will play an important role in protecting the digital team and the implementation from conflicting initiatives or corporate politics.</td>
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<tr>
<th>Problem solving</th>
<th>Promotion</th>
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<tr>
<td>Using their influence within the organisation, the executive sponsor should step in to remove any problems that may impede the success of the implementation, such as resource or budget constraints.</td>
<td>The executive sponsor will play a key role in championing the benefits of Adobe Target, holding people accountable, and promoting digital wins within the organization, especially among other executives.</td>
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2.2 Buy-In

Achieving management buy-in across your leadership team is also key. Having multiple change agents will help you drive adoption more easily and quickly. The responsibility for the implementation and deployment of Adobe Target needs to be shared by the entire leadership team.

It is then the Executive Sponsor’s responsibility to win over the executive team by sharing examples that prove the value of Adobe Target and digital.
Typically this focuses on delivering a better customer experience and subsequent benefits to the business.

When implementing digital projects such as Adobe Target, leaders will be responsible for monitoring different departments and teams owning different parts of the digital marketing initiatives. It is critical to make sure that all groups share a common strategy to achieve common goals. Having an internal roadshow to win support from executives will help in aligning all teams and obtaining the necessary resources for an optimal implementation.

2.3 Communication

To get the organisation on board, it is always a good idea to share the vision and repeatedly reinforce the reason why your company is investing in Adobe Target technology, by articulating both the customer benefits and business benefits. Sharing documentation — such as case studies of successful digital implementations — will help you validate why and how this investment will take the organisation to a new level. If you want the organisation to embrace digital transformation, it’s important to let employees know it’s a priority.

2.3.1 Communication Management

A communication strategy can lay out the foundation and framework for communicating initiatives and objectives across business and technology teams. It can also help by:

- Providing guidance and framework for effective communications within and outside of the project;
- Ensuring that proper protocols are always followed when preparing and delivering communication;
- Providing precise and concise project communications at the right time;
- Involving all necessary stakeholders and maintaining regular contact to keep transparency in all transactions;
- Having clear communication channels with well-defined roles and responsibilities;
- Clarifying doubts, overcoming challenges and averting risks that affect the project;
- Building trust and developing open relationships between the parties;
- Promoting openness and transparency.

2.3.2 Recommended Communications Process & Principles

You can build your communication strategy around the following key principles:

- Communication is critical to effect change. Ongoing and timely communication is a fundamental requirement to inform and respond to stakeholders about the change, its
impact on them and its outcomes; to enable feedback; to manage expectations; to ensure a smooth change transition; and to support uptake and continual improvement.

- Communication delivery is local. Communication from the local area will mean that messages are relayed in a language that is relevant to the audience. Engagement with local communicators across the business and technology spheres will increase the effectiveness of the communication.

- Communication is consistent and repetitive. With a common approach across the program, stakeholders will come to expect communication through specific methods (channels), with given formats (look) and timing. Repeating key messages through multiple channels will increase the amount of information that is absorbed.

- Communication is linked to the project objectives. By linking the communication to the objectives it provides a context and reasoning behind change. Repeatedly providing these links will serve as reminders of the wider benefits of the project.

### 2.3.3 Setting Communication Goals

All communication developed and distributed throughout the project is intended to achieve the following goals:

- Stakeholders and program/project team members are aware and informed. Stakeholders and program/project team members should receive timely information about what is happening (why, when, and how, and what it means to them). This information starts at a generic level (which is repeated throughout the project lifecycle), and becomes more detailed, specific and targeted to the audience as the project progresses. This information enables stakeholders to think about, understand, and be prepared for change and plan for future programs/project streams of work.

- Stakeholders and program/project team members are engaged. Opportunities are created and communicated to key stakeholders to support them in exploring and becoming involved in and committing to a new way of doing things, for example:
  - Different stakeholders and program/project team members will move through and transition at different rates/times.
  - Communication will aim to gain key stakeholders’ and project team members’ commitment by implementations.
  - Strategies and implementation roadmaps can be developed to manage stakeholders and project team members who are resistant to the change throughout the transitions.

Communication is two-way, with stakeholder input and feedback sought and valued at all stages.
Stakeholders and project team members expectations are managed. The aim of communication is to provide set expectations of strategic initiatives, project scope, associated constraints, risks and dependencies, explain why this may differ from expectations (in targeted messages), and to provide ongoing updates on expected and actual outcomes.

Support the acquisition of skills and knowledge: training is backed up by supporting communication to reinforce training and provide opportunities to share knowledge.

2.3.4 Recommendations on a Communication Approach

An approach to communication management for the program/project may include:

- Communications Analysis:
  - Conduct an effective stakeholder analysis
    - Stakeholder analysis is developed at the Project Board, User Group, Project Team and Stakeholder levels.
    - The Stakeholder Analysis will focus on all parties (users, management, executives or third parties) required to achieve the desired outcomes and any parties impacted by the change to ensure full coverage.
  - Categorise stakeholders into specific audiences (communication channels).
  - Identify information requirements of all parties. Ensure communication channels are in place, track required message delivery, and establish distribution lists by subject area.
    - Have regular meetings. There should be regular meetings organised with various levels within the project to ensure that there is regular communication.
    - Where project team meetings do not meet communication requirements (for example, where cross-area representation is required for specific project deliverables):
      - One-on-one meetings may be required to obtain specific input and/or deliver important messages (as required).
      - Project share drive to maintain the main reference point for overview of the project with links to documentation for wide dissemination and feedback.
A common wiki or alternate online knowledge management solution to provide access for all parties, and used by some to provide a workspace.

Project electronic newsletter or company-wide communications, providing regular project news (updates, upcoming events; outcomes) delivered by email.

Email may be used for targeted, individual or group communication – with a specific purpose.

Information distribution and reporting. Standard templates for communicating regular standard information such as project status reports, meeting minutes, and reports will be used to ensure communication is consistent and repeatable.

### 2.4 Accountability

Your organisation is investing in Adobe Target and top executives are expecting results. For this to happen, it is the responsibility of leaders and senior stakeholders to hold themselves and their people accountable — employees, teams, partners, and most importantly themselves. Start with changing the perception that accountability is about punishment and hard discipline. It should really be about learning and improvement.

To define accountability, you can create a project charter (PC). This document states that a project exists, why it is important, who is involved, its timeframes, the expected outcomes, and the resources needed for it to be successful. It also gives you written authority to begin work.

#### 2.4.1 Steering Committee

Setting up a group of high-level stakeholders and/or experts will help you achieve the four subcomponents of leadership and at the same time set direction to the project. This steering committee can also help by:

- Prioritising initiatives
- Reviewing business cases for new initiatives
- Lobbying for the necessary time, personnel and budget
- Ensuring quality in decision-making
- Encouraging a collaborative work environment
- Monitoring progress towards goals
- Controlling scope and resolving conflicts
2.4.2 Common Roles and Responsibilities within a Steering Committee

The following high-level roles and responsibilities are based on industry standard practices for Steering Committees.

<table>
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<th>Role</th>
<th>Responsibility</th>
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| Business or Technology Sponsor| The sponsor is ultimately accountable for the outcome of the project and is responsible for securing spending authority and resources for the project. Responsibilities  
  • Vocal and visible champion  
  • Legitimises and lends credibility to the strategic goals and objectives  
  • Is the escalation point for changes and issues outside the agreed tolerances  
  • Assists with stakeholder engagement where required |
| Business Executives           | The Executive’s role is to ensure that the project is focused on achieving its objectives while balancing the demands of the business. This means ensuring a cost-conscious approach, delivering a product that will achieve the forecast benefits and give value for money. Responsibilities  
  • Design and appoint the project management teams  
  • Oversee the development of the Business Case, ensuring corporate strategic alignment  
  • Monitor and control the progress at a strategic level, in particular reviewing the Business Case regularly  
  • Escalate issues and risks  
  • Be the escalation point for issues and risks, ensuring that any risks associated with the Business Case are identified, assessed and controlled  
  • Make decisions on escalated issues, with particular focus on continued business justification  
  • Ensure overall business support for project and ensure that it remains on target to deliver products that will achieve the expected business benefits. |
| Business Owner                | This role represents the interests of all those who will use the product (including operations and maintenance), those for whom the products will achieve an objective or those who will use the product to deliver the benefits and value drivers. Responsibilities  
  • Provide quality expectations and define acceptance criteria  
  • Ensure that the desired outcome is specified  
  • Ensure that products will deliver the desired outcomes and meet user
<table>
<thead>
<tr>
<th>Requirements</th>
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<tr>
<td>• Ensure that the expected benefits are realised</td>
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<tr>
<td>• Provide a statement of actual versus forecast benefits at benefits reviews</td>
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<tr>
<td>• Resolve user requirements and conflicts</td>
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<tr>
<th>Technical Owner</th>
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<tr>
<td>This role represents the interests of those designing, developing, facilitating, procuring and implementing the product. This role is accountable for the quality of product delivered by suppliers, and is responsible for the technical integrity of the project.</td>
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</table>

**Responsibilities**

- Assess and confirm the viability of the approach
- Ensure that proposals for designing and developing the product are realistic
- Advise on the selection of design, development and acceptance methods
- Ensure quality procedures are used correctly, so that products adhere to requirements

<table>
<thead>
<tr>
<th>Assurance Owner</th>
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<tr>
<td>Assurance covers the primary stakeholder interests of the business, technical personnel, users and suppliers.</td>
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</table>

**Responsibilities**

- The right people are selected to be involved in quality inspection at the correct points in the products' development
- Staff are properly trained in quality methods
- Quality methods are being correctly followed
- Quality control follow-up actions are dealt with correctly
- An acceptable solution is being developed
- The scope of the project is not changing unnoticed
- Internal and external communications are working
- Applicable standards are being used
- The needs of specialist interests (such as security) are being observed.

**Business assurance responsibilities**

- Assist to develop the Business Case and Benefits Review Plan
- Review the Business Case for compliance with corporate standards
- Verify the Business Case against external events
- Check that the Business Case is being adhered to throughout the project
- Check that the project remains aligned to the corporate strategy and continues to provide value for money

**User assurance responsibilities**

- Ensure that the specification of the users’ needs is accurate, complete and unambiguous
- Assess whether the solution will meet the users’ needs and is progressing
towards that target

- Advise on the impact of potential changes from the users’ point of view
- Ensure that quality activities relating to products at all stages has appropriate user representation
- Ensure that quality-control procedures are used correctly to ensure that products meet user requirements

**Supplier assurance responsibilities**

- Review the Product Descriptions (features and capabilities) and align to delivery
- Advise on the selection of the development strategy, design and methods
- Ensure that any supplier and operating standards defined for the project are met and used to good effect
- Advise on potential changes and their impact on the correctness, completeness and integrity of products against their Product Description from a supplier perspective
- Assess whether quality control procedures are used correctly, so that products adhere to requirements.

<table>
<thead>
<tr>
<th>Project Manager</th>
<th>The Project Manager has the authority to run the day-to-day operations with the prime responsibility of ensuring that the result produces the required products within the specified tolerances of time, cost, quality, scope, risk and benefits.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Responsibilities</strong></td>
<td>Effective project management requires that the project management team, as a whole, possesses and applies the knowledge in several areas:</td>
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<tr>
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<td>- Project Management itself</td>
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<td>- Business and industry domain knowledge specific to the project</td>
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<td>- Technology knowledge required by the project</td>
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<td></td>
<td>- Interpersonal and communication skills</td>
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<td></td>
<td>The Project Management Framework consists of five key activity groups: Initiation, Planning, Execution, Monitoring and Control, and Closing.</td>
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<td>- These are the processes or activities for managing the project and they are different from the Project Life Cycle.</td>
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<td>- The Project Life Cycle activities are generally sequential while project management activities are performed as below, because project management activities may overlap and repeat along the timeline depending on risks (for example, the controlling activities may lead back to planning to revise the project plan as a result of changes).</td>
</tr>
</tbody>
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2.4.3 Setting up a Working Group
Having a Working Group (with subject-matter experts) working below a Steering Committee will help achieve specified goals. In your Adobe Target implementation, members of this Working Group are the practitioner leads executing the project. They would meet more regularly and report upwards to the Steering Committee.

The Working Group should have a weekly discussion where issues and risks are addressed, and the status, progress and approach of the project are discussed.

### 3 Strategy

“74 per cent of business executives say their company has a business strategy. Only 15 per cent believe that their company has the skills and capabilities to execute on that strategy.”

- Forrester: Accelerating your digital business, 2013

#### 3.1 Testing, Targeting & Personalisation Strategy

A testing, targeting & personalisation strategy will give you the opportunity to identify the right content to be delivered to specific segments of visitors with different preferences or needs, and create targeted experiences for each of them.

**Testing** will help you compare a standard control sample against a variety of test samples, so that you can see and determine which one is more effective in helping you achieve your KPIs.

**Targeting** helps you detect how different segments of visitors to your website respond differently to different content. You can then leverage that information to produce and offer customised experiences that are more engaging for them. Your digital team can choose to target as part of a test, or you can just target without testing if you are certain how a specific segment will respond to your campaign.

Targeting differs from personalisation and individualisation. With targeting, the objective is to reach broad segments that will likely generate a positive impact on your key metrics or bottom line.

Dynamically tailoring your site to the wants and needs of each user is called **personalisation**. The objective behind personalisation is to give visitors a more tailored, relevant and engaging experience when visiting your site. Personalisation is an excellent tactic for improving loyalty and increasing conversion rates.

Different clients have different disciplined testing methodologies that work well given their organisational structure and resource alignment. The important thing is to follow a testing methodology that focuses on optimising the most important elements of the site.
3.2 Adobe Target Maturity Model

This in-depth assessment will show you where your organisation falls on the maturity spectrum. It will help you:

- Measure the effectiveness of your current practices
- Compare your performance to your competition
- Deliver a full report to share with your teams
- Help you develop strategies for improvement

Industry-leading marketers invest in a combination of people, processes and products to power and scale marketing initiatives efficiently. They deliver successful business outcomes and drive maximum ROI by consistently executing better than their competitors with a strong optimisation program. This assessment will enable you to identify your organisation’s strengths as well as prioritise focus areas within the six optimisation dimensions:

1. **Culture** How your organisation decides on consumer experience improvements;
2. **Strategy** The combined level of talent, technology, processes, and knowledge of the organisation's optimisation practice;
3. **Leadership** The commitment to and influence on your optimisation program key leaders in your organisation provide;
4. **Organisation** The people that work on your optimisation team;
5. **Execution** The manner in which your organisation runs an optimisation activity from conception to reporting;
6. **Reach** The extent to which your optimisation program utilises technology and spans your digital properties.

“Companies with greater digital capabilities were able to convert sales at a rate 2.5 times greater than companies at the lower level did.”

Adobe Target Maturity Model

<table>
<thead>
<tr>
<th>AREA</th>
<th>MATURITY LEVEL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>INCIDENTAL</td>
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<tr>
<td></td>
<td>EXPANDED</td>
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<tr>
<td></td>
<td>DISCIPLINED</td>
</tr>
<tr>
<td></td>
<td>STRATEGIC ALIGNMENT</td>
</tr>
<tr>
<td></td>
<td>EMBEDDED</td>
</tr>
</tbody>
</table>

Tip
Put a reminder in your diary to perform this measurement quarterly to track your progress.
| CULTURE | Sporadic optimisation activities are done by isolated teams or individuals | A formal committed program is created | A dialogue around testing is defined and communicated | There is alignment of the organisation’s goals to the optimisation program | A robust culture of testing all new content is mandated |
| STRATEGY | Optimisation is done as ideas strike | An optimisation and personalisation roadmap is created | Roadmap is influenced by a range of stakeholders across the business | Roadmap is prioritised to maximise alignment and value | Optimisation and personalisation becomes part of digital strategy roadmap |
| EXECUTION | Basic testing | Cross-site targeting | Discipline-based testing series | Constant iterative testing | Third party and mobile testing |
| LEADERSHIP | Executive sponsor driving the program | Cross-business executive participation in the program to ensure success | Participation in organisational strategy and resource planning to expand the program | Cross-business incentives tied to testing campaign program adoption | Multiple executive sponsors to secure the program’s long-term success |
| ORGANISATION | Enable your team for success with technology and optimisation best practices. | Community of practice | Agile program rhythm | Documented learning | Iterative approach |
| REACH | Document test plans, requirements, and insights and post in a shared space | Campaign velocity with standard timelines for activities | Formal training and enablement program throughout your organisation to sustain your success | A methodology for keeping track of estimated value versus realised value from each test | You are using automated targeting tools to leverage your online and offline customer data to maximise your efforts. |

You can go here to [take the assessment](#).

### 3.3 Digital Strategy

One of the biggest digital challenges organisations face is defining what they are trying to achieve through digital channels. In many cases, corporate websites aren’t owned by a single party, leading to a mix of different — or, even worse, competing — interests and purposes. This causes counterproductive results.

A clear digital strategy enables your digital team to align its activities to the key priorities of your business and succeed as an integral part of your organisation. A key point to consider is that your digital strategy should always be aligned to the overall business goals of the organisation.
A Suggested Digital Strategy Framework

These are steps you can follow to craft your digital strategy:

- Identify all of the key stakeholder groups for your company’s digital properties;
- Gather key business objectives from each group separately;
- Merge the goals into a set of four to five key objectives;
- Based on your understanding of the corporate strategy, prioritise and rank the list of goals;
- In a group meeting, review and refine the goals with key stakeholders and, if needed, involve a neutral third party to mediate potential disagreements;
- Based on stakeholder feedback, finalise the business objectives and KPIs;
- Share an overview of the agreed-upon digital strategy with key stakeholders.

Key terminology:

**Enterprise Key Business Goals:**

- Strategic business goals and objectives
- Aligned across the business at an enterprise level
- Tied to increased revenue (or decreased costs)
- Can include medium- to long-term vision of the company

Examples: Increase revenue (by five per cent), Expand product line (new line of business), Improve customer satisfaction (by five per cent)
Digital Goals:

- Strategic business goals and objectives for your digital channel
- Identify how the digital channel will contribute to achieving the Enterprise Goals
- There can be more than one Digital Goal for each Enterprise Goal

Examples: Increase online sales (by five per cent), Increase online audience (by ten per cent), Increase online customer satisfaction (by five per cent). Below is the Adobe Business Optimisation for Success framework — as you can see, defining your business goals is the key first step in this process. It’s paramount to have these communicated and agreed upfront.

Initiatives:

- Strategic digital goals
- Actionable projects
- Relates to digital channel as a whole (not just web analytics)

Examples: Reduce shopping cart abandonment, Increase mobile content, Increase new visitors.

Tactics:

- Specific actionable online business requirements
- Gaps in achieving online initiative and goals
- Achievable end goal

Examples: Measure shopping cart abandonment, Measure application form abandonment, Report mobile usage

Key Performance Indicators (KPIs):
Key metric to evaluate business success of digital activities

Example (Business Objectives & Metrics)

<table>
<thead>
<tr>
<th>Business Objective</th>
<th>Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. $500M in sales through digital channels</td>
<td>Revenue</td>
</tr>
<tr>
<td>2. Increase brand awareness</td>
<td>Visitors</td>
</tr>
<tr>
<td>3. Drive deeper and enduring customer relationships</td>
<td>Logins</td>
</tr>
</tbody>
</table>

Digital Strategy Framework

3.4 Focus

Focus means understanding and focusing on the organisation’s key business goals and strategic initiatives to achieve objectives. It is important to prioritise these goals as well as their scope and timing for completion. As competitive environments change it's also important to review your business’s strategy and goals on a quarterly or bi-annual basis to ensure they remain relevant to the current environment.

3.4.1 KPI Strategy

Focus also includes defining the key performance indicators (KPIs). In digital, these indicators can be metrics such as online revenue or order conversion rate, along with associated targets for those metrics (for example, increase conversion rate by 30 per cent).
A common mistake when setting KPIs is selecting random metrics from an industry-related list and expecting they will fit and perform towards achieving your unique business goals. Make sure you always start by understanding your business goals before selecting appropriate KPIs. As you deploy your digital properties using Adobe Target you will be able to use these KPIs to understand the impact changes in content, design and architecture have had in terms of their impact on your business.

**What are Key Performance Indicators?**

<table>
<thead>
<tr>
<th>What they are:</th>
<th>What they are not:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantifiable/measurable and actionable</td>
<td>Metrics that are vague or unclear</td>
</tr>
<tr>
<td>Measure factors that are critical to the success of the organisation</td>
<td>“Nice-to-knows” or metrics that are not actionable</td>
</tr>
<tr>
<td>Tied to business goals and targets</td>
<td>Reports (top search engines, top keywords)</td>
</tr>
<tr>
<td>Limited to 5-8 key metrics</td>
<td>Exhaustive sets of metrics</td>
</tr>
<tr>
<td>Applied consistently throughout the company</td>
<td>Refutable</td>
</tr>
</tbody>
</table>

### 3.5 Alignment

Organisations are dynamic. Business strategy changes, leadership changes, websites and communications in general are redesigned, the market landscape changes, services and new products are introduced, marketing campaigns are launched, new channels appear, new competitors are born, and so on. All these changes make it hard for leaders to ensure alignment between the company’s current strategy and the implementation of digital solutions.

To make sure there is a proper alignment between your Adobe Target implementation and your digital strategy, your measurement strategy needs to be dynamic, and adjust as changes occur within your business. Having a member from the digital team sitting in the Steering Committee can ensure that the team knows what is happening within the business and any possible changes in priorities.

#### 3.5.1 Measurement Strategy

A web measurement strategy is a clear, cohesive strategy for measuring online business performance against business objectives. It encapsulates the organisation’s current online business objectives and strategy, KPIs, and other unique reporting requirements.

Why do we need a measurement strategy?

- **Understanding** Without well-defined KPIs, you’re not going to understand business performance and take appropriate action.
• **Greater buy-in and adoption** By involving key executives and stakeholders in the business requirements gathering phase, you increase their interest in the project.
• **Alignment** Having everyone focused on what’s most important to the business is extremely valuable.
• **Avoid costly missteps** These may require re-implementation and delay “time-to-value”. Measure twice, cut once.

The objective behind a good digital measurement strategy is to obtain accurate measured results of your digital marketing investments. It will help you understand your business goals, KPIs and reports which, at the end, will help you understand your business performance.

**Measurement Strategy: Three Stages**

- **Gather**
  - Review current strategy and potential gaps
  - Collect business requirements from all stakeholders
  - Ensure no group’s needs are overlooked

- **Refine**
  - Clarify business goals or requirements
  - Avoid leaving out implied/unstated goals or requirements
  - Separate strategic goals from tactical requirements
  - Prioritise competing business objectives or requirements

- **Align**
  - Secure senior executive buy-in by involving them in the process
  - Balance group needs with organisational needs
  - Ensure all employees are aligned with clear goals and strategy

Capturing data about customer interactions across multiple digital marketing channels is easier than ever. The challenge is being able to understand and convert that data into actionable responses that increase customer interactions and help your business grow. A well-structured digital measurement strategy will help you plan, organise and coordinate all the necessary elements needed to manage the big volumes of data being produced, as well as making sure this data is put to work throughout your organisation.

3.6 **Innovation**

Once your organisation is successfully collecting and analysing the right data on a reliable and consistent basis, you are in a good position to innovate. This can be accomplished by using this data to gain competitive advantage. Your organisation will be able to explore new applications and new ways to extract even greater value from your digital data. Your company may even be able to transform data into unanticipated revenue streams via new products or value-added services for your customers or partner networks. The opportunities are limitless, once the foundational pieces are in place.
4 People

4.1 Expertise

Expertise refers to the different skills required by your organisation's digital and technical staff, business users, and senior executives. Not every group will need the same skills, but an overall understanding of how a digital strategy and Adobe Target will help the organisation is fundamental.

Investing in training is a key activity when implementing new technologies. Make sure you have training programs not only for onboarding new staff, but also for current employees so they can continue growing their expertise over time.

Adobe offers a wide range of courses that can help you with your Adobe Target implementation. These courses are available in multiple formats and channels to suit your needs — at one of our regional training centers, online as virtual learning, or on-site at your company.

To see all Adobe Target courses go to Adobe Target Course Catalogue.

4.2 Structure

A well-designed organisational structure will give you and your staff clear guidelines about how the organisation is put together, who they have to report and delegate to, and how information flows across different levels. Defining an organisational structure — including roles and responsibilities — before starting with your Adobe Target implementation will also ensure the project runs efficiently.

4.2.1 Structure Types

Below is a common list of organisational structures we see in digital organisations.

<table>
<thead>
<tr>
<th>Structure Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dispersed</td>
<td>This structure is typically an early-stage organic and reactive response to initial staffing and resourcing requirements arising in local or specific departments. While this works well initially, it has limited strategic scalability and can prove problematic in coordinating a top-down strategic vision for the long-term structure and direction of digital capability — particularly within a large and diverse organisation.</td>
</tr>
</tbody>
</table>
Centralised Digital marketing roles and capability are centralised into a single area or team. This is typically characterised by a reporting structure through to one head of digital, e-business, or e-commerce.

Hub and spoke A combination of both, typically whereby digital marketing expertise is split, some positioned at the centre looking across the whole organisation, and some within divisions or departments, often acting as a connection point between the CoE and local non-digital teams.

Dandelion Organisations have a hub-and-spoke approach but across multiple units or divisions. Usually larger corporations that are operationally divided around key audiences (B2B and B2C for example) that might centralise some key digital capability across the entire corporation, but also could have some hub-and-spoke arrangements in each of the key divisions.

Holistic, or Honeycomb. Each employee is empowered with capability. This structure might be interpreted as the equivalent of a fully integrated digital capability, where digital expertise and skills are the domain of a broad range of people and roles throughout the organisation. In this scenario no specialist digital roles exist, and no single role has digital capability as its sole remit.

4.2.2 Project-Based Recommended Organisational Structure
4.2.3 Business Recommended Organisational Structure

Most organisations use a centralised model for digital implementations. In this structure, all of the digital resources are centralised into a single area or team, often with a reporting structure through to one Head of Digital, e-Business, or e-Commerce.

The previous example is a generic example of an organisational structure. We can help you develop the right size and structure according to your needs and project scope.

The main advantages of having a centralised model are:

**Consistency and control** Consistent methods, procedures, and terminology.

**Governance and focus** Unified commercial entity, strategy and budgets; ease of securing senior management buy-in to digital marketing strategy and projects; consistent standards, greater efficiency in the allocation of resources, ease of project prioritisation across the organisation.

**Scalability and support** The application of digital expertise to support the wider business; clarity on where to go for support and advice.

**Tip**
The above model will need to be right-sized for your business depending on the size, structure and geographical nature of your business.
4.2.4 Roles and Responsibilities

4.2.4.1 In a centralised model

**Director of Digital**

- Director of digital analytics, marketing analysis, CRM, or business intelligence;
- Position of authority to influence others;
- Key point of contact for executives and business owners or analysts;
- Focuses on corporate-level issues, but maintains visibility into regional or business unit issues;
- Works closely with executive sponsor to drive value from analytics across the organisation;
- Drives cultural change and product adoption within the organisation via user education and other interactions;
- Manages core team and commercial relationships with analytics vendors.

**Head of Strategy**

- Drives and owns the digital strategy roadmap;
- Coordinates the ongoing strategy workshops with stakeholders;
- Ensures the business is continually focused and aligned with business objectives;
- Determines priority of new implementation projects;
- Drives the digital Steering Committee, not just a “web analytics” Steering Committee;
- Manages the business analysts and project management resources.

**Head of Optimisation**

- Owns the testing roadmap;
- Drives the Personalisation Adobe Targeting strategy;
- Works collaboratively with the senior analytics team on supporting analytics and optimisation actions through testing;
- Manages the testing resources;
- Manages ongoing relationships with testing product vendors;
- Coordinates with the Head of Implementation on testing implementation needs;

**Head of Analytics**

- Focused on overall digital performance — digital analytics being the barometer of that performance;
- Runs regular meetings (weekly or monthly) with stakeholders on digital channel performance;
- Establishes enterprise-wide standards;
- Manages ongoing relationships with analytics vendors.
Head of Implementation

- Owns the analytics solutions’ design architecture;
- Key point of contact for technical aspects of web analytics for one or more business units;
- Works collaboratively with core team on enhancements;
- Manages the implementation resources;
- Manages ongoing relationship with internal integration teams.

Business Requirements Specialist

- Defines prioritised projects;
- Runs workshops to gather business analytics implementation reporting requirements;
- Develops the business requirements document for each project;
- Gathers business sign-off;
- Works collaboratively with core team on requirements — gathering enhancements and documenting the process;
- Acts as Project Manager, or PM is outsourced.

Adobe Targeting Lead

- Drives the testing roadmap;
- Owns the key and complex testing campaign initiatives;
- Key point of contact for testing technical aspects;
- Owns the testing, deployment, and QA process, and manages ongoing data accuracy;
- Mentors the testing specialists.

Digital Analyst Lead

- Focused on measuring the business unit’s key performance indicators (KPIs) and optimising the business unit online;
- Owns the analytical reporting requests log;
- Single point of contact for users within business unit, and understands users’ changing needs;
- Validates data collection for business unit;
- Meets with business unit reporting owners and core team on a regular basis (monthly);
- Informs core team of business unit activity and champions its needs to the core team;
- Coordinates QA efforts and manages ongoing data accuracy.

Digital Implementation Lead

- Drives the testing roadmap;
- Owns the key and complex implementing initiatives;
- Key point of contact for technical aspects;
- Owns the testing, deployment, and QA process;
• Mentors the implementation resources;
• Maintains library of implementation documentation, and shares knowledge within the organisation;
• Active participant in the deployment enhancement process.

Content Strategist

• Drives the content strategy;
• Owns the content delivery roadmap;
• Manages the content delivery team.

Technical Requirements Specialist

• Defines prioritised projects;
• Runs workshops to gather technical requirements and identify risks;
• Develops the technical documents and deployment plan for each project;
• Gathers sign-off;
• Works collaboratively with core team on requirements — gathering enhancements and documenting the process.

Adobe Targeting Specialist

• Owns the testing and Adobe Targeting campaign initiatives;
• Gathers the individual campaign objectives and requirements;
• Coordinates implementation campaign needs with the Adobe Targeting Lead;
• Key point of contact for individual campaigns;
• Delivers the individual campaign reporting and analytical insight.

Digital Analyst Specialist

• Gathers analysis requirements from the business;
• Delivers reporting requirements analysis, insight and actions;
• Presents analysis back to the report owner.

Digital Implementation Specialist

• Drives individual implementation projects;
• Coordinates with internal and external development resources on implementation requirements;
• Creates the individual project tech specification documents;
• Provides assistance on deployment and testing;
• May be assigned to a specific business unit.

Content Producer
• Maintain communication among cross-functional teams;
• Own the process for creating, enforcing and managing the content production plan;
• Collaborate with all departments to define and manage goals, scope, specific deliverables and scheduling needs;
• Aggregate and distill input from all areas of the organisation and develop the best approach for incorporating feedback into project executions;
• Contribute to strategic thinking around content models that adapt, scale and expand over time and distribution platforms.

Project Manager

• Outsourced initially and then established as a full-time employee;
• Responsible for costing, estimating and planning projects;
• Preparing project initiation documentation;
• Responsible for ensuring best value is obtained for the project including supplier base, use of internal and external resources;
• Maintaining and completing project KPIs;
• Writing detailed and summarised project progress reports;
• Identifying, costing and processing any contract variations;
• Tracking activities against the detailed project plans.

Creative & UX Designer

• Conceptualise and create design content for all campaign testing and Adobe Targeting experiences;
• Test concepts, perform task and user analysis, and assist with user acceptance testing;
• Develop prototypes that succinctly illustrate hierarchy and navigation;
• Strategise and drive interactive product development from site map to launch;
• Create compelling online consumer experiences that drive business results;
• Possess knowledge of prototyping and wireframe creation tools.

Channel Analyst

• Specialise in a particular channel: SEO, SEM, Display, Social, Affiliate, etc.;
• Understand online strategy and how this breaks down into multi-channel web marketing elements;
• Possess expert knowledge of key analytics tools and the ability to set up advanced tracking/reporting mechanisms and capture key metrics;
• Monitor and analyse web related data across the board, and analyse key metrics;
• Understand how different elements of web strategy relate to, and complement, each other (such as organic SEO, social media PPC) and create metrics to monitor and measure this;
• Real-time, daily and weekly campaign performance reporting. Presentation of key data and conclusions to management.
Mobile Implementation Analyst

- Drive individual implementation projects around mobile;
- Coordinate with internal and external development resources on implementation requirements;
- Create the individual project technical specification documents;
- Provide assistance on deployment and testing;
- May be assigned to a specific business unit.

Mobile Content Specialist

- Maintain communication among cross-functional teams;
- Own the process for creating, enforcing and managing the content production plan for mobile;
- Collaborate with all departments to define and manage goals, scope, specific deliverables and scheduling needs;
- Aggregate and distill input from all areas of the organisation and develop the best approach for incorporating feedback into project executions;
- Contribute to strategic thinking around content models that adapt, scale and expand over time and distribution platforms.

4.2.4.2 Key Teams and Roles

Business Users: Product Owners and Input Providers

- Provide overall business strategy and goals for products;
- Develop key messaging and customer segmentation strategy for online sales;
- Not involved in day-to-day management of the website.

Marketing: Brand Awareness and Site Management

- Develop strategy for product marketing across all channels including Adobe.com;
- Drive day-to-day site marketing (content changes, testing etc.) activities;
- Provide market research and analytic support for site management;
- Partner with Sales to deliver online revenue.

Sales: Online Revenue and e-Commerce Business Strategy

- Own strategy and execution for all e-Commerce-related aspects of the site;
- Develop growth plans and deliver on business objectives;
- Partner with Marketing to deliver online revenue

IT: Implementation and Delivery
• Support delivery of site strategies and objectives;
• Develop technical strategy to deliver business vision;
• Partner with Marketing Product Owners to enhance platform framework with new templates/components and capabilities.

4.3 Resources

You will need to decide on the right balance and allocation of internal staff and external consultants. This will be determined by your organisation’s previous experience with digital implementations — less-experienced organisations may require more help from consultants.

Internally speaking, your organisation will need to implement a talent strategy to determine how best to hire and retain digital and analytic talent.

“Having the right talent and sufficient resources on your digital team is crucial to your long-term, data-driven success.”

Brent Dykes — Adobe

4.3.1 Resource Model

To get the most out of Adobe Target, and to deliver a better digital experience to your customers, you need to get the most out of your implementation. Investing in external resources will help you optimise your investment, mitigate project risk and identify new opportunities.

4.3.1.1 Adobe Consulting and Partners

Organisations are facing a deficit of digital marketing expertise. Adobe Consulting and partners can play a critical role in your deployment of AEM within your business — implementing it, running and operating the solution, and realising value through business optimisation. Based on your resources and the project scope, working with Adobe Consulting and partners can help you in many different ways: developing your customer journey with a creative user experience; building your content strategy; defining your workflow processes; training and enablement; building your page template and components; making necessary customisations to the implementation, integrating with other technology platforms, and providing general guidance on how to use the solution.
Benefits of working with Adobe Consulting and partners:

- Make our customers more confident in the project delivery;
- Compress timelines through parallel delivery using Adobe GDC resources;
- Avoid “fire-drills” — reduce risk in the project from the start rather than finding issues later;
- Provide active input, accelerating and maintaining knowledge transfer;
- Handle the complexity of marketing technology deployments;
- Increase visibility inside Adobe, and create easier access to key expertise;
- Support direct to your offshore teams.

Adobe Consulting and partners help in delivering:

<table>
<thead>
<tr>
<th>INvolvement</th>
<th>Recommendations</th>
<th>Project Score</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Best Practices</th>
<th>Adobe Developer</th>
<th>Alignment Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development approach Build Planning, Data Flows, Security and System Integrations</td>
<td>In the development team (recommended)</td>
<td>Strategy, Organisation Maturity, Implementation Roadmap</td>
</tr>
<tr>
<td>Team / Skills</td>
<td>Training Recommendations, Up skilling</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Architecture</th>
<th>Workshop / Discovery</th>
<th>Health check</th>
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</table>
4.4 Community

Encouraging the creation of a digital community within your organisation is key. Invest in creating an environment where all members can learn from each other and share experiences, ideas, and best practices. When you have distributed analysts and business users across different business units and countries, the digital optimisation community provides valuable support to new users as well as opportunities for more advanced users to share their collective knowledge. Community can be fostered in a number of different ways, such as a simple email distribution list, internal wiki, corporate chat groups, and workshops.

4.5 Culture

Some organisations may be more resistant than others to embracing change when it comes to the adoption of new technologies and business processes. Despite the fact that your organisation has invested in Adobe Target, some leaders and employees may still doubt the benefits of the solution. Probably they don’t fully understand what analytics, automation, content management, user experience and other components of digital bring to the table. This is common in a business world that is still adapting and changing into digital.

Changing culture inside an organisation is a difficult but not impossible task. It usually starts by having a clear vision of the future, followed by strengthening change with management tools such as role definitions and measurement and control systems. Don’t forget to involve key stakeholders and share that vision of the future across the organisation. One of the main reasons why organisations fear change is because they have little or no information at all about where the change is taking them.

4.5.1 Developing a culture of analytics and testing

A company with a culture of analytics and testing does not pick a landing page based on which one the CEO likes, or which one the designer thinks is the most attractive. Rather, it runs A/B tests on different variants using analytical tools, and makes a decision off the data.

Tip

To generate excitement and a focus on testing in your business, create a competition to guess the winner

Creating a culture of testing and optimisation in your company is all about sharing. Share wins, success stories, strategies and your company’s digital vision across all corners of the business. Make sure everyone inside your organisation, especially decision makers and executive leaders, understands and helps you push your digital initiatives — and have them share test ideas. Sharing, including and integrating guarantees support down the road.

Incorporating analysis into the testing process has enabled our customers to adopt a data-driven culture. Rather than teams trying to imagine what users want, they can use the data to learn what features actually resonate with audiences. The use of
testing also lowers risk by exposing only part of an audience to a change, rather than rolling it out across the website and hoping for positive results.

A good example is Restaurants.com. The results from early tests were compelling, with analysis from Adobe Marketing Cloud clearly demonstrating how tests with Adobe tools positively impacted revenue across the site. By testing the effectiveness of the add-to-cart module on the restaurant details page, the company achieved a five per cent lift in conversion and an eight per cent increase in revenue.

By integrating rich testing capabilities and advanced analytics available in Adobe Marketing Cloud, Restaurant.com can now measure and evaluate customer preferences, as well as optimise visitor experiences, to extract the most value from each interaction.

5  Process

In this section of the document, you will find the information you need to deploy and use Adobe Target effectively. There are four main types of processes: deployment, usage, sustainability, and change management.

5.1  Testing Methodology

The evolution of your program from random testing to discipline-based testing is designed to guarantee that you are as efficient as possible with your program and your resources.

Random Testing

When companies first begin testing, it is very common to see them take a random, ad hoc approach. If something sounds interesting, they test it. This approach results in two problems: first, they never see the connection between the tests; and second, they are assuming that what they are testing actually matters. Organisations will often dive in with a long list of test ideas that may or may not be effective. For example, by testing an isolated element on the page (such as a hero image) they are making the assumption that the hero image actually matters. It is quite possible that the elements they never test are the best possible elements to test.

While there is still money to gain from random testing, it is considered the least efficient testing strategy because a test that isn’t part of a series is often full of assumptions. With random testing, it is also very difficult to know if you can apply what you learned from one test outside the very narrow conditions of that test.

Iterative Testing

When you allow the insights you have gained during prior testing to guide future testing, this is considered iterative testing. In other words, you are building upon learning from past tests. If you test a button on the home page and discover that the colour is very influential for conversion, this knowledge can be used in future tests — with this knowledge in mind, run new tests to get a better understanding of which particular colours are best. Upon discovering the
best colour, follow up by testing the winning colour on other pages or sections throughout the site. Iterative testing will yield a significantly greater ROI than random testing.

Disciplined Testing

Disciplined testing is the most effective testing strategy. The key difference between iterative testing and disciplined testing is that disciplined testing focuses on the elements that are truly important. Disciplined testing helps you identify which areas matter the most and allows you to focus your resources and efforts on those areas. In other words, you are looking for the most efficient way to get wins. This testing strategy helps organisations get past guessing what is important, and instead focuses on the true opportunities. Different clients have different disciplined testing methodologies that work well given their organisational structure and resource alignment. The important thing is to follow a testing methodology that focuses on optimising the most-important elements of the site.

Below is an example of one disciplined testing methodology that has proven successful with many clients. It starts at a high level and moves towards identifying where the next tests should focus. It nearly eliminates all biases and methodically identifies where the best opportunities are.

The steps are as follows:

1. Identify a starting point;
2. Determine the design/layout;
3. Identify which pieces belong in the picture;
4. Understand the influence of the elements;
5. Eliminate options at each step.

Each step is outlined in more detail below.

5.1.1 Identify a Starting Point

One of the keys to strategic testing is testing the right areas of a site. The first step is to determine a logical starting point. Avoid selecting a starting point based on personal preferences or mere guessing. Instead, focus on either highest-traffic entry pages and page types, or pages directly involved in the conversion process (like checkout flow). If the goal is to increase signups, then select a page or page type that falls within that signup process. When identifying the right starting point, use available resources like your company’s web analyst and analytics consultants. Please note that if you are prioritising testing candidates by the amount of traffic to a page, base it on visitors, not visits or impressions. Website changes are felt at the visitor level, not with each page load.

Sometimes the starting point will be a particular page with a unique URL. Other times, your starting point may be a page or template type, such as a product page or an article page. The
important thing is that your starting point sees high traffic and is part of the user experience you are intending to optimise.

After identifying the starting point, verify that the goal of the page matches your optimisation goal. For example, the “About Us” page probably will not have much to do with increasing cart purchases, so changes to it will not result in much of a lift in overall site revenue.

5.1.2 Looking for test ideas

When looking for ideas to test, look for things that:

1. Create friction making a step or process longer or harder;
2. Lure away from a step or process;
3. Hide or blur a step or process;
4. Dead end a step or process;
5. Make a step or process unclear.

Friction means making things harder than they should be or take longer than they should. The more hoops you make your visitors jump through, the more frustrated they get.

Look for friction in these areas:

1. Forms;
2. Checkout flow;
3. How many clicks it takes to get to a product;
4. How many clicks it takes to find content;

“Lure away” means any call to action or distraction that takes people away from the primary call to action.

Look for the “lure away” in these areas:

1. Secondary calls to action;
2. News links;
3. Links to blogs;
4. Articles and funny stories;
5. Widgets;
6. Surveys;
7. Ads and sponsors.

“Hide or blur” means that so much is happening on a page it’s hard to discern the primary action to take.

Look for “hide or blur” in these ways:

1. Busy pages;
2. Pages with many links;
3. Pages with many colours;
   Flashing links and banners.

“Dead end” means pages or areas of a site that end without a call to action, leaving the visitor no choice but to go back.

Look for “dead ends” in these areas:

4. Error pages;
5. About Us pages;
6. Company info pages;
7. Confirmation pages;
8. Any page that ends without a clear action.

“Unclear” means pages or actions to take that are ambiguous or unclear in their intent.

Look for “unclear” problems in these areas:

1. Navigation or actions that buck convention;
2. Wordings on actions that are confusing.

5.1.3 Determine the Design/Layout

Now that you have identified a starting point and verified that it is in line with your optimisation goal, the testing begins. Start with the layout. Should the page be a two-column page or a three-column page? Should it be tall and narrow, or short and wide? Identifying the proper layout will be helpful for moving forward. To do this, create three or four alternative layouts using all of the
current elements on the page. The next step will focus on identifying which elements belong, but for now just focus on the layout of the page.

5.1.4 Identify Which Pieces Belong in the Picture

After an ideal layout has been chosen, move to the individual elements on the page. Not everything on a web page belongs there and, conversely, some things that should be on a page may not currently be included. Many design and marketing teams have lost focus on the primary purpose of their pages, and the result is clutter. There will be more on how to handle the goals of competing groups later in this document. Fortunately, there are steps to determining which pieces belong in the picture.

Existence Testing (Inclusion/Exclusion)

An inclusion/exclusion test simply removes elements from the page one at a time in individual experiences, to see how their presence or absence influences the visitor’s experience. In this scenario, you should look for any type of significant reaction. This means learning from negative reactions as well as the positive.

Through inclusion/exclusion testing, you can identify which elements belong on the page. During this process, you will group elements into one of three different categories: elements that positively impact your goal, elements that are neutral, and elements that negatively impact your goal.

Elements that Positively Impact

These elements drive success on your page. They manifest themselves when you remove them and the result is a negative lift. If removing an element from the page leads to a drop in conversion or success, this is a strong signal that this element is something that positively impacts the goal of the page. As you are discovering which pieces matter, look for elements that cause conversions to drop when removed from the page. While this may frighten some, it is exactly the thing that helps you identify where to focus your efforts. If you get a strong signal, like negative lift, then you know the element really does matter to the page. Instead of guessing what’s important, use the data. With that data, you can focus your testing efforts on the elements that matter the most.

Elements that are Neutral

If there is no noticeable lift (positive or negative) when an element is removed from a page, you can conclude that the element does not really help or hurt your goals for the page. These neutral elements may be part of a longer-term strategy, such as branding. In any case, they can be included or removed at your discretion.
Elements that Negatively Impact

Finally, if removing an element from the page results in a positive lift, you have discovered an element that is actually hindering success on the page. Discovering which elements negatively impact your goal is an important part of any testing methodology. If something on the page hurts conversion, testing will help you quantify that negative influence. This will lead to more-informed business decisions.

It is important that you follow up your initial findings with a test combining permutations of elements. Two elements may appear neutral when tested individually, but when they are excluded together, the signal may be very different.

5.2 It's a Process not a Task

Optimisation is not a one-time action. It does not start or stop with any given test. Optimisation is about constantly changing a page or a user flow to meet new needs and new users as your site evolves. In order to ensure this, make sure that you continue to test key pages regularly. You may shift the speed or the execution, but it is important that you never think of a page or a section as “done”. Every time you test something, you are not only improving it — you are changing it to meet the current needs of your users.

5.2.1 How to Turn an Idea into a Disciplined Testing Series

What do you do if your CEO comes to you with a random test idea? One of the most challenging problems groups face is translating individual test ideas into a strategic disciplined testing series. Here is an example of how you can take an idea and spread it out over a series of tests to get the most value out of your individual testing ideas.

The Initial Idea and Its Flaws

Suppose you get a testing request like this:

“We want to test a different offer in our carousel to return users on our front door.”

Individual tests are usually less valuable because they include many assumptions. Here are some of the assumptions you would be making if you launched this test:

- The banner is in the right place;
- The front door is the most important page to test on;
- Return visitors matter;
- Changes to the front door are more valuable than other changes;
- Content (the offer) matters on the banner.
The goal of a disciplined based testing program is to challenge assumptions and to make sure that efforts are focused on efficiency and getting the largest bang for your buck. In order to challenge assumptions, everyone in the testing program needs to check their ego at the door and assume ignorance. You really don’t know the best option for every page and every element on the page until it has been tested.

5.2.2 A Scientific Method of Testing

1. Define the question based on business goals;
2. Gather information using the step-and-process methodology and analytics;
3. Design the test using pre-test questions and test design methodology;
4. Perform the test;
5. Analyse test results;
6. Interpret data and identify follow-up tests;
7. Start follow-up test.

5.2.3 Challenging Assumptions

Let’s re-evaluate that test idea:

“We want to test a different offer in our carousel to return users on our front door”.

Good questions to ask instead might be “What type of content should we target to return users?” or “Who should we target content to on our carousel?” The first question removes the assumption that you know what banner content is most effective. The second question removes the assumption that you know return visitors are an important segment.

Even better would be “What areas are best to serve targeted content to on the page and who should we target them to?” This question removes the assumption that you know the banner is the best piece of content to begin with and the assumption that return visitors are valuable.

Or the best question might be “What should we do to make sure that this page is creating the most value for the site as possible?” This is the best question because it takes an agnostic view of the page. It focuses on seeking to identify the most valuable elements on the home page without any preconceived notions that any one thing is better than the rest.

5.2.4 Translating business questions into a testing series
Taking that last question, here is an example of how optimisation programs make a test series out of the test idea to get the most ROI.

First, test the layout of the page. Rather than just focusing on the banner, take all the same elements from the page and try them out in at least two other configurations. You are not introducing any new creative here, you are just reorganising it. Based on this test, you would have a new page design.

Second, once you have a new page layout, figure out what parts of this page are positively and negatively impacting page performance. To do this, run an inclusion/exclusion test where each experience features the removal of one of the non-required parts of the page.

Third, based on the results of this inclusion/exclusion test, run a test containing various permutations of the elements that were excluded from the previous test. Your goal is to learn what is important and to end up with the optimal page that only has elements that are beneficial to the page and site goals. This could mean that the banner doesn’t even end up on the final page! By this point, you should see a large lift based on the removal and usage of your existing elements, without the need of making new creative or changing site functionality. You have also removed items that you know are not positive, thereby better helping you focus on elements that are driving site success.

Fourth, prioritise your tests for the remaining elements. The best way to do this is to use a multivariate campaign. For example, after selecting three elements that you have previously proven to be important, create two alternatives for each element. The resulting element contribution report from your multivariate test will show you which sections have the most influence over user behaviour. With the results of this multivariate campaign, you can now prioritise upcoming series of tests for each element. Through the use of segment filters you would also know which groups are exploitable by finding the ones that are most influential to each segment.

Fifth, focus your next series on the element that is most valuable. This is when you can understand if the banner was important to test in the first place. Break the element down into sub-elements that make up the whole of that element to further understand what changes are most valuable. For example, the sub-elements of the banner may include an image, headline, and the value proposition. Optimise these elements the same way you did with the page by testing the layout, existence, and alternatives of each element of the banner.

### 5.2.5 Segmentation Strategy

One other thing to remember through this entire process is that you are incorporating segments into your test designs so that you can identify segment patterns across tests. Look for segments that have different winners than the aggregate test population. If experience A wins for new users and experience B wins for returning users, this means that changing that type of content for that group is valuable. Conversely, if experience A wins for both new and returning users, then there is no value in serving one thing to group A.

**Tip**
Before running any test always ensure you have segments set up for your reporting. You will find invaluable insights even from the most basic segments.
and a different thing to group B. In fact, that means you would lose value by serving different content.

5.2.6 Efficiency and Buildable Learning

The beauty of this approach is that while there are an increased number of campaigns, there is very little new creative being done. You are simply working with what is currently on the page to best understand what is valuable. By using this approach you are getting more and more value and learning more and more at each step, guaranteeing the most value for the current test and for future tests on the site and page. You also may find that many of your initial assumptions were wrong, thereby informing future product decisions and greatly improving overall testing efficiency.

While this seems like a huge endeavour to test something like banner creative, understand that you’re learning as you go, and the insights you get from this test (and any previous test) will also influence what you need to do next. If you’ve already learned that the banner is important on the page, testing the importance of the banner is one less thing you need to confirm. When given a test idea, take what you know and verify the efficiency of testing that creative to move yourself closer to the optimisation zone.

5.2.7 Learning and Reporting

The power in a testing tool is its ability to help you learn about how changes to your site have an impact on different types of people. Additionally, the more you learn about your most valuable user groups the more you can tailor your site to meet their needs. Understanding what you learned from each test and building upon those tests will maximise the value of your site to your users. Reporting is the tool that helps you clearly identify those key test insights.

5.2.8 Learning Versus Lift

The lift between two experiences is an output of the reporting interface, but it is only important if it helps you better understand what is happening on the page when something is changed. Focusing on any one number in a report can hinder a testing program, because metrics cannot build upon each other like iterative learning can. For example, if you run a test and get a three per cent lift, but you learn that all of the calls to action on your site should be blue, you have learned something useful even though the lift is marginal.

If, after a test is run, everyone asks “What was the lift?” rather than “What did we learn?” the testing program may be focused on metrics and not learning. A testing program that falls into the trap of focusing on a single test’s lift may be missing efficiencies of scale to take concepts from one test and apply them to other parts of the site. You will also miss the opportunity to inform future product discussions to ensure maximum revenue gain for future site changes. This
prevents the team from reaching the optimisation zone, because it understands less about what caused the lift and to whom it mattered (see “Learning Across Campaigns” below). Success and failure of any test or testing series is determined before the test is launched, not by the results.

5.2.9 Interpreting Results

Understanding test reporting is as much an art as it is a science. The art side is the interpretation of the numbers and what those numbers mean for campaign learning. The science is a little more concrete, focused on the statistics and data of the test results. There are three factors to consider when deciding upon a winner for a test.

Data consistency and duration of the test. As a best practice, a test should be run for one to two weeks. It should also have consistent data for a minimum of seven of those days. This may mean that the test needs to run longer than two weeks.

Credibility of the data by having enough data points. The level at which you reach a critical mass of data depends on the site, but generally it is a minimum of 100 conversions per experience. More conversions are better than less, especially with multivariate testing. Consider increasing the required number of conversions per experience by 50 for every multivariate test design requiring more than four recipes. For example, a five-recipe multivariate test should have 150 conversions per recipe, a six-recipe test should have 200 conversions, a seven-recipe test should have 250 conversions, etc.

Differentiated data. This means the test should produce lift results that are significantly different. Any test where the experiences only show lift below two per cent can be considered the same — meaning the data isn’t showing that the experiences are different enough. To declare a winner, look for drastically different data with lift numbers above two per cent.

As a reminder, look at segments for each test to identify who the change impacted. As discussed earlier, the change itself is not as important as to whom that change matters.

5.2.10 Build and Learn

What did you learn from this test? The answer to that question will determine if the test was a success. If you learned something valuable, the test was set up and run properly and, therefore, it is a success. If you don’t know what you learned, then the test was a failure. When following the strategy described earlier, you’ll have a better chance of pinpointing specific insights from your tests. Once you have identified what you learned, you can build upon it or move on to something else. Building learning upon learning will increase your ability to achieve enviable ROI faster. Use these questions to help you become an iterative tester and build upon what you learn.

What Did We Learn?

How can we take what we learned and make it better? Were there possibilities that we didn’t explore? Can we do more of the same thing? Can we apply this to other areas of the site?
Make sure that you record the test result, the recipes, and most importantly what you learned in a central repository. You should always translate the test results into the bottom line — how did the test impact your site’s success? A three per cent lift should always be communicated in terms of the estimated monetary impact to the program. Every company needs to understand the monetary value of their primary success metric. If your primary metric is leads then you must understand the value in dollars of each lead. Always communicate lift results as estimated monetary impacts, so that your company can quantify the value of the testing program and better estimate which areas of the site should be focused on for future testing to maximise the total value gained.

5.2.11 Learnings Across Campaigns

One test by itself is extremely limited. A single test is like a puzzle piece — by itself it says very little about the bigger picture. Each successful test (a test with valuable learnings) run is another piece of the much larger puzzle of understanding your site and visitors. In a puzzle, you have similar types of pieces — you may have sections of blue, darker areas, border pieces, etc. As you iterate on a test, you are adding similar types of pieces to your puzzle. There comes a point in completing a puzzle where you have to connect the different sections.

Take what you learned from the home page and see how it connects with what you learned from your funnel testing. Learning across multiple campaigns is like bringing all the pieces together — it can create a much clearer picture of the whole. Look for the types of changes that have the most impact, the groups of segments that are most commonly exploitable, the major hurdles that you have to overcome, and the driving factors of success for your project. With many tests as data points, the organisation in the optimisation zone uses its store of knowledge to learn across multiple campaigns.

5.3 Deployment and Implementation

5.3.1 Adobe Target Implementation

When you implement Adobe Target Standard or Adobe Target Premium, the communication changes between your site and Adobe Target.

Adobe Target Classic uses mboxes around each area on your page. These mboxes are not required in Standard or Premium. Instead, one JavaScript library referenced on each page is all you need to implement your optimisation activities.

**Tip**
Use Adobe Dynamic Tag Manager (DTM) to easily deploy your Adobe Target tags

Adobe Target Standard updates and supplements the mbox.js with a reference to a new Adobe Target.js file. The Adobe Target.js file is hosted by
Adobe. Adobe Target.js makes it possible to edit content on any page using the Visual Experience Composer, even if the page does not contain predefined mbboxes. You must also reference this file on every page on your site. For example, you might add it to your global header.

To manage content, Adobe Target makes a call on your page. This call allows Adobe Target to deliver content, and to track visitor behaviour for use in Adobe Targeting and reporting. Traditionally, the call has been made with an mbox around a specific physical area on your page. With the updated mbox.js and Adobe Target Standard, a call is automatically made to Adobe Target from every page that references the mbox.js file. This one call made at the top of the page is all that is required for Adobe Target to deliver Adobe Target activities, track clicks, and track most success metrics. This file contains the libraries needed for all of your activities. You do not need to maintain different activity-specific versions of the file.

Mbox examples

**What Adobe Target Changes on Your Site**

Use Adobe Target to modify a visitor's experience. You can:

- Visually edit text and HTML;
- Change link destinations;
- Swap the content of an element with new content;
- Remove an element from a page (the area used by the element is collapsed);
- Hide an element on the page (the area used by the element remains as white space);
- Change the CSS class for an element;
- Track clicks on an element;
- Create goals (success metrics) for the page or for clickable elements;
- Visually simulate an activity.
5.3.1.1 Mbox Counting and Implementation

The updated mbox.js makes a call to Adobe Target on each page, which is counted as an mbox call for contractual purposes. All of these calls are rolled up under the Adobe Target-global-mbox name in the Usage report in Adobe Target Classic (Locations > Usage). Any traditional mboxes on your site continue to count as mbox calls.

Adobe Target Standard uses a modified version of the Adobe Target mbox.js file.

To use the new Adobe Target Visual Experience Editor, you must include an additional line of JavaScript as part of your mbox.js file.

To help your technical staff understand the mbox.js implementation and how it might affect your site, go to Technical Implementation Details.

5.3.2 Project Management

5.3.2.1 Setting up the Project Management Office

A Project Management Office (PMO) is a department that determines, maintains and sets the processes and standards related to project management inside an organisation. The main responsibility of a PMO is to make sure the project is aligned with corporate goals and strategies.

Some things to consider when building your PMO include:

- Availability of resources inside your organisation;
- Existing project management standards, processes and methodologies;
- Current roles and responsibilities;
- The politics and culture of your organisation;
- Project size, volume and requirements;
- Any existing project management problems.

5.3.2.1.1 Quality Management

The Quality Management Processes outlines the quality standards and processes that adopt the delivery of the project.

5.3.2.1.2 Knowledge Management

The Knowledge Management Plan contains the knowledge gained during the deployment and testing of the project of the project, ensuring it is properly organised, tracked, retained, shared and able to be re-used.
5.3.2.1.3 Typical Critical Success Factors and Risks

Success Factors

- Strong sponsorship at all levels;
- Organisational commitment and investment (team stability and availability);
- Well-defined success criteria for the project;
- Well-defined budget and KPIs;
- Well-defined change management and communication plans (people, process and product);
- Incorporation of best practices;
- Commitment to on-going training.

Risk Factors

- Project scoping not correctly defined;
- Lack of business user involvement and commitment;
- No vision (or only limited to the project itself);
- Too many specifics
  - Maintenance and/or deployment issues;
  - User adoption problems.

The following items help to ensure a successful implementation:

- A best practices document, which explains the processes in detail;
- The validation document that tests the implementation;
- A monitoring application that continuously validates the tags;
- Utilities and/or tools for comparison of page views and/or orders — those comparisons can get fairly difficult;
- A method or process to obtain the debug log for a given day, by report suite ID.

5.3.2.2 Adobe Target Project Delivery Phases

Note: These estimations are meant to provide a guide and are indicative of a standard low-complexity Adobe Target project. These estimates should not be applied for every implementation, as integration and complexity can affect duration and effort.
5.3.2.2.1 Discovery Phase

- Gather business requirements
- Define project scope/workload

**Activities**
- Functional & Technical workshops
- Mock up and POC demo
- Architectural definitions
- AEM Developer Training (customer)
- AEM Content Author Training (train-the-trainer)

**Key Participants**
- Customer Business & Product Owners
- Adobe Technical & Business Consultants
- Adobe Architects
- Adobe Trainer
- Partner Architect

**Deliverables**
- Draft architecture specification & diagram
- Initial product backlog

**Estimated Duration**
- 2-3 weeks

At the end of the design phase, the project team will be able to better accurately schedule following stages.

5.3.2.2 Build/Development Phase

- Environment setup and configuration
- Development of Templates & Components
- Configuration of Integrations

**Activities**
- Installation and setup of Dev/Test/Stage
- Setup and configuration of Development environment
- Data integration
- Baseline performance testing
- Environment Configurations
- Unit Tests & Integration tests
- Daily Developer Scrum stand-up
- Sprint Showcases to Product Owner

**Key Participants**
- Adobe Consultants
- Adobe Architects
- Customer Operations
- Partner Consultants

**Deliverables**
- System available
- Project documentation
- Test Plan
- Sprint Backlog

**Estimated Duration**
- 3-6 Months pending scope (to be confirmed after Design)
5.3.2.2.3 User Acceptance Testing (AUT) Phase

- Functional validation of templates/components
- Augments unit testing completed during Sprints

- Activities
  - End-user Training (following Train-the-Trainer)
  - Execution of business testing plan
  - Qualification of any discrepancies
  - Corrective action on priority tasks
  - "Tough Day" Performance and Scalability Testing

- Key Participants
  - Key Business Users
  - Adobe Consulting
  - Customer Developers
  - Customer Test Team

5.3.2.2.4 Production Development – RTP

- Deployment of code & content to Production

- Activities
  - Configuration Deployment
  - Sanity checks
  - Qualification of discrepancies
  - Corrective action on priority tasks

- Key Participants
  - Adobe Consultant
  - Partner Consultant
  - Customer Operations

- Estimated Duration
  - 2-4 weeks (to be confirmed after Design)

5.3.2.2.5 Final Checks

- Production platform final check

- Activities
  - Deliverability checks
  - Architecture checks
  - Training checks

- Key Participants
  - Adobe Architects
  - Customers/Resource

- Estimated Duration
  - 1 day
5.3.2.6 Go-Live

- **Release To Production - RTP**

  - **Activities**
    - DNS and related updates
    - Monitoring of environment

  - **Key Participants**
    - Customer marketing users
    - Adobe Consulting assistance
    - Adobe Support assistance

- **Deliverables**
  - Adobe/Internal Support handover

- **Estimated Duration**
  - 1-2 days

5.3.2.7 Post Go-Live

- **BAU “Business As Usual”**

  - **Activities**
    - Ongoing content authoring
    - Environment Monitoring
    - AEM Support (as required)
    - Project Close-out meeting

  - **Key Participants**
    - Customer content owners
    - Adobe Support contact
    - Adobe Customer Success Manager

  - **Deliverables**
    - Project “lessons learnt”

  - **Estimated Duration**
    - End user Training
    - Emailing ramp-up ~ 4 weeks
    - (to be confirmed after analysis)

5.3.3 Communication

5.3.3.1 Communication Plan

The Communication Plan will help you outline the approach that will be used to ensure the flow of communication among the various members of the project team, engaging the key stakeholders and any other members of the Implementation Project. The aim of this plan is to manage and coordinate communication, as well as to engage the management and stakeholders to gain their commitment to the implementation of the project.

5.3.3.2 Evangelising

Regardless of how your resources are aligned and what jobs each of them fill, every person on your testing team needs to understand the importance of evangelising. Without it, your company or business will lack the focus it needs to become a testing-centric organisation. The best test with the most impactful learning has limited value unless people know about it. Evangelising
what you learned from a test, along with monetising the value of each test, is critical to reaching the optimisation zone.

The method you use to evangelise isn’t as important as the fact that it is done. Evangelising needs to be incorporated into all meetings and documents. Whether it is a simple email or a presentation, people get excited about seeing the impact of a change.

When evangelising, remember that less is more — stick to the basics. Anything more than screenshots, lift, learning, and the monetised value of the test is probably too much. However, creativity is allowed when evangelising. For example, one company created a quiz where employees could guess which experience would win, with a fun prize for a correct guess.

The organisation that evangelises will create interest and focus on testing. This interest and focus can have other positive side effects, including the generation of additional test ideas within the company, and the addition of more resources to your team, as executives see the value of testing. Results allow you to realise what you have accomplished, focus your company’s efforts, and accelerate your ability to do more in the future. For these reasons, evangelising is mandatory in any testing organisation.

5.3.3.3 Collaboration

Unifying communication and collaboration will help you integrate silos and achieve business goals. It will enable team members and stakeholders to collaborate in real time and, as a result, improve productivity and operational effectiveness.

These are some factors that can help you in the process of building collaborative teams:

- Top-level executives can boost collaborative behaviour by investing in facilities with open floor plans to improve communication;
- Encourage senior executives to be highly collaborative;
- Invest in teaching employees how to communicate well and build relationships;
- Encourage a strong sense of community, making it easier for employees to reach out to others and share knowledge;
- Ensure that the roles of individual team members are clearly defined and the team understands the objectives and goals they have to achieve together.

5.3.3.4 DACI — For Approval Authority

We see the most successful Adobe Target projects using a DACI or similar model in their communication strategy.
DACI is used to clarify roles in a way that makes it clear who has approval authority, who needs to be consulted before a decision is made, and who needs to be informed once a decision has been made.

The role definitions are as follows:

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Driver</td>
<td>Communicating roles and responsibilities with other team members</td>
</tr>
<tr>
<td></td>
<td>Making sure these roles and responsibilities are clear.</td>
</tr>
<tr>
<td></td>
<td>Overall coordination of the project.</td>
</tr>
<tr>
<td>Approver</td>
<td>Approval or disapproval of decisions affecting progress of the project.</td>
</tr>
<tr>
<td></td>
<td>(Some approvals may still fall under the decision of the Driver.)</td>
</tr>
<tr>
<td>Contributor</td>
<td>Consultation and input to the necessary decisions.</td>
</tr>
<tr>
<td></td>
<td>(Not necessarily involved in the decision approval or disapproval.)</td>
</tr>
<tr>
<td>Informed</td>
<td>Must be informed once a decision or change is made.</td>
</tr>
<tr>
<td></td>
<td>(Does not necessarily have an approval role.)</td>
</tr>
</tbody>
</table>

5.3.4 Administration

This section contains the first steps Adobe Target administrators should take after receiving the emailed invitation to the Adobe Marketing Cloud.

5.3.4.1 Adobe Target Administrators

Preparing Adobe Target Standard for use requires the following steps:

1. Accept the Invitation
   1. Accept the invitation to the Adobe Marketing Cloud.
   2. If you do not already have an AdobeID, you are prompted to create one.
      If you do have an AdobeID, then your AdobeID is recognised and you are prompted to sign in.
   3. Accept the Terms of Use and End-User Licence Agreement (EULA).
   4. Review the summary of what you have done so far, then click Continue to Marketing Cloud.
   5. Sign in to the Adobe Marketing Cloud and click Link Account.
Note: If you do not link your account, you will not be able to access Adobe Target Standard.

All Marketing Cloud products appear on the linking page. Click Link Test&Target and enter your Test&Target username and password to access Standard and Classic.

6. Click Continue to Marketing Cloud.
   At this point, you do not yet have any groups set up with entitlements for you to link.

7. If desired, watch the video introducing you to the Adobe Marketing Cloud.

8. To see your new privileges and access the product, sign out of Adobe Marketing Cloud, then sign back in.

2. Assign Yourself the Approver Role

After accepting the invitation to join the Adobe Marketing Cloud and logging in, confirm that Standard has been added to your Marketing Cloud account, then assign yourself the Approver role in Adobe Target Standard.

   1. After you log in to the Adobe Marketing Cloud, click Adobe Target.
      The Adobe Target Standard card appears. This confirms that you have added Standard to your Marketing Cloud account. At this time, you are not able to create an activity because you have not been given the Approver role.

   2. Click the Adobe Target Standard card, then in Standard click Setup > Users.
      Your name appears in the users list.

   3. Click the Approver radio button.
      Now that you are an Approver, you can create and edit activities, audiences, and content. You are also able to approve activities.

3. User Management

Users are managed in the Adobe Marketing Cloud User Management interface. In addition, some additional user roles and permissions can be managed in Adobe Target Standard.

Only Adobe Marketing Cloud Admin users can manage users. The Admin role is assigned at the Marketing Cloud level. Marketing Cloud roles are separate from the roles managed in each solution.

Users can be managed across all products throughout the entire Adobe Marketing Cloud. To manage users for the entire Adobe Marketing Cloud, click Adobe Marketing Cloud > Tools > User Management. Additional
Adobe Target-specific user management is performed within the Adobe Target interface.

Only Marketing Cloud Admins can set user roles in Adobe Testing and Adobe Targeting Standard. For example, a Standard Approver user cannot change an Observer to an Approver, without also having Marketing Cloud Admin rights.

Admin users must add users to the system. Users are not automatically added. They are invited by email and must confirm their email addresses before their accounts are registered.

5.3.4.2 Roles in Adobe Target

Once users are registered with the system, the Admin user can set them up in Standard. In the Standard interface, click **Setup > Users**, then assign one of the following roles to each user:

- **Observer (default)**
  Can view activities, but cannot create or edit them.

- **Editor**
  Can create and edit activities before they are live, but cannot approve the launch of an activity.

- **Approver**
  Can create, edit, and activate or stop activities.

By default all Adobe Target users start with Observer permissions.
5.3.5 Workflows

5.3.5.1 Testing Process Flow

**Tasks**

- Define campaign test (Bl/Ar/Ti)
- Define creative requirements (Bl)
- Define Adobe Targeting profiles (Bl/Ar)
- Define test conversion metric (Bl/Ar)
- Define campaign success (Bl/Ar)
- Define learning’s if the test fails (Bl/Ar)
- Define reporting segments (Bl/Ar)
- Define technical requirements (Ti)
- Define creative requirements (De)
- Develop required creative (De)
- Develop required code (Ti)
- Implement code on existing pages (Ti)
- Upload new page templates (Ti)
- Develop required Mbox names (An)
- Create offers in Adobe Target (An)
- Create campaign (An)
- Define testing parameters in campaign (An)
- Create experiences (An)
- Define the conversion metrics (An)
- Create the reporting segments (An)
- Preview campaign conversion in dev or pre-prod (An)
- Copy dev test to new test for launch (An)
- Deactivate old test (An)
- Define creative requirements (Bl)
- Define creative requirements (An)
- Define creative requirements (Bl)
- Define Adobe Targeting profiles (Bl)
- Define test conversion metric (Bl)
- Define campaign success (Bl)
- Define Adobe Targeting profiles (Bl)
- Define test conversion metric (Bl)

**Idea Generation**

- Planning & Priorisation
  - Business Lead: Drives Optimisation Strategy
  - Develops testing plan and priorities

- Requirements
  - Business Lead: Approves tests for implementation and execution
  - Technical Lead: Provides input on implementation requirements for test plan
  - Business Lead: Approves technical requirements
  - Design: Provides analysis and recommendations for testing prioritisation

- Implementation & Content Creation
  - Analyst: Provides required Mbox names
  - Designer: Creates offer content

- Execute
  - Analyst: Provides required Mbox names
  - Technical Lead: Provides technical requirements

- Approval
  - Business Lead: Summarises and report results to team
  - Closes campaigns
  - Deactivates unused Mboxes

- Optimise
  - Business Lead: Records findings in knowledge base
  - Technical Lead: Provides final approval from tech perspective (incl. content integrity)

  - Business Lead: Publishes results and findings to business
  - Identifies optimisations changes for prioritisation
5.3.5.2 Stages of the Personalisation Journey

Some marketers execute and prefer a hands-off personalisation strategy and are comfortable using technology to drive personalisation, especially when they can ensure that it is still meeting marketing goals. This is where automated personalisation and behavioural Adobe Targeting fits in. You can use Adobe Target to automate your site personalisation fully or in combination with other strategies. You can trust the machine, but still maintain control to monitor and tweak the level of automation versus human decision-making to ensure your automated personalisation is making a positive impact.

Automated personalisation works most effectively on sites with high volumes of traffic and distinct offer sets, such as news content or product categories.

“Automation increases the average conversion rate from 2.6 per cent to 3.6 per cent.” Adobe 2014 Digital Marketing Optimisation Survey.

The figure below outlines the testing stages followed to become an optimisation organisation.

<table>
<thead>
<tr>
<th>Creative testing</th>
<th>Integrated marketing</th>
<th>Segmented messaging</th>
<th>Site experience personalisation</th>
<th>Behavioural profile sharing</th>
<th>360-degree optimisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Testing and optimisation of multiple creative or experiences A/B and multivariate testing</td>
<td>Create Adobe Targeted landing pages based on source campaigns</td>
<td>Determine audience segments and create custom messaging and creative; Identify optimal media mix for Adobe Target audiences</td>
<td>Adobe Target beyond ads and landing pages to the site experiences Personalised marketing based on site behaviors</td>
<td>Share profile data across channels for enhanced Adobe Targeting; Cross-channel creative and experience; Adobe Targeting based on shared profiles</td>
<td>Personalised messaging optimisation across channels (digital, branch, IVR, etc.)</td>
</tr>
</tbody>
</table>

5.3.5.3 Optimisation
Online optimisation is becoming increasingly important to the success of organisations. However, few have implemented a truly effective long-term testing program. Generally, they lack sufficient resources (IT, marketing, product management), and a proven strategy to go about prioritising what should be tested and how to test it.

- One defined success metric;
- Weekly meetings;
- Quarterly optimisation review;
- Cross-functional team;
- Shared space for documents;
- Email notifications;
- Roadmap;
- Program tracking document;
- Campaign and Adobe Targeting visibility document;
- Clear process document;
- Brainstorm sessions;
- Testing based on defined business goals;

5.3.5.3.1 Roles and Responsibilities for Optimisation

When building an optimisation organisation, the following three roles help make the organisation a success.

<table>
<thead>
<tr>
<th>Executive Sponsor</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Role:</strong></td>
</tr>
<tr>
<td>• A senior executive vested in improving online metrics who holds the core team accountable for business goals.</td>
</tr>
<tr>
<td>• This testing champion allocates his/her budget, time, and personnel to create an organisation with a culture focused on optimising its website, email, and display advertisements.</td>
</tr>
<tr>
<td><strong>Asks:</strong></td>
</tr>
<tr>
<td>• Creates organisational efficiencies by identifying and removing internal obstacles.</td>
</tr>
<tr>
<td>• Evangelises a testing culture within the organisation and obtains buy-in.</td>
</tr>
<tr>
<td>• Aids in testing prioritisation through Steering Committees.</td>
</tr>
<tr>
<td>• Drives internal adoption of Adobe Target.</td>
</tr>
<tr>
<td>• Resolves internal escalation issues.</td>
</tr>
<tr>
<td>• Responsible for overall program success.</td>
</tr>
<tr>
<td><strong>Risks:</strong></td>
</tr>
</tbody>
</table>
| • Without an Executive Sponsor, internal teams will not be empowered to build a
sustainable testing program.
- Insufficient resources or prioritisation will hinder the ability to deliver value.

### Optimisation Manager

**Role:**
- Owner of the optimisation program vested in achieving business goals through online testing.
- Decides what to test as well as what constitutes success.
- (Often this person is a product manager, web analyst or marketing manager.)
- Drives testing strategy, maintains optimisation roadmap, and possibly leads the Steering Committee.

**Asks:**
- Prioritises testing ideas.
- Coordinates with design lead to create designs and messaging.
- Schedules regular status and discovery meetings with internal testing team, stakeholders, and subject-matter experts.
- Reports testing progress and results to executive sponsor for distribution.
- Escalates irresolvable issues to Executive Sponsor.

**Risks:**
- Without this key person, an organisation will be haphazard in its approach to testing.
- Projects would be poorly managed.
- Testing activity and results will be unpredictable.
- Campaign launch windows will at risk.

### Power User

**Role:**
- Specialist who executes campaigns within the Adobe Target platform.

**Asks:**
- Creates campaigns in Adobe Target with occasional assistance from Adobe consultants.
- Ensures that quality assurance (QA) process is completed.
- Responsible for defining QA.
- Executes tests against campaign roadmap.
- Analyses and interprets the data from the reports.

**Risks:**
- Without a well-trained power user, campaign execution will be disorganised with lots of last-minute QA, execution challenges and re-works.

**Designer**

**Role:**
- Creative resource who determines the design layout and message

**Asks:**
- Creates digital assets such as alternate designs, graphics, etc. for testing that meet the company’s brand guidelines.
- Delivers approved digital assets within project timeline for campaign launches.

**Risks:**
- Campaign launch dates are at risk if creative alternatives are not available.

**Developer**

**Role:**
- Technical resource versed in JavaScript, CSS and HTML who will evaluate the technical needs for campaign implementation.

**Asks:**
- Delivers content for Adobe Target offers.
- Places Adobe Target code on the company’s website.
- Recommends technical solutions for creating campaigns.
- Oversees QA testing.

**Risks:**
- Poorly developed page content puts campaign, quality assurance, and launch of campaigns at risk.

**Project Manager**
Role:

- Stakeholder who has a vested interested in scheduling, tracking, and reporting on campaigns of the optimisation program.

Asks:

- Maintains master list of prioritisation projects.
- Tracks the lifecycle of each campaign.
- Identifies and secures the necessary resources.
- Keeps campaigns on track and manages scope creep.

Risks:

- Without a project manager, campaigns may not be efficiently executed from start to finish.

5.3.5.3.2 Execution Approach

Here is an example of an end-to-end best in class digital approach.

5.3.5.3.3 Optimisation Framework

Test construction and prioritisation are the most important steps in the optimisation process, and need to run in parallel with the above execution plan.
5.3.5.3.4 Agile Approach to Optimisation

The optimisation process lends itself to an agile way of working — Running an optimisation program involves many stakeholders across the business and in most cases is managed across a virtual team. For this reason tests can be easily delayed by other competing priorities.

- Daily stand-ups;
- Fortnightly prioritization;
- Fortnightly sponsor updates;
- Monthly stakeholder communication broadcasts;

For this approach to work:

- Management must endorse the approach;
- Agile training must be provided for team members, and a scrum master appointed.

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Plan and prioritise</th>
<th>Requirem ents</th>
<th>Create content and build</th>
<th>Execute</th>
<th>Approval</th>
<th>Report, analyse and record</th>
<th>Optimise</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define test use case</td>
<td>Creative Requirement s</td>
<td>Creative assets</td>
<td>Create Adobe Target offers</td>
<td>Technical approval</td>
<td>Report results</td>
<td>Publish quick wins</td>
<td>Actions for business</td>
<td></td>
</tr>
<tr>
<td>Adobe Targeting profiles Test</td>
<td>Assemble test</td>
<td>Create campaign</td>
<td>Business approval</td>
<td>Deactivate campaign</td>
<td>Deactivate mbox</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test</td>
<td>QA test</td>
<td>Define parameters in test</td>
<td>Launch test</td>
<td>Deactivate mbox</td>
<td>Optimize Status</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### 5.3.5.4 Steps to establish a Testing & Optimisation Organisation

<table>
<thead>
<tr>
<th>Steps to establish a Testing &amp; Optimisation Organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Governance and Leadership</strong></td>
</tr>
<tr>
<td>- Sponsor</td>
</tr>
<tr>
<td>- Commitment</td>
</tr>
<tr>
<td>- Clear Roles &amp; Mandate</td>
</tr>
<tr>
<td><strong>Strategy</strong></td>
</tr>
<tr>
<td>- Business KPIs measured</td>
</tr>
<tr>
<td>- Optimisation strategy</td>
</tr>
<tr>
<td><strong>People</strong></td>
</tr>
<tr>
<td>- Dedicated team</td>
</tr>
<tr>
<td>- Skilled resources</td>
</tr>
<tr>
<td><strong>Process</strong></td>
</tr>
<tr>
<td>- Target enabled</td>
</tr>
<tr>
<td>- Go to market defined</td>
</tr>
<tr>
<td>- Agile program rhythm</td>
</tr>
<tr>
<td>- Stakeholders support</td>
</tr>
<tr>
<td>- Analytic Insights</td>
</tr>
<tr>
<td>- Test ideas &amp; creative execution</td>
</tr>
<tr>
<td><strong>Launch</strong></td>
</tr>
<tr>
<td>- Business controlled</td>
</tr>
<tr>
<td>- Communications</td>
</tr>
<tr>
<td>- Promote to production</td>
</tr>
<tr>
<td>- Document learnings</td>
</tr>
</tbody>
</table>
“Top-converting companies are 43 per cent more likely to use a variety of targeting techniques.” Adobe 2014 Digital Marketing Optimisation Survey.

5.4 Usage

Once Adobe Target is in place, how your company uses the tool becomes important because it will help you maximise your investment. Usage is all about establishing and leveraging best practices that will help you with your overall reporting, analysis and decision-making. Here are a few questions you will need to consider:

- How will you manage time and resources spent on reporting and deep-dive analysis?
- If your analysts are going to be overloaded with reporting and analysis requests each week, what tools and workflows do you need to implement to help them prioritise those requests?

For routine reports and business questions, it may be helpful to agree on the best approach to ensure numbers match up properly, regardless of who is building the report or performing the analysis.

5.5 Sustainability

Sustainability focuses on having the right structure and measures in place to support or sustain Adobe Target post-implementation. These processes ensure that your content delivery agility and optimisation initiatives do not go off course in six to twelve months. Some examples of sustainability practices include documenting each deployment for future reference, establishing and enforcing corporate standards, creating a centralised knowledge base of metrics and reports and scheduling periodic implementation reviews.

To keep up with the latest updates and releases in Adobe Target, go to Documentation Updates.

5.6 Change Management
Change management is about managing the people side of change. In order for this to happen, leaders, employees, and partners may need to adjust existing attitudes and behaviours.

The change management mission:

- Ensure documentation of all proposed changes;
- Ensure verification of technical completeness;
- Ensure timing of change executions does not conflict;
- Ensure appropriate management involvement and approval (sign-offs, approvals, deferrals);
- Ensure the verification of successful testing to the degree required by organisation standards before change introduction;
- Ensure documentation of actual change (enable communication of change results, provide a history of changes, support the maintenance of systems documentation).

Change management guidelines:

- Monitor all changes;
- Formal change management system must be in place;
- Define the change management life-cycle functions;

6 Product

6.1 Adobe Target Architecture

6.1.1 A/B Test

An A/B test compares the results of two or more experiences using data collected by Adobe Target.

An A/B test compares two or more versions of your website content to see which best lifts your conversions, sales, or registrations. Use an A/B test to compare changes to your page against your default page design to determine which experiences produce the best results. This helps you determine whether changes to your page provide improved results.

A/B tests are well-suited for large changes that might involve new layouts or drastically different treatments of the elements. If your test design does not easily break down into individual page elements, you should run an A/B test before a Multivariate test. Also, if you anticipate large interactions between elements, an A/B test is the best choice.

When you set up your test, you can determine what percentage of visitors see each experience.
For example, you might split traffic evenly between the control and a second experience, to learn which experience best helps you meet your advertising campaign objectives.

When the number of different experiences exceeds five and spans two or more locations, it’s a good idea to consider a Multivariate test (MVT) before running your A/B tests.

The multivariate test shows which areas on the page are most likely to improve conversion. These are the locations that a marketer should focus on. For example, the MVT test might show that the call to action is the most important location for meeting your goals. Once you have determined which locations and content are most useful for helping you meet your goals, you can run an A/B test to refine the results — for example, to test two specific images against each other, or compare the wording or colours of a call to action. By following an MVT test with one or more A/B tests, you can determine the best possible content for the results you desire.

### 6.1.1.1 Planning an A/B Test

A successful A/B test requires an adequate number of visitors.

The Adobe Target Sample Size Calculator helps you determine the sample size needed for a successful test.

Before setting up your A/B test, use the sample size calculator. Download [here](#).

It is important to determine an adequate sample size (number of visitors) prior to doing any A/B test, in order to establish the time that the test should be allowed to run before evaluating the results. Simply monitoring the test until statistical significance is achieved causes the confidence interval to be vastly underestimated, making the test unreliable. The intuition behind this result is that, in the event a statistically significant result is detected, the test is stopped and a winner is declared. However, if the result is not statistically significant the test is allowed to continue. This procedure strongly favours the positive outcome, which increases the false positive rate, and so distorts the effective significance level of the test.

This can result in a large number of false positives, which leads to implementation of offers that do not deliver the predicted lift in the long run. Poor lift itself is a dissatisfying outcome, but an even more serious consequence is that over time the inability to predict lift accurately erodes organisational trust in testing as a practice.

Calculating the sample size using the spreadsheet calculator before any A/B test begins ensures that you always run high-quality A/B tests that comply with statistical standards.
There are five user-defined parameters that define an A/B test. These parameters are linked, so that when four of them are established, the fifth can be calculated:

1. **Statistical significance**

The significance level of a test determines how likely it is that the test reports a significant difference in conversion rates between two different offers when in fact there is no real difference. This is known as a false positive or a Type I error. The significance level is a threshold specified by the user and is a trade-off between the tolerance for false positives and the number of visitors that have to be included in the test.

In an A/B test, it is initially assumed that both offers have the same conversion rate. Then the probability of the observed outcome is computed based on this assumption. If this probability (the p-value) is smaller than some predefined threshold (the significance level), Adobe Target concludes that the initial assumption — that both offers have the same conversion rate — is incorrect and, therefore, the conversion rates of A and B are statistically different at the given significance level.

A commonly used significance level in A/B testing is five per cent, which corresponds to a confidence level of 95 per cent (the confidence level is calculated as 100 per cent minus the significance level). A confidence level of 95 per cent means that every time you do a test, there is a 5 per cent chance of detecting a statistically significant lift even if there is no difference between the offers.

Typical interpretations of the confidence level are summarised in the table below:

<table>
<thead>
<tr>
<th>Confidence Level</th>
<th>Interpretation</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 90 per cent</td>
<td>No evidence that there is a difference between the conversion rates</td>
</tr>
<tr>
<td>90-95 per cent</td>
<td>Weak evidence that there is a difference between the conversion rates</td>
</tr>
<tr>
<td>95-99 per cent</td>
<td>Moderate evidence that there is a difference between the conversion rates</td>
</tr>
<tr>
<td>99-99.9 per cent</td>
<td>Strong evidence that there is a difference between the conversion rates</td>
</tr>
<tr>
<td>&gt; 99.9 per cent</td>
<td>Very strong evidence that there is a difference between the conversion rates</td>
</tr>
</tbody>
</table>

It is recommended to always using a confidence level of 95 per cent or above.

It is desirable to use the highest possible confidence level, so that the test will yield few false positives. However, a higher confidence level requires a larger number of visitors, which
increases the time required to do the test. Furthermore, an increase in the confidence level causes a decrease in the statistical power.

2. Statistical power

The statistical power of an A/B test is the probability of detecting a real difference in conversion rate of a certain magnitude. Because of the random (stochastic) nature of conversion events it is possible that a statistically significant difference is not observed — just by chance — even though there is a real difference in conversion rate between the two offers. This is called a false negative or a Type II error.

The statistical power is often ignored because the determination of statistical power, in contrast to statistical significance, is not required to do an A/B test. However, by ignoring the statistical power there is a substantial chance that real differences between the conversion rates of different offers will not be detected by the test because the sample size is too small. This results in the tests being dominated by false positives.

It is desirable to have high statistical power so that the test has a high chance of identifying a real difference in conversion rates and yields fewer false negatives. However, a larger number of visitors is required to increase the statistical power of detecting any given lift, which increases the time required to do the test.

A commonly used value for statistical power is 80 per cent, which means that the test has an 80 per cent chance of detecting a difference equal to the minimum reliably detectable lift. The test has a lower probability of detecting smaller lifts and a higher probability of detecting larger lifts.

3. Minimum reliably detectable lift

Most organisations want to measure the smallest possible difference in conversion rate, because even a small lift is worth implementing. However, if you want the A/B test to have a high probability of detecting a very small lift, the number of visitors that must be included in the test would be prohibitively large. The reason for this is that, if the difference in conversion rate is small, both conversion rates must be estimated with high accuracy to identify the difference — which requires a large number of visitors. Therefore, the minimum reliably detectable lift should be determined by the business requirements, considering the trade-offs between detecting small lifts and running the test for longer periods of time.

For example, suppose that two offers (A and B) have true conversion rates of 10 per cent and 15 per cent, respectively. If these offers are shown to 100 visitors each, there is a 95 per cent chance of observing conversion rates in the range 4 per cent to 16 per cent for offer A and 8 per cent to 22 per cent for offer B due to the stochastic nature of conversions. These ranges are known as confidence intervals in statistics. They represent the confidence in the accuracy of the estimated conversion rates. The larger the sample size (more visitors) the more confident you can be that the estimates of the conversion rates are accurate.

The figure below shows these probability distributions.
Because of the large overlap between the two ranges, the test cannot determine whether the conversion rates are different. Therefore, this test with 100 visitors cannot distinguish between the two offers. However, if we expose the offers to 5000 visitors each, then there is a 95 per cent chance that the observed conversion rates will fall in the ranges of 9 per cent to 11 per cent and 14 per cent to 16 per cent, respectively.

In this case, it is very unlikely that the test will come to a wrong conclusion, so the test with 5000 visitors can distinguish between the two offers. The test with 5000 visitors has a confidence interval of approximately +/-1 per cent. This means the test can detect differences of about one per cent. Therefore, even more visitors would be needed if the true conversion rates of the offers were, for example, 10 per cent and 10.5 per cent instead of 10 per cent and 15 per cent.

4. Baseline conversion rate
The baseline conversion rate is the conversion rate of the control offer (offer A). Often, you have a good sense of the conversion level for the offer based on prior experience. If that is not the case — for example because it is a new type of offer or creative — the test can be allowed to run for a day or so to get a rough estimate of the baseline conversion rate that can be used in the sample size calculation.

5. Number of visitors

It can be difficult to balance the opportunity costs of running a test for a long time with the risk of false positives and false negatives. Obviously, you do not want to make the wrong decisions, but being paralysed by too strict or rigid testing standards is not desirable either. As a general guideline, a 95 per cent confidence level and an 80 per cent statistical power are recommended.

Adobe’s sample size spreadsheet asks you to decide on the statistical significance and the statistical power. After entering the baseline conversion rate and the daily traffic across all offers, the spreadsheet outputs the number of visitors required for detecting a lift of 1 per cent, 2 per cent, 5 per cent, 10 per cent, 15 per cent, and 20 per cent, with a probability equal to the specified power of the test. The spreadsheet also allows the user to input a custom minimum reliably detectable lift. Furthermore, the spreadsheet outputs the number of weeks required for the test based on the traffic level entered by the user. The required number of weeks is rounded up to the nearest whole week in order to avoid day-of-week effects influencing the results.

There is a trade-off between the minimum lift that can be reliably identified by the test and the required number of visitors. The figure below, which is valid for a baseline (control) conversion rate of five per cent, shows strong diminishing returns for increasing the number of visitors. The minimum lift that can be reliably detected improves tremendously when adding the first few visitors to the test, but it takes an increasingly larger number of visitors to improve the test. The figure helps in finding an adequate tradeoff between the time required to run the test (as determined by the number of visitors required and the site traffic) and the minimum lift that can be reliably detected by the test.

For an A/B test, the statistical significance, statistical power, minimum reliably detectable lift, and baseline conversion rate are set by the analyst and then the required number of visitors is calculated from these numbers. This article discusses these elements and gives guidelines for how to determine these for a specific test.
The figure below illustrates the four possible outcomes of an A/B test:

<table>
<thead>
<tr>
<th>Test Positive</th>
<th>No Real Lift</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Real Lift</strong></td>
<td><strong>No Real Lift</strong></td>
</tr>
<tr>
<td>True Positive</td>
<td>False Positive (Controlled by the Significance Level)</td>
</tr>
<tr>
<td>False Negative (Controlled by the Power Level)</td>
<td>True Negative</td>
</tr>
</tbody>
</table>

It is desirable to get no false positives or false negatives. However, this can never be guaranteed by a statistical test. It is always possible that observed trends are not representative of the underlying conversion rates. For example, in a test to see if heads or tails on a coin flip was more likely, even with a fair coin, you could get ten heads on ten tosses, just by chance. The statistical significance and power help us quantify the false positive and false negative rates and allow us to keep them at reasonable levels for a given test.

### 6.1.1.2 Testing Best Practices

**Effectiveness**

- Big changes produce big results
  - Focus on dramatically changing what the user experiences on a page/flow.
- Test length
  - The bigger the change, the more drastic the signal from the test, which means the faster we’ll reach statistical confidence and can move onto the next test.
- Site variance
  - All sites have noise — variance in conversion rates and order values can be an effect of factors in and out of your control.
  - Having a change produce a lift in performance above the natural site variance is critical in our tests being successful and able to reach confidence.
• Identify meaningful success metrics
  o Track conversions/revenue/margin per visitor.
  o A secondary success metric of moving people further down the funnel is also important.
  o Avoid metrics which aren’t directly linked with purchases (such as clicks).
  o Add in other metrics specific to certain tests as needed.

Efficiency

• Quantity not quality
  o Testing is searching for signal and areas for opportunity, not just finding the perfect creative execution
    ▪ Things don’t need to be perfect. Remember that we’re looking for signal more than anything — once we find an area where we can make a difference, then we can focus our attention on that individual piece of the site.
  o Start simple, and then expand from there
    o A major pothole for most organisations is in the development timelines that some tests have — avoid these at all costs.

6.1.2 Advertising Testing

Ad testing lets you extend the scope of testing to third-party affiliate sites, so that you can test the performance of content such as banner ads, measuring their impact on conversion as they draw users to your site.

You can test the content that you serve into a third-party site, and can tie that content to an experience on your site. Ad testing allows you to populate an offsite mbox, called an adbox. You can associate that adbox with any other mbox by placing them in a single experience. For example, a visitor may see an ad for a discount on price promotion on another site, and when they click on it and arrive to your landing page, they’ll see an mbox that continues the messaging. Using ad testing lets you combine adboxes and mbboxes in the same experience to create an experience that spans across your site and other sites.
6.1.3 Automated Personalisation

Automated personalisation is available as part of the Adobe Target Premium solution. It is not included in Adobe Target Standard without an Adobe Target Premium license.

Marketers implement one file on their site and that enables them to point and click on any content and then visually create and select additional content options for that area. Then, the modeling system automatically determines which piece of content to deliver to each individual based on all behavioural data the system has about the visitor. This provides a personalised experience for each visitor. The marketer does not need to run a test, then analyse the results, then deliver a winner before realising the lift found from optimisation.

Automated personalisation provides:

- Two machine-learning algorithms:
  - Random Forest
  - Residual Variance Model
- Single line of code implementation with WYSIWYG content editing.
- Connection to Marketing Cloud Audiences for seamless collection of advance visitor behavioural data
- For information about using Marketing Cloud Audiences with Adobe Target, see Marketing Cloud Audiences in the Adobe Target Integration guide.

6.1.4 Multivariate Test

A full factorial multivariate test compares all possible combinations of offers in the elements on your page to help you determine the best possible combination of content. Multivariate tests (MVT) also show which element most contributes to campaign success.

One advantage a Multivariate test provides compared to an A/B test is the ability to show you which elements on your page have the greatest influence on conversion. This is also known as the “main effect”. This information is useful, for example, by helping you determine where to place content that you want to receive the most attention.

Multivariate tests also help you find compound effects between two or more elements on a page. For example, a particular ad might produce more conversions when combined with a certain banner or hero image. This is also known as the “interaction effect”.

Adobe Target uses full-factorial Multivariate tests to help you optimise your content. A full-factorial Multivariate test compares all of the possible combinations of content with equal probability. For example, if you have two page elements with three offers each, there are nine possible combinations (3x3). Three elements, with two containing three possible offers and one with two offers, provide 18 options (3x3x2).
In Adobe Target, each combination is one experience. The Multivariate test compares each experience so you can learn which combinations are the most successful. At the same time, data is collected and analysed to understand how each location and offer influences the success metric.

Because of the number of combinations that can be generated, a Multivariate test requires more time and traffic than an A/B test. The page must receive enough traffic to produce statistically significant results for each experience. To obtain useful results, you need to understand the amount of traffic your page receives and test the optimal number of combinations for the right amount of time to get the required results. Adobe Target's Traffic Estimator can help you design a test that works with your traffic. Before you use the Traffic Estimator, you should have good statistics showing the number of impressions and conversions your site normally receives. Consider your traffic levels per day. The more experiences in an activity, the more traffic the activity will need to include or the longer your activity will need to run. If your traffic isn’t very high, you should test a small number of combinations; otherwise, the amount of time required to produce meaningful test results might be too long to be useful.

**When to Use MVT vs A/B**

Multivariate tests can be used together with A/B tests to optimise your page. Examples of when you might want to use them together include:

- **Use an A/B test to optimise your page layout, followed by a Multivariate test to determine the best content in each element on the page.**

  An A/B test can provide important feedback on the layout, and Multivariate tests excel at testing the content within the elements in your page design. Running an A/B test on the layout before testing multiple content options can help you determine the best layout and the most impactful content.

- **Use a Multivariate test to determine which element is the most important, then follow up with a more focused A/B test on that element.**
When the number of different experiences exceeds five and spans two or more elements, it’s a good idea to consider an MVT test before running your A/B tests.

Considerations:

- Use an MVT when you have at least three elements to test. If you have fewer, run a series of A/B tests.
- Select the page elements you believe will have the strongest impact on the results.
- Don’t include too many elements or locations in a test. The larger the number, the longer the test duration will be.
- Plan the test design in advance. It’s not advisable to edit a test once it goes live and data starts being collected and analysed.
- It is recommended that elements be independent of each other. For example, do not test your layout and content in the same test.
- Plan additional time for QA because of the increase in the number of experiences. Full factorial Multivariate tests likely include more experiences than A/B tests, depending on the number of variations.

For more considerations and best practices, see [Multivariate Test Best Practices](#).

### 6.1.5 Recommendations

Recommendations is available as part of the Adobe Target Premium solution. It is not included in Adobe Target Standard without an Adobe Target Premium license.

Recommendations activities automatically display products or content that might interest your customers based on previous user activity. Recommendations help direct customers to relevant items they might otherwise not know about.

Recommendations helps you:

- Create sophisticated criteria (rules) to automate recommendations;
- Automatically display the recommendations by using a few JavaScript snippets;
- Test and optimise the recommendations criteria and designs that display the recommendations;
- Report on the results of your recommendations activity.
A recommendation determines how a product is suggested to a customer, depending on that customer’s activities on the site. For example:

- Encourage people who purchase a backpack to consider buying hiking shoes and trekking poles.
  Create a recommendation that shows items that are often purchased together, using the “People who bought this also bought that” criterion.
- Increase the time visitors spend on your media site by recommending similar video to the one they are watching.
  Create a recommendation that suggests other videos, using the “People who viewed this viewed that” criterion.
- Suggest that customers who viewed information about savings plans at your bank also read about IRA accounts.
  Show other products people purchased after viewing one product without showing the first product in the recommendations, using the “People who viewed this also bought” criterion.

For more information about these and other Recommendations criteria, see Criteria.

Recommendations Classic vs Recommendations Activity in Adobe Target

In the Classic Recommendations product, recommendations were displayed by creating a data collection mbox on a page, then adding a display mbox in a specific page location. The Recommendations activity in Adobe Target Premium allows you to create your recommendations anywhere on the page without the need to create an mbox for each location where you want to recommend products or content. A simple JavaScript reference in the header of the page enables Recommendations anywhere on the page. You can also use JavaScript to set up keys, products, and other information on each page.

Recommendations Classic appears as its own card in the Marketing Cloud UI. A Recommendations activity is available from with the Adobe Target Premium workflow.

The Recommendations activity in Adobe Target improves on Recommendations Classic in the following main areas:

Criteria
Adobe Target Recommendations includes a criteria library containing prepackaged sets of rules and configurations. In Recommendations Classic, each recommendation was built manually by filling out a form and choosing from the large list of rules. Now, when creating a Recommendations activity, you simply choose a preconfigured criteria set. You can still create custom recommendations, but the criteria library contains many of the most common configurations, prebuilt to simplify the process, and using language that people understand. These prepackaged criteria can be used as is, or they can be copied and edited to fit your specific needs.

Criteria are preconfigured and sorted by industry verticals, page types, and implementation. For example, you can look for the criteria that apply to the retail vertical, for use on a product page, showing products from within a particular category (as defined by the entity.categoryID parameter).

For more information about using and creating criteria, see Criteria.

Visual Preview

You can visually preview your recommendations after you set them up and make any necessary changes without having to create them on the page then go out and test them. Previews are available from within Adobe Target.

Adobe Targeting

In Recommendations Classic, there were six Adobe Targeting options. Recommendations activities use Adobe Target's full range of Adobe Targeting options. Define an audience using either Adobe Target or other Adobe Marketing Cloud Audiences (such as Adobe Audience Manager and Adobe Analytics), then select the percentage of activity entrants who see each design, and the percentages who see the control.
Reporting

In Adobe Target, Recommendations provides improved reporting that takes advantage of the capabilities provided by Adobe Target and the Marketing Cloud. Rather than simply showing the lift provided by recommendations compared to the results without them, you can view complete information about your Recommendations activity.

6.1.6 Reports

Reports provide information about the performance of your activities.

To open a report, select an activity, click the Activity Details icon, and then select the Reports tab. You can configure report settings by clicking the Settings gear icon. Choose the audience and the date limits for the report.
Each report includes a legend to help you understand the report chart.

The heading above a report shows the following:

- The activity status, including the date range when the activity ran;
- The projected winning experience;
- The estimated revenue for the winning experience, if 100 per cent of your audience were to see the winning experience.

### Report Date Restrictions

Reports have the following date restrictions:

- Start date of the report must be within the last two years;
- Daily reports are limited to 100 days;
- Hourly reports are limited to 15 days.

These limits do not apply to Automated Personalisation.

### 6.1.7 Audiences

Audiences determine who will see an Adobe Targeted activity.

Audiences created or updated in Adobe Target Standard are also available in Adobe Target Classic, and vice versa. Segments created in Adobe Target Classic appear in the Audience list in Standard and can be used for your activities. Those audiences are read-only and cannot be edited. Segments are synchronised to the Audiences list in 30-minute intervals, so it might take a few minutes for your segments to appear in the Audiences list.

Audiences created in Adobe Audience Manager and shared with Adobe Target Classic are also available in Adobe Target Standard without any action from users.

A variety of audiences are available with Adobe Target. The following table lists the audiences provided with Adobe Target Standard.

<table>
<thead>
<tr>
<th>Audience type</th>
<th>Audiences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browser</td>
<td>You can Adobe Target users who use a specific browser when they visit your page.</td>
</tr>
<tr>
<td>Device</td>
<td>You can Adobe Target visitors coming from different devices.</td>
</tr>
<tr>
<td>--------</td>
<td>-------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Geo    | Adobe Target users based on their geographical location. This option is only available for accounts configured with the geo option. Contact your Adobe Customer Success Manager for details. Geo location parameters allow you to Adobe Target campaigns and experiences based on your visitors’ geography. You can include or exclude visitors based on their country, state/province, city, DMA, or zip/postal code. This data is sent with each mbox request and is based on the visitor's IP address. Select these parameters just like any Adobe Targeting values. The vast majority of mobile device users access content via WiFi, which means Adobe Target’s IP-based geo-Adobe Targeting is as accurate as on a desktop. Mobile tower-based connections may be less accurate because the visitor’s IP address is based on the tower where the signal is being picked up. Some mobile geolocation issues can be solved using the HTML 5 Geo location API. You can Adobe Target based on one or more of the following geographical units:  
  - Country  
  - State  
  - City  
  - Zip Code  
  - DMA  
  - Latitude  
  - Longitude  

A visitor's IP address is passed with an mbox request, once per visit (session), to resolve geo Adobe Targeting parameters for that visitor. For a reference of available locations and spelling, see in these csv files:  
  - City codes  
  - Region codes  
  - Country codes  
  - Metro codes  

**Note:** Use the Metro codes csv file to Adobe Target by DMA. Use the location spellings listed in the METRO_NAME column of the csv file. |
| Mobile | Adobe Target mobile devices based on parameters such as mobile device, type of device, device vendor, screen dimensions (by pixels), and more. For example, you might want to show different content to users who enter your page from a phone than you would if they visit from a computer. In that case, you could select the Mobile audience, then select the **Is Mobile Phone** option, then add any specific details that are important to you, such as the type of phone, size of the screen (in pixels), and so on. You can choose more than one mobile device parameter. Multiple selections are joined with an OR. |
| Operating System | You can Adobe Target visitors who use a certain operating system. |
| Referrer | You can Adobe Target users who are referred to your site by a specific search engine. |
You can Adobe Target either new or returning visitors, or include all users.

- All Visitors
- New Visitors
- Returning Visitors

In addition, you can create audiences using audience rules and use audiences (segments) created in Adobe Target Classic.

You can also Adobe Target custom profile parameters and user. parameters. When adding an audience, click Visitor Profile, then under Custom User Parameters or Custom Profile Parameters in the Visitor Profile dropdown list, choose the parameter you use want to use to Adobe Target your activity. If the desired parameter does not appear, the parameter has not been fired by an mbox. Other custom mbox parameters are available in the Custom Parameters dropdown list.

Use the search box to search your audience list. You can search for any part of an audience name, or you can enclose a specific string in quotes.

You can sort the Audience list by audience name or by the date when it was last modified.

### 6.2 Mobile App Testing

You can use Adobe Mobile Services for mobile app testing.

iOS SDK 4.x for Marketing Cloud Solutions lets you measure native Apple iPhone and iPad applications, deliver Adobe Targeted content within your app, and leverage and collect audience data through audience management.

For details about using this SDK, refer to iOS SDK 4.x for Marketing Cloud Solutions.

### 6.3 Debugger

The Adobe Debugger (previously DigitalPulse Debugger) is a free tool provided by Adobe that lets you view the data being collected from your site on any given page.

When executed in your browser, it shows the image requests that transmitted data from that page into Marketing Cloud solutions, along with any variable values or parameters that were captured. This allows you and your developers to check the validity of your implementation on any page on your site.

The DigitalPulse Debugger is officially supported for use in all recent versions and builds of Mozilla Firefox, Google Chrome, Microsoft Internet Explorer, and Safari. It is installed as a bookmark in your browser. Copy the provided JavaScript code to your clipboard and then create a bookmark in a supported browser.
6.4 Adobe Target Integrations

Today, it’s essential to have a unified platform that easily integrates with applications while leveraging open standards and enabling agile development to create a diverse array of immersive experiences for customers.

Companies are frequently using various tools to measure and optimise different areas of their digital marketing (social media, email, analytics, and so on). Integration between technologies is critical because companies can benefit from integrated data and workflows that streamline processes, provide better insights, and enable greater agility.

6.4.1 Common Third-party Integrations

Listed below are the most common non-Adobe applications and integrations for Adobe Target.

For data

**Experian**: Experian Marketing Services’ (EMS) audience segments are powered by industry-leading compiled consumer database — ConsumerView℠. The database uses state-of-the-art technology, unique build methodology, and vast data sources with online linkages to deliver a superior database that addresses the sophisticated needs of today’s multichannel marketer. From demographics to behavioural and psychographic information, ConsumerView provides the most accurate, comprehensive information on more than 299 million consumers and 116 million households.

Experian Data Sets on Adobe. EMS’s extensive data resources are used to create syndicated, pre-built ConsumerView℠ audience segments available in the following categories: demographic, Mosaic® lifestyle segmentation system, TrueTouch℠ segmentation system and property and mortgage models.

Data Collection. ConsumerView℠ is developed from a wide array of sources, including self-reported information, aggregated panel data, websites that have permission to share information about visitors, public records and historical retail purchases that are collected offline and then brought online through proprietary online data partnerships.

Experian employs a rigorous process that includes the application of proprietary models, data from thousands of sources and proven algorithms to create its online audience segments. When
used separately or combined, these segments deliver a more complete and accurate 360-degree view of consumers.

For content

**Sapient EngagedNow Express:** Sapient EngagedNow Express™ is a cloud-based, usage-priced solution for launching and hosting marketing campaign websites. Express minimises delays and can eliminate up-front capital to launch new marketing initiatives and accelerate your path to market.

- Brand and campaign web templates;
- Component catalogue;
- Email/sweepstakes sign-up functionality;
- Integrated Adobe Target;
- Web and mobile optimisation;
- Multi-tenancy optimisation;

For Advertising — Display

**IMPACT 360:** IMPACT 360 Consumer Engagement Platform is a comprehensive platform for consumer engagement, delivered as a service. Relentless competition, demanding consumers, and an avalanche of new data and technologies keep today’s markets in constant upheaval. Keeping track of how consumers interact with your brand across traditional, digital, and mobile channels has never been more of a challenge. Wunderman's IMPACT 360 consumer engagement platform brings order to the most dynamic marketing environment.

IMPACT 360 delivers persistent views of individual consumers in real time, synchronised across online and offline channels — along with the data, capabilities, and management tools to engage them personally and consistently, carry out effective multichannel campaigns, and document success at every stage.

For more information on Adobe Target applications and integrations visit [Adobe Target Exchange](#).

6.4.2 Marketing Cloud Integrations

The Adobe Marketing Cloud includes powerful digital analytics and website optimisation products that deliver actionable, real-time data and insights to drive successful online initiatives. It offers an integrated and open platform for online business optimisation. The Cloud consists of integrated applications to collect and unleash the power of customer insight to optimise customer acquisition, conversion and retention efforts as well as the creation and distribution of content. Within the Adobe Marketing Cloud, marketers can share assets, data, audiences, reports, and more across these solutions and between different teams and team members.
Marketers can also gain a holistic view of their digital campaigns and performance as well as their overall optimisation strategy.

**Shared assets through the cloud.** With Adobe Target, you can upload, select, and share assets — images, text, HTML code, offers, and other creative — across the business and across your Adobe Marketing Cloud digital marketing solutions. The Content menu allows you to easily access and manage all your assets by simply pointing and clicking on them using the Adobe Target visual experience composer.

**Shared visitor data and audiences.** Using Adobe Target with Adobe Marketing Cloud also makes it easy to bring in visitor data from other solutions, like Adobe Analytics. This gives you even greater granularity when defining the audiences to Adobe Target. You can also share Adobe Marketing Cloud audiences defined in other solutions with other marketers, saving time and letting them benefit from your visitor segmentation knowledge and efforts.

**Cards and reports for enhanced, efficient communication.** The My Feed page in Adobe Target lets you quickly see the results of your campaigns and activities with “cards” that include reports, conversations about an activity, assets used in an activity, and more. You can share cards with team members throughout the Cloud and from different marketing solutions. You can even comment on and annotate a card and share it with a “board” to make sure that everyone on a specific board gets the same notification at the same time.

**Added context of Adobe Marketing Cloud activities with Adobe Target results.** Because Adobe Target is connected through Adobe Marketing Cloud, you can view testing and Adobe Targeting activities in context of other related activities in Adobe Marketing Cloud.

### 6.4.2.1 Adobe Analytics as the Reporting Source for Adobe Target

If you use Adobe Analytics as the reporting framework for an activity, all reporting and segmentation for that activity is based on Adobe Analytics.

Using data from Adobe Analytics in Adobe Target makes it possible to create A/B tests based on Adobe Analytics conversion metrics and audience segments. It also enables you to use Adobe Analytics reports to examine your data and results.

At this time, only A/B tests are supported.

All success metrics available to your test are Adobe Analytics metrics, except that your activity conversion can be an Adobe Target metric.

To use Adobe Analytics as the reporting source for Adobe Target, both you and your company must have access to Adobe Analytics and to Adobe Target. Contact your Adobe Customer Success Manager if you need either solution.
The three primary reasons to use Adobe Analytics data in Adobe Target are:

- Marketers can dynamically apply Adobe Analytics success metrics or reporting segments to Adobe Target activity reports at any time. It is not required to specify everything before running the test.
- Increased clarity in analytics results, achieved by minimising sources of data to compare.
- Existing Adobe Analytics implementation collects all required data. There is no need to implement mboxes on pages for the sole purpose of collecting data for reports.

You can use the Adobe Analytics data that you trust when working with Adobe Target, rather than a second set of data collected by another system. You can also use the success metrics and other tools that you have set up in Adobe Analytics. If you don't use Adobe Analytics, you can use data collected by Adobe Target. You must use one method or the other. You cannot collect data from both sources for a single campaign.

The result is one source of data, a single source of metrics, and one set of reports, eliminating the discrepancies that occur when combining two separate systems.

Using Adobe Analytics as your data system means you can apply Adobe Analytics success metrics and segments to your reports without needing to create them before the test runs.

After you set Adobe Analytics as your data source for Adobe Target, Adobe Target uses the Adobe Analytics metrics. For example, if you use the Visitor metric in Adobe Target, you are using the Adobe Analytics Visitor metric, not the Adobe Target Visitor metric, which is now called Entrants. This difference is especially important for basic traffic metrics (Visitors, Visits, Page Views) and conversion metrics.

For a more detailed explanation of this integration go to Adobe Target-Adobe Analytics Integration

6.4.2.2 Adobe Target Data Integration – Adobe Audience Manager

This integration brings Adobe Audience Manager segment data into Adobe Target. When complete, you can create Adobe Target offers and experiences with Adobe Audience Manager data.

Benefits and requirements:

Data integration lets you use Adobe Audience Manager data in Adobe Target to help improve rules-based content delivery. The advantages of bringing Adobe Audience Manager segment data into Adobe Target include:

- Access to other third-party data (useful when you're limited to your own, first-party data);
- Working with continually updated user profile data (internal Adobe Audience Manager synchronisation processes help keep user profiles current);
• Access to profile data older than 14 days;
• Creating customised user experiences based on first- and third-party data;
• Cross-domain visitor Adobe Targeting.

You must be an Adobe Audience Manager and Adobe Target customer to perform this data integration.

**Data Exchange Process:**

At a high level, Adobe Audience Manager sends data to Adobe Target as described below:

1. As the page loads, API code makes a call to Adobe Audience Manager.
2. Audience Management returns a JSON object that contains visitor-profile data.
3. The mbox.js file processes the returned JSON object. Any mbox on the page sends this data to Adobe Target.
4. Adobe Target evaluates this data against existing rules and returns appropriate content.

**Data Integration Steps:**

Follow these procedures to bring Adobe Audience Manager data into Adobe Target.

The data integration process uses the available features in Adobe Audience Manager and Adobe Target. Other steps require code changes to the Adobe Target mbox.js file.

The following table summarises the integration workflow.

<table>
<thead>
<tr>
<th>Product or Platform</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audience Manager</td>
<td>Create a cookie destination for Adobe Target.</td>
</tr>
<tr>
<td>Adobe Target</td>
<td>Add the plug-in code and the API call to your mbox.js file.</td>
</tr>
<tr>
<td></td>
<td>Create profiles and campaigns that use Adobe Audience</td>
</tr>
</tbody>
</table>
6.5 Democratisation

Democratisation refers to the process by which access to technology rapidly continues to become more accessible to more people. At an internal scale, the use of Adobe Target needs to be slowly democratised across your organisation. This can be done by sharing knowledge and training staff, and the result will be the better utilisation of the solution as internal engagement increases.

6.6 Automation

Automation can offset resource bandwidth issues. Whenever a company can substitute technology for people through automation, it means they can either reduce costs or reallocate resources to more strategic areas. Digital analytics can provide automated alerts to notify analysts of key problems requiring investigation, and refreshable Excel-based dashboards to simplify reporting and free up analysts’ time to focus on more strategic analyses.

6.6.1 Automated Personalisation Reports

Automated Personalisation Reports is available as part of the Adobe Target Premium solution. It is not included in Adobe Target Standard without an Adobe Target Premium license.

Specialised reports are available to users of Automated Personalisation.

Automated Personalisation provides three reports:

- Activity Level report;
- Offer Level report;
- Offer Detail report.

**Activity Level Report**
The Activity Level report compares the performance of using an Automated Personalisation algorithm to using no algorithm. The control can be any of the following:

- Random content;
- Default content;
- A manually created experience.

Click into the algorithm to access the Offer Level report.

**Offer Level Report**

The Offer Level report compares the performance of offers using a single algorithm (or no algorithm). Lift for these algorithm-applied offers is actually generated compared to the no-algorithm case.

Offers are shown within report groups, and these report groups can be collapsed and expanded. Toggle to see rolled-up information by reporting groups, rather than by offers.

Select an offer to view the Offer Detail report for that offer.

**Offer Detail Report**

The Offer Detail report examines the performance of a single offer. The top five most predictive variables for that offer are shown, and the predictive items are further broken down in bar graphs.

The Estimated Revenue is based on the incremental revenue value created with the metric.

6.7 **Leveraging your investment (The Big Picture)**

The Adobe Marketing Cloud includes powerful web analytics and website optimisation products that deliver actionable, real-time data and insights to drive successful online initiatives. It offers an integrated and open platform for online business optimisation. The Cloud consists of integrated applications to collect and unleash the power of customer insight to optimise customer acquisition, conversion and retention efforts as well as the creation and distribution of content.

Once you are up running with Adobe Target and want to grow your digital capabilities to the next level, you might want to go back to what your business needs are. We see a common trend of Adobe Target users purchasing Adobe Experience Manager (AEM) and/or Adobe Analytics as a next step in order to improve their web and mobile site experiences and at the same time expand their data collection and analysis capabilities. Clients who feel they have a gap in acquisition, or want to improve their customer reach, opt to follow their AEM or Adobe Analytics purchase with Adobe Social, Campaign or Media Optimiser depending on their specific needs.
If your objective is to increase engagement we suggest you purchase Adobe Audience Manager.

In the specific case that you manage high volumes of video content and want to improve your video delivery across channels and devices, Adobe Primetime will do the work.

Continue growing your digital marketing strength and add a new Adobe Marketing Cloud solution based on what your business demands. A good integration across solutions will help you make, manage, measure and monetise your content across every channel and screen.

6.8 Security

Adobe Target employs a multi-tiered approach to securing our applications in order to provide the highest level of availability and reliability. Ranging from the physical security of our data centres, the design of our software, our 24x7 support team, and multiple production environments, Adobe Target procedures strictly adhere to industry best practices.

6.8.1 Data Security
Ensuring the availability and the protection of our data is critical to Adobe Target. In addition to daily backups of all critical data, we store no personally identifiable information (PII) and have tools designed to monitor against the inadvertent collection of PII by our customers.

As necessary, Adobe Target employs third-party document and media destruction services to further protect both Adobe Target and our clients’ sensitive data. These commercial providers can accommodate not only our paper shredding needs but also our physical media destruction requirements.

## 7 Checklist

The following lists highlight some specific high-level points; they are not meant to be exhaustive but aim to give some pointers and provide a basis for your own checklists. You and your Adobe Customer Success Manager can use the first checklist to qualify which of our recommendations from this document have been put in place.

<table>
<thead>
<tr>
<th>Item</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Executive sponsor named and communicated</td>
<td>Client</td>
</tr>
<tr>
<td>2 Stakeholder buy-in across the business</td>
<td>Adobe</td>
</tr>
<tr>
<td>3 Testing communication plan created</td>
<td>Comments</td>
</tr>
<tr>
<td>4 A project name is assigned, a budget defined, project success criteria documented and this, together with the executive sponsor, has been communicated across the business</td>
<td></td>
</tr>
<tr>
<td>5 Steering Committee set up</td>
<td></td>
</tr>
<tr>
<td>6 Working group set up</td>
<td></td>
</tr>
<tr>
<td>7 KPI metrics set against current business goals</td>
<td></td>
</tr>
<tr>
<td>8 KPI metrics agreed and set across the business units</td>
<td></td>
</tr>
<tr>
<td>9 Digital strategy aligned and communicated</td>
<td></td>
</tr>
<tr>
<td>10 A testing strategy roadmap is defined and communicated</td>
<td></td>
</tr>
<tr>
<td>11 Roadmap includes tests to mature the business</td>
<td></td>
</tr>
<tr>
<td>12 Roles and responsibilities defined and communicated</td>
<td></td>
</tr>
<tr>
<td>13 A testing organisational structure is defined</td>
<td></td>
</tr>
</tbody>
</table>
14 Roles and responsibilities are documented
15 Training and enablement plan created
16 A proactive effort is underway to develop a culture of analytics and testing
17 Implementation process defined
18 Campaign analysis request workflow defined
19 External data integrations set up
20 Reports and dashboard by R&R setup and scheduled
21 Target Audiences defined and embedded in reporting
22 User groups and permissions are set up
23 Targets and Alerts set
24 Mbox calls and user usage reports scheduled
25 An ideation to deployment workflow is documented
26 An agile approach to campaign execution is applied
27 A community data dictionary is shared
28 Templates documented and used across the business
29 Adobe Target maturity assessment completed

The following diagram shows a series of tests to increasingly mature your organisation.
3-6 months
- A/B Testing
- Product Category Affinity
- Promotional Offer Testing
- Search term retargeting
- Campaign Affinity

6-12 months
- Geographic Targeting
- Application Form fallout
- Audience Behaviour Targeting
- Content participation
- Audience Segment Targeting
- Customer vs. Non-customer
- Customer Product holding Affinity & Cross Sell
- Customer Journey testing

12-18 months
- Secure Testing & Targeting
  - Upsell/Cross-sell
- Online Event Based Targeting
  - Acquisition
  - Activation
  - Retention
- Mobile App testing & Targeting
- Campaign Targeting
  - Email, SMS, IB, ATM?

18-24 months
- Transition from testing & targeting to Omnichannel personalisation
- Shared profile Event Based Targeting
  - Acquisition
  - Activation
  - Retention

Dependencies
1. Target Tech Implementation
2. Data/Audience Insights
3. People training & testing go to market process

1. Customer ID & Product Holding
2. Next Logical Product Matrix
3. Segment Messaging & Creative
4. Geographic plugin
5. Data/Audience Insights

1. Technical Capability Campaign Management (Secure & APP)
2. Online/Offline Data Integration
3. Real Time Event Targeting & Content Delivery
4. Data/Audience Insights

1. Technical Capability Omnichannel
2. Online/Offline Data Integration
3. Marketing Communication Strategy
4. Data/Audience Insights
Assistance Consulting Operational Maturity Review

Operational Readiness Assessment & Recommendations — $6k (per brand/business unit)

Adobe Consulting provides a package to review your operational business readiness and provide a recommended roadmap of initiatives to accelerate your maturity. This service is highly recommended if you are new to the solution and need assistance in evaluating your capabilities.

Activities include:
- Conference call/meeting to interview executive sponsor;
- Consulting guidance on completing the solution maturity assessment;
- Consulting walk-through of maturity operational readiness checklist;
- Qualification of current documents, templates, processes;
- Draft of initial findings, highlight focus themes reviewed with executive sponsor;
- Executive sponsor sign-off;
- High-level roadmap of recommendations presented to stakeholder group.
A/B test
An activity that compares two or more versions of your website content to see which best lifts your conversions, sales, or registrations.

activities list
Dashboard that displays a quick overview of activities.

activity
Enable you to test page designs and target content to specific audiences.

activity collision
An activity collision occurs when multiple activities are set up to deliver content to the same page. If an activity collision occurs, you may not see the expected content on your page.

activity URL
The default URL used for an activity.

AdBox
Useful for testing marketing from sites that do not have an mbox, such as affiliates.

audience
A group of similar-activity entrants who will see a targeted activity.

automated personalisation
Provides advanced machine-learning algorithms to drive personalised experiences and improved conversion rates for digital experiences.

behavioural ads
Tests and tracks visits to ads and other offsite content. You can also use behavioural ads to identify the same user on and off your site and deliver a consistent experience throughout their web experience.

campaign
Tests different experiences to determine which will be most successful.

campaign change log
A record of who changed your campaigns and when the changes occurred.

Campaign list
Dashboard that displays a quick overview of campaign activity.

capture score
An engagement metric that calculates an aggregated score based on the value assigned to pages visited on the site, from the point the visitor sees the campaign’s first display mbox.

category affinity
Automatically captures the categories a user visits and calculates the user’s affinity for the category so it can be targeted and segmented on. This helps to ensure that content is targeted to visitors who are most likely to act on that information.

combination
The content variations created when you test multiple content options in multiple locations in a multivariate test. For example, if you are testing three locations, each with three content options, then there are 27 possible combinations (3x3x3). A visitor to your
site will see one combination, also referred to as an experience or recipe.

**content**
The text or image comprising a test variation within a location. In a multivariate test, a number of content options within multiple locations are compared. In MVT methodology, the content is sometimes referred to as a level.

**conversion mbox**
Logs your test or campaign results, such as registrations, orders, or sales. Typically, a conversion mbox displays nothing, but merely listens. Common locations for the conversion mbox are a registration completion page, an order thank-you page, or a click-through. You might also use a global mbox to calculate conversion metrics.

**DAM**
Digital Asset Manager. The library containing items to be used as content in Target.

**default content**
Displays if the visitor does not meet the requirements of the test, or if default content is used as a control in the test. In Target Classic, every mbox must contain default content to ensure a positive visitor experience.

**display ad campaign**
Used for offsite Flash ad testing.

**duration**
The length of time than an activity runs, from the start date and time to the end date and time.

**dynamic content**
Can be part of any type of test or campaign. No additional programming is required. The visitor’s session on your domain is preserved.

**dynamic mbox**
Enables Rich Internet Applications (RIAs) to manipulate HTML after the page has already loaded by using technologies like DHTML and AJAX.

**dynamic offer**
Uses dynamic page technology to pass values to the offer.

**engagement**
The measurement of a visitor’s interest in a site, measured by time on site, clicks, conversions, and other metrics.

**entrant**
An entrant is a visitor who meets the criteria to enter an activity.

**experience**
Defines the content (or offer) that displays in an mbox. Sometimes called a recipe.

**experience targeting**
Target experiences to specific audiences using data collected by Adobe Target. In Target Classic, a landing page campaign.

---

**Flash campaign**
Used for onsite Flash testing.

**Flashbox**
Returns content elements to a Flash file.

**flow diagram**
The visual representation of an activity in Target Standard.

**geo location parameter**
Allows you to target campaigns and experiences based on your visitors’ geography. Also known as geo targeting parameter.

**goal**
The conversion or result that signals a successful activity. It is best practice never to run a test without having a goal to improve in some specific way.

**host**
Any web server (or web domain) from where you serve content during any stage of your project.

**host group**
Hosts are bundled into host groups for ease of management. The preset host groups are production, staging and development. However, you may add new host groups and rename your existing host groups.

**In-mbox profile parameter**
Visitor-specific parameter passed to the visitor’s cookie from the mbox. Returning visitor is an example of an in-mbox profile parameter.

**landing page campaign**
A landing page campaign allows you to use targeting to display different landing page content for different visits. Otherwise, the landing page shows the same content for each visit. A landing page campaign compares different versions of the page to help you see which version of the landing page produces more successful results. In Target Standard, replaced by experience targeting.

**location**
A specific content area on a page, often contained by a single DOM element. In MVT methodology, a location is sometimes referred to as a factor. A full-factorial multivariate test compares all possible combinations of offers in your locations.

**mbox**
An abbreviation for “Marketing box”. The location on your web page where content is displayed and visitor behaviour is recorded. Some mboxes do not display anything. They might track a visitor’s progress through your website, or might track whether the visitor completes a specific success metric, such as adding an item to the shopping cart or completing a purchase. One such type of mbox is a conversion mbox.

**mbox parameter**
Passed in the page, not the URL. Rendered uniquely for each visitor, it is used to pass data from your database and to track sales data or to run Adobe Recommendations. Also known as page parameter.

**monitoring campaign**
Tracks the performance of a conversion, success metric, or segment over time, independently of tests or campaigns run to affect it.

**multivariate test**
Test including many elements and variations with less traffic and fewer combinations than A/B...N tests require. A balanced test design is generated.

**objective**
An activity field where you enter a description of what you would like to learn from an activity.

**offer**
An offer is the content displayed within an mbox during campaigns and tests. An experience determines which offer displays when particular conditions are met.

**opt-out link**
Enables visitors to opt out of all counting and content delivery.

**optimising campaign**
Ensures the most effective experiences are shown more often by automatically distributing traffic to the best-performing segments.

**page count**
An engagement metric that measures the number of pages seen in a visit from the point the visitor sees the campaign’s first display mbox.

**priority**
Priority is used if multiple activities are assigned to the same location with the same audience. If two or more activities are assigned to the location, the activity with the highest priority displays.

**recipe**
Deprecated term defining the content that displays in a location. See *experience*.

**redirector**
Redirects a visitor to a different web page. Use this Redirector similarly to how you use an mbox in your tests to track clicks from display ads to your site, vary display ad destinations, and similar tasks.

**referring URL parameter**
Passes values to the destination page’s mbox as referring URL parameters and values. Use these to target on the visitor’s source, for example.

**role**
A group of users with a specific set of privileges.
Similar to in-mbox profile parameter, but defined with JavaScript in Target itself rather than in the page code.

**segment**
A specified set of criteria used for targeting a campaign. Only visitors who meet the criteria see the content of a campaign targeted to that segment. Some segments are reusable across multiple campaigns and other are specific to a campaign.

**segment filter**
A report filter used to display reports related to a specific segment.

**smart targeter profile parameter**
Similar to script profile parameter, but predefined to provide useful targeting functionality.

**success metrics**
The parameters used to measure the success of an activity.

**test**
A campaign that compares two or more experiences against the success metrics you specify, so you can choose the experience that is most likely to provide the results you want.

**time on site**
An engagement type that represents the time spent in the visit (in seconds) from the point the visitor sees the campaign's first display mbox to the load of the final page in the session with an mbox.

**URL parameters**
All referring page and page URL variables are automatically passed to an mbox whenever the page with the mbox is viewed by any visitor. These URL variables are then available to use for display targeting or segment filters in reports.

**visitor**
A visitor is any person who accesses your site. A visitor is evaluated against activity criteria to determine whether the visitor is included in an activity. See *entrant*.

**Visual Experience Composer**
In Target Standard, a representation of your page that provides a way to visually identify the components of a Target-enabled page and to modify portions of the page directly rather than requiring you to use the Target application.

**winning experience**
The best-performing experience in a test.
Below are some commonly used templates in managing your Target solution. If you would like a copy of these templates, please ask your Adobe Customer Success Manager for them.

Adobe Target – Campaign Request Form

Campaign Name: __________________________  Campaign Type: __________________________

Campaign Priority: ________________________  Campaign Targeting: ______________________

Campaign Aims & Description: __________________________

Measurement of Campaign Success: __________________________

If this test fails what would you have learned? __________________________

Campaign Setup & Creation Issues: __________________________

Recipe Targeting: __________________________

Resorting Segments: __________________________

Your Name: __________________________  Phone: __________________________

Email: __________________________  Business Priority: __________________________

1: As soon as possible 2: Next week 3: When you can get to it

Please list URLS for all pages & steps to conversion: __________________________

Please include screenshots of all display, steps to conversion and conversion pages where possible, below.

Once complete, please email back to ABC@ABC.com?
Testing Roadmap Template:

Target Campaigns - Gantt View:

<table>
<thead>
<tr>
<th>No.</th>
<th>Task</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Campaign 1</td>
<td>Create campaign template for product delivery</td>
<td>K095/H2,1.0.0</td>
</tr>
<tr>
<td>2</td>
<td>Campaign 2</td>
<td>Design advertising materials to be used in campaigns</td>
<td>K095/H2,1.0.0</td>
</tr>
<tr>
<td>3</td>
<td>Campaign 3</td>
<td>Plan roll-out for product launch, including social media strategies</td>
<td>K095/H2,1.0.0</td>
</tr>
<tr>
<td>4</td>
<td>Campaign 4</td>
<td>Create campaign template for product delivery</td>
<td>K095/H2,1.0.0</td>
</tr>
</tbody>
</table>

Target Campaign - Tabular View:

<table>
<thead>
<tr>
<th>Enterprise KBK's</th>
<th>Channel KBK's</th>
<th>Project Name</th>
<th>Business Objective</th>
<th>Success Measure</th>
<th>Priority</th>
<th>Status</th>
<th>Target/Deployment</th>
<th>Resource Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Business KBK's</td>
<td>Enterprise KBK's</td>
<td>Define and implement new product features</td>
<td>Achieve specified success criteria</td>
<td>Primary</td>
<td>Normal</td>
<td>1/2/2019</td>
<td>Task/Project (Business Analyst, Systems Analyst)</td>
</tr>
<tr>
<td>2</td>
<td>Business KBK's</td>
<td>Enterprise KBK's</td>
<td>Implement new product features</td>
<td>Achieve specified success criteria</td>
<td>Primary</td>
<td>Normal</td>
<td>1/2/2019</td>
<td>Task/Project (Business Analyst, Systems Analyst)</td>
</tr>
<tr>
<td>3</td>
<td>Business KBK's</td>
<td>Enterprise KBK's</td>
<td>Elicit customer feedback</td>
<td>Achieve specified success criteria</td>
<td>Primary</td>
<td>Normal</td>
<td>1/2/2019</td>
<td>Task/Project (Business Analyst, Systems Analyst)</td>
</tr>
<tr>
<td>4</td>
<td>Business KBK's</td>
<td>Enterprise KBK's</td>
<td>Test and refine new product features</td>
<td>Achieve specified success criteria</td>
<td>Primary</td>
<td>Normal</td>
<td>1/2/2019</td>
<td>Task/Project (Business Analyst, Systems Analyst)</td>
</tr>
<tr>
<td>5</td>
<td>Business KBK's</td>
<td>Enterprise KBK's</td>
<td>Evaluate customer feedback</td>
<td>Achieve specified success criteria</td>
<td>Primary</td>
<td>Normal</td>
<td>1/2/2019</td>
<td>Task/Project (Business Analyst, Systems Analyst)</td>
</tr>
<tr>
<td>6</td>
<td>Business KBK's</td>
<td>Enterprise KBK's</td>
<td>Implement changes based on customer feedback</td>
<td>Achieve specified success criteria</td>
<td>Primary</td>
<td>Normal</td>
<td>1/2/2019</td>
<td>Task/Project (Business Analyst, Systems Analyst)</td>
</tr>
<tr>
<td>7</td>
<td>Business KBK's</td>
<td>Enterprise KBK's</td>
<td>Monitor and report on customer feedback</td>
<td>Achieve specified success criteria</td>
<td>Primary</td>
<td>Normal</td>
<td>1/2/2019</td>
<td>Task/Project (Business Analyst, Systems Analyst)</td>
</tr>
<tr>
<td>8</td>
<td>Business KBK's</td>
<td>Enterprise KBK's</td>
<td>Implement additional features</td>
<td>Achieve specified success criteria</td>
<td>Primary</td>
<td>Normal</td>
<td>1/2/2019</td>
<td>Task/Project (Business Analyst, Systems Analyst)</td>
</tr>
</tbody>
</table>
## Summary of Test Learnings

**Q3 20XX**

<table>
<thead>
<tr>
<th>Location/Page Type</th>
<th>Lift</th>
<th>Impact Annualized</th>
<th>Brand</th>
<th>Tech Method</th>
<th>Learnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form/Sign Up</td>
<td>17.58%</td>
<td>-</td>
<td>-</td>
<td>CSS</td>
<td>Moved form from right side of page to left</td>
</tr>
</tbody>
</table>

### Control

**Terminix Power Brochure**

Call Today: 866-577-1611

**Terminix**

"It's not the one pest you see. It's the thousands you don't."

- Choose local ant control in California!
- Get rid of your troubles by getting local control. Terminix is trusted by homes and businesses for providing reliable ant control services.
- Terminix ant control in California provides Ultimate Protection.

### Winning Experience

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### Impact Calculator

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors</td>
<td>96,202</td>
</tr>
<tr>
<td>Days</td>
<td>15</td>
</tr>
<tr>
<td>RPV Winner</td>
<td>3.86</td>
</tr>
<tr>
<td>RPV Control</td>
<td>3.47</td>
</tr>
<tr>
<td>Revenue/Tr</td>
<td>$912,957</td>
</tr>
</tbody>
</table>

### Comments/Notes (100 words or less)

Please use this area to provide any additional information about the test and results. This will be shown in the "Comments" area of the post.