

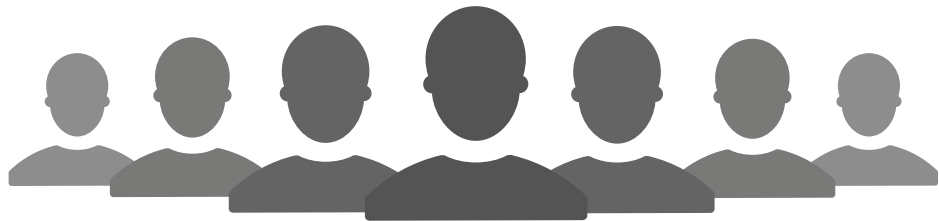
# OPTIMIZATION – ORGANIZING FOR SUCCESS

Numeric Analytics helps digital marketing professionals implement analytics and optimization programs that lead to deeper insights, higher revenue and customer loyalty.

**numeric analytics**

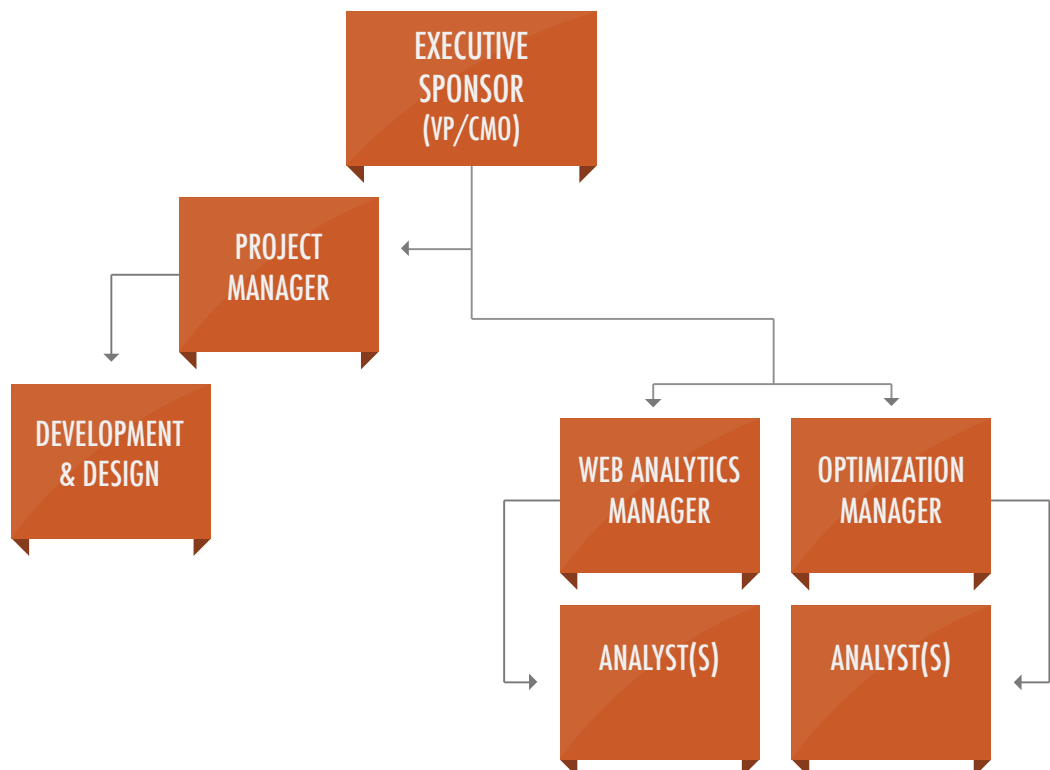
## People First, Technology Second

Optimization is a deceptively complicated process and isn't as simple as testing a green button vs. a red button. Optimization is a highly iterative and process-centric discipline that requires the time and skills of human capital to properly identify, prioritize, design and analyze optimization opportunities. Most companies start out with technology selection, rather than fully evaluating resources and skills to determine if training or additional head count is needed. While technology is an important decision, the technology selected will help with the mechanical aspects of test such as data collection, significance calculations, variant display, and targeting. However, it is the people who will have the biggest impact on the success or failure of your optimization program.



## Roles and Responsibilities

Most companies that are just starting out with optimization are usually working with a skeleton crew and don't have the resources necessary to hit the ground running. But, it is important to understand what roles and responsibilities are required to run a successful optimization program, even if you need to have one individual wear multiple hats. In total there are 5 key roles that need to be filled in a successful optimization program: Executive Sponsor, Project Manager, Web Analytics Manager, Optimization Manager, and Design/Development.



Regardless of how many people you have dedicated to optimization in your organization, you will want to ensure you minimally have members with experience in experiment design, statistics, marketing, web analytics (clickstream data analysis) and hands-on experience with HTML and JavaScript. These skill sets do not, and most likely will not, need to be held by one individual but can be spread out across multiple people in multiple business units, as long as there is some level of accountability for work towards optimization in each unit.

## Sample Organizational Chart and Responsibilities

### ROLE

### ROLE DESCRIPTION

#### Executive Sponsor

Acts as the organizational evangelist for data-driven optimization. Without this role most testing programs are dead in the water. This champion for change helps to keep the other executives and senior managers from dictating decisions based on a gut feeling, and use data to inform their decisions instead.

#### Project Manager

Works closely with the web analytics, optimization managers and development/design to ensure that everything is flowing as smoothly as possible. Makes sure insights delivered by the analytics team are being fed to the optimization team. Some of the other tasks of the PM are to keep the optimization team on task with their roadmap, ensure test plans are followed to the T, manage the various deliverables to ensure they are delivered on time, etc...

#### Web Analytics Manager

Provides proactive mining of all available data. Follows a methodology to prioritize efforts to ensure maximum impact of all analyst work. This work feeds the testing roadmap as well as analytics tracking adjustments, and can help to optimize overall marketing spend by ensuring maximum conversion from marketing efforts.

#### Web Analyst(s)

Works on the frontline of web analytics. This role can be as simple as a data squirrel, gathering the data nuts for others to consume, or as advanced as an analytics ninja, slicing through the vast amount of web data and delivering the deep insights that help drive a business forward.

#### Optimization Manager

This role is meant to drive testing / optimization strategy. Working closely with the analytics role - this role turns those findings into prioritized strategy and tactics that help to ensure that all testing efforts are focused on moving top line and bottom line results. This role traditionally also drives test planning and manages execution from test ideation through to test result interpretation.

#### Optimization Analyst(s)

Works closely with the PM to ensure tests are setup correctly prior to launch. Monitors the result of the test after launch to ensure everything is running as expected, and after the test is finished, compiles the data for the final analysis and makes recommendations based on the result.

#### Development and Design

Works on the implementation of tests and the design of new creative. In many organizations these roles can play an important part of the planning process, and is recommended to have them as part of the steering committee.

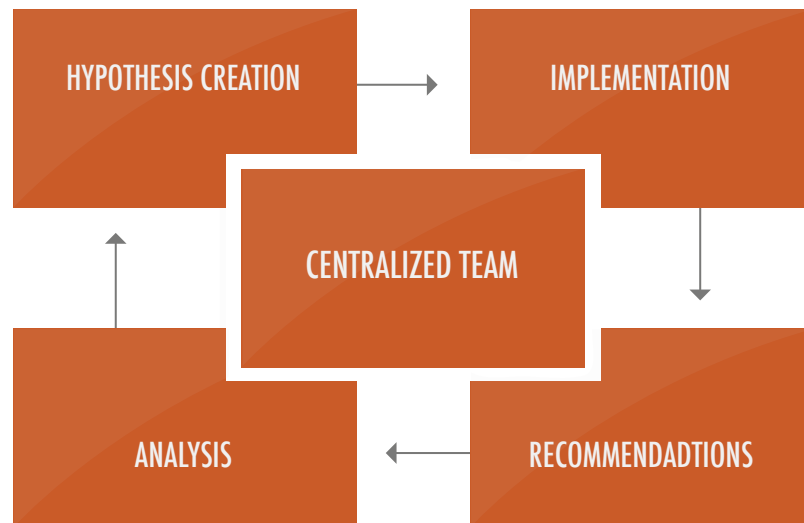
## Defining Ownership

With the inherent complexity of digital optimization, defining the ownership model of the optimization process is a key driver of success. The model that is chosen is often dependent on the organization's human resources, skills and level of experience with testing. In general there are 3 buckets that most organizations fall into:

1. Centralized Optimization Team
2. Center of Excellence (decentralized team)
3. Hybrid of centralized and decentralized

### Centralized Optimization Team

A centralized optimization team structure is the starting point for most organizations. The centralized team owns all aspects of testing: hypothesis and test plan creation, implementation, analysis and recommendations.



#### Benefits:

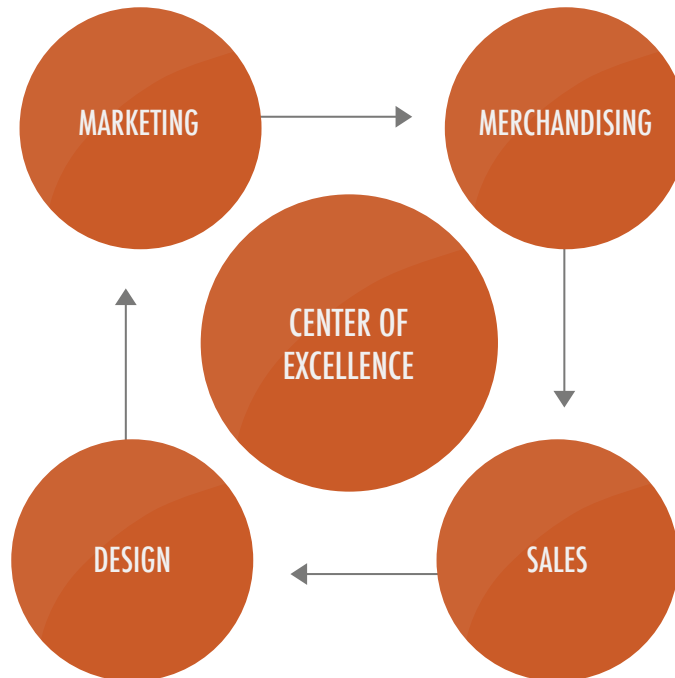
- Can operate on limited resources
- Centralization of knowledge and skills
- Ownership of end to end process
- Speed to market
- Centralized strategy/roadmap creation
- Greater ability to maintain and follow a methodology and process
- Greater ability to gain "testing skills" and results knowledge
- Strong connection to business analysts

#### Potential Limitations:

- Limited support from business units
- Lack of input from external groups
- Reduced oversight
- Central group viewed as a gatekeeper
- Limited bandwidth

## Center of Excellence (COE)

A center of excellence (COE) focuses on centralizing best practices, past test results and processes to act in a supporting role to the various business units (BU) throughout the organization. The COE also acts as the check point for the organization to make sure tests from different BU aren't redundant and/or overlap.



### Benefits:

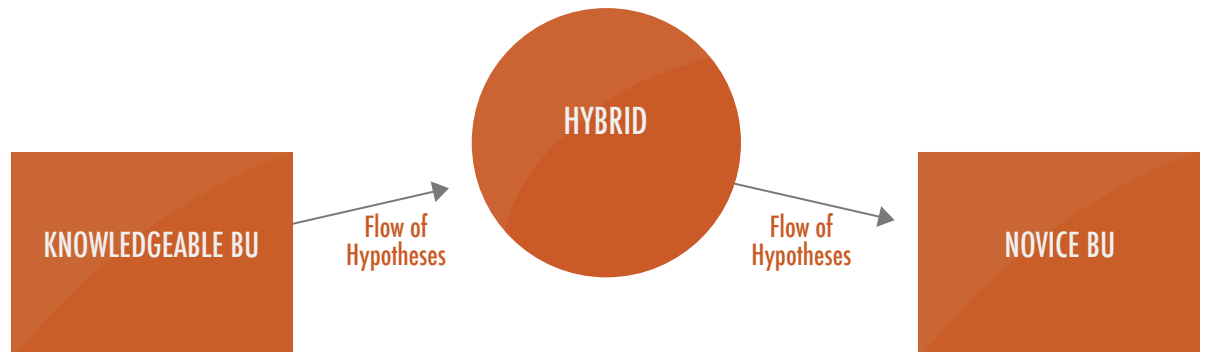
- Centralize best practices
- Facilitate knowledge share throughout the organization
- Spot check BU tests to ensure they don't overlap and are setup properly

### Potential Limitations:

- Risk of being considered a 'think tank' without profit motive
- BU could ignore the guidance of the COE and only reach out to them sporadically
- Management of multiple roadmaps

## Hybrid

The hybrid ownership model operates as a centralized team and as a COE. The level of involvement of the central group in the hybrid model depends on the sophistication of the BU they are working with. In most organizations there will be some groups who are savvy with optimization and others who are novice. This version allows those savvy BUs to operate a bit more independently while holding the hand of the novice BUs.



### Benefits:

- Centralize best practices
- Facilitate knowledge share
- Spot check or completely run BU testing

### Potential Limitations:

- Inconsistent roles based on BU
- Sporadic involvement with more advanced BUs
- Creation and management of multiple roadmaps

## Key Takeaways

1. Focus on people first and technology second. Optimization requires human attention and insights in order to be successful, and is not a one off technology decision. Organizations that focus their time and money on technology selection over building a skilled and focused team will not be as successful in the long run.
2. Select a dedicated resource for optimization. It is important to have at least one dedicated resources, even if only part-time, focused on optimization. The optimization process is too iterative and involved to be shuffled around to different resources or left to a committee.
3. Build your team. Most optimization programs don't start out with a fully dedicated team, but grow over time as the organization begins to see the value in the practice. It is important to make sure you build your team from the ground up and focus on the skills necessary to make optimization work.
4. Leverage third party resources to fill gaps. Most companies do not enter into optimization alone, but rather use third party resources to supplement or fully manage their optimization program. Acquiring people with the right optimization skill set, or learning those skills can be a lengthy process. Hiring an agency is often the fastest way to advance your organization along the optimization maturity curve.

## About Numeric Analytics

Numeric Analytics was formed in 2006 by a small contingency of analytics professionals that recognized the transformative power of analytics for companies of all sizes and the need for a consulting firm dedicated to helping customers take full advantage of this opportunity.

Today, some of the leading Fortune 1000 organizations look to Numeric Analytics for guidance on their business intelligence, analytics and marketing optimization initiatives. We specialize in helping customers create the programs that answer the complex, high-value questions that drive revenue, cut costs, and increase customer loyalty. Our deep analytics experience allows us to span engagements ranging from baseline analysis to data visualization and predictive analytics – all with the goal of empowering our clients to spend their marketing and e-commerce dollars more effectively.

### We can help answer questions such as:

“What are the customer journeys across channels that lead to a purchase?”

“Can I bring customer data in different formats and places together for a holistic view of my customer across online and offline channels?”

“For my customers in the research phase of my product, what is the best way to spend my next marketing dollar to move them further down the funnel?”

Numeric Analytics is the only service organization that has the expertise and strategic relationships with each of the following category leaders: Adobe (Analytics and Digital Marketing), Tealium and Ensignten (Tag Management), Pentaho (Business Analytics), and Tableau (Data Visualization) to name a few. With our partnerships, we bring leading edge technology and solutions to our clients. Our consultants, with an average of 10 years in the industry, act as an extension of our clients’ business and are trusted advisors committed to success.

Our goal is to help our clients solve complex marketing challenges, improve and create efficiency and insight into the full marketing and sales cycle from acquisition to retention – understanding who their customers are and helping them speak to them in a way that resonates and builds solid relationships.

### Contact Us

To have a conversation with us about how we can help, reach out to us.

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