

Achieving Experimentation Maturity:

Getting Leadership Buy-In, Developing Processes, Building a Team, and More



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Prologue

There is a part of your experimentation or testing program that is a dumpster fire. Admit it. There is someone in management that is floundering and not knowing what's happening, let alone the ROI of it all, or some part of the data system that is, at best, a black box but in reality a rotting fish.

In EVERY experimentation program I've been involved in and worked with business leaders on, there have been significant issues that had been ignored. I've seen leaders and managers shy away from tackling these barriers as they're unsure of the steps to take and so hesitant in their decisions. I've seen endless debates and unproductive meetings, even learned helplessness. Mostly I've seen countless wasted hours of delayed and duplicated efforts due to errors and general mismanagement.

The potential is far too big to ignore; let's fix it. So...

- \cdot Where do we start?
- How do we know we are making progress?
- What will the program look like when we finish? (Is there a finish?)

Before we get our hands dirty, there is another thing; let's not forget the push-and-pull from executives and decision-makers from different functions such as data, finance, product, marketing, etc...Now we've got ourselves a '6 blind men and an elephant' situation. One wants to fix data, the other the incentives, then there's the communication plan...what about the stats!... and how quickly will make money...? F*ck it, let's just start shipping products and not test at all!

"The only way that someone can be of help to you is by challenging your ideas." - Anthony de Mello

I absolutely believe in the statement above. I believe feedback is gold and that systems of feedback are even more valuable. Therefore I believe that a process and model to benchmark and monitor the growth and progress of an experimentation and testing program is vital to managing it. It's a 'what gets measured gets managed' sort of thing.

Experimentation and testing programs need measurement. Experimentation maturity benchmarks provide this. It's a system to see where you are today, where you need to go, and to help identify what are the obstacles in the way. It's classic problem-solution mapping. And it is a yearly or bi-annual effort that will go a long way to align, optimize, and motivate your team.



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Introduction

Experimentation is key to understanding your target audiences and is a powerful lever for driving meaningful results for your business. However, testing Version A against Version B for every website update or marketing campaign isn't a guaranteed path to more conversions and revenue. Experimentation isn't just about testing for the sake of testing; it's about conducting extensive customer research, analyzing data and developing new learnings, iterating on what works, and, most importantly, connecting with your audience. In order to do all of this well and at scale, you need to progress through the levels of experimentation maturity.

Experimentation maturity not only refers to how advanced and frequent your tests are but also the strategy and processes you have in place, the people on your team, the tools and data you use, and how experimentation is leveraged throughout your organization.

In this eBook, we'll look at the different levels and pillars of experimentation maturity so you can get a better sense of how mature your experimentation program is and how you can improve.

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The 5 Levels of Experimentation Maturity

There are 5 levels of experimentation maturity: Beginner, Aspiring, Progressive, Strategic, and Transformative. Let's explore what an organization looks like at each of these 5 levels









At this level, an organization is at the beginning of their experimentation journey. They likely have little capability or capacity for experimentation, which means the fundamental building blocks needed for an effective experimentation program have yet to be implemented. A Beginner company might not be running any tests at all and, if they are, they're running ad-hoc experiments and not yet focusing on strategy and data. There is not yet a dedicated experimentation team in place so people in other roles (e.g. a product owner or project manager) are multitasking in order to run these tests. A Beginner company may not have implemented any tools to run experiments on their website or other marketing channels.



An Aspiring business has likely established some of the important elements needed to build a successful experimentation program. These businesses typically have many internal hurdles to overcome (e.g. siloed teams, not enough buy-in or support) and processes to put in place in order to implement an effective experimentation program. For those working on the experimentation program, running tests is just one part of their job. An Aspiring company is likely using very little data to inform their tests and still running on assumptions, which means the tests do not account for a holistic view of their website and its visitors. The team might still be implementing new changes to the site without testing them first to see how they perform.





A Progressive

At this level, a company has the necessary foundational elements in place to run a basic experimentation program. A Progressive program is part of a business that is beginning to recognize the importance of data-driven experiments as well as the need to improve their processes to increase their performance. A Progressive experimentation team has some kind of strategy or roadmap in place and is starting to affect the company culture and drive business impact. At this stage, the company likely has dedicated team members who focus on testing and analytics.



Strategic businesses have most of the foundational and some of the advanced processes in place (e.g. test prioritization framework. roadmapping, program management), and their experimentation program is driven by a clear and applicable strategy. More of the company has begun to implement an experimentation mindset and is aware of what the experimentation team is working towards. Experiments are laddering up to larger business goals as well and not just focused on quick wins. A Strategic experimentation team likely has secured leadership buy-in and is seen as a key business growth driver based on the results of their tests.





A Transformative

These businesses are the industry elite and are consistently delivering results and driving growth. Now, the entire organization is using experimentation-this is no longer just one team running tests on the website. A Transformative company is constantly questioning their assumptions and thoroughly analyzing data to inform their future tests and decisions. At this level, an organization never stops at positive results and is constantly iterating on their experiments to continue delivering relevant customer experiences and driving business results.

The 4 Pillars of Experimentation Maturity

In order to progress through the 5 maturity levels, you need to build efficiency in the 4 pillars of experimentation maturity: Strategy & Culture, Process & Governance, People & Skills, and Data & Tools. Think of these 4 pillars as the building blocks of your experimentation program. While each pillar differs from the others, they are all dependent on one another and are all necessary for building an effective experimentation program within your organization.

There are a handful of activities within each pillar that your organization may engage in, from securing leadership buy-in for your experimentation program to deciding which KPIs you'll track. We'll help you understand what the different levels of maturity look like within each activity and, further, help you understand what your best course of action is to mature in these areas.





Strategy & Culture

Strategy & Culture

What It Is:

These are high-level activities that influence the growth and support of the experimentation program, such as securing leadership buy-in, fostering cross-functional collaboration, and tying experimentation strategy to greater business objectives.

Why It's Important:

Experimentation is a tool to optimize your decision making. Without a proper experimentation strategy and culture, you're not working in a data-driven way and, in turn, not necessarily making the best decisions for your customers or your business.

Leadership Buy-In

Why It's Important: Without the right leadership buy-in, you may not even get the chance to run these experiments and make better decisions for your business. The quantity and quality of your ideas don't matter if leadership doesn't enable you to have the tools to run the ideas, nor the processes to allow for approval of the ideas.

What It Is: Leadership buy-in gives you the executive sponsorship you need to secure a seat at the table and keep experimentation top-of-mind in decision making across the organization. For example, if a product owner wants to launch a new feature, a leader who prioritizes experimentation will push for the feature to be tested first instead of just rolling it out and hoping for the best. Consequently, leadership buy-in helps you progress through the levels of experimentation maturity by building support and collaboration from the top down, providing the necessary resources to conduct research and run tests, and championing data-driven decision making throughout the entire company.

Examples of How to Mature: To build a strong culture of experimentation and grow your testing program, support needs to be fostered from the top down. However, it's important to remember that getting leadership buy-in is a two-way street, meaning your experimentation team needs to show leadership the ways in which you can support their objectives and ultimately drive business growth. This means presenting a clear strategy and consistently reporting on test insights to gain leadership's confidence and ultimately secure the necessary resources your team needs to run tests and further the business.



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How do you make the business case for the investment in experimentation?

Some companies get it, and some don't. But if you're going to test, then get better at it by 'greasing the flywheel' where it matters. That said, there are clear strategic narratives that 'sell' why we should experiment; it is a driver of innovation, feeding the optimizations of a business."



Ben Labay Managing Director



Evangelism

Why It's Important: Experimentation works well when it is ingrained in many functions across your organizationthis allows for greater inputs and, in turn, greater business impact. Your customer service team, for example, is a critical source of valuable feedback and insights. But if the customer service team doesn't have any knowledge of your experimentation program and how it works, then they won't feel compelled to contribute their insights and ideas. To avoid missing out on extremely valuable research and test ideas, you need to be transparent about your experimentation program to generate interest, support, and excitement from other teams.

What It Is: Evangelism is creating and nurturing excitement for experimentation throughout your organization. In order for your experimentation program to be supported and successful, it first has to be globally understood at a basic level. Experimentation can sometimes be seen as a "black box" to the rest of the company, meaning others do not understand experimentation or its value to the company, nor how the program is run or what specifically is being tested, which could lead to pushback. In order to avoid this, you should focus on sharing what you're working on and getting employees from other teams excited about experimentation so they feel empowered to contribute some of their own insights and test ideas.

Examples of How to Mature: In order to become more mature in this area, your organization should keep experimentation at the forefront of business strategy and decision making, while also drumming up excitement and encouraging cross-functional collaboration. This means being transparent about testing efforts and insights by communicating them across the organization in a regular meeting or email so everyone is in the know. You can also help employees feel empowered to contribute their own ideas by holding open brainstorming sessions or having a Google form where they can submit ideas at any time. Further, show them that you're taking their contributions seriously by vetting the list and incorporating their test ideas into your roadmap.



Collaboration / Center of Excellence (CoE)

Why It's Important: If your experimentation team doesn't secure proper leadership buy-in, you'll struggle to build cross-functional collaboration and have greater influence across your organization. This can limit your experimentation program, meaning you'll be stuck running basic tests that do not truly affect your business as a whole. But once you get the right buy-in and get all other teams on board with experimentation, your influence and impact on the business will grow exponentially.

What It Is: Collaboration looks at how well experimentation has been embedded into the various functions within your organization. When you break down silos and encourage cross-functional collaboration, experimentation can become more decentralized, meaning various functions like product, marketing, UX, engineering, and more have their own experimentation teams. You can also take a more centralized approach to experimentation by establishing a Center of Excellence (CoE) which provides consistency, training, and guard rails for all teams and acts as the connective tissue holding together experimentation cross-functionally. You can even take a hybrid approach (meaning a combination of a centralized and decentralized model)-this goes to show that there isn't necessarily one right way to approach collaboration, so find what works best for your organization.

Examples of How to Mature: While it sounds simple, building trust and good working relationships with the teams across your organization is the first step to fostering collaboration. In order to achieve this, you should work with other teams to understand their KPIs and the problems they're trying to solve, and then find ways to optimize these KPIs and solve these problems through your tests. You should also prioritize transparently communicating your test results and insights in company-wide meetings or emails to fuel cross-team learnings and get other teams excited about the impact of experimentation.

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Here are some tips and tricks to help you foster collaboration:

- Collectively understand the purpose of what you're working on together
- Intentionally create time to review data as a team and create user pain point stories from the data
- Leverage outside resources to inspire you to solve problems in a meaningful way (e.g. books, blogs, competition, past experiments)"



Jocelyn Czerwinski Director of Customer Success Intellimize



Personalization / Targeting

Why It's Important: While building an internal culture of experimentation is essential, your experimentation strategy also needs to account for the user experience on your website. Personalization and targeting help you optimize the user experience by creating a one-to-one experience they can't get anywhere else (which, in turn, increases their odds of conversion).

What It Is: Advanced personalization, targeting, and segmentation allow you to speak more towards an individual user. If you aren't using any personalization or targeting, then you're likely running the same experiments on every page of your website without addressing the visitor's needs or meeting them where they are in their journey. But as your organization becomes more mature and targets your experiments by at least one dimension (e.g. new vs returning users), you'll create an experience that better caters to the individual needs of your visitors. As your organization continues to refine your targeting and personalization tactics, you will optimize the overall customer journey and drive your business forward.

Examples of How to Mature: Data analysis is instrumental in improving maturity in this area. By analyzing what is happening within different segments (e.g. behavioral data and conversion events) as well as reviewing results from previous tests, you can go on to create a strong personalization strategy that allows you to create a unique experience for each of your visitors.

Linking Business Objectives with Experimentation Strategy

Why It's Important: Experimentation is meant to move your business forward, which means your testing strategy must link to your greater business strategy to affect change. If you're not optimizing for the same metrics that your leadership team is (e.g. you're trying to increase conversions while they want to increase lifetime value), it will decrease trust in your efforts and negatively affect leadership buy-in and the overall culture of experimentation in your organization.

What It Is: In order for experimentation to support the business strategy, you need intimate knowledge of how your business is operating and evolving. Organizations without cohesive experimentation strategies might not identify test metrics until after the test ends, or only run tests that impact short-term metrics like lead conversions, leaving little room for impact on business objectives. But as your organization starts to align your experimentation goals to the business goals, you will vastly improve the customer experience and drive long-term metrics like customer retention and customer lifetime value (CLTV).

Examples of How to Mature: In order to mature in this area, experimentation should be at the forefront of the discussion when guiding business strategy. It might take some work to get a seat at the table, which means you need to have a clear experimentation strategy that defines your roadmap, and strong hypotheses which demonstrate how experimentation can impact the business metrics that matter to leadership. You should also find and demonstrate a way to reliably track CLTV as this is a critical long-term metric for any business.



Test Complexity

Why It's Important: Running only simple, front-end tests like button color tests won't impact your long-term business strategy or drive meaningful growth. Just like you need to link business objectives to your testing strategy, you also need to balance your program with high-quality, complex tests to inform strategy and advance your business.

What It Is: Upleveling your tests to higher quality, complex tests (when applicable and as dictated by your strategy) can help you generate more effective insights and drive business impact. In the early levels of experimentation, you're likely only running front-end (aka client-side) experiments on your website, testing elements like button colors, copy, and image changes. As your organization becomes more mature and secures more resources to further optimize the user experience, you'll leverage multiple kinds of testing like server-side and mobile app testing. These tests will not only help to validate features but also proactively identify new features to build through experimentation. This allows your organization to optimize both the look and feel and the functionality of your website, reducing friction in the user experience and, in turn, positively impacting your business by increasing conversion rates.

Examples of How to Mature: Your organization can mature in this area by up-leveling experiments from quick wins to tests that impact your business strategy and bottom line. You should also run experiments that impact the full funnel and not just the top of the funnel. For instance, you can first map out the buyer journey across your website, pinpoint the potential drop-off points, and develop the necessary experiments to address these particular areas for improvement.



Strategy & Culture: How We Can Help

Speero by CXL

Spawned from the market-leading and benchmark experimentation content hub CXL, Speero was founded in 2011 and is a full-service experimentation agency, establishing, supporting, and expanding client experimentation teams beyond the realms of CX and CRO.

Intellimize

Intellimize sets its customers up for success by helping them build an effective experimentation strategy and leverage its machine learning-powered solution to carry it out. Plus, Intellimize customers have a comprehensive dashboard at their fingertips to review insights and results, demonstrate the impact of experimentation to leadership, and develop a newfound experimentation culture across the entire organization.



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Process & Governance

Process & Governance

What It Is:

These are the processes (and application of those processes) across the organization to make sure experimentation is run the optimal way and the growth of the program is supported.

Why It's Important:

Without the optimal processes in place (or worse-having processes that no one is following), you can't run an efficient experimentation program. A lack of process and governance will slow down your testing velocity, decrease trust in your program, and, in turn, your leadership buy-in and funding.

Hypothesis Generation

Why It's Important: Hypothesis generation is not just about predicting the expected outcome for a test but solving a particular problem on your website. It can be easy to get caught up in the cool things other businesses are doing on their websites but, at the end of the day, experimentation is meant to help you make better decisions for your business. So, in the first step of hypothesis generation, be sure to define your 'why' (or problem statement) and how you intend to solve it with this test. And, as always, make sure your hypothesis is backed by solid research.

What It Is: Generating hypotheses means defining your problem statement, inputs, and expected outcomes for your experiments based on data. Organizations in the earlier stages of maturity will likely generate hypotheses based on assumptions rather than data or first-party research. As you start to mature in this activity, remove assumptions from your hypotheses and base them on former test results and various other data sources (e.g. analytics, heatmapping, UX research, etc).

Examples of How to Mature: The most important step to maturing in this area is to base your hypotheses on research. You should leverage multiple data sources such as previous test results, analytics, and any other available qualitative and quantitative data sources. Of course, if you don't have many research or data sources available, it will be critical to secure leadership buy-in and invest in the proper research tools. However, you can still set up and distribute small surveys to your prospects (asking about things like customer motivation, their preferred buying process, and their perception of your brand/product) and leverage these responses in your test ideation and hypothesis generation. When you have the right resources, you'll want to collect advanced research/data to identify problems, and the hard work is done. Hypothesis generation is brainstorming solutions to solve those problems, but they must be grounded in solid research.

Prioritization Framework

Why It's Important: It's important to prioritize the order of your tests in an objective manner based on their potential impact, the amount of effort required, the research you have to support them, and other practical items (e.g. traffic to the page you want to test, statistical significance thresholds, and MDE (minimum detectable effect) calculations). For example, if a test will take a large amount of effort to build and take roughly 2 months to hit statistical significance due to low traffic on the page, it behooves you to prioritize other tests ahead of this particular test in order to move the needle for your business.

What It Is: A prioritization framework allows you to objectively lay out the order in which you'll run your experiments. When your organization does not yet have a prioritization framework in place, you are simply testing your ideas based on subjective-and often arbitrarycriteria. To successfully map out the order of your tests and have the biggest business impact, you should use (and closely follow) a robust prioritization framework that dynamically prioritizes test iterations.

Examples of How to Mature: Your organization can become more mature in this area by using a prioritization framework (specifically one that reduces subjectivity like the PXL framework), sticking to it, and consistently ensuring that you're approaching your experimentation roadmap objectively and removing assumptions from your work.

Roadmapping

Why It's Important: If you're only optimizing your website for quick wins that only impact short-term metrics and can't be iterated on (e.g. button color tests), you can't drive your business forward in the long run, which ends up making it even harder to get funding/resourcing to scale your program. However, with a long-term plan that accounts for your hypotheses, test iterations, quarterly business objectives, and more, you can properly prioritize and strategize your experiments and set yourself up for success.

What It Is: A roadmap is essentially the long-term plan behind your experimentation program. Those who are lower in maturity tend to not have any kind of roadmap or strategy in place and instead run tests as ideas come up. As you begin to mature in this activity, you'll create a solid plan that prioritizes all tests and iterations through a rigid framework and includes their data-driven hypotheses and estimated test durations. Your roadmap should also make sure that tests are run in an optimal manner across the organization, ensuring that tests are run with minimal cross-pollination or controlling for cross-pollination with proper statistical vigor.

Examples of How to Mature: Building a roadmap and using it as the foundation of your experimentation program is the key to maturing in this activity. Your roadmap should also be easily accessible so that your entire organization has visibility into what the experimentation team is working on and how they prioritize experiments.



Program Management

Why It's Important: In order to keep your experimentation program optimized and moving forward, you need someone who is solely focused on the management of the experimentation program. A program manager not only oversees your experimentation program but is also involved in many other key functions like making sure you're measuring the right metrics, building collaborative relationships, and establishing and enforcing processes.

What It Is: Having a program manager for experimentation is key to ensuring the program can continue to grow and make a positive impact on your business. Once you secure a dedicated program manager, they should make sure that all systems of governance are followed and that cross-team collaboration is happening regularly so you can uplevel your experimentation maturity.

Examples of How to Mature: Getting a dedicated program manager is paramount to becoming more mature in this area. If you don't have the available resources to hire a dedicated person, see if you can outsource this to Speero (or another agency) or even have a project manager in your own organization help with program management. It is also important to establish and maintain guardrail metrics, continually follow procedures to create a standardized experimentation program, and hold consistent check-ins with functional leaders so you can sync priorities.

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All the choices we make are experiments. So, we might as well learn as much from them as possible. For that we need to know how to measure the impact from what we do and how to leverage the gained knowledge and insights to do better with the next choice."



Edgar Špongolts Director of Product

Quality Assurance (QA)

Why It's Important: The worst thing you can do is spend days building a test only to have it break post-launch or disrupt something on your website. There are various costs to a poor (or non-existent) QA process-wasted time, wasted resources, and delaying your roadmap! That's why it's critical to build solid QA processes and allocate extra time in your test building for QA so you can confirm the change you're testing won't break anything now or in the future on your site.

What It Is: QA processes are essential for making sure your tests are running as planned and that your analytics data does not break. If you're not checking tests for validity and accuracy or are doing so on an ad-hoc basis, then you may experience a high number of tests breaking post-launch. As you mature in this area, you should formally establish a QA process and follow it for each new test launch, and aim to reach a 'fail rate' (aka the rate at which experiments break post-launch) of less than 5%.

Examples of How to Mature: The main way to become more mature in this area is to establish a QA process for your experimentation program and stick to it so that tests are run in a more standardized fashion and have a small chance of breaking. If you don't have an engineer that sits on your experimentation team, try to secure dedicated bandwidth from your engineering team to help with QA.



Pre-Test

Why It's Important: Aside from hypothesis generation and test prioritization, there are steps you need to take pre-test to determine if the test is even worth running. For example, if an MDE calculator shows a test will take years to reach a 1% lift (due to traffic volume), then it's not worth your time and effort to move forward with the test. Doing this work before you begin the test-building process can help you avoid this pain and, in turn, prioritize the tests that have the biggest potential to impact your business.

What It Is: Pre-test processes are the standards you follow before a test is launched. These standards include MDE and statistical significance calculations, test reporting templates, roadmap maintenance, and decision trees for next steps after the experiment has run. What is critically important about pre-test analysis is ensuring that you are thinking about logistics regarding experimentation. It's easy to run an experimentation program; it's hard to run a good experimentation program. You need to ensure that you're running tests that will drive value for your company on a long-term basis. This is why things like decision trees for experiments are important. Knowing what the next steps are if a test wins (or loses), and getting those activities spun up before a test is even launched can help ensure a seamless experimentation process. Without this, you may spend a lot of time waiting, whether it's because a test will never reach statistical significance, or you didn't get another test in the queue while the current test was running.

Examples of How to Mature: Using a variety of contextappropriate validation methods (e.g. MDE and statistical significance calculations) is key for achieving maturity here. If a pre-test analysis isn't looking good but you're still keen on trying this test idea, you can also leverage qualitative techniques (e.g. <u>5-second tests</u>, user testing, etc) to estimate its impact. Once you've done your due diligence and confirmed that the test is ready to move forward, use decision trees to help you plan your next steps after the test has ended. Making these decisions pre-test can help you increase your testing velocity and scale your experimentation program over time.

Analysis

Why It's Important: A test is meaningless without proper analysis. Strong analysis (and the processes by which you conduct this analysis) is crucial for unveiling insights about your audience and their behavior. Segmenting your data and looking at specific cohorts (e.g. desktop vs mobile users, new vs returning users) can help you generate additional insights and, in turn, help with your future targeting and personalization efforts.

What It Is: It is critical to have processes and resources in place to inform standardized, objective test analysis. Companies lower in experimentation maturity tend to focus only on one top-level metric (e.g. conversion rate) and ignore analyzing other relevant metrics (e.g. micro conversions, CLTV) that have a direct impact on that primary metric. As you progress in maturity, you should use data-driven hypotheses to determine your metrics pre-test and follow a standardized data analysis process post-test to unveil key insights about your audience. CLTV should be considered as a metric for every experiment in addition to your other metrics to measure your long-term business impact.

Examples of How to Mature: Your organization should establish clear data analysis processes as well as processes for prioritizing metrics within experiments (e.g. prioritizing long-term metrics like CLTV and not just short-term metrics like conversion rate) to mature in this activity. A ruthless digging towards understanding the 'why' behind experiments (vs accepting the results and moving on) helps identify future iterations, and increases your win rates for experimentation! If there are multiple people on your team or outside resources (e.g. your analytics team or an agency) conducting data analysis, these processes will help standardize this analysis and ensure your data is 1) flowing properly pre-test and 2) analyzed for deep insights post-test.



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Look at more metrics than just what the test affects directly. You may want to do a long-tail analysis and see what's the effect at the bottom of the funnel (meaning, are we getting more sales opportunities from this?)."



Lennon Cole Sr. CRO Maturity Consultant Intellimize



Communication & Internal Marketing

Why It's Important: The way you communicate your test results and insights will directly affect how leadership and the rest of your organization perceive your experimentation program. If you lead with button color tests, you may be training leaders to expect that is the only thing your program can do-and they will consequently not find much value in your program. But if you lead with a combination of strong insights (e.g. how you're improving the customer experience and CLTV over time) and quick wins, you'll show both short- and long-term value of your experimentation strategy as it relates to your business strategy.

What It Is: It is essential to clearly communicate test insights to your stakeholders and ensure that standard processes (e.g. test reporting templates, roadmap maintenance) are followed after a test is run. Those nascent in experimentation maturity do not yet have standardized test reporting templates and have no systems in place for automated updating of program roadmaps. This means that other teams in your organization will be left in the dark regarding test results and insights. To avoid this, you should hold regular meetings with key stakeholdersand anyone else who's interested in experimentation-to provide updates on priorities and test results and maintain excitement for the experimentation program. **Examples of How to Mature:** Creating standardized test reporting templates so you can effectively communicate test results and insights across the organization is one way to become more mature in this area. You can also mature by ensuring roadmaps are regularly updated and easily accessible to everyone in your organization. By continuously communicating the right insights with leadership (e.g. how experimentation is furthering the business), you will garner stronger support and buy-in for your experimentation program. You should also leverage your data-driven processes to provide the internal communication pieces in the format that works best for the given internal cohort (e.g. kanban for engineers, Gantt for product owners).

Process & Governance: How We Can Help

Speero by CXL

Speero founders Peep Laja-the #1 most influential experimentation expert in the world-and Viljo Vabrit have always prioritized optimizing customer experiences. Over the years, the business has delivered results for hundreds of brands all over the world. In 2020 the company changed its name from 'CXL' to Speero, to support its renewed focus on helping companies understand their customers better through data, research, and experimentation to drive long-term growth, not just short-term wins.

Intellimize

Intellimize can help your organization create better experimentation processes. Our Customer Success team can help you conduct heuristic analyses, generate hypotheses that are rooted in research and address the entire buyer journey, and build prioritization frameworks and roadmaps.



People & Skills

What It Is:

These are the dedicated resources that support experimentation and the specific skills they bring to the table to further the experimentation program and the business.

Why It's Important:

Having the right specialization of skills across your team is critical to your ability to run tests and scale your experimentation program. While many people see CRO/experimentation professionals as people with skills across many areas like UX, design, analytics, etc, you'll find much more success with multiple professionals specialized in one area.

Intellimize species

Experimentation Team

Why It's Important: Having a dedicated experimentation team with the right skill set is critical to running effective tests and driving better decision making.

What It Is: The staffing of your experimentation team ensures the growth and governance of your experimentation program. Organizations in the earlier maturity levels might not have dedicated people that sit on the experimentation team but, rather, someone like a product owner running tests as one part of their job. As your organization matures and has at least one dedicated person on the experimentation team, you'll likely struggle to scale your testing efforts due to a lack of bandwidth from supporting teams such as UX, marketing, and engineering. Once you secure dedicated support for your experimentation program (internally and/or externally), you can consistently run tests and augment your testing velocity on a quarterly basis.

Examples of How to Mature: First and foremost, you need to have proper leadership buy-in to ensure you have the support and the budget to build your experimentation team. Once you have that, you can move forward with finding team members (or an agency) who are dedicated to experimentation and the growth of your program (aka specialists who accelerate testing velocity). If you work at a smaller organization that just doesn't have the resources to staff various specialists, focus on hiring a strategist who can build relationships with other teams or even an agency to get the experimentation support needed.

As a secondary option for organizations that cannot get management buy-in, there is an option to build up a grass-roots approach to experimentation. This usually involves getting a group of experimentation enthusiasts together and selecting a champion within that group. This champion will be the leader-ship-facing person who drums up excitement for experimentation and works to gain resourcing for continued testing.



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Owning a testing tool doesn't mean you have an experimentation program. Maturity comes from staffing the rightly skilled people, having an abundance of data and the right tools to execute, establishing proper processes, and so much more. Having tools and running experiments doesn't make your program a GOOD program."



Shiva Manjunath Senior Strategist

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Project Managers / Product Owners

Why It's Important: Much like the overall business strategy, experimentation should support two key players in your organization: project managers (PMs) and product owners (POs). Working closely with these groups can 1) empower your experimentation program to be project managed (and therefore more effective) and 2) help POs use experimentation as a tool to build a better product.

What It Is: Working with PMs and POs should be a symbiotic relationship for your experimentation team. As you create an open line of communication with PMs and POs and hold regular status meetings, your teams can integrate with one another and work toward creating a collective strategy and vision for the business. At the peak of maturity, your experimentation team should be entrenched in the PM/PO process (and vice versa), and PMs/POs should use experimentation as a guide for any and all decision making.

Examples of How to Mature: The key to maturing in this area is to establish a collaborative relationship with PMs/POs and show them how they can leverage experimentation to build a better product. Experimentation allows your product team to mitigate risk by testing a new feature before rolling it out to 100% of your audience. This allows your product team to address any bugs and iterate on new features as necessary; not to mention, it means you'll avoid any major disruptions in the user experience.

Data Analysts

Why It's Important: Running an experiment is pointless if you don't properly analyze the data to draw learnings from it. Pulling the right insights from your experiments will help you better understand your website visitors and run tests to further improve the user experience-and this doesn't happen unless you have resourcing help from data experts.

What It Is: Data analysts help your experimentation team analyze test results, corroborate data sources, and ultimately draw conclusions from each test. Without dedicated staff for test analysis, you'll likely be relying on the testing tool to dictate whether a test is effective or not. Once you have a dedicated analyst that sits on the experimentation team, you can take a more proactive approach to data collection and analysis in an effort to collect deeper insights and run better tests.

Examples of How to Mature: Having a dedicated capacity from data analysts for your experimentation program is key to maturing in this area. If resources don't allow for you to hire an analyst to sit on the experimentation team, then you can build strong relationships with your analytics team to get dedicated bandwidth from them for test analysis. In order to optimize your data analysis, utilize frameworks and processes that ensure experiments are built for proper tracking and data collection–setting up tests properly allows for easier data analysis and, of course, more learnings.

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Developers / Engineering

Why It's Important: A test won't go anywhere if you don't have the ability to actually code it. Dedicated engineering resources can help. Without a dedicated and consistent resource, you won't be able to run more complex, high-quality tests or scale your experimentation program. And, when you do have a winning test, you might wait weeks or months to get rolled out to production.

What It Is: Your developer/engineering resources are critical for ensuring that you can build experiments efficiently and roll out winners as rapidly as they're found. With limited dedication from the engineering team, it can be difficult for your experimentation team to stay on track and hit the testing milestones on your roadmap. As your organization matures and secures more consistent bandwidth from your engineering resource, you can run a healthy balance of both front-end and back-end tests to optimize the look and feel and functionality of your website.

Examples of How to Mature: One way to improve maturity in this area is to have processes in place for developers (e.g. test building processes, processes for declaring winners and baking them into the base site) even if you don't have a dedicated engineering resource yet. Of course, having that dedicated engineering resource is the biggest way to unlock maturity in this area so you can scale your experimentation program and build more complex client-side and server-side tests over time. If you're unable to hire your own dedicated engineer, work with your engineering team to get dedicated bandwidth from them or companies like Intellimize and Speero who can provide developer resources to help you move your experimentation program along.

UX / UI

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Why It's Important: Research is the foundation of the tests you run. Without it, you won't have proper insight into user behavior and will be running tests purely based on assumptions rather than data.

What It Is: The experimentation team's UX/UI resources support and prioritize the research and copywriting for tests. Without any dedicated UX/UI resources to instruct on research, you're either testing inconsistently or running tests based on assumptions rather than data. As you work more closely with UX/UI and secure dedicated bandwidth from them, you should work toward building a shared vision for a UX/experimentation strategy, hold regular status meetings, and consult with one another before making any business decisions. **Examples of How to Mature:** Having dedicated bandwidth from the UX/UI team (or UX/UI staff that sits on the experimentation team) for research and translating test hypotheses into wireframes is the best way to improve maturity in this area. Whether or not you already have this dedicated resource, you should establish processes for how your two teams can best collaborate so you can hit the ground running and work in lockstep together.



Training

Why It's Important: It is critical to ensure that everyone in your organization is fully versed in experimentation principles, not just to support experimentation efforts but to foster a culture of experimentation. Without the proper skills and knowledge in place, you won't be able to uplevel your testing efforts and continue moving your business forward.

What It Is: Training can cover many different elements of your experimentation program, from learning how to use a testing tool to understanding statistical significance thresholds. For organizations in the earlier stages of maturity, you might only have a few individuals with experimentation knowledge who are still in the early stages of the learning process. As these individuals become more knowledgeable, they should hold regular training sessions on experimentation principles with the goal of various teams across the organization being able to run tests.

Examples of How to Mature: Educating your organization on experimentation is the best way to become more mature in this area. Of course, this starts with hiring more people who are knowledgeable of experimentation or providing your current employees with opportunities to learn about experimentation (perhaps through CXL's CRO minidegree). Once you have people with robust experimentation knowledge in your company, you'll need to break down any silos across teams, hold regular training sessions, and continually foster a strong culture of experimentation.

People & Skills: How We Can Help

Speero by CXL

Speero not only develops and runs experimentation programs but also helps clients embed and optimize experimentation functions within their business. The agency works with medium to large enterprises globally and has offices to support clients across the UK, Europe, US, and Asia Pacific.

Intellimize

At Intellimize, our CRO Maturity Consultants can guide your team in the right direction with educational content and recommendations for your program to help get your maturity to the next level. For those newer to experimentation or those requiring engineering support, our Solutions Engineers can act as an extension of your own team by coding your tests for you.



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You should be very open and transparent about sharing knowledge company-wide about the experimentation program. Once you've created that excitement, use that to your advantage and start educating other teams on how to run tests until you see experimentation happening in every department."



Jocelyn Czerwinski Director of Customer Success Intellimize



Data & Tools

What It Is:

These are the tools used and the data collected to provide visibility into the customer's lifecycle and behavior. This pillar also involves assessing top-of-funnel metrics (e.g. sales leads) as well as long-tail metrics (e.g. CLTV, churn) across research and experimentation efforts.

Why It's Important:

Even with the right strategy, processes, and people in place, your experimentation team can't run a successful program without the right data and tools. Investing in tools for research, testing, and analytics will give your team the data and functionality they need to move the business forward.

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Tool Investment

Why It's Important: A free or trial version of a tool will only get your experimentation program so far, which is why it's critical to secure the necessary buy-in and resources for an experimentation tool (or develop one in-house). Advanced testing tools can help you scale your program by running more complex tests (e.g. server-side tests). While investing in the right testing tool is essential, you also need to ensure that you invest in supplemental tools (e.g. heatmaps, session recording, user testing) so you can enrich your data and continue to uplevel your experimentation program.

What It Is: Investing in testing and research/analytics tools is key to running effective experiments and taking away the right learnings from them. Early on in your experimentation efforts, you're likely using a free or trial version of a testing tool, if you have any tool at all yet. As your organization continues to mature and secures the right leadership buy-in, you'll upgrade to a 'no limits' experimentation tool and analytics tool and begin using supplemental tools to help with further research and data analysis. At the peak of maturity, you'll likely be using a robust internal experimentation tool that allows you to deploy more advanced tests like feature flags and personalization, and measure and validate the entire customer lifecycle from first touch to last.

Examples of How to Mature: One way to mature in this area is to leverage advanced testing tools that allow you to run more sophisticated tests faster and ultimately scale your experimentation program. For example, look at tools that go beyond traditional A/B testing and leverage things like personalization and machine learning (like Intellimize!). And, once you find the right website optimization tool, don't stop there. Be sure to use other research and analytics tools (heatmaps, session recording, etc) in concert so you can both corroborate your data sources and see things from multiple angles, allowing you to more effectively solve problems on your website and improve the user experience.

Why It's Important: If you're not investing in the right tools, then your test complexity can be limited, making it difficult for you to scale your experimentation program. For example, if your testing tool only allows you to run simple WYSIWYG (visual editor) or client-side tests (e.g. button color or copy tests), you'll struggle to run high-quality experiments that impact your business objectives.

What It Is: This activity looks at how tests are physically built and the processes and tools in place to support test building. If you don't have a lot of dedicated bandwidth from your engineering resource or have a limited testing tool (or both), you'll likely rely on a WYSIWYG tool or light HTML to test page changes on your website. As your organization matures and you secure a dedicated engineering resource, use more sophisticated JavaScript, HTML, and CSS to build your experiments, and run more server-side tests to improve the functionality of your site.

Examples of How to Mature: Having both a dedicated engineering resource and the right testing tool is critical to running impactful tests and advancing your experimentation program. If you don't yet have the right resources, start building your processes and strategy to show leadership how upleveling your test execution can further the business.



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If your execution process is constantly stalling out, then you need to be documenting where it's stalling. If you find it's stalling in the same place every time (e.g. pre-test analysis), then that's where you need to go fix that bottleneck."



Lennon Cole Sr. CRO Maturity Consultant Intellimize



Tracking and KPIs

Why It's Important: While tracking the right KPIs for your business is important in testing, accuracy and consistency in your data are crucial. You want to ensure your test data is flowing to your analytics tool (e.g. Google Analytics) and any other supplemental tools (e.g. heatmapping) so you can conduct a deeper post-test analysis. Having this advanced data can help you leverage personalization and targeting so you can further improve the user experience.

What It Is: Conducting a thorough post-test analysisincluding statistical significance calculations and segmentation-allows your organization to see if you've met your KPIs and gain deep insights into your audience. Organizations in the earlier stages of maturity will likely only look at their results within the testing tool's reports or Google Analytics. As you mature in this area, start looking at a corroboration of data sources (e.g. your testing tool's dashboard, Google Analytics, and heatmapping) in your post-test analysis to track micro conversions (e.g. clicks), macro conversions (e.g. demo requests, purchases), and CLTV. **Examples of How to Mature:** There are many ways to improve your maturity in this area, but perhaps the simplest way to get started is to integrate your testing tool with your analytics tool(s). If you don't yet have supplemental tools like heatmapping, show leadership the value of this data source (and corroborating data sources in general) to try and secure their buy-in. You can also mature here by hiring dedicated data analysts on your experimentation team and looking at the full customer lifecycle in your analysis. Your dedicated data analysts should work to standardize your reporting by building a reporting dashboard that outlines the metrics and insights that really matter to your business, all of which will make it easier for you to continue showing leadership the value of experimentation.



Research

Why It's Important: While staffing your team with skilled UX/UI professionals is critical, they need to have the right data and tools available to them to properly conduct research and inform tests.

What It Is: When conducting research to guide your experiments, your organization should leverage both qualitative (e.g. customer surveys, user testing) and quantitative data (e.g. analytics). Before you have any dedicated UX/UI resources, you might look at what your competitors are doing and/ or reference best practices when conducting test research. As you have more UX/UI resources available to you, you should collect both qualitative and quantitative data while also leveraging existing data sources within the company (e.g. live chat and customer support logs, sales call recordings) to inform your tests. At the peak of maturity, the experimentation and UX teams should be fully integrated with one another, and you should have a robust stack of quantitative and qualitative data that provides an understanding of the entire customer journey.

Examples of How to Mature: If you don't yet have available UX resources, you can still mature in this area by leveraging existing data within your own organization (e.g. by speaking with your customer support and sales teams, or reviewing chat logs or customer surveys). If you have a UX team in your organization, you should prioritize building a relationship with them and securing a dedicated amount of bandwidth for your experimentation program. Of course, having the right research tools (e.g. heatmaps, session recording, polls) can help you and your UX team collect the robust data you need to inform your tests and optimize your website.

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Best choices are made in perfect contextual awareness. As we all know, perfect awareness can not be achieved. The next best thing? Data-driven decision making that maps out the context you are in and gives you a clear way toward achieving your goals."



Edgar Špongolts Director of Product

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Knowledge Base Creation

Why It's Important: Having a consolidated repository of your experimentation learnings not only helps to inform your roadmap moving forward but also allows the rest of your organization to review the test insights that matter to them. A transparent and accessible knowledge base can go a long way in fostering a culture of experimentation and evangelizing your program.

What It Is: The insights you generate from your tests are invaluable, which is why you want to create and maintain an established log of past experiments and their results. At the earlier maturity levels, your organization either has no log of past tests or a log that is not regularly maintained. As you mature, you should have an established experimentation log that is updated through automation and has various tags (e.g. winning tests, tests with the most learnings) and views (e.g. Gantt chart, kanban) so employees can easily navigate the log and look at the insights and metrics they care about. **Examples of How to Mature:** The key to maturing in this area is to establish and maintain an experimentation log that aggregates all of your insights from research and test results. You can continue to mature by making sure the log is updated regularly, easily accessible to the rest of your organization, and has robust tags and views, thereby making it easy to navigate so people will be more inclined to use it and get the value out of it.

Data & Tools: How We Can Help

Speero by CXL

With the drive to elevate experimentation as the leading mechanism for growth, Speero partners with client teams to optimize and maximize the value of their programs through better systems, processes, data, and in-house skillsets.

Intellimize

Intellimize is a machine learning-based website optimization solution that allows you to personalize each individual visitor's experience. In doing so, Intellimize allows you to track and optimize for all of the metrics that matter to your business. We also integrate with outside analytics tools and ingest data from other sources so you can get the full picture of your audience (e.g. firmographic/demographic data, behavioral data, contextual data) and your test performance.



Conclusion

No matter how mature your organization currently is, there is a constant opportunity to learn and iterate on your experimentation program. Advancing your experimentation maturity is an ongoing process, and continuously optimizing not just your website but your entire experimentation program is paramount-and, even then, it's not quite that simple.

Whether you're at the Beginner or the Strategic level, there may be certain pillars or activities where you have room for improvement. Here are some tips to keep in mind as you seek to improve your experimentation maturity.

- Have a deep understanding of where your experimentation maturity currently stands and where you have room for improvement
- Make sure you involve and interact with stakeholders across your organization to maintain excitement for experimentation and get more buy-in
- Always, always, always make sure your experimentation program is supporting the growth and KPIs of the business
- Collect the right quality and quantity of data to make sure you're actually solving customer problems and improving their experience (rather than just 'guessing' as to how you can help them)
- Build the processes you need to better manage everything from hypothesis generation to data analysis, and also ensure you set up governance to make sure your processes are followed and work for your organization

Be curious above all else

How Mature Is Your Experimentation Program?



Now that you have a deep understanding of the different levels and pillars of maturity, you're probably wondering, "how mature is my experimentation program?"

Don't worry, you don't need to go through each activity in this eBook and try to rank yourself. Let us do the scoring for you when you fill out the **Speero Experimentation Program Maturity Audit**. This assessment will help you identify any gaps or areas for improvements in your experimentation program so you can be on your way to progressing through the levels of maturity and driving meaningful business results.*

*Please note that optimal experimentation maturity varies based on different organizational sizes and types.





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Lennon Cole Sr. CRO Strategy Consultant Intellimize

Experimentation is a methodical and logical way of knowing whether or not we're making something better. Of course, the first order of business is to determine what 'better' might look like; only then should we conduct thoughtful research, generate data-backed hypotheses, and put our ideas to the test. And, to do all of this well, you need the right processes, people, and tools in place. Without them, you'll struggle to understand whether your experiments are effective and *why* they are or are not effective.

This is why it's critical to progress through the levels of experimentation maturity.

By moving through the levels of experimentation maturity, you're going to conduct better experiments, get better learnings, and get ahead of where other people are in the market. You'll be right up there with your toughest competitors-if not ahead of them-because your company is focused on consistent, data-led improvement. And if you can make that process of improvement as efficient and as widespread as possible throughout your organization, you'll impact key business objectives like customer retention and lifetime value. Here are a couple of key takeaways I encourage you to keep in mind as you aim to build a more mature experimentation program:

1. Rely on data first and foremost. We tend to have a bias toward our own ideas, especially when it comes to guessing what other people will like. So the more we can rely on the data to guide us (and be humble in the face of it), the better outcomes we'll achieve.

2. Remember that there's not an end goal. Even if you've reached the highest level of maturity, there will continue to be room for improvement. To truly have a successful experimentation program, you must be curious above all else and constantly willing to refine your processes.



Edgar Špongolts Product Director

8 years ago I was a novice CRO analyst at CXL. I was really excited to see the growing impact of data-driven optimization. It seemed a panacea for all businesses. The more I worked in the field, the more I realized that doing just CRO and not including the adjacent functions surrounding CRO, kneecapped the entire CRO process. For me, it was clear that we should also be considering and working with acquisition, product development, and analytics to get better results for the business. Each time I presented this approach in client calls, most people were scratching their heads and either not understanding the need or citing reasons why they couldn't do it. This is when I realized I had a revolutionary approach that seemed like common sense to me but not to the vast majority of clients and the market at large.

As a data-driven person, I obviously started with research and quickly found out that there are tons of "oven-ready" frameworks out there that promise instant business success if you use the given template. And of course, the consultancy scene was brimming with "we start as low as \$1,000,000" type digital transformation offerings. It all felt rather needlessly arbitrary, complicated, and overpriced. This was the turning point; this was when we boiled it back down to the basics to reimagine CRO. We all strive to do better. And to be better we must first define "better" and then understand how to get there. That's what Experimentation Maturity [XMAT] is all about; and this simple process of becoming better can be broken down into three key steps:

- **(Re)define "better"** Understanding your goals is crucial. But it's even more important to have goals that are firmly connected to better results for your entire organization. Ensuring your goals are aligned across the business has a huge impact on the outcomes. This minimizes unhealthy internal rivalry and galvanizes the efforts of the whole organization to create synergy.
- Set processes and feedback mechanisms Goals are great and unify the business, but if you don't have a clear understanding of the individual components of each goal, then you're not maximizing the use and impact of goal-setting. Make sure that all functions within these sub-components of each goal have a fast, a clear and efficient feedback loop for the role in question, and will allow for short cadence decision making for that position/decision-maker.
- **Measure the impact** Everyone within the organization should be aware of how their work is influencing the organization. Everyone from the CEO to the janitor will have goals and milestones to hit and performance indexes to monitor. These metrics provide an understanding of each area of performance, the impact, as well as how the role could be conducted better.

And there you have it. A perfectly transparent system of goals, processes, and measurements that enables quick decisionmaking based on solid data for all parties involved. What more can one desire when trying to do better?



Jocelyn Czerwinski Director of Customer Success Intellimize

Experimentation is not just a tool to test your website but a state of mind.

It's aligned with the idea that what worked yesterday, may not work today, and if that's true, then trying new things is the only way to keep the business moving forward.

Experimentation is also not just for one person or one team. It's not a random or irregular occurrence or a theme for one quarter. For it to work-for it to really work-the entire organization needs to be on board and it needs to be an integral part of how the business operates on a day-to-day basis.

That's why leadership buy-in is critical. From the top-down, there needs to be a mindset that you're curious, you're iterative, and you're experimenters at heart. Perhaps this is even highlighted in the company values. Leadership needs to believe that experimentation is the vehicle to learning, to improvement, to meeting and beating business goals. Going hand in hand with experimentation is the mindset that it's okay to fail. Leadership must embrace and normalize this. Failure is inevitable. If you're failing, that means you're trying. It means you're getting closer to what will work, and in the process, you'll learn-and you'll learn faster than if you didn't go through the failure. By experimenting, failing, learning, improving, and winning-and continuously going through this cycle-you'll be better able to serve your customers and scale the programs and processes that help you do so.

When this is embraced, you'll see experimentation happening in every department, every sub-team, and within every individual's area of responsibility. Employees will start to evangelize experimentation just through their normal day-to-day interactions. It'll be natural and even expected to hear about the progress and results of experiments happening in every nook and cranny of the company, whether reported at a high level in an allhands meeting, shared in a thread in a specific Slack channel, or deeply discussed in a 1:1. Sharing ideas, sharing learnings, sharing data and insights, sharing new approaches, sharing wins. In job interviews, leadership and other employees should vet and hire for an experimentation mindset in candidates, and when candidates ask experimentation-focused questions, employees should be able to answer them authentically and with ease, perhaps eagerly sharing a story or two.

By applying an experimentation mindset to everything you do, you'll progress through the levels of experimentation maturity to achieve more learnings, more wins, and more growth for your business.