Optimizely Experimentation Strategist

Reference Material for the 2023 Optimizely Experimentation Strategist Certification Exam
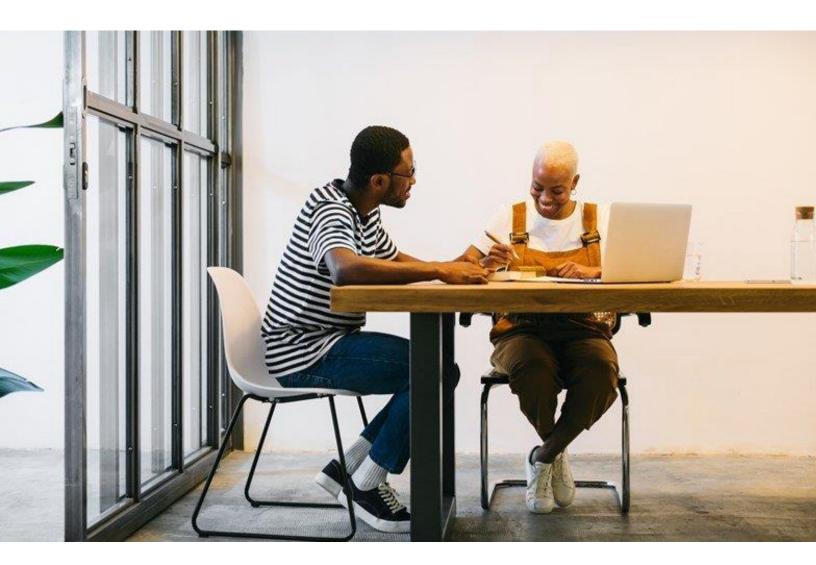
Introduction

This reference guide is meant to help you in your goal to become a certified Optimizely Web Experimentation Strategist. It contains centralized links to key Optimizely documentation that aligns with what is being measured on the certification exam.

Each topic on the certification exam is outlined in this guide with links to documentation to help you review, learn and prepare. The full content outline as well as other exam details are available in the Experimentation Strategist Certification Exam Guide.

It is important to note that this reference guide is ancillary support for knowledge that you should already have as a practicing Strategist. You should have prior exposure to the product and knowledge through a combination of previous Optimizely training and hands-on experience with the Web Experimentation product.

Reference Links

Table 1 includes links to resources that are aligned to each of the content areas on the Experimentation Strategist certification exam. Table 2 includes additional general resources not aligned to particular content areas.

As of September 2022, the Optimizely Education team is in the process of migrating to a new website and Optimizely Academy. While we update our information and links about **instructor-led training courses** applicable to this course of study, please email education@optimizely.com with any questions or for more information.

Table 1. Resource links outlined by exam content area.

Managing the Experimentation Program		
Team Structures	Role definition	Build an effective optimization team
		Manage team permissions in Optimizely Program Management
		Manage collaborators in Optimizely Web
	Alignment of roles to product needs	Enabling experimentation at your organization: Determining your team structure
Governance Models	Business level initiatives	Consider boosting your program with an Optimizely Solutions Partner
	Gap analysis and discovery	https://en.wikipedia.org/wiki/Gap_analysis
	Project plan	Guide your program with an experimentation charter
		Site redesigns: Test through the design process
		Create an advanced experiment plan and QA checklist
Goals & Metrics	Goal identification and alignment to business objectives	Common metrics by revenue model
		Primary and secondary metrics and monitoring goals
	Measuring output and efficiency of program	Improve metrics that matter with your optimization program

	Goal trees (alignment tools)	
	KPIs	[How to maximize KPIs with input metrics](#)
Communication	Develop coaching and communication models	[5 Ways to Gain Greater Visibility for Your Experimentation Program](#)
	Results sharing and communication	[Share your results with stakeholders](#)
		[The Experiment Results page for Optimizely](#)

Experimentation Design		
Experimentation Overview	Explain the lifecycle of an experiment/campaign (optimization methodology)	[The Optimization Methodology: Run a high-impact optimization program](#)
		[Get started with Optimizely Web Experimentation](#)
	Iteration strategies	[Iterate on campaigns and share results in Personalization](#)
Experimentation Ideation	Identifying customer problems through data	[Use a business intelligence report to ask the right questions](#)
		[Design an effective hypothesis](#)
	Indirect and direct data types	[Generate ideas for experimentation using indirect data](#)
		[Generate ideas for experimentation based on direct data](#)
	The hypothesis framework	[Basic: Use analytics reports to generate hypotheses](#)
		[Design an effective hypothesis](#)
	Experimentation brainstorming	[Best practices: From research to hypothesis creation](#)
		[Basic: Use analytics reports to generate hypotheses](#)
	Using a heuristics ideation approach	[Advanced: Use analytics reports to generate hypotheses](#)
Experiment Design	Setting a sample size for prioritization	[A/B test sample size calculator](#)
		[How to use the Optimizely Sample Size Calculator](#)
		[How long to run an experiment](#)

	Building a strong test plan (metrics, pages, audiences, and success criteria)	[Get started with Optimizely Web Experimentation](#)
		[Create a basic experiment plan](#)
		[Create an advanced experiment plan and QA checklist](#)
	Defining primary and secondary metrics for an experiment	[Create a metric in Optimizely Web](#)
		[Edit a metric in Optimizely](#)
		[What's the difference between events and metrics](#)
		[Common metrics by revenue model](#)
		[Primary and secondary metrics and monitoring goals](#)
		[Track macro and micro-conversion events](#)
Roadmapping & Prioritization	Tools to build roadmaps and test plans	[Create an experimentation roadmap](#)
	How to use different prioritization methodologies (e.g., PILL, PIE, PXL)	[Create a basic prioritization framework](#)
Experiment Types	Determine test type based on criteria	[Experiment Types: AB, Multivariate, and Multi-page](#)
	A/B, A/B/n testing	[Create a basic experiment plan](#)
		[A/B testing](#)
	Multivariate testing	[Multivariate tests for Optimizely](#)
		[Experiment Types: AB, Multivariate, and Multi-page](#)
	Personalization	[Strategy essentials: Personalization](#)
		[Seamless experimentation: Test and personalize together](#)

		Inspiration for Personalization
		Build Experimentation-in-Personalization campaigns
		Optimizely Web Personalization Resources
		Get started with Optimizely Web Personalization
Advanced Strategies	Multi-Armed Bandits and the Stats Accelerator	Multi-armed bandits vs Stats Accelerator: when to use each
		Maximize lift with multi-armed bandit optimizations
		Stats Accelerator—The When, Why, and How
	Multi-Page/Funnel Tests	Optimize your funnels in Optimizely
		Create multi-page (funnel) tests in Optimizely Web

Experiment Results Interpretation		
Statistical Principles	Optimizely's Stats Engine in the industry	How Stats Engine calculates Optimizely Results
		Stats Engine Resources
		Why Stats Engine results sometimes differ from classical statistics results
	False discovery rate control	Why Stats Engine controls for false discovery instead of false positives
		https://support.optimizely.com/hc/en-us/articles/4410283967245-False-discovery-rate-control False discovery rate control
	Interpreting statistical significance	Why is my experiment failing to reach statistical significance?
		Statistical significance in Optimizely

		[Stats Accelerator—The When, Why, and How](#)
		[Get to statistical significance faster with Stats Accelerator](#)
		[Run and interpret an A/A test](#)
		[Change the statistical significance setting](#)
		[Stats Engine: How and why statistical significance changes over time](#)
	Minimal detectable effect (MDE)	[Use minimum detectable effect (MDE) when designing an experiment](#)
		[Use minimum detectable effect to prioritize experiments](#)
	Confidence intervals	[Confidence intervals and improvement intervals](#)
	Visitors remaining vs. sample size	[Take action based on the results of an experiment](#)
Results & Interpretation	Drawing actionable insights from experiment results	[The Experiment Results page for Optimizely](#)
		[Take action based on the results of an experiment](#)
	Deciding when to stop an experiment	[How long to run an experiment](#)
		https://support.optimizely.com/hc/en-us/articles/4410283994509 [Send all traffic to a winning variation](#)
		[Data Retention Policy update and FAQs](#)
	Segmenting results to drive deeper insights – interpret graphs	[Segment your results in Optimizely Web](#)
	Communicating wins, losses, and inconclusive results	[Share your results with stakeholders](#)
		[Iterate on campaigns and share results in Personalization](#)

Optimizely

Experimentation Platform		
Account Configuration	Account hierarchy (account, Project, etc.)	[Access the Account ID and Multi-account login in Optimizely](#)
	Understanding the Project Snippet	[Implement the one-line snippet for Optimizely Web](#)
		[Optimizely Web snippet: One line of JavaScript to run Optimizely Web on your site](#)
	Setting up Collaborators	[Manage collaborators in Optimizely Web](#)
		[Collaborate efficiently with Concurrent Editing](#)
	General platform layout	[Six steps to create an experiment in Optimizely Web](#)
	Implementation and integration	[Analytics integrations](#)
		[Integrations](#)
		[Checklist: Implement Optimizely Web](#)
		[Best practices: Organizing experiments and campaigns](#)
		[Checklist: Advanced implementation for Optimizely Web](#)
Experiment Components	Pages (URL Match, Element is Present, JavaScript Condition)	[Prepare Optimizely Web for your site](#)
		[Activate pages in Optimizely](#)
		[Pages: Choose where experiments and campaigns run](#)
	Events (Click, Pageview and Custom Events)	[Events: Tracking clicks, pageviews, and other visitor actions](#)
		[Set up events in Optimizely Web](#)
		[Custom events in Optimizely Web](#)

		Manage events in an Optimizely Web project
		Set up multiple revenue tracking events
	Audiences	Audiences: Choose which visitors to include
		Set up audiences in Optimizely: Audience Builder
		Audience conditions: Descriptions and examples
		Build interest-based audiences with adaptive audiences
		Optimize based on Paid Ad Campaigns or SEM
	Attributes	Custom Attributes: Capture visitor data through the API in Optimizely
		List attributes vs table attributes: Use cases and features
		Set up list attributes
Building an Experiment	Targeting pages	URL targeting in Optimizely: Choose where your experiment runs
		Alternative to pages for URL targeting in Optimizely
		Set up a page in Optimizely Web
		Pages: Choose where experiments and campaigns run
	Choosing and prioritizing metrics	Metrics in Optimizely
		Primary and secondary metrics and monitoring goals
		Types of metrics and when to use them
		Use cases for the total value metric

		[Bounce rate and exit rate metrics](#)
		[Common metrics by revenue model](#)
		[Total value and other numeric metrics](#)
		[Add bounce rate or exit rate metric to an experiment](#)
	Setting traffic allocation and distribution	[Change traffic allocation and distribution in Optimizely](#)
		[Mutually exclusive experiments in Optimizely Web](#)
	Visual and Code Editors functionality	[Visual Editor in Optimizely](#)
	Quality Assurance (QA) Methodologies	[The Optimizely Chrome extension](#)
		[Install the Optimizely Desktop App](#)
		[QA: Cross Browser Test](#)
		[QA: Share draft variations or experiences](#)
		[Create an advanced experiment plan and QA checklist](#)
		[Set a test cookie: Preview a live campaign or experiment](#)
		[Troubleshooting: No traffic in an experiment](#)
		[QA in Optimizely Experimentation](#)
	Launching the Experiment	[Launch and monitor your experiment](#)
		[Schedule experiments and experiences](#)
		[What is the difference between publish, start, and pause?](#)
		[Changing an experiment while it is running](#)
	Viewing experiment results	[Interpret your Optimizely Results](#)
		[How Optimizely counts conversions](#)
	Implementing Multi-Page Funnel Tests	[Create multi-page (funnel) tests in Optimizely Web](#)

Table 2. General experimentation resource links.

General Experimentation Strategist Resources		
General	Self-paced online Experimentation courses (free)	[Getting Started with Optimizely Experimentation](#) [Getting Started with Optimizely Experimentation](#)
	OPTIPEDIA Optimization Glossary	[OPTIPEDIA Optimization glossary](#)
	Optimizely Terminology Glossary	[Glossary of Optimizely terminology](#)