Adobe Target

A Guide for Marketing, Business, and IT Professionals

CLASSROOM IN A BOOK®
The official training workbook from Adobe

Brian Hawkins and Lily Chiu-Watson

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Adobe® Target Classroom in a Book®

ACKNOWLEDGMENTS

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GETTING STARTED

If you're reading this book, you probably have a vested interest in Adobe Target. Maybe your organization just purchased it and you are preparing for its implementation. You may have started a job and your new employer uses Target. Perhaps you are leading a team tasked with evaluating a purchase. Or you could already be familiar with Target and want to deepen your knowledge.

Whatever prompted your interest in Target, you should be excited about its testing and optimization features because they allow your organization to make significant impact to key success events and increase your knowledge of your digital consumers.

This book describes the value of Adobe Target for a marketing team—more specifically, a digital marketing team. It describes technology-agnostic challenges that digital marketers face and then explains how Target can help you address those challenges.

If you've worked with Adobe technology, you're probably familiar with the Classroom in a Book series. This book, however, is an atypical Classroom in a Book. You won't find step-by-step directions that explain how to use each and every feature of Adobe Target. Instead, our goal is to help you understand the business value of Target's features so that you can evaluate if and how you may want to use them.

We structured the book in this way because organizations can approach testing using a wide range of execution and prioritization strategies. Adobe Target is an enterprise technology platform that enables organizations to run tests of static and dynamic webpages, on mobile devices and applications, within emails, and as part of display ads. These tests can also be targeted to very specific segments of traffic that you pre-define or define based on testing results. No matter what the scenario or the digital property, Adobe Target can enable your organization to execute marketing strategies in a very timely manner.

At the end of this book, you will be prepared for your role as a marketer who can supervise Adobe Target tests and real-time reporting. You will be able to assemble an actionable plan that applies Adobe Target to accomplish your digital marketing goals. You'll be able to make technical decisions with an implementation partner. Lastly, you'll probably be fired up about how Adobe Target can transform your marketing organization.

Who is this book for?

We wrote this book for the marketer and for the information technologist, although we generally refer to you as a marketer throughout the book. That general term could include a chief marketing officer, web writer, copy editor, digital marketing manager, information architect, developer, coder, designer, or any number of other job titles.

We deliberately made the assumption that you are reading this book *before* working through your first digital tests or making your first enterprise testing solution purchase. However, the book will also have value for marketers who are experienced in using Adobe Target. Working through the implementation and execution of tests is the best way to learn the platform, and exploring Adobe Target through that implementation lens is the best way to become more skillful with it.

Target has also attracted a growing, loyal community of technologists, programmers, and system administrators who are passionate about what it offers. If you are a member of that group looking for tutorials on how to code JavaScript or how to construct server-side offers for use within tests, you generally won't find those here. This is not a book for the techies.

It's primarily a book for marketers, even though this book often bridges the marketer-techie gap. The book does include some code, but only code that is absolutely fundamental. If as a marketer you can understand the technical fundamentals, you will be much better prepared to execute and understand what Target can do for you and your company.

That said, this book does have value for technical folks who are interested in learning the platform and increasing the efficiency of their Target implementation. If you want to be great at technically implementing Adobe Target, you *need* to understand the marketing context in which it operates. Why would you put Adobe Target on key pages? Why would you make that integration to SiteCatalyst? All the programming or administration tasks you might undertake are rooted in the marketing needs that this book will help you understand.

What's in the book?

Adobe Target is incredibly flexible because it provides many ways to approach the same scenario or issue. This book will lay the groundwork to help you understand the mechanisms available and how to choose the ideal solution.

Part 1: Understanding Adobe Target

The first section of this book explains why Adobe Target is important to you. You'll look at the following general topics:

- The state of optimization and testing today
- Best practices for test execution, test prioritization, and communication of test results
- The implementation approaches that are available to your organization
- Key terms used within Adobe Target
- Debugging techniques and workflow demonstrations

If you know very little about the platform or about Adobe's vision for digital marketing technology, this section is for you. The rest of the book builds on the concepts discussed in this section.

Part 2: Executing with Adobe Target

Part 2 goes to the nuts and bolts of Adobe Target. You'll learn the business values of its basic features:

- The types of tests that are available and why you would choose one over the other
- How Adobe Target is able to provide near real-time reporting
- The data available within the reporting interface
- Segments and how to use them within Adobe Target to increase the value of your testing efforts
- Built-in targeting capabilities and how to make them most relevant for your business
- Best practices for evaluating test results and basing a decision on the data produced by each test

This section describes the features of Adobe Target but doesn't include step-by-step directions. After reading this section, you should understand all of the basic Adobe Target functionality and why it can be valuable to your marketing organization.

Part 3: Optimizing Adobe Target

Part 3 looks at the Adobe Target functions that set it apart from its competition. You'll discover how to optimize your content to create incredible web experiences for customers. This part explores the following issues:

- How to leverage Adobe Target profiles to bring your testing efforts to a higher level

- User management and security management

- Managing tests and testing ideas

- Adobe Target 1:1 and how these solutions can best leverage the same implementation of Adobe Target

- How tag management systems can solve for key testing issues or problems and help bridge Target to other internal and external data sets for advanced targeting and segmentation

After reading this section, you'll understand what sets Adobe Target apart from other systems. You'll also know how to build dynamic, effective tests that will directly impact your key success events and allow you to learn from your digital consumers.

About the screenshots

Adobe Target has undergone some significant changes over the last year, and much more change is coming. The images in this book highlight both the new and old interfaces to help organizations that are using new installations along with legacy systems.

About Classroom in a Book

Adobe Target: Classroom in a Book is part of the official training series for Adobe digital marketing software developed with the support of Adobe product experts. The content is designed so you can learn at your own pace. If you're new to Target, you'll learn the fundamental concepts and features you'll need to use the program. *Adobe Target: Classroom in a Book* also teaches many advanced features, including tips and techniques for using the latest version of this application.

Prerequisites

Before using *Adobe Target: Classroom in a Book*, you should have a working knowledge of the technology of the web, such as how websites are constructed. The book assumes basic understanding of HTML-based webpages, web analysis, basic information technology concepts, and digital marketing.

Additional resources

Adobe Target: Classroom in a Book is not meant to replace the Target documentation available online or to be a comprehensive reference for every

feature. For comprehensive information about program features and tutorials, please refer to these resources:

Official Adobe Target documentation

http://microsite.omniture.com/t2/help/en_US/tnt/help/?r=target&f=home

The official Adobe Target documentation contains detailed descriptions of almost every feature in the platform. It also includes information specifically aimed at programmers, marketers, system administrators, and managers. This documentation site is frequently updated and does a nice job of helping readers understand key functionality that is added to Adobe Target in the form of updates.

The blogosphere

There is a *ton* of great Adobe Target content on the web. The community of developers, marketers, and other professionals who are passionate about Adobe Target is growing quickly. It seems that every day new blogs and Twitter accounts are popping up. Sometimes simply searching online for the information you need is the best way to go. You may even find a few of author Brian Hawkins's blog posts about Adobe Target at http://brian.webanalyticsdemystified.com and http://blogs.adobe.com/digitalmarketing/author/brian-hawkins.

1 ADOBE TARGET AND OPTIMIZATION TODAY

If you've picked up this book, you are likely in marketing or in information technology (IT), and you want to learn more about how digital testing can reshape your business using the market-leading digital testing and optimization software Adobe Target. This book details the concepts within the software, and for IT professionals, describes the best practices for Target implementation and performance.

This book also bridges the gap between IT and marketing because marketers who are familiar with technical concepts are that much more successful in creating a culture of optimization within their organization.

In this lesson, you'll learn:

- What testing is and how it can impact key success events on your digital properties
- How testing is just a component of a broader optimization concept
- Key concepts and terms used within Adobe Target
- Best practices for testing and adopting a culture of optimization

By the end of this lesson, you'll be better prepared to incorporate and expand testing at your organization.
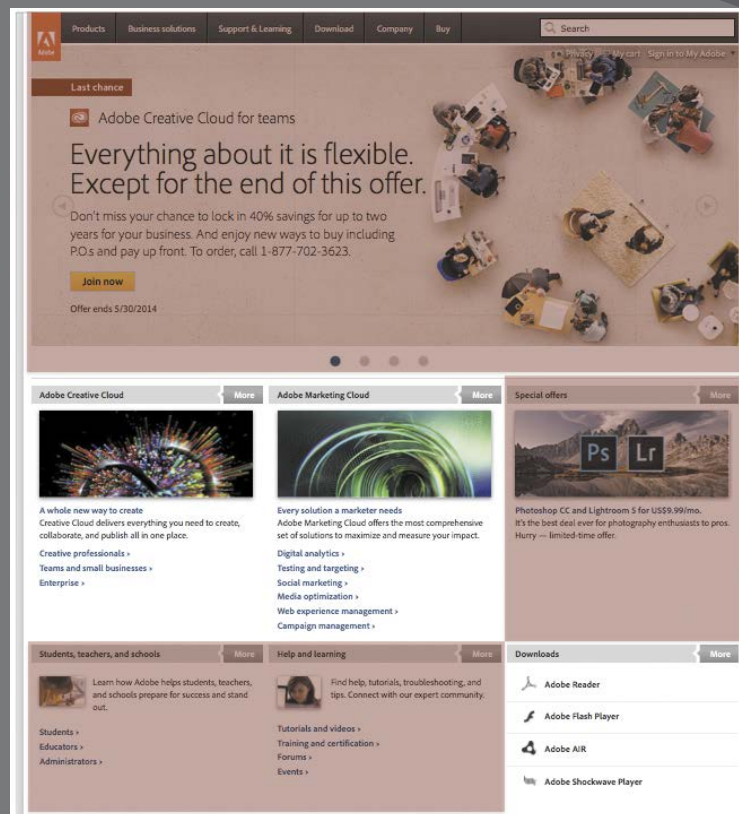
Adobe Target allows you to deliver customized content to targeted customers.

What is testing?

Testing can mean many different things and is usually confused with the application or server testing executed by IT teams (because, historically, that was the full extent of testing for most organizations). That narrow definition has since expanded, as marketers are now also testing ways to present their digital content to ensure that consumers have ideal experiences. Testing can reshape a business and provides significant returns on their testing investments in technology but also in human capital. At its most basic level, testing driven by marketers presents different experiences to different visitors and monitors which experience performs the best across all visitors. **Figure 1.1** shows a simple example of an A/B/C test. Visitors are randomly presented with different pieces of content on a page, in this case, the home page hero. As visitors arrive on the page they are randomly presented with "gray," "red," or "green" content (representing three different approaches to motivating a user response). The yellow triangles are simply representative of the additional content on a page that is not part of the test. Marketers are then able to evaluate which of these versions most effectively influence any and all success events on the site.

Figure 1.1
A basic test example of an A/B/C test on a single page
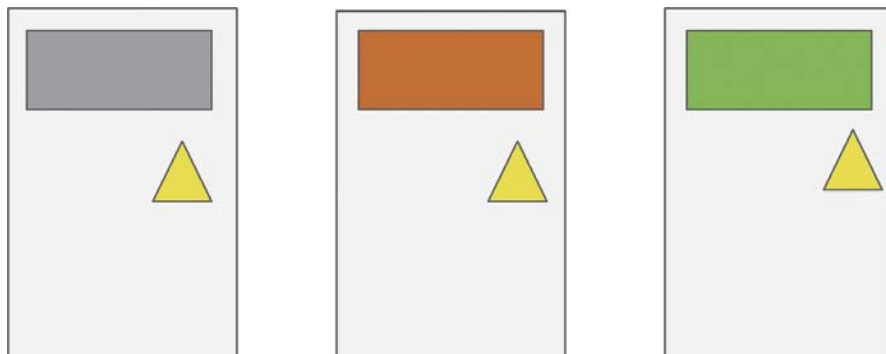
In this very basic example, we can see if various pieces of content cause visitors to react differently. Some of the test variations may lead to increases in engagement (e.g., click-through or time on site) or yield different success events, such as making a purchase, registering, or signing up for something, or any other action that the visitor can do on the site.

Although this is a simple A/B/C test example, this book will cover multiple testing types available to Adobe Target users. The test type you choose will be determined by the strategy behind your test or the type of data you want to extract from the test results.

Testing capabilities within Adobe Target are quite advanced. Many organizations use Adobe Target to perform dozens, if not hundreds, of tests simultaneously. Tests can be executed across any digital property including emails, display ads, mobile sites, and even mobile apps. When you think about all the possible webpages that

organizations have on their website alone, and then couple that with the testing opportunities across all other channels, you can easily see that the potential scale of testing is vast.

This book will also detail the targeting capabilities within Adobe Target. Targeted tests offer some of the greatest strategic potential in terms of learnings and return on investment. Organizations around the world are targeting tests to specific geographic locations, acquisition sources (such as paid search), and previous behaviors on the site. Those targeted tests are generating incredible returns that are capturing the attention of key executives within the organizations.

You'll also learn about reporting and collating the data generated by tests. Adobe Target users will quickly find themselves exposed to incredibly large amounts of data for each test. This book will help you understand how to best use that data. Additionally, you'll understand the key statistical concepts that will help you analyze test results and gain expertise in choosing test winners and losers.

An organization's testing efforts should not live in a silo. Test results need to be communicated throughout the organizations, and so we will spend some time addressing integration between analytic solutions such as Adobe SiteCatalyst and best practices for communicating test results.

Testing is a broad concept that has the ability to change a business. However, testing is just the mechanism to execute quantifiable experiences for multiple visitors at the same time. Testing is just another tool with which an organization can develop a culture of optimization.

What is optimization?

Optimization is the *ongoing, data-driven process of continually discovering and quantifying* the most effective experience for your customers and prospects, both offline and online.

The only way organizations can provide the most effective content and experiences to their customers and prospects is through testing and quantification. This process of discovering what works best for your customers is ongoing as more data and learnings present themselves. Testing solutions enable optimization and help organizations instill that culture of optimization.

Why optimize? What are the goals of optimization? The most successful organizations have adopted a culture of optimization because it:

- Enables organizations to deliver and quantify personalized experiences
- Allows organizations to clear the path to conversion and enable the ability to find the most efficient and beneficial path

- Increases the return on investment from any and all acquisition initiatives, simultaneously reinforcing and quantifying the reinforcement of source messaging across all channels

- Saves time and money by quantifying the value of building and incorporating new functionality by testing features before devoting expensive resources to them

- Makes the most cost-effective use of internal and external data providers

- Enables the building of relationships with their consumers

- Allows organizations to quickly and efficiently respond to consumer needs and wants, thereby enabling an agile environment

- Realizes a competitive edge

- Provides mechanisms to quantify the value of delivering the right experience at the right time across any and all cross-channel success events

- Not only generates more profits, but also generates learnings that can be applied offline or online for future endeavors

Optimization requires significant resources from analysts, content developers, project managers, and to varying degrees, IT. Organizations must also put robust processes in place to support optimization efforts, which can include test intake and output processes, coordination with content developers, operationalizing test winners, and incorporating learnings across the organization.

Organizations that have invested in resources and implemented optimization processes have found it incredibly worthwhile in both net learnings and bottom line results. The most successful organizations see tens of millions of dollars from their test results. These same organizations also see significant savings by testing new strategies rather than just defaulting to some content that may negatively impact their business.

Building a culture of optimization takes considerable time. Talented analysts, inspired marketers, data-driving content developers, and an effective and versatile testing tool are key to making this happen. Organizations need to select the testing tool that helps them get up and running with testing and sets them up for long-term success with operational best practices.

Adobe Target: Key concepts that enable testing

Adobe Target is designed to make testing and adopting a culture of optimization straightforward and scalable. The key concepts that inform Adobe Target allow

you to make the most of developing and testing solutions. In this section, we'll provide a high-level overview of the key concepts that you'll explore in detail later in the book.

The mbox

The *mbox* is short for "marketing box" and the next lesson is completely devoted to it, as befits its importance within Adobe Target. The mbox is the mechanism by which Adobe Target presents multiple, different experiences for visitors. The mbox is a JavaScript tag placed on the website that causes a webpage browser to makes a call to Adobe's cloud network servers. Those servers respond to the mbox call by delivering content to the webpage based on the test design or anything else the tester has set up within Adobe Target.

The mbox is also a conduit of data in that it can communicate key data points to Adobe about the visitor who is seeing the mbox. This data transfer is the mechanism by which Adobe Target can provide its targeting capabilities. For example, if you click a paid search ad from Google and arrive on a landing page with an mbox on it, the mbox makes its call to Adobe, tells Adobe Target that this visitor came from Google, and provides the query term that they used to reach the ad. All of this is incredibly rich information for Adobe Target users because they can enable tests targeted to this particular traffic segment. At the same time, the visitor's privacy is maintained because the data collected is anonymous and not personally identifiable.

Communication between the website and Adobe Target can be managed by implementing a single line of JavaScript at the top of a page that fires an mbox or by wrapping specific areas of content on the page in mboxes.

Activities

Activities are a relatively new concept within Adobe Target and are used to show content to visitors as part of a targeted test or to push content to 100 percent of visitors. Activities are formally known as *campaigns*, and both terms are often used interchangeably in documentation and across industry conferences.

Here is a helpful way to think about activities: If you, as an Adobe Target user, are running an A/B test, you are running an A/B activity. If you are targeting content to previous purchasers, for example, you are also running an activity. Activities represent the presentation of experiences based on rules configured within Adobe Target.

Several types of activities are available within Adobe Target. The test design and the desired data from the test will help determine the ideal activity type to choose for a test.

Experiences

Simply put, experiences represent the multiple alternative treatments presented to visitors. If you are running an A/B test, you have two experiences. Experience A would typically represent the control group for a test, and Experience B would represent another possible experience based on the test designs. While the statement above refers to an A/B test with two test experiences, it is important to note that an A/B test can have more than two experiences and still be referred to as an A/B test because test traffic is split by percentage rather than a targeting rule.

Experiences are set up within Adobe Target as part of creating an activity. As a concept, experiences span all the different types of activities, described above, that are available within Adobe Target. Experiences can also span across different pages, visitor sessions, and so on. Experiences consist of all of the content and/or code that are used to present that experience.

Where to start

Many organizations struggle to decide where they should focus their initial testing efforts. When an organization secures a testing solution such as Adobe Target, the endless possibilities can be daunting. Here are some suggestions to help you determine where you should start testing:

- **Pages with high traffic content:** Tests need traffic for the statistics behind testing to determine results. The more traffic you have, the better your chances of determining whether the test experiences impact visitor behavior with statistical confidence.

  High traffic content locations, such as an organization's home page, offer organizations a place to hit the ground running. There is much to learn from this page because visitors arrive on it for various reasons. Testing can find out exactly what these visitors are looking for and how best to provide it. Additionally, home pages or highly trafficked pages where tests are running provide high visibility throughout the organization which can help the testing team quite a bit as it shows the organization is behind its efforts.

- **Organizational driven initiatives:** On occasion, organizations find themselves undertaking key initiatives at the same time testing solutions have been secured. The momentum surrounding these initiatives can offer a window of opportunity to integrate with testing and thereby help shape those initiatives. For example, organizations have seen substantial value in testing the rollout of mobile pages and mobile apps with new capabilities put in place.

Testing and test results can offer an early view into the value of these efforts. As another example, we know of many organizations whose test results on mobile sites changed everything in terms of how they were going to structure their navigation. Tests and the data from those tests showed them what visitors preferred, and the resulting changes made a significant impact to their bottom line.

- **Landing pages:** Some organizations have sets of landing pages that are independent from the core site; if testing or getting testing on the site has political challenges, these pages offer a great place to start. They allow the organization to get used to testing and typically offer the lowest hanging fruit in terms of quantifiable wins. These pages offer an opportunity to present relevant content through a test. When visitors arrive on these pages, Adobe Target knows much about them, including time of day, geographic location, referring page, and possibly even the referring query term. All of this information can be used to set up business rules within Adobe Target to allow the mbox to present content related to this known information within an activity.

- **Ease of implementation:** Testing solutions such as Adobe Target require, at a minimum, that a single line of code be placed in the source code of the page. Adobe Target has gone to great efforts to make this implementation as simple as possible. That said, some organizations have code release cycles that are infrequent, so organizations must explore which pages or which digital properties can get this tag in place to allow them to initiate their testing efforts. Usually, independent landing pages or pages hosted by third-party organizations offer this greater flexibility. Additionally, Adobe's recent acquisition of a tag management platform called Satellite Tag Management, and now known as Dynamic Tag Manager, will help those organizations that have these issues of getting tags, such as the ones by Adobe Target, in the future.

- **Where are the key segments of traffic consuming the content?** The following figure shows that much is known about sites' visitors as they arrive on your digital properties. Any or all of these attributes can be used to run simultaneous activities, and many organizations use this information for their initial focus as to where to start their testing efforts. On occasion, organizations recognize capabilities that might be lacking in their current infrastructure and determine how Adobe Target can help fill the void. Many organizations use Adobe Target for their geo-targeting, for mobile traffic redirection, and for scaling landing pages based on current marketing efforts.

● **Note:** You'll learn much more about integrating Adobe Target with Adobe's Dynamic Tag Manager in a later lesson.

Figure 1.2
Customer attributes can
be used for targeting
and segmenting tests.

Site Behavior Variables	Environment Variables	Referrer Variables

• Customer/prospect
• New/return visitor
• Previous visit patterns
• Previous product interests
  – top level
• Previous product interests
  – low level
• Searches
• Previous online purchases
• Previous campaign
  exposure
• Previous campaign
  responses
	• IP address
	• Country of origin
	• Time zone
	• Operating
	  system
	• Browser type
	• Screen
	  resolution
		• Referring domain
		• Campaign ID
		• Affiliate
		• PPC
		• Natural search
		• Direct/bookmark

Temporal Variables
• Time of day
• Day of week
• Recency
• Frequency

Highly Predictive
Anonymous Profile

**Offline
Variables**

Understanding your digital properties' goals

Before an Adobe Target user can set up an activity or test, or even choose which test to execute, it is necessary to identify which key metric you're hoping to evaluate with the test. You can do this by considering what purpose your site or digital property serves.

If the test is executed in a display ad or within an email, the success event or goal you are hoping to change will often be simply clicking through or engaging with the content that is presented. For websites that have many goals, you may find it a challenge to select which goal to select as the primary goal of the test. Adobe Target has made this much easier for organizations because it allows its users to specify as many goals or activity success events as desired.

It is a best practice to include any and all key goals as part of each activity managed through Adobe Target. Here are verticals and the goals that they have applied to their testing efforts:

• **Retail properties:** Sales or total revenue driven on the site is the most common goal with the inclusion of Average Order Value (AOV) and Revenue Per Visitor (RPV). This metric provides clear visibility into the financial impact that various activity experiences provide. These properties could also include key page visits, registering on the site, referrals, clicking on content, and even engaging in upsell or cross-sell activities.

- **Financial or insurance properties:** These types of organizations have designed their digital properties to allow quick and easy account signup, so the most common goal typically is to net new acquisition of customers. Although this goal directly impacts an organization's bottom line, these organizations typically also include goals such as signing in, visiting other areas of the site to see additional offerings, and signing up for affiliate or co-sponsored products or services.

- **Publishers:** Publishers have historically been focused on pure consumption of content or page views. More often than not, revenue was solely derived from advertisements, but that has changed with affiliate relationships and co-sponsorship activities. Global Page Views, registrations, and social referrals (such as "liking") are all key events that can be included as a test's success events.

Best practices

Whether you or your organization are new to testing or not, some steps can be taken to ensure testing success and enable a culture of optimization. Each organization is different, but here are some common steps that will help you start off on the right foot:

- **Build a test or activity road map:** An activity road map can help an organization steer its focus and prioritize which tests should be executed first and which will require additional development efforts. An activity road map also allows the greater organization to observe the testing team's focus and energy. One of the best things an organization can do for its testing efforts is getting a road map in place. This road maps are crucial for any organization that wants the most out of their testing efforts.

- **Establish communications about testing early:** It is quite surprising that many organizations still struggle with this best practice. Those organizations that do not establish clear communication processes up front find themselves performing unnecessary damage control and repeating the same mistakes over and over again. Communication about test launch, test deactivation, test results, and testing capabilities are key to any organization that wants to get the most out of their testing platform.

- **Invest in training:** Most organizations get their training from hands-on experience, which is great. But annual training can increase efficiency. Attendees should be from the technical and business sides, because there is much to learn on both ends. Training should be revisited with new employees and with new releases provided by Adobe Target.

- **Build alliances:** Alliances are the greatest weapon that organizations have to get testing in place. Whether it is the IT group or the department that resists testing, alliances with key stakeholders that believe in the value of testing and