



## HubSpot Academy Lesson: Maximizing ROI With Marketing Attribution and Experimentation

### Video: The Role Attribution Can Play in Your Marketing

Take a moment to think about all the content you have or are planning to create to align with the buyer's journey. Then, think about the channels you'll use to publish or distribute that awesome content. The exact number will vary depending on your leads and customers.

Now think about your reporting strategy. How are you going to pull all that data together? After all, you need to be able to tell your team or stakeholders what's working and what's not. That way you can double down on the strategies and tactics that are driving results and pause or reorient the ones that aren't. But with so many channels – like paid-per-click (PPC) ads, your website, messaging apps and social media – and touchpoints – like specific ads, blog posts, website pages, and emails – reporting on your marketing performance can quickly become overwhelming. Too many data points and not enough hours in the day. So what do you do?

Thankfully, marketing attribution does this heavy lifting for you. Marketing attribution reporting helps you see the impact marketing had on a specific goal, usually a purchase or sale. For example, to see how a blog post or social media campaign impacted sales, you might use marketing attribution techniques to determine how many leads or how much revenue that set of assets influenced.

As Davis Mastin, Reporting Product Manager, here at HubSpot describes it: "Attribution surfaces which interactions a person or group of people took along their journey toward a desired outcome or 'conversion' point."

In short, this report compiles all your customer data into one place and assigns credit to the marketing channels and touchpoints that influenced them throughout their buyer's journey. This calculation is done through various statistical models, called attribution models, which you can customize depending on your organization's sales cycle.



Ultimately, with this type of report in your toolset, you'll be able to determine the ROI for each channel or touchpoint. This will help you surface the most effective ways to spend your marketing budget and tailor your marketing campaigns and content to your unique personas.

Let's explore this in action.

Barn2Door is a software company based in Seattle, Washington. The platform enables farmers to sell their products directly to consumers online by making it easy for customers to manage their online stores, balance their books, and file their taxes. This company also helped many farmers digitize their record-keeping, a process traditionally done by hand.

Before we dive into how Barn2Door uses marketing attribution reporting, it's important to understand their customer's typical path to purchase.

Typically, the process kicks off with social media ads. Based on personal research and customer data, Barn2Door knows many good-fit potential customers use Facebook. They use Facebook advertising to promote their eBooks, blog posts, worksheets and checklists to reach their target audience.

To access and download most of these content offers, a lead enters their email address. This adds the lead to the Barn2Door CRM. From there, the new lead is nurtured using a mixture of success stories, testimonials, and webinars. A lead advancing along their buyer's journey is ultimately served a Barn2Door video demo. This is considered the most important qualifying step in the buyer's journey. It showcases the lead's interest in Barn2Door software and acts as a signal for the sales team to reach out.

So, what role does data and more specifically, attribution, play in all of this?

Barn2Door had a solid grasp on how people were discovering their company before attribution.

But, they needed more insight on everything that came afterward – like, which content people liked to interact with before talking to sales.

Attribution reporting allowed them to pinpoint the content that influenced people to progress through their buyer's journey and the content that didn't. The team found that some of their content wasn't getting them the ROI they needed, so they adjusted their content strategy accordingly – saving both time and resources.



In the words of Cade Midyett, Growth Marketing Manager at Barn2Door, “Attribution reporting has always been helpful where it isn't always super easy to tell what's working really well. You can look at metrics like page views, but that doesn't necessarily tell you if people are actually warming up or if they are going to eventually sign up.” Attribution reporting provides the team deeper insight into what influences their contacts to take certain actions.

Attribution data also helps Barn2Door to think proactively through lead scoring. That’s right! Reporting needs to be more than a reactive strategy.

Barn2Door uses HubSpot lead scoring to signal to Sales the degree to which leads are qualified. Barn2Door assigns qualification points to key content interactions based on the historic impact content had on the buyer's journey. This helps inform both Marketing and Sales about good-fit prospects for outreach.

Barn2Door reviews this information and other relevant historical data monthly. Now nothing catches the team off guard and if they see something they don't expect, they can take the time to investigate the cause.

Barn2Door advises: Always analyze your attribution reports within the context of all the data and information you're tracking. This informs which attribution models fit your business, showcases your full data story, and ultimately, increases your confidence in what your reports.

Barn2Door looks closely and consistently at their contact data. According to Cade Midyett, “A lot of times I think it's really valuable for us just to look through some examples of customer contacts and just see what did these people click on, and if there are any patterns in what everyone is visiting.”

Beyond buying software like HubSpot that has attribution capabilities, Barn2Door offers some other ways to get started.

According to Midyett, they started simple, by adding just one attribution report on their general marketing dashboard. Over the following months, they gradually adjusted and customized the report. This way the team could monitor how various attribution models answered questions until they identified the one that best fit their business. They chose an attribution model that worked in conjunction with their other data and reporting methods, which assured the team it would work for future reports.



As their attribution confidence grew, so did their use of the report type. This took time. Each member of the team needed to research and understand what the reports did in order to effectively use them.

Now, the team over at Barn2Door uses an entire dashboard devoted to attribution reporting to make data-driven marketing decisions. They can clearly answer questions like:

- What was the ROI of our Facebook ad campaign last quarter?
- What content drove the most leads last month?
- Where is the best place to invest my marketing resources?
- Which pages are viewed the most before someone becomes a customer?

And so many more. The information on this dashboard, together with the rest of their analytics, helps the team to determine where to adjust and optimize their content strategy.

Ultimately, attribution reporting can give you concrete answers to the age-old question: What is the ROI of my marketing efforts? Whether you're measuring success in lead generation, revenue, or sales qualified leads, this reporting type can help you answer critical questions and determine timely next steps. It can be used to determine just how successful your inbound marketing foundation is at propelling company growth. When used to steer and direct your marketing strategy, it can help your flywheel spin around.

## **Video: Find the Attribution Model That Fits Your Needs**

You may be thinking, "Not all page views or marketing channels should be treated equally when it comes to conversions." And you'd be right. Pulling all the interactions in your journey into a report is only half the magic. The other half is the ability to use different attribution models.

An attribution model lets you apply different credit to each interaction according to the model's rules. For example, some models apply all credit to the first or last interaction in someone's journey, while others use mathematical rules to weigh credit throughout.

Which model should you use? The answer depends on your team's goals and the expected supporting analysis.



There isn't a one size fits all for attribution reporting. Test out the different models over time. View your report within the context of larger dashboards or datasets to ensure you're choosing the model that most accurately represents your organization's buyer's journey.

With all this in mind, let's review the most common attribution models and their use cases. Single source attribution models assign all the credit to one touchpoint, usually first touch or last touch.

First touch, also referred to as first interaction, gives all credit to the first interaction that led to the desired action or conversion. This is a great model to choose if you're curious about the content or channel that is initially bringing visitors to your site.

For example, say a visitor finds your website through organic search. A week later they see a Facebook Ad advertising your products, click the ad, and go on to make a purchase. In this case, the organic search would get 100% of the credit for that conversion.

Similarly, last touch, often called last interaction, gives all credit to the last interaction that led to a conversion like a closed won deal.

In our example, the Facebook Ad would get all the credit for driving the purchase.

Then there are multi-touch attribution models. These give each contributing channel a slice of credit for the final conversion. These models are great because they account for the entirety of the customer journey. The amount of credit given to each touchpoint/interaction will depend on the model you choose.

Here are the multi-touch attribution models you're most likely to encounter:

Linear attribution looks at all interactions a prospect had before the conversion and gives equal credit to each interaction. Linear attribution is great if your prospects are often in the consideration phase for an extended period because it highlights the impact all your content and messaging had during that time.

Full-path gives 22.5% of credit to the first interaction, 22.5% to the interaction that created the contact, 22.5% to the interaction that created the deal, and 22.5% to the interaction that closed



the deal. It evenly distributes the remaining 10% across all other interactions. Use a full-path attribution model to understand how your marketing impacts revenue generation.

Time decay gives more credit to interactions that happened closer in time to the conversion. Time decay attribution is ideal if you're measuring the success of short-term touchpoints like campaigns.

To ensure we don't get too abstract with our talk of modeling, let's review some fictitious examples:

Maria runs the paid search and social channels at her company, AvocadoToasted. Maria recently ran a series of Instagram ads to showcase their new avocado toast kits, encouraging users to discover their tasty, affordable recipes. Which attribution model should Maria use to prove the ROI of her efforts and identify what is driving new traffic to her brand?

If you guessed, first touch attribution, you're correct! Demand generation marketers who are trying to highlight campaigns that first introduced customers to their brand, regardless of the outcome, really benefit from this model.

First touch attribution, however, doesn't give you much insight on what parts of the journey to optimize. It can be difficult to use a first touch report to justify your team's impact on your company's bottom line.

Let's do another one.

Charlie works on the blog at a clothing brand called CleanCut. They provide fashion advice, styling tips, and more. They're looking to increase the number of conversions their blog posts generate so they add a pop-up form to the listing page and their highest trafficked blogs. What model should they use to report on the efficacy of this experiment?

If you guessed last touch attribution, you're correct. This marketing attribution model can be powerful if your business has a short buying cycle. For example, if you know that leads and customers don't usually have many touchpoints with your brand before buying, a last-touch model could help your team unlock some great insights about buying behavior.



There are some important considerations about the last touch model. The last touch model ignores influences on the path to conversion. A lead may interact with your company a dozen times before converting and a last-touch model provides zero visibility into potentially influential interactions. Make sure you know what the report shows and what it doesn't.

Let's stick with some more complex conversions.

Luisa works as a marketer for a lifestyle brand called CatchAVibe. She is tasked with optimizing the company's landing pages and improving their conversion rates. After some user research, she determines that most people access these landing pages via an email nurturing campaign. The form asks some redundant questions that members of this lead nurturing campaign may have already answered, so she decides to remove some fields and run her test.

Which model would help Louisa prove the success of this change?

If your answer was time decay, you're on a roll. This model recognizes the significance of every interaction leading up to a conversion while still placing the most value on the activity that drove the conversion. In this situation, the report would highlight the influence both the email and the landing page played in the visitor's conversion.

The touches closest to the conversion – in this case, the form – become more valuable as each increases the likelihood of a conversion. Use this model to optimize for touches that drive conversions as well as for touches that increase the likelihood of a conversion in the near future. This is particularly important when analyzing conversion paths and sequences.

Let's do one more example, just to make sure everyone's got this concept down.

Malik just joined a growing company, NoBones, as a new revenue operations manager. He wants to pull three categories of data from the past year: the overall channels, content offers, and initiatives that funneled qualified leads and customers to Sales. This information will get him up to speed with what's working and what's not. After taking a look at the team's analytics, he decides to build an attribution report. Which model could help him answer this question?

First and last touch attribution models will only show him a limited scope of what influences buying behavior overall. These would be great models to use in subsequent report building,



especially if Malik was looking at lead generation or identifying areas for improvement in the buyer's journey.

Time-decay may work, but it wouldn't give him the most comprehensive story. While it provides excellent attribution for conversion optimization, the time decay marketing attribution model lacks the ability to recognize the interaction which originally introduced the customer to your brand. If Malik needs the full story of how marketing contributed to the company this past year, this isn't the best fit either.

That leaves us with linear or full-path. Both could technically work, but here's some advice about the strongest approach.

If Malik was just getting started with attribution and needed to get a sense of the overall customer journey at his company, linear would be the way to go. He could start optimizing for the customer journey, instead of a single activity, by assigning even credit to each marketing interaction.

But linear attribution has its limitations. Because not every interaction equally propels a customer toward purchase. This model would show low-value touches like email clicks as for high-value conversion activities like demo requests.

But Malik, as an operations manager, needs to help his teams optimize for particular outcomes in the future. A full-path attribution model would help him identify those high impact conversions, while not fully discounting the assisting interactions. This gives Malik a full story while still accounting for macro and micro conversions. Ultimately, it would depend on the exact question Malik needed to answer and what he intended to do with the information he found.

Keep in mind, there are no definite rules in the attribution model you choose. There are simply ones that will fit situations and questions a little more than their compatriots. Ultimately, the one you choose will depend on the report you're trying to build and what you need it for. The more you use attribution models and see how they influence your reporting, the easier this decision will be!

### **Video: Building Effective Experiments for Your Audience**

Let's face it: It's not enough to just report on your marketing activity. In order to move from a reactive marketing strategy to proactively solving for your leads and customers, you need to turn your data into action. One of the best ways to do that is to find out where there may be friction in





the buyer's journey (often identified with conversion rates) and figure out how to optimize for that interaction.

But, that doesn't mean going and changing everything about your website overnight. You want to fire bullets, then cannonballs.

Now, beyond a totally quippy saying, what does that actually mean?

"Fire bullets, then cannonballs" is a concept developed in James C. Collin's book, "Great by Choice." The idea is that you fire bullets or low-cost, low-risk, and low-distraction experiments to figure out what will work for your business and audience.

Once you have the data to prove your experiment was a success, you then fire a cannonball, where you concentrate resources into a big bet. That way, every update, optimization, or change you make to your website, strategy or approach is backed by data forecasting that it's the right move to make.

How do you turn small proven ideas (bullets) into huge hits (cannonballs) at your organization? It all starts with great marketing experiments.

A marketing experiment is a form of market research in which your goal is to discover new strategies for future campaigns or validate existing ones.

For instance, a marketing team might create and send emails to a small segment of their readership to gauge engagement rates, before adding them to a campaign. Think of running a marketing experiment as taking out an insurance policy on future marketing efforts. It's a way to minimize your risk and ensure that your efforts are in line with your desired results.

The most common way to incorporate marketing experiments into your strategy is to start with A/B testing.

A/B testing, also known as split testing, is a marketing experiment wherein you split your audience to test a number of variations to a piece of content to determine which performs better. To run an A/B test, you need to create two different versions of one piece of content with changes to a single variable. You'll show these two versions to two similarly sized audiences and analyze which version performed better over a specific period of time – long enough to make accurate



conclusions about your results. A/B testing has a multitude of benefits to a marketing team depending on what you decide to test. Let's review a few.

Increased website traffic:

Testing different blog post titles or webpage titles can affect the number of people who click the hyperlinked title to get to your website. This can increase website traffic.

Higher conversion rate:

Testing different locations, colors, or even anchor text on your calls-to-action (CTAs) can change the number of people who click to get to a landing page. This can increase the number of people who fill out forms on your website, submit their contact info to you, and convert into a lead.

Reduced bounce rate:

If your website visitors leave (or "bounce") quickly after visiting your website, testing different blog post introductions, fonts, or featured images can reduce this bounce rate and retain more visitors.

Reduced cart abandonment:

Ecommerce businesses see an average of 70% of customers leave their website with items still in their shopping cart. This is known as "shopping cart abandonment" and is, of course, detrimental to any online store. Testing different product photos, check-out page designs, and where shipping costs are displayed can lower this abandonment rate.

With so many benefits, the question becomes, what A/B tests can you run to start optimizing for your customer experience at scale?

The most common A/B tests involve landing pages, CTAs, and email. Let's review some key elements to successfully conduct your own tests.

With landing page A/B testing, you have one URL and two or more versions of the page. Visitors will be randomly sent to one of your variations. Standard landing page A/B testing tools remember which page the reader landed on and will keep showing that page to the user. For statistical validity, split tests need to set a cookie on each visitor to ensure the visitor sees the same variation each time they go to the tested page.



This is how HubSpot's landing pages tool works. HubSpot's landing pages enable you to create A/B tests and track several metrics to evaluate how your experiment is performing. It keeps a record of the number of people who viewed each variation and who took the intended action.

For example, say each of your landing page variations was viewed 180 times. However, the top-performing landing page generated 20 clicks and the lowest performing one generated five clicks. You'd want to stick with the version that was inspiring your visitors to take the desired action, which in this case is clicking an element on the page. That way, if you continue to drive traffic to that page, you know it's optimized for conversions.

Landing page design is about creating an enticing site page for your target audience and website visitors. It should encourage them to convert from leads into subscribers or customers. So, if you're looking to optimize said landing pages, where should you start?

On your landing pages, conduct tests on your offers, copy, and your form fields. You can use a similar approach for your blog's conversion strategy.

Here's an example of how HubSpot put this into practice.

Based on previous data, HubSpot found that non-bounce desktop users who engage with search have a 163.8% higher blog lead conversion rate than those who do not. However, only a very small percent of blog traffic interacts with the search bar. That's why HubSpot decided to test the visual prominence and functionality of the site search bar.

HubSpot used three variants for this test, using offer thank you page views as the primary metric. For variant A, the site search bar had increased visual prominence and the placeholder text was altered to "search by topic."

For variant B, the search bar had increased visual prominence, the placeholder text was altered to "search by topic," and the search function searched the blog, rather than the whole site.

For variant C, the search bar had increased visual prominence, the placeholder text was changed to "search the blog," and the search function searched the blog, rather than the whole site.

HubSpot found that all three variants increased the conversion rate. However, variant C showed a 3.4% increase in conversion rate and a 6.46% increase in users who engage in the search bar.



You can also run A/B tests on your CTAs. CTA split testing works pretty much the same way as landing page split testing. You create two or more variations of your CTA, place them on the same page and display them to visitors randomly. The goal is to determine which CTA attracts the most clicks.

HubSpot's CTA module enables you to quickly build A/B tests and identify the data that matters the most to your organization. For instance, you might look at the views-to-click rate in an effort to optimize the CTA, but if your click-to-submission rate is surprisingly low, the problem might lie with the landing page. That is why, ultimately, you want to optimize your view-to-submission rate.

You should only run one A/B test at a time, so don't try to optimize both the CTA and the landing page simultaneously. Change one variable at a time to understand which element triggered the results.

When running a CTA A/B test, consider testing your placement, size, color, copy, and any graphics on your button.

HubSpot uses several different calls-to-actions in its blog posts. On any given blog post, you'll notice anchor text in the introduction, a graphic CTA at the bottom, and a slide-in CTA when you scroll through the post. However, on mobile, these CTAs might seem intrusive – HubSpot tested mobile CTAs.

Previous A/B tests revealed that HubSpot's mobile audience was 44% more likely to click through to an offer landing page and 18% more likely to convert on the offer if all CTAs were stripped from blog posts and there was only one CTA bar at the bottom of the page with no ability to exit. HubSpot decided to test different versions of the bottom-of-the-page CTA bar, using thank you page views as the primary metric and CTA clicks as the secondary metric.

HubSpot used four variants for this test.

For variant A, the control, the traditional placement of CTAs remained unchanged.

For variant B, the CTA had a maximize/minimize option so readers could dismiss the CTA using an up/down caret.



For variant C, the CTA had an X that would completely dismiss the CTA from the post leaving no formal CTA on the blog.

For variant D, the CTA had no X or a maximize/minimize option.

Variant B saw a 7.9% increase, variant C saw an 11.4% decrease, and variant D saw a 14.6% increase.

HubSpot used that data to project that using variant D on mobile would lead to about 1,300 additional submissions each month.

Last, but certainly not least, you can choose to A/B test your emails.

Most email providers automate the split testing process enabling you to compare different elements about your email. These email tools randomize the list of recipients into two or more groups (you need to ensure the groups are big enough to give you a statistically significant result) and associate each email variation accordingly. HubSpot, for instance, splits your email campaign to help you find out the best subject line and time of day to send an email. A tool like can also send the winning variation to the remainder of your group.

This is a fantastic way to optimize your list and deliver the message that attracts the most attention. HubSpot and most standard email providers enable you to pick a winner based on either open-rate or clickthrough rate. However, you also want to see which email is bringing in the most conversions. Identify which variation, combined with the right landing page, delivers the best results. For this type of reporting you need to integrate your email marketing to marketing analytics. There are a variety of different areas you could test in your emails, including: format, layout, timing, sender, subject lines, and target group. Let's explore an example.

Gathering reviews from users isn't always an easy task. That's why HubSpot decided to A/B test ways to reach out to customers. They tested in-app notifications versus email. HubSpot sent an in-app notification and email notifying users they won champion user-of-the-month and would receive a \$10 gift card if they left a review on the Capterra site.

For variant A, HubSpot sent a plain text email to users.

For variant B, HubSpot used a templated email.



For variant C, HubSpot sent an in-app notification.

HubSpot found that unlike emails, in-app notifications are often overlooked or missed by users. The emails outperformed in-app notifications by 140%. 24.9% of people who opened either email variant left a review, compared to 10.3% of those who opened the in-app notification.

This by no means a comprehensive list of all the A/B tests you could run. While landing page, CTA, and email are the most common areas to experiment on, you may find yourself wanting to experiment on certain web forms or the layouts of key site pages (like your pricing page). That's great! The appeal of A/B testing is that it can be done on many different marketing assets.

Test whichever type of content you work with the most to ensure you get a better sense of the experience your audience wants from your organization. That way you can maximize your potential conversions and continue to solve for your customers. Firing bullets instead cannonballs not only helps you mitigate risk, it puts your marketing data to good use by helping your forecast future success!

### **Video: Building Effective Experiments for Your Audience**

The process of implementing A/B testing can quickly give rise to a number of questions. Like What should you start testing? And how long should a test last? Things get confusing. Thankfully, there are plenty of guidelines you can use to make sure you're designing the most effective tests. Together, let's review some of these best practices.

Pick one variable to test.

As you optimize your web pages and emails, you might find there are a number of variables you want to test. But to evaluate how effective a change is, you'll want to isolate one "independent variable" and measure its performance. Otherwise, you can't be sure which variable was responsible for changes in performance.

Simple changes, like changing the image in your email or the words on your call-to-action button, can drive big improvements. In fact, these sorts of changes are usually easier to measure than the bigger ones.



Identify your goal.

Choose a primary metric to focus on before you run the test – before you even set up the second variation. This is your "dependent variable" and it will change based on how you manipulate the independent variable.

Think about where you want this dependent variable to be at the end of the split test. Consider developing a hypothesis and examine your results based on this prediction.

If you wait until afterward to think about which metrics are important to you, what your goals are, and how the changes you're proposing might affect user behavior, you might not set the test up effectively.

Create a 'control' and a 'challenger.'

You have your independent variable, your dependent variable, and your desired outcome. Use this information to set up the unaltered version of whatever you're testing as your control scenario. If you're testing a web page, this is the unaltered page as it exists already. If you're testing a landing page, this would be the landing page design and copy you would normally use.

From there, build a challenger – the altered website, landing page, or email that you'll test against your control. For example, if you're wondering whether adding a testimonial to a landing page would make a difference in conversions, set up your control page with no testimonials.

Then, create your challenger with a testimonial.

Split your sample groups equally and randomly.

For tests where you have more control over the audience – like with emails – you need to test with two or more equal-sized audiences to achieve conclusive results. How you do this will vary depending on the A/B testing tool you use.

Pro Tip: If you're a HubSpot Professional or Enterprise customer conducting an A/B test on an email, HubSpot will automatically split traffic to your variations so that each variation gets a random sampling of visitors.

Determine your sample size.



How you determine your sample size will also vary depending on your A/B testing tool, as well as the type of A/B test you're running.

You'll probably want to send an A/B email test to a large-enough subset of your list to achieve statistically significant results. Eventually, you'll pick a winner and send the winning variation on to the rest of the list.

If you're testing something that doesn't have a finite audience, like a web page, the duration of your test will directly affect your sample size. Run it long enough to obtain a substantial number of views. Otherwise, it will be hard to determine a statistically significant difference between variations.

Decide how significant your results need to be.

Once you've picked your goal metric, think about how significant your results need to be to justify choosing one variation over another. Statistical significance is a super important part of the A/B testing process that's often misunderstood.

In marketing, statistical significance is when the results of your research show that the relationships between the variables you're testing (like conversion rate and landing page type) aren't random; they influence each other. You want your results to be statistically significant because it means that you're not wasting money on campaigns that won't bring desired results.

Marketers often run statistical significance tests before launching campaigns to compare success metrics of specific variables.

Many tools use a 95% confidence threshold, but for your experiments, it might make sense to use a lower confidence threshold if you don't need the test to be as stringent.

Matth Rheault, a senior software engineer at HubSpot, likes to think of statistical significance like placing a bet. What odds are you comfortable placing a bet on? Saying "I'm 80% sure this is the right design and I'm willing to bet everything on it" is similar to running an A/B test to 80% confidence threshold and then declaring a winner.





Rheault also says you'll likely want a higher confidence threshold when testing for something that only slightly improves conversion rate because random variance is more likely to play a bigger role.

"An example where we could feel safer lowering our threshold rate is an experiment that will likely improve conversion rate by 10% or more, such as a redesigned hero section," he explained.

Rheault concludes: "The takeaway here is that the more radical the change, the less scientific we need to be process-wise. The more specific the change (button color, microcopy, etc.), the more scientific we should be because the change is less likely to have a large and noticeable impact on conversion rate."

Pro Tip: Measure the significance of your results using HubSpot's A/B testing calculator. Optimizely and SurveyMonkey both have great options for comparing your results against the confidence threshold you choose.

Run your test.

You'll need an A/B testing tool to perform an A/B test on your website or in an email. If you're a HubSpot customer, HubSpot software has features that let you A/B test emails, calls-to-action, and landing pages.

For non-HubSpot customers, other options include Google Analytics, which lets you A/B test up to 10 full versions of a single web page and compare their performance using a random sample of users.

Test both variations simultaneously.

Timing plays a significant role in your marketing campaign's results, whether it's time of day, day of the week, or month of the year. If you were to run Version A during one month and Version B a month later, how would you know whether the performance change was caused by the different design or the different month?

You need to run both A/B variations at the same time, otherwise you may be left second-guessing your results.



The only exception is if you're testing timing itself, like finding the optimal times for sending out emails. The optimal time for subscriber engagement can vary significantly by industry and target market.

Give the A/B test enough time to produce useful data.

Again, you'll want to make sure that you let your test run long enough to obtain a substantial sample size. Otherwise, it'll be hard to tell if there was a statistically significant difference between the two variations.

How long is long enough? Depending on your company and how you execute the A/B test, getting statistically significant results could happen in hours ... or days ... or weeks. Traffic is a major determinant in statistically significant results. It will take much longer to run your A/B test if your business doesn't get steady website traffic.

Finally, let's cover the steps to take after your A/B test.

Focus on your goal metric. Although you'll be measuring multiple metrics, keep your focus on that primary goal metric when you do your analysis.

For example, if you tested two variations of an email and chose leads as your primary metric, don't get caught up on open-rate or clickthrough rate. You might notice a high clickthrough rate and poor conversion rates and inadvertently (or distractedly) choose the variation that yielded better performance numbers/statistics.

Take action based on your results.

If one variation is statistically better than the other, you have a winner. Complete your test by disabling the losing variation in your A/B testing tool. If neither variation is statistically better, you've just learned that the variable you tested didn't impact results, and you'll have to mark the test inconclusive. In this case, stick with the original variation, or run another test. You can use the failed data to help iterate for your new test.