OPTIMIZELY Integration Guide

1. Overview

Extole partners with Optimizely to deliver easy-to-launch A/B testing for your referral program. A/B testing uses two versions of the Extole advocate-to-friend conversion funnel: the control group and the test group. Live traffic will be divided between these two groups to determine which is the more effective variation. While additional testing capabilities (such as multivariate testing) are available through Optimizely, this document only covers A/B testing.

2. Before You Begin

This document assumes you have the following:

- Extole: Access to and familiarity with the Extole platform. If you are doing your initial setup, you will use Optimizely to add zone tags. Extole setup can be viewed below.
- Optimizely: Access to and familiarity with Optimizely's A/B testing platform. Optimizely Gold (or higher), which offers the ability to link together variations of different pages, is recommended for multi-page testing. For example, visitors who saw the original version of page one will also see the original version of page two, visitors who saw variation one of page one will also see variation one of page two, and so on. This is particularly helpful for funnel testing. Optimizely setup can be viewed below.
- Development: Access to the source code of your web pages, and knowledge of HTML and JavaScript development.

3. Advantages of A/B testing

Running A/B tests allows you to rapidly optimize campaigns and quickly transform them into effective marketing channels. Implementing an optimization test plan ahead of time will facilitate optimal testing speeds.

Both Extole and Optimizely have data that measures the number of visitors who viewed each group variation and completed the referral funnel. The referral funnel is made up of many different metrics and key ratios that reflect the performance of the program, including:

- Call-to-Action (CTA) Clicks / CTA Impressions
- Advocates (those who share) / CTA Clicks
- Shares / Advocates
- Friend clicks / Advocate Shares
- Conversions / Friend Clicks

Each test should optimize towards a key performance indicator (KPI) or ratio. Your goals are to increase the volume of your chosen metric or ratio, as well as the effectiveness of each step throughout the referral funnel.

Upon completion of the test, a "winner," or more efficient channel, will be declared and used moving forward. Further testing can be done on the same element of the referral program (using the new winner), or different elements of the referral funnel. All campaign changes will be managed through the Extole platform. There is no need to update site code (either Optimizely's or Extole's) once you have set up your site to use A/B test campaigns.

4. Getting Started

EXTOLE CAMPAIGN SETUP

To run an A/B test on two campaigns, you will need to set up on the Extole platform with only one variant between your campaigns.

Example: Campaign A's CTA says "Refer Friends and Earn," while Campaign B's CTA says "Click Here to Share and Get $5." The campaigns are identical otherwise.

OPTIMIZELY PROJECT SETUP

Each Optimizely project has a unique Project Code snippet that must be included on every page that is running experiments or tests.
1. Create an Extole project within Optimizely (if one hasn't been created, you will need to make sure the project code is placed), or use an existing project.
2. Create a new experiment (e.g., "Extole A/B Test") using your website domain as the URL (you can add other URLs later).
3. Copy and paste the project code immediately after your opening <head> tag.

OPTIMIZELY PROJECT SETUP
You will find the tag for your project in the Optimizely dashboard.
1. Tap on your current project.
2. Tap on <Project Code> in the top right. The tag will look similar to the following:
    <script src="//cdn.optimizely.com/js/optimizely_example.js"></script>
3. Copy and paste this code immediately after your opening <head> tag.

5. Extole Tags

EXTOLE'S JAVASCRIPT LIBRARY

Extole's JavaScript (JS) library should be placed onto all of your pages where Extole interactions occur, and should not be configured in Optimizely. The JS library ensures that other Extole tags on your page work properly. It also detects when a friend has come to your page through a referral, and will provide the friend landing experience where applicable.

You can find your specific "client_id" by navigating to Administer > Site Configuration > Site Name > Client ID. The tag will look similar to the following:

```
<script src="https://tags.extole.com/client_id/core.js"></script>
```

Extole recommends placing this snippet in the <head> tag of all pages where Extole interactions happen.

EXTOLE CONTEXT TAGS

Friends trust referrals most when they are personalized, and advocates share more when your CTAs and sharing experiences are seamless. Pass user context into your share experience for the highest program performance. Context tags should be placed onto all of your pages where user information needs to be passed to Extole, and should not be configured in Optimizely. By passing an advocate's first name (f), last name (l), and email address (e) via the context tag, you make sharing easier for your advocates, offer a personalized experience to friends, and increase trust.

The context tag will look similar to the following:

```
<script type="extole/context">{
"params":{
"f":"John",
"l":"Smith",
"e":"john@smith.com",
"partner_user_id":"4938291"
}}</script>
```

EXTOLE CONVERSION TAG

Most programs reward advocates when a conversion event (such as a purchase or new registration) occurs. This event is communicated to Extole by adding a conversion tag to the conversion confirmation page on your site, and should not be configured in Optimizely.

Just like zone tags, the conversion tag will either gather context from a context tag on the page, or from specific parameters that are passed in. Conversion events should always pass customer identifying information like first name, last name, email, order number, etc.

The conversion tag will look similar to the following:

```
<script type="extole/conversion">{
"type":"purchase",
"params":{
"tag:cart_value":"20",
"partner_conversion_id":"00O415320037eWy",
"f":"John",
"l":"Smith",
"e":"john@smith.com"
}}</script>
```

EXTOLE ZONE TAGS WITHIN OPTIMIZELY

Within Optimizely, the only Extole tags that require any changes are the zone tags. No changes are required in Extole's JS library, context tags, or conversion tags.

Optimizely is used to place the Extole zone tags into your site and split traffic between your control and test variations. Instead of directly placing the Extole zone tag into the page, you will use Optimizely to select the A/B variant and then place the appropriate tag.

Without Optimizely, you would place an Extole zone tag on your page, such as the header zone tag:

```
<script type="extole/widget">{"zone":"header"}</script>
```

With Optimizely, you will not place zone tags on your page. Instead, Optimizely will insert the zone tags.

All zones for your first variant should be appended with "_a" and all zones for your second variant should be appended with "_b" to differentiate them.

```
<script type="extole/widget">{"zone":"header_a"}</script>
<script type="extole/widget">{"zone":"header_b"}</script>
```

The above tags are examples of what gets placed in each variation of the experiment. Their location will match the real estate where they should be displayed as part of the Optimizely experiment.

To place the "A" and "B" snippets from the dashboard
1. Use the Optimizely editor to create two variations of the page.
2. Use the Optimizely editor to insert each Extole zone tag into the proper location as HTML.

MULTI-TESTING

With two variations, you want all of the "A" zones to be delivered with the first variation, and all the "B" zones to be delivered with the second. This divides traffic between the control and test groups, enabling you to test any element within your referral program.

• To run an experiment on multiple URLs, leverage the Optimizely targeting solution (tap Options Targeting). The Extole and Optimizely tags will need to reside on all of these pages.
• To create a multi-page experiment, or an experiment that still uses the A/B test
(but can serve"A" content on one page in a different location from the "A" content on other pages), tap Experiment Type > Multi-page Test.

TEST RESULT EXAMPLE

After running an A/B test on a site's CTA (Campaign A's CTA says "Refer Friends and Earn," Campaign B's CTA says "Click Here to Share and Get $5"), Optimizely's data indicated that Campaign B resulted in higher advocacy. Based on the test's outcome, you would apply the higher performing CTA message across your campaigns.

6. Extole Testing Best Practices

The best way to start testing is with an end goal in mind (e.g., conversions or purchases for e-commerce, leads for business-to-business, etc.). Consider the various stages of the Extole referral funnel: where do you believe your program has the biggest opportunity for improved performance?

INCREASING ADVOCACY

Increasing advocacy means getting more of your customers to begin sharing, to share more often, and to share more times over the life of the program.

Key Extole metrics that are used to measure the various aspects of advocacy are impressions, CTA clicks, advocates, shares, and the rates between those metrics (CTA impressions/CTA clicks, shares/advocate). Look to maximize these metrics in your testing efforts.

Common advocacy testing scenarios include:
• CTA Location
• CTA Creative
• Advocate Share Experience Version and Creative
• Landing Page Creative
• Advocate Incentive Offer
• Friend Incentive Offer

INCREASING REFERRAL CONVERSION

Increasing referral conversions involves the stages of the Extole funnel that call for a referred friend to become a new customer. The objective is to maximize the conversions at every step, starting when a friend receives a share message and continuing to when that friend completes the conversion.

Key Extole metrics that are used to measure the various aspects of referral conversion are shares, friend clicks, conversions, and the rates between those metrics (clicks/share, conversion/click). Look to maximize these metrics in your testing efforts.

Common referral conversion testing scenarios include:
• Share Message Subject Line
• Share Message Creative and Default Copy
• Friend Landing Experience
• Friend Conversion Funnel (these steps are typically not part of the Extole served content)
• Friend Incentive Offer

Using the A/B split configuration, you can change any component of the campaign flow in order to isolate the variable you want to test.

REFERRAL CONVERSION TEST EXAMPLE

Take the test result from the example above. As a next step, you may want to test the share message click-through-rate to see if a change in messaging will increase your conversion rate. Start your test by using the "A" and "B" campaign variant structure you used in the first test.

1. Make sure that the variants are identical.
2. Change the email share subject lines in each campaign. In campaign variant "A," change the line to "I thought you would like this." In campaign variant "B," change the line to "Check out this great deal!".
3. Execute the test using Optimizely. The better performing email share subject line will show higher rates as measured by the clicks and clicks/share metrics.
Now you have used your "A" and "B" campaigns to first run a test to increase advocacy, and then followed it with a test to increase referral conversions.