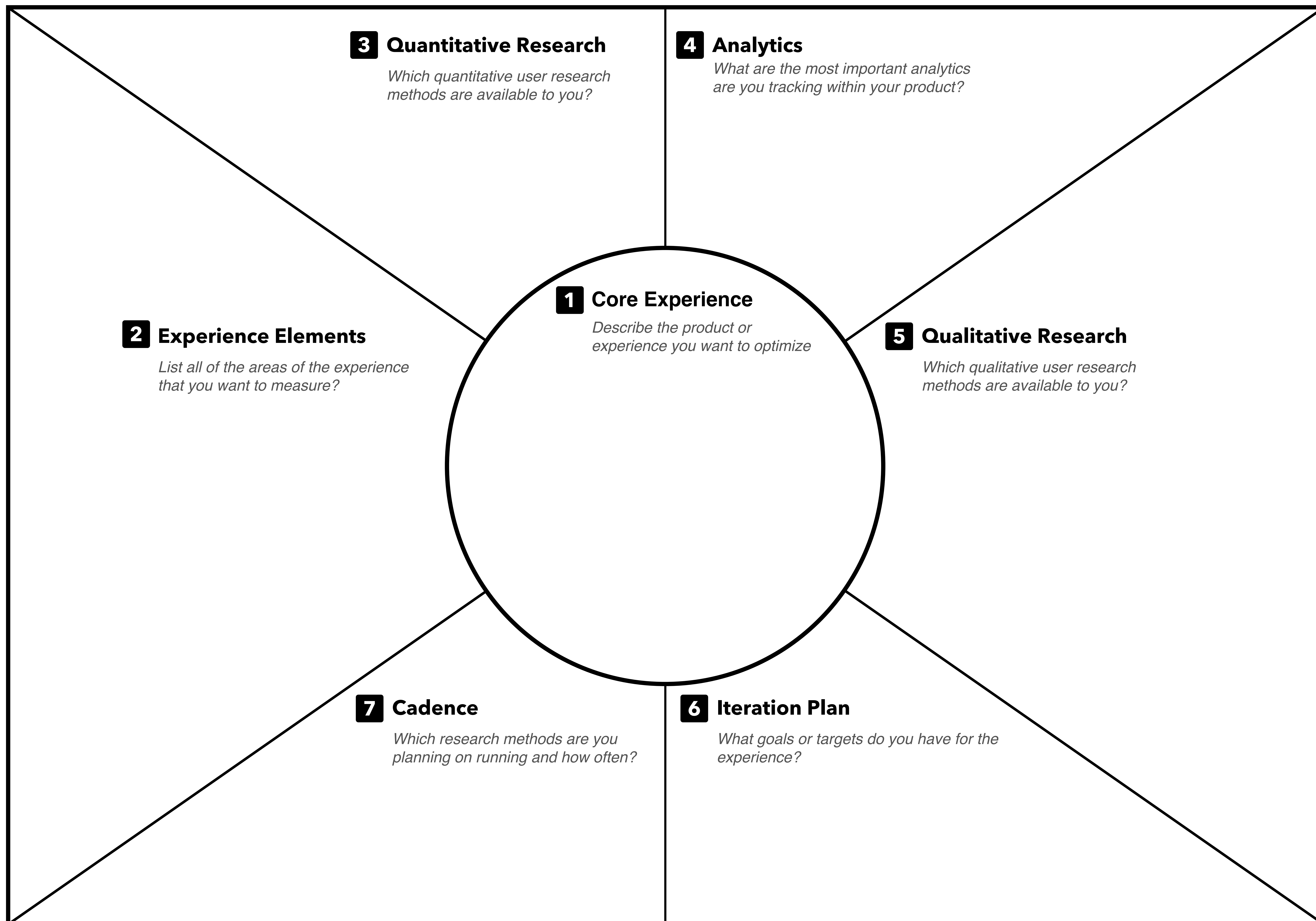


# Optimization Strategy Map

Date: \_\_\_\_\_



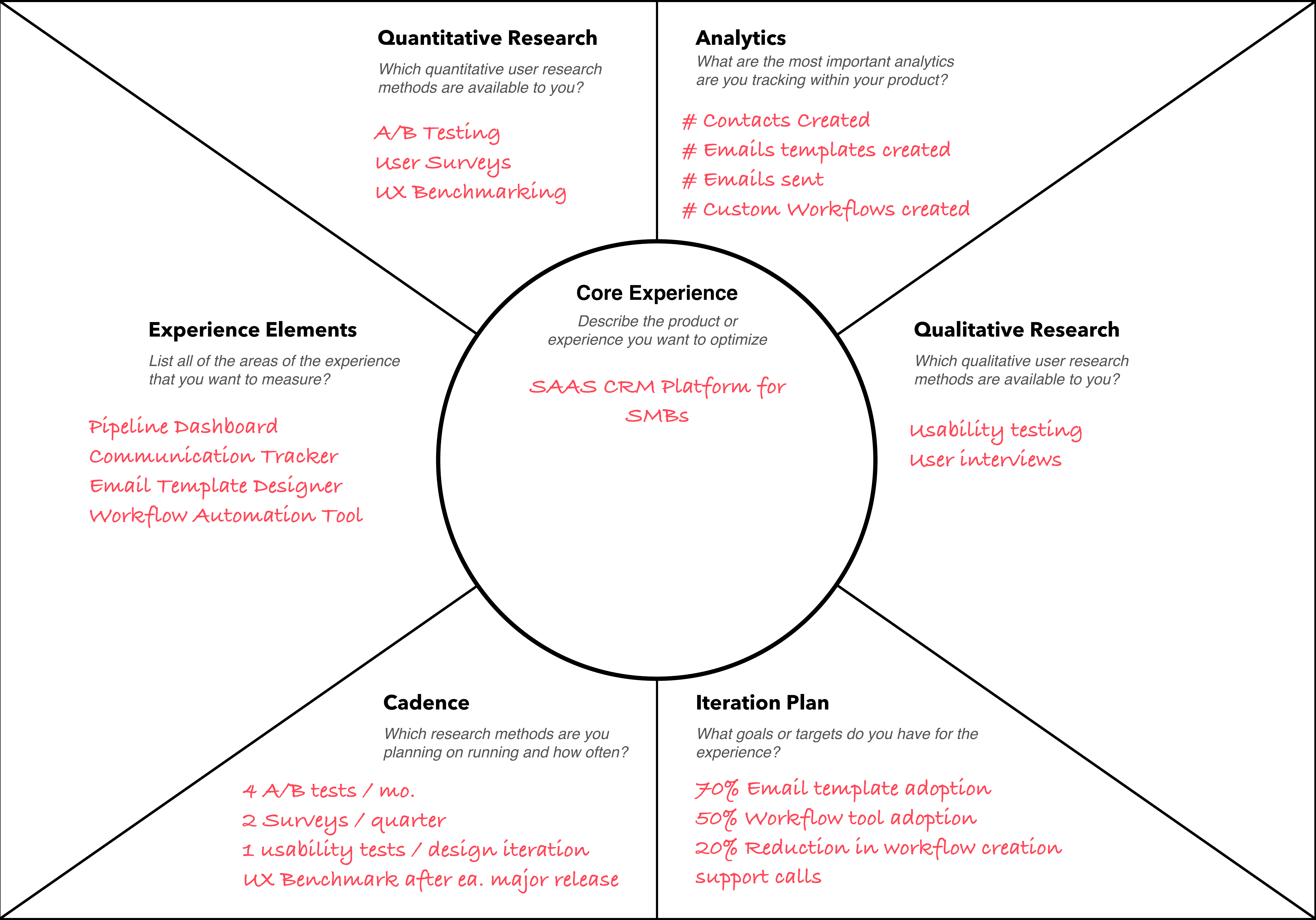
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<http://keitharichall.com/dxo/dxotools.pdf>

# Optimization Strategy Map

Date: \_\_\_\_\_



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<http://keitharichall.com/dxo/dxotools.pdf>

# Experimentation Plan

What experience are you testing?

## What do you know?

*What have you learned from analytics, qualitative research and quantitative research?*

## What is your hypothesis?

*Based on what you know, describe the problem and a possible solution.*

## What will you test?

*How will you test your hypothesis?  
What does the proposed solution look like?*

## What is your Primary Metric?

*Which single measure will you use to determine success?*

## What are your Secondary Metrics?

*Which other metrics will you use to help determine next steps? (health metrics, do no harm metrics, etc.)*

## How will you iterate?

*How will you follow up after you test your hypothesis?*



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# Experimentation Plan

What experience are you testing?

CRM Workflow Automation Tool

## What do you know?

*What have you learned from analytics, qualitative research and quantitative research?*

50% of users do not complete workflow creation

78% abandon at setting up triggers step

Spike in customer support calls

## What is your hypothesis?

*Based on what you know, describe the problem and a possible solution.*

Users are not sure how to start

Trigger set up is confusing and has too many steps

## What will you test?

*How will you test your hypothesis? What does the proposed solution look like?*

Provide some predefined triggers that can be used out-of-the-box or further customized

## What is your Primary Metric?

*Which single measure will you use to determine success?*

% completed workflow creations

## What are your Secondary Metrics?

*Which other metrics will you use to help determine next steps? (health metrics, do no harm metrics, etc.)*

Customer support inquiries

## How will you iterate?

*How will you follow up after you test your hypothesis?*

Roll to production if successful.  
Keep iterating until 95% workflow completion rate



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