



## How-to Guide: How to Request an Experiment

# How to Request an Experiment

Persado uses **Experiments** to identify the right words for your audiences with mathematical certainty. This step-by-step guide will teach you how to submit an Experiment request in the Persado Portal. The submission process takes approximately 5 minutes and notifies the Persado team to begin creating Variants for your approval, so you can start learning and earning.

Let's get started.

## Recap: What is an Experiment?

An Experiment is Persado's method of creating, testing, and broadcasting the precise words and phrases that will drive the most engagement with your audience. Because Experiments employ our principles of experimental design, they allow us to test thousands of permutations of a single message and gain feedback from your audience on what resonates with them and what doesn't.

Experiments are conducted in 6 key phases:

- Discovery
- Experiment Creation
- Experiment Execution (Exploration)
- Insights Analysis
- Broadcast Execution
- Results Analysis.

This guide focuses on how to execute step 1, Experiment Discovery, in the Persado Portal. This step provides the required inputs to the Persado team so step 2, Experiment Creation, can begin.



# Step-by-Step Guide

## 1. Prep for Your Experiment

Before jumping into the Persado Portal to request content, it's beneficial to have the following information ready to go:

- The control message/creative for the Experiment
- Your desired channel
- Send cadence and audience size
- Key KPIs and expected metrics
- Target deployment date for the Experiment.

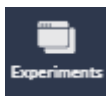
## 2. Log into Portal

Using your login credentials, log in to the [Persado Portal](#). You will automatically land on the homepage at the Portal Dashboard.

## 3. Load New Experiment Request Form

Once you are logged in, there are two ways to load the Experiment Request Form.

1. You can click the **Experiments icon**, the second icon from the top of the left-pane navigation toolbar. Once on this page, you will see a green box on the upper-righthand corner titled 'Request New Experiment.' Click this box to open the Form.



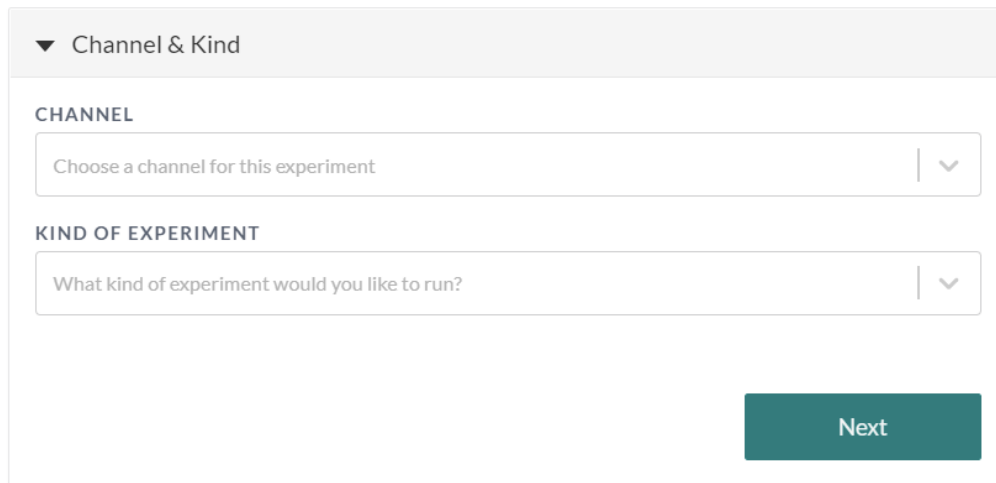
OR

2. You can click the **New Experiment icon**, the last icon on the left-pane toolbar, to open a new page with the Form.



## 4. Complete Initial Request Form Fields

When the new Experiment Request Form loads, you'll answer two questions to get started: your chosen **channel** for your Experiment, and the **type of Experiment** you'd like to run.



The screenshot shows a form section titled 'Channel & Kind' with a dropdown arrow. Below the title are two dropdown menus. The first is labeled 'CHANNEL' and has the placeholder text 'Choose a channel for this experiment'. The second is labeled 'KIND OF EXPERIMENT' and has the placeholder text 'What kind of experiment would you like to run?'. Both dropdowns have a small downward arrow icon on the right. At the bottom right of the form is a teal button labeled 'Next'.

Click on the dropdown buttons to show your options for channels and kinds of Experiments. Your channel options list the channels that Persado officially supports, where you intend to deploy your content. 'Kind of Experiment' is unique to Persado; these 5 Experiment types are defined as follows:

- **Exploration Only** - An Exploration is the first phase of testing in a Persado Experiment, when a variety of messages are sent to gain insights about their effectiveness for a given audience and context. The Exploration is sometimes referred to as the 'learning' phase. An Exploration Only Experiment contains only this first phase for each channel.
- **Full Experiment** - Our go-to for new content, Full Experiments include both Exploration ('learning') and Broadcast ('earning') phases. A Broadcast puts the best message(s) from the Exploration into market to deliver maximum impact for the given audience. A Full Experiment contains these two phases for each channel.
- **One-Step Experiment** - One-Step Experiments include both phases, Exploration and Broadcast, at once in a single deployment. This type of Experiment is best for high-cadence, high-volume campaigns with audiences and campaign types that have achieved sufficient machine-learning.
- **Personalized Content** - Personalized Content Experiments contain different messages targeting different groups of users, or Language Profile segments, evaluated by Persado's Data Science team. The Persado team will enable your Portal account with this option if you meet the criteria, as this typically requires 50+ completed Explorations.
- **Predictive Content** - Regular Experimentation gives us sufficient learnings to unlock Predictive Content. Predictive Content is powered by machine learning, where our AI picks concepts and phrases that are predicted to drive impact and

generates 1+ Variants. This type of Experiment is used when audience size, response rates, or time constraints do not allow for Exploration, or other technology limitations do not allow for testing of multiple Variants; it's ideal for campaigns that require rapid time-to-market. You will see this dropdown in your account if you meet the criteria.

If you are ever unsure of which type of Experiment to select, reach out to your Persado Customer Success Manager (CSM).

Once you've made your selections, click the green 'Next' button to work the remainder of the Form.

## 5. Complete Remaining Form Fields

Your Persado Customer Success Team now customizes your Experiment Request Form so you only have to populate a smaller number of fields to get started! Your Form will be unique to your needs, so don't worry if you don't see every field discussed here - the Persado team will make sure the Form is configured appropriately.

### Required Fields

Let's review the most commonly required fields in the Form. Required fields will always be marked with a red asterisk\*.

#### **EXPERIMENT NAME\***

Select a brief name for your Experiment. No need to get too creative here - if your team has standard naming conventions, like a brief title plus a date, that is an ideal name for an Experiment.

#### **CAMPAIGN\***

Select the campaign that your Experiment will belong to. Think of campaigns as 'buckets' that can house multiple Experiments. Nothing seems to be a match? No problem - create a new campaign that the Experiment resides in.

#### **CONTROL\***

Your control message is arguably the most important part of your Experiment request. The Persado team uses this control to create Variants of your message so we can test different elements of its composition, like if \$ off or % off is more effective, and to see which emotions resonate with your audience. With your control, we can measure the true impact of our optimized content. Controls can be uploaded in multiple file formats, such as JPG, PNG, or HTML.

#### **DEPLOY DATE AND TIME\***

Input the date when you need to deploy the Experiment and start learning what content is the most impactful for your audience. Once you submit, the Persado

team will use this information to consult on an implementation timeline.

## Optional Fields

While the optional fields in the Form are not required, populating them is an excellent way to give the Persado team more insight into your goals for the Experiment. Let's review some common optional fields.

### AUDIENCE SIZE

Enter your projected audience size in a numerical value format.

### SEGMENTS

If relevant to your campaign, select the audience segment that you wish to target from the drop-down menu. Note that you can choose more than one segment to target an even more specific population.

### ENGAGEMENT METRICS

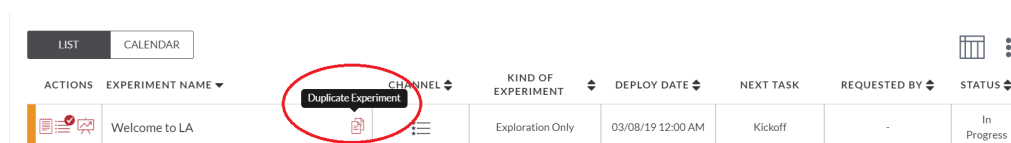
Enter your engagement metric in a quantifiable format. For example, you may be targeting an email open rate of 25%. Persado uses these metrics in order to understand how many binary actions (e.g., clicks, conversions) this campaign will see in-market and whether we can reach statistical significance.

### PRIMARY KPI

Enter the primary metric you will be using to measure the success of the campaign, along with any expected lift. For example, you may be interested in measuring orders, web-banner clicks, site visits, or email opens. Your primary KPI may be the same as your engagement or conversion metric.

## Hot Tip

Did you know that you can duplicate Experiments? If you've previously submitted an Experiment that you would like to use as a baseline, you can navigate to your 'Active Experiments' tab and hover over an Experiment name. Then, click on the document symbol to duplicate the Experiment request. This will automatically open up the Experiment Request Form you submitted for the prior Experiment, so all you need to do is make minor updates.



The screenshot shows a table with columns: ACTIONS, EXPERIMENT NAME, CHANNEL, KIND OF EXPERIMENT, DEPLOY DATE, NEXT TASK, REQUESTED BY, and STATUS. The first row has an icon in the ACTIONS column, 'Welcome to LA' in the EXPERIMENT NAME column, a document icon in the CHANNEL column (circled in red with the text 'Duplicate Experiment' above it), 'Exploration Only' in the KIND OF EXPERIMENT column, '03/08/19 12:00 AM' in the DEPLOY DATE column, 'Kickoff' in the NEXT TASK column, '-' in the REQUESTED BY column, and 'In Progress' in the STATUS column.

ACTIONS	EXPERIMENT NAME	CHANNEL	KIND OF EXPERIMENT	DEPLOY DATE	NEXT TASK	REQUESTED BY	STATUS
	Welcome to LA	Duplicate Experiment	Exploration Only	03/08/19 12:00 AM	Kickoff	-	In Progress

## 6. Save or Submit Your Experiment

Once you've completed all the required fields, and as many optional fields as desired, you will have the option to either 'Save' or 'Submit Request'.

Click 'Save' to save your request as a draft if you need to obtain more information or consult further with your internal team. You can return to your drafts at a later time by visiting your 'Pending Experiments' tab.

If you've filled out the form and are ready for the Persado team to get working, click the 'Submit Request' option for the Experiment to hop into our queue. Note that once you submit your request, you will not be able to edit it; however, you can add comments.



## 7. Congratulations! You've Requested Your Experiment

After your Persado team reviews your submitted materials, they will recommend a testing plan and timeline. Once the testing plan is agreed upon, your Persado team will move into the Experiment Creation phase, and your Experiment will move to the 'Active Experiments' tab.