

A/B Testing - Program Setup in Marketo

A/B testing is a crucial aspect of email marketing. As the name suggests, A/B testing allows you to send two or more variations of an email to different subscribers. According to the performance of these campaigns, you can then send the winning version to the remaining subscribers.

There are four ways to test the email in Marketo:

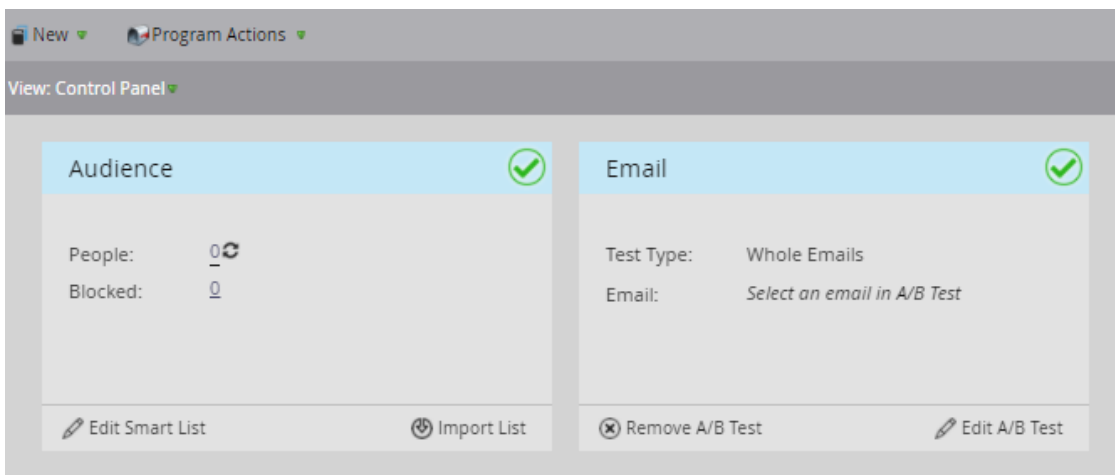
- Whole Email
- From Address
- Subject line
- Date/Time

It is mandatory to add “**ABProgram**” in the program name when creating any A/B test program. This helps in tracking engagement activity like open/click activity in the interesting moments of MSI.

Here are the steps to create a A/B Test program in Marketo:

Whole Email A/B Test

1. **Clone Whole A/B Test program from COE** (<https://engage-ab.marketo.com/?munchkinId=451-VAW-614#/classic/EBP8057A1>)
2. **Click on “Edit A/B Test” from the control panel.**



Note: When adding an A/B test, the selected email will no longer be available for use in any other program.

3. Select the emails for whole test email.

Marketo allows to add multiple emails, however, adding too many email can slow the testing process way down. We recommend to limit the testing to two emails.

Note: The emails should be in approved state to select them in test variant.

4. Drag the slider to choose what percentage of the audience you want to receive your A/B test and click **Next**.

It's highly recommended to choose small portion of sample size, so that winning email goes to vast majority of people. If there are any duplicate records in the database for targeted audience, those records will receive both th test and winning emails. To prevent this from happening, make sure to have clean data in your target list and avoid duplicates. In case if there are any duplicates, merge those contacts.

5. Define the A/B Test Winner Criteria

One can select the Winner Criteria based on the options listed in the below image.

Opens	An open registers when images are downloaded into an email. Even if you don't include an image, by default Marketo inserts a single tracking pixel into all HTML emails.
Clicks	By default, links in emails have tracking embedded in them allowing you to see who clicked which link, how many total links were clicked, etc.
Click to Open %	Percentage of emails that were opened and had a link clicked in the email. This measures the relevancy and context of an email by taking the number of unique clicks divided by the number of unique opens, and then multiplying by 100 to show it as a percentage.
Engagement Score	The engagement score helps you determine the effectiveness of your content.

For Engagement Score, the test will need to run for at least 24 hours.

Custom Conversion

If user don't want to go with any of following as winning criteria of sample test, user can select Custom Conversion.

Opens, Clicks, Click to Open %, Engagement Score.

Selecting Custom Conversion allows to pick any event as a conversion by using triggers and filters.

6. Declare Winner & Schedule the A/B Test

Once the A/B test is over, the winner can be declared in two ways

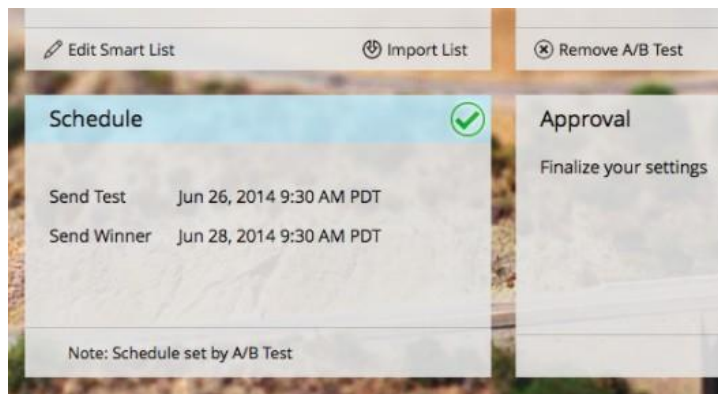
- **Automatic:** Marketo can automatically send the winning email at the scheduled time. Once **Automatic** chosen, set up the **Send Test** and **Send Winner** time.

- **Manual:** Selecting Manual will Allow the user to review the results and decide the winner. Select the Send Test (time), Send Report (time) and Send Report to (person email address who should receive the report).

Note: *Send Test* and *Send Winner* must be at least 4 hours apart. However, for larger sends, it's highly recommended to wait 24 hours to allow enough time to get good results.

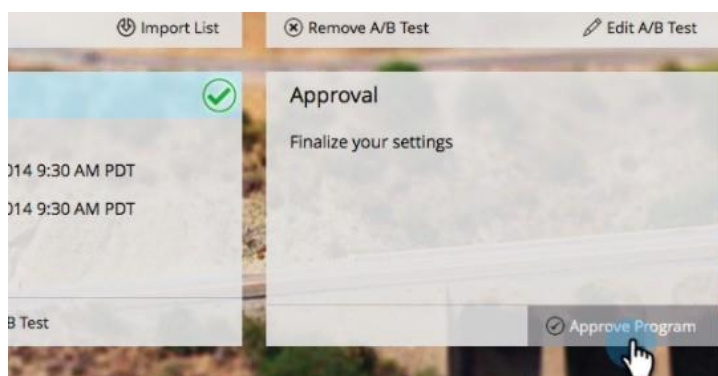
Note: If you are doing a **Date/Time A/B** test, you can only choose **Manual**.

Once A/B Test program is scheduled, click 'Close' and Schedule tile is now updated as shown below



7. Approve the program:

Assuming audience is defined and picked an email, the only step left is to approve the program. Under the **Approval** tile go ahead and click on **Approve Program**



8. Activate trigger campaigns for Open, Click

Separate trigger campaigns need to be setup in order to track the engagement activity like Opens and Clicks in Interesting Moments of MSI.

A. Opens Email

Under the trigger campaign “03|Open Email”, select the A/B Test email and all available test variants.

Note: Email can be selected only once A/B Test program is approved.

03|Opens Email Smart List Flow Schedule Results

New Campaign Actions View Campaign Members

Use ALL filters Collapse All Expand All

Opens Email

Add Constraint

Email: is LOB|YYYY.MM.DD|Custom Ne

Test Variant: is (2) Email A; Email B

Type the subject line of the emails inside "" and activate it. For example: **Opened Email: Subject Line: "Subject line"**

03|Opens Email Smart List Flow Schedule Results

New Campaign Actions View Campaign Members

Collapse All Expand All

1 - Interesting Moment

Add Choice

Type: Email Description: Opened Email: Subject Line: "Subject line"

A. Clicks link in Email

Under trigger campaign “04|Clicks link in Email”, select the email of Whole Email A/B Test program and select all test variants. Please ensure to update any links which are not considered as valuable clicks such as links under Disclaimer section as follows **Unsubscribe, preference, autclick, Privacy, mailto**

04|Clicks link in email Smart List Flow Schedule Results

New Campaign Actions View Campaign Members

Use ALL filters Collapse All Expand All

Clicks Link in Email

Add Constraint

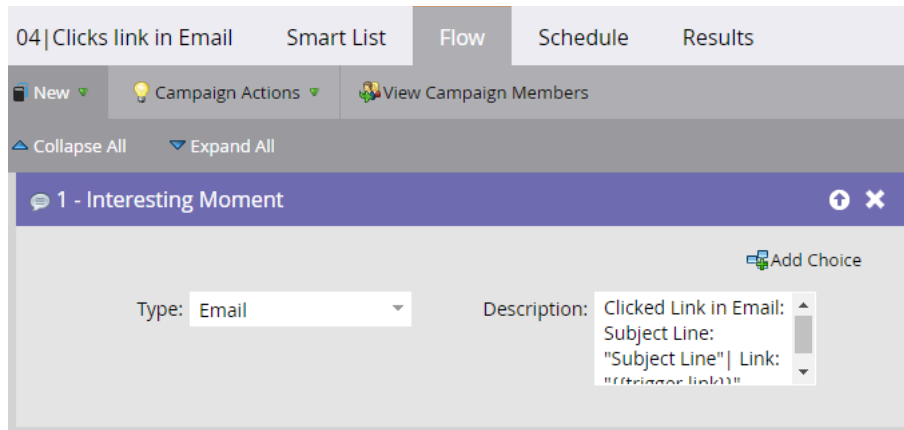
Email: is LOB|YYYY.MM.DD|Custom Ne

Link: not contains (5) Unsubscribe; preference; autclick;

Test Variant: is (2) Email A; Email B

Update the subject line inside "" as we suggested for the trigger **03|Open Email** and activate the campaign before program goes live.

For example: **Clicked Link in Email: Subject Line "Subject Line" | Link: "{{trigger.link}}"**



The screenshot shows a software interface for configuring a campaign. At the top, there are tabs for "04 | Clicks link in Email", "Smart List", "Flow", "Schedule", and "Results". Below the tabs, there are buttons for "New", "Campaign Actions", and "View Campaign Members". A "Collapse All" and "Expand All" option is visible. A purple header bar indicates "1 - Interesting Moment". Below this, there is an "Add Choice" button. The main configuration area has a "Type" dropdown set to "Email" and a "Description" field containing the text: "Clicked Link in Email: Subject Line: 'Subject Line' | Link: '{{trigger.link}}'".

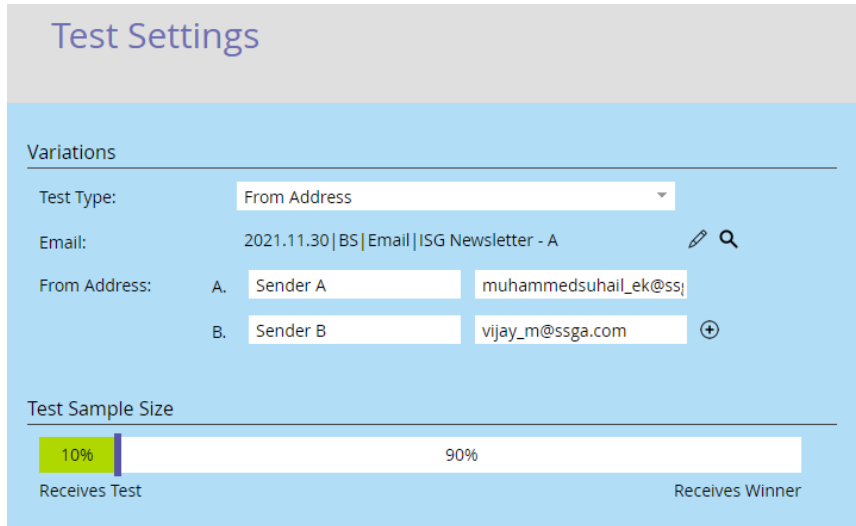
Note: Please make sure to keep single subject line for Whole Email A/B Test as we have separate test program for Subject line.

From Address A/B Test Program

1. Clone From Address A/B Test program from COE (<https://engage-ab.marketo.com/?munchkinId=451-VAW-614#/classic/EBP8058A1>)

2. Click on Edit “A/B Test” from the control panel and update sender email addresses.

Note: The email must be in approved state to select in the test variant.



3. Follow step we suggested above to define winner criteria, sample size, schedule time and approve the program.

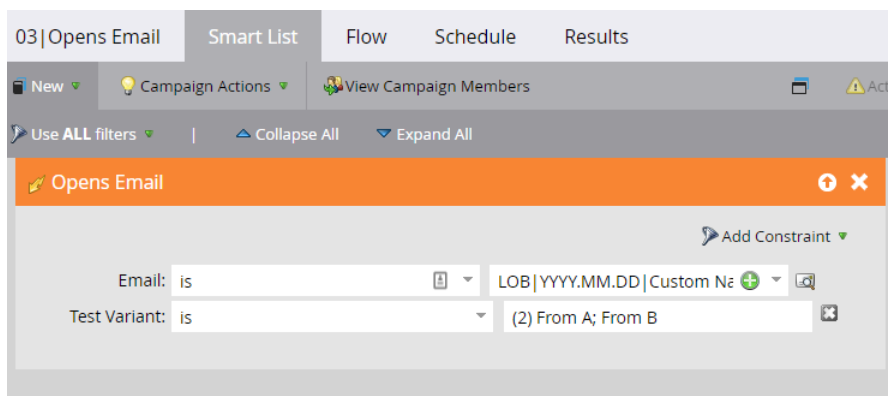
- [Select Sample size](#)
- [Define A/B Test Winner Criteria](#)
- [Declare Winner](#)
- [Schedule the A/B Test](#)

4. Activate trigger campaign.

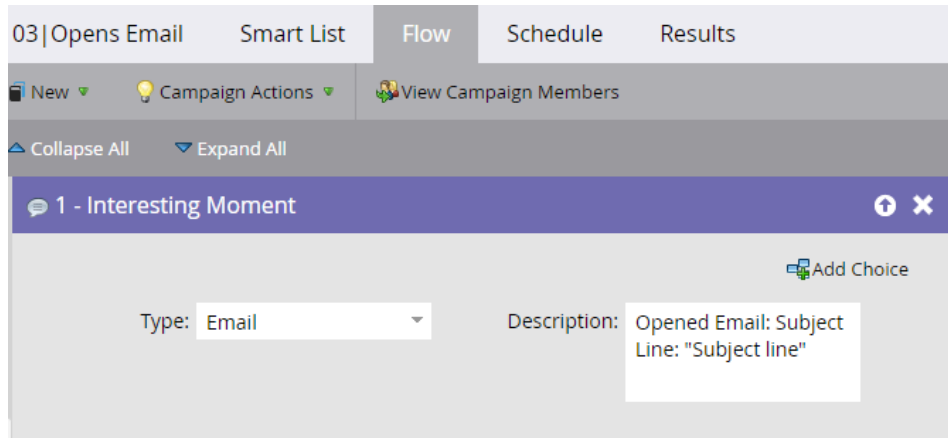
A. Open Email

Under the trigger campaign “03|Open Email”, select the A/B Test email and all available test variants.

Email can be selected only once A/B Test program is approved.

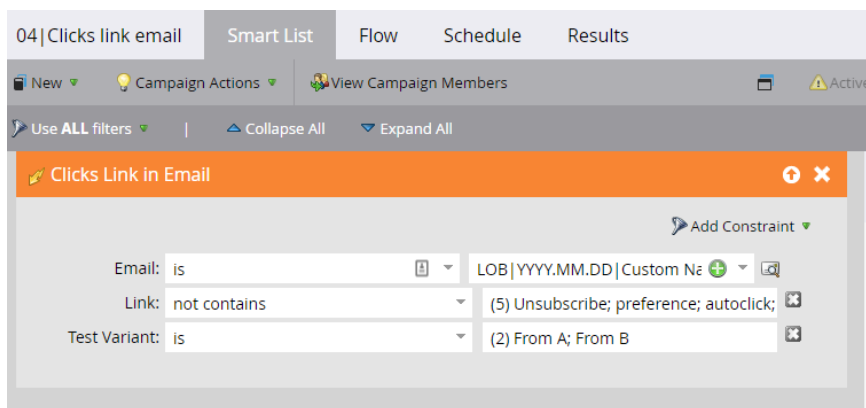


Type the subject line of the emails inside "" and activate it. Make sure to activate before the emails goes live. For example: **Opened Email: Subject Line: "Subject line"**

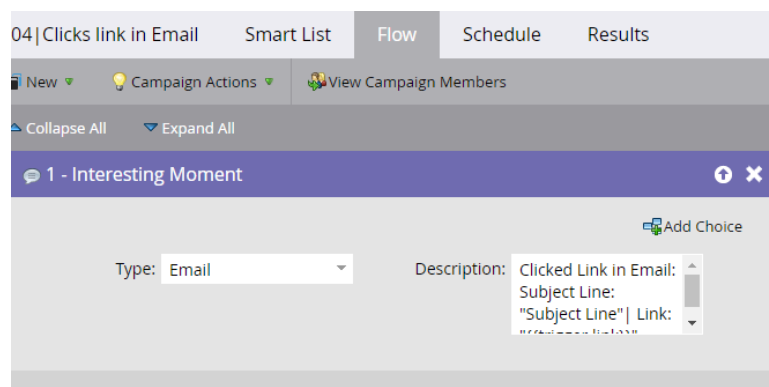


B. Clicks link in Email

Under trigger campaign "**04|Clicks link in Email**", select the email of **From Address A/B Test program** and select all test variants. Please ensure to update any links which are not considered as valuable clicks such as links under Disclaimer section as follows **Unsubscribe, preference, autclick, Privacy, mailto**



Update the subject line inside "" as we suggested for the trigger **03|Open Email** and activate the campaign before program goes live. For example: **Clicked Link in Email: Subject Line: "Subject Line"| Link: "{{trigger.link}}"**.



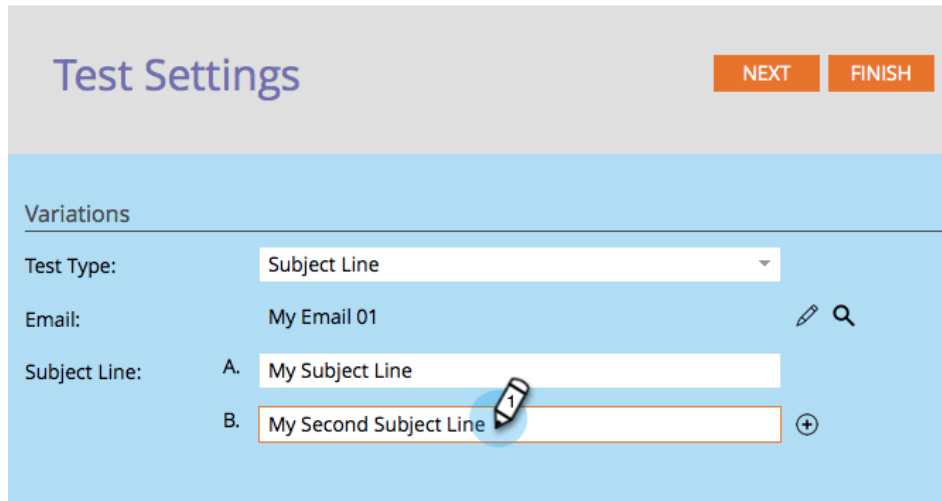
Subject Line A/B Test Program

1. **Clone Sender A/B Test program from COE** (<https://engage-ab.marketo.com/?munchkinId=451-VAW-614#/classic/EBP8059A1>)

2. **Click on Edit “A/B Test” from the control panel and update subject line.**

Note: Choice A will pre-populate with the information contained in the selected email and click on the + to add more subject lines,

Note: The email should be approved state to select them in Test variant.



The screenshot shows the 'Test Settings' interface. At the top right, there are 'NEXT' and 'FINISH' buttons. Below the title, there is a 'Variations' section. Under 'Variations', there are three rows: 'Test Type' with a dropdown menu set to 'Subject Line', 'Email' with the text 'My Email 01' and a search icon, and 'Subject Line' with two options: 'A. My Subject Line' and 'B. My Second Subject Line'. A plus icon is visible next to option B, and a cursor is hovering over it.

3. **Follow step we suggested above to define winner criteria, sample size, schedule time and approve the program.**

- [Select Sample size](#)
- [Define A/B Test Winner Criteria](#)
- [Declare Winner](#)
- [Schedule the A/B Test](#)

4. **Activate trigger campaigns**

Since **Subject line A/B Test program** has more than one single subject line, we have created 4 trigger campaigns as follows:

- I. Opens Email - Test Variant A
- II. Opens Email - Test Variant B
- III. Clicks link in Email - Test Variant A
- IV. Clicks link in Email - Test Variant B

Note: For this example, 2 subject lines are used for testing. Hence, we created 2 triggers each for opens and clicks. Similarly, the same number of triggers should be created for opens and clicks based on the number of subject lines tested.

I. Open Email – Test Variant A

Under the trigger campaign “03|Opens Email”, select the A/B Test email and select test variant A. Email can be selected only once A/B Test program is approved.

03|Opens Email - Test Variant A | Smart List | Flow | Schedule | Results

New Campaign Actions View Campaign Members

Use ALL filters Collapse All Expand All

Opens Email

Add Constraint

Email: is LOB|YYYY.MM.DD|Custom Ne

Test Variant: is Subject A

Type the subject line of Test Variant A inside “” and activate it. Make sure to activate before the emails goes live.

For example: **Opened Email: Subject Line: "Subject line -Test Variant A"**

03|Opens Email - Test Variant A | Smart List | Flow | Schedule | Results

New Campaign Actions View Campaign Members

Collapse All Expand All

1 - Interesting Moment

Add Choice

Type: Email Description: Opened Email: Subject Line: "Subject line -Test Variant A"

Subject A

II. Open Email – Test Variant B

Under the trigger campaign “04|Opens Email”, select the A/B Test email and select test variant B. Email can be selected only once A/B Test program is approved.

04|Opens Email - Test Variant B | Smart List | Flow | Schedule | Results

New Campaign Actions View Campaign Members

Use ALL filters Collapse All Expand All

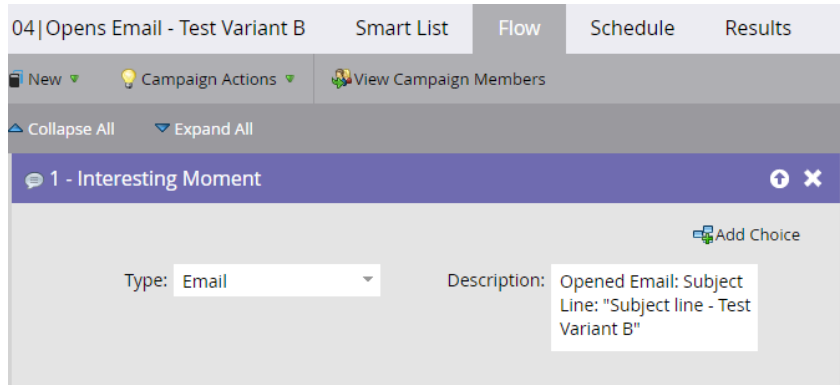
Opens Email

Add Constraint

Email: is LOB|YYYY.MM.DD|Custom Ne

Test Variant: is Subject B

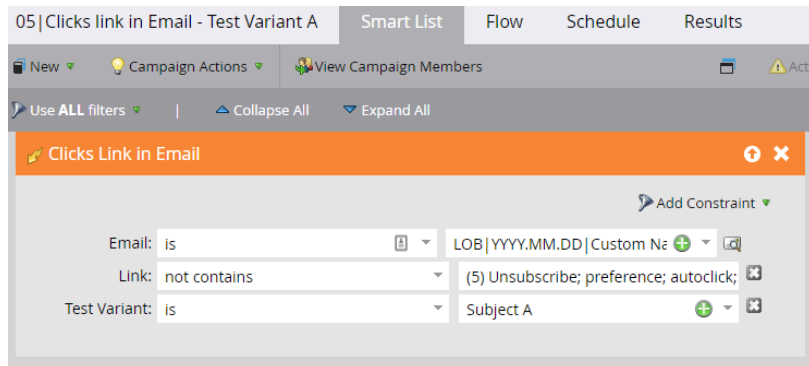
Type the subject line of Test Variant B inside “” and activate it. Make sure to activate before the emails goes live. For example: **Opened Email: Subject Line: "Subject line – Test Variant B"**



III. Clicks link in Email – Test Variant A

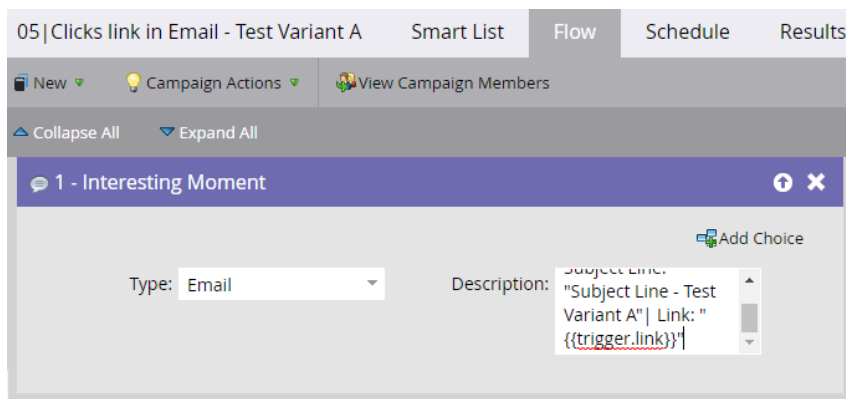
Under trigger campaign “05|Clicks link in Email- Test Variant A”, select the email of **Subject Line A/B Test program** and select all test variants.

Please ensure to update any links which are not considered as valuable clicks such as links under Disclaimer section as follows **Unsubscribe, preference, autclick, Privacy, mailto**.



Update the subject line inside “” as we suggested for the trigger **05|Clicks link in Email- Test Variant A** and activate the campaign before program goes live.

For example: **Clicked Link in Email: Subject Line: "Subject Line – Test Variant A"| Link: "{{trigger.link}}"**



IV. Clicks link in Email- Test Variant B

Under trigger campaign “06|Clicks link in Email- Test Variant B”, select the email of Subject line A/B Test program and select Test variant B

Please ensure to update any links which are not considered as valuable clicks such as links under Disclaimer section as follows **Unsubscribe, preference, autoclick, Privacy, mailto**

06|Click link in Email - Test Variant B | Smart List | Flow | Schedule | Results

New Campaign Actions View Campaign Members

Use ALL filters Collapse All Expand All

Clicks Link in Email

Add Constraint

Email: is LOB|YYYY.MM.DD|Custom N;
 Link: not contains (5) Unsubscribe; preference; autoclick;
 Test Variant: is Subject B

Update the subject line inside "" as we suggested for the trigger **06|Clicks link in Email – Test Variant B** and activate the campaign before program goes live.

For example: **Clicked Link in Email: Subject Line: "Subject Line – Test Variant B"| Link: "{{trigger.link}}"**

06|Clicks link in Email - Test Variant B | Smart List | Flow | Schedule | Results

New Campaign Actions View Campaign Members

Collapse All Expand All

1 - Interesting Moment

Add Choice

Type: Email Description: Clicked Link in Email: Subject Line: "Subject Line - Test Variant B"| Link: "{{trigger.link}}"

Date/Time A/B Test Program

1. Clone Date/Time A/B Test program from COE (<https://engage-ab.marketo.com/?munchkinId=451-VAW-614#/classic/EBP8060A1>)
2. Click on Edit “A/B Test” from the control panel and update subject line.

FYI, make sure to keep the email approved to select them in Test variant.

The screenshot displays the 'Test Settings' interface for a Date/Time A/B test. It includes the following fields and options:

- Test Type:** Date/Time
- Email:** 2021.11.30 | BS | Email | ISG Newsletter - A
- Variant A:**
 - Name: Date/Time 1
 - Date: 1/03/2022
 - Time: 15:38
 - Timezone: GMT
- Variant B:**
 - Name: Date/Time 2
 - Date: 31/03/2022
 - Time: 15:38
 - Timezone: GMT
- Test Sample Size:** A progress bar showing 10% (Receives Test) and 90% (Receives Winner).

3. Follow step we suggested above to define winner criteria, sample size, schedule time and approve the program.
 - [Select Sample size](#)
 - [Define A/B Test Winner Criteria](#)
 - [Declare Winner](#)
 - [Schedule the A/B Test](#)

*Note: If you are doing a **Date/Time** A/B test, you can only choose **Manual** in the Winner Criteria.*

4. Activate trigger campaigns

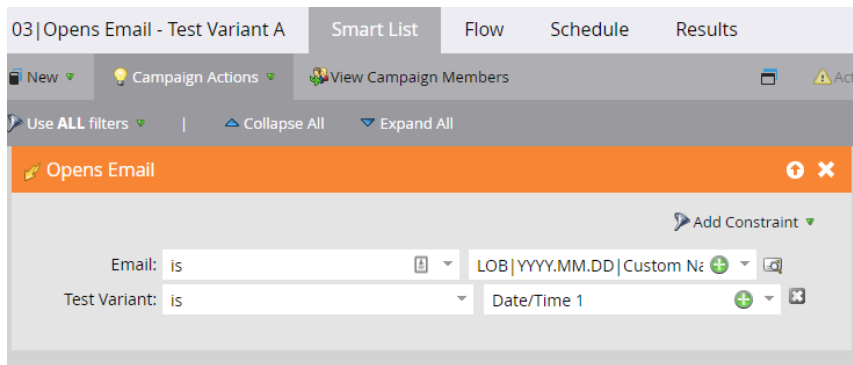
Since **Date/Time A/B Test program** is being sent out on different time, we have created 4 trigger campaigns to recognize the test variant:

- Opens Email - Test Variant A
- Opens Email - Test Variant B
- Clicks link in Email - Test Variant A
- Clicks link in Email - Test Variant B

A. Open Email – Test Variant A

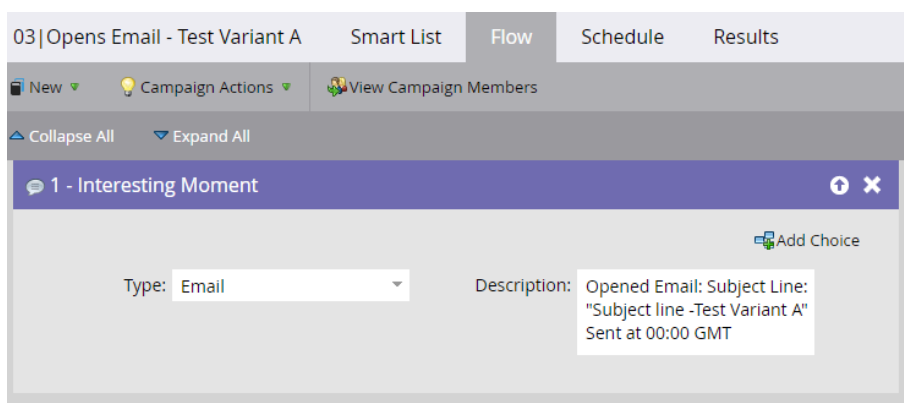
Under the trigger campaign “**03|Open Email- Test Variant A**”, select the A/B Test email and select **Date/Time 1**.

Email can be selected only once A/B Test program is approved.



Type the subject line of Test Variant A inside "" and update the time activate it. Make sure to activate before the emails goes live.

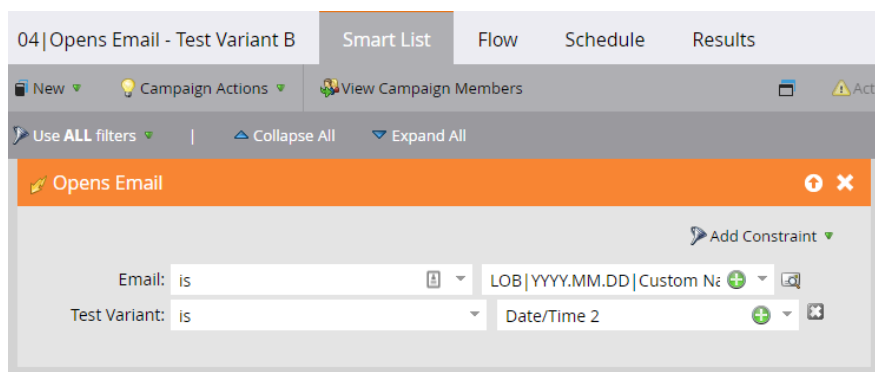
For example: **Opened Email: Subject Line: "Subject line -Test Variant A" sent at 00:00 GMT"**



B. Open Email – Test Variant B

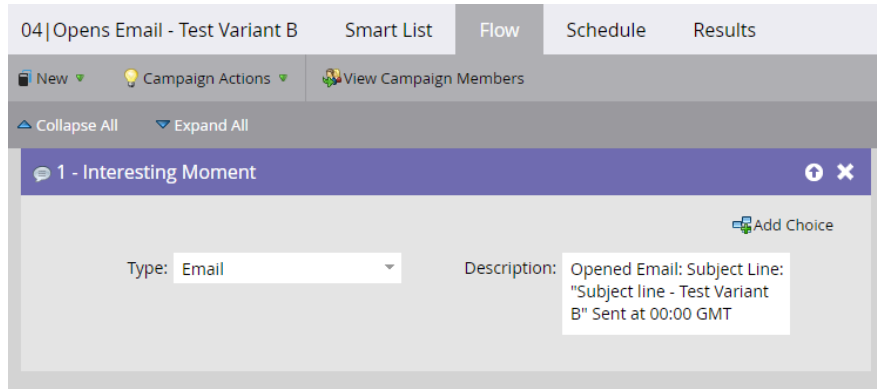
Under the trigger campaign "04|Open Email- Test Variant B", select the A/B Test email and select **Date/Time 2**.

Email can be selected only once A/B Test program is approved.



Type the subject line of Test Variant A inside "" , send time, and then activate it. Make sure to activate before the emails goes live.

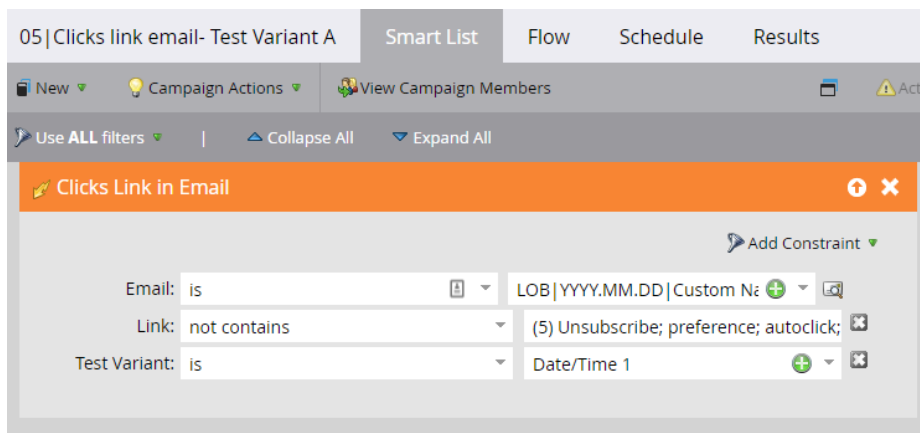
For example: **Opened Email: Subject Line: "Subject line – Test Variant B" Sent at 00:00 GMT"**



C. Clicks link in Email A

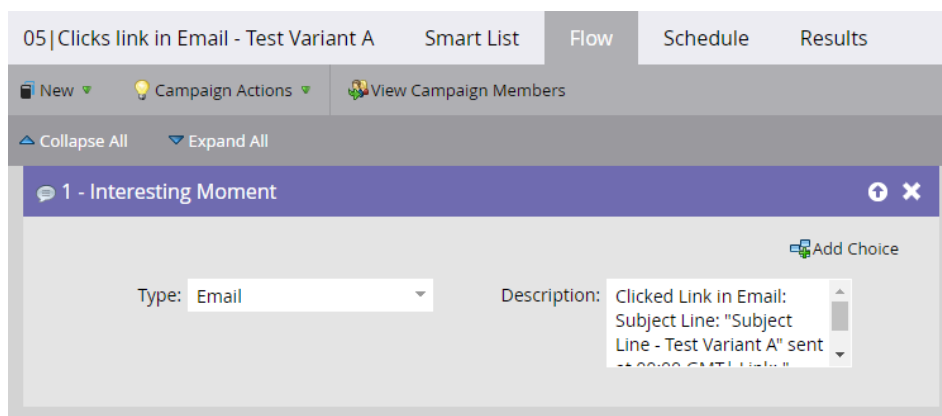
Under trigger campaign “**05|Clicks link in Email**”, select the email of **Date/Time A/B Test program** and select test **Date/Time 1**.

Please ensure to update any links which are not considered as valuable clicks such as links under Disclaimer section as follows **Unsubscribe, preference, autoclick, Privacy, mailto**



Update the subject line inside “” and sent time as we suggested for the trigger **06|Clicks link in Email- Test Variant A** and activate the campaign before program goes live.

For example: **Clicked Link in Email: Subject Line: "Subject Line – Test Variant A" sent at 00:00 GMT"**
Link: "{{trigger.link}}"



D. Clicks link in Email B

Under trigger campaign “07|Clicks link in Email – Test Variant B”, select the email of **Date/Time Email A/B Test program** and select **Date/Time 2**.

Please ensure to update any links which are not considered as valuable clicks such as links under Disclaimer section as follows **Unsubscribe, preference, autoclick, Privacy, mailto**

Email	Link	Test Variant
is	is not	is

Add Constraint ▼
 LOB|YYYY.MM.DD|Custom N: +
 (5) Unsubscribe; preference; autoclick; +
 Date/Time 2 +

Type the subject line of Test Variant A inside “” and activate it. Make sure to activate before the emails goes live.

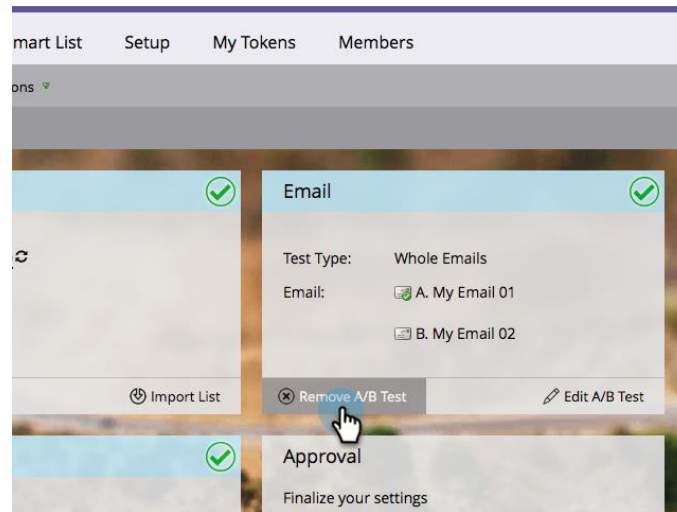
For example: **Clicked Link in Email: Subject Line: "Subject Line – Test Variant B" sent at 00:00 GMT"| Link: "{{trigger.link}}"**

Type	Description
Email	Clicked Link in Email: Subject Line: "Subject Line - Test Variant B" sent at 00:00 GMT Link: {{trigger.link}}

Add Choice

Cancel the A/B Test

Under the **Email** tile, click **Remove A/B Test**.



Note: The program must be unapproved before you can remove the A/B test