

OPTIMIZEZY PLATFORM CERTIFICATION
STUDY GUIDE



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Purpose

This Study Guide is intended to help you prepare for the Optimizely Platform Assessment. This document is broken out into important content areas that you will need to know for the exam. Within each content area, you will find a list of key concepts, links to relevant Knowledge Base articles, and links to relevant Academy Lessons. The Study Guide is continually being revised and improved. When preparing for the exam, please remember to check success.optimizely.com for the most up-to-date version.

Target Audience

If you are preparing for the Platform Certification, then this guide is for you. Regardless of your prior training and experience, this document will help you learn and/or review concepts required for the exam. It is designed to help you pass your exam. Please contact certification@optimizely.com if you have any questions or would like to provide feedback.

In general, there are four main sources that you can reference to find answers and prepare for the exam:

- [Optimizely 101 interactive e-learning](#)
- [The Knowledge Base](#)
- [Optimizely Academy](#)
- [Optimizely Community](#)

Section 1: How Optimizely works

Key Concepts to Know:

- A/B, multivariate, and multi-page tests
- How Optimizely runs on your site
- How unique visitors are counted in Optimizely
- What is the Javascript API?
- What is the Rest API and what can you do with it?

Knowledge Base Articles

- [How does Optimizely work?](#)
- [Experiment Types](#)
- [Multi-page \(Funnel\) experiments](#)
- [Multivariate Tests](#)
- [Frequently Asked Questions](#)

Academy Articles

- [Single Page A/B Tests](#)
- [Experiment Types](#)

Section 2: The Home page & The Snippet

Key Concepts to Know:

- Difference between the Account, Project, and Experiment levels
- User roles and permission levels available for different subscription types
- Scheduling Experiments
- Capabilities of the Home page
- Steps required to implement the Optimizely snippet
- Pros/cons of using a Tag Manager to implement the snippet

Knowledge Base Articles

- [Manage Projects and Experiments](#)
- [Manage collaborators and user roles](#)
- [The Home page](#)
- [The Experiment Scheduler](#)
- [Implement the Optimizely Snippet](#)

Academy Articles

- [Implementing the Snippet](#)

Section 3: The Visual Editor

Key Concepts to Know:

- Editing capabilities available within the Optimizely visual editor
- Pros/cons of using the visual editor vs. writing your own code within the “Edit Code” feature
- Activation mode
- Best practices for using the editor and for running experiments
- Conditions required for loading your webpage into the editor

Knowledge Base Articles

- [The Visual Editor](#)
- [The Code Editor](#)
- [Activation Mode](#)
- [Loading content in the Editor](#)
- [Responsive design within the Editor](#)

Academy Articles

- [Getting the most from the Visual Editor](#)
- [Setting Up a Basic Experiment](#)
- [Editor Best Practices](#)
- [Change an Element Sitewide](#)
- [Behind the Scenes of the Editor](#)
- [The Edit Code Box](#)

Section 4: Audiences and Integrations

Key Concepts to Know:

- Options for creating Audiences
- The difference between Audiences, Segments, and Dimensions
- The types of integrations available in Optimizely
- What are the implementation requirements for pushing Optimizely information to two of the most popular integrations, Google Analytics and Adobe Analytics? For example, is there an order of events required to make the implementation work? Don't worry about actually setting up the reports within the analytics platforms themselves.

Knowledge Base Articles

- [Audiences: Choose which visitors to include](#)
- [Dimensions: Capture visitor data through the API](#)
- [Introduction to Optimizely Integrations](#)
- [Analytics Integration Overview](#)
- [Integrating Optimizely with Google Universal Analytics](#) and [Classic](#)
- [Integrating Optimizely with Adobe Analytics](#)

Academy Lessons

- [Integrating with Analytics Platforms](#)

Section 5: Traffic Allocation and URL Targeting

Key Concepts to Know:

- Differences between each of the match types for URL Targeting:
 - Simple match
 - Exact match
 - Substring match
 - Regular Expression match
- How to allocate traffic to different variations and the affect it has on your experiment, especially if it is already running

Knowledge Base Articles

- [URL Targeting](#)
- [Traffic Allocation](#)

Academy Articles

- [URL Targeting](#)
- [Six Crucial Steps in Every Experiment](#)

Section 6: Track Goals

Key Concepts to Know:

- Click tracking goals and goal targeting, Pageview goals, Custom Event goals, and Revenue tracking
- Best practices and use-cases for using each of the above goal types
- How goal conversions are tracked on the results page
- Tracking clicks on redirect tests
- How a Primary Goal differs from other Goals

Knowledge Base Articles

- [Goals Overview](#)
- [Click goals](#)
- [Pageview goals](#)
- [Revenue Tracking](#)
- [Tracking clicks on a redirect page and pages outside of your experiment](#)

Academy Lessons

- [Six Crucial Steps in Every Experiment](#)
- [Single Page A/B tests](#)
- [Redirect Tests](#)

Section 7: Preview and QA

Key Concepts to Know:

- Options for previewing and testing an experiment before starting it
- Functionality available within the Optimizely preview feature

Knowledge Base Articles

- [Preview mode and QA](#)
- [Forcing a specific variation to run with query string parameters](#)

Academy Articles

- [Previewing and Testing Experiments](#)
- [QA Your Experiment](#)

Section 8: Results and Statistical Significance

Key Concepts to Know

- Conversion rates on the results page
- Using Custom Dimensions to capture visitor data
- How are visitors and conversions calculated within Optimizely?
- Custom Segments and Default Segments
- How Optimizely's Stats Engine works

Knowledge Base Articles

- [The Results Page](#)
- [Segment your Results](#)
- [Stats Engine: How Optimizely calculates results to enable business decisions](#)

Academy Lessons

- [How Optimizely Collects Results](#)
- [Interpreting More Complex Results](#)

Section 9: Settings

Key Concepts to Know

- The difference between IP filtering and IP targeting
- What it means to mask descriptive names
- Disabling the Force Parameter
- Where Experiment JavaScript executes on the page

Knowledge Base Articles

- [Project Settings](#)