Optimizely Web Personalization Resources

Welcome to the help guide for Personalization.

Here you'll find resources that help you instrument your site, create campaigns, and deliver personalized experiences. If this is your first time using Optimizely, jumpstart your setup with this guide.

Other ways to learn:

- Take the new Academy course for a self-paced tutorial on how to launch your personalization campaigns and get ideas specific to your industry.

Prepare your site

Before you build your first campaign, you'll need to do a few important things:

- **Optimizely snippet**: A non-technical explanation of how Optimizely works.
- **Implement the snippet**: Add one line of code to run experiments on your site (skip this if you're already using Optimizely).
- **Configure the snippet for Optimizely Web**: Enable the right snippet configuration.
- **How the Optimizely snippet works**: Learn about the order of execution.
- **Prepare Optimizely for your site**: Set your site up for fast, flexible personalization.
• **Manage users and collaborators in Optimizely:** Set permission levels for your team.
• **Manage projects and experiments in Optimizely:** Divide your account into workspaces with different sets of collaborators and snippets.
• **Pages:** Decide where you’ll personalize your site.
• **Events:** Track what visitors do on your site and use events to deliver behaviorally-targeted experiences.
• **Tags:** Track how visitors interact with pieces of your site and use tags for behavioral targeting.
• **Audiences:** Decide who you’ll deliver personalized site experiences to.
• **Cookies and localStorage in the Optimizely snippet:** Learn about the cookies that Optimizely uses.

Create campaigns & experiences

Create your campaigns and tailor the experiences with the Editor:

• Read the [Six Core Concepts of Personalization](#) before getting started.
• [Create a Campaign in Optimizely Personalization](#): Quickly pull all the pieces of your setup into a new campaign.
• [Editor and custom code](#): Create a personalized experience for your site.
• [Extensions and reusable templates](#): Add reusable templates like carousels, banners, and lightboxes to the Editor.
• **Holdback:** Measure overall impact of personalization: Decide on a percentage of visitors who won’t see a personalized experience.
Ideas to help you get started:

- Inspiration for Personalization
- Generate better ideas and experiment everywhere
- Strategy essentials: Personalization
- Plan a messaging matrix for personalization
- Build experimentation into personalization campaigns

QA and troubleshoot

Use these techniques to make sure your experiment works the way you'd like:

- QA in Optimizely Web: Avoid publishing a bad experience; make sure everything looks and works the way you’d like.
- Troubleshooting in Optimizely: Identify and fix issues with your campaign.
- Troubleshooting: You’re not seeing the right experience in a campaign: Walk through a series of checks if you don’t see the experience you expect.
- Advanced QA with the JS API, console log, and network panel: Dig into deeper issues with advanced techniques.

Turn results into action

Dive into results to measure the impact of your campaign and learn more about your visitors:

- The Optimizely Results page: Track how your personalized experiences perform.
- Take action based on results: Build on winning variations, learn from losing ones, and iterate.
- Segment your results: Don’t miss out on insights about specific groups of visitors.
• **Iterate on campaigns and share results in Personalization:** Close the loop on Personalization and iterate based on your results.

Grow your optimization program:

Use the [Optimization Methodology](#) as a guide to building a strong, impactful optimization program.

We’ve put together the most essential content here, but there’s way more. Use Optiverse search to find more resources.