Evaluating testing solutions:

Pivotal questions to ask during the RFP process

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Introduction

Testing to see what works and what doesn't work in physical stores can be costly, difficult, and inefficient, but it doesn't have to be. With an automated, intuitive tool, testing can both increase ROI and be straightforward – empowering prompt, profitable, data-driven decisions across your organization.

Not all in-store testing solutions are equal. Choosing the right one for your business is crucial to standardizing processes throughout your company, increasing revenue, and avoiding weak initiatives by providing reliable failure foresight.

At MarketDial, we believe that no matter where your organization currently falls on the testing spectrum – from newbie to advanced – you will benefit from adopting enhanced in-store testing capabilities with the most modern testing platform on the market. Which is why MarketDial recommends retailers put software to

the test with a proof of concept that can prove positive outcomes across systems, people, and processes *before* investment – and why we offer a complimentary proof of concept as part of the selection process.

In addition, to assist you in the RFP stage and to ensure you are getting the optimal solution for your business, we've generated a comprehensive list of questions for you to consider when selecting an in-store test-and-analyze solution.

Essential questions: Product features

Automated, accurate data science backed by machine-learning algorithms should be the backbone of any test-and-analyze software.

Sample sizing

1. How does your platform help users determine optimal sample size?
2. Explain how models such as machine learning are used to automate sample size selection.

Control matching

1. How do you ensure that control selection provides unbiased, consistent results?
2. How does your tool recommend the best strategy for control matching?
3. How does your platform automate the matching of control and test groups to ensure comparability?
4. What statistical techniques are used to validate that control groups are adequately matched to test groups?

Test store selection

1. How does your platform ensure that the sample groups used in A/B tests are representative of the entire customer population?
2. What methodologies does your platform employ to account for demographic and behavioral differences across store locations?

Confidence indicators

1. What statistical confidence indicators does your platform provide to assess the validity of test results?
2. How does your platform adjust for multiple testing scenarios to maintain the integrity of confidence levels?

Basket comparisons analytics

1. How does your platform analyze and compare shopping basket contents?
2. What metrics does your platform use to measure the differences in basket compositions and values?

Lift granularity analytics

1. How does your platform measure and report on lift at different levels of granularity (e.g., product, category, store)?
2. What methods are used to ensure that lift measurements are statistically significant and not due to random variation?

Test ROI and rollout impact analytics

1. How does your platform calculate the return on investment (ROI) for in-store tests?
2. What analytics are provided to predict and measure the impact of rolling out successful tests across all stores?

Outlier detection

1. How does your platform identify and handle outliers in test data to ensure robust results?
2. What criteria are used to determine whether an outlier should be excluded or included in the final analysis?

Essential questions: Data integration

It's important to know how readily a testing platform can organize your data feeds and if they provide on-going data hygiene. Is your testing partner willing to support your data needs throughout the testing process, or do they ultimately expect your data to support their processes?

Cost

1. What is the cost structure for integration with our data system?
2. What additional costs are incurred for unique, specific, or complicated data integration feeds. What data integration services incur additional costs?
3. Are there add-on fees for continued data management?

Flexibility

1. What happens if you want to add a new data feed, and what are the costs associated with that data source.
2. Can you describe a scenario where you adapted your platform to meet a client's specific data integration challenges?
3. Describe the options you offer for integration with our data systems (e.g., flat file sharing, direct DB connection, APIs, etc.)? What cost is associated with each?
4. Can you accommodate daily and weekly feeds?

Speed

1. How quickly can your platform integrate with our existing systems and begin delivering actionable insights?
2. What steps are involved in the integration process, and what is the typical timeline for each step?

Data management

1. What data management capabilities does your platform offer to ensure data accuracy and integrity, and are there extra charges incurred for data integration and management?
2. How does your platform handle data cleaning, transformation, and normalization during the integration process?

Workload

1. What specific tasks does your platform handle to minimize the workload on internal teams during integration?
2. Can you provide examples of how your platform has simplified complex data integration tasks for other clients?

Proof of concept

1. What does your free proof of concept entail, and how long does it typically take to complete?
2. Can you provide examples of successful proofs of concept with retailers similar to us? ⠴⠇

Essential questions: Usability

When platforms are user friendly, testing can be integrated into every aspect of the business, increasing not only the number of users and in-store tests run annually but also the overall efficiency and productivity of all retail decisioning.

User-friendly design

1. How does your platform ensure an intuitive and user-friendly interface for users with varying technical skills?
2. Can you provide examples of user feedback that led to design improvements in your platform?

Multi-user

1. How does your tool help maintain consistent methodology across use cases and teams?
2. How does your platform support multi-user access and collaboration, and what permissions or role-based access controls are available?
3. Can you provide examples of how your platform has facilitated teamwork and collaboration for other clients?
4. How many departments can utilize the software?
5. How many users can the platform support?

Easy training and onboarding

1. What training resources and support does your platform offer to ensure quick and efficient onboarding for new users?
2. What is the timeline for getting a new user proficient in the software, and what skills do new users need?
3. Can you provide examples of how you have tailored training programs to meet the needs of different client teams?

Data sharing

1. What features does your platform offer to facilitate secure and efficient data sharing between users and teams?
2. How does your platform ensure data privacy and security during data sharing processes?

Increased capacity

1. How many tests can be run annually?
2. How does your platform scale to handle increased data volume and user activity without compromising performance?
3. Can you provide case studies or examples where your platform successfully managed a significant increase in capacity?
4. How does the platform enable data and testing to be democratized across a business.

Streamlined communication

1. How does your platform support and streamline communication between users, particularly for discussing test results and insights?
2. Can you provide examples of built-in communication tools or integrations with popular communication platforms?

Collaboration

1. What collaboration tools does your platform provide to enhance teamwork and joint problem-solving?
2. Can you share examples of how your platform has improved collaboration among cross-functional teams for other clients?
3. How willing are you to co-developing features to fit client needs?
4. Can you describe a situation in which you were able to support a client with an outside-the-box testing challenge?
5. How do you adapt or respond to unusual testing requests?

Essential questions: Support

Everyone flourishes with adequate support. Experts can benefit from engaging with other experts in their field, and novices can benefit from gleaning expert insights. Whether you need someone to assist with establishing test parameters, interpreting results, generating effective hypotheses, or answering technical questions, the best platform combines automation with personalization.

Strategic support

Ensure that support services empower long-term success and align with your overall business strategy.

Regular business reviews

1. How often do you run strategic reviews, and who is your audience? Are there add-on fees for this?
2. What topics are typically covered during your Quarterly Business Reviews (QBRs), and how do they help in aligning your platform's performance with our business goals?
3. Can you provide examples of actionable insights or strategic recommendations that have resulted from previous QBRs with other clients?

Testing advocacy

1. How do you ensure wide-spread adoption and knowledge of testing as a practice?
2. How do you work with other teams to garner support and achieve testing buy-in across the organization?

Designated client success manager

1. What is the profile of the designated account manager that would serve my account?
2. How many hours of client support are offered? Is there a quota? Is client support metered or unlimited?
3. To what extent does client support assist with each of the following:
   o Implementation?
   o Test setup?
   o Test protocols and best practices?
   o Result analytics?

Professional services

Ensure that support services also focus on resolving immediate technical issues and guiding a smooth operation of products.

Client check-ins

1. What types of touch bases do you have with your clients?
2. How do you support ongoing client success and issue resolution?
3. Can you share examples of how you have helped other clients to continuously improve their use of your platform?

24/7 Support

1. What is your protocol for providing 24/7 support, and how do you ensure timely and effective resolution at all times?
2. Can you provide metrics or examples demonstrating the responsiveness and effectivenss of your support services?

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One of the things we have found with MarketDial is that they re invested in our success. They want to be a great partner, and they want to be on the ground, making sure that everything that we want to do can be done in their platform.

—Keegan Magee, Director of Analytics and Insights, DICK'S Sporting Goods

Why MarketDial?

MarketDial delivers decision intelligence by automating the data science behind in-store A/B testing. Retailers can now accurately measure ROI, enabling them to know on a small scale what changes will have big-scale impacts before full-scale rollout. For any retailer asking, "*What if,*" MarketDial provides the answers.