Setting up Personalisation A/B test with Google Tag Manager

Overview

If you like to perform A/B test for serving search and category navigation with and without personalisation, please continue to read the following guide.

Google Tag Manager (aka GTM), is one of the popular tools that allows you to monitor consumer activities on a website, including what they search, click and buy. From the GTM's perspective, monitoring such activities is a process called setting up "tags" in GTM. For every tag setup in GTM, Google provides a snippet of code to be included on your website. This code is responsible for sending the required data to Google.

In this document, we provide information on setting up Google Tag Manager to perform A/B testing for Personalisation.

It is, basically, a three steps process:

1. Setting up a Google Tag Manager (GTM) account
2. Setting up GTM testing environment (i.e. obtaining snippets of codes to include on your website)
3. Verifying if the data is submitted to Google Analytics as expected

Setting up a Google Tag Manager account

If you already have a GTM account, please log in to it. Otherwise, please follow the steps mentioned at https://support.google.com/tagmanager/answer/6103696#CreatingAnAccount to create a new GTM account.

Once the account is created, you need to add a container for your website. A container is just a collection of tags that you like to add to your website (e.g. for measuring analytics, AdWords conversions, etc). Please follow the steps at the following link to create a new container for your website: https://support.google.com/tagmanager/answer/6103696#AddingTheContainerSnippet

Setting up A/B Testing

There are two types of tags we need to create:
1. Dynamically enabling and disabling Klevu Advanced Personalisation
2. Sending this data to your Google Analytics account about which users are using Personalisation and which aren't.
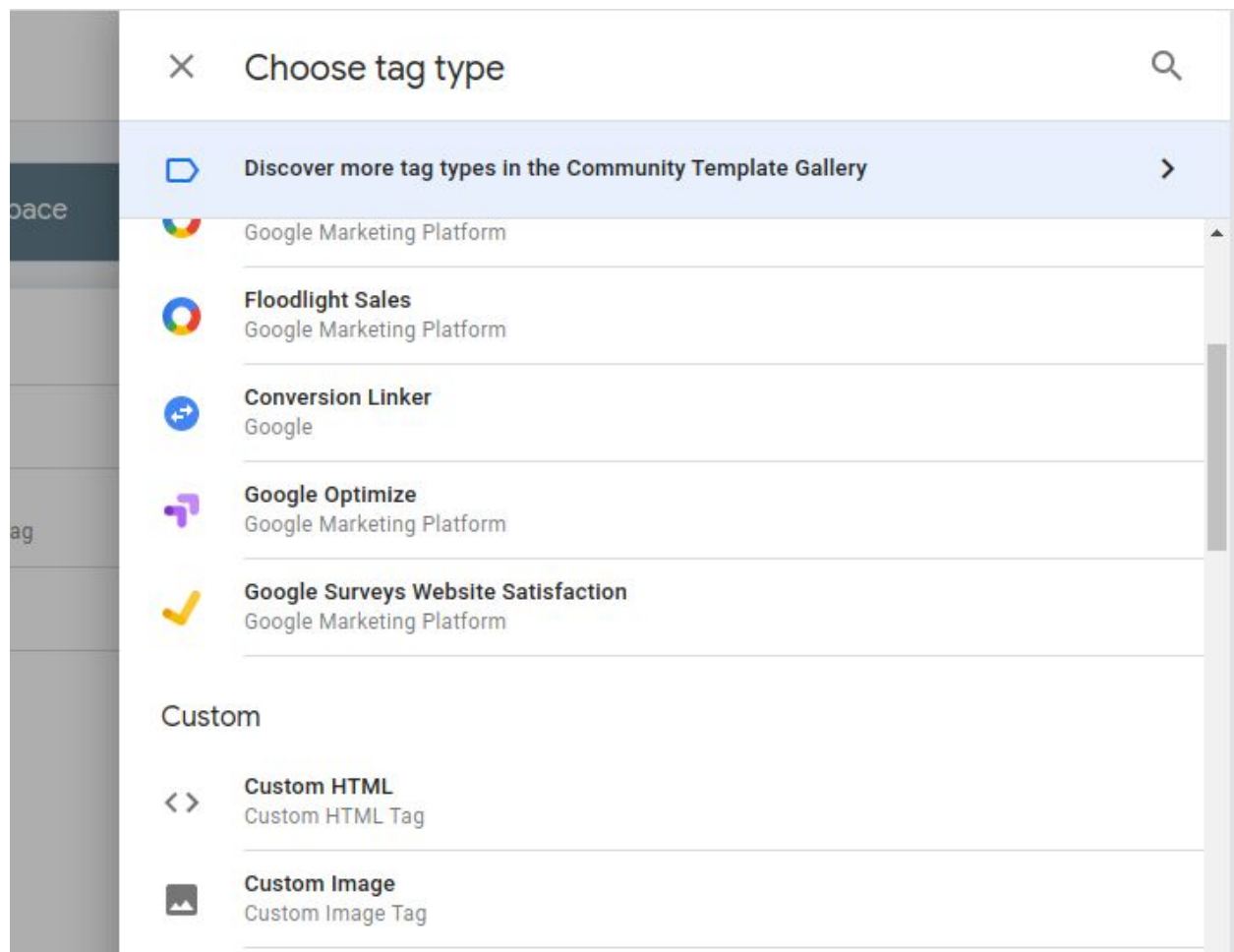
Creating a tag for dynamically enabling and disabling Klevu Advanced Personalisation

1. Login into your Google Tag Manager
2. Click on the **Tags**
   a. Click on the **NEW** button. This should open up a screen like the following:
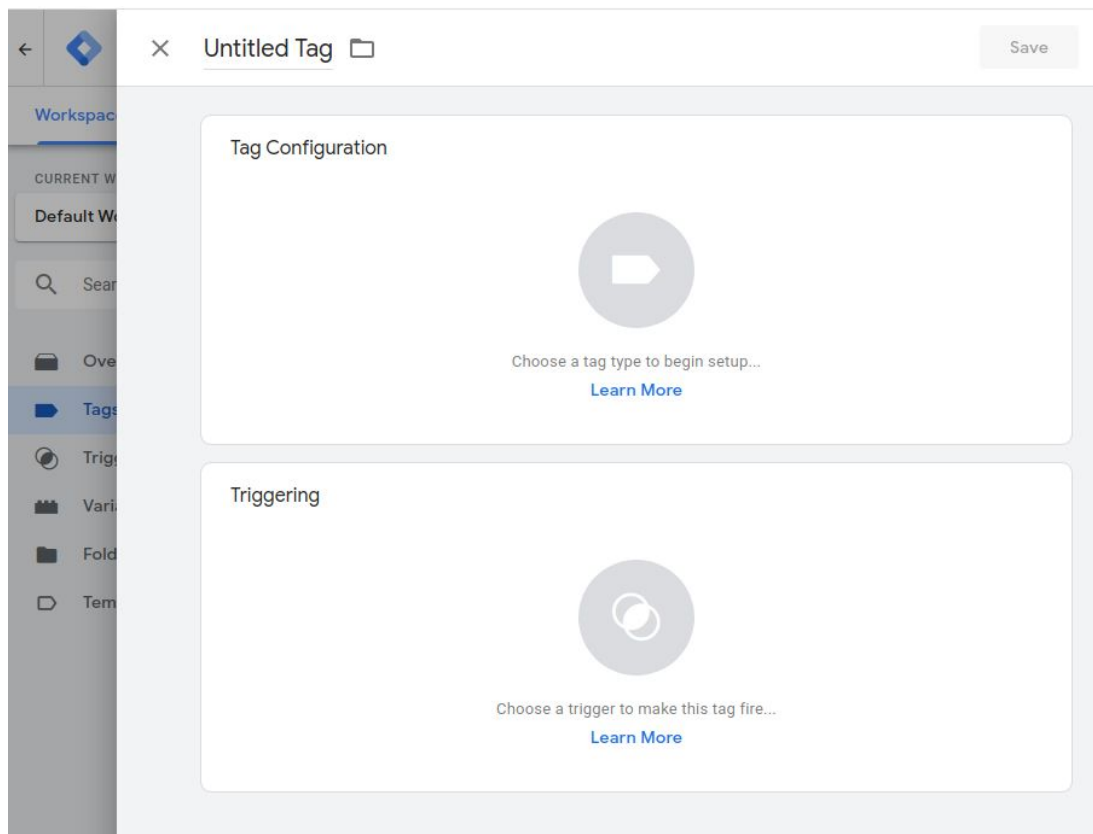
Here,
   i. Give a name **Klevu Personalisation AB Test**
   ii. select **Custom HTML** under the Tag Configuration.

b. This will show the **HTML** section, where we request you to copy - paste the following code. But before you do so, please ensure to specify your *Google Analytics ID* (marked RED in the code below). It should start with two capital letters followed by a dash and a few numbers (e.g. **UA-XXXXXX-X**)

```
<script src="//onlinedialogue.s3.amazonaws.com/gtmtesting.js"></script>
<script>
od_test_id = "AB-Klevu-001",
od_twin_id = "",
od_test_name = "Klevu Search AB Test",
od_variations_count = 2,
od_exposure_rate = 100,
od_traffic_allocate = [50,50],
od_cookie_days = 60,
od_cookie_path = "/",
od_analytics = "universal",
od_analytics_id = "UA-XXXXXX-X",
od_go_live_date = "",
od_go_offline_date = "",
od_reset_date = "";
od_incl_jquery = 0;
var klevu_customEnableAdvancedPersonalisation=true;
var od_variation_description = "Klevu Advanced Personalisation Enabled";

function control() {
  od_variation_description = "Klevu Advanced Personalisation Enabled";
  klevu_customEnableAdvancedPersonalisation=true;
}

function variationB() {
  od_variation_description = "Klevu Advanced Personalisation Disabled";
  klevu_customEnableAdvancedPersonalisation=false;
}

od_initializeConfig();
od_loadTest();

dataLayer.push({
  "event" : "call_gtmtesting",
  "personalisationValue": od_variation_description,
  "eventCategory": "Klevu Personalisation Search"
});
</script>
```
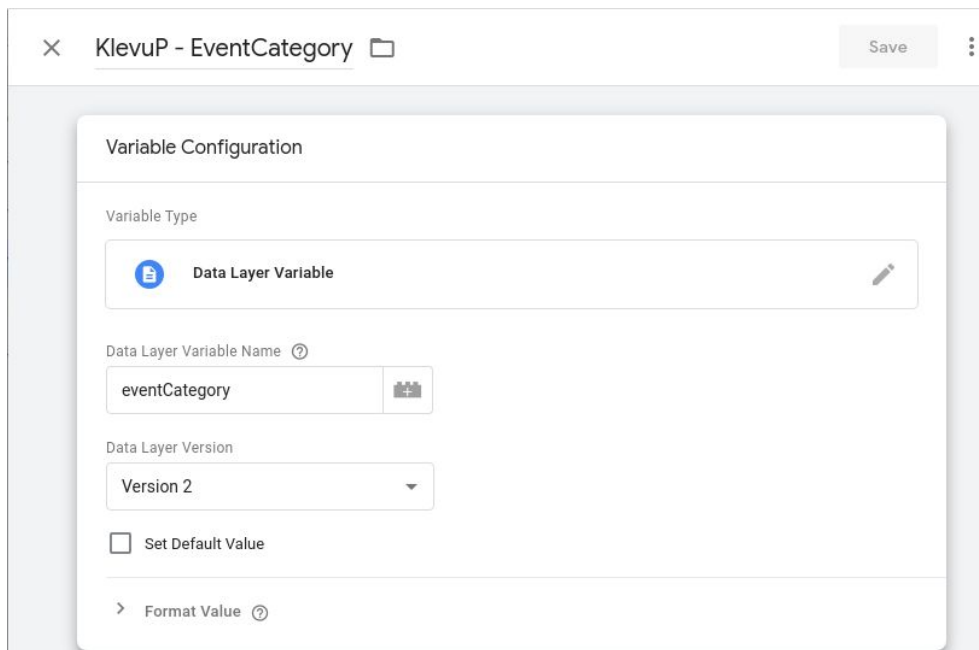
c. On this screen still, click on the **Triggering** option. It shall open up a new window to create a new trigger.
   i. Name it **A/B Trigger Klevu**
   ii. Select trigger Type to be **DOM Ready** (under the **Page View** section)
   iii. Select **ALL DOM Ready Events** as an option for **This trigger fires on.**
   iv. Save it and come out on the **Tags** screen.

Sending events of enabling/disabling Klevu Personalisation to Google Analytics

This step is very important as otherwise, you would not know which customers were served with personalisation enabled vs disabled.
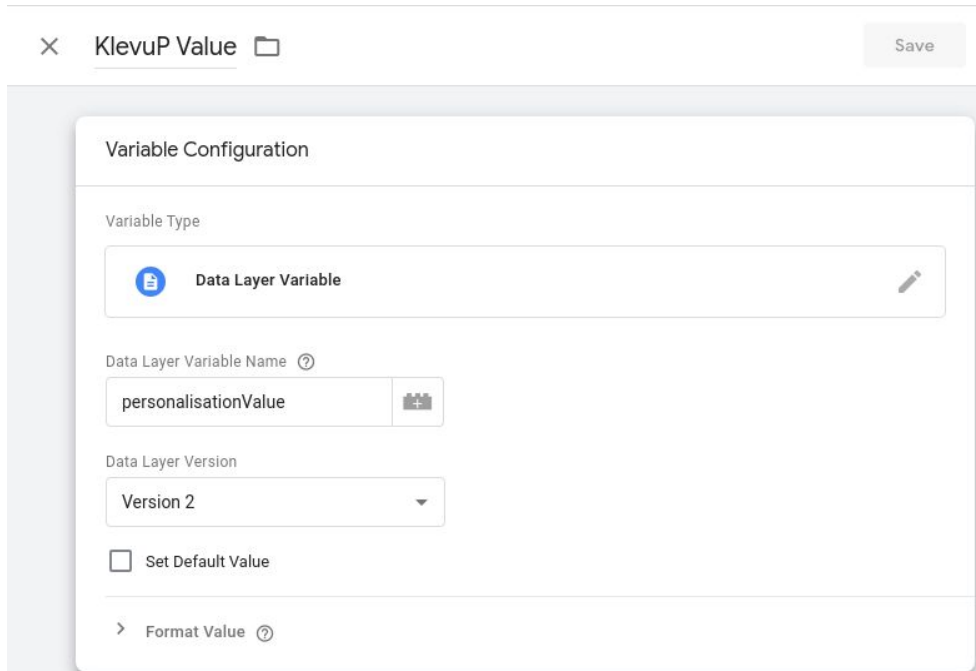
1. If not already logged in, please login to Google Tag Manager
2. Click on the **Variables** option
   a. Under the **User-Defined Variables** section, click on **NEW**
      i. Name the variable as **KlevuP - EventCategory**
      ii. Variable Type should be set as **Data Layer Variable** (found under **Page Variables**)
      iii. **Data Layer Variable Name** should be set to **eventCategory**
      iv. **Data Layer Version** should be **Version 2**
      v. Click on the **Save** button
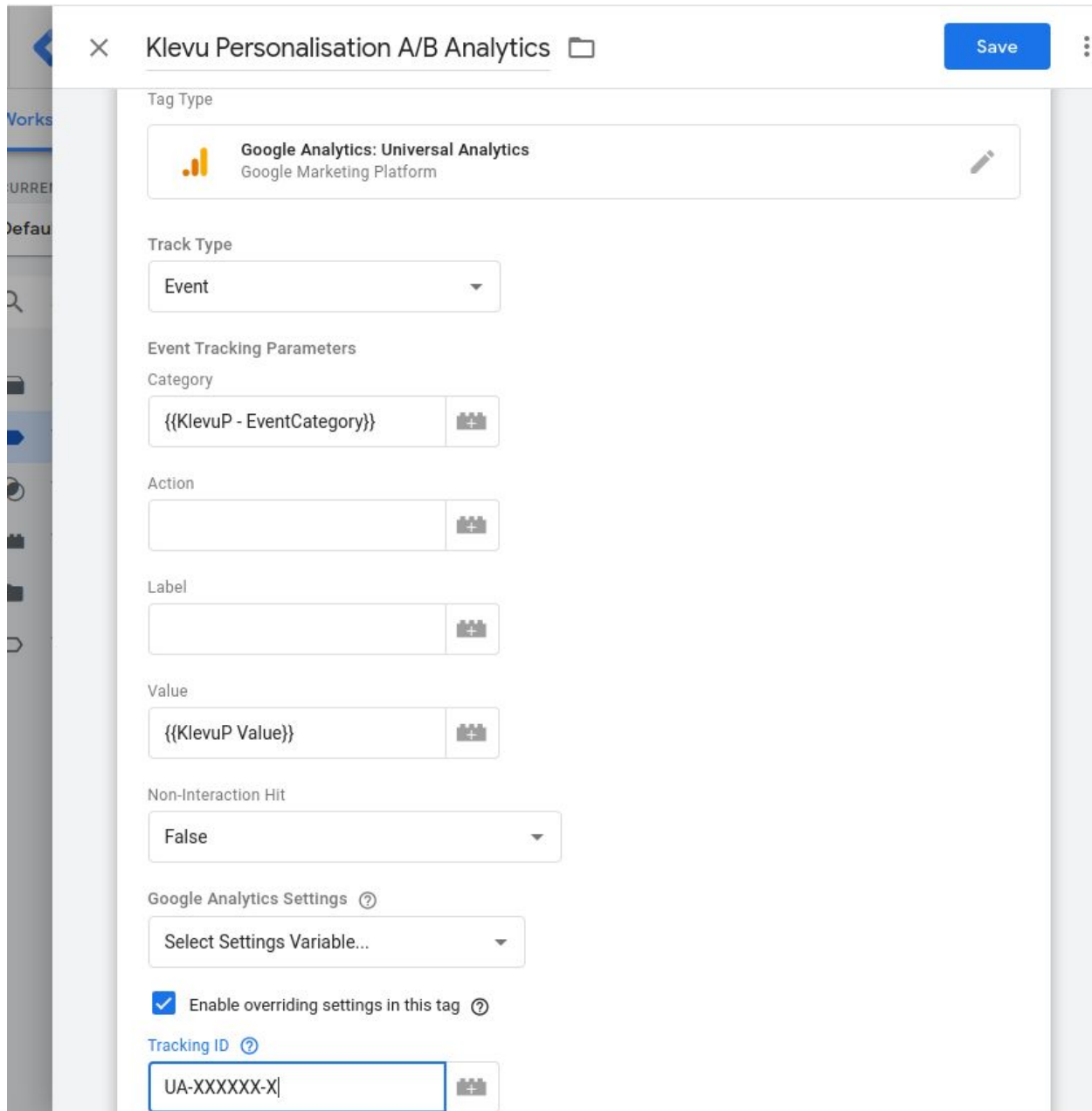
b. We need to repeat the same steps for creating another variable. Under the **User-Defined Variables** section, click on **NEW**
   i. Name the variable as **KlevuP Value**
   ii. Variable Type should be set as **Data Layer Variable** (found under **Page Variables**)
   iii. **Data Layer Variable Name** should be set to **personalisationValue**
   iv. **Data Layer Version** should be **Version 2**
   v. Click on the **Save** button

3. Clicks on the **Tags** option
4. Click on the **NEW** button
   a. Name the tag as **Klevu Personalisation A/B Analytics**
   b. For the **Tag type,** select **Google Analytics: Universal Analytics** option
   c. This should open up a few drop downs
      i. **Track Type** should be set to **Event**
      ii. Under the Event Tracking Parameters
         1. For the **Category** parameter, enter **{{KlevuP - EventCategory}}**
         2. For the **Value** parameter, enter **{{KlevuP Value}}**
         3. **Non-Interaction Hit** should be set to **False**.
         4. Tick the option "**Enable overriding settings in this tag**". This should show you one drop down called "**Tracking ID**". Please enter your **Google Analytics ID** here (e.g. UA-XXXXXX-X). This ID should match the value entered in the code snipped in the step specified earlier.
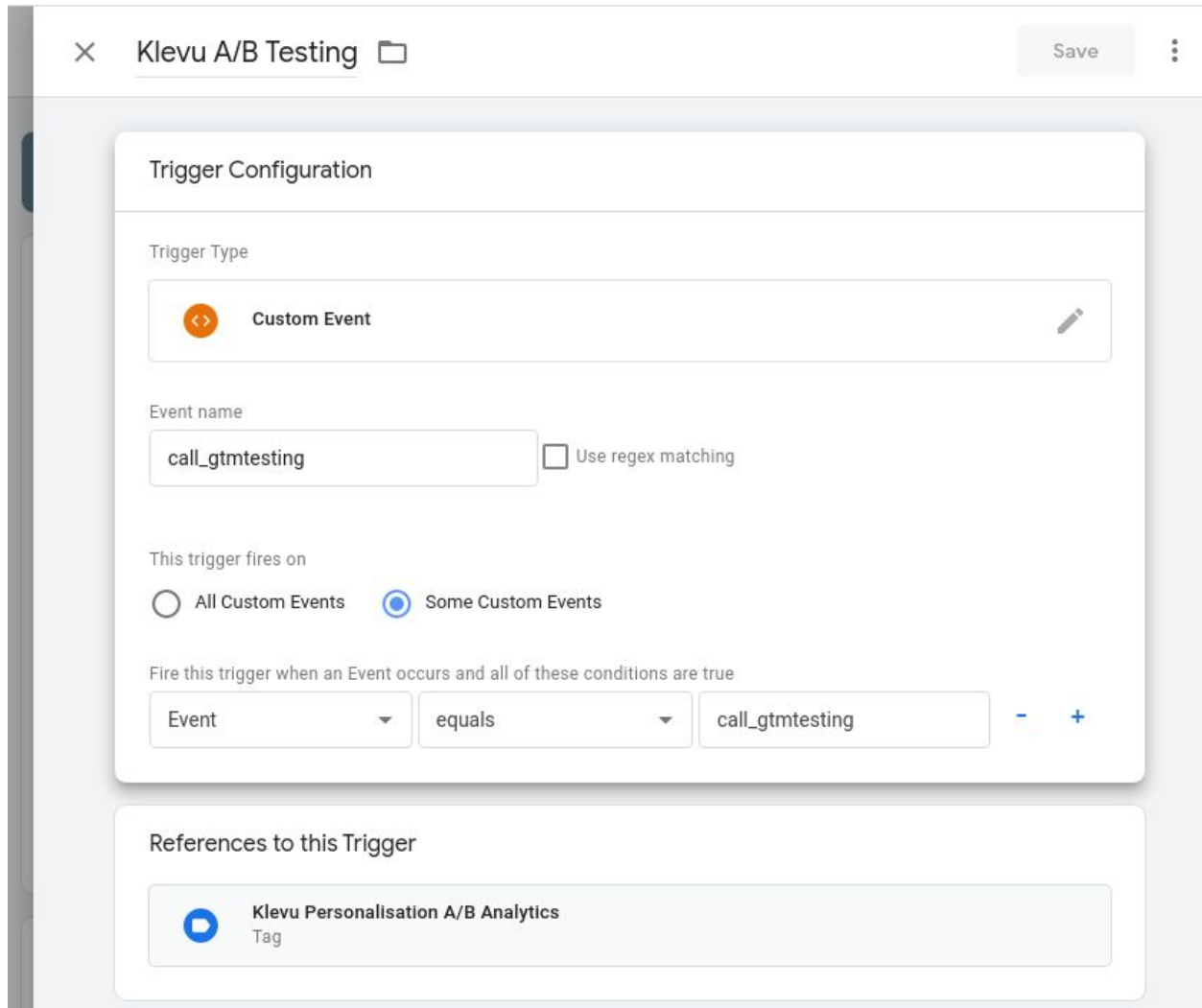
iii. Click on the **Triggering (Firing Triggers option**). This should open up a window to create a new trigger.
1. Name it **Klevu A/B Testing**
2. Trigger type should be set to **Custom Event**
3. **Event name** must be **call_gtmtesting**
4. Select "**Some Custom Events**" as the option for **This trigger fires on**

5. Under "Fire this trigger when an Event occurs and all of these conditions are true" option
   a. Choose **Event**
   b. Choose **equals**
   c. Write **call_gtmtesting** in the text box
6. It should look like the following. If so, click on the **Save** button.

5. Come out on the main screen and **Submit** your changes.

Verifying your Google Analytics A/B Test

1. Submitting some data to track
    a. Open a new incognito window or refresh your browser pressing Ctrl + F5.
    b. Go to your website and fire a search query.
2. Login into your Google Analytics account (e.g. https://analytics.google.com)
3. Go to **Realtime** ⇒ **Events** section.
    a. You should now see a category called "**Klevu Personalisation Search**" with a column "Value" with either "Klevu Advanced Personalisation Enabled" or "Klevu Advanced Personalisation Disabled" options.
    b. Based on this data, you should be able to create segments and checkout activity, conversion rate etc for different users.