Sitecore E-Commerce Fundamental Edition 1.1

# Sitecore E-Commerce OMS Cookbook

*A marketer's guide to the Sitecore E-Commerce Fundamental Edition and the OMS*

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# Chapter 1

## Introduction

The Sitecore E-Commerce Fundamental Edition is a fully functional webshop product that allows you to rapidly develop and deploy an end-to-end e-commerce solution..

This manual describes how marketer's and webshop managers can utilize the Sitecore Online Marketing Suite (OMS) in combination with the E-Commerce Fundamental Edition to analyze the shopping behavior of customers and to assess the overall effectiveness of your e-commerce website with the aim of increasing ROI (return on investment).

The topics covered include analyzing webshop traffic and visitor behavior using OMS reports, visitor profiling, setting goals, managing campaigns and creating visitor personalization.

In this manual, we use a very basic sample webshop that sells photographic equipment to illustrate the functionality in Sitecore E-Commerce Fundamental Edition and Sitecore OMS. This sample site consists of just a few simple pages.

This manual contains the following chapters:

- **Chapter 1 — Introduction**
  This is a brief description of the manual, its aims, and its intended audience.
- **Chapter 2 — Analyzing Visitor Behavior**
  This chapter explains how to use Sitecore OMS and web forms reports with Sitecore E-Commerce Fundamental Edition.
- **Chapter 3 — E-Commerce and the Online Marketing Suite**
  This chapter explains how you can use different features and functionality in Sitecore OMS with Sitecore E-Commerce Fundamental Edition.

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# Chapter 2

## Analyzing Visitor Behavior

This chapter explains how to use Sitecore OMS reports with the Sitecore E-Commerce Fundamental Edition.

OMS reports enable you to analyze the effectiveness of your e-commerce website and track the shopping behavior of your customers.

This chapter contains the following sections:

- OMS Reports
- Web Forms Reports
- Filtering Reports

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## 2.1 OMS Reports

In the Sitecore E-Commerce Fundamental Edition, you can use standard Sitecore Analytics OMS reports to track customer behavior.

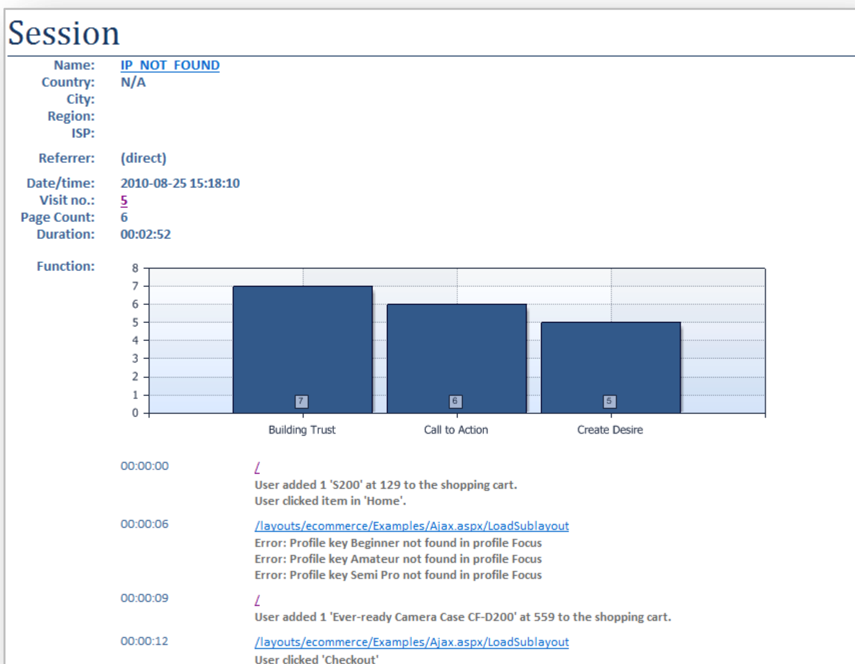
Sitecore OMS lets you track a customer's behavior as they make their way through the shopping process. The *Latest Human Sessions* report lists all visitor sessions and all pages visited during each session. This includes all items added to the shopping cart and all purchases made by each visitor. The session trail displays the visitor's IP address and organization name, but individual customer names are not included in the standard OMS reports.

### 2.1.1 Latest Human Sessions Report

In Sitecore Analytics, under *Recent Activity*, the *Latest Human Sessions* report gives you detailed visitor information, a breakdown of the pages visited (the session trail), along with any information entered on forms in your webshop.

#### The Session Report

A typical session report for SEFE sample pages showing visitor information and the URLs of all pages accessed during one session:




The standard visitor information displayed on the session report includes:

- Name — the name of the company or organization.
- Country — the country that the visit originated from (based on the IP address).
- ISP — the name of the visitor's Internet Service Provider.

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- Date/time — the date stamp of the visit.
- Duration — the length of time that the visit lasted.
- Profile values — bar charts illustrating the accumulated visitor profile scores for each profile key.

When you use SEFE with the OMS, the session report also includes useful additional information about the customer's shopping activities such as:

- Products viewed.
- Products added to the shopping cart.
- Stages completed in the checkout process.
- Forms accessed.
- Information entered into form fields.
- Changes made before submitting a form.
- Form validation error messages.

For example, when a customer adds a product to the shopping cart, this appears in the session trail. If a customer adds a product to the shopping cart, this triggers a Sitecore page event. You can configure your e-commerce installation to show all the page events in the session trail or decide which ones you want to show.

**Note**
If you decide to display all Page Events on the *Latest Human Session* report, this can affect the performance of your e-commerce website.

## Analyzing E-Commerce Web Forms

When a customer completes a form on your webshop, all the form values that they enter appear in the session report. This includes any changes they made and any validation error messages displayed during the session.

In the following example, a visitor has selected some products and proceeded through the checkout process. You can see the products they added to the shopping cart and all pages they accessed during the checkout process. All the values entered by the visitor in the various forms also appear in the session

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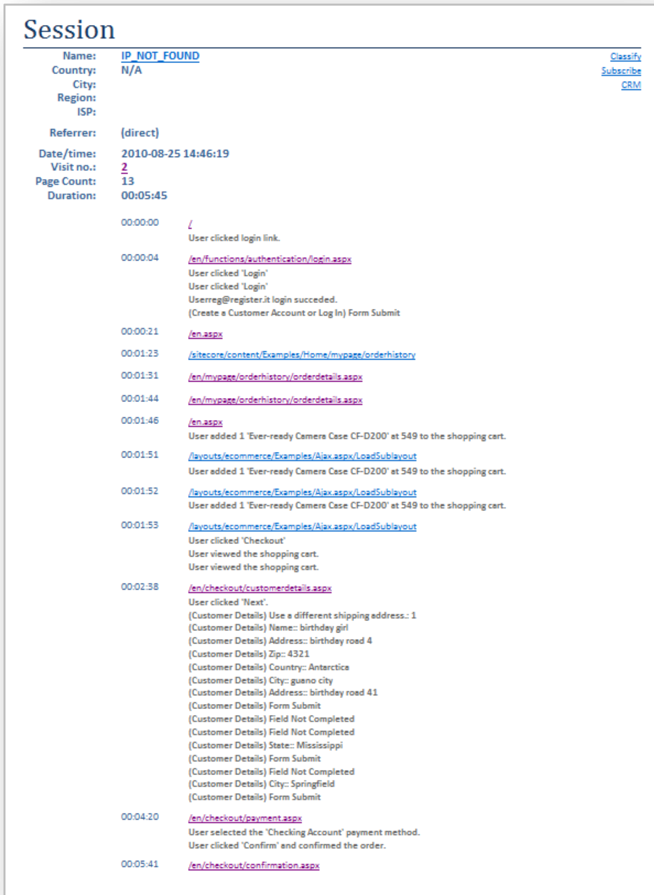
report, including a small change that the visitor made to the *Address* field.



Session

Name: IP_NOT_FOUND
Country: N/A
City:
Region:
ISP:

Classify
Subscribe
CRM

Referrer: (direct)

Date/time: 2010-08-25 14:46:19
Visit no.: 2
Page Count: 13
Duration: 00:05:45

00:00:00 /
User clicked login link.

00:00:04 /en/functions/authentication/login.aspx
User clicked 'Login'
User clicked 'Login'
Userreg@register.it login succeded.
(Create a Customer Account or Log In) Form Submit

00:00:21 /en.aspx

00:01:23 /sitecore/content/Examples/Home/mypage/orderhistory

00:01:31 /en/mypage/orderhistory/orderdetails.aspx

00:01:44 /en/mypage/orderhistory/orderdetails.aspx

00:01:46 /en.aspx
User added 1 'Ever-ready Camera Case CF-D200' at 549 to the shopping cart.

00:01:51 /layouts/ecommerce/Examples/Ajax.aspx/LoadSublayout
User added 1 'Ever-ready Camera Case CF-D200' at 549 to the shopping cart.

00:01:52 /layouts/ecommerce/Examples/Ajax.aspx/LoadSublayout
User added 1 'Ever-ready Camera Case CF-D200' at 549 to the shopping cart.

00:01:53 /layouts/ecommerce/Examples/Ajax.aspx/LoadSublayout
User clicked 'Checkout'
User viewed the shopping cart.
User viewed the shopping cart.

00:02:38 /en/checkout/customerdetails.aspx
User clicked 'Next'.
(Customer Details) Use a different shipping address.: 1
(Customer Details) Name:: birthday girl
(Customer Details) Address:: birthday road 4
(Customer Details) Zip:: 4321
(Customer Details) Country:: Antarctica
(Customer Details) City:: guano city
(Customer Details) Address:: birthday road 41
(Customer Details) Form Submit
(Customer Details) Field Not Completed
(Customer Details) Field Not Completed
(Customer Details) State:: Mississippi
(Customer Details) Form Submit
(Customer Details) Field Not Completed
(Customer Details) City:: Springfield
(Customer Details) Form Submit

00:04:20 /en/checkout/payment.aspx
User selected the 'Checking Account' payment method.
User clicked 'Confirm' and confirmed the order.

00:05:41 /en/checkout/confirmation.aspx

Furthermore, if a visitor completes a form incorrectly, their errors also appear in the session trail.

In the next example, a site visitor has attempted to complete the *Create New Account* form. This time the visitor has not completed two required fields and has also not created a password for their new user

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account.

| | |
|---|---|
| 00:00:00 | / |
| 00:00:04 | /en/Company.aspx |
| 00:00:06 | /en/Company/CreateNewAccount.aspx<br>User registered an User Account [Goal]<br>(Create New Account) Name:: Henning<br>(Create New Account) Address:: Plangatan 23<br>(Create New Account) Country:: Denmark<br>(Create New Account) Email:: hen@<br>(Create New Account) Email:: hen@hotmail.com<br>(Create New Account) Form Submit<br>(Create New Account) Field Not Completed: You must enter a value in the Zip Code: field.<br>(Create New Account) Field Not Completed: You must enter a value in the City field.<br>(Create New Account) Field Not Completed: You must enter a value in the Username: field.<br>(Create New Account) Field Out of Boundary: The Confirm Password: must have at least 6 and no more than 256 characters.<br>(Create New Account) Field Not Completed: Confirm Password: must be filled in.<br>(Create New Account) Field Not Completed: You must enter a value in the Password: field.<br>(Create New Account) Field Out of Boundary: The field 'Password:' contains forbidden count of chars.<br>(Create New Account) Zip Code:: 2345<br>(Create New Account) City: Copenhagen<br>(Create New Account) Form Submit<br>(Create New Account) Field Not Completed: You must enter a value in the Username: field.<br>(Create New Account) Field Out of Boundary: The Confirm Password: must have at least 6 and no more than 256 characters.<br>(Create New Account) Field Not Completed: Confirm Password: must be filled in.<br>(Create New Account) Field Not Completed: You must enter a value in the Password: field.<br>(Create New Account) Field Out of Boundary: The field 'Password:' contains forbidden count of chars.<br>(Create New Account) Username:: Henning<br>(Create New Account) Password: : Password:<br>(Create New Account) Password: : Confirmation:<br>(Create New Account) Form Submit<br>(Create New Account) Invalid Field Syntax: The Password: and Confirm Password: fields must be the same.<br>(Create New Account) Password: : Password:<br>(Create New Account) Password: : Confirmation:<br>(Create New Account) News Letter:: 1<br>(Create New Account) Form Submit |
| 00:02:47 | /en/Products.aspx |
| 00:02:48 | / |

All the form validation error messages the visitor receives after attempting to submit the form also appear in the session report.

(Create New Account) Form Submit
(Create New Account) Field Not Completed: You must enter a value in the Zip Code: field.
(Create New Account) Field Not Completed: You must enter a value in the City field.
(Create New Account) Field Not Completed: You must enter a value in the Username: field.

**Note**
If you use SEFE with the OMS and Web Forms for Marketers, this report functionality is included without the need for any additional configuration.

If you use the OMS Marketing Center to create goals, campaigns, or visitor personalization on your e-commerce website, when a visitor triggers an OMS event it is automatically recorded in the Session report.

In the earlier example, the *Create New Account* form has a goal associated with it which is triggered when a visitor creates a new user account and submits the form. You can also see this event displayed in the Session report.

| | |
|---|---|
| 00:01:00 | /en/Company/CreateNewAccount.aspx<br>User registered an User Account [Goal] |

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## Analyzing Customer Behavior

If you combine the information provided in standard Sitecore OMS reports with web forms, you have a powerful tool to analyze the behavior of all the visitors and customers that come to your e-commerce website.

In a typical E-Commerce and OMS session report, you can see:

- Name of visitor organization.
- Country of origin.
- Duration of the visit.
- Products viewed on the webshop.
- Products purchased.
- Forms completed.
- Goals completed.
- Campaigns.
- Update the Shopping Cart
- Empty the Shopping Cart
- Change Delivery option.
- Complete the Delivery page.
- Complete the Payment page.

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The following session trail contains more detailed information about the shopping behavior of a customer during a single visitor session:

| | |
|---|---|
| 00:00:00 | /<br>User added 1 'D200' at 2150 to the shopping cart. |
| 00:00:06 | /layouts/ecommerce/Ajax.aspx/LoadSublayout |
| 00:00:08 | /en/Functions/ShoppingCart.aspx<br>User emptied the shopping cart and removed a total of 0 items. |
| 00:00:10 | /en.aspx<br>User added 1 'S200' at 129 to the shopping cart. |
| 00:00:16 | /layouts/ecommerce/Ajax.aspx/LoadSublayout |
| 00:00:17 | /en/Products.aspx |
| 00:00:19 | /<br>User added 1 '105mm f/2.8G AF-S VR Micro NIKKOR ' at 23 to the shopping cart. |
| 00:00:21 | /layouts/ecommerce/Ajax.aspx/LoadSublayout<br>User added 1 'Ever-ready Camera Case CF-D200' at 559 to the shopping cart. |
| 00:00:22 | /layouts/ecommerce/Ajax.aspx/LoadSublayout |
| 00:00:25 | /en/Functions/ShoppingCart.aspx<br>User updated the shopping cart.<br>User added 2 'Ever-ready Camera Case CF-D200' at 559 to the shopping cart.<br>User clicked 'Continue Shopping'. |
| 00:00:33 | /en.aspx |
| 00:00:36 | /en/Functions/CheckOutProcess/NameAndAddress.aspx<br>(Login) UserName: Oscar<br>(Login) Password:<br>(Login) Form Submit |
| 00:00:47 | /en/Functions/CheckOutProcess/NameAndAddress.aspx<br>User clicked 'Next'.<br>User selected delivery alternative: 'Post Denmark'.<br>User clicked 'Next'. The user selected delivery option: 'Post DK', and notification option: 'Email' 'red@ghshgs.com'.<br>User clicked 'Confirm' and confirmed the order.<br>User selected the 'Amazon' payment method.<br>User selected the 'Amazon' payment method.<br>User selected the 'Amazon' payment method.<br>User selected the 'Amazon' payment method.<br>(Name and Address) Form Submit |
| 00:01:03 | /en/Functions/CheckOutProcess/Payment.aspx |
| 00:01:07 | /en/Functions/CheckOutProcess/Payment.aspx |
| 00:02:35 | /en/Functions/CheckOutProcess/Confirmation.aspx |
| 00:03:26 | /en/Products.aspx |
| 00:03:27 | /<br>User logged out. |
| 00:03:30 | /en/Products.aspx |

This report gives a complete breakdown of a single customer's actions during one visit to the webshop.

During this session the visitor:

- Added a product to the shopping cart.
- Emptied the shopping cart.
- Added another product to the shopping cart.
- Changed the quantity of one product.
- Updated the shopping cart.
- Continued shopping.
- Began the checkout process.
- Logged in as a returning customer.
- Selected a delivery, notification, and payment option.

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- Clicked confirm and submitted the order.
- Logged out and then navigated to the *Products* page.

These events all appear as standard in the *Recent Activity* reports.

If you use all the information available in the *Latest Human Sessions* report, it can help you to:

- Optimize your product range.
- Adjust goals.
- Optimize campaigns.
- Improve the checkout process.
- Make your e-commerce website more successful.

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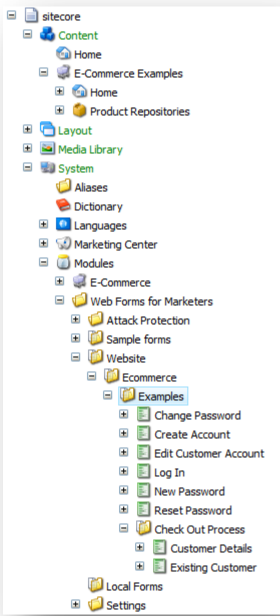
## 2.2 Web Forms Reports

Every web form has its own set of analytics reports in addition to the standard Sitecore Analytics reports.

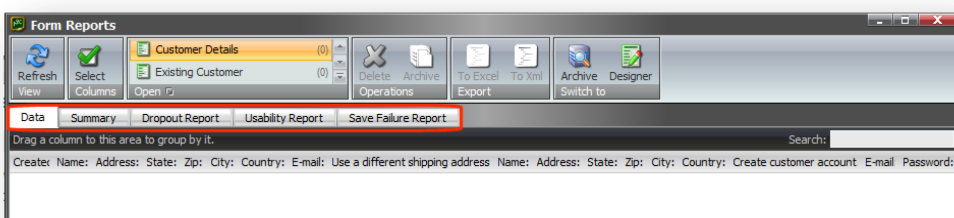
To view web forms reports:

1. In the **Content Editor**, content tree, navigate to:

   ```
   /sitecore/system/Modules/Web Forms for
   Marketers/Website/Ecommerce/Examples
   ```




2. Select a form, for example, *Customer Details* and the **Forms** tab appears in the ribbon.
3. In the **Forms** tab, **Form** group, click **Form Reports**.
4. The **Form Reports** window displays the following default reports for the current form.




| Report | Description |
|---|---|
| Data | Displays all the data entered on a form. The data is displayed in columns that can be filtered and sorted. |

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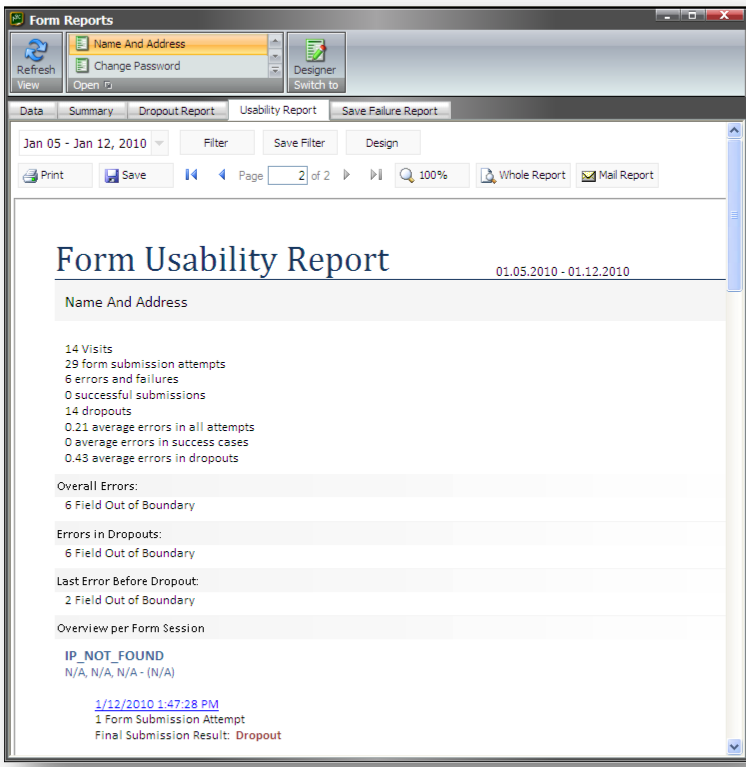
| Report | Description |
|---|---|
| Summary | The values entered in each field on a form.<br>The number of responses for each field.<br>The percentage of visitors who made each response. |
| Drop-out Report | Displays the values entered by visitors that failed to complete or submit a form. This report shows all the values entered by a visitor before they left a form. |
| Usability Report | Displays statistics for all form sessions and the form usage behavior for all the site visitors. |
| Save Failure Report | Displays statistics for every failed form submission. |

5. Select a tab, to view a report. For example, to find out more about the usability of your web forms, click **Usability Report**.




**Note**
You must have the appropriate access rights and permissions to view web form reports.

## 2.2.1 Form Reports

This section contains more detailed information about each of the standard web form reports and explains how they can help you to analyze the behavior of customers on your e-commerce website.

**Note**
The example reports in this section come from a different version of Sitecore E-Commerce.

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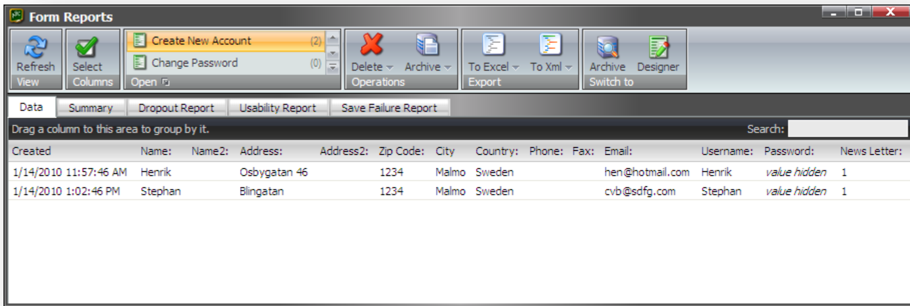
## Data Report

The *Data* report displays all the data that has been entered on the current form. This functionality only applies to forms that have been submitted successfully and have had the *Save to Database* save action assigned to them.

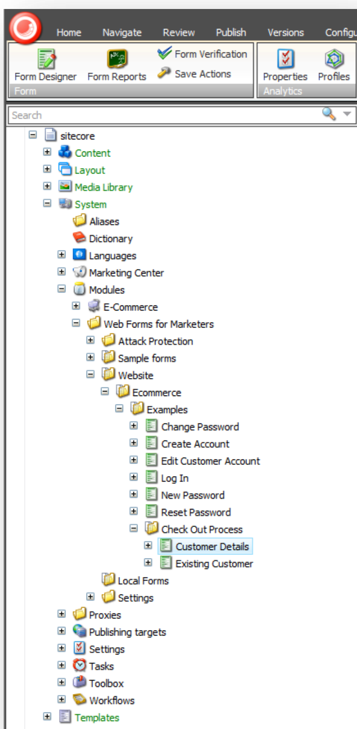


For example, this could be useful if you want to find all the contact details for registered customers. You can also sort or group information to make it easier to find specific details such as a customer's e-mail address.

The Form Reports ribbon also allows you to export form data as an Excel spreadsheet.

To add the *Save to Database* save action to a report:

1. In the **Content Editor**, navigate to the form.



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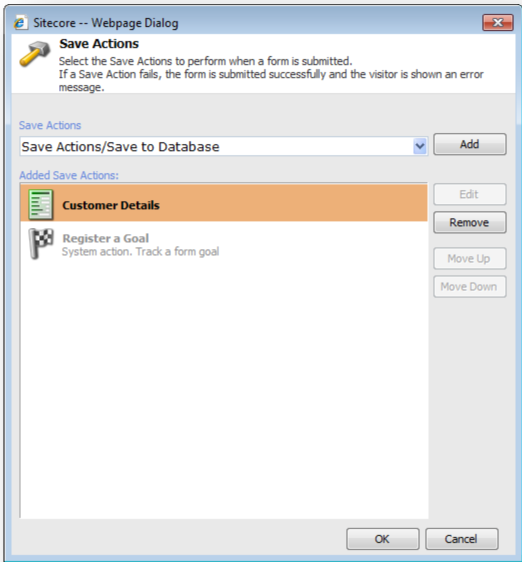
2. Select the form and then in the **Forms** tab, in the **Form** group click **Save Actions**.




3. In the **Save Actions** dialog box, in the **Save Actions** field, select the *Save to Database* and then click **Add**.

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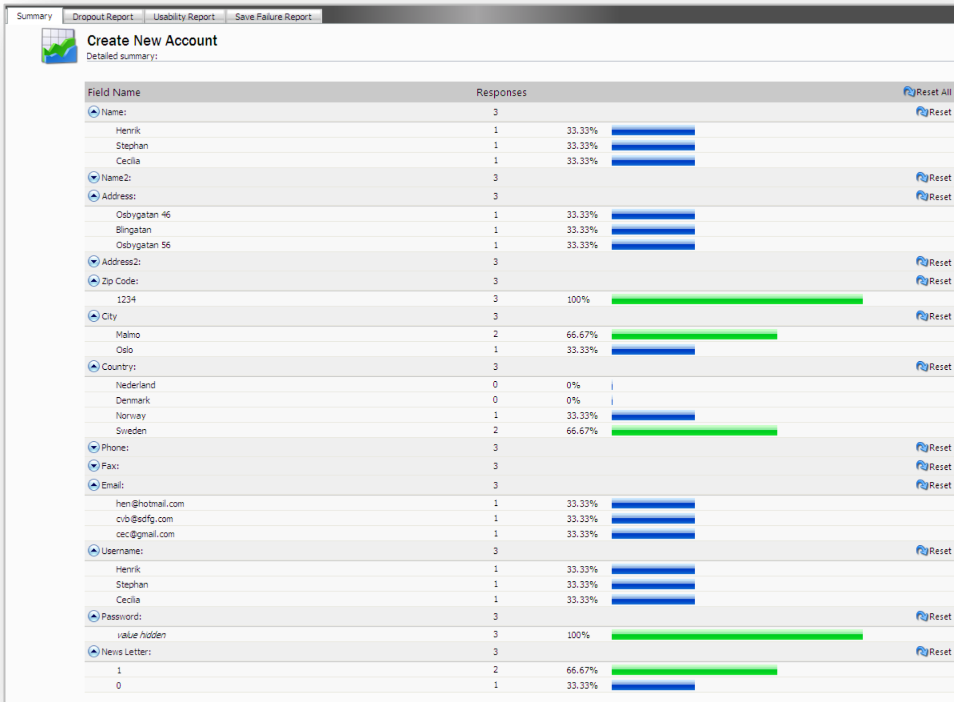
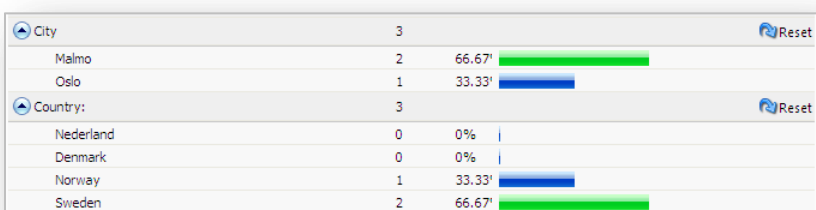
## Summary Report

The *Summary* report tab displays the values entered into each field on the current form. You can see all the values entered and the percentage of site visitors that made each response.

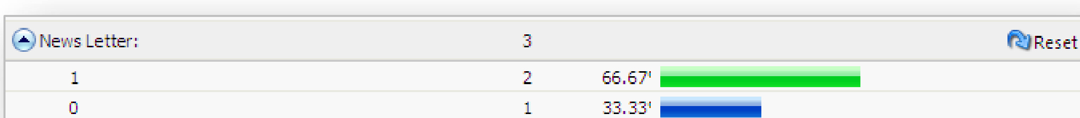



On an e-commerce website with multiple forms, this might help you to get an overview of the responses made by visitors who used this form.

In this example, the **City** and **Country** fields give you a breakdown of where your site visitors originated from. This could help when you start visitor segmentation.




The **Newsletter** field shows you the percentage of visitors that selected the *Subscribe to Newsletter* check box. This is useful to the marketing department when analyzing their e-mail campaign strategy.

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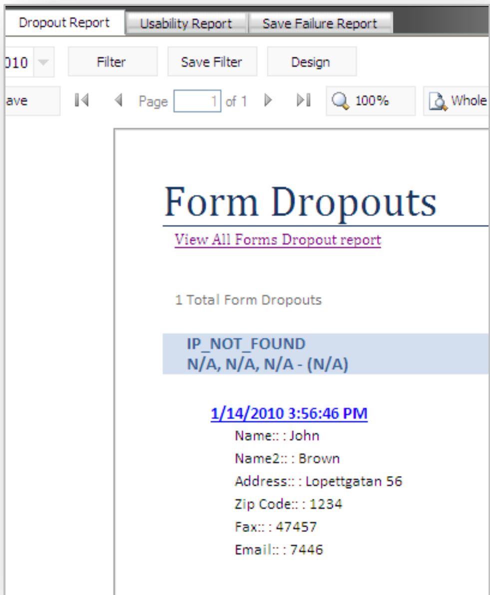
## Dropout Report

The *Dropout* report shows all sessions where a visitor navigated away from a form without submitting it. You can see all the information entered in each field before the visitor left the form. This can be very useful in helping you to find out why a visitor decided to leave a form. It may also provide sales people with useful customer contact information that might otherwise be lost.




The *Dropout* report shows dropouts for the current report. If you click the timestamp link you can view the details of the session report for this visit which shows all the pages visited and all the form fields completed by the visitor during this session.

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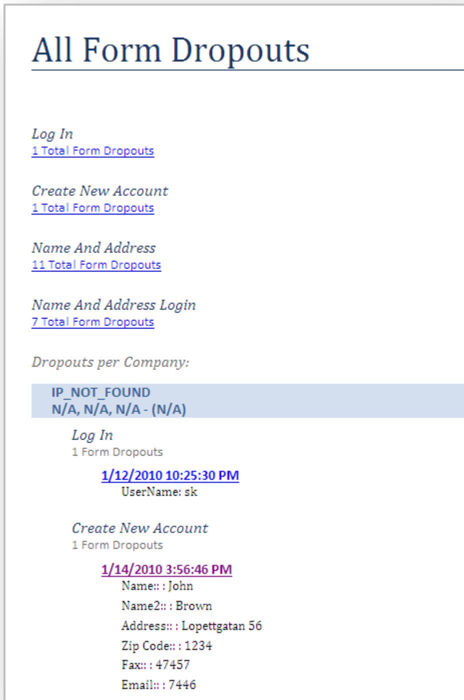
Click *View All Forms dropout report* to see the dropouts for all forms.




On an e-commerce website, having accurate form drop out data captured during the check out process could help you to find out why some customers decided not to purchase products on your webshop. This information could enable you to optimize your check out process, increase your conversion rate, and improve your ROI. Drop out reports are available on all the forms created with Web Forms for Marketers.

## Usability Report

The *Usability* report gives you an overview of all the data entered on the current form. In the following example, the *Create New Account* form has had 5 visits and 7 form submission attempts. You can also

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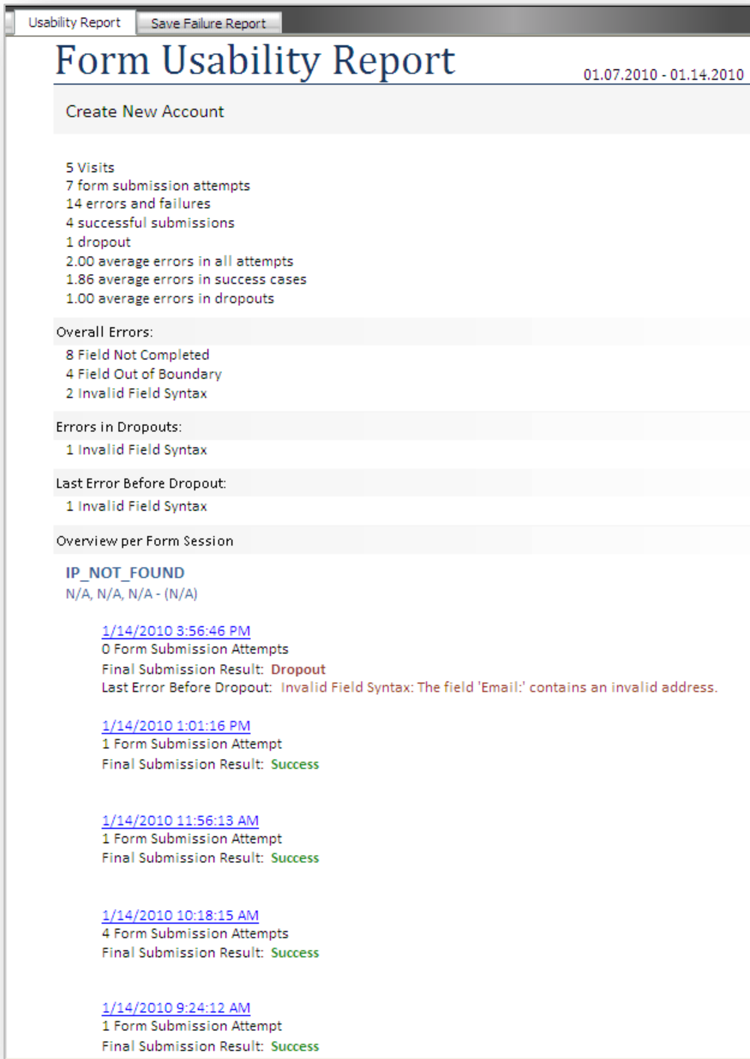
see all the errors and dropouts on this form as well as all the successful submissions.




On an e-commerce website this report could provide you with useful information about the behavior of your site visitors and customers. In the previous example, it might help you to improve the *Create New Account* form which might in turn lead to more visitors successfully registering as customers and therefore buying more products.

## Save Failure Report

The *Save Failure* report displays all the forms that contain save actions that have failed.

Save actions include:

- Send Mail
- Register a Goal
- Register as a Conversion

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If a form has a save action associated with it, the *Save Failure Report* records if and when this save action failed.

The *Save Failure* report for a *Name and Address* login form:


## 2.2.2 Enabling Sitecore Analytics

In Web Forms for Marketers, you have the option to enable several analytics options on each form. You can switch on Sitecore Analytics functionality, associate a goal with a form, or enable dropout tracking.

You need to enable the following reports in the form properties dialog box before you can view them in the Form Reports window:

- Dropout, Form report
- Usability report
- Save Failure report

For example, to enable *Form Dropout Tracking* with web forms:

1. Open the **Content Editor**.
2. Navigate to the *Web Forms for Marketers* node.

   `/sitecore/system/Modules/Web Forms for Marketers`

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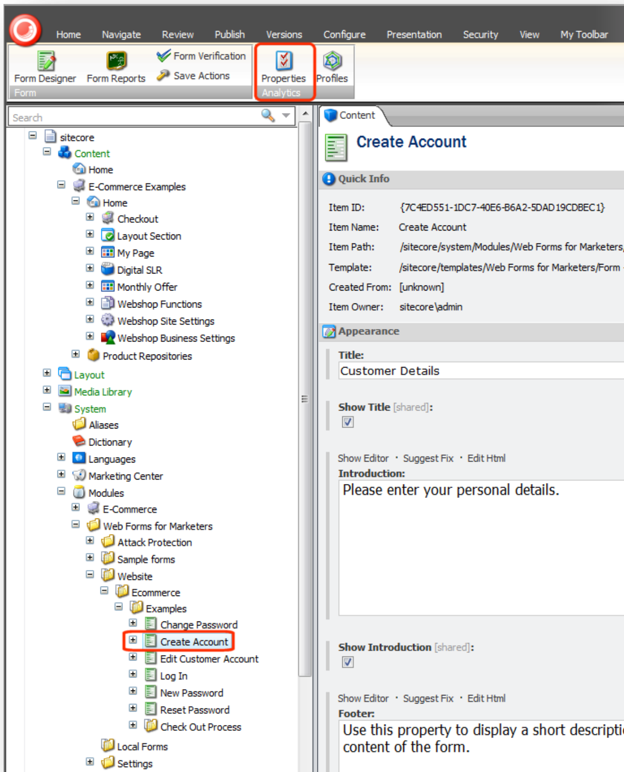
3. Select a web form, for example, *Create Account*.

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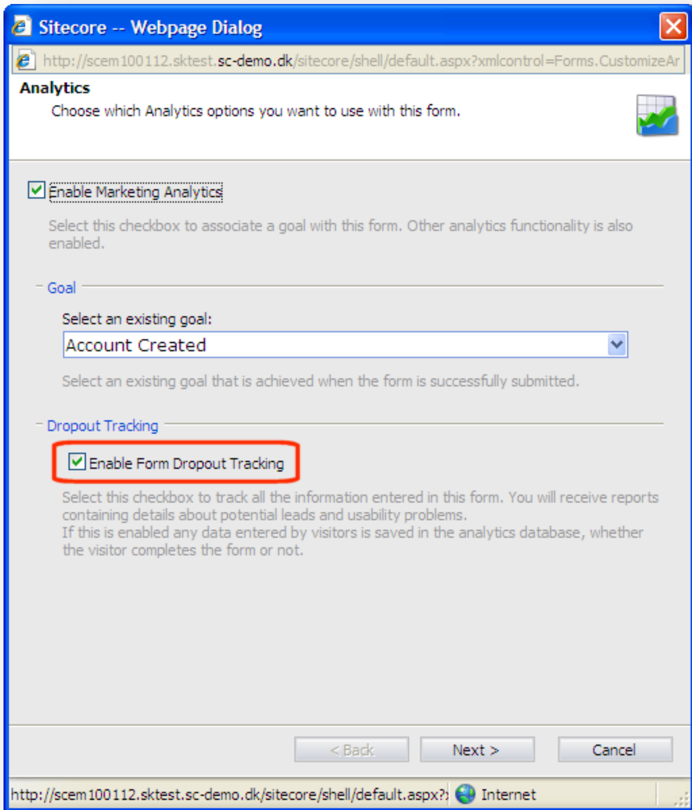
4. In the **Forms** tab, in the **Analytics** group, click **Properties** and the **Analytics** dialog box appears.




5. In the **Analytics** dialog box, select the option **Enable Form Dropout Tracking**, and then click **Next**.

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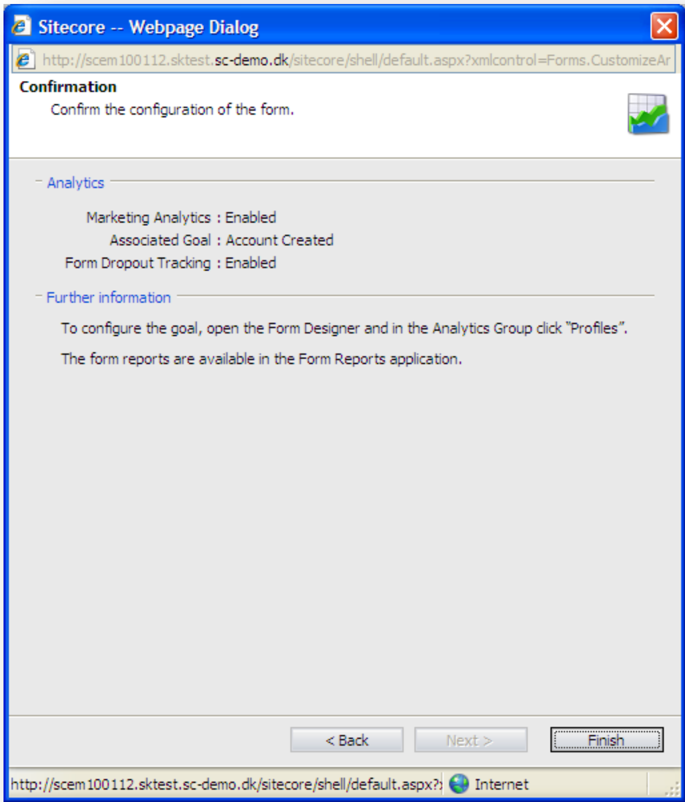
6. In the second page of the wizard you can see all the analytics options that you have enabled. Click **Finish** to save your changes and close the **Analytics** dialog box.




For more information on form reports, see the *Web Forms for Marketers* documentation.

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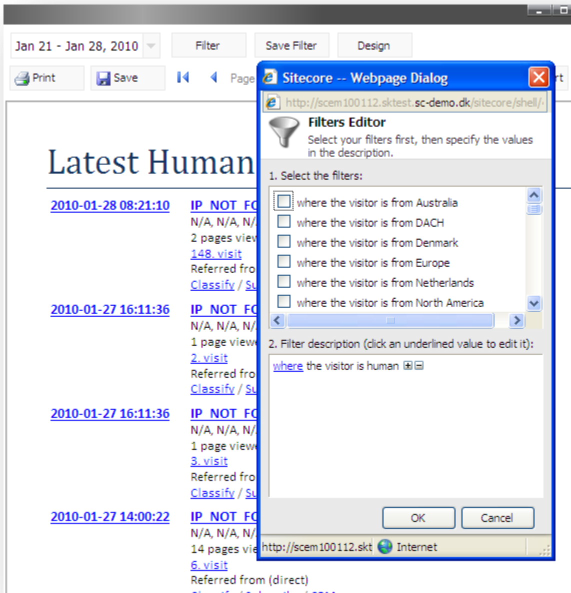
## 2.3 Filtering Reports

In Sitecore Analytics, you can apply filters to reports to change the data that appears in your report results. To open the **Filters Editor** window, click **Filter** at the top of any report, then select the filter you want to apply and click **OK**.




In Sitecore Analytics, you can also filter reports by date; you can save filters and can click **Design** to change a report definition file.

For more information on using filters, see the *Online Marketing Suite Cookbook* or *the Report Designer Cookbook*.

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# Chapter 3

# E-Commerce and the Online Marketing Suite

Combining Sitecore E-Commerce Fundamental Edition with the Sitecore Online Marketing Suite enables you to harness the power of a visitor experience database with web analytics on your e-commerce website. The Sitecore OMS integrates seamlessly with CMS 6 and Sitecore E-Commerce Fundamental Edition.

The OMS allows you to track site visits and customers, to accurately analyze their browsing behavior and purchase history and personalize content to match customer profiles. It also helps you gain a better understanding of your site visitors and customers enabling you to optimize your website to increase conversions and maximize ROI.

This chapter contains the following sections:

- Introduction to the OMS
- Profiling
- Goals
- Managing Campaigns
- Creating MV Tests
- Creating Personalization

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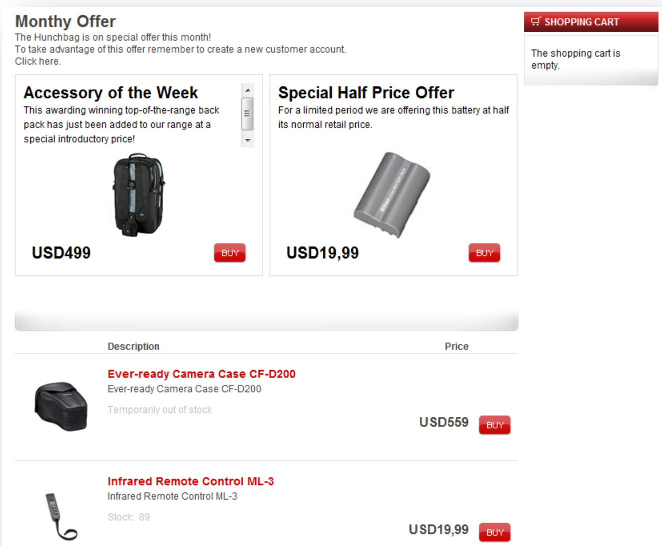
## 3.1 Introduction to the OMS

When you use SEFE in combination with the OMS, you can:

- Profile your site visitors.
- Record conversions and goals.
- Create and optimize campaigns.
- Configure MV tests.
- Create personalization.

To demonstrate some of these features we will use the monthly offer page that we made earlier. This page displays a selection of products at special discount prices. We will return to this example as we describe how to configure different features of the OMS combined with e-commerce functionality.




For more information on how to implement OMS functionality, see the *Online Marketing Suite Cookbook*.

### 3.1.1 Personas and the Web Shop

To utilize the full power of the OMS you should carefully plan the implementation of your profiling strategy. An important part of this is having a set of well thought through personas. Appropriate time and attention spent on this stage of your planning pays off later when your site is up and running.

You need to understand your customers and know your target groups. If necessary, start by carrying out more research to gather this information before creating your personas.

The SEFE sample webshop sells cameras and camera accessories to a wide range of potential customers from beginners to professional photographers. The personas that you create should reflect this. You could create profiles for these interest groups but your personas should overlap and reflect a broad range of visitor interests.

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## 3.2 Profiling

Once you have created profiles and profile keys you can assign values to the content on your website according to how closely it relates to the personas that you have created.

On an e-commerce website, profiling site visitors enables you to target content at specific customer groups based on their interests, browsing behavior, and purchase history. For example, targeted content could highlight specific products, special offers, or competitions.

Profiling is often one of the first tasks when configuring the OMS.

As part of profiling, you should:

- Create profiles.
- Create profile keys.
- Assign values to content items.

Use the Marketing Center to create profile definition items. Each profile can have several profile keys. When you create profiles you can decide how you want to calculate profile scores, for example by percentage or sum. When you create profile keys you can decide which type of control to use to set profile values. For example, you can choose sliders, smileys, or stars.

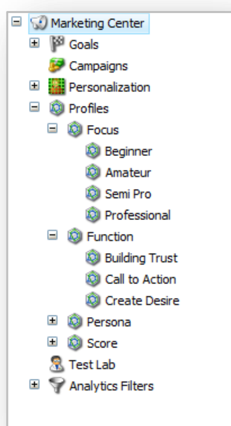
In the Content Editor, use the Analytics window to assign values to individual content items. You can use the Page Editor or the Content Editor to set profile values.

### 3.2.1 Planning a Product Profile Strategy

In this section, we create a profile strategy based on the skill level of potential customers. In the real world you would include personas and might also want to extend these profiles to include more categories such as, shooting interests, shooting conditions, and customer yearly budget. However, to explain the basic concept of e-commerce profiling, we will start with this relatively simple profile strategy.

In the Marketing Center, create the following profiles and profile keys:

| Profile Name | Profile Key |
|---|---|
| Focus | Beginner<br>Amateur<br>Semi Pro<br>Professional |
| Function | Create desire<br>Build trust<br>Call to action |




For more information about creating profiles and profile keys, see the *Online Marketing Suite Cookbook*.

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### 3.2.2 Assigning Profile Values to Items

On an e-commerce website you can add profile key values to:

- Content Items
- Product Categories
- Products

You cannot assign OMS profile values to forms, only to the pages forms appear on.

The following examples illustrate some possible approaches to profiling using the profiles and profile keys that we created earlier. Assigning profile keys is always a subjective process and is different for every website. The first time you set these values you may find it time consuming and repetitive. If you wish, you can re-visit these values later and fine-tune them. However, once you start to see how profile data is used in the OMS to segment site visitors and to create real-time personalization, you will start to understand the benefits of creating an effective profile strategy.

#### Customer Details Page

The *Customer Details* page is the first page in the checkout process and contains the *Create Account* form. This is an important page because it is here that the visitor becomes a customer and it is therefore important that we add some profile key values to this page.

This page contains some forms that the user must fill in if they want to place an order. You should therefore give the *Call to Action* function a high profile key value to reflect this.

To assign profile values to a page:

1. In the **Content Editor**, navigate to the *Customer Details* page.
2. In the **Analyze** tab, in the **Attributes** group, click **Profiles**.
3. In the **Profiles** dialog box, select the **Function** check box.

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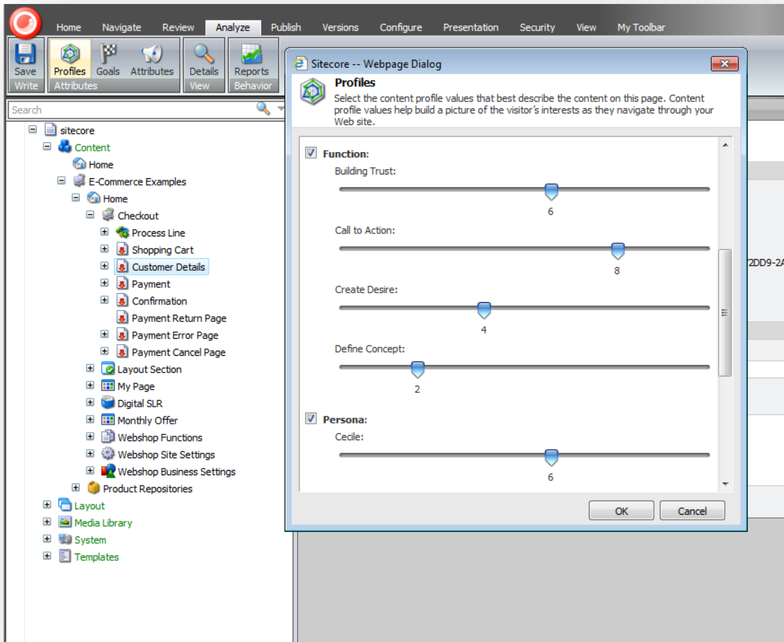
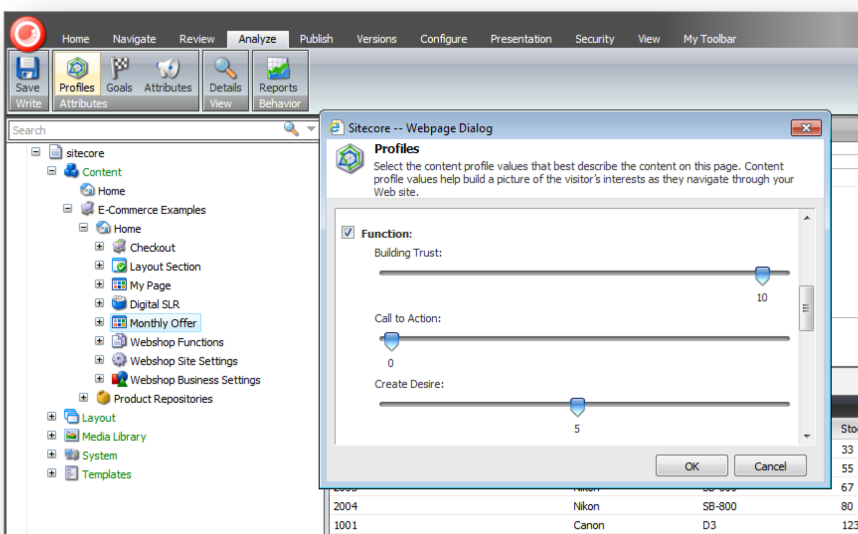
4. Move the **Call to Action** slider and assign an appropriate vale to this function.




## Monthly Offer Product Category

Select the *Monthly Offer* product category item. Add some profile key values to this item.

You are hoping that visitors to this section will buy products, so *Create Desire* and *Call to Action* should have high profile key values. *Monthly Offer* is also an online campaign and to reflect this you should consider giving the *Create Desire* function a few additional points on the scale.

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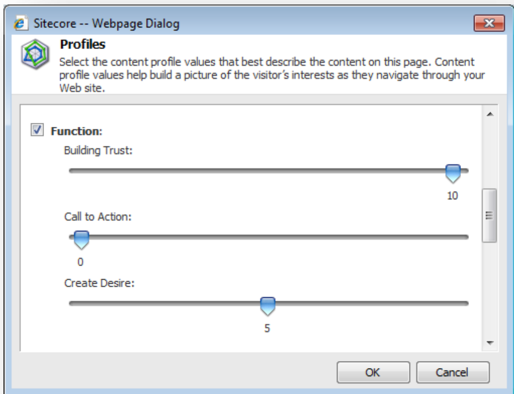
By adding profile values to products, you can find out more about the interests and preferences of your site visitors making it easier to segment visitors and to know which products to keep in stock. Profiling also makes it possible to create visitor personalization.

## About Us Web Page

Most websites have an *About Us* page that contains information about the company and is designed to reassure new customers by creating a feeling of trust. The profile values that you assign to this page should reflect this. You should therefore select the *Function* profile and assign a high value to the *Building Trust* profile key.




You should assign profile values to every page on your website. The values you assign should reflect position, function, and importance of each page on your website.

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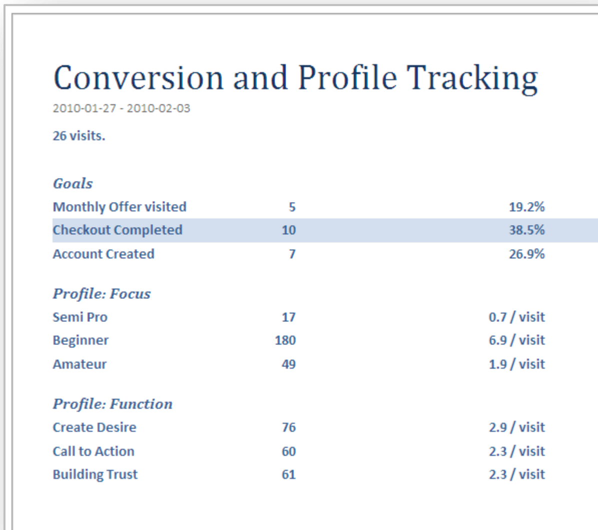
## 3.3 Goals

Goals help you to measure the effectiveness of your campaigns and the overall success of your website. You can assign a goal to any event, such as signing up for a newsletter, adding a product to the shopping cart, or confirming an order.

On an e-commerce website this information can help you to track which events lead to the most visitor conversions. This can help you to optimize your website, increase customer purchases, and improve ROI.

In Sitecore Analytics, you can view *Conversion and Profile Tracking* reports that give you a breakdown of all the goals achieved on your website.



Conversion and Profile Tracking

2010-01-27 - 2010-02-03

26 visits.

| | | |
|---|---|---|
| *Goals* | | |
| Monthly Offer visited | 5 | 19.2% |
| Checkout Completed | 10 | 38.5% |
| Account Created | 7 | 26.9% |
| *Profile: Focus* | | |
| Semi Pro | 17 | 0.7 / visit |
| Beginner | 180 | 6.9 / visit |
| Amateur | 49 | 1.9 / visit |
| *Profile: Function* | | |
| Create Desire | 76 | 2.9 / visit |
| Call to Action | 60 | 2.3 / visit |
| Building Trust | 61 | 2.3 / visit |

Campaign reports display goals achieved during a campaign and the percentage of visitors achieving these goals.

Campaign Details

Google Add Words

Monthly Offer Online Campaign

9 visits

| | | |
|---|---|---|
| *Goals:* | | |
| Hunchbag product details viewed | 2 | 22.2% |
| Photo-Choice campaign page visited | 1 | 11.1% |
| Account Created | 20 | 222.2% |
| D200 viewed | 1 | 11.1% |

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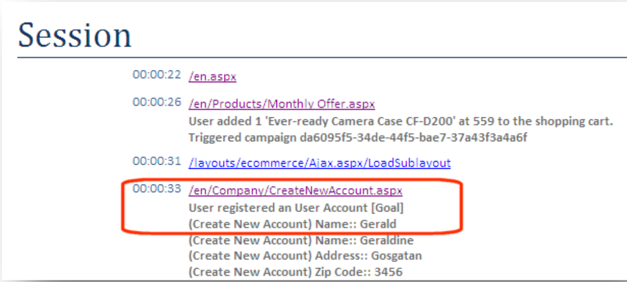
Goals also appear in the session trail alongside other events recorded in the *Latest Human Sessions* report.




You create goals in the Marketing Center and then assign them to content items.

### 3.3.1 Creating and Assigning Goals

On an e-commerce website, you can assign goals to:

- Content Items
- Product categories
- Products
- Web forms

To illustrate how to assign goals we will use the, *Monthly Offer* section.

For example, in the Marketing Center, you could create a goal called *Monthly Offer Visited*. To make this goal appear in your Sitecore reports, you must remember to select the *IsGoal* check-box.

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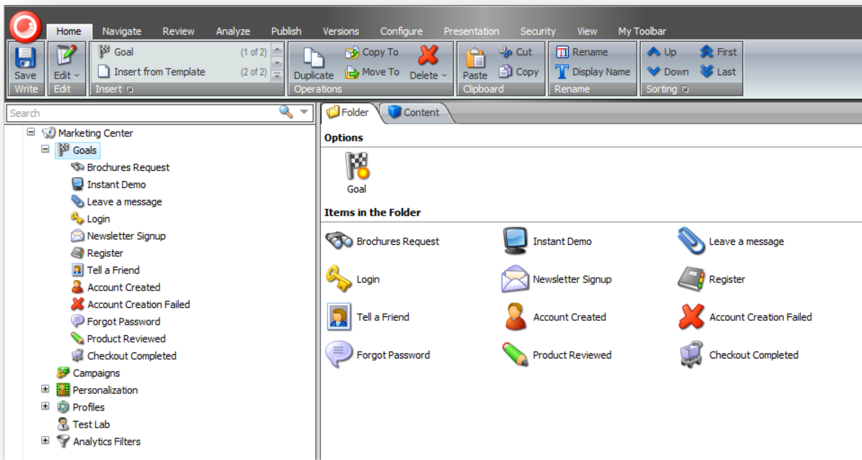
## Creating a Goal

The *Monthly Offer Visited* goal has not been created yet.

To create the *Monthly Offer Visited* goal:

1. In the Sitecore desktop, click **Sitecore**, **Marketing Center**.




2. In the **Marketing Center** content tree, click Goals.
3. In the **Home** tab, **Insert** group, click Goal.
4. In the dialog box that appears, call the new goal *Monthly Offer Visited.*
5. Ensure that the **IsGoal** check box is selected.

## Assigning a Goal to a Content Item

The *Monthly Offer* page contains products that you want to promote. To trigger the *Monthly Offer Visited* goal on this item, you must first assign this goal to the *Monthly Offer* item.

This means that each visitor viewing the *Monthly Offer* page will achieve a conversion, taking them one step closer to buying a product.

*Monthly Offer* is also an online campaign, so visiting this page will trigger a campaign event. Capturing this information helps you to measure the success of your campaigns and the overall success of your website.

To assign the *Monthly Offer Visited* goal to the *Monthly Offer* page:

1. In the **Content Editor**, select the *Monthly Offer* product category.

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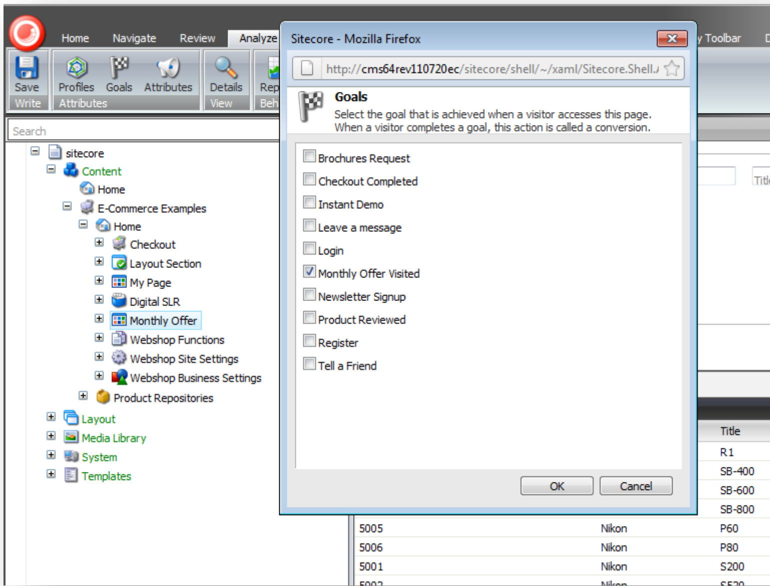
2. In the **Analyze** tab, **Attributes** group, click **Goals**.



3. In the **Goals** dialog box, select the *Monthly Offer Visited* goal and click **OK**.
4. In the ribbon, click **Save**.

## Assigning a Goal to a Web Form

To associate an existing goal with a form on the webshop:

1. In the **Content Editor**, content tree navigate to the *Web Forms for Marketers* node: `/sitecore/system/Modules/Web Forms for Marketers/Website/Ecommerce/Examples`
2. Select the *Create Account* form. The **Forms** tab appears in the ribbon.

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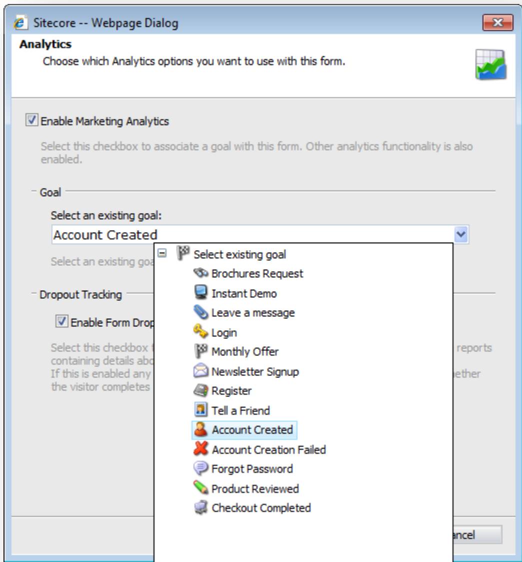
3. In the **Forms** tab, **Analytics** group, click **Properties**.




4. In the **Analytics** dialog box, in the **Goal** section, click the drop-down list and select an existing goal, for example, *Account Created*.
5. Click **Next** in the **Analytics** wizard to review your changes and then click **Finish**.

For more information about creating and assigning goals, see the *Online Marketing Suite Cookbook*.

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## 3.4 Managing Campaigns

You create campaigns to encourage visitors to come to your website and perform desired actions. On an e-commerce website, this means you want visitors to become customers and buy products.

In the Sitecore OMS it is quick and easy to create campaigns and use standard OMS reports to measure their effectiveness. You can fine tune and improve your campaigns over time.

There are two main types of campaigns:

- Online campaigns — for example, a Google AdWords campaign that links to a specific page or section on a website.
- Offline campaigns — for example, a magazine promotion with an offline landing page that can only be reached using an alias.

If you create an online or offline campaign in the OMS Marketing Center, when the campaign is triggered the campaign appears in the Sitecore Analytics Session report.

Sitecore Analytics also contains standard campaign reports that display more detailed analytics data related to your campaigns.

You can also create e-mail campaigns using the Sitecore E-mail Campaign Manager. For more information about creating e-mail campaigns, see the *ECM Marketer's Guide*.

### 3.4.1 Online E-Commerce Campaigns

To illustrate how to create and evaluate an e-commerce campaign, we will again use the, *Monthly Offer* section. This section contains products that are on offer at special discount prices.

To promote your campaigns, you can use tools such as Google AdWords to ensure that potential customers reach your site from a Google search page. We will assume that most visitors first use Google to find the photographic equipment they want to buy and then click the link that appears in their search results.

To configure and test an online campaign, you need to complete the following checklist of tasks:

- Create a campaign item.
- Create a campaign event.
- Copy the campaign event URL to your Google AdWords administration page.
- Visit the campaign page on your webshop.
- View the Sitecore Analytics Session report.
- View the Sitecore Analytics Campaign reports.

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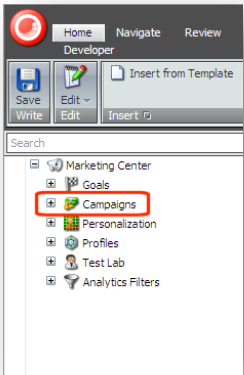
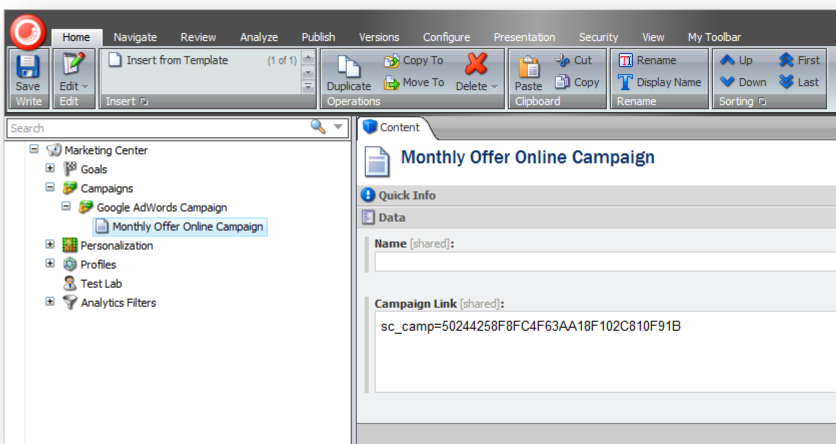
## How to Create an Online Campaign Item

1. Click the Sitecore start menu and then click **Marketing Center**.
2. In the **Marketing Center**, select the **Campaigns** node.




3. In the **Insert** group, click **Campaign**.
4. Name your campaign item *Google AdWords Campaign*.
5. Select the *Google AdWords Campaign* item and in the **Insert** group, click **Campaign Event** to create a new event.
6. Name the campaign event *Monthly Offer Online Campaign*.




7. In the **Campaign Link** field, copy the campaign URL and paste it into your Google ad.
8. In the ribbon, click **Save**.

After you have configured your online campaign, visitors coming to the *Monthly Offer* page from a Google search will trigger this campaign in Sitecore Analytics. You can then view standard OMS reports to analyze this campaign in more detail.

For more information on how to configure Google Ads, see the *Online Marketing Suite Cookbook*.

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**Note**
You can use search forms to find the products you want to associate with your campaigns or you can copy each product manually so they appear under the appropriate product category.

## 3.4.2 Offline E-Commerce Campaigns

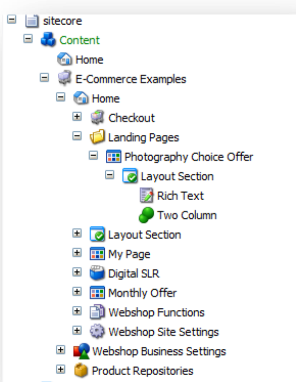
This section explains how to create an offline campaign for SEFE example pages. The campaign offers readers of Photography Choice (a fictitious photography magazine) an exclusive discount on selected high-end photography products. A special alias has been published in the latest edition of the magazine that gives readers exclusive access to an offline landing page. The aim of this campaign is to attract more professional and semi-professional photographers to the site and encourage them to buy products.

To create an offline campaign, you need to complete the following tasks:

- Create a stand-alone campaign landing page.
- Create an alias for the page.
- Create a campaign item.
- Associate the landing page with the campaign attribute.
- Test the landing page.
- View the session report.
- View the campaign report.

### Creating a Landing Page for an Offline Campaign

1. In the **Content Editor** content tree, create a folder called *Landing Pages* to keep your landing page and any other related items.
2. Create a new item based on the *Product Search Group* template. Name the item *Photography Choice Offer*.




3. Add a **Layout** section and add the following layouts:
   - Rich Text
   - Two Column
4. Add the following text to the **Text** field of the **Rich Text** layout:

   *Exclusive offer to readers of Photography Choice Magazine.*

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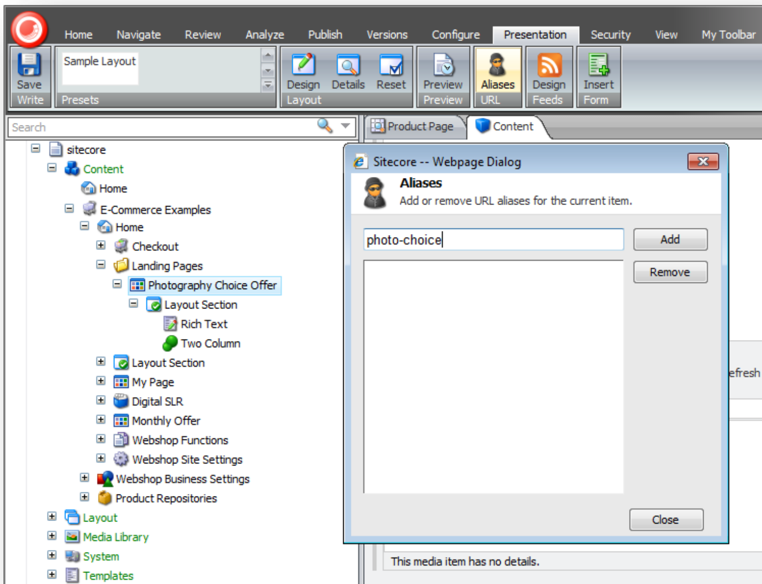
*If you register now, get a 30% discount on either of the products below.*

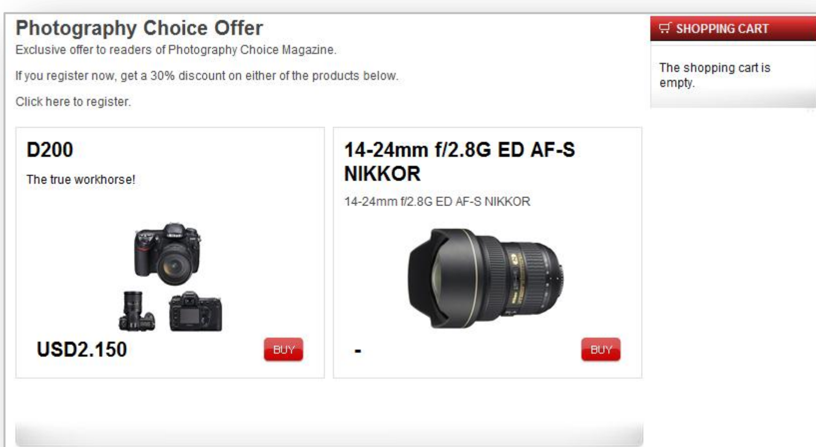
*Click here to register*.

5. In the **Two Column** layout item, select the following products:
   - D200
   - 14mm f/2.8D ED AF NIKKOR
6. You must create an alias for your item. Select the *Photography Choice Offer* item and then click the **Presentation** tab and click **Aliases**.




7. In the **Aliases** dialog box, add a new alias called *photo-choice*.
8. In the ribbon, click **Save**.

The offline campaign landing page should look something like this:

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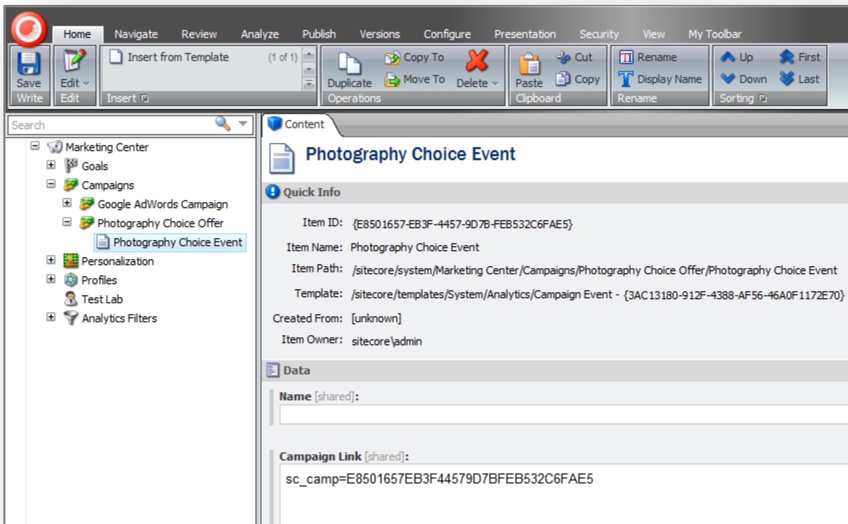
## Creating an Offline Campaign Item

1. Click the Sitecore start menu and then click **Marketing Center**.
2. In the **Marketing Center**, select the **Campaigns** node.
3. In the **Insert** group, click **Campaign**.
4. Name your campaign item *Photography Choice Offer*. Enter appropriate information in all the relevant fields.
5. Create a campaign event item called *Photography Choice Event*.




## 3.4.3 Campaign Reports

Sitecore Analytics has several standard reports that provide you with valuable statistics that you can use to evaluate the success of your campaign.

### The Session Report

In Sitecore Analytics, click *Recent Activity*, *Latest Human Sessions* to view the most recent visitor sessions on your webshop. If any visitors have come from a campaign, this is recorded in the Sitecore Analytics reports. For example, visitors coming from a Google Ad to the *Monthly Offer* page will trigger this campaign in the session report.

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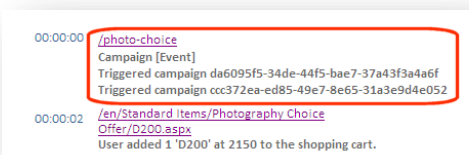
The following session report shows the campaign event triggered on the *Monthly Offer* page.


A campaign event is also triggered when a visitor uses the *Photography Choice* alias to visit this offline campaign.




## Campaign Details and Summary Reports

The *Campaign Details* report and the *Campaign Summary* report display:

- The total number of visits to the campaign.
- Goal conversion rates for the campaign including:
  - The number of conversions.
  - The percentage of visitors achieving conversions.
- Profile scores related to each campaign.

By combining SEFE and the OMS you can manage a variety of e-commerce campaigns simultaneously.

You can use goals to measure the success of your campaigns.

The Sitecore Analytics standard reports give you an overview of all your campaigns without the need for any special configuration. You can use these reports to adjust and fine tune your campaigns to improve their effectiveness over time.

It is also easy to use the Content Editor to create landing pages and as you will see in the next chapter, you can also create MV tests to experiment with different controls or layouts that could help you to optimize your campaign landing pages.

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## 3.5 Creating MV Tests

Multivariate testing is a powerful way of finding the most effective web controls to use on campaign landing pages or other pages on your website. For example, a web control could be a campaign slogan and banner, a button to purchase an item or a simple web form. MV Tests can help you to decide which combinations of images and text work best.

In the OMS it is quick and easy to create an MV test and to integrate it with your Sitecore E-Commerce installation. Sitecore Analytics also includes a standard MV Test report which displays the percentage of visitors that use each control and the number of conversions that result from each test.

### 3.5.1 MV Tests and E-Commerce

On an e-commerce website optimizing your web controls can make your campaigns more effective and result in increased sales and ROI.

#### How to Create an MV Test

To illustrate this on the webshop, we will create two very different marketing slogans to encourage visitors to buy the products featured in the *Monthly Offer* campaign.

Use the following slogans or create some of your own:

| Slogan 1 | Slogan 2 |
|---|---|
| *Please buy the products on this page!* | *Two unique products on special offer this month!!*<br>*Get a 30% discount if you buy now!!* |

Checklist of tasks:

- Create content items containing two different slogans.
- Create a test and some test variables.
- Choose a test strategy.
- Select a rendering.
- Enable the MV test.

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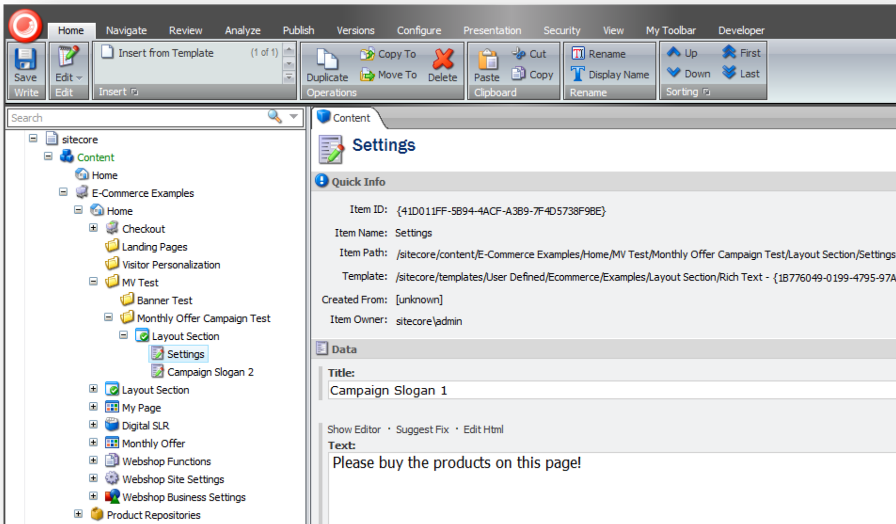
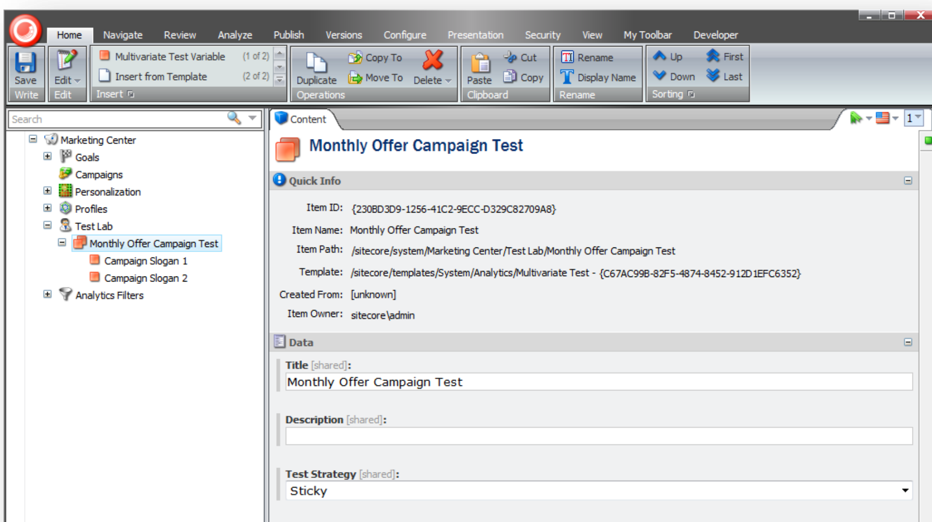
To create an MV Test:

1. In the **Content Editor**, content tree create two test content items. Name one of these items *Settings*.




2. Add some text to the **Text** field for your slogans.
3. In the **Marketing Center**, click **Test Lab** and create a multivariate test and two test variables.




4. In the **Test Strategy** field, select the *Sticky* test strategy.

   *Sticky* means that you keep the same test variable for one session. When you create a new session you see the second test variable.

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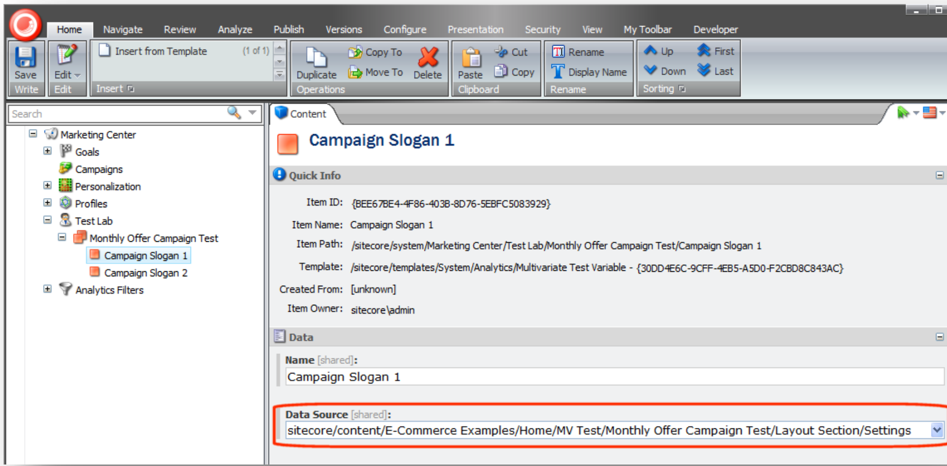
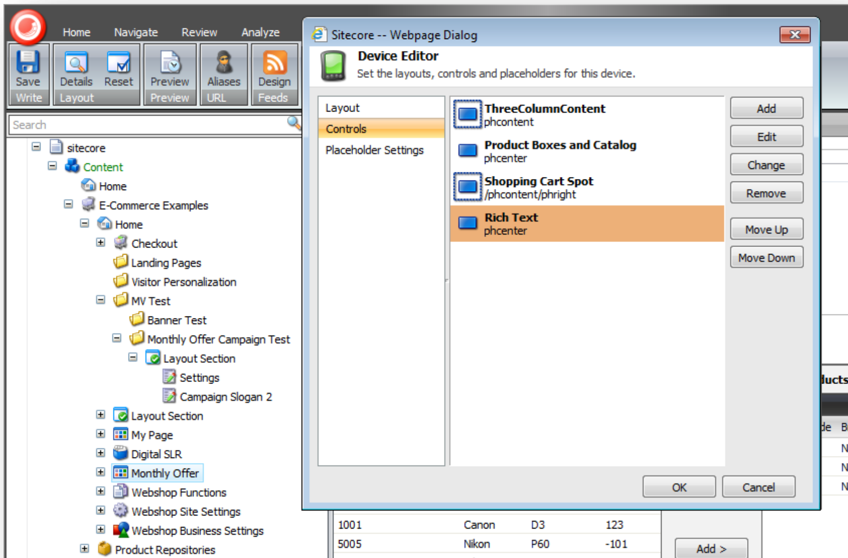
5. Select each test variable and point to a data source.




6. In the content tree, select the *Monthly Offer* item.
7. Click the **Presentation** tab and in the **Layout** group, click **Details**.
8. In the **Device Editor** dialog box, select the **Rich Text** rendering.




9. Preview the *Monthly Offer* page in design mode in the **Page Editor**. Add this control to the *Monthly Offer* page and select *phcenter* as the placeholder.

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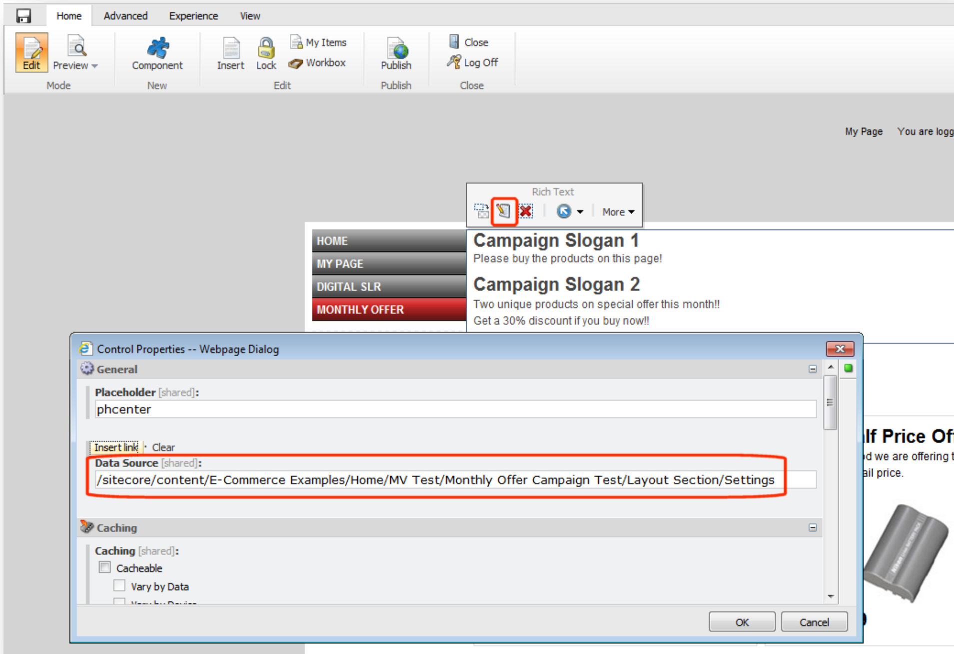
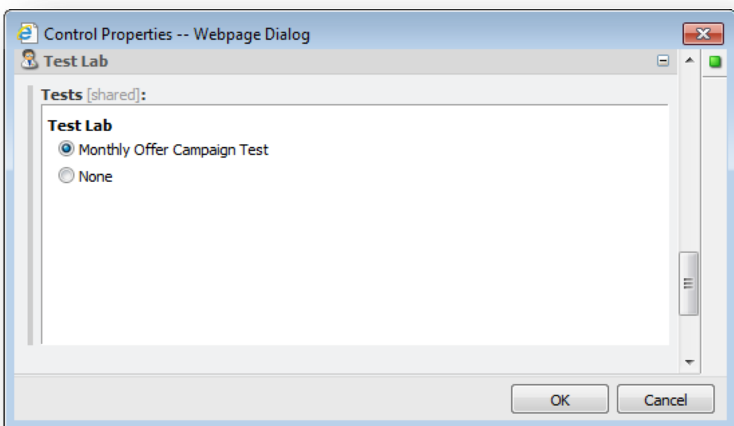
10. In the **Control Properties** dialog box, **Data Source** field, point to the *Settings* item.



11. Scroll down to the **Test Lab** section and select the *Monthly Offer Campaign Test* to activate this MV Test.




12. Test the MV Test and view the **MV Tests** report in Sitecore Analytics.

## MV Test Reports

In a simple test, you could use one slogan for one week, switch to another slogan for the second week, and then compare results. Sitecore allows you to use a more dynamic approach. Select a *sticky* test strategy to display slogan 1 to some visitors and slogan 2 to others. Then compare conversion rates between the two sets of visitors. When one slogan shows better results, discard the other one.

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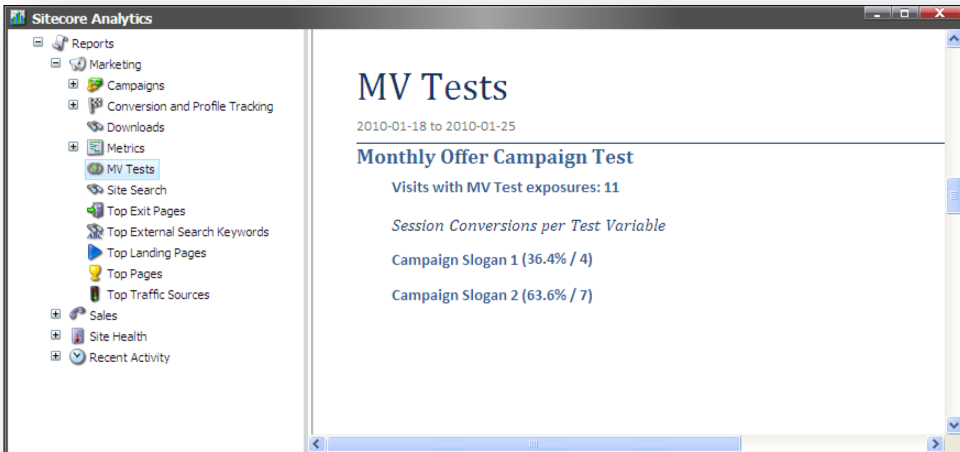
On an e-commerce website, if you have configured your goals correctly to measure how many customers are buying your products, then this can be a very effective way of optimizing a campaign.

The MV Test report in Sitecore Analytics displays:

- The percentage of session visits per test variable.
- The number of session visits per test variable.
- The percentage of session conversions per test variable.
- The number of session conversions per test variable.

This report works out of the box without the need for any additional configuration.

In Sitecore Analytics, open the MV Tests report to see the results of the *Monthly Offer Campaign* MV test we created.




The report shows that the second slogan generated more responses and was therefore the most effective at bringing customers to this campaign.

For more detailed instructions on how to create an MV Test, see the *Online Marketing Suite Cookbook*.

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## 3.6 Creating Personalization

Personalization is one of the ultimate aims of any e-commerce website. In Sitecore OMS, you can create rules to target specific web content at different groups of site visitors.

In the Marketing Centre, you can create personalization rules so that you only display certain content to particular groups or segments of visitors. For example, you might want to push high-end products to professional photographers and push a different set of products to beginners.

To do this you could create a rule that only displays content to visitors that achieve a profile score higher than a specific value. This value can be set in your conditional rendering rules.

If you have a set of profile keys on your site for different skill levels, then you can create personalization rules based on profile key scores. For example, when a site visitor accumulates a score that matches the profile of a professional photographer, they see appropriate products.

This is just one example and there are many other, more advanced types of personalization rules that you can create.

Before you can implement personalization on your site, you need the following pre-requisites:

- A set of profiles and profile keys.
- Content items to use as the data source for the conditional renderings.
- A web control or rendering item.

### 3.6.1 Personalization and E-Commerce

On an e-commerce website personalization can help to increase conversions, ROI, and also to ensure that valuable sales opportunities are not lost.

#### Personalizing Content

The example pages that come with Sitecore E-Commerce Fundamental Edition are too limited to base a personalization exercise around. The exercise in this section explains how to implement personalization using another sample website that sells photographic equipment. You are therefore unable to replicate the steps.

To illustrate how to personalize content in the webshop, we assume that the webshop contains a books section. We will use the *Recommended Books* section and in particular the *Nature Photography* page.

The object of the exercise is to display ads for different cameras and accessories on the *Nature Photography* page to visitors with different levels of photographic skill.

Checklist of tasks:

- Create content items to use as a data source.
- Create personalization rules.
- Choose a content item to personalize.
- Choose a control or rendering.
- Enable your personalization rules.
- Test your personalization rules in a web browser.

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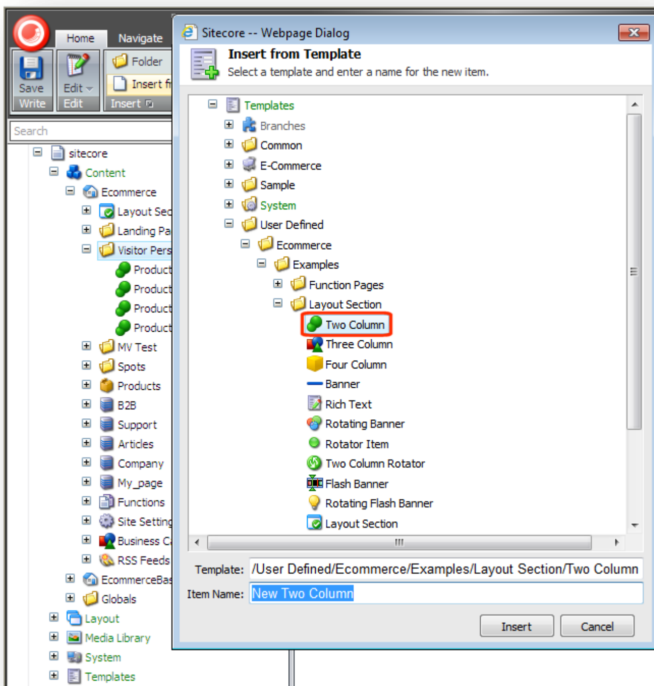
You must create some rules that determine which content the visitor will see. These rules are based on the profile scores that the visitor achieves when they visit the site. These scores reflect the visitors level of photographic skill:

| Profile Score | Skill Level | Product Displayed |
|---|---|---|
| 0 - 10 | Beginner | COOLPIX P60 |
| 10 - 20 | Amateur | COOLPIX S700 |
| 20 - 30 | Semi Pro | D60 |
| 30 - 40 | Professional | D300 |

To implement this personalization example:

1. In the **Content Editor**, create a folder called *Visitor Personalization* and create four sub-items; one for each product that you want to display. Use the *Two Column Layout* template.




2. In each **Two Column** Layout, select appropriate products and accessories for each skill level.

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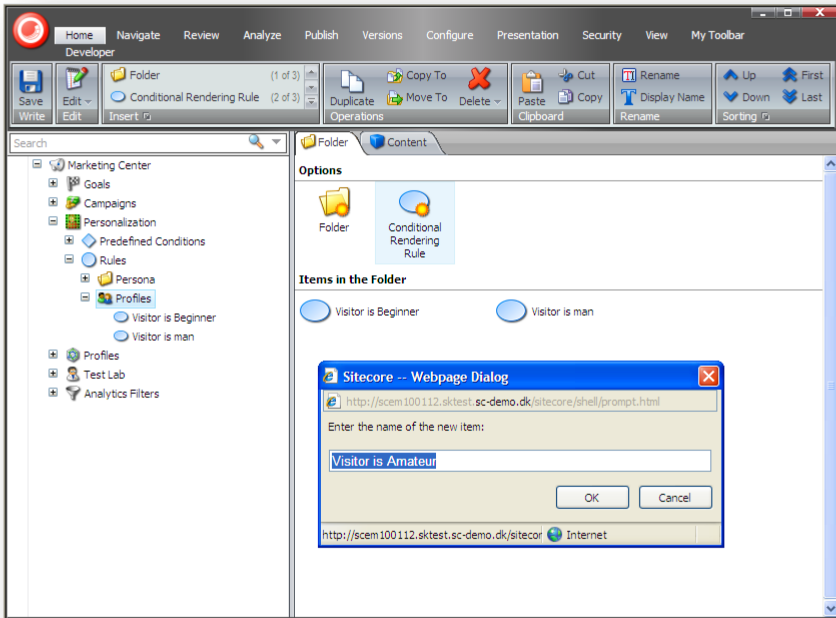
3. In the **Marketing Center**, select **Personalization** and create a new conditional rendering rule for each skill level.




For each rule, use the **Rule Editor** dialog box to create some suitable conditions.

For example, the rule for *Amateur* could consist of the following values:

**Conditions** — *Where the value of specific profile key compares to specific value.*

**Actions** — *Set data source to item.*

**Rule Description**

| | |
|---|---|
| Value (profile key value) | Amateur |
| Select Comparison | Is greater than or equal to |
| Value | 40 |
| Set data source to | Product 2 |

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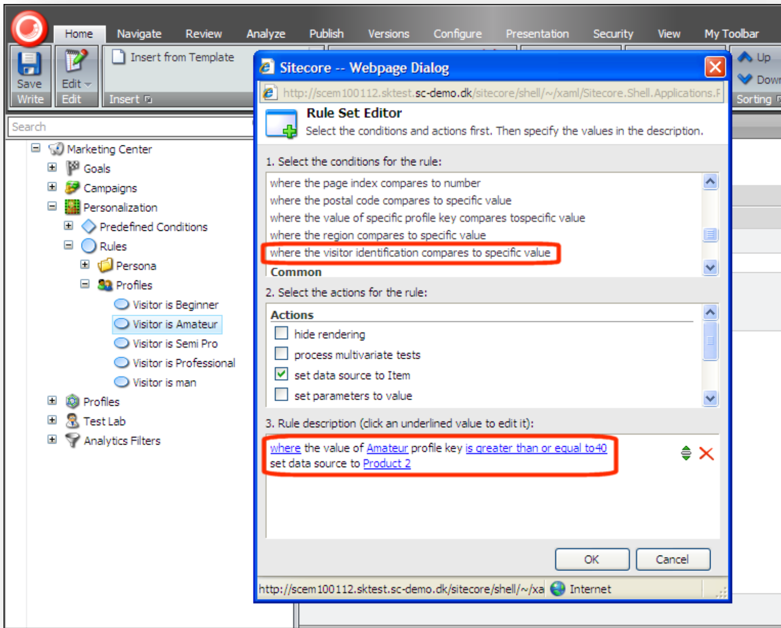
The **Rule Set Editor** window:




4. Click **OK** to save your rule.
5. Select the content item that you want to personalize. Select the *Nature Photography* page under the *Recommended Books* section.

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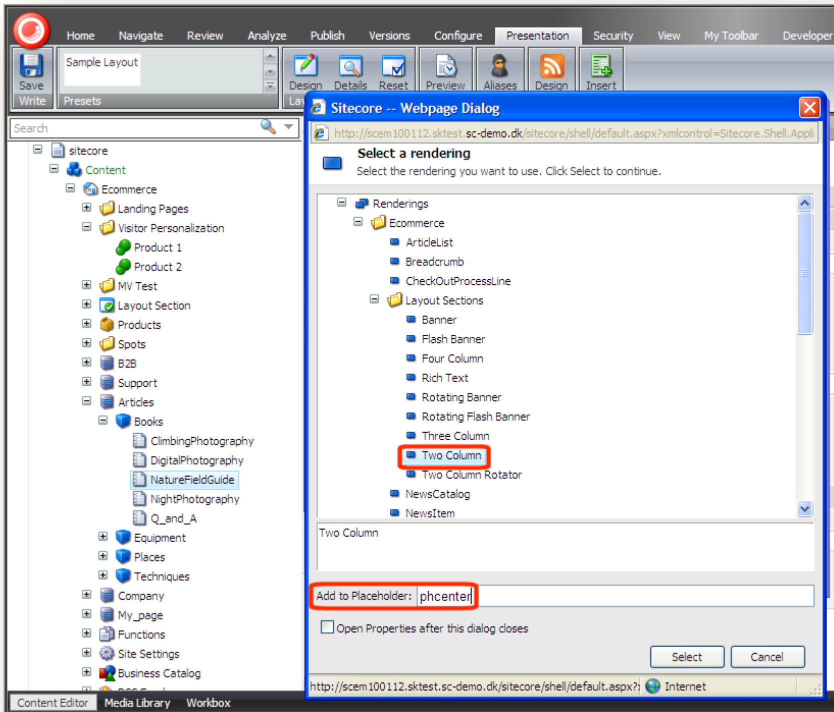
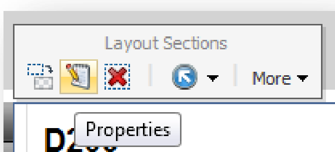
6. In the **Presentation** tab, **Layout** group, click **Details**.



7. In the **Select a rendering** dialog box, select the **Two Column** layout rendering and in the **Add to Placeholder** field, add the *phcenter* placeholder.
8. Click **Select**.
9. Open the **Page Editor** and navigate to the *Nature Photography* page.
10. Select the **Two Column** control and then in the floating toolbar, click **Properties**.

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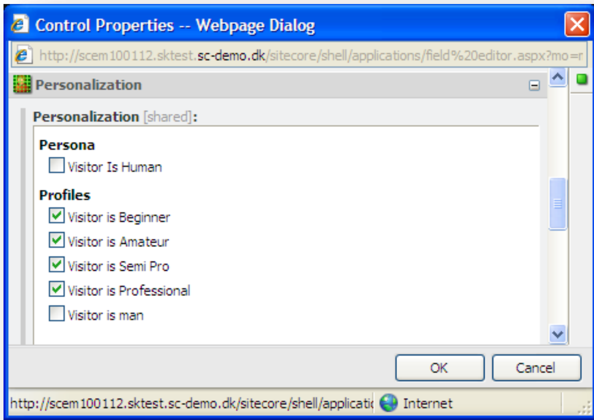
11. Scroll down to **Personalization** and select appropriate rules. In this example, select all the rules you created earlier.




12. Click **OK** to save your changes.

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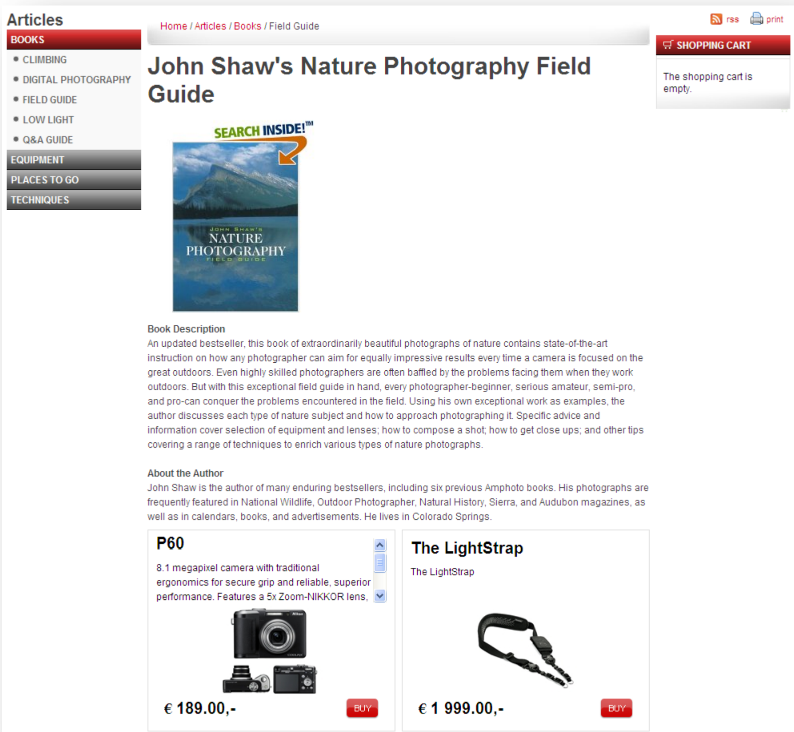
## Testing Personalization

Open a new browser window and visit several pages on your webshop. Depending on your profile strategy and how you have allocated the profile values, you will accumulate a score when you visit different pages on your website. For example, if you visit pages that carry high values for a *Beginner*, when your score reaches a set value or above, you will see the product and accessory that are targeted at beginners when you visit the *Nature Photography* page.

In this example, the *P60* camera and *lightstrap* accessory are displayed when a visitor profile score is 25 or above.




Personalization is a very powerful e-commerce marketing tool. If used in the correct way, it can be a very effective way of increasing your website conversion rate and ROI.

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