Sitecore CMS 6.5

Marketing Operations Cookbook

A marketer's guide to managing how your website engages with your visitors

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Chapter 1

Introduction

The Marketing Operations Cookbook contains instructions for marketers and content authors who work with Sitecore. This guide contains step by step instructions on the key tasks involved in setting up and configuring Sitecore Analytics on your website. The subjects covered include creating profile cards and assigning them to content items, setting up goals, campaigns, and events, as well defining personalization rules and assigning them to content items.

All of the examples in this cookbook use the Office Core website. This website is designed to highlight the functionality available in the Digital Marketing System.

This cookbook contains the following chapters:

- **Chapter 1 — Introduction**
  This introduction contains a description of the content, aims, and the intended audience of this cookbook.
- **Chapter 2 — Content Profiles**
  This chapter provides step by step instructions on how to create profiles, goals, campaigns, multivariate tests, and personalization. It also includes instructions on configuring these items in the Page Editor.
- **Chapter 3 — Goals, Campaigns, and Events**
  This chapter provides step by step instructions on how to assign profile values to content items, how to associate goals and campaigns with content items, and how to assign events, failures, and settings.
- **Chapter 4 — Patterns and Pattern Cards**
  This chapter describes pattern cards and how to create them.
- **Chapter 5 — Testing**
  This chapter provides step by step instructions on how to create multivariate tests using the Page Editor and the Content Editor and how to evaluate your test results.
- **Chapter 6 — Personalization**
  This chapter provides step by step instructions on how to implement real time personalization using the Page Editor and the Content Editor.
- **Chapter 7 — Viewing Reports**
  This chapter describes the standard reports that are available in the Engagement Analytics report viewer.

1.1 The Sitecore Customer Engagement Platform

The Sitecore Engagement Analytics brings together web content management, analytics, and marketing automation in one powerful suite of tools. Normally, you would have to spend a lot of time and money integrating any number of different 3rd party products and tools to achieve this but Sitecore Engagement Analytics gives it all to you in one streamlined task oriented set of tools. Sitecore Engagement Analytics allows you to create, manage, and measure the effectiveness of online and offline campaigns. You can create profiles and measure how well visitors match these profiles and then display personalized content to these visitors on the fly.

Sitecore Engagement Analytics helps you understand who your customers are and what they want to accomplish when they visit your web site. Sitecore Engagement Analytics generates a visitor profile for every visitor based on the pages they visit and their behavior during the visit. With Sitecore Engagement Analytics, content profiling becomes a natural part of content creation and can be implemented by every content author. You can easily adjust your content profiles as you get to understand more about your visitors and their behavior.

Sitecore Engagement Analytics allows you to build detailed profiles of the visitors to your web site — even first time visitors. You can see how they came to your website, what they searched for that brought them to your site, as well as what they searched for on your site. You can see which pages and content they visited, as well as the paths they used to reach that content. You can also see which goals they achieved on your website and any information that they entered in the forms that your website contains. You can use these rich profiles to push personalized content to visitors that match the different profiles that you have defined for your website.

One component in Sitecore Engagement Analytics is the Executive Dashboard that contains large number of reports that help you analyze and quantify the results that your campaigns and your website are achieving. This lets to make informed decisions about the design, structure, and content of your website and the campaigns that you run.

Sitecore Engagement Analytics lets you configure multivariate and A/B tests out of the box without the assistance of any developers. These tests allow you to fine tune your campaigns and evaluate their success. Sitecore Engagement Analytics gives you an unprecedented understanding of your online campaigns, and lets you see how each campaign meets the goals of your website and how many conversions it achieves. Sitecore Engagement Analytics helps you track newsletter campaigns, Google Adwords, online ads, and any other online initiative, so that you can find out more about each respondent. You can see what they did once they reached your site and what content they viewed.

When the same visitor comes to your website several times, each individual session is tied together by a global cookie to give you an integrated picture of the visitor’s profile, history, preferences, as well as what brought them to your website in the first place. This integrated picture gives you far greater insight into the behavior of your visitors and into the success or failure of you campaigns than CPC (Cost per Click) or CPM (Cost per Impression) because you can associate multiple visits, goals, actions, and types of visitor with each campaign. This lets you focus your activity on the campaigns that give the greatest return and improve or cancel the campaigns that are underperforming.

Sitecore Engagement Analytics gives your sales team instant information about any prospects that visit your website. New prospects are identified by the profile and score that their activity on your website generates — what they downloaded, what they searched for, and what they viewed. Existing prospects can also be identified by the GeoIP information that the Sitecore Engagement Analytics reports contain. This GeoIP information includes the country, state, city, and the registered company name of every visitor. This information is correlated with the visitor’s activity on your website and can be easily integrated with leading CRM products. All of this combines to give your sales team qualified leads and unique insight into the needs and interests of new prospects and ultimately helps you to achieve online success.

Security Roles and Sitecore Engagement Analytics

You must be a member of certain Sitecore security roles to access the functionality in Sitecore Engagement Analytics.

The important Sitecore Engagement Analytics security roles are:

Security Role	Grants
Client Authoring	Access to the Marketing Center.
Analytics Reporting	Access to the Engagement Plan Monitor and to the Executive Dashboard. Requires membership of the *Client Authoring* role.
Analytics Maintaining	Access to the Engagement Plan Designer and Supervisor. Requires membership of the *Client Authoring* role.
Analytics Testing	Access to the Test Lab in the Marketing Center as well as access to the test functionality in the Page Editor and in the Content Editor. Requires membership of the *Client Authoring* role. Members of this role can create and edit test variations. Users who are not members of this role can switch test variations. Members of the *Minimal Page Editor* role cannot switch test variations.
Analytics Personalization	Access to the personalization functionality in the Page Editor and in the Content Editor. Requires membership of the *Client Authoring* role. Members of this role can create and edit personalization rules. Users who are not members of this role can switch personalization variations. Members of the *Minimal Page Editor* role cannot switch personalization variations.
Analytics Content Profiling	Access to the content profiling functionality in the Page Editor and in the Content Editor. Requires membership of the *Client Authoring* role.

All of the analytics roles are members of the *Client Users* security role.

Chapter 2

Content Profiles

In Sitecore, you must assign content profile values to all of the content on your website. These values are then used to create a profile of each individual visitor as they move through your website. You can also create some goals that you want your visitors to achieve when they visit the site.

This chapter describes how content profiling works and contains step by step instructions for creating profile cards and for assigning profile cards to content items.

This chapter contains the following sections:

- Content Profiling
- Profiles, Profile Keys, and Profile Cards
- Assigning a Profile Card to a Content Item in the Content Editor
- Assigning a Profile Card to a Content Item in the Page Editor

2.1 Content Profiling

By assigning content profile values to all of the items that make up your website you are able to gain a better understanding of the behavior, actions, and interests of your website visitors. As a visitor moves through your website they are assigned the content profile values that you have defined for each item they visit. These values accumulate as the visitor navigates through the site and help you build up a profile of the visitor.

Marketers create content profiles, profile keys, and profile cards in the Marketing Center and content authors use the Content Editor to assign profile values to the contents of each web page. You can assign profile values to every Sitecore item that you use on your website.

2.1.1 Profile Values, Web Pages, and Content Items

It is important to understand the difference between a web page and a Sitecore content item and how this affects the profile score that visitors accumulate as they navigate through the website.

In Sitecore, a web page is not a single entity but consists of numerous Sitecore items. When a visitor views a page, the visitor is assigned the profile values of the item identified in the URL for that page and is not assigned the profile values of all the items that make up the page.

2.1.2 Pre-requisites

Before you assign profile values to content items you should consider creating:

- Website personas — the personas that your website is designed for. These are also the personas that your content authors should have in mind when they create the content that you use on your website.
- A profiling strategy — an understanding of the content on your website and the personas it is designed for. This understanding helps you assign the appropriate profile values to the content of your website.

Personas

When you design your website, you should create some personas that correspond to the different types of people that you want to visit your website.

Personas are fictional characters that represent different user types within your target demographic, attitude, and/or behavior set that might use your site in a similar way. A persona describes the life, habits, background, interests, and profession of a fictional character.

Having a good understanding of the market segments or demographics that your website seeks to attract makes it easier for you to create these personas and to design your website.

When your designers and content authors create your website and write the content for it they should ensure that it contains content that appeals to these personas.

Profile Cards

Creating profile cards and profile keys enables you to categorize the content on your website and ultimately helps you to classify the visitors to your website.

The profile cards and keys that you create should reflect the interests of the personas that you designed your website for. When a visitor views a page on your website, they receive the profile values that you have assigned to that content item. As the visitor navigates through the website, they accumulate the profile values of all the pages they visit and this gives you an insight into the different kinds of content that they are interested in. The profile values that visitors accumulate are displayed as a bar chart in the session trail.

All of the information that you collect about the visitors to your website, the pages they view, the goals they complete, and the path they use to navigate through the site can help content authors to identify areas of the website that could benefit from improvement. You can also use this information to segment the visitors to your website and to create rules for personalization.

Profile Values

The profile values that a visitor accumulates during a visit give you an insight into the visitor's level of interest in your website. For example, assigning a high lead profile value to an item, such as a brochure download page, means that when a visitor views this page they are demonstrating a high level of interest in reading one of your brochures and are potentially interested in buying one of your products and can be targeted as a potential sales lead.

This information can be particularly useful to your sales team. For example, if a visitor achieves a high lead profile value, this can indicate that they are a potential customer and therefore represent a sales opportunity.

Examples of profile values:

Profile Values	Example
Lead	Pages related to price carry a high lead profile value on your website. Knowing which visitors achieve a high lead profile value can help your sales team to target potential new customers.
Investor	A visitor has viewed the annual report page on your site. Assigning a high investor profile value to this page can help you identify visitors that are interested in investing in your company.
Big spender	Assigning a high profile value to a page that records the total purchase amount used by visitors to your site can indicate which visitors are the biggest spenders.

To demonstrate this concept, the Office Core website is configured to record *Lead* profile values. The deeper a visitor navigates into the website, the higher is the lead profile value that they accumulate. Some pages and actions carry higher lead profile values than others. For example, downloading a brochure carries a high lead profile value.

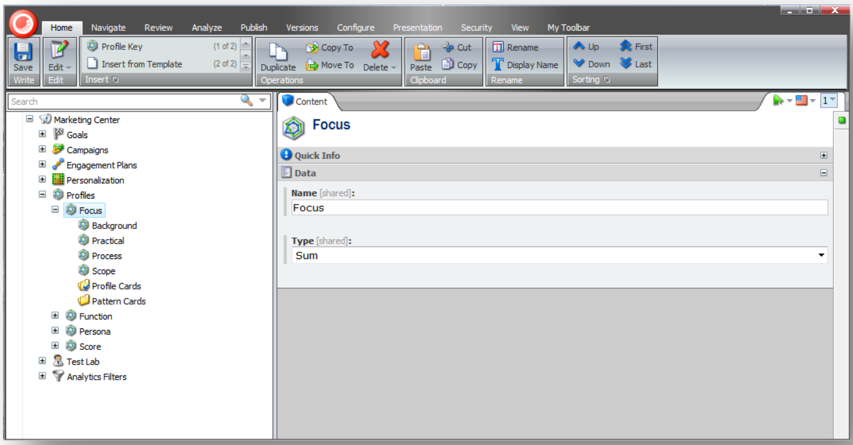
The Engagement Analytics application contains the lead reports and you can drill down to the session trail to see the lead profile values accumulated by each visitor.

2.2 Profiles, Profile Keys, and Profile Cards

A web site can consist of any number of pages. When you assign profile values to each page it can be very difficult to ensure that you assign them consistently across the entire website.

To facilitate the process of assigning profile values to content items, Sitecore lets you create profile cards that contain a specific set of profile values. You can use these cards to assign these predefined profile values to content items.

Sitecore Engagement Analytics comes with some predefined profiles that illustrate a number of these key concepts. Each of these profiles has been assigned some profile keys.



The predefined profiles and profile keys are:

Profiles	Profile Keys
Focus	Background
	Practical
	Process
	Scope
Function	Building Trust
	Call to Action
	Create Desire
	Define Concept
Persona	Cecile
	Chris
	Ian
	Sandra
Score	Lead

Focus

This profile contains profile keys that you can use to indicate the emphasis that each content item has. Does the content item contain mainly background information or does it focus on practical information?

Function

This profile contains profile keys that you can use to indicate the purpose of each content item. Is the content item designed to build trust in your products or to increase the visitor's desire to own one of the products?

Persona

This profile could be used to contain the profile keys that reflect the personas that you use when you design your website.

Score

This profile contains the lead value that you can assign to each content item. Does viewing this content item indicate that the visitor is a potential customer or not?

Under each profile you can also create any number of profile cards that contain predefined profile values that you can assign to the content items on your website.

2.2.1 Creating a Profile Card

Before you start assigning profile values to the content items that make up your website, you will probably need to create some new profile cards.

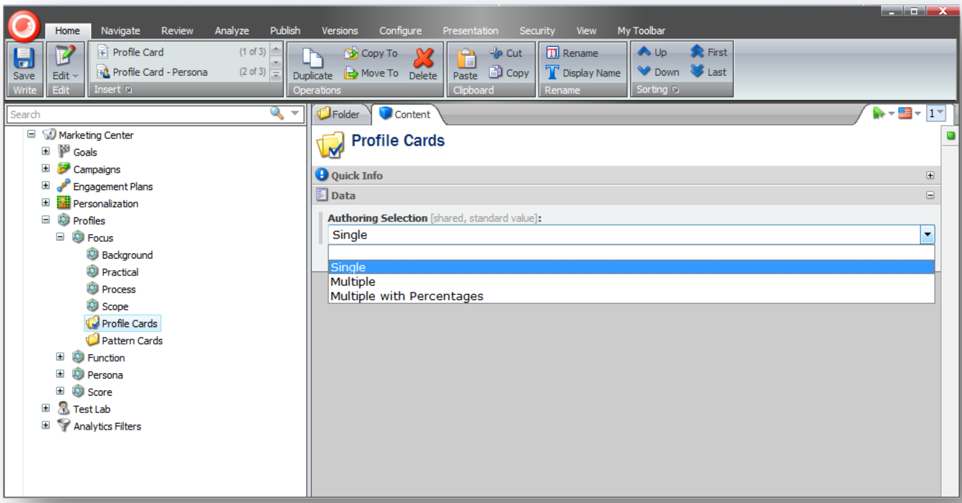
Important
A profile card is not the same as a persona. A persona describes the life, habits, background, interests, and profession of a fictional character and therefore contains aspects from all of the profiles. A profile card only refers to the aspects of a single profile.

Before you start to create profile cards, you should consider the profiles that are suitable for your website and whether it is appropriate to assign one or more profile cards for each profile to the content items that make up your website. If you decide that it is appropriate to assign multiple profile cards, you should also specify whether you want to be able to specify the relative importance that the content item has for each profile card.

To specify how many profile cards you can assign to content items:

1. Click the **Sitecore** menu and then click **Marketing Center**.
2. In the **Marketing Center**, expand the content tree and click *Profiles.*
3. Select the profile that you are interested in and then click the *Profile Cards* folder.

4. On the **Content** tab, in the **Authoring Selection** field, click the drop-down arrow and select one of the options.

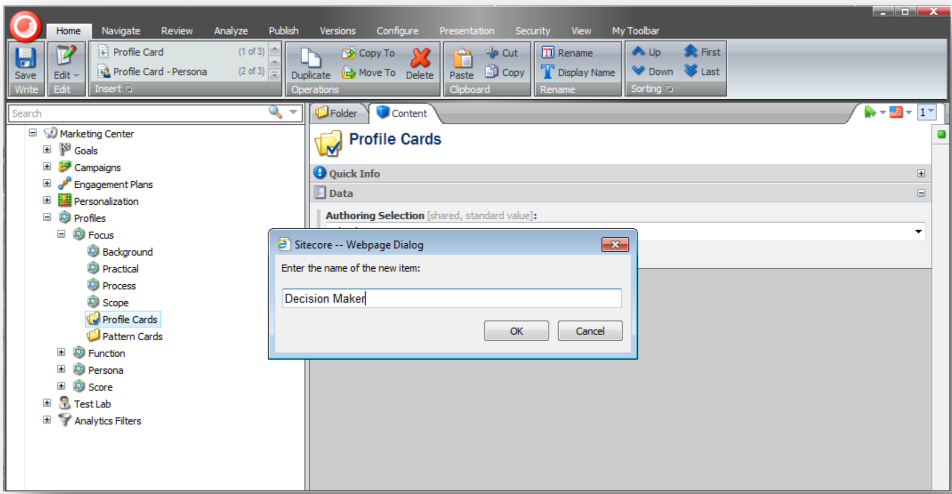


The options are:

Option	Description
Single	You can only assign one profile card to each content item.
Multiple	You can assign several profile cards to each content item.
Multiple with Percentages	You can assign several profile cards to each content item and assign a percentage weighting to each profile card.

To create a profile card:

1. Click the **Sitecore** menu and then click **Marketing Center**.
2. In the **Marketing Center**, expand the content tree and click *Profiles.* Select the profile that you are interested in and then click the *Profile Cards* folder.
3. In the **Home** tab, in the **Insert** group, click *Profile Card* to create a new profile card.



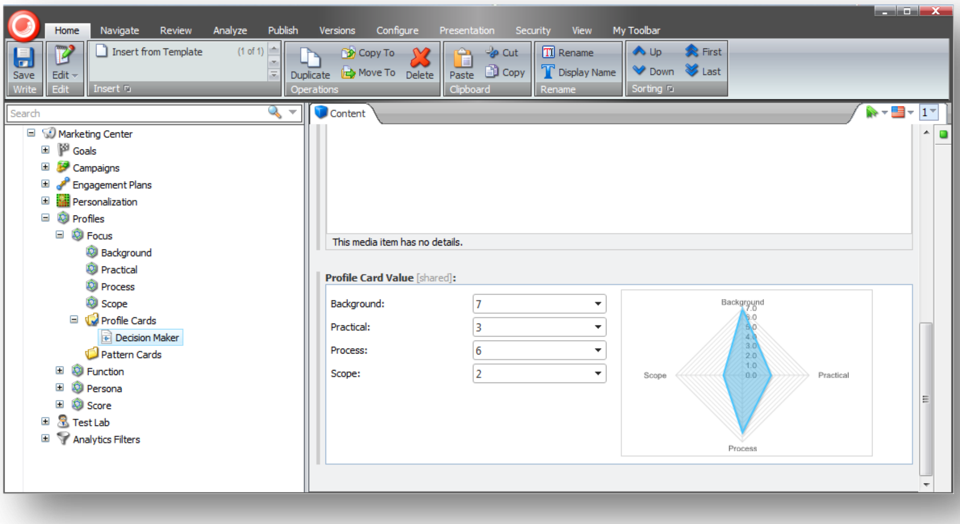
4. Give the profile card a name, such as, *Decision Maker*.

Assigning Profile Values to a Profile Card

After you create the profile card, you can assign some appropriate profile values to this card.

To assign profile values to a profile card:

1. In the **Marketing Center**, select the new profile card.
2. In the **Content** tab, scroll down to the **Profile Card Value** field.
3. In the **Profile Card Value** field, select the profile values that you want to assign to this card.



This item also contains a number of other fields that you can use to enter background information about this profile that may be useful for content authors who are not familiar with your target demographics.

You can create as many profile cards for each profile as you need.

4. In the ribbon, click **Save**.

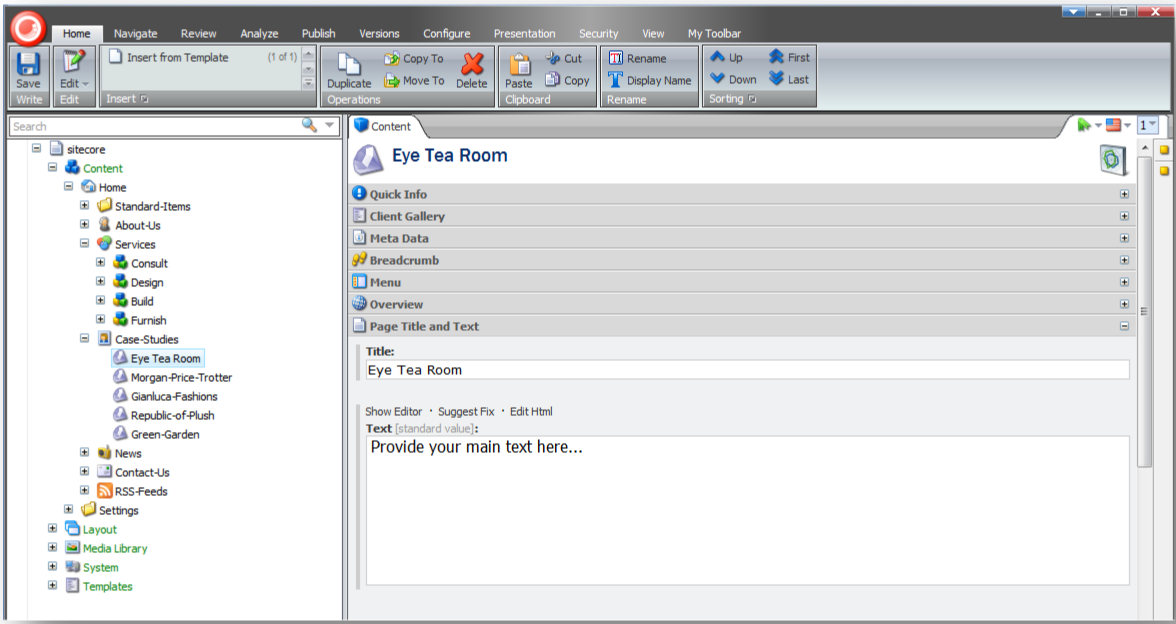
You can create any number of profiles and profile keys but it is worthwhile planning a profiling strategy before you start creating profiles and profile cards.

2.3 Assigning a Profile Card to a Content Item in the Content Editor

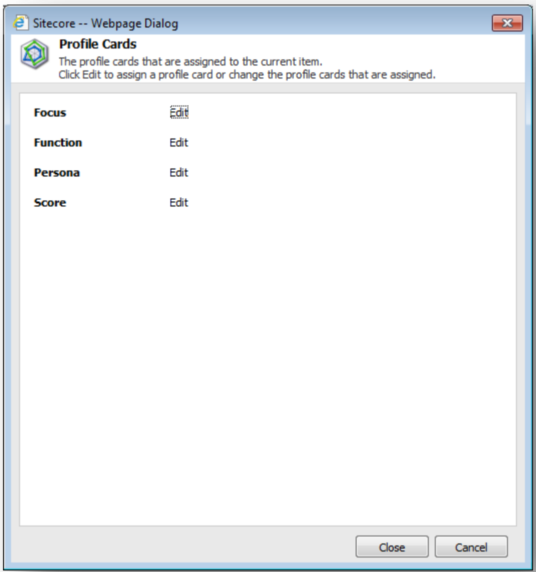
After you have created the profile cards and assigned profile values to them, you can start assigning the profile cards to the content items that make up your website. Assigning profile cards to content items makes it easier for you to implement profile values consistently across your website.

To assign a profile card to a content item:

1. In the **Content Editor**, navigate to the item that you want to assign a profile card to.



2. On the **Content** tab, click the profile card icon in the top right-hand corner and the **Profile Cards** dialog box appears.



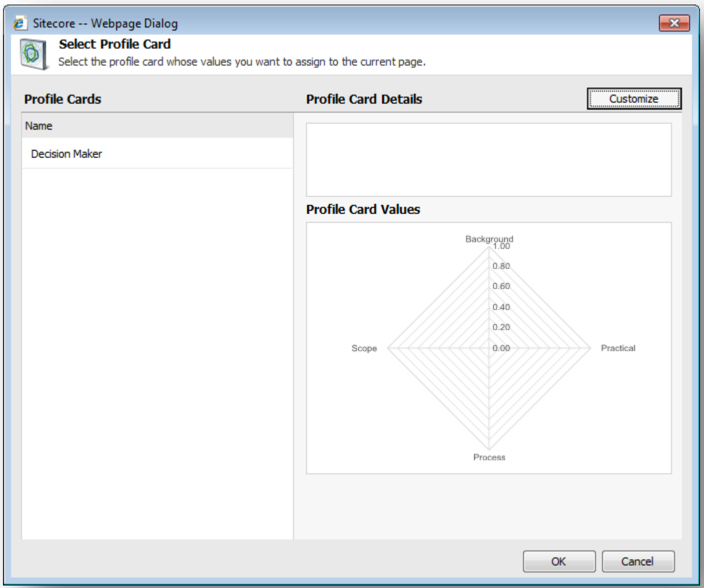
3. In the **Profile Cards** dialog box, select the profile that you are interested in and click **Edit** and the **Select Profile Card** dialog box appears.

   The **Select Profile Cards** dialog box looks different depending on which option you selected earlier in the **Authoring Selection** field.

   The options are:

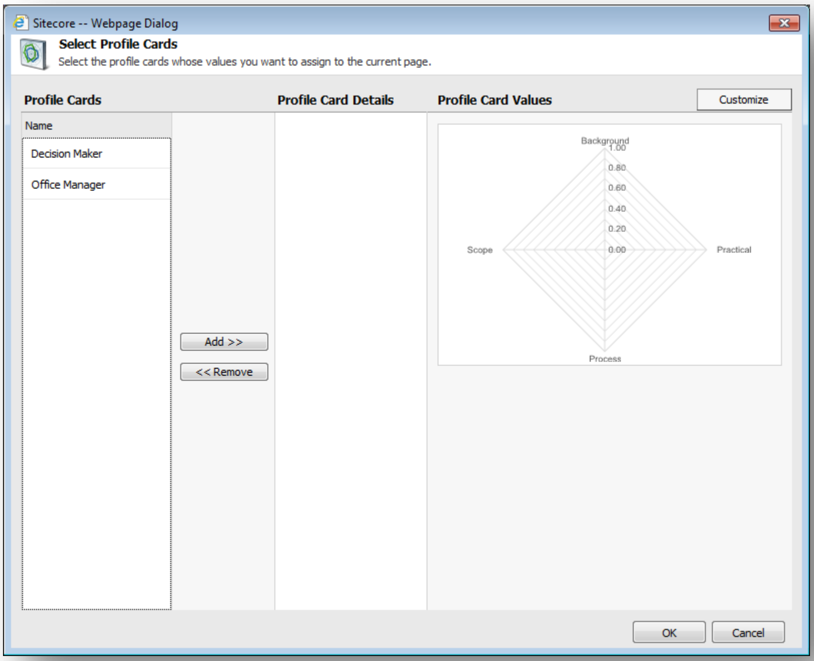
Option	**Description**
Single	You can only assign one profile card to each content item.
Multiple	You can assign several profile cards to each content item.
Multiple with Percentages	You can assign several profile cards to each content item and assign percentages to each profile card.

   If you selected the *Single* option in the **Authoring Selection** field, the **Select Profile Cards** dialog box looks like this:

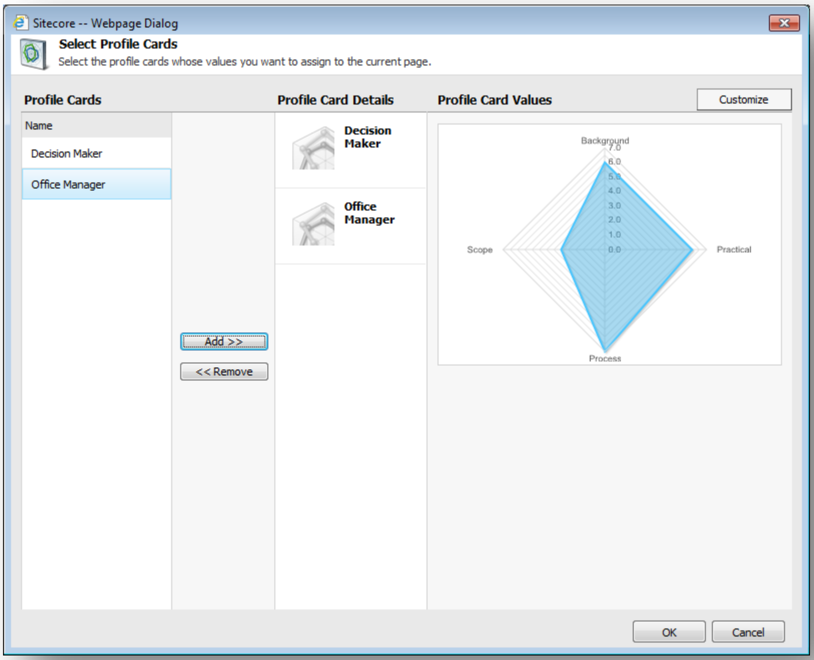


4. In the **Select Profile Cards** dialog box, in the **Profile Cards** field, select the profile card that you want to assign to this content item and the profile values that you gave to this card are assigned to the current content item.

If you selected the *Multiple* option in the **Authoring Selection** field, the **Select Profile Cards** dialog box looks like this:

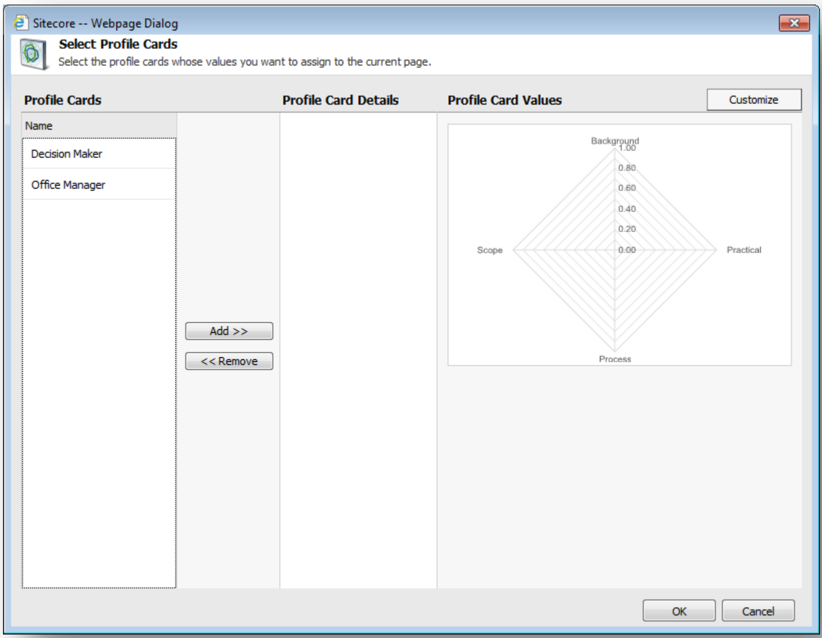


5. In the **Profile Cards** field, select the profile cards that you want to assign to this content item and click **Add**.

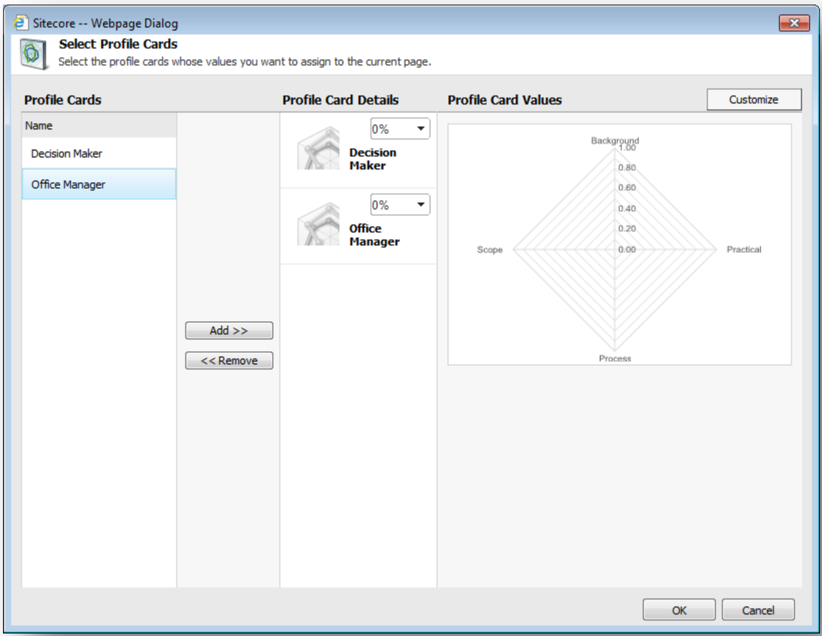


The total value of the all the profile cards that you select is assigned to the content item.

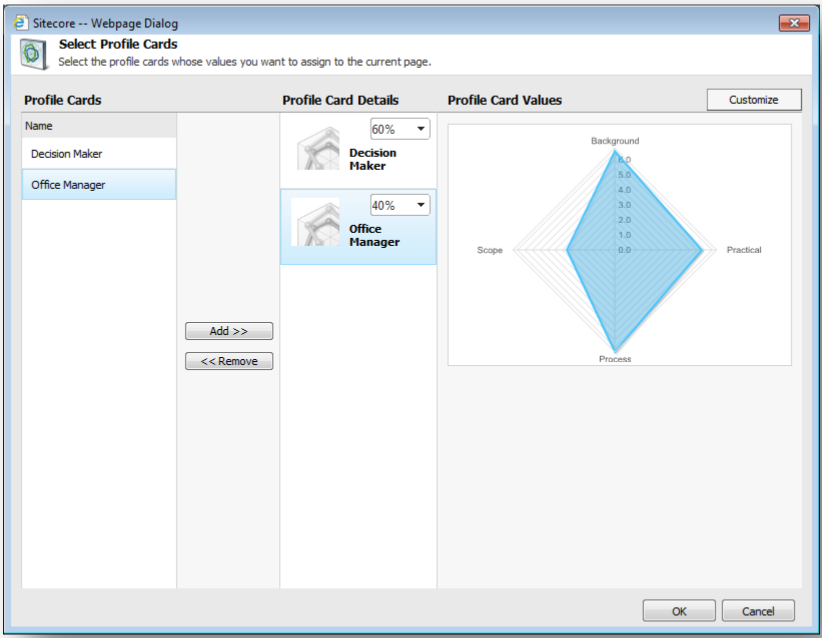
If you selected the *Multiple with Percentages* option in the **Authoring Selection** field, the **Select Profile Cards** dialog box looks like this:



6. In the **Profile Cards** field, select the profile cards that you want to assign to this content item and click **Add**.



7. In the **Profile Card Details** field, in the drop down box for each profile card, select the percentage of importance/relevance that you want to assign to each profile card.

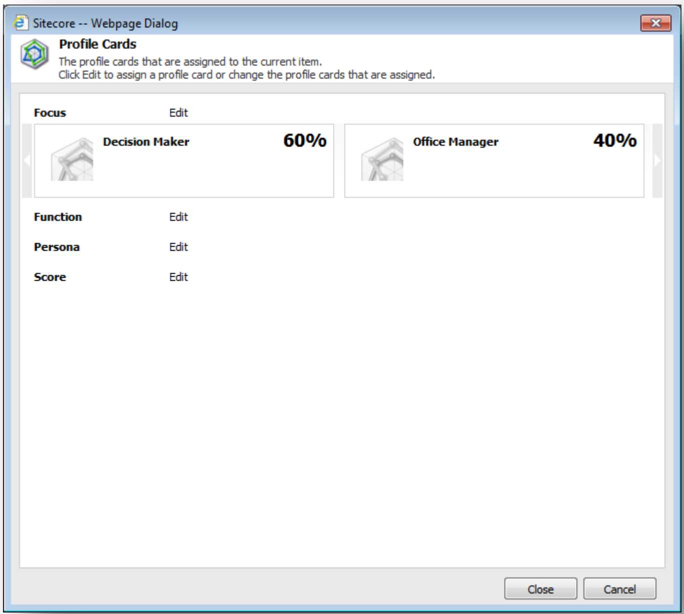


The sum of the percentages that you select *must* be 100%.

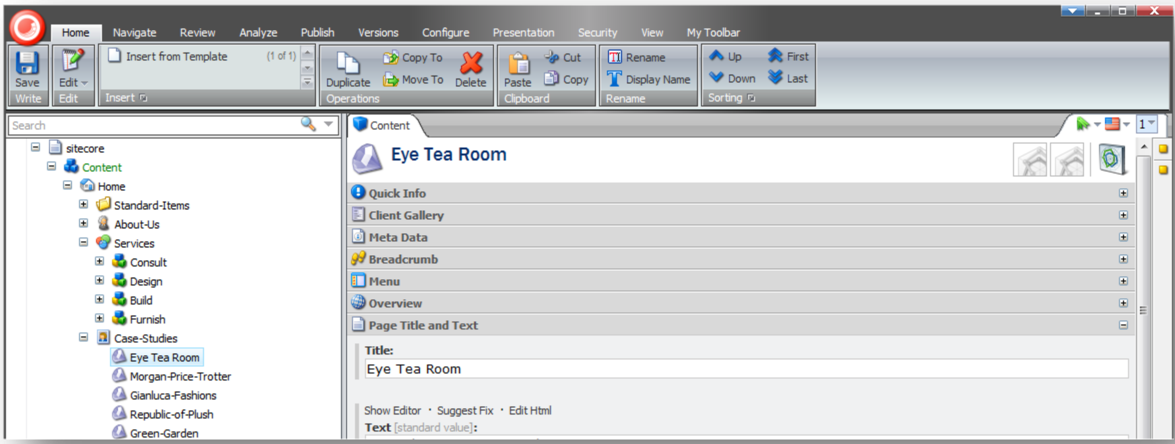
If the sum of the percentages that you select is not 100%, Sitecore displays a message informing you of this and that allows you to recalculate the percentages automatically or to change them manually.

If you decide that Sitecore should recalculate the percentages automatically, it increases or decreases the percentages proportionally.

After you have assigned some profile cards to the content item, the **Profile Cards** dialog box reflects the changes you have made.

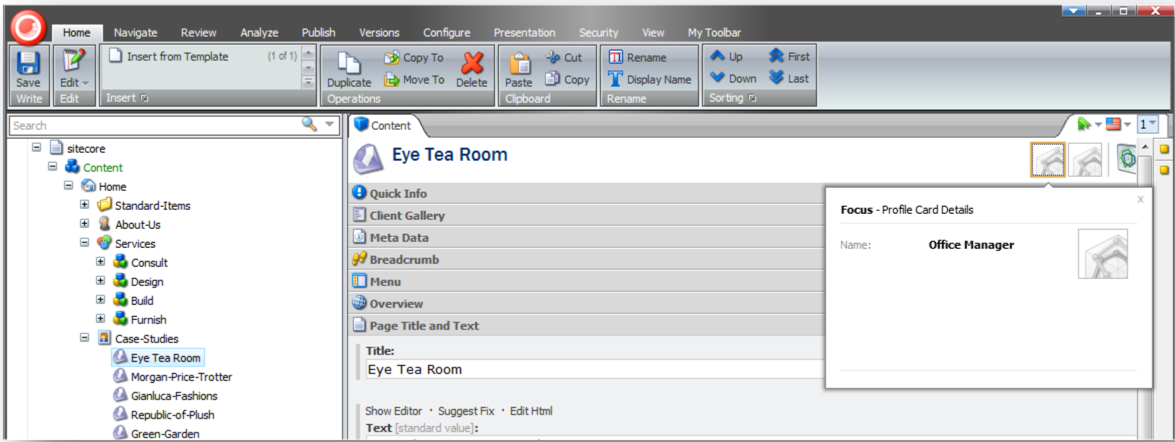


When you have assigned some profile cards to the content item, it displays some more information at the top of the **Content** tab.



The **Content** tab now displays an icon for each of the profile cards that you have assigned to this content item.

When you move the mouse over one of the profile card icons the **Content Editor** displays a tooltip that tells you what profile card it is.



2.3.1 Assigning Custom Profile Values to a Content Item in the Content Editor

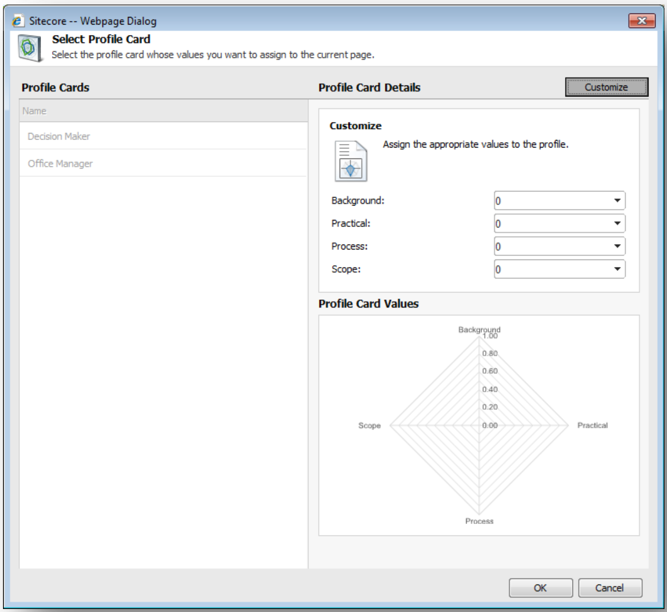
When you are assigning profile values to the content items on your website, there could be some content items for which the profile cards that you have created are not appropriate. In these cases, you can assign custom profile values to the content item.

Important
You can only assign custom profile values to content items if you select *Single* in the **Authoring Selection** field when you decide which kind of profile cards you want to use.

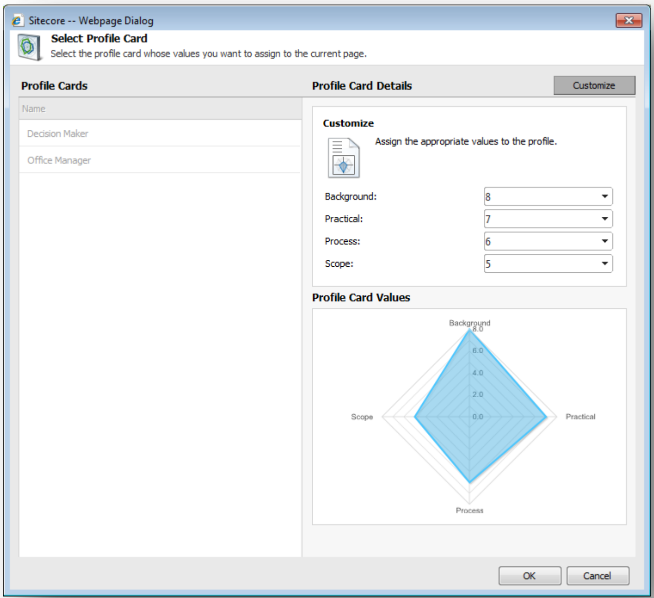
To assign custom profile values to a content item:

1. In the **Content Editor**, navigate to the content item that you want to assign profile values to.

2. In the **Content** pane, select the profile that you want to create custom profile values for and assign to the content item.



3. In the **Select Profile Card** dialog box, click **Customize**.
4. In the **Customize** section, click the drop down arrow for each profile value and select the values that you want to assign to the content item.



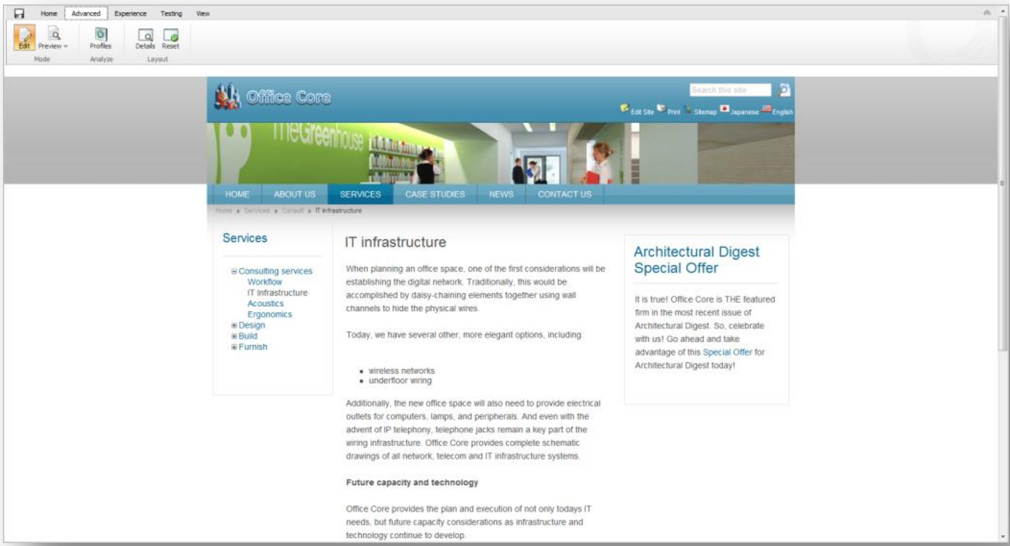
5. Click **OK** to save your changes. The profile values you selected are assigned to this content item.

2.4 Assigning a Profile Card to a Content Item in the Page Editor

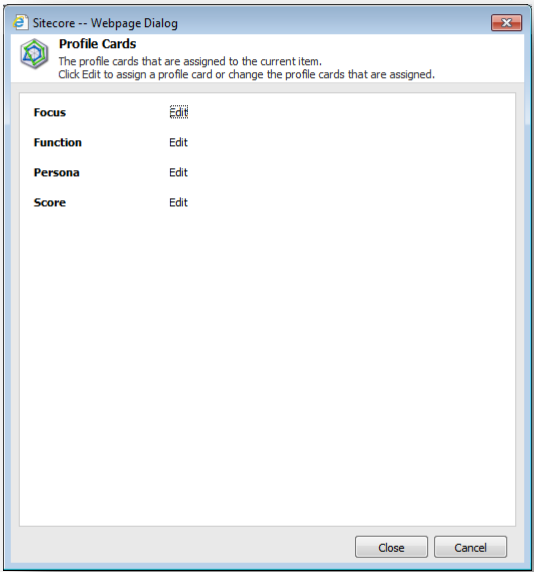
When content authors use the Page Editor to create and edit the content items that make up your website, they can also assign profile values and profile cards to these items.

To assign profile cards and profile values to an item in the Page Editor:

1. In the **Page Editor**, navigate to the page that contains the item that you want to assign profile values to and expand the ribbon.



2. In the ribbon, in the **Analyze** group, click **Profiles** to open the **Profile Cards** dialog box.



3. The functionality available here is the same as in the **Content Editor**.

For more information about assigning profile cards, see the section *Assigning a Profile Card to a Content Item in the Content Editor*.

Chapter 3

Goals, Campaigns, and Events

Sitecore lets you manage your marketing campaigns and use them to engage with your customers. You can also create goals and events that can be associated with these campaigns and help you measure the success of your campaign activities — both online and offline.

Furthermore, you can specify that visitors who participate in a campaign and come to a particular landing page are automatically assigned to a state in an engagement plan.

This chapter contains the following sections:

- Goal
- Campaign
- Events
- Analytics Page Settings

3.1 Goals

You create goals to measure the success of your website and your marketing campaigns — both online and offline.

You can create a goal for any activity that visitors can perform on your website.

Examples of goals:

- Download a brochure
- Register for an e-mail newsletter
- Visit a particular page
- Sign up for an online demo

Once you have created some goals, you can measure the conversion rate for each goal — the percentage of visitors that achieve a particular goal. The website performance reports show goals and conversion rates.

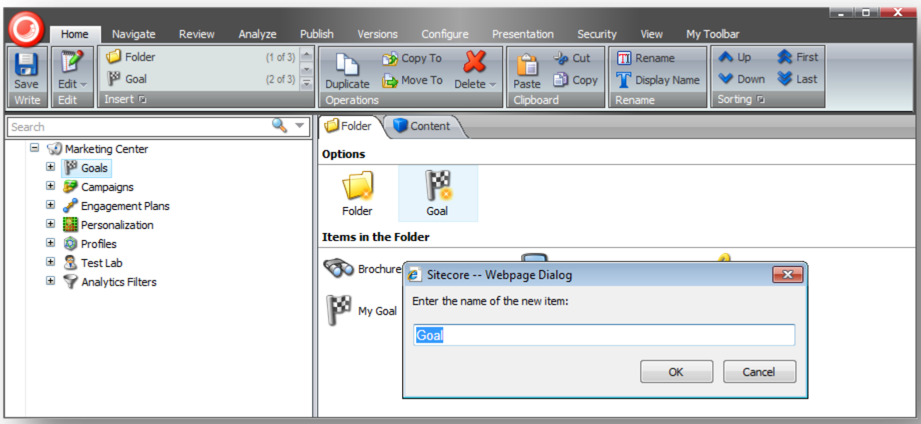
You can create an engagement plan that uses goals to evaluate what action should be taken. For more information about engagement plans, see the *Engagement Automation Cookbook*.

You can create personalization rules that are based on the goals that a visitor achieves. For more information about personalization rules, see the section *Personalization*.

3.1.1 Creating a Goal

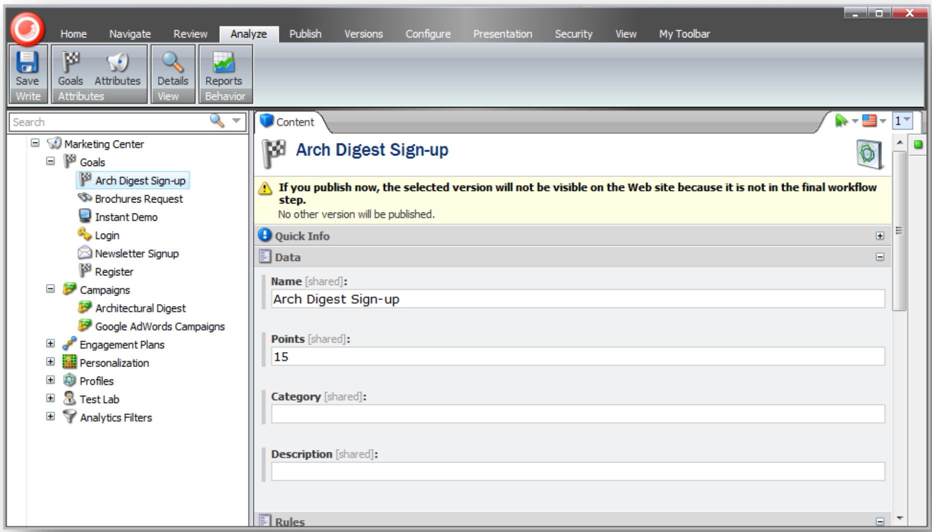
To create a new goal:

1. Open the **Marketing Center** and click *Goals*.
2. On the **Home** tab, **Insert** group, click *Goal* to create a new goal definition item.



3. Give the goal a name, such as, *Arch Digest Sign-up*.

4. In the new goal definition item, enter the appropriate values.



Field	Value
Name	The name for your goal.
Points	The number of engagement value points that are assigned to a visitor when they achieve this goal. Every time a visitor lands on a page that has a goal or page event associated with it, they accumulate the engagement value points that are assigned to that event or goal. When the visitor leaves the website this score becomes the engagement value for that visit. The number of engagement value points allocated to each goal is not important but the ratio between engagement value points assigned to the different goals is. For example, the marketer must understand why the *Request for Demo* goal is four times more valuable than the *Newsletter Registration* goal.
Category	A suitable description, such as, *User has registered for Arch Digest*.
Description	This defines the event as a system event. For administrators and advanced users only.
Rule	Select the rule that should be evaluated when the page event associated with this goal is triggered.
IsAuthorFeedback	Select this checkbox if the page events associated with this goal are of interest to content authors.
IsFailure	Select this checkbox to define the event as a failure. For administrators and advanced users only.
IsGoal	Select this checkbox to ensure that the goal appears in the **Content Editor**, **Goals** dialog box. You can then associate the goal with a content item.
IsSystem	Select this checkbox if the page event describes a system event.

5. Click **Save** to save the new goal.

Engagement Value Points

When you create a goal, you can assign some engagement value points to it. The number of engagement value points that you assign should reflect the value that you ascribe to each goal. You can also assign profile cards and profile values to each goal. Every time a visitor achieves a goal, Sitecore assigns these profile values and engagement value points to their profile. This allows you to measure the engagement value of each visit as well as the accumulated engagement value of each visitor.

You can create personalization rules that are based on the number of engagement value points that a visitor accumulates. You can also create engagement plans that evaluate the number of engagement value points that a visitor has achieved to determine what action should be taken.

For more information about engagement value points and engagement value, see the *Executive Dashboard Cookbook*.

For more information about personalization rules, see the section *Personalization*.

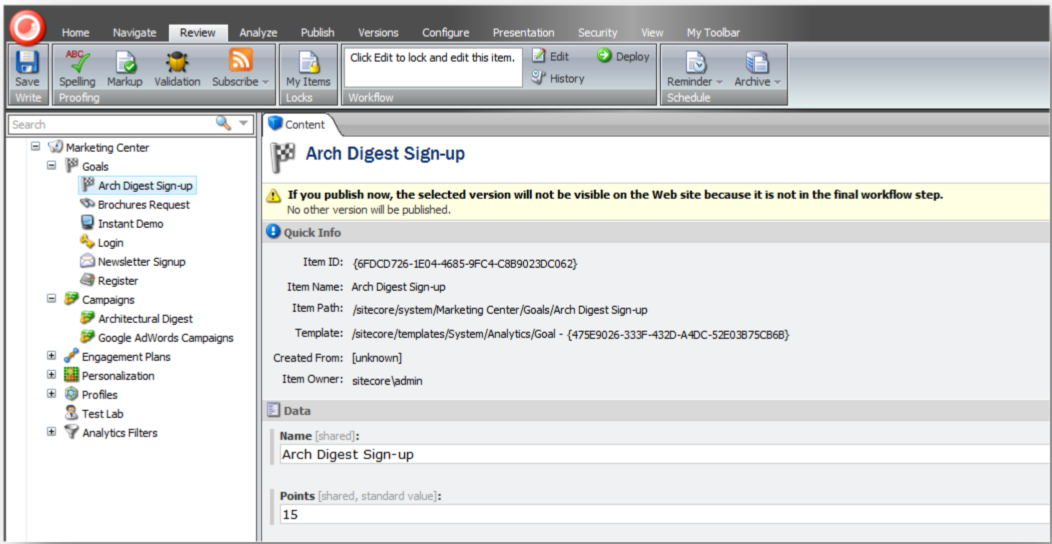
For more information about engagement plans, see the *Engagement Automation Cookbook*.

3.1.2 Deploying and Publishing a Goal

When you create a goal, it is subject to a workflow. You must deploy the new goal before it becomes available in the Marketing Center and you can associate it with a content item or a campaign.

To deploy a goal:

1. In the **Marketing Center**, select the goal that you want to deploy.
2. On the **Review** tab, in the **Workflow** group, click **Deploy**.



The new goal is now available in the Marketing Center and you can associate it with content items and use it in your campaigns.

However, like every other item, a goal must also be published on your website before it is available to your website visitors.

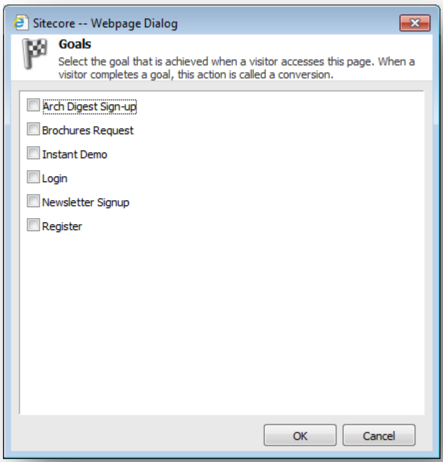
3.1.3 Associating a Goal with a Content Item

After you have created a goal and deployed it, you can associate it with a content item. This means that the goal is achieved every time a visitor views this item.

In this example, we associate the goal with a landing page that contains a form that lets visitors who read a magazine called *Architectural Digest* sign up for a site audit at a 50% reduction.

To associate a goal with a content item:

1. In the **Content Editor**, navigate to the content item you are interested in. In this example we want to associate the goal with a landing page.
2. Click the **Analyze** tab and in the **Attributes** group, click **Goals**.



3. In the **Goals** dialog box, select the goal that you want to associate with this item.

   In this example, we associate the *Arch Digest Sign-up* goal with a landing page that contains the form that the visitor must use to avail of the offer.

3.2 Campaigns

A campaign is a promotion or advertising initiative designed to encourage people to come to a website and perform some desired actions.

Sitecore Analytics supports two types of campaigns:

- Online Campaigns
- Offline Campaigns

You can view reports that show which of your campaigns are the most successful. You can then improve or drop unsuccessful campaigns and improve your ROI.

You can create an engagement plan that uses campaigns to evaluate what action should be taken. For more information about engagement plans, see the *Engagement Automation Cookbook*.

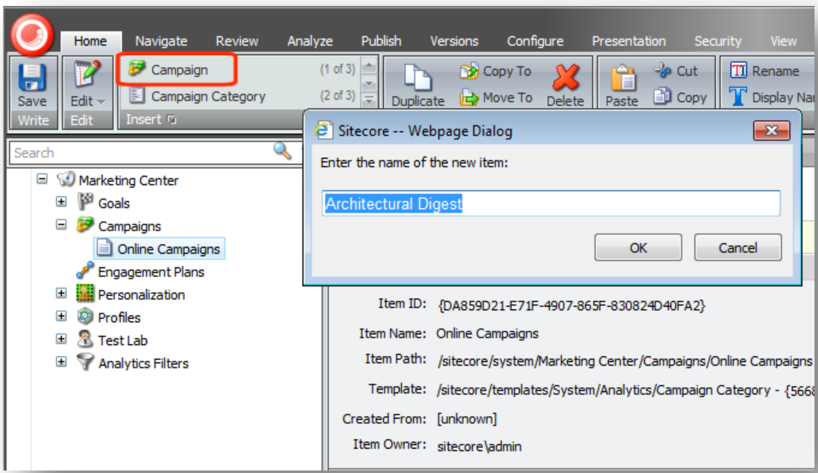
You can create personalization rules that are based on the campaigns that a visitor takes part in. For more information about personalization rules, see the section *Personalization*.

3.2.1 Creating a Campaign

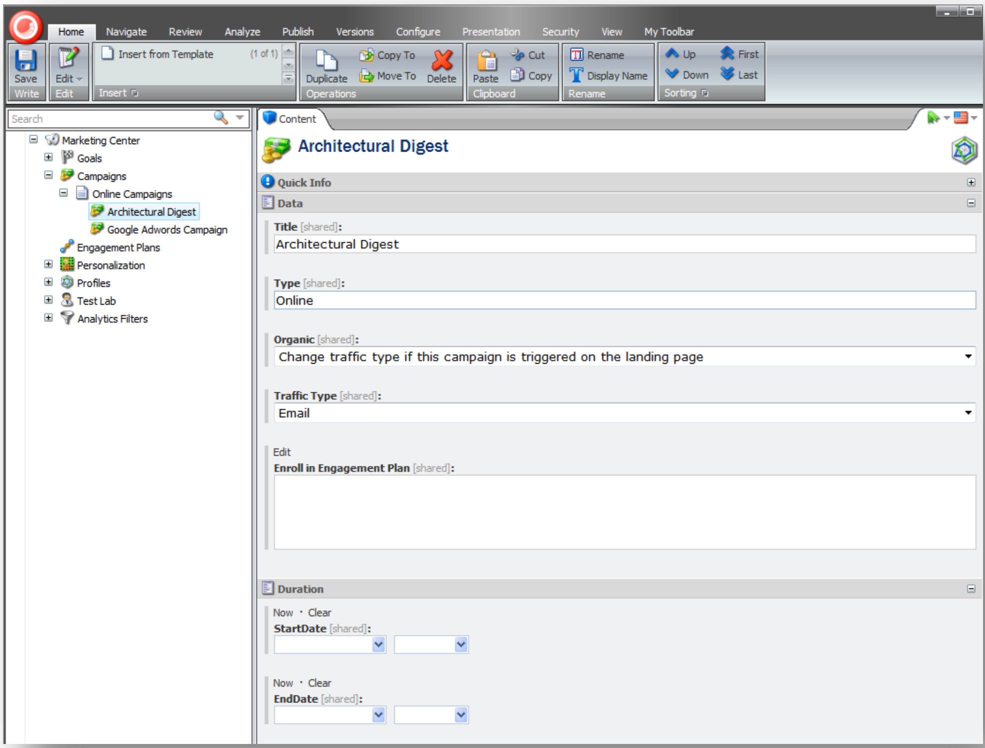
When you create a campaign, you first need to create a campaign category. Campaign categories enable you to categorize your marketing campaigns. In the Executive Insight Dashboard, you can view each campaign and campaign category using the *All campaigns* drop-down list.

To create a campaign and campaign category:

1. In the **Marketing Center**, click *Campaigns*, and then on the **Home** tab, in the **Insert** group, click *Campaign Category*.
2. Give your new category a name, such as, *'Online Campaigns'* and click **OK**.
3. Select the *'Online Campaigns'* category and then on the ribbon, **Home** tab, **Insert** group, click *Campaign* to create a new campaign item
4. Give your new campaign a name, such as, *Architectural Digest* and click **OK**.



5. In the new campaign item, enter the appropriate values. If you wish, you can complete these fields later.



Field	Value
Title	The title of the campaign.
Type	The type of campaign — whether it is an online or offline campaign.
Organic	Whether or not the traffic type should be changed if this campaign is triggered.
Traffic Type	The type of traffic — how the visitor came to the website.
Enroll in Engagement Plan	Select the engagement plan state that you would like to assign visitors to when they participate in this campaign.
StartDate	The start date for the campaign.
EndDate	The end date for the campaign.
Cost	
Cost Base	
Cost per Click	
Cost per Day	
Hidden	Whether or not the campaign should be shown in reports. For example, you may not want to show campaigns that are created automatically in your campaign reports.

6. Click **Save** to save the new campaign.

For more information about engagement plans, see the *Engagement Automation Cookbook*.

Deploy the Campaign

You must deploy the new campaign item to ensure that it is available in the Marketing Center. If the campaign is not available, you cannot associate it with a content item.

To deploy a campaign:

1. In the **Marketing Center**, select the campaign that you want to deploy.
2. On the **Review** tab, in the **Workflow** group, click **Deploy**.

3.2.2 Associating a Campaign with a Content Item

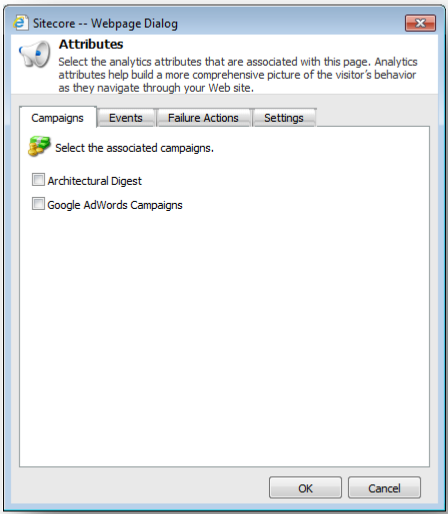
You must also associate the campaign with the appropriate content items.

To associate a campaign with a content item:

1. In the **Content Editor**, expand the content tree and navigate to the content item that you want to associate a campaign with.

   In this example we are using a landing page.

2. On the **Analyze** tab, in the **Attributes** group, click **Attributes**.



3. In the **Attributes** dialog box, click the **Campaigns** tab and then select the campaign that you want to associate with the content item.

Publishing the Goals and Campaigns

You must publish the new goals and campaign items to make them available on your website

- In the **Publishing** wizard, select the **Smart Publish** option.

3.2.3 Viewing Campaigns in Engagement Analytics

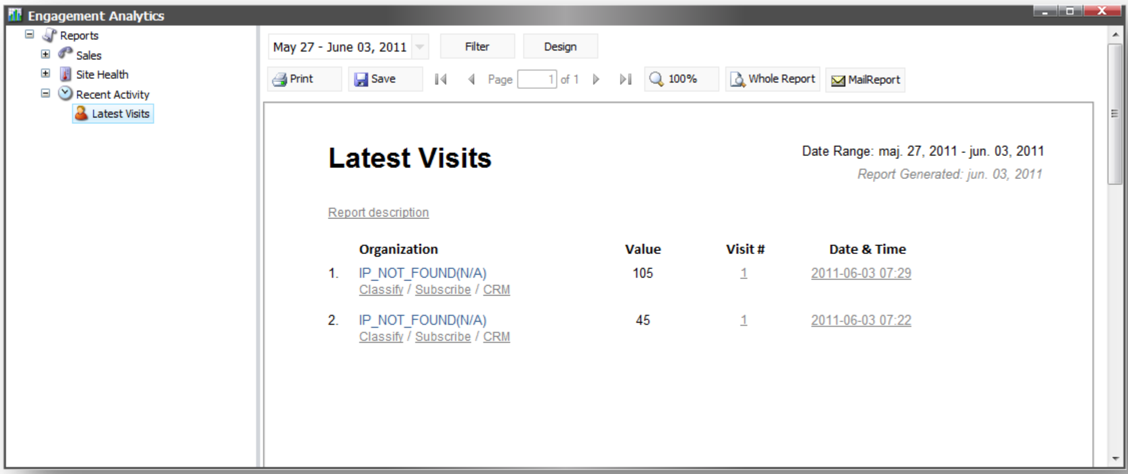
After you have published the relevant items on your website, you can launch your campaign to attract visitors to come to your website and achieve the goals that you have defined.

Once visitors can access these pages and achieve these goals, you can view the statistics generated by their visits and evaluate the value achieved by your campaigns.

To view the visitor activity:

1. In the **Sitecore Desktop**, click **Sitecore**, **Engagement Analytics**.

2. In the **Engagement Analytics** dialog box, expand the *Recent Activities* node and then click *Latest Visits*.



As you can see, the **Value** column shows that some of the visitors have visited the page associated with the campaign, achieved the goal, and scored some points.

You can drill down into each session to get more detailed information about each visit.

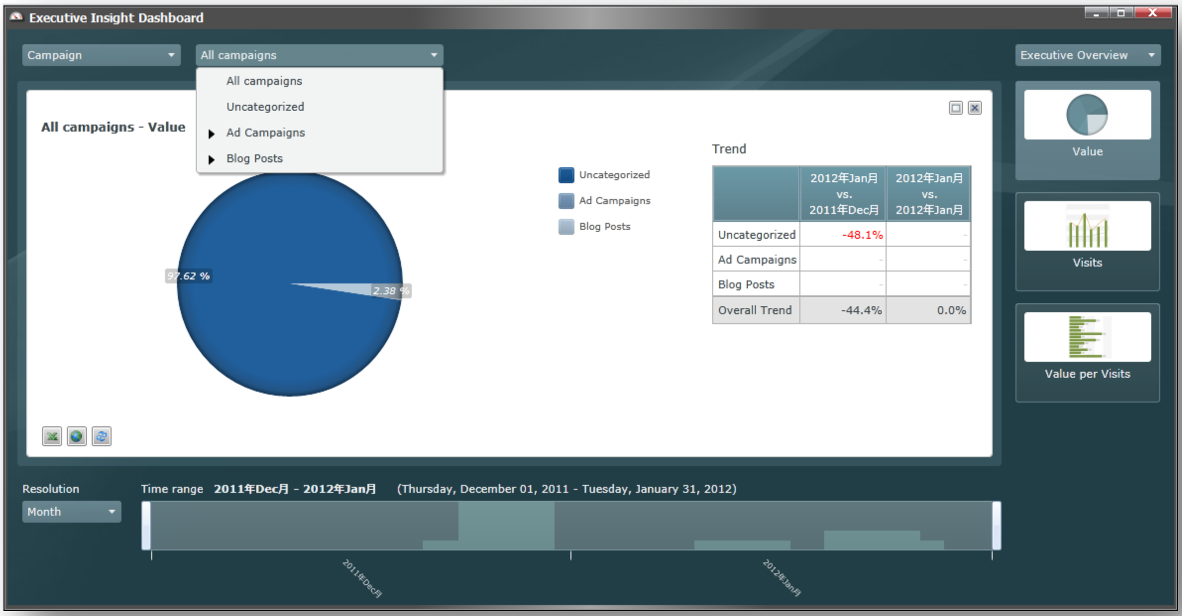
For more information about the reports that are available in the **Engagement Analytics** dialog box, see the *Marketing Operations Cookbook*.

3.2.4 Viewing Campaigns in the Executive Dashboard

You can use the Executive Insight Dashboard to view each campaign and campaign category using the *All campaigns* drop-down list.

To view campaigns in the Executive Insight Dashboard by campaign category:

1. In the Sitecore Desktop, open the Executive Dashboard.
2. Use the two drop-down lists at the top left of the dashboard to select a campaign or campaign category.



3. Select 'Campaigns' in the first top drop down box.
4. Use the second drop-down to view a specific campaign or campaign category.

For more information about viewing campaigns in the Executive Insight Dashboard, see the *Executive Dashboard Cookbook*.

3.3 Events

You can use events to track user activity on a website. You can track events, such as, download, search, registration, or logout. Tracking events help to build up a more comprehensive picture of a visitor's behavior as they navigate through the website.

Goal and campaign events are triggered when visitors achieve certain objectives on the website or when they come to a site from a promotion or campaign that you have created. These events are tracked in Sitecore Engagement Analytics and appear in the campaign and conversion tracking reports.

Sitecore administrators can edit existing events and create additional events if you need them. The marketer *must* remember to specify how many engagement value points should be assigned to each event.

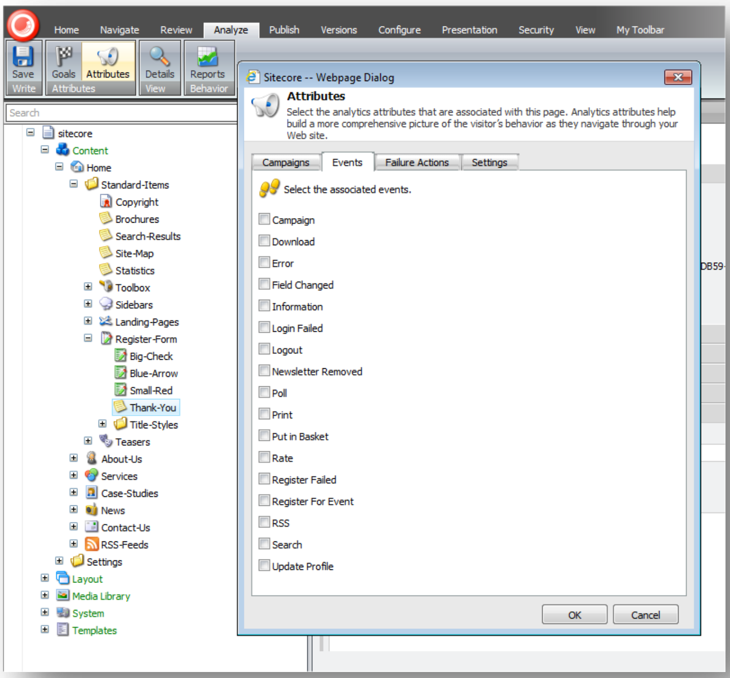
You can create engagement plans that use events to evaluate what action should be taken. For more information about engagement plans, see the *Engagement Automation Cookbook*.

3.3.1 Associating an Event with a Content Item

You can associate events with content items.

To assign an event to a content item:

1. In the **Content Editor**, expand the content tree and navigate to the content item that you want to associate an event with.
2. In the **Analyze** tab, in the **Attributes** group, click **Attributes** to open the **Attributes** dialog box.



3. In the **Attributes** dialog box, click the **Events** tab, and select the event that you want to associate with the content item.
4. Click **OK** to save your changes and close the **Attributes** dialog box.

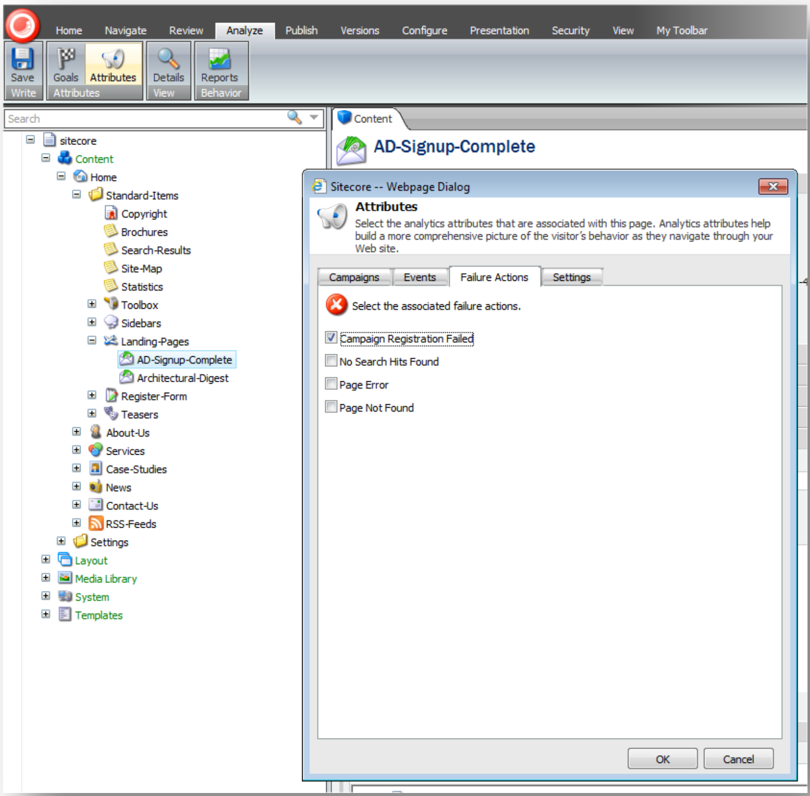
3.3.2 Assigning Failure Actions to Items

Failure actions are another type of event. Normally page failures are recorded programmatically. You can, however, use failure actions to record any page failures that occur on the website.

For example, if you have an error page that you display to site visitors when an error occurs, you can associate a failure action such as *Page Error* with this page. Then when a visitor sees this page, a page error is recorded in Sitecore Analytics and you can track all the page errors that occur on your site in this way.

To associate a failure action with a content item:

1. In the **Content Editor**, expand the content tree and navigate to the content item that you want to associate an event with.
2. In the **Analyze** tab, in the **Attributes** group, click **Attributes** to open the **Attributes** dialog box.



3. In the **Attributes** dialog box, click the **Failure Actions** tab, and select the event that you want to associate with the content item.
4. Click **OK** to save your changes and close the **Attributes** dialog box.

3.3.3 Engagement Value Points and Events

Sitecore administrators can create any extra events that you may need. They can also specify the number of engagement value points that you want to assign to each event.

Every time a visitor lands on a page that has an event associated with it, they accumulate the engagement value points that are assigned to that event. When the visitor leaves the website this score becomes the engagement value for that visit.

The number of engagement value points that you assign to each event should reflect the relative importance that you attach to each event and the importance that each event has in your marketing endeavors.

You can create personalization rules that are based on the number of engagement value points that a visitor accumulates.

For more information about engagement value points and engagement value, see the *Executive Dashboard Cookbook*.

For more information about personalization rules, see the section *Personalization*.

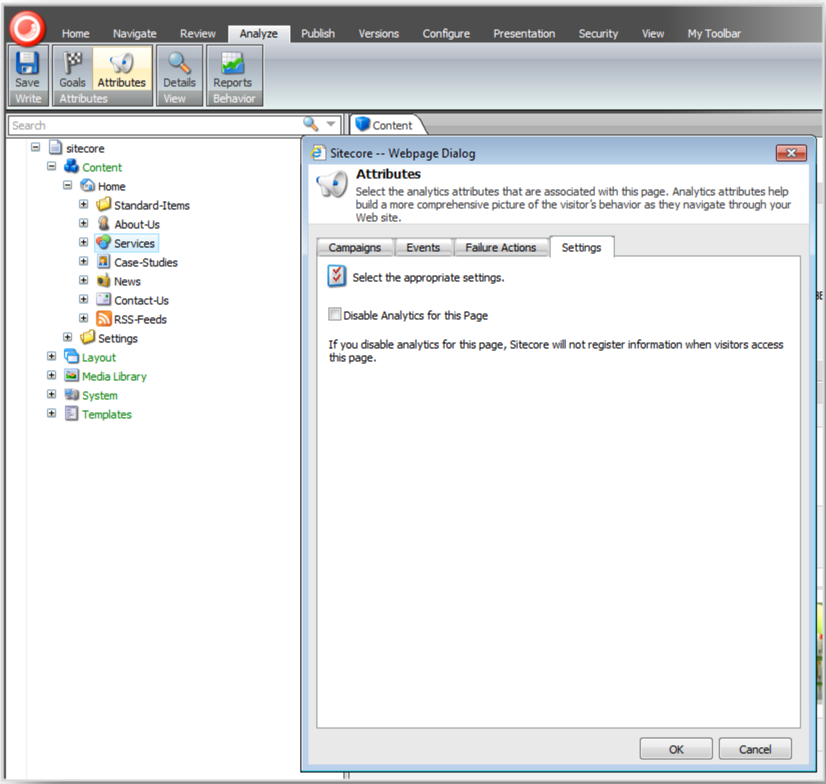
3.4 Analytics Page Settings

You can also disable analytics on any content item on your website. When you select the *Disable Analytics for the Page* setting, the page is no longer visible in the visitor session trail or any other reports in Sitecore.

This is useful if you, for example, have a page that automatically redirects visitors to another page. You may not want such a page to appear in reports and session trails.

To set an analytics setting on a content item:

1. In the **Content Editor**, expand the content tree and navigate to the content item that you want to set an analytics setting for.
2. Click the **Analyze** tab and in the **Attributes** group, click **Attributes** to open the **Attributes** dialog box.



3. In the **Attributes** dialog box, click the **Settings** tab and select the *Disable Analytics for this Page* setting to assign this setting to the content item.
4. Click **OK** to save your changes and close the **Attributes** dialog box.

Chapter 4

Patterns and Pattern Cards

Sitecore contains a system that lets you groups visitors according to their interests and behavior. This system makes it easier for you to design and implement engagement plans and personalization rules that consistently control the way your organization interacts with these visitor groups.

You create pattern cards that match some typical forms of visitor behavior. This chapter describes how to create pattern cards as well as some typical tasks where you can use them.

This chapter contains the following sections:

- Understanding Pattern Cards
- Creating a Pattern Card

4.1 Understanding Pattern Cards

Patterns cards allow you to classify visitors according to the behavior and interests that they exhibit when they visit your website.

Your website can receive thousands of visitors every day. This can make it very difficult for you to classify these visitors in a meaningful way. The visitor classification that you use can affect the way your organization interacts with the visitors to your website by influencing, for example, the actions that you can perform in your engagement plans, and the personalization rules that you implement on your website.

Sitecore allows you to create pattern cards that reflect the behavior and interests of specific types of visitor. You can then use these cards to define the actions that your organization should take when a visitor exhibits the behavior and interests personified by a pattern card.

When you create a pattern card, you must assign profile values to it. These profile values should reflect the interests and behavior of a particular type of visitor. For example, the profile values that you assign to the pattern card could be based on your understanding of the interests and behavior of a particular market segment that you have identified and are focusing some of your marketing activities on.

When a visitor to your website, navigates through the site and visits different pages and consumes different resources, they accumulate the profile values of all the pages and resources that they request. Sitecore calculates the average score that the visitor has accumulated for each profile and maps the visitor to the pattern card that is the closest match.

A visitor can only be mapped to one pattern card at a time. However, as a visitor navigates through your website, the pattern card that they are mapped to can change as they consume different resources on the site.

If you have created any engagement plans or personalization rules that use this pattern card, the visitor is then subject to these engagement plans and personalization rules. You can create several different pattern cards for each profile and use these to define different personalization rules.

4.1.1 Configuring Pattern Matching

Sitecore uses a measurement called *N-Dimensional Euclidean Distance* to calculate which pattern card a visitor's accumulated profile value most closely resembles and should therefore be mapped to.

When you configure the pattern matching feature, you must specify how many pages a visitor should request before Sitecore starts to map their accumulated profile score to a pattern card.

To specify the minimum number of pages that a visitor must request:

1. Navigate to `Sitecore build number\Website\App_Config\Include` and open the `Sitecore.Analytics.config` file for your website.
2. In the `configuration/sitecore/settings` section, add the following line:

   ```
   <setting name="Analytics.Patterns.MinimalProfileScoreCount"
   value="3"/>
   ```

   This means that Sitecore starts to map the visitor's behavior to a pattern card when they have requested more than three pages.
3. Change the value to what you think is a suitable number of page requests.

   The value you decide to use should be based on your understanding of your website, its size, and the number of pages that you assign profile values to.

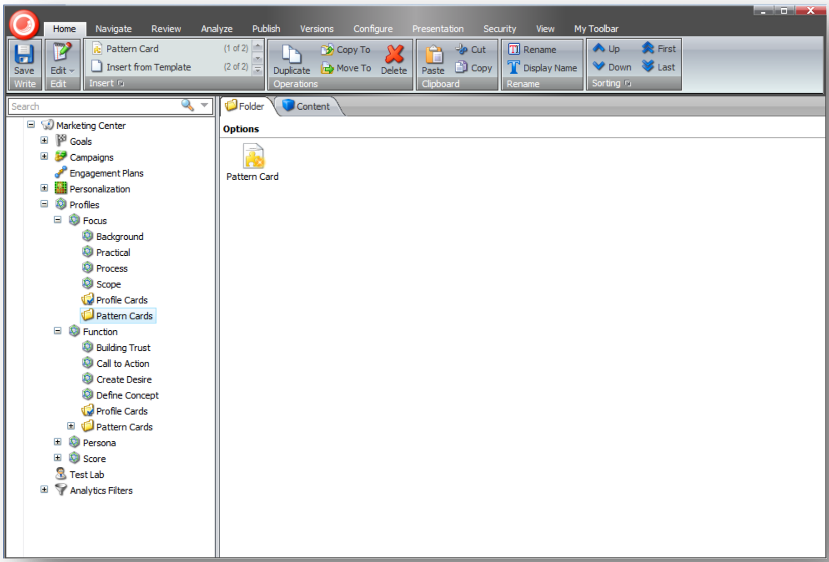
4.2 Creating a Pattern Card

Patterns cards allow you to classify visitors according to the behavior and interests that they exhibit when they visit your website.

When you create a pattern card, it can only reflect the visitor behavior that relates to a single profile. You can, of course, create pattern cards for each different profile that you have defined as well as create several different patterns cards for each profile.

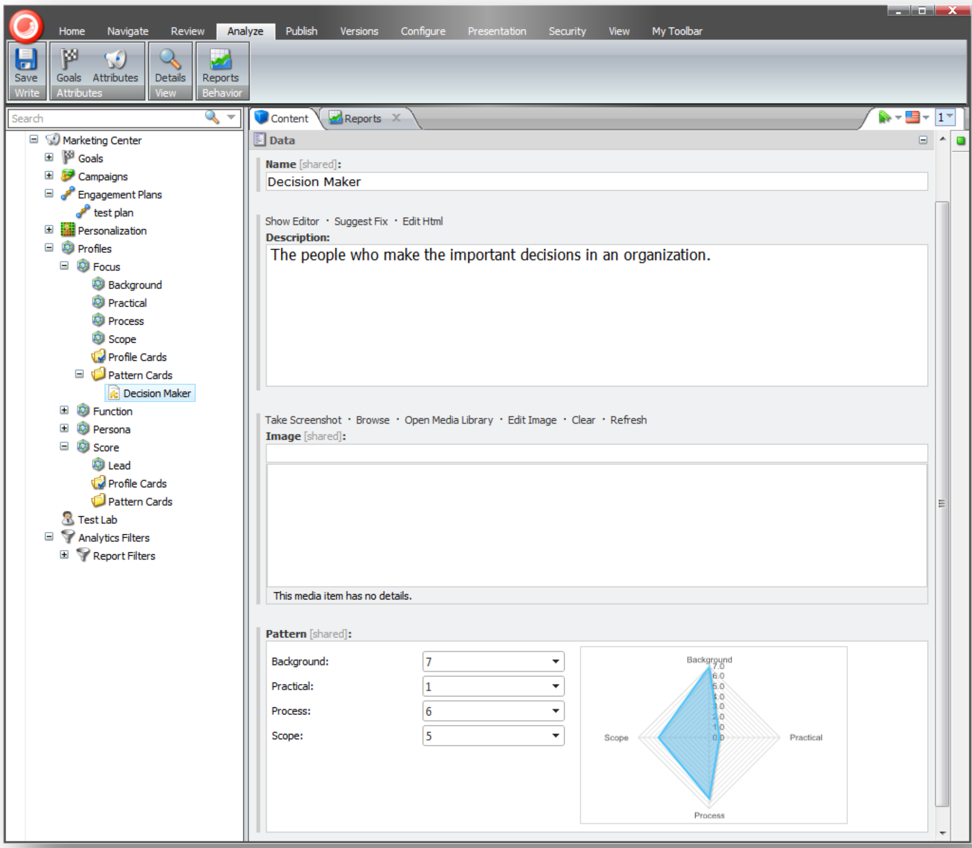
To create a pattern card:

1. Open the **Marketing Center** and expand the content tree.
2. In the content tree, navigate to *Marketing Center/Profiles*.
3. Select the profile that you want to create a pattern card for and expand it.



4. Select the *Pattern Cards* item and then on the **Folder** tab, click **Pattern Card**.
5. Give the new pattern card a name and click **OK** to create it.
6. In the new pattern card item, enter the appropriate information.

7. In the **Pattern** field, enter the profile values that you think are appropriate for the visitor behavior that you want to characterize.



8. Save your changes.

You can create several different pattern cards for each profile.

Planning your Pattern Card Strategy

You should plan your pattern card implementation carefully to ensure that you create the cards you need. These cards should reflect the visitor types or market segments that you are most interested in engaging with and you must assign appropriate profile key values to each pattern card.

You pattern card implementation should be based on an analysis of your website — its aims, content, and ambitions — as well as an analysis of your target audience — their characteristics, interests, and preferences. This analysis will not only affect the design of your website but also the way you interact with the visitors to your website, and the personalization rules that you create.

For more information about creating a personalization rule, see the section *Creating a Personalization Rule Based on a Pattern Card*.

Chapter 5

Testing

This chapter explains how to create and run multivariate tests using the Page Editor and the Content Editor. In Engagement Analytics, create MV tests to find the most effective content or combinations of content to use on your website.

This chapter contains the following sections:

- Multivariate Testing
- Creating a Multivariate Test in the Page Editor
- Creating a Multivariate Test in the Content Editor

5.1 Multivariate Testing

Sitecore Analytics lets you dynamically test the content of your website to find out which components or combination of components are the most effective.

You can create multivariate tests to see which variations of text and images work best with site visitors. This can be particularly useful as a part of your strategy when setting goals and optimizing campaigns.

The Page Editor is the most convenient and flexible tool to use when creating multivariate tests. It enables you to use existing Sitecore content or create new content ‘on the fly’ without leaving your website.

5.1.1 Page Editor Testing Options

When you use the Page Editor to create a multivariate test, you have the following testing options:

- Test existing content — prepare several test variations as content items and make them available in the content tree. For example, on the Office Core website, the Register-Form content in the Standard Items folder.
- Clone a content item — this enables you to duplicate test variable variations.
- Create new content — create new content ‘on the fly’ to use in your test.
- Change a component in the test — in the *Test the Component* dialog box, select *Enable variation of component design*. This allows you to choose a different rendering or sublayout.
- Hide a component in the test — in the *Test the Component* dialog box, select *Hide the Component*.
- Create a combination test — you can select multiple content on the same page if you want to run a combination test.

5.2 Creating a Multivariate Test in the Page Editor

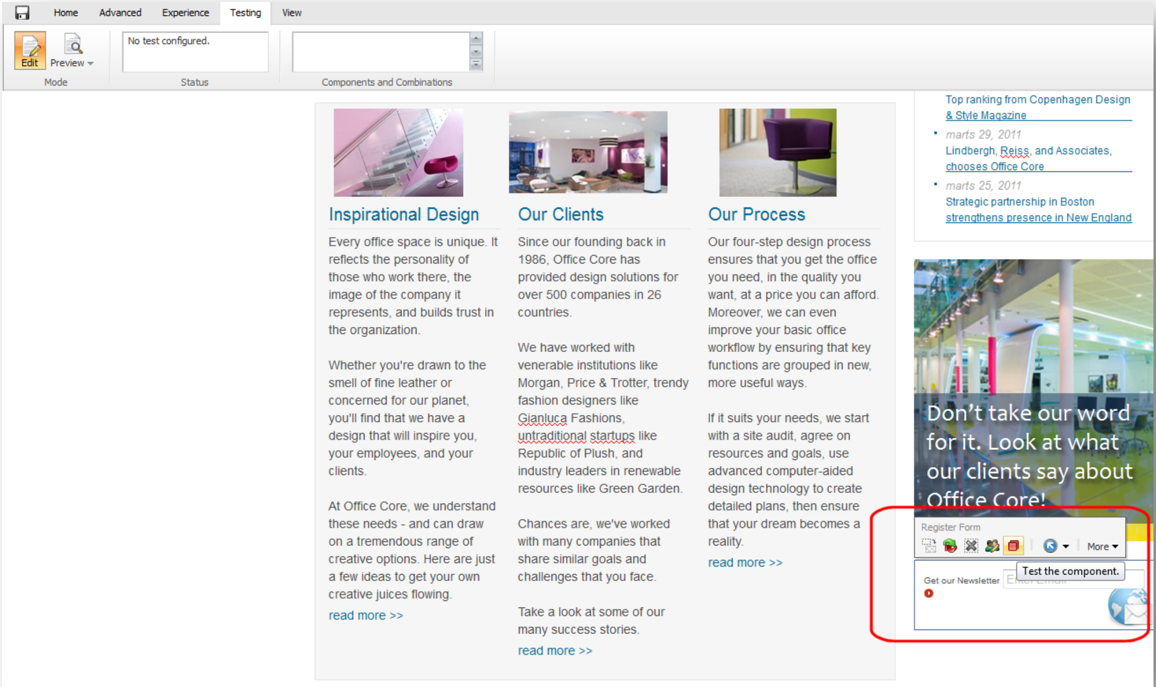
In this example, create a multivariate test for a newsletter register form. Visitors to your website enter their email address on this form to register for an e-mail newsletter. Test three different combinations of text and graphics to find out which generates the highest engagement value on the website and to indicate which content is most effective. Choose the most effective content as the winner.

When you have finish running the test, look at your results in the Stop the Test dialog box. You can see each test variable variation and an accumulated value next to each one. You can pick winning content in this way but first you should consider what effect the test has had on overall engagement value generated on the website. Has the winning content led to higher engagement values overall or just in relation to the goal assigned to the test variable?

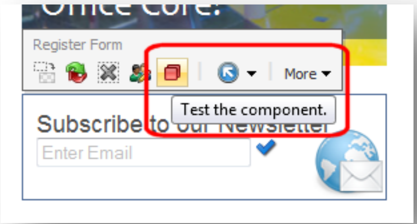
5.2.1 Creating an MV Test in the Page Editor

To create a multivariate test in the Page Editor:

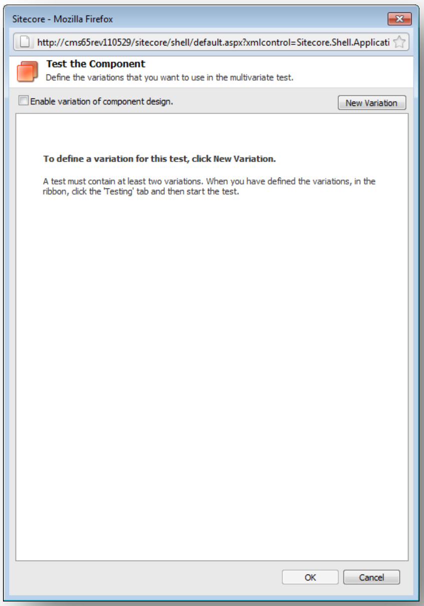
1. Open the Page Editor.
2. Select a component on your website to test. For example, the *Register Form*.



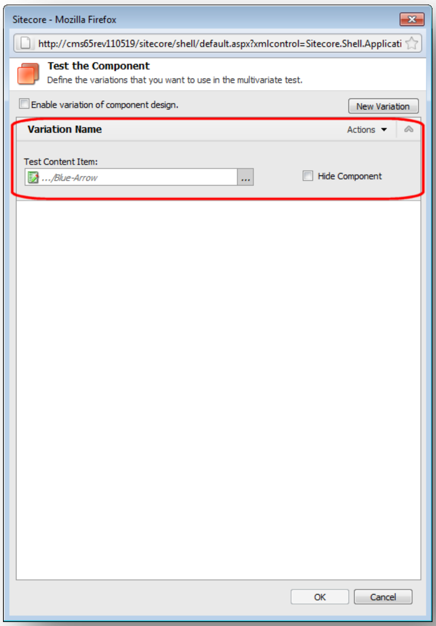
3. Move the mouse over the floating toolbar until you see the tool tip *Test the component*.



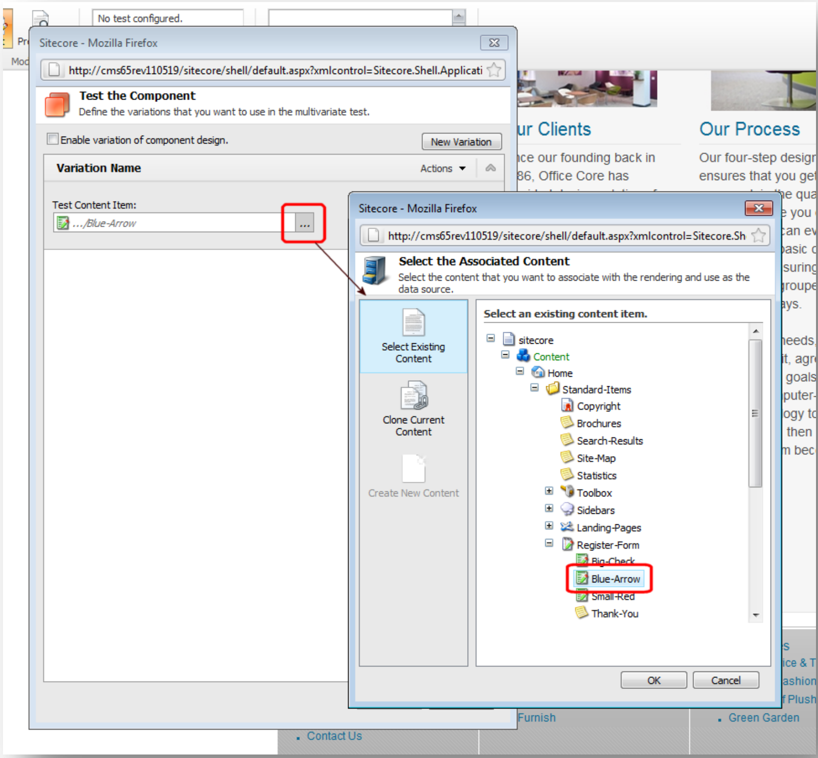
4. Click the **Test** button to open the **Test the Component** dialog box.



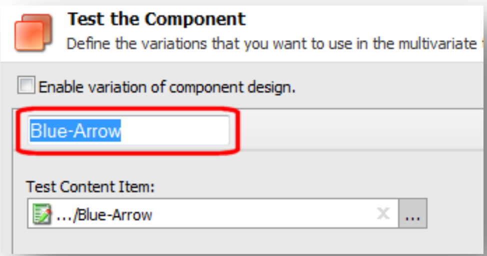
5. In the **Test the Component** dialog box, click **New Variation** to create a new test variation variable.



6. Browse the Sitecore content tree for test content items. Follow the same procedure for each of the components that you want to add to the test.



7. Browsing for existing content is just one of the options you have here.
8. Other options:
    - Browse for content in the content tree.
    - Change the component in the test, if you first select the *Enable variation of component design* check box.
    - Hide the component.
9. In this example, we select three variations of the *Register Form* control from the Standard Items folder.
10. Enter a name for each test variable that you add. For example, *Blue-Arrow*.



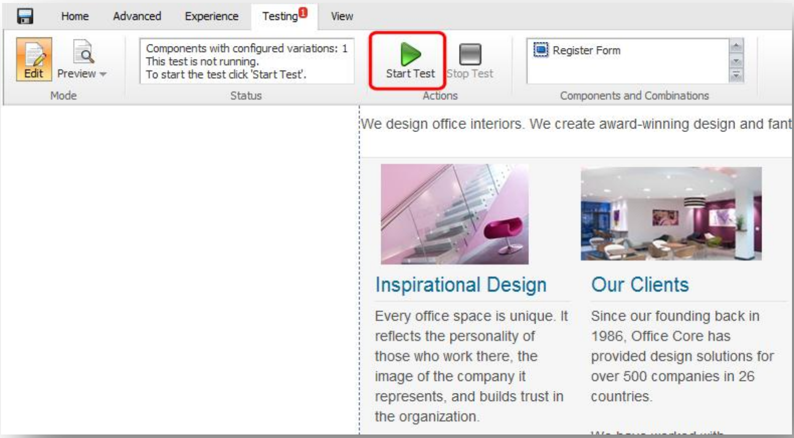
11. In the **Test the Component** dialog box, when you have added all your test variable variations, click **OK**.

5.2.2 Running an MV Test in the Page Editor

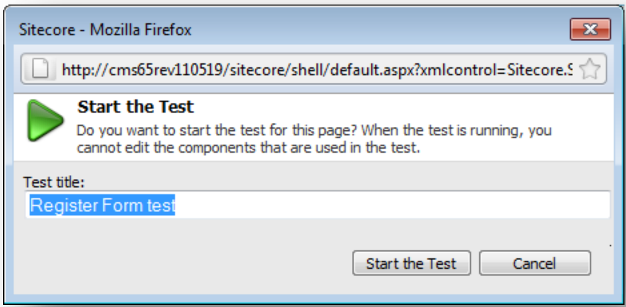
In the Page Editor, after you click Start Test, it is not possible to make any modifications to the test. For example, you cannot add or edit variations or edit the components that you are using in the test. If the components in your test contain personalization, this will be paused while the test is running.

To run a multivariate test in the Page Editor:

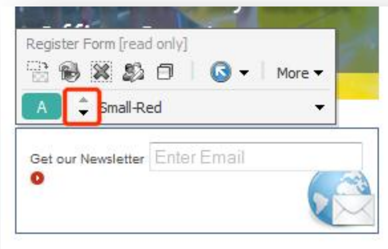
1. On the ribbon, click the **Testing** tab and then click **Start Test**.



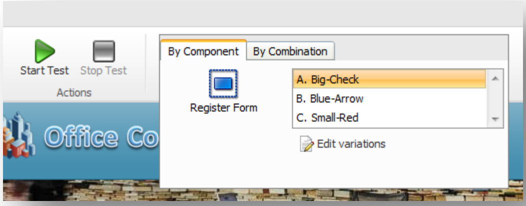
2. When you click **Start Test**, you must also enter a name for the test.



3. Click **Start the Test**.
4. In the **Page Editor**, you can preview each of your test variables before you run the test. Use the arrow to preview each test control.



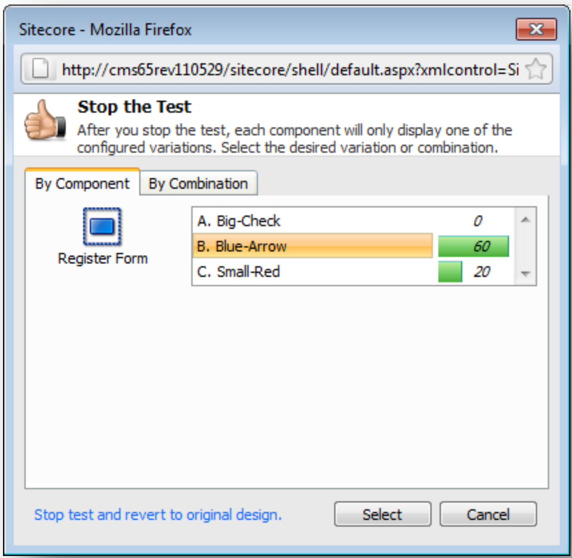
5. You can also use the gallery on the ribbon to select variations and get an overview of all the components in your test.



6. Run the test in a new browser window. After running the test for the required amount of time, on the ribbon, click **Stop Test**.
7. In the **Stop the Test** window, you can view all the components in your test and each possible combination. Decide which component or combination is the most successful and select a winner.

Note
You can add more than one component to a multivariate test so that you can decide which combination of controls works best on a page. For instructions on setting up multiple combinations of controls, see the next section.

8. In Engagement Analytics, goals enable site visitors to accumulate value. You can decide which variation of test variables is the most successful by the value it has accumulated during the test. The variation with the highest engagement value is the winner.
9. In the **Stop the Test** window, choose a winning test variation variable and click **Select**.



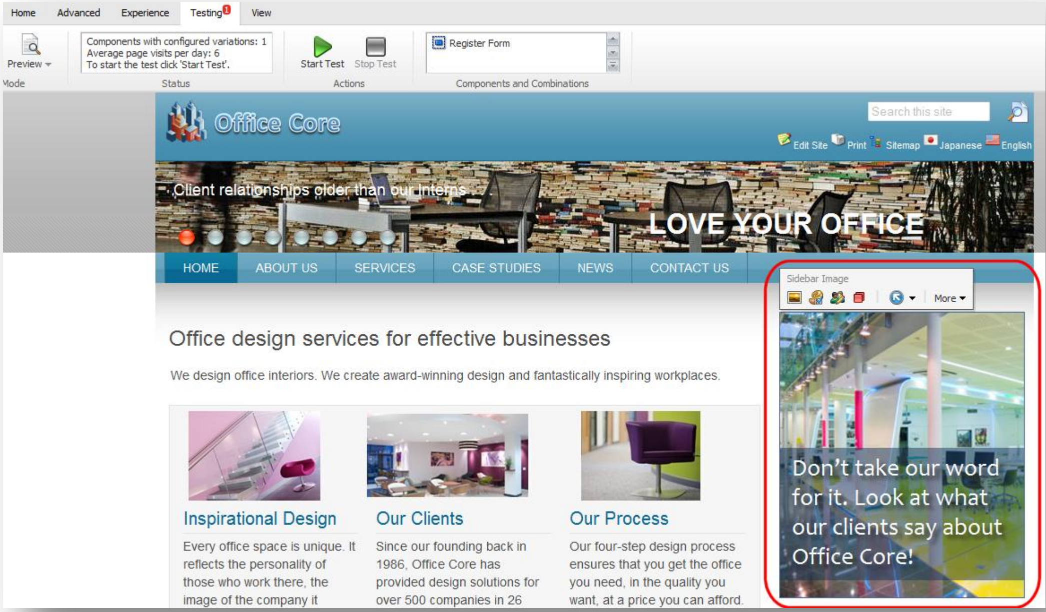
10. The variation variable that you select stays on the page as your chosen content. The test is complete and the **Testing** group no longer shows any pending tests.

5.2.3 Testing Combinations of Content in the Page Editor

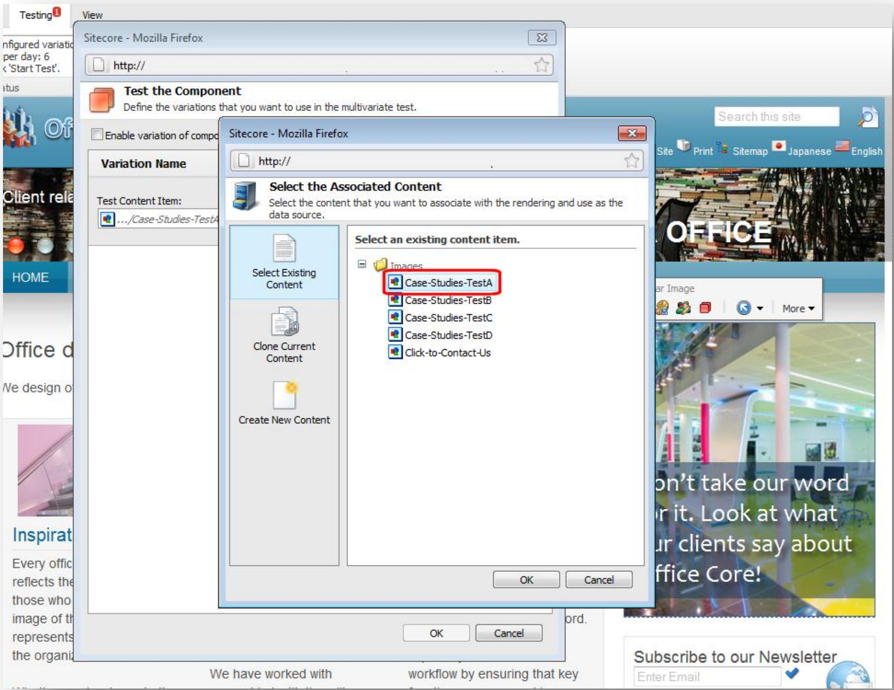
How to test different combinations of components:

1. Repeat the steps you followed in the previous section to set up the *Register Form* control.

2. Select a different control on the same page of the website. For example, *Sidebar Image*.

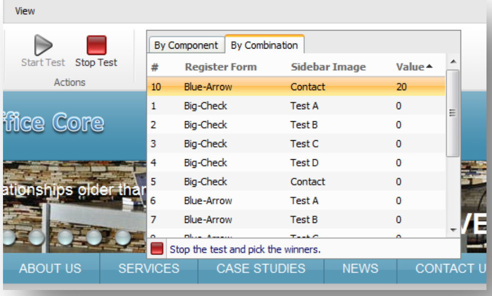


3. In the **Test the Component** dialog box, add several test variation variables following the same steps as described in the previous section. For example, choose several different sidebar images to appear in the *Sidebar Image* control.



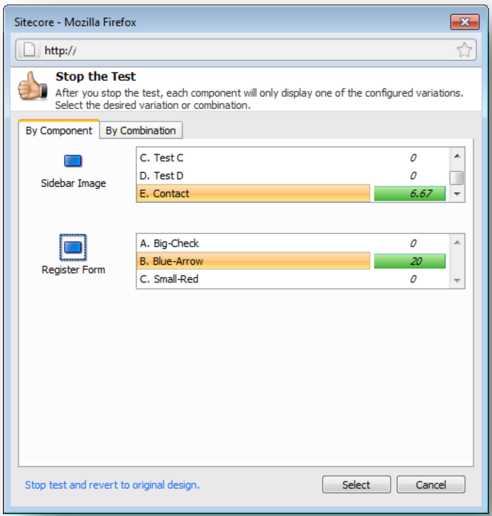
4. Save your changes.
5. On the **Page Editor** ribbon, **Testing** tab, click **Start Test** to run the test.

6. On the **Testing** tab, in the **Components and Combinations** group, if you click the drop-down, you can view all the possible combinations in the test.



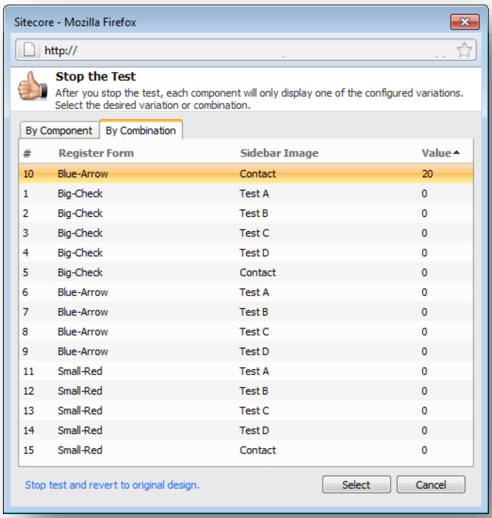
7. When you have run the test for long enough, click **Stop Test**.
8. In the **Stop the Test** dialog box, there are two tabs that present you with two different ways to evaluate the test.

   By Component – Choose the winning components for each control and then click **Select**.



Or

By Combination – Choose the winning combination of controls and then click **Select**.



Engagement Value = Value per visit

Every goal on the website has a numerical value. When a visitor accesses an mv test control that has a goal associated with it, the content accumulates a score for the visit, depending on how many visitors have accessed this content.

You can see by studying the engagement values recorded for each component or combination of components which content generates the highest value. The differences in engagement value recorded in the test results show how you can affect visitor behavior by subtle variations in the content on a page.

5.2.4 Cloning Content Items for MV Tests

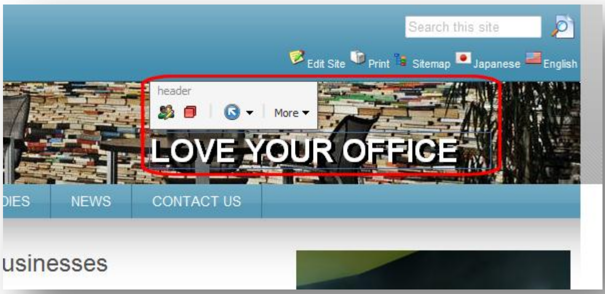
When you use the Page Editor to set up an MV test you can use existing content, clone content or create new content items to use as test variable variations. This means that you do not need to ask a developer to help you to create special content to use in your MV tests.

In this section, you test the text in the rotating Flash banner slogan from the header of the Office Core website. Test two alternative slogans; ‘*Compelling Web solutions*’ and *Free Web solutions*’ to find out which is the most effective.

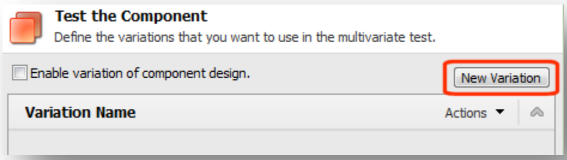
How to clone Sitecore content for MV Tests using the Page Editor:

1. In the Sitecore Desktop, open the Page Editor.
2. In the **Page Editor**, select the **Testing** tab.

3. On the *Home* page of the Office Core website, click in the text that appears in the Office Core header.



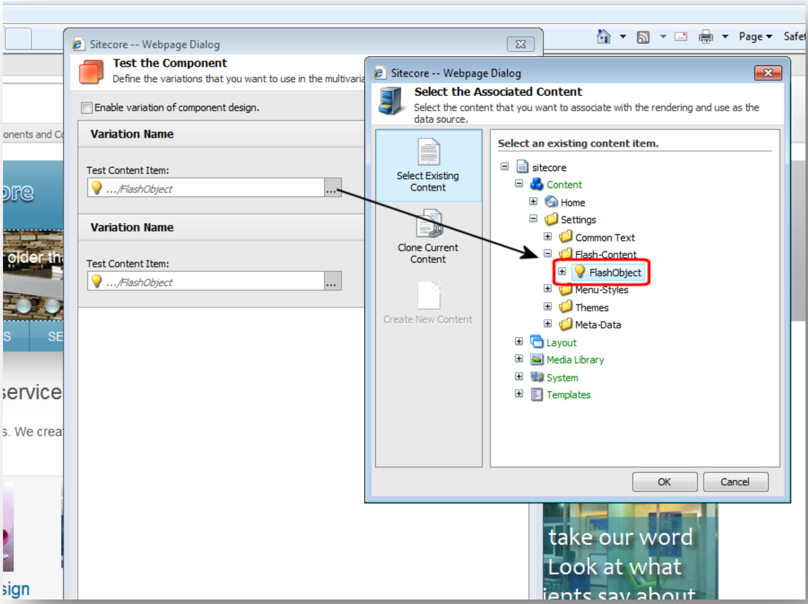
4. In the floating toolbar, click the **Test** button to open the **Test the Component** dialog box.
5. In the **Test the Component** dialog box, click **New Variation** to add a new test variation.



6. Add two test variations and give them the following names:

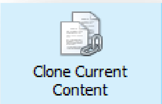
Content Item	Variation Name
Flash-Test-Slogan-1	*Free Web Solutions*
Flash-Test-Slogan-2	*Compelling Web Solutions*

7. Select the first variation and browse for a content item. Notice that the Flash object used in the Office Core header is already selected.



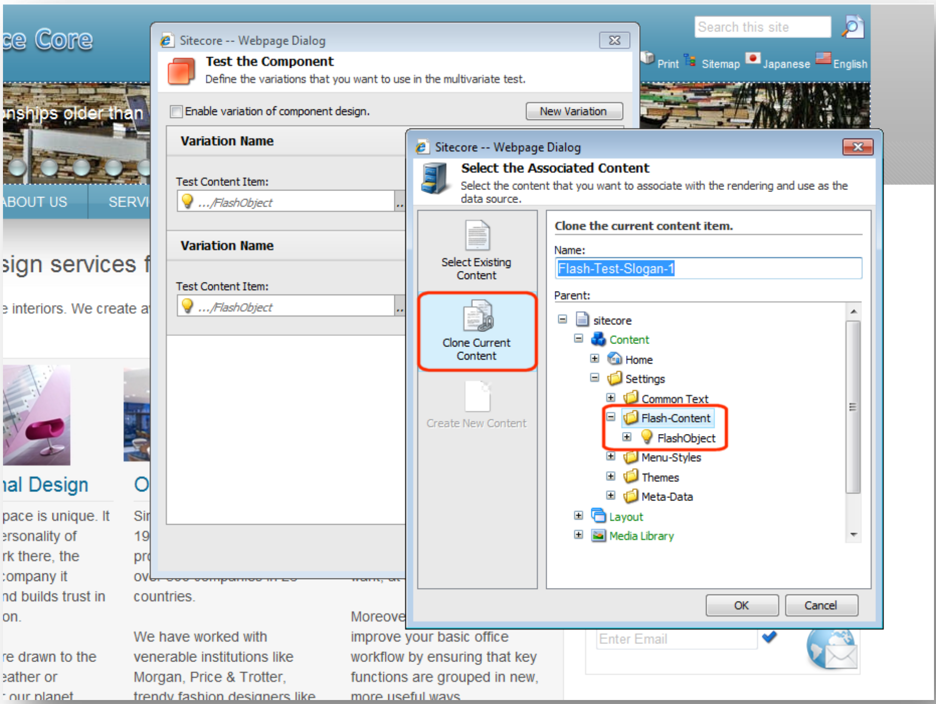
8. Create a clone from the *Flash Object* content item.

   Select *FlashObject* and click **Clone Current Content**.

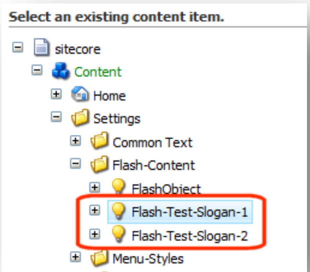


9. Make two clones and give them the following names:
   - *Flash-Test-Slogan-1*
   - *Flash-Test-Slogan-2*

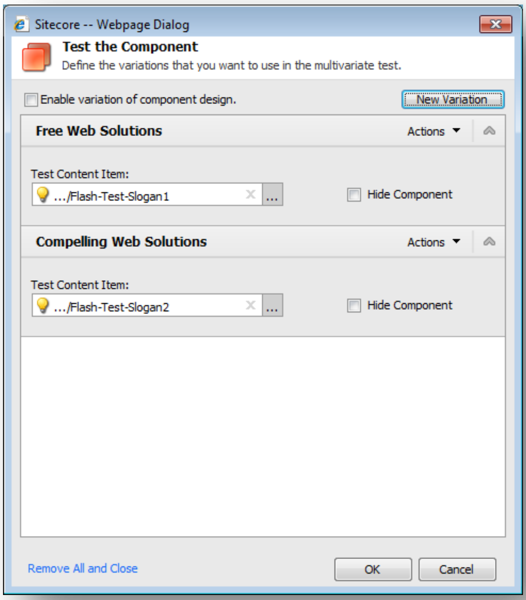
10. Save the clones under the *Flash Content* folder.



11. You now have three Flash objects in the content tree.



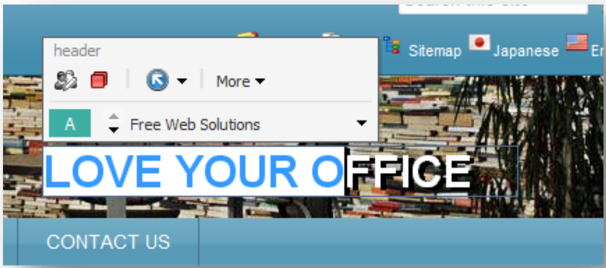
12. In the **Test the Component** dialog box, you have two variations for your test using clones of the original Flash object.



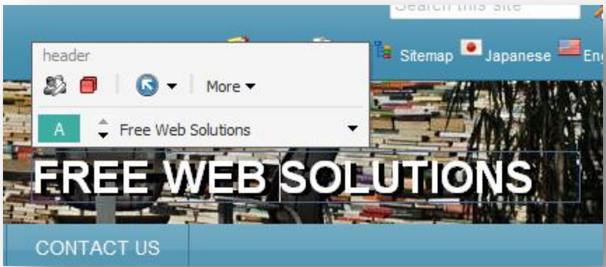
13. To save your changes, click **OK**.

Now add the text that you want to appear on the website for each of the test variation variables:

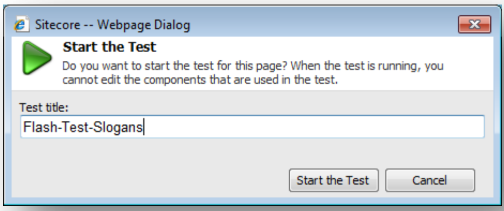
1. Select the text on the home page that you want to edit, so that the floating toolbar appears.
2. Use the *up* and *down* arrows to select each test variation variable you want to edit.



3. Click in the text and edit it in the same way as any other content on the website. Select the Free solutions variation and enter the text '*Free Web Solutions!'* To make the test very clear, you could add the same text for all the rotating banners in this Flash control.



4. Follow the same steps for the '*Compelling Web Solutions!'* slogan.
5. On the ribbon, click **Start the Test**.



Enter a name for your test, such as *Flash Test Slogans* and click **OK**.

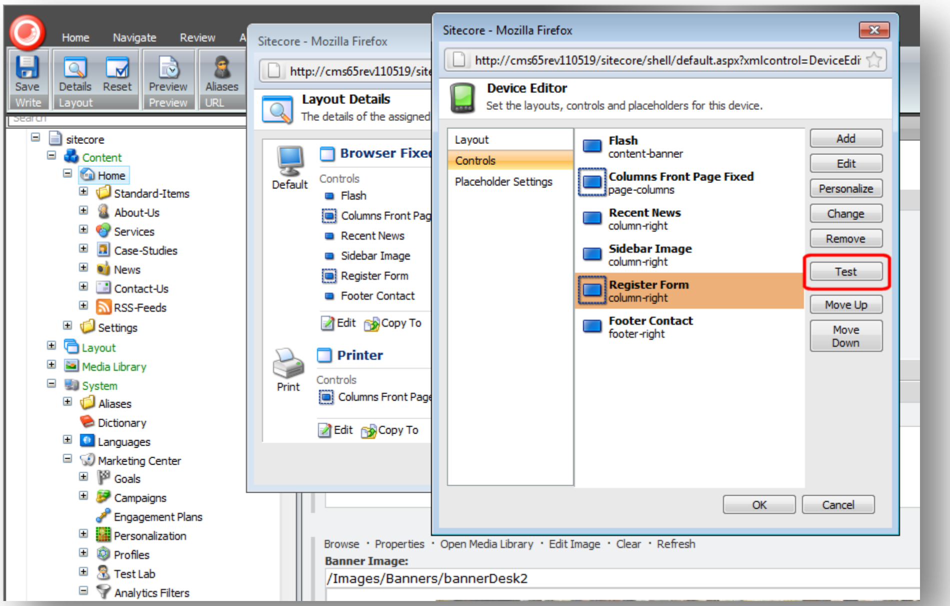
6. When you have run the test for the required amount of time select a winner in the **Stop the Test** dialog box.
7. This example demonstrates how easy it is to create your own content for MV tests without the help of the IT department.
8. To test the effectiveness of this MV test you could also assign goals to your test variable variations and measure the engagement value that these slogans generate on your website.

5.3 Creating a Multivariate Test in the Content Editor

In the following example, create a multivariate test for a newsletter register form using the Content Editor.

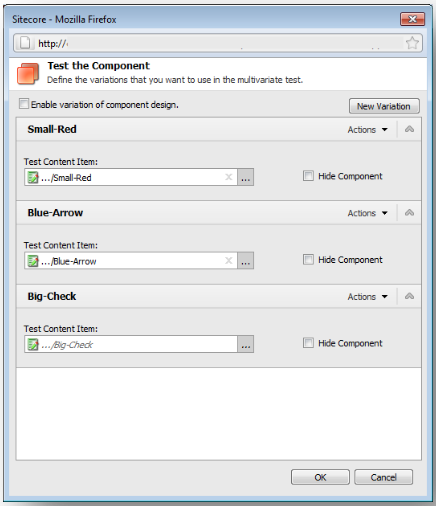
How to create a multivariate test in the Content Editor:

1. Open the Content Editor and select a content item. For example, *Home*.
2. On the ribbon, click the **Presentation** tab and then click **Layout Details**.
3. In the **Layout Details** dialog box, click **Edit**.
4. Click **Controls** and select a suitable control. For example, *Register Form*.

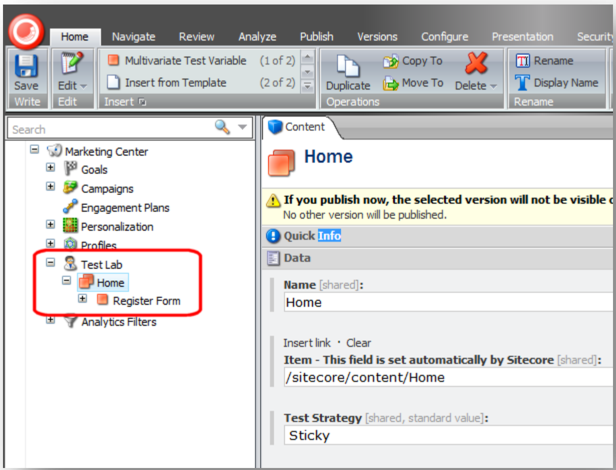


5. Click **Test**, to open the **Test the Component** dialog box.
6. Click **New Variation**, to add each of your test variation variables.

7. When you have added all your test variables click **OK**.

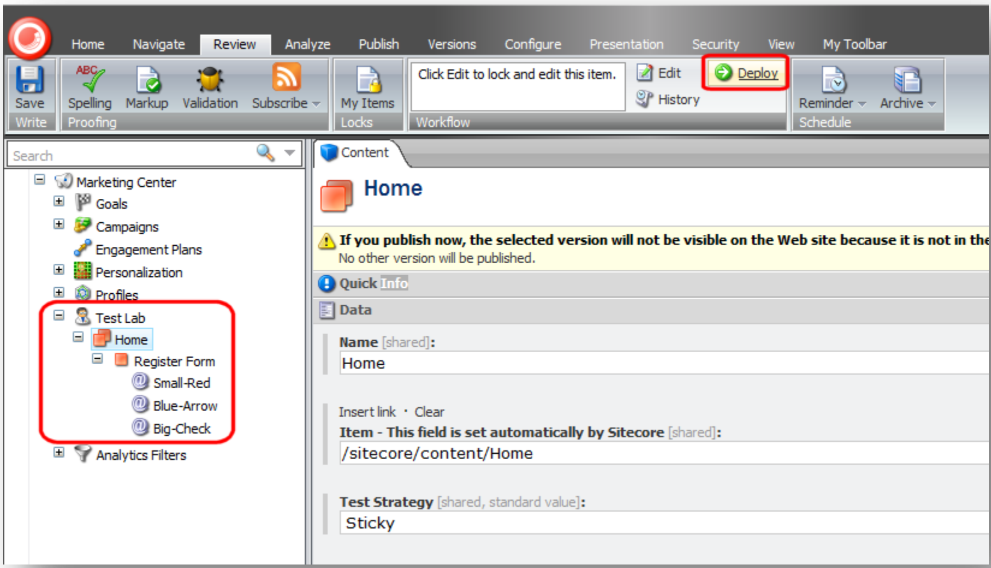


8. Open the Marketing Center.
9. In the **Marketing Center**, **Test Lab** node, select the *Home* test definition item.



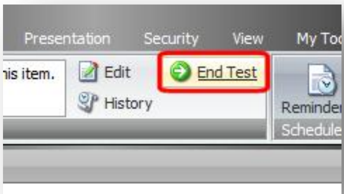
10. In the Test Lab, a test definition item and test variables are added automatically when you create test variables in the **Test the Component** dialog box.

11. On the **Review** tab, **Workflow** group, click **Deploy** to run the test.



Note
This is automatic when you create a test in the Page Editor.

1. Enter a comment, when prompted in the workflow.
2. Click **End Test** to end the test.



Note
If you create an MV test using the Content Editor you do not have access to the same statistics on Engagement Values generated when you test these controls. We recommend that, if possible, you create all MV tests using the Page Editor.

Chapter 6

Personalization

This chapter explains how to use the inline personalization functionality in the Sitecore Page Editor. This feature allows you to push predefined content at website visitors who fulfill specific conditions.

This chapter contains the following sections:

- Inline Personalization
- Creating a Personalization Rule in the Page Editor
- Creating a Personalization Rule Based on a Pattern Card
- Personalization in the Content Editor

6.1 Inline Personalization

Personalization allows you to deliver targeted content to specific site visitors. An appropriate time to implement this is after segmentation has enabled you to identify the visitors that you most want to target.

You can easily implement rules that show or hide content to site visitors based on their browsing behavior and their accumulated profile values. You can make your site respond in real-time by showing specific content, hiding content, or adjusting the behavior of a web control.

The Page Editor contains inline personalization functionality that allows you to specify the rules and conditions that must be met before personalized content is displayed. It also lets you test this functionality before you publish it on your website.

6.1.1 Pre-requisites

Before you can create a personalization rule you need the following components:

- Content items to use as the data source for the personalization rule.
- A Web control or rendering item.

6.2 Creating a Personalization Rule in the Page Editor

In the Page Editor, you can create rules to determine which content is shown to different site visitors. This is called a conditional rendering or personalization rule.

In this example, we create a rule that determines when site visitors see the Office Core brochure link.

The Office Core site, displays a brochure download link on every page, apart from the *Home* page. This rule specifies that the brochure link on the *Our Services* page is only displayed to visitors who have a lead score of 20 or more.

To implement this personalization rule, you must:

- Create a conditional rendering rule.
- Configure the behavior of the webpage.

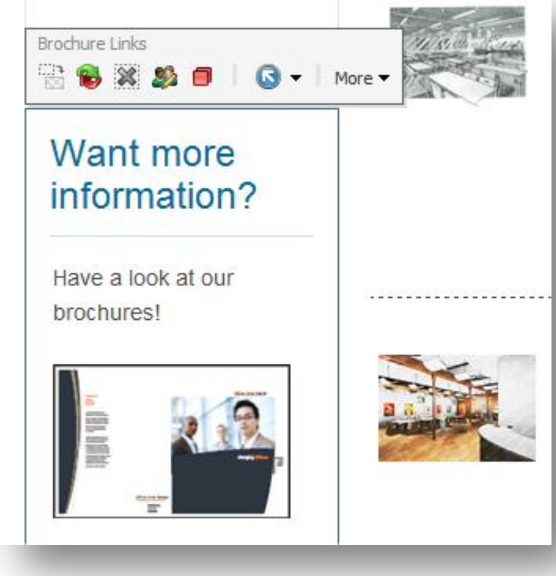
You can create personalization rules that are based on many different criteria including goals, campaigns, engagement value points, profile value points, and engagement plans.

Creating a Personalization Rule

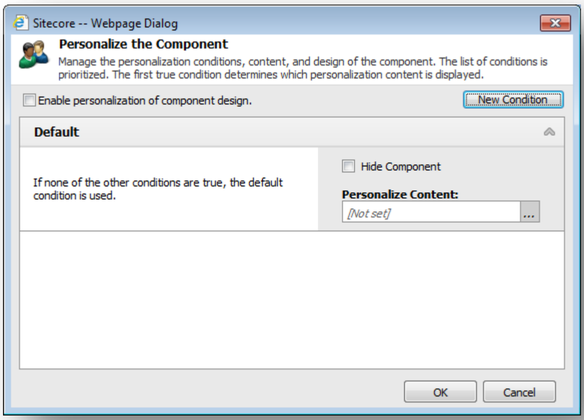
Before you can specify that specific content should be shown to visitors who fulfill certain criteria, you must create a personalization rule that contains these criteria.

To create a personalization rule:

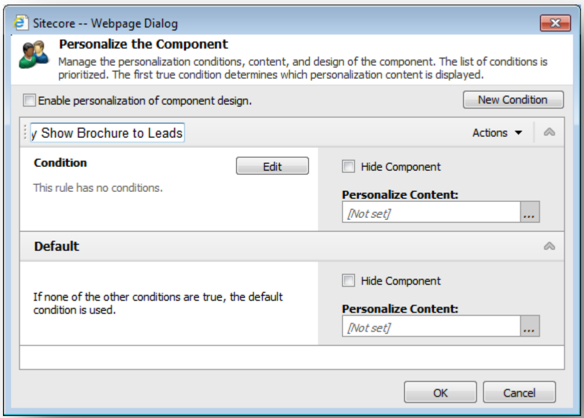
1. In the **Sitecore Desktop**, click **Sitecore** and then click **Page Editor**.
2. In the **Page Editor**, in the ribbon, click the **View** tab and in the **Enable** group, select the **Designing** check box to enable the design functionality in the **Page Editor**.
3. Navigate to the page where you want to implement the personalization rule. In this example, you want to edit the *Services* page.
4. In the sidebar, select the *Want more information* section and a floating toolbar appears.



5. In the toolbar, click the **Personalize Component** button to open the **Personalize the Component** dialog box.

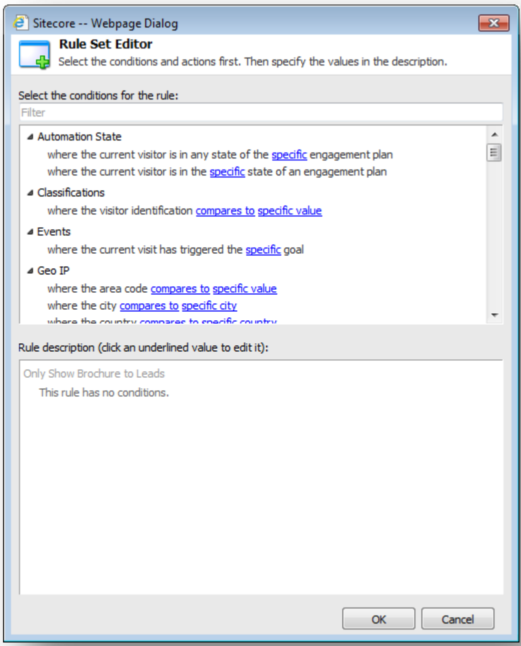


6. In the **Personalize the Component** dialog box, click **New Condition** and the dialog box displays a new condition.



7. Give the new condition an appropriate name — *Only Show Brochure to Leads*.

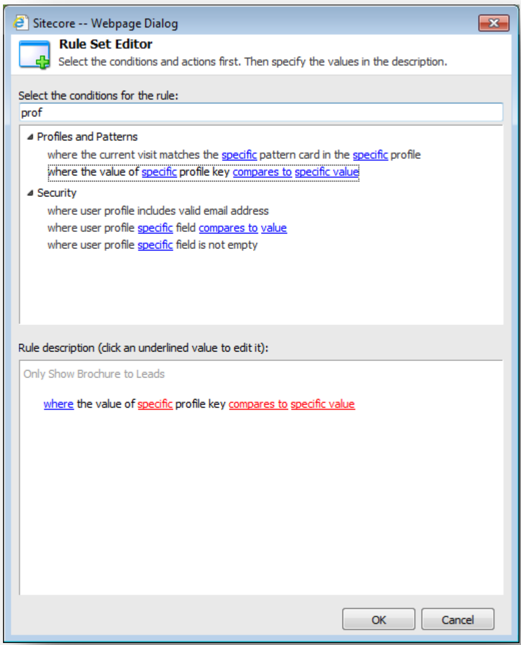
8. To define the condition for this component, click **Edit** and the **Rule Set Editor** dialog box appears.



9. In the **Select the condition for the rule** field, in the **Filter** field, enter *profile* and select the following condition:

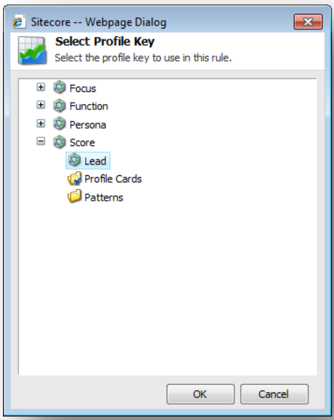
   "where the value of specific profile key compares to specific value"

   This rule is now displayed in the **Rule description** field.

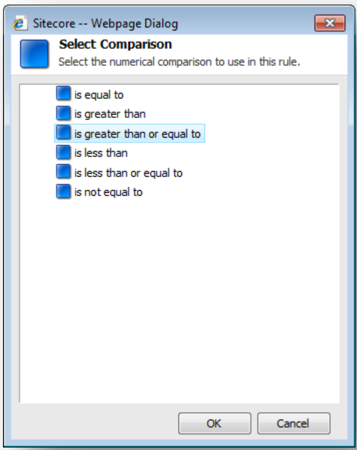


Now you must edit the values in this condition so that only visitors who have accumulated a lead score of 20 or more can see the brochure download link.

10. In the **Rule description** field, click "*specific*" to open the **Select Profile Key** dialog box.



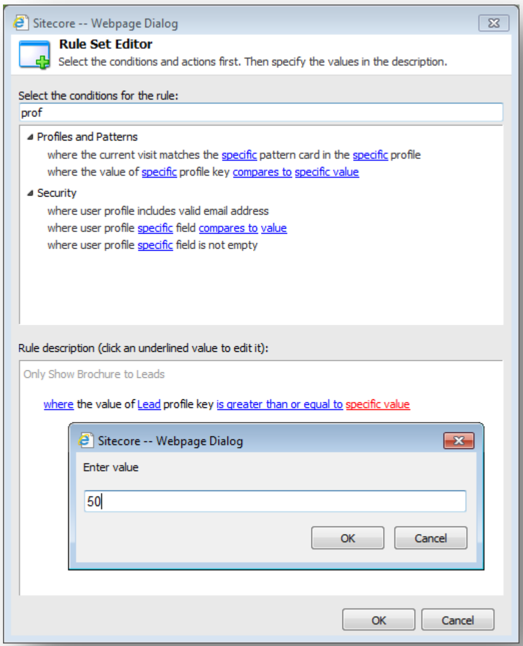
11. In the **Select Profile Key** dialog box, expand *Score* and select *Lead*.
12. In the **Rule Set Editor** dialog box, in the **Rule description** field, click "*compares to*" to select a comparison to use in this rule.
13. In the **Select Comparison** dialog box, select "*is greater than or equal to*" and click **OK**.



14. In the **Rule Set Editor** dialog box, in the **Rule description** field, click "*specific value*", to enter a numerical value.

    In this example, you want the brochure download link to be displayed on the *Our Services* page when the *Lead* profile score of the visitor is higher than 50.

15. Enter *50* and click **OK**.

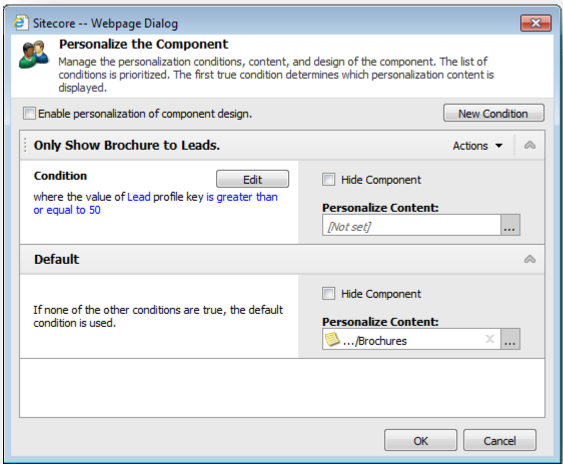


Configuring the Behavior of a Webpage

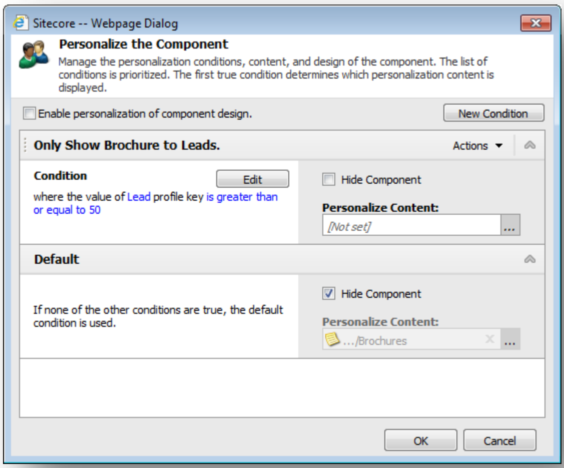
After you have defined the conditional rendering rule, you can specify the behavior or action that you want the page or component to perform when the conditions in the rule are met. You configure these actions in the **Personalize the Component** dialog box and can show or hiding particular content, as well as adjust the behavior of a web control and the way it is presented.

To configure an action for a webpage component:

1. In the **Page Editor**, click the **Personalize Component** button to open the **Personalize the Component** dialog box.



2. To specify that the website should not show this component to visitors who are not leads, in the *Default* condition, select the **Display Component** check box.



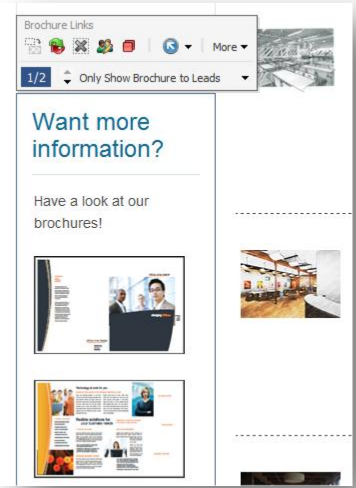
Now when a visitor comes to the *Our Services* page, they only see the download the Office Core brochure link if they have a lead score of 50 or more.

In the **Page Editor**, you can see that the floating toolbar now contains extra information about how many conditions have been defined, which one is currently selected, and the component displays the content that is specified in the current condition.

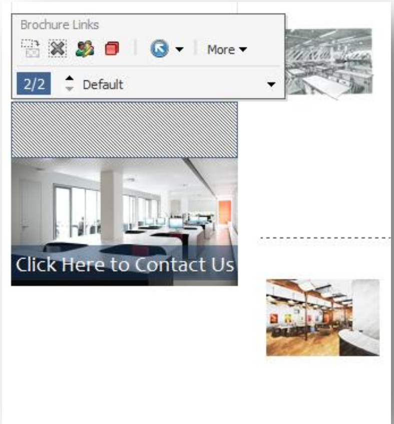
You can see how the personalization rules that you specified affect the content that is displayed in this component.

In the floating toolbar, you can scroll between the different conditions to see how they affect the component and the content it displays.

If the visitor has a lead score of 50 or more, the component displays the content about our brochure:

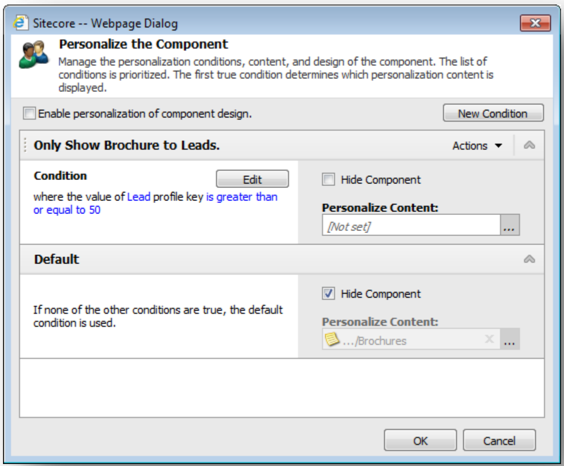


If the visitor has a lead score of less than 50, the component does not display the content about our brochure.



How Sitecore Evaluates Personalization Rules

When a visitor comes to this page, Sitecore evaluates the personalization rules in the order they appear in the **Personalize the Component** dialog box.



In this example, Sitecore evaluates the *Only Show Brochure to Leads* condition first. If the visitor satisfies the rule specified in this condition and has a lead score of 50 or more, Sitecore displays the specified content. If the visitor doesn’t satisfy the rule specified in this condition, Sitecore moves on to the next condition, and so on, until the visitor meets one of the conditions.

The default condition is used if the visitor meets none of the other conditions.

Publish the Personalization Rule

You must publish this new rule before you can use it on your website.

To publish the personalization rule:

1. In the **Marketing Center**, on the **Publish** tab, in the **Publish** group, click **Publish**, **Publish Item**.
2. In the publishing wizard, select the **Smart Publish** option.

Testing the Rule

To test that the rule works:

1. In a new browser window, open the Office Core website.
2. Navigate to the *Our Services* page.

   Notice that there is no longer a brochure displayed in the right-hand column.
3. Explore the site a little more and return to the *Our Services* page.

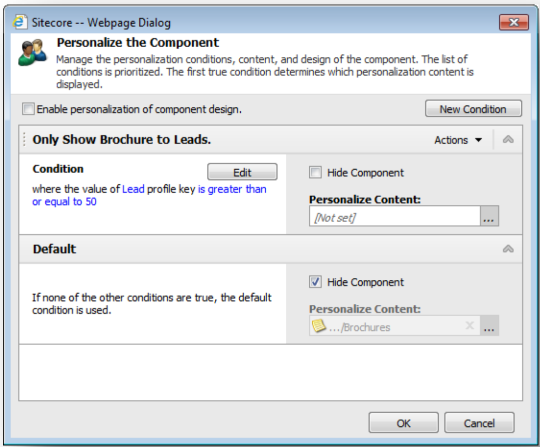
   Once you have accumulated a lead score of 50 or more, the brochure link will appear in the right-hand column.

Personalizing the Content

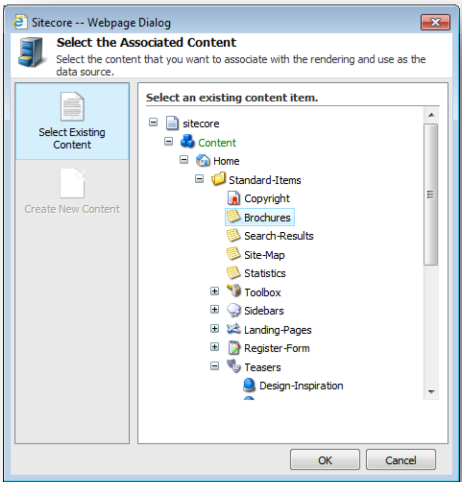
When you are setting up a personalization rule, you can also specify that the page should show some different content if the rule is satisfied. You can also specify that it should use a different design for the content it displays.

To display different content:

1. In the **Page Editor**, open the **Personalize the Component** dialog box.



2. In the **Personalize the Component** dialog box, select the rule you want to edit and in the **Personalize Content** field, click the **Browse** ... button.



3. In the **Select the Associated Content** dialog box, the **Select Existing Content** option is selected by default.

   You use this option when you select an existing content item to display instead of the current content item.

4. Navigate through the content tree and select the content item that you want to display. The content item must be compatible with the current rendering.

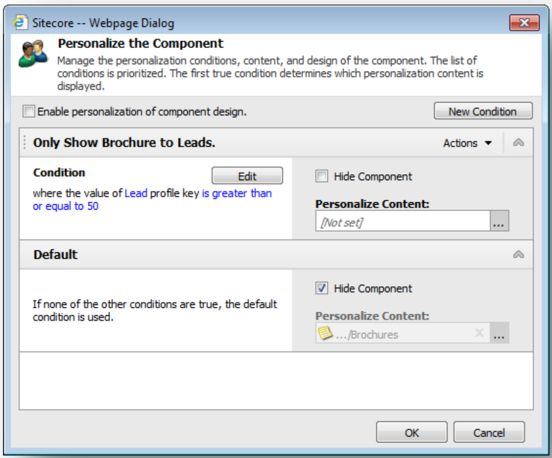
   This new item is then displayed when the rule specified in this condition is met.

Personalizing the Layout for a Component

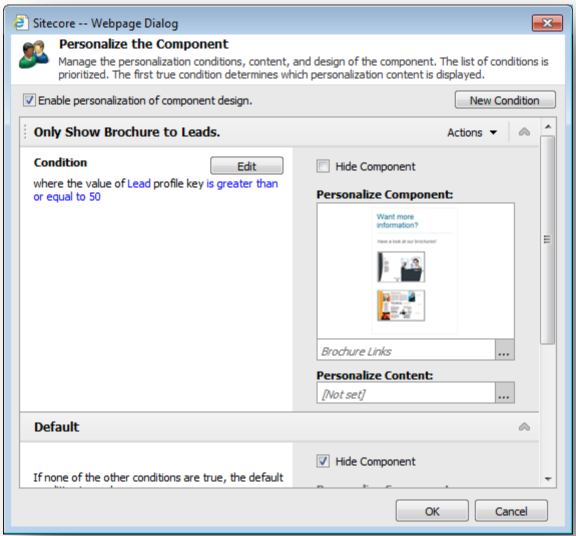
You can also personalize the way a component is displayed on a webpage.

To personalize the layout of a component:

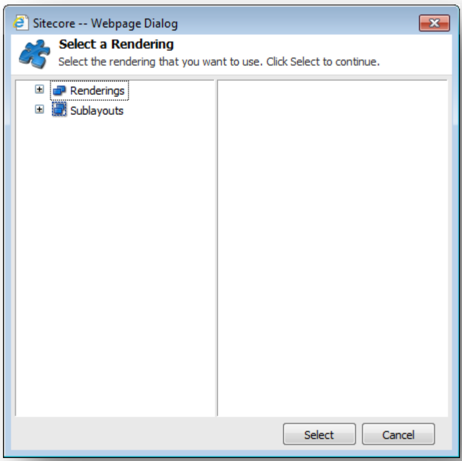
1. In the **Page Editor**, open the **Personalize the Component** dialog box.



2. In the **Personalize the Component** dialog box, select the **Enable personalization of component design** check box and the dialog box displays some more options.



3. In the **Personalize Component** field, click the **Browse** ... button.



4. In the **Select a Rendering** dialog box, select the rendering that you want to use for this content with this personalization rule.

   The rendering must be compatible with the current content item.

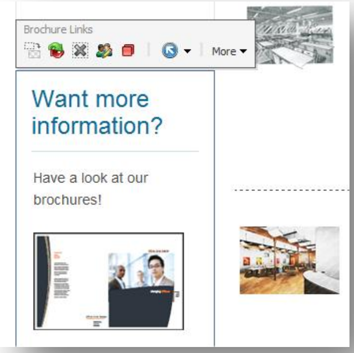
6.3 Creating a Personalization Rule Based on a Pattern Card

When you create a personalization rule or conditional rendering, you can base the rule on one or more of the pattern cards that you have created. This means that you can create personalization rules that target visitors whose interests and behavior match the market segments that you have identified and with whom you want to interact in a particular way.

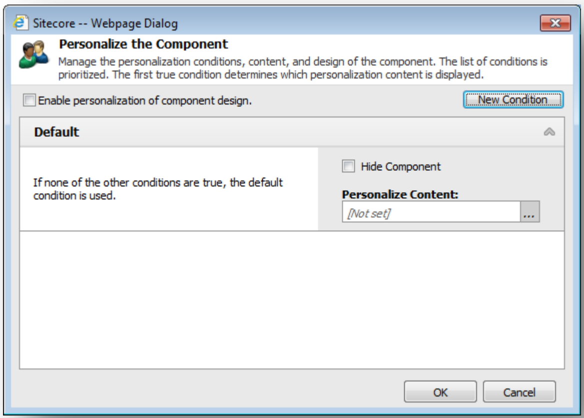
Note
The following example is based on the previous personalization example and only describes how to set up the personalization rule.

To base a personalization rule on a pattern card:

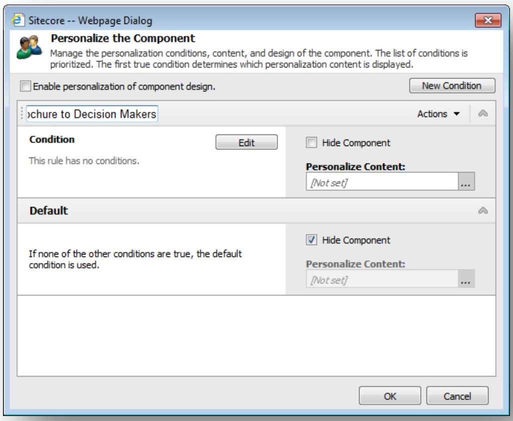
1. In the Sitecore Desktop, click **Sitecore** and then click **Page Editor**.
2. In the **Page Editor**, in the ribbon, click the **View** tab and in the **Enable** group, select the **Designing** check box to enable the design functionality in the **Page Editor**.
3. Navigate to the page where you want to implement the personalization rule. In this example, you want to edit the *Services* page.
4. In the sidebar, select the *Want more information* section and the floating toolbar appears.



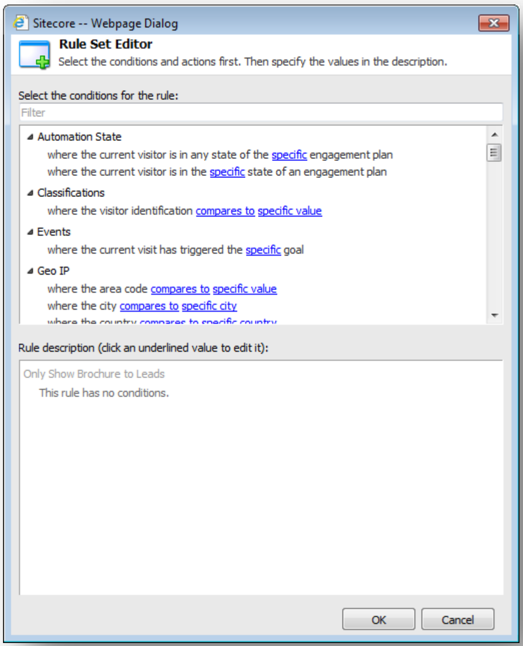
5. In the toolbar, click the **Personalize Component** button to open the **Personalize the Component** dialog box.



6. In the **Personalize the Component** dialog box, click **New Condition** and the dialog box displays a new condition.



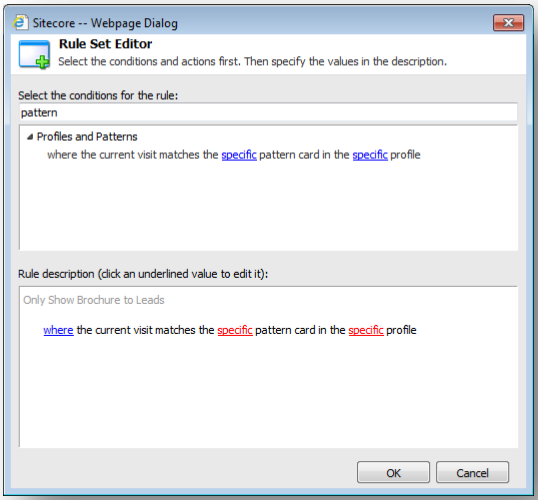
7. Give the new condition an appropriate name — *Only Show Brochure to Decision Makers*.
8. To define the condition for this component, click **Edit** and the **Rule Set Editor** dialog box appears.



9. In the **Select the condition for the rule** field, in the **Filter** field, enter *pattern* and select the following condition:

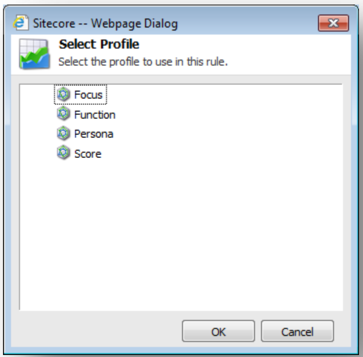
   where the current visit matches the specific pattern card in the specific profile

This rule is now displayed in the **Rule description** field.

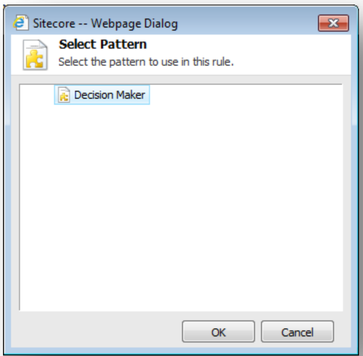


Now you must edit the values in this condition so that only visitors who are mapped to a particular pattern card can see the brochure download link.

10. In the **Rule description** field, click *specific profile* to open the **Select Profile** dialog box.



11. In the **Select Profile** dialog box, select *Focus*.
12. In the **Rule Set Editor** dialog box, in the **Rule description** field, click *specific pattern card* to open the **Select Pattern** dialog box.



In the **Select Pattern** dialog box, you can see all the pattern cards that have been created for the *Focus* profile

13. Select the *Decision Maker* pattern card and click **OK**.

You have now created a personalization rule or conditional rendering that uses a pattern card and only applies to visitors whose behavior on your website is mapped to this pattern card.

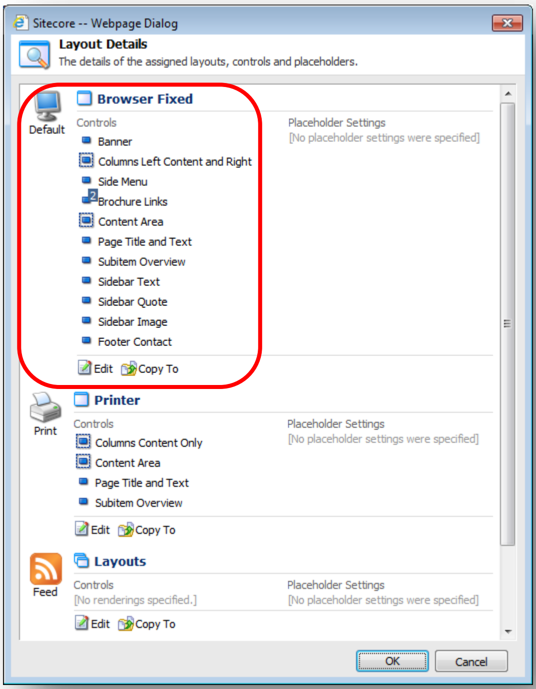
To complete the implementation of this personalization example, see the section *Creating a Personalization Rule in the Page Editor*.

6.4 Personalization in the Content Editor

You can also assign and edit personalization rules in the content editor. However, we don't consider this method to be suitable for marketers because the user interface is more developer oriented.

To view the personalization rules assigned to a content item in the Content Editor:

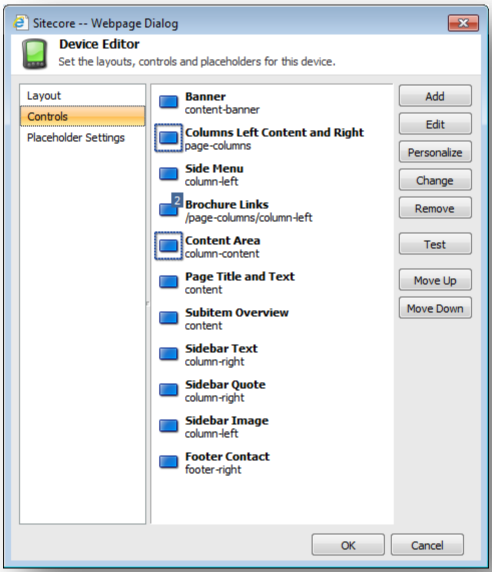
1. In the **Content Editor**, select the content item that you assigned some personalization rules to in the previous section — *Services*.
2. Click the **Presentation** tab and then in the **Layout** section, click **Details**.



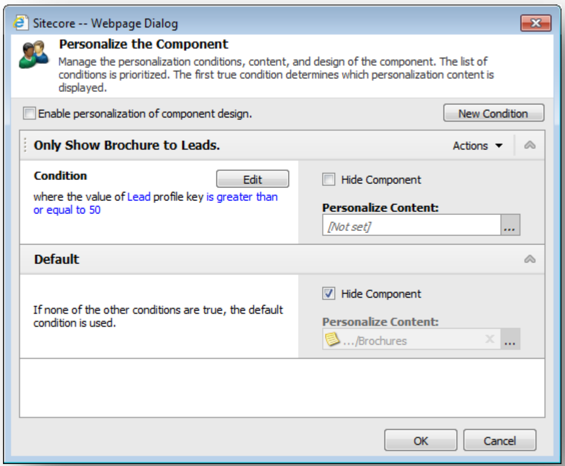
In the **Layout Details** dialog box, you can see all of the layouts, controls, and placeholders that this item uses for the different devices.

3. In the **Browser Fixed** section, you can see that the *Brochure Links* control displays a number 2. This indicates that you have defined two personalization rules for this control for this device.

4. In the **Browser Fixed** section, click **Edit** and the **Device Editor** dialog box appears.



5. In the **Device Editor** dialog box, click **Controls** and a list of controls is displayed along with a list of buttons.
6. Select the *Brochure Links* control and then click **Personalize** and the **Personalize the Component** dialog box appears.



You can now edit the personalization rules that you assigned to this component.

Chapter 7

Viewing Reports

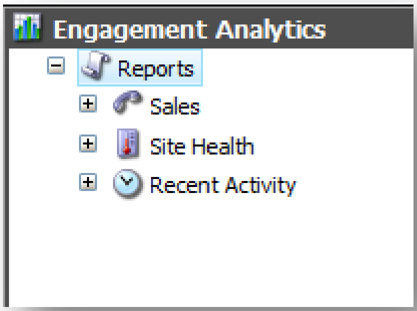
In Sitecore Engagement Analytics, reports are available in the Executive Insight Dashboard, on content items and in the Engagement Analytics report viewer. This chapter concentrates on the standard reports available in Engagement Analytics. It also explains some additional functionality built into these reports, such as how to subscribe to email updates and how to apply simple filters.

This chapter includes:

- Viewing Engagement Analytics Reports
- Classifying Site Visitors
- Subscribing to Reports
- Linking to CRM
- Saving and Filtering Reports

7.1 Viewing Engagement Analytics Reports

Engagement Analytics contains a number of standard reports that you can run out of the box. Reports are available in the following categories:



Sales

Lead reports by Activity or Value

Site Health

Slow pages, URLs not found

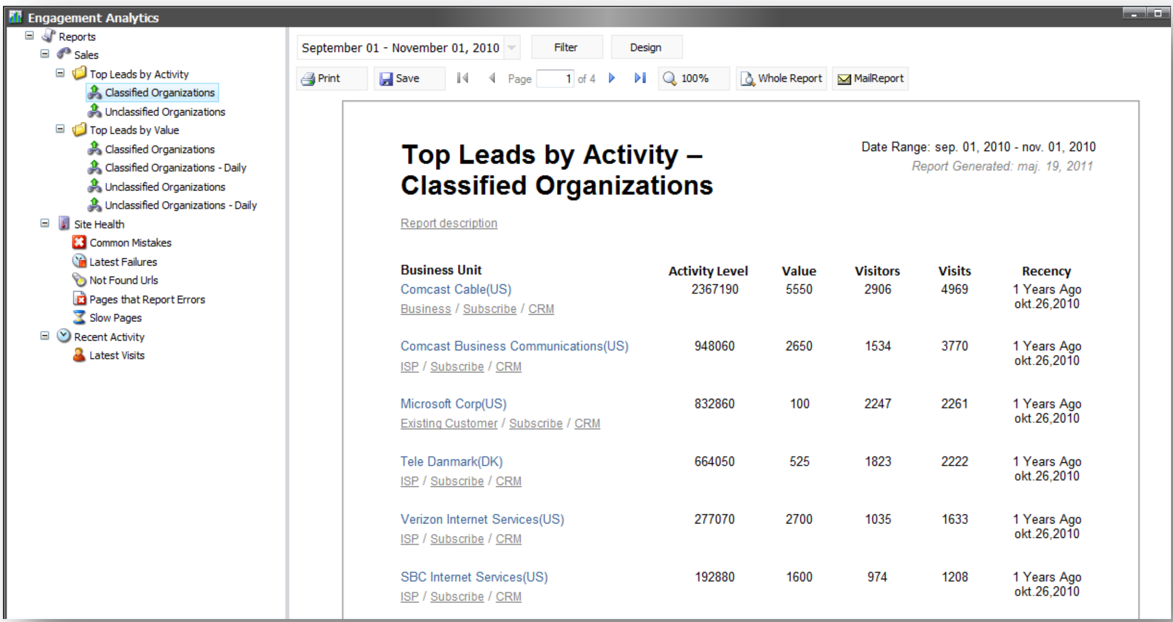
Recent Activity

Latest Visits

To open an Engagement Analytics report:

1. In the **Sitecore Desktop**, click the **Sitecore** button and then click **Engagement Analytics**.
2. In **Engagement Analytics**, click the node you want to expand, such as *Sales*, and then click on a report such as *Top Leads by Activity*, *Classified Organizations*.

The report opens in the right-hand panel of the **Engagement Analytics** window.



7.1.1 Sales

You can configure the sales area to display your own reports. For example, if you decide to record lead scores, you can display lead reports for your sales team.

You can identify your competitors here. You can create analyst and press reports in a similar way to competitor reports.

Your site administrator can help you to configure reports for this area.

Sales Reports	Description
Top Leads by Activity – Classified Organizations	Used by sales teams to identify which classified organizations have shown the highest levels of activity on the website.
Top Leads by Activity – Unclassified Organizations	Used by sales teams to identify which unclassified organizations have shown the highest levels of activity on the website.
Top Leads by Value - Classified Organizations - Daily	Used by sales teams to identify which classified organizations have accumulated the highest value visits on a single day.
Top Leads by Value - Classified Organizations - Periodic	Used by sales teams to identify which classified organizations have accumulated the highest value visits over a specific period.
Top Leads by Value - Unclassified Organizations – Daily	Used by sales teams to identify which unclassified organizations have accumulated the highest value visits on a single day.
Top Leads by Value - Unclassified Organizations - Periodic	Used by sales teams to identify which unclassified organizations have accumulated the highest value visits over a specific period.

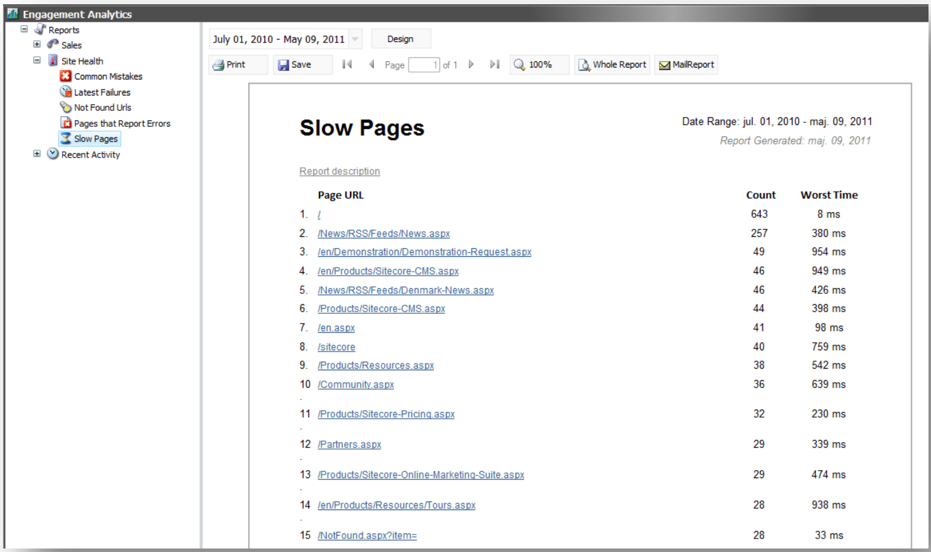
You can view a more detailed description of the business purpose of each report when you view an individual report.

7.1.2 Site Health

In Engagement Analytics, Site Health contains reports on any failures that occur on your website. Site Health Reports can help you identify potential problems with your website or on your web servers. This is useful information that could highlight potential problem areas that require further investigation.

Expand the *Site Health* node to view all the available reports.

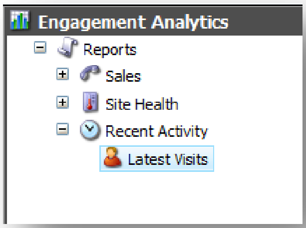
For example the *Slow Pages* report:

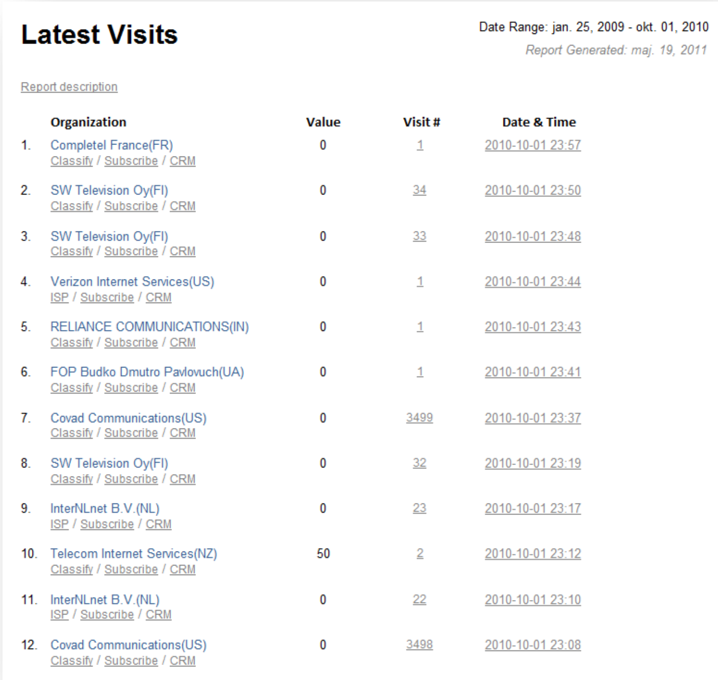


Site Health Reports	Description
Common Mistakes	List the most common mistakes that occur on the web site, such as, no search hits found, user subscription failed, login failed, and so on.
Latest Failures	Lists all the latest failures on the web site, for example, if a visitor had difficulty logging in or if a visitor performed a local search that gave 0 results.
Not Found URLs	Lists all the not found URLs. If a URL appears as *Direct*, it means that the visitor typed the address incorrectly into the browser. These are the most common not found URLs.
Pages that Report Errors	Lists all the pages that report errors.
Slow Pages	Lists all the pages that loaded slowly with the slowest listed first.

7.1.3 Recent Activity

Recent activity reports record the latest visits to your website. View the *Latest Visits* report, to see a list of all the visits to your website, in chronological order, listed by organization:





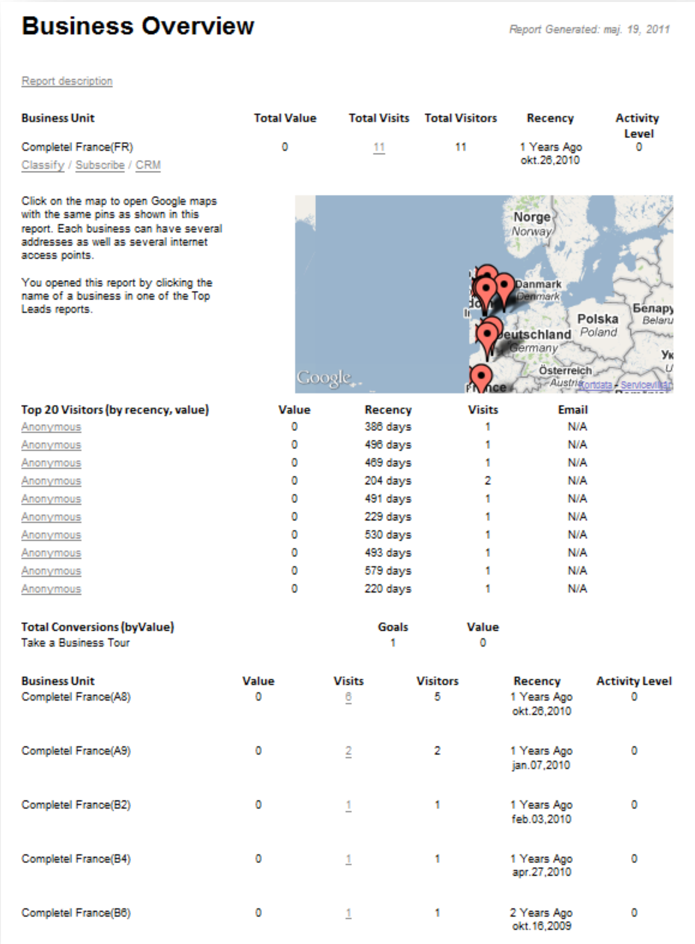
Latest Visits

Date Range: jan. 25, 2009 - okt. 01, 2010
Report Generated: maj. 19, 2011

Report description

	Organization	Value	Visit #	Date & Time
1.	Completel France(FR) Classify / Subscribe / CRM	0	1	2010-10-01 23:57
2.	SW Television Oy(FI) Classify / Subscribe / CRM	0	34	2010-10-01 23:50
3.	SW Television Oy(FI) Classify / Subscribe / CRM	0	33	2010-10-01 23:48
4.	Verizon Internet Services(US) ISP / Subscribe / CRM	0	1	2010-10-01 23:44
5.	RELIANCE COMMUNICATIONS(IN) Classify / Subscribe / CRM	0	1	2010-10-01 23:43
6.	FOP Budko Dmutro Pavlovuch(UA) Classify / Subscribe / CRM	0	1	2010-10-01 23:41
7.	Covad Communications(US) Classify / Subscribe / CRM	0	3499	2010-10-01 23:37
8.	SW Television Oy(FI) Classify / Subscribe / CRM	0	32	2010-10-01 23:19
9.	InterNLnet B.V.(NL) ISP / Subscribe / CRM	0	23	2010-10-01 23:17
10.	Telecom Internet Services(NZ) Classify / Subscribe / CRM	50	2	2010-10-01 23:12
11.	InterNLnet B.V.(NL) ISP / Subscribe / CRM	0	22	2010-10-01 23:10
12.	Covad Communications(US) Classify / Subscribe / CRM	0	3498	2010-10-01 23:08

Click on the name of an organization in the *Latest Visits* report to view the *Business Overview* report:



Business Overview

Report Generated: maj. 19, 2011

Report description

Business Unit	Total Value	Total Visits	Total Visitors	Recency	Activity Level
Completel France(FR) Classify / Subscribe / CRM	0	11	11	1 Years Ago okt.26,2010	0

Click on the map to open Google maps with the same pins as shown in this report. Each business can have several addresses as well as several internet access points.

You opened this report by clicking the name of a business in one of the Top Leads reports.

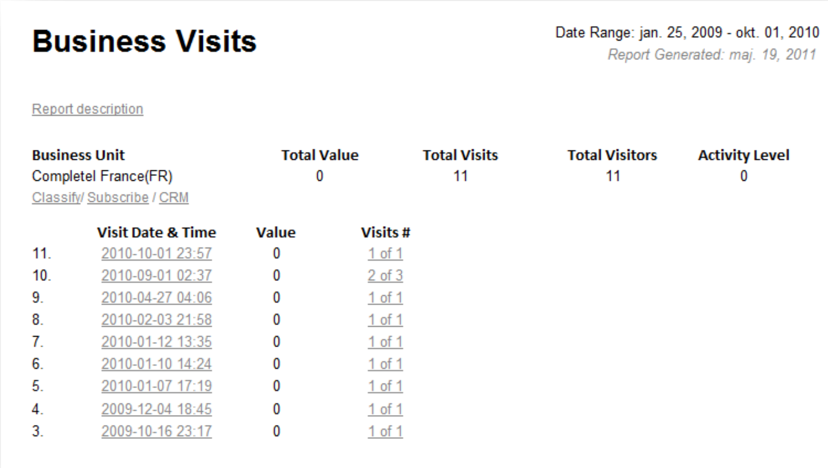
Top 20 Visitors (by recency, value)	Value	Recency	Visits	Email
Anonymous	0	386 days	1	N/A
Anonymous	0	496 days	1	N/A
Anonymous	0	469 days	1	N/A
Anonymous	0	204 days	2	N/A
Anonymous	0	491 days	1	N/A
Anonymous	0	229 days	1	N/A
Anonymous	0	530 days	1	N/A
Anonymous	0	493 days	1	N/A
Anonymous	0	579 days	1	N/A
Anonymous	0	220 days	1	N/A

Total Conversions (byValue)	Goals	Value
Take a Business Tour	1	0

Business Unit	Value	Visits	Visitors	Recency	Activity Level
Completel France(A8)	0	6	5	1 Years Ago okt.26,2010	0
Completel France(A9)	0	2	2	1 Years Ago jan.07,2010	0
Completel France(B2)	0	1	1	1 Years Ago feb.03,2010	0
Completel France(B4)	0	1	1	1 Years Ago apr.27,2010	0
Completel France(B6)	0	1	1	2 Years Ago okt.16,2009	0

The *Business Overview* report shows more detail. It displays a map of the business location and statistics such as total value accumulated during all visits and the number of visits for the organization.

Click on the number of visits displayed under *Total Visits* to view the *Business Visits* report:



Business Visits

Date Range: jan. 25, 2009 - okt. 01, 2010
Report Generated: maj. 19, 2011

Report description

Business Unit	Total Value	Total Visits	Total Visitors	Activity Level
Completel France(FR)	0	11	11	0

Classify/ Subscribe / CRM

	Visit Date & Time	Value	Visits #
11.	2010-10-01 23:57	0	1 of 1
10.	2010-09-01 02:37	0	2 of 3
9.	2010-04-27 04:06	0	1 of 1
8.	2010-02-03 21:58	0	1 of 1
7.	2010-01-12 13:35	0	1 of 1
6.	2010-01-10 14:24	0	1 of 1
5.	2010-01-07 17:19	0	1 of 1
4.	2009-12-04 18:45	0	1 of 1
3.	2009-10-16 23:17	0	1 of 1

The *Business Visits* report displays a chronological list of all visits made by the organization. Click on a single visit timestamp, to display the *Visit detail (Session)* report.

The *Visit Detail (Session)* report displays all the details of a single visit. Click on the report description to get a more details description of the business purpose of this report.

Visit Detail (Session)

Report Generated: maj. 19, 2011

Report description

Visitor	Location	Business Name	Company
Anonymous	US(MA),Worcester	allegromicro.com	N/A

Referred From:
Search Term:
ISP: Verizon Business

Visit Value	Visit # of Total	Visit Pages	Visit Duration
0	1/1	7	4 min. 8sec.

Session started jul. 23, 2010 at 13:38

#	Duration	Page
1.	54 sec.	/en/Products/Sitecore-CMS.aspx
2.	54 sec.	/Products.aspx
3.	54 sec.	/Customers/Case-Studies/Green-Mountain-Coffee-Roasters.aspx

Summary of information contained in the *Visit Detail (Session)* report:

Visit Details	Description
Visitor	Visitor company or organization.
Location	Visitor country and city of origin (based on IP address).
Business Name	Business name of website address.
Company	Company name.
Referred From	Web site where search originated, for example Google.com.
Search Term	Search engine, search term used to find the website.
ISP	Name of Internet Service Provider.
Visit Value	Total value accumulated during this visit.
Visit # of Total	The number of the visit in relation to the total number of visits.

Visit Details	Description
Visit Pages	The number of pages viewed on the site during this visit.
Visit Duration	Amount of time the visitor spent on this page.
Profile values	Charts displaying profile scores for each profile key accumulated during this visit.
Date/time	Date stamp of visit.
#	Sequential number of visit.
Duration	The amount of time spent on this specific page during the visit.
Page	All the web pages viewed during this site visit and hyperlinks that link back to the actual web pages. Each URL on the list has a timing associated with it.

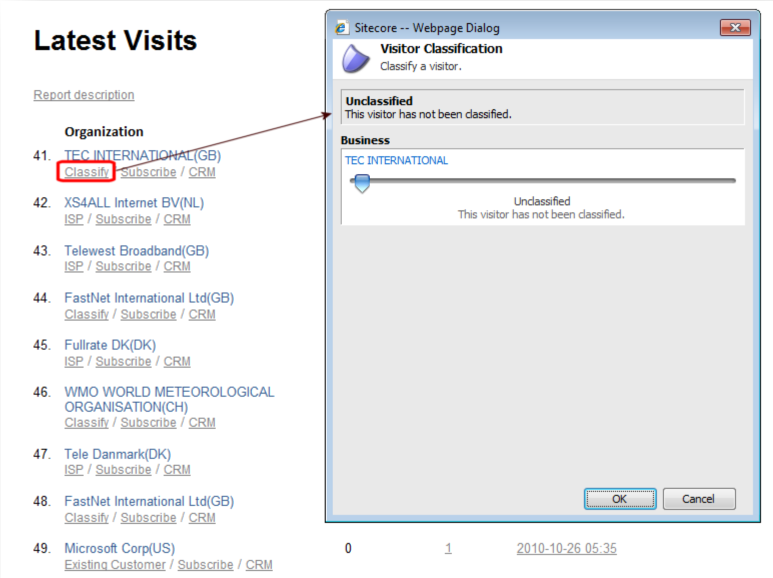
7.2 Classifying Site Visitors

Engagement Analytics lets you classify the visitors that come to your website. You can classify visitors as coming from your own company, as competitors, as robots, and so on. You can use these classifications to filter your statistics thereby improving their quality, and ultimately improving your visitor segmentation.

We recommend that you classify site visitors early and often to make your site statistics more meaningful. Classifying visitors benefits your organization, helps enable your sales force, and makes the task of personalizing content easier.

To classify a site visitor:

1. Open **Engagement Analytics**.
2. Expand *Recent Activity* and then click the *Latest Visits* report.
3. Select a visitor session that is unclassified.
4. Click **Classify** to open the **Visitor Classification** dialog box.



5. In the **Visitor Classification** dialog box, use the sliders to select appropriate values.

   In the Office Core website we have defined the following values:

Attribute	Description of values
Business, IP Address, DNS, This Visitor	Select one of the following values: • Unidentified • Business • ISP • Existing Customer • Analyst • Press • Supplier • Business Partner • Competitor • My Company

Attribute	Description of values
	• Bot – Feed Reader • Bot – Search Engine • Bot – Unidentified • Bot – Auto-detected • Bot - Malicious
User Agent	Select one of the following values: • Bot – Feed Reader • Bot – Search Engine • Bot – Unidentified • Bot – Auto-detected • Bot - Malicious

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

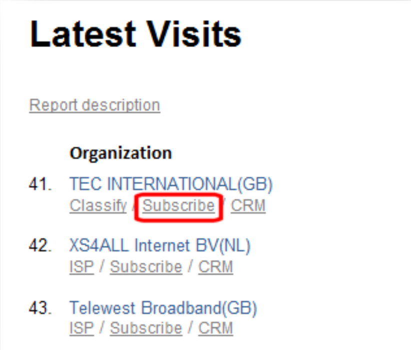
Note
The attributes and values in this section that illustrate the concept of classification come from the Office Core website.

7.3 Subscribing to Reports

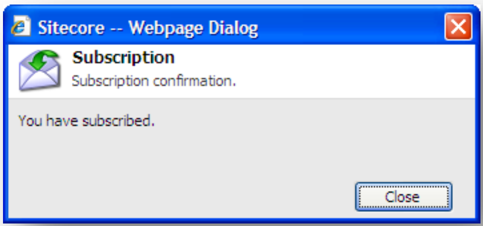
You can subscribe to reports that are of special interest to you. For example, if you subscribe to a report for a specific site visitor, Sitecore sends you a report every time this visitor returns to your website.

To subscribe to a report:

1. Open **Engagement Analytics**.
2. Open the report that you want to subscribe to.
3. Click **Subscribe**.



Sitecore already has your e-mail address as part of your Sitecore user information. When you have subscribed to a report, Sitecore displays the following message:



7.4 Linking to CRM

You can also link Sitecore reports with your CRM system.

If you click on CRM, Engagement Analytics displays the following message:

CRM Integration Page - not yet implemented

However, the way in which this link works depends on how you have implemented CRM integration on your website.

For more information about CRM integration, contact your website administrator.

7.5 Saving and Filtering Reports

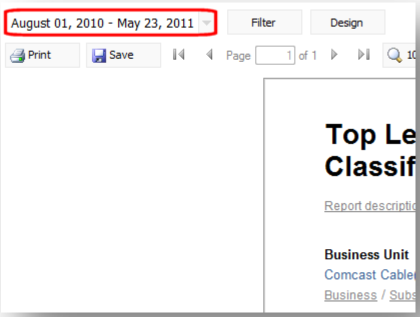
There are various ways in which you can improve the relevance of Sitecore reports.

You can:

- Change the date range used in a report.
- Save a report.
- Place filters on a report.
- Print a report.

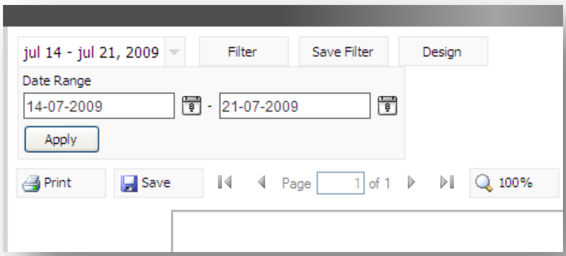
7.5.1 Selecting a Date Range

When you open a report, you can see the date range for the data in the report at the top of the Engagement Analytics report viewer.



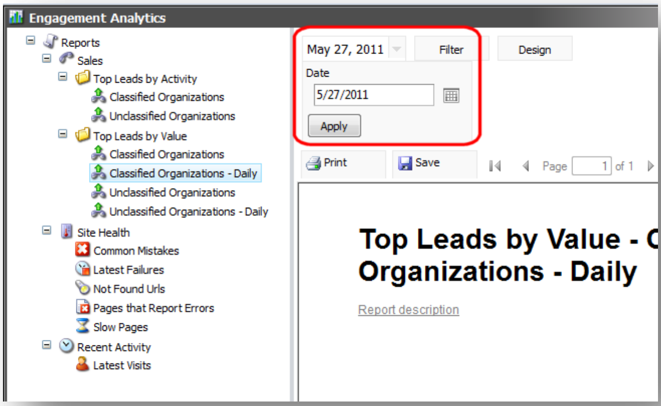
To change the date range of a report:

1. Open a report in **Engagement Analytics**.
2. Click the date at the top of the report and you see a date range filter.



3. In the **Date Range** fields, enter a start and end date directly into the date fields or alternatively click the calendar icons to select specific dates.
4. Click **Apply** to update the report and to save your date selection.

In Sales, Daily Reports, there is no data range filter only the option to select a single date.

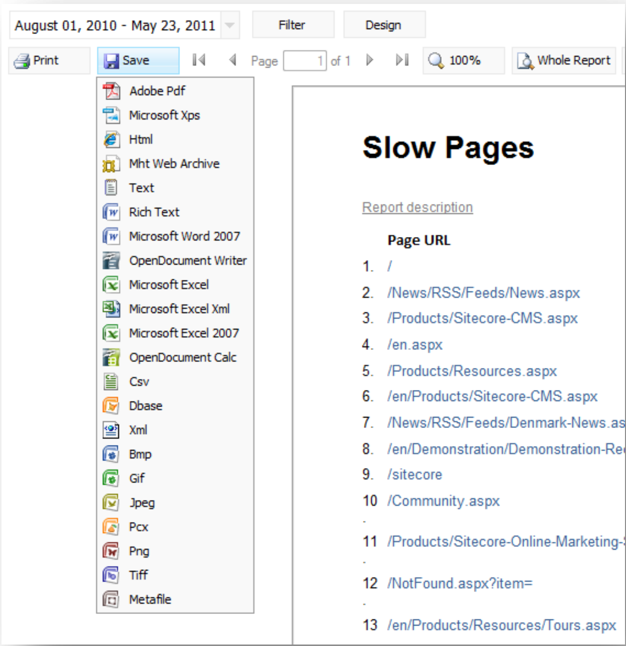


7.5.2 Saving a Report

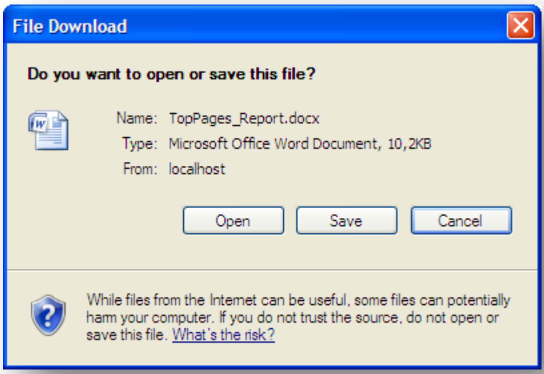
In Engagement Analytics, you can save a report in a number of different formats, such as, Word, PDF, XML, Excel, Text file format, and so on. Saving a report in this way is quick and easy.

To save a report:

1. Open **Engagement Analytics**.
2. Open a report, such as *Slow Pages*.
3. Click **Save** to see the options that are available.



4. Select a file format, for example *Microsoft Word 2007*.



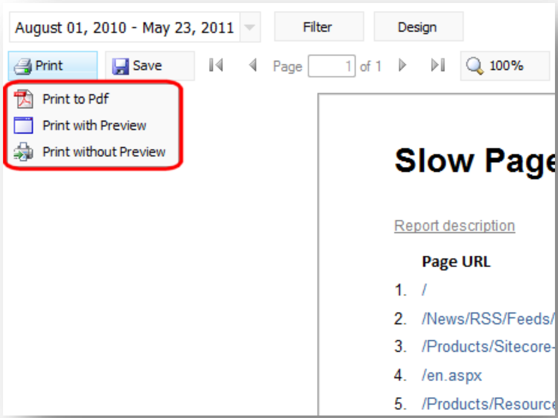
5. Open or save the report.
6. If you decide to save the report, you can store the report in a local folder.
7. Follow the same procedure to save the report in any of the other file formats.

7.5.3 Printing a Report

When you view a report in Sitecore Engagement Analytics, you can print it directly from the report viewer.

To print a report:

1. In **Engagement Analytics**, open a report, such as *Slow Pages*.
2. Click **Print**.
3. Select one of the three available print options.



Print Option	Description
Print to PDF	Preview the report as a PDF document in Adobe Reader or save it as a PDF file.
Print with Preview	Previews the report in Internet Explorer print format. In Internet Explorer, click File, Print to print the report.
Print without Preview	Displays the **Print** dialog box

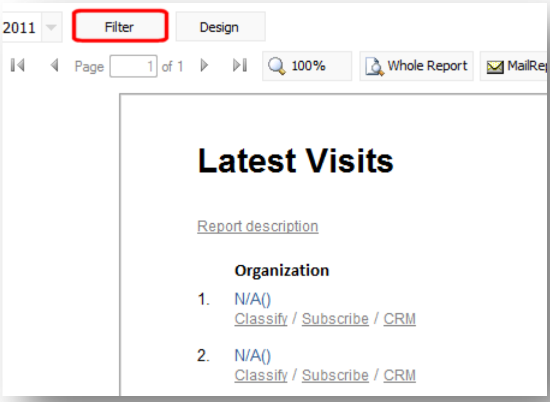
4. In the **Print** dialog box, click **Print**.

7.5.4 Filtering a Report

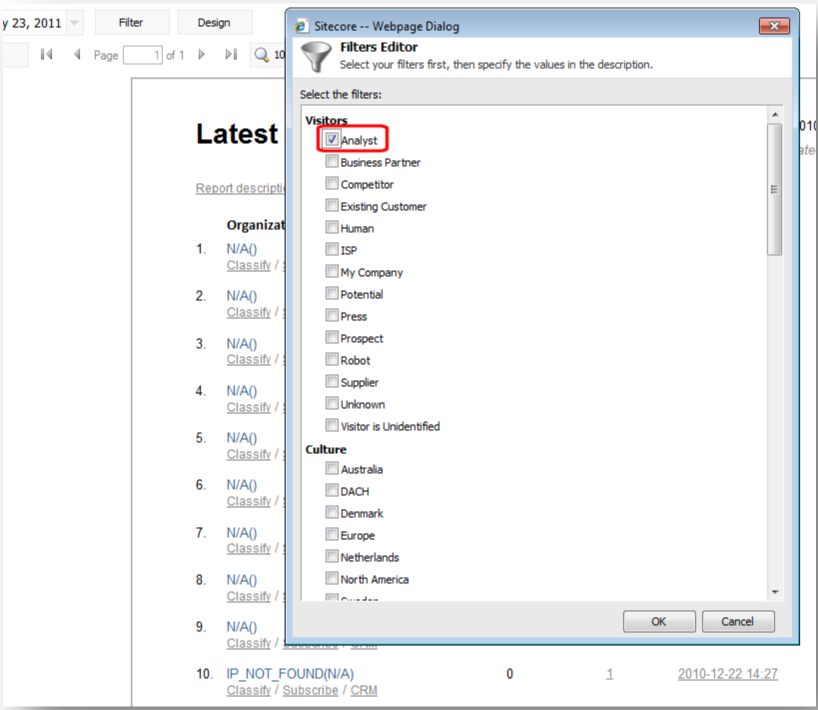
In Engagement Analytics, you can filter any report to change the data that it contains.

To filter a report:

1. In **Engagement Analytics**, choose a report to filter, such as *Latest Visits*.
2. In the *Latest Visits* report, click **Filter** to open the **Filters Editor** dialog box.



3. In the **Filter Editor** dialog box, select one or more a filters.



4. In this example, select the following values:

Filter	Value
Visitors	Analyst

Filter	Value
Culture	UK

5. Click **OK** and you can now see the *Latest Visits* report filtered to show all visits by analysts from the UK for the specified time period.
6. To make a separate report for this filtered version, create a duplicate report definition item and a duplicate `.mrt` file.

Note
Administrators can create new filter criteria to expand the selection available in the **Filter Editor**.

7.5.5 Filtering a Report to Segment Site Visitors

In Engagement Analytics, you can create filters to segment site visitors according to geography, profile or any other criteria. For example, you might want to create a new filter value for a specific county segment, such as Brazil.

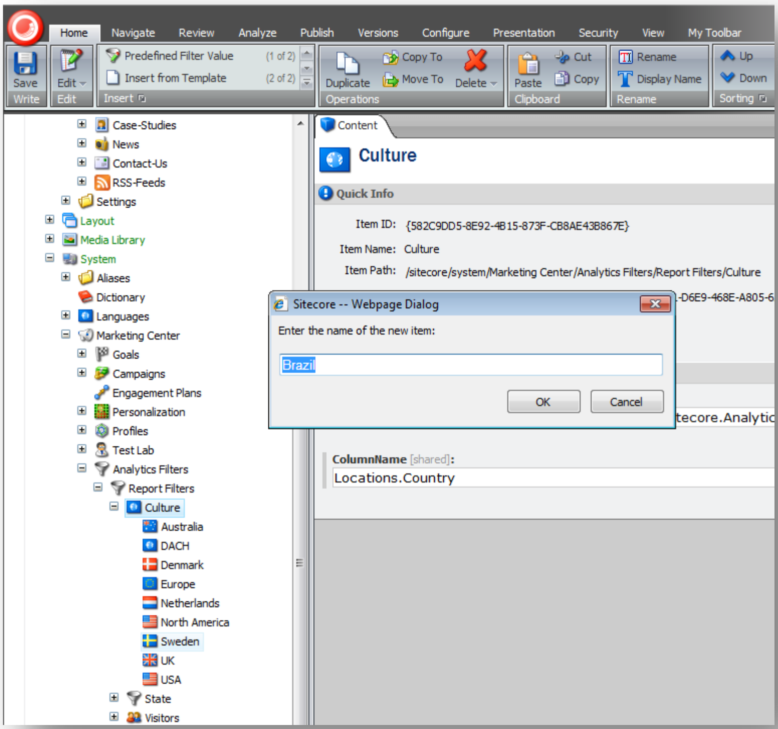
Creating a New Filter Value

To create a new filter value for Brazil:

1. Open the **Marketing Center** and in the content tree, navigate to:

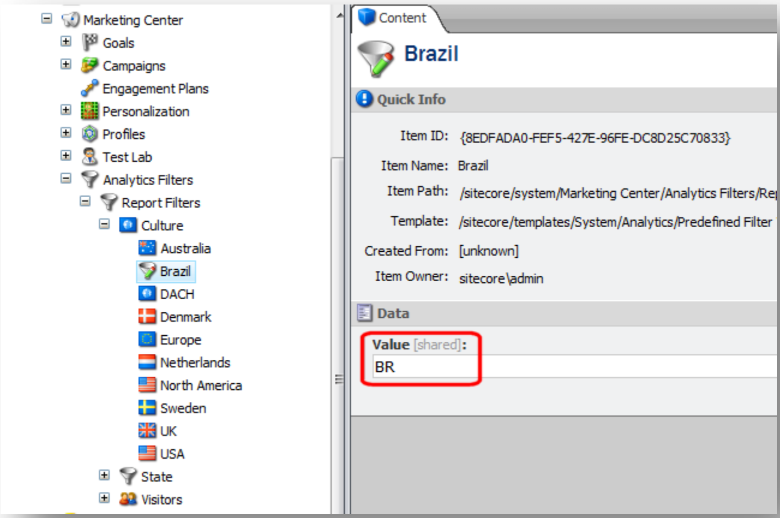
`/sitecore/system/Marketing Center/Analytics Filters/Report Filters/Culture`

2. In the **Insert** group, click *Predefined Filter Value*.

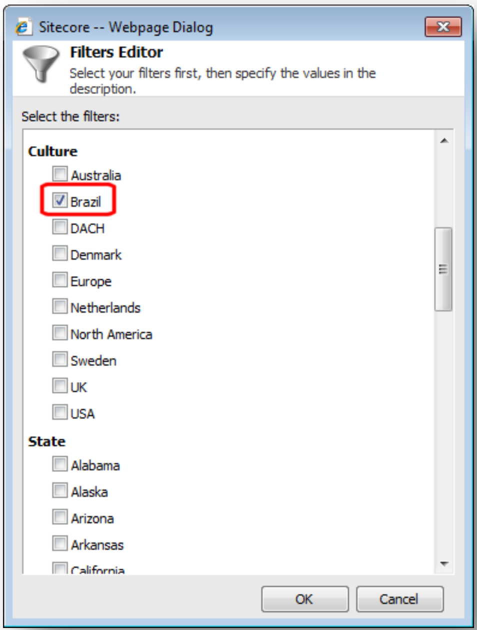


3. Name the new filter item *Brazil*.

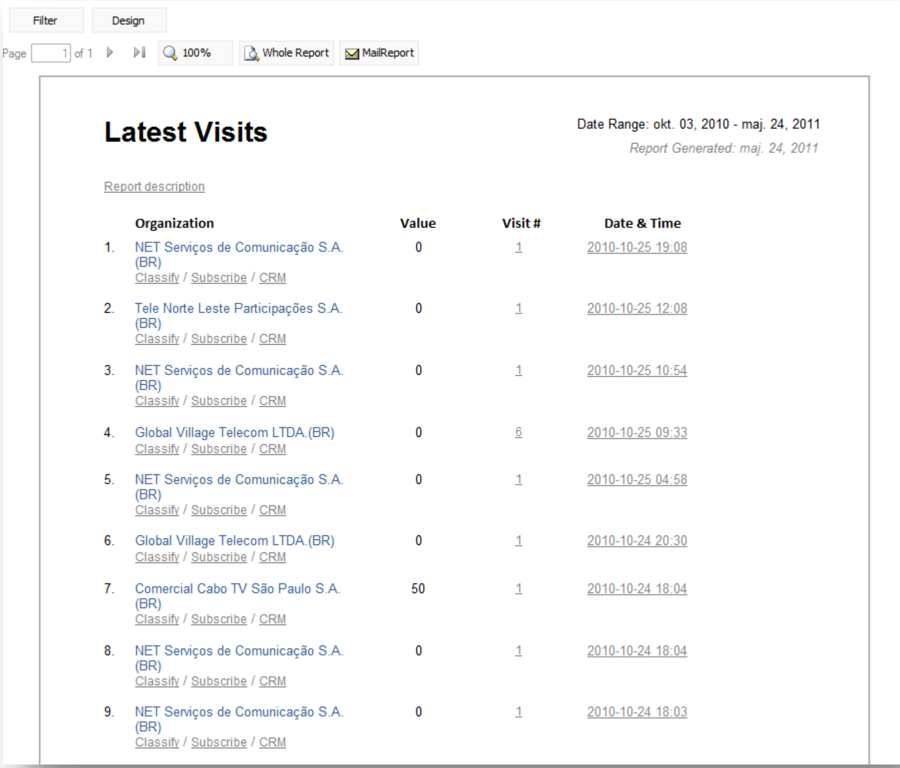
4. In the **Value** field, enter *BR,* which is the country code for Brazil.



5. Save your changes.
6. In **Engagement Analytics**, open the *Recent Visits* report.
7. In the *Recent Visits* report, select a suitable date range and then click **Filter**.
8. In the **Filter Editor** dialog box, you can now select the *Brazil* filter.



9. Click **OK** and in the *Recent Visits* report you now only see visits from Brazil.



Assigning an Icon to the Filter

To assign an icon to your filter:

1. Open the filter item.
2. Click the filter icon in the content item to open the **Icon** dialog box.

3. In the **Icon** dialog box, open the drop down box and select *Flags*.
4. Select the icon for the Brazilian flag and click **OK.**

For more information about creating reports, see the *Report Designer Cookbook*.