



Sitecore DMS 6.6

Sitecore DMS Terminology List

A list of definitions for the key terms and concepts used in Sitecore DMS

CEP – DMS – Analytics Terminology

- **Customer Engagement Platform — CEP**

Sitecore's array of content management, marketing, analytics, and platform tools that you can use to engage in a conversation with your visitors and customers.

- **Digital Marketing System — DMS**

Sitecore's marketing and analytics tools that you use to manage your online marketing activities. These tools allow you to create web forms, email campaigns, engagement plans, content profiles, and goals as well as study the analytics data that your website generates.

- **Marketing Automation**

A software platform designed for marketing departments and organizations to automate interaction with customers over time. It focuses on driving action by helping increase awareness and interest in a company's products and/or services and nurture leads from first interest through to sale/completion.

Analytics

- **Visitor**

A person that makes one or more visits to a website.

- **Visit**

All the actions a visitor takes from the moment they enter a website until the moment they leave and consists of all the pages viewed, and resources consumed, such as campaigns triggered and conversions achieved. Over time, a visitor can make many visits to a website.

Visitors must have cookies enabled to allow Sitecore to accurately track visitor sessions.

- **Session**

See Visit.

- **Conversation**

A series of interactions between your organization and a visitor. A two-way exchange of communication and commitment that takes place over several different media — real-world and digital. For example, the exchange of name and email address required to download a whitepaper or webinar recording by a visitor on your website.

- **Conversion**

The state of being bound emotionally or intellectually to a course of action. A bilateral pledge between a visitor and your organization.

There are three kinds of conversion – cash, referential, and transactional. MS says they are general, referential, and transactional

- **Cash Conversion**

The purchase of goods on an E-commerce website.

- **Transactional Conversion**

A visitor action such as registration, requesting a sales call, or signing up for an email newsletter. Any action that shows a higher level of engagement with the website than just browsing web pages or downloading a document.

- **Referential Conversion**

Common on sites which do not have clear points of transactional commitment. Engagement value can be specified on a page or an asset that can be downloaded without a clear two-way exchange of information. Usually occurs on non-commercial sites.

- **Page Event - Analytics**

An action, associated with a webpage, which is triggered either by a visitor or automatically.

Examples:

- Visitor triggered page event – the visitor votes in a poll.
- Automatically triggered page event – the page requested threw an error.

Profiling

- **Profiling**

Used to characterize the content of your website and the behavior of website visitors and can be used for segmentation and personalization.

- **Profile**

A profile consists of one or more profile keys.

DMS includes content profiles and visitor profiles.

- **Profile Key**

A dimension in a profile.

- **Profile Value**

A numerical value that you can assign to content items for a specific profile key.

- **Profile Card**

Contains a predefined set of profile keys and profile values that you can assign to a content item.

For example, you could design a profile card to reflect a specific type of person that is expected to visit the website. A profile card for a program manager could portray a frequent website visitor. The program manager profile card could contain these profile keys:

- Conscientious = 9 profile value
- Decision Maker = 8 profile value

Profile cards save content editors work and decision time and make it easy for your organization to have a common understanding of how to create content profiles without understanding what a profile key or profile value really is.

Profile cards help you to quickly assign profile values consistently across the website.

- **Profile Card – Persona**

Used to describe a simple fictional character that represents a user type within your targeted demographic.

- **Radar Chart (General)**

A graphic representation of the profile key values assigned to profile and pattern cards.

In DMS, a radar chart usually has four axes that give you an overview of the relative importance of each profile key.

- **Content Profile**

Used to classify the content of your website in terms of the interests and preferences that you anticipate in your readers.

You can assign zero or more profile cards for each profile that is defined in the system to a piece of content.

- **Visitor Profile**

Is the sum of the content profiles assigned to the pages and items that a visitor consumes during a visit. A visitor has as many profiles as are defined in the system.

It is a dynamic set of profile information describing a visitor that can change with each page the visitor reads or each action the visitor takes on a website.

Enables you to gain a better understanding of the behavior, interests, and actions of your visitors. Used to map up against pattern cards to find the pattern that most closely matches the current visitor profile.

- **Persona (General)**

A fictional character created to represent a specific visitor type that might display similar behavior on a website. Useful for market segmentation, differentiation, and personalization.

Personas help you to evaluate the goals, desires, and limitations of visitors and make informed decisions about the content of your website.

For example, you could create a profile called Personas to help you classify or categorize visitors to your website.

- **Pattern Card**

A predefined set of profile values. A profile can have zero or more pattern cards associated with it.

During a website visit, Sitecore compares (in real time) the visitor profile(s) to all the pattern cards, for each profile, and continually matches the visitor profiles to the profile's pattern card that is the closest match.

You can then easily use pattern cards to define personalization rules without having to use profile key values.

- **Goal (General)**

A specific activity (page event) on a website that indicates success to the site owner. For example, filling in and submitting a webform typically results in a goal being registered.

- **Failure (General)**

A page event that represents an obstacle preventing a visitor from successfully completing a specific activity. Can be the result of visitor actions or technical errors. For example, *Login Failure* indicates that the visitor could not log in successfully to a website, which could be the result of the visitor entering incorrect information or a technical error. These events are generally system driven.

- **Conversion**

Occurs when a visitor completes a goal. Could be something simple like submitting a newsletter request or something more complex like making a purchase.

- **Campaign (General)**

A marketing activity designed to encourage the recipients to follow a specific course of action, such as, buying a product. Can appear in different media across a specific time frame.

- Online campaigns use digital media such as websites, e-mails, and social media.
- Offline campaigns use traditional media, such as, print, broadcast media, and personal interaction.

Website Elements

- **Entry Page (General)**

The first page in a visit.

The total number of entry pages is the same as the total number of visits in any period of time, because each visit contains at least one *page*.

Not to be equated or confused with a landing page.

- **Exit Page (General)**

The last page accessed during a visit. Indicates the end of a visit/session. In a tabbed or multi-window browser environment, the final page that a visitor accessed is recorded as the exit page even though you cannot say definitively that this was the last page that the visitor viewed.

The total number of exit pages is the same as the total number of visits in any period of time, because each visit contains at least one *page*.

- **Landing Page (General)**

The page to which a defined marketing effort (a campaign) directs the visitor.

Often optimized for specific keywords, audiences, or calls to action. Of particular importance in conveying information that motivates the visitor to become more engaged with the website because they represent a touch point or opportunity to present your message to the visitor.

A landing page is not necessarily an entry page, although it could be. On websites that use search ads, the visitor may return several times during a single session. A useful metric could be the number of landing pages per session which indicates the degree to which the visitor moves on and off a website.

Typically used in on-line marketing channels to describe the call to action of an advertisement.

- **GeoIP Lookup**

Uses the IP address to determine the location (city, country), and organization of visitors to your website. Sitecore uses a service which associates IP addresses with their respective

organizations and locations. Useful for identifying your visitors and in marketing segmentation, differentiation, and personalization.

- **Reverse DNS Lookup**

Uses the visitor's IP address to perform a reverse DNS lookup in an attempt to determine the name of the domain that the visitor's computer is associated with. Often contains inaccurate and ambiguous results and is not as accurate as GeoIP.

Testing

- **Component Level Testing**

The ability to easily test multiple variations of components on a page. This does not involve testing the whole page and does not require you to write special code.

- **Multivariate Testing (General)**

A test of all the permutations of multiple components and/or content on the same page to determine which combination of components is the most efficient.

Can be thought of as performing numerous A/B tests on one page at the same time. Also known as MV Testing.

- **Page Level Testing**

A test of two or more variations of a single page to determine which variation is the most efficient. Essentially an A/B/N test.

- **A/B Testing (General)**

A test of two different versions of a page, email, or component.

- **A/B/N Testing (General)**

A test of more than two options. See Component Level Testing, Page Level Testing, and AB Testing.

Engagement

- **Engagement Analytics**

A methodology that evaluates a visitor's level of commitment by correlating quantity with quality.

Marketers use Engagement Analytics to learn exactly which part of their marketing mix creates the greatest impact, which parts of their website draws the highest quality visitors, and where they should spend their marketing dollar.

- **Engagement Value**

A measurement used in Engagement Analytics to determine the degree of commitment exhibited by visitors to a website. The accumulated sum of engagement value points generated during one or more visits.

Engagement Value is often simply referred to as value.

- **Engagement Value Points**

A numeric value that you assign to the Engagement Value of, for example, a goal or page event.

For example:

- Newsletter Registration — 25 Engagement Value Points
- Request for Demo — 100 Engagement Value Points

The actual numeric value is unimportant. The ratio between the values for different actions, however, is very important. Some visitor actions require much more communication, trust, and commitment than others and should therefore have a higher engagement value.

For example, exchanging your email address when you register for a newsletter shows a low-level of engagement value. However, requesting a demo requires a much higher level of communication, trust, and commitment. You should therefore assign each of these different actions the engagement value points that are appropriate to their level of commitment.

Every time a visitor lands on a page that has a goal or page event associated with it, they accumulate engagement value points which contribute to their overall score. After they have left the website, this score becomes the engagement value for that visit.

- **Efficiency**

Also referred to as value per visit, value / visit or engagement value / visit. A measurement used in Engagement Analytics to determine your efficiency. An expression of the relationship between the quality (engagement value) and the quantity (visitors and visits).

Calculated as the ratio of engagement value to number of visits.

Measures how effective a website is at getting the visitor to achieve the goals created on a website. The more relevant a website is to its customers, the greater is its marketing effectiveness.

A high value per visit means that marketing is relevant to the consumers' needs and efficient from a marketer's perspective.

Sometimes the term *relevance* may be used, which is also essentially *efficiency*. However, *relevance* refers to assessing the mental state of a website visitor just before coming to the website, and the relevance of the first page displayed when they came to the website.

- **Value per Visit**

Measures how efficient the elements on your website are in generating value.

Formula:

$$\text{Value per Visit} = \text{Value/Visits}$$

A visit generates value when the visitor achieves a goal that has engagement value points associated with it. The value of a visit is the sum of all the engagement value points accumulated during that visit.

See Engagement Value.

Engagement Automation

- **Engagement Automation**

The process of implementing engagement plans that determines marketing interaction with visitors across multiple channels.

- **Engagement Plan**

A predefined plan used in Engagement Automation composed of a series of interactions with visitors. Interactions are subject to conditions which may check visitor profiles, visitor actions, and the passage of time.

Designed to nurture relationships with visitors by adapting communication to use the content, channels, and media that are appropriate for each individual conversation.

- **State**

A part of engagement automation that identifies a visitor's position in an engagement plan. In the course of a conversation, a visitor can occupy different states (only one state at a time per plan). These states can determine the content, channels, and media that are used and thereby affect the subsequent direction of the conversation.

- **Rule**

A combination of one or more conditions and actions.

- **Condition**

A clause associated with a state in engagement automation.

Evaluated to be either true or false for each visitor and the result determines the next state that the visitor should occupy and/or the actions that Sitecore should perform.

- **Action**

A response that can be performed as the result of the evaluation of one or more conditions in a rule.

For example, in personalization, when a visitor matches a particular pattern card, the website should display specific content.

- **Trigger**

An event that compels Sitecore to evaluate the conditions associated with a state.

In Sitecore engagement plans, you can specify:

- Visitor triggers.
- Timeout triggers.

- **Visitor Triggers**

A list of page events or goals. When a visitor performs an event or achieves a goal, Sitecore evaluates the conditions associated with the corresponding.

- **Timeout Trigger**

A timeout interval defined on a state. When a visitor occupies the state for more than the specified interval, Sitecore evaluates the conditions associated with the corresponding state. When you add a state to an engagement plan, you can specify a visitor triggers, a timeout trigger, or both.

Personalization

- **Personalization**

Using technology to accommodate the differences between individuals. For example, by customizing the visitor experience based on visitor behavior.

Implies automatic modifications based on the visitor characteristics, such as interests, social category, country, mobile device, city, context, and so on. Personalization implies changes based on implicit data, such as items purchased, information supplied, and pages viewed.

Not to be confused with *Customization* which is the conscious act of a visitor explicitly setting configuration options provided on a settings page, for example, customizing how iGoogle works.

There are two kinds of personalization: rule based personalization and adaptive personalization.

- **Rule Based Personalization --- Simple Personalization**

Uses logic based rules to determine the content that should be displayed. Rule based personalization can use, for example, the IP address or physical location of the visitor, the keywords they used to reach the site, the mobile device, or the goals they achieve on the website to determine the content that is displayed.

See Conditional Rendering Rule.

- **Adaptive Personalization --- Behavioral Personalization**

Dynamically changes the content of the website based on the visitor's behavior on the website during a visit. In Sitecore, adaptive personalization uses visitor profiles and pattern cards to dynamically "adapt" content on the fly.

- **Conditional Rendering (Sitecore - General)**

A piece of web content that is displayed or rendered when a pre-defined condition is met.

See Personalization.

- **Conditional Rendering Rule (Sitecore - General)**

Determines which content should be displayed based on the application of conditional logic to determine whether or not this visitor fulfills the conditions specified in the rule.

See Personalization.

Website Analysis

- **Traffic Type**

The channel through which a visitor came to a website.

Sitecore Engagement Analytics defines the following channels:

Channel	Definition
Direct	A visit to a website that originates from a visitor entering a specific URL in the address bar of a web browser. For example, you could enter <i>http://www.sitecore.net/dreamcore</i> to go directly to the Dreamcore landing page.
Email	A visit to a website that originates from a link contained in an email campaign.
Search Engine - Organic	A visit to a website that originates from a visitor entering a non-brand specific search term in a search engine. For example, you could enter <i>Best CMS</i> or <i>Top CMS software</i> and then click on one of the unpaid links displayed on the search results page to come to <i>www.sitecore.net</i> .

Channel	Definition
Search Engine - Branded	A visit to a website that originates from a visitor entering a specific brand name in a search engine. For example, you could enter <i>Sitecore</i> or <i>Sitecore CMS</i> and then click on one of the unpaid links displayed on the search results page to come to www.sitecore.net . You may configure as many brand name key words as you like.
Paid	A visit to a website that originates from a visitor clicking on a sponsored link. For example, the paid links in a website's own campaigns such as online Google Ad campaigns or banner ads.
Referred – Analyst	A visit to a website that originates from a link on an analyst website, such as Forrester or Gartner.
Referred – Blog	A visit to a website that originates from a link on a blog website.
Referred – Community	A visit to a website that originates from a social networking site, such as, Facebook or Twitter.
Referred – Conversations	A visit to a website that originates from a link in a chat, such as, Twitter or instant messaging program, such as, MSN Messenger.
Referred – News	A visit to a website that originates from a link on a news or media website.
Referred – Other	All the referred visits to a website are placed in this category until a marketer categorizes them in one of the other categories.
Referred – Wiki	A visit to a website that originates from a link on a wiki website.
RSS	A visit that originates from an RSS feed that you have created.

- **Referring Site (W3 General)**

An external website that contains a link to your website.

See Traffic Type.

- **Potential**

Identifies pages that have a lower value per visit than the average value per visit of all the pages on the website, and also have a high volume, and therefore have potential for improvement.

A measurement based on two formulas that calculate how much value you can gain if you increase the Value per visit of an underperforming page on a website.

Formula:

- $\text{Potential page value gain} = (\text{Entire Site Value per visit} - \text{Page Value per visit}) \times \text{Number of Visitors to Page (or visits in case only of specific unique path analysis)}$

- $\text{Potential value gain} = (\text{Average (Site) Efficiency} - \text{Efficiency}) \times \text{Number of Visits}$
- $\text{Potential} = \text{Potential value gain} * 100 / \text{Sum(All facets Values)}$

Some pages should and will always have a low Value per visit. However, if you create a landing page that should make a significant contribution to the website and it turns out to have a high potential (low Value per visit and high volume), you should re-examine it.

- **Recency (General)**

Used to describe the date of the most recent visit.

Charts

- **Brand Awareness Charts**

The charts in the Executive Dashboard that detail the Value, Visits, and Value per Visit generated by the traffic coming through the Direct and Search Engine - Branded channels.

Observe the trend over time to see if your brand awareness is increasing or decreasing.

- **Source Value Chart**

A chart in the Executive Dashboard that details which original channel ultimately captured the most value. This is a “first click” analysis. This might, for example, prove that while it appears on a per visit basis that direct visits are the most efficient, the reality is that it was the email channel which originally brought the clients to your site (and that those clients subsequently visit your website directly and perform valuable actions).

- **Assets Consumed Chart**

The chart in the Executive Dashboard that details the brochures, white papers, and other content that visitors downloaded from the website.

Bibliography

You can find more detailed information about Sitecore DMS and all of the concepts in this terminology list in Sitecore’s documentation.

Sitecore maintains a wide range of documentation for different audiences:

Marketers

- Engagement Automation Cookbook
- Executive Dashboard Cookbook
- Marketing Operations Cookbook

Developers

- DMS Performance Tuning Guide
- Engagement Analytics API Cookbook

- Engagement Analytics API Reference Guide
- Engagement Analytics Configuration Reference
- Report Designer Cookbook

Content Authors

- Content Author's Cookbook
- Marketing Operations Cookbook

All of these documents are available on the Sitecore Developer's Network:

- <http://sdn.sitecore.net/Reference/Sitecore%206/DMS%20Documentation.aspx>
- <http://sdn.sitecore.net/Reference/Sitecore%206/Content%20Authors%20Cookbook.aspx>