

Sitecore CMS 6.6 or later

Engagement Automation Cookbook

A marketer's guide to designing customer engagement plans.



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Chapter 1

Introduction

Engagement plans allow you to control some of the specific ways in which your website interacts and communicates with the visitors to your website.

This document should help marketers, developers, and content editors to create, monitor, and supervise engagement plans.

This document contains the following chapters:

- Chapter 1 Introduction This introduction to the manual.
- Chapter 2 Engagement Plans This chapter describes what an engagement plan is and describes how to design one.
- Chapter 3 Supervising and Monitoring an Engagement Plan This chapter describes how to monitor and supervise an engagement plan.



Chapter 2

Engagement Plans

In the Marketing Center, you can create engagement plans that determine how your website interacts with your customers across different channels. You can specify when and under what conditions this interaction should occur.

This chapter explains what an engagement plan is and describes how to design one.

This chapter contains the following sections:

- Engaging with Your Visitors
- Designing an Engagement Plan
- Actions and Rules
- Deploying an Engagement Plan



2.1 Engaging with Your Visitors

Attracting visitors to your web site is just one way of engaging with your customers. Organizations are engaged in a constant conversation with their customers and communicating with them through your website is just one important aspect of this ongoing conversation. You can communicate with them through advertising, special offers, newsletters, and so on. They can communicate with you by sending you orders, feedback, supplying you with more information about themselves, and by demonstrating their loyalty or lack of it.

Sitecore Engagement Analytics allows you to organize and structure some of these ongoing conversations by creating engagement plans that control how your website interacts with some of its visitors. Engagement plans help you to manage your on-going conversation with your prospects/audience/customers across various channels.

When you create an engagement plan you specify which conditions must be met before certain actions are performed. This allows you to manage specific parts of your online conversation with your customers — which actions are performed, which visitors are affected, and when these actions are performed.

Sitecore Engagement Analytics lets you monitor the behavior of visitors to your website and define what actions should be taken if they reach certain scores or achieve specific goals. You can enrich their experience on your website by creating personalized content for them or you can enroll them in an engagement plan that interacts with them in predefined ways, for example, by sending them an e-mail with details of special offers or invitations to participate in webinars.

If your Sitecore solution uses the WebForms for Marketers module, the E-Mail Campaign Manager module and is integrated with a CRM system, you can make your engagement plans even more dynamic. For example, when a visitor fills in a form, you can commit all of the information about their address, telephone number, e-mail address, and so on to your CRM system, and then you can enroll them in some of your ongoing e-mail campaigns and target them with offers and information about the products and services that you can offer.

These Sitecore modules are user friendly and don't demand much programming skills and thereby reduce the marketing team's dependence on the IT department.

Sitecore Engagement Analytics contains a set of tools that let you create, monitor, and supervise engagement plans.



2.2 Designing an Engagement Plan

When you create an engagement plan, you create a system whereby a particular part of certain visitors' online activity is subject to a set of rules and conditions that determine when specific actions are performed for these website visitors.

Before you can create an engagement plan, you must have a logical scenario that you want to implement. You can then design an engagement plan that implements this scenario as an integral part of your website and that functions seamlessly on your website when the conditions that you specify are met. These conditions can be about the visitor, for example, what they have done on your website or where they come from. The conditions can also be about the date that they visited the website, or the search term they used to come to the site.

Before you can create an engagement plan, you must ensure that all of the elements that you need to make this plan function are in place. This might include specific pages, graphical elements, e-mail messages, campaigns, and so on.

After you have designed your scenario and created all of the elements that it requires, you can start to implement the engagement plan in the Marketing Center. An engagement plan consists of a string of states, conditions, and actions that represent the logical sequence of the plan.

In the following example, we create an engagement plan that evaluates visitors to the Office Core website who have requested a brochure to determine whether or not they have also subscribed to the Office Core newsletter. If there are some visitors who have not subscribed to the newsletter, the engagement plan sends them an e-mail message that encourages them to sign up for the newsletter.

Prerequisites

When you design an engagement plan, you must ensure that all of the prerequisites are in place.

For the sake of this example, we can assume that every visitor who requests a brochure must fill in a form that contains their e-mail address. This form ensures that the visitors must enter a valid e-mail address. Furthermore, you can implement functionality that automatically adds a visitor to the initial state of the engagement plan when they click Submit after they fill in the form. Alternatively, you could automatically add the visitor to a predefined security group and then add the members of this security group to the initial state in the engagement plan.

An Engagement Plan

An engagement plan is a series of elements that are linked together to define a set of conditions and rules that must be met before certain actions are performed.

An engagement plan consists of:

- States the status of a website visitor. Whether or not they have visited certain pages, achieved specific goals, performed specific actions, where they come from, and so on.
- Conditions a series of rules that determine whether or not the visitors in a specific state fulfill certain criteria. These criteria can relate to the visitor in general or this particular visit.
- Rules the criteria that determine whether or not a visitor fulfills a condition.
- Triggers the events that determine when Sitecore should evaluate the conditions and rules associated with a state.
- Actions what Sitecore should do when visitors meet or fail to a meet the rules specified in a condition.

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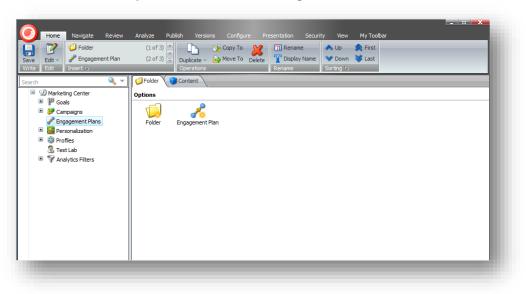


2.2.1 Creating an Engagement Plan

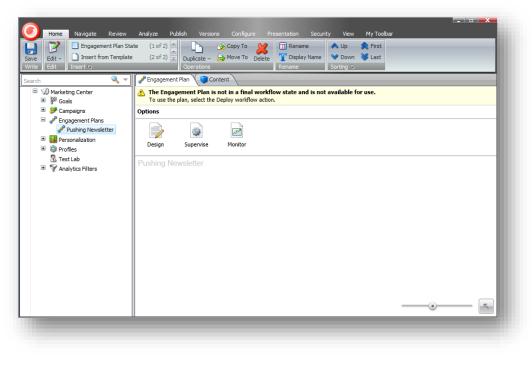
The first thing you must do is create the engagement plan item.

To create an engagement plan:

1. In the Sitecore Desktop, click Sitecore, Marketing Center.



- 2. In the **Marketing Center**, in the content tree, click **Engagement Plans** and then in the right-hand pane, on the **Folder** tab, click **Engagement Plan**.
- 3. In the dialog box that appears, enter a suitable name for the engagement plan and the engagement plan is displayed in the right-hand pane.





2.2.2 Creating the First State

After you have created the engagement plan, you can create the first state in the engagement plan.

To create a state:

1. On the Engagement Plan tab, in the Options section, click Design and the Designer appears.

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2. In the **Designer**, in the **New Items** group, click **State** and a state appears in the design pane of the engagement plan.

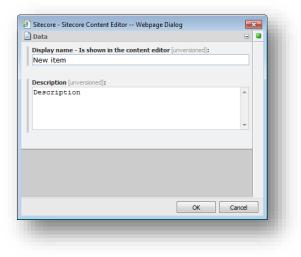
| Home View Save Export Image File Editing | Trigger State Condition Group Label | ltem Text Cotors |
|---|-------------------------------------|---|
| ✓ Standard ◇ Is Email Address Validated ◇ Is Email Link Clicked ◇ Is Email Opened ◇ Is Password Validated ◇ Time Spent in Automation State | Pushing Newsletter | Edit Trigger New item Description |
| Conditions | | R |



This is the first state in the engagement plan. Website visitors who are enrolled in an engagement plan do not have to be placed in the first state. The logic behind your plan could dictate that they are initially placed in another state.

However, in this example, this is the state that all the visitors who have requested a brochure are placed in.

3. Select the new state and click **Edit**.



4. In the dialog box, enter a description for this state, for example:

| Field | Value |
|--------------|--|
| Display name | Brochure Requested |
| Description | All the visitors who requested a brochure. |

5. Click Save.

2.2.3 Defining a Condition

After you have created the initial state, you can create the first condition that evaluates the visitors who are in this state.

To create a condition:

1. In the **Designer**, in design pane select the state and some symbols appear around the state.





2. Click one of the diamonds and a condition appears in the design pane.

| Save Export Image | | | | State Condition Group Label | Toolors |
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| | | | | | Brochure Requested All the visitors who requested a brochure. |
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| 🔷 Conditio | ons | | | | |

This is the first condition in the engagement plan.

In this example, it should determine that the visitors in the initial state have requested a brochure and that they haven't subscribed to our newsletter during this visit.

3. Select the condition and click Edit.

| core - Sitecore Content Editor - Mozilla Firefox | × |
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| Data | - |
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| Description | |
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4. In the dialog box, enter an appropriate name and description for the condition, for example:

| Field | Value | | |
|--------------|--|--|--|
| Display name | Visitor – plus brochure, minus newsletter. | | |
| Description | Has the visitor requested a brochure but not subscribed to the Office Core newsletter? | | |

5. In the **Evaluate** drop-down field, select *Always Evaluate*.

This value that you select for this field determines when Sitecore evaluates this condition. The options are:

| Option | Meaning | | |
|--|---|--|--|
| Always Evaluate | Sitecore evaluates the condition for both timeout triggers and subscribed events (visitor triggers). | | |
| Only Evaluate on Timeout | Sitecore evaluates the condition when the timeout interval you specify runs out. Sitecore evaluates the condition when: The visitor has been in this state for the timeout interval that you specified. The timeout interval that you specified has elapsed since the last time the condition was evaluated. If you select this option, Sitecore ignores the condition when it evaluates the state after a subscribed event has occurred. | | |
| Only Evaluate for Subscribed Events | Sitecore evaluates the condition for a visitor to the website who achieves one of the goals or activates one of the page events that are associated with this condition. If you select this option, Sitecore ignores the condition when it evaluates the state after a timeout event has occurred. | | |

Defining a Rule

You can now define the rule or set of rules that must be met when a trigger forces Sitecore to evaluate this condition.



1. In the Rule field, click Edit Rule to open the Rule Set Editor dialog box.

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| Rule Set Editor | |
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| elect the conditions for the rule: | |
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| when the current day of the month compares to number | |
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| where the current visitor is in any state in the specific engagement pla | |
| where the current visitor is in the <u>specific</u> state in the engagement plar | |
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This dialog box lists all of the conditions that you can use to create a rule or a set of rules.

2. In the **Select the condition for the rule** field, in the **Filter** field, enter *goal* and only the roles that contain the word *goal* are displayed. Alternatively, you can scroll down to the **Visits** section.



3. Select the where the specific goal was triggered during the current visit condition.

| | | × |
|--|---|-----------|
| Rule Set Editor | an spacify the values in the description | |
| | en specify the values in the description. | |
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4. In the **Rule description** field, in the **Rule 1** section, click *specific,* and the **Select Item** dialog box appears.

| | | X |
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| Select Item | | |
| Select the item to use in this rule. | | |
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| rowse Search | | 1 |
| S Brochures Request | | |
| Instant Demo | | |
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| 📄 Newsletter Signup | | |
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- 5. In the **Select Item** dialog box, select *Brochures Request*.
- 6. In the **Rule Set Editor** dialog box, in the **Select the condition for the rule** field, select the *where the specific goal was triggered during the current visit* condition again.
- 7. In the **Rule description** field, in the **Rule 1** section, click *where* and it automatically changes to *except where*.



8. Click *specific* and in the **Select Item** dialog box, select *Newsletter Signup*.

The **Rule Set Editor** dialog box should look like this:

| | × |
|---|-----------|
| Rule Set Editor | |
| Select the conditions and actions first. Then specify the values in the description. | |
| Select the conditions for the rule: | |
| goal | |
| Visit where the <u>specific</u> goal was triggered during the current visit | |
| | |
| | |
| | |
| | |
| Rule description (click an underlined value to edit it): | |
| Rule 1 | |
| where the Brochures Request goal was triggered during the current visit | |
| and except where the <u>Newsletter Signup</u> goal was triggered during the current visit | |
| Add a new rule | |
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| | OK Cancel |
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To satisfy this rule a visitor must have fulfilled the brochure request goal during the current session but not signed up for the newsletter during this session.

2.2.4 Triggers and Conditions

Now that you have created a rule and defined the conditions that must be fulfilled, you need to understand the concept of triggers. Triggers are the events that compel Sitecore to evaluate the conditions that you define in each rule.

In Sitecore engagement plans, you can specify:

- Visitor triggers.
- Timeout triggers.

Visitor Triggers

A visitor trigger specifies that when a visitor achieves one of the page events or goals that you specify, Sitecore automatically evaluates the rule to determine whether or not the visitor meets that condition and what action should be taken.

Timeout Triggers

A timeout trigger specifies that if the visitor has been in the associated state for the timeout interval that you specified or if the timeout interval has elapsed since the last time Sitecore evaluated the condition, Sitecore must evaluate the rule to determine whether or not the visitor meets the condition and what action should be taken.

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When you add a condition to an engagement plan, you can specify a visitor trigger, a timeout trigger, or both.

Specifying a Visitor Trigger

After you have defined all of the elements that make up this engagement plan, you can define the triggers that determine when Sitecore should evaluate the conditions that you have defined for this plan.

To define a visitor trigger for a state:

1. In the **Designer**, select the first state in the plan and then click **Trigger**.

| | | × |
|-------|--|---|
| | State Evaluation Triggers | |
| | When a visitor in this state achieves a selected goal or activates a selected page event, Sitecore evaluates the conditions associated with this state for that visitor | |
| ect t | the goals and page events that you want to associate with this state. | ~ |
| als | | |
| _ | Brochures Request | |
| | Instant Demo | |
| | Login | |
| | Newsletter Signup | |
| | Register | |
| ge | Events | |
| | Page Not Found | |
| | Page Error | |
| | Session Begin | |
| | Session End | |
| | Begin Transaction | |
| | Campaign | |
| | Campaign Registration Failed | |
| | Cancel Transaction | |
| | Download | |
| | End Transaction | |
| | Error | |
| | Field Changed | |
| | Follow Hit | |
| | Form Submitted | |
| | Information | |
| | Login Failed | V |
| | Logout | |
| | OK Cancel | 1 |
| | | _ |

2. In the **State Evaluation Triggers** dialog box, select the goals and page events that should trigger the evaluation of this state.

In this example, it makes sense to only select the Brochure Request goal.

When a visitor achieves one of the goals that you select, or when they activate one of the page events that you select, the engagement plan evaluates the conditions associated with this state for that particular user.

Specifying a Timeout Trigger

You can specify a timeout trigger for each state.



To specify a timeout trigger:

1. In the **Designer**, select the *Brochure Requested* state and in the bottom left-hand corner, click the drop down arrow.

| Home View | | | | | |
|-------------------------|---------------------------|------------------------------------|--|-----------------------|--|
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| Standard | | Pushing Newsletter | | | |
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| 🔷 ls Email Link Clicked | i | | | | |
| 📏 Is Email Opened | | | | | |
| Is Password Validate | be | | | | |
| Time Spent in Autor | ation State | | | | |
| | | | Brochure Requested | | |
| | | | All the visitors who requested a brochure. | | |
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| | | | 1 | Timeout date × | |
| | | | | Days: Hours: Minutes: | |
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| | | | | | |
| | | | Visitor – plus | | |
| Conditions | | | Visitor – plus brochure, minus newsletter. | | |
| Conditions | | | brochure, minus | | |

2. In the **Timeout Date** dialog box, enter two days.

You have now specified how long time a visitor should be in this state before Sitecore evaluates the associated condition for this state.

This is also the maximum time interval that can elapse before the condition is evaluated again.

When Sitecore places a visitor in a state, it uses the time interval that you specified to calculate when it should evaluate the conditions associated with that state for that user. When the time interval elapses and the visitor is still in that state, Sitecore evaluates the conditions associated with this state for that particular visitor.

You can specify different triggers and time intervals for all of the states in an engagement plan.

2.2.5 Evaluating Conditions

Now that you have defined a state, a condition that evaluates the visitors in that state, what triggers this evaluation, and when this evaluation should take place, you can specify what should happen to the visitors who meet the rules you defined for this condition.

In Sitecore engagement plans when a visitor meets a condition, they can be moved to another state or back to the original state. When they don't meet a condition, they can be evaluated by another condition or remain in the original state.

You must therefore define the next state in the engagement plan and the actions that the engagement plan should perform.

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Defining the Next State

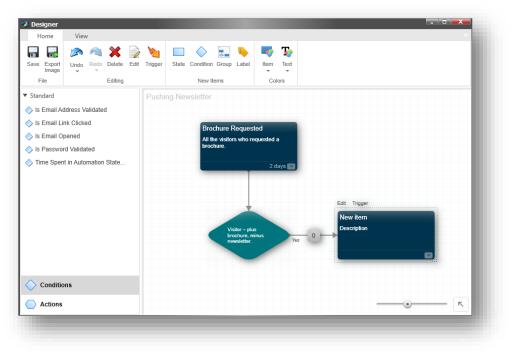
In this example, when a visitor meets the conditions specified for the first state, they should be moved to the next state in the engagement plan.

To create the next state:

1. In the **Designer**, click the condition and a number of shapes appear around the condition.

| Home | View | | | | | | | | | | | | | |
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| Actions | • | | | | | | | | | | | | | |

2. Click one of the rectangles and a new state is added to the engagement plan.





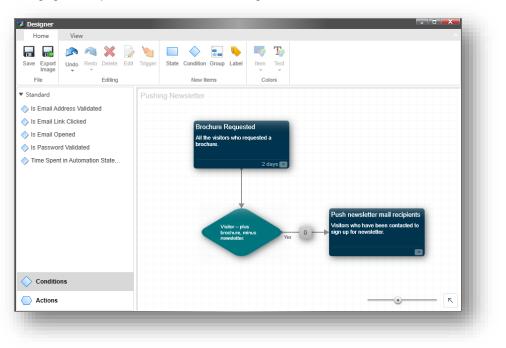
In the **Designer**, you can see that there is a Yes beside the arrow linking the condition to the new state. This indicates that this applies to the visitors who satisfy the rules that you defined in the condition.

- 3. Select the new state and click **Edit**.
- 4. In the dialog box, enter the following values:

| Field | Value |
|--------------|---|
| Display name | Push newsletter mail recipients |
| Description | Visitors who have been contacted to sign up for newsletter. |

5. Click Save.

The engagement plan should look something like this:



Defining an Action

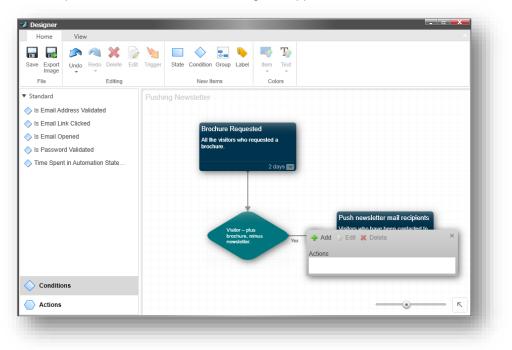
After you have defined the next state, you can define the action that the engagement plan should perform on the visitors who meet the conditions specified for the previous state.

There is a small square box in the middle of the arrow that connects the condition with the new state. This is the where you define the actions that should be performed on the visitors who meet the condition that you defined for the first state.



To create an action:

1. Click the square box and the **Actions** dialog box appears.



2. Click Add and a dialog box appears.

| Save Ex | 2 | View | | XX Delete | Edit | Trigger | State | Conc | dition C | Sroup | الله Label | Item | Text | | | |
|--------------------------|---|-----------------------|---|--------------|------|---------|-------|------|----------|-----------------------|----------------------------------|---------|--------|---|------------|---|
| File | | | 1 | Editing | | | | N | lew Iten | ns | | Co | lors | To add an action, double click it or drag an | d drop it. | × |
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| 🔷 Cor | nditions | | | | | | | | | | | | | | _ | |
| Act | tions | | | | | | | | | | | | | | | 7 |

This dialog box lists all of the actions that are available.

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3. In this dialog box, double click the Send Email Message action to add it to the Actions field.

| Save Export Image Undo Redo Delete Edit Trigger State Condition Group Label Item Ted File Editing New Items Colors Colors 'Standard > Is Email Address Validated Pushing Newsletter Brochure Requested All the visitors who requested a brochure. All the visitors who requested a brochure. | |
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| Save Export image Undo Redo Delete Editi Trigger State Control File Editing New Items Colors 'Standard Item Item Pushing Newsletter Is Email Address Validated Is Email Chicked Is Email Chicked Brochure Requested All the visitors who requested a brochure. | |
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| Standard Standard Is Email Address Validated Is Email Link Clicked Is Email Opened Is Email Opened Is Password Validated Trans Sensor is Automation State | |
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| Is Email Link Clicked Is Email Opened Is Sassword Validated Trans Served Validated | |
| Is Email Opened All the visitors who requested a Is Password Validated Tree Special in Automation State | |
| Is Email Opened All the visitors who requested a Is Password Validated Tree Special in Automation State | |
| Time Spent in Automation State | |
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| | Push newsletter mail recipients |
| Visitor – plus brochure, minus | Mistors who have been contacted to Yes |
| newsletter. | 163 |
| | Actions P Send E-Mail Message |
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| Conditions | |
| Actions | |
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4. In the **Actions** dialog box, click **Edit** to configure the action.

| | X |
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| | Mail Message |
| Create the | e-mail message that you want to send |
| From Name: | |
| From Address: | |
| To Address Type: | Current Visitors Email Address V |
| Subject: | |
| Base Site URL: | http://localhost |
| | The base URL for any images and links embedded in the message |
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| | OK Cancel |
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- 5. In the **Send E-mail Message** dialog box, you can create a message that encourages these visitors to sign up for the newsletter.
- 6. In the **Designer**, click **Save**.



The actions box in the engagement plan now displays the number 1. This indicates that you have defined one action.

You have now configured the actions that this engagement plan performs when visitors to your website meet the conditions that you specified for the first state.

You have now created a simple engagement plan.

In the Engagement Plan Designer, click Save.

As we mentioned earlier, in an engagement plan, you can move visitors to another state or leave them in the original state.

In this plan, it makes the sense to move the visitors who receive the e-mail message into another state. By moving the visitors to this state instead of leaving them in the initial state, you ensure that they don't receive the same e-mail message several times.

The engagement plan should look something like this:

| Designer Home View | |
|--|--|
| Save Export Image | Image: State Condition Group Label Image: Text |
| File Editing | New Items Colors |
| Standard Is Email Address Validated Is Email Link Clicked Is Email Opened Is Password Validated Time Spent in Automation State | Pushing Newsletter Brochure Requested All the visitors who requested a brochure. 2 days |
| | Visitor - plus brockure, minus newsletter. Visitors who have been contacted to sign up for newsletter. |
| ~ _ | |
| Actions | K_ |

This is a very simple engagement plan that is designed to illustrate how to create a plan in the Sitecore Marketing Center. In a real world business scenario, this engagement plan would be much more detailed and could, for example, contain another condition that evaluates whether or not the visitors who received the e-mail message actually opened it and whether or not they clicked the link to the newsletter subscription form that the message contains.

If they did subscribe to the newsletter, you could, for example, include an action that increases the lead score of these visitors and another action that informs your sales team that these visitors are potential customers. In short, there are many possibilities and you can get your IT department to create new actions and rules that will enable you to create detailed engagement plans that suit your business.

2.2.6 Adding a Label to an Engagement Plan

As your engagement plans grow and get more complicated, you may need to add some labels that contain descriptions of the plan and the situations that it is designed to address. These labels can be useful in explaining the engagement plans to other employees who need to understand and use them.



To add a label:

- 1. Open the engagement plan in the **Designer**.
- 2. In the **New Items** group, click **Label** and a new item appears in the engagement plan.
- 3. Select the new item and drag it to an appropriate place.
- 4. In the new item, double click the text and enter the text that you want to insert into the engagement plan.
- 5. Resize the label and drag it to an appropriate place in the plan.

| Save Export image Undo Redo Delete Edit Trigger State Condition Group Label Item Text File Editing New Items Colors Colors Colors Colors Standard Is Email Address Validated Pushing Newsletter As your engagement plans grow and q more complicated, you may need to a some labels that contain descriptions plan and the situations that its design address. These labels can be useful in the engagement plans to o | | | | | | ~ | | Viev | ome | 🧏 Des |
|---|---|---------------|-----------------|----------|-----|---------|------------|---------------------------------|-------------------------------|--------------------------|
| File Editing New Items Colors Standard Is Email Address Validated Is Email Cicked Is Email Opened Is Password Validated Time Spent in Automation State Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time Value - plass who need to understand a time | | abel Item | • | | | ••• | - | Undo | Export | 4 |
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| Is Email Link Clicked Is Email Opened Is Email Opened Is Password Validated Time Spent in Automation State Push newsletter mail recipients Value of the Value of th | | | wsletter | hing Nev | Pus | | | | dard | ▼ Stan |
| Visitor - plus brochure, minus newsletter. Yes 1 Visitors who have been contacted to sign up for newsletter. | As your engagement plans grow and get more complicated, you may need to add some labels that contain descriptions of the plan and the situations that it is designed to address. These labels can be useful in explaining the engagement plans to other employees who need to understand and use them. | nho requested | All the visitor | | | | ed Ited | nk Clicke pened rd Valida | Email Li Email O Passwo | > Is > Is > Is |
| | Visitors who have been contacted to sign up for newsletter. | ure, minus | bro | | | | | | | |
| Conditions | | | | | | | | ons | Conditio | \diamond |
| Actions | | | | | | | | | Actions | |



2.3 Actions and Rules

The Sitecore Marketing center comes with a number of predefined actions and rules that you can use to create engagement plans.

The things that you can do with the predefined actions include:

- Increase or decrease the profile value of a visitor
- Add or remove the visitor from an engagement plan or state
- Send an e-mail message

The things that you can evaluate with the predefined rules include:

- The level of authentication that the visitor has.
- The country, city, postal code, and IP address that the visitor comes from.
- The number of times the visitor has been on the website.
- Whether or not the visitor has triggered a campaign event.

Needless to say, these predefined actions and rules do not allow you to create all of the engagement plans that you can devise for your website. The engagement plans that you devise can vary in size and scope depending on any number of factors including the business you are in, the size of your website, your target audience, what kind of campaigns you are running, and so on.

Your IT department or Sitecore partner can easily create new conditions, rules, and actions for you, as well as any pages, forms, security roles, and so on that you may need.



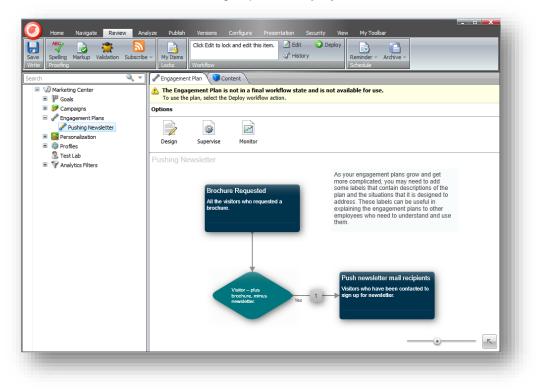
2.4 Deploying an Engagement Plan

When you create an engagement plan, it is subject to a workflow and you *must* deploy it before you can use it on your website.

You must also deploy an engagement plan before you can test it, supervise it, and so on.

To deploy an engagement plan:

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





2.5 Enrolling Visitors in an Engagement Plan

After you create an engagement plan, you must configure the methods by which visitors are enrolled in the engagement plan.

Website visitors can be enrolled in an engagement plan:

- When they participate in a campaign.
- When they fill in a web form.
- When you add them to the engagement plan.

2.5.1 Using Campaigns to Enroll a Visitor in an Engagement Plan

You can also create campaigns in the Sitecore Marketing Center.

When you create a campaign, you can specify that visitors who participate in a campaign are automatically enrolled in an engagement plan.

To link a campaign to an engagement plan:

1. In the **Marketing Center**, select the campaign that you want to link to an engagement plan.

| Home Navigate Review Ana ABC I I I I I I I I I I I I I I I I I I I | ilyze Publish Versions Configure Presentation Security View My Toobar Image: Ward of the security of t | |
|--|--|---|
| ch Q V Gold Compaigns | | |
| | Traffic Type Change Traffic Type - (for every visit that triggers this campaign) [shared, standard value]: | - |



2. In the campaign item, in the **Enroll in Engagement Plan** field, click **Edit** and the **Select Items** dialog box appears.

| tions | All | Selected | | |
|-------|--|----------|----|--------|
| tors | <i>P</i> Engagement Plans <i>P</i> Pushing Newsletter <i>P</i> Test Engagement Plan | 0 | | 0 |
| | [<u> </u> | | ОК | Cancel |

3. In the **Select Items** dialog box, expand the engagement plan that you are interested in and select the select the state that you want to enroll visitors in when they participate in this campaign.

For more information about campaigns see the manual Marketing Operations Cookbook.

2.5.2 Using Web Forms to Enroll Visitors in an Engagement Plan

If you use the Sitecore Web Forms for Marketers module to create the forms that you use on your website, you can specify that visitors who fill in a form are automatically enrolled in an engagement plan.

To link a form to an engagement plan:

1. In the Sitecore Desktop, click Sitecore, Web Forms for Marketers, Form Designer.



2. In the **Form Designer**, select the form that you want to link to an engagement plan and it opens in the **Form Designer**.

| Get Our Newsletter - Form Designer | | | - | - 0 × |
|--|------------------------------|------------------------------|--|--------|
| Save Save/Close Title Introduction Footer Write | English - To ascx | | Form Reports Close | |
| Submit | | | | |
| utton Name | | Cat One Name | | |
| Subscribe | | Get Our Newsle | etter | |
| 🗸 Form Verification | Edit | | | |
| Use these actions to verify the data submitted in th comparing the values with other data sources. If a visitor is returned to the form, and an error messag | Form Verification fails, the | Title Email | Type E-mail | Requir |
| Assess Security Risk | | Title Type the text shown | Captcha | Requir |
| Save Actions | Edit | Add Field | | |
| Use these to perform specific actions when a form is Save Action fails, the form is processed but the visit message. | | Add Heid | | |
| 🐻 Save to Database | | | | |
| P Register a Goal | | Subscribe | | |
| Success | Edit | | | |
| When a form is successfully submitted, you can disp success message. | lay a specific page or a | | | |
| Success Page: [none] | | | | |
| Success Message: Thank you for filling in the fo | rm. | | | |
| | | | | |
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3. In the **Form Designer**, select the submit button and in the left hand panel in **Save Actions** section click **Edit** and the **Save Actions** dialog box appears.

| Save Actions Select the Save Actions to perform when a form is sub the form is submitted successfully and the visitor is sh | |
|---|--|
| Ctions Error Messages Save Actions | |
| Save Actions/Save to Database | Add |
| Save form data to the database Save form data to the database W Register a Goal System action. Track a form goal | Edit Remove Move Up Move Down |
| | OK Cancel |

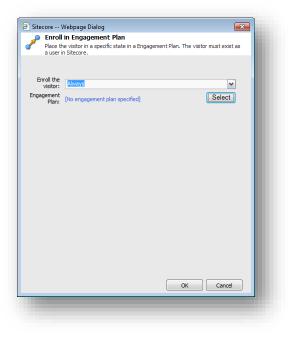
4. In the **Save Actions** dialog box, in the **Save Actions** field, click the drop-down arrow and select *Enroll in Engagement Plan* and then click **Add** and the save action is added to the **Added Save**



Actions field.

| Sitecore Webpage Dialog | × |
|---|-----------|
| Save Actions | |
| Select the Save Actions to perform when a form is submitted. If a Saturn the form is submitted successfully and the visitor is shown an error r | |
| Actions Error Messages | |
| Save Actions | |
| Save Actions/Enroll in Engagement Plan 🛛 😽 | Add |
| Added Save Actions: | |
| Save to Database Save form data to the database | Edit |
| Enroll in Engagement Plan | Remove |
| Place the visitor in a specific state in an Engagement Plan | Move Up |
| Register a Goal System action. Track a form goal | Move Down |
| System dealorn index a form godi | |
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| OK | Cancel |
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5. In the Added Save Actions field, select the *Enroll in Engagement Plan* save action and then click Edit.





6. In the Enroll in Engagement Plan dialog box, click Select.

| Sitecore Webpage Dialog | X |
|---|-----------|
| Select Engagement Plan Select an Engagement Plan | |
| elect a state of an engagement plan: | |
| Enter search criteria | 0 |
| Pushing Newsletter | × |
| Brochure Requested | |
| Push newsletter mail recipients | |
| Test Engagement Plan | * |
| First State | |
| Second State | |
| Third State | |
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| | OK Cancel |
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- 7. In the **Select Engagement Plan** dialog box, expand the engagement plan that you want to enroll the visitor in, and select the state that they should be added to.
- 8. Save and publish these changes to the form.

When a visitor to your website fills in this form and submits the form, they are automatically enrolled in the engagement plan and added to the state that you specified.

For more information about the **Web Forms for Marketers** module, see the manuals *Web Forms for Marketers Reference Guide* and *Web Forms for Marketers User Guide.*

For more information about adding a user to an engagement plan, see the section Adding a Visitor to an Engagement Plan.



Chapter 3

Supervising and Monitoring an Engagement Plan

After you have created and deployed an engagement plan, you can open it in the Supervisor to test it and make sure that it works correctly. In the Supervisor, you can add visitors to any state in the engagement plan and then execute the conditions and rules that have been defined for that state.

You can also view the engagement plan in the Monitor. The monitor gives you an overview of the plan and lets you see how many visitors are in each state.

This chapter contains the following sections:

- Supervising an Engagement Plan
- Monitoring an Engagement Plan



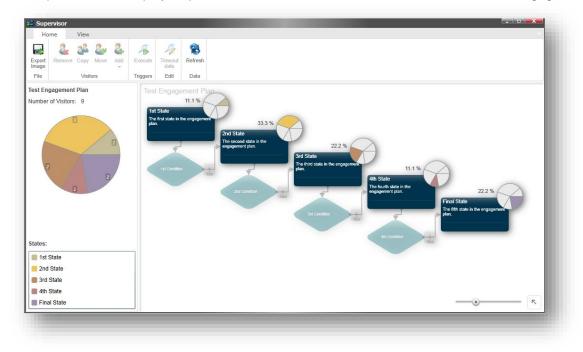
3.1 Supervising an Engagement Plan

After you have deployed an engagement plan, you can open it in the supervisor and see how many users are currently in each state in the plan. You can also test your engagement plans before they go live. You can add visitors to any of the states that it contains and then make the plan evaluate the conditions that you have defined and force the triggers.

In the Supervisor, you can see:

- All of the states and conditions in the engagement plan.
- The number of visitors that are in each state.
- The percentage of the total number of visitors that are in each state.

The supervisor also displays a pie chart that illustrates the distribution of visitors in the engagement plan.



3.1.1 Adding a Visitor to an Engagement Plan

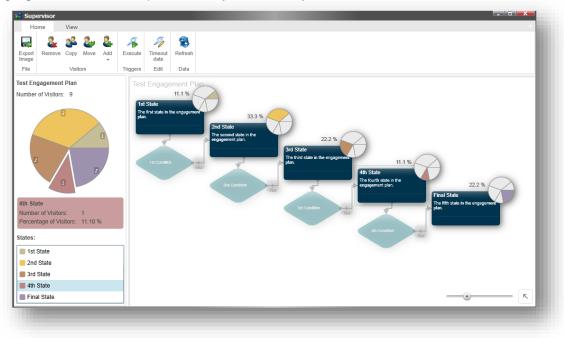
You can add visitors to any state in an engagement plan and then force the plan to evaluate the conditions that you have defined for that state.

To add a visitor to an engagement plan:

1. In the **Marketing Center**, select the engagement plan that you are interested in and then click **Supervise**.



2. In the engagement plan, select the state that you want to add a visitor to and the supervisor highlights that slice of the pie and tells you how many visitors are in that state.



3. On the ribbon, on the Home tab, in the Visitors group, click Add.

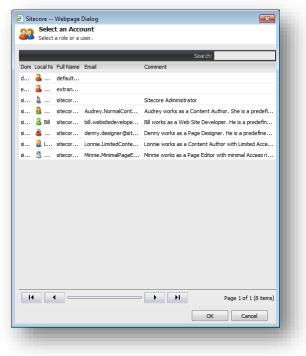
There are four ways to add visitors to a state:

| Option | Description |
|------------------------------------|---|
| Add From CSV File | You can add all the visitors that are listed in a comma separated value file. |
| Add a Sitecore User | You can add a specific user from the list of visitors who are in the Sitecore security system. |
| Add all Members of a Sitecore Role | You can add all the visitors who are members of a particular Sitecore role. |
| Add a Segment | You can create a segment of the visitors who are in the Sitecore security system and add it to the state. |

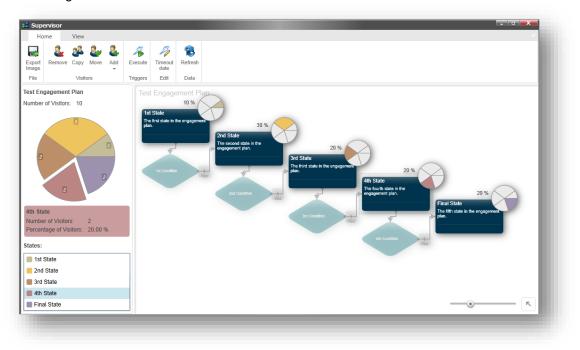
4. Click Add a Sitecore User and the Select an Account dialog box appears.



5. In the **Select an Account** dialog box, select the user that you want to add to this state in the engagement plan and click **OK**.



In the **Supervisor**, you can see that the user is added to the current state and the size of the corresponding slice has increased. You may need to click **Refresh** to update the data displayed in the dialog box.



In this example, the user was added to the 4th State and its percentage has increased to 20%.



3.2 Adding a Segment to a State

If you want to add a segment of visitors to an engagement plan, you must first create the segment. The Dynamic Segment Builder is a tool that lets you specify a list of conditions and rules that determine which visitors belong in the segment. Only the visitors who meet these conditions and rules are added to segment.

To create a segment of visitors:

- 1. In the **Supervisor**, select the state that you want to add the segment to.
- 2. On the **Home** tab, in the **Visitors** group, click **Add**, and then click **Add a Segment** and the **Dynamic Segment Builder** dialog box appears.

| Sitecore Webpage Dialog Dynamic Segment Builder | | |
|--|---|--|
| Define the set of conditions that determ segment. Visitors that match multiple co | Define the set of conditions that determine which web site visitors to include in this segment. Visitors that match multiple conditions are only included once. The total number of visitors in the segment may differ from the sum of the visitors matched by each | |
| | Add Condition | |
| onditions | Total in this segment: 0 | |
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| | OK Cancel | |
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In the **Total in this segment** field, you can see that this segment currently contains no visitors.



3. In the **Dynamic Segment Builder** dialog box, click **Add Condition** and the dialog box displays a placeholder for the condition.

| Dynamic Segment B | | |
|---------------------------|-------------------------------|--|
| segment. Visitors that ma | tch multiple conditions are o | b site visitors to include in this only included once. The total number the visitors matched by each |
| | | Add Condition |
| ditions | | Total in this segment: 0 |
| ondition Name | | Actions 🔻 🙈 |
| s rule has no conditions. | Edit | Matched by this condition: 0 |
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| | | OK Cancel |

- 4. In the **Condition Name** field, enter a name for this condition. You can change the name later.
- 5. Click Edit to open the Rule Set Editor dialog box.

| Rule Set Editor Select the conditions and actions first. Then specify the values in the description. elect the conditions for the rule: Automation State where a visitor is in the specify state of an engagement plan where a visitor is in any state of the specific engagement plan where a visitor is in any state of the specific engagement plan • CossRications where the visitor identification compares to specific value • Events where the visitor has triggered the specific goals at least once where the visitor has triggered the specific goals at least once • Geo IP where this during numeric numer compares to present value • Use state of the specific value | Sitecore Webpage Dialog | X |
|---|--|----------|
| Select the conditions and actions first. Then specify the values in the description. Lett the conditions for the rule: Automation State Where a visitor is in the specific state of an engagement plan where a visitor is in any state of the specific engagement plan where a visitor is in any state of the specific engagement plan where the visitor has triggered the specific yeak at the set once where the visitor has triggered the specific yeak at the set once where the visitor has triggered the specific yeak at the set once where the visitor has triggered the specific yeak at the set once where the visitor has triggered the specific yeak at the set once where the visitor has triggered the specific yeak at the set once where the visitor has triggered the specific yeak at the set once where the visitor has triggered the specific yeak at the set once the set of the set once the set of the set o | | |
| elect the conditions for the rule: Automation State where a visitor is in the goedfic state of an engagement plan where a visitor is in any state of the goedfic engagement plan where a visitor is in any state of the goedfic engagement plan Cassifications where the visitor identification compares to goedfic value Cents where the visitor has triggered the goedfic value where the visitor for the value to edit it): Goegraphy This rule has no conditions. | | |
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| Geo IP where the Burdeer name conserve to manifer value wile description (dick an underlined value to edit it); Geography This rule has no conditions. | | |
| under state the Bisinery name comparer to marife value • • | | |
| tule description (dick an underlined value to edit it): Geography This rule has no conditions. | | - |
| Geography This rule has no conditions. | where the Rusiness name compares to specific value | |
| OK Cancel | This rule has no conditions. | |
| | OK Cance | |



6. In the **Rule Set Editor** dialog box, in the **Select the conditions for the rule** field, select a condition that the visitors must fulfill to be in this segment, for example, that they must come from a particular country or region.

| Select the conditions and actions first. Then specify the values in the description. | |
|--|--------|
| ct the conditions for the rule: | |
| r | |
| Classifications | * |
| where the visitor identification compares to specific value | |
| Events | |
| where the visitor has triggered the specific goal at least once | |
| where the visitor has triggered the specific goals at least once | E |
| Geo IP | |
| where the Business name compares to specific value | |
| where the city compares to specific city | |
| where the country compares to specific country | |
| where the external keywords compares to specific value | |
| where the local keywords compares to specific value | * |
| where the country <u>compares to specific country</u> | |
| | Cancel |

- 7. In the **Rule description** field, click *compares to* and then in the **Select Comparison** dialog box, select *is equal to*.
- 8. In the **Rule description** field, click *specific country*, and then in the **Select Item** dialog box, select the country or region that the visitors should come from, for example *Europe*.



9. In the **Rule Set Editor** dialog box, click **OK** and the condition is added to the **Dynamic Segment Builder** dialog box.

| Sitecore Webpage Dialog Dynamic Segment Builder | | | | |
|---|-------------------------------------|--|--|--|
| Define the set of conditions that determine which web site visitors to include in this segment. Visitors that match multiple conditions are only included once. The total number of visitors in the segment may differ from the sum of the visitors matched by each condition. | | | | |
| | Add Condition | | | |
| nditions | Total in this segment: 1630 | | | |
| Geography | Actions 👻 🙈 | | | |
| here the country is equal to rope | dit Matched by this condition: 1630 | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

The Matched by this condition field tells you how many visitors fulfill this condition.

The Total in this segment field tells you how many visitors are in the current segment.

10. Click **OK** and the users in this segment are added to the current state in the engagement plan.

When you create a segment, you may want it to contain visitors who match different conditions or who match a combination of conditions. The Dynamic Segment Builder lets you add more conditions and rules to create complex segments.

3.2.1 Increasing the Range of a Segment

In the previous example, you created a simple segment based on the geographic location of the visitors. You can easily increase the range of this segment by adding more conditions that visitors must fulfill before they are added to this segment.



For example, you can add another condition to the segment that only selects the visitors who have fulfilled a particular goal.

| Dynamic Segment Builder Define the set of conditions that determine which web site visitors to indude in this segment. Visitors into match multiple conditions are only included once. The total number of visitors in the segment may differ from the sum of the visitors matched by each condition. | | |
|---|---------------------------------|--|
| | Add Condition | |
| onditions | Total in this segment: 4116 | |
| Geography | Actions 👻 🙈 | |
| where the country is equal to Edit | Matched by this condition: 1630 | |
| Goals | Actions 🔻 🙈 | |
| vhere the visitor has riggered the Instant Demo joal at least once | Matched by this condition: 2494 | |
| | | |
| | | |
| | OK Cancel | |

In this example, the second condition selects the visitors who requested an instant demo when they visited the website. You can see that the visitors who matched each condition are added to the segment.

This segment now contains all the visitors who live in Europe and all the visitors who requested an instant demo — regardless of where they live.

In this example, you can see that the total number of visitors who satisfy each condition and the total number of visitors who are added to the segment are not the same:

| Condition | Total | Segment Total |
|-------------------------------------|-------|---------------|
| A — Live in Europe | 1630 | |
| B — Triggered the Instant Demo goal | 2494 | |
| A + B | 4124 | 4116 |

This is because some of the visitors to the website satisfy both conditions — they live in Europe *and* they have requested an instant demo. The Dynamic Segment Builder only adds a visitor to a segment once.

You can add as many conditions as you need to ensure that the members of this segment meet your requirements.

3.2.2 Narrowing the Range of a Segment

You can also refine your selection and make the segment more granular so that it contains fewer visitors. Perhaps you want the segment to only contain the visitors *who live in Europe and have also requested an instant demo*.

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You do this by adding a new rule to the first condition.

| Ĩ | Dynamic Segment Builder | | | |
|--------------------|---|------------------------------|--|--|
| J | Define the set of conditions that determine which web site visitors to include in this segment. Visitors that match multiple conditions are only included once. The total number of visitors in the segment may differ from the sum of the visitors matched by each condition. | | | |
| | | Add Condition | | |
| ndi | tions | Total in this segment: 8 | | |
| Geo | ography | Actions 👻 🙈 | | |
| urop a rigge | e the country is equal to Edit pe nd where the visitor has red the Instant Demo at least once | Matched by this condition: 8 | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | OK Cancel | | |
| | | | | |

Now this segment only contains those visitors who live in Europe and who have requested an instant demo.

Removing a Condition from the Segment Builder

When you are working with the Segment Builder, you may occasionally need to remove a condition from the segment you are building.



To remove a condition from a segment:

In the **Dynamic Segment Builder** dialog box, click **Actions** in the condition that you want to remove and then click **Delete**.

| Dynamic Segment Builder Define the set of conditions that di segment. Visitors that match multip of visitors in the segment may diffi condition. | ole conditions are only inclu | uded once. The total number |
|--|-------------------------------|-------------------------------|
| | | Add Condition |
| onditions Geography | | Total in this segment: 4116 |
| where the country is equal to Europe | Edit Ma | tched by this condition: 1630 |
| Goals | | Actions 🔻 🙈 |
| where the visitor has triggered the Instant Demo goal at least once | Edit Ma | tched by th 🔕 Delete 94 |
| | | |
| | | |
| | | |
| | | |
| | | OK Cancel |

Important

Segments are not saved. Every time you want to add a segment to an engagement plan, you must build the segment.



3.3 Executing a Trigger

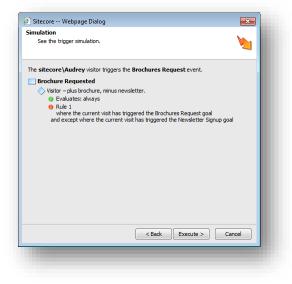
In the Supervisor, you can execute the trigger associated with a state and force the engagement plan to evaluate the conditions associated with a particular state.

To execute a trigger:

- 1. In the **Supervisor**, select a state that contains some visitors.
- 2. In the **Triggers** group, click **Execute** and the **Execute Trigger Wizard** appears.
- 3. In the wizard, click Next.

| Jisitor & Trigger Select the visitor that you want to use and the trigger that you want to execute. | > |
|---|-------------|
| isitor: | |
| | Select |
| rigger: | |
| | Select |
| | |
| | |
| | |
| | |
| | |
| | |
| < Back Next > | Cancel |
| | cancer |

- 4. In the **Visitor & Trigger** window, in the **Visitor** field, click select and select the visitor that you want to force the trigger for.
- 5. In the **Trigger** field, click **Select** and select the **Trigger** that you want to force for the visitor.



The wizard then displays an overview of the user and the trigger you selected and the rules that it will evaluate.

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6. Click Execute to simulate the trigger. If the visitor meets the conditions specified for the trigger they actions that you have defined are performed for that visitor.



3.4 Moving Visitors in Engagement Plans

In the Supervisor, you can move all the visitors from one state to another state in the same engagement plan or to a state in another engagement plan.

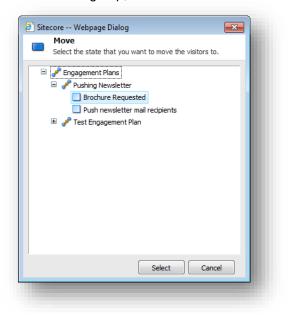
You can also copy a visitor from one engagement plan to another.

3.4.1 Moving Visitors to another State

You can move visitors from one state in an engagement plan to another state in the same engagement plan or to a state in another engagement plan.

To move a visitor:

- 1. In the **Marketing Center**, select the engagement plan that you are interested in and open the **Supervisor**.
- 2. In the **Supervisor**, select the state whose visitors you want to move.
- 3. In the **Visitors** group, click **Move**.



4. In the **Move** dialog box, select the engagement plan and the state that you want to move the visitors to.

When you move visitors to another state in the same engagement plan, they are removed from the state they are currently in and placed in the state you select.

When you move visitors to another state in another engagement plan, they are removed from the state in the current engagement plan and placed in the state you select in the other engagement plan.

Note

A visitor can only be in *one* state in an engagement plan.

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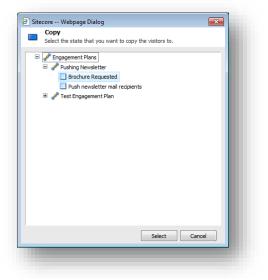


3.4.2 Copying a Visitor

You can also copy a visitor from one engagement plan to another.

To copy a visitor:

- 1. In the **Marketing Center**, select the engagement plan that you are interested in and open the **Supervisor**.
- 2. In the **Supervisor**, select the state that contains the visitors that you want to copy.
- 3. In the **Visitors** group, click **Copy**.



4. In the **Copy** dialog box, expand the engagement plan that you want to copy the visitors to and then select the state that you want to move them to.

You cannot copy visitors to a state in the same engagement plan. A visitor can only be in one state in an engagement plan.

When you copy visitors to a state in another engagement plan, they are *not* removed from the original state.

3.4.3 Deleting Visitors from an Engagement Plan

You can also delete visitors from an engagement plan.

To delete visitors from an engagement plan:

- 1. In the **Marketing Center**, select the engagement plan that you are interested in and open the **Supervisor**.
- 2. In the **Supervisor**, select the state whose visitors you want to delete.
- 3. In the Visitors group, click Delete.



3.5 Monitoring an Engagement Plan

In the Marketing Center you can use the Monitor to get an overview of the engagement plans that you have deployed.

The monitor is a passive tool that is designed to give managers an overview of the engagement plans but not to edit them.

In the Monitor, you can see entire structure of the engagement plan and how many visitors are in each state. You can also see what percentage of the visitors is in each state in the engagement plan.

However, you cannot see the details of any of the states, conditions, and rules that you have defined.

The Monitor does not allow you to add, delete, move, or copy the visitors in an engagement plan.



Chapter 4 Appendix

This chapter contains some other information that may be useful for people who create and use engagement automation plans.

This chapter contains the following sections:

Security Roles and Sitecore Engagement Analytics •



4.1 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 <i>Client Authoring</i> role. | |
| Analytics Maintaining | Access to the Engagement Plan Designer and Supervisor. Requires membership of the <i>Client Authoring</i> 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 <i>Client Authoring</i> 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 <i>Minimal Page Editor</i> 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 <i>Client Authoring</i> 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 <i>Minimal Page Editor</i> 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 <i>Client Authoring</i> role. | |

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