

Sitecore CMS 7.2 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, Dashboards and Analyses

This chapter describes the standard reports that are available in the Engagement Analytics report viewer. It also contains an overview of the Executive Insight Dashboard and Engagement Intelligence.

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1.1 The Sitecore Customer Engagement Platform

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.

The Executive insight Dashboard gives you an overview of the effectiveness of campaigns and marketing channels and the Engagement Intelligence Analyzer gives you a more detailed view of DMS data based on the OLAP cube. In Engagement Intelligence, you can also create your own analyses and get a much more detailed insight into the activities of your website visitors. Analyses enable you to get both an overview and to drill down into your campaign and marketing channels to help you to make informed business optimization decisions about 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

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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 Marketing Center, Engagement Plan Monitor and to the Executive Dashboard. Requires membership of the <i>Client Authoring</i> role.
Analytics Maintaining	Access to the Marketing Center, 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.



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

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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.

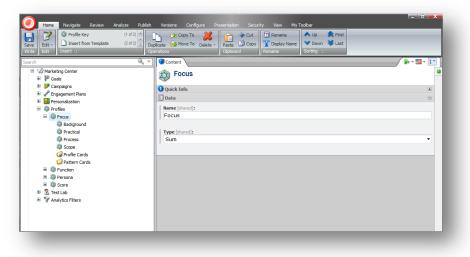


2.2 **Profiles, Profile Keys, and Profile Cards**

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
	lan
	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.

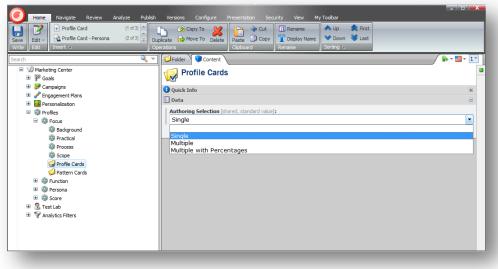
Before you start to create profile cards, you should consider the profiles that are suitable for your website and whether it is appropriate to assign one or more profile cards for each profile to the content items that make up your website. If you decide that it is appropriate to assign multiple profile 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.

ve Edit - ite Edit - Edit - Edit -	Duplicate in Move To Delete Paste Copy T Display Name Own Stats Operations Copy Copy Copy Copy Copy Copy Copy Copy	
arch ⊟ √2 Marketing Center ⊮ № Goals ⊮ ₽ Campaions	OFolder Content Profile Cards	•
 P Engagement Plans 	Quick Info	
Personalization	E Data	Ξ
By Profiles Soperation Soperation	Authoring Selection (shared, standard value): Stecore Webpage Dialog Enter the name of the new item: Decision Maker OK Cance	•
Bi © Persona Bi © Score Bi © Tettab Bi ♥ Analytics Filters		

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.

Home Navigate Review Analyze Publish	Versions Configure Presentation Security View My Toobar Copy To te Wove To Delete Paste Cut Paste Copy To Deplay Name Rename Cupboard Cut Sorting Copy Cut	
	Content	• <u>1</u>
	This media item has no details. Profile Card Value [shared]: Background: 7 Practical: 3	E
at ag score ∰ StetLab ∰ Analytics Filters	Process	



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. 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.

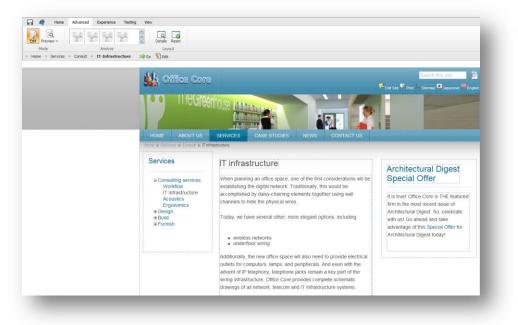


2.3 Assigning a Profile Card to a Content Item in the Page Editor

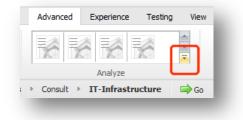
After you have created the profile cards and assigned profile values to them, you can start assigning the profile cards to the content items that make up your website. Assigning profile cards to content items makes it easier for you to implement profile values consistently across your website.

To assign a profile card to a content item:

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



2. On the **Advanced** tab, in the **Analyze** group, to edit all profiles on this page, click the drop down arrow.





3. Then click Edit the profiles.

			4		
Edit Preview -					
Home Services					
)[[(
	Edit the p	profiles.			6

The Profile Cards dialog appears.

Focus	Edit		- 8
Profile	om e keeps the custom key values.		- 1
Function	Edit		- 1
Profile	om e keeps the custom key values.		- 1
Persona	Edit		- 8
Profile	om e keeps the custom key values.		- 1
5core	Edit		- 1
Profile	om e keeps the custom key values.		- 1

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

The **Select Profile Card** dialog looks different depending on which option you selected in the **Authoring Selection** field when you created your profile cards.

The options in the **Authoring Selection** field 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.



Option	Description
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 looks like this:

rofile Cards	Profile Card Details	Customize
Decision Maker		
Office Manager		
	Profile Card Values	
	Backgro	RBq
	0.	80
		80
		40
		20 00 Practical
	Scope VI	Placical
	Proces	55

5. In the **Select Profile Cards** dialog, 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 looks like this:

Profile Cards	Profile Card Details	Profile Card Values	Customize
lame		Background	
Decision Maker		1.00	
Office Manager		0.60	
		0.40	
		0.20	
		Scope 0.00	Practical
	Add >>	Process	
	<< Remove	PTOLONS	
I			

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

rofile Cards	Profile Card Details	Profile Card Values	Customize
ame Decision Maker	Decision Maker	Background 6.0	
Office Manager	Office	5.0 4.0 3.0	
	Manager	2.0 1.0 0.0	Practical
(Add >>]		
_	< Remove	Process	

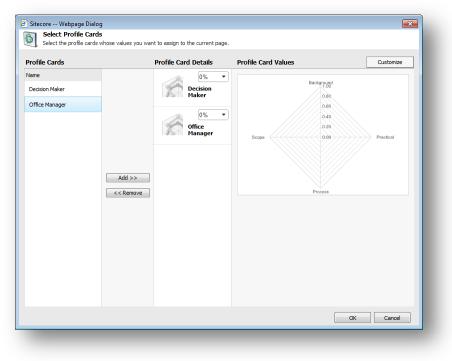


The total value of the all the profile cards that you select is assigned to the content item.

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

rofile Cards	Profile Card Details	Profile Card Values	Customize
ame			
Decision Maker		Background 1.00	
Office Manager		0.80	
since manager		0.40	
		0.20	
		Scope 0.00	Practical
	Add >>		
	<< Remove	Process	

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





8. 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.

ofile Cards		Profile Card Details	Profile Card Values	Customize
ame Decision Maker		60% - Decision Maker	Background	
Office Manager		Plaker	5.0	
		40% • Office Manager	3.0 2.0 1.0 Scope	Practical
	Add >>			
	<< Remove		Process	

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.

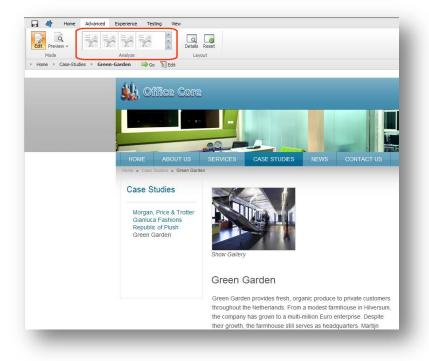
If you decide that Sitecore should recalculate the percentages automatically, it increases or decreases the percentages proportionally.



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

Focus	Edit				
Dec	sion Maker	60%	Office Manager	r	40%
Function	Edit				
Persona	Edit				
Score	Edit				

After you have assigned some profile cards to a page, on the **Advanced** tab, in the **Analyze** group, you can see the profile cards that you have assigned.



The Analyze group now displays an icon for each of the profile cards that you assigned to the page.



When you move the mouse over one of the profile card icons the **Page Editor** displays a tooltip with the name profile card.

Edit Preview +	Analyze	JS Lay	Reset	
Home Case-Studies G	reen-Garden 🛛 🔿 G	o 划 Edit		
		Man Com		
		Hice Core	2	
			- (
	HOME	ABOUT US	SERVICES	CAS
	Home » Case	Studies » Green Gard	len	

2.3.1 Assigning Custom Profile Values to a Content Item in the Page 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 **Page Editor**, navigate to the page or 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.

Profile Cards	Profile Card Details		Customize
Name	Customize		
Decision Maker		riate values to the pro	ofile.
Office Manager			
	Background:	0	•
	Practical:	0	•
	Process:	0	-
	Scope:	0	-
	Profile Card Values		
		Background 1.00	
		0.80	
		0.60	
		0.20	
	Scope	0.00	Practical
		Process	

- 3. In the Select Profile Card dialog, 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.

ofile Cards	Profile Card Details	Customize
ne	Customize	
ecision Maker	Assign the appropriate value	ues to the profile.
ffice Manager		
	Background:	8 👻
	Practical:	7 🔹
	Process:	6 🔹
	Scope:	5 👻
	Profile Card Values	
	Scope CO Process	Practical

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

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

When content authors use the Content 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 Content Editor:

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

Home Navigate Review Analyze	Publish Versions Configure Presentation Security View MyToolbar	
Save Edit - Insert From Template (1 of 1 Save Edit - Insert 10	Image: Copy To Image:	
Search	Content Content Decontent Eye Tea Room	
Gontent Gontent Gontent Gontent Gontent Gontent Gontent Gontent	Q quick Info	
B Bout-Us Gorvices B GOCON	Client Gallery Meta Data Preadcrumb	*
🗈 🚤 Design 🗉 🔩 Build	Menu Governiew	•
 Furnish Case-Studies Eye Tea Room 	Page Title and Text Title:	
Morgan-Price-Trotter Mainluca-Fashions Mainluca-Fashions Mainluca-Fashions Mainluca-Fashions Mainluca-Fashions	Eye Tea Room Show Editor - Suggest Fix - Edit Html Text [standard value]:	
 ₩ News 2 Contact-Us 3 RSS-Feeds W Settings 	Provide your main text here	-
 B ⊆ Layout B ⊆ Media Library B ⊒ System B ≡ Templates 		
🖻 📧 Templates		

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

Profile Car		oot itop	
Click Edit to a	ssign a profile card or change the	ent item. e profile cards that are assigned.	
Focus	Edit		
Function	Edit		
Persona	Edit		
Score	Edit		
		Close Cano	el



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

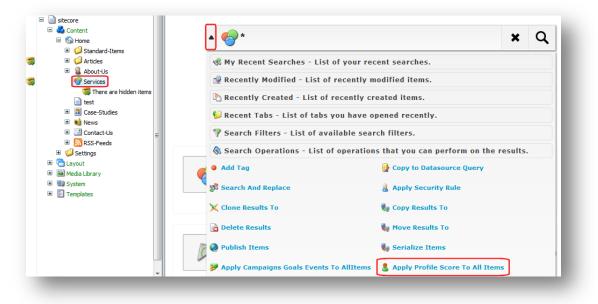
For more information about assigning profile cards, see the section Assigning a Profile Card to a Content Item in the Page Editor.

2.4.1 Assigning Custom Profile Values to Multiple Content Items

In Sitecore search, item buckets, you can use search operations to apply a profile value or set of values to multiple content items. If your website contains thousands or millions of items, these bulk operations enable you to apply changes more quickly.

To assign custom profile values to multiple content items:

- 1. Select a content item or item bucket. For example, **Services**.
- 2. In the search field enter * to return all items in the item bucket.
- 3. Click the drop down to the left of the search field and select **Search Operations**.
- 4. In Search Operations, click Apply Profile Score to All Items to open the Profile Cards window.



5. In the **Profile Cards** window, follow the same procedure as you did to assign values to a single content item. For more information on how to do this see, Assigning Custom Profile Values to a Content Item in the Page Editor.

When you have finished assigning profile values to your profile keys, click **OK** and these values are applied to all the content items that appeared in your search results.



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.

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Search Search	Options Folder Items in the	re
		OK Cancel

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

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

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	Description [shared]:	Ŧ

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 <i>Request for Demo</i> goal is four times more valuable than the <i>Newsletter Registration</i> 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. 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.

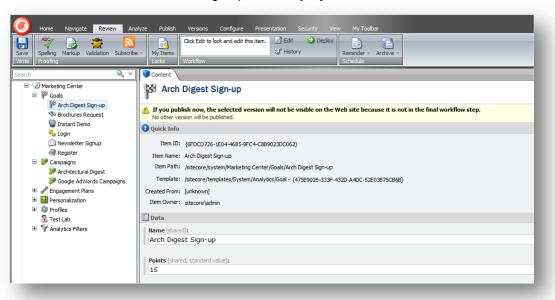
For more information about engagement plans, see the Engagement Automation Cookbook.

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.

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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.

Goals Select the goal that is achieved when a visitor accesses this page. When a visitor completes a goal, this action is called a conversion.
ch Digest Sign-up
ochures Request
stant Demo
gin
ewsletter Signup
egister
OK Cancel

3. In the **Goals** dialog, 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.

3.1.4 Associating a Goal with Media Item

You can associate goals with any type of Sitecore content items. If you have media items such as PDF documents or videos on your website, it may be useful to track how many visitors have downloaded or viewed these media items. View reports to find out how many visitors have downloaded or viewed media items.

Creating a goal to associate with the media item:

- 1. Open the Marketing Center.
- 2. Select Goals.
- 3. In the **Insert** group, click *Goal* to create a new goal item.
- 4. In this example, name the new goal Brochure Download.
- 5. In the **Points** field, enter a value, for example 5.
- 6. Publish and approve in the workflow if you have this enabled.
- 7. In the ribbon, click Save.

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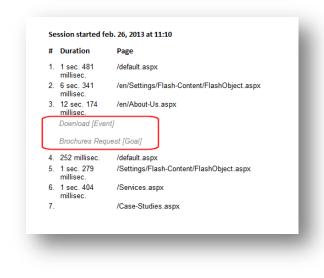
To associate a goal with a media item:

- 1. In the Sitecore Desktop, open the Media Library.
- 2. Navigate or search for the content item you want to track.
- 3. In this example, select the Office Core Design brochure 2011.
- 4. In the ribbon, Analyze tab, Attributes group click Goals.
- 5. In the **Goals** dialog, clear the **Brochures Request** check box and instead select **Brochure Download**.

Content Conten	Sitecore Webpage Dialog Coals Sect the goal that is achieved when a visitor accesses this page. When a visitor completes a goal, this action is called a conversion. Brochures Request Instant Demo Login Newsletter Signup Register
Information	
Title:	
Keywords:	OK Cancel

6. In the Media Library ribbon, click Save.

Now every time a visitor opens the Office Core Design brochure 2011 PDF this triggers a goal conversion event in Engagement Analytics that is recorded in the Visits Detail (Session) report.





3.1.5 Associating a Campaign or Event with Multiple Content Items

Using item buckets and Sitecore search, you can carry out bulk actions on multiple content items, such as, associating a campaign, page event, failure action or other setting on multiple content items. To do this, in item buckets you can use one of the operations available under Search Operations.

To apply a campaign to multiple content items:

- 1. Search for the items you want to perform an action on. For example, you could have an item bucket containing multiple products or news articles and you want to link all these products or news articles to a specific campaign.
- 2. Select an item bucket and enter * in the search field to return all the items contained in this item bucket.

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3. Click the drop down next to the search field to see more search options that you can apply to your search results.



4. In the search options, click **Search Operations** to display a list of the actions to apply to your search results.

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		Recently Modified - List of rece	ntly modified items.	
		Recently Created - List of recen	ntly created items.	
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- 5. Click Apply Campaigns or Events to all items to open the attributes dialog.
- 6. In the **Attributes** dialog, select a campaign or event that you want to associate the items in your search results with. In this example, select the campaign *Office Core Promotional Campaign*.

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• @ *	Attributes Select the analytics attributes that are associated with this page. Analytics attributes help build a more comprehensive picture of the vistor's behavior as they navigate through your Web site.	
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8	Select the associated campaigns.	
	Office Core Promotional Campaign	
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7. Click **OK**. The campaign is now associated with all the items in your search results.



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

In the Executive Insight Dashboard, you can view charts that show which of your campaigns are the most successful. You can then improve or drop unsuccessful campaigns and improve your ROI.

For more information on the Executive Insight Dashboard, see Viewing Campaign Categories in the Executive Dashboard.

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

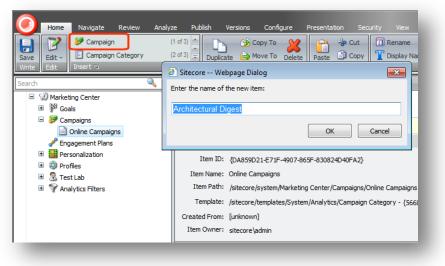
When you create a campaign, you first need to create a campaign category. Campaign categories enable you to categorize your marketing campaigns. In the Executive Insight Dashboard, you can view each campaign and campaign category using the *All campaigns* drop-down list.

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, for example, Online Campaigns and click OK.
- 3. Select the *Online Campaigns* category and then on the **Home** tab, in the **Insert** group, click *Campaign* to create a new campaign item



4. Give your new campaign a name, for example, Architectural Digest and click OK.



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

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in Y Anaytis Hitrs	Campaign Link (hared): sc_camp=7147FC33D65741B78CF354926779C1AE Type (dwred): Edit Enroll in Engagement Plan (dwred):		
	Traffic Type	-	



Field	Value	
Title	The title of the campaign.	
Campaign Link	The campaign query string. For example: sc_camp=7147FC33D65741B78CF354926779C1AE Append the query to the link to your website provided on t sponsored site. If the link already includes a query string, prefix the provided text with an ampersand (&). If the link does not include an existing query string, prefix the text w a question mark (?). This ensures that site visits generated by this campaign a recorded in the analytics system.	
Туре	A campaign can either be 'online' or 'offline'.	
Enroll in Engagement Plan	Select the engagement plan state that you would like to assign visitors to when they participate in this campaign.	



Change Traffic Type (for every visit that triggers this campaign)For each visitor that triggers this campaign, you can whether the traffic type allocated to the visit should changed or allocated automatically. You can select one of three options:Change Traffic Type?DescriptionNoDo not change the t that is automatically assigned.Yes - if this campaign is triggered on the landing page.If this campaign is to on the landing page change to the traffic	d be
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A visitor might come from a paid Google AdWords to reach your page. If you select 'No' in this field, t visit will automatically be put into the Search Engin Organic or Search Engine – Organic Branded cate This is incorrect as you want this visit to be classifi 'Paid'. To ensure that this visit is always classified as the traffic type select 'Yes – if this campaign is triggere landing page' and then select traffic type as 'Paid'.	then the ne – egory. ied as ' <i>Paid</i> ed on the
 Example 2. A visitor might come from an email campaign that to reach your page. If you select 'No' in this field, t visit will automatically be put into the Referred - Or category. This is incorrect as you always want this classified as 'Email'. To ensure that this visit is classified as the Email to select 'Yes – if this campaign is triggered on the lapage' and then select traffic type as 'Email'. 	then the ther s visit to be traffic type
Select Traffic Type To specify which traffic type to change a visit to, set the options in this drop down.	elect one of
	elect one of



Field	Value
Cost	The total cost of your campaign. You can enter values into the <i>Cost, Cost Base, Cost per</i> <i>Click</i> and <i>Cost per Day</i> fields to keep a record of the costs incurred for an individual campaign. To extend this functionality further you could create a custom report to display a breakdown of costs incurred for each campaign. These fields appear in the Analytics database, so could be used in SQL queries that would help you to calculate a more accurate ROMI.
Cost Base	If the campaign has a fixed one off price. For example, a fixed price banner campaign.
Cost per Click	For a campaign with a fixed click fee such as a banner ad it is possible to calculate the cost per click of each visit. This is more difficult for campaigns such as Google AdWords as these campaigns can have a variable cost per click.
Cost per Day	You may have an ad that incurs a cost on a daily basis regardless of how many times a visitor clicks on your ad.
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.

Important

You must deploy a campaign in the workflow before you can 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

After creating a campaign in the Marketing Center, you must ensure that the campaign is triggered in Sitecore Analytics so you can track which campaigns your site visitors have come from.

To associate a campaign with a content item:

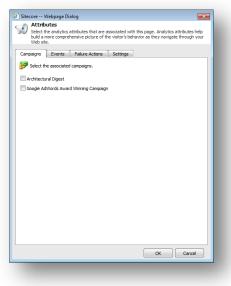
1. In the **Content Editor**, expand the content tree and navigate to the content item that you want to associate a campaign with.

In this example we are using a landing page.

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



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

Online Campaigns

An online campaign consists of a campaign definition item and a campaign event. To associate an online campaign with a content item, you must copy the campaign query string to the sponsored site and if necessary edit the query string to point to a page on your website.

To associate an online campaign with a content item:

- 1. Open the Marketing Center.
- 2. Expand the Campaigns node and then click Google AdWords Award Winning Campaign.

Home Navigate Review Analyze Publich	Versions Configure Presentation Security View My Toolbar Click Edit to lock and edit this item. P History Workflow
Search 🔍 👻	Content Google AdWords Award Winning Campaign
Campaigns Gonine Campaigns Provide Campaigns Provide Campaigns	Quick Info
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 B Profiles B Test Lab B ♀ Analytics Filters 	Campaign Link [shared]: sc_camp=568FCFF143384BE4A25DDFF1B3A24DFB
	·

- 3. In the **Campaign Link** field, copy the query string.
- 4. Paste the query string to your sponsored site.

This example uses a Google AdWords campaign.

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5. Paste the campaign query string into your sponsored site.

Enterprise-class, 1600+ customers Leading Choice for Marketers and IT	Enterprise-class, 1600+ customers
www.sitecore.net	Leading Choice for Marketers and IT
	www.sitecore.net
	http:// v/default.aspx?sc_camp=664CF853765
	Save Cancel

You must append the query string to your site URL. In this example the website URL is:

www.sitecore.net/default.aspx

The query string provided for this campaign is:

sc camp=E0E6A1A02F5342F1BC30DABCC3670A20

6. After you insert the query string, you must insert a question mark to complete the path, as this is not included in the **Campaign Link** field:

www.sitecore.net/default.aspx?sc camp=E0E6A1A02F5342F1BC30DABCC3670A20

7. By default the campaign query string links to your home page. To point to a different page, you must edit the query string.

For example, you could replace /default.aspx? with /Our-Services.aspx?

ttp://	*	www.sitecore.net/default.aspx?sc_c
Save) (Cancel

When a visitor comes to your website from this campaign, a campaign event is triggered in Sitecore Analytics, and this is recorded in the *Latest Visits* report.

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, expand the *Recent Activities* node and then click *Latest Visits*.

Site Health Secent Activity Latest Visits	Print Save i 4 Page 1 of	1 🕨 🕅 🔍 1009	6 👌 Whole F	Report MailReport
	Latest Visits			Date Range: maj. 27, 2011 - jun. 03, 2011 Report Generated: jun. 03, 2011
	Report description			
	Organization	Value	Visit #	Date & Time
	1. IP_NOT_FOUND(N/A) Classify / Subscribe / CRM	105	1	2011-06-03 07:29
	2. IP_NOT_FOUND(N/A) Classify / Subscribe / CRM	45	1	2011-06-03 07:22

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.

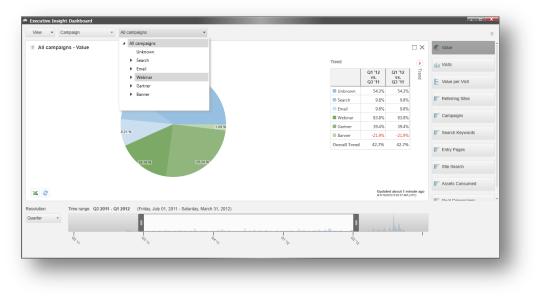
For more information about the reports that are available in the **Engagement Analytics** dialog, see the *Marketing Operations Cookbook*.

3.2.4 Viewing Campaign Categories in the Executive Dashboard

You can use the Executive Insight Dashboard to view information about each campaign category.

To view campaign categories in the Executive Insight Dashboard:

- 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 category.



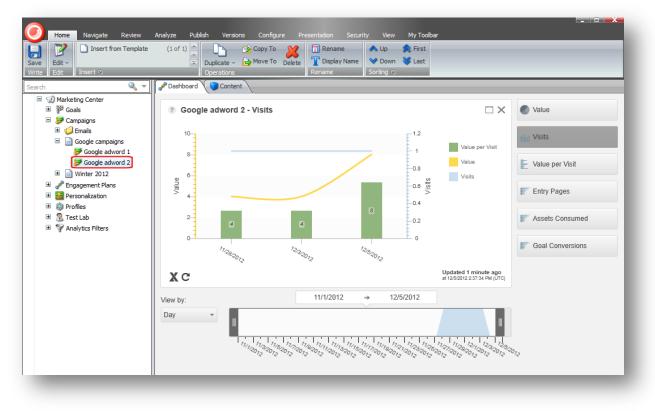


- 3. Select Campaign in the first top drop down box.
- 4. In the second drop-down box, select a campaign category.

3.2.5 Viewing the Executive Insight Dashboard from the Marketing Center

In the Sitecore Desktop, Marketing Center, you can also view campaigns or campaign categories in an embedded Executive Insight Dashboard.

A Google AdWords campaign Dashboard tab viewed from the Marketing Center:



To view an embedded campaigns dashboard:

- 1. In the Sitecore Desktop, open the Marketing Center.
- 2. Expand a campaign category and click on a campaign.

In the **Content** area, to the right of the content tree, a **Dashboard** tab starts loading.

3. If there is no data available for the campaign then you will see an error. If you are expecting to see data then click **Reload data** to get the latest data available or wait until the cache has been cleared.

The **Dashboard** tab can only display the Executive Insight Dashboard if your campaign landing page has had one or more visits. If you still cannot see any campaign data check the configuration of your campaign landing page and view the Engagement Analytics, Visit Detail (Session) report to find out if your campaign has been triggered.

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

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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.

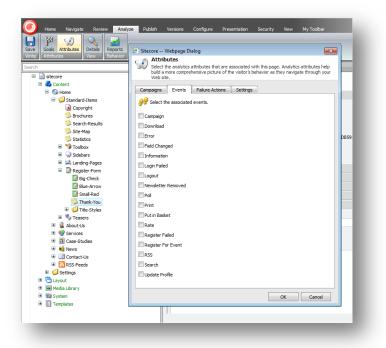
You can create engagement plans that use events to evaluate what action should be taken. For more information about engagement plans, see the *Engagement Automation Cookbook*.

3.3.1 Associating an Event with a Content Item

You can associate events with single content items or use search operations to assign events in bulk to multiple 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. On the Analyze tab, in the Attributes group, click Attributes to open the Attributes dialog.



- 3. In the **Attributes** dialog, 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.



3.3.2 Assigning Failure Actions to Items

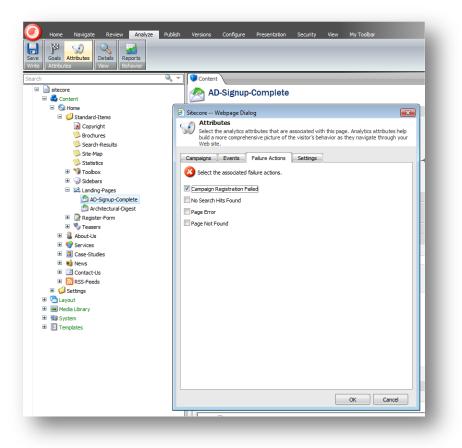
Failure actions are another type of event. Normally page failures are recorded programmatically. You can, however, use failure actions to record any page failures that occur on the website.

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.

You can associate failure actions with single content items or use search operations to assign failure actions in bulk to multiple content items.

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. On the Analyze tab, in the Attributes group, click Attributes to open the Attributes dialog.



- 3. In the **Attributes** dialog, 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.

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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.

Home Navigate Review Analyze Home Navigate Review Analyze Save Goals Save Version Save Version Save Version Write Version Version Behavior	Publish Versions Configure Presentation Security View MyToolbar
Gotent Goten	Sitecore Webpage Dialog Attributes Select the analytics attributes that are associated with this page. Analytics attributes help web site. Campaging Events Failure Actions Settings Select the appropriate settings. Disable Analytics for this Page If you disable analytics for this page, Sitecore will not register information when visitors access this page.
	OK Cancel

- 3. In the **Attributes** dialog, 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.



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.

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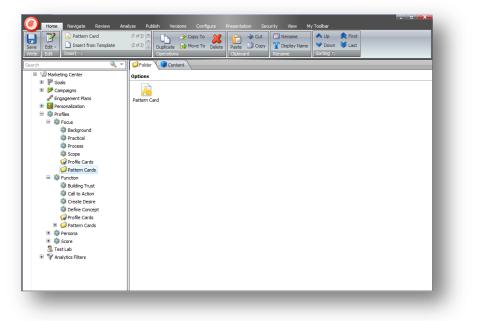
4.2 Creating a Pattern Card

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.

ave Goals Attributes Details Reports		
rite Attributes View Behavior	Content Reports X	- 1-
wch v Image: State of the	Content Reports X Data Name [shared]: Description: The people who make the important decisions in an organization. Take Screenshot + Browse + Open Media Library + Edit Image + Clear + Refresh Image [shared]: This media item has no details. Pattern [shared]: Badground: Practical: Process: Scope: S	

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.

Your 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.*

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Chapter 5 Testing

This chapter explains how to create and run multivariate (MV) 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 •
- Creating a Page Level 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.

You can create an MV test in the Content Editor and the Page Editor, however, the Page Editor is the most convenient and flexible tool to use, because it lets you to use existing content or create new content 'on the fly' without leaving your website.

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.
- Clone a content item duplicate existing test variations.
- Create new content create new test variations 'on the fly'.
- Change a component in the test change the rendering or sublayout of the test variation.
- Hide a component in the test create a test variation that hides the entire component.
- Create a combination test select multiple content items on the same page and test them using a combination test.



5.2 Creating a Multivariate Test in the Page Editor

In this example, you create a multivariate test for the English version of a newsletter register form. Visitors to your website enter their email address on this form to register for an email newsletter. Test three different combinations of text and graphics to find out which generates the highest engagement value on the website and is the most effective.

When the test is finished, you can see each test variation and the accumulated value next to each one and pick the winning content. When you choose a winner, consider the effect that the test had on the overall engagement value generated on the website – did the winning content led to higher engagement values overall or just in relation to the goal assigned to the test variation?

To create a multivariate test in the Page Editor:

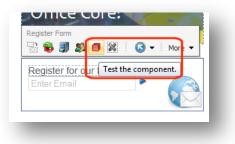
- 1. Open the Page Editor.
- 2. On the **Experience** tab, select the language version that you want to create the test for.



Important

When you run an MV test on a component, you should only run the test in one language version at a time. If you run the same MV test in multiple languages at the same time, the variation that you first select as a winner is also selected as the winner in all the language versions that you have run the test on.

3. Select the component on your website that you want to test and in the floating tool bar, click the **Test** button **I**.



- 4. In the **Test the Component** dialog, click **New Variation** to create a new test variation.
- 5. Specify the content for the variation:
 - \circ To browse for existing content in the content tree, click the **Browse** button \square .
 - To hide the component, select Hide Component.

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• To test the design of the entire component, select the **Enable variation of component design** check box. Then click the **Browse** button to choose a different design.

http://cms65rev110519/sitecore/shell/default.as	px?xmlcontrol=Sitecore.Shell.Applicati 🏠
Test the Component Define the variations that you want to use in the r	nultivariate test.
nable variation of component design.	New Variation
ariation Name	Actions 👻 🙈
it Content Item: /Slue-Arrow	Hide Component
	OK Cancel

6. In this example, click the **Browse** button to locate the test content items in the Sitecore content tree. To search for the item you want to add to the test, click **Search for Content**.

Sitecore - Mozilla Firefox	Search this site
	lefault.aspx?xmlcontrol=Sitecore.Shell.Applic: 🏠 🛛 Edit Site 💆 Print 🔞 Sitemap 🎑 Japanese 🕮 English
Test the Component	
Define the variations that you wa	Int to use in the multivariate test.
Enable variation of component design	New Variation
Variation Name	Sitecore - Mozilla Firefox
Test Content Item:	/sitecore/shell/default.aspx?xmlcontrol=Sitecore.Shell.Applicat 🏠
Blue-Arrow	Select the Associated Content
	Select the content that you want to associate with the rendering and use as the data source.
id	Select an existing content item.
	B istecore
d	Select Existing Gontent
	E G Home
	🖾 🗐 🖓 Standard-Items
	Search for Content
	Search for Content Brochures =
	Site-Map
	Statistics
	Clone Current II Toolbox
	Content 🕀 🥥 Sidebars
£.,	🖽 🔀 Landing-Pages
	🖃 🗋 Register-Form
	Create New Content
	Bue-Arrow Small-Red
ir	Mainted Stank-You
	🗷 🥥 Title-Styles 🔹
e	
	OK Cancel
Gianiuca Fasilions,	
untraditional startups like	with a site audit, agree on Subscribe to our Newsletter
Republic of Plush, and	resources and goals, use
industry leaders in renewable	



7. In this example, select three variations of the Register Form control from the **Standard Items** folder. Enter a name for each test variation that you add. For example, *Blue-Arrow*.

	Test the Component Define the variations that		multivariate
En En	able variation of componer	nt design.	_
Blu	e-Arrow		
Test	Content Item:		
	/Blue-Arrow	X	
	-		_

- 8. In the **Test the Component** dialog, when you have added all your test variations, click **OK**.
- 9. Save your changes.

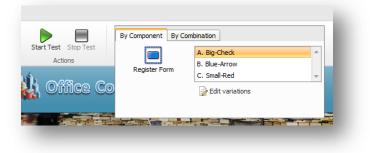
In the Page Editor, you can preview each of your test variations before you run the test.

To preview your test:

1. In the **Page Editor**, select the component you are testing. In the floating toolbar use the up and down arrows to preview each test variation.

B 🛞 🕱 🕸	0 0 -	More 🔻	
A 🗘 Small-Re	ed	•	
3et our Newsletter	Enter Email		
D		6	23

2. On the **Testing** tab, in the **Components and Combinations** section, click the drop-down arrow to get an overview of all the components and combinations in your test.



5.2.1 Associating a Goal with an MV Test

In Engagement Analytics, goals enable site visitors to accumulate value. You can decide which variation of the test variations is the most successful by the value it has accumulated during the test.

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To measure the effectiveness of an MV test using engagement value you must first associate a goal with your test. The goal must also have points allocated to it. In this example, associate the *Register* goal and allocate 5 points.

To associate a goal with an MV test:

1. In the Content Editor, select one of the content items that you are using in your test. In this example, select the *Blue-Arrow* Register Form control.

Home Navigate Review Ana	lyze Publish Versions Configure	B Sitecore Webpage Dialog
Save Attributes View Behavior		Goals Select the goal that is achieved when a visitor accesses this page. When a visitor completes a goal, this action is called a conversion.
Search Querch Q	Content Content Current Cur	OK Cancel
 Image: Barbon Studies Image: Image: Im	Dimensions: 16 x 16	
H Cottines	Dafe de Alexander Tarrie (D. Larrie)	

- 2. On the Analyze tab, in the Attributes group, click Goals.
- 3. Check the **Register** check box.
- 4. Click **OK** and repeat this process for all the content items that you use in your test.
- 5. Save your changes.

To allocate points to a goal:

- 1. In the Marketing Center, select a goal. In this example, the *Register* goal.
- 2. In the **Points** field, enter 5.

☑ Marketing Center □ 🏴 Goals	Register
Srochures Request	Quick Info
🖳 Instant Demo 🗞 Login	Data
Newsletter Signup	Name [shared]: Register
E Second Campaigns	
ngagement Plans	Points [shared]:
🗉 🚂 Personalization	5
🗉 🔕 Profiles	



3. Click Save.

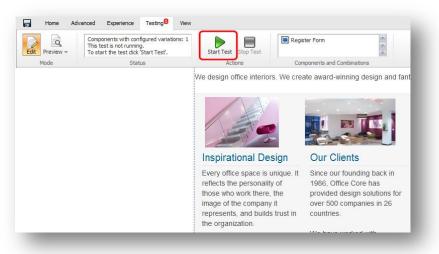
When you run the test, every time the register form is submitted by a visitor, 5 points are added to the engagement value generated for the test variation that the visitor used.

5.2.2 Starting an MV Test in the Page Editor

Now that you have created the MV test and associated goals to the content items in your test, you can start the MV test. If the components in your test contain personalization, this will be paused while the test is running.

To start a multivariate test in the Page Editor:

1. In the **Page Editor**, navigate to the page where you have created a test, click the **Testing** tab and in the **Actions** group, click **Start Test**.



Note

After you start the test, you cannot modify the test. For example, you cannot add or edit the test variations or the components that you are using in the test.

2. In the **Start the Test** dialog, enter a name for the test and click **Start the Test**.

Sitecor	re - Mozilla Firefox
	http://cms65rev110519/sitecore/shell/default.aspx?xmlcontrol=Sitecore.s 🏠
	Start the Test
	Do you want to start the test for this page? When the test is running, you cannot edit the components that are used in the test.
Test ti	te:
Reg	ister Form test
	Start the Test Cancel
-	

3. Perform a site publish to publish the test to your website. Open the **Publish Wizard** and choose **Smart publish**.

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When the test has run for the required time, you can choose the winner.

To choose a test winner:

- 1. Open the **Page Editor** and navigate to the page where the MV test is running
- 2. Click the **Testing** tab and then click **Stop Test**.

In the **Stop the Test** window, you can view all the components in your test and each possible combination. You can also see the value that is generated by each variation.

Sitecore - Mozilla Firefo	x	×
http://cms65rev11	10529/sitecore/shell/default.aspx?xn	nlcontrol=Si 🏠
configured variat	e test, each component will only displa- tions. Select the desired variation or cor	
By Component By Co	mbination	1
	A. Big-Check	0 ^
Register Form	B. Blue-Arrow	60
	C. Small-Red	20 👻
Stop test and revert to	original design. Select	Cancel

Note

If you do not see any results in the **Stop the Test** dialog it may be because the test statistics cache has not expired. By default the test statistics cache is set to expire after 1 hour. The following setting in the web.config file sets the cache expiration: WebEdit.TestStatisticsCacheExpiration. The default setting is 01:00:00 (1 hour). To see instant test results ask an administrator to change the default setting to 00:00:00.

3. Choose a winning test variation and click Select.

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

4. To publish the winner to your website, you must perform a site publish.

5.2.3 Testing Combinations of Content in the Page Editor

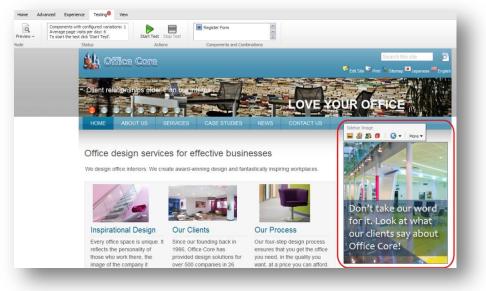
You can add more than one component to a multivariate test so that you can decide which combination of controls works best on a page.

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, add several test variations by following the same steps as described in the previous section. For example, choose several different sidebar images to appear in the *Sidebar Image* control.

Sitecore - Mozilla Firefox	🖾 📑 Sitemap 🎑 Japanese 🕮 English
Sitecore/shell/default.aspx	x?xmlcontrol=Sitecore.Shell.Applic: 🏠
Test the Component Define the variations that you want to use in	the multivariate test.
Enable variation of component design.	Sitecore - Mozilla Firefox
Variation Name	/sitecore/shell/default.aspx?xmlcontrol=Sitecore.Shell.Applicati
Test Content Item:	Select the Associated Content Select the content that you want to associate with the rendering and use as the data source.
	Select an existing content item.
	Select Existing
	Content Case-Studies-TestA
	Case-Studies-TestC
	Cite-to-Contact-Us
	Click-to-Contact-Us
	Clone Current
	Content
	Create New Content
на знатирэнке	w
of Plush, and resources and goa	
aders in renewable advanced compute like Green Garden. design technology	



- 4. Save your changes.
- 5. In the **Page Editor**, on the **Testing** tab, click **Start Test** to run the test.
- 6. Perform a site publish to publish the test to your website. Open the **Publish Wizard** and choose **Smart publish**.
- 7. 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.

	By	Component By Com	bination		
Start Test Stop T	'est #	Register Form	Sidebar Image	Value 🔺	-
Actions	10	Blue-Arrow	Contact	20	
	1	Big-Check	Test A	0	E
ice Core	2	Big-Check	Test B	0	-
	3	Big-Check	Test C	0	
	4	Big-Check	Test D	0	
onships olde	5	Big-Check	Contact	0	1
ghan pa pide	6	Blue-Arrow	Test A	0	Control A
	7	Blue-Arrow	Test B	0	
	1	Stop the test and pick	the winners.	0	
ABOUT US	SERVICE	S CASE S	TUDIES NEWS	COI	NTACT U

- 8. When the test has run for long enough, click **Stop Test**.
- 9. In the **Stop the Test** dialog, there are two tabs that present you with two ways to evaluate the test:
 - **By Component** Choose the winning components for each control separately and click **Select**.

] http://			5
Stop the To After you stop Select the des	est the test, each component will only display or red variation or combination.	ne of the configured varia	tions.
By Component By	Combination		
	C. Test C	0	
Sidebar Image	D. Test D	0	
Sidebai Illidge	E. Contact	6.67	-
	A. Big-Check	0	*
	B. Blue-Arrow	20	
Register Form	C. Small-Red	0	-



• **By Combination** — Choose the winning combination of controls and click **Select**.

5	Stop the Test After you stop the test, each Select the desired variation of	component will only display one of the r combination.	configured variations.
By C	Component By Combination		
#	Register Form	Sidebar Image	Value 🔺
10	Blue-Arrow	Contact	20
1	Big-Check	Test A	0
2	Big-Check	Test B	0
3	Big-Check	Test C	0
4	Big-Check	Test D	0
5	Big-Check	Contact	0
6	Blue-Arrow	Test A	0
7	Blue-Arrow	Test B	0
8	Blue-Arrow	Test C	0
9	Blue-Arrow	Test D	0
11	Small-Red	Test A	0
12	Small-Red	Test B	0
13	Small-Red	Test C	0
14	Small-Red	Test D	0
15	Small-Red	Contact	0
Stop	o test and revert to original desig	gn. Selec	t Cancel

Every goal on the website has a numerical value. When a visitor accesses a test control that has a goal associated with it, the content accumulates a score for the visit.

Engagement Value = Value per visit

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.

10. To publish the winner to your website, you must perform a site publish.

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 existing content, or create new content items to use as test 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 use cloning to 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.

To clone Sitecore content for MV Tests using the Page Editor:

1. In the **Page Editor**, on the **Experience** tab, select the language version that you want to create an MV test for.



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



- 3. In the floating toolbar, click the **Test** button \blacksquare .
- 4. In the **Test the Component** dialog, click **New Variation** to add a test variation.

Test the Component Define the variations that you want to use in the multivariate test	
Enable variation of component design.	New Variation
Variation Name	Actions 🔻 🙈

5. 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



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

More 🕶	I /sitecore/shell/defau	lt.aspx?xmlcontrol=Sitecore.Shell.Applic: 🏠 Site ¹⁰⁰ Print 🔋 Sitemap 🔍 Japanese
onships older the	Test the Component Define the variations that you want to Enable variation of component design. Variation Name	Sitecore - Mozilla Firefox Image: Select the Associated Content Select the Associated Content Select the content that you want to associate with the rendering and use as the data source. Select the content that you want to associate with the rendering and use as the data source.
ABOUT US SE	Test Content Item:	Select an existing content item.
sign services	Test Content Item:	Search for Content
nal Design		Cone Current Content C
space is unique. It ersonality of which there, the company it and builds trust in ion.		
re drawn to the eather or rour planet,		OK Cancel

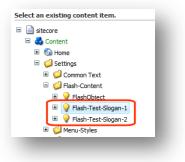
7. To create a clone from the *Flash Object* item, select *FlashObject* and click **Clone Current Content**.



- 8. Make two clones and save them under the Flash Content folder. Give them the following names:
 - o Flash-Test-Slogan-1
 - o Flash-Test-Slogan-2



You now have three Flash objects in the content tree.



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

Enable variation of component design.	New Variation
Free Web Solutions	Actions 🔻 🙈
est Content Item: 💡/Flash-Test-Slogan 1 🛛 🗶	Hide Component
Compelling Web Solutions	Actions 🔻 🙈
est Content Item: ,Filash-Test-Slogan2 X	Hide Component
emove All and Close	OK Cancel

10. Save your changes.

Add the text that you want to appear on the website for each test variation:

- 1. Select the text that you want to edit on the home page banner.
- 2. In the floating toolbar, use the up and down arrows to select each test variation 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 Web 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 **Testing** tab, click **Start the Test**.



- 6. In the Start the Test dialog, enter a name for your test and click OK.
- 7. Perform a site publish to publish the test to your website. Open the **Publish Wizard** and choose **Smart publish**.
- 8. When you have run the test for the required amount of time, select a winner in the **Stop the Test** dialog and publish it to your website.

To test the effectiveness of this MV test you can assign goals to your test variations and measure the engagement value that each slogan generates on your website.



5.3 Creating a Multivariate Test in the Content Editor

You can also create an MV test in the Content Editor. In this example, you create a multivariate test for a newsletter register form using the Content Editor.

Important

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. Therefore, you should create and run all MV tests from the Page Editor.

To create a multivariate test in the Content Editor:

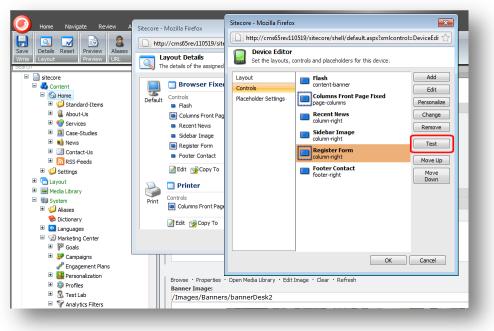
- 1. Open the **Content Editor** and select a content item, for example, *Home.*
- 2. Specify which language version of the item that you want to create a test for. Click the **Language** button in the top right corner and choose the language in the drop-down menu.

	English : English
=	1 version.
	Danish : dansk
	1 version.
	Japanese (Japan): 日本語 (日本)
	1 version.
	German (Germany) : Deutsch (Deutschland)
	1 version.
M	ore Languages

- 3. Click the **Presentation** tab, and in the **Layout** group, click **Details**.
- 4. In the Layout Details dialog, in the Browser Fixed section, click Edit.



5. Click Controls and select a suitable control. For example, Register Form.



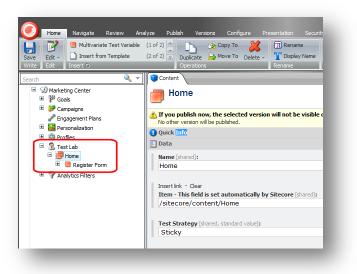
- 6. Click **Test**, to open the **Test the Component** dialog.
- 7. Click **New Variation**, to add each of your test variations.
- 8. When you have added all your test variations click **OK**.

http://	🏠
Test the Component Define the variations that you want to use in the multiv	variate test.
Enable variation of component design.	New Variation
Small-Red	Actions 👻 🙈
est Content Item:	
∑ …/Small-Red X …	Hide Component
Blue-Arrow	Actions 👻 🙈
est Content Item:	
∑ …/Blue-Arrow X …	Hide Component
Big-Check	Actions 🝷 🙈
est Content Item:	
📓/Big-Chedk 🤐	Hide Component
	OK Cancel



The MV test is now created. To run the test, go to the Marketing Center.

1. Open the Marketing Center, and in the content tree, select **Test Lab** and then select the *Home* test definition item.



In the Test Lab, the test definition item and the test variations have been added automatically.

- 2. Select your test definition item, in this example *Home*, and in the **Data** section, specify the test strategy:
 - o Sticky the same test variation is always displayed for the same visitor.
 - Random a new test variation is displayed at random every time the webpage is loaded.
- 3. Save your changes.
- 4. On the **Review** tab, in the **Workflow** group, click **Deploy** to run the test.

Home Navigate Review Ana Home Navigate Review Ana Proofing Markup Validation Subscribe Proofing	Alyze Publish Versions Configure Presentation Security View My Toolbar Image: Click Edit to lock and edit this item. <th< th=""></th<>
Search	Content Home If you publish now, the selected version will not be visible on the Web site because it is not in the No other version will be published. Quick Info Data Name [shared]: Home Insert link · Clear Item - This field is set automatically by Sitecore [shared]: //sitecore/content/Home Test Strategy [shared, standard value]: Sticky



- 5. Perform a site publish to publish the test to your website. Open the **Publish Wizard** and choose **Smart publish**.
- 6. To end the test, when the test have run for the appropriate time, on the **Review** tab, in the **Workflow** section, click **End Test**.

nis item.	🛃 Edit	End Test	3
	I History	1	Reminde
_	_		Schedule



5.4 Creating a Page Level Test in the Content Editor

If you want to test a whole page and not just a single component (rendering) on a page, you can create a page level test. This is an appropriate strategy for testing landing pages.

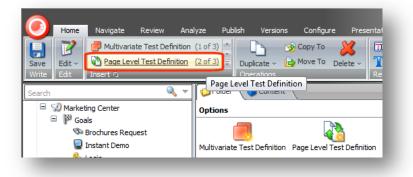
Important

There are no default reports or statistics available yet for choosing the winner of a Page Level Test.

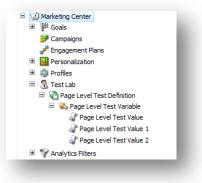
The following example uses *Office Core* and the *Architectural Digest* campaign landing page. A marketer wants to test 3 different versions of the same landing page to find out which is the most effective. To create this test you need three alternative landing pages for the *Architectural Digest* campaign.

To create a page level test:

- 1. Open the Marketing Center and click **Test Lab**.
- 2. Create a *Page Level Test Definition* item. On the ribbon, click the **Home** tab, and in the **Insert** group, click **Page Level Test Definition**. Keep the default name for this item.



- 3. With the *Page Level Test Definition* item selected, create a **Page Level Test Variable** in the same way.
- 4. With the Page Level Test Variable item selected, create 3 new empty Page Level Test Values.

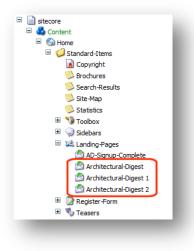


To create three variations of the landing page to use in the test:

- 1. Open the Content Editor.
- 2. In the **Standard Items** folder, select the *Architectural Digest* landing page item in the language version that you want to run the test on.



- 3. Create two new copies of this page below the Architectural Digest landing page item.
- 4. Name the first item Architectural-Digest 1 and the second item Architectural-Digest 2.



In this example, create a URL alias for each copy of the *Architectural Digest* page for verification purposes. With a unique path to each landing page you can test that the test is set up correctly.

5. Select the *Architectural Digest* page, click the **Presentation** tab and in the **URL** group, click **Aliases** and enter an alias for the page. Repeat this step for all tree pages.



- 6. Edit the campaign text or add an image so that the landing page look different from the original design.
- 7. Save your changes.

To configure and test the page level test:

- 1. Open the Content Editor.
- 2. In the Content tree, click System/Marketing Center/Test Lab and select the Page Level Test Definition item.
- 3. Select the test strategy. In the **Data** section, in the **Test Strategy** field, choose *Random* as the strategy for this example.
- 4. Link each of your test values to the pages you want to test. To do this, select one of your test values that you created and then in the **Datasource** field, enter the path to the content item you want to link it to. Use the **Insert link** button or enter a path manually. Repeat this procedure for



each of your test values.

 Page Level Test Value 1 Page Level Test Value 1	Statistics	▲ Content
 Landing Pages A Sonyup-Complete A cohicture 3 Digest 1 Test are in a fame (shared): Arch digest 1 Test are in a fame (shared): A divance A divance A divance A page arance Help Test are in a fame (shared): A divance Test are in a fame (shared): No layout specified] Test are in a fame (shared): No layout specified]		Derte Level Test Velve 4
Ad-Sgrup-Complete Ad-Sgrup-Complete Ad-Additectual Object 1 Advance Advance <tr< td=""><td>-</td><td>Page Level Test value 1</td></tr<>	-	Page Level Test value 1
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Image: Advitectural-Digest 1 Image: Advitectural-Digest 2 Image: Advitectural-Digest 2 <t< td=""><td></td><td>G Quick Info</td></t<>		G Quick Info
Image: Indexed Street Image: Index I		🗊 Data
Arch digest 1 Arch		Name [chared]
Image: Services Image: Service	Architectural-Digest 2	
# ▲ About-Us # ◆ Services # ◆ Services # ○ Conset-Uses # ○ Conset-Us # ○ SetFreds # ○ SetFreds # ○ SetFreds # ○ Loyout # ○ Marketing Center # ○ Compaigns # ○ Compaigns # ○ Compaigns # ○ Compaigns # ○ Proofies ● ○ Testude ● Proofies ● ○ Testude ● Proofies ● Proofies <tr< td=""><td>Register-Form</td><td></td></tr<>	Register-Form	
About-ls	🗉 🍕 Teasers	Topert link + Clays
 I Stockes I Contact-Us I Contact-Us<td>🗷 🌡 About-Us</td><td></td>	🗷 🌡 About-Us	
	🗉 🎯 Services	
B	Case-Studies	, sice core, container nome, o canadra ream, canadra r ages, in a neocrarar bigose r
B Pass Freeds B Pass Freeds B Pass Passes Controls Profiles	🗉 📦 News	
B Settings B Setings B Settings B Setings B Seting B Setings B Setings B Setings B Setings B S	Contact-Us	👌 Advance
	RSS-Feeds	Appearance
Image: Street Stree	Gettings	(a) Help
B Media Library B Media Library B Alases Control [No layout specified] Control Control B Control B Control B Control Control Control Ponders Control B Personalization B Profiles Control Control Ponder [No layout specified] Control Control Pint [No layout specified] Control Control [No layout specified]	🗉 🔁 Layout	
B System B System B Abases Control Normaling specified] Control Default B Compaigns Profiles Controls B Profiles B Page Level Test Value 1 Page Level Test Value 2 INo layout specified]	🗉 🔤 Media Library	-
 Dictionary Dictionary Inguages Warkeing Center Soda Combination Compagement Plans Controls Profiles Test tab Profiles Test tab Page Level Test Value 1 Page Level Test Value 2 		
Controls	🗉 🧔 Aliases	Renderings [shared]:
	😓 Dictionary	[No layout specified]
B Warketing Center W Sods Posterial Post	🗄 🙆 Languages	Controls
Composigns Composigns Controls Profiles Sortest tab Page Level Test Value Page Level Test Value 1		Default [No renderings specified.]
		[No layout specified]
Print [bio renderings specified.] Print	🗉 🗦 Campaigns	
Profiles	🥜 Engagement Plans	
Profiles Profiles StatLab Page Level Test Value P	Personalization	[No layout specified]
Image: Several Test Value Image: Several Test Value		
Apage Level Test Value 2 Apage Level Test Value 2		Feed [No renderings specified.]
AP Page Level Test Value		[No layout specified]
MAL Cutput [Nor renderings specified.] MAL Cutput [Nor renderings specified.]		
المالي (Page Level Test Value 1) مالي Page Level Test Value 2		
H Maalutice Eiltere	🗄 🎔 Analytice Filtere	

5. Select the content item you want to test (the *Architectural-Digest* item) and link this item to the **Page Level Test Definition** item. In the ribbon, click the **View** tab and select **Standard fields** so that you can see the **Layout** panel in the **Content** tab.



6. Scroll down so that you can see the **Page Level Test Set** field. Click **Insert Link** to add the path to your **Page Level Test Definition** item.

Statistics	Content
E 🎲 Toolbox	
🗉 🍚 Sidebars	
Landing-Pages	
AD-Signup-Complete	Controller [shared]:
🖄 Architectural-Digest	
Architectural-Digest 1	
🖄 Architectural-Digest 2	Controller Action [shared]:
Register-Form	
🗉 🍤 Teasers	
🗉 🏭 About-Us	Presets [shared]:
🗉 🧐 Services 🔹 🔪	AL
Case-Studies	🗉 💋 Presets
🗉 動 News	Sample Layout
Contact-Us	
RSS-Feeds	
🗉 🥼 Settings	
🗉 🛅 Layout	N
🗉 🔤 Media Library	
🖃 🔢 System	N
🗉 🧔 Aliases	
📚 Dictionary	
🗉 🚺 Languages	
😑 🕥 Marketing Center	
🗉 P Goals	Insert link · Clear
🗉 🗦 Campaigns	Page Level Test Set [shared]:
🥜 Engagement Plans	/sitecore/system/Marketing Center/Test Lab/Page Level Test Definition
🗉 🔛 Personalization	
🗉 🔕 Profiles	☑ Lifetime
Test Lab	Publishing
😑 <table-of-contents> Page Level Test Definition</table-of-contents>	• •
Page Level Test Variable	G Security
🕜 Page Level Test Value	Statistics
Page Level Test Value 1	😭 Tasks
🕼 Page Level Test Value 2	👌 Validation Rules
Analytics Filters	Newlefform

7. Save all your changes.

To start the Page Level Test:

- 1. To move the test values that you created through the workflow and to start the test, select the *Page Level Test Definition* item, and in the ribbon, select the **Review** tab and click **Deploy**.
- 2. Enter a comment, such as *Run test* and click **OK**. Your page level test is now running.

0	Home Navigate <mark>Review</mark> Ana	yze Publish Versions Configure Presentation Security View MyToobar		
Save Write	ABC IN Arkup Validation Subscribe	✓ Cick Edit to lock and edit this item. ✓ My Items Locks ✓ Workflow ✓ Schedule		
6		Page Level Test Definition		
6	Gampaigns Generation Generation	▲ If you publish now, the selected version will not be visible on the Web site because it is not in the final workflow step. No other version will be published.		
B Bersonalization B Portions B Portions C Test tab				
	Page Level Test Definition Segre Level Test Variable	Name [shared]: Page Level Test Definition		

- 3. Publish all your changes to your website. In the Publish Wizard, select Smart Publish.
- 4. To test your page level test, open a new browser window and enter the name of your website.

Use the alias you created to navigate to the *Architectural Digest* page of the Office Core website. If the test is working you should see a different version of the page every time you click refresh

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(because you selected the Random test strategy).



Note

You cannot edit any of the components in the test once you have started the test.

5.4.1 Editing a Page Level Test in the Page Editor

A page level test that you have created in the Content Editor, you can edit in the Page Editor. To enable this, you need to change the application options in the Content Editor.

To enable page level testing in the Page Editor:

1. In the Content Editor, click the Sitecore button and then click Application Options.



2. In the **Application Options** dialog, click the **View** tab, and in the **Control Properties** section, select the **Show the Test Lab Section** check box.

Content Editor View	
Content Tree - Item Names	
Display Name (language-specific name)	
🔘 Item Key	
Content Tree Root	
Show the Content Tree in the Content Editor	
Show Entire Content Tree	
Control Properties	
Show the Personalization Section	
Show the Test Lab Section	
	OK Cancel

3. Click **OK**.

To edit a page level test in the Page Editor:

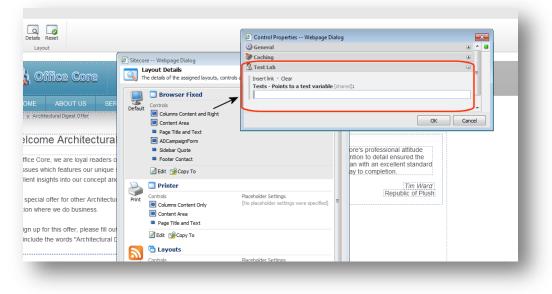
- 1. Open the Page Editor and navigate to the page that you are testing. In this example, it is the *Architectural Digest* page.
- 2. Click the **Testing** tab to see the test that you are running and to preview each of your test values.

Page Level Test Value Preview Pr	
Mode Page-level A/B/N testing	
ing interspire and	Home & Architectural Digest Offer
	Welcome Architectural Digest Readers - Alternate Page 1
	At Office Core, we are loyal readers of Architectural Digest. We are especially proud of the upcoming At Dissues which features our unique services, clients, projects and people. Architectural Digest offered excellent insights into our concept and values.
	As a special offer for other Architectural Digest readers, we're offering a 50% off of a Site Audit for any location where we do business.
	To sign up for this offer, please fill out the form below. Or, contact Maya Fanstill at ml@officecore.com and include the words "Architectural Digest Special Offer" in the subject of your email.

- 3. To change the test values in your page level test, click the **Advanced** tab and in the **Layout** section, click **Details**.
- 4. In the Layout Details dialog, select a placeholder such as Columns Content and Right.



5. In the **Control Properties** dialog, scroll down to the **Test Lab** section.



6. In the **Tests** field you can enter a link to another page level test definition item or change the test values in your current page level test.



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.

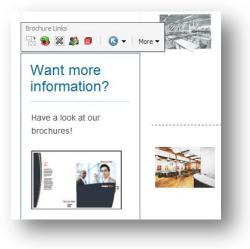
You can create personalization rules that are based on many different criteria including goals, campaigns, engagement value points, profile value points, and engagement plans.

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**, 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 stopping to open the **Personalize the Component** dialog.

Manage the personalization conditions, content, an		
is prioritized. The first true condition determines wh	nich personalization content is dis	played.
Enable personalization of component design.		New Condition
Default		
	Hide Component	
If none of the other conditions are true, the default		
condition is used.	Personalize Content:	
	[Not set]	•••

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

Enable personalization of component design.	New Condition	n
Only Show Brochure to Leads	Actions 🔻	~
ondition Edit	Hide Component Personalize Content: Not set]	
Default		~
f none of the other conditions are true, the default ondition is used.	Hide Component Personalize Content: [Not set]	

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 appears.

when a random number between 1 and upper limit compares to number when the date has passed when the current day of the month compares to number when the current day is day of the week when the current month is month. edds where the specific field is empty if if i			×
ect the conditions for the rule: Inditional Renderings when a random number between 1 and upper limt compares to number when the date has passed when the current day is day of the week when the current day is day of the week when the specific field compares to specific value where the specific field is empty the description (dick an underlined value to edit it): hy Show Brochure to Leads This rule has no conditions.	Rule Set Editor		
<pre>onditional Renderings when a random number between 1 and upper limit compares to number te when the date has passed when the current day is day of the weeks when the current day is day of the weeks when the specific field compares to specific value where the specific field compares to specific value where the specific field is empty the date of the specific value to the tit): the description (dick an underlined value to edit it): this rule has no conditions.</pre>	😫 Select the conditions and actions first. Then specify the values in th	ie description.	
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<pre>onetwork Renderings when a random number between 1 and upper limit compares to number when the date has passed when the current day of the week when the current month is month deds where the specific field compares to pumber where the specific field is empty</pre>			
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when the current day of the month compares to number when the current day of the week when the current month is month edds where the specific field is empty the description (dick an underlined value to edit it): thy Show Brochure to Leads This rule has no conditions.	when a random number between 1 and upper limit compares to number	er E	
when the current day of the month <u>compares to number</u> when the current month is month edds where the <u>specific</u> field is empty where the <u>specific</u> field	Date		
when the current day is <u>day of the week</u> when the current month is <u>month</u> edds where the <u>specific</u> field compares to <u>specific vake</u> where the <u>specific</u> field is empty is <u>in in i</u>			
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e description (dick an underlined value to edit it): hy Show Brochure to Leads This rule has no conditions.	where the specific field is empty	-	
nly Show Brochure to Leads This rule has no conditions.	< III	- F	
	Only Show Brochure to Leads		
CK Cancel	This rule has no conditions.		
OK Cancel			
OK Cancel			
OK Cancel			
CK Cancel			
OK Cancel			
			OK Cancel
			Cancer

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 the specific profile key compares to specific value"

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

	х
Rule Set Editor	
😫 Select the conditions and actions first. Then specify the values in the description.	
lect the conditions for the rule:	
ofile	
one	
ecurity	
where the user profile includes a valid email address	
where the <u>specific</u> field in the user profile <u>compares to value</u>	
where the <u>specific</u> field in the user profile is not empty	
where the value in the <u>specific</u> numeric field in the user profile <u>compares to num</u>	
sit where the current visit matches the <u>specific</u> pattern card in the <u>specific</u> profile	
where the value of the specific profile key compares to specific value	
isitor where the value in the <u>specific</u> numeric field in the user profile <u>compares to num</u>	
4 III	
le description (dick an underlined value to edit it):	
Only Show Brochure to Leads	
where the value of the specific profile key compares to specific value	
	OK Cancel



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.

					×
Select Profile Key Select the profile key to use in	this rule.				
rowse Search					
Son Function					
표 🔕 Persona					
😑 🔕 Score					
i Lead					
🎲 Profile Cards					
💋 Pattern Cards					
			OK	Cancel	
		_	L		_

- 11. In the Select Profile Key dialog, expand Score and select Lead.
- 12. In the **Rule Set Editor** dialog, in the **Rule description** field, click "*compares to*" to select a comparison to use in this rule.

				×
Select Con	parison			
Select the nur	nerical comparison to	use in this rule.		
Browse Search				
📄 is equal to				
📄 is greater	chan			
is greater	than or equal to			
is less than	1			
📄 is less thar	or equal to			
is not equa	al to			
_				
			ОК	Cancel

- 13. In the Select Comparison dialog, select "is greater than or equal to" and click OK.
- 14. In the **Rule Set Editor** dialog, 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.

	х
Rule Set Editor Select the conditions and actions first. Then specify the values in the description.	
 Select the contributions and actions mist, men specify the values in the description. 	
Select the conditions for the rule:	
profile	
Security	
where the user profile includes a valid email address	
where the <u>specific</u> field in the user profile <u>compares to value</u> where the <u>specific</u> field in the user profile is not empty	
where the specific neurin the user profile is not empty where the value in the specific numeric field in the user profile compares to num	
Visit where the current visit matches the <u>specific</u> pattern card in the <u>specific</u> profile	
where the value of the specific profile key compares to specific value	
Visitor	
where the value in the specific numeric field in the user profile compares to num	
< •	
Rule description (click an underlined value to edit it):	
Only Show Brochure to Leads	
where the value of the <u>Lead</u> profile key is greater than or equal to 50	
	OK Cancel

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 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 ^{SD} to open the **Personalize the Component** dialog.

Personalize the Component Manage the personalization conditions, content, a conditions is prioritized. The first true condition de displayed.	
Enable personalization of component design.	New Condition
Only Show Brochure to Leads.	Actions 🔻 🙈
Condition Edit where the value of Lead profile key is greater than or equal to 50	Hide Component Personalize Content: [Not set]
Default	\$
If none of the other conditions are true, the default condition is used.	Hide Component Personalize Content:Brochures
	OK Cancel



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

2	Personalize the Component Manage the personalization conditions, content, ar	nd design of the component. T	The list of	
	conditions is prioritized. The first true condition det displayed.			
Ena	able personalization of component design.		New Condition	
On	ly Show Brochure to Leads.		Actions 👻	~
	ndition Edit	Hide Component		
	ere the value of Lead profile key is greater than equal to 50	Personalize Content:		
		[Not set]		
Def	fault			~
		📝 Hide Component		
If none of the other conditions are true, the default condition is used.		Personalize Content:		
		🔍 /Brochures	×	
		ОК	Cancel	'

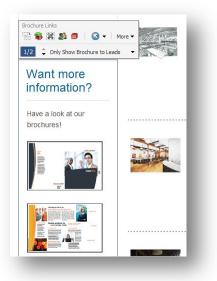
Now when a visitor comes to the *Our Services* page, they only see the download the Office Core brochure link if they have a lead score of 50 or more.

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.

2/2 🗘 Default		-
	Der	
Click Here to	o Contact Us	
		and a state of the

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.

	e first true condition d	and design of the component.		
		etermines which personalization	content is	
rsonalization of comp	oonent design.		New Cond	ition
w Brochure to I	eads.		Actions 🔻	~
	Edit	Hide Component		
	key is greater than	Personalize Content:		
		[Not set]		
				~
		Hide Component		
ne of the other conditions are true, the default lition is used.	Personalize Content:			
		/Brochures	× .	
		ОК	Canc	
	w Brochure to I value of Lead profile 50	value of Lead profile key is greater than 50	w Brochure to Leads. Edit Image: Solution of Lead profile key is greater than Personalize Content: [Not set] the other conditions are true, the default Personalize Content: Solution: Image: Solution of Lead profile key is greater than Personalize Content: [Not set] Image: Solution of Lead profile key is greater than Personalize Content: [Not set] Image: Solution of Lead profile key is greater than Personalize Content: [Not set] Image: Solution of Lead profile key is greater than Personalize Content: [Not set] [Not set] Image: Solution of Lead profile key is greater than [Not set] [Not set] <	w Brochure to Leads. Actions ▼ Edit Hide Component value of Lead profile key is greater than Personalize Content: [Not set] . the other conditions are true, the default It Hide Component Personalize Content: . Brochures X

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 righthand 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.





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

🗿 Sitecore Webpage	: Dialog 🗾
Select the As	sociated Content
Select the conter	nt that you want to associate with the rendering and use as the data source.
	Select an existing content item.
	isitecore
Select Existing Content	🖃 💑 Content
	😑 🙆 Home
42	🖃 🧔 Standard-Items
Search for Content	R Copyright
Search for Content	Srochures
_	Search-Results
	🛸 Site-Map
Clone Current	Statistics
Content	I Toolbox
	E Gebars
<u>е</u>	🗉 🔀 Landing-Pages
Create New Content	Register-Form
Create New Content	E Strasers
	Q About-Us Gervices
	Gervices Gase-Studies
	Verse Studies
	Contact-Us
	SS-Feeds
	E Settings
	II Cayout
	🗄 🛅 Media Library
	🗉 🔢 System
	Templates
	OK Cancel

3. In the **Select the Associated Content** dialog, 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.

You can also use the **Search for Content** option to search for a content item and then apply the appropriate search operation to the 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 displayed when the rule specified in this condition is met.

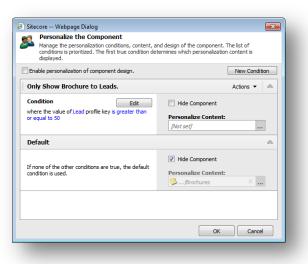
Personalizing the Layout for a Component

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.



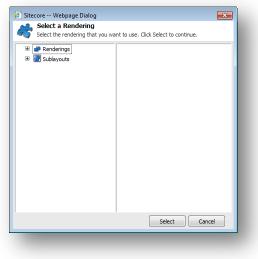
2. In the **Personalize the Component** dialog, select the **Enable personalization of component design** check box and the dialog displays some more options.

Personalize the Component Manage the personalization conditions, content, a prioritized. The first true condition determines while	nd design of the component. The list of conditions is ch personalization content is displayed.
Enable personalization of component design.	New Condition
Only Show Brochure to Leads.	Actions 🔻 🙈 🕹
Condition Edit where the value of Lead profile key is greater than or equal to 50	Hide Component Personalize Component:
Default	
f none of the other conditions are true, the default	Hide Component
	OK Cancel

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



4. In the **Select a Rendering** dialog, 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

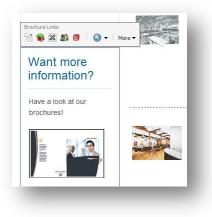
When you create a personalization rule or conditional rendering, you can base the rule on one or more of the pattern cards that you have created. This means that you can create personalization rules that target visitors whose interests and behavior match the market segments that you have identified and 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**, 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 stopping to open the **Personalize the Component** dialog.

is prioritized. The first true condition determines whi	ich personalization content is di	splayed.
Enable personalization of component design.		New Condition
Default		~
If none of the other conditions are true, the default condition is used.	Hide Component Personalize Content: [Not set]	

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

none of the other conditions are true, the default	dition Edit Hide Component Personalize Content: Mot set j ault File Component Hide Component Hide Component		New Condition
Eait File Component Personalize Content: ///or set/ ///or set/ ///or set/	Leat Price Component Personalize Content: Not set	Only Show Brochure to Decision Makers	Actions 🔻 🙈
efault Personalize Content: Not set/ Hide Component Personalize Content: Personalize Content: Personaliz	ault Personalize Content: Provide and the other conditions are true, the default tion is used. Personalize Content: Personalize Content:	Condition Edit	Hide Component
efault File Component Personalize Content: Personalize Content: Personalize Conte	ault The other conditions are true, the default The default Personalize Content: Personalize Content:	his rule has no conditions.	
none of the other conditions are true, the default Indition is used.	The other conditions are true, the default I Hide Component I Hide Compone		[Not set]
none of the other conditions are true, the default ndition is used. Personalize Content:	ne of the other conditions are true, the default tition is used. Personalize Content:	Default	~
ndition is used. Personalize Content:	ition is used. Personalize Content:		Hide Component
[Not cot]	[Not set]	f none of the other conditions are true, the default ondition is used.	Personalize Content:
pvot sety			[Not set]

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 appears.

	×
Rule Set Editor	
Select the conditions and actions first. Then specify the values in the description	1.
elect the conditions for the rule:	
Conditional Renderings when a random number between 1 and upper limit comp	
Date	
when <u>the date</u> has passed	
when the current day of the month <u>compares to number</u>	
when the current day is <u>day of the week</u>	
when the current month is month	
Fields	
where the <u>specific</u> field <u>compares to specific value</u> where the specific field is empty	
4 m	
ule description (dick an underlined value to edit it): Only Show Brochure to Decision Makers	
This rule has no conditions.	
	OK Cancel

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

	×
Rule Set Editor	
Select the conditions and actions first. Then specify the values in the description.	
elect the conditions for the rule:	
attern	
/isit	
where the current visit matches the <u>specific</u> pattern card in	
•	
ule description (dick an underlined value to edit it):	
Only Show Brochure to Decision Makers	
where the current visit matches the specific pattern card in the specific profile	
	OK Cancel
	OK Cancel



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.

	×
Select Profile	
Select the profile to use in this rule.	
Browse Search	
lo Focus	1
© Function	
A Persona	
*	
🔕 Score	
ОК	Cancel

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

			X
Select Pattern Select the pattern to	use in this rule.		
Browse Search			
	ОК	Cancel	

In the **Select Pattern** dialog, 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*.

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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.

You can either search for content items or use the content tree

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.

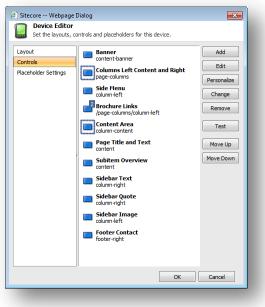
	Browser Fixed		-
Default	Controls	Placeholder Settings	
	Banner	[No placeholder settings were specified]	
	Columns Left Content and Right		
	Side Menu		
	Brochure Links		
	Content Area		
	Page Title and Text		
	Subitem Overview		
	Sidebar Text		
	Sidebar Quote		
	Sidebar Image		E
	Footer Contact		
	📝 Edit 🛯 🙀 Copy To		
2	Printer		
Print	Controls	Placeholder Settings	
	Columns Content Only	[No placeholder settings were specified]	
	🛄 Content Area		
	Page Title and Text		
	Subitem Overview		
	🛃 Edit 🛛 🔂 Copy To		
	🔁 Layouts		
Feed	Controls [No renderings specified,]	Placeholder Settings [No placeholder settings were specified]	
	🛃 Edit 🛛 🎲 Copy To		

In the **Layout Details** dialog, 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 on this control for this device.



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



- 5. In the **Device Editor** dialog, 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 appears.

displayed.	ermines which personalization content is
Enable personalization of component design.	New Condition
Only Show Brochure to Leads.	Actions 🔻 🙈
Condition Edit	Hide Component
or equal to 50	Personalize Content: [Not set]
Default	8
(f none of the other conditions are true, the default	III Hide Component
condition is used.	Personalize Content:



7. Click Personalize Content to open the Select the Associated Content dialog.

Sitecore Webpag	e Dialog 🛛 💽
	nt that you want to associate with the rendering and use as the data source.
Select Existing Content	Select an existing content item.
Search for Content	 G Home G Standard-Items G Copyright Brochures Search-Results Statistics Statistics Statistics Sidebars Sidebars Register-Form Register-Form Search Search Search Search Contact-Us Sing S-Feeds Sing S-Feeds
	00 ன System 10 💽 Templates
	OK Cancel



8. In the Select the Associated Content dialog, click Search for Content and enter *Brochures* in the Search field.

ect Existing Content	Search for content items Item: Hext:Brochures;
n for Content	▪ Brochures × Q ≡ ∷ ⊮
New Content	Your search has returned 8 results in 00.0759 seconds under the current item item Language danish (1) english (5) german_germany (1) japanese_japan (1)
	100 sitecore\admin Have a look at our brochures! Office Core Brochures Want more information? Brochures It is true! Office Core is THE featured from in the most recent lissue of Architetstum. Tremplate Wersion 1 Created: 2009-05-26 By: null Translate(ja-JP) en Brochures Request (1)
	Template: Page Event Location: Goals (4) sitecore\admin 0 Brochures Request User has requested a brochure (4)

Note

The Search for Content option is especially useful if your site contains thousands or millions of items that may be hard to find in the content tree.

9. Select the **Brochures** item and click **OK** to add it to the 'Only Show Brochure to Leads' personalization rule.

Next you need to set up a rule that specifies only visitors who score 50 or more in the Lead profile key value will see a brochure.

Adding or changing a personalization rule condition:

- 1. In the **Personalize the Component** window, add a personalization rule. Click **Edit** to open the **Rule Set Editor**.
- 2. In the **Rule Set Editor** dialog, enter the word '*profile*' to see all rules related to profiles and profile values.



3. In the rules that appear under **Profiles and Patterns**, select the rule *where the value of the specific profile key compares to specific value.*

	×
Rule Set Editor	
Select the conditions and actions first. Then specify the values in the description.	
ect the conditions for the rule:	
ofile	
curity	
where the user profile includes a valid email address	
where the <u>specific</u> field in the user profile <u>compares to value</u>	
where the <u>specific</u> field in the user profile is not empty	
where the value in the <u>specific</u> numeric field in the user profile <u>compares to</u> <u>num</u>	
sit	
where the current visit matches the specific pattern card in the specific profile	
where the value of the <u>specific</u> profile key <u>compares to</u> <u>specific value</u>	
sitor	
where the value in the <u>specific</u> numeric field in the user profile <u>compares to num</u>	
III III	
le description (dick an underlined value to edit it):	
nly Show Brochure to Leads	
where the value of the Lead profile key is greater than or equal to 50	
	OK Cancel

- 4. In *Rule description*, edit the rule. First click the word *specific* to select a profile key.
- 5. In the **Select a Profile Key** window, click the **Search** tab. You can now search for the profile key that you want to use in this rule.





6. Enter the word '*Lead*' in the search box.

Search	le key to use in this rule.		
	<pre>@Profiles 12bd7e35437b449cb93123cfa12c03d8 × Lead</pre>	c	
	Your search has returned ${f 4}$ results in ${f 00.0396}$ seconds under the current item item		Language danish (1) english (1)
٥	Lead Template: Profile Key Location: Score Lead sitecore\admin Lead Version : Created: 2013-02-11 By: sitecore\admin en ja-JP de-DE da	(4)	german_germany (1) japanese_japan (1) Template
٥	Lead Template: Profile Key Location: Score Lead sitecore\admin Version: 1 Created: 2008:12:11 By: sitecore\admin en ja-JP de-DE da	(4)	Author sitecoreadmin (4)
	Lead Template: Profile Key Location: Score Lead sitecore\admin IJ-F Version: 1 Created: 2013-02-11 By: sitecore\admin en ja-JP de-DE da	(4)	Date Range older (1) thismonth (3) thisweek (3) thisyeer (3)

- 7. Select the **Lead** profile key and click **OK**.
- 8. To select a numerical comparison, click *compares to,* select 'greater than or equal to' and click **OK**.
- 9. In specific value, enter 50.



When you have finished configuring your rule, the **Personalize the Component** dialog should look something like this:

Personalize the Component Manage the personalization conditions, conter	and design of the compon	ent The list of	
conditions is prioritized. The first true condition displayed.	n determines which personali	zation content is	5
Enable personalization of component design.		New Condit	ion
Condition Name		Actions 🔻	\otimes
Condition Edit	Hide Component		
where the value of Lead profile key is greater han or equal to 50	Personalize Content:		
	/Brochures	×	
Default			~
	✓ Hide Component		
f none of the other conditions are true, the lefault condition is used.	Personalize Content:		
lefault condition is used.	[Not set]		
	ОК	Cancel	

Now when visitors come to the site, only visitors that are classified as leads (by matching this condition) see a brochure.



Chapter 7

Viewing Reports, Dashboards and Analyses

In Sitecore you can analyze the marketing effectiveness of your website in several different ways. You can use the Executive Insight Dashboard to get an overview of marketing channels and campaigns. View Engagement Analytics reports to see the visitor session information, identify sales leads and monitor site health. Business intelligence consultants and marketing analysts can also use Engagement Intelligence analyses to drill down into DMS data to get an even more detailed insight.

This chapter mainly focuses on the standard reports available in Engagement Analytics.

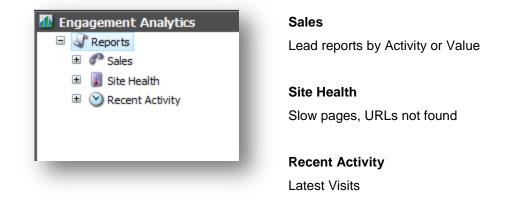
This chapter includes:

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

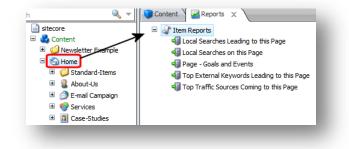


7.1 Viewing Engagement Analytics Reports

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



Engagement Analytics item reports are also available when you select a content item in the Content Editor.



For more information, see the section Item Reports.

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.

√ Reports ∃	September 01	- November 01, 2010 V Filter Des	ign				
 Image: Second State Sta	Print	Gave I 4 4 Page 1 of 4 ▶ ▶	Q 100%	Vhole Report	MailReport		
Top Leads by Value Cassified Organizations Cassified Organizations - Daily Cassified Organizations - Daily Lindassified Organizations - Daily Jindassified Organizations - Daily Jis Its Health		Top Leads by Activ Classified Organiza			-		010 - nov. 01, 2010 ted: maj. 19, 2011
Common Mistakes Caletest Failures Not Found Urls Pages that Report Errors Sow Pages		Business Unit Comcast Cable(US) <u>Business</u> / <u>Subscribe</u> / <u>CRM</u>	Activity Level 2367190	Value 5550	Visitors 2906	Visits 4969	Recency 1 Years Ago okt.26,2010
Compare Control Contro Control Control Control Control Control Control Control Control Co		Comcast Business Communications(US) ISP / <u>Subscribe</u> / <u>CRM</u>	948060	2650	1534	3770	1 Years Ago okt.26,2010
		Microsoft Corp(US) Existing Customer / <u>Subscribe</u> / <u>CRM</u>	832860	100	2247	2261	1 Years Ago okt.26,2010
		Tele Danmark(DK) ISP / Subscribe / CRM	664050	525	1823	2222	1 Years Ago okt.26,2010
		Verizon Internet Services(US) ISP / Subscribe / CRM	277070	2700	1035	1633	1 Years Ago okt.26,2010
		SBC Internet Services(US) ISP / <u>Subscribe</u> / <u>CRM</u>	192880	1600	974	1208	1 Years Ago okt.26,2010

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.



Sales Reports	Description
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.

Default sales report parameters:

Sales Report Parameters	Description
Activity Level	Used by sales teams as a way of comparing website activity levels between different visiting Business Units. Sales teams can use this information to identify potential leads.
	The formula used to calculate activity level is: INTEGER(10*Visits * Unique Visitors/Days)
	This formula generates a whole number that makes it easier to compare activity levels regardless of how many unique visitors there were or how many visits came to your site.
Value	The accumulated sum of engagement value points generated during one or more visits.
Visitors	The number of unique visitors to the site.
Visits	The total number of visits to the site.
Recency	The date of the most recent visit.

To see a more detailed description of the business purpose of a report click *Report Description*. This information is available on all standard reports.

Top Leads by A Classified Orga	
Report description	
Business Unit	Activity Level
AMAZON.COM(US)	465840



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:

Reports 🖉 Sales	July 01, 2010 - May	/ 09, 2011 👻 Design		
Site Health Common Mistakes	ig Print 🛃 Sa	we I4 4 Page 1 of 1 ▶ ▶I Q 100% A Whole	Report MaiReport	
 Latest Failures Not Found Urls Pages that Report Errors Slow Pages Recent Activity 		Slow Pages	Date Range: jul. 01, 20 Report Genera	110 - maj. 09, 2011 ted: maj. 09, 2011
	1	Report description		
		Page URL	Count	Worst Time
	1.	1. <i>L</i>	643	8 ms
		 <u>News/RSS/Feeds/News.aspx</u> 	257	380 ms
		 /en/Demonstration/Demonstration-Request.aspx 	49	954 ms
		 /en/Products/Sitecore-CMS.aspx 	46	949 ms
	1	 <u>News/RSS/Feeds/Denmark-News.aspx</u> 	46	426 ms
		 <u>/Products/Sitecore-CMS.aspx</u> 	44	398 ms
		7. <u>/en.aspx</u>	41	98 ms
	1	8. <u>/sitecore</u>	40	759 ms
	1.	9. /Products/Resources.aspx	38	542 ms
		10 /Community.aspx	36	639 ms
		11 /Products/Sitecore-Pricing.aspx	32	230 ms
		12 Partners.aspx	29	339 ms
		13 /Products/Sitecore-Online-Marketing-Suite.aspx	29	474 ms
		14 <u>/en/Products/Resources/Tours.aspx</u>	28	938 ms
		15 <u>/NotFound.aspx?item=</u>	28	33 ms

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 <i>Direct</i> , 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:

gagement Analytics Reports	Latest Visits			Date Range: jan. 25, 2009 - okt. 01, 2010 Report Generated: maj. 19, 2011	
🛙 🌮 Sales	Report description				
 Site Health Recent Activity 	Organization	Value	Visit #	Date & Time	
Recent Activity Latest Visits	1. Completel France(FR) Classify / Subscribe / CRM	0	1	<u>2010-10-01 23:57</u>	
	2. SW Television Oy(FI) Classify / Subscribe / CRM	0	<u>34</u>	2010-10-01 23:50	
	3. SW Television Oy(FI) Classify / Subscribe / CRM	0	<u>33</u>	2010-10-01 23:48	
	4. Verizon Internet Services(US) ISP / Subscribe / CRM	0	1	2010-10-01 23:44	
	5. RELIANCE COMMUNICATIONS(I Classify / Subscribe / CRM	N) 0	1	2010-10-01 23:43	
	6. FOP Budko Dmutro Pavlovuch(UA Classify / Subscribe / CRM	A) 0	1	2010-10-01 23:41	
	7. Covad Communications(US) Classify / Subscribe / CRM	0	<u>3499</u>	<u>2010-10-01 23:37</u>	
	8. SW Television Oy(FI) Classify / Subscribe / CRM	0	<u>32</u>	<u>2010-10-01 23:19</u>	
	9. InterNLnet B.V.(NL) ISP / Subscribe / CRM	0	<u>23</u>	<u>2010-10-01 23:17</u>	
	10. Telecom Internet Services(NZ) Classify / Subscribe / CRM	50	2	2010-10-01 23:12	
	11. InterNLnet B.V.(NL) ISP / Subscribe / CRM	0	<u>22</u>	2010-10-01 23:10	
	12. Covad Communications(US) Classify / Subscribe / CRM	0	3498	2010-10-01 23:08	

Under Latest Visits you can drill-down to the following sub reports:

- Business Overview
- Visitor Overview
- Business Visits
- Visit Detail



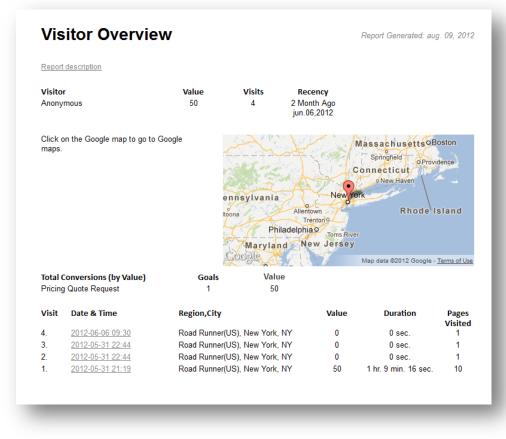
Click on the name of an organization in the Latest Visits report to view the Business Overview report:

Business Overvie	Report Generated: maj. 19, 2011				
Report description					
Business Unit	Total Value	Total Visits	Total Visitors	Recency	Activity Level
Completel France(FR)	0	11	11	1 Years Ago	0
Classify / Subscribe / CRM				okt.28,2010	
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.				Norge Norway	1
You opened this report by olicking the name of a business in one of the Top Leads reports.		ogle		Germany Österreich Austrigo	biska biand Diand Yk ndata - Servoevilta
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) Take a Business Tour		Goals 1	Value 0		
Business Unit	Value	Visits	Visitors	Recency	Activity Level
Completel France(A8)	0	<u>6</u>	5	1 Years Ago okt.28,2010	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 on the business unit you selected. 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.



In the Business Overview report, click on one of the listed visitors under Top 20 Visitors to view the Visitor Overview report.



The *Visitor Overview* report shows the engagement value accumulated during visits and the number of visits. It displays goals, provides information that can help you to calculate activity levels and gives you an indication of what the visitor is interested in on your website.



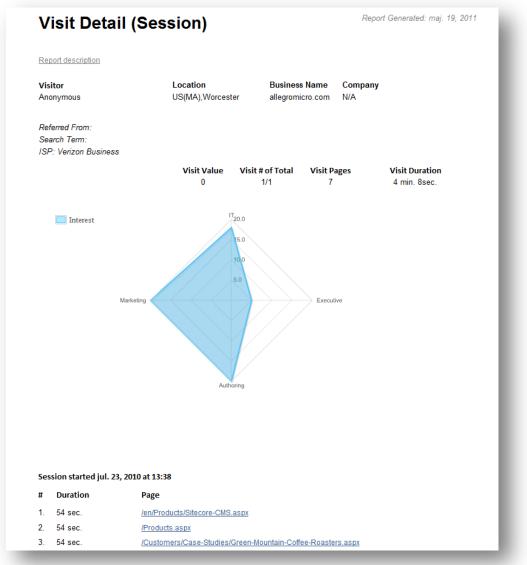
In the Business Overview report, click on the number of visits displayed under *Total Visits* to view the *Business Visits* report:

Report	description					
Busine	ess Unit	Total V	alue	Total Visits	Total Visitors	Activity Level
	etel France(FR) // <u>Subscribe</u> / <u>CRM</u>	0		11	11	0
	Visit Date & Time	Value	Visits #			
11.	2010-10-01 23:57	0	<u>1 of 1</u>			
10.	2010-09-01 02:37	0	2 of 3			
9.	2010-04-27 04:06	0	<u>1 of 1</u>			
8.	2010-02-03 21:58	0	<u>1 of 1</u>			
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			
	2000 10 10 20.11					

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 detailed description of the business purpose of this report.



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.			



Visit Details	Description
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 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.

7.1.4 Item Reports

Item reports provide engagement analytics information on the performance of individual pages on your website. For example, you can see the goals and page events triggered by visitors to a particular page.

To view an item report:

- 1. In the Sitecore Desktop, open the Content Editor.
- 2. In the Content Editor, content tree, select an item.
- 3. In the Sitecore ribbon, select the Analyze tab and then click Reports.
- 4. A new **Reports** tab appears next to the **Content** tab, right of the content tree.

als Attributes Details Reports Behavior				
Copyright	Content Reports X			
🧔 Brochures	Item Reports	November 14 - November 21, 2012	Filter Design	
🛸 Search-Results	Local Searches Leading to this Page	November 14 - November 21, 2012	Hiter Design	
≶ Site-Map	Local Searches on this Page	📑 Print 🛛 🛃 Save	Page 1 of 1 ▶ ▶	Q 100%
Statistics	Rage - Goals and Events			·
🗉 🎲 Toolbox 🦳	🖏 Top External Keywords Leading to this Page			
🗉 🤤 Sidebars	Top Traffic Sources Coming to this Page			
🖃 🔀 Landing-Pages				
🖄 AD-Signup-Complete		Page - Goals	and Events	
Architectural-Digest		i uge - Oouis		
Special Offer		Report description		
🗉 🦙 Register-Form				
Iteasers		Page URL: /SO		
🗉 🏭 About-Us		Tuge one. <u>100</u>		
🗉 🌛 E-mail Campaign		Visits	Value	Value per Visit
Services		2	5	2,00
🗉 💑 Consult 📃		Bounce Rate	Naurus Datumina	Aug Time on Deer
🗉 💑 Design			New vs. Returning	Avg. Time on Page
🗉 💑 Build		0,00%	100,00% / 0,00%	1 min. 18 sec.
🗉 💑 Furnish				
Case-Studies		The following table lists the i conversion of a goal by placi		
🗉 📦 News		mind, that often visitors will r		
E Contact-Us		convert when they are ready.		



The following table lists the default item reports that are available from the Sitecore Content Editor:

Report	Description
Local Searches Leading to this Page	This report lists the search terms that visitors use on your website and which lead them to this page. These are the words and phrases that visitors are interested in but are unable to find through using the menu, links, or other typical browsing activities.
Local Searches on this Page	This report lists the words and phrases that visitors searched for while they were on this page.
Page - Goals and Events	This report shows how this page contributes to goal conversion and value consumption.
Top External Keywords Leading to this Page	This report shows the top external keywords visitors used in this time period to come to this page. Keywords are ranked by the value accumulated by visitors who used this keyword.
Top Traffic Sources Coming to this Page	This report lists the top external traffic sources for this page during the selected time period.



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.

Latest Visits	Sitecore Webpage Dialog Visitor Classification Classify a visitor.
Report description Organization 41. TEC INTERNATIONAT(GB) Classific Subscribe / GRM	Unclassified Unclassified. Business TEC INTERNATIONAL
42. XS4ALL Internet BV(NL) ISP / Subscribe / CRM	Unclassified This visitor has not been classified.
43. Telewest Broadband(GB) ISP / Subscribe / CRM	
44. FastNet International Ltd(GB) Classify / Subscribe / CRM	
45. Fullrate DK(DK) ISP / Subscribe / CRM	
46. WMO WORLD METEOROLOGICAL ORGANISATION(CH) <u>Classify</u> / <u>Subscribe</u> / <u>CRM</u>	
47. Tele Danmark(DK) ISP / Subscribe / CRM	
48. FastNet International Ltd(GB) Classify / Subscribe / CRM	OK Cancel
49. Microsoft Corp(US) Existing Customer / Subscribe / CRM	0 <u>1</u> <u>2010-10-26 05:35</u>

5. In the **Visitor Classification** dialog, 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	



Attribute	Description of values
	 Business Partner Competitor My Company 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.

Latest Visits					
<u>Rep</u>	ort description				
	Organization				
41.					
42.	XS4ALL Internet BV(NL) ISP / Subscribe / CRM				
43.	Telewest Broadband(GB) ISP / Subscribe / CRM				

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:

🖉 Sitecore Webpage Dialog	×
Subscription Subscription confirmation.	
You have subscribed.	
	Close



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

Latest Visits				
<u>Rep</u>	ort description			
	Organization			
41.	TEC INTERNATIONAL(GB) Classify / Subscribe CRM			
42.	XS4ALL Internet BV(NL) ISP / Subscribe / CRM			
43.	Telewest Broadband(GB) ISP / Subscribe / CRM			

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.

引 Print	🛃 Save	14	4	Page	1 of 1 ♪	▶∥ Q 10
					T	op Le
					_	lassif
						ort descriptio
						siness Unit
					Cor	ncast Cable
					Bus	iness / Subs

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.

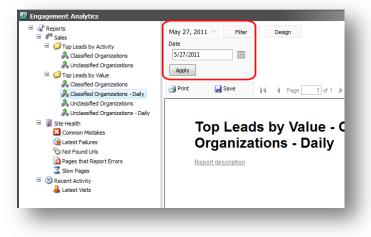
Date Range					
14-07-2009	8] - 21-07	-2009	8	
Apply					
🚽 Print	🔛 Save	14 -	Page	1 of 1 ♪	🔍 100%

- 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.

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

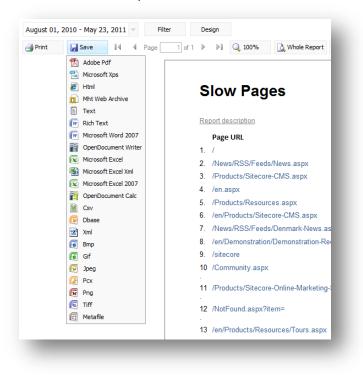


7.5.2 Saving a Report

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.

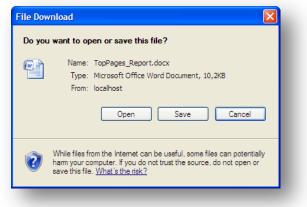
To save a report:

- 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*.



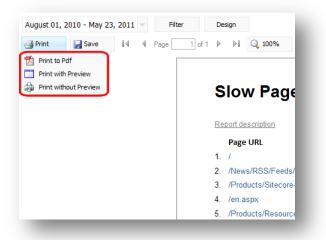
- 5. Open or save the report.
- 6. If you decide to save the report, you can store the report in a local folder.
- 7. Follow the same procedure to save the report in any of the other file formats.

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 Option	Description		
Print without Preview	Displays the Print dialog		

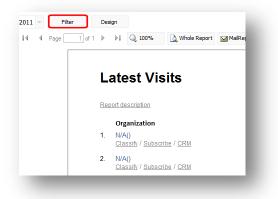
4. In the **Print** dialog, click **Print**.

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.





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

y 23, 2011 👻 Filter	Design	👩 Sitecore Webpage Dialog
II II II of 1	▶ ▶ Q 10	Filters Editor
	V VI 🔍 IG	Select your filters first, then specify the values in the description.
		Select the filters:
		Visitors 01
	Latest	2 Analyst
		Business Partner
	Report descripti	Competitor
		Existing Customer
	Organizat	Human
	1. N/A()	ISP
	Classify /	My Company
	2. N/A()	Potential
	Classify /	
	3. N/A()	Prospect
	Classify /	
	4. N/A()	Supplier
	Classify /	Unknown
	5. N/A()	Visitor is Unidentified
	Classify /	Culture
	6. N/A()	Australia DACH
	Classify /	Denmark
	7. N/A()	
	Classify /	Curope
	8. N/A()	North America
	Classify /	
	9. N/A0	OK Cancel
	9. N/A() Classify /	
	10. IP_NOT_F Classify /	FOUND(N/A) 0 <u>1</u> <u>2010-12-22 14:27</u> Subscribe / CRM

4. In this example, select the following values:

Filter	Value
Visitors	Analyst
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.

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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.

Save cur a contract of cur a c	
Save Edit Insert from Template (2 of 2) = Duplicate (E Move To Delete - Paste D) Copy Deplay Name Operations Cipboard Rename Sort	
Write Edit Insert O Operations Clipboard Rename Sort	Down
	ing 🕏
Culture	_
B SS-Feeds	- 1
(# U Settings	_
	- 1
Media Library Item Name: Culture	- 1
System Item Path: /sitecore/system/Marketing Center/Analytics Filters/Report Filters/Cul	lture
Moses	
😒 Dictionary 😰 Sitecore Webpage Dialog 💽 -06E9-468E-4	A805-6
Languages Enter the name of the new item:	- 1
Goals	- 1
Brazil	_
P Engagement Plans	_
OK Cancel	
George Angeler Contraction	alytic
Test ab	- 1
ColumnName [shared]:	_
E Preport Filters	_
G Oulture	- 1
australia	
DACH	
E Denmark E	
Europe	
Netherlands	
🔜 North America	
🔚 Sweden	
🔡 UK	
USA USA	
I 🐨 State	
🗄 🔐 Visitors	

3. Name the new filter item Brazil.



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

 □ ① Marketing Center ■ № Goals ■ Ø Campaigns 		Scontent Brazil
🥜 Engagement Plans 🗉 🔛 Personalization		Quick Info
 Profiles Test Lab Analytics Filters Report Filters Culture Australia Brazi DACH 		Item ID: {8EDFADA0-FEF5-427E-96FE-DC8D25C70833} Item Name: Brazil Item Path: /sitecore/system/Marketing Center/Analytics Filters/Re Template: /sitecore/templates/System/Analytics/Predefined Filter Created From: [unknown] Item Owner: sitecore/admin
Denmark Europe North America Sweden K UK SA State Visitors Visitors	Ш	E Data Value [shared]: BR

- 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, you can now select the *Brazil* filter.

Sitecore Webpage Dialog		-X -
Filters Editor Select your filters first, then sp description.	ecify the values in the	
elect the filters:		
Culture		*
Australia		
Denmark		
Europe		=
Netherlands		
North America		
Sweden		
UK		
USA		
State		
Alabama		
Alaska		
Arizona		
Arkansas		
California		Ψ.
	OK Car	ncel



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

	▶ Q. 100% Q. Whole Report ☑ M			
La	atest Visits			Date Range: okt. 03, 2010 - maj. 24, 2011 Report Generated: maj. 24, 2011
Rep	ort description			
	Organization	Value	Visit #	Date & Time
1.	NET Serviços de Comunicação S.A. (BR) <u>Classify</u> / <u>Subscribe</u> / <u>CRM</u>	0	1	2010-10-25 19:08
2.	Tele Norte Leste Participações S.A. (BR) <u>Classify</u> / <u>Subscribe</u> / <u>CRM</u>	0	1	<u>2010-10-25 12:08</u>
3.	NET Serviços de Comunicação S.A. (BR) <u>Classify</u> / <u>Subscribe</u> / <u>CRM</u>	0	1	2010-10-25 10:54
4.	Global Village Telecom LTDA.(BR) Classify / Subscribe / CRM	0	<u>6</u>	2010-10-25 09:33
5.	NET Serviços de Comunicação S.A. (BR) <u>Classify</u> / <u>Subscribe</u> / <u>CRM</u>	0	1	2010-10-25 04:58
6.	Global Village Telecom LTDA.(BR) <u>Classify</u> / <u>Subscribe</u> / <u>CRM</u>	0	1	2010-10-24 20:30
7.	Comercial Cabo TV São Paulo S.A. (BR) <u>Classify</u> / <u>Subscribe</u> / <u>CRM</u>	50	1	2010-10-24 18:04
8.	NET Serviços de Comunicação S.A. (BR) <u>Classify</u> / <u>Subscribe</u> / <u>CRM</u>	0	1	2010-10-24 18:04
9.	NET Serviços de Comunicação S.A. (BR) <u>Classify / Subscribe / CRM</u>	0	1	2010-10-24 18:03

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.

re Publish Versions Presentation V	Sitecore Webpage Dialog Icon Assign an icon to the item.
Content Brazil	Enter the file name of the icon: Business/32x32/funnel_edit.png For example: 'Applications/16x16/ebout.png'. You can also select an icon:
Data Header: where the visitor is from Brazil Assign Filter: where the visitor is from Brazil	
	OK Cancel



- 3. In the **Icon** dialog, 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*.



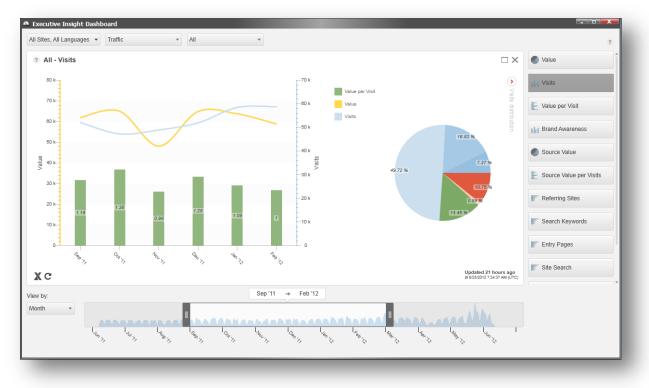
7.6 Executive Insight Dashboard

The Sitecore Executive Insight Dashboard provides marketers and SEO analysts a high level overview of the performance of their website, with a particular emphasis on individual marketing channels and campaigns.

It presents data from the DMS in charts that enable you to see at a glance which of your marketing activities are most successful and which need attention so that you can optimize your SEO strategies in the future and in turn increase ROI.

7.6.1 Viewing Charts and Dashboards

To view a dashboard, in the Sitecore Desktop, click the **Sitecore Start** button and then click *Executive Insight Dashboard*.



For more detailed information about using the Executive Insight Dashboard including some examples of business scenarios, see the *Executive Insight Cookbook* on SDN.



Chapter 8 Appendix

This appendix contains some extra information that you may find useful when using the DMS.

This chapter contains the following section:

GeoIP Lookups •



8.1 GeoIP Lookups

When you use the Sitecore Rules engine to create conditional renderings or personalization rules, you can create rules that use information provided by a GEOIP lookup service as parameters in a rule.

A GeoIP lookup provides information about the location and owner of an IP address beyond that provided by a reverse DNS lookup. To include GeoIP information in reports, the Engagement Analytics engine uses an external service that performs GeoIP lookups.

Note

Sitecore customers must enter into a contract with a third-party such as MaxMind to obtain a GeoIP lookup service. This product includes GeoLite data created by MaxMind (<u>http://www.maxmind.com/</u>). For more information about MaxMind, see <u>http://sdn.sitecore.net/Products/OMS/MaxMind.aspx</u>.

The information provided by the GEOIP lookup service includes:

- Area code stored in digits, for example 410.
- Exact city the extent of the named area must be confirmed by the GEOIP lookup service.
- Name of the ISP the detail of this information must be confirmed by the GEOIP lookup service that you use.
- Metro code associated with the IP address this is only available in the USA. MaxMind returns the same metro codes as the Google AdWords API.
- Postal code associated with the IP address these are available for some IP addresses in Australia, Canada, France, Germany, Italy, Spain, Switzerland, United Kingdom, and the USA. MaxMind returns the first 3 characters for Canadian postal codes and the first 2-4 characters for postal codes in the United Kingdom.
- A two character ISO-3166-2 or FIPS 10-4 code for the state/region associated with the IP address.

For the US and Canada, MaxMind returns an ISO-3166-2 code. In addition to the standard ISO codes, it may also return one of the following:

- AA Armed Forces America
- AE Armed Forces Europe
- AP Armed Forces Pacific

MaxMind returns a FIPS code for all other countries.

MaxMind also provide a CSV file which maps our region codes to region names.

For a more detailed list of the information provided by MaxMind, see http://dev.maxmind.com/geoip/legacy/web-services/

If you are using another GEOIP lookup service, see their website for more information.

For more information about GEOIP lookups and MaxMind, see the manual *Engagement Analytics Configuration Reference*.