Sitecore CMS 7.5

Experience Profile Quick Start Guide

Getting started with the Sitecore® Experience Profile™

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Chapter 1

Getting Started with the Experience Profile

This document is a quick start guide aimed at introducing the Experience Profile to sales or business users who will use it to monitor all contacts with their website.

This chapter includes the following sections:

- Overview
- Preparation
- Overview of the Experience Profile
- Experience Profile Scenarios
- Configuration
- FAQs

1.1 Overview

This is a quick start guide aimed at introducing the Experience Profile to sales or other business users.

The Experience Profile enables you to monitor the behavior of contacts that have interacted with your company or organization website. You can identify current as well as future customers from their very first point of contact, even if a name has not yet been provided.

This document aims to provide clear and simple instructions to get you quickly up and running with the Experience Profile. This includes some basic preparation and configuration steps. It also provides some simple example scenarios designed to demonstrate how sales staff might use the Experience Profile.

1.1.1 Prerequisites

- Sitecore 7.5 and later – Sitecore should be pre-configured to use profiles, goals, campaigns and automation plans before it is possible to experience the full functionality available in the Experience Profile.

For more information on how to pre-configure Sitecore with the Experience Profile, see the configuration section.

1.1.2 The Contact

In Sitecore, a contact is somebody that uses one or more devices to interact with a company or organization. The contact is like a container to store information about the behavior of customers and potential customers from the devices they use, to all their online interactions, such as website visits, goals converted, and campaign pages visited.

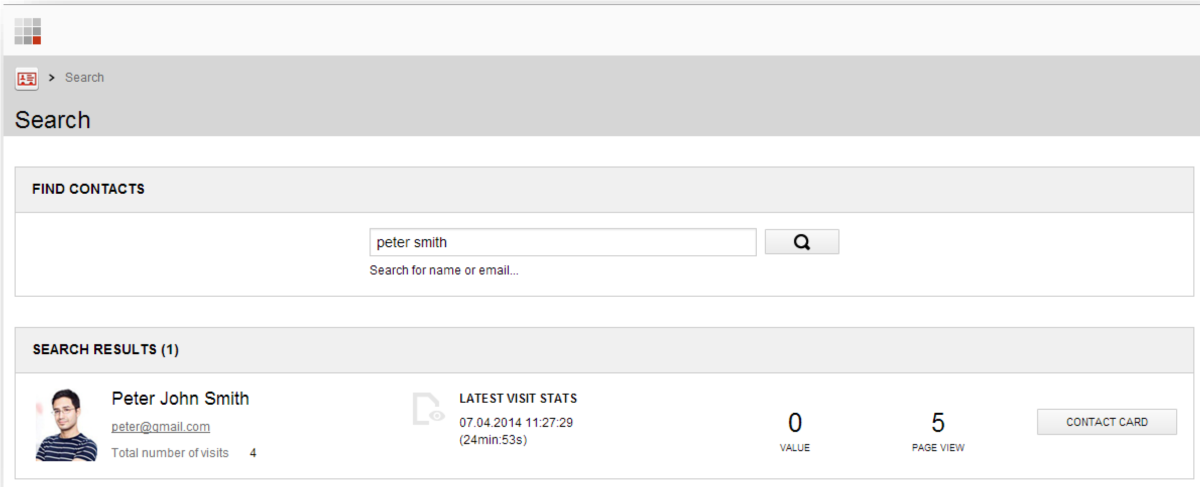
In the Sitecore® Experience Platform™ (Sitecore XP), from starting out as an anonymous visitor to a website, contacts can be used to build up a picture of potential customers. By storing data from a wide variety of sources it is possible, over time, to build up a detailed picture of how a contact interacts with your organization.

For more information on the concept of the contact, see the *xDB Overview and Architecture* on SDN.

1.1.3 The Experience Profile

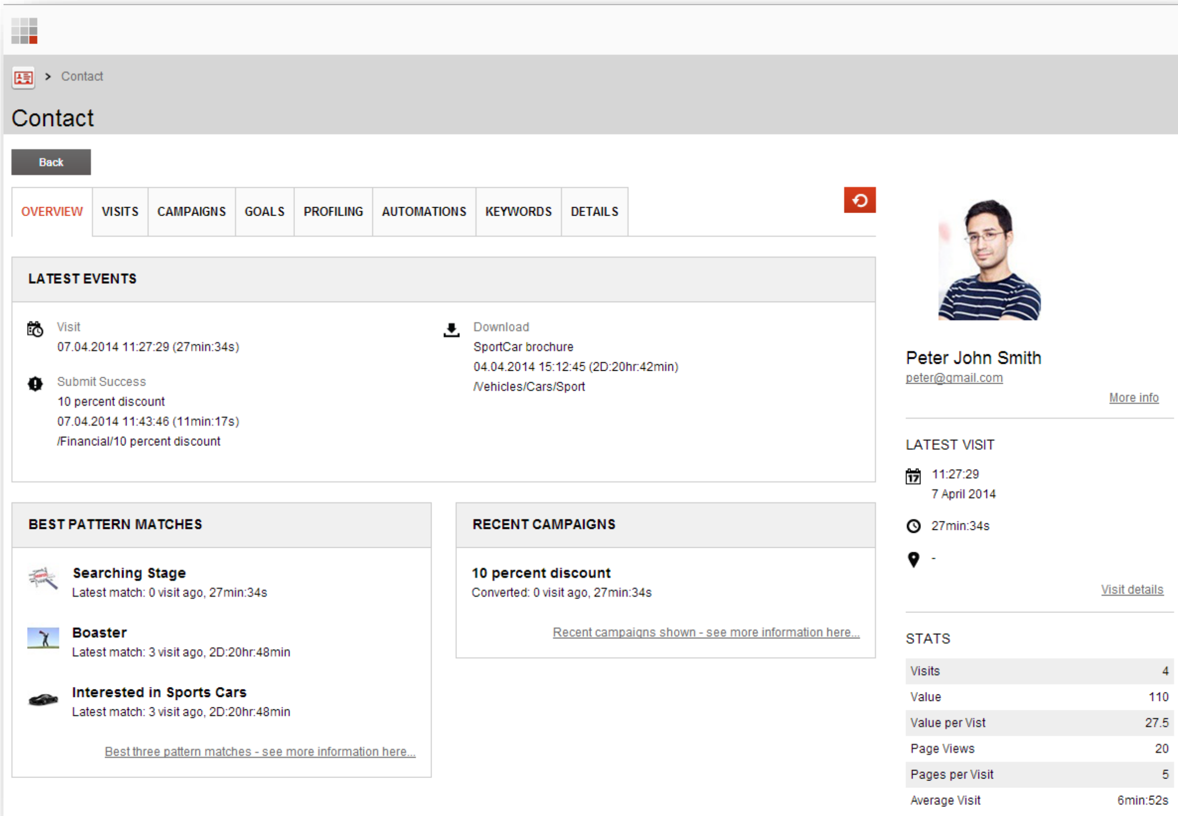
The Experience Profile is an application that enables you and your sales teams to monitor the key areas of customer experience and interaction, such as visits, campaigns, goals, profiles, automations and keywords. For example, for each contact, you can see at a glance which events and goals they have triggered and how many engagement value points they have accumulated on your website.

The Home page of the Experience Profile is like a dashboard that enables you to find specific contacts. When your website has been running for some time you may have many contacts to search through.



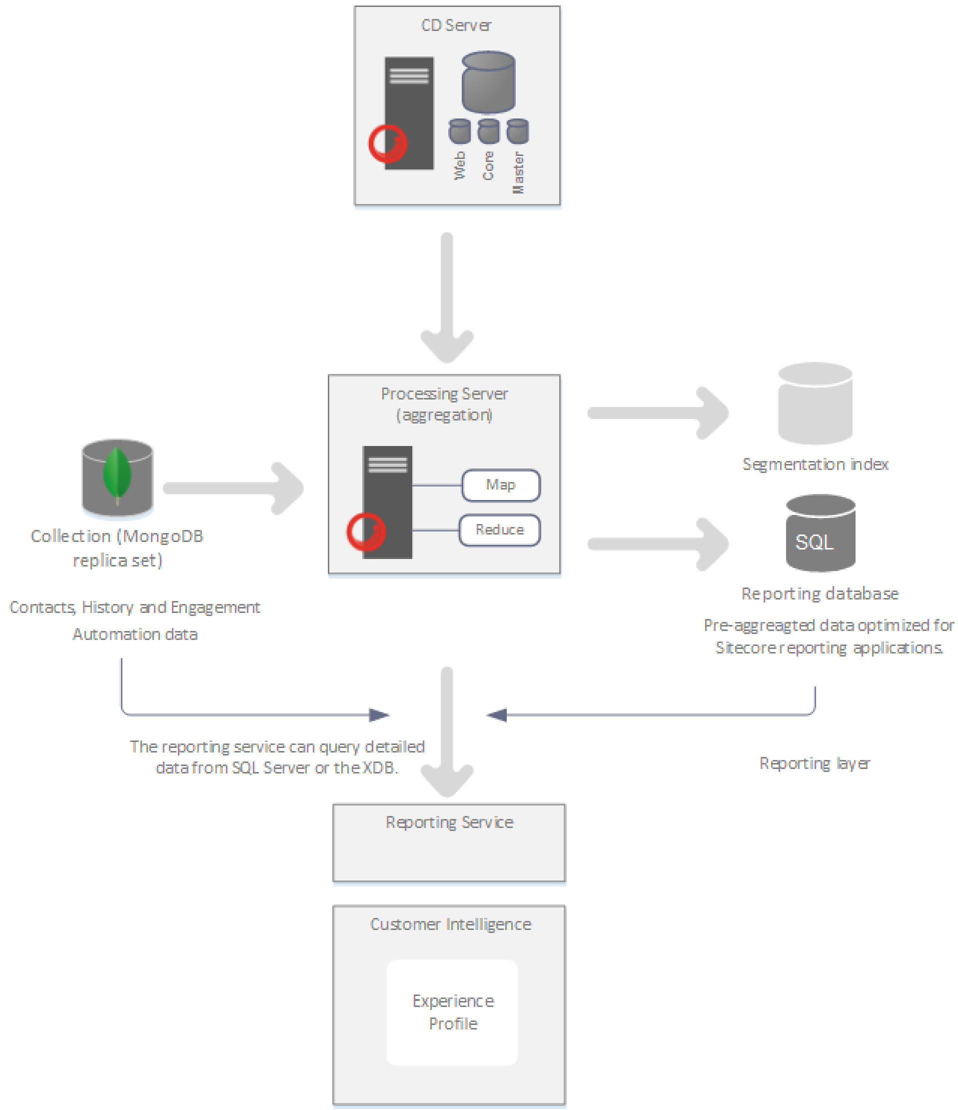
Using the Experience Profile you can focus on the accumulated experience of a single contact and view the details of all their interactions and experience with your website.

In the following example, you can see the contact details for a fictitious contact Peter Smith. You can see which events he has triggered, campaigns visited, visit and engagement value statistics and his best profile pattern matches. This is valuable information for sales executives.



1.1.4 Architecture

Diagram showing how the Experience Profile fits into the Sitecore architecture.



1.1.5 Installation and Configuration

The Experience Profile is included as one of the core Sitecore applications in the Launch Pad, so there is nothing to install. It runs straight *out of the box* but if you have not configured any profiles, goals or campaigns in Sitecore you will not see very much meaningful experience data.

For more information on using the Experience Profile, see the section Experience Profile Scenarios for some simple examples of how to use the Experience Profile.

1.2 Preparation

Before you can start using the Experience Profile you need to pre-configure some Sitecore XP experience marketing functionality. The Experience Profile works *out of the box* but if you have not implemented a profiling strategy, set goals, created campaigns and engagement plans or had any site visits then there will only be a limited amount of information available about your contacts.

Without first configuring any experience marketing functionality you will still be able to see a list of contacts (visitors) but you will only get general information about these contacts, such as external keywords and any the session information recorded in the *Visit Detail* report. Without key metrics such as goal conversions or engagement value accumulated it is difficult for sales staff to determine levels of commitment and whether a current visitor (contact) is likely to become a future customer.

To configure Sitecore XP to work with the Experience Profile you need to follow a series of steps that require forward planning and some careful thought. You can find documentation on the Sitecore Developer Network (SDN) that can help with this, such as the *Marketing Operations Cookbook* which covers each of these areas.

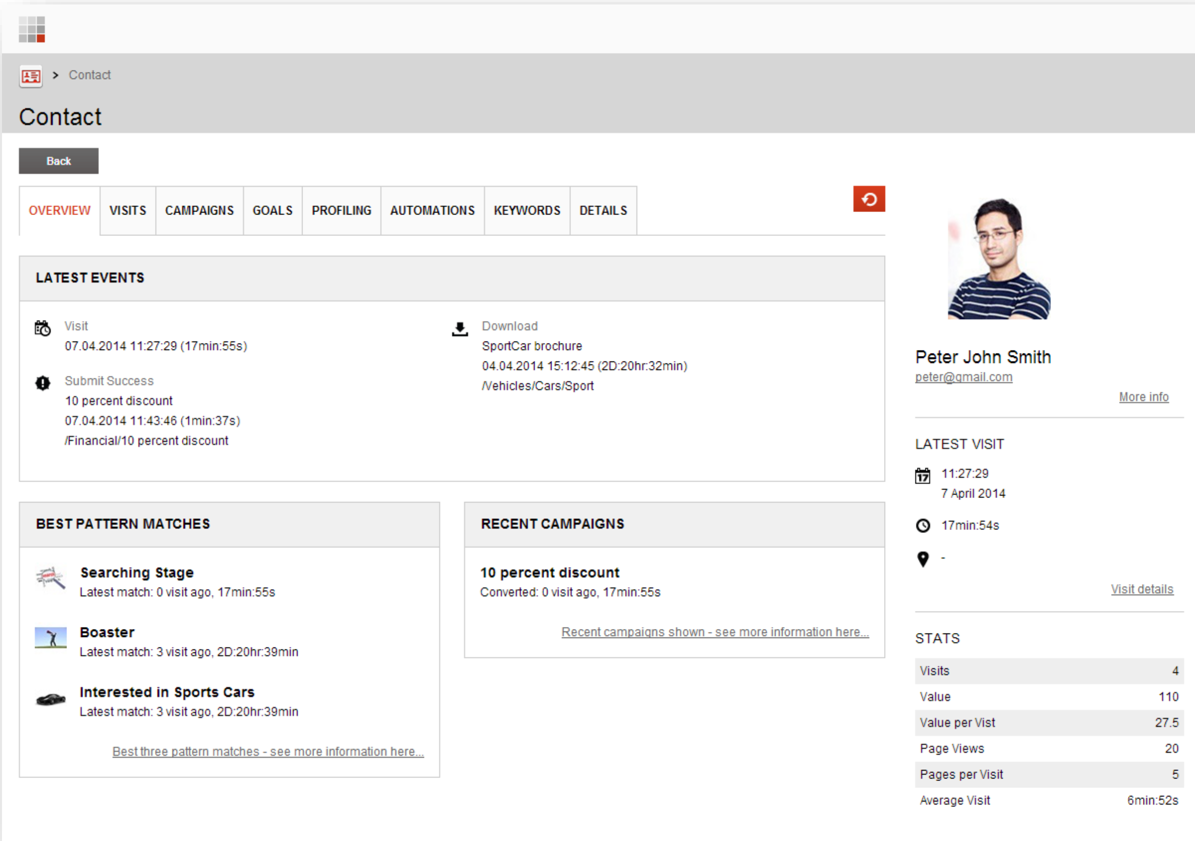
Also, SBOS (Sitecore Business Optimization Services) have extensive resources available and can help you through this process for the first time. All SBOS resources are available to download from the SPN (Sitecore Partner Network) http://spn.sitecore.net. For example, you can learn how to configure Sitecore XP to create profiles, implement predictive personalization, set goals or set up MV tests in line with the guidelines set out in the *Customer Experience Maturity Model*.

Summary of the steps required to pre-configure Sitecore for use with the Experience Profile:

1. Evaluate your website.
2. Create personas in the Sitecore Marketing Center.
3. Create and configure profile cards.
4. Allocate profile values to the content on your website.
5. Create and configure a set of pattern cards.
6. Create goals.
7. Create campaigns.
8. Configure personalization.
9. Create automation plans.
10. Collect visits on your website.

1.3 Overview of the Experience Profile

The Experience Profile consists of eight tabs each presenting a summary of key analytics information related to the contact. There is also an information area to the right which continually displays a summary of latest visit information and metrics for the contact. It also provides a link to the *Visit Detail Report* which contains more detailed information on the contact's latest visit:



The following table provides an overview of the functionality of each tab in the Experience Profile:

Tab name	Group	Description
Overview	Latest Events	This group displays the latest contact visit and up to 9 other latest events. For example, goals converted, downloads or external/paid searches. Events that appear in the *Latest Events* group are pre-configured in the Content Editor, for more information, see section 1.5 Configuration.
	Best Pattern Matches	This group displays the top 3 best pattern matches for a contact based on how closely a pattern matches the visitor's profile.

	Recent Campaigns	The 3 most recently triggered campaigns.
Visits	Visits	This group displays a list of all visits sorted by recency. Click on a visit to open the *Visit Detail Report*. The *Visit Detail Report*, provides more detailed information on the latest visit, such as, pages visited, goals converted and internal search terms used.
	Events	This group displays a list of all latest events triggered by this contact, sorted by recency. Events that appear in the *Events* group are pre-configured in the Content Editor, for more information, see section 1.5 Configuration.
Campaigns	Campaigns	List of all campaigns triggered by the contact.
Goals	Goals	List of all goals triggered by the contact.
Profiling	Profiles	The profiling tab displays the best pattern card matches for each profile based on visits made by this contact. For example, you could have the following set of profiles: • Persona • Car Type • Stage in the buying cycle For each profile, a radar chart and profile key scores are shown. Profiles and profile keys are pre-configured in the Sitecore Marketing Center.
Automation	Engagement Plans	List of engagement plans that the contact has triggered and the current state the contact occupies.
Keywords	External Keywords	List of distinct keywords used when searching with an external search engine such as *Google* or *Bing*. For selected keywords you can see more detailed information, such as list of search engines, visit duration and value.
	Internal Keywords	List of keywords used in searches from inside the website.

	Paid Keywords	List of distinct paid keywords used such as from *Google AdWords*. For selected keywords you can see more detailed information, such as a list of sources, visit duration and value.
Details	Contact Details	This group contains all the contact information for the contact. It has two modes: *full* and *compact*. Click *More* to see full mode: Name, gender, birthday, all email addresses, all phone numbers and all addresses. Click *Less* to see compact mode: Name, gender, birthday, preferred email address, phone number and address. Contacts add all email addresses and phone numbers themselves.

1.4 Experience Profile Scenarios

This section outlines two business scenarios using the Experience Profile.

1.4.1 Scenario 1: Sales Executive

In this example scenario, a sales executive wants to find out how engaged a named contact is with the car dealership website. To see the session trail for all interactions (visits), view goals and events triggered, campaigns enrolled for, engagement plans triggered and keywords used.

The Experience Profile provides an overview of the levels of engagement and commitment shown by a contact, which in turn helps sales staff to understand the characteristics, browsing behavior and buying preferences of a contact.

Story:

A sales executive working for a car dealership wants to find a named contact, Peter Smith and get a quick overview of his level of engagement with the car dealership website in order to know what course of action to take to make this contact into a customer.

In this scenario you complete the following tasks:

- Open the Customer Intelligence Dashboard and find a named contact.
- Use the Experience Profile to analyze the level of engagement of a contact.
- Draw conclusions that help in making future decisions – what kind of persona does this contact most closely match? Is this contact likely to be a future customer or sales lead?

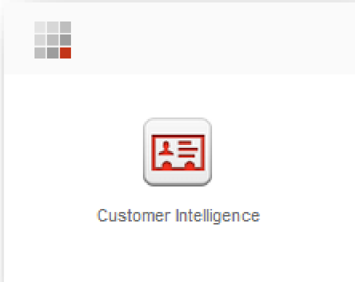
Open the Customer Intelligence Dashboard and find a named contact

A sales executive wants to open the Experience Profile, and find a contact by either entering a name or email address in the search box provided.

To open the Experience Profile and find a named contact:

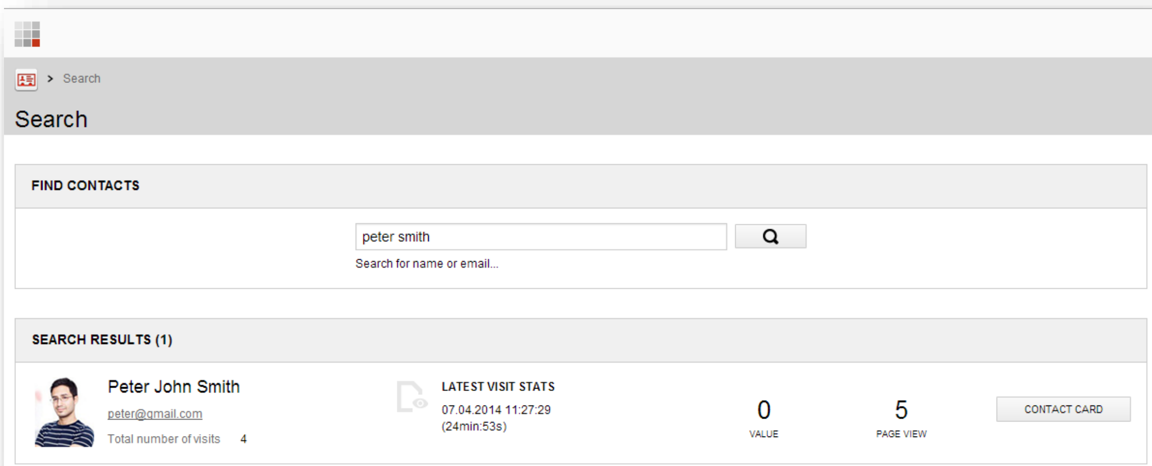
1. In a web browser, enter the URL of your Sitecore website.
2. Enter your log in credential and in **Options**, click **Launch Pad**.

3. Click *Customer Intelligence* to find contacts. By default you can see a list of the latest visitors to your website.



You can select a contact directly from the list or alternatively use the search box to find a known contact by name or email address.

4. For example, enter the name *Peter Smith,* his email address or part of the name in the Customer Intelligence Search box to find out more about the experience this contact has had with your website or click on the name if you already see it displayed in the list of contacts.
5. Look for the contact you are searching for in the search results and then click the Experience Profile button.



6. The Experience Profile for Peter Smith opens. By default, the **Contact** tab is shown first.

Analyze the level of engagement of a contact

Sales executives want customer experience reports that provide them with a quick summary of the key interaction data for each contact that has visited their website. This data could range from visits, pages viewed, enrolled campaigns, engagement value points to active engagement plans.

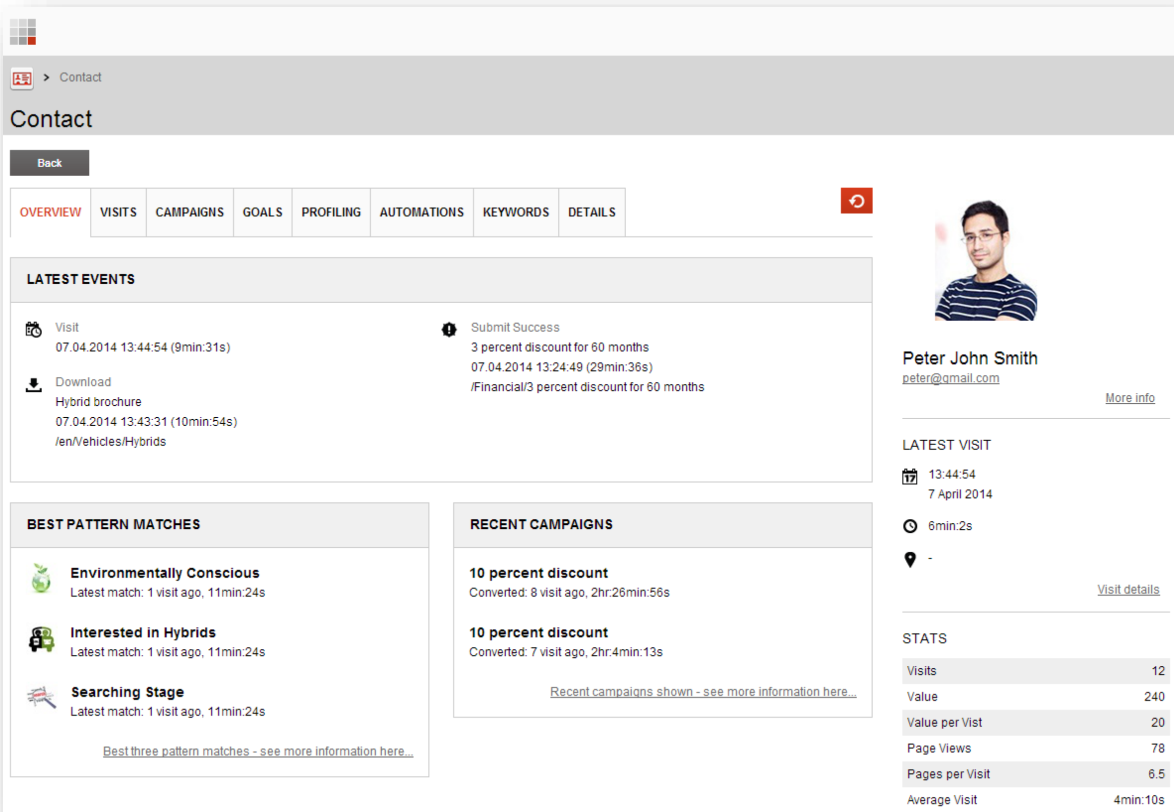
Reports can help sales people to gauge the level of interest a contact has shown in their website. They can target promising sales leads and follow up initial interest with a telephone call or meeting. It is important to know whether a contact is merely browsing pages on a website without any intention of buying or if the contact is showing more signs of commitment, for example, by completing a campaign registration form or by downloading a price list or brochure. The Experience Profile can provide sales executives with all this valuable information.

To analyze the level of engagement of a specific contact we can view 2-3 key tabs from the Experience Profile.

Overview tab

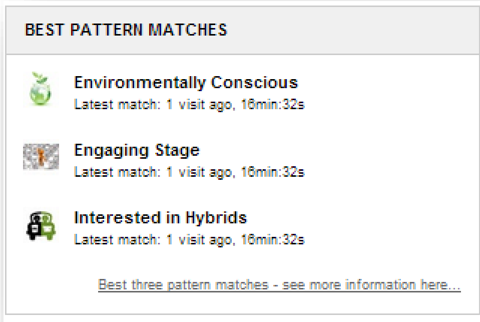
The Overview tab consists of three groups of information that enable you to get a quick overview of the experience of a contact or visitor to your website:

- Latest Events
- Best Pattern Matches
- Recent Campaigns



Latest Events displays a selection of events that Peter Smith has recently triggered on the website. You can see his last recorded visit, that he has downloaded two brochures and that he has used the search keywords *car safety* and *fuel economy*.

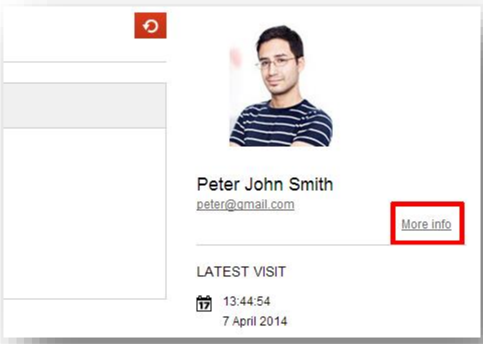
For example, *Best Pattern Matches* presents sales staff with an instant snapshot of the preferences and interests of this contact based on profile values and pattern matches collected during a visit.



Each pattern card contains a predefined set of profile values, so as a contact browses the website they can be matched to different pattern cards depending on the content they have viewed. In the example of a car dealership website this enables sales staff to know which type of car a contact is interested in and how close they are to making a purchase. The *See more* link enables you to go directly to the *Profiling* tab to get more in depth information.

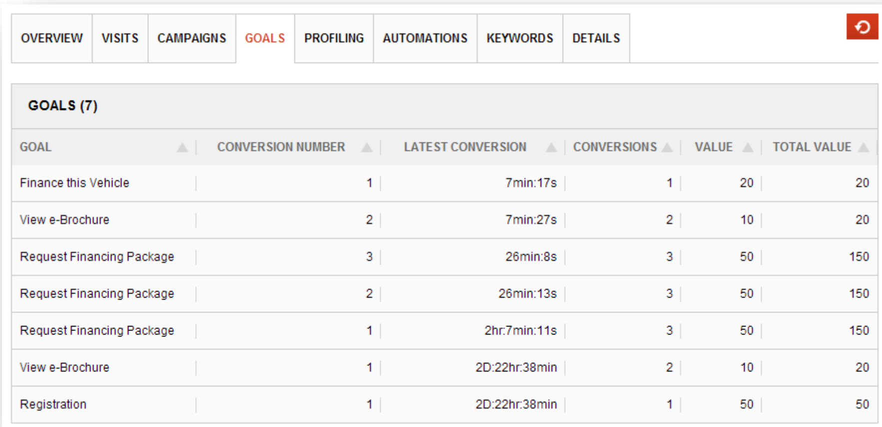
Recent Campaigns contains the most recent campaigns that the contact has signed up for. To go directly to the *Campaigns* tab, click the *See more* link.

To the right of the Overview tab you can see the name and email address of the contact. Click *More info* to see more detailed information about the contact in the Details tab.



Goals tab

The Goals tab consist of a list of goals converted along with other metrics such as total conversions, recency and engagement value collected across all visits.



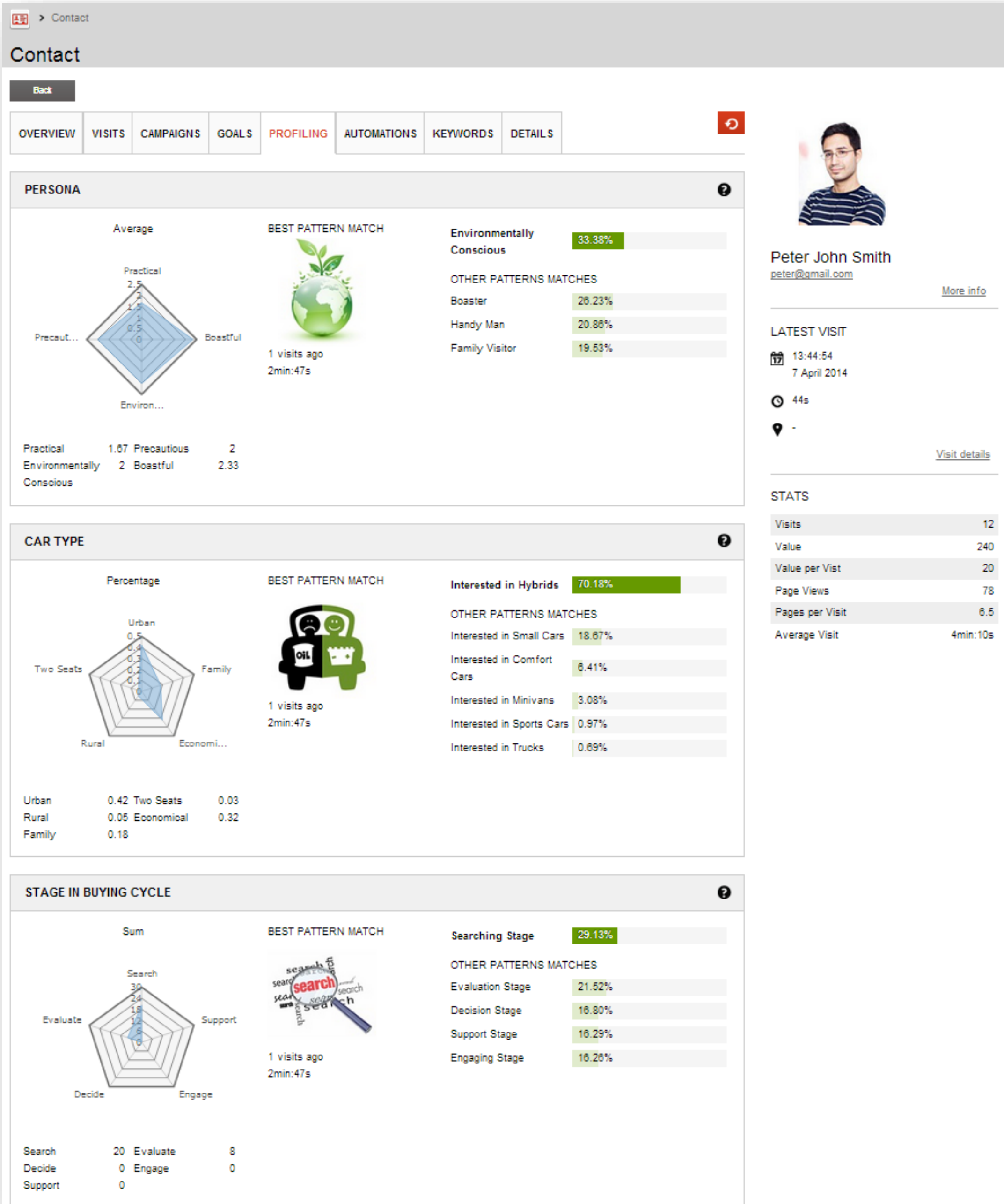
GOAL	CONVERSION NUMBER	LATEST CONVERSION	CONVERSIONS	VALUE	TOTAL VALUE
Finance this Vehicle	1	7min:17s	1	20	20
View e-Brochure	2	7min:27s	2	10	20
Request Financing Package	3	26min:8s	3	50	150
Request Financing Package	2	26min:13s	3	50	150
Request Financing Package	1	2hr:7min:11s	3	50	150
View e-Brochure	1	2D:22hr:38min	2	10	20
Registration	1	2D:22hr:38min	1	50	50

Some of the goals that Peter Smith has converted include downloading an e-brochure and requesting a financing package. In this example, he has accumulated more than 150 engagement value points (total value) during his visits to the car dealership website. A sales person can use this information to learn a lot about the intentions of the contact, based on which goals have been converted, particularly if the accumulated engagement value is high across a small number of visits.

Peter Smith has downloaded several resources over a small number of visits which indicates he is serious about buying a car. A sale representative could offer to call or email him to give advice or to answers any questions he may have that may help him to make a decision.

Profiling tab

The Profiling tab consists of a set of profiles that reflect the current interest the contact has in the content on the website. This is a dynamic set of profile information that can change with each page the visitor views or each action the visitor takes on the website.



In this example, using the car dealership website, Peter Smith is identified as matching an environmentally conscious persona. He seems to also be interested in hybrid cars and is in the searching stage of the buying cycle.

This information changes and adapts each time the contact makes a visit, so that pattern matches are dynamic and therefore constantly change. They reflect the content that the contact has viewed at that moment in time.

Conclusions

What conclusions can a sales executive draw about the data presented in the Experience Profile? Which persona does this example contact most closely match? Is he a future lead that needs more information or advice or is he a customer close to making a purchase?

The example contact, Peter Smith has visited the car dealership website several times, downloaded content, converted multiple goals and signed up for several campaigns. Each time his visits have shown an increasing level of commitment. He most closely matches the environmentally conscious persona, interested in a hybrid car, in the searching stage of the buying cycle who has still not decided to make a purchase.

This information could help a sales executive to decide what action to take next. In this example, the contact may respond well to a personal telephone from a sales consultant to discuss in more detail which model of car would suit him best?

1.4.2 Scenario 2: Customer Service Representative

In this example scenario, a customer service representative receives an enquiry from a known customer.

The customer service representative must be able to access information on the contact quickly in order to get a quick overview of the preferences and experience the contact has had with the website.

Story:

A customer service representative in a car sales company receives a telephone enquiry from a known customer *Peter Smith*. The contact is not sure that he has chosen the right model of car and wants advice about his options. He still has time to change his order before it is dispatched.

The customer service representative needs to find the details of this contact quickly, to become familiar with the experience and preferences of the contact on the website in order to advise him of the best and most suitable options available.

In this scenario you complete the following tasks:

- Open the Experience Profile and find a named contact.
- Use the Experience Profile to gain a quick overview of the experience and preferences of the contact based on previous visits to the website.
- Advise the contact/customer on the choices available and help him come to a decision.

Open the Customer Intelligence Dashboard and find a named contact

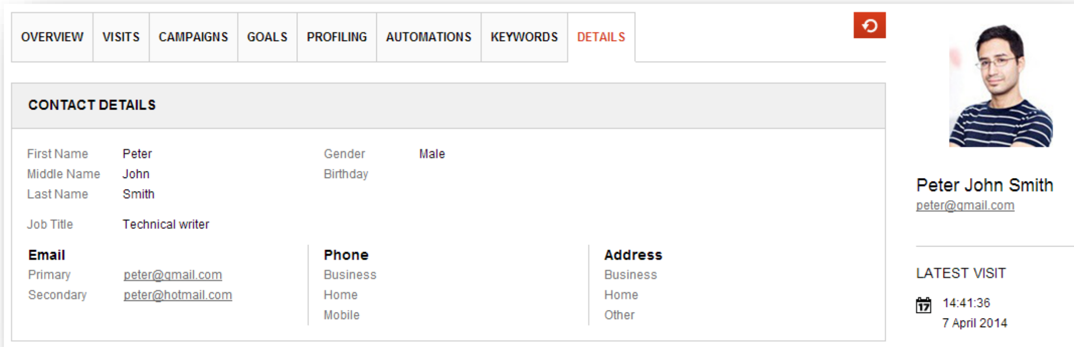
1. A customer service representative receives a phone call from Peter Smith, an existing customer.
2. The representative searches for Peter Smith and then opens the Experience Profile application for this customer.

To see more detailed steps on how to open the Customer Intelligence Dashboard and find a named contact, see Scenario 1.

Gain an overview of the preferences and experience of a contact

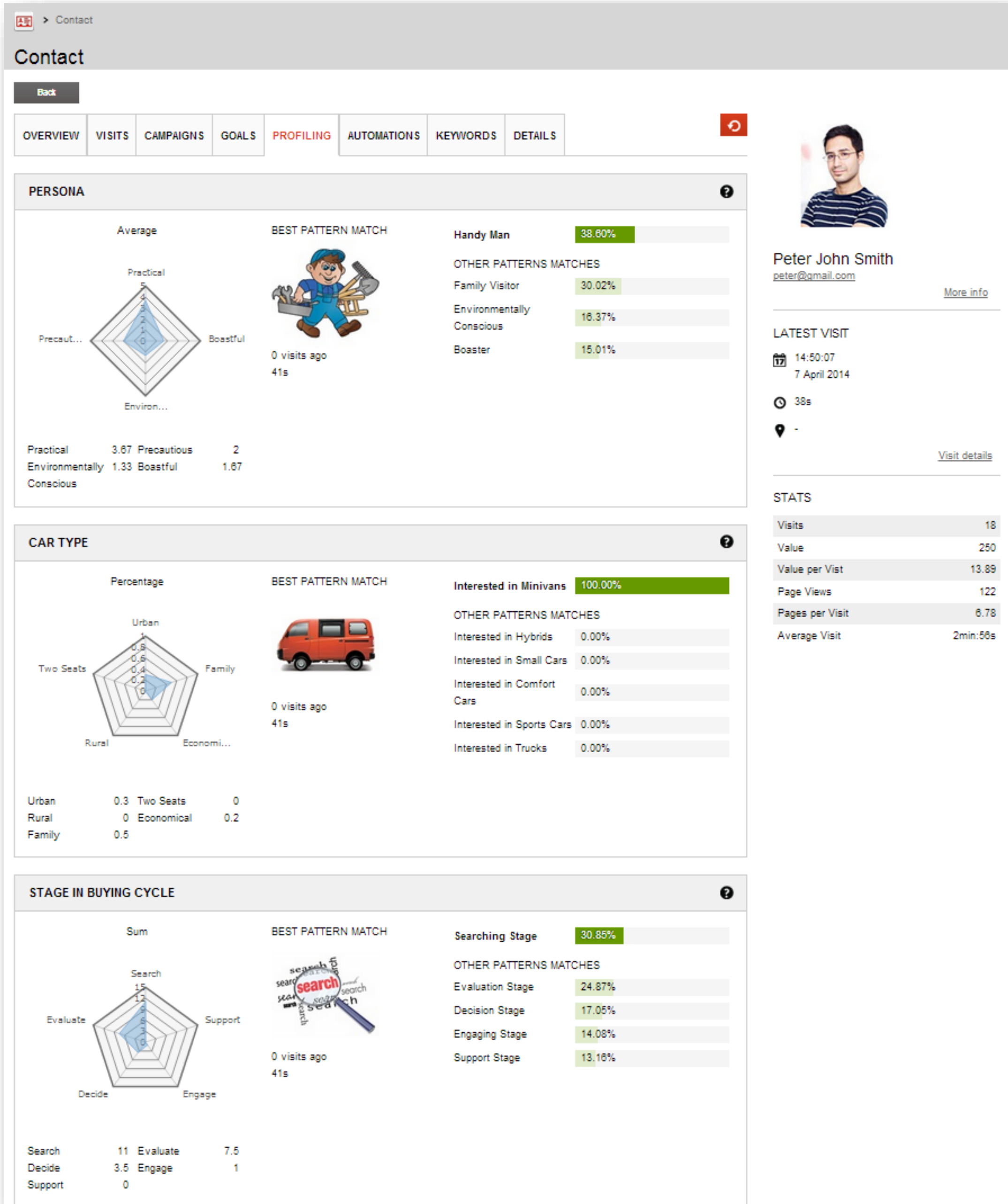
The contact has already placed an order so is now regarded as a customer. Therefore it is important that the customer service representative can quickly and satisfactorily answer any questions that the customer has.

1. On opening the Experience Profile for Peter Smith the customer representative first selects the Details tab and asks Peter Smith to confirm that his contact details are correct.



2. The customer has a question related to the order he has placed. His order is for a large family car but he wants to change it to a family car that is more environmental.
3. The customer service representative can quickly switch to the **Profiling** tab to see the car type preferences and other profile information that enables him to quickly build up a picture of this

contact, so he can quickly and effectively deal with the enquiry.



By studying the Profiling tab the customer service representative can quickly see which persona has the closest pattern match to this contact, the stage reached in the buying cycle and the preferred car type for this contact.

1.5 Configuration

In the xDB™, a page event is something that can be triggered on your website by a visitor or it can be system triggered. For example a visitor completes a campaign sign up form and then clicks submit, this triggers a goal conversion event and a campaign event.

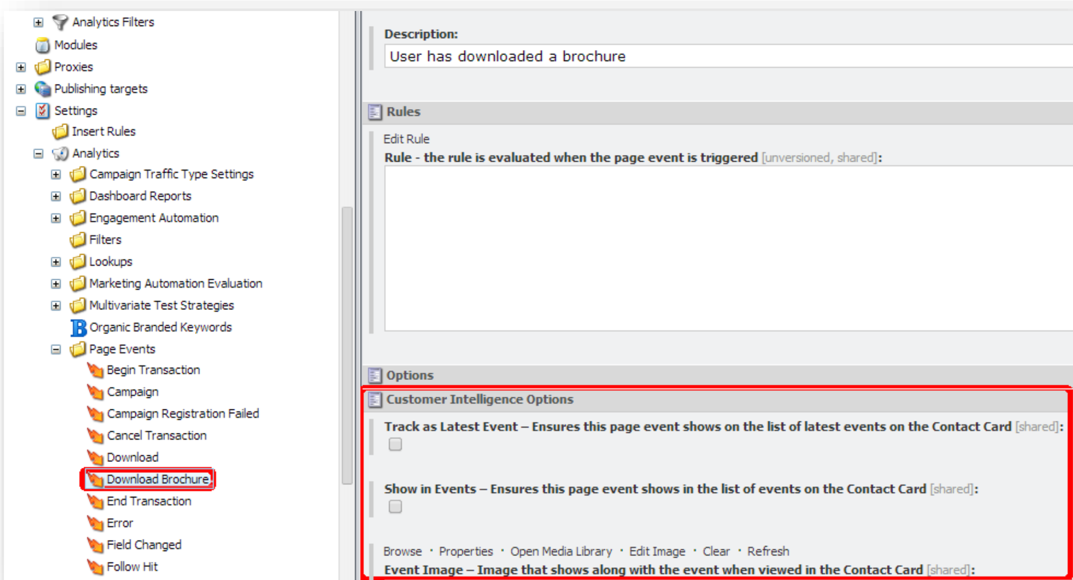
In the Experience Profile, some page events are pre-configured to appear in the *Latest Events* or *Events* panels by default. You change these or add more events yourself using the Content Editor.

1.5.1 Configuring Events

To configure which page events are shown in the Experience Profile:

1. In the Sitecore Desktop, open the Content Editor.
2. In the Content Editor, content tree, navigate to the **Page Events** folder.

   `/sitecore/system/Settings/Analytics/Page Events`
3. Select a page event item to configure, such as *Download Brochure*.



4. In the **Customer Intelligence Options** section, there are two check boxes for tracking page events in the Experience Profile. The following table explains the purpose of these two options:

Customer Intelligence Options	Description
Track as latest event	When this event is triggered by the contact (visitor) it appears in the *Latest Events* panel in the Contact tab.
Show in events	When this event is triggered by the contact (visitor) it appears in the list of *Events* shown in the Visits tab.
Event image	Associate an image with an event.

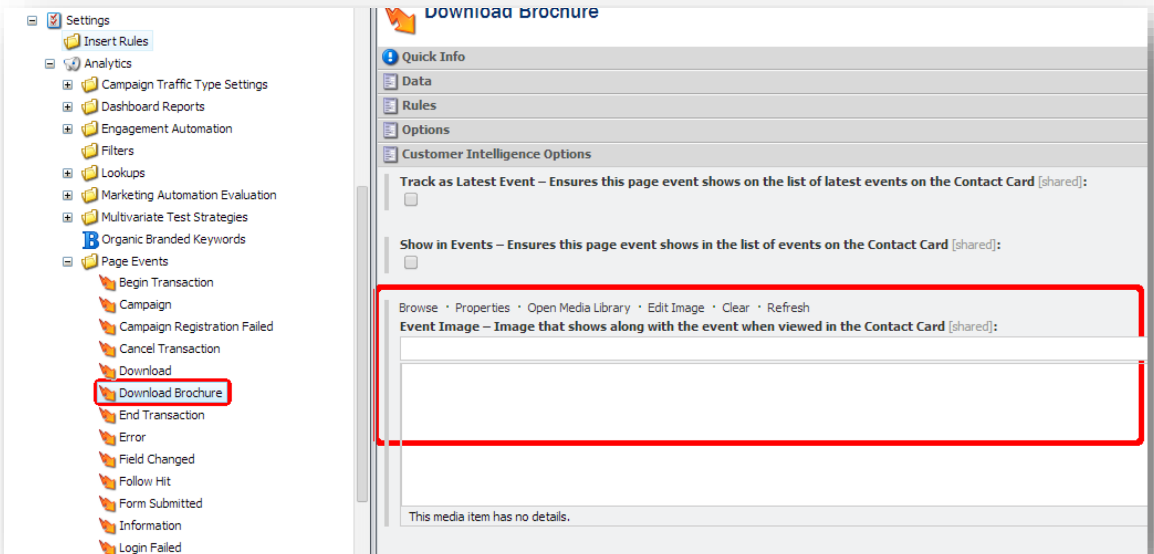
5. Select the **Track as Latest Event** check box.
6. Save your changes.

1.5.2 Adding Icons to Events

You can also configure which icons you want to associate with page events. To change or add an icon to a page event:

1. In the Content Editor, select a page event item to configure such as *Download Brochure*.
2. In the **Customer Intelligence Options** section, click *Browse* to open the **Select Media** dialog box. Select an existing image or choose an image of your own to upload.

   You also have several other options such as edit the image, view properties, open the media library, clear an image or refresh.



3. Save your changes.

1.6 FAQs

Commonly asked questions on using or configuring the Experience Profile.

Which events are displayed by default in the Contact tab?

Any event that a system administrator has configured to be triggered appears in the *Latest Events* panel. To see which events have been configured to appear, in the Content Editor, navigate to: `/sitecore/system/Settings/Analytics/Page Events`. Select an event and view the *Customer Intelligence Options* section. For more information on configuring events, see section 1.5 Configuration.

How many *Latest Events* are displayed by default?

By default, a maximum of 10 *Latest Events* can be displayed in the Contact tab.

What does the *Latest Events* group consist of?

Latest events consist of the top 10 latest events, including the last contact visit plus another 9 distinct types of events. These can include any page event, external keywords and paid search terms used. The default latest events are pre-configured in the Content Editor to appear in the Contact tab, *Latest Events* group. For more information on how to configure events, see section 1.5 Configuration.

How many *Best Pattern Matches* or *Recent Campaigns* are displayed by default?

By default, a maximum of 3 pattern matches and recent campaigns are displayed in the Contact tab by default.

Which image file types are allowed to be used as icons?

You can use all the usual allowed image files types, such as, JPEG, PNG or GIFF.

Is there a recommended image size or resolution for icons?

There is no recommended image size but try to keep icons small with low resolution.

What is the difference between an event and a latest event?

The only difference between events is the way in which they are configured in the Content Editor to appear in the Experience Profile.

In the Content Editor, you can configure events to appear in two different ways:

- *Track as Latest Event* – The event is displayed in the *Latest Events* group on the *Contacts* tab.
- *Show in Events* – The event is displayed in the list of events on the *Visits* tab.

For more information, see section 1.5 Configuration.

Is it possible to see the session trail for a single contact?

Yes, view the *Visit Detail Report* to see details of the session trail. This includes number of visits, pages viewed, search terms used, goals converted and engagement value generated.

Why can't I see any campaigns in the Experience Profile?

Only campaigns triggered on a landing page (the first page visited) appear in *Recent Campaigns*. It is possible that some campaigns for a contact were triggered during the visit and not on the landing page. If you want a campaign triggered during a visit to appear, you can add the *Campaign* event to the *Customer Intelligence Options*. Select the check box *Show in Events* or *Track as Latest Event* (see section.1.5.1 Configuring Events).

Can I see all the devices used by contact?

No, the Experience Profile does not display any specific device information for the contact yet.

Can I search for a contact using phone number, address or organization?

No, you can only search for a contact by name or by email address.

Why in the *Visit Detail Report* do I see the accumulated engagement value as 115, but the sum of all goals in this visit is only 55?

It is not just goals that generate engagement value points. As well as triggering goals, it is also possible for a contact to trigger other events that have engagement value points assigned to them during a visit.

Is it possible to see the referred site for visits with traffic type "*Referred-…*"?

No, it is not possible to see the referred site for this traffic type. For more detail about recent visits and referring sites see the *Engagement Analytics*, *Visit Detail* report or use the *Engagement Intelligence Analyzer*.