



Sitecore CMS 7.0 or later

Executive Dashboard Cookbook

A Marketers Guide to the Executive Insight Dashboard

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Chapter 1

Introduction

The Executive Dashboard Cookbook is for marketers who want to get a high level perspective of Engagement Analytics for their website. This includes Chief Marketing Officers (CMOs) that want an overview of their marketing activities and Search Engine Optimization marketers (SEOs) who want to see at a glance which of their SEO strategies are the most effective.

Engagement Analytics and the Executive Insight Dashboard enables you to measure the quality of your site visits not just the quantity.

This cookbook contains the following chapters:

- **Chapter 1 — Introduction**
This chapter contains an overview of the Executive Insight Dashboard. It explains how to filter the dashboard by timeline or resolution and contains a glossary of terms used in Engagement Analytics.
- **Chapter 2 — Tour of the Executive Insight Dashboard**
This chapter provides a visual overview of the different elements that make up the Executive Insight Dashboard. It includes some guidance on how to use the various charts and dashboards.
- **Chapter 3 — Dashboard Scenarios**
This chapter includes scenarios for marketers. Each scenario explains how using Engagement Analytics and the Executive Insight Dashboard can help marketers to solve key marketing problems.
- **Chapter 4 — Additional Dashboard Functionality**
This chapter describes how to perform additional user actions in the Executive Insight Dashboard. For example, it explains how to export a dashboard or chart to Microsoft Excel, how to view a campaign chart from the Content Editor or how to classify different traffic types.
- **Chapter 5 — Appendix**
This chapter contains a complete list of all dashboards and charts available in the Executive Insight Dashboard.

1.1 Overview

The Executive Insight Dashboard is a Microsoft Silverlight application that you can launch from the Sitecore desktop or iPad to give marketing executives a quick high level overview of website traffic and marketing campaign effectiveness.

Note

The Executive Insight Dashboard for Sitecore CMS 7.0 runs on Silverlight 5.

1.1.1 Dashboard Types and Charts

You can select dashboards on traffic types or campaigns. A different set of charts or dashboards are available depending on your selection. Use these charts to analyze your website data in more detail.

Summary list of the charts available in the Executive Insight Dashboard:

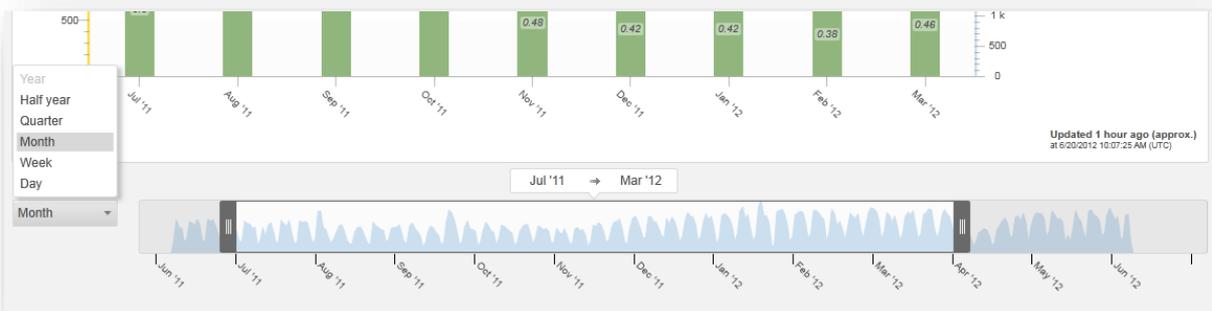
- **Traffic**
 - Value
 - Visits
 - Value per Visit
 - Channel Performance
 - Brand Awareness
 - Source Value
 - Source Value per Visits
 - Referring Sites
 - Search Keywords
 - Entry Pages
 - Site Search
 - Assets Consumed
 - Goal Conversions
- **Campaigns**
 - Value
 - Visits
 - Value per Visit
 - Campaign Performance
 - Referring Sites
 - Campaigns
 - Search Keywords
 - Entry Pages
 - Site Search
 - Assets Consumed
 - Goal Conversions

For a complete list of all dashboards and charts available in the Executive Insight Dashboard, see the Appendix List of all Dashboards.

1.1.2 Timeline and Resolution

Filter dashboards by date using the timeline and resolution controls. The timeline controls enable you to use a slider to select a specific date range and resolution enables you to view the data by *Year*, *Half year*, *Quarter*, *Month*, *Week*, or *Day*.

For example, if you choose *Month* you can use the slider to select one or more months. If you select *Quarter* then you can select one or more quarters as your chosen time period. The selected period is highlighted in white. Data that is not part of your selection is still visible in the timeline but appears grayed out.



You can select any time resolution from one day to one year, even if the data for that time period is incomplete. This makes it possible for you to highlight trends while data is still incomplete. The data for the incomplete period appears in a lighter shade that complete periods.



If you select the day resolution, the maximum range available is 61 days.

In some traffic and campaign charts the lowest time resolution available to view data is by *Month*. The data is grouped in this way on the server.

This only applies to the following charts:

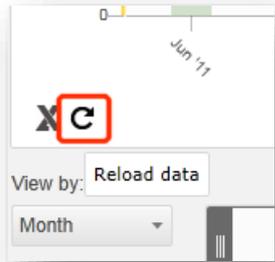
- Campaigns
- Referring Sites
- Search Keywords
- Entry Pages
- Site Search
- Assets Consumed

- Goal Conversions

Therefore it is not possible to view these charts by *Week* or *Day*.

1.1.3 Reloading Data

If you click the *Reload data* button, all the data in the dashboard or chart you are currently viewing is updated with the latest data available from the server.



By default all data in the dashboard is updated automatically every 24 hours. Use the Reload data button if you want to see more recent data. An administrator or developer can change the default setting.

For more information on reloading data, see [Reloading Dashboard Data](#).

1.2 Engagement Analytics Terminology

In the Sitecore Engagement Analytics, there are several terms and phrases used to describe how visitors interact with a website. The more familiar you are with these terms and phrases, the better equipped you will be to interpret the dashboards and charts in the Executive Insight Dashboard.

1.2.1 Visitor

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

1.2.2 Visit

A visit consists of all the actions a visitor takes from the moment they enter a website until the moment they leave. These actions consist of all pages viewed, and resources consumed, such as campaigns triggered and conversions achieved. The dashboard counts visits and the value of visits over a specific time period and displays this data in a number of different charts.

More detailed information about each visitor session is available in the Engagement Analytics *Visit Detail* report which you can also access from the Sitecore Desktop.

1.2.3 Conversation

When you meet with a customer online, you are essentially engaging in a conversation. An exchange of communication and commitment is taking place.

1.2.4 Engagement Value

The level of commitment exhibited by your customer is the secret ingredient of quality called the *Engagement Value*. Each visit produces an engagement value calculated from all the resources a visitor consumes during one or multiple visits. Resources consumed can include goals, campaigns or forms submitted.

You can allocate a numeric value or points to each resource on your website using the *Points* field. Only apply points to pages that require commitment from a visitor. For example, registering on a website shows commitment, just reading or downloading a white paper does not.

The Points field in the Marketing Center:



Goals and page event content items contain a *Points* field into which you can enter a value. Sitecore Engagement Analytics uses this number to calculate an overall value for a visit. As a visitor navigates around the website achieving various goals and triggering different page events the value of their visit is calculated. When a visitor leaves the website their total accumulated points for the visit are displayed in the Executive Insight Dashboard as the *Engagement Value*.

1.2.5 Engagement Value Points

Engagement value points or EVPs are the key to engagement analytics. There is a *Points* field in every goal or page event content item to which you can assign a numeric value. A visitor accumulates points depending on what actions they take when they visit a website.

For example:

- Newsletter Registration - 25 Engagement Value Points
- Online Pricing Quote - 50 Engagement Value Points
- Request for Demo - 100 Engagement Value Points

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

The number allocated to each goal is not important but the ratio between EVPs is. For example, the marketer must understand why *Request for Demo* is four times more valuable than *Newsletter Registration*.

1.2.6 Efficiency

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

Formula:

Value per visit = Value/Visits

1.2.7 Potential

Potential quantifies how much value your organization could gain if you managed to increase the value per visit of a page up to the same level as the site average.

Formulas:

Potential value gain = (Average Value per Visit – Value per Visit) x Number of Visits

Potential = Potential value gain *100 / Sum(All facets Values)

Obviously some pages should and will always have a high Potential, but if you create a landing page that you think will make a significant contribution to the website and it turns out to have a high Potential, then you need to re-examine it.

Note

In pop-up charts that display potential value gain, numbers are rounded off to two decimal places with the exception of numbers between - 0.5 and + 0.5.

If the potential value gain is between 0 and 0.5, the pop-up chart displays this as < 0.5 (less than 0.5).

If the potential value gain is between -0.5 and 0, the pop-up chart displays this as > -0.5 (greater than -0.5).

1.2.8 Traffic Types

In Engagement Analytics, the Executive Insight Dashboard segments all your website visitors by traffic type.

The different types of traffic coming to a website are normally difficult to segment and analyze, such as *News*, *Conversations* and *Community* (see the Traffic Type table for definitions).

In the Executive Insight Dashboard, you have the option to view charts for all traffic types or each individual traffic type. Categorizing visits as traffic types makes it easier to measure the real value of visits (engagement value), efficiency and traffic for every site visit.

See the *Performance Channel* chart for an overview of the performance of each traffic type.

Segmentation by traffic type enables you get the information you need to effectively analyze the traffic on your website and to make the right future marketing decisions. For example, SEO marketers can find this information useful when optimizing search key words.

See also, *Channels*.

Executive Insight Dashboard traffic types:

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

1.2.9 Channels

The different marketing activities in a business or organization are known as communication channels.

Communication channels can be traffic types, such as Search Engine - Organic, Direct, or Email or they could be other marketing activities unrelated to a website, such as a traditional print media campaigns.

In the Executive Insight Dashboard, channels refer to the categories of traffic coming to your website, so in this case traffic types and channels can almost be thought of as the same thing.

You can view charts for each traffic type or you can view the Channel Performance chart to get an overview of the performance of all the traffic types coming to your website.

Chapter 2

Tour of the Executive Insight Dashboard

This chapter provides you with a tour of the main visual elements and controls in the Executive Insight Dashboard.

- Dashboard Descriptions
- Tour of the Dashboard Interface

2.1 Dashboard Descriptions

This section contains a table describing each of the charts available in the Executive Insight Dashboard.

The dashboard contains the following categories:

- Campaigns
- Traffic

The category column indicates whether the chart is available in *Campaigns*, *Traffic* or both.

Dashboard	Category	Description
Value	<ul style="list-style-type: none"> • Campaigns • Traffic 	<p>A pie chart displays the Value generated by visits for all traffic types or campaigns.</p> <p>Use this dashboard to get an overview of the value generated by each traffic type or campaign.</p> <p>When you click on a pie chart segment for a single campaign or traffic type the trend table will show you the Value that campaign or traffic type has generated as a percentage of the total Value generated on the website.</p>
Visits	<ul style="list-style-type: none"> • Campaigns • Traffic 	<p>A combination chart that displays the number of Visits, Value generated and Efficiency (Value per Visits) for all traffic types and campaigns. Combination charts contain both line and bar charts.</p> <p>Use this dashboard to get an overview of Visits and marketing effectiveness. Compare the number of Visits with Value and Efficiency (Value per Visits) generated to determine the marketing reach and effectiveness. For example, if visits line is increasing at a faster rate than the value line, then your marketing is increasing the number of visitors, but your marketing effectiveness is decreasing. This will be shown by a decrease in the height of the Efficiency bar.</p> <p>This dashboard also contains a pie chart showing the percentage contribution made by each campaign or traffic type.</p>

Dashboard	Category	Description
Value per Visits	<ul style="list-style-type: none"> • Campaigns • Traffic 	<p>A horizontal bar chart that displays more detailed information about the Efficiency (Value per Visits) of Visits for each traffic type or campaign.</p> <p>Use this dashboard to get an overview of Efficiency. Find out which campaigns or traffic types have generated the most relevant visits.</p> <p>Efficiency enables you to get an overview of marketing effectiveness and is calculated using the following formula: $\text{Value per Visit} = \text{Value} / \text{Visits}$</p> <p>This dashboard also includes a Trend table that allows you to compare Efficiency over time. For example, you can compare the selected quarter with the same quarter from a year ago.</p>
Channel/Campaign Performance	<ul style="list-style-type: none"> • Campaigns • Traffic 	<p>A stacked area chart where each color represents a different marketing channel (traffic type) or campaign.</p> <p>The drop down enables you to view Visits or Value for each channel or campaign. The key shows which channel or campaign each color represents.</p> <p>Use this dashboard to get an overview of the performance of all your marketing channels or campaigns.</p> <p>You can select all or an individual channel or campaign. For example, if you select a single marketing channel such as <i>Search engine – Organic</i>, the dashboard enables you to compare it with the sum of all the other remaining marketing channels.</p>

Dashboard	Category	Description
Brand Awareness	<ul style="list-style-type: none"> Traffic 	<p>A combination chart that displays Visits with Value and Efficiency (Value per Visits) generated for the <i>Search Engine - Branded</i> traffic type.</p> <p>Use this dashboard to get an overview of visitor brand awareness. For example, low brand awareness may indicate that you need to do more to promote the company brand.</p> <p><i>Search Engine - Branded</i> infers brand awareness when a visitor comes to the website using a brand specific search term in a search engine, such as <i>Sitecore</i> or <i>Sitecore CMS</i>. <i>Direct</i> traffic comes from visitors that may be more aware of the website as a brand because they enter the full address into the browser. This enables you to compare awareness of the company brand with the website brand.</p> <p>This dashboard also contains a pie chart that compares the percentage Value generated by the <i>Direct</i> and <i>Search Engine – Branded</i> traffic types. Move the mouse over a wedge in the pie chart to see the label and percentage.</p> <p>The Brand Awareness dashboard is only available for traffic types.</p>
Source Value	<ul style="list-style-type: none"> Traffic 	<p>This pie chart displays more detailed information about the first point of contact for a site visitor (the visitor's first "source" of contact). It shows which traffic types have led to the highest Value visits.</p> <p>Use this dashboard to get an overview of Source Value. Find out which traffic types lead to the highest Value visits. This can help you to assess which of your traffic types are the most effective.</p> <p>This dashboard also includes a Trend table that allows you to compare Source Value over time.</p>
Source Value/Visits	<ul style="list-style-type: none"> Traffic 	<p>This horizontal bar chart shows which traffic types were the first point of contact and have led to the highest Efficiency (Value per Visits) Visits.</p> <p>Use this dashboard to learn which traffic sources lead to the most relevant visits. This can help you to assess which of your traffic types are most effective.</p> <p>This dashboard also includes a Trend table that allows you to compare Source Value/Visits over time.</p>

Dashboard	Category	Description
Referring Sites	<ul style="list-style-type: none"> • Campaigns • Traffic 	<p>A horizontal bar chart showing the websites that referred visitors to your site.</p> <p>Use this information as part of your SEO search strategy. These referral sources may be the sources your target audience use the most.</p> <p>The default view shows which referring sites led to the highest value visits ranked by Value.</p>
Campaigns	<ul style="list-style-type: none"> • Campaigns 	<p>A horizontal bar chart showing the most successful campaigns on your website.</p> <p>Use this dashboard to identify successful or failing campaigns.</p> <p>The default view shows which campaigns led to the highest value visits ranked by Value. This chart is not available when viewing traffic.</p>
Search Keywords	<ul style="list-style-type: none"> • Campaigns • Traffic 	<p>A horizontal bar chart showing the most popular search keywords used in search engines to find your website.</p> <p>Use this dashboard as part of your SEO keyword optimization strategy to identify which keywords are most effective. Sort by Potential to see which have the most future potential.</p> <p>The default view shows keywords that led to the highest value visits ranked by Value.</p>
Entry Pages	<ul style="list-style-type: none"> • Campaigns • Traffic 	<p>A horizontal bar chart showing the most popular entry pages for visitors and the Value they generated.</p> <p>Use this dashboard to help identify pages that lead to the highest value visits and to also identify underperforming pages. Sort by Value per Visits or Potential to learn which entry pages are most effective and which have the greatest Potential for improvement.</p> <p>The default view shows which entry pages led to the highest value visits ranked by Value.</p> <p>An entry page could be a landing page created for a specific campaign or a page referred by another website.</p>

Dashboard	Category	Description
Site Search	<ul style="list-style-type: none"> • Campaigns • Traffic 	<p>A horizontal bar chart showing the most popular search words or phrases used on the website to find content relevant to site visitors.</p> <p>Use this dashboard to find out which content visitors search for the most on your website. This could help when optimizing your website. For example, it may indicate that you could improve navigation or that you may need to add new pages for the content visitors are searching for.</p> <p>The default view shows which search words or phrases led to the highest value visits ranked by Value.</p>
Assets Consumed	<ul style="list-style-type: none"> • Campaigns • Traffic 	<p>A horizontal bar chart showing which assets were downloaded the most and which led to the highest value visits.</p> <p>Use this dashboard to assess which assets you want to track in engagement analytics. For example, it may be appropriate to make the downloading of a white paper a goal and assign it points.</p> <p>The term 'assets consumed' refers to visitors downloading brochures, white papers and other assets from the website during a visit. When a visitor downloads a brochure it shows a higher level of commitment on the website than just viewing pages. The assets that are downloaded more frequently may indicate topics of higher interest.</p> <p>The default view shows which assets visitors consumed the most during high value visits ranked by Value.</p>
Goal Conversions	<ul style="list-style-type: none"> • Campaigns • Traffic 	<p>A horizontal bar chart showing which goals had the most conversions and generated the highest value visits on the website. Goal conversion means that a goal set by the marketer was accomplished by the visitor.</p> <p>Use this dashboard to optimize your goal strategy. For example, knowing which conversions generate the highest value on your website may help you to evaluate whether you have set suitable goals and set an appropriate amount of points for each goal.</p> <p>The default view shows which goals were converted and which led to the highest value visits ranked by Value.</p> <p>You can also see which goals generated the most Visits, the most relevant visits (Value per Visits) and which goals show the most Potential.</p>

2.2 Tour of the Dashboard Interface

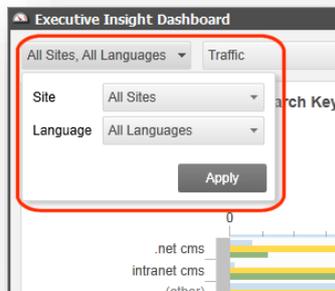
The Executive Insight Dashboard enables you to view and analyze website traffic and marketing campaigns on your website.

The dashboard interface consists of:

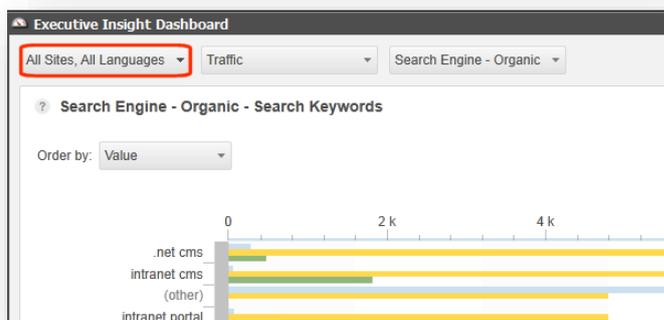
- Site and language selection
- Dashboard data selection
- Charts
- Help text
- Timeline/Resolution filters

2.2.1 Site and Language

The sites and languages drop-down enables you to filter the dashboard by website or language. The drop-down could contain several different websites and offer a number of different languages.



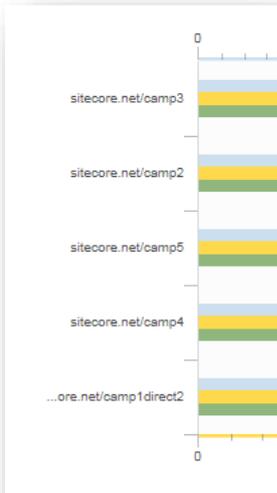
Once you have made a selection, the dashboard displays your website and the language choice.



This feature could benefit business users that want to open two different websites and compare data. You can have more than one instance of the dashboard open in multiple browser windows.

In the *Site* drop-down, you can select a single website or you can select *All Sites*. If you choose *All Sites*, then the dashboard displays data from multiple sites simultaneously. If you select *All Sites*, the *Entry Pages* chart also adds a prefix to items in the chart with the name of the website that it refers to.

The following example shows *Entry Pages* for *Sitecore.net*.



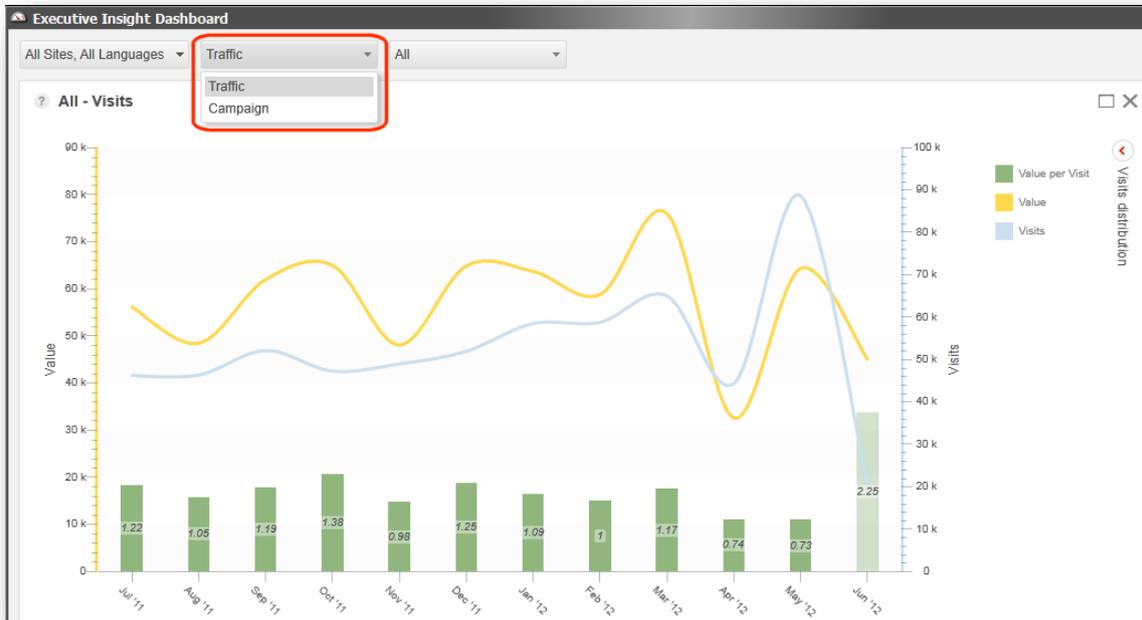
Note

This example uses the host name *Sitecore.net*; however you may prefer to create your own abbreviated site names. A developer or administrator can set the site name for you in the web.config.

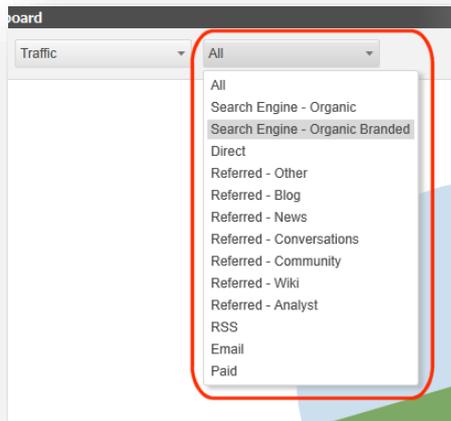
2.2.2 Dashboard Data Selection

Use the drop-down to select either *Traffic* or *Campaign* data.

The dashboard data selection drop-down:

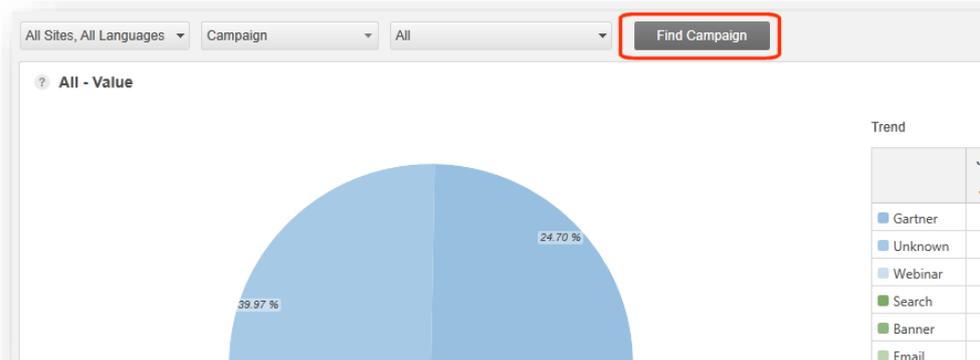


Once you have decided between campaigns or traffic, you can then make a more detailed selection. For example, you can choose an individual traffic type or a specific campaign.

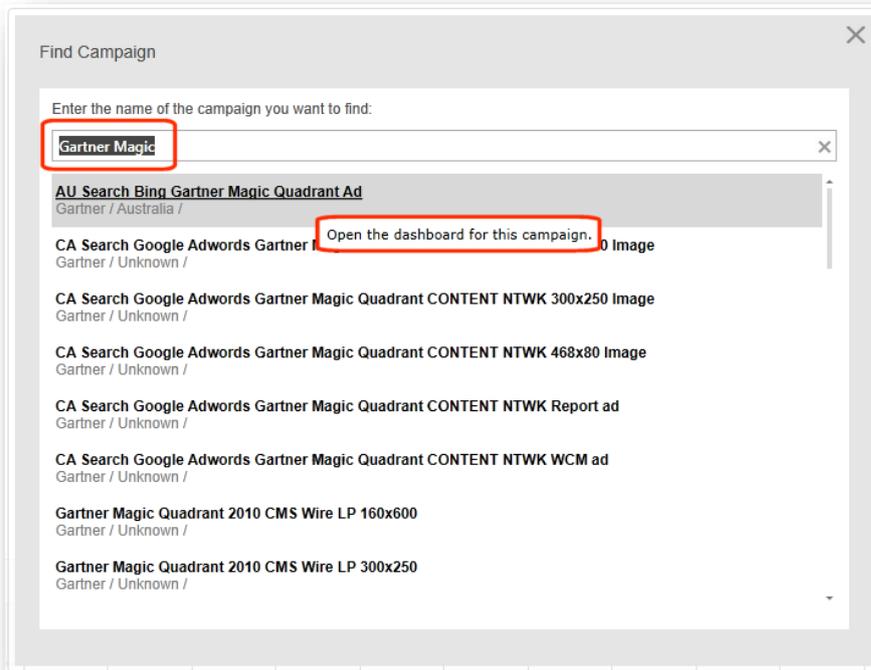


2.2.3 Campaign Search

Click *Find Campaign* to search for a campaign.



In the *Find Campaign* dialog box, enter the name or part of the name of the campaign you want to find.



Search results are displayed below the search box as you type. Click on one of the search results to open the dashboard chart associated with the campaign.

2.2.4 Charts

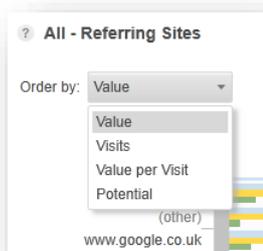
The list of charts available on the right hand side of the dashboard changes depending on whether you choose to view campaign or traffic data.

The Referring Sites chart for the Search Engine - Organic traffic type:



When you select a chart, you can also use the *Order by* drop-down to sort the data by:

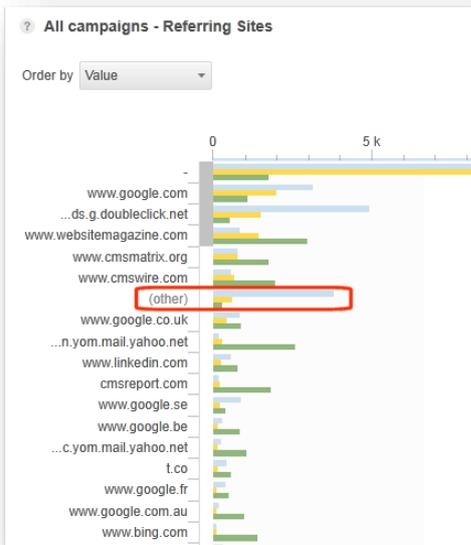
- Value - Orange
- Visits – Light blue
- Value per Visit - Green
- Potential – Orange (appears in a separate chart)



(Other)

When you select a chart, such as *Referring Sites*, you see a list of items (in this case websites) in the left hand axis of the chart that you can sort by *Value*, *Value per Visits*, *Visits*, or *Potential*.

One of these items is called 'Other'.



'Other' contains all the data that remains after applying the following filters to the chart:

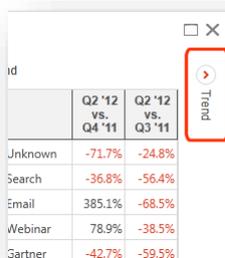
- The time period that you set using the timeline and the *View by* drop-down.
- Order by – sort by Value, Value per Visits, Visits, or Potential.
- The `MinimumVisitsFilter` – this filter discards statistically not relevant data. The default value is 50.
- The `ChartItemsTopNumber` filter – this defines the number of results to display in the dashboard, the default value is 50.

After applying these filters, any data that is not included in the main chart appears under (other).

Note
Both the `MinimumVisitsFilter` and `ChartItemsTopNumber` filters are contained in the `Configuration.config` file and run automatically when you open a chart. If you want to change any of the default values or settings in these files, contact your system administrator.

Trend Table

In some overview charts (*Value, Value per Visits, Source Value and Source Value per Visit*), you can show or hide the trend table. To do this, click the **Trend** button in the top right the chart.

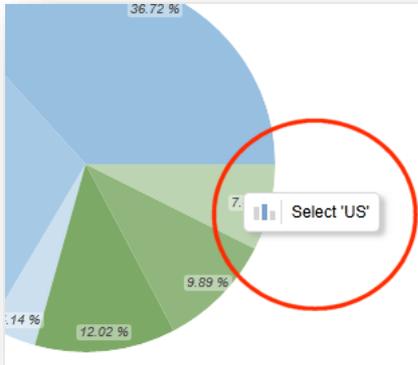


id	Q2 '12 vs. Q4 '11	Q2 '12 vs. Q3 '11
Unknown	-71.7%	-24.8%
Search	-36.8%	-56.4%
Email	385.1%	-68.5%
Webinar	78.9%	-38.5%
Gartner	-42.7%	-59.5%

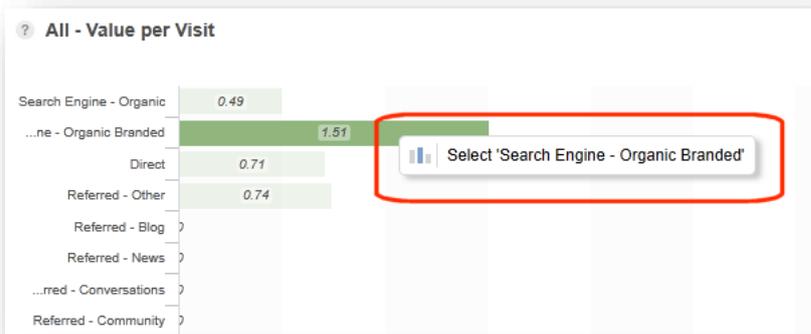
Drilling down into Charts

If you want to drill down to see more detail in a chart, right click on any campaign or traffic type chart.

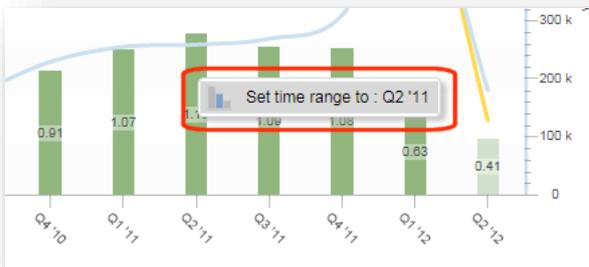
For example, to drill down into the *Gartner* campaign for the *US*, right click the *US* segment in the chart and click *Select 'US'*.



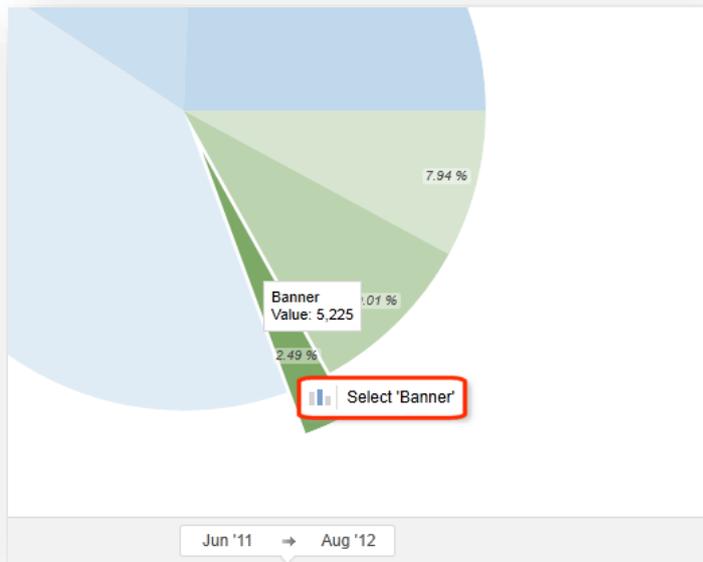
To drill down into the *Search Engine – Organic Branded* traffic type, first select *Traffic, All*, then right click the *Organic Branded* bar.



Right click on a bar in a Visits chart to drill down into a specific timeline range. In the following example, right click Q2 '11, to drill down into the second quarter of 2011.



Right click to drill down into a campaign category to view pie charts for the sub campaign categories.



When you reach the lowest level in the hierarchy, instead of a pie chart you see a message showing the total value in that category and asking you to view the Campaigns chart for more detail.

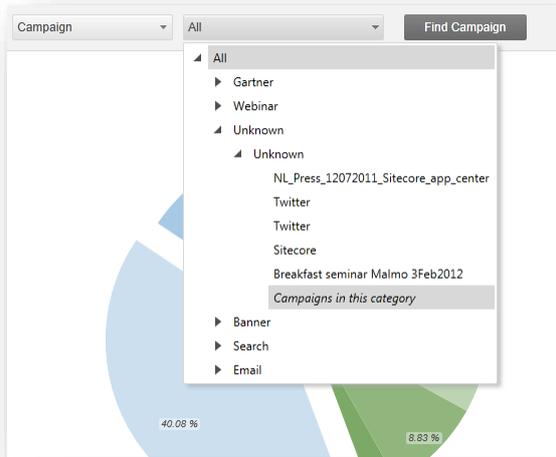
Example message that is displayed when you drill down and reach the lowest level in the hierarchy of campaign categories:

The screenshot shows the Sitecore dashboard interface. At the top, navigation menus include 'website, All Languages', 'Campaign', and 'Banner / US / Campaigns in this category'. A 'Find Campaign' button is also visible. The main content area displays a message box: 'Banner / US / Campaigns in this category' with 'Campaigns total value = 465' and a link to 'Open Campaigns report for more detailed information.' On the right sidebar, a 'Campaigns' button is highlighted with a red box. The dashboard also shows various analytics widgets like 'Value', 'Visits', and 'Value per Visit'.

2.2.5 Campaign Categories

In the dashboard, you can view campaigns as pie charts or bar charts. To view a campaign chart, select *Campaign* and then use the campaign category drop-down to select a category from the tree. The tree can only display campaign categories.

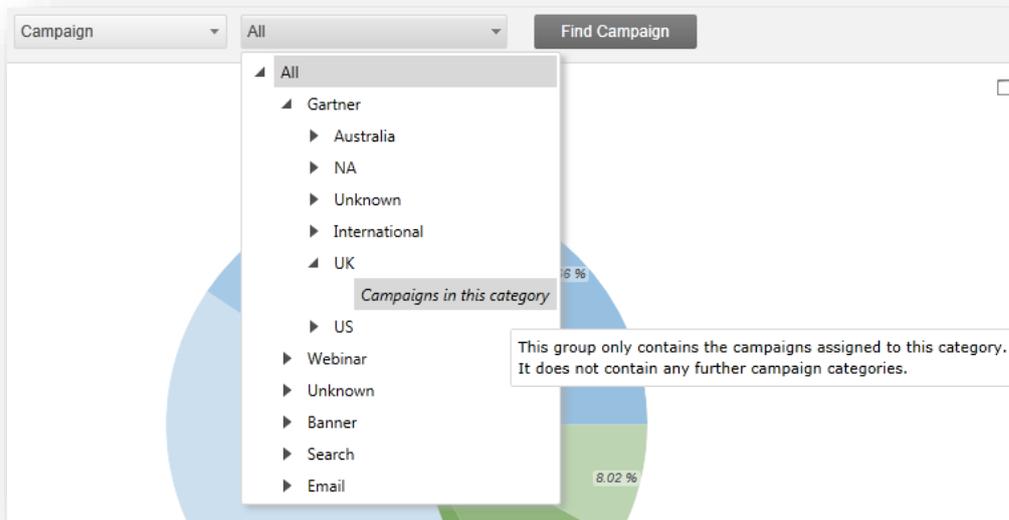
The dashboard campaign category tree:



The campaign category tree has three levels of campaigns that correspond to the categories you create in the Marketing Center. When you create a new campaign you assign it to one of these campaign categories.

Expand the tree to see all three levels of campaign categories. Select the third level category to see a chart containing all the campaigns assigned to this category. If there is no a third level category, then a logical group is created automatically called *Campaigns in this category*. Select this group to see only the campaigns assigned to this category and not from any other category. This group appears below the second level if there is no third level category and at the first level if there is no second level category.

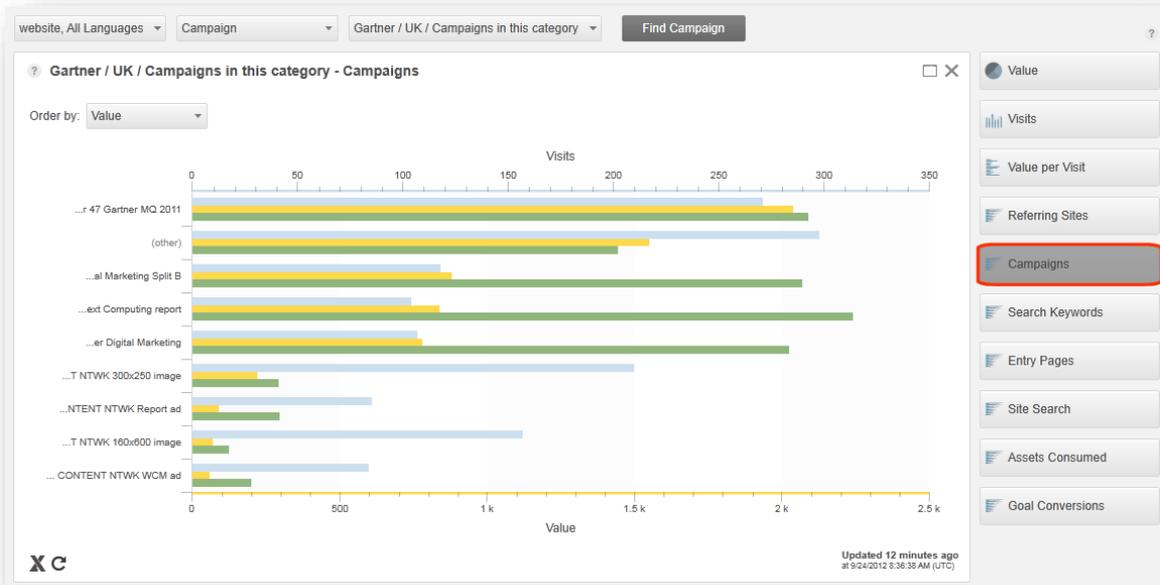
In the following example, there are two categories (*Gartner, UK*) but there is no third level category, so the campaigns are put in the logical group *Campaigns in this category*.



In the campaign category tree, first select *Campaigns in this category* to see the total value generated by these campaigns.



Then click *Campaigns*, to view the chart that displays all the campaigns in the *Campaigns in this category* group.



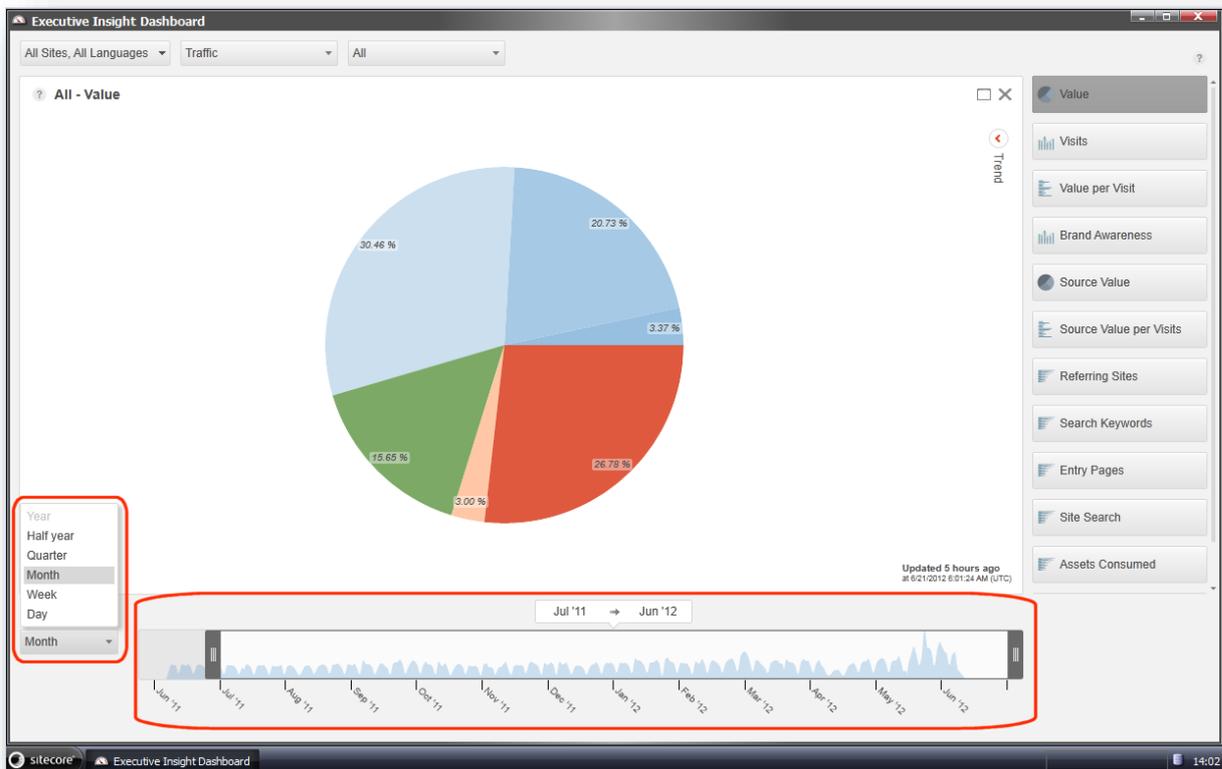
Note
When you click on *Campaigns in this category* you only see the campaigns assigned to this category and not campaigns from any other category or sub category.

2.2.6 Timeline and Resolution

You can filter dashboards by time period using the timeline control or by resolution using the drop-down control:

- Year
- Half Year
- Quarter
- Month
- Week
- Day

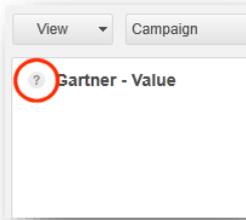
Timeline and resolution filters:



The dashboard timeline and resolution controls are configurable. You can ask an administrator or developer to create different timeline resolutions or to make a wider range of data available.

2.2.7 Help

Click the Help icon to view Help text.



You can view help text for the entire dashboard or when viewing individual charts.

Value

The pie chart displays the value generated by visits for all traffic types or campaigns.

Use the Value dashboard to get an overview of the value generated by each traffic type or campaign.

When you click a pie chart segment for a single campaign or traffic type, the trend table shows you the value that the campaign or traffic type has generated as a percentage of the total value generated on the website.

	Jun '12 vs. Jul '11	Jun '12 vs. Jul '11
Unknown	-80.2%	-80.2%
NA	-95.9%	-95.9%
International	-61.9%	-61.9%
UK	-80.0%	-80.0%
Australia	-91.7%	-91.7%
US	-	-
Overall Trend	-88.9%	-88.9%

2.2.8 Advanced Features

Some dashboard charts have additional options:

- Classify Traffic Types
- Export to Excel Spreadsheet
- Reload data
- Open Visit report

Export to Excel, Open Visit report and Reload data buttons:



The options available vary slightly depending on which dashboard or chart you are viewing.
For more information on using these features, see the section *Additional Dashboard Functionality*.

Chapter 3

Dashboard Scenarios

This chapter presents several scenarios to illustrate how different marketers can use the Executive Insight Dashboard to solve key marketing problems.

- Overview
- Charts for Chief Marketing Executives
- Charts for SEO Marketers
- Charts for Marketing Campaign Managers

3.1 Overview

This chapter explains how to use the Executive Insight Dashboard to get an overview of your different marketing activities.

The scenarios in this section are for the following types of marketers:

- Chief Marketing Officers (CMOs) – Interested in general charts that provide an overview of all marketing activities.
- Marketing Campaign Managers – Responsible for managing campaigns. Interested in charts that give an overview of the performance of different campaigns.
- SEO Marketers – Responsible for search engine optimization. Interested in charts that show which keywords and landing pages have the most impact on a website.

This chapter does not attempt to cover all the dashboards and charts that are available but instead attempts to illustrate how to solve some typical problems faced by marketers.

With an understanding of Engagement Analytics and how to use the Executive Insight Dashboard you can get a clearer picture of all your marketing activities enabling you to make more informed decisions about how to allocate your marketing resources. In the Executive Insight Dashboard you can immediately see the impact of your marketing decisions on your website enabling you to fine tune your strategies more accurately.

3.2 Charts for Chief Marketing Executives

In the Executive Insight Dashboard there are several charts that enable CMOs to spot trends in the performance of their website and online campaigns. In this section we focus on the following charts:

- Value
- Visits
- Value per Visits
- Channel Performance

Using Engagement Analytics and the Executive Insight Dashboard it is possible for chief marketing executives to see at a glance where and how they could improve the marketing effectiveness of their website.

3.2.1 Assessing the Overall Marketing Effectiveness of your Website

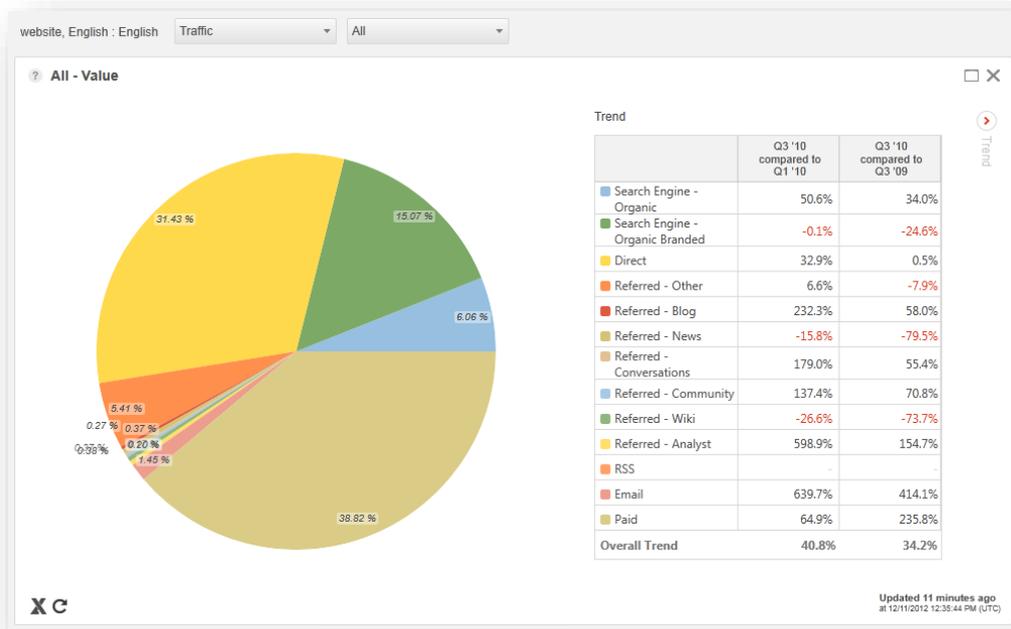
Scenario

CMOs want to know which charts in the Executive Dashboard show how successful their web marketing activities have been and if necessary where and how to make changes to improve future marketing activities.

Value Chart

In the Executive Dashboard select *Traffic*, *All*, and then select the *Value* chart.

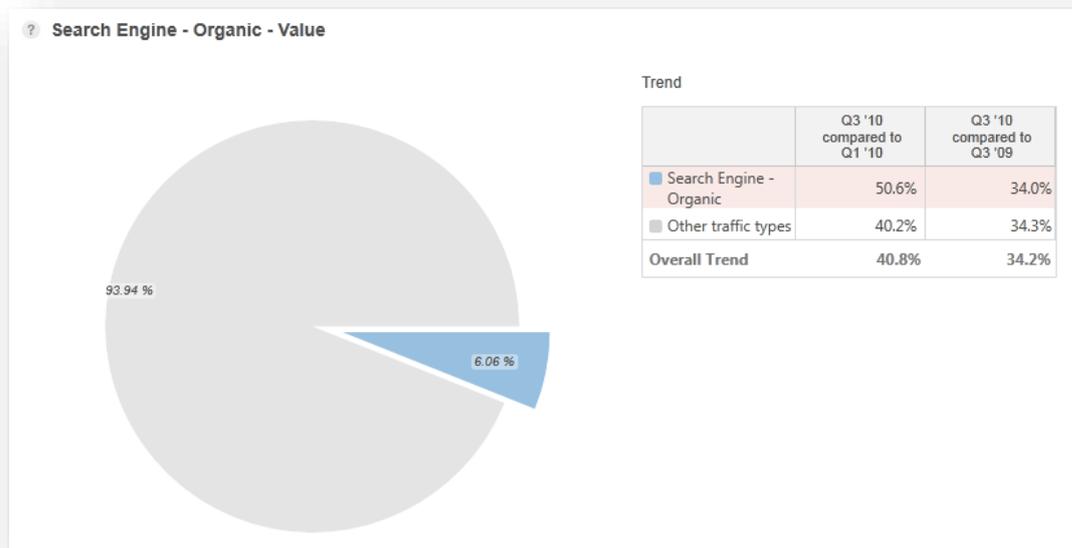
Traffic, All, Value Chart:



The *Value* chart enables a CMO marketer to see at a glance the marketing effectiveness of their website. Each segment in the pie chart represents a traffic type and the percentage value that each marketing channel brings to the website.

In this example, *Search Engine - Organic* traffic accounts for 6.06% of the total value generated on the website. This means that of all the points accumulated by visitors during the selected period, 6.06% came from search engine searches using non-brand specific search terms.

Right click *Search Engine - Organic* to drill down further into this traffic type:



The *Value* pie chart gives the CMO marketer a clear visual representation of the percentage value of each traffic type providing a quick overview of which marketing channels are performing well and which need more attention.

If you look more closely at the *Trend* table you can see that *Search Engine - Organic* traffic is up by 34% compared with a year earlier and is up by 50.6% if you compare the first and last quarters of the period selected.

All Traffic Types – Trend table:

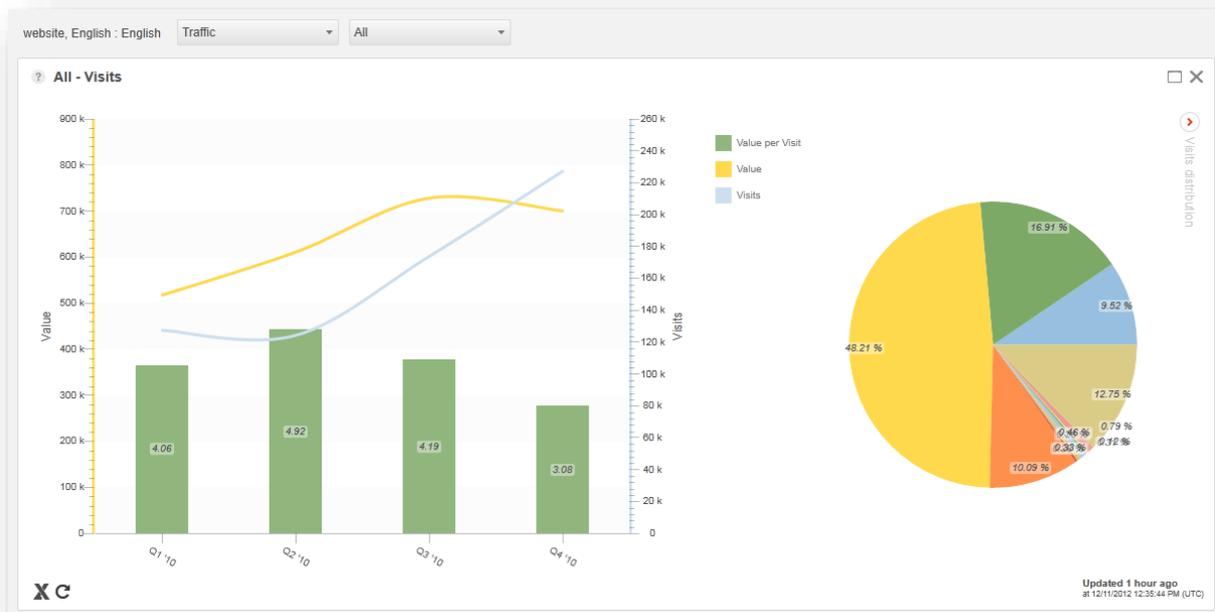
	Q3 '10 compared to Q1 '10	Q3 '10 compared to Q3 '09
Search Engine - Organic	50.6%	34.0%
Search Engine - Organic Branded	-0.1%	-24.6%
Direct	32.9%	0.5%
Referred - Other	6.6%	-7.9%
Referred - Blog	232.3%	58.0%

A CMO can quickly evaluate different marketing strategies by studying the percentages in the *Trend* table. In this example, the CMO views *All traffic types* but to get a similar overview of all marketing campaigns switch to view *All campaigns*.

Visits Chart

Next select *Traffic, All*, and then select the *Visits* chart. This example, displays website traffic for the all four quarters in 2010.

All Traffic Types - Visits Chart



The *Visits* chart shows the *Value* (points accumulated), *Visits* (volume of traffic) and *Value per Visits* (efficiency) of visits for the quarters selected:

- The light blue line shows the number of visitors for the selected period (traffic volume).
- The orange line shows the amount of points accumulated during the visit (engagement value).
- The green bars show efficiency (value per visit)

You measure engagement value using engagement value points (EVP). Engagement value points are the total points accumulated by a visitor during a visit. Content Editors allocate points as a numeric value to goals on pages that could require a high level of visitor commitment on your website. For example, if a visitor uses a form to register or to sign up for a newsletter, this triggers a goal which has a specific point value.

In the example chart, both lines show an upward trend over time but the orange line is increasing at a slower rate than the light blue line and then starts dropping. This shows that the overall marketing effectiveness (efficiency of visits) for the website is decreasing.

The green bars measure efficiency (value per visit). By looking at the green bars, you can tell straight away that the general trend for marketing effectiveness is down. Efficiency is the most effective way to measure the marketing effectiveness of your website and is calculated using the following formula:

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

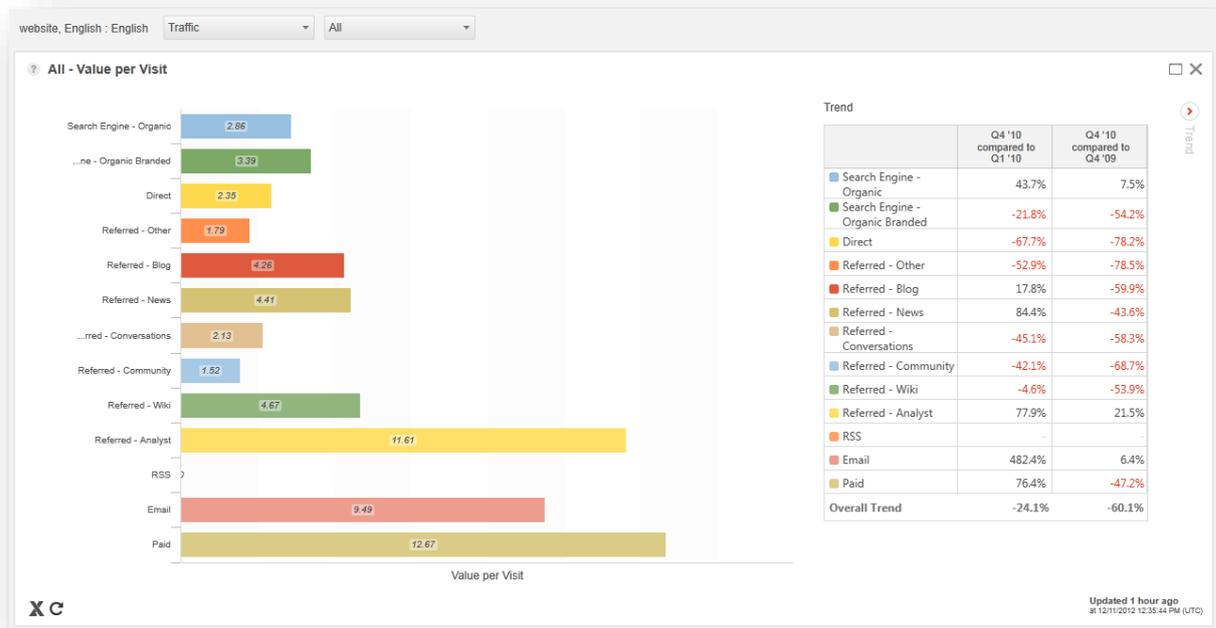
In this example, the *Visits* chart for *All Traffic Types* enables a marketer to see straight away, for the period selected, that the total marketing effectiveness of the website is decreasing. The number of visitors coming to the site is going up but the overall value being delivered from each visit is decreasing.

Value per Visits Chart

The *Value per Visits* chart enables you to assess the efficiency or marketing effectiveness of visits to your website. The bar chart and trend table enables CMOs to easily spot trends that could help them to identify where changes could be made to improve performance. For example, if a department is under performing.

In this example, *Paid Ads* create the most value per visit but *Search Engine - Organic* traffic is further down the list. A CMO would expect *Paid Ads* to be at the top but would also expect *Search Engine - Organic* traffic to be higher. This might lead a CMO to conclude that the SEO department could work more effectively to optimize organic traffic and that some campaigns should be examined more closely to assess whether they are providing value for money.

All Traffic Types - Value per Visits Chart



If you select the *Paid* traffic type for the first four quarters of 2010 in the *Value per Visit* bar chart, you can see in the *Trend* table that *Paid* traffic has decreased in efficiency by -47.2% compared with the previous year but is up by 76.4% if you compare the first and last quarters of the period selected.

For the same period, *Search Engine - Organic* traffic is up by 43.7% compared with the first quarter of 2010 and up by 7.5% compared with the same time the previous year. This would indicate to a CMO that the *Search Engine - Organic* channel is starting to perform better but that over the past year as a whole has not performed particularly well.

The overall trend for all traffic types is down compared with previous year by -60.1%. Therefore the *Visits*, *Value* and *Value per Visits* charts indicate that the current marketing strategy is not working.

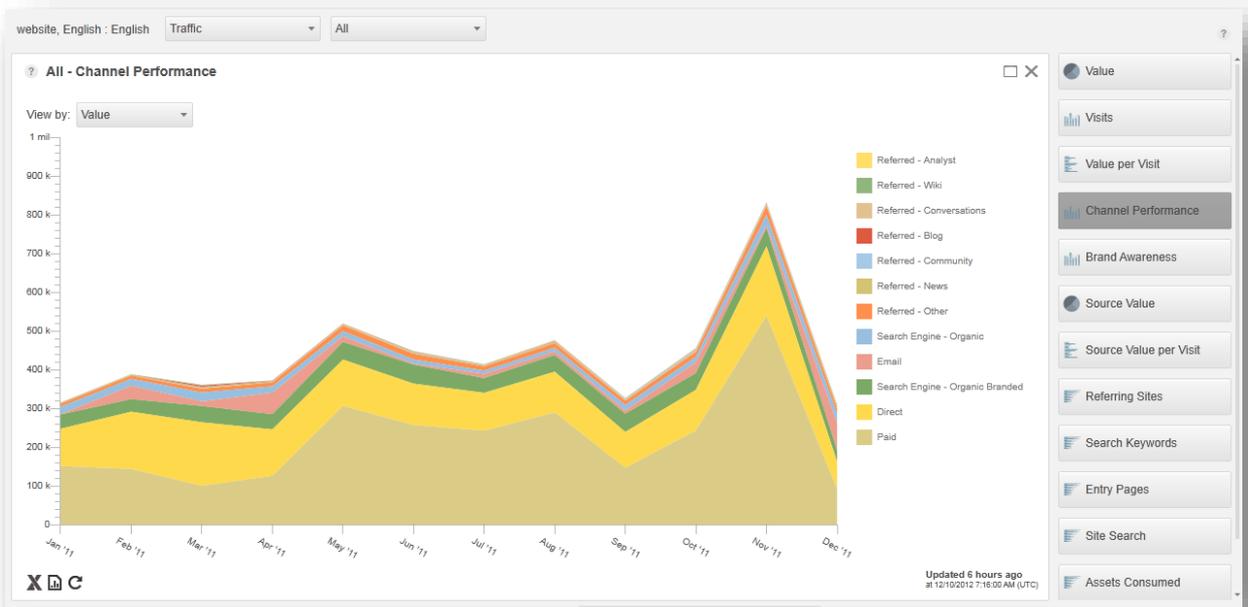
This may be because you are attracting the wrong kind of visitors to the website or maybe the website is becoming less relevant to its target audience over time. A CMO could use this information to investigate the cause of the problem. The next step might be to use the dashboard to assess the performance of an individual marketing channel or a specific campaign in detail. For example, examining the performance of *Search Engine - Organic* traffic in more detail might be a good place to start.

Channel Performance Chart

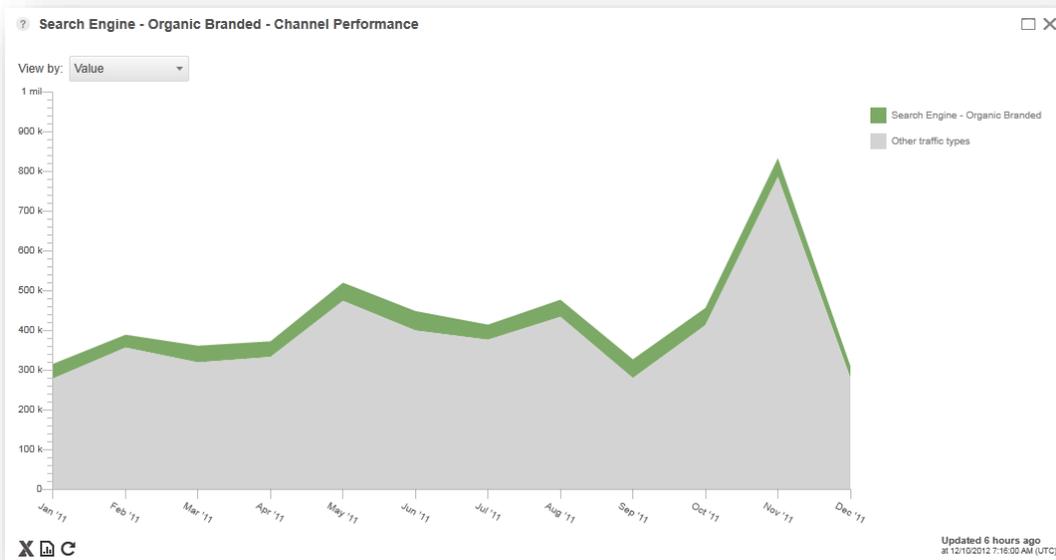
You can also use the *Channel Performance* chart to get a quick visual overview of the performance of your website traffic types or marketing channels. You can use the drop down to view channel data by *Value* or *Visits*.

In the following example, you can see the *Value* generated by channel traffic for the two years – 2011 and 2012. Each color represents a different channel or traffic type. In this example, you can see that the *Value* generated for all channels grew significantly in the last quarter of 2011 and then quickly

dropped away during the final month.



To assess the performance of a single channel compared with all the others, select a channel from the drop down, such as *Search Engine - Organic Branded*. This makes any overall trends even easier to see. You can also select a single channel by moving the mouse over one of the names in the key or by clicking on a color.



3.2.2 Assessing the Marketing Effectiveness of a Single Traffic Type

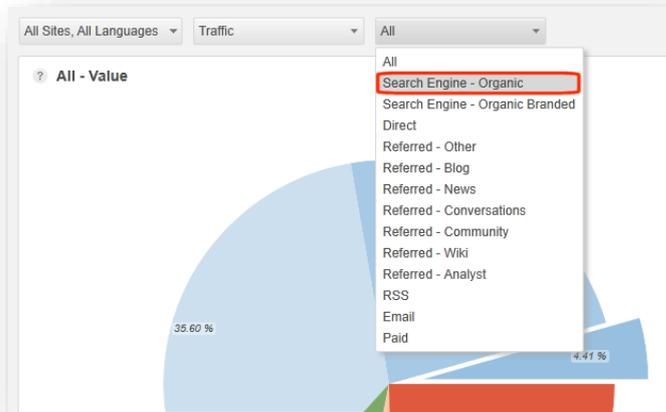
Examine one traffic type more closely to determine the effectiveness of a single marketing channel.

Scenario

A CMO now wants to learn more about the effectiveness of each marketing department. To do this drill down into the individual segments in the traffic type *Value* chart. The CMO is particularly interested in the *Search Engine – Organic* traffic segment in the chart.

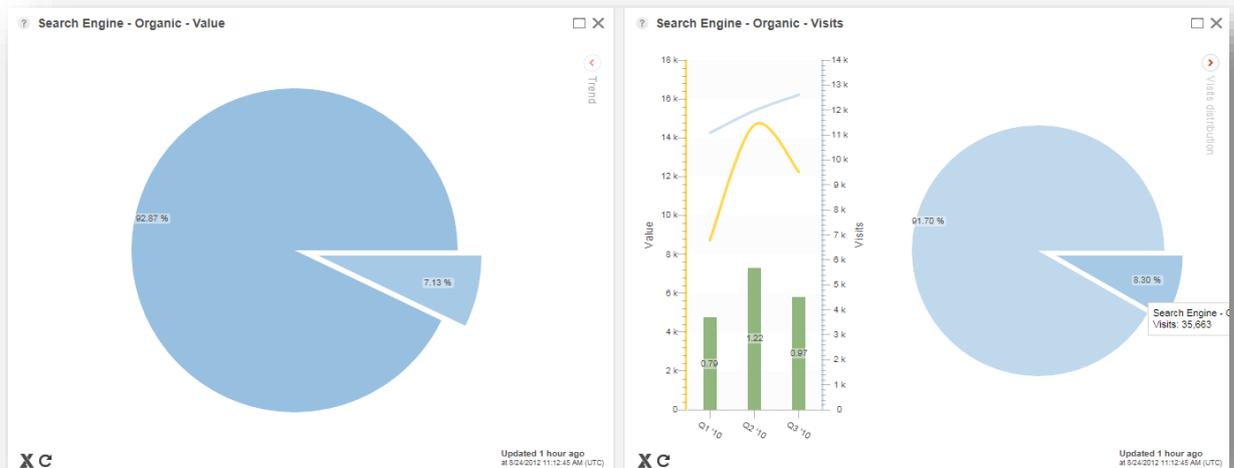
Search Engine - Organic - Value and Visits Chart

In the Executive Dashboard select *Traffic, Search Engine - Organic*.



View the *Value* and the *Visits* charts.

Search Engine - Organic Value and Visits Charts:



In *Resolution*, choose *Quarter* and then use the slider to select the first three quarters of 2010.

The *Search Engine - Organic Value* chart shows the percentage value of your chosen traffic type compared with all other traffic types available. In this example, you can see that *Search Engine - Organic* traffic contributes 7.13% of all points accumulated on the website for the selected period.

The Trend table shows that this is higher than for the same period a year ago and compared with the first quarter of this period:

Trend		
	Q3 '10 compared to Q1 '10	Q3 '10 compared to Q3 '09
Search Engine - Organic	40.5%	122.7%
Other traffic types	34.7%	82.9%
Overall Trend	35.1%	85.0%

The *Visits* chart shows that visits have increased for this traffic type but that the value and efficiency of visits have not grown at the same rate. This would indicate to a CMO that the SEO department needs to investigate this trend further.

Conclusions

The Executive Overview dashboard enables CMOs to see how much value each traffic type or marketing channel brings to their website. They can spot trends early and can see at a glance which channels need closer attention. CMOs can use dashboard data to calculate more accurately how to allocate marketing resources in the future.

The *All Traffic Types* charts for *Value*, *Visits* and *Value per Visits* enables CMOs to see straight away that the total marketing effectiveness of the website is decreasing. The number of visitors coming to the site is going up but the overall value delivered per visit is going down.

This would indicate that some marketing channels are not performing as well as they could. By drilling down into the *All traffic types*, *Value* chart CMOs can see which channels need closer attention.

Using the examples in this section, a CMO could conclude that the SEO department needs to take more action to improve the performance of certain marketing communication channels such as *Referred – Blog*, *Referred- Community* or *Search Engine – Organic* traffic types.

3.3 Charts for SEO Marketers

SEO marketers are responsible for increasing and optimizing traffic from search engines. *Search Engine - Organic* traffic refers to searches that do not use brand specific key words in their search terms. For example, a search for “best CMS” is *Search Engine - Organic*, a search for “Sitecore CMS” is *Search Engine - Branded*. SEOs can optimize keywords and landing pages to make organic searches more relevant and produce more value. Branded searches need less optimization. For more definitions, see Traffic Types in Chapter 1.

In the Executive Insight Dashboard SEO marketers can view charts that show which search keywords, entry pages and referring sites have generated the most value over a specific period of time. Visitors using Bing are different from visitors using Google or Yahoo. Searching for the same terms these demographic groups may exhibit significantly different behaviour. SEO marketers can optimize search engine keywords for different search engines and demographic groups with the aim of increasing the value and efficiency of visits to their website.

3.3.1 Identifying Ways to Improve the SEO Strategy on your Website

In the Executive Insight Dashboard an SEO can view charts that provide an overview of the top referring websites, the most popular search keywords and highest value entry pages. SEOs can also sort these charts to show future potential.

This is not easy to do with other analytics tools but in Engagement Analytics you can use the dashboard to see straight away where the problem lies and take immediate action. An SEO can then use standard SEO tools to increase the importance of certain keywords or to promote more relevant entry pages. The SEO can then monitor and refine these improvements over time.

Note

Compare the *Referring Sites*, *Search Keywords* and *Entry Pages* charts with each other. These charts are designed to work together and provide most value when used in this way.

Scenario

After reviewing the Executive Overview dashboard, the CMO has decided that the SEO department needs to improve its performance. In the Executive Insight Dashboard, there are several charts that SEO marketers can view to help them identify areas for improvement.

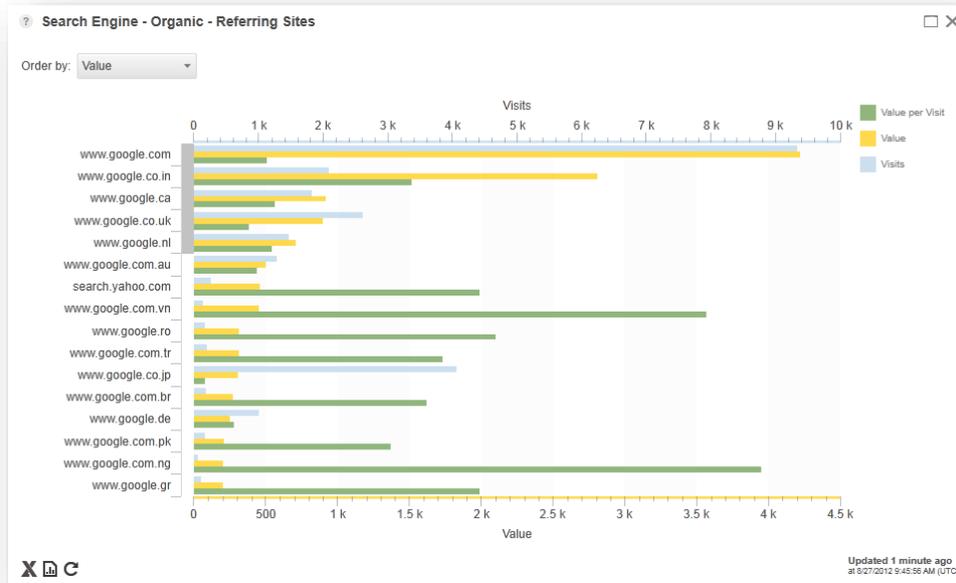
The SEO marketer wants to view charts in the dashboard that will enable him to identify where changes could be made to improve the performance of *Search Engine - Organic* traffic.

Referring Sites Chart

Knowing which sites or search engines refer the highest value visitors to your website enable SEOs to segment visits into different traffic types or marketing channels. This makes it easier to analyze the effectiveness of each marketing channel and to make the right decisions to improve overall SEO strategies.

In the Executive Insight Dashboard, in the dashboard data selection drop-down, select *Traffic* and then the *Organic Branded* traffic type. Select the *Referring Sites* chart.

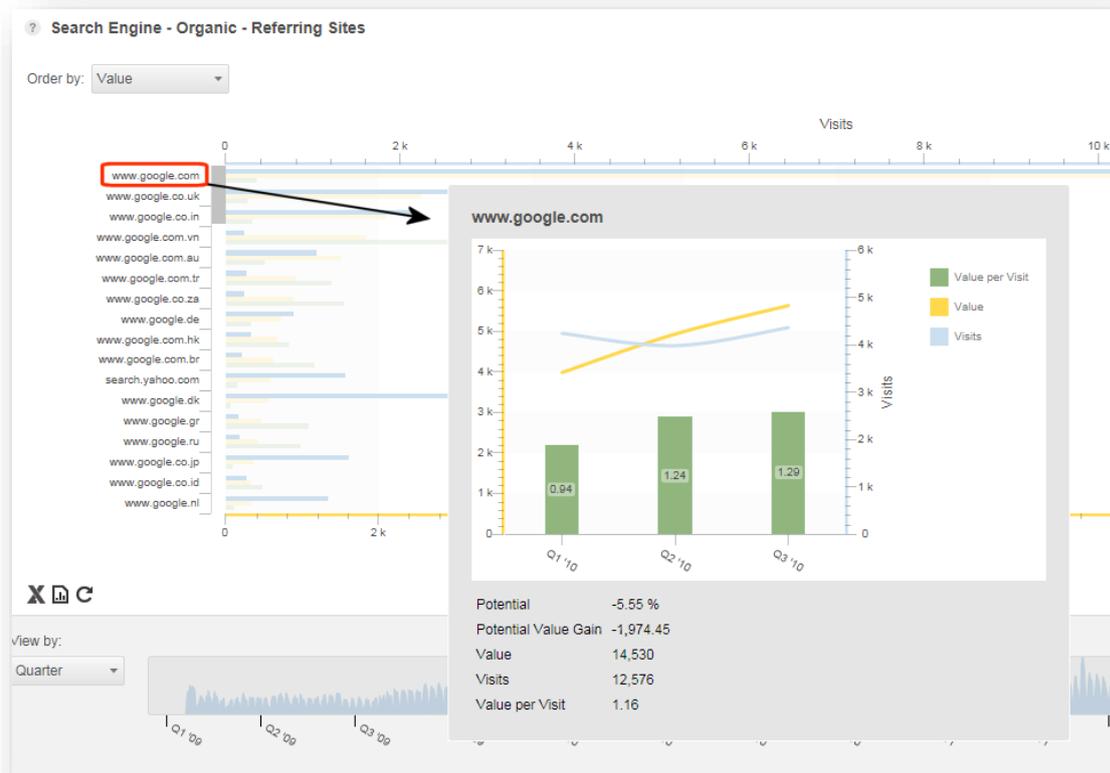
Referring Sites Chart – Order by Value



In this example the *Referring Sites* chart displays the most popular sites used to conduct organic searches. The list has *google.com* at the top followed by several other Google country sites and other search engines such as *Yahoo*. It shows that visitors are using different types of search engines to find the website and that the visits generating the most value are coming from *google.com*.

Move the mouse over the orange bar representing *google.com* to see a more detailed breakdown of the value per visits and potential generated from these visits.

Referring Sites pop-up for google.com:

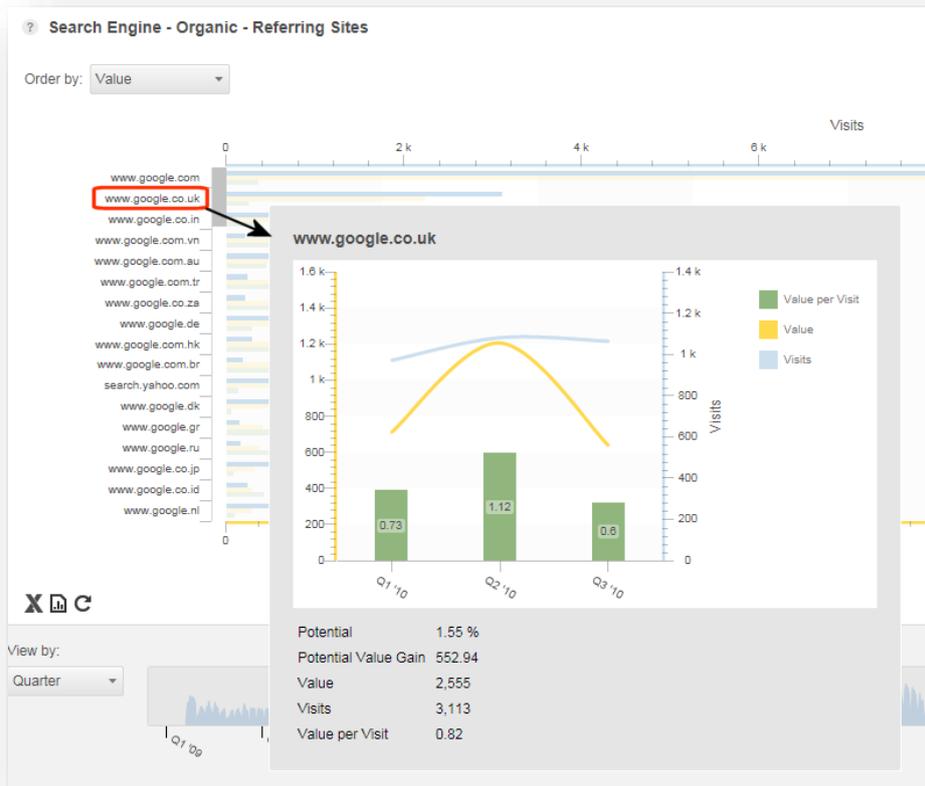


The pop-up for *www.google.com* shows *Value* (Engagement Value), *Value per Visit* (Efficiency) and *Visits* (traffic). Below the chart you can also see *Potential* and *Potential Value Gain*. Potential enables you to see how much value you could gain in the future if you managed to increase the efficiency to the same level as the site average. From this chart an SEO might decide that the current strategies, for example keyword optimization are working well for *google.com* but not for other search engines such as *Google.co.uk* and *Yahoo*.

For more information on how *Potential* and *Potential Value Gain* are calculated, see [Potential](#).

Now move the mouse over *www.google.co.uk*. The pop-up chart shows that *www.google.co.uk* is not referring as many visitors to the website as *google.com*.

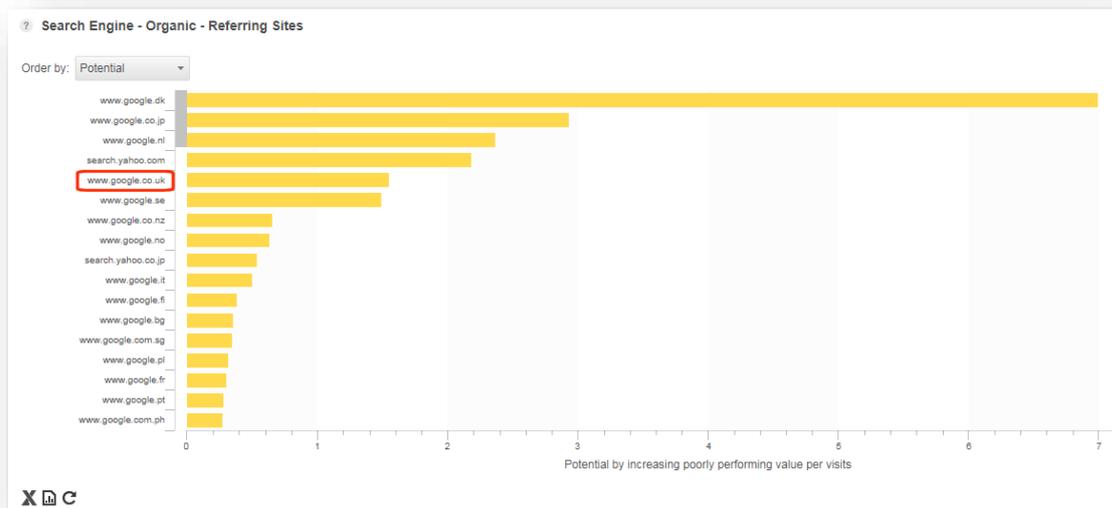
Referring Sites pop-up for *www.google.co.uk*:



In the third quarter visits are still high but value is going down. *Google.co.uk* clearly has the potential to perform better.

If you order *Referring Sites* by *Potential* you can also see which search engines show the most future potential.

Referring sites that show the most potential:



Google.co.uk appears fifth on the list after *www.yahoo.com*.

An SEO can see that by optimizing search keywords to make them more relevant to *www.google.co.uk* and *www.google.se* it is possible to increase the volume and quality of traffic referred from these sites.

After reviewing all this information the SEO decides to take the appropriate steps to improve SEO strategies in relation to *google.se* and *www.google.co.uk*. The next step is to examine the keywords used on the website and which entry pages are most popular.

Note

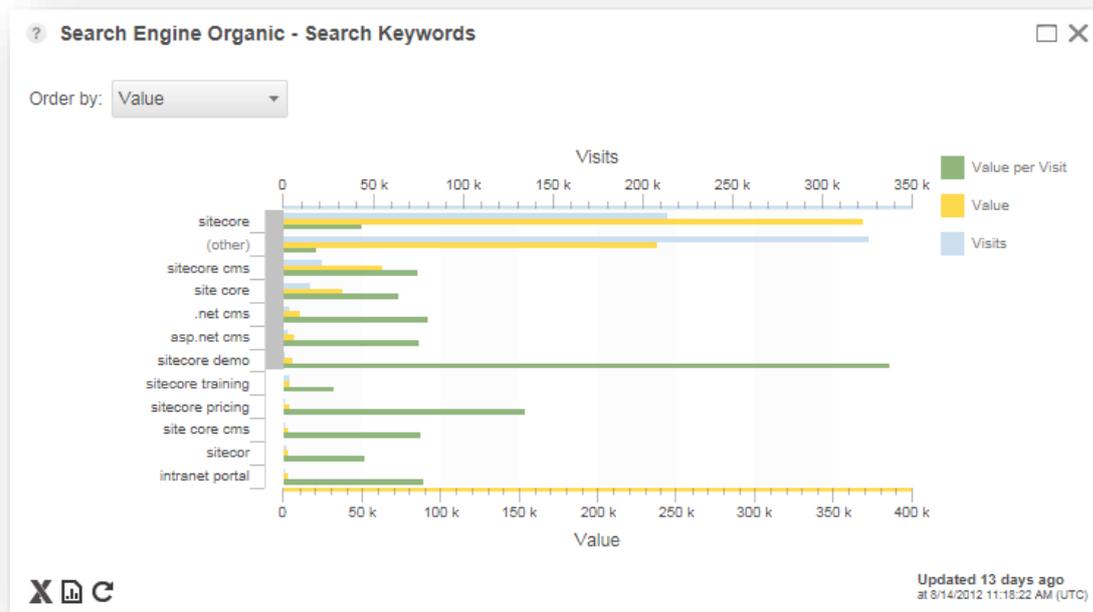
If a referring site has not been classified it remains in the *Referred - Other* group. Some referring sites can be classified automatically while others must be manually classified using the dashboard. For more information about how to classify referring sites to traffic types, see *Classifying Traffic Types*.

Search Keywords Chart

Select the Search Keywords chart for Search Engine - Organic.

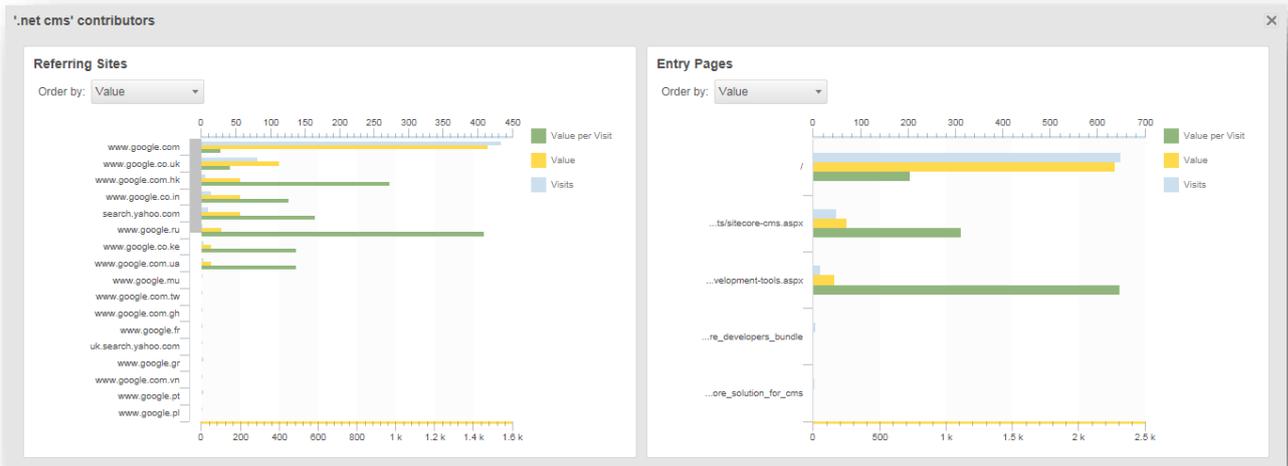
The *Search Keywords* chart shows which keywords visitors chose to enter into a search engine when they were looking for your website and which keywords generated the most value on the site. You can sort this data by *Visits*, *Value per Visit (Efficiency)* and *Potential*.

Search Keywords Chart - Search Engine Organic:



In this example, *sitecore* was the most popular search keyword and generated the most value on the website. The search phrase *sitecore demo* generated the most relevant visits (green bar), followed by *sitecore pricing* which generated a high level of efficiency with a small number of visits. An SEO could click on the bars next to one of the keywords, such as *.net cms* to see which was the most popular search engine for visitors using this keyword and on which page they entered the website.

Referring Sites and Entry pages for the keyword .net cms:

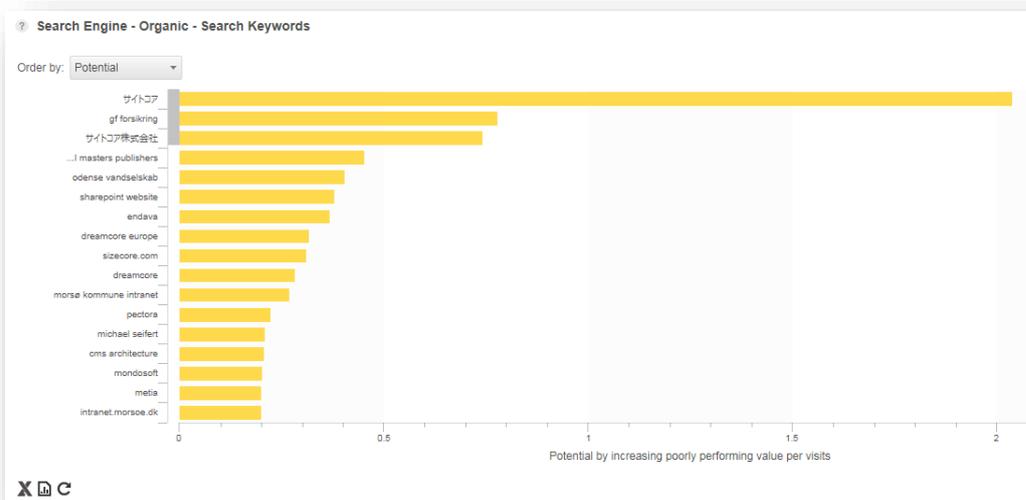


The *Referring Sites* chart shows that for the search term *.net cms*, *google.com* was the most popular search engine and the *Entry Pages* chart shows that most visitors entered the site on the home page.

This might indicate to an SEO that the current search keywords work well with *google.com* but are not optimized for use with search engines such as *Yahoo* or *other Google* country websites.

An SEO might then also decide that the home page should not be the default landing page for visitors that use this search term. One improvement based on this information might be to create a new landing page tailored to the needs of visitors interested in the benefits of a *.net cms*.

The *Potential* chart for Search Engine – Organic Search Keywords:

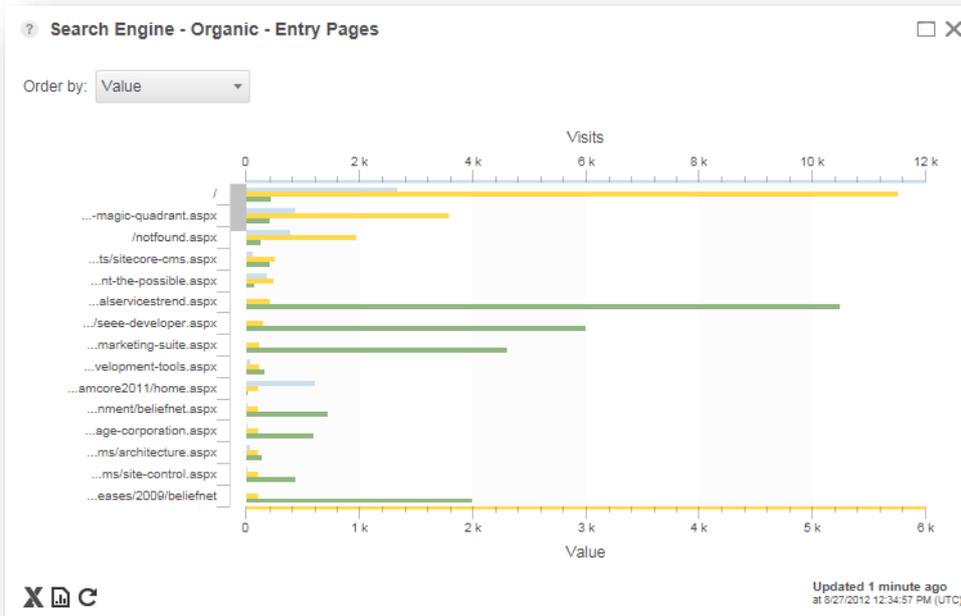


If you order the same data by potential you can see that the keyword with the most potential for organic searches is a Japanese search term. This search term is generating quite a high number of visits but is not leading to high levels of commitment from visitors to the website. An SEO could take steps to address this situation. For example, create more landing pages in Japanese and add more Japanese keywords relevant to visitors looking for these pages.

Entry Pages Chart

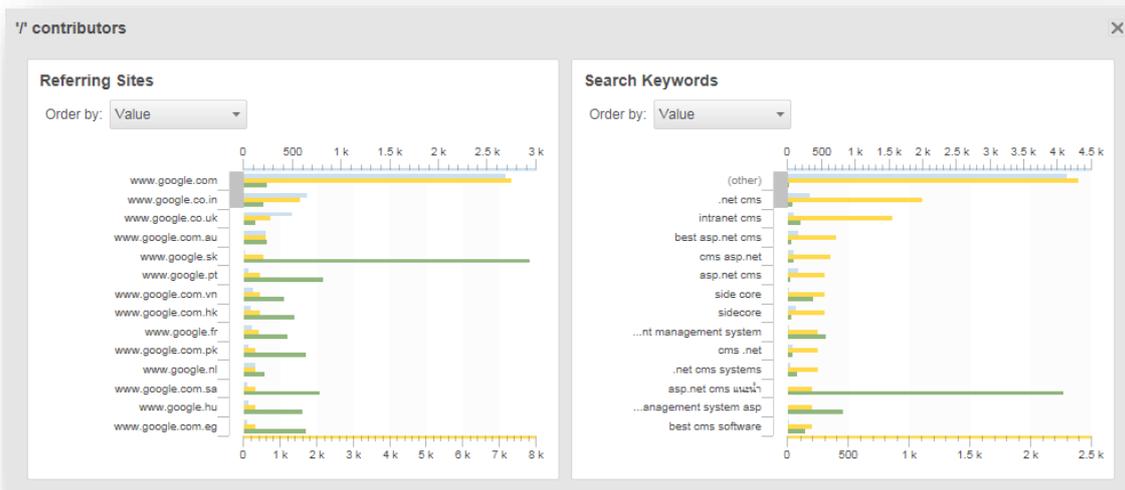
Engagement Analytics can show you which entry pages are the most popular and which pages lead to the highest value visits on your website. This information could help you to increase the effectiveness of all the pages on your website. Other analytics systems cannot do this.

The most popular entry pages for Search Engine – Organic traffic:



The home page of the website is the most popular entry page. Click on the bars representing the home page to view the *Referring Sites* and *Search Keywords* charts. The *Referring Sites* chart shows which websites referred the most traffic to the home page.

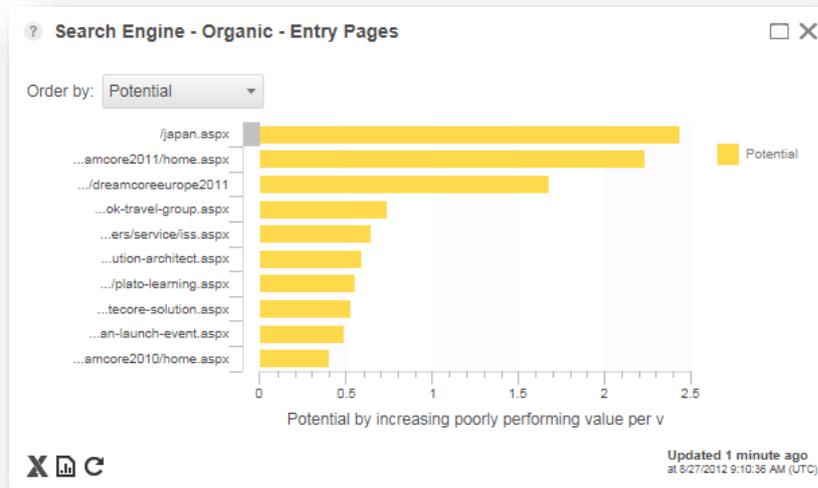
Top referring sites and search keywords for the home page:



The search engine *www.google.com* is the biggest referrer, generating the most value but not the most value per visit. You can also see which keywords visitors used when searching for the site using *www.google.com*.

Sort *Entry Pages* by *Potential* to know which landing pages on your site could lead to high value visits in the future but which are currently under performing. This type of information could affect an SEO’s keyword strategy.

Entry pages that show the most potential:



Click on one of the bars in the *Potential* chart to see a breakdown of referring sites and search keywords potential for the selected entry page.

Detailed breakdown of the potential for the /japan.aspx entry page:



The potential chart shows that if an SEO marketer optimizes search keywords more effectively for the Japanese language then in the future more Japanese visitors might be referred from *Yahoo* and other *Google* websites.

Conclusions

By using the Executive Insight Dashboard, the CMO found that the SEO department was under performing.

When made aware of this problem, the SEO marketer examined this performance more closely using a selection of charts in the dashboard to identify possible areas for improvement.

The *Referring Sites* charts, showed which search engines produced the most relevant search results and the highest value visitors. The *Potential* chart indicated which search engines could be targeted in the future.

The *Search Keywords* charts enabled the SEO to find out which keywords were the most effective with different referring sites and the *Potential* chart indicated which keywords should gain more prominence.

The *Entry Pages* charts showed which pages had the highest number of visits but also which entry pages led to the most engagement and commitment on the website.

After identifying these three areas for improvement the SEO marketer could use standard tools to optimize keywords and to create new entry pages with the aim of attracting more high value visitors to the website. The Executive Insight Dashboard enables an SEO marketer to monitor and refine these strategies over time ultimately leading to a higher level of marketing effectiveness on the website.

3.4 Charts for Marketing Campaign Managers

The Executive Insight Dashboard enables CMOs and campaign managers to get an overview of their marketing campaigns. Engagement Analytics campaign dashboards and charts not only provide information about which campaigns generate the most visitors but also which campaigns generate the highest value and bring the most relevant visitors to your website.

CMOs can use this information to identify underperforming or failing campaigns and to inform their decisions on how to allocate valuable marketing funds and resources.

Campaign marketers responsible for specific campaigns can use the dashboard to drill down into charts to examine the performance of individual campaigns so they can, if necessary adjust their campaign strategies.

To drill down into a campaign, right click the appropriate segment in the campaign chart.

3.4.1 Assessing the Performance of your Marketing Campaigns

To get an overview of campaign performance, in the data selection drop-down, select *Campaign* and then *All*.

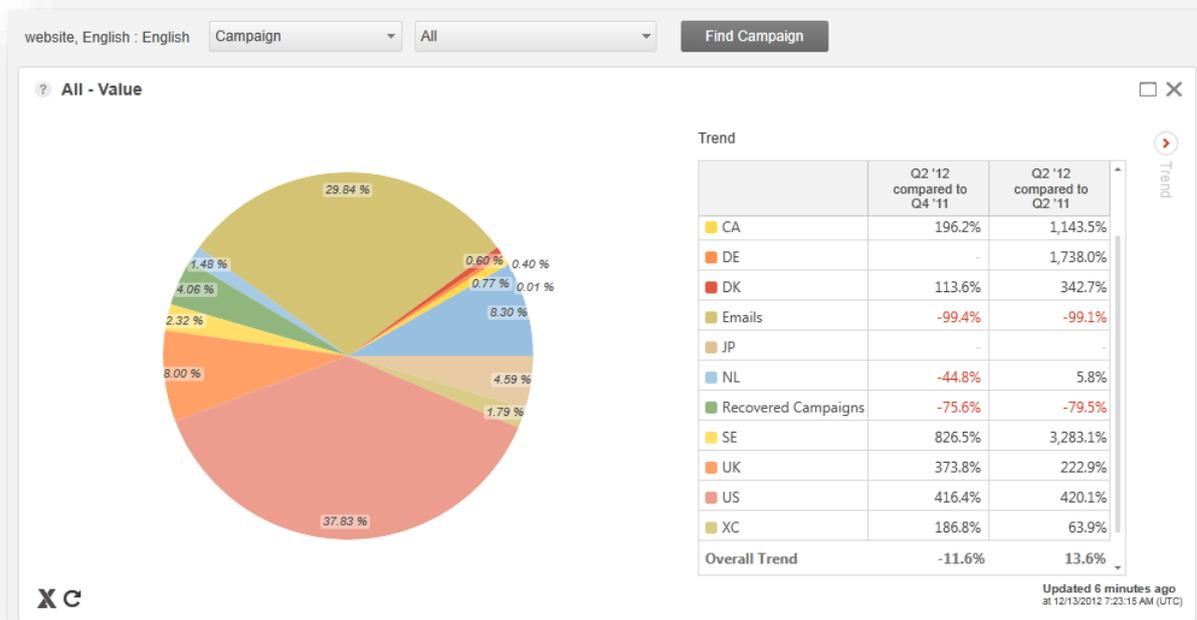
Scenario

A CMO wants to get a high level overview of which campaigns are the most effective and provide the best overall return on investment.

All Campaigns Dashboard

In the Executive Insight Dashboard, select *All Campaigns* and then select the *Value* chart for the last quarter of 2011 and the first two quarters of 2012.

Pie chart showing the performance of all campaign categories:



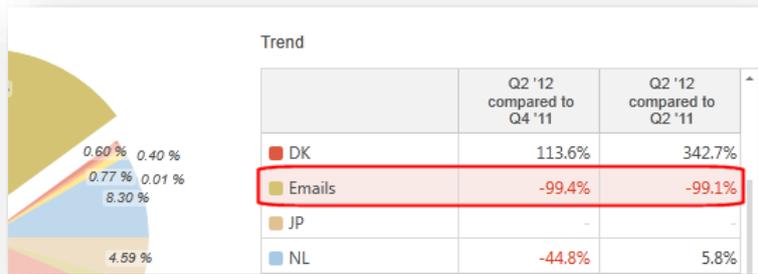
The *Value* chart shows all campaign categories and a percentage value for each segment which represents the engagement value that a specific campaign has generated on the website for the period selected. A CMO can see straight away which categories generate the most engagement value and can assess which campaign categories need further attention.

For example, select the *Emails* campaign category. During the period selected, email campaigns contribute 29.84% of all the value generated on the website. However, the trend table shows that this amount has actually dropped in real terms.

Comparing the last quarter selected with the same quarter a year ago the trend table shows that the *Emails* category has dropped in value by -99.4% and by -99.1% if you compare the first and last quarters of the selected period.

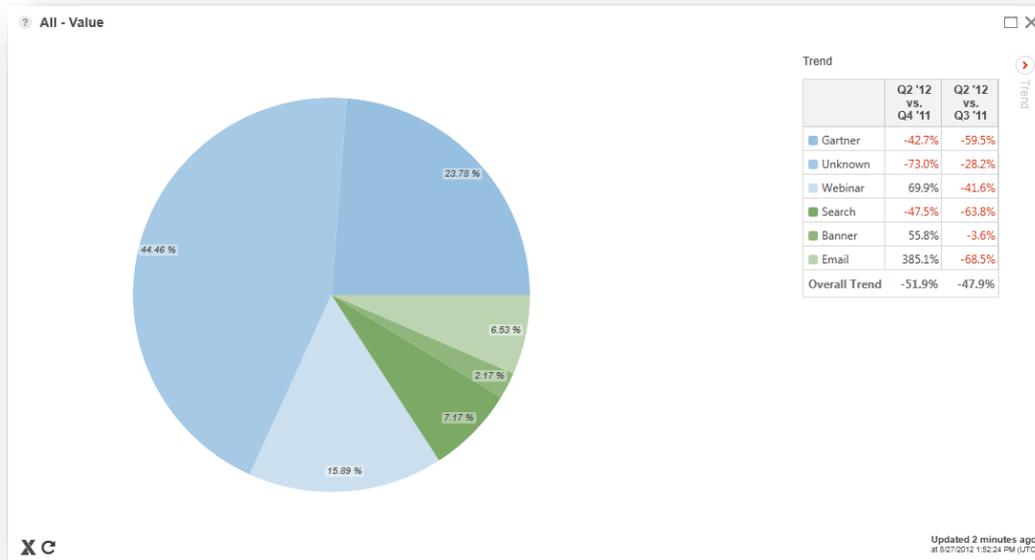
This might indicate to a CMO that the marketer responsible for this category should examine their email campaigns more closely to find the cause of this decrease.

All campaigns trend table – Search campaigns:



CMOs or campaign marketers can use the trend table or drill down into specific campaign categories to discover more trends (right click the chart to drill down). For example, view all campaigns for *Gartner* from *Sitecore.net*.

Search campaigns – Gartner category:

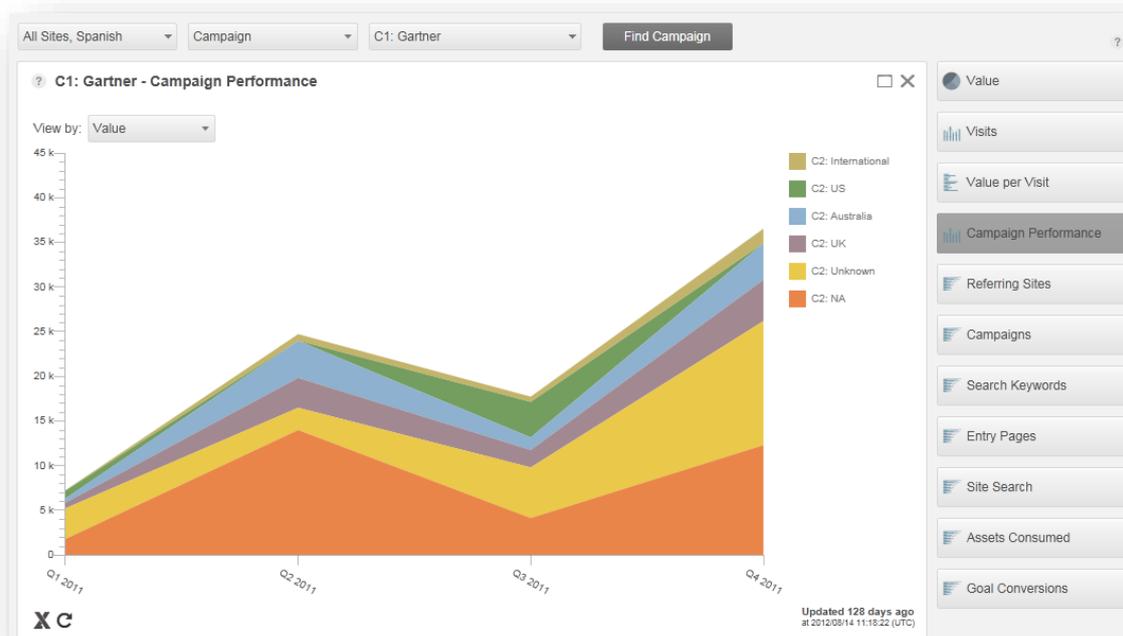


Using the *All - Value* chart a CMO can quickly gain an overview of how *Gartner* campaigns are performing and can identify any significant trends.

Campaign Performance Chart

The *Campaign Performance, Value* chart gives CMOs a visual overview of how campaigns have performed over time enabling them to quickly identify any significant patterns or trends.

For example, C1: Gartner - Campaign Performance chart:



3.4.2 Assessing the Performance of an Individual Marketing Campaign

Marketing campaign managers need access to the latest data in dashboards and charts so they can identify successful campaigns, improve underperforming campaigns and end failing ones. Engagement Analytics enables campaign marketers to measure the marketing effectiveness of their campaigns and not just the quantity of visits.

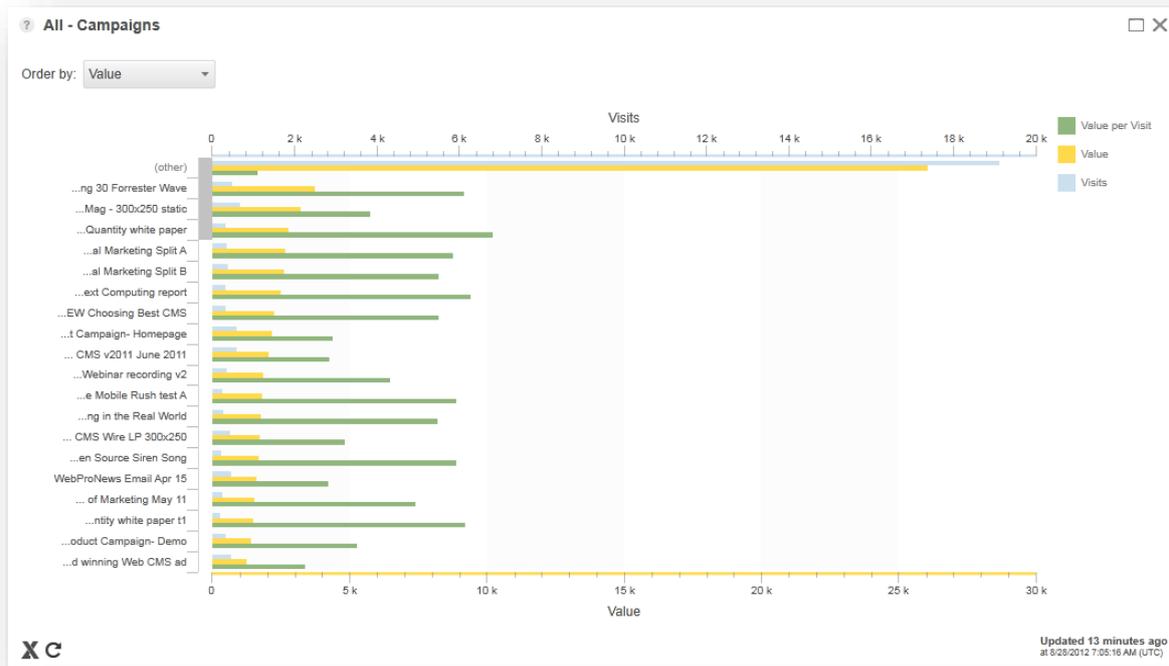
Scenario

A campaign marketer wants to drill down into several different marketing campaign categories to get more detailed information on specific campaigns.

Campaigns Chart

In the Executive Insight Dashboard, select *All campaigns*, *Campaigns* chart. Select all campaigns for the last three quarters of 2011.

All campaigns ordered by Value:



The *Campaigns* chart lists all campaigns by value. The name of each campaign appears on the left hand side of the bar chart. To see the full name of the campaign, move the mouse over the name. Three colored bars represent each campaign:

- Light blue = Visits (total visits for the campaign)
- Orange = Value (total accumulation of points during the visit)
- Green = Value per visit (value/visits)

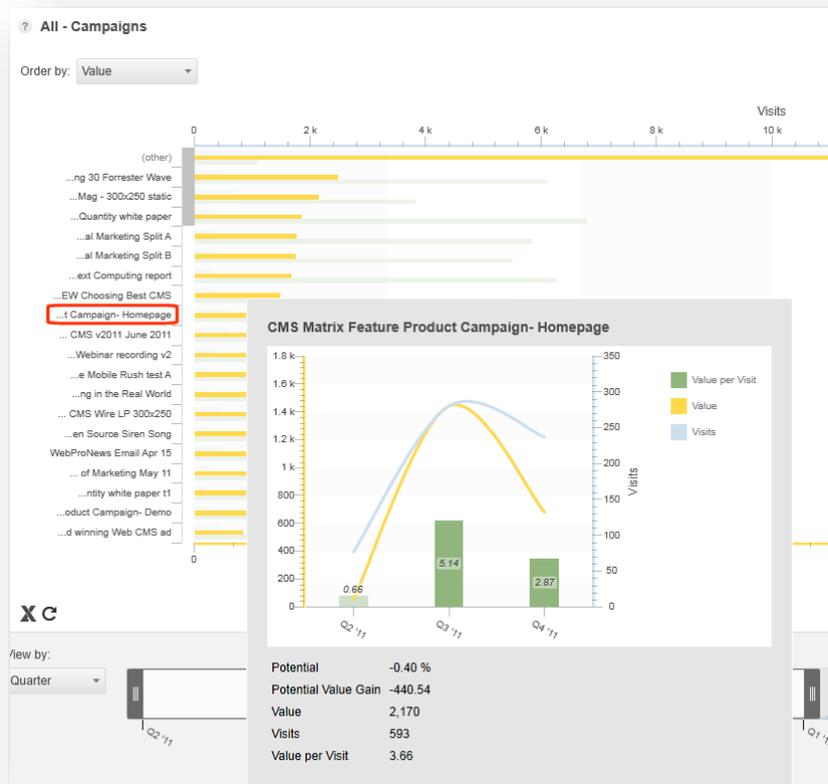
You can use the *Order by* drop-down to sort campaigns by each of these three values. This enables campaign marketers to see at a glance which campaigns have generated the most value, most visits, efficiency and potential on their website for the selected period.

Pop-up Chart for a Single Campaign

To see a more detailed pop-up chart for an individual campaign, move the mouse over one of the three colored bars in the campaign chart. Click on the bars to see the *Entry Pages* chart for the selected campaign.

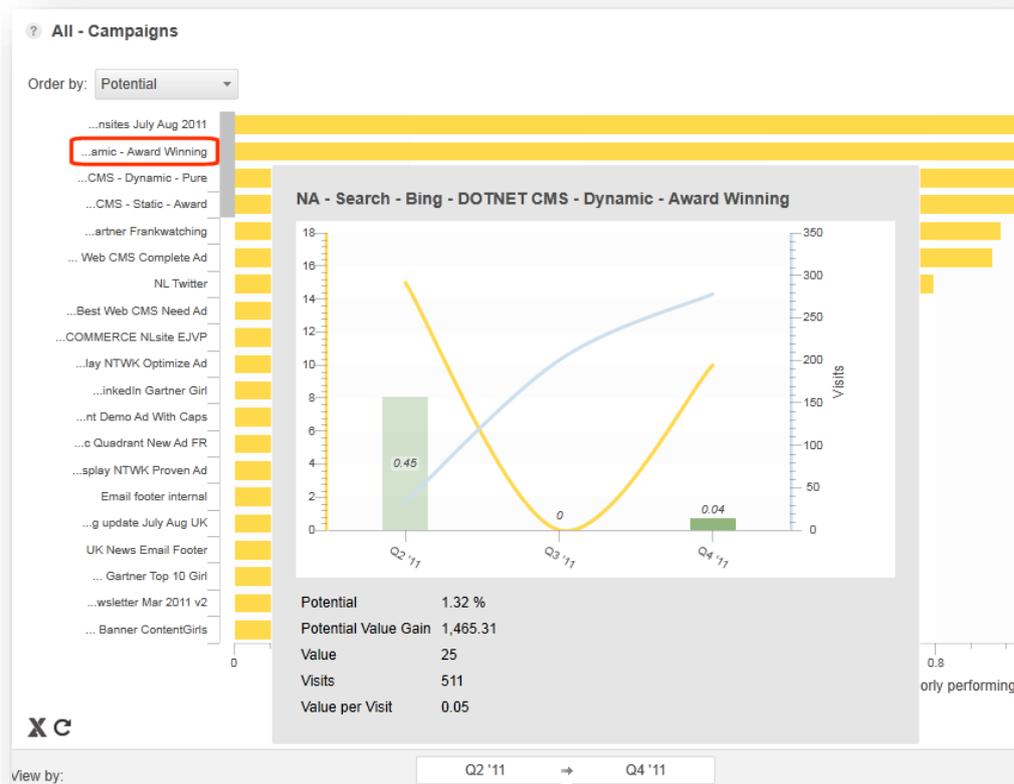
Examples

CMS Matrix campaign Value chart:



The *CMS Matrix Feature Product Campaign - Homepage* contains two quarters of complete data and one quarter of partial data for the period selected. The pop-up chart shows that value, visits and value per visit for this campaign peaked in Q3 and then dropped in Q4. The number of visits remained high into Q4 but the value generated dropped substantially. This indicates that the campaign is no longer effective. Either this campaign was only required to run for a short period or its overall effectiveness has dropped. A marketer can see this drop in performance at a glance and could immediately take steps to increase the value of visits to this campaign.

Bing campaign Potential chart:



This campaign started well in the first quarter but displays a big drop in value and efficiency in the second and third quarters. However, this chart shows that *Bing* has quite a lot of future potential. Despite increasing numbers of visitors, this campaign is not as effective as it could be. Some steps the campaign manager for *Bing* could take could be to increase the overall budget for this campaign and develop new and more effective landing pages. It would then be possible to monitor and measure the effectiveness of these changes in the dashboard.

Conclusions

CMOs can select all campaigns to get a quick overview and then marketing staff can use the campaigns pop-up chart or drill down to see how individual campaigns are performing.

The example data in this section shows which campaigns are currently attracting the most visitors but also that some of these campaigns are generating less and less value over time. This means that you may not be attracting the right visitors to your website. You may need to adjust some campaigns to ensure that the visitors coming to your website show higher levels of commitment. For example, this might mean creating new campaigns or more effective landing pages.

You can also see which campaigns show the most future potential. This might indicate to CMOs which campaigns require the most investment and re-allocation of resources to maximize their full potential.

If a CMO or marketer can quickly identify trends like this it may be possible to make improvements or plan alternative marketing strategies before too much marketing budget has been spent on the wrong campaigns.

Chapter 4

Additional Dashboard Functionality

This chapter includes the following sections:

- Reloading Dashboard Data
- Exporting Dashboards to Microsoft Excel
- Opening a Visit Report from the Dashboard
- Viewing Campaign Charts from the Marketing CenterViewing Campaign Charts from the
- Classifying Traffic Types
- Assigning Brand Keywords

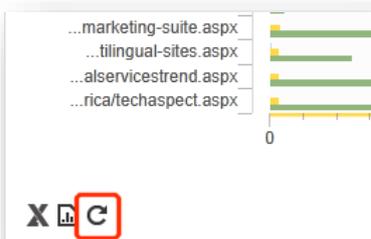
4.1 Reloading Dashboard Data

All data in the Executive Insight Dashboard is updated automatically every 24 hours. Data comes from several SQL Server cache tables that are used to improve performance and speed up processing time.

To refresh the data in a dashboard manually, click *Reload data*. This means that the server will bypass the file cache to get the very latest data available including any changes made since the last automatic update.

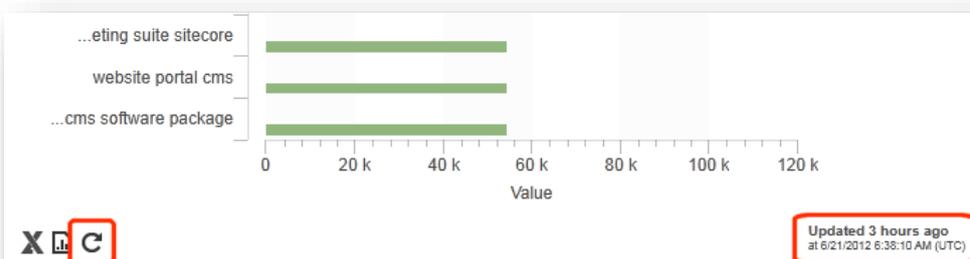
This can be useful, for example if you re-classify a traffic type and want to see the change straight away. Click *Reload data* and the change appears immediately in the dashboard.

The Reload data button:



The *Reload data* button appears on all dashboards and charts.

When you refresh a dashboard in this way the update applies from the very moment you click the *Reload data* button. A timestamp below each chart displays the date and time of the last update.



However, when you click the *Reload data* button, not all data in the Executive Insight Dashboard is refreshed at the same time. Some charts share data, so when you reload one, all other related charts are also updated.

Traffic Charts

The following traffic charts share the same data, so if you reload one chart, all the others update at the same time:

- Value
- Visits
- Value per Visits
- Brand Awareness
- Source Value
- Source Value per Visit

Campaign Charts

The following campaign charts share the same data, so if you reload one chart, all the others update at the same time:

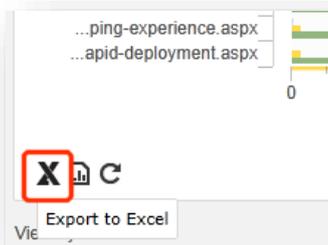
- Value
- Visits
- Value per Visit

All other charts in the dashboard are individual and do not relate to each other. Therefore, if you click the *Reload data* button you only update the chart that you have open.

4.2 Exporting Dashboards to Microsoft Excel

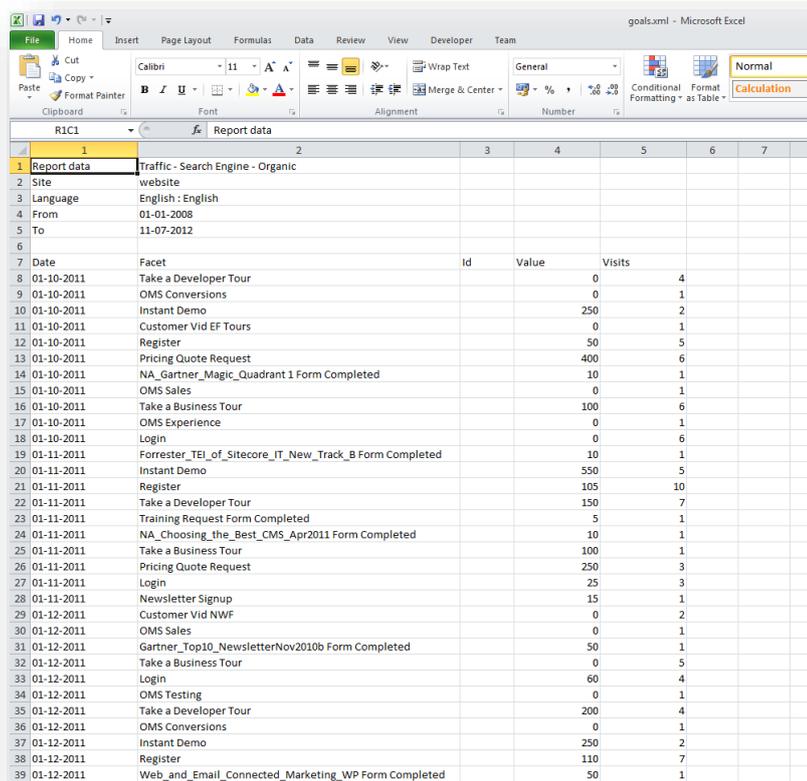
To save a dashboard as an Excel spreadsheet:

1. Click the Excel icon in the bottom left of any dashboard. Every chart and graph in the dashboard has this option.



2. When you click **Export to Excel**, this opens a **Save As** dialog box. Choose a name and a location to save the Excel spreadsheet.
3. In the **Save As** dialog box, click **Save**. The selected chart is saved as a .xml file.
4. Open the XML file using Microsoft Excel.

Excel spreadsheet showing goal conversions for the Search Engine - Organic traffic type:



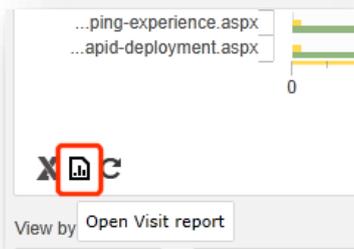
Date	Facet	Id	Value	Visits
01-10-2011	Take a Developer Tour		0	4
01-10-2011	OMS Conversions		0	1
01-10-2011	Instant Demo		250	2
01-10-2011	Customer Vid EF Tours		0	1
01-10-2011	Register		50	5
01-10-2011	Pricing Quote Request		400	6
01-10-2011	NA_Gartner_Magic_Quadrant 1 Form Completed		10	1
01-10-2011	OMS Sales		0	1
01-10-2011	Take a Business Tour		100	6
01-10-2011	OMS Experience		0	1
01-10-2011	Login		0	6
01-11-2011	Forrester_TEI_of_Sitecore_IT_New_Track_B Form Completed		10	1
01-11-2011	Instant Demo		550	5
01-11-2011	Register		105	10
01-11-2011	Take a Developer Tour		150	7
01-11-2011	Training Request Form Completed		5	1
01-11-2011	NA_Choosing_the_Best_CMS_Apr2011 Form Completed		10	1
01-11-2011	Take a Business Tour		100	1
01-11-2011	Pricing Quote Request		250	3
01-11-2011	Login		25	3
01-11-2011	Newsletter Signup		15	1
01-12-2011	Customer Vid NWF		0	2
01-12-2011	OMS Sales		0	1
01-12-2011	Gartner_Top10_NewsletterNov2010b Form Completed		50	1
01-12-2011	Take a Business Tour		0	5
01-12-2011	Login		60	4
01-12-2011	OMS Testing		0	1
01-12-2011	Take a Developer Tour		200	4
01-12-2011	OMS Conversions		0	1
01-12-2011	Instant Demo		250	2
01-12-2011	Register		110	7
01-12-2011	Web_and_Email_Connected_Marketing_WP Form Completed		50	1

4.3 Opening a Visit Report from the Dashboard

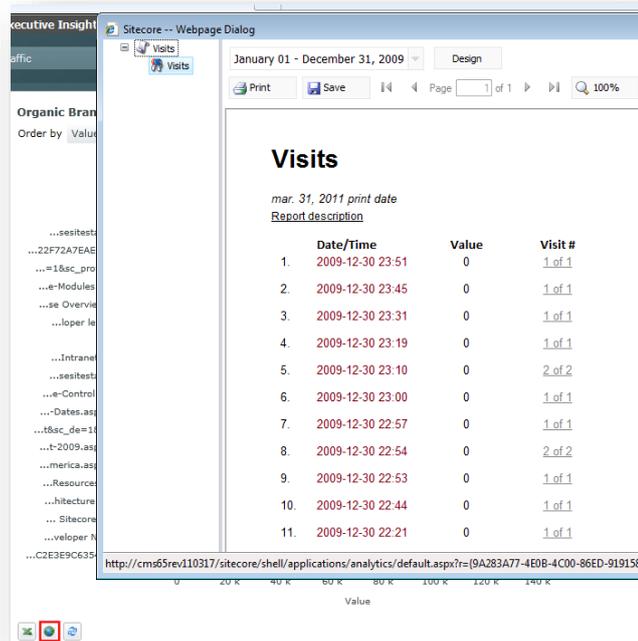
You can open the Engagement Analytics, *Visits* report from the Executive Insight Dashboard. The dashboard gives you a high level overview of your campaigns and your marketing channels but *Engagement Analytics* reports give you more detailed information. For example, you can drill down into the *Visit Detail* report to get session trail information for every visitor and every session on the website.

To open the *Visits* report:

1. Click on the **Open Visit report** globe icon in the bottom left of any traffic dashboard.



The Stimulsoft Visits report opens in a new window.



The screenshot shows a window titled "Sitecore -- Webpage Dialog" with a "Visits" report. The report is for the period "January 01 - December 31, 2009". It displays a table with the following data:

Date/Time	Value	Visit #
2009-12-30 23:51	0	1 of 1
2009-12-30 23:45	0	1 of 1
2009-12-30 23:31	0	1 of 1
2009-12-30 23:19	0	1 of 1
2009-12-30 23:10	0	2 of 2
2009-12-30 23:00	0	1 of 1
2009-12-30 22:57	0	1 of 1
2009-12-30 22:54	0	2 of 2
2009-12-30 22:53	0	1 of 1
2009-12-30 22:44	0	1 of 1
2009-12-30 22:21	0	1 of 1

2. Click any link in the **Visits** report to drill down for more detailed information. In this example, click the timestamp to view the **Visit Detail** report for a single visit.

Note

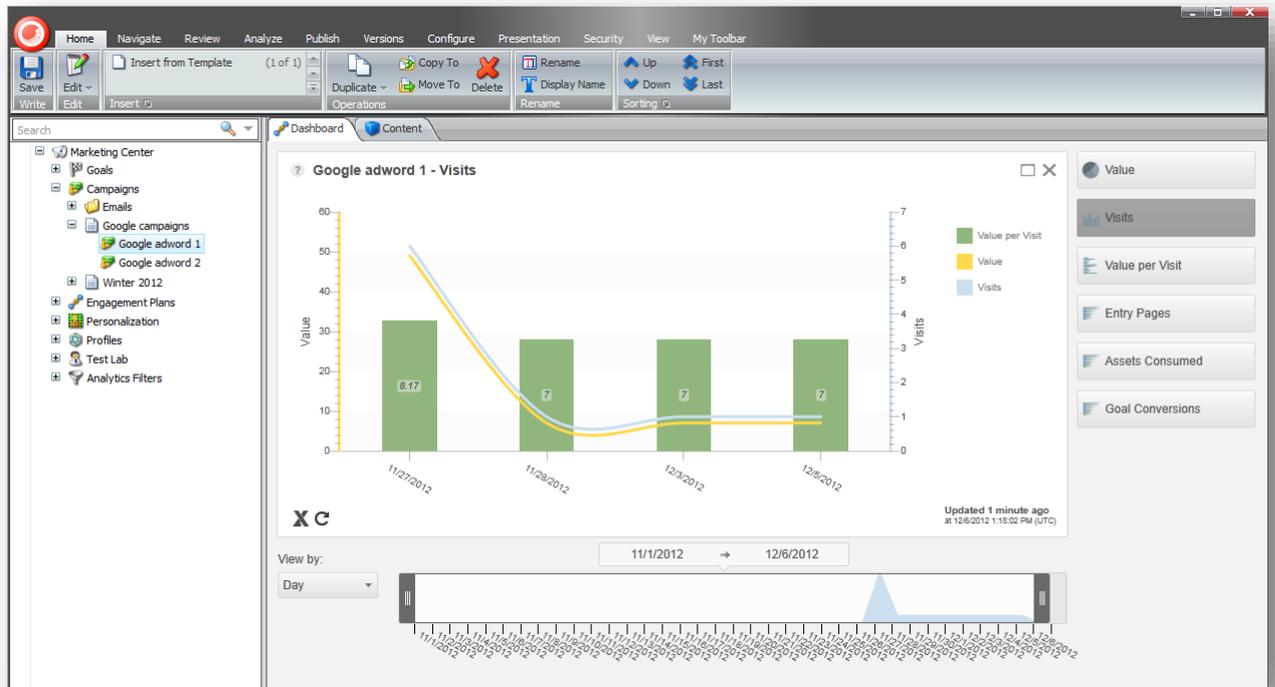
The Executive Insight Dashboard only displays links to Stimulsoft reports from the Traffic Type dashboard.

4.4 Viewing Campaign Charts from the Marketing Center

In the Marketing Center you can view a single campaign or campaign category and see the related dashboard chart for this campaign embedded in a *Dashboard* tab.

To see a dashboard for a single campaign category:

In the Marketing Center, select a campaign, or campaign category and in the right hand panel, a *Dashboard* tab appears displaying data from that campaign.



The embedded dashboard has less functionality than the full dashboard. For example, you cannot view any traffic types or channels. However, you can use the timeline slider and *View by* drop down to select a specific time period.

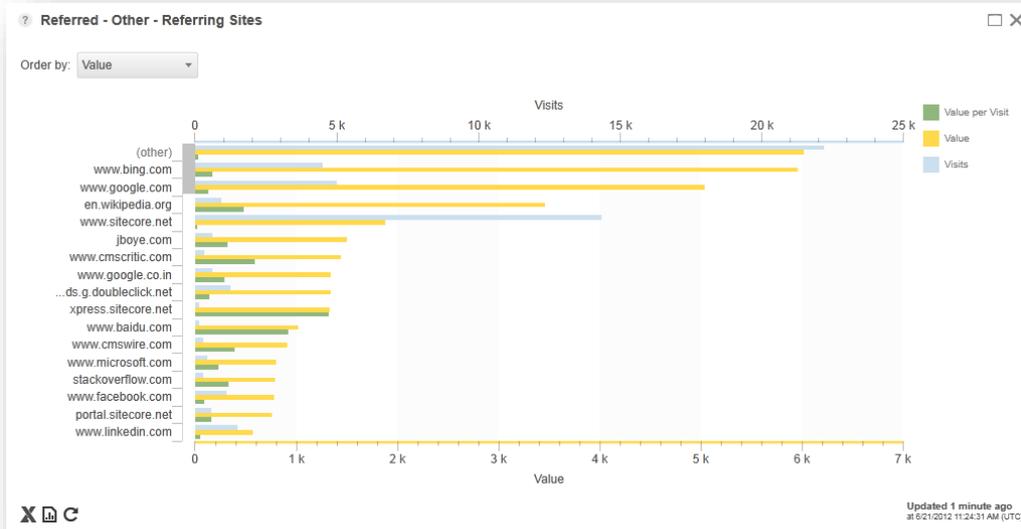
For each campaign you can view the following charts:

- Value
- Visits
- Value per Visit
- Entry Pages
- Assets Consumed
- Goal Conversions

4.5 Classifying Traffic Types

The Executive Insight Dashboard segments visits into traffic types so that it is easier to assess the performance of your various marketing channels.

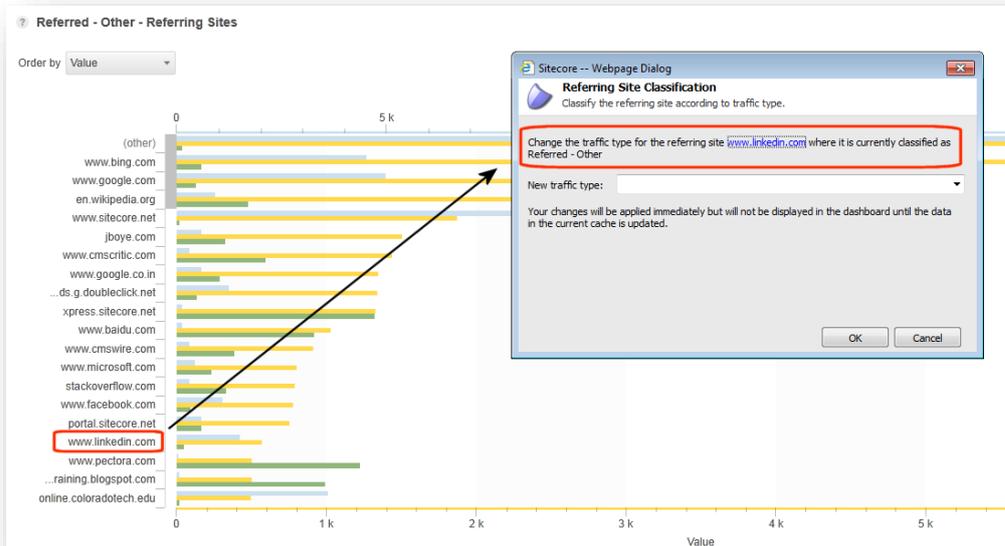
For example, open the *Traffic, Referred – Other, Referring Sites* chart:



Note

The Referring Sites chart is only available on *Search Engine - Organic* and all other referred traffic types.

Click the name of a referring site to see which category it belongs to.

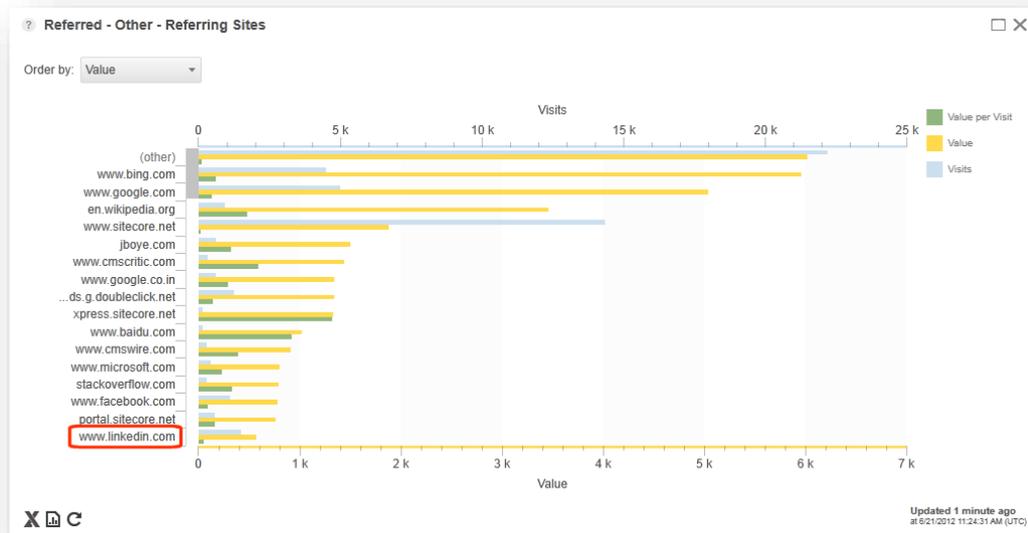


An SEO marketer needs to classify all visits that appear in the *Referred – Other* category to make the dashboard data more meaningful.

Some websites are easy to classify. For example, a visit from *fr.mg.yahoo.mail.com* is clearly the *Referred Email* traffic type. A referral from *google.com.qa* might be *Search Engine – Organic* or *Search Engine - Branded*. However, some referred visits are not so easy to categorize. If it is not possible to classify a visit straight away then it goes into the *Referring Sites – Other* category until you are able to re-classify it.

To classify or re-classify a visit:

1. In the Executive Insight Dashboard, choose *Traffic, Referred Other* and then select the *Referring Sites* chart to see a list of unclassified referring sites.

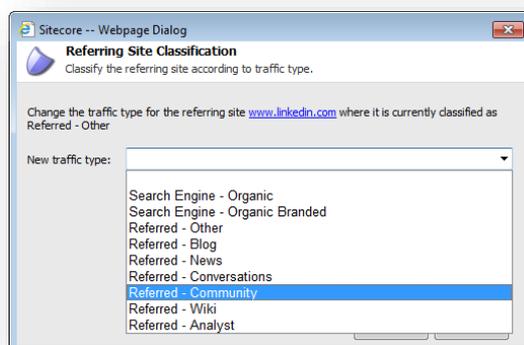


In the *Referred Other* chart you can see a list of referring websites. In this example, classify *www.linkedin.com*.

2. To classify a referring website, click the name of the referring site to open the **Referring Site Classification** dialog box.

To determine the correct traffic type you may need to view the referring website. Viewing the referring site will help you to determine whether the category is a *Referred - Blog*, *Referred News*, *Referred - Community* or something else that does not fit into any of the predefined categories (other).

3. When you have decided which category is appropriate, make a selection in the drop-down in the **Referring Site Classification** dialog box.



Classify *www.linkedin.com* as *Referred - Community*.

4. Click **OK**.
5. Click **Reload data**.

In the future all visitors coming from *www.linkedin.com* are classified as *Referred - Community*.

Note

When you classify a traffic type, the changes are applied immediately but are not visible in the dashboard until the data in the current cache has been updated.

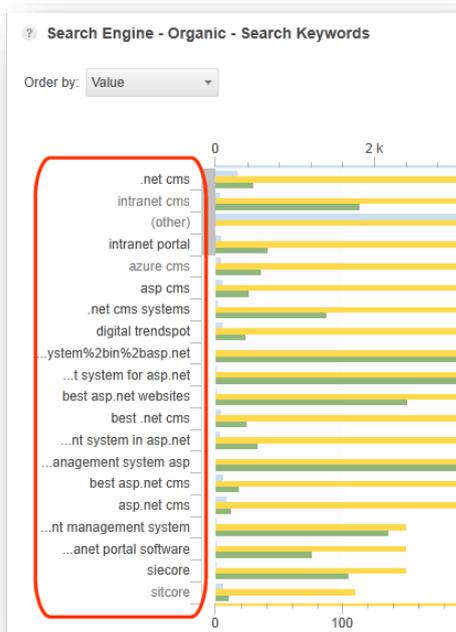
4.6 Assigning Brand Keywords

The Executive Insight Dashboard uses search keywords to identify whether a search engine search is organic or branded.

Definitions:

- **Search Engine Organic** – This is a search which does not use a product or company brand name in the search term, for example, *best cms*.
- **Search Engine Organic Branded** – This is a search which uses a product or company specific name in the search term, for example, *Sitecore cms*.

In the dashboard, when you open the *Traffic, Search Engine Organic, Search Keywords* chart you see a list of keywords used by visitors in their search engine searches.

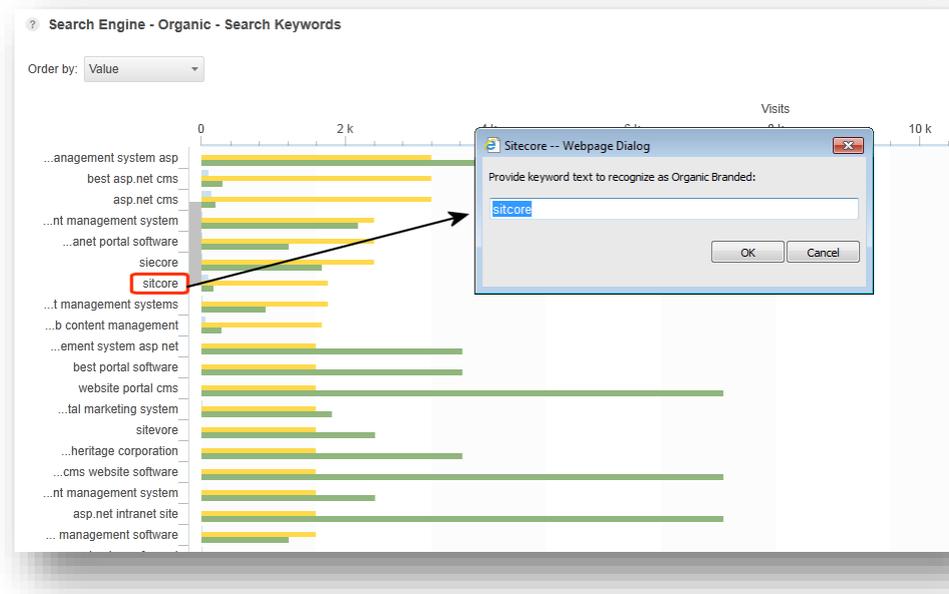


This list can include branded and non-branded keywords. If SEO marketers notice a branded keyword appearing on the list they can move it to the branded keywords list (*Search Engine – Organic Branded*).

To move a keyword from the *Search Engine - Organic* list to *Search Engine – Branded* list:

1. In the Executive Insight Dashboard, open *Traffic, Search Engine Organic, Search Keywords*.
2. Click one of the words in the list in the left axis of the *Search Keywords* chart. For example, the word '*sitcore*' appears on the list. This is an incorrect spelling of *sitecore*. Despite the incorrect spelling this was probably a search for Sitecore and should therefore go into the *Search Engine – Organic Branded* category.

3. Click the search keyword that you want to move.



4. In the **Brand Keywords** dialog box, click **OK** to move this entry to the *Search Engine – Organic Branded* chart.
5. Click **Reload data**.

Note

When you re-assign a branded keyword, the changes are applied immediately but are not visible in the dashboard until the data in the current cache has been updated.

Chapter 5

Appendix

This Appendix contains additional useful information that it was not possible to include in the main document.

- List of all Dashboards

5.1 List of all Dashboards

Traffic	Value	Visits	Value / Visits	Channel Performance	Brand Awareness	Source value	Source Value /Visits
All traffic types	✓	✓	✓	✓	✓	✓	✓
Search Engine - Organic	✓	✓	✓	✓			
Search Engine - Branded	✓	✓	✓	✓			
Direct	✓	✓	✓	✓			
Referred-Other	✓	✓	✓	✓			
Referred-Blog	✓	✓	✓	✓			
Referred-News	✓	✓	✓	✓			
Referred-Conversations	✓	✓	✓	✓			
Referred-Community	✓	✓	✓	✓			
Referred-Wiki	✓	✓	✓	✓			
Referred-Analyst	✓	✓	✓	✓			
Rss	✓	✓	✓	✓			
Email	✓	✓	✓	✓			
Paid	✓	✓	✓	✓			

Traffic	Search keywords	Entry pages	Referring sites	Site search	Assets consumed	Goal conversions
All traffic types	✓	✓	✓	✓	✓	✓
Search Engine - Organic	✓	✓	✓	✓	✓	✓
Search Engine - Branded	✓	✓	✓	✓	✓	✓
Direct		✓		✓	✓	✓
Referred-Other		✓	✓	✓	✓	✓
Referred-Blog		✓	✓	✓	✓	✓
Referred-News		✓	✓	✓	✓	✓
Referred-Conversations		✓	✓	✓	✓	✓
Referred-Community		✓	✓	✓	✓	✓
Referred-Wiki		✓	✓	✓	✓	✓
Referred-Analyst		✓	✓	✓	✓	✓
Rss		✓		✓	✓	✓
Email		✓		✓	✓	✓
Paid		✓	✓	✓	✓	✓

Campaigns	All campaign categories	Specific campaign
Value	✓	✓
Visits	✓	✓
Value / Visits	✓	✓
Campaign Performance	✓	✓
Referring Sites	✓	✓
Campaigns	✓	✓
Search Keywords	✓	✓
Entry pages	✓	✓
Site search	✓	✓
Assets consumed	✓	✓
Goal conversions	✓	✓