

guide

Sitecore Customer Engagement Platform Implementation and Process Methodology

A Lifecycle Approach to Building Value

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Overview

Empirically and anecdotally, the facts are in: Digital technology is firmly woven into everyday life, and plays an integral role in virtually every business and consumer purchase decision. In the digital arena, websites are the focal point at which companies engage customers in conversations that lead to:

- **Purchases** that contribute immediately to revenues
- **More efficient interactions**, thereby reducing costs
- **Long-term relationships** built on strong customer satisfaction.

Yet the website presents only one channel in the digital conversations companies conduct with their customers. In addition to the web, the conversation continues across email, social, mobile and ecommerce sites. How can companies ensure that conversations occur seamlessly, across channels, with no thread left loose or incomplete?

Sitecore Enables Seamless Customer Conversations

Targeted at helping mid-tier to enterprise companies to engage their customers seamlessly across all digital channels, the Sitecore Customer Engagement Platform was developed with a strong understanding of the conversational nature of today's marketing dialog.

The Sitecore solution was purpose-built to incorporate all the tenets of conversation, starting with the fact that it is a two-way interaction in which all participants have their own goals. There is a natural cadence to conversation, even online, and even as it may occur across a mix of channels. The Sitecore Customer Engagement Platform delivers all of the capabilities that allow a digital conversation between a prospect and company to flow:

- It remembers the previous interaction and continues where the conversation left off
- It “speaks” in the context of the prospect's needs vs. the needs of the marketing department
- It anticipates needs and is ready to help customers take the next step
- It asks questions of the prospect, to learn more.

Furthermore, the Sitecore Customer Engagement Platform spans all digital channels – web, email, ecommerce, social and mobile – to ensure that no conversation thread is dropped.

About This Document

Building strong relationships with highly engaged customers starts with a strategic approach and a structured plan. The Sitecore Customer Engagement Platform Implementation and Process Methodology presents a significant first step.

- **What it is:** A strategic process methodology that describes how to use the Sitecore Customer Engagement Platform to make online customer conversations more personalized, relevant and effective.
- **Whom it's for:** Senior managers in business, marketing and IT roles who are responsible for creating customer experiences that optimize business outcomes.
- **What it contains:** An overview of, and roadmap for, implementing Sitecore solutions for online customer engagement.
- **What it doesn't contain:** Detailed project plans or how-to technology discussion.

Figure 1 depicts how the Sitecore Customer Engagement Platform enables true Connected Marketing by weaving together the three key elements of conversation acceleration – Channels, Engagement and Customer Intelligence – into a cohesive solution.

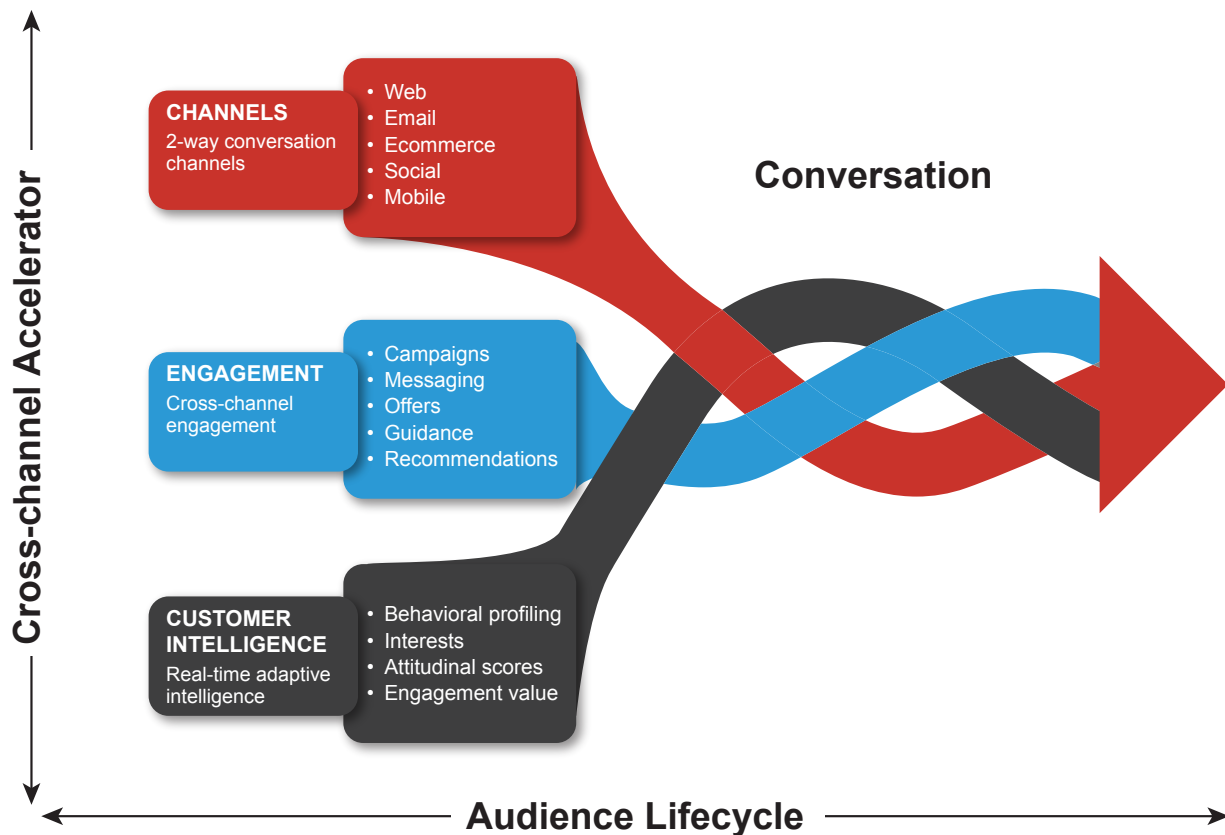


Figure 1: The Sitecore Customer Engagement Platform enables companies to have clear, cogent cross-channel conversations with customers, accelerating time-to-conversion.

Implementing Sitecore Solutions: An Accretive Process

As with any enterprise-class software application, the question becomes, “How can my organization implement these capabilities and achieve the associated business benefits?” Unlike large-scale “big bang” implementations of the past, typically employed with applications such as enterprise resource planning (ERP), sales force automation (SFA) and the like, the Sitecore solution can be implemented in a phased approach that is accretive in nature. As the organization’s ability to engage customers in conversations grows, corresponding Sitecore capabilities can be seamlessly added onto the core system.

The Sitecore Customer Engagement Platform implementation methodology does incorporate certain elements of classic application deployment practices. After an initial Assessment exercise, Sitecore customers will ideally undertake five sequential, cyclical implementation phases that comprise four steps: Analyze, Design, Build and Optimize. In executing these cycles, these companies progress toward customer engagement, implementing Sitecore product capabilities in an accretive manner.

Following this Overview, the balance of this methodology primer describes the four phases of implementing the

Sitecore Customer Engagement Platform. Each section also lists the activities that constitute the associated Analyze-Design-Build-Optimize cycle.

Fundamental Discovery: The Sitecore Assessment

Companies can quickly assess their appetite for Sitecore’s customer engagement capabilities by filling out the Sitecore Digital Maturity questionnaire, contained in full in the Appendix A of this methodology primer. The completed questionnaire is the key deliverable of the Assessment exercise. It contains 25 questions, ranging from “Do you use website analytics to measure traffic acquisition and site usage?” to “Can implicit or explicit customer behavior, in either an online or offline channel, trigger an action in the other channel automatically?” The questions are divided into five sections:

1. Basic
2. Tactical
3. Optimizing
4. Automation
5. Engaging

By filling in the questionnaire, weighting the answers and mapping them to a spider chart like that contained in Figures 2-3, companies can quickly visualize the maturity of their digital capabilities in each of the five areas, and where they would like to go.

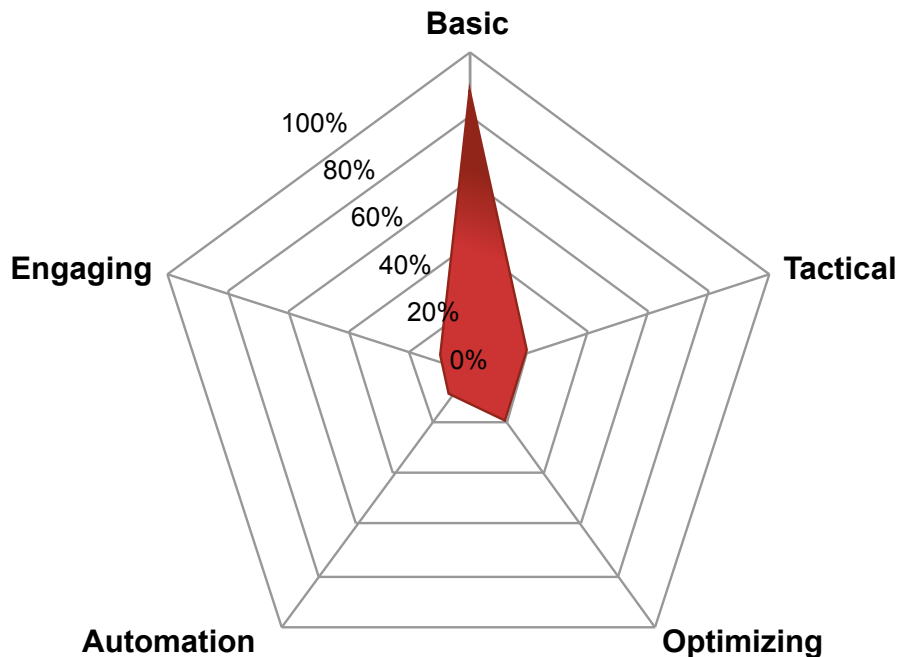


Figure 2: Companies can exhibit high levels of maturity in some areas and low levels in others, helping to determine their strategy for implementing the Sitecore Customer Engagement Platform. This spider chart illustrates Company A’s status quo.

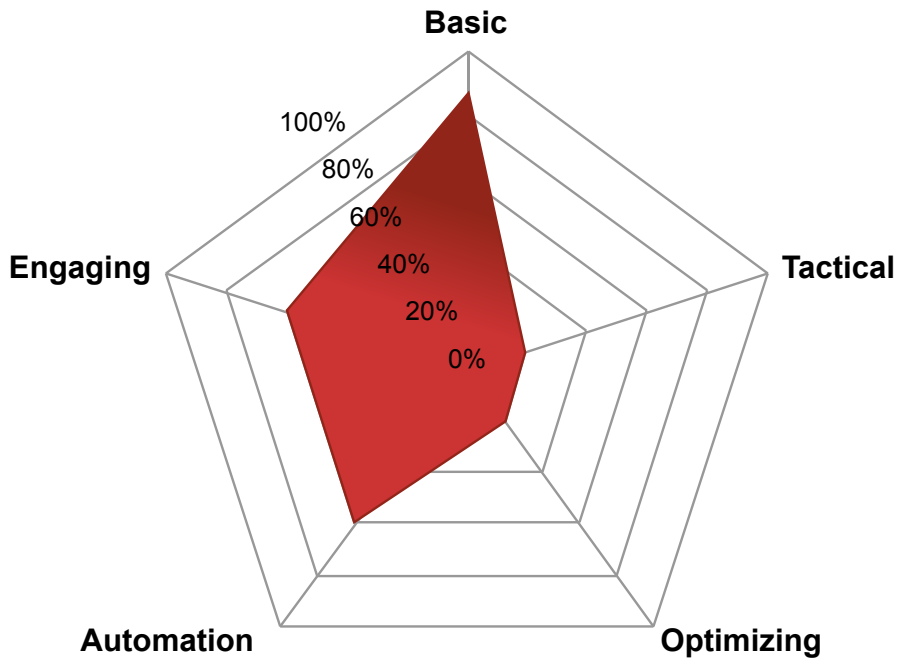


Figure 3: This spider chart shows Company A’s desired end-state for its digital maturity. Biggest changes need to happen in ‘Automation’ and ‘Engaging’ areas to achieve Company A’s goals.

Translating the Assessment into an Implementation Roadmap

Not surprisingly, the profile that emerges from the Digital Maturity questionnaire is indicative of the company’s technology adoption profile. Borrowing from the landmark 1991 high tech marketing book, “Crossing the Chasm” by Geoffrey A. Moore, companies can further scope their implementation plans by correlating their questionnaire results with their overall technology adoption profile. These five profiles are seen below, as the five stages of the Technology Adoption Cycle.

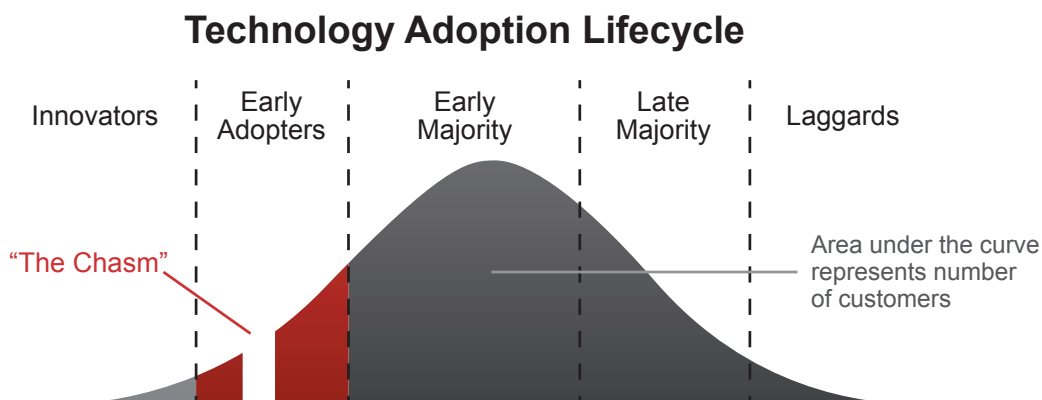


Figure 4: Most technologies, including Sitecore’s Customer Engagement Platform, are embraced along the Technology Adoption Lifecycle curve presented in Geoffrey Moore’s book “Crossing the Chasm.”

The correlation, then, between Sitecore’s phases of Digital Maturity and the Technology Adoption Lifecycle curve is as follows:

1. Basic → Laggard
2. Tactical → Late Majority
3. Optimizing → Early Majority
4. Automation → Early Adopters
5. Engaging → Innovators

Interpreting the Profile into Sitecore Functionality

Using this information, companies can begin attaching finite capabilities and key performance indicators (KPIs) to their Sitecore implementation strategy. For example, a company that scores highly on the Digital Maturity questionnaire’s Basic, Tactical and Optimizing sections would be considered an Early Majority adopter. In scoping its Sitecore implementation, this company would expect to implement levels 1, 2 and 3 of the Sitecore Digital Maturity model, below, and the corresponding Sitecore product capabilities. Or, if a company’s existing capabilities fulfill the first three levels of the Digital Maturity Model, the Sitecore implementation can be focused on Level 4. The Digital Maturity Model is further described in Appendix B at the end of this methodology primer.

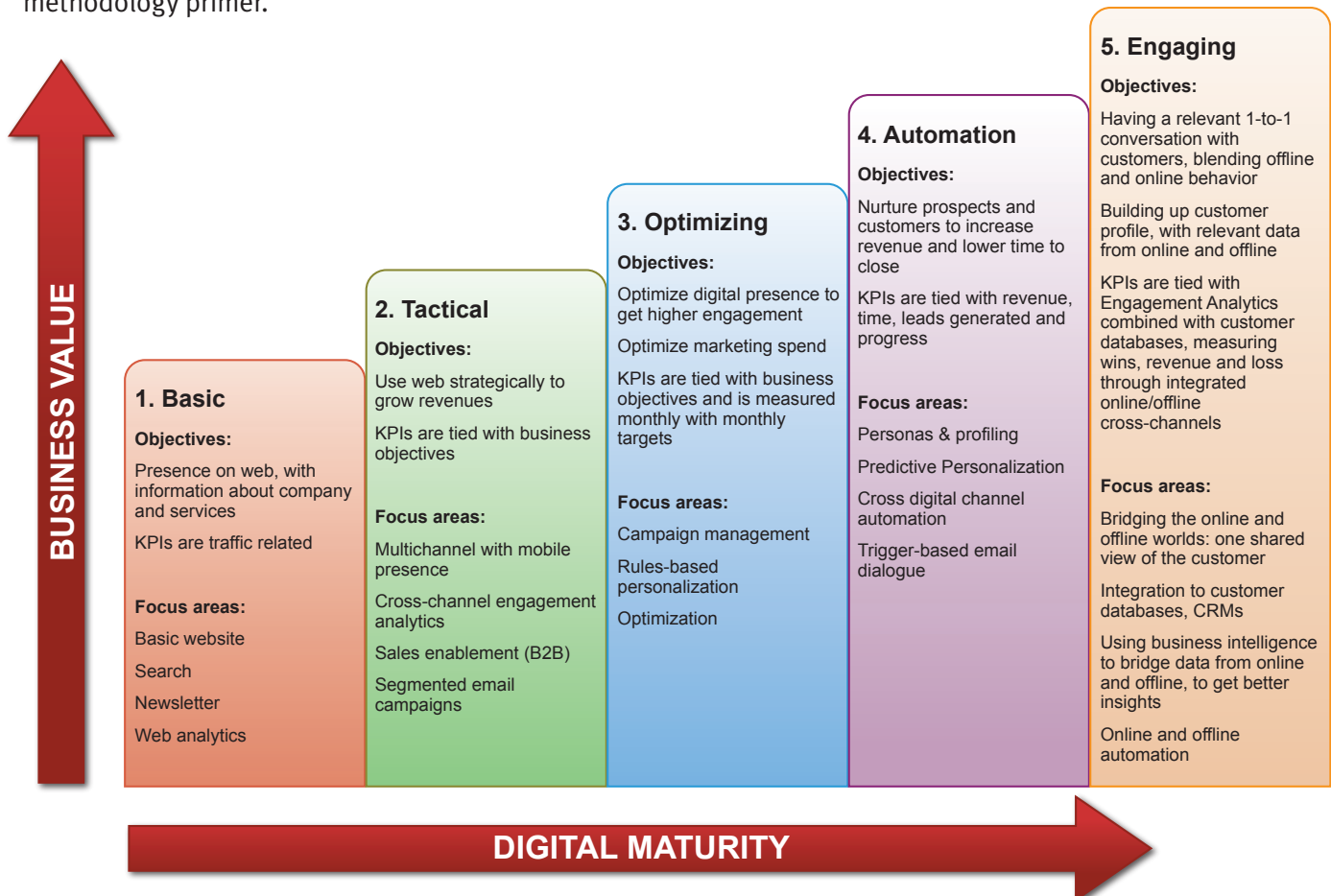


Figure 5: The five phases of Sitecore’s Digital Maturity model correlate to specific product capabilities, allowing companies to scope their implementation accordingly.

Synthesizing the various elements – the Digital Maturity questionnaire, the spider chart, the Technology Adoption Lifecycle curve and the Sitecore Digital Maturity Model – the overall implementation strategy emerges: *The first step is to deploy the Sitecore Customer Engagement Platform to the level a company is at today. As the organization (people) moves along the maturity model to higher levels, the company can implement the appropriate processes and technology, using a cycle of Analyze-Design-Build-Optimize.* As a corollary, all the goals within each phase need not be fulfilled in order to continue to the next phase – effort can be distributed across stages.

For a diagram that illustrates the Sitecore Customer Engagement Platform Implementation Methodology, please see Appendix C.

Digital Maturity Requires the Right Resources – and Cooperation

Industry experts concur that different online marketing resources are required, depending on an organization’s level of digital maturity. For example, Forrester Research states:

Online marketing suite adoption is a long-term initiative due to its dual dependence on organizational maturity and technology deployment. In practice this poses a challenge for most organizations, which may aspire to the online marketing suite’s benefits but lack the full set of foundational capabilities required to fully achieve its potential. Given this disconnect, what’s the best approach to online marketing suite adoption? Get on board as early as possible and develop capacity in stages.¹

Regarding the Sitecore Digital Maturity Model, it should be noted that implementations corresponding to the first three levels of the Digital Maturity model represent “low hanging fruit” and are relatively easy to achieve, while the last two levels are more advanced, and thereby enable true customer engagement across all digital channels. The higher in the Digital Maturity Model an organization wants to be, the more cross-department cooperation is needed internally.

The sections following describe each of the implementation phases in more detail.

Establishing a Digital Customer Engagement Strategy

Before embarking on any large-scale customer engagement initiative, Sitecore also recommends that customers have in place a Digital Customer Engagement Strategy that outlines the company’s:

- Digital vision
- Digital mission
- Digital goals mapped with business objectives
- KPIs for goals
- KPI targets
- Customer digital touch points and how the customer will be approached in each of them.

Sitecore Partners can provide experience and perspective in guiding companies through the strategy development process. Companies that wish to undergo this process on their own can choose from dozens of books written on the subject.

¹ Forrester Research, “The Road To The Online Marketing Suite: How CI Professionals Must Plan For The Future Of Cross-Channel Marketing.” Joe Stanhope et. al., March 4, 2011.

Level I-II: From Basic to Tactical

As companies embark on the journey toward customer engagement, the first step is a move from Basic to Tactical capabilities. Practically speaking, this translates into a shift from measuring quantity to measuring quality. Implementing Level I-II capabilities in the Sitecore Customer Engagement platform, and achieving a more qualitative view of online customer interactions, is accomplished through three steps.

Step 1: Sitecore Customer Engagement Platform Scoping Workshop

Delivered by a Sitecore Partner and/or Sitecore Business Optimization Services, this one-day workshop provides an overview of what can be achieved with the Sitecore solution, and prioritizes these possibilities according to a company's specific needs. Workshop topics include:

- Linking business objectives to online goals
- Understanding micro and macro goals
- Defining the most important target audiences
- Understanding visitor intent, behavior and phases
- Reviewing KPIs and targets
- Reviewing the possible scenarios and outcomes that can be achieved with the Sitecore Customer Engagement Platform
- Prioritizing implementation of Sitecore features according to value, resources, time and budget
- Creating a roadmap for implementing the Sitecore Customer Engagement Platform.

The output of this workshop is a clear understanding of how the Sitecore platform can be used to enhance customer engagement, and a corresponding implementation roadmap.

Step 2: Establishing Goals and Values

At this point, the *Digital Customer Engagement Strategy* (referenced above in Section I) comes into play. It is overlaid onto the Sitecore implementation roadmap (the output of the aforementioned Step 1 workshop) and is used to define tactical goals in the Sitecore Customer Engagement Platform. Goals should always be relevant to the customer, and described in terms of potential customer needs. The goals, then, for the Basic-Tactical phase could include:

- A lead form filled out at a B2B site
- An ecommerce order completed
- A local store located on a retail site
- A self-service e-form completed by a visitor to a government site.

Engagement Value Points: Background Reading

By using Engagement Value points, companies can measure quality over quantity, and gain better insight into visitor commitment.

For more information, please see the Sitecore white paper "[From Web Analytics to Engagement Analytics](#)," available online or by scanning the QR Code below:



Assigning Engagement Value Points

Working through Step 2, participants can tighten their goal-setting parameters by using *Engagement Value Points*, a unique method for measuring each visitor’s level of commitment to a company’s website.

Pioneered by Sitecore, Engagement Value Points assign and measure the value of specific visitor actions. To effectively use this metric, companies should combine past online data with input from internal stakeholders to determine which actions demonstrate varying levels of visitor commitment. If past data is not available, the implementation team can predict which actions lead to revenue and map these actions into ascending levels of commitment, as presented in Figure 6.

High Commitment (100 Engagement Value Points)	Lead form filled out Order completed
Medium Commitment (50 Engagement Value Points)	Participating in webinar
Medium-Low Commitment (10 Engagement Value Points)	Sign-up for newsletter Registering for webinar Download whitepaper
Low Commitment (5 Engagement Value Points)	Find local store Voting in a poll

Figure 6: Visitors’ online actions can be assigned Engagement Value Points, an important step in quantifying the path to customer engagement.

Step 3: Engagement Analytics

Once goals and Engagement Value Points are set, companies implementing the Sitecore solution can start to gain valuable marketing and business insights from Sitecore Engagement Analytics. This data shows which traffic sources, keywords, etc. provide the highest values – and which don’t – without any additional programming required.

There are three dimensions in Engagement Analytics: Visits, Value and Value per Visit. While many traditional analytics packages focus on statistics like average time spent per visit, Engagement Analytics calculates the value and the value of each visit. This information, in turn, can be used to optimize the overall effectiveness of marketing spend.

The Engagement Analytics Dashboard in Figure 7 visually illustrates how engagement ebbs and flows, in the context of examining a search campaign.

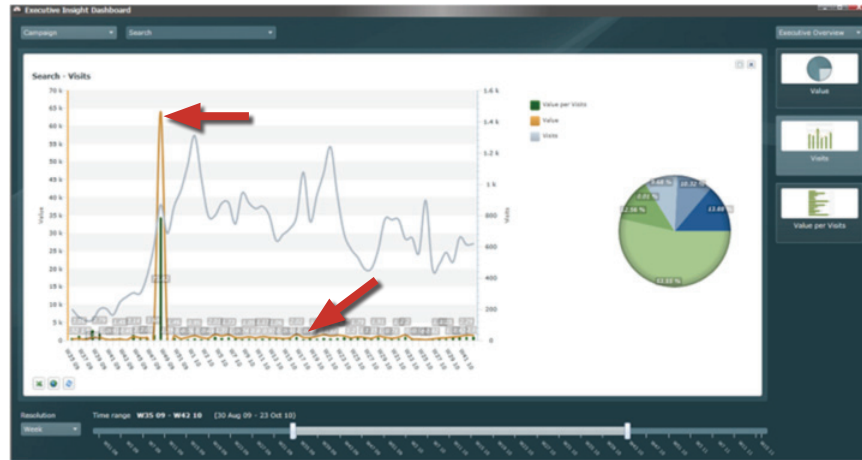


Figure 7: Sitecore’s Engagement Analytics Dashboard allows users to drill into the engagement results generated by specific campaigns.

The Traffic (gray line), on the picture to the right shows peaks and valleys, and an overall decrease in the most recent weeks. The Value (orange line) offers two important insights:

- The Paid Search Campaign done in the week of December 2 was effective (first arrow), indicating that more marketing funds should be spent here, as it resulted in very engaged visitors.
- Other than that week, engagement values are very low (second arrow) – further evidence that specifics of the search campaign should be examined and optimized to sustain higher engagement levels; otherwise, marketing dollars are being wasted.

This kind of engagement value analysis can be first applied to channels that bring the most engaging visitors, to determine which elements need to be optimized. Secondly, engagement value analysis can be applied to keywords and landing pages. A natural next step is to use it to track marketing campaigns, to measure and analyze them.

SUMMARY OF LEVEL I-II: FROM BASIC TO TACTICAL

PREREQUISITES	ANALYZE	DESIGN	BUILD	OPTIMIZE
<ul style="list-style-type: none"> • Basic website • Newsletter <p><i>These prerequisites translate into a 60% achievement of maturity at the Basic level.</i></p>	<ul style="list-style-type: none"> • Review KPIs, which are closely tied to business objectives • Conduct Scoping Workshop to review channels, customer segments and touch points 	<ul style="list-style-type: none"> • Create roadmap for implementing the Sitecore Customer Engagement Platform • Create Engagement Value Point scale 	<ul style="list-style-type: none"> • Configure and assign Engagement Value Points to micro and macro goals • Assign goals to page actions 	<ul style="list-style-type: none"> • Use the Engagement Analytics Dashboard for insights and recommendation • Adjust Engagement Value Points ratios according to real ratios, building on findings from data analysis

Level III: From Tactical to Optimizing

As companies extend their implementation of the Sitecore Customer Engagement Platform, moving up from a Tactical to Optimizing position on the Sitecore Digital Maturity Model, their knowledge of what drives engagement solidifies from *guessing* to *knowing*.

Implementing the Sitecore features below will help companies optimize their customer engagement capabilities.

Campaign Management

Sitecore Campaign Management allows the efficacy of marketing campaigns to be tracked across all digital interactions with customers. This can encompass a wide range of campaigns:

- Banner ads
- Paid search
- Email
- Referrals
- Social media campaigns (Twitter, Facebook, etc.)
- Offline campaigns, by using vanity URLs and QR or 2D barcodes.

To get started with Campaign Management, companies need to:

1. Gather information on all of the company's activities, both offline and online, that deliver traffic to controlled digital channels
2. Configure these activities (campaigns) in Sitecore Campaign Management
3. Enable campaign tracking for activities linking to controlled digital channels
4. Use Engagement Analytics to optimize marketing effectiveness

By starting with configuring the top 10 most important campaigns in the Sitecore Customer Engagement Platform, companies will immediately see the effectiveness of those campaigns. Configuration is simple and quick.

Because the Sitecore solution is an integrated platform, measuring cross-channel engagement is truly a straightforward exercise. By sending out an email via the Customer Engagement Platform, Sitecore automatically adds campaign tracking and link tracking, which can be used with Engagement Analytics. With separate tools, users would need to manually add tracking codes and campaign IDs sent out, just to measure the effect.

Rules-based Personalization

Personalization is one of the key factors to maximizing campaign effectiveness. It allows individual users to be targeted with highly relevant content, toward various goals. The Sitecore Customer Engagement Platform makes personalization a natural and intuitive part of the content production process, allowing a wide range of campaign landing pages, emails or other site elements (such as site-wide calls to action, videos, sidebars, etc.) to be easily configured to deliver personalized content.

These personalization capabilities start the moment a visitor arrives on the site; the Sitecore solution immediately catalogs key digital fingerprint information including:



Figure 8: Sitecore immediately recognizes key digital fingerprint data, which can be used with rules-based personalization on keywords, location, visitor identification, referrals, campaigns and goals.

To get started with rules-based personalization, companies must find the most effective places on the website to create high-relevancy content. The digital fingerprint plays a key role in finding the precise locations at which to maximize the interaction real estate, focusing the content to drive the desired visitor outcome. Typically, with campaigns, the objective is to associate relevant content to the topic of the campaign.

The table below illustrates the impact of personalization:

Question	How Personalization Is Applied	Impact	Time	Resources	Total
Do you have one website that targets different countries?	Consider using personalization based on which country the visitors are from. Personalization elements could highlight offers/contacts/cases from that specific country.	(1-10)	(1-5)	(1-5)	1xTxR
Do you offer several different services or products, and is search driving much traffic to your website?	Consider personalizing on most important services or product related keywords. Place personalization spots in key positions and target with relevant content, specific for the keyword.	(1-10)	(1-5)	(1-5)	1xTxR
Are you running several campaigns to attract traffic to your website? Are the messages on those campaigns different?	Consider personalization that depends on which campaigns the visitors are coming from. An example could be to highlight a Facebook competition, to visitors clicking from a Facebook campaign.	(1-10)	(1-5)	(1-5)	1xTxR

Do you receive traffic from external sites with varying demographics?	Consider personalization according to which sites visitors are clicking from – this could be highly indicative of visitor intent.	(1-10)	(1-5)	(1-5)	IxTxR
Do you have a long selling cycle with multiple stages?	Consider using process goals to target visitors with relevant content, depending on how long they are in the process. For example, if visitors have signed up for the newsletter, the next step is to get visitor to request a phone call.	(1-10)	(1-5)	(1-5)	IxTxR

Figure 9: To get started, fill out the impact with a value from 1-10 (ascending value), Time and Resources from 1-5 (with 5 as requiring the least time/resources to implement). Multiply Impact x Time x Resources; the item one with the highest value is the place to start.

A/B Split and Multivariate Testing

Websites are created with the best intentions, and often the best creative and technical resources. Unfortunately, many assumptions made during the site’s design can later turn out to be wrong. To truly know what works and what doesn’t, content, design and interaction flows must be tested. The Sitecore Customer Engagement Platform allows hypotheses to be easily tested with integrated A/B split and multivariate testing tools.

- An *A/B split test* is a simple test of one element tested against n number of variations. Variations are defined as the original element tested against n number of variations. Elements can be anything, from a spot to the text on a label.
- A *multivariate (MV)* test entails testing several elements with several variations. For example, on a website with landing pages that foster low engagement, multivariate testing allows elements including headline, picture and call-to-action message to be tested against each other, to see which combination results in the highest engagement.

To get started with optimization through testing, companies need to:

1. Identify key impact sections, such as where important calls to action are placed.
2. Determine which elements can be tested.
3. Prioritize the testing of these elements using the Impact, Time and Resources sum for each, as applied with the rules-based personalization.
4. With *high-traffic* sites, enable multivariate testing if there is more than one element on each page. Deploy A/B split testing of these elements at *low-traffic* sites.
5. Run the test until data is statistically significant and determine the test winner.
6. Continue to the next element on the prioritized list and test it.

SUMMARY OF LEVEL III: FROM TACTICAL TO OPTIMIZING

PREREQUISITES	ANALYZE	DESIGN	BUILD	OPTIMIZE
<ul style="list-style-type: none"> Cross-channel Engagement Analytics Segmented email campaigns <p><i>These prerequisites translate into a 50% achievement of maturity at the Tactical level.</i></p>	<ul style="list-style-type: none"> Define the framework for periodic KPI reporting and targets Gather intelligence on marketing efforts, with a view toward linking them to digital channels Identify key impact sections across digital channels 	<ul style="list-style-type: none"> Develop strategies for optimizing key impact sections through testing and personalization Implement campaign management reporting 	<ul style="list-style-type: none"> Configure campaigns in the Sitecore Customer Engagement Platform Configure key impact sections through testing and personalization 	<ul style="list-style-type: none"> Review marketing effectiveness and optimize marketing spend Review optimized key impact sections and further refine them

Level IV: From Optimizing to Automation

Having implemented the Sitecore Customer Engagement Platform at Levels I-III of digital maturity, companies can expect to experience growth in the value their digital channels contribute, and cost savings through more optimized marketing spend. By taking the next step in building an engaging digital presence, these companies can move from the Optimizing stage to Automation – and in doing so, move from understanding visitors’ digital fingerprints, to understanding and reading their digital “body language,” and dynamically adapting the site to customers’ needs.

Creating an Attractive Digital Presence

The objective is simple: To create a digital presence that attracts and engages prospects and customers. The more engaging the site, the better business objectives can be achieved.

However, all visitors are not equal, and one-size-fits all user experiences rarely work. They take different paths, have different intents on the website, and move through different phases in a buying cycle. Visitors’ behavior on a company’s websites and in emails can give a tremendous amount of insight into their current needs and intentions. This behavior – which starts with a digital fingerprint and then goes much deeper, developing into digital body language – can be used to intensify customer engagement, and will take relevancy to a whole new level.

The steps below show how to build an effective lead-to-revenue model with a digital presence that meets the needs of visitors who will deliver the desired business results.

1. Start with engagement goals – what do you want visitors to do on the site? These goals should be as transaction-oriented as possible, to elicit commitment and thus engagement.
2. Segment visitors into specific target groups.
3. Use personas to describe a visitor, within a target group.

4. Which stages do the different personas have in their respective buying cycles? What is their behavior in each stage?
5. Which information is needed to satisfy the need of a persona in a given stage, making them want to take the desired actions? This process can be effectively characterized as Attention – Interest – Desire – Action (AIDA).
6. Which touch points does the persona have through the different stages? What is the best way to conduct a conversation through these touch points?

Breaking Down the Buying Cycle

Whether consuming goods, information or services in the private or public sector, a buying cycle typically moves through the following phases:



Figure 10: A customer enters a buying cycle based on need, a problem or just “I want that.” The visitor then moves through the various stages before buying at a company’s site, or one of its competitors’.

Throughout this process, visitors to all digital channels do much searching, evaluating and decision-making, consuming and digesting the available information. By building an engaging digital presence, companies can

Sitecore Predictive Personalization: Background Reading

Sitecore Predictive Personalization targets visitors with relevant content in real-time, according to their behavior, as mapped using content profiling. This implicit personalization capability effectively eliminates the previous enormous complexity of generating rules for all different types of customer behavior. For more details, please see the document “Profiling and Predictive Personalization with the Sitecore Customer Engagement Platform,” available online at www.sitecore.net/predictivepersonalization or by scanning the QR Code below.

This guide describes an easy seven-step process for getting started with Predictive Personalization:

- Step 1. Identify the “Who” and the “Why”
- Step 2. Configure Profiles
- Step 3. Configure Profile Cards and Personas
- Step 4. Profile content
- Step 5. Configure predefined visitor patterns
- Step 6. Create personalization based on patterns
- Step 7. Adjust and optimize



plan which content is relevant for specific visitors in a specific stage of the buying cycle, so the right visitor can be targeted with the right information at the right time. In order to accomplish this, the digital channel needs to be able to “listen” to each visitor, discern where the visitor is in the buying cycle, what they’re interested in, and then steer the visitor toward the appropriate products and services.

Why do the extra work? By being able to respond to each individual visitor’s need, companies can make the presented content much more relevant, which in turn will make more impact and be more likely to engage that visitor. As illustrated in Figure 12 below, better engagement translates directly into higher propensity to purchase.

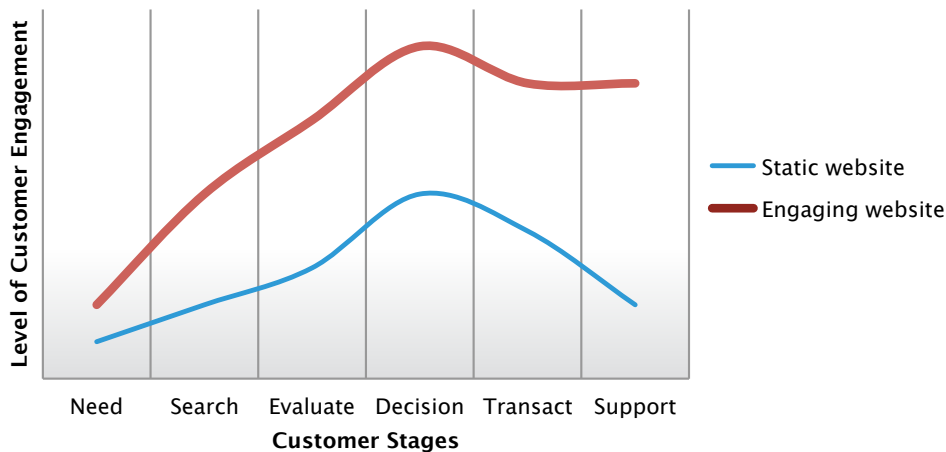


Figure 11: Engaging websites are more successful in bringing visitors closer to the desired actions in all stages of the buying cycle.

The examples used are of a classic buying cycle, applicable in B2B, B2C and ecommerce sales. This model is also applicable to a wide range of consumption patterns, such as:

- Website visitors who are looking for job info/postings/etc.
- Journalists who are looking for information about a company, and access to press materials
- Investors looking to invest in a company
- Employees looking for news about the company they work for.

With all of these examples, buying cycle states can be outlined and mapped to relevant content that leads to the desired actions.

Sitecore Enables Predictive Personalization

With the Sitecore Customer Engagement Platform, companies can build an engaging digital presence without programming. Most of it is a process in which customer needs are analyzed and personalization scenarios established. The Sitecore solution senses visitor needs based on their behavior or digital body language and adapts the presented information accordingly, a capability Sitecore calls *Predictive Personalization*. This capability effectively addresses the largest challenge in personalization: the enormous complexity of rules that must be generated for all different types of customer behavior.

The platform’s Predictive Personalization configured by a customer’s own resources, a Sitecore partner and/or Sitecore Business Optimization Services.

Achieving True Engagement Automation

Engagement Automation allows companies to create *engagement plans*, or process flows that can be used to nurture leads and get them sales- or purchase-ready.

Many businesses make the common mistake of handing all leads over to Sales immediately. For example, a visitor in the initial consideration phase of buying a product may download a white paper. If this lead is given to the sales organization, a call to the visitor will be likely met with a chilly response – “Just looking,” “Aren’t ready yet,” etc. Sales will label this a bad lead and most likely the next visitors registering for white paper won’t get any attention from Sales, because they are “bad leads.”

Instead, marketing and sales organizations should work to identify what constitutes a lead – and which information is typically required by a lead in the early stages of the buying cycle. A revised scenario is therefore: When a visitor registers for a white paper, they automatically become a *Marketing-accepted lead*. Marketing will now nurture the lead with relevant information, appropriate to the lead’s stage. Once the lead shows signs of advancing in the buying cycle, they become a *Sales-accepted lead*, and the lead transfers over to Sales.



Figure 12: Engagement Automation allows leads to be nurtured with relevant information according to their specific stage in the Buying Cycle.

The Next Step: Engagement Automation

Establishing Engagement Automation is a straightforward process, leveraging *Relevancy Maps* and *User Journeys*. These models interpret visitor intent and behavior into buying cycles.

Relevancy Maps and User Journeys then can be synthesized into an Engagement Plan, which can be used in many ways, including lead nurturing, event follow-up, “no lead left behind” and other initiatives. The example Engagement Plan below pertains to customer event follow-up; it contains scheduled reminders and follow-ups, with an aim of further engaging the event’s attendees.

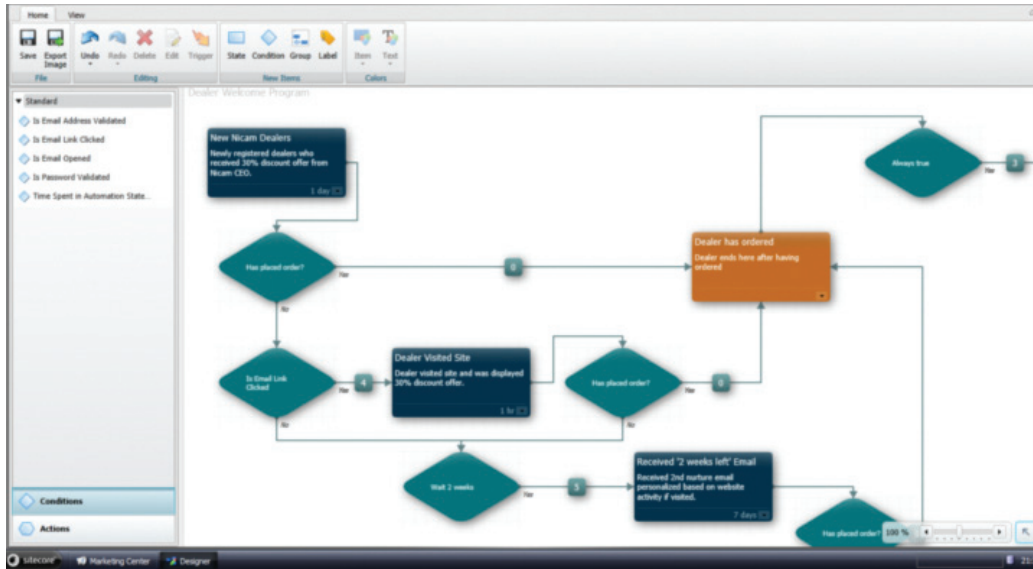


Figure 13: This sample Engagement Plan was used in conjunction with a customer event.

In terms of executing Engagement Plans, the Sitecore Customer Engagement Platform features an integrated Email Campaign Manager that can be used to send out trigger-based emails. The statistics generated by these email campaigns, such as open and click-through rates, are automatically captured in the Sitecore Engagement Analytics database.

The Email Campaign Manager can also be used to proactively send emails to segmented recipients for more traditional email marketing campaigns. This segmentation can be done within Sitecore or can be based on a customer database that is integrated with Sitecore.

SUMMARY OF LEVEL IV: FROM OPTIMIZING TO AUTOMATION

PREREQUISITES	ANALYZE	DESIGN	BUILD	OPTIMIZE
<ul style="list-style-type: none"> Campaign management <p><i>This prerequisite translates into a 30% achievement of maturity at the Optimizing level.</i></p>	<ul style="list-style-type: none"> Interview stakeholders, such as key sales representatives, to learn important touch points in lead-to-revenue model Facilitate a workshop to develop profiles, personas and User Journeys Map customer behavior across touch points, and tie it to lead-to-revenue model Define scope for customer progress KPIs 	<ul style="list-style-type: none"> Establish automation triggers according to accomplished behavior Design Relevancy Map with persuasive content Develop key profiles and personas 	<ul style="list-style-type: none"> Create personas and profile cards Establish patterns and personalization Create Engagement Plans 	<ul style="list-style-type: none"> Optimize the lead-to-revenue model Measure and optimize the automated dialogue that occurs across digital channels

Level V: From Automation to Engaging

Achieving Level 5 of the Sitecore Digital Maturity Model entails gaining a holistic view of each customer – a business transition that requires seamless integration between the online and offline worlds. By achieving a view of customer behavior that spans every touch point, companies can:

- Communicate with customers faster with more relevance
- Quickly react and adapt to changes in customer behavior, in both the online and offline worlds
- Better predict revenue and proactively react to revenue trends, across channels
- Gain a shared, holistic view of customer profiles and use the sum of this data to gain important insights that can catalyze business transformation.

In the Sitecore Digital Maturity Model, Engagement is enabled by storing cross-channel customer behavior data in a central customer database that consolidates all online and offline customer intelligence. With tight integration between online and offline data, automation becomes a key driver to react to changes in an individual prospect’s activity in a Relevancy Map or their User Journey. Specifically, using the Sitecore Customer Engagement Platform, companies can use on- and offline customer intelligence to:

- Identify cross-channel opportunities to foster deeper engagement
- Identify triggering moments to drive action
- Design interaction flows
- Test hypotheses across various user segments
- Analyze and optimize plans.

These steps can be determined in an Engagement Workshop, facilitated by a Sitecore Partner and/or Sitecore Business Optimization Services. The Engagement Workshop focuses on customer touch points, including reviewing and extending Relevancy Maps and User Journeys, to also include offline channels.

How Cross-channel Engagement Works in the Real World

The example below, of a car buyer, shows how closely online and offline channels are intertwined, and the company’s appropriate automated reaction.

Customer Behavior	Channel	Visitor Profile	Automation
Customer searches in Google for “Safe economical minivan,” enters website and signs up for email.	Online - Search and website	Profile created with name and email, interested in safe economical minivan.	Send relevant content regarding safe economical minivans through email.
Customer opens email clicks on “Test drive minivan link” and submits on website for test drive.	Online - Email and website	Goal: Signs up for minivan test drive	Send confirmation link, asking for further details.

Customer opens confirmation email and submits additional details about gender, birthday and previous car.	Online - Email and website	Gender, birthday and previous car added to profile.	Send email reminder one day prior of test drive, send SMS morning of the test drive with driving instructions.
Customer test drives minivan, talks to car salesperson about finance and safety for their newborn child.	Offline - Car Dealer	Car salesman adds “Concerns about safety for newborn” and “Needs to be financed” to profile.	Send email about safety two days after test drive. Send email about finance options one week after test drive.
Customer clicks on finance options, calculate loan and start payment.	Online - Email and website	Add specifics about selected finance to profile.	Sent alert to car salesman, scheduling a phone call to customer.

Figure 14: True engagement requires that customers be accompanied on each path of the purchase decision-making process, both on- and offline.

This example illustrates the fact that when customer conversations can be coordinated across channels, and true engagement achieved, the sales process accelerates dramatically. However, to achieve success at the Engaging level, it is critical to establish a central data hub that is a comprehensive repository of customer information, potentially consolidating information from enterprise resource planning (ERP), customer relationship management (CRM), support desk and online behavior tracking applications. The central hub affords a holistic view of each single customer, and should provide access to continuously updated information in real-time.

SUMMARY OF LEVEL V: FROM AUTOMATION TO ENGAGING				
PREREQUISITES	ANALYZE	DESIGN	BUILD	OPTIMIZE
<ul style="list-style-type: none"> • Cross digital channel automation • Trigger-based email dialogue <p><i>This prerequisite translates into a 45% achievement of maturity at the Automation level.</i></p>	<ul style="list-style-type: none"> • Analyze online and offline customer touch points, using profile data repositories • Facilitate workshop around customer touch points, including reviewing and extending Relevancy Map and User Journeys, to also include offline • Define central hub with integrations to online and offline customer touch points 	<ul style="list-style-type: none"> • Map online and offline customer touchpoints with the profile data repositories used to create the central hub profile • Map online and offline behavior to unified cross-channel Automation in the Sitecore platform 	<ul style="list-style-type: none"> • Integrate profile data repositories to central hub profile • Configure unified cross-channel Automation 	<ul style="list-style-type: none"> • Measure and optimize unified cross-channel lead-to-revenue model • Use online and offline business intelligence (BI) tools to develop insights for recommendations

Summary: Leveraging the Sitecore Solution Beyond Customer Engagement

Cross-channel conversations that follow the customer seamlessly are the “holy grail” of online marketing – and the key to a successful online business. By orchestrating cross-channel conversations, the Sitecore Customer Engagement Platform allows companies to take a giant step toward achieving their business goals by engaging in meaningful conversations that more quickly convert prospects into buyers with:

- *Prospect-driven conversations*: Sitecore uniquely allows prospects to lead the conversation by enabling marketers to easily mold personal, highly relevant marketing conversations based on stated and implicit preferences.
- *Real-time relevance*: Sitecore additionally interprets individual prospects’ website activities in real-time, ensuring that relevant content is served through dynamic personalization.
- *Greater agility*: Through a continuous cycle of experimentation, evaluation and “try again,” Sitecore allows companies to quickly adjust their marketing activities to capitalize on successful techniques.

These core capabilities can be extended to other key areas including:

- *Sales enablement* through geo-IP lookup of visitors, returning information about corporate networks’ origins, and identifying home users’ ISPs. Geo-IP lookup provides a broad range of information:
 - Country
 - City
 - Latitude
 - Metro Code
 - ISP
 - Region
 - Postal
 - Longitude
 - Area Code
 - Organization

This information allows companies to classify visitors along the lines of:

- Business visitor (prospect)
- Press
- Business partner
- Existing customer
- Supplier
- Competitor, etc.

A wide range of reports can be sent to Sales and Marketing to segment and distribute these leads, and also as follow-up leads for press and analyst relations. With Sitecore, companies can drill down into single visitors’ behavior and track activity on the site. For B2B companies in particular, sales enablement with Sitecore data is critical. Scheduled reports on Business Visitors and Existing Customers allow Sales to monitor new and incremental opportunities with fine granularity.

- *CRM integration* allows data from the Sitecore Customer Engagement Platform to be merged with customer databases. This helps to integrate online behavior with offline behavior, building up customer profiles by using cross-channel customer intelligence. Customer relationship management integration also gives the sales organization easy access to relevant information about business visitors and existing customers.

Designed for Cross-channel Conversations

The Sitecore CMS architecture is designed to enable seamless cross-channel conversations across any present or future device. It natively supports multi-device output, allowing any page or piece of content to be repurposed in any format. By separating content from presentation and using the concept of devices, Sitecore allows the same content to be easily presented in multiple formats. These formats can include web browsers, mobile devices, search engines, printers and future devices.

Each content item, whether a press release, product page or account screen, can be associated with any number of devices, and each device can trigger different layout and rendering components. Whether the demand is for multiple smartphone formats, printer-friendly layouts, RSS feeds, or XML, there is no limit to the variety of the different devices and content layouts that can be deployed.

As a result, implementing the Sitecore Customer Engagement Platform across the Sitecore Digital Maturity Model uniquely catalyzes all organizations' ability to deliver value by providing:

- The right content, across the right channel, at the right time
- More revenue, faster sales cycles and proven value
- Clear, comprehensive prospect data that drives interactions
- A true solution that optimize the total conversation, not the siloed channel
- A consistent, positive brand experience.

For more information about Sitecore, please visit www.sitecore.net.

About the Author

Lars Birkholm Petersen has 13 years' experience with web content management. He has participated in many different roles – including web development, search engine optimization, project management and business development – in over 100 different website projects as well as WCMS product development.

Today Lars heads Sitecore Business Optimization Services, helping customers and partners achieve their goals with online business optimization.

About Sitecore

Sitecore redefines how organizations engage with their customers online, powering experiences that can sense and adapt to a customer's needs to increase revenue and customer lifetime value and satisfaction. Sitecore was the first Web Content Management system (WCM) to incorporate marketing automation, intranet portal, e-commerce, web optimization, social media and campaign management technologies into a cohesive, integrated open platform. Sitecore's software makes it easy for businesses to identify, serve, engage and convert new customers online.

Sitecore's broad choice of capabilities enable marketing professionals, business stakeholders and information technology teams to rapidly implement, measure and manage a successful website and online business strategy. Its powerful development platform, integrated marketing automation tools and intuitive editing workspace enables successful websites of all types.

Thousands of public and private organizations have created and now manage more than 30,000 dynamic websites with Sitecore including ATP World Tour, Computer Associates, ISS, Lloyd's of London, Microsoft, Omni Hotels, Siemens, Thomas Cook and The Knot.

For more information about Sitecore, please visit www.sitecore.net.

Appendix A: Sitecore Digital Maturity Assessment Questionnaire

How mature is your company's digital strategy? To gain insight into your business' Digital Maturity, answer the questions below with *Yes* or *No*. When you answer *Yes*, put the *Weight* for that row, into the *Score* field.

When you have answered all questions, add the *Weight* column for each *Yes* and write the *Total* in the *Total Score* field. You can now gauge your organization's maturity in each of the five categories.

Basic

Question	Weight	No	Yes	Score
Do you have a website?	40%			
Do you have site search?	20%			
Do you have email newsletters for which recipients can change their permissions at the site?	20%			
Do you use website analytics to measure traffic acquisition and site usage?	20%			
				Total Score

Tactical

Question	Weight	No	Yes	Score
Are you measuring quality outcomes through your website analytics?	30%			
Are quality KPIs tied with business objectives?	30%			
Do you have a mobile presence, where website content is reused?	20%			
Can you measure quality outcomes from website, email campaigns and mobile activities in the same analytics tool?	10%			
Are you able to segment email recipients into different email lists, based on Implicit or explicit data?	10%			
				Total Score

Optimizing

Question	Weight	No	Yes	Score
Are you measuring effectiveness of your marketing spend with regard to digital channels?	30%			
Do you have integrated campaign management with all your Digital Channels?	20%			
Do you use A/B split or multivariate testing to optimize outcomes? Do you do so based on quality, rather than a single success criterion?	20%			
Do you use real-time personalization to deliver relevant content, based on a visitor's searched keywords, location, referrals or inbound campaign triggered?	20%			
Can your marketers create and control campaign management, testing and personalization, without involvement from IT or web analysts?	10%			
Total Score				

Automation

Question	Weight	No	Yes	Score
Do you use automation, to respond to implicit visitor behavior, across your digital channels?	30%			
Do you have a central visitor profile repository, where you profile each visitor individually with both implicit and explicit data?	15%			
Are any of your KPIs related to "Time to revenue", "Leads generated" or "Lead progress"?	15%			
Do you have integrated implicit personalization, which acts on visitors' browsing behavior?	15%			

Can implicit visitor behavior trigger email dialogue and, by reacting on the email, can you deliver personalized targeted content anywhere on your website, without manually tagging the email with campaign IDs? 15%

Does your solution make it possible to create new subsites and e-forms without IT involvement? 10%

Total Score

Engaging

Question	Weight	No	Yes	Score
Do you have central repository for customer profiles, blending behavior from both online and offline channels?	30%			
Do you use cross-channel customer intelligence as a predictor of revenue?	20%			
Can implicit or explicit customer behavior in either the online or offline channel, trigger an action in the other channel automatically? An example could be browsing a specific product on the website and as the customer pays in the retail store, a teaser for this product is shown on the point of sale.	20%			
Are you using business intelligence tools to analyze customer data, from both online and offline channels?	20%			
Are your KPIs integrating both online and offline outcomes?	10%			

Total Score

Appendix B: Descriptions of the Levels in the Sitecore Digital Maturity Model

Basic: In the Basic phase, objectives are based on establishing a core digital presence that consists of integrated Search, Newsletter and Web Analytics. Objectives are mostly related to serving visitors with information about the company and its services; all content is static and doesn't adapt to visitors' behavior.

KPIs in the Basic phase are typically traffic related, such as Visitors per Month, Page Views, Time on Site, etc.

Tactical: In the Tactical phase, businesses are beginning to tie KPIs to business objectives, such as increasing specific revenues or reducing costs. Here, digital channels are used strategically to achieve these goals. In terms of customer engagement, objectives are based on measuring quality rather than quantity and extending the multichannel presence, with mobile presence typically the first priority.

B2B businesses could also begin to use digital channels for sales enablement, where those channels are bringing qualified leads to the sales force.

Tactical activities include a transition from mass mailing to segmented email campaigns, to offer more relevant content to each recipient.

Optimizing: This phase focuses on optimizing the digital presence. This is typically accomplished through small, incremental iterations in which content is tested against outcomes, mainly to increase visitor engagement. Rules-based personalization is used, to make content more relevant according to visitor behavior, by using keywords or geolocation for specific served content.

Campaign management is used to optimize marketing spend, to determine where budgets are best spent to drive engaged visitors.

Automation: Automation plays a catalytic role in implementing and optimizing the business lead-to-revenue model, nurturing prospects with relevant content and information that is the context of the buying cycle stage they are in.

In this phase, email is used strategically, responding to behavior from a prospect. Visitor profiling is used to accumulate information about each prospect's behavior and interests, to be used in concert with the automation or as predictive personalization, responding to implicit onsite visitor behavior.

KPIs are often related to lead conversion, with revenue and lead-to-revenue time being the most important.

Engaging: This phase blends the online and offline worlds, integrating them to get a better, more complete overview of visitor behavior and enabling automation to react to changes that occur either off- or online. In this phase, universal visitor profiles are often built, enabled by close integration with the CRM system or customer databases.

Objectives in the Engage phase including acquiring sufficient intelligence about each customer to enable meaningful, relevant 1-to-1 dialog with each individual. In this 1-to-1 dialog, automation is key.

Appendix C: Overview Diagram of Sitecore Customer Engagement Platform Implementation Methodology

