

E-GUIDE

How to get the most out of **Sitecore's Personalization Tools**

April 2018

How to get the most out of Sitecore's Personalization tools

Most of you will have already heard about Personalization and how it is going to affect the digital landscape in 2018. Customized shopping experiences based on buying behavior, demographic categorization, customer psychology, content, and more are becoming part of the sales cycle through the concept of Personalization. For an E-commerce site, it means more meaningful engagement and stronger relationships with customers. For you as a business owner, this will ultimately lead to better conversion rates and increased revenue.

There are still many challenges when looking at Personalization and its presentation. It's a question of understanding and valuing the technology which simplifies the process. In its recently released version 9, Sitecore has placed strong emphasis on the potential benefits of the 'personal touch'. This E-Guide aims to give you an understanding of how Personalization works in Sitecore and what it can do for you.

The most important part is to plan for Personalization and decide how and where to get started. My experience with Personalization has been a mixed bag of joy and regret for a number of reasons, so I strongly suggest that people ask some simple questions before jumping on the bandwagon.

- What exactly can you do with Personalization?
- What do you need to consider when planning Personalization?
- How much time and effort is it going to take?
- How do I get started?

Personalization lets you keep up with evolving customer demands by delivering targeted content in real time and then making decisions based on trustworthy results. It's essentially a method for delivering targeted and relevant content to your site's visitors. The comparisons are based on user characteristics and behavior, for instance their location, implied goals, and previous visits.

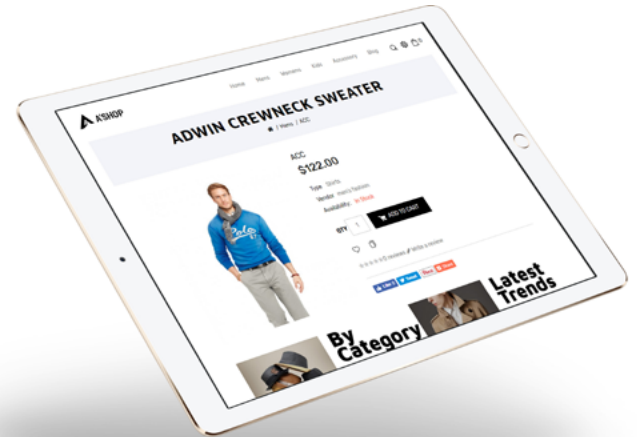
In this e-guide,
Hammad Ahmad,
a Program Manager at
Niteco, past Microsoft
MVP title holder and
Sitecore Specialist
delves into Sitecore's
Personalization Tools.
Turn the page to
discover more with us...



How Does Personalization Work

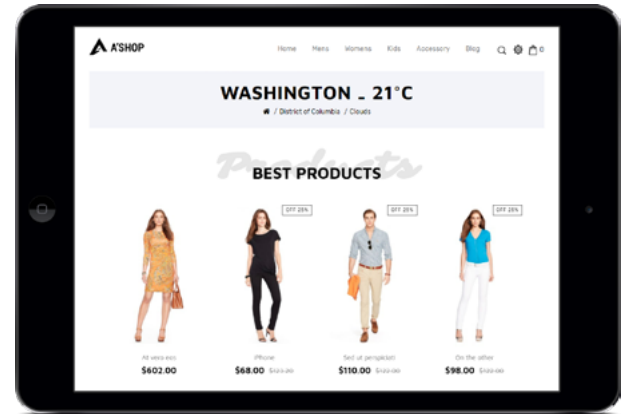
Let's look at a very basic example of how Personalization can ensure that the right content reaches the right people – for example by showing, hiding, or adjusting content on the website. For this example, we visit an online shop that sells men's and women's clothing.

FIRST VISIT: During our first visit, we can see a component asking us to either Log In or Register on the site. Below, we see both categories of clothing – women's and men's. We choose men's clothing, browse through some of the items, and close it.



SECOND VISIT: Returning to the site, we notice it shows men's clothing in the top component – due to our selection and browsing during our first visit. This is a small step towards personalizing people's experience based on their history and activities they have performed on the site. Just below this top offering, we can see components like 'Latest Additions' and 'Trending Now', which is a nice way to engage with us to show exciting content updates.

THIRD VISIT: During our third visit, the main component at the top changes to “Sign Up Today to Receive Discounts” and then gives us the option to login or sign up using our Google, Facebook, or Twitter account. Below, we once again see ‘Trending Now’ and the option to ‘Shop by Category’. It’s a call to action which is asking me to sign up so the site can have my contact details. We do sign up, browse once more, and then leave the site once more.



FOURTH VISIT: The site has now recognized us as a returning visitor and tracked our location. The main component is showing a weather update and asking us to shop for summer clothing. This time, we do buy some stuff and when we add it to our shopping basket, it shows a 25% discount on the items.

In this example, we are not complicating the user journey on the site or heavily personalizing stuff, but keeping it simple.

Identifying User Behavior

This can be achieved by categorizing it as Implicit or Explicit behavior.

IMPLICIT BEHAVIOR: Implicit behavior is, among other things, the following:

- o What Pages is the user viewing
- o What links do they click on
- o What path do they follow on the Site
- o What links attract them

This applies to anonymous users. Once we have all this info, we can map it against their Digital Maturity.

EXPLICIT BEHAVIOR: Explicit behavior is where we identify users based on actions they have taken on the site, filled-out surveys, or participation in a poll. This tells us, among other things:

- o What device they use
- o Their location
- o Keywords they have searched for
- o The number of Sessions
- o Whether they were referred from another Site

The above applies to logged-in or registered Users.

Personalization empowers a business to know every customer and shape their experience – in real time and at full scale.

Context Marketing

The way we actually work out how to personalize the logic is called Context Marketing. It is an approach to deliver measurable and relevant experiences. The result is improved performance, increased loyalty, and ultimately the establishment of new customer engagement channels.

Now, we all have a better understanding of how Personalization can be shaped and what benefits it can bring. Each customer interaction means something different and each touch point builds upon the next. The way we work on this is by Contextual Intelligence, which feeds our Marketing Automation. Contextual Intelligence is nothing new. It is the data you have gathered from your customer through your Content Management System, for example:

- Location
- Device usage
- Site Interactions
- Content preference
- Loyalty
- Purchases
- Social Profile

Once this is part of your CMS, you have the ability to manage the Digital Content itself, for example:

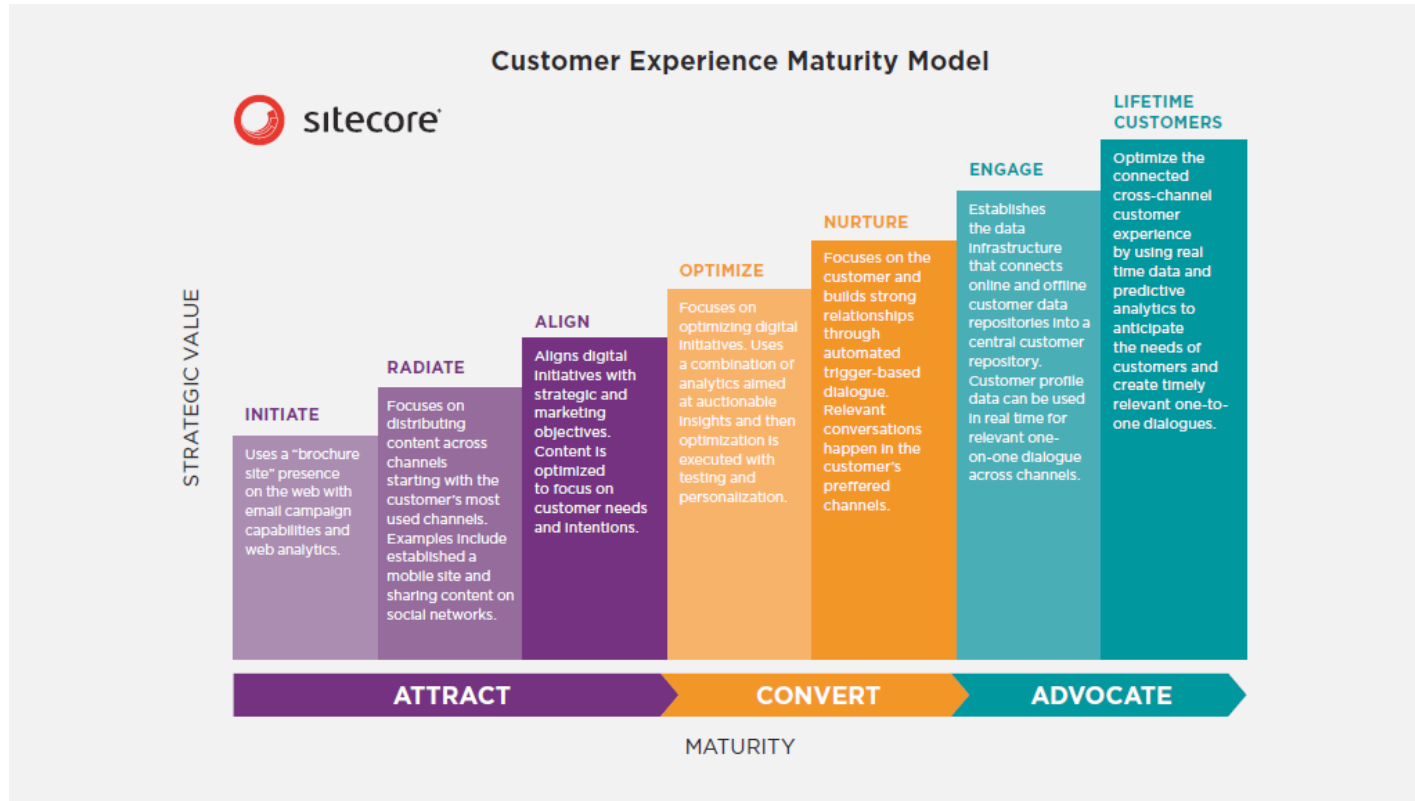
- Photos
- Articles
- Documents
- Videos
- Charts

Marketing Automation gives you the ability to deliver tailored content wherever your customer may be, regardless of device or browser, and to trigger certain events based on actions performed. This is an omni-channel approach, which means that you can orchestrate the customer experience across all channels in a seamless, integrated, and consistent way. This allows you to anticipate customers on one channel and then move to another as they progress.



To check your Digital Maturity Level

visit www.connecttheexperience.com



Challenges of Personalization

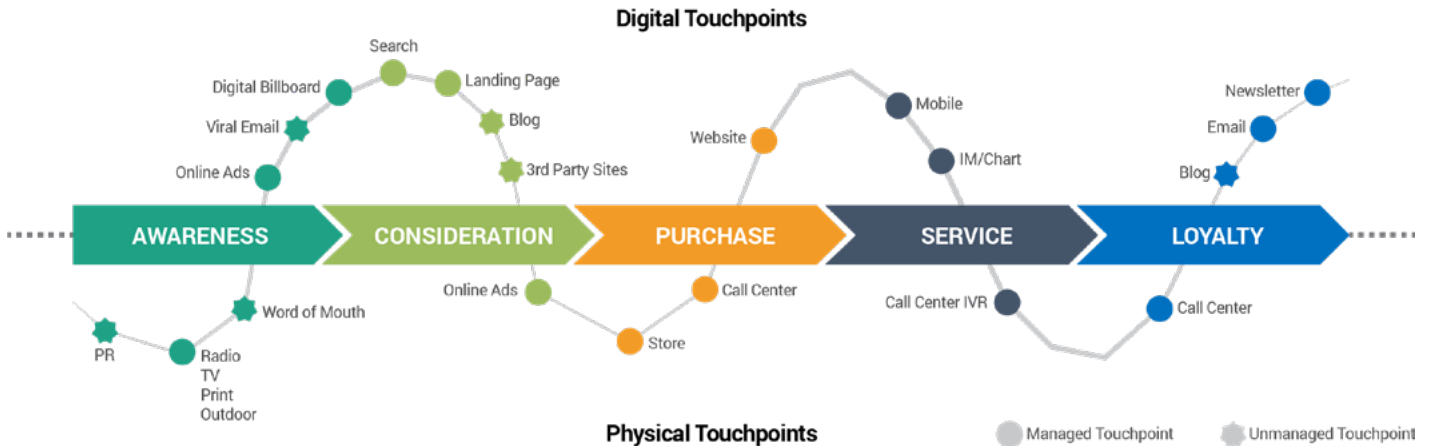
Personalization comes with its own array of challenges. These are not technical challenges, but stem from a Content Management perspective. Content generation is a huge task and incredibly time-consuming. Where previously, you just had one homepage catering to all of your visitors, once you implement Personalization, you need to have

multiple versions of your homepage catering to different customer needs and segments.

You should always see Personalization as a project within your website project, making sure you have multiple phases of implementing it. A lot of companies try to implement everything in one go.

This will not work and only serves to get people frustrated with the whole idea of personalized content.

Moreover, decisions taken within an organization are not made in straight lines. It's a complex cycle where you need to align your digital touchpoints with your physical touchpoints.





Why Sitecore?

Sitecore is a premium product and you need to make sure to get more out of it than 'just' a Content Management System. You do this through meaningful engagement with and Personalization for a segmented audience – giving them what they are looking for with the best possible customer experience. This will result in stronger relationships with your customers and improve your conversion rates.

Some of you may already use Sitecore but you haven't implemented any of these features. Or maybe you are thinking about using Sitecore and you're looking at the possibilities of what Personalization offers. Or maybe you're stuck in the middle of a personalization quagmire and want a strategy to move forward.

What Sitecore offers OOTB

Let's first look at what Sitecore offers out of the box in terms of achieving things that we might otherwise work on with code and other features. We often talk about pattern matching as the key feature. However, I feel that there are many more, relating not only to visitors, but also other contexts. I think some of these should be in the hands of the Content Editor. That way, they have more flexibility and opportunity on how to present an item without having to deal with code and system logic.

Dates:

- o Show options for a certain period of time. For example, if you want to run a promotion in February 2018, once the month changes, it will automatically end.
- o Show options for specific days of the week.

Item Information:

- o Include options for standard values and personalization based on fields in the item. For example, showing a survey poll on all pages where the check box is ticked.

Geographical location:

- o Content-based targeting, for example promotions and discounts for visitors from a specific location.

Pattern Cards:

- o Target content to an archetypical user.

Visits:

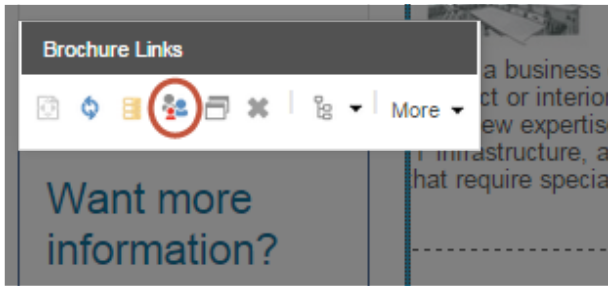
- o Target content to engage users who have already completed a Goal or Campaign.
- o Show advertisements to returning visitors or ask them to sign up for a mailing list.
- o Match users to a pattern.

Visitors:

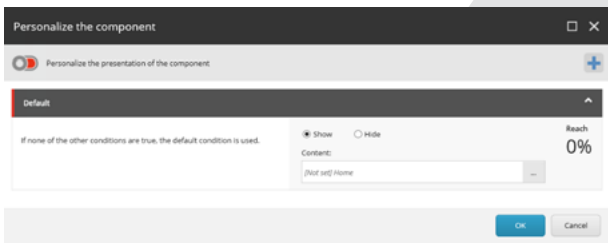
- o Re-engage users who have visited multiple times.
- o Target content through tags set in code. For example, specifying that the user has already registered for the newsletter so that advertisement isn't shown again.

Sitecore Personalization Rules

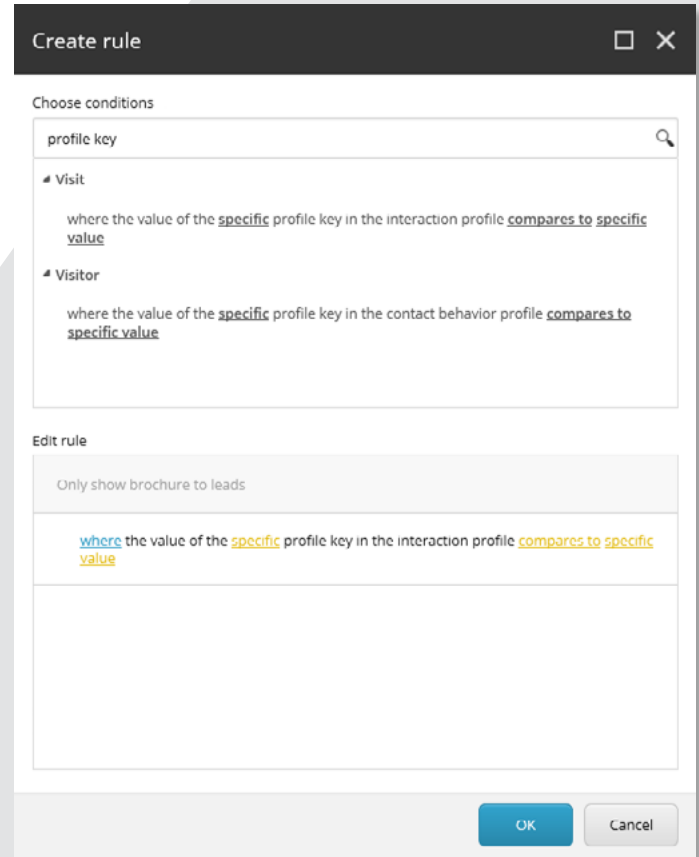
You can easily apply Personalization rules in Sitecore through Experience Editor. The screenshots below show you exactly how to do it.



To Personalize a Component



Add Personalization Rule



Create a Rule

Select the Associated Content

Select the content that you want to associate with the rendering and use as the data source.

Select an existing content item.

- sitecore
- Content
 - Email Campaign
 - Sample Newsletter
 - Experience Explorer
- Home
 - Standard-Items
 - RSS Feeds
 - About-Us
 - Services
 - Case Studies
 - News
 - Contact-Us
 - RSS-Foods
- Settings
- Layout
- Media Library
- Social
- System

Select Existing Content

Search for Content

Clone Current Content

Create New Content

Personalize the component

Personalize the presentation of the component

Only show brochure to leads

where the value of the Lead profile key in the interaction profile is greater than or equal to 50

Reach 0%
Effect = 0%

Presentation

Sample Rendering

Content

that will show

Default

If none of the other conditions are true, the default condition is used.

Show Hide

Reach 0%

OK Cancel

Brochure Links

Current Condition:

- Show only brochure to leads where the value of the Lead profile key is greater than or e...

Available Conditions:

- Show only brochure to leads
- Default

Edit Conditions

Want inform

Have a lo brochures

among the m also means c supports the

Although we have an exter and North Ar painters, plas

For a more comprehensive Rule Set sheet – download this file.....



Approaches to Personalization

Sitecore XP lets you choose from several Personalization approaches

Rules-based Personalization

You define the conditions under which content is delivered to a customer. For example, you can set rules based on the IP address or physical location of your visitors, the keywords they use to reach your site, their mobile device, or the goals that they achieve on your website to determine the content that is displayed. Remember that the Rule Editor deals with three main objects:

- Conditions
- Actions
- Rules

Adaptive Personalization

Use visitor profiles and pattern-card matching to dynamically adapt the content shown to visitors in real time. You can set adaptive Personalization rules in Sitecore XP's Rules Set Editor.

Historical Personalization

You can set rules that personalize content based on a contact's past behavior, rather than on their actions in the current session. After all, context is what comes before and after the present.

Test and then personalize

With Sitecore XP, you can use out of the box or manually configured A/B and multi-variant testing to assess your content and use the test results to optimize for conversion rates against your site's goals. You can also use testing to assess which type of content works best with certain segments of your visitors.

Journey-based Personalization

Design user journeys with Sitecore XP using advanced

business logic, using them to help assess where your customers are in their interaction with your brand. You can then use triggers to advance them through their journeys, depending on how far along they are.

All the tools and information you need to deliver contextual customer experiences are in one place with Sitecore XP. So there's no need to log into another system or learn another process. Personalize content in minutes for every customer, on every channel. Customize interactions from the very first anonymous visit based on third-party data, digital fingerprints, and in-session content consumption.

Sitecore Personalization Pre-Requisites

If you are on Sitecore Version 8 or above, you will have Experience Database (XDB) and Mongo Database enabled. This will allow you to collect the data and all the analytics behind the site's user experience. Please note that this needs to be enabled in order to gather these values as the user moves around the site, as well as to record the activity history in the user's profile. It will help you start the process of Personalization for the profile.

OMS/DMS/XDB needs to be enabled. If you plan to use Device Detection and Geo IP location. This carries limited extra cost.

Tools for Personalization

Campaign Creator:

This is a widget which allows you to create a unique ID for a campaign. This ID is what you put at the end of the URL if you run a Pay-Per-Click campaign. Sitecore can then track how many people are clicking and coming to the site.

Federated Experience Manager:

This allows you to create a beacon tag which can be inserted on a non-Sitecore website within Sitecore. You can track visitor interactions and generate analytics which you can then access in Sitecore. The best part is that you can inject personalized components on these third-party sites.

Learn and Optimize:

Most of us have seen Experience Analytics, which provides a dashboard of reports for marketers

to assess patterns, trends, and experience data. You should consider downloading a free add-on from the App Center called Experience Extractor which will allow you to extract all of this data and manipulate it, as Experience Editor does not allow editing or downloading.

Experience Profile:

This is used to monitor the behavior of contacts that have interacted with you through your website. It's like Analytics, but closer to the user. You can see specific goals triggered by a single user and this information can then be tied in with your customer relations management.

Path Analyzer:

This tool enables you to create a map which shows the sequential paths a contact takes as it navigates through your website.

A/B Testing and Multi-Variant Testing:

This allows you to test alternative combinations of a website and email marketing platform. It helps you to tailor content to find out which components or combination of components are most effective on your website. You can implement these to quickly evaluate your test results. The difference is that A/B testing runs two different variations, whereas multi-variant tests run with multiple combinations of components. For A/B testing, remember that you cannot login and run them as an Admin since workflows are involved. Sitecore also recommends that you have at least 3130 unique visitors over a 90-day period to get the most out of it.

Content Architecture – Habitat / Helix

The architecture of the site needs to be built in line with Sitecore Best Practices, which means Habitat or Helix. It means that you will be building a site out of components, so you can easily play around with the properties of a component according to your Personalization needs. Do remember that content sources need to exist to be able to personalize components in order for goals to be implemented. Your profile personas

and pattern cards must also be implemented.

If you are wondering whether you can use component Personalization rules without xDB being enabled, the answer is: Yes. For example, if you have to hide a component depending on the current date. If you have a xDB license and don't want the database tracking, then it's very simple. You need to set the following:

Xdb.Enabled set to false
Xdb.Tracking.Enabled set to true

That will disable Xdb, but still allow the Personalization rules to run on renderings. Note that this applies to 8.1 and above only. In 8.0, you would have to keep Xdb.Enabled set to true and remove the MongoDB connection strings. It will generate a lot of errors in the logs & is not a supported way of running things. But it does work.



Sitecore Personalization Strategy

A Personalized World

In a world of digital experiences, one question is extremely important: “What shapes our experiences?” A myriad of new things are happening as we become more connected. As today’s digitally-connected customer experiences technology on a daily basis now, changes become tantamount. Technology is creating the context – not only shaping it – and enabling us to interact as connected people.

Working with personalization is essential in order for a business to detect the behavior and actions of customers and to provide relevant offerings that will enable their purchasing decisions. It’s a long journey that should be done in phases as your business matures and you get to know your customers. I believe I have highlighted all the key points to set you on a path to working with personalization in Sitecore. With these insights, you can enhance your customers’ experience and as a result see your business grow.

POWERING YOUR **SITECORE** AMBITION

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