

A Marketer's Guide to the Sitecore DMS

A non-technical review of Sitecore's digital marketing platform

[nonlinear digital](#) is the full-service digital agency division of nonlinear creations, with extensive knowledge and technical expertise in various CMS and marketing/analytics solutions, particularly the Sitecore platform. Our teams, working with you, use an agile methodology to create unique website and digital experiences that drive business results in a measurable way.

For more information on our services or to get in touch, please visit:

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Introduction

One of the more fascinating developments in digital marketing of late has been the emergence of Customer Experience Management (CXM) or Web Engagement Management (WEM) as an integrated way of thinking about your digital efforts. A key component of this approach is the creation of a customer journey map - a visualization of every touchpoint you have with your customers - and centrally managing those interactions with the goal of ensuring a personalized and relevant experience throughout the lifecycle of your relationship with them.

By bundling its Digital Marketing System (DMS) with its flagship web content management offering (CMS) under the umbrella of the Customer Engagement Platform (CEP), Sitecore has joined a small number of commercial web CMS vendors who have crossed over into the parallel class of multi-channel marketing platforms that are powering CXM strategies. Indeed, the most recent Gartner Magic Quadrant for the multi-channel campaign management space had Sitecore ranked as visionaries for the second-straight year in addition to its more traditional placement among the leaders in the web content management space.

That being said, the DMS' features aren't necessarily new to savvy web marketers. What is new, however, is the ability to access some best practice digital marketing tactics and techniques directly from your web content management system. Not only does this create something of a one-stop shop - a fairly significant evolution in its own right - it has the added benefit of driving your marketing from the same system that controls your content.

This development is of particular interest to two groups of marketers in particular:

1. Marketers in companies that already use Sitecore to power their website
2. Marketers in companies that are preparing to redo or invest heavily in their website or overall digital technology suite

This whitepaper explores the various CXM-related tactics that are enabled by the Sitecore DMS and goes into detail on which tactics are most useful in several common business scenarios. We also look at limitations and special considerations associated with them, concluding with an in-depth scenario that walks through a logical rollout of the DMS in a common business application.

For more information on an approach to CXM style digital marketing through your CMS that's more technology agnostic, check out our whitepaper:

8 Steps for Driving Success With Web Engagement Management / Customer Experience Management
<http://www.nonlinearcreations.com/Whitepapers/8-Steps-for-Driving-Success-with-Web-Engagement-Management.aspx>

Marketing tactics enabled by the Sitecore DMS

For the most part, the potential of the tactics enabled by the Sitecore DMS will be familiar to experienced digital marketing professionals. But equally familiar will be the frustrating obstacles to delivering on this potential. Sitecore DMS removes technical and usability barriers and allows marketers to execute otherwise challenging but relatively common tactics effectively.

What's less familiar, however, is the idea of engagement value. Engagement value is the most significant innovation delivered by the Sitecore DMS. It provides marketers with a means of assessing the value of a visitor to the site when that visit does not include traditional conversion activity – a gap in the traditional understanding of web visit value. When a visitor that views content scored by marketers as valuable, their engagement value increases. There are limitations to its effectiveness, as discussed later on, but this ability to associate value even without a hard conversion provides a major opportunity to marketers equipped to take advantage of it.

Overall, the tactics that are enabled by the DMS vary in the complexity of their implementation and in the value they deliver to specific business models. These quick definitions of each tactic are followed later in this paper by a detailed discussion of their advantages, disadvantages, time to value and suitability for various marketing challenges:

- ~ **Engagement value** – a means of scoring a visit based on the visitor's level of trust and commitment, based on the content they view and the actions they take. The engagement value allows marketers to assign relative engagement values to touchpoints on the website, reflective of their importance to website goals. For example, a pricing quote request may be assigned a higher engagement value than a specific page view.
- ~ **Visitor profiles** – site visitors can be segmented into pre-defined visitor profiles that build as the visitor browses and interacts with the website, based on the content they view and the actions they take.
- ~ **A/B and Multivariate testing** – by serving different versions of an element of a site randomly to visitors, marketers can easily test the effectiveness of a content element in convincing visitors to perform a desired action. By default, these tests evaluate content against the resulting engagement value of visitors.
- ~ **Rules-based implicit personalization** – the ability to target content to anonymous visitors through relatively simple rules based on known visitor information, including their location, the keywords that brought them to the site and the number of times they have visited the site (see the appendix for more information on available personalization rules).
- ~ **Persona or profile-based implicit personalization** – marketers have the ability to target content to visitors based on the "category" into which they've been placed as part of the visitor profiles described above. This is how the passive visitor profiles actively interact with anonymous visitors.

- ~ **Explicit personalization** - this refers to the ability to personalize against profile attributes of a known or logged-in user.
- ~ **Engagement plans** - these allow marketers to script an ongoing conversation with prospects or clients after they've identified themselves. This is primarily done by scripting a series of timed emails but Sitecore DMS also allows you to target and personalize content on the site based on their "position" in an engagement plan.
- ~ **Lead scoring** - using either engagement value or by crafting clever visitor profiles, it is possible to score the value of leads the site generates. Ideally, this allows marketing to hand leads to sales only when they are ready to purchase.
- ~ **Sales enablement** - a direct sales team will be very interested in understanding who is visiting the site, particularly if they are visiting from IP addresses connected to companies that are already in their pipeline. Automatically feeding a visitor's profile and browsing behaviour into a CRM system makes it accessible on demand.

Picking the right mix of tools

While the DMS' mix of tools and tactics may seem, at first, like something of a windfall for digital marketers, real-world experience has shown us that it can be hard to know just where to start. Figuring out an approach to rolling out some of these features is the first step in using the platform successfully.

Generally speaking, the tactics outlined below break down into two broad categories: quick win or short time-to-value tactics and longer term, more complex tactics. The latter category typically takes longer to show value given the nature of the task, or it depends on other foundational activities taking place, such as a robust integration with your existing CRM or the clear definition of site-specific personas or visitor profile cards (a non-profit that has already done the work to integrate their membership database system with their web content management system could take advantage of explicit personalization right away, for example, making it a much faster task to implement).

| Quick win / Short time to value | Longer term / longer time to value |
|---|--|
| <ul style="list-style-type: none"> ~ Rules based implicit personalization ~ A B testing ~ Engagement plans | <ul style="list-style-type: none"> ~ Profile-based implicit personalization ~ Explicit personalization ~ Sales enablement ~ Lead scoring ~ Engagement value |

Once you have evaluated the tactics based on their ease of implementation and time to value characteristics, the next step is to consider the relevance for your specific marketing scenarios. For the purposes of illustration, we've classified three different types of scenario:

- ~ Companies or organizations with a short online conversion cycle (selling books or making restaurant reservations, for example)
- ~ Companies or organizations with a longer, more considered conversion cycle (large B2B purchases, car sales or selecting an MBA program, for example)
- ~ Companies or organizations with a more relationship-focused, repeat conversion cycle (association memberships, subscriptions or large-volume corporate accounts, for example)

Not surprisingly, the quick win / short time to value tactics generally align best with the shorter sales cycle, while the more complex tactics tend to be of the most value where there are longer conversion cycles. This is in large part because the longer cycle conversions tend to benefit the most from the sort of foundational activities referenced above - integration with existing database systems (CRMs, AMSs etc.) and the creation and configuration of visitor profiles.

| Short sales cycle | Considered sales cycle | Repeat purchase |
|---|--|--|
| <ul style="list-style-type: none">~ A B testing~ Rules-based anonymous personalization | <ul style="list-style-type: none">~ Engagement Value~ Engagement plan~ Persona-based anonymous personalization~ Sales enablement~ Lead scoring | <ul style="list-style-type: none">~ Explicit CRM-driven personalization~ Engagement plan~ Sales engagement |

Limitations, workarounds and other cautionary tales

A quick note for existing Sitecore customers

Depending on the version of Sitecore you're using and/or the nature of your license, you may already have access to Sitecore DMS. However, in our experience, not every site has been architected to take advantage of DMS' features.

The simplest example of this is found in the DMS' ability to personalize and test elements of your site. If your site has been built with rigid page templates, it may be impossible to test or personalize discrete elements on the page.

For example, if your headlines are part of your main content block, rather than a standalone element, you wouldn't be able to test just the headline. **nonlinear offers a DMS readiness assessment** for organizations that want to know if their site is ready to take advantage of this platform.

Contact us at sitecore@nonlinearcreations.com to learn more.

While the tactics that the DMS can enable are potentially powerful, our experience with them has brought about a few limitations – some very logical, some befuddling. The good news is, in most cases, we've been able to find relatively straightforward workarounds.

The table that begins on the following page looks in detail at each tactic discussed in this paper and provides both limitations and possible workarounds.

| Tactic or Capability | Limitation or note of caution | Workaround |
|--------------------------------|--|---|
| <p>Engagement value</p> | <p>The accuracy of engagement value calculations is driven entirely by the accuracy with which content is weighted as a step in the sales cycle.</p> <ul style="list-style-type: none"> ~ If every page on the site generated an engagement value of 1, then you are essentially measuring page views ~ If only conversion events are given engagement values, then you replicate goals reporting available in traditional analytics solutions such as Google Analytics. <p>The key challenge, then, is accurately weighing the value of content that lies between these two scenarios.</p> <p>Also, as it stands now, you can only have one engagement value metric. If you have multiple, independent business processes – products where the buyers don't overlap, for example – you would ideally have one engagement value for each business process. This isn't currently possible in the DMS.</p> | <p>The content weighting issue is a real challenge. For some clients it will be very clear. For others, not at all.</p> <p>In an ideal world, machine-learning techniques could determine which content is most important by comparing large sets of those who convert to those who do not, but this won't happen in the foreseeable future. Manually doing this sort of analysis is possible but getting a large enough sample size to ensure statistical relevance is likely too labour intensive to make the effort worthwhile.</p> <p>As for the issue of having only one engagement value metric? This is more of a nuisance than a true limitation; visitor profiles specifically for lead scoring can be used instead.</p> |
| <p>A/B testing</p> | <p>Out of the box, Sitecore evaluates A/B tests against engagement value (see below), rather than strict conversions like most testing solutions. In most cases, though, the need will be to evaluate against a specific outcome – say whitepaper conversion or product purchase.</p> <p>Unlike Google Content Experiments (formerly Google Website Optimizer), Sitecore does not report on statistical validity of the test. This needs to be calculated manually.</p> | <p>If engagement values have not been applied broadly to the site, you can run an A/B test and set the engagement value of the outcome to 100. In the absence of other engagement values, this equates to a test of this one outcome.</p> |

| Tactic or Capability | Limitation or note of caution | Workaround |
|---|--|---|
| Implicit personalization (rule-based) | Sitecore does not allow you to easily evaluate the effectiveness of the personalization rule - you don't know if it increases visit value unless there's a conversion or goal tied directly to the personalized element. | We are still working this one through. We have a few ideas but nothing that's proven to be a 100% winner. Yet. |
| Visitor profiles | <p>Out of the box, profiles don't persist across multiple visits. While this was a decision made for the purposes of not overwhelming the database and causing performance issues, this robs profiles of much of their value.</p> <p>Profiles only matter to the extent that they can be differentiated based on the content that exists on the site - often there is no way to disentangle personas based on their interaction with existing content.</p> | <p>We've found ways of having profiles persist but they require coding.</p> <p>You can create content specifically to allow personas to be differentiated or accept limitations of current content for profiling.</p> |
| Implicit personalization (Persona- or Profile-based) | <p>If the information architecture of a site is designed around the most useful audience types and audiences tend to stick to their own sections of the site, then profiling adds very little to our knowledge or capabilities.</p> <p>For example, if a car company were to structure its site by buyer type (fuel-conscious urban family; recreational sports car enthusiast etc.) the ability to profile users against these personas and personalize content is largely moot; they are already seeing the information tailored to their needs.</p> | This is a limitation based on the site's information structure (a structure which could be otherwise perfectly valid, it should be noted). No real workaround opportunities here. |
| Explicit personalization | This requires a known visitor with specific attributes - either gathered during the Sitecore visit, stored in a Sitecore user or as part of a CRM integration. This ranges from out-of-the-box to a custom integration effort. | n/a |

| Tactic or Capability | Limitation or note of caution | Workaround |
|-------------------------|--|---|
| Engagement plans | It requires content to be effective - emails need to deliver value. | n/a |
| Lead scoring | <p>Lead scoring is not identical to engagement value. The differences:</p> <ul style="list-style-type: none"> ~ Lead scoring is implemented as a separate profile/persona ~ You can have multiple lead scoring personas/profiles (you can only have one engagement value) ~ Every visitor triggers engagement values; lead score is only relevant to those that self-identify by taking certain actions <p>Also - the more fundamental constraint is that sales and marketing must agree on a model for lead scoring. And then the site must have content or interactions that allow a score within that model to be generated.</p> | Use the engagement value. |
| Sales enablement | <p>It requires integration with a CRM system (this can vary from relatively easy to very difficult).</p> <p>You must be selective in the information you send to the CRM - it needs to be validated as useful by sales prior to finalization.</p> | <p>Where clients have a list of "named accounts," personalization rules can be built specific to these clients. These rules can cause specific content to be shown and/or can record the visit as a unique event. This record can be accessed by sales without CRM integration.</p> |

Example

nonlinear digital has undertaken Sitecore DMS projects with a number of clients but given the nature of the work providing specific case studies is limited by the need for client confidentiality. Instead, we've provided a hypothetical case study to help translate some of the concepts explored above into a tangible example. This is, in essence, a composite of a handful of projects.

Composite case study: Lenny Software

The task

Ellen de Bruin, Director of Marketing at Lenny Software, was tasked with stepping up efforts to find more enterprise license customers for its flagship process management software package. A market leader in Southwestern Ontario, Lenny Software was eager to expand its reach - across the country and around the world. As a secondary goal, Ellen was charged with increasing awareness of Lenny's smaller off-the-shelf applications, which the CEO viewed as a largely untapped opportunity for the company to increase its revenues.

Determining the approach

Lenny Software had recently redesigned its website using Sitecore as the platform. Ellen thought it looked modern and inviting but she wasn't sure the company was fully exploiting the digital channel in terms of targeting specific market segments. She decided to explore some of the targeted marketing options made available by Sitecore's DMS.

Identifying specific goals

Ellen developed a list of specific goals that could easily be translated into a DMS plan of action. In no particular order, they were:

1. Increase the number of inquiries to the enterprise sales team from Canadian companies outside of the Southwestern Ontario region;
2. Increase the number of e-mails sent to local resellers (highlighted on the website) by prospects originating from India and China - two targeted markets for growth;
3. Increase the number of sales quote requests for the enterprise product and online purchases of the off-the-shelf apps
4. Increase the time on site of all visitors - and, in particular, visitors from India and China; and
5. Promote continued dialogue with off-the-shelf app customers, who Ellen believed could be upsold under the right conditions.

Developing and executing a short-term plan of action

Ellen identified goals #2 and #5 as quick wins with short time to value and prioritized those goals. She also decided to run a series of A/B tests via the DMS to determine if changing the appearance of certain calls to action would have an impact on goals #1 and #3.

Starting with goal #2, Ellen configured a few simple rules. Specifically, the rules dictated that, if a lead identified as originating from India or China were to visit the reseller page, Indian and Chinese resellers would surface before others.

As well, thought leadership blog posts and videos on “localizing your process management software” and “process management in the Indian (or Chinese) market” would be advertised.

Moving on to goal #5, Ellen developed an e-mail drip-marketing campaign – a series of e-mails for registered off-the-shelf app owners that would be automatically sent by the DMS at designated intervals. Finally, Ellen designed ten A/B tests, experimenting with the size, text, colour and placement of the current call-to-action buttons “Request a Sales Quote” and “Contact a Representative Now.”

Short-term results

After a month, Ellen concluded that larger buttons were more successful than smaller ones, green ones were more successful than blue ones and changes to the text and placement of buttons had little to no impact on conversion rates. They also received a fair number of e-mails from customers in response to their drip-marketing campaign – a few of which asked to be removed from the mailing list but the large majority of which were positive in tone, providing feedback on the applications they were using.

Meanwhile, time on site of Chinese and Indian visitors doubled, and calls and e-mails to the enterprise sales team increased fourfold.

Developing and executing a long-term plan of action

Ellen viewed the goal of “increasing the time on site of all visitors” as one for the longer term. To do this right, she needed to develop personas and employ profile-based implicit personalization. It was a challenging exercise. The site was already designed in a way that segmented users into buyer types: enterprise platform customers, off-the-shelf app customers etc. Ellen knew that the best way to keep visitors on site would be to personalize the content being viewed by those visitors, but how could they cut across audiences so that content could be micro-targeted?

Ellen had an idea. What if they developed personas by “vertical” area, for example, by engineering or IT or supply chain management? Then they could surface content related to those themes, such as the latest case studies from those verticals.

Once they decided on the types of personas to develop, Ellen determined the pattern of behaviour that would define a site visitor as one persona or another. Finally, they decided what content to surface to make the experience of those visitors feel personalized. It was a lot of work, but over the course of a year, time spent on site tripled, and requests for quotes and online purchases of software were up substantially for the first time in five years.

Conclusions and Next Steps

Ellen was able to meet all of her original goals, most after only a few months. Next steps include integrating the DMS with the CRM and developing a system to score the engagement of online visitors in order to support future sales efforts. Ellen also plans to continue testing other calls to action on the site to improve conversions.

A Final consideration

As various product categories - web content management, marketing automation, analytics etc - have started to overlap, a parallel debate has emerged. Are organizations better off investing in one platform that performs the majority of functions very well? Or should they invest in a series of best-of-breed single-function solutions and rely on potentially complex system integrations and tie-ins. There is, of course, no single answer. It all depends on an organization's unique needs, budget and priorities.

For organizations that prefer using a single system or don't want to invest in complex integration and for organizations that have put a priority on digital content, we believe that Sitecore offers the "best of need" platform. With its origins as a content delivery solution, Sitecore enters the newly emerging market from a position of strength. Each iteration of its marketing tools - the Email Campaign Manager and the Digital Marketing System, to name just two - delivers better functionality and, when needed, integration with more mature platforms remains possible thanks to its .NET infrastructure. Sitecore also offers a range of connectors for those organizations that do have other systems in place such as Salesforce or Dynamics CRMs.

For savvy digital marketers who want to apply best practice tactics in a measurable way, Sitecore offers a powerful suite of tools. And as an official Sitecore partner with a long track record of successful deployments, we are well equipped to help organizations get the most out of their Sitecore investment. From our Readiness Assessment offering to our DMS Acceleration Service, we can get your Sitecore site and your web team ready to start taking advantage of these new tools quickly and effectively.

To get started on your Sitecore DMS / CXM journey, contact us today:

cxm@nonlinearcreations.com

Appendix:

Personalization dimensions

One of the strongest and most powerful components of the Sitecore DMS is the Rules Engine, which allows sophisticated personalization clauses to be built in the manner of Outlook filtering rules to display and hide variations of content. Individual rules can be combined into And/Or logic clauses, allowing a large degree of precision in targeting content and in optimizing the site towards a user's intentions, and even in driving other aspects of website logic.

There are multiple clauses available to build personalization rules. It is helpful to think of them in these broad categories, each with a few examples.

Rules-based implicit personalization - based on known attributes on anonymous visitors

- ~ Geographical information (city, country, zip/postal code, business name, region)
- ~ Referrer information (search keyword, traffic type)
- ~ Visit information (visit number, page visited)

Profile-based implicit personalization - based on visitor behaviour and intention

- ~ Engagement plan state
- ~ Trigger of a specific goal or event on the website, such as a conversion point
- ~ Matching to a particular profile or persona
- ~ Engagement value points
- ~ Trigger of a campaign in the current visit

Explicit personalization - based on attributes of a known visitor

- ~ Specific fields in the Sitecore user profile, including name, email and custom fields

Personalization based on website context

- ~ Current website name
- ~ Current domain name
- ~ Current language
- ~ Current device

About nonlinear

Who is nonlinear digital?

nonlinear digital is the full-service digital agency division of nonlinear creations. With offices across Canada, the USA and Brazil, Nonlinear has a track record of successfully planning, executing and measuring the effectiveness of digital marketing and outreach solutions for a range of clients.

What does nonlinear digital do?

We write digital strategy. We build eye-catching websites and we do it with a technical proficiency that is second to none. We help organize your digital team and educate your stakeholders. We help you extract meaning from data so you know if you're really driving business value from your investment.

We are a full-service digital agency with extensive knowledge and technical expertise in various CMS and marketing/analytics solutions. Our teams, working with you, use an agile methodology to create unique website and digital experiences that drive business results in a measurable way.

What makes nonlinear different?

We put business first. After almost 20 years in the game, we have seen technologies and trends come and go. What has remained constant, however, is the need to drive tangible business outcomes from your digital spend. Today our focus is on creating an engaging online presence that:

- ~ serves your customers' needs by being memorable, relevant and increasingly personalized and accessible on any device
- ~ serves your business' needs by generating meaningful data from which you can extract real insights and metrics tied to your business goals

Contact us today

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