

Getting started with Sitefinity Insights (DEC)

Learn the basics and develop your own
Optimisation & Personalisation strategy



Agenda

INTRODUCTIONS (5 Mins)

Attendees, Roles and Responsibilities



SITEFINITY INSIGHTS: AN OVERVIEW & BRIEF DEMO (25 mins)

UNDERSTANDING YOUR OBJECTIVES (45 mins)

Overview of the industry landscape, your business and your objectives.

-- BREAK (15 mins) --

DEEP DIVE: AN APPROACH TO IMPLEMENTATION

The four steps to understanding and personalising customer interactions across channels with Sitefinity Insights

STEP 1: ENABLEMENT (60 Mins)

We will learn how to evaluate your current compliance situation across channels and how to enable Sitefinity Insights data collection.

STEP 2: DEFINITION (60 Mins)

We will establish your business goals and marketing requirements.

-- BREAK (15 mins) --

STEP 3: IMPLEMENTATION (60 Mins)

We demonstrate how you can move from strategy into implementation by defining your own conversion, touchpoints and key audiences.

STEP 4: TEST & LEARN (30 MINS)

Taking your learning further; how to deliver tailored content, products and services to each and every customer

COURSE REVIEW & NEXT STEPS (5 Mins)



Sitefinity Insights: An Overview

What is it and the benefits for your business.

Sitefinity Insights (formerly Digital Experience Cloud) enables marketing, sales and business analysis teams to track user behavior across channels, visualise data, and profile the customer audience to deliver better marketing campaigns, personalise the customer experience, create more impactful content and better contribute to commercial business objectives. With the DEC, your investment in the Sitefinity CMS is transformed into a fully-fledged Digital Experience Platform (DXP).

This training session aims to deliver a business focused set of activities, designed to ensure your key business functions understand the capabilities and potential of the DXP and maximise existing digital channels to deliver a world-class customer experience.

The business imperatives

- Facilitate a personalised omni-channel marketing strategy.
- Gather insight into customer behaviours, journeys and struggles.
- Provide the ability to address audiences differently, engaging with customers on a more personal and emotional level
- Maximise the existing investment in Progress technology.

What are we going to do?

Our training session delivers business-focused activities that ensure your team understands the capabilities of the Digital Experience Cloud. Together we'll maximise the use of digital channels to deliver a world-class, personalised customer experience, moving Sitefinity from a CMS to a Digital Experience Platform.

Anticipated Outcomes



A deeper understanding of your current and potential audiences and their behaviours.



Reach and engage with your customers across all touchpoints.



Continuously capture and interpret data to maximise lead generation.

Let's take a look at some examples...



Deep Dive: Approach to implementation



The four steps to understanding and personalising customer interactions across channels with **Sitefinity Insights**



UNCOVER THE TRUTH

Align key stakeholders, develop project KPIs, collect, collate and analyse data. Study the current situation across channels to establish a baseline.

CHART THE COURSE

Develop personas, provide a visual narrative of the customer journeys and design a solution that meets business objectives.

SET THE FOUNDATIONS

Implement the strategy by defining personas, journeys and lead scoring funnels into DEC. Define the set KPIs as conversions. Make personalised experiences a reality.

INSIGHTS TO ACTIONS

Scale up the activities and engage with customers across all touchpoints with a relevant message. Set a “test and learn” approach to measure the impact of personalisation.

ENABLEMENT

DEFINITION

IMPLEMENTATION

TEST & LEARN

Enablement



Learn how to evaluate your current compliance situation across channels and how to enable Sitefinity Insights data collection.

Activities

- 1. Privacy policy discussion**
Build an understanding of applicable privacy law principles, ensuring the compliance of your tracking and personalisation activities.
- 2. Consent Notice implementation**
What changes are required to the Privacy policy or Cookie Consent Notice prior to connecting your website to Sitefinity Insights.
- 3. Tag rules**
Taking advantage of Sitefinity's GDPR toolkit, we will show you how suppress any tracking for users who haven't explicitly opted-in - suppressing data collection where consent is not given or withdrawn.
- 4. Data center(s) setup**
We will show you how to configure Sitefinity Insight data centres and data sources.
- 5. Sitefinity Insights enablement and testing**
Demonstration on how to enable the connector for Sitefinity Insights (formerly Digital Experience Cloud) in Sitefinity modules.
- 6. Audit of existing systems, data providers and analytics**
Evaluate necessary/beneficial integrations with existing martech and ensure that Sitefinity Insights utilises and feeds all relevant data sources. We'll also look at your organisation's readiness to implement Sitefinity's personalisation capabilities

Definition —



Establish business goals and marketing requirements. Understand personas and customer journeys. Devise a strategy and design a solution that meets business objectives and delivers on KPIs.

Activities

1. Define objectives

Uncover core business requirements, understand barriers, define the audiences and develop a roadmap for success.

2. Defining Personas

How to use improve your understanding of current and aspirational audiences and develop customer personas for Sitefinity Insights.

3. Customer Journey Mapping

How to map your customer journeys across different channels and perform a detailed, forensic User Experience (UX) review.

3. CX/Personalisation Strategy

How to design effective experiences tailored to each persona or segment, and plan content which matches user context.

4. How to develop a data plan

Planning is essential in ensuring that Sitefinity Insights is fully integrated with your business applications and meets analytics and personalisation objectives. We show you how to develop a tracking plan, pinpointing the key configuration components and the data that will be collected and utilised – essential to maintaining compliance.

Implementation



Learn how to execute the strategy and tracking plan. Specify your personalisation approach, define touchpoints and interactions that track and optimise the unfolding relationships with your customer.

Activities

- 1. External data integration**
How and why you can enrich Sitefinity Insight's capabilities using custom integrations to existing data within your organisation.
- 2. Personas and rules definition**
How to setup your audience segments and personas within Sitefinity Insights. Create rules to monitor touch-points across channels and identify visitor-types from their behaviours.
- 3. Lead-scoring and the sales funnel**
How to implement lead-scoring models, identify leads and measure their readiness to convert.
- 4. Defining conversions**
Learn how to define and track conversions and analyse user behaviour. Identify and understand key touch-points contributing to conversion.
- 5. A/B Testing**
Learn when and how to use Sitefinity Insight's A/B testing functionality to to optimise your content and calls-to-action and improve conversion rates. Learn how to assess what content works best with certain audience segments and where your website or application presents a struggle or a barrier.
- 6. Personalisation – approach and setup**
Learn how to choose the best personalisation approach for you;. Rules-based, Adaptive, Historic interaction, Journey-based or mixed?.

Test & Learn



Learn how to deliver tailored content, products and services to each and every customer exactly when they need it. Adopt an agile approach to continuous improvement of the customer experience.

Activities

1. Journey Optimisation

Understand how to obtain and react to ongoing insights and maintain continuous development/improvement of a fully-fledged personalisation strategy.

Learn how Customer Struggle Analysis can be integrated with your Sitefinity Insights solution, adding richness to your digital intelligence.

2. Scaling-up Personalisation

Learn techniques to help scale your personalisation initiative to include more segments, more touchpoints and channels, adopting predictive analytics to achieve a customer journey that is unique for each persona.

