



THE POWER OF PERSONALIZATION WITH SITECORE

A STEP-BY-STEP GUIDE
TO PERSONALIZATION WITH SITECORE

Personalization

Targeting and personalization are consistently top-of-mind for digital marketers. This is not without reason. By most industry estimates, advancing your user experience personalization maturity can result in a conservative 19% boost in conversion.¹

While personalization isn't new to marketing strategy, it has only recently become the main focus of digital marketers. Content creation continues to be king, but marketers are now taking a closer look at how to make content more relevant and customized for individual targets. Web design, messaging, and calls to action are now created with the individual customer experience and the customer's preferences and needs in mind.¹

According to an Econsultancy poll, 30% of marketers say targeting and personalization are their number one priority.¹

Gartner's Magic Quadrant for Web Content Management



Technology, however, can be a big barrier to a successful personalization strategy. According to a Demand Metric survey, 59% of marketers said they do not personalize content because they do not have the right technology to do so.² There are many customer experience platforms (CXP) and business solutions for personalization, but choosing the correct technology for your organization depends on many factors, including your goals and strategy.

This paper focuses on Sitecore Gartner's top pick for enterprise level CXPs: Sitecore. Sitecore has received top ratings for its personalization and behavioral profiling abilities – a big focus for marketers when it comes to their digital customer experience solution. Sitecore has evolved from its origin as a content management platform (CMS) to its current version, Sitecore 8.2, which will be used to illustrate the white paper.

Prerequisites to Personalization

To reach to a mature level of personalization on Sitecore, there are some up-front requirements:

- Sitecore 8.0-8.2 (ideally 8.1 or above) CXP
- MongoDB to drive the Sitecore Experience Database (xDB)
- The technical bandwidth to handle large workloads
- A solution like Habitat/Helix or Sitecore Ignition to provide a component-based authoring environment
- Top-down company buy-in for an enterprise-class solution and the team to support it

Start with Strategy

Marketer Preparations

To drive personalization in Sitecore, you first need to build a strategy. This will pay off in the long run. As with other solutions, you need to provide the CXP with the nuts and bolts to drive the experience.

The good news is that with Sitecore you do not have to tag every page with a line of code, because it is built from the ground up as one cohesive solution that contains your content, marketing, and analytics.

There are some high-level strategic elements that all stakeholders should discuss and put into place:

1. **Goals** that act as triggers based on users hitting a page or a specific action (such as a button click)
2. **Engagement value scoring** that improves analytics by driving reporting that is relevant to your business and can further drive personalization
3. **Campaigns** that tie multi-channel (on- and off-line) activity to user activity over sessions on your site and back to the campaign
4. **Marketing taxonomy** that, simply put, is a set of tags that you can define and apply to goals, campaigns, assets, and so on. These also provide deeper insight in Sitecore Analytics and can drive personalization.

Plan the Strategy

With all prerequisites in place, you can start to dive into personalization. In Sitecore, personalization will be driven by both explicit and implicit behavior. Out of the box, you have the ability to build a unique customer journey through both rules and behavior-based personalization. Keep in mind that you will want to properly plan and document the personalization strategy, from a high-level strategic standpoint to a detailed tracking of content, as it relates to personalization. It is best to start simple. What may have already been a long process to get content created for a single page will grow exponentially as you build an ever-evolving set of unique, rule-driven, content-filled components.

Explicit Behavior

is demonstrated when visitors take action or submit data, such as voting in a poll, searching for a specific keyword, or filling out a form.

Rule-based personalization



Filling out a form



Making a purchase



Favorite-ing an item

Implicit Behavior

is demonstrated when a visitor looks at a particular type of page or follows a particular site path.

Predictive personalization



Browsing activity



Types of pages/categories



Pattern matches

Rules-Based Personalization

Setup

Building rules-based personalization requires some sort of driver to build the rule. For this, you will want to pull from the high-level strategic elements mentioned earlier. A quick win for personalization is using a goal, combination of goals, or a campaign to define what content is delivered to the user in a component. With proper setup, these components, or sections of your web page, will be individual elements that can be individually personalized. This allows for deeper personalization control of each page.

There are three main ways to personalize a component:

1. Change the content in the component

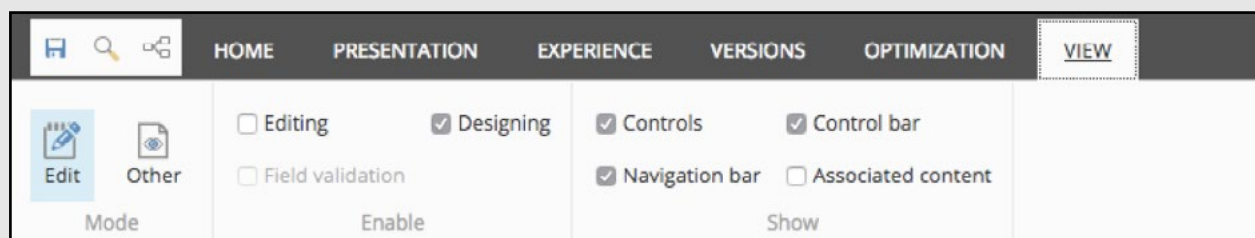
Is demonstrated when visitors take action or submit data, such as voting in a poll, searching for a specific keyword, or filling out a form.

2. Swap component type and function

Change out one type of component for another. For example, use a “form” or “poll” instead of a column of copy, or an “image and text” component instead of a “text only” component.

3. Hide the component from view

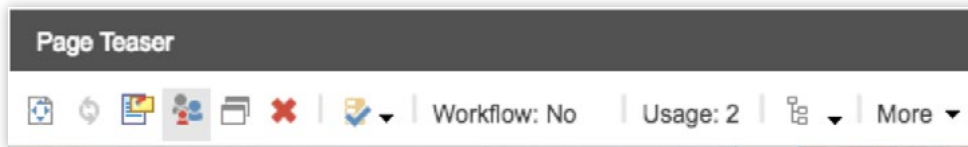
As the name suggests, choose to hide an entire component from view.



Using the Experience Editor, use the [VIEW] tab to turn on the navigation bar and move quickly through site pages. Also, pay attention to editor and designer modes. It's best to only have one on at a time, especially as you get comfortable with using the editor.

How to Setup Rules-Based Personalization of a Component in the Sitecore Experience Editor

- 1 Inside the Experience Editor, click on a component to select and activate the component toolbar and click the personalization icon.

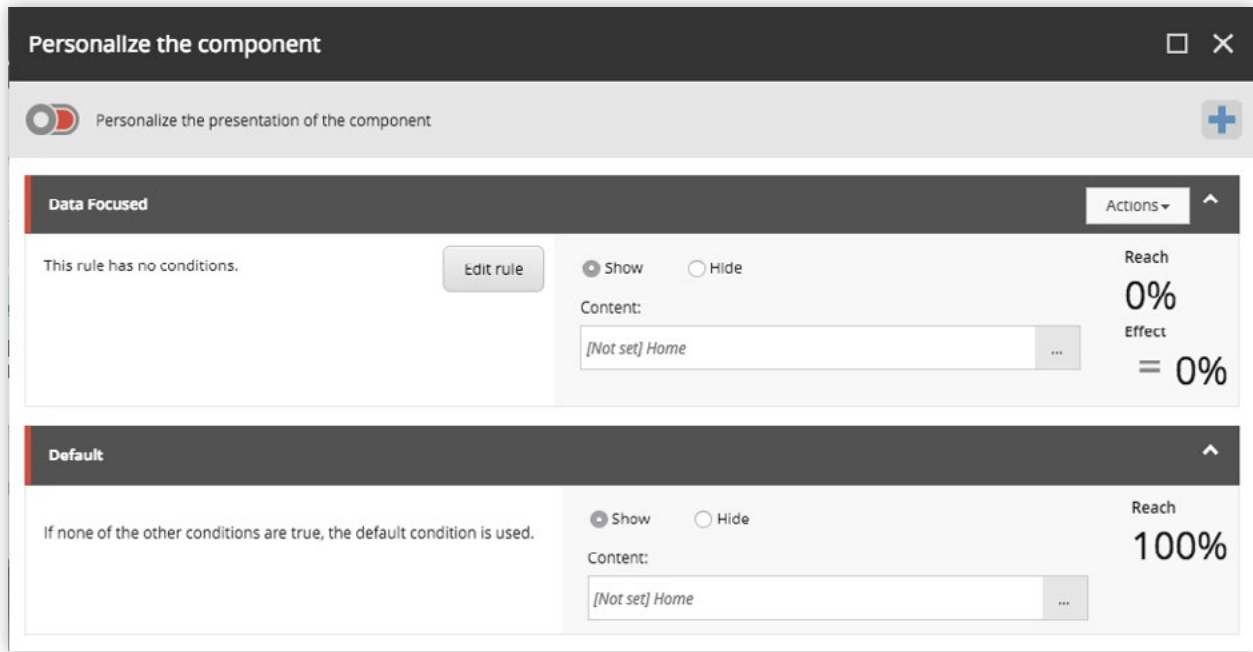


- 2 The default view cannot be deleted or moved. By clicking on the [+] in the upper right corner, you can stack a different personalization layer on top. (Note: You can stack multiple personalization layers and the Sitecore rules engine will analyze the rules from the top down, taking the version that first matches its rule. If no rules match, the bottom “Default” layer will be shown.)



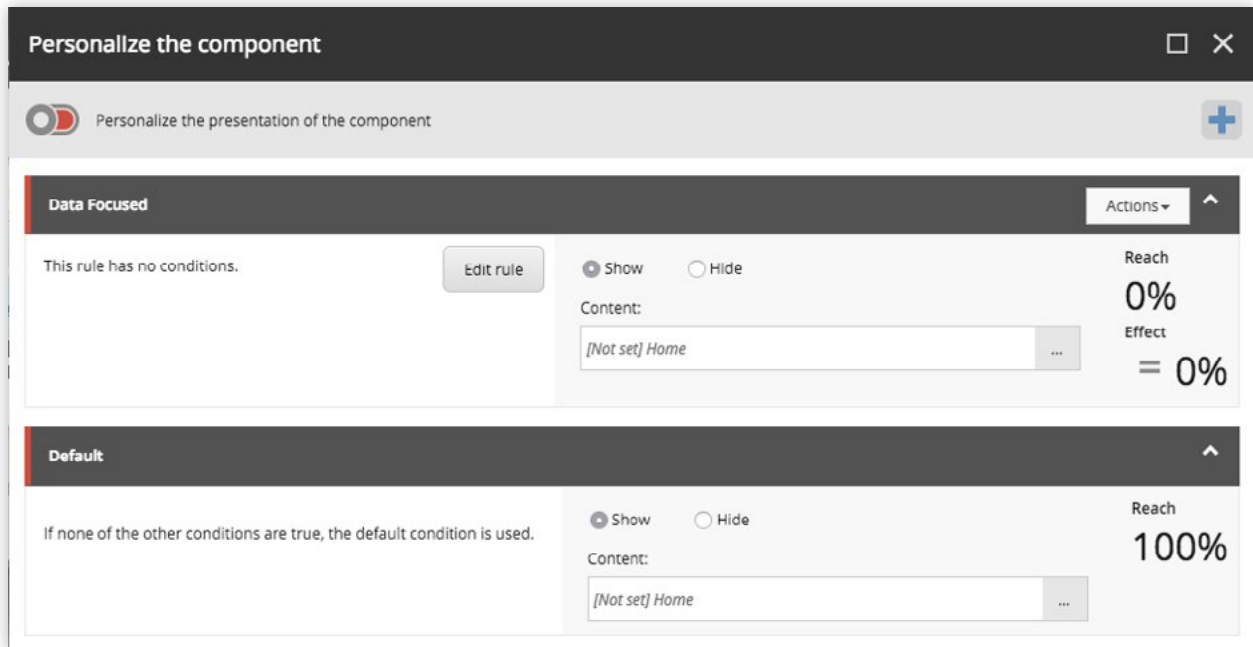
3

Name the new personalization layer for easy reference.

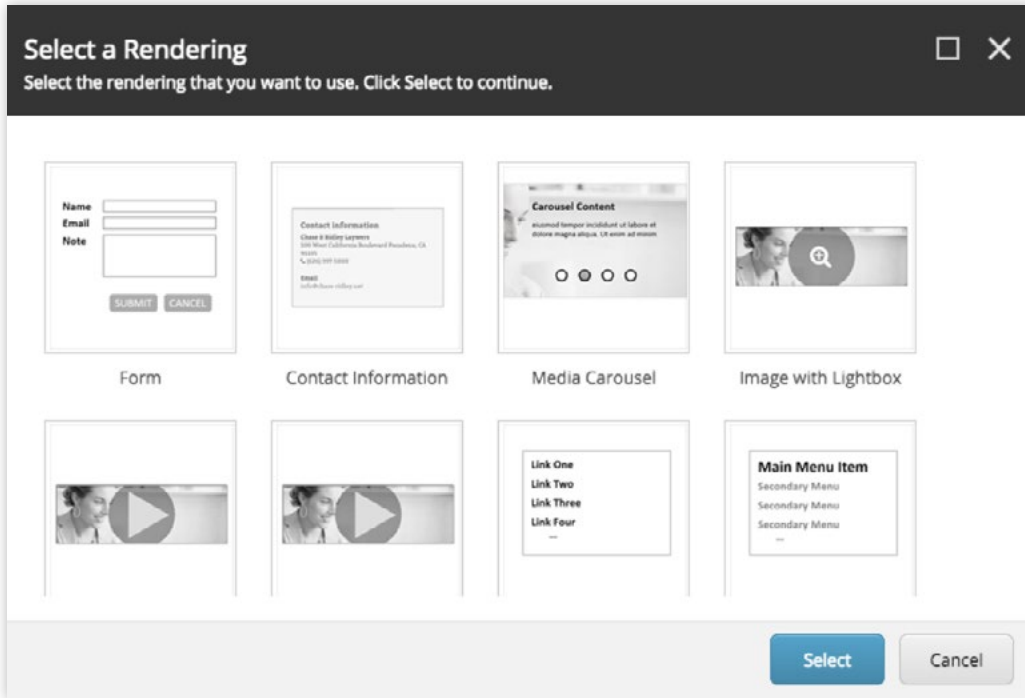


4

From here, you could simply start to change content, but note the slider in the upper left which allows you to change the component. Move the slider to reveal the component "Presentation" dialog.



5 You can now either select the [...] button for the component, which will allow you to select a component that is an approved replacement, or ...

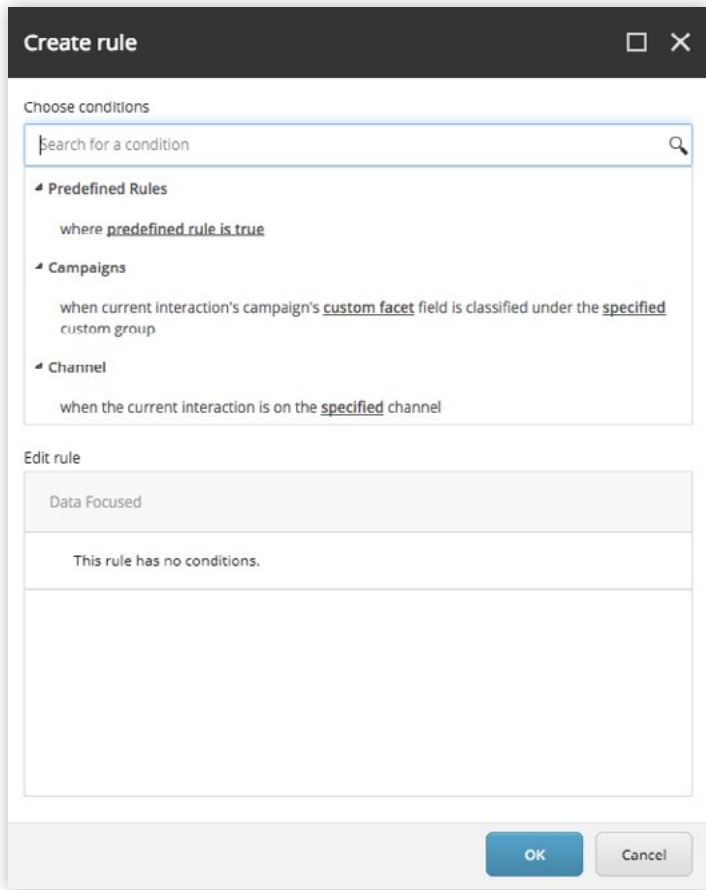


6 ...Select an existing content item from the available content. (Content can be pre-created, cloned, created from scratch, etc.)



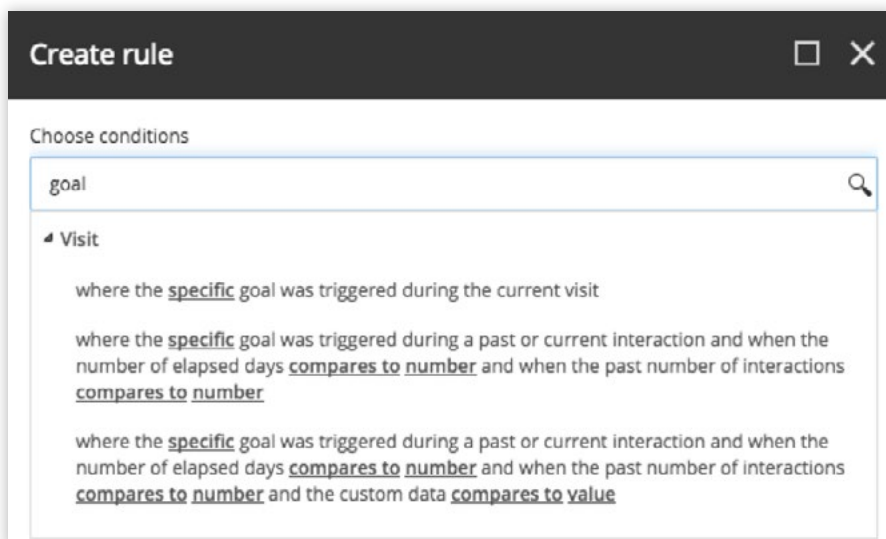
7

With the new content and/or component set up, click “Edit Rule” to view Sitecore’s powerful Rule Editor (many out-of-the-box rules are available, but this can be customized to fit your business).



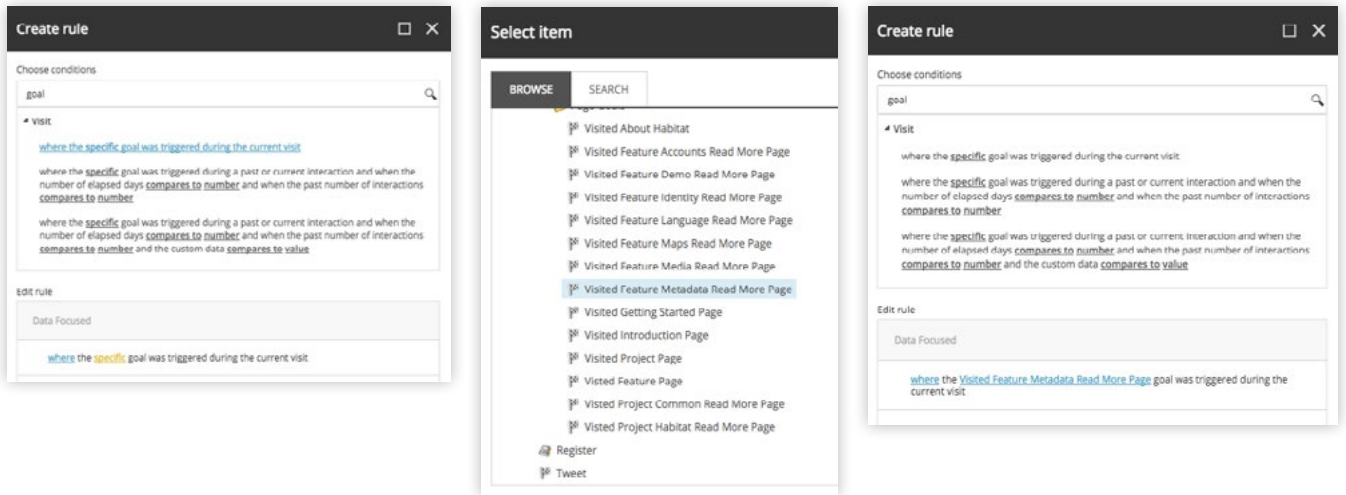
8

Use the search bar to quickly access a rule like Goal or Campaign, and it will pull up relevant rules.



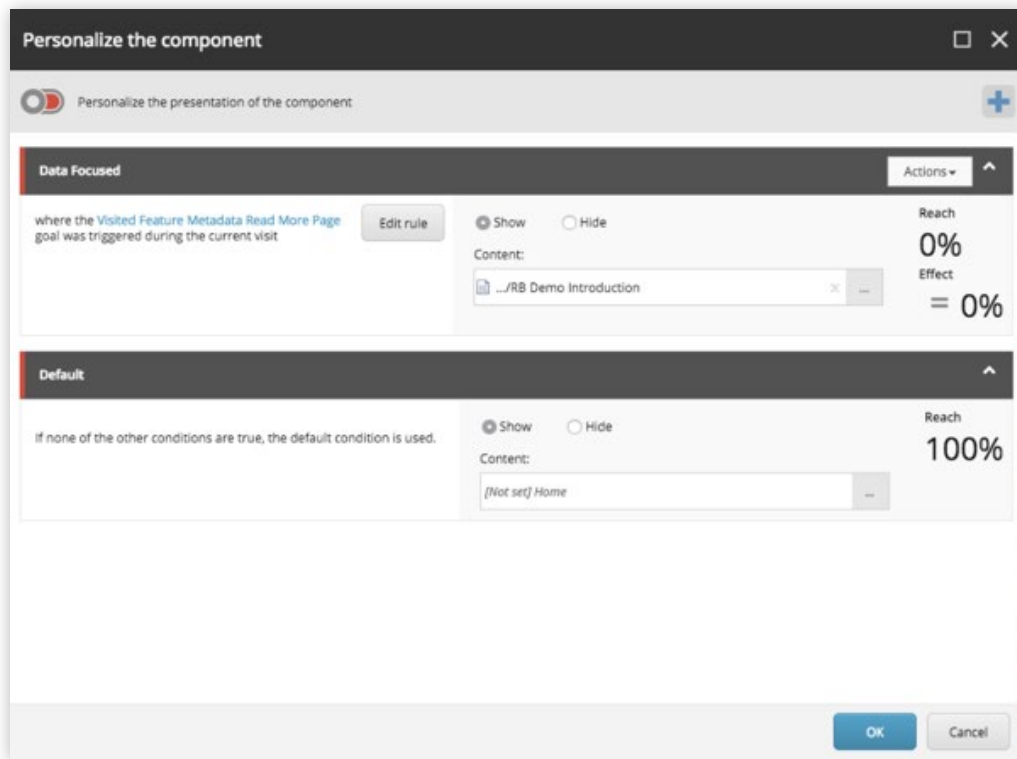
9

Build the rule by first clicking on the yellow text and then selecting (in this case) Punctuation: a goal. (You can create complex rules by adding more than one and using and/or phrases.) Finally, review your goal.



10

Click OK and review your personalization stack. Note the percentages on the right-hand side. These values will react based upon which rules are triggered by different users for quick reference.



11

Click OK and view the personalization in-line on the page by clicking on the drop-down menu.



12

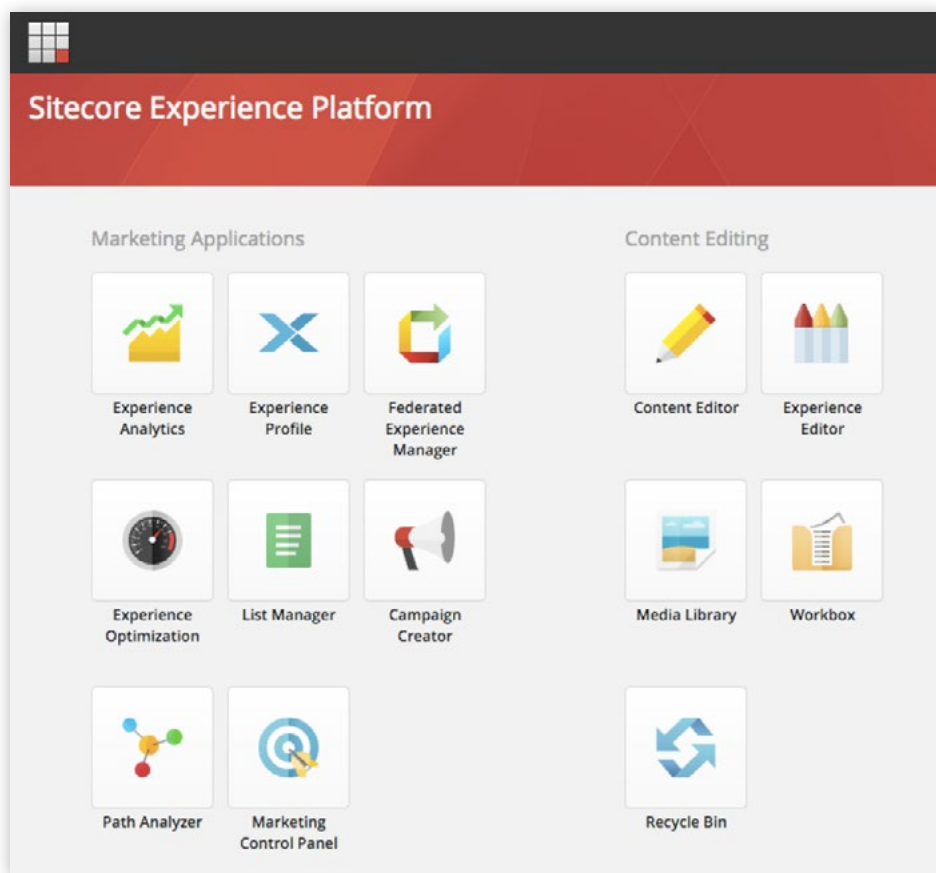
Save and Smart Publish.

How to Setup Behavioral Personalization

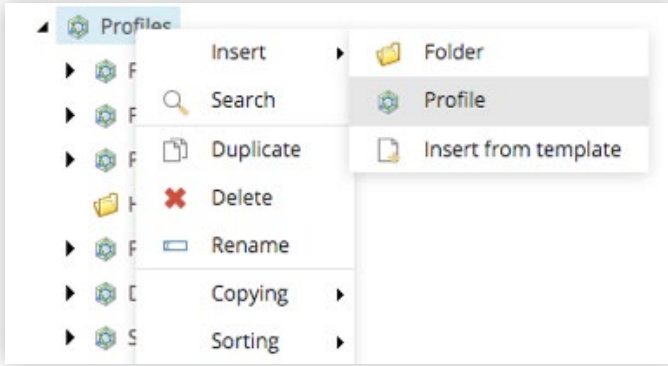
Dive deeper into personalization by continually tracking implicit user behavior. To do so, you need to take the personas you have, understand how they relate to content on pages, fill any content gaps, define the attributes that make up your personas, and ultimately recognize user patterns as they relate to your business and product(s).

Let's walk through the mechanics of setting up a persona-based profile.

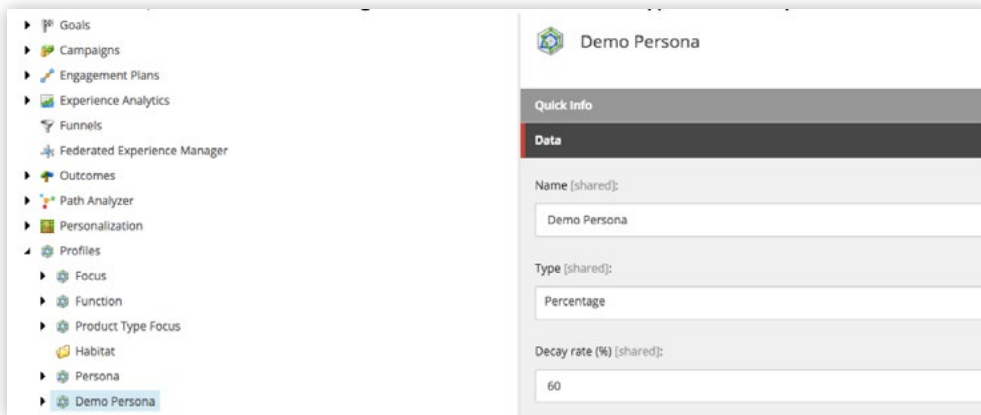
1 In the Marketing Control Panel, click on the Profiles folder in the tree.



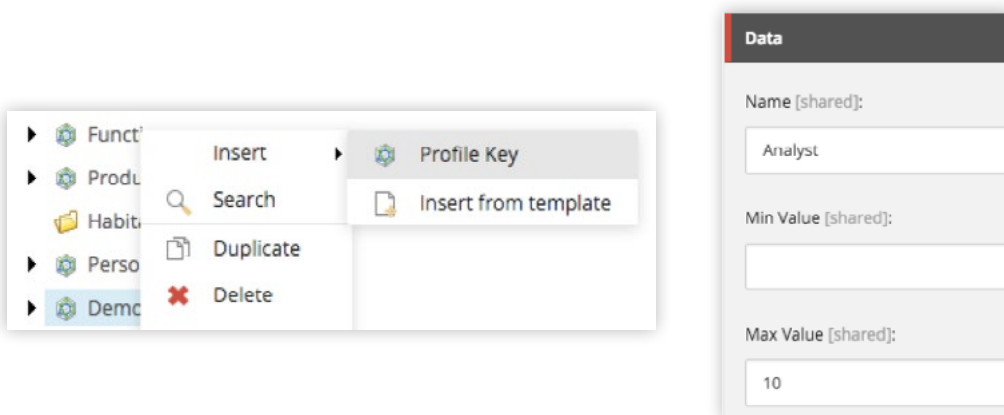
- 2 Click the Profile button under the Options tab, or right-click on the Profiles folder to create your Persona Profile. Give it a unique name and save.



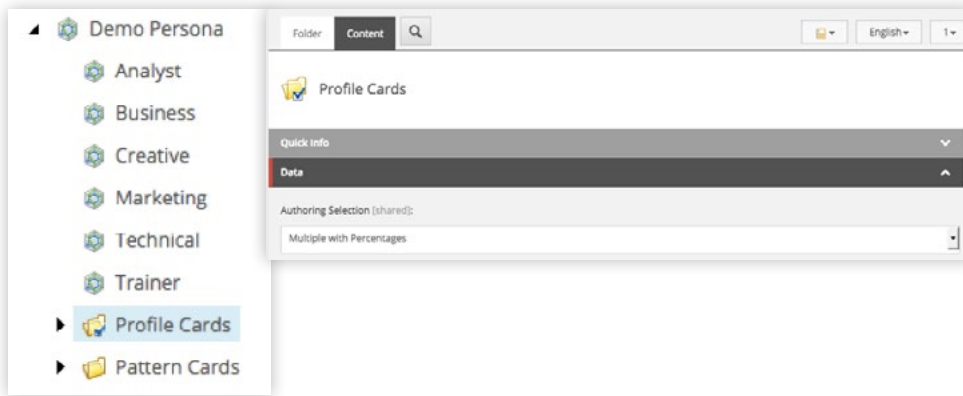
- 3 Once created, fine tune two settings in the Data section: Type and Decay Rate.



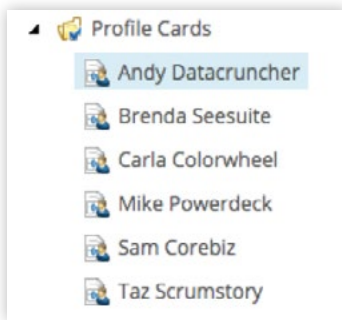
- 4 Right-click on the new profile and create your keys. These keys should be attributes that make up the Persona Profile Cards you will create next, and will be common across Profile and Pattern Cards. The name will auto-fill. Simply add a Max Value of 10 and save. Repeat for all keys.



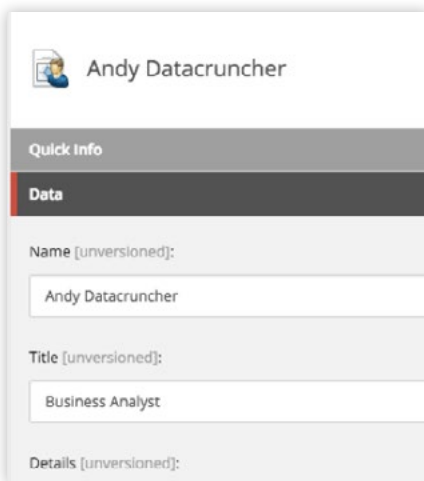
- 5 Click once on the Profile Cards folder, and then Data to define Authoring Selection (covered in detail in the “Type” post indicated above).



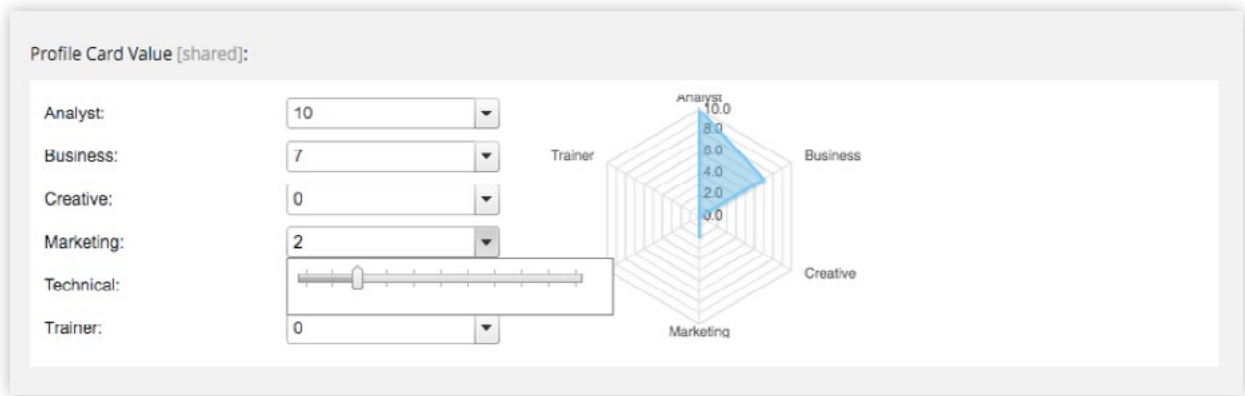
- 6 With the keys created, next create your first Persona Profile Card. Note there is also a non-Persona profile card, and the main difference is that the Persona version allows you to add more detail around the Persona. Whether you choose a non-Persona or a Persona profile, setting up the “keys” is a common and critical to a functioning Profile Card. Right-click on the Profile Cards folder to create.



- 7 Fill in as much detail about your persona as you and your team feel is important to the content authors/editors. They will be able to reference this information in the Experience Editor by hovering over the profile. A picture can provide a quick visual reference.



8 | IMPORTANT: Under Profile Card Value, use the sliders to apply the amount of each key that applies to this specific Persona Profile. This defines the pattern that will be picked up on the page visit.



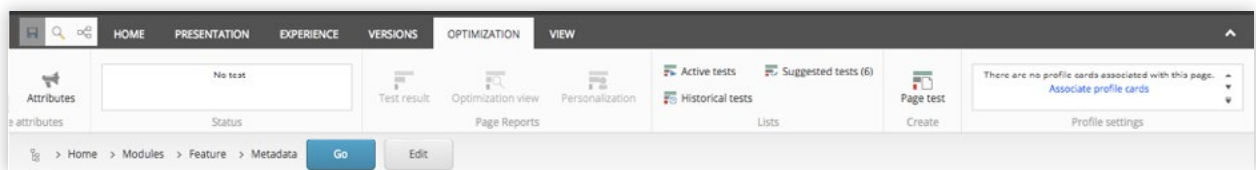
9 | Save.

10 | Repeat for each Persona Profile Card.

11 | Once all of your Persona Profile Cards have been created, select the top (main Profile) folder that contains all of your new keys, Profile Cards, and Pattern Cards folders. Then, Smart Publish (make sure that “Publish sub items” is selected). Once complete, they will be available for use.

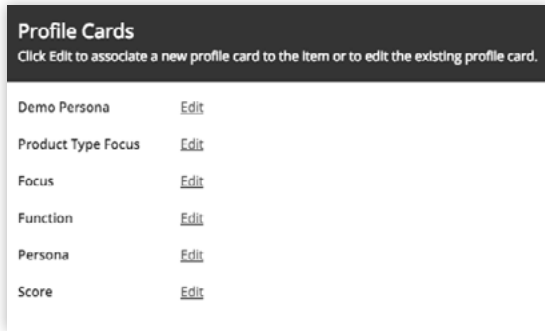
12 | You now need to apply your Profile Cards to pages. To start, apply them to key decision pages, landing pages, and pages with content that helps drive focus on a specific profile.

13 | In the Experience Editor under the Optimization tab, you will see a box on the far-right side where you apply these profiles to your page. If you don't see it, scroll the ribbon until you do.

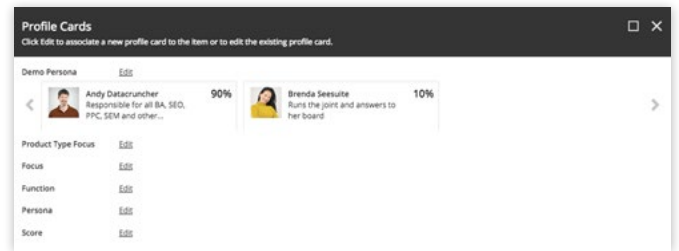
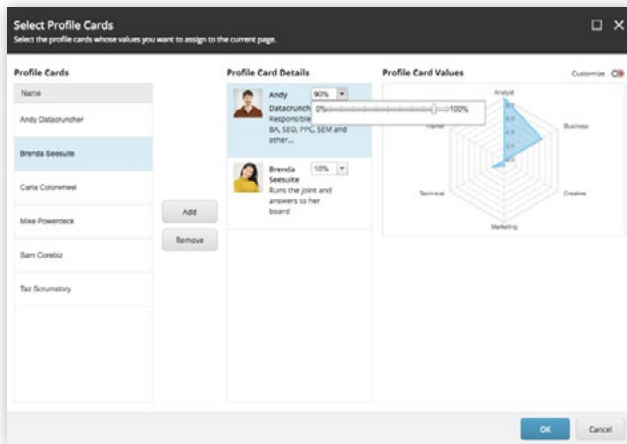


14 | Click the blue “Associate Profile Card” to apply your new Persona-Profile Card(s) to the page.

15 | In the Profile Cards dialog, you will be able to select from the different types of Profile cards. For now, let's focus on the unique Persona group you created by clicking the Edit button.



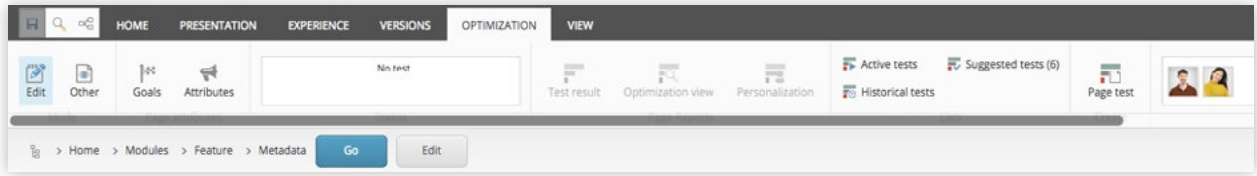
16 | Your profile card will appear on the left. Click the Personas that are relative to the content on this page and define percentages. If your math does not equal 100%, Sitecore will alert you. Once you have one or more Personas and percentages set, you will see the pattern that your users will inherit by landing on this page. It is important to note that once you have cards set up on many pages, this pattern will be ever-evolving during the session and even across multiple sessions.



17 | There is an option to create a custom pattern, and this option can be disabled per user/role. It is recommended that unless you are an admin, have your development partner turn this off.

18 | Once defined, click OK, review your settings, and click OK again.

19 | You will see the patterns or images in the upper right corner of the ribbon. Save the page and publish.



20 | Repeat for other pages.

21 | Let your Profile Cards “run” for 3-6 months to get a feel for what patterns develop and how users explore your site, how they convert, etc. Look for patterns that relate to your business. Then, in the Marketing Control Panel, right-click on Pattern Cards and create a Pattern Card.

- ▲
📁
Pattern Cards
 - 📄 Business Decision Maker
 - 📄 Creative Technician
 - 📄 Demo Jockey
 - 📄 Helix Focused Developer
 - 📄 High level check writer
 - 📄 Marketing Focused Product Owner

22 | Name the card as it relates to your business and - just like the Profile cards - determine how the common keys are set using the sliders.

▲ 📁 Pattern Cards

- 📄 Business Decision Maker
- 📄 Creative Technician
- 📄 Demo Jockey
- 📄 Helix Focused Developer
- 📄 High level check writer
- 📄 Marketing Focused Product Owner

Analyst:

Business:

Creative:

Marketing:

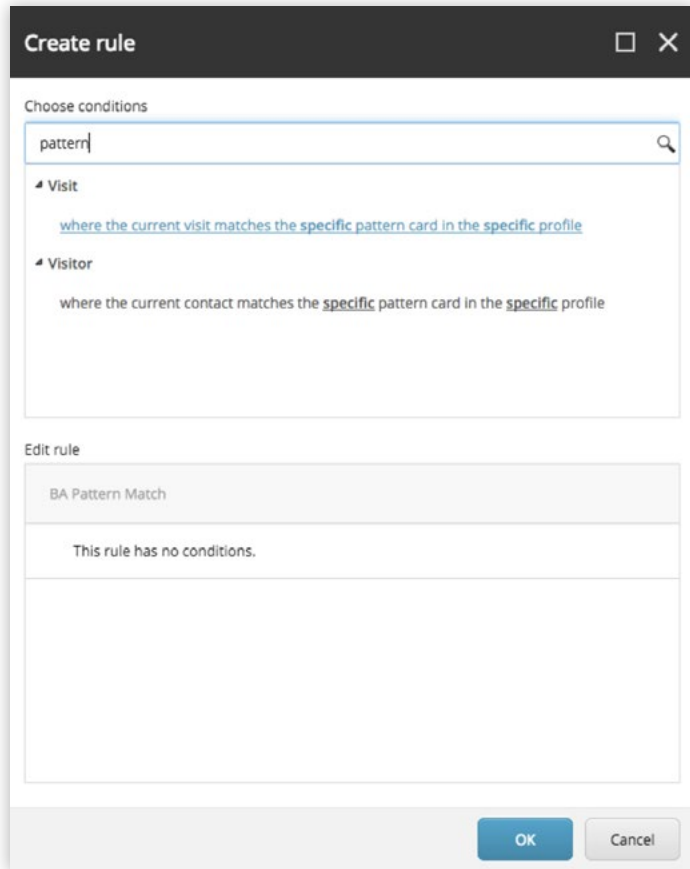
Technical:

Trainer:

Skill	Level
Analyst	10.0
Business	7.0
Creative	0.0
Marketing	0.0
Technical	0.0

23 | From here, you will apply the patterns to components. This is simply a rules-based personalization setup from this point.

24 | Navigate to the page and component you wish to personalize. Choose the personalization icon in the component toolbar and add your personalization layer.



25 | Choose the Content, Component, or Hide methods and finish your selections as you would in rule-based personalization.

26 | Edit the rule and type “pattern” in the search tool to pull up pattern options.

27

Add the pattern rule of choice, select the profile and pattern that maps to the content and then review.

The image displays a user interface for configuring personalization rules. It is divided into three main sections:

- Select Profile:** A panel with a 'BROWSE' tab and a 'SEARCH' input. A list of profile categories is shown, with 'Demo Persona' selected and highlighted in blue. Other categories include Focus, Function, Product Type Focus, Persona, and Score.
- Select Pattern:** A panel with a 'BROWSE' tab and a 'SEARCH' input. A list of patterns is shown, with 'Business Decision Maker' selected and highlighted in blue. Other patterns include Creative Technician, Demo Jockey, Helix Focused Developer, High level check writer, and Marketing Focused Product Owner.
- Personalize the component:** A larger panel with a title bar and a close button. It contains a toggle for 'Personalize the presentation of the component'. Below this, there are two rule configurations:
 - BA Pattern Match:** A rule with the condition 'where the current visit matches the Business Decision Maker pattern card in the Demo Persona profile'. It includes an 'Edit rule' button, 'Show' (selected) and 'Hide' radio buttons, and a 'Content' field containing '.../RB Demo Introduction'. Performance metrics show 'Reach 0%' and 'Effect = 0%'.
 - Default:** A rule with the condition 'if none of the other conditions are true, the default condition is used.' It includes 'Show' (selected) and 'Hide' radio buttons, and a 'Content' field containing '[Not set] Home'. Performance metrics show 'Reach 0%'.

28 | Repeat for other components, but keep it simple to start (hero banners, CTAs, etc.).

29 | Save and publish the page.

With all items properly saved and published, as users traverse your site they will pick up Profile Card patterns based on what is defined on the page. Sitecore will “listen” for these patterns and serve up component-level content based on the pattern it “hears” when the page is rendered. This can change over time and can be grouped with other rules-based goals.

Out of the box – with the ability to combine goals, campaigns, and behavior – Sitecore gives you the tools to create complex personalization scenarios and drive your customers to conversion. With a keep-it-simple model that evolves over time, you and your team can carefully define content and user journeys that will conservatively lead to a 19% improvement on key performance indicators.



Mastering customer experience provides the competitive edge for today's organizations. As more companies lead the way in personalization, this will continue to raise the bar for consumers' expectations.

And personalization goes beyond knowing who your customers are – they want to see the value in the experiences your company provides, based upon your knowledge of them.

With a more holistic view of your customers that's backed by a solid technology platform like Sitecore, you can create, test, and optimize experiences to keep them coming back for more. Then, partner with an experienced team like Perficient Digital that will not only help you implement the solution, but also create a strategy to align people and processes to embrace it.

References

1 "The Realities of Online Personalization" Econsultancy.com Ltd., April 2013.

2 <https://www.demandmetric.com/content/content-personalization-benchmark-report>

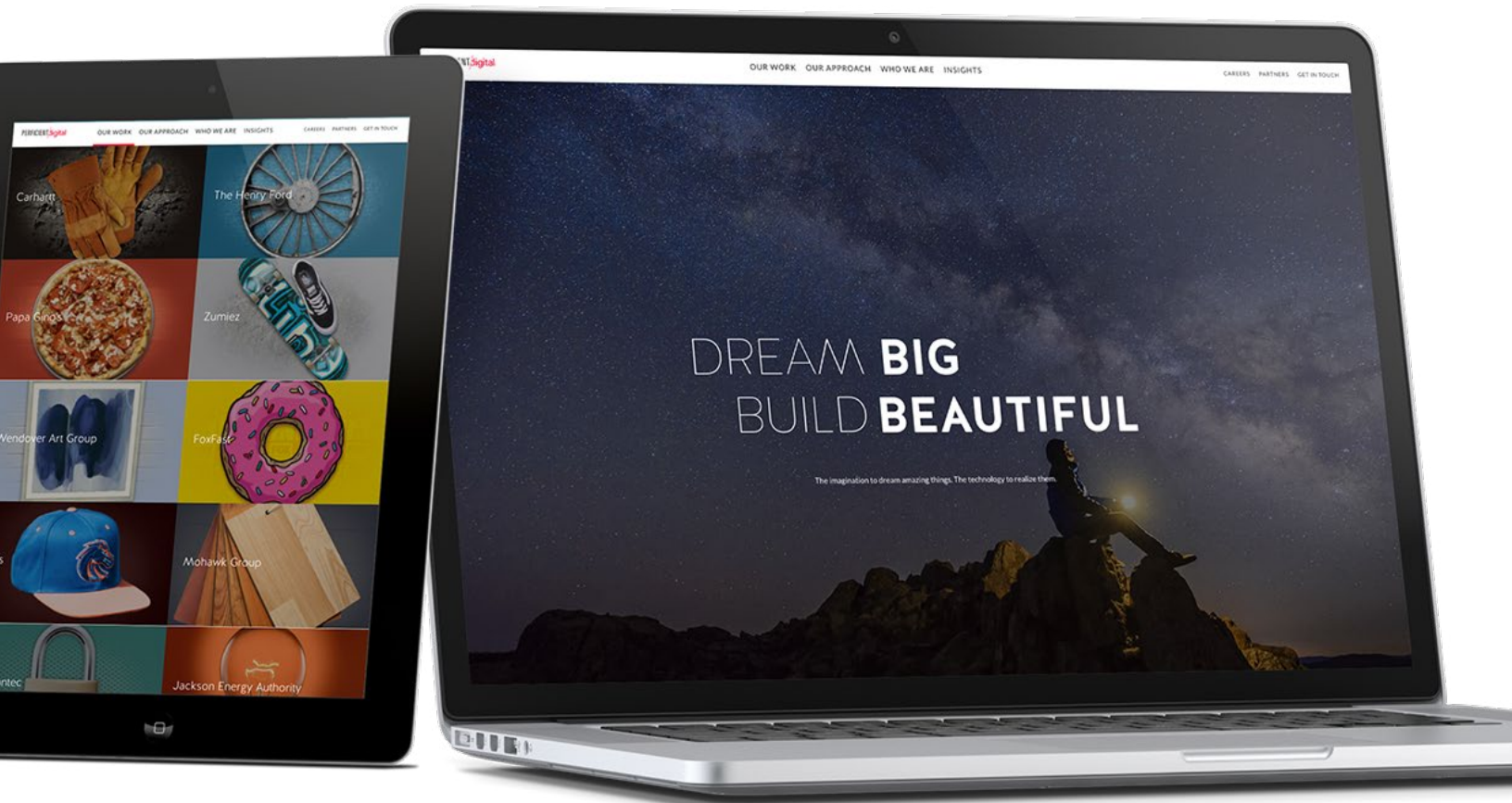


About the Author

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Rick provides insight, training, and a passion that maximizes the potential of the Sitecore Customer Experience Platform. He utilizes his years of hands-on Sitecore experience and certifications to help deliver clear solutions and actionable results for marketers – those either new to the platform or those looking to take it to the next level of maturity.



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Perficient Digital and Sitecore combine the innovation and imagination of a digital agency with the strategic insights and technical capabilities of our Sitecore platinum implementation specialists. Driven by customer insights, we gather and analyze the data to design, architect, and implement websites built on the Sitecore platform. Our experts craft an experience that tells a story and enables you to connect with consumers where they are – across mobile, tablets, and desktops. And, with a deep understanding of business needs and extensive technical capabilities, we can integrate solutions across a wide variety of applications, providing a seamless customer experience.

Our full-service offering is designed to tackle your ever-changing, ever-increasing business challenges. End-to-end is just the beginning.