MARKETER GUIDE

MARKETING FACTORY 1.6

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SUMMARY

1 INTRODUCTION

1.1 PREREQUISITES

To read this guide, a minimal knowledge of Digital Experience Manager is required. Some of the instructions given refer directly to how authors manipulate webpages and content in Digital Experience Manager; this guide does not explain in detail or redefine the terms that are specific to Digital Experience Manager and assumes that those concepts are already known to the reader.

1.2 WHAT IS MARKETING FACTORY?

Marketing Factory is a set of tools for marketers to optimize their digital performance. Marketing Factory is composed of two parts: a graphical interface that is built as a Digital Experience Manager module and a server that is actually the Apache Unomi Context Server. This Context Server stores visitor properties and interactions with your websites, and provide a set of services for tracking, personalization, reporting...

These tools allow marketers to:

- Automate data collection about the visitors and their online activities.
- Get detailed reports and insights.
- Constantly nurture rich profiles.
- Create relevant events that marketers want to monitor.
- Create personalized experiences for their visitors.
- Improve their online efficiency by running optimization tests (A/B testing).

1.3 WHAT MARKETING FACTORY IS NOT

Marketing Factory is not a web analytics engine and is not intended to replace your existing engine; you should use both systems in cooperation. While partially working with the same type of data (such as, visits, URL, IP address, date, etc.) and providing some similar insights, Marketing Factory does not focus on providing traffic information as web analytics engines do. Web analytics engines are centered on pages and traffic, providing global data, filtered by purely contextual information (such as, visitors, OS, browser, device, location during the visit, etc.). They are ideal to help you understand the flow of traffic inside your website; however, web analytics engines cannot provide a comprehensive view of this traffic by cross-referencing every single piece of information you know about your visitors as with Marketing Factory. Marketing Factory is centered on people and events. It provides less data about the overall traffic but offers a much deeper understanding about who does exactly what through your digital properties and content. Marketing Factory allows you to analyze your audience and your audience activity not only by contextual information (which changes moment to moment) but also by all the non-contextual information that has been gathered. Your capacity to make educated marketing decisions is increased as a result.

Marketing Factory is not a Customer Relationship Manager (CRM). You do not manage your customers nor the sales cycle inside Marketing Factory as you would in a CRM, even if both systems are focused on people. Instead, Marketing Factory works on the frontline with both anonymous and identified visitors to collect data, build rich profiles and which can be used to improve the visitors' digital experiences. The CRM is more a back-end tool that takes charge of your audience once it is at least a qualified lead or a customer. Marketing Factory and CRM should, nevertheless, work closely together as both are valuable and complementary tools to manage the customer experience.

Marketing Factory is a toolbox that marketers can use to collect data around user behavior, user preferences and other site activities. It's not a decision making engine. It's the marketer's responsibility to first define the measurements (using Marketing Factory), review and analyze the

collected data and use this information as the foundation for marketing relevant decisions and strategy definitions. This data profiling is a repetitive process: measure, analyze, decide, improve and measure again, constantly, with the goal to optimize business objectives, like conversion rates, branding penetration and more. The examples in this guide will not only show how the GUI works, but are geared towards creating such "real life" scenarios as well.

Marketing Factory is not a magical wand, it's a toolbox. How marketers will decide to use it and what digital tactics they'll implement does not depend on Marketing Factory but on their own choices. Marketers have the responsibility to elaborate a coherent strategy, use that toolbox to collect the information they need about their visitors and customers, nurture a continuous profiling and deliver personalized experiences that will improve their performances. Possibilities offered by Marketing Factory are countless and it is the intelligent combination of all the provided tools that will make the success of marketers' digital strategy. We've tried to insert in this guide some "real life inspired" examples of Marketing Factory in action, just to give some ideas and show not only how the GUI of the software work, but what it is useful for and what is possible to do with it.

1.4 WHAT MAKES MARKETING FACTORY DIFFERENT?

1.4.1 Open source, Oasis, Apache and privacy

First of all, what makes Marketing Factory unique is that it is based on the Apache Unomi server. This open source server is the reference implementation of the OASIS Context Server standard. This specification defines a REST API that is in charge of collecting user events (such as page views, downloads) and updating a visitor profile on-the-fly, essential elements for building personalized systems. Having both a standard and an open source reference implementation in two highly respected communities (Apache Software Foundation and OASIS) is essential to building an ethical web personalization solution that is completely open and transparent.

Also, within the standard work, unique privacy features have been included to give end-users more control of the collection and management of the data that is collected by the Context Server.

1.4.2 Ease of use

Marketing Factory's number one feature is its ease of use. Compared to other digital marketing platforms, the creators of Marketing Factory have made a strategically extraordinary decision: reduce complexity by providing a reduced amount of features but that cover 100% of the marketers day-to-day business.

During the process of developing Marketing Factory, we have studied several customers using other "well known" marketing platforms. We noticed that the majority of them are paying a very high price for a rich features set, but barely use 15% of them. In fact, a significant part of those customers even stopped using them after a while because they are either too complex and / or too time-consuming compared to the results obtained. Our goal is that Marketing Factory customers use 100% of the product features.

1.4.3 No IT - just point-and-click

Once Marketing Factory is installed and configured (which is done in a matter of minutes or hours depending on your infrastructure and operation constraints), marketers do not need IT help to use the features that are provided by default. Not even once.

This is a major difference from other marketing automation, analytics or personalization and targeting platforms, which often require weeks of integration and configuration to work correctly with a Content Management System (CMS). And then, once installed, rely heavily on manipulating and tweaking JavaScript files or snippets (requiring xml or database expertise). Each time marketers need to add a property in the users profile, store a new event or simply declare a goal,

they have to modify a script, deploy it and pass new parameters in a cryptic language and format. All in all, those platforms are not agile at all and impede the marketers in executing their strategic or tactical moves at the speed they need, to stay ahead of the competition.

1.4.4 Flexibility and extensibility

Marketing Factory has been built to be extensible from the beginning. As its primary task is to collect visitor information in order to reuse for personalization, Marketing Factory profiles and events can be extended by declaration using graphical user interfaces, no coding or scripting required. That means that if you, the marketer, want to collect a new piece of information about your visitor(s), some idea that just came to your mind, even if you think it may be useful later, you simply need to create a new property, give it a (meaningful) name and voilà!

Of course, Marketing Factory is also extensible through code and benefits from a REST API allowing your IT team(s) to implement complex and fully customized scenarios that cannot be covered by the default features or user interfaces.

1.4.5 Infinite drill-down and data cross-referencing

One of the most interesting features in Marketing Factory is certainly the built-in easy-to-use analysis capability and the ability to apply nearly every piece of data as an analysis dimension to evaluate your online marketing efficiency and understand your customers.

Most platforms provide averages, aggregates and other pre-defined reports but do not allow marketers to refine the analysis as they want. For instance, A/B testing systems only tell you that version A has a conversion rate of 3% when version B has a conversion rate of 5%. That is a start, and it is already good to know, but these systems are not able let you break-down that 5% conversion rate by gender, nationality, location, number of visits, etc. to determine whether it resonates better with some target segments of your visitors or also discovers even better optimization options. Marketing Factory does all that!
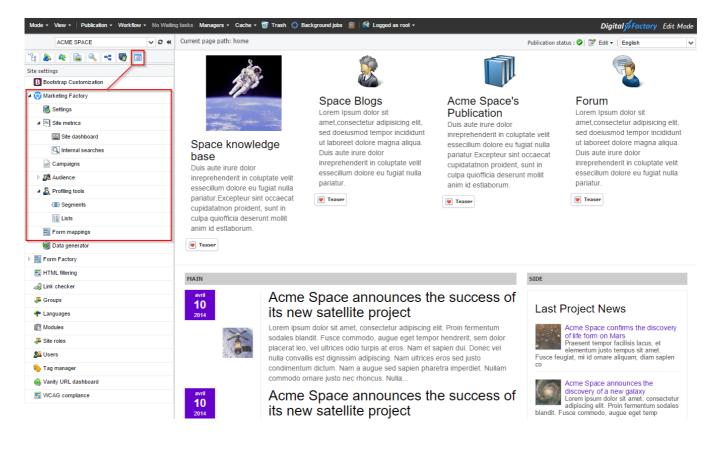
1.5 ACCESSING MARKETING FACTORY

Marketing Factory is fully integrated with Digital Experience Manager graphical user interface (GUI) and can be accessed (with proper rights) at any time that authors are editing a site, in context.

Marketing Factory tools and reports are accessible in Edit Mode. On the tab bar click on the site setting tab and select "Marketing Factory" from the context menu to see the different available features and reports.

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Personalization and optimization are done in Edit Mode, directly in the webpages, using the usual content editing methods like double-click or right-click on content paragraphs to open the edit dialogs.

2 CONCEPTS

This chapter introduces marketers to the main concepts behind the scenes and explains some of the recurring tools or features that are widely used across the software to avoid repetition throughout this guide.

2.1 AUDIENCE, VISITORS AND PROFILE NURTURING

We use the term **audience** to refer to your entire population of visitors. At the heart of Marketing Factory is the ability to collect data about your audience and reuse that data in multiple situations.

A **profile** is the name given to the complete set of data known about a given visitor.

This profile contains different types of information:

1. Properties (name, address, age, number of kids, etc.).
2. Behavioral information (pages visited, goals achieved, etc.).
3. Contextual information for each visit (browser, device, geolocation, etc.).
4. Classification information (visitor belongs to certain segments, has been assigned to lists, etc.).

Marketing Factory creates a profile automatically each time a new visitor accesses a tracked site, even for anonymous users, and immediately starts collecting data. Behind the scene, when a new visitor arrives, Marketing Factory stores a cookie in his browser cache with a unique identifier. The unique identifier is also stored in the profile, identifying this cookie which in addition will allow Marketing Factory to identify the user during his visit(s).

Each time the visitor comes back to the website and performs certain activities, his profile is updated with new or more current data. For example, if one day the visitor identifies him- or herself somehow (by logging into Digital Experience Manager, logging in with Facebook or

providing his or her name or email in a form), then the profile is no longer anonymous and all data collected previously remains attached to that visitor profile.

Obviously, when the same visitor uses two different devices or browsers, Marketing Factory will create several different profiles (one for each browser / device) and, at first, is not able to know that it is the same person. However, Marketing Factory contains a built-in mechanism to merge profiles.

As soon as a user identifies him- or her by trustable means (using a login) on two different devices or browsers, Marketing Factory understands that the multiple profiles already created are, in fact, related to the same user and is then able to gather all those profiles into a single master record. Going forward, Market Factory then continues to track all user activities in that merged profile even if the user comes back without re-logging in because all his or her cookies are linked to that unified profile.

📄 **INFO**

Note that the two last categories are, in fact, **segments**. Therefore, you can modify the conditions that defines contacts and leads to adapt them to your own needs / business protocols / way of seeing things.

2.2 EVENTS AND GOALS

Events are, basically, the interactions between a visitor and your digital touchpoints that are under Marketing Factory surveillance. Some events are collected by default each time they occur, like a session start or a page visit. Some events are collected only because they have been explicitly requested by the marketers in charge of the site by using the software interfaces.

Goals correspond to such types of events that are not collected by default but are collected upon request. Typically, a marketer declares a goal to use it as:

1. A (key) performance indicator (KPI), or,
2. A condition to search, extract, export or filter the profile's repository, or,
3. A condition for building segments or personalization, or,
4. An analysis criteria point, or,
5. All the above points at the same time.

When a visitor reaches a goal, it said to be a conversion. If the goal type allows it, Marketing Factory not only provides absolute numbers for the goals (like the exact number of conversions) but also a conversion rate as a measure of efficiency.

2.3 REPORTS, CONVERSIONS AND ANALYTICS

One of the key features of Marketing Factory is the **infinite drill-down** capability, which allows marketers to analyze any measured conversion by any property stored in the visitor's profile and refine (or, break-down) their analysis reports over and over.

The infinite drill-down is accessible in:

1. Site goals reports,
2. Campaign goals reports,
3. Optimization test reports, and,

The infinite drill-down capability may be extended to other parts of Marketing Factory later.

For each and every measured result (goals, optimization tests, etc.) Marketing Factory provides two ways to analyze the results, which make the understanding of visitors' behavior both simple and very detailed: the **quantitative analysis** and the **qualitative (or performance) analysis**.

Quantitative analysis		Filter on: Gender ▼
Gender ⇅	Success ⇅	Percentage ⇅
female	443	41.32 %
male	432	40.3 %
Not provided	197	18.38 %

Performance analysis			Filter on: Gender ▼
Gender ⇅	Views ⇅	Success ⇅	Conversion ⇅
female	9339	443	4.74 %
male	9204	432	4.69 %
Not provided	3780	197	5.21 %

2.3.1 Quantitative analysis

The quantitative analysis report lets you understand who contributed data to your goal, it gives a detailed view of how the entire population of converted users is composed of or whatever the criteria of analysis you choose. In a way, this report is close to what web analytics engines provide, except that you can view the results by properties that web analytics engines typically do not track although they are much more valuable for marketers.

Let's take the following goal as an example.

Registration form ⋮

22323 — **1072**
Site visits   Page views

4.8%

And have a look at the quantitative performances report.

Quantitative analysis		Filter on: Nationality ▼
Nationality ⇕	**Success** ⇕	**Percentage** ⇕
usa	105	9.79 %
russia	112	10.45 %
kenia	130	12.13 %
canada	116	10.82 %
switzerland	92	8.58 %
france	105	9.79 %
austria	102	9.51 %
ukraine	113	10.54 %
Not provided	197	18.38 %

The first column displays the break-down of the selected property for every value that has been collected (8 nationalities, the rest of the audience is unknown).

The second column "success" tells how many visitors achieved the goal. Here 105 American citizens submitted the form (the goal), 112 Russian citizens, etc.

The third column tells you what percentage of the population this line represent. Here 9.79% of the visitors who achieved the goal were Americans, 9.79% French.

Each column is sortable by ascending or descending order.

You can choose in the "Filter on" drop down list any other criteria, for instance the gender.

Quantitative analysis		Filter on:	Gender ▾
Gender ⬍	**Success** ⬍	**Percentage**	⬍
female	443	41.32 %	
male	432	40.3 %	
Not provided	197	18.38 %	

In both cases, we have the same total number of visitors who achieved the goal, obviously, but with a different split criteria.

What becomes really interesting is drilling-down those results. If you select one line in the table by clicking on it, this subset of the population is selected as new scope of analysis and you can then do the same type of analysis by any criteria.

If we click on "female", the first line. This criteria will appear in the header of the table and the scope of analysis is not on the 1072 conversions but only on the female population (443 conversions). As an additional criteria we have chosen to split this population by Operating System.

Quantitative analysis

Gender : female ✖   Filter on: Operating system family ▼

Operating system family	Success	Percentage
windows	291	65.69 %
os x	69	15.58 %
unknown	83	18.74 %

We can continue to add criteria, always by clicking on the subset of population that interests us.

Quantitative analysis

Gender : female ✖   Operating system family : windows ✖

Filter on: First visit ▼   Interval   **Month** ▼

First visit	Success	Percentage
2014-12-01	0	0 %
2015-01-01	2	0.69 %
2015-02-01	1	0.34 %
2015-03-01	152	52.23 %
2015-04-01	112	38.49 %
2015-05-01	13	4.47 %
2015-06-01	11	3.78 %
2015-07-01	0	0 %

The more data has been collected the more detailed and meaningful the results will be.

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By choosing relevant criteria, marketers can understand who (in volume) is converting and have a perfect view of their audience. In the example below, we see that: 43% of the U.S. women citizens who reached the primary goal are older than 51 years of age.

Quantitative analysis

Nationality : usa ✖   Gender : female ✖   Use Ranges ☑

Filter on: Birth Date ▼

Interval: **Month** ▼

Birth Date	Success	Percentage
Greater than 51	24	42.11 %
Between 50 and 41	6	10.53 %
Between 40 and 31	3	5.26 %
Between 30 and 21	9	15.79 %
Between 20 and 11	2	3.51 %

NOTE

It is possible to remove a filter at any time, just by clicking on the red-cross near its name.

2.3.2 Performance analysis

Knowing who achieved a goal is certainly a good thing, but being able to understand how your population performed against that goal compared to one or more criteria, that's something completely different and that's the objective of the Performance analysis table.

This report is even more interesting than the quantitative report, because this is where you can expect to find-out some patterns, some different behaviors between your different segments of population, the number of users who matched that goal, and thus improve drastically your performances by creating more targeted personalization.

In terms of usability, the qualitative analysis works exactly as the quantitative one, by selecting a first criteria in the drop down list of available properties, then selecting an entry and drilling-down as long as Marketing Factory is able to provide data to analyze.

Using the same goal we can already see that the conversion rate is different from one nationality to another one.

Performance analysis

Filter on: Nationality ▼

Nationality	Views	Success	Conversion
usa	2355	105	4.46 %
russia	2354	112	4.76 %
kenia	2344	130	5.55 %
canada	2325	116	4.99 %
switzerland	2314	92	3.98 %
france	2307	105	4.55 %
austria	2272	102	4.49 %
ukraine	2272	113	4.97 %
Not provided	3780	197	5.21 %

Comparing the population age for the USA we discover that the population between 31 and 40 does not convert well, while however the population elder than 50 converts globally well.

Performance analysis

Birth Date	Views	Success	Conversion
Greater than 51	846	47	5.56 %
Between 50 and 41	211	13	6.16 %
Between 40 and 31	220	7	3.18 %
Between 30 and 21	223	19	8.52 %
Between 20 and 11	98	3	3.06 %

Nationality : usa ✖   Use Ranges ☑   Filter on: Age ▼

Based on that discovery, a marketer could decide to modify his site by better targeting the people between 31 and 40 by improving the CTA(s) intended for this segment and leaving the current content for people under 50.

2.4 CONDITIONS BUILDER

In many situations, marketers will need to select, or extract, visitors from the whole population or build rules to define which visitors should see what information, by providing personalized experiences

Each time, marketers will use the same tool called the *Conditions Builder*. The following pages explain the principles of building conditions. Later in this guide we'll refer to building conditions several times without giving detailed explanations to avoid repeating over and over again.

The Conditions Builder allows marketers to define a rule that contains an unlimited number of **conditions. These conditions are** linked together using the **operators** AND or OR. They can group

several conditions together and nest conditions in order to define very precise and complex queries if needed.

2.4.1 Conditions

Each condition is built in the same format: an attribute, followed by a comparator, followed by a value (optional).

An attribute	A comparator	A value (optional)
Age	>	25
Date of birth	Is before	1985
City	=	Denver
Kids	exist	
Zip	Contains	

The comparators will vary depending on the types of attributes.

Here is an example for a text attribute; the available comparators are the following (middle column):

Text Attribute	Comparators	Example of value
Last name	Equal	schwarzenegger
Last name	Doesn't equal	Stalone
Last name	Starts with	swartz
Last name	Ends with	egger
Last name	Matches regular expression	^sch.*gg.

Last name	Contains	Egg
Last name	Exist	*Means that the property is not empty*
Last name	Is missing	*Means that the property is empty*
Last name	Is in	Stalone, Lungren, schwarzenegger
Last name	Is not in	Stalone, Lungren, schwarzenegger

For a date attribute, the comparators are different (middle column):

Text Attribute	Comparators	Example of value
Birth date	Is before	Jan 01, 1950
Birth date	Is after	Jan 01, 1940
Birth date	Is same day	Jul 30, 1947
Birth date	Is not same day	Mar 25, 1974
Birth date	Is between	Jan 01, 1900 and Jan 01, 1950
Birth date	Exist	*Means that the property is not empty*
Last name	Is missing	*Means that the property is empty*

2.4.2 Operators between conditions

A rule can contain one or more conditions. Conditions must be linked by one of the following operators: AND or OR.

If two conditions are linked by the AND operator, only the profiles that match both will validate the rule as true.

Example: the following rule will match all the profiles of visitors born between Feb 01, 1940 and Feb 01 1950 and contain the string "egger" in their last name.

If two conditions are linked by the OR operator, all visitors matching at least one of the two conditions will belong to that segment.

The following rule will match all visitors with Arnold as first name and have Governator as job title.

Nested conditions

Marketing Factory allows you to create very complex rules by defining multiple conditions (as previously seen) and also combine them into conditions blocks. It's also possible to combine condition blocks together by using the AND operator. To match the rule, visitors must match each block linked together by an AND operator. But inside the condition block itself, you can use either AND or OR operators.

Let's take a look at an example that's not to complex, but gives you a first impression on the possibilities you have to create powerful and complex segments, depending on your business requirements.

The visitor profiles that need to match the above rule can be described like this:

All visitors that have *Arnold* as first name AND have an interest score in Sport over 200,

AND

All visitors that have *Arnold* as first name AND have an interest score in over 100 and zip code in California

AND

All visitors that have *Arnold* as first name AND have an email address that contains "governator".

2.4.3 Negating conditions (exclusion)

The condition builder does not provide negation operators like "AND NOT" or "NOT" to create negative conditions or blocks of conditions. In fact, you don't need these type of operators, because you can define an exclusion at the condition level itself.

So if we want to select all the males that are not 30 of age we won't create the rule like this:

- gender =male

- o   AND NOT
- age = 30

But like this

- gender = male
    - o   AND
- age is not 30

By not implementing negation the conditions are easier to create and understand than if combined together with exclusions.

2.5   DATA COLLECTION AND SCOPE OF ANALYSIS

Marketing Factory has been designed to support working with several websites simultaneously and uses the notion of "collection and analysis scopes" to partition the data into separate logical entities. Scopes are automatically associated with websites through the administration interface of Marketing Factory. A web site is always associated with one scope, not multiple. The most important things to understand about scopes are:

- Each web site is associated with a scope.
- A scope is linked to one website.
- All visitors' profiles data are global to your Marketing Factory instance and are shared between scopes. This is intentionally, it means that the same person visiting different websites, that may (or may not) have different scopes, will be recognized as a unique individual, therefore avoiding fragmenting profile data. In the case of companies running tens or hundreds of websites, this is a major advantage.
- Every event collected by Marketing Factory is related to the scope in which it was generated. Practically that mean that the goals that are measured for one particular scope won't be seen and won't affect others.
- Unless shared on purpose segments and lists are created in a specific scope and can be used only within that scope.

2.6 SHARED SEGMENTS AND STATIC LISTS

As explained in the paragraph "Scope", Marketing Factory can be used on multiple sites at the same time while still maintaining a unique collection of profiles. Nevertheless, of different marketing teams being in charge of different sites within the company, brand or even different practices. Notably, if a company maintains several sites dedicated to serving different countries, the way to analyze or segment an audience may be very different for cultural or legal reasons, or by the way the marketing team decides to handle their market and customer base.

Let's consider the following examples. In France, the age of becoming an adult is at the age of 18, while it is 21 in the U.S. This is a significant difference in terms of promoting personalized content, e.g. what are you authorized to show, tell or sell. In India, the notion of "young persons" is certainly not the same as in Germany. In some countries, asking the gender or the age of a visitor may be very impolite while totally fine in other geographical areas or cultural groups. We could multiply those examples exponentially.

To solve this problem and allow different teams of marketers to use Marketing Factory in parallel on the same platform, **segments and lists can be shared - or not - between all sites**. By default, segments and lists are not shared among different web sites, meaning that each website (even in the same scope of analysis) will use only the segments or lists that have been created for them.

As a consequence, the team managing the India site will be able to define its own "young persons" segment with its own conditions, while the team working on the German site will be able to define its own version of the same segment. The first team can also decide to declare several segments that are specific to their market and that have no meaning for the German market.

If you want to share a segment or a list among all the sites within your platform and make both accessible to all the sites marketers only will have to check the "shared" checkbox present in the creation and edit forms of segments and lists.

Editing "Frenchies" segment

Segment name (required)

Frenchies

✓ Enabled   ☐ Shared

📄 **ATTENTION**

A shared segment or list is shared *completely*, it means that any marketing team that can use the segment can also modify it and redefine its scope, with consequences for all the other teams and their sites. Therefore, use shared segments and lists carefully.

3 AUDIENCE

In Marketing Factory, **audience** is the generic term used to designate your entire population of visitors, independently of being anonymous or identified. Each record of a unique visitor is called a **profile**. This chapter will explain the features and functionality available in the audience module of the software, as well as how to search and export selected profiles.

3.1 TO ACCESS THE AUDIENCE ENTRY PAGE

- Click on the arrow in front of the *Audience* entry. A submenu appears.
- Click on *Visitors*

3.2 AUDIENCE PAGE

When accessing the "audience" page, Marketing Factory provides a simple dashboard.

1. Some statistical information to see at a glance how your repository of visitors and your traffic is evolving.

   a. The total number of unique profiles collected.

   b. New visits to the site in the last 30 days. The absolute number and a % compared to the previous 30 days.

   c. Returning visits in the last 30 days. The absolute number and a % compared to the previous 30 days.

   d. Pages viewed in the last 30 days. The absolute number and a % compared to the previous 30 days.

2. Three tabs

   a. Manage visitors, which is the one selected by default.

   b. Contacts (and number of contacts).

   c. Leads (and number of leads).

3. A search field.

4. A menu to:

   a. Run an advanced search (by criterion)

   b. Run a feature to export profiles.

3.3 SEARCHING FOR PROFILES

Marketing Factory offers two methods to search in your profiles repository – Full Text and Advanced Search.

3.3.1 Full text search

This search option is accessible directly from the dashboard. Simply type the search term(s) you are looking for in the search field.

New Visits	Returning Visits	Page views
Last 30 days	Last 30 days	Last 30 days
18132	4993	87005
+ 9.42%	+ 12.03%	+ 10.36%

Search

The list of matching profiles is displayed in real-time under the search field as you type.

zin|

Zinedine Jeenner	in 13 hours	✏ ☰ 🗑
Zinedine Iniesta	in 11 hours	✏ ☰ 🗑
Zinedine Klum	in 9 hours	✏ ☰ 🗑
Zinedine Maldini	in 7 hours	✏ ☰ 🗑
Zinedine Henry	11 hours ago	✏ ☰ 🗑
Zinedine Bundchen	15 hours ago	✏ ☰ 🗑

Note that this search feature works on **all** profile properties, not only the name property or the ones displayed in the table. As a result, you may have to click on the profile details to see where the search term is being used and / or stored in the profile.

In the below example, the search term "paris" provides one result.

paris

| Heidi Bergkamp | 8 hours ago | ✏️ ☰ 🗑️ |

You can access the profile details (and edit them manually) by clicking on the edit icon.

If we select the profile details of the above example, we see that the visitor lives in "Paris" (city = Paris), which is why this profile appeared in the search results.

CONTACT INFO

E-mail

Phone number

Address

City
Paris

Country
France

Zip code
75016

SAVE   CANCEL

You can assign a profile to one or multiple lists by clicking on the list icon, which is more convenient than going into the profile page itself if you have multiple profiles to assign.

You can also delete a profile from the results list. Beware that this deletion cannot be undone. All data about this user will be completely lost.

In summary, the simple search is a powerful, convenient and very fast way to find profiles but is not very granular. To receive a more precise extraction of your visitors, you should use the advanced search.

📄 **NOTE**

The search feature is not case sensitive. Paris = paris = Paris = PaRis

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3.3.2 Advanced search

To do an advanced search (by criteria), click on the top right menu and choose "advanced search".
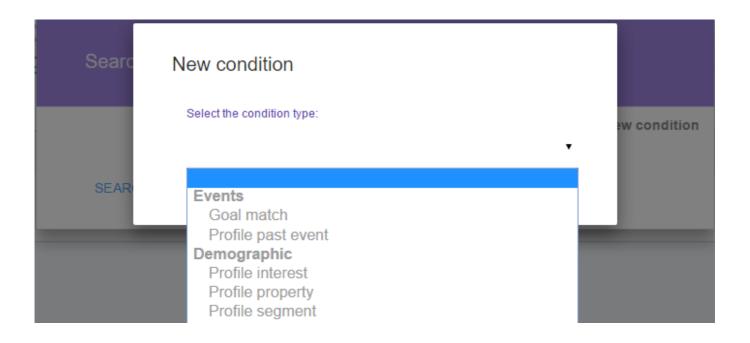
This opens an overlay window.

The advanced search works similar to the conditions builder.

First, click on *New condition* and choose the type of condition you want to request.

Search conditions in Marketing Factory are always divided into five categories to make your work easier:

1. Goals: all the goals you have previously created for your site or campaigns.
2. Past events: any navigation action the user may have performed on your site.
3. Profile interest: the fact that a specific "interest" has a certain value.
4. Profile property: any property that has been collected.
5. Profile segment: the fact that visitors belongs to one or several segments.

When the search has been launched, Marketing Factory returns the list of matching profiles and the following toolbox appears on top of the result list.

As soon as an advanced search has been performed, the search criteria apply until you decide to cancel the search. This means that if you go into the "Contacts" or "Leads" pages, Marketing Factory will provide the list of visitors in those segments that also match your search, so you do not have to re-define your search when moving from one page to another.

Using the search toolbox, you can:

1. Modify your search scope without re-typing everything (Edit search).
2. Create a new segments based on your search conditions (Save as segment). Just enter a name for this new segment (mandatory) and a description. To enable the segment immediately, leave the "enabled" box checked. To share the segment with other realms, check the box. (See the Chapter Segments for detailed information.)

3. Create a static list that will contain all the visitors returned by your search (Save as list).

Let's assume that we want to save all the new visitors where the first visit occurred in the month of June 2015. We would then do the following advanced search:

Then we save the result in a new list that we will be able to use later for a personalized drip campaign. Storing this search as a segment would not make much sense because, once the month of June is through, the list will always remain the same. (It is not possible to have a new visitor access the site in June 2015 once you are in the new month of July 2015.) Accordingly, a static list of all those visitors is much more appropriate. Click on "Save as list" to create the list.

TOTAL VISITORS: 16511

New Visits
Last 30 days

18175

+ 11.37%

Page views
Last 30 days

87176

+ 12.37%

There is an ongoing search

el search

Save as list

Name (required)

June 2015 new visitors

Description

First visit 2015-06

☐ Shared

CREATE   CANCEL

Search

Andrea Beckham   4 hours ago

Johan Banks   12 hours ago

Give a name to the list and a description, then click on CREATE.

4. Remove all search filters currently active (Cancel search).

3.4 EXPORTING PROFILES

At any time, you can export visitor profiles into a convenient CSV format. This format can be opened in Microsoft Excel® or similar spreadsheet editors. It can be imported by default into nearly every third-party system you may want to use, such as: databases, mail automation and newsletter systems, CRM, ERP, etc.

To export ALL profiles, follow this procedure:

- Click on the Visitors page entry in left menu. (Display the default audience page)
- Click on the upper right menu. (Display a sub-menu)
- Choose "Export". (The download starts)

The export feature is contextual to the current search scope. If you have an on-going search, then only the profiles found for this search scope will be exported. This is true both for simple search (full text) and advanced search (criteria).

Also, if you go into the Contacts page or the Leads page, the export feature will apply only to the visitors that match the contact or lead conditions.

3.5 CONTACTS AND LEADS TABS

Contacts and Leads pages, accessible by clicking on the top bar tabs (blue-green background) display subsets of your entire audience that match a predefined criteria.

By convention, Marketing Factory divides your audience into three categories:

1. **Visitors**: all the visitors who came at least once to your site. Obviously, this population can be very large with lots of nearly empty profiles, fake profiles due to spammers or automated bot visits.

2. **Contacts**: this refers to the visitors on whom we have collected at least one data point that allows you to start a direct conversation: email address, telephone, address, Facebook ID, LinkedIn ID.... even if you do not have the visitor name.

3. **Leads**: are the contacts that have been assigned to someone responsible for engaging with the contact, usually in a sales process.

Note that for each of those profile groups, Marketing Factory tells you how many matching profiles are stored in the profile repository.

As a matter of fact, contacts and leads are nothing else than **pre-built segments** shipped within Marketing Factory. They respect conditions that can be fully customized by the user.

Contacts and **Leads** pages provide more details than the default *visitors* page because more data has been collected about visitors belonging to these groups.

3.5.1.1 Using the tools above the list of profiles

You can:

- Search in the list of contacts or list of leads by using the search form. The search is a full text search over all properties. The list is updated in real-time as you type.
- Change the number of records displayed in the page (which is 10 by default).
- Change the columns that are displayed. A click on the ▦ icon brings up the list of available properties.

Check or uncheck the properties you want to display in the table.

The changes occur in real-time so you can check / uncheck several items.

Finally, click outside of the drop-down menu to see your screen, which can be very different from its original state.

MARKETER GUIDE

MARKETING FACTORY 1.6

ID ▲	Nationality ⇕	Gender ⇕	Email ⇕	Phone number ⇕	City ⇕	Age ⇕	Actions
Franz Henry	Austria	female				44	✎ ≣ 🗑
David Ambrosio	France	male				45	✎ ≣ 🗑
Gerd Delevingne	Austria	male	doutzen.henry@test.com			33	✎ ≣ 🗑
Tyra Jeenner				001-202-555-7637			✎ ≣ 🗑
Kendall Ronaldo	Switzerland	female		001-202-555-8822		40	✎ ≣ 🗑
Christiano Swanepoel	Switzerland	male				92	✎ ≣ 🗑
Candice Klum	France	male				38	✎ ≣ 🗑
Christiano Crujff				001-202-555-1477			✎ ≣ 🗑

> 📄 **NOTE:**
>
> this column selection is not persistent and will be lost if you leave the page.

4 VISITOR PROFILE

Profiles are at the heart of Marketing Factory, displaying all the information collected about a visitor in a single place:

- User specific properties (name, age, gender, job, etc.).

- User past behavior (achieved goals, visits, pages viewed, etc.).

- Details about each visit context (location, device, etc.).

- Implicit profiling information (using interests, scoring methods, etc.).

Obviously, after just starting to use Marketing Factory, profiles will be mostly empty; then, based on all the data collection initiatives you will implement (form mapping, interests, goals, etc.), those profiles will grow in quantity and quality. As a digital marketer, your objective should be to have a 360° view of your visitors. Once you defined all the necessary properties to define the holistic view of a visitor, constant visits to your site will ensure the continuous profile creation and update.

4.1 HOW PROFILES WORK

By default, a visitor profile is updated automatically and silently by Marketing Factory as soon as the visitor reaches a page of your site and navigates around your website(s). For each page visited, Marketing Factory will collect the classic information like page url, date, time, IP, etc.

However, Marketing Factory will also collect:

1. Goals achievements
2. User interest (if interests are declared on the webpages)
3. Internal searches that are performed
4. Data submitted through forms (with Form mapping in place)
5. Any other data marketers will want to store based on custom integration

The visitor profile can also be updated manually. At first, this may seem strange but it is very convenient if you intend to put in place a mixed online / offline usage of Marketing Factory, let for instance people that are in contact with visitors (e.g. support team, sales, etc.) access and enrich those profiles.

Last, but not least, the user profile can be updated programmatically using an API. This means that you can retrieve and store data coming from other systems not directly using Marketing Factory. These cases in which you use the REST API to integrate with 3rd party systems is beyond the scope of this user guide. These types of integration project will require your IT team to be involved.

But the most important fact to remember is that every piece of information stored in the visitor profile can be re-used nearly everywhere within Marketing Factory:

- To search and filter in the profiles repository,
- To build conditions in segments,
- To build conditions in personalization,
- To sort and export visitors,
- To create traffic and conversions analysis.

4.2 PROFILE PAGE EXPLAINED

The profile page is composed of several sections.

4.2.1 Identification

The first part of the profile provides the main information collected about the visitor.

- The visitor picture - if Marketing Factory is able to find it. Currently, Marketing Factory tries to find profile pictures from Gravatar; we are planning to search pictures on social networks as well soon.
- The total number of visits, including the date of the first and latest visit.
- First name, last name and nationality.
- The visitor's gender.

The "Assigned to" block allows you to make that profile a LEAD (see previous chapter) by assigning him or her to someone in your organization, which can be designated by a name or an email.
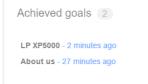
4.2.2 User access

This sections show on a graph the history of visits and pages viewed by the visitor. The timeline can be refined by using the date pickers at the top-right of the graph. By default, the timeline is displayed by months but you can switch to a by-day view if you need more precise information.

4.2.3 Achieved goals
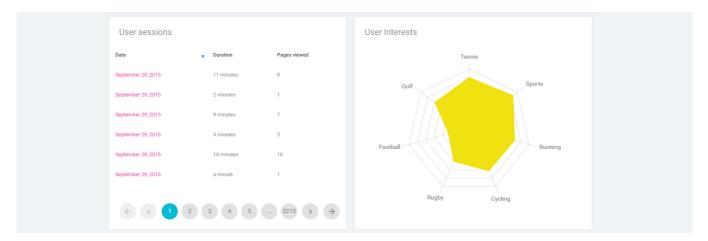
This section lists all the goals for which the user has converted. This information is critical as it is often a basis for marketing automation campaigns or for effective personalization. Example: if the user has converted the goal of "basic training", the next step would be to push the "advanced training" offer.
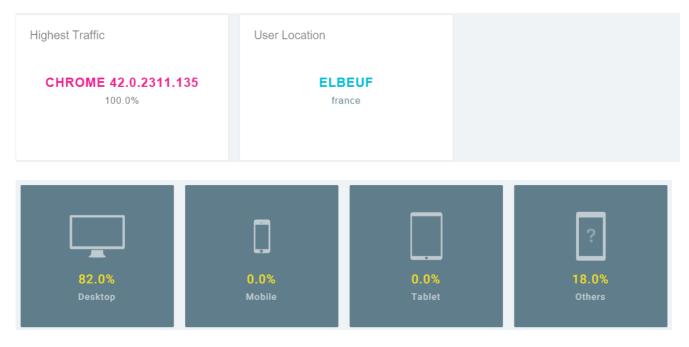
4.2.4 User history and interests

This section provides, on the left side, the complete list of visits (sessions) with the duration for each visit and the number of pages seen. Click on a session to access a more detailed report.

The right side displays a graphic that represents the profile diagram, drawn by collecting the different interests and value points attached to those interests while the visitor navigated your website(s) (see the chapter Interests to know more about interests).

4.2.5 Visits context statistical report

This section gives you an aggregated view of the contextual data Marketing Factory has gathered when recording each visit. Obviously, the context of a visit can differ from one visit to another (for example, the user changes his browser, his device, visits from a different location, etc.) in which case Marketing Factory gives a statistical report.

- Highest traffic: the browser that is the most used by the visitor.
- User location: the most frequent location from where the user visits the site.
- For the devices, Marketing Factory provides a detailed breakdown by type of device.

4.2.6 Contact information and social networks

CONTACT INFO

E-mail	City
gigi.jeenner@gmail.com	London
Phone number	Country
001-202-555-5229	UK
Address	Zip code
91, thurleigh road	SW12 8 TT

SAVE   CANCEL

Facebook
https://www.facebook.com/gigi
SAVE   CANCEL

LinkedIn
https://uk.linkedin.com/pub/gigi-jeenner
SAVE   CANCEL

Google Plus
https://plus.google.com/u/0/+gigijeener
SAVE   CANCEL

Twitter
SAVE   CANCEL

This section structures all the contact information to get in touch with the customer, online or offline. Note that the "contact info" part is provided with the default and standard properties (address, city, zip code, etc.) but can be extended without any IT involvement. See the paragraph "extending profile properties" below.

4.2.7 Other info

This section structures all other fields of information that have been collected. Note that new properties can be added without any IT involvement. See the paragraph "extending profile properties"

4.2.8 Classification

This section allows you to see which segments and static lists the visitor belongs to. As the segments are resolved automatically based on their conditions, it is purely informative. As

belonging to a list is an arbitrary decision, marketers can immediately add or remove the visitor from lists using the top-right menu.

4.3 USER SESSION DETAILS

Each visit (session) can be viewed in detail.

USER SESSION

Date October 26, 2015
Last event date October 26, 2015
Duration a minute
Page views 7

Others	Browser	User Location
?	CHROME 42.0.2311.135	

Events

Time	▲	Event info
		Viewed page : http://rqa11.jahia.com:9081/dftrunkwas/sites/ACMESPACE2/home/events.html
After a few seconds		Reached goal : LP XP5000
After a few seconds		Viewed page : http://rqa11.jahia.com:9081/dftrunkwas/sites/ACMESPACE2/home/news.html
After a few seconds		Viewed page : http://rqa11.jahia.com:9081/dftrunkwas/sites/ACMESPACE2/home/events.html

4.4 EXTENDING PROFILE PROPERTIES

In the contact info and user info sections, there is a contextual menu available. This menu allows you to declare and create new properties or show actions assigned to these properties.

The *Show actions* refreshes the block and displays a little cross-mark, or X, before each property allowing to remove the property from the profile. This does NOT delete the stored properties – it simply removes it from the visitor's profile view.

The *New Property* choice displays an overlay form.
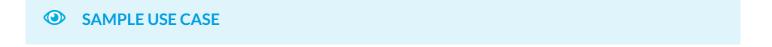
Add property

Property ID (required)

privateinsurance

Property name (required)

Private insurance

Property type

Text ▼

SAVE   CANCEL

1. Give the property an ID. Only letters are allowed - no punctuation marks, spaces or numbers.

2. Give the property a display name. You can use all types of characters.

3. Choose a property type.

4. Save.

Work ⋮

Company

Job title

Income

Sector

Private insurance

SAVE   CANCEL

Instantly the visitors' profile is updated, the new property is displayed in the block and is instantly usable so you can either edit values manually or collect data from mapping with a form or some other automated collection tools.

👁 **SAMPLE USE CASE**

Mark is a marketer who wants to understand his customer's buying triggers and responses to his company's marketing messages. Thanks to Marketing Factory, he has infinite drill-down capabilities to understand an individual's behavior when shopping in a grocery store.

The customer enters the grocery store with his phone, on which is a mobile app for the store. Mark can see when the customer entered the store because the mobile app detected the customer passed by an entry beacon and sent a notice that the customer had entered the store.

Mark can track the customer through the store based on electronic beacons that 'talk' to the mobile app. He sees that the customer went into the non-alcoholic beverages aisle for a few minutes (which the mobile app / server connection verified by sending multiple notices to the beacon in that section) (step two).

Then the customer went to the alcohol aisle where a third beacon detected the customer's presence, and alerted Mark's system (step three).

In that same aisle, there is digital signage powered by an Apple TV that displays commercials for alcohol beverages in a continuously-running loop. The server that Mark's software uses associates beacon events in that area with interest in alcohol and non-alcoholic beverages and, when those interests reach a certain pre-defined level, it sends a notification to the digital signage to display a personalized message to the customer that he can use an online service to have his drink purchases delivered directly to his home instead of carrying them and that he should check his phone (step four).

At the same time, the customer receives a notification on his phone that directs him to the online store to purchase his drinks (step 5).

Throughout this customer's experience, Marketing Factory has been receiving events about the customer, executing rules based on those received events, updating the customer profile to better personalize his shopping experience. Mark has the data he needs to know his customer better. And all this personalization for the customer happened without the customer putting anything in his cart!

5 INTERESTS AND USER PROFILING

Being able to draw a meaningful portrait of visitors based on what they have done or seen and then refining the progressive profiling with each visit until you are able to engage via a personalized conversation, without bothering the visitor with direct questions, is one of the main dreams for marketers. That is what Marketing Factory allows marketers to do with the **interests** feature.

With Marketing Factory, you can assign **interest tags** on your content pages and assign them a value (or scoring weight) to each interest tag you are applying. These interests are collected and stored in the visitor profiles as they navigate through your pages, silently creating a comprehensive profile.

This chapter describes how the **interests** mechanism work and contains step-by-step instructions to assign interests tags. Finally, it provides some examples of usage and best practices recommendations.

5.1 INTEREST DEFINITION

In Marketing Factory, an interest is defined by a string (one or several words) and a numerical value (the weight).

5.2 WHAT IS THE INTEREST OR INTERESTS?

The "interests" mechanism allows you to perform an implicit classification of your audience and define certain characteristics based on what the visitors have seen. For instance, defining whether

a user is more interested in technical or marketing content, if he is interested in a certain type of products versus another, a certain look and feel, etc.

5.3 HOW INTERESTS ARE COLLECTED?

Whenever a visitor hits a page that contains one or several interests, Marketing Factory stores this information into the visitor profile.

If the interest does not exist yet in the visitor profile, Marketing Factory will add this entry and the scoring weight value defined in the visited page. (By default, the value is 1)

If the interest already exists in the visitor profile, Marketing Factory will simply add the weight value of the current page to the existing total already stored in the profile.

5.4 ON WHAT CONTENT CAN INTERESTS TAGS BE APPLIED?

Interests can be applied on **pages** . In Digital Experience Manager, a page with all its content is not a single object but a collection of multiple items. When a visitor views a page, Marketing Factory will collect the interests' values that are assigned to that page (the item identified in the URL and displayed as a page) but not all the values for all the items that compose the page.

5.5 IS THE LIST OF INTERESTS IMPOSED OR LIMITED?

Marketing Factory provides a feature you can use the way you want, depending on your needs and particular strategy.

- The software does not impose its own schema of analysis nor its own pre-defined list of interests and does not limit the number of interests you can use on your site.

- Marketing Factory does not need you to prepare in advance a list of interests or pre-declare them to be able to flag your site pages. In fact, the interests feature is the most agile you can find on the market today.

5.6 ASSIGNING AN INTEREST

As interests must be applied on pages, this operation is done directly in Digital Experience Manager *Edit Mode.*

Select a page in the site tree and right-click > Edit.

Or select an item inside a page that does not appear directly into your site map but can be rendered as full page like, for instance, a news item.

In the form dialog that appears, activate the interest section by checking the box.

The section expands:

Click the "Add" button. A line appears. Simply type the name of the interest that Marketing Factory will collect if a visitor comes to that page.

If you do not specify a value, Marketing Factory will assume that the value is 1.

To give a higher weight to the interest, simply add a colon followed by the numeric value you want; for example, Tennis:5.

You can add as many interests on a given page as necessary by repeating the procedure.

Save the edit dialog at the end.

You must publish your page(s) to start collecting interests you have declared. Marketing Factory does not need any other setting or configuration; it starts to collect the interests as soon as they are available in pages that are accessible to visitors.
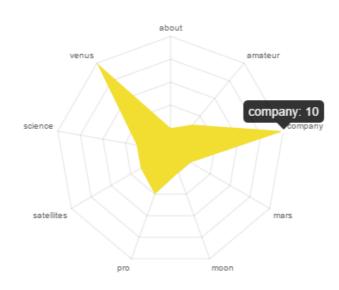
5.7 VIEWING INTERESTS IN THE VISITOR PROFILE

In any visitor profile page, you can see a section named "User Interests".

That section shows a graphic with the eight most important interests of this visitor. Thanks to this graph, you can see the visitor profile portrait at a glance.

By hovering your mouse over the different interests, you can see the number of points collected for each of those interests.

5.8 INTERESTS COLLECTION CONSISTENCY

For consistency reasons, <u>interests are collected only once per page and per visit</u> (session). This rule applies to avoid distorting profiles with non-relevant behaviors, such as automatic page refresh or users coming back during this navigation session not because they have a particular interest but for a simple navigation purpose. By eliminating this "data noise", the results are much more relevant because if a visitor comes back later to re-visit your site and goes on pages he has already seen during his previous visits, chances are that there is a particular interested in them.

5.9 HOW TO USE INTERESTS?

1. Interests can be used as conditions for personalization.
2. Interests can be used as conditions for segmentation.
3. Interests can be used as conditions for user extraction.
4. Interests can be used for automation. If interest A is higher than X (where X is a figure you choose), then send an email to a sales representative. If interest B is higher than X, then assign it to a list. If interest C is higher than X, then copy this data into Salesforce, etc.

☰ **ADVICES**

Use marketing personas

When building your site, if you use personas, try to define interests that match with those personas. As a result, tagging your site will be much easier for content authors.

Start soon

The sooner you apply interests on your content, the better for building more robust profiles. It can be very work-intensive to have to come back to apply interests on each page later.

Start small and grow.

Start with few interests (4 to 6 maximum) and apply those on your pages. Let the visitors navigate on your site for a few weeks until you have a more comprehensive view of your audience before adding new interests or concepts if it is really necessary. It is better to have only three interests and be able to use them as effective personalization criteria than starting with dozens and being incapable of maintaining them correctly.

Define a scale of notation and share it with all co-workers.

In order to have consistent evaluation of the visitor's interests, you should define a scale of weight that is shared with all your collaborators. At the very least, you should define a maximum weight; otherwise, the risk is that a visit to one single page that is over-weighted may completely unbalance your visitor profiling. Usually, the deeper a page is in your site tree, the more weight it should have (because the user had to navigate to that page and demonstrate an obvious interest for the topic in this page). Also, the more dedicated a page is to one topic, the more weight it should have as well. On the contrary, the top level navigation pages should not have any interest declared or should have interests with a low weight, *unless* your site structure is really relevant from the start level. Obviously, your home page should not have any interests because coming to this page does not reveal anything yet about what the visitor is searching for nor his interests.

👁 SAMPLE USE CASE

A basic scenario

Marc is a digital marketer working for a home improvement company. The company sells tools and its online catalog is organized by lines of products (drills, hammers, saws, etc.). However, the company has items for both, professionals and amateurs and Marc would like to push relevant offers to both segments. Using Marketing Factory, Marc decides to flag his products with two interests - "amateur" and "pros" - ranging from 1 to 5 points as a weight factor depending on the technical difficulty of the product. He also flags the video pages available on his website: DIY videos are flagged "amateur" with a high score, while technical demonstrations of the products are flagged "pros" with a medium score. After two weeks, Marc is able to personalize his home page, offering a special rebate to amateurs and even to amateurs who have already been on the "jigsaws" page at least twice (because he has a full inventory to sell before a new model is launched). At the same place in the site, if the visitor is a professional with a score higher than 15 points, Marc decides to push an invitation to become a registered partner.

An advanced scenario

Julie is a digital marketer for an online store selling beauty products only for women. Using Marketing Factory's reporting features, she already noticed that 15% of her visitors are male and that, surprisingly (or not), they look at more pages than women. Julie suspects that they are coming to the store to buy a gift but are lost between the different products they do not really understand. Using the interest feature, she decides to apply the following tags on her pages "perfumes, skin care, lipsticks, makeup, nail polish".

Then Julie decides to create a personalized experience to push content specifically written for the following occasions: how-to choose a perfume for a gift, how to choose a lipstick, how-to choose a skin care, etc.
For each variant she creates a personalization rule to push the appropriate content to the visitor if he matches the following conditions:
gender is male
has already done 2 visits
he has seen more than 12 pages
his interest in … is > 30 (here the interest is different for each variant)

Thanks to that personalization Julie is able to convert male buyers much more efficiently, guiding them to the right product or product type when previously she had a high percentage of males leaving the site without doing any transaction.

The two examples above show how the interests feature can be used in very different contexts and used to profile visitors from a completely different perspective.

6 GOALS

A goal is a specific action that visitors can do on a website that marketers want to monitor and, thus, have declared on purpose.

Goals may be used to:

- Monitor performance of certain strategic parts of a website. Setting goals in Marketing Factory is more easily done than found in a traditional analytics system.

- Understand in-depth who does what, how different types of users react to a certain goal, how their behavior can be different from other segments of the audience. Ultimately, the objective in doing such analysis is to optimize the site for each part of the audience.

- Trigger engagements, which allows marketers to go further in the personalized discussion. This means they need to store the information that a goal has been reached to start the next phase of the conversation.

6.1 OVERVIEW

Goals are particular activities that marketers want their visitors to achieve on their site(s) because they are directly related to your business objectives or significant to evaluate your site performances (or KPIs).

On the technical side, goals are always related to one of the three following events:

1. A page hit (an element has been requested by the visitor and returned by Digital Experience Manager).
2. A click (the visitor has clicked on a link or an element in the page).
3. A form submission (the visitor has submitted a form).

To make applying goals more effective, the Marketing Factory GUI encapsulates this technical distinction behind a more functional approach.

Goals can be defined at the site level (*site metrics* entry in the left menu) or for a particular campaign. In both cases, the goal types available are the same, as well as the way goals are created, the data collected and the reports provided. The differences lie in:

1. The duration. A goal defined at the site level is "permanent" (until manual deletion), while a goal defined in a campaign is active only for the duration of the campaign. When the campaign reaches its end date, Marketing Factory stops storing the events of this goal.

2. The filtering of the audience. All visitors achieving a goal are counted if the goal is defined at site level, while visits can be filtered in the case of a campaign (e.g., only users coming from a paid ad); therefore, the goals reports will not show all the possible successes but only the one targeted by the campaign settings.
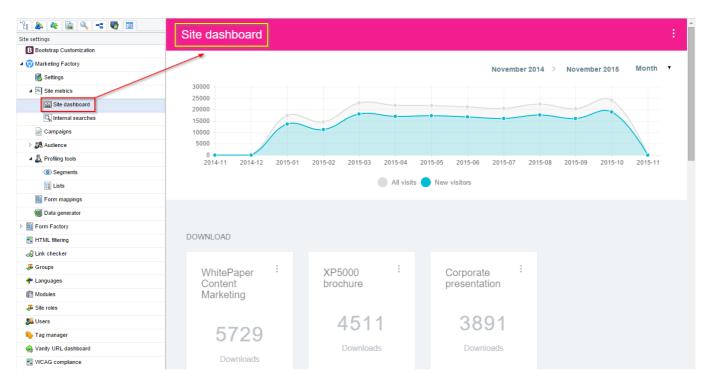
A goal is generally defined by an entry condition, which defines what demographic segment Marketing Factory should use to perform calculations plus an end point, which is the fulfillment of the goal itself. Based on those two elements, Marketing Factory can calculate - in real-time - the success rate of your goal which is called a 'conversion'.

6.2 ACCESSING GOALS

Goals can be found in the Site dashboard entry of the left menu

Or in a campaign dashboard

6.3 TYPES OF GOALS

In Marketing Factory version 1.0, there are six types of goals that can be tracked:

1. Page visits
2. Funnels
3. Landing pages
4. Downloads
5. Videos
6. Forms

Let's review each type of goal, the data Marketing Factory is storing and how some calculations are performed.

6.3.1 Page visits

This goal simply counts the number of visits including a specific page. A conversion rate is calculated by comparing the number of matching visits with the entire number of different visits on the site. The conversion rate may not be of critical interest but it does give an idea of how "popular" this page is.

6.3.1.1 Calculation

Conversion = (number of visits including target page) / (total number of visits)

6.3.1.2 How to create a page visit goal

1. Go into the site metrics dashboard or to a campaign.
2. Choose *Create new goal*.
3. Select the goal type *Page visit*.
4. Fill the *goal title* (mandatory).
5. Fill a *goal description* (optional).
6. Fill the *URL of the page* (mandatory).
7. Save.

6.3.2 Landing page goal

This goal measures the number of visitors starting their visit (or user sessions) by visiting a particular page (hence, the term "landing page") and calculates a conversion rate based on the number of people that achieve a particular action (a visit to another page or a form submission). Incidentally, these are the two most common actions marketers want their visitors to do when building landing pages.

Landing page goals can be seen as a very simple type of "campaign" (see next chapter). They are faster to set-up than a complete campaign but offer fewer capabilities.

6.3.2.1   Calculation

Conversions: (number of visits started by landing page which reached the success goal / number of visits started by the landing page) * 100

6.3.2.2   How to declare a landing page goal

1. Go into the site metrics dashboard or in a campaign.
2. Choose "Declare new goal type" > "landing page".
3. Fill the goal title (mandatory).
4. Fill a goal description (optional).
5. Fill the landing page url (mandatory).
6. Fill the success page url (mandatory).
7. Save.

6.3.3 Funnel goal

The funnel goal allows you to define two pages - one being the start page, and the second being the end page. A conversion occurs as soon as a visitor who has entered the start page also reaches the end page.

Note: this goal is very similar to the Landing page goal, with the main difference being that landing page goals are limited to entry pages of your site (the first page of the user session). The

distinction between both goals is done more for ergonomic reasons (to more rapidly find your goals) than for functional or technical ones.

6.3.3.1   Calculation

Goal conversions: (number of visits with start and success page) / (number of visits with start page)

6.3.3.2   How to create a funnel goal

1. Go into the site metrics dashboard or in a campaign.
2. Choose "Create new goal " > "landing page".
3. Fill the *goal title* (mandatory).
4. Fill a *goal description* (optional).
5. Fill the *Start page url* (mandatory).
6. Fill the *End page url* (mandatory).
7. Save.

6.3.4 Video goal

Marketing Factory is able to track how your videos perform on your website, by measuring how much time a video has been launched.

6.3.4.1   Calculation

Conversion: number of visitors having started the video / number of visitors having seen the page containing the video

6.3.4.2   How to declare a video goal

1. Go into the site metrics dashboard or in a campaign.
2. Choose "Declare new goal".
3. Choose goal type (dropdown list) > Video.

4. Give a name to your goal and the URL of the video.

5. Save.

6.3.4.3   Limitations

As of today, Marketing Factory works with standard HTML 5 video players. Note that if using custom players the start event on videos may not be correctly recognized.

6.3.5 Download goal

This goal simply counts the number of visits in which a particular file asset has been downloaded. There is no conversion rate as there is no trustworthy and meaningful method to count how many visitors have been presented with the asset as a downloadable item. (The same item can be downloaded from multiple places, the download can start automatically or after a form submission, etc.)

6.3.5.1   Calculation

No calculation. Provides an absolute number of visits including at least one download of the target file.

6.3.5.2   How to track a download

1. Go into the site metrics dashboard or in a campaign.

2. Choose "Declare new goal type" > "Asset".

3. Give a name to your goal (mandatory).

4. Fill a description (optional).

5. Fill the URL of the asset (mandatory).

6. Save.

6.3.6 Form goal

This goal counts the number of visitors that have opened a page containing a form and those who have submitted the form.

6.3.6.1 Calculation

Conversion: number of visits including at least one submit of the form / total number of visits

6.3.6.2 How to declare form submit goal

1. Go into the site metrics dashboard or to a campaign.
2. Choose *Create new goal*.
3. Select the goal type *Form*.
4. Fill the *goal title* (mandatory).
5. Fill a *goal description* (optional).
6. Fill the *URL of the page* or select the page using the page picker

---

‹ Create new goal

Goal name (required)
Contact form

Description
Test goal

Goal type
Form ▾

Form page path (required)
Show the page picker

SAVE CHANGES   RESET CHANGES

---

7. Type the form Name or select it with the visual picker (an overlay show the page previously selected, click in one of the forms fields to select the form then press OK).

8. Save.

6.4 GOALS DASHBOARD

Marketing Factory provides, in the **Site metrics** panel or in each **campaign** dashboard, the essential data for each of the goals you have defined.

Goals are structured by type in order to make them easily searchable.

For each goal, Marketing Factory provides:

- The number of people engaged (if relevant).
- The number of people who completed the goal.
- The percentage of success (if relevant).

Those figures are displayed for the time period currently selected in your dashboard.
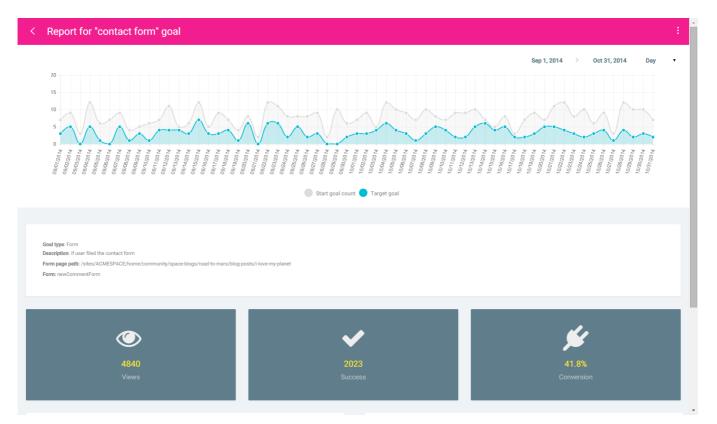
📄 **TIP**

Do not create hundreds of goals and do not try to use Marketing Factory as a substitute to a dedicated analytics system - it has not been designed for that. You can certainly set page visit goals to get some traffic data immediately accessible and avoid constantly going to an external system, but monitoring your traffic should remain the role of your analytics engine, whichever one you use.

6.5 GOALS DETAILS

If you click on a goal in the dashboard, Marketing Factory will show detailed information about your goal(s) performance.

The **timeline** provides an immediate view of the level of activity for this goal. Depending on the type of goal, there can be one or two curves. Remember that you can refine the scale of time by using the date pickers. The scale of the graph will adapt accordingly to the elements selected.

In addition Marketing Factory provides absolute numbers about the **population that has been qualified** for this goal, as well as the **population that has achieved** this goal.

Finally, Marketing Factory provides the **conversion rate** (where applicable), which is the % of visitors who have reached this goal versus the total population qualified for this goal.

For instance, if you set a **form goal**, the population qualified is the total number of visitors who have reached the page containing that form and the population who has reached the goal is the total amount of people who have submitted the form.

6.5.1 Detailed Analysis

In the goal report the Quantitative analysis and the Performances analysis tables are displayed that allows to dig into the results. The way these reports work is explained in the Concepts chapter.

6.6 HOW TO USE GOALS

Declaring your goals in Marketing Factory is not only useful to get performance statistics. You can also use goals or, more precisely, the fact that a visitor has reached a goal as a condition for personalization.

6.6.1 Goals and segments

The fact that a visitor has achieved a goal, or has not achieved a goal can be used as a condition to define a segment. Examples: visitors that has not achieved the goal "download white paper", visitors that has reached the goal "product demo video"

6.6.2 Goals and personalization

Goals can be used to define a personalization and push relevant content at any time.

7 CAMPAIGNS

A campaign is a marketing initiative, online or offline, which has the purpose of bringing people to a website and, usually, motivating visitors to execute a specific action. Marketing Factory allows you to define your campaigns and then monitor how they perform, do in-depth analysis of the visitors who were attracted by these campaigns and actually performed the expected action. Marketing Factory lets you determine which campaigns are the most successful ones and generate the higher return on investment (ROI).

You can specifically target visitors who are reacting to a campaign and execute personalization, testing or other marketing-oriented tasks.

7.1 HOW CAMPAIGNS WORK

A campaign is a marketing initiative you have launched to bring visitors to your website. This initiative can be online: a drip campaign by email, rotating banners on web sites, paid keywords, a

social post on Facebook, etc. It can also be an off-line initiative: TV or paper ads, printed product brochures or catalogs, QR Codes on POS material, Smart Tags, direct mail or even street-marketing actions.

Whatever the attraction mechanism is, the objective is to motivate a prospect to click on a link or CTA (if it is an online campaign) or, later (if the campaign is off-line), to type an Internet address that will bring them to your website. To be able to measure the efficiency of a campaign, the first critical key is to identify the fact that those visitors are coming because of your campaign.

7.1.1 Identify visitors

First, Marketing Factory needs to identify visitors that have been exposed to your campaign so it can start counting and monitoring them correctly. People identified as coming because of a campaign are considered "**engaged**".

To assert that visitors are coming to your site because of one of your campaigns, there are two main cases:

1. Your campaign has been designed to send visitors to a specific address (URL) that is (normally) not accessible with standard navigation, like a specific landing page, but - apart the fact that people access this page - you do not have more details. That is usually the case with print marketing, street marketing and any other types of off-line campaigns when visitors cannot click or activate a link.

2. Your campaign brings people to your website, to a dedicated or not dedicated page (like your home page or a campaign related product page) by following a link, which provides an identifier that allows you to know that they are coming because they have been exposed to your campaign and clicked on that particular link. This is the case for most online initiatives, like: Google ads, banners, etc., but also for off-line marketing actions if you are using smart tags, beacons or QR codes, for instance.

7.1.2 Campaign Primary Goal

The goal of a campaign is to not only make people come to your site, or even to increase your traffic, but to really engage with them more deeply and start a conversation. Then, once they have arrived on your website, you will want them to perform a specific action that will increase their likeliness to become buyers or brand advocates. Those actions can be, for example, to download a white paper, register for an event / conference / webinar, fill out a contact form, look at a video, ask for a sales representative call, etc.

In Marketing Factory, this very specific action is called the **Primary Goal**. The number of visitors that react to your campaign and perform the intended activity (we call that engage with the primary goal) defines the success of the campaign.

7.1.3 Campaign secondary goals

The results of a campaign (conversion rate, cost per converted visitor, etc.) are calculated based on the Primary Goal – that is the absolute measure of success. Nevertheless, you may want to add other goals to your campaign in order to track how many visitors are engaged in this campaign their performance compares to these secondary goals.

Goals in a campaign are created and work exactly like goals for your site metrics (see the chapter Goals and the chapter Concepts for detailed information about the reporting and analysis capabilities). The only difference is that only people engaged in your campaign will be considered for the statistics. If, for instance you run a campaign based on Google ads that brings visitors to a page named "Our new XP5000 mobile phone", and if that page is accessible from your standard site navigation, you will have visitors coming because of your campaign AND people that came to your site and to this page without being exposed to this campaign. By setting a goal for this page visit in your campaign dashboard, Marketing Factory will show you the statistics only for those people that have been identified as engaged in your campaign.

7.2 CAMPAIGNS DEFAULT PAGE

The campaigns default page lists all campaigns by date of creation and provides critical information about each campaign like the number of engaged visitors and the conversion rate.

Name	Type	Description	Begin	Finish	Engaged profiles	conversion Ratio	Nb of goals	Actions
Google keywords "roaming"	Parameter in URL campaign		March 1, 2015	May 1, 2015	83	4.80%	1	
Offer for students only LP	Landing page campaign		March 1, 2015	May 1, 2015	0	99.70%	1	
NYTimes co-branded homepage	By referrer campaign		March 1, 2015	May 1, 2015	83	4.94%	1	
XP5000 LP for cable TV	Landing page campaign	Page dedicated for TV ads	June 1, 2015	October 25, 2015	172	99.88%	1	
Wikipedia	By referrer campaign	All visitors coming from our wikipedia page	June 1, 2015	October 25, 2015	7448	5.17%	1	
XP5000 google ads	Parameter in URL campaign		June 1, 2015	October 25, 2015	7427	5.26%	1	

The buttons in front of each campaign, can be used for:

Accessing the campaign dashboard.

Seeing the list of engaged visitors.

Delete a campaign. Beware that this deletion is permanent and cannot be undone. All data collected about this campaign will be lost forever.

7.3 CREATE A CAMPAIGN

To create a campaign, follow this procedure:

1. Click on the "Campaign" entry in the left menu.

2. Click on the top-right menu.

3. Choose *Create new campaign*.

4. Give your campaign a meaningful name (Mandatory).

5. Give your campaign a meaningful description (Optional, but recommended).

6. Enter the amount spent (Optional).

7. Set a start date.

8. Set an end date.

9. Save.

The form disappears and the list of campaigns is refreshed. Your new campaign should appear inside.

Once your campaign has been created in Marketing Factory, you can add campaign goals. The goals created in the context of a campaign work exactly like goals declared for your website, except that only the subset of visitors engaged in your campaign will be taken into account.
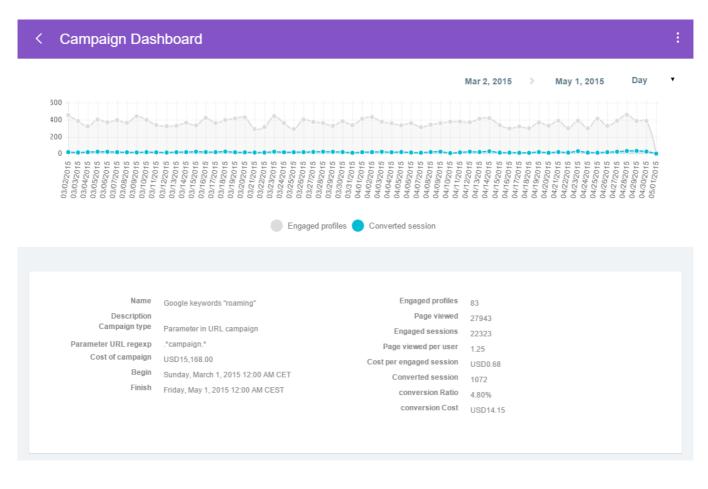
7.4 CAMPAIGN DASHBOARD

The campaign dashboard provides a detailed view of how your campaign perform.
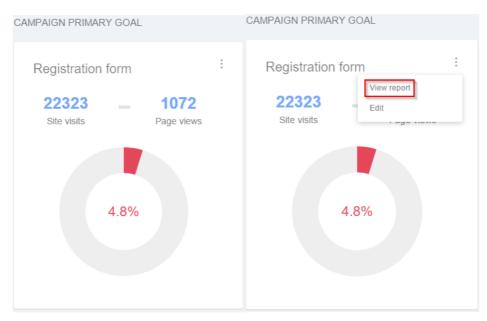
The first section is the timeline showing the number of engaged visitors and the number of conversions:
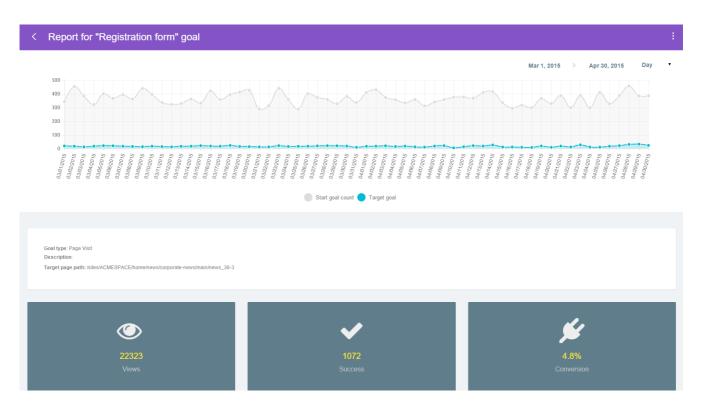
7.5 PRIMARY GOAL RESULTS

As for any goal in Marketing Factory, you can access a detailed report of that goal using the top-right menu and choosing *View Report*.

And then access the quantitative and qualitative analysis of visitors who achieved that goal.

Quantitative analysis

Filter on: Gender ▼

Gender	Success	Percentage
female	443	41.32 %
male	432	40.3 %
Not provided	197	18.38 %

Performance analysis

Filter on: Gender ▼

Gender	Views	Success	Conversion
female	9339	443	4.74 %
male	9204	432	4.69 %
Not provided	3780	197	5.21 %

For detailed explanations about analysis capabilities, please refer to chapter 2 "Concepts".
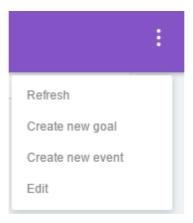
7.5.1 Update the campaign

Using the top-right menu:

You can:

- Refresh the campaign page.
- Create a new goal for that campaign. As explained previously, only people engaged in your campaign will be accounted for the new goal.
- Create a new event. The event will appear in your campaign timeline.

7.6 ENGAGED USERS REPORT

This screen lists all the visitors engaged in the selected campaign

7.6.1 Using the tools above the list of profiles

You can:

- Do a full text search on all profiles included in the list by using the search field. The list of matching profiles is displayed in real-time under the search field as you type.

Beware that this search feature works on all profiles properties, not only names. As a consequence, you may have to dig into the profile details to see where the search term is being used in the profile.

- Change the columns that are displayed. A click on the icon opens the list of available properties. Check or uncheck the properties you want to display in the table.

The changes occur in real-time; you can check / uncheck several items.

Finally, click outside of the drop-down menu to see your updated screen, which can be very different from its original state.

ID	Nationality	Gender	Email	Phone number	City	Age	Actions
Franz Henry	Austria	female				44	✏ ☰ 🗑
David Ambrosio	France	male				45	✏ ☰ 🗑
Gerd Delevingne	Austria	male	doutzen.henry@test.com			33	✏ ☰ 🗑
Tyra Jeenner				001-202-555-7637			✏ ☰ 🗑
Kendall Ronaldo	Switzerland	female		001-202-555-8822		40	✏ ☰ 🗑
Christiano Swanepoel	Switzerland	male				92	✏ ☰ 🗑
Candice Klum	France	male				38	✏ ☰ 🗑
Christiano Crujff				001-202-555-1477			✏ ☰ 🗑

7.6.2 Campaign events

A campaign is sometimes done of multiple initiatives or submitted to revisions during its course (like raising or lowering a budget, relaunching a drip emailing, etc.). Marketing Factory offers the possibility to add so called "events" to a campaign so you can keep the memory of what has been done and try to monitor the impact of some decisions.

To create a new campaign event

1. Go to the campaign dashboard
2. Click on the top-right menu
3. Choose *Create a new event*

4. Fill the form

5. Save

Once a campaign event has been created, it appears in the time line, highlighting the date of the event.

Details about this event appear lower in the dashboard

CAMPAIGN EVENTS				
Name	Description	Date of event	Cost of event	Actions
2x AdWords	Doubled budget on words "car rental"	Tuesday, September 1, 2015 9:28 AM CEST (2 months ago)	$95000	🗑

📄 **NOTE**

Campaign events are just informative; they are not affecting calculations in any way.

7.7 ADVANCED USE OF CAMPAIGNS

Declaring your campaigns in Marketing Factory is not only useful to get performance statistics. You will also want to analyse the audience engaging to your campaign and who of them achieved the primary goal with the objective to improve the user experience.

7.7.1 Campaigns and segments

You can define a boolean segment property requiring a user to be engaged in the campaign

7.7.2 Campaigns and personalization

You can use the fact that a visitor is engaged in a campaign as a trigger for personalization.

7.7.3 Campaigns revival

You can easily extract the visitor segment that engaged in a campaign by expressing some interest for your campaign topic but then did not reach the Primary Goal.

You can also use the fact that a visitor is engaged in a campaign and has fulfilled the primary goal to go a step further and do a follow-up. Depending on your primary goal, the follow-up can be cross-selling, a personalized offer, a conversation with a sales representative, a meeting in a showroom, etc.

7.7.4 Campaigns and interests

If a visitor is engaged in a campaign, it means that the visitor has reacted to your campaign by clicking on a link or by typing an address in a browser. This means that most likely the visitor is more interested in the topic of your campaign than the average visitor. This information can be translated into interest points, which can be added to his or her profile. If the visitor performs your primary goal, additional points should be granted.

👁 **SAMPLE USE CASE**

Jeff is the Product Manager in a telecom company. He is responsible for a new offering on a worldwide high-speed Internet access for $10/month. The offer has been defined but will not be available for another three months because of technical details. Because Jeff fears that competitors may launch a similar offer faster than his company, he wants to move fast and decides to launch aggressive campaigns to generate pre-registration and qualified leads he will be able to re-contact when the subscription is available.

Jeff creates a dedicated website http://www.worldwidefor10bucks.com to present this offer, with a home page and three other pages that explain the details of the offering. The home page contains a call to action that leads to a form to register for the offer.

Jeff spent $500K in Google ads. Those ads will send visitors to the home page of his site with a special parameter in the URL that is passed on by Google. Using Marketing Factory, Jeff declares this campaign, sets the Google tracking number and defines the pre-registration form as the main goal. Jeff also defines 3 page visit goals (one for each 2nd level page of his site) because he wants to evaluate if people just fill the form or go reading the offer details and which one.

Jeff spends $300k in TV ads on local cable networks, promoting the Internet address http://www.worldwidefor10bucks.com/cableoffer, which contains another call to action with a

special rebate for immediate registration. He declares that campaign, its cost and sets the same form as primary goal.

Finally, Jeff spends $200k in a drip campaign. First, he uses Marketing Factory to extract all visitors that have visited the pages talking about LTE, international coverage, roaming; then he exports this list into a CSV format and imports the list into Marketo. The email contains a link to the home page http://www.worldwidefor10bucks.com with a special tracking ID that Jeff declares in a third campaign.

Looking at the results he knows instantly:
How many visitors were engaged in each campaign.
How many visitors converted by completing the pre-registration form.
The cost per converted user for each campaign.
How fast and for what duration each campaign has attracted visitors.

He can compare the return on investment (ROI) of each campaign and then decide to stop or invest more in the campaign(s) that provide the best results.

Digging into the reports, Jeff learns that 16% of the engaged people that did not convert are already customers that opted-in for the newsletter on the company customer site so he will be able to send a more targeted email to those customers. Also, digging into the results of the primary goal, Jeff discovers that conversion rates are very good for people from the West coast, especially if they connect from a Mac or an iPhone. Looking at his site, he sees that the home page uses an iPhone image, which may lead visitors to think that the offer is only for Apple users. Based on this information, he can decide to personalize his next message or the landing page to focus on this Mac/IPhone uses or to try to raise the conversion rate for the non Mac/IPhone visitors.

8 INTERNAL SEARCHES

Searches made by visitors on your website are captured in real-time. Marketing Factory provides detailed information about those searches: who, where and when those searches occurred and what the search terms are. This feature is a reporting tool and does not require any configuration or action from you once Marketing Factory is active.

8.1 TO ACCESS THE INTERNAL SEARCH REPORTS

1. Click on *Site metrics* in the left menu.
2. Click on *Internal searches.*

8.2 INTERNAL SEARCHES DASHBOARD

This screen shows all the searches that have been performed on your site, ranked by frequency (e.g., column: importance). The most frequent searches are at the top of the list. The ranking is done by a simple division: number of requests for this specific search term divided by the total number of searches x 100.

Internal Searches			
Show 10 ▼ entries			
Search term	Occurrences	Importance	Actions
untackling	1740	1.07	👁
chionodoxa	1728	1.06	👁
jacques	1722	1.06	👁
corollated	1702	1.05	👁
gatefold	1707	1.05	👁
intermesenteric	1691	1.04	👁
cub	1688	1.04	👁
obreptitious	1696	1.04	👁
nonionic	1676	1.03	👁
redundancy	1673	1.03	👁

← ‹ 1 2 3 4 5 … 10 › →   Showing 1 to 10 of 100 entries

You can reorder the table of results by any of the following columns:

1. Search term (alphabetically, ascending or descending).
2. Occurrences (value, ascending or descending).
3. Importance (value, ascending or descending).

You can click on the eye icon to see details about a specific search term.

This opens a new page with three tabs:

1. Origins: shows from which page the search has been requested
2. Profiles: shows the list of visitors that have done this search. If the visitor is identified by a first name and / or a last name, those will appear in the first

column. If the visitor is not identified, only his ID will be displayed by default.

For each user, marketing Factory gives you:

- o the number of searches done.
- o the importance (%) of searches for this visitor compared to the total searches. Clicking on the profile icon, you can access the individual visitor profile and come back to the list of profiles using the top-left arrow.

Profile	Occurrences	Importance	Actions
79675af9-4092-4e11-b22c-58b6877e18ec	360	21.33	
ace1bc4c-9303-4143-8206-1512f13101dc	123	7.29	
6e836185-6c7d-462a-ba4a-f74a758b161d	77	4.56	
00ee0d78-488f-4cb5-a26e-2fa7cca299cf	2	0.12	
558b9210-5146-4496-b76e-7e252dcef643	2	0.12	
621db50d-2490-4163-8136-a3a5049d2500	2	0.12	
73b42851-d4da-4778-a01a-e729a29ba7de	2	0.12	
7b60e804-533d-449d-ac00-32719980e82c	2	0.12	
7e61275e-ea38-4937-a809-75c8b2109881	2	0.12	
8bedb4b2-efea-4734-b70b-fa4f27904f1d	2	0.12	
8dd1c36e-248d-4e51-81c0-813ff4a89a2d	2	0.12	

From a specific visitor profile, you can go back to the list of profiles screen by clicking on the top-right arrow.

3. Language: show in which language version of your site the search was performed. A search term can be misleading in itself, because of the same words in different languages, or false friends, as well as visitors not always being rational and typing searches in a certain language, while navigating on your site in another language. That is why having a report about the current language of the page in which the search has been performed gives you a better understanding of your visitors' behavior and helps you compare the language of a search term with the language of the page.

8.3 HOW TO USE THE INTERNAL SEARCHES REPORT?

There is a large variety of insights you can obtain from the internal search report.

We list here four common subjects you can analyze and use the result to improve your site efficiency:

- Analyze the **most frequent searches**: look at the most frequent search terms and try to understand if this is normal (users just use the search form to go faster) or if it reveals that they have not found the information they expected to find, which requires taking a closer

look at your content, navigation or wording. Another reason could be that perhaps the content exists but the user enters different search vocabulary to search than the vocabulary used on the site.

- Analyze **where the searches have been performed from**: if a search has been performed mostly from a specific location (page or section), that can reveal the inability for the visitors to find the information they were seeking. On the contrary, searches executed on the home page or the top level pages of your site tends to be less significant and may reveal the fact that people are using the search feature mostly for convenience.

- **Look at search results quality** to see if users have been satisfied. Become a tester and try searching the most searched terms on a regular basis to review the returned results. If the search result seems correct and leads to the pages you expected to find, then you are in a good shape. If, on the contrary, the pages returned by the search feature do not seem appropriate, then you should take action: write additional content that is more relevant if the searched content simply does not exist, or, put tags and use more meaningful words in your content if you think that the content is available but is not searchable due to the way it is currently formatted.

- **Use search terms to engage your visitors**. Use a search term as a condition for a personalized experience or one-to-one conversation. Each search request performed is associated in the profiles database to the visitor who performed it. Hence, you can use that information to optimize the user experience. For instance: extract all the users who has searched for "this product" and send an email campaign with a promotional coupon, or personalize an area on your home page so the next time one of those users comes to your website, they will see immediately a piece of information for which they searched during their previous visit.

▤ LIMITATIONS

If you use Marketing Factory on a website that is not powered by Jahia DX, search requests will not be captured by default. To capture those search requests, a search event must be sent to Marketing Factory. Such search events can be implemented by your developers and triggered from the external platform. A search event consists of the search string and is sent to Marketing Factory.

9 REFERRERS

9.1 WHAT IS A REFERRER?

A referrer is the URL of the page that the visitor saw before accessing a website. Referrers are commonly grouped by domain name. Referrers information can be very important for webmarketers in order to understand where the traffic is coming from on the website. Referrers are a powerful source of information in Marketing Factory that can be leveraged for analytics and personalization.

9.2 REFERRERS PANEL

The referrers panel can be accessed from Marketing Factory, in the site metrics. In the table, for each domain name, you can see:

-   the domain name of the referrer

-   the number of occurrences: this is the number of sessions that were started from the domain name

-   The importance: calculated from the occurrences of this domain name compared to others

Possible actions:

-   The searched terms: this action takes you to another panel where you can discover all searched terms associated to a given domain name

- Details: this action takes you to another panel where you can see each profile. For each profile, you can see the visitor's first name, last name, date and time of the session and have the ability to access the profile page.

The referrers can be filtered by date.

9.3 REFERRERS IN PERSONALIZATIONS

Referrers are available as personalization condition, allowing marketers to personalize content depending on the source of traffic.

9.4 REFERRERS IN DRILL DOWN ANALYTICS

Referrers are also available in the drill down analytics, allowing marketers to analyze the impact of the source of traffic on the conversion rate for a goal.

10 INCOMING SEARCHES

10.1 WHAT IS AN INCOMING SEARCH?

An incoming search is a set of words that were entered in a search engine before they accessed your website. Incoming searches are also known as "search terms" but since "internal searches" is another feature of marketing factory, we wanted to ensure that no confusion could be made.

10.2 INCOMING SEARCHES PANEL

The incoming searches panel can be accessed from Marketing Factory, in the site metrics. In the table, for each searched terms, you can see:

- the searched terms

- the number of occurrences: this is the number of sessions associated to the searched terms

- The importance: calculated from the occurrences of this searched terms compared to others

Actions:

- Details: this action takes you to another panel where you can see each profile. For each profile, you can see the visitor's first name, last name, date and time of the session and have the ability to access the profile page.

The incoming searches can be filtered by date.

10.3 INCOMING SEARCHES IN PERSONALIZATIONS

Incoming searches are available as personalization condition, allowing marketers to personalize content depending on the source of traffic.

10.4 INCOMING SEARCHES IN DRILL DOWN ANALYTICS

Incoming searches are also available in the drill down analytics, allowing marketers to analyze the impact of the source of traffic on the conversion rate for a goal.

11 SEGMENTS

Segments are subsets of your entire visitor population that share certain characteristics (properties or logged activities, for instance). Segmenting an audience is one of the most common marketing techniques based on the assumption that, **statistically,** people sharing the same psychographic or behavioral attributes tend to react in the same way to given stimulations. As visitors in the same segment are presumed to share the same behavior, building segments allows marketers to create quick and efficient targeted personalization experiences.

11.1 TO ACCESS SEGMENTS MANAGEMENT PAGE

1. Click on *profiling tools* in the left menu.
2. Click on *Segments.*

11.2 SEGMENT DEFINITION

A segment is defined by a name, a description and an arbitrary number of conditions linked together by logical operators.

11.3 SEGMENTS PAGE

The segments page displays a paginated list of existing segments.

For each segment declared, is displayed its name, the number of matching profiles (red square), the fact that the segment is shared on the platform or not, the segment description (if filled) and 3 action buttons

Segment name	Description	Actions
Contacts **1288** **Shared**	This segment includes all contacts, meaning all profiles that contain a contact identifier such as an email, a phone number or a Facebook ID	✏ 👤 🗑
visits nov 06 **4389**		✏ 👤 🗑
Young adults (20-30) **1204**		✏ 👤 🗑

✏ Edit the segment details (name, description and conditions).

👤 View the list of profiles currently in that segment.

🗑 Delete a segment

11.4 CREATING A SEGMENT

To create a segment, follow this procedure:

1. Click on the "Segment" entry in the left menu.
2. Click on the top right menu.
3. Choose *Create new segment*
4. Enter a meaningful name for your segment (mandatory)
5. Enter a meaningful description for your segment
6. Save

At this stage the segment is declared but has no conditions define which profiles match. The second stage is then to add conditions.

11.5 BUILDING SEGMENT CONDITIONS

Segments are defined using the Condition Builder which is explained in details in the chapter Concepts. A segment is actually a rule containing one or more conditions that can be evaluated (or resolved) and that are linked together by logical operators.

If a visitor matches the conditions defined for a given segment, then s/he belongs to that segment. A user cannot be assigned manually to a segment if s/he doesn't match the conditions defined in the rule. The evaluation is done in real time by Marketing Factory, a soon as a segment is created or updated. Also, as soon as a profile is modified, Marketing Factory evaluates if the segment matches one or several segments.

To create the rule attached to you segment, just click on New Condition, then proceed as explained in Chapter 2.

Conditions have been structured into five types:

- Goal match
- Profile past event
- Profile interest
- Profile property
- Profile segment

Note that as you add conditions in your rule, Marketing Factory provides a very convenient count about the number of profiles / visitors matching.

This information is provided for the whole rule (1204 in the above example) and for each unitary condition (11448 and 1718 in the above example).

The above example can be read as the following: there are 11448 profiles that are 20 or older, 1718 tat are younger than 30 and 1204 that are between those two limits.

The reason why this count is useful is that it enable marketers to build unnecessary small segments (that match only a few profiles) and/or remove conditions for which the number of profiles is ridiculously low.

11.6 USING SEGMENTS AS CONDITIONS FOR OTHER SEGMENTS

Marketing Factory is a very agile system that allows you to use previously created segments as conditions to define a new segment. This is highly convenient to manage your segments efficiently and can save a lot of time in administrative tasks.

11.6.1   Segment Union

You can create a segment that will re-group several other segments using the OR operator between each of them. Logically, the resulting segment is the addition of all those segments.

For example: East Asia segment = User is from segment China OR segment Taiwan OR segment Japan OR segment South Korea.

All visitors that belong to one of the segments China, Taiwan, Japan, and South Korea will belong to the East-Asia segment.

11.6.2   Segments intersection

In the same way, you can use several segments as conditions with an AND operator to target a segment intersection.

For example: East Asian Students = East-Asia segment AND Students segment

Only visitors who are in both segments at the same time will be part of the East Asian students segment.

11.6.3   Segments inheritance

Segments in Marketing Factory are not organized in a tree structure (like folders and subfolders) with children inheriting properties from their parents. Nevertheless, as a segment can use other segments as conditions and, as the calculation of the segment population is done in real-time, this is functionally very similar to an inheritance mechanism.

If the segment(s) set as conditions are changed in their definition for any reason, then all segments using this condition will be instantly updated as well.

Let's say that our previous "Students" segment is defined by the following conditions:

- Age is between 15 and 21
    - o   AND
- The property "high-school" is "Yes"
    - o   OR
- The property "college" is "Yes"

We can create another segment for "US students" defined like this

- Segment is "Students"
  - AND
- Country is USA

First this segment is faster to create or maintain, because we don't have to redefine the previous 3 conditions that define the Students segment. Second, if the Students segment is modified to take people from 13 to 22, then the change will immediately impact the US Students segment without having to edit it manually.

📄 **TIP**

When building segments, unless you have very specific use cases, you should not try to be too specific. Multiplying very fine (hence, small in population) segments with too many conditions is not worth the time spent to manage them and may reduce performance. As the usage of segments is based on the fact that, statistically, the individuals who share the characteristics have similar behaviors, segments only make sense if there are enough profiles matching them.

11.7 SEGMENTS SHARING

By default, segments are linked to the site in which they have been created; hence, a segment created in site A will not be available in site B either for personalization rules nor to analyze collected data.

In order to avoid duplication and heavy maintenance tasks of the same segments across different sites, it is possible to share a segment across all sites. To share a segment, check the "Shared" bow in the segment details page.

Editing "Frenchies" segment

Segment name (required)

Frenchies

✓ Enabled   ☐ Shared

11.8 USING SEGMENTS

Segments are mainly used to create personalized content on your website(s). Most of the time, a personalization by segment offers a good return on investment (ROI) compared to time invested in producing and coding personalized content or assets. Assigning a segment to a personalized variant takes only a few seconds and allows you to refer to a population that is not too small (unless your segment contains a significant amount of conditions).

Segments are also very convenient to save a lot of time when building personalization as relying on them avoid to redefine over and over the same conditions, which takes time.

Segments are also useful to analyze the reports provided by Marketing Factory, particularly the Qualitative analysis of your goal conversions. They will help you search for patterns or anti-patterns in your visitor's behavior. It is more convenient to analyze results by segments rather than by trying to analyze user by user or property by property - even if that is a possible option with Marketing Factory. It can sometimes be more relevant than segments, which can mix multiple conditions.

12 SCORING PLANS

Scoring is a marketing practice that consist to evaluate an individual by assigning value points to certain profile attributes or activities performed on the website. Based on the calculated score, it is then possible to perform appropriate marketing actions.

Most of the time scoring is done to evaluate if a prospect is ready to buy something, that's why the most common practice is called "lead scoring" but scoring is not limited to evaluate leads. Marketing Factory allows you to create multiple scoring plans, knowing that different departments may have different priorities and therefore scales of evaluation.

For example, a sales team will emphasize on the readiness of a prospect to sign a deal, granting points to meaningful attributes like the Job Title, the number of visits in the past weeks, the meaningful pages visited like the pricing page, the demo page or an order-form PDF download; On the other hand, a support team will be more interested in evaluating the type of a visitor (technical vs others) and their need for technical help, granting points for visiting the documentation and forum sections of the website, downloading a troubleshooting brochure and looking at development videos.

Defining the scoring plan belongs to each company, depending on its industry, country and multiple other factors.

12.1 ACCESS TO THE LEAD SCORING MANAGEMENT PAGE

1. Click on *Profiling tools* in the left menu.

2. Click on *Scoring plans.*

12.2 DEFAULT SCREEN

The default screen displays the existing lists with the following information:

- Scoring plan name.

- Number of profiles part of the scoring plan

- Type of scoring plan

- Scoring plan description

12.3 SCORING PLAN BASICS

To create a scoring plan, follow this procedure:

1. Expand the profiling entry in the left menu.

2. Click on the *Scoring plans* entry.

3. Click on the upper right menu in the right page.

4. Choose *Create new scoring plan.*

To be able to save your scoring plan, it is required to give it a name, a type (see 12.4) and at least one condition (see 12.6). You can decide to share the scoring plan across websites by selecting "shared" option.

12.4 SCORING PLAN TYPES

Enter a type for your scoring plan. The type of scoring plan you choose will define the conditions that are available to build the score. Here are the 4 types are available, with the conditions types they are associated to:

a. Behavioral: engaged in campaign, goal match, profile past event and interests

b. Aggregated: segments, score of others scoring plans

c. Demographic: profile properties

d. Complex: all of the above

12.5 SCORING PLAN THRESHOLD

Scoring plans are commonly used to act on visitors who get a score above a given threshold. By default, Marketing Factory allows you to send a notification to an email address for that threshold.

It is possible for your IT team or your integrator to implement different behavior when a visitor reaches a threshold (i.e. create a lead in the CRM).

Scores are calculated dynamically and you can use profile past events (if the type is behavioral or complex) like "visited product page n times during the last 30 days"). It means that a score for a profile can change without any action from the marketer or the visitor. To ensure that the notification behavior is consistent, the threshold event can only be reached once for each profile.

12.6 SCORING PLAN CONDITIONS AND SCORE ATTRIBUTION

Before adding conditions to a scoring plan, you need to ensure that you selected a type for this plan.

Depending on the type you choose, you'll be able to add different types of conditions and associate them with points.

Inside the same scoring plan, you can add several group of conditions and associate them to a different number of points.
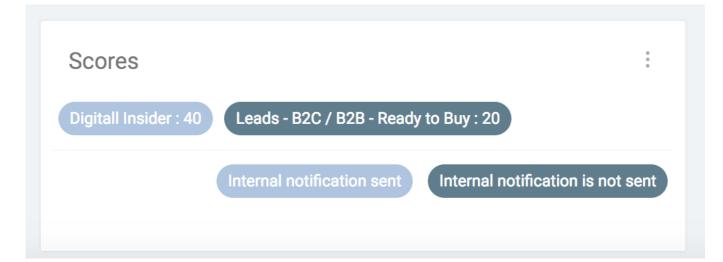
12.7 SCORING PLANS IN VISITORS PROFILES

On the visitor profile pages, if the visitor belongs to some scoring plans, the name of the plan and the score are displayed in the dedicated section. If the profile reached the threshold for the plan at some point, the scoring plan name and score are displayed with a light grey background.

12.8 SCORE MODIFIER

On the visitor's profile page, it is possible to add a "score modifier". A score modifier is a number of points (negative or positive) that can be added to a visitor for a given scoring plan.

For instance, if I know that a profile is interested in my products because I got the information by another channel, I can manually add points to ensure that the profile reaches the threshold.

Manage score
modifiers

NOTE: Scoring modifiers are extras to the
score value attributed by a plan.

Investors to contact

-100

Digitall Insider

-20

Leads - B2B - Executives interested in
VR offices
40

Leads - B2B - interested in VR offices

21

Leads - B2C / B2B - Ready
to Buy

SAVE   CANCEL

13 STATIC LISTS

Static lists are basic lists to which visitors have been arbitrarily added, manually or automatically. While very simple in their principle, static lists are very convenient for marketers and can be used for multiple purposes.

13.1 TO ACCESS TO THE STATIC LISTS MANAGEMENT PAGE

3. Click on *Profiling tools* in the left menu.
4. Click on *Lists*.

13.2 STATIC LIST DEFINITION

A static list is only defined by a name and a description (optional).

13.3 DEFAULT SCREEN

The default screen displays the existing lists with the following information:

- List name.

- Number of profiles associated with the list.

- List description.

The icons in front of each list allow you to:

- Edit the list details (name and description).
- View the visitor profiles assigned to this list.
- Delete the list.

13.4 CREATING A STATIC LIST

To create a static list, follow this procedure:

5. Expand the profiling entry in the left menu.

6. Click on the *Lists* entry.

7. Click on the upper right menu in the right page.

8. Choose *Create new list.*

9. Enter a name for your list.
10. Enter a description for your list.
11. Save.

13.5 MEMBERS (ASSIGNED VISITORS)

By clicking on the corresponding icon, you can access the visitors currently associated to a list.

You can access the details of an individual profile (and edit it manually) by clicking on the edit icon.

You can assign a profile to one or more lists by clicking on the list icon.

You can remove a profile from the list. By doing so, the profile itself will not be deleted from the profile repository, but it will also not be linked to this list anymore.

13.5.1   Using the tools above the list of profiles

You can:

- do a full text search on all profiles included in the list by using the search field. The list of matching profiles is displayed in real-time under the search field as you type.

Note that this search feature works on all profile properties, not only the profile names. As a result, you may have to dig into the profile details to see where the search term you have used is found in the profile.

- Change the columns that are displayed. Click on the icon to see the list of available properties. Check or uncheck the properties you want to display in the table.

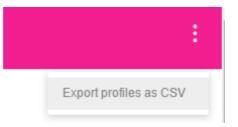The changes occur in real time, you can check / uncheck several items.

Finally, click outside of the drop-down menu to see your screen, which can be very different from its original state.

ID	Nationality	Gender	Email	Phone number	City	Age	Actions
Franz Henry	Austria	female				44	✎ ☰ 🗑
David Ambrosio	France	male				45	✎ ☰ 🗑
Gerd Delevingne	Austria	male	doutzen.henry@test.com			33	✎ ☰ 🗑
Tyra Jeenner				001-202-555-7637			✎ ☰ 🗑
Kendall Ronaldo	Switzerland	female		001-202-555-8822		40	✎ ☰ 🗑
Christiano Swanepoel	Switzerland	male				92	✎ ☰ 🗑
Candice Klum	France	male				38	✎ ☰ 🗑
Christiano Crujff				001-202-555-1477			✎ ☰ 🗑

13.5.2   Exporting profiles

Using the top menu, you can export all the profiles of a list into a .csv formatted file.

Export profiles as CSV

13.6 STATIC LIST USAGES

Static lists can be used in multiple cases.

First, they are perfect to store visitors linked to a particular event. In that case, a segment does not make sense, as no more users can be added to the segment once the registration for the event has terminated. Using a static list makes more sense.

You can also decide to maintain a more global list that captures in one place all users who are spread out in different third-party systems or fragmented into multiple lists (e.g., if you use an online webinar platform and their registration system stores user data).

You may also want to store lists in Marketing Factory that duplicates lists in other systems:

1. for security: if the third-party system becomes unavailable, or you decide to stop using it, you have a copy in your own repository.
2. for convenience: it might be much easier to manipulate visitors and lists in Marketing Factory than in other 3rd party systems.
3. for analysis: because you want to use that information as an analysis criteria point, for example as personalization condition.
4. for compliance: there may be a regulation requirement that your system must meet.

14 FORM MAPPING

The form mapping function is an important feature that lets marketers capture data submitted by visitors through forms and silently stores that data inside submitter profiles (anonymous or not), regardless of the initial purpose of the form. Correctly used, in conjunction with personalization, this feature enables marketers to put in place a powerful and efficient strategy of progressive profile nurturing by collecting reliable, meaningful, relevant and reusable data.

14.1 TO ACCESS THE FORM MAPPING MANAGEMENT PAGE

1. Click on *Form mappings* in the left menu.

14.2 FORM MAPPING DEFINITION

A form map is defined by a name, the path to the page, which contains the form, the form identifier (name or ID), and instructions on how to treat each field of the form, when the form is submitted.

14.3 FORM MAPPING OVERVIEW

Form mapping is a process by which a marketer defines that some fields in a form should be captured by Marketing Factory and inserted into the visitor profile. Of course, the visitor is the one who submits the said form.

Form mapping has been developed to work with most forms as soon as they are included in a Digital Experience Manager page, whether this is a html static form, a form built with Form Factory, and even if the form has been developed on a third-party platform. Only two constraints need to be fulfilled for your form to be compatible with the form mapping:

- the submit event has to be propagated and no js code blocking this propagation should be executed

- the form must be displayed on the page load or in the next 5s following the page load.

14.4 CREATING A FORM MAPPING

The creation of the form mapping is a multi-step process that starts by identifying the form that must be mapped, then by declaring the mapping between the form fields and the profile fields. To avoid mistakes, and because each operation is based on previously provided information, each step appears in the page once the previous step is completed.

- Click on the *Form mappings* entry (left menu).
- Click on the upper right menu.
- Choose *New form mapping*.

Step 1: a form appears

1. Give your mapping a meaningful name.
2. Give your mapping a meaningful description (optional).

Step 2: A new section appears

1. Copy and paste the URL of the page that contains the form or click on *Show the page picker* link. This will pop-up an overlay with your site map.
2. Open the tree with the arrows until you find the desired page (the one that contains your form), then click on the page name.

Once you have clicked on the page name, the overlay presenting the sitemap disappears and the field "Base page path" is filled with the correct URL.

Step 3: a new field appears

Then a new field appears in the page: form name. This field allows Marketing Factory to define which form to capture in the page, which can contain several (at least two if, like most websites, you have a search form present on all your pages).

To select the correct form:

1. Click on Show Visual Picker. This opens the target page in an overlay.

2. Scroll in the page to find where the form is, then click in any field to select the form.
3. Once a form is selected, the "OK" button (bottom-left) becomes clickable. Click OK.
4. The page disappears. The form name is inserted in the field. Two new sections appear in your form mapping builder: *Additional pages* and *Mappings*.

Step 4

A new section *Additional pages* appears to allow you to select other pages that include the same form (it needs to have the same Form name or Form ID) so you do not have to create one mapping per form instance.

1. Click on the page picker and choose another page containing your form.
2. Repeat that process as often as needed.

Step 5

The *Mappings* section is where you are going to map the form fields to the visitor profile fields.

As soon as you have selected a form, Marketing Factory has analyzed the form to extract each field (even the hidden fields). Those fields are available in the drop-down list labeled "Please select a form field".

1. Select a field.

2. Choose one field from the list: the field appears instantly on a grey / green background.

3. Select which profile property the value of this field should be stored to when the form data is captured by Marketing Factory. The list of properties displays all available properties currently declared in your visitor's profile.

4. Choose a **strategy** for this field capture. The strategy tells Marketing Factory how to react if the property is already filled inside the visitor profile.

Set property means that the value from the form submitted will be inserted in the visitor profile in all cases. If the property already had a value, the new value will replace it. This capability is very powerful but also dangerous. On critical properties, you should use this option only if you think that the form result is worthwhile to the visitor and s/he will definitely input a trustable value.

Set property if missing means that the value from the submitted field will be stored in the visitor profile only if the property is currently empty (or if the property does not exist yet).

5. Repeat the process for each field you want to map.

Note that as soon as a field has been mapped to a profile field, it disappears from the list of available fields. This avoids accidently mapping the same field twice with inconsistent directives and also shows users what fields remain to be mapped.

Note also that you are not obliged to map all fields from the initial form, obviously.

Finally, notice - at the bottom of the screenshot - the name of the city field is taken from the form. In this example this field name is understandable (city id) although it appears to be a little cryptic. This example illustrates how important it is to enforce your developer team or content contributors to choose meaningful names for the form. Form field names like "field1", "field2", etc. will make it close to impossible for marketers to properly map them to profile properties.

Finally, the form mapping builder allows you to assign visitors, who submit this form, to one or more **static lists**, which can be very convenient and flexible.

14.5 ADDING NEW PROPERTIES WITH THE FORM MAPPING
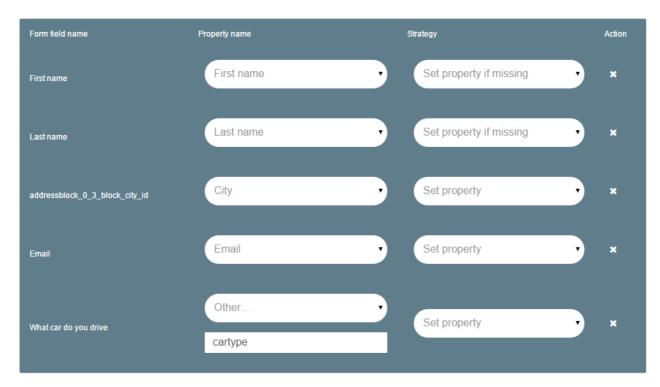
It can happen that a form contains fields that do not correspond to any existing property inside your Marketing Factory visitor profile, but that marketers would still like to capture anyway. Well, it is possible and, in fact, it is easy to achieve as well.

1. Click on the properties dropdown list.
2. Scroll till the end.
3. Choose *Other…*

4. In the field that appeared at the bottom, enter a meaningful property name for this new property. The identifier can only contain letters. No numbers, accentuated characters, punctuation marks or spaces are allowed.

5. Choose the strategy.

Now that the property has been prepared, as soon as a first-time visitor submits a form with this field filled, the property will be created and the value will be stored in his or her profile. To make the property appear in the profiles page (which is not mandatory in order to reuse it), please refer to the Profiles chapter.

15 OPTIMIZATION TESTING

Making their website perform better, improving it to increase visitor's satisfaction and, ultimately, obtain higher conversion rates are certainly top priorities for all marketers. It is, unfortunately, a tedious and complex task, and can be nearly impossible if you do not have the proper tools, to measure the effect - positive or negative - of the changes to the Web site you have decided to update. Marketing Factory integrates the support tools that enable this kind of testing easily. And with precisely measured results and statistical data you can make data-driven decisions versus those based only on assumptions.

15.1 OPTIMIZATION TEST DEFINITION

Optimization testing is, at its heart, the process of presenting different versions of a page (or a part of a page) to visitors in order to evaluate statistically which version provides the best results (or conversion rate) and user acceptance. Once the test is completed, the marketer can decide, based on precisely collected and measured data, which version provides the best results and then to use it.

To run a test, you need:

1. A place inside a page where the optimization test will occur.
2. A content or digital asset inside this place that will be your "control" variant.
3. One or more additional variants.
4. A clear goal that will be your measure of success (with each success being called a conversion):
   a. A form submission.
   b. A page visit.
   c. A download.
   d. A video played.

When it comes to optimization tests, most online marketing platforms are limited.

1. Some of them limit the tests to certain types of content (i.e., teasers, banners, images). Marketing Factory allows you to create optimization tests on any type of content - even on forms, which can be very convenient when measuring the impact of adding or removing a particular form field.

2. Most platforms do not allow the testing of different types of items at the same time. If you decide to run a test on a banner, they will let you create other banners as variants but nothing else. Marketing Factory lets you test more radical variants. For instance, you can display a simple Call To Action asset in variant A, while providing a form in variant B.

15.1.1 Vocabulary

In Marketing Factory, a test is called an **optimization test**.

To avoid any confusion with terms commonly used when working with a content management system (CMS), the different pieces of content or assets that will be served to visitors during an optimization experience are called **variants**.

Digital marketers have divided the optimization testing practice into three main types of tests: A/B testing, A/Z testing, multi-variant testing. Unfortunately, the definition for each type of test is not always consistent for all marketers and the way a given testing platform handles a particular type of test can differ greatly from another one, especially for multi-variant testing.

Accordingly, it is essential for you to understand what each type of test means when using Marketing Factory.

15.1.1.1 A/B testing

A/B testing divides incoming traffic between two variants and measures the results (or conversion rate) for each variant. A/B testing is easy to set up, and results are easy to interpret, but is best-used and most appropriate for small changes.
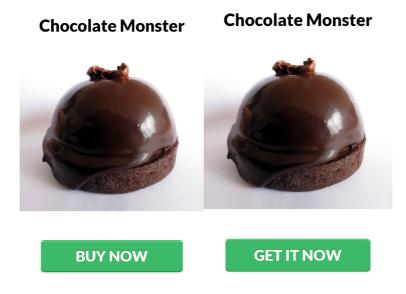
In the most rigorous methodology, only one precise factor is changed at a time (such as color, size, position, text, asset, etc.) between both variants to make the interpretation of the results easier. The problem is that testing only one dimension at a time takes time. It is a powerful but slow iterative process.

Often, A/B testing is used to try variants of text labeling, color or size on buttons and other call to actions, such as in the following examples:

Same content, same button, except for the button label:

Chocolate Monster   **Chocolate Monster**

[BUY NOW]   [GET IT NOW]

Same content, same button label but a different button color:

Chocolate Monster   **Chocolate Monster**

so yummy!!!   so yummy!!!

[BUY NOW]   [BUY NOW]

A/B testing is very precise but, if you want to test multiple changes at a time, you will have to test each improvement one by one, which may take a significant amount of time until you are done.

15.1.1.2   A/Z testing

A/Z testing divides the traffic between three or more variants. It is an extension of A/B testing and the same pros and cons apply. The more variants you want to test, the longer the experience will have to run in order to get significant results. BUT you have less tests to run.

Be Greedy!

Don't be fooled by cheap imitations, which use soy paste or almond essence. The real stuff, which uses nothing but ground almonds with sugar, is so good, you'll eat a whole bar of it, feel sick, and still find yourself toying with the wrapper on bar number two.

Be Greedy!

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Chocolate Monster

Chocolate Monster

Chocolate Monster

so yummy!!!

so yummy!!!

so yummy!!!

BUY NOW
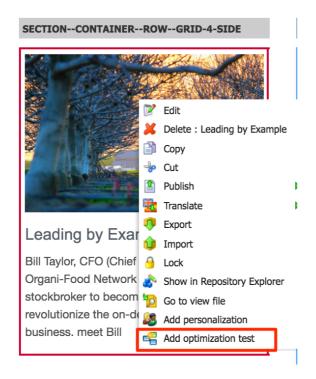
BUY NOW

BUY NOW

15.1.1.3 Multi-variant testing

Multi-variant testing consists of defining multiple variants for multiple experiences on a page at the same time and serves a version of the page based on a randomly generated combination between all the possibilities to visitors. As a consequence, multi-variant testing implies you will have high numbers of users engaged in a test to obtain credible results. Interpreting those results can be quite problematic for the marketer. Why a particular combination worked better than other combinations is often difficult to assess. Optimization testing is not only about finding the best experience but is also about understanding why this particular experience works better because it can drive further optimizations.

Marketing Factory allows you to do A/B and A/Z testing in multiple areas of the same page, but does not provide multi-variant testing analysis at this time

15.2 CREATING A TEST ON A CONTENT

To create an optimization test, follow this procedure:

1. Go into any page of the Web site (powered by Digital Experience Manager).
2. Right click on the page on which you want to create an optimization test.
3. Click on *Add optimization test.*

4. Create or insert new content in the list.

Create new content:

Paste existing content:

Paste existing content as a reference:

5. Open the settings dialog by clicking on the main button:

6. In the dialog box, complete the following fields

Field	Usage
System name	Name of the test in the repository
Active	Checked by default. Uncheck to stop / pause the optimization test.
Ajax rendering	If you're experiencing troubles to display some of the variants it may be because of a JavaScript or css conflict. That situation can happen in particular with content coming from an external

	service and embedded in your page. Check the box to try an alternate type of rendering and see if it solves the issue.
Starts on	The personalization will start on that date. If the field remains empty, the personalization will start immediately (as soon as the page is published)
Ends on	The personalization will stop automatically at that date. If the field remains empty, the personalization will never, until a manual action.
Maximum hits	Maximum number of times the optimization test will be served to users before it stops. If you have two variants and 4,000 hits, then statistically each variant will be displayed 2,000 times (whatever the number of conversions) and will then stop the test.
End strategy	Let's you define what must happen when the test ends. There are two possibilities. First, Digital Experience Manager will automatically use the winning variant (the one with the highest conversion rate). Second, Digital Experience Manager will continue to serve the current control variant. Then it is up to you to decide manually to promote another variant.
Control variant	Let's you choose between all the variants as to which one should be the control

Define the goal to measure your success rate. As soon as a test has started, it is not possible to change the goal anymore; this ensures your results are valid. (Otherwise, the results could be completely false.)

7. Save.
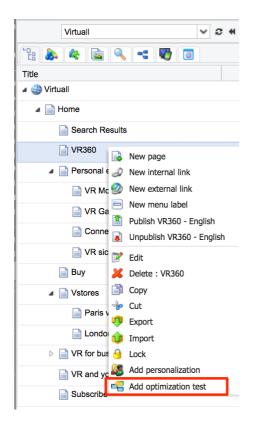
8. Publish the area

15.3 CREATING A TEST ON A PAGE

To create an optimization test, follow this procedure:

1. Go into any page of the Web site (powered by Digital Experience Manager).

2. Right click on the page on which you want to create an optimization test.

3. Click on *Add optimization test.*

Add optimization test on a whole page

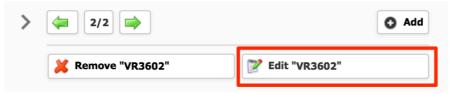4. Create a new page from the dedicated toolbar that will appear top right :

Please note that by default, the existing page is copied as the next variant so you can

modify it instead of starting from scratch.

5. If you want to edit the current variant, you can use the toolbar:

6. To open the settings dialog, go to the "main" page edit function, either through the left panel site tree or with the edit button that you can find top right :

The settings dialog is the same as the one available for content level optimization tests.

15.4 TEST RESULTS

Once an optimization test has started, you can follow the results in-context.

1. Go into the page containing your test
2. Open the settings dialog by clicking on the main button:

3. Click on the *Goal* tab

This tab does not provide the GUI to choose the goal of the test anymore (changing this goal in the middle of the test would lead to incoherent data) but displays the measured results instead.

Results are displayed as a table

1. Number of views: number of times the variant has been displayed
2. Success: number of visitors having seen this variant who converted (achieved the goal)
3. Conversion rate
4. Lift: the % difference between your control variant and other test variants.

This first level of reporting allows you to easily identify which variant has the higher conversion rate and may increase performances if promoted as default variant when the test ends.

But in fact, reports work like all the other reports in Marketing Factory and allows marketers to break-down the results using the filtering options.

Thanks to that capability, marketers are not only able to know that a variant works better for the overall audience, but can see if another variant works perhaps much better for a subset of the audience. In that case, promoting the winner will improve the conversion rate, but creating a permanent personalization to serve the best variant to each segment of the audience for which it works the best can improve the results much higher!

15.5 OPTIMIZATIONS DASHBOARD

Optimization dashboard can be found under site settings => Marketing Factory => Optimization dashboard

The dashboard has 2 tabs: one is listing the optimization tests done on contents and the other is listing the tests on whole pages.

The following information is displayed when the user expands a test. For the test itself:
- System name
- Number of variants
- A link to the page containing the test
- Publication status of the test
- Ajax rendering: true / false
- Start date
- End date
- Control variant name
- End strategy
- Type of the goal associated to the test
- Goal associated to the test (name of the form, name of page view, …)

For each variant in the test:
- System name
- Publication status
- A preview button (Note: the preview doesn't include the css of the site and might not match the final rendering)

The textbox at the top of the page can help you finding the optimization test you're looking for. It will filter the current list based on all the fields that are displayed (either for the variant or for the tested area).

ADVICES

Testing is critical for marketers but it is a complex activity. Setting up a test is straightforward, thanks to Marketing Factory's ease of use. But to correctly define the test variants, produce them and then interpret the results is not a trivial job. Following are some recommendations to help you be successful with your testing.

Duration: The duration of your test is critical. Most sites do not have enough traffic to hit statistical significance in a day or two, because the test will not touch your entire audience in its full diversity. You should also run your test at least for 3 or 4 days to let your traffic normalize between all segments. Ideally, your test should run a full week, including weekdays and a weekend, because visitor behavior is often different between weekdays and weekends.

Atypical traffic: be aware that a marketing campaign running at the same time as your test can send atypical visitors and influence the results. That does not mean you should not do campaigns at the same time as testing; more that you should keep that fact in mind when analyzing the results.

Cost: continuous testing requires you to produce lots of content (such as digital assets, text variants, sometimes layout changes, etc.). Carefully evaluate the expected benefits but also consider the means that are necessary to run a truly successful optimization campaign (meaning multiple or permanent tests). Do not launch yourself into such a project if you do not have the resources to do so.

Remember that optimization testing is not a magic wand and that, sometimes (even often!), the test results can be deceptive simply because visitors do not prefer the variants significantly more or less than your control version. In that case, the test result will not reveal a better option than what is already online. Testing should be a continuous effort to find what works and what does not; you will have to learn iteratively through each success or failure.

16 PERSONALIZATION

Personalization is the ultimate online marketing feature that allows marketers to tailor the content displayed to the visitors in order to improve their customer experience by providing more accurate content, by anticipating their needs, by simplifying their digital life. Personalization is the art of showing the right content to the right person at the right moment.

16.1 PERSONALIZATION DEFINITION

Personalization is the fact to deliver a specific content to a particular visitor based on what you know about him.

16.2 HOW PERSONALIZATION WORKS

Personalization works by selecting an area in a page and adding multiple content items called **variants** in that area. Each variant is associated with conditions.

When a user arrives on the page, Digital Experience Manager receives the contextual information about that visitor from the Context Server, evaluates if and what variants conditions are matched by this visitor and displays the most appropriate one.

16.3 PERSONALIZE A CONTENT

Personalization experiences are created directly in Digital Experience Manager, in-context.
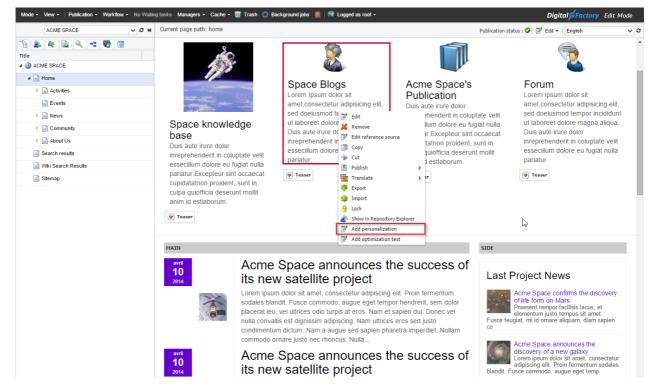
To create a personalized experience

1. Go into any page of site (powered by Digital Experience Manager).
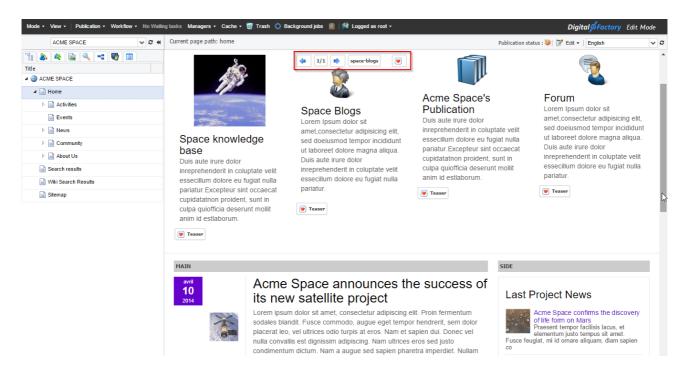
2. Right click on the content on which you want to create personalized experience

3. Click on Add personalization

    a. A list is created that now surrounds the previously existing content

    b. A toolbar appeared

4. Now you are ready to add other content items inside the personalized section.

5. To add content you can

6. Create a brand new content item by clicking on the "plus" icon in the toolbar

7. Copy and paste existing content from your repository (the content is duplicated)

8. Copy and paste a reference to existing content (an alias is created)

9. Cut and paste existing content from your repository (the content is moved)

Each time a content is added to the Experience, the counter is updated
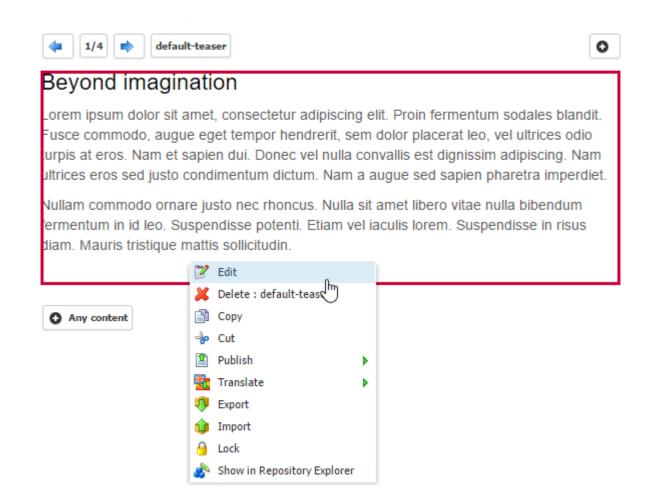
Thanks to the previous and next arrows, you can scroll the different content items. The name of the current item is displayed in a button.

To edit the properties of an item, scroll back or forward to make the content item appear, then right-click on edit, as you would do to edit any other content item in Digital Experience Manager Edit Mode.

Once you've created all your variants, you have to define, for each of them, the personalization rule that will define if the variant should be served to a visitor accessing this page or not.

Right-click in the toolbar and select Edit, or click on the button containing the current variant name:

In both cases, the following dialog will open. The first tab *Content* is selected by default.

Field	Usage
System name	Name of the variant in the repository
Active	Checked by default. Uncheck to stop / pause the personalization process
Ajax rendering	If you're experiencing troubles to display some of the variants it may be because of a JavaScript or css conflict. That situation can happen in particular with content coming from an external service and embedded in your page. Check the box to try an alternate type of rendering and see if it solves the issue.
Starts on	The personalization will start on that date. If the field remains empty, the personalization will start immediately (as soon as the page is published)
Ends on	The personalization will stop automatically at that date. If the field remains empty, the personalization will never, until a manual action.
Content display strategy	Defines what Digital Experience Manager should do if a visitor satisfies the conditions for several variants.
Random content	Digital Experience Manager will display randomly a variant between all the variants that match
Matching conditions first content	Digital Experience Manager will display the first variant WITH A CONDITION that matches in the order of the list.
Fallback variant	Defines which variant Digital Experience Manager should display if a visitor doesn't match any of the variants. If this field is empty, such a visitor will see nothing, the Experience will be empty.
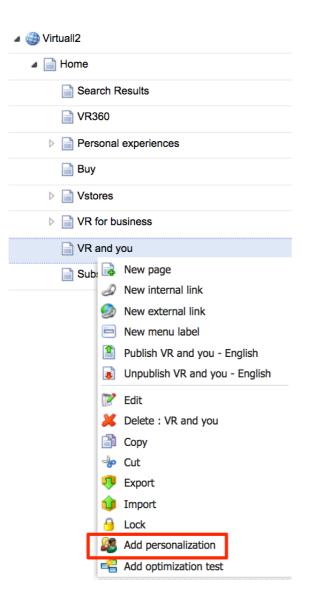
16.4 PERSONALIZE A FULL PAGE

Personalization can also be applied directly at the page level, again, in-context.

To personalize a page

1. From DX, right click on the page that you want to personalize

2. Click on Add personalization
   a. A toolbar appeared at the top right of the page

3. Now you are ready to add a new page variant

4. To add a new page variant you can click on the "+ Add" button. It will copy the existing page as a new page variation

5. To edit the properties of a page variation, use the arrows of the toolbar to go to your variant and then use this edit button:

6. To edit the first page variant and the conditions of how they will display, you can use the DX existing edit button as follow (or use the right click => "edit" in the site tree panel).

7. You can now edit the conditions that will define if a variant should be displayed or not, as you would do for any content.

16.5 RULES AND CONDITIONS

For each variant, marketers must define the rule that defines for which visitors it will be displayed. This is called conditional rendering. As for **advanced search** and **segments**, this activity is done using the condition builder that has been explained in details in chapter Concepts. There are slightly more options to handle all the contextual information available during the session (the visit) and that is specific to this session.

16.5.1 To create a rule for a variant

1. Click on the third tab *Variant conditions* in the Edit dialog

2. Select the desired variant by clicking on its name

3. Choose the type of rule:

    a. *Segments* allows to create fast personalization based only on segments. The list of segments is provided by the Context Server.

b. *Location* allows to create fast personalization based only on the visitor's current location (geolocation). This information is resolved by Marketing Factory when the user starts his or her session and is provided to Digital Experience Manager by the Context Server.

c. *Custom* shows a complete condition builder, similar to what you have already seen previously in the profile advanced search or segments building. The only difference is that this condition builder provides also the context conditions that are not coming from the Context Server but are resolved on the fly for this particular visit.

4. Define the conditions
5. Save
6. Publish

16.5.2   Conditions details

As explained, to make a marketer's life easier and because those are the most common types of personalization rules, Marketing Factory allows to create a fully custom rule mixing all types of conditions and two more straightforward possibilities.

16.5.2.1   Segments

This option allows to define that a variant should be displayed to one or several segments, or to all segments except the ones selected.

16.5.2.2 Location

The *Location* condition allows to define if a visitor should see a variant based on where the current **country** connection is coming from (which is different from his profile address).

16.5.2.3   Custom

The custom entry allows to build a fully custom rule, based on all profile properties, behavior data (visitor history) and contextual information (session).

The custom rules are built based on the Condition Builder (see Chapter Concepts) starting by choosing a first condition

Then you can add other conditions with the AND or OR operators.

What differs from the standard Condition Builder used in segment and advanced search, is the presence of contextual information data to define conditions.

This contextual conditions available are:

1. New visitor: the visitor is unknown to Marketing Factory.
2. Returning visitor: the visitor already made one or several visits.
3. Session duration.
4. Session property: operating system, browser, IP address, etc.
5. Geolocation by point: define a precise location from a central point
6. Geolocation by country: just personalize on the country from which the visit is done

The geolocation by point allows to use a map (provided by Google maps) and to set an area around that point, square or circular by clicking on one of the bottom left buttons.

Selected variant

| default-teaser | moon teaser | mars-teaser | venus-teaser |

This variant will appear for users matching the following condition

| Segments | Location | Custom |

✖ Remove the condition for this variant

Handles around the circle / square allows to define a precise perimeter for your geo targeting.

Of course geolocation criteria can be combined with any other user property or session information.

As it is the case for segments, marketers can build very complex rules made of several conditions, nested or not, in order to target their visitors very precisely.

Let's use the following example

In the above example, the variant will be displayed to:

Visitors who are on the site since more than a minute, have an interest for mobile higher than 40 points in their profile and have already downloaded the XP5000 brochure (download goal)

OR

Visitors who are on the site since more than a minute, have an interest for mobile higher than 40 points in their profile, have already seen the XP 5000 technical details page (visit goal) and are currently browsing using a mobile or a tablet.

As previously explained, deciding to build very precise rules (which will target less people but with more accuracy) and evaluating if it is worth the effort is the marketer's responsibility. Whatever the strategy, Marketing Factory is simply a tool that can support your efforts, from a simple personalization scenario down to a one-to-one conversation like this:

Obviously, that personalization rule will target only one person!

16.6 VARIANTS ORDERING

If you choose the strategy "Matching conditions first content' for your personalization at page or content level, it means that the first content matching the conditions will be displayed to the visitor. Therefore, you might want to reorder your variants. This can be done using drag n drop, as shown below:

16.7 PERSONALIZATION DASHBOARD

The personalization dashboard can be found under site settings => Marketing Factory =>

personalization dashboard

The dashboard has 2 tabs: one is listing the personalization done on contents and the other is listing the personalization on whole pages.

The following information is displayed when the user expands a personalization:
For the personalized area:
- - System name
- - Number of variants
- - A link to the page containing the personalization
- - Publication status of the personalization
- - Ajax rendering: true / false
- - Active : true / false
- - Fallback variant name
- - Start date
- - End date
- - Content display strategy

For each variant in the personalization:
- - System name
- - Friendly name
- - A preview button (Note: the preview doesn't include the css of the site and might not match the final rendering)

The textbox at the top of the page can help you finding the personalization you're looking for. It will filter the current list based on all the fields that are displayed (either for the variant or for the personalized area).

17 PERSONAS

Personas are fictional characters that represent archetypal segments of your population. Personas are declared and stored in Marketing Factory, used by content authors and marketers to simulate visitor navigation and behavior and to control how the personalized experiences perform on the site for various persona properties.

17.1 TO ACCESS THE PERSONAS MANAGEMENT PAGE

1. Click on *Audience* in the left menu.
2. Click on *Personas.*

17.2 PERSONAS DEFINITION

Personas are fictional visitors with pre-defined properties that marketers create to personify their main targets or significant parts of their audience. In Marketing Factory they are used to simulate how a personalized web site changes dynamically depending on who is visiting it.

17.3 DEFAULT SCREEN

The personas default screen shows the list of existing personas. Three personas are pre-built in Marketing Factory.

ID	First name	Last name	Actions
Google Bot	Google	Bot	✏ 🗑
Non U.S. Visitor	Non U.S.	Visitor	✏ 🗑
U.S. Visitor	U.S.	Visitor	✏ 🗑

17.4 CREATE A NEW PERSONA

To create a persona, follow this procedure:

1.   Expand the profiling entry in the left menu

2.   Click on the Personas menu

3.   In the main page, click on the upper right menu

4.   Choose *Create new persona*

5.   An empty profile appears

6.   Fill the properties you want to set for this particular persona

For the purpose of this demonstration, let's create two personas:

- Virginia, a 22 year-old women, Canadian, single, student, who currently lives in Paris.
- Stephen, a 35 year-old man who lives in Denver, married with three kids, and works as a programmer.

    Stephen's profile:

MARKETER GUIDE

MARKETING FACTORY 1.6

jahia

VISITOR PROFILE

PERSONA

Stephen Persona

visits

First visit:

Last visit:

Basic Info

First name

Stephen

Last name

Persona

Nationality

USA

SAVE   CANCEL

Gender

Male

Assigned to

Name or email

SAVE   CANCEL

CONTACT INFO

E-mail

stephen.persona@denvercity.org

City

Denver

Phone number

Country

USA

Address

Zip code

SAVE   CANCEL

OTHER INFO

Personal Info

Age

35

Birth Date

Marital status

maried

Kids

3

SAVE   CANCEL

Work

Company

Job title

Developer

Income

95000

SAVE   CANCEL

18 MARKETING FACTORY PREVIEW PANEL
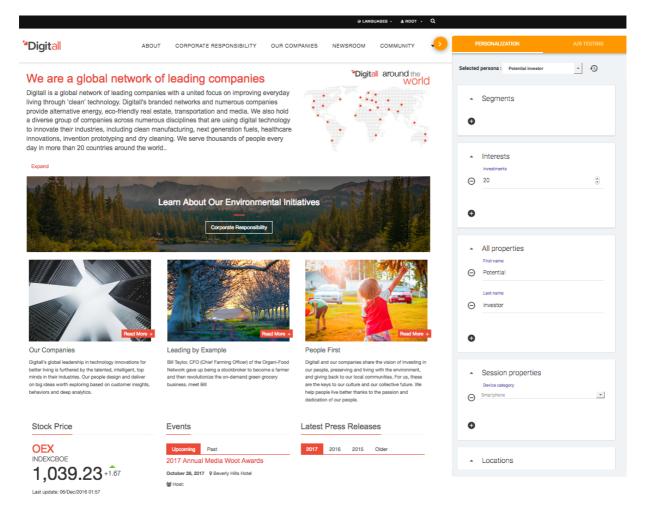
18.1 PREVIEW PANEL

You can find the preview panel in DX preview mode. When switching in this mode, you will see in the top right corner a floating icon.

Click on this icon to display the preview panel:

As you can see below, the preview panel will be displayed from the right and includes two tabs, allowing you to preview your optimization tests and your personalizations.

18.2 PERSONALIZATIONS PREVIEW

18.2.1   Use a predefined persona

The preview panel allows you to load one of the pre-defined personas. As soon as the persona is loaded, the pages of your site will react dynamically as if this persona was the current visitor.

Persona selection:

Use the drop-down list to switch from one persona to another.

If a personalizations have been defined on the page, and if the persona matches the conditions, then the personalized content item will be displayed.

As it is not reasonable to create dozens of personas to cover all the possible personalization use cases, Marketing Factory allows you to change most of the properties of your personas on the fly in order to simulate other visitor characteristics.
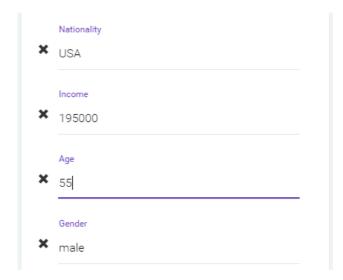
Note that when you change some properties of a persona in the persona panel, those changes are applied on the fly and are not saved. The persona is also not changed. If you want to change the persona definition, you have to go into the Marketing Factory admin panels.

18.2.2   Modify, remove or add properties on the fly

To modify a pre-defined property of any one persona, just click on the value to edit it, change the value and leave the field to validate. Changes are applied on the fly and the pages you see in preview will change according to those changes.

Nationality

✖ USA

Income

✖ 195000

Age

✖ 55

Gender

✖ male

To remove a property, click on the **X** icon.

To add a new property, click on the + icon at the bottom of the Properties Box, then choose which property to add from the drop-down list. Note that, to avoid defining the same property twice with different values, only properties that are not already used in the current simulation are displayed in this list.

18.2.3   Segments simulation

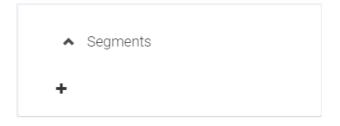To allow all types of simulation, you can also mimic the fact that your persona belongs to one or more given segments.

Click on the + icon in the segments box.

Choose one or several segments (use Ctrl key to select multiple lines) and validate.
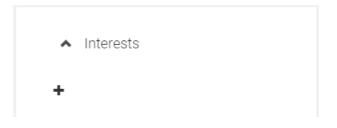
18.2.4   Interests simulation

You can do the same with interests to simulate the fact that your persona has interests in one or more areas.

Click on the + icon:

Fill an interest name and a value, then save.

You can add as many interests as you want.

18.2.5 Session (context) simulation
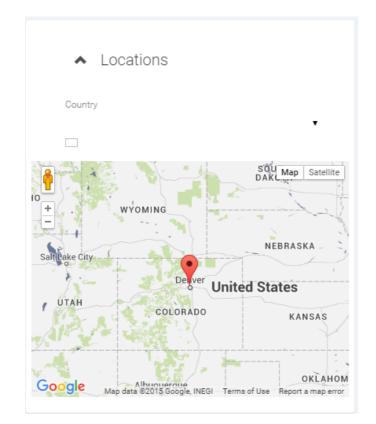
You can simulate the session properties of the visit, all the contextual information that can change from one visit to another. These session properties like browser, operating system, requesting IP, etc, are quite useful to personalize the user experience.

18.2.6 Geolocation simulation

You can also use a map to simulate where the user is visiting from on their device. You can choose a country from the drop-down list to quickly position the map on it, or select the country by moving the pin manually.

18.2.7 Reset

As soon as you have started to change the definition of the persona, a reset button has appeared near the persona selector. At any time, you can come back to the persona as it has been defined (and is stored) in the Marketing Factory admin panels by clicking on this button:

Remember that all modifications done to a persona in preview mode are only done on the fly and do not affect the persona as it is stored in Marketing Factory repository.
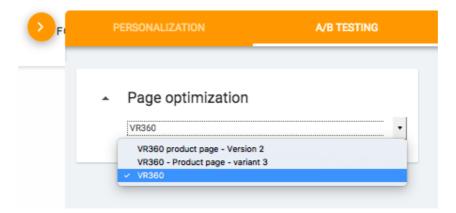
18.3 OPTIMIZATIONS TESTS PREVIEW
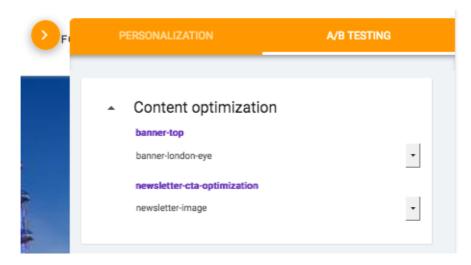
18.3.1   Page level optimization tests

When switching to the optimization tests tab (AB Testing), you will first see the page level optimization tests, as below. By switching from one page variant to another in the dropdown, you will preview the page you want.

18.3.2   Content level optimization tests

If you added optimization tests inside the page, you'll see the "content optimization test"

📄 **WARNING**

 Before previewing your optimization tests, ensure that you associate them to a goal, otherwise, they will not appear

19 MARKETING FACTORY COMPONENTS

Marketing Factory components is another module that can be downloaded on the jahia public store but that do require Marketing Factory module to work (and Marketing Factory license key). It comes with its own droppable components that you add to your templates or pages, as any other content.

19.1 PRIVACY MODAL

The privacy component is a button that can be added anywhere on your site.

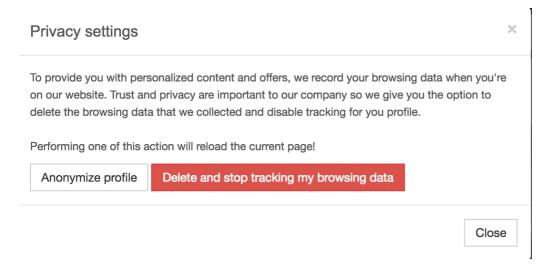It's up to you and your organization to decide if you want to provide the following features to your visitors.

Button:

By default, once published, when the visitor clicks on the button, the following popup appears :

19.1.1   Anonymize my profile

The action "Anonymize profile" will delete from Apache Unomi the personal identifiable information of the visitor. This is a one time action, it means that if the visitor log in again or fills a new form that has been mapped to Unomi, the personal information will be collected.

By default, Unomi is configured to delete the following when this action is triggered: first name, last name, email, phone number, address, facebookId, googleId, linkedInId, twitterId. This list can be easily modified (through a configuration file of Apache Unomi).

19.1.2   Delete and stop tracking my browsing data

The action "Delete and stop tracking my browsing data" will ensure that the browsing data (past and future) of the visitor won't be associated to his personal information.

This is a powerful feature that allow visitors to keep control of their data but doesn't impact the statistics that are useful to the marketers.

20 SETTINGS

20.1 PERMISSIONS

3 permissions are coming with Marketing Factory:

- "Can access marketing factory": give access to all panels of Marketing Factory in the site settings. However, only "site administrators" will be able to access the panel "Marketing Factory Settings".
- "Can optimize with Marketing Factory": Permission to add an optimization test on an area
- "Can personalize with Marketing Factory": Permission to add an personalization on an area

20.2 SETTINGS AND CONNECTION TO UNOMI

Connecting to Unomi might imply technical constraints depending on your environment. Please refer to the Marketing Factory installation, configuration and fine tuning guide.