



GETTING STARTED WITH SITEFINITY DIGITAL EXPERIENCE CLOUD

Introduction

In the modern digital world, customers interact with your company via a growing number of channels, each channel typically accumulating customer data in a disparate system. Customers often choose multiple digital channels through which they interact with you and they expect a personalized, seamless, and continuous experience regardless of whether they are browsing from their phone, then tablet, or laptop. Sitefinity Digital Experience Cloud (DEC) helps you profile and understand your audience and the customer journey, so that you create impactful personalized content to achieve your desired business outcomes. Sitefinity Digital Experience Cloud integrates web site tracking across all data sources and provides data-driven insights and suggestions, which help you optimize the end-to-end customer experience, driving both short-term and long-term business and marketing goals.

WHAT ARE THE KEY BENEFITS?

- Build a full 360° view of how your contacts interact with your brand
- Personalize your website, mobile apps, or email campaigns based on persona profiles and dynamic scoring models for both registered contacts and anonymous visitors
- Run manual or automated sales workflows for your Marketing Qualified Leads (MQLs)
- Increase your online or offline conversion rates for any channel
- Find out which marketing resources or campaigns deliver best results, regardless of where the digital assets reside or where the conversions happen
- Provide the **Best Next Experience** for any visitor, based on innovative prescriptive analytics

Sitefinity Digital Experience Cloud also helps you answer marketing and business questions such as:

- Who are our customers and prospects?
- How does a customer interact with our organization across channels?
- What part of our audience belongs to a specific buyer persona?
- How many hot leads do we have? Who are they?
- What are our conversion rates?

- What are our most important audience segments that we should target with a campaign?
- What's the ROI of our content assets, such as whitepapers and videos?
- How does one whitepaper attribute to increasing conversions versus another whitepaper?
- What can we do to optimize our conversions, such as website registrations and purchases?
- If we run a campaign, how likely are we to increase conversions and by how much?

WHERE DOES THE DATA COME FROM?

Sitefinity Digital Experience Cloud is integrated with Sitefinity CMS out-of-the-box, which enables you to easily import contact characteristics and behavioral data from your Sitefinity CMS site(s). Using this data, Sitefinity Digital Experience Cloud calculates reports and derives recommendations, which you can incorporate into your marketing campaigns. You can also track third-party web sites by utilizing a JavaScript SDK or the RESTful API, which you can integrate directly or use Google Tag Manager. To get the most out of the Sitefinity Digital Experience Cloud, we recommend plugging in other data sources, such as a CRM or an email marketing system. To do so, leverage the DEC SDKs and APIs, or, for faster integration, leverage the Sitefinity Digital Experience Cloud data connectors for Salesforce and Oracle Eloqua.

Workflow

To get started, login and create a data center to store your website visitors data. Sitefinity Digital Experience Cloud processes and calculates this data to create reports based on the information you are interested in tracking. For example, you may want to track when a contact becomes a qualified lead, or which digital assets drive a higher number of specific conversions. To segment your audience and deliver personalized content for each segment, you can utilize the persona scoring models or “Best Next Experience” recommendations.

1. Log in to Sitefinity Digital Experience Cloud and create a data center.
2. Depending on your scenario, plug data from Sitefinity and/or other systems.
3. Define conversions, touchpoints, persona profiles, or lead scoring models.
4. Examine reports and recommendations.
5. Act upon the insights:
 - Configure content personalization
 - Run targeted email campaigns
 - Modify current digital assets

STEP 1: Log In And Create a Data Center

Once you get your DEC Administrator account from our Sales team, you have the required credentials to log in DEC, create data centers, and invite other users. Keep in mind that the first time you log in Sitefinity Digital Experience Cloud, there will be no data centers created, and therefore, no data to produce reports. You can get a first taste of DEC via the sample data center with populated sample data and reports. You create your own data center(s) and plug in and accumulate data. The data center is a dedicated entity to encapsulate data from specific data source(s).

To do so:

1. Log in with your account on <https://dec.sitefinity.com>
2. To create a new data center, navigate to *Administration » Data centers*.
3. Click the *Create data center* button.
4. Enter a valid name, and optionally a description, of this data center.
5. Once you create the data center, you choose from which data source systems to import and accumulate data, usually from Sitefinity CMS.

STEP 2: Plug Data in Sitefinity Digital Experience Cloud

Depending on your scenario, the configuration steps for getting the right data differ.

- [Plug data from Sitefinity CMS website](#)
- [Plug data from non-Sitefinity CMS web site or a mobile app](#)
- [Integrate other systems such as CRM](#)

A. Track Your Sitefinity CMS Website

Prerequisites

You need to have a Sitefinity CMS sandbox or an already installed Sitefinity CMS instance. In case you have your own instance, you need to have Telerik credentials. For more information, see [Access DEC](#).

Connect to Sitefinity Digital Experience Cloud

You use the dedicated connector in Sitefinity CMS, which handles data input from your Sitefinity CMS instance to the cloud. Data is derived through tracking the behavior of website visitors. In addition, the connector enables you to personalize pages in Sitefinity CMS based on personas and campaigns defined DEC. Once you connect, Sitefinity CMS starts sending all tracked usage data to Sitefinity Digital Experience Cloud.

To connect:

1. Navigate to *Administration » Connector for Sitefinity Digital Experience Cloud*.
2. Enter your Telerik credentials.
3. Click **Connect**.

You can choose what visitor activities to track and in what specific sub-domains or sites. For more information, see [Connect to Digital Experience Cloud](#).

Collect contact details

You review the details of the known contacts through the contact profile of Sitefinity DEC. The layout of the profile consists of a set of default contact properties and your custom ones. The profile can be rearranged at any time according to your preferences. You can also populate the contact profile with details gathered via forms on your Sitefinity landing pages.

To do so, via form properties, you first enable form data submission to DEC and then map form fields data to specific DEC contact properties. You can map any form field to any DEC contact property, including the custom ones. For example, in a *Download this whitepaper* form, you can map the entry to *Your role* field to the respective *Role* contact profile property in DEC and benefit from this lead information.

For more information, see:

- [Contact profiles](#)
- [Track and send form data to DEC](#)

RESULT

DEC starts tracking your website and within 24 hours, you get your first marketing metrics reports. You can start using the system with the latest interactions automatically populated in the Sitefinity Digital Experience Cloud screens.

In addition, you will be able to see the highlights of your marketing reports in Sitefinity CMS under *Marketing -> Sitefinity Digital Experience Cloud -> Insights*.

To enhance the basic website tracking, which is already running, you can:

- Add new or custom [event handlers](#)
- Use the [JavaScript SDK](#) for configuring fully customized interaction tracking
- Upload data through [Google Tag Manager](#)

B. Track Non-Sitefinity Websites or Mobile Apps

If your website is not running on Sitefinity CMS, or you want to track the customer experience in your mobile apps along with the website, you can leverage the DEC JavaScript SDK. You can configure tracking directly in the website HTML but if you are already using Google Tag Manager you do not have to change the current configuration, you can simply [reuse the Google tags you've already defined](#).

C. Integrate with Other Systems

If, in your scenario, data is spread across disparate systems, you will need to integrate Digital Experience Cloud with the systems to capture and analyze the entire customer journey. To do this, you can either use the RESTful API and the various SDKs that the DEC supplies, import data or leverage the out-of-the-box connectors for Salesforce and Oracle Eloqua. For more information, see [Data integration](#).

STEP 3: Start Playing with the Scoring Models

To start using reports and insights and measuring the success of your marketing efforts, we recommend creating:

- [Personas: Profile your audience](#)
- [Lead scoring: Align marketing to sales](#)
- [Conversions and touchpoints: Measure rates and attribution](#)

STEP 4: Examine Reports and Insights

Depending on which reports and scoring models you defined for your data center, and what data is already collected, you will see different results on your main dashboard. For example, if you did not create any personas you will not see a Personas trend section in your data center dashboard. Keep in mind that to get meaningful insights data needs to be accumulated for a minimum of several days, and for more complex setups could require several months, depending on the length of your scenarios (e.g. sales cycle, website conversions timeframe, etc.). All statistics available in the dashboard are refreshed daily. For more information about the reports in the dashboard, see [Analytics dashboard](#).

When you have your conversions defined, and enough data is , you will get reports and predictions of what campaigns and activities bring higher potential conversion rates. For details, see [Conversion and attribution reports](#).

STEP 5: Configure Personalization or Run Email Campaigns

When creating personalization segments in Sitefinity CMS, besides simple contact traits, you can base the segments on any persona or campaign that you defined in DEC. Thus, you can serve personalized content to visitors that are representing, or associated to, a certain persona or part of a specific campaign.

For more information, see:

- [Personalization by persona in Sitefinity](#)
- [Personalization by campaign in Sitefinity](#)

Useful Resources

- [Data-Driven Marketing eBook](#)
- [Managing and Personalizing a Multichannel Experience webinar](#)
- [360-degree Customer Profiles with Sitefinity CMS and DEC blog](#)
- [Sitefinity Digital Experience Cloud documentation](#)
- [Sitefinity Digital Experience Cloud home](#)
- [Your Go-To Guide for Web Personalization with Progress Sitefinity](#)