Progress® Sitefinity®

Welcome to Sitefinity Insight – Your Complimentary Onboarding Plan

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GUIDE

This brochure provides an overview of the Sitefinity Insight onboarding program. The onboarding program aims to facilitate the initial customer success with Sitefinity Insight and help the customer create a roadmap of how Sitefinity Insight will help measure and optimize the planned marketing activities. This onboarding program is geared mainly towards marketing and business roles, however it is recommended that it be shared with all project team members.

Additionally, we also include initial helpful references and resources that may answer some of the most frequently asked questions and help familiarize you with Sitefinity Insight concepts terminology.

Invitations and Users Access

Within a week of your purchase of a Sitefinity Insight subscription, the license holder will receive a Welcome e-mail with initial instructions for Sitefinity Insight setup. The initial setup steps are summarized in the Quick Start Guide for Admins.

Learn more

→ Sitefinity Insight Quick Start Guide for Admins

→ User management in Sitefinity Insight

Your Onboarding Program

Initial Onboarding Meeting

As the first step of the onboarding, you and your team will be invited to an introductory onboarding session. The purpose of the session is o introduce you to your designated onboarding facilitator & the Sitefinity Insight team and to answer any Insight-related questions to date t. In the meeting we will also review the phases of the Onboarding Program. The agenda for this meeting covers:

- Introductions
- Onboarding Program Phases
- Your Sitefinity project status
- Discovery session planning

Discovery Session

The onboarding facilitator with schedule a discovery session to gather more details around the martech landscape within your organization, covering topics such as:

- What market research have you undertaken to date (Personas, trends, SWOT etc)?
- What is our marketing technology stack?
- What are your current marketing channels?
- What does a typical marketing campaign consists of (digital perhaps)?
- What does a typical customer journey look like?
- Who are the key stakeholders to be involved in the onboarding program?
- How are your marketing KPIs are currently measured?

The above topics, should only act as a guide, and as much or as little can be provided. The more information shared, the better the Progress team will be able to tailor the engagement to your team and organization.

Stakeholder Workshops

The stakeholder workshop will be run remotely over two sessions (more if required). The aim of the workshop is to gather your requirements from marketing and business teams, identifying the necessary data points, that will assist in developing an initial Sitefinity Insight configuration blueprint for your organization.

This sessions will cover:

- **Session One**
  - What exactly is Sitefinity Insight?
  - Interactions – What are the ways in which your customers interact with your organization?
  - Conversions – What are the key outcomes that drive your business or strategic objectives?
  - Touchpoints – What are the ways in which marketing and other departments drive those conversions?
  - Customer Segments & Prioritization – What are your different customer segments, and which should be prioritized for personalization?

- **Session Two**
  - Behavioral Profiling with Insight:
    - Personas Journey Stages (Lead Score Types)
  - Segment Identification Methods
  - Personalization Tactic Brainstorming

→ Learn More:
Contacts
Segments
Personas
Touchpoints And Conversions
Personalization

Solution Planning

In this phase the Sitefinity Insight team collaborates with your own to analyze the information gathered during the workshop sessions. This key deliverable being to develop the initial implementation blueprint for Sitefinity Insight. This blueprint will be reviewed and signed off by both teams, prior to proceeding to the next phase.

Measurement

In the Measurement phase, you will configure all data points specified in the blueprint within your Sitefinity Insight instance. This will include:

- Conversion
- Touchpoints
- Personas
- Lead Score Types
- Visitor Segments
- Personalization Segment Validation

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Your Sitefinity Insight team will enable and train your team configure Sitefinity Insight in line with the blueprint.

Personalization and Optimization

With baseline metrics established, this phase sees the implementation of personalization tactics designed in the workshop as well as any optimization opportunities uncovered. The Sitefinity Insight team will work with you to ensure that your content team is able to execute on each tactic.

Learn from Data & Iterate

In this phase we will review some of results of the implementation. Together both teams, will walk through the various reports and identify actionable insights provided by Sitefinity Insight. Progress will work with your team to ensure that they are comfortable deciphering these results and determining the next appropriate course of action. Ultimately this is where we hope to see conversion rate uplift!
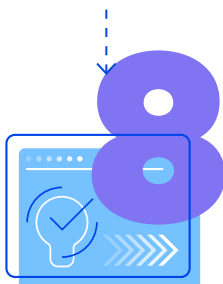
Onboarding Close & Transition to Ongoing

At the end of your onboarding program, we will host a meeting together with your account manager where we will review the playback the onboarding process, and talk through the wins the process taken to get there. This will be your last meeting with your Onboarding Facilitator.

Contact Technical Support

If you encounter a challenge with Sitefinity CMS & Sitefinity Insight and need help to quickly resolve your issue, contact the Sitefinity Technical Support Team by either logging a support case, or obtaining assistance via phone. If you're not sure how to do this, see How to log a Sitefinity support case or Sitefinity Phone Assistance. For complete information about support offerings, issue severity levels, and how to log and manage your support cases, see the below links:

- How to Add and Manage Licensed Users to Log Support Cases
- How to Collaborate on Support Cases
- Scope of Support
- Benefits of Sitefinity Mission Critical Support
- All Other Sitefinity Support Plans
- Issue Severity Levels

For complete Support information, see the Sitefinity Support Guide.

Access Additional Resources

- [Knowledge Base Portal](#)
- [Sitefinity Support and Learning](#)
- [Progress Community](#)
- [Sitefinity Customer Validation Program](#)

Get Additional Product Training and Services

If you need help in areas that are outside the scope of our Technical Support Team, contact your Progress Account Manager, to discuss the available consulting services.

Progress offers a wide range of consulting and training services, as well as assistance with application development and product customization. You can explore the opportunities for collaboration with our [Professional Services](#) team, and if interested in Sitefinity Consulting, please [Submit an Inquiry](#).

→ **Learn more** about Sitefinity Insight

About Progress

Progress (NASDAQ: PRGS) provides the best products to develop, deploy and manage highimpact business applications. Our comprehensive product stack is designed to make technology teams more productive and we have a deep commitment to the developer community, both open source and commercial alike. With Progress, organizations can accelerate the creation and delivery of strategic business applications, automate the process by which apps are configured, deployed and scaled, and make critical data and content more accessible and secure—leading to competitive differentiation and business success. Over 1,700 independent software vendors, 100,000+ enterprise customers, and a three-million-strong developer community rely on Progress to power their applications. Learn about Progress at www.progress.com or +1-800-477-6473.

Worldwide Headquarters

Progress, 14 Oak Park,
Bedford, MA 01730 USA
Tel: +1-800-477-6473

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