



GETTING STARTED WITH SITEFINITY DIGITAL EXPERIENCE CLOUD

Introduction

In the modern digital world, customers interact with your company through a growing number of channels, each typically accumulating customer data in a disparate system. No matter what channel they choose, customers expect a personalized, seamless and continuous experience regardless if they are moving from their phone to tablet to laptop. Progress® 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, providing data-driven insights which suggest how to 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 known contacts interact with your brand
- Personalize your website, mobile apps, or email campaigns based on dynamic scoring models for both known and anonymous contacts
- 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 contact based on innovative prescriptive analytics

Sitefinity DEC also helps you answer marketing and business questions such as:

- Who are our customers?
- How does a customer interact with our organization across channels?
- What part of our audience belongs to a given 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?

While suitable for any CMS platform, Sitefinity DEC is integrated with Progress® Sitefinity™ Content Management System (CMS) out-of-the-box, which enables you to easily import contact characteristics and behavioral data from your Sitefinity CMS site. Using this data Sitefinity DEC calculates reports and derives recommendations, which you can incorporate into your campaigns. You can also track third-party websites by utilizing a JavaScript SDK or the RESTful API, which can integrate directly, or using Google Tag Manager.

To get the most out of the Sitefinity DEC, we recommend plugging in other data sources, for instance, a CRM or email marketing system. To do so, leverage the open SDKs and APIs, or for faster integration leverage the Sitefinity DEC data connectors for Salesforce, Microsoft Dynamics CRM, or Oracle Eloqua.

Workflow

To get started, login and create a data center in which contact data is stored. Sitefinity DEC processes and calculates the 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 contacts and deliver personalized content for each segment, you can utilize the persona scoring models or prescriptive “Best Next Experience” recommendations.

1. Log in to Sitefinity DEC and create a datacenter
2. Depending on your scenario, plug data from Sitefinity CMS 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
 - Apply changes in current digital assets

STEP 1: Log In And Create a Datacenter

Once you register on www.telerik.com or www.sitefinity.com, you'll have the required account credentials. Keep in mind that the first time you log in to Sitefinity DEC, there will be no data centers created, and therefore, no data to produce reports. You need to create datacenters and plug data into centers to begin accumulating data. By creating a datacenter, you have a dedicated data entity to encapsulate data from specific data sources. After you create the datacenter itself, you will be supplied with a unique API key to connect your Sitefinity instance, or other systems, to the datacenter.

To create a datacenter:

- Log in with your Sitefinity account on <https://dec.sitefinity.com>

1. To create a new datacenter, navigate to Administration » Datacenters
2. Click the Create datacenter button
3. Enter a valid name, and optionally a description, of this datacenter
4. Create the datacenter; once you create the datacenter, you need to choose which data source systems to import and accumulate data, usually from Sitefinity CMS

STEP 2: Plug Data in Sitefinity DEC

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

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

A. Track Your Sitefinity Website

Prerequisites

You need to have a Sitefinity sandbox or an already installed Sitefinity instance. In case you have your own instance, you need to ensure that the module **Connector for Digital Experience Cloud** is installed. For more information, see [Activate and deactivate modules](#).

Connect to Sitefinity DEC

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

To connect:

1. Navigate to Administration » Connector for Sitefinity DEC
2. In the datacenter API Key field, enter the API key of the datacenter you are connecting to
3. Under Connection details, enter the following:
 - Connection name
Enter the URL or the name of the site that is your data source; the connection name is used in Sitefinity DEC to distinguish data from this site from data coming from other sources
NOTE: Use up to 20 characters, use only Latin letters, numbers and “_”, “-”, and “.”
 - Progress name and Progress password
4. Click **Connect**

For more information, see [Connect to Sitefinity DEC](#)

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. It can be rearranged at any time according to your preferences.

You can populate the contact profile with details gathered through the Sitefinity forms. For this purpose you set the FieldName properties of the form widgets. A form widget is mapped to a contact property when its FieldName value matches the contact property name.

To do so:

1. Navigate to Content » Forms.
2. Open a form for edit.
3. Click the Edit button of a widget that will feed a given contact property.
4. Click Advanced.
5. Type the name of the property in the FieldName textbox.

6. Click the Save button to save the new setting and to close the Advanced view.
7. Click the Save button to close the widget settings.
8. Click the Publish button to publish the form.

For more information, see [Contact profiles](#) and [Configure contact properties](#).

RESULT

Sitefinity DEC starts tracking your website within 24 hours. You may [start using the system](#) with the latest contacts and interactions automatically populated in the Sitefinity DEC screens.

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

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

- Add additional connectors for [custom events](#)
- Use the JavaScript SDK for configuring fully customized interaction tracking
- Reuse your existing [Google Tag Manager tags](#)

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 Sitefinity 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 Sitefinity DEC 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 Sitefinity DEC supplies, or leverage the out-of-the-box connectors for Salesforce, Microsoft Dynamics CRM and Oracle Eloqua. For more information, see [Data integration](#).

STEP 3: Start Playing with the Scoring Models

To start using reports and insights and gauging which functionality matches your marketing needs, 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 models you have defined for your datacenter, and which data has already been captured, 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 datacenter dashboard. Keep in mind that to get meaningful insights data needs to be accumulated for a minimum of several days, and for more complex uses 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 [Datacenter dashboard](#).

When you have your conversion tracking reports defined, and enough data is already accumulated, you will get reports and predictions of what campaigns and activities bring higher potential conversion rates. For details, see [Conversions 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 predictive campaign that you defined in Sitefinity DEC. Thus, you can serve personalized content to contacts 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](#)
- [Lead and Persona scoring webinar](#)
- [Why Personalized Digital Marketing Hasn't Worked... Yet](#)
- [Sitefinity Digital Experience Cloud documentation](#)
- [Sitefinity Digital Experience Cloud home](#)