Your Go-To Guide for Web Personalization with Progress Sitefinity

EBOOK

Introduction

It is hard to believe that there once was a world without personalization. A digital world, that is. Nowadays, personalization is a fundamental component of any strategic digital marketing initiative. Creating a true personalized experience for website visitors brings better engagement, which ultimately leads to more revenue to your business.

As a digital marketer, you may be well familiar not only with the who, what and how of personalization, but also with the accompanying challenges of defining proper segmentation, choosing the right digital asset to personalize and understanding what actually worked well and what did not.

In short, creating and delivering an effective personalized experience tuned to the needs of your company is anything but a walk in the park.

The following guide will refresh personalization fundamentals and show you how **Progress® Sitefinity™ CMS** and **Digital Experience Cloud (DEC)** help you manage, organize, and deliver personalized content, as well as measure and improve the impact of personalization efforts. A few practical examples will hopefully make it easier to put matters in the proper perspective.

**The main concepts that we will cover are:**
- segmentation
- conversions
- personas
- leads
- marketing funnel
- scoring models
- tracking

We will follow the typical flow:
- defining your audience
- understanding the key touchpoints and interactions of your visitors
- personalizing the page presentation and page content
- summarizing results in specialized reports and...
- doing it all over again

The good part is that Sitefinity CMS and DEC "do the magic" and take care of the difficult stuff. All you need to do is define and segment the audience and include the personalized content or layout in Sitefinity CMS. You then leverage DEC to track and measure the results of the personalization campaign.

So, let's jump in.

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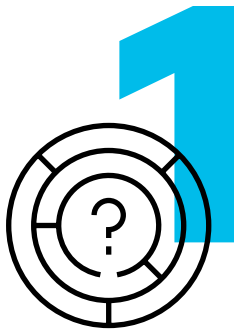
Why Personalize?

Everyone wants to get the attention they deserve. This is what you want your visitors to experience, starting from the very first click, throughout their interactions with your site until they become your customers—and hopefully long after.

Presenting your visitors with the most interesting and relevant personalized information, services or product promotions at the right moment and in a specific context on your website can greatly increase their engagement and, subsequently, conversions.

In the early days of digital marketing, conversions represented a simple step of visitors purchasing something online ("converting a lead to a customer") but today, conversions have a much broader meaning that depends on the nature of the website and the nature of your company's business. In most cases, conversions (a.k.a. goals) can be viewed as meaningful steps in your visitors' journeys that you would expect to lead to a commercial event. This event may or may not happen on the website—it may not even be "commercial" in the simple sense of the word. It's simply an event that drives your business forward.

Visitor journeys are increasingly getting longer and more complex, and they're also increasingly happening on the visitor's own timeline. As a result, what is viewed as meaningful conversions has shifted. It may include registering on the website, downloading certain files/interacting with other assets, requesting information, joining a community, registering for a demo—you get the idea.

Ultimately, conversions, when properly defined, provide one of the most important metrics on the effectiveness of your personalization efforts and the level of engagement of your audience.

Much like a journey of a thousand miles and its first step, identifying your most important prospects starts with tracking their first conversion and building a lasting "conversation" with them from this moment onward. The objective of personalization can thus be summarized as Improving the conversions you define via conversations with a personalized approach.

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Personalize for Whom?

If you are already convinced personalization needs to be part of your web marketing toolbox, the next important question is **who** you are personalizing the experience for—that is, **who are your prospects and customers**. That is a deceptively simple question that often does not get enough attention, nor is it subjected to strenuous due diligence when answering it.

The very first challenge is that you may not know exactly who your primary audience is (or, as is often the case, you think you know but your assumptions aren't as accurate as you'd like to think).

You group and divide your audience based on specific characteristics, so that you can target the different types of visitors with tailored and relevant content. You can personalize experiences for anonymous and new visitors, returning visitors, leads, prospects, customers, marketers, developers or any other way you define your audience. Each segment or group represents an established market and an audience with its own targeted needs. A segment encapsulates one or more visitor characteristics that can be extracted from three types of visitor data that you collect:

- **Demographic data**
  The visitor's profile, personal details and settings. Generally used to customize a website or service according to the specific user preferences.

- **Behavior data**
  Visitor's behavior and interactions are tracked, their data collected and used for personalization. Generally used to further hone the experience—for example, to guide the visitor to specific products, content or other pages.

- **Hybrid data**
  Mix of elements of both types of data, such as time, IP address, preferences and interactions to understand the visitor's journey and context better.

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However, the challenge lies not in targeting a group but targeting an individual by anticipating the visitor's needs and requirements using their own data. Thus, visitor profiles used in personalization in Sitefinity CMS are a blend of demographic, behavioral and contextual data.

In Sitefinity CMS, you collect visitor data using session IDs and various browser information. Even when visitors are not logged in, each action they take on the website is tracked by DEC and identified uniquely. This helps you base your segment and persona definition not only on the **market research** and the **current customers,** but on **collected data** as well.

By combining the following key segmentation methods and scoring models to group user characteristics, you **understand the context** of the visitor, so that you **target the right customer segment and build powerful conversations** with the person visiting your website.

- **Customer journey**
  The customer journey **connects and maps all touchpoints and interactions** (whether they are visits, clicks, calls or website activity) and provides a unified overview and understanding of website visitors' actions and behaviors.

  Collecting a reasonable amount of data on the customer journey allows you to define **personas**. Personas bring the segments to life and mimic a real customer or prospect. You associate a persona not just to a segment but to specific behaviors, attitudes, motivations and values.

- **Sales funnel**
  The sales funnel depends on the sales model and defines who your most prospective contacts are from sales point of view. Similar to the customer journey, collected data allows you to devise a **lead scoring** model that helps you associate a visitor as a prospect, opportunity or qualified lead.

NOTE

Be aware that visitor journeys and interactions, as well as purchase decisions, differ quite substantially between individual prospects and companies. Whereas in B2C scenarios, you target the individual throughout the sales funnel and customer journey, in B2B personalization, you target different decision makers in different roles in a much more fragmented marketing funnel.

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3 Personalization Options in Sitefinity CMS and DEC

The following table lists the characteristics you can use to segment your audiences in Sitefinity CMS, as well as the phase in the customer journey for which such type of segmentation makes the most sense. Additionally, to provide you with more context, we've included an example for each characteristic that illustrates personalization in action. For this scenario, we'll pretend to be an educational institution looking to engage diverse audiences, such as faculty, alumni, students, prospective students and so on.

Table legend

Segment characteristic:
The parameter via which you distinguish visitors and categorize their interactions with your website.

Suitable for:
Depending on the step of the customer journey, some personalization types, segment characteristics and opportunities make more sense than others. The list below summarizes the general customer journey steps:

- Awareness
- Interest and intent (Lead generation)
- Consideration and evaluation upon identification (Lead nurturing)
- Purchase (Sales)

Personalization type:
- Contextual (real time personalization)
- Historical (demographic and behavioral)

Keep in mind that both types are real-time personalization since they occur while the visitor is browsing your site. For ease of understanding, *Real Time* in the table below refers to personalization using data that you acquire right at the moment of visitor interaction, as opposed to the historical data you've already collected about them.

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Segment characteristic	Suitable for	Personalization type	Example/situation/asset
IP Address IP address is the unique address corresponding to the location of each visitor. You can group visitors by a single IP or a range of IP addresses.		Contextual (Real Time)	Useful for reaching targets in a certain area. For example, promoting open-doors events to local visitors or, based on the IP range of a top IT company in the country, personalize the message for an MBA program to its employees.
Location Where the user is physically located—country, city, etc.		Contextual (Real Time)	Recommend local events, such as an alumni gathering for alumni in the city/country.
Query Parameter of Visited URL Personalize based on a particular campaign or marketing effort that brings traffic to your site. You basically group visitors based on how they found your content.		Contextual (Real Time)	In case visitors found your content via a LinkedIn campaign (initiated by social media) for recruiting teachers, it would make sense to take visitors to the Faculty page. Or, based on a search query, say, computer science, you can display the search results page targeted CTAs to visit the Computer science department page.
Referral URL The URL of the page, from which the user was redirected to your site		Contextual (Real Time)	Diversify the content you show based on the referral source. For example, show Facebook-referred users links to your Instagram account, events list, etc., show your Google users a link to your Facebook page. You can then use the Contains logical operation to group all users referred by a specific domain, such as www.facebook.com, without having to enter the exact URLs separately.
Time of Day The time at which the user browsed your site.		Contextual (Real Time)	Show the schedule of a lecture room for the remaining part of the day.

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Segment characteristic	Suitable for	Personalization type	Example/situation/asset
Landing URL The page from your website that the user was redirected to from an external website.		Behavioral (Historical)	Indicates the interest area of the visitor. For example, if the visitor landed on the www.university.edu/spring _semester, this most probably is a prospective student. You can personalize a CTA, for example, download the brochure or list the programs and application process.
Visit Duration The duration of the user session.		Behavioral (Historical)	If a visitor spent substantial time on the website, emphasize on a CTA, such as a Call Us button or a contact form.
Visited Page A page that was visited by the user.		Behavioral (Historical)	Say a visitor already saw the *Research Opportunities page*. You show them the Postgraduate Programs information, research news and entrepreneurship programs.
DEC Persona		Behavioral (Historical) and Demographic	You can combine behavioral (historic interactions) and demographic (any DEC contact profile property) characteristics to define DEC personas. Based on the persona identified, for example, *Medicine Major Prospect,* or *Computer Science Major Prospect,* show information about application process, scholarships, alumni success stories. And, based on contact characteristics, say, *Additional certifications acquired,* provide visitors with tailored to their qualification's curriculum.
DEC Lead Scoring Type		Behavioral (Historical)	Say a visitor scored points, based on definitive intent for signing up for an online certification course. You show them the application form and discount rates if they sign up for more than one course.

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Segment characteristic	Suitable for	Personalization type	Example/situation/asset
DEC Campaign		Demographic (Historical)	Your university might want to issue a campaign for collecting money for scholarships. In such case, you can create a campaign with conversion "Donate" and select an interaction for visiting the "What You Get When You Donate" page.
Profile Fields The built-in and custom fields of a Sitefinity user profile. Can be applied only to registered users.		Demographic (Historical)	Create a custom field for the age or country of the prospective student and show them information about scholarships for which they are eligible. Create a custom field for the student's major and navigate them to the portal where they can see all available resources.
Roles Group visitors based on the role they are assigned to. You can define roles, such as Student, Alumni or Faculty, Researcher and assign users upon registration on your site.		Demographic (Historical)	Show upcoming campus events to students. Show faculty meetings to teachers.
Purchases The purchases that the user has made from your website		Behavioral (Historical)	Online course recommendations based on other purchased courses, shows related and complementing courses in the track. Even more— offer specialization!

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Personalize What?

After you identified who you are having a personalized conversation with, you need to figure out what is it that you want to say and how to frame it to achieve the best results. To support this, Sitefinity CMS enables you to personalize separately or together:

- **Content:** Text, media, titles, recommendations, CTAs, buttons, landing pages
- **Presentation:** Colors, layout, styling

The atomic elements of every digital experience are strong, reusable and sharable content pieces. Thus, a best practice in Sitefinity CMS is to separate presentation from content, so that you can reuse the content pieces across pages, CTAs, channels and segments. Further, Sitefinity CMS enables you to add parameters to content, such as differing titles, messages, descriptions, images, location-based CTAs or persona filters, thus making the job of maintaining content much easier than creating new pieces for each persona or location.

EXAMPLE

For example, if you have videos targeting different audiences, you would want to filter this: a visitor identified with the *Prospect Student* persona will see a list of videos for the different undergraduate programs and an *Alumnus* persona will see a list of videos with opportunities to engage with their alma-mater. For interactions that require modified content, you want to change the CTA based on whether a visitor already registered for a newsletter or participated in a webinar, for example.

Based on your personalization goals and scenarios, you may choose to personalize the whole page, sets of pages, or part of a page. When a small part of the content needs to be tweaked to serve different purposes or segments (say, a greeting text, a banner, or a button), you will want to personalize just one or more widgets of a page, as opposed to the whole page. Of course, based on your scenario's requirements, you can add and personalize any custom widget as well, for example, a custom form to capture prospects' lead data.

With Sitefinity CMS and DEC, you can easily personalize pages, page templates or individual widgets with just a few clicks. In fact, almost all Sitefinity CMS content widgets can be personalized out-of-the-box, and guidelines for custom widgets include options for supporting personalization.

To go back to the example of personalization by *Query parameter of visited URL* where you display a targeted CTA on the search results list based on the search

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term, to implement it, you can just add a personalized Card widget with information and links to the different department pages:

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To see how to do this yourself, check out the [Personalize widgets](#) and [Personalize widgets on page templates](#) documentation articles.

Alternatively, if you want to change the layout (the page template, that is, design of the page), or the combination of widgets displayed to some of your segments, you can personalize the whole page. Let's get back to the example where you are leveraging personalization based on DEC Persona, and you have defined the *Prospective student* and *Alumnus* personas. On your homepage, you may want to show to *Prospective student* links to your application forms, scholarship information, and interactive campus tours. For the *Alumnus*, you may want to emphasize articles about research opportunities, CTAs for giving back to the community, and alumni gathering events. Additionally, based on an alumnus place of residence (a demographic in the DEC contact profile), you can display to an alumnus only events close by their location.

Besides displaying all this information in different widgets, such as *News* items, *Blog posts*, and dynamic and custom content widgets, you may have a different vision for the presentation and reorder the widgets on the page. In such cases, the most suitable option is to [Create a personalized version of a page.](#)

Personalize and Track

Once the personalization campaign is up and running, you can track and measure how it performs in the automatically generated Personalization reports in DEC. The data will help you analyze the impressions by each of the segments for which you personalized content.

Validating the effect of your personalization efforts, you may realize you invested too much time creating content that supports a personalization approach that only has a mediocre effect on conversions.

You need to make sure you understand where your personalization efforts are going and gauge their positive effect.

Personalization Next Steps

Now that you have the full picture based on the reports and collected data, you can refine and enhance the personalization of your website. For example, you can create a more complex set of characteristics, add or remove segments as well as segment your visitors based on a completely different criterion. Alternatively, you

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can decide to change the personalized content and presentation. For example, you could personalize another part of the page or completely rework the layout.

Measuring the results of how personalized experiences are impacting conversions is the best way to drive iterations and continuously improve strategy where it matters most..
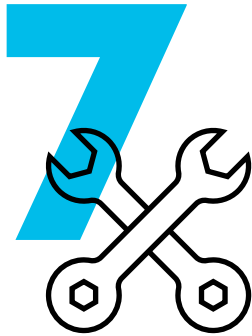
Personalize How?

Let's check what the actual personalization flow looks like:

1. **Decide** what a successful personalization means and define conversions (DEC
   Define a goal you want to achieve and describe what a successful campaign looks like. For example, plot out what pages you want your visitors to view, what resources you want them to download and so on. In other words, you decide on what conversion means based on your desired visitor journey and business goals. You do this in DEC by defining the actual conversions. You can then analyze the conversion rates in the DEC reports.

2. **Define** personas and lead scoring types (DEC)
   Profile your audience and classify the visitors that interact with your company. You can later leverage these classifications when defining audience segments to efficiently optimize your messaging for them. For details on how to do that, see:
   - Personas: Profile your audience
   - Lead scoring: Align marketing and sales

3. **Create** the user segments with the help of user characteristics (Sitefinity CMS
   Use the approach described in the second part of this guide (*Personalize for Whom?*) and our documentation to help you describe your audience. Combine the different characteristics and make full use of the logical operators to ensure that what you have set in Sitefinity CMS corresponds to your vision of the user segment.

4. **Personalize** pages or parts of pages (Sitefinity CMS)
   Revisit the third step of this guide (*Personalize What?*), think of what you need to emphasize on (whether this would be just a highlight or a whole new section) and get creative with the things you want to show! If you are looking for something specific, make sure to first check the Personalize content in our docs.

5. **Preview** the personalized content (Sitefinity CMS)
   When you are done personalizing, see what the experience you deliver to your visitor actually looks like and preview the entire site or a particular page by using the personalization preview tool.

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6. Track visitors (DEC)

Once you setup the Digital Experience Cloud, it starts tracking the performance of your personalization straight away. When you do step five (*Personalize and Track*), DEC will show you useful information to measure the success of your campaign.

7. Analyze reports (DEC)

With the help of your research and the collected data and results, you are now ready to analyze the report and decide on the follow through (as described in part six, *Personalization Next Steps*). Are you personalizing more content? Do you need to refine your segment? Do you need to add other touchpoints?

Getting back to how this whole personalization conversation started—do not stop at addressing your customers by their names or providing them with the information or product they already have. Leverage their needs to present them with what they might be interested in at the right point of time and context and predict their next steps.

Always make room for minor changes in CTAs and informational texts, provide dynamic content, incorporate contextual information and track the engagement and revenue successes and keep in mind that personalization is a long-term investment

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References:

Here are all resources referenced in this paper along with a brief description of each resource:

- [Sitefinity CMS Documentation: User Characteristics](#)
  Lists all out-of-the-box characteristics that can be used to describe the audience when creating personalization segments.

- [Sitefinity CMS documentation: Personalize Content](#)
  Explains how to personalize the content that you picked for your personalizing efforts. The subsections cover details around widget and page personalization.

- [Sitefinity CMS documentation: Use the Personalization Preview Tools](#)
  Demonstrates how to preview the personalization you defined in Sitefinity CMS.

- [DEC Documentation: Personalization—Track, Measure and Compare](#)
  Gives information about the available tools that help you measure the results of the personalization efforts. The sub articles show how to create and read the reports that are generated for each personalized page.

- [DEC Documentation: Measure Rates and Attribution](#)
  Explains how to define and track conversions and touchpoints, so can easily translate your marketing goals into particular actions online.

- [DEC Documentation: Profile Your Audience](#)
  Provides details on how to define and manage your personas as well as more information on how to use the persona scoring rules.

- [DEC Documentation: Align Marketing and Sales](#)
  Shows how to create and manage lead scoring as well as the tools available for defining lead scoring rules.touchpoints, so can easily translate your marketing goals into particular actions online.

→ Learn More

About Progress

Progress (NASDAQ: PRGS) offers the leading platform for developing and deploying strategic business applications. We enable customers and partners to deliver modern, high-impact digital experiences with a fraction of the effort, time and cost. Progress offers powerful tools for easily building adaptive user experiences across any type of device or touchpoint, award-winning machine learning that enables cognitive capabilities to be a part of any application, the flexibility of a serverless cloud to deploy modern apps, business rules, web content management, plus leading data connectivity technology. Over 1,700 independent software vendors, 100,000 enterprise customers, and two million developers rely on Progress to power their applications. Learn about Progress at www.progress.com or +1-800-477-6473.

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