# Configuring Targeting (TBR)

Targeting is a Crafter's feature that allows delivering the right experience, with the right content, to the right people at the right time. Targeting results from the process of:

- Analyzing the business Goals
- Identifying the business Rules
- Identifying sources of criteria like profiles, cookies, session state, etc.
- Modeling content to capture applicability to criteria
- Customizing markup content
- Building Dynamic pages that bring criteria and content together using simple queries and custom services.
- And finally gives authors the ability to preview scenarios

What is a Persona?

A Persona is an archetype of a kind of user, not to be confused with a Profile. Personas are able to hold properties that are not even found in profiles. Each archetype has properties to help the authors remember them: Title, Image and Description, as well as arbitrary properties to represent states.
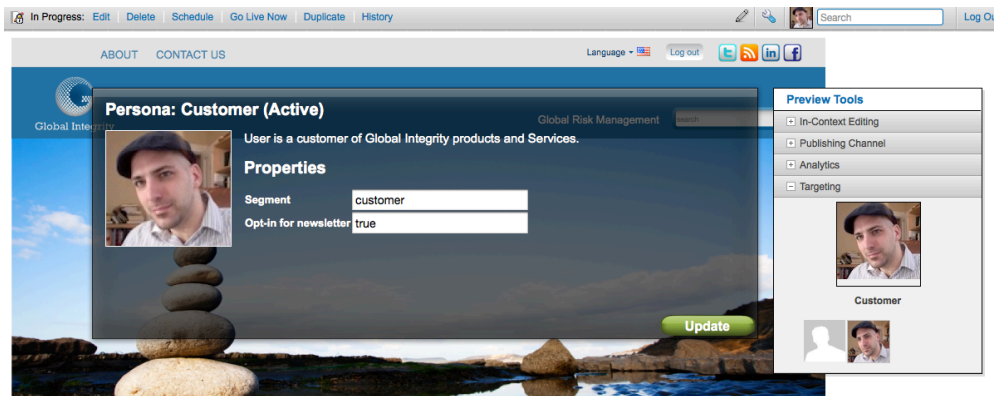
How it works

- Pages and components have business rules that drive dynamic behavior and targeting
- In LIVE environments these rules use values from the profile, cookies, 3rd party systems and so on
- In preview these values come from the persona
- Spring and macros are used to substitute these values

Targeting example: Goals

- The business wants to increase click through rates from the home page.
- Today the home page is too generic given that it serves users with different interests
    - Partners
    - Customers
    - Employees
- Goal: Increase click through / engagement
- Tactic: Target content on home page to the vistor's segment

Targeting example: Business rules

- If the user is not known target content to "Anonymous."
- If not enough content is available for the segment, mix in content targeted to ALL.
- Prioritize content that matches the users segment
- Don't display more than 10 matches

Targeting example: Identify Criteria / Source

- Criteria
  - User Segment
- Source
  - Profile
  - Most likely determined and updated by CRM integration

Targeting example: Model Criteria in Content

Targeting example: Tag the Content

Targeting example: Build Dynamic Components

```
52
53 <#if profile??>
54     <#assign query = searchService.createQuery()>
55     <#assign query = query.setQuery("content-type:/component/tout AND (segments.item.key:${profile['segment']!'Anonymous'}^10 OR
   segments.item.key:All)")>
56     <#assign query = query.setRows(10)>
57     <#assign touts = searchService.search(query).response.documents>
58
59              <#list touts as tout>
60                  <#assign toutKey = tout.localId?replace("sample:","")>
61                  <#assign toutItem = siteItemService.getSiteItem(toutKey) />
62 [${toutItem.headline!""}]
63                  <div class="elem">
64                      <#ice componentPath=toutKey />
65                      <img src="${toutItem.image!''}" />
66                      <div class="museo300">
67                          <h1 class="text-green">${toutItem.headline!""}</h1>
68                          <p>${toutItem.subhead!""}</p>
69                      </div>
70                  </div>
71              </#list>
72 </#if>
73 </div>
74              <a class="carousel-control left" href="#carousel" data-slide="prev">
75                  &lsaquo;
76              </a>
77              <a class="carousel-control right" href="#carousel" data-slide="next">
78                  &rsaquo;
79              </a>
80          </div>
81      </#if>
82
83
84
85          </#if>
```

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Targeting example: The Query

Retrieve items of type TOUT. Match the Profile's segment or use Anonymous as the segment if the profile doesn't have one.
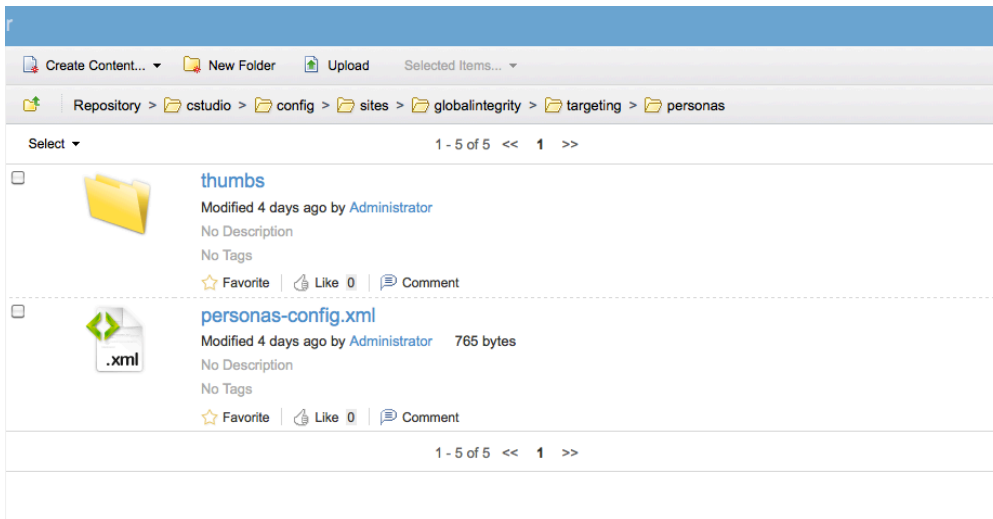
```
content- type:/component/tout AND
(segments.item.key:profile['segment']!'Anonymous'^10 ^10 = Any matches to this part of
the predicate get a boost OR if fine things tagged for everyone OR
segments.item.key:All)
```

Targeting example: Enable Authors to test
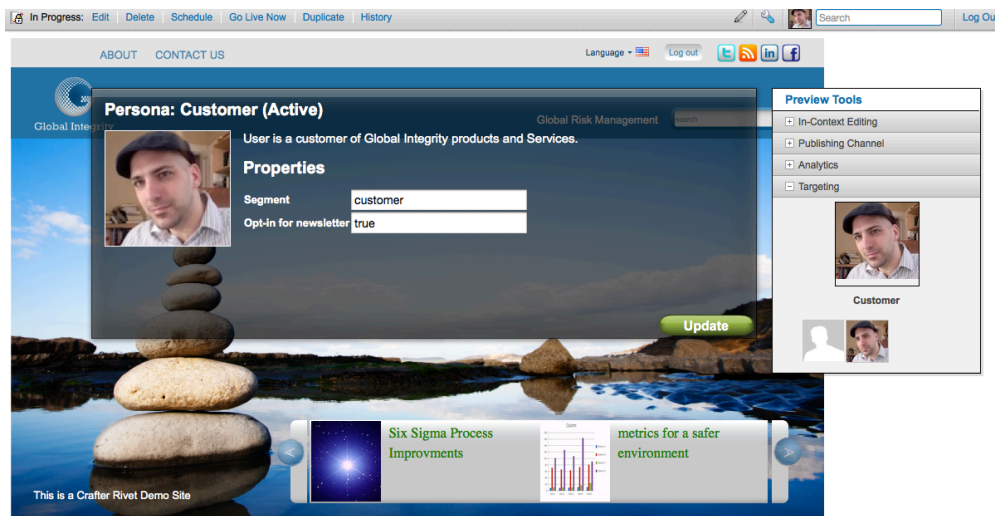
Targeting example: Configuring Personas, personas-config.xml

Create Content... ▾   New Folder   Upload   Selected Items... ▾

Repository > cstudio > config > sites > globalintegrity > targeting > personas

Select ▾   1 - 5 of 5   <<   **1**   >>

☐   **thumbs**
Modified 4 days ago by Administrator
No Description
No Tags
☆ Favorite | 👍 Like 0 | 💬 Comment

☐   **personas-config.xml**
Modified 4 days ago by Administrator   765 bytes
No Description
No Tags
☆ Favorite | 👍 Like 0 | 💬 Comment

1 - 5 of 5   <<   **1**   >>

Targeting example:

```xml
 1 <personas>
 2     <persona>
 3         <name>Anonymous</name>
 4         <description>User is unknown to Acme.com.</description>
 5         <thumb>anon.jpg</thumb>
 6         <settings>
 7         </settings>
 8     </persona>
 9     <persona>
10         <name>Customer</name>
11         <description>User is a customer of Global Integrity products and Services.</description>
12         <thumb>customer.jpg</thumb>
13         <settings>
14             <property>
15                 <name>segment</name>
16                 <label>Segment</label>
17                 <value>customer</value>
18             </property>
19             <property>
20                 <name>newOptIn</name>
21                 <label>Opt-in for newsletter</label>
22                 <value>true</value>
23             </property>
24         </settings>
25     </persona>
26 </personas>
```

Each persona can have an arbitrary set of properties (<settings>).

Image name assumes images are located in sibling thumbs folder next to the persona-config.xml in the repository (<thumb>).

Targeting in the real World

- Validate business rules with goals.
- Measure the effectiveness of your targeting!
- Create A/B or multi-variant tests to help understand and hone your results
- Adjust as necessary