

# SYMPOSIUM 2014

LAS VEGAS



# Architected for Success



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# Architected for Success

Using Sitecore to power our Lead Generation engine

The advantages of component based design to empower personalization, multivariate testing, and design flexibility

Combining website interactions and sales funnel interactions to a single view of the customer

Extracting maximum visibility of our leads and customers throughout the buying cycle

# Architected for Success – Global Challenge

Global architecture required

100+ Marketing employees

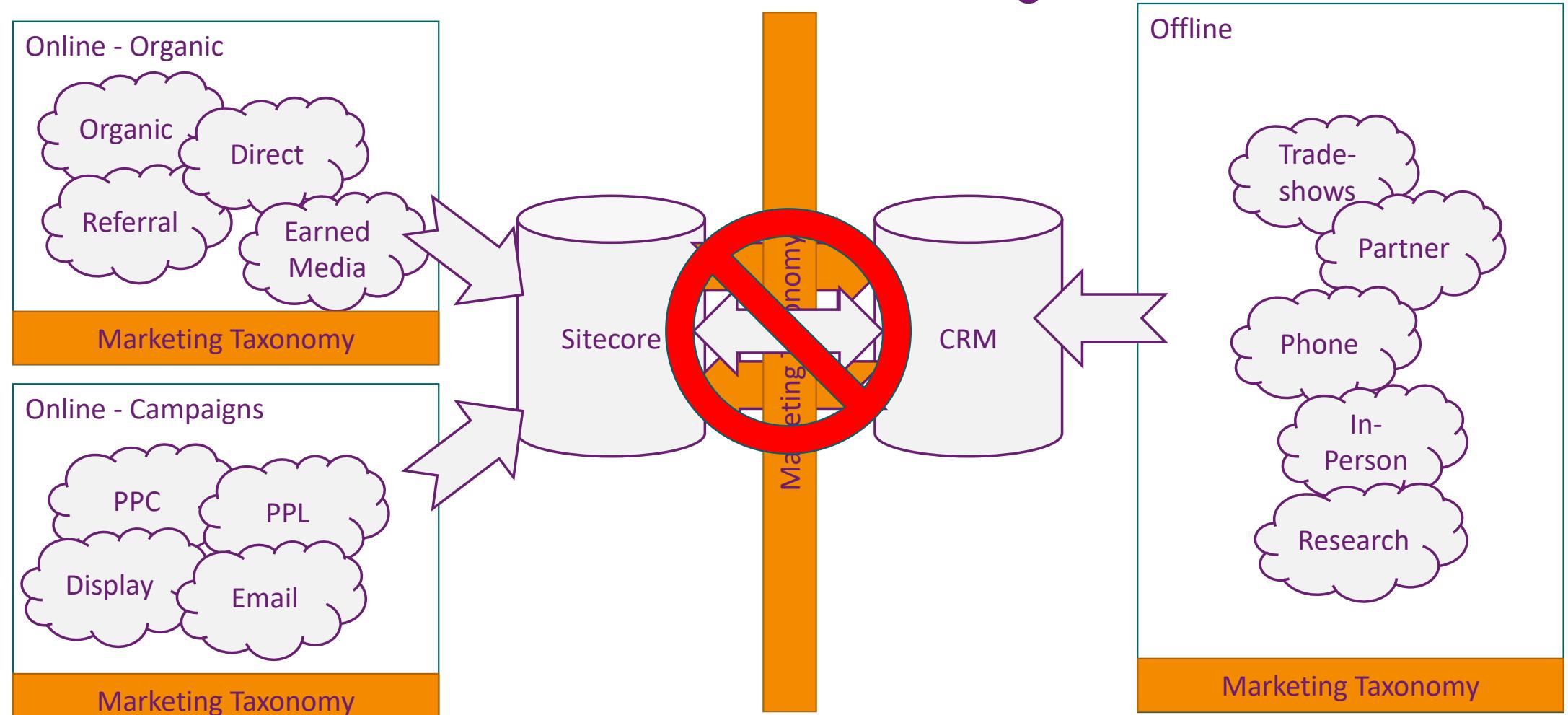
13 languages



# Architected for Success – The Challenge



# Architected for Success – The Challenge



# Architected for Success – Marketing Taxonomy

## Channel

**41.10.02** – Online PPC Google  
**42.20.01** – Offline Event Symposium

## Region

Geographic code for location  
**UK** – United Kingdom

## Campaign Code

Unique identifier for  
multi-touch campaigns  
**US14SYMNA**

## Asset Code

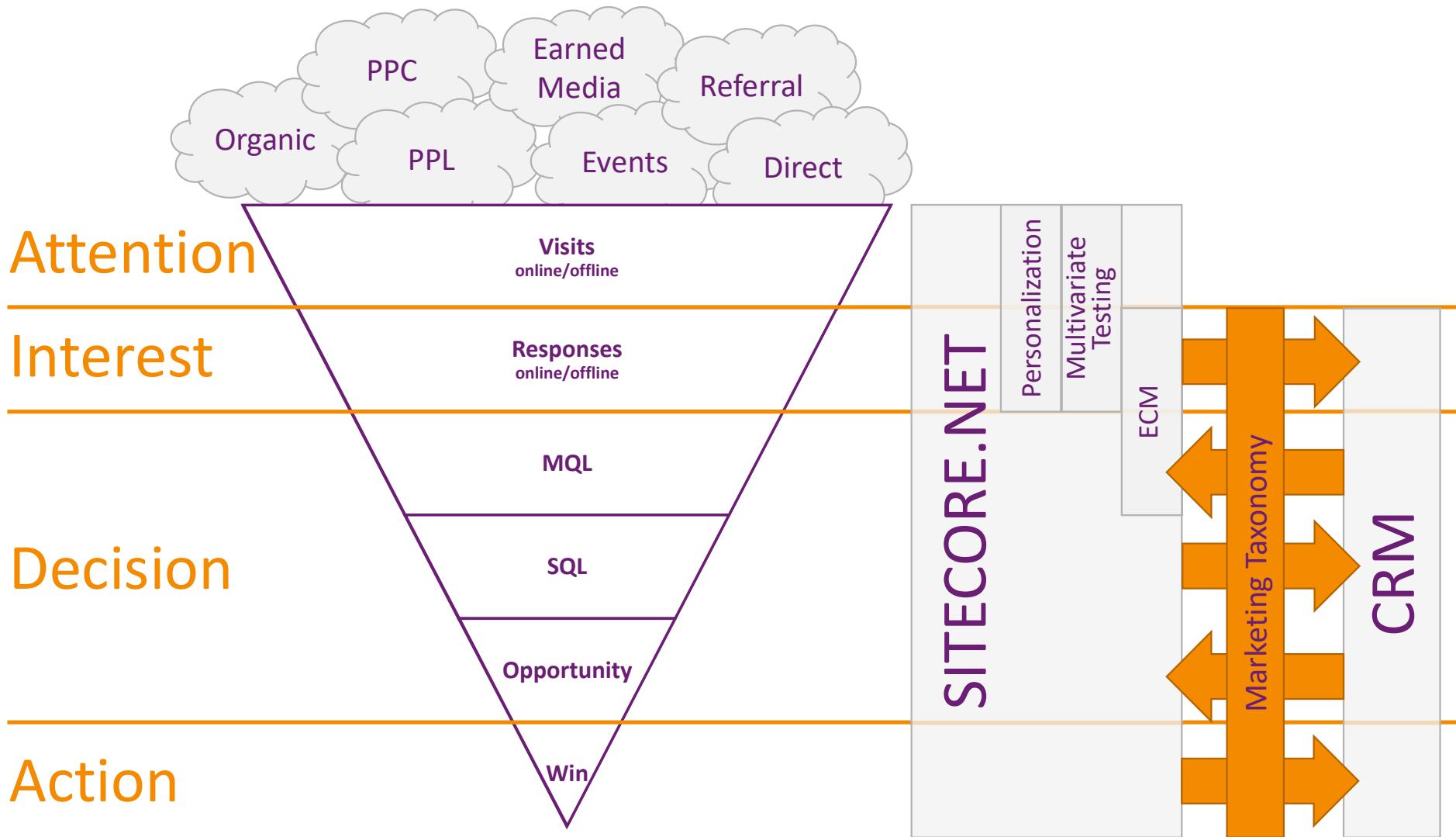
What enticed the prospect to act?  
**SE** – Sitecore Event

## Message Code

Unique identifier for a specific  
go-to-market message

## Goal Categories

Type of goal achieved  
**MCEV** – Marketing Campaign  
Event Registration



# CRM

## CRM Integration To Support The Lead Engine



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# Sitecore CRM Vision

The goal of our Dynamics CRM solution to harness the horsepower created by Sitecore to give valuable and enriching data to our sales with regards to our customers, potential customers, partners, potential partners and our competitors.

Simple Set Up:

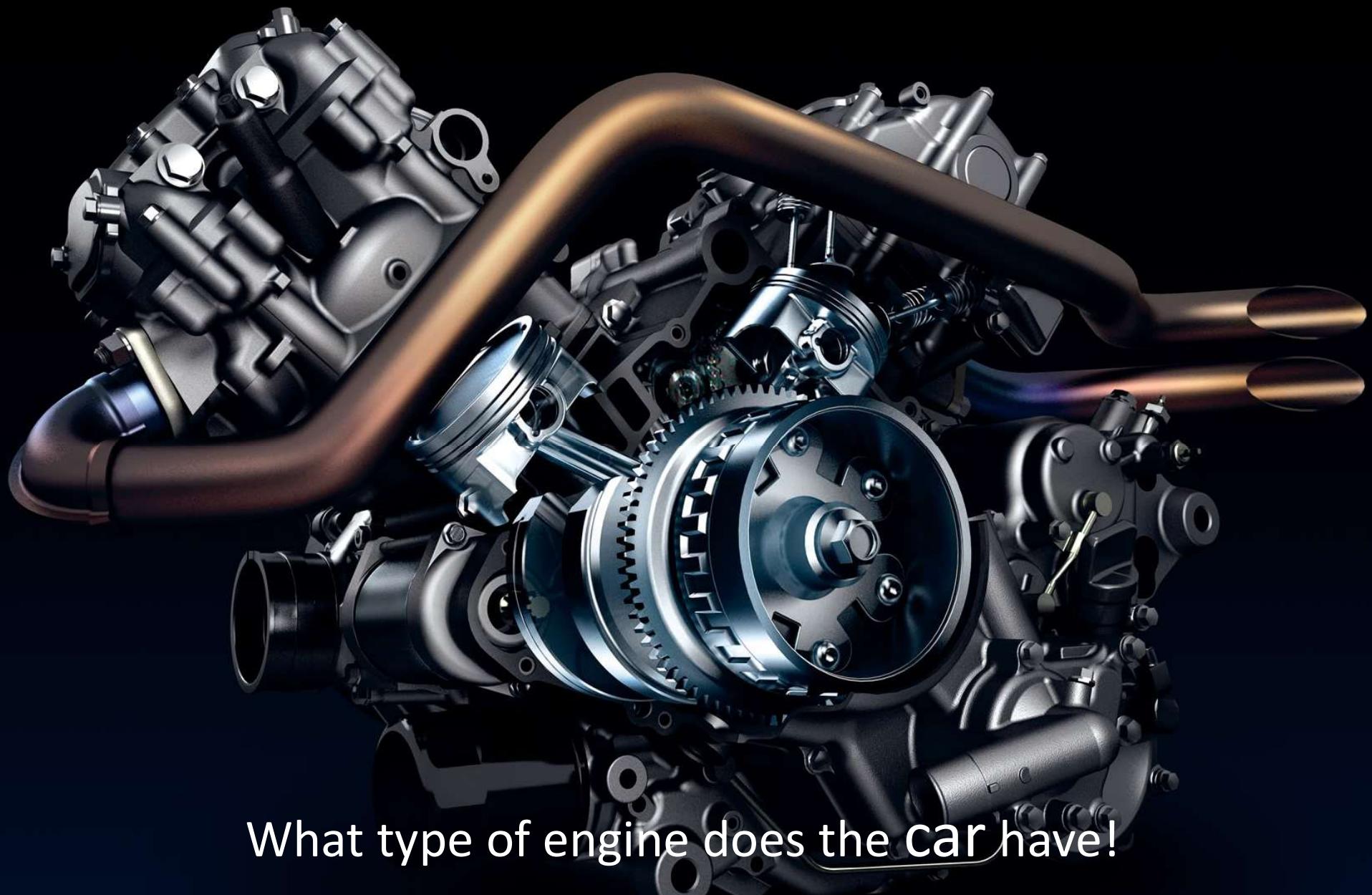
- CRM 2011 On – Premise
- SQL 2008 DB – 160GB
- 9 Business Units
- 600 Users
- Outlook and Web



Microsoft  
Dynamics CRM

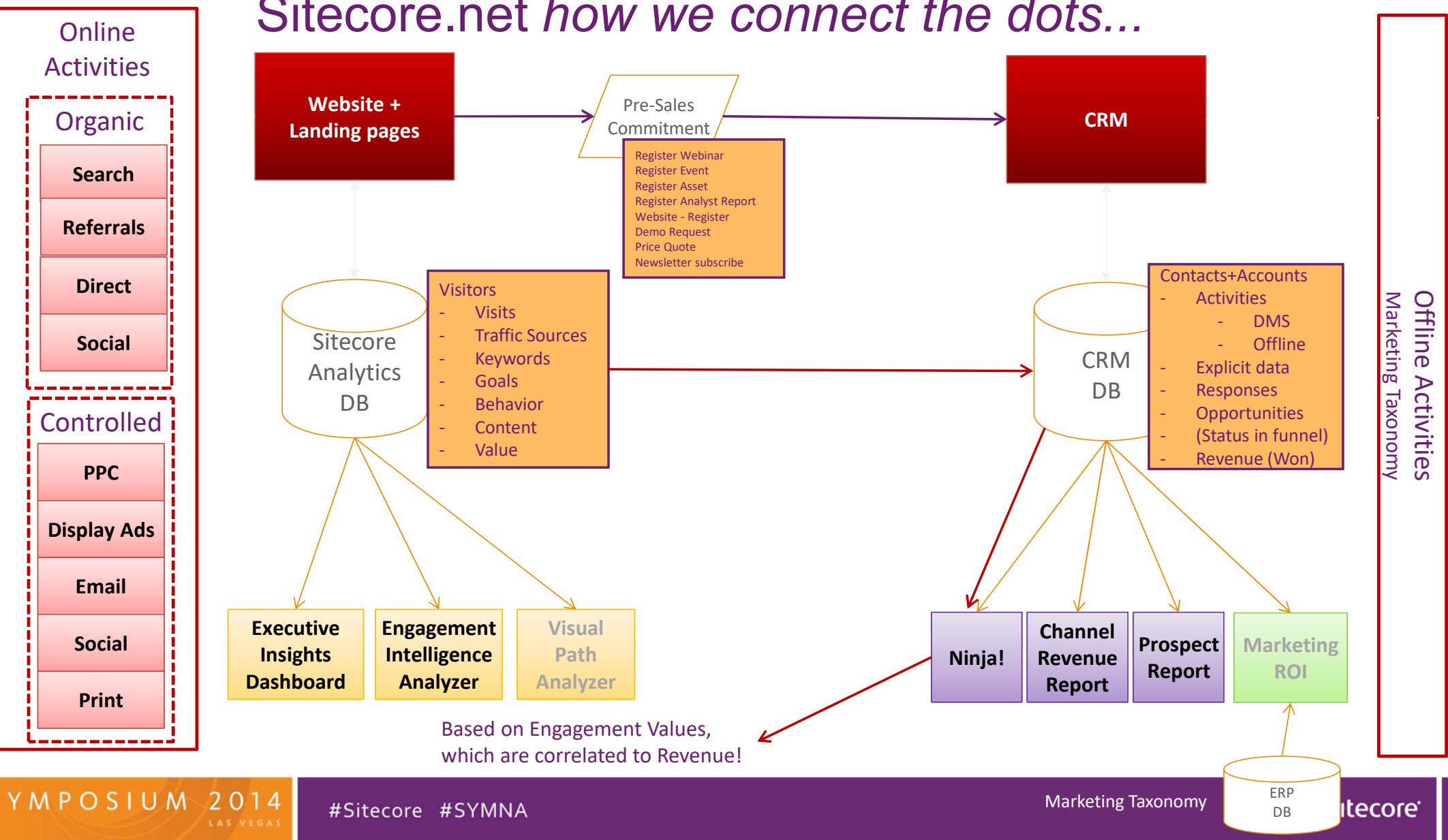


What is the first question you ask when looking at a muscle car?



What type of engine does the car have!

# Sitecore.net how we connect the dots...



# CRM Integration – Every Car Has A Motor

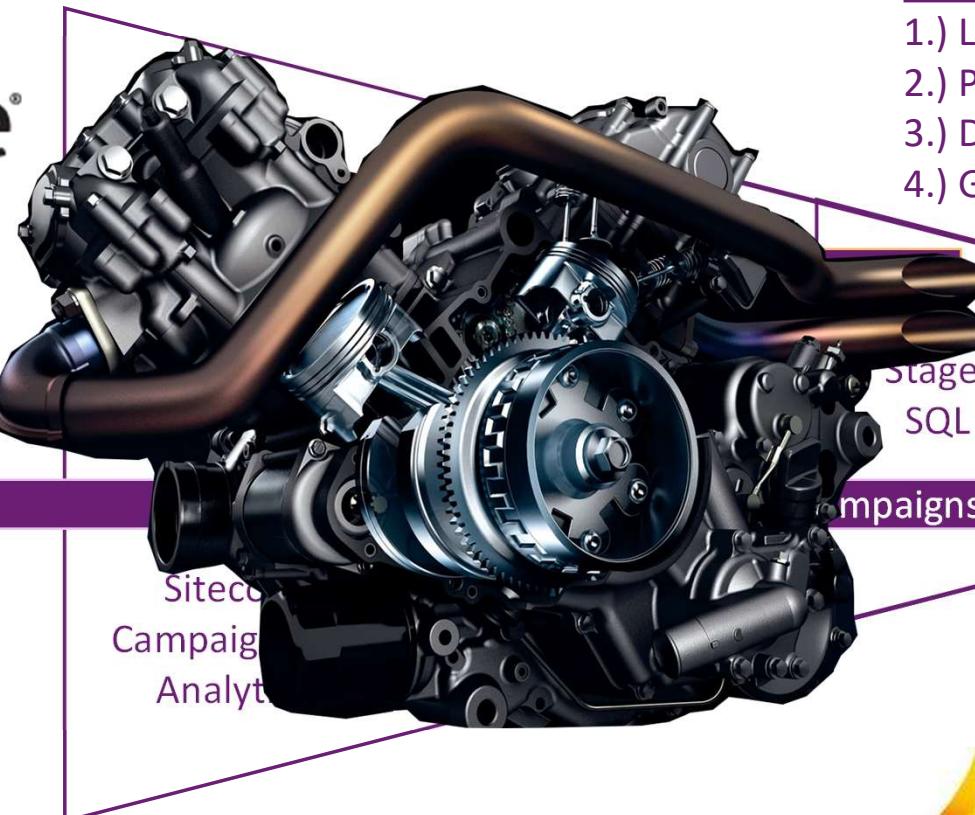
Marketing

LQT

Sales



- Marketing Campaigns
- Sessions and Visit Analytics
- Traffic Types
- Engagement
- Conversions
- Value



## Sitecore Powers:

- 1.) Lead Generation
- 2.) Predictive Scoring
- 3.) Data for Nurturing, Personalization, Sales
- 4.) Granular Analytics and KPIs

Stage:  
SQL

Campaigns Tied to Revenue

Opportunity



# What is a Campaign Response

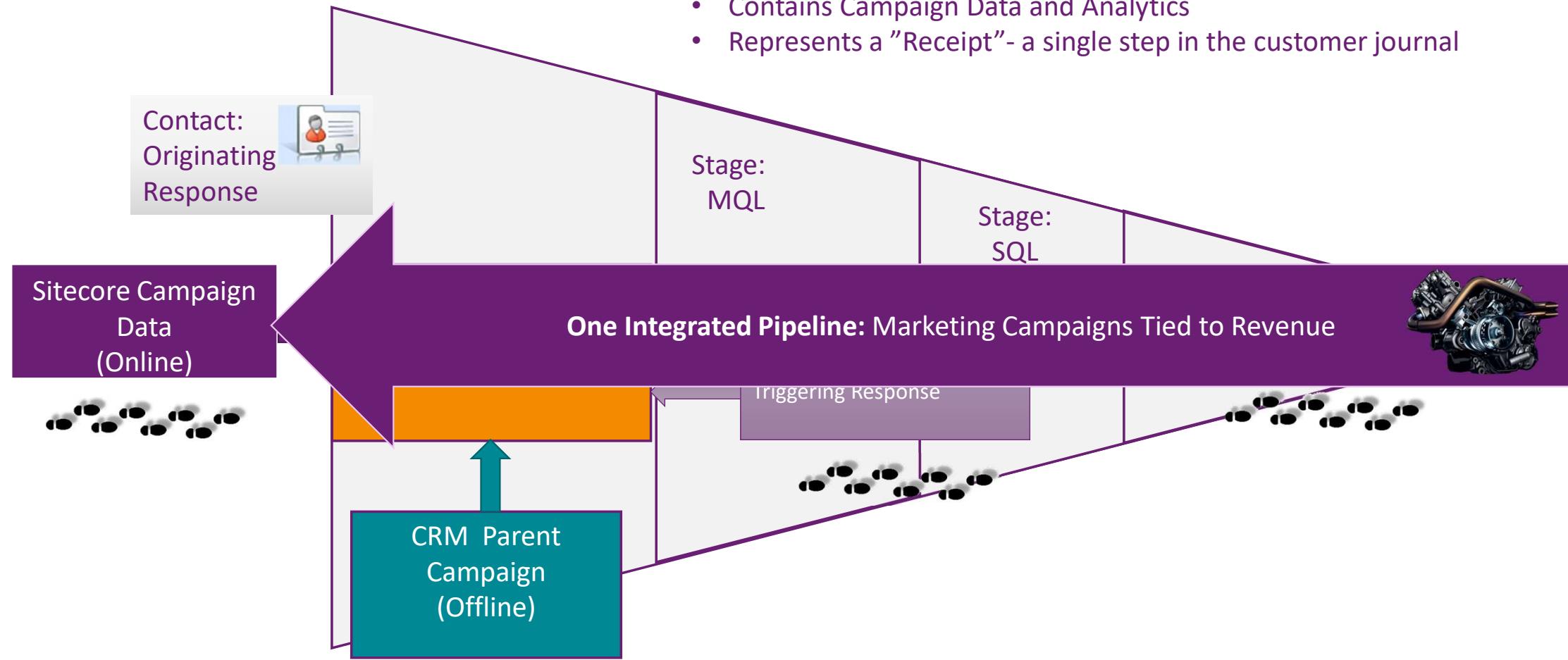
A Campaign Response is an activity type in Dynamics CRM that is related to a Campaign in CRM. When working with marketing in Dynamics CRM 2011, it is possible to create a Campaign and record a Campaign Response(response) to track outcomes from a particular Campaign.



A (Campaign)Response is a Receipt from a Marketing Outcome both Offline and Online

# CRM Integration – Simple Data Flow

- Campaign Response is created either from Form Submit or import
- Contains Campaign Data and Analytics
- Represents a "Receipt"- a single step in the customer journal



# Lead KPIs

Number of MQLs: Conversions  
# Of days in MQL Stage  
# Promoted to SQL  
# Disqualified and Reason

Marketing

Inside Sales

Field Sales

Number of Opportunities  
# Of days to Close  
Win/Loss Ratio

Opportunities

Deal Size  
Pipeline Velocity

SQL

Number of SQLs: Conversions  
# Of days in SQL Stage  
# Promoted to opportunity  
# Disqualified and Reason

# of Responses = 1  
MQL

# of MQL = 1 SQL

# SQL= 1 Opp

# How Does Sitecore Support the Data Map?

1. Marketing Taxonomy
2. Goals has Web Activities and System Aggregation
3. Goals as Predictive Scoring
4. Data Views in CRM

# The Marketing Taxonomy: Data Quality Lifter for Marketing Campaigns

## Online Marketing

41-00-00 Reserved Reserved Reserved

### PPC Advertising

41-10-01	Online	PPC Advertising	Bing search
41-10-02	Online	PPC Advertising	Google search

41-10-03

41-10-04

41-10-99

### Display Advertising

41-11-01	Online	Display Advertising	LinkedIn
41-11-02	Online	Display Advertising	Facebook
41-11-03	Online	Display Advertising	Google Display Network
41-11-99	Online	Display Advertising	Other Display

### Direct

41-20-01	Online	Direct	Company Website
41-20-02	Online	Direct	Direct Input of URL
41-20-03	Online	Direct	Referrals Misc.
41-20-04	Online	Direct	RSS
41-20-05	Online	Direct	Search Engine Branded

## Offline Marketing

42-00-00 Reserved Reserved Reserved

### Sales Activities

42-10-01	Offline	Sales	In bound phone call
42-10-02	Offline	Sales	Customer meeting
42-10-03	Offline	Sales	Cold Calling

42-11-01 Offline Telemarketing Tele Marketing

42-11-99 Offline Telemarketing Other

### Events

42-20-01	Offline	Event/Trade Show	Sitecore Symposium
42-20-02	Offline	Event/Trade Show	Sitecore Trendspot
42-20-03	Offline	Event/Trade Show	Trade shows
42-20-04	Offline	Event/Trade Show	Customer events / hospitality
42-20-05	Offline	Event/Trade Show	Industry event sponsorship
42-20-99	Offline	Event/Trade Show	Other

### Direct Marketing

42-30-01	Offline	Direct Marketing	Direct mail - Print, Collateral
42-30-99	Offline	Direct Marketing	Direct Marketing Other

# The Marketing Taxonomy: Data Quality Lifter for Marketing Campaigns

Contact  
**Patrick Kitchell**

E-mail  
patrick@kitchell.dk

Parent Account  
[service account](#)

**General**

Salutation  
mr

First Name \*  
Patrick

**Internal Information**

Owner \*  
[Jesper Lykkegaard](#)

Originating Response  
[MCEV DK Dig](#)

Last Date Included in Campaign

Registration Source  
Personal Portal

**Sitecore**

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Qualification Record  
**QR: 2013-Apr-16 Online 41 Auto Create**

State	Disqualified	Status	Error - Internal Accide
Team	<a href="#">NL Sales</a>	User	

Topic

Contact \* [Patrick Kitchell](#)

Parent Account [service account](#)

Total Number of QRs 5

Related to the Account

Time from Last activity 358d 20:14

Response trigger [MCOT XI Best CMS FR](#)

Opportunity

Referring Partner

Number of Open Opportunities

# Goals has Web Activities and System Data Aggregation

Contact  
**Patrick Kitchell**

E-mail  
patrick@kitchell.dk

Parent Account  
[service account](#)

Filter on: All

	Date Created	Actual End	Subject
<input type="checkbox"/>	22-10-2013 15:44	22-10-2013...	website visited
<input type="checkbox"/>	17-10-2013 18:48	17-10-2013...	website visited
<input type="checkbox"/>	08-10-2013 08:21	08-10-2013...	website visited
<input type="checkbox"/>	01-10-2013 13:27	01-10-2013...	website visited
<input type="checkbox"/>	30-09-2013 15:38	30-09-2013...	website visited
<input type="checkbox"/>	30-09-2013 15:38	30-09-2013...	website visited
<input type="checkbox"/>	27-09-2013 21:26	27-09-2013...	website visited
<input type="checkbox"/>	26-09-2013 15:16	26-09-2013...	website visited
<input type="checkbox"/>	25-09-2013 15:57	25-09-2013...	NNNN XC Click Er
<input type="checkbox"/>	25-09-2013 15:43	25-09-2013...	NNNN XC Click Er
<input type="checkbox"/>	21-09-2013 10:20	21-09-2013...	website visited
<input type="checkbox"/>	10-09-2013 16:20	10-09-2013...	SIOP XC Hero Rev
<input type="checkbox"/>	10-09-2013 10:53	10-09-2013...	MCWB NO Live W
<input type="checkbox"/>	10-09-2013 10:53	10-09-2013...	MCWB NO Live W
<input type="checkbox"/>	10-09-2013 10:53	10-09-2013...	MCWB NO Live W
<input type="checkbox"/>	10-09-2013 10:53	10-09-2013...	MCWB NO Live W
<input type="checkbox"/>	10-09-2013 10:51	10-09-2013...	MCWB NO Live W
<input type="checkbox"/>	10-09-2013 10:49	10-09-2013...	MCWB NO Live W
<input type="checkbox"/>	10-09-2013 10:46	10-09-2013...	MCWB NO Live Webinar 11 September Form Completed
<input type="checkbox"/>	10-09-2013 10:46	10-09-2013...	website visited
<input type="checkbox"/>	05-09-2013 21:38	05-09-2013...	website visited
<input type="checkbox"/>	05-09-2013 10:45	05-09-2013...	website visited

## Website Activity

### NNNN XC Click Email Link

**General**

Activity Type: [NNNN XC Click Email Link](#)

DMS Campaign: [042.20.05/XI/XI13MSEPS/PE/NNNNN/INT Post EPS event inv 1](#)

Date Created: 25-09-2013

Actual End: 25-09-2013

Regarding: [Patrick Kitchell](#)

URL or Description: /site

Subject: \*

Parent Visit

Traffic Type: Direct

**General**

Campaign Name: \* 042.20.05/XI/XI13MSEPS/PE/NNNNN/INT Post EPS event inv 1

Region: XI

Channel: 042 20 Event Trade Show

Sub channel: 042 20 05 Industry Event Sponsorship

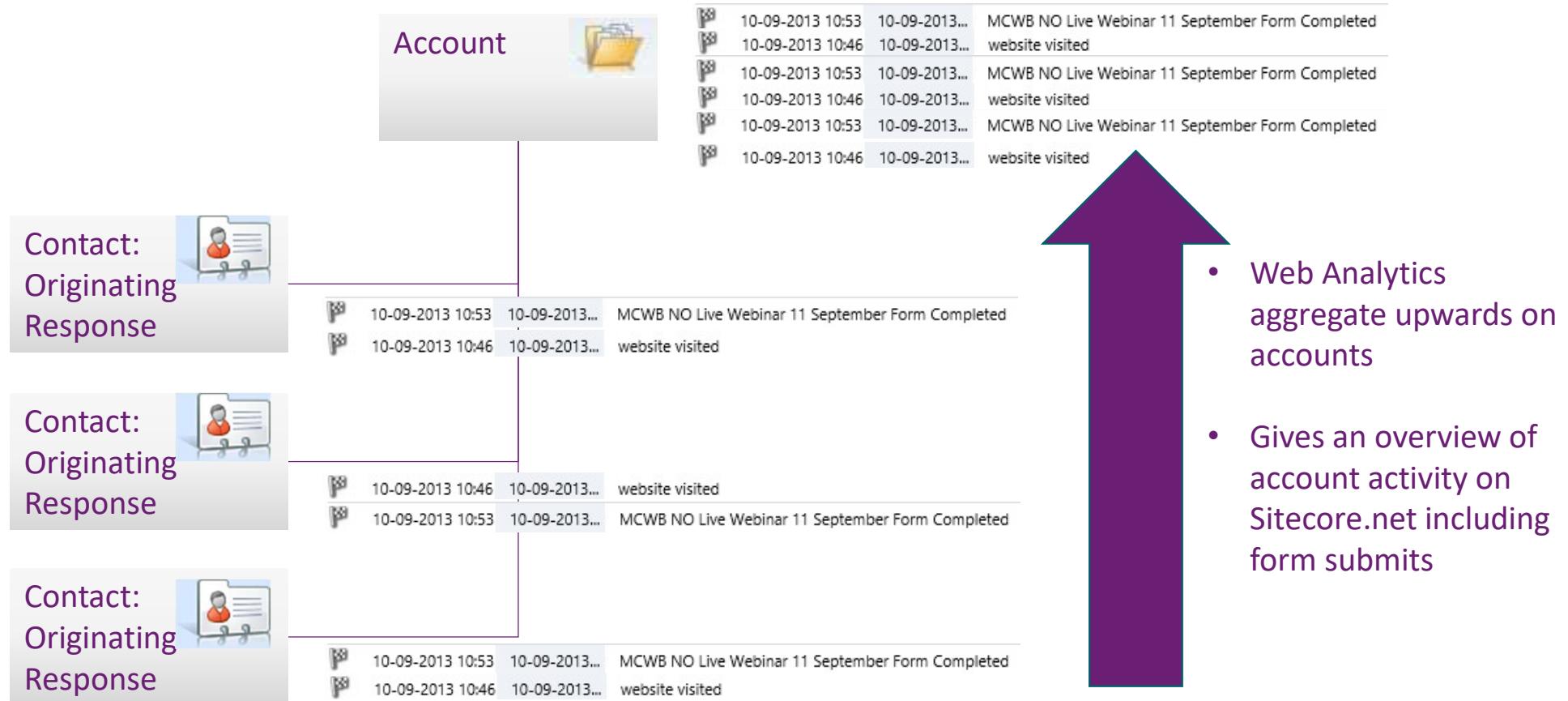
1 - 250 of 573 (0 selected)

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Page 1

 sitecore®

# Goals has Web Activities and System Data Aggregation



# What is Predictive(Ninja) Scoring?

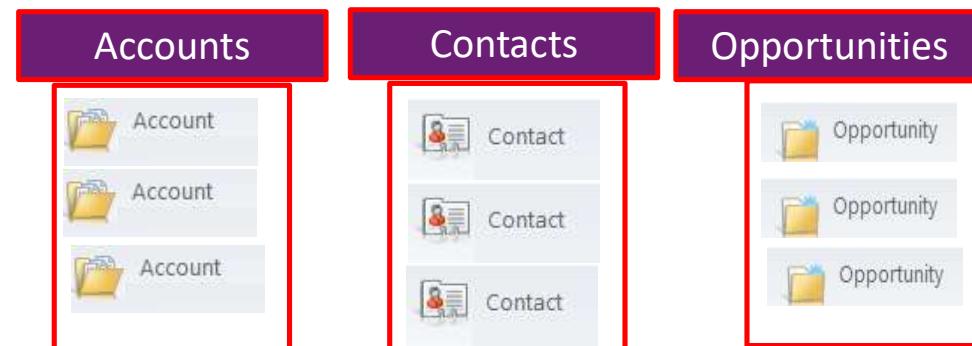
Predictive scoring is a method in which tries to draw an understanding between the behavior that has led something to occur and probability that it will occur again.

Ninja Scoring is a predictive scoring system because it tries to measure the web behavior on a website from various channels and the relationship this behavior has in driving revenue in a company.

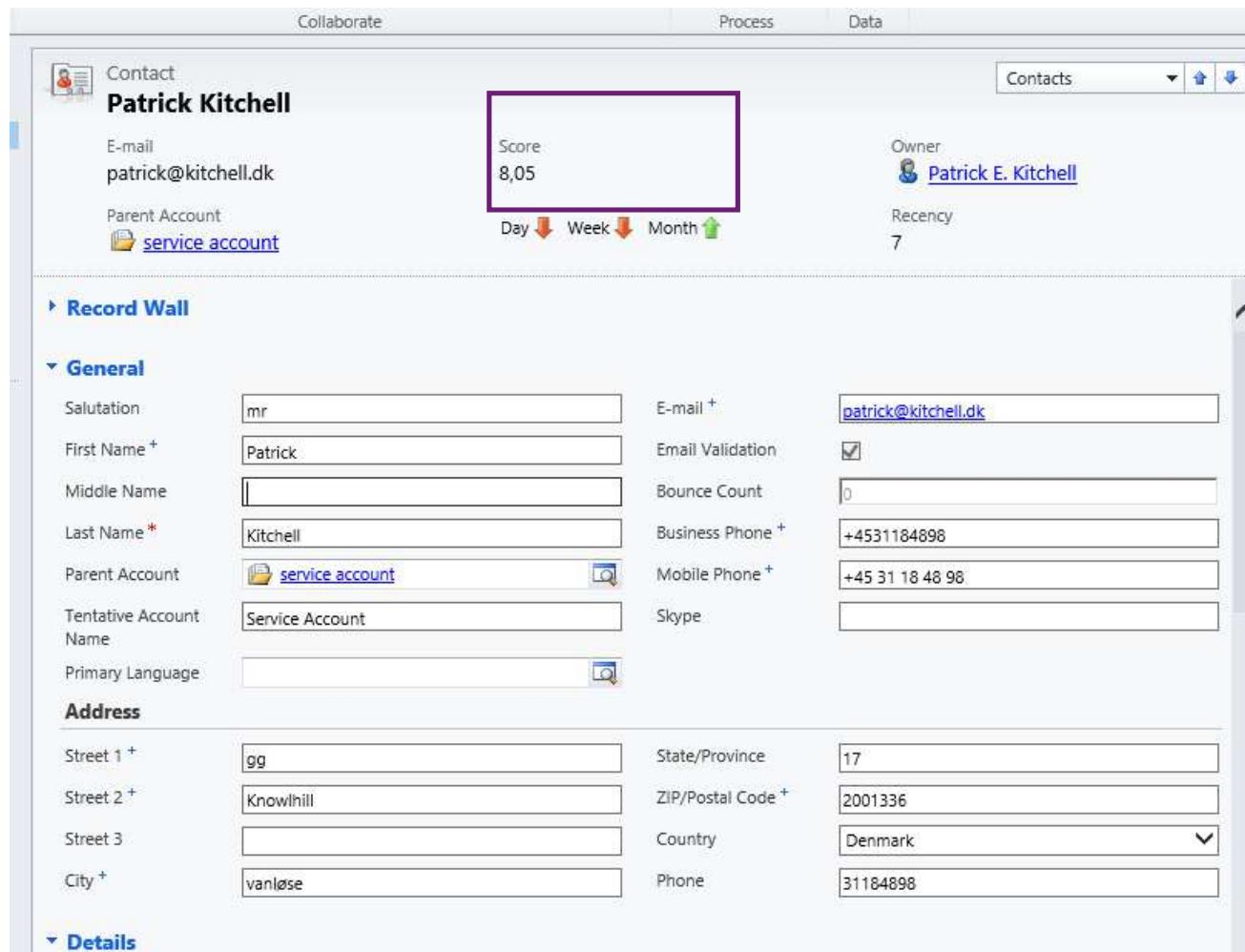
# NINJA Scoring



Score per activity is predicting behavior that has led to success in the past and predicts it forward to the present. Ranking Contacts, Accounts and Opportunities in Dynamics CRM.



# CRM and Predictive(Ninja) Scoring



The screenshot shows the Sitecore CRM interface for a contact named Patrick Kitchell. At the top, there's a navigation bar with 'Collaborate', 'Process', and 'Data' tabs, and a dropdown for 'Contacts'. Below the header, the contact's name is displayed along with their email (patrick@kitchell.dk) and a parent account ('service account'). A large red box highlights the 'Score' field, which shows a value of 8,05. Below the score, there are buttons for 'Day', 'Week', and 'Month'. To the right, the contact's owner is listed as 'Patrick E. Kitchell' and their recency is shown as 7. The main area contains sections for 'Record Wall' and 'General' information. The 'General' section includes fields for Salutation (mr), First Name (Patrick), Middle Name, Last Name (Kitchell), Parent Account ('service account'), Tentative Account Name (Service Account), Primary Language, Email Validation (checked), Bounce Count (0), Business Phone (+4531184898), Mobile Phone (+45 31 18 48 98), and Skype. The 'Address' section includes fields for Street 1 (gg), Street 2 (Knowlhill), Street 3, City (vanløse), State/Province (17), ZIP/Postal Code (2001336), Country (Denmark), and Phone (31184898). At the bottom, there's a 'Details' section.

1. Gives Indication of Interest
2. Helps sales rank contacts, accounts
3. Helps sales to know which opportunities could land first.
4. Shows which marketing campaigns produce the most value.

Contact  
**Patrick Kitchell**

E-mail  
patrick@kitchell.dk

Parent Account  
[Service Account](#)

**Score**  
38.33

**General**

Salutation	mr	E-mail +
First Name +	Patrick	Email Validation
Middle Name		Bounce Count
Last Name *	Kitchell	Business Phone +
Parent Account	<a href="#">Service Account</a>	Mobile Phone +
Tentative Account Name	None	Skype

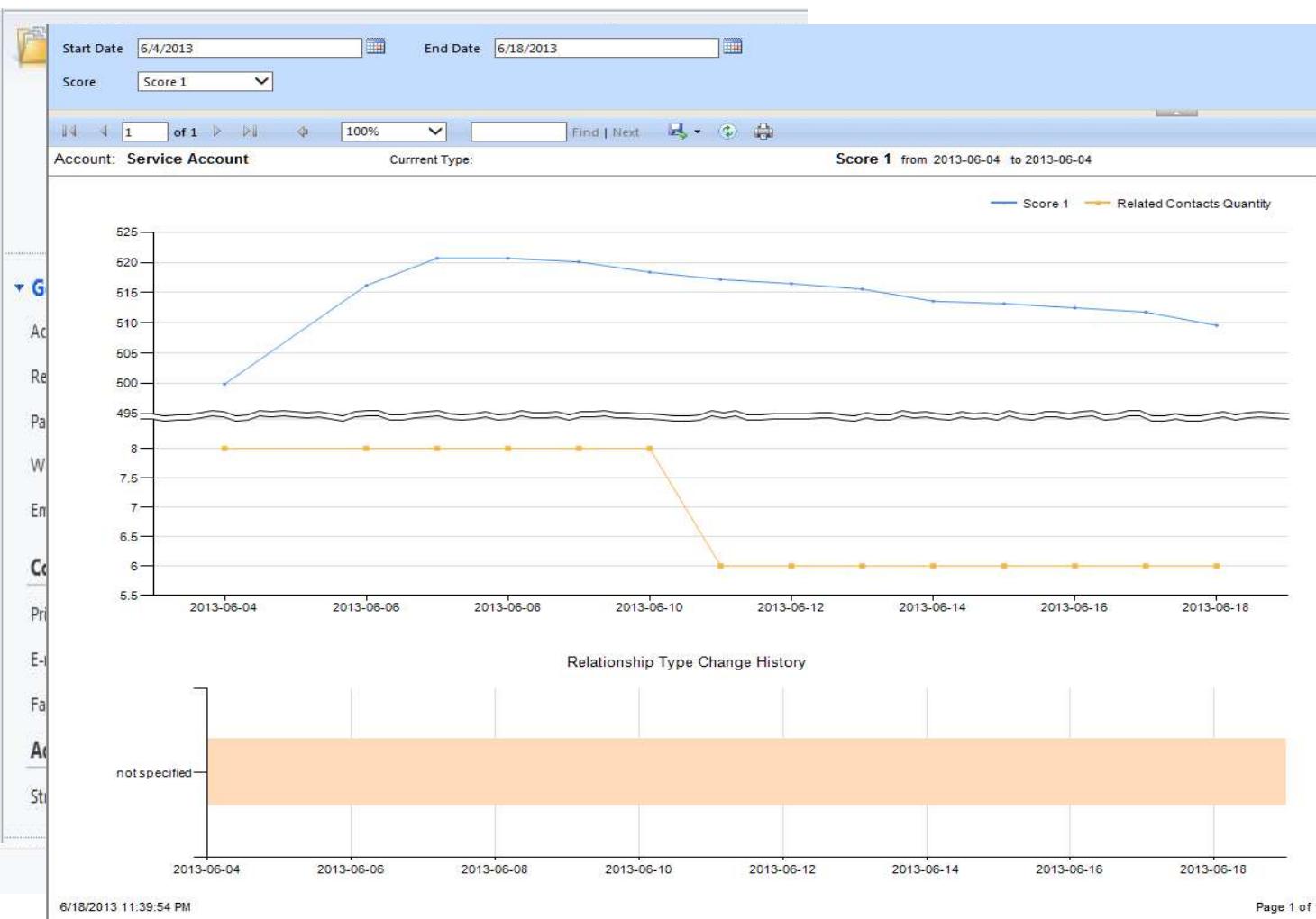
**Address**

Street 1 +		State/Province
Street 2 +		ZIP/Postal Code +
Street 3		Country
City +		Phone

**Details**

**Professional Information**

Department		Contact Type
Role		Job Title
Personas	Jerry	



# System Views and Data Aggregation

	Country	Created On	Originating Marketing...	Email Validation	Recency	Score Day Trend	Score Month Tre...	Score Week Trend	Score5 ▾
<input checked="" type="checkbox"/>	Denmark	19-05-2014 10:23	Online 41 No Auto Crea	Yes	2	-0,5	12,2	6,7	132,58
<input type="checkbox"/>	United States	30-06-2014 18:31	Online 41 Auto Create	Yes	1	2,4	-1,9	-1,8	91,82
<input type="checkbox"/>	Australia	12-03-2014 05:55	Online 41 Auto Create	Yes	2	0,2	35,9	1,0	38,19
<input type="checkbox"/>	Sweden	20-02-2014 11:25	Online 41 Auto Create	Yes	1	4,7	12,8	-1,1	33,24
<input type="checkbox"/>	United States	04-08-2014 01:23	Online 41 No Auto Crea	Yes	3	0,2	25,7	0,6	30,46
<input type="checkbox"/>	New Zealand	10-07-2014 00:44		Yes	5	-0,1	1,4	9,9	26,65
<input type="checkbox"/>	New Zealand	13-03-2014 00:46	Online 41 Auto Create	Yes	6	-0,3	5,5	-0,8	25,84
<input type="checkbox"/>	United States	17-09-2013 19:45		Yes	6	-2,0	13,1	-0,4	22,82
<input type="checkbox"/>	Australia	25-10-2013 06:06	Online 41 Auto Create	Yes	2	0,2	-4,6	2,6	22,39
<input type="checkbox"/>	United States	31-07-2013 04:51	Online 41 Auto Create	Yes	4	-0,3	1,9	22,2	22,20
<input type="checkbox"/>	United States	07-03-2014 07:00	Contacts with No Parent Account, No Sitecore Employees					-0,5	21,62
<input type="checkbox"/>	Australia	31-01-2014 07:00			-	-,-	-,-	1,3	20,63
<input type="checkbox"/>	Belgium	19-06-2014 08:12	Online 41 Auto Create	Yes	0	3,5	6,8	-0,1	20,24
<input type="checkbox"/>	Canada	15-07-2014 20:22	Online 41 Auto Create	Yes	2	0,2	4,2	0,1	20,06
<input type="checkbox"/>	Spain	29-08-2014 12:18	Online 41 Auto Create	Yes	1	0,2	11,6	6,8	19,77
<input type="checkbox"/>	United States	09-07-2014 19:14	Online 41 No Auto Crea	Yes	6	-1,2	8,2	0,3	19,14
<input type="checkbox"/>	Denmark	16-06-2014 13:26	Online 41 Auto Create	Yes	1	2,7	15,6	-0,5	18,88
<input type="checkbox"/>	United States	29-05-2014 23:07	Online 41 No Auto Crea	Yes	1	9,3	2,0	1,5	18,35
<input type="checkbox"/>	United States	11-08-2014 08:18	Online 41 No Auto Crea	Yes	1	-3,2	1,6	3,0	16,58
<input type="checkbox"/>	Sweden	20-02-2014 11:27	Online 41 Auto Create	Yes	6	-0,1	4,5	-0,4	15,91
<input type="checkbox"/>	Netherlands	03-07-2014 09:29	Online 41 No Auto Crea	Yes	1	8,4	-3,7	1,2	13,80
<input type="checkbox"/>	Netherlands	01-05-2014 08:16	Online 41 Auto Create	Yes					
<input type="checkbox"/>	Australia	23-09-2013 05:42	42.20.99/AU/AU13DGW	Yes					
<input type="checkbox"/>	Denmark	10-07-2014 10:48	Online 41 Auto Create						
<input type="checkbox"/>	Denmark	03-10-2013 16:05	Online 41 Auto Create						
<input type="checkbox"/>	Norway	25-04-2014 18:52	Online 41 Auto Create						
<input type="checkbox"/>	United States	06-03-2014 23:21	Online 41 No Auto Crea						

	Account Score ▾	Est. Close Date	Est. Revenue	. Proba...	Business Unit (
<input type="checkbox"/>	231,24	30-12-2013	E 50.000,00	50	Sitecore AU
<input type="checkbox"/>	148,44	30-03-2015	kr 100.000,00	20	Sitecore USA
<input type="checkbox"/>	108,89	31-03-2015	kr 146.775,00	45	Sitecore Canada
<input type="checkbox"/>	107,74	25-02-2015	kr 669.600,00	20	Sitecore NL
<input type="checkbox"/>	107,74	29-01-2015	\$ 80.000,00	20	Sitecore Norway
<input type="checkbox"/>	107,74	30-11-2014	€ 157.000,00	20	Sitecore Denmark
<input type="checkbox"/>	107,74				Danmark

Opportunities By Score

## Conclusion: Our Points of Learnings

- Develop a Long Term Data Stratgy and Vision Remember Good Things Take Time
- A Global Inititive Focus on Data Integrity
- A Combined Integrated Pipeline with Mandatory Pressure Points For Global KPIs
- Leverage the DMS Analytics both in Sitecore and in CRM
- Make Data Visible and User Friendly



## Sitecores Powers the Conversation

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#Sitecore #SYMNA

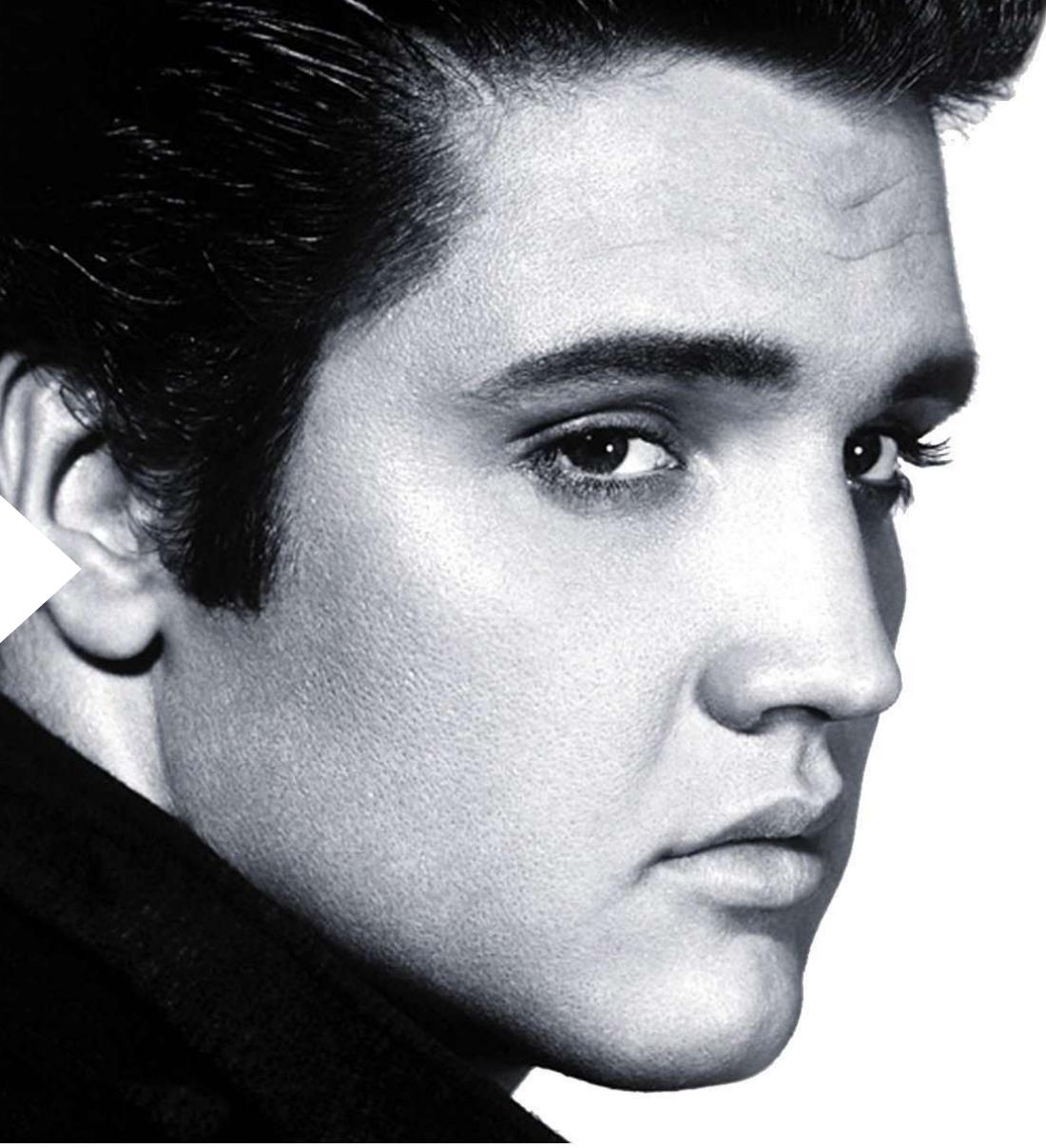
 sitecore®

# Sitecore.net

## Component Based Architecture



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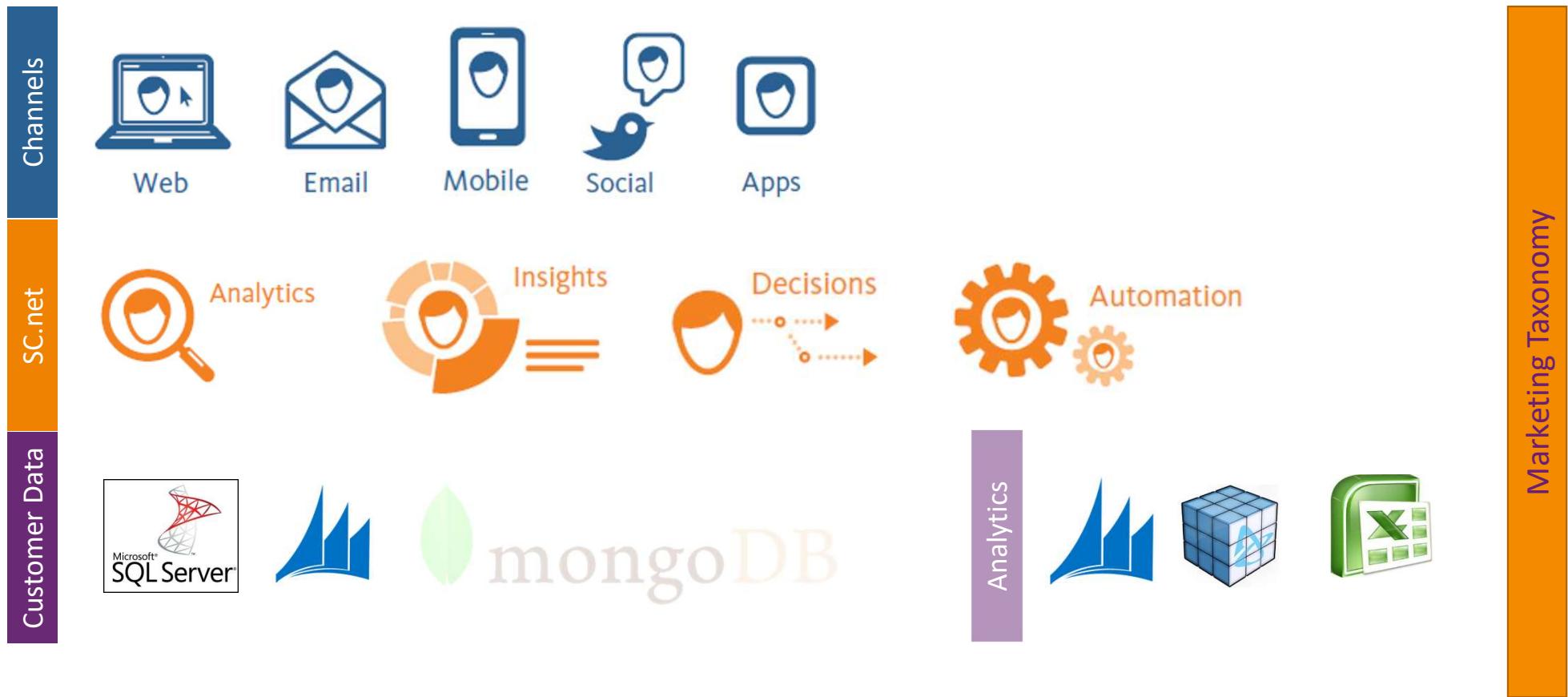
# Fuel

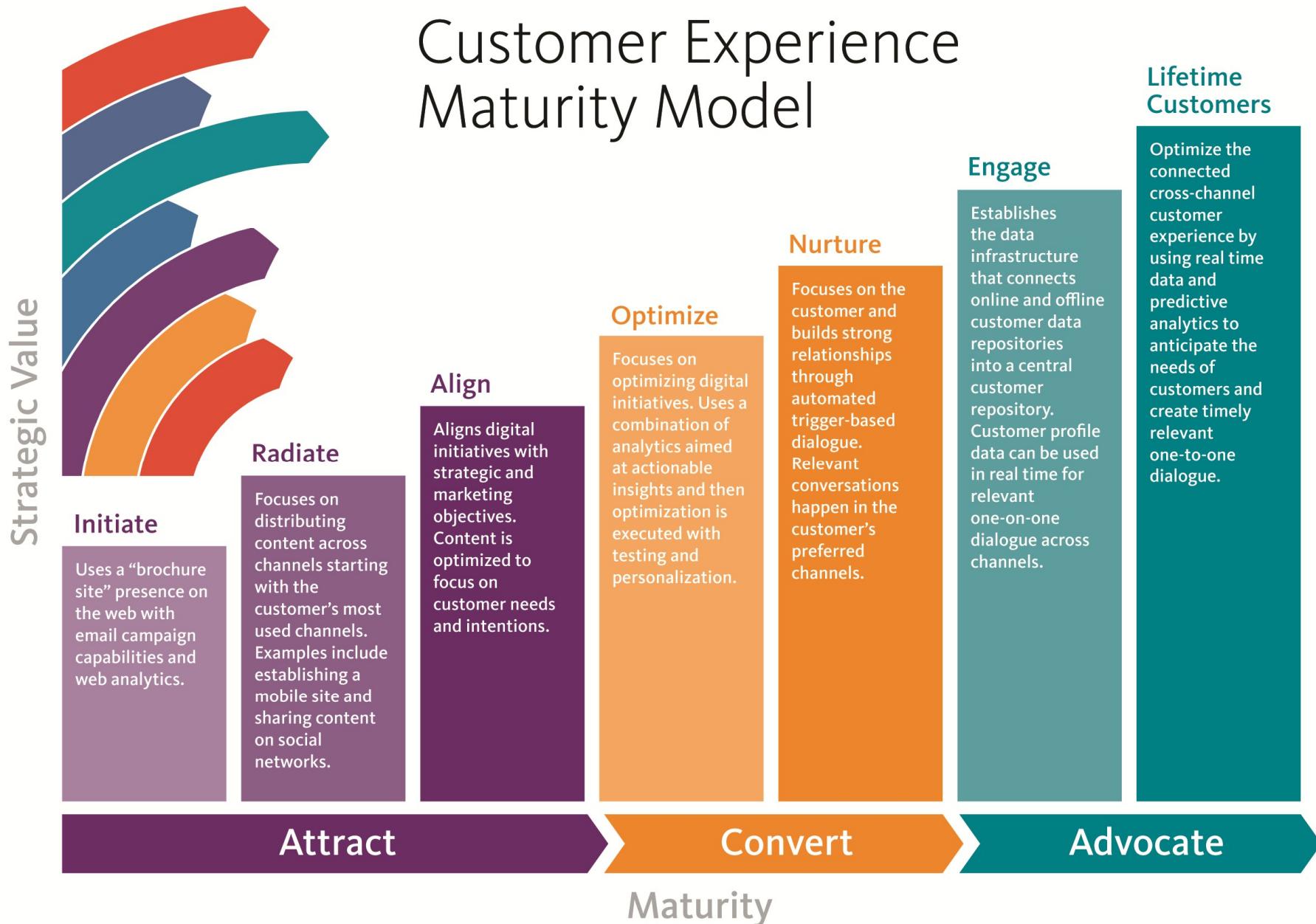
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Sales through Sitecore Marketing

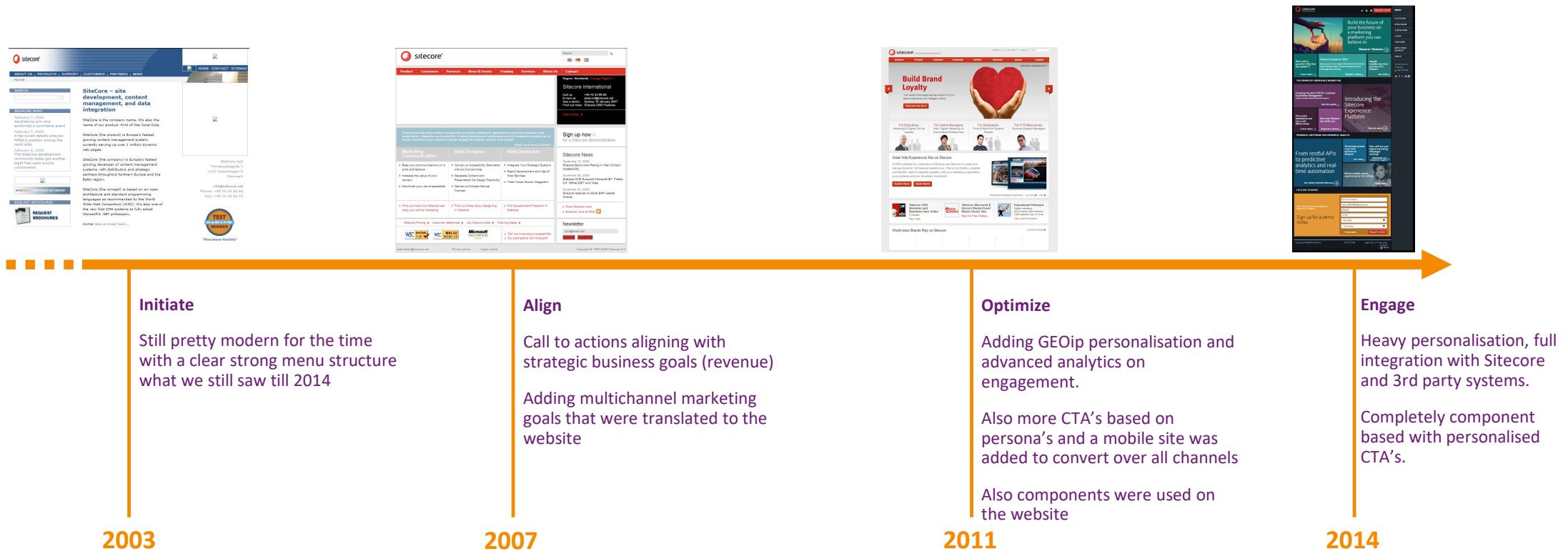
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# Sitecore.net Marketing

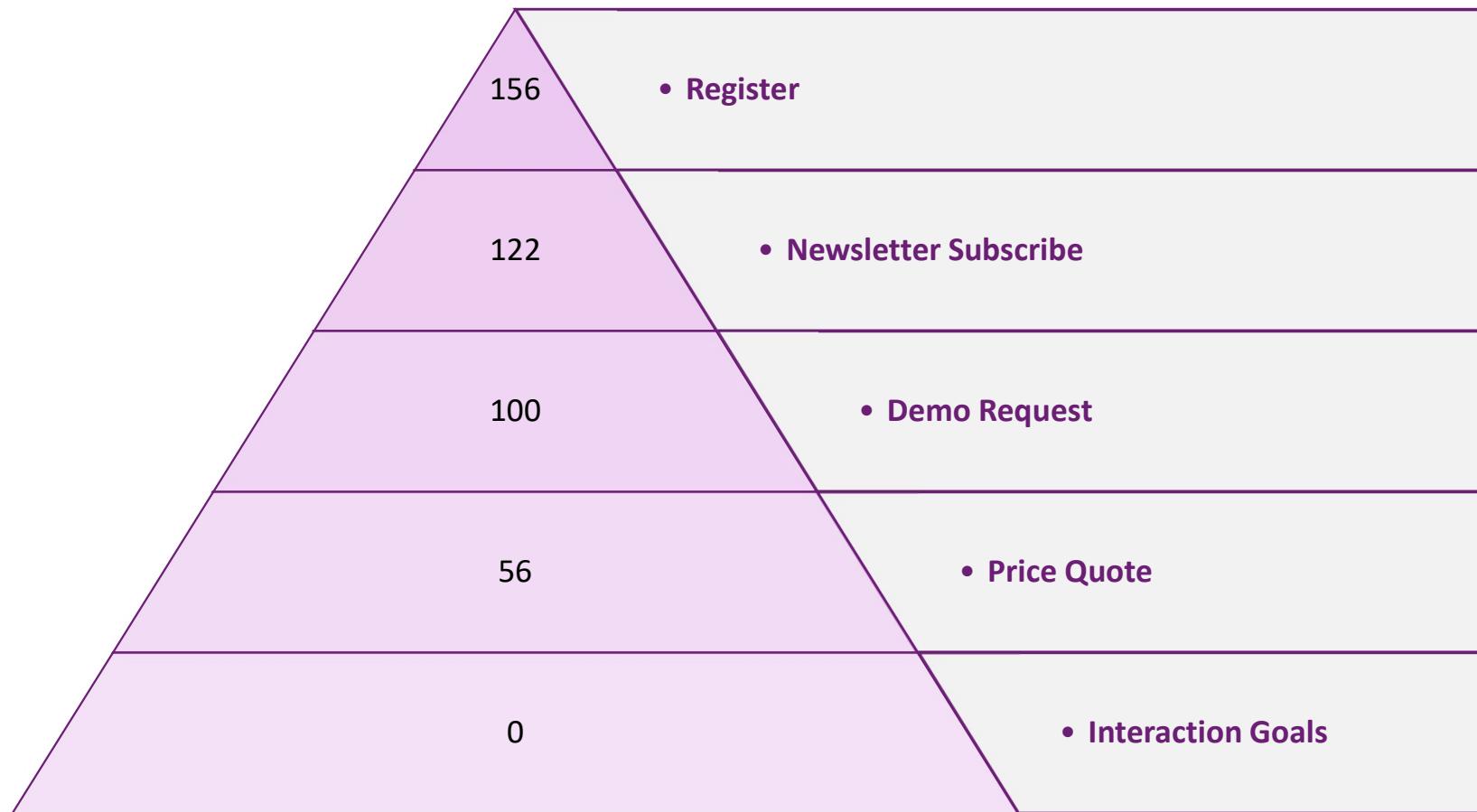




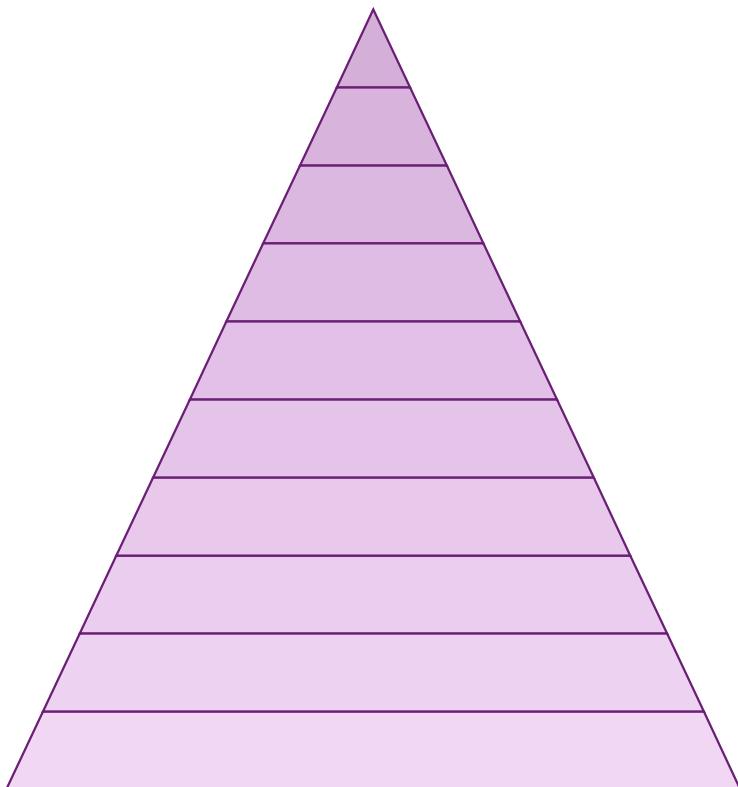
# Sitecore.net Evolution



# Engagement Value scoring system @Sitecore - 2012

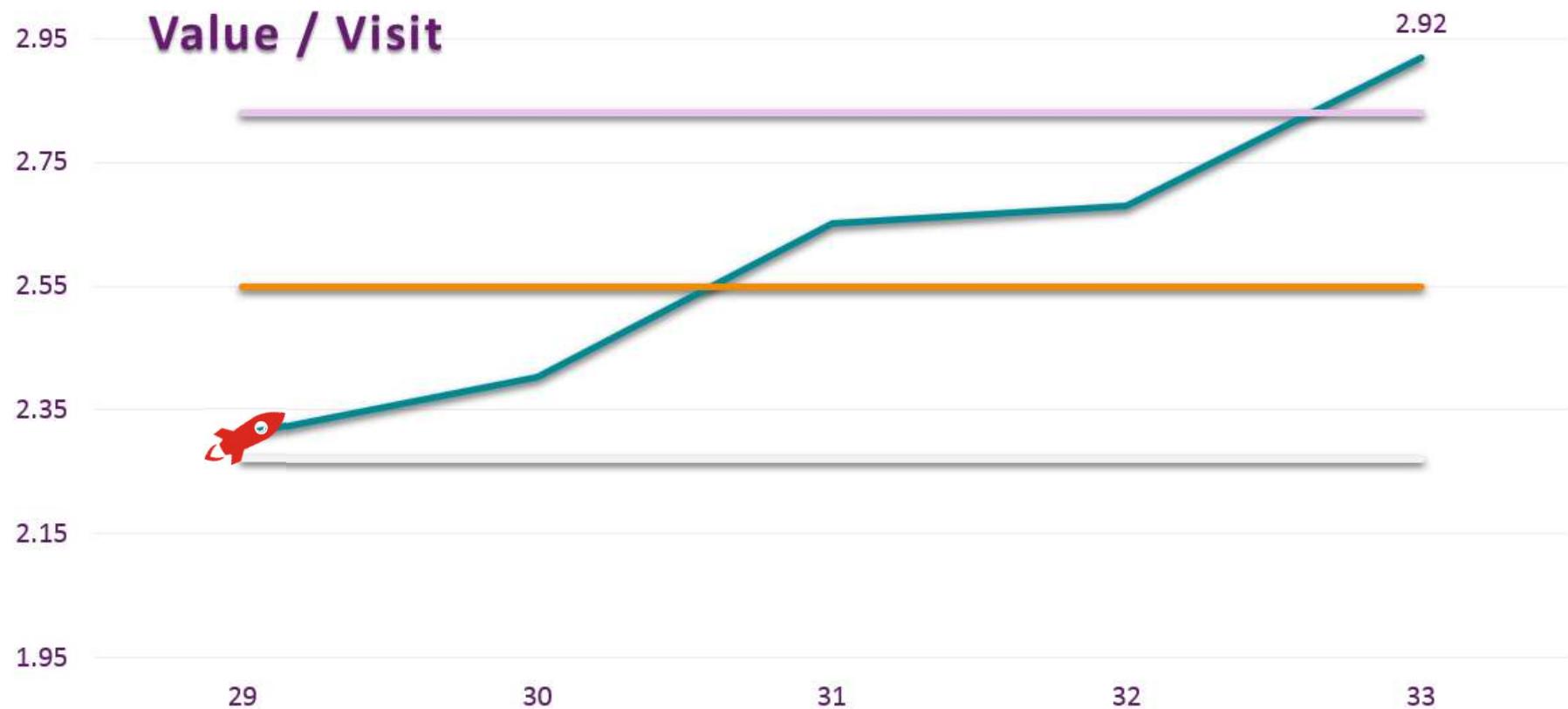


# Engagement Value scoring system @Sitecore - 2014



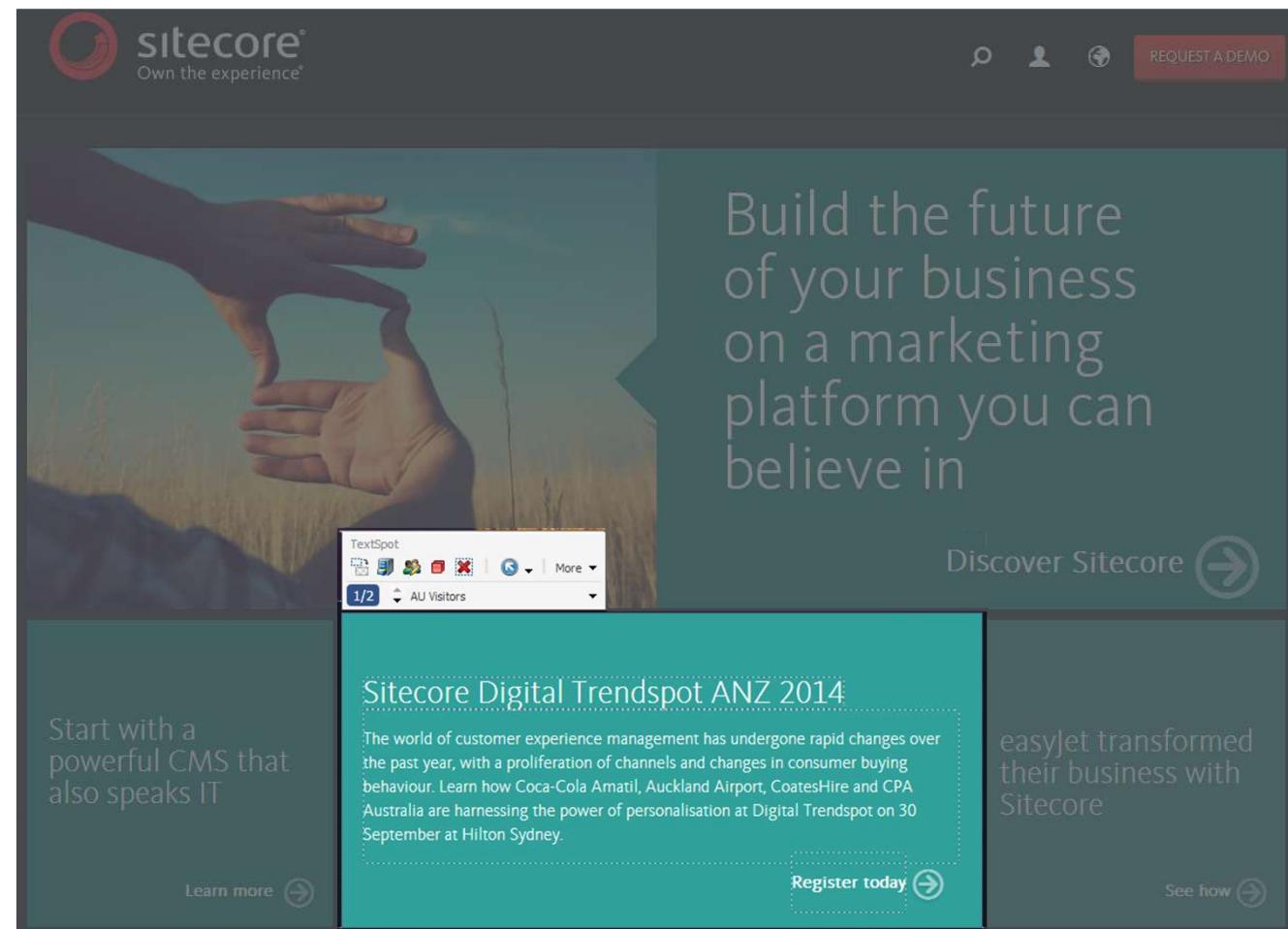
158	WERG	Website Register
106	MCAR	Marketing Campaign – Register Analyst Report
100	DEQU	Demo Request
94	NWSU	Newsletter Subscribe
85	MCWB	Marketing Campaign – Register Webinar
64	MCOT	Marketing Campaign – Register Asset Other
59	PRQU	Price Quote
54	MCEV	Marketing Campaign – Register Event
23	MCEB	Marketing Campaign – Register Asset eBook
-94	NWUS	Newsletter Unsubscribe

# Initial results of the new website



# Component Design & Personalization

[HeroSpot] component – big on brand image, short title and click more button.

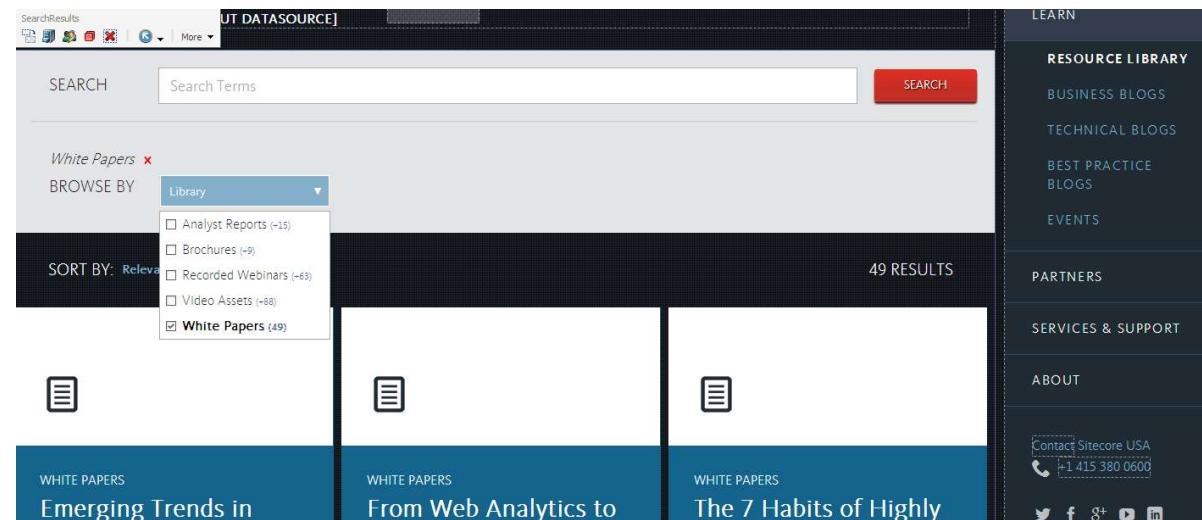


[TextSpot] component – personalized on region (geoip) with Symposium CTA

# Component Design & Personalization

[SearchResults] component – improved search functionality.  
Added dropdown for search selections.

Personalization possible on the images of the assets.



## Register now

for unlimited access to all of our learning resources.

Already have an account? [Log in now](#)

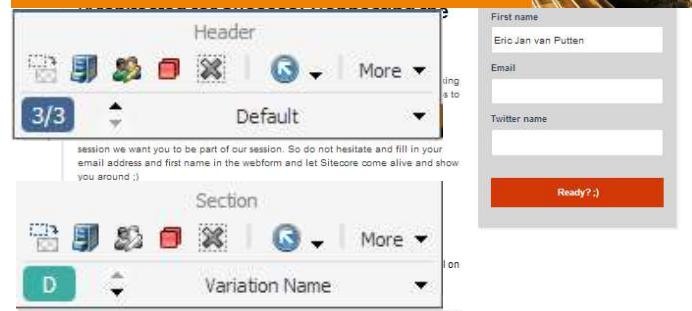
This screenshot shows a registration form within a Sitecore component. It includes fields for first name ("Eric Jan van Putten"), last name ("testejvp23424ss234@sitecore.net"), phone number ("3234242"), address ("no idea"), role ("Select Role" dropdown), and country ("Netherlands" dropdown). There are also "Remember Me" and "REGISTER NOW" buttons at the bottom.

[RegisterForm] component – Personalized on component  
(when logged in it shows download [FullWidthCTA]  
component)

Improved vs last version is the 'Role' dropdown.

# Component Design & Personalization

[header] component –  
Personalization often activated for  
multi-message/multi-channel  
campaigns



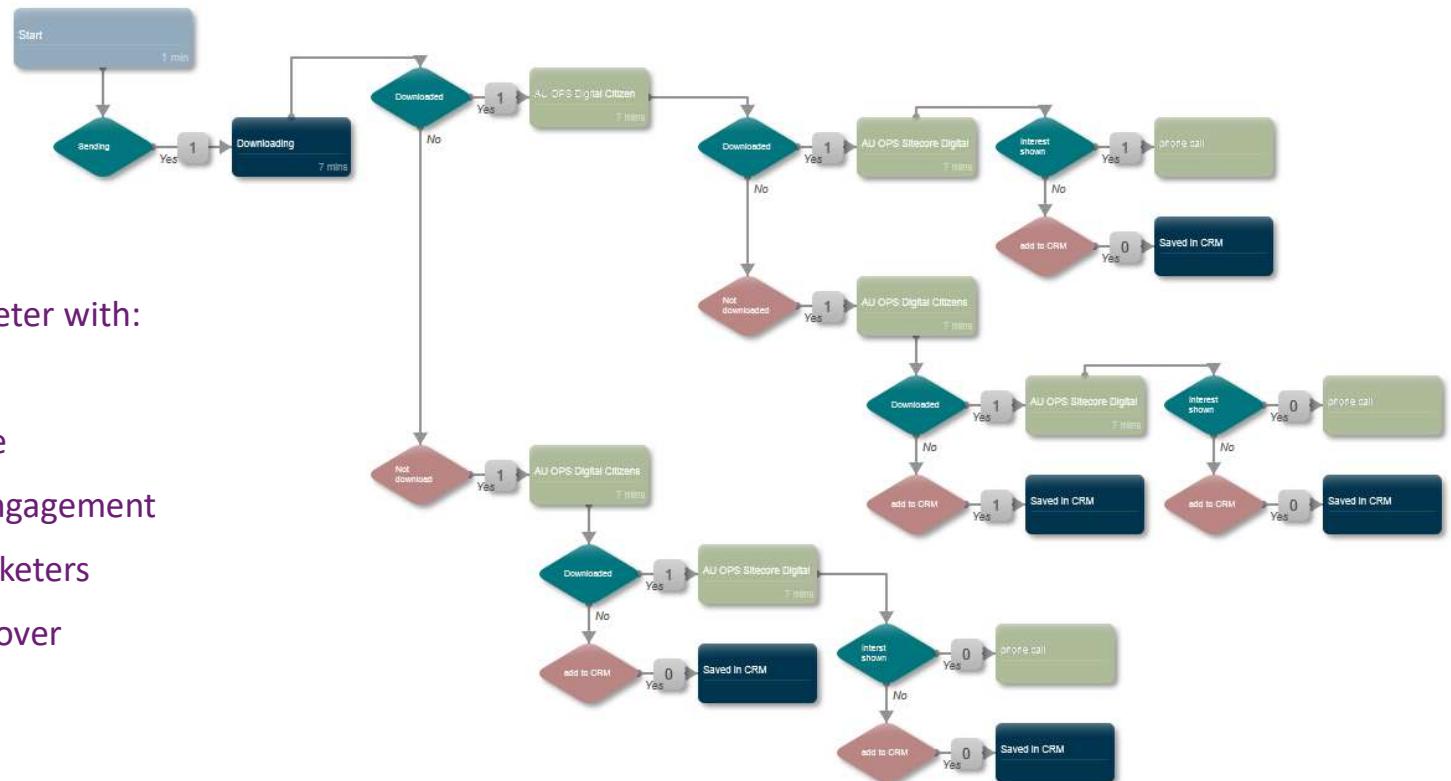
[Bullet Points] component –  
Personalized points depending on  
channels (but of course  
everything is possible).

## So we are curious what brought you to vegas:

- ❖ **Viva Las Vegas** - Bright light city gonna set my soul. Gonna set my soul on fire!
- ❖ **1 Las Vegas casino tip** - Lose your money in style
- ❖ **Another Las Vegas casino tip** - Act like a high roller (without rolling high)
- ❖ **Golden Gate Hotel** - The first hotel and casino to open in Las Vegas in 1906



# Engagement Plans (marketing automation)



Great to help out the day to day marketer with:

- Automation of ECM items
- Complete access to the rule engine
- Triggered responses to optimize engagement
- HUGE timesaver for (regional) marketers
- Optimized marketing & sales handover



Fuel

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Sales through Sitecore Marketing

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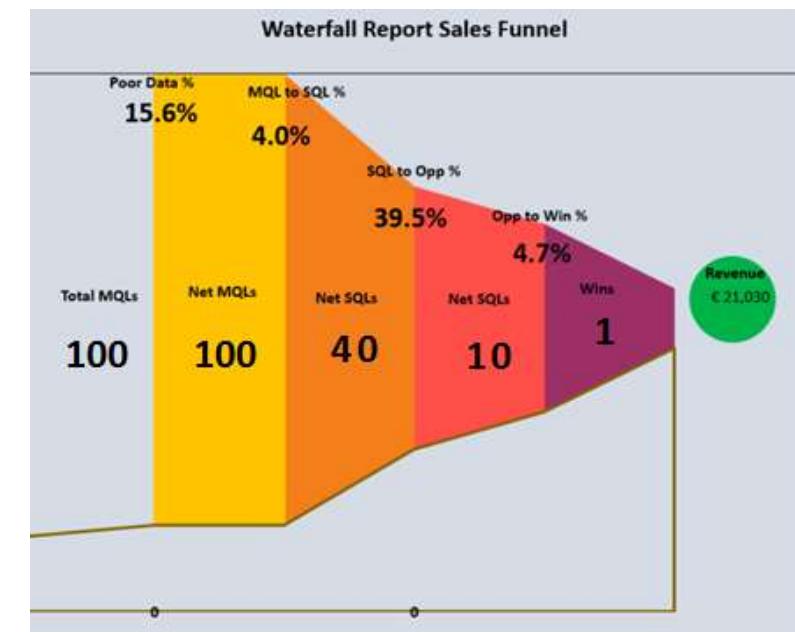
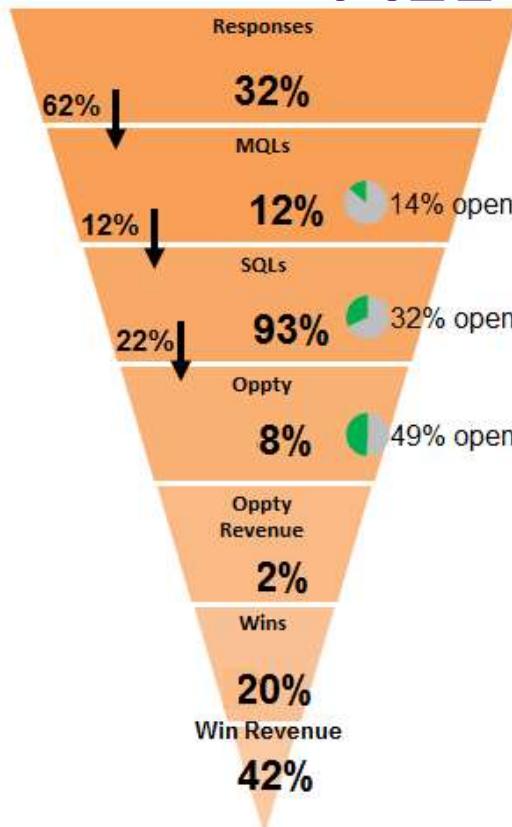
# Sitecore.net

Single View of the Customer

# Single View of Customers

This screenshot shows the Microsoft Dynamics CRM interface for a contact named Patrick Kitchell. The top navigation bar includes 'File', 'Contact', 'Add', 'Activities', 'List Tools', 'All Microsoft Dynamics CRM', 'Ian Lowe Sitecore', and a search bar. Below the header are tabs for 'Information', 'Related', 'Service', 'Marketing', and 'Processes'. The main content area displays contact details: Name (Patrick Kitchell), E-mail (patrick@kitchell.dk), Score (7.72), Owner (Patrick E. Kitchell), and Recency (9). A 'Recent' section shows activity items like 'Record Wall', 'General Details', 'Preferences', 'Notes & Activities', 'Security', 'Online Activity', and 'Add New Activity'. A large list of related records is shown under 'Related'.

# ALL Numbers Are Fake



# Single View of Customers

Online/Offline	Channel	Direct Spend on Channel	Responses		Revenue Attribution		ROI	
			Count	Cost per	Channel Total	Per Response	Channel Total	Per Response
Online	41-10 PPC Advertising	€		€	€	€	%	%
	41-11 Display Advertising	€		€	€	€	%	%
	41-20 Direct	€		€	€	€	%	%
	41-21 Organic Search	€		€	€	€	%	%
	41-30 Email Marketing	€		€	€	€	%	%
	41-40 3rd Party	€		€	€	€	%	%
	41-50 Social Media Mentions	€		€	€	€	%	%
	41-51 Social Media Community	€		€	€	€	%	%
	41-60 Digital Events	€		€	€	€	%	%
Offline	42-00 Reserved	€		€	€	€		
	42-10 Sales	€		€	€	€	%	%
	42-11 Telemarketing	€		€	€	€	%	%
	42-20 Event/Trade Show	€		€	€	€	%	%
	42-30 Direct Marketing	€		€	€	€	%	%
	42-40 Partner Marketing	€		€	€	€	%	%
	42-50 PR	€		€	€	€	%	%
	42-60 Analyst	€		€	€	€	%	%
	42-70 Advertising	€		€	€	€	%	%
Marketing Assets	43-00 Reserved	€		€	€	€		
	43-10 Collateral	€		€	€	€	%	%
	43-20 Marketing Intelligence	€		€	€	€	%	%
Global Total \$								

# Single View of Customers

Better targeting, personalization and testing

Higher conversion rates and engagement value per visit

Better nurturing and funnel maturation

Higher conversion rates and better ROMI

# What's Next?

Adopting Sitecore 7.5 and xDB right now

Single repository *in Sitecore* of all Customer data

New analytics, new reports – better business intelligence

# Thank you



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# Questions?