

Kentico CMS Hands on Lab



Hands on Lab:
Kentico Enterprise Marketing Solution: Campaigns

Twitter: @trobbins

Email: Thomasr@Kentico.com

Blog: <http://devnet.kentico.com/Blogs/Thomas-Robbins.aspx>

For more information <http://www.kentico.com>

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Hands on Lab: Kentico Enterprise Marketing Solution: Campaigns

Lab Overview

System Requirements:

- Kentico CMS 6.0 Enterprise Marketing Solution installed with the Sample Corporate Site

Intended Lab Audience:

- Online Marketers
- CMS Designers

Lab Introduction

Executing successful campaigns is an essential part of any marketing organization. Campaigns are a way to engage and interact with your customers. They provide an ideal mechanism to generate sales leads and collect customer information. This set of exercises is intended to show the process of creating a document based campaign for the Services page that collects customer information using an online form. Then using the collected customer information we will then score the leads for later use by the sales department. In completing this set of labs you will perform the following tasks:

- Create an Online form for collecting customer information
- Create a squeeze page for collecting customer information
- Create a Services campaign
- Create conversions
- Create a lead score

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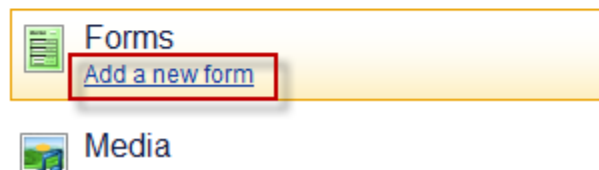
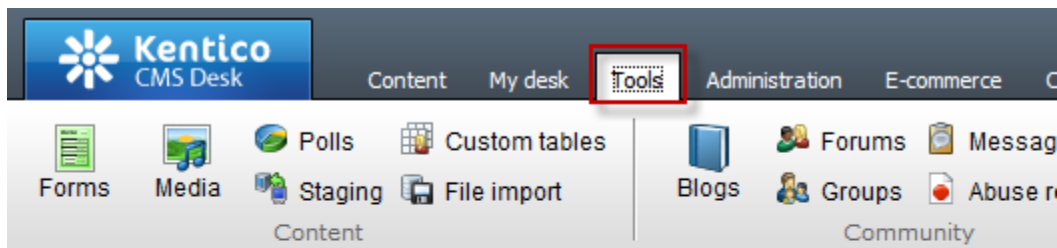
- Optimize a campaign using A/B tests

Lab 1: Creating an online form

Online forms are the easiest way to create a contact information form for the live site without having to write application code. Forms are built using a data driven interface and then inserted into the page using the Online form web part. In this lab we will create the contact information form and then insert it into the Services page, which is then used as the main campaign landing page.

Lab 1-1: Creating an online form

1. Log into **CMS Desk** and select the **Tools** tab and click the **Add a new form** link as shown in the following screenshot



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2. In the **New form** dialog update the following fields and select **Ok**

Field	Value
Form display name	Campaign Contacts
Form code name	Contacts
Table name	Contacts

3. In the **General** tab update the following information and then select **Ok**

Section	Field	Value
After the form is submitted	Display text	We will contact you shortly
	Submit button text	Submit

4. Select the **Fields** tab and click the **Add new attribute (+)** button, add the following fields and then click the **Save field** links

Section	Field	Value
Simple mode	Column name	First_name
Simple mode	Field caption	First name
Simple mode	Field type	Textbox
Simple mode	Maximum length	20

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5. Select the **Add new attribute (+)** button, add the following fields and click the **Save field** link

Section	Field	Value
Simple mode	Column name	Last_name
Simple mode	Field caption	Last name
Simple mode	Field type	Textbox
Simple mode	Maximum length	30

6. Select the **Add new attribute (+)** button, add the following fields and click the **Save field** link

Section	Field	Value
Simple mode	Column name	Email_Address
Simple mode	Field caption	Email
Simple mode	Field type	E-mail

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7. Select the **Add new attribute (+)** button, add the following fields and click the **Save field** link

Section	Field	Value
Simple mode	Column name	Contact_Type
Simple mode	Field caption	How can we help you?
Simple mode	Field type	Drop-down list
Field settings	Data source	Services;Services <CR> RFP; RFP

8. Select the **On-line marketing** tab and select the **Overwrite existing contact information with submitted data. If unchecked, only empty values of a contact are filled** check box as shown in the following screenshot

The screenshot shows the 'Form Properties' dialog box for 'Campaign Contacts'. The 'On-line marketing' tab is selected. The 'Save' button is visible. The 'Log on-line marketing activity' checkbox is checked. The 'Overwrite existing contact information with submitted data. If unchecked, only empty values of a contact are filled.' checkbox is also checked and highlighted with a red box.

Form Properties

> Forms > Campaign Contacts

Data General Fields Form Notification e-mail Autoresponder Security Alternative forms **On-line marketing** Ver

Save

Log on-line marketing activity

The following section allows mapping the form fields on contact object. Then data submitted through the form can be use

Overwrite existing contact information with submitted data. If unchecked, only empty values of a contact are filled.

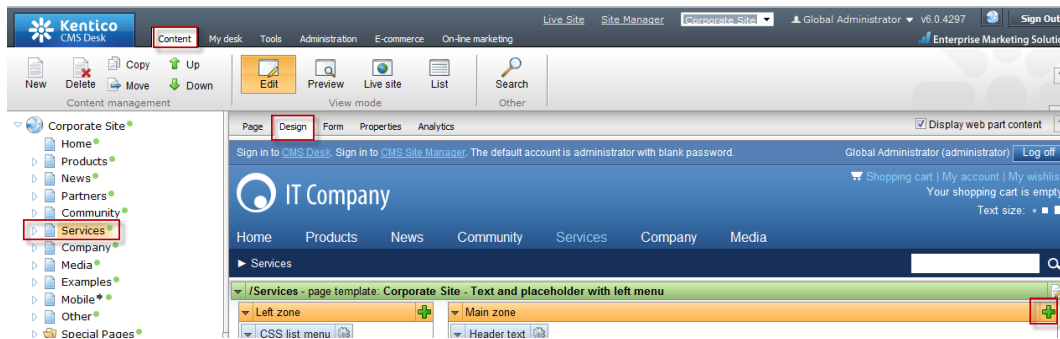
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- Update the following fields and then click the **Save** button

Section	Field	Value
General	First name	First_name
General	Last name	Last_name
Address	E-mail	Email_address

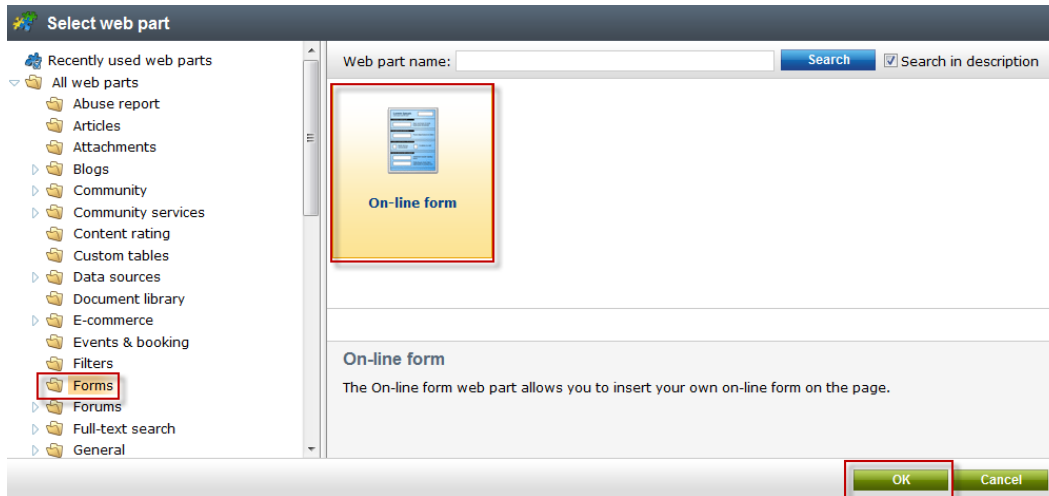
Lab 1-2: Inserting the online form

- Select the **Content** tab, in the Content tree select the **Services** page, then the **Design** tab, and in the **Main zone** select the **Add web part icon (+)** as shown in the following screenshot



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2. In the **Select web part** screen select the **Forms** folder, the **Online form** web part and then **Ok** as shown in the following screenshot

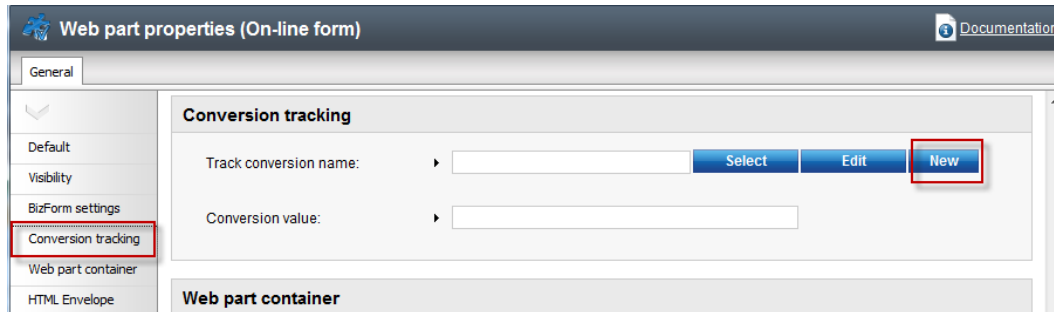


3. In the **Web part properties (On-line form)** update the following values

Section	Field	Value
Bizform settings	Form name	Campaign contacts

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4. Select the **Conversion tracking** tab and then click the **New** button as shown in the following screenshot



What is a conversion?

Conversions are specific actions performed by site visitors and recorded by the Web analytics module. This is typically done for specific events you want to track or as part of a broader campaign. Once you start tracking conversions on the live site, these can be compared to other web analytics statistics such as the amount of visitors. This allows you to evaluate the website and adjust as necessary.

5. In the **New conversion** screen update the following values and select **Save & close**

Field	Value
Conversion display name	ContactInfo
Conversion code name	ContactInfo

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- Update the **Conversion value** field to **20** and then select **Ok** as shown in the following screenshot

The screenshot shows the 'Web part properties (On-line form)' dialog box with the 'Conversion tracking' section selected. The 'Track conversion name' field is set to 'ContactInfo'. The 'Conversion value' field is highlighted with a red box and contains the value '20'. The 'OK' button is also highlighted with a red box. The 'Refresh content' checkbox is checked. The 'Web part container' section is visible below.

- Validate that you see the screen as shown in the following screenshot

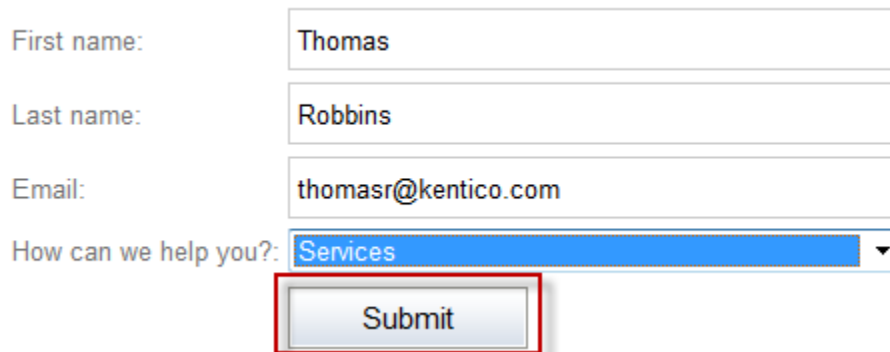
The screenshot shows the Kentico CMS design view. The 'Main zone' contains a form titled 'Services'. The form includes a 'Header text' field, a 'Description text' field, a 'Placeholder' field, and a 'BizForm' field. The 'BizForm' field contains the following text: 'Last name:', 'Email:', 'How can we help you?: Services', and a 'Submit' button. The 'Left zone' contains a 'CSS list menu' and a 'Web Design' section.

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- Click the **Sign out** button as shown in the following screenshot



- On the **Live** site select the **Services** page, update the online form with your contact information and select **Submit** as shown in the following screenshot

A screenshot of a contact form. It consists of four input fields and a submit button. The first field is labeled 'First name:' and contains the text 'Thomas'. The second field is labeled 'Last name:' and contains 'Robbins'. The third field is labeled 'Email:' and contains 'thomasr@kentico.com'. The fourth field is labeled 'How can we help you?:' and is a dropdown menu with 'Services' selected. Below the dropdown is a 'Submit' button, which is highlighted with a red rectangular box.

- Once the form is submitted validate that you see the following screenshot

Services

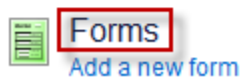
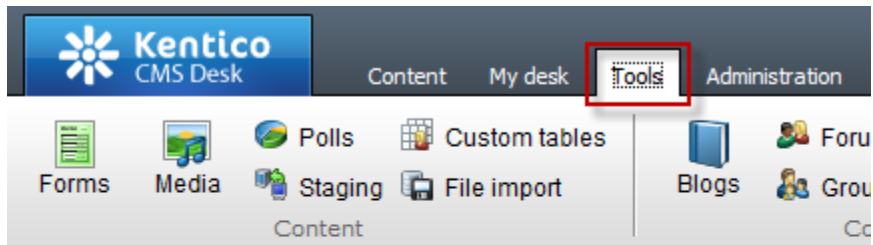
This is a sample static website section consisting of this title page and three sub-pages. Its purpose is to display static information about the services that the company provides.

All pages in this section are created using the **Page (menu item)** document type and are stored as standard documents in Kentico CMS content tree. The sub-pages are accessible by clicking the links in the left navigation, which is a part of the page template used by this page. If you have a section like this on your website, Kentico CMS allows you to offer the listed services to be purchased directly via the integrated web shop, as demonstrated in the [Products -> IT services](#) section.

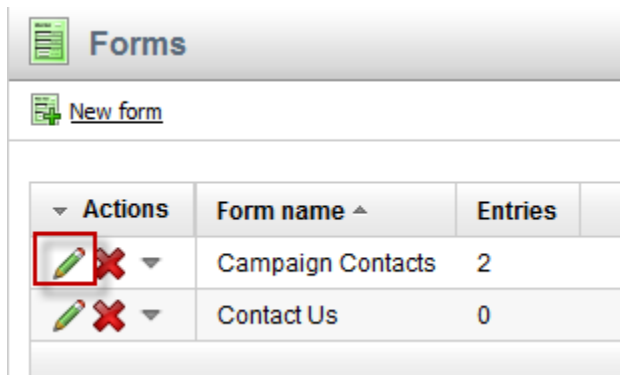
We will contact you shortly!

- Log into **CMS Desk**, select the **Tools** tab, then select **Forms** as shown in the following screenshot

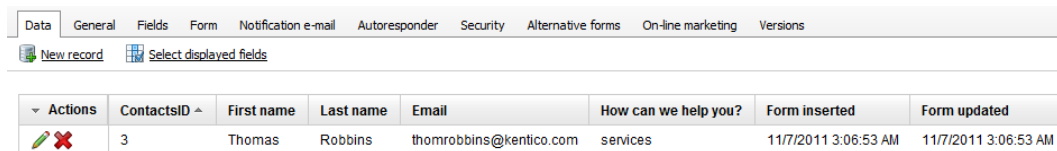
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12. In the **Forms** screen select the **Edit icon (pencil)** for the **Campaign Contacts** as shown in the following screenshot

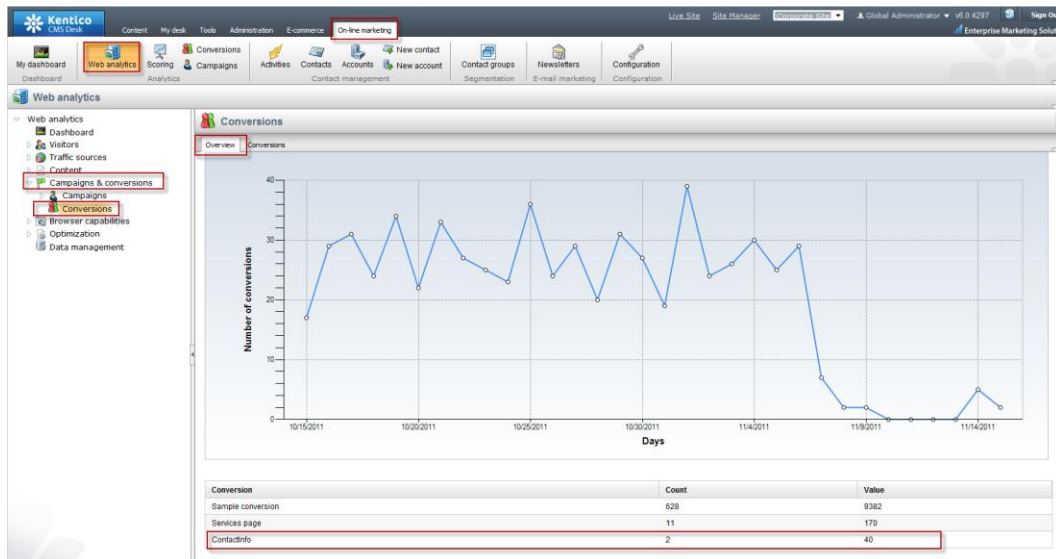


13. Validate that you see your data as shown in the following screenshot



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- Click the **On-line marketing** tab, then select the **Web analytics** button, click **Campaigns & conversions**, then click the **Conversion** report, select the **Overview** tab and validate that you see a **Conversion** report similar to the following



Lab 2: Creating the Services campaign

Kentico EMS offers a variety of ways to create campaigns. Each is dependent on the type and purpose of your marketing strategy. With the completion of the online form we are now ready to create the document based campaign for the Services page. This campaign includes page visits to the Services page and completion of the online form.

Lab 2-1: Create a document campaign

- Select the **Content** tab, in the Content tree select the **Services** page, then click the **Analytics** tab, **Settings** tab and in **Track campaign** select the **New** button as shown in the following screenshot

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Page Design Form Properties **Analytics**

► Analytics

Reports **Settings** A/B tests MVT tests MVT variants

Track campaign:

Track conversion name:

Conversion value:

2. In the **New campaign** web page dialog update the following fields and select **Save & close**

Section	Field	Property
Campaign basic settings	Campaign display name	Services campaign
Campaign basic settings	Campaign name	ServicesCampaign
Campaign basic settings	Open from	Now
Campaign basic settings	Open to	Now + 2 weeks
Campaign advanced settings	Campaign impressions	20000
Campaign advanced settings	Total cost	10000

3. In the **Track conversion name** click the **New** button as shown in the following screenshot

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Page Design Form Properties Analytics

> Analytics

Reports Settings A/B tests MVT tests MVT variants

Track campaign:

Track conversion name:

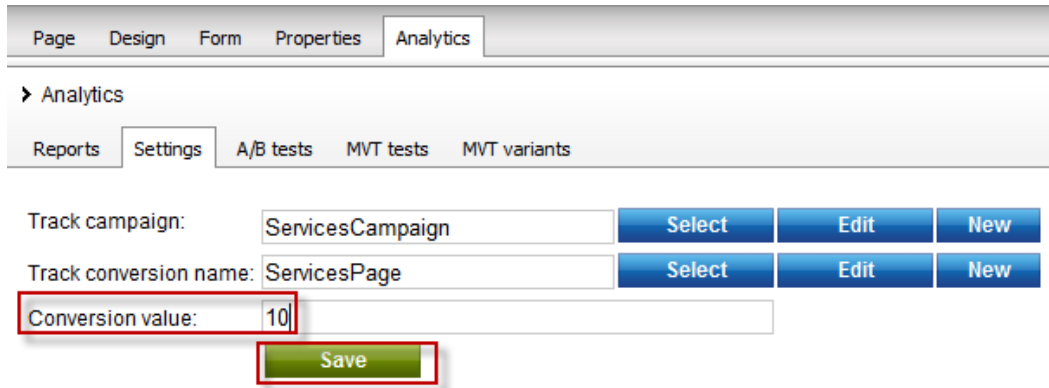
Conversion value:

4. Update the following fields and then select **Save & close**

Field	Value
Conversion display name	Services page
Conversion code name	ServicesPage

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5. In the **Conversion value** field enter **10** and then select **Save** as shown in the following screenshot



The screenshot shows the 'Analytics' tab in the Kentico CMS interface. Under the 'Settings' sub-tab, there are three rows of configuration options:

- Track campaign: ServicesCampaign (with Select, Edit, and New buttons)
- Track conversion name: ServicesPage (with Select, Edit, and New buttons)
- Conversion value: 10 (with a Save button)

The 'Conversion value' field and the 'Save' button are highlighted with red boxes.

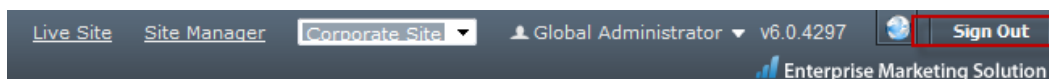


Why another conversion?

The Services page campaign includes two tracked conversions. The first we created earlier with the online form. This conversion tracks the traffic on the Services page.

Lab 2-2: Creating Campaign Data

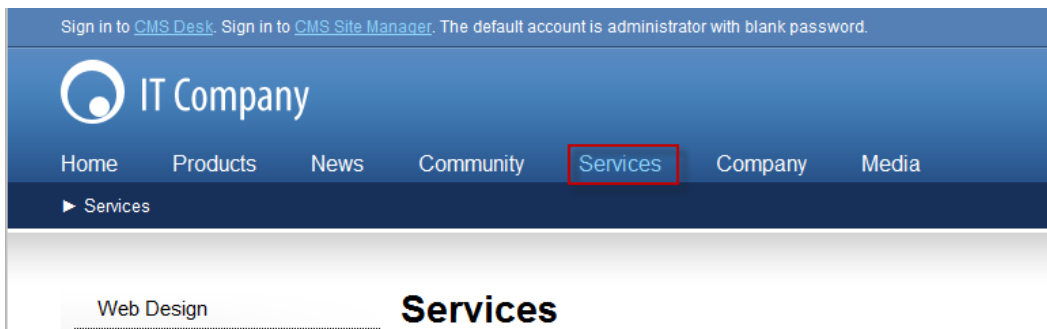
1. Select **Sign out** from CMS Desk as shown in the following screenshot



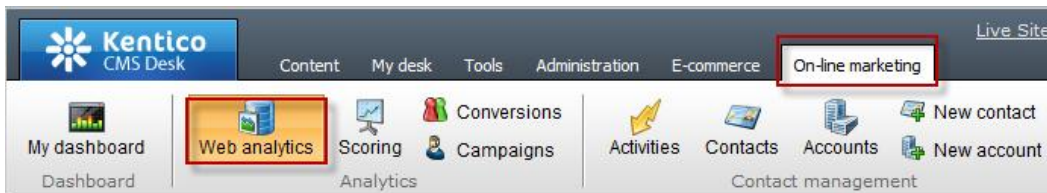
The screenshot shows the top navigation bar of the Kentico CMS interface. It includes links for 'Live Site', 'Site Manager', and a dropdown menu for 'Corporate Site'. The user is logged in as 'Global Administrator' with version 'v6.0.4297'. The 'Sign Out' button is highlighted with a red box.

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2. On the **Live** site select the **Services** page as shown in the following screenshot

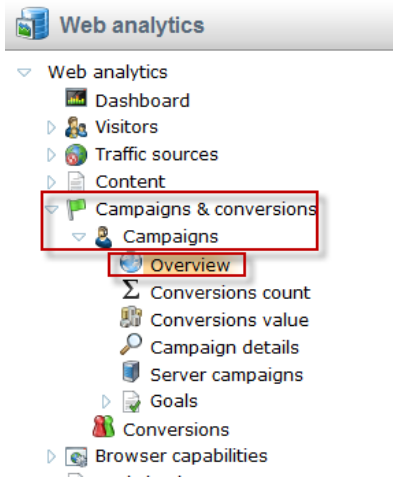


3. Log into **CMS Desk**, select the **On-line marketing** tab, and then the **Web analytics** button as shown in the following screenshot

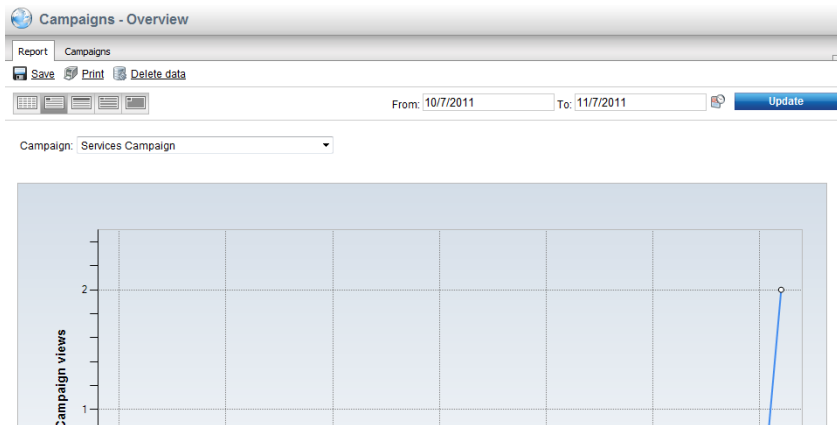


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4. In the **Web analytics** list select the **Campaigns & conversion**, then **Campaigns** and finally select the **Overview** report as shown in the following screenshot

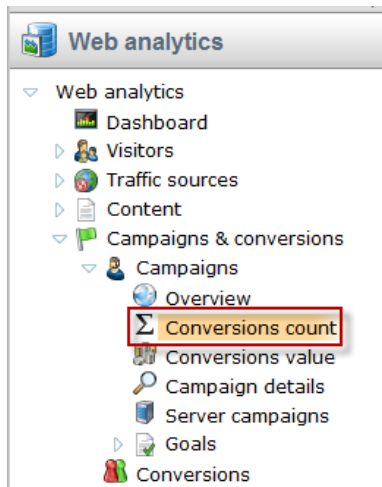


5. In the **Campaign** drop down select the **Services campaign** and validate that you see a report similar to the following screenshot

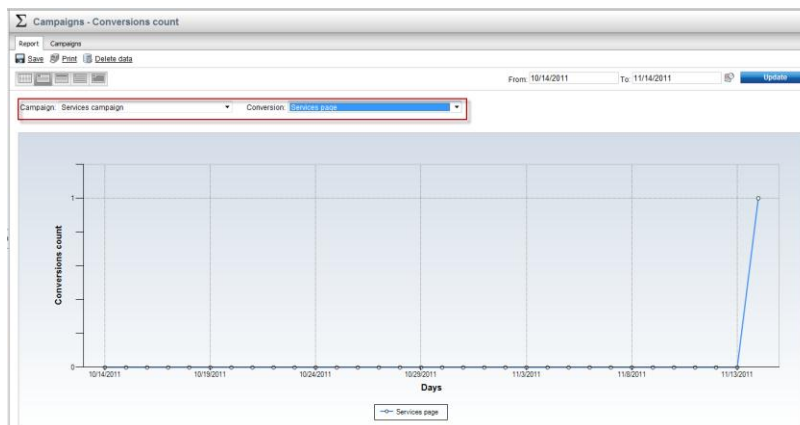


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6. Select the **Conversion count** report as shown in the following screenshot



7. In the **Campaign** dropdown select the **Services campaign**, then in the **Conversion** dropdown select the **Service page** and validate that you see a report similar to the following screenshot



Lab 3: Optimizing Campaigns with A/B testing

As a campaign progresses it's important to continually evaluate and refine. This can often include page elements like messaging and typography to find better ways to engage site visitors. In this lab we will create an A/B test of our services page as a way to increase our campaign conversions. Within Kentico EMS the first step is to create the A/B test and then create the variant page that will be used for the testing process.

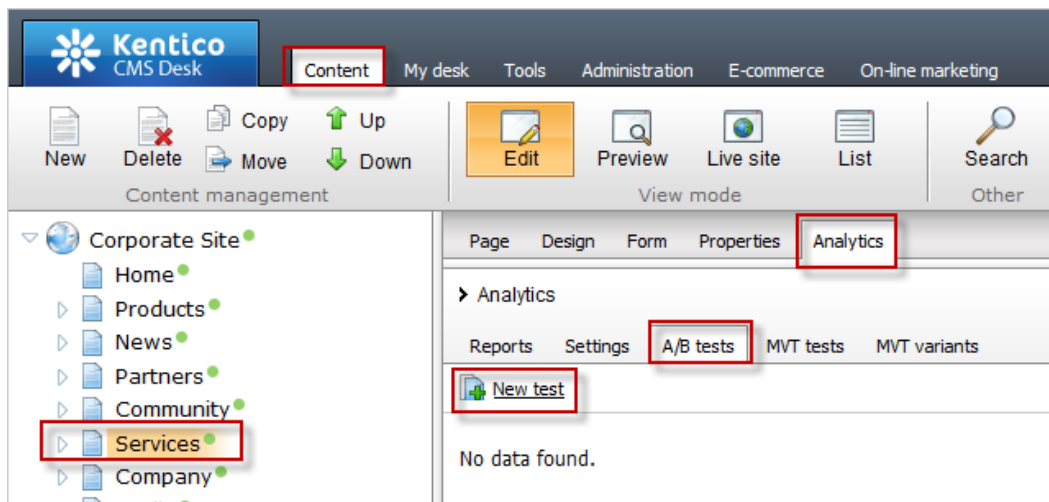


What's the difference between A/B and MVT Testing?

A/B testing is different than MVT Testing. An A/B test uses a combination of pages and tests elements like copy text, layouts, images and colors. MVT Testing is focused on web part zones, web parts, and widgets.

Lab 3-1: Creating the A/B test

1. Log into **CMS Desk**, select the **Content** tab, in the Content tree select the **Services** page, select the **Analytics** tab, select the **A/B tests** tab and click the **New test** link as shown in the following screenshot



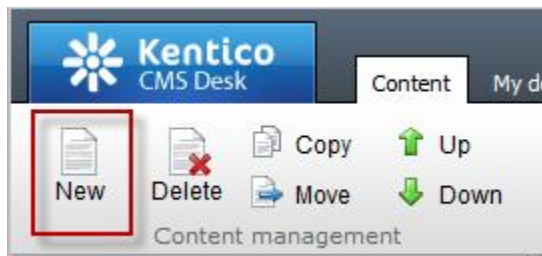
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2. Update the following fields and then select **Ok**

Field	Value
Display name	AB Services
Code name	AB_Services
Target number of conversions	100
Test from	Now
Test to	Now + 2 weeks
Test enabled	Checked

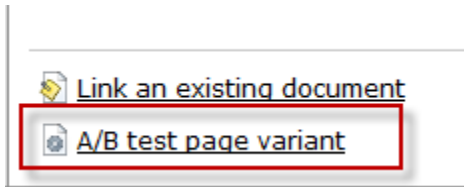
Lab 3-2: creating the variant page

1. Select the **New** button as shown in the following screenshot



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- In the **New document** screen select the **A/B test page variant** link as shown in the following screenshot

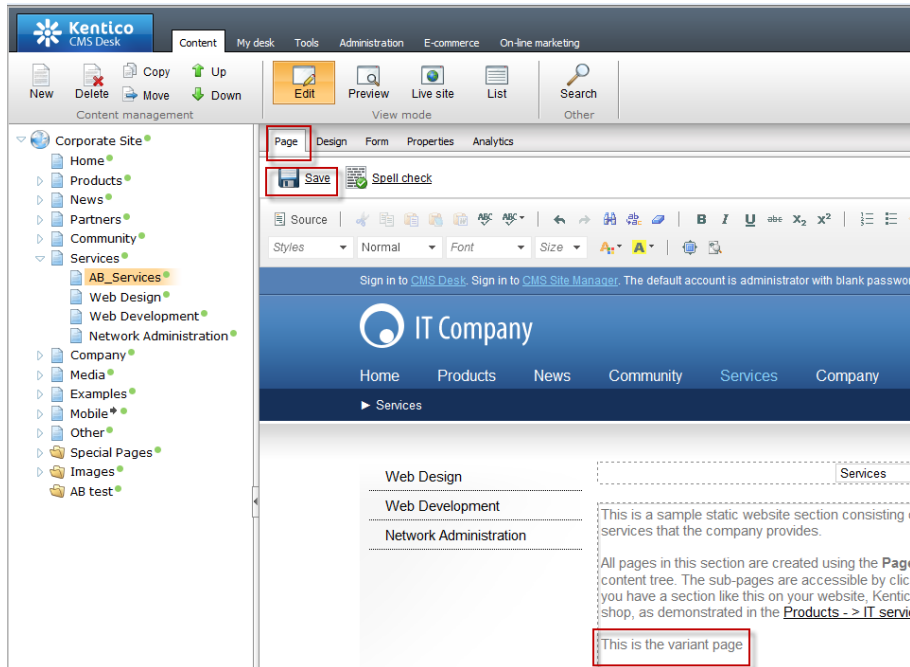


- Update the following fields and then select **Save**

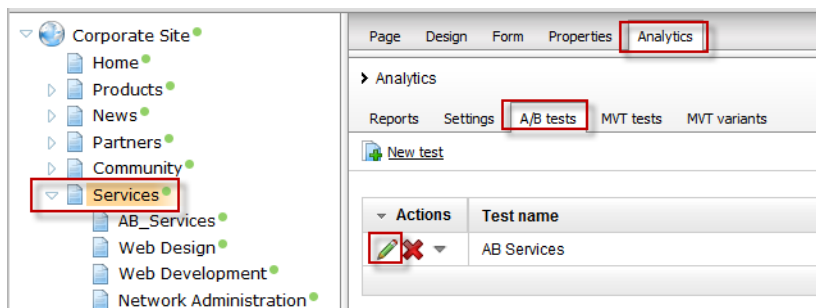
Field	Value
Document name	AB_Services
Assign to A/B test	AB Services

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4. Select the **Page** tab and in the Editable region add the text **This is the variant page** and select **Save** as shown in the following screenshot

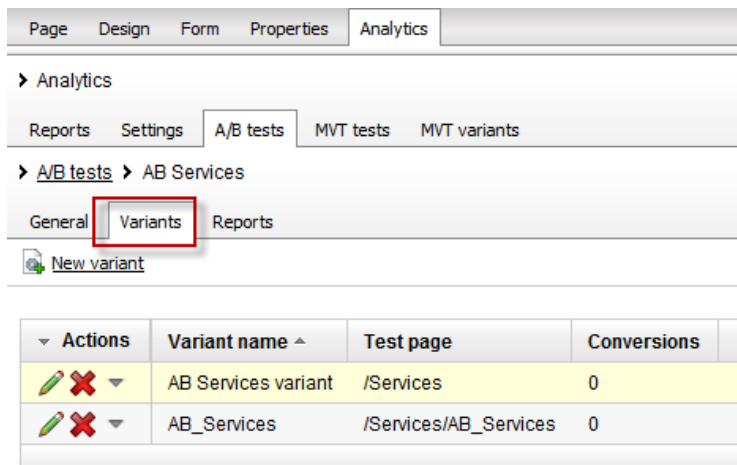


5. In the Content tree select the **Services** page, then select the **Analytics** tab, then the **A/B tests** tab and for the **AB Services** test click the **Edit (pencil)** icon as shown in the following screenshot







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6. Select the **Variants** tab as shown in the following screenshot



The screenshot shows the Kentico CMS interface. At the top, there are tabs for 'Page', 'Design', 'Form', 'Properties', and 'Analytics'. Under 'Analytics', there are sub-tabs for 'Reports', 'Settings', 'A/B tests', 'MVT tests', and 'MVT variants'. The 'A/B tests' sub-tab is selected, and under it, 'AB Services' is selected. Within 'AB Services', the 'Variants' tab is highlighted with a red box. Below the tabs, there is a 'New variant' button. A table below shows the current variants:

Actions	Variant name ^	Test page	Conversions
 	AB Services variant	/Services	0
 	AB_Services	/Services/AB_Services	0



What is this?

The variants tab shows the current page variants that are included as part of the running AB Services test.

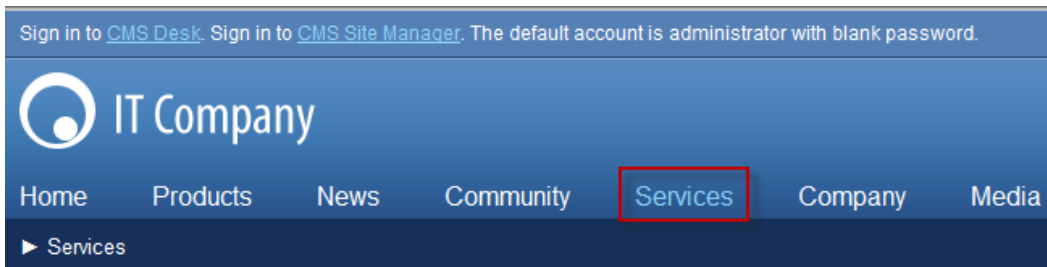
7. Sign the **Sign out** button as shown in the following screenshot



The screenshot shows the footer of the Kentico CMS interface. It includes links for 'Live Site', 'Site Manager', and a dropdown menu for 'Corporate Site'. The user is identified as 'Global Administrator' with version 'v6.0.4297'. The 'Sign Out' button is highlighted with a red box. The footer also mentions 'Enterprise Marketing Solution'.

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- On the **Live** site select the **Services** page as shown in the following screenshot



It's random!

Remember the page received is random. Once you receive the Services page the cookie distributed to your machine will always open the same page. If you have a second browser available go ahead and try it!

Lab 4: Scoring contacts

With the campaign running and proper demand generation our page will begin to receive site visits and contact form submissions. Once leads are collected they can be scored to show the weighting of their potential opportunities for our sales staff. In this lab we will enter our contact information and then create an Activity based scoring rule.

Lab 4-1: Creating the contact

1. From the **Live site** select the **Services** page, in the **Contact form** enter your contact information and click the **Submit** button as shown in the following screenshot

All pages in this section are created using the **Page (menu item)** document type and all pages are accessible by clicking the links in the left navigation, which is a part of the page website, Kentico CMS allows you to offer the listed services to be purchased directly via this section.

First name:

Last name:

Email:

How can we help you?:

2. Log into **CMS Desk** as **Administrator** and select the **On-line marketing** tab, click the **Activities** tab and validate that you see the form submission as shown in the following screenshot

Activities

Activities Activity types

[New custom activity](#)

Type: (all)

Title: LIKE

Contact name: LIKE

IP address: LIKE

Time between: Now and Now

<input type="checkbox"/>	Actions	Title	Type	Contact name	IP address	Activity time
<input type="checkbox"/>		Form submitted 'Contacts'	Form submission	Thomas Thomas	127.0.0.1	11/7/2011 11:44:53 AM
<input type="checkbox"/>		Page visit 'Services'	Page visit	Thomas Thomas	127.0.0.1	11/7/2011 11:44:34 AM
<input type="checkbox"/>		Page visit 'Home'	Page visit	Thomas Thomas	127.0.0.1	11/7/2011 11:44:26 AM

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3. Select the **Contacts** tab and then select the **Edit icon (pencil)** as shown in the following screenshot

Contacts

[New contact](#)

First name: LIKE

Last name: LIKE



E-mail: LIKE

Contact status: (all)

Show: All Only monitored Only non-monitored

Search

▼ [Display advanced filter](#)

<input type="checkbox"/>	Actions	First name	Last name ^	E-mail	Contact status	Country
<input type="checkbox"/>	 	Thomas	Thomas	thomasr@kentico.com		

4. Validate that you see the **Contact properties** as shown in the following screenshot

Contact properties

Contacts > Thomas Robbins

General Accounts Membership Activities IPs Contact groups Scoring Merge

Save

The changes were saved.


General

First name: Thomas Last name: Robbins

Middle name: Salutation:

Title before: Title after:

Personal info

Birthday:  Now Job title:

Gender: (unknown) Created: 11/7/2011 11:44:26 AM

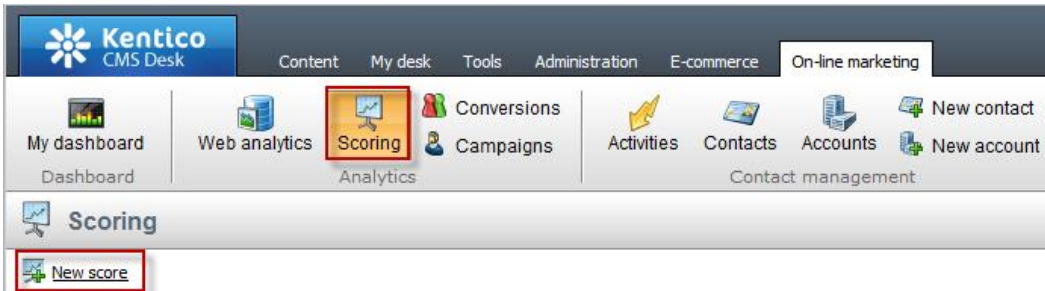
Contact settings

Contact status: (none) Contact owner: **Select** **Clear**

Track activities: Campaign: Services Campaign

Lab 4-2: Creating the scoring rules

1. Click the **Scoring** button and then select the **New score** link as shown in the following screenshot



2. In the **New score** screen update the following values and select **Save**

Field	Value
Display name	Services
Code name	Services

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3. In the **General** tab update the following fields and select **Save**

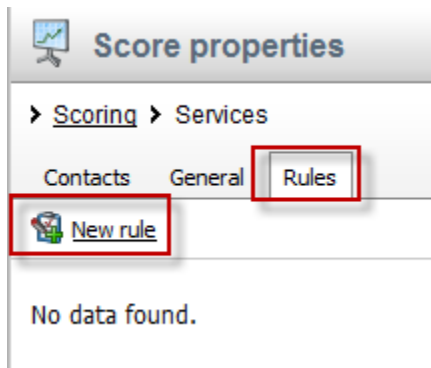
Field	Value
Send notification at score	20
Notification e-mail address	Your email



Why enter another score?

When a contact score reaches the value of 20, a notification email is automatically generated to the email address specified.

4. Select the **Rules** tab and select the **New rule** link as shown in the following screenshot



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5. In the **New rule** screen update the following fields

Field	Value
Display name	Campaign contacts
Code name	Campaigncontacts
Value	20
Rule Type	Activity



What is the rule type?

Rules are used to segment contacts for scoring. Kentico EMS supports two types of rules. Attribute based rules look for similarities in system values. Activity rules are based on the completion of a specific activity.

6. Update the following fields and then select **Save**

Section	Field	Value
Rule Settings	Activity	Form Submission
Activity details	Form	Campaign Contacts

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7. Select the **General** tab and click the **Recalculate** link as shown in the following screenshot

Score properties

> Scoring > Services

Contacts General Rules

Save Recalculate

Display name: Services

Code name: Services

Description:

Enabled:

Send notification at score: 20

Notification e-mail address: thomasR@kentico.com

Schedule rebuild:

Score info

Status: **Recalculation required**

Last recalculation time: N/A

8. Click the **Contacts** tab and validate that you see your contact information as shown in the following screenshot

> Scoring > Services

Contacts General Rules

Score: >=

Search

<input type="checkbox"/>	Actions	Full name	Contact status	Score
<input type="checkbox"/>		Thomas Robbins		20

Selected contacts (select an action) OK

Summary

In this set of Hands on Labs we looked at how to create a campaign and collect customer information. We then looked at how we can optimize this campaign further with an A/B test. Specifically, we covered the following.

- Creating an online form
- Linking an online form to contacts with EMS
- Creating a document campaign
- Creating an A/B test
- Collecting contact information
- Scoring contacts

Key Resources:

- <http://devnet.kentico.com/Documentation.aspx>
- <http://devnet.kentico.com/Videos/ABTest.aspx>