Kentico CMS 7

Hands on Lab:
Kentico Enterprise Marketing Solution: Campaigns

August, 2012

Twitter: @trobbins
Email: Thomasr@Kentico.com
Blog: http://devnet.kentico.com/Blogs/Thomas-Robbins.aspx

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

Table of Contents

Hands on Lab: Kentico Enterprise Marketing Solution: Campaigns

Lab Overview

System Requirements:

- Kentico CMS 7 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

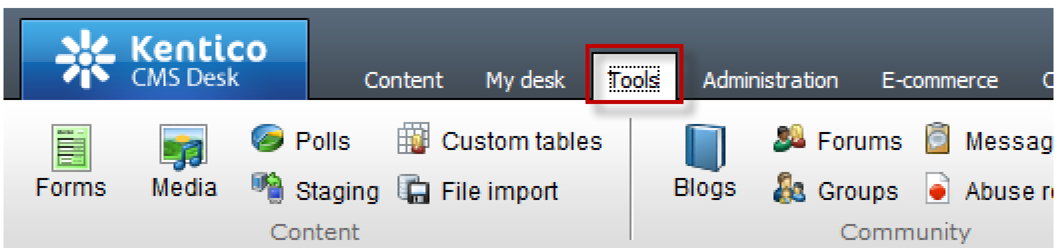
- Optimize a campaign using A/B tests

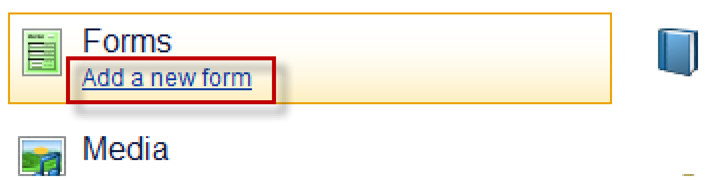
Lab 1: Creating an online form

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.

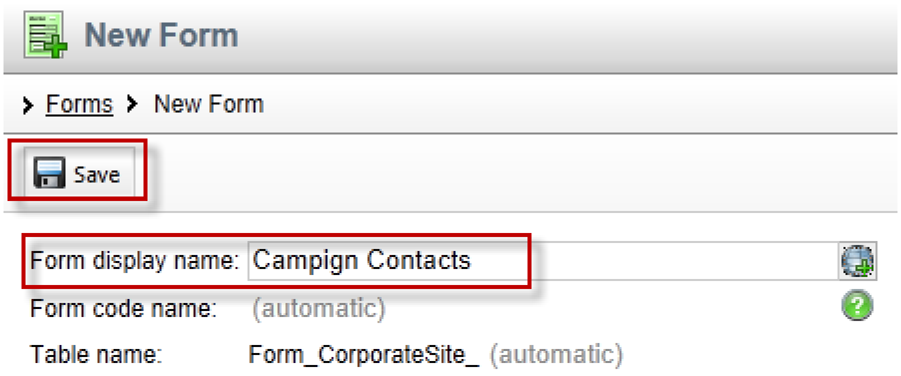
Lab 1-1: Creating an online form

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





2. In the **New form** dialog in the **Form display name** field enter **Campaign Contacts** and then click the **Save** button as shown in the following screenshot.



3. In the **Campaign Contacts** form in the **General** tab update the following fields and then select **Save.**

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

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

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**

5. Select the **Add new attribute (+)** button, update the following fields and then click the **Save** button.

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**

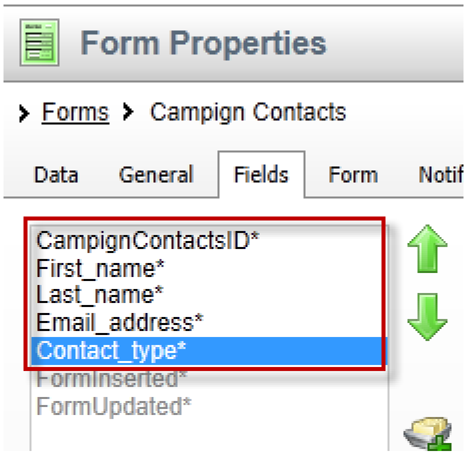
6. Select the **Add new attribute (+)** button, update the following fields, and then click the **Save** button.

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

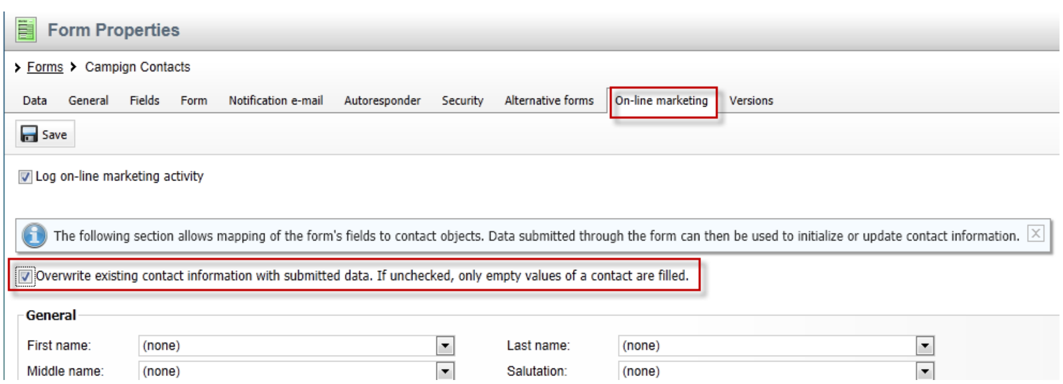
7. Select the **Add new attribute (+)** button, update the following fields, and the click the **Save** button.

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**
Editing control settings	**Type**	**Options (one value; name pair on each line-example 1;Blue)**
Editing control settings	**Data source**	**Services;Services <CR> RFP; RFP**

8. In the **Fields** tab validate the list of fields as shown in the following screenshot.



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

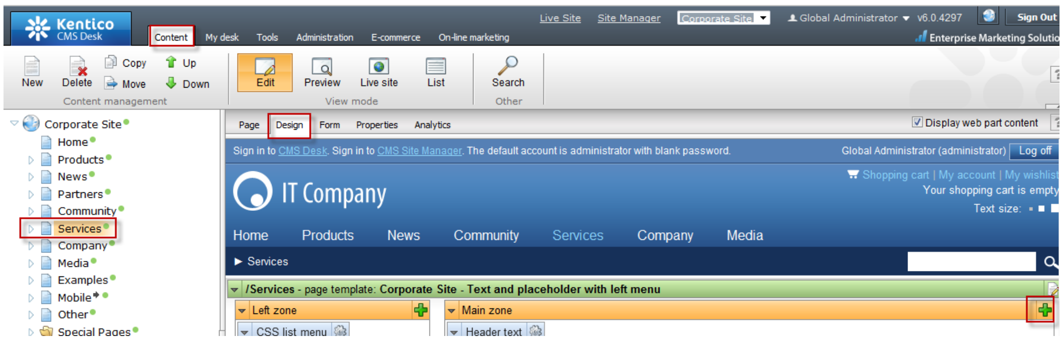


10. In the **On-line marketing** tab update the following fields and then click the **Save** button

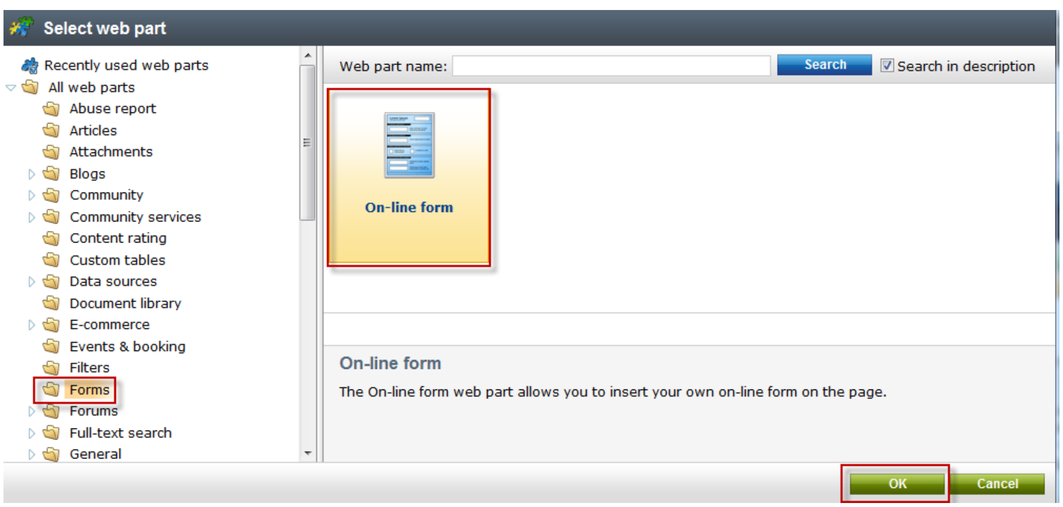
Section	Field	Value
General	**First name**	**First_name**
General	**Last name**	**Last_name**
Address	**E-mail**	**Email_address**

Lab 1-2: Inserting the online form

1. In CMS Desk 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.



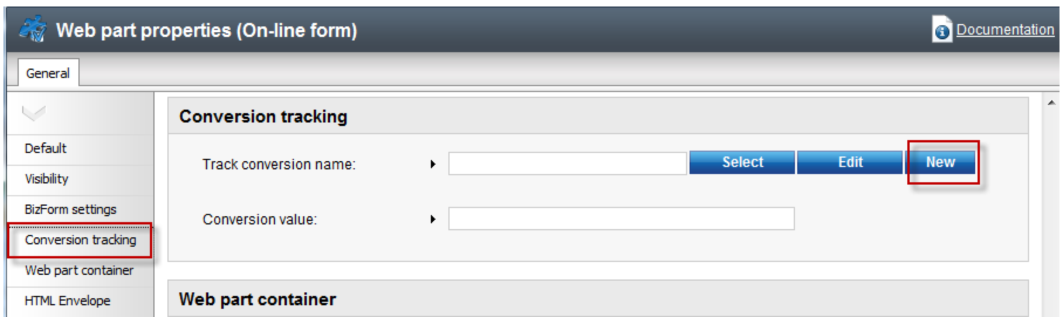
2. In the **Select web part** screen select the **Forms** folder, the **Online form** web part and then **Ok** as shown in the following screenshot.

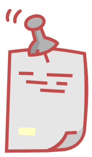


3. In the **Web part properties (On-line form)** update the following value.

Section	Field	Value
Bizform settings	**Form name**	**Campaign_Contacts**

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

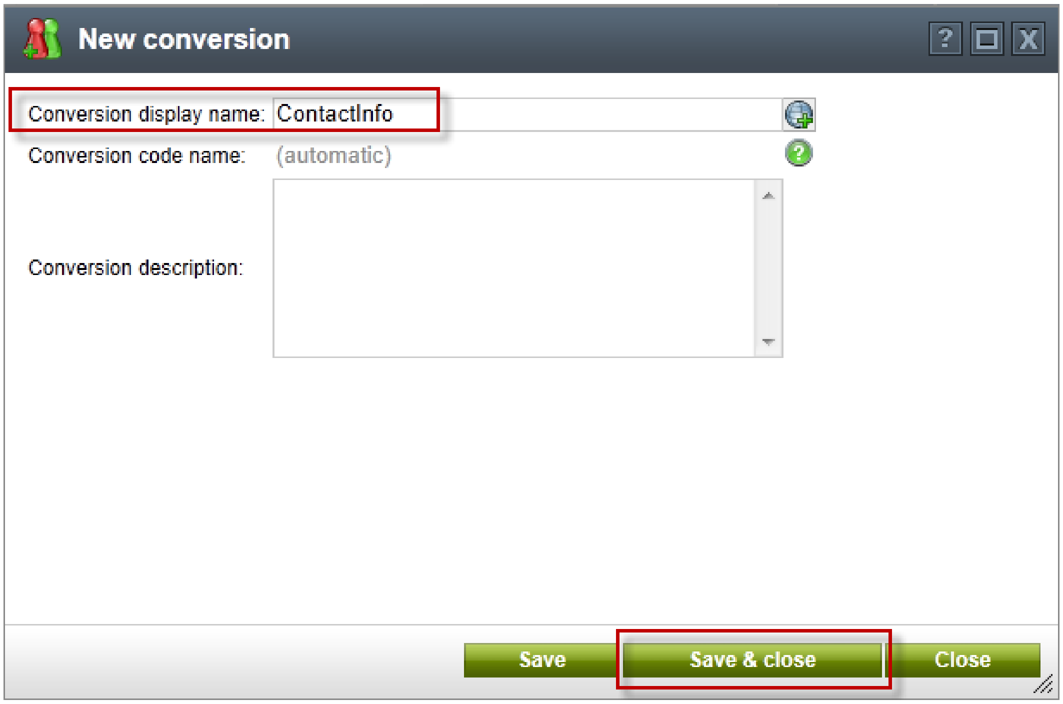




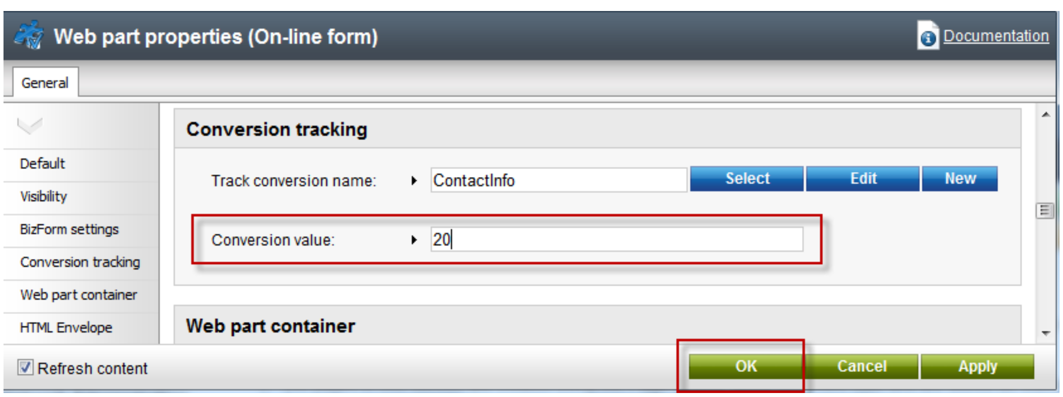
What is a conversion?

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 like the amount of visitors. This allows you to evaluate the website and adjust marketing strategies as necessary.

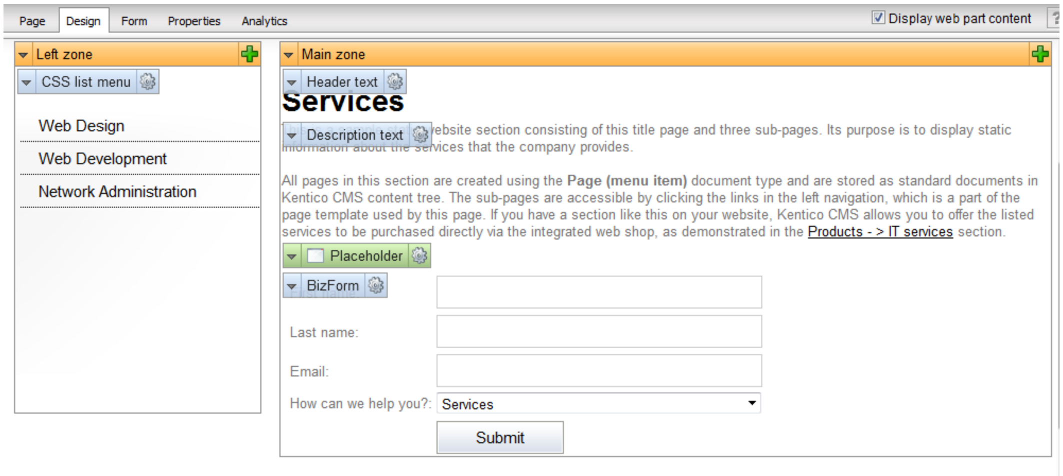
5. In the **New conversion** screen in the **Conversion display name** field enter **ContactInfo** and then select **Save& close** as shown in the following screenshot.



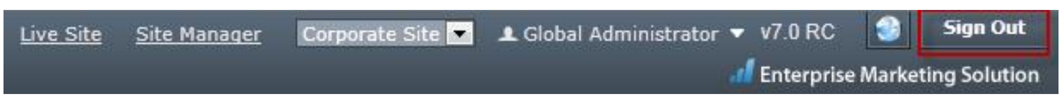
6. In the **Web part properties (On-line form)** screen in the **Conversion value** field enter **20** and then select **Ok** as shown in the following screenshot.



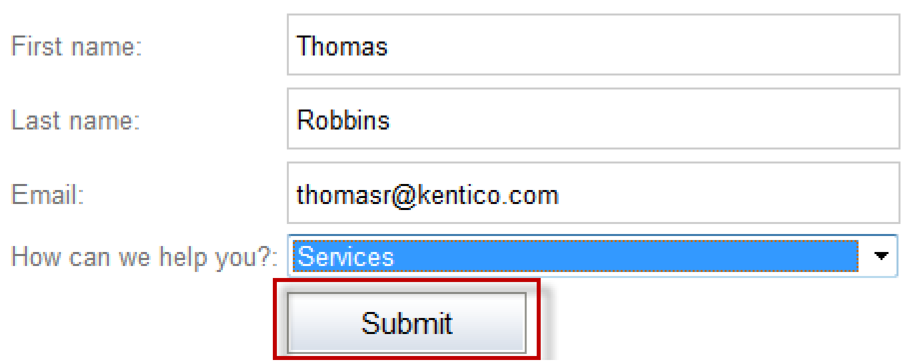
7. Validate that you see the screen as shown in the following screenshot.



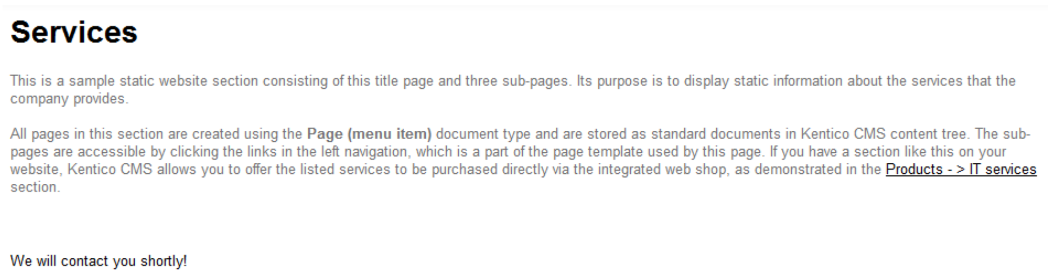
8. In the upper right hand corner click the **Sign out** button as shown in the following screenshot.



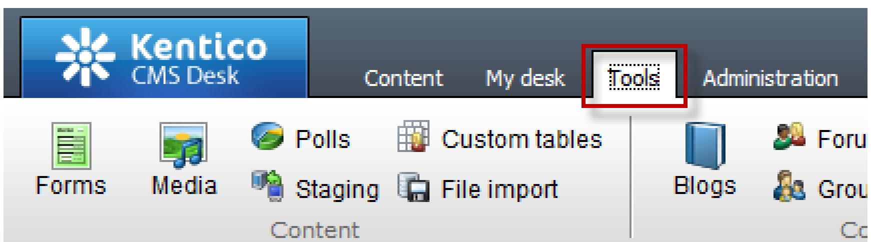
9. On the **Live** site select the **Services** page, update the online form with your contact information and select **Submit** as shown in the following screenshot.



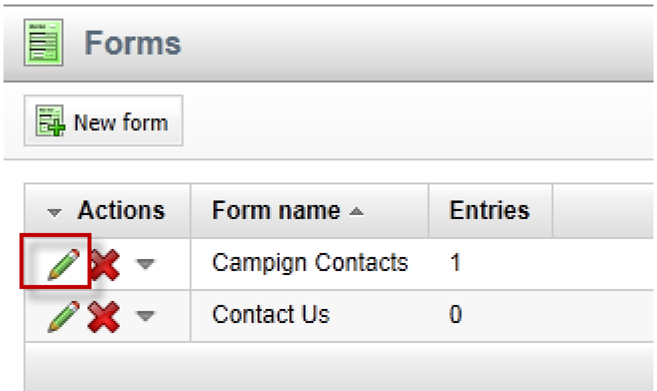
10. Once the form is submitted validate that you see the following screenshot.



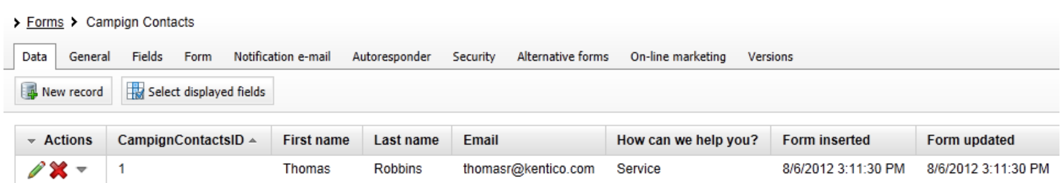
11. Log into **CMS Desk**, select the **Tools** tab, then select **Forms** as shown in the following screenshot



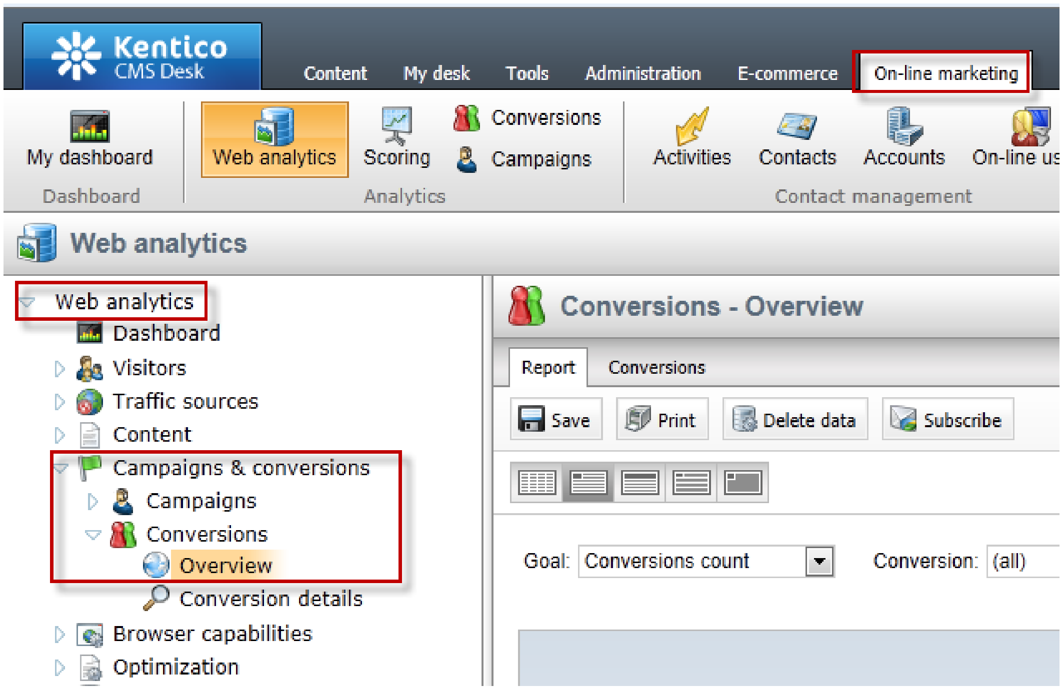
12. In the **Forms** screen select the **Edit icon (pencil)** for **Campaign Contacts** as shown in the following screenshot.



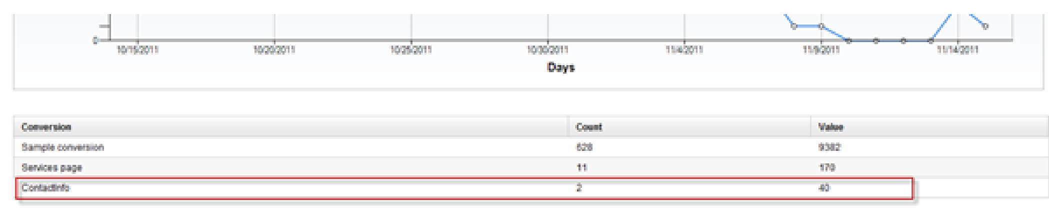
13. Validate that you see the data as shown in the following screenshot.



14. Click the **On-line marketing** tab, then select the **Web analytics** button, in the **Web analytics** list expand **Campaigns & conversion**, then expand **Conversions** and select **Overview** as shown in the following screenshot.



15. Validate that you see a report similar to the following screenshot.



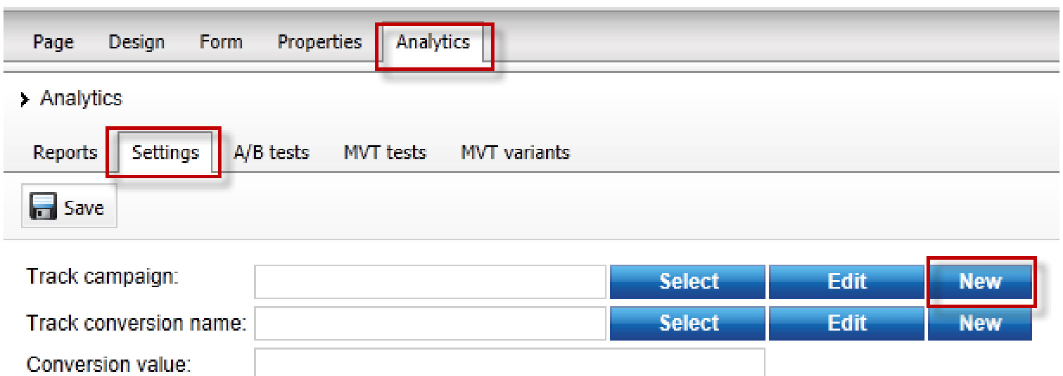
Conversion	Count	Value
Sample conversion	628	9382
Services page	11	170
ContactInfo	2	40

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

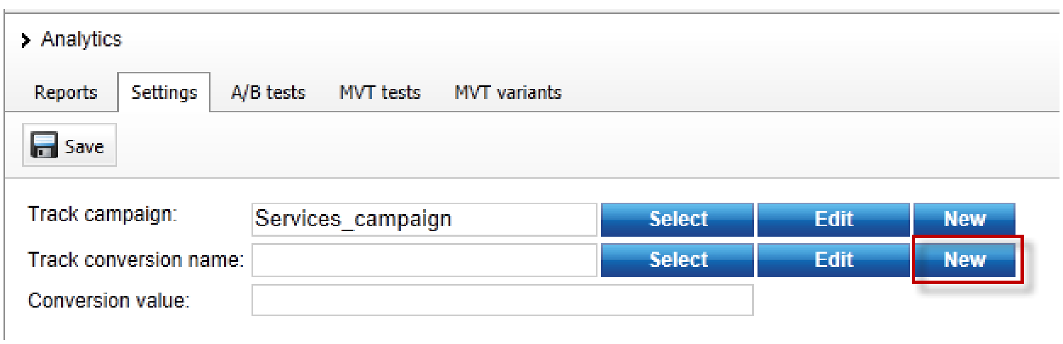
1. Select the **Content** tab, in the Content tree select the **Services** page, then click the **Analytics** tab, **Settings** tab and in **Track campaign** select the **New** button as shown in the following screenshot.



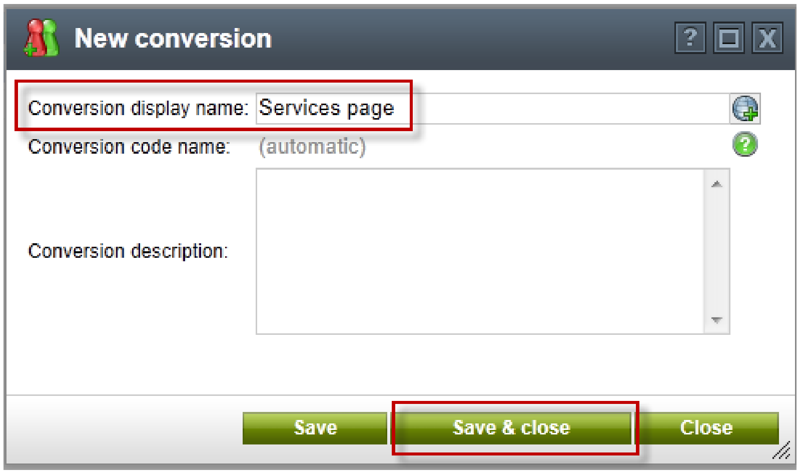
2. In the **New campaign** dialog update the following fields and select **Save & close.**

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

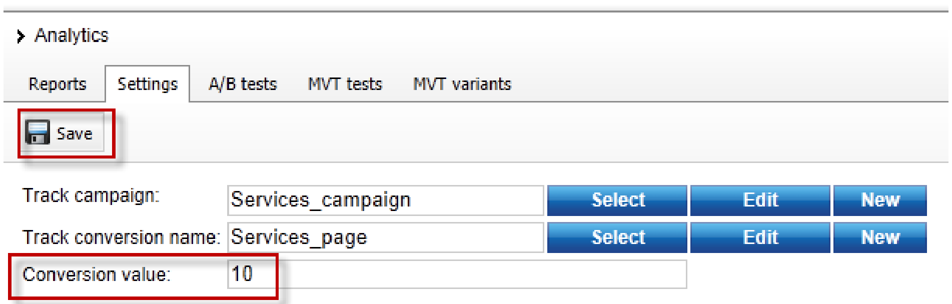
3. In the **Track conversion name** click the **New** button as shown in the following screenshot.

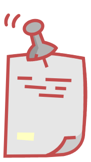


4. In the **New conversion** dialog in the **Conversion display name** field enter **Services page** and then select **Save & close** as shown in the following screenshot.



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



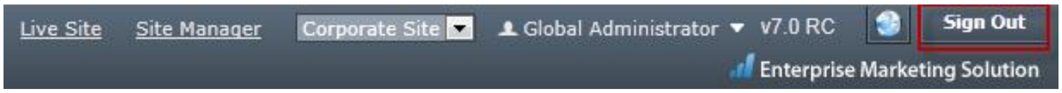


Why another conversion?

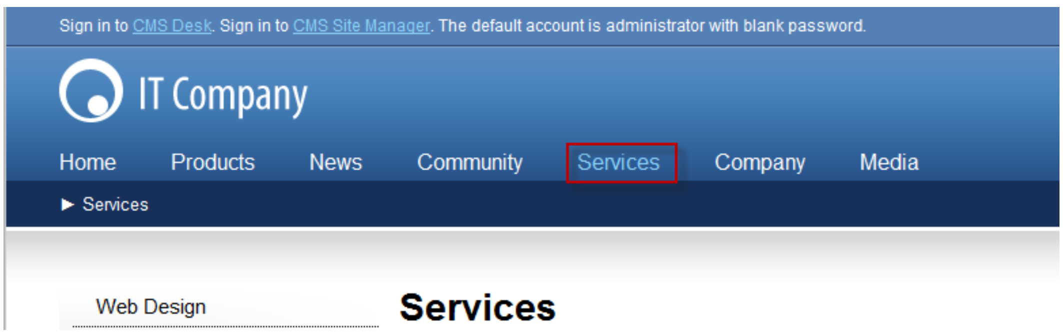
The Services page campaign includes two tracked conversions. The first we created earlier with the online form. The Service page conversion tracks the traffic to the Services page.

Lab 2-2: Creating Campaign Data

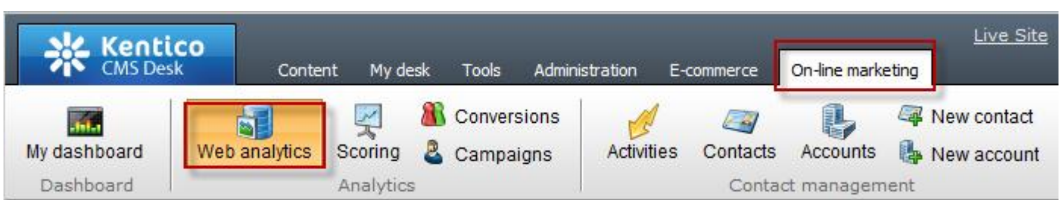
1. In the upper right hand corner click the **Sign out** button as shown in the following screenshot.



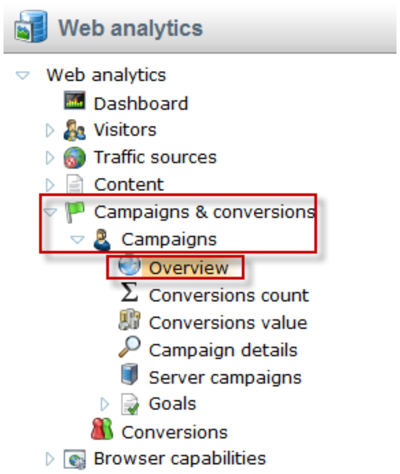
2. On the **Live** site select the **Services** page as shown in the following screenshot.



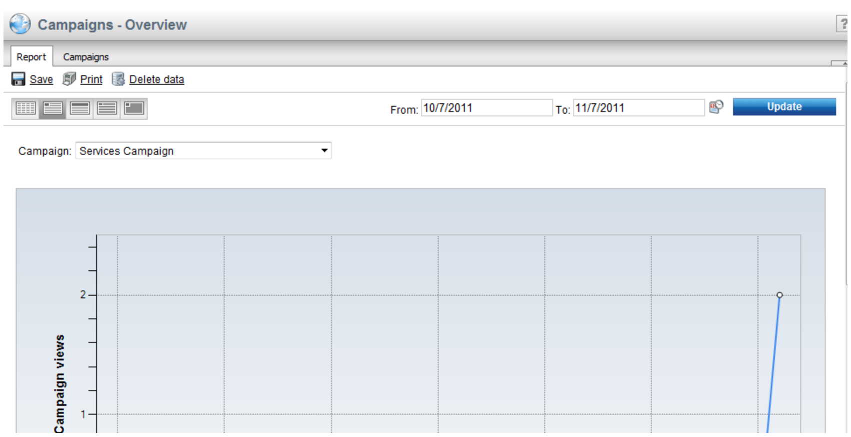
3. Log into **CMS Desk**, select the **On-line marketing** tab, and then the **Web analytics** button as shown in the following screenshot.



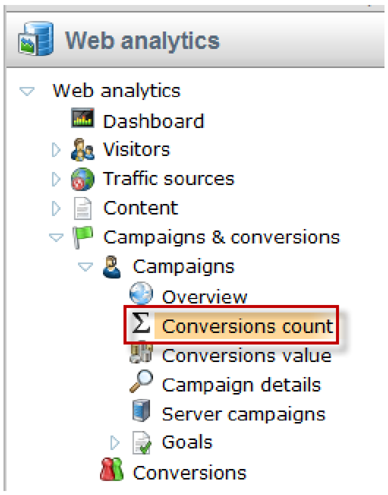
4. In the **Web analytics** list expand **Campaigns & conversion**, then expand **Campaigns** and then select the **Overview** report as shown in the following screenshot.



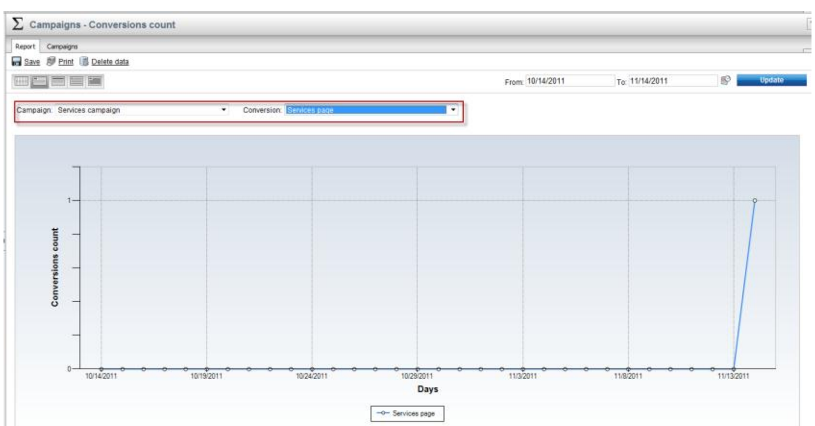
5. In the **Campaign** drop down select the **Services campaign** and validate that you see a report similar to the following screenshot.



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

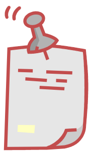


7. In the **Campaign** dropdown select the **Services campaign**, then in the **Conversion** dropdown select the **Service page** and validate that you see a report similar to the following screenshot.



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.

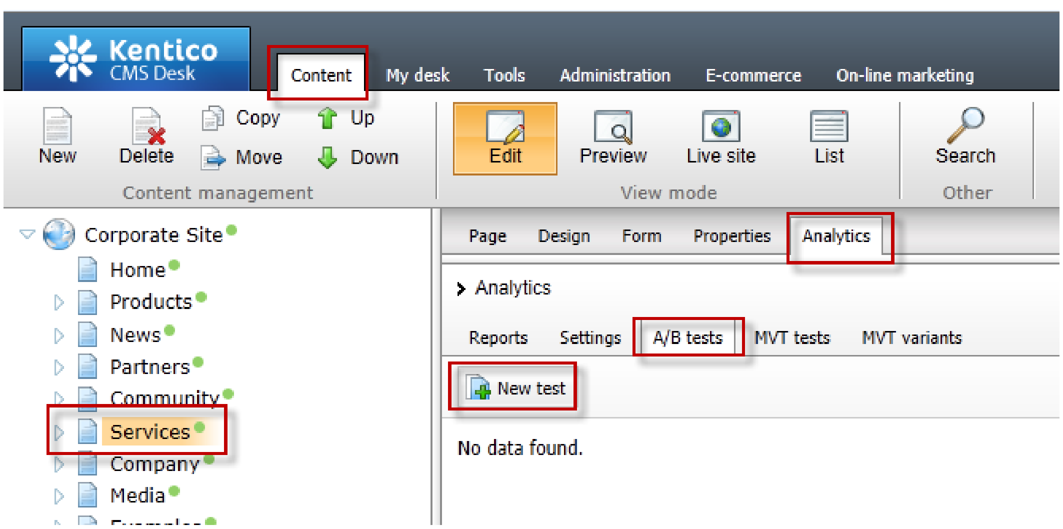


What's the difference between A/B and MVT Testing?

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. 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

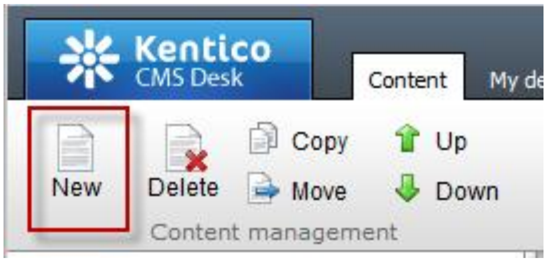


2. In the **New test** screen update the following fields and then select the **Save** button.

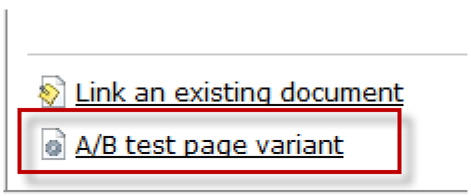
Field	Value
Display name	**AB Services**
Target number of conversions	**100**
Test from	**Now**
Test to	**Now + 2 weeks**
Test enabled	**Checked**

Lab 3-2: creating the variant page

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



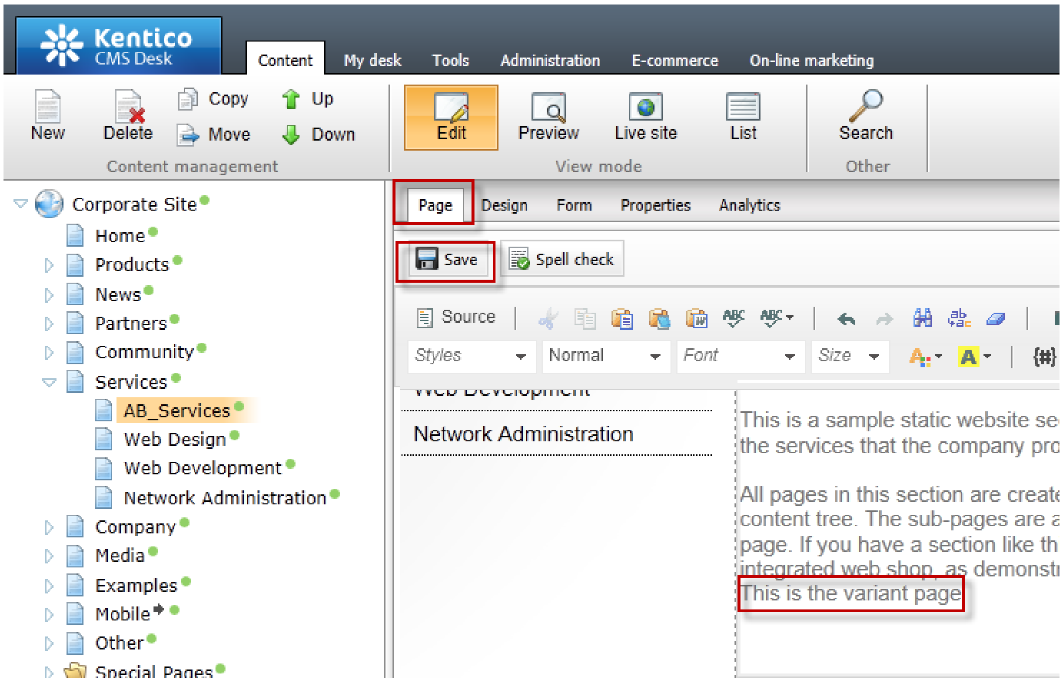
2. In the **New document** screen at the bottom select the **A/B test page variant** link as shown in the following screenshot.



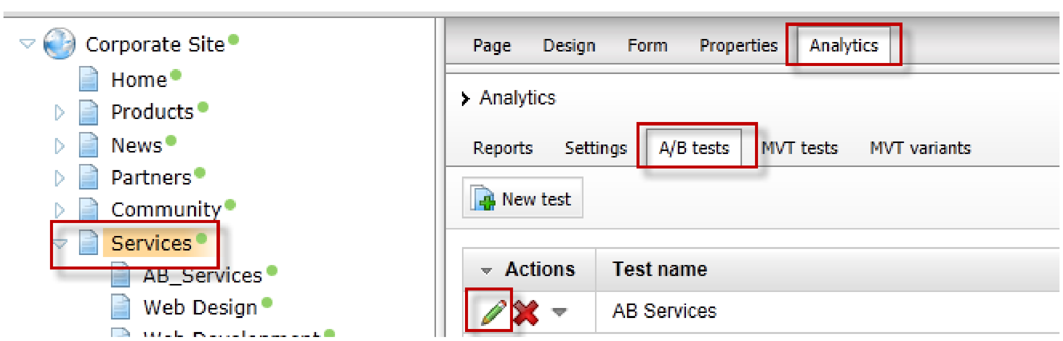
3. Update the following fields and then select the **Save** button.

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

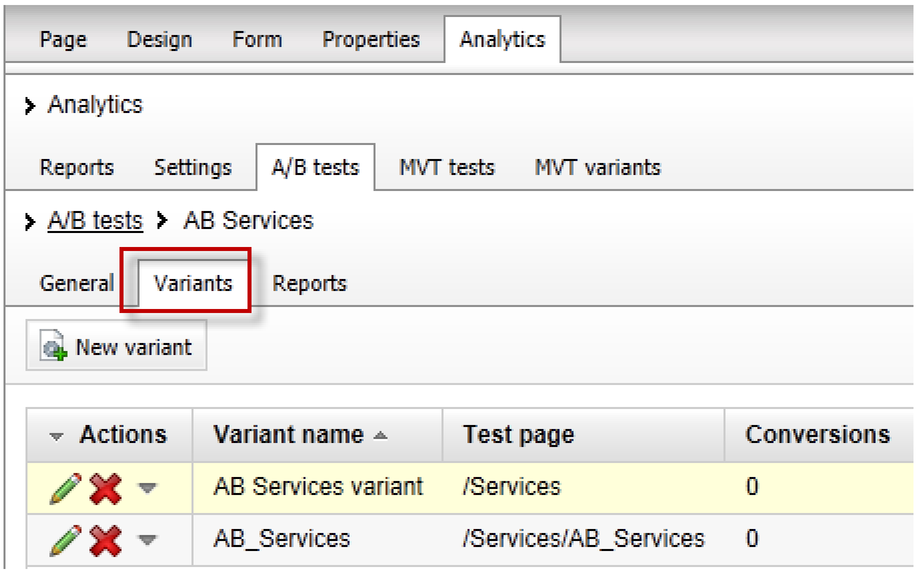
4. Select the **Page** tab in the Editable region add the text **This is the variant page** and then select the **Save** button as shown in the following screenshot.

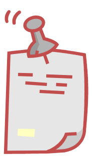


5. In the Content tree select the **Services** page, then select the **Analytics** tab, then the **A/B tests** tab and for the **AB Services** test click the **Edit (pencil)** icon as shown in the following screenshot.



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

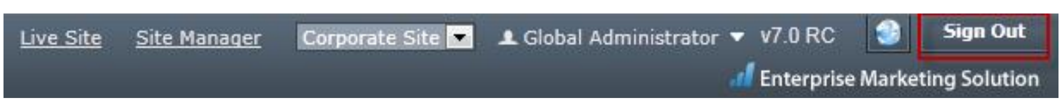




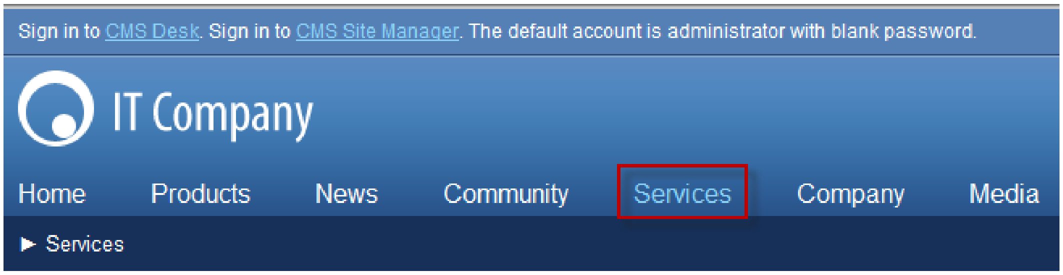
What is this?

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

7. In the upper right hand corner click the **Sign out** button as shown in the following screenshot.



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



It's random!

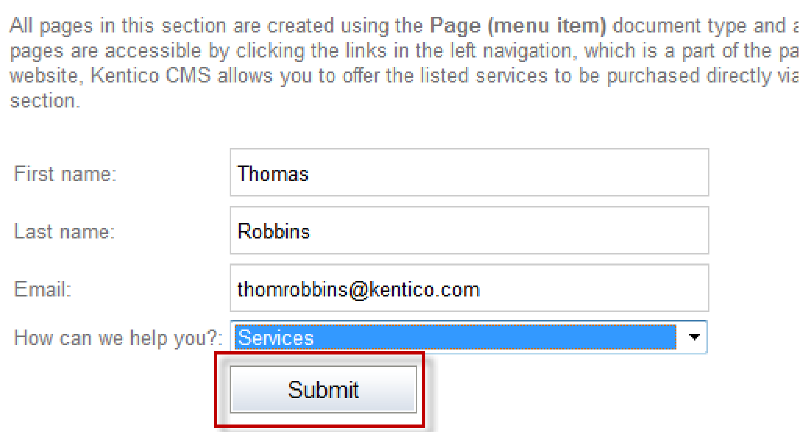
Remember the page received is random. Once you receive the Services page the cookie distributed to your machine will always open the same page. If you have a second browser available go ahead and try it!

Lab 4: Scoring contacts

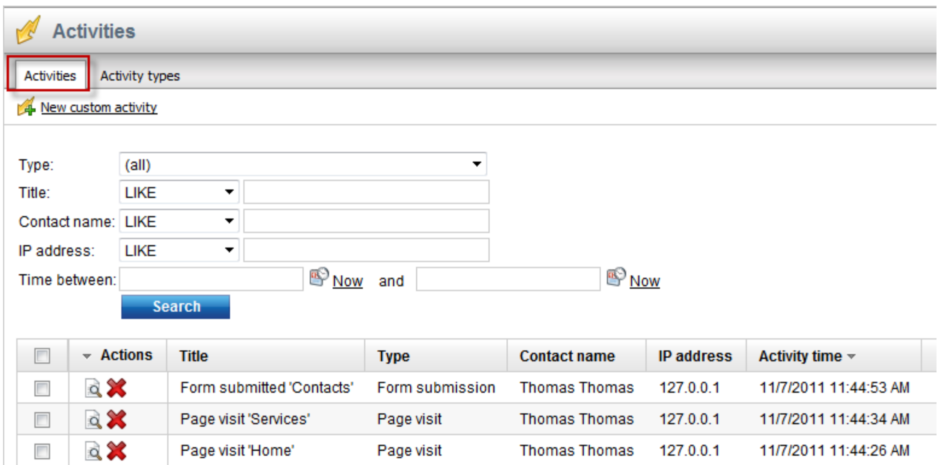
With the campaign running and proper demand generation our page will begin to receive site visits and contact form submissions. Once leads are collected they can be scored to show the weighting of their potential opportunities for our sales staff. In this lab we will enter our contact information and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

Lab 4-1: Creating the contact

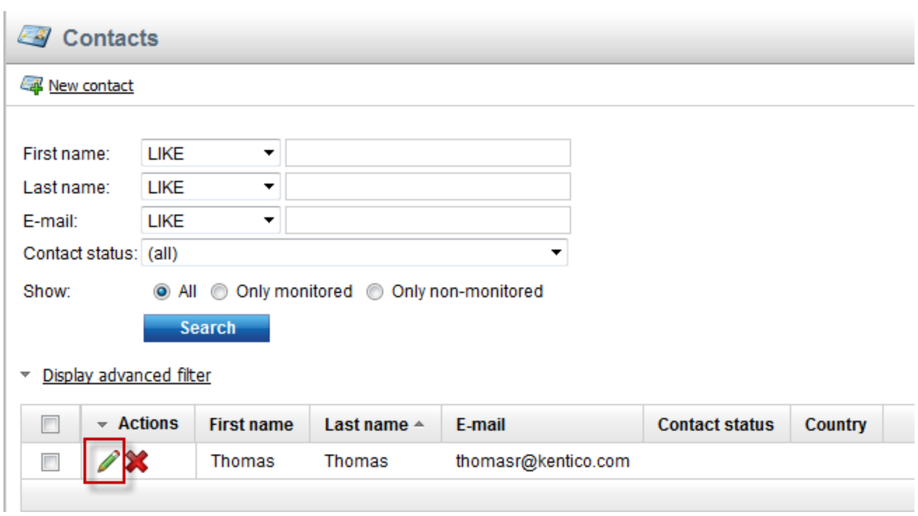
1. From the **Live site** select the **Services** page, in the **Contact form** enter your contact information and click the **Submit** button as shown in the following screenshot



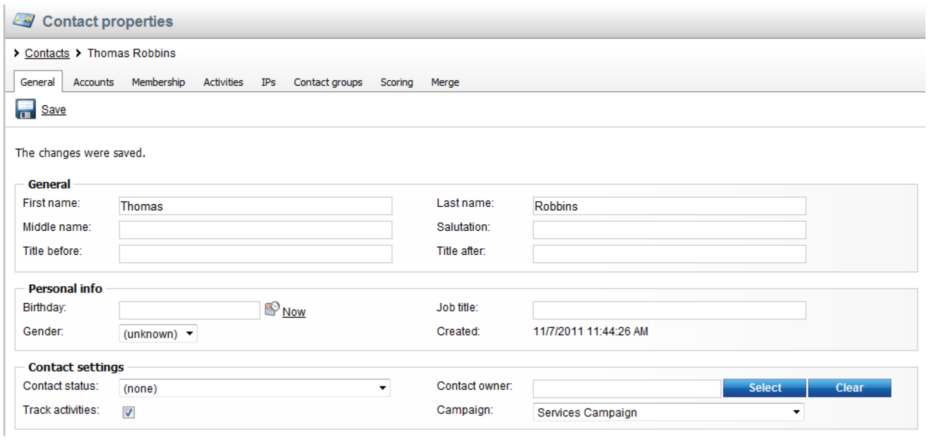
2. Log into **CMS Desk** as **Administrator** select the **On-line marketing** tab, click the **Activities** tab and validate that you see the form submission as shown in the following screenshot



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

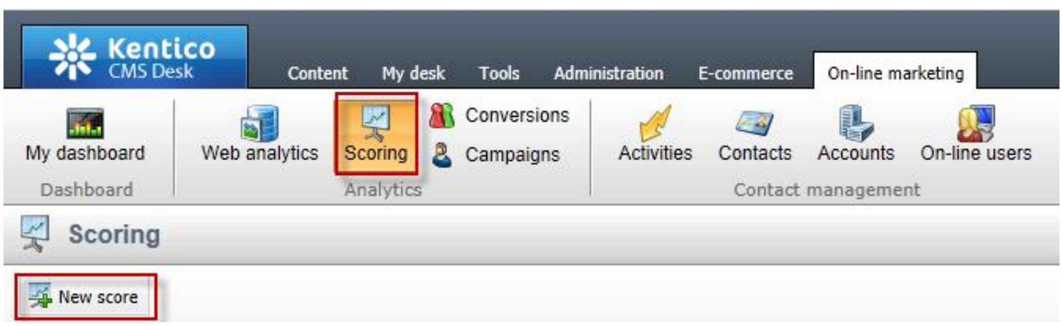


4. Validate that you see the **Contact properties** as shown in the following screenshot

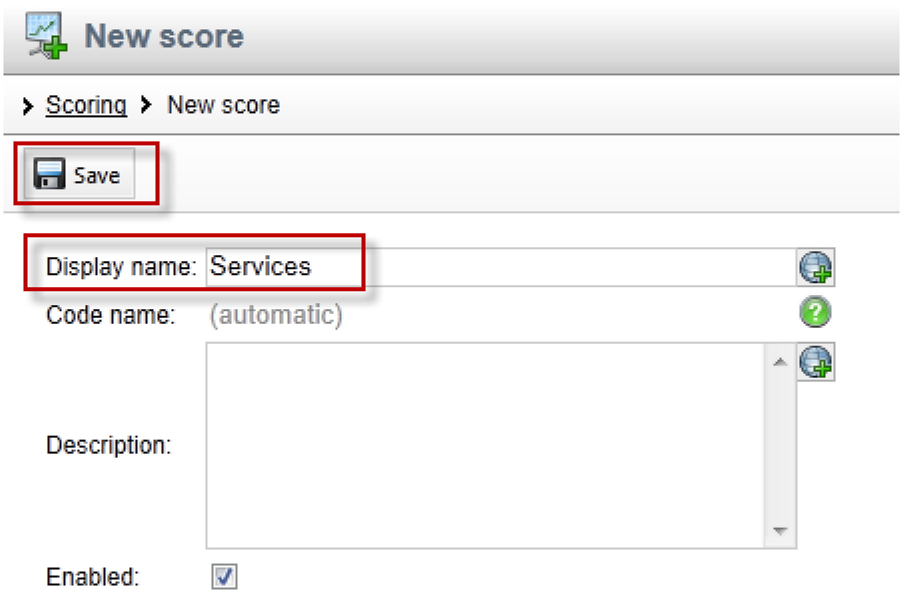


Lab 4-2: Creating the scoring rules

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

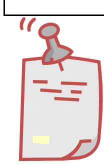


2. In the **New score** screen in the **Display name** field enter **Services** and then click the **Save** button as shown in the following screenshot.



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

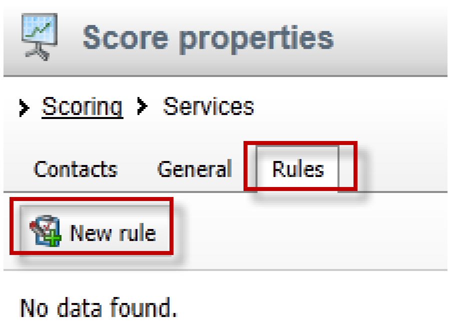
Field	Value
Send notification at score	**20**
Notification e-mail address	**Your email**



Why enter another score?

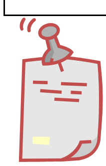
When a contact score reaches the value of 20, a notification email is automatically generated to the email address specified.

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



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

Field	Value
Display name	**Campaign contacts**
Value	**20**
Rule Type	**Activity**



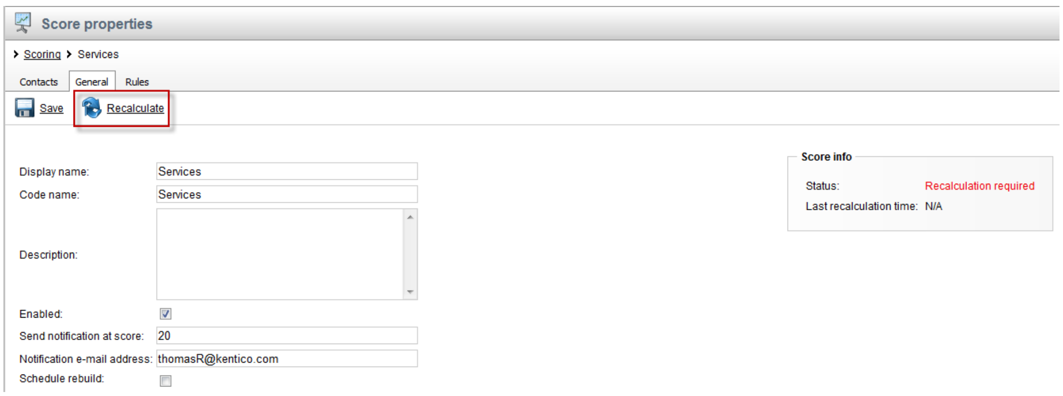
What is the rule type?

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.

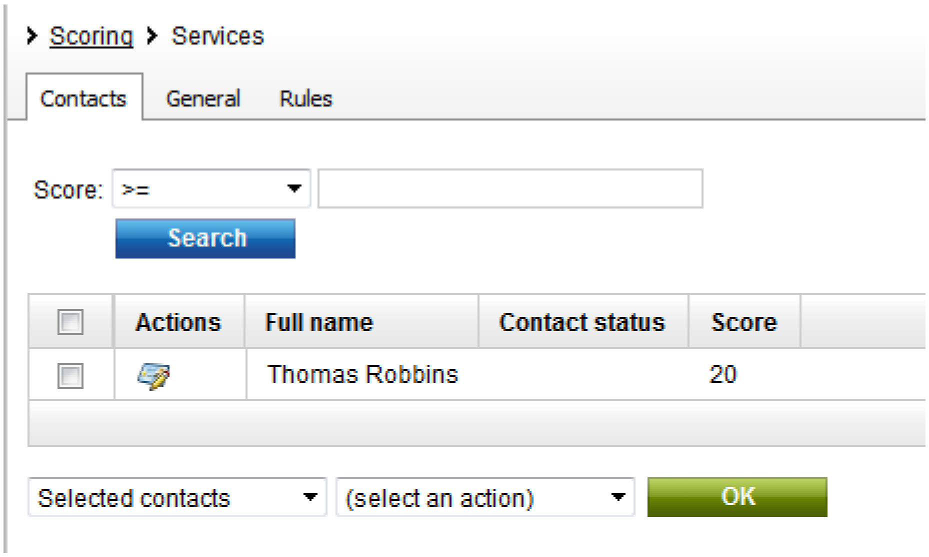
6. Update the following fields and then select the **Save** button.

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

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



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



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