

Kentico CMS Hands on Lab



Kentico CMS 7

Hands on Lab:
Kentico Enterprise Marketing Solution: Campaigns
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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

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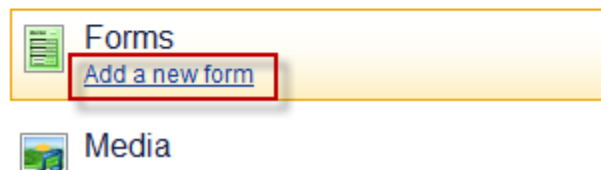
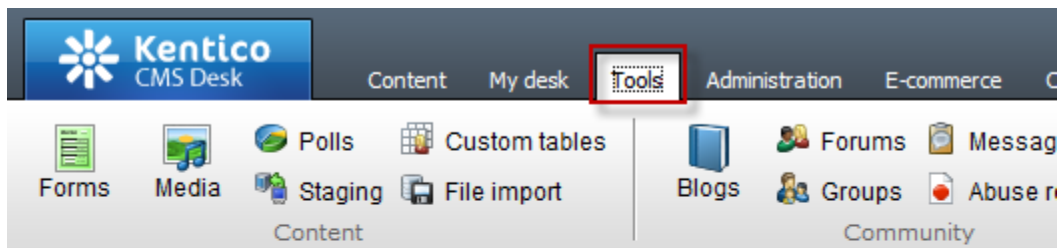
- Optimize a campaign using A/B tests

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.

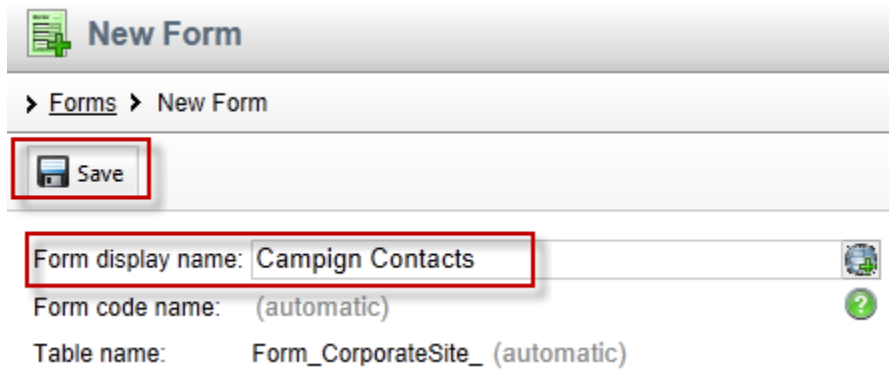
Lab 1-1: Creating an online form

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



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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.



New Form

> **Forms** > New Form

Save

Form display name: **Campaign Contacts**

Form code name: (automatic)

Table name: Form_CorporateSite_ (automatic)

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

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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

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

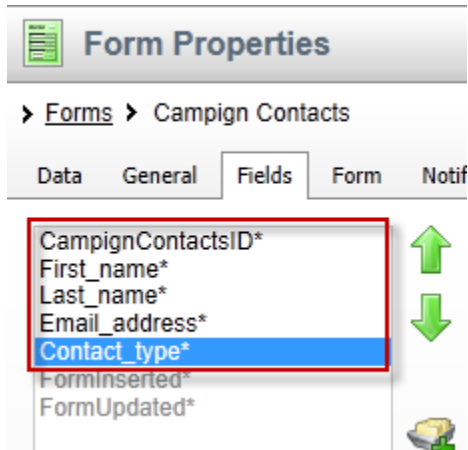
Section	Field	Value
Simple mode	Column name	Email_address
Simple mode	Field caption	Email
Simple mode	Field type	E-mail

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

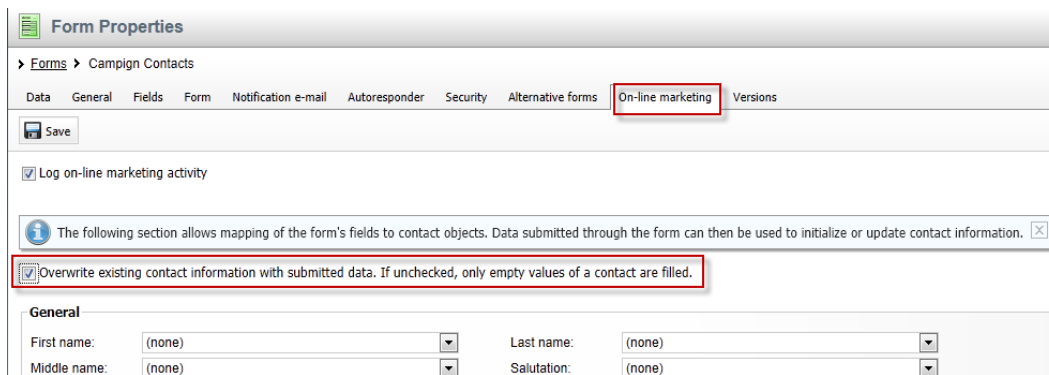
Section	Field	Value
Simple mode	Column name	Contact_type
Simple mode	Field caption	How can we help you?
Simple mode	Field type	Drop-down list
Editing control settings	Type	Options (one value; name pair on each line-example 1;Blue)
Editing control settings	Data source	Services;Services <CR> RFP; RFP

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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.



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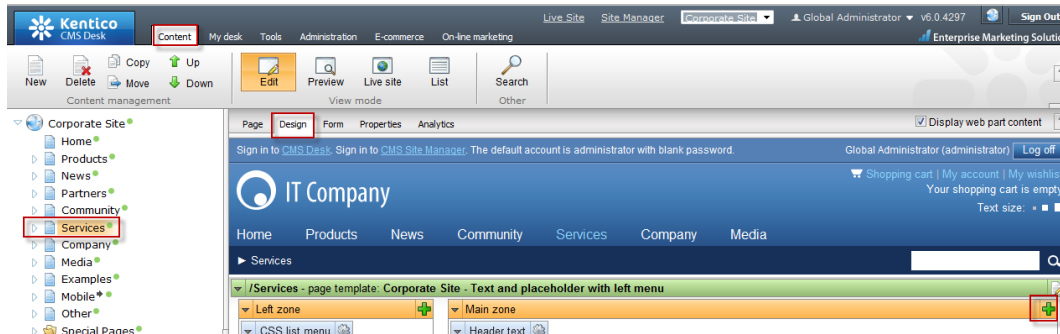
10. In the **On-line marketing** tab update the following fields and then click the **Save** button

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

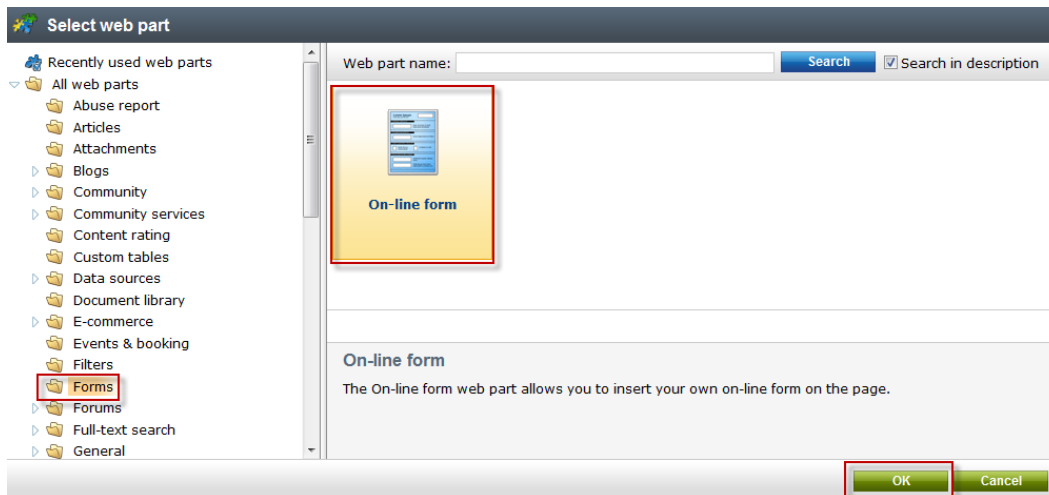
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Lab 1-2: Inserting the online form

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.

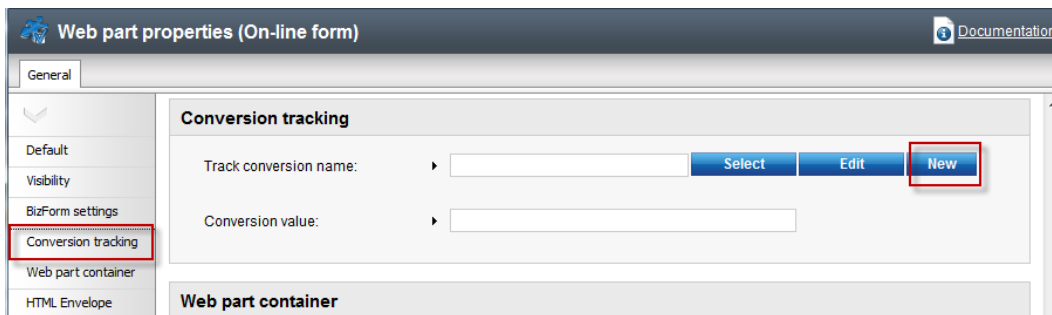


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3. In the **Web part properties (On-line form)** update the following value.

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.

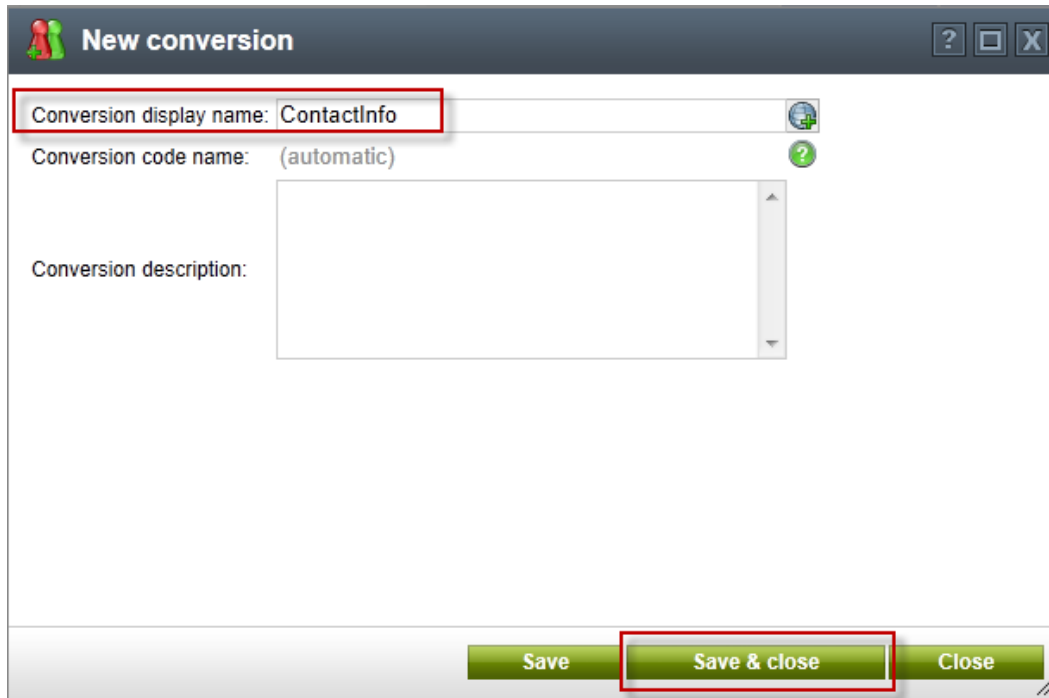


What is a conversion?

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.

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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.



The screenshot shows the 'New conversion' dialog box. The 'Conversion display name' field contains the text 'ContactInfo'. The 'Conversion code name' is set to '(automatic)'. The 'Conversion description' field is empty. At the bottom of the dialog, there are three buttons: 'Save', 'Save & close', and 'Close'. The 'Save & close' button is highlighted with a red box.

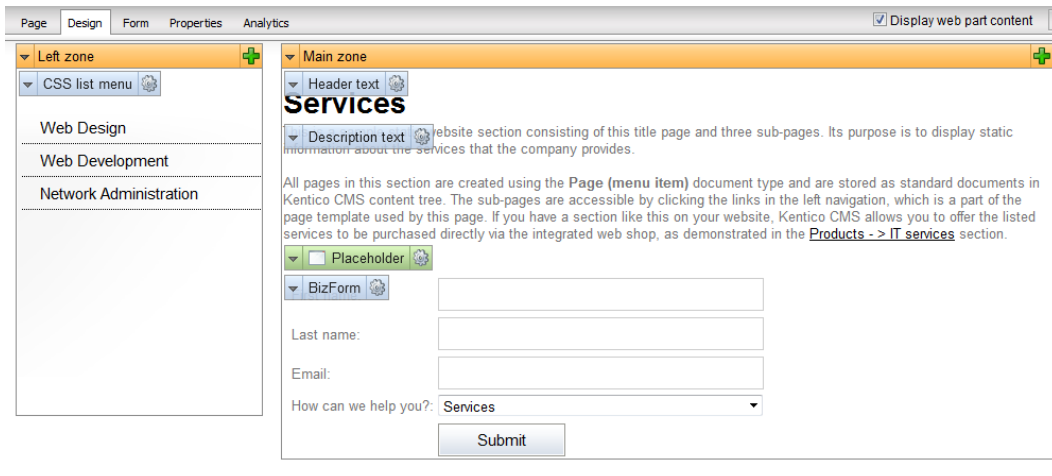
6. In the **Web part properties (On-line form)** screen in the **Conversion value** field enter **20** and then select **Ok** as shown in the following screenshot.



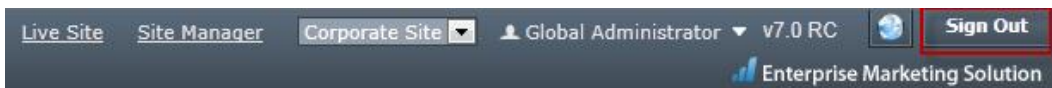
The screenshot shows the 'Web part properties (On-line form)' dialog box. The 'Conversion tracking' section is active. The 'Track conversion name' field is set to 'ContactInfo'. The 'Conversion value' field is set to '20'. At the bottom of the dialog, there are three buttons: 'OK', 'Cancel', and 'Apply'. The 'OK' button is highlighted with a red box.

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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.

First name:

Last name:

Email:

How can we help you?:

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

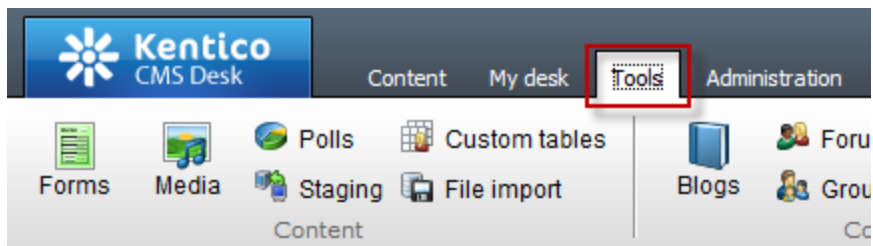
Services

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.

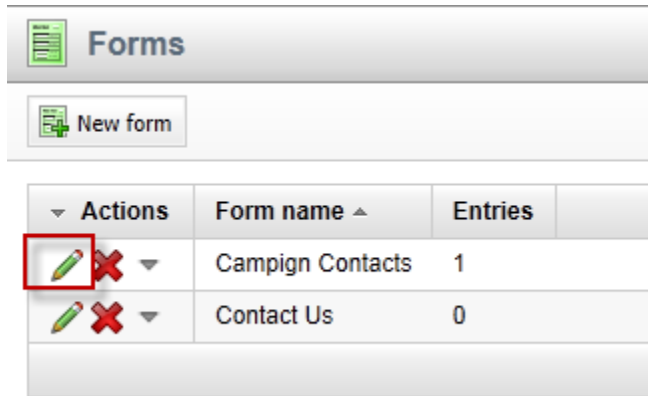
We will contact you shortly!





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



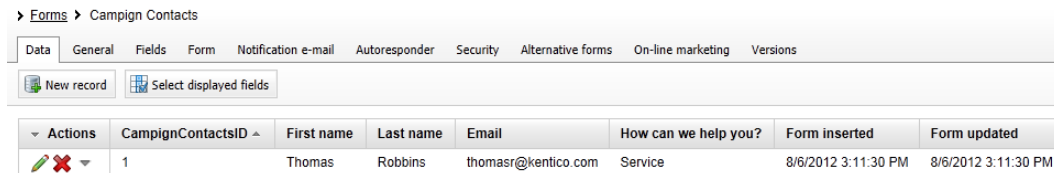
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12. In the **Forms** screen select the **Edit icon (pencil)** for **Campaign Contacts** as shown in the following screenshot.





Actions	Form name ^	Entries
 	Campaign Contacts	1
 	Contact Us	0



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



> Forms > Campaign Contacts

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

 New record  Select displayed fields

Actions	CampaignContactsID ^	First name	Last name	Email	How can we help you?	Form inserted	Form updated
 	1	Thomas	Robbins	thomasr@kentico.com	Service	8/6/2012 3:11:30 PM	8/6/2012 3:11:30 PM

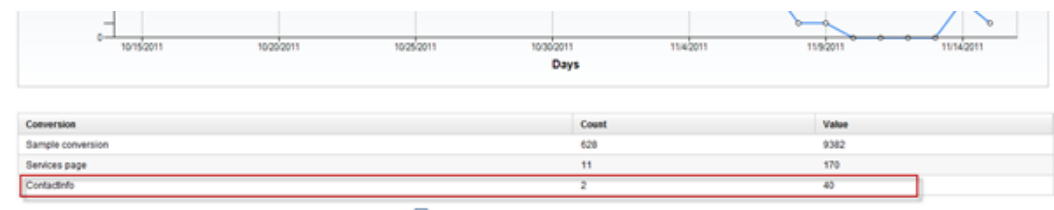
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- Click the **On-line marketing** tab, then select the **Web analytics** button, in the **Web analytics** list expand **Campaigns & conversion**, then expand **Conversions** and select **Overview** as shown in the following screenshot.

The screenshot shows the Kentico CMS interface. The top navigation bar includes 'Content', 'My desk', 'Tools', 'Administration', 'E-commerce', and 'On-line marketing' (highlighted with a red box). Below this, there are icons for 'My dashboard', 'Web analytics', 'Scoring', 'Campaigns', 'Activities', 'Contacts', 'Accounts', and 'On-line us'. The 'Web analytics' section is expanded, showing a tree view with 'Web analytics' (highlighted), 'Dashboard', 'Visitors', 'Traffic sources', 'Content', 'Campaigns & conversions' (highlighted), 'Campaigns', 'Conversions' (highlighted), 'Overview' (highlighted), 'Conversion details', 'Browser capabilities', and 'Optimization'. The main content area displays the 'Conversions - Overview' report, which includes a 'Report' tab, 'Conversions' sub-tab, and buttons for 'Save', 'Print', 'Delete data', and 'Subscribe'. The report shows a 'Goal' of 'Conversions count' and a 'Conversion' of '(all)'. Below the report, there is a table with the following data:

Conversion	Count	Value
Sample conversion	528	9382
Services page	11	170
ContactInfo	2	40

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



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.

The screenshot displays the Kentico CMS interface for creating a document campaign. At the top, a navigation bar includes tabs for 'Page', 'Design', 'Form', 'Properties', and 'Analytics', with 'Analytics' highlighted. Below this, a sub-menu for 'Analytics' contains 'Reports', 'Settings', 'A/B tests', 'MVT tests', and 'MVT variants', with 'Settings' highlighted. A 'Save' button is visible below the sub-menu. The main content area features three rows of input fields and buttons:

Track campaign:	<input type="text"/>	Select	Edit	New
Track conversion name:	<input type="text"/>	Select	Edit	New
Conversion value:	<input type="text"/>			

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

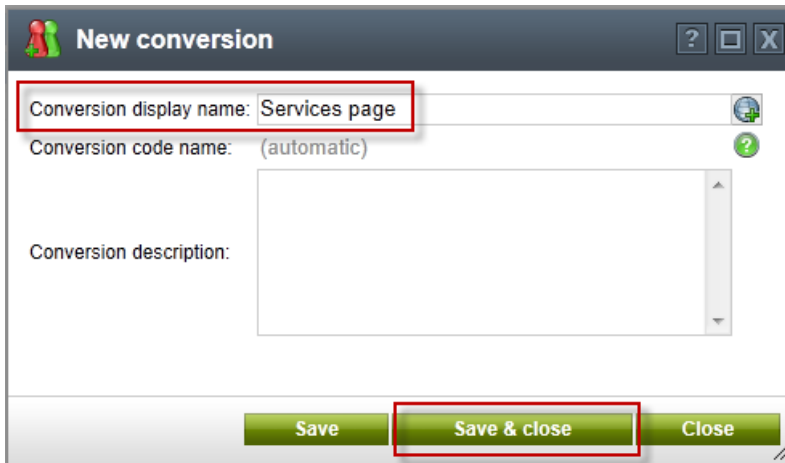
Section	Field	Property
Campaign basic settings	Campaign display name	Services campaign
Campaign basic settings	Open from	Now
Campaign basic settings	Open to	Now + 2 weeks
Advanced campaign settings	Campaign impressions	20000
Advanced campaign settings	Total cost	10000

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

The screenshot shows the 'Analytics' section with tabs for Reports, Settings, A/B tests, MVT tests, and MVT variants. A 'Save' button is visible. Below, the 'Track campaign' field is set to 'Services_campaign' with 'Select', 'Edit', and 'New' buttons. The 'Track conversion name' field is empty with 'Select', 'Edit', and 'New' buttons. The 'Conversion value' field is empty. The 'New' button for 'Track conversion name' is highlighted with a red box.

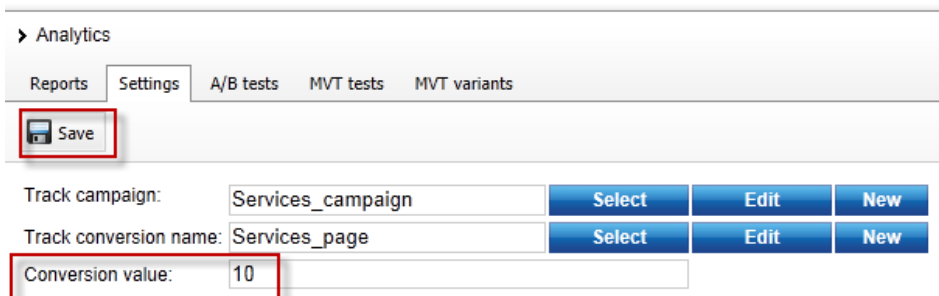
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- In the **New conversion** dialog in the **Conversion display name** field enter **Services page** and then select **Save & close** as shown in the following screenshot.



The screenshot shows a dialog box titled "New conversion". It has three input fields: "Conversion display name" (containing "Services page"), "Conversion code name" (containing "(automatic)"), and "Conversion description" (empty). At the bottom, there are three buttons: "Save", "Save & close", and "Close". The "Save & close" button is highlighted with a red box.

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



The screenshot shows the "Analytics" settings page. It has a "Save" button highlighted with a red box. Below it, there are two rows of settings: "Track campaign: Services_campaign" and "Track conversion name: Services_page". Each row has "Select", "Edit", and "New" buttons. The "Conversion value" field is highlighted with a red box and contains the value "10".

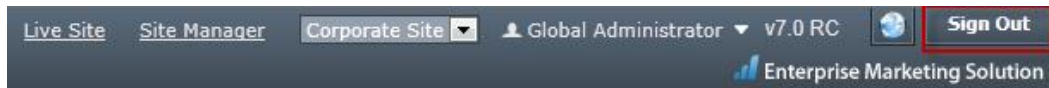


Why another conversion?

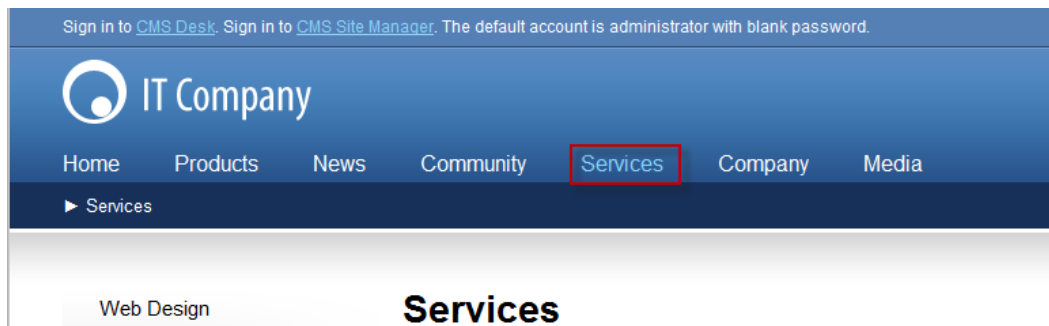
The Services page campaign includes two tracked conversions. The first we created earlier with the online form. The Service page conversion tracks the traffic to the Services page.

Lab 2-2: Creating Campaign Data

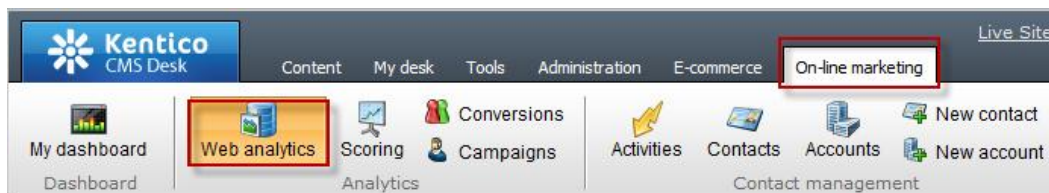
1. In the upper right hand corner click the **Sign out** button as shown in the following screenshot.



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

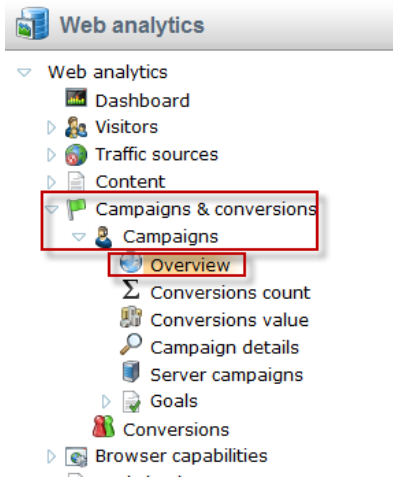


3. Log into **CMS Desk**, select the **On-line marketing** tab, and then the **Web analytics** button as shown in the following screenshot.

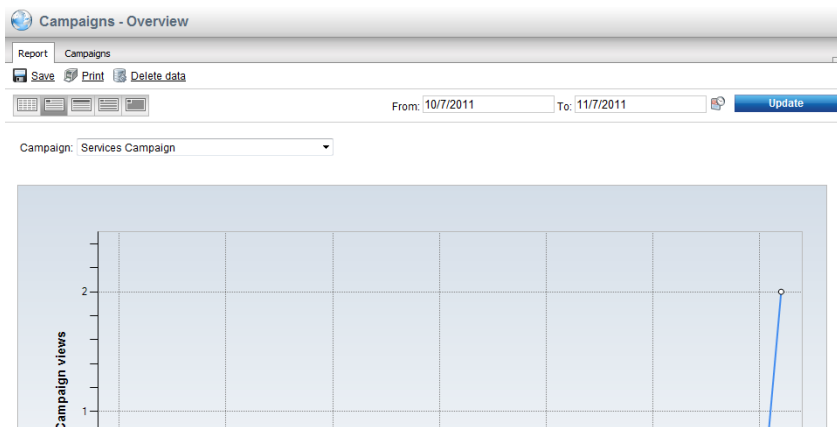


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4. In the **Web analytics** list expand **Campaigns & conversion**, then expand **Campaigns** and then select the **Overview** report as shown in the following screenshot.

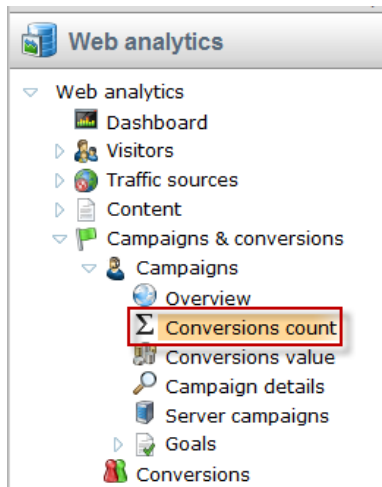


5. In the **Campaign** drop down select the **Services campaign** and validate that you see a report similar to the following screenshot.

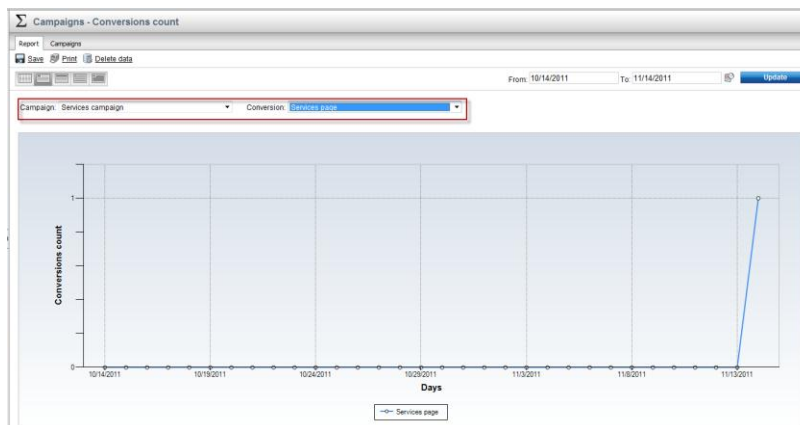


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6. Select the **Conversion count** report as shown in the following screenshot.



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.

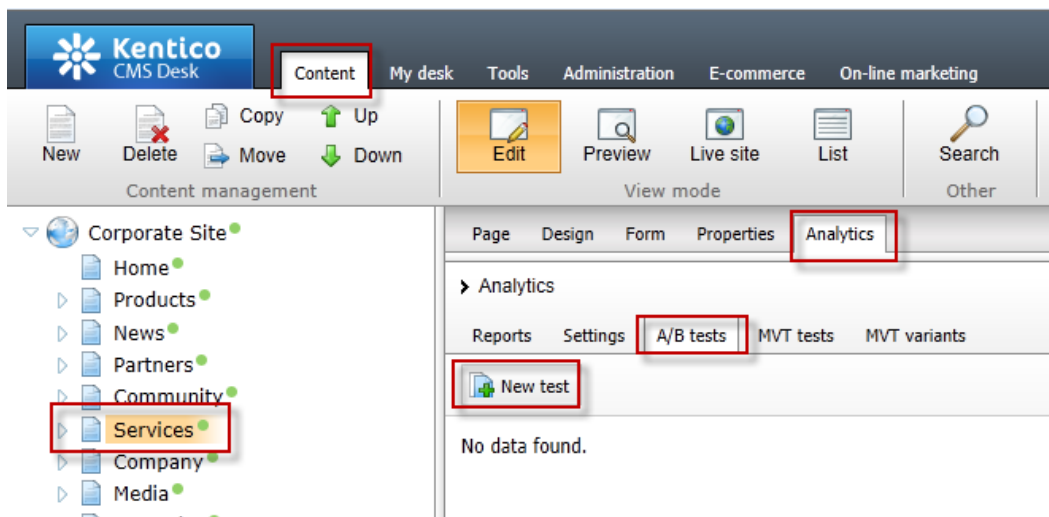


What's the difference between A/B and MVT Testing?

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

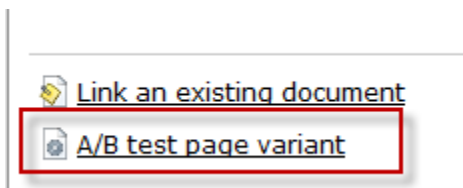
Field	Value
Display name	AB Services
Target number of conversions	100
Test from	Now
Test to	Now + 2 weeks
Test enabled	Checked

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.

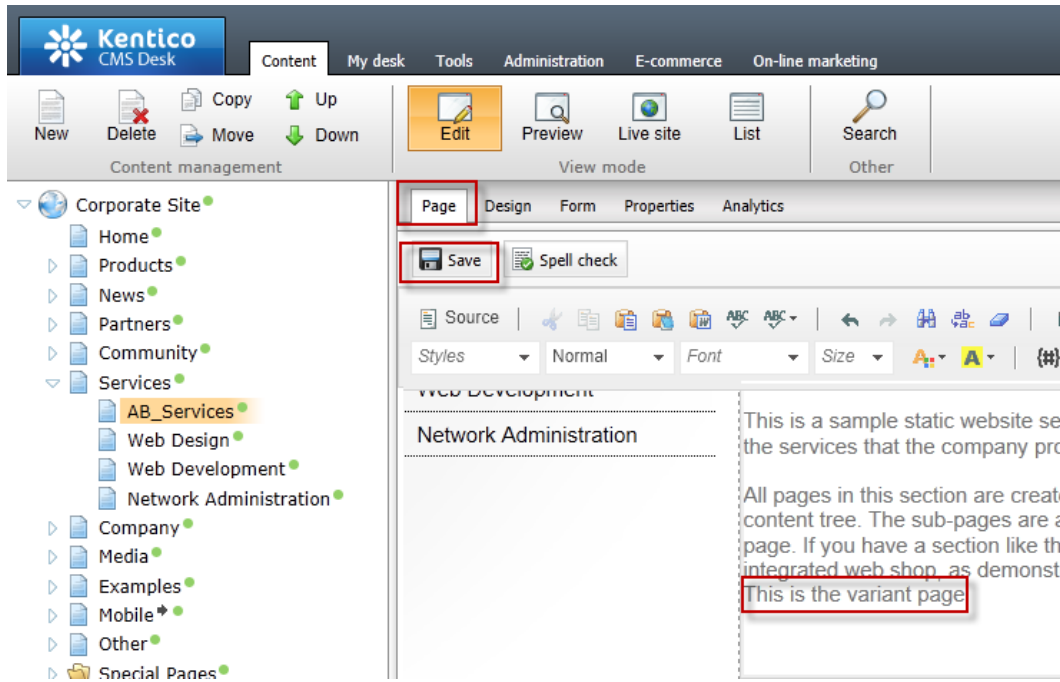


3. Update the following fields and then select the **Save** button.

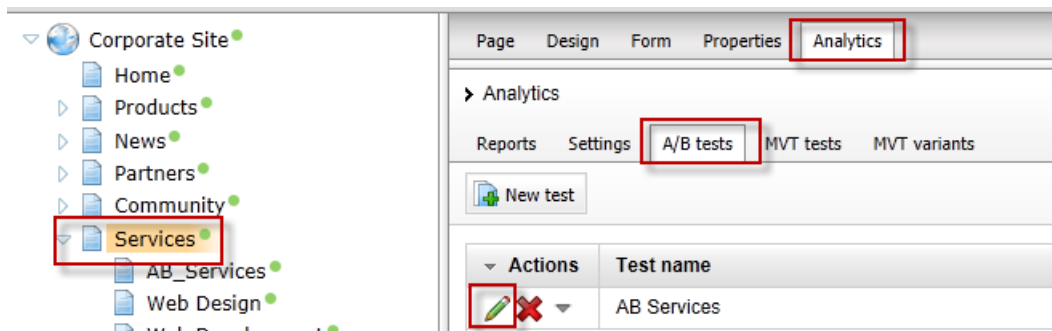
Field	Value
Document name	AB_Services
Assign to A/B test	AB Services

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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.

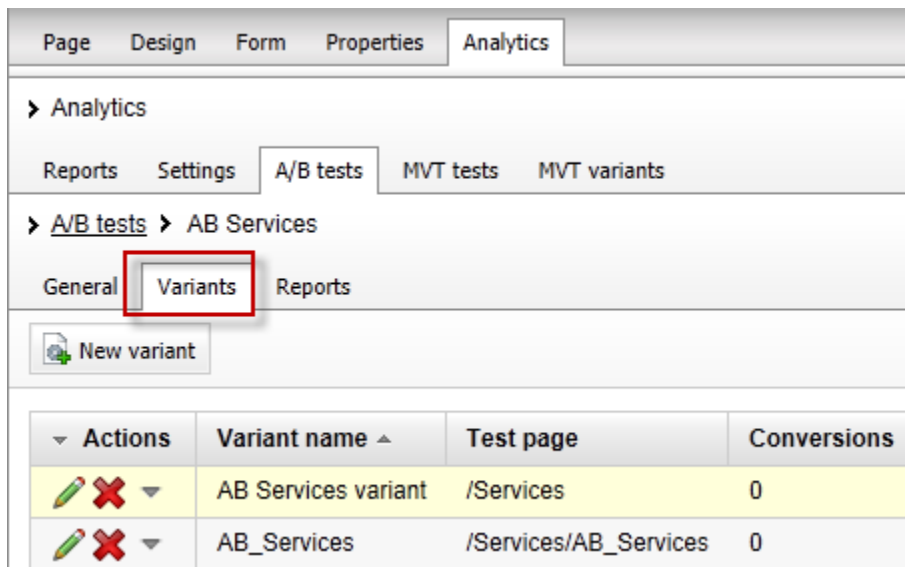


5. In the Content tree select the **Services** page, then select the **Analytics** tab, then the **A/B tests** tab and for the **AB Services** test click the **Edit (pencil)** icon as shown in the following screenshot.







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



The screenshot shows the Kentico CMS interface with the 'Analytics' tab selected. Under 'Analytics', the 'A/B tests' sub-tab is active. Within 'A/B tests', the 'AB Services' section is open, and the 'Variants' sub-tab is highlighted with a red box. Below the tabs, there is a 'New variant' button. A table displays the current variants for the 'AB Services' test:

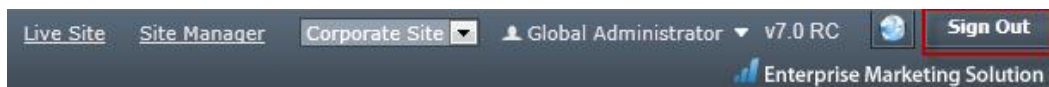
Actions	Variant name	Test page	Conversions
 	AB Services variant	/Services	0
 	AB_Services	/Services/AB_Services	0



What is this?

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

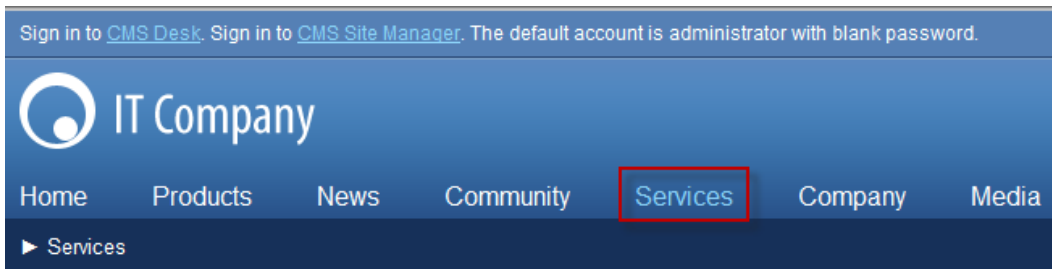
7. In the upper right hand corner click the **Sign out** button as shown in the following screenshot.



The screenshot shows the footer of the Kentico CMS interface. The 'Sign Out' button is highlighted with a red box. Other elements in the footer include 'Live Site', 'Site Manager', 'Corporate Site' (dropdown), 'Global Administrator' (dropdown), 'v7.0 RC', and '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

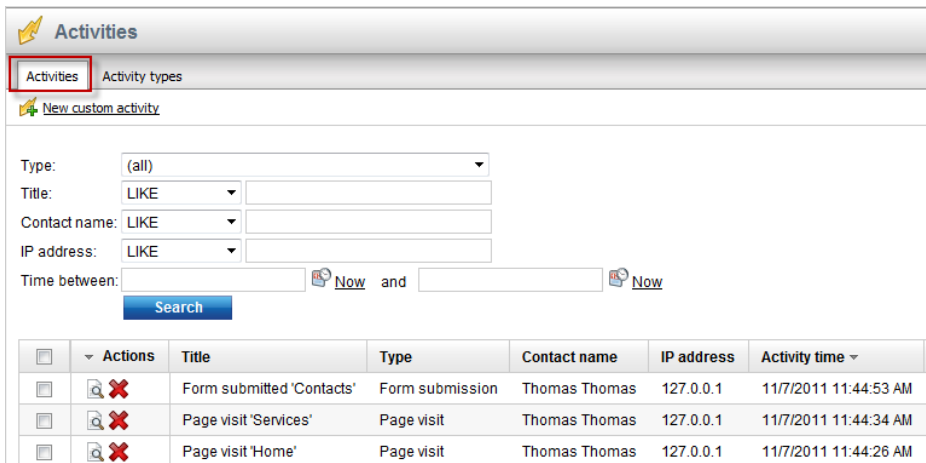
1. From the **Live site** select the **Services** page, in the **Contact form** enter your contact information and click the **Submit** button as shown in the following screenshot

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:	<input type="text" value="Thomas"/>
Last name:	<input type="text" value="Robbins"/>
Email:	<input type="text" value="thomrobbins@kentico.com"/>
How can we help you?:	<input type="text" value="Services"/>
	<input type="button" value="Submit"/>

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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



Activities Activity types

[New custom activity](#)

Type: (all)

Title: LIKE

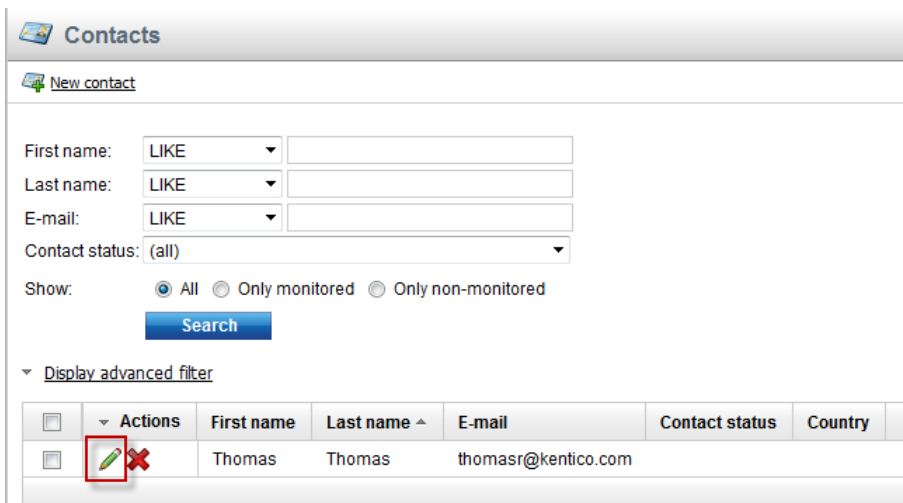
Contact name: LIKE

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

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

Display advanced filter

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

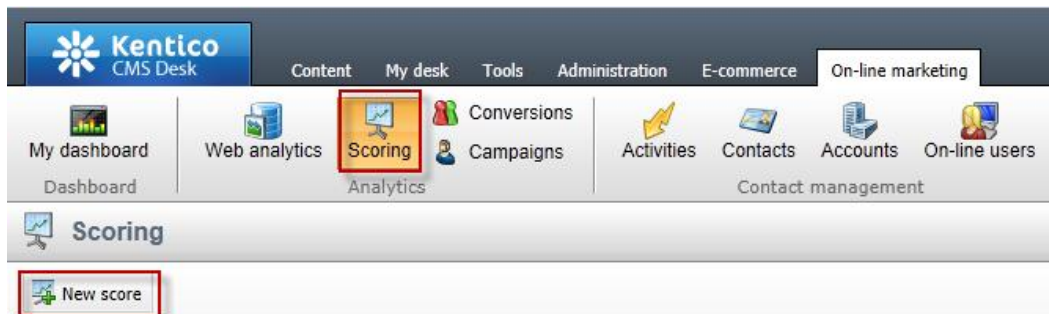
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4. Validate that you see the **Contact properties** as shown in the following screenshot

The screenshot shows the 'Contact properties' form for a contact named Thomas Robbins. The form is divided into several sections: General, Personal info, and Contact settings. The General section includes fields for First name (Thomas), Middle name, Title before, Last name (Robbins), Salutation, and Title after. The Personal info section includes Birthday (with a 'Now' button), Gender (unknown), Job title, and Created (11/7/2011 11:44:26 AM). The Contact settings section includes Contact status (none), Track activities (checked), Contact owner (with Select and Clear buttons), and Campaign (Services Campaign).

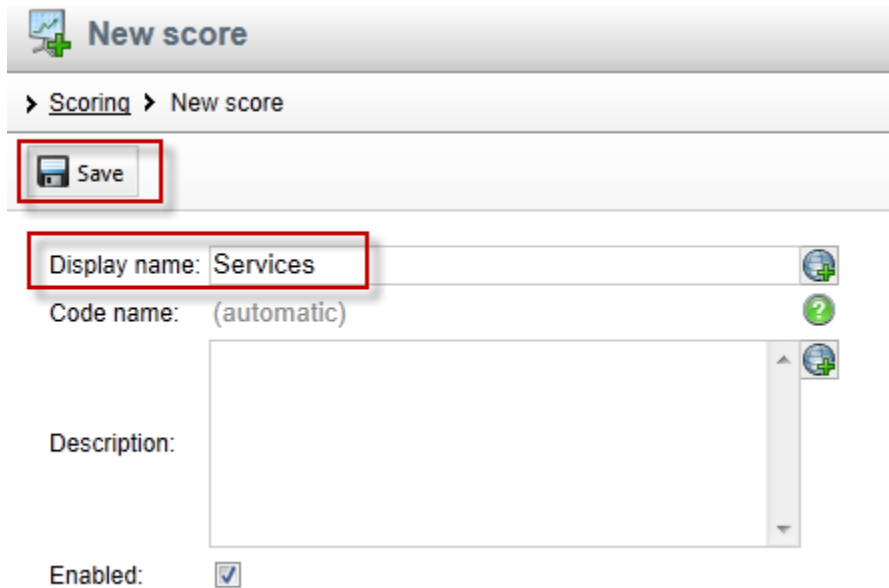
Lab 4-2: Creating the scoring rules

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



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



New score

> Scoring > New score

Save

Display name: **Services**

Code name: (automatic)

Description:

Enabled:

- 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

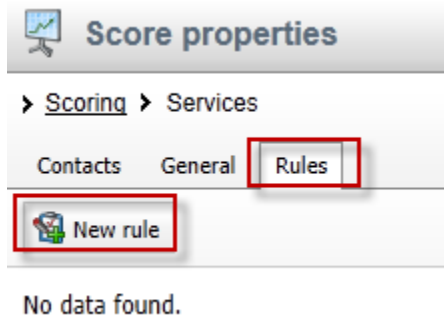


Why enter another score?

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

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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.

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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

The screenshot shows the 'Score properties' configuration page for a rule named 'Services'. The 'General' tab is active, and the 'Recalculate' button is highlighted with a red box. The 'Score info' panel on the right indicates that a recalculation is required.

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

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- 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>