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EPiServer Connect for Marketing Automation

Commercial information Note that this add-on requires a commercial license to be allowed to run in production environments.

EPiServer Connect for Marketing Automation is an add-on in EPiServer for automating marketing across the customer lifecycle.

Combining marketing automation and web content management, EPiServer Connect for Marketing Automation and EPiServer help marketers effectively manage their online presence and deliver timely, relevant content to their target audience across every channel and device.

You can customize your content to provide a continuous customer experience throughout marketing programs and nurture campaign participation based on the customer's score. This allows to create targeted content and provide a personalized experience of potential as well as existing customers. It is also possible for content to evolve and adapt based on visitor interactions and activity.

EPiServer Connect for Marketing Automation supports integration of Silverpop Engage™ and Marketo™ marketing softwares (Silverpop Engage is a trademark of IBM, and Marketo of Marketo).

Functional overview

A typical process begins when a potential customer visits a landing page on the website, offering the visitor to subscribe to a newsletter. The visitor navigates the website and eventually submits the form with some information, for example, opts in for the newsletter.

Using **progressing profiling**, an e-mail is sent to the e-mail address that was submitted by the visitor based on automation rules in place (to welcome and thank the visitor for signing up), and at the same time to book a demo. The potential customer receives the e-mail and selects a link within it, for example, book a demo, generating traffic back to the EPiServer-based website.

If the potential customer books the demo through a form, then the marketer can customize and personalize the content further to provide a continuous customer experience, dynamically updating the content based on each individual's score.

Information populated in the form and other data regarding their behaviors and actions on the website is sent over to the database, in which programs and scoring models can be used to set up rules that rank and categorize leads for the purpose of lead nurturing and e-mail automation (based on behaviors, actions, profile information etc).

The integration allows the same program and scoring model information to be leveraged when building business rules for delivering targeted content via EPiServer's personalization feature. When additional e-mails are sent and visitors come back to the site, perhaps on a mobile or tablet device this time, the visitor sees one-to-one targeted content most relevant to them.

Behavioral data is updated over time to provide a complete view of the visitor's interactions. Various information can be optionally saved to a CRM system for use by sales teams.

Work procedure

The basic workflow to personalize content with the EPiServer Connect for Marketing Automation add-on is done in the following steps:

1. The system administrator creates visitor groups with criteria to match different market segments as described in *Administering visitor groups*.
2. The marketer creates content on landing pages in EPiServer to be tracked in EPiServer Connect for Marketing Automation. Creates forms in EPiServer to gather visitor information in the database and creates mailings in EPiServer (the template is replicated in the database upon publish).
3. The marketer personalizes content on the website for publication, such as forms and editorial texts as blocks, images etc as described in *Personalizing content*.
4. The marketer drives traffic to the website through e-mails created in EPiServer and then leveraged in EPiServer Connect for Marketing Automation.
5. The marketer builds segmentation rules and target content based on single combined view of customer. The marketer creates and activates a program in EPiServer Connect for Marketing Automation.
6. The marketer monitors the program through EPiServer Connect for Marketing Automation, and do further customization on the website content, creates an e-mail marketing campaign and so on.

Content of the add-on

The following content is included in the add-on installation:

- Connection to Silverpop Engage or Marketo within EPiServer. Tracking scripts send behavioral data to the database.
- A set of **visitor group criteria** to create adaptive content on your website through EPiServer, based on the demographic or behavioral data for customers available within the database. Display content that dynamically changes on your website depending on the matching visitor group.
- Silverpop Engage comes with a **mailing template** to create personalized newsletters and e-mail marketing for outbound communication through EPiServer. Send mailings with content that is adapted to suit the interests of the matching visitor group and score.

Managing content in Silverpop Engage

This document describes how to adapt the content on your website and to work with e-mail marketing using the **EPiServer Connect for Marketing Automation** add-on for Silverpop Engage. Here you can also find out how to create visitor groups.

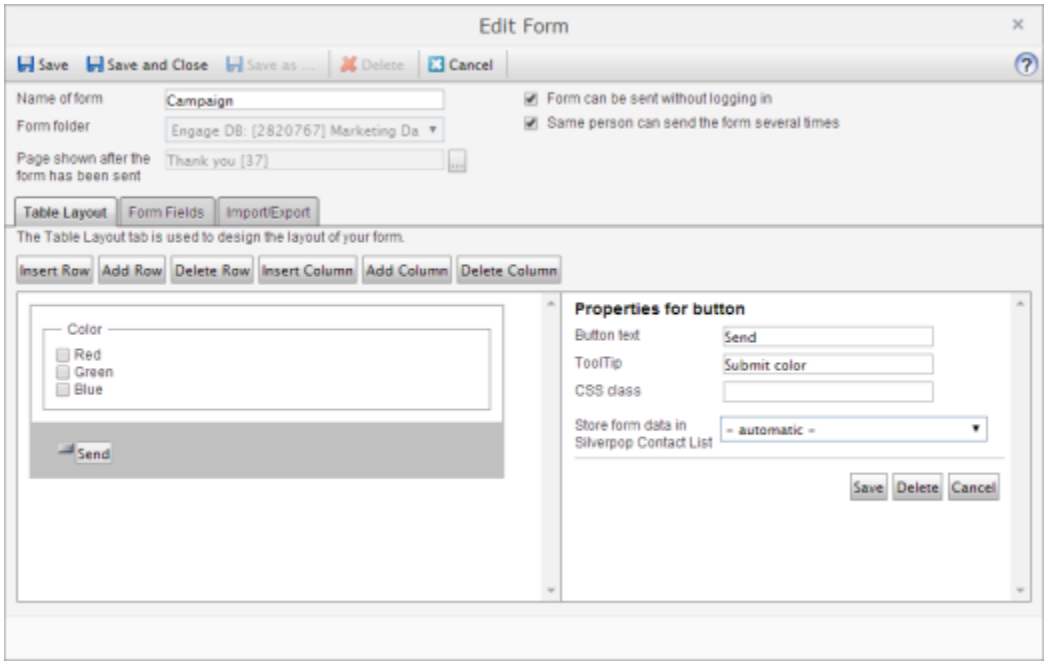
To be able to use this feature, your system administrator must install the add-on, see *Administering add-ons*.

Managing website content

It is possible to personalize web content for visitors with data from Silverpop Engage, applied to blocks, pages or dynamic content. This can be done by creating visitor groups in EPiServer using criteria from the Silverpop Engage database.

Creating a form

To be able to proceed this step the EPiServer website must be connected Silverpop Engage.



Create a form in EPiServer and connect it to Silverpop Engage as follows:

1. In **Folder:/Engage DB**, select a database of Silverpop Engage, for example, **Marketing Database** with support for anonymous visitors.
2. Create the form in EPiServer, for example, name it “Campaign”. You might want to select **Form can be sent without logging in** and **Same person can send the form several times**. (The form can be created either in a page type or a block type containing the form property.)

3. Add the form fields, such as a text box and map them to each Silverpop Engage field. In this example, the check boxes with color options are mapped to the “Favorite Color” field in Silverpop Engage.
4. Add the **Submit** button, and then select which of the following ways you want to store contact lists of visitors who submitted the form:
    - **Automatic** will automatically generate a new contact list in Silverpop Engage’s database. The name of the contact list will be based on the form name.
    - **None** will not add any new contacts in the database or contact list.
    - **[Selected contact list]** will add a new contact list in the selected contact list.
5. Drag the form block to the page used in your campaign or program, and publish it at the appropriate time.
6. Go to Silverpop Engage > **Home** > **Data** > **View Data** > **Marketing Database (Supports Anonymous)** > **Contact Lists** tab. If you have selected “automatic” sending of the form earlier, you will see the “Campaign” contact list added in the database. Select the contact list to see all contacts of visitors who submitted the form.

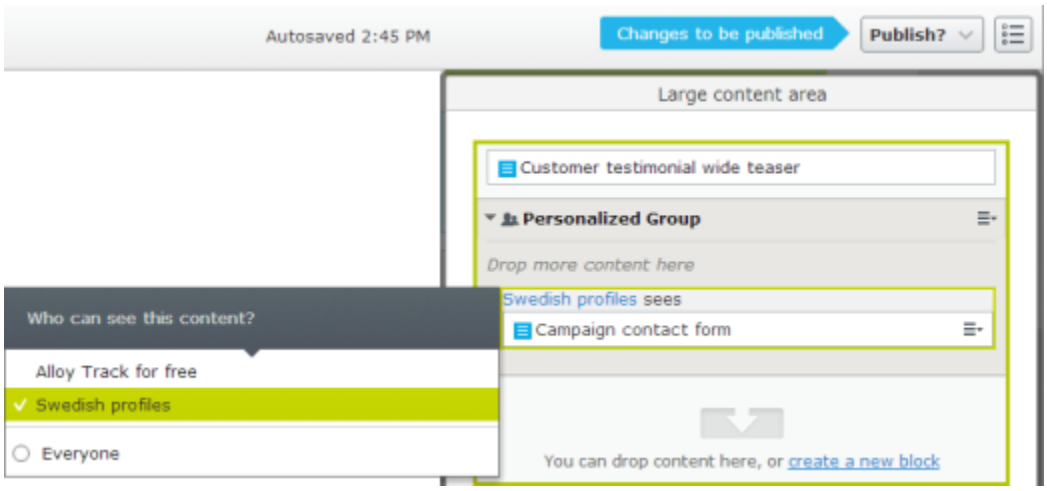
A “contact” can be a recipient in several Silverpop Engage databases.

Personalization using a block

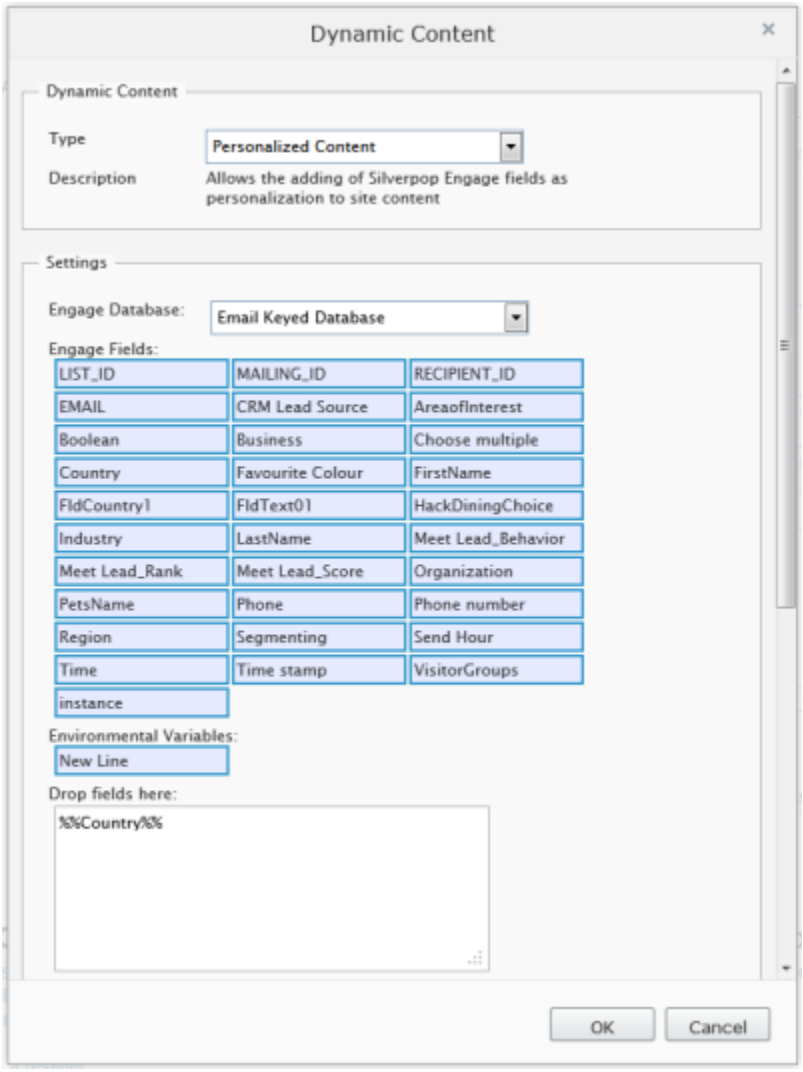
Personalize the block as described in *Personalizing content*. Connect the block to any of the existing visitor groups in edit view.

If it is a form block, add the form you have created and connected to Silverpop Engage.

In this example associated content displays on a page when the visitor match the “Swedish profiles” criteria.



Personalization using dynamic content



The fields used here are created in Silverpop Engage. Personalize using dynamic content as follows:

1. Create or edit a page in EPiServer CMS.
2. Add a piece of existing *dynamic content* in rich-text editor area of the page.
3. Select to edit the dynamic content. In **Type**, select **Personalized Content**.
4. Select a form. In **Folder:/Engage DB**, select a database of Silverpop Engage, for example, **Marketing Database** with support for anonymous visitors.
5. Drag a field into **Drop fields here** area, for example “Country”.
6. Select **Environmental Variables** to insert a new line.
7. Click **OK** to insert the dynamic content to the rich-text editor.
8. Save your changes.

Creating a mailing

The Silverpop Engage add-on lets you create or edit an e-mail template within EPiServer. Any changes to this template will automatically be replicated to the associated template in Silverpop Engage.

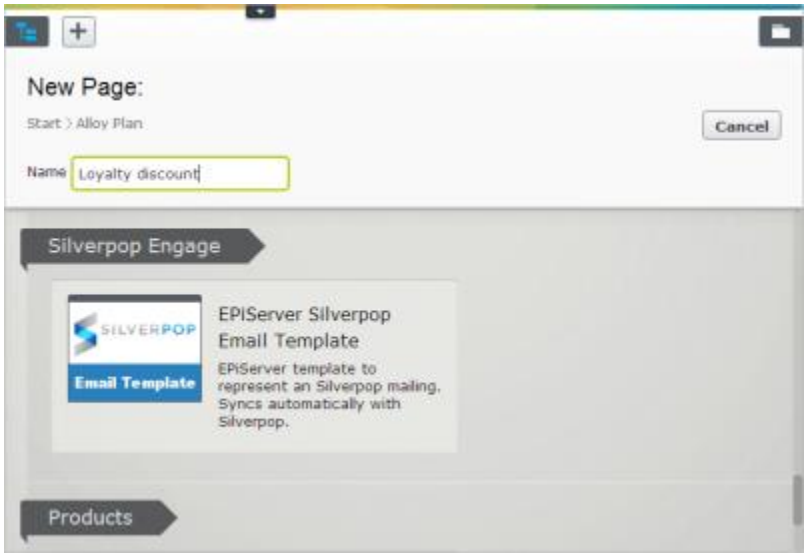
Once you publish it, the e-mail template will be saved into Silverpop Engage. You can adapt your e-mail communication based on the user's behavioral data to certain score, such as website sections browsed, links clicked etc.

To be able to create a mail template in EPiServer, make sure that it is enabled under a certain content type through a setting in admin view, for example, under the start page. Refer to EPiServer CMS user guide for administrators.

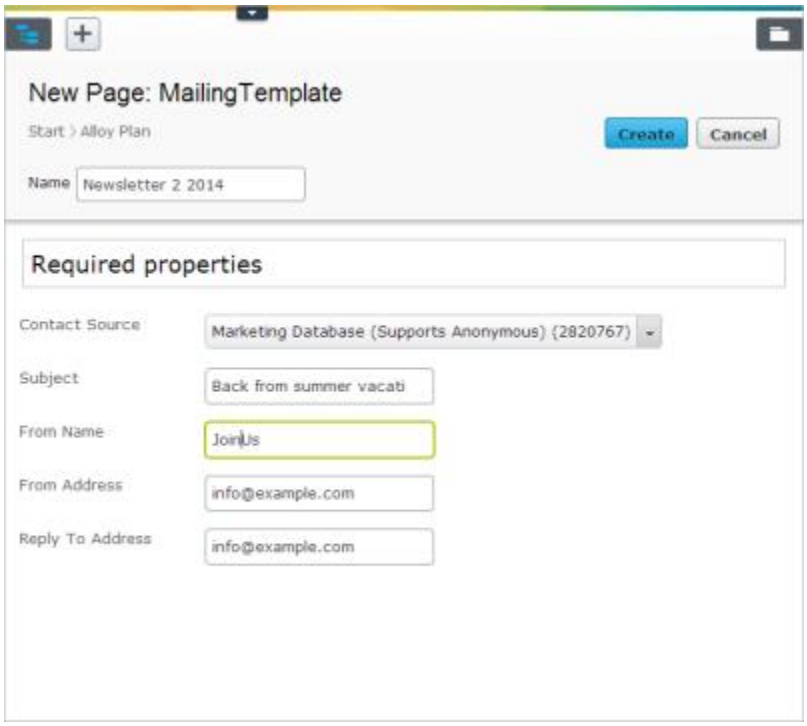
Make sure that the ***domain*** in the **From Address** is valid, in other words matches the one set up by your Silverpop Engage onboarding team.

Create a mailing in EPiServer as follows:

1. Create a page.
2. Select **[Silverpop] Mail Template**.

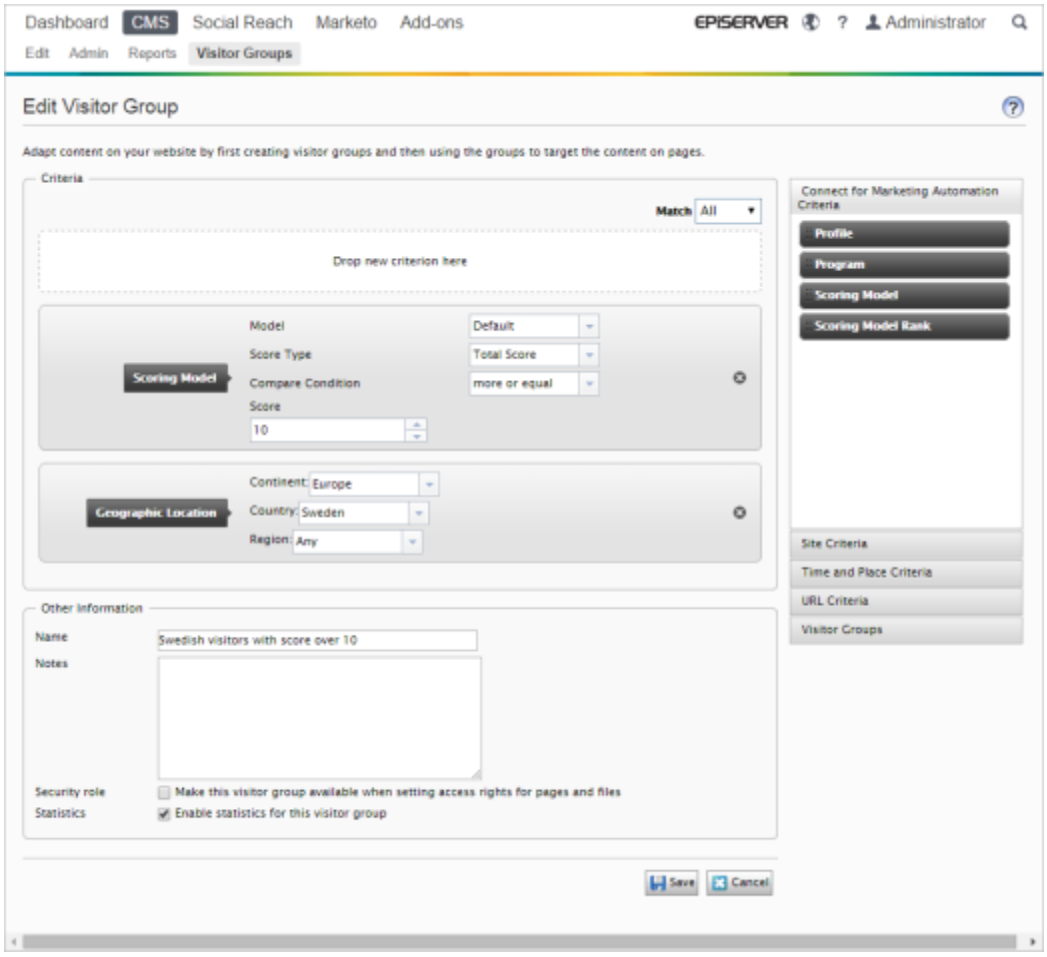


3. Enter the required properties, such as name of the newsletter, database used, subject and the address sent from, and click **Create**.



4. Add content, such as text and media. The template supports both content in HTML and text, and you should add content to both in case the recipients have disabled e-mails in HTML format.
5. Select the **CRM enabled** property to enable this template to be shared with the CRM integration.
6. Publish the mail template.
7. Log in to **Silverpop Engage** > **Home** > **Content** > **View Mailings** to see the mail template created.
8. Select the mail template, add content and submit the mailing. Silverpop Engage will then start tracking of the recipients demographic and behavioral data.

Creating visitor groups



The add-on integrates Silverpop Engage web tracking to EPiServer's personalization engine by identifying a visitor via the **iMAWebCookie** cookie.

You can use the following set of EPiServer Connect for Marketing Automation visitor group criteria to personalize your website content in EPiServer CMS:

- **Profile** are segments identified visitors against their information stored in Silverpop Engage.
- **Program** are segments identified visitors based on enrollment in a specific Silverpop Engage program.
- **Scoring Model** are segments identified visitors based on their scores against specific Silverpop Engage scoring models.
- **Scoring Model Rank** are segments identified visitors based on their rank in specific Silverpop Engage scoring models.

To create visitor groups, you can combine different criteria, for example, the geographic location criteria in EPiServer CMS with the scoring model criteria in Silverpop Engage.

For more information about creating visitor groups, see *Administering visitor groups*.

Examples of creating visitor groups

This section provides the following examples on how you can define the visitor groups by combining different criteria:

Profile criteria

Create a form block and a form. Save the form to the folder Silverpop Engage's database (Marketing Database). Drag the form block to the page in your campaign or program, and publish it at the appropriate time.

In EPiServer CMS > **Visitor Groups**, create a visitor group using the **Profile** criteria. In this example, the desired visitors for the campaign or program have a profile containing "Sweden" in the **Country** column. A contact with this value will be added to the Silverpop Engage database.

Program criteria

Create a program in Silverpop Engage > **Home** > **Automation** > **Programs** > **Create**. Activate the program you have created.

In EPiServer CMS > **Visitor Groups**, create a visitor group using the **Program** criteria. Select either **ActiveProgramOnly** to include all active programs, or the name of a particular program.

Scoring Model criteria

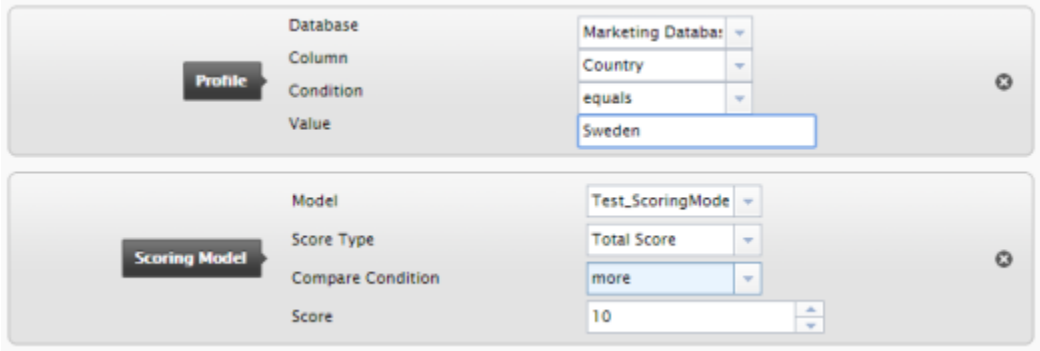
Create a scoring model in Silverpop Engage > **Home** > **Scoring** > **Scoring Model** > **Create**. After creating the scoring model, new fields are added into Marketing Database with name "Scoring001_Rank", "Scoring001_Score" and "Scoring001_Behavior".

In EPiServer CMS > **Visitor Groups**, create a visitor group using the **Scoring Model** criteria.

Create a form block and a form. Save the form to the folder Silverpop Engage's database (Marketing Database). Drag the form block to the page in your campaign or program, and publish it at the appropriate time.

A contact who has entered a specific form field, the value will be added to the Silverpop Engage database according to the scoring model you have set up, for example, "Scoring001_Score" = 10.

For example, you can combine the **Profile** and **Scoring Model** criteria with visitors from Sweden with a total score over 10.



Scoring Behavioral criteria

In Silverpop Engage user interface, you can define how to calculate behavioral score. Select which model to use in the criteria. A contact matching this value will make EPiServer CMS to display the appropriate content you have defined.

Note that the behavior score is not calculated in real time. It could take several hours to calculate the score after the visitor submitted a form, and for the form's data go through the scoring model, and for the score to be evaluated in the data sheet.

Scoring Model Rank criteria

In Silverpop Engage user interface, you can define how to calculate ranking in a score model. Select which model to use in the criteria. A contact matching this value will make EPiServer CMS to display the appropriate content you have defined.

Create a scoring model with ranking in Silverpop Engage > **Home** > **Scoring** > **Scoring Model** > **Create**.

In EPiServer CMS > **Visitor Groups**, create a visitor group using the **Scoring Model** criteria.

The value in **Rank** field must correspond to **Ranking** of Silverpop Engage.

Managing content in Marketo

This document describes how to adapt the content on your website using the **EPiServer Connect for Marketing Automation** add-on for Marketo. Here you can also find out how to create visitor groups.

Mailings are not described here, as they are created in Marketo.

To be able to use this feature, your system administrator must install the add-on, see *Administering add-ons*.

Managing website content

It is possible to personalize web content for visitors with data from Marketo, applied to blocks, pages or dynamic content. This can be done by creating visitor groups in EPiServer using criteria from the Marketo database.

Creating a form

Create a form in EPiServer and connect it to Marketo as follows:

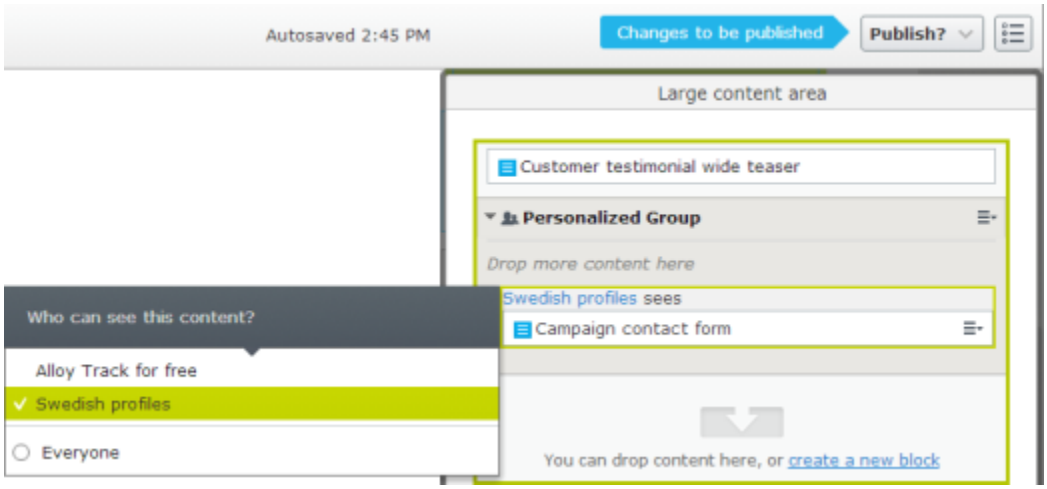
1. *Create a form block* in EPiServer edit view, for example, name it “Autumn Sales”.
2. Create the form in EPiServer, for example, name it “Campaign”. Make sure to select **Form can be sent without logging in** and **Same person can send the form several times**.
3. In **Folder:/**, select the Marketo database.
4. Add the form fields, such as a text box. To be able to map a form field to each Marketo field, it must be created on the Marketo side before it is used.
5. Add the **Submit** button. The contact information of the visitors’ who submitted the form will be stored in the database.
6. Drag the form block to the page used in your campaign or program, and publish it at the appropriate time.
7. Go to **Marketo** > **Lead Database** > **All Leads**. Select the contact list to see all contacts of visitors who submitted the form.

Personalization using a block

Personalize the block as described in *Personalizing content*. Connect the block to any of the existing visitor groups in edit view.

If it is a form block, add the form you have created and connected to Marketo.

In this example associated content displays on a page when the visitor match the “Swedish profiles” criteria.

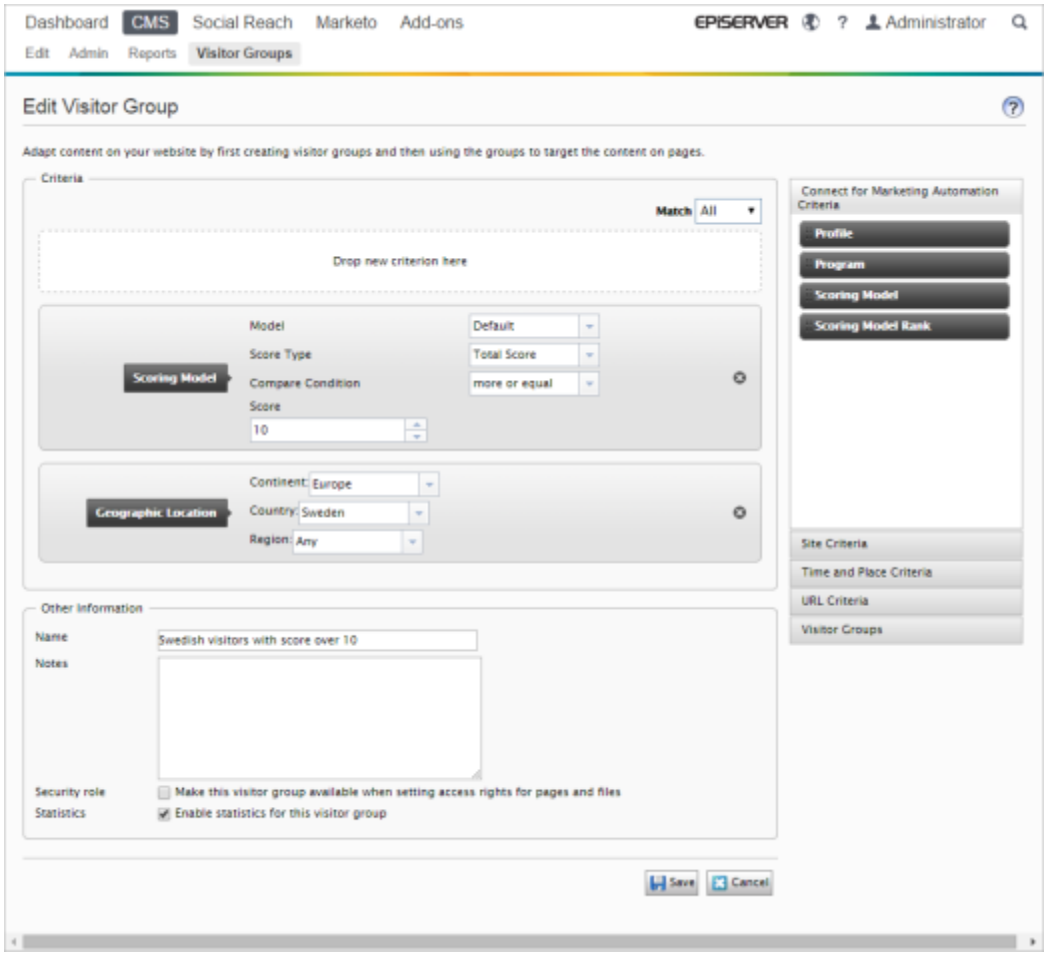


Personalization using dynamic content

The fields used here are created in Marketo. Personalize using dynamic content as follows:

1. Create or edit a page in EPiServer CMS.
2. Add a piece of existing *dynamic content* in rich-text editor area of the page.
3. Select to edit the dynamic content. In **Type**, select **Personalized Content**.
4. Select a form. In **Folder:/**, select the Marketo database.
5. Drag a field into **Drop fields here** area, for example, “Country”.
6. Click **OK** to insert the dynamic content to the rich-text editor.
7. Save your changes.

Creating visitor groups



The add-on integrates Marketo web tracking to EPiServer's personalization engine by identifying a visitor via the **_mkto_trk** cookie.

You can use the following set of EPiServer Connect for Marketing Automation visitor group criteria to personalize your website content in EPiServer CMS:

- **Profile** are segments identified visitors against their information stored in Marketo.
- **Scoring Model** are segments identified visitors based on their scores against specific Marketo scoring models.

To create visitor groups, you can combine different criteria, for example, the geographic location criteria in EPiServer CMS with the scoring model criteria in Marketo.

For more information about creating visitor groups, see *Administering visitor groups*.

Examples of creating visitor groups

This section provides the following examples on how you can define the visitor groups by combining different criteria:

Profile criteria

Create a form block and a form. Save the form to the folder Marketo's database. Drag the form block to the page in your campaign or program, and publish it at the appropriate time.

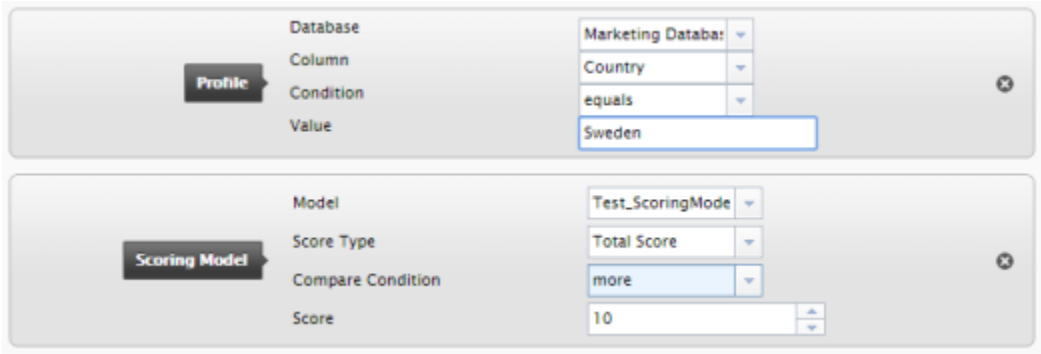
In EPiServer CMS > **Visitor Groups**, create a visitor group using the **Profile** criteria. In this example, the desired visitors for the campaign or program have a profile containing "Sweden" in the **Country** column. A contact with this value will be added to the Marketo database.

Scoring Model criteria

Marketo is using a simple scoring model of the total score for a contact (called Lead Score), which can be changed by a flow action in a smart campaign.

In EPiServer CMS > **Visitor Groups**, create a visitor group using the **Scoring Model** criteria.

Create a form block and a form. Save the form to the folder Marketo's database. Drag the form block to the page in your campaign or program, and publish it at the appropriate time.

A contact who has entered a specific form field, the value will be added to the Marketo database according to the scoring model you have set up, for example, "Scoring001_Score" = 10.

For example, you can combine the **Profile** and **Scoring Model** criteria with visitors from Sweden with a total score over 10.