



IBM Software Group

WebSphere Commerce V7.0

Multi-channel precision marketing overview



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This presentation introduces multi-channel precision marketing in WebSphere® Commerce version 7.

Goals

- To understand the capabilities of WebSphere Commerce marketing activities



At the end of this presentation, you should understand the capabilities of the WebSphere Commerce marketing activities, including both Web activities and Dialog activities.

Agenda

- Objectives of multi-channel precision marketing
- Creating marketing activities
- Working with statistics
- Customization options



This presentation will begin with an introduction to the objectives of multi-channel precision marketing. The main focus of the presentation will be on creating Web and Dialog marketing activities. The presentation will conclude with a summary of available marketing statistics and a summary of customization options.

Multi-channel precision marketing objectives

- Increase conversion rates
- Deliver personalized, relevant marketing content
- Create continuous, multi-step interactions

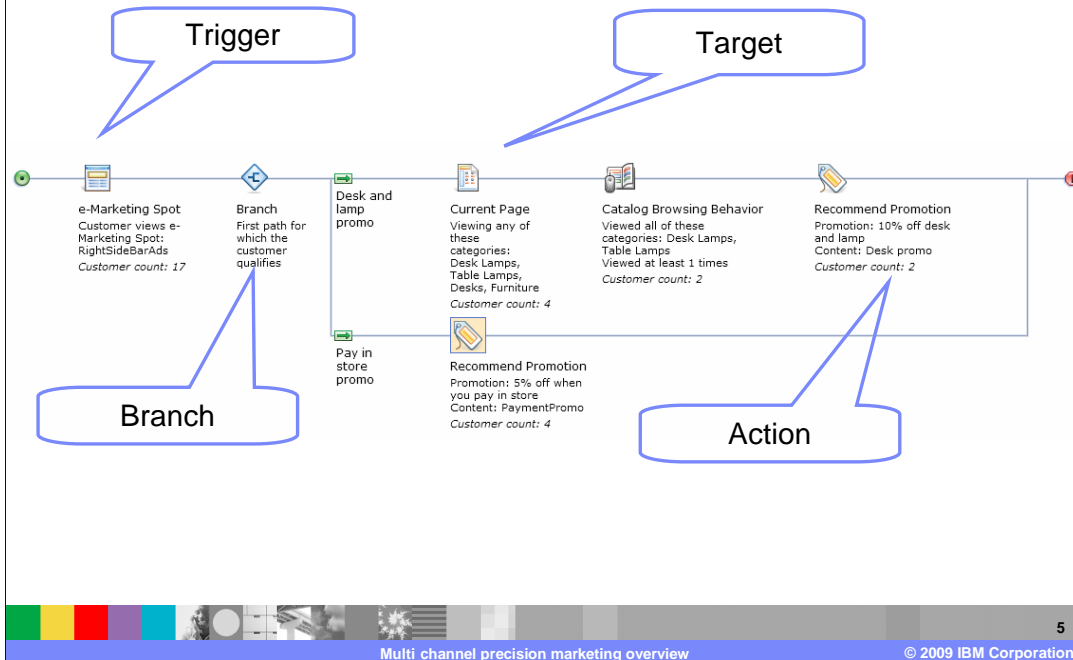
- Multi-channel precision marketing is an integrated solution to handle on-going *dialogs* with shoppers, *over time, across channels* as shoppers' behaviors change



Multi-channel precision marketing represents a significant increase in marketing capability over previous releases. The goal remains to increase the conversion rate of browsers into buyers. The marketing capabilities in version 7 offer new ways to personalize marketing content and target customers across multiple channels increasing both the reach and applicability of the marketing message. Dialog activities allow you to define continuous, multi-step interactions that react to shopper behaviors over time.

Overall, multi-channel precision marketing is an integrated solution to handle on-going *dialogs* with shoppers, *over time, across channels* as shoppers' behaviors change.

Terminology review



This slide is a review of WebSphere Commerce marketing terminology.

A trigger is used to wait for a shopper to do something, or to wait for a certain period of time to elapse. When a trigger occurs, the activity flow can continue from where the trigger was defined in the flow.

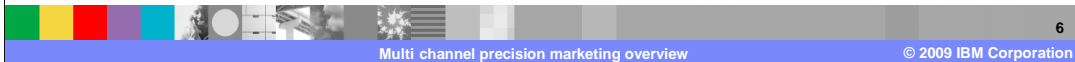
A target is used to qualify shoppers for subsequent actions or continue execution of the activity flow. Targets are typically based on a shopper's behavior and segmentation.

An action is a step to perform as part of the activity flow. Actions are the "to dos" based on the previous sequence of triggers and targets. Most actions are for marketing purposes, such as display content in an e-Marketing Spot, or send the shopper an SMS message.

A branch is a decision node in an activity where shoppers might see or qualify for different content based on some outcome or result.

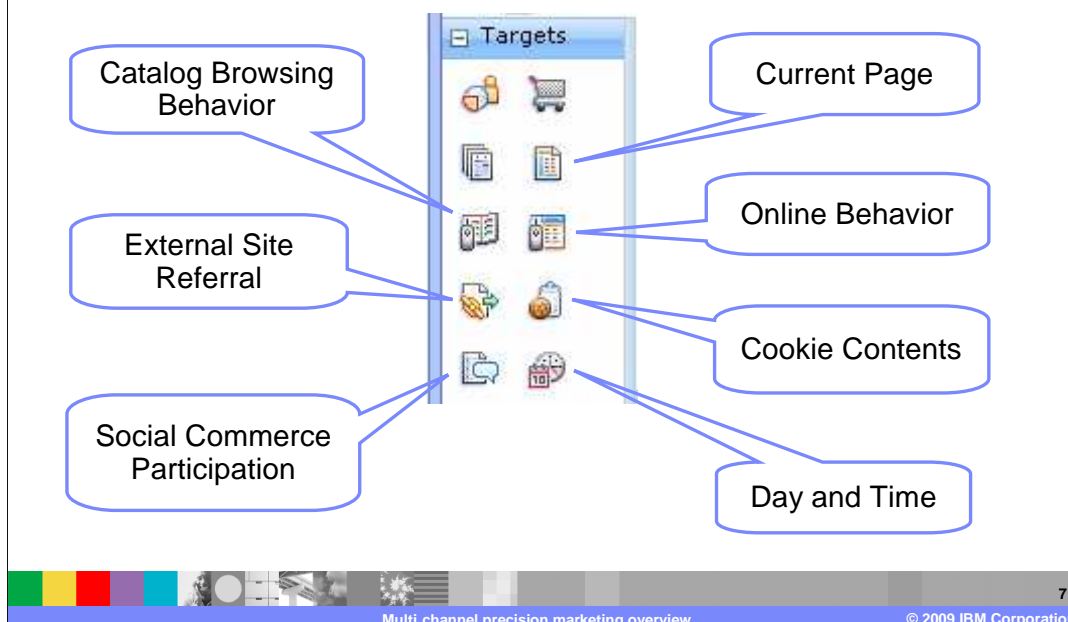
Web activities

- E-marketing Spot based
- Personalized content
- Based on current and past actions



A Web activity exists completely within an e-Marketing Spot of an online store. Web activities allow you to deliver personalized content to help influence purchases and drive sales. The content shown can take into account current and past actions within the store in addition to membership in customer segments.

New Web activity targets



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Many new targets have been added to the Web activity builder. Most of these targets focus on current and past interactions the shopper had with the site and allow marketing activities to reach beyond shopping cart contents and order history.

The Catalog Browsing Behavior target allows you to track the behavior of a shopper over time and display a marketing message when a specified behavior pattern is met.

The External Site Referral target checks if the shopper's current session was referred from a specific site. As well, the target can optionally check for name-value pairs that were used on the referral URL. The referral name-value pairs can be used to find which search keywords were used when being referred to the WebSphere Commerce site.

The Social Commerce Participation target allows you to target shoppers based on their social commerce behavior. Shoppers with a high number of interactions can be rewarded. Shoppers with a low number of interactions can be encouraged to participate more and shoppers with no interactions can be informed about the social commerce capabilities on the site.

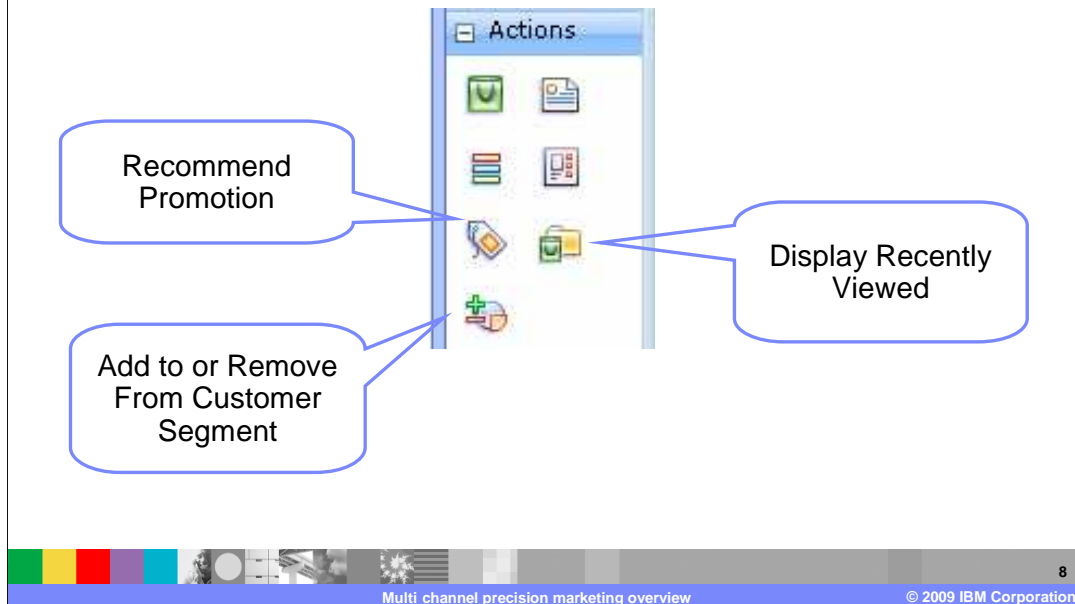
The Current Page target applies to catalog and search pages in addition to name-value pairs in the URL. Depending on the type of Current Page target selected, the marketing engine will determine whether the shopper meets the criteria at that point in time.

The Online Behavior target is similar to the Catalog Browsing target but tracks other site usage over time. Search keywords can be tracked in addition to URL name-value pairs. When a particular behavior pattern is met, the marketing message is displayed.

The Cookie Contents target behaves in the same way but looks only at values in the shopper's cookie. To use the Cookie Contents target, the IT developer needs to modify the e-Marketing Spot JSP snippet to provide the data from the relevant cookie.

The Day and Time target specifies valid days of the week and time ranges, and evaluates the current system time to see if it falls within the specified criteria.

New Web activity actions



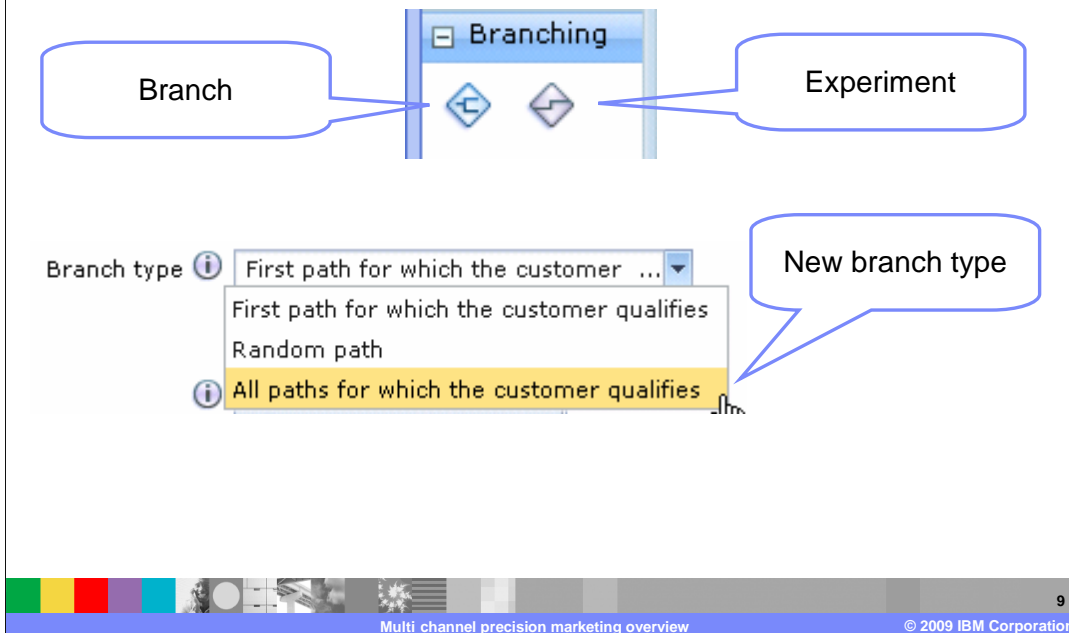
Three new actions have been added for Web activities.

The Recommend a Promotion action associates Content with a Promotion, similar to the current functionality in Accelerator Web Activities.

The Display Recently Viewed action returns the set of previously browsed categories or catalog entries. You can specify how many categories or catalog entries to record for each shopper. This can be used to display a "Recently Viewed" list to shoppers. The list is ordered, with the most recently viewed at the top of the list. You can specify the maximum number of items returned in the list.

The Add/Remove Customer to/from Segment action provides a radio button with two options: one for adding the shopper to a segment, and one for removing the shopper from a segment. The UI presents a grid where the customer segment can be selected. The customer segment selected must be flagged as being used in marketing activities. That setting is shown in a later slide.

Branching



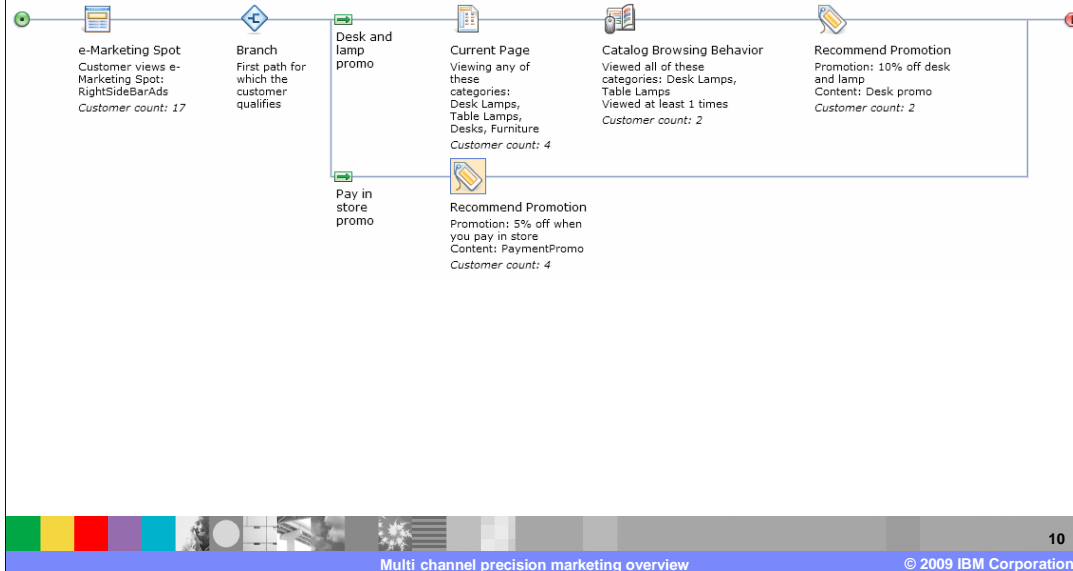
Branches are decision nodes in an activity where shoppers might see or qualify for different content based on some outcome or result. In the user interface, branches look like and behave similar to experiments, but with some notable differences.

Branches have fewer restrictions than experiments. There are no limits to the number of branches in an activity. While there is a restriction of one Experiment per activity, you can create multiple branches per activity if required. Branches can be nested. In addition to having multiple branches in an activity, branches can exist within other branches as well.

Branches cannot be used in place of an experiment. Paths within a branch can not be marked as a winner, and therefore, a new activity can not be created from a winner. Branches do not keep detailed order statistics.

There are three branch types. With the If-Then-Else type, the shopper follows the first path for which they qualify. In the Follow-All-Paths type, the shopper follows all paths for which they qualify. Finally, in the Random type, a path is selected at random based on an assigned percentage. The shopper follows the selected path only if they qualify.

Sample Web activity



This screen capture shows a sample Web activity and activity element counters. Activity statistics are discussed in a later slide.

Notice the granularity provided by the new targets. In the first path, the promotion is only recommended to the shopper if they are viewing a specific page in the catalog and have a specific past browsing history.

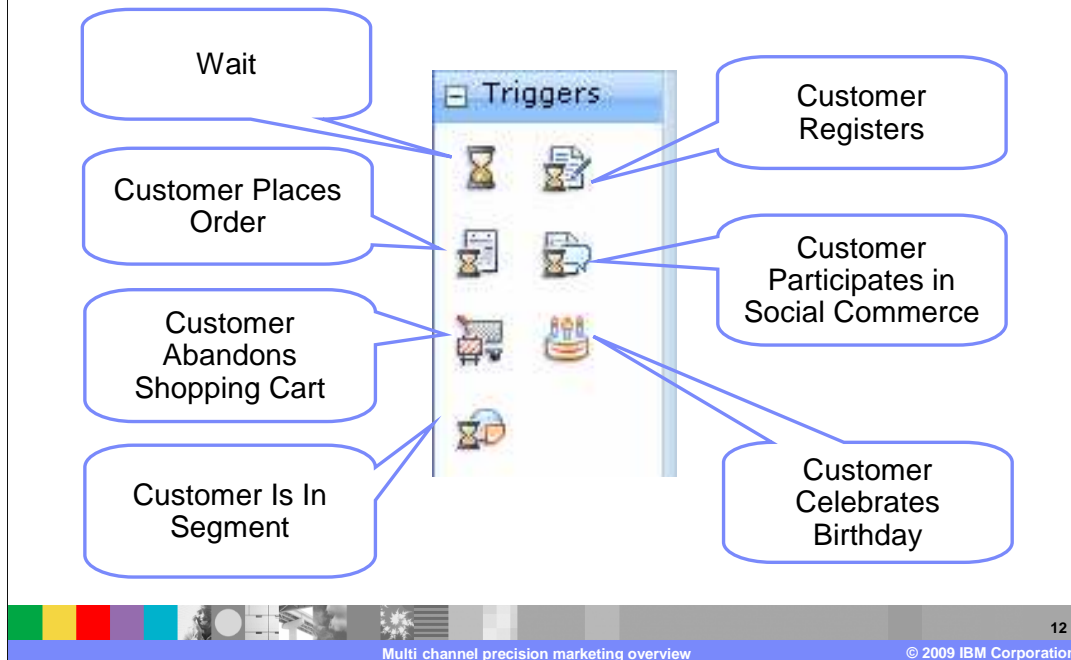
Dialog activities

- Multi-step interactions
- Initiated by specific shopper action
- Track behavior over time
- Extend beyond e-Marketing Spots



Dialog activities are new in version 7. These marketing activities allow for multi-step interactions that map out a series of steps to achieve a specific shopper result, such as making a purchase. Initially, the shopper must take some action or be placed in a segment to initiate the dialog. Once the dialog has started it can look for and react to ongoing behavior of the shopper rather than just current or past behavior.

Dialog activity triggers



Unlike Web activities, which are triggered only by the presence of an e-Marketing Spot on a page, Dialog activities can use many triggers to initiate and control the flow of a marketing activity. In many cases, the shopper does not need to be logged into the store for a trigger to activate.

The Wait trigger waits for the specified number of minutes, hours, days, weeks or months and then the activity continues where it left off.

The Customer Places Order trigger is a simple true or false evaluation.

The Customer Abandons Shopping Cart trigger checks for carts that have been abandoned for a specified number of days

The Customer Registers trigger is a true or false evaluation

The Customer Participates in Social Commerce trigger looks for a specified number of social content contributions with a specified period of time.

The Customer Is In Segment trigger is a true or false evaluation of the shopper's membership in a specified segment.

The Customer Celebrates Birthday trigger checks for shoppers who are celebrating a birthday within a specified number of days

Targets and actions for Dialog activities

The image shows a software interface with two panels: 'Targets' and 'Actions'. The 'Targets' panel contains several icons representing different target types. A callout bubble points to this panel with the text 'Fewer options for Dialog activities'. The 'Actions' panel contains icons for 'Send Message by e-mail or mobile SMS' and 'Issue Coupon by e-mail or mobile SMS'. Callout bubbles point to these two icons with their respective labels.

Targets

Fewer options for Dialog activities

Send Message by e-mail or mobile SMS

Issue Coupon by e-mail or mobile SMS

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Dialog activities have fewer target options than Web activities. Web activity targets that react to a point-in-time online behavior (such as page currently being browsed) do not make sense for Dialog activities.

Dialog activities also have different action options including two that are not available for Web activities. They are Send Message and Issue Coupon. Messages and coupons can be sent by either e-mail or mobile SMS.

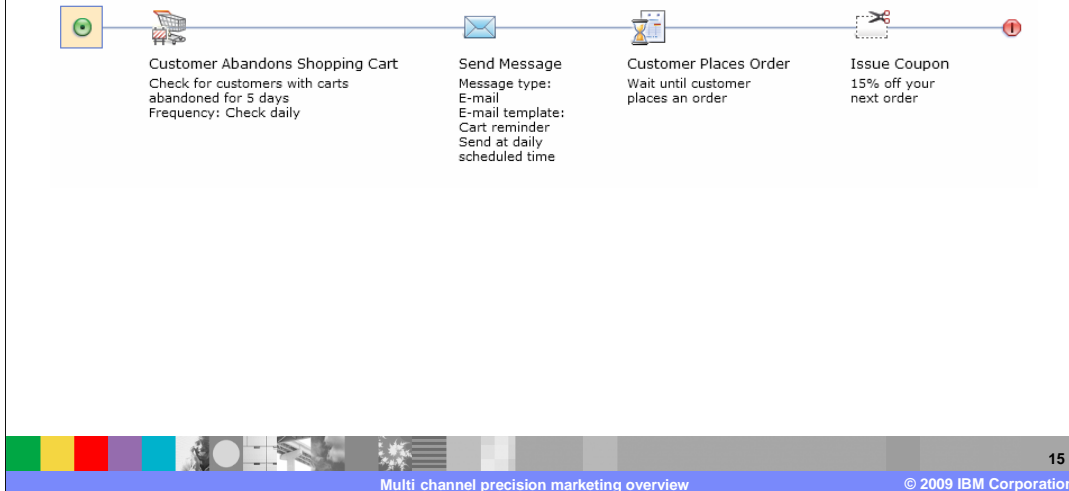
Branching

- Same branching options as Web activities
- First path for which the customer qualifies
 - ▶ Activity does not continue until one path is complete



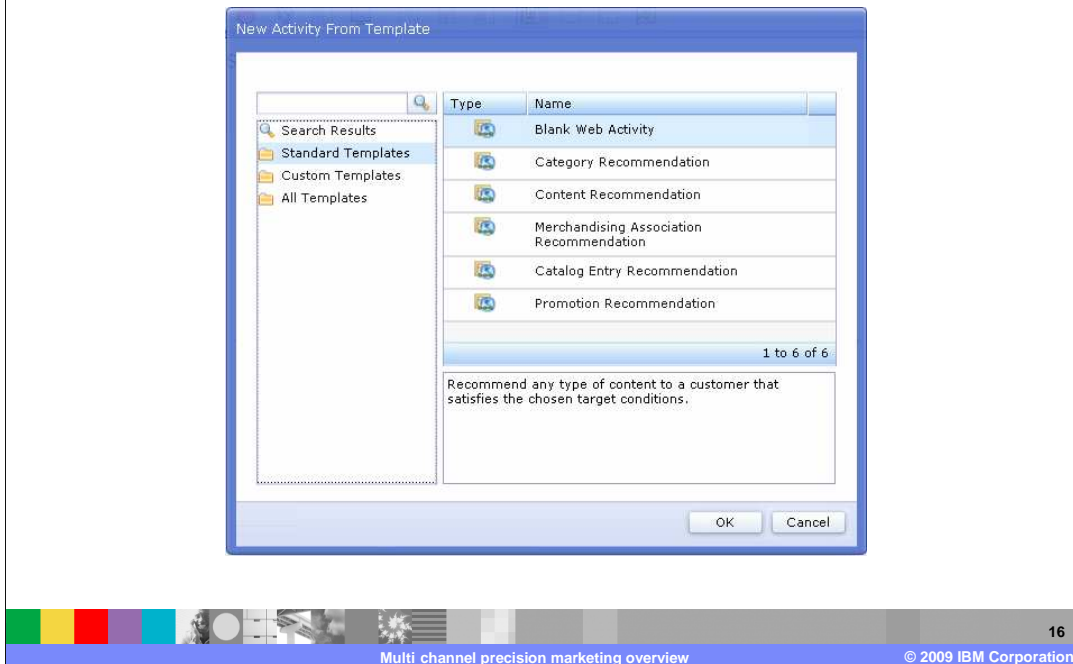
For triggers in Dialog activities, the If-Then-Else path means to wait for the first of the paths for which the shopper reaches the end. The simple case is where there is one trigger at the start of each path. This means that the shopper will move down the path that is associated with the first event that occurs from the defined set of triggers in the Branch.

Sample Dialog activity



This screen capture shows a simple Dialog activity that targets abandoned shopping carts. If a cart has been abandoned for five days, the shopper receives a reminder e-mail that advertises a coupon if they complete their order. If an order is then placed, the shopper is issued the coupon.

Activity templates



Activity templates provide prebuilt starting points for common activities. You can create custom templates for both Web activities and Dialog activities. Templates can be created from scratch or you can create a template from an existing activity.

Activity templates are activity-type specific. Web activities can be created using Web activity templates, and Dialog activities can be created using Dialog activity templates. You cannot convert from one type of template to another.

Dynamic customer segmentation

*New Customer Segment

Specify a value for the **Name** field.

Save and Close Close

General Properties Customer or Segment Registration Demographics Address Purchase Details Miscellaneous

*Name Specify a value for the **Name** field.

Description

Use marketing activities to add or remove customers

Dynamically add customers to a segment

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In version 7, customer segment creation is available in the Management Center Marketing tool. The segment parameters are the same as they are in Accelerator, with one exception. There is now a check box on the General Properties tab that you can use to indicate whether the segment is updated by marketing activities. If the box is checked, shoppers can be dynamically added to and removed from the group by both Web and Dialog activities. This allows you to create personas to use in marketing activities and to dynamically entitle shoppers to promotions based on their online behavior.

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Multivariate testing

Experiment statistics

General Properties Paths **Statistics**

Number of Unique Customers:

Paths	* Name	* Winner	Views	View Orders	View Revenue	Clicks	Click Orders	Click Revenue	Currency
	bottom		4	0	0.00	0	0	0.00	
	top		2	0	0.00	0	0	0.00	

1 to 2 of 2

Activity element counters

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Statistics are collected in memory and persisted in the database periodically by the SaveMarketingStatistics scheduled job. The default frequency for this job is every 15 minutes.

Statistics gathered for an experiment help you decide which experimental path was more successful for their particular test. View and click data are provided in the Statistics tab of the experiment properties view.

Experiment elements have an associated customer count; however, the value is different from the other element counts. The customer count for an experiment indicates the number of *unique* customers who reached the experiment. In the example shown here, the experiment element was reached six times in total. The bottom path was taken four times, while the top path was taken twice. The value shown in the Number of Unique Customers field is two which indicate that the six total page impressions were caused by two unique customers. These two shoppers are counted as participating in the experiment. If a maximum number of customers end condition is configured in the experiment definition, this count value indicates when the experiment will end.

Activity element counters provide a simple value indicating the number of customers who have reached the particular trigger, target or action element. Branches and paths do not have counters associated to them. In the example shown here, four customers went to the store home page. Of those four people, three saw an ad for free ground shipping and the buy one, get one free promotion was shown to the fourth customer.

Multivariate testing 2

e-Marketing Spot

General Properties **Statistics**

E-Marketing Spots

* Type	* Name	Views	Clicks	Click-through rate (%)
	CategoryPageRecommen dations	20	1	5.0

1 to 1 of 1

E-Marketing Spot Activity statistics

E-mail Activity statistics

General Properties **Statistics**

E-mail sent status Sent

E-mail delivery

Attempted	Bounced	Bounced (% of Attempted)	Delivered	Delivered (% of Attempted)
2	0	0.0	2	100.0

1 to 1 of 1

E-mail effectiveness

Opened	Opened (% of Delivered)	Clicked	Clicked (% of Delivered)	Clicked (% of Opened)
1	50.0	0	0.0	0.0

1 to 1 of 1

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E-Marketing Spot activity statistics provides the views, clicks and click ratio statistics for each e-Marketing Spot on which a Web activity is running. The Statistics tab becomes visible when the activity has e-Marketing Spots with associated statistics data. If none of the e-Marketing Spots have any data the Statistics tab is not displayed. Note that this displays statistics for every e-Marketing Spot that was ever associated with the activity. This means that if you removed an e-Marketing Spot from the activity, its statistics will still show up in the tab.

E-mail Activity statistics returns all the e-mail activity statistics that are currently available in Accelerator. Statistics are gathered as the e-mail activity is running, and shoppers respond to the e-mail. For Management Center, the statistics for an e-mail activity will show up in a Statistics tab in the properties view when you create a new e-mail activity and save it.

Customization options

- Create or modify triggers, targets and actions
- Return new or enhanced data to an e-Marketing Spot
- Configure existing filters or create new ones
- Configure a marketing spot ordering scheme



There are many customization options for both the marketing runtime and the Management Center Marketing tool. This slide outlines some of the key customization capabilities. To find out more about how to customize the Marketing tool in Management Center, see the presentation on Marketing customization.

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