# Sitecore CMS 6.5

# Executive Dashboard Cookbook

*A Marketers Guide to the Executive Insight Dashboard*

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# Chapter 1

# Introduction

The Executive Dashboard Cookbook is for marketers who want to get a high level perspective of Engagement Analytics for their website. This includes Chief Marketing Officers (CMOs) that want an overview of their marketing activities and Search Engine Optimization marketers (SEOs) who want to see at a glance which of their SEO strategies are the most effective.

Engagement Analytics and the Executive Insight Dashboard enables you to measure the quality of your site visits not just the quantity.

This cookbook contains the following chapters:

- **Chapter 1 — Introduction**
  This chapter contains an overview of the Executive Insight Dashboard. It explains how to filter the dashboard by timeline or resolution and contains a glossary of terms used in Engagement Analytics.

- **Chapter 2 — Tour of the Executive Insight Dashboard**
  This chapter provides a visual overview of the different elements that make up the Executive Insight Dashboard.

- **Chapter 3 — Dashboard Scenarios**
  This chapter includes scenarios for marketers. Each scenario explains how using Engagement Analytics and the Executive Insight Dashboard can help marketers to solve key marketing problems.

- **Chapter 4 — Additional Dashboard Functionality**
  This chapter describes how to perform additional user actions in the Executive Insight Dashboard. For example, it explains how to export a dashboard or chart to Microsoft Excel or how to classify different traffic types.

- **Chapter 5 — Appendix**
  This chapter contains a complete list of all dashboards and charts available in the Executive Insight Dashboard.

## 1.1 Overview

The Executive Insight Dashboard is a Microsoft Silverlight application that you can launch from the Sitecore desktop to give marketing executives a quick high level overview of website traffic and marketing campaign effectiveness.

### 1.1.1 Dashboard Types and Charts

In the Executive Insight Dashboard, there are three different types of dashboard available. Each one contains a selection of different charts that you can view to analyze your traffic and campaign data in more detail. The charts available vary slightly depending on which type of data you choose to view.

Summary of charts in the Executive Insight Dashboard:

| Data | Dashboard Type | Charts |
|---|---|---|
| Traffic | Executive Overview | Value, Visits, Value per Visit, Brand Awareness, Source Value, Source Value per Visits |
| | First Impression | Referring Sites, Search Keywords, Entry Pages, |
| | Engagement | Site Search, Assets Consumed, Goal Conversions, |
| Campaigns | Executive Overview | Value, Visits, Value per Visit |
| | First Impression | Referring Sites, Campaigns, Search Keywords, Entry Pages |
| | Goals and Conversions | Site Search, Assets Consumed, Goal Conversions |

For a complete list of all dashboards and charts available in the Executive Insight Dashboard, see the Appendix List of all Dashboards.

### 1.1.2 Dashboard Filters

Filter dashboards by date using the timeline and resolution controls. The timeline controls enables you to use a slider to select a specific date range depending on which resolution you have chosen. For example, if you choose *Month* you can use the slider to select one or more months. If you select *Quarter* then you can select one or more quarters as your chosen time period.

The options displayed in the *Resolution* drop-down only appear if there is data available. For example, when you start using the dashboard *Days* is one of the options displayed. When you have built up enough data, then *Weeks* will appear and so on. If there is insufficient data available to display a particularly time resolution then that option will appear greyed out.

## 1.2　Engagement Analytics Terminology

In the Sitecore Engagement Analytics, there are several terms and phrases used to describe how visitors interact with a website. The more familiar you are with these terms and phrases, the better equipped you will be to interpret the dashboards and charts in the Executive Insight Dashboard.

### 1.2.1　Visitor

A visitor is a person that makes one or more visits to a website.

### 1.2.2　Visit

A visit consists of all the actions a visitor takes from the moment they enter a website until the moment they leave. These actions consist of all pages viewed, and resources consumed, such as campaigns triggered and conversions achieved. The dashboard counts visits and the value of visits over a specific time period and displays this data in a number of different charts.

More detailed information about each visitor session is available in the Engagement Analytics *Visit Detail* report which you can also access from the Sitecore Desktop.

### 1.2.3　Conversation

When you meet with a customer online, you are essentially engaging in a conversation. An exchange of communication and commitment is taking place.

### 1.2.4　Commitment

Usually, a commitment is any visitor action that requires a higher level of commitment than just viewing a web page. In Engagement Analytics there are several different types of commitments to be aware of.

**Cash Commitment**

On an E- Commerce website, the sale of goods is a clear, straightforward cash commitment.

**Transactional Commitment**

A transactional commitment is a visitor action such as registration, requesting a sales call or signing up for an email newsletter. It is any action that shows a higher level of engagement with the website than just browsing web pages or downloading a document.

**Referential Commitment**

Some sites do not have clear points of transactional commitment. On these sites you may need to place the Engagement value on a page being viewed or an asset being downloaded. Referential commitments are difficult to define, so use them cautiously, they can provide misleading conclusions.

### 1.2.5　Engagement Value

The level of commitment exhibited by your customer is the secret ingredient of quality called the *Engagement Value.* Each visit produces an engagement value calculated from all the resources a visitor consumes during one or multiple visits. Resources consumed can include goals, campaigns or forms submitted.

You can allocate a numeric value or points to each resource on your website using the *Points* field. Only apply points to pages that require commitment from a visitor. For example, registering on a website shows commitment, just reading or downloading a white paper does not.

*The Points field in the Marketing Center:*
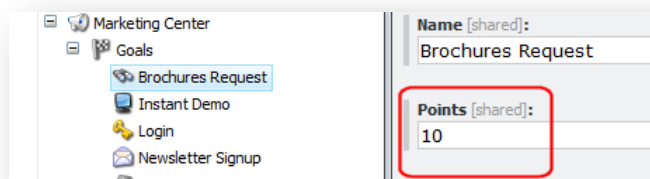


Goals and page event content items contain a *Points* field into which you can enter a value. Sitecore Engagement Analytics uses this number to calculate an overall value for a visit. As a visitor navigates around the website achieving various goals and triggering different page events the value of their visit is calculated. When a visitor leaves the website their total accumulated points for the visit are displayed in the Executive Insight Dashboard as the *Engagement Value*.

## 1.2.6    Engagement Value Points

Engagement value points or EVPs are the key to engagement analytics. There is a *Points* field in every goal or page event content item to which you can assign a numeric value. A visitor accumulates points depending on what actions they take when they visit a website.

For example:

- Newsletter Registration - 25 Engagement Value Points

- Online Pricing Quote - 50 Engagement Value Points

- Request for Demo - 100 Engagement Value Points

Every time a visitor lands on a page that has a goal or page event associated with it they accumulate points which contribute to their overall score. After they have left the website this score becomes the engagement value for that visit.

The number allocated to each goal is not important but the ratio between EVPs is. For example, the marketer must understand why *Request for Demo* is four times more valuable than *Newsletter Registration*.

## 1.2.7    Relevance (Value per Visit)

Relevance measures the value per visit of your website visitors. If your website has more relevance to your customers then your marketing effectiveness increases.

**Formula:**

```
Relevance = Value/Visits
```

## 1.2.8    Potential

Potential is a formula used to calculate how much value you could gain if you managed to increase the relevance of a page up to the same level as the site average.

**Formulas:**

```
Potential value gain = (Average Relevance — Relevance) x Number of Visits
Potential = Potential value gain *100 / Sum(All facets Values)
```

Obviously some pages should and will always have a low Potential, but if you create a landing page that you think will make a significant contribution to the website and it turns out to have a low Potential, then you need to re-examine it.

## 1.2.9 Traffic Types

In Engagement Analytics, you segment all your website visitors by traffic type.

Traffic types are marketing channels that are normally difficult to segment and analyze, such as *News*, *Conversations* and *Community* (see the Traffic Type table for definitions).

In the Executive Insight Dashboard, you have the option to view charts for all traffic types or each individual traffic type. Categorizing visits as traffic types makes it easier to measure the real value of visits (engagement value), relevance and traffic for every site visit.

Segmentation by traffic type or marketing channel enables you get the information you need to effectively analyze the traffic on your website and to make the right future marketing decisions. For example, SEO marketers can find this information useful when optimizing search key words.

Executive Insight Dashboard traffic types:

| Traffic Type | Definition |
| --- | --- |
| Direct | A visit to your website that originates from a visitor entering a specific URL in the address bar of a web browser. For example, you could enter *http://www.sitecore.net/dreamcore* to go directly to the Dreamcore landing page. |
| Email | A visit to your website that originates from a link contained in one of your own email campaigns. |
| Search Engine - Organic | A visit to your website that originates from a visitor entering a non-brand specific search term in a search engine. For example, you could enter *Best CMS* or *Top CMS software* and then click on one of the unpaid links displayed on the search results page to come to www.sitecore.net. |
| Search Engine - Branded | A visit to your website that originates from a visitor entering a specific brand name in a search engine. For example, you could enter *Sitecore* or *Sitecore CMS* and then click on one of the unpaid links displayed on the search results page to come to www.sitecore.net. You may configure as many brand name key words as you like. |
| Paid | A visit to your website that originates from a visitor clicking on a sponsored link. For example, the paid links in your own campaigns such as online Google Ad campaigns or banner ads. |
| Referred – Analyst | A visit to your website that originates from a link on an analyst website, such as Forrester or Gartner. |
| Referred – Blog | A visit to your website that originates from a link on a blog website. |
| Referred – Community | A visit to your website that originates from a social networking site, such as Facebook or Twitter. |
| Referred – Conversations | A visit to your website that originates from a link in a chat or instant messaging program, such as MSN Messenger. |
| Referred – News | A visit to your website that originates from a link on a news or media website. |

| Traffic Type | Definition |
|---|---|
| Referred – Other | All the referred visits to your website are placed in this category until a marketer categorizes them in one of the other categories. |
| Referred – Wiki | A visit to your website that originates from a link on a wiki website. |
| RSS | A visit that originates from an RSS campaign that you have created. |

# Chapter 2

# Tour of the Executive Insight Dashboard

This chapter provides you with a tour of the main visual elements and controls that make up the Executive Insight Dashboard.

- Dashboard Descriptions

- Tour of the Dashboard Interface

## 2.1 Dashboard Descriptions

This section contains descriptions for each of the charts available in the Executive Insight Dashboard.

The dashboard contains the following categories for campaigns and traffic types:

- Executive Overview
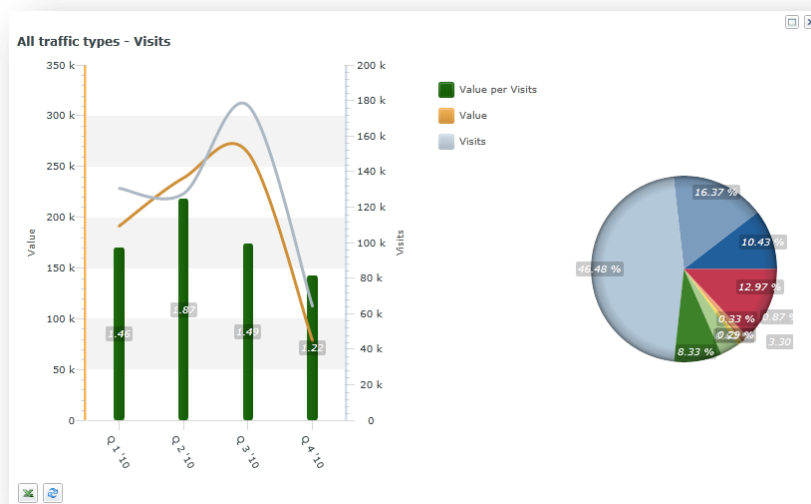- First Impression
- Engagement

**Note**
The number of charts available for campaigns and traffic types varies slightly depending on which category you choose. For example, when you choose Executive Overview, there are more charts available for traffic types than there are for campaigns.

### 2.1.1 Executive Overview Dashboard

The Executive Overview dashboard gives marketing executives a high level overview of their campaigns and traffic types.

*For example, Executive Overview dashboard, Visits chart:*



| Dashboard | Description |
|-----------|-------------|
| Value | A pie chart displays the Value generated by visits for all traffic types or campaigns. |
|       | Use this dashboard to get an overview of the value generated by each traffic type or campaign. |
|       | When you click on a pie chart segment for a single campaign or traffic type the trend table will show you the Value that campaign or traffic type has generated as a percentage of the total Value generated on the website. |

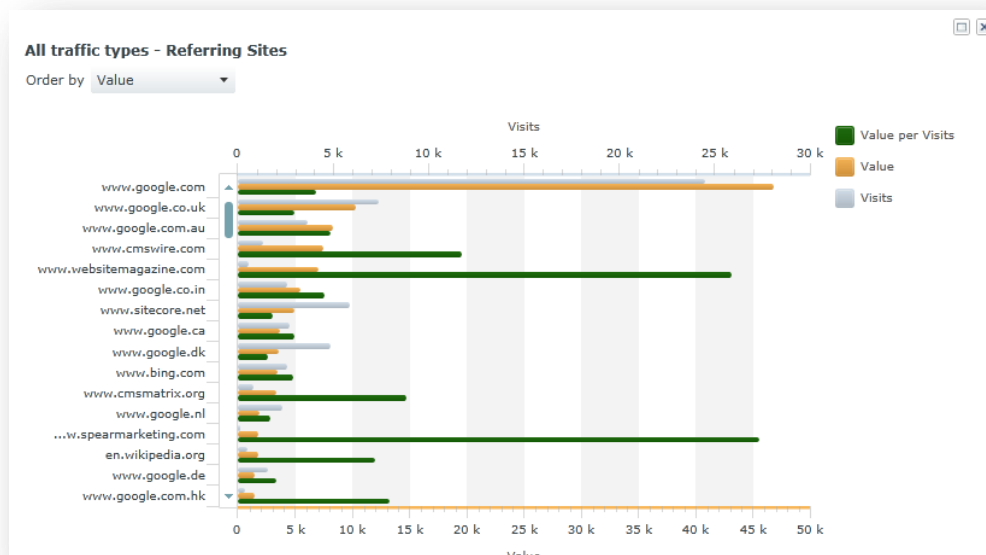| Dashboard | Description |
|---|---|
| Visits | A combination chart that displays the number of Visits, Value generated and Relevance (Value per Visits) for all traffic types and campaigns. Combination charts contain both line and bar charts.<br><br>Use this dashboard to get an overview of Visits and marketing effectiveness. Compare the number of Visits with Value and Relevance (Value per Visits) generated to determine the marketing reach and effectiveness. For example, if visits line is increasing at a faster rate than the value line, then your marketing is increasing the number of visitors, but your marketing effectiveness is decreasing. This will be shown by a decrease in the height of the Relevance bar.<br><br>This dashboard also contains a pie chart showing the percentage contribution made by each campaign or traffic type. |
| Value per Visits | A horizontal bar chart that displays more detailed information about the Relevance (Value per Visits*)* of Visits for each traffic type or campaign.<br><br>Use this dashboard to get an overview of Relevance. Find out which campaigns or traffic types have generated the most relevant visits.<br><br>Relevance enables you to get an overview of marketing effectiveness and is calculated using the following formula:<br>`Relevance = Value/Visits`<br><br>This dashboard also includes a Trend table that allows you to compare Relevance over time. For example, you can compare the selected quarter with the same quarter from a year ago. |
| Brand Awareness | A combination chart that displays Visits with Value and Relevance (Value per Visits) generated for the *Search Engine - Branded* traffic type.<br><br>Use this dashboard to get an overview of visitor brand awareness. For example, low brand awareness may indicate that you need to do more to promote the company brand.<br><br>*Search Engine - Branded* infers brand awareness when a visitor comes to the website using a brand specific search term in a search engine, such as *Sitecore* or *Sitecore CMS*. *Direct* traffic comes from visitors that may be more aware of the website as a brand because they enter the full address into the browser. This enables you to compare awareness of the company brand with the website brand.<br><br>This dashboard also contains a pie chart that compares the percentage Value generated by the *Direct* and *Search Engine – Branded* traffic types. Move the mouse over a wedge in the pie chart to see the label and percentage.<br><br>The Brand Awareness dashboard is only available for traffic types. |

| Dashboard | Description |
|---|---|
| Source Value | This pie chart displays more detailed information about the first point of contact for a site visitor (the visitor's first "source" of contact). It shows which traffic types have led to the highest Value visits.<br><br>Use this dashboard to get an overview of Source Value. Find out which traffic types lead to the highest Value visits. This can help you to assess which of your traffic types are the most effective.<br><br>This dashboard also includes a Trend table that allows you to compare Source Value over time. |
| Source Value/Visits | This horizontal bar chart shows which traffic types were the first point of contact and have led to the highest Relevance (Value per Visits) Visits.<br><br>Use this dashboard to learn which traffic sources lead to the most relevant visits. This can help you to assess which of your traffic types are most effective.<br><br>This dashboard also includes a Trend table that allows you to compare Source Value/Visits over time. |

## 2.1.2 First Impression Dashboard

This dashboard gives an overview of values relative to the visitor's point of entry to the website.

All first impression dashboards are horizontal bar charts. The default dashboard orders data by Value but you can select from a drop-down menu to change this to order by Visits, Value per Visits or Potential. All First Impression charts also have a pop up for each bar that appears when you move the mouse over the chart. The pop up shows detailed information about each bar you move the mouse over.

*For example, First Impression dashboard, Referring Sites chart*:

*The pop up shows detail when you move the mouse over a bar:*



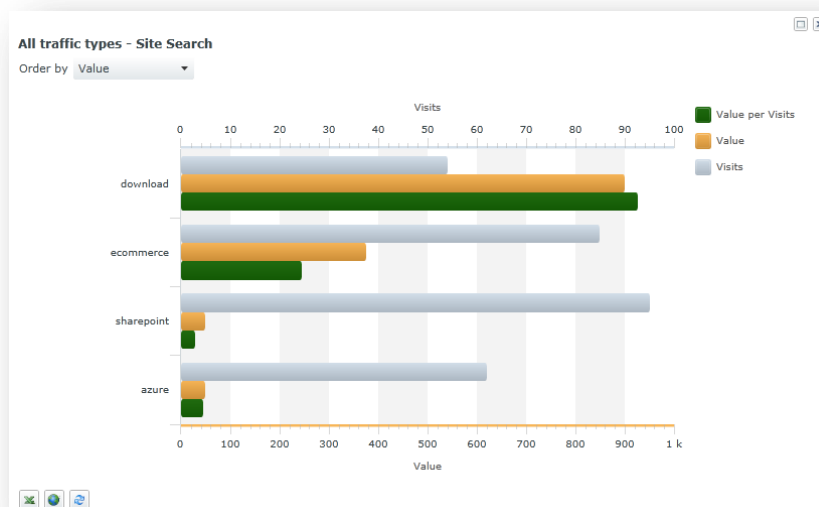| Dashboard | Description |
|---|---|
| Referring Sites | A horizontal bar chart showing the websites that referred visitors to your site.<br><br>Use this information as part of your SEO search strategy. These referral sources may be the sources your target audience use the most.<br><br>The default view shows which referring sites led to the highest value visits ranked by Value. |
| Campaigns | A horizontal bar chart showing the most successful campaigns on your website.<br><br>Use this dashboard to identify successful or failing campaigns.<br><br>The default view shows which campaigns led to the highest value visits ranked by Value. This chart is not available when viewing traffic. |
| Search Keywords | A horizontal bar chart showing the most popular search keywords used in search engines to find your website.<br><br>Use this dashboard as part of your SEO keyword optimization strategy to identify which keywords are most effective. Sort by Potential to see which have the most future potential.<br><br>The default view shows keywords that led to the highest value visits ranked by Value. |

| Dashboard | Description |
|---|---|
| Entry Pages | A horizontal bar chart showing the most popular entry pages for visitors and the Value they generated.<br><br>Use this dashboard to help identify pages that lead to the highest value visits and to also identify underperforming pages. Sort by Value per Visits or Potential to learn which entry pages are most effective and which have the greatest Potential for improvement.<br><br>The default view shows which entry pages led to the highest value visits ranked by Value.<br><br>An entry page could be a landing page created for a specific campaign or a page referred by another website. |

## 2.1.3 Engagement Dashboard

These dashboards show the levels of visitor engagement generated from different campaigns and traffic types.

All engagement dashboards are horizontal bar charts. The default dashboard displays Value but you can select Visits, Value per Visits or Potential from the drop down menu. All First Impression charts also have a pop up for each bar in the chart. Move the mouse over a horizontal bar to see additional detail.

*For example, Engagement dashboard, Site Search chart:*

*The pop up shows detail when you move the mouse over a bar:*



| Dashboard | Description |
|---|---|
| Site Search | A horizontal bar chart showing the most popular search words or phrases used on the website to find content relevant to site visitors.<br><br>Use this dashboard to find out which content visitors search for the most on your website. This could help when optimizing your website. For example, it may indicate that you could improve navigation or that you may need to add new pages for the content visitors are searching for.<br><br>The default view shows which search words or phrases led to the highest value visits ranked by Value. |
| Assets Consumed | A horizontal bar chart showing which assets were downloaded the most and which led to the highest value visits.<br><br>Use this dashboard to assess which assets you want to track in engagement analytics. For example, it may be appropriate to make the downloading of a white paper a goal and assign it points.<br><br>The term 'assets consumed' refers to visitors downloading brochures, white papers and other assets from the website during a visit. When a visitor downloads a brochure it shows a higher level of commitment on the website than just viewing pages. The assets that are downloaded more frequently may indicate topics of higher interest.<br><br>The default view shows which assets visitors consumed the most during high value visits ranked by Value. |

| Dashboard | Description |
|---|---|
| Goal Conversion | A horizontal bar chart showing which goals had the most conversions and generated the highest value visits on the website. Goal conversion means that a goal set by the marketer was accomplished by the visitor.<br><br>Use this dashboard to optimize your goal strategy. For example, knowing which conversions generate the highest value on your website may help you to evaluate whether you have set suitable goals and set an appropriate amount of points for each goal.<br><br>The default view shows which goals were converted and which led to the highest value visits ranked by Value.<br><br>You can also see which goals generated the most Visits, the most relevant visits (Value per Visits) and which goals show the most Potential. |

## 2.2 Tour of the Dashboard Interface

The Executive Insight Dashboard enables you to view and analyze website traffic and marketing campaigns on your website. The dashboard interface consists of four main elements:

- Dashboard data selection

- Dashboard type

- Chart type

- Timeline/Resolution filters

### 2.2.1 Dashboard Data Selection

Use the drop-down to select either Traffic or Campaign data.

*The dashboard data selection drop-down:*
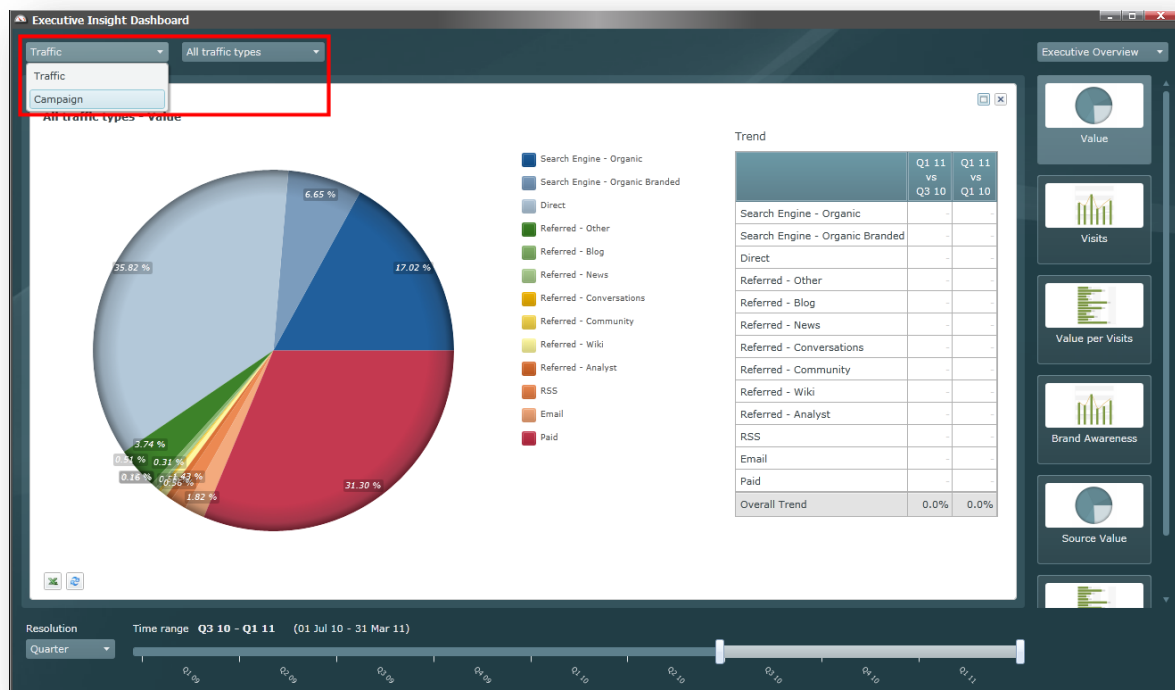
## 2.2.2 Dashboard Type

There are three dashboard types:

- **Executive Overview** – This dashboard display a summary of results and trends.

- **First Impression** – The First Impression dashboard provides more detailed charts to support the Executive Overview dashboard. The *Referring Sites*, *Search Keywords* and *Entry Pages* charts illustrate the correlation between the expectations of the visitor, the first webpage they viewed and the overall value of their visit.

- **Engagement** – The Engagement dashboard analyzes what happened during the visit, and how this affected results. For example, goals, conversions and assets consumed.

*Executive Overview Dashboard Categories:*
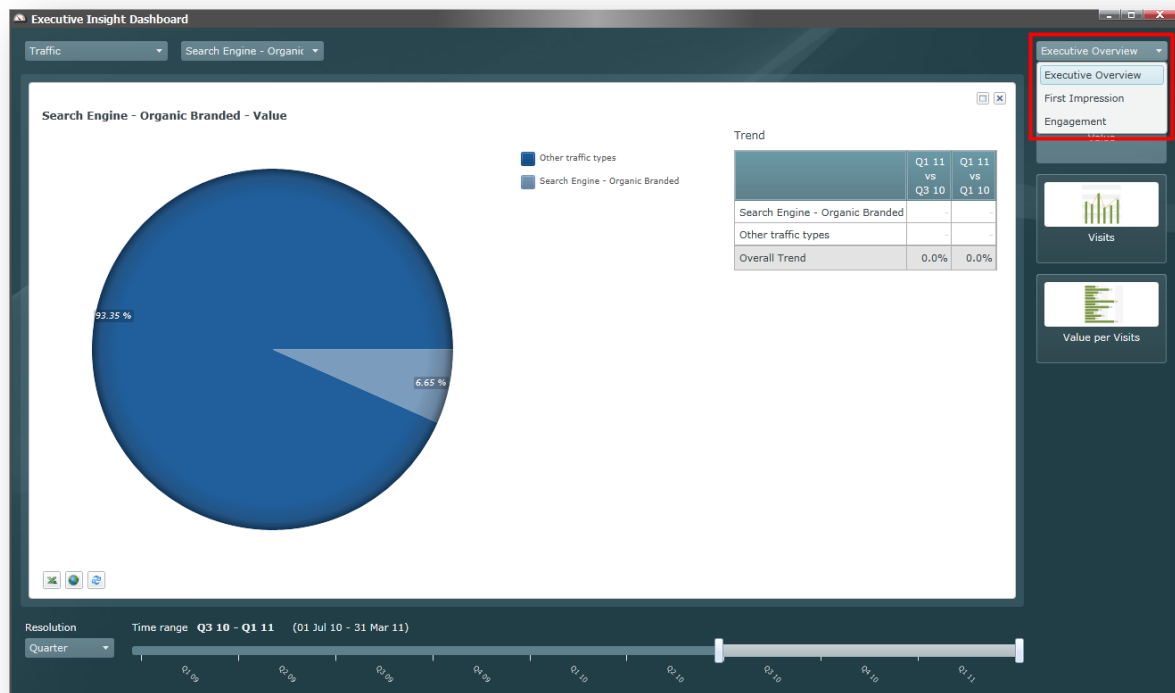
### 2.2.3 Chart Type

Chart types vary depending on which dashboard type you choose.

*The Referring Sites chart for the Search Engine - Organic traffic type:*
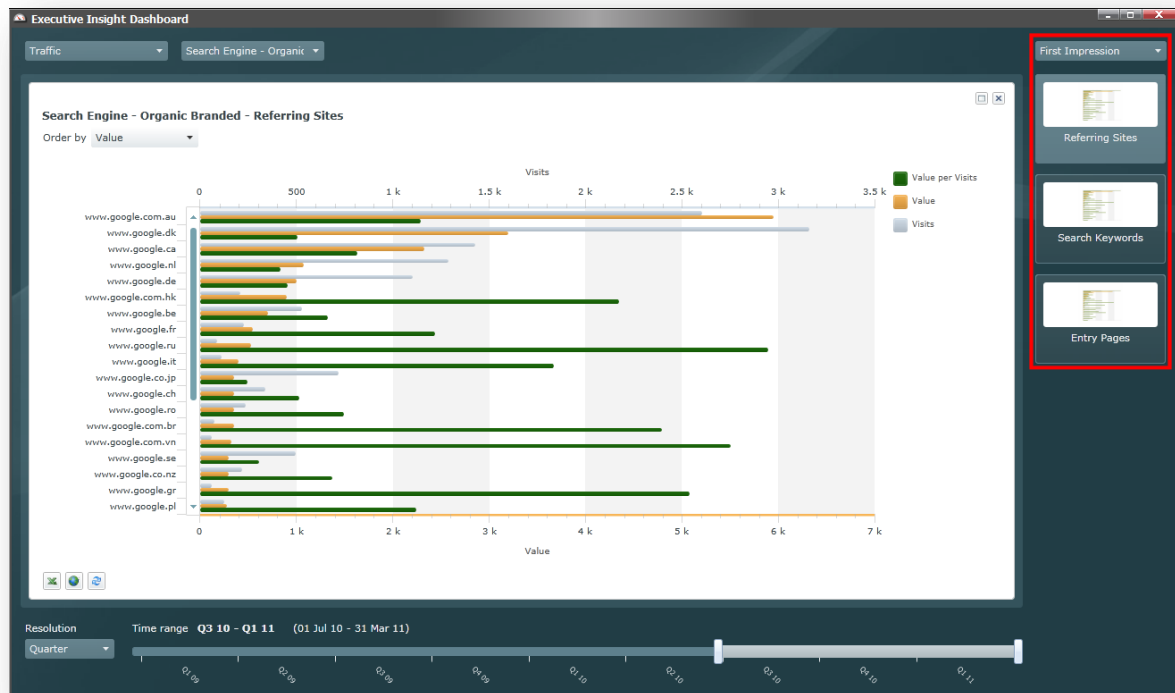


### 2.2.4 Timeline/Resolution Filters

You can filter dashboards by time period using the timeline control or by resolution using the drop down control. The options displayed in the Resolution drop down change dynamically depending on how much data is available:
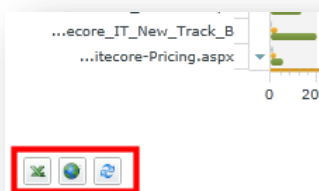
- Year
- Half Year
- Quarter
- Month
- Week

*Timeline and resolution filters:*
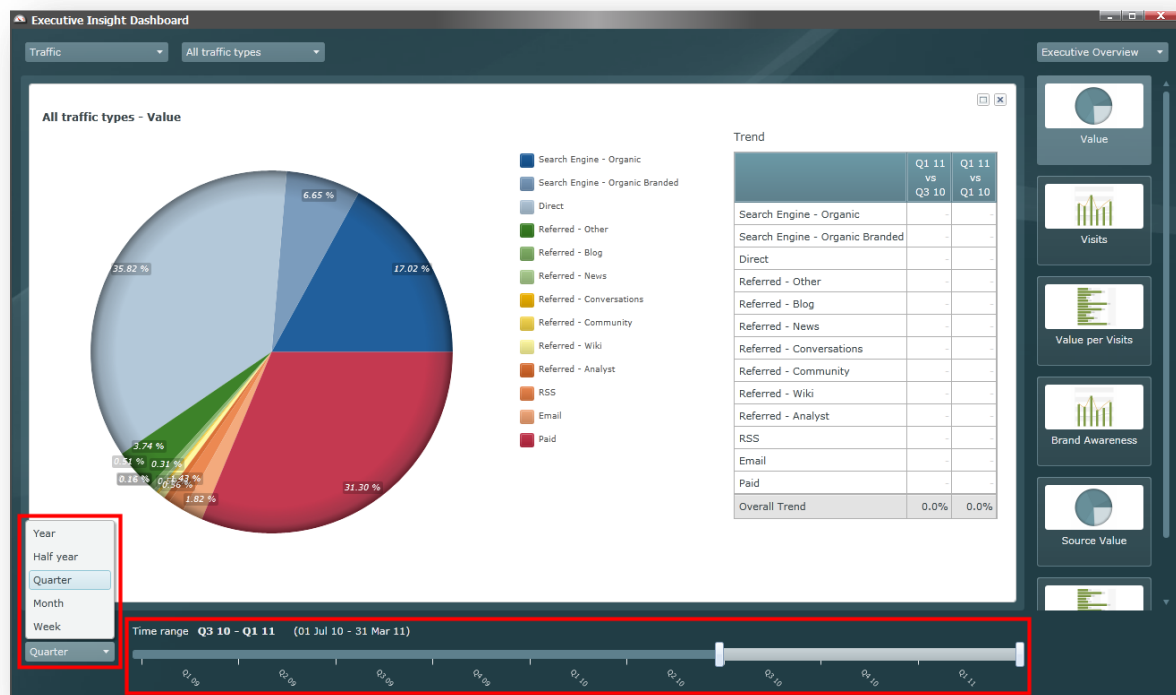


## 2.2.5    Advanced Features

Some dashboards have additional options:

- Classify Traffic Types
- Export to Excel Spreadsheet
- Reload Data
- Open Visit report

*Export to Excel, Open Visit report and Reload data buttons:*



The options available vary slightly depending on which dashboard or chart you are viewing.

# Chapter 3

# Dashboard Scenarios

This chapter presents several scenarios to illustrate how different marketers can use the Executive Insight Dashboard to solve key marketing problems.

- Overview

- Charts for Chief Marketing Executives

- Charts for SEO Marketers

- Charts for Marketing Campaign Managers

## 3.1 Overview

This chapter explains how to use the Executive Insight Dashboard to get an overview of your different marketing activities.

It is for the following types of marketers:

- Chief Marketing Officers (CMOs) – Interested in general charts that provide an overview of all marketing activities.

- Marketing Campaign Managers – Responsible for managing campaigns. Interested in charts that give an overview of the performance of different campaigns.

- SEO Marketers – Responsible for search engine optimization. Interested in charts that show which keywords and landing pages have the most impact on a website.

This chapter does not attempt to cover all the dashboards and charts that are available but instead tries to illustrate how to solve some typical problems faced by marketers.

With an understanding of Engagement Analytics and how to use the Executive Insight Dashboard you can get a clearer picture of all your marketing activities enabling you to make more informed decisions about how to allocate your marketing resources. In the Executive Insight Dashboard you can immediately see the impact of your marketing decisions on your website enabling you to fine tune your strategies more accurately.

## 3.2　Charts for Chief Marketing Executives

In the Executive Insight Dashboard there are several *Executive Overview* charts that enable CMOs to spot trends in the performance of their traffic types and campaigns. In this section we focus on three key *Executive Overview* charts:

- Value

- Visits

- Value per Visits

Using Engagement Analytics and the Executive Insight Dashboard it is possible for chief marketing executives to see at a glance where and how they could improve the marketing effectiveness of their website.

### 3.2.1　Assessing the Overall Marketing Effectiveness of your Website

**Scenario**

CMOs want to know which charts in the Executive Dashboard show how successful their web marketing activities have been and if necessary where and how to make changes to improve future marketing activities.

**Value Chart**

In the Executive Dashboard select *Traffic*, *All traffic types*, select the *Executive Overview* dashboard and then select the *Value* chart.

*All Traffic Types Value Chart*
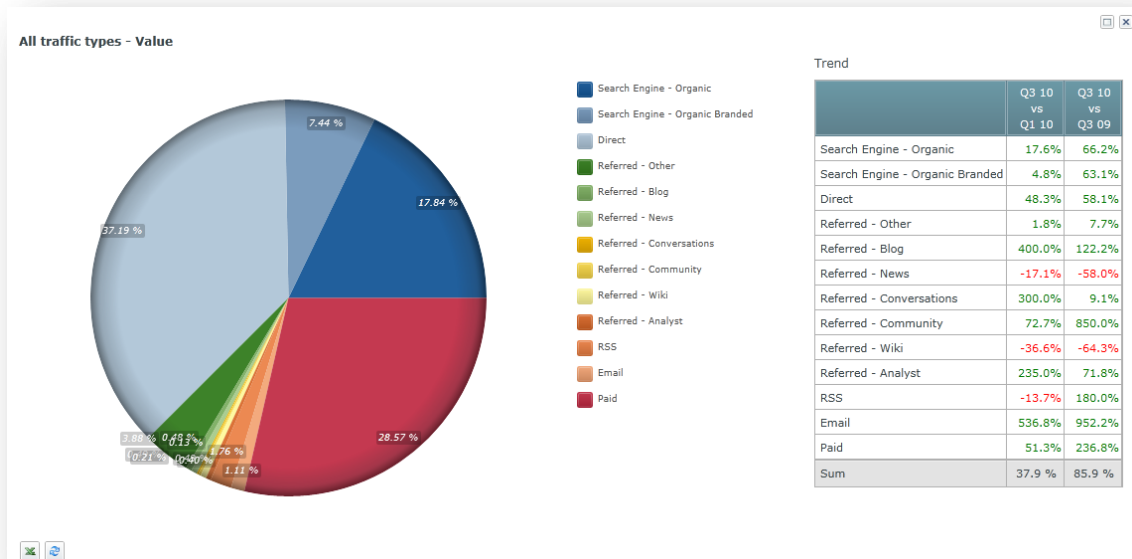


The *Value* chart enables a CMO marketer to see at a glance the marketing effectiveness of the website. Each segment in the pie chart represents the percentage value that each traffic type brings to the site.
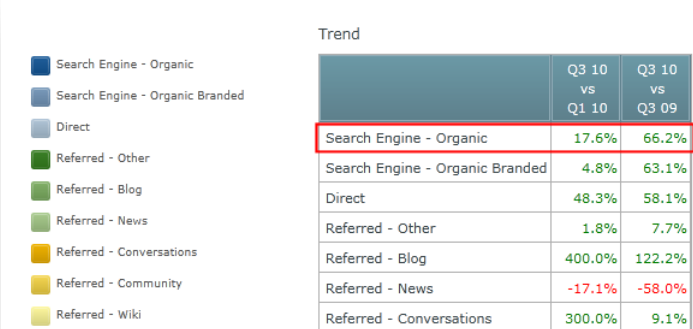
In this example, *Search Engine - Organic* accounts for 17.84 % of the total value on the website. This means that of all the points accumulated by visitors during the selected period 17.84 % came from

search engine searches using non-brand specific search terms. Double click any segment in the chart to drill-down into an individual traffic type.

The pie chart gives the CMO marketer a clear visual representation of the percentage value of each traffic type providing a quick overview of which marketing channels are performing well and which channels need more attention.

For example, the *Trend* table shows that *Search Engine - Organic* traffic is up by 66.2 % compared with data from a year ago and is up by 17.6 % if you compare it with traffic from the first quarter with traffic from the last quarter in the period selected.

*All Traffic Types - Trends*

| | Trend | |
|---|---|---|
| | Q3 10 vs Q1 10 | Q3 10 vs Q3 09 |
| Search Engine - Organic | 17.6% | 66.2% |
| Search Engine - Organic Branded | 4.8% | 63.1% |
| Direct | 48.3% | 58.1% |
| Referred - Other | 1.8% | 7.7% |
| Referred - Blog | 400.0% | 122.2% |
| Referred - News | -17.1% | -58.0% |
| Referred - Conversations | 300.0% | 9.1% |

Legend: Search Engine - Organic, Search Engine - Organic Branded, Direct, Referred - Other, Referred - Blog, Referred - News, Referred - Conversations, Referred - Community, Referred - Wiki

A CMO can quickly evaluate different marketing strategies by studying the percentages in the *Trend* table. In this example, the CMO views *All traffic types* but to get a similar overview of all marketing campaigns it is easy switch to view *All campaigns*.

## Visits Chart

Next select the *Visits* chart from the *Executive Overview* dashboard. In this example, you can compare website traffic for the first three quarters of 2010.

*All Traffic Types - Visits Chart*
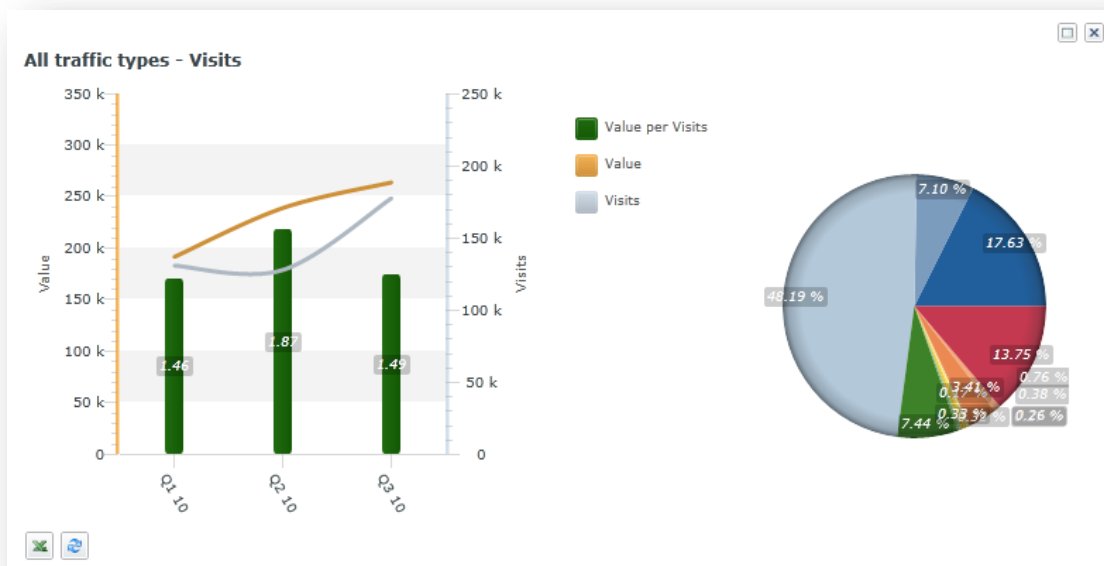


The *Visits* chart shows the *Value* (points accumulated), *Visits* (volume of traffic) and *Value per Visits* (relevance) of visits to your website for the quarters selected:

- The grey line shows the number of visitors for the selected period (traffic volume).

- The orange line shows the amount of points accumulated during the visit (engagement value).

- The green bars show relevance (value per visit)

You measure engagement value using engagement value points (EVP). Engagement value points are the total points accumulated by a visitor during a visit. Content Editors allocate points as a numeric value to goals on pages that show a high level of visitor commitment on your website. For example, if a visitor uses a form to register or to sign up for a newsletter, this triggers a goal which has a specific point value.

In the example chart, both lines show an upward trend over time but the orange line is increasing at a slower rate than the grey line. This shows that the overall marketing effectiveness (relevance of visits) for the website is decreasing.

The green bars measure relevance (value per visit). By looking at the green bars, you can tell straight away that the general trend for marketing effectiveness is down. Relevance is the most effective way to measure the marketing effectiveness of your website and is calculated using the following formula:

```
Relevance = Value/Visits
```

In this example, the *Visits* chart for *All Traffic Types* enables the marketer to see straight away that the total marketing effectiveness of the website is decreasing. The number of visitors coming to the site is going up but the overall value being delivered from each visit is going down.

## Value per Visits Chart

The *Value per Visits* chart enables you to assess the relevance or marketing effectiveness of visits to your website. The bar chart and table enables CMOs to easily spot trends that could help them to identify where changes could be made to improve performance. For example, if a department is under performing.

In this example, *Paid Ads* come second after *Referred - Analyst* and *Search Engine - Organic* traffic is a long way down the list. A CMO would expect *Paid Ads* to be at the top of the list and *Search Engine – Organic* traffic to be higher up. This might lead a CMO to conclude that the SEO department could work more effectively to optimize organic traffic and that some campaigns should be examined more closely to assess whether they are providing value for money.

*All Traffic Types - Value per Visits Chart*



If you select *Paid ads* for the first three quarters of 2010 in the *Value per Visit* bar chart, you can see in the *Trend* table that *Paid ads* have increased in relevance by 16.5 % compared with a year ago and are up by 73.3%.compared with the first quarter of the year.

For the same period, *Search Engine – Organic* traffic is up by 2.7% compared with the first quarter of 2010 and up by 57.1 compared with the same time the previous year. This would indicate to a CMO that the *Search Engine – Organic* marketing channel has performed reasonably well over the past year but may have not been performing so well in recent months.

The *Visits*, *Value* and *Value per Visits* charts indicate that the current marketing strategy may be attracting the wrong kind of visitors to the website or that the website is becoming less relevant to its target audience over time. A CMO can use the information to investigate the cause of the problem. The next step for a CMO might be to use the dashboard to assess the performance of an individual marketing channel or a specific campaign.

### 3.2.2 Assessing the Marketing Effectiveness of a Single Traffic Type

Examine a single traffic type to determine the effectiveness of this marketing channel.

**Scenario**

A CMO now wants to learn more about the effectiveness of each marketing department. To do this you can drill down into the individual segments in the traffic type *Value* chart. The CMO is particularly interested in the *Search Engine – Organic* traffic segment in the chart.
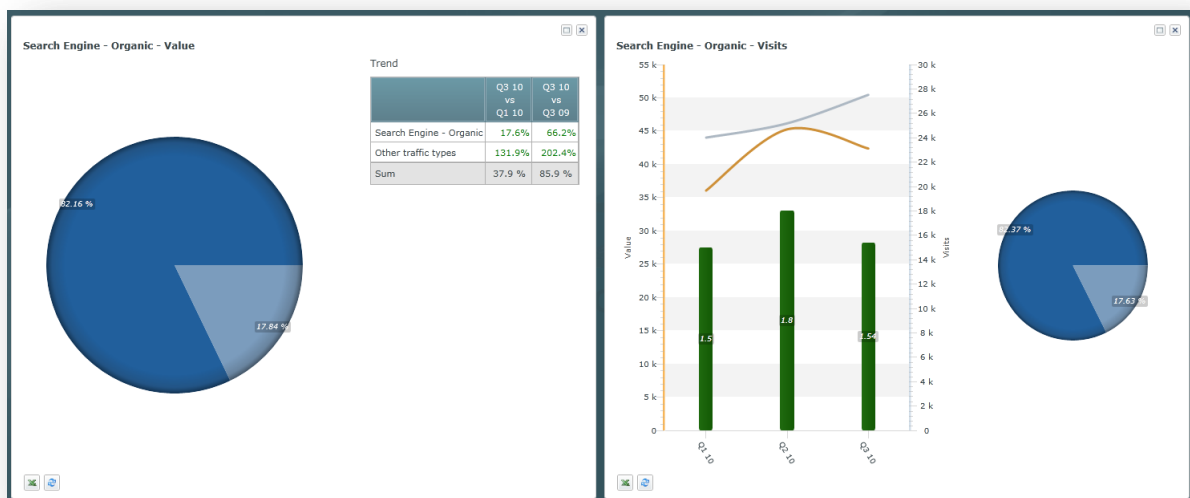
**Search Engine - Organic - Value and Visits Chart**

In the Executive Dashboard select *Traffic*, *Search Engine - Organic*.
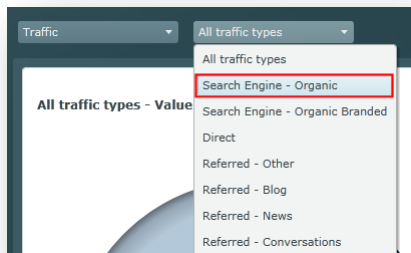


Select the *Executive Overview* dashboard type and view the *Value* and the *Visits* charts.
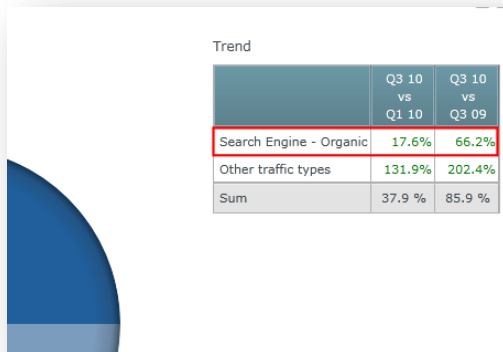
*Search Engine - Organic Value and Visits Charts:*



In *Resolution*, choose *Quarter* and then use the slider to select the first three quarters of 2010.

The *Search Engine - Organic* Value chart shows the percentage value of your chosen traffic type compared with all other traffic types available. In this example, you can see that *Search Engine - Organic* traffic contributes 17.84% of all points accumulated on the website for the period.

*The Trend table shows that this is higher than for the same period a year ago and compared with the first quarter of this period:*



The *Visits* chart shows that visits have increased for this traffic type but that the value and relevance of visits have not grown at the same rate. This would indicate to a CMO that the SEO department needs to investigate this trend further.

## Conclusions

The Executive Overview dashboard enables CMOs to see how much value each marketing channel brings to their website. They can spot trends and see at a glance which channels need closer attention. CMOs can use dashboard data to calculate more accurately how to allocate marketing resources in the future.

In this example, the *Value*, *Visits* and *Value per Visits* chart for *All Traffic Types* enable the CMO can see straight away that the total marketing effectiveness of the website is decreasing. The number of visitors coming to the site is going up but the overall value delivered per visit is going down.

The charts selected indicate that one marketing channel is not performing as well as it could. By drilling down into the *All traffic types*, *Value* chart the CMO can see that the *Search Engine - Organic* traffic type could perform better.

The CMO concludes that the SEO department needs to take action to improve the performance of *Search Engine - Organic* marketing channel.

## 3.3 Charts for SEO Marketers

SEO marketers are responsible for increasing and optimizing traffic from search engines. *Search Engine - Organic* traffic refers to searches that do not use brand specific key words in their search terms. For example, a search for best CMS is *Search Engine - Organic*, a search for Sitecore CMS is *Search Engine - Branded*. SEOs can optimize keywords and landing pages to make organic searches more relevant and produce more value. Branded searches need less optimization. For more definitions, see Traffic Types in Chapter 1.

In the Executive Insight Dashboard SEO marketers can view charts that show which search keywords, entry pages and referring sites have generated the most value over a specific period of time. Visitors using Bing are different from people using Google or Yahoo. Searching for the same term these demographic groups may exhibit significantly different behaviour. SEO marketers can optimize search engine keywords for different search engines and demographic groups with the aim of increasing the value and relevance of visits to their website.

### 3.3.1 Identifying Ways to Improve the SEO Strategy on your Website

In the Executive Insight Dashboard an SEO can view charts that provide an overview of the top referring sites, the most popular search keywords and highest value entry pages. SEOs can also sort these charts to show future potential.

This is not easy to do with other analytics tools but in Engagement Analytics you can use the dashboard to see straight away where the problem lies and take immediate action. An SEO can then use standard SEO tools to increase the importance of certain keywords or to promote more relevant entry pages. The SEO can then monitor and refine these improvements over time.

**Note**

To get the most benefit from the First Impression dashboard compare the Referring Sites, Keywords and Entry Pages charts with each other. These charts are designed to work together and provide most value when used in this way.

**Scenario**

After reviewing the Executive Overview dashboard, the CMO has decided that the SEO department needs to improve its performance. In the Executive Insight Dashboard SEO marketers have several charts they can view to help them to identify areas for improvement.

The SEO marketer wants to view charts in the dashboard that will enable him to identify where changes could be made to improve the performance of *Search Engine - Organic* traffic.

## Referring Sites Chart

Knowing which sites or search engines refer the highest value visitors to your website enable an SEO to segment visits into different traffic types or marketing channels. This enables SEOs to analyze the effectiveness of each marketing channel and to make the right decisions to improve overall SEO strategies.

In the Executive Insight Dashboard, in the dashboard data selection drop-down, select *Traffic* and then the *Organic Branded* traffic type. Select the *First Impression* dashboard type and then choose the *Referring Sites* chart.

*Referring Sites Chart – Order by Value*
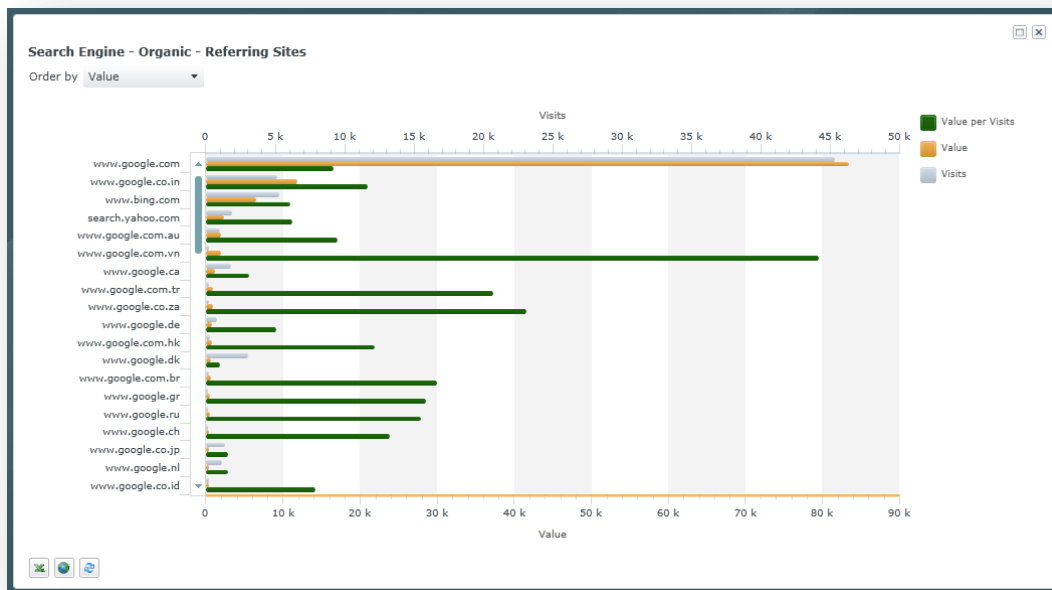


In this example the *Referring Sites* chart displays the most popular sites used to conduct organic searches. The list has *google.com* at the top with *Bing* in third place and *Yahoo* near the bottom. It shows that visitors are using different types of search engines to find your website and that the visits generating the most value are coming from *google.com*.

Move the mouse over the orange bar representing *google.com* to see a more detailed breakdown of the value per visits and potential generated from these visits.

*Referring Sites pop-up for google.com:*
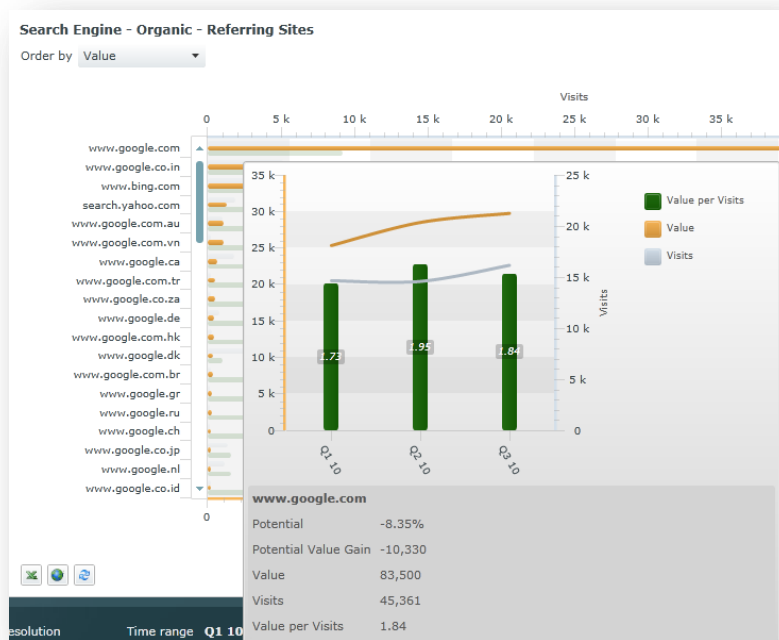


The pop-up shows *Value*, *Value per Visit* (Relevance) and *Visits* (volume of traffic). Below the chart you can also see *Potential* and *Potential Value Gain*. Potential enables you to see how much value you could gain in the future if you managed to increase the relevance to the same level as the site average. From this chart an SEO might decide that the current strategies, for example keyword optimization are working well for *google.com* but not for other search engines such as *Bing* and *Yahoo*.

Now move the mouse over *www.bing.com*. The pop-up chart shows that Bing is not referring as many visitors to your website as it could.

*Referring Sites pop-up for Bing.com*:
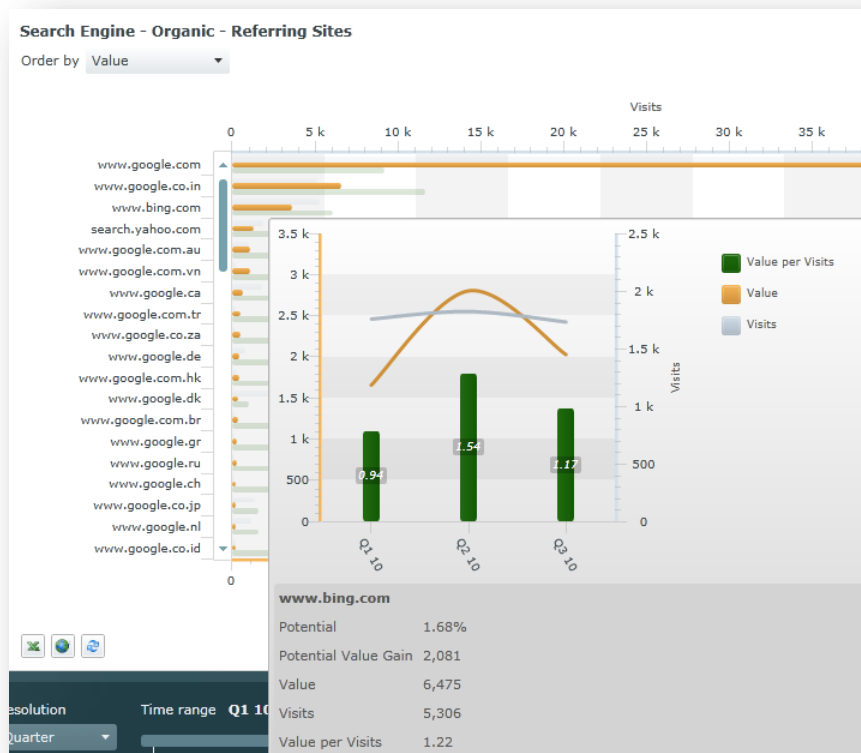


In the third quarter visits are consistently high but value is going down. *Bing* clearly has the potential to perform better.

If you order *Referring Sites* by *Potential* you can also see which search engines show the most future potential.

*Referring sites that show the most potential:*
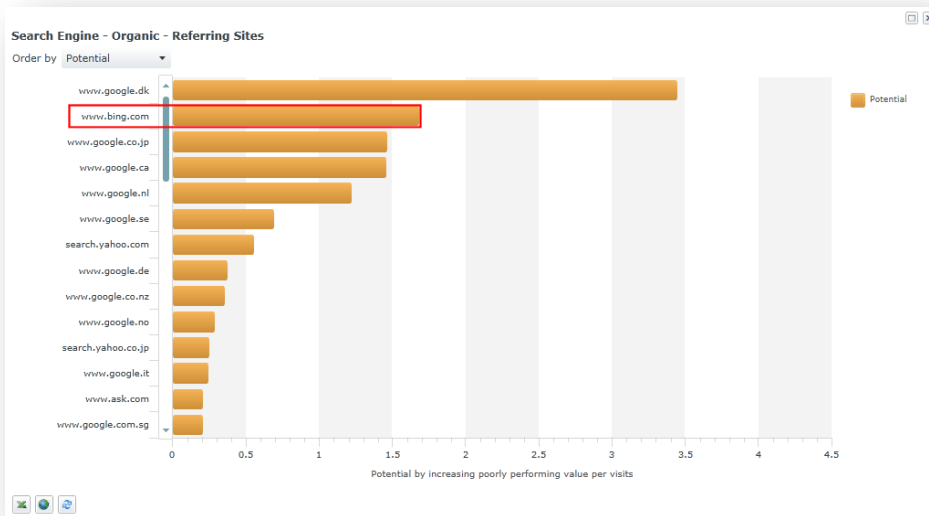


*Bing* appears second on the list after *www.google.dk*.

An SEO can see that by optimizing search keywords to make them more relevant to *www.bing.com* and *www.google.dk* could increase the volume and quality of traffic referred from these sites.

After reviewing all this information the SEO decides to take the appropriate steps to improve SEO strategies in relation to *google.dk* and *Bing*. The next step is to examine the keywords used on the website and which entry pages are most popular.

**Note**
If a referring site has not been classified it remains in the *Referred - Other* group. Some referring sites can be classified automatically while others must be manually classified using the dashboard. For more information about how to classify referring sites to traffic types, see Chapter 5, Classifying Traffic Types

## Search Keywords Chart

In the *First Impression* dashboard, select the *Search Keywords* chart for *Search Engine - Organic*.

The *Search Keywords* chart shows which keywords visitors chose to enter into a search engine when they were looking for your website and which keywords generate the most value on your website. You can sort this data by *Visits*, *Value per Visit* (*Relevance*) and *Potential.*

*Search Keywords - Search Engine – Organic Chart:*
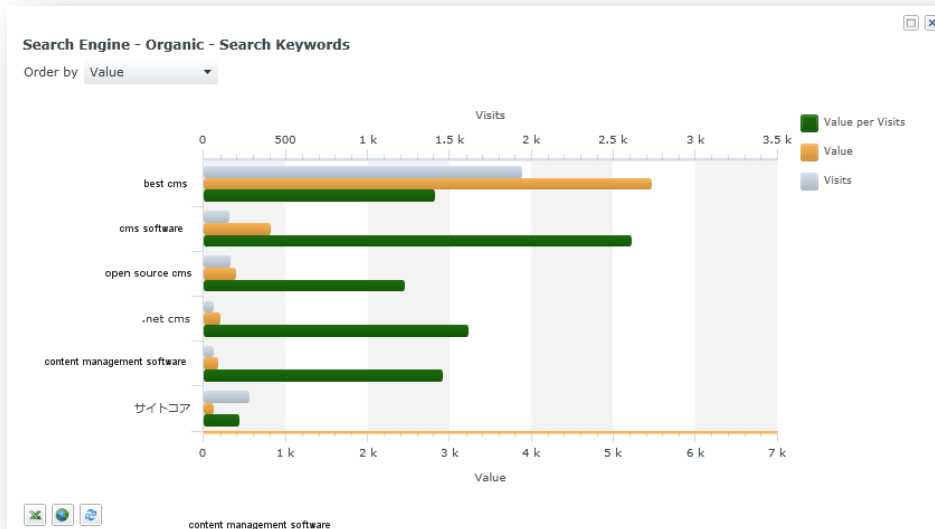


In this example, *Best CMS* was the most popular search keyword and generated the most value on the website. The search phrase *CMS software* generated the most relevant visits, followed by *.net cms* which generated a high level of relevance with a small number of visits. An SEO could click on the keyword *.net cms* to see which was the most popular search engine for visitors using this keyword and on which page they entered the website.

*Referring Sites and Entry pages for the keyword .net cms:*
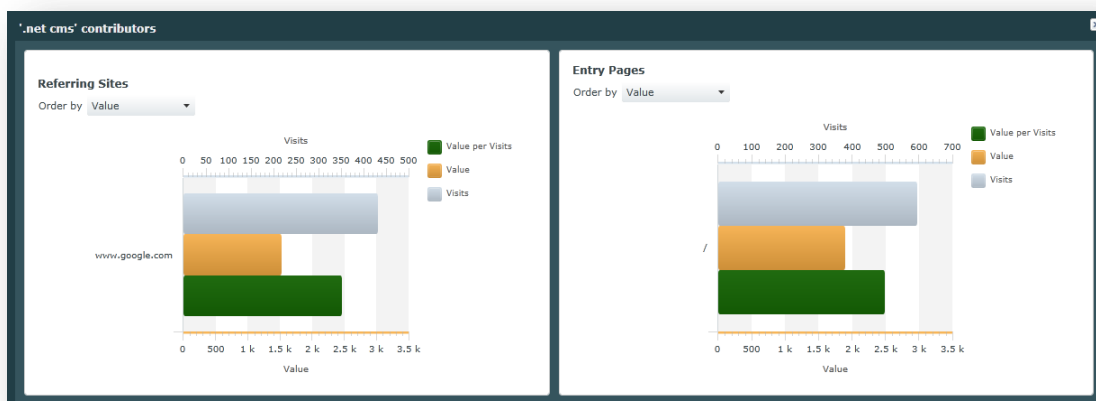


The *Referring Sites* chart shows that for the search term *.net cms, google.com* was the most popular search engine and the *Entry Pages* chart shows that most visitors entered the site on the home page.

This might indicate to an SEO that the current search keywords work well with *google.com* but are not optimized for use with search engines such as *Bing* or *Yahoo*.

An SEO might then also decide that the home page should not be the default landing page for visitors that use this search term. One improvements based on this information might be to create a new landing page tailored to the needs of visitors interested in the benefits of a .net cms.

*The Potential chart for Search Engine – Organic Search Keywords:*
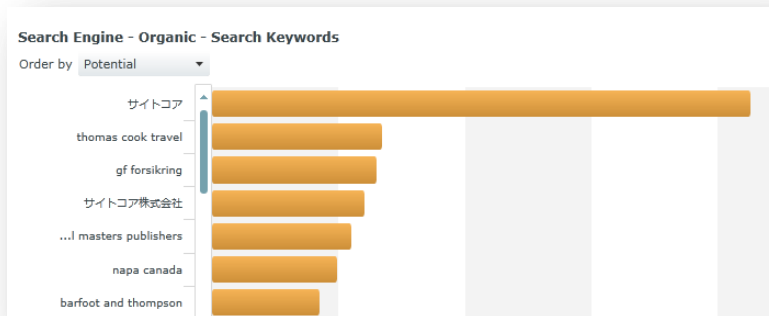


If you order the same data by potential you can see that the keyword with the most potential for organic searches is a Japanese search term. This search term is generating quite a high number of visits but is not leading to high levels of commitment from visitors to the website. An SEO could take steps to address this situation. For example, create more landing pages in Japanese and add more Japanese keywords relevant to visitors looking for these pages.

## Entry Pages Chart

Engagement Analytics can show you which entry pages are the most popular and which pages lead to the highest value visits on your website. This information could help you to increase the effectiveness of all pages on your website. Other analytics system cannot do this.

*The most popular entry pages for Search Engine – Organic traffic:*
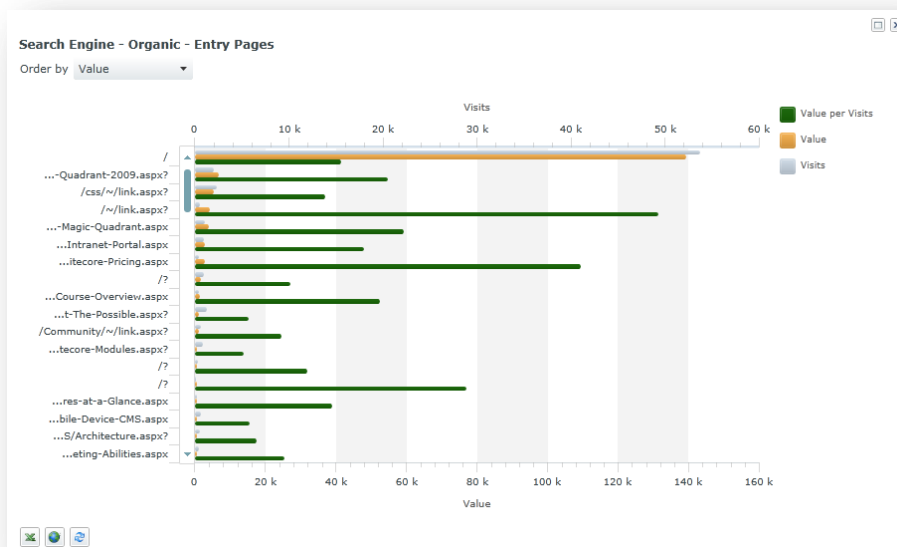


The home page of the website is the most popular entry page. Click on the bars representing the home page to see which websites referred the most traffic to the home page.

*Top referring sites for the home page:*
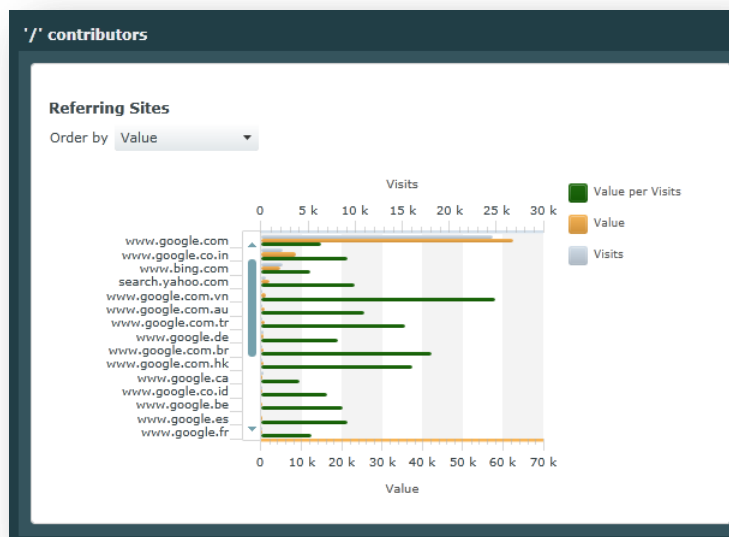


The search engine *www.google.com* is the biggest referrer, generating the most value per visit but not the most relevance. You can also see which keywords visitors used when searching for your site using *www.google.com*.

Sort *Entry Pages* by *Potential* to know which landing pages on your site could lead to high value visits in the future but which are currently under performing. This type of information could affect an SEO's keyword strategy.

*Entry pages that show the most potential:*
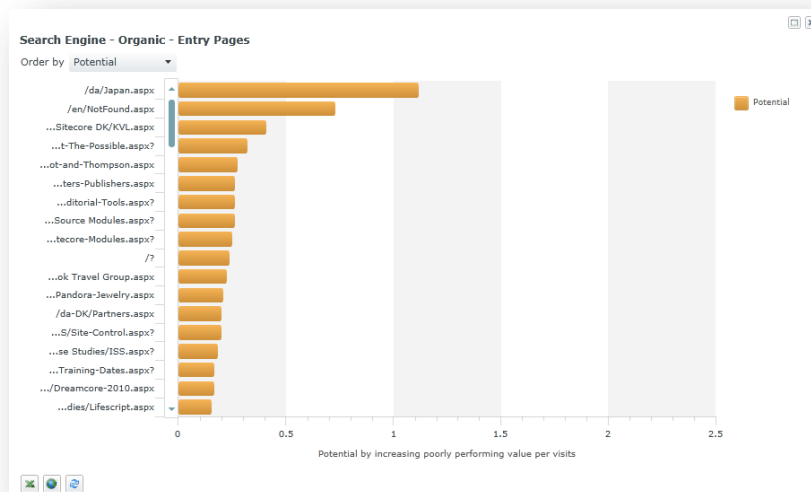


Click on one of the bars in the *Potential* chart to see a breakdown of referring sites and search keywords potential for the selected entry page.

*Detailed breakdown of the potential for the /da/Japan.aspx entry page:*
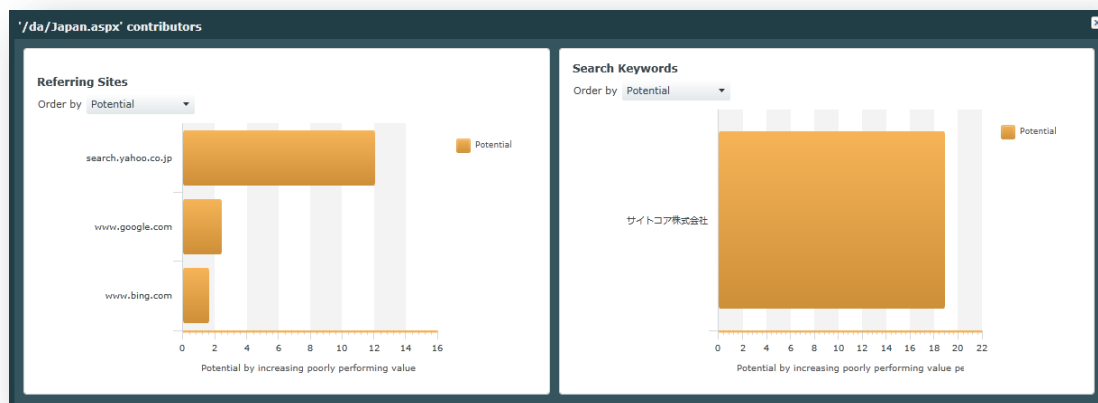


The potential chart shows that if an SEO optimizes search keywords more effectively for the Japanese language then in the future more Japanese visitors might be referred from *Bing* and *google.com*.

## Conclusions

Using the Executive Overview dashboard the CMO found that the SEO department was under performing.

When made aware of this problem, the SEO marketer examined this performance more closely using the *First Impression* charts in the dashboard to identify possible areas for improvement.

The *Referring Sites* charts, showed which search engines produced the most relevant search results and the highest values visitors. The *Potential* chart indicated which search engines could be targeted in the future.

The *Search Keywords* charts enabled the SEO to find out which keywords were the most effective with different referring sites and the *Potential* chart indicated which keywords should gain more prominence.

The *Entry Pages* charts showed which pages had the highest number of visits but also which entry pages led to the most engagement and commitment on the website.

After identifying these three areas for improvement the SEO could use standard tools to optimize keywords and to create new entry pages with the aim of attracting more high value visitors to the website. The Executive Insight Dashboard enables an SEO to monitor and refine these strategies over time ultimately leading to a higher level of marketing effectiveness on the website.

## 3.4 Charts for Marketing Campaign Managers

The Executive Insight Dashboard enables CMOs and campaign managers to get an overview of their marketing campaigns. Engagement Analytics campaign dashboards and charts not only provide information about which campaigns generate the most visitors but also which campaigns bring the highest value and most relevant visitors to your website.

CMOs can use this information to identify underperforming or failing campaigns and to inform their decisions on how to allocate valuable marketing funds and resources.

Campaign marketers responsible for specific campaigns can use the dashboard to drill-down into charts to examine the performance of individual campaigns so they can, if necessary adjust their campaign strategies.

### 3.4.1 Assessing the Performance of your Marketing Campaigns

To get an overview of campaign performance view charts in the *Executive Overview* dashboard.

**Scenario**

A CMO wants to get a high level overview of which campaigns are the most effective and provide the best overall return on investment.

**All Campaigns Dashboard**

In the Executive Insight Dashboard, select *All Campaigns* and then in *Executive Overview* dashboard, select the *Visits* chart for the first three quarters of 2010.

*Pie chart showing the performance of all campaign categories:*
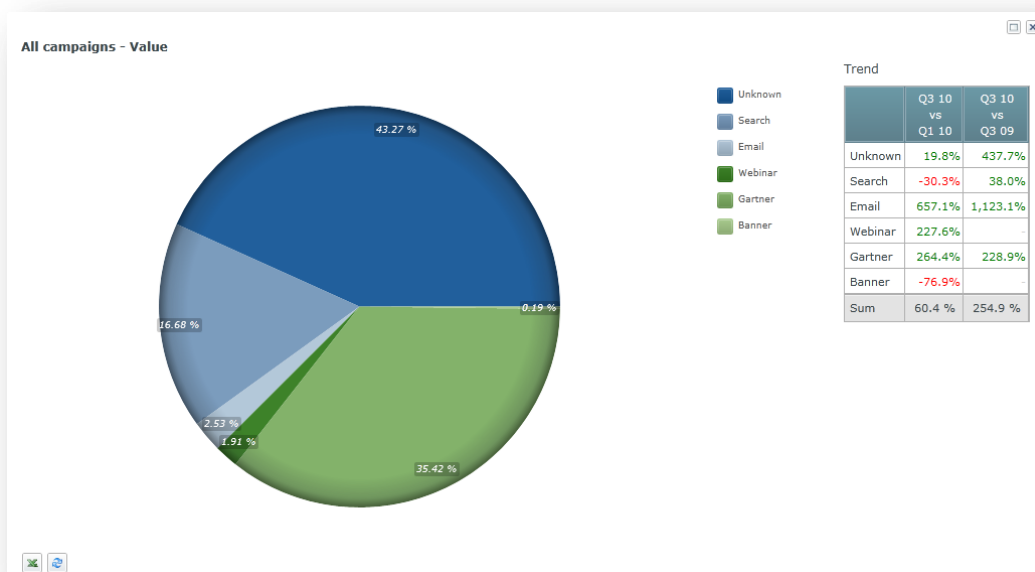


The *Visits* chart shows all campaign categories and a percentage value for each segment which represents the total engagement value that a specific campaign has generated on the website for the period selected. A CMO can see straight away which categories generate the most engagement value and can assess which campaign categories need further attention. For example, select the *Search* campaign category. The trend table shows that this campaign category has shown a 38 % increase over the past year but has dropped in value over the first three quarters of 2010. This might indicate to a CMO that the marketer responsible for this category should examine their campaigns more closely to find the cause of this sudden decrease.

*All campaigns trend table – Search campaigns:*



CMOs or campaign marketers can use the trend table or drill-down into specific campaign categories to discover more trends. For example, view all campaigns for the *Australia* region.

*Search campaigns – Australia category*:
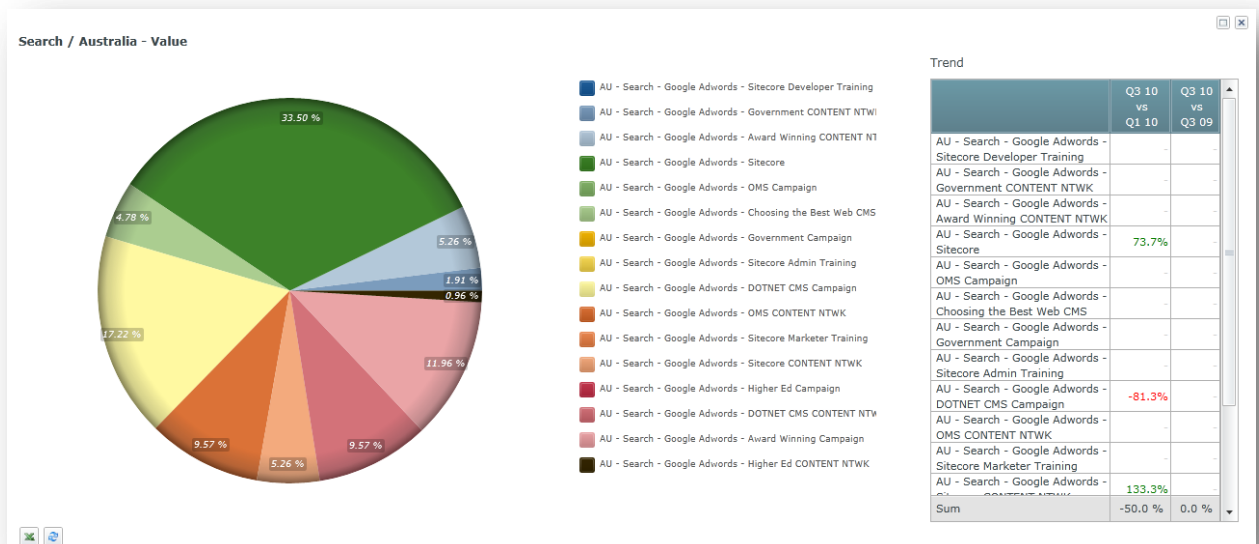


Using this chart a CMO can quickly get an overview of how Australian campaigns are performing and can identify any significant trends.

### 3.4.2 Assessing the Performance of an Individual Marketing Campaign

Marketing campaign managers need access to up to date dashboards and charts so they can identify successful campaigns, improve underperforming campaigns and end failing ones. Engagement Analytics enables campaign marketers to measure the marketing effectiveness of their campaigns not just the quantity of visits.

#### Scenario

A campaign marketer wants to drill-down into several different marketing campaign categories to get more detailed information on specific campaigns.

#### Campaigns Chart

In the Executive Insight Dashboard, select *All campaigns*, *First Impression* dashboard, *Campaigns* chart. Select all campaigns for the first three quarters of 2010.

*All campaigns ordered by Value:*
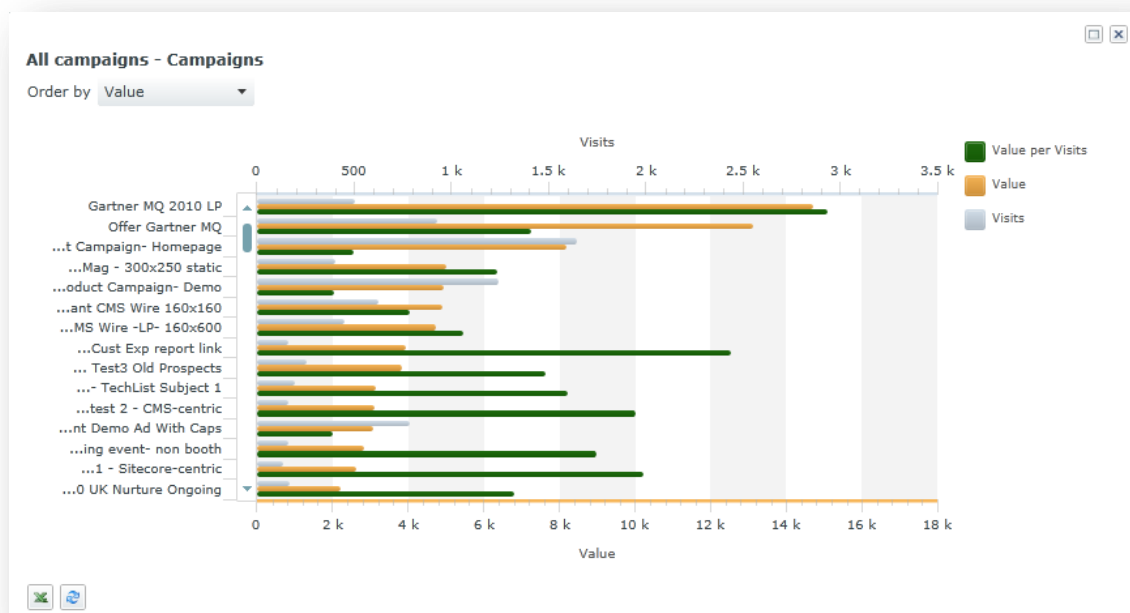


The *Campaigns* chart lists all campaigns by value. The name of each campaign appears on the left hand side of the bar chart. To see the full name of the campaign, move the mouse over the name. Three colored bars represent each campaign:

- Grey = Visits (total visits for the campaign)

- Orange = Value (total accumulation of points during the visit)

- Green = Value per visit (relevance – value/visits)

You can sort campaigns by each of these three values. This enables a campaign marketer to see quickly which campaigns have generated the most value, most visits, relevance and potential on your website for the selected period:

| Order by | Top Campaign | Description |
|---|---|---|
| Value | *Gartner MQ 2010 LP* | Generates the highest value on the website. |

| Order by | Top Campaign | Description |
|---|---|---|
| Visits | *INTL – Search – Google Adwords - Germany* | Generates the most visits on the website. |
| Value per visit | *Gartner MQ 2010 LP* | Visits with the highest relevance on the website. |
| Potential | *INTL – Search – Google Adwords - Germany* | Visits that show the most future potential on the website. |

## Pop-up Chart for a Single Campaign

To see a more detailed pop-up chart for an individual campaign, move the mouse over one of the three colored bars in the campaign chart. Click on the bars to see the *Entry Pages* chart for the selected campaign.

*CMS Matrix campaign Value chart:*
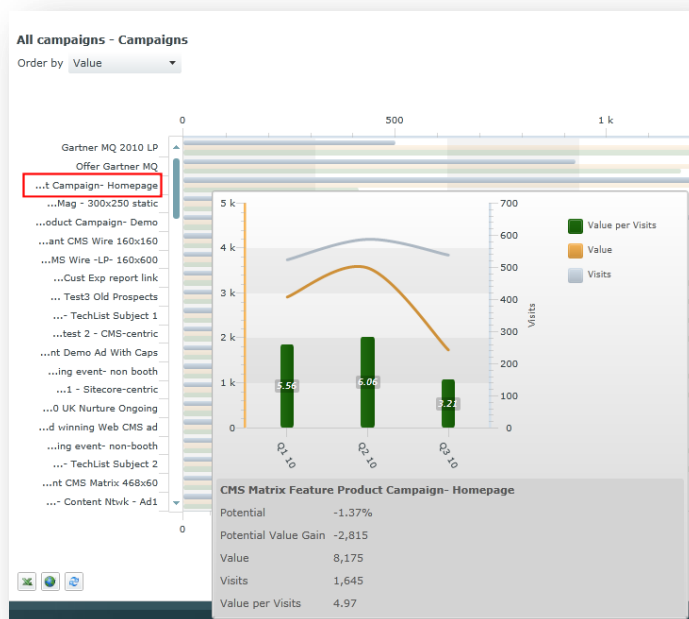


*CMS Matrix* is the top performing campaign that contains a complete set of data for all three quarters selected. However, the bar chart shows that the value and relevance of visits to this campaign peaked in the second quarter and then dropped in the third quarter. Potential for this campaign is currently low.

*NA – Search -Bing campaign Potential chart*:
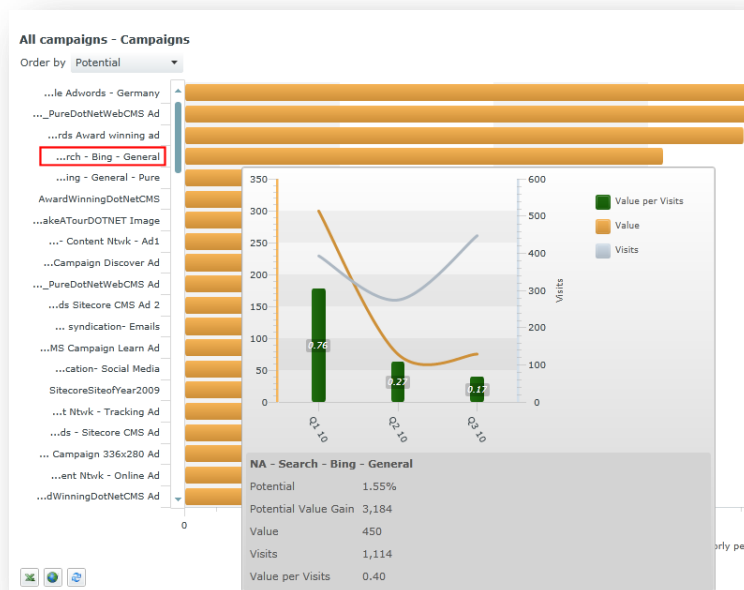


This campaign started well in the first quarter but displays a big drop in value and relevance in the second and third quarters. However, this chart shows that *Bing* has quite a lot of future potential. Despite increasing numbers of visitors, it appears that this campaign is not as effective as it could be. The campaign manager for Bing could increase the budget for this campaign and could develop new and more effective landing pages. It is then possible to measure the effectiveness of these changes in the dashboard.

## Conclusions

CMOs can select all campaigns to get a quick overview and then marketing staff can use the campaigns pop-up chart or drill-down to see how individual campaigns are performing.

The example data in this section shows which campaigns are currently the most popular but also shows that the same campaigns are decreasing in value over time. This means that you may not be attracting the right visitors to your website. You may need to adjust some campaigns to ensure that the visitors coming to your website show higher levels of commitment. For example, this might mean creating new campaigns or more effective landing pages.

You can also see which campaigns show the most future potential. This might indicate to CMOs which campaigns require the most investment and re-allocation of resources to maximize their full potential.

If a CMO or marketer can quickly identify trends like this it may be possible to make improvements or plan alternative marketing strategies before too much marketing budget is spent on the wrong campaigns.

# Chapter 4

## Additional Dashboard Functionality

This chapter includes the following sections:

- Refreshing Dashboard Data

- Exporting Dashboards to Microsoft Excel

- Opening the Visits Report from the Dashboard

- Classifying Traffic Types

- Assigning Brand Keywords

## 4.1 Refreshing Dashboard Data

To refresh a dashboard, click *Reload Data* and the page will reload to display any changes made since the last update to the dashboard. The server updates all dashboard data once a day.

For example, if you classified a number of traffic types you may need to reload the dashboard.

*Reload data control:*



The *Reload Data* button appears on all Dashboards and charts.

## 4.2 Exporting Dashboards to Microsoft Excel

To save a dashboard as an Excel spreadsheet:

1. Click the Excel icon in the bottom left of any dashboard. Every chart and graph in the dashboard has this option.

   *Export to Excel control:*
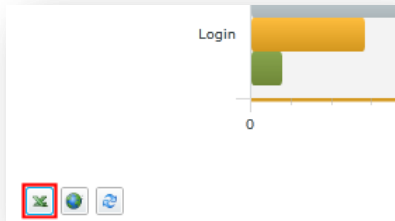
2. When you click **Export to Excel**, this opens a **Save As** dialog box. Choose a name and a location to save the Excel spreadsheet.

3. In the **Save As** dialog box, click **Save**.

   Open the saved chart or graph in Microsoft Excel.

   *Excel spreadsheet showing goal conversions for the Search Engine - Organic traffic type:*
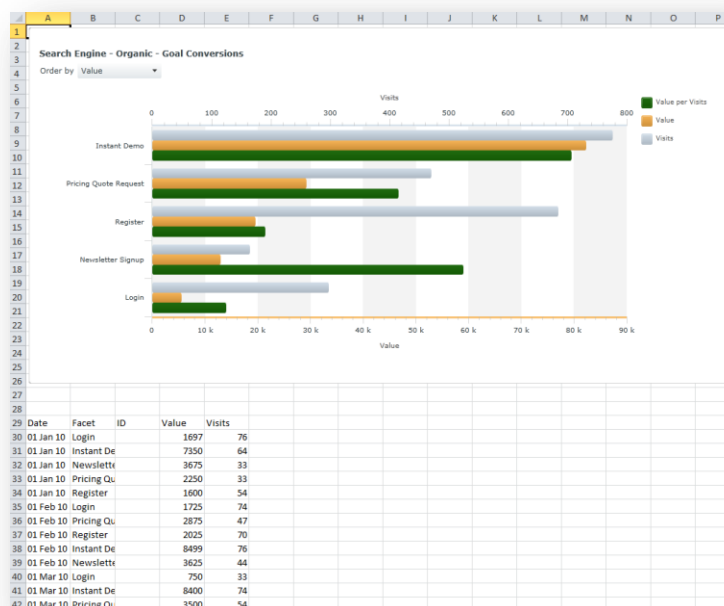
## 4.3 Opening the Visits Report from the Dashboard

You can open the Engagement Analytics, *Visits* report from the Executive Insight Dashboard. The dashboard gives you a high level overview of your campaigns and your marketing channels but *Engagement Analytics* reports give you more detailed information. For example, you can drill-down to the *Visit Detail* report which provides you with session trail information for every visitor and every session on the website.

To open the *Visits* report:

1. Click on the **Open Visit report** globe icon in the bottom left of any traffic dashboard.
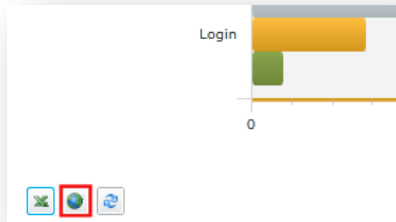


The Stimulsoft Visits report opens in a new window.
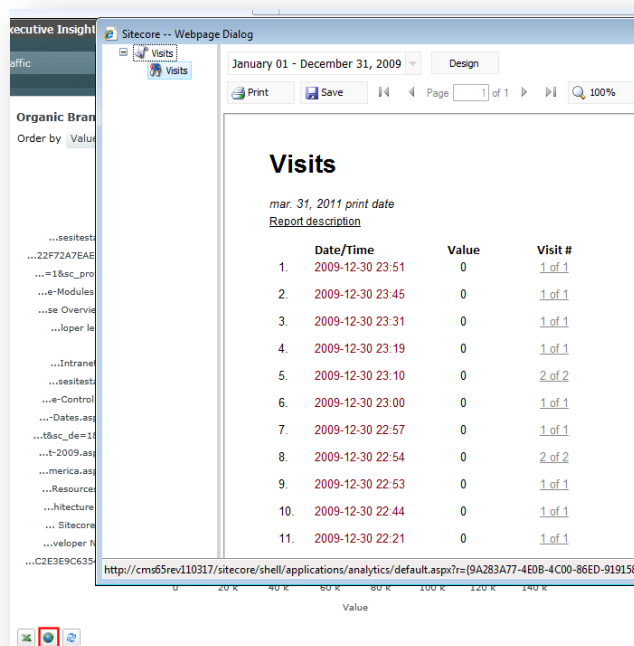


2. Click any link in the **Visits** report to drill-down for more detailed information. In this example, click the timestamp to view the **Visit Detail** report for a single visit.

**Note**
The Executive Insight Dashboard only displays links to Stimulsoft reports from the Traffic Type dashboard.

## 4.4　Classifying Traffic Types

The Executive Insight Dashboard segments visits into traffic types so that it easier to assess the performance of your various marketing channels. Select *All traffic types*, *First Impression* dashboard, *Referring Sites* chart to display a list of referring sites.
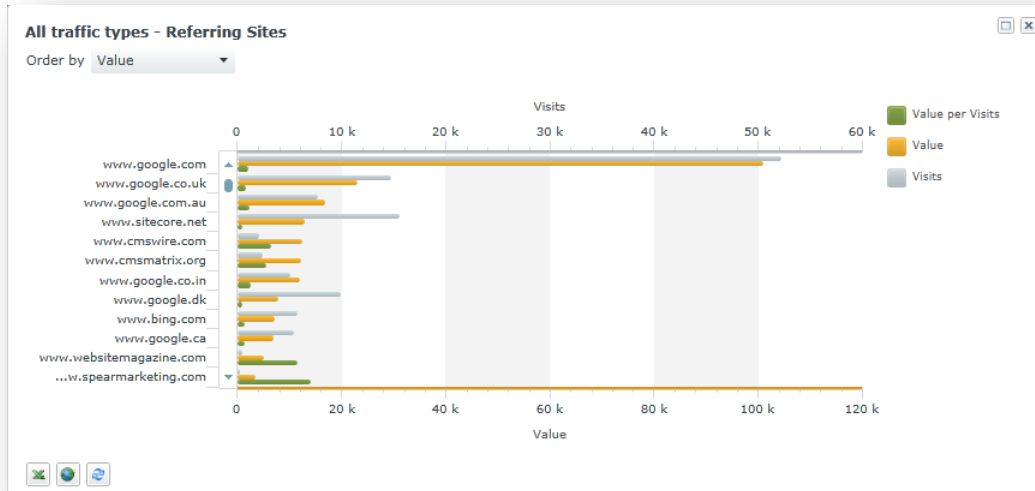


**Note**

The Referring Sites chart is only available on Search Engine - Organic and all referring traffic types.
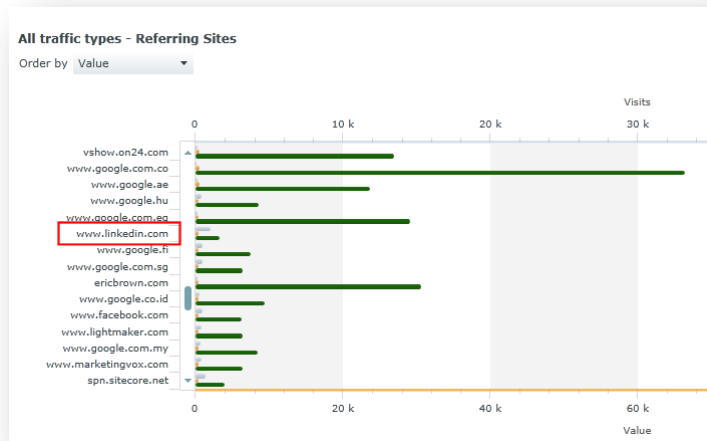
Click the name of a referring site to see which category it belongs to.
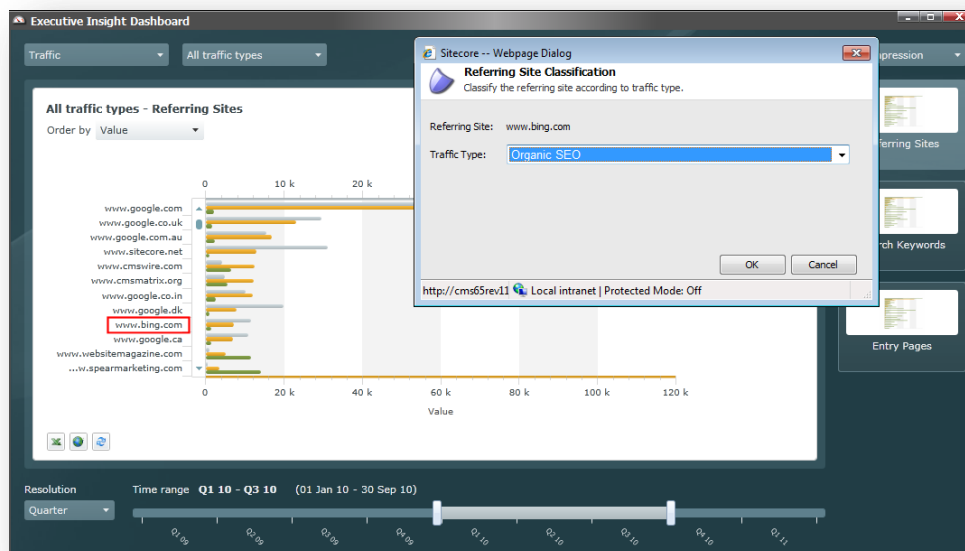


An SEO marketer needs to classify all visits that appear in the *Referred – Other* category to make the dashboard data more meaningful.

Some of these websites are easy to classify. For example, a visit from *fr.mg.yahoo.mail.com* is clearly the *Referred Email* traffic type. A referral from *google.com.qa* might be *Search Engine – Organic* or *Search Engine - Branded*. However, some referred visits are not so easy to categorize. If it is not

possible to classify a visit straight away it is put in the *Referring Sites – Other* category until you are able to re-classify it.

To classify or re-classify a visit:

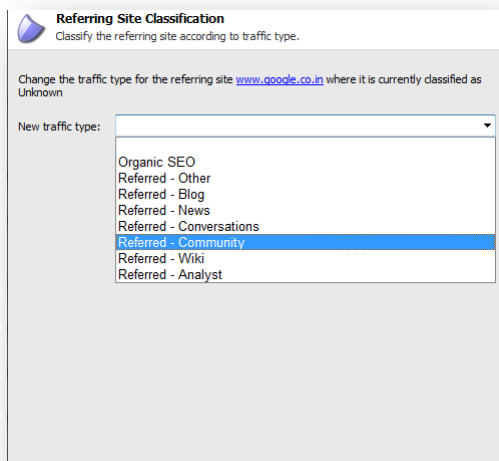1. In the Executive Insight Dashboard, open *Referring Sites*.



In the *Referring Sites* chart you can see a list of referring websites. In this example, classify *www.linkedin.com*.

2. To classify a referring website, click the name of the referring site to open the **Referring Site Classification** dialog box.

To determine the correct traffic type you may need to view the referring website. Viewing the referring site will help you to determine whether the category is a *Referred - Blog*, *Referred News*, *Referred - Community* or something else that does not fit into any of the predefined categories (other).

3. When you have decided on the correct category, make a selection in the drop-down in the **Referring Site Classification** dialog box.



Classify *www.linkedin.com* as Referred - Community.

4. Click **OK**. In the future all visitors coming from *www.linkedin.com* are classified as *Referred - Community*.

## 4.5    Assigning Brand Keywords

The Executive Insight Dashboard uses search keywords to identify whether a search engine search is organic or branded. A branded search uses a product or company specific name. In the dashboard, SEO marketers can enter their own brand keywords.

The *First Impression* dashboard, *Search Keywords* chart displays a list of the most popular keywords used to search for your website.

To enter a new brand keyword:

1.  In the Executive Insight Dashboard, open *Search Keywords*.

2.  Click one of the words in the list of keywords in the left axis of S*earch Keywords*.

3.  In the **Brand Keywords** dialog box, enter a brand keyword, for example *Sitecore*.
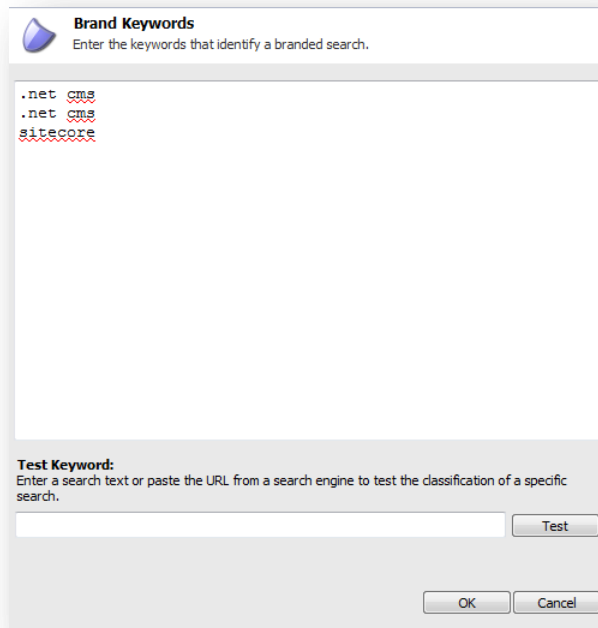


4.  Click **OK**.

    In future searches, if a visitor includes the word *Sitecore* in their search engine search this site will be assigned to the *Search Engine – Branded* traffic type.

# Chapter 5

## Appendix

This Appendix contains additional useful information that it was not possible to include in the main document.

- List of all Dashboards

## 5.1 List of all Dashboards

### 5.1.1 Executive Overview

**Traffic**

| | Value | Visits | Value / Visits | Brand Awareness | Source value | Source Value /Visits |
|---|---|---|---|---|---|---|
| All traffic types | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Search Engine - Organic | ✔ | ✔ | ✔ | | | |
| Search Engine - Branded | ✔ | ✔ | ✔ | | | |
| Direct | ✔ | ✔ | ✔ | | | |
| Referred-Other | ✔ | ✔ | ✔ | | | |
| Referred-Blog | ✔ | ✔ | ✔ | | | |
| Referred-News | ✔ | ✔ | ✔ | | | |
| Referred-Conversations | ✔ | ✔ | ✔ | | | |
| Referred-Community | ✔ | ✔ | ✔ | | | |
| Referred-Wiki | ✔ | ✔ | ✔ | | | |
| Referred-Analyst | ✔ | ✔ | ✔ | | | |
| Rss | ✔ | ✔ | ✔ | | | |
| Email | ✔ | ✔ | ✔ | | | |
| Paid | ✔ | ✔ | ✔ | | | |

**Campaigns**

| | Value | Visits | Value / Visits |
|---|---|---|---|
| All campaign categories | ✔ | ✔ | ✔ |
| Specific campaign category | ✔ | ✔ | ✔ |

## 5.1.2 First Impression

**Traffic**

| | Search keywords | Entry pages | Referring site |
|---|:---:|:---:|:---:|
| All traffic types | ✔ | ✔ | ✔ |
| Search Engine - Organic | ✔ | ✔ | ✔ |
| Search Engine - Branded | ✔ | ✔ | ✔ |
| Direct | | | ✔ |
| Referred-Other | | ✔ | ✔ |
| Referred-Blog | | ✔ | ✔ |
| Referred-News | | ✔ | ✔ |
| Referred-Conversations | | ✔ | ✔ |
| Referred-Community | | ✔ | ✔ |
| Referred-Wiki | | ✔ | ✔ |
| Referred-Analyst | | ✔ | ✔ |
| Rss | | ✔ | |
| Email | | ✔ | |
| Paid | | ✔ | ✔ |

**Campaigns**

| | Referring Sites | Campaigns | Search Keywords | Entry pages |
|---|:---:|:---:|:---:|:---:|
| All campaign categories | ✔ | ✔ | ✔ | ✔ |
| Specific campaign category | ✔ | ✔ | ✔ | ✔ |

### 5.1.3 Engagement Traffic

**Traffic**

| | Site search | Assets consumed | Goal conversion |
|---|---|---|---|
| All traffic types | ✔ | ✔ | ✔ |
| Search Engine - Organic | ✔ | ✔ | ✔ |
| Search Engine - Branded | ✔ | ✔ | ✔ |
| Direct | ✔ | ✔ | ✔ |
| Referred-Other | ✔ | ✔ | ✔ |
| Referred-Blog | ✔ | ✔ | ✔ |
| Referred-News | ✔ | ✔ | ✔ |
| Referred-Conversations | ✔ | ✔ | ✔ |
| Referred-Community | ✔ | ✔ | ✔ |
| Referred-Wiki | ✔ | ✔ | ✔ |
| Referred-Analyst | ✔ | ✔ | ✔ |
| Rss | ✔ | ✔ | ✔ |
| Email | ✔ | ✔ | ✔ |
| Paid | ✔ | ✔ | ✔ |

**Campaigns**

| | Site search | Assets consumed | Goal conversion |
|---|---|---|---|
| All campaign categories | ✔ | ✔ | ✔ |
| Specific campaign category | ✔ | ✔ | ✔ |