



Site Functional Description

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1 Foreword

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3 Site Solution

Site is about:

- knowing your website visitor by tracking him, and this for all your individual visitors
- offering the right content to your website visitor

3.1 KNOWING YOUR WEBSITE VISITOR

If someone visits your website, do you know what he's viewing? Which section of your website he visits? Or which article or product he clicked? How often does he visit your website? And when? During the week or only in the weekends? How long does he stay at each visit? And this across all your websites? Does he visit your different websites, or just one? On a tablet or smartphone?

With Site you can **identify** these visitors, store their actions and build profiles over time. Not only views and clicks, also JavaScript values (product names, categories ...) are stored and linked to the visitor's profile.

Use purchase history, visit frequency, interests, device type, and other data to define profiles. Is he a first-time visitor? An active buyer? Interested in a certain product? A mobile or desktop user? Visits on Saturday? Came to your website through Google search or an affiliate?

Combine all this with information you already have from the Engage platform: subscribed to the newsletter, has a loyalty card, is a woman or a man, between 20 and 30 years old.

To achieve this, Site tags web pages. Visitors of these pages are tracked, and profiles are built. These can be anonymous profiles but also **profiles that are identified at logon or via a click through in an email. They can be linked to Campaign/Engage contacts** and followed on multiple devices.

Historic behavior of currently unknown visitors can easily be linked to your CRM data once they are identified. But Site also provides **custom identification** where the customer assigns a custom id to the visitor.

3.2 OFFER THE RIGHT CONTENT

Now that you know your website visitors, why not offer them specific content related to their profile? Define areas on your website, combine banners, web page content, pop-ups and pop-ins, and fill them with content relevant to a specific profile.

If he is a first-time buyer, why not try to stimulate a second purchase? Fill the areas with content to highlight your free delivery service. Or perhaps you have a discount voucher for new customers?

In Site this concept is called an 'Offer' and consists of 4 parts, the "who, what, why and when": the offer's audience (who: first time buyer), the offer content (what: free delivery) and your offer goal (why: stimulate a second purchase). The "when" is always the time frame when to show the offer.

Include Engage journeys to create content for your offers. For instance, a journey handling the newsletter opt-in, which is shown in a pop-in on the website. Or send a follow up email to visitors who accepted your offer (converted profiles) or a 'retargeting' email detailing the offer again to visitors who didn't accept your offer within a certain time frame (not converted profiles).

The goal is to get visitors converted and to improve your ROI. Online marketing budgets can be used more effectively and when a person is targeted with messages he is interested in, he is more likely to click-through. Conversion rates increase tremendously when sending targeted messages. With Site, rich behavioral profiles

can finally be turned into actionable data that enables a personalized digital experience by ensuring consistent offers over all devices and all channels.

4 Plug and Play installation

Site is available in SAAS, in a multi-tenant environment. No physical installation is required. Marigold is in charge of the continuous update of the Site environment.

An online help and API documentation provides all the information required to configure your environment from A to Z: placing scripts on your website, configuring, and managing tags, building profiles, creating segments, offers and exports.

5 Tracking with tags

Site provides a series of **system tags** that are used to track the behavior of the visitor on the website. These system tags provide already a wide range of data. They include information on how the visitor arrived on the website, which device was used, what search terms he applied, at what day of week, part of the day he arrived, etc.

These system tags can be completed with **custom tags**. Site allows a lot of freedom in how these custom tags are defined. Up to **25** tags can be created with a limit of 65000 tag values per tag. **Hierarchical** tags allow going five levels deep. By adding a hierarchy to tags it is possible to retrieve exactly where the visitor was on the website.

The importance of a measure may **decrease** over time. For instance, if a visitor was highly interested in a certain product in the past but hasn't been lately, that tag value will become less important and decreases over time. Site allows setting a decrease percentage applied per day, week, or month.

Indicate the importance of revisits by counting multiple visits to the same page in the same browsing session only once or each time the page is visited. Do you want to consider the history or only keep the most recent information? This can be set for each tag individually and allows attributing different levels of importance to different tags.

Tag specific **reporting** is available with graphs, tables and word clouds providing details on the popularity of tags, how tags perform compared to other tags, how tag values are distributed, etc.

6 Audience Segments

While tags allow tracking the behavior, Reporting segments give insight into your website visitor. They are calculated once a day.

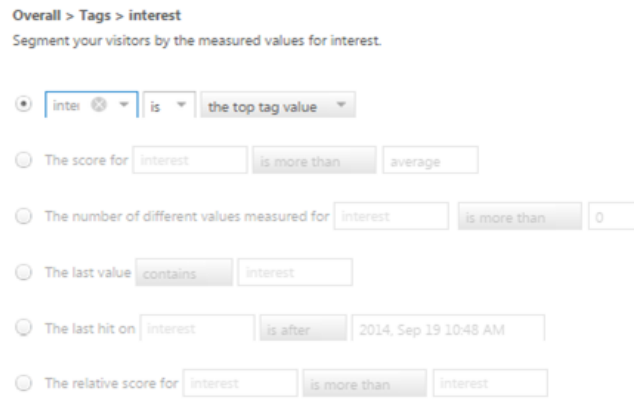
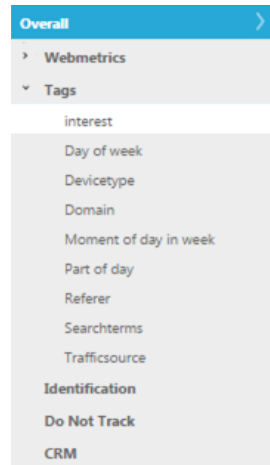
Reporting segments are based on a large set of attributes, including historic profile information or session related information, depending if you are interested in his **long-term** behavior on your website or his **session** related behaviour.

Historic profile information may include the overall profile behavior measured on the website, such as frequency, engagement, recency, traffic sources and devices; all tags defined in the Site environment (e.g. part of the day last visited, number of different values measured for device type); identification info (e.g. is he custom or CRM identified, date of identification), 'Do not track' option in the browser, CRM data.

Session information may include the profile's behavior within the session (e.g., Total visit time, device being used); all tags defined in the universe limited to the current session; website URL verification (e.g., test for numeric and text parameters and other elements added to the web address).

An easy-to-use interface allows creating the constraints a segment is built from. Numerous checks can be made on all data available. The user is guided by means of clear descriptions and easy to understand conditions. Segments can even be created based on other segments!

Up to **50** different segments can be created.



A **dashboard** provides an overview of all segments and insight in the number of profiles currently in a segment.

For ease of use, segments can be copied to recreate new ones and segments that are of particular interest can be pinned and displayed on the Home page.

Dedicated **reporting** is available.

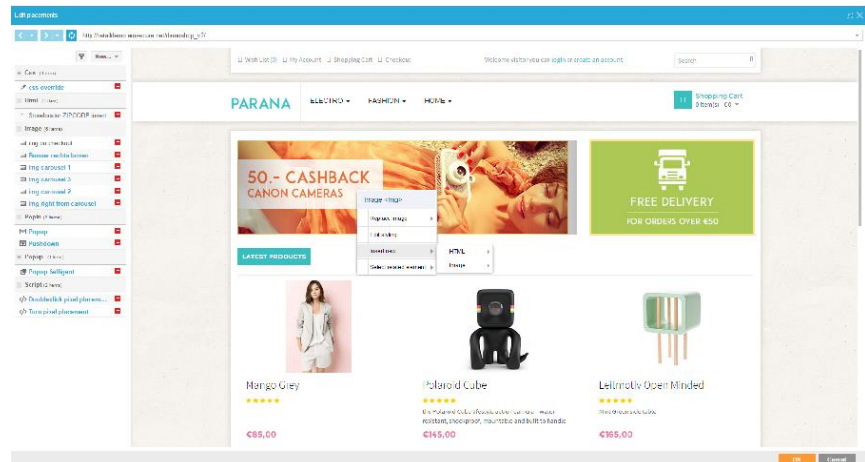
Segments can be **exported** to Campaign/Engage where a dedicated profile extension is created. This means that this information can easily be used in journeys, to target and retarget contacts and to complete the CRM profile with behavioral data.

7 Target and remarket visitors with personalized offers

When a visitor navigates the website, you want to steer him in a certain direction or offer him content based on his interest or surfing behavior. Provide offers or specific content based on all the information you have from Site and Campaign/Engage. You can choose who gets to see what, when and where. An easy-to-use interface is at your disposal.

Define where offers need to be displayed on your website with a one-time definition of **placements**. A graphical website browser allows setting where content is to be displayed and if new content is added, or existing content replaced. Popins, popups, images, html, headlines, links, etc can all be used, and specific styling can be applied to these elements.

Placements can be set as **interruptive** which will limit the number of times it will be shown in a certain time frame.



Placements can be re-used by multiple offers and limited to certain websites only.

Up to 50 offers can be defined and they can be prioritized by simple drag and drop.

Define **who** gets to see the offer by setting an audience. The same powerful audience builder is available as for segments and information from Site as well as from Campaign/Engage can be used. Offer audiences can be saved as Reporting segments as well. The offer audience is not only built from constraints in Site. Campaign/Engage contacts can be added to the Offer audience through one or more journeys.

Next is the content of your offer. **What** exactly should be displayed? Propose a discount on male clothes when the visitor consults the male clothing section. Or offer a loyalty card after a first purchase. Give away free tickets to 'Cocoon' when people visit the mortgage page. Display a rotating promotion for cars...

Multiple actions can be defined for each offer. Moreover, these actions can be **personalized**, using all data available in Site! Display a personalized image carousel in the header, while at the same time inciting the visitor to subscribe in a popup.

And there is more! The content of these offers can come from various **sources**, from Site itself, from a journey (for instance a subscription form), a Recommendations Smart Content or external URLs.

Content can be straightforward but can also be **rotated** with different levels of importance for the different elements. Or diverse content is tested, and the **best version** will be shown to the remainder of the visitors.

A **timing** can be set to display actions only after a certain time, to hide them again, to limit the number of times it can be displayed in time or per visitor, etc.

Last, a **preview** can be launched to test the offer before it goes live. Not happy, make changes and view again.

What do you want to achieve with an offer? When is a visitor converted? If the offer is meant to stimulate a second purchase, conversion is reached when the visitor purchases again. Or, when you try to get the visitor subscribed and he fills out the subscription form for instance. By setting the **objectives** on an offer, follow up is available and non-converted visitors can be retargeted from within Campaign/Engage and converted visitors marketed with emails, SMS, call, etc.

It even goes one step further when the different activities of the visitor on the website are measured before reaching the goal. **Funnel reports** give insight in where visitors abandoned before reaching conversion.

The **'when'** is as important as the content and audience of an offer. Offers are often only valid within a specific time frame. No use displaying discounts when the promotion is no longer valid or when the visitor is not interested in the product. Or offers may only be triggered on specific days or on weekdays only after working hours. The planning tool of Site sets when exactly the offer is to be executed. Capping will limit the execution of the offer in time, per visitor or after a minimum number of conversions has been reached. If the purpose of the offer was to convert, the offer should be hidden for converted visitors. Many options are at hand to plan exactly when the offer is to be displayed or when it should no longer be active.

Extend the reach of your online offers into other marketing channels, like your traditional CRM channels (email, SMS, mobile push, direct mail, call center...) or display advertising.

After conversion or by lack of conversion, you can automatically push Site identified profiles into journeys in Campaign/ Engage to retarget them via any type of outbound communication.

Besides that, you can send audience segments, offer audiences or only non-converted profiles to your DSP or via data onboarding to target them with display advertising on external media.

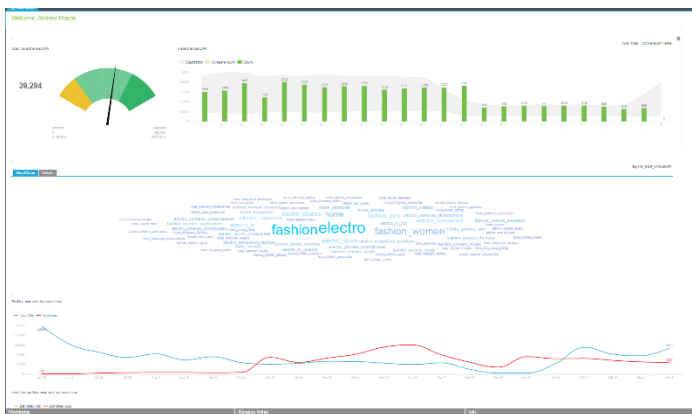
8 Abandoned Carts

Site provides the possibility to use cart information on your website in Site and follow up on visitors that have or have not abandoned their cart. With Campaign/Engage journeys, you can target these users or send a reminder with the details of his cart.

Moreover, by creating segments of visitors based on their cart details you can easily include these visitors in dedicated offers. For instance, show a specific offer of a related product in the cart or offer an extra discount when the cart remains untouched for more than 24 hours.

9 Reporting capabilities

9.1 DASHBOARD



A dashboard provides the user with instant information and reports he is interested in. The content of the dashboard is personalized: from all reports available in Site, the user can select the ones he is interested in and pin these on the dashboard. The layout can be altered, reports can be moved around or removed again from the dashboard.

9.2 REPORTS

Numerous reports are available out of the box.

Real-time reports give insight on what is happening on your website for the last 24 hours: How many visitors are there? What is the prime time of my visits? Are people responding to my offers? What are my visitors most interested in?

In addition, **visitor insight** reports, give you details on your audience. Is my audience growing or decreasing? At what pace? How old are my profiles? How active are these profiles and are they online? How many profiles do not want to be tracked? What is the average visit frequency? How many pages does a profile visit on average? Who spends most time on a page? What sources bring the most traffic to the website? What devices are used and how many visitors are being tracked over multiple devices?

Offer specific reports tell you how your offers are doing? Do visitors respond? Do they convert? What is the most successful action in my offer? Who puts items in his basket?

Although these reports are predefined, the user has a degree of liberty to make **comparisons** for these reports between anonymous and identified profiles, to change the time frame of a report, include or exclude active profiles, to limit numbers to certain segments, etc. In addition, preferred views can be set in the configuration of Site.

Reports include graphs, table views, Word clouds.

10 Data Export

Site information can easily be exported, to Campaign/Engage or to files that can easily be used in external systems (such as CRM, analytics, DSP). An export to Campaign/ Engage generates a profile extension for the audience list.

Exports are typically used to enrich your CRM database with behavioral data or to feed profile IDs into third party advertising engines.

Tag, segment and offer data can all be exported. What is exported exactly is completely configurable. For each export, the audience can be set as well as the attributes. Limit the export of profiles to only those in a specific segment for instance. What tags, profile attributes or offer information must be included? DNT options? Identification information? Reporting segment information such as profiles included and enter dates, etc.

Up to 5 exports can be defined. An export can be launched automatically or manually. Exports can be planned for execution within a defined time frame, or continuously.

11 Bi-directional integration with Campaign/ Engage

Thanks to a one-time integration setup, Campaign/ Engage and Site data can be exploited to a maximum in both environments making the most of all data gathered.

Data from Campaign/Engage audiences can be used in Site, for audience segmentation as well as for personalization of offers. Pages in Campaign/ Engage can be retrieved to set the content for an offer.

But it also works the other way round. All data gathered in Site is available in Campaign/ Engage and can be used there as well for personalization, to create audience segments or to steer campaigns.

Moreover, journeys can be completely integrated with Site. This implies that for instance when visitors are not converted, you are able to retarget these profiles, with an email, a call, a letter, etc. But also converted visitors can be followed up. You can send them a 'Welcome' or 'Thank you' messages for instance.

12 Dedicated Site API

Site provides the possibility to exploit Site data on your website for tracking and targeting by means of an API. Customize your website based on Site data by using your own CMS system.

Define yourself the profile info you want to expose via the API and secure the information by using encryption.