



CrownPeak Web Content Optimizer

Version 0.93

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WCO Overview

Web Content Optimizer provides multiple ways to test content, capture form data, and target content to specific users.

CrownPeak subscribers that have any of the following needs, should consider leveraging WCO:

- Targeting and content optimization
- A/B and multi-variant testing
- Form building and processing
- Call to action and conversion links
- Real-time analytics and reporting
- Backend third-party integrations

WCO provides features that enable content teams to effectively leverage their investment in CrownPeak to meet these challenges.

WCO Benefits

WCO delivers content dynamically at runtime based on a criteria (user profile, ambient information). This allows WCO to provide the following capabilities and benefits:

- Target and Content Optimization
 - Snippet of content and content changes are delivered to visitors
 - Allow users to give visitors content that is relevant to them
 - For example, can target by city, visitor city is provided to WCO, and WCO provides the content for the specific location
- A/B and Multi-Variant Testing
 - Marketers can try out different marketing ideas by varying content for different groups
 - For example, can vary content given to Group A vs Group B
- Intuitive Content Management Controls
 - WYSIWYG controls to create various states or variance of content.
- Form Building
 - WCO form builder wizard with predefined and creation of custom forms.
- Integrations via Connectors built into WCO. Once data is submitted, it can be sent to a number of systems such as:
 - Social Media (Google, LinkedIn, Facebook)
 - CRM (Salesforce)

Business Process Guides for WCO Configuration

WCO can be configured to support many different processes. Before starting the configuration, it is beneficial to

solidify the scope of the configuration.

Identify the Business Needs for WCO

Processing forms

- Email the form data
- Relay the form data to a 3rd party

Testing and targeting

- What segments or target groups do you want to target?
- What are the targeting rules?
- Do you want to collect call to action / conversion link analytics?
- Do you want integrate with a third party service?

Using backend third party integrations

- Send data to 3rd party services
- Collecting data from 3rd party services to be used for targeting
- Integrating with third party services:
 - Salesforce (CRM)
 - MS Dynamics (CRM)
 - Eloqua (MAP)
 - Marketo (MAP)
 - SilverPop (MAP)
 - ExactTarget (MAP)
 - DemandBase (Real Time Identity Provider)
 - Custom backend

Integrating aspects of WCO

- Personalization Services
- Targeting and Content Optimization

Configuring WCO

Once the Business Process is understood, configuring WCO will be structured in the following way:

- Ensure hosting infrastructure has WCO enabled for instance
- Create a Jira Ticket by sending an email to *support@crowpeak.com*
- Add in the body of the email the following:
 - Instance name
 - Question to verify if WCO is enabled for the instance
- Ensure the dashboard has been enabled for the instance.
- Submit a Jira Ticket to Engineering requesting for dashboard set up.
- Setup the required templates with WCO required controls
 - Notify professional services team with the specific requirements
- Once integration requirements are fully captured and understood, work with Engineering to define and build new connectors.
- Once the configuration is complete, CrownPeak will conduct user training as a part of User Acceptance testing.
- CrownPeak will review WCO in the context of the business process, confirming the proper operations for:
 - Personalization Services
 - Targeting and Content Optimization
 - Any issues or additional changes requested will be processed as a part of the final configuration tuning.

Once the User Acceptance Testing is completed, normal operations will commence, the configuration project will end, and operations will be supported by CrownPeak's Absolute Service team.

Enabling a WCO Snippet in the Input Template

Add the following code to Textboxes, Text-Areas, and WYSIWYGs

Text-Areas

```
Input.ShowWcoControls("fieldTextBox");
```

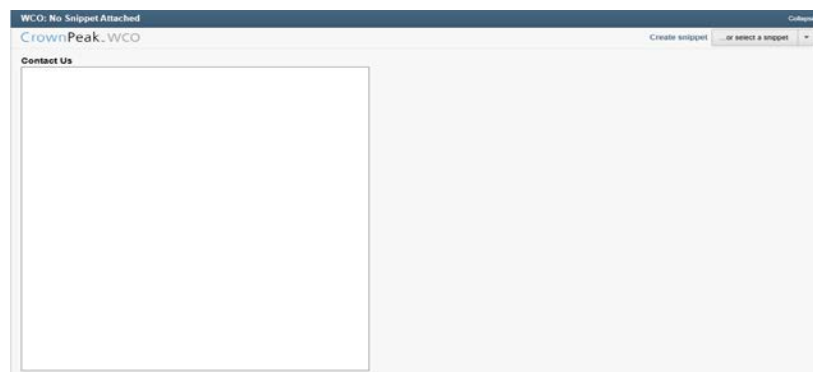
```
Input.ShowTextBox("Field", "fieldTextBox");
```

WYSIWYG

```
Input.ShowWcoControls("fieldWysiwyg");
```

```
Wysiwyg wparam = new WysiwygParams();
```

```
Input.ShowWysiwyg("Field", "fieldWysiwyg", wParams);
```

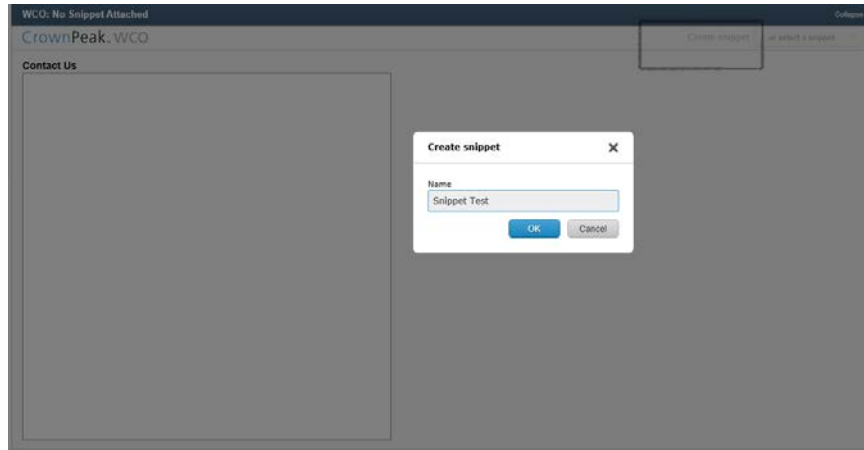


No Snippet Attached

Using WCO in the CMS

Setting up a snippet

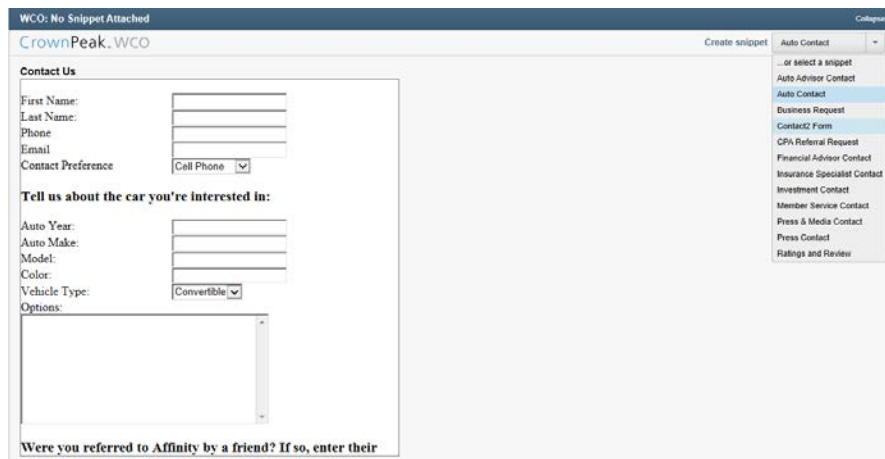
1. Select **Create Snippet** from the input control and enter a Snippet Name.



Create snippet

Attaching an existing snippet

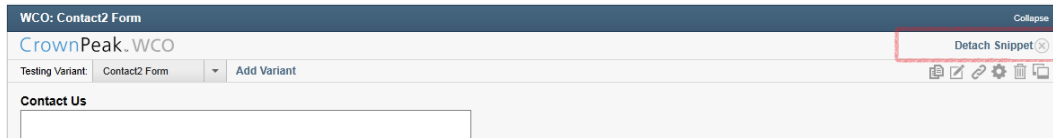
1. Select the drop-down to see a list of all available snippets.
2. Select the snippet of choice to attach.



Attach a snippet

Detaching an existing snippet

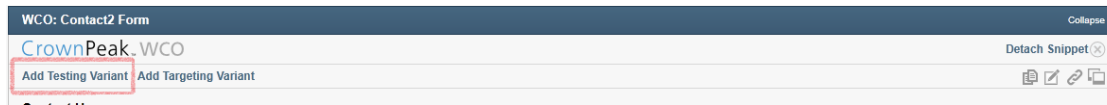
Click the **Detach Snippet** button in the WCO toolbar.



Detach Snippet

Setting up a Testing Variant

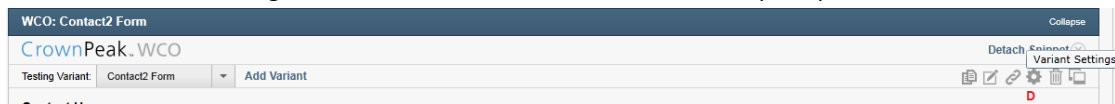
Click the **Add Testing Variant** button from the input control and enter variant name.



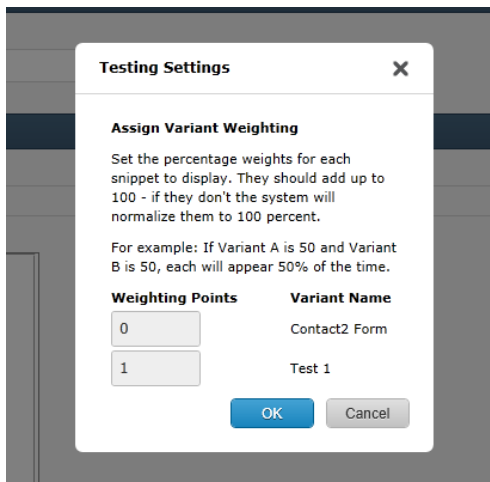
Add Testing Variant

Modifying Testing Variant Settings

Select the Variant Settings icon from the WCO toolbar and follow the prompt instructions.



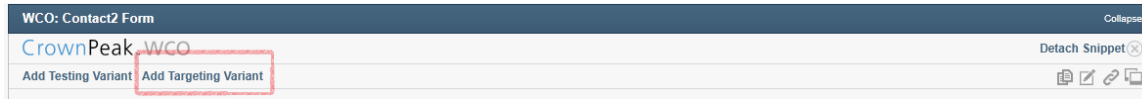
Variant Settings



Target Settings

Setting up a Targeting Variant

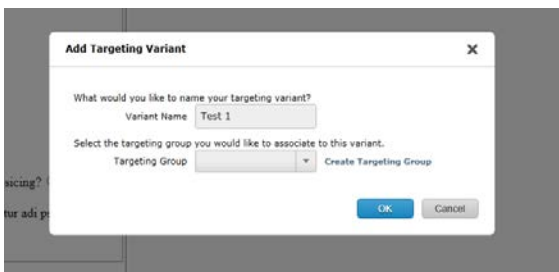
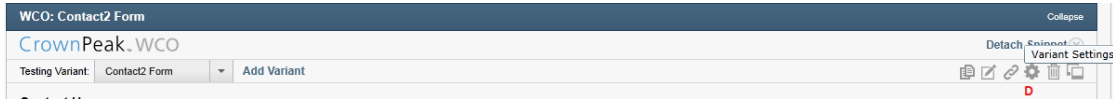
Click the **Add Targeting Variant** button from the input control and enter variant name.



Add Targeting Variant

Modifying Targeting Variant Settings

Select the Variant Settings icon from the WCO toolbar and follow the prompt instructions.

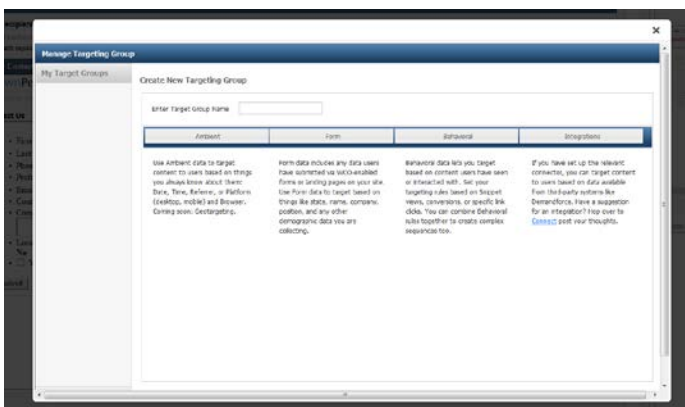


Add Targeting Variant

Assigning and Creating a New Targeting Group

Users can create targeting groups with targeting rules of the following:

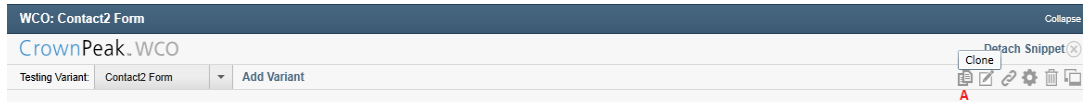
- Ambient
- Form
- Behavioral
- Integrations



Manage Targeting Group

Creating a Clone

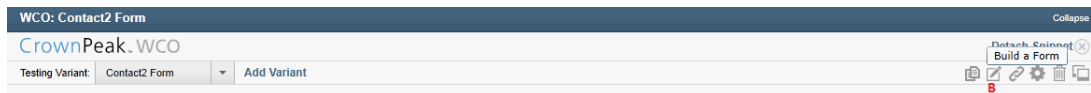
Select the clone icon from the WCO toolbar and follow the prompt instructions.



Creating a Clone

Setting up a Form

Select the form builder icon from the WCO toolbar and follow the form building wizard.



Build a Form

Adding a Conversion Link

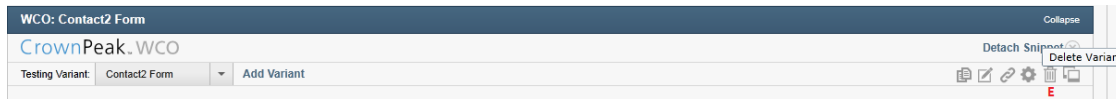
Select the conversion link icon from the WCO toolbar and follow the prompt instructions.



Insert a Conversion Link

Deleting an Existing Snippet

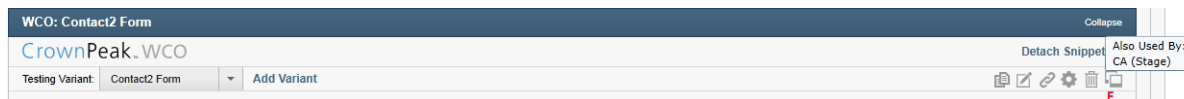
Select the delete icon from the WCO toolbar and follow the prompt instructions.



Deleting a Variant

Discovering Where a Snippet is Being Used

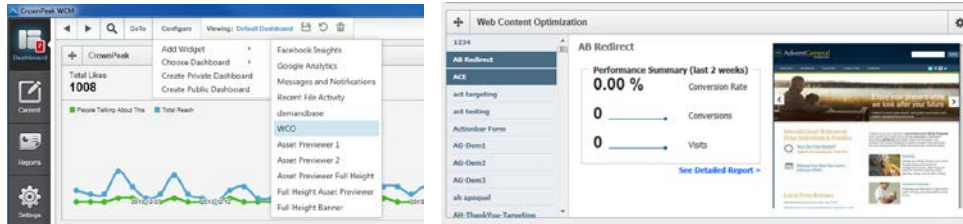
Hover over the Also Used By icon from the WCO toolbar and view the information listed.



Also Used By:

Adding snippet data to the dashboard

Add the WCO widget using the configure menu from the instance dashboard.



WCO Widget

Running Reports

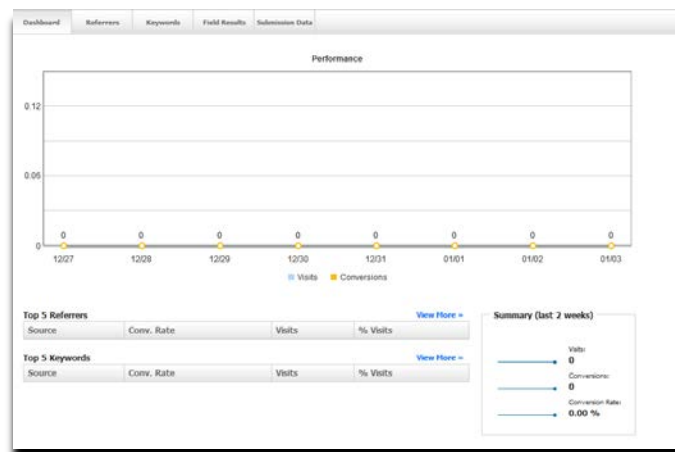
Reports can be viewed and generated by selecting the Apps icon in the UI and selecting WCO.



WCO Widget

Each snippet has the following available reports:

- Dashboard (Overview)
- Referrers
- Keywords
- Field Results
- Submission Data



Reports

Notes

More information can be found in:

- http://connect.crownpeak.com/pause_online/documents/products/webcontentoptimizerdocx
- <http://connect.crownpeak.com/documents/trainingportal/webinars/usingcrownpeakpersonalizationwco/crownpeakpersonalizationwebinarpdf>

Implementation Guidelines

In general, a WCO project takes about 20 hours to configure from a business process specification. Gathering the business requirements may take as much as 4 hours depending on documentation levels required. UAT and tuning the configuration may add 8 hours to an existing UAT.

PlayBook Notes

WCO Documentation

<https://wco.crownpeak.com/docs/>

WCO Introduction Video

<http://crownpeak.vzaar.me/967893>