SITECORE

WHITEPAPER

UX4CX

User Experience guidelines to design for
the Sitecore Customer Experience platform

Acknowledgements

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- Jill Grozalsky, *Director of Digital Strategy*, Brainjocks
- Simon Langevin, *Senior Product Manager*, Coveo
- Christopher Nash, *Director of Digital Experience Strategy*, Nodes

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Introduction

Why personalization should be at the center of your design

Customers are now expecting to see relevant information when they visit your website, and they reward you with increased conversions. Research shows that organizations that personalize achieve an average 19% conversion uplift. In fact, a recent report from Epsilon shows that high-value customer segments in fact want more, not less personalization, and they will reward you with increased conversions to your key goals.

Businesses around the world know this, and are excited about the potential that a truly connected customer experience across all channels can deliver. Executive sponsors at these businesses invest in a world-leading digital experience platform such Sitecore and engage teams to build their digital channels, spanning roles such as user experience designers, digital experience strategists, developers, content creators, solution architects, marketers and product owners.

However, design trends over the last decade have driven towards seamless or frictionless designs, and these can be at odds with modern digital marketing platforms that seek to optimize the customer experience. Put simply, for a platform such as Sitecore to work, it needs a little friction. Knowing when and how to create the touchpoints that will allow Sitecore to deliver a contextual, relevant customer experience is now a practice that UX designers must keep at the center of their mind when designing a site.

This whitepaper, UX4CX (User Experience for Customer Experience), hopes to address that by educating UX designers about the kind of digital touchpoints a platform such as Sitecore requires in order to deliver on the promise of optimization.

Who will find this eBook useful

The UX4CX whitepaper and education campaign seeks to help customers adopt Sitecore's optimization capabilities by educating them on how to design for personalization, whether they are building a new site or optimizing an existing site. By its nature, there are always improvements to be made in customer experience.

UX designers are a critical part of site build and development, creating the designs and interactions for the front end of the site. However, to date, they've been left out of the discussion about how experience management platforms work, and this is often one reason that marketers and site owners struggle to implement personalization and optimization tactics. This eBook is primarily addressed to them.

UX4CX also contains useful content for marketers, experience designers, product owners, content owners and developers at all stages of a Sitecore project. While it is particularly relevant for B2B customers who have a long research stage and need to personalize for subsequent visits to their site to nurture conversion to their highest value goal, it also contains useful information for B2C and Sitecore Commerce sites. Where applicable, we have included links to documentation around best practice for technical implementation of the interactions.

Why design for personalization

When you are selling a product or service in person – be it in a bricks-and-mortar shop, in an office or in a car yard – the process is a long conversation of verbal and non-verbal cues. Effectively, there's a series of questions and answers, as the customer moves along their path to purchase. Digital has changed this: one effect of the ever-increasing importance of digital channels in the research, consideration and selection phases of the purchase journey is the ability for customers to view your digital channels anonymously. Therefore, you need to build into your design the questions that Sitecore needs answered in order to identify and then personalize for your customer segments.

In the same way that a salesperson, retail worker or account manager is trained to assess the needs of the customer in front of them, your Sitecore site needs to be equipped through UX design, and then trained through configuration of the Marketing Control Panel, to assess the needs of the visitor.

First, you must create a design which has the digital touchpoints – that little bit of friction – necessary to identify the customer's interests, and the developers must build re-usable, editor-friendly, personalization-ready components for the pages. Then your digital team will implement an Engagement Value Scale, profiles for your content, set up campaign tags and other marketing definitions. Now you've got a site which is ready to deliver on the promise of optimization, first manually implementing and measuring optimization tactics, and then using the power of Cortex Machine Learning to scale and automate optimization.

How UX helps you identify segments in Sitecore® Experience Platform™

Personalization is a series of questions:

- Who are you personalizing for?
- Why are you personalizing for them?
- What are you going to personalize?
- Where will the personalization be?
- But importantly—how will you know it is them?

UX plays a vital role in answering each of these questions in the digital channel.

Why: In a digital universe, the Engagement Value Scale is the answer to the Why question; you are seeking to engage with them on your ranked goals, which feed up into your overall business strategy. Simply put, you are personalizing because it has an impact on your organization's goals.

Who: This is another important early question. Identifying the priority customer segments you want to offer a personalized experience for requires the ability to track them through digital touchpoints—and this segmentation requires interactions to provide the data for the platform to analyze.

Firstly, you must have the priority segments identified from your digital strategy or customer research. Then, work through a customer journey mapping exercise: how do they engage with you? Define the digital touchpoints in their journey so that you can track progress and engage with them to usher them further down the purchase journey, or re-engage those who start the journey but abandon or stall. These will form the interactions of your UX design.

What: The components of interaction and conversion that your UX design will create are not just a way to identify the segments; they are also the elements that will be personalized. Your calls to action, content sections, imagery and links can be varied to suit the journey of the visitor as they move through the site.

Where: This is partly answered by your content structure and your UX, and partly by the analytics you will see on the site once it is launched. To begin with, you'll personalize on high-impact, high-traffic pages such as the homepage, landing pages, category pages, conversion pages. But as you are able to identify and analyze the paths that your high-value segments take through your site, you will find other segments for optimization. You'll never discover those hidden gems if you can't identify the segments in the first place.

How: Which brings us to the how. The answer is with the world-leading Sitecore Experience Platform, a well-considered optimization plan, and great UX.

Remember: Personalization goes beyond products

We sometimes hear customers saying that personalization is not relevant for them, because they don't sell directly to their customers, or they're not in fact selling anything, such as in the case of a government department.

Personalization is not just about offering discounts or product recommendations. According to InMoment's 2017 Retail Trends Report, more than half of consumers value company interactions where the staff member demonstrates a strong knowledge of recent interactions. Yet, according to Epsilon's 2018 report The Power Of Me, only 20% of consumers report receiving personalized customer service.

Personalization should include your support and service offerings. Building your UX around personalization means you can capture information which can then be channeled to your customer service staff, so when they engage with a customer they are able to do so in a way that recognizes the customer's specific interests and requirements.

Every website should be personalized. There is always a better result to be achieved, for the organization and for the customers.

Plan for personalization first

Proper preparation prevents poor performance, and in the case of an experience management platform such as Sitecore, it is absolutely crucial to delivering the return on investment that your organization expects. Without it, we often see customers with existing sites facing painful roadblocks to optimization, sometimes requiring a lot of expensive remediation work. Unfortunately, this often means optimization is put in the too-hard basket. So please, plan early and plan often.

Benefits of the personalization planning process

We recommend you start planning for personalization early on in your Sitecore implementation project as the process will yield an enhanced user experience and downstream efficiencies for implementing personalization. Engage your partner and seek support from Sitecore Business Optimization Strategies in roadmapping your personalization, testing and marketing automation tactics.

Benefits of the Personalization Planning Process for UX and Tech

GOALS → SEGMENTS → SCENARIOS

UX

- Enhancement of user storyboards that accommodate various segmentation paths and scenarios
- New feature and component requirements identified for "micro-conversions"
- Expanded content requirements (copy and imagery) tailored for various personalization scenarios

Tech

- CMS architecture and design modifications that allow for personalized content needs
- Integration/data point requirements needed for segments to be identified in Siteore
- xDB and Analytics tracking requirements needed for triggering personalization and performance reporting

The roadmapping process, and implementation of the plans during the build, can also deliver the following additional benefits to your organization:

- Alignment between technical, marketing and business stakeholders about the agreed outcomes of the site. Other Sitecore customers have found this kind of planning has a great impact on team engagement in personalization, and it can often change stakeholders from reluctant to enthusiastic.
- The roadmapping process is often very useful at engaging non-technical stakeholders in thinking personalization first in their offline planning; you'll be much more able to gain assistance in using tactics such as campaign tagging, offline personalization, email segmentation and more if the people responsible for these areas are engaged in the planning process.

For more information on building an engagement value scale, download this whitepaper

How to plan for personalization

As a first step, you'll need to align your strategic and business objectives to your digital goals and Engagement Value Scale. According to eConsultancy's 2018 Optimization Report, this is a defining characteristic of businesses with high-performing optimization teams, enabling them to share their optimization roadmap and the results of their efforts across the organization, which then leads to continued investment in optimization.

Your roadmap should also include the following:

- Campaign tagging taxonomy
- Profile keys, profile cards and pattern cards for implicit profiling
- Priority customer segments for personalization
- Prioritized personalization tactics, and longer-term tactics
- A/B and MV testing subjects
- Marketing automation plans
- Organizational structure and necessary roles for ongoing personalization projects
- Technical readiness checklists to ensure you can put your plans into place

Together, these planned and implemented data points and tactics will deliver you a faster return on investment from your site's build and a provable business case to continue optimizing your site.

Although putting a personalization plan in place before beginning the build may give you a slightly longer project time and add a little cost, the quality of the site build, team engagement and faster return on investment are more than worth it.

Personalization best practice

Look at best practice – there are lots of case studies available which can give you inspiration. It's often the simplest tactics which perform the best. Keep these rules in mind:

- Make sure your segments have volume and the rules are simple to begin with.
- Don't start with multiple rules in place on a single page or component. Start with a few, on different pages. Test, learn, adjust, re-test. It's a continual cycle.
- You can only run one test at a time per page. All personalization should be put into a test at the beginning, to make sure it's working. Testing will split your customer segment into two, and show half the personalized content and half the default content. The results will tell you whether or not your assumptions are correct.
- As with anything, it's a balance – don't annoy your customers or make them feel watched. Do your personalization carefully. Make your personalization plans relevant—not personal.

For more help on your personalization planning, see Sitecore's many resources on the subject, or else contact your partner or the Sitecore Business Optimization Strategies (SBOS) team.

Achieving optimization on an existing site

If you have an existing Sitecore site, and you've determined it needs some UX revision to fully utilize the benefits of personalization, much of what we have recommended is still quite achievable. The steps to implementing a UX4CX program on your existing include:

- First, make a plan—the same as you would with a new site build. The plan may be smaller, focused around one product area, or a specific campaign, but it's still the same process.
- If you can, maybe start with some quick wins with your existing site to inform your remediation. Even if you don't have all the interactions you want, there are always options available for optimization. Consult a Sitecore expert, such as your implementation partner, or the Sitecore Business Optimization Strategies team, and you'll be able to find some segments that can be optimized for, as well as possible A/B testing tactics.
- If your templates haven't been built for personalization – that is, you cannot open a page in Experience Editor and change a datasource for another for personalization or a test, perhaps you can add a landing page for a campaign, or rebuild one template.

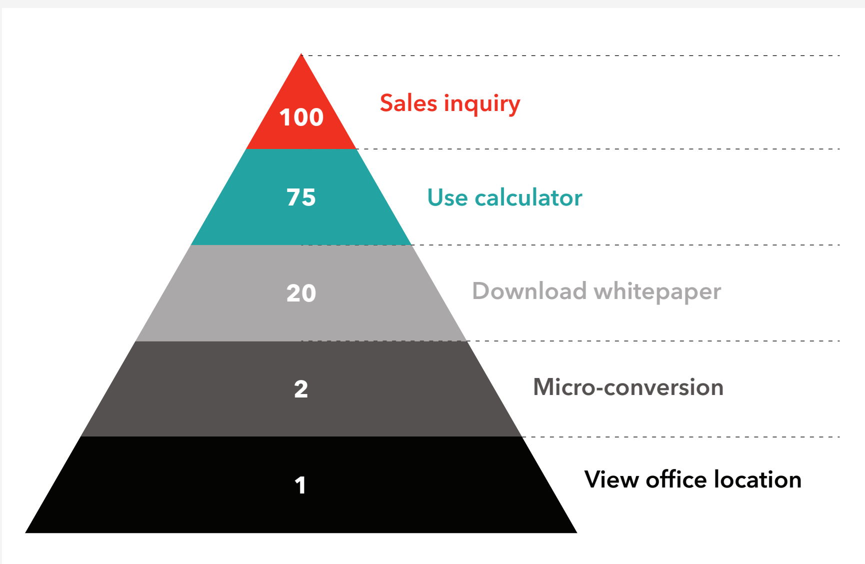
Once you've found some quick wins, you can go ahead and start planning any major development work you may need to do in order to get an optimization program in place.

Personalizing for the unknown visitor with micro-conversions

Micro-conversions are the actions that a visitor takes that lead up to a larger conversion, such as creating an account, buying a product, or making a sales inquiry.

Some well-known examples of micro-conversions include actions like signing up for a newsletter or downloading gated content. However, in the context of a thorough personalization strategy, these conversions can be relatively valuable goals, because they require enough trust from the visitor to provide their identifying information, such as an email address, which can turn an unknown visitor into a known contact. Additionally, in a mature optimization and marketing automation plan, this identifying information can be turned into a lead to be nurtured through the funnel to a higher conversion.

While registering these behaviors is crucial for your optimization efforts, there are often other micro-conversions which can be built into your site to reveal valuable information about your visitors. These are micro-conversions which do not ask for identifying information but will allow you to optimize all stages of the customer experience, before your visitors have become a known contact.



In your Engagement Value Scale, these will be very low, but accumulated over multiple sessions they'll show a visitor who is interested in your product or service; and more importantly, they'll allow you to craft a relevant experience which will move the visitor towards identifying themselves via a higher-value goal.

These micro-conversions can also help you identify which paths, channels or campaigns are providing interested visitors who are high up in your conversion funnel – the influencers who are doing the research. If your conversion to these goals is higher for one segment than another, then that may be a good segment to optimize. You can analyze why that segment isn't identifying themselves and put in place some strategies to boost their interaction with the micro-conversions, then optimize their journey towards your higher value goals.

Finally, non-identifying micro-conversions are great candidates for A/B testing. You can test if they make any difference to the higher value goals, or if they're essentially irrelevant to your customer journey.

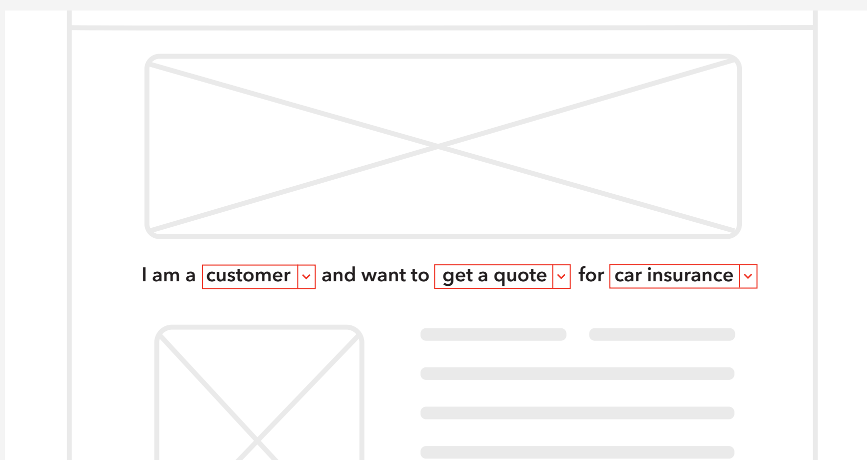
Examples of micro-conversions

There are many ways to ask a visitor for information about their interests without asking for identifying information. When designing non-identifying questions you can ask a visitor, consider this: If you were categorizing your customer's interests, what categories would you have? Here are just a few examples to consider.

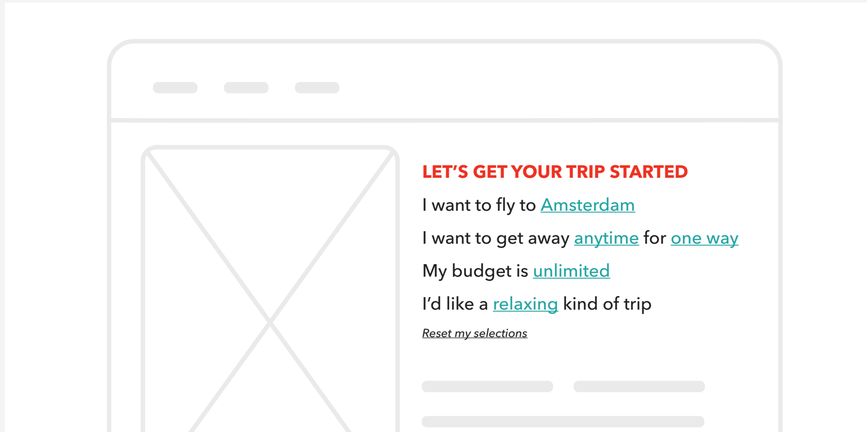
Ask what they're looking for

Use cases: Insurance, financial services, travel and professional services

These kinds of questions are perceived as extra navigation and get a high rate of interaction. Make sure you plan what will happen after the questions have been answered, as customers will expect a higher level of help than just a change of imagery or a related content. They're intending action, so help them find the right path.



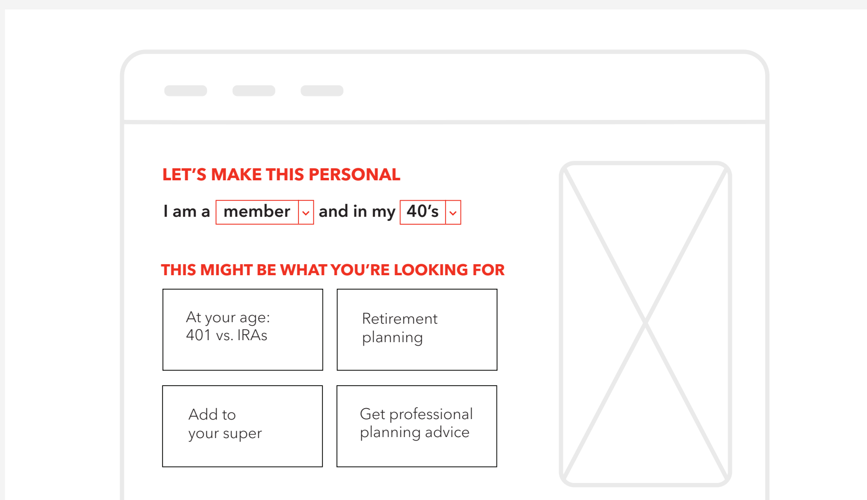
What is the purpose of your trip?



Are you a customer X/customer Y/customer Z?

Use cases: Education, manufacturing, financial services, healthcare

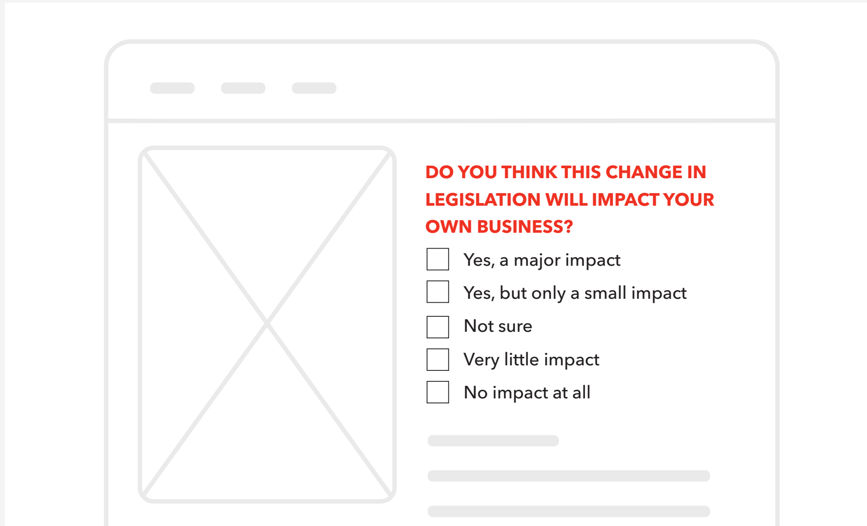
This is a great option for any kind of site that has clearly delineated high-level customer groups. It's particularly useful if you may have first-time visitors who have been signed up to your product offline (such as superannuation or insurance), or any scenario in which you don't know they're members/customers by a previous login.



What's most important to you (about our product/service/article topic)? What do you think about this?

Use cases: Content-heavy B2B sites aimed at professionals, such as legal, professional education, media, technology or healthcare.

Many businesses invest a lot of time and resources in creating long articles about changes in their industry, and then invest more in attracting visits from professionals in their industry who are their customers. Rather than having the visitor passively consume the content, consider how you can engage them in their opinion on the topic. Or, failing a specific question you can ask, a simple "was this article helpful" can allow you to profile their interests. This can then feed into personalization on their next visit.



Ask the next question after the first one has been answered

Once a micro-conversion or gatekeeping question has been asked, hide it and ask the next question or provide a relevant call to action. In the example above for the superannuation company, what do you want them to do after they've selected Retirement Planning? Perhaps you could offer them a gated planner download, or prompt them to book a callback. Or, in the legislative example, you could invite them to an event if they choose the "yes" answers.

Keep the flows short, but relevant. Unless you're offering a high level of personalization, such as the travel example above, one question at a time is a great way of building trust. Of course, you can always put this through a test – do your visitors respond better to a few questions at once, or a flow of questions through their journey?

Things to be careful of

Once you start designing these micro-conversions and building them into your optimization plan, it can be tempting to overuse them or over-promise on the results. Start small and build as you get results. And always test!

Don't be the gatekeeper

These examples show how seamlessly micro-conversions can be integrated into your site, so they are perceived as a useful feature rather than annoyance. However, when you take micro-conversions and make them an overlay, which a visitor must answer before accessing the site, these are gatekeeping questions and they can turn from a natural part of the journey into an annoyance, leading to high bounce rates.

Think of the difference between being asked what you are looking for as soon as you walk into a shop, versus after you've been browsing for a while. The former feels like you're unwelcome if you just want to look around, and the latter feels like they're interested in helping.

Don't set expectations you can't meet

Market leaders such as Netflix and Amazon have promised a high level of personalization, and they meet that expectation, more or less. Be wary of setting yourself up for failure in the customer's eyes by offering the same level of customization, for example by explicitly offering to personalize your site for them. There are often roadblocks in delivering this; for example, without turning them into a known user, it can be very difficult to personalize across devices. The visitor doesn't know this and becomes annoyed that the promised level of personalization is not occurring on their mobile as it was on their laptop. Be careful what you promise.

Don't ask without offering something helpful

Plan out what happens when they answer a question. Are you offering them helpful links, or simply tailored content? The more questions you ask, the higher the level of expectation set.

If you ask them a series of five questions, they'll expect a very relevant experience, otherwise they're going to get suspicious you're just gathering data without any benefit to them, and you'll lose their trust. Whenever you ask for information, there must be value for the visitor.

Don't lock them into one answer

If the micro-conversion is particularly detailed (such as the travel example), make sure you offer an ability to reset, change it or perhaps show the original question again on the next visit, depending on the use case.

Technical guidance

- Wherever possible, use Sitecore's out of the box functionality to create these micro-conversions. Tools such as Sitecore Forms and Marketing Automation can be very useful here. For example, you can use a Sitecore form to create the conversion, then Marketing Automation to change the profile key for the visitor based upon the answer, ensuring you can personalize for them on the next session, even if they're still unknown.
- With a little additional work, you can create a custom interaction facet and personalization rule, so the data entered is visible in Experience Analytics and can be used for real-time personalization upon save. Sitecore's open source HabitatHome demo site has an example of how to store profile data via form data. Remember, Habitat is a demo site not a starter kit. Use Helix principles in building your site. You can also visit the Sitecore documentation site to see an example of how to create a custom save action.
- Security and trust go hand in hand – if the user doesn't push the submit button, you cannot and should not store the data against the profile.

Micro-interactions

Presenting all the information about your product or service on a long page has become popular with the impact of mobile usage and the change to visitors' browsing behavior brought about by infinite scrolling in social media networks. Nonetheless there are good reasons to not make it quite so low-touch for the customer when designing for an experience management platform such as Sitecore.

Requiring an interaction from your visitor allows you to track their behavior. Whether it's a click to learn to more, expanding an accordion, moving between horizontal or vertical tabs, or scrolling through an image gallery, each interaction gives you another datapoint about their interests. Accumulating these data points and matching them to your customer segments allows you to personalize your site to show them what's most relevant to them, or to encourage them to engage with you further.

Additionally, as with the micro-conversions above, these micro-interactions are components that can be shown or hidden based on personalization rules; for example, you may want to show or hide a particular component based on desktop or mobile, or where a visitor is in their customer journey.

Don't think of this as an additional burden on the customer, simply a different way to present the information, and one which enables you to offer them the relevant experience that they want.

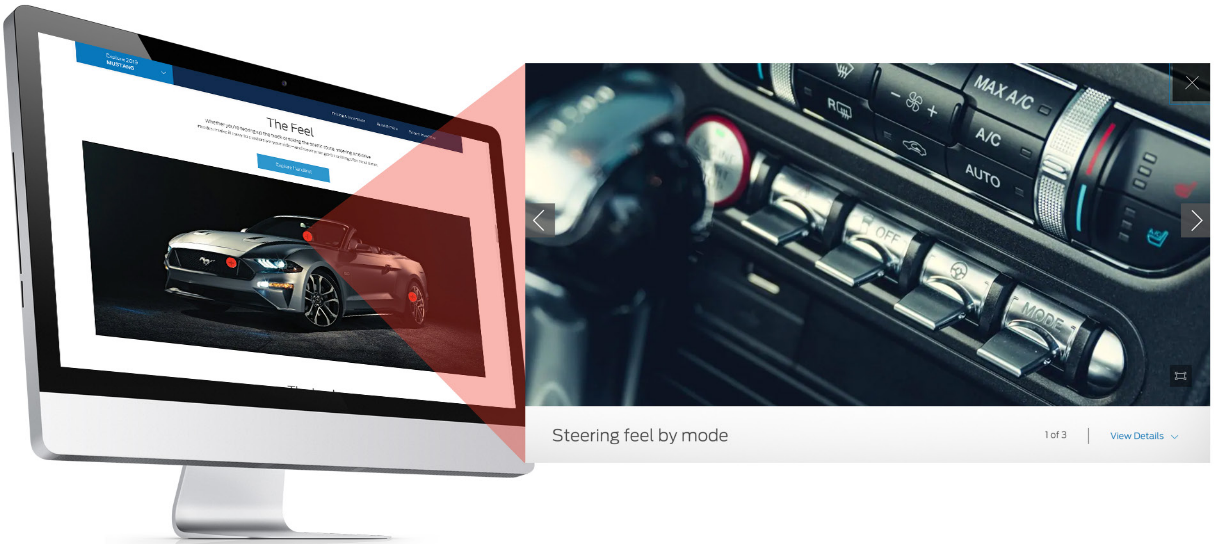
Here are some possible micro-interactions to consider in your site's UX.

Click to...

The classic "Click to learn more" if executed elegantly can be very effective. Consider designing inviting touchpoints that your visitor will want to interact with.

One possible option could include a product image with touchpoints that open an overlay which presents more information about that aspect of your product, an image gallery, assets to be downloaded and even calls to action such as social sharing – all excellent micro-interactions in themselves. A visitor who opens the overlay, scrolls through the images and downloads a brochure is visitor who is very interested in that product, or in that aspect of your product. This is valuable information for you.

Figure 1: Click to learn more example–from Ford Mustang. Excellent example that includes click areas, overlays, accordion and CTAs!

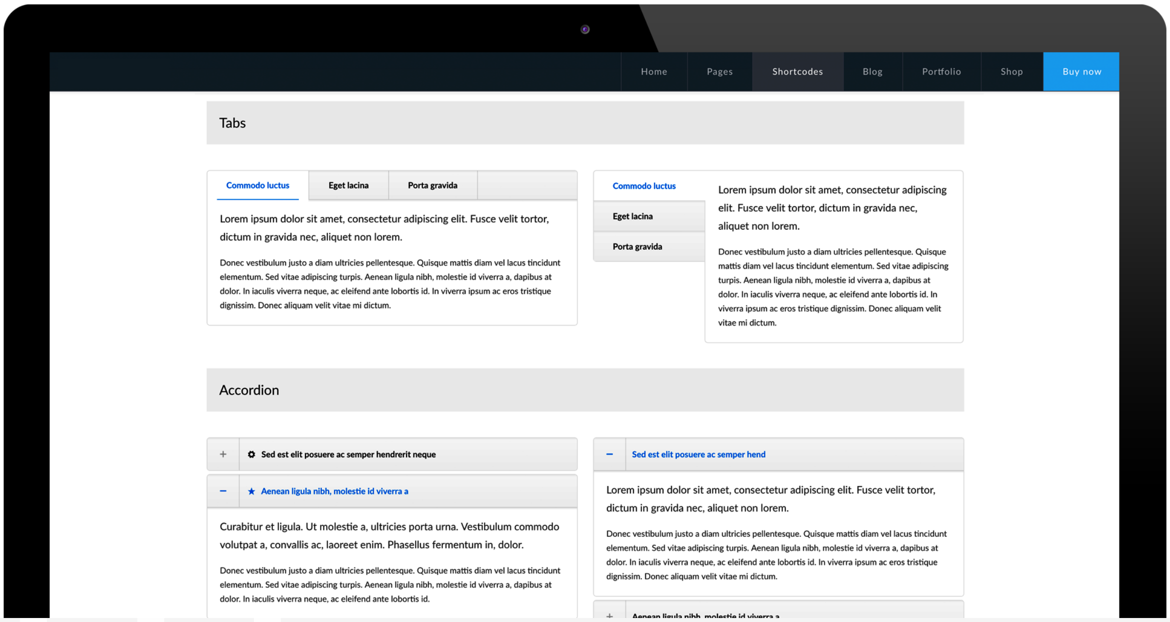


Accordions and tabs

Accordions are a page element that has stood the test of time, and if done well, can be both inviting and usable. They can be particularly useful on pages showing additional information about your product or service, allowing users to expand the features most relevant to them.

- Consider including a CTA or further interaction within accordion tabs. Accordions are preferable over tabs for longer headings or if you want a preview of the content to be shown.
- Accordions are also ideal where page real estate would be wasted by necessary but non-critical text content, such as technical specifications, or installation instructions etc. Knowing that your visitor was interested in deeper information on your product or service tells you where they are in their journey.
- However, tabs can offer other benefits, such as not requiring your visitor to go back to the top and choose the next accordion. Tabs can also stay in place after being chosen (and be open on that tab on the next visit) and you can use swiping to go between tabs on the mobile experience. Take your inspiration from fast-moving consumer goods or other eCommerce sites, even if you're designing a B2B site or one which is about a service or technology which isn't in the same space.
- Tabs can also be vertical of course – a great option if you have too many to fit across the desktop layout, or when the titles are too long for a horizontal layout.

Figure 2: Examples of common tab and accordian configurations



Search

Internal search is probably the oldest used digital micro-interaction, and one of the most important. If search is left off your site, you're losing some key customers. Visitors who use search are more likely to return to your site to purchase, and twice as likely to convert to a sale according to eConsultancy.

In a personalization strategy, internal search has a number of important functions, the weight of which will vary depending upon your customer journeys and industry:

- As a micro-interaction, internal search can surface important information about what your customers want. If you build your Sitecore implementation so that internal search is appearing in the Keywords property in Experience Analytics, you can first analyze the value of visitors using top keywords, and then use personalization rules to deliver content to visitors to people using specific terms or words.
- A search component is also a really useful piece of content to have available based on a personalization rule. Time on site and bounce rates are often used as success criteria, but a visitor spending a lot of time on site might simply be lost, and without offering any form of search, and properly tracking that search and the resulting click, it may be impossible to know. Test an internal search component that shows if a visitor has been looking at a lot of pages without interacting, as this could be because they can't find what they're looking for. The results of the test will tell you whether that segment is frustrated or happily consuming your content.
- Consider modifying the rendering of your search component on different pages or based on different rules – elements such as labels, introductory text, color, width of the search box and more can all be changed according to

personalization rules.

- A search component is also a great candidate for A/B testing. Getting a great search requires testing, so use Sitecore's testing functionality to make sure your search is as good as it can be.

Using Search to optimize your overall marketing activities

Last but not least, internal search can be used to improve your inbound and outbound marketing. For example, if you've enabled internal search to be recorded in Sitecore® Experience Database™ (xDB), you can analyze which keywords are providing the most value per visit vs the most visits – do you need to provide more content to bridge a mismatch when a particular keyword is being entered often, but isn't providing a good value per visit? Or if that keyword is generating great value, but isn't getting entered often, does this indicate visitors are finding that content through navigation or external search?

Carousels, galleries & image grids

Images on your site are very useful for personalization, and including different kinds of image components can allow you to track the visitor's interest in one image or another.

Historically, carousels have been used to present a range of messages for different customer groups. A well thought out personalization plan should actually remove most if not any need for this; why have a carousel which automatically rotates to the next image, when you can present a hero which gives your visitor the information they want and not the next slide which is for another customer segment?

If you do need to have multiple images in one place on your site, a better choice is to have a gallery or an image grid which triggers a lightbox. Using these kinds of images means you can track the interaction with these components, then personalize based upon that. Consider placing them in the content, not just at the top of the page – or do a page level test to see where the images get the most interaction.

If your image has a link or call-to-action on it, there are many easy to implement options for tracking this interaction. And of course, the image components themselves can be personalized and tested to find out which imagery works best for each segment.

Calls to action

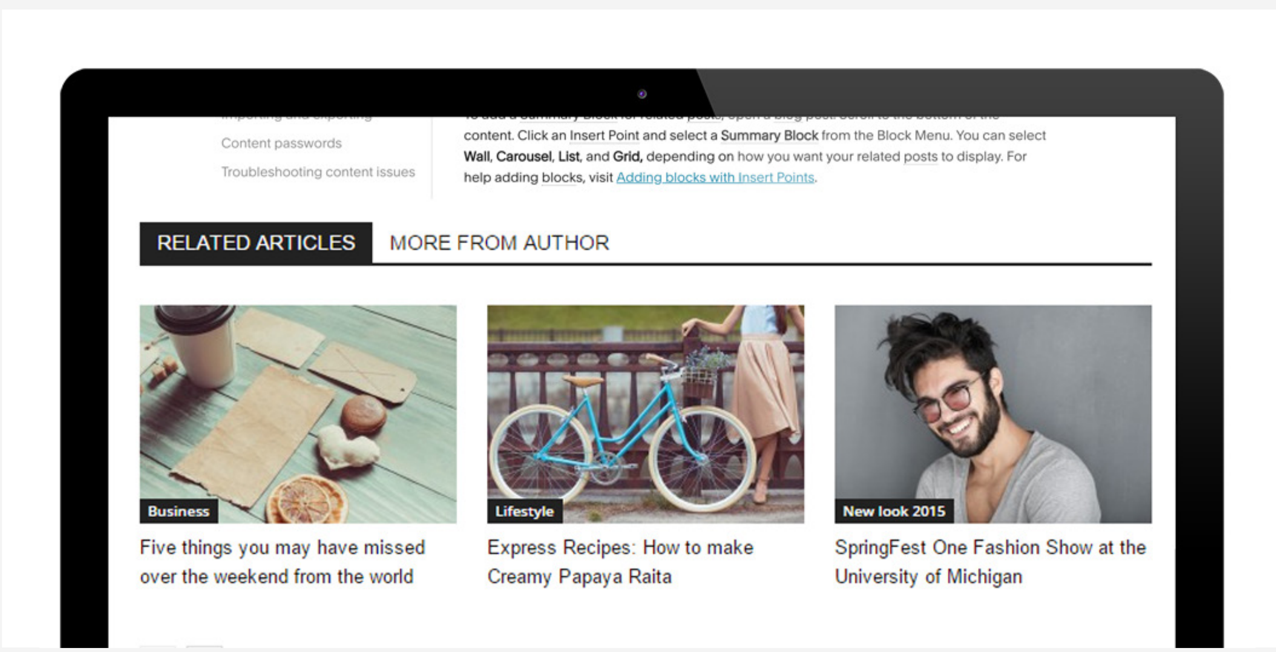
Whether your call to action is adding a product to a cart, making an inquiry, looking up a location, downloading an asset or creating an account, being an actual interaction with engagement value makes it a top candidate for personalization and testing.

When designing the site and the CTAs, consider how you may need different CTAs to appear for your visitors. Think about variations of language and design that can be tested or personalized for different customer segments, then put them into a testing program to make sure you're getting the best results possible. Easy optimization options for CTAs include:

- Showing the relevant app store for the device in use
- Showing the next goal in the customer journey once a lower-value goal has been completed
- Changing "contact us" to "study with us" for an education site, or "invest with us" for an investment fund, or "stay with us" for a hotel
- Test whether gated or non-gated downloads works best for your engagement metrics, and how much information people are willing to provide to access the content

Related articles

Related articles have been a web staple for years and are still a great way to encourage interactions. Consider having different versions of these for your various segments, and testing the language on them to optimize their relevancy to these segments.



Technical guidance

- Always try to use as much Sitecore out-of-the-box capability as possible. SxA has components for accordions and tabs, and using these will make it easier for your content editors and a smoother path to upgrade later. However, to tag a goal or event against an accordion or tab, you'll need to do a little development work to call xConnect. Information is available on the Sitecore documentation site.

- If you do build custom components, ensure they are Experience Editor compatible. Can you place one on a page and put in a personalization rule, then put it through a test? Include testing any components by your content editors as part of your build, including tagging the components with goals, events and/or profiles if that's what your personalization strategy calls for.

- One option for tabs is to have them load a separate page. The advantage is that you can easily assign an event or profile card to the page, and you can personalize the tab content. It also makes sharing that specific content very simple as it will have its own path in the URL. The downside is the page reload, but if you are building your site with an eye on page load times, this is a trade-off worth considering.

Forms & thank you pages

Sitecore Forms make creating and tagging a form straightforward. Included in Sitecore 9+, Forms makes it easy for content editors and marketers to create, re-use and test forms. The drag-and-drop interface, easy styling, validation, testing and reporting makes form use a simple task.

The submit actions include displaying a thank you message, triggering a goal campaign or outcome, sending an email, saving the data, and redirecting to a page. Be careful with your ordering of the submit actions; redirecting to a page cancels all actions after that, so make sure you save the data first. If you are redirecting to a thank-you page, you can assign the goal to that page as long as it's unique to that form; otherwise, assign it to the submit action above the redirect.

Thank you pages–when you should have them & how to use them

As designers have looked increasingly to frictionless design, thank you pages for forms have become rare, often because it is thought that they take the customer out of their journey. However, when designing for personalization, there are many benefits to having a dedicated thank you page for your forms and valuable interactions, and a personalized thank-you page can in fact make it easier for the customer to continue their journey.

In fact, as best practice for Sitecore, there are more reasons to have a thank you page than there are reasons not to.

When to have a thank you page for a form

- If you want to include recommendations for next steps/related information/ related products
- If you are offering the user a reward for completing the form (a download, access to special content, a coupon code etc)
- If it's a subscription form, it's ideal to have a thank you page so they can see any security information, such as checking their inbox for a confirmation email
- If you want to keep the fields on your form to only those absolutely necessary, you can use a thank you page to host a secondary form, such as to ask more questions after a simple subscription form, e.g. what are you interested in, demographics; or after an enquiry form, a subscription opt-in or additional questions to help you personalize your response

RAC WA used their thank you pages for a machine learning trial offering related products in an effort to cross-sell to their customers.

The result was an increase in retention rates from the thank you page and 62% increase in motor insurance quote requests for the segment.

Click here to read full case study.

- If you want to use Machine Learning to suggest related products after they've completed a transaction such as bill payment, renewal etc.
- If you want to try A/B testing a related offer or secondary form
- If you want to use Path Analyzer to examine the path after submission and to optimize for visitors who have converted
- If you want to do optimization or retargeting in your acquisition campaigns based upon users who reached the thank you page
- If you are using external forms to capture data, either hard-coded into your site for technical reasons, or on a third-party site which allows you to specify a success page, having a thank-you page on Sitecore still allows you to capture the conversion and build a customer journey from it

When you don't need a thank you page for a form

- If you're doing a micro-conversion such as those discussed above. It's better in this case to have the page they're on offer relevant content or use the micro-conversion to personalize the remainder of their journey
- Any other kind of gatekeeping question or information gathering used to personalize the experience

Best practice for thank you pages

- If you're not going to have a thank you page, assign the goal to the submit action in Forms. You may still redirect to a page on submit, depending on your user flow and the use of the form.
- Make sure the page is hidden from search or indexing both internal and external and isn't available on your sitemap. It's weird for a visitor to happen on a thank you page when they haven't filled out the form, and you don't want any goals or content available on that page to be triggered by a visitor who hasn't given you the information required.
- Make the page lightweight so it doesn't take long to load; waiting for a thank you page can undermine trust that the form has properly submitted.
- Personalize the page – your visitor has just given you valuable information, and possibly even their money. When you're thanking them, making it personal will assure them that you value their trust, and that the interaction has been completed successfully.
- If the form was offering gated content, make sure it's accessible from the thank you page as well as being emailed to them (unless you have legal reasons for needing to do one or the other)
- Make sure the page doesn't offer the same conversion again - if they've already subscribed, they shouldn't see a prompt to subscribe. Offer a different CTA, such as a related event, download or offer.

- Consider adding social share buttons if they've transacted in some way—whether it's an actual purchase, an event registration, an offer or an asset download. Make sure the social share doesn't share the thank you page however, but rather the CTA page. Make the CTA relevant to the action they've just taken: "Look what I bought", "Invite a friend" "share this offer with your friends" or "Tell a friend".
- Social follow buttons are also a great option for a thank you page. If the customer trusts you enough to have interacted with you, ask them to follow you on your organization's social networks. Tell them why they should follow you—what can they expect to get from following your page?

Information architecture & profiling content

Information architecture refers to the structure of your site's content and how it is presented to your visitors. While there are many considerations to take into account when doing this, it's also worth thinking about the content profiling you'll want to use to identify your customer segments.

Content profiling is the process of defining and applying profile cards to your content. This then allows Sitecore to match your visitors into a Pattern based on the content they view. When you have visitors matching into Patterns, you can use this information for personalization, marketing automation and analyzing their behavior. Sometimes called behavior profiling or implicit profiling, it's an important part of your personalization strategy.

The profiled content can be mapped to many different customer segments, such as product, service or industry interest, implicit user type, decision criteria and user journey. Any single Sitecore site can have multiple groups of Profile Keys, Profile Cards and Pattern Cards, so it's not a case of having to fit everything into a single profile group.

Planning your content profiling requirements ahead of the build has a number of advantages, including:

- Identifying any content gaps that are needed to build out the profiles. Typically, a visitor needs to visit three or more pieces of profiled content to fit into a pattern match, and this pattern match is dynamic as they then go on to visit other profiled pages. So, having enough content to enable you to build pattern matches for high-profile segments is a key part of a successful implicit profiling strategy.
- Where possible, align your information architecture with at least one set of profiles. For example, if your information architecture is split by your customer segments (for example, residential, business, tradesperson for a utility company), or by your product groupings, then having a set of profiles which follows that is often the first step in profiling.
- Having your profiling strategy mapped out and implemented before you start uploading the content to the site is a great time-saver. The creation and mapping of content during the build can include the relevant profile cards, and then it's just a few extra clicks in the uploading process. This is much less painful than later going back through your entire site and applying profile cards.

Wireframing & page layouts

When it's time to create wireframes for a Sitecore site, the UX designer should work with a certified Sitecore developer on the designs. You'll need to collaborate closely to ensure your templates have the flexibility required to deliver the personalized content necessary for optimization.

By the time you're creating your wireframes, you should already have a plan in place for optimization of the site at go-live, including your digital touchpoints such as goals, micro-conversions and micro-interactions, and prioritized segments, as well as personalization and marketing automation tactics. Having this plan in place will guide you and the Sitecore developers in building the templates and other development priorities, and will ensure personalization doesn't slip off project scope.

Wireframing an optimizable page

A wireframe for a particular page type may allow specific content blocks as a default, but think about how you may want to change that page based on certain conditions. Additional placeholders to allow components to be shown or hidden for specific segments of visitors can be really useful, and it's much easier to build them at the beginning than go back and rebuild a layout.

Key points to consider:

- Look at your main content area. Think about how you may want to add additional content above, below or even in the body of this area based on the visitor's segment. For example, if you want to include a micro-conversion mid-article based on the user's previous behavior, are you going to be able to do that? Or above or below? Make sure you discuss this with your front-end developer so they know what you want to achieve.
- If your site has a sidebar, or an extra footer, be sure this can be personalized at the level you want. Swapping out the whole area for another can be quite painful, but so is personalizing an area which is too granular in its build. Will you want to change the entire area, or only one CTA?
- Pay particular attention to your homepage. For example, if you have a hero banner followed by a grid of three x two components, will you need to optimize the entire grid, or a row, or a single component?

- Consider adding a placeholder above or below the header which can be shown or personalized based upon rules. Possible content could include:
  - Product launch of interest
  - New article of interest
  - Recent case study or award
  - Promote an upcoming event
  - Promoting newsletter registration

Headers and footers

Sitewide components such as the header and footer, and the elements they include such as menus and calls to action, are great options for optimization if done carefully.

- If you have a megamenu which includes content call outs (such as latest article), if you can personalize this based on the visitor's segment, it can be very effective.
- The ability to personalize a header, footer or navigation component based upon a previous visit can provide some great results for people who are coming back for a second or third look at your offering. You could highlight content which is relevant to their stage in the journey, for example, moving from research to consideration.
- Also, testing is a great option for your header and footer. For example, put a test in place around your key CTA in your header and footer. Consider looking at the language, color, or size of your CTA.

Remember, you can't test sitewide out of the box; you need to implement the test per page. So use your homepage, a landing page or other high-impact page where you're looking to make a real impact, and test your components in the header or footer there. What you'll learn from that test will allow you to decide whether or not it should be personalized sitewide.

Technical guidance

- As noted above, the UX designer and development team should work closely together to ensure the desired layouts and components are as flexible as required while maintaining usability for content editors. Sitecore® Experience Accelerator™ (SxA) includes Bootstrap 3, Foundation and Grid 960 grid systems by default, and others can be added. Use Helix principles and SxA to future-proof the site's build and increase speed to market.
- To personalize a component sitewide, you need an SxA component. After you create the global shared component, you can apply the personalization rule to the component, then reference that component on any page sitewide. This will mean the personalization rule is applied on all pages. It won't be in a test, so you should always test it first on a high-impact page as per above.

A few other things to think about to get the best site you can

Component usability & re-usability

As stated above, the UX designer and developers should work closely together to define the components for the site. Some key points to think about:

- How will the component be used for personalization? Is the personalization planned going to involve swapping one component for another, or simply changing the look of the component? Plan for the future and provide lots of user-friendly options.
- How usable is the component for content editors and marketers? Often, these crucial roles are not brought into the process until the development is nearing completion and it's time to start uploading the content or during UAT. Including your content editors in the early testing can identify any issues while there's still time to address them. Have your end users test out your development by asking them to create a page, open it in Sitecore® Experience Editor™, add components, personalize them and put it into a test, at suitable stages of the development. A minimum viable product site at go-live shouldn't be uneditable by the marketing team, and their early exposure to this will help them when they start to control the site.
- Think through the naming of your components. It's more painful to implement personalization and to read test results if all of your editable components are called "ContentBox."

Exploit Sitecore's OOTB capability to build your CX journey

Sitecore is an extremely powerful experience platform, and has more tools available to you than you're probably aware of. There are many resources available from Sitecore to help you make sure you're doing as much as possible with the out-of-the-box tools in the platform; using these will make the build faster and more efficient, and will make it easier to upgrade in the future. Here are some to remember:

- Sitecore's Marketing Automation tools are a great way to engage in conversations with your audience, personalizing on page after page and channel after channel to show subsequent questions or personalizations. Marketing Automation can also be used to adjust the visitor's pattern match if they select a specific answer or trigger a goal.

- Sitecore 9 Forms are easy to use, highly extensible forms which will allow you to do a lot of what you need in your interactions. Supported by Sitecore and easy for content editors and marketers to use, we strongly recommend looking at Forms before hard-coding or using a third-party platform.

- Wherever possible, use Sitecore Experience Accelerator (SxA) to build your pages. Following best practice by default, your content editors will benefit from the drag-and-drop page assembly and the separation of design from content.

Sweat the "small stuff"

There are a few key elements to ask the developers to be included in your content templates. In order to get the best possible results from the channels that will be sending traffic to your site, remember to specify that the editors be able to upload both search and social metadata. This is a bit of a tedious task compared to the exciting work of achieving great wins with customer experience, but it's a very important element of search engine optimization, which is crucial for your organic search and organic social traffic.

Search engines have different limits on page metadata to social channels, which follow Facebook's OpenGraph protocol. Make sure your editors are able to separately specify OpenGraph title, description and images for each page to ensure any social shares are as high-quality as possible. Additionally, the metadata of the page should dynamically include OpenGraph URL and type metadata.

OpenGraph and search metadata are included in the Helix guidelines and SxA, but if you don't have those available, we strongly recommend you ensure they're built into the site or your existing templates are edited to include them.

Security

Consumers are becoming more and more concerned about the data that companies possess about them. Create trust with the consumer by making sure you are very clear about how you will use and protect any data you ask for, including non-identifying information. Particularly if you are asking for identifying information, include a short, clear explanation as to how you'll use the information you're asking for.

At Sitecore, we understand the value of data and the importance of protecting it. For information on GDPR and our privacy features, we offer the following resources:

- https://www.sitecore.com/gdpr

- https://doc.sitecore.com/developers/91/platform-administration-and-architecture/en/privacy-guide-281893.html

General technical guidelines and best practice

There is a lot of great documentation available from both Sitecore and the Sitecore community. Here a few useful tips:

- Please use the Helix principles and guidelines. They're there to help you
  - https://helix.sitecore.net/introduction/what-is-helix.html
  - But remember: the Sitecore demo site Habitat is not a starter kit! It's inspiration and best practice, not a set of templates you can modify to build another site.
- If your existing site doesn't have SxA in place and you want to use it, you'll need to install SxA and then create a new site in your Sitecore instance with SxA. Always test on a non-production server to ensure that nothing breaks on the existing site. Check what version of SxA is supported on your Sitecore version. We recommend you use the latest version of SxA if you can, as we are continuously adding new features. Having this available will give you an easy way to build your new pages, and a good test of why your eventual rebuild should be implemented using SxA.
- SxA has a lot of great documentation from both Sitecore and the community. Start with:
  - https://doc.sitecore.com/developers/sxa/17/sitecore-experience-accelerator
- The Sitecore community of developers and strategists are very active on the following sites. These are great places to ask questions and find information:
  - https://sitecore.stackexchange.com/
  - https://community.sitecore.net/
  - https://sitecore-community.github.io/docs/
- Contact Sitecore Business Optimization Strategies (SBOS) and/or Sitecore Technical Services to provide guidance

The team that works together wins together

The best results will always come from a team that is working closely together to deliver on the potential of a tool like Sitecore® Experience Platform™. It's vital that UX designers work closely with the front and back end developers of your Sitecore site, along with other team members such as analysts, marketing technologists, content creators; as well as marketing and business owners.

UX4CX design is a never-ending journey

Finally, like optimization, UX design for Customer Experience is an ongoing process. As the site yields testing results, the likelihood is you'll learn that some elements work better than others. The good news is that you'll be making decisions with a data-driven marketing approach, rather than based on assumptions which have never been tested. It's an exciting time to be a UX designer, and we hope you've found this whitepaper useful in designing for an experience management platform.

If you need more help, please reach out to your Sitecore account manager, the contributors to this eBook or the Sitecore Business Optimization Strategies (SBOS) team.