

Percussion CM System

Web Content Management With A Focus On Results

Percussion Personalization Solution

Deliver the Most Relevant Content to Your Site Visitors



Percussion Personalization Solution

Overview

Increasingly, the effectiveness of a business's Web presence is based on how interactive and targeted the experience is for site visitors. Marketing online has become a blend of traditional marketing methods such as campaigns and promotions, with newer "behavioral" approaches that let visitor interaction and participation shape a richer and more engaging experience. As a result, personalization – the dynamic presentation of site content based on visitor preferences and behavior – has long been a goal of businesses looking to improve their online customer experiences. However, because of an over dependency on site designers, Web developers, and other technology infrastructure, personalization has been beyond the reach of most marketing and business users. Only dedicated online businesses had the time, resources, and expertise to justify the investment.

Percussion's Personalization Solution puts the same capabilities employed by leading online marketers into an easy to deploy, pre-built package that makes personalization something any business can adopt. The Solution is designed to allow line of business users to directly control the dynamic, personalized elements of pages and sites through the same simple visual tools used for page creation and editing. Personalization requires no special delivery code or application, no formal template redesign, and no involvement from technical staff.

The Personalization Solution leverages Percussion's pioneering "Active Delivery" system to enable a completely decoupled yet dynamic Web architecture. This means Marketers use the native editing interfaces of Percussion's WCM platform, such as Active Assembly, to enter content and specify dynamic presentation rules and settings. The Active Delivery system then automatically processes that information, converts it and publishes it into a separate "decoupled" delivery tier without IT involvement or re-coding. As visitors interact with site pages, the pre-published personalized elements are dynamically selected or "matched" to the visitor who is viewing the page.

Solution Benefits

Percussion's Personalization Solution allows marketers to:

- Dynamically present the "best" content on a visitor-by-visitor basis, using either a promotion "push" or recommendation "behavioral" model.
- Promote or "push market" specific business content, such as new products, excess inventory, and monthly specials that are optimized for each visitor.
- Leverage visitor behavior to generate recommendations such as "top 10" or "also in your area" lists based on visitor profiles.
- Track visitor behavior and profile them through their use of the site as well as through login, Web forms and registration mechanisms.
- Segment visitors and content based on an unlimited, yet easily managed hierarchy. Any visitor or content element may be ranked or "weighted" as relevant in any number of different segment categories, such as interests, geographic regions, industry verticals, and demographics.
- Segments may be added, removed, and edited, even subdivided and re-combined without re-tagging content or visitor profiles.
- Experiment with personalized page elements without dependence on Web developers or designers.
- Preview how any dynamic page looks to different types of visitors.
- Preview how visitor behavior results in changing dynamic presentation.

Percussion's Personalization Solution: Key Features

Percussion's Personalization Solution enables business users familiar with the Percussion CMS Web Content Management platform to manage a variety of dynamic visitor-profile-driven content elements using existing Percussion CMS interfaces and methods. It includes the following key features:

Personalization Management

Marketers and other business users simply place “personalization items” – such as promotions and recommendations – into existing pages and templates to turn static pages into dynamic, visitor-specific pages. The user simply targets each personalization item to particular visitors by specifying the matching business rule, visitor segment and dynamic content that that will be presented on the site.

- **Promotions:** For promotions, business users explicitly select specific promotional content for given visitor segments and use personalization settings to select or match the “best” content element with the right visitor.
- **Recommendations:** For recommendations, the system uses business rules to select the most relevant content for visitors based on their profile. Content metadata such as date, content type, and even Web Analytics usage data can be used to control the resulting recommendation list. In addition, list elements can be sorted, filtered or specially “highlighted,” based on relevance to the specific visitor.

Dynamic Preview: Dynamic Preview enables business users to preview dynamic pages as they will be seen by specific visitors, or types of visitors. It features a “visitor profile” pane that allows the user to select visitor segments and other profile information and instantly see the effect on the resulting Web page.

Visitor Profiles: Visitor profiles can be created and saved, and standard types of visitor profiles can be maintained for future use, for example, a set of common “personas” that are used for site usability testing.

Visitor Profile Tracking: Dynamic preview also enables marketing and business users to interact with the site and view how that interaction is being tracked by the Visitor Behavior Tracking mechanism. This allows marketers to adjust page weights and rankings or to better predict what level of visitor interaction is needed before enough useful information is gathered to create an effective visitor profile.

Segmentation Management: This enables content authors and editors, and business intelligence specialists, to manage the various possible visitor categories, as well as group content into segments. Segmentation Management provides a fully hierarchical model with unlimited segment categories, as well as “weights” that can be applied to each.

Segmentation Tags: As authors and editors create and review content in Percussion CM System, a tagging mechanism allows them to simply check off all the relevant segments in a visual “tree” selection mechanism that is part of any Content Editor (also available from Active Assembly). Also, content may be automatically tagged as relevant to certain segments based on workflow, where on the site the content was placed, or other input validation rules.

Segmentation Folders: While tags allow incremental management of each piece of content, the Personalization Solution also provides a complete management interface for editors and business intelligence specialists, which shows the segmentation hierarchy as a set of expandable folders in the Content Explorer interface. This gives users a cumulative or “bulk” view of all content items in a given segment, and also allows easy addition, subdivision or combination of segments simply by re-arranging folders or by selecting and moving items in bulk from one segment to another. Any changes made from this view are reflected automatically in the “segment tags” for all affected items.

Visitor Behavior Tracking Service: This is an optional service, designed to be deployed and run in the Web site delivery tier. It detects visitors, matches them to their profile or creates one automatically. It then updates the profile with visitor segment information, based on how the visitor clicks through the site, or based on explicit methods such as login or Web form submissions. Existing visitor profiling systems, login and registration systems or tracking systems may be “swapped in” to replace this service.

Dynamic Content Matching Service: This optional service is also designed to be deployed and run in the Web site delivery tier. It uses information from each visitor's profile and combines it with business rule and presentation metadata to dynamically replace Personalization Items with the "best" content for each visitor viewing a page.

Personalization with Active Delivery: Decoupled AND Dynamic

The unique architecture of Percussion CM System's Active Delivery enables both the Visitor Behavior Tracking, and Dynamic Content Matching services, to run completely independently, or "decoupled" from the web content management system. When pages with Personalization Items are processed, Active Delivery assembles them into "partial pages" with special embedded markup and then publishes these into the decoupled delivery tier. The rule, segmentation, and dynamic presentation specifications made by marketers during content editing are embedded into this markup for decoupled processing by the delivery tier.

This special markup can be embedded in a variety of languages including DHTML, ASP, JSP or PHP. Even portal based delivery mechanisms can be used. Since both personalization services are invoked as asynchronous Web services, the delivery tier is entirely platform-neutral. Whenever these partial pages or page fragments are viewed by site visitors, the special markup is triggered. This invokes the Visitor Behavior Tracking to update visitor profile information, and/or the Dynamic Content Matching to produce the resulting dynamic effects specific to each visitor.

This dynamic presentation is entirely controlled by the Percussion CM System users, yet without any coupled interaction between the WCM and the Web delivery tier. This provides the key capability to allow marketers to control dynamic site behavior without constant dependence on Web developers.

Solution Components and Methodology

Percussion Personalization Solutions follow the standard Percussion CMS implementation methodology and are built on the core web content management platform. Personalization Solutions are delivered using the highly successful process methodology of Percussion's Professional Services Organization (PSO). Like any Percussion CM System implementation, Personalization Solutions are fully supported by Percussion technical support.

Personalization Professional Services

Percussion Professional Services will first provide a Discovery and Design session to identify the deployment scope of the key features of the solution (listed above) to an existing or new Percussion CMS implementation. Furthermore, services will provide for the installation and configuration of any added Components specific to this solution (see below). Finally, a configuration walkthrough of the Solution will be provided to the client development team as part of the knowledge transfer of the deployed solution. The customer may then optionally proceed with the implementation themselves or purchase further PSO services to perform further or custom implementation work.

Personalization Components

The Personalization Solution consists of the following technology components that will be added to the Percussion CMS implementation:

- **Visitor Behavior Tracking Service:** a Java Servlet deployable into the delivery tier. It is invoked through an SOA model by dynamic pages. (Optional)

- **Dynamic Content Matching Service:** a Java Servlet deployable into the delivery tier. It is invoked through an SOA model by dynamic pages. (Optional)
- **Segmentation System:** this enables the Segment hierarchy to be editable through a "tree control" as a field on any Content Editor, while the Segment hierarchy itself is defined as a set of Folders and Segment items in the Content Explorer.
- **Dynamic Preview:** A split pane UI similar to Active Assembly that shows visitor profile information on the left and the dynamic page preview on the right.
- **Personalization Implementation:** the content types, fields and their controls, and template markup that enable the creation of Personalization items such as Promotions and Recommendation Lists.
- **Rules:** allows developers to create new custom rules (Java) and add them into the Personalization Solution.
- **Visitor Tracking Tag Library:** enables site designers to plug into Web forms, login, or other visitor tracking mechanisms for use with Personalization Solution.

Solution Requirements

Percussion's Personalization Solution requires an implementation based on Percussion CMS 6.6.1 or above configured to use the new Assembly Services released in 6.6.1. New 6.6.1 implementations – all are covered automatically. Existing implementations originally built on 5.x or earlier – the system must first be upgraded to 6.6.1 and at least the Global Templates be converted to use the new 6.6.1 Assembly features and Velocity template language. Contact Percussion for more information on template conversion and implementation requirements.

Percussion empowers leading brands online.

Customers in a broad range of industries are using Percussion to create, maintain, and manage their online content and harness the power of community marketing, personalization, and analytics. We work with businesses in every vertical to help drive top-line results online.

The following is a selection of organizations that use Percussion's CM System, Solutions, and Services:



About Percussion Software

Percussion is the provider of The Percussion Approach, a combination of the Percussion CM System with solutions and services that have a singular focus: driving business results through multiple online channels including websites, intranets, blogs, and mobile devices. The Percussion Approach allows marketers and line-of-business owners to create, analyse, and change online content as they pursue the stuff that really matters – revenue, membership, or leads.

Percussion was named both KMWorld's "100 Companies that Matter in Knowledge Management" and EContent Magazine's "100 Companies Matter Most" in the digital content industry for five consecutive years and has received a number of other accolades including a Best of AIIM Award and a Codie Award for "Best Content Management Solution."

Percussion Software was founded in 1994 and has offices in Woburn, MA and London.

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