How to Get (Content) Rich Quick

Sitecore 7's search-based architecture helps marketers to deliver relevant, personalized customer experiences — easier than ever

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I. Introduction: Why Content Makes Marketers Rich

It's an understatement to say that today's customers are obsessed with information. Whether they are pondering a new beauty product or a change in financial providers, consumers and businesses increasingly consult multiple information sources including:

- The product or service provider

- User-generated content like reviews

- Social media, blogs and community sites

- Additional online sources, such as news media, professional associations, affinity sites and countless others, depending on the purchase being considered.

Search is the new browse

Statistics abound to support what marketers already intuitively know: today's customers search for, and aggregate, multiple types of content when making purchase decisions. In an information-saturated environment, casual browsing has given way to customers' more directed search for content that meets specific informational needs.

This shift — from browsing to searching — may be due to new user behaviors driven by the rising prevalence of mobile information consumption. For example, Comscore reports that 56 percent of mobile phone owners use their browser for search, making it the #1 activity on mobile browsers.[1] Across all channels, "core" search (on sites like Google and Yahoo!) decreased three percent in 2012, while the volume of "vertical" site-specific searches rose by eight percent.[2]

> Casual browsing has given way to more directed search behaviors, as customers seek content that meets specific informational needs.

In the marketplace, these trends can play out in astonishing ways. During the US 2012 holiday season, 58 percent of mobile phone owners used their devices to search for recommendations, reviews or price comparisons while inside a physical store. Furthermore, 28 percent of mobile phone owners used their phone to look up reviews of a product in–store, to help decide if they should purchase it or not , and 27 percent looked up a product price, to see if they could get a better price elsewhere.[3]

Customer reviews, in fact, can be a juggernaut in influencing purchase decisions; 61 percent of customers read online reviews before making a purchase decision,[4] and with good reason. Across the US, Canada and the UK, 72 percent of customers said that they trust online reviews as much as personal recommendations.[5]

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1. "Trends Shaping Local Search in 2013," presentation, Comscore, May 1, 2013.
2. "US Digital Future in Focus," Comscore, February 2013.
3. "In-store Mobile Commerce During the 2012 Holiday Shopping Season," Aaron Smith, Pew Research, January 31, 2013.
4. "Ecommerce reviews: Why you need them and how to use them," Graham Charlton, Econsultancy, March 20, 2012.
5. "Study: 72% of Consumers Trust Online Reviews As Much As Personal Recommendations," Myles Anderson, Search Engine Land, March 12, 2012.

Context is king

From a marketer's perspective, a customer's search query is an opportunity to present information that triggers a conversion and drives revenue. In that "moment of truth," the one in which the purchase decision is made and a lifetime customer relationship can be forged, relevancy rules.

In its advisory role in prescribing best practices, Forrester Research describes a digital marketing environment in which "context will be king in 2013 and beyond."[6] Here, Forrester predicts:

> **Digital experiences [will] become more contextual.** The customer experiences with the most impact meet customer needs, feel *personally relevant,* and deliver in the moment.... To succeed in today's digital environment, firms must deliver smarter, more customer-centric interactions that feel like they were tailored for each user and his or her specific set of circumstances. That's why firms need to evolve their thinking to focus on contextualization, which Forrester defines as: a tailored, adaptive, and sometimes predictive digital customer experience.[7]

Content is currency

Whether expressed or implied, then, effectively presenting all manner of content is an essential task of any marketer. It is the fiber of the contextual, curated digital experience customers are searching for, delivered through multiple communication devices and channels (desktop, mobile, tablet, email and more) in a single, cohesive conversation thread.

> Content — and the ability to put the right kind in front of the right person, at the right moment — becomes the currency that enriches the customer experience in innumerable ways.

The roadblock to effective context marketing

Many marketers have already embraced contextual content marketing ("context marketing") as a critical discipline. But content itself — specifically, the effective organization, presentation and management of large amounts of it — remains the #1 roadblock for content marketers, for two show-stopping reasons:

1. Most content management systems (CMS) use a highly structured "folders within folders" approach based on a traditional tree-and-branch file construct. Manual content filing and management is extremely labor-intensive. While this approach worked well in the past, it quickly becomes untenable for marketers with millions of content items at their disposal.

2. A traditional CMS also challenges marketers in optimizing the customer search experience. This problem is two-fold: First, serving the needs of individual customers, at scale, requires massive amounts of content, which is continuously generated by internal and external sources. As noted above, most traditional content management systems cannot handle content at scale.

    Additionally, in providing customers with the most relevant content in the fewest clicks or swipes, marketers exercise their prowess by promoting content and offers that align with an ever-changing business agenda. With no influence over the search function, marketers' ability to deliver content that fulfills business directives is severely handicapped.

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6. "Digital Customer Experience Trends To Watch, 2013, Ron Rogowski, Forrester Research, Inc., January 30, 2013. Emphasis added.

7. *Ibid*.

Clearly, before any ambitious context marketing strategies can be realized, it is imperative that digital marketers be able to handle much more content, and optimize the customer search experience, much better than they can today.

Sitecore 7 delivers massive content scalability and granular control

Sitecore has invested significantly to re-architect its unified software suite, offering the industry's first and only fully integrated search-based architecture. In doing so, Sitecore 7 empowers digital marketers with a new level of content scalability, control and searchability that:

- Lets them access and control tens of millions of pieces of content. This includes reviews, content and insights created by customers, and externally generated content, all of which can be housed in Sitecore.

- Enhances all aspects of customer- and marketer-driven search, affording marketers greater control, choice and customization.

> With Sitecore 7, marketers can shift their focus away from the tedium of content management to doing what they do best: using content to engage in personalized conversations that win customers for life.

- Imparts greater personalization powers, making it easy for marketers to deliver the individualized experiences that drive customer engagement and loyalty.

- Allows marketers to observe and learn from customer swipe-and-search behaviors, gaining valuable insights into customer preferences and patterns.

The Context Marketer's Lament

- Customers' attention span is only a few clicks or swipes in length. Only relevancy cuts through the noise.

- Presenting relevant content to the right person, at the right time, in the right place remains the "holy grail" of digital marketing — but for most marketers, is still out of reach.

- Marketers must be able to react quickly to poorly performing campaigns; most of these adjustments involve providing more relevant content.

- Large volumes of content make it difficult to be agile in presenting individualized offers and promotions.

- Customer conversations must be cohesive, weaving a personalized thread that tracks across multiple channels.

- Not all social content is relevant or helpful, so local storage, approval and filtering of this content is necessary.

Sitecore 7 addresses all of these challenges, and more.

II. Sitecore 7 Highlights: A Marketer's Overview

Designed for marketers, Sitecore 7 helps this audience to meet customer expectations for digital interactions that deliver a high degree of relevance and context. Sitecore 7 accomplishes two important goals, allowing marketers to:

1. *Store, manage and retrieve massive amounts of content:* Marketers can store and, just as importantly, easily manage massive volumes of content — up to tens of millions of items, and more.[8] With Sitecore re-architected to be search-based, content and websites no longer need to be designed with tree-and-branch structures. This frees visitors from adhering to a website's navigation to retrieve content; they can now assemble precisely the content they want using Sitecore's powerful, intuitive search capabilities.

2. *Provide world-class search and a personalized experience:* As detailed in the sections ahead, Sitecore offers native search management capabilities such as search facets, result boosting and search tagging, to give customers a relevant, immediate search experience. Once-static lists of content now can be dynamic and based on personalized queries, and easily defined by marketers.

> **Sitecore 7 empowers marketers to:**
>
> - Store, manage and retrieve massive amounts of content
> - Provide world-class search and a personalized experience

As a corollary to these accomplishments, Sitecore 7 gives developers better, easier ways to access content, described below in "The developer link."

Under the hood: Sitecore 7's search-based architecture

Sitecore 7 incorporates technology from Apache Lucene.net, a leading search engine optimized for applications built on the Microsoft .NET Framework.[9] Lucene.net provides high-performance search capabilities including:

- Ranked searching — best results returned first
- Many powerful query types: phrase, wildcard, proximity, range and more
- Fielded searching (i.e., title, author, contents)
- Sorting by any field
- Multiple-index searching with merged results
- Allows simultaneous update and searching
- Flexible faceting, highlighting, joins and result grouping
- Fast, memory-efficient and typo-tolerant suggesters
- Pluggable ranking models.

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8. In a lab environment, Sitecore 7 has been tested to handle well past tens of millions of content items and, long-term (with Apache Solr), can achieve billions.
9. The Sitecore solution is built completely with Microsoft .NET Framework technologies.

Plug-and-play options

Sitecore gives developers the option to easily integrate, if necessary, third-party components into the Sitecore platform. Sitecore has invested significantly in software development to make the search interface pluggable; Lucene can, literally, be unplugged from the Sitecore 7 environment and replaced with another search engine.

The developer link

As a companion developer technology, Sitecore has implemented Language Integrated Query (LINQ, pronounced "link"), a Microsoft .NET Framework component that adds native data querying capabilities to .NET applications. LINQ makes it much easier and faster for developers to build Sitecore environments that give marketers broad powers and fine control over the way content is searched and accessed.

Designed for global marketers

One of Sitecore's key architecture tenets, the separation of content from display, has always made it easy for companies to build and manage digital environments in multiple languages. These capabilities become even more critical as content volumes multiply, as they easily can with Sitecore 7.

Sitecore 7: Problems Solved

The new Sitecore release solves a multitude of real-world customer challenges.*

- "I have 1.3 million products, I don't need all the content to live in Sitecore but I want to be able to use all the feature and capabilities of the Sitecore Customer Engagement Platform."

- "My customers need to be able to refine their search results quickly; we want to easily be able to manage the search experience."

- "Our promotion department needs a way to prioritize featured products during a search, and de-position others."

- "I know my customers are using search words on our content that are not returning any results."

- "We want to constantly be changing the list of services featured on the home page. Choosing them manually takes too much time."

- "We need to develop and configure our new system *fast*. We've got to see ROI in the same year as the software purchase."

* Actual comments from Sitecore customers.

III. Massive Content Scalability: How Sitecore Achieves It

Every marketer is familiar with the "folders within folders" filing system that is the backbone of traditional content management systems. With its search-based architecture, Sitecore 7 frees marketers from the tedious filing that was previously required to make a personalized experience even possible.[10]

From folders to the bucket

Sitecore replaces the folder methodology with the construct of an "item bucket," a broad container that imparts meta information to the content as it is being placed in the bucket. Marketers no longer need to specify a (location) folder where the content resides in order for it to be accessible; merely by placing items in the bucket, content is enabled with search tags that render the items instantly searchable by any criteria the customer may use.

For example, on a travel site, an all-inclusive resort with a children's day camp could easily be filed by a marketer in a "family resorts" folder. But what about a "vegetarian" folder? Probably not — thereby making the resort much harder for a vegetarian traveler to discover on the site. By filing the content items associated with that resort, which offers a vegetarian food program, in the Sitecore bucket, all searchable aspects of that content are keyword-tagged and made available — including "family," "all-inclusive" and "vegetarian."
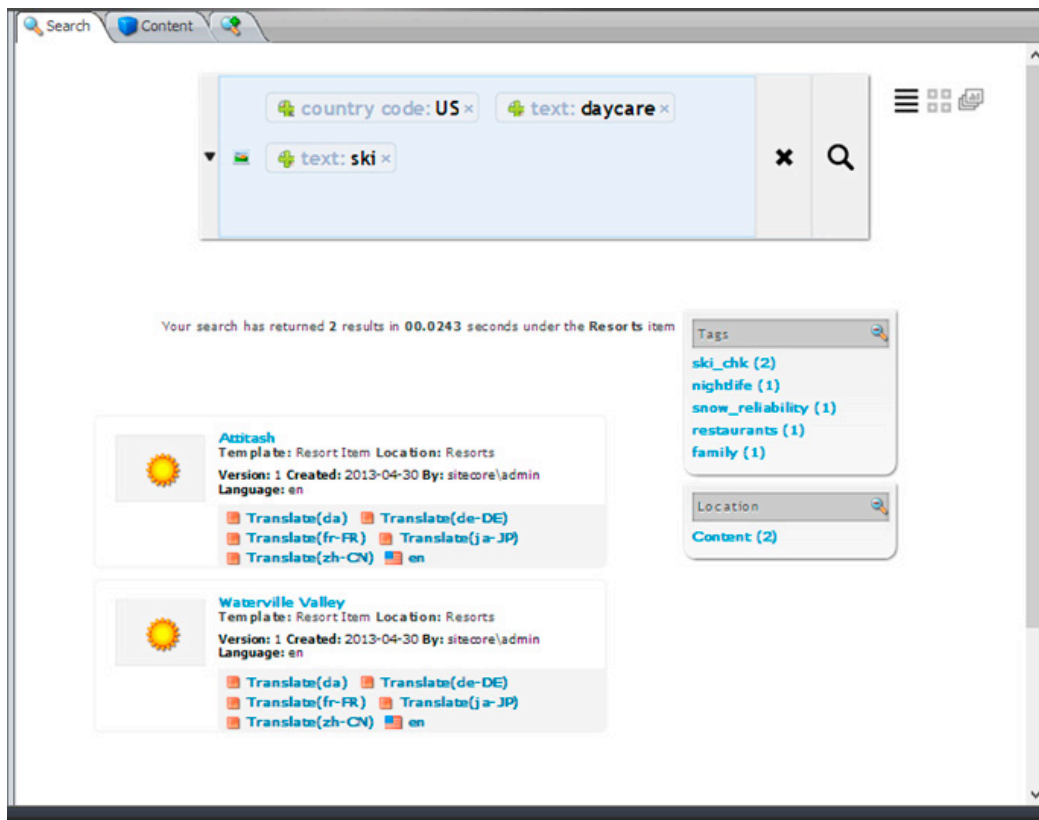

Figure 1: Sitecore 7 replaces folder-based content filing systems with an easy-to-fill "item bucket."

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10. Importantly, Sitecore customers with environments built in Sitecore 6 will be able to transparently utilize the new search-based features, functions and architecture of Sitecore 7. No hard-coded content port is required.

A larger universe of content

The Sitecore "item bucket" holds not only the content about the resort that the travel site directly creates or publishes. Sitecore 7 dramatically expands marketers' choices by allowing content from any source — internal, external[11] or user-generated — to be accessible and presented to the customer. In the all-inclusive resort example, the additional content could include reviews of the resort from sites like TripAdvisor.com or ebooking.com, posts from the resort's Facebook page, relevant Twitter tweets, and content from travel affinity sites like Frommers.com, to name a few. News and product information repositories are also easily incorporated; any type or amount of related content can be placed in the Sitecore bucket by a marketer, and thus instantly accessible to customers via search instead of time-intensive browsing.

IV. Sitecore Redefines the Search Experience

The search-based architecture of Sitecore 7 enables numerous improvements in the way customers experience search, and how marketers can control the way content is presented.

Curating the customer experience with search facets

Customers' ever-shrinking attention spans translate into precious few clicks and swipes that, if used on content that fails to engage, result in the certain loss of a visitor, possibly forever. The goal of any search, therefore, is to present the most relevant set of results in the least amount of time.

Sitecore 7's *search facets* put the power to curate search experiences directly into marketers' hands. In less than two minutes, a marketing user can create new search terms (facets) that allow visitors to search and filter on a new characteristic.

> In less than two minutes, a marketing user can create search facets that allow visitors to search and filter on a new characteristic.

For example, if rumors suddenly swirl that a particular candidate may be chosen as a European soccer team's new manager, marketers at the football club can quickly add the name of that candidate as a search term on the fan website, satisfying visitors who clamor to know.

Or, at a beverage company's website, the appearance of a legendary film hero drinking one of the company's products in a new movie can create a tsunami of Internet chatter, instantly. Marketers at the beverage company can monitor Twitter for related hashtags, and quickly incorporate these trending phrases as search terms on the website.

Sitecore's search-based architecture uniquely allows marketers to apply new facets to the customer experience; this capability can also be used to do back-end testing of potential searches, and then to modify users' search options. Most other content management solutions require the IT group to develop or, minimally, configure and test a new search facet. Only Sitecore gives marketers enterprise-class tools and capabilities to define and maintain search facets.

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11. Sitecore recommends that marketers follow the usage and attribution policies established by their companies when incorporating any third-party or externally created content into their digital environments.
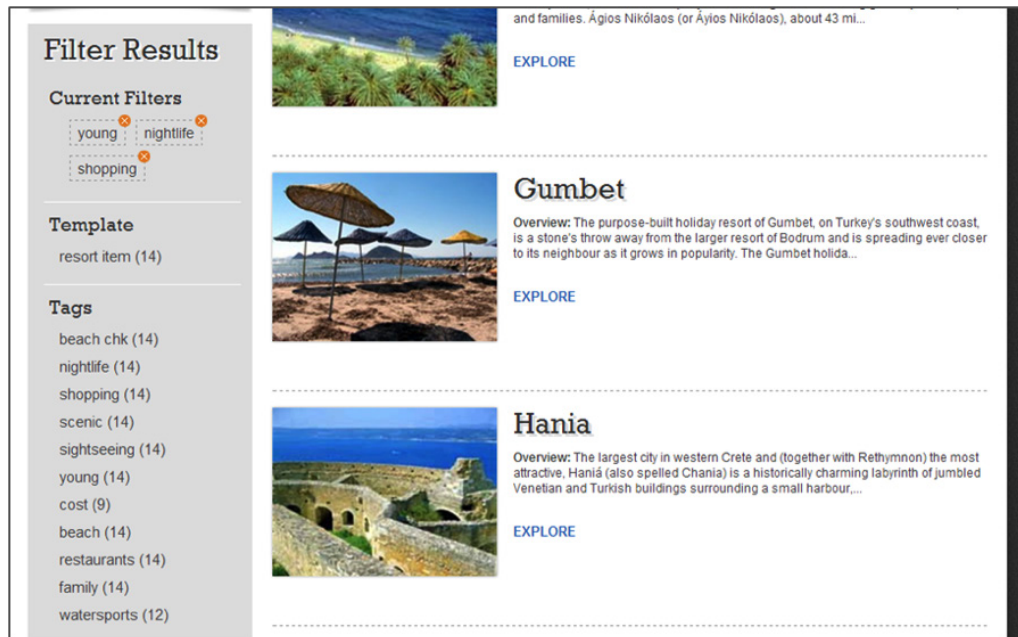
Figure 2: Search facets allow marketers to proactively enrich the customer search experience. The "Tags" list at the left shows the wide range of search facets available for the resorts a visitor is considering.

Search tagging provides granular control over results

Sometimes customers search on words or phrases that return insufficient or null results. For example, on a packaged food company's site, after a high-visibility news report on the rise of celiac disease, visitors will be searching for "gluten free [everything]." Certain products, such as jam, may be inherently gluten-free but had not been previously identified with search tags as a "gluten free jam," "gluten free jelly," gluten free snack" or "gluten free treat."

> Search tags are not metadata, but rather a semantic field that is used to shape search results.

Sitecore 7 allows marketers to use *search tagging* to quickly and easily assign search terms to content, ultimately returning that content in a search when the tag is used. Search tags are not metadata, but rather a semantic field that is used to shape search results. They can applied to an entire result set, and multiple or shared tag libraries can be created across websites.

So, in the jam example, the day after the news story about the rise in celiac disease, a marketer at the packaged food company reviews a report from Sitecore analytics that lists every search term used by visitors, sorted by most popular. She notices a spike in search terms with the phrase "gluten free," including "gluten free jam." The marketer takes the "gluten free" tag from the Sitecore repository and applies it to the company's line of jams and jellies. In addition, she adds the terms "gluten free jam" and "gluten free jelly" to the repository, ensuring that these products come up in associated searches.
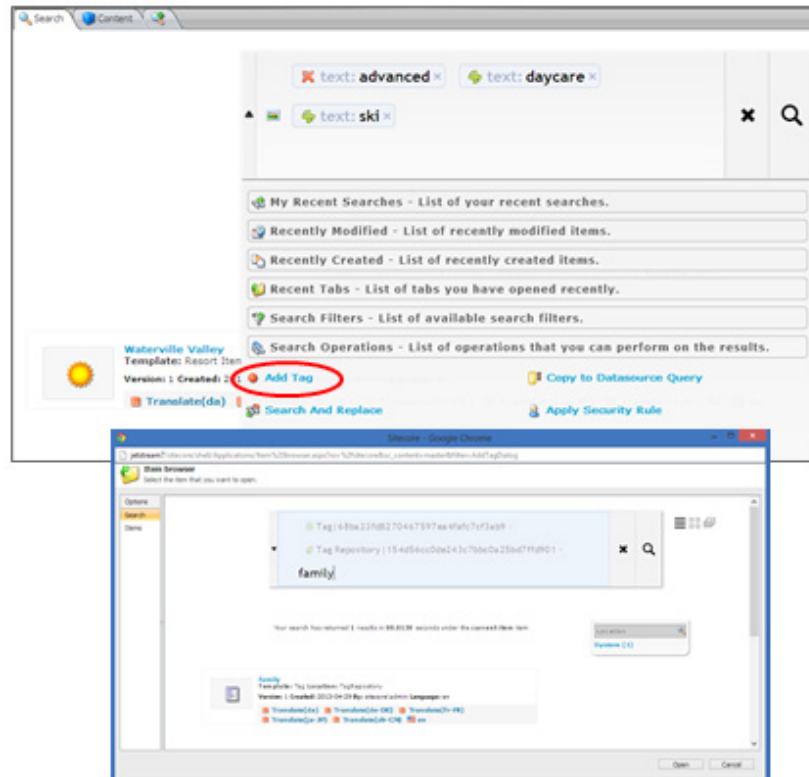
Figure 3: Sitecore search tagging allows marketers to move quickly and nimbly to deliver search results that met customer expectations. Here, a marketer is adding a "family" search tag on a travel site.

Again, Sitecore puts the power into marketers' hands, without requiring intervention by the IT department or developers. When marketers see which topics and search terms are trending, they can use search tagging to optimize the customer search experience in just minutes.

Influencing the experience with result boosting

Digital marketers are tasked with promoting an endless array of content and offers, based on constantly shifting conditions and parameters. The *result boosting* functionality of Sitecore 7 allows content to be pushed higher (or lower) in the result set of searches, based on marketer-defined rules.

Boosting rules can be created and maintained by business users with Sitecore's standard rules editor interface; with these rules, a boosting value is applied once a rule condition is satisfied. The value can either increase or decrease an item's position in the search results.

> Why boost results? Because visitors pay the most attention to the top five items their search returns.

For example, at a luxury travel site, a search query of "ski weekend" from a customer in France, in mid-November, would only produce a list of European ski resorts that have already opened for the season. European resorts that are not yet open would drop to the middle of the list, followed by ski resorts in the eastern US and Canada. Resorts in the western US would be at the bottom of the list. No South American ski resorts would appear on the list, given the low likelihood of snow in the southern hemisphere's spring season.

A particular Swiss ski resort that that the travel site is promoting could be boosted to the top of any appropriate results list by applying a high "boost factor." Marketers can also manually apply a boosting rule to one content item, and invoke the rule to see immediate results.

The ease and fluidity of search result positioning, coupled with the nearly universal customer behavior of paying attention only to the top five search results, illustrate the conversion power of result boosting.

Figure 4: Sitecore 7 integrates enterprise-class result boosting capabilities into the content management environment marketers use every day. Here, a marketer writes a rule to boost search results that contain "US."

Content queries enable variety and efficiency

The concept of "search" is so prevalent in the way that people use websites that its principles are often hard-coded into the content visitors see, without their conducting an explicit search. Sitecore 7 offers *content queries* that automatically retrieve and present content to visitors on a personalized basis. This capability makes it appear as if the Sitecore system were dynamically serving up content, when in fact it is producing the results of a pre-defined search query running in the background.

Sitecore 7 allows business users to build queries using a simple search interface, with personalization invoked by adding multiple queries for each component. For example, on a car brand's home page, a marketer can easily build a content query that presents customers who have used the site's "Build Your Car" configurator with a special offer from its finance arm.

> On a car brand's home page, a marketer could automatically present customers who have used the site's "Build Your Car" configurator with a special offer from its finance arm.

Like other search-enhancement features of Sitecore 7, content queries can be easily configured by a business user from a standard Sitecore 7 interface. Instead of forcing marketers to use a complicated database query builder, Sitecore starts the process with a keyword search.

Together, the greatly enhanced search capabilities in Sitecore 7 — search facets, search tagging, result boosting and content queries — empower marketers to transform the most fleeting of customer exchanges into profitable, satisfying interactions that help win customers for life.

V. Summary: Sitecore 7 in Action

The benefits of Sitecore 7's massive content scalability and control can be best illustrated in the context of the Sitecore Customer Engagement Platform, a unified solution for delivering multichannel marketing campaigns that are relevant, immediate and fully integrated.

For example, a teacher may receive a promotional email from an educational software company, inviting him to learn more about a new product. He opens the email on his school computer, clicks over to the site and searches on the name of the new product. In addition to the application's main product page, the company can serve up teacher-written reviews from educator sites, a recommendation from a colleague's Facebook page, and an offer for a free product trial. The software company can even boost a particularly appropriate piece of content — for example, an endorsement from a local educator — to the top of the search results.

> Sitecore 7 amplifies the power of the Sitecore Customer Engagement Platform, a unified solution for delivering multichannel marketing campaigns that are relevant, immediate and fully integrated.

Later, the company can send the teacher an email repeating the offer, which he opens on his smartphone and activates by accessing the company's mobile site.

Sitecore 7 helps marketers win customers for life

With Sitecore 7, Sitecore delivers the industry's first and only fully integrated search-based architecture — a critical differentiator that empowers digital marketers with new levels of content scalability, control and searchability. With Sitecore 7, marketers can engage in true context marketing by:

- Accessing and controlling tens of millions of pieces of content, generated by both internal and external sources.
- Easily using advanced techniques like search facets, search tagging, result boosting and content queries to gain greater control, choice and customization of customers' digital experiences.
- Taking advantage of search as a personalization technique, and deliver the individualized experiences that drive conversions and revenues.

For more information about Sitecore 7, please visit www.sitecore.net.

> With Sitecore 7, marketers at last can focus on using rich content to create engaging, personalized conversations that win customers for life.

Sitecore 7: Key Benefits for Marketers

- Search-based architecture frees marketers from content constraints, and scales to virtually unlimited content volumes
- Ability to manage more content means rich customization and deeper engagement
- More choice: Land just the right content in front of the right customer
- More control: Boost preferences and promotions to the top of search results.

About Sitecore

Sitecore is the global leader in customer experience management software for delivering the marketing that matters most — highly relevant content and personalized digital experiences that delight customers, increase loyalty and drive revenue. With Sitecore's fully unified, powerful, and easy-to-use software suite, marketers can focus on engaging customers instead of managing data — to deliver experiences that are relevant, immediate, and integrated across channels. More than 3,000 of the world's leading brands — including American Express, Carnival Cruise Lines, easyJet, Heineken, LEGO, Microsoft, and Nestlé — depend on Sitecore to help them deliver the meaningful interactions that win customers for life.