The Digital Relevancy Map

BY SITECORE BUSINESS OPTIMIZATION STRATEGIES (SBOS™)

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Executive Summary

A Digital Relevancy Map (DRM) is Sitecore's method of managing the creation of content in a way that delivers the greatest engagement and business conversion impact for key customer segments. Creating and optimizing a DRM for each of your top customer segments ensures you offer them the most engaging experience, nurture them toward purchase and inspire loyalty. We recommend DRMs for businesses in the *Radiate* stage of the Customer Experience Maturity Model as a foundation-building activity that supports more effective personalization techniques.

This white paper is intended as a "how-to" guide for your experience marketing team as they work to optimize your customers' experiences: channel managers, marketing researchers, content marketers, digital strategists, marketing technologists (familiar with the Sitecore Experience Platform) and digital analysts.

We discuss general and persona-based segmentation; selecting your key segments and documenting your customer journeys; and our recommended approach (with examples) to create and update your DRMs. The team process we recommend is an interactive, hands-on group activity that can be augmented by additional preparation and follow-up activities.

Why Digital Relevancy Mapping

Being able to address, and even anticipate, customer needs is more important than ever for effective context marketing, and organizations need a structured approach to create the most relevant experiences.

Digital Relevancy Mapping prepares you to create the most relevant content for your key user segments (including personas). If you follow the process outlined in this white paper, your customers will find content and functionality with topics that fit their personas or their segments at each stage in their decision journey. Following this approach will help you move your customers through their decision and buying journey more quickly because they will receive the right content, at the right time, in their preferred channel, and with the right calls-to-action that anticipate their needs. Further, this process will increase their affinity and trust in your brand because they recognize and appreciate that you understand and help them find what they're looking for.

Without a rigorous digital relevancy mapping exercise, you are likely to end up with generic content that doesn't address the unique needs of your segments, and therefore fails to effectively nurture them toward increased engagement and conversion. Creating DRMs using your cross-functional digital team gives you a clear, prioritized, focused and aligned content marketing process. DRMs are also the foundation for an effective personalization strategy in the *Optimize* and *Nurture* stages of your Customer Experience Maturity. Note: While this relevancy mapping approach can be extended to your overall customer engagement planning, our focus here is on the digital channels.

While you may encounter some organizational resistance, be assured that this effort should not last more than a few weeks and will only take a few days of work time for the broader team; the process is equivalent in effort and cost to a usability study or a large survey effort. While you may hear "we already have marketing research," know that research is a good start, but it's not sufficient. This DRM work will provide several critical advantages, including:

- Focus marketing work on the 20% of content that is responsible for 80% of engagement.
- Gain insights regarding innovative offerings.
- Gain organizational alignment around context marketing and the customer experience.
- Reduce "random acts of content."
- Enable content developers to focus on customer/user intent, as well as the appropriate goals and CTAs for each stage in the lifecycle.
- Help identify where and what to test to improve engagement and conversion rates.
- Identify missing content and functionality (as well as the optimal channel).
- Accelerate customers through their journey.

In the following pages, you will learn how to develop your organization's DRM to:

- Identify your most important customer types using visitor segmentation and personas
- Map your customers' journeys

- Identify the channels that are best suited for each segment and stage in the journey
- Identify the needs/intent, your digital goals and the content for each segment and stage in the journey

Let's get to work!

Step 1: Selecting and Characterizing Segments for Your Digital Relevancy Map

Most organizations have a specific set of users who they focus on as current and potential customers and understanding them is essential to connect and engage with them. You are likely already investing in research to identify segments, understand their needs, psychological triggers, and intent in each step in their journey.

Organizations use various customer segmentation schemas as well as personas (also based on a segmentation approach). The objective is to identify and characterize them in terms of their intent, so you can create content that will generate the most engagement, build trust, and nurture them toward conversion on your most important goals.

General Customer Segmentation

A segment is a group of visitors who share similar characteristics and have been determined to benefit from the same experience. Segments can be defined by a variety of dimensions such as:

- **Audience Type:** Profiles of distinct user groups who have very different roles, interests and journeys (e.g., patients vs. doctors; parents vs. educators; customers vs. job seekers)

- **Stage in Journey:** Profiles based on specific steps in a buying cycle such as: explore, shop, evaluate, purchase, service, advocate. Think of content consumption by segmentation stage. For example, presenting "About Us" content might be mapped to an early-stage customer. Products might be mapped to the later stages of a customer lifecycle.

- **Product/Service Categories:** These profiles help you understand which specific product or service a customer is most interested in.

- **Industries:** Profiles based on a specific industry or domain of business.

- **Personas:** Sitecore allows you to predefine personas. With Sitecore, you can map a browsing customer to a persona segment based on the content they are browsing, and use that as the basis for personalization. We will discuss this further later on in this white paper.

Segments are used in Sitecore to target specific content to specific groups of visitors. For rules-based personalization, customer segmentation with Sitecore organizes users who have similar characteristics identified by explicit data, such as:

- GeoIP
- Search Keywords
- Internal Search Keywords
- Channel
- Visit Number
- Goal Converted
- Referrer
- Campaigns
- New Visitors
- Landing Page
- Registered Visitors
- Sections or Pages Visited
- Registration Detail
- Date Visited
- Device

Examples of visitor segments that use explicit identifiers are:

Segment	Description	Explicit Data
Newbie	New visitor	▪ First visit ▪ PPC landing page ▪ Search engine
Returning Visitor	Visited at least once in past 30 days	▪ Days since first visit ▪ PPC landing page ▪ Search engine
Interested Visitor	Registered and downloaded special offer	▪ Registration details ▪ Deep page views ▪ Email landing page
Purchaser	Has made a purchase on the site	▪ Registration detail ▪ Landing page ▪ Completed purchase

Personalization based on explicit segmentation employs rules-based (if/then) personalization. Since we have unambiguous explicit data about users in those segments, we do not need to evaluate their content consumption and compare them to profiles to determine if they belong to that segment. In fact, with most explicit segmentation schemes, we can identify them as belonging to a specific segment as soon as they arrive on our digital channels.

Personas

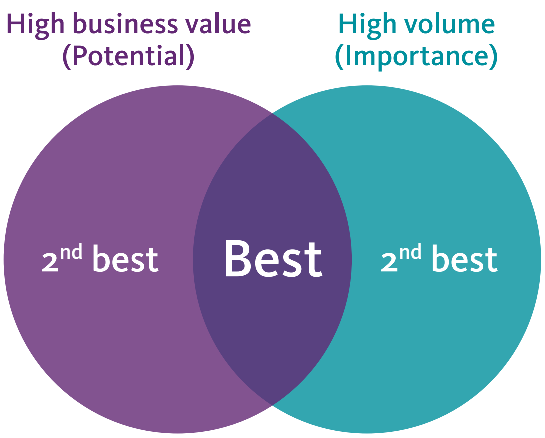
Personas are "archetypical" visitors/users of your digital channels that represent the needs of larger groups of users in terms of their behaviors, goals, needs and emotions, particularly in relation to their digital journeys. They act as 'stand-ins' for real users and help guide decisions about functionality and user experience design and are essential to good, user-centered design and personalization. More advanced segmentation schemes use multiple dimensions (e.g., demographics, psychographics, and behaviors) to create segments to give a realistic representation of these key audience segments to make it your marketing, sales and customer service teams. They are created using qualitative and quantitative user research and web analytics.

We recommend creating between three and five primary personas that are sufficiently different in behaviors so you can clearly identify them by their content consumption and therefore be able to provide differentiated experiences. With the addition of quantitative research (e.g., cluster analysis of survey results), you can estimate the relative size and relative value of each persona segment.

Personas are also used for predictive personalization. Later, you will create profiles for each persona in the Sitecore Experience Platform, and assign them to content that is, largely, uniquely relevant to that persona. Based on content consumed, each visitor is classified according to which target group or persona he or she most closely matches and then you can use this information to dynamically change all or part of your digital content to show only what is most relevant to the user, bringing them closer to the action you would like them to take.

If your organization has very little research to rely on, you can still create "proto-personas" based on your team's current knowledge as a starting point. For more information on creating personas, please refer to "Best Practices for Developing Personas with the Sitecore Customer Engagement Platform."

Selecting Customer Segments



Selecting Your Top Segments

When beginning with personalization, it's most helpful to focus on identifying the biggest segments where you have the most opportunity to engage. To identify key segments, we recommend using the PIE (Potential, Importance, Ease) model:

- **Potential:** How much potential do you have to increase visitor engagement by personalizing the experience, and what potential increase in business value can accrue (ROI)? Use information about the value gained from engaging each segment and your understanding of the possible potential improvement in engagement. Your top potential segments should align with your top business goals.

- **Importance:** How big is the segment? The general rule is the bigger, the better; however, segments known to have low engagement should have lower priority. Your web analytics can yield good information to help with these decisions.

- **Ease:** How easily can you identify a visitor who belongs to a certain segment? Here, it's best to consider the speed at which you can assign a visitor to a segment (i.e., preferably as soon as possible after they arrive on your site). The identification should be based on session data, and later, with more effort, you can base them on CRM or social data. Also, your top persona segments should also be included, even though they are by definition harder to identify within one or two clicks.

We recommend that you start with segments that have the most potential (business value) and importance (size); then you can move on to focus on those that have lower importance but high potential (business value).

Documenting Your Top Segments

Whether a segment represents an explicit group of visitors or a persona, you need to identify the characteristics of your top three to four primary customer segments. Use your current customer research and web analytics to complete a table that summarizes their characteristics. While each organization will create their own, we recommend the following table formats.

Here is an example of an explicit segment:

Segment	Characteristics	Identifiers	Primary Channels	Customer Intent	Content Example
Newbie (example)	▪ New to our experience ▪ No knowledge ▪ May need help and special offer to register	▪ New visitor ▪ Days since first visit ▪ PPC landing page	▪ Search ▪ PPC	Learn basics about offers and competitive comparisons	Home page experience that drives to learn pages
Segment 2					
Segment 3					
Segment 4					

Here is another format focused on capturing additional demographic and psychographic persona details (example is for an online-only employment service):

Segment/ Persona	Demographics	Psychographics	Key Customer Goals/Intent	Identifiers	Content & Functionality Desired
Traditionalist (30%)	**Status:** Passive **Title:** Marketing Analyst **Salary:** $48,000 **Industry:** Manufacturing **Education:** B.S. **Age:** 32	"I need a site that helps me grow professionally, not just find a job."	▪ Find and compare jobs ▪ Get advice and content to help transition her career	▪ Use of passive focused tools ▪ Use of sophisticated tools ▪ Use of career counseling content	▪ Powerful search tools ▪ Job comparison tool ▪ Searchable categories ▪ Job listing ratings ▪ Resume folder ▪ Access to most relevant training for goal career/ counseling

Go Getter (12%)	**Status:** Active **Title:** Director, IT Training **Salary:** $75,000 **Industry:** Healthcare IT **Education:** B.S., Masters **Age:** 38	"I am always keeping my eyes open for new opportunities."	■ Quickly become aware of new opportunities ■ Search and compare jobs ■ Tools to make her search more effective ■ Find her next opportunity	■ Use alerts ■ Conduct a lot of searches ■ Created portfolio	■ Improved alerts ■ Powerful search tools ■ Easy job app process ■ Job comparison and selection tool ■ Resume folder ■ Searchable categories ■ Job listing ratings
New Grad (18%)	**Status:** Very Active **Title:** Part-time Rep. **Salary:** $26,000 **Industry:** Retail/ Wholesale **Education:** B.S. (in progress) **Age:** 23	"Man, this is more involved than I thought! How do I get my foot in the door?"	■ Search and apply for jobs ■ Find tips on how to structure his resume ■ Find content specific to his situation	■ Use resume building tools ■ Read beginner content ■ Conduct company research ■ Use alerts ■ Conduct a lot of searches	■ Resume building tools ■ Search and application process assistance ■ Guided, smart help ■ Beginner career information ■ Company research

Step 2: Developing Your Customer Journey Map

What is a Customer Journey?

The customer journey is the complete series of experiences that customers go through during their lifecycle and includes all of their interactions with your brand and organization. Customer journeys have become quite complex over the past decade, with customers using different channels and touchpoints to interact with your brand and their peers as they move from interest to consideration to purchase and beyond. Their journeys typically involve viewing and researching content on your website; participating in a social media event; using your phone app; reviewing competitive websites and research; etc.

Today, customers are in complete control, and they progress through their engagement with your brand on their own terms. That said, there are similarities in how segment participants engage through their customer journey, and if you provide them the experiences that help them along the way, you'll not only achieve your marketing objectives, but also ultimately turn them into lifetime customers.

It is important to understand each stage in the customer journey so you can evaluate whether you have the right channel, right message and right content for each stage. Your planning process will ensure you have all stages mapped fully and help you identify opportunities to enhance the experiences you provide.

Most customer journeys look something like this:

The Customer Journey

There may be different journeys for each of your most important visitor segments. For example, in a B2B scenario, a business analyst may enter the journey in the Awareness or Research stage, whereas a senior decision maker, after reading recommendations from the research phase, may enter at the Evaluation stage.

Many actual user journeys involve repeated engagement through several stages until they finally become qualified leads and customers. Designing a journey that allows a user to take baby steps, gradually increasing their engagement and commitment at their pace, is critically important to optimize your results.

At key points in the journey, marketers should insert goals that test a contact's readiness to move to the next stage. For example, you might suggest a visitor download a key document or discount coupon in exchange for their registration information.

Defining and Describing Your Customer Journey Map

There are many techniques for developing a customer journey map. For an extensive recent review of alignment diagrams and other methodologies, we recommend the book, Mapping Experiences by Jim Kalbach (2016).

We recommend that you use the concise approach described below, beginning with assembling a cross-functional team of 10-15 customer researchers, channel marketers, strategists, sales representatives, customer service managers, content managers and a digital analyst. It is important that the participants are the ones ultimately accountable for execution and the outcomes of your experience marketing efforts. The investment of the team's time up front will accelerate results as it will improve their understanding and empathy for customers, provide a common understanding and vocabulary, and enable focused, consistent execution. Further, these maps are helpful in bringing new team members up to speed on the business.

Your team can brainstorm the customer journeys for your top segments, which will help you arrive at an aligned position regarding defined major steps. If you have very different top segments, you could split the team into 2-3 groups, each creating a journey for a top segment. For example, if your company is a healthcare services provider and your website services both patients and doctors, you may choose to have one team focus on the patient journey and another on the doctor journey.

The teams will work progressively through four steps, adding a row of sticky notes under the appropriate journey stages for each of the following categories:

1. Steps in the customer journey
2. Definitions of each stage in the journey
3. Customer touchpoints for each stage
4. Key customer activities in each step

We will use a simplified illustration of how a cruise operator marketing team can arrive at the journey map description.

Step 1

The team brainstorms using large sticky notes and arrives at a consensus regarding the journey steps.

Step 2

The team should discuss and summarize the description of each stage using sticky notes again to help visualize the process. It is important your team develops common definitions and aligned understanding to inform all subsequent work. You may elaborate later as your team develops messages or use cases for personalization.

Step 3

Once the team arrives at a description of each step, they should discuss the different channels and touchpoints that customers use to interact with your organization in each step in the journey. This should include any touchpoints, including offline, so that you have a complete picture.

Step 4

Once the team completes descriptions of top touchpoints, you will brainstorm the key customer activities in each journey step. These could be actions taken in your channels, but can also include actions they take on competitor websites or social channels. Make sure that they focus on the user and not be centered on your owned or paid channels.

	Customer Journey Stage	DREAM	EXPLORE	BOOK	MANAGE (post-booking, pre-travel)	TRAVEL	POST TRAVEL
Step 2	Description	Dream about vacation and become aware of high-level options	Research and compare realistic cruise options	Easily plan, select and book cruise details	Confidently manage post-booking and complete purchase	Enjoy the cruise experience and address service issues	Share memories and advocate to friends and family
Step 3	Touch Points	■ Online Campaign ■ Media (many) ■ Travel Sites ■ Review Sites ■ Brand websites ■ Social ■ Friends WOM	■ Search ■ Online campaign ■ Brand Sites ■ Travel Sites ■ Travel agent	■ Brand sites ■ Chat ■ Contact Center ■ eComm ■ Travel Agent ■ e-mail	■ eComm ■ Contact Center ■ Travel Agent ■ e-mail	■ On board Kiosk ■ In Person ■ On-board mobile app ■ brochures	■ Social Media ■ E-mail ■ Travel Sites ■ Review Sites ■ Contact Center
Step 4	Customer Activities	■ View ads ■ Click through ■ View videos ■ Read blogs ■ Compare types of vacations ■ Get advice	■ Explore ■ Compare ■ Identify preferences ■ Identify budget range	■ Select dates ■ Find specific itineraries that match preferences ■ Discuss with agent ■ Create profiles and Book	■ Make itinerary changes based on additional plans ■ Finalize travel, prices, insurance ■ Pay adjustments ■ Print trip documents	■ Enjoy experiences in itinerary ■ Manage services ■ Handle issues ■ Pay/use additional upsells on-board ■ Travel home	■ Share content with family and friends ■ Provide feedback ■ Rate/review ■ Manage post-travel adjustments/ refunds ■ Begin dreaming again...

(The header row is labelled **Step 1**.)

Remember, you will need to create a similar table for all key segments to the extent that their journey is substantially different from that of other segments. For example, end customers are substantially different from business partners; doctors are quite different from patients; and regulators are quite different from researchers.

You can see additional templates on www.connecttheexperience.com/templates

Now that you have identified your most important segments and personas, as well as defined key segment characteristics and user journeys, you are ready to create your Digital Relevancy Map.

Step 3: Creating Your Digital Relevancy Map

The Digital Relevancy Map (DRM) is a planning framework that captures the content and functionality appropriate for your major segments at each stage in their customer journey. Completing the DRM helps ensure you have the most important content on your digital channels and is also critical for later-stage focused content planning for all types of personalization, especially if you are planning to use predictive personalization.

Your DRM is unique to your organization, but we recommend that you start with the basic approach we've outlined here and then add to it later as necessary.

The creation of the DRM is another opportunity to build internal alignment and focus on the external user, and we recommend that you invest in a workshop activity similar to that described for building the customer journey. Ideally, the same cross-functional team (10-15 people) will create the DRM to maximize continuity and cohesion.

The basic DRM has the following format:

The exercise involves the team creating a single DRM or multiple DRMs for the top segments that were identified in Step 1. We find that two to three DRMs are the ideal starting point, as they surface key differences between what is needed for each segment. Similar to Step 2, the team should utilize large sticky notes to identify elements ("cells") in the DRM, as they make it easy for each team member to concisely capture thoughts and help the team iteratively revise table components.

Customer Journey Stages

Segment XYZ	Awareness	Consideration	Purchase	Use	Advocacy
Customer intent					
CTAs/Goals					
Persuasive Content					

The following is a short description of each of the rows in your table:

Customer Intent	▪ Describes the customer intent at that stage of the journey. ▪ Examples: explore options or narrow alternatives, compare to competitive offering, find specific product, check out of a shopping cart, and receive service.
Digital Goals/ CTAs	▪ Digital goals are actions we want customer to take on our digital channels. We want the customers to convert on them, which nurtures them toward our marketing objectives. You can record them as CTAs but it is important to know the underlying digital goals. ▪ Examples: download information, use calculator, register, create account, sign up for updates, purchase, use on-site mobile app, rate, share.
Persuasive Content/ Functionality	▪ The information, assets, videos, pages and tools that are appropriate to help customers from this segment, at this stage in the journey, to fulfill their intent. ▪ This content helps us engage in a way that will nurture and progress them toward the next journey stage and later allow us to profile them as belonging to this segment. ▪ This content also should clearly differentiate our experiences and offerings from those of our competitors. ▪ Examples: segment specific galleries or sections (e.g., industry, application, product), white papers, webinars, testimonials, calculators, tools, mobile apps and social content/tools.

With sticky notes, your team will evolve a table that may, structurally, look something like this, with each of the sticky notes in the center describing an intent, a goal or key content:

To illustrate this process for a general DRM, we'll continue with our cruise operator example taking advantage of any information that has already been developed in Step 2. Remember that for a complete workshop, you should have several DRMs developed. In the cruise operator example, you might have one for the young family travelers, one for romantic cruise travelers and one for reunion travelers.

Step 3a: Customer Intent

The customer intent is the most important intent our customer has when they are at a particular stage of their journey. This information could be derived from the information developed in Steps 1 and 2. Make sure you consider not just today's intent, but also how customer expectations and behaviors might evolve so that you can address their near-term expectations as well.

Step 3b: Your Digital Goals

Your next task is to document the digital goals you want the customer to take action on (e.g., convert) to nurture them toward your business and marketing objectives. You can document them as CTAs, but it is important to know the underlying digital goals. Typical examples of digital goals include: download information, use calculator, create account, sign up for updates, purchase, use on-site mobile app, rate, and share.

Your digital goals should be aligned with your strategic and marketing objectives. The strategic objectives are what the organization aims to accomplish, such as increasing revenue, expanding brand awareness, increasing sales, increasing basket size, increasing profit margin, increasing customer lifetime value, and so on. Marketing objectives are the objectives the marketing team must accomplish to achieve the strategic objectives. For example, to achieve the strategic objective of increased revenue, marketing might use objectives like increase prospect acquisition or increase basket size.

Digital Goals in Sitecore drive marketing objectives through digital conversions. Visitors must take an action to complete a digital goal online. Most often, completing a digital goal progresses the visitor further along in their journey (achieving the marketing objectives).

Goals and Engagement Values

Different digital goals have different value for accomplishing your organizational goals. For example, reviewing a blog post or viewing a video is typically less valuable than registering for an event, completing a profile, or purchasing a product.

As part of preparing to implement Sitecore analytics, your team will work to identify, rank and assign relative values to the digital goals relevant to your digital channels. Sitecore provides extensive guidance for that activity in "Engagement Value Best Practices."

For the DRM, you will document goals that have already been defined and prioritized in the activities mentioned above or brainstorm new goals during the actual DRM workshops. You will want to make sure that key high-value goals (e.g., create account, purchase), as well as new goals (those identified by the team, but which are not yet in your digital channels), are included.

Step 3c: Content

The final step is identifying the content needed for each stage in the customer journey to most effectively enable customers in each segment to meet their intent and to get them to convert on defined top digital goals. "Content" is a broad category that includes general and segment-specific information, such as white papers, testimonials, application notes, galleries, videos, pages, blogs, surveys, social posts, mobile app functionality, calculators and other tools.

This content helps you nurture your customers toward the next stage and allows you to profile them as belonging to a particular segment. It should also clearly differentiate your experiences and offerings from those of competitors.

A simplified completed DRM for the cruise operator may look like this when your team is done:

Customer Journey Stage	DREAM	EXPLORE	BOOK	MANAGE	TRAVEL	POST TRAVEL
Customer Intent	■ Dream and explore vacation travel options, including a cruise ■ Learn about brands and options	■ Research and compare realistic cruise options	■ Easily plan, select and book cruise details ■ Experience no surprises	■ Confidently manage post-booking travel adjustment and complete purchase ■ Prepare for upcoming cruise	■ Enjoy the cruise (included and a la carte) ■ Address mid-cruise itinerary changes and service issues	■ Easily share memories with family and friends ■ (perhaps) begin considering future travel
Digital Goals/ CTAs	■ View testimonials ■ View videos ■ View social content, UC	■ Use cruise selection/ planning tool ■ View and save specific trips ■ Request brochure ■ Register for savings ■ Create account	■ Compare itineraries ■ Use planner ■ Create profile(s) ■ Find professional ■ Request quote ■ Pay	■ Add traveler info ■ Buy upsells ■ Book ■ Pay	■ Online check-in ■ Book onshore travel Book entertainment ■ Update itinerary (with upsells) ■ Register concern or requests ■ Enter contest ■ Pay	■ Share UGS to social ■ Share with friends (email) ■ Rate, review of social ■ Explore opportunities ■ Give feedback
Content	■ Inspirational vacation ideas ■ Cruise vacation highlights ■ Social campaigns	■ Cruise themes & destinations ■ Specific cruise content ■ eBrochures ■ Cruise selection tool ■ Ship explore tool ■ Why us?	■ Cruise planner tool (detailed) ■ Detailed cruise itinerary content ■ Deals ■ Insurance ■ Gift cards ■ Forums ■ Why us?	■ Special discounts for cross sells and up-sells ■ Social sharing tools ■ Shore Excursions ■ Forums	■ Schedules ■ Time-limited Elite Club Discount offers ■ Free experience en-route ■ Segment specific activities content ■ Contests ■ Social sharing tools ■ Mobile app with real time alerts & info. ■ Content ■ In-room shopping	■ Inspirational content ■ Social sharing tools ■ Elite Club content ■ UGC contests ■ Feedback survey ■ Forums

When conducting this portion of the team exercise, make sure you explicitly work to identify content that is not yet available, particularly as it relates to the unique, evolving intent of the segment the team is working on. Having identified the key touchpoints in Step 2, make sure you provide the best experience in each touchpoint. For example, the team working on the cruise operator DRM for the young family segment many identify the need for family activity galleries, planners, testimonials, and schedules or on-board mobile games for young vacationers. Also, instead of "cruise vacation highlights" you might have "family cruise vacation highlights" for the young family segment or "romantic cruise vacation highlights" for the romantic traveler segment. Similarly, for the romantic traveler, "free experience en route" can be replaced with "The fun never stops – dance the night away on us!"

Some experience marketing teams choose to include additional information in an expanded DRM, which can be completed and added after the workshop. Here are some examples:

Category	Description
Our Objective	▪ Describes the business objective for this part of the journey. Generally, the objective is to address the customer intent in a way that helps them make decisions that move them forward in their user journey.
Touchpoints	▪ Includes touchpoints in channels where the customer is engaged to offer opportunities for personalization. Touchpoints come from the earlier workshop activity in Step 2. ▪ Examples: website, mobile site, email, POS, social channel, contact center
How Intent is Revealed	▪ Describes explicit and/or implicit user behaviors that reveal the customer intent. ▪ Examples: keywords, campaign entered from, site sections visited, assets downloaded, and use of tools or calculators, social sharing.
Moments Of Truth (MOT)	▪ Originally popularized by Google in 2011, MOTs are the key customer experiences throughout their lifecycle. There are four MOTs: a) the Zero Moment of Truth (ZMOT)—the moment a user decides to buy a product in a category (but not necessarily your product); b) the First Moment of Truth—the moment your user considers purchasing your particular product or service; c) the Second Moment of Truth—when your customer experiences your product or service for the first time; and d) the Ultimate Moment of Truth (UMOT)—when your customer shares their experience with their social network. Their UMOT becomes their friends' ZMOT. ▪ Identifying theses enables you to focus on goals and content that have the most positive impact on the user at that MOT. A short article on this topic by Brian Solis can be found at: http://www.briansolis.com/2013/11/the-ultimate-moment-of-truth-and-the-art-of-engagement/
Key brand Messages	▪ These are differentiating brand messages aligned with your brand and unique value proposition for the lifecycle stage. Documenting key brand messages helps your content team craft effective content and CTAs.
Psychological Triggers	▪ These are psychological triggers which anchor your CTAs, such as: social proof, exclusivity, reciprocation, commitment and consistency, liking, authority, and scarcity.

Matching and Evaluating Content for Your DRMs

When planning a brand new website, your DRM will include ideas for the new content. When you have an existing website, you should also make sure to audit the existing content and map it to the DRM. After the workshop, you can do it more systematically by inserting your content tree into a spreadsheet (rows) and inserting columns for each segment you want to focus on (columns), noting in each cell whether the content is relevant to that segment. Continuing with the cruise operator example, here is a simplified illustrative content inventory:

Top Segments

Content	Young Family	Romantic	Reunion	Frugal	etc.
Why us	X	X	X	X	X
Explore					
Family cruises	X			X	
Romantic cruises		X			
Budget cruises				X	
Holiday cruises	X		X	X	
River excursion		X	X	X	X
Cruise to					
Caribbean	X	X	X	X	X
Europe	X	X	X	X	X
Asia	X	X	X	X	X
Alaska	X	X	X	X	X
Vessels					
Vessel 1	X	X	X	X	X
Vessel 2		X	X		
Vessel 3	X			X	
Book	X	X	X	X	X
Manage	X	X	X	X	X
Customer service	X	X	X	X	X
Deals	X			X	X
Community	X	X	X	X	X
About	X	X	X	X	X

In completing this exercise, you may also find that some of your current content has low relevance to your top segments, allowing you to reduce investment in that area.

Also, when planning for creating or redesigning mobile websites or applications in particular, we recommend that you create a mobile-specific DRM. Such a DRM will reflect user intent, relevant goals and content associated with users who are on-the-go in a specific location. Information about nearby business locations (e.g., retail, automotive service, and new home sales) or activities (e.g., travel, cruises, zoos, and museums) could be provided to help move customers toward conversion.

Revising the DRMs for your key segments should become part of the ongoing activities of your content team. If new content does not fit in the DRMs, you should question whether it is useful at all.

If your team has conducted surveys to evaluate the importance and satisfaction users have with various content and functionality, you can also leverage insights from that work regarding priorities using opportunity score. An opportunity score can be calculated as the Importance Score, plus the (Importance minus Satisfaction) score. For example, if the Importance Score is 8 and the Satisfaction score is 4, the Opportunity Score is (8 + (8-4)) = 12. If your surveys cover a wide range of customer details, you will see clear differences across customer segments as well. Research shows that users are not very good at evaluating future features or content with which they have not yet had direct experience; therefore do not put too much emphasis on those evaluations when considering new experiences.

Marketing Check List for Creating Digital Relevancy Map

- Key digital goals
- Key segments identified based on analytics and customer research data (validated with PIE)
- Insights about key customer segments
- Descriptions of key segments
- Customer journey maps for key segments
- Insights about digital content performance
- Content inventory
- Digital Relevancy Maps

About Sitecore Business Optimization Strategies

Sitecore Business Optimization Strategies (SBOS™) partners with customers and partners to accelerate context marketing transformation. SBOS™ shares best practices on tactics, process, methodology and organization to realize business value and increase customer experience maturity. It's a business-centric, data-driven context marketing process that accelerates successful project outcomes and reduces business risk.

The Sitecore Business Optimization Strategies team supports Sitecore customers and implementation partners through their transformation from marketing with a brand-centric, static web presence to marketing with a personalized, contextual, omnichannel digital platform that creates great customer experiences and builds customer loyalty.

The SBOS™ team can help you work smarter and deliver better outcomes through a continuously updating set of practices, methodologies, tactics and tips developed across Sitecore's ecosystem of customers and partners.

Resources

Brian Solis article on Moments of Truth
http://www.briansolis.com/2013/11/the-ultimate-moment-of-truth-and-the-art-of-engagement/

Engagement Value Best Practices
http://www.sitecore.net/resources/white-papers/sitecore-engagement-value-best-practices

Customer Journey Map Templates
www.connecttheexperience.com/templates

CX Maturity Assessment
Find more about the Customer Experience Maturity Assessment and find out how your organization scores: http://www.sitecore.net/getting-started/maturing-digitally/cx-maturity-model