



Marketing Automation and Web Personalization with Drupal: An Introduction

Jason Want

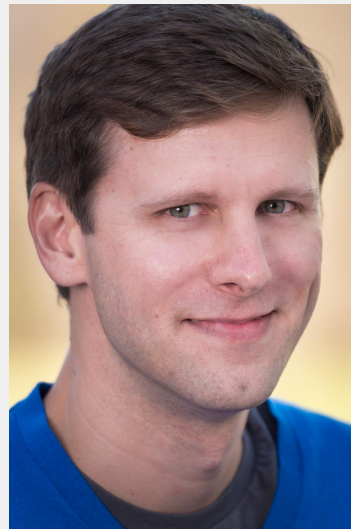
Drupal Lead Architect

Jason has six years of experience working with Drupal as a site architect and builder, themer and developer. His passion for Drupal has led him to become increasingly involved within the Drupal community as a co-organizer of Drupalcamp New Orleans and DrupalCon New Orleans track chair. He is frequently a presenter at monthly Louisiana Drupal user meetups.

 @jasonawant

 /in/jasonawant

 /u/jasonawant



1 Web Personalization

2 Personalization Checklist

3 Marketing Automation

4 With Drupal

Mediacurrent helps organizations **build highly impactful**, elegantly designed Drupal websites that achieve the **strategic results they need**.

- Single-source provider
- Specializing in **Drupal since 2007**
- Headquartered in **Atlanta, GA**
- Team of **60+ Drupal Experts** including development, design and strategy
- Clients include: Large Enterprise and **high-profile global brands**



1 Web Personalization



Web Personalization

- What is it?
- Why use it?
- Available Solutions



Web Personalization: What is it?

Personalized web experiences based on the **characteristics** (interests, social category, context, etc.), **actions** (click on button, open a link, etc.), **intent** (make a purchase, check status of an entity), or any other parameter that can be identified and associated with an individual, therefore providing them with a tailored user experience.

Personalization Criteria

- Implicit vs. explicit criteria
- First vs. third party data
- Non-personal and personal attributes
- User Interactions

Implicit

Implied though not plainly expressed

Inferred intent from user interactions

Examples

- Page visits
- Menu navigation
- Call-to-action clicks

Explicit

Stated clearly and in detail, leaving no room for confusion or doubt.

Self identification or self selection

Examples

- OS, Browser, device, geolocation
- Profile or contact form
- Topical newsletter registration

First party

Information you yourself have collected about your audience

Examples

- Website, email, and marketing automation software
- Meetings and events
- Personal conversation and correspondence

Third Party

Data that acquired from a multitude of outside sources.

Examples

- Social platform integrations
- Demandbase, SalesForce, Hubspot

Non-Personal

Automatically detected non-personally identifying attributes.

Examples

- IP address, location, device, browser, OS, time of day

Personal Attributes

Self identification or self selection

Examples

- Age, gender, language preference, interests
- Registration form

User Interactions

Use a site visitors interactions to build a visitor profile to incorporate into a personalization strategy.

Examples

- Date and time, referring pages, click path,
- On site searches
- Form abandonment

Personalization Example

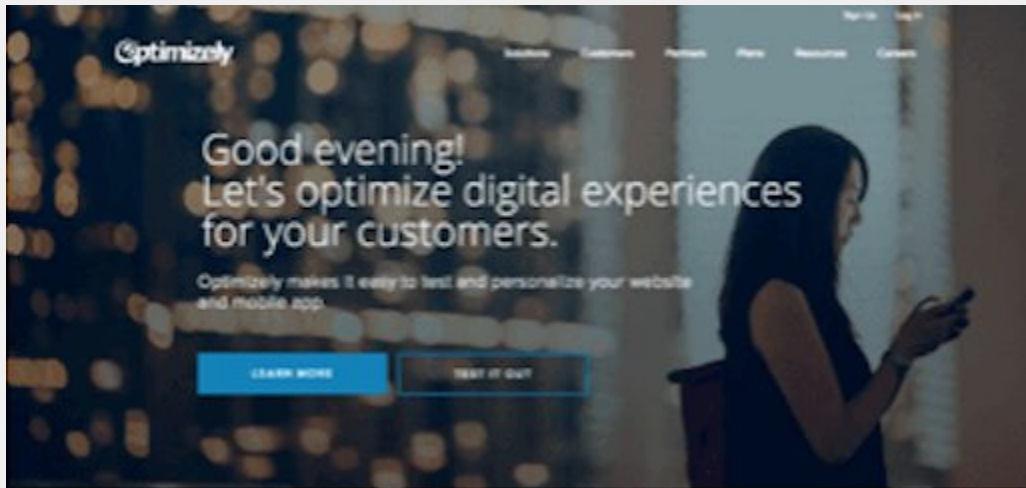
Optimizely: [Designing for Personalization: the Story of Optimizely's Homepage](#), March 23, 2016

Optimizely Homepage Before



Source: [Optimizely's blog](#)

Optimizely Homepage After



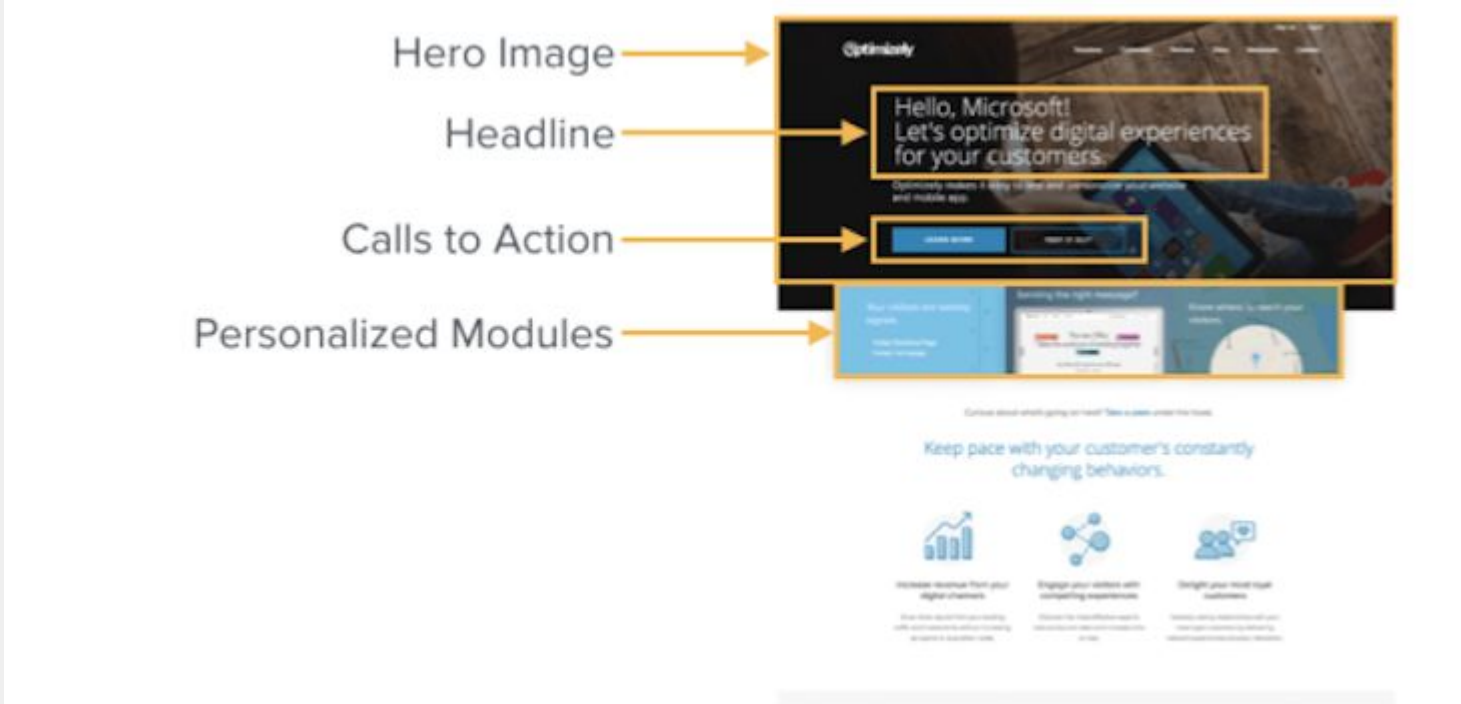
Source: [Optimizely's blog](#)

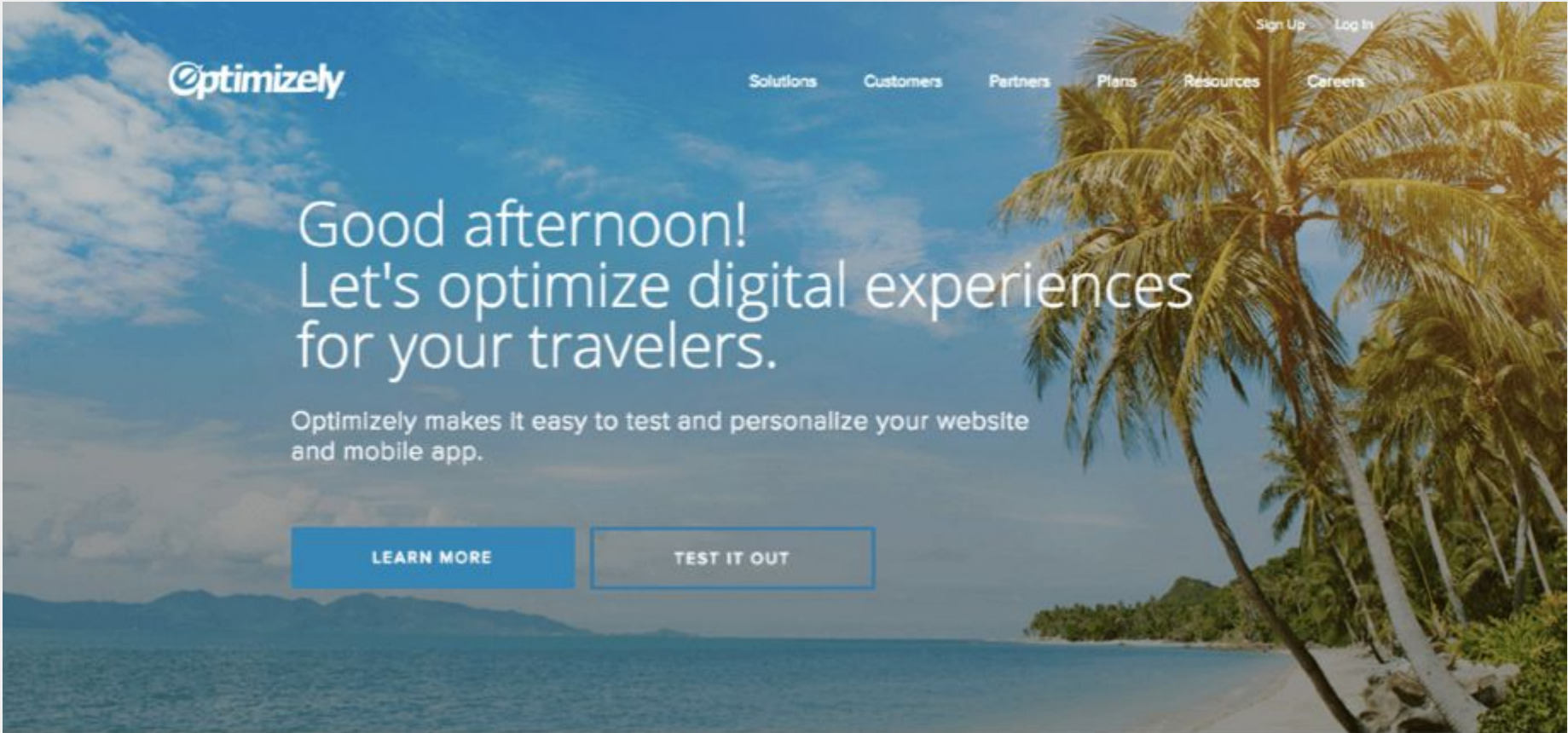
Optimizely: Why they personalized the homepage

“ Rather than treating all visitors to a single ‘average best’ experience when they come to Optimizely.com, we chose to make a deliberate departure and create a new design that could **support personalized messaging, creative, and CTAs for audiences** that we believe will drive the most impact for our business.

Optimizely: Audiences

- **Named accounts:** Current and prospective customers that are part of a target account list.
- **Industries:** Visitors from target verticals
- **Geography:** North America, Europe, Asia, etc.
- **Customers:** Visitors who are known Optimizely customers
- **Engaged visitors:** Return visitors who have engaged with one or more of Optimizely's digital properties in the past





Optimizely

Solutions Customers Partners Plans Resources Careers

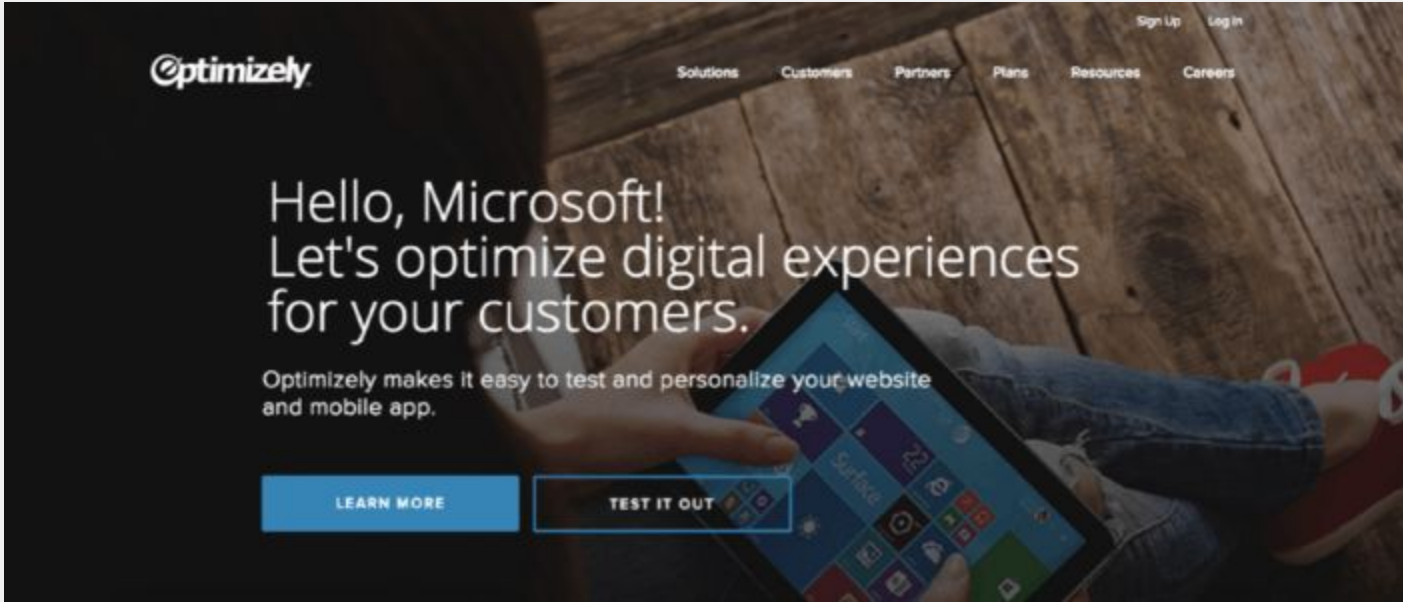
Sign Up Log In

Good afternoon! Let's optimize digital experiences for your travelers.

Optimizely makes it easy to test and personalize your website
and mobile app.

LEARN MORE TEST IT OUT

Source: [Optimizely's blog](#)



The image shows a screenshot of the Optimizely website. The background is a dark, high-angle photograph of a person's hands holding a tablet displaying a Windows 8-style interface. The Optimizely logo is in the top left. A navigation menu is at the top right. The main headline is 'Hello, Microsoft! Let's optimize digital experiences for your customers.' Below it is a sub-headline: 'Optimizely makes it easy to test and personalize your website and mobile app.' At the bottom are two buttons: 'LEARN MORE' and 'TEST IT OUT'.

Optimizely

Solutions Customers Partners Plans Resources Careers Sign Up Log In

Hello, Microsoft! Let's optimize digital experiences for your customers.

Optimizely makes it easy to test and personalize your website and mobile app.

LEARN MORE TEST IT OUT

Source: [Optimizely's blog](#)

The image shows a screenshot of the Optimizely website's landing page for Adidas. The background features a woman in athletic wear running on a cobblestone path. The Optimizely logo is in the top left. The navigation menu includes 'Solutions', 'Customers', 'Partners', 'Plans', 'Resources', and 'Careers'. 'Sign Up' and 'Log In' links are in the top right. The main headline reads 'Hello, Adidas! Let's optimize digital experiences for your athletes.' Below this is a sub-headline: 'Optimizely makes it easy to test and personalize your website and mobile app.' At the bottom, there are two buttons: a solid blue 'LEARN MORE' button and a blue-outlined 'TEST IT OUT' button.

Source: [Optimizely's blog](#)



Quantitative Impact

- 1.5% ↑ engagement
- 113% ↑ views of Solutions page
- 117% ↑ starts account-create process
- No effect down funnel on leads

A



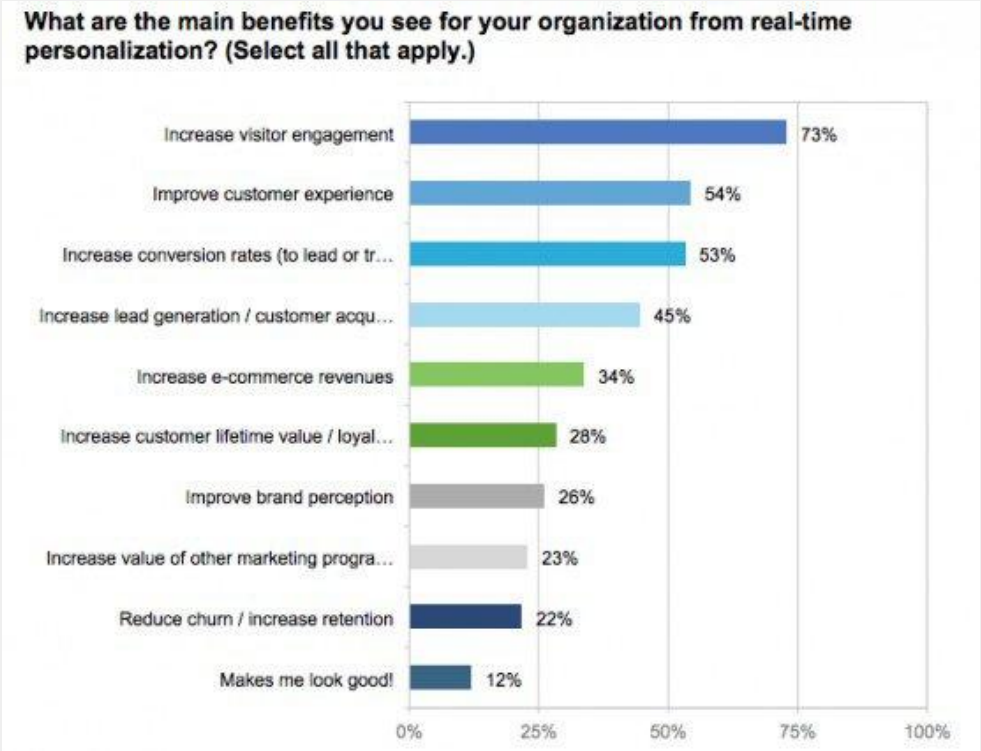
B



Personalization: Why use it?

- Improved visitor engagement
- Increased content stickiness
- Higher conversion rates

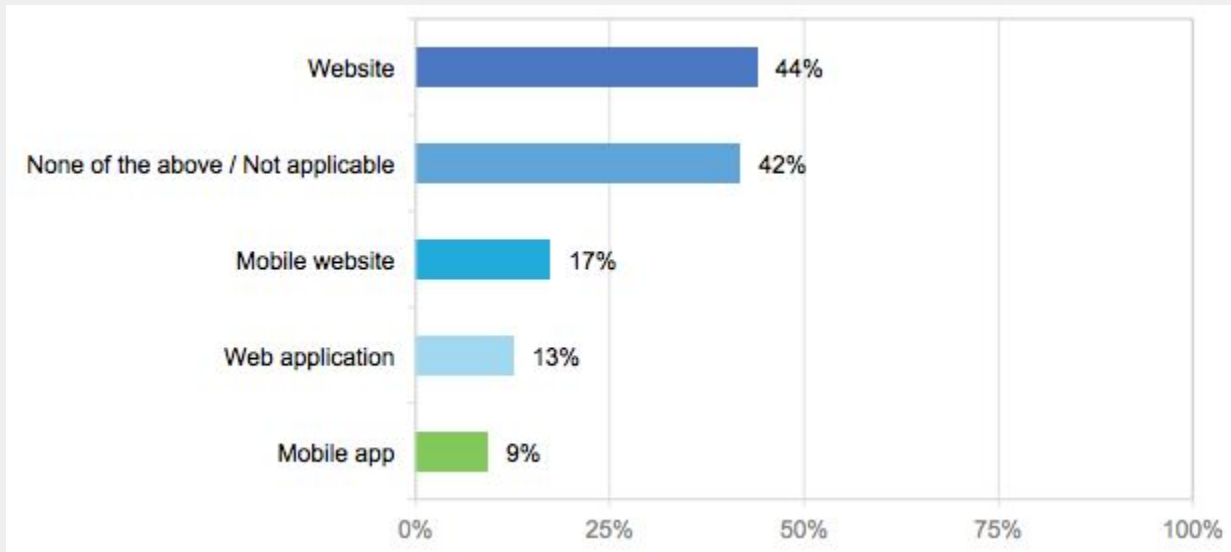
Benefits



Credit: [Evergage 2015 Survey](#)

Personalization: Where are people using it?

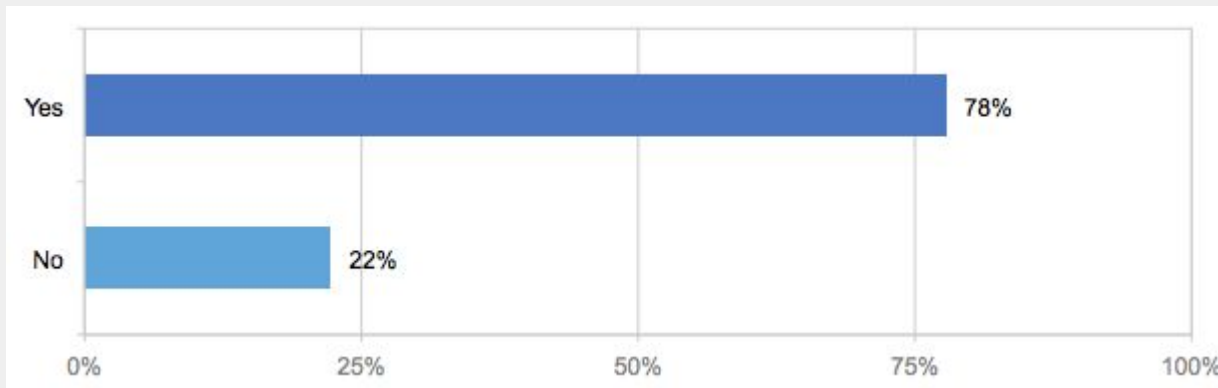
Are you using real-time (<1 second) personalization in any of the following channels? (Select all that apply.)



Credit: [Evergage 2015 Survey](#)

Personalization: Plan on using it?

If not, do you have plans to use real-time personalization within the next year?



Credit: [Evergage 2015 Survey](#)

Available Solutions

- Optimizely
- Evergage
- Hubspot
- Acquia Lift

2 Personalization Checklist



Checklist

- Adopt experimental and data-driven mindset
- Segment your audience
- Create user personas
- Develop content strategy
- Design and build platform to support content strategy
- Define measurements of success

Experimental and Data-Driven Mindset

- Develop a deeper understanding of your site traffic
 - <https://analyticsacademy.withgoogle.com/>
- Make decisions that are informed by data
- Develop a plan that defines experiment time periods that are measured
- Iterate on plan

Segment Your Audience

- Define and subdivide your site visitors into clearly identifiable groups having similar needs or wants.
- Use the following segmentation strategies
 - Demographic
 - Geographical differences
 - Behavioral
 - Psychographic

Create User/Buyer Personas

- User personas are semi-fictional representations of real site visitors through the buyer journey
- A general rule of thumb is to start with 3 personas
- Research your personas
- Sections of a persona
 - Background and demographics
 - Psychographics
 - Marketing specifics
 - Purchasing influencers

Develop Content Strategy

- General
 - Take inventory of current content that addresses user persona's concerns and questions at each point in buyer's journey
 - Identify gaps to respond to concerns and questions
 - Create content calendar and schedule content topic, format and author
 - Configure funnels that track users through to the completing of specific measurable goals
- Personalization
 - Plan for content variations and reuse

Design and Build Drupal Platform

- Create strategy and design for personalized pages
- Develop and implement solutions for content authoring of content variations
- Develop site architecture to support content variation rendering
- Consider technical requirements for both anonymous and authenticated user sessions

Define Measurements of Success

- Review current analytics
- Identify metrics and establish benchmarks
 - Page views
 - Content stickiness: pages per visit, time spent, bounce rate
 - Conversation rates
 - Abandonment rates
- Use timeboxing to set measurement periods
 - Relate these to personalization efforts
 - Consider seasonal or other marketing efforts influence

3 Marketing Automation



Marketing Automation

- What is it?
- Why use it?
- Available Solutions

Q

What is Marketing Automation?

A

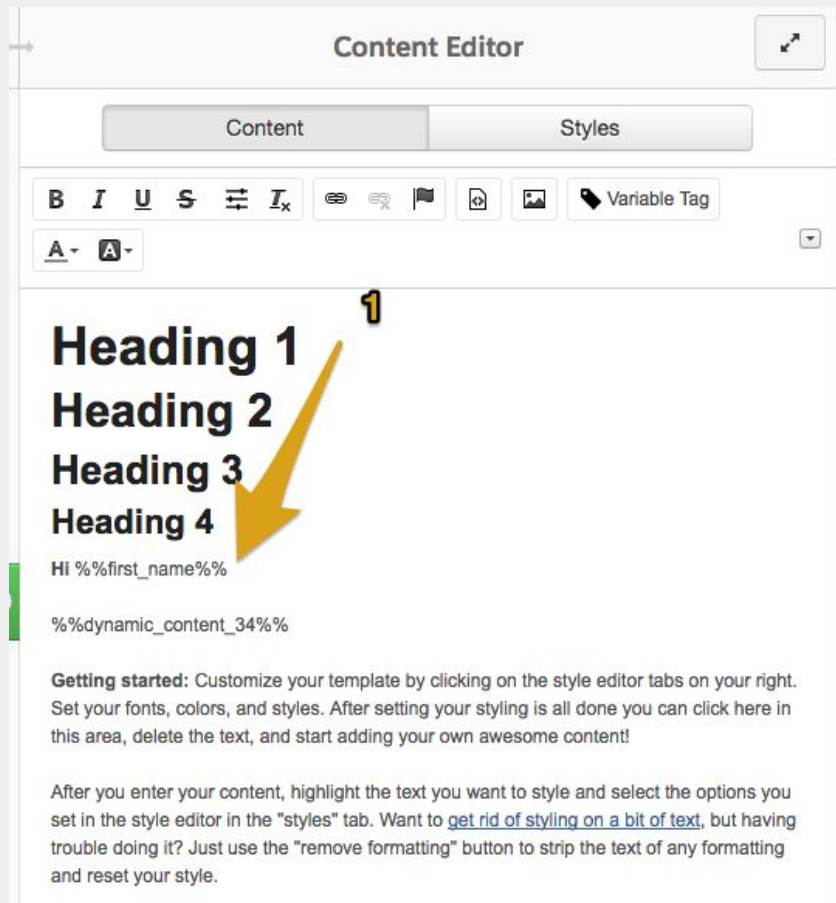
“Marketing automation software brings together content assets such as landing pages, emails, web events, etc. and delivers them to prospects at a time when it is most relevant to them in their buying cycle.”

Adam Waid

Director, Customer Success at Salesforce

What is it?

- Software platform that helps you to automate your marketing and sales engagement
- Originally focused on email marketing automation
- Now refers to a broad range of automation and analytic tools for marketing
 - Advanced email marketing
 - Lead nurturing
 - Lead scoring and grading
 - Prospect activity tracking
 - Forms and landing pages
 - Reporting



The screenshot shows the 'Content Editor' interface. At the top, there are two tabs: 'Content' (selected) and 'Styles'. Below the tabs is a toolbar with various icons for text formatting (bold, italic, underline, strikethrough, list, link, unlink, flag, image, video) and a 'Variable Tag' button. Below the toolbar are two color selection tools. The main content area contains a list of four headings: 'Heading 1', 'Heading 2', 'Heading 3', and 'Heading 4'. A yellow arrow points from the number '1' to 'Heading 1'. Below the headings are two lines of placeholder text: 'Hi %%first_name%%' and '%%dynamic_content_34%%'. Below the placeholder text is a paragraph of instructional text.

Content Editor

Content Styles

B I U S [List Icon] [Link Icon] [Unlink Icon] [Flag Icon] [Image Icon] [Video Icon] Variable Tag

A- **A-**

Heading 1

Heading 2

Heading 3

Heading 4

Hi %%first_name%%

%%dynamic_content_34%%

Getting started: Customize your template by clicking on the style editor tabs on your right. Set your fonts, colors, and styles. After setting your styling is all done you can click here in this area, delete the text, and start adding your own awesome content!

After you enter your content, highlight the text you want to style and select the options you set in the style editor in the "styles" tab. Want to [get rid of styling on a bit of text](#), but having trouble doing it? Just use the "remove formatting" button to strip the text of any formatting and reset your style.

Content Editor

Content Styles

B I U S Variable Tag

A -

Heading 1
Heading 2
Heading 3
Heading 4

Hi %%first_name%%

%%dynamic_content_34%% **2**

Getting started: Customize your template by clicking on the style editor tabs on your right. Set your fonts, colors, and styles. After setting your styling is all done you can click here in this area, delete the text, and start adding your own awesome content!

After you enter your content, highlight the text you want to style and select the options you set in the style editor in the "styles" tab. Want to [get rid of styling on a bit of text](#), but having trouble doing it? Just use the "remove formatting" button to strip the text of any formatting and reset your style.

Dynamic Content [X]

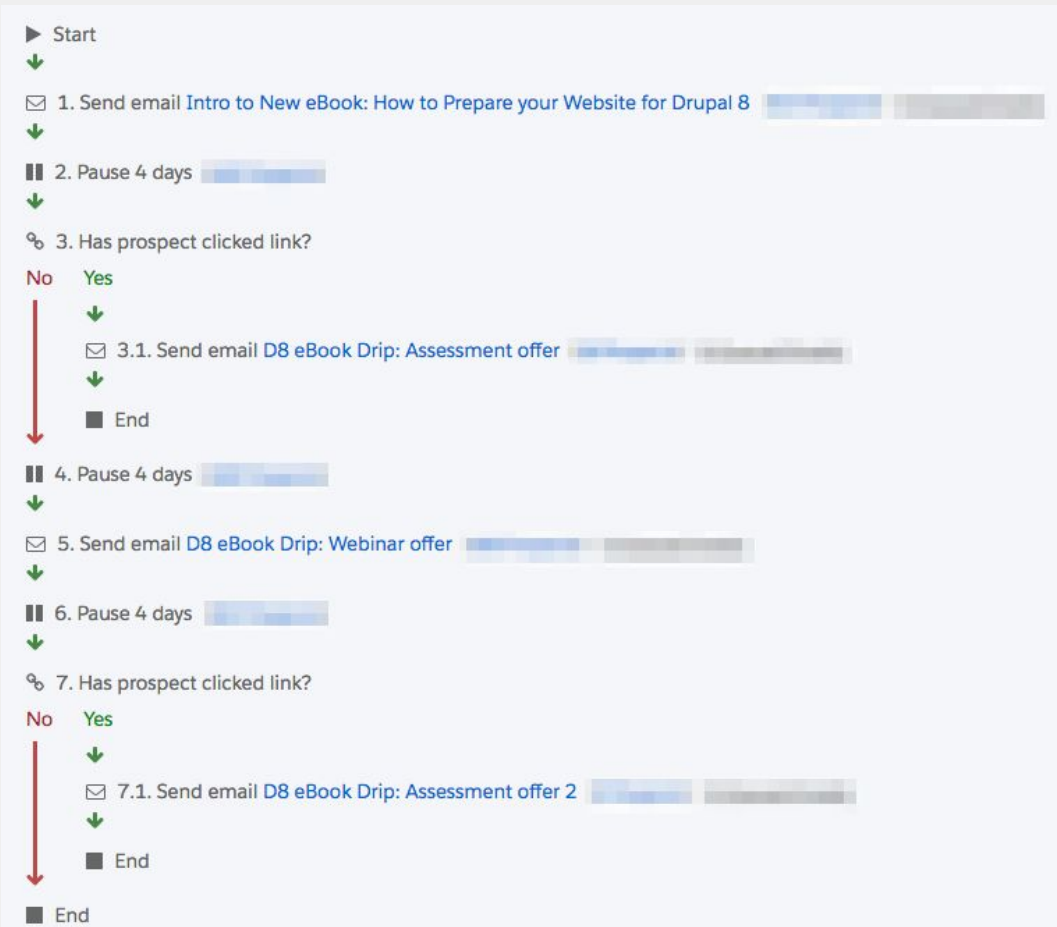
Vertical [v]

Preview

- ✓ Default Content
- Variation A: Custom Field: Vertical Is Media**
- Variation B: Custom Field: Vertical Is Higher Ed

...ibus. Gallia est
omnis divisa in partes tres, quarum.

Cancel OK



Lead Scoring

File Access	+3	Points will be assessed on each time a file is accessed
Form Error	-5	Points will be assessed once per form submission attempt (if a form is on a Pardot landing page, form error will be recorded on the landing page level)
Form Handler Error	-5	Points will be assessed once per form handler submission attempt
Form Handler Submission	+50	Points will be assessed once per form handler submission
Form Submission	+50	Points will be assessed once per successful form submission (if a form is on a Pardot landing page, successful submission will be recorded on the landing page level)
Landing Page Error	-5	Points will be assessed once per form submission attempt
Landing Page Success	+50	Points will be assessed once per successful landing page submission

Lead Grading: Creating Profiles

Name

Tags

Criteria

<input type="checkbox"/>	Criteria Name	<input type="text" value="Tech Industry"/>	with grade adjustment	<input type="text" value="1"/>
<input type="checkbox"/>	Criteria Name	<input type="text" value="Startup --Company Size"/>	with grade adjustment	<input type="text" value="2/3"/>
<input type="checkbox"/>	Criteria Name	<input type="text" value="Tech Hub -- Location"/>	with grade adjustment	<input type="text" value="1/3 letter"/>

Lead Grading with Automation Rule

Rules

Match type Match all Match any
Automation Rules are retroactive and affect all prospects that meet the selected criteria.

+ Prospect default field contains

and

+ Prospect account field is less than

and

+ Prospect default field contains

+ Add new rule + Add new rule group

Actions

+ Change prospect profile

Forms and Landing Pages

- Forms to embed via iframe in Drupal or with a landing page
 - Progressive profiling
 - Completion actions: redirects, auto-responder, etc.
 - Using for gated content
- Form handlers to receive form data via post
- Landing pages to use with emails outside of Drupal
- Multivariate test landing pages

Prospect activity tracking

Edit User Preferences

Send daily prospect activity emails (for my prospects)

Exclude prospects with tags:

add a tag

Send daily prospect activity emails (for all prospects)

Send an email when a prospect is assigned

Send daily prospect assignment emails

Send daily visitor activity emails

Send starred prospect activity alerts

Send weekly search marketing email (sent on Mondays)

Save user preferences

Cancel

Why use it?

- Taking repetitive tasks out of marketers hands, allowing focus on new/more exciting projects
- Better targeting of customers and prospects
- Improving the customer experience
- Better email marketing
- Reduction of human error in campaigns
- Lead management
- Multichannel marketing

"80% of marketing automation users saw their number of leads increase, and 77% saw the number of conversions increase."

VB Insight, 2015

4 With Drupal



Marketing Automation: What's available in Drupal 7?



Marketing Automation: What's available in Drupal 7?

- All have page tracking and webform integration
- Marketo includes user integration and field fetch
- Pardot includes path-based individual campaigns and lead scoring
- Silverpop allows you to create custom event tracking



Page Tracking

Pardot account id

The value show in the pardot demo script for piAId. eg. if the script has piAId = "1001"; this field should be 1001

Default Pardot campaign id

The value show in the pardot demo script for piCId. eg. if the script has piCId = "1001"; this field should be 1001

Tracking scope

Pages

Roles

Add tracking to specific pages

- Every page except the listed pages
- The listed pages only

```
admin
admin/*
batch
node/add*
node/*/*
user/*/*
```

Webform Integration

Drupal navigation bar: Home, Content, Structure, Appearance, People, Modules, Configuration, Reports, Help. Hello root, Log out.

Secondary navigation: Add content, Find content, Edit shortcuts.

Breadcrumbs: Home » Pardot Webform

Pardot Webform

VIEW EDIT **WEBFORM** RESULTS DEVEL

Form components Conditionals Eloqua **Pardot** Silverpop E-mails Salesforce Form settings HubSpot

GENERAL

Is active

Post url

Visit your "Form Handlers" page in Pardot. Click on a form link and then copy the "Endpoint URL" value here.

NAME	TYPE	PARDOT KEY
First Name	textfield	<input type="text" value="first_name"/>
Email	textfield	<input type="text" value="email"/>

Save Reset

Marketo's User Integration

API Configuration

Field Definition

Page Visibility

Role Visibility

User Integration

Webform Integration

Trigger a lead update on the following events:

- User login
- User registration / creation
- User update


USER FIELD MAPPING

When a lead update is triggered, the fields mapped below will be included in the data sent to Marketo. Select the associated Marketo field for each User field displayed.

DRUPAL	MARKETO
First (field_first)	First Name (FirstName) ↓
Last (field_last)	Last Name (LastName) ↓

Pardot Campaigns

Home » Administration » Configuration » Web services » Pardot

Pardot 

SETTINGS

CAMPAIGNS

SCORING

PARDOT ENABLED WEBFORMS

CAMPAIGN ID	NAME	PATH	OPERATIONS
1234	Seasonal	seasonal-landing	Edit Delete

Campaign ID

Numeric campaign code(piCId) from tracking code preview in Pardot administration interface.

Campaign name

A short descriptive name for administration purposes. Can be the same as the campaign name in Pardot but not required.

Add new path

Enter one page per line as Drupal paths. The '*' character is a wildcard. Example paths are blog for the blog page and blog/* for every personal blog. <front> is the front page.

Pardot Scoring

Home » Administration » Configuration » Web services » Pardot

Pardot

SETTINGS CAMPAIGNS **SCORING** PARDOT ENABLED WEBFORMS

PATH	SCORE	OPERATIONS
buyers-guide	10	Edit Delete
product-comparison	5	Edit Delete
Add new path <input type="text"/>	Score <input type="text"/>	<input type="button" value="Add"/>

Silverpop Custom Event Tracking

▼ SILVERPOP EVENT TRACKING

CUSTOM EVENT TYPE	CUSTOM EVENT NAME	CSS SELECTOR		
call-to-action	Call to Action	#call-to-action	Edit	Delete

- [Add New](#)

▶ SILVERPOP API CONFIGURATION

Web Personalization: What's available in Drupal 7?

- Personalization
 - <https://www.drupal.org/project/personalization>
 - Created by Dan.Ashdown
- Acquia Lift: https://www.drupal.org/project/acquia_lift
 - Personalize: <https://www.drupal.org/project/personalize>
 - Visitor Actions: https://www.drupal.org/project/visitor_actions

Hide descriptions

PEOPLE

- ▶ [Account settings](#)
Configure default behavior of users, including registration requirements, e-mails, fields, and user pictures.
- ▶ [Secure login](#)
Configure secure login settings.
- ▶ [IP address blocking](#)
Manage blocked IP addresses.

CONTENT AUTHORIZING

- ▶ [Text formats](#)
Configure how content input by users is filtered, including allowed HTML tags. Also allows enabling of module-provided filters.
- ▶ [UUID Features Integration](#)
Configure the settings for UUID Features Integration.
- ▶ [Webform settings](#)
Global configuration of webform functionality.

SYSTEM

- ▶ [Site information](#)
Change site name, e-mail address, slogan, default front page, and number of posts per page, error pages.
- ▶ [Actions](#)
Manage the actions defined for your site.
- ▶ [Site personalization](#)
Configure the site wide configuration settings.
- ▶ [Universally unique identifiers](#)
Configure universally unique identifiers.
- ▶ [Cron](#)
Manage automatic site maintenance tasks.

USER INTERFACE

- ▶ [Shortcuts](#)
Add and modify shortcut sets.

Personalization

TAXONOMY BASED PERSONALIZATION

Which vocabularies should be used?

- Vertical
- Interests
- Constituent Life Cycle
- Persona

Select the vocabularies that should be used for site personalization.

Weight to be applied to each vocabulary.

Vertical

Interests

Constituent Life Cycle

Persona

The weighting sets the importance of each vocabulary when selecting content for the user. For example if the node Categories is twice as important as Tags give Categories twice the weight.

Personalization

ADD NEW SEARCH KEYWORD MAPPING

Search keyword *

Taxonomy term *

Add mapping

KEYWORD	TERM	
Demo	Prospect	delete
security update	Support	delete
University	Higher Education	delete

Personalization

- Geolocation based personalization
 - Implicit - based on users IP address (uses Telize GeoIP service)
 - Explicit - If the location isn't ascertained from the IP the HTML5 location API is used
- Taxonomy based personalization
 - Implicit - Accessing content tagged with certain vocabularies
- Search based personalization
 - Implicit - Search keywords from Google, Bing and Drupal search are matched to taxonomy terms
- You can extend the module by setting your own scoring mechanisms programmatically

Adds highly configurable **implicit** and **explicit** personalization to Drupal websites based on geolocation and taxonomies.

Ascertained from their physical location and behaviour on your site, which builds up a personalization profile of them.

Acquia Lift



Acquia Lift

Add page action

nexus GUIDES

Title *
GET CULTURED. TOUR LONDON. link action

Machine name: get_cultured_tour_london_link_ac [Edit](#)

The administrative title of this action.

Event
clicks

— ADVANCED OPTIONS —

Save Cancel

GET CULTURED. TOUR LONDON.

Acquia Lift

The screenshot displays the Acquia Lift user interface. At the top is a dark navigation bar with icons and labels for Home, Menu, Shortcuts, Personalize, and Admin. Below this is a left-hand navigation menu with the following items: Results for Trip Sales Optimizer, Campaigns, Preview Registration Form Test, **Preview Trip Sales Optimizer**, New campaign, Previews, Trips Optimization, **Preview Option A**, Preview Option B, and Preview Option C. The main content area on the right features a large banner for 'TRIPS' with a background image of Big Ben and the Houses of Parliament. The banner text reads 'TRAVEL TO LONDON FOR LESS'. Below the banner is a smaller promotional image with the text 'Win a FREE trip to London'.

How about Drupal 8?

- Marketing Automation
 - Eloqua dev version
 - Pardot is in progress
- Personalization
 - Acquia Lift has a 8.x-1.0-alpha6 version available; does not yet natively support the following features: <https://docs.acquia.com/lift/drupal>
 - Website personalizations
 - Tracking visitor actions (such as clicks)
 - Mapping of contexts to user-defined fields

Pardot Drupal 8

Configure Pardot

[Settings](#)[Campaigns](#)[Scores](#)[Contact Form Mappings](#)

[Home](#) » [Administration](#) » [Configuration](#) » [Web services](#)

[+ Add a Pardot Campaign](#)[+ Add a Pardot Score](#)[+ Add a Pardot Contact Form Mapping](#)

▼ GENERAL SETTINGS

General settings applicable to all Pardot functionality.

Pardot Account ID *

The value shown in the Pardot demo script for piAId. eg. if the script has piAId = "1001"; this field should be 1001.

Pardot API username

E-mail address used to login to Pardot.

Pardot API password

Password used to login to Pardot.

Pardot API user key

API User Key found on your [Pardot settings screen](#).

Default Pardot Campaign ID *

The value shown in the Pardot demo script for piCId. eg. if the script has piCId = "1001"; this field should be 1001.

Pardot Drupal 8: Tracking Scope

Tracking scope

Configuration to include/exclude the Pardot tracking code. The tracking code, with default Campaign ID, is added to override the default campaign on specific paths included within this configuration.

Pages

Roles

Pages

admin
admin/*

Specify pages by using their paths. Enter one path per line. Use `/user/*` for every user page. `<front>` is the front page.

- Show for the listed pages
 Hide for the listed pages

Pardot Drupal 8: Campaigns

Pardot Campaigns

[Settings](#)[Campaigns](#)

[Home](#) » [Administration](#) » [Configuration](#) » [Web services](#) » [Configure Pardot](#)

[+ Add a Pardot Campaign](#)

Additional Pardot Campaigns for specific paths, on which, the default campaign will be overridden.

CAMPAIGN LABEL	PARDOT CAMPAIGN ID	OPERATIONS
Front Page Campaign	1788	Edit ▼
User Campaign	1790	Edit ▼

Pardot Drupal 8: Scoring

Pardot Scores

- Settings
- Campaigns
- Scores**
- Contact Form Mappings

Home » Administration » Configuration » Web services » Configure Pardot

[+ Add a Pardot Score](#)

Pardot Scores for specific paths.

SCORE LABEL	PARDOT SCORE VALUE	OPERATIONS
Custom landing page	15	Edit

Pardot Drupal 8 Contact Forms

Edit Pardot Contact Form Mapping

[Home](#) » [Administration](#) » [Configuration](#) » [Web services](#) » [Configure Pardot](#) » [Pardot Contact Form Mappings](#)

Label *



Machine name: website_contact

Is active

Post url

Visit your "Form Handlers" page in Pardot. Click on a form link and then copy the "Endpoint URL" value here.

Contact Form *

Add Pardot External Field Names to map contact form elements.

FIELD LABEL	FIELD NAME	PARDOT EXTERNAL FIELD NAME
The sender's email	mail	<input type="text" value="email"/>
First Name	field_first_name	<input type="text" value="first_name"/>
Last Name	field_last_name	<input type="text" value="last_name"/>

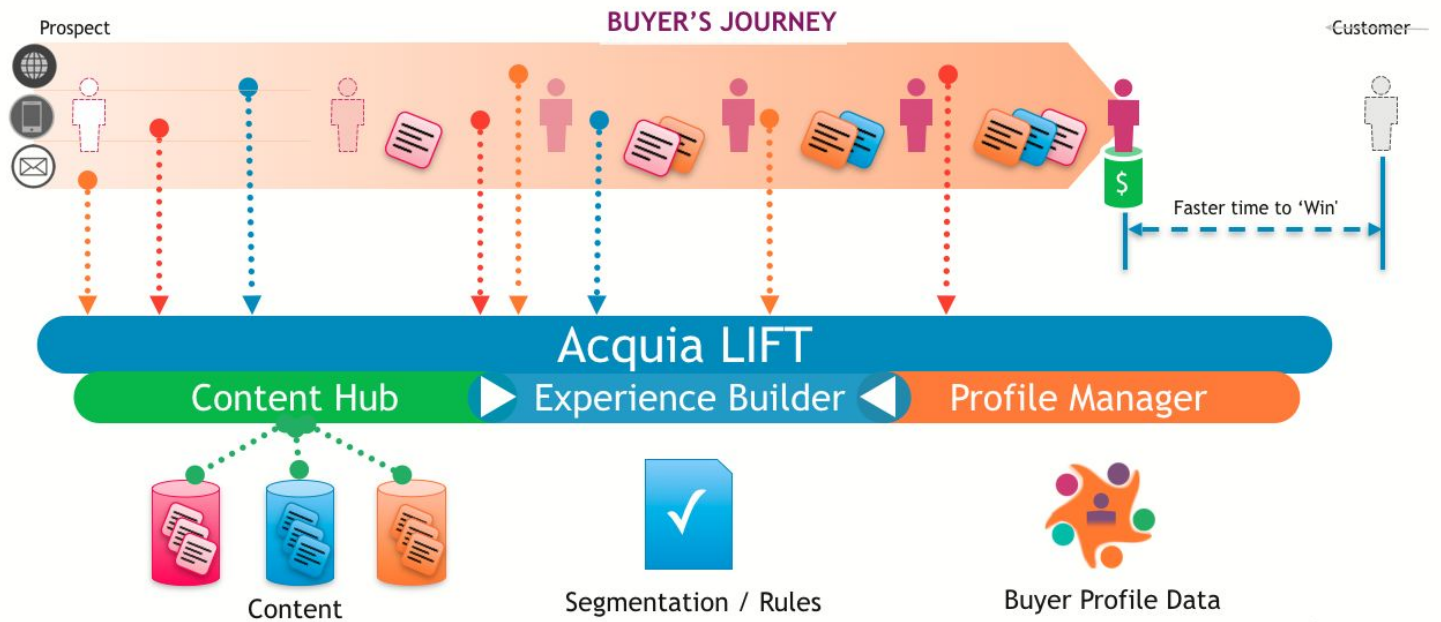
[Update Pardot Contact Form Mapping](#)

[Delete](#)

Pardot Drupal 8 Roadmap

- Contact form integration
- Pardot form field type
- Pardot form block class
- Personalization

Acquia Approach to Personalization



3

Acquia Lift (“Lift 3”) is a solution that **unifies content and customer data** from multiple sources to deliver in-context, personalized experiences across multiple channels and devices.

Acquia Lift 3 Features

- New drag-and-drop UI for content targeting
- Unified customer profile
- Merging anonymous and known visitor profiles
- Unified content
- Content syndication
- Real time, adaptive segmentation
- Behavioral targeting and A/B testing

Q & A

Thank you!



@Mediacurrent



slideshare.net/JasonWant1



Mediacurrent.com