

Sitecore Context Marketing

Course Syllabus

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Sitecore Context Marketing by TechGuilds

Overview

TechGuilds is a professional services firm focused on providing implementation and mentoring services to Sitecore clients and partners. This document outlines the Sitecore Context Marketing training course designed to equip your team with the essential skills they will need to make your Sitecore XP project or practice a success.

For each course TechGuilds provides

- Course Manuals
- Instructor(s)
- Preconfigured Lab Environments (where applicable)
- Certificate of Completion (or Certification where applicable)

Trainee Requirements

- Windows 8+ PC/Laptop, 8 GB Ram
- Google Chrome 5 + or Internet Explorer 10 +
- Sitecore XP License

Client On-Site Training Facility Requirements

- Internet connection
- Meeting room with projector¹

Target Audience

- Content Managers
- Marketers
- Project Managers
- Business Analysts
- Sitecore project Stakeholders

Prerequisite Competencies

- Recommended: Familiarity with web content management and HTML

¹ If you are unable to provide a projector, please let us know well ahead of the course date(s) so we can arrange one for the duration of the course.

Module 1 - Sitecore XP Advanced Content Authoring

Overview

The TechGuilds' Sitecore XP Advanced Content Authoring module is designed to provide Content Managers with the skills they'll need to manage websites using Sitecore XP.

At the end of this course participants will have a solid understanding of Sitecore XP 8 from a content management perspective enabling them to be able to quickly, confidently and productively get the most out of Sitecore. Participants will create, edit and publish content; understand the importance of workflow(s); learn how to recover deleted content and work with Sitecore security to secure website pages and sections.

Module Length: 1 Day

This full-day module can be run from 9 a.m. to 5 p.m. or delivered in "segments" over a desired time period.

Module Details

Segment	Description	Duration
Sitecore Overview	<ul style="list-style-type: none">The Sitecore Content and Experience editors.Searching for items.The Media library.	45 minutes
Break		10 minutes
Creating Content	<ul style="list-style-type: none">Content editing deep dive.Content and Pages.Use the Experience Editor and proofing tools.Accessibility compliance.	2 hours
	Content Lab	30 minutes
Lunch Break		1 hour
Securing Content	<ul style="list-style-type: none">Understanding and managing Roles, Users, Subscribers and Inheritance.Roles within roles and predefined roles.Using Access Viewer to validate and troubleshoot.	1 hour
	Security Lab	30 minutes
Break		15 minutes
Sitecore Workflow	<ul style="list-style-type: none">Understanding the importance of Workflow from a business and Content Author's perspective.The Sample Workflow.Creating and editing workflows and using the Workbox.Securing a workflow state for certain users.	1 hour
Publishing Caveats	<ul style="list-style-type: none">Un-publishing content.Restricting publishing.Auto-publishing.Previewing an item.	30 minutes
	Publishing & Workflow Lab	30 minutes

Module 2 - Sitecore XP Context Marketing

Overview

The TechGuilds' Sitecore XP Context Marketing module is designed to help attendees leverage the Sitecore XP platform for better customer engagement. We'll also demonstrate how to "dig out" the analytics required to measure campaign success.

Participants who complete this course will learn the requisite skills to be able to create an end-to-end marketing campaign that displays personalized content automatically. Participants will create a lead generation form; edit an engagement plan for automation; create a persona; tag content with values; conduct A/B testing and view analytics reports.

Module Length: 1 Day

This full-day module can be run from 9 a.m. to 5 p.m. or delivered in "segments" over a desired time period.

Module Details

Segment	Description	Duration
Personas and Profiles	<ul style="list-style-type: none">• How personas fit within the Sitecore context.• What makes up a persona and how to create them and see how personas interact with Experience Marketing features.	45 minutes
Personalization and A/B Testing	<ul style="list-style-type: none">• Adding personalization rules to content and testing personalization results.• Learn how to conduct an A/B test.	1 hour
Break		10 minutes
EXM & Campaigns	<ul style="list-style-type: none">• Introduction to Sitecore's Email Experience Manager (EXM) and Sitecore campaigns.	2 hours
Lunch Break		1 hour
Analytics and Reporting	<ul style="list-style-type: none">• Tracking PDF downloads.• Out-of-the-box analytics vs Google Analytics.• The Federated Experience Manager.	1 hour
WFFM	<ul style="list-style-type: none">• Web Forms for Marketers.• Creating forms and campaign flows.	1.5 hours
Break		15 minutes
Engagement Plans	<ul style="list-style-type: none">• States – the status of a website contact, such as whether or not they have visited certain pages, achieved specific goals, performed specific actions, where they have come from, and so on.• Conditions – logic-based statements that you set which determine whether contacts in a specific state fulfill certain criteria. Conditions can relate to the contact in general or this particular visit.• Rules – criteria that you define which determine whether a contact fulfills a condition.• Triggers – events that determine when Sitecore should evaluate the conditions and rules associated with a state. There are two types of triggers: contact and timeout triggers.	1 hour
