



**Preventing accidents with the help of
Marketing Automation and EXM**

suva

Agenda

- the project
- the solution (Demo)
- the way (with Sitecore)
- the learnings



Preventing accidents with the help of Marketing Automation and EXM

My Prevention Program
Christoph Brunner & Andreas Baumgartner, Baden, 29.4.2019

suva

Law



<http://positivelivingmagazine.com.au/sites/default/files/law2.jpg>

Safety Officer



Prevention program with seasonal tips (MVP)

Forst

Programm starten

Meine Aktivitäten

Mai 2019 

- [Persönliche Schutzausrüstung \(PSA\) →](#)
- [Zecken →](#)

Juli 2019 

- [Alleinarbeit →](#)
- [Richtig heben und tragen →](#)

September 2019 

- [Erste Hilfe →](#)

Prepared tips and instructions

Sensibilisieren Sie Ihre Mitarbeitenden zum Thema «Zecken»

So gehen Sie vor:

1. Bestellen Sie das Kleinplakat «Die Zecke – der Vampir vom Waldrand» und hängen Sie es gut sichtbar auf.
2. Senden Sie den Flyer «Vorsicht, Zecken! So können Sie sich schützen» an Ihre Mitarbeitenden.

[Zum kostenlosen Bestellmaterial >](#)

Weiterführende Informationen zum Thema finden Sie auf der [Website vom Bundesamt für Gesundheit](#) ↗

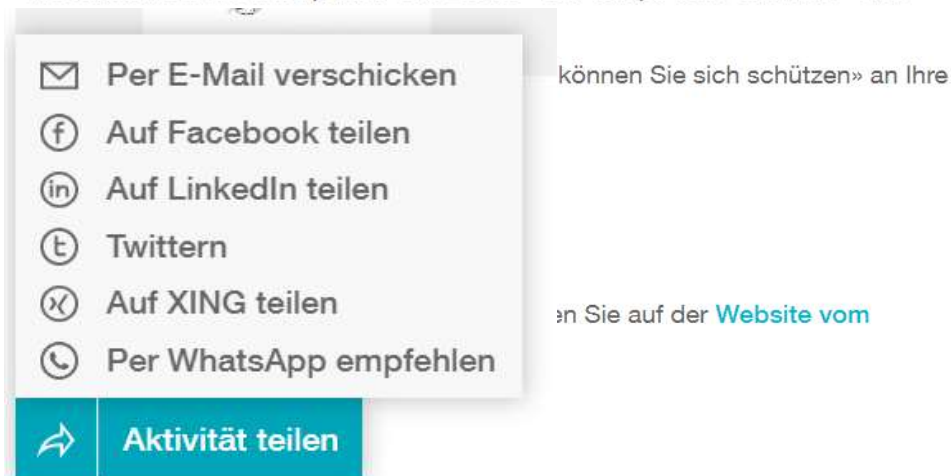
[↗](#) **Aktivität teilen**

Last Mile

Sensibilisieren Sie Ihre Mitarbeitenden zum Thema «Zecken»

So gehen Sie vor:

1. Bestellen Sie das Kleinplakat «Die Zecke – der Vampir vom Waldrand» und



Potential



<https://pbs.twimg.com/media/DZEqYWmVQAAN8qG.jpg>

Vision



<https://www.kidcode.es/wp-content/uploads/Minority-Report.jpg>

Demo

DEMO





Newsletter?



Email
Experience
Manager



Content!



Content Editor



Email
Experience
Manager



Newsletter!



Content Editor



Email
Experience
Manager



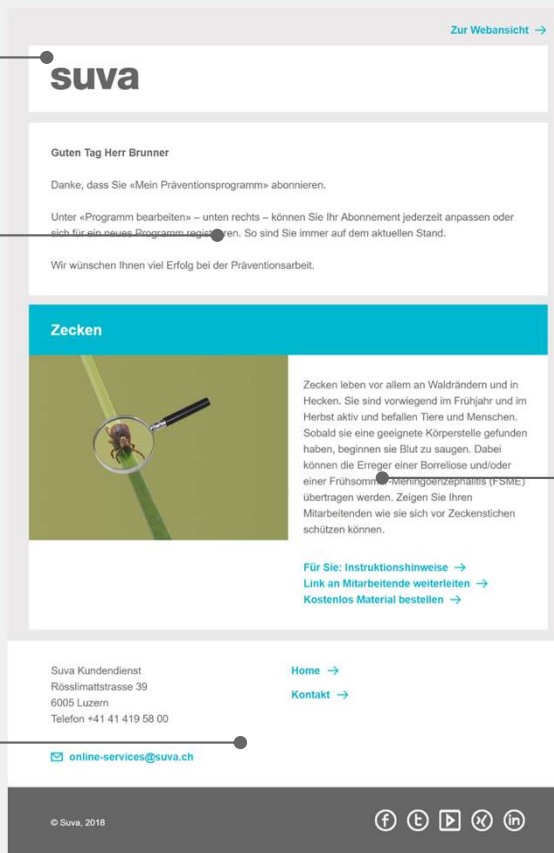


Newsletter – Renderings

Header

Intro

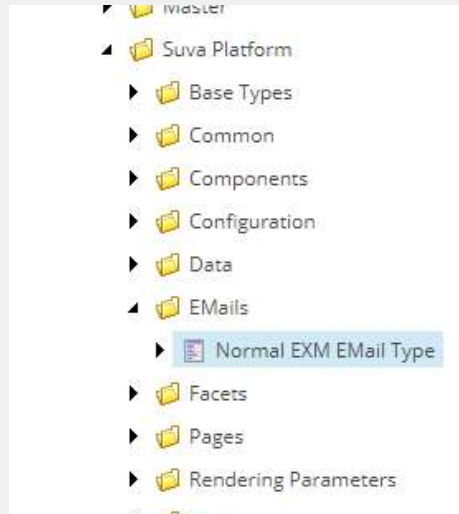
Footer



Content 1-n actions



Newsletter – Page (eMail) template



Data

Base template [shared]: [\[Go to field\]](#) | [\[Reset Field\]](#)

All Selected

Normal Page Type

Name	Type	Source	Unversioned	Sh...
Mail				
Subject	Single-Line Text			
Add a new	Single-Line Text			
Add a new section				



Newsletter – Email campaign

Create email campaign



Regular email campaign

Create a regular email campaign to be sent to a list of recipients.



Automated email campaign

Create an automated email campaign to be triggered by an automation plan, subscription event or goal.



Create List

Automated email campaign



Import



HTML file

Templates



Sample Newsletter



Two-column message



One-column message



Simple HTML message



Plain text message



Existing page

Name:

IDA Mail

Existing page:

/sitecore/content/suva_ch/Home/System Pages/IDA/Pre ...

Create

Cancel



Newsletter – Personalize



Content Editor



Email
Experience
Manager



Experience
Profile



Newsletter – Personalize

```
IdaMailInfo idaMailInfo =  
    contact.GetFacet<IdaMailInfo>(IdaMailInfo.DefaultFacetKey);  
  
IList<GuidIdContainer> actionsItemId = idaMailInfo.IdaItemIds;
```

Zecken

```
PersonalInformation personalInfoFacet =  
    contact.GetFacet<PersonalInformation>(PersonalInformation.DefaultFacetKey);  
  
string gender = pe  
string lastName =
```



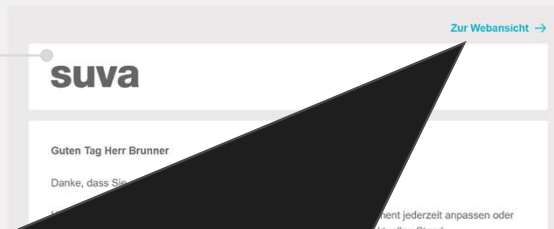
[Sitecore.com - Create a custom facet](http://bit.ly/2vqlhl4)
<http://bit.ly/2vqlhl4>



Newsletter – Web preview

Header

Intro



```
string ids = Request.QueryString[actionIdParamName];  
if (!string.IsNullOrEmpty(ids))  
{  
    return ids.Split('|');  
}  
  
return IdaxConnectService.GetNextMailIdaItemIds(contact)  
    .Select(x => x.ToString());
```

Foot

```

HtmlContentViewModel vm =
foreach (string idAsString)
{
    if (Guid.TryParse(idAsString, out Guid id))
    {
        sb.AppendLine(GetHtmlFromRendering(id, dataSource));
    }
    else
    {
        Log.InfoFormat("'{0}' is not a valid GUID.", idAsString);
    }
}

vm.HtmlBody = sb.ToString();
return View("html-content")

```

```

private string GetHtmlFromRendering(string dataSource)
{
    var writer = new StringWriter();

    var rendering = new Rendering
    {
        RenderingItemPath = _IDAMailItemRenderingId,
        DataSource = dataSource
    };

    rendering["Parameters"] = string.Empty;

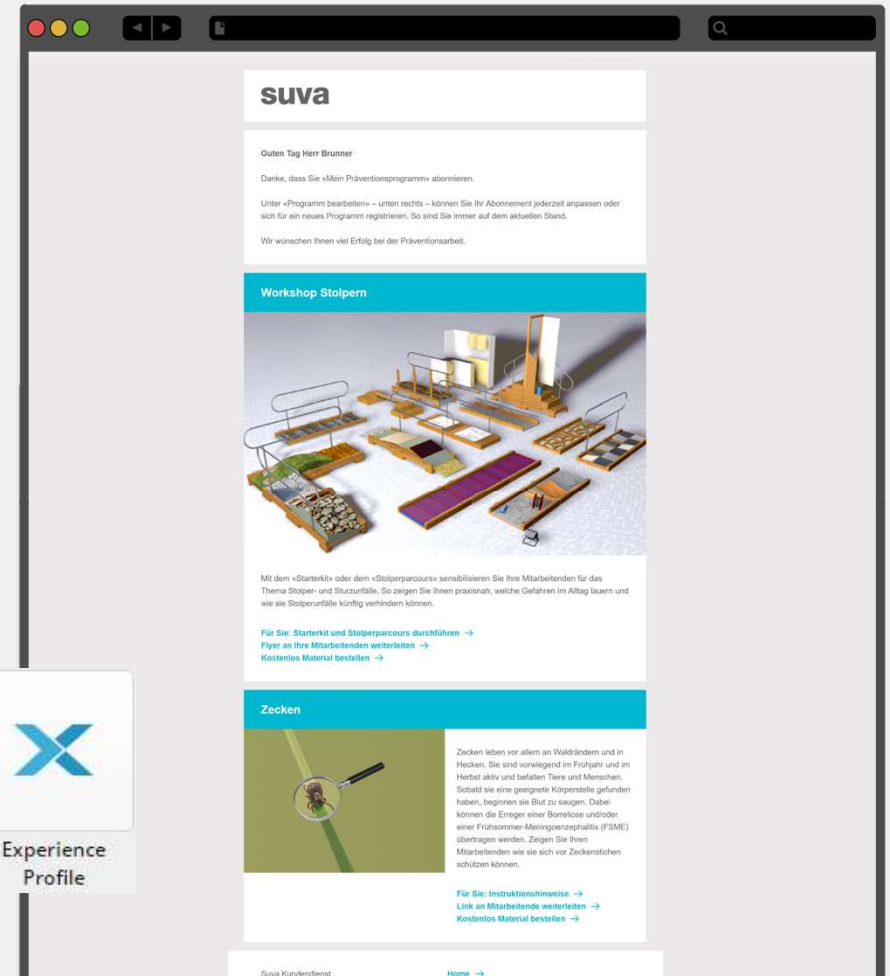
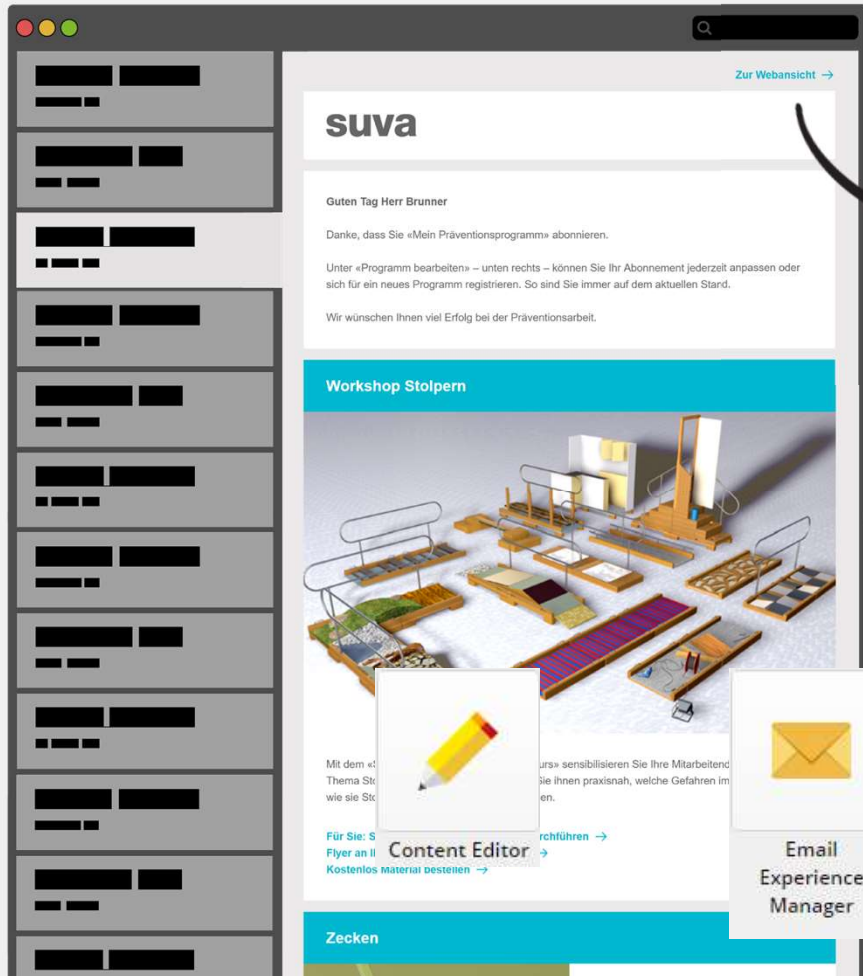
    var args = new RenderRenderingArgs(rendering, writer);
    Sitecore.Mvc.Pipelines.PipelineService.Get()
        .RunPipeline("mvc.renderRendering", args);

    return writer.ToString();
}

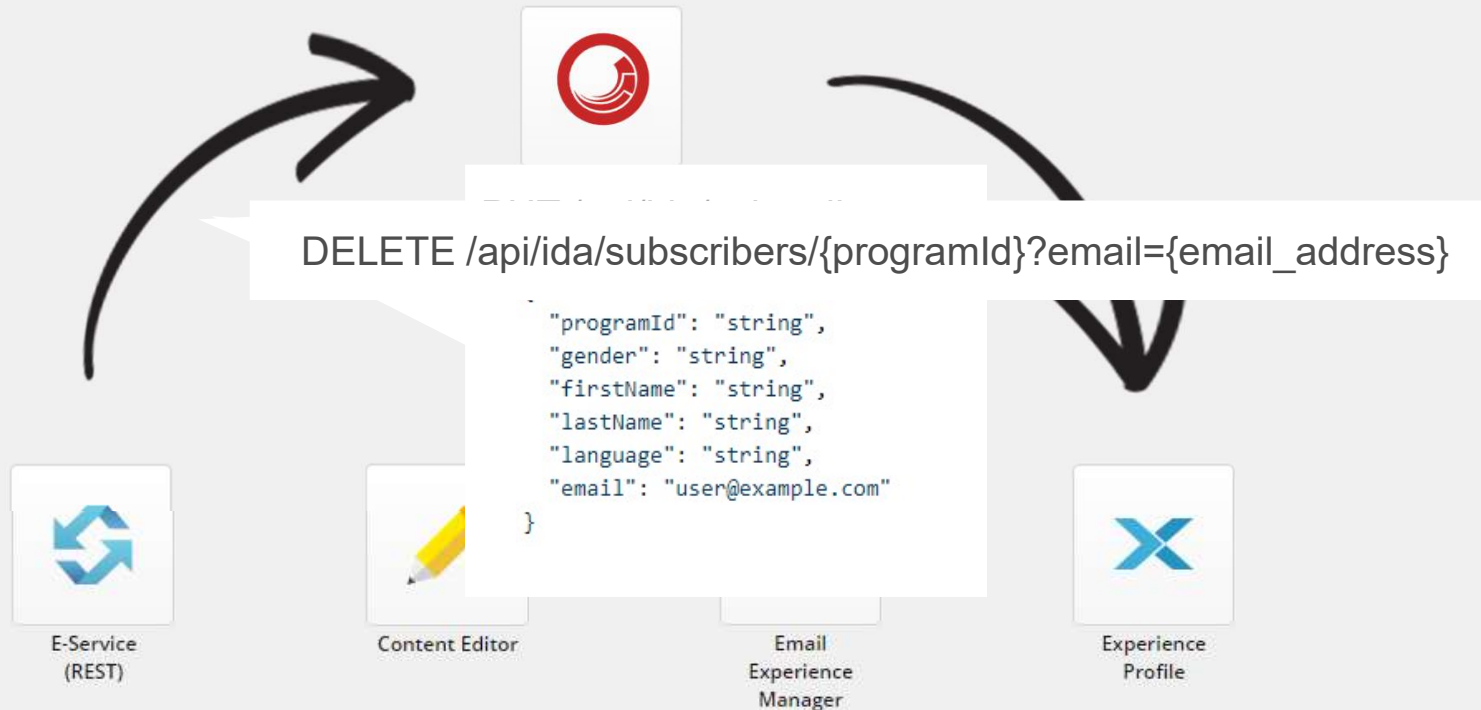
```



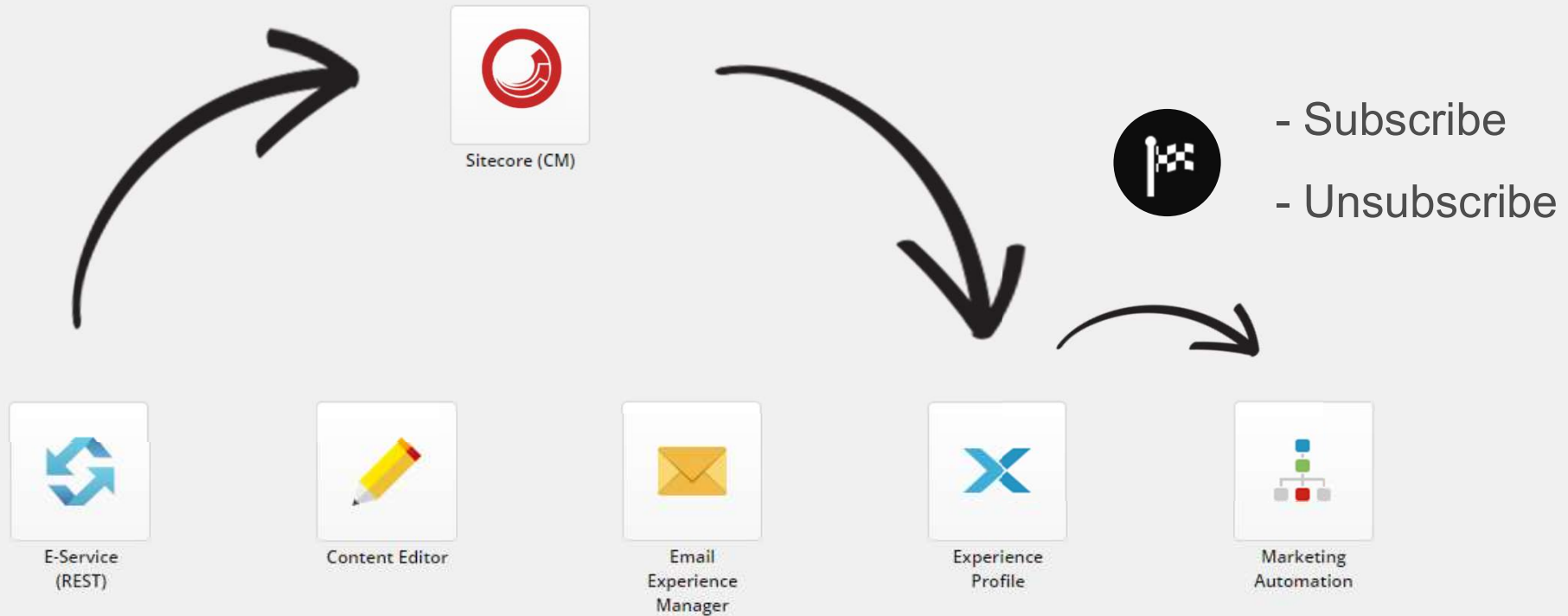
Newsletter



Connect with business logic (E-Service)

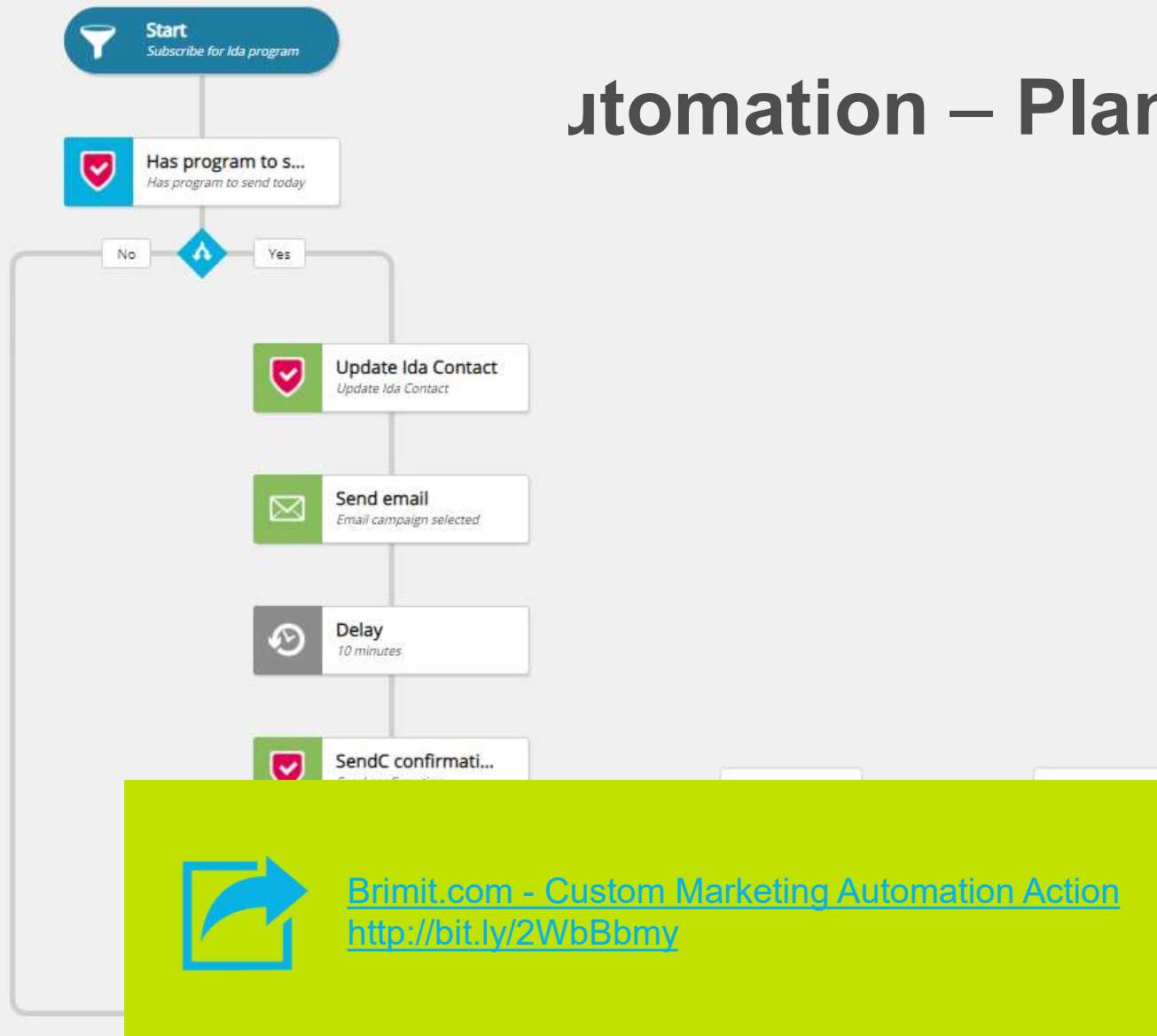


Connect with business logic (E-Service)

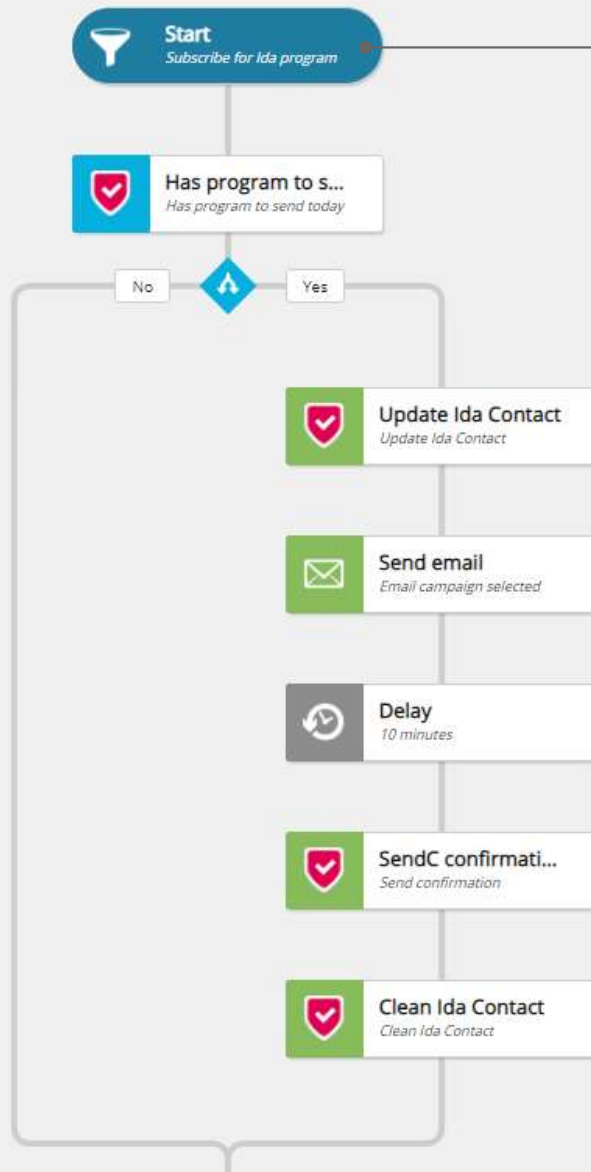




Automation – Plan



E-Service
(REST)



Enroll contact

Enroll contact when they:

- ☒ complete goals, events or outcomes

Any All

Select a goal

Search

Select an event

Search

Select an outcome

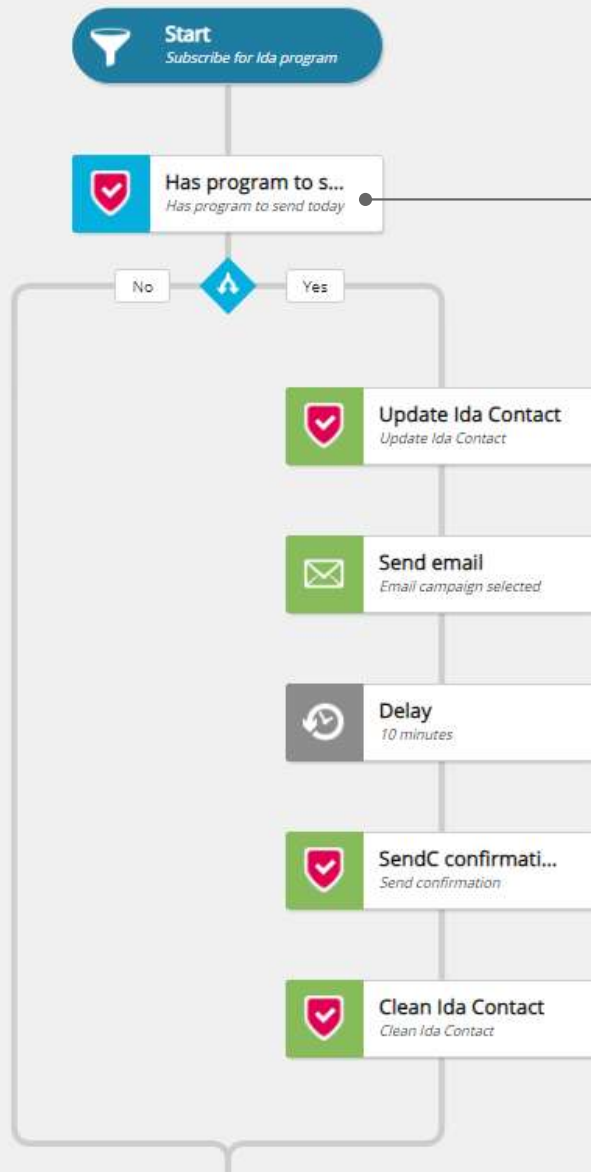
Search

Subscribe for Ida program

- ☐ meet specified rules



Marketing
Automation

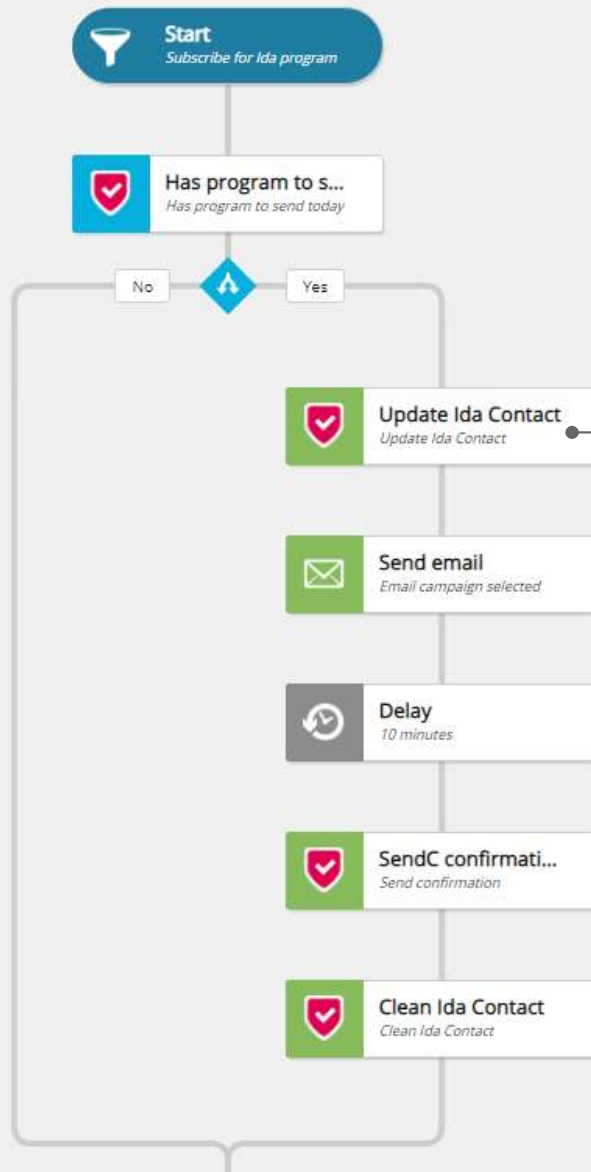


Custom listener
Call to E-Service and ask:
“Do I have to send an e-mail now?”

Request:
/program/{programId}/mail

Response:

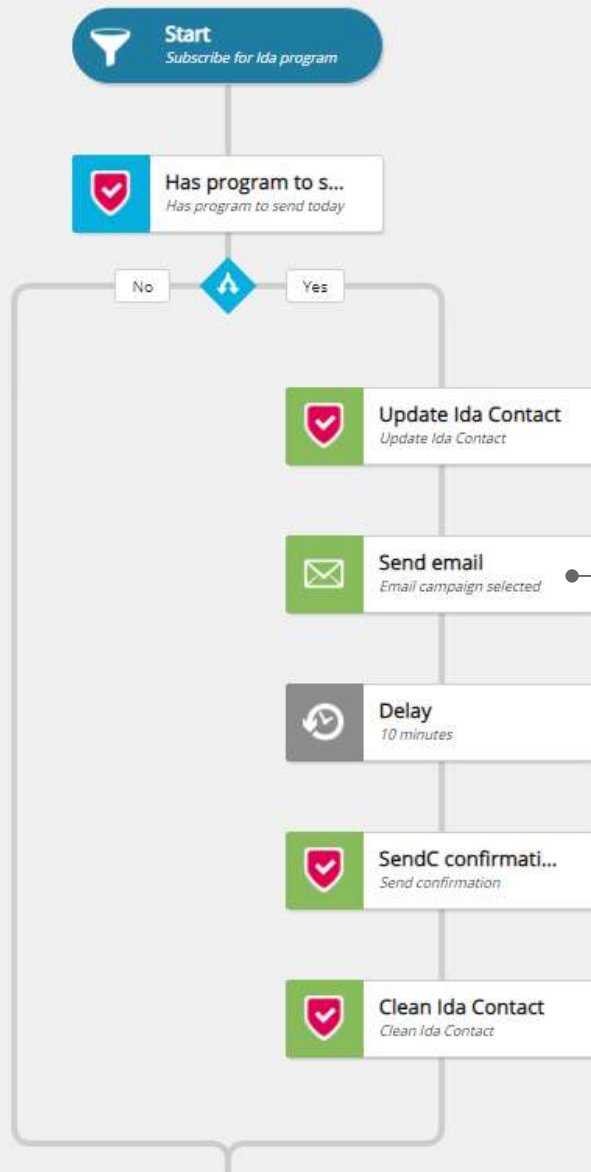
```
{  
  "mail": "boolean"  
}
```



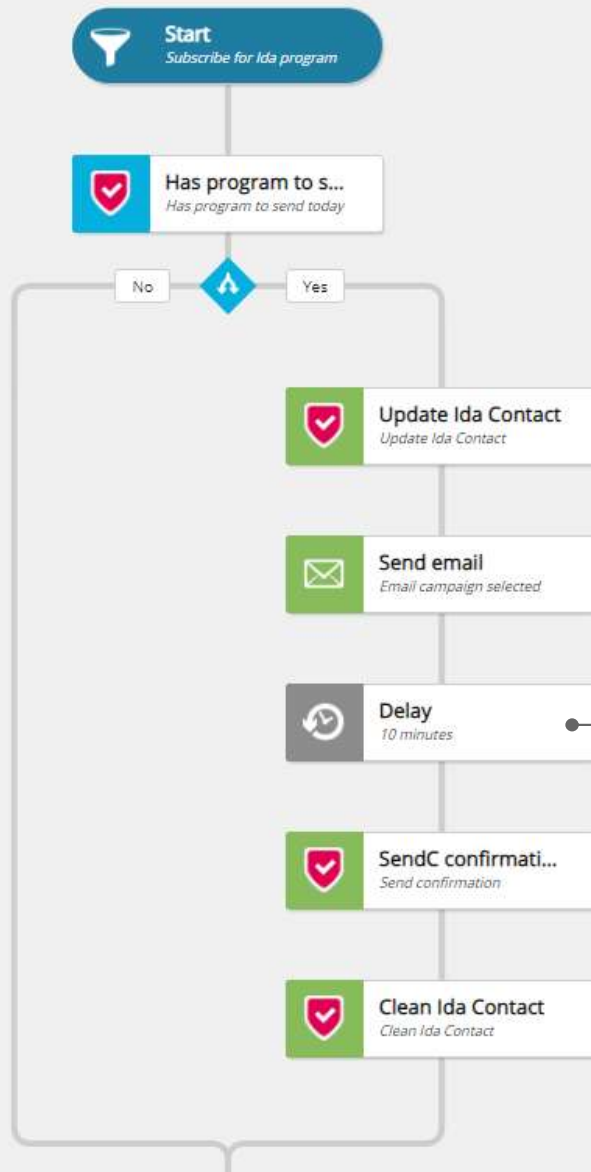
Custom action
Call to E-Service and save
Customer information to contact

Request:
`/program/{programId}/mail/detail`
s

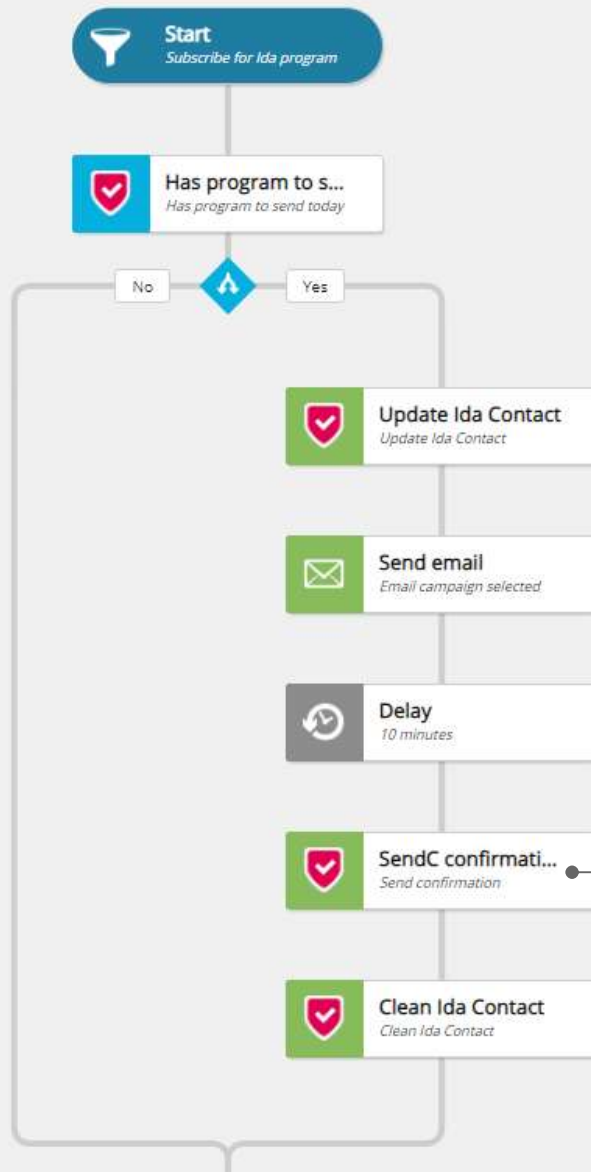
Response:
{
 "gender": "string",
 ...
 "email": "user@example.com",
 "programTitle": "string",
 "instructions": "array<string>",
 "infoUnitId": "string"
}



EXM action
Send E-Mail to customer

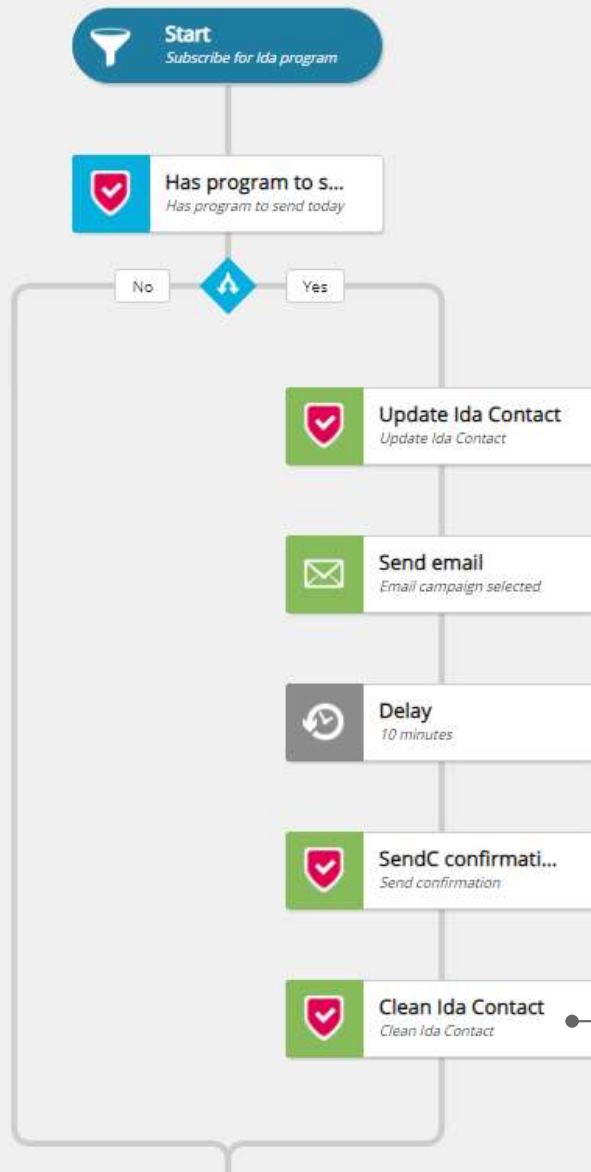


Sitecore action
Wait until EXM has sent the e-mail.

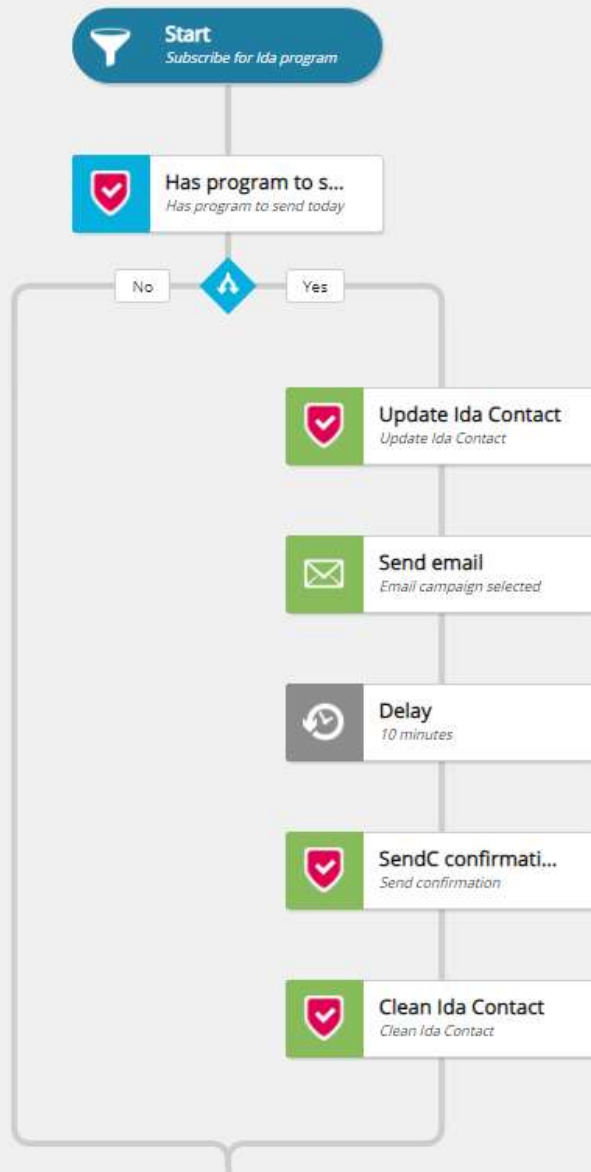


Custom action
Call to E-Service and confirm sending of e-mail.

Request:
`/programs/{programId}/infounits/{infoUnitId}`



Custom action
Clean up internal stuff





Custom listener
5 minutes

No

Yes



Return to start

Sitecore listener Wait x minutes for "unsubscribe"

Rule

where the contact has triggered the goal
Unsubscribe for Ida program in the past 5
Minutes

[Edit in rule set editor](#)

Persons who stop a program within x minutes and start it again immediately run through the plan without action, because the goal is still active!



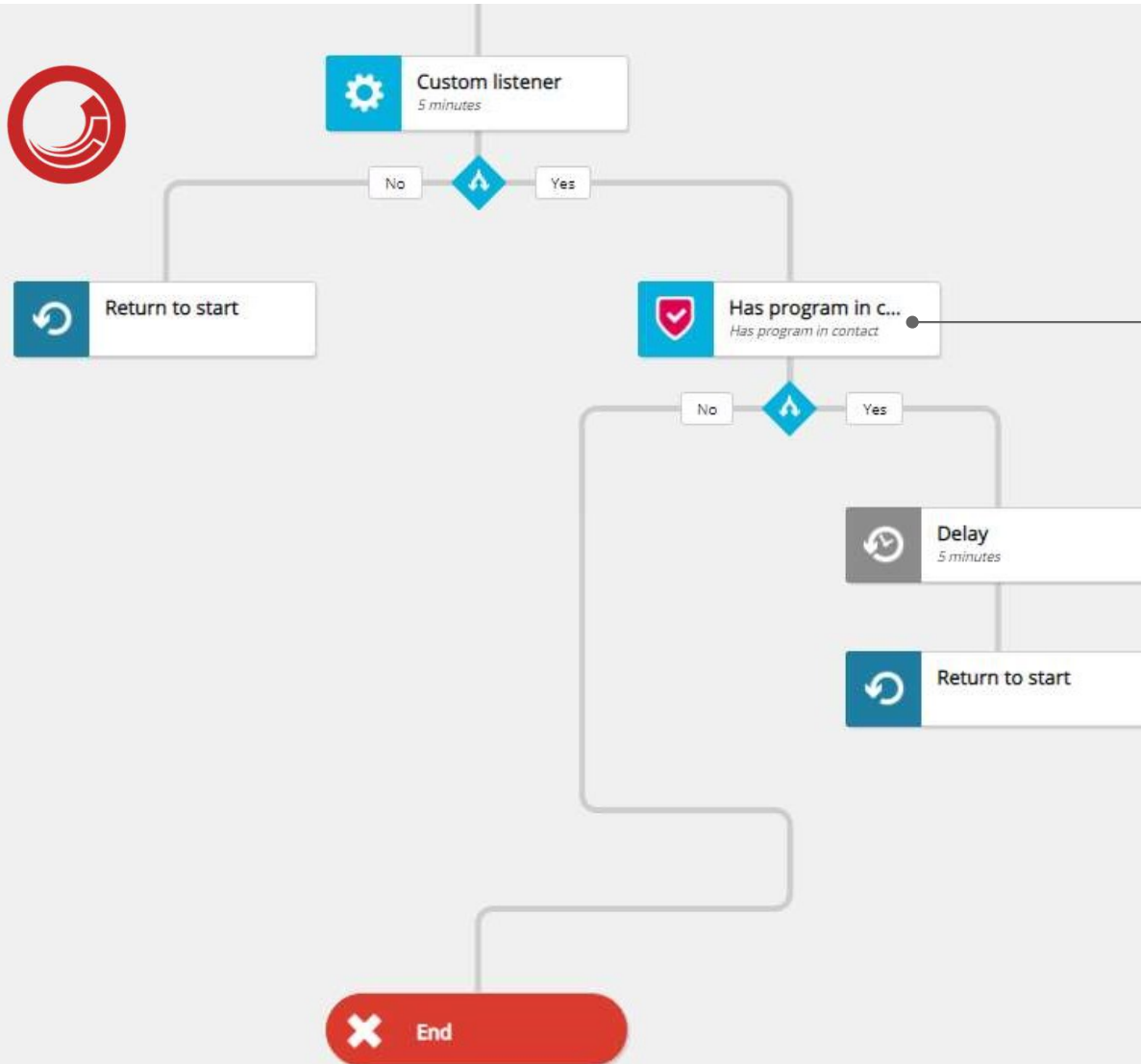
HH

:

MM



End



Custom listener
Check if there is still a
program stored in the
contact.



Newsletter – Done



E-Service
(REST)



Content Editor



Email
Experience
Manager



Experience
Profile



Marketing
Automation



Learnings



E-Service
(REST)



Content Editor



Email
Experience
Manager



Experience
Profile



Marketing
Automation



Sitecore Support



```

graph TD
    A[Blue] --> B[Green]
    B --> C[Red]
    B --> D[Red]
    B --> E[Red]
  
```



Sitecore Support



Learnings xConnect!



xConnect
Collection Search – Index Worker
(Windows Service)



xConnect
Collection Search
(WebApp)



Sitecore



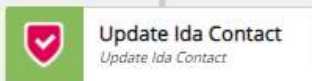
xConnect
Marketing Automation - Engine
(Windows Service)



xConnect
Marketing Automation
(WebApp)

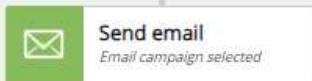


Learnings EXM Dispatcher!



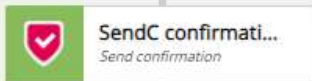
Update Ida Contact
Update Ida Contact

Add information to contact



Send email
Email campaign selected

Add E-Mail to EXM-queue



SendC confirmati...
Send confirmation

...



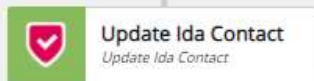
Clean Ida Contact
Clean Ida Contact

Remove information from contact

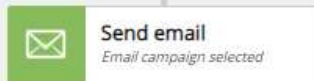
EXM send the E-Mail



Learnings EXM Dispatcher!

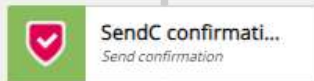


Add information to contact



Add E-Mail to EXM-queue

Wait 10 minutes



...



Remove information from contact

EXM send the E-Mail



Learnings From Dispatch

The screenshot shows the Chrome DevTools Network tab. The top toolbar includes icons for Elements, Console, Application, Sources, Network (selected), Performance, Memory, Security, and Audits. The Network tab shows a list of requests with a filter bar and a timeline. The selected request is a POST to `http://suva-icomm-sc9.local/sitecore/api/ma/plans/?cultureName=de-CH`. The status is 500 Internal Server Error. The response headers are visible, showing `Cache-Control: no-store, must-revalidate, no-cache, private` and `Content-Type: application/json; charset=utf-8`.

Name	Headers	Preview	Response	Cookies	Timing
?cultureName=de-CH	<div><div>General</div><div>Request URL: <code>http://suva-icomm-sc9.local/sitecore/api/ma/plans/?cultureName=de-CH</code></div><div>Request Method: POST</div><div>Status Code: 500 Internal Server Error</div><div>Remote Address: 127.0.0.1:80</div><div>Referrer Policy: no-referrer-when-downgrade</div></div> <div><div>Response Headers</div><div>view source</div><div>Cache-Control: no-store, must-revalidate, no-cache, private</div><div>Content-Length: 6904</div><div>Content-Type: application/json; charset=utf-8</div><div>Date: Mon, 29 Apr 2019 11:12:34 GMT</div><div>Pragma: no-store, no-cache</div><div>X-Frame-Options: SAMEORIGIN</div></div>				



Learnings default language

Edit User□ ×
Edit the information about the user.

GENERALMEMBER OFPROFILE**LANGUAGE SETTINGS**INFORMATION

Sitecore Client

Client Language: Default ▾

Regional ISO Code: Default ▾

Content

Default Content Language: German (Switzerland) : Deutsch (Schweiz) ▾



Learnings default baggage

```
private void AddContactToPlan(Guid contactId)
{
    var operationsClient = DependencyResolver.Current.GetService<IAutomationOperationsClient>();

    var request = new EnrollmentRequest(contactId, _idaPlanId);

    BatchEnrollmentRequestResult result = operationsClient.EnrollInPlanDirect(new[] {request});
}
```

Subscribe for Ida program



☐ meet specified rules



Start

Subscribe for Ida program



Learnings enroll by goal



Content Editor



Email
Experience
Manager



Experience
Profile



Marketing
Automation



Questions?

andreas.baumgartner@suva.ch

christoph.brunner@viu.ch



E-Service
(REST)



Content Editor



Email
Experience
Manager



Experience
Profile



Marketing
Automation



Sitecore Support



E-Service
(REST)



Content Editor



Email
Experience
Manager



Experience
Profile



Marketing
Automation



Sitecore Support