SITETM VISUAL TEMPLATE EDITOR LOOKBOOK

2022



Bluecore

WELCOME

Bluecore Site™ is the only personalization platform purpose-built for digital retailers to drive more revenue. Create targeted online shopping experiences and deliver a personalized journey for different customer segments, delivering up to:

- +73% lifts in conversion rates
- +40% growth in list size
- +10% increase in Average Order Value (AOV)

Increase conversion rates by leveraging a suite of abandonment prevention and cart recovery campaigns proven to drive incremental conversions and revenue. Personalize the customer experience by serving your known customers with relevant messaging based on their known Bluecore predictive affinities, providing more targeted offers and messages, and showing next best product recommendations based on their current and previous behavior on your site, as well as their Customer 360 profile.

Combined with Bluecore's patented and deterministic methodology, Bluecore Site™'s lead capture functionality enables you to increase your email and SMS list sizes by encouraging sign-ups using different types of modals, popups, banners, and inline embedded campaigns.

Using the Bluecore Site™ user interface and the Visual Template Editor (VTE), launch different types of popups, inline, and banner campaigns in a simplified, drag-and-drop workflow without any complex coding!

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GETTING STARTED

Get started by building out your Bluecore Site™ campaign by following the steps outlined in this <u>article</u>. At a very high level, this article provides an overview of the different campaign types that are available, the campaign settings, targeting rules, and creating a template. After you've selected a campaign type and configured the settings, use this guide to help you navigate through configuring targeting rules, template type, and designing the actual campaign with some of our best design inspiration!

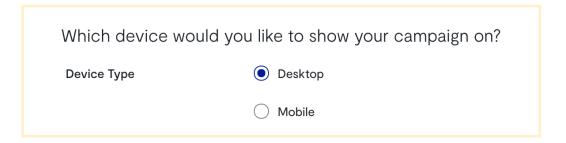


TARGETING

After you've completed the <u>campaign settings</u>, the next step is to determine the audience to display the campaign to. This section outlines the different targeting criteria that are available within Bluecore Site™ and allows you to determine if the campaign will be targeted on a desktop or mobile device.

DEVICE TYPE

Begin by determining if the campaign will be shown on a desktop or mobile device.



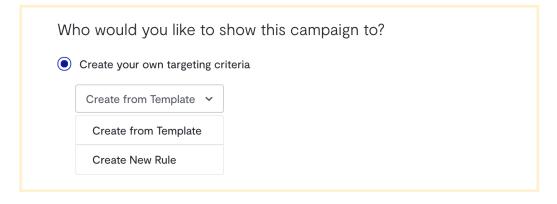


Optimize for Desktop and Mobile Devices Separately:

On-site campaigns need to be formatted according to screen and device sizes, therefore it's important to build mobile and desktop campaigns separately. Once you select the device type, Bluecore will know when to surface each type of campaign (that will contain different canvas sizes and, if you choose, different layouts or designs). This ensures customers will have a seamless experience, regardless of the device they're viewing the campaign on.

TARGETING RULES

After selecting a device type, create your own targeting criteria from scratch with Create New Rule or from an existing rule with Create from Template. If you use an existing rule, you'll be presented with options for rules you've either previously saved as a targeting rule template or that are currently being used in a different Site™ campaign.





When creating a new rule, define the campaign's audience based on the specific customer behavior or criteria below:

URL Based Conditions: Target customers based on any URL criteria, such as a current URL, referring URL, or the first URL the customer landed on.

Visit Frequency Conditions: Target customers based on their visit frequency on your website, such as the number of sessions, visits, or page views within a specific timeframe.

Geolocation Conditions: Target customers based on a country, state, or language. Geolocation is based on the customer's IP address.

User Engagement Conditions: Target customers based on their engagement with this campaign or other on-site campaigns.

Date/Time Conditions: Target customers based on their session-based timing and criteria around local date and time.

Tech Rules & Exit Prevention Conditions: Target customers based on technical parameters and interactions with the campaign, such as a cookie, the amount of time spent, idle time, and intent to leave the page.

Bluecore Audience Conditions: Target customers based on Bluecore audiences that you've previously set up in Bluecore's audience builder, as well as their known status.

Device and Browser Conditions: Target customers based on a device, IP address, or operating system.

Product Interaction Conditions: Target customers based on specific product criteria such as products that were viewed, the price, out of stock, or coming soon.

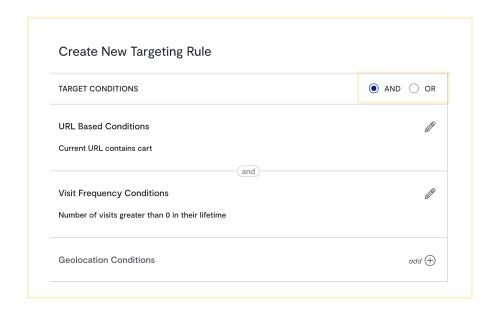
Cart Based Criteria: Target customers based on the value of their cart.



Using the And/Or Operators:



By default, multiple rules set up in one category of conditions will be connected by an *AND* operator, meaning that all the rules you set up for URL based conditions, for example, will have to be true for your site campaign to be displayed. However, you can always select the *OR* radio button at the top right of the targeting condition screen to set an *OR* operator between various rules:



After creating a new rule, you'll be given the option to Save as Template, in case you'd like to store a set of rules as a template that can be easily applied to other campaigns.



MESSAGE

Before designing the campaign, you need to select a style or a template type. Select from one of the available templates based on the objective of the campaign. For example, exit prevention campaigns should be disruptive to the exiting experience, so a fullscreen or a popup is recommended. A banner would be more suited for a coupon offer or announcement. An infobar is best for a coupon offer or shipping announcement. Learn more about the template types below.

Fullscreen: A popup overlay displaying over the majority of the customer's screen.

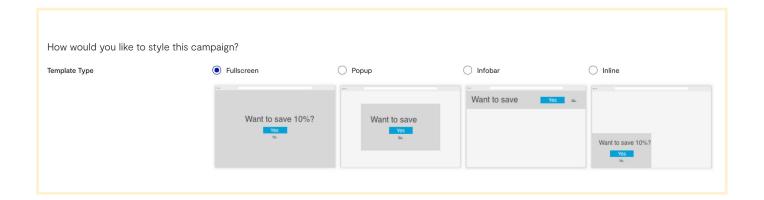
Popup: A partial screen overlay.

Banner: A block at the top or bottom of the website.

Infobar: A block at the top or bottom of the website.

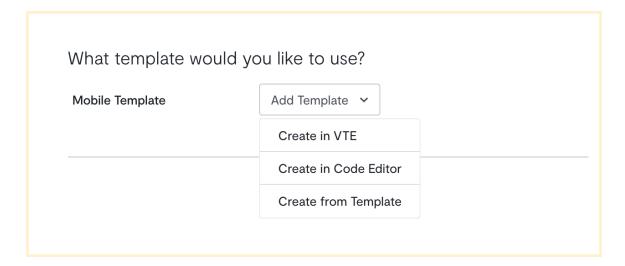
Inline: Embedded on the page based on a specific location determined by a div ID.

To see each template type in action, check out the examples section of our guide <u>here.</u>





Next, select to create or copy over your template:



Create in Code Editor: This option allows you to create your template through custom HTML and CSS in our code editor.

Create from Template: When selecting this option, you'll see a toggle that allows you to either choose from an existing template (used by an existing Site™ campaign in your account) or one of Bluecore's pre-built templates (automatically added to your account). Our pre-built templates include variations of cart abandonment, exit intent, and email capture campaign, as well as holiday campaigns that can be used for promotional sales!

Create in VTE: With this option, you'll start building a template from scratch through our drag-and-drop editor. Read further to find all the elements of your design that you can modify or add to create the perfect design.



Make It Your Own:

If you select an existing or pre-built template - don't worry, you'll be able to use our Visual Template Editor to modify any aspect of the design! The options in this guide will still apply to the ways you can edit this design if you choose.

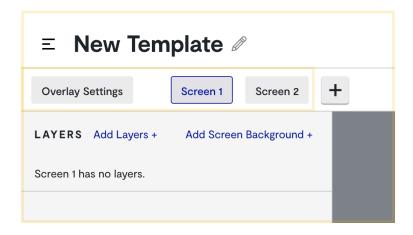
VISUAL TEMPLATE EDITOR

Bluecore SiteTM's Visual Template Editor (VTE) is a powerful, but simple-to-use campaign template creation and management tool. Drag and drop elements to build an on-site campaign or template that is a reflection of your <u>brand</u>.

The best part about our template editor? There's no coding skills required! This section outlines the different widgets and elements necessary to get your Site™ campaigns up and running.

OVERLAY AND SCREENS

When navigating VTE for the first time, there are three different tabs in the editor that need to be configured for the campaign.



OVERLAY SETTINGS

While this isn't a screen that needs to be designed separately, it's important to visit this tab to <u>configure overlay settings</u> that are applicable to the entire campaign. You can use this section to add an animation effect or background color, customize the position of a popup, and more!

SCREEN 1

This first screen of the campaign is exactly what it sounds like. It's the first thing your customers will see when the campaign is displayed, and usually requires them to take some kind of action with an incentive. Simply add layers (described in the next section below) to start adding elements like copy, images, or an email input form to this screen.



SCREEN 2

This second screen follows your first one. It's often used to reassure customers that they've submitted the required information. If there was an incentive promised on the first screen, it's usually displayed on this one. You can add elements (like copy or a coupon code) by adding the layers described in the next section below. If your campaign experience only requires one screen (for example, an infobar advertising an event that doesn't require any action to be taken), then you can simply leave this screen blank by not adding any layers to it.



Provide Clear Next Steps:

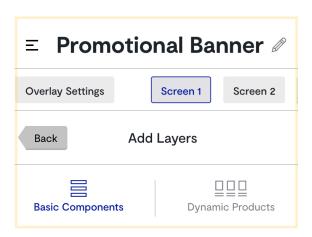
Take advantage of your confirmation screen to provide value and next steps! Depending on the type of campaign, you may want to think about including a CTA that directs customers to a check-out or cart page or encourages them to keep shopping, or even display a coupon code.

LAYERS

Layers are the building blocks of your template. They allow you to add two types of components that can be used to create a template: **basic components** and **dynamic products**. Each of these components create a new layer. Read more about each of these below.

BASIC COMPONENTS

Basic components are the layers that are used to build key elements of an on-site campaign, including text, images, email capture forms, and more!



TEXT

Style your campaign with our <u>rich text editor</u>! Select the perfect font, color, size, alignment, and many more customizations.



Brand Your Content with Custom Fonts:

Bluecore supports custom fonts. However, it's important to choose a web-safe font as a fallback. The following web-safe fonts are supported: Arial, Arial Black, Century Gothic, Courier New, Georgia, Helvetica, Helvetica Neue, Impact, Lucida Console, Lucida Sans, Palatino, Tahoma, Trebuchet, Times New Roman, and Verdana. Learn more about managing custom fonts and selecting fallbacks in our Knowledge Base.

IMAGE

Add an image directly into your on-site campaign with this element. Images can be managed through the <u>asset manager</u> or linked directly through an image source. <u>Configure the image</u> with padding, alignment, and background colors to match your brand throughout the campaign.

DIVIDER

Use a <u>divider</u> to add a break or division between different elements in the popup. Make the dividing lines pop by changing the color, thickness, and line type to give a visual break to customers.

COUPONS

Add a <u>coupon</u> to any campaign to incentivize customers to complete the action requested on the popup. Coupons can be unique that are different for each submission, or a generic coupon that would be the same for all customers.



Configuring Coupons:

If using unique coupons, be sure to upload and manage your coupon banks for any Site $^{\text{TM}}$ campaigns using this <u>article</u>. It's important to use a different coupon bank than the one that is being used for an email campaign.

CALL-TO-ACTION BUTTON

A <u>call-to-action button</u> can be used to drive a user to a specific link within the popup. For example, after they've entered their email address or phone number, direct them to continue shopping, view their coupon code, or link a specific product or page on your site.

CLOSE BUTTON

Configure a unique design that appears on the popup to <u>dismiss</u> the campaign. If a close button isn't configured, the campaign will close if someone clicks outside of it.



NEXT BUTTON

The <u>next screen button</u> is used to drive users between the different screens of the popup. It *cannot* be used to link externally from the popup.

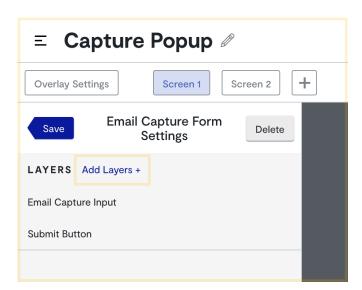
EMAIL CAPTURE FORM

When the form element is added, two layers are automatically created: Email Capture Input and *Submit Button*. The layer settings allow you to make many design adjustments to your email capture form and corresponding button, including adding labels, changing fonts and colors, and modifying the form's position on the screen. Be sure to go into each individual layer and apply the appropriate configurations for each – read more about configuration options here.



Capture Additional Information:

Need to add additional input forms to collect information such as name and preferences? Once you've added the email capture element, simply click Add Layers + in the Email Capture Settings to insert a text input, drop-down, checkbox, and more!



SMS CAPTURE FORM

Use this option to create an area for users to enter their mobile phone number. When you add SMS capture, three layers are automatically created: an SMS capture checkbox, input form, and button. You can configure text, labels, and more in each layer's settings.

• NOTE: This feature is currently in pilot. Please contact your Account Manager to learn more.

TIMER

Add the timer widget to a campaign to express a sense of urgency to your customers or drive excitement for a new product release by showing a timer counting down to the release date. Use this widget to show a countdown to something with hours, minutes, and seconds. You can modify the timer's design (including adding labels, changing fonts and colors, and setting the countdown date) via the <u>timer settings.</u>

SPINNER

Use a spinner (or spin-to-win widget) on an on-site campaign to gamify a campaign experience. Entice your customers to win something, such as a percentage off or free shipping by entering their email address or other information about themselves. After adding the spinner widget as a layer, you'll be able to <u>customize aspects of its design in the layer settings</u> - including the spinner's options, colors, default winner, and more!

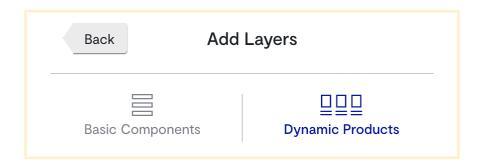
SMART CONTENT

Add a Smart Content widget to create more personalized and dynamic content for your customers. Use Smart Content to surface different content based on customer attributes of the customer viewing the campaign. For example, include loyalty-specific messaging if the customer is a loyalty member. If they're not, configure a fallback to show a promotion inviting them to join the loyalty program.



DYNAMIC PRODUCTS UUU

Site Recs™ allow you to surface the most relevant products for each customer. These product blocks serve as placeholders for dynamically populated content, like product recommendations. Site Recs™ are now available for select customers before being rolled out globally. Please reach out to your Customer Success Manager (CSM) or Account Manager (AM) if you'd like to leverage this feature.



First, choose a product block layout to drag and drop into your template, then customize the look and feel. Then, add the logic (a recommendation rule), which determines the right product to deliver to each customer.

LAYOUTS

List: Show dynamic product recommendations in a vertical list layout with up to

Single Row: Display a single row of dynamic product recommendations.

CONFIGURATIONS

Once you've selected a layout for your products, you can customize their design (including spacing, alignment, slider options, and more) by editing your <u>product block configurations</u>. Please be sure to add all configurations before continuing to the next step of selecting a recommendation rule.



RECOMMENDATION RULES

<u>Best Sellers:</u> Displays highest-selling products based on purchase count from the last 7 days.

New Arrivals: Displays new products from the last 7 days.

<u>Co-Recommendations:</u> Displays products generated through a collaborative-based approach that analyzes similar customers' engagement with the catalog.

Recently Viewed: Displays specific products that the customer previously viewed during their session.

<u>Smart Recommendations:</u> Displays a personalized collection of next best product recommendations for each customer based on their own historical purchase, site and email activity.

<u>Category Page Recommendations:</u> Best used with category-level pages to display products generated through a collaborative-based approach that analyzes similar customers' engagement with the catalog after viewing the same page.

<u>Cart Page Recommendations:</u> Best used with cart pages to display products generated through a collaborative-based approach that analyzes similar customers' engagement with the catalog after adding similar products to their cart.



Add a Fallback:

Be sure to add a fallback rule in the event that the current rule does not generate enough recommendations to populate the product block.



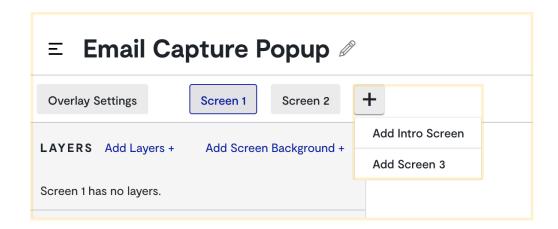
TIPS AND TRICKS

Think About Your User Flow and Number of Screens

If you're using Bluecore Site™ to build an on-site popup, you'll probably want to build two separate screens (one where a user takes an action, such as entering their email address, and one where a user receives confirmation, for example a "thank you!" or a coupon code).

However, you're not constrained to two screens! Make sure to think about the steps that your particular campaign requires. For example, if you're using your on-site campaign to display a quick notification about a sale or shipping delays, you may only need one screen. If your campaign requires multiple steps and capture forms, you may want to add additional screens.

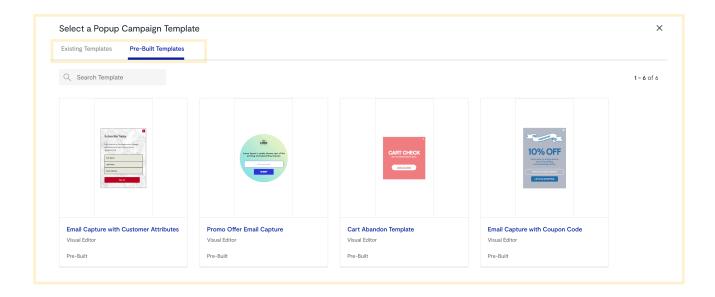
You can implement one screen by leaving Screen 2 empty (not adding any layers to it). You can add up to two additional screens by clicking on the + sign to the right of Screen 2:



Don't Know Where to Start with Your Design? Try a Pre-Built Template

Choose one of our pre-built templates to use as a starting point! When you select Create from Template in the <u>Message</u> tab, you'll find pre-built templates provided by Bluecore. Note that these will match the device and template type you chose at the beginning of the campaign creation flow. For example, if you selected the mobile device type and the popup template type, you'll see corresponding options under Pre-Built Templates:





The pre-built template library currently includes the following types of templates:

Fullscreen: Email Capture, Email Capture with Customer Attributes, Exit Intent, Promotional Exit Intent, and SMS Lead Capture.

Popup: Promotional/Holiday Sale, Email Capture with Coupon Code, Holiday Email Capture, Email Capture with Intro Screen, Email Capture with Customer Attributes, Email Capture with Spinner, SMS Capture with Spinner, SMS Capture with Timer, Cart Abandon with Product Recommendation, Email and SMS Capture.

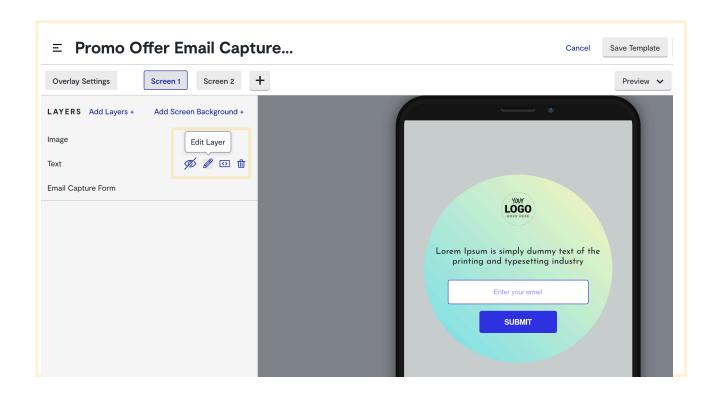
Infobar: Notify Me/Back In Stock, Shipping Banner, Cookie Disclaimer, Promotional/Holiday Banner, Product Launch Timer, Coupon Code Banner.

Inline Pre-built: Inline Email Capture, Footer Email Capture, Email Capture with Customer Attribute, Newsletter Email Capture, SMS Capture.

After selecting a pre-built template, modify elements of the design to match your specific brand and campaign requirements.

Click the pencil icon to the right of each layer to modify elements like image source, font, colors, and more, and make these designs uniquely yours without having to start from scratch.





Keep These Content Elements in Mind

When modifying a pre-built template or designing your own template from scratch, consider incorporating at least some of these important content elements:

Headline Copy: Keep it as engaging and relevant as possible. Make sure to highlight what you're offering and why it matters (whether it's a discount, a way to stay informed on upcoming sales, or an exciting new product).

Call-to-Action: Encourage your customers to take an action as a result of the campaign, such as: signing up for emails, navigating to a checkout page, or clicking through to a recommended product.

Coupon Offer Code (if applicable): Consider offering an incentive for customers to return to their cart or to sign up for marketing emails.

Email Capture Field (if applicable): If you're looking for more subscribers, email capture campaigns are a great way to do it. Display your email field prominently so that customers know where and how to sign up.

Eye-catching Image: Include an eye-catching image in your design to captivate the viewer and encourage them to engage with your campaign.



Layout Specification Recommendations

There's no hard and fast rule when it comes to canvas sizes for designing the layouts and images of your popups or banners, but if you need a starting place, here are some suggestions:

Desktop Popup: 850px x 500px (or larger for fullscreen)

Mobile Popup: 320px x 350px

Note: Google recommends that popups and interstitials only take up 15% of the screen. Full-sized popups are discouraged by Google's <u>mobile best practices</u> as they may negatively affect your SEO rankings.

Sidebar (Inline or Popup): 650px x 350px

Corner (Inline or Popup): 500px x 250px

Infobar: 340px x 80px

Think Outside the (Popup) Box!

Bluecore supports many different campaign types, so remember that you're not constrained to a traditional popup. You can create an inline campaign where your content (whether it's a capture form, set of product recommendations, promotional message, or full-sized landing page) is displayed directly on your website by being tied to a CSS selector. You can also use the infobar template type to create banners at the top or bottom of your website. These banners can contain sale or shipping messages, capture forms, countdown timers, and more!

Connect your Site™ Campaign to a Welcome Email

You may be capturing an email address through a Bluecore Site™ campaign, so the next step is to then send a welcome email to the customer. Follow the steps outlined in this <u>article</u> to connect your Bluecore Site™ campaign to a transactional or real-time welcome email campaign.



See your On-site Experience in Action

Preview your campaign and interact with it prior to launch so you can fully vet a customer's experience. Check out <u>this article</u> to learn about the multiple ways you can test and preview a Site™ campaign live on your site.

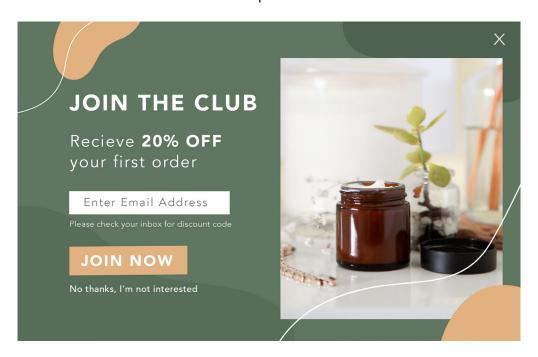
Test and Iterate Your Campaign

Are you curious about how certain offers or pieces of content will perform against each other? You can <u>set up an A/B</u> test to test two campaigns against each other. You can analyze results and determine a winner using our <u>Site Analytics</u>.

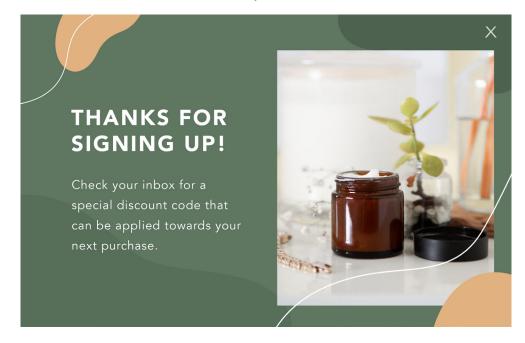


EXAMPLES: EMAIL CAPTURE (POPUP)

Desktop Screen 1



Desktop Screen 2



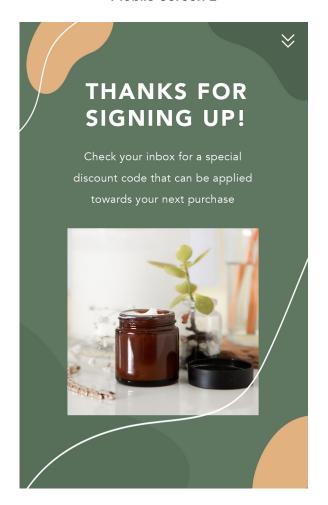


EXAMPLES: EMAIL CAPTURE (POPUP)

Mobile Screen 1



Mobile Screen 2



CORE USE CASES

EXAMPLES: EMAIL CAPTURE (INFOBAR)





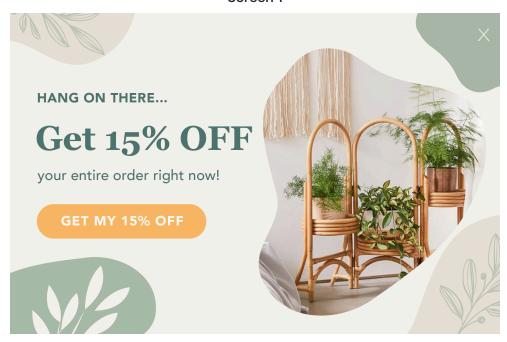
EXAMPLES: EMAIL CAPTURE (INLINE)





EXAMPLES: EXIT INTENT

Screen 1

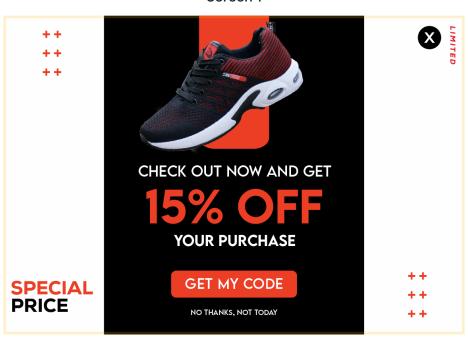


Screen 2

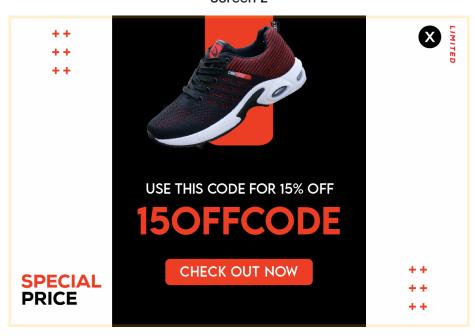


EXAMPLES: CART ABANDONMENT

Screen 1



Screen 2



EXAMPLES: INFOBAR WITH PROMOTION OR "PROMO ECHO"

Use code 15OFFCODE at checkout for 15% off





Use this type of campaign as a standalone unintrusive banner offering a promotion. Alternatively, trigger it after a shopper engages with a popup that shows a coupon code. The infobar will echo the promotion or code that was shown in the popup and will stay visible as they navigate the site (unless they close it), further encouraging them to make a purchase.

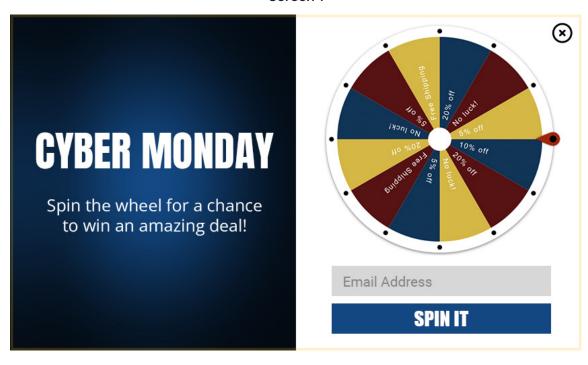


EXAMPLES: PROMOTION/SALE POPUP WITH A TIMER



EXAMPLES: PROMOTION/SALE POPUP WITH A SPINNER

Screen 1



Screen 2



EXAMPLES: AUDIENCE-DRIVEN DISCOUNT AFFINITY ONSITE MESSAGE

Shopper with No Discount Affinity



Shopper with Discount Affinity



PRODUCT AND AUDIENCE-DRIVEN CAMPAIGNS

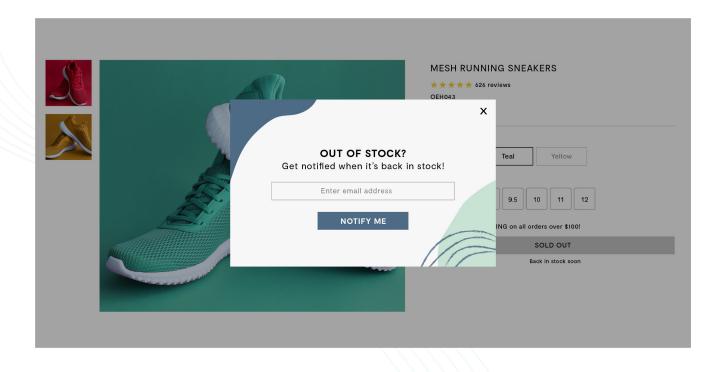
EXAMPLES: AUDIENCE-DRIVEN CATEGORY AFFINITY ONSITE MESSAGE

Shopper with a Category Affinity to Sweaters and a Discount Affinity





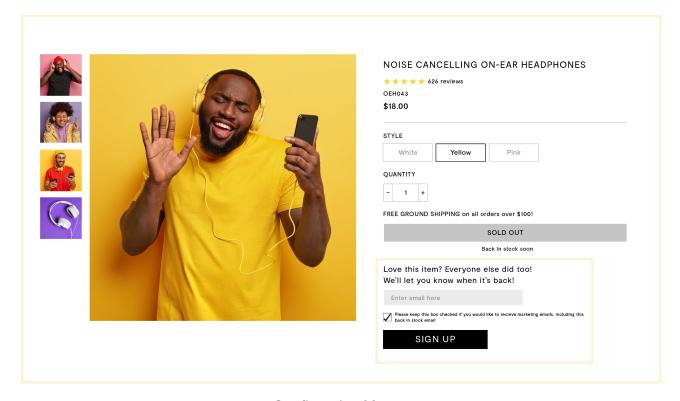
PRODUCT AND AUDIENCE-DRIVEN CAMPAIGNS **EXAMPLES: BACK IN STOCK/ NOTIFY ME (POPUP)**



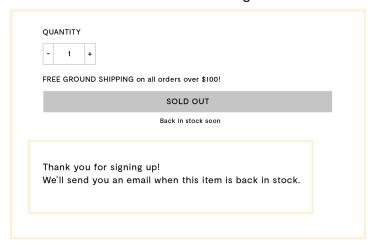


PRODUCT AND AUDIENCE-DRIVEN CAMPAIGNS

EXAMPLES: BACK IN STOCK/ NOTIFY ME (INLINE)

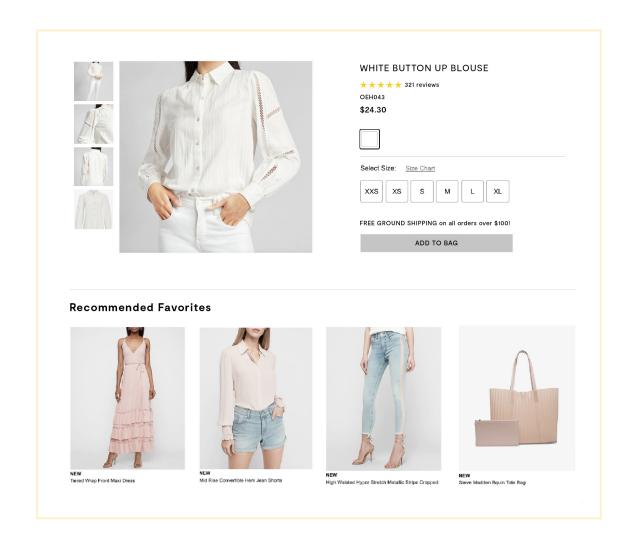


Confirmation Message





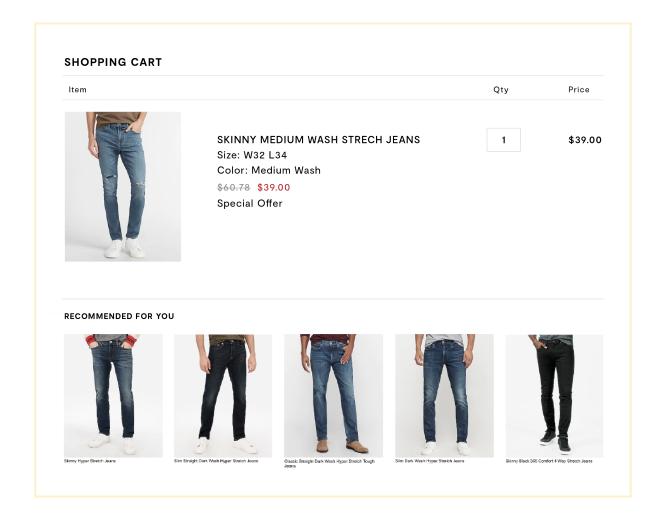
PRODUCT AND AUDIENCE-DRIVEN CAMPAIGNS EXAMPLES: SITE RECSTM PDP PRODUCT RECOMMENDATIONS (INLINE)





PRODUCT AND AUDIENCE-DRIVEN CAMPAIGNS

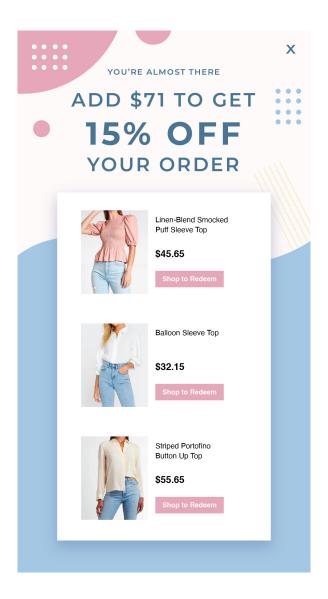
EXAMPLES: SITE RECS™ CART/CHECKOUT PAGE PRODUCT RECOMMENDATIONS (INLINE)





PRODUCT AND AUDIENCE-DRIVEN CAMPAIGNS

EXAMPLES: SITE RECS™ CART AMOUNT PRODUCT RECOMMENDATIONS (POPUP)





Drive higher cart sizes by upselling your shopper to a minimum order value to qualify for free shipping or a discount code. Create a <u>Site Recs™</u> popup that reminds your shopper of how much they have left before qualifying for the promotion and surface product recommendations within a certain price range that are relevant to them or the products already in their cart.



EXAMPLES: MULTI-CHANNEL PRODUCT AFFINITY



Communicate™ Email - Product Affinity





Site™ Popup - Product Affinity





Target a specific product affinity audience (for example: customers who have an affinity towards sneakers that cost less than \$100) in both email and on-site campaigns. Send an email to a <u>product preferences audience</u>, and then configure a matching on-site campaign to <u>target your audience</u>. Customers will have a streamlined and personalized multi-channel experience: they'll see similar messaging whether they come directly to your site, or open and click through the email.



MULTI-CHANNEL EXIT INTENT



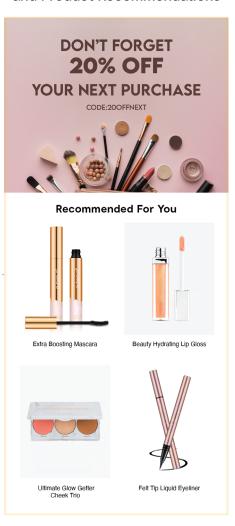
Communicate™ Email - Exit Intent Offer and Product Recommendations



Site™ Popup - Exit Intent









Follow up with shoppers who engage with your Site™ campaigns but don't convert with an email to get them back to your site. Create an Exit Intent popup encouraging customers to stay on the site. Then, create a Communicate™ audience based on customer behaviors (for example: customers who engaged with Exit Intent popup and did not make a purchase in the last 24 hours). Send a matching email to this audience with personalized product recommendations and offers.

Looking for More?

Now that you've learned about all the different elements and components of Bluecore Site™ VTE, get started by creating a campaign!