

Optimization Readiness Checklist



Is your Sitecore implementation technically and functionally ready for optimization?

Before you can implement your roadmap, you need to check that your site is technically capable of optimization. This checklist will help you make sure you can implement what you've planned, and can also be done before roadmapping to identify any technical roadblocks that you can either address with your technical team, or in some cases work around in your planning.

Customer: John Doe As at: Monday, May 11, 2020
 Site URL: https://www.companywebsite.com Sitecore version: 9.x

5 Marketing Scan Checklist		Priority	Status	Comments
Experience Analytics				
A	Verify that the site selector in Experience Analytics reflect all the sites in the Sitecore instance	Critical		
B	Visits are tracking in the Experience Analytics dashboard	Critical		
C	Value is tracking in the Experience Analytics dashboard	Critical		
D	Audience - GeoIP tracking countries, and you can drill into regions	Critical		
E	Acquisition - Channels are tracking at a high level	Recommended		
F	Acquisition - A test campaign appears in the Analytics reports	Critical		
G	Behavior - Pages are tracking ("page by item" report), and the sort order is configured to show from highest to lowest by page views	Recommended		
H	Behavior - Assets tracking show a test PDF download	Nice to Have		
I	Audience - Pattern tracking	Recommended		
J	Goals report shows all relevant goals tracking on the Goals report including: Page view, form submissions, and custom click events	Critical		
Notes:				
Experience Profile (if contacts are being captured)				
K	Ensure that a contact identification strategy is in place to capture a user's email and other information submitted in Sitecore Forms (and others, if applicable) into xDB and an individual user's contact record	Critical		
L	Experience Profile dashboard - contacts are listed with interaction data and columns (including Location) are populated	Critical		
M	Experience Profile search results - a marketer can filter or search through contacts	Critical		
N	Experience Profile - Individual contact record opens and shows latest events	Critical		
O	Experience Profile - Individual contact record loads and the Timeline displays latest events	Critical		
Notes:				
Experience Editor				
P	Homepage can be launched in Experience Editor	Critical		
Q	Components appear on page with resemblance to site and w/o code markup on screen	Critical		
R	Floating toolbar exists on important components allowing marketers to select the personalization or ab testing buttons	Critical		
S	Common components are bound to datasources to support personalization (as opposed to template driven)	Recommended		
Notes:				
Miscellaneous				
T	A simple personalization rule fires and shows personalized content when published on a test page	Critical		
U	Content Editor - Pages that belong to a custom approval/publishing workflow include "Approve With Test" step which allows content authors to start component tests on pages	Critical		
V	Campaign Creator - tool loads as expected	Critical		
W	Verify that Path Analyzer is deployed OOTB and rebuilds daily	Critical		
X	A simple A/B test can be launched through workflow on a component, and the Test Results dialog shows data including reach for both variants	Critical		
Notes:				