



Welcome to Contentsquare Implementation

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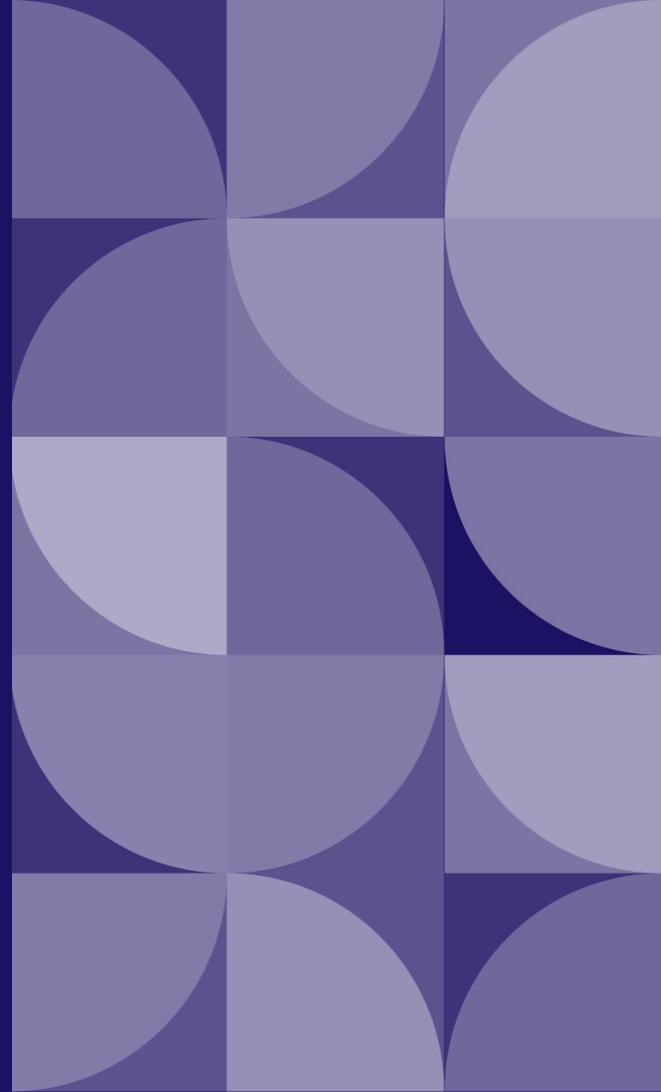
- Welcome to Contentsquare Implementation
- Learn the key terms & tools
- Prepare for Implementation
- Start Using Contentsquare

Lesson Time: 20 mins



Learn the basics about tasks, timelines, & terminology

Welcome to Contentsquare Implementation



Learn the basics

Set yourself up for success

- **Who** will you need (from your team and ours)?
- **What** will be implemented?
- **How** will implementation happen?



Who

Put together your implementation dream team

Having the right people activated and onboarded within your own org will get you the best and quickest implementation results. Tip: Contact any relevant third-party providers

Identify the following teammates within your org and involve them in this process early on:



EXECUTIVE ACCOUNT OWNER

Someone in your org prepared to make high-level business decisions for your CS project.



DEPLOYMENT MANAGER / DEVELOPER

IT personnel ready to deploy JS tags using a TMS or a Dev in charge of hard-coding if you won't be using a TMS.



CONTENTSQUARE POWER USER

Your org's key, future CS user. An analyst who understands your site structure and how data reporting works in your org.

Meet your Contentsquare Implementation Team



Here are your points of contact at Contentsquare during implementation, and how and when to reach them.

IMPLEMENTATION MANAGER (IM)

Your IM will guide your deployment manager/ dev through the technical implementation process. Contact them with any technical questions related to this process.

Your IM will then hand off your CSM after implementation is complete.

CUSTOMER SUCCESS MANAGER (CSM)

Your CSM will be in contact with you during implementation to help set your business goals, explore use cases, and align your initiatives (site redesigns, campaigns, etc.)

You can reach out to your CSM for guidance on these topics throughout your CS contract.

SOLUTIONS EXPERT (SE)

You will meet your SE during implementation and they will begin assessing your unique business needs to prepare you for a seamless and successful onboarding experience.

What

Here is an overview of what you'll implement with our guidance:

| | |
|--|---|
| The Contentsquare Main Tracking Tag | The foundational 'code snippet' implemented on your domain will enable UX analytic data collection. It can be implemented through a Tag Management System (TMS) or on the site's template. One or several scripts will be implemented to collect all types of page views. |
| Ecommerce Tag (Optional) | A code snippet to keep track of ecommerce transactions happening on your site to empower revenue related metrics. It can be implemented using a TMS or hard-coded. |
| Personal Data Masking | You'll identify all areas of your site where users' personal data can be found and <u>mask that data</u> to enable useful Session Replays. |

What

Your technical implementation will be based on your unique site components and business goals

| | |
|--|--|
| Custom Variables, Dynamic Variables, & Custom Page Events | With your Deployment Manager/ Developer consider which variables in your data layer and JS objects you'd like to use or create to enrich your Contentsquare data collection for more robust and relevant analysis. |
| iFrame Tracking | Any iFrame that you'd like to track must also have the same CS tag inside of it as the page hosting the iFrame. |
| Cross-Domain Tracking | If your site users interact with multiple domains within the same session those domains will need to be tracked for later analysis and grouped in the same Contentsquare project. |

How

Here is your implementation timeline...



The more active and involved your Dream Team, the smoother your implementation process will be.

How

Technical Kick Off

You've arrived! This foundational step ensures our mutual alignment of technical requirements needed to solve your business objectives.

Who owns this step? Contentsquare IM and Your Dream Team

Time: One Hour

Base Tagging

We'll guide your team through installing our base tag and, if needed, the ecommerce tag

Who owns this step? Contentsquare IM and Your Dream Team

Time: Varies based on site / implementation method (1-2 hrs for TMS or 6-8 hrs if coding)

Customizing your Implementation

We'll work with you to scope and implement important customizations (ex: Integrations, custom events...) which unlock the power of Contentsquare

Who owns this step? Contentsquare IM and Your Dream Team

Time: Varies based on site / use case

How

QA Testing

We'll conduct a QA test plan that covers your implementation scope to make sure your first exposure to the product is a strong one!

Who owns this step? Contentsquare IM and Your Dream Team

Time: 1 week

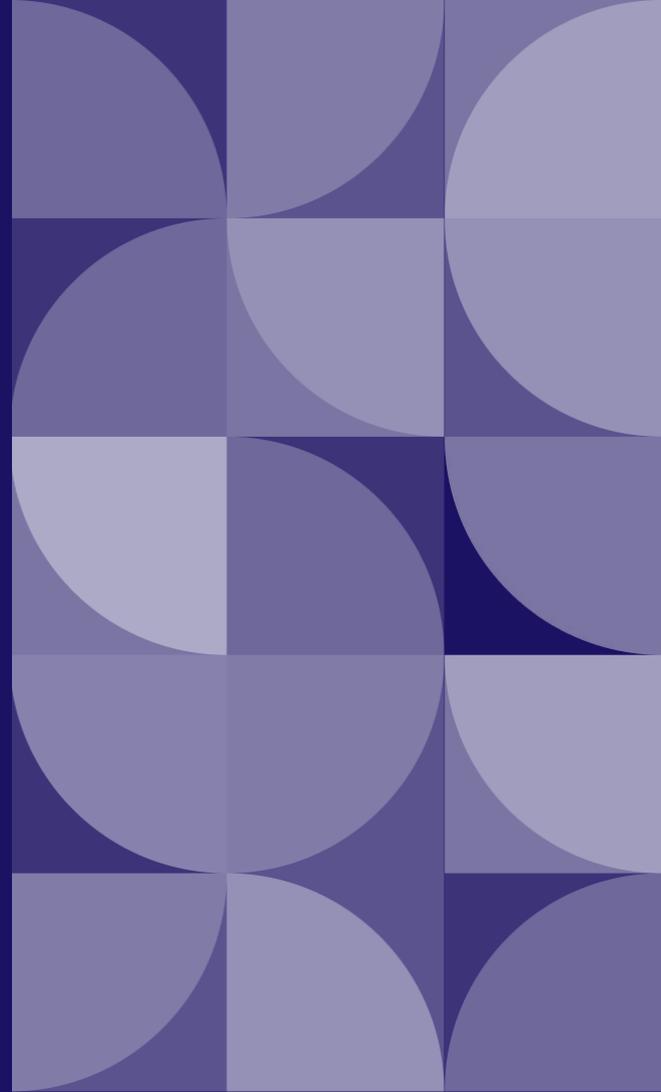
Data Comparison

Let's compare numbers together to make sure that the total number of visits, transactions, and revenue (if relevant) aligns with your analysis objectives.

Who owns this step? Contentsquare IM and Your Dream Team

Time: 1 week

**Learn the key
terms & tools**



Key Terms & Tools

Let's develop a shared language around your Contentsquare implementation



Review and bookmark our [implementation glossary](#).



For more details explore our [technical documentation](#).

Data Layer

A data layer is a layer of your site that contains all of the data that gets generated when users engage with your site.

How does it relate to your Contentsquare project?

Your site's data layer provides a reliable place for the CS tag to collect data as its generated.

Contentsquare Tag (CS Tag)

The CS Tag is a code snippet implemented on your site pages that is used to collect data from your site's data layer. When the tag is loaded, Contentsquare will pick up most interactions happening on the page (e.g. mouseovers, clicks, hovers,...)

How does it relate to your Contentsquare project?

Our implementation team (with the help of your deployment manager) will install the CS Tag on your site to collect UX data to meet your analysis needs.

[Read more about how to deploy our tag](#)

Pageview

A pageview is tracked when a user visits a page on your site where the main CS tag has loaded.

How does it relate to your Contentsquare project?

You'll identify your site pages where you want pageviews tracked and our implementation team will help you install the tag to track them.

Cvars, Dvars, and Custom Page Events

Learn the key differences and use cases to customize your implementation.

| | Custom Variables (Cvars) | Dynamic Variables (Dvars) | Custom Page Events |
|-------------------|--|--|--|
| Definition | <p>Key pairs found in your site's data layer that can be used to track info on a page, user, or session</p> <p>Sent the moment the pageview is sent.</p> <p><i>** You can provide up to 20 Cvars</i></p> | <p>Key-value pairs found in your site's data layer that can be used to track user traffic at a session-level.</p> <p>Sent at a later point, not when the pageview is sent.</p> <p><i>** Up to 40 distinct Dvars per pageview</i></p> | <p>Single value tags found in your site's data layer that can collect info about user events at a session-level.</p> <p><i>** Up to 40 distinct page events per pageview</i></p> |
| Example | <p>Use the Cvar 'page_type' to create a mapping of only your Product pages.</p> | <p>Use the Dvar 'NumberofSearchResults:34' to analyze users who had >20 results on page.</p> | <p>Use the Page Event 'PageShowedSearchResults' to analyze a session where a page showed users' search results.</p> |
| Use Case | <p>Create segments or enriched page group for mappings, where the URL would not be enough.</p> | <p>Create segments to run A/B tests.</p> | <p>View user behavior (interactions with specific elements etc.) in Session Replay or segment users by that same behavior.</p> |

Tools

[Download the Contentsquare Tracking Setup Assistant](#)

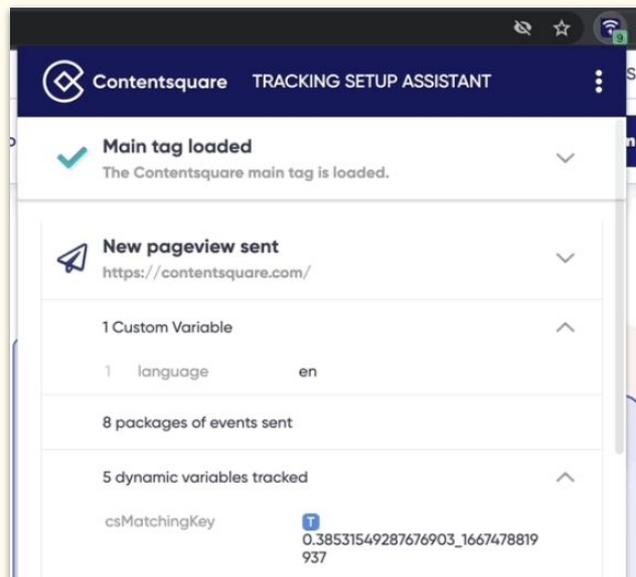
– a Chrome extension you can use to monitor your configuration

What does the setup assistant do?

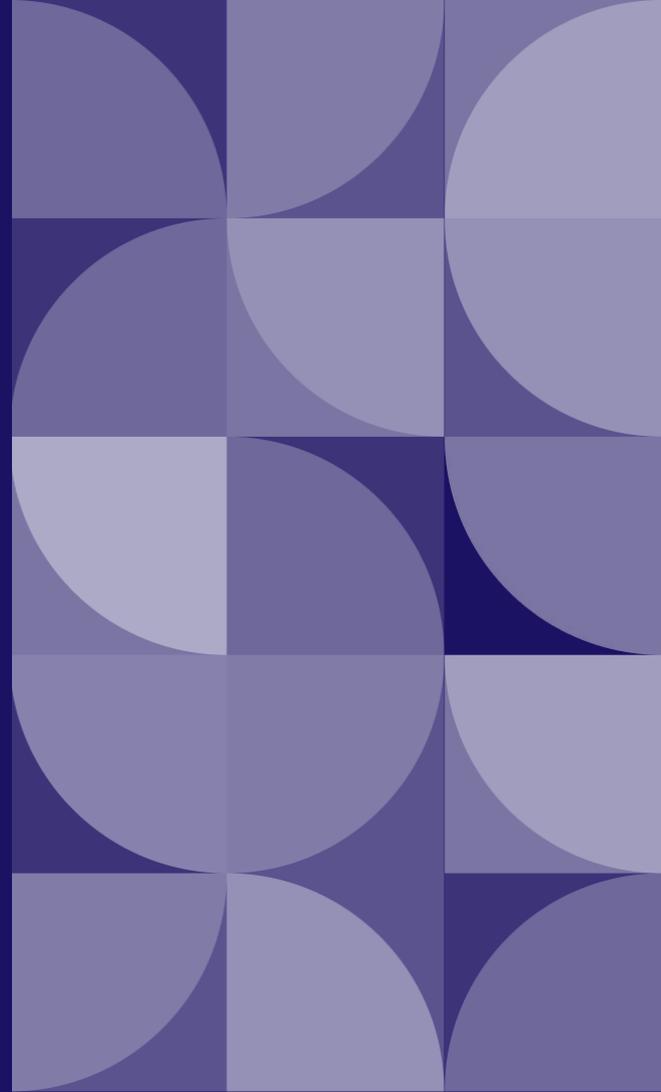
Check the main CS Tag's configuration on your site pages and monitor all pageviews, transactions, custom and dynamic variables sent to Contentsquare.

When should I use it?

After implementation, you will use the extension to troubleshoot anytime your site data is not rendering correctly.



Prepare for Implementation



Choose the right tagging approach

Your IM will help you choose the right tagging approach for your site structure.

Here are a few options to start considering:

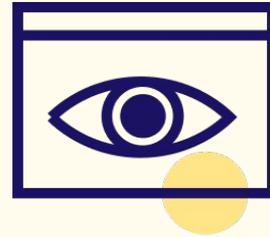
- A **single CS tag** will combine all your data into one single pool for analysis.
- **Multiple separate projects each with its own CS tag** will help you organize and manage data into separate pools for analysis (there is no roll-up option for this tagging approach).
- If you have an ecommerce site, adding our **Ecommerce tag** as a companion to the CS tag will help you track transactions and empowers revenue-related analysis.



Evaluate your site's need for artificial pageviews

Identify tab changes, pop-ups, modals, or iFrames on your site where the navigation does not result in a full refresh of the page

You will need to set up artificial pageviews (APVs) to analyze them as unique pageviews.



Track iFrames to view in Session Replay

Take note of any iFrame(s) on your site that you own, (no third-party iFrames(s)) that you'd like to track, it will need the same CS tag implemented inside of it as the page hosting the iFrame.



Identify personal data

Identify all areas of your site where personal data can be found and block the personal data for useful Session Replays to be enabled in Contentsquare.

The list has to be exhaustive so it is important to set aside time with your technical team to mark each element

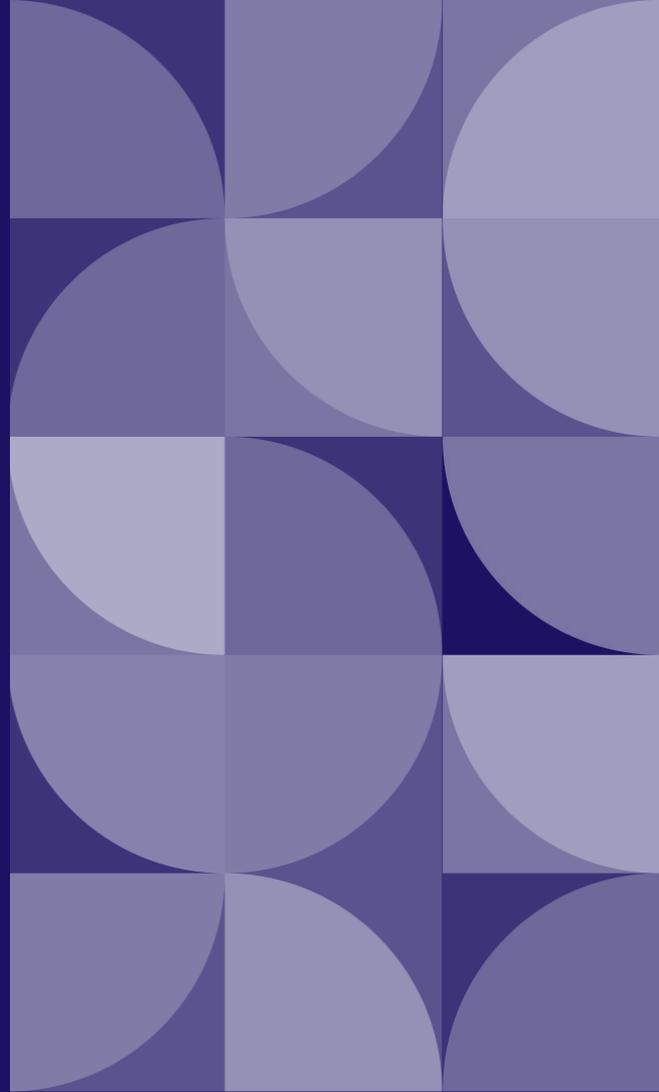
To learn more about Contentsquare methods for masking read this [Help Center article](#).

Reminder: Your site's DOM structure could contain personal data either in the text or in DOM attributes, text entry fields aren't captured.



Your site's form pages (shipping address fields, billing information, etc.) will automatically be masked.

**Start using
Contentsquare**



Your Implementation Extras

After implementation is complete, your CS project(s) will be fully equipped with the following items:

- ❑ A mapping of your site(s)
- ❑ User segments ready to analyze
- ❑ Integrations and third party tools enabled
- ❑ User accounts for you and your team





Contentsquare

More. Human. Analytics.



You are ready for implementation!



Thank you