SITECORE®

Premier Assure Activities guide

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November 2023

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Overview

The Premier Assure offering is designed for customers and partners who are technically capable of implementing and developing their target solution and roadmap but want oversight of their work by experienced Sitecore professionals.

Premier Assure is provided in the form of Activities. The Activities vary in complexity and duration. As such, Activities require a different number of Activity Points to complete. The number of Activity Points in your package is noted in your order form. Activity Points can be used individually or combined for use in a larger Activity.
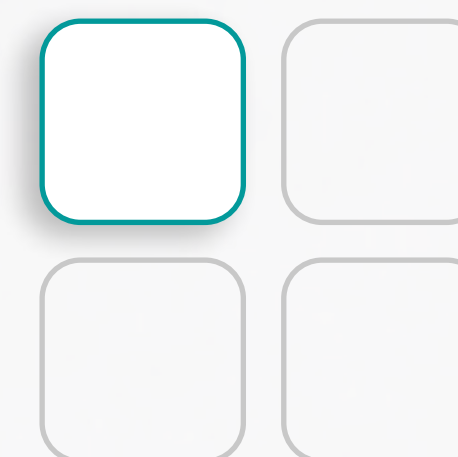
Activity Points can be used individually
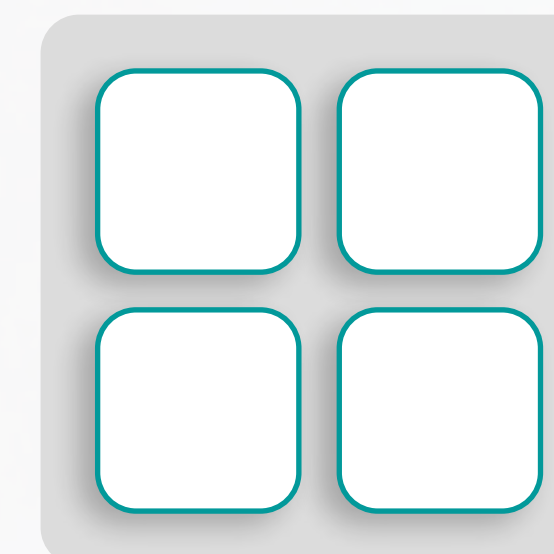
Or combined for large Activities

Activities for all products

2-hour review session (AP1)

You may have completed work that is not covered by any of the review Activities listed here. This Activity is a face-to-face video call of up to 2 hours where you can talk directly with a Sitecore services team member regarding any piece of work you have completed or that is near completion. All Services team roles are available. One person from the Services team will participate in the session.

| Size	(1) Activity Point
Type	Briefing
Tasks	A member of the Sitecore team will: • Attend a call with members of your team so they can present content for discussion • Review the content and provide expert feedback and advice • Note that the task is limited to discussion on a call (there is no pre-work or post-work, only items that can be discussed over a call are suitable for this Activity)
Prerequisites	Before the Activity begins, you must: • Share a list of specific questions or artefacts you wish to discuss during the session. If the questions can't be answered, we will make you aware. • Prepare any supporting material that will be used during the session so that time is used efficiently
Deliverables	We provide the following deliverable: • Feedback and advice on your work
Guidelines	This activity can be combined into larger sessions if needed. For example, a 4-hour review session can be conducted by combining two 2-hour sessions.

Consultant assistance (AP2)

You may require help with a topic or issue not covered by the Activities listed here. Through this Activity, Sitecore will provide your team and implementation partner with feedback and recommendations to assist with your topic of interest or issue. This Activity provides remote consulting hours to assist with guidance, best practices and quality assurance.

Additional activities may include independent research or prototyping to address your technical questions. The Activity is not restricted to technical topics but can also take advantage of Business Consultants for Business Optimization.

The hours must be used within the Sitecore360 quarter (i.e. cannot be carried over to the following Sitecore360 quarter). Please allow a lead time of up to 2 weeks for resourcing.

Size	2 Hours Per Point (5 Point Minimum)
Type	Evaluation
Tasks	A member of the Sitecore team will: • Review the topics that you need help with and ask any clarifying questions • Perform research & investigation and provide feedback via email • Attend calls as needed
Prerequisites	Before the Activity begins, you must: • Share a list of topics you want Sitecore to research & investigate (NOTE: your Client Manager will notify you if the topics need to be split into separate Activities) • Prepare any supporting material that should be taken into consideration by the Sitecore team
Deliverables	There are no pre-defined deliverables for this Activity. Rather, the Sitecore consultant will provide as much assistance as possible on your topic of interest or your issue in the time allowed.
Guidelines	Note that the consultant assigned is not a dedicated person, so although we will make every effort to work to your timelines, there may be occasions where the consultant is not immediately available for a call. You will need to work with the consultant to schedule any calls. If there is no engagement for 4+ weeks, the consultant may be reassigned to other tasks and there may be a delay in reassigning the consultant or a different consultant may be assigned. There is no guarantee that any specific task will be completed with the allocated number of Points. However, our team will do their best to provide an accurate estimate before the work starts given the information provided. Once work is underway, should we believe additional points are needed, Sitecore will communicate that to the Customer and Sitecore and the Customer will collaborate to discuss and allocate for any additional points needed.
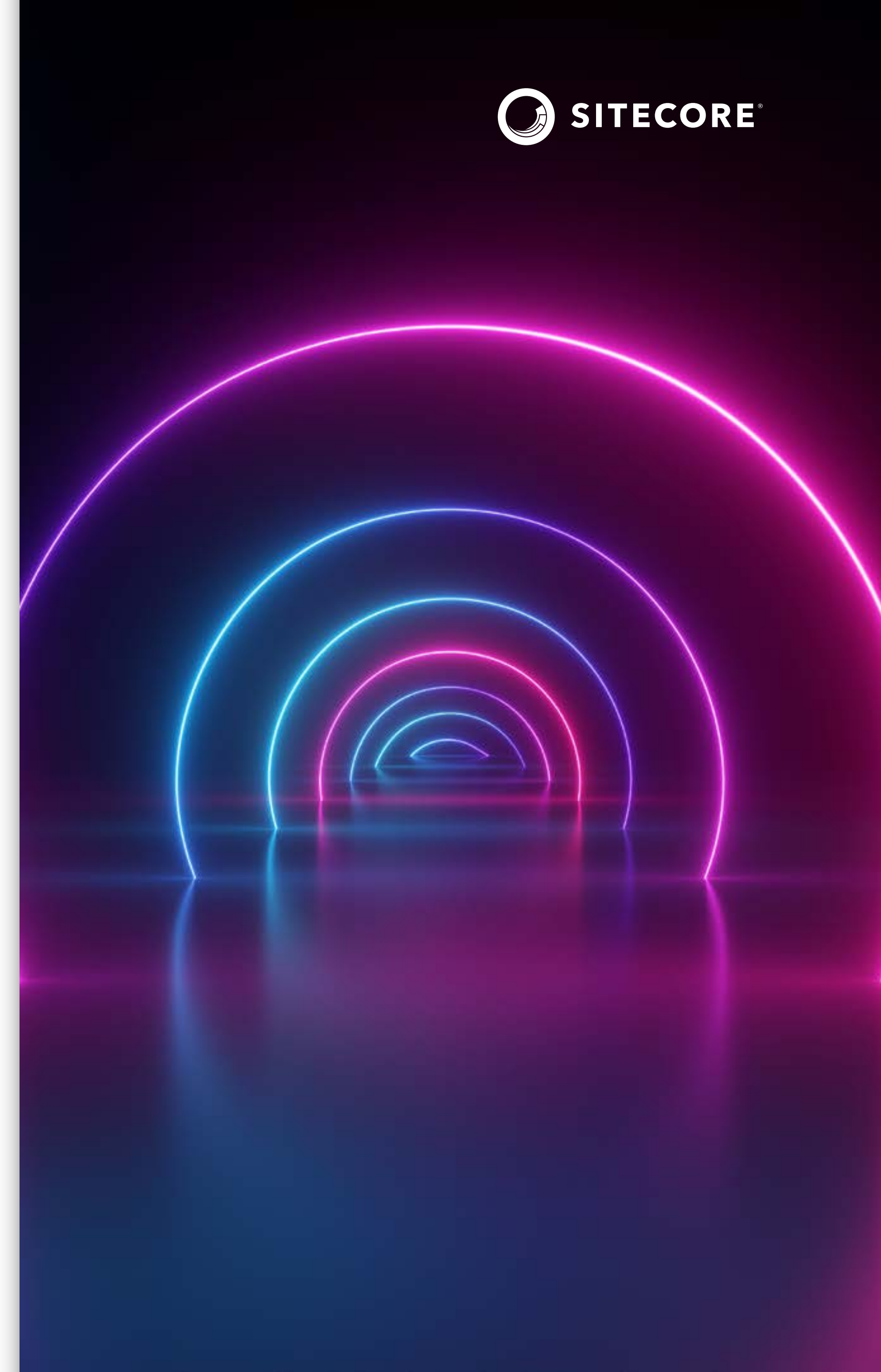
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Activities for Sitecore® Content Hub™

User groups and permissions review (CH2)

This Activity is designed to help you set up Sitecore Content Hub user groups and permissions correctly and according to best practices.

Size	(3) Activity Points
Type	Review
Tasks	The Sitecore team will: • Review existing groups and permissions • Advise on best practices regarding groups and permissions • Suggest improvements on group and permissions setup for overall maintainability • Report on group and permissions and patterns
Prerequisites	Before the Activity begins, you must: • Provide access to a production-like environment which includes the groups and permissions to be reviewed • Provide documentation (analysis document or business requirements) detailing current groups and permission setup including SSO configuration details
Deliverables	We provide the following deliverables: • Consulting on best practices • A report with findings, suggestions for improvement, and suggested next steps to include expected impact • A 1-hour call to review the report
Guidelines	• User Groups must be set up in the system before this Activity can be performed. • Applicable Content Hub modules: All

Recommended practices review (CH3)

In this Activity, we perform a thorough review of your Content Hub implementation and provide feedback on best practices.

Size	(10) Activity Points
Type	Review
Tasks	A member of the Sitecore team will review the current implementation on best practices on the following topics: • Domain mode • Triggers • Security setup • External page components • Taxonomy setup • Custom integrations • Scripting • Visual Studio Solution setup
Prerequisites	Before the Activity begins, you must: • Provide access to a production-like environment • Provide a list of custom integrations • Provide any existing documentation
Deliverables	We provide the following deliverables: • A report with findings, suggestions for improvement, and suggested next steps • A 1-hour call to review the report
Guidelines	Use of the security setup review and reliance thereon is at user's sole risk. The security setup review is provided on an "as is" basis. Sitecore makes no warranty of any kind whether express or implied, statutory or otherwise, including without limitation as to the results to be obtained from the use of the security setup review, that the security setup review will be error-free, complete or accurate, any implied warranty of merchantability, fitness for a particular purpose, title, infringement, or otherwise. Neither Sitecore nor its affiliates nor subsidiaries will in any way be liable to user or any other entity or person for any inaccuracies, errors, omissions, delays, computer viruses, security breaches, or other damages (whether direct or indirect), claims, abilities or losses, regardless of cause, in or arising from the use of the security setup reuse of the security setup review and reliance thereon is at user's sole risk. The security setup review is provided on an "as is" basis. Sitecore makes no warranty of any kind whether express or implied, statutory or otherwise, including without limitation as to the results to be obtained from the use of the security setup review, that the security setup review will be error-free, complete or accurate, any implied warranty of merchantability, fitness for a particular purpose, title, infringement, or otherwise. Neither Sitecore nor its affiliates nor subsidiaries will in any way be liable to user or any other entity or person for any inaccuracies, errors, omissions, delays, computer viruses, security breaches, or other damages (whether direct or indirect), claims, abilities or losses, regardless of cause, in or arising from the use of the security setup review.

Domain model assistance and validation (CH5)

This Activity provides guidance on building your domain model. Getting this right at the beginning will eliminate headaches and frustration at later stages.

Size	(6) Activity Points
Type	Workshop
Tasks	A member of the Sitecore team will: • Attend a kick-off call and share domain model templates • Assist you in shaping and filling these templates • Review the domain model
Prerequisites	Before the Activity begins, you must: • Make sure that at least 1 user with Content Hub Admin certification is available to participate • Come to session prepared with draft version of domain model
Deliverables	We provide the following deliverables: • A 2-hour call to walkthrough your initial draft domain model • Domain model templates • Remote assistance in completing the domain model templates • A 1-hour call to review your final domain model configuration
Guidelines	• This Activity must be performed pre-implementation. • Applicable Content Hub modules: DAM/PCM, CMP

Sitecore Digital Asset Management (DAM) Connector usability review (CH7)

This Activity helps you optimize Content Hub entity definition and page setup to meet the needs of Sitecore Experience Manager/Experience Platform users when a Sitecore DAM Connector is in place.

Size	(4) Activity Points
Type	Optimization
Tasks	A member of the Sitecore team will: • Assist client with Azure Service Bus and DAM connector set-up • Review the existing M.Asset entity definition • Suggest further improvements of the definition, i.e., additional metadata for web assets • Review the Sitecore DAM Connector search page setup • Suggest improvements to the search page, i.e., customizing the search setup for web assets
Prerequisites	Before the Activity begins, you must: • Set up Azure Service Bus on the client side • Provide documentation on the existing M.Asset entity definition or access to Content Hub • Provide documentation on the existing Sitecore DAM Connector page setup or access to Content Hub
Deliverables	We provide the following deliverables: • A 2-hour call to discuss and review your connector configuration as well as provide advice on improvements
Guidelines	• This Activity must be performed post-implementation (Experience Platform/Experience Manager and Content Hub must be implemented) • Applicable Content Hub modules: DAM, CMP

User groups and permissions definition assistance (CH1)

User groups and permissions are at the core of securing content and user actions within Content Hub. It is important that permissions and rules are implemented in a way that is sustainable for the administration of Sitecore Content Hub as well as for the growth of the tool within individual business organizations. Getting a good baseline is important to ensure success in this areas. This Activity is designed to help you plan and organize user groups ahead of implementing them within Sitecore Content Hub.

Size	(12) Activity Points
Type	Workshop
Tasks	A member of the Sitecore team will: • Attend a remote session and share a user group set-up template • Advise on filling in the template • Review the completed template for final thoughts and guidance
Prerequisites	Before the Activity begins, you must: • Make sure that at least 1 user with Content Hub Admin certification is available to participate. • Provide a listing of proposed user groups or user personas covering all initial known areas of access into Content Hub
Deliverables	We provide the following deliverables: • A 2-hour call to review your proposed initial user group and permissions details • User group set-up template • Remote assistance in completing the user group set-up template • A 1-hour call to review client's final user group configuration
Guidelines	• This Activity must be performed pre-implementation • Applicable Content Hub modules: All

Content Hub user experience review (CH4)

Sitecore Content Hub allows administrators to implement many features and functions that can greatly enhance the user experience within their business's Content Hub implementation. This Activity is designed to help you ensure you are getting the most out of your Content Hub implementation. Whether it is ensuring your company's brand guidelines are being met in the tool, that you have tooltips help text to help guide your users, or that you are leveraging annotations and discussions for better collaboration, this review will help provide guidance on other areas of the tool that can add value to the user experience.

Size	(3) Activity Points
Type	Optimization
Tasks	A member of the Sitecore team will: • Review the current implementation related to user experience, touching on areas including: themes, email templates, user notifications, help text, annotations, collections, etc... • Provide feedback based on the result
Prerequisites	Before the Activity begins, you must: • Provide access to a production-like environment
Deliverables	We provide the following deliverables: • A report with findings, suggestions for improvement, and suggested next steps • A 1-hour call to review the report
Guidelines	• This Activity must be performed post-implementation • Applicable Content Hub modules: All

Domain model review (CH6)

This Activity provides guidance on building your domain model. Getting this right at the beginning will eliminate headaches and frustration at later stages. This Activity differs from the assistance and validation Activity in that the domain model must already be defined. This is a review of the work done to offer suggestions for improvement.

Size	(3) Activity Points
Type	Review
Tasks	The Sitecore team will: • Review the domain model and suggest improvements
Prerequisites	Before the activity begins, you must: • Make sure that at least 1 user with Content Hub Admin certification is available to participate • Make sure your domain model is fully fleshed out • Grant administrator access to the Content Hub instance that needs to be reviewed
Deliverables	We provide the following deliverables: • Consulting on best practices • A report with findings, suggestions for improvement, and suggested next steps
Guidelines	• This Activity must be performed post-implementation (domain model requirements should be finalized) • Applicable Content Hub modules: DAM/PCM, CMP

Content Hub stateflow assistance (CH8)

Workflows within Sitecore Content Hub allow us to model business processes which can better organize and streamline activities within the implementation. This Activity is designed to help you plan your organization's usage of stateflows ahead of implementing them within Sitecore Content Hub.

Size	(6) Activity Points
Type	Workshop
Tasks	A member of the Sitecore team will: • Attend a remote session to discuss and advise on plans for implementing stateflows
Prerequisites	Before the activity begins, you must: • Make sure that at least 1 user with Content Hub Admin certification is available to participate • Provide a listing of proposed workflows to include listing of expected stakeholders
Deliverables	We provide the following deliverables: • A 2-hour call to review your proposed initial workflows and business processes • Advice and consulting on completing the workflow configuration
Guidelines	• This Activity must be performed pre-implementation • Client must choose 1 module per work session, i.e. not all modules can be covered in one session/activity • Applicable Content Hub modules: DAM/PCM*, CMP, MRM

Content Hub stateflow review (CH9)

Workflows within Sitecore Content Hub allow us to model business processes which can better organize and streamline activities within the implementation. This Activity differs from the assistance Activity in that the business specific stateflows must be defined already. This is a review of the work done to offer suggestions for improvement.

Size	(3) Activity Points
Type	Review
Tasks	The Sitecore team will: • Review the stateflows and suggest improvements
Prerequisites	Before the activity begins, you must: • Make sure that at least 1 user with Content Hub Admin certification is available to participate • Provide access to a production-like environment
Deliverables	We provide the following deliverables: • Consulting on best practices • A report with findings, suggestions for improvement, and suggested next steps • A 1-hour call to review the report
Guidelines	• This Activity must be performed post-implementation (stateflows should be fully fleshed out by client/partner) • Client must choose 1 module per work session, i.e. not all modules can be covered in one session/activity • Applicable Content Hub Modules: DAM/PCM*, CMP, MRM

Data migration advice (CH10)

Sitecore Content Hub is nothing without the content. Most organizations have a repository of content, whether it be within a file system or other digital application. Getting the content and metadata into Content Hub is a key step in the delivery of a Content Hub implementation. This Activity provides guidance on migration approach taking into account business constraints and best practices.

Size	(10) Activity Points
Type	Workshop
Tasks	A member of the Sitecore team will: • Attend a remote session to discuss and advise on plans for data migration • Help answer questions during preparation and testing of migration process
Prerequisites	Before the activity begins, you must: • Make sure that at least 1 user with Content Hub Admin certification is available to participate • Prepare a listing of data sources, formats, volume, and types of data • Domain model must be finalized for implementation
Deliverables	We provide the following deliverables: • A 2-hour call to review your approach to data migration, as well as to provide advice and consulting on your migration process
Guidelines	• This Activity must be performed pre-implementation • Applicable Content Hub modules: DAM/PCM

MRM projects setup and best practices (CH11)

Working session to review requirements and provide guidance on the best usage of MRM.

Size	(3) Activity Points
Type	Workshop
Tasks	A member of the Sitecore team will: • Attend a remote session to discuss client's business requirements related to MRM and review any existing domain model/schema set-up
Prerequisites	Before the activity begins, you must: • Make sure that at least 1 user with Content Hub Admin certification is available to participate • Provide business requirements and workflows for MRM (including any integrations) to Sitecore ahead of time
Deliverables	We provide the following deliverables: • A 2-hour call to review your proposed schema and business processes related to MRM, as well as to provide advice and consulting on completing the MRM configuration
Guidelines	This Activity must be performed pre-implementation Topic can include: • Workshop to explain common use cases based on historic client implementations e.g. whether to go with single stage, multi stage, simple tasks or applying stateflows for the workflows in scope. • How the user roles need to be adapted • How re-useable templates can be created • How appropriate identifiers can be applied to indicate assets coming from Project space vs DAM Applicable Content Hub modules: MRM

Deployments and change management overview (CH12)

Like all good implementations, taking proper care of the configurations changes between environments is key to ensuring a stable system. The intent of this Activity is to give an overview on how to successfully plan and manage deployments and change management for your Content Hub implementation.

Size	(1) Activity Point
Type	Workshop
Tasks	A member of the Sitecore team will: • Attend a remote session to review how to plan and perform import/exports between environments in Content Hub
Prerequisites	Before the activity begins, you must: • Ensure a member of your team has taken both Content Hub User and Admin trainings
Deliverables	We provide the following deliverables: • A 2-hour call to discuss and advise on your approach to deployments and change management
Guidelines	• This Activity must be performed pre-implementation • Applicable Content Hub modules: PCM

PCM – Product content management setup (CH13)

Working session to understand the requirements and provide guidance on how different levels of Product hierarchy can be established and what their relationships with other entities should be.

Size	(2) Activity Points
Type	Workshop
Tasks	A member of the Sitecore team will: • Attend a remote session to discuss client's business requirements related to Products and review any existing domain model/schema set-up
Prerequisites	Before the activity begins, you must: • Ensure a member of your team has taken both Content Hub User and Admin trainings. • Provides business requirements for Product (including any integrations), as well as draft schema to Sitecore, ahead of time
Deliverables	We provide the following deliverables: • A 2-hour call to review your proposed schema and business processes related to PCM, as well as to advise and consul on completing the PCM configuration
Guidelines	• This Activity must be performed pre-implementation • Applicable Content Hub modules: PCM

Azure function overview and assistance (CH14)

Often Content Hub users need specifically timed actions to occur. To accomplish this in Content Hub, Azure Functions must be implemented. The purpose of this session is to review functional requirements with client/partner to determine if Azure Functions are necessary and advise you on the best ways to set-up and implement.

Size	(1) Activity Point
Type	Workshop
Tasks	A member of the Sitecore team will: • Attend a remote session to discuss your business requirements related to timed functions and provide advise on setting up Azure Functions
Prerequisites	Before the activity begins, you must: • Ensure a member of your team has taken both Content Hub User and Admin trainings • Provide business requirements ahead of time • Have an established Azure subscription
Deliverables	We provide the following deliverables: • A 1-hour call to review your business requirements with regard to Azure functions, and provide advice and consulting
Guidelines	• This Activity must be performed pre-implementation • Applicable Content Hub modules: All

Single Sign-On (SSO) overview and assistance (CH15)

Content Hub customers have the option to use SSO (single sign-on) for user authentication within Content Hub. Setting up the authentication and determining if any security mapping scripts are needed is an important step to ensuring best practices and manageability of users.

Size	(1) Activity Point
Type	Workshop
Tasks	A member of the Sitecore team will: • Attend a remote session to discuss your business requirements related to SSO and security mappings
Prerequisites	Before the activity begins, you must: • Ensure a member of your team has taken both Content Hub User and Admin trainings. • Provide security requirements (e.g. SSO provider) ahead of time
Deliverables	We provide the following deliverables: • A 1-hour call to review your approach to user security, and provide advice and consulting
Guidelines	• This Activity must be performed pre-implementation • Applicable Content Hub modules: All

Intro to Sitecore Content Hub (CH16)

This activity offers an overview of the Content Hub DAM, core concepts, asset workflow and a brief overview of its available modules. Presentation followed by a demonstration of how to perform day to day tasks on a sample Content Hub instance.

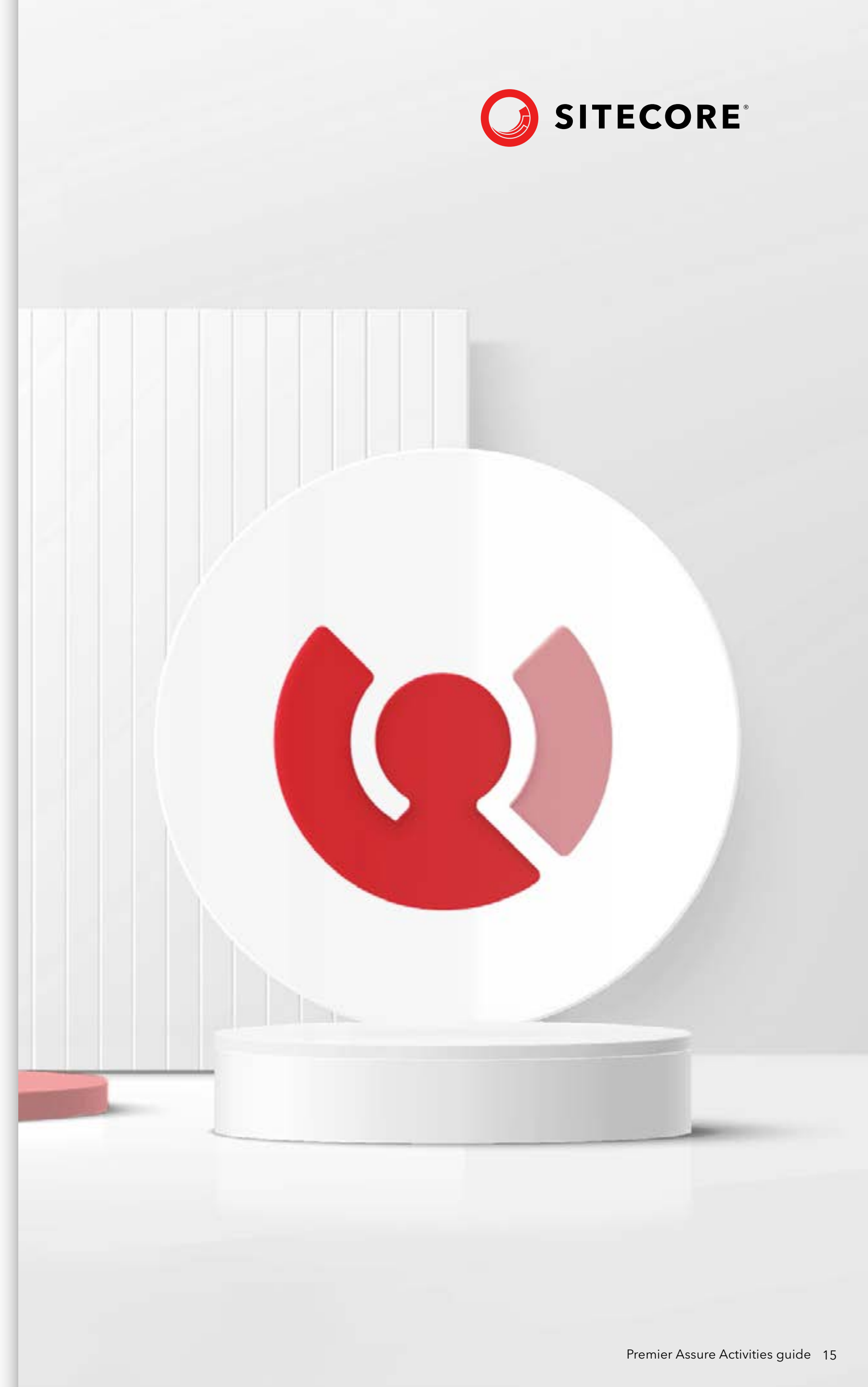| Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Prepare and deliver the workshop
Prerequisites	None
Deliverables	We provide the following deliverables: • A call of up to 2 hours to go through the basics of Content Hub DAM, including a demo
Guidelines	• This Activity is ideally performed pre-implementation but can be useful for any user who generically wants to be introduced to Content Hub DAM • Applicable Content Hub Modules: DAM

Activities for Sitecore® Customer Data Platform (CDP)

Web tagging review (CDP1)

There are many ways to capture data from your web channel with the CDP Stream API. Your website layout, the data that is available, and what you want to do with that data all influence how you should capture your web behavioral data. In this Activity, we thoroughly review your implementation and highlight any issues and potential improvements.

Size	(4) Activity Points
Type	Review
Tasks	The Sitecore team will: • Interact with your website to complete typical customer actions and check that customer data is captured as expected • Ensure that Identity events result in customer profiles merging as expected • Check for incoming data that is malformed or missing • Check duplication of data or events • Check performance (timing) of library loading and execution of library functions • Check for timing issues when making data available to the tags • Check for potential issues related to session or event limits
Prerequisites	Before the Activity begins, you must: • Provide a statement describing your web behavioral data capture goals • Fully deploy and test the data capture tags on your website • Share the tags and configuration with the Sitecore team • Grant access to the user acceptance testing (UAT/staging website, if the Activity is being performed on that website) • Grant access to Sitecore CDP
Deliverables	We provide the following deliverables: • A list of the checks performed, a Red/Amber/Green status, and a comment (if status is Red or Amber) • A second iteration of the document that addresses your questions or comments
Guidelines	• This Activity covers a single website only • It can be performed on either a UAT/staging or production website

Offline feed integration review (CDP2)

Offline feed integrations, where you take data from your internal systems and feed it periodically – usually daily – into the Sitecore CDP can be complex. This data is often crucial to your operations and must be captured accurately. In this Activity, we check the data feeds you have configured, making sure that profiles are being merged, created, updated, and deleted as expected.

Size	(4) Activity Points (for a single system integration) (8) Activity Points (for more than one system integration, where the data from those systems is the same)
Type	Review
Tasks	The Sitecore team will: • Assess the content of the batch files you use for your offline feed(s) for correct and optimal formatting • Import batch files into the UAT environment to observe profile creation, merging, updating, and deletion • Review the format and content of data extensions
Prerequisites	Before the Activity begins, you must: • Provide a statement describing the system(s) you have integrated with the CDP, a summary of the data sent by those systems, and the reason for the integration • Have completed integration(s) on UAT with all planned system(s) that send batches of data into the CDP Batch API • Have tested that profile creation in the CDP is as expected • Have tested that profile merging in the CDP is as expected • Have tested that profile updating in the CDP is as expected • Have tested that profile deletion in the CDP is as expected • Have configured and tested at least one data extension • Provide samples of the test data with personal identifiable information data obfuscated • Grant access to Sitecore CDP (UAT)
Deliverables	We provide the following deliverables: • A document listing all the checks performed, a Red/Amber/Green status, and a comment (if status is Red or Amber) • A second iteration of the document that addresses your questions or comments
Guidelines	• The Activity must be performed on your Sitecore Personalize environment. • Each integration with systems that contain different data is considered a large Activity. In cases where the same data comes from multiple systems, there is some efficiency in doing these together as an extra-large Activity

Identity rules review (CDP3)

An identity rule is used to determine the information that uniquely identifies an individual and to allow profiles with the same information to be merged. Identity rules can be complex, with the most reliable or important rules at the top of the hierarchy. In this Activity, we assess your identity rules and how identifying information is gathered, looking for common corner cases that cause unexpected behavior.

Size	(2) Activity Points
Type	Review
Tasks	The Sitecore team will: • Run various scenarios to ensure that your hierarchy of rules is behaving as expected • Analyze the sources of identifying information • Note any areas where identity rules may not behave as expected (e.g., race conditions when identifying information that comes from different sources)
Prerequisites	Before the Activity begins, you must: • Have fully configured identity rules and data capture • Provide a statement describing the expected behavior of your rules • Provide details of all systems and channels that will use the identifiers to upload data into CDP profiles • Grant access to the Sitecore CDP Production environment
Deliverables	We provide the following deliverables: • A short document describing the observed behavior of the identity rules, as well as recommendations on how to resolve any issues found. • A second iteration of the document that addresses your questions or comments
Guidelines	This Activity covers a single set of Identity rules only

Mobile/non-web stream integration review (CDP4)

Sitecore Customer Data Platform (CDP) can ingest real-time data from any source via the Stream API. Ingesting that data from multiple sources creates complexity around merging and usage of that data and there may be situations where necessary data is not being captured. In this Activity, we thoroughly assess the data you are capturing across your channels, highlighting any issues and potential improvements.

Size	(4) Activity Points
Type	Review
Tasks	The Sitecore team will: • Interact with your channels to complete typical customer actions and check that the customer data is captured as expected • Ensure that Identity events result in customer profiles merging as expected • Check for incoming data that is malformed or missing • Check duplication of data or events • Check performance (timing) of library loading and execution of library functions (if applicable to that channel) • Check for potential issues related to session or event limits
Prerequisites	Before the Activity begins, you must: • Provide a statement describing your web behavioral data capture goals • Fully deploy the data capture functionality to the channels being reviewed and test it • Grant remote access to the channels to allow the reviewer to interact with them, including login and purchase/ordering details where necessary • Grant access to Sitecore CDP (UAT or Production)
Deliverables	We provide the following deliverables: • A document listing all the checks performed, a Red/Amber/Green status, and a comment (if status is Red or Amber) • A second iteration of the document that addresses your questions or comments
Guidelines	This Activity can be performed in either the UAT or production environment. It is for a single app (server-side) integration review only.

Sitecore CDP: Identity resolution rule review/changes (CDP5)

An identity rule is used to decide what piece or pieces of identifying information uniquely define an individual and allows profiles with the same identifying information to be merged. Identity rules can be complex. Most often, a hierarchy of rules is used, with the most reliable or important rules at the top.

In this Activity, we assess your identity rules and how identifying information is gathered, seeking out common corner cases that cause unexpected behavior.

If you must change identity rules, we analyze the proposal and check its feasibility with all the data provided to us. If feasible, we update the rules in UAT and extensively test and document all ingestion channels (Stream, REST, and batch APIs) for the new identity rule configuration. We also ensure that any downstream systems still work with new identifiers.

Size	(4) Activity Points for 2 rule changes (8) Activity Points for 3+ rule changes
Type	Optimization
Tasks	The Sitecore team will: • Analyze the proposal of new rules and check their feasibility • Test and document rule behavior on all ingestion channels (Stream, REST, and batch APIs) in UAT
Prerequisites	Before the Activity begins, you must: • Fully configure identity rules and data capture in UAT • Provide a statement describing the expected behavior of the new identity rule configuration • Provide details of all systems and channels that will use the identifiers to upload data into CDP profiles • Grant access to the Sitecore CDP UAT and production environment • Provide details of identifiers available in all existing systems and channels and newly proposed channels that upload data into CDP • Provide details of downstream systems and APIs that require identifiers to work
Deliverables	We provide the following deliverables: • A decision on whether updates to rules can be achieved safely • A document describing all scenarios tested for uploading to the Sitecore CDP with new identity rules
Guidelines	N/A

Data extension validation (CDP6)

Beyond the core data fields in the Sitecore CDP data model, you can use data extension to send the name/value pairs you want to CDP. There is a recommended structure for using data extensions to ensure best usability and performance within CDP and Sitecore Personalize.

In this Activity, we review all existing data extensions to ensure the use of best practices so that you are not limited in your use of CDP and Personalize. If you want to add fields, we also recommend how best to structure and include them.

Size	(2) Activity Points
Type	Evaluation
Tasks	The Sitecore team will review existing data extensions behavior in the platform for the following: • ACDP profiles • Segmentation • Sitecore CDP Data Lake Export • Decision Models and Experiences (For Personalize)
Prerequisites	Before the Activity begins, you must: • Fully configure batch uploads • Grant access to the Sitecore CDP UAT and production environment • Provide a list of all existing data extensions and their data types • Provide a list of new data extensions you want to include
Deliverables	We provide the following deliverable: • A short document that verifies existing data extensions work as expected across the platform, along with recommendations for any cleanup or structural changes to optimize usability and performance
Guidelines	N/A

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Batch segmentation best practices (CDP7)

You may have built some Segments in Sitecore CDP or your team could be new to building Batch Segments. In both situations, increasing your knowledge and confidence in using this tool is a great step in using the CDP to its full potential. In this activity, we will deliver a best practice workshop for Batch Segmentation (excluding Advanced Mode) reviewing the different ways to consider your audience, build segments, calculate audience size, etc.

Size	(1) Activity Point
Type	Optimization
Tasks	The Sitecore team will: • Prepare material for the workshop and deliver the workshop
Prerequisites	Before the Activity begins, you must: • Provide a list of the people attending the call • Provide information on who the audience will be (this activity is for non-technological team members)
Deliverables	We provide the following deliverables: • Best practices workshop • Documentation from workshop • Video recording for playback if required
Guidelines	None
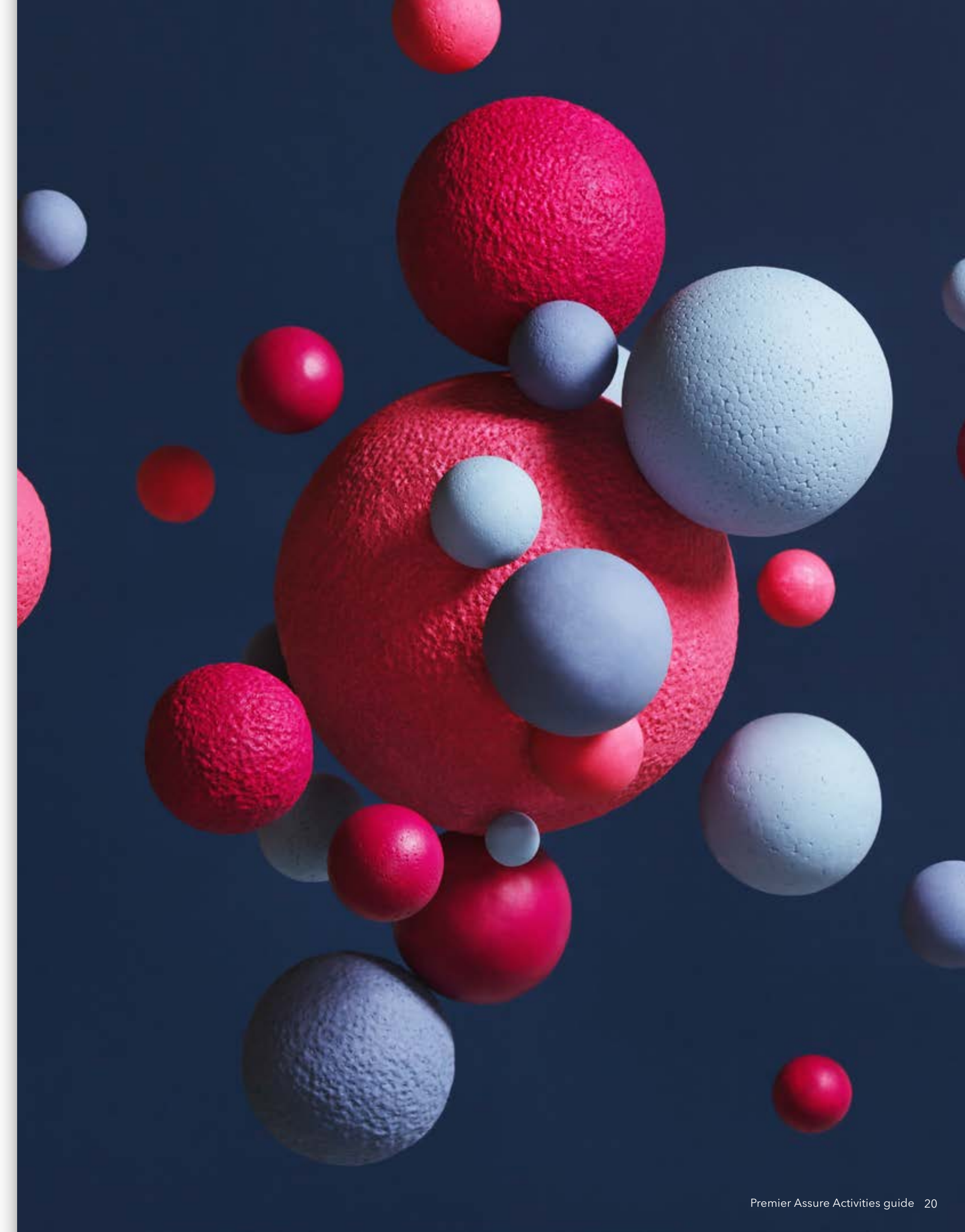
Ideation – How best to communicate to customers using your data (CDP8)

Sitecore CDP may be full of your customer data but you may be unsure where to start in reaching out and targeting your customers. In this activity, we will brainstorm ideas on use cases to communicate with your customers using your CDP data.

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Prepare material for the workshop and deliver the workshop
Prerequisites	Before the activity begins, you must: • Provide a list of the people attending the call so they can be invited to the Miro Ideation Board • Review the Pre read provided ahead of the activity
Deliverables	We provide the following deliverables: • Ideation workshop (1-hour minimum via video call) • Pre-read for workshop • Video recording for playback if required
Guidelines	None

Customer journey timeline (CDP9)

When interacting with a brand, a customer goes through a journey from first touch to repeat interactions. This experience should be reviewed and modified over time as customer behavior can change. This activity looks at how we provide the right messaging to the right customers at the right time. by understanding the brand's Customer Journey Timeline and reviewing potential gaps in experience. This activity can be repeated periodically to understand where there may be gaps due to any new channels, additional engagement points, or changes in customer behaviors.

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Prepare material for the workshop and deliver the workshop
Prerequisites	Before the activity begins, you must: • Provide a list of the people attending the call so they can be invited to the Miro Ideation Board • Review the Pre read provided ahead of the activity
Deliverables	We provide the following deliverables: • Customer journey timeline workshop (1-hour minimum via video call) • Pre-read for workshop • Video recording for playback if required
Guidelines	None

Offline feed – Data design workshop (CDP10)

In this activity, the Sitecore team will help you to map your data to the CDP data model before setting up an offline feed. This will ensure that the data is well structured for future use cases and easily available to future users. The Sitecore team will get to know your data and potential future use cases at a high level. They will then advise on how best to map the data for the given purpose and also share some common pitfalls and how to avoid them.

Size	Guest data: (2) Activity Points Order data: (3) Activity Points
Type	Workshop
Tasks	The Sitecore team will: • Discuss and advise on high level approach for Guest attributes, Data Extensions and Order Items where appropriate • Provide best practice guidance to be aware of, why it exists, and how it might be applied in your particular case
Prerequisites	Before the activity begins, you must: • Provide a list of people attending the call • Provide any areas of interest outside of the main agenda, and also any agenda items that should be skipped • Provide a short description of the data for upload (sample data encouraged) and how it is intended to be used in upcoming use cases (Personalized email campaigns/Audience filtering for real-time personalized content etc.)
Deliverables	We provide the following deliverables: • Sample upload starter code • Data Design workshop (1-hour minimum via video call) • Follow up documentation links for further detail on items discussed • Video recording for playback
Guidelines	None

Data lake export – Technical integration set up (CDP11)

In this activity, the Sitecore team will help you set up your periodic export of the CDP's data set for use in external analytics systems. We will discuss questions such as:

• How do we verify that the AWS role has the necessary access?
• What are the options for replicating this into our own data store?
• How often should we replicate the data to our own systems?
• Which data files should we replicate?

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Consider a customer's specific needs and technical configuration • Provide guidance on how to complete the setup of an automated Data Lake Export from the CDP via an interactive workshop
Prerequisites	Before the activity begins, you must: • Provide a list of people attending the call • Provide a short description of your goals, data destination, and any technical limitations you may be aware of
Deliverables	We provide the following deliverables: • Data Export workshop (1-hour minimum via video call) • Follow-up documentation links for further detail on items discussed • Video recording for playback
Guidelines	None

Data lake export – Making use of the data (CDP12)

Once your data lake export is complete, this activity helps you understand the data and what you can do with it. We will cover topics such as:

- How is the data structured?
- What data is in here that is not available in other places?
- What type of custom reports are possible that are not available in the out-of-the-box dashboards?

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Consider a customer's specific needs and technical configuration • Provide guidance on how to use the data in the Data Lake Export from the CDP via an interactive workshop
Prerequisites	Before the activity begins, you must: • Provide a list of people attending the call • Provide a short description of the main goals you are aiming to achieve via the data export
Deliverables	We provide the following deliverables: • Data Export Usage workshop (1-hour minimum via video call) • Follow-up documentation links for further detail on items discussed • Video recording for playback
Guidelines	None

Offline feed – Technical workshop (CDP13)

When setting up your offline feed to import data into the CDP, there are a number of pitfalls and points to consider. In this activity, we will guide you through:

- Using the Batch or REST API to upload Guest and Order data into the platform
- Best practice guidelines
- Answering any questions you may have such as the timing of uploads and when that data will become available across the system

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Consider a customer's specific needs and technical configuration • Provide a technical walkthrough of upload JSON file structure and/or programmatic steps involved in uploading to Batch API • Provide sample starter code for uploading to Batch API
Prerequisites	Before the activity begins, you must: • Provide a list of people attending the call • Provide a short description of the main goals you are aiming to achieve via the data import
Deliverables	We provide the following deliverables: • Offline Feed technical workshop (1-hour minimum via video call) • Follow up documentation links for further detail on items discussed • Video recording for playback
Guidelines	None

Stream API – Web tagging (CDP14)

Get your web tagging set up correctly right from the start with this Activity. It covers:

- Basics of Stream API events & sessions
- Basics of loading the library - what do the config items do?
- How Identity works, including re-identification edge cases
- Discussion on value of add to cart and checkout. Is it worth the effort for your needs?
- Discussion on the value of custom events: Tracking non-conversion based goals, triggering experiences and adding nuance to decisions
- Putting a process in place that works for your team to easily add custom goals as they are needed

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Consider a customer's specific needs and technical configuration • Provide guidance on how to best set up your Web Tags via an interactive workshop
Prerequisites	Before the activity begins, you must: • Provide a list of people attending the call • Provide a short description of the main goals you are aiming to achieve via the web tagging
Deliverables	We provide the following deliverables: • Web Tagging workshop (1-hour minimum via video call) • Follow-up documentation links for further detail on items discussed • Video recording for playback
Guidelines	None

Stream integration – Mobile app or other non-browser clients such as self service kiosks (CDP15)

This activity will help you get a real-time data ingestion integration up and running on your Mobile App or any other non-browser clients such as self-service kiosks. Topics covered include:

- Overview of available out of the box events and custom event options
- Overview of Identity via Stream
- "Browser ID" storage best practices
- Guidance on seamless transition from native to web view pages
- Overview of activating personalization through the Interactive Experience API

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Consider a customer's specific needs and technical configuration • Provide guidance on how to best set up your non-Web real-time data ingestion via an interactive workshop
Prerequisites	Before the activity begins, you must: • Provide a list of people attending the call • Provide a short description of the main goals you are aiming to achieve via the data ingestion
Deliverables	We provide the following deliverables: • Real time data ingestion workshop (1-hour minimum via video call) • Follow-up documentation links for further detail on items discussed • Video recording for playback
Guidelines	None

Activities for Sitecore® Discover

Analytics assessment (D1)

In this Activity, we compare transactions in the Sitecore database and Google Analytics/Adobe system to confirm that the number of missing transactions/orders is not significant.

Size	(1) Activity Point
Type	Evaluation
Tasks	The Sitecore team will: • Query the Sitecore system for transactions occurring in the last 2 weeks • Query the analytic tool for transactions occurring in the last 2 weeks • Validate that the difference is less than 10%
Prerequisites	Before the Activity begins, you must provide Google Analytics/Adobe access.
Deliverables	We provide the following deliverable: • A list of missing transactions
Guidelines	This Activity must occur after the system is live because we must use real data.

Event assessment (D2)

Correct Event capture and input into the AI engine is crucial to the functioning of Sitecore Discover. Missing events can cause inaccuracies in the collected data and results.

Size	(1) Activity Point
Type	Optimization
Tasks	The Sitecore team will: • Assess the ingestion of events through the CEC
Prerequisites	Before the Activity begins, you must: • Confirm all funnel events are implemented • Implement all widget events • Provide access to the e-commerce system • Provide a credit card to test the order confirm event • Provide access to Discover CEC
Deliverables	We provide the following deliverable: • A report listing missing events and the consequences of lacking them
Guidelines	This Activity can be performed in all environments.

Feed review (D3)

Bad formatting of incoming data can cause data feed rows to be dropped. This can have a significant impact if the data in question is important. In this Activity, we thoroughly review your feed file.

Size	(1) Activity Point
Type	Review
Tasks	The Sitecore team will access the feed sync in the Customer Engagement Console (CEC) and assess dropped rows.
Prerequisites	Before the Activity begins, you must: • Complete the feed setup • Provide a short statement regarding the scope of the feed that has been implemented • Provide access to Discover CEC
Deliverables	We provide the following deliverable: • A report that lists the dropped rows
Guidelines	This Activity should be performed in a test environment before going live.

Payload review (D4)

All requests Sitecore receives must include a complete, well-formatted request payload. In this Activity, we review your incoming payloads to make sure they are as expected.

Size	(1) Activity Point
Type	Review
Tasks	The Sitecore team will: • Access the event log through Discover CEC • Filter server requests by customer • Check that requests are as expected • Share details about errors and how to eliminate them
Prerequisites	Before the Activity begins, you must: • Complete the API implementation • Generate traffic to all widgets on the site under review • Provide access to Discover CEC
Deliverables	We provide the following deliverable: • A report highlighting requests with missing/incorrect information, if any, and how to make corrections
Guidelines	This Activity should be performed in your production environment.

Request error check (D5)

In this Activity, Sitecore performs a request error check via the CEC and communicates any changes needed.

Size	(1) Activity Point
Type	Check
Tasks	The Sitecore team will: • Access the CEC • Check for any errors reported • Share details about errors and how to eliminate them
Prerequisites	Before the Activity begins, you must: • Complete the API implementation • Generate traffic to all widgets on the site under review
Deliverables	We provide the following deliverable: • A report highlighting requests with errors, if any, and how to correct them
Guidelines	This Activity should be performed in your production environment.

Personalization check (D6)

The Sitecore Customer Engagement Console (CEC) includes an event monitoring tool that helps you check the events received while you are navigating the site. Personalized items are also monitored. In this Activity, we check that sessions are being personalized as expected.

Size	(1) Activity Point
Type	Check
Tasks	The Sitecore team will: • Navigate the site while checking that events are well-formed and correspond to user behavior on the site • Check that recommended/relevant products shown correspond to the user navigation and clicks
Prerequisites	Before the Activity begins, you must: • Implement all funnel events • Implement all widget events • Complete personalization implementation • Provide access to the e-commerce system
Deliverables	We provide the following deliverables: • A report with the observations collected from navigation • Recommendations of additional configuration if needed
Guidelines	This Activity should be performed in your production environment.

Client engagement console intro (D7)

The Client Engagement Console (CEC) is your entry point to Discover. In this activity, we will do a deep dive into the CEC, its features, and merchandise rules.

Size	(1) Activity Point
Type	Optimization
Tasks	The Sitecore team will: • Prepare material for the session and deliver the session
Prerequisites	Before the Activity begins, you must: • Provide a list of the people attending the call
Deliverables	We provide the following deliverable: • A 45-minute knowledge transfer and Q&A on CEC based on subscribed features and specific client business use cases
Guidelines	This Activity should be performed in your production environment.

Discover analytics intro (D8)

Analytics plays a huge part in the successful usage of Discover. In this activity, we look at all key metrics in Discover's Analytic feature in order to correctly track performances.

Size	(1) Activity Point
Type	Optimization
Tasks	The Sitecore team will: • Prepare material for the session and deliver the session
Prerequisites	Before the Activity begins, you must: • Provide a list of the people attending the call
Deliverables	We provide the following deliverable: • A 1-hour analytics knowledge transfer and Q&A to go over key data and metrics in Analytics. This will also help clients understand all key metrics we use for business reviews
Guidelines	This Activity should be performed in your production environment.

A/B testing & optimization ideas (D9)

Sitecore Discover has many possible use cases and it can feel overwhelming. In this activity, we will help you cut through the noise. Learn more about what to test, how to set up A/B tests, and how to read A/B test results.

Size	(1) Activity Point
Type	Optimization
Tasks	The Sitecore team will: • Prepare material for the session and deliver the session
Prerequisites	Before the Activity begins, you must: • Provide a list of the people attending the call • Provide the specific areas of interest, customer pain points or A/B tests you wish to review and discuss • Review the Pre read provided ahead of the activity
Deliverables	We provide the following deliverable: • A 45-minute optimization workshop • Documentation from workshop • Video reccording for playback if required
Guidelines	None

Widget and device type best practices check (D10)

This post-implementation check activity compares a customer's implementation with Sitecore's best practices guidelines by widget and device type. We review best practices in UI and searches and suggest recipes to use for specific business use cases and provide useful tips on setting up merchandising rules to accomplish business goals. We recommend running this activity at least once per year.

Size	(2) Activity Points
Type	Optimization
Tasks	The Sitecore team will: • Conduct reviews on: - Preview Search - Full Page Search - Recommendations - Email • Create a report summarizing our findings
Prerequisites	Before the Activity begins, you must: • Provide a list of all the websites where Discover tags have been deployed • Provide access to the Discover Production system
Deliverables	We provide the following deliverable: • A report with our findings and recommendations
Guidelines	None

Technical checkup (D11)

As customers make changes to their site over time – typically by a dev team completely separate from the Discover business users – they often accidentally introduce issues into the tagging and/or data collection, rendering reporting and performance inaccurate. These issues can go undetected for weeks or months. We recommend that you run this activity at least once per year to confirm the accuracy of the Discover data.

Size	(2) Activity Points
Type	Check
Tasks	The Sitecore team will check: • Data collection (customers often change how they pass data to Discover or calculate data and if the Discover configuration has not been changed accordingly, reporting becomes inaccurate) • Event tagging (customer dev teams often make changes that accidentally impact how events are sent to Discover and reporting becomes inaccurate) • Page context (customer dev teams often make changes that accidentally impact how context is sent to Discover and reporting becomes inaccurate)
Prerequisites	Before the Activity begins, you must: • Provide a list of all the websites where Discover tags have been deployed • Provide access to the Discover Production system
Deliverables	We provide the following deliverable: • A report with our findings and recommendations
Guidelines	None

Peak time traffic planning (D12)

In this activity, we conduct a Brainstorm session with you and your team on how to manage Peak Time Traffic periods such as Black Friday and other Sales Events and help you plan how to deal with these periods using Discover (e.g. by adding widgets).

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Brainstorming and planning workshop • Documentation from workshop • Video recording for playback
Prerequisites	Before the Activity begins, you must: • Provide a list of the people attending the call so they can be invited to the Miro Board • Review the Pre read provided ahead of the activity
Deliverables	We provide the following deliverables: • Brainstorming and Planning workshop (1-hour minimum via video call) • Pre-read for workshop • Video reccording for playback if required
Guidelines	None

Art of the possible workshop (D13)

Using specific areas of interest or specific Business KPIs, we will present a view of potential future opportunities, learnings, and best-in-class examples from other businesses and industries. Customers can use these insights for inspiration for ideas they can implement within their own business.

Size	(2) Activity Points
Type	Optimization
Tasks	The Sitecore team will: • Conduct research to prepare for the workshop • Provide art of the possible workshop • Provide documentation from workshop • Provide video recording for playback
Prerequisites	Before the Activity begins, you must: • Provide a list of the people attending the call • Provide the areas of interest or KPIs being targetted to help guide the research for the workshop
Deliverables	We provide the following deliverable: • Art of the possible workshop • Documentation from workshop • Video recording for playback if required
Guidelines	None

Business review focused on Discover (D14)

This activity is a business review for decision-makers within your business (not necessarily the day-to-day users). In this activity, we review performance, learnings, and dashboards. We recommend doing this activity at least once per year.

| Size	(2) Activity Points
Type	Optimization
Tasks	The Sitecore team will: • Prepare content for the business review • Deliver the business review via video call • Provide documentation and information reviewed • Provide video recording for playback
Prerequisites	Before the Activity begins, you must: • Provide a list of the people attending the call • Provide the areas of interest or areas of concern you may wish to discuss • Provide any other objectives or KPIs that may require future focus from Sitecore team
Deliverables	We provide the following deliverable: • Business review delivery via video call • Any reports or documentation for the meeting • Video recording for playback
Guidelines	None

Activities for Sitecore® Email Experience Manager (EXM)

EXM marketing automation review and best practices session (EXM1)

EXM allows you to create meaningful email experiences that connect people and brands. This 2-hour, face-to-face video session will show you how to confidently use the tool for email deliverability, IP warm up, and list hygiene, as well as growing and maintaining crucial touchpoints throughout the customer lifecycle. This Activity also helps you gain functional knowledge of list manager, email creation, and marketing automation. Sitecore will provide training guides, materials, and online sessions that present the key elements of these features.

Size	(2) Activity Points
Type	Workshop
Tasks	A member of the Sitecore team will: • Attend a call where members of your team present your EXM setup • Review the setup and provide expert feedback and advice
Prerequisites	Before the Activity begins, you must have configured EXM to send emails.
Deliverables	We provide the following deliverable: • A 2-hour video call that offers feedback and advice on your work
Guidelines	This Activity is a nontechnical session conducted by a business consultant.
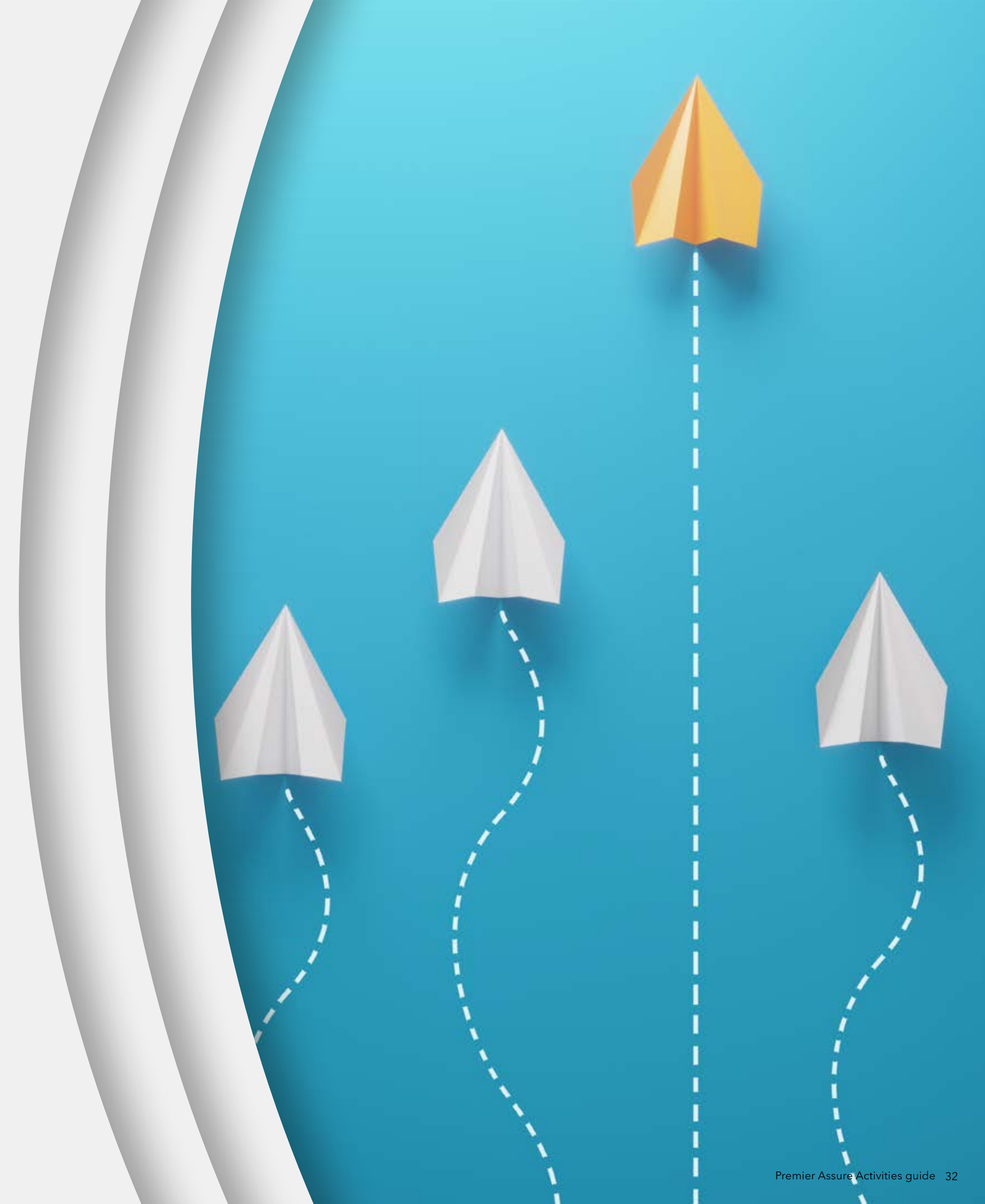
Activities for Sitecore® OrderCloud®

Security assessment (OC1)

The flexibility of Sitecore® OrderCloud® makes it possible to configure security in a multitude of ways. The goal of this Activity is to review key configurations that impact security to ensure adherence to best practices.

Size	(1) Activity Point
Type	Evaluation
Tasks	The Sitecore team will review key configurations related to security and verify that they have been configured according to our general best practices. Specifically, we will review: • Security profiles • API clients • Webhooks: OpenID Connects • Integration events
Prerequisites	Before the Activity begins, you must add Sitecore as a collaborator to the marketplace. **Note:** It is helpful, but not required to highlight any security requirements that are specific to your solution.
Deliverables	We provide the following deliverables: • A report of verified items and whether they were configured according to best practices, as well as suggestions for improving security • A 1-hour call to review the report
Guidelines	This Activity must be performed in your production environment. Use of the security assessment and reliance thereon is at user's sole risk. The security assessment is provided on an "as is" basis. Sitecore makes no warranty of any kind whether express or implied, statutory or otherwise, including without limitation as to the results to be obtained from use of the security assessment, that the security assessment will be error-free, complete or accurate, any implied warranty of merchantability, fitness for a particular purpose, title, infringement, or otherwise. Neither Sitecore nor its affiliates nor subsidiaries will in any way be liable to user or any other entity or person for any inaccuracies, errors, omissions, delays, computer viruses, security breaches or other damages (whether direct or indirect), claims, liabilities or losses, regardless of cause, in or arising from the use of the security assessmenUse of the security assessment and reliance thereon is at user's sole risk. The security assessment is provided on an "as is" basis. Sitecore makes no warranty of any kind whether express or implied, statutory or otherwise, including without limitation as to the results to be obtained from use of the security assessment, that the security assessment will be error-free, complete or accurate, any implied warranty of merchantability, fitness for a particular purpose, title, infringement, or otherwise. Neither Sitecore nor its affiliates nor subsidiaries will in any way be liable to user or any other entity or person for any inaccuracies, errors, omissions, delays, computer viruses, security breaches or other damages (whether direct or indirect), claims, liabilities or losses, regardless of cause, in or arising from the use of the security assessment.

Sitecore OrderCloud Extended Properties (XP) evaluation (OC2)

Sitecore OrderCloud XP is a feature that allows you to extend the data model with custom business-specific properties. These properties can also be used to query and filter entities in OrderCloud. OrderCloud XP is a powerful feature, but it can be misused. Structuring OrderCloud XP incorrectly can negatively impact performance. This Activity ensures that best practices related to structuring and use of XP are observed in order to mitigate any performance issues.

Size	(1) Activity Point
Type	Evaluation
Tasks	The Sitecore team will review certain key resources that commonly use Order Cloud XP, to ensure they are used in a way that is conducive to a scalable application long term. These resources include: • Products • Orders • Admin users • Supplier users • Buyer users
Prerequisites	Before the Activity begins, you must: • Add Sitecore as a collaborator to the marketplace. At minimum we will need read access to the resources under review • Fill out the provided Order Cloud Extended Properties excel spreadsheet with the known information of the extended properties created
Deliverables	We provide the following deliverables: • A report of verified items and whether they were configured according to best practices, as well as suggestions for improving the data model for OrderCloud XP • A 1-hour call to review the report
Guidelines	• This Activity must be performed in your production environment • Minimum access needed when inviting Sitecore to OrderCloud Marketplace • Under impersonation the following will be needed: Seller Users, Buyer Users, Supplier Users • Under OrderCloud Data Access the following will be needed: AdminUserReader, BuyerUserReader, SupplierUserReader, ProductReader, and OrderReader

New feature review (OC3)

Before you invest development hours on a feature, a review by one of our experts will ensure the solution is simple and scalable and leverages the most appropriate features in the OrderCloud platform.

Size	(2) Activity Points
Type	Review
Tasks	The Sitecore team will: • Review your feature requirements • Review your feature solution • Provide feedback on your proposed solution
Prerequisites	Before the Activity begins, you must: • Provide Sitecore with the feature requirements • Provide Sitecore with the feature solution proposal • Grant us a 1-hour session after we receive the feature requirements and proposal to ask clarifying questions
Deliverables	We provide the following deliverables: • A report of our evaluation • Architecture diagrams and a supporting document explaining our proposal if we suggest alternate solutions • A 1-hour call to review alternative solutions
Guidelines	This Activity must be performed in your production environment.

Architecture review (OC4)

Before you invest development hours on a target architecture, a review by one of our experts ensures the architecture is simple and scalable and leverages the most appropriate features in the OrderCloud platform.

Size	(2) Activity Points
Type	Evaluation
Tasks	The Sitecore team will: • Review high-level requirements • Review user types, functions, and user flows • Review proposed architecture • Provide feedback on proposed architecture
Prerequisites	Before the Activity begins, you must: • Provide high-level requirements • Provide user types, functions, and user flows • Provide the proposed architecture • Grant us a 1-hour session after we receive the requirements and proposal to ask clarifying questions (This may require more than 1 session depending on complexity)
Deliverables	We provide the following deliverables: • A report of our evaluation • Architecture diagrams and a supporting document explaining our proposal if we suggest alternate architectures • A 1-hour call to review alternate architecture (This may require more than 1 session depending on complexity)
Guidelines	N/A

Activities for Sitecore® Personalize

Web template review (P1)

Web templates are reusable placeholders for web elements that you want to display with Sitecore Personalize. In this Activity, we thoroughly review your web template implementation and highlight any issues and potential improvements.

Size	(1) Activity Point
Type	Review
Tasks	The Sitecore team will: • Create a web experience with your web template • Simulate customer interactions with that web experience to ensure the web template is functioning as expected • Simulate different device types to ensure rendering of the Web template is as expected • Check the web template code for any code constructs that could be made more performant • Check the web template code for common errors and bugs
Prerequisites	Before the Activity begins, you must: • Provide a statement describing the goal of the web template • Have Sitecore web experiences configured on your test environment • Be able to create a web experience using the template without any errors • Grant access to UAT/staging website • Grant access to Sitecore Personalize
Deliverables	We provide the following deliverables: • A document listing all the checks performed, a Red/Amber/Green status, and a comment (if status is Red or Amber) • A second iteration of the document that addresses your questions or comments
Guidelines	• This Activity is for 1 web template only • The Activity must be performed on your UAT/staging website

Audience template review (P2)

Audience templates are reusable audience filters that you may want to reuse in Sitecore Personalize. In this Activity, we thoroughly review of your audience template implementation and highlight any issues and potential improvements.

Size	(1) Activity Point
Type	Review
Tasks	The Sitecore team will: • Create a full-stack experience with your audience template • Simulate customer interactions with that experience to ensure the audience template is functioning as expected • Check the audience template code for any code constructs that could be made more performant • Check the audience template code for common errors and bugs
Prerequisites	Before the Activity begins, you must: • Provide a statement describing the goal of the audience template • Grant access to Sitecore Personalize
Deliverables	We provide the following deliverables: • A document listing the checks performed, a Red/Amber/Green status, and a comment, if status is Red or Amber • A second iteration of the document that addresses your questions or comments
Guidelines	• This Activity covers 1 audience template only • The Activity must be performed in your Sitecore Personalize environment

Decision template review (P3)

Decision templates are reusable programmables – elements on a decision canvas with logic defined in JavaScript – that you may want to reuse across decision models in Sitecore Personalize. In this Activity, we thoroughly review your decision template implementation and highlight any issues and potential improvements.

Size	(1) Activity Point (0-50 lines of code) (2) Activity Points (51-250 lines of code) (4) Activity Points (251+ lines of code)
Type	Review
Tasks	The Sitecore team will: • Create a decision model with your decision template • Simulate customer interactions with that decision model to ensure the decision template is functioning as expected • Check the decision template code for any code constructs that could be made more performant • Check the decision template code for common errors and bugs
Prerequisites	Before the Activity begins, you must: • Provide a statement describing the goal of the decision template • Grant access to Sitecore Personalize
Deliverables	We provide the following deliverables: • A document listing all the checks performed, a Red/Amber/Green status, and a comment if status is Red or Amber • A second iteration of the document addressing your questions or comments
Guidelines	• This Activity covers 1 decision template only • The Activity must be performed in your Personalize environment

A/B test tracking configuration review (P4)

In some cases, you may choose to set up multiple metrics to measure in your Sitecore Personalize A/B test. In other cases, you may have configured a custom metric and deployed tags to generate tracking events. In all cases, finding out that you have configured your test incorrectly weeks after it has started is a huge waste of time, and the test needs to be restarted. In this Activity, we will assess your A/B test goals are correctly configured for analytics.

Size	(1) Activity Point
Type	Review
Tasks	The Sitecore team will: • Review your configuration of the test in Sitecore Personalize. • Simulate various customer scenarios to ensure that the test tracking metrics are being captured • Check for any common errors and misconfigurations • Check statistical significance metrics are configured as intended
Prerequisites	Before the Activity begins, you must: • Provide a statement describing your AB test and the goals you have configured • Configure the A/B test in Sitecore Personalise • Configure and deploy any tags used to capture tracking metrics • Provide base rate, minimum detectable difference and confidence level for the test primary goal • Grant access to Sitecore Personalize (UAT or Production)
Deliverables	We provide the following deliverables: • A document listing all of the checks performed, a Red/Amber/Green status, and a comment (if status is Red or Amber) • If a customer has questions or comments, a second iteration of the document will be provided addressing those questions or comments
Guidelines	Ideally this check should be performed on the Production environment before going live to customers, but otherwise can be performed in UAT before the push to Production

CDP operating models best practices (P5)

Is there room for improvement in your Operating Model? Or has it been some time since you last reviewed your Operating Model? In this activity, we will look at the Best Practices in how to set up your people, tools, processes, and artifacts.

Size	(1) Activity Point
Type	Optimization
Tasks	The Sitecore team will: • Prepare material for the workshop and deliver the workshop
Prerequisites	None
Deliverables	We provide the following deliverables: • Best practices workshop • Documentation from workshop • Video recording for playback if required
Guidelines	None

Review of current personalization experiments (P6)

An important first step with Personalize is setting up and running Experiments. The next step is to review the Experiment results. In this activity we will look at the experiences that have run in Personalize and discuss new iterations, learnings, and what should be turned to Always On or learnings used in other parts of your site/channels.

Size	(2) Activity Points
Type	Review
Tasks	The Sitecore team will: • Review results of previous Personalize experiences and run workshop
Prerequisites	Before the Activity begins, you must: • Provide a list of Experiments and results that Sitecore may not have access to • Provide guidelines of what Experiments / Channels / etc you wish to review
Deliverables	We provide the following deliverables: • Provide review workshop, • Provide documentation from workshop, • Provide video reccording for playback with required
Guidelines	None

Use case idea generation (P7)

It can be difficult to know what use cases to do next and what areas to test with customers. In this activity, we will guide a focused brainstorm session on idea generation for potential use cases that are specific to your situation.

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Prepare material for the workshop and deliver the workshop
Prerequisites	Before the Activity begins, you must: • Provide a list of the people attending the call so they can be invited to the Miro Ideation Board • Review the pre-read provided ahead of the activity
Deliverables	We provide the following deliverables: • Ideation workshop (1-hour minimum via video call) • Pre-read for workshop • Video recording for playback with required
Guidelines	None

Best practices on setting up personalized experiences (P8)

An important first step with Personalize is setting up and running Experiments. The next step is to review the Experiment results. In this activity we will look at the experiences that have run in Personalize and discuss new iterations, learnings.

Size	(1) Activity Point
Type	Optimization
Tasks	The Sitecore team will: • Prepare material for the workshop and deliver the workshop
Prerequisites	Before the Activity begins, you must: • Provide a list of the people attending the call so they can be invited to the Miro Ideation Board if required
Deliverables	We provide the following deliverables: • Best practices workshop • Documentation from workshop • Video recording for playback with required
Guidelines	None

Overview of AB Testing in Personalize for non-technical users (P9)

An important feature of Sitecore Personalize is the ability to run A/B Tests. But each test is different - was the test successful? Did we pick the right KPIs to gauge its success? Did it run for long enough? In this activity, we will share knowledge on how to set up tests and keep track of performance as well as best practices in A/B Testing in Sitecore Personalize. This Activity is aimed at non-technical users.

Size	(1) Activity Points
Type	Optimization
Tasks	The Sitecore team will: • Prepare material for the workshop and deliver the workshop
Prerequisites	Before the Activity begins, you must: • Provide a list of the people attending the call
Deliverables	We provide the following deliverables: • Best practices workshop • Documentation from workshop • Video recording for playback with required
Guidelines	This Activity is aimed at non-technical users

Decision models usage optimization (P10)

Sitecore Personalize provides a solution to decision management at scale across channels and in real-time. Sitecore Personalize decisioning enables business users to model and run decisions using business rules. You can use the same decision model in different experiments across different channels. In this activity, we provide best practices on decision models in Sitecore Personalize.

Size	(2) Activity Points
Type	Optimization
Tasks	The Sitecore team will: • Prepare material for the workshop and deliver the workshop
Prerequisites	Before the Activity begins, you must: • Provide a list of the people attending the call
Deliverables	We provide the following deliverables: • Best practices workshop • Documentation from workshop • Video recording for playback with required
Guidelines	None

Web tagging review (P11)

There are many ways to capture data from your web channel with the Stream API. Your website layout, the data that is available, and what you want to do with that data all influence how you should capture your web behavioral data. In this activity, we thoroughly review your implementation and highlight any issues and potential improvements.

Size	(4) Activity Points
Type	Review
Tasks	The Sitecore team will: • Interact with your website to complete typical customer actions and check that customer data is captured as expected • Ensure that Identity events result in customer profiles merging as expected • Check for incoming data that is malformed or missing • Check duplication of data or events • Check performance (timing) of library loading and execution of library functions • Check for timing issues when making data available to the tags • Check for potential issues related to session or event limits
Prerequisites	Before the Activity begins, you must: • Provide a statement describing your web behavioral data capture goals • Fully deploy and test the data capture tags on your website • Share the tags and configuration with the Sitecore team • Grant access to the user acceptance testing (UAT)/staging website, if the activity is being performed on that website) • Grant access to Sitecore Personalize Platform
Deliverables	We provide the following deliverables: • A list of the checks performed, a Red/Amber/Green status, and a comment (if status is Red or Amber) • A second iteration of the document that addresses your questions or comments
Guidelines	This activity covers a single website only. It can be performed on either a UAT/staging or production website.

Identity rules review (P12)

An identity rule is used to determine the identifying information that uniquely defines an individual, and to allow profiles with the same information to be merged. Identity rules can be complex, with the most reliable or important rules at the top of the hierarchy. In this activity, we assess your identity rules and how identifying information is gathered, looking for common corner cases that cause unexpected behavior.

Size	(2) Activity Points
Type	Review
Tasks	The Sitecore team will: • Run various scenarios to ensure that your hierarchy of rules is behaving as expected • Analyze the sources of identifying information • Note any areas where identity rules may not behave as expected (e.g., race conditions when identifying information comes from different sources)
Prerequisites	Before the Activity begins, you must: • Have fully configured identity rules and data capture • Provide a statement describing the expected behavior of your rules • Provide details of all systems and channels that will use the identifiers to upload data into Sitecore Personalize • Grant access to the Sitecore Personalize Production environment
Deliverables	We provide the following deliverables: • A short document describing the observed behavior of the identity rules, as well as recommendations on how to resolve any issues found • A second iteration of the document that addresses your questions or comments
Guidelines	This activity covers a single set of Identity rules only.

Mobile/non-web stream integration review (P13)

Sitecore Personalize can ingest real-time data from any source via the Stream API. Ingesting that data from multiple sources creates complexity around merging and usage of that data, and there may be situations where necessary data is not being captured. In this activity, we thoroughly assess the data you are capturing across your channels, highlighting any issues and potential improvements.

Size	(4) Activity Points
Type	Review
Tasks	The Sitecore team will: • Interact with your channels to complete typical customer actions and check that the customer data is captured as expected • Ensure that Identity events result in customer profiles merging as expected • Check for incoming data that is malformed or missing • Check duplication of data or events • Check performance (timing) of library loading and execution of library functions (if applicable to that channel) • Check for potential issues related to session or event limits
Prerequisites	Before the Activity begins, you must: • Provide a statement describing your web behavioral data capture goals • Fully deploy the data capture functionality to the channels being reviewed and test it • Grant remote access to the channels to allow the reviewer to interact with them, including login and purchase/ordering details where necessary • Grant access to Sitecore Personalize (UAT or Production)
Deliverables	This activity can be performed on either the UAT or production environment
Guidelines	This activity covers a single set of Identity rules only.

Personalize – Identity resolution rule review/changes (P14)

An identity rule is used to decide what piece or pieces of identifying information uniquely define an individual, and allows profiles with the same identifying information to be merged. Identity rules can be complex. Most often, a hierarchy of rules is used, with the most reliable or important rules at the top. In this activity, we assess your identity rules and how identifying information is gathered, seeking out common corner cases that cause unexpected behavior. If you must change identity rules, we analyze the proposal and check its feasibility with all the data provided to us. If feasible, we update the rules in UAT and extensively test and document all ingestion channels for the new identity rule configuration. We also ensure that any downstream systems still work with new identifiers.

Size	(2) Activity Points
Type	Optimization
Tasks	The Sitecore team will: • Analyze the proposal of new rules and check their feasibility • Test and document rule behavior on all ingestion channels (Stream, REST, and batch APIs) in UAT
Prerequisites	Before the Activity begins, you must: • Fully configure identity rules and data capture in UAT • Provide a statement describing the expected behavior of the new identity rule configuration • Provide details of systems/channels that use identifiers to upload data into Personalize profiles • Grant access to the Sitecore Personalize UAT and production environment • Provide details of identifiers available in all existing systems and channels and newly proposed channels that upload data into Personalize • Provide details of downstream systems and APIs that require identifiers to work
Deliverables	We provide the following deliverables: • A decision on whether updates to rules can be achieved safely • A document describing all scenarios tested for uploading to Sitecore Personalize with new identity rules
Guidelines	None

Stream API – Web tagging workshop (P15)

Get your web tagging set up correctly right from the start with this Activity. It covers:
- Basics of Stream API events & sessions
- Basics of loading the library - what do the config items do?
- How identity works, including re-identification edge cases
- Discussion on value of add to cart and checkout - is it worth the effort for your needs?
- Discussion on the value of custom events - tracking non-conversion based goals, triggering experiences and adding nuance to decisions
- Putting a process in place that works for your team to easily add custom goals as they are needed

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Consider a customer's specific needs and technical configuration • Provide guidance on how to best set up your Web Tags via an interactive workshop
Prerequisites	Before the Activity begins, you must: • Provide a list of people attending the call • Provide a short description of the main goals you are aiming to achieve via the web tagging
Deliverables	We provide the following deliverables: • Web Tagging workshop (1-hour minimum via video call) • Follow-up documentation links for further detail on items discussed • Video recording for playback
Guidelines	None

Setting up for success with A/B testing (P16)

In this activity, the Sitecore team will take your team through each of the steps involved in setting up an A/B test to get the maximum value from it. They will address:

Test Setup
- Statistical Significance - how to calculate it and why it exists
- Base values set up - how to choose and set these values
- Constructing a fair test between variants

Goals
- Selecting a primary goal
- Exploration of both custom and out of the box goals
- What data is needed for each goal type to work
- How to test and debug your goals before you go live

This Activity is suitable for both technical and non-technical users.

Size	(2) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Tailor the content of this workshop to the needs and particular skill sets of the customer team • Lead attendees through the process of setting up tests for themselves • Provide guidance on how to set up an efficient team process for creating tests
Prerequisites	Before the Activity begins, you must: • Provide a list of people attending the call • Provide a short description of the type of tests that you would hope to run, including measurement metrics of interest where possible
Deliverables	We provide the following deliverables: • Interactive A/B testing workshop (2 hour minimum via video call) • Follow-up documentation links for further detail on items discussed • Video recording for playback
Guidelines	None

Stream integration with mobile app/other non-browser clients such as self-service kiosks - Workshop (P17)

This activity will help you get a real-time data ingestion integration up and running on your Mobile App or any other non-browser clients such as self-service kiosks. Topics covered include:

- Overview of available out-of-the-box events and custom event options
- Overview of Identity via Stream
- "Browser ID" storage best practices
- Guidance on seamless transition from native to web view pages
- Overview of activating personalization through the Interactive Experience API

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Consider a customer's specific needs and technical configuration • Provide guidance on how to best set up your non-Web real-time data ingestion via an interactive workshop
Prerequisites	Before the Activity begins, you must: • Provide a list of people attending the call • Provide a short description of the main goals you are aiming to achieve via the data ingestion
Deliverables	We provide the following deliverables: • Real time data ingestion workshop (1-hour minimum via video call) • Follow-up documentation links for further detail on items discussed • Video recording for playback
Guidelines	None

A/B tests – Optimized testing (P18)

In this activity, the Sitecore team explains the optimized testing feature and discusses how it might be best used for your needs. We will cover topics such as:

- What it is and how it works
- How optimized testing can be used to passively maximize on given metrics such as conversion rate
- Pros and Cons of optimized testing vs actively managed variant distributions

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Consider a customer's specific approach to A/B testing • Provide guidance on how to best optimize testing to your advantage
Prerequisites	Before the Activity begins, you must: • Provide a list of people attending the call • Optionally provide any pain points that you hope optimizes testing can ease
Deliverables	We provide the following deliverables: • Optimized testing workshop (1-hour minimum via video call) • Follow-up documentation links for further detail on items discussed • Video recording for playback
Guidelines	None

Using connections to connect the platform to your third-party systems – Workshop (P19)

In this activity, the Sitecore team will take your team through the steps involved in setting up a connection to a third-party system and using it in a use case. We will cover topics such as:

- Walk through of the connections feature and how to use it
- What connections are and aren't supported
- Using these connections in decisioning, testing, and personalization
- Guidance on specific connections that you would like to create and how to put them to use

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Consider a customer's specific need for connections to the platform • Provide guidance on how to use the Connections feature
Prerequisites	Before the Activity begins, you must: • Provide a list of people attending the call. • Optionally provide details of any specific connection you wish to address during the call. (HTTP endpoint, auth requirements, required payload, required headers etc.)
Deliverables	We provide the following deliverables: • Connections workshop (1-hour minimum via video call) • Follow-up documentation links for further detail on items discussed • Video recording for playback
Guidelines	None

Server side stream integration – Workshop (P20)

This activity will help you to architect a server-side real-time data ingestion integration and provide insights on how to get it up and running. Topics covered include:

- Overview of available out-of-the-box events and custom event options
- Best practices for Point of Sale
- Best practices for Identity management
- Limitations of data availability and validation of suitability for intended use cases

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Consider a customer's specific needs and technical configuration • Provide guidance on how to best set up your non-web real-time data ingestion via an interactive workshop
Prerequisites	Before the Activity begins, you must: • Provide a list of people attending the call • Provide a short description of the main goals you are aiming to achieve via the data ingestion
Deliverables	We provide the following deliverables: • Real time data ingestion workshop (1-hour minimum via video call) • Follow-up documentation links for further detail on items discussed • Video recording for playback
Guidelines	None

Activities for Sitecore Search

Event assessment (SRCH2)

Correct Event capture and input into the AI engine are crucial to the functioning of Sitecore Search.

Missing events can cause inaccuracies in the collected data and results.

Size	(1) Activity Point
Type	Optimization
Tasks	The Sitecore team will: • Assess the ingestion of events
Prerequisites	Before the activity begins, you must: • Confirm all funnel events are implemented • Implement all widget events • Provide access to the e-commerce system • Provide Credit card to test the order confirm event
Deliverables	We provide the following deliverables: • A report listing missing events and the consequences of lacking them
Guidelines	This activity can be performed in all environments

Source review (SRCH3)

Bad formatting of incoming data can cause data feed rows to be dropped. This can have a significant impact if the data in question is important. In this activity, we thoroughly review your feed file.

Size	(1) Activity Point
Type	Review
Tasks	The Sitecore team will: • Access the feed sync in the Customer Engagement Console (CEC) and assess dropped rows
Prerequisites	Before the activity begins, you must: • Complete the feed setup • Provide a short statement regarding the scope of the feed that has been implemented
Deliverables	We provide the following deliverables: • A report that lists the dropped rows
Guidelines	This activity should be performed in a test environment before going live

Payload review (SRCH4)

All requests Sitecore receives must include a complete, well-formatted request payload. In this activity, we review your incoming payloads to make sure they are as expected.

Size	(1) Activity Point
Type	Review
Tasks	The Sitecore team will: • Access the log tool • Filter server requests by customer • Check that requests are as expected • Share details about errors and how to eliminate them
Prerequisites	Before the activity begins, you must: • Complete the API implementation • Generate traffic to all widgets on the site under review
Deliverables	We provide the following deliverables: • A report highlighting requests with missing/incorrect information, if any, and how to correct it
Guidelines	This activity should be performed in a production environment

Request error check (SRCH5)

In this activity, Sitecore performs a request error check via the Customer Engagement Console (CEC) and communicates any changes needed.

Size	(1) Activity Point
Type	Check
Tasks	The Sitecore team will: • Access CEC • Check for any errors reported • Share details about errors and how to eliminate them
Prerequisites	Before the activity begins, you must: • Complete the API implementation • Generate traffic to all widgets on the site under review
Deliverables	We provide the following deliverables: • A report highlighting requests with errors, if any, and how to correct them
Guidelines	This activity should be performed in your production environment

Personalization check (SRCH6)

The Sitecore Commerce Engagement Console (CEC) includes an event monitoring tool that helps you check the events received while you are navigating the site. Personalized items are also monitored. In this activity, we check that sessions are being personalized as expected.

Size	(1) Activity Point
Type	Check
Tasks	The Sitecore team will: • Navigate the site while checking that events are well-formed and correspond to user behavior on the site • Check that recommended / relevant products shown correspond to the user navigation and clicks
Prerequisites	Before the activity begins, you must: • Implement all funnel events • Implement all widget events • Complete personalization implementation • Provide access to the e-commerce system
Deliverables	We provide the following deliverables: • A report with the observations collected from navigation • Recommendations of additional configuration if needed
Guidelines	None

Intro to Search (SRCH7)

This Activity offers both an overview of Search and features available.

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Prepare and deliver the workshop.
Prerequisites	None
Deliverables	We provide the following deliverables: • A 1-hour (minimum) video call session
Guidelines	None

Activities for Sitecore Send

Sitecore Send review and best practices session (SD1)

Sitecore Send allows you to create meaningful email experiences that connect people and brands. In this 2-hour, face-to-face video session, you will learn how to confidently use the tool for email deliverability, IP warm up, list hygiene and growth, and maintaining crucial touchpoints throughout the customer lifecycle. This Activity also helps you gain functional knowledge of List Manager, Email Creation, and Marketing Automation. Sitecore will provide training guides, materials, and online sessions that present key elements of these features.

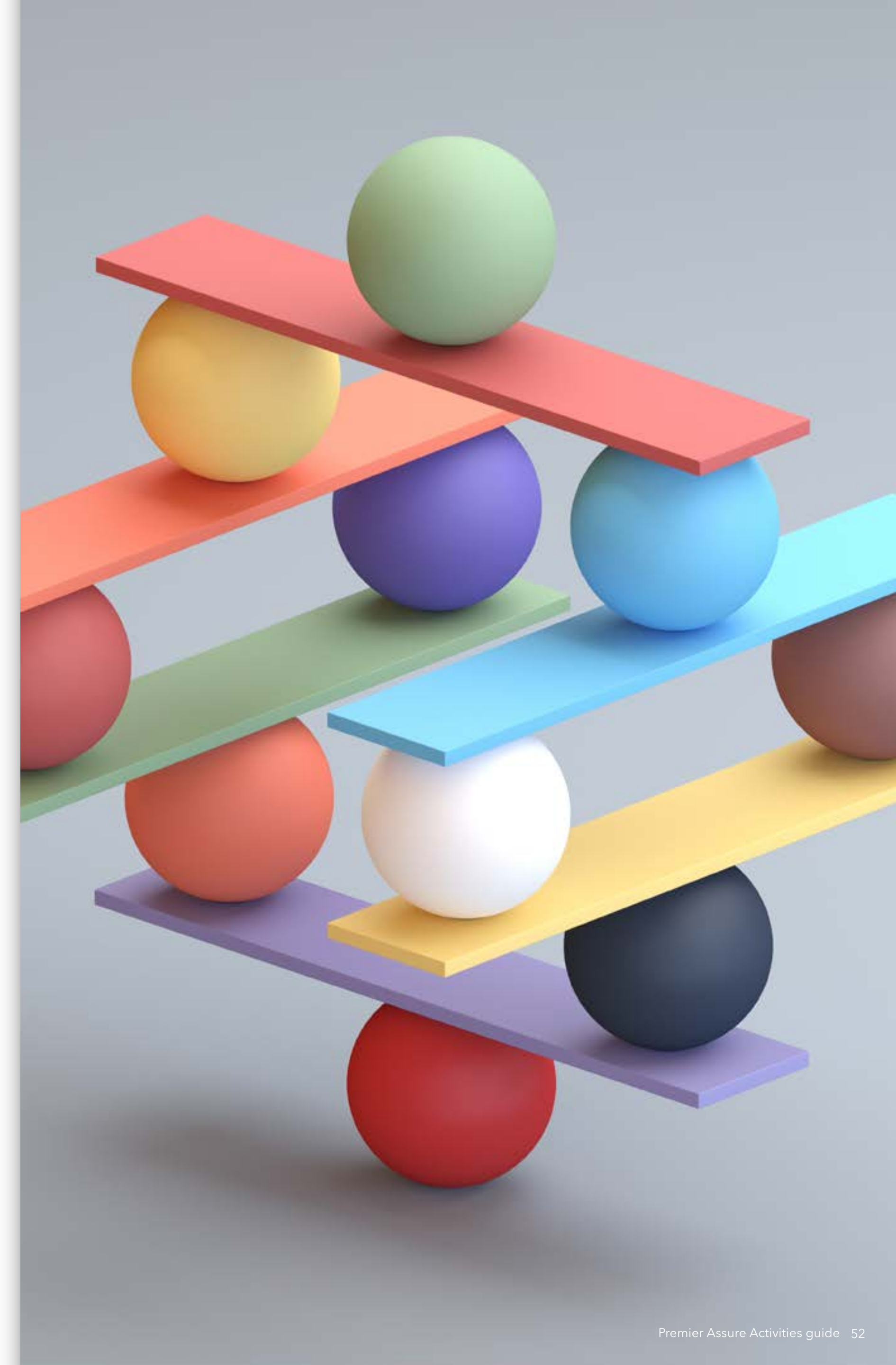| Size	(1) Activity Point
Type	Review
Tasks	A member of the Sitecore team will: • Attend a call where members of your team can present your Sitecore Send setup • Review the setup and provide expert feedback and advice
Prerequisites	Before the list manager, email creation, and marketing automation begins, you must have configured Sitecore Send to send emails.
Deliverables	We provide the following deliverable: • A 2-hour video call where feedback and advice on your work will be provided
Guidelines	Use of the security review and reliance thereon is at user's sole risk. The security review is provided on an "as is" basis. Sitecore makes no warranty of any kind whether express or implied, statutory or otherwise, including without limitation as to the results to be obtained from use of the security review, that the security review will be error free, complete or accurate, any implied warranty of merchantability, fitness for a particular purpose, title, infringement, or otherwise. Neither Sitecore nor its affiliates nor subsidiaries will in any way be liable to user or any other entity or person for any inaccuracies, errors, omissions, delays, computer virus, security breaches or other damages (whether direct or indirect), claims, liabilities or losses, regardless of cause, in or arising from the use of the security review.

Activities for Sitecore® Experience Platform and Experience Manager® (XP/XM)

Website solution review – WSR (X1)

This Activity thoroughly reviews your Sitecore website. Our experienced team performs a deep-dive analysis of your implementation across your architecture, solution, performance configuration, and security configuration.

Size	(12) Activity Points
Type	Evaluation
Tasks	The Sitecore team will: • Review one of your websites • Create a report detailing findings • Answer a single set of follow-up questions
Prerequisites	Before the Activity begins, you must: • Provide a copy of your most current code • Provide a copy of your most current production database

Deliverables	We provide the following deliverables:
	
	 • A report describing our findings and recommendations. The report covers the following topics:
	  – System architecture assessment
	  – Sitecore architecture review
	  – Solution review
	  – Performance
	  – Security
	  – A single set of follow-up questions (answered by email)

Guidelines	Use of the security review and reliance thereon is at user's sole risk. The security review is provided on an "as is" basis. Sitecore makes no warranty of any kind whether express or implied, statutory or otherwise, including without limitation as to the results to be obtained from use of the security review, that the security review will be error free, complete or accurate, any implied warranty of merchantability, fitness for a particular purpose, title, infringement, or otherwise. Neither Sitecore nor its affiliates nor subsidiaries will in any way be liable to user or any other entity or person for any inaccuracies, errors, omissions, delays, computer virus, security breaches or other damages (whether direct or indirect), claims, liabilities or losses, regardless of cause, in or arising from the use of the security review.

Sitecore cache configuration check (X2)

You should optimize the configuration and sizing of your cache settings to maximize the performance of your websites. In this Activity, we review your setup and offer recommendations to optimize your cache configuration.

Size	(4) Activity Points
Type	Check
Tasks	The Sitecore team will: • Review your Sitecore cache usage • Provide feedback based on the result • Do a second review after you have applied the cache recommendations • Provide feedback based on the result
Prerequisites	Before the Activity begins, you must: • Provide complete access to the infrastructure environment(s) under review, where Sitecore is installed and running, as well as access to auxiliary infrastructure such as database servers and search servers • Provide administrative access to the Sitecore CMS login • Have enabled Sitecore logs to at least Warning level on the principal Sitecore roles – standalone, CM, CD – for the environment(s) under review • Provide access to Sitecore logs if they are stored outside the Sitecore infrastructure
Deliverables	We provide the following deliverables: • A report with findings and suggested next steps to increase or decrease cache sizes for different Sitecore components • A second report – if a second review is done after you have applied the suggestions from the first report – that outlines further steps in reconfiguring cache sizes
Guidelines	• Scope includes 1 Sitecore environment per environment • This Activity is performed in your production environment

Sitecore role and database distribution review (X3)

The configuration of your Sitecore XP or XM roles and database can cause bottlenecks and other performance issues. In this Activity, we do a deep dive on your configuration to make sure it is set up to avoid role and database distribution problems.

Size	(4) Activity Points
Type	Review
Tasks	The Sitecore team will: • Review your Sitecore environment(s) for possible infrastructure performance choke points • Provide feedback based on the result
Prerequisites	Before the Activity begins, you must: • Provide infrastructure diagrams of the environment(s) under review • Provide the Sitecore version each environment is running on • Provide complete access to the infrastructure environment(s) under review, together with access to auxiliary infrastructure such as database servers and search servers • Provide history of any performance issues or outages caused by single-point-of-failure configurations for the environment(s) in question
Deliverables	We provide the following deliverables: • A report with findings and suggested next steps, including suggestions for improvement, such as splitting roles into their own infrastructure, adding duplicate roles for redundancy, or scaling up current infrastructure performance
Guidelines	• Scope includes 1 Sitecore environment per Activity • This Activity is performed in your production environment

Azure cost review (X4)

This Activity gathers important insights into your Azure spend and uncovers cost-saving options. Costs and recommendations are captured in a review document.

Size	(12) Activity Points
Type	Review
Tasks	The Sitecore team will review 1 environment, focusing on key metrics for resource scaling, usage, and cost for Sitecore and other resources. We document costs and give recommendations focused on cost savings.
Prerequisites	Before the Activity begins, you must: • Provide access to your Azure Subscription as Contributor for all the environments we should investigate • Designate someone who can determine when the environments are idle • Provide an automation account to run automated scripts
Deliverables	We provide the following deliverables: • An extensive report on Azure consumption for the production environment and ways to minimize the cost of Azure consumption • Automated scripts for downgrading lower Azure environments – UAT, DEV, PREPROD, QA – to basic or free tiers • Follow up with monitoring of the Azure environments
Guidelines	This Activity covers 1 environment.

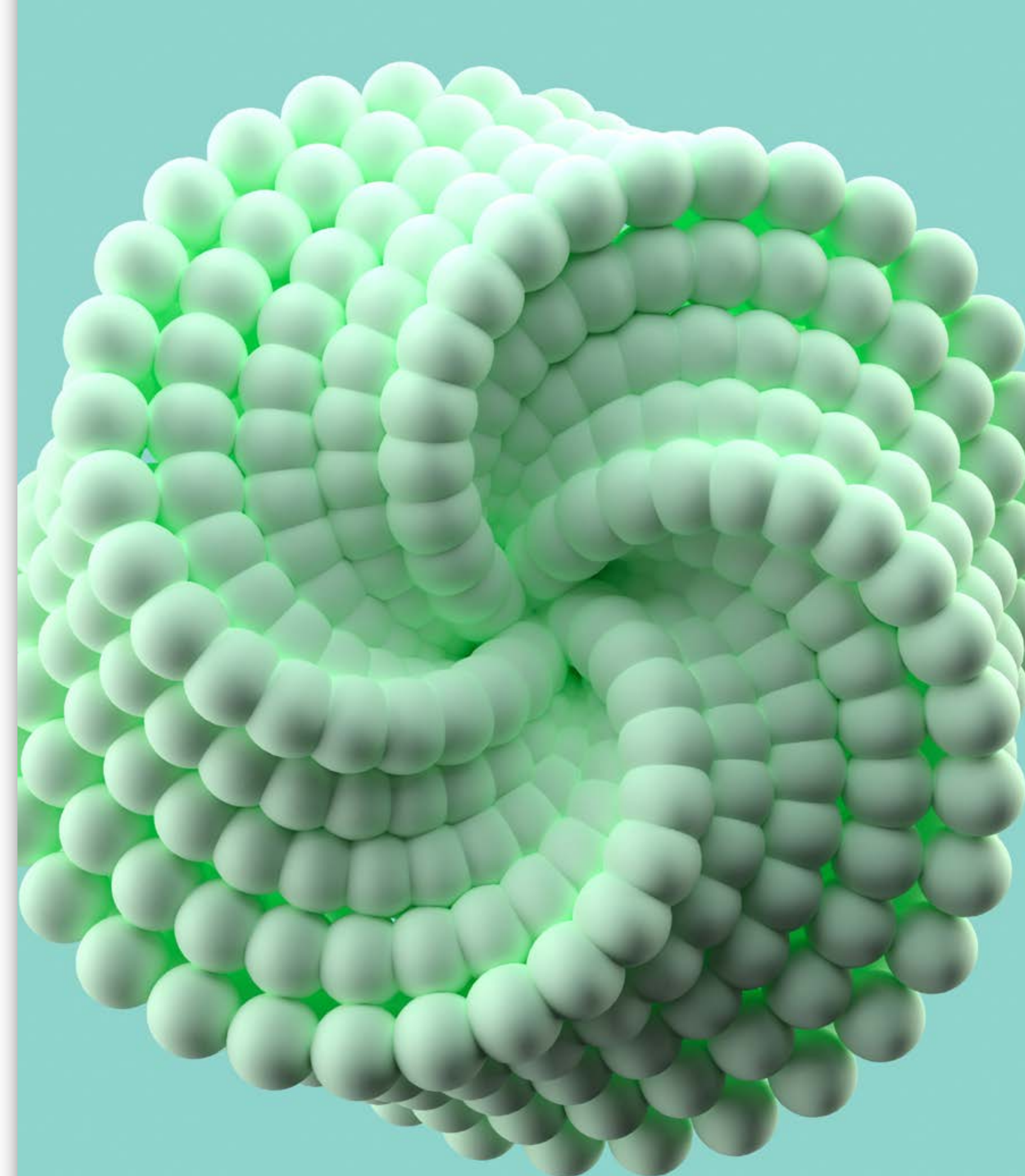## Sitecore DevOps maturity check (X5)

DevOps is important to Sitecore development and deployment productivity and quality. During this Activity, we help review your Sitecore DevOps maturity and identify areas of improvement to achieve the best development and deployment flows of your Sitecore environment.

Size	(12) Activity Points
Type	Check
Tasks	The Sitecore team will: • Review your overall DevOps design • Review local development flow and automation setup • Review continuous integration, continuous delivery (CICD) pipelines for builds and releases • Review Sitecore content serialization setup and deployments • Review the infrastructure provisioning approach • Review monitoring and logging setup with Sitecore applications and DevOps processes • Review automated testing setup if any
Prerequisites	Before the Activity begins, you must: • Provide documentation on DevOps designs • Provide access to solution source code • Provide access to DevOps systems • Provide access to Infrastructure platforms
Deliverables	We provide the following deliverable: • A maturity report on the tasks performed and recommendations
Guidelines	N/A

Sitecore® Helix practice check (X6)

Sitecore Helix is a collection of best practices and conventions for the solution architecture of Sitecore platform implementations. This Activity helps you review your adoption of best practices and conventions.

Size	(2) Activity Points
Type	Check
Tasks	The Sitecore team will: • Review solution setup according to Helix principles • Review Sitecore CMS setup according to Helix principles
Prerequisites	Before the Activity begins, you must: • Provide solution design documentation of the Sitecore platform • Provide access to solution source code • Provide admin access to the Sitecore back office of at least one of the Sitecore platform implementations • Customer solution must use .NET MVC in their solution. Other types of solutions (Webforms, Headless via JSS/Headless Services) are not eligible for this activity
Deliverables	We provide the following deliverable: • A report of the analysis and recommendations for action • No calls are included in this Activity
Guidelines	N/A

Sitecore security hardening check (X8)

During this Activity, we review your environment to ensure that all expected security hardening steps have been taken. This will provide reassurance that your security configuration is in excellent shape before going live.

Size	(4) Activity Points
Type	Check
Tasks	The Sitecore team will: • Review the security hardening on your Sitecore environment(s) • Provide feedback regarding the items checked and the result of the check
Prerequisites	Before the Activity begins, you must: • Provide infrastructure diagrams of the environment(s) under review • Provide the Sitecore version each environment is running on • Provide complete access to the infrastructure environment(s) under review and where Sitecore is installed and running, together with access to auxiliary infrastructure such as database servers and search servers • Provide administrative access to the Sitecore CMS login
Deliverables	We provide the following deliverable: • A brief report with findings and suggested next steps in accordance with Sitecore security hardening guidelines
Guidelines	Scope includes 1 Sitecore environment per Activity. Use of the security check and reliance thereon is at user's sole risk. The security check is provided on an "as is" basis. Sitecore makes no warranty of any kind whether express or implied, statutory or otherwise, including without limitation as to the results to be obtained from use of the security check, that the security check will be error-free, complete or accurate, any implied warranty of merchantability, fitness for a particular purpose, title, infringement, or otherwise. Neither Sitecore nor its affiliates nor subsidiaries will in any way be liable to user or any other entity or person for any inaccuracies, errors, omissions, delays, computer viruses, security breaches or other damages (whether direct or indirect), claims, liabilities or losses, regardless of cause, in or arising from the use of the security check.

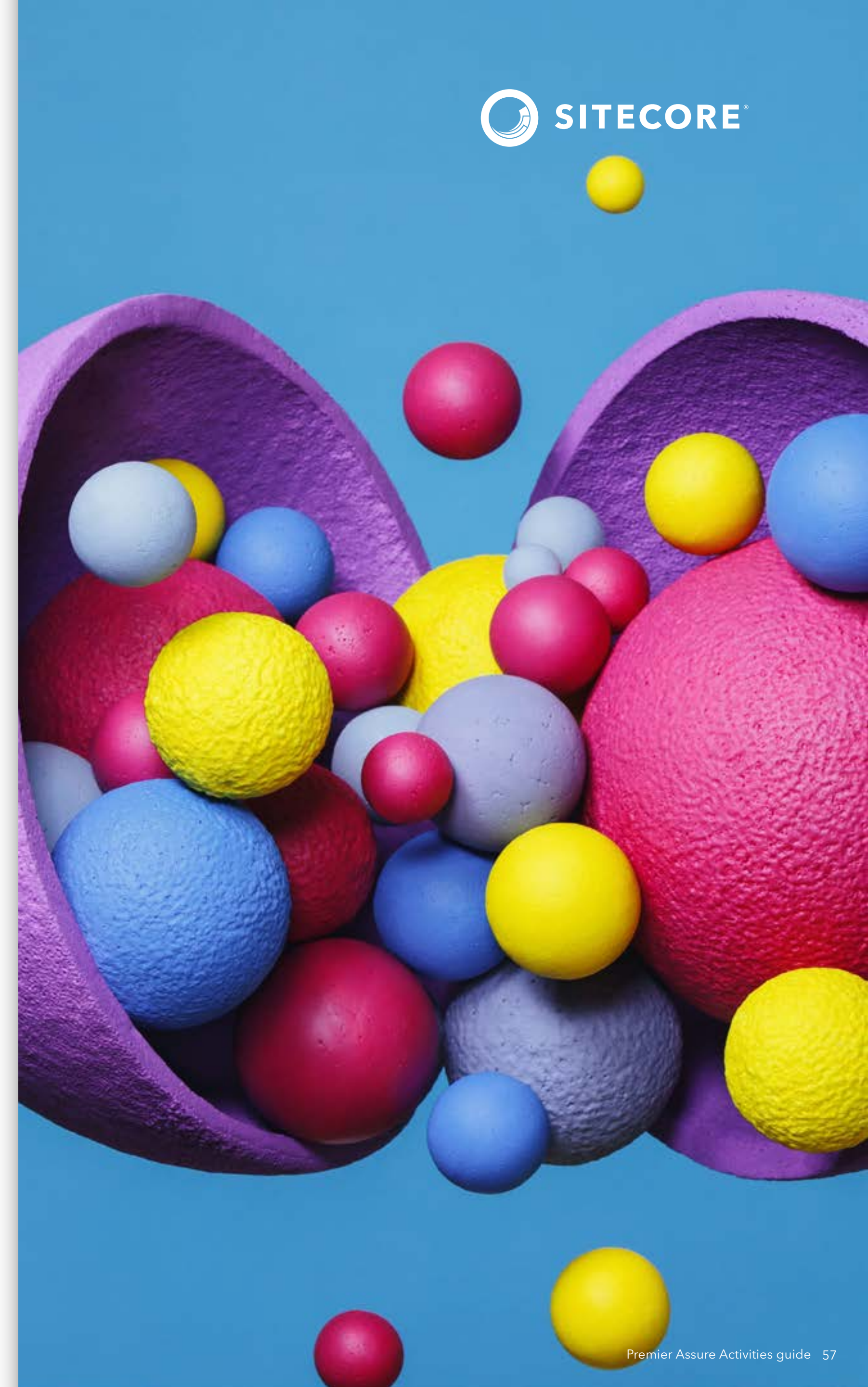## Sitecore version-specific vulnerabilities check (X9)

During this Activity, we examine your Sitecore environments to ensure that all known security vulnerabilities for the version(s) you are running have been addressed – offering peace of mind that you have taken all necessary security precautions.

Size	(4) Activity Points (for Sitecore 10.x) (6) Activity Points (for Sitecore versions older than 10.0)
Type	Check
Tasks	The Sitecore team will: • Review your Sitecore environment(s) for any known security vulnerabilities that affect the version installed • Provide feedback based on the result
Prerequisites	Before the Activity begins, you must: • Provide the Sitecore version each environment is running on • Provide infrastructure diagrams of the environment(s) under review • Provide complete access to the infrastructure environment(s) under review and where Sitecore is installed and running, together with access to auxiliary infrastructure such as database servers and search servers • Provide a list of installed Sitecore or third-party modules in the instance
Deliverables	We provide the following deliverable: • A brief report with findings and suggested next steps, which might include applying security hot fixes, disabling a vulnerable feature or component, or closing a vulnerable entry point
Guidelines	Scope includes 1 Sitecore environment per Activity. Use of the security check and reliance thereon is at user's sole risk. The security check is provided on an "as is" basis. Sitecore makes no warranty of any kind whether express or implied, statutory or otherwise, including without limitation as to the results to be obtained from use of the security check, that the security check will be error-free, complete or accurate, any implied warranty of merchantability, fitness for a particular purpose, title, infringement, or otherwise. Neither Sitecore nor its affiliates nor subsidiaries will in any way be liable to user or any other entity or person for any inaccuracies, errors, omissions, delays, computer viruses, security breaches or other damages (whether direct or indirect), claims, liabilities or losses, regardless of cause, in or arising from the use of the security check.

Sitecore log output sanitation check (X10)

The goal of this Activity is to determine whether you have sanitized your Sitecore log of critical or highly repeatable errors and to highlight those that are most prominent. We suggest changes to address the source of the errors. Logs free of erroneous entries allow you to spot real issues using your logs.

Size	(8) Activity Points
Type	Check
Tasks	The Sitecore team will: • Review your Sitecore logs for any important issues • Provide feedback based on the result
Prerequisites	Before the Activity begins, you must: • Provide the Sitecore version each environment is running on • Provide infrastructure diagrams of the environment(s) under review • Provide complete access to the infrastructure environment(s) under review and where Sitecore is installed and running, together with access to auxiliary infrastructure such as database servers and search servers • Provide administrative access to the Sitecore CMS login • Provide a list of installed Sitecore or third-party modules in the instance • Provide information about the configuration of current Sitecore logs, such as (1) verbosity, (2) log storage location (filesystem, storage account, log analytics, etc.), and (3) custom log files generated by Sitecore outside the default Sitecore installation • Enable Sitecore logging, with log verbosity set to "Informational" – independently of the storage medium where logs are located. If disabled, enable them a minimum pf 1 week before we start our investigation. Do this for every Sitecore role. For Sitecore xConnect and Identity Server roles, verbosity can stay at the Warning level.
Deliverables	We provide the following deliverable: • A report with findings and suggested next steps, including the most critical issues impacting performance, features, and security perceived via the logs. It will also highlight frequently repeated entries that clutter the logs and can be improved to achieve a healthier operation.
Guidelines	Scope includes 1 Sitecore environment per Activity.

Sitecore configuration files check (X11)

Properly managing your configuration changes will make future Sitecore version upgrades simpler and safer. In this Activity, we review the changes made to your Sitecore configuration files and advise changes that need to be made to your configuration change process or to fix changes already made.

Size	(4) Activity Points
Type	Check
Tasks	The Sitecore team will: • Review your Sitecore environment(s) for any configuration files from the vanilla Sitecore installation whose content was modified • Provide feedback based on the result
Prerequisites	Before the Activity begins, you must: • Provide the Sitecore version each environment is running on • Provide complete access to the infrastructure environment(s) under review, where Sitecore is installed and running, as well as access to auxiliary infrastructure such as database servers and search servers • Provide a list of Sitecore hot fixes or patches that were applied to the environment(s) • Provide information on the current deployment process • Provide source control access • Provide administrative access to the Sitecore CMS login
Deliverables	We provide the following deliverable: • A report with findings and suggested next steps. The report will include a list of all vanilla configuration files that were modified.
Guidelines	Scope includes 1 Sitecore environment per Activity.

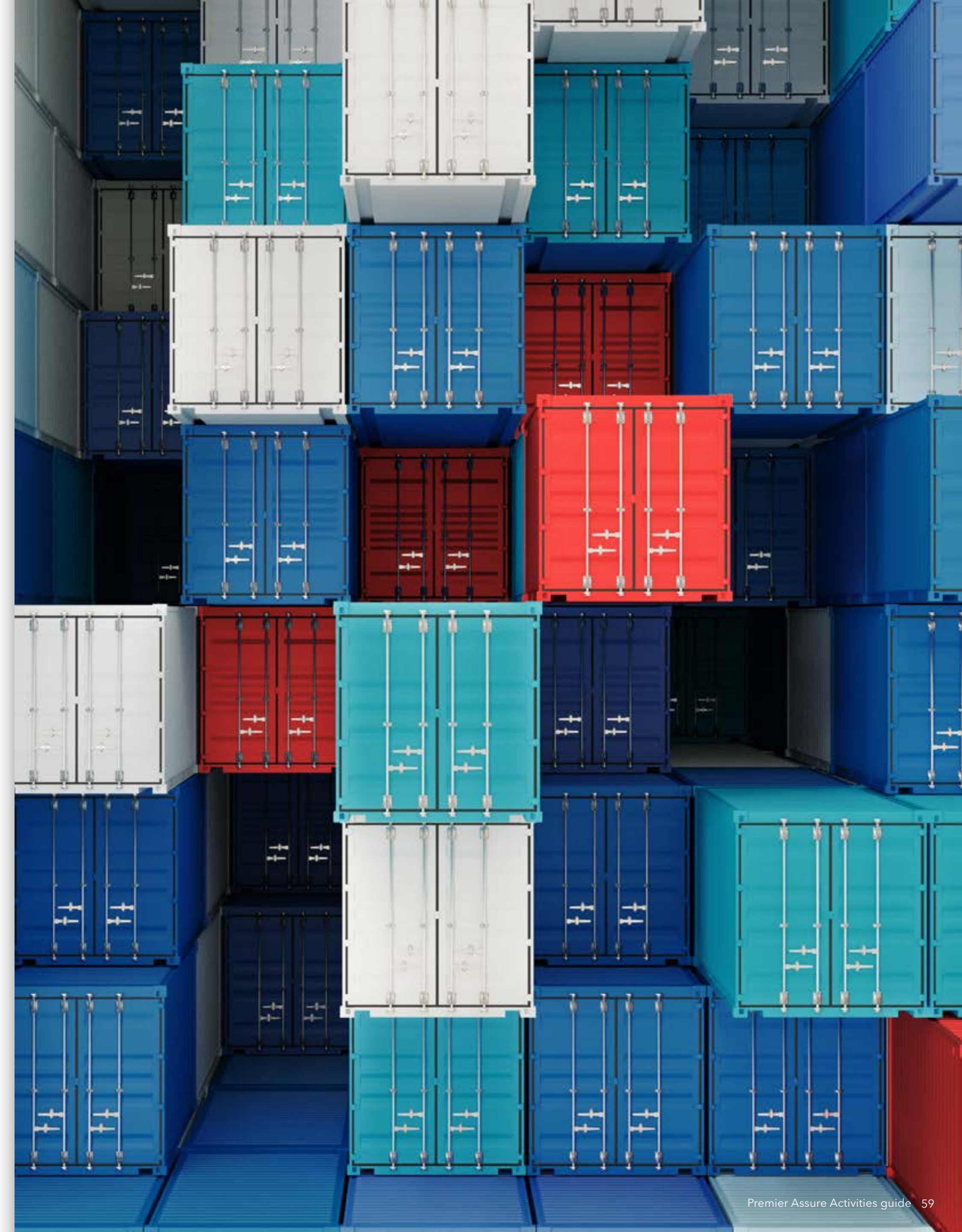## Headless (Vue, React, Angular) workshop (X12)

The workshop aims to provide both an overview and in-depth understanding of headless/JSS and its value. It provides a hands-on understanding of how to develop Sitecore solutions by completing JSS exercises. This Activity is delivered for either Edge/Vercel-, NextJS- or Vue/React/Angular-based solutions.

Size	(8) Activity Points
Type	Workshop
Tasks	The Sitecore team will prepare materials for the workshop and deliver the workshop.
Prerequisites	Before the Activity begins, you must: • A basic understanding of and experience with ReactJS • Local Sitecore 10 installation with valid/self-signed SSL certificate • Visual Studio code • License with Sitecore.JSS key • Node 10.15.3 (or newer) (LTS)
Deliverables	We provide the following deliverable: • A 12-hour workshop split into 1.5 or 3 half-days
Guidelines	N/A

Containers workshop (X13)

The workshop aims to provide both an overview and an in-depth understanding of containers/Dockers and the value they create.

Size	(8) Activity Points
Type	Workshop
Tasks	The Sitecore team will prepare materials for the workshop and deliver the workshop.
Prerequisites	Before the Activity begins, you must meet these requirements: • To run Docker on Windows 10, you will need Windows 10 Professional or Enterprise version 1809 (2019 LTSC) or later. To enable process isolation, version 1909 is recommended. • Hardware must first meet the requirements for running Hyper-V itself. For complete details, including how to verify compatibility, see Windows 10 Hyper-V System Requirements. • To summarize, Hyper-V requires a 64-bit processor with second-level address translation (SLAT) and hardware-assisted virtualization, at least 4GB of RAM (See below for Sitecore guidelines), and virtualization support turned on in the BIOS. In addition to the Hyper-V requirements, we make the following hardware recommendations for Sitecore development: • 6GB of RAM (minimum), 32GB of RAM (recommended) • A quad core or higher CPU • Approximately 50GB of free disk space for Sitecore container images **Note:** SSD storage is highly recommended for optimal performance when downloading and running Docker containers.
Deliverables	We provide the following deliverable: • A 12-hour workshop split into 1.5 days or 3 half-days
Guidelines	N/A

Cloud (Azure) security review (X14)

Running applications in the cloud can be quite secure, but there are many ways to inadvertently introduce security gaps as well as to add an extra layer of security. With the number of malicious actors on the rise, companies should aim for the highest level of security possible.

Size	(8) Activity Points
Type	Evaluation
Tasks	The Sitecore team will: • Check for security gaps in existing resources – for example, plain text connection strings; old, whitelisted Ips – and recommend changes to enhance security • Recommend any additional resources that could/should be added (KeyVault/WAF) and an approximate cost • Assess monitoring/maintenance for security gaps, for example, PII in logs, cert rotation • Assess role-based access control (RBAC)
Prerequisites	Before the Activity begins, you must: • Provide Contributor access to Azure subscriptions and resource groups • Provide current architecture diagram
Deliverables	We provide the following deliverables: • Recommended settings/config changes to secure existing resources • Recommended additional security resources and cost (from Azure pricing calculator) • Recommended process improvements • Updated architecture diagram • Export of users/roles and any recommendations (e.g., minimal number of admin users)
Guidelines	Use of the security check and reliance thereon is at user's sole risk. The security review is provided on an "as is" basis. Sitecore makes no warranty of any kind whether express or implied, statutory or otherwise, including without limitation as to the results to be obtained from use of the security review, that the security review will be error-free, complete or accurate, any implied warranty of merchantability, fitness for a particular purpose, title, infringement, or otherwise. Neither Sitecore nor its affiliates nor subsidiaries will in any way be liable to user or any other entity or person for any inaccuracies, errors, omissions, delays, computer viruses, security breaches or other damages (whether direct or indirect), claims, liabilities or losses, regardless of cause, in or arising from the use of the security review.

SEO report analysis (X15)

One of the critical elements of on-page SEO is the page's HTML. Tools and SEO checkers can report issues detected on the website but cannot analyze whether the root cause is code or content. This activity will review third-party SEO reports and provide quick wins in Sitecore.

Size	(2) Activity Points
Type	Optimization
Tasks	The Sitecore team will: • Analyze an SEO report you provide • Identify issues caused by website code and suggest improvements • Identify issues caused by human error • Consult with the content editors on resolving these issues
Prerequisites	Before the Activity begins, you must: • Generate and share an SEO report • Provide access to the CMS with administrator rights • Provide VPN access, if applicable
Deliverables	We provide the following deliverable: • A report feeding back on quick wins to fix SEO issues
Guidelines	• This activity covers 1 website only, with approximately 100 pages in the report. Additional volume will need to be discussed on request • In-house tools for SEO are not currently available so initially this activity should rely on your report • This report currently does not cover any Google Analytics tagging

SITECORE

Content migration readiness review (X16)

This Activity helps you plan your content migration to Sitecore by reviewing technical and marketing prerequisites. It includes a remote session as well as follow-ups with your implementation team.

Size	(10) Activity Points
Type	Workshop
Tasks	The Sitecore team will: • Review the existing content • Review the new design and user stories • Advise on best practices regarding sitemap, naming conventions, etc. • Assist in identifying shared content • Assist in identifying needs for new content
Prerequisites	Before the Activity begins, you must: • Provide access to the new UAT environment • Provide sitemap of the live site • Provide approved design
Deliverables	We provide the following deliverables: • Remote workshop (1-hour minimum via video call) • Custom content migration matrix/template
Guidelines	This is a nontechnical service conducted by a business consultant and may be presented in 2 sessions.

Sitecore® Experience Accelerator (SXA) Workshop (X17)

This workshop offers both an overview and in-depth understanding of Sitecore® Experience Accelerator (SXA), its value, and a hands-on understanding of how to develop Sitecore solutions by completing SXA exercises. It targets primarily back-end developers and solution architects but also covers how SXA integrates front-end development processes.

Size	(5) Activity Points
Type	Workshop
Tasks	Day 1 • What is SXA? (Introduction) • Architecture and core concepts • Multisite and tenants • Site creation • Presentation • Page and partial designs introduction • Components and variations • Variate components • Override the Vvew of an existing component • Rendering variants • Create a new component (clone) • Snippets Day 2 • Themes • Different types of themes • Creative exchange • Creative exchange live • Shared content and presentation • Master site concept • SXA modules • SXA out-of-the-box (OOTB) features • Performance and best practices

Prerequisites	• Basic understanding and experience with Sitecore
	• Local Sitecore 10.3 installation
	  – Additional modules to install include Sitecore Powershell Extensions 6.0 for XP 10.3 and SXA 10.3
	• A valid Sitecore license key including Sitecore SXA
	• Visual Studio Code
	• Find more information on SXA compatibility at:
	  – Sitecore: https://kb.sitecore.net/articles/087164
	  – SXA: https://kb.sitecore.net/articles/180187

Deliverables	We provide the following deliverable: • 2-day SXA workshop
Guidelines	N/A

Intro to Containers (X18)

This activity offers an overview of containers and orchestration with a focus on their value to Sitecore development and infrastructure teams. Specific coverage of Docker and Kubernetes/AKS concepts is included.

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will prepare and deliver the workshop.
Prerequisites	A basic understanding of Sitecore® Experience Manager™ and Sitecore® Experience Platform™ (XM/XP) and containers
Deliverables	We provide the following deliverable: • An overview of Sitecore XP and containers via a 1-hour (minimum) workshop
Guidelines	N/A

Introduction to headless (X19)

This Activity offers both an overview and an in-depth understanding of headless approaches and their value.

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will prepare and deliver the workshop.
Prerequisites	A basic understanding of Sitecore XM/XP and headless
Deliverables	We provide the following deliverable: • An overview of Sitecore and headless approaches via a 1-hour (minimum) workshop
Guidelines	N/A

Media Library evaluation (X21)

In this Activity, we review your media library folder structure and naming convention and suggest improvements. This reduces the risk of performance issues and ensures that nontechnical users are able to easily navigate to media items.

Size	(2) Activity Points
Type	Evaluation
Tasks	The Sitecore team will: • Review the media library folder structure • Review the media library naming convention • Suggest restructuring folders that exceed the recommendation of 100 items under a single node • Report validation errors, i.e., media items with missing alternatives, items exceeding certain size, etc. • Report unused items
Prerequisites	Before the Activity begins, you must: • Provide access to the relevant environment • Provide access to VPN/VDI • Provide information on the approved naming convention, if you have one
Deliverables	We provide the following deliverables: • Report containing action items per asset • A video call to review the report, discuss common mistakes, and recommend best practices
Guidelines	• Scope Includes 1 Sitecore environment per Activity

Use of rich-text editor review (X22)

In this Activity, we confirm that the rich-text editor does not use tables and inline styles to structure content – a practice that does not follow CMS or CSS recommended practices. Doing so ensures design consistency, compliance with approved brand guidelines, and your website's responsiveness.

Size	(2) Activity Points
Type	Review
Tasks	The Sitecore team will: • Search the environment for rich-text fields with undesired markup • Analyze where rich text is required for the look and feel of the page and where it can be removed • Suggest alternative solutions where applicable
Prerequisites	Before the Activity begins, you must provide access to the relevant environment
Deliverables	We provide the following deliverables: • Report containing action items per asset • A video call to review the report, discuss common mistakes, and recommend best practices
Guidelines	• Scope Includes 1 Sitecore environment per Activity • This is a nontechnical session conducted by a business consultant

DevOps review and optimization (X23)

Set yourself up for success with a review (optional) and documentation of your existing DevOps pipeline. We highlight potential improvements around build, deployment, and development.

Size	(24) Activity Points
Type	Optimization
Tasks	The Sitecore team will: • Review the current DevOps pipeline (optional) and introduce the project setup • Set up a technical target example use case • Understand project problems and blockers with deployment • Design a business target example "Deploy code updates multiple times a day" • Document existing processes, including architecture, development and deployment processes, and the tools used • Document proposed improvement options covering build, deployment, and development • Follow up with meetings to detail our suggestions and assist in the application of the proposed improvements
Prerequisites	Before the Activity begins, you must: • Provide access to technical people, developers, and system administrators to the solution/ development process, DevOps, and the system infrastructure • Provide access to the project owner to review project processes and business requirements • Provide architecture or infrastructure diagrams • Grant access to the code repository • Grant access to a development/staging/production environment with administrator rights
Deliverables	We provide the following deliverables: • Detailed documentation as a joint effort between Sitecore Services and the client team • Guidelines and high-level recommendations • Assistance with knowledge transfer and guidance to build your team's confidence with DevOps
Guidelines	N/A

Sitecore® XM SysAdmin workshop (X24)

This Activity quickly and effectively prepares your Sitecore environment to meet tomorrow's needs. It equips system administrators with the essential skills and knowledge necessary to manage the platform.

Size	(3) Activity Points
Type	Workshop
Tasks	The Sitecore team will: • Provide an overview of Sitecore's DXP approach • Highlight Sitecore important XM/XP features • Walk administrators through XM/XP from hosting and installation to operations • Discussion includes security, integrations, and updates
Prerequisites	Before the Activity begins, you must have a basic understanding of Sitecore XM/XP.
Deliverables	We provide the following deliverables: • A 4-hour Sysadmin workshop
Guidelines	N/A

Performance tuning (X25)

There are many ways to use Sitecore to tune XM/XP. In this Activity, Sitecore experts use domain knowledge and experience to identify performance bottlenecks and optimize the visitor experience.

Size	(12) Activity Points
Type	Optimization
Tasks	The Sitecore team will: • Enable component caching • Optimize pre-fetch cache • Check and tune cache sizes • Check server sizing and metrics and offer (auto-) scaling recommendations • Check Lighthouse score and implement recommendations • Enable Brotli compression • Determining whether CDN/Dianoga (or both) should be used to optimize images • Optimize Sitecore warm-up time • Identify poorly performing code and suggest improvements
Prerequisites	Before the Activity begins, you must: • Provide access to infrastructure • Provide admin access to Sitecore • Provide access to code base • Provide permission to run load tests
Deliverables	We provide the following deliverables: • Lighthouse scores before and after starting • Load test results before and after starting • List of changes • List of further suggested changes
Guidelines	N/A

Activities for Sitecore® XM Cloud

XM Cloud solution review (XMC1)

This activity thoroughly reviews your Sitecore website. Our experienced team performs a deep-dive analysis of your implementation across your solution, performance configuration, and security configuration.

Size	(12) Activity Points
Type	Evaluation
Tasks	The Sitecore team will: • Review one of your websites • Create a report detailing findings • Answer a single set of follow-up questions
Prerequisites	Before the Activity begins, you must: • Provide access to your XM Cloud project for the website being reviewed • Provide access to your Rendering Host setup (Vercel, .NET Core service etc) • Provide access to the solution code or a zip file of the solution
Deliverables	We provide the following deliverables: • A report describing our findings and recommendations. The report covers the following topics: 　– Solution review 　– Performance 　– Security 　– A single set of follow-up questions (answered by email)
Guidelines	Use of the security review and reliance thereon is at user's sole risk. The security review is provided on an "as is" basis. Sitecore makes no warranty of any kind whether express or implied, statutory or otherwise, including without limitation as to the results to be obtained from use of the security review, that the security review will be error free, complete or accurate, any implied warranty of merchantability, fitness for a particular purpose, title, infringement, or otherwise. Neither Sitecore nor its affiliates nor subsidiaries will in any way be liable to user or any other entity or person for any inaccuracies, errors, omissions, delays, computer virus, security breaches or other damages (whether direct or indirect), claims, liabilities or losses, regardless of cause, in or arising from the use of the security review.

Sitecore log output sanitation check (XMC2)

The goal of this activity is to determine whether you have sanitized your Sitecore log of critical or highly repeatable errors and to highlight those that are most prominent. We suggest changes to address the source of the errors. Logs free of erroneous entries allow you to spot real issues using your logs.

Size	(8) Activity Points
Type	Check
Tasks	The Sitecore team will: • Review your Sitecore logs for any important issues • Provide feedback based on the result
Prerequisites	Before the Activity begins, you must: • Provide infrastructure diagrams of the environment(s) under review • Provide complete access to the XM Cloud project under review, together with access to the developer container. • Provide a list of installed Sitecore or third-party modules in the instance (where applicable) • Provide information about the configuration of current Sitecore logs, such as (1) verbosity, (2) log storage location (filesystem, storage account, log analytics, etc.), and (3) custom log files generated by Sitecore outside the default Sitecore installation • Enable Sitecore logging enabled, with log verbosity set to "Informational" — independent of the storage medium where logs are located. If disabled, enable them a minimum of 1 week before we start our investigation. Do this for every Sitecore role. For Identity Server roles, verbosity can stay at the Warning level.
Deliverables	We provide the following deliverables: • A report with findings and suggested next steps, including the most critical issues impacting performance, features, and security perceived via the logs. It will also highlight frequently repeated entries that clutter the logs and can be improved to achieve a healthier operation.
Guidelines	Scope includes 1 Sitecore environment per activity.

Custom configuration files check (XMC3)

When developers make changes to their local installation, these will need to be deployed to XM Cloud. A quick validation of how the configuration has been put together and deployed, with feedback provided on how to improve it.

Size	(2) Activity Points
Type	Evaluation
Tasks	The Sitecore team will: • Review the custom configuration • Create a report detailing findings • Answer a single set of follow-up questions
Prerequisites	Before the Activity begins, you must: • Provide access to your XM Cloud project for the website being reviewed • Optional detail (even if high-level) of any known custom configuration put in place
Deliverables	We provide the following deliverable: • A report describing our findings and recommendations
Guidelines	This review is for 1 website only

SEO report analysis (XMC4)

One of the critical elements of on-page SEO is the page's HTML. Tools and SEO checkers can report issues detected on the website but cannot analyze whether the root cause is code or content. This activity will review third-party SEO reports and provide quick wins in Sitecore.

Size	(2) Activity Points
Type	Optimization
Tasks	The Sitecore team will: • Analyze an SEO report you provide • Identify issues caused by website code and suggest improvements • Identify issues caused by human error • Consult with the content editors on resolving these issues

Prerequisites	Before the Activity begins, you must:
	
	• Generate and share an SEO report
	• Provide access to the CMS with administrator rights
	  – Provide VPN access, if applicable
	  – Please make sure to elevate privileges to execute Powershell script as described here:
	    https://doc.sitecore.com/xmc/en/developers/xm-cloud/environment-variables.html

Deliverables	We provide the following deliverables: • A report providing feedback on quick wins to fix SEO issues
Guidelines	• This activity covers 1 website only, with approximately 100 pages in the report. Additional volume will need to be discussed on request • In-house tools for SEO are not currently available so initially this activity should rely on your report • This report currently does not cover any Google Analytics tagging

Synchronizing and Sitecore CLI Workshop (XMC5)

A walkthrough session detailing how to use the new Sitecore Command Line Interface, focusing on how to synchronize items between local and remote XM Cloud instances.

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Take your developer team through the steps on how to use the CLI
Prerequisites	N/A
Deliverables	We provide the following deliverable: • A 1-hour (minimum) video call session
Guidelines	None

Intro to Vercel & deploying to Vercel for XM Cloud (XMC6)

An introductory session on the capabilities and relationship between XM Cloud and Vercel, including detail on how to deploy the Next.js app to Vercel and configure webhooks.

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Take your developer team through the capabilities of Vercel with XM Cloud
Prerequisites	N/A
Deliverables	We provide the following deliverables: • A 1-hour (minimum) video call session
Guidelines	None

Sitecore Users / role review (XMC7)

A high-level review of how the team has secured the user-facing parts of XM Cloud as well as securing users, accounts, security roles, domains, and user access rights.

Size	(1) Activity Point
Type	Evaluation
Tasks	The Sitecore team will: • Review the users and security setup • Create a report detailing findings • Answer a single set of follow-up questions
Prerequisites	Before the activity begins, you must: • Provide access to your XM Cloud project for the website being reviewed
Deliverables	We provide the following deliverable: • A report describing our findings and recommendations
Guidelines	None

Intro to Containers (XMC8)

This activity offers both an overview and an in-depth understanding of containers/docker and their value.

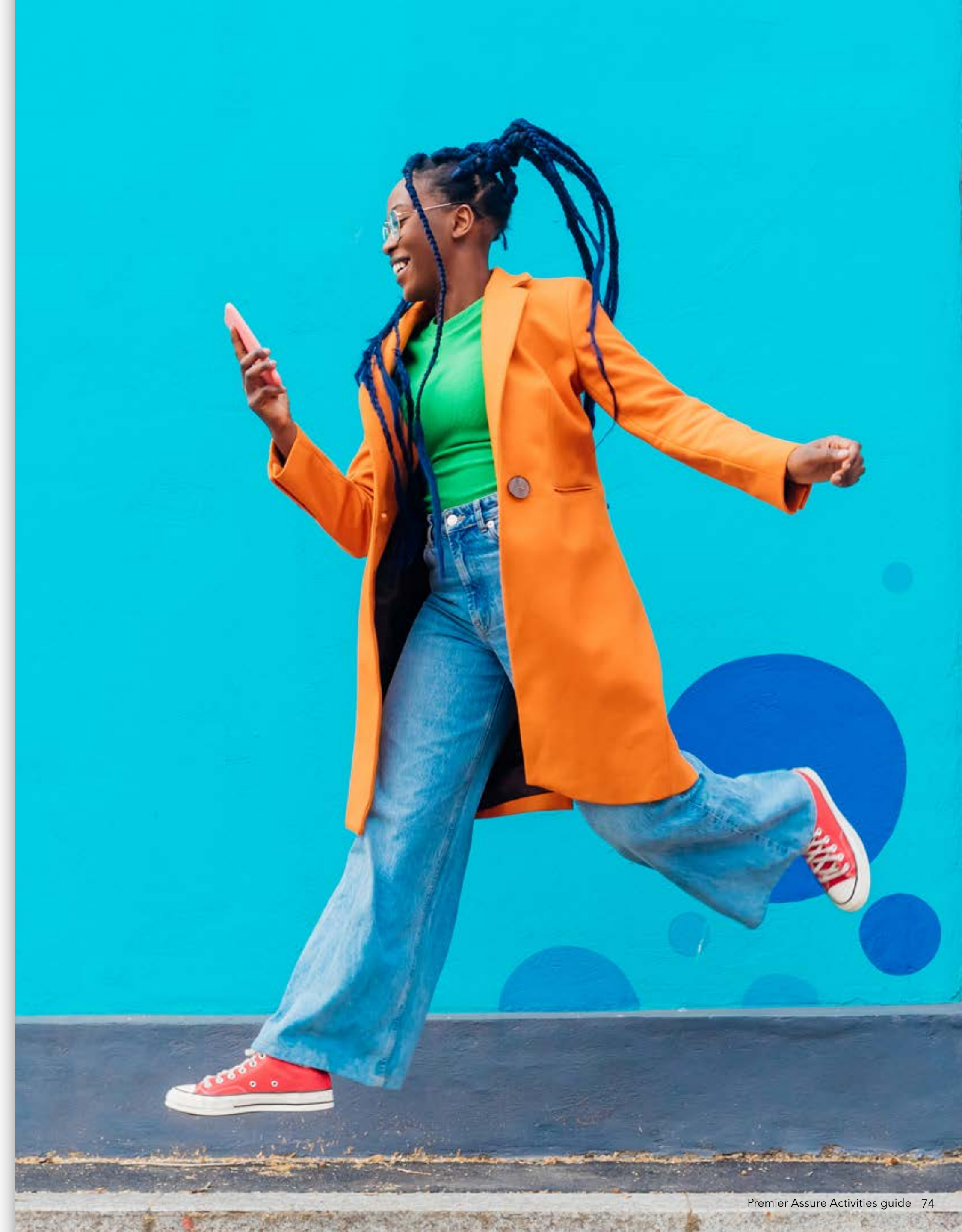| Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Prepare and develop the workshop
Prerequisites	Before the activity begins, you must: • Have a basic understanding of Sitecore Experience Cloud and containers
Deliverables	We provide the following deliverables: • A 1-hour (minimum) video call session giving an overview of Sitecore XM and containers
Guidelines	None

Intro to Headless (XMC10)

This activity offers both an overview and an in-depth understanding of headless approaches and their value.

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Prepare and develop the workshop
Prerequisites	Before the activity begins, you must: • Share audience number and roles • Have a basic understanding of Sitecore XM Cloud and Headless • Have completed Intro to XM Cloud activity • Have basic Frontend and Headless understanding
Deliverables	We provide the following deliverables: • A 1-hour (minimum) video call session giving an overview of Sitecore and headless approaches
Guidelines	None

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Headless workshop (XMC9)

This workshop offers an in-depth understanding of Headless Services for XM Cloud, including the use of Sitecore® Experience Accelerator (SxA). Through this hands-on workshop we will explain recommended practices and provide you a hands-on understanding of how to develop Sitecore solutions by completing exercises. It targets primarily web developers and solution architects with an understanding of how to integrate front-end development processes.

Size	(5) Activity Points
Type	Workshop
Tasks	The Sitecore team will: • Prepare and deliver the workshop
Prerequisites	Before the activity begins, you must have: • A basic understanding and experience with Sitecore and XM Cloud - if necessary attend XMC21 – Intro to XM Cloud • Sitecore XM Cloud access • Valid Sitecore license key including Sitecore SxA • Visual Studio Code with a local setup (detail will be provided ahead of workshop)
Deliverables	We provide the following deliverable: • A 2-day SXA workshop
Guidelines	• Workshop will be delivered with Next.JS

Media library evaluation (XMC11)

In this activity, we review your media library folder structure and naming convention and suggest improvements. This reduces the risk of performance issues and ensures that nontechnical users are able to easily navigate to media items.

Size	(2) Activity Points
Type	Evaluation
Tasks	The Sitecore team will: • Review the media library folder structure • Review the media library naming convention • Suggest restructuring folders that exceed the recommendation for limitation of 100 items under a single node • Report validation errors, i.e., media items with missing alternatives, items exceeding certain size, etc. • Report unused items
Prerequisites	Before the activity begins, you must: • Provide access to the relevant environment
Deliverables	We provide the following deliverables: • Report containing action items per asset • A video call to review the report, discuss common mistakes, and best practices
Guidelines	• Scope Includes 1 Sitecore environment per activity • This is a nontechnical session conducted by a business consultant

Use of rich-text editor review (XMC12)

In this activity, we validate that the rich-text editor does not use tables and inline styles to structure content — which does not follow CMS or CSS recommended practices. Doing so ensures design consistency, compliance with approved brand guidelines, and your website's responsiveness.

Size	(2) Activity Points
Type	Review
Tasks	The Sitecore team will: • Search the environment for rich-text fields with undesired markup • Analyze where rich text is required for the look and feel of the page and where it can be removed • Suggest alternative solutions where applicable
Prerequisites	Before the activity begins, you must: • Provide access to the relevant environment • Please make sure to elevate privileges to execute Powershell script as described here: https://doc.sitecore.com/xmc/en/developers/xm-cloud/environment-variables.html
Deliverables	We provide the following deliverables: • Report containing action items per asset • A video call to review the report, discuss common mistakes, and best practices
Guidelines	• Scope Includes 1 Sitecore environment per activity

SITECORE®

DevOps review & optimization (XMC13)

Set yourself up for success with a review (optional) and documentation of your existing DevOps pipeline. We highlight potential improvements around build, deployment, and development.

Size	(24) Activity Points
Type	Optimization
Tasks	The Sitecore team will: • Review the current DevOps pipeline (optional) and introduce the project setup • Understand project problems and blockers with deployment • Document existing processes, including architecture, development, and deployment processes, and the tools used • Document proposed improvement options covering build, deployment, and development improvements • Follow up with meetings to detail our suggestions and assist in the application of the proposed improvements
Prerequisites	Before the activity begins, you must: • Provide access to technical people, developers, and system administrators to the solution/development process, DevOps, and the system infrastructure • Provide access to the project owner to review project processes and business requirements • Grant access to the code repository
Deliverables	We provide the following deliverables: • Detailed documentation as a joint effort between Sitecore Services and the client team • Guidelines and high-level recommendations • Assistance with knowledge transfer and guidance of your team to build your confidence in DevOps
Guidelines	None

Performance tuning (XMC14)

There are many ways to use Sitecore to tune the performance. In this activity, Sitecore experts use domain knowledge and experience to identify performance bottlenecks and optimize the visitor experience.

Size	(12) Activity Points
Type	Optimization
Tasks	The Sitecore team will: • Review component caching • Review pre-fetch cache • Check and tune cache sizes • Check server sizing and metrics and offer (auto-) scaling recommendations • Check Lighthouse score and implement recommendations • Review compression • Review Sitecore warmup time • Identify poorly performing code and suggest improvements
Prerequisites	Before the activity begins, you must: • Provide access to your XM Cloud project for the website being reviewed. • Provide access to your Rendering Host setup (Vercel, .NET Core service etc). • Provide access to the solution code or a zip up the solution to share
Deliverables	We provide the following deliverables: • Lighthouse scores before and after starting • List of changes • List of further suggested changes
Guidelines	None

Sitecore cache configuration check (XMC15)

You should optimize the configuration and sizing of your cache settings to maximize the performance of your websites. In this activity, we review your setup and offer recommendations to optimize your cache configuration.

Size	(4) Activity Points
Type	Check
Tasks	The Sitecore team will: • Review your Sitecore cache usage • Provide feedback based on the result • Do a second review after you have applied the cache recommendations • Provide feedback based on the result
Prerequisites	Before the activity begins, you must: • Provide complete access to the XM Cloud under review. • Provide administrative access to the Sitecore CMS login • Have enabled Sitecore logs to at least Warning level on the principal Sitecore roles – Standalone, CM, CD – for the environment(s) under review • Provide access to Sitecore logs if they are stored outside the Sitecore infrastructure
Deliverables	We provide the following deliverables: • A report with findings and suggested next steps to increase or decrease cache sizes for different Sitecore components • A second report – if a second review is done after you have applied the suggestions from the first report – that outlines further steps in reconfiguring cache sizes
Guidelines	• Scope Includes 1 Sitecore environment per activity • This is a nontechnical session conducted by a business consultant

Intro to GraphQL (XMC17)

An introductory workshop to the basics of how to use and extend GraphQL in Experience Edge.

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Take your developer team through the basics of GraphQL
Prerequisites	N/A
Deliverables	We provide the following deliverables: • A 1-hour (minimum) video call session
Guidelines	None

Personalize in XM Cloud (XMC18)

An introduction session on the new embedded Personalization experience including building web pages with layouts and content customizations for different audiences.

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Take your developer team through setting up Personalization experiences in XM Cloud
Prerequisites	N/A
Deliverables	We provide the following deliverables: • A 1-hour (minimum) video call session
Guidelines	None

Intro to XM Cloud Pages (XMC19)

An introduction to the new content editing features, through this session we will edit content and drag-and-drop components on the canvas to create layouts with XM Cloud Pages.

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Take your team (technical and non-technical) through using Pages
Prerequisites	N/A
Deliverables	We provide the following deliverables: • A 1-hour (minimum) video call session
Guidelines	None

Intro to XM Cloud Developer Workflow (XMC20)

A workshop that will detail the differences between local development and development on the Edge with Docker. Using Sitecore's own Introduction Repository we will go through the development steps.

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Take your developer team through the developer workshop for XM Cloud
Prerequisites	Before the activity begins, you must make sure the attendees have: • Basic development understanding • Basic Frontend and Headless understanding • Basic .Net core understanding if used • Basic Sitecore development experience • Basic Docker or container understanding
Deliverables	We provide the following deliverables: • A 1-hour (minimum) video call session giving an overview of the Development Workflow for XM Cloud
Guidelines	None

Intro to XM Cloud (XMC21)

An introduction to XM Cloud and all its features. This is a beginner's session that will cover details of XM Cloud's capabilities and tools, including Explorer & Pages.

Size	(1) Activity Point
Type	Workshop
Tasks	The Sitecore team will: • Present XM Cloud and its features via a video call • Suggest other Assure Activity workshops that may be of benefit to the customer. • Answer any questions you may have
Prerequisites	Before the activity begins, you must: • Share number of attendees and their roles Audience must have a: • Basic development understanding • Basic Frontend and Headless understanding • Basic .Net core understanding (if used) • Basic Sitecore development experience • Basic Docker or container understanding
Deliverables	We provide the following deliverables: • A 1-hour (minimum) video call session introducing you to XM Cloud
Guidelines	This is an entry level workshop - consider more advanced workshops if your developers are experienced.

How to leverage personalization in XM Cloud for the marketer (XMC22)
In this session, we will collaboratively work together to define Audiences that align to your business and plan personalization leveraging the OOTB conditions and page variants. Behavior-based personalization can be one of the easiest and most impactful ways to deliver a 1:1 experience for a customer.

| Size	(2) Activity Points
Type	Optimization
Tasks	The Sitecore team will: • Take your team through what audiences are and how journey behavior can be used across the site to identify and deliver personalization
Prerequisites	None
Deliverables	We provide the following deliverables: • A 4-hour remote workshop (can be split into 2-2hr sessions) • Miro screenshots added to presentation • Presentation deck based on topic • Initial high-level personalization plan
Guidelines	None

Activities for Sitecore XP

Optimization readiness checklist (XP1)

The Optimization Readiness Checklist is a guiding framework used to ensure customizations or technical oversights are not blocking the set-up of personalization, reporting of analytics, and the launch of tests in Sitecore instances. Commonly referred to as the marketing "scan check," this process has been used across various industries and unique implementations of Sitecore XP.

Size	(1) Activity Point
Type	Workshop
Tasks	The Optimization Readiness Checklist is a guiding framework used to ensure customization or technical oversight is not blocking the setup of personalization, reporting of analytics, and launch of tests in Sitecore instances. Commonly referred to as the marketing "scan check," this framework has been used across industries and unique implementations of Sitecore Experience Platform™ (XP).
Prerequisites	Before the Activity begins, you must: • Identify the marketing team member who has access to these applications
Deliverables	We provide the following deliverables: • A 2-hour video call where feedback and advice will be provided • Checklist completed by the business consultant
Guidelines	This session focuses on the nontechnical aspects of personalization and analytics and helps verify that out-of-the-box (OOTB) XP core functionality works from the marketing perspective.
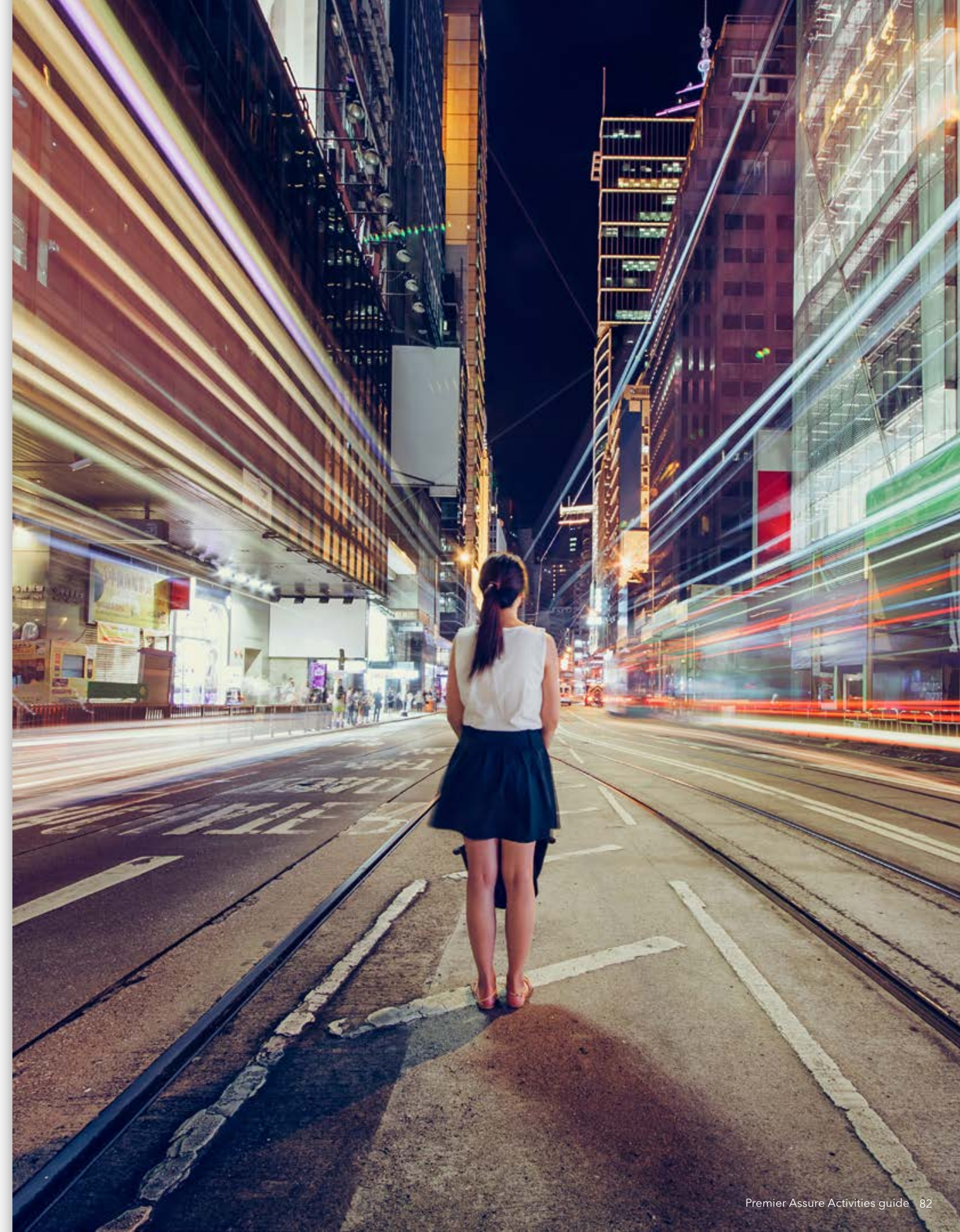
Understanding the marketing control panel – MCP (XP2)

In this session, we will go through the basic data point configuration a marketer can leverage to drive success using Sitecore XP to identify and optimize the customer journey.

Size	(1) Activity Point
Type	Optimization
Tasks	The Sitecore team will: • Take your team through the Marketing Control Panel (MCP) and identify where the most value can be generated and how the team can own their own success in the tool
Prerequisites	None
Deliverables	We provide the following deliverables: • A 1-hour video call where feedback and advice will be provided • Presentation deck based on topic
Guidelines	None

Goals and engagement value (XP3)

In this session, we will discuss how Sitecore defines goals and how using them with engagement values can create trigger points not only for personalization, but for identifying valuable paths customers take that can lead to high value conversion.

Size	(1) Activity Point
Type	Optimization
Tasks	The Sitecore team will: • Take your team through what goals are and how engagement value can be used across the site to identify and deliver optimization
Prerequisites	None
Deliverables	We provide the following deliverables: • A 1-hour video call where feedback and advice will be provided • Presentation deck based on topic
Guidelines	None

Predictive profiling for segments/personas (XP4)

In this session, we will cover how Sitecore defines Segments/Personas and how you can use them for predictive personalization. Behavior-based personalization can be one of the easiest and most impactful ways to deliver a 1:1 experience to a customer.

Size	(1) Activity Point
Type	Optimization
Tasks	The Sitecore team will: • Take your team through what profiles and patterns are and how journey behavior can be used across the site to identify and deliver optimization
Prerequisites	None
Deliverables	We provide the following deliverables: • A 1-hour video call where feedback and advice will be provided • Presentation deck based on topic
Guidelines	None

How to leverage sitecore campaigns (XP5)

In this session, we will explain how Sitecore provides a way to capture incoming traffic, identify and leverage categorization, and then personalize based on campaign inclusion. Sitecore Campaigns can be an easy way to trigger a personalization when leveraging companion tools like email, social media, and offline sources.

Size	(1) Activity Point
Type	Optimization
Tasks	The Sitecore team will: • Take your team through what Sitecore Campaigns are and how identifying a set of incoming traffic can be used across the site to identify and deliver optimization
Prerequisites	None
Deliverables	We provide the following deliverables: • A 1-hour video call where feedback and advice will be provided • Presentation deck based on topic
Guidelines	None

Experience analytics and understanding value (XP6)

In this session, we will go through how Sitecore enables the marketing team with OOTB reports that help inform data-based decision making for personalization opportunities.

Size	(1) Activity Point
Type	Optimization
Tasks	The Sitecore team will: • Take your team through what reports are available OOTB and which ones can be used to quickly identify opportunities across the site to deliver optimization
Prerequisites	None
Deliverables	We provide the following deliverables: • A 1-hour video call where feedback and advice will be provided • Presentation deck based on topic
Guidelines	None

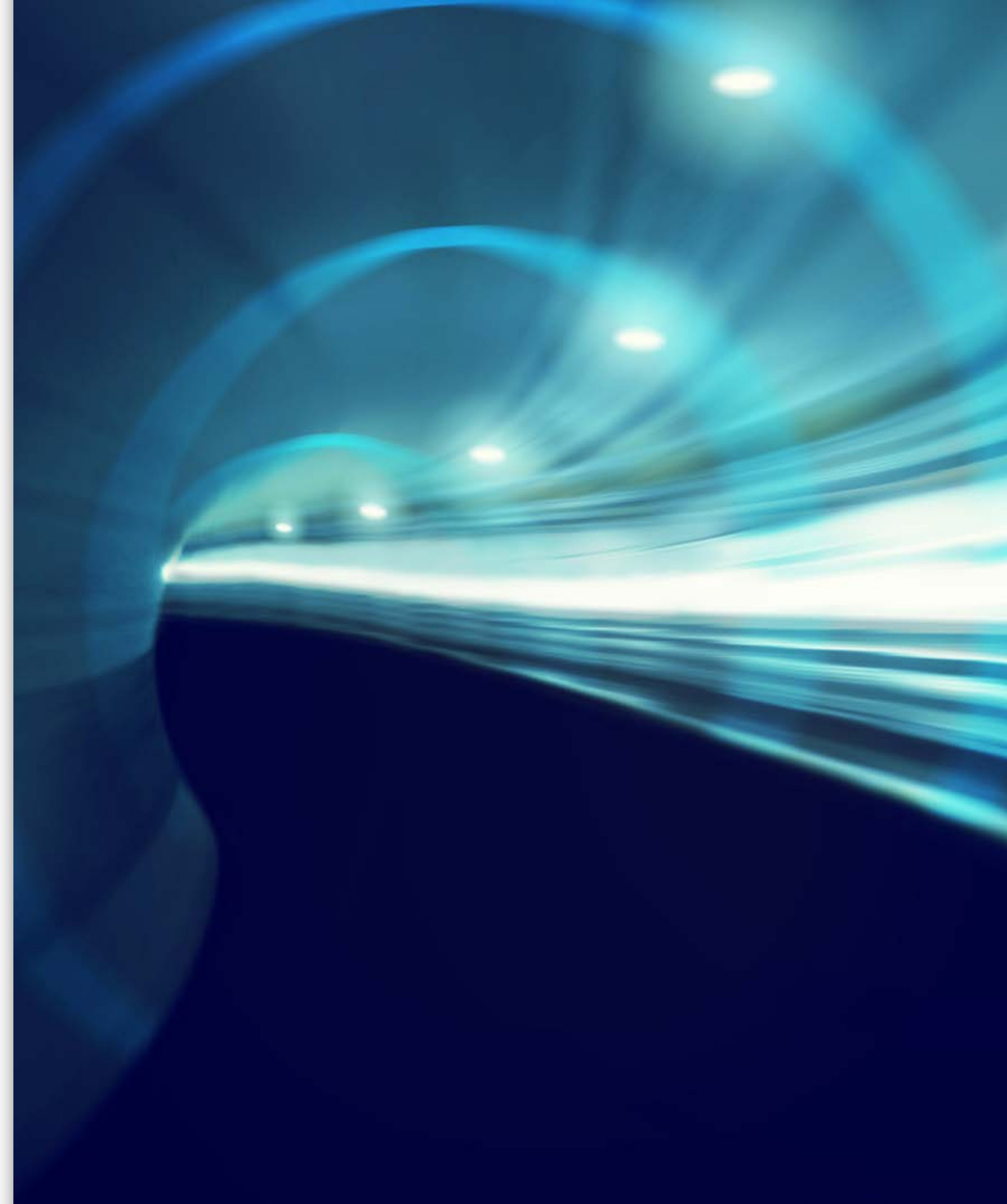## How to plan and launch optimization in sitecore XP (XP7)

In this mini workshop, we will discuss how Sitecore proposes marketing teams leverage the information they have in Sitecore to start to ideate, plan, and deliver an optimization program that strategically aligns to their business goals.

Size	(2) Activity Points
Type	Optimization
Tasks	The Sitecore team will: • Take your team through how we create and align digital goals to company objectives, ideate and prioritize segments/persona groups, ideate and plan personalization tactics with dependencies identified, and based on the above, call-out where the quick wins are that can drive quick and valuable successes
Prerequisites	Before the activity begins, you must: • Complete the above 5 Assure Activities (XP3 – XP7) • Have created an Optimization Readiness Checklist
Deliverables	We provide the following deliverables: • A 4-hour video call where feedback and advice will be provided • Presentation deck based on topic • Initial high-level personalization plan
Guidelines	None

Understanding the customer journey through Path Analyzer (XP8)
In this session, we will explain how Sitecore helps the marketer to derive valuable insights from the customer journey. We will look at the average value per visit and how it can be used to identify opportunities to re-enforce an already valuable journey or improve customer journeys that are facing hurdles.

Size	(1) Activity Point
Type	Optimization
Tasks	The Sitecore team will: • Take your team through what Path Analyzer is and how engagement value when leveraged, can be used across the site to identify customer journeys and delivery optimization where impactful and relevant
Prerequisites	None
Deliverables	We provide the following deliverables: • A 1-hour video call where feedback and advice will be provided • Presentation deck based on topic
Guidelines	None

SITECORE®

About Sitecore

Sitecore is the leading provider of end-to-end digital experience software. Unifying data, content, commerce, and experiences, our SaaS-enabled, composable platform empowers brands like L'Oreal, Microsoft, United Airlines, and PUMA to deliver unforgettable interactions across every touchpoint. Our solution provides the cutting-edge tools brands need to build stronger connections with customers, while creating content efficiencies to stand out as transformation and innovation leaders.

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