# Present Relevant Content Based on Funnel Stage

This playbook looks at how to set up an Evergage campaign that helps to move prospects through your sales cycle. By showing the right content at the right time, you can take prospects through your site and get them to convert earlier. This specific example uses static content added to a message, but you could also use Recommendations to present machine learning based content, as long as it is tagged as Top, Middle or Bottom of funnel.

Category	Recommendations	Vertical	Demand Generation
Topic	Drive prospects through the sales funnel by presenting them with funnel-based content based on their interactions with your site	ID #	362

Example

Before we can show progressive content, the user first needs to develop an affinity for a category or product. Once it has been identified then the user is presented with content at the top of the funnel such as a webinar recording or a white paper related to that topic. Given their affinity there is a higher likelihood that they would consume the content.
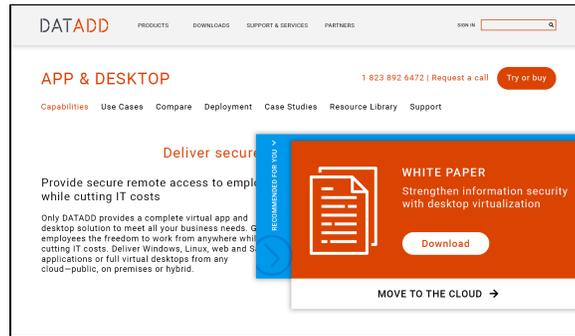
Once they have viewed the first article the message changes, and this time contains content that would be considered 'middle of the funnel' such as a case study to help the user validate their decision.

Finally, having consumed the middle of the funnel content, you could present bottom of the funnel content, such as an ROI calculator for your product, or a tech integration document.
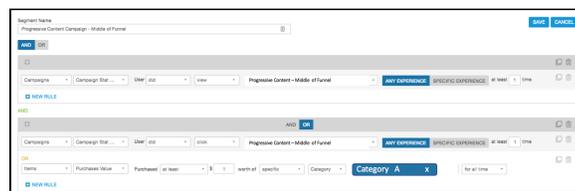

Segment

There are a few segments at play here. Firstly you need a segment that has the 'favorite' affinity based on their category or product consumption, and notes that they have not downloaded any content up to this point (so we don't have an email address for them).
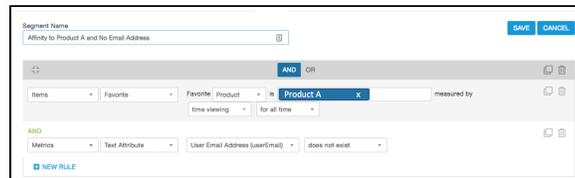
For the second experience, you would want to segment people who saw the first message, and either clicked on it, or have downloaded a similar piece of content. (note in this case, we are tracking downloads as a purchase)
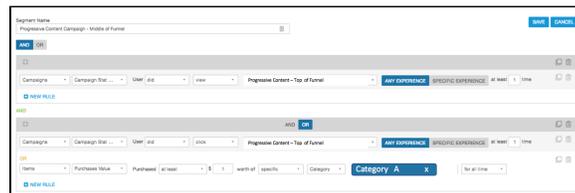
Finally, for the bottom of the funnel experience you should look for people who have seen the second experience, and clicked it or downloaded a similar piece of content.

Measure

To measure the success of this campaign, add global goal segments that cover things like downloaded a white paper, downloaded a ROI calculator, and additional actions you want to measure.

To measure the specifics of a particular campaign, create a global goal that is 'downloaded webinar A', or 'downloaded Case Study Y'. This would give you a direct correlation between the campaign you have run, and whether they content was downloaded.

Setup

Process

Here is a checklist of what you need to do in Evergage to create this play on your own site:

1. Understand the key category affinities you want to target
2. Build segments based on those affinities
3. Create the second and third level segments
4. Create a campaign. Some ways to do that include:
   a. One campaign, with an experience for each affinity and funnel stage (typically used when you have 2-3 key categories)
   b. One campaign per affinity, and an experience for each funnel stage
   c. One campaign for each funnel stage and each has an experience based on the affinity
5. Test and publish

Reference Materials

The following articles from the *Evergage Knowledge Base* will provide process steps to help you execute this play:

- Segments
- Create or Edit a Web Campaign
- Test and Publish a Campaign