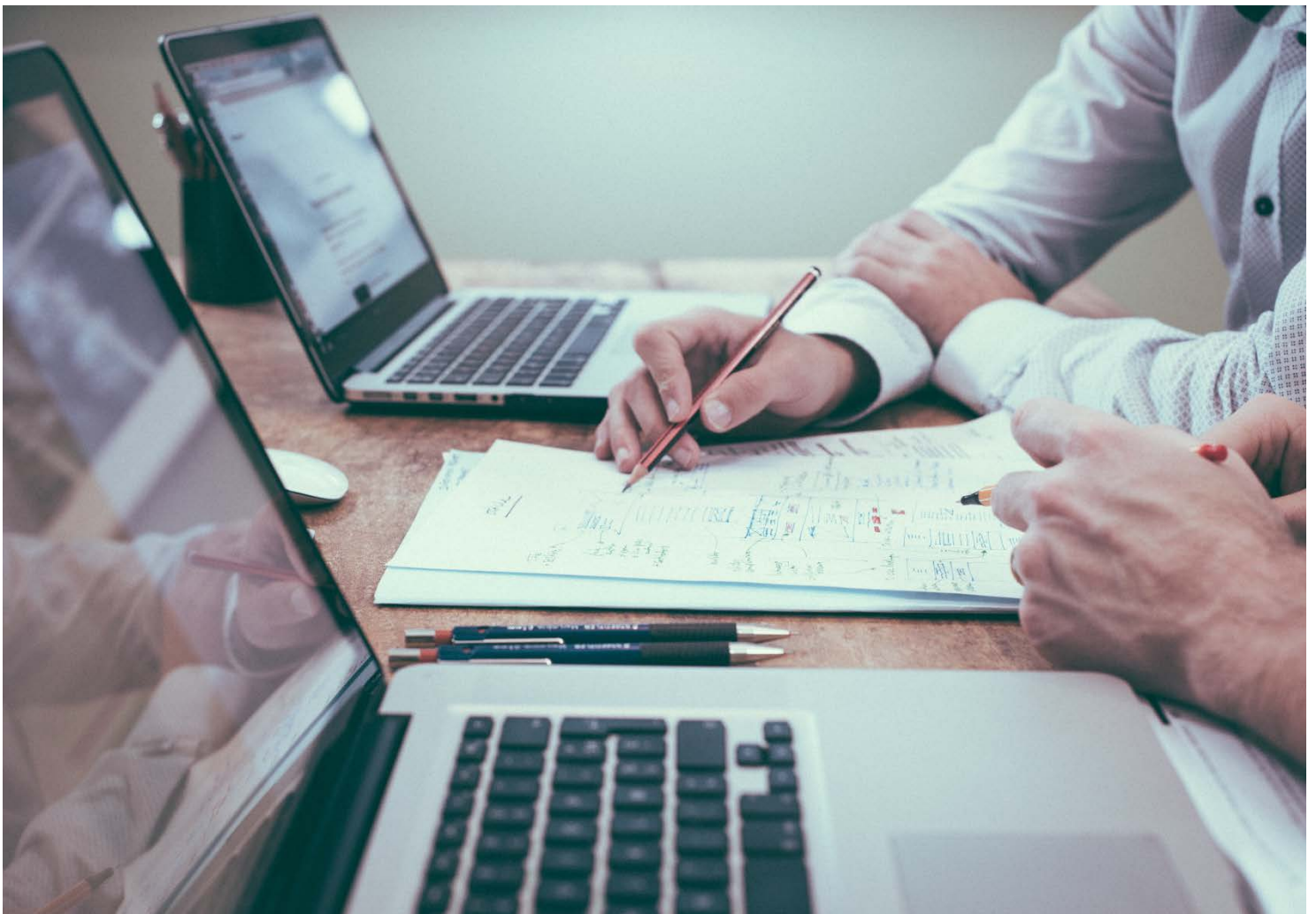


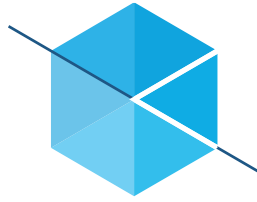


**EX<sup>2</sup>SOLUTIONS**  
digital transformation partners

## Sitecore Best Practices Audit

*Advance website productivity and secure a robust stable solution*





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## 1 WHY SITECORE?

In order for a business to make a strategic impact, it must first identify its customers and then be willing to adapt to those customer's wants and needs. One of the best channels to engage consumers is via a company website. It is not only a gateway but also a revenue generating tool, which is why an exceptional website is pertinent in increasing and maintaining business

Sitecore encompasses these tools in one powerful framework, syncing the power of personalization with conversion management. It brings everything together in one system.

## 2 HOW CAN I BENEFIT?

The decision to implement a large-scale content management system may be a valuable asset to your company. However, if your implementation isn't living up to expectations, or you still have a lot of lingering questions and concerns, an audit may be beneficial. Simply having all of the information within Sitecore does not guarantee it will be leveraged in the best way possible, and even if the system may appear to be running accurately, there may be some defects hiding beneath the surface.

There are limitless possibilities with the robust and flexible framework if executed utilizing best practices. If not, and shortcuts were taken during the implementation process, beware. Features may be unusable and lead to issues with future modifications.

# WE BUILD TECHNOLOGY THAT GETS RESULTS

- ✓ World class web & mobile apps
- ✓ Fixed price software development
- ✓ Candid, no-B.S. project leadership
- ✓ Client-focused for lower costs



A third party audit will determine if architecture and deployment have been properly implemented, along with identifying if best practices are being utilized. By mitigating performance risk and preserving upgrade paths, we can deter any forthcoming obstacles.

If you are unclear about any of the following items, we provide mentoring expertise to aid you throughout the process and make sure you feel comfortable with these processes in the future.

- Modifying content items within the Content Editor
- Configuring Web Forms for Marketers
- Personalizing content and making sense of personas
- Creating microsites
- Defining analytics that work you
- Importing/exporting data
- Adding and modifying users and their permissions
- Managing email campaigns
- Improving site search

# BEYOND SITECORE

We believe your digital presence must be more than just a website for your business to thrive. We've extended the reach of Sitecore to CRM integrations with Siebel, Salesforce, and Dynamics CRM to keep the dialog with the customer going.

## 3 THE AUDIT PROCESS

The best practices audit process will consist of three steps: an analysis of the current Sitecore CMS and configuration state, an executive report of our findings, and a discussion to review recommendations. Within the report, we shall assess implementation, highlight issues, and outline a remediation plan to resolve trouble areas. We will determine if there are any gaps within implementation and investigate potential bugs.



The detailed assessment will help determine the current state of the system and next steps. A priority value will be assigned to each finding, with findings scored based upon vulnerability.

<b>None</b>	Item is of no concern
<b>Low</b>	Item is of little concern but should be addressed
<b>Medium</b>	Item may become more severe and should be addressed
<b>High</b>	Item is of major concern and needs to be addressed

# DIGITAL EVOLUTION

Today, businesses must adapt if they are to survive. By intertwining technology and human intervention, companies may reap maximum benefits.

The following items shall be reviewed during the audit:



## CONTENT STRUCTURE, SORTING AND EXPERIENCE

Examine templates and hierarchy, media items, presentation components, and module installations

### Indicators:

- Pages, images, and/or forms do not appear as expected on your site
- You are unsure how to organize the content tree and manage templates
- You are wary of installing or uninstalling modules and/or packages



## SITE PERFORMANCE

Assess configuration, load testing, and errors and error handling

### Indicators:

- Your Sitecore CMS is running slow
- You would like to modify how errors are handled and error pages are displayed
- You need help configuring and maintaining databases

## EXPERIENCED TEAMS

Unlike “web design” agencies, our staff typically have over 10 years’ experience in their field – and many have double that amount. In addition, our management staff has been stable since our company’s beginnings. This results in well designed, dependable technology solutions for our clients.



### CONTENT SECURITY

Evaluate source code architecture along with role security

#### Indicators:

- Your Sitecore version is outdated and causing security flaws (i.e. easy access to administrative forms and debug tools)
- You would like to modify roles, users, and access rights
- You need to add security accounts to a domain

Health checks may be performed at any point throughout the deployment process, whether it’s mid-implementation or after all installations and configurations are in place. Our Sitecore Certified Developers, Architects, and Support Engineers will review site stability and ensure that the site is fully supporting the objectives of your business. After the audit has been conducted, if you feel as though you need extra guidance and support, our EX Squared team members will happily assist in making you feel comfortable with the system. With the right tools and the essential elements in place, we want to reassure you that Sitecore success is possible.

# CANDID DISCUSSIONS ARE OUR SPECIALTY

*Clients tell us that EX Squared's adaptive & candid approach to software development is among our greatest strengths.*

*We appreciate when our clients are up-front about motivations and challenges... and our clients appreciate when we offer advice based on our real-world experiences.*

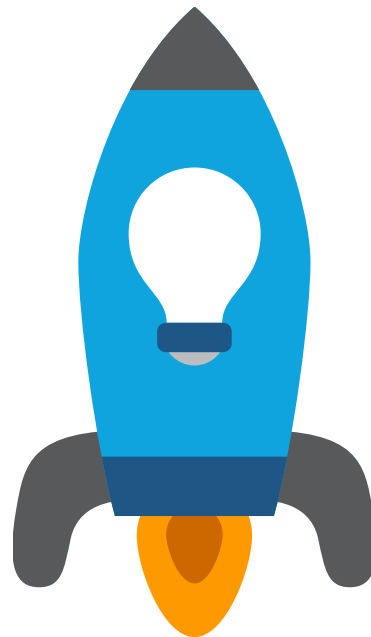


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## 4 WHO WE ARE

### *Sitecore Certified partner*

EX Squared Solutions is a leading implementer of the Sitecore Experience Platform. We are a team of highly skilled talent that focus on our clients' bottom line and leverage Sitecore's digital marketing suite to engage customers across every channel. We're a Microsoft Gold Certified Partner, with expert teams trained in Microsoft.NET, Apple, iOS (Objective-C), Android (Java), HTML5, and Microsoft Surface technologies. Our mission is to tackle business problems with creative, collaborative solutions that enhance and accelerate our clients' profitable growth.

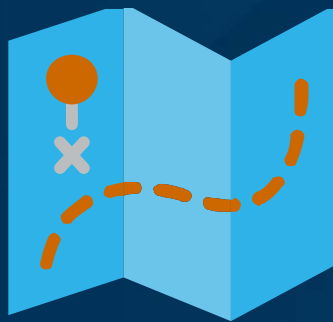






## Crafting Digital Journeys

Custom Software Development • Web, Mobile & Kiosk Apps  
Enterprise CMS, ERP & CRM integration • Internet of Things  
Microsoft Gold Certified Partner • MS Dynamics CRM Silver Partner  
Sitecore Certified Partner



personalized experience

service on demand

smarter analytics

any device, any time

top notch content

digital experience continuity

Contact us to discuss how EX² can transform your digital business.

[www.EXsquared.com](http://www.EXsquared.com)

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