Visitor Insights, Real-Time Capabilities

User Guide
2023

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Contents

Introduction

Overview of Visitor Insights, Real-Time Capabilities

Bombora Visitor Insights, Real-Time Capabilities provides the activity of website visitors in real-time, plus enriches the data with company, demographic, and firmographic information.

Benefits
- **Discover your audience** - gain deeper visibility into the company, demographic, and firmographic attributes of the visitors on your website, specifically how they're engaging and what content they're interacting with
- **Capture the full picture by combining 1st party data with 3rd party data** within Bombora's Audience Insights dashboards, available within the Planning & Measurement Suite, and leverage this data to power Bombora audiences
- **Gain an understanding of your visitors' interests** both on and offsite to drive marketing strategies and help convert visitors into sales pipeline

How does it work?

Visitor Insights, Real-Time Capabilities is a lightweight asynchronous JavaScript tag. Once placed on a page, it will return known segmentations about the visitor. There's a JavaScript API to retrieve the data points which can be customized depending on your intended use of the data.

Where can I access the data?

Visitor Insights, Real-Time Capabilities data can be accessed and utilized in many ways:
1. Use this data to build audiences in Bombora's Digital Audience Builder (available in the Bombora UI)
2. View and analyze the data in the Audience Insights dashboard within Bombora's Planning & Measurement Suite
3. Receive the data in real-time via a json response back to the page, which can be used for real-time controls or aggregation to the end platform of your choice
4. Receive the data in a csv file sent daily via SFTP for aggregation to the end platform of your choice

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Setting up the Bombora tags

Preparation

Here's a list of things you should've received from your Bombora contact:

1. **Standard Visitor Insights (VI) tag**
2. **Visitor Insights, Real-Time Capabilities (RTVI) tag**
3. **RTVI Tag User Guide**
4. **Bombora Segment Taxonomy RTVI excel file**

Tag Installation

1 Prefetch and preconnect Bombora's service (OPTIONAL)
This step is optional, but we highly recommend it. To ensure low latency response times, we can take advantage of browser hints with link preconnect and dns-prefetch. Please add these two lines into your head section:

<link rel="preconnect" href="https://vi.ml314.com">
<link rel="dns-prefetch" href="https://vi.ml314.com">

Reference:
https://developer.mozilla.org/en-US/docs/Web/Performance/dns-prefetch
https://developer.mozilla.org/en-US/docs/Web/HTML/Link_types/preconnect

2 Place the standard Visitor Insights tag
NOTE: If you already have a standard Bombora Visitor Insights tag placed, skip this step.

Deploy the Bombora standard VI JavaScript tag across all pages. The tag can be placed in either the header or footer.

3 Place the Visitor Insights, Real-Time Capabilities tag

The RTVI tag should be placed in the header or as high up on the page as possible. The sooner this tag executes, the faster data will become available.

4 Indicate which segments Bombora will deliver
The tag has two sections. The top part is static and should remain as is. The bottom part includes a callback which can be modified to include the segments your team will want Bombora to deliver to your destination platform. Segments can be found on pages 7 & 8 of this guide.

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Setting up the Bombora tags (cont.)

Visitor Insights, Real-Time Capabilities tag details (cont.)

Here's a sample call, showcasing segmentation modifications within Google Tag Manager for delivery into Google Analytics:

```
_bmb('vi', function(data){
  if (data) {
    window.dataLayer = window.dataLayer || [];
    window.dataLayer.push({
      'event' : 'Bombora_Informer',
      'Bombora_Topic': (data.topic && data.topic.length > 0) ? data.topic[0] : null,
      'Bombora_Industry': data.industry,
      'Bombora_Company_Revenue': data.revenue,
      'Bombora_Company_Size': data.size,
      'Bombora_Domain': data.domain,
      'Bombora_Seniority': data.seniority,
      'Bombora_Predictive_Category': (data.interest_group && data.interest_group.length > 0) ? data.interest_group[0] : null,
      'Bombora_Decision_Maker': data.decision_maker,
      'Bombora_Functional_Area': data.functional_area,
      'Bombora_Install_Data': (data.install_data && data.install_data.length > 0) ? data.install_data[0] : null,
      'Bombora_Segment' : (data.segment) ? data.segment.join(',') : null,
      'Bombora_Professional_Group': (data.professional_group && data.professional_group.length > 0) ? data.professional_group[0] : null
    });
  }
});
```

Sample Call showcasing modification when pushing data into Adobe Launch:

```
_bmb('vi', function(data){
  if (data != null) { //make sure there's data
    // Reference Adobe Launch Data Layer Manager Extension: https://techdocs.searchdiscovery.com/adobe-sol
    // Establish the data layer, naming it appEventData (One liner version)
    window.appEventData = window.appEventData || [];

    // Queue event push into Data Layer Manager and map the different values
    window.appEventData.push({
      "event": "Bombora Data",
      "bombora": {
        'domain': data.domain,
        'industry': data.industry,
        'revenue': data.revenue,
        'size': data.size,
        'installData': data.install_data,
        'jobFunction': data.functional_area,
        'professionalGroup': data.professional_group,
        'seniority': data.seniority,
        'decisionMaker': data.decision_maker,
        'b2bInterest': data.topic,
        'segment' : data.segment,
        'b2bInterestGroup': data.interest_group
      }
    });
  }
});
```

The callback function can be used as many times as is needed. Data is loaded once per impression, and each subsequent call will retrieve data from the cache.

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Segmentation data

Sample data object

Here's an example of the full response data object:

```
{
  "domain": "capitalone.com",
  "company_name":"capital one",
  "industry": "Finance",
  "industry_id": "ind_39",
  "revenue": "XXLarge ($1B+)",
  "revenue_id": "re_7",
  "size": "XXLarge (10,000+ Employees)",
  "size_id": "sz_8",
  "install_data": ["Enterprise Applications > Enterprise Business Solutions (EBS)"],
  "install_data_id": ["id_4"],
  "functional_area": "Information Technology > Software",
  "functional_area_id": "fa_31",
  "professional_group": ["Business Professional", "Fortune 500 Employee", "Finance
Professional"],
  "professional_group_id": ["pg_1", "pg_4", "pg_3"],
  "seniority": "Management",
  "seniority_id": "sn_3",
  "decision_maker": "Finance Decision Maker",
  "decision_maker_id": "dm_1",
  "topic": ["E*Trade (ETFC)"],
  "topic_id": ["1500923"],
  "interest_group": ["Trading & Investing"],
  "interest_group_id": ["pc_14"],
  "segment": ["bmbsurg","bmbintent"],
  "visitor_country": ["United States","Canada"],
  "b2b_interest_cluster": ["BMB Cluster X","BMB Cluster Y"],
  "b2b_interest_cluster_id": ["c8d491496c7...","c8d491496c7e493..."]
}
```

We only return segment values when we have information about that visitor.
Here is an example of a profile with only two available segments:

```
{
  "domain": "somesite.com",
  "industry": "Finance"
}
```

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Segmentation data details

Refer to the Bombora Segment Taxonomy RTVI excel file for all segmentation values and mappings.

Segment Name	Segment Key	Value Type	Description
Company Domain	domain	string	The visitor's company or email domain.
Company Name	company_name	string	The company name of the visitor
Company Industry	industry	string	The industry of the visitor's company.
Company Industry ID	industry_id	string	A shortened ID to represent the industry value.
Company Revenue	revenue	string	The revenue range of the visitor's company.
Company Revenue ID	revenue_id	string	A shortened ID to represent the revenue value.
Company Size	size	string	The employee size of the visitor's company.
Company Size ID	size_id	string	A shortened ID to represent the size value.
Install Data	install_data	array	Products or Technologies the visitor's company are using.
Install Data ID	install_data_id	array	A shortened ID to represent the install data value.
Custom ABM Segment	segment	array	The ABM segment ID based on the visitor's company domain. Refer to page 9 for additional details about Custom ABM Segments.
NEW! Company Country	hq_country	string	The company's headquarter country.
NEW! Company Country Code	hq_country_code	string	A shortened code to represent the company's headquarter country. Found in the "Segment ID" column of the segment taxonomy.
NEW! Company State	hq_state	string	The company's headquarter state.
NEW! Company State Code	hq_state_code	string	A shortened code to represent the company's headquarter state. Found in the "Segment ID" column of the segment taxonomy.

More segmentation values on page 8.

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Segmentation data details (cont.)

Refer to the Bombora Segment Taxonomy RTVI excel file for all segmentation values and mappings.

Segment Name	Segment Key	Value Type	Description
Job Function	functional_area	string	The job function of the visitor.
Job Function ID	functional_area_id	string	A shortened ID to represent the job function value.
Professional Group	professional_group	array	The professional group of the visitor.
Professional Group ID	professional_group_id	array	A shortened ID to represent the professional group value.
Seniority	seniority	string	The visitor's seniority.
Seniority ID	seniority_id	string	A shortened ID to represent the seniority value.
Decision Maker	decision_maker	string	The decision maker value of the visitor.
Decision Maker ID	decision_maker_id	string	A shortened ID to represent the decision maker value.
B2B Interest	topic	array	The topics the visitor is interested in based on their content consumption across Bombora's co-op. Top 3 are included. Full taxonomy here: https://sentry.bombora.com/v2/surge/downloadtopics?type=b2b
B2B Interest ID	topic_id	array	A shortened ID to represent the B2B interest value. Full taxonomy here: https://sentry.bombora.com/v2/surge/downloadtopics?type=b2b
B2B Interest Group	interest_group	array	The B2B Interest Group of the visitor based on their topics of interest.
B2B Interest Group ID	interest_group_id	array	A shortened ID to represent the B2B interest group.
Custom B2B Interest Cluster	b2b_Interest_cluster	array	The list of defined clusters which map to the visitor's B2B Interest. Refer to page 12 for details.
Custom B2B Interest Cluster ID	b2b_Interest_cluster_id	array	A shortened ID to represent the Custom B2B interest cluster.
NEW! Visitor Country	visitor_country	string	The visitor's Country.
NEW! Visitor Country Code	visitor_country_code	string	A shortened code to represent the visitor's country. Found in the "Segment ID" column of the segment taxonomy.
NEW! Visitor State	visitor_state	string	The visitor's State
NEW! Visitor State Code	visitor_state_code	string	A shortened code to represent the visitor's state. Found in the "Segment ID" column of the segment taxonomy.
NEW! Visitor Metro Area	visitor_metro_area	string	The visitor's Metro Area (does not include metro codes or Segment IDs)

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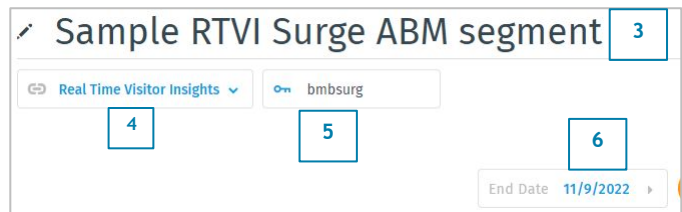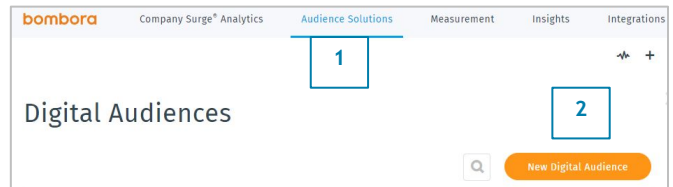# Custom ABM Segments

What are Custom ABM Segments?

Custom ABM segments are an optional feature which allow you to define account lists that can be leveraged in the tag callback. When a site visitor is identified as matching a domain in any of your ABM segments, we'll return the associated Custom ABM Segment ID.

Custom ABM Segments can be defined in the Digital Audience Builder section of the UI using any of these three options:
A.   Upload a list of accounts
B.   Select from Bombora's firmographic attributes like industry, size and revenue
C.   Connect to a Company Surge® report

How to create Custom ABM Segments?

1   In the Bombora UI, click on "Digital Audiences" under the Audience Solutions top navigation

2   Select "New Digital Audience"

3   Enter an "Audience Name", an internal name for your reference

4   Select "Real-Time Visitor Insights" in the drop down menu. Contact your Bombora representative if this option is not available for you.

5   Enter a unique "External ID", which will be returned return when we identify visitors in this segment. Avoid using special characters like spaces and single or double quotes.

6   Select an "End Date"

Custom ABM Segments

How to create Custom ABM Segments? (cont.)

7   Select a method for defining your Custom ABM Segment:

       A.   Upload Domains
       B.   Connect to Company Surge®
       C.   Use Bombora Firmographics

7A   In "Account-Based Marketing", under the "Upload Domains" tab, you can upload a csv file of domains or enter a list of domains in the box.

7B   In "Account-Based Marketing", under the "Connect to Company Surge®" tab, select the existing report you wish to connect.

     The weekly domains from the selected report will be used in this segment.

     Visit page 4 of the UI user guide to learn more about creating a report.

7C   In "Firmographics", you can select the appropriate attributes across Industry, Company Revenue, and Company Size.

8   Once your account list preferences are configured, select the "Generate Segment" button.

     Bombora will start processing the data and begin delivering the segment IDs the **next day**.
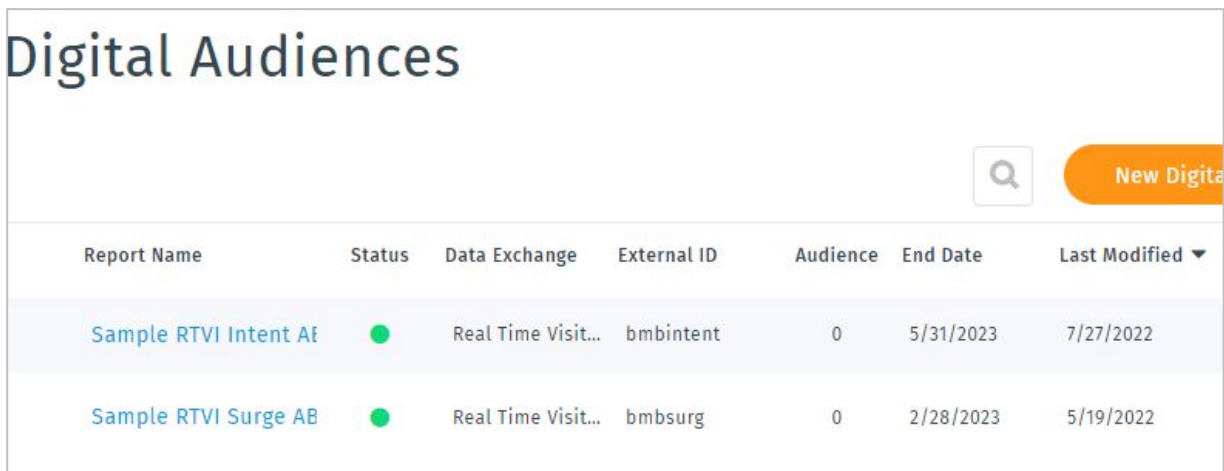
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Custom ABM Segments

How are Custom ABM Segments delivered?

Once Bombora processes the data, we'll start matching your visitor's company domain to the defined segments.

The segment IDs will be included in the JavaScript response object. Refer to page 7 and 8 of this guide for more details.

Here's an example of two segments created in Bombora's Digital Audience Builder (DAB):

Digital Audiences

Report Name	Status	Data Exchange	External ID	Audience	End Date	Last Modified ▼
Sample RTVI Intent AE	●	Real Time Visit...	bmbintent	0	5/31/2023	7/27/2022
Sample RTVI Surge AB	●	Real Time Visit...	bmbsurg	0	2/28/2023	5/19/2022

Here's an example response of a visitor that qualifies for both segments:

```
{
  "domain": "capitalone.com",
  "industry": "Finance",
  "industry_id": "ind_39",
  "revenue": "XXLarge ($1B+)",
  "revenue_id": "re_7",
  "size": "XXLarge (10,000+ Employees)",
  "size_id": "sz_8",
  "install_data": ["Enterprise Applications > Enterprise Business Solutions (EBS)"],
  "install_data_id": ["id_4"],
  "functional_area": "Information Technology > Software",
  "functional_area_id": "fa_31",
  "professional_group": ["Business Professional", "Fortune 500 Employee", "Finance Professional"],
  "professional_group_id": ["pg_1", "pg_4", "pg_3"],
  "seniority": "Management",
  "seniority_id": "sn_3",
  "decision_maker": "Finance Decision Maker",
  "decision_maker_id": "dm_1",
  "topic": ["E*Trade (ETFC)"],
  "topic_id": ["1500923"],
  "interest_group": ["Trading & Investing"],
  "interest_group_id": ["pc_14"],
  "segment": ["bmbsurg","bmbintent"]
}
```

<blockquote>
</blockquote>

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Custom B2B Interest Cluster
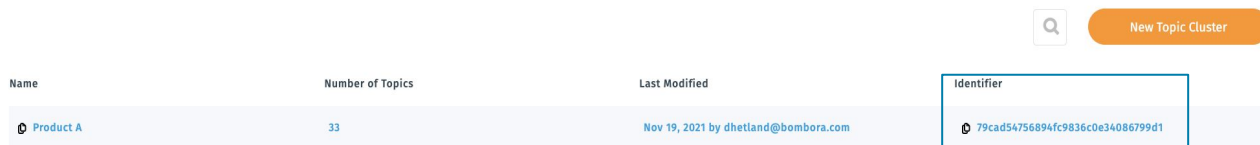
What is a Custom B2B Interest Cluster?

Custom B2B Interest Clusters allow you to group related topics into a defined cluster. Custom clusters enable Bombora to map the visitor's B2B Interest to the defined clusters. When a site visitor is identified and has researched a topic in any of your custom clusters, the associated custom cluster IDs will be returned in the JavaScript response object.

Custom Clusters can be defined in the Bombora UI under the "Manage Topic Clusters" section. For more information about Topic Clusters and how to create them, visit the links here:

1. User Guide: Please see the "Topic Cluster" section on page 10 found here.

2. Please view the "Using the Topic Cluster Manager Tool" video found here.

Custom Cluster IDs are listed in the "Identifier" column in the "Topic Cluster Manager" section of the UI.

Topic Cluster Manager

Name	Number of Topics	Last Modified	Identifier
Product A	33	Nov 19, 2021 by dhetland@bombora.com	79cad54756894fc9836c0e34086799d1

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Frequently asked questions

Do I need to place both the Standard Visitor Insights and Visitor Insights (VI), Real-Time Capabilities (RTVI) tags?

Yes, Real-Time Capabilities are a complementary tag to our Standard VI tag. Their utilization is different but with supporting features across the two tags.

Can I use the data for multiple purposes on the page?

Yes, you can achieve that through a single callback or invoke another callback to suit your needs.

You do not need to load the full RTVI tag again. For example:

```
_bmb('vi', function(data){
  if (data) {
   //perform action 1
  }
);

_bmb('vi', function(data){
  if (data) {
    //perform action 2
  }
);
```

Is B2B Interest the same data as Company Surge®?

Not exactly. B2B Interest refers to content consumption at the device level. Bombora is providing insights about content that was consumed by this device across Bombora's B2B data Co-Op. B2B Interests at the device level are core ingredients to Company Surge®, which aggregates those interests up to the company level.

Is there a way to create topic clusters to organize B2B Interest?

Will you have data for net new users on their 1st page view?

Identity resolution rates will vary across different user compositions. Bombora strives to provide you with data to make that first impression count. If we have any data about that user/device, then we'll do our best to deliver it promptly.

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Surf's up.
Let's take off.

For additional help, please contact your account representative or email us at support@bombora.com.

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