

Adobe Experience Platform Hands on Lab

Greencross Pet Wellness Company

"puppy playing with ball in park red colours"

22 August 2024



Curriculum

(5 hours)

*Focus: Marketing
Operations –
Audiences, Activation
and Journey Building*



Topic	Description	Time	Experience & Content
Introductions & User Access	Team & customer intros + ensure all users have access to AEP sandbox	15 mins	
Real-Time Customer Profile	AEP Overview and the Real-time Customer Profile	30 mins	Hands-on exercise • Profile Lookup • Identity Stitching (web and mobile)
Audiences & Segmentation	Generate audiences from Real Time Customer Profile	45 mins	Hands-on exercise • Create a basic audience • Create a complex audience • Audience Composition
Activation	Active data and audiences to marketing and advertising destinations	15 mins	Demo • Destinations Catalog • Activation to Social (Tiktok)
Lunch Break		45 mins	
Content and Campaigns	Let's get started with Journey Optimizer content and campaigns	45 mins	Hands-on exercise • Asset Essentials, Content Templates and Fragments • Campaign Creation
Real-time Journeys	Building a basic journey	45 mins	Hands-on exercise • Create a real-time Journey • Test your journey • Journey Reporting
Offer Management	Overview of Offer Management	15 mins	Demo • Omni-channel offers
Customer Journey Analytics	Omni-channel reporting	30 mins	Demo and optional hands-on exercise • ROBIS Use Case
Q&A + Wrap-up		15 mins	

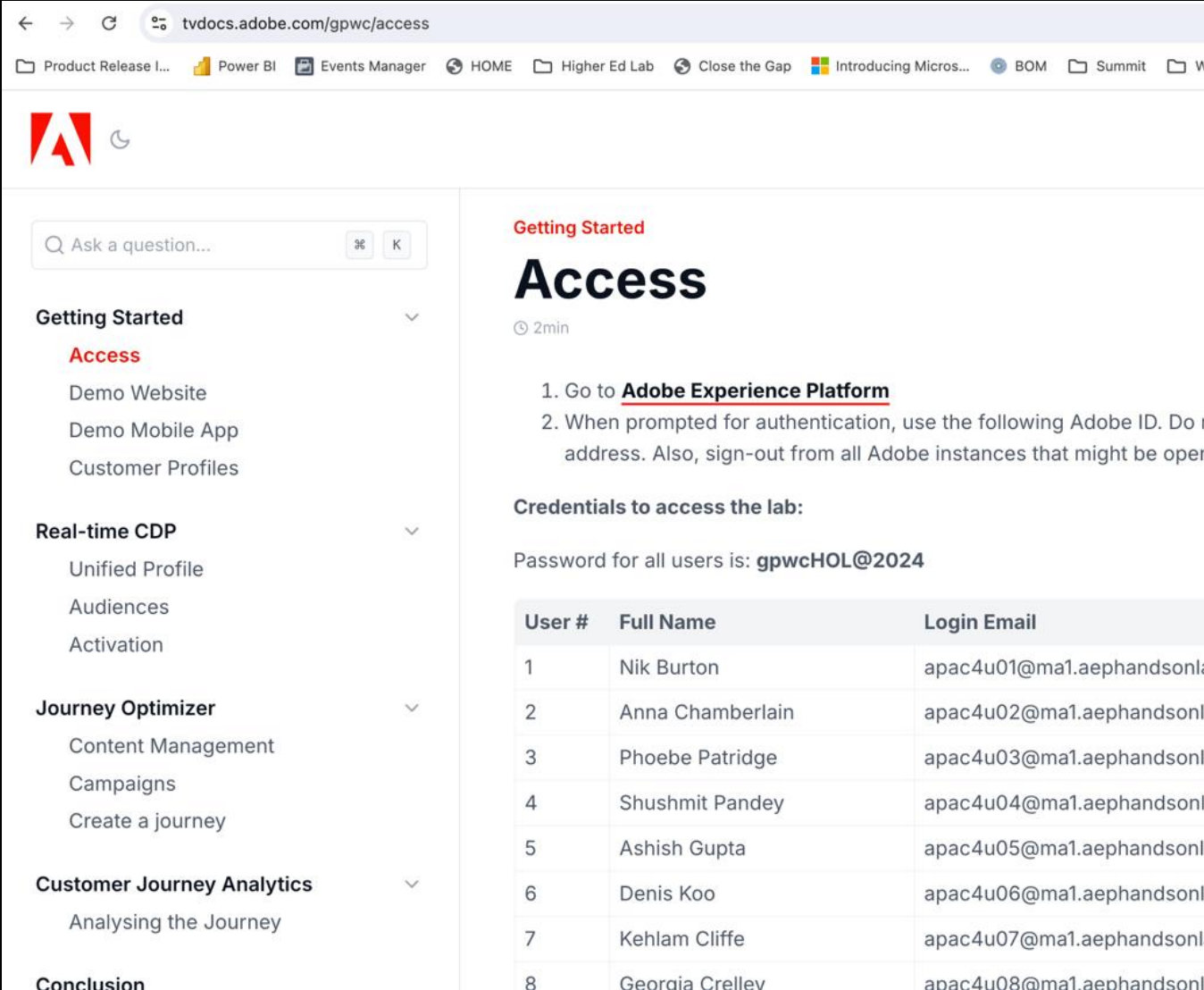
Reminders as we get started

- This lab is geared around you learning about the features of the product.
- This lab is conducted in a demo environment and does not reflect performance of the application in production.
 - Instance will not contain data representative of a full-scale production system.

Getting Started

- Logout of any Adobe instance you are currently logged into!
- Login information for this hands-on lab and step by step instructions :

<https://tvdocs.adobe.com/gpwc>



The screenshot shows a web browser window with the URL `tvdocs.adobe.com/gpwc/access`. The page features a sidebar on the left with a search bar and a navigation menu. The main content area on the right is titled 'Getting Started Access' and includes a 2-minute estimated reading time. It contains two numbered steps for accessing the Adobe Experience Platform, followed by a section for credentials and a table of user accounts.

Getting Started
Access
⌚ 2min

1. Go to **Adobe Experience Platform**
2. When prompted for authentication, use the following Adobe ID. Do not use the same address. Also, sign-out from all Adobe instances that might be open.

Credentials to access the lab:

Password for all users is: **gpwcHOL@2024**

User #	Full Name	Login Email
1	Nik Burton	apac4u01@ma1.aephandsontl
2	Anna Chamberlain	apac4u02@ma1.aephandsontl
3	Phoebe Patridge	apac4u03@ma1.aephandsontl
4	Shushmit Pandey	apac4u04@ma1.aephandsontl
5	Ashish Gupta	apac4u05@ma1.aephandsontl
6	Denis Koo	apac4u06@ma1.aephandsontl
7	Kehlam Cliffe	apac4u07@ma1.aephandsontl
8	Georgia Crelley	apac4u08@ma1.aephandsontl

Lab Customer Profiles



Customer

For any customer facing interactions during the exercises, we have created separate fake customer profiles for you to use. Find these on the **Customer Profiles** page.

Getting Started

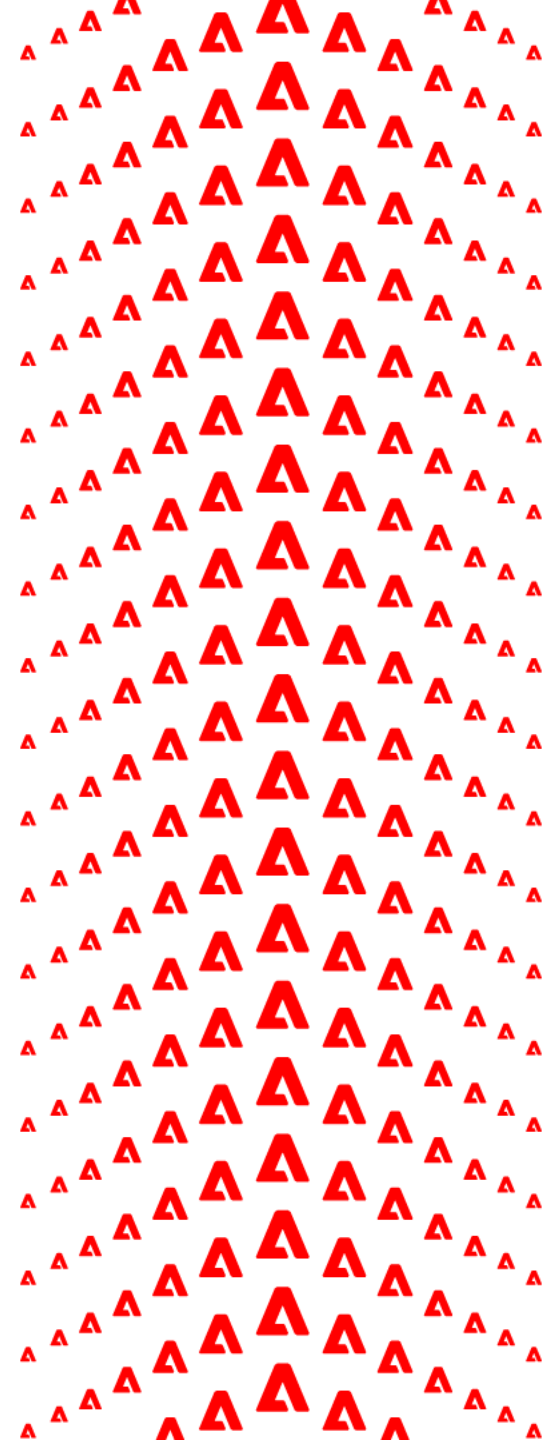
Customer Profiles

🕒 1min

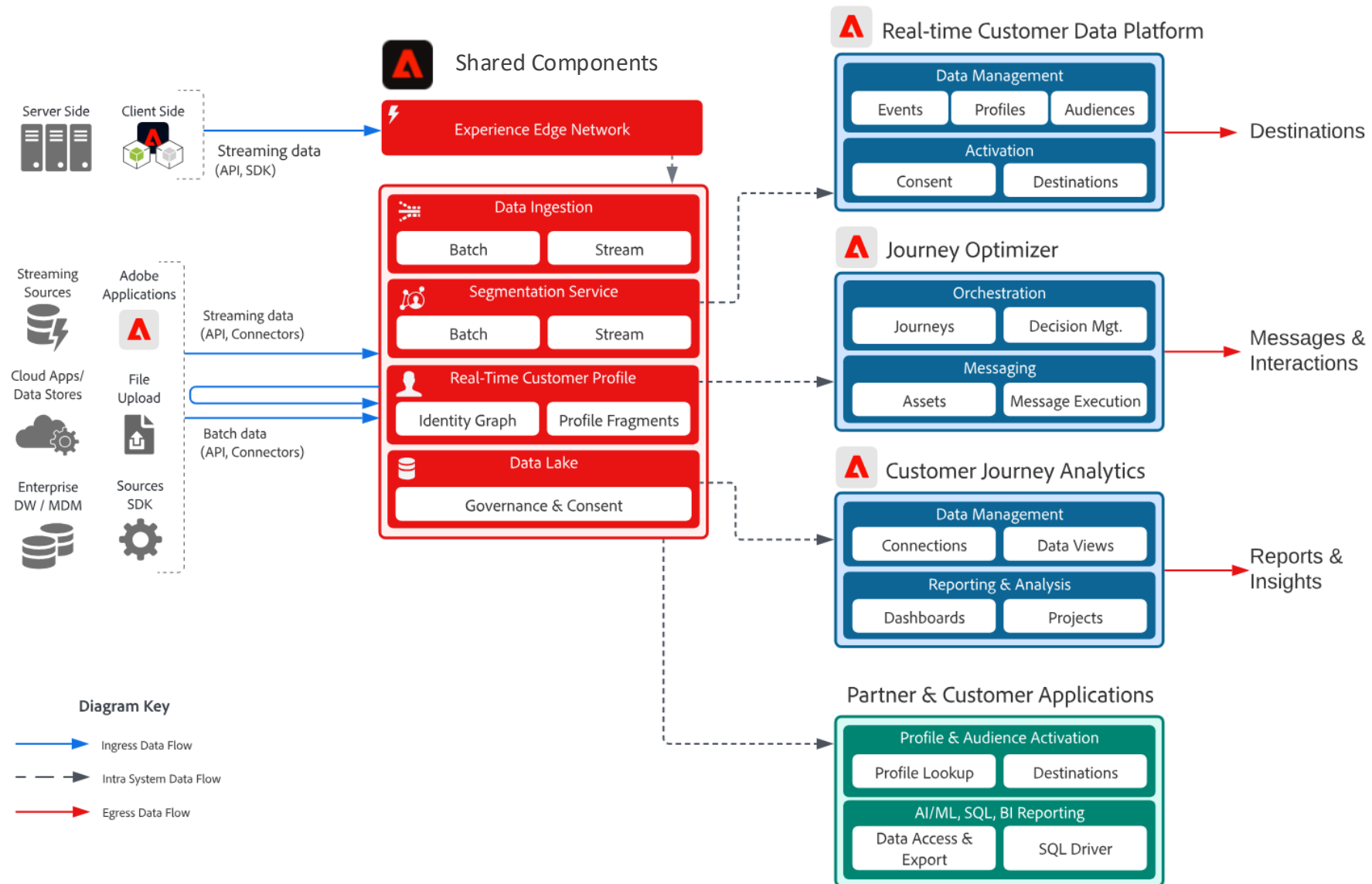
We've generated some fake customer profiles for us to use in the lab. Please note the attendee number next to your name on the **Access** page. Find the profile which matches that number in the following list of customer profiles, this will be your customer profile for the lab. We will reference this throughout the exercises.

Row Number	CRM ID	Email
1	9e955739-2a88-4678-a8b0-65e1e7520ef1	petbarn1@gmail.svpoc.io
2	3756162a-f72d-42ae-ab9d-a9316fe5afa8	petbarn2@gmail.svpoc.io
3	89a53c20-1b6f-42b1-84a9-a6ed0f50136c	petbarn3@gmail.svpoc.io
4	694b801b-7612-465e-88ae-2d3a627d1f17	petbarn4@gmail.svpoc.io
5	6f0108d3-f972-48f5-901b-e2ddb95d0dab	petbarn5@gmail.svpoc.io
6	39322eb6-ec07-4986-a214-a827cf683c98	petbarn6@gmail.svpoc.io
7	aa309fd6-0a18-473f-b6ca-69781052ba82	petbarn7@gmail.svpoc.io
8	eb00cb9a-ae5f-4eb5-a399-2f3732716864	petbarn8@gmail.svpoc.io
9	ac54194b-8284-4f40-ae5f-8700a8867275	petbarn9@gmail.svpoc.io
10	0a8c0ad6-18ef-434c-9cb8-a35ff54c2a56	petbarn10@gmail.svpoc.io
11	79450803-a0e8-4c85-a46f-181b6dd300a2	petbarn11@gmail.svpoc.io
12	a7196b54-2332-4c22-ba2f-43d7fef519a5	petbarn12@gmail.svpoc.io
13	38ab5581-9c59-4c98-9ada-43afe204688e	petbarn13@gmail.svpoc.io

AEP Overview



Adobe Experience Platform – Native Applications

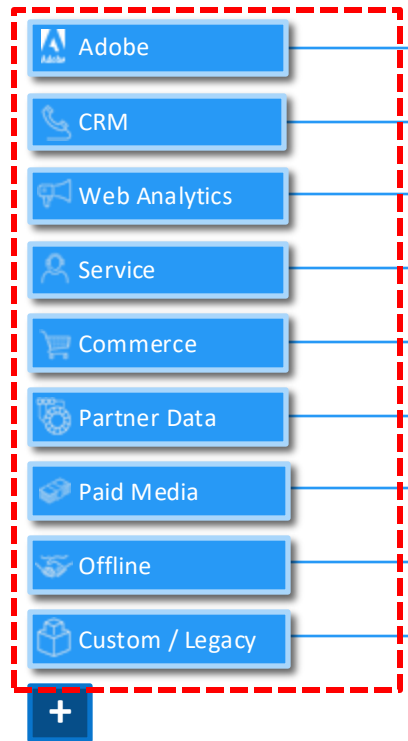


Complete Customer Data Management with Adobe Experience Platform

Sources

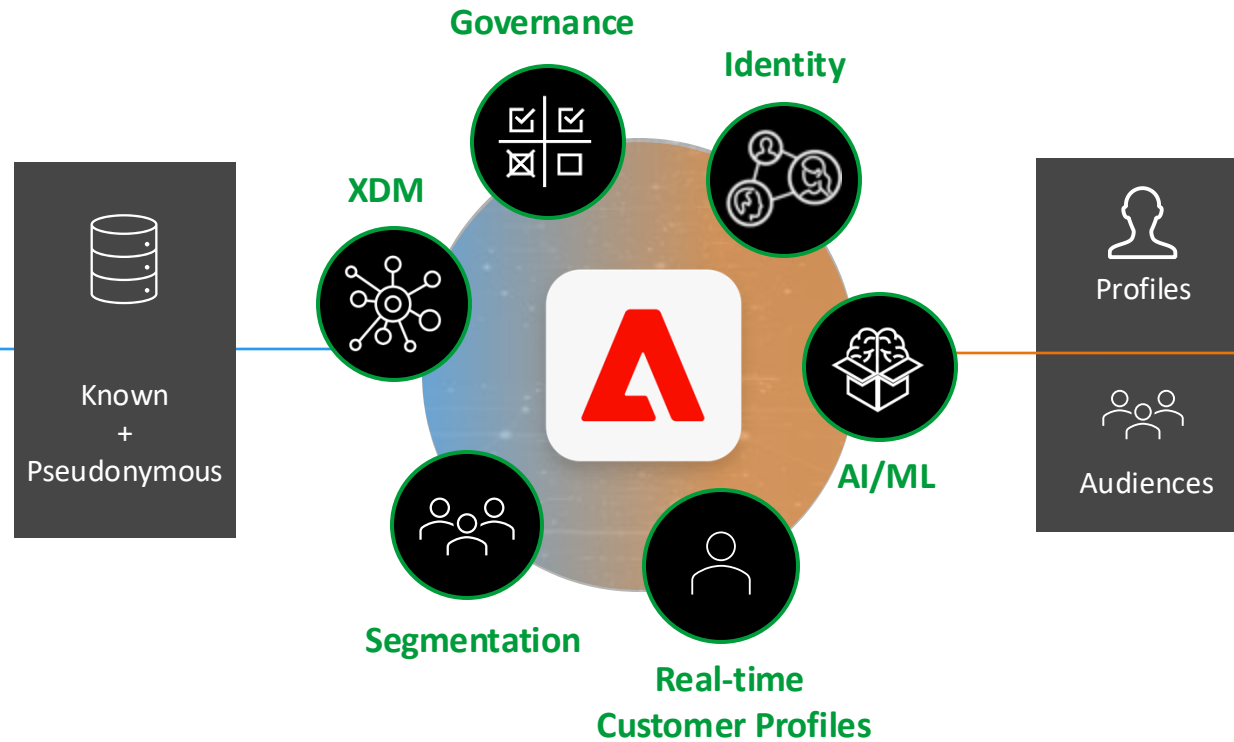
Flexible Data Ingestion

Adobe & Non-Adobe



Real-Time CDP

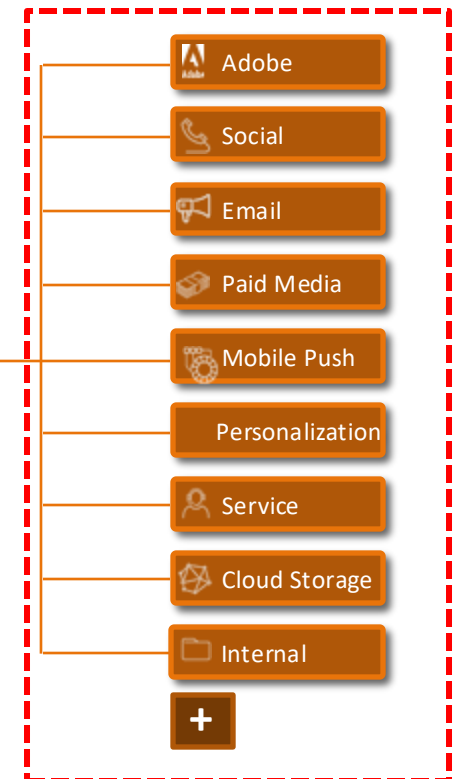
Unified Customer Profiles



Destinations

Activation Everywhere

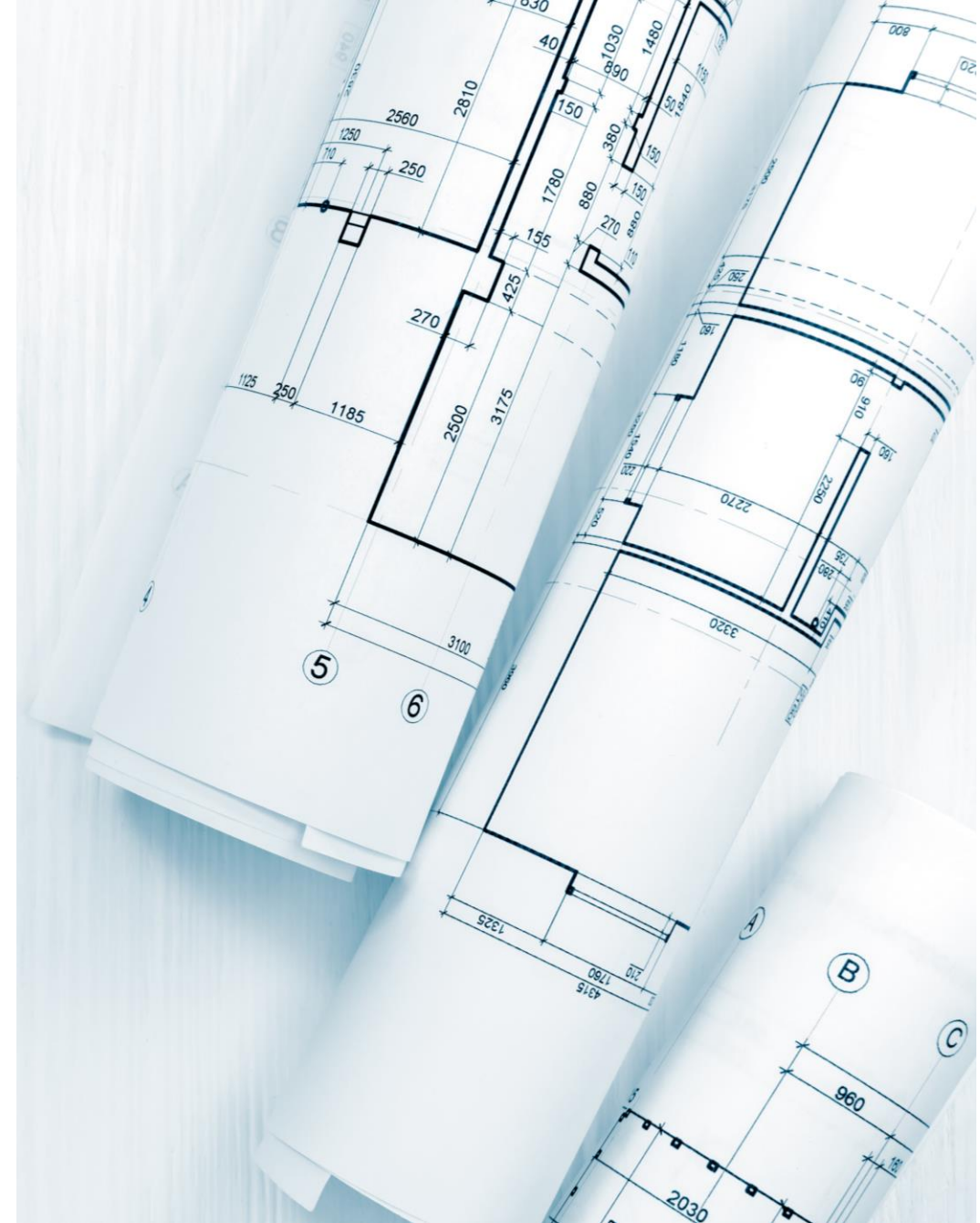
Adobe & Non-Adobe



The Real-Time Customer Profile

XDM | Experience Data Model

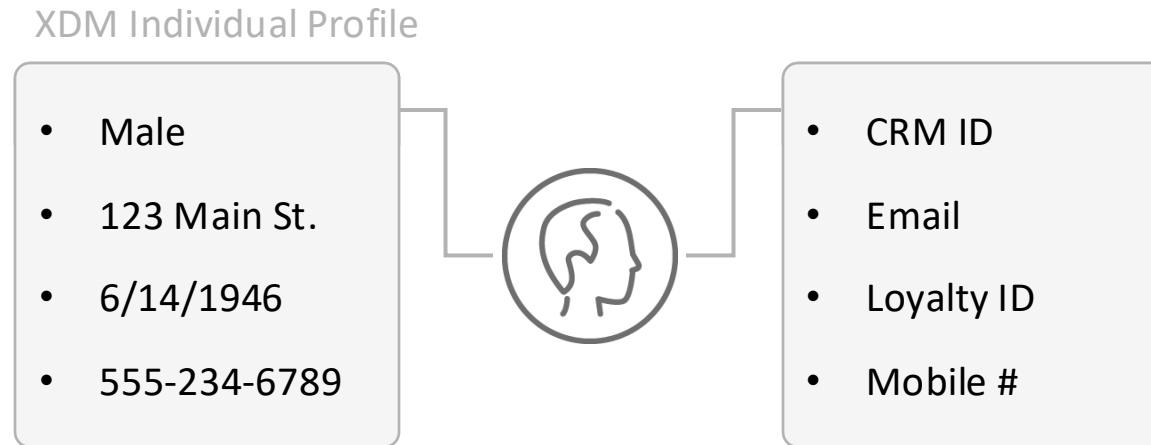
- XDM is the foundational JSON framework used to provide common structures and definitions to siloed data
 - Standardize the structure of data in a consistent and reusable way
 - Harmonize data across channels
 - Publicly documented specification in Adobe Experience League



Schemas | Class | XDM Individual Profile

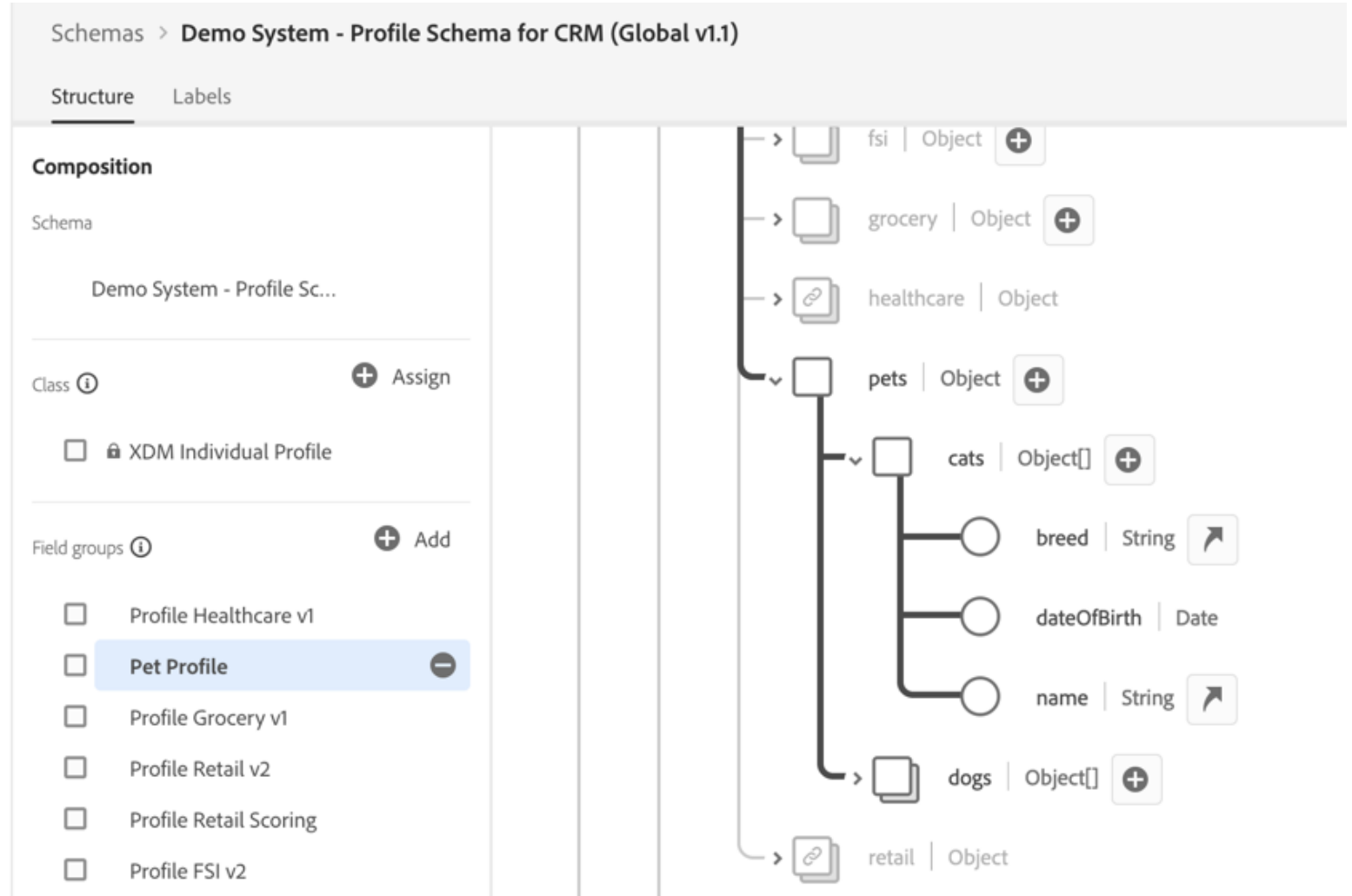


XDM Individual Profile class holds the attributes of a customer. These can be updated over time.



Example Profile Schema

- Pet details stored as list objects

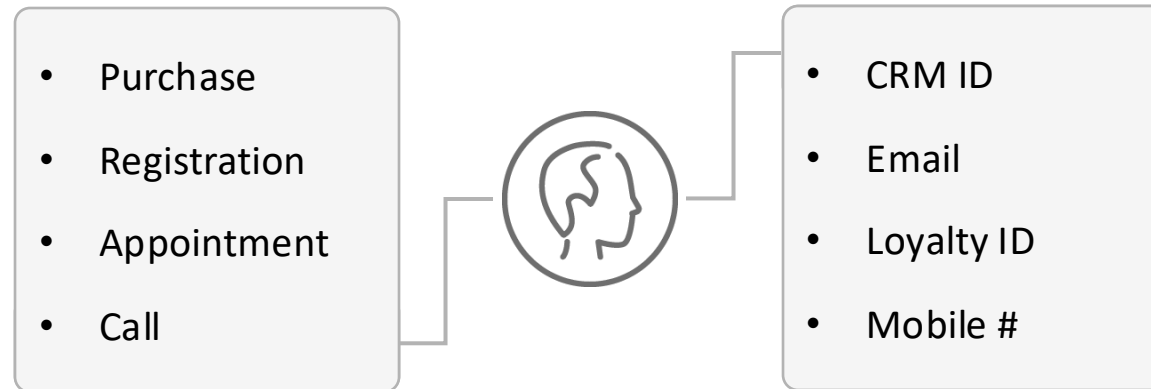


Schemas | Class | XDM ExperienceEvent



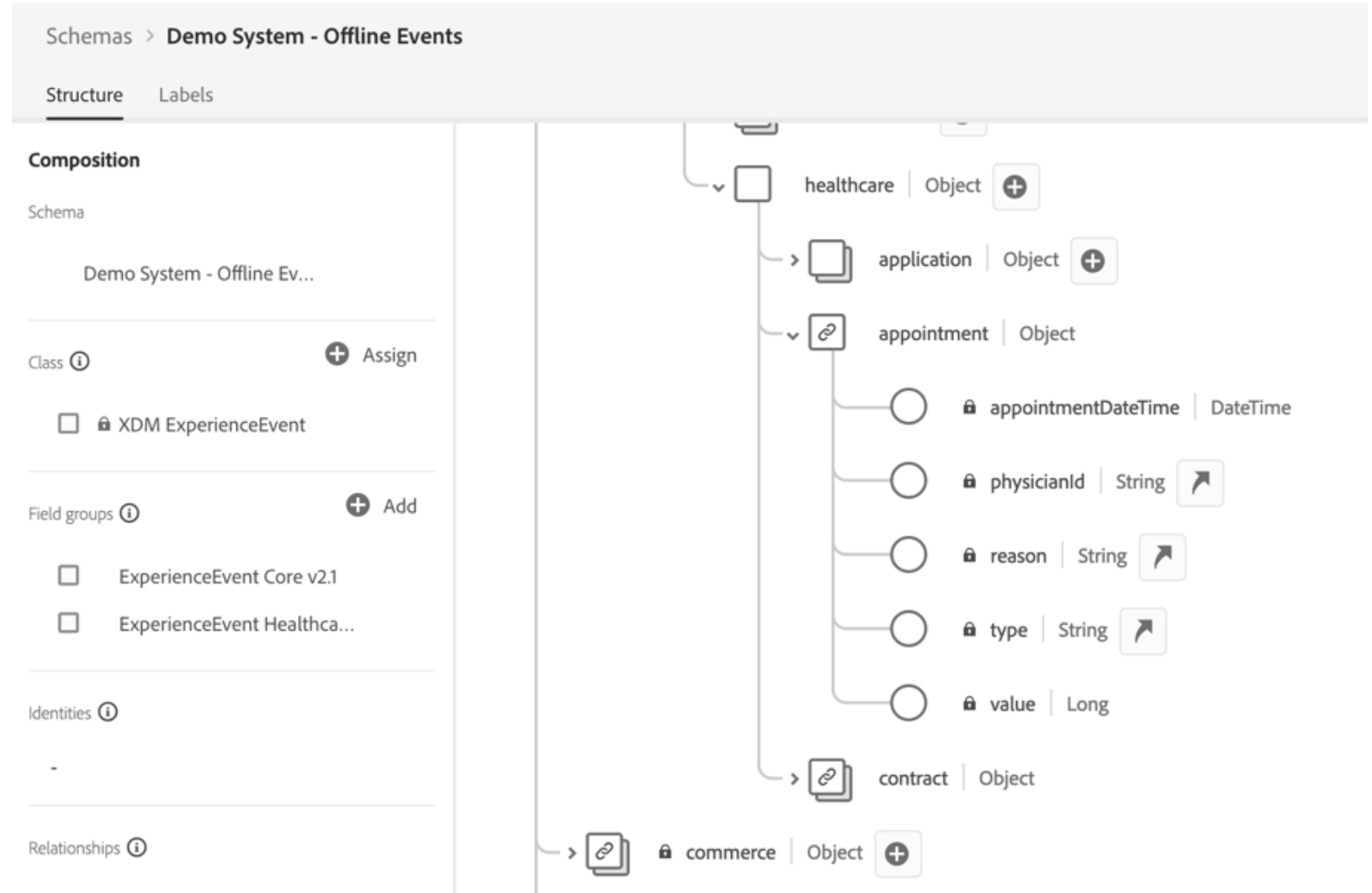
XDM ExperienceEvent class is used to capture behavioral data, including timestamp, event type and customer identity. These cannot be updated.

XDM ExperienceEvent



Example Experience Event Schema

- Offline events schema to record in person interactions with veterinary services



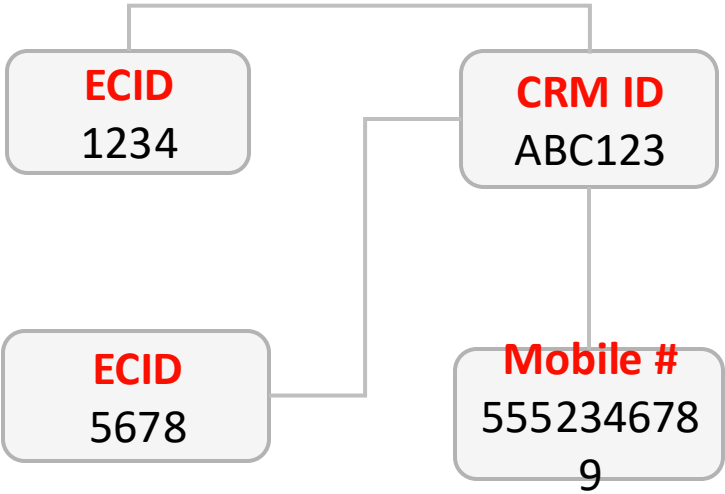
Identity Graphs

ExperienceEvents

Channel	Time	Event	ECID	CRM ID	Mobile #
Mobile	8:00 AM	pageview	1234		
Mobile	8:05 AM	log_in	1234	ABC123	
Desktop	10:00 AM	pageview	5678		
Desktop	10:05 AM	pageview	5678		
Desktop	10:10 AM	log_in	5678	ABC123	
Call Center	5:00 PM	call		ABC123	5552346789
Mobile	7:00 PM	pageview	1234		

Individual Profile

CRM ID	Mobile #	FName	LName	DOB	Gender
ABC123	5552346789	John	Doe	6/14/1986	Male



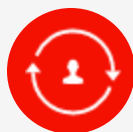
Data Representation



XDM Union: Individual Profile



CRMID	FirstName	Last Name
44	John	Doe
21	Jane	May



CRMID	date	Activity
44	1/1/2019 16:01	Add To Cart
21	4/5/2019 08:05	Call Ended



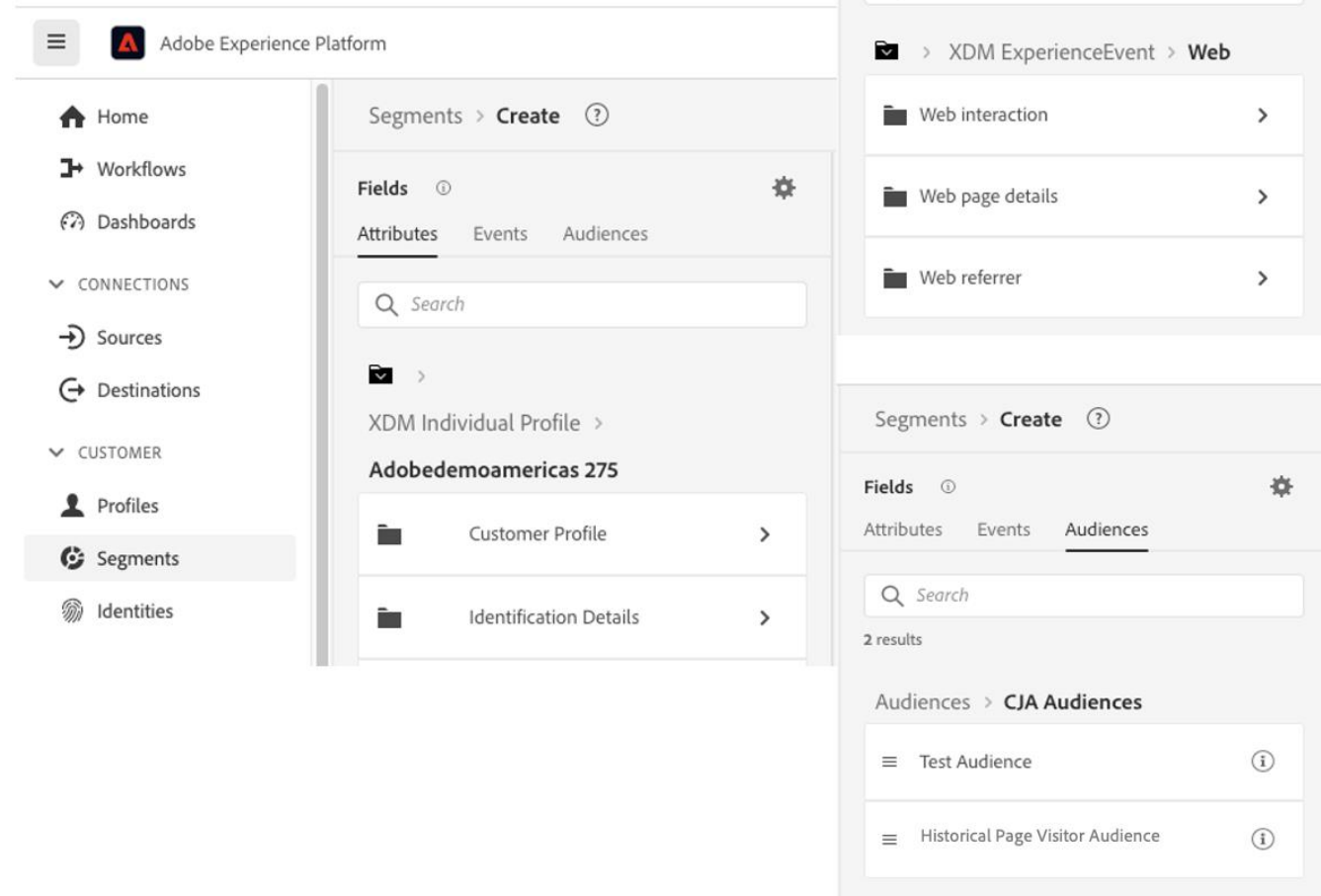
CRMID	Segment Id	Entered
44	abc-123-def	7/5/2019 11:01
21	abc-456-xyz	9/8/2019 04:01

Hands on Exercise

Audiences

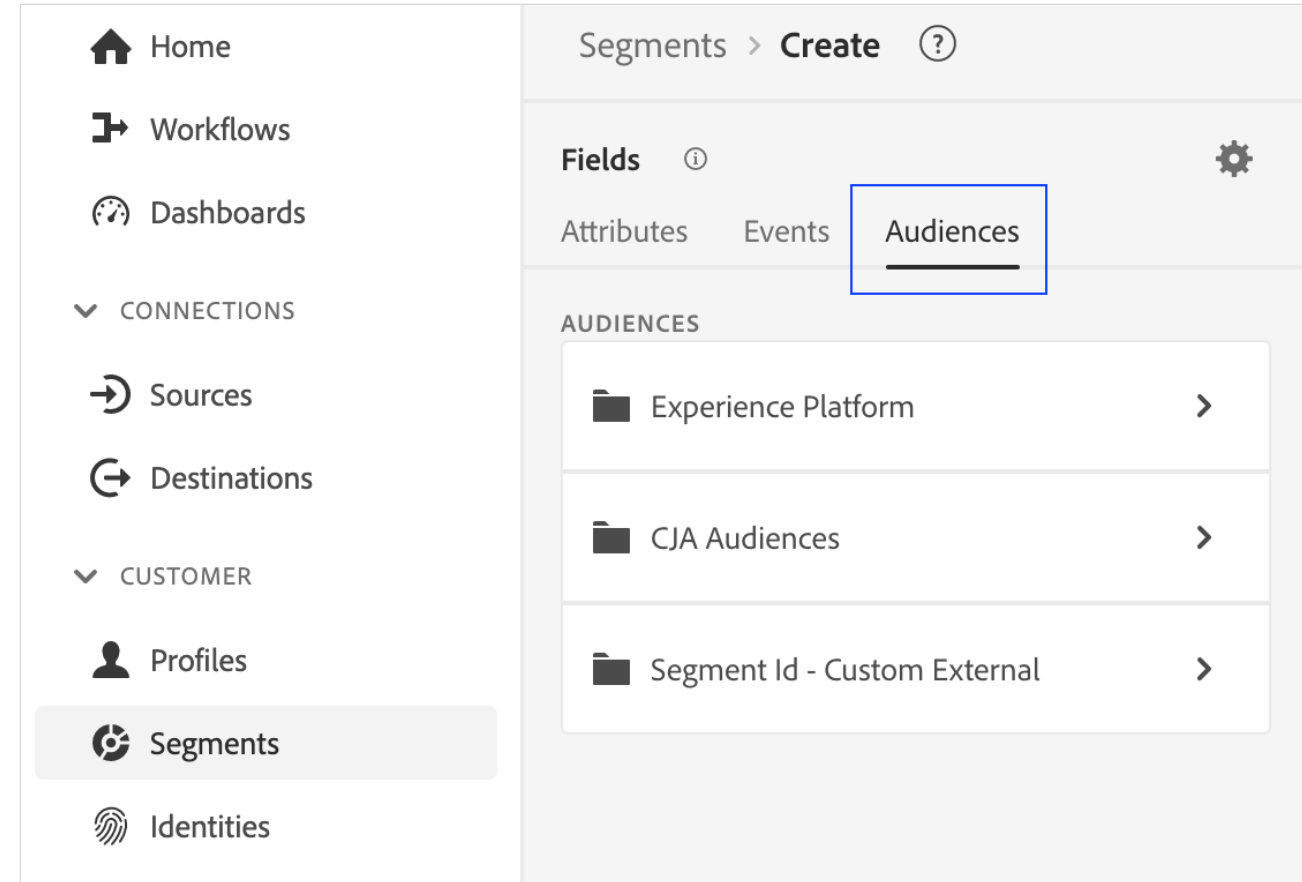
Rule-based Audiences

- Attributes: use one or more individual profile attributes
 - Pet details
 - Location details
 - Payment detail
- Events: use transactional / interaction / behavioral / engagement data
- Page views
- Vet or Store visits
- Purchases
- Call center interactions



Using Existing Audiences

- Importing audiences from external systems
 - Import an audience CSV file
 - Include additional attributes attached to the audience
- Reusing existing AEP audiences:
 - Re-use logic to avoid recreating
- Audience segments from CJA:
 - Publish audiences from CJA Reports
 - Use them to enhance CDP audiences



Audience Evaluation

Edge Evaluation

Evaluate segments instantaneously on the edge, enabling *same page and next page personalization* use cases.

- Requires Web SDK to send data via the Adobe Edge Network
- Segment logic meets edge segment query types

Streaming Evaluation

Evaluate segments as data lands into Platform. Near real-time data richness without scheduled jobs

- Requires data to be streamed into Platform
- Segment logic meets streaming segment query types

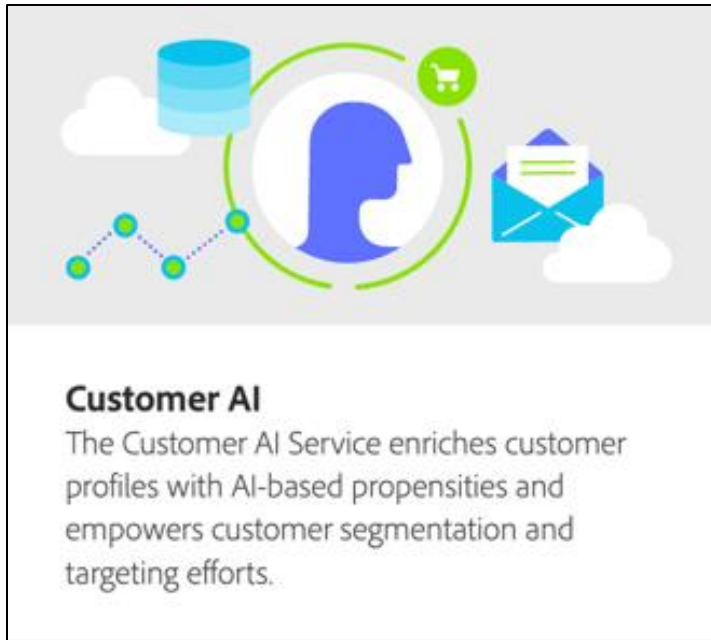
Batch Evaluation

Moves profile data at once through ALL Segment definitions to produce corresponding audiences

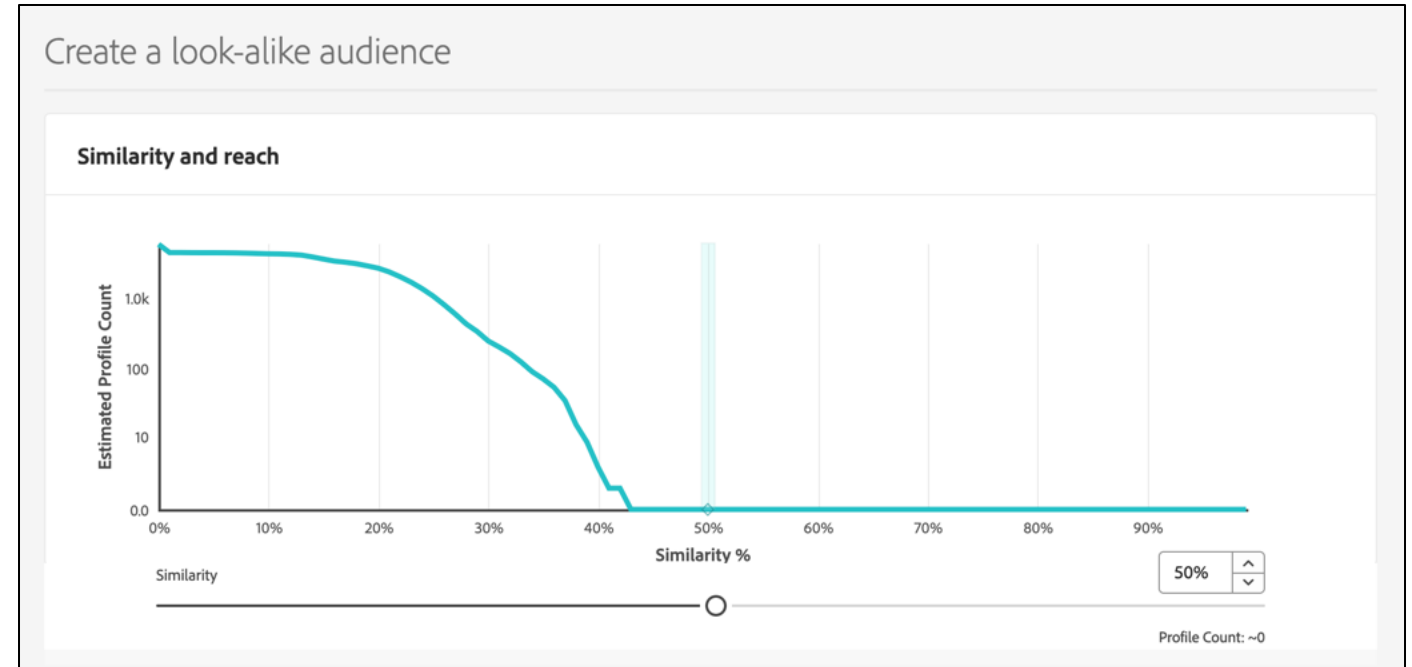
- Batch segments are evaluated on a daily schedule

Segments							
Overview Audiences Segments Compositions Feeds							
Search							
NAME ↓	BREAKDOWN	CHURN	PROFILE COUNT	EVALUATION METHOD	CREATED	LAST MODIFIED	
Test Profiles		0%	580	Streaming	12/02/2022, 12:53 PM	12/02/2022, 12:53 PM	
Male Customers		0%	313	Batch	12/08/2022, 8:09 AM	12/08/2022, 8:10 AM	
Loyalty Tier - Silver		0%	106	Batch	12/08/2022, 8:41 AM	12/08/2022, 8:41 AM	

Define audiences through the power of AI



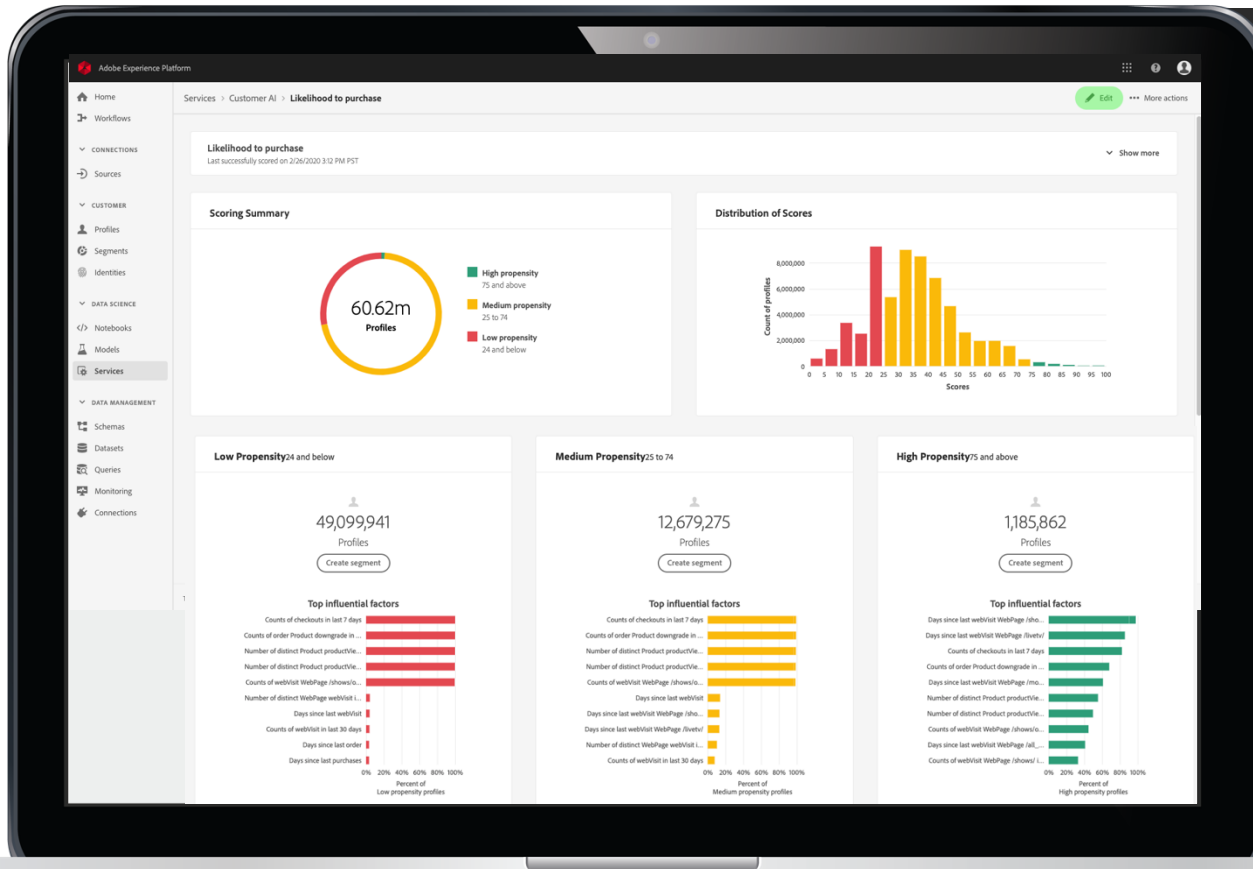
Propensity Modeling



Lookalike Audiences

Customer AI – Predict which of your profiles are likely to convert or churn

Predict the propensity of a student applying for or churning from a course and the key drivers behind their propensity to apply or churn in order to target them more effectively and increase marketing ROI



BENEFITS

- 1 Deliver **high accuracy** customer propensity models for stronger segmentation and targeting
- 2 Understand the **reasoning** or influential factors behind customer propensity behaviors
- 3 Easy to configure **self-service** interface designed for the marketer to reduce time-to-value
- 4 Seamlessly **activate** customer propensity scores across Adobe Experience Cloud and external apps

Lookalike Audiences - Finding more of your best prospects



Prospects who converted

Shared characteristics

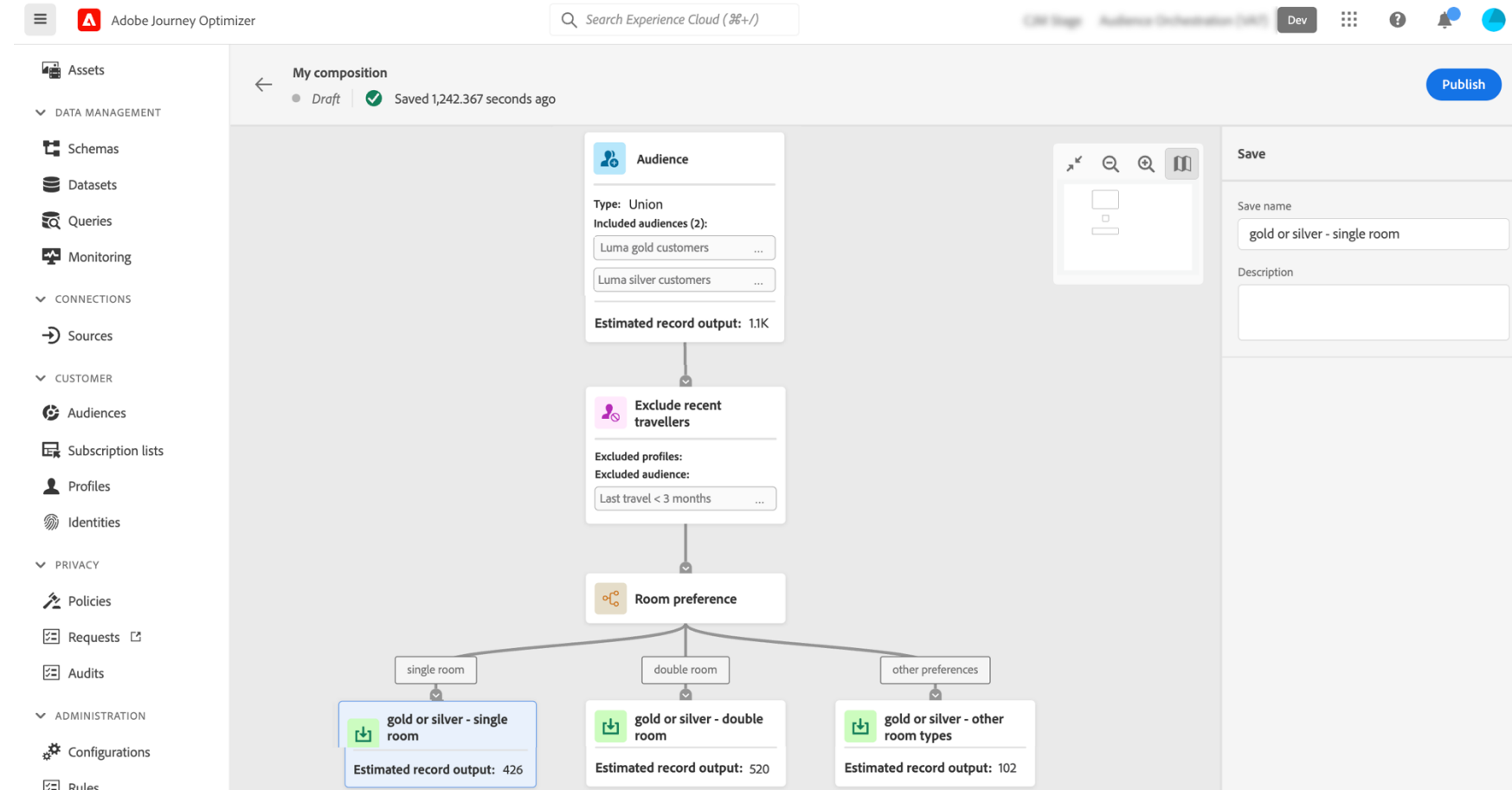
-  Attended puppy school
-  Are in the 25-34 age group
-  Downloaded the mobile app
-  Searched for breed info



Prospects who look like
those who converted

Audience Compositions

- Transform existing audiences in a visual canvas
- Join audiences – union or intersect
- Enrich audiences with personalization data
- Exclude audiences
- Rank audiences
- Split into multiple subsets
- Leverage resulting audiences within Journeys and Campaigns



Hands on Exercise

Audiences

Activation – RTCDP Destinations

Adobe Experience Platform

Search Experience Cloud (Ctrl+I)

DBS BANK LTD. poc (AUSS) Prod

Home

Workflows

Dashboards

CONNECTIONS

Sources

Destinations

CUSTOMER

Profiles

Segments

Identities

PRIVACY

Policies

Requests

Audits

DATA SCIENCE

Services

DATA MANAGEMENT

Schemas

Places

Datasets

Queries

Monitoring

ADMINISTRATION

Alerts

Sandboxes

License Usage

Destinations

OverviewCatalogBrowseAccountsSystem View

Activate your audiences using Adobe's Real-time Customer Data Platform

Introduction to destinations

All destinations

My destinations

TYPES

Connections

Extensions

CATEGORIES

Adobe applications

Advertising

Cloud storage

CRM

Email marketing

Mobile engagement

Personalization

Social

Streaming

Voice of the customer

Adobe applications

(V1) Marketo Engage

Connection

Set up

(V2) Marketo Engage

Connection

Set up

Advertising

Advertising Cloud DSP

Connection

Set up

Criteo

Connection (Beta)

Set up

Google Ad Manager

Connection

Set up

Google Ads

Connection

Set up

Google Customer Match

Connection

Set up

Google Display & Video 360

Connection

Set up

Microsoft Bing

Connection

Set up

Pinterest

Connection

Set up

Snap Inc

Connection

Set up

The Trade Desk

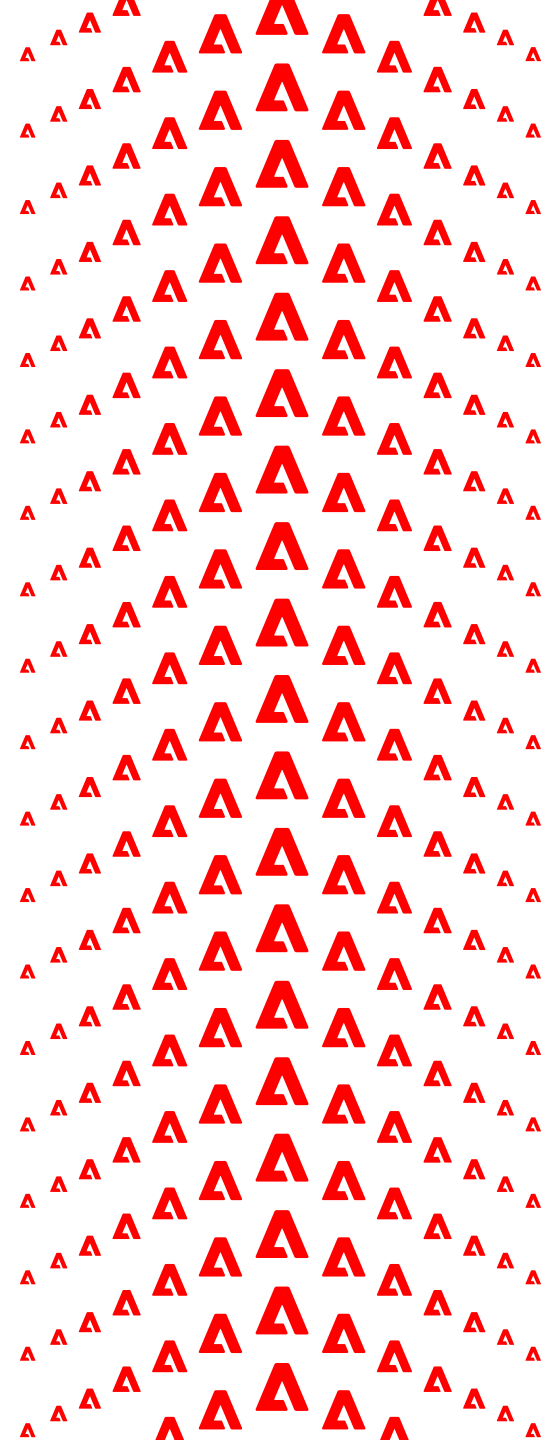
Connection

Set up

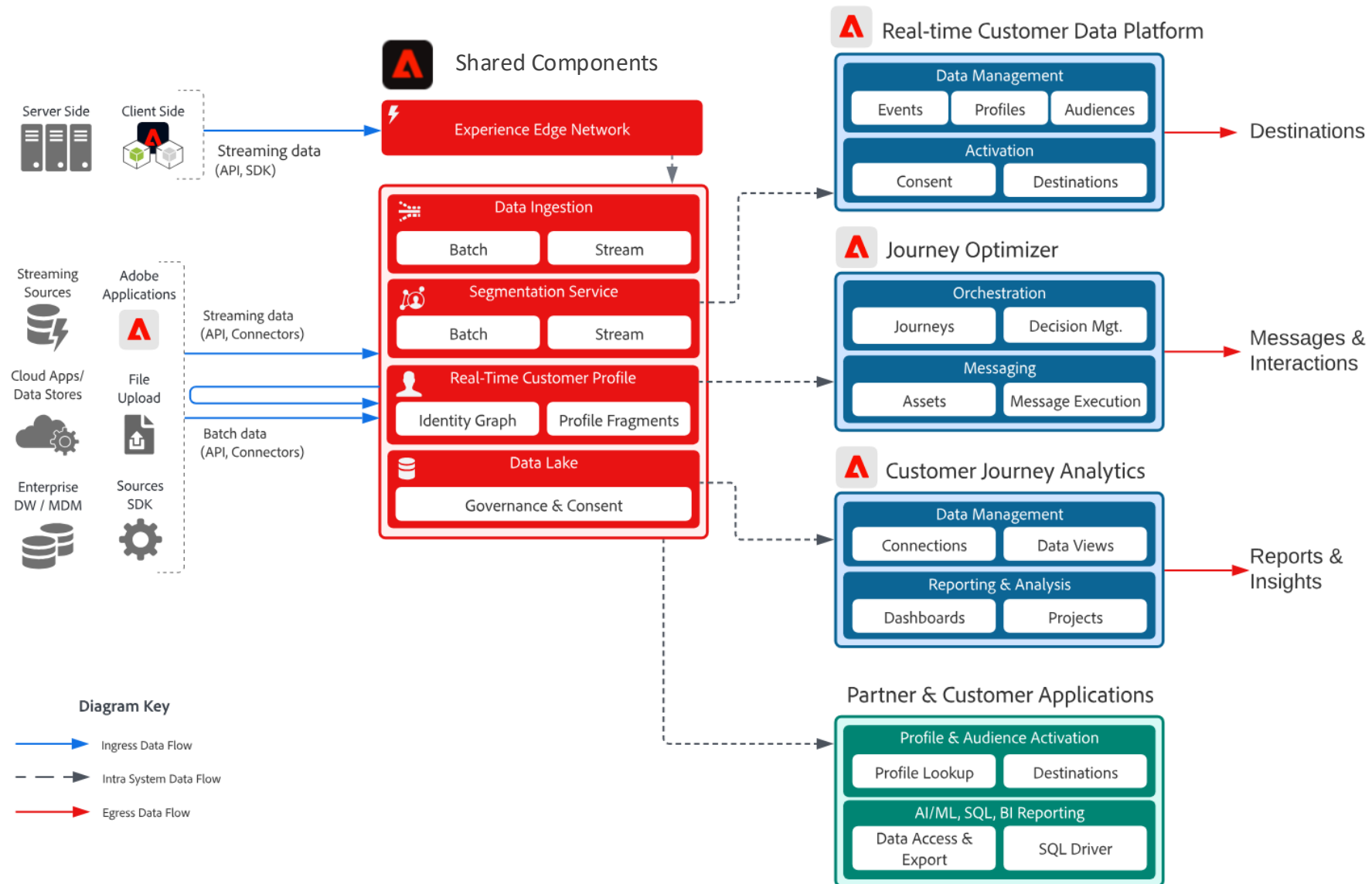
©2020 Adobe. All Rights Reserved. Adobe Confidential.

Demo

Break!



Adobe Experience Platform – Native Applications



Challenges of Creating Customer Journeys

Inability to engage an individuals' unique needs in the moment,
wherever their journey takes them.



Activating the relevant data
in real-time

Rationalizing and activating real-time customer profile, context, and business data to tailor an individual experience



Listening to individual needs
at scale

Listening to individual needs as they engage and progress through their non-linear journey delivering value in real-time



Driving customer-led
engagement

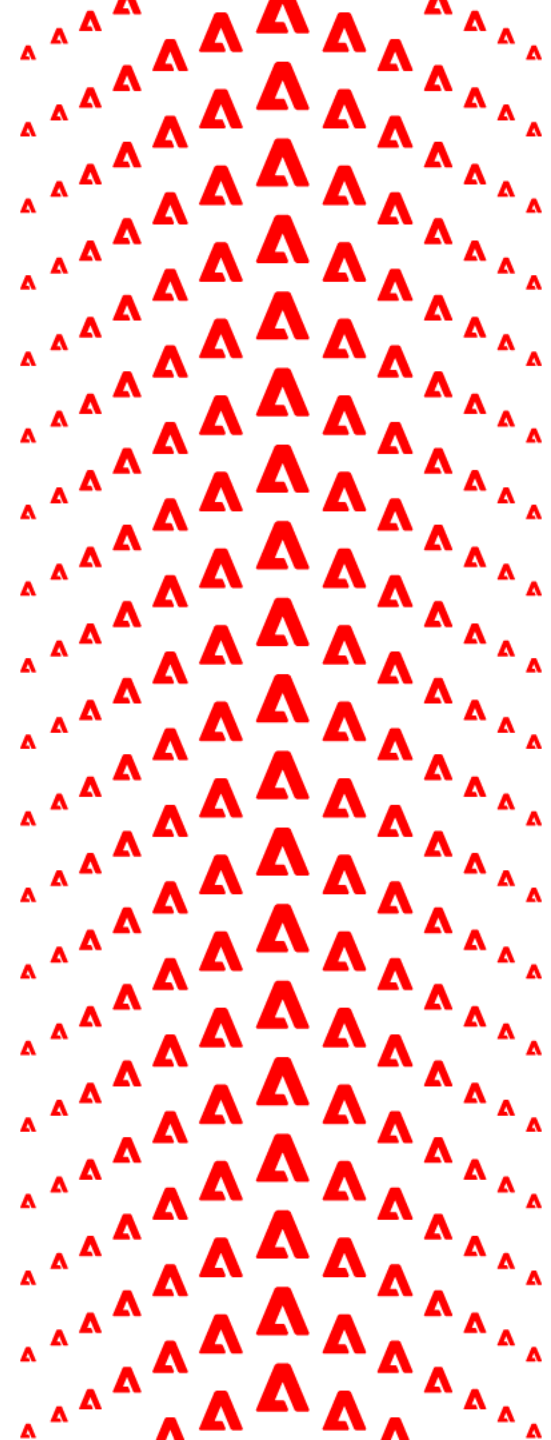
Moving away from segment-based engagement and reliably driving customer-led journeys at scale for every individual



Breaking down
experience silos

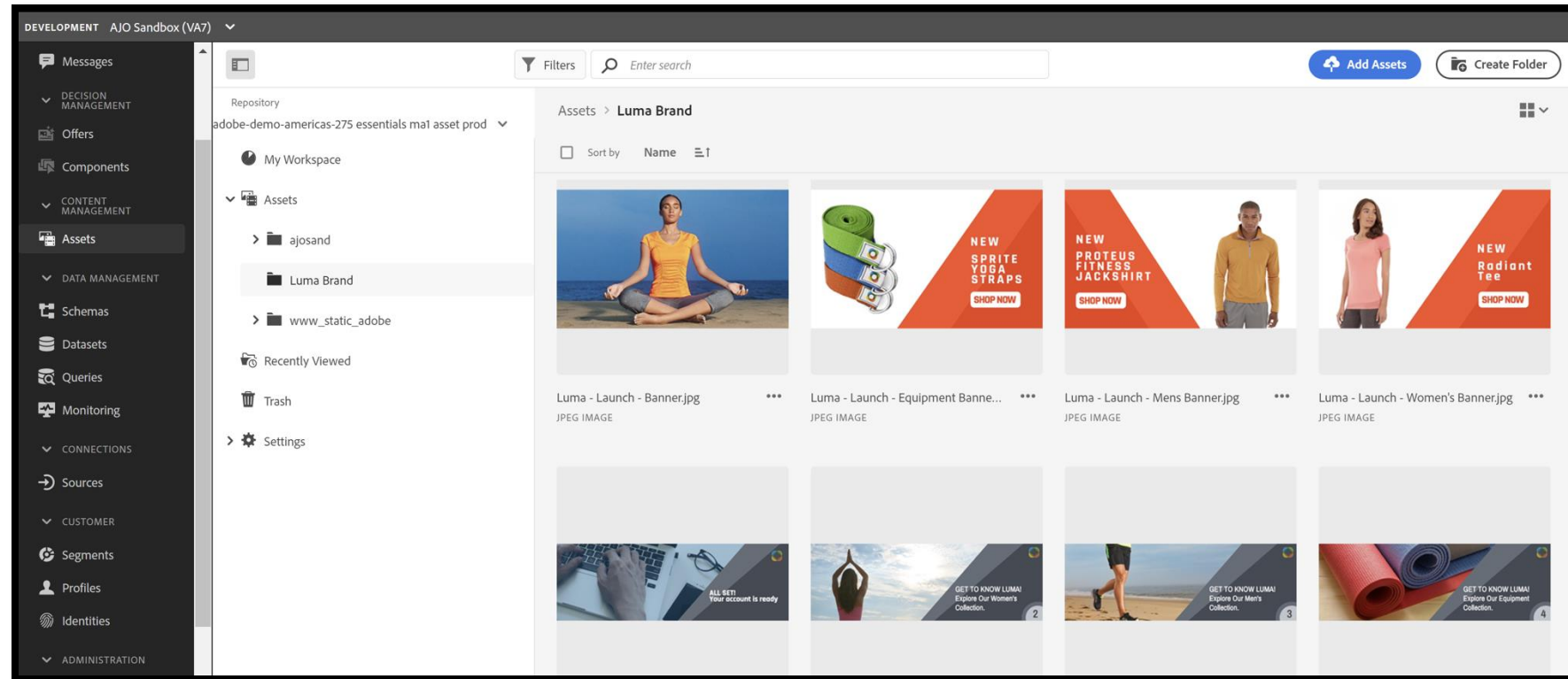
Bringing data, and system silos together within an organization to orchestrate coordinated experiences from acquisition through service

Content Authoring



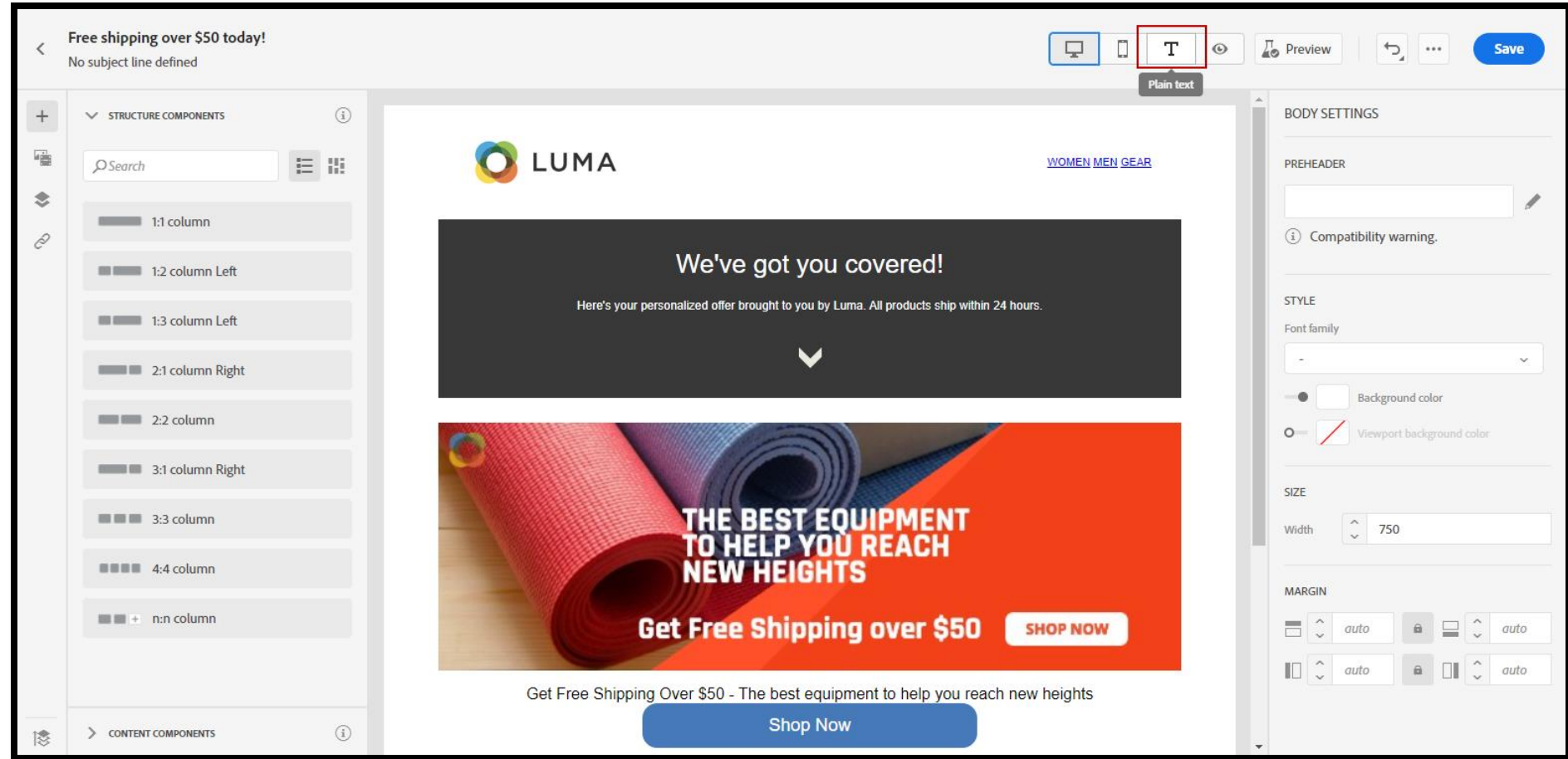
Asset Essentials Overview

- Assets Essentials provides a single, centralized repository of assets that you can use to populate your messages.
- It can be accessed directly from Adobe Journey Optimizer through the Assets section.



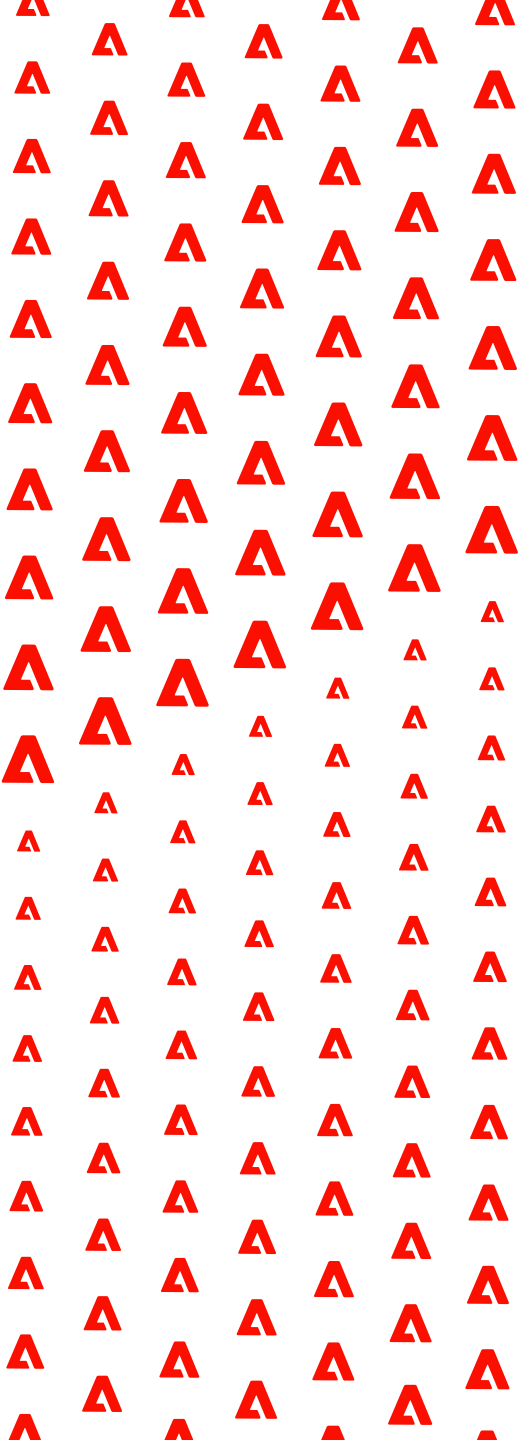
Email Content Templates and Fragments

- Create content fragments that can be used across multiple emails
- Create content templates to kick start email design
- Drag and drop email editor, supporting dynamic content and personalization
- Generative AI for enhanced text and imagery



Hands on Exercise

Campaigns



Campaigns

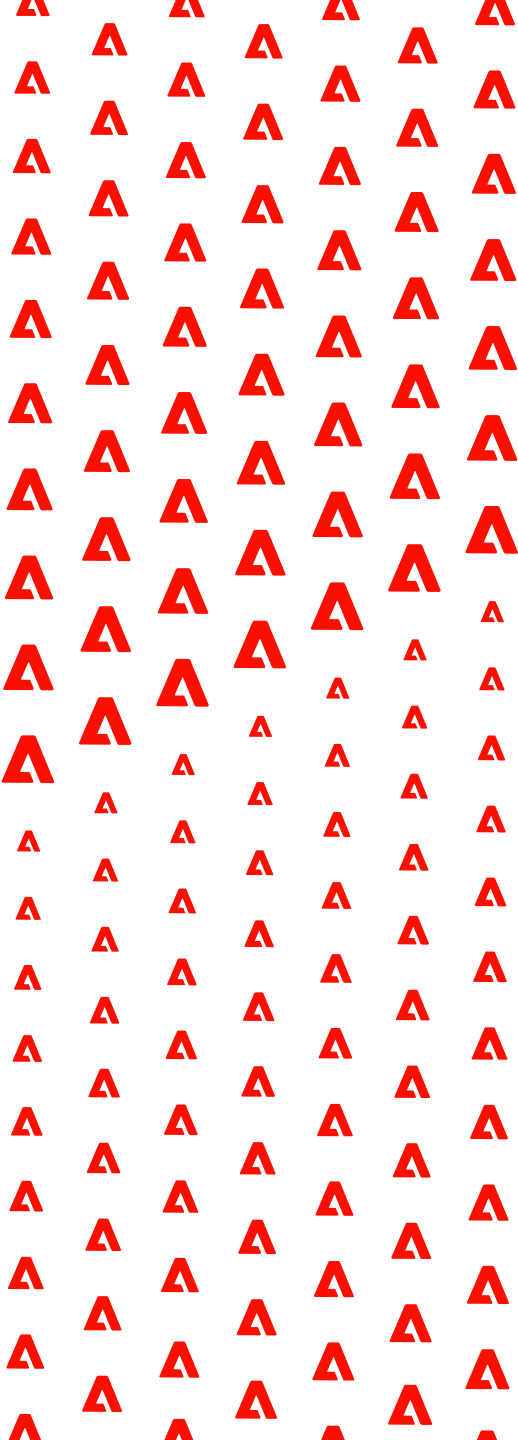
- Two types:
 - Scheduled (batch)
 - API triggered (transactional)
- Single Channel:
 - Email, inApp, Push, SMS, Web, Direct Mail, Code based experience
- Content Experimentation

The screenshot displays the Adobe Journey Optimizer interface. The top navigation bar includes the Adobe logo, the text 'Adobe Journey Optimizer', and a search bar labeled 'Search Experience Cloud (%+/-)'. The left sidebar contains a menu with categories: JOURNEY MANAGEMENT (Home, Campaigns, Journeys, Landing pages), DECISION MANAGEMENT (Offers, Components), CONTENT MANAGEMENT (Assets, Content templates, Fragments), and DATA MANAGEMENT (Schemas, Datasets, Queries, Monitoring). The 'Campaigns' section is active, showing a list of campaigns. The list has columns for Name, Status, and Channels. The campaigns listed are: 'Campaign - 2023-09-15 19:55:24 UTC+10:00' (Draft), 'HOL - Credit Card In App Popup' (Live), 'Zozo - Category Product Recs Example' (Draft), 'SB - Email Campaign - OG' (Draft), 'Campaign - 2022-11-24 17:20:00 UTC+11:00' (Draft), 'Market Trade XXX' (Draft), 'Zozo Product Example' (Draft), 'ZOZO - TEMPLATE TESTING - DO NOT DELETE' (Draft), and 'Retail Campaign - HH' (Draft). Each campaign has a status indicator (a dot) and a channel icon (an envelope or an 'A' in a square).

Name	Status	Channels
Campaign - 2023-09-15 19:55:24 UTC+10:00	Draft	✉
HOL - Credit Card In App Popup	Live	A
Zozo - Category Product Recs Example	Draft	✉
SB - Email Campaign - OG	Draft	✉
Campaign - 2022-11-24 17:20:00 UTC+11:00	Draft	✉
Market Trade XXX	Draft	✉
Zozo Product Example	Draft	✉
ZOZO - TEMPLATE TESTING - DO NOT DELETE	Draft	✉
Retail Campaign - HH	Draft	✉

Demo

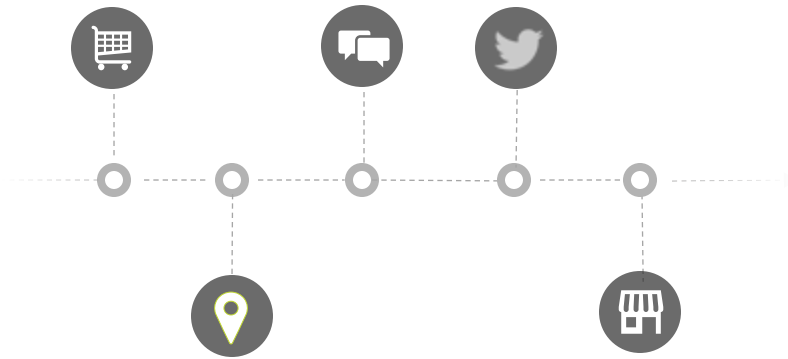
Journeys



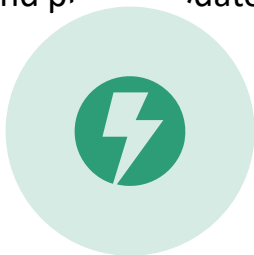
How we do it

1

Listen **EVENTS**



Each journey starts with a real-time event, which includes customer interactions and profile updates

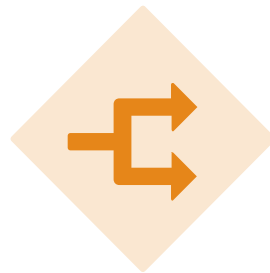


2

Orchestrate **JOURNEYS**

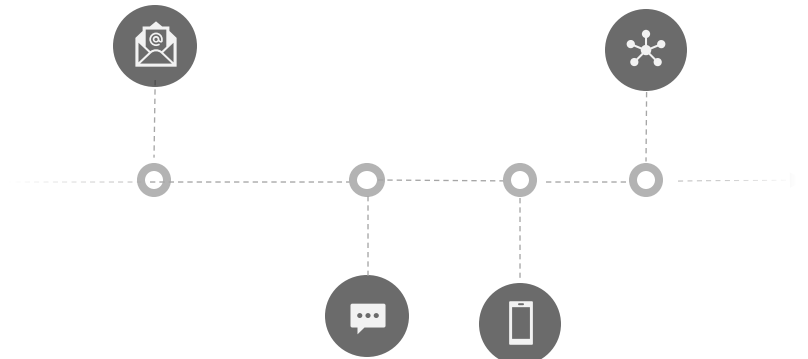


As events occur, applied conditions guide customers through the most optimal in-moment experiences

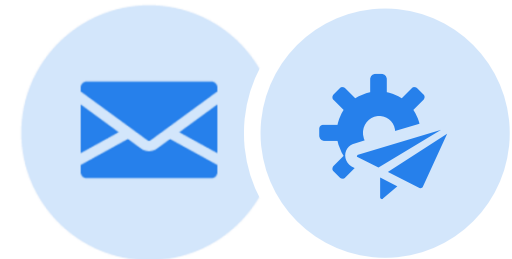


3

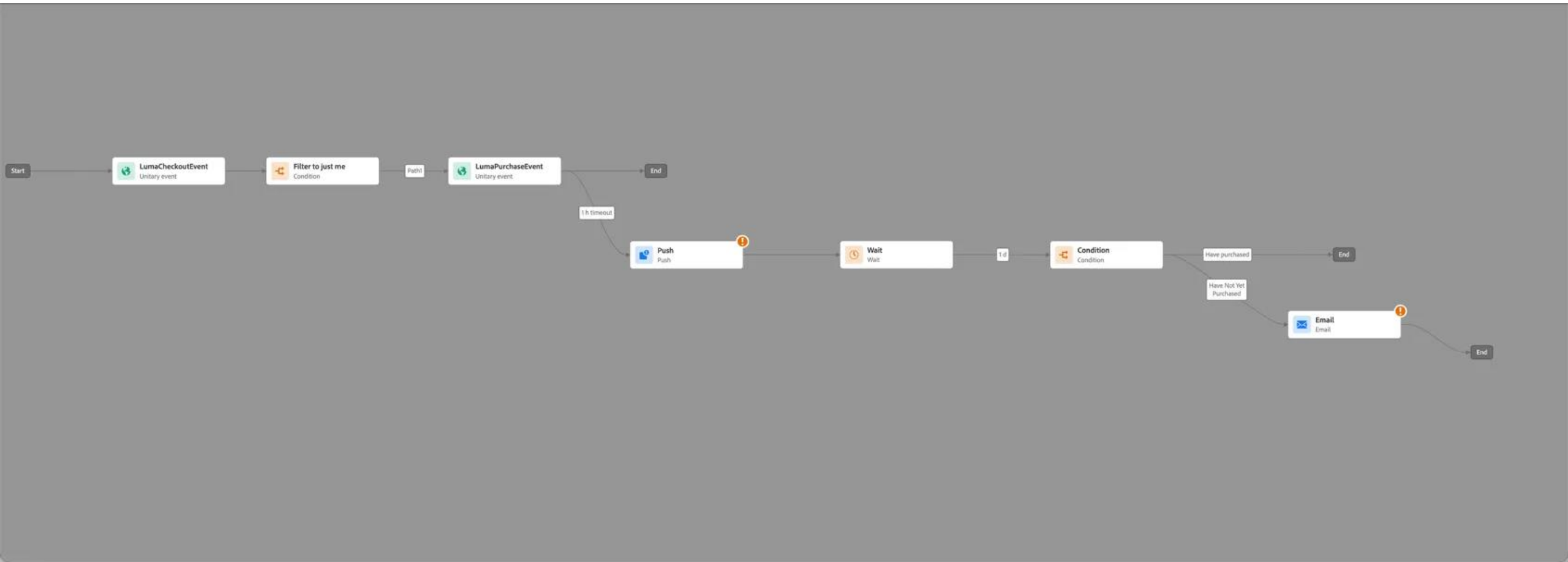
Personalize **EXPERIENCES**



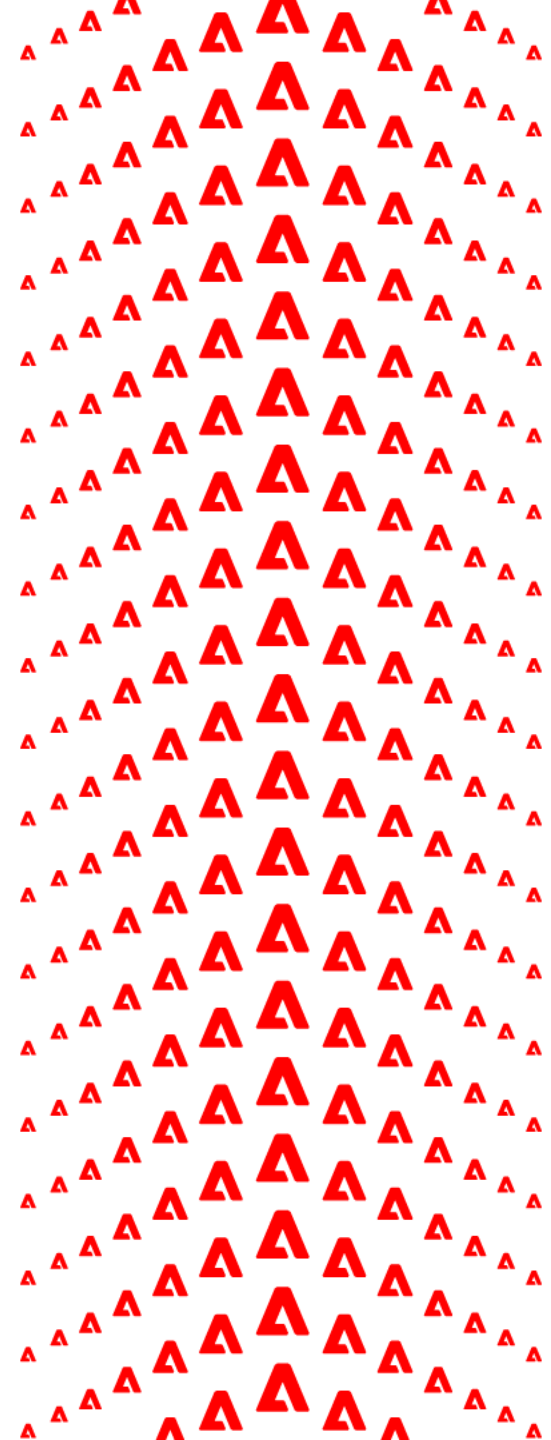
Based on the conditions, relevant experiences are delivered across all channels through any system



Hands on Exercise – Intelligent Re-engagement Journey



Offer Decisioning



Offers are more than just discounts

DISCOUNT & SALE



CYBER MONDAY.
THINK FAST. THE SAVINGS END 11/27

LEARNING

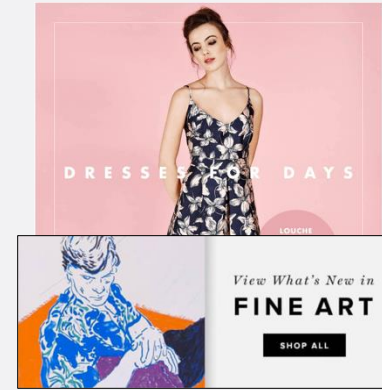


HOW TO MAKE A QUINOA EGG BAKE
A flavorful breakfast casserole

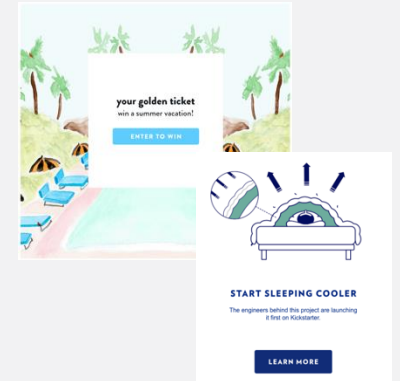
MESSAGE



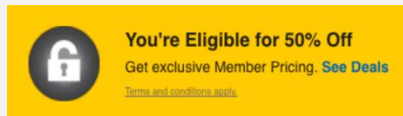
PRODUCT OFFER



BRAND PROMOTION



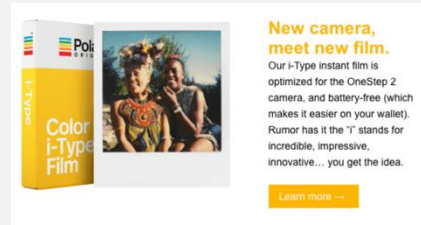
LOYALTY



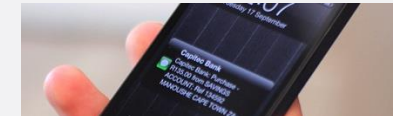
RETENTION



UPGRADE



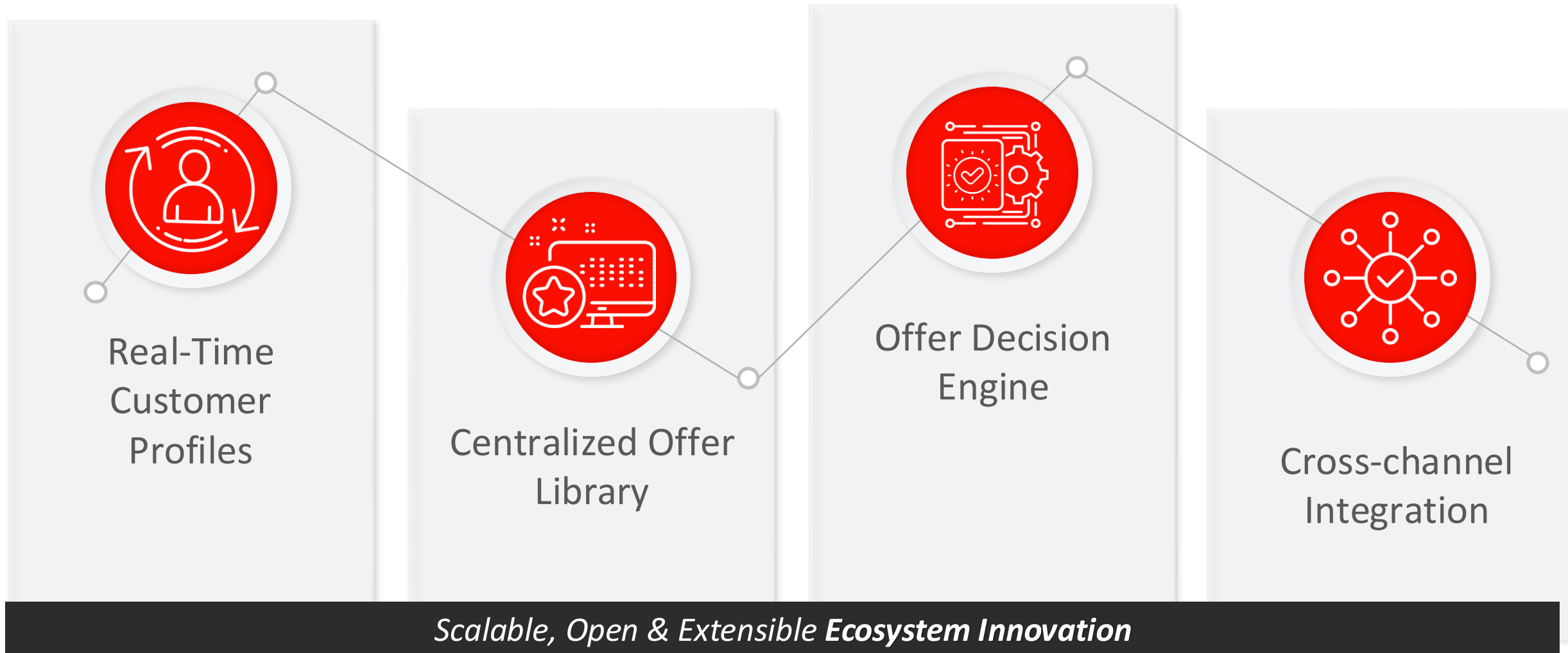
REMINDER



ACQUISITION



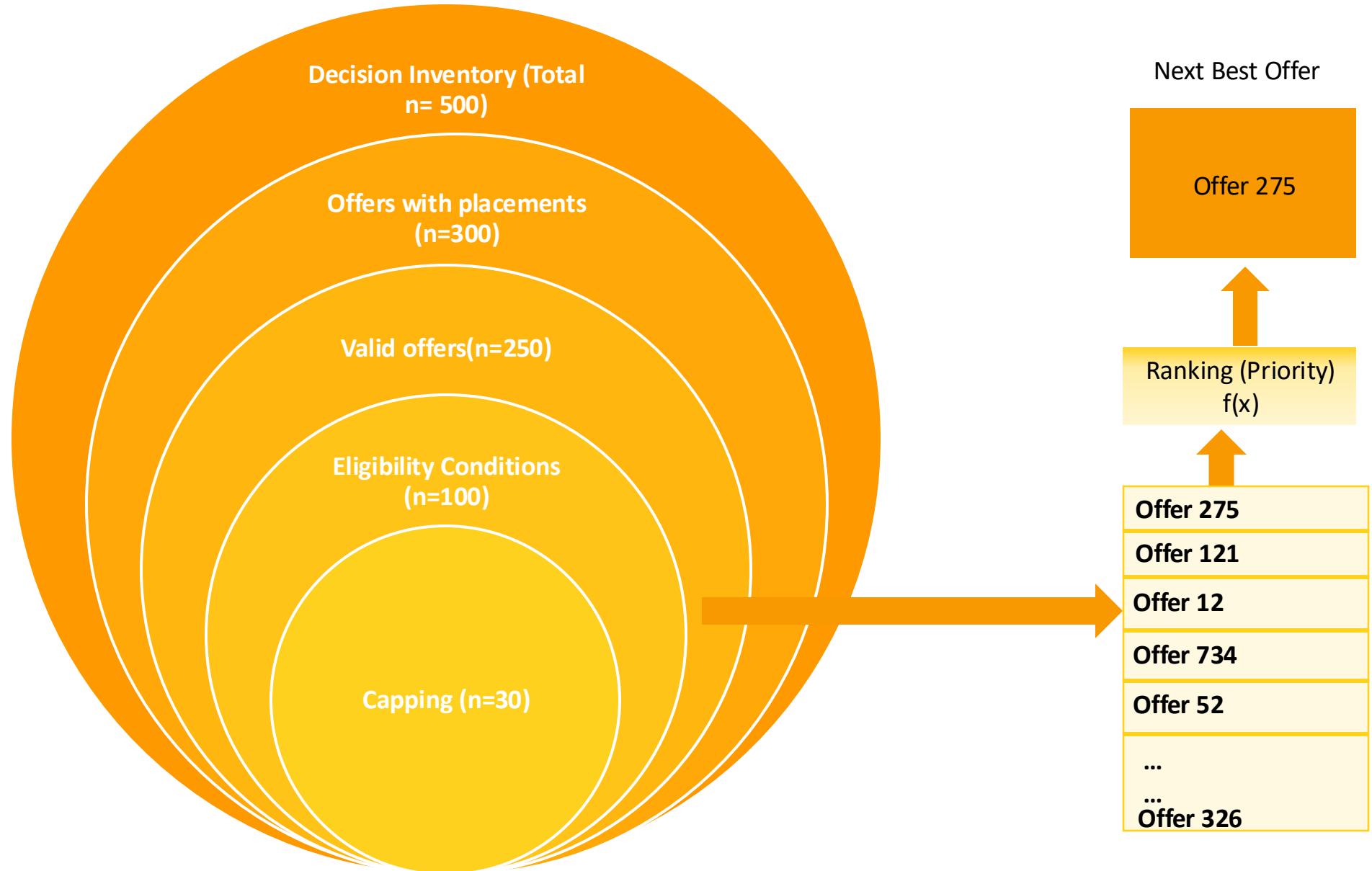
Offers in Adobe Journey Optimizer – Offer Decisioning



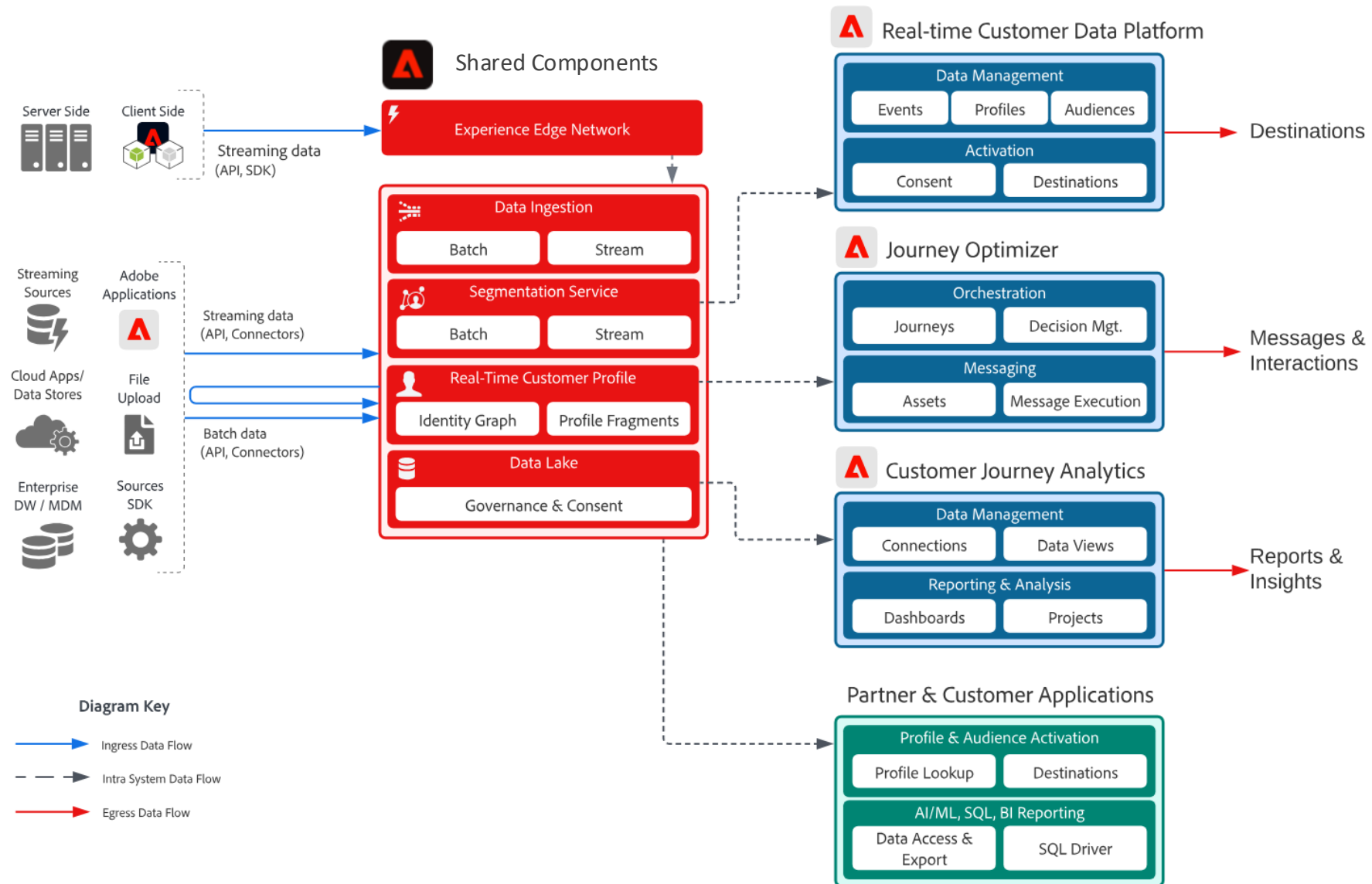
Demo

Offer Decisioning | Selection Process

Select the best offer for placement P1



Adobe Experience Platform – Native Applications



Customer Journey Analytics enables a full view of the customer journey



Customer Journey Analytics

Customer Journey Analytics combines data from disparate channels into a journey centric view that empowers Analysts and Marketers to quickly find answers to critical business questions.

Customer Journey Analytics | Common Use Cases

- Compare orders made on the web, in-app, in-store, and through a call center
- Call Center Deflection: Learn why website visitors call customer service
- Research online buy in store
- Omnichannel marketing attribution



Flexible configuration to identify ROBI Customers

Edit filter

Search component:

DIMENSIONS

Second

Birth Date (YYYY-MM-DD)

Month of Year

Purchase channel

Day

Show all

METRICS

Events

First-time Sessions

Return Sessions

Sessions

Session Ends

Show all

FILTERS

All Data

Show all

DATE RANGES

Title *

ROBI customers

Description

Enter a description for this filter

Tags

Search tags

Definition *

Include

Person

Include Everyone

Options

Page Views

equals

Then

Within

3

Day(s)

Online Purchases does not exist AND In Store Purchases exists

Online Purchases

does not exist

And

In Store Purchases

exists

* All fields with an asterisk are required in order to save.

Owner: Fabien Cherot

Last modified: Jun 19, 2023

0 of 0

0%

0 of 0

0%

0 of 0

0%

*Last 90 days

Potential ROBI Dashboards

Purchase avg value for ROBI and other customers

● ROBIs KPI vs other

Difference Avg purchase value for ROBI and other.
NB : Number of products is not correct as not captured properly for Web event on this period.

	People	In Store Purchases	Online Purchases	Revenue	Avg purchase value	Purchase per profile	nb Product	Nb Product per profile
Filters ↑ Page: 1 / 1 Rows: 400 1-5 o	 1,861,708	 5,502,928	 1,538,915	 606,472,806	 445	 22.7	 58,013,167	 168.3
1. All Data	925,532 49.7%	2,373,205 43.1%	547,369 35.6%	241,496,951 39.8%	83 18.6%	3.2 13.9%	25,474,373 43.9%	27.5 16.4%
2. In store purchasers	644,229 34.6%	2,373,205 43.1%	314,236 20.4%	199,164,078 32.8%	74 16.7%	4.2 18.3%	25,401,063 43.8%	39.4 23.4%
3. Online purchasers	182,225 9.8%	257,360 4.7%	547,369 35.6%	115,427,169 19.0%	143 32.2%	4.4 19.4%	2,352,028 4.1%	12.9 7.7%
4. Pure ROBI	39,975 2.1%	184,844 3.4%	0 0.0%	9,887,361 1.6%	53 12.0%	4.6 20.3%	1,860,146 3.2%	46.5 27.6%
5. ROBI customers	69,747 3.7%	314,314 5.7%	129,941 8.4%	40,497,246 6.7%	91 20.5%	6.4 28.0%	2,925,557 5.0%	41.9 24.9%

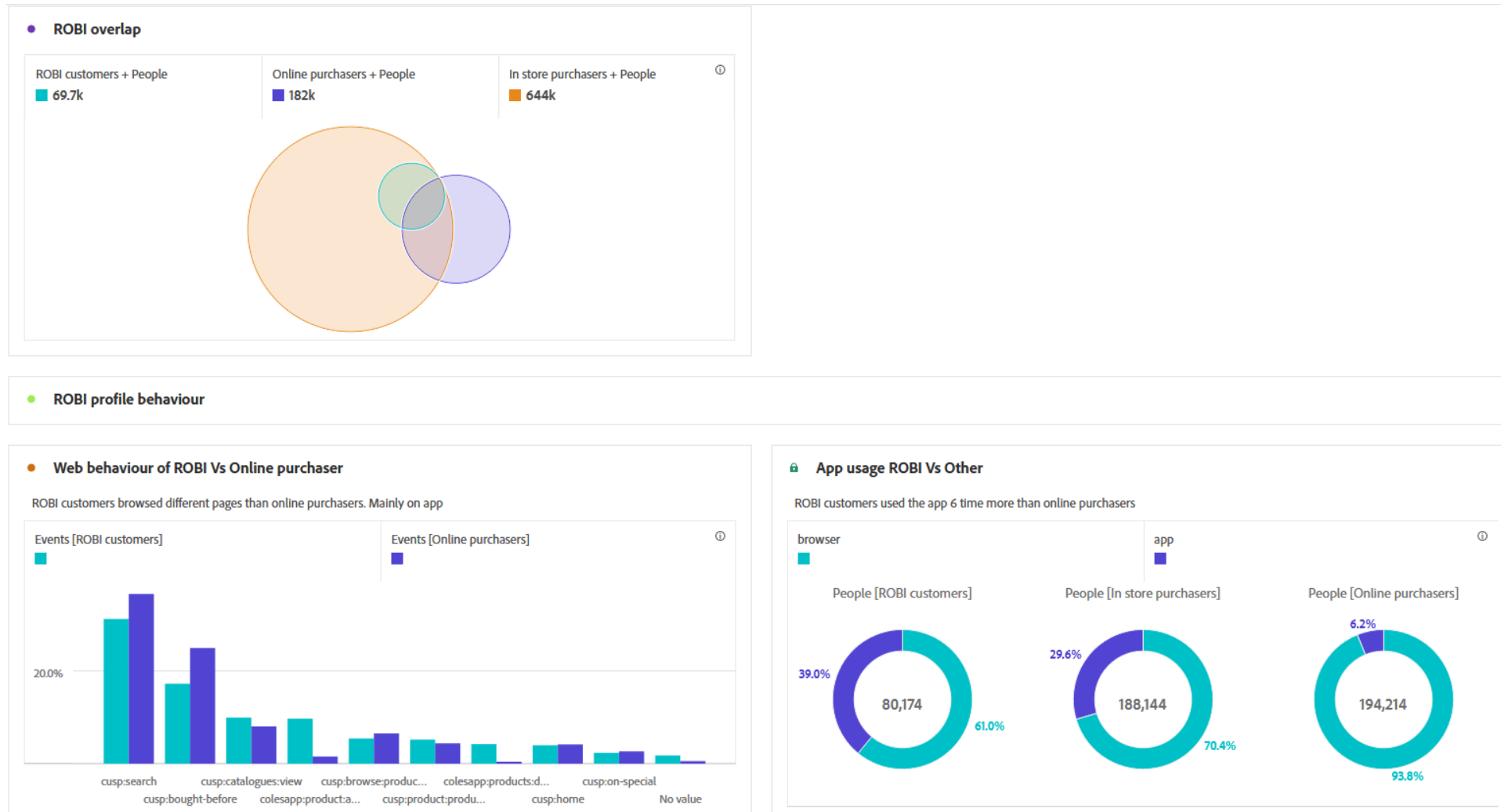
● Online Vs Offline Purchase for each segment

	Events	People	Avg purchase value					Purchase per profile
			All Data	Pure ROBI	ROBI customers	In store purchasers	Online purchasers	
Purchase chanel Page: 1 / 1 Rows: 50 1-2 of:	 2,920,574 out of 66,385,448	 750,011 out of 925,532	 83 out of 83	 53 out of 53	 91 out of 91	 74 out of 74	 143 out of 143	 3.9 out of 3.2
1. Instore Purchase	2,373,205 81.3%	644,229 85.9%	58 70.6%	53 100.0%	50 54.9%	58 78.8%	49 34.0%	3.7 94.6%
2. Online purchase	547,369 18.7%	182,225 24.3%	188 227.3%	Invalid	191 209.2%	193 259.9%	188 131.0%	3.0 77.1%



Potential ROBI Dashboards

- Segment overlap and online behaviors for ROBI vs other



Data Flexibility & Transformation

- **Connect different datasets in separate data views based on analysis use case, and further adjust settings and permissions**
- **Specify the dimensions and metrics** available in Analysis Workspace and where the data comes from
- **Change metrics to dimensions and vice versa**, apply formatting, adjust attribution and lookback windows in a non-destructive way

Customer Journey Analytics Projects Connections Data views Components Tools Labs Provide feedback Adobe

Data views > DV 001

Configure Components Settings

Connection
Conn 001

Schema fields Standard compone

Search schema fiel...

Contains data X

Is not deprecated X

Schema fields (91 items) + Add all

Profile datasets >

Event datasets >

Adobe lookups >

Included components (228)

Search components

METRICS (47)

COMPONENT NAME	DATASET	SCHEMA DATA TYPE	SCHEMA PATH	ATTRIBUTION
Longitude	Reduced W...	Double	...a.longitude	--
Latitude	Reduced W...	Double	...ma.latitude	--
Calls	Call Center ...	Integer	...ails.callFlag	--
call length	Call Center	Integer	s call length	--

DIMENSIONS (181)

COMPONENT NAME	DATASET	SCHEMA DATA TYPE	SCHEMA PATH	PERSISTENCE
Status	CRM Profile...	String	...Email.status	--
CRMIDCom...	CRM Profile...	String	...MIDCombo	--
Validity	CRM Profile...	String	...one.validity	--
Call ID	Call Center	String	etails.callID	--

Help Terms of Use Privacy policy Language: English © 2022 Adobe. All Rights Reserved

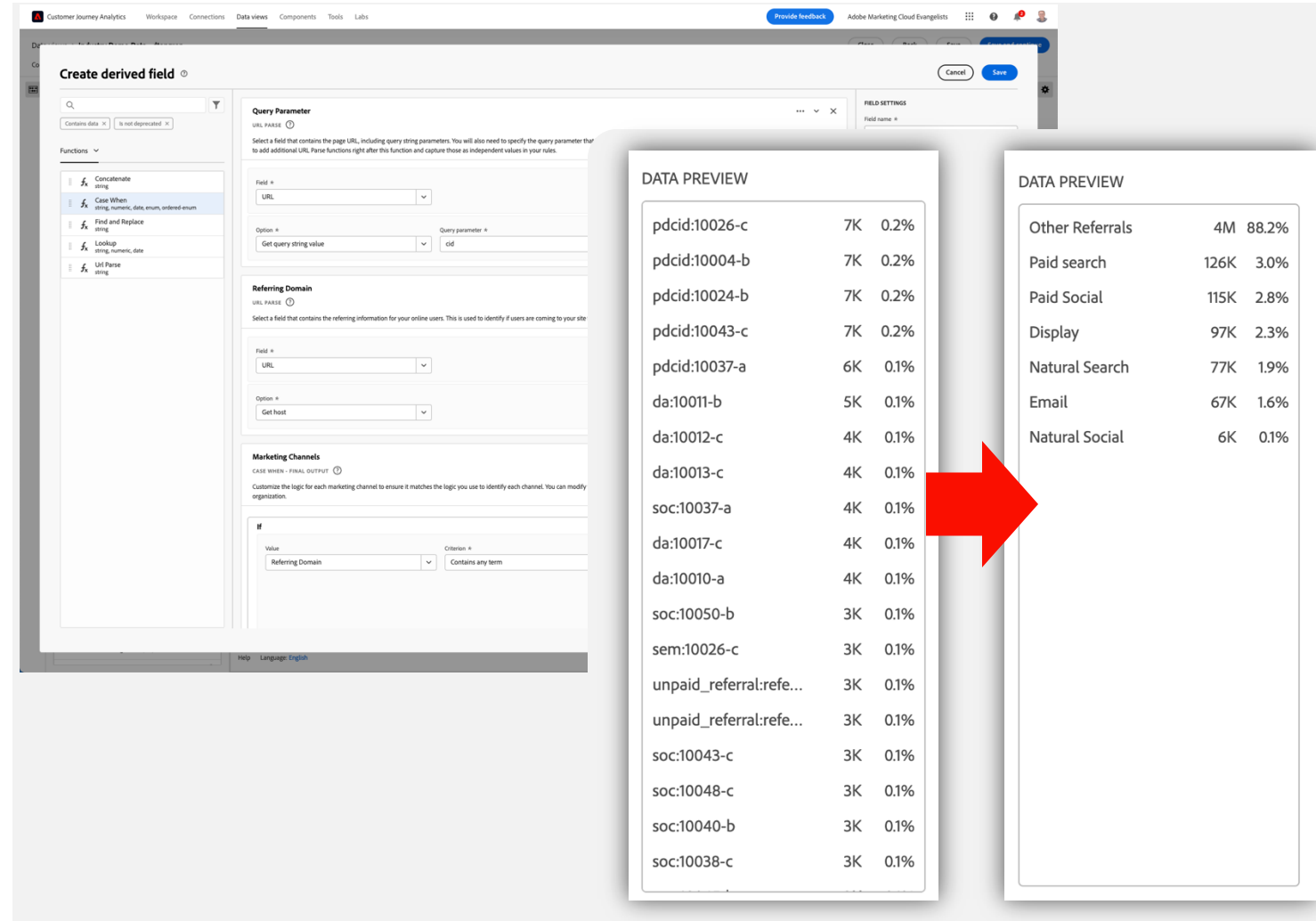
Derived Fields

Significantly reduce costly IT cycles for sophisticated data updates –speeding up time to insight

Use a customizable rule-builder to **instantly and retroactively apply complex data changes on-the-fly**, without the need to rewrite and re-ingest data

Build marketing channels reports and do on-the-fly classifications

Create new dimensions or metrics from multiple fields, rename field values to those of your choice, or fix errant data



Create derived field

Query Parameter

URL PARAMETER

Select a field that contains the page URL, including query string parameters. You will also need to specify the query parameter that to add additional URL Parse functions right after this function and capture those as independent values in your rules.

Field: URL

Option: Get query string value

Query parameter: cid

Referring Domain

URL PARAMETER

Select a field that contains the referring information for your online users. This is used to identify if users are coming to your site.

Field: URL

Option: Get host

Marketing Channels

CASE WHEN - FINAL OUTPUT

Customize the logic for each marketing channel to ensure it matches the logic you use to identify each channel. You can modify organization.

If

Value: Referring Domain

Criterion: Contains any term

DATA PREVIEW

pdcid:10026-c	7K	0.2%
pdcid:10004-b	7K	0.2%
pdcid:10024-b	7K	0.2%
pdcid:10043-c	7K	0.2%
pdcid:10037-a	6K	0.1%
da:10011-b	5K	0.1%
da:10012-c	4K	0.1%
da:10013-c	4K	0.1%
soc:10037-a	4K	0.1%
da:10017-c	4K	0.1%
da:10010-a	4K	0.1%
soc:10050-b	3K	0.1%
sem:10026-c	3K	0.1%
unpaid_referral:refe...	3K	0.1%
unpaid_referral:refe...	3K	0.1%
soc:10043-c	3K	0.1%
soc:10048-c	3K	0.1%
soc:10040-b	3K	0.1%
soc:10038-c	3K	0.1%

DATA PREVIEW

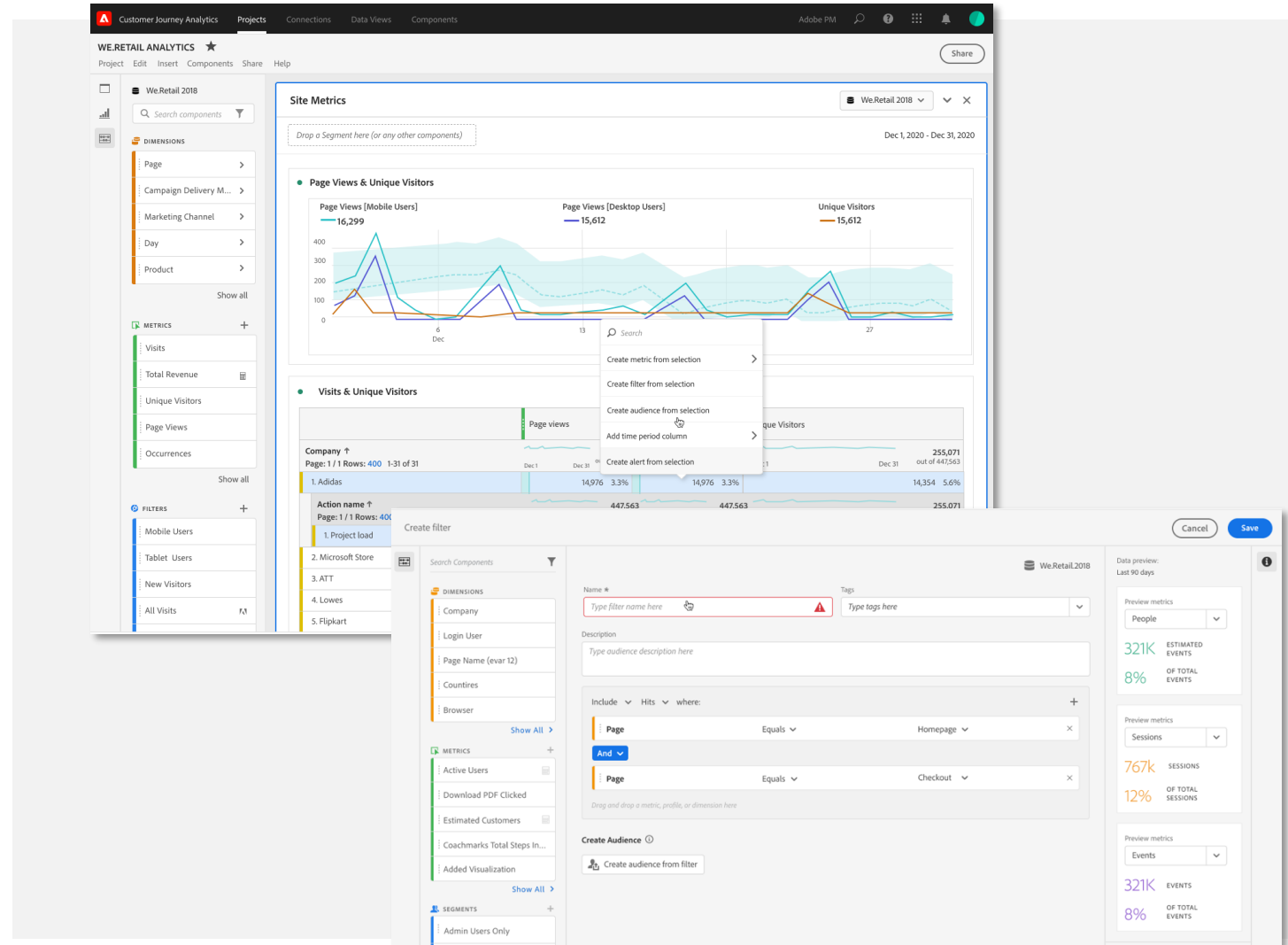
Other Referrals	4M	88.2%
Paid search	126K	3.0%
Paid Social	115K	2.8%
Display	97K	2.3%
Natural Search	77K	1.9%
Email	67K	1.6%
Natural Social	6K	0.1%

Audience Publishing

Seamlessly shares audiences derived from omni-channel insights for activation and orchestration

Create insight-driven audiences based on specific actions using multiple filters simultaneously and looking back over time.

Activate the audiences for journeys in Adobe Journey Optimizer or export to a variety of destinations through Adobe Real-Time CDP



Demo and optional Hands-on Exercise

Survey

