Adobe Data Collaboration Forum | Hands-on Lab

1. Content and Agenda

Adobe Real-Time CDP Collaboration

Overview

The **Real-Time CDP Collaboration** hands-on lab is designed to demonstrate the supported capabilities in the new workspace and the workflows of two collaborators; an advertiser and a publisher.

Lab Content

AdobeDataCollaborationForum_Lab.pdf

Agenda

- User Access
- Real-Time CDP Collaboration Overview
- Key Collaboration Patterns
- End-to-End Workflow
- Key Terms
- Lab Exercise

2. Brand or Advertiser Workflow

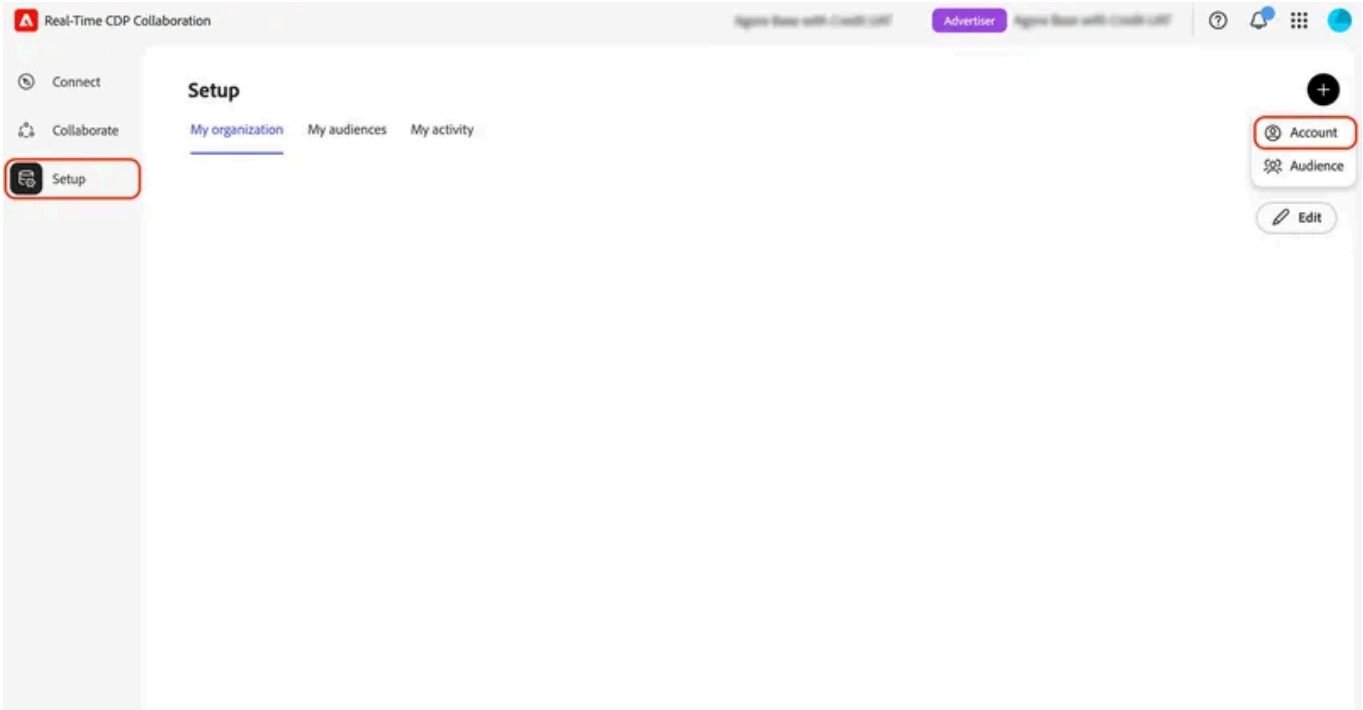
In this exercise, you will learn how to configure a RTCDP Collaboration workflow. The goal is to share an audience with a publisher you have discovered in the Collaboration UI

Configuration Flow

1. Onboard your company
2. Add a new data connection
3. Discover partner and send invite
4. Create a project
5. View overlap report and other insights
6. Share audience

2.1. Onboard your company

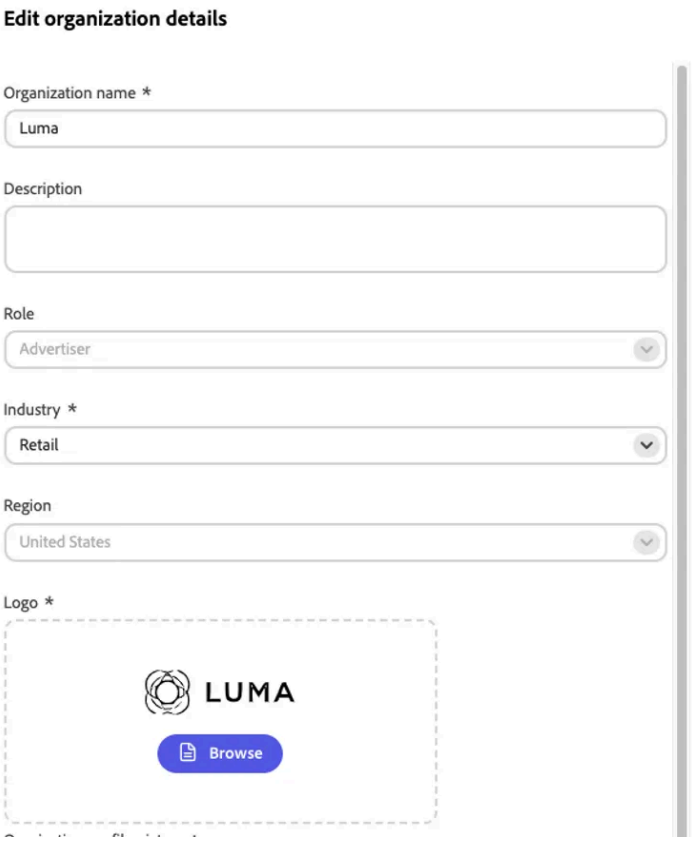
The initial setup of your organization happens once. Click the Setup button on the lefthand side then the + button to add a new organization.



Enter organization details

Name: **Luma** *+ your initials:*

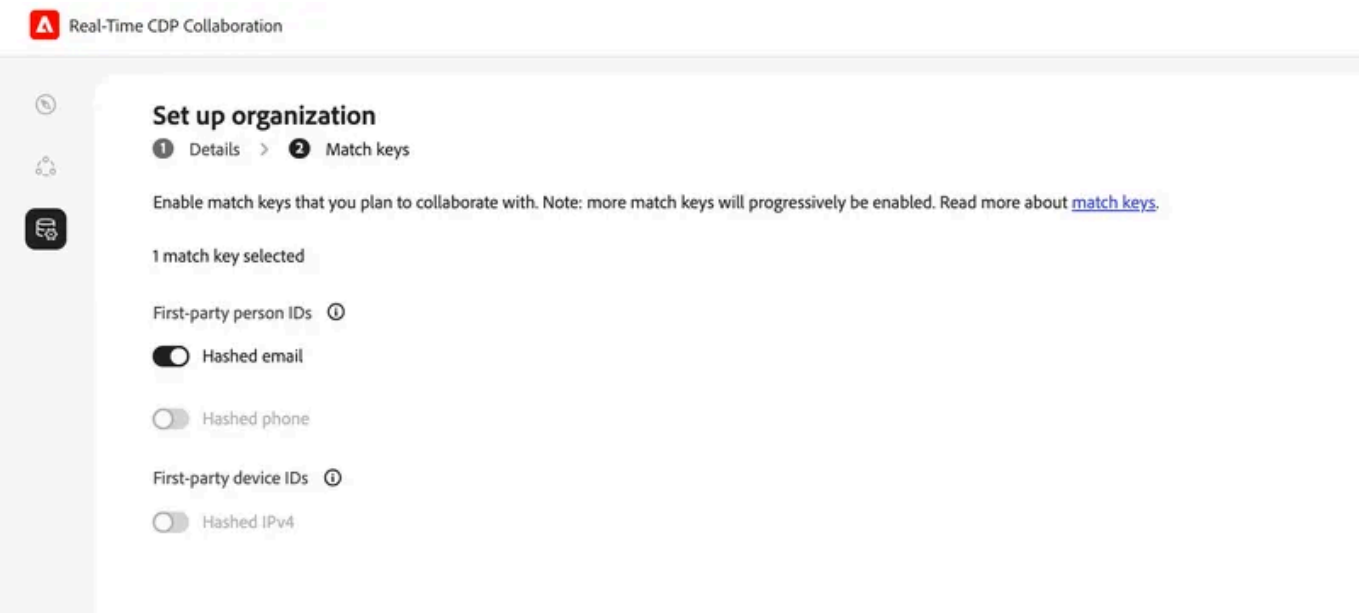
Industry: **Retail**



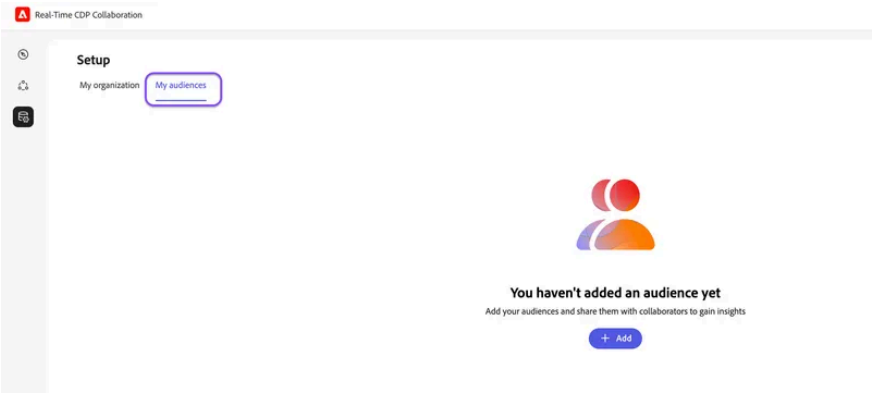
Add Match keys

Match keys are identifiers used to reconcile members across audiences from different data sources. Include any match keys that your company can work with.

Select **Hashed email** and click **Complete**.



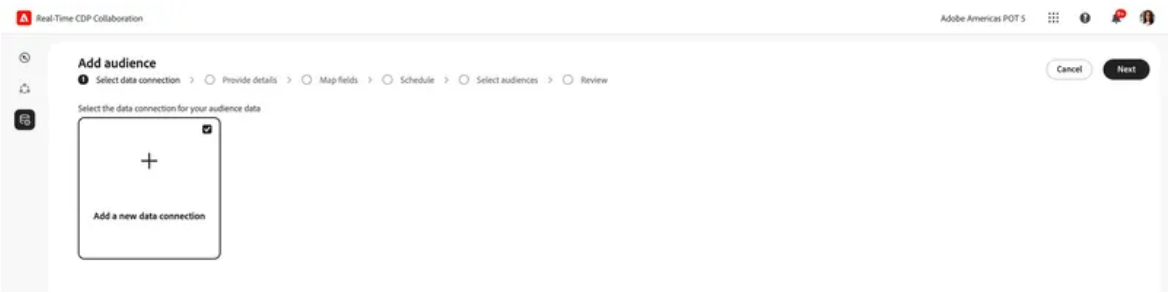
Click the **My audiences** tab and the **+ Add** button to start importing your audiences



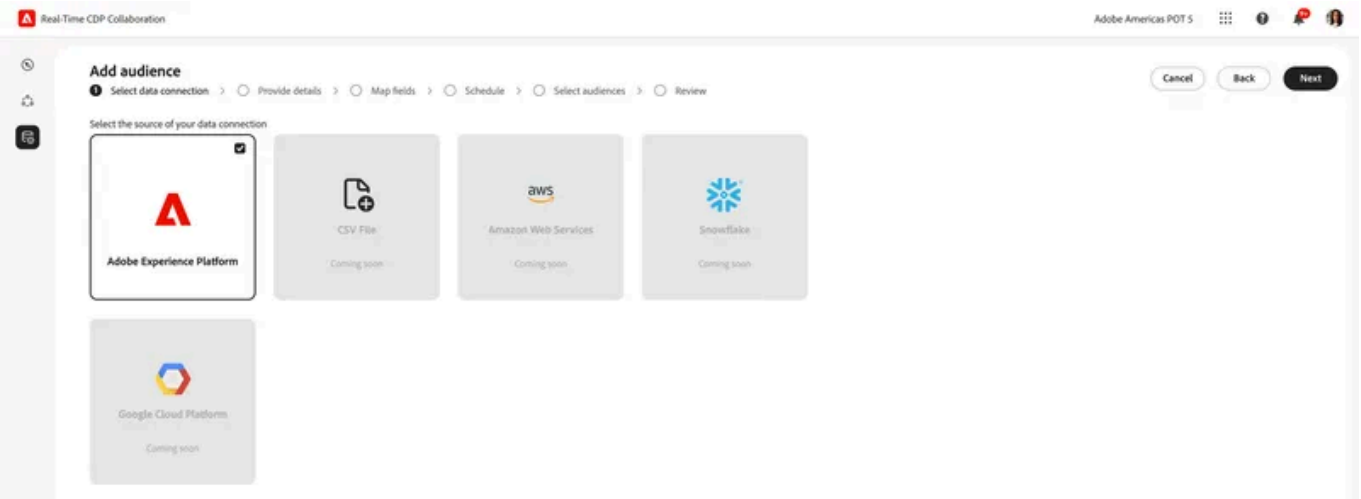
https://experienceleague.adobe.com/en/docs/real-time-cdp-collaboration/using/setup/onboard-audiences

2.2. Add a new data connection

Select the **Add a new data conection** button and hit **Next**



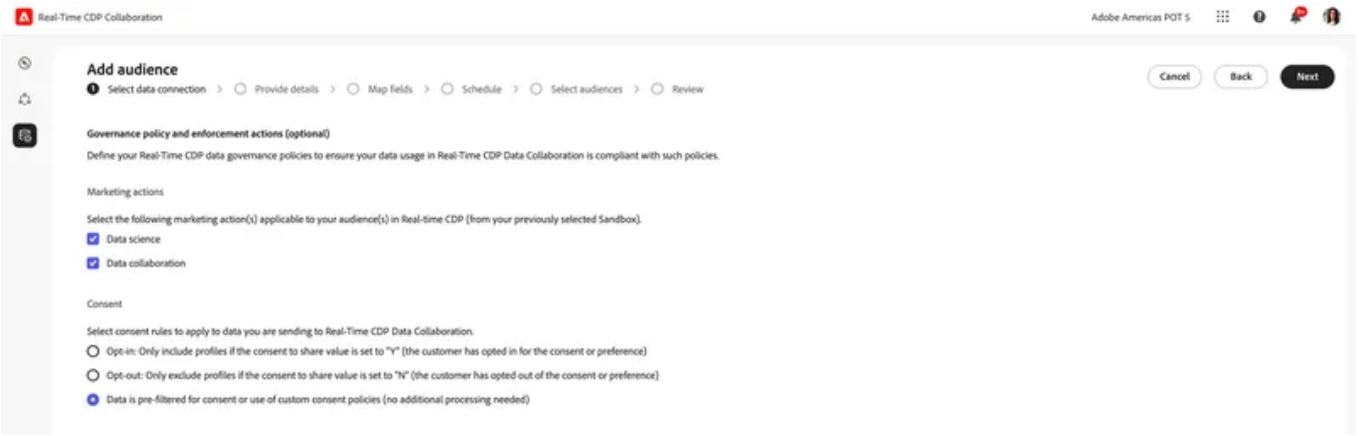
Select the **Adobe Experience Platform** data connection and hit **Next**



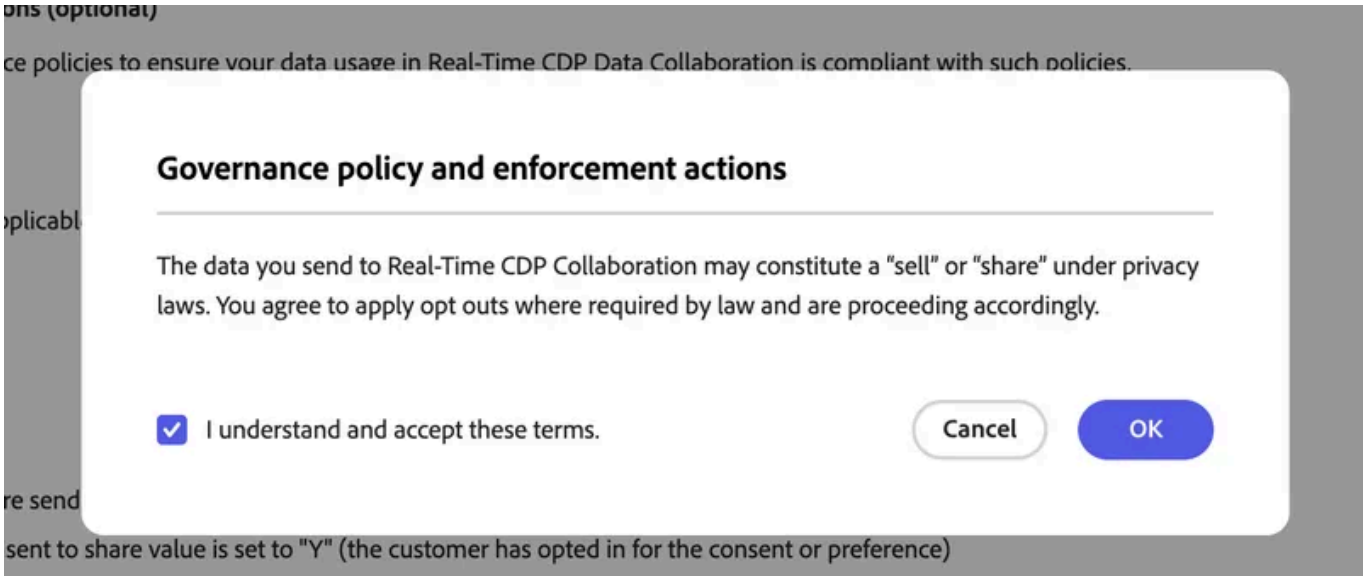
A list of sandboxes should appear. Find and select the appropriate sandbox where your audience is stored. For this exercise, find and select **Collaboration-Brand** sandbox. Hit **Next**

The following step allows you to set governance controls around your audience data

- Select the appropriate marketing action
    - select **Data Science** and **Data Collaboration**
- Select the consent rule
    - select **"Data is pre-filtered for consent..."**



Agree to the following terms and hit **Next**



Name your data connection: **Leave the defaulted value and *add your initials***

Provide a name and description for your data connection.

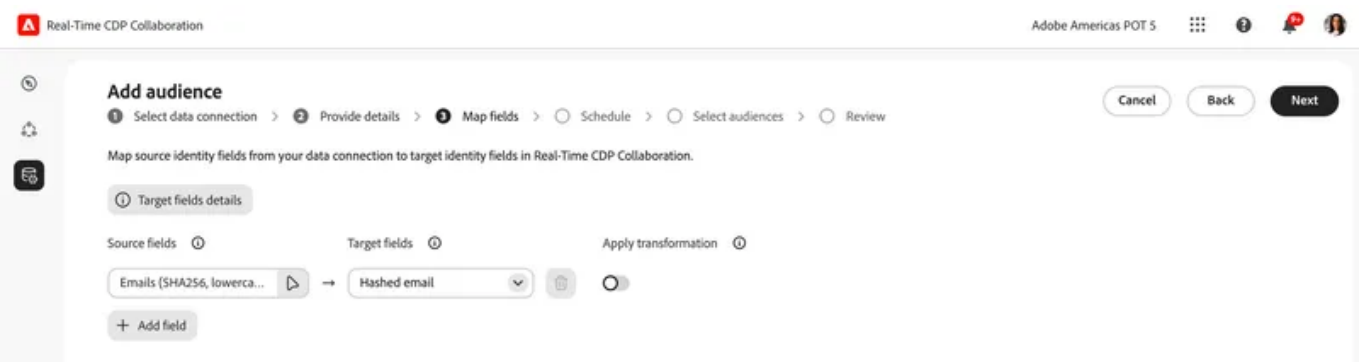
Data connection name *

collaboration-brand-SS

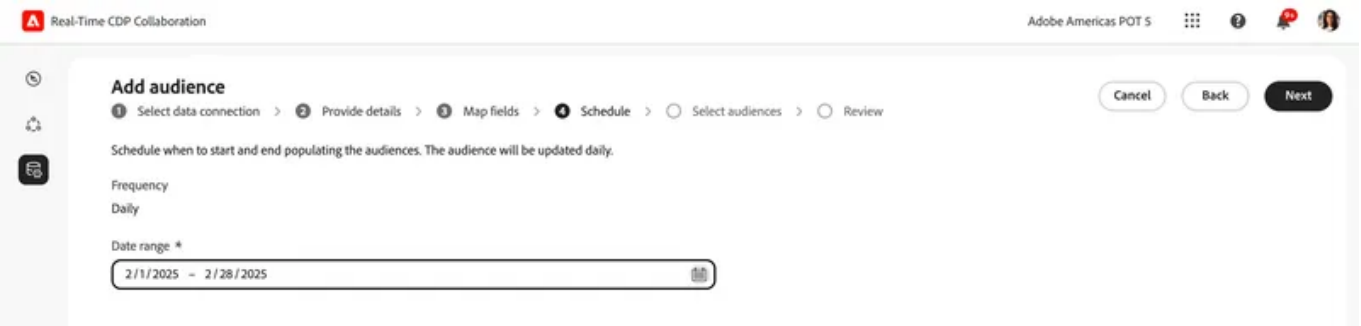
Data connection description

In the following step, add a mapped source field for the expected match key of **hashed email.** To do so, find and search for the corresponding identity namespace. Hit **Next**

Search **"email"** to find and select the hashed email identity namespace: **Emails (Sha256, lowercase)**

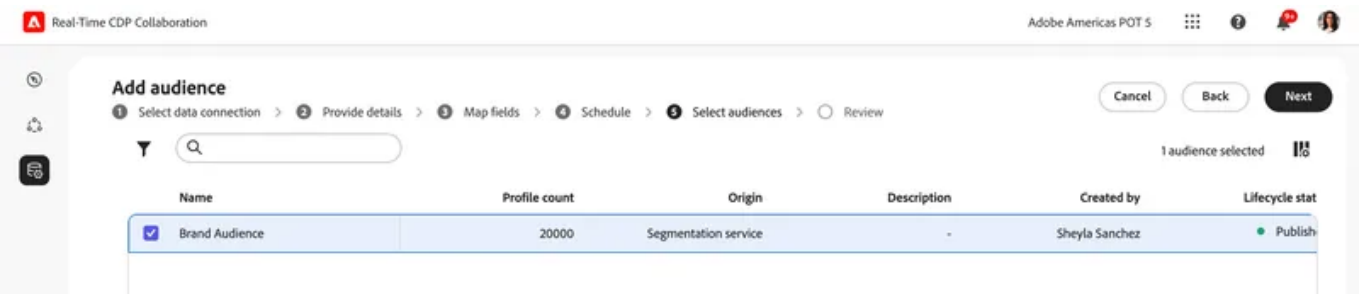


Schedule your data connection: **add the current data through the end of the month**.

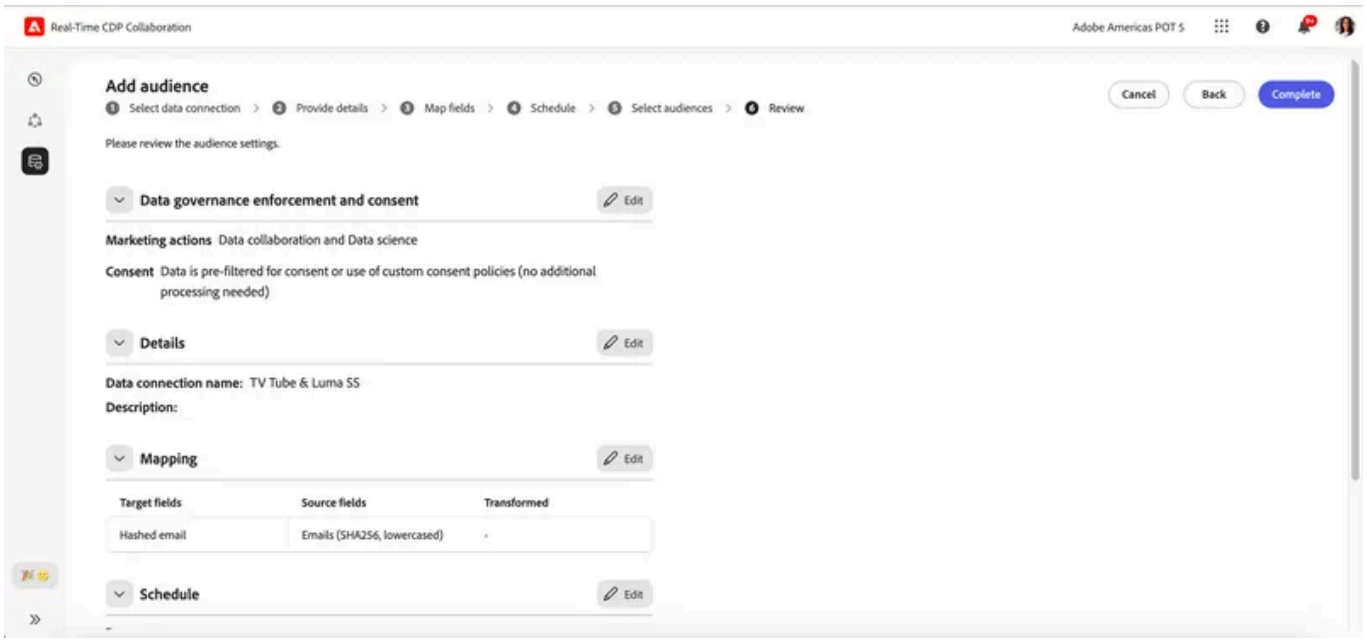


Find and select the audience to share then hit **Next**

Find and select **Loyalty Members**.



Review your configuration and hit **Complete**



Your data connection setup is complete. Click **Manage data connections** to view the details to be shared with your collaboration partner

2.3. Discover Collaborators and Send Invite

Before collaborators can work together on campaigns, they must establish a connection. This connection allows them to activate audiences, create projects, and run reports on campaign performance.

Connections are established based on your chosen collaboration pattern. Collaboration supports two key collaboration patterns: advertiser-to-publisher and brand-to-brand.

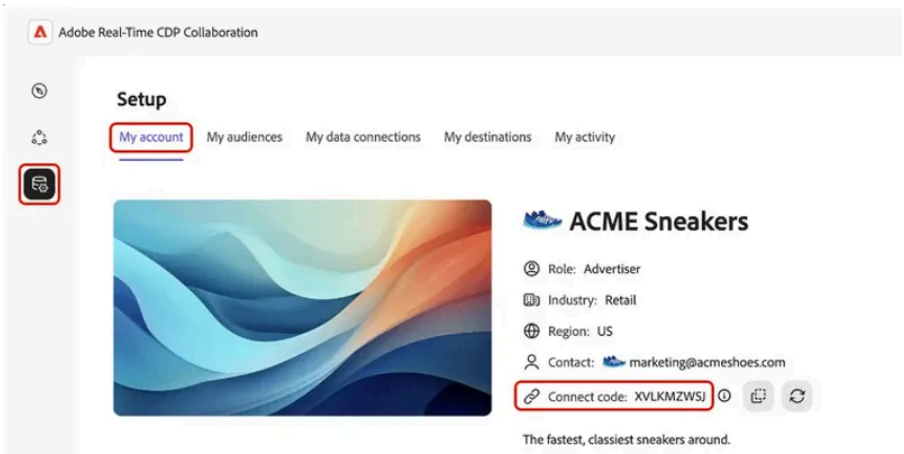
Only advertisers can discover publishers using the **Discover collaborators** workspace.

Private connection invite [Demo]

Private connection invites allow you to connect with collaborators you've communicated with outside of the product using a **Connect code**. To form a private connection, you need to obtain the **Connect code** from the collaborator you want to connect with outside of the product. You can then use this code to send a private connection invite to the collaborator in the **Connect** workspace.

Connect code

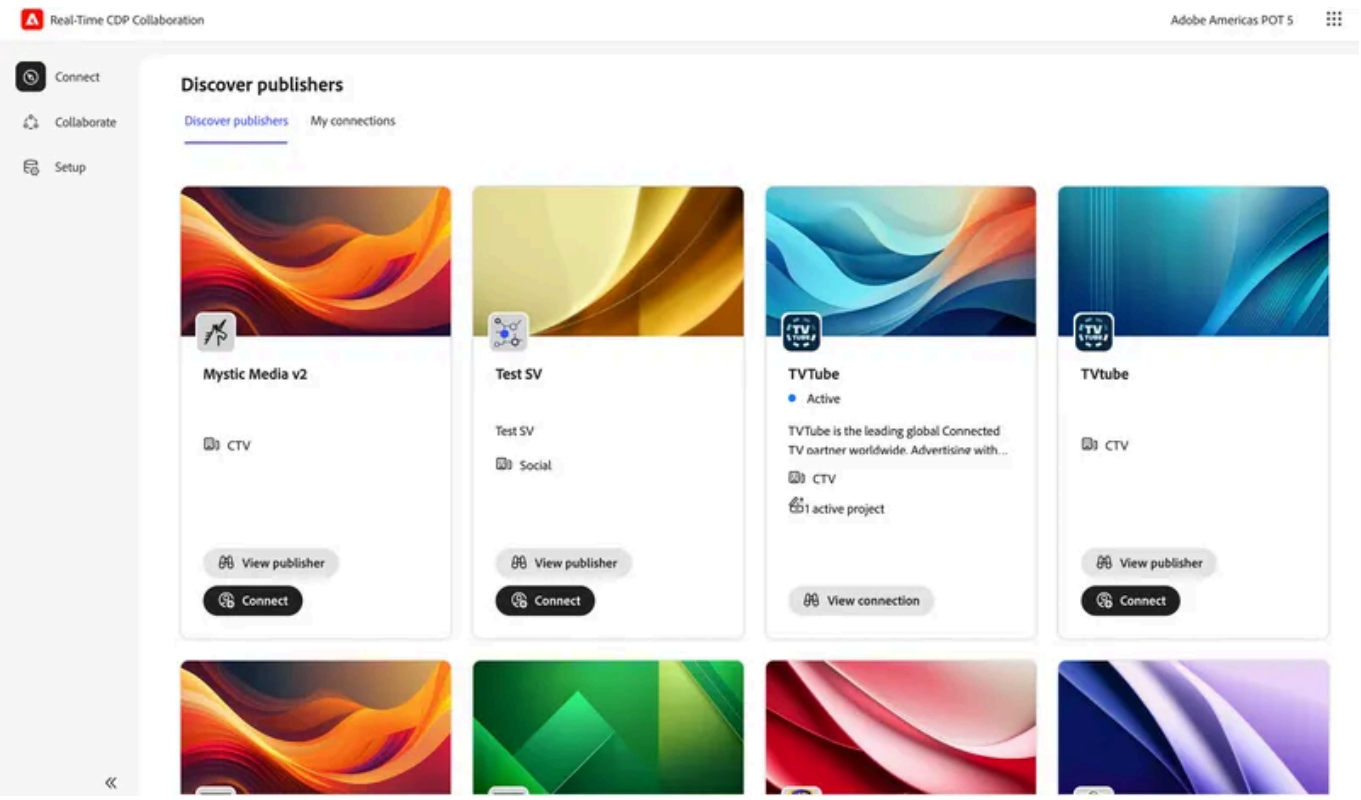
Before you can send a private connection invite, your desired collaborator must provide you their unique **Connect code**. To find and copy your **Connect code**, navigate to the **My account** tab within in the **Setup** workspace. The **Connect code** is displayed within your account details.



[Demo] Watch as we demonstrate how to connect with a collaborator privately using the UI's connect code.

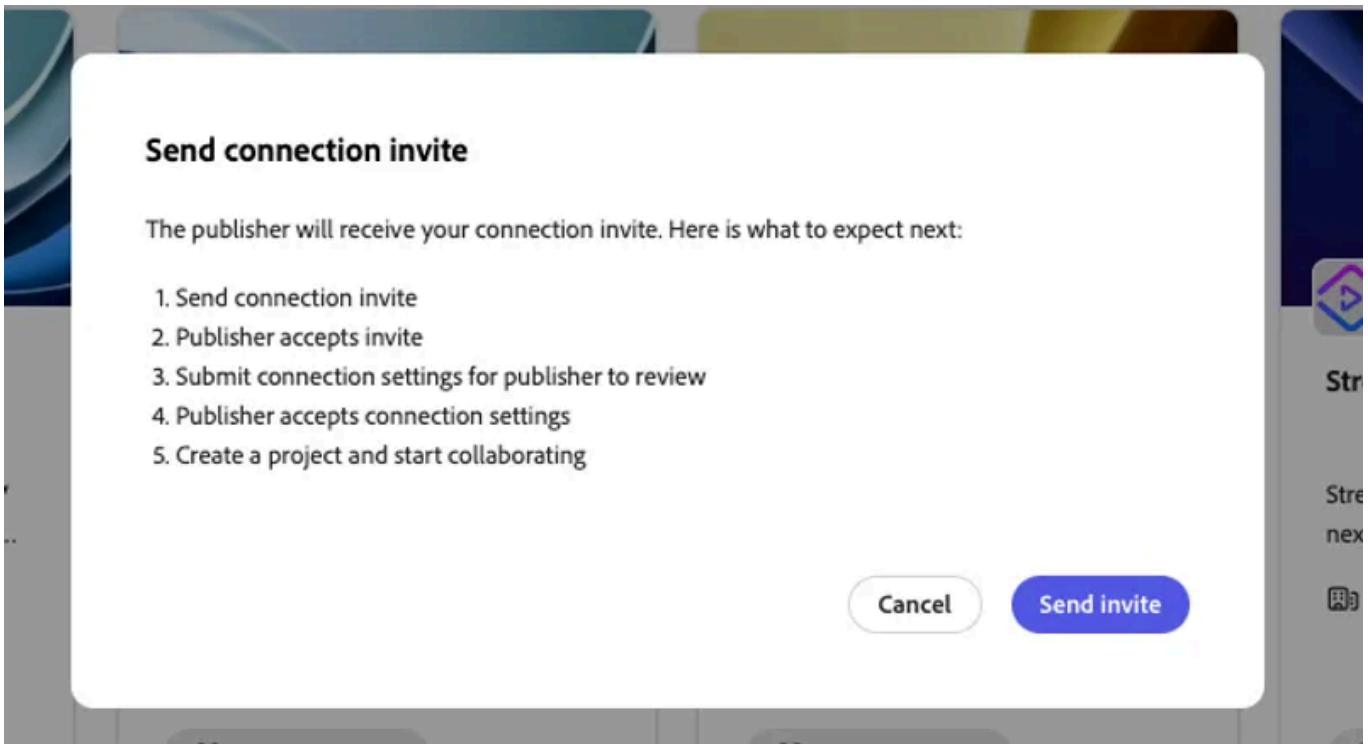
Discover publishers and invite [Exercise]

Use the Discover catalog to explore publishers available in the Collaboration workspace.

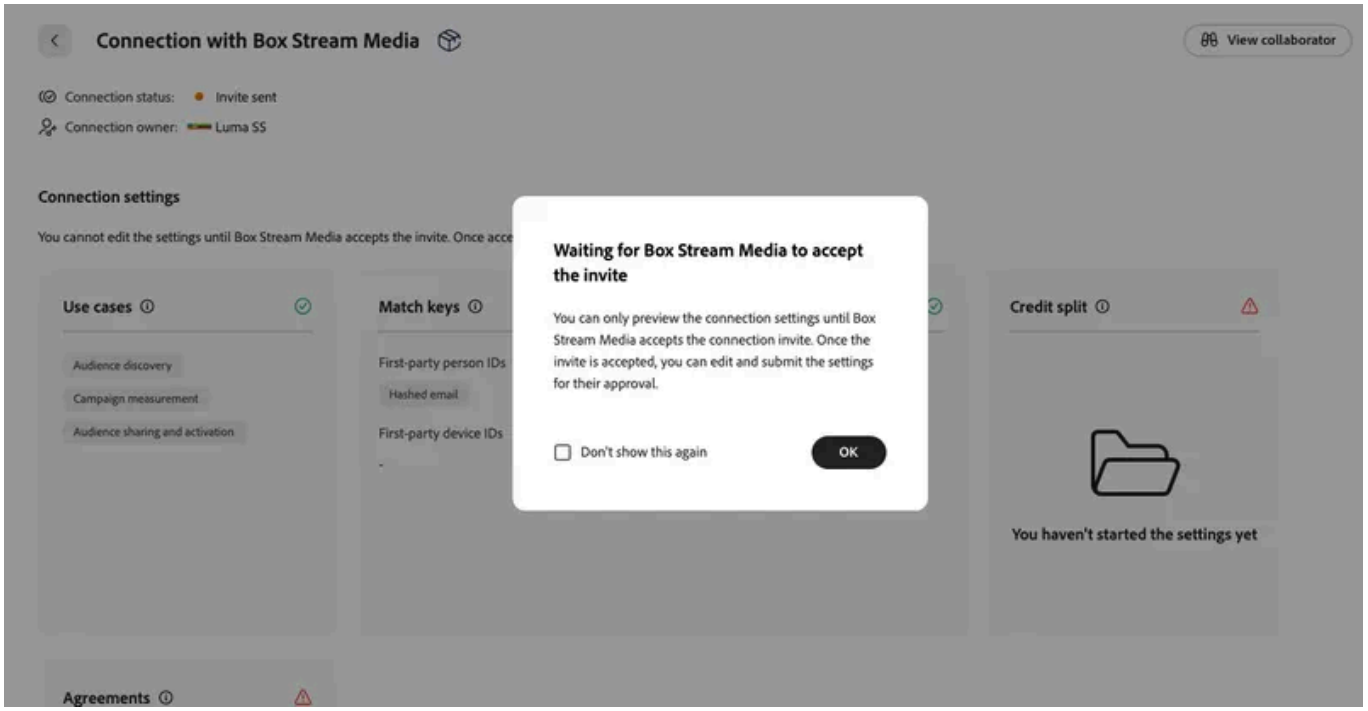


Find and select **BoxStream Media** and click **Connect**

The **Send connection invite** window will appear. Click **Send Invite**

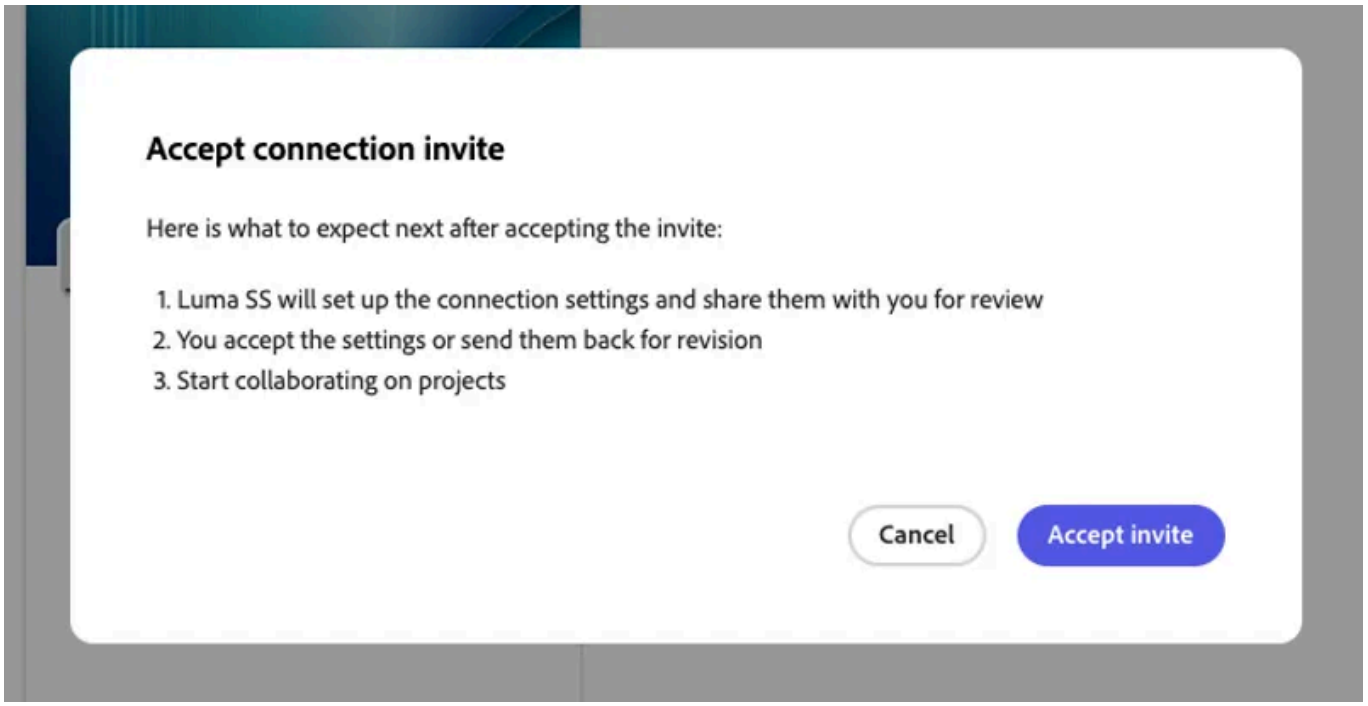


Proceed to preview your connection

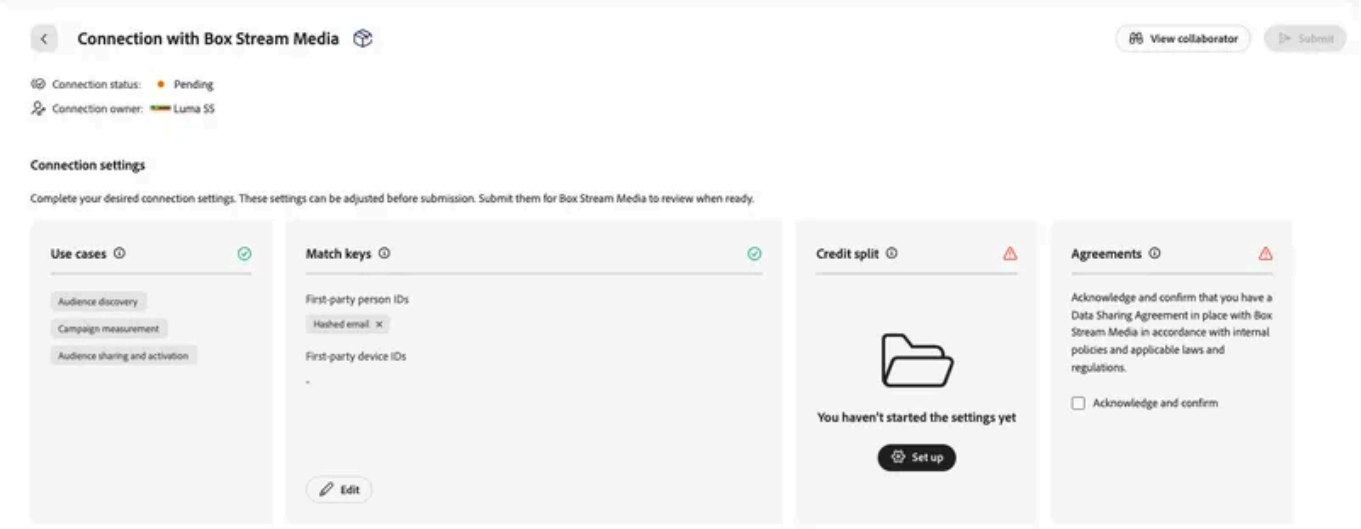


The publisher needs to accept your invitation to connect. Once accepted, you can complete the connection settings and hit **Submit**

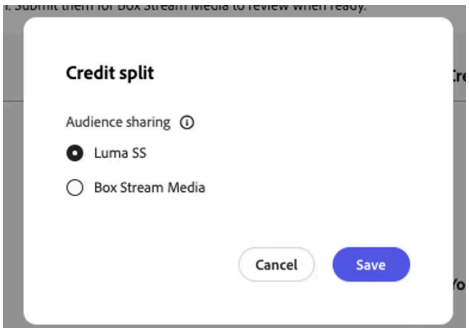
The publisher's workspace will appear as below, prompting the end user to accept the connection invite. The connection is a two-way handshake to allow each party to proceed to agree to additional terms before collaborating.



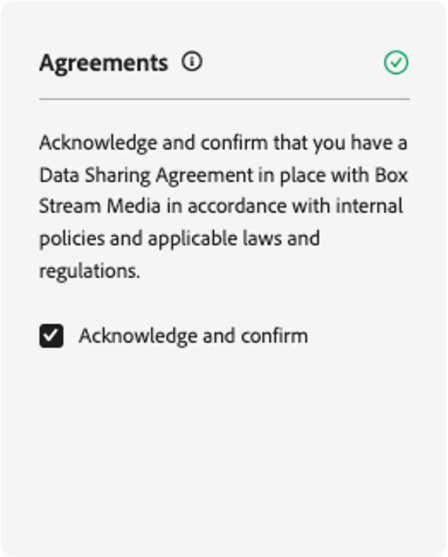
Once the publisher has accepted the connection invite, you must complete your connection settings



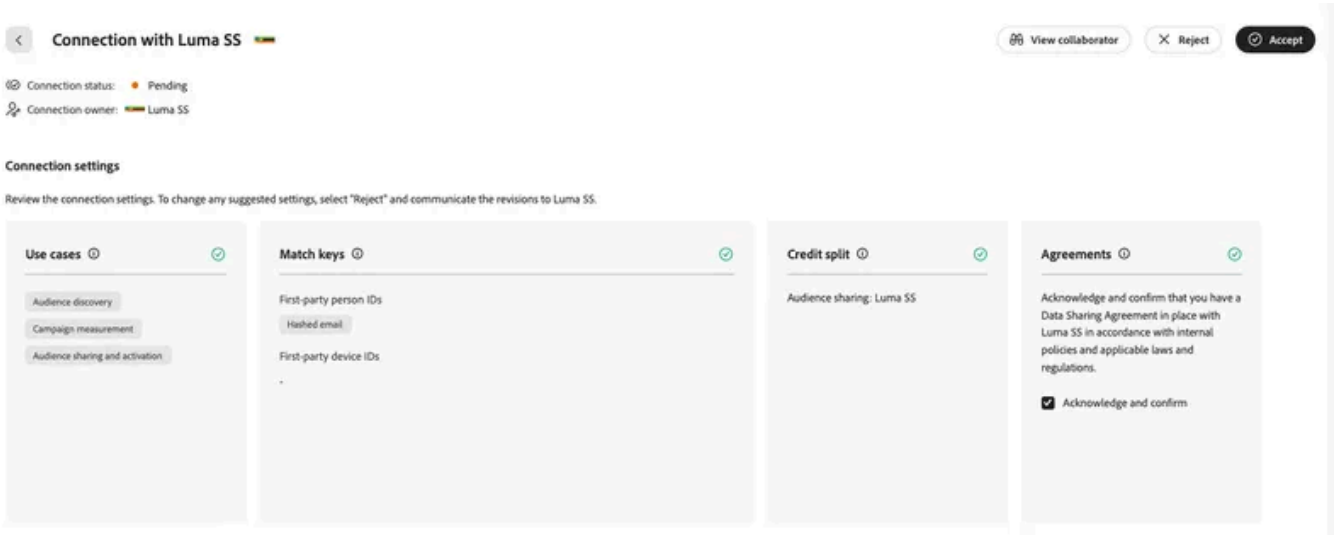
- **Credit split**: This section determines who is paying for the corresponding activities within Real-Time CDP Collaboration. Currently, only the audience sharing use case is configurable. **Save the defaulted credit split to proceed**



- **Acknowledge and confirm**: Verify that a data sharing agreement between the two parties exists.

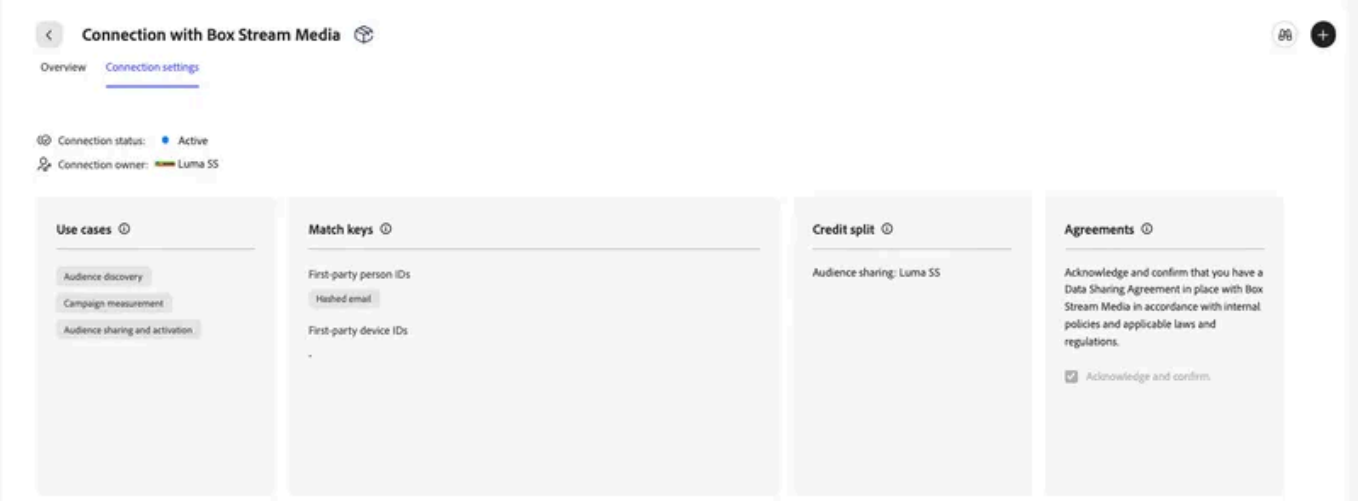


Once submitted, the publisher must acknowledge and confirm on their end.



Once accepted by the publisher, you are ready to create a project and collaborate!

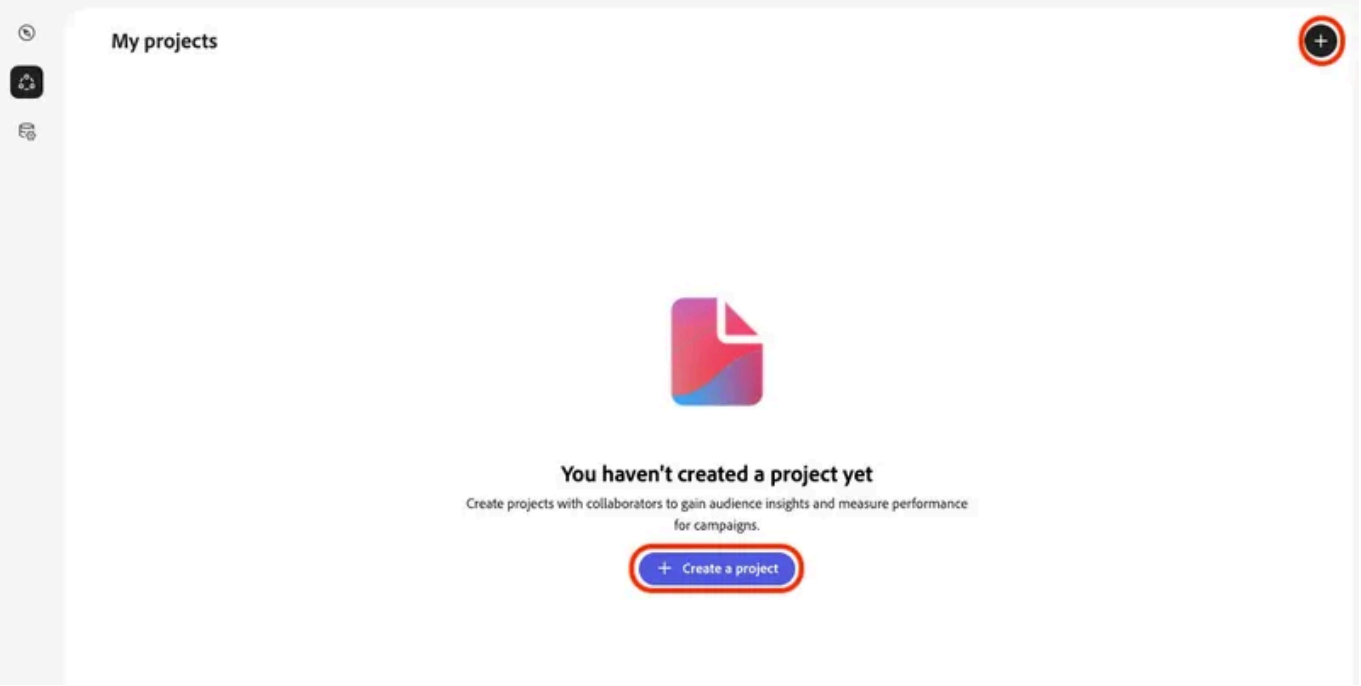
Your publisher connection is now Active.


Connection with Box Stream Media
Overview
Connection settings
Connection status: Active
Connection owner: Luma SS
Use cases
Audience discovery
Campaign measurement
Audience sharing and activation
Match keys
First-party person IDs
Hashed email
First-party device IDs
Credit split
Audience sharing: Luma SS
Agreements
Acknowledge and confirm that you have a Data Sharing Agreement in place with Box Stream Media in accordance with internal policies and applicable laws and regulations.
Acknowledge and confirm

2.4. Create a Project

After you discover and connect with the collaborator, it's time to create a project. Use the project space to run overlap calculations to compare your audiences with your collaborator's audiences and discover recommended audiences that you can use in campaigns.

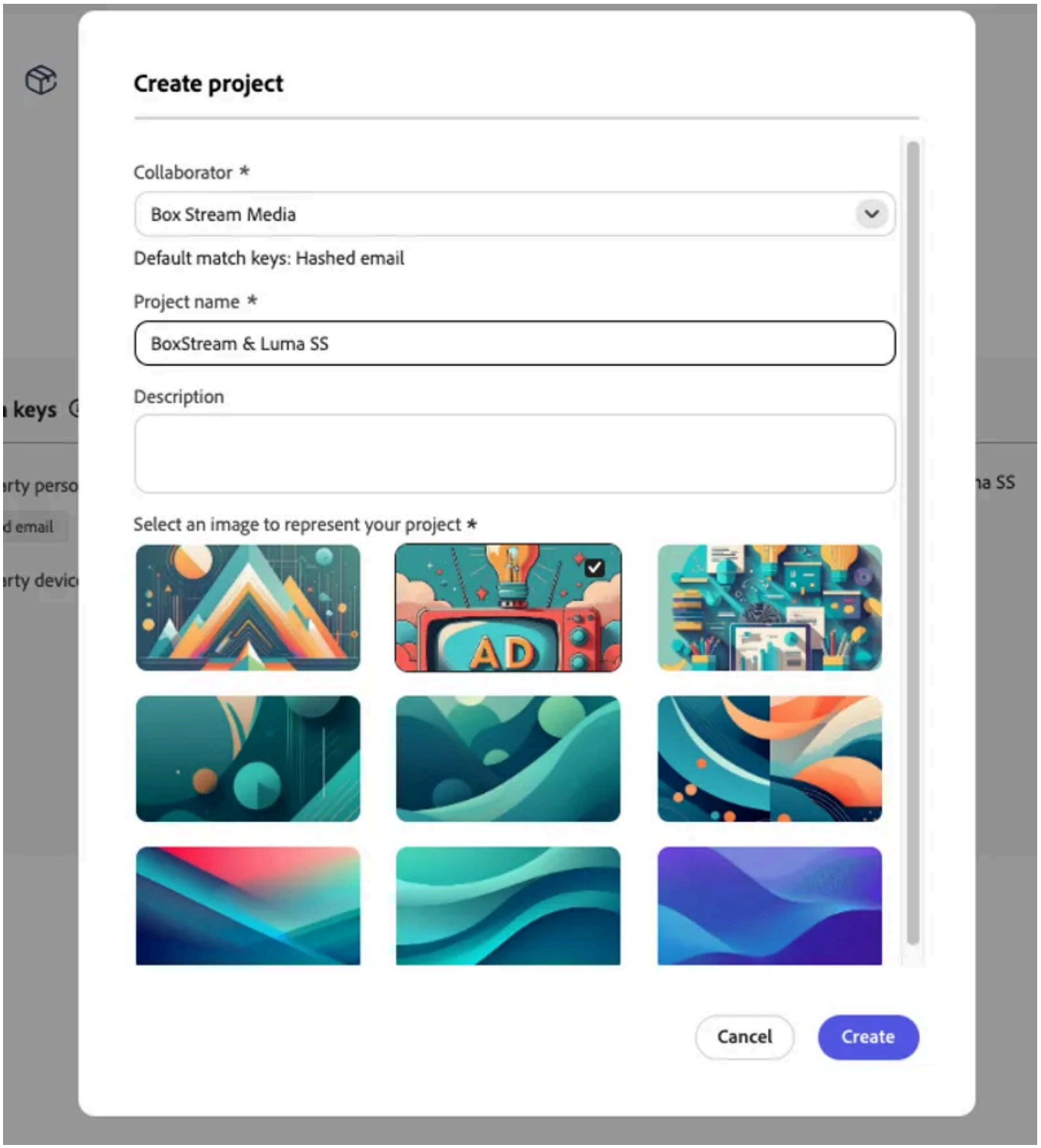
To create a project, select the Plus **+** symbol in the upper right corner. Or, if this is your first project, navigate to **Collaborate > My Projects**, and select **Create a project**.



If you're in your collaborator connection, you can create a project from within the connection view

Provide a **project name** and optional **description** for your project, select an image header to easily distinguish the project, and confirm your selection.

Project name: BoxStream & Luma *+ your initials*



You can now view your new project and its details. Use can use the **Discover** tab to start running overlap calculations between your and your collaborator's audiences.

After **creating a project** within a collaboration space between an advertiser and a publisher, you can now compare your audiences against your collaborator's audiences. You can discover overlaps between audiences and get insights broken down by match keys or identities. This helps advertisers decide which audiences to share with publishers for activation, depending on the desired use case.

2.5. View Overlap Reports & Other Insights

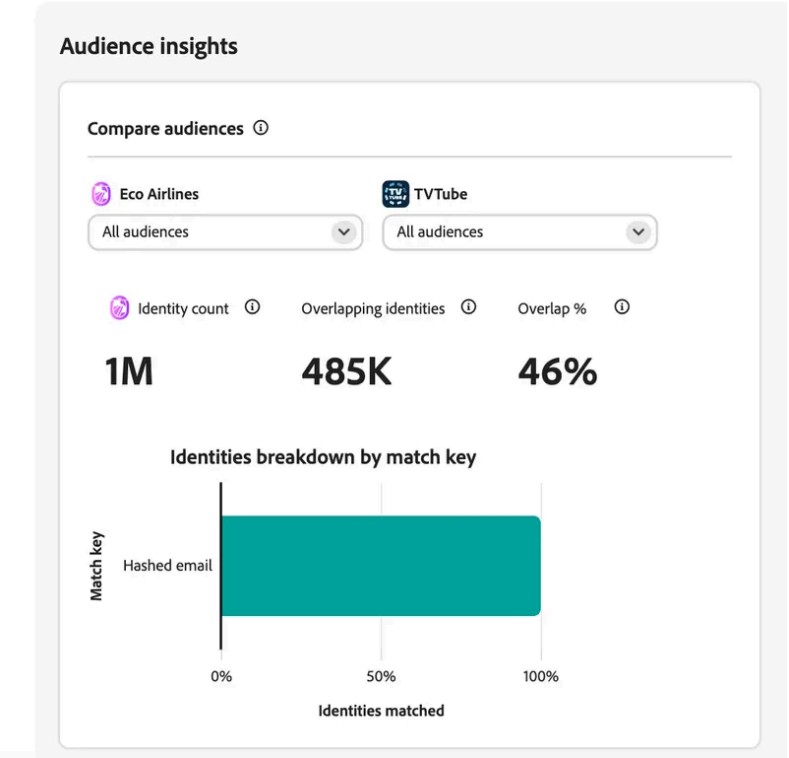
Note: If you are importing audiences from a newly created data connection, your audience insights will be available within ~12hrs. Once populated, additional audience imports will appear in your audience insights reports immediately.

. For the hands-on lab, we will use a pre-existing Collaboration project to examine the audience insights between a publisher and an advertiser.

Compare audiences

Use the compare audiences card to get rich information about the overlap between your and your collaborator's audiences. You can select to compare any of the following audience combinations:

- One of your audiences against one of your collaborator's audiences
- One of your audiences against all of your collaborator's audiences
- All your audiences against one of your collaborator's audiences
- All your audiences against all of your collaborator's audiences



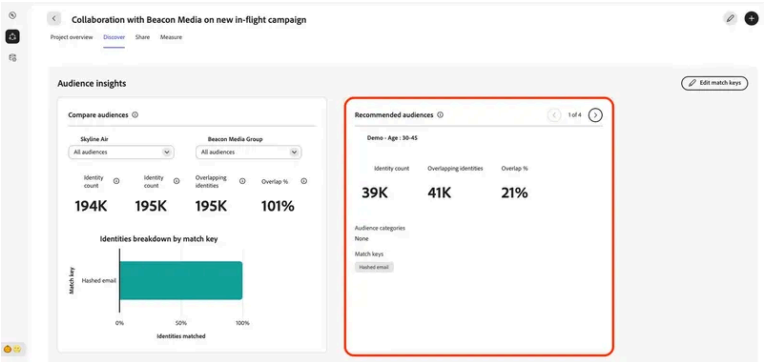
Metric	Description
Identity count (yours)	The number of profiles with a selected identity that are part of your selected audience.
Identity count (your collaborator)	The number of profiles with a selected identity that are part of your collaborator's selected audience.
Overlapping identities	The number of profiles with a selected identity that are present both in your and your collaborator's audience.
Overlap percentage	The percentage of profiles overlapping between your and your collaborator's selected audience.
Identities breakdown by match key	Based on the match keys you and your collaborator agreed on for the project, view the composition of the identities in the overlap calculations by individual match keys.

Recommended audiences

The **Recommended audiences** view in the **Discover** module provides a curated list of the top five recommended audiences based on overlap percentage. This feature helps you quickly identify the audiences with the highest overlap with your current data, enabling you to target your campaigns more effectively.

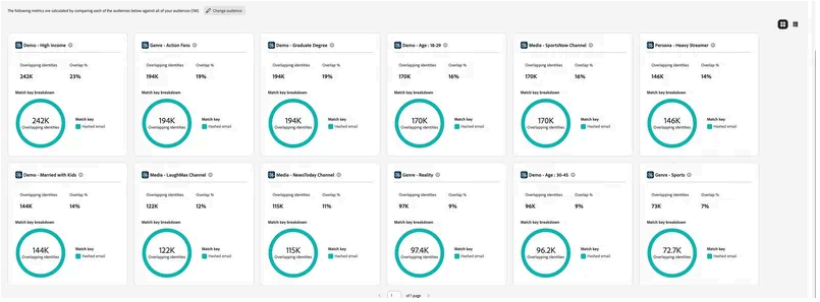
- **Identity count** is the publisher's audience size.
- **Overlapping identities** represents the overlap between the recommended publisher audience and all advertiser audiences.

- **Overlap %** represents the number of overlapping identities divided by the size of *all* advertiser audiences.



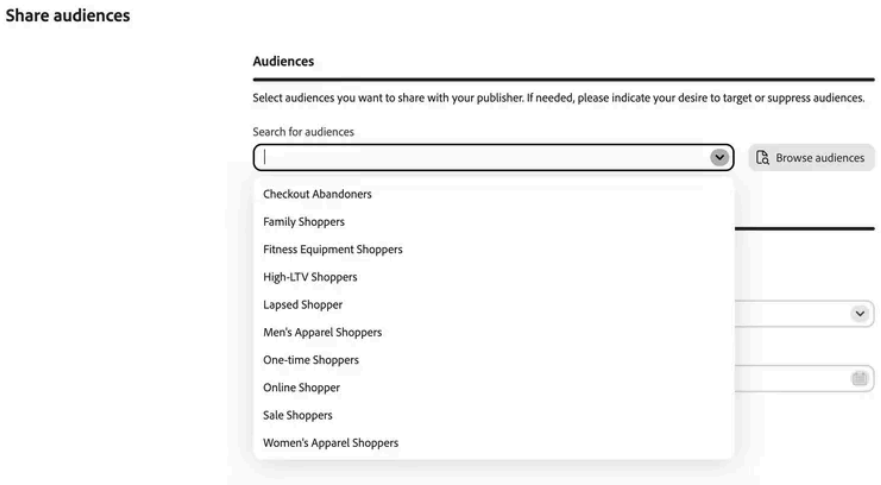
Discover overlaps

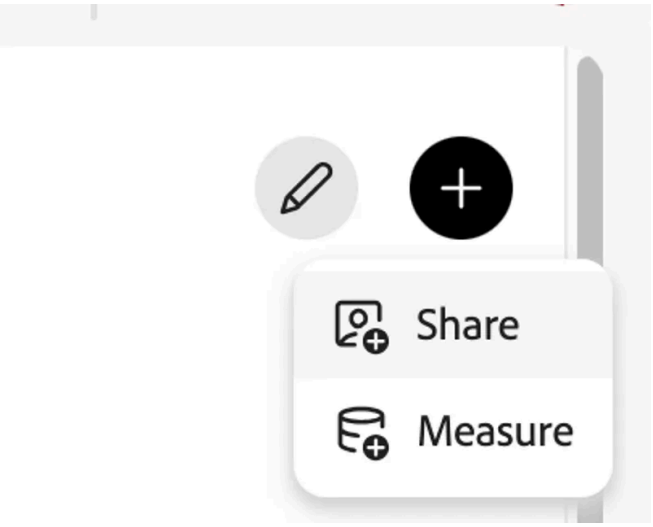
Your collaborator's individual audiences are shown in the **Discover overlaps** card to show their overlap against all of your audiences



2.6. Share Audience

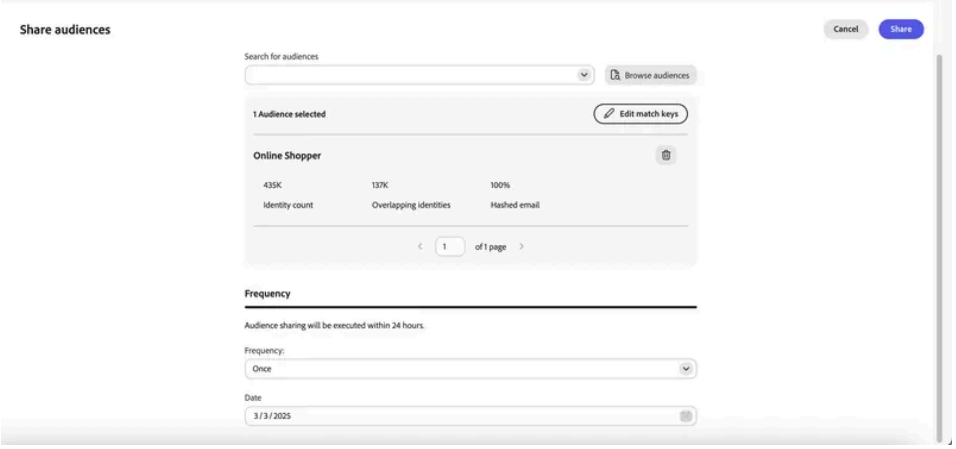
To start sharing audiences, navigate to the **Share** tab in your project workspace. In this tab, you can review and manage shared audiences





Find and select the audience to share: **Online Shopper**

Leave the frequency and date as is



Congrats! You have successfully shared yout audience with your collaborator

After you share an audience for activation, the audience immediately shows up in the publisher's **Activate** view. The audience will be exported to the publisher's indicated location at the interval set during the workflow.

3. Takeaway

Quick Start Guide

https://experienceleague.adobe.com/en/docs/real-time-cdp-collaboration/using/quick-start-guide

Access Control

https://experienceleague.adobe.com/en/docs/real-time-cdp-collaboration/using/permissions/overview

Credit Consumption

https://experienceleague.adobe.com/en/docs/real-time-cdp-collaboration/using/setup/my-activity