

Adobe

CJA B2B Edition HOL

CONTENTS

1. Lab Access	3
2. Customer Scenario	6
3. Technical Architecture	8
4. Connections	13
5. Data Views	16
6. 1. High-Level KPIs & Data Insights Agent	21
7. 2. Analyze Sales Stage Fallout	23
8. 3. Visualize Open Opportunities by Stage	25
9. 4. Calculate Days in Stage	27
10. 5. Build a Segment for Stalled Opportunities	31
11. 6. Analyze Engaged Personas	34
12. 7. Create and Publish an Audience from Content Engagement	36
13. 8. CX Enterprise Coworker	39
14. Lab Resources	41

1. Lab Access

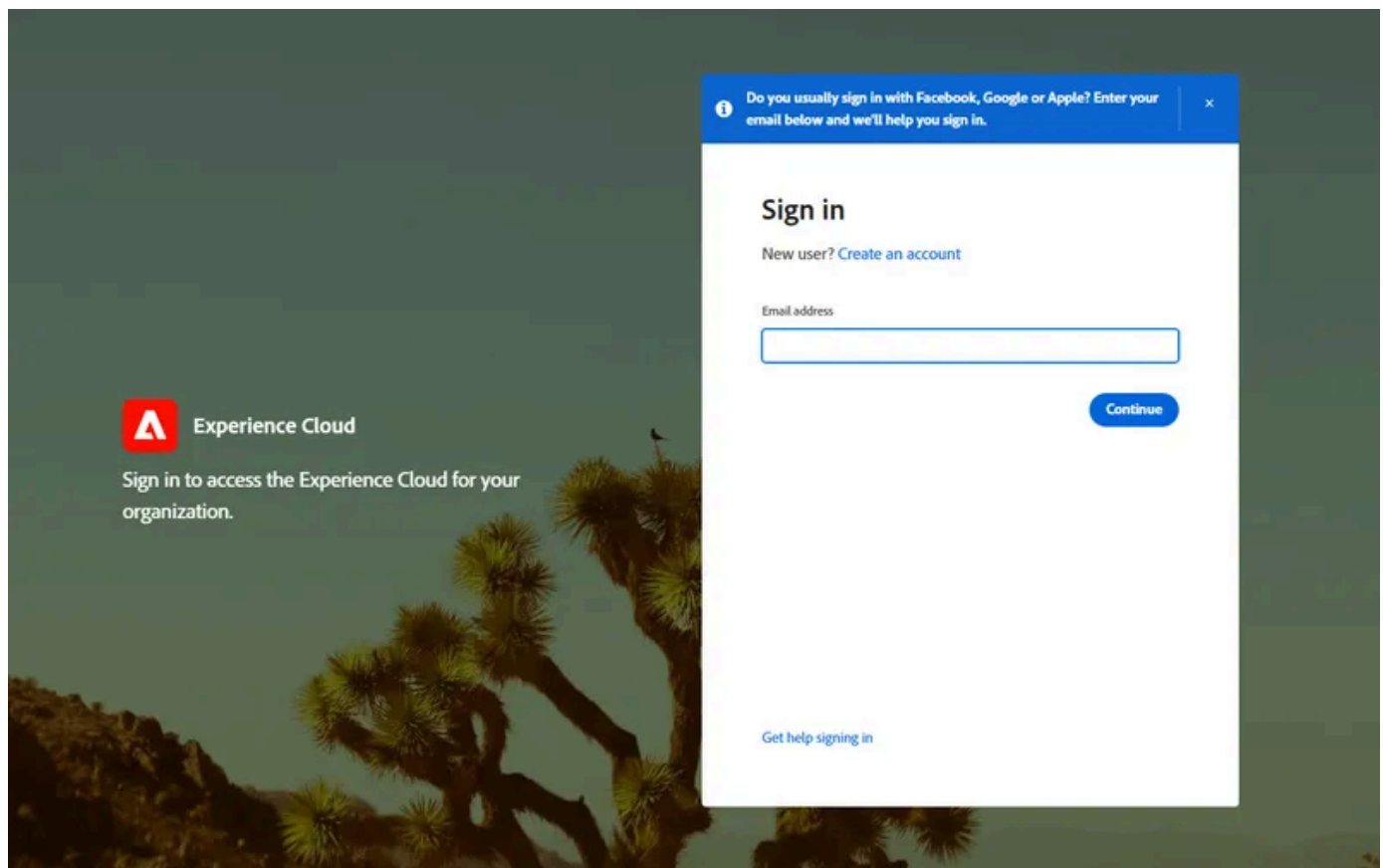
✓ Before proceeding with logging into this lab, please make sure:

- ✓ Use Chrome or Firefox.
- ✓ Sign-out from all Adobe instances that might be open.
- ✓ Do not use your own credentials to access the demo instance for this lab. Instead, you'll use specific credentials provided in this document.

The Hands-on Lab URL: <https://experience.adobe.com>

After navigating to the URL above, you will see a screen like this

If you see anything else, then make sure you sign-out, and try again:



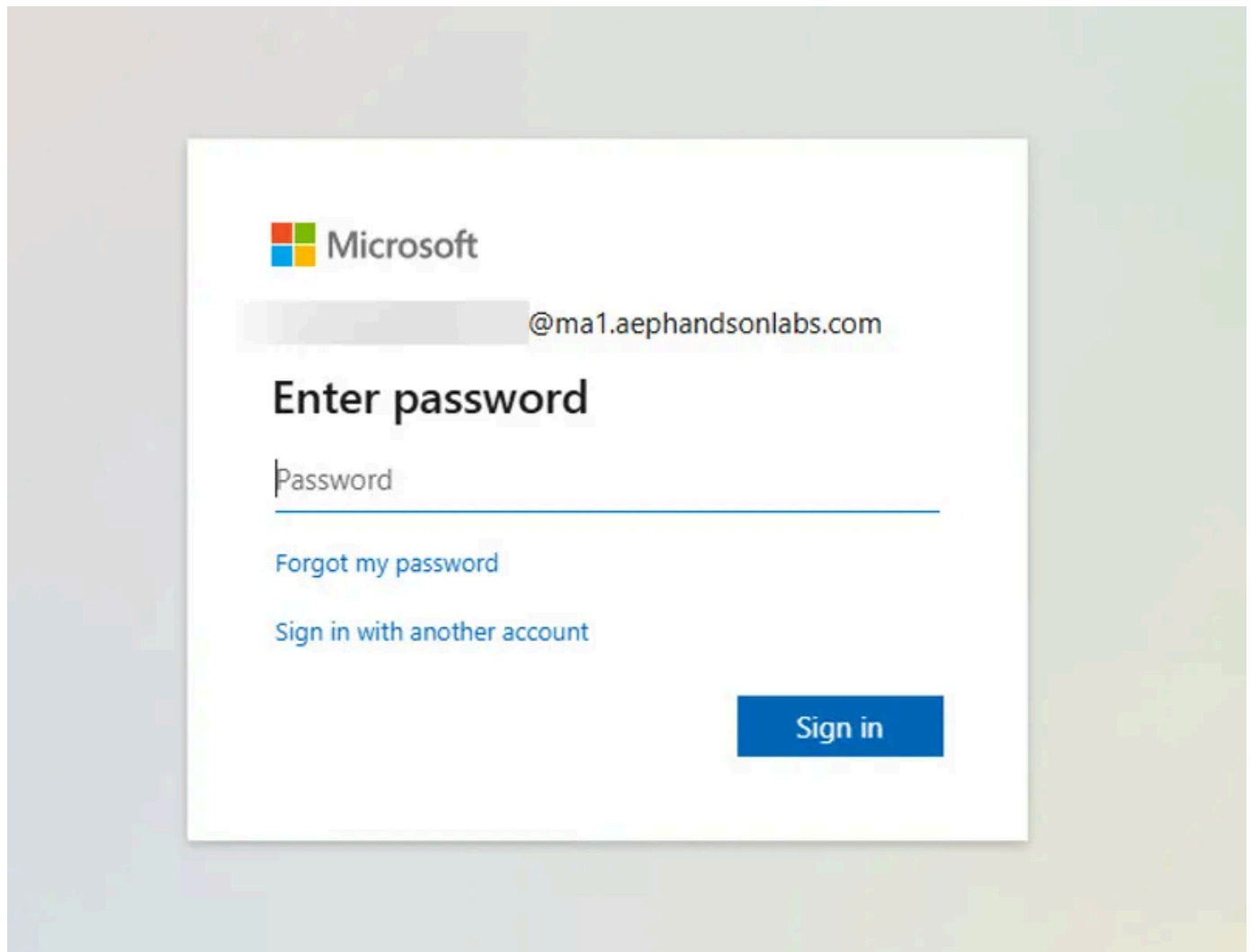
Participant Access List

Locate your name and assigned login email.

☐ Password for all usernames listed below is: **CJAb2bAug26Lab\$**

☐ User	☐ Name	☐ Login Email
☐ 1	Julio Farfan	☐ cjab2blabu01@ma1.aephandsonlabs.com
☐ 2	Jose Ortiz	☐ cjab2blabu02@ma1.aephandsonlabs.com
☐ 3	Frances Mer Lim	☐ cjab2blabu03@ma1.aephandsonlabs.com
☐ 4	Coral Willis	☐ cjab2blabu04@ma1.aephandsonlabs.com
☐ 5	Asad Yasin	☐ cjab2blabu05@ma1.aephandsonlabs.com
☐ 6	Sai Satwika Chandaka	☐ cjab2blabu06@ma1.aephandsonlabs.com
☐ 7	Ksen Golovkina	☐ cjab2blabu07@ma1.aephandsonlabs.com
☐ 8	Kunal Soni	☐ cjab2blabu08@ma1.aephandsonlabs.com
☐ 9	Kristina Villaneuva	☐ cjab2blabu09@ma1.aephandsonlabs.com
☐ 10	Jeri Beckley	☐ cjab2blabu10@ma1.aephandsonlabs.com
☐ 11	Emar Aquino	☐ cjab2blabu11@ma1.aephandsonlabs.com
☐ 12	Charlotte Tallman	☐ cjab2blabu12@ma1.aephandsonlabs.com
☐ 13	Oriol Bailey Watkin	☐ cjab2blabu13@ma1.aephandsonlabs.com
☐ 14		☐ cjab2blabu14@ma1.aephandsonlabs.com
☐ 15		☐ cjab2blabu15@ma1.aephandsonlabs.com
☐ 16		☐ cjab2blabu16@ma1.aephandsonlabs.com
☐ 17		☐ cjab2blabu17@ma1.aephandsonlabs.com
☐ 18		☐ cjab2blabu18@ma1.aephandsonlabs.com

After you enter your assigned username from above (email address) click the 'Continue' button and then you will see the single sign on screen below. We use Microsoft Active Directory so you will see a Microsoft logo and a prompt to enter a password.



Click the 'Sign in' button. If prompted to 'Stay signed in?' you can choose 'Yes' or 'No'.

2. Customer Scenario

Identify Pipeline Friction with Adobe Customer Journey Analytics B2B

Introduction

Identify where deals slow down, which personas drive momentum, and how to turn those insights into action. Learn how Adobe Customer Journey Analytics B2B Edition can help you pinpoint true bottlenecks in your funnel. Analyze how engagement from specific buying groups, titles, and functions influences sales velocity, and discover which types of content resonate most with each audience to strengthen engagement. Learn how to build a high-value audience and publish from Customer Journey Analytics into Adobe Experience Platform.

Goals

After completing this lab, you will walk away with the following knowledge:

- Learn how to use data to identify where opportunities slow down by segments, such as industry, region, or product
- Identify titles that are most engaged by stage and which personas are most associated with deal progression by stage
- Get a repeatable workflow to diagnose friction, quantify persona impact, and operationalize insights for measurable action

Prerequisites

Participants should have an intermediate working knowledge of Adobe Customer Journey Analytics (CJA) or Adobe Analytics, including Connections, Data Views, and Derived Fields.

This lab does not cover data ingestion. Familiarity with how data is brought into Adobe Experience Platform (AEP) and prepared for use in CJA is helpful context, but not required to complete the exercises or understand the value of CJA B2B.

Provided for each participant:

- Chrome browser
- Access to an AEP sandbox configured with CJA B2B and demo data - see appendix for solution design information

Customer Scenario

Our lab's example customer is **TensorRack**, a fast-growing company that provides the hardware and systems that power enterprise data centers and workplaces, including servers, storage, networking, laptops, workstations, and peripherals.

TensorRack's leadership team has a clear priority: **increase opportunity conversion and accelerate pipeline velocity**. Pipeline volume is strong, marketing engagement is up, and the sales team has a healthy pipeline. Yet late-stage deals are stalling, forecast confidence is slipping, and leadership wants to understand why.

In this lab, you will take the role of a **Revenue Operations leader working alongside marketing and sales**. You are responsible for diagnosing pipeline slowdowns and turning insight into measurable action. Your job is to answer four critical questions:

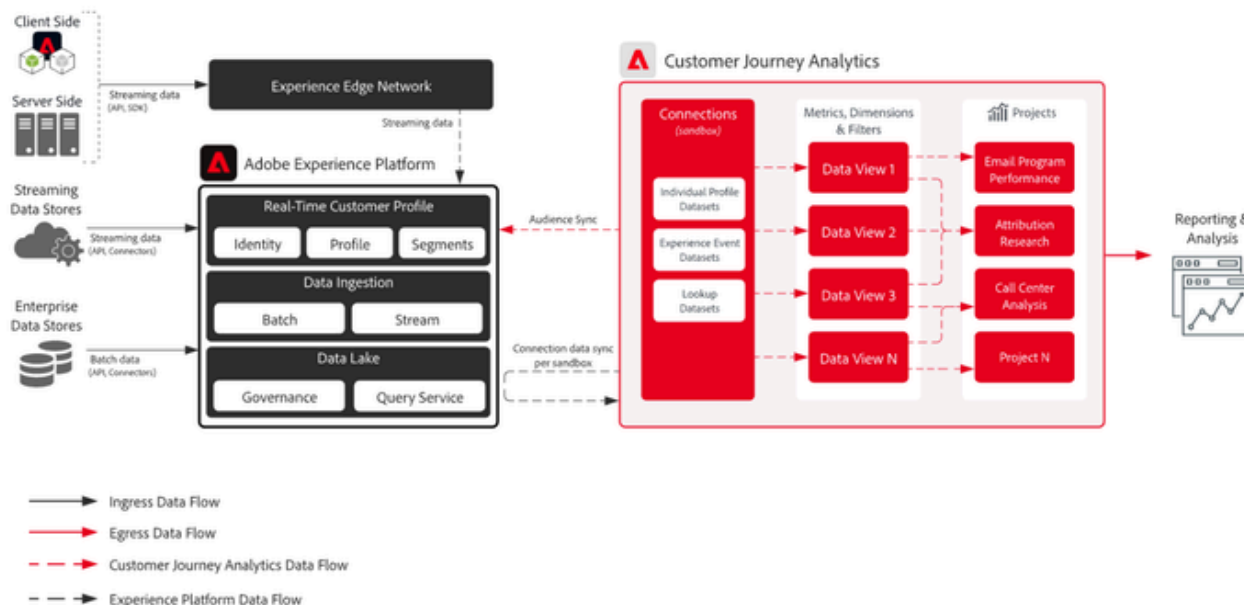
- Where do opportunities slow down by stage and segment (industry, region, product)?
- Which buying group roles, titles, and functions drive momentum at each stage?
- What engagement and content correlate with faster deal progression?
- Which stalled accounts should be prioritized for intervention?

The instructions in this lab guide walk you through the steps you will take as a TensorRack RevOps leader using Adobe Customer Journey Analytics B2B Edition to measure days in stage, stage-to-stage conversion, and stall risk; analyze persona engagement by stage; and build and publish a high-value audience into Adobe Experience Platform for activation.

3. Technical Architecture

Adobe Experience Platform (AEP) is a powerful, flexible, open, and centralized data foundation that collects, standardizes, governs, applies AI insights to, and unifies data to offer thoughtful and relevant digital customer experiences. AEP can ingest data from almost any source needed to power a customer experience. CJA B2B Edition is an application natively built on Experience Platform.

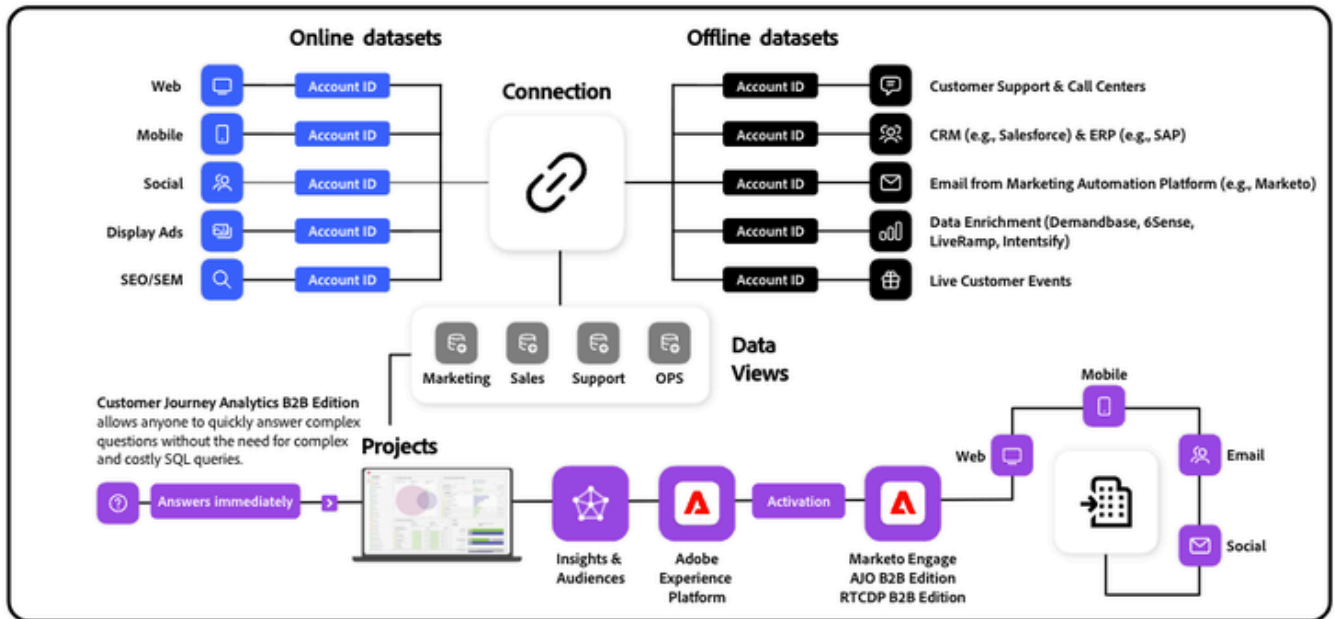
Customer Journey Analytics B2B Edition



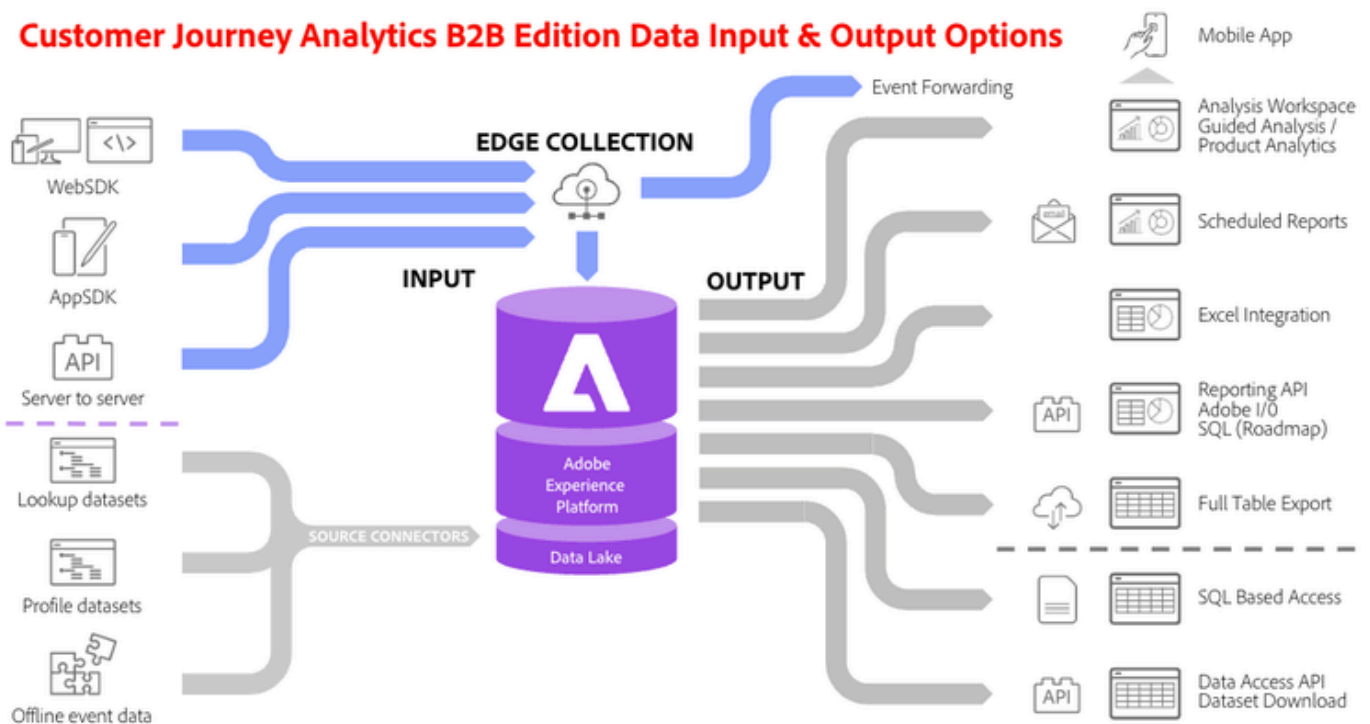
CJA B2B Edition ingests both online and offline datasets from any source (marketing automation and ABM platforms, sales platforms, data enrichment platforms, customer support systems, and operations systems) that contains customer data. With data views, you can then specify dimensions and metrics available in Analysis Workspace and which columns those dimensions and metrics obtain their data from in order to prepare for deep dive analysis and reporting. CJA B2B Edition then generates audiences for publishing and actionable insights from complex B2B data that can then be activated by other B2B account orchestration applications, including Marketo Engage, AJO B2B Edition, and CDP B2B Edition.

Customer Journey Analytics B2B Edition – How it works

Pre-Existing or New Business Questions



Customer Journey Analytics B2B Edition Data Input & Output Options



Connections and identifiers

In Customer Journey Analytics, you pick a common identifier, known as Person ID, to connect your event data with other datasets like profile dataset and lookup datasets. This type of connection is known as a person-based connection which facilitates person-based reporting and analysis.

In Customer Journey Analytics B2B Edition, you can select between a person-based connection or an account-based connection. An account-based connection facilitates account-based reporting and analysis.

- For a person-based connection, you select Person as the primary identifier. You can then configure and set up your connection, data view and workspace projects for person-based reporting.
- For an account-based connection, you select Account as the primary identifier. You can then optionally add additional containers for Global Account, Buying Group and Opportunity. Based on whether you add a Global Account or not, your primary identifier is an account identifier or a global account identifier.

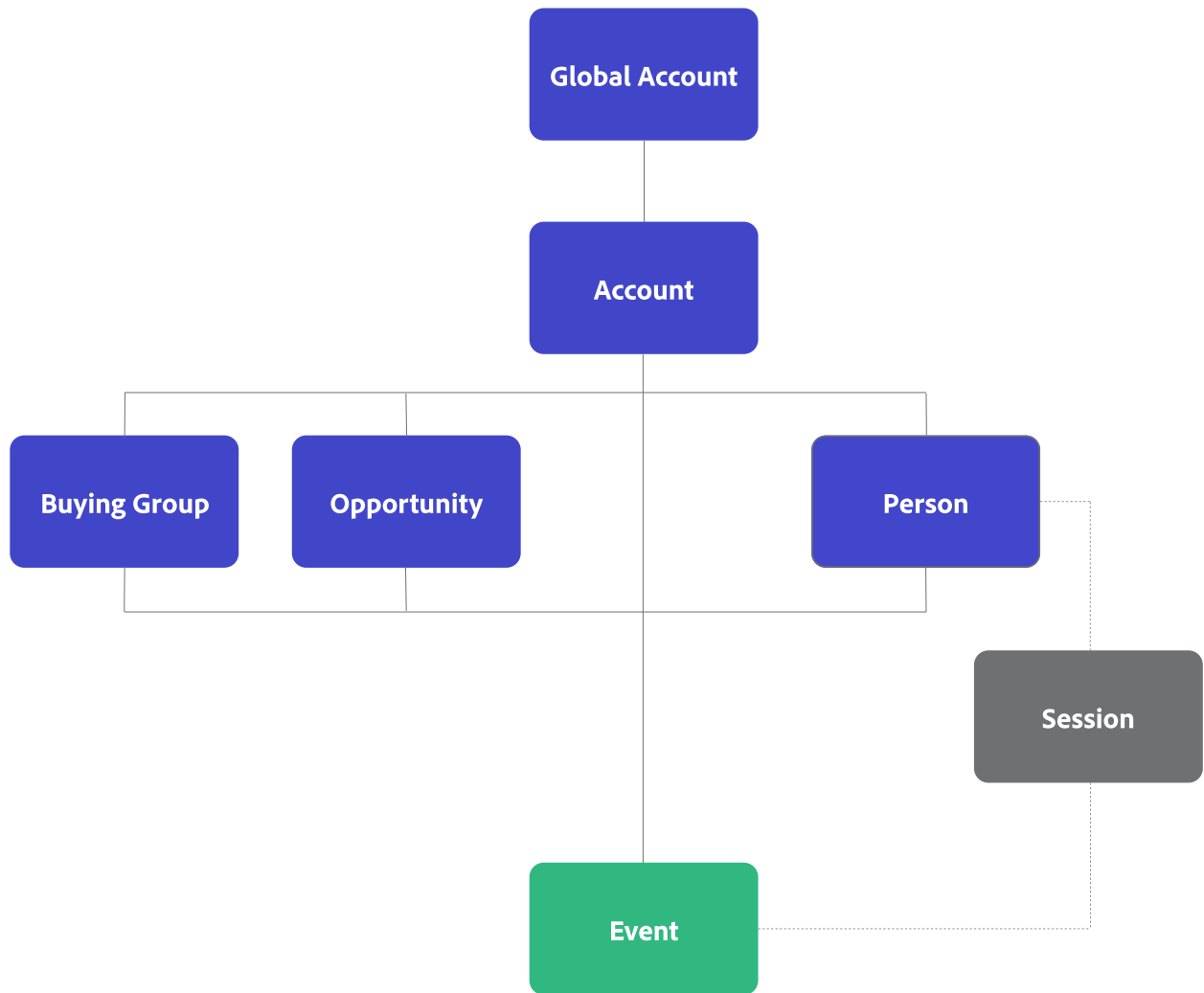
Containers

In Customer Journey Analytics containers are generated as part of the configuration of a connection and data view, and provide data structure and scope. Containers store groups of identifiers to sequence all event timestamps by unique identifiers. That storage facilitates quick and performant execution of functionalities like segmentation, attribution, and visualizations.

B2B containers

In Customer Journey Analytics B2B Edition, an Account container is added to the list of generated containers. And you have the option to configure the generation of additional containers, like Global Account, Buying Group, and Opportunity.

The hierarchy and relationships between the containers is predetermined. Opportunity, Buying Group and Person are all sibling containers of the Account container. In that hierarchy the Session container between the Person container and Event container is generated based on how you define a session in the Session settings in your data view. Additional session containers, for example between the Account container and Event container, are currently not generated and supported. See the table below for a description and basic usage of the B2B containers.



B2B container	Description
Account	Basic use case
Account	A company that is a customer or potential customer of your business. The company could be a subsidiary or division of a larger organization. Account represents the organization that you are selling to and want to track at that organization level.
Global Account (optional)	The top parent company of a group of related companies. A global account has no parent company, but may have subsidiaries or divisions belonging to the global account. When you have the Global Account container configured in your connection, an account that has no parent or subsidiaries should be listed in both the account field and global account field.
Opportunity (optional)	A collection of products and services that are sold together. An opportunity often involved various stages in the sales cycle up until the closure of the sale. You would use data to measure the opportunity progression through the sales funnel. For example, a report that provides details on the top opportunities that moved from stage 3 to stage 4.
Buying group (optional)	A collection of people within an organization that is involved in the decision-making process to purchase a product or service. You would use buying group data to track buying groups through campaign management. For example, build an audience segment of key buying groups. You most likely want a lookup from the buying group to profile data, so you can report on the people in a buying group.
Person	An individual, often identified by a unique e-mail address that has interacted with the company. You would use the profile data to identify people who work for an account. For example: target all the people at an account that have signed-up for a conference.

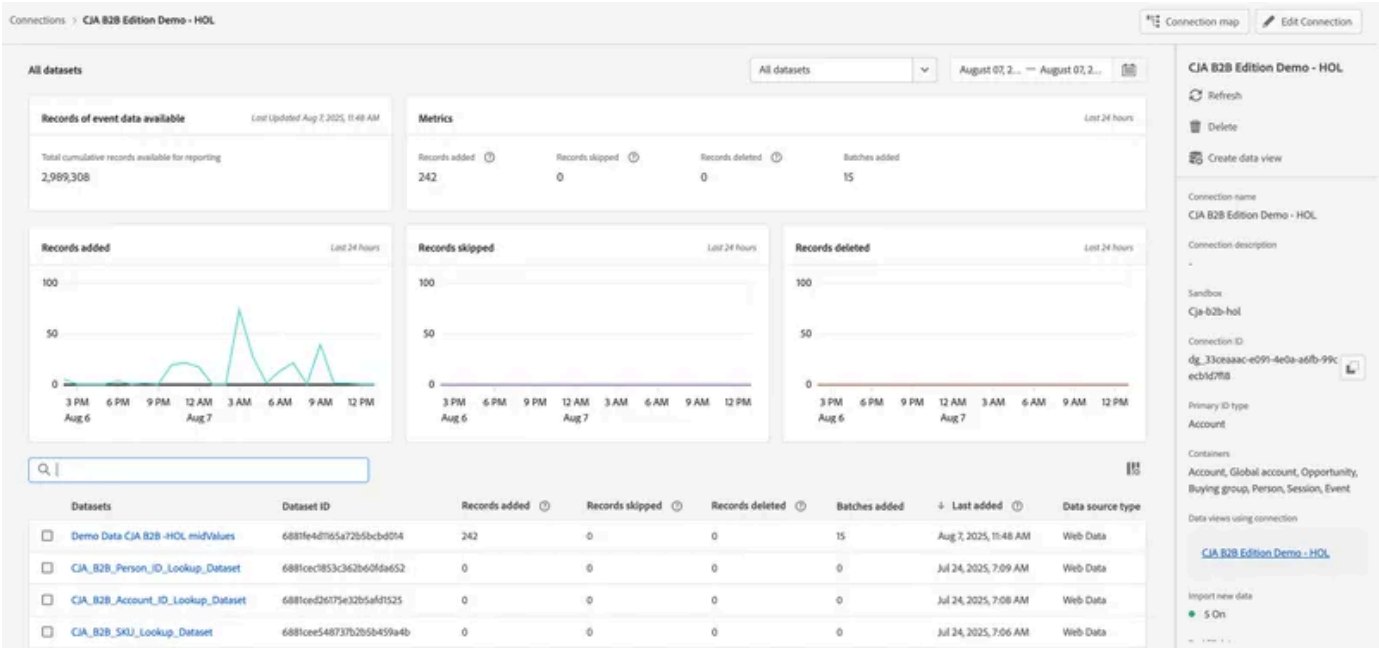
4. Connections

Connection for B2B Data

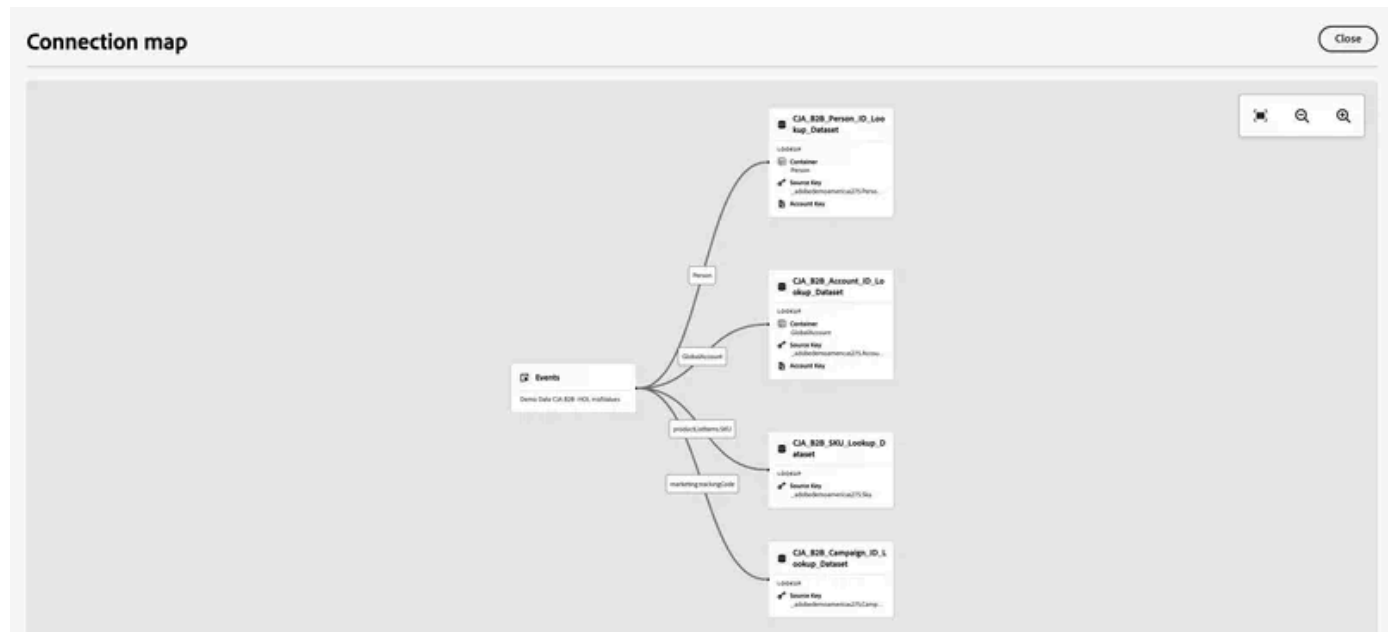
Event, Person, and B2B datasets can be ingested in to a connection using matching keys or containers to join B2B data together. This can contain multiple rows for a single person identifier. Person-based lookups only match the most recent occurrence of that person identifier, preventing a proper person id based lookup of accounts, opportunities, marketing lists or campaigns.

Connections Demo

- The CJA B2B Connection will provide information on the datasets that are connected and how much data is flowing into th connection.



- A connection map will show how all the datasets are joined for what key is used to join the dataset.



- For each dataset you will select values for **Key** and **Matching key**. Below is the an event dataset that will have multiple keys and matching keys that can be configured for joining account, opportunity, buying groups, and/or person datasets.
 - The **Key** is based on the Person ID data type.
 - The **Matching Key** is defined as the primary identity field for the event dataset.

Edit dataset: Demo Data CJA B2B -HOL midValues

Cancel Apply

Remove

Batch status: Staging
Dataset ID: 6881fe4d165a72b5bcbdb014
Description: Analytics Data Connector for report suite Demo Data CJA B...

Number of records: 5,803,848
Schema: [sgeobxosnwcscjab2b Schema](#)
Dataset: [Demo Data CJA B2B -HOL midValues](#)

Preview: Demo Data CJA B2B -HOL midValues (First 100 rows)

timestamp	_id	_experie...	_experie...	_experie...	_experie...	_experie...	_experie...	_experie...	_experie...
173505...	344125...	175336...	465252...	Buena ...	465252...	833554...	Internal	CRM	Bottom...
173508...	344150...	175339...	-	-	-	-	Display...	Display...	Top of ...
173508...	344150...	175339...	-	-	-	-	Social ...	Social ...	Top of ...
173508...	344150...	175339...	-	-	-	-	Display...	Display...	Top of ...
173505...	344133...	175337...	-	-	-	-	Web	Web D...	Top of ...
173505...	344133...	175337...	-	-	-	-	Web	Web D...	Top of ...

Account ID * Subsidiary Account ID ☒

Global Account ID * Account ID ☒

Opportunity ID Opportunity ID ☒

Buying Group ID Buying Group ID ☒

Person ID User ID ☒

Timestamp * Timestamp ☒

Data source type * Web Data ☒

Import new data ☒ Import all new data

Import starts at save: 7/24/25, 5:11:40 AM Central Daylight Time

Dataset backfill ☐ Backfill all existing data

- For example you will see in the CJA B2B Account ID Lookup Dataset is matching to Account ID that is the same in the previous event dataset shown that will use Account ID in the event dataset.

Edit dataset: CJA_B2B_Account_ID_Lookup_Dataset

LOOKUP DATASET

CJA_B2B_Account_ID_Lookup_Dataset

Key *

Account_ID

Matching key type

Match by field

Match by container

Matching key *

Global Account

Global Account field *

Account_ID

Data source type *

Web Data

Import new data

Import all new data

Import starts at save: 7/24/25, 5:11:40 AM Central Daylight Time

Dataset backfill

Backfill all existing data

Backfill starts at save: No backfill

Batch status

Success

Dataset ID

6881ced26175e32b5afd1525

Description

-

Number of records

0

Schema

CJA_B2B_Account_ID_Lookup

Dataset

CJA_B2B_Account_ID_Lookup_Dataset

Preview: CJA_B2B_Account_ID_Lookup_Dataset

First 100 rows

Q

100 of 100

_adobe...	_adobe...	_adobe...	_adobe...	_adobe...	_adobe...	_adobe...	_adobe...	_adobe...	_adobe...
196266...	2051212...	High	9	Miami	United ...	954-33...	33169	Medium	6
430415...	6557444	High	7	SONKA...	Finland	046 65...	74300	Low	3
324644...	1899152...	Medium	5	Ellwoo...	United ...	724-75...	16117	Medium	4
720290...	1394815...	Medium	5	Winnwil	Switzer...	031 412...	3184	Low	3
80660...	450046	Low	3	Belo H...	Brazil	(31) 22...	30855...	Low	1
300362...	95218113	High	7	West N...	United ...	317-856...	46183	Low	3

- Another example you will see in the CJA B2B SKU Lookup Dataset is matching to SKU that is the same in the event dataset.

Edit dataset: CJA_B2B_SKU_Lookup_Dataset

LOOKUP DATASET

CJA_B2B_SKU_Lookup_Dataset

Key *

SKU

Matching key type

Match by field

Match by container

Matching key *

SKU (Event datasets)

Global Account field *

Select global account field

Data source type *

Web Data

Import new data

Import all new data

Import starts at save: 7/24/25, 5:11:40 AM Central Daylight Time

Dataset backfill

Backfill all existing data

Backfill starts at save: No backfill

Batch status

Success

Dataset ID

6881cee548737b2b5b459a4b

Description

-

Number of records

0

Schema

CJA_B2B_SKU_Lookup

Dataset

CJA_B2B_SKU_Lookup_Dataset

Preview: CJA_B2B_SKU_Lookup_Dataset

First 100 rows

Q

100 of 100

_adobe...	_adobe...	_adobe...	_adobe...	_adobe...	_adobe...	_adobe...	_adobe...	_adobe...	_adobe...
Bodea Compl...	skuid:100078	Compliance ...	BodeaWorks ...	Business Ope...	H Series 6 Xto...	Servers			
Bodea Financ...	skuid:100056	Financial Advl...	BodeaDocs S...	Document M...	ScaleConnect ...	Servers			
Bodea UX De...	skuid:100082	Product/Tech ...	BodeaMarket ...	Marketing	Impetus 2800...	Routers			
Bodea Traini...	skuid:100231	Training & En...	BodeaEnable...	Sales Enable...	Momentum I...	Routers			
RiskRadar Ass...	skuid:100196	Compliance ...	BodeaRelates...	Relationship...	Momentum I...	Routers			
Regulatory Re...	skuid:100285	Compliance ...	BodeaInvento...	Inventory Ma...	ScaleConnect ...	Servers			

15 / 44

Created at Aug 20, 2026

5. Data Views

A data view is a virtualized container of the data in the Connection that allows you to decide what metrics and dimensions should be included. You can also create Derived Fields to modify data as needed without making any change to the raw data. You can also configure dimensions and metrics as needed and for reporting purposes.

Data Views Demo

- Review the capabilities in the Metric Settings:
 - Formatting Data
 - Behavior Definition
 - Include or Exclude Values
 - Metric Deduplication
 - Attribution

There are unsaved changes

...

X

X

X

X

X

X

X

X

X

X

Schema field name

Negotiations Started

Dataset type

Event

Dataset

Demo Data CJA B2B -HOL
midValues

Schema data type

Double

Component ID

_experience.analytics.event
1to100.event29.value

Schema path

_experience.analytics.event1to100
.event29.value

Data Usage Labels

--

☐ Hide component in reporting

> FORMAT ?

> BEHAVIOR ?

> INCLUDE/EXCLUDE VALUES ?



- Review the capabilities of Dimension Settings:
 - Substring Data
 - Behavior Definition
 - No Value Options
 - Include or Exclude Values
 - Persistence

...

X

X

X

X

X

X

X

X

Schema field name

Marketing Channel

Dataset type

Event

Dataset

Demo Data CJA B2B -HOL
midValues

Schema data type

String

Component ID

_experience.analytics.custo
mDimensions.eVars.eVar8

Schema path

_experience.analytics.customDim
ensions.eVars.eVar8

Data Usage Labels

--

☐ Hide component in reporting

> SUBSTRING ?

> BEHAVIOR ?

> NO VALUE OPTIONS ?

×

reserved.

> INCLUDE EXCLUDE VALUES ?

> PERSISTENCE ?

6. 1. High-Level KPIs & Data Insights Agent

Our first CJA B2B panel is prebuilt and designed to set the stage for the hands-on exercises that follow.

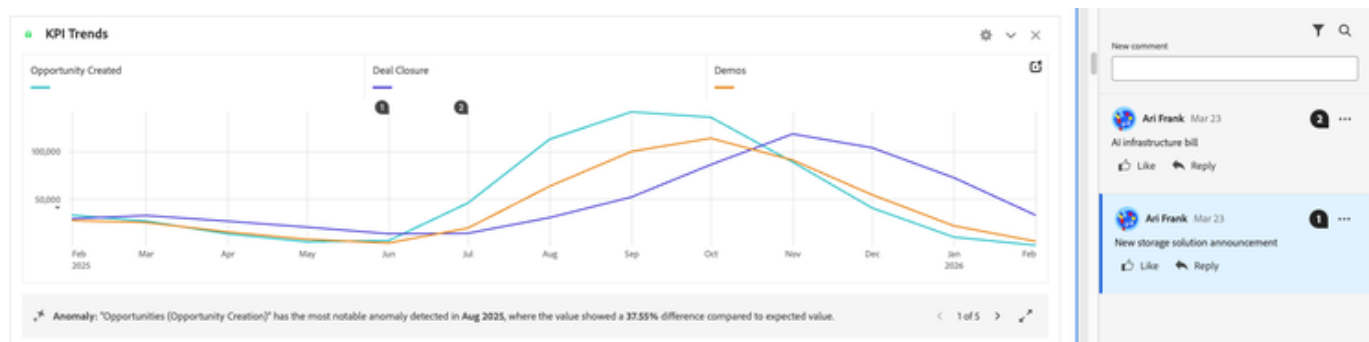
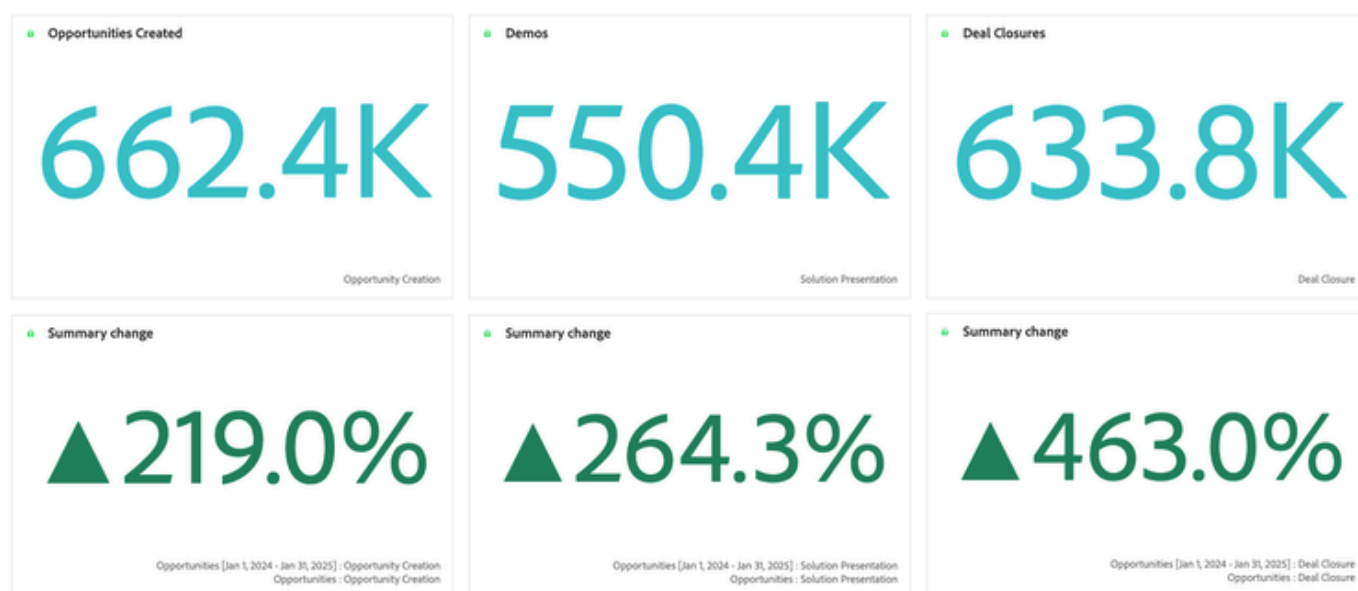
It introduces the **TensorRack** scenario, outlines the lab flow, and highlights a few foundational KPI views. These visualizations are intentionally straightforward and use patterns similar to traditional CJA, so we will not spend lab time building them from scratch.

At the bottom of the panel, you will also find examples of natural language queries powered by the **Data Insights Agent**. This demonstrates how users can ask clarifying product questions, explore the data, or generate visualizations using plain language.

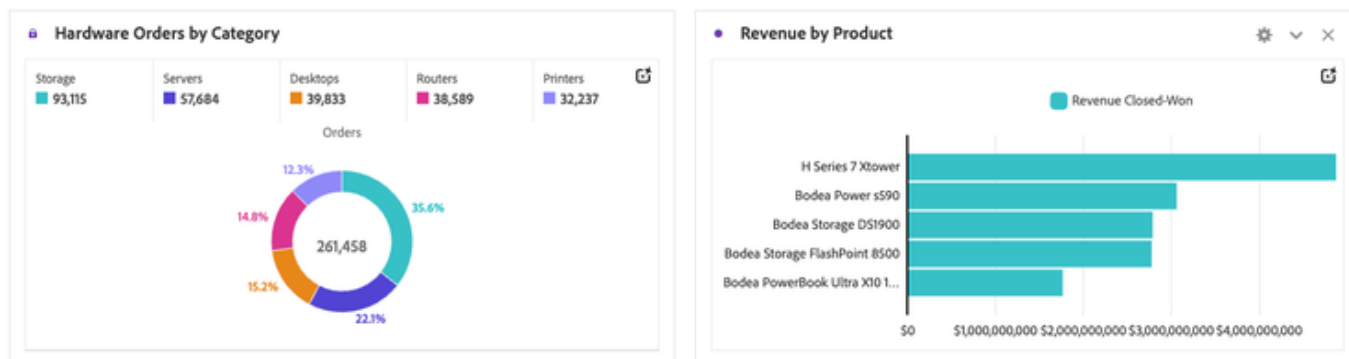
1.1 Objectives

This panel provides a quick view of overall B2B performance, similar to the type of dashboard an analyst or RevOps leader might review at the start of each day. By bringing TensorRack's B2B data into Adobe Experience Platform, we can use Customer Journey Analytics B2B Edition to surface performance across channels, products, and outcomes in one place.

We begin by reviewing the total volume of **B2B Opportunities** and their **year-over-year change**.



We also show how **comments** can be added directly to a trend line to provide context, flag anomalies, or ask a teammate a question about a specific data point.



Next, we include a view of **Orders and Revenue by product**. This helps HelioCore understand which product categories are performing well and which may be underperforming relative to expectations.

1.2 Checkpoint / Reflection

This first panel shows what a high-level **CJA B2B KPI dashboard** can look like. The reporting experience is intentionally familiar to CJA users, making it easy to analyze B2B data using the same core interface and concepts.

It also introduces the Data Insights Agent as a practical companion when you need help understanding a feature, exploring a question, or generating a visualization. For best results, make your prompts as clear and specific as possible.

7. 2. Analyze Sales Stage Fallout

Use this template to create your major lessons. Each page should list key takeaways and objectives.

- Clearly label and number each lesson and exercise for easy reference

2.1 Objectives

In this exercise, you will learn how to analyze how opportunities progress through the sales funnel and identify where the largest drop-offs occur. By the end, you will be able to pinpoint the stages where TensorRack is losing momentum and focus attention on the most critical areas for improvement.

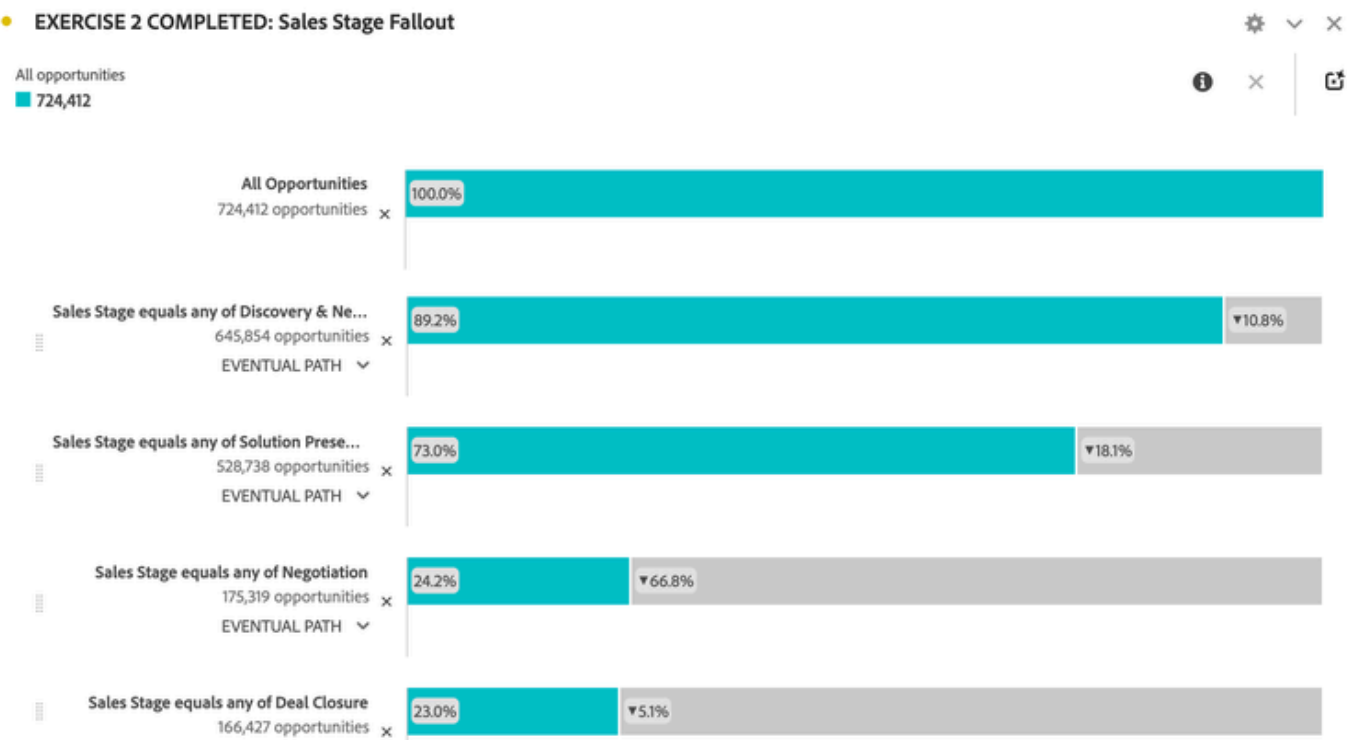
2.2 Exercise

TensorRack’s leadership knows pipeline volume is strong, but deals are not progressing as expected. As the RevOps lead, your first task is to understand **where opportunities are dropping off across the sales funnel**.

In this exercise, you will build a fallout visualization to analyze how opportunities move from stage to stage and identify where the largest drop-offs occur.

Steps:

- Add a **Fallout visualization** to your workspace.
- Set the **container** to **Opportunity**.
- Add the following stages in order using the **Sales Stage** dimension:
 - Discovery & Needs Assessment
 - Solution Presentation
 - Negotiation



Deal Closure

- Do not include **Opportunity Creation** in this fallout. Opportunities are not assigned until Stage 2, so Stage 1 cannot be used with the Opportunity container.
- Each step represents opportunities progressing through the sales process.
- Focus on identifying where the largest drop-off occurs between stages.

2.3 Checkpoint / Reflection

This type of exercise demonstrates how CJA quickly surfaces actionable insights using visualizations. A simple fallout visualization **demonstrated that deals are stalled/lost during the Solution Presentation stage.**

8. 3. Visualize Open Opportunities by Stage

Understand where pipeline is currently concentrated across the sales funnel.

3.1 Objectives

In this exercise, you will learn how to visualize the current distribution of open opportunities across sales stages. By the end, you will be able to identify where pipeline is accumulating and understand how attribution and container settings impact your analysis.

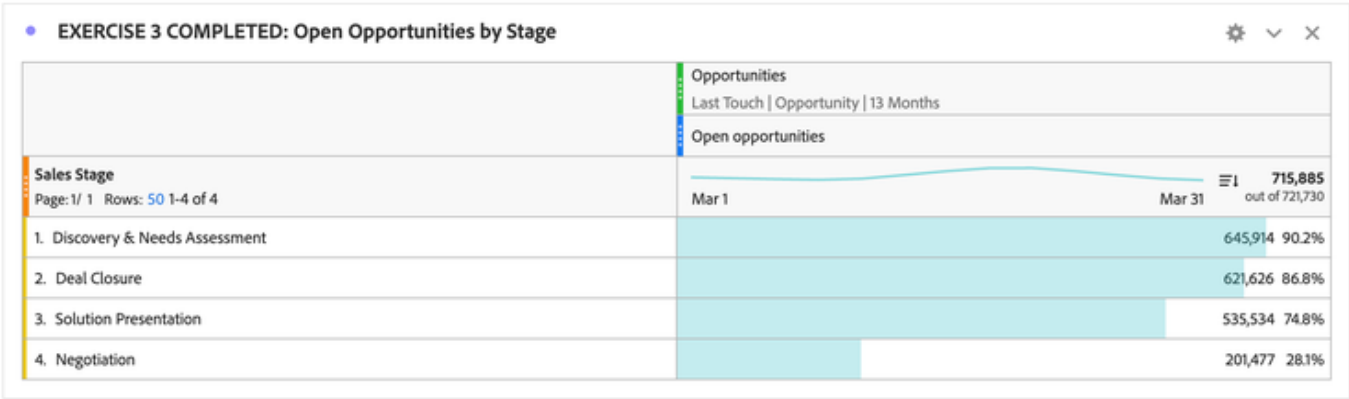
3.2 Exercise

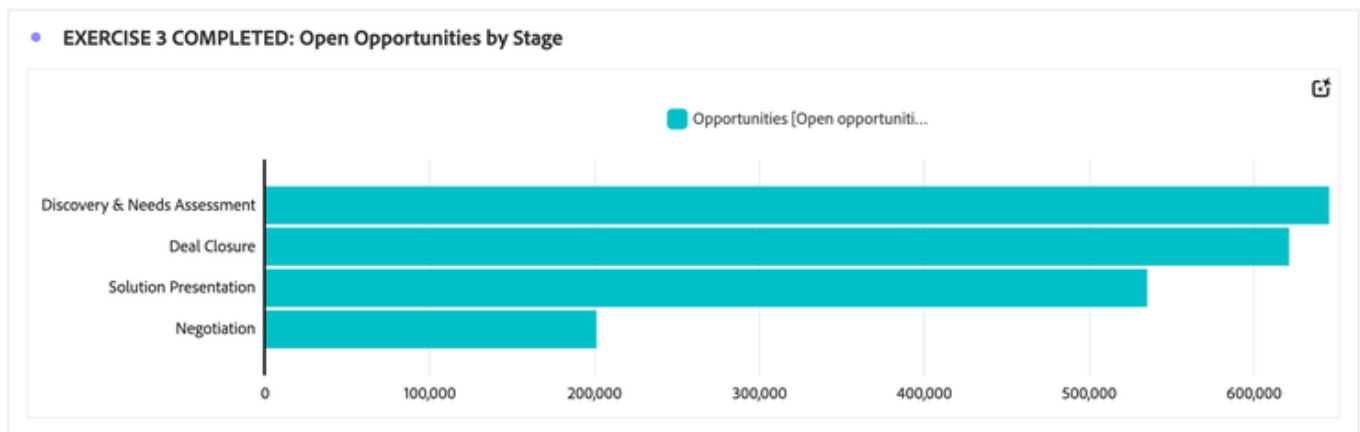
TensorRack's leadership now wants a clearer view of **where open opportunities currently sit in the pipeline**. After identifying where opportunities drop off, the next step is to understand **which stages are carrying the most pipeline right now**.

In this exercise, you will build a visualization to show open opportunities by sales stage and apply two important configurations: the **Opportunity container** and the **Last Touch attribution model**.

Steps:

- 1. Add a **Freeform Table** to your workspace.
- 2. Drag in the **Sales Stage Name** dimension as the first column.
- 3. Drag in the **Opportunities** metric.
- 4. Open the metric settings and set the **container** to **Opportunity**.
- 5. Change the **attribution model** to **Last Touch**.
- 6. Add a **bar visualization** above the table to make stage distribution easier to compare.





- The **Opportunity container** ensures the metric is calculated at the opportunity level rather than at the event or person level.
- The **Last Touch attribution model** assigns each opportunity to its most recent stage.
- This provides a current-state view of pipeline distribution, rather than tracking historical progression across all stages.

3.3 Checkpoint / Reflection

This view provides a snapshot of where pipeline is currently concentrated across the funnel. Rather than looking at how opportunities progressed over time, you are seeing **where they sit right now**.

This is especially valuable for RevOps and sales leadership, as it highlights where attention may be needed. Stages with a high concentration of open opportunities may indicate healthy pipeline, or they may signal potential bottlenecks that require further investigation.

9. 4. Calculate Days in Stage

Quantify how long opportunities spend in each stage of the sales cycle.

4.1 Objectives

In this exercise, you will learn how to measure the amount of time opportunities spend in a specific sales stage. By the end, you will understand how stage duration is calculated using Derived Fields and how to summarize that data using calculated metrics.

4.2 Exercise

TensorRack has identified where opportunities slow down and where pipeline is concentrated. The next step is to quantify **how long opportunities spend in each stage**.

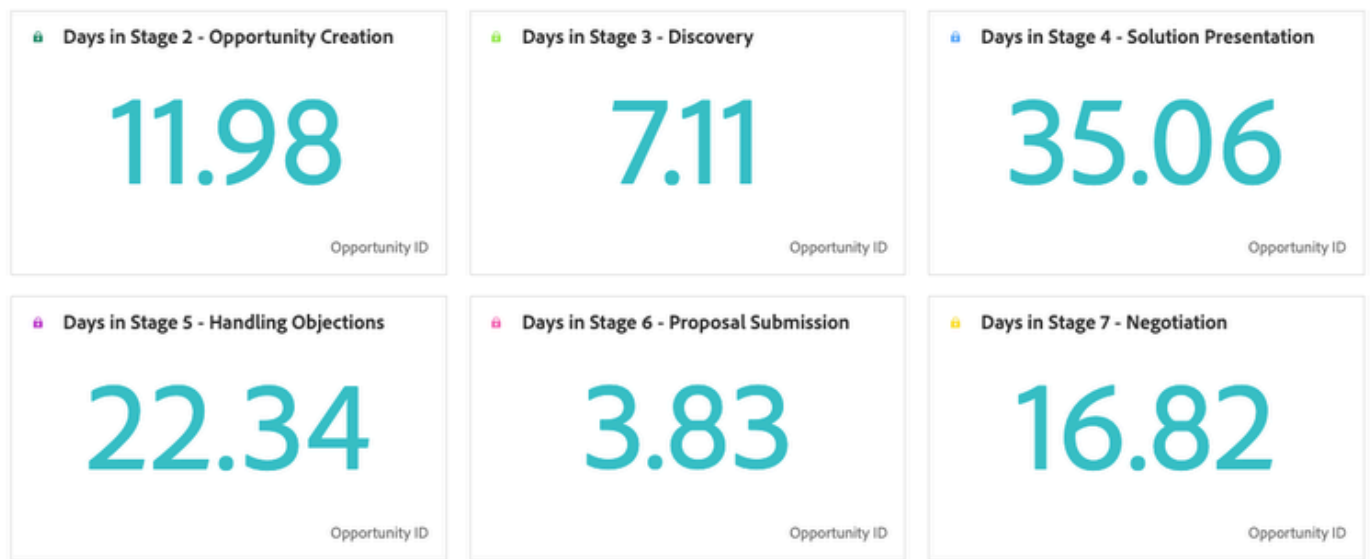
In this exercise, you will build a summary visualization to calculate the **average number of days opportunities spend in Opportunity Creation (Stage 2)**. This will demonstrate how stage duration is derived and measured.

Steps:

- 1. Add a **Freeform Table** to your workspace.
- 2. Drag in **Opportunity ID** as the dimension.
- 3. Drag in the metric **Sales Stage Time – Opportunity Creation** (prebuilt Derived Field).
 - We will review how this Derived Field was built in section 4.3
- 4. Create a **Calculated Metric**:
 - Use the **Mean** function on *Sales Stage Time – Opportunity Creation*
 - Include zeros in the calculation
 - Name it: **Mean Days in Stage 2 – Opportunity Creation (YourName)**
 - Append your **first name and last initial** to the metric name
- 5. Add this calculated metric to the table.
- 6. Convert the visualization to a **Summary Number**.

Average Days in Sales Stage 2 - Opportunity Creation

	Sales Stage Time - Opportunity Creation	Mean Sales Stage Time - Opportunity Creation
Opportunity ID Page: 1 / 129,678 > Rows: 5 1-5 of 648,388	Feb 1Feb 28 7,770,596 out of 7,770,596	Feb 1Feb 28 11.98 out of 11.98
1. 00Q17690399971633536	25 0.0%	11.98 100.0%
2. 00Q17673983892849439	25 0.0%	11.98 100.0%
3. 00Q17650655636004433	25 0.0%	11.98 100.0%
4. 00Q17641151820448692	25 0.0%	11.98 100.0%
5. 00Q17644214156928031	24 0.0%	11.98 100.0%



- The **Sales Stage Time** metrics are powered by prebuilt Derived Fields that calculate time spent in each stage.
- The **Mean function** calculates the average number of days opportunities spend in that stage.
- You only need to build this once. Summary visualizations for other stages have been prebuilt using the same logic.

4.3 Using the Date Math function in Derived Fields

To get insights into how much time occurs between two events we can leverage a recently released function in Derived Fields within the Data View configuration called "Date Math". This section of the lab is an on-screen demo. Here are the steps we used for your reference:

1. Navigate to Data Management → Data Views → [choose your data view] → Components → Derived Fields → Add Derived Field
2. Create a Case When rule for the first event and set the condition (event or dimension value), and returns the system-generated timestamp for the event
3. Create a Case When rule for the second event and set the condition (event or dimension value), and returns the system-generated timestamp for the event
4. Create a Date Math Function that subtracts the two variables and produces the time between the two events
5. Set the container (in this case, Opportunity)
6. Set the granularity (second, minute, hour, day, etc)
7. Set whether the timestamp should be the first or last occurrence of the condition in the Case When rules
8. Once you save it, remember to include the new Derived Field as a Metric in your Data View and save your data view

Output

DATE MATH - FINAL OUTPUT ?

Scope *

Opportunity

Value 1 *

Time - Qualifying Le..x

Return the first

Return the last

Value 2 *

Time - Deal Closure x

Return the first

Return the last

Output Granularity *

Day

Time - Deal Closure

CASE WHEN ?

If

Value *

Closed-Won x

Criterion *

Is set

Then set value to

Value *

Timestamp x

Time - Qualifying Leads

CASE WHEN ?

If

Value *

Sales Stage Name x

Criterion *

Equals

Value *

Opportunity Creation

Then set value to

Value *

Timestamp x

29 / 44

Created at Aug 20, 2026

When you refresh your components in CJA, your new Date Math Derived Field should be visible

4.4 Checkpoint / Reflection

You have now quantified how long opportunities spend in a specific stage of the sales cycle. This type of analysis is critical for understanding **pipeline velocity**, not just volume.

By measuring time in stage, TensorRack can identify where delays occur and prioritize efforts to reduce cycle time, accelerate deal progression, and improve overall revenue efficiency.

10. 5. Build a Segment for Stalled Opportunities

Identify opportunities that are no longer progressing through the pipeline.

5.1 Objectives

In this exercise, you will learn how to create a segment to isolate stalled opportunities. By the end, you will be able to identify where deals are sitting idle and focus attention on the stages that require intervention.

5.2 Activity

TensorRack now understands where opportunities drop off and how long they spend in each stage. The next priority is to isolate the deals that are still open but have shown no recent stage movement.

In this exercise, you will create a custom segment called **Stalled Opportunities** and use it to visualize where stalled deals are accumulating across the sales funnel.

Steps

1. Create a new segment named **Stalled Opportunities (YourName)**.
2. Set the **container** to **Opportunity**.
3. Build the segment using the following logic:
 - **Closed-Won = 0**
 - **Closed-Lost = 0**
 - Add a new container and include:
 - **Sale Stage Started = 0**
 - **Last 60 Days** (use preset date range)
4. Add a **Freeform Table** to your workspace.
5. Drag in **Sales Stage Name** as the dimension.
6. Drag in the **Opportunities** metric.
7. Apply the **Stalled Opportunities** segment to the metric.
8. Right-click the metric heading and select **Visualize > Bar Chart**.

Definition *

Include Opportunity Options

Closed-Won equals 0 X

And ▼

Closed-Lost equals 0 X

And ▼

▼ Last 60 days AND Sale Stage Started = 0 □ ⚙️

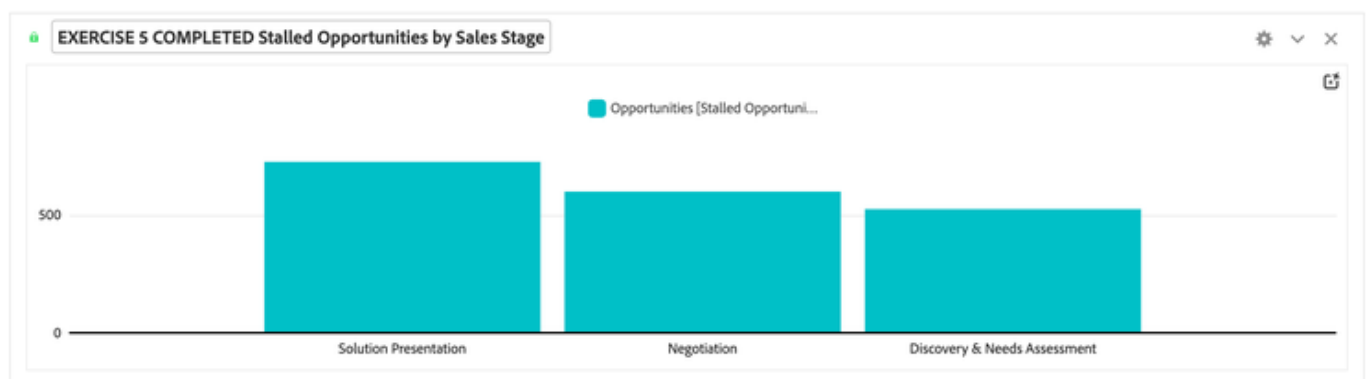
Last 60 days ⓘ X

And ▼

Sale Stage Started equals 0 X

EXERCISE 5 COMPLETED Stalled Opportunities by Sales Stage

		Opportunities
		Stalled Opportunities
Sales Stage		
Page: 1/ 1 Rows: 50 1-3 of 3		
	Mar 1	Mar 31 1,381 out of 4,671
1. Solution Presentation		724 52.4%
2. Negotiation		598 43.3%
3. Discovery & Needs Assessment		524 37.9%



- This segment identifies opportunities that are still open and have not entered a new sales stage in the last 60 days.
- The **Opportunity container** ensures the logic is evaluated at the opportunity level.
- This analysis helps reveal where open deals are sitting idle and where pipeline intervention may be needed most.

5.3 Checkpoint / Reflection

You have now isolated stalled opportunities and visualized where they are accumulating across the funnel. This shifts the analysis from general pipeline visibility to **targeted intervention**.

By identifying where deals are sitting idle, TensorRack can prioritize outreach, align with sales, and take action to re-engage opportunities before they are lost.

11. 6. Analyze Engaged Personas

Identify which people inside each opportunity are driving engagement.

6.1 Objectives

In this exercise, you will learn how to analyze persona-level engagement within a set of opportunities. By the end, you will be able to identify which job titles and specific individuals are most engaged and use that insight to support follow-up and activation.

6.2 Exercise

TensorRack now wants to understand **which people inside each opportunity are driving engagement during the sales cycle**. After identifying where deals slow down, the next step is to see **who is most engaged so far** and how that insight can support follow-up and activation.

In this exercise, you will use a prebuilt freeform table to analyze engaged personas by opportunity.

Steps

- 1. Locate the prebuilt **Engaged Personas** freeform table below.
- 2. Add **Opportunity ID** as a **drop-down filter** at the top of the panel.
- 3. Select the **top 5 Opportunity IDs** and observe how the table refreshes.
- 4. Review the table to see which **Job Titles** show high, medium, or low engagement within those selected opportunities.
- 5. Drag the **Email** dimension and drop it **below Data Scientist**.
- 6. Review the individuals listed to identify the people with the highest engagement so far in the sales cycle.
 - These contacts could be exported as a CSV or used to create an audience.

Opportunity ID

+4

00...

X

X

▼

Industry (Event)

No filter

▼

Reset all

00Q17745912563582925

00Q17735410626769730

00Q17732994739658270

00Q17722871884391696

00Q17722424702003305

Personas

people inside each opportunity are driving engagement during the sales cycle. After identifying where deals slow down, the next step is to see who is most engaged so far and how that insight can support follow-up and activation.

form table to analyze engaged personas by opportunity.

Engaged Personas + Panel Filters									
People									
High EngagementMedium EngagementLow Engagement									
Job Title	Feb 1Feb 2813 out of 13			Feb 1Feb 283 out of 3			Feb 1Feb 280 out of 0		
1. Data Scientist	3 23.1%			0 0.0%			0 0.0%		
Email	Feb 1Feb 283 out of 3			Feb 1Feb 280 out of 0			Feb 1Feb 280 out of 0		
1. shkondo@fabricfusion.com	1 33.3%			0 0.0%			0 0.0%		
2. ndyke@fabricfusion.com	1 33.3%			0 0.0%			0 0.0%		
3. jocaire@fabricfusion.com	1 33.3%			0 0.0%			0 0.0%		
2. UX/UI Designer	2 15.4%			0 0.0%			0 0.0%		
3. Test Lead	1 7.7%			0 0.0%			0 0.0%		
4. Retail Analyst	1 7.7%			0 0.0%			0 0.0%		
5. Network Architect	1 7.7%			0 0.0%			0 0.0%		

- The drop-down filter lets you quickly focus the table on a specific set of opportunities.
- This view helps you move from high-level persona analysis to the actual people engaged within each deal.
- Once identified, these contacts can be exported to a CSV or used to create an audience for follow-up and activation.

6.3 Checkpoint / Reflection

You have now moved from role-level engagement to the actual people participating in the deal. This is where persona analysis becomes operational.

By identifying the most engaged individuals within key opportunities, HelioCore can support sales follow-up, build targeted audiences, and prioritize outreach to the stakeholders who are already showing meaningful interest.

12. 7. Create and Publish an Audience from Content Engagement

TensorRack now wants to turn insight into action. After identifying engaged personas and understanding pipeline behavior, the next step is to activate high-value audiences based on real engagement signals.

In this exercise, you will create an audience of people who are still in the **Discovery stage** and have shown strong early interest in key content types. You will then publish this audience to **Adobe Experience Platform** for activation.

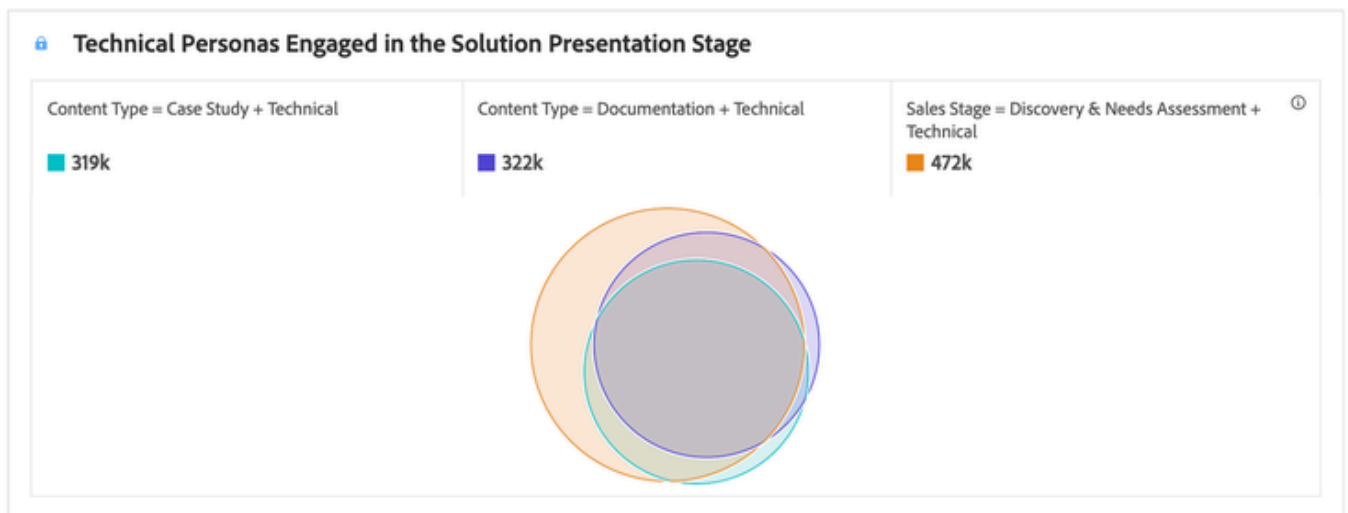
7.1 Objectives

- Identify high-value audiences based on content engagement and sales stage
- Create an audience directly from a visualization
- Publish that audience to Adobe Experience Platform for activation

7.2 Exercise: Build and Publish an Audience

Steps

1. Locate the prebuilt **Venn diagram visualization** in the panel below.
2. Identify the intersection of people who:
 - Are in the **Discovery & Needs Assessment** stage
 - Have engaged with **Case Study** content
 - Have engaged with **Technical Documentation**
3. Right-click directly on the **intersection of the Venn diagram**.
4. Select **Create Audience**.
5. In the audience builder:
 - Provide a name (append your first name and last initial)
 - Optionally add a short description
 - Confirm the segment definition reflects:
 - Content Type = Case Study
 - Content Type = Technical Documentation
 - Sales Stage = Discovery & Needs Assessment
6. Leave the **refresh frequency** set to *One time*.
7. Click **Publish**.



Create audience

View Sample IDs Cancel Publish

CJA B2B Edition Demo (Summ... CJA B2B Edition Demo (Summit 2026)

Search components

- Sales Stage = Discovery & ...
- Content Type = Document...
- Content Type = Case Study
- Stalled Opportunities
- Open opportunities
- Opportunity Exists
- All Data
- Low Engagement
- Medium Engagement
- High Engagement
- Opportunities - Slow Closers
- Opportunities - Fast Closers
- Accounts - High Satisfaction
- Accounts - Low Satisfaction
- Online+Offline People
- Repeat visitors

Name * Summit Audience Tags Type tags here

Description Test

This audience will be published **one time** as a collection of person IDs from **Mar 1, 2025 - Mar 31, 2026** that match the criteria of select segments below.

Refresh frequency * One time

Refresh audience limit: 0 of 150

One time date range * 3/1/2025, 12:00 AM - 3/31/2026, 11:59 PM

Segment (1 of 20) * (Content Type = Case Study) AND (Content Type = Documentation) AND (Sales Stage = Discovery & Needs Assessment)

Data Preview: Mar 1, 2025 - Mar 31, 2026

24K TOTAL PEOPLE

Audience size limit 24K / 20M

Estimated audience return Next 7 days

12 ESTIMATED TO RETURN

Preview metrics Events

13M EVENTS

25% OF TOTAL EVENTS

Preview metrics Sessions

2.6M SESSIONS

24% OF TOTAL SESSIONS

- This audience represents people who are **actively researching and engaging with high-value content early in the buying journey**.
- These individuals are strong candidates for targeted follow-up (invites to a conference for example), as they are both **engaged and still in a decision-shaping stage**.
- Publishing this audience to **Adobe Experience Platform** enables activation across channels such as email, paid media, or sales outreach.

7.3 Checkpoint / Reflection

You've now moved from analysis to action.



Instead of just identifying engaged personas, you've created a **targetable audience** based on real behavioral signals and pipeline context.

This is where CJA B2B becomes especially powerful: enabling you to **translate insight into activation** by pushing high-value audiences directly into Adobe Experience Platform for immediate use.

13. 8. CX Enterprise Coworker

Overview

Adobe CX Enterprise Coworker is an AI-powered teammate that reimagines the nature of work for organizations, teams, and individuals. Coworker elegantly automates customer experience and marketing workflows so organizations can focus on realizing their business goals and transforming outcomes, not coordinating tasks. As an agentic engine, Coworker takes a new innovative approach to automating business process. It elevates AI model performance and accuracy by bringing together data, intelligence, collaboration and agentic skills execution with enterprise context, governance, and human oversight built in.

Coworker Direct Link

Sample Chat Prompts

- **General**

- *What can you help me with?*
- *How is CJA B2B different than CJA?*

- **Product Knowledge**

- Walk me through how to set up an account-based connection in CJA B2B Edition, step by step
- How do I decide between Opportunity, Account, and Buying Group containers when building a segment or running attribution?
- *How does the Content Analytics integration work in CJA?*

- **Analysis**

- *What kind of analysis questions can I ask in CJA B2B?*
- Find the dimensions I'd use to analyze the sales pipeline
- How often do deals get stalled in Discovery over the last 90 days?
- How long do deals take from Discovery to Closed Won by deal size?

- **Root Cause Analysis**

- Were there any anomalies across channels for the last 6 months across accounts, buying groups, opportunities and revenue closed lost?
- Why are Accounts declining in the Social and Display channels?

Documentation

- [Overview](#)
- [Chat](#)
- [Analyze CJA Data](#)
- [Analytics Use Cases](#)
- [Sandbox Tooling Agentic Skills](#)

14. Lab Resources

Lab Recordings, Resources & Survey

Your post-lab page for content, recordings, helpful links to product documentation, and our survey.

HOL Survey:

<https://forms.cloud.microsoft/r/Rqb1ihQPbs>



HOL Recording:



Completed CJA B2B Workspace:

 [CJA B2B Edition - HOL Aug 2026 \(Start H...](#)



HOL Presentation:

 [CJA B2B Edition HOL - August 2026.pdf](#)



Resources:

- [Adobe Experience League](#)
- **AEP Source Connectors & Destinations**
 - **Question:** How easy is it to connect data into and out of AEP?
 - **Answer:** Native connectors support many common integrations, while some use cases may require custom integrations. Adobe-to-Adobe integrations are also supported.
- **Buying Group Schema**
 - **Question:** Is there an out-of-the-box Buying Group schema?
 - **Answer:** No dedicated Buying Group schema currently; the recommendation is to extend the Opportunity XDM schema, with a dedicated Buying Group schema being evaluated.
- **Report Suites in CJA**
 - **Question:** How do Adobe Analytics report suites fit into CJA datasets?
 - **Answer:** Each report suite becomes a dataset in AEP, and multiple report suites can be combined using a union schema and a CJA connection.

- **Marketing Channel Processing Rules**

- **Question:** Does CJA replace Marketing Channel Processing Rules?
- **Answer:** Derived Fields cover that use case and provide additional flexibility beyond traditional processing rules.

- **Identity Stitching**

- **Question:** How does CJA handle anonymous and known identities?
- **Answer:** Field-based stitching, graph-based stitching, and upcoming account-based stitching options are available.

- **Impression Data**

- **Question:** Can impressions be tied back to individual people or accounts?
- **Answer:** Only when the source platform provides identity-level data; otherwise summary-level analysis can still be used.

- **Derived Field Validation**

- **Question:** Why didn't some derived field values match the original totals?
- **Answer:** The discrepancy was attributed to demo data behavior; production data should align logically.

- **Dimension & Metric Limits**

- **Question:** Are there limits similar to Adobe Analytics?
- **Answer:** CJA does not have traditional low-traffic limits, character limits, or fixed eVar-style constraints.

- **URL Parsing & Character Limits**

- **Question:** Do CJA dimensions have the same character limits as Adobe Analytics eVars?
- **Answer:** No, those Adobe Analytics limitations do not apply in CJA.

- **Workspace Comments**

- **Question:** Are comments only visible to tagged users?
- **Answer:** No. Comments are visible to anyone with access to the project; tagging only sends a notification.

- **Saving Workspace Projects**

- **Question:** Why couldn't changes be saved in the lab project?
- **Answer:** Participants needed to use "Save As" to create their own copy.

- **Audience Creation**

- **Question:** Can audiences be created directly from Workspace analysis?
- **Answer:** Yes. Audiences can be created from Workspace selections and published to AEP for activation.

- **Email Addresses & PII**

- **Question:** Can email addresses be used in CJA analysis?
- **Answer:** Yes, but appropriate governance, privacy, and data management controls should be in place.

- **Enterprise Coworker Governance**

- **Question:** How can organizations standardize definitions and metrics used by Enterprise Coworker?
- **Answer:** Skills, business context, approved metrics, and organizational guardrails can be used to control responses and definitions.

- **CJA Implementation**

- **Question:** Is there a separate implementation lab, and does website tagging change for CJA?
- **Answer:** No separate implementation lab was identified; existing website tagging approaches remain unchanged, while implementation focuses on AEP ingestion, modeling, and configuration.

- **Enterprise Coworker Licensing**
 - **Question:** Does Enterprise Coworker require a separate license?