

KL 2025 - Adobe Experience Platform ...

KL 2025 - Adobe Experience Platform Hands on Lab

1. KL AEP Hands-On Lab
2. Lab 1 - Introduction to AEP
3. Lab 2 - Journeys and Content
4. Lab 3 - Omni-channel Insights

1. KL AEP Hands-On Lab

Welcome to the Adobe AEP Hands-on Lab - Kuala Lumpur Edition!

Today everyone will be doing Lab 1. Then you have the choice of Lab 2 or Lab 3. Please select the exercise that is most relevant for your role and business objectives.

Exercise	Target Audience
<u>Lab 1 - Introduction to AEP</u>	New users to Adobe Experience Platform
<u>Lab 2 - Journeys and Content</u>	Marketing automation and journey managers interested in exploring Adobe Journey Optimizer
<u>Lab 3 - Omni-channel Insights</u>	Data and insights practitioners interested in exploring Customer Journey Analytics

Access

Login details have been provided on your desk. The provided laptops should already be logged in but if not, feel free to login again using the provided details.

Login at **<https://platform.adobe.com>**

The password for all users is **kIAEP@2025**

If you have issues logging in raise your hand and one of the facilitators will come help you.

2. Lab 1 - Introduction to AEP

Learning Objectives

In this exercise you will learn how to view a real-time customer profile in Adobe Experience Platform and understand how the different pieces of information collected about that customer are stitched together through the evolving Identity Graph.

You will learn about the different types of audiences that can be created through the Adobe Experience Platform rule-based audience builder, including real-time audiences for onsite personalisation and look-alike audiences for expanded reach.

Scenario

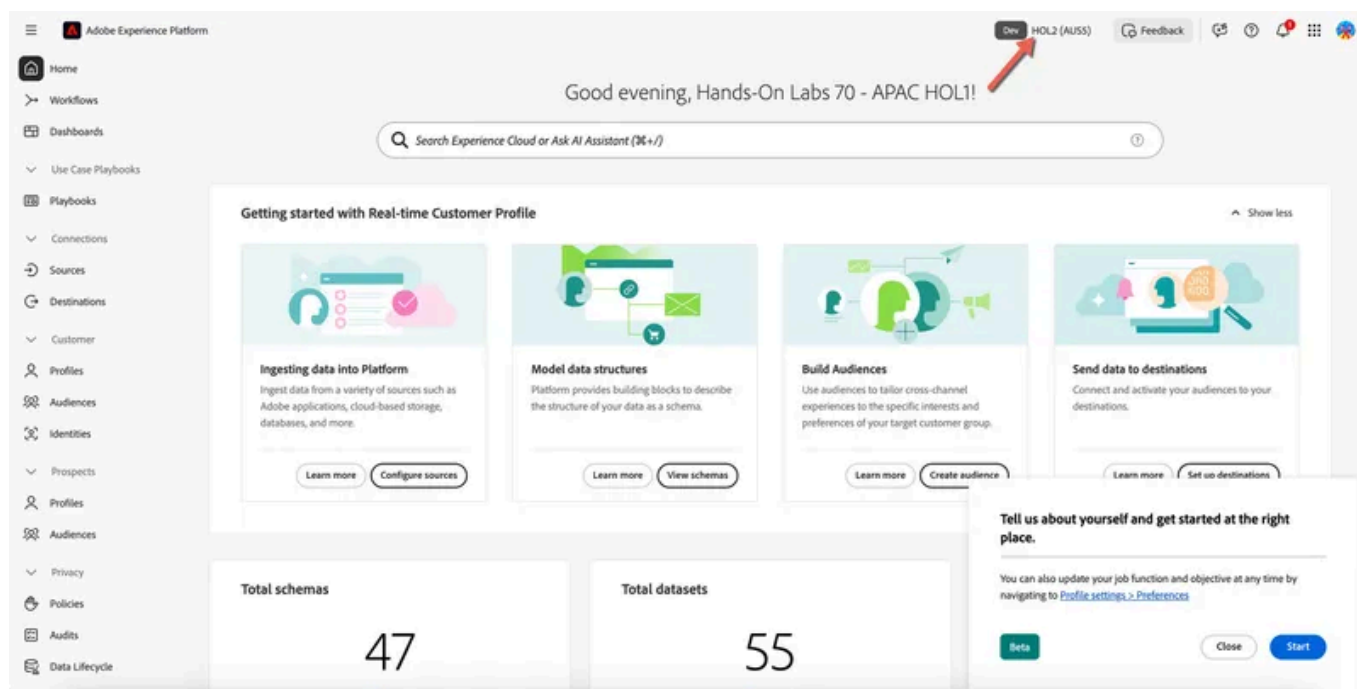
SecurFinancial is a leading retail bank offering personal banking services across a range of loans, credit cards and insurance products. They have recently completed their Adobe Experience Platform Real-Time CDP implementation. With unified customer profiles and real-time data streaming in from digital and offline channels, the bank is now ready to activate its personalization strategy.

As part of a cross functional team you have been briefed on an upcoming campaign to promote a new Travel Credit Card. The campaign brief includes:

- A personalised experience when customers land on the website from any of the campaign ads
- Retargeting on social when users start an application but do not complete it
- Advertising suppression for anyone who made a purchase in the last month

Access

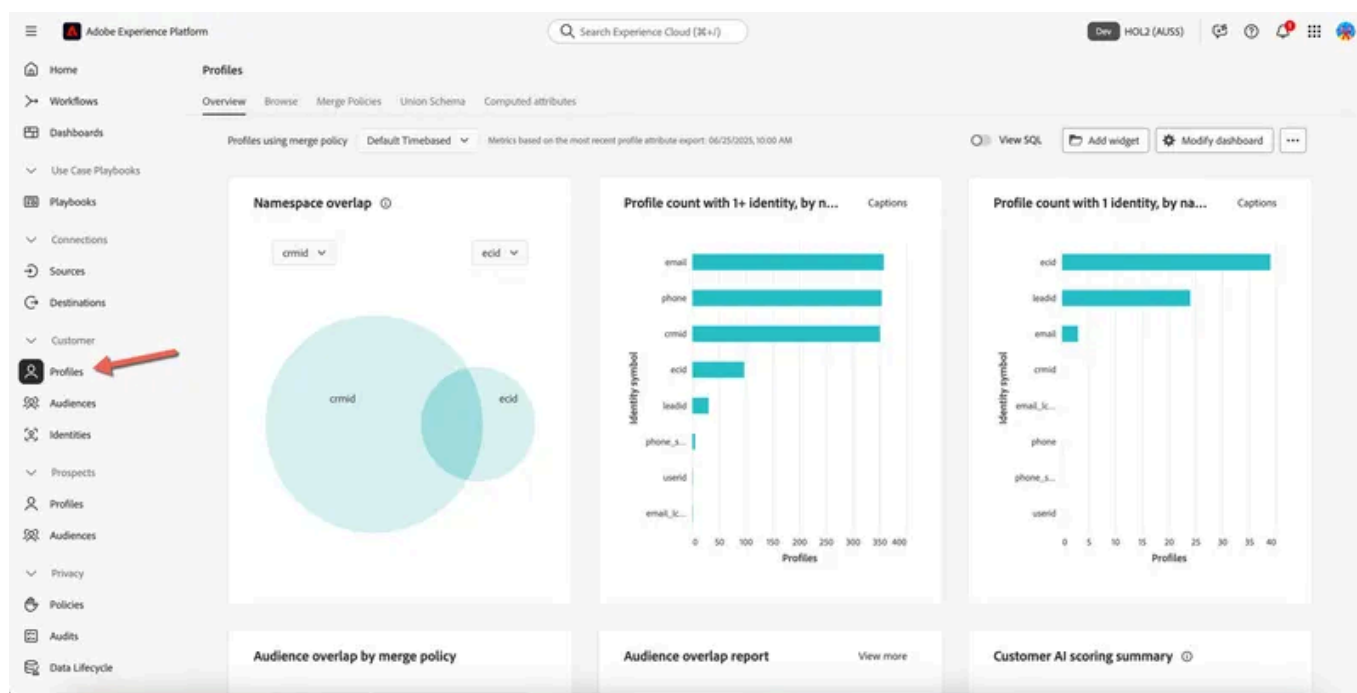
Before you get started please confirm that you are in the right sandbox - it should be **HOL2 (AUS5)**



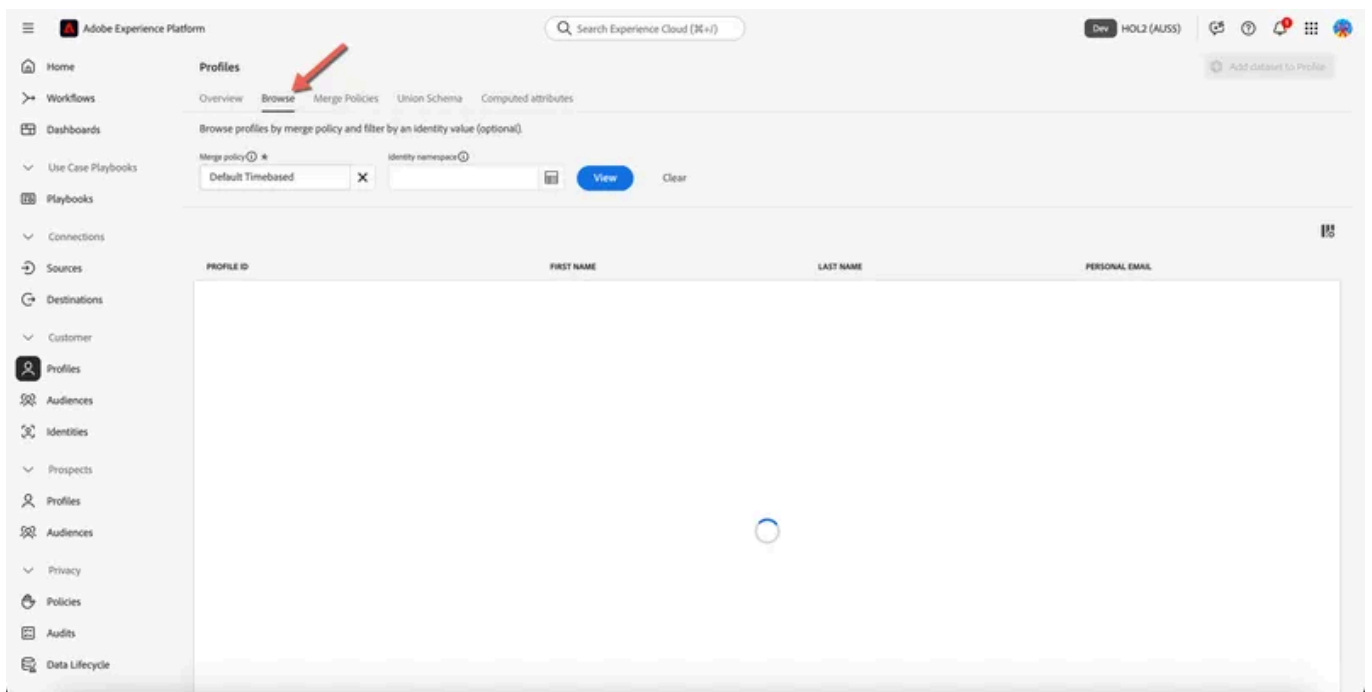
2.1 The Unified Profile

Before we start creating audiences for our use case, let's take a quick look at Adobe's Unified Profile combining data from multiple sources into an actionable profile.

Browse to **Customer → Profiles**. The **Overview** dashboard shows insights on how many profiles exist in the sandbox along with the distribution of identities.

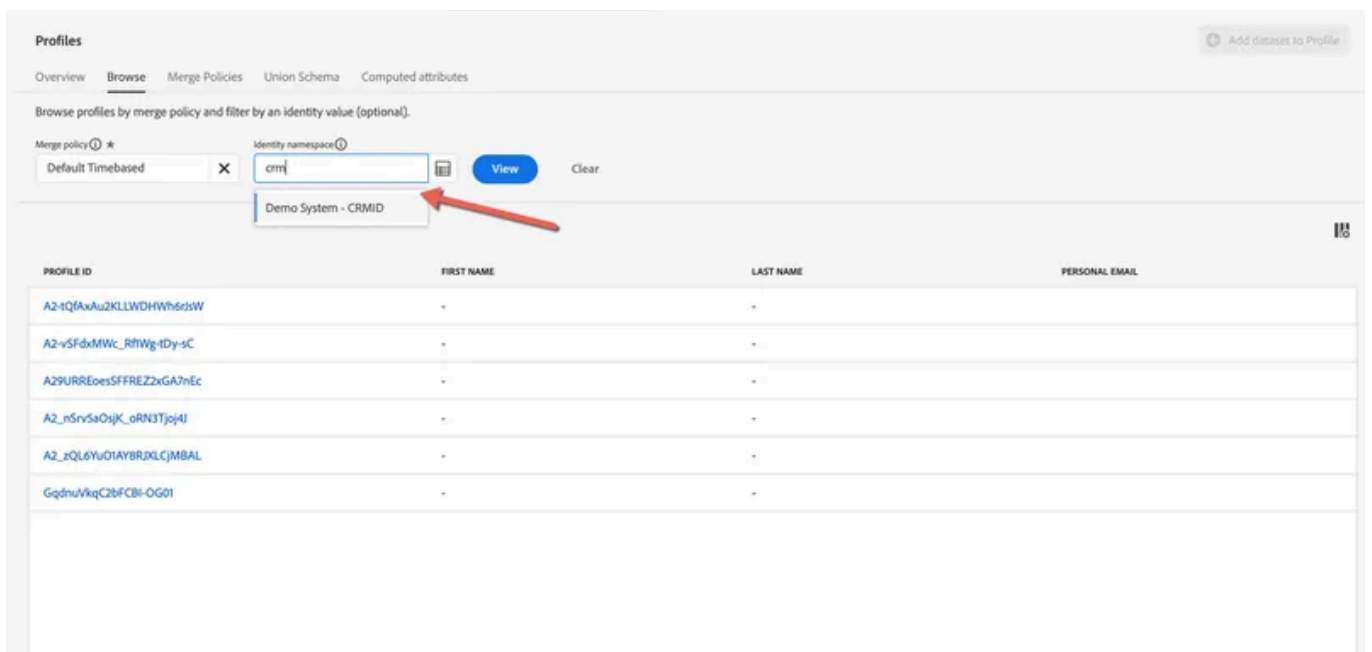


To lookup a specific profile, move to the **Browse** tab.



Profiles can be retrieved by any of the identities that are attached to that profile. Which identity namespaces are leveraged depends on your organisations requirements. For this exercise we will use a CRM Id to look up your profile.

Start typing **crm** in the **Identity namespace** field, select **Demo System - CRMID** when it appears.



Type **SUMMIT_CRM_01** into the **Identity value** field and click **View**

Profiles Add dataset to Profile

Overview **Browse** Merge Policies Union Schema Computed attributes

Browse profiles by merge policy and filter by an identity value (optional).

Merge policy Identity namespace Identity value View Clear

PROFILE ID	FIRST NAME	LAST NAME	PERSONAL EMAIL
A2-6RcR9MZEKJRNQhV8EMk	-	-	-
A28FQ2fHKbcSY-eJsqjKWvMH	Chet	Seiler	syd13@gmail.svpoc.io
BVrqzwVvzrMndd_oImopf7L6aHP4qA	Chet	Seiler	syd13@gmail.svpoc.io
BVrqzwVvzrMne-voImopf7L6aHP4qA	Roscoe	Camies	syd76@gmail.svpoc.io
BVrqzwVvzrMnffN_oImopf7L6aHP4qA	Jordain	Gullford	syd83@gmail.svpoc.io
BVrqzwVvzrMnfePojmopf7L6aHP4qA	Nevil	Gaffney	syd94@gmail.svpoc.io
BVrqzwVvzrMnfevoImopf7L6aHP4qA	Marco	Petrasso	syd96@gmail.svpoc.io
BVrqzwVvzrMnffPojmopf7L6aHP4qA	Ed	Lomasna	syd98@gmail.svpoc.io
BVrqzwVvzrMnffoImopf7L6aHP4qA	Annalise	Thew	syd99@gmail.svpoc.io
BVrqzwVvz7LpporfoImopf7L6aHP4qA	Sydney	Summit	summit@gmail.svpoc.io
GqdnUuV7Tn8dZYSSHOj9J_63fzw	Karalynn	Kloser	syd89@gmail.svpoc.io

Click the **PROFILE ID** to view the profile details.

Profiles Add dataset to Profile

Overview **Browse** Merge Policies Union Schema Computed attributes

Browse profiles by merge policy and filter by an identity value (optional).

Merge policy Identity namespace Identity value View Clear

PROFILE ID	FIRST NAME	LAST NAME	PERSONAL EMAIL
GqdnUuVmqF2rJSUMMIT-CRM-01A	Sydney	Summit	summit@gmail.svpoc.io

The **Detail** tab shows us some basic information about the profile, which fields are displayed here can be customized according to business needs.

Profiles > Profile GqdnvVmQF2r/SUMMIT-CRM-01A

Detail Attributes Events Audience membership

Profile using merge policy Default Timebased Last modified time: 06/25/2025, 9:57 PM

☒ Customize profile details ☐ Show display names

Customer profile



Sydney Summit

Profile ID

Basic attributes

address

gender

birthDayAndMonth

number

city

Linked identities

Crmid
SUMMIT_CRM_01

Ecid
29016628130325641542036669838713310612

Email
summit@gmail.svpoc.io

[View identity graph](#)

Channel preferences

☒ Email ☒

☒ Push ☒

☒ SMS ☒

☒ Phone ☒

☒ Fax ☒

☒ Commercial email ☒

☒ Direct mail ☒

There are 2 main types of data collected against the profile, **Attributes** and **Experience Events**. Profile can change over time while Experience Events represent point in time interactions a profile has had with your brand, whether that's viewing a web page, watching a show, making a booking, calling the call center or visiting a store.

Click on the **Attributes** tab to view the full list of attributes ingested for this profile. These attributes can come from different source systems, Adobe Experience Platform will merge them in real-time.

Profiles > Profile GqdnvVmQF2r/SUMMIT-CRM-01A

Detail **Attributes** Events Audience membership

Profile using merge policy Default Timebased Last modified time: 06/25/2025, 9:57 PM

☒ Hub ☐ Edge

ATTRIBUTE	DISPLAY NAME	VALUE	↑ PATH
crmid	crmid	SUMMIT_CRM_01	._demoapac.identification.core.crmid
ecid	ecid	29016628130325641542036669838713310612	._demoapac.identification.core.ecid
email	email	summit@gmail.svpoc.io	._demoapac.identification.core.email
csat	csat	9	._demoapac.individualCharacteristics.fsi.financialDetails.c...
currentTier	currentTier	Long-Term	._demoapac.individualCharacteristics.fsi.financialDetails.c...
financialAdvisor	financialAdvisor	Alex Agent	._demoapac.individualCharacteristics.fsi.financialDetails.c...
financialAdvisorID	financialAdvisorID	0354690	._demoapac.individualCharacteristics.fsi.financialDetails.c...
linkedBranch	linkedBranch	SF35015	._demoapac.individualCharacteristics.fsi.financialDetails.c...
mortgageHolder	mortgageHolder	true	._demoapac.individualCharacteristics.fsi.productOvervie...
accountName	accountName	Secure Financial BASIC	._demoapac.individualCharacteristics.fsi.products.0.accou...
accountType	accountType	Credit Card	._demoapac.individualCharacteristics.fsi.products.0.accou...
val	Choice Value	y	consents.collect.val
...	...	...	...

Click on the **Events** tab. Here you can see a chronological view of all the behavioural experience events coming from different source systems for this profile. These events are ingested in real-time from the sources like your website and mobile app.

Profiles > Profile GqdnvVmQF2rJSUMMIT-CRM-01A

Detail

Attributes

Events

Audience membership

web.webpagedetails.pageViews

06/25/2025, 9:53 PM

View all

ATTRIBUTE	DISPLAY NAME	VALUE	↑ PATH
ipV4	IPv4	159.196.170.41	environment.ipV4
type	Type	browser	environment.type
mobile	Mobileness	false	environment.browserDetails.userAgentClientHints...
platform	Platform	macOS	environment.browserDetails.userAgentClientHints.p...
brand	Brand	Chromium	environment.browserDetails.userAgentClientHints.b...

commerce.productViews

06/25/2025, 9:53 PM

View all

ATTRIBUTE	DISPLAY NAME	VALUE	↑ PATH
ipV4	IPv4	159.196.170.41	environment.ipV4
type	Type	browser	environment.type
mobile	Mobileness	false	environment.browserDetails.userAgentClientHints...

Move to the **Audience membership** tab. Here you can see which audiences the profile is currently a member of, this list will update as the profile moves in and out of audiences based on their attributes and behavior.

Profiles > Profile GqdnvVmQF2rJSUMMIT-CRM-01A

Detail

Attributes

Events

Audience membership

Hub

Edge

AUDIENCE NAME	DESCRIPTION	ORIGIN	AUDIENCE ID
SecurFinancial - Interested in Gold Credit C...		Real-time Customer Profile	51637991-914e-45dc-9833-1007d29fb287

Audience membership

Total results

1

Lastly, return to the **Details** tab and click to view the **Identity Graph**.

Profiles > Profile GqdnVmqF2rSUMMIT-CRM-01A

Detail Attributes Events Audience membership

Profile using merge policy Default Timebased Last modified time: 06/25/2025, 9:57 PM

[Customize profile details](#) ☐ Show display names

Customer profile



Sydney Summit

Profile ID
GqdnVmqF2rSUMMIT-CRM-01A

Basic attributes

address
summit@gmail.svpoc.io

gender
female

birthDayAndMonth
03-31

number
61402463547

city
Sydney

Linked identities

Crmid
SUMMIT_CRM_01

Ecid
29016628130325641542036669838713310612

Email
summit@gmail.svpoc.io

[View identity graph](#)

Channel preferences

Email ☒

Push ☒

SMS ☒

Phone ☒

Fax ☒

Commercial email ☒

Direct mail ☒

Here you can see a visualisation of the Identity Graph linking all of the different sources of information together to create our profile. You can see that there are multiple ECID's or Cookie ID's attached to the profile, this represents the different devices that the customer has identified themselves on.

Identities [Create identity namespace](#)

Overview Namespaces **Graph Viewer** Graph Simulation

Identity namespace Identity value [View](#) [Clear](#)

View graph

Filter by the time the link was established 06/25/2025, 10:09:44 PM

Identities Data source

View All (4) of 4 identities

IDENTITY SYMBOL	VALUE
crmid	SUMMIT_CRM_01
ECID	41825126004802366100318100187342442821
ECID	29016628130325641542036669838713310612
Email	summit@gmail.svpoc.io

ECID

Display name
ECID

Value
41825126004802366100318100187342442821

Last updated
06/25/2025, 10:09:44 PM

DATA SOURCE 1

Dataset name
[Demo System - Event Dataset for Website \(Global v1.1\)](#)

Dataset ID
67bdaf3cc09d222ab7631f5f

Schema name
[Demo System - Event Schema for Website \(Global v1.1\)](#)

Use the slider to see how the graph grew as the profile interacted over time.

The screenshot displays the Adobe Experience Platform Identities interface. The left sidebar contains navigation links: Home, Workflows, Dashboards, Use Case Playbooks, Connections, Sources, Destinations, Customer, Profiles, Audiences, Identities (highlighted), Accounts, Profiles, Audiences, Prospects, Privacy, Data Science, and Data Management. The main content area is titled 'Identities' and includes tabs for Overview, Namespaces, Graph Viewer, and Graph Simulation. The Graph Viewer tab is active, showing a graph with nodes for 'email', 'Email_LC_SHA256', and 'ECID'. A table on the right lists identity data for 'SUMMIT_SG'.

IDENTITY SYMBOL	VALUE
email	SUMMIT_SG
ECID	12025199221635319373708821679504245411
Email	summitsg@gmail.com
Email_LC_SHA256	fa6cd79365d245500580aca80cd0df61d70b5cd0a6dfba5086d7b795248cbe

2.2 Create a real-time audience

Now you've seen the types of data that lives on our real-time profile, let's create an audience targeting customers aged 18-24 who have visited the credit card application page today. This is the audience that will be used to target some of the personalized home page experience.

Click on **Customer → Audiences** and go to the **Browse** tab. This is the **Audience Portal** where you'll find all of the centralized audiences, regardless of how they were created. The **origin** column indicates where the audience was created:

- Segmentation Service - using data onboarded to the real-time profile
- Federated Audience Composition - using data that lives in a remote data warehouse
- Customer Journey Analytics - segments can be shared directly from the analysis done in CJA.
- Custom Upload - directly from files

Adobe Experience Platform

Search Experience Cloud (36+)

HOL2 (AUSS)

Import audience + Create audience

Audiences

Overview Browse Compositions Feeds Federated compositions

All Audiences

1-25 of 30

Evaluation summary Schedule all audiences

NAME	PROFILE COUNT	ORIGIN	CREATED	LAST UPDATED	TAGS	BREAKDOWN
Has Active Car Policy	63	Segmentation service	03/28/2025, 9:01 PM	03/28/2025, 9:01 PM	Insurance	
HOL Customer Profiles	50	Segmentation service	03/14/2025, 2:38 PM	06/25/2025, 10:14 PM		
High Monthly Premium	33	Segmentation service	03/28/2025, 9:41 PM	03/28/2025, 9:41 PM	Insurance	
Has Lapsed Car Policy	26	Segmentation service	03/30/2025, 3:40 PM	03/30/2025, 3:41 PM	Insurance	
Has active home and car policy	19	Segmentation service	03/28/2025, 9:01 PM	03/28/2025, 9:40 PM	Insurance	
Has Mobile App	7	Segmentation service	04/04/2025, 2:12 PM	04/04/2025, 2:12 PM		
Interested in Named Driver Insurance	2	Segmentation service	04/04/2025, 12:24 AM	04/04/2025, 12:24 AM		
SecurFinancial - Looking for a house	0	Segmentation service	02/25/2025, 10:59 PM	02/25/2025, 10:59 PM		
Vehicle Quote - Body Type is Pickup	0	Segmentation service	03/29/2025, 1:56 PM	03/29/2025, 1:58 PM	Insurance	
Interested in Health Insurance	0	Segmentation service	04/02/2025, 7:44 PM	04/02/2025, 7:45 PM	Insurance	
Vehicle Quote - Body Type is Convertible	0	Segmentation service	03/29/2025, 1:55 PM	03/29/2025, 1:55 PM	Insurance	-
SecurFinancial - Interested in Health Insurance	0	Segmentation service	03/26/2025, 8:41 PM	03/26/2025, 8:44 PM		-

1 of 2 pages

Click to **Create Audience**.

Audiences

Import audience + Create audience

Overview Browse Compositions Feeds Federated compositions

All Audiences

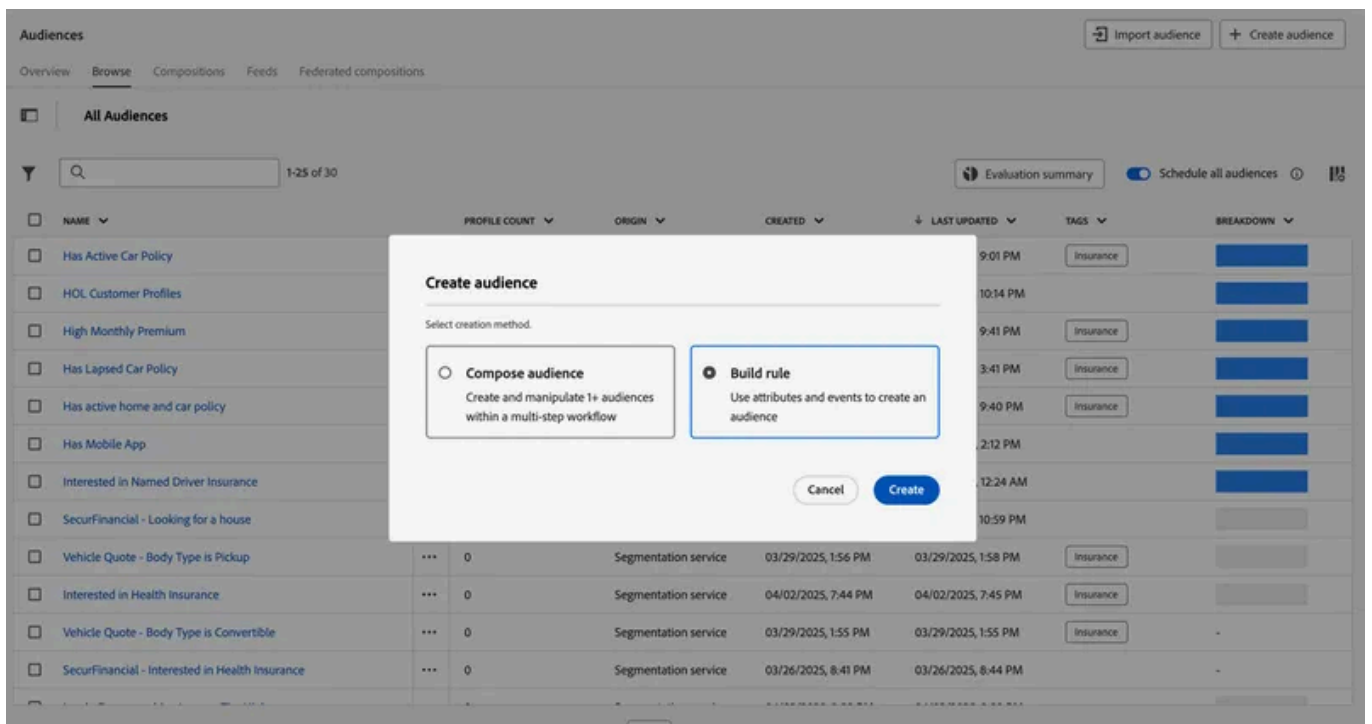
1-25 of 30

Evaluation summary Schedule all audiences

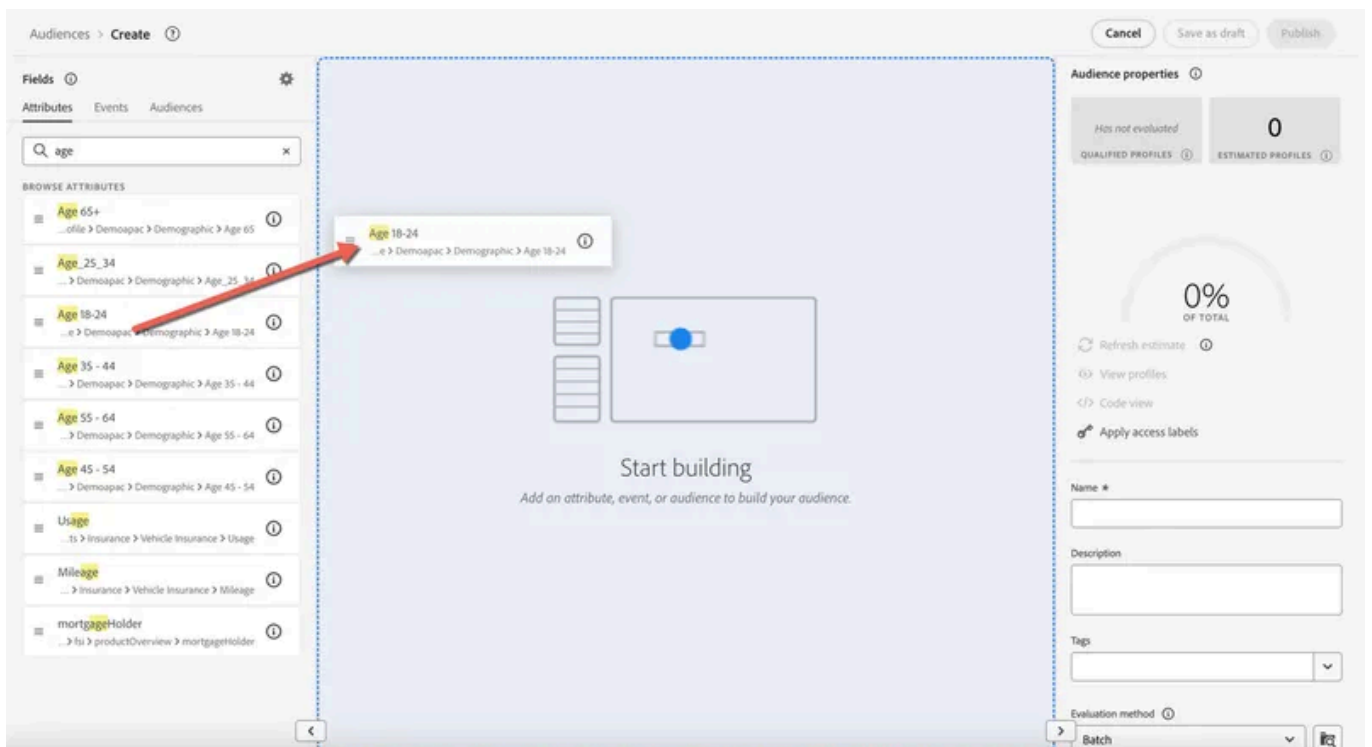
NAME	PROFILE COUNT	ORIGIN	CREATED	LAST UPDATED	TAGS	BREAKDOWN
Has Active Car Policy	63	Segmentation service	03/28/2025, 9:01 PM	03/28/2025, 9:01 PM	Insurance	
HOL Customer Profiles	50	Segmentation service	03/14/2025, 2:38 PM	06/25/2025, 10:14 PM		
High Monthly Premium	33	Segmentation service	03/28/2025, 9:41 PM	03/28/2025, 9:41 PM	Insurance	
Has Lapsed Car Policy	26	Segmentation service	03/30/2025, 3:40 PM	03/30/2025, 3:41 PM	Insurance	
Has active home and car policy	19	Segmentation service	03/28/2025, 9:01 PM	03/28/2025, 9:40 PM	Insurance	
Has Mobile App	7	Segmentation service	04/04/2025, 2:12 PM	04/04/2025, 2:12 PM		
Interested in Named Driver Insurance	2	Segmentation service	04/04/2025, 12:24 AM	04/04/2025, 12:24 AM		
SecurFinancial - Looking for a house	0	Segmentation service	02/25/2025, 10:59 PM	02/25/2025, 10:59 PM		
Vehicle Quote - Body Type is Pickup	0	Segmentation service	03/29/2025, 1:56 PM	03/29/2025, 1:58 PM	Insurance	
Interested in Health Insurance	0	Segmentation service	04/02/2025, 7:44 PM	04/02/2025, 7:45 PM	Insurance	
Vehicle Quote - Body Type is Convertible	0	Segmentation service	03/29/2025, 1:55 PM	03/29/2025, 1:55 PM	Insurance	-
SecurFinancial - Interested in Health Insurance	0	Segmentation service	03/26/2025, 8:41 PM	03/26/2025, 8:44 PM		-

1 of 2 pages

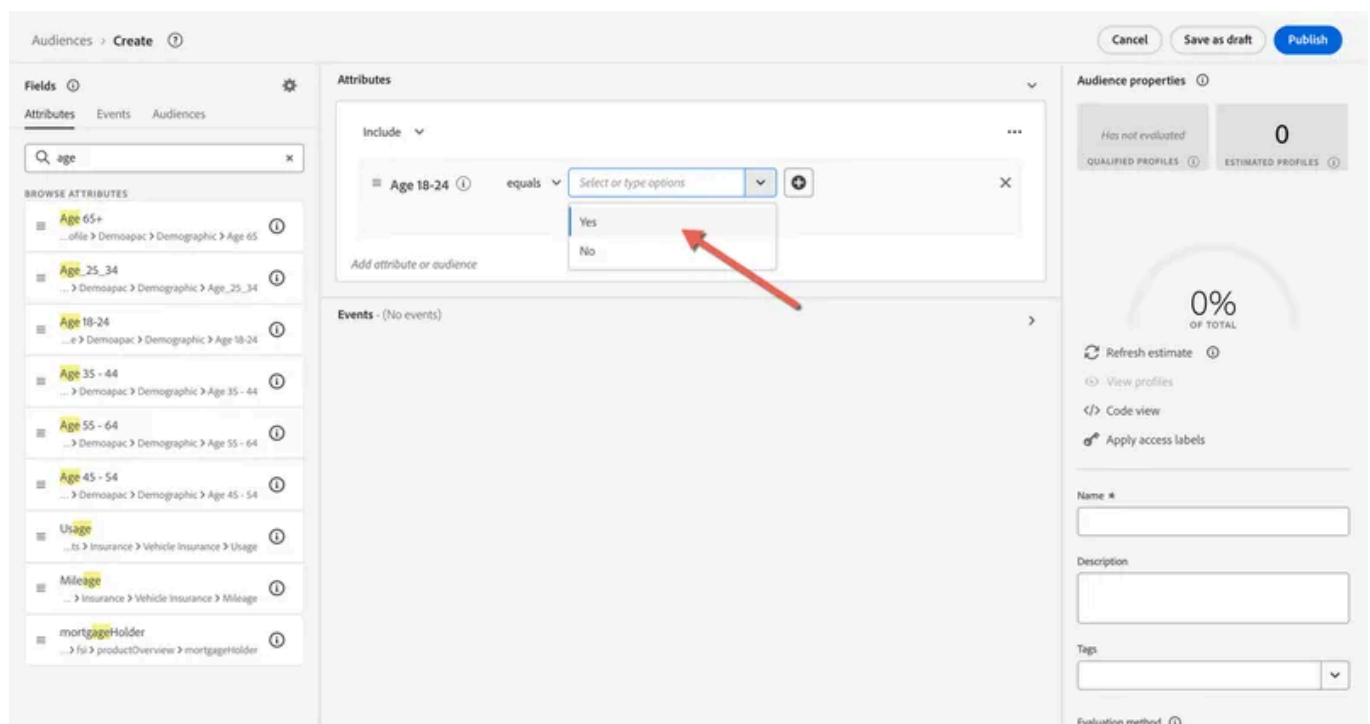
Change the option from compose audience to **Build rule** and click **Create**. We are going to create a new rule based audience using the attributes and events in our profile.



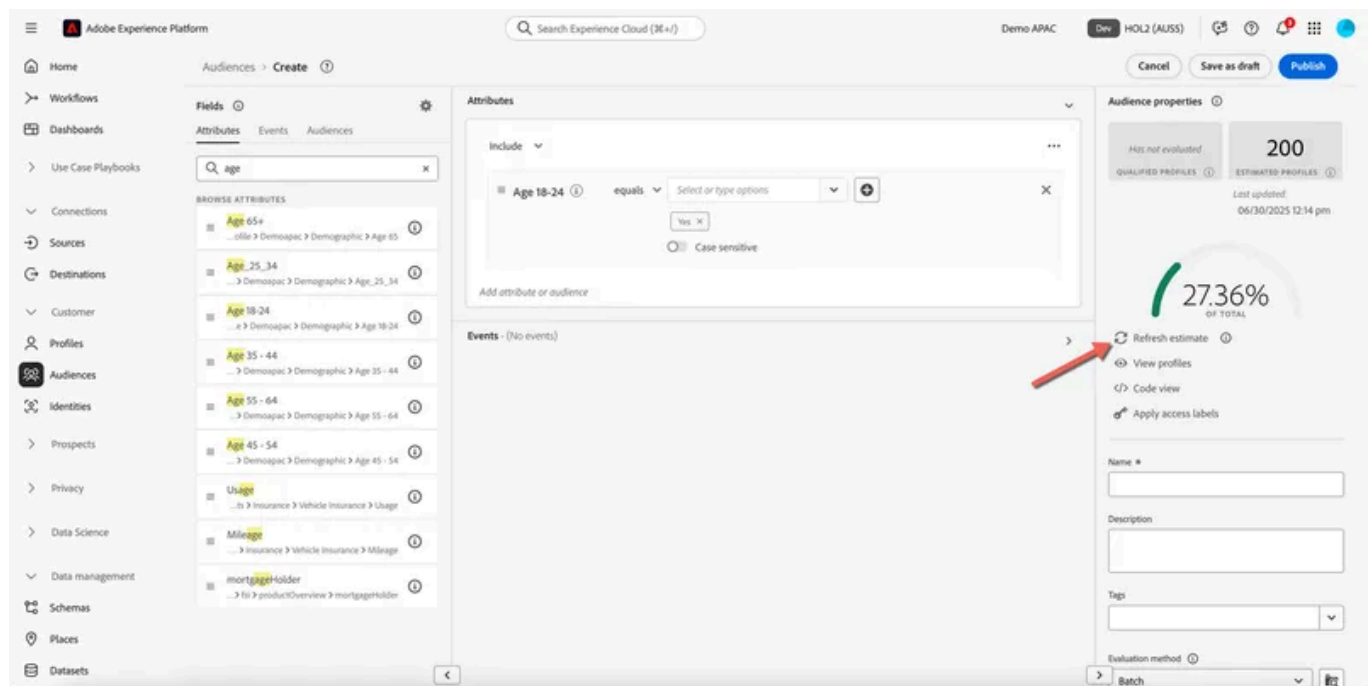
In the audience builder we can add attribute and event based rules. From the Attributes tab, search for **age** and drag the **Age 18-24** attribute into the builder.



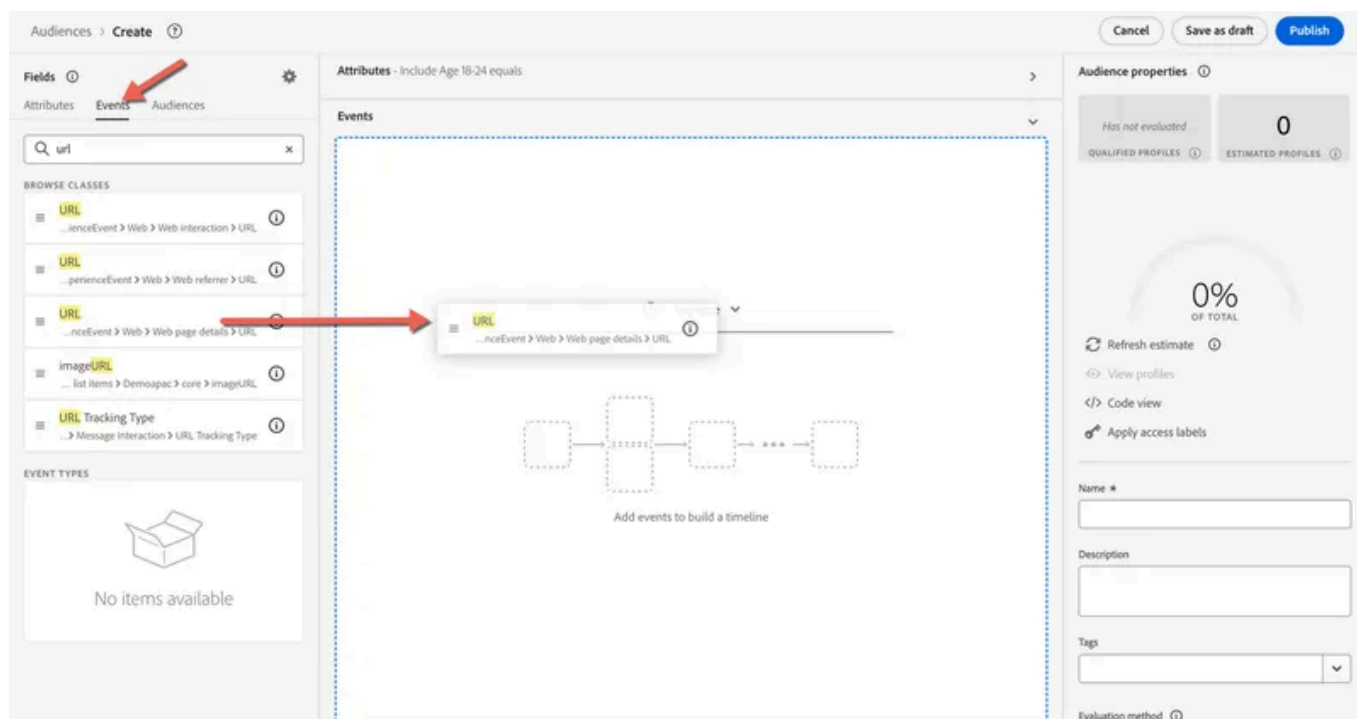
Set the value to **yes**



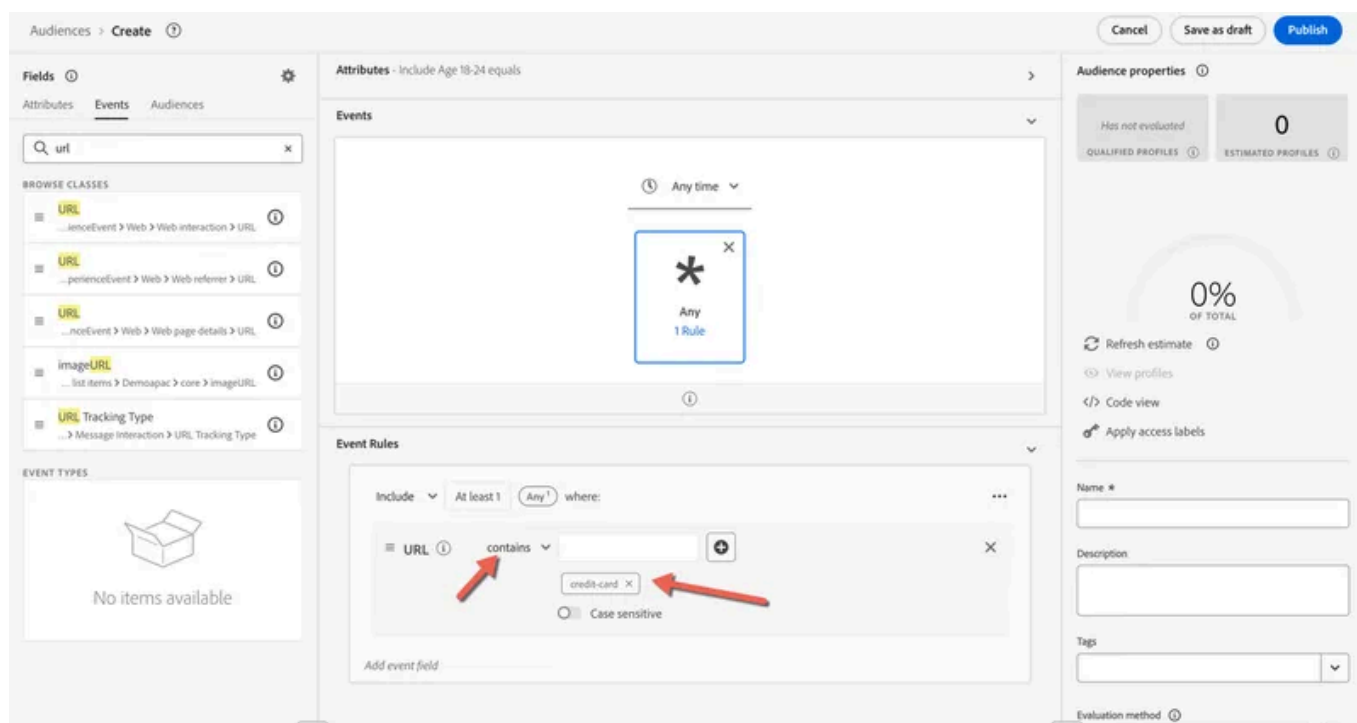
You can estimate the size of your audience at any time while configuring it. Click the **Refresh estimate** link in the **Audience properties** panel



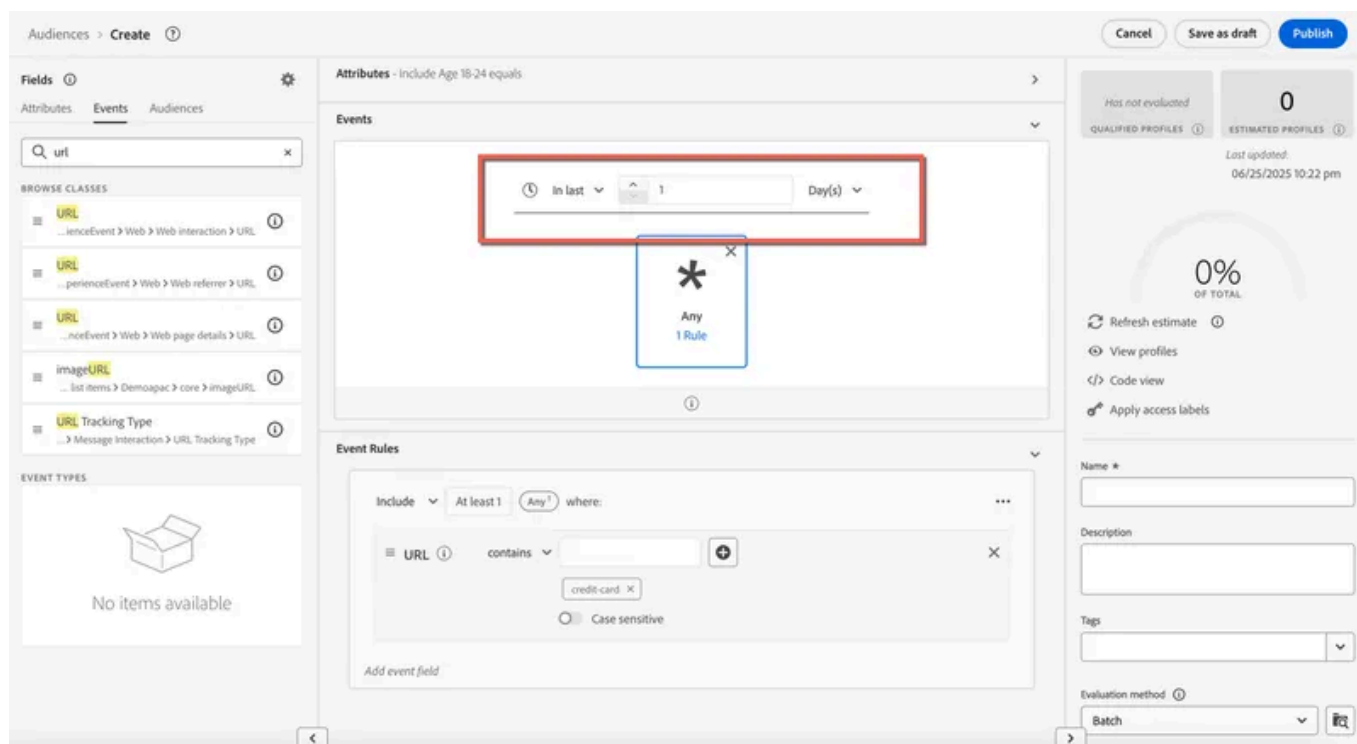
Now we want to add an event based rule. Change to the **Events** tab and search for **URL**. Drage the **Web page details > URL** field into the builder.



Change the operator from equals to **contains** and add the value **credit-card**. This will qualify anyone who's viewed a web page with the word credit-card in the url.

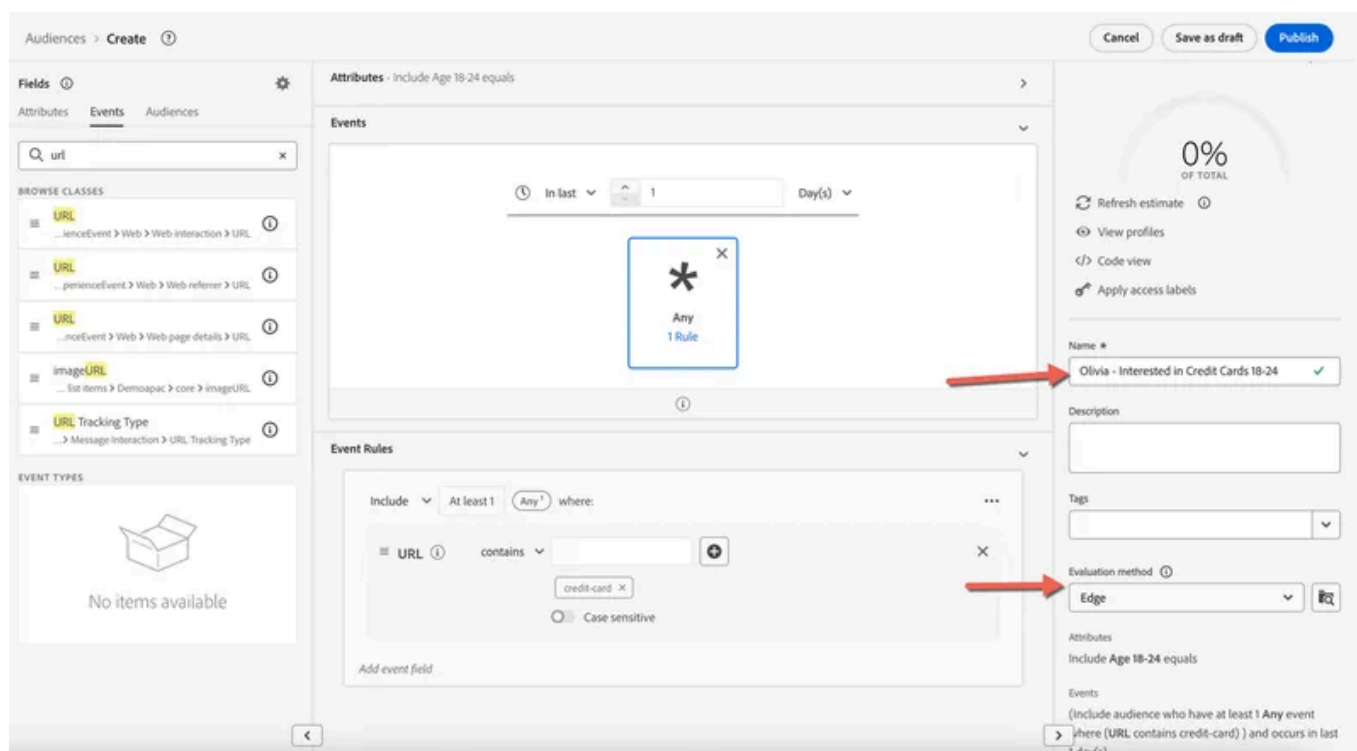


Now let's add a time frame so users will drop out of the audience if they don't show continued interest. Change the setting from any time to **In last 1 days**.

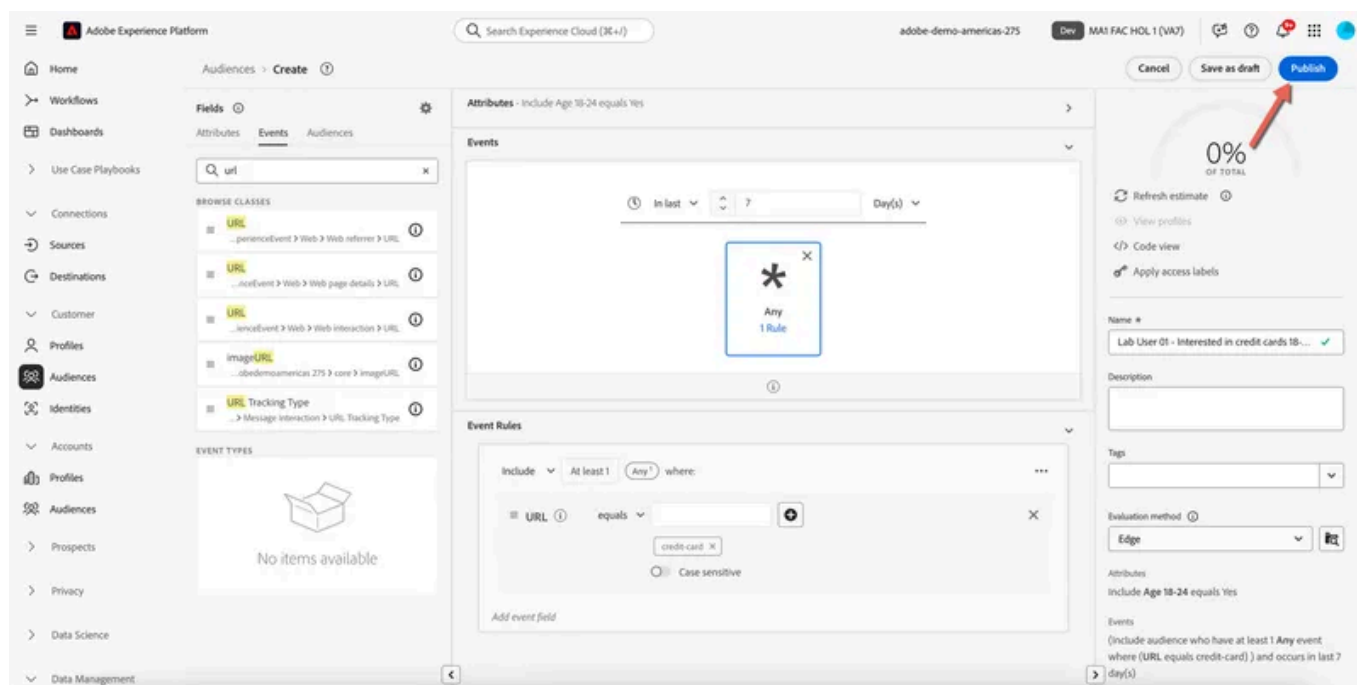


Lastly we need to give the audience a name and set the evaluation method. For the name prefix it with your lab user number or your name so you can easily recognise it later. Eg. **Lab User 01 / Olivia - Interested in Credit Cards 18-24.**

For the evaluation method, change this to **Edge**. This means the audience will qualify in real-time as the events are received into adobe's edge servers from the website.



Click on **Publish** to create the audience.



You've created an audience that can be used to personalize the experience on the website in real-time!

2.3 View a sequential audience

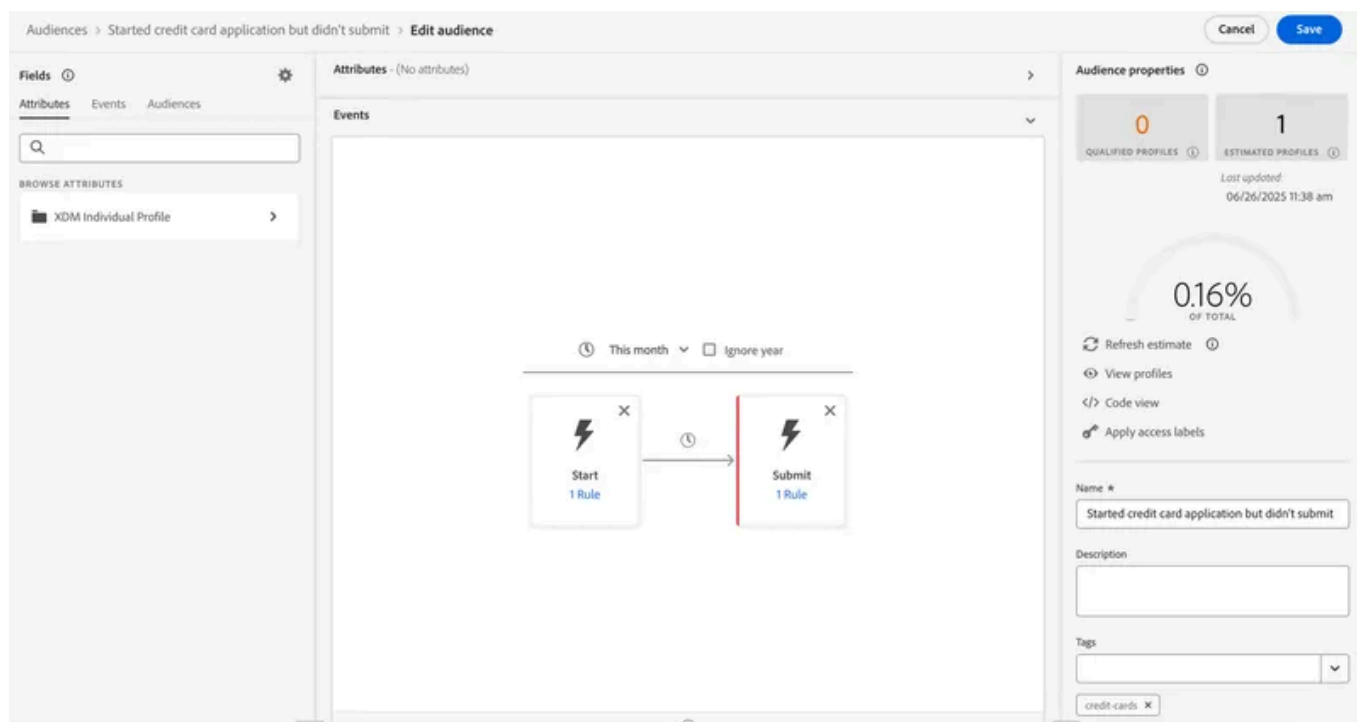
We also want to retarget customers on Social channels when they start the credit card application process but don't complete it, for this we can use Adobe's sequential segmentation logic which allows you to understand where customers are at within a specific process or journey.

From the **Audiences** → **Browse** screen, use the filter options to find Audiences tagged with "credit-cards". You can use tags to group audiences using keywords, this can, for example, help to identify which audiences belong to specific product groups or business units.

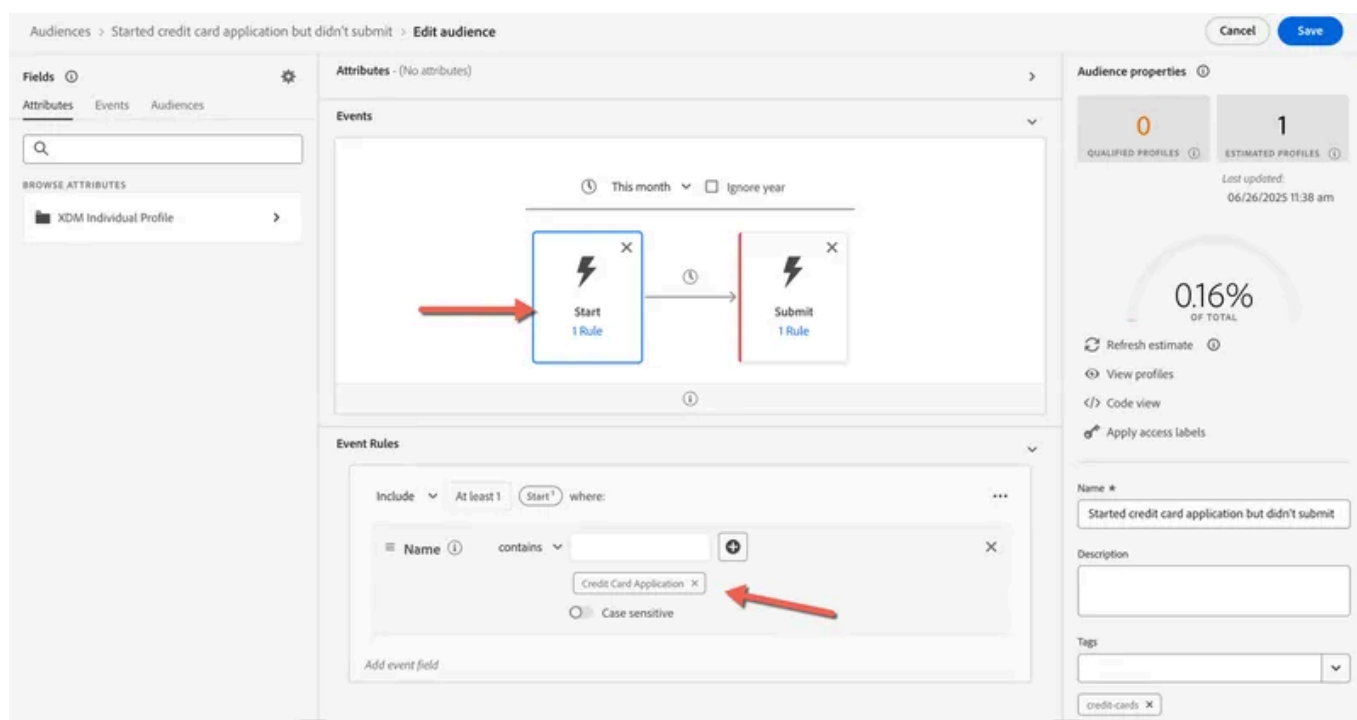
Click to open the **Started credit card application but didn't submit** audience.

In the overview screen you can see a description of the audience logic, the current audience count along with the destinations that the audience has been activated to.

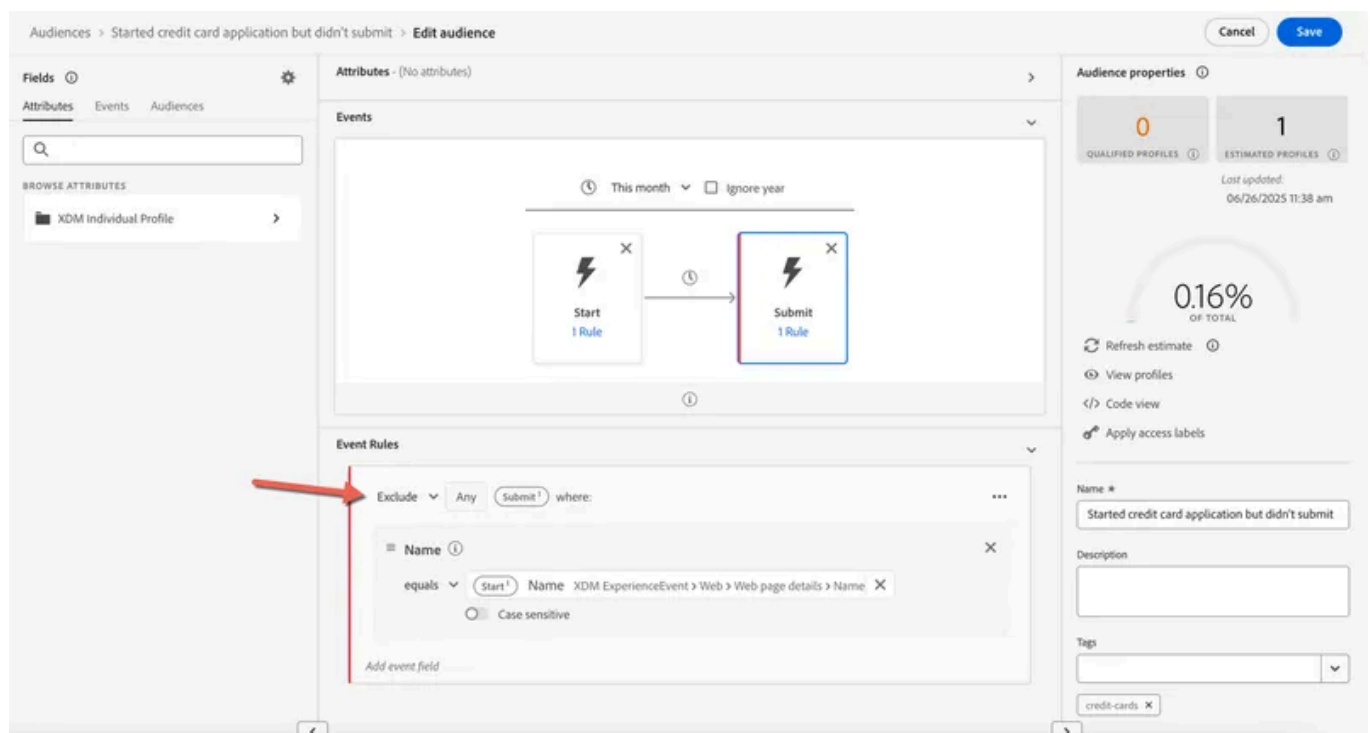
Click to **Edit audience**. In the audience builder you can see that two events have been chained together in a sequence, first the application start event followed by an application submit event.



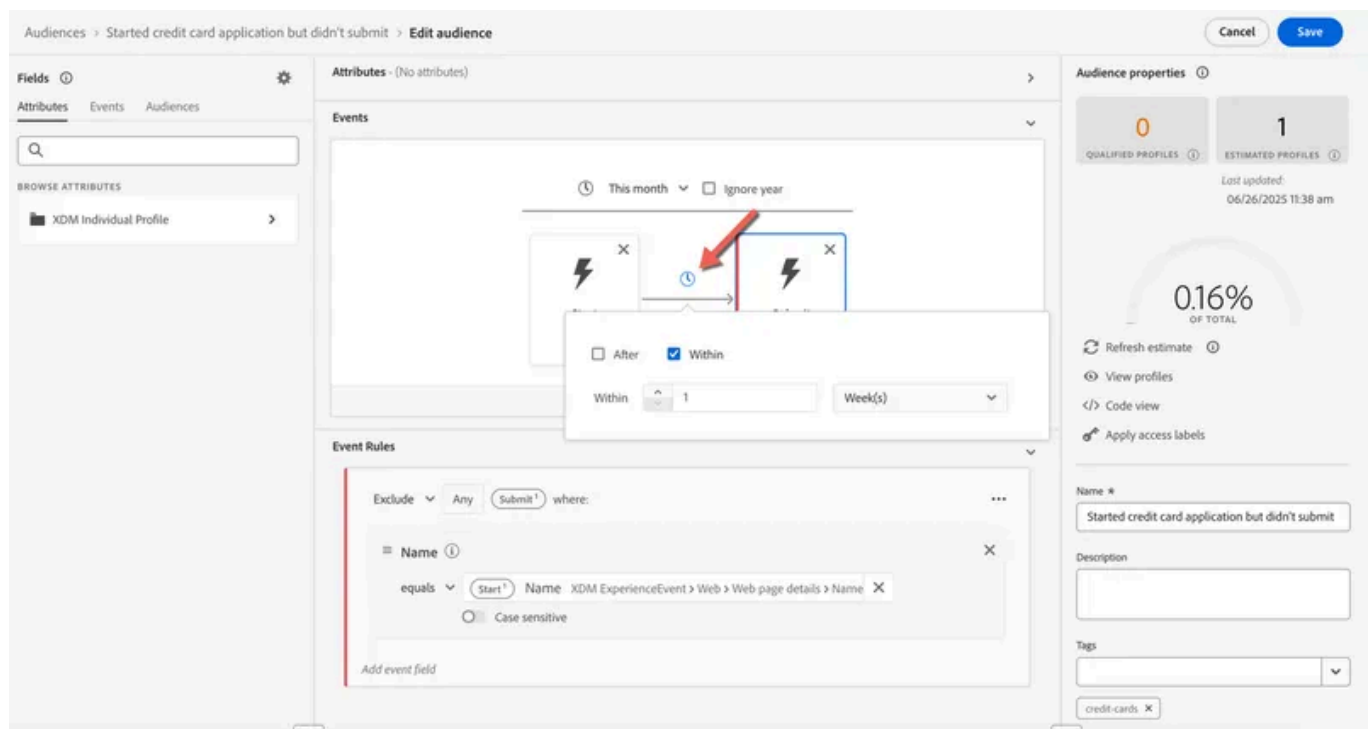
Click on the **Start** event to see the additional rules being applied to that event. Here we're filtering the application start to forms with **Credit Card Application** in the name.



Click on the **Submit** event. The red line shows that we are **excluding** this event, to find people who did NOT complete this action.



For this audience we've limited it to events that occurred in the last month, but you could go even further to restrict the length of time between events as well. Click the clock icon between the events to see the options.



With sequential processing power we can create complex segmentation that follows customer behaviours, this kind of logic often requires advanced SQL skills to create in more traditional marketing tools.

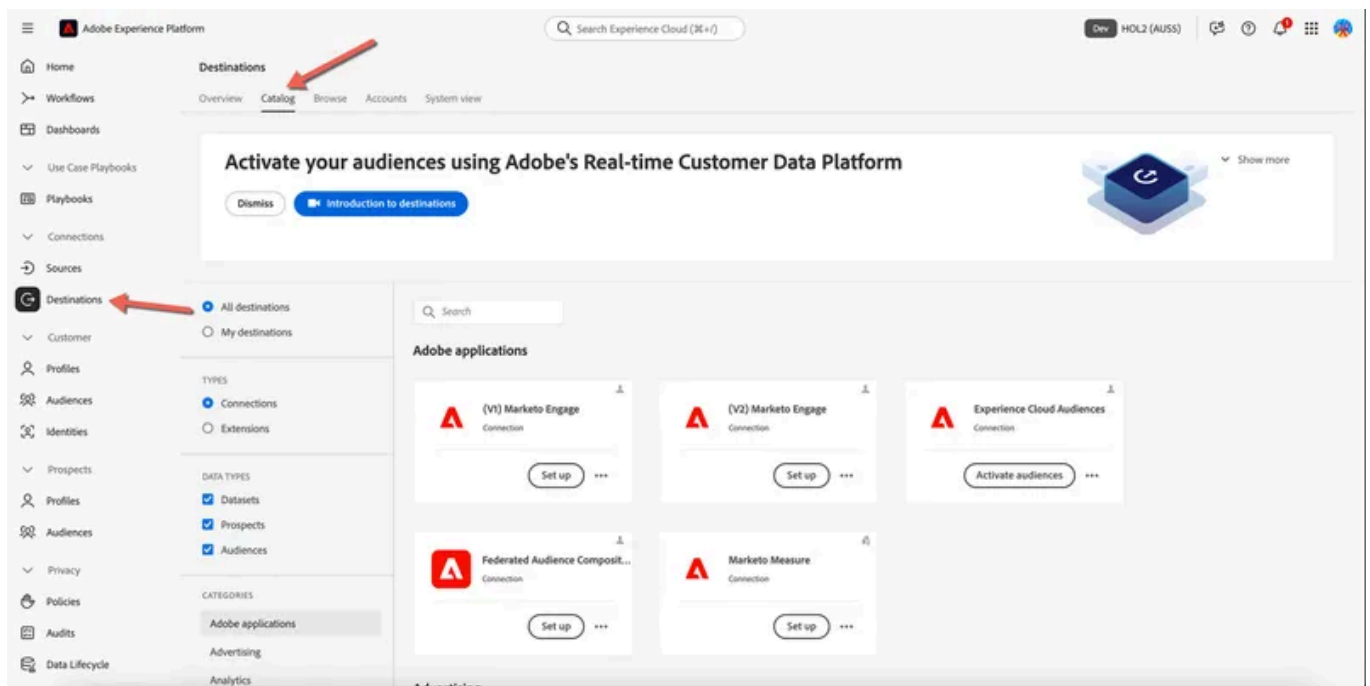
Click on **Cancel** to return to the Audiences screen.

You've seen a sequential audience that can be used to retarget consumers across paid, social and direct channels.

2.4 Activate audiences

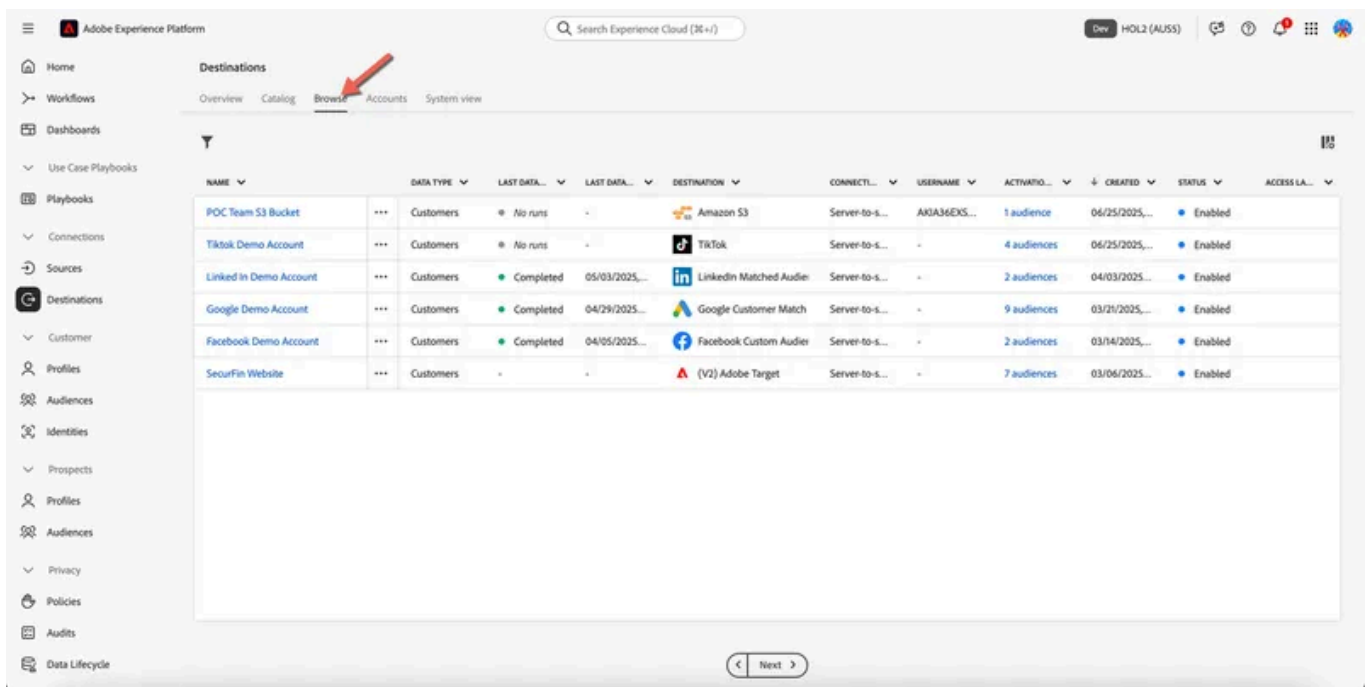
Once an audience is created, regardless of where the audience originates from we can activate them using RTCDP's Destination catalog.

Click on **Destinations** under the **Connections** menu on the left hand navigation, then move to the **Catalog** tab.



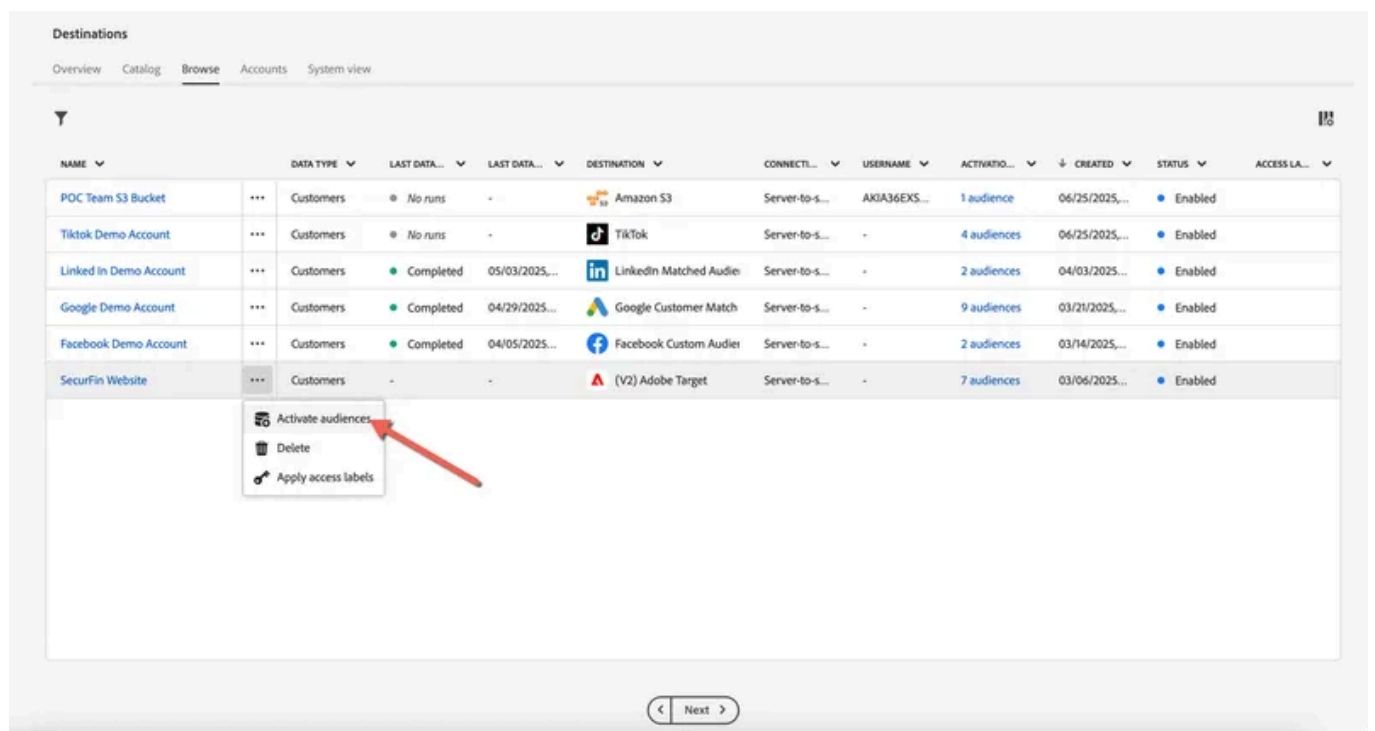
The catalog lists all of the available destination connectors, additional connectors can be created by partners using our Destination SDK. You can browse the list to see if the destinations your business uses are available.

Move now to the **Browse** tab, this shows the destination flows which have already been configured in this instance.



We want to use Adobe Target to personalize the landing page for customers coming from our paid media ads.

You can see Adobe Target is already connected. Click on the 3 dots next to the destination name and select to **Activate Audiences**.



Look for the audience you created in Step 2.2, and **select it** and click **Next**.

Destinations > **Activate destination** Cancel Next

Select audiences Mapping Review

Available audiences

Search: ol x

☒	NAME	ORIGIN	PROFILE COUNT
☐	SecurFinancial - Interested in consolidating finances	Segmentation service	0
☒	SecurFinancial - Interested in Gold Credit Card	Segmentation service	0
☐	Policy Renewal due in 2 weeks	Segmentation service	0
☐	Policy Purchased in last 7 days	Segmentation service	0
☒	Olivia - Interested in Credit Cards 18-24	Segmentation service	0
☐	Lead - Demographic - Children in Household	Segmentation service	0
☐	Has active home and car policy	Segmentation service	19
☐	Has Lapsed Car Policy	Segmentation service	26
☐	Has Active Car Policy	Segmentation service	63
☐	HOL Customer Profiles	Segmentation service	50

1 item selected Clear all

NAME

Olivia - Interested in Credit Cards 18-24 x

The mapping step allows you to share profile attributes from Adobe RTCDP to Adobe Target for personalisation within your Target experiences. This is optional though, there is no need to update anything on this screen, just click **Next**

Destinations > **Activate destination** Cancel Back Next

Select audiences Mapping Review

Mapping

Attribute selection is optional ⓘ
If no attributes are selected, segmentMembership and identityMap will still be shared.

Filter fields

Add new field

Review the activation details and click **Finish** to connect your audience with Adobe Target.

Destinations > Activate destination

Select audiences Mapping Review

Cancel Back Finish

Review

Connection

Destination name
SecurFin Website

Account
(V2) Adobe Target

Marketing Actions
Onsite personalization

Connected

Setup and audience

Selected audiences
8

Audiences added
1

Audiences selected

1-1 of 1

☒ New audiences
 ☐ Activated audiences
 [View applicable consent policies](#)

AUDIENCE NAME
Olivia - Interested in Credit Cards 18-24

In order to ensure consistency, destinations cannot be updated concurrently. If you encounter an error on the final step of the activation workflow this is likely the cause due to so many lab participants completing the same action, you can ignore this error or try the exercise again in a few moments.

Once your segment is successfully activated, click the product switcher to open Adobe Target.

Adobe Experience Platform

Search Experience Cloud (36+)

Dev HOL2 (AUSS)

Destinations > SecurFin Website

(V2) Adobe Target
8 Audiences - Last updated June 25, 2025 at 11:30 PM

1-8 of 8

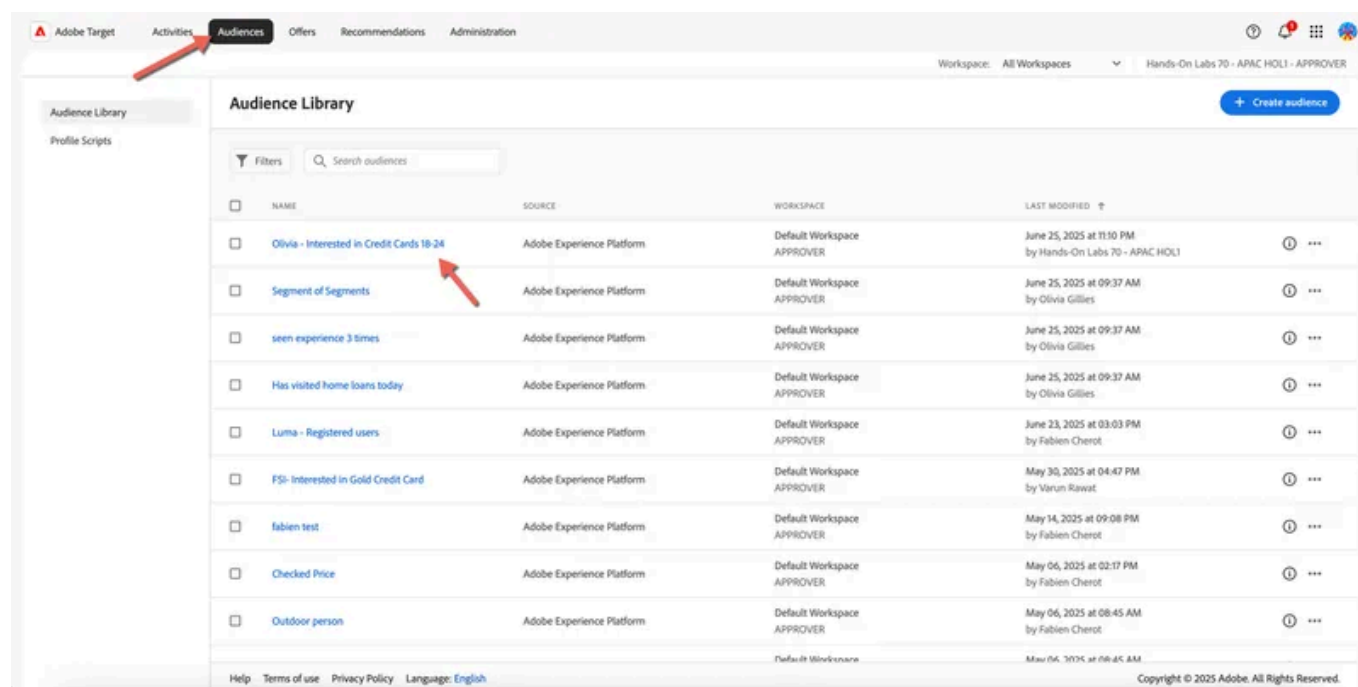
☐	AUDIENCE NAME	DATE ADDED	AUDIENCE DESCRIPTION
☐	Olivia - Interested in Credit Cards 18-24	06/25/2025	-
☐	SecurFinancial - Interested in Life Insurance	03/26/2025	-
☐	SecurFinancial - Interested in Vehicle Insurance	03/26/2025	-
☐	SecurFinancial - Interested in Health Insurance	03/26/2025	-
☐	SecurFinancial - Interested in Basic Credit Card	03/14/2025	-
☐	SecurFinancial - Interested in Gold Credit Card	03/14/2025	-
☐	SecurFinancial - Interested in Premium Credit Card	03/14/2025	-
☐	SecurFinancial - Interested in loans	03/05/2025	-

Destination has been successfully saved

Home
 App Builder Catalog
 Campaign
 Customer Journey Analytics
 Experience Manager Assets
 Experience Platform
 GenStudio
 Journey Optimizer
 People
 Target
 Assets
 Data Collection
 Exchange

Destination
 SecurFin Website
 (V2) Adobe Target
 Status
 Enabled
 Marketing actions
 Onsite personalization
 Labels
 Category
 Personalization
 Connection type
 Frequency

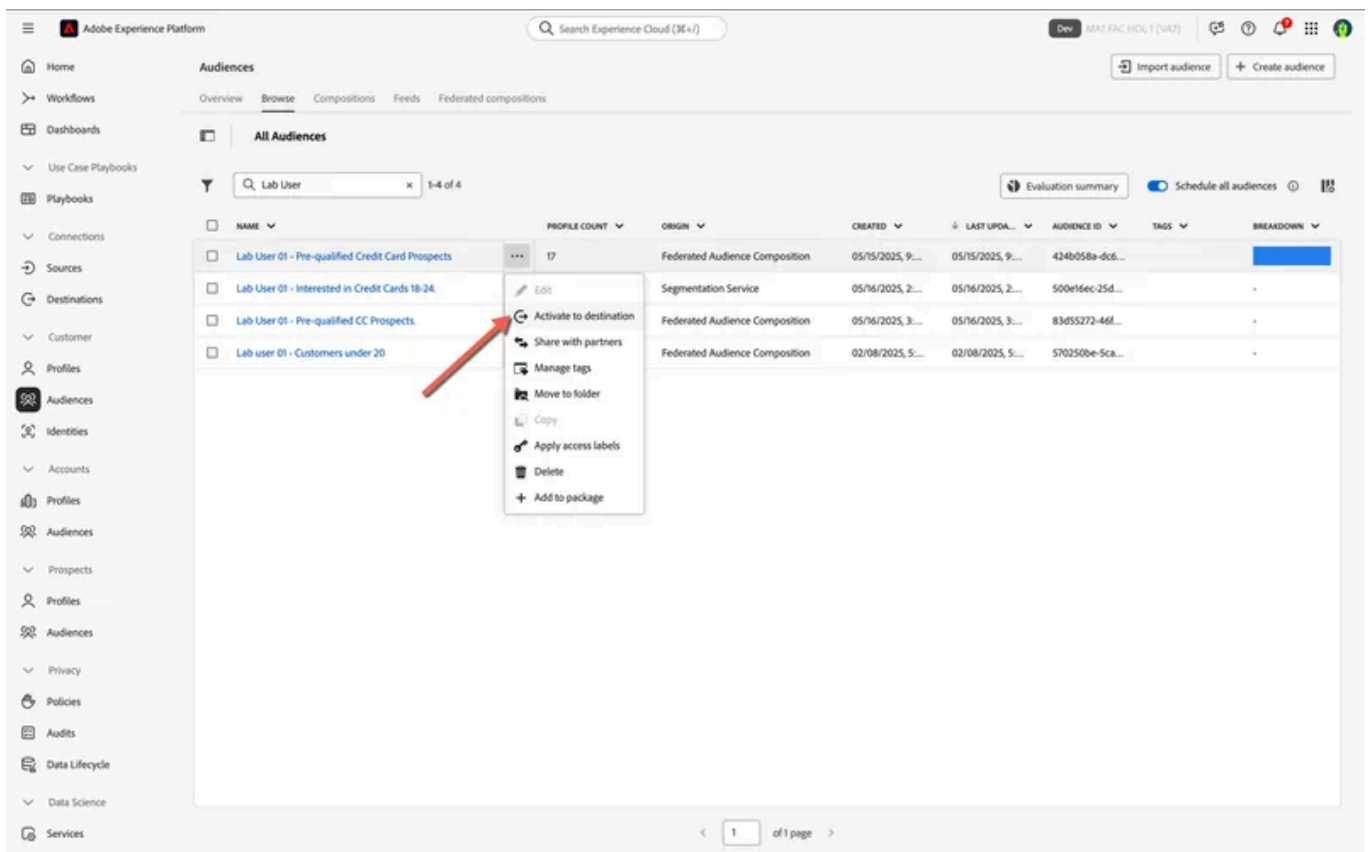
Switch to the **Audiences** tab in Target and filter to view **Adobe Experience Platform** audiences. You'll see your audience is available natively and ready to be used within a personalisation activity.



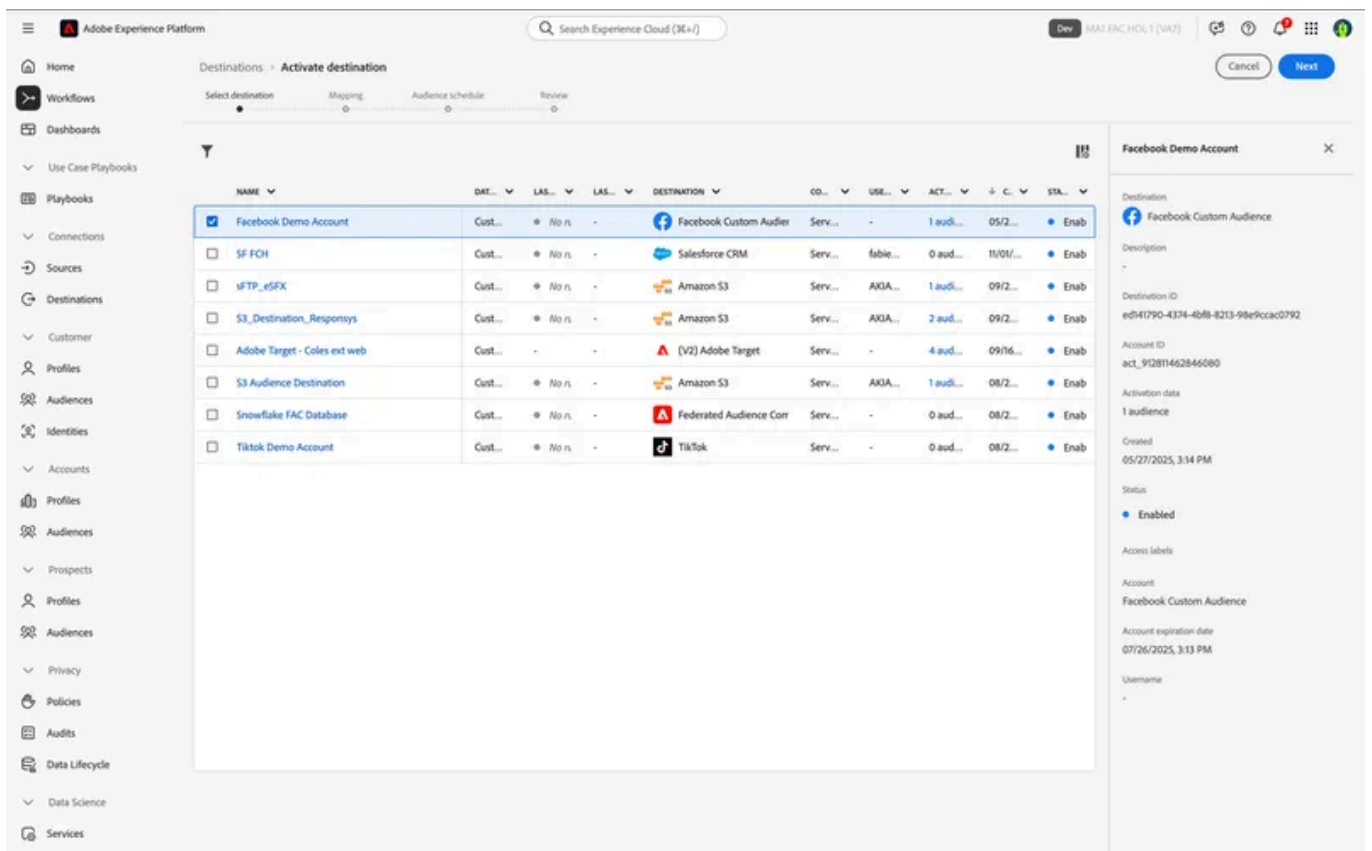
This completes the exercise on Activation since we've already activated the retargeting audience to Meta. If you want to see that flow you can read through the guide below, all of the destinations follow the same step by step wizard for activation.

Next we'll activate the **Retargeting Audience** to Meta.

Return to **Experience Platform** and navigate to **Audiences**. Find your audience and click on the 3 dots next to it. You have the option here to **Activate to destination**. This is a just a different way to initiate the activation flow.

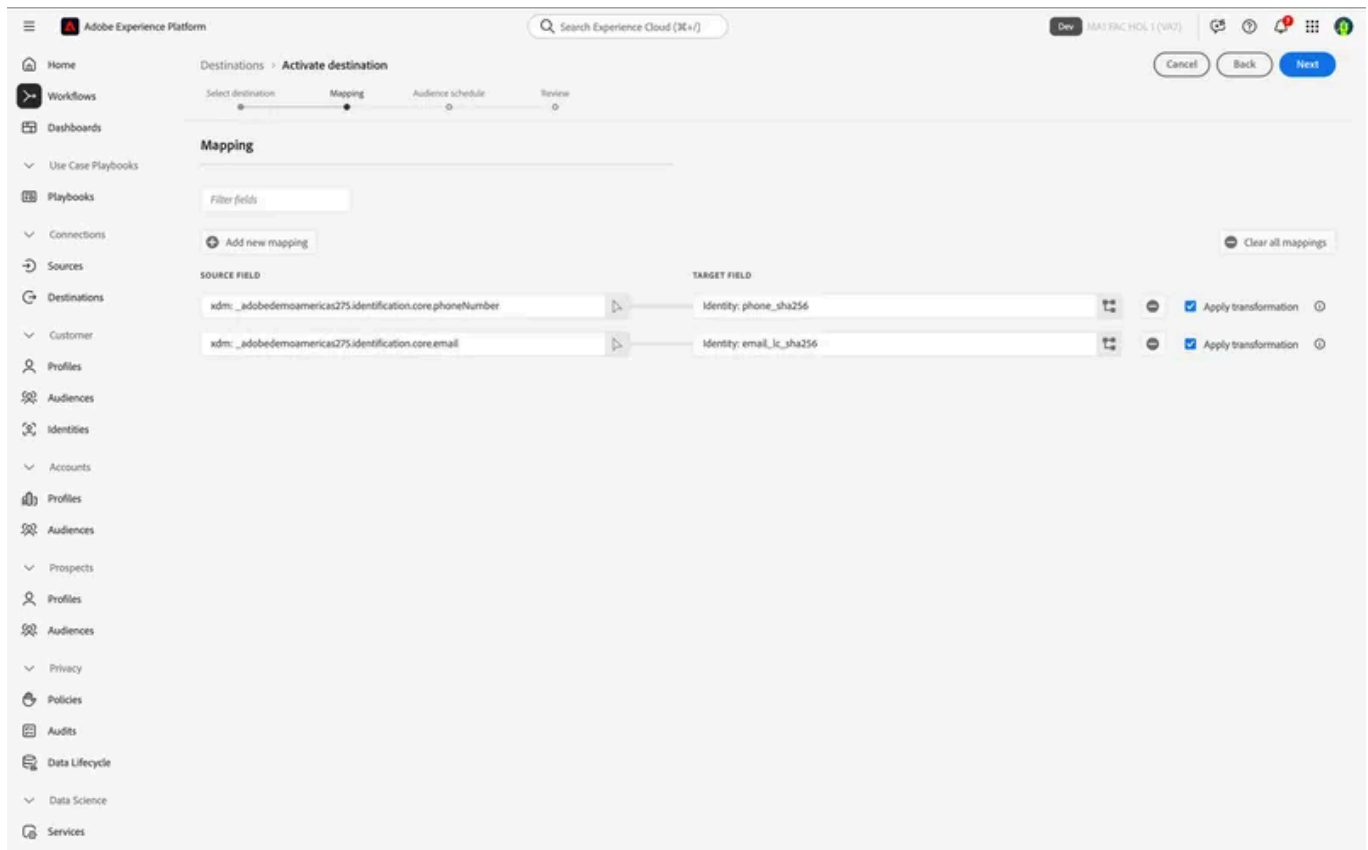


Select the **Facebook** destination and click **Next**



The mapping step controls how we reconcile profiles between Adobe and Meta. This is configured the first time you activate an audience and does not need to be updated each

time. We are reconciling on Hashed Email and Hashed Phone number for the best chance at matching. Click **Next**



There is one extra step that is required by Meta, and that is to declare whether the **Origin of audience** is first party coming directly from your customers or partner data or both. Select that the audience has come **directly from customers** and click **Next**

Adobe Experience Platform

Search Experience Cloud (36+)

Dev MAZ RBC HOL 1 (UAT)

Cancel Back Next

Destinations > Activate destination

Select destination Mapping Audience schedule Review

Audience schedule

Lab User 01 - Pre-qualified Credit Card Pr...

NAME	DESCRIPTION	START DATE	END DATE
Lab User 01 - Pre-qualified Credit Card Pr...		05/28/2025	No end date

Start date * 05/28/2025

End date No end date

Origin of audience * Choose date origin

- Directly from customers
- Customers and partners
- Directly from partners

Review the details of your activation and click **Finish** to create the equivalent audience within the facebook business account as a custom audience.

Adobe Experience Platform

Search Experience Cloud (36+)

Dev MAZ RBC HOL 1 (UAT)

Cancel Back Finish

Destinations > Activate destination

Select destination Mapping Audience schedule Review

Review

Connection

Destination name: Facebook Demo Account

Destination platform: Facebook Custom Audience

Account: Facebook Custom Audience

Marketing Actions: Cross-site targeting

Connected

Setup and audience

Selected audiences: 2

Audiences added: 1

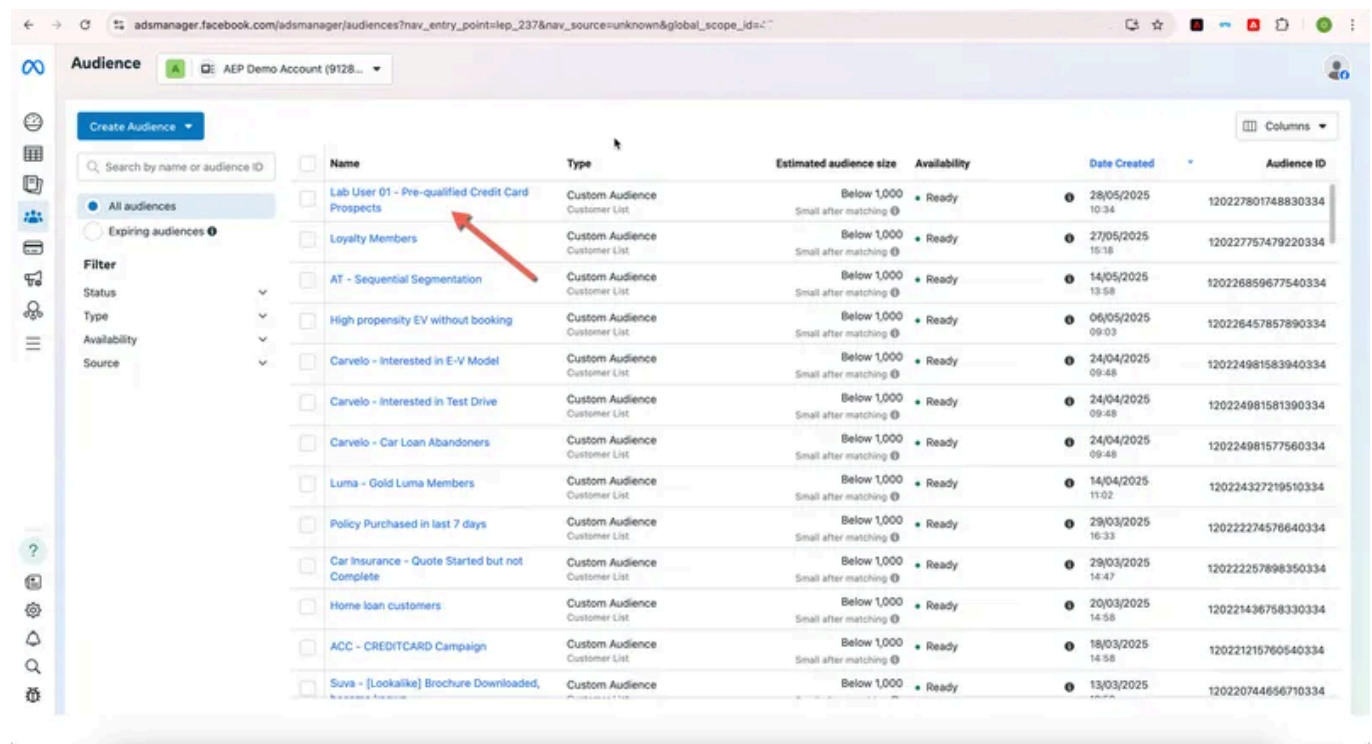
Audiences selected

1 of 1

New audiences Activated audiences View applicable consent policies

AUDIENCE NAME	SCHEDULING
Lab User 01 - Pre-qualified Credit Card Prospects	5/28/2025

Your audience will appear in Meta Ads Manager within their Audiences list. Data will start flowing into this audience in streaming fashion, starting with a backfill of existing profiles and then any new profiles as they qualify.



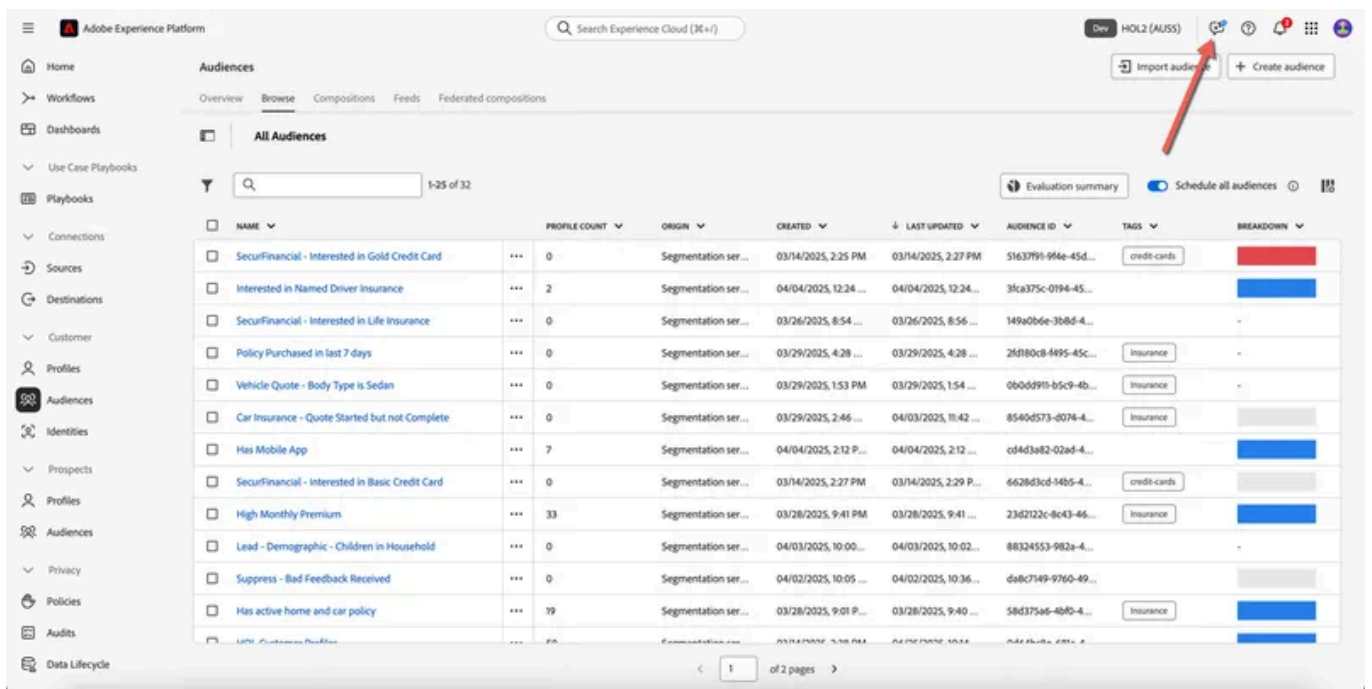
The screenshot shows the Meta Ads Manager interface for the 'AEP Demo Account (9128...)'. The 'Audience' section is active, displaying a list of custom audiences. A red arrow points to the first audience, 'Lab User 01 - Pre-qualified Credit Card Prospects'.

Name	Type	Estimated audience size	Availability	Date Created	Audience ID
Lab User 01 - Pre-qualified Credit Card Prospects	Custom Audience Customer List	Below 1,000 Small after matching	Ready	28/05/2025 10:34	120227801748830334
Loyalty Members	Custom Audience Customer List	Below 1,000 Small after matching	Ready	27/05/2025 15:18	120227757479220334
AT - Sequential Segmentation	Custom Audience Customer List	Below 1,000 Small after matching	Ready	14/05/2025 13:58	120226859677540334
High propensity EV without booking	Custom Audience Customer List	Below 1,000 Small after matching	Ready	06/05/2025 09:02	120226457857890334
Carvelo - Interested in E-V Model	Custom Audience Customer List	Below 1,000 Small after matching	Ready	24/04/2025 09:48	120224981583940334
Carvelo - Interested in Test Drive	Custom Audience Customer List	Below 1,000 Small after matching	Ready	24/04/2025 09:48	12022498158390334
Carvelo - Car Loan Abandoners	Custom Audience Customer List	Below 1,000 Small after matching	Ready	24/04/2025 09:48	120224981577560334
Luma - Gold Luma Members	Custom Audience Customer List	Below 1,000 Small after matching	Ready	14/04/2025 11:02	120224327219510334
Policy Purchased in last 7 days	Custom Audience Customer List	Below 1,000 Small after matching	Ready	26/03/2025 16:33	12022274576640334
Car Insurance - Quote Started but not Complete	Custom Audience Customer List	Below 1,000 Small after matching	Ready	29/03/2025 14:47	12022257898350334
Home loan customers	Custom Audience Customer List	Below 1,000 Small after matching	Ready	20/03/2025 14:58	120221436758330334
ACC - CREDITCARD Campaign	Custom Audience Customer List	Below 1,000 Small after matching	Ready	18/03/2025 14:58	120221215760540334
Suva - [Lookalike] Brochure Downloaded	Custom Audience	Below 1,000	Ready	13/03/2025	120220744656710334

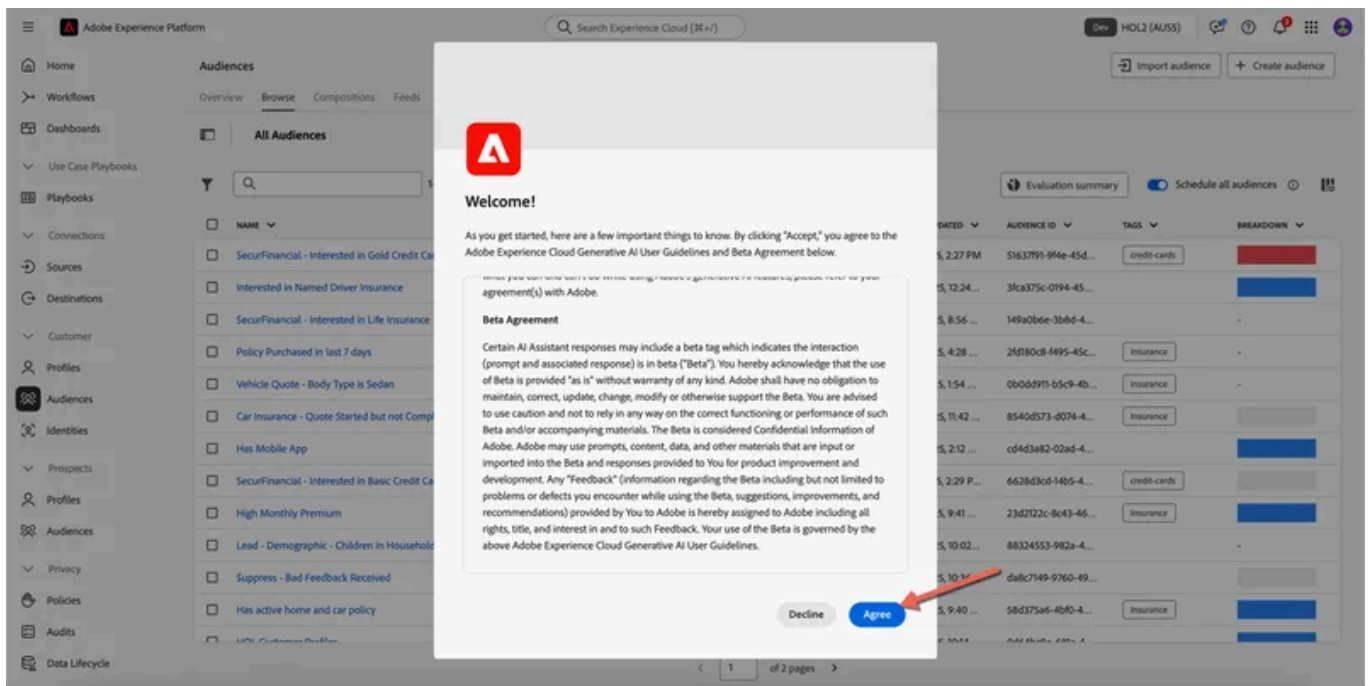
2.5 AI Assistant

In this exercise you'll discover how AI Assistant in Adobe Experience Platform can revolutionize your data analysis workflows and boost team productivity by streamlining complex tasks.

In Adobe Experience Platform, locate the AI Assistant panel on the right side of the screen.



If prompted, review and accept the Beta Agreement to enable AI Assistant.



Once enabled, AI Assistant will be available for use across Adobe Experience Platform and Platform-based apps like Adobe Journey Optimizer, Adobe Customer Journey Analytics, and Adobe Real-time Customer Data Platform.

Click on the lightbulb in the top right to open the discovery panel, here you'll find some suggestions for the types of prompts by category that AI Assistant can help you with.

Adobe Experience Platform

Search Experience Cloud (36+)

Audiences

Overview Browse Compositions Feeds Federated compositions

Import audience Create audience

All Audiences

1-25 of 32

Evaluation summary Schedule all audiences

NAME	PR	OR	CRE	L	AU	TAGS	BRE
SecurFinancial - Interested in Gold Credit Card	0	Seg...	03/14...	03/14...	51637...		
Interested in Named Driver Insurance	2	Seg...	04/10...	04/10...	3fca3...		
SecurFinancial - Interested in Life Insurance	0	Seg...	03/2...	03/2...	149a...		
Policy Purchased in last 7 days	0	Seg...	03/2...	03/2...	26d18...		
Vehicle Quote - Body Type is Sedan	0	Seg...	03/2...	03/2...	0b0d...		
Car Insurance - Quote Started but not Complete	0	Seg...	03/2...	04/10...	8540...		
Has Mobile App	7	Seg...	04/10...	04/10...	c04d...		
SecurFinancial - Interested in Basic Credit Card	0	Seg...	03/14...	03/14...	6628...		
High Monthly Premium	33	Seg...	03/2...	03/28...	23d2...		
Lead - Demographic - Children in Household	0	Seg...	04/10...	04/10...	8832...		
Suppress - Bad Feedback Received	0	Seg...	04/10...	04/10...	d48c...		
Has active home and car policy	19	Seg...	03/2...	03/28...	58d3...		
HOL Customer Profiles	50	Seg...	03/14...	06/2...	0d64...		

1 of 2 pages

AI Assistant

Let's get started

Get the information you need, right away. Ask a question or choose a suggested topic to get fast AI-generated answers based on data insights, product documentation, and more.

Ideas to get started

- What can AI Assistant help with?
- Which schemas are not used in any datasets?
- Calculate the percentage of activated audiences that are streaming.

Ask about Experience Platform

Suggest ideas

AI-generated responses may be inaccurate or misleading. Be sure to double-check responses and sources.

Navigate to **Pointed Learning** and click on the prompt: **How is the identity graph built.**

Adobe Experience Platform

Search Experience Cloud (36+)

Audiences

Overview Browse Compositions Feeds Federated compositions

Import audience Create audience

All Audiences

1-25 of 32

Evaluation summary Schedule all audiences

NAME	PR	OR	CRE	L	AU	TAGS	BRE
SecurFinancial - Interested in Gold Credit Card	0	Seg...	03/14...	03/14...	51637...		
Interested in Named Driver Insurance	2	Seg...	04/10...	04/10...	3fca3...		
SecurFinancial - Interested in Life Insurance	0	Seg...	03/2...	03/2...	149a...		
Policy Purchased in last 7 days	0	Seg...	03/2...	03/2...	26d18...		
Vehicle Quote - Body Type is Sedan	0	Seg...	03/2...	03/2...	0b0d...		
Car Insurance - Quote Started but not Complete	0	Seg...	03/2...	04/10...	8540...		
Has Mobile App	7	Seg...	04/10...	04/10...	c04d...		
SecurFinancial - Interested in Basic Credit Card	0	Seg...	03/14...	03/14...	6628...		
High Monthly Premium	33	Seg...	03/2...	03/28...	23d2...		
Lead - Demographic - Children in Household	0	Seg...	04/10...	04/10...	8832...		
Suppress - Bad Feedback Received	0	Seg...	04/10...	04/10...	d48c...		
Has active home and car policy	19	Seg...	03/2...	03/28...	58d3...		
HOL Customer Profiles	50	Seg...	03/14...	06/2...	0d64...		

1 of 2 pages

AI Assistant

Attributes - operational insights

Dataflows - operational insights

Datasets - operational insights

Destinations - operational insights

Journeys - operational insights

Schemas - operational insights

Sources - operational insights

Pointed Learning - product knowledge

- What can AI Assistant help with?
- How can you import an externally generated audience?
- What is the difference between Roles & User groups?
- What are the best uses for field groups vs data types?
- How is the identity graph built?**
- What best practices should I be aware of when enabling profiles in AEP?

Troubleshooting - product knowledge

The prompt will automatically populate in the text input box of AI Assistant, **press enter** to execute the query and view AI Assistant's response.

How is the identity graph built?

The identity graph is built through the Identity Service within Adobe Experience Platform. This service links various identities to create a comprehensive view of a single customer. Here's how the process generally works:

1. **Identity Collection:** The Identity Service collects different types of identity data, such as email addresses, phone numbers, and device identifiers. Each of these identities is categorized under specific identity namespaces (e.g., Email, Phone).
2. **Linking Identities:** The service establishes links between disparate identities that represent the same entity. For example, if a customer interacts with your brand using both an email address and a phone number, the Identity Service can create a link between these identities, indicating they belong to the same individual.
3. **Identity Graph Creation:** As identities are linked, they form an identity graph. This graph is a collection of all the identities associated with a single customer, allowing for a more unified view of customer interactions across different channels.
4. **Profile Merging:** The Real-Time Customer Profile service then merges profile fragments based on the identity graph, creating a comprehensive profile that includes attributes, behaviors, identities, and audience memberships.

This process enables businesses to understand their customers better and deliver personalized experiences based on a complete view of their interactions.

> Sources



Ask about Experience Platform



Suggest ideas



AI-generated responses may be inaccurate or misleading. Be sure to double-check responses and sources.

To verify the response provided you can review the **Sources** that are listed below the response.

number, the Identity Service can create a link between these identities, indicating they belong to the same individual. ⁴

3. **Identity Graph Creation:** As identities are linked, they form an identity graph. This graph is a collection of all the identities associated with a single customer, allowing for a more unified view of customer interactions across different channels. ¹

4. **Profile Merging:** The Real-Time Customer Profile service then merges profile fragments based on the identity graph, creating a comprehensive profile that includes attributes, behaviors, identities, and audience memberships. ³

This process enables businesses to understand their customers better and deliver personalized experiences based on a complete view of their interactions. ²

▼ Sources



1. [Identity Service Overview: Identity graphs](#)
2. [Identity Service Overview: What is Identity...](#)
3. [Identity Service Overview: Terminology terminology.](#)
4. [Identity Service Overview: How Identity Service...](#)

↪ How can I manage or update identities within the identity graph?

↪ What are the benefits of having a well-structured identity graph?

↪ Can you explain more about the types of identities that can be linked in the identity graph?

Ask about Experience Platform

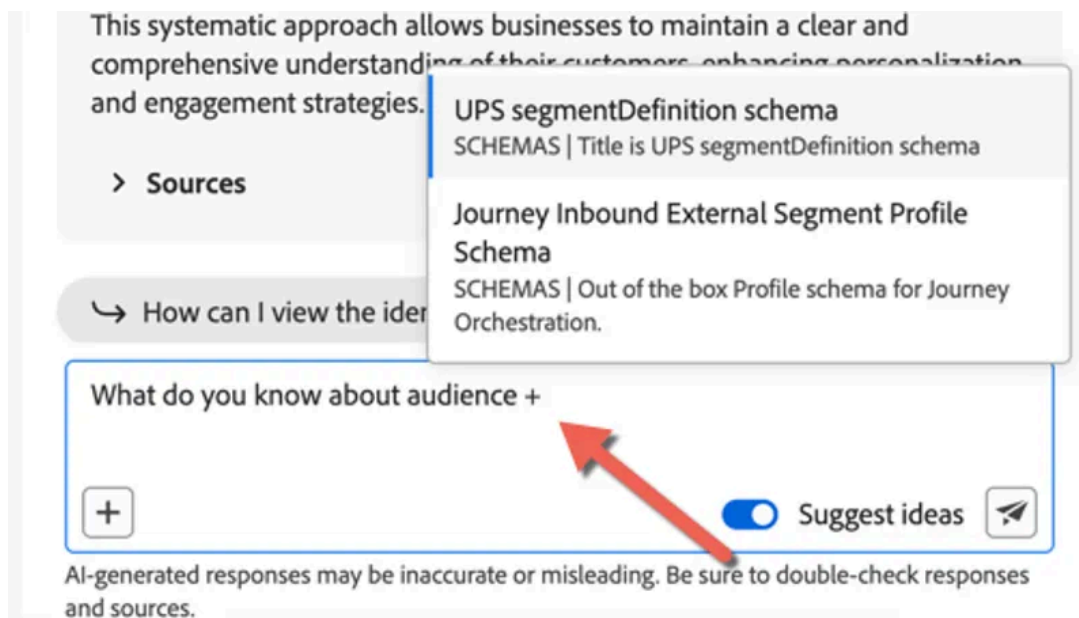


☒ Suggest ideas



AI-generated responses may be inaccurate or misleading. Be sure to double-check responses and sources.

AI Assistant is also able to help with Operational Insights based on what is configured within your sandbox. In the AI Assistant input field, begin typing **"What do you know about audience +"**, the + will open the object selector.



Start typing **Has** and you'll see the objects list update as you type. Select **Has Active Car Policy** audience from the drop down.

AI Assistant

'Has Active Car Policy' (case-insensitive) **Today** to LOWER operation).

- In the final step, sort the results by audience name and forecast date.

> Source

↪ What are the merge policies of audiences that have size greater than [number]?

↪ What is the highest value of size in audiences which are not streaming?

↪ What is the number of activated audiences which have size more than [number]?

What questions do you have today?

Continue asking questions to get feedback, product documentation, and more.

Example requests

↪ What can AI Assistant help with?

↪ Can I delete a profile enabled for [name]?

↪ Show me all fields containing [text] when the schema was created.

Refresh

Has Mobile App AUDIENCES

Has Lapsed Car Policy AUDIENCES

Has Active Car Policy AUDIENCES

Has active home and car policy AUDIENCES

Edge Network flow from datastream gillies - Bajaj Allianz (web) to dataset 67bdaf3ac09d222ab7631f5d
SOURCES · FLOWS | AEP Edge Network data collection flow with source datastream gillies - Bajaj Allianz (web) and dataset 67bdaf3ac09d222ab7631f5d

What do you know about audience +Has Ac?

+

☒ Suggest ideas

AI-generated responses may be inaccurate or misleading. Be sure to double-check responses and sources.

Once AI Assistant provides a response, take note of the structured output, which consists of three key sections:

- Actual response and data – The primary insights retrieved from Adobe Experience Platform.
- How AI Assistant interpreted your question – Explanation of AI Assistant's reasoning.
- How the answer was derived – The logic and steps behind the response.

Part 1 of the response contains the information requested

Part 2 of the response shows how AI Assistant understood your query

Part 3 of the response showcases the series of steps AI Assistant took to arrive at the answer.

AI Assistant

Refresh

Today

What do you know about audience Has Active Car Policy?

The audience named 'Has Active Car Policy' has a total of 63 [profiles](#). It is classified as a batch audience and is not streaming. There are no other [audiences](#) that share the same definition, and it is not used in any other audience.

Based on your question, here is the crafted query:

The query aims to gather details about the audience named 'Has Active Car Policy', including its total profiles, classification as a batch or streaming audience, and counts of duplicate definitions and usage in other audiences.

Here is how the results are obtained:

- First, examine the list of all audiences to find the one named 'Has Active Car Policy'.
- Then, retrieve details such as the total number of profiles, whether it is a batch or streaming audience, and the last updated time.
- Next, check for any other audiences that have the same definition and count them.
- Additionally, determine if this audience is used in any other audience and count those instances.
- In the final step, compile all this information into a single output.
- 1 out of 1 total results are shown.

> Source

👍

🗨️

⬇️

Ask about Experience Platform

+

Suggest ideas

📧

AI-generated responses may be inaccurate or misleading. Be sure to double-check responses and sources.

Click on “**Show Source**” within AI Assistant’s response. Select “**View Source Query**” to open the SQL query that was used to retrieve the response. Here you can review the query, which includes comments explaining each step, to verify how AI Assistant arrived at its answer.

The screenshot displays the Adobe Experience Platform (AEP) interface. On the left, a sidebar contains navigation links for Home, Workflows, Dashboards, Use Case Playbooks, Connections, Sources, Destinations, Customer, Profiles, Audiences, Identities, Prospects, Privacy, Data Science, Data management, Schemas, Places, and Datasets. The main area is titled 'Audiences' and shows a list of audience segments. A 'Source query' window is open in the center, displaying a SQL query. On the right, the 'AI Assistant' panel is visible, providing a detailed explanation of the query and a list of related questions.

Source query

```

1 SELECT
2   s.audienceId AS audienceId, /* select the audience
3   s.name AS audienceName, /* select the audience name
4   s.totalProfiles, /* select the total number of profiles
5   s.isBatch, /* select whether the audience is a batch
6   s.isStreaming, /* select whether the audience is a streaming audience
7   s.updatedTime, /* select the last updated time of the audience
8   COUNT(ss.dependentAudienceId) AS usedInOtherAudiences, /*
9   COUNT(ss.definition) AS duplicateAudienceCount, /*
10  FROM hkg_dim_audience AS s /* from the audience information table
11  LEFT JOIN hkg_dim_audience AS s1 /* left join with the audience information table
12    ON s.definition = s1.definition /* match on the definition
13    AND s.audienceId <> s1.audienceId /* ensure it does not match itself
14  LEFT JOIN hkg_br_base_audience_used_by_dependent_audience AS ss
15    ON s.audienceId = ss.audienceId /* match on the audience ID
16  WHERE
17    LOWER(s.name) LIKE LOWER('Has Active Car Policy')
18  GROUP BY
19    s.audienceId, /* group by audience ID */
20    s.name, /* group by audience name */
21    s.totalProfiles, /* group by total profiles */
22    s.isBatch, /* group by batch status */
23    s.isStreaming, /* group by streaming status */
24    s.updatedTime /* group by last updated time */
25  LIMIT 1 /* limit the output to 1 row */

```

This read-only SQL verifies AI Assistant responses. It isn't supported as a query on Query Service.

AI Assistant

Based on your question, here is the crafted query:

The query aims to gather details about the audience named 'Has Active Car Policy', including its total profiles, classification as a batch or streaming audience, and counts of duplicate definitions and usage in other audiences.

Here is how the results are obtained:

- First, examine the list of all audiences to find the one named 'Has Active Car Policy'.
- Then, retrieve details such as the total number of profiles, whether it is a batch or streaming audience, and the last updated time.
- Next, check for any other audiences that have the same definition and count them.
- Additionally, determine if this audience is used in any other audience and count those instances.
- In the final step, compile all this information into a single output.
- 1 out of 1 total results are shown.

Source

[View source query](#)

Can you provide the various unique merge policies in activated audiences?

Which audiences do not associate with active journeys?

Ask about Experience Platform

[+](#) [Suggest Ideas](#)

AI generated responses may be inaccurate or misleading. Be sure to double-check responses and sources.

We can use AI Assistant to understand the overlap between audiences. Ask AI Assistant:

What is the profile overlap between audience "Has Lapsed Car Policy" and "Has Mobile App"?

AI Assistant

journeys?

Today

What is the profile overlap between audience "Has Lapsed Car Policy" and "Has Mobile App"?

Table

Download

Fullscreen

AUDIENCE	COUNT	PCT_OVERLAP
Overlap	1	None
Has Lapsed Car Po...	26	3.85
Has Mobile App	6	16.67

Based on your question, here is the crafted query:

The query aims to determine the profile overlap between the [audiences](#) "Has Lapsed Car Policy" and "Has Mobile App," providing counts of [profiles](#) in each audience and the overlap between them.

Here is how the results are obtained:

- First, examine the collection of customer profiles to gather information about their audience memberships.
- Count the number of profiles that belong to the audience "Has Lapsed Car Policy" with a status of 'realized'.
- Count the number of profiles that belong to the audience "Has Mobile App" with a status of 'realized'.

Ask about Experience Platform

+

Suggest ideas

Send

AI-generated responses may be inaccurate or misleading. Be sure to double-check responses and sources.

Here's how to interpret these values. 3.85% of Has Lapsed Car Policy audience has an overlap with 16.67% of Has Mobile App. The total number of profiles common between both of them is 1.

We can now start to use AI Assistant for audience discovery, for example we can check data distribution of profiles. Ask AI Assistant: **What are the top 5 cities where my profiles live?**

What are the top 5 cities where my profiles live?

Table



CITY_COUNT	CITY
110	"Sadar Bazar"
90	"R S"
31	"Sydney"
22	"Kolkata"
21	"Melbourne"

Based on your question, here is the crafted query:

This query aims to identify the top 25 cities where [profiles](#) reside, counting the number of profiles in each city while excluding any entries where the city information is missing.

Here is how the results are obtained:

- First, examine the collection that contains detailed information about customer profiles.
- Filter out any profiles that do not have a specified city in their home address.
- Next, group the remaining profiles by the city they reside in.



Ask about Experience Platform



Suggest ideas



AI-generated responses may be inaccurate or misleading. Be sure to double-check responses and sources.

Now ask AI Assistant: **How many profiles live in Sydney are over 35 and have an email address?**

How many profiles live in Sydney are over 35 and have an email address?

There are 30 [profiles](#) living in Sydney who are over 35 years old and have an email address.

Based on your question, here is the crafted query:

The query counts the number of profiles that reside in Sydney, are aged over 35, and possess an email address.

Here is how the results are obtained:

- First, examine the collection of profiles that contains detailed information about each individual.
- Next, filter this collection to include only those profiles where the city in the home address is "Sydney".
- Then, further narrow down the profiles to those who are in the age groups of 35-44, 45-54, 55-64, or 65 and above.
- Finally, ensure that the profiles have a non-null email address.

> Source



↪ How many audiences that have time-to-live at most [number#1] days and profile count at most [number#2] are there?

↪ How many datasets have no corresponding profile enabled schemas?



Ask about Experience Platform



☒ Suggest ideas



AI-generated responses may be inaccurate or misleading. Be sure to double-check responses and sources.

We hope you've enjoyed this sneak peak into some of the profile and audience analysis capabilities coming to AI Assistant in the near future!

Summary

Congratulations, you've completed the Introduction to Adobe Experience Platform exercise!

You have successfully:

1. Used the fast moving data that's been ingested into Adobe Experience platform to create a real-time segment
2. Viewed how we can create complex audiences using sequential segmentation to understand where a customer is within a series of actions.
3. Activated an audience to Adobe Target for on-site personalisation and optimisation use cases and seen how we can activate audiences to Meta using hashed first party identifiers.
4. Leveraged AI Assistant to help discover and validate audiences. Helping you make faster, data-driven marketing decisions with ease.

If you still have time available, try the Journeys and Content exercise next!

3. Lab 2 - Journeys and Content

Learning Objectives

In this exercise you will:

1. Understand types of journey triggers
2. Design a multi-step journey
3. Generate brand aligned content using AI
4. Use experimentation to optimise content

Scenario

WKND is a fictional adventure apparel brand with a paid subscription service for avid adventurers. WKND have built rich, real-time customer segments using Adobe Experience Platform. Now, the marketing team wants to **orchestrate personalised, cross-channel journeys** that respond to customer behavior in real time.

This lab will guide participants through designing and launching a **trigger-based journey** using Adobe Journey Optimizer.

Journey: "Nurture Journey"

Trigger: Customer visits the website and starts a signup process but doesn't complete it.

Journey Flow:

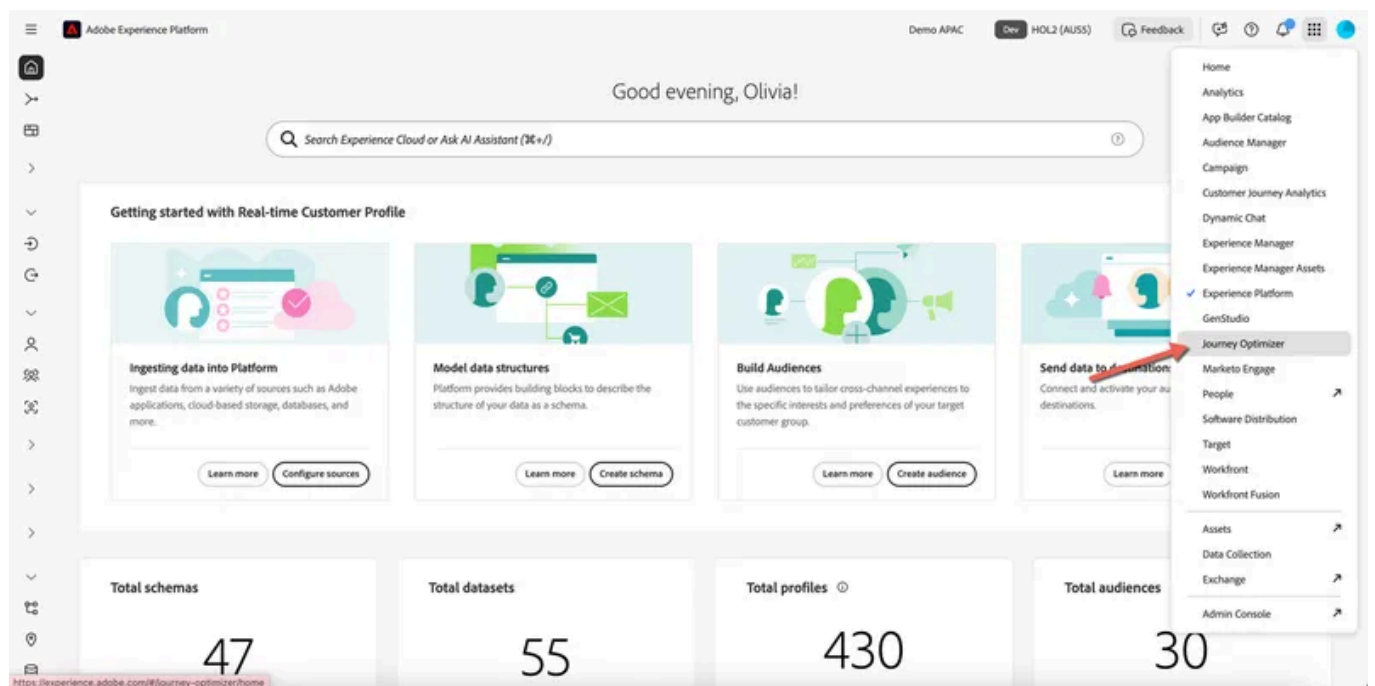
1. **Day 0:** Send personalised email with multiple variants
2. **Day 2:** If no engagement, send an SMS or Push notification to re-engage.
3. **Exit:** If customer completes the process at any time

Access

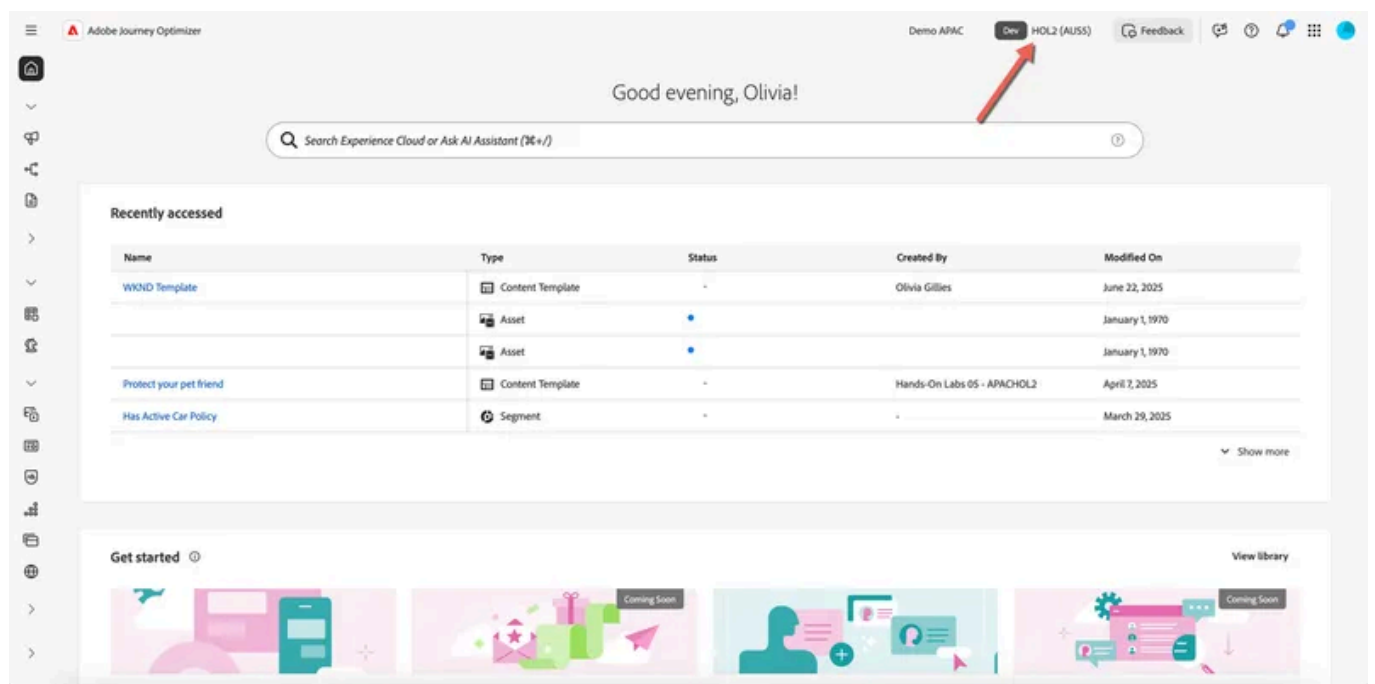
Your login credentials should be available on your desk including your lab participant number.

Login via <https://platform.adobe.com>

Once authenticated switch to **Adobe Journey Optimizer** using the solution switcher:



Before you get started please confirm that you are in the right sandbox - it should be **HOL2 (AUS5)**



2.1 Navigation Overview

Let's first take a quick look through the menu options on the left hand side.

Journey Management is where you will find your Campaigns, Journeys and global Reporting. Campaigns are single channel bulk or recurring messages, while journeys are multi-step and multi-channel.

Use Case Playbooks provide a catalog of use cases to get you started faster.

Decisioning is where you'll find the next best offer catalog and strategies.

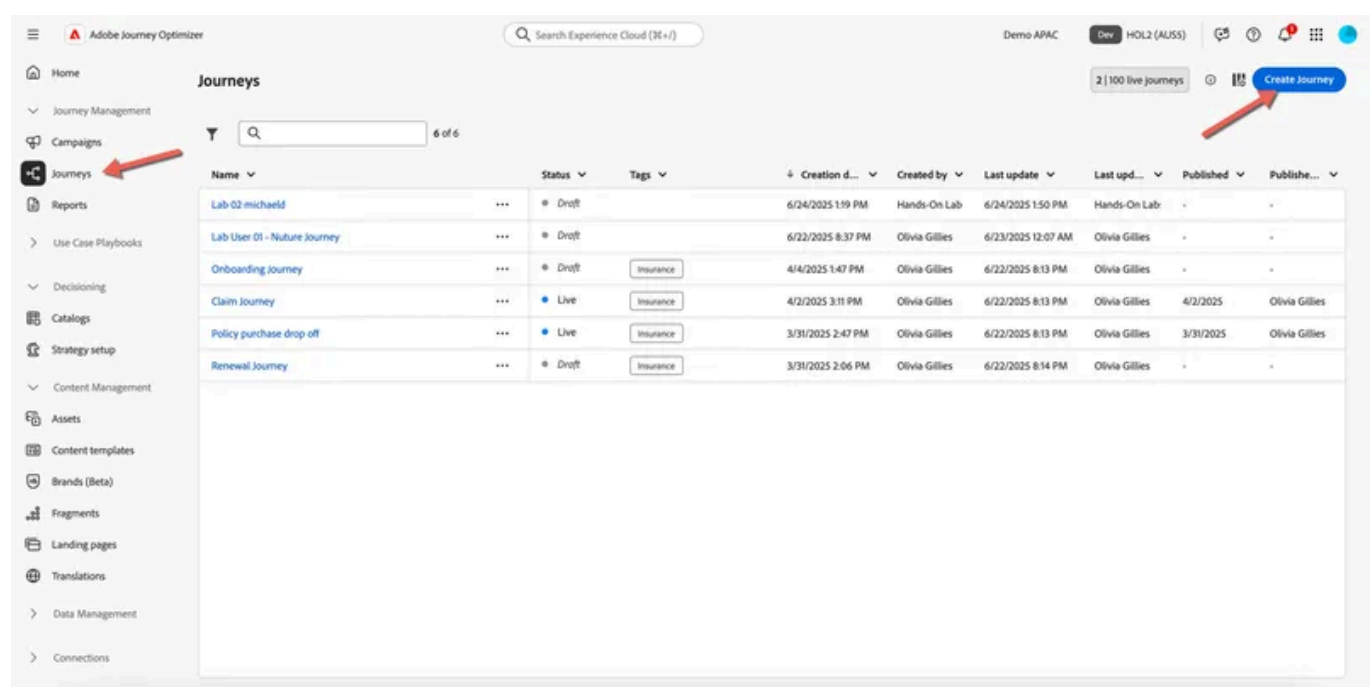
Content Management is where you'll manage all of your content, including your Asset Repository powered by Adobe Experience Manager **Assets**, re-usable multi-channel **Content Templates**, HTML and Expression **Fragments**, **Landing pages** and **Translations** for multi-lingual support. You'll also find your **Brand** guidelines here used to ensure all content is brand aligned (BETA feature).

Data Management, **Connections** and **Customer** is where you can access the same shared components as RT-CDP. The Unified Profile and Audience definitions are part of the core Adobe Experience Platform and are shared by both solutions which helps to reduce duplication and create consistent experiences across channels.

Administration is where you will find configuration items for journey triggers, custom actions, channels and business rules to control channel based frequency capping.

2.2 Create Journey

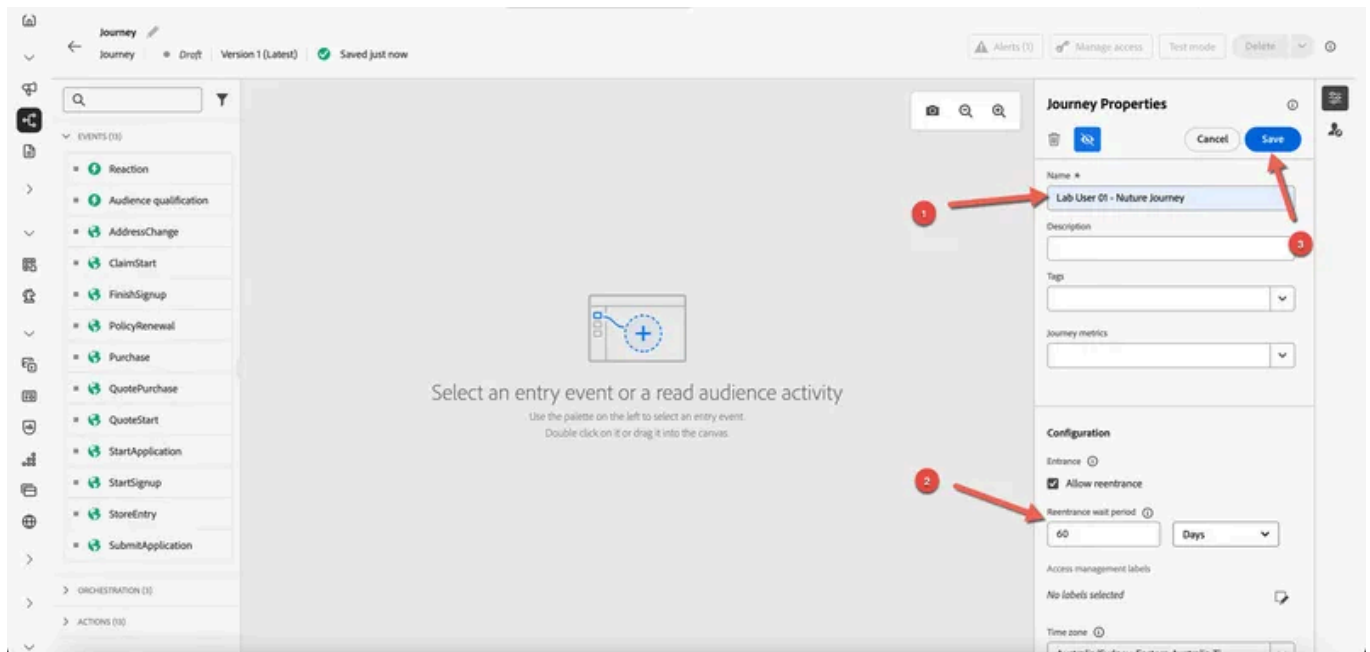
Navigate to **Journey Management** → **Journeys** and click on **Create Journey**.



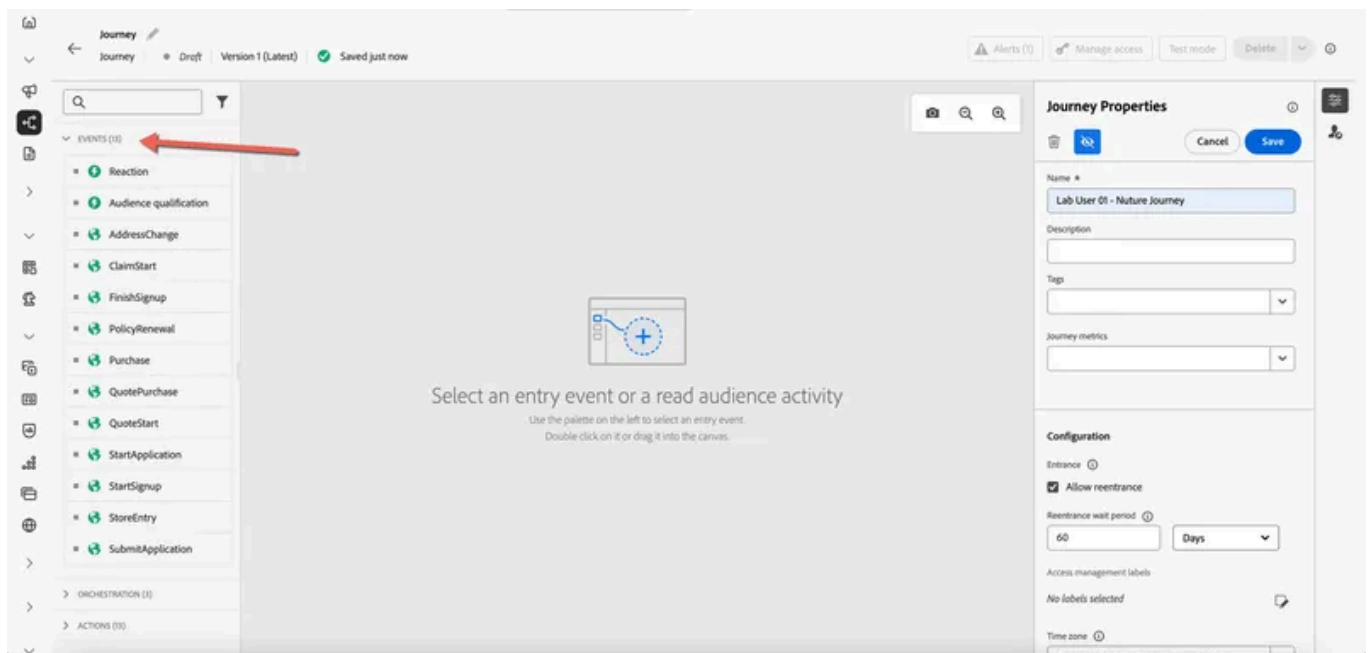
The screenshot displays the Adobe Journey Optimizer interface. On the left sidebar, the 'Journeys' option is highlighted with a red arrow. The main content area shows a table of existing journeys. A red arrow points to the 'Create Journey' button in the top right corner of the interface.

Name	Status	Tags	Creation d...	Created by	Last update	Last upd...	Published	Publishe...
Lab 02 michaeld	✱ Draft		6/24/2025 1:19 PM	Hands-On Lab	6/24/2025 1:50 PM	Hands-On Lab	-	-
Lab User 01 - Nature Journey	✱ Draft		6/22/2025 8:37 PM	Olivia Gillies	6/23/2025 12:07 AM	Olivia Gillies	-	-
Onboarding Journey	✱ Draft	Insurance	4/4/2025 1:47 PM	Olivia Gillies	6/22/2025 8:13 PM	Olivia Gillies	-	-
Claim Journey	● Live	Insurance	4/2/2025 3:11 PM	Olivia Gillies	6/22/2025 8:13 PM	Olivia Gillies	4/2/2025	Olivia Gillies
Policy purchase drop off	● Live	Insurance	3/31/2025 2:47 PM	Olivia Gillies	6/22/2025 8:13 PM	Olivia Gillies	3/31/2025	Olivia Gillies
Renewal Journey	✱ Draft	Insurance	3/31/2025 2:06 PM	Olivia Gillies	6/22/2025 8:14 PM	Olivia Gillies	-	-

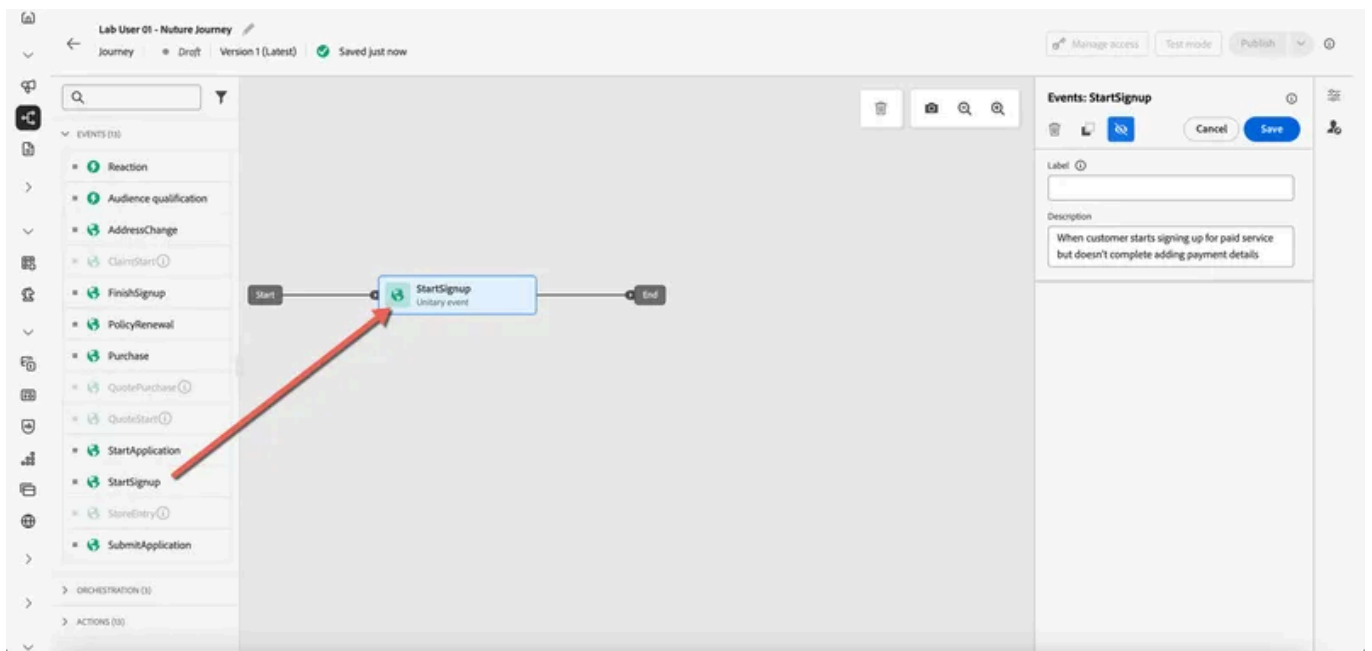
Give your journey a **name**, add your lab user number or name so you can recognise it from other lab participants. The journey properties are also where you can set up the re-entrance criteria, set re-entry wait period to every **60 days**. Click **Save**.



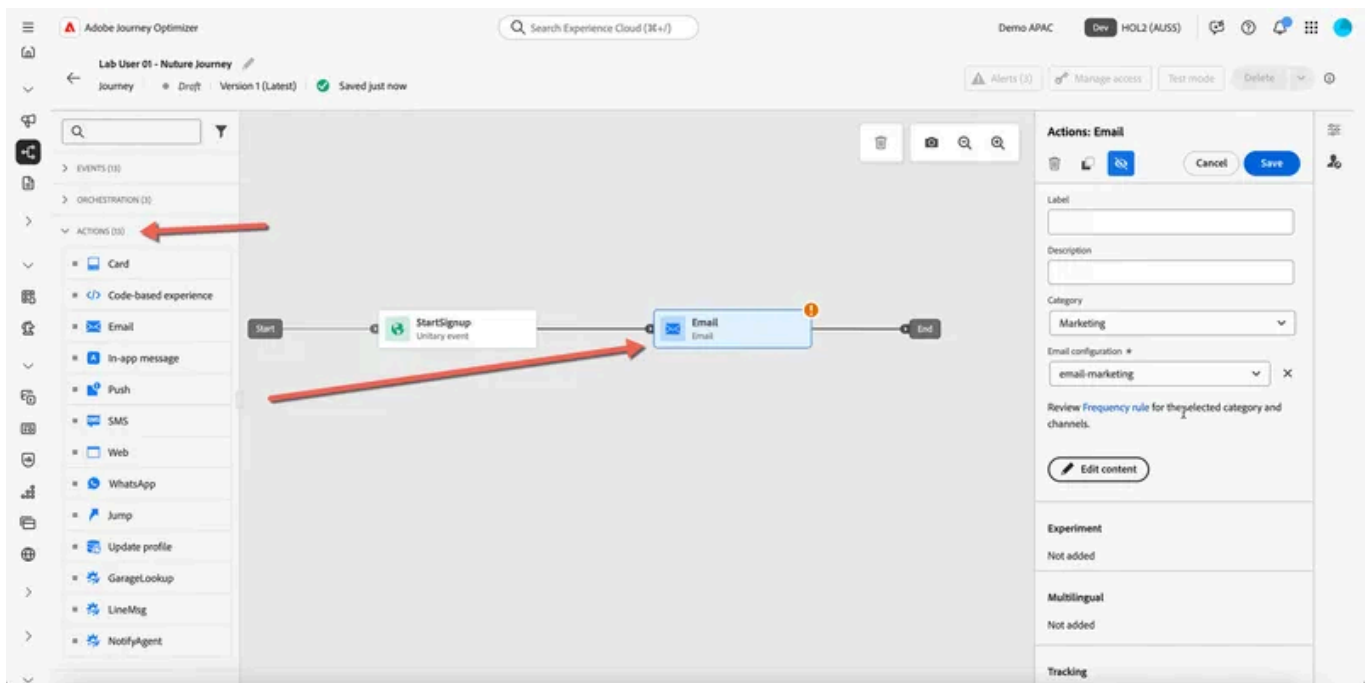
Journeys can be triggered from individual events or when a customer enters or exits a segment. You can see the events that are configured as journey triggers in the left panel - this list is configurable and will depend on your implementation.



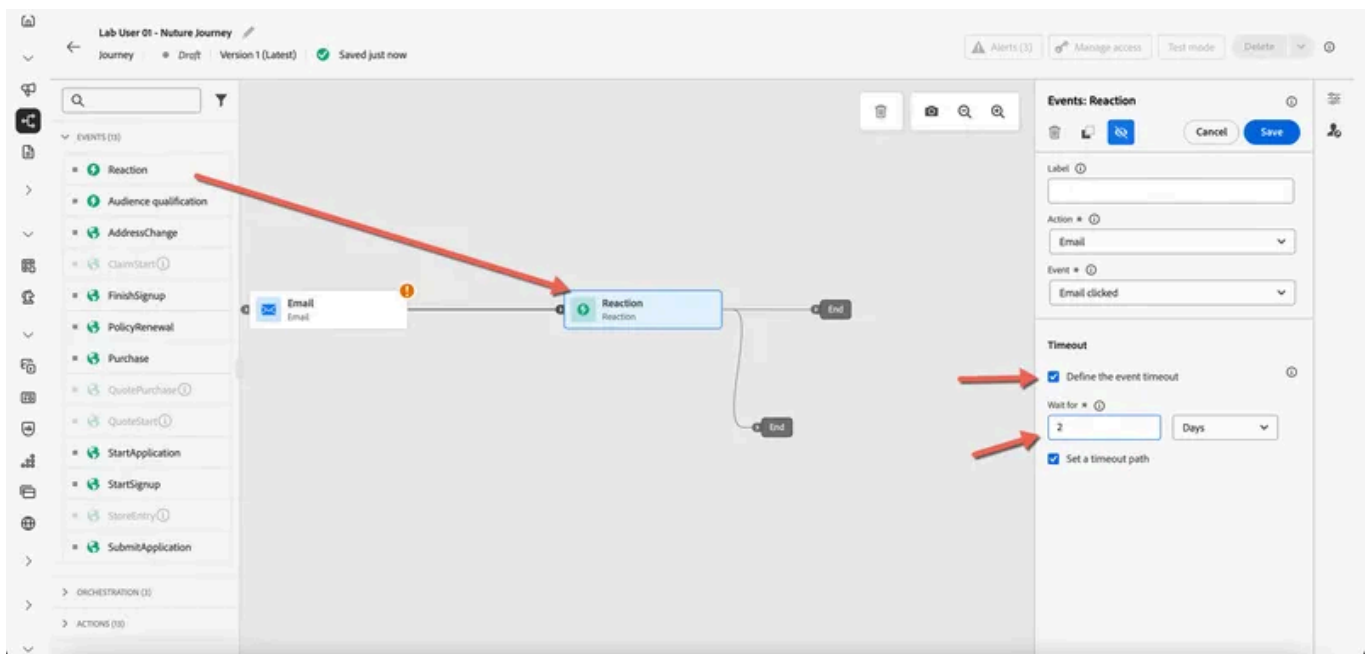
Drag the **StartSignup** event into the panel as our journey trigger.



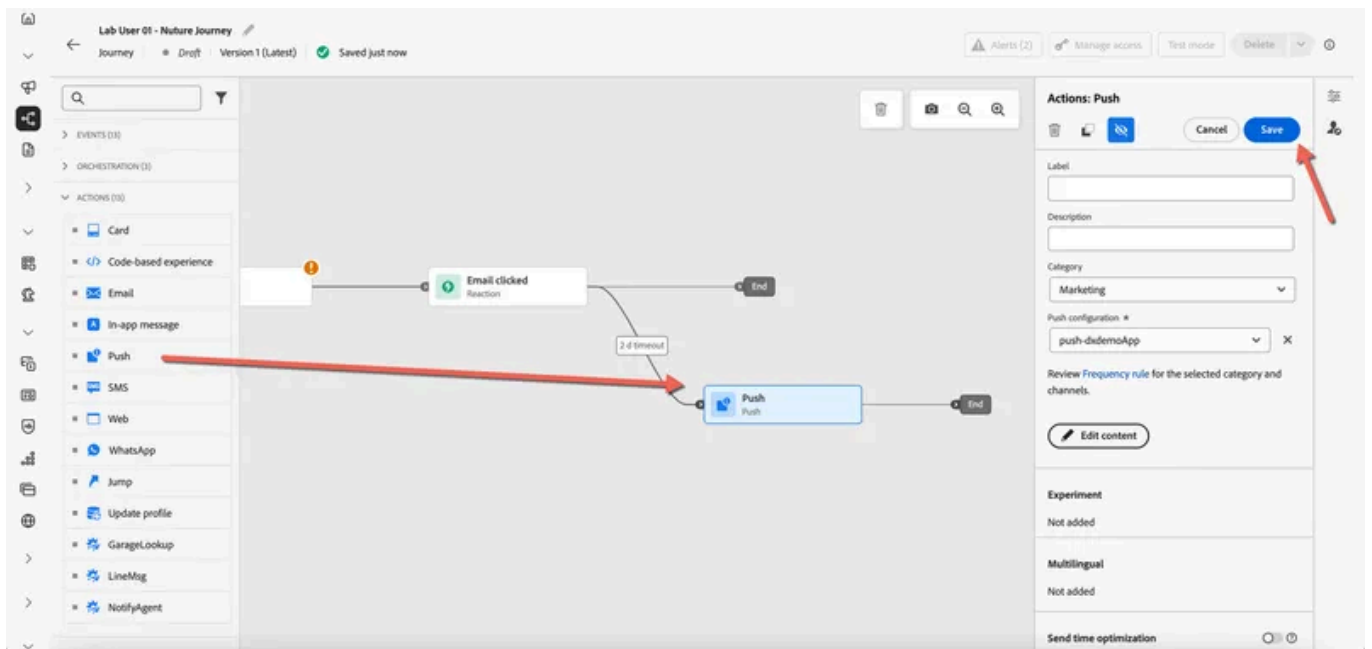
The **Actions** panel is where you'll find the native messaging channels as well as any custom channels or actions that have been enabled in the sandbox. Drag an **Email** action onto the canvas and attach it to the trigger event.



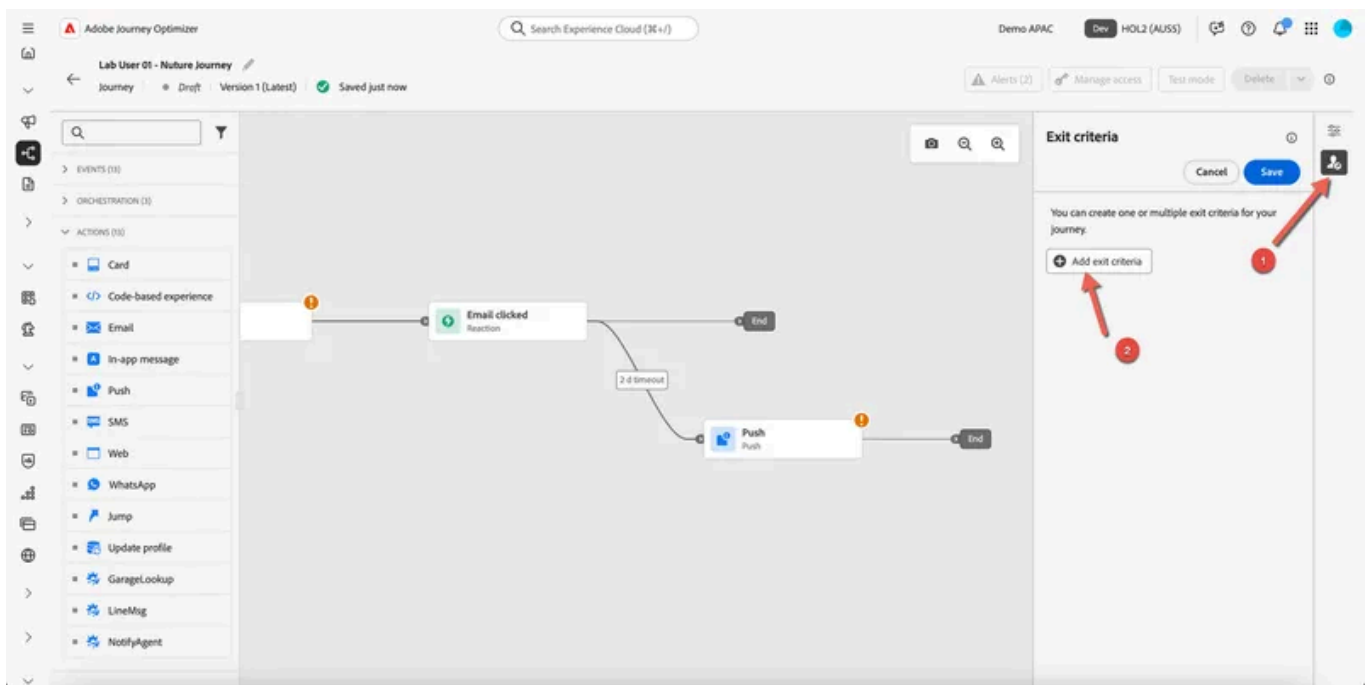
Before we configure the email content we'll finish the journey flow. Returning to the events panel, drag a **Reaction** activity after the email and configure a **Timeout** of 2 days. This triggers the journey to continue after 2 days along the timeout path if the customer does not click the link in the email.



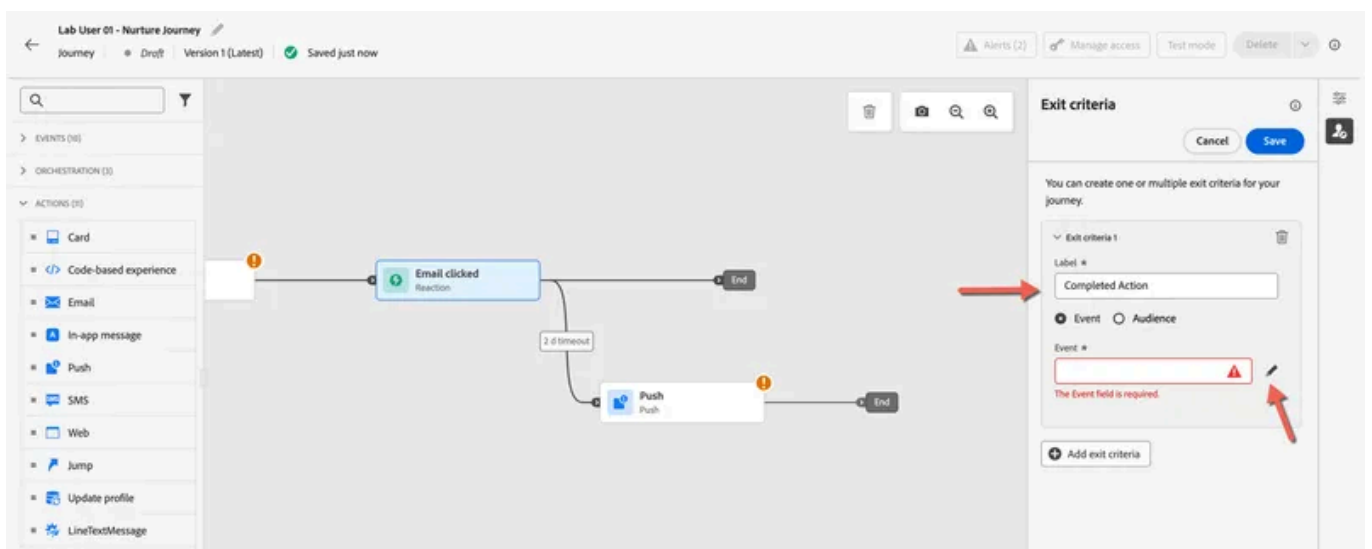
Next drag a **Push** action onto the timeout path and click **Save**



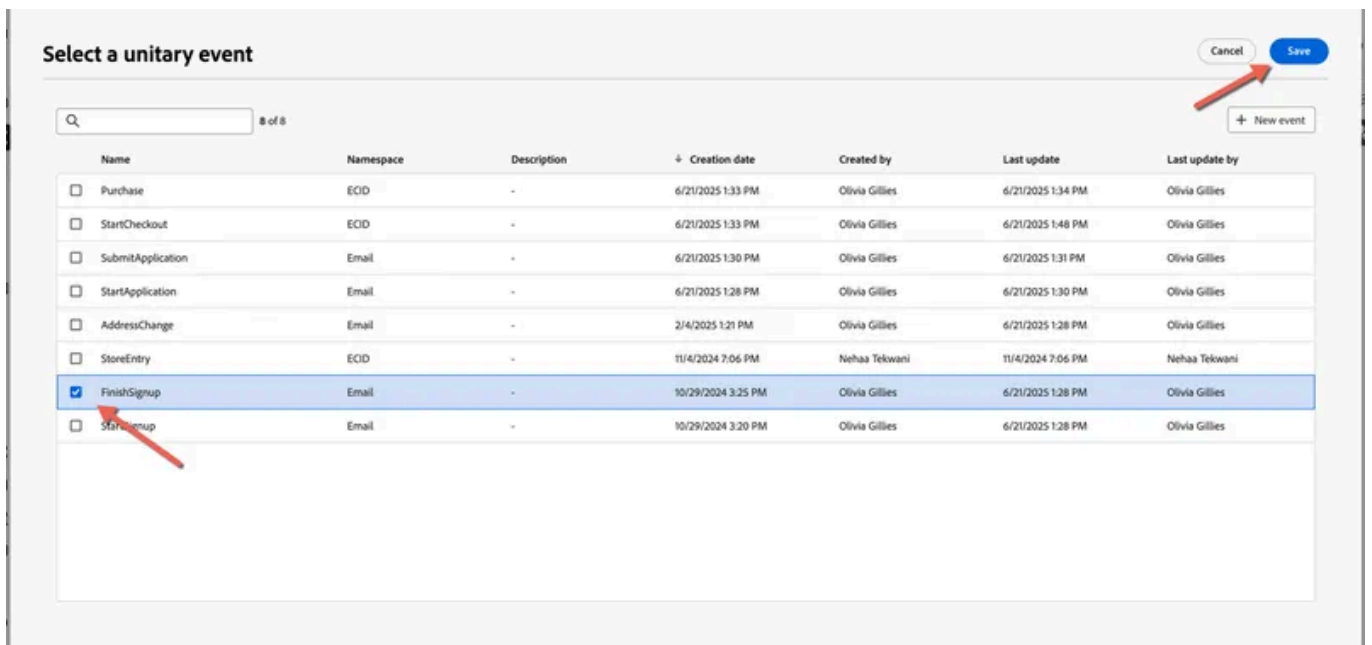
Lastly, we'll add exit criteria to remove profiles from the journey once they complete the desired action, in this case completing their subscription. Click on the profile icon to the right of the journey to open the exit criteria panel. Click the button to add the **exit criteria**.



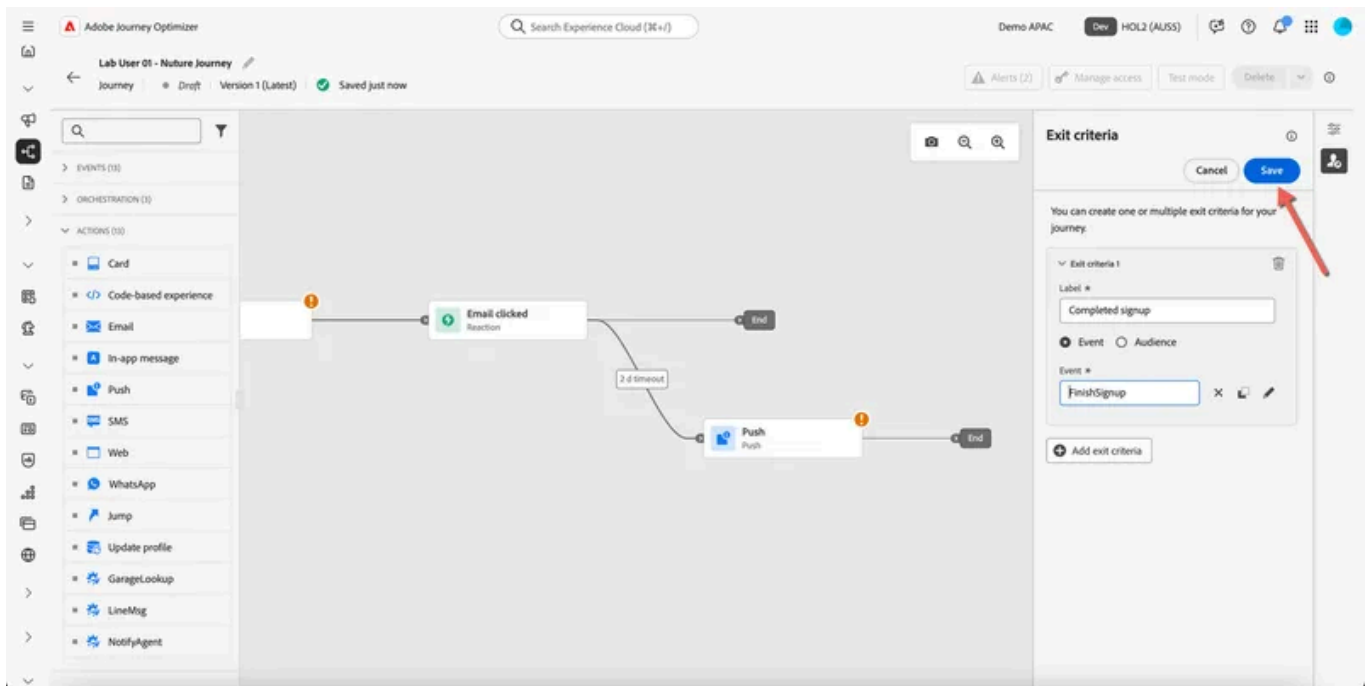
You can use events or audiences as exit criteria, for this example we'll use an event. Click the icon to select an event.



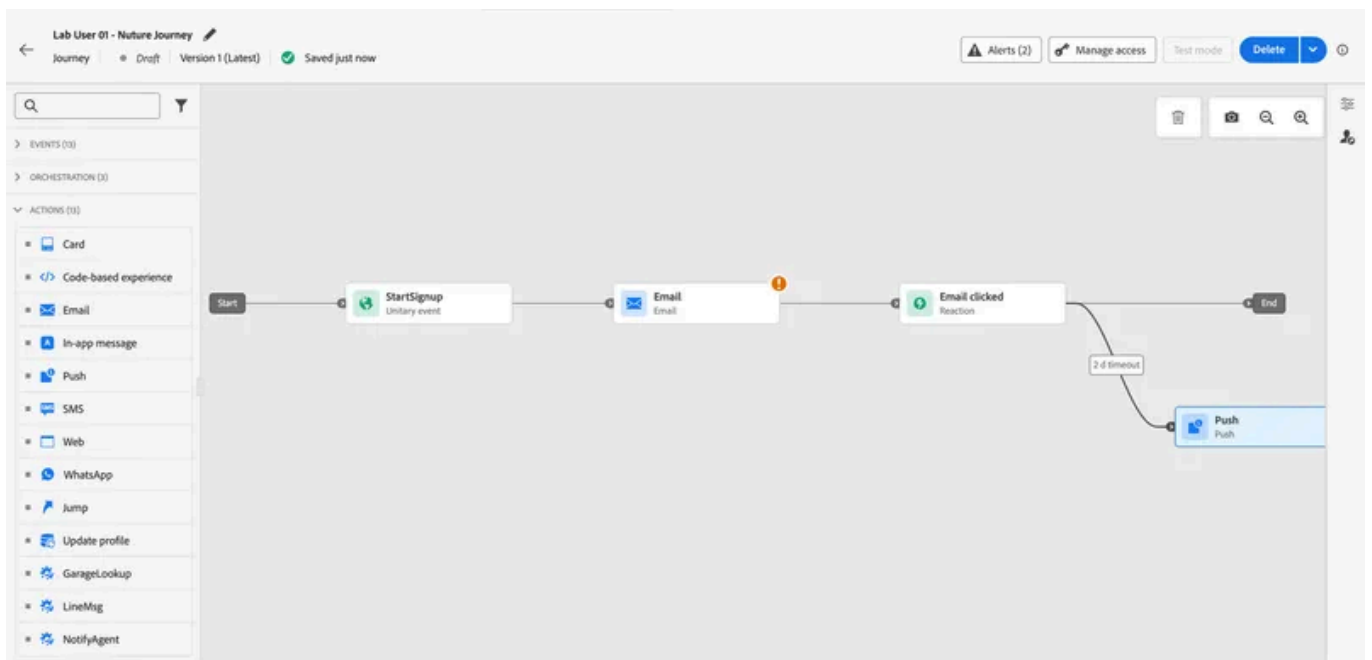
Select the **FinishSignup** event and click **Save**.



Click to **Save** the criteria.



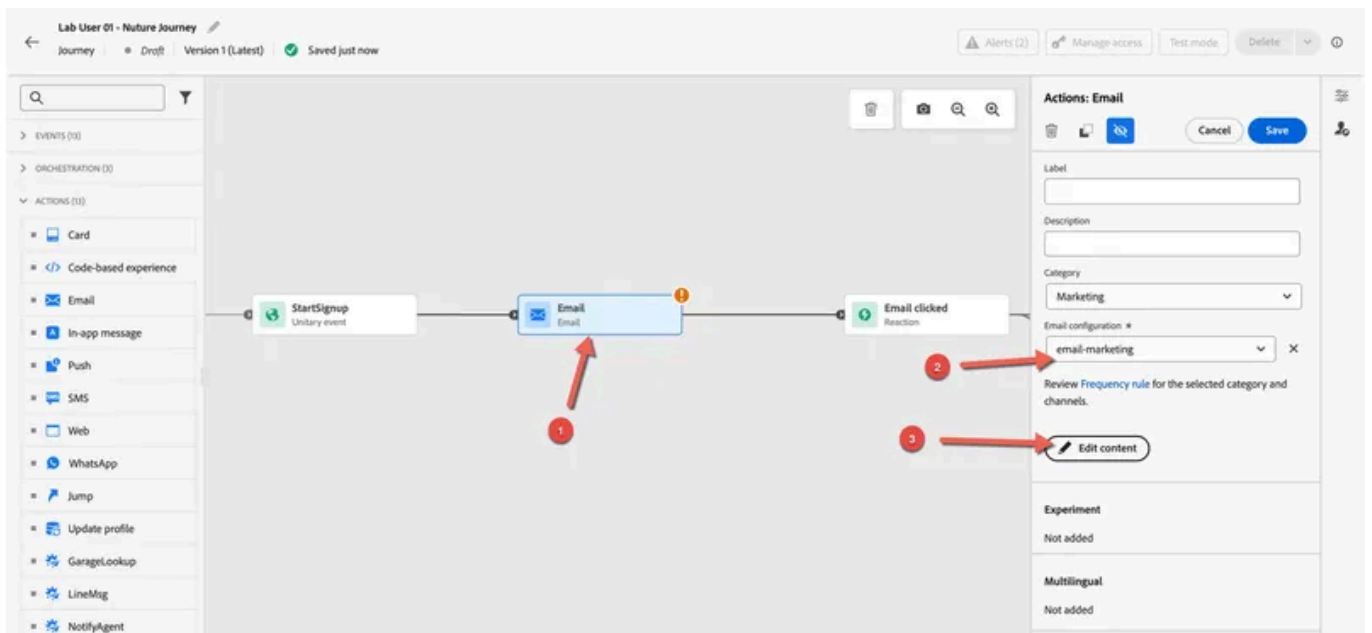
Your journey should look like this.



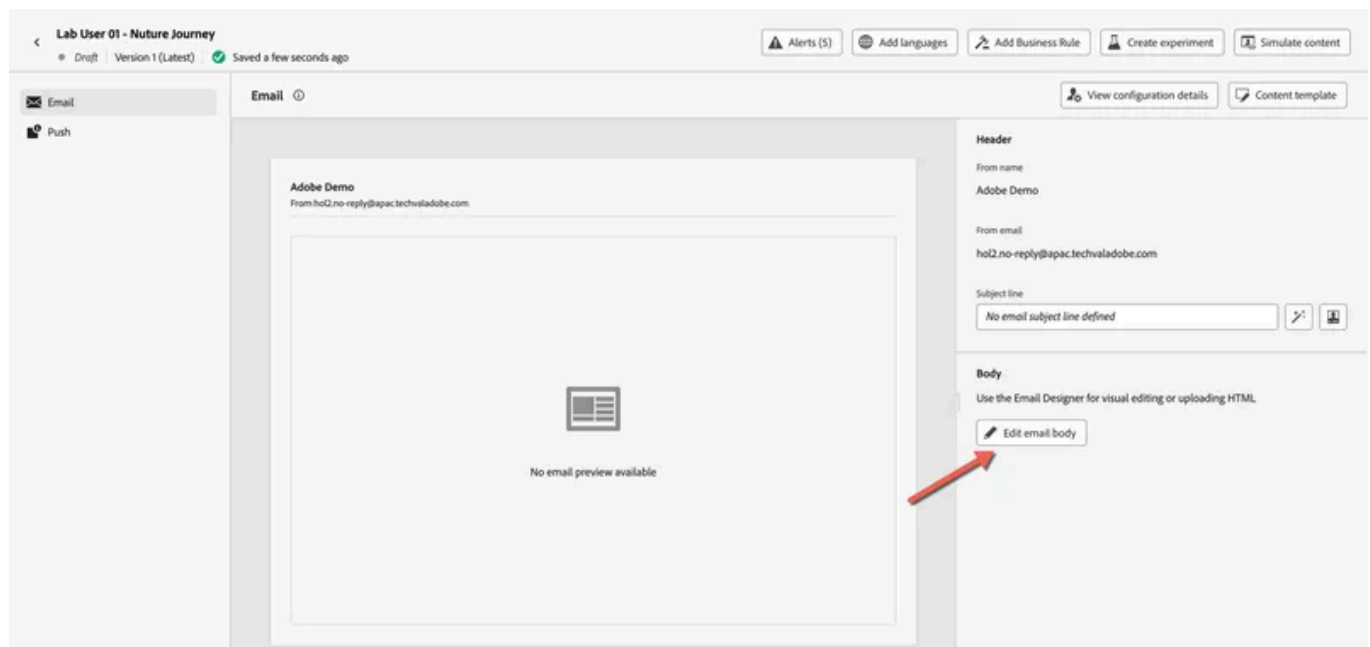
Next we'll add content to our messages.

2.3 Add Email Content

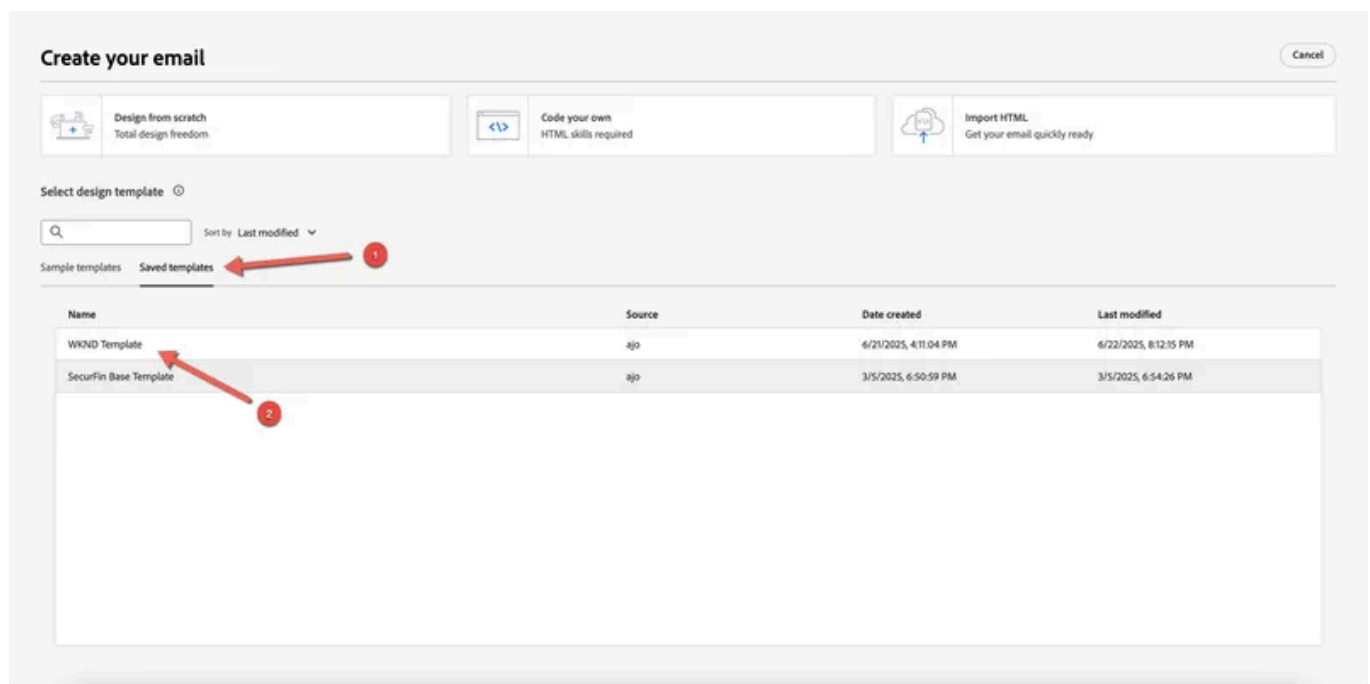
Click on the email activity in your journey, set the **Email Configuration** to 'email-marketing' and click to **Edit Content**.



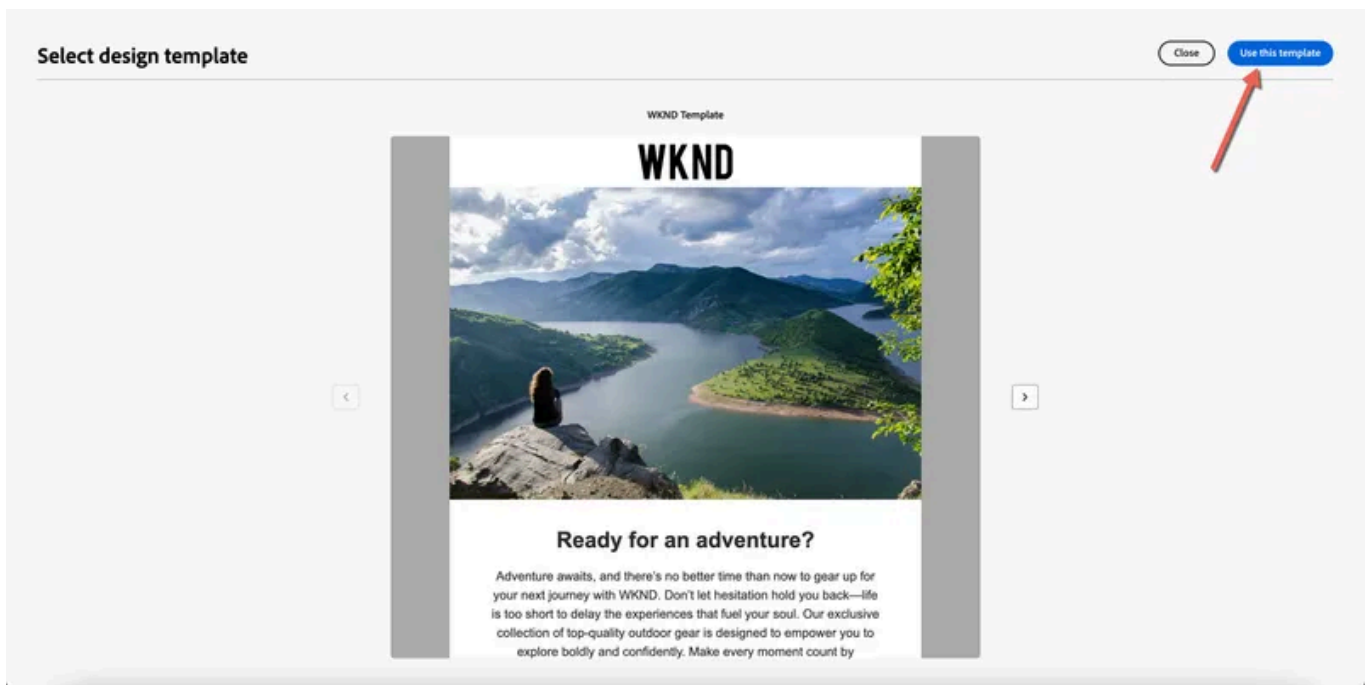
Click to **Edit email body**



For this exercise we'll start with a pre-defined content template. Open the tab to see the **Saved Templates**, then select the **WKND template**.



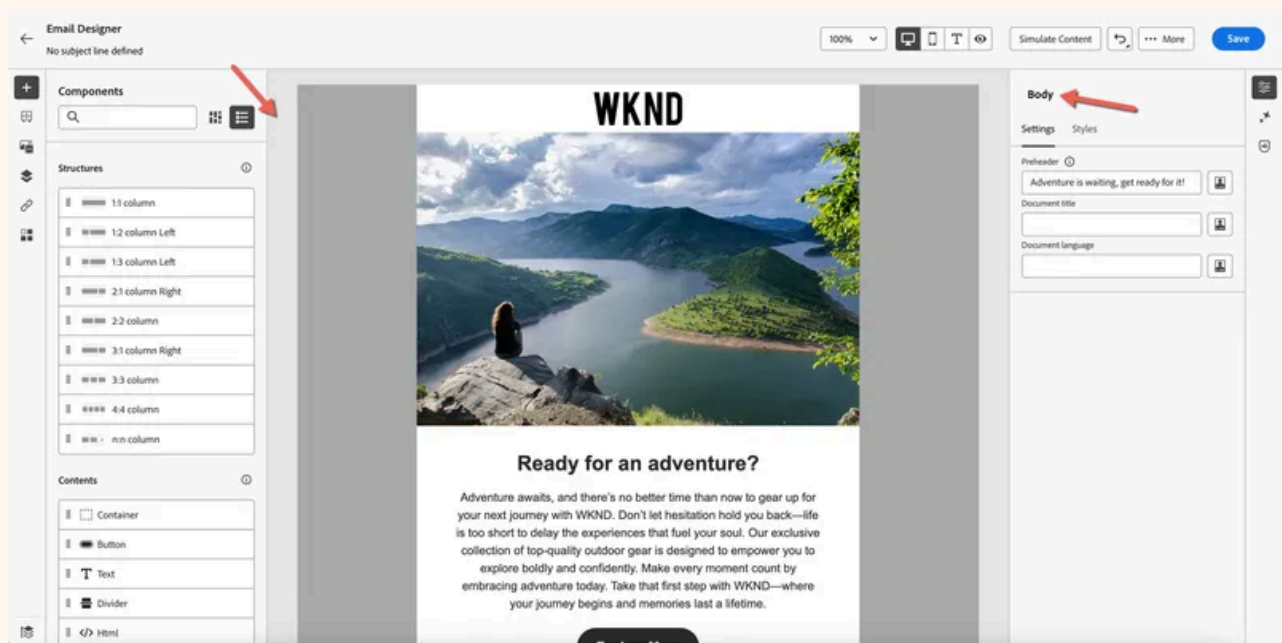
Click to **Use this Template**

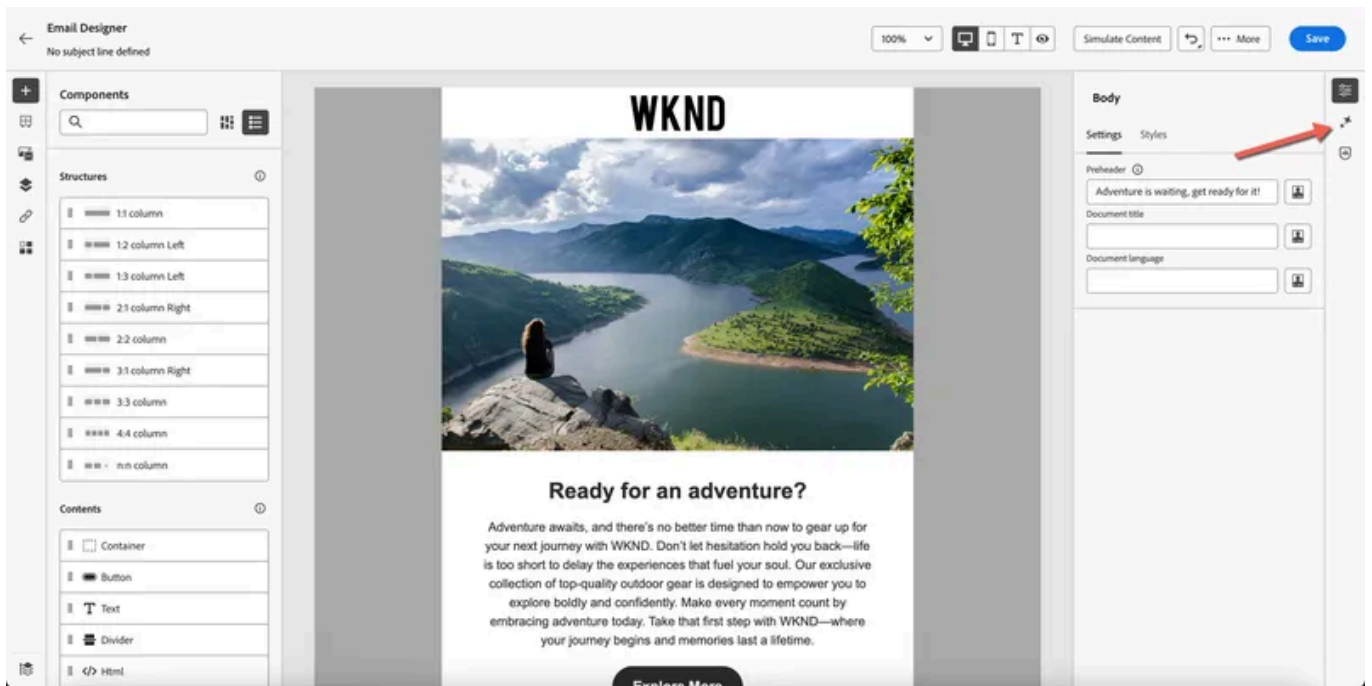


2.4 AI Assistant and Brand alignment

Now we'll use AI Assistant to help us generate variations of this content to use for AB testing. AI Assistant can be used to generate individual images or text components but in this case we're going to generate new variations of the full email. Make sure you have selected the **Body** of the email then click to open the **AI Assistant**.

Top Tip - To select the body click the lighter grey area surrounding the content of the email.





Before generating content we need to select the Brand Guidelines and provide a prompt. Select **WKND** brand and add a prompt of your choosing. Select to generate subject line and Preheader also.

AI Assistant

Generate Email





Settings ⓘ

Brand *

 WKND 

Prompt *

Inspire adventure and spending more time outdoors 

Describe what you'd like to generate.

☒ Subject line ☐ Preheader

 **Text settings** 
None

 **Image settings** 
None

 **Brand assets** 
None

 **Generate** ⓘ

AI generated responses may be inaccurate. Please evaluate outputs for accuracy and appropriateness to your use case. See the [Adobe GenAI User Guidelines](#).

Update the **Text settings** to select the **Tone**, **Language** and **Communication Strategy**.

AI Assistant

Generate Email



 **Text settings**

Communication strategy

Scarcity 

Language ⓘ

English 

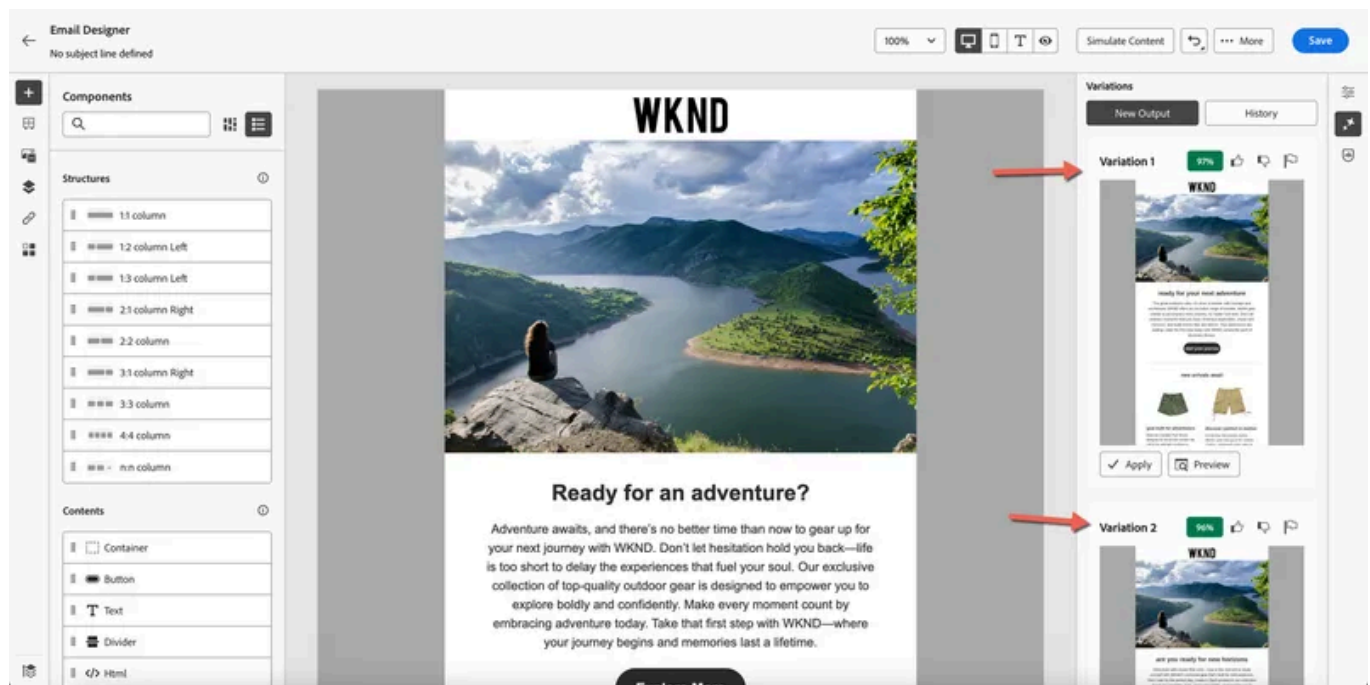
Tone

Inspirational 

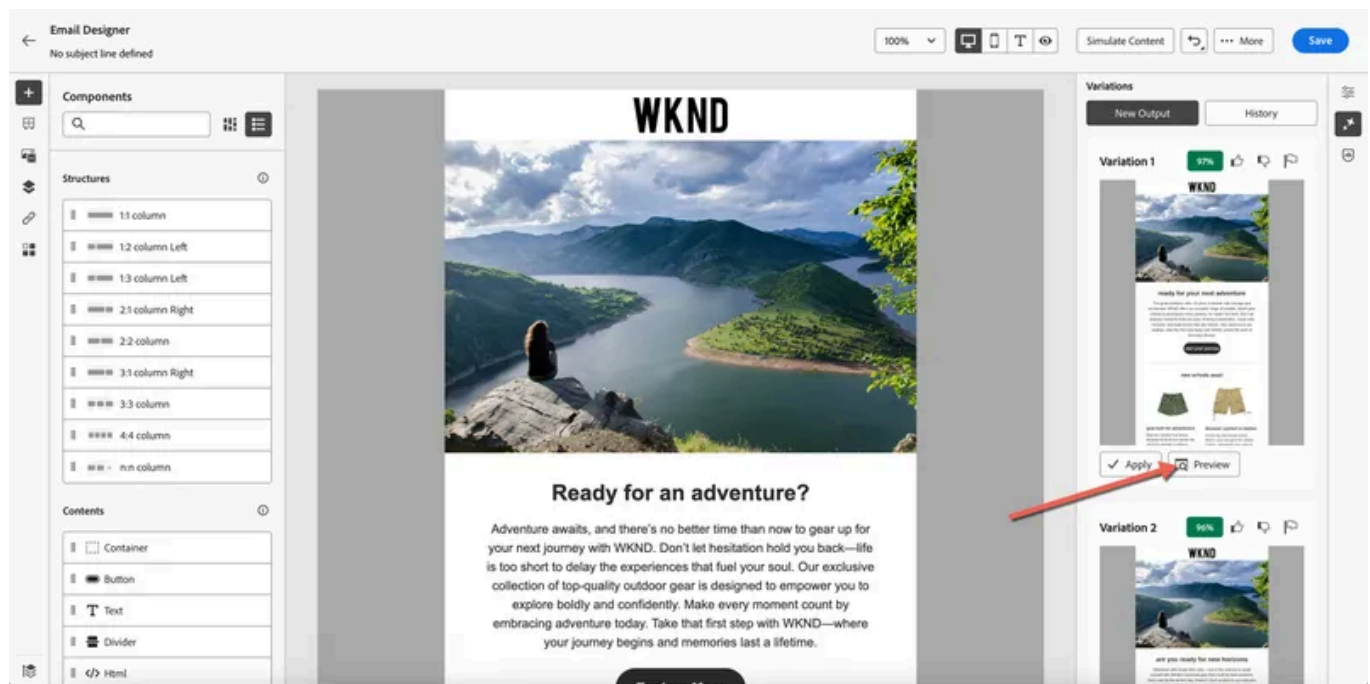
 **Generate** ⓘ

AI generated responses may be inaccurate. Please evaluate outputs for accuracy and appropriateness to your use case. See the [Adobe GenAI User Guidelines](#).

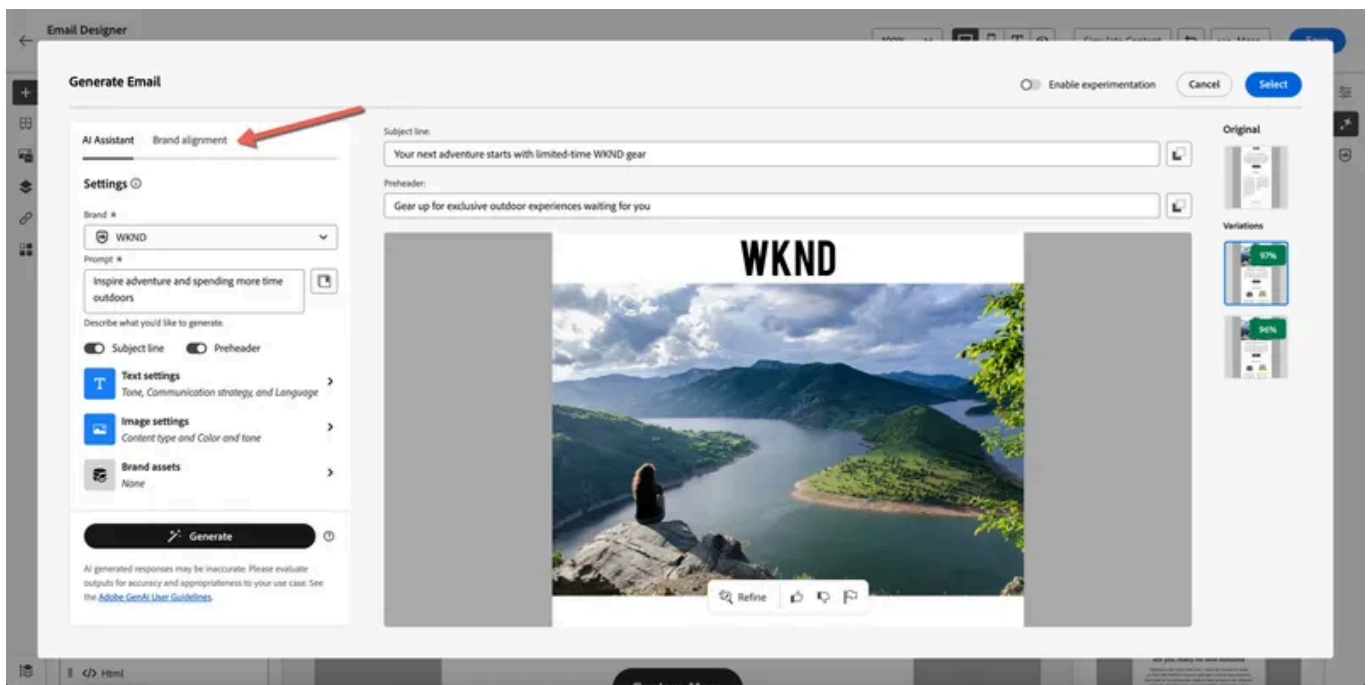
Once you're happy with the settings click to **Generate**. You will shortly see two new variations of the content generated.



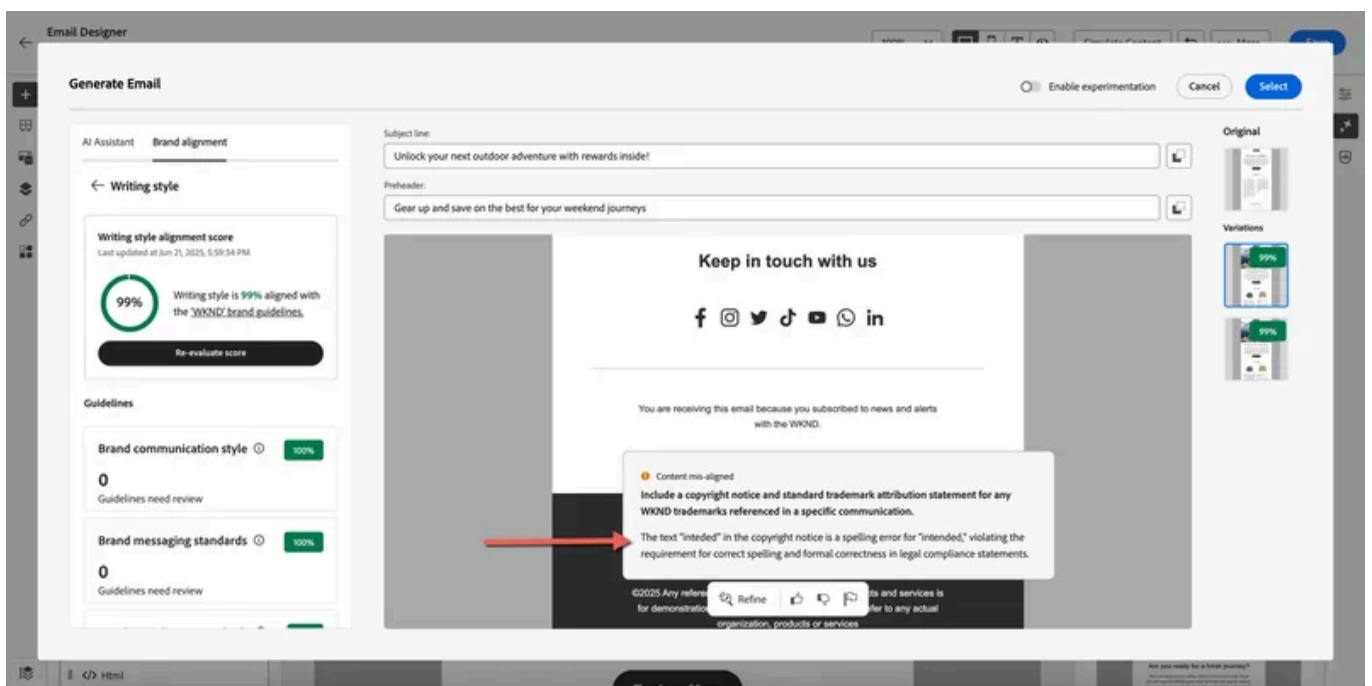
Click to **Preview** a variation.



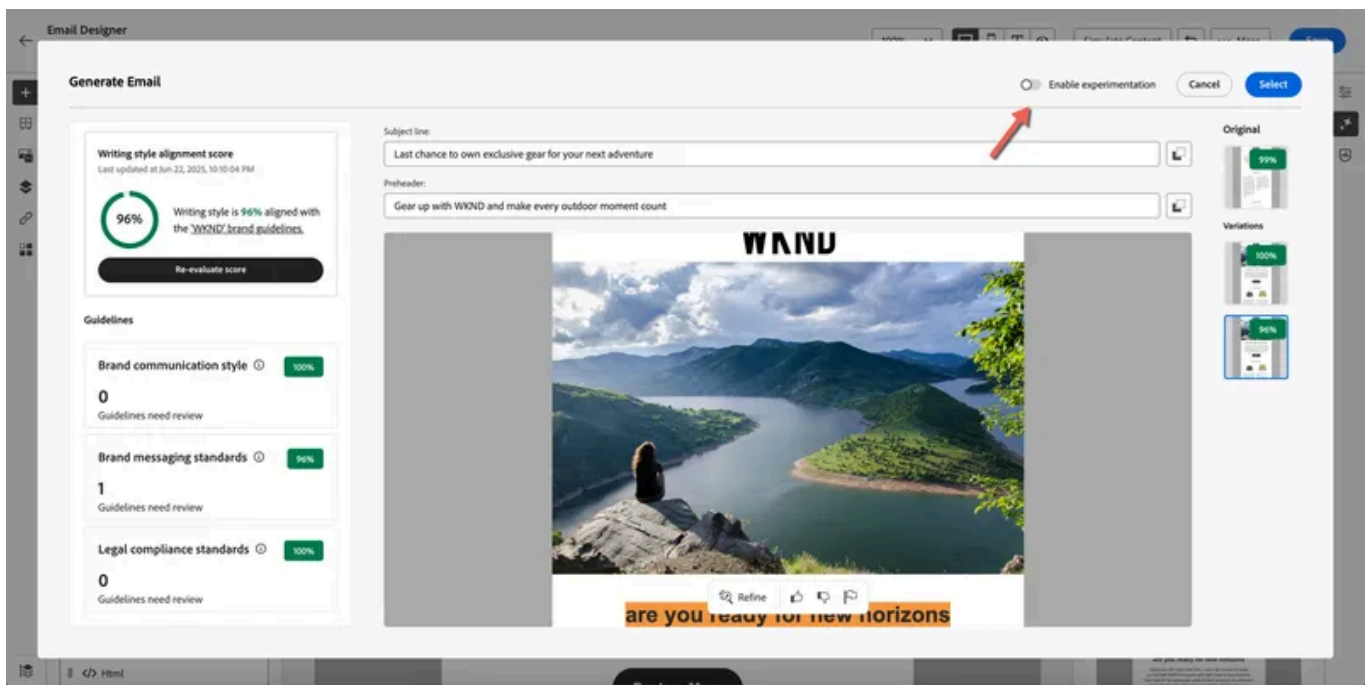
In this view you can review the content in detail, make updates to the prompt and regenerate if needed. It's also where you can review whether or not the content aligns to the Brand guidelines selected. Click on the **Brand alignment**



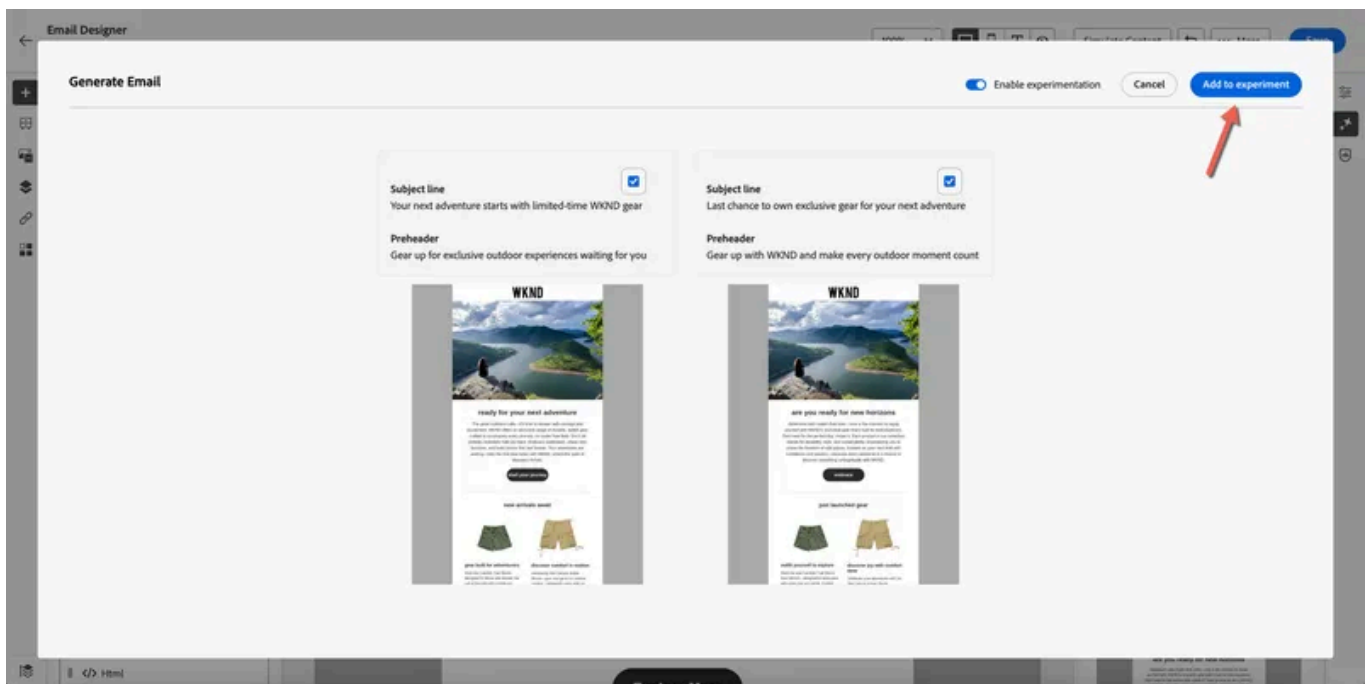
Here you'll see the score along with any warnings for content mis-alignments which you can review.



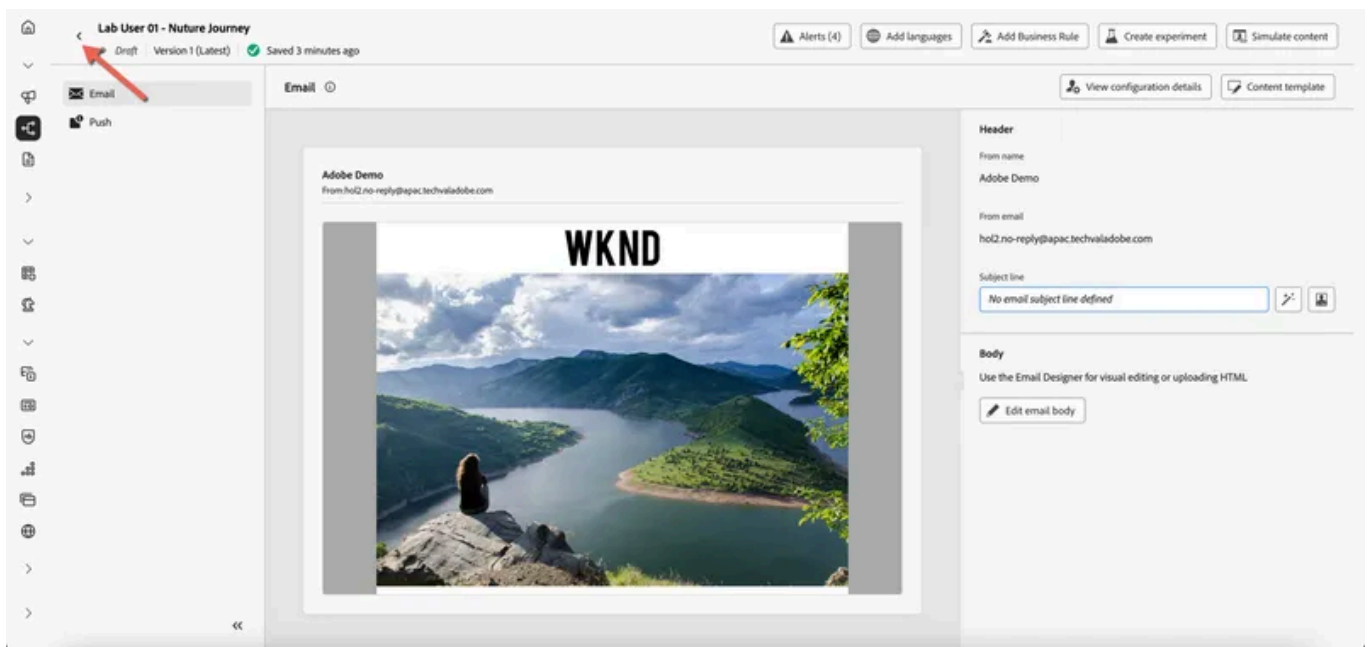
From here you can either select one of the variations to use as your email content or we can create an experiment and add the generated content as variations to test which performs the best. Click the **Enable experimentation** toggle.



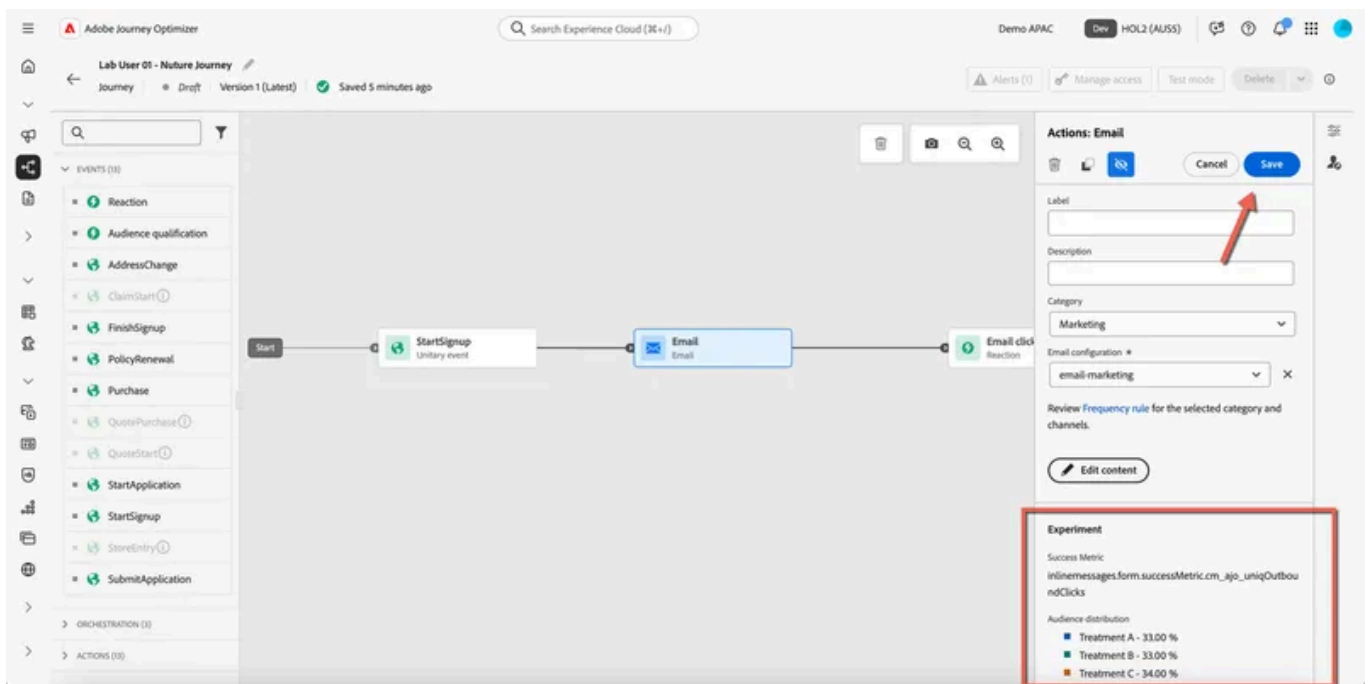
Choose one or both of the variations to **Add to Experiment**



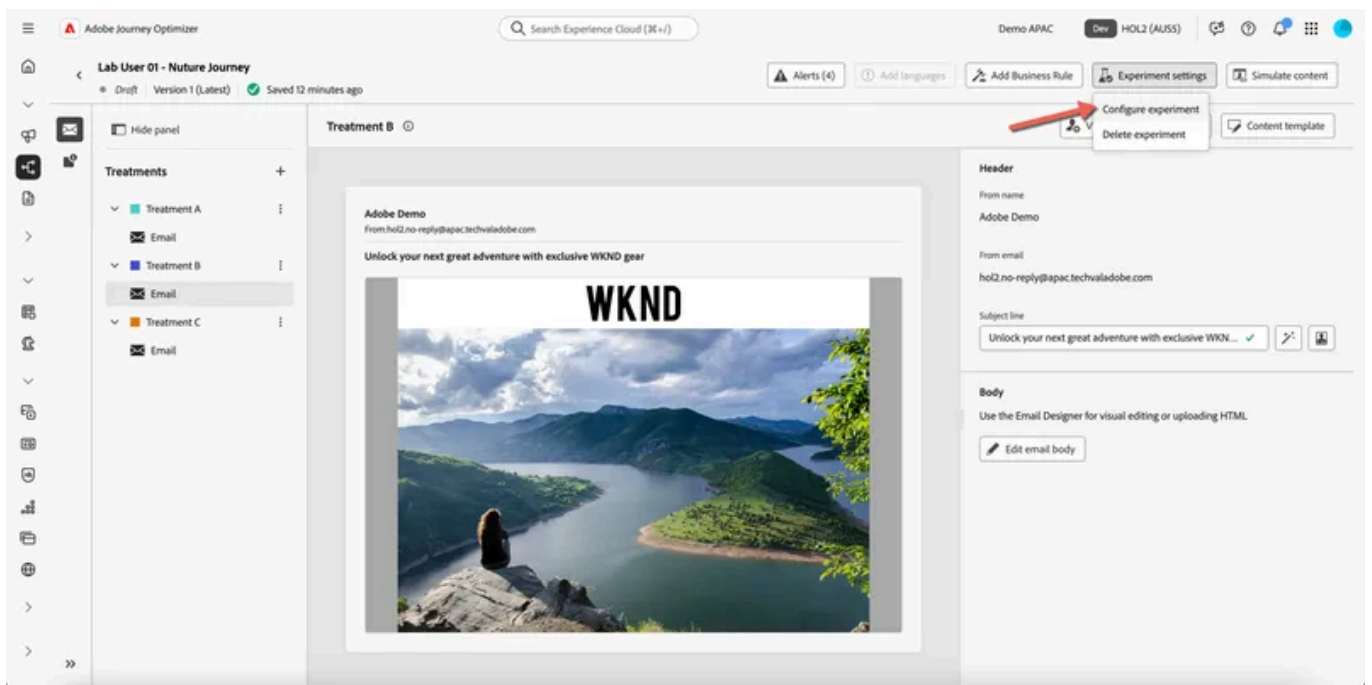
Click the arrow in the top left to return to the journey.



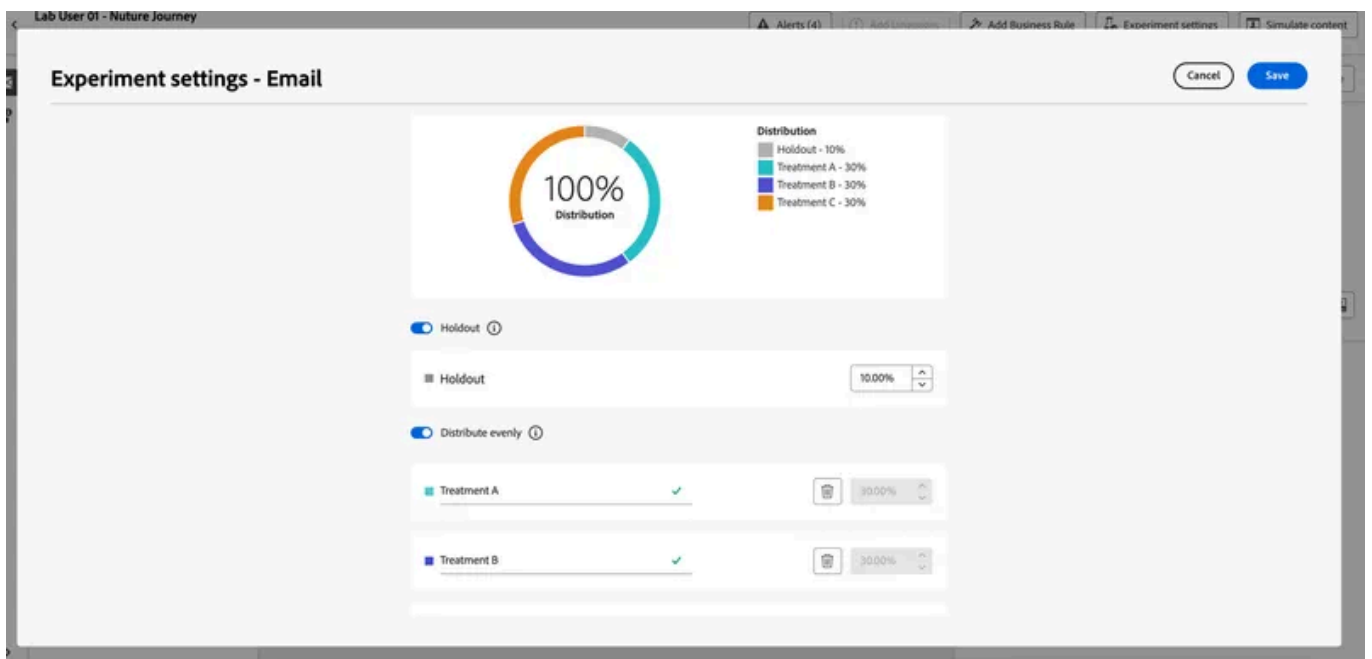
You can see the experiment configuration in the email properties from the journey canvas. Click to **Save** the email.



Click to **Edit content** again, you can see and edit the different variations. Click to **Configure Experiment**

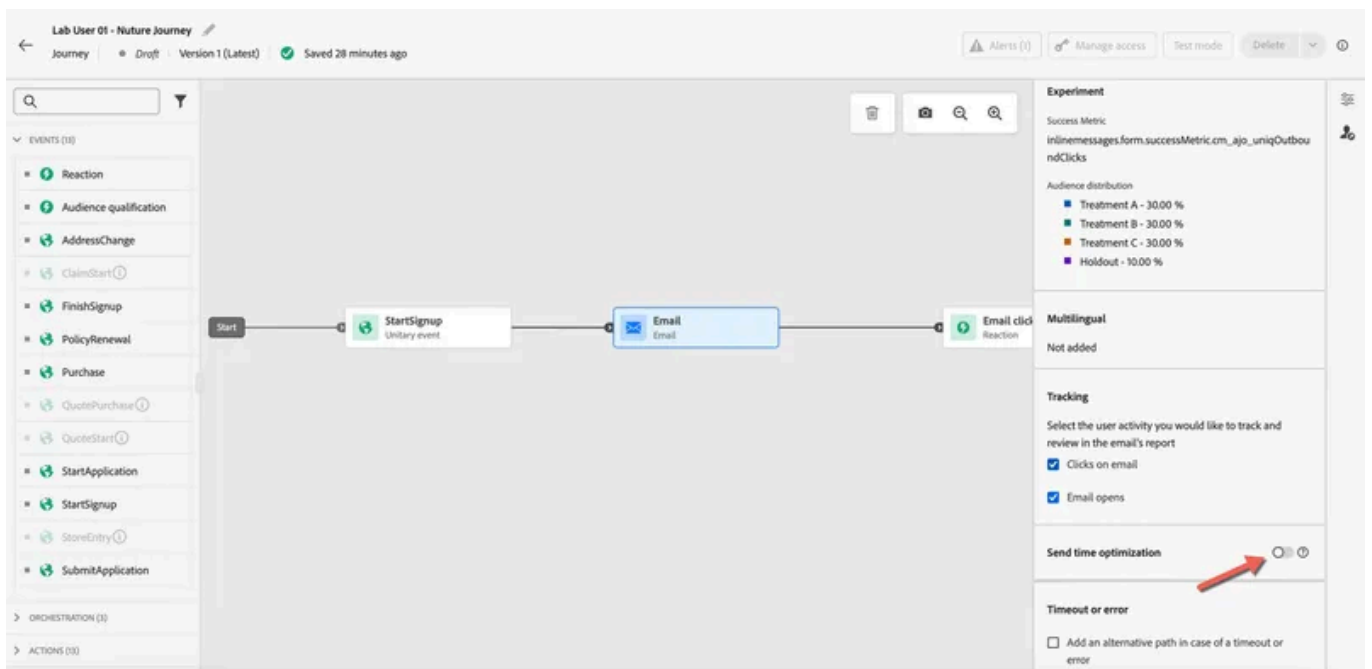


Here you can update the success metric that will be used for determining the outcome of the experiment and set a holdout group if desired. Click the toggles to add a 10% holdout and distribute the rest of the target evenly over the variations.



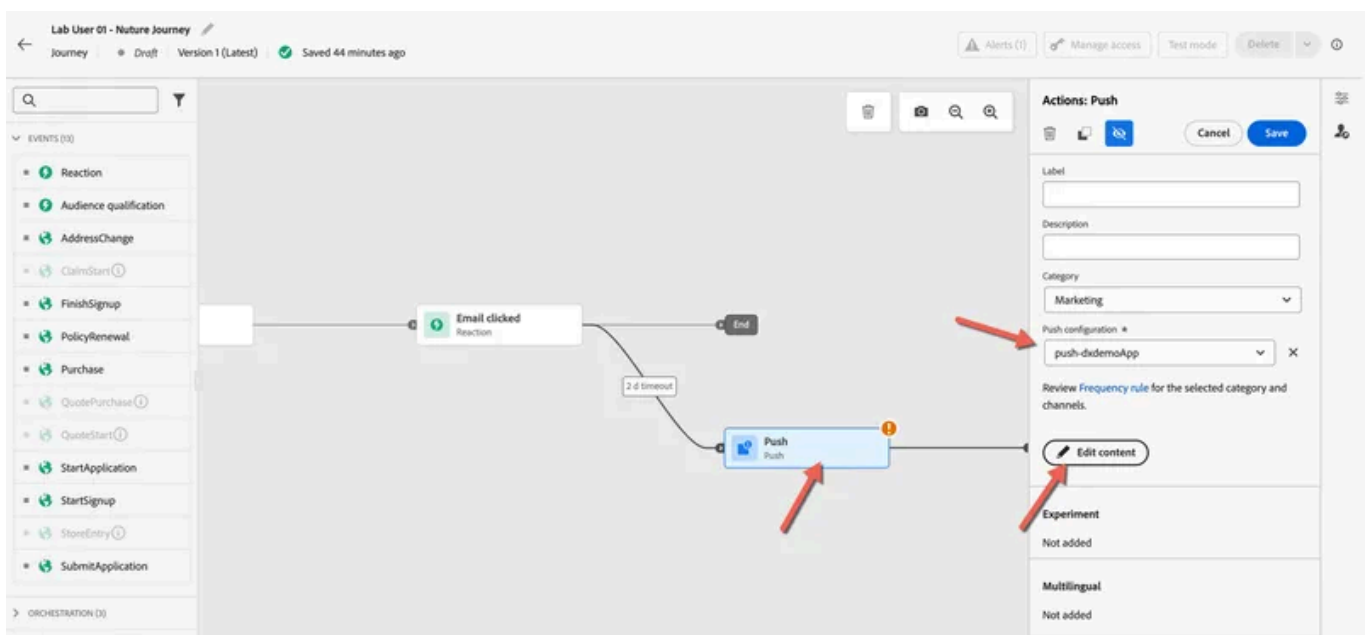
Click to **Save**, and return back to the journey canvas clicking the arrow on the top left.

We can also enable predictive **Send time optimization** to send the messages at the most appropriate time for each profile that enters the journey based on their historical interactions. You can read more about Adobe's Send Time Optimization [here](#).

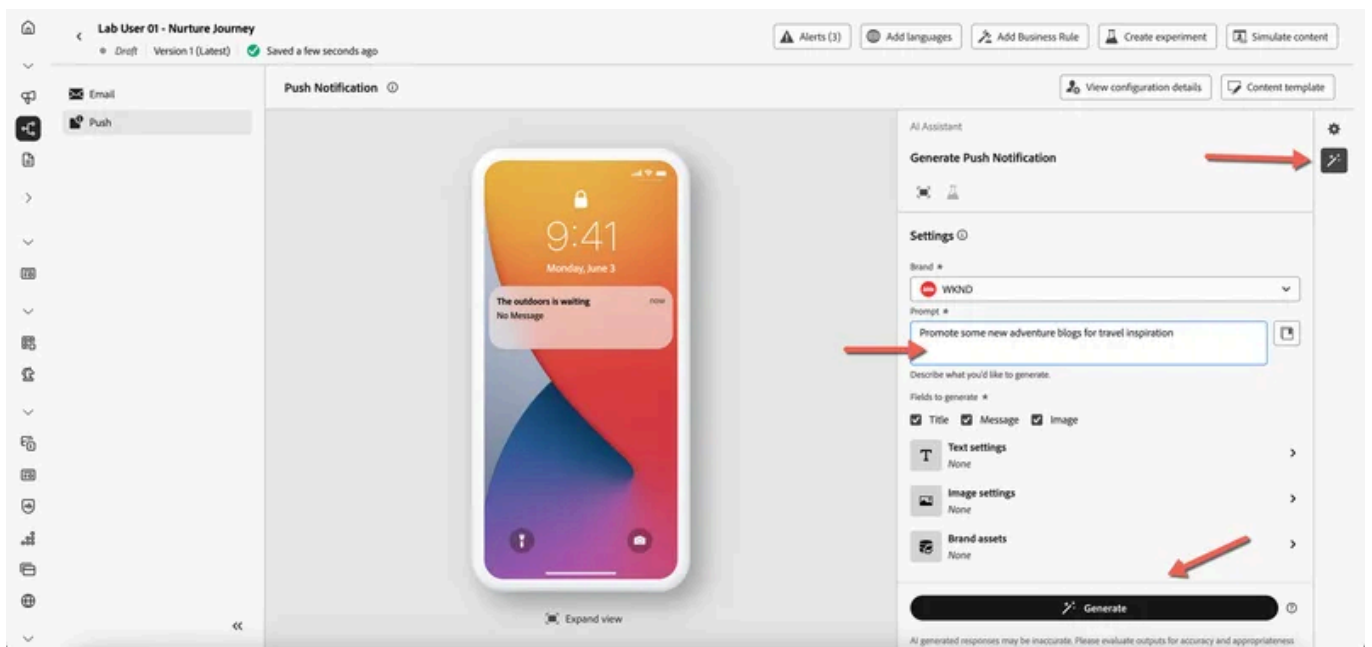


2.5 Add Mobile Push Content

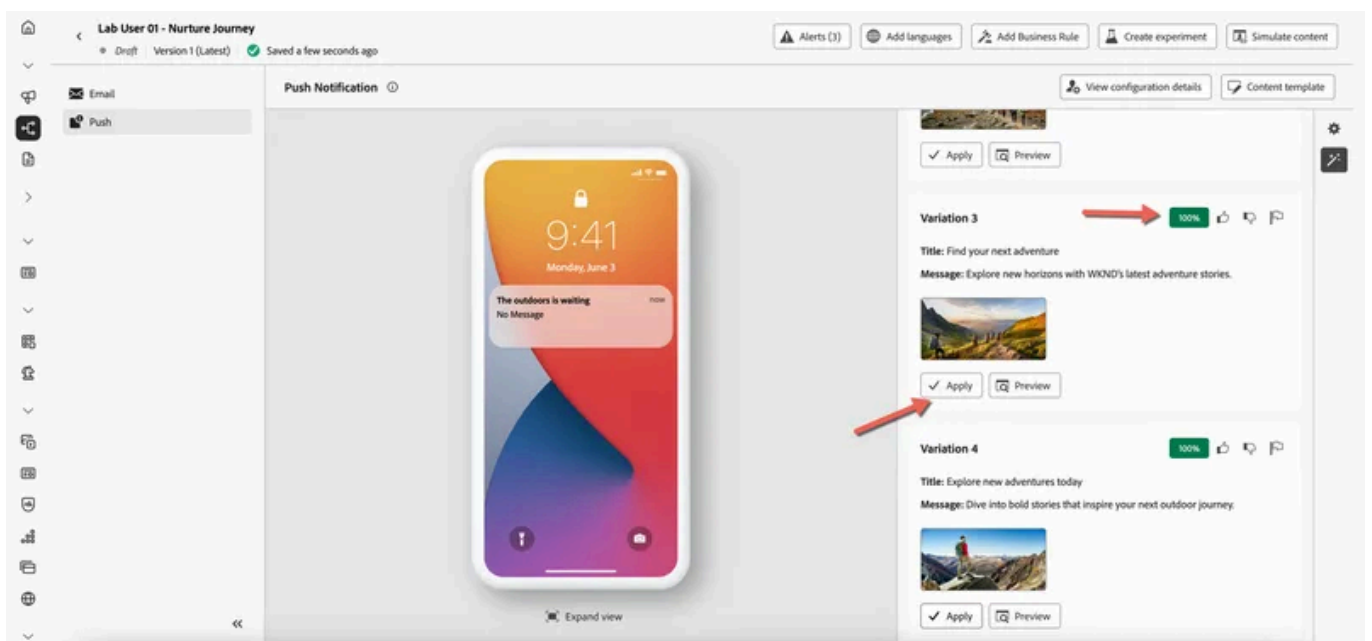
Lastly we'll add some content to our push notification, we can use AI Assistant to help with this as well. Click on the push notification action in your journey, set the configuration and click to **Edit Content**.



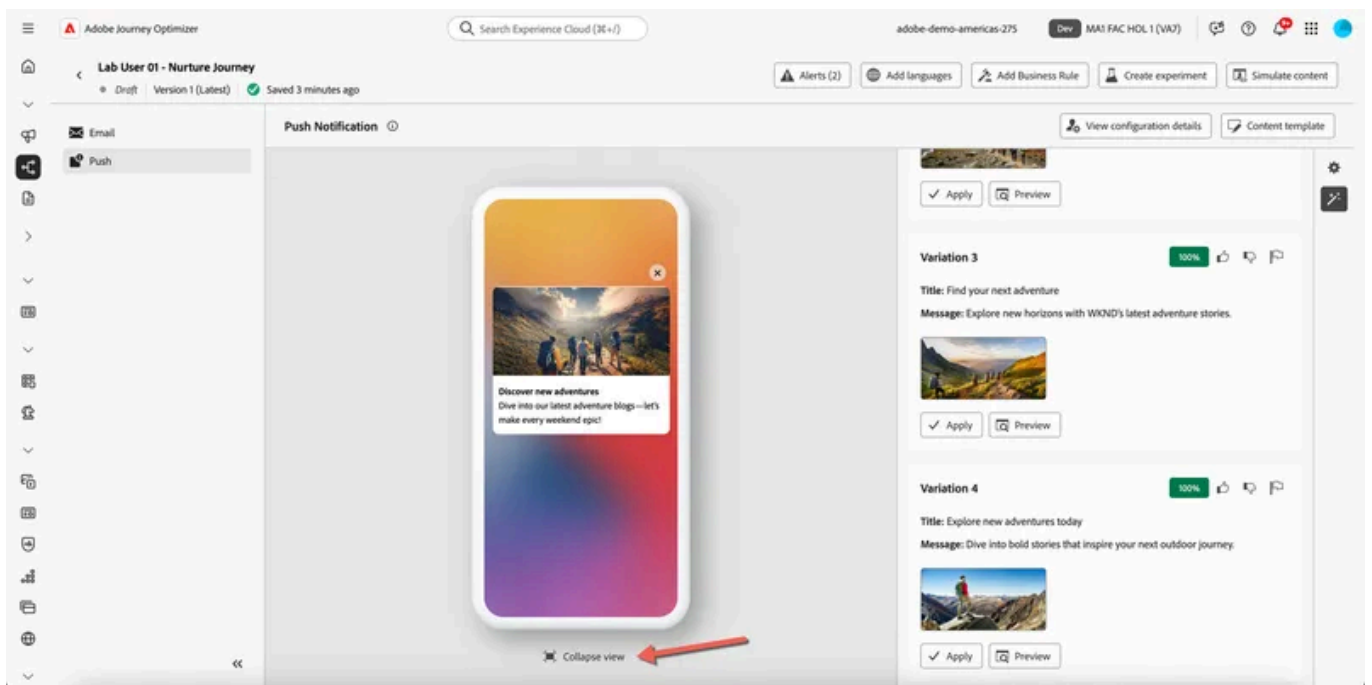
Open the AI Assistant, add a text prompt and tick the elements you want to generate (title, message and/or image). Click to **Generate**



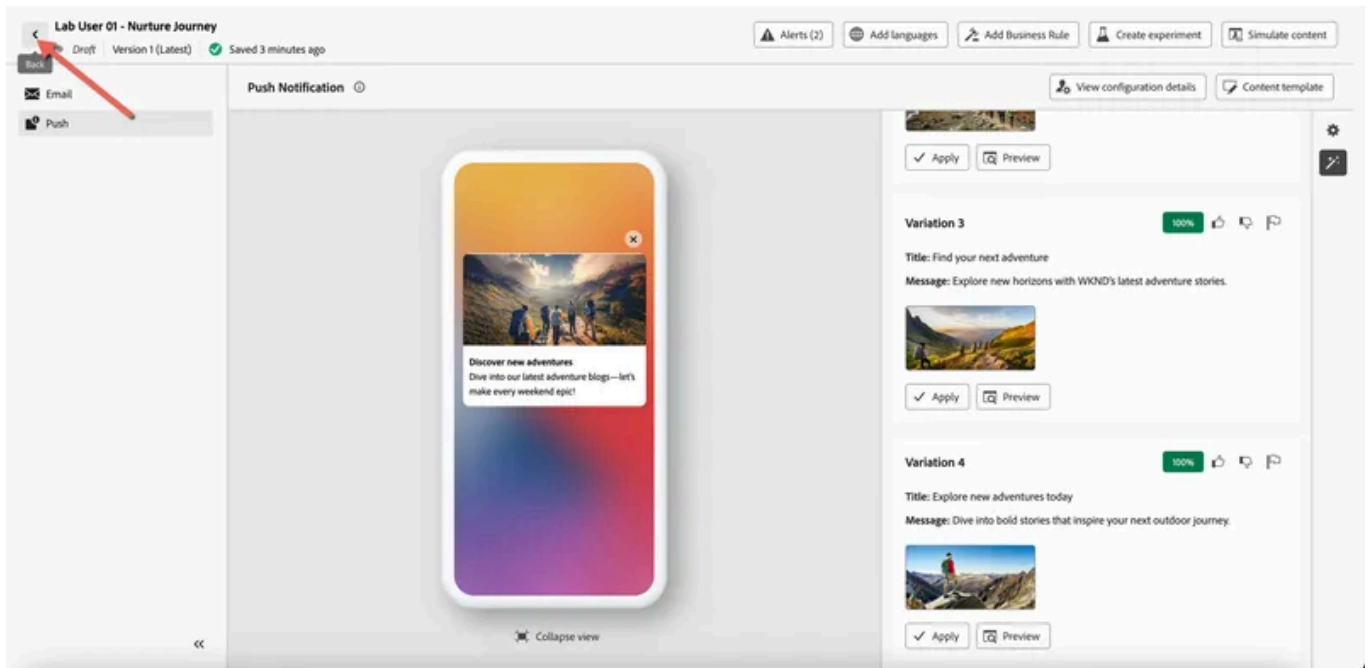
You can see the variations along with their brand alignment score, AI assistant has helped to generate a title a body and an image for the push. Click to Apply your chosen variation. Note: You may see a message saying *"Error converting image to base64"* - you can close and ignore this as it's just part of our shared demo environment testing.



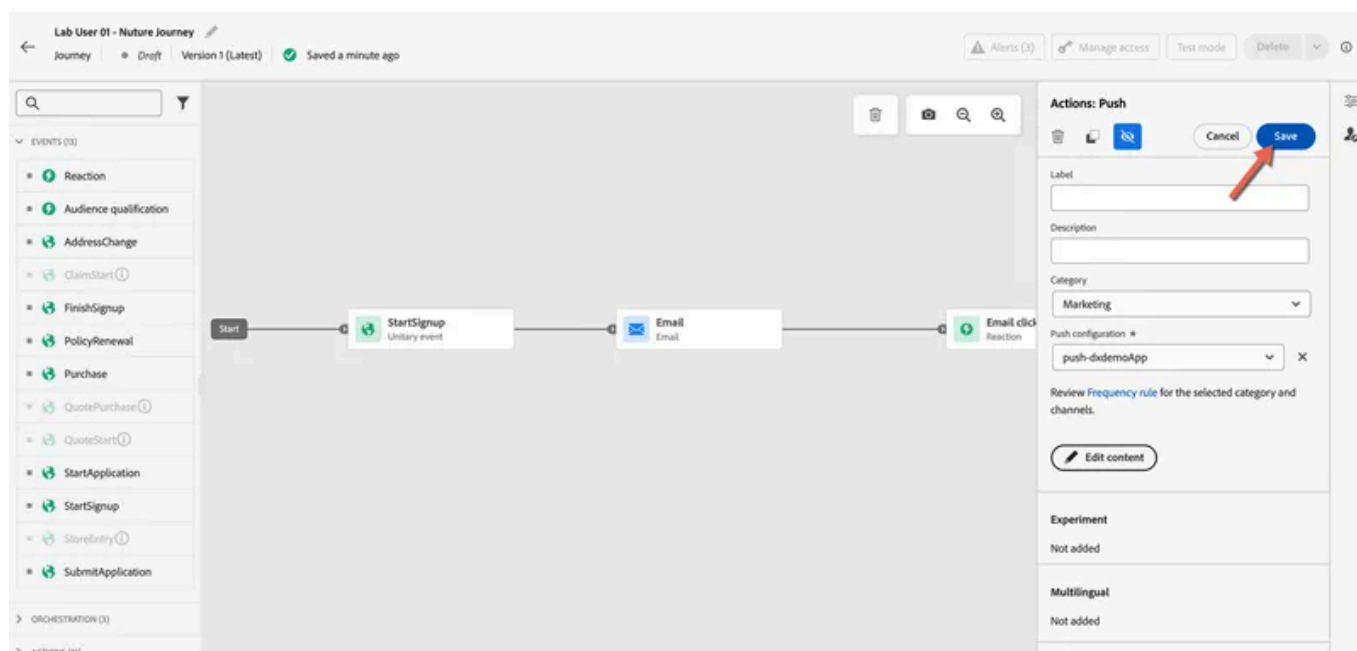
Use the Expand View button at the bottom of the editor to show how the message will look when previewed before clicking through.



Click the arrow on the top left to return to your journey.



Click to Save the push action. Your journey is now complete.



Summary

Congratulations, you've successfully created a multi-channel triggered journey to nurture a customer towards a desired outcome. You've used AI Assistant to quickly generate variations without compromising on brand integrity.

If you still have time available, try one of the other labs!

4. Lab 3 - Omni-channel Insights

Learning Objectives

In this exercise you will become familiar with the Customer Journey Analytics interface and learn how to leverage its ad hoc analysis to understand the end-to-end journey customers are taking across channels. We will showcase the significance in understanding all data sources to answer your business questions and introduce some of the new features unique to Customer Journey Analytics such as Forecasting, Guided Analysis, Intelligent Insights, Journey Mapping and Summary Data Support.

Scenario

SecurFinancial are a leading retail bank offering personal banking services across a range of loans, credit cards and insurance products. They have recently upgraded from Adobe Analytics to Customer Journey Analytics and connected previously silo'd report suites from their mobile app and website into a single data view in CJA. They have also connected data from the Call Center and In Branch interactions.

While business is good, the call center and branch managers have been complaining that they need more staff to keep up with the demand.

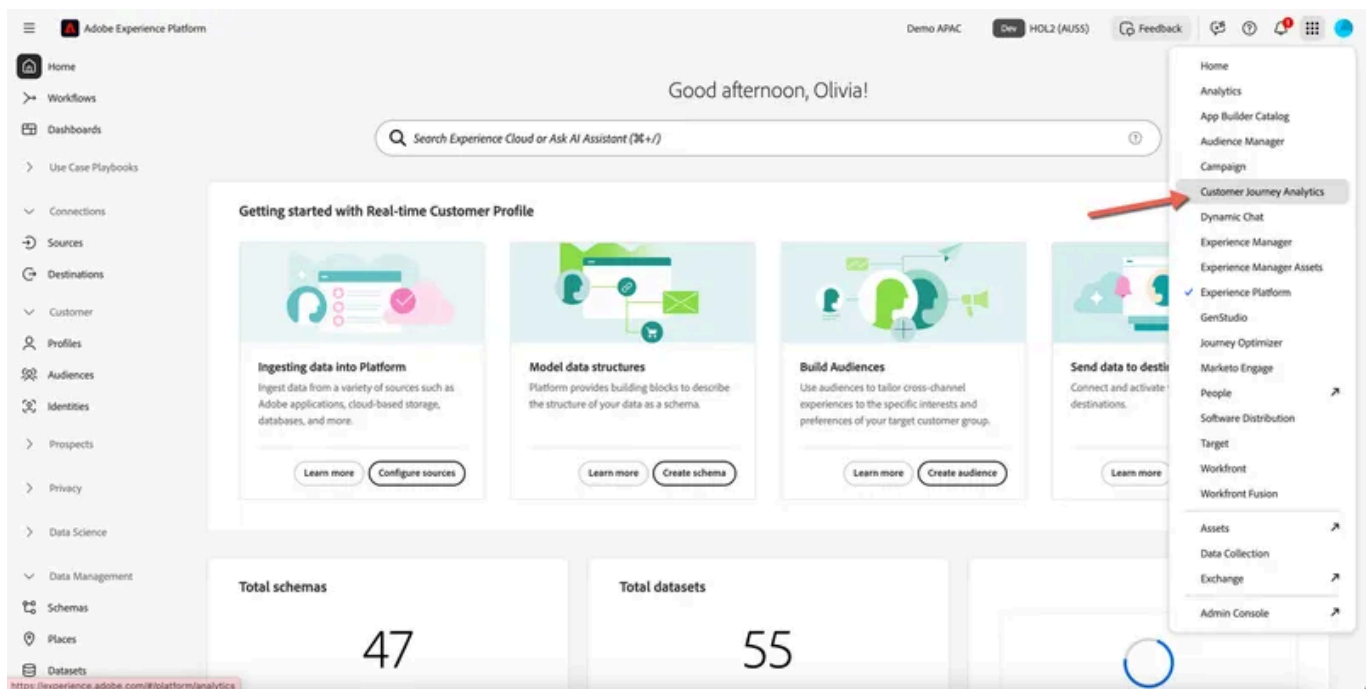
As an analyst you've been tasked with identifying and locating any current issues in their customer journeys and locate opportunities to divert offline interactions to digital channels.

Access

Your login credentials should be available on your desk including your lab participant number.

Login via <https://platform.adobe.com>

Once authenticated switch to **Customer Journey Analytics** using the solution switcher:

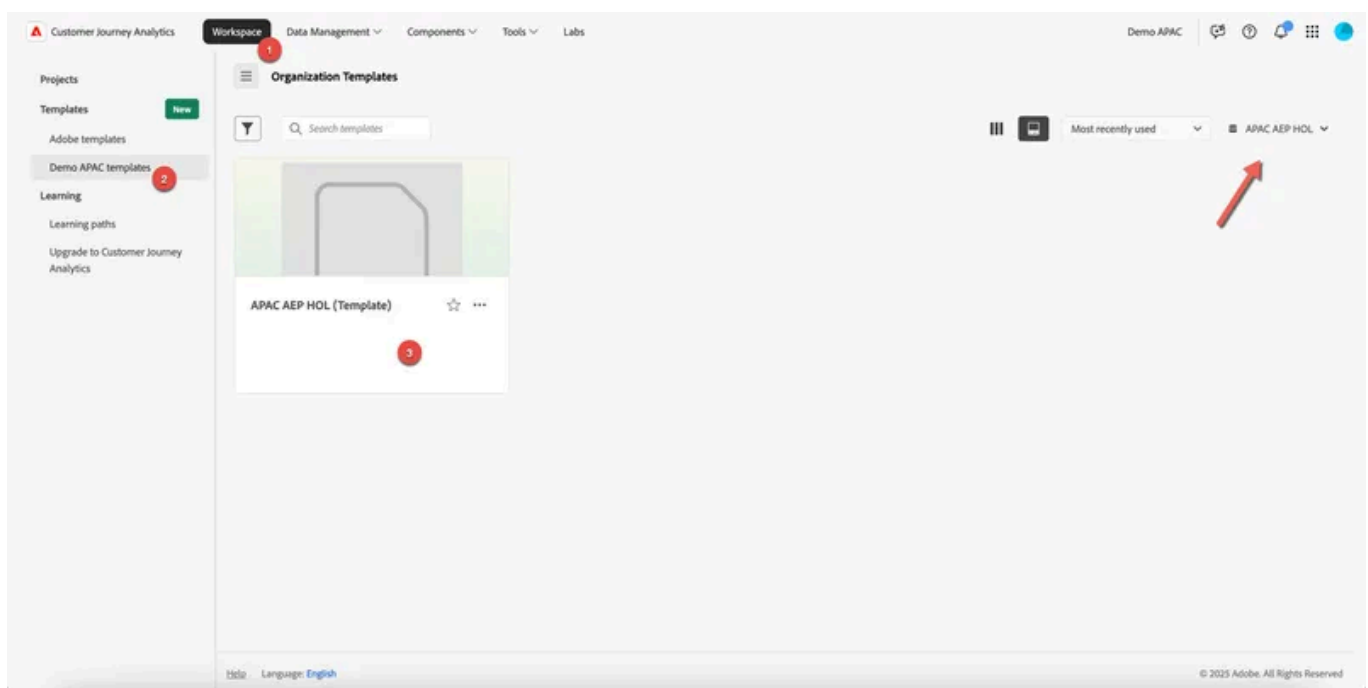


3.1 Create a project

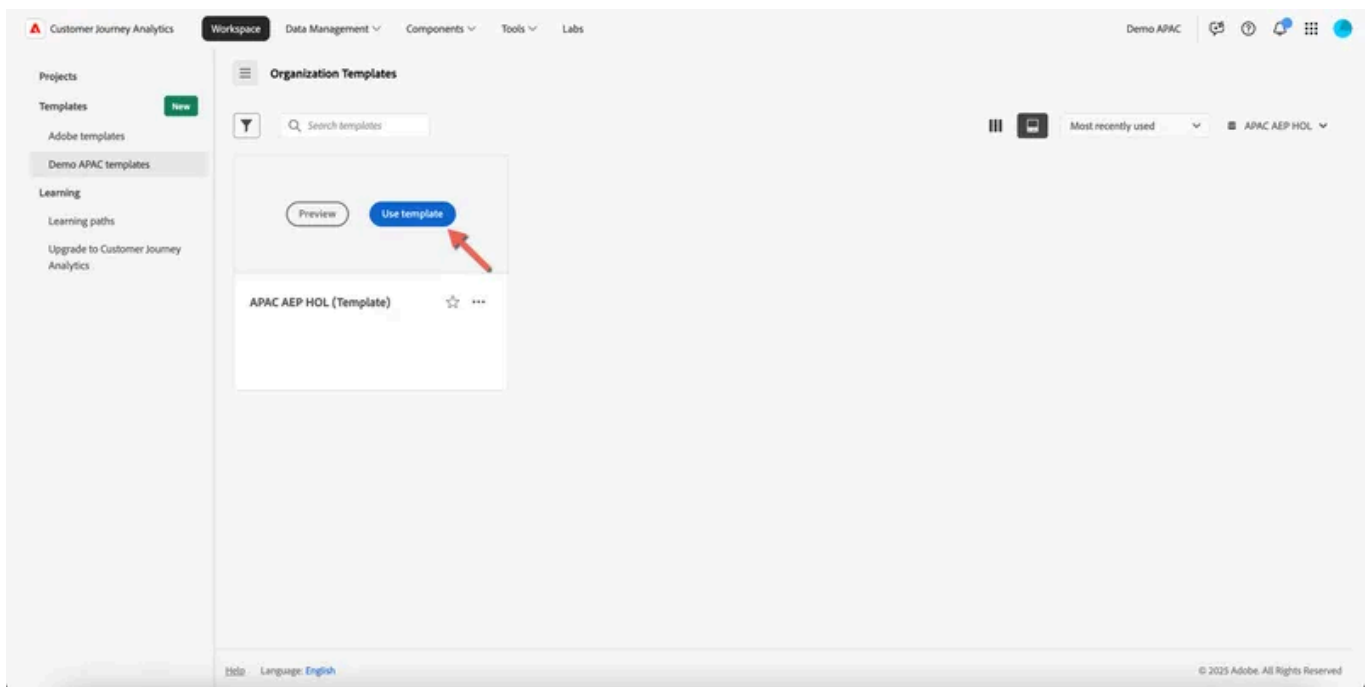
First we'll start by creating a new project from a pre-built template. This will provide you with some initial insights while giving you an isolated area to explore the data further.

Under **Workspace** → **Templates** → **Demo APAC templates** you should see a template called **APAC AEP HOL (Template)**.

If you don't see it, check on the top right that the dataview is set to **APAC AEP HOL**.



Hover over the template card and click to **Use template**



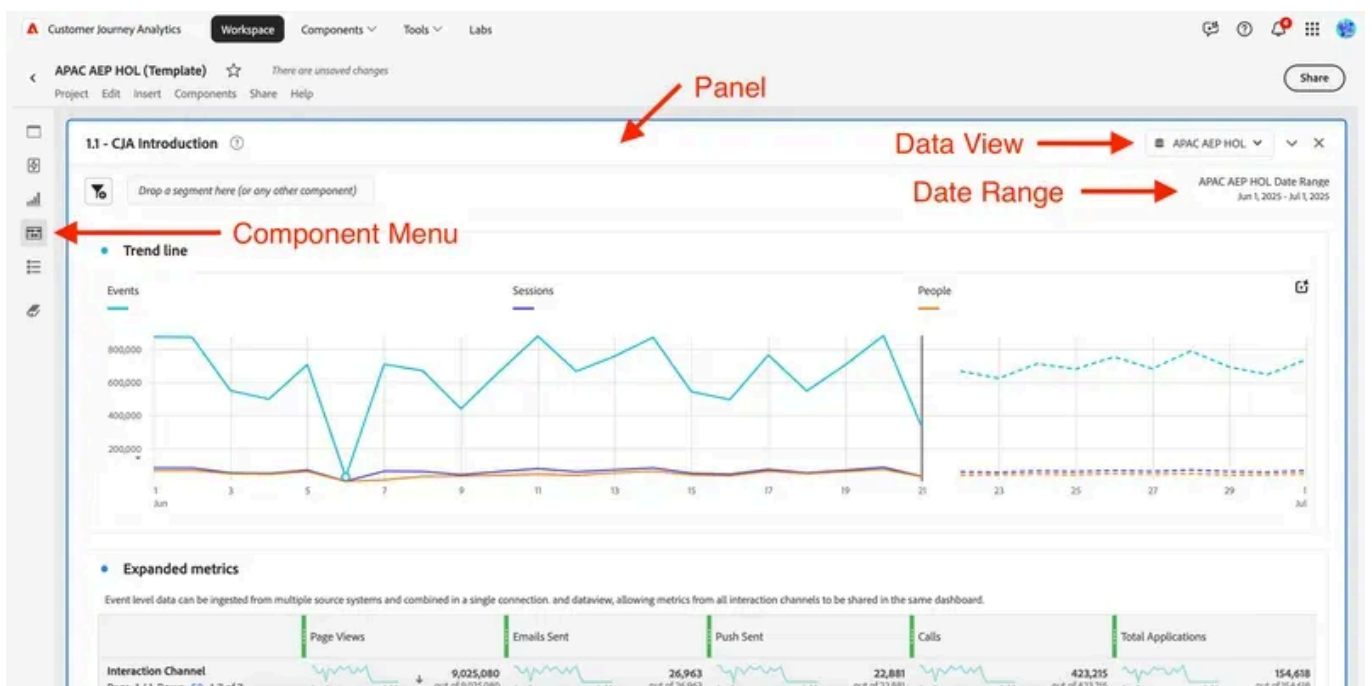
Take note of the following UI components:

Panel - Each dashboard/project is made up of one or more panels

Data View - Controls what data is available to the report - keep in mind this includes multiple datasets that can span multiple channels and data sources.

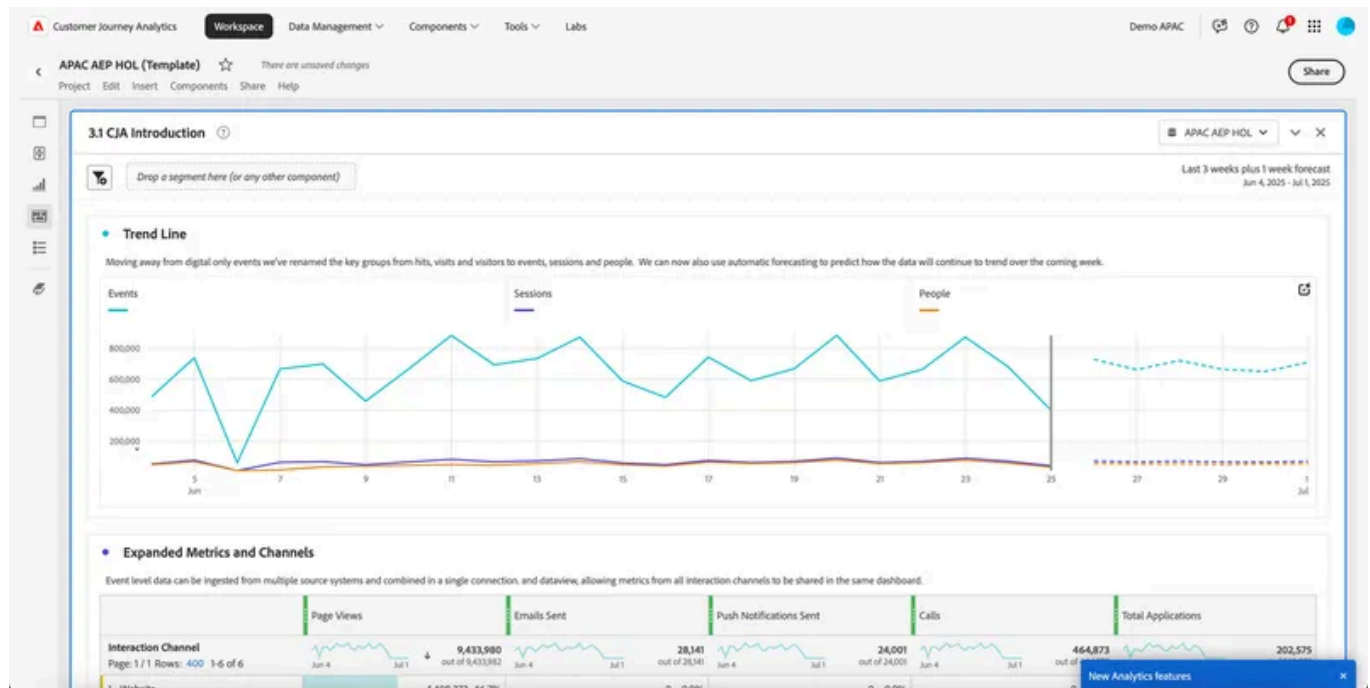
Date Range - The date range controls what data is displayed in the panel

Component Menus - Provides access to add additional visualisations, components and panels to your report.



For this exercise we will walk through the first panel together.

You can see immediately the new primary metrics exposed through CJA: **Events**, **Sessions** and **People**. If you're familiar with Analytics you can think of these as being equivalent to Hits, Visits and Visitors - but remember in Customer Journey Analytics we're grouping data based on a person identifier, not a device (or cookie).



Based on the forward looking date range defined for this panel, Customer Journey Analytics has provided some automatic forecasting to predict how the data will continue to trend over the coming weeks. You can leverage forecasting for:

Planning: By analyzing trends and predicting future outcomes, you can identify potential opportunities and threats and adjust your strategies accordingly.

Budgeting: By forecasting future revenue and expenses, you can ensure that teams have adequate funds to cover their costs and invest in growth opportunities.

Risk management: By anticipating future events and trends, you can take proactive steps to mitigate risks and minimize potential losses.

Resource allocation: By predicting future demand, you can ensure the necessary resources are available to meet customer needs and avoid stock-outs or overstocking.

Performance evaluation: By comparing actual results to forecasted results, you can identify areas for improvement and make necessary adjustments.



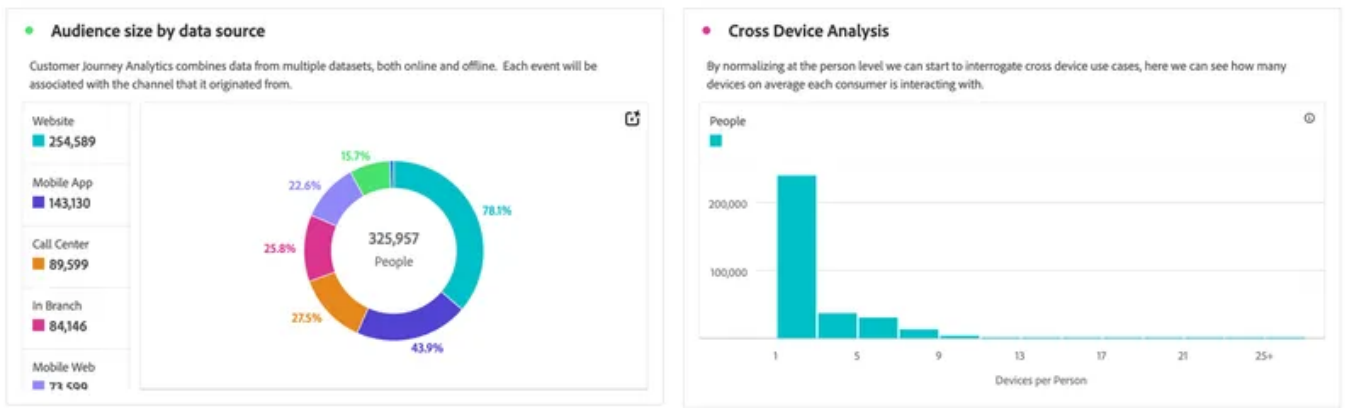
Since the event data ingested to CJA comes from multiple sources not just your website and app we can combine many different types of metrics into the same dashboard. Scroll down to the expanded metrics and you can see some examples of the types of metrics we can include and the source systems or **interaction channels** that these metrics were collected from. Some will be specific per channel, for example the **Calls** metric comes from the **Call Center** dataset, others will be shared across multiple source systems, for example **Total Applications**.

Expanded metrics

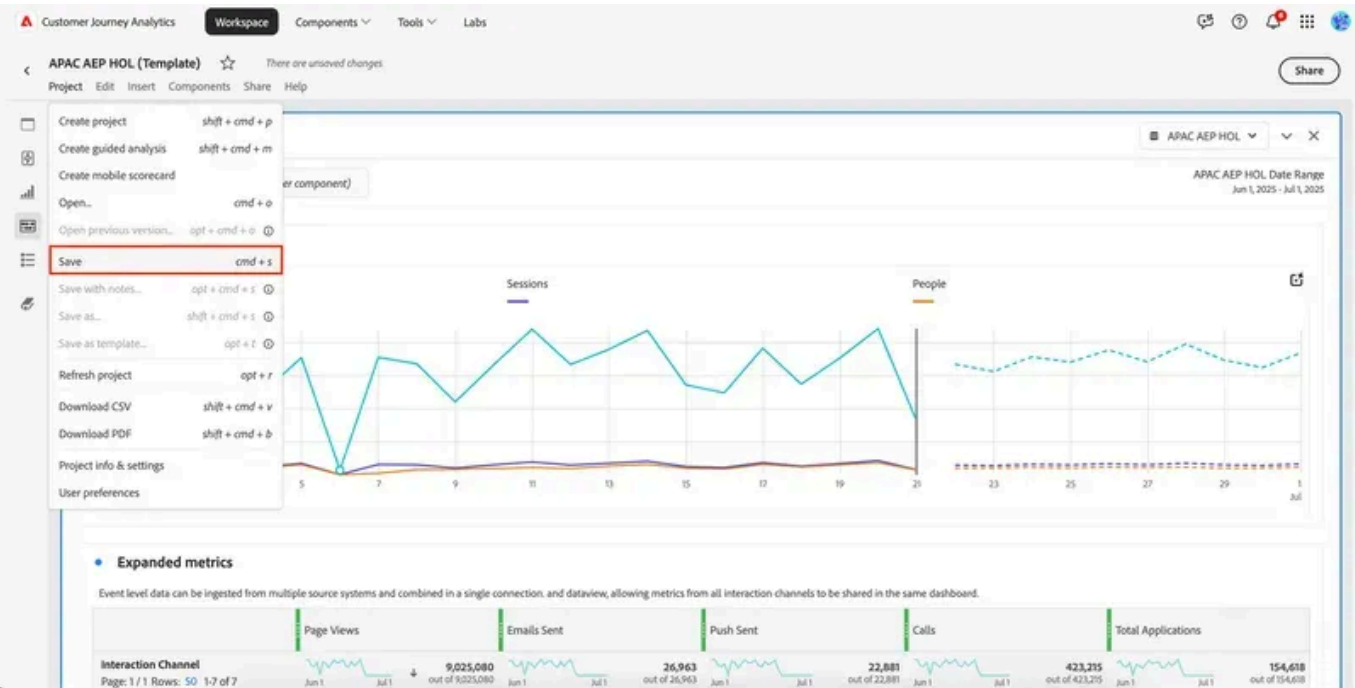
Event level data can be ingested from multiple source systems and combined in a single connection, and dataview, allowing metrics from all interaction channels to be shared in the same dashboard.

	Page Views	Emails Sent	Push Sent	Calls	Total Applications
Interaction Channel	6,381,808 out of 6,381,808	16,962 out of 16,962	14,206 out of 14,206	316,971 out of 316,971	140,623 out of 140,623
Page: 1 / 1 Rows: 50 1-7 of 7	May 1 May 22	May 1 May 22	May 1 May 22	May 1 May 22	May 1 May 22
1. Website	3,078,843 48.2%	0 0.0%	0 0.0%	0 0.0%	26,106 18.6%
2. Mobile App	2,754,055 43.2%	0 0.0%	0 0.0%	0 0.0%	50,928 36.2%
3. Mobile Web	548,908 8.6%	0 0.0%	0 0.0%	0 0.0%	5,744 4.1%
4. No value	2 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
5. Adobe Journey Optimizer	0 0.0%	16,962 100.0%	14,206 100.0%	0 0.0%	0 0.0%
6. Call Center	0 0.0%	0 0.0%	0 0.0%	316,971 100.0%	34,638 24.6%
7. In Branch	0 0.0%	0 0.0%	0 0.0%	0 0.0%	23,207 16.5%

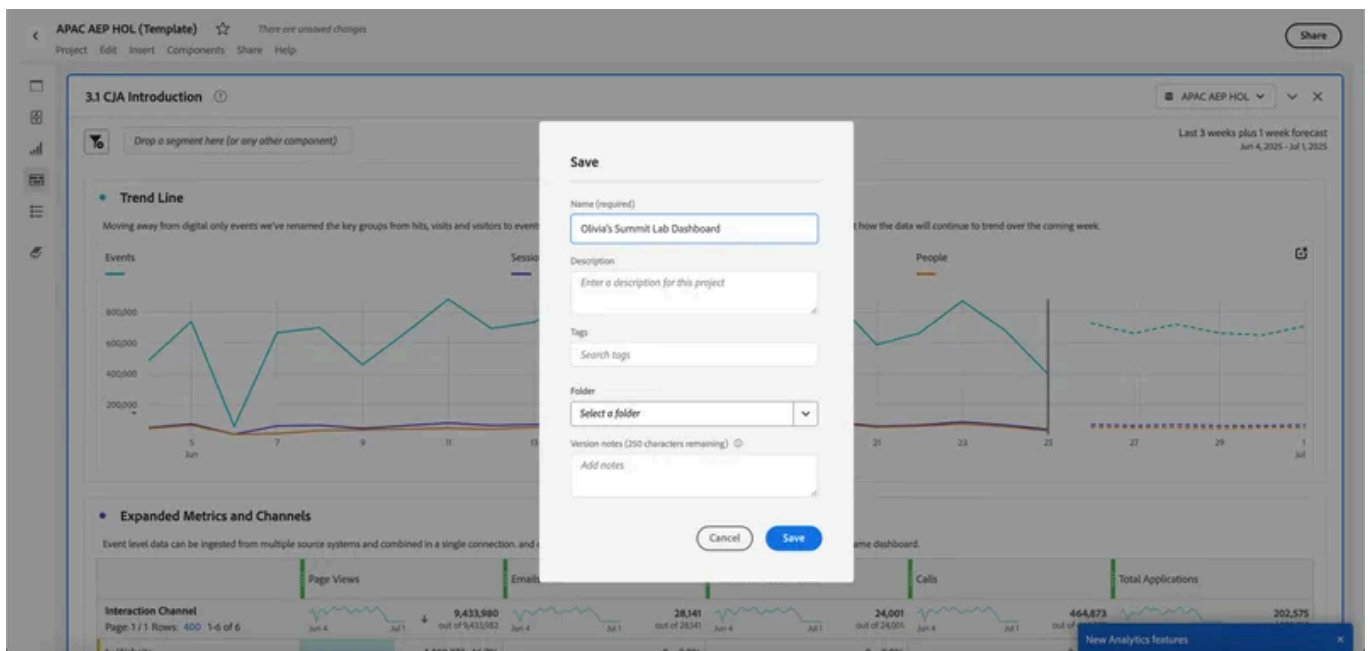
By grouping data at the person level, we can start to analyze things like audience size per channel and devices per person.



Now before we start our adhoc analysis let's save the project. Click on **Project** → **Save**.



Give your project a unique name by including your lab number or name. Then click save.

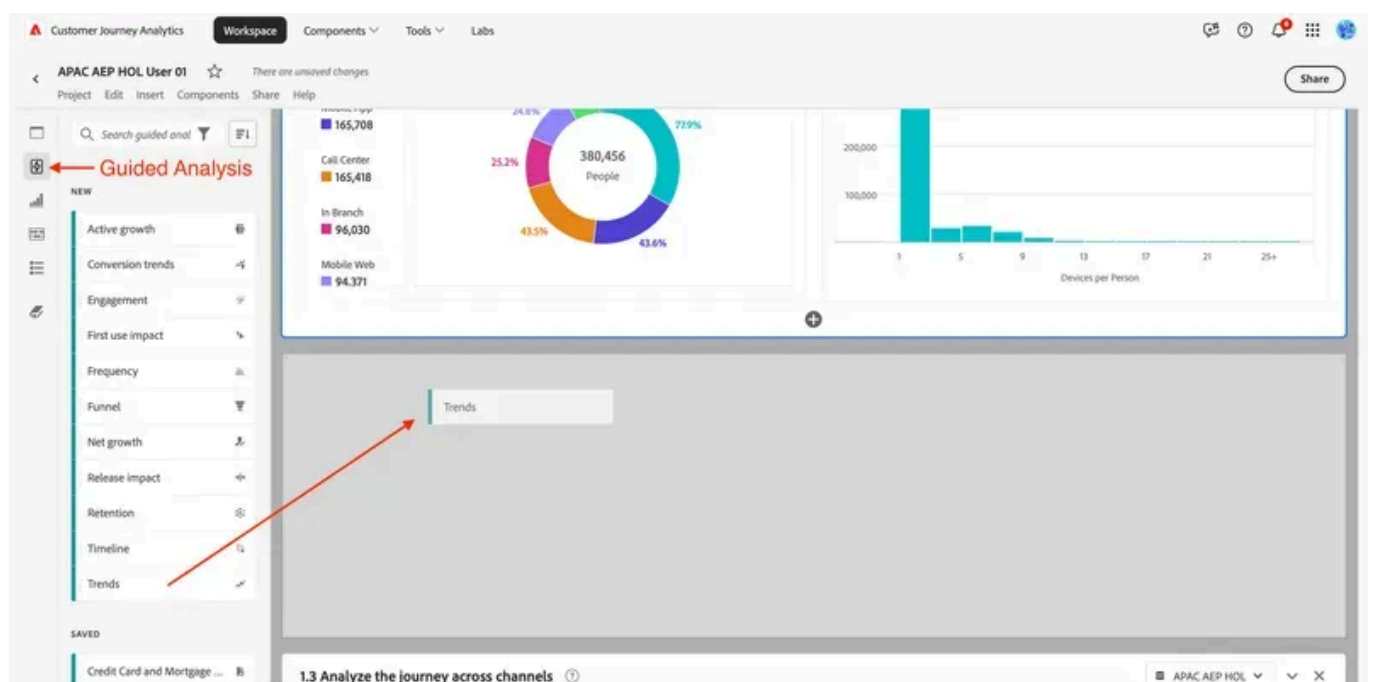


3.2 Guided Analysis

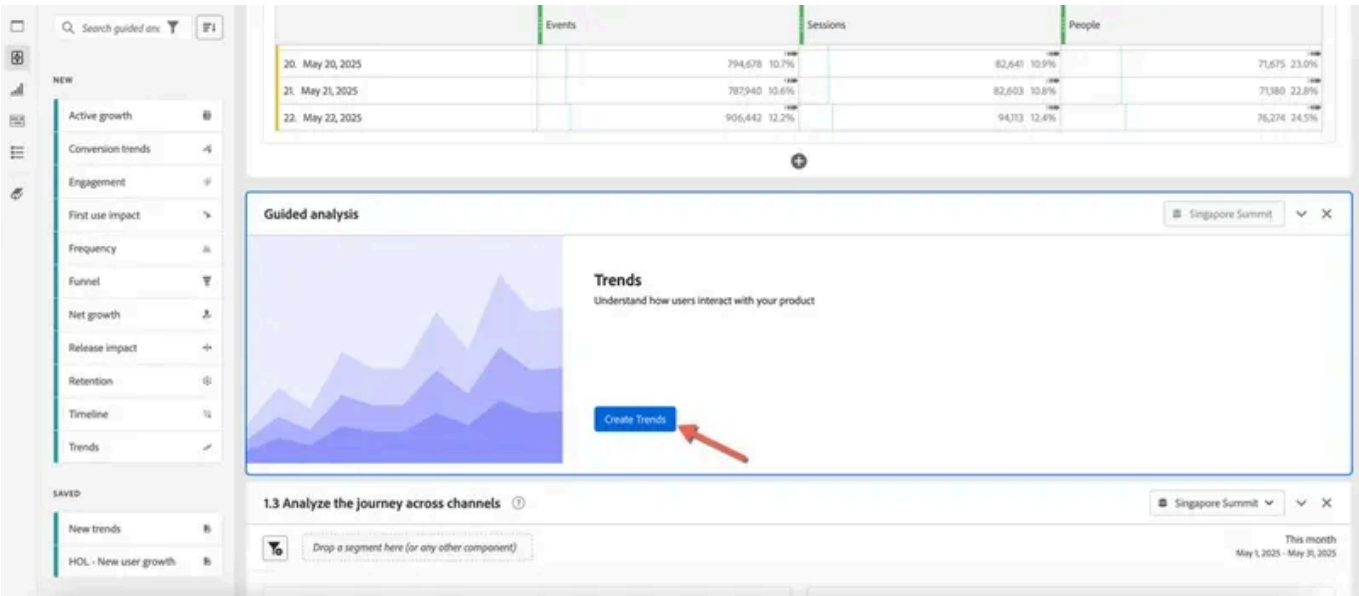
Let's take a look at how SecurFinancials new account applications are trending over the last few months.

We can use one of the new Guided Analysis options to quickly view this and break it down by attributes like the account type, the channel the application was submitted on and/or customer demographics.

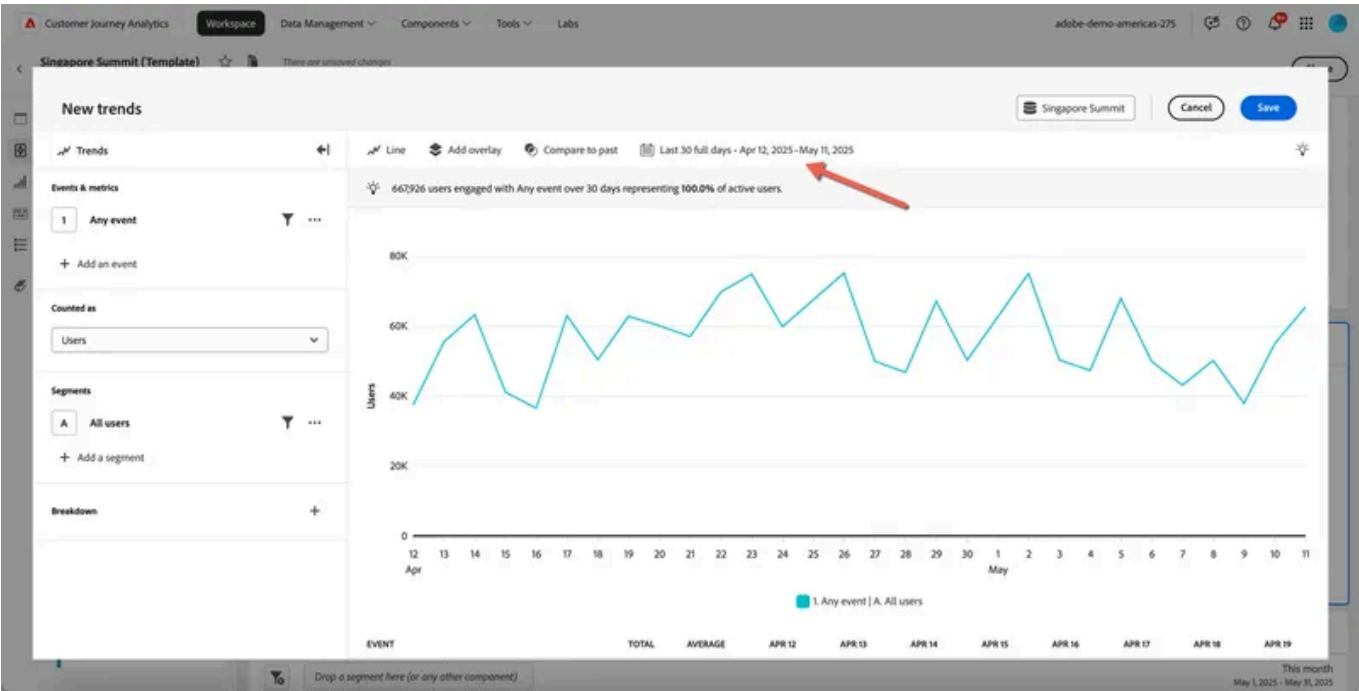
Open the Guided Analysis panel on the left hand side, and drag the **Trends** option into your dashboard under the first panel.



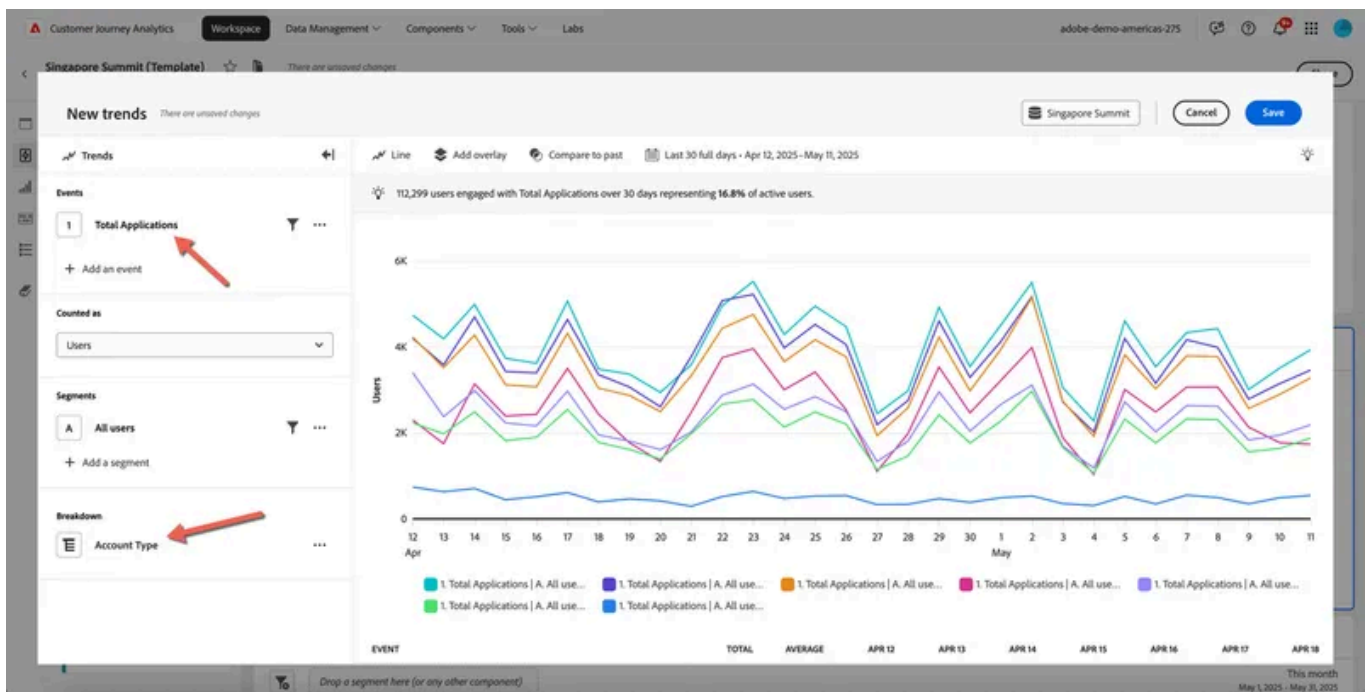
Click to **Create Trends**



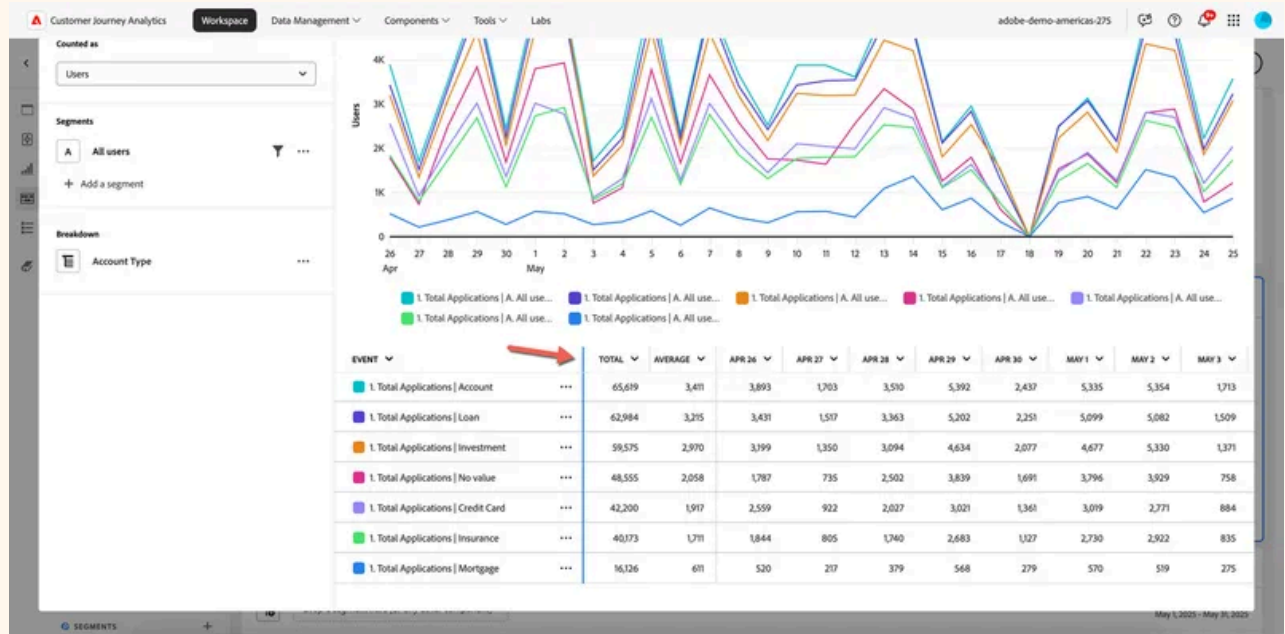
We are immediately shown a quick trend line of all events from the last 30 full days.



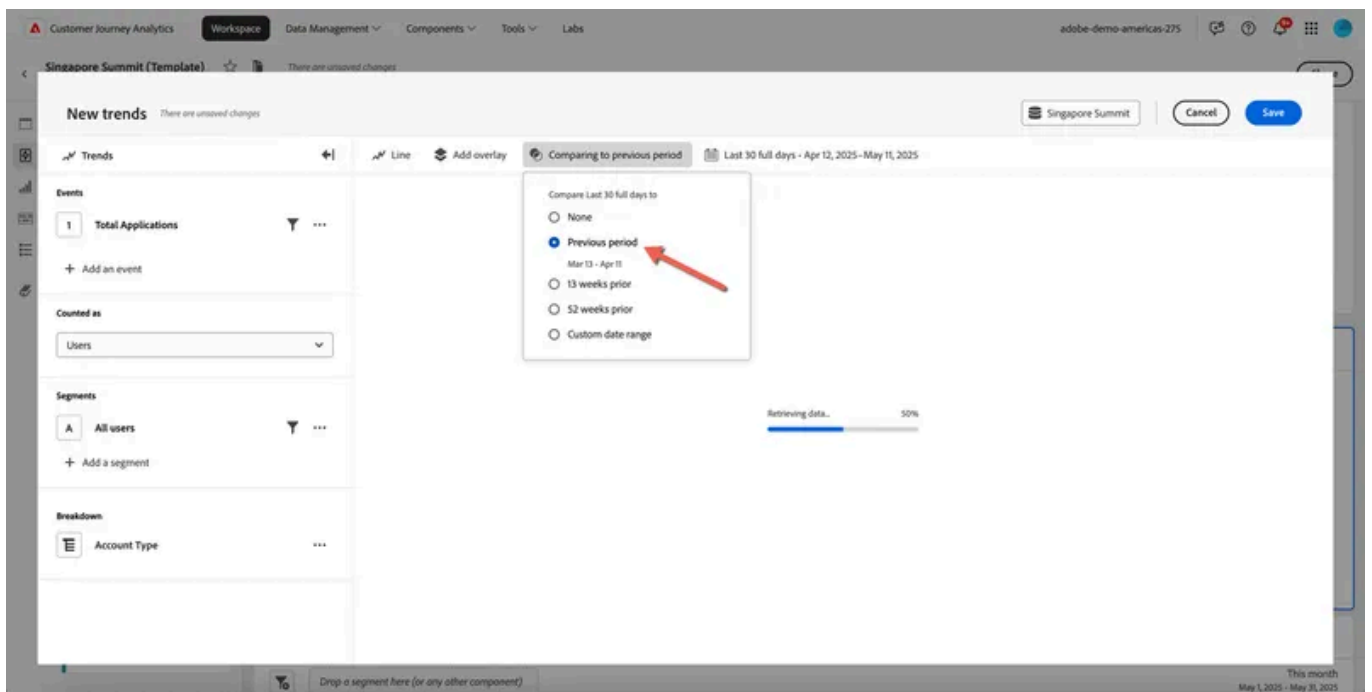
Change the Event that we want to analyse from Any event to **Total Applications** and add a breakdown by **Account Type**.



Top Tip - if you can't see the full event definition in the table, you can widen the column by dragging the column divider in the heading.



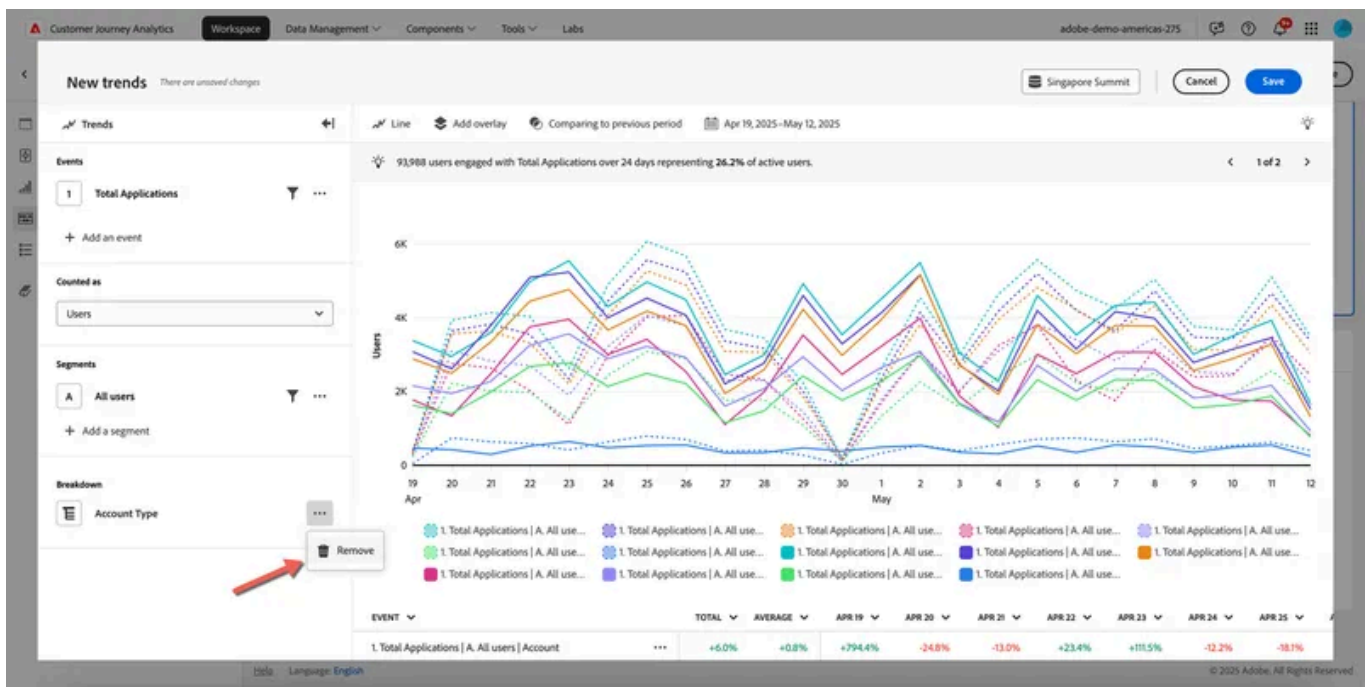
Now let's compare these results to those from last month. Click on **Compare to past** and select **Previous Period**.



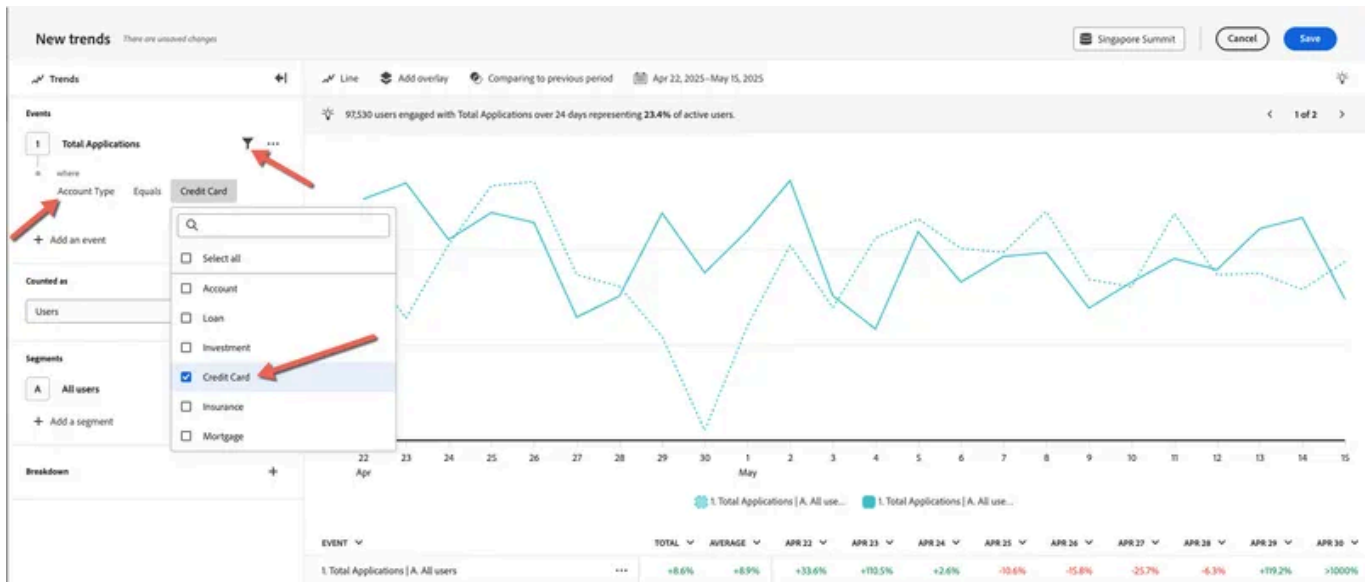
We can see that applications for most account types have seen a small increase month on month, but credit card applications have declined.

	Previous period	Current period	% Change	Previous period	Current period	% Change	Previous period	Current period	% Change	Previous period	Current period	% Change	Previous period	Current period	% Change
1. Total Applications [A. All users] Loan	59,303	69,987	+18.0%	3,021	3,678	+21.7%	5,292	3,771	-28.7%	2,261	5,204	+130.2%	5,329	3,340	-37.3%
Previous period	59,303	69,987	+18.0%	3,021	3,678	+21.7%	5,292	3,771	-28.7%	2,261	5,204	+130.2%	5,329	3,340	-37.3%
Apr 16, 2025 - May 15, 2025	69,987	3,678	-94.7%	3,678	3,771	+2.6%	3,771	5,204	+37.7%	5,204	3,340	-35.8%	3,340	2,230	-33.0%
1. Total Applications [A. All users] Investment	56,392	65,957	+17.0%	2,817	3,364	+19.4%	4,900	2,337	-52.2%	4,954	3,658	-26.3%	0	0	0%
Previous period	56,392	65,957	+17.0%	2,817	3,364	+19.4%	4,900	2,337	-52.2%	4,954	3,658	-26.3%	0	0	0%
Apr 16, 2025 - May 15, 2025	65,957	3,364	-94.9%	3,364	3,364	0%	2,068	3,199	+55.1%	2,138	3,805	+77.0%	4,607	4,707	+2.2%
1. Total Applications [A. All users] No value	48,291	51,067	+5.8%	2,091	2,893	+38.4%	4,332	1,733	-59.8%	3,989	2,922	-26.5%	0	0	0%
Previous period	48,291	51,067	+5.8%	2,091	2,893	+38.4%	4,332	1,733	-59.8%	3,989	2,922	-26.5%	0	0	0%
Apr 16, 2025 - May 15, 2025	51,067	2,893	-94.3%	2,893	2,893	0%	1,631	1,713	+5.0%	1,713	3,047	+77.8%	3,868	3,825	-1.1%
1. Total Applications [A. All users] Credit Card	48,066	46,856	-2.5%	2,215	2,150	-3.0%	3,850	1,643	-57.2%	3,844	2,358	-38.9%	0	0	0%
Previous period	48,066	46,856	-2.5%	2,215	2,150	-3.0%	3,850	1,643	-57.2%	3,844	2,358	-38.9%	0	0	0%
Apr 16, 2025 - May 15, 2025	46,856	2,150	-95.5%	2,150	2,150	0%	2,882	2,886	+0.1%	1,260	1,978	+57.0%	1,371	2,038	+48.6%
1. Total Applications [A. All users] Insurance	38,831	44,935	+15.7%	1,670	1,935	+15.9%	2,998	2,388	-20.3%	2,999	1,753	-41.6%	0	0	0%
Previous period	38,831	44,935	+15.7%	1,670	1,935	+15.9%	2,998	2,388	-20.3%	2,999	1,753	-41.6%	0	0	0%
Apr 16, 2025 - May 15, 2025	44,935	1,935	-95.7%	1,935	1,935	0%	2,674	1,168	-56.3%	1,753	1,348	-23.1%	2,298	2,680	+16.6%
1. Total Applications [A. All users] Mortgage	11,833	14,288	+20.7%	423	515	+21.7%	652	266	-59.2%	595	299	-49.7%	0	0	0%
Previous period	11,833	14,288	+20.7%	423	515	+21.7%	652	266	-59.2%	595	299	-49.7%	0	0	0%
Apr 16, 2025 - May 15, 2025	14,288	515	-96.4%	515	515	0%	584	629	+7.7%	288	525	+82.3%	356	279	-21.6%

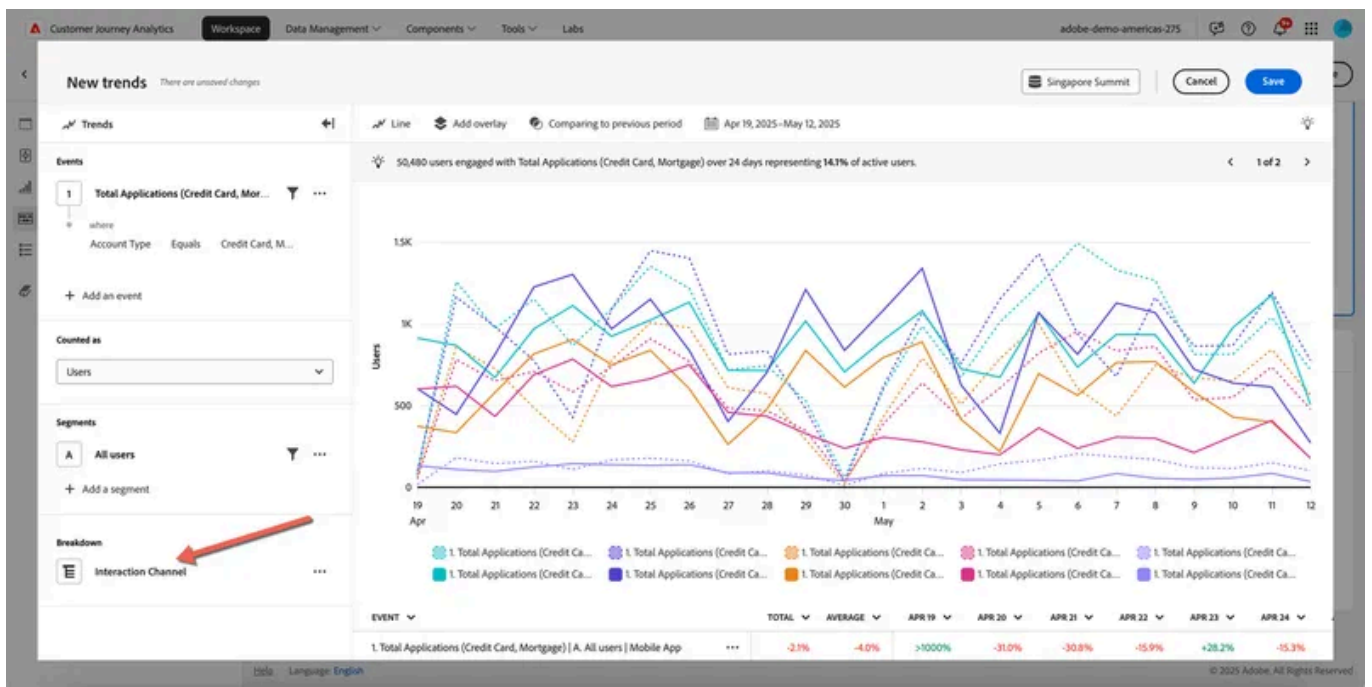
Let's zoom in on this account type and see what other insights we can find. Remove the breakdown by Account Type.



Now add a filter on our events to include only credit card applications.



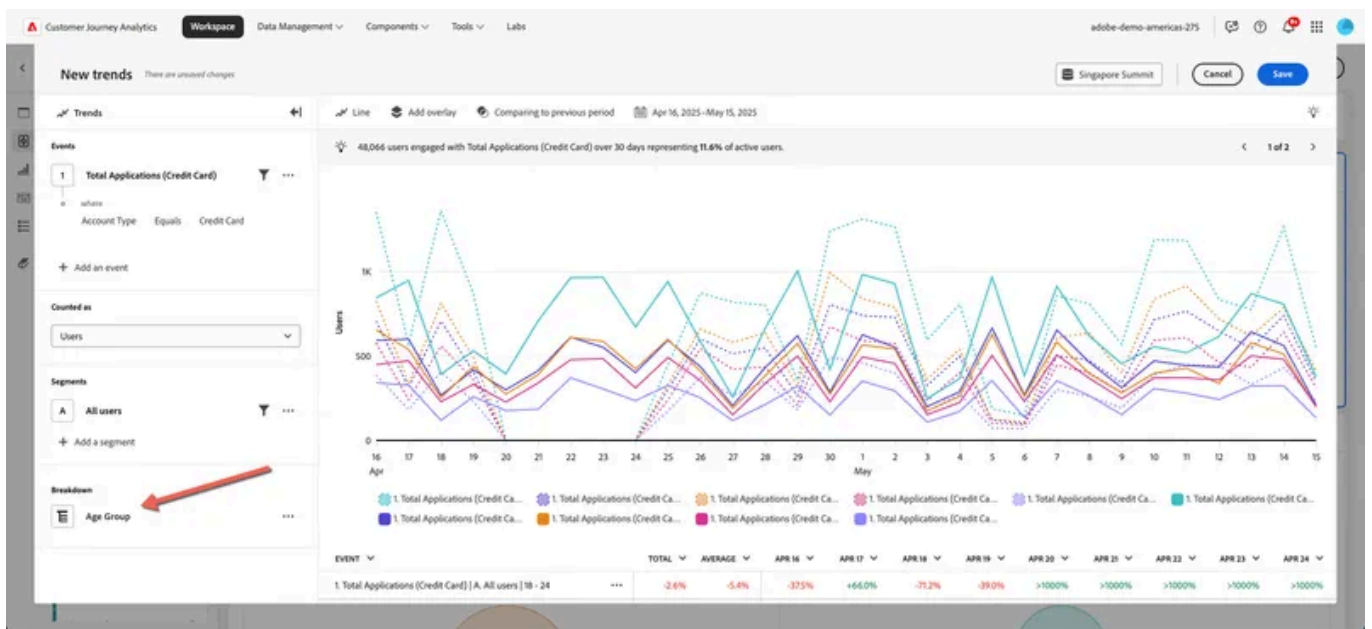
Let's break it down now by interaction channel.



We can see that Call Center and In Branch applications have increased. Perhaps there is some friction on digital channels (web, mobile, mobile web) which is driving customers to the call center and/or in branch?

EVENT	TOTAL	AVERAGE	MAY 27	MAY 28	MAY 29	MAY 30	MAY 31	JUN 1	JUN 2
1. Total Applications (Credit Card) A. All users No value	-12.6%	-13.5%	+83.3%	-20.2%	-23.0%	-32.2%	-37.6%	-45.6%	+8.3%
Previous period	8,671	355	258	312	496	398	436	562	345
Last 30 full days	7,581	307	473	249	382	270	272	306	373
1. Total Applications (Credit Card) A. All users 18 to 25	-18.6%	-21.5%	+113.1%	-17.9%	-30.6%	-24.7%	-50.0%	-51.4%	+26.6%
Previous period	5,386	233	176	173	343	227	280	346	173
Last 30 full days	4,385	183	375	142	238	171	140	168	219
1. Total Applications (Credit Card) A. All users 55 to 65	-8.2%	-8.1%	+101.6%	-8.2%	-23.9%	-1.3%	-17.6%	-18.4%	+3.3%
Previous period	3,721	161	125	134	213	153	159	207	161
Last 30 full days	3,415	148	252	123	162	151	131	169	166
1. Total Applications (Credit Card) A. All users 40 to 55	-9.3%	-11.2%	+54.6%	+2.0%	-26.4%	-2.3%	-29.0%	-24.9%	+20.0%
Previous period	3,168	134	130	100	163	132	155	185	110
Last 30 full days	2,872	119	201	102	120	129	110	139	132
1. Total Applications (Credit Card) A. All users 30 to 40	-25.1%	-27.7%	+40.5%	-29.6%	-29.0%	-28.9%	-45.3%	-28.2%	+19.4%
Previous period	3,677	159	153	135	186	159	170	206	129
Last 30 full days	2,754	115	215	95	132	113	93	148	154
1. Total Applications (Credit Card) A. All users 25 to 30	-21.0%	-21.7%	+93.1%	-32.3%	-38.1%	-25.4%	-43.5%	-22.0%	+7.8%
Previous period	2,431	106	87	99	139	118	115	132	90
Last 30 full days	1,921	83	168	67	86	88	65	103	97

Now let's use some profile information to analyse it further, change the breakdown from Interaction Channel to Age Group.

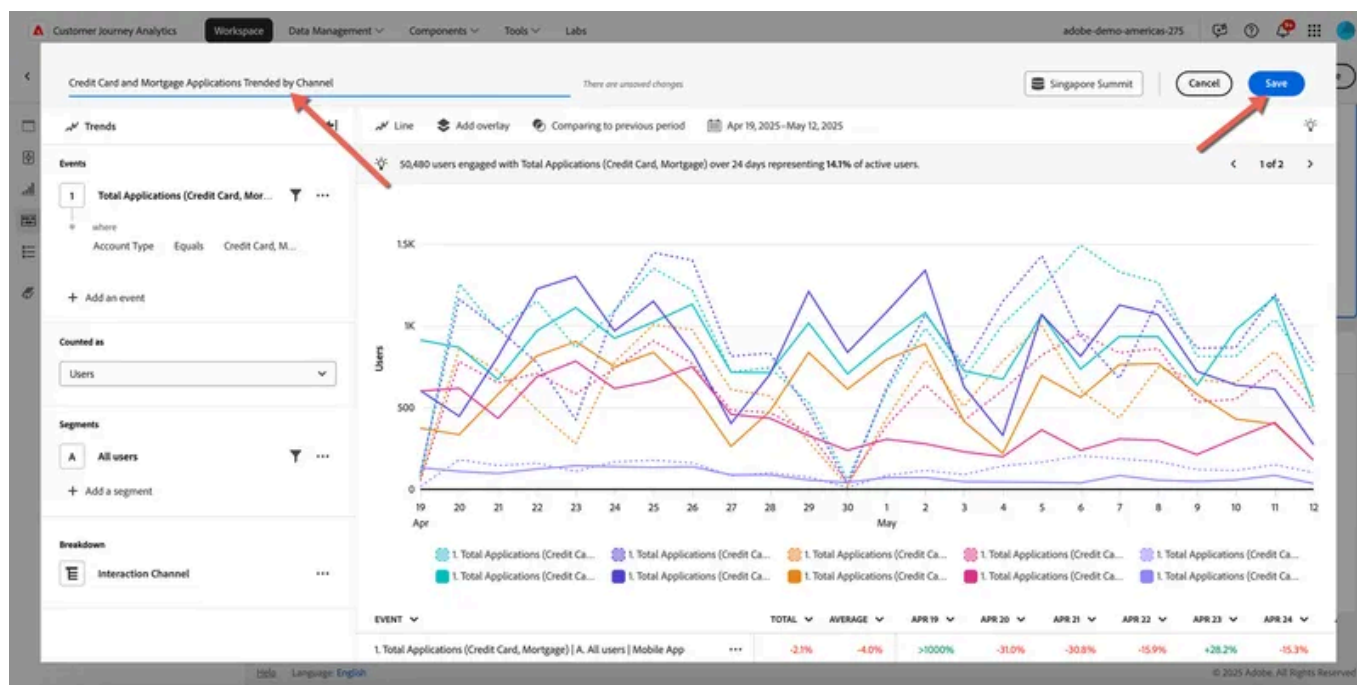


We can see that the younger age groups 18-24 and 25-34 are not performing quite as well as the other age groups. Could this be a sign that more personalised messaging is required for the younger age groups?

The screenshot displays a detailed table of 'Total Applications (Credit Card)' data, broken down by age group and date. The table includes columns for 'EVENT', 'TOTAL', 'AVERAGE', and daily data from April 16 to April 24, 2025. The data is organized into sections for different age groups: 18-24, 45-60, 25-34, and 35-44. Each section includes a 'Previous period' row and a 'Apr 16, 2025-May 15, 2025' row.

EVENT	TOTAL	AVERAGE	APR 16	APR 17	APR 18	APR 19	APR 20	APR 21	APR 22	APR 23	APR 24
1. Total Applications (Credit Card) A. All users 18 - 24	---	-2.6%	-5.4%	-37.5%	+66.0%	-71.2%	-39.0%	>1000%	>1000%	>1000%	>1000%
Previous period	15,605	701	1,353	571	1,341	870	0	0	0	0	0
Apr 16, 2025-May 15, 2025	15,200	663	845	948	392	531	394	709	964	966	672
1. Total Applications (Credit Card) A. All users 45 - 60	---	+5.8%	+6.1%	-56.1%	+91.3%	-62.1%	+2.7%	>1000%	>1000%	>1000%	>1000%
Previous period	9,185	425	707	314	707	407	0	0	0	0	0
Apr 16, 2025-May 15, 2025	9,714	451	593	600	268	418	300	413	612	552	402
1. Total Applications (Credit Card) A. All users 25 - 34	---	-15.0%	-13.1%	-20.7%	+60.9%	-69.0%	-10.6%	>1000%	>1000%	>1000%	>1000%
Previous period	10,346	489	826	335	812	490	0	0	0	0	0
Apr 16, 2025-May 15, 2025	8,706	425	655	539	252	438	274	390	610	587	424
1. Total Applications (Credit Card) A. All users 60+	---	+3.7%	+4.0%	-22.3%	+95.9%	-59.0%	-7.8%	>1000%	>1000%	>1000%	>1000%
Previous period	7,408	348	578	241	559	360	0	0	0	0	0
Apr 16, 2025-May 15, 2025	7,685	362	449	472	229	332	227	341	478	484	311
1. Total Applications (Credit Card) A. All users 35 - 44	---	-6.6%	-6.6%	-15.9%	+79.7%	-70.7%	+12.1%	>1000%	>1000%	>1000%	>1000%
Previous period	5,714	251	387	182	406	231	0	0	0	0	0
Apr 16, 2025-May 15, 2025	5,679	250	341	327	119	259	176	185	371	305	235

Update the name of your analysis and click save. We'll continue to analyze the journey customers are having across channels in the next exercise.



Insights Unlocked!

- Credit Card Applications are trending down month on month
- Website channel across desktop and mobile is performing worse than other channels
- The issue seems to be impacting younger applicants between the age of 18 and 34.

Hypothesis:

- Customers seem to be getting stuck during the application process and are either dropping off or transferring to offline channels.

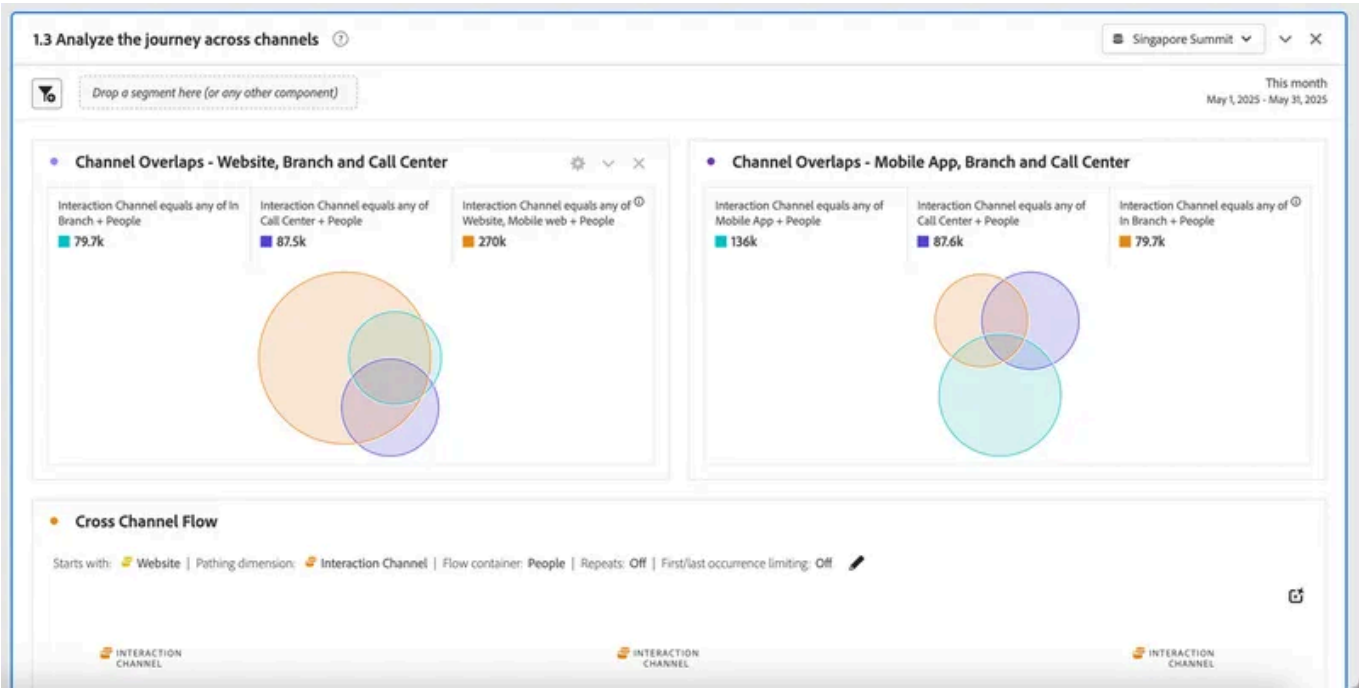
3.3 Analyzing the Journey

Now that we've generated some quick insights through the guided analysis, let's validate our hypothesis through some cross channel journey analysis.

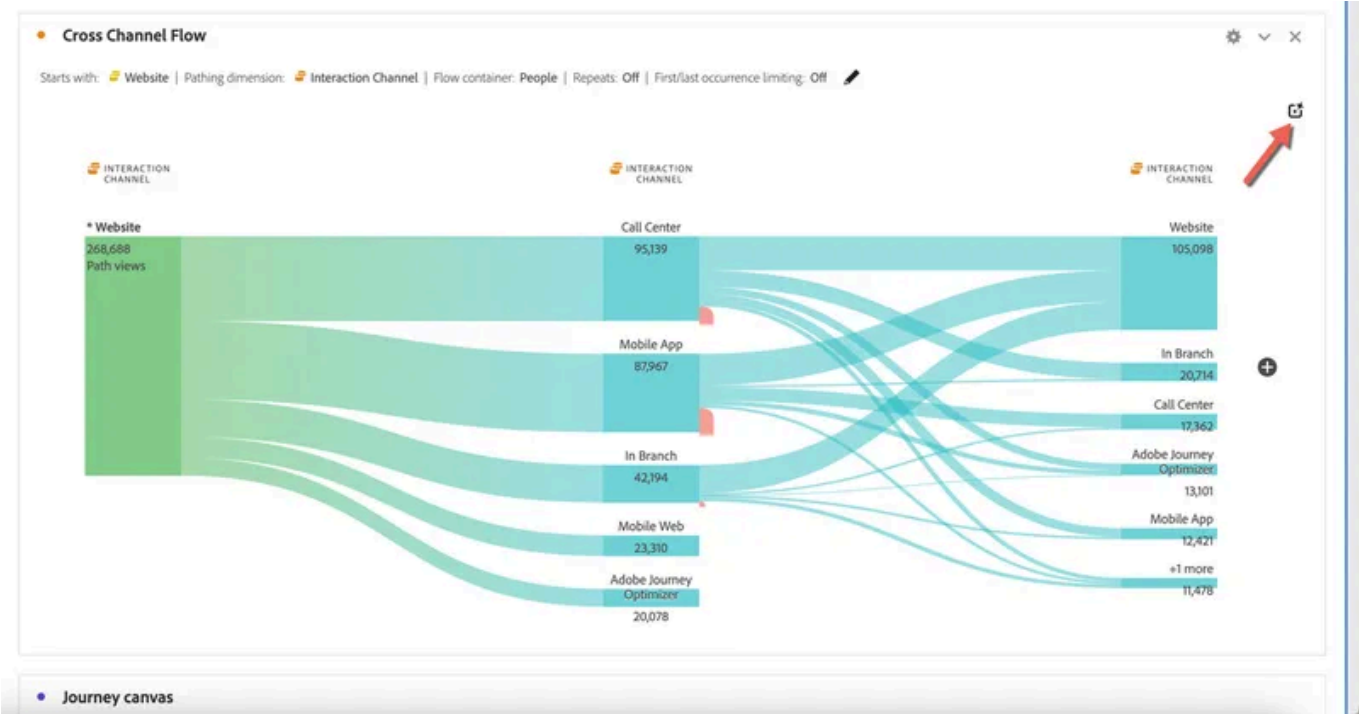
Scroll down to the panel labeled **1.3 Analyze the journey across channels**.

Here we can see the overlap of people interacting across channels. The **Channel Overlap** venn diagrams show the overlap of customers engaging on the website AND the call

center or in branch is much higher than those who engage on the mobile app.



Looking at the **Cross Channel Flow** we can see the common path customers are taking after landing on the website. We can see a good portion of customers are calling the call center after visiting the website. Click the intelligent captions icon in the top right to use generative AI to get a quick summary of the key insights from this visualisation.



Intelligent Captions provide high level takeaways allowing you to share your findings easily with other users. Use the arrow icons on the right to expand and collapse the captions.



Intelligent captions: Flow

Most common flow: The most popular flow was "Website" -> "Call Center" -> "Website", representing 38,337 (14.27%) "People".

Top landing: "Call Center" is the top entry point with 95,139 (35.41%) "People". Following "Call Center", "Website" emerges as the leading subsequence with 38,337 (40.30%) "People".

Secondary landing: "Mobile App" has a similar high landing rate compared to the top landing node, accounting for 87,967 (32.74%) "People".

Top retention: In Branch exhibits the highest retention, with an average of 96.67% "People" advancing to the next step.

The flow visualisation is great for high level analysis but CJA's journey canvas allows us to drill into exactly which paths customers are taking and where they are falling out of the expected trajectory.

Scroll down to the **Credit Card Application Journey Canvas**. It has been prepopulated to show the expected journey from viewing the credit card page on the website to completing an online application.

Credit Card Application Journey

Primary Metric: People | Secondary Metric: Total Applications | Container: Session

Percentage value

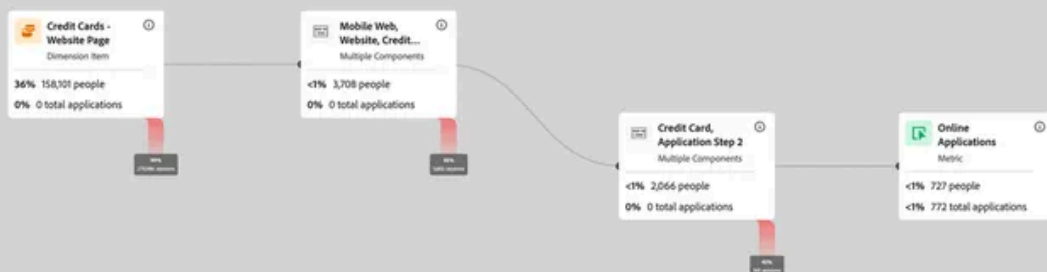
Arrow settings

Percent of total

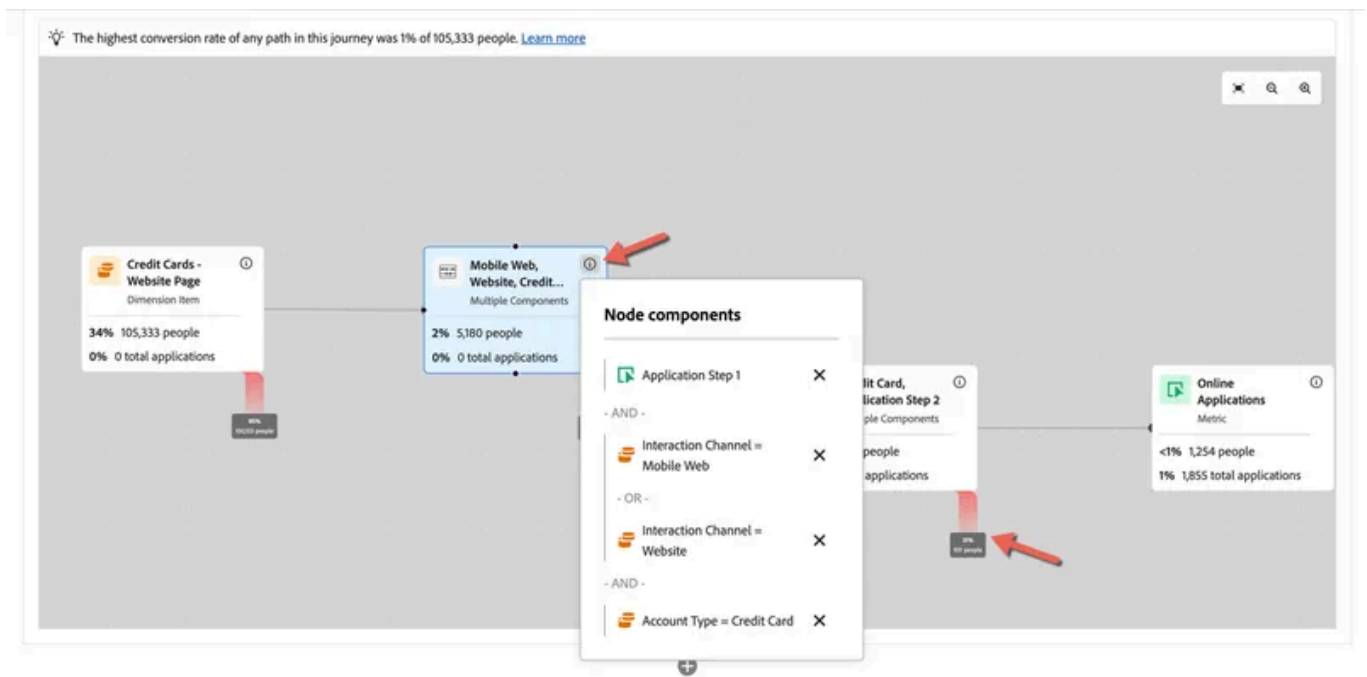
Labels only

Show fallout

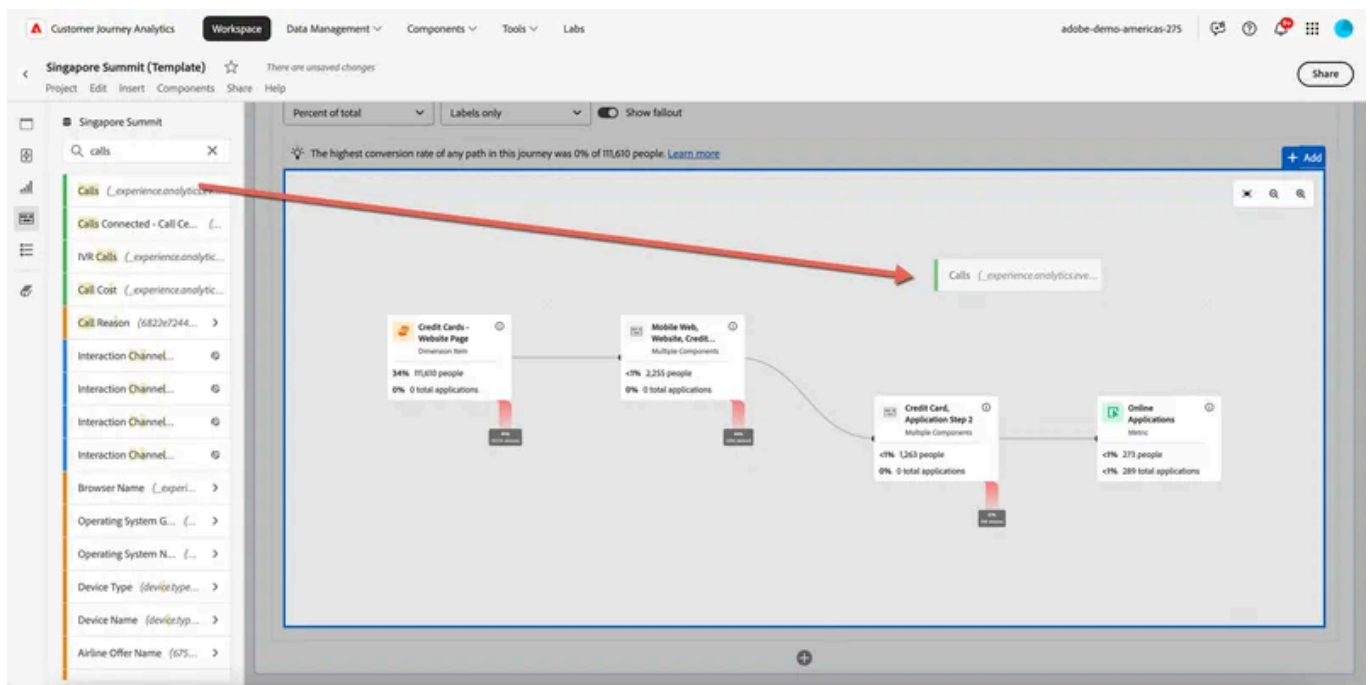
The highest conversion rate of any path in this journey was 0% of 158,101 people. [Learn more](#)



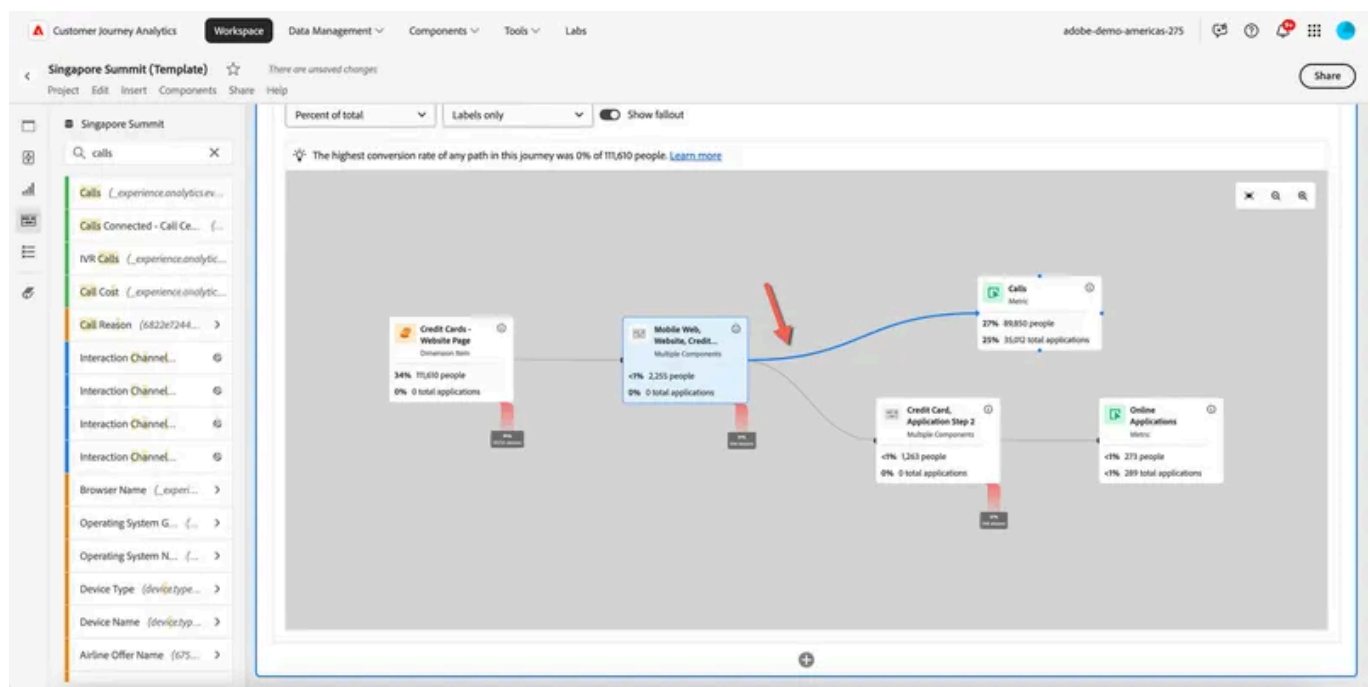
Click on the **i** icon in the node to see the components that make it up. The red line shows the fall out between each node.



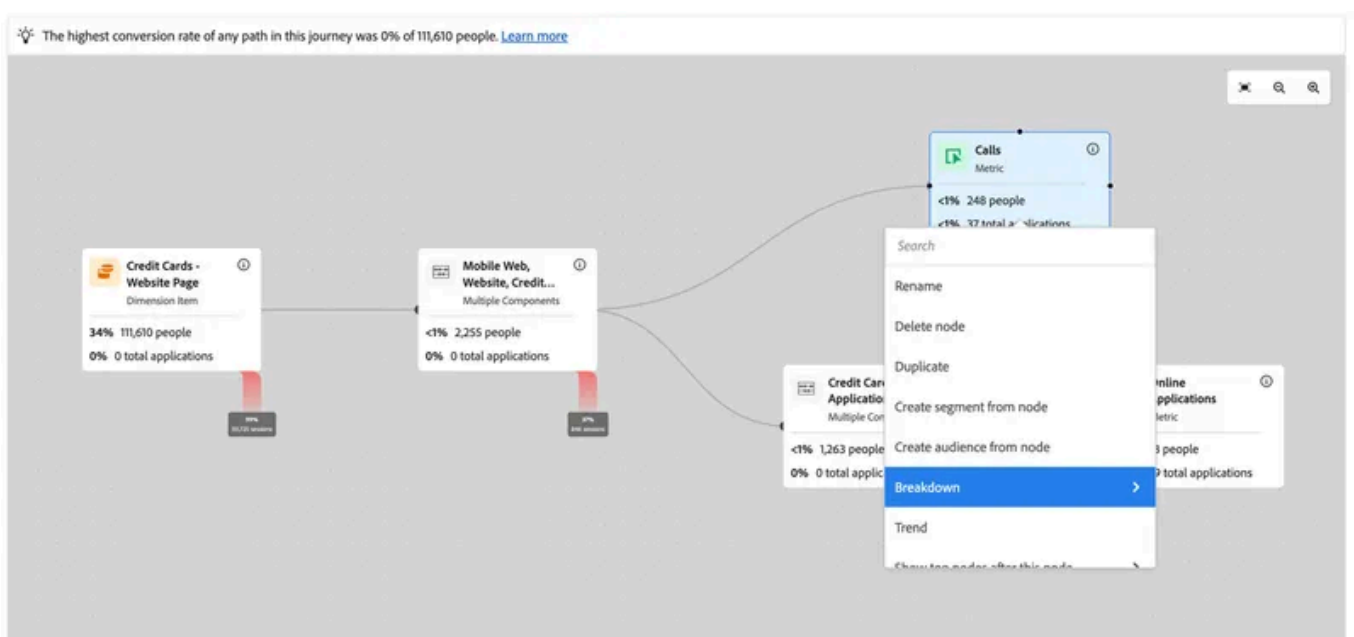
Let's add to the journey to see the number of people who make a call to the call center after starting the application process. Search for **Calls** in the components menu and drag the **Calls** metric onto journey canvas.



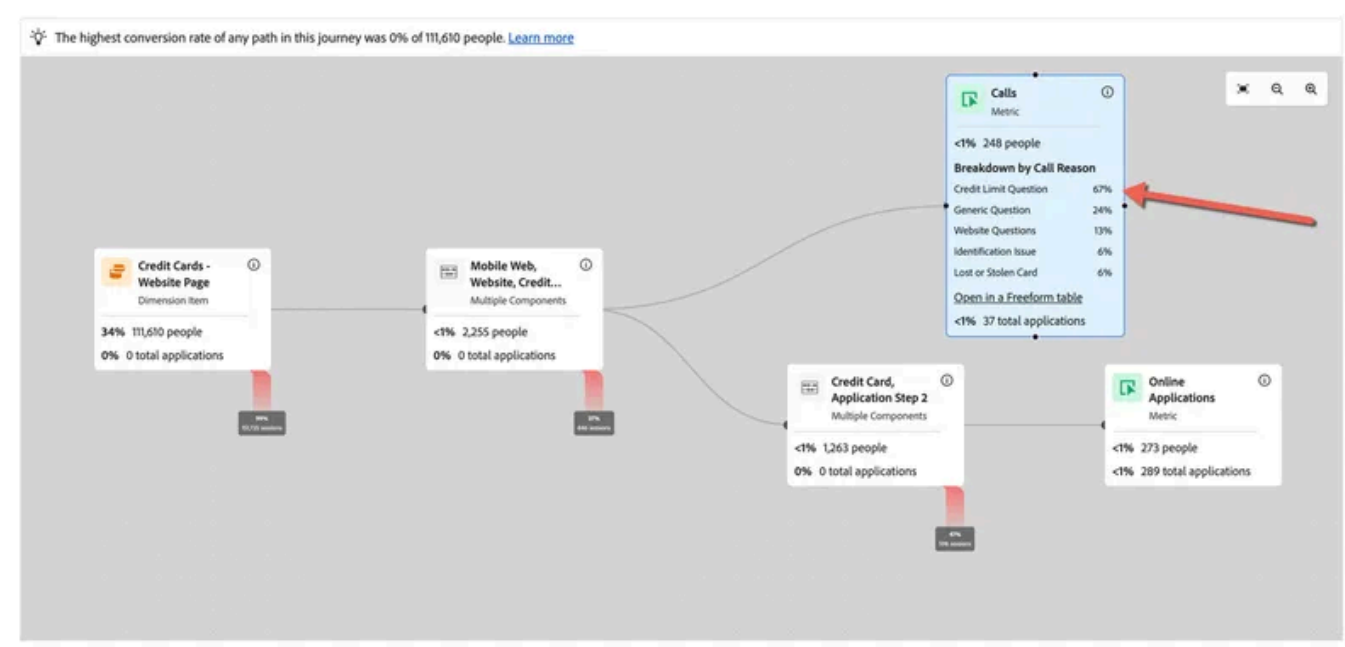
Now drag a connector from Credit Card Application Step 1 node to the Calls metric node.



We can further breakdown the Calls node to understand what the reason was for the call. Right click on the Calls node and select to **Breakdown → In Journey Canvas** by **Call Reason**.



We can see that the largest proportion of calls are related to questions around credit limits!



With this kind of visualisation we can run deep analysis of fallout and fallthrough that accommodates the most complex of user journeys crossing any number of channels, dimensions and metrics.

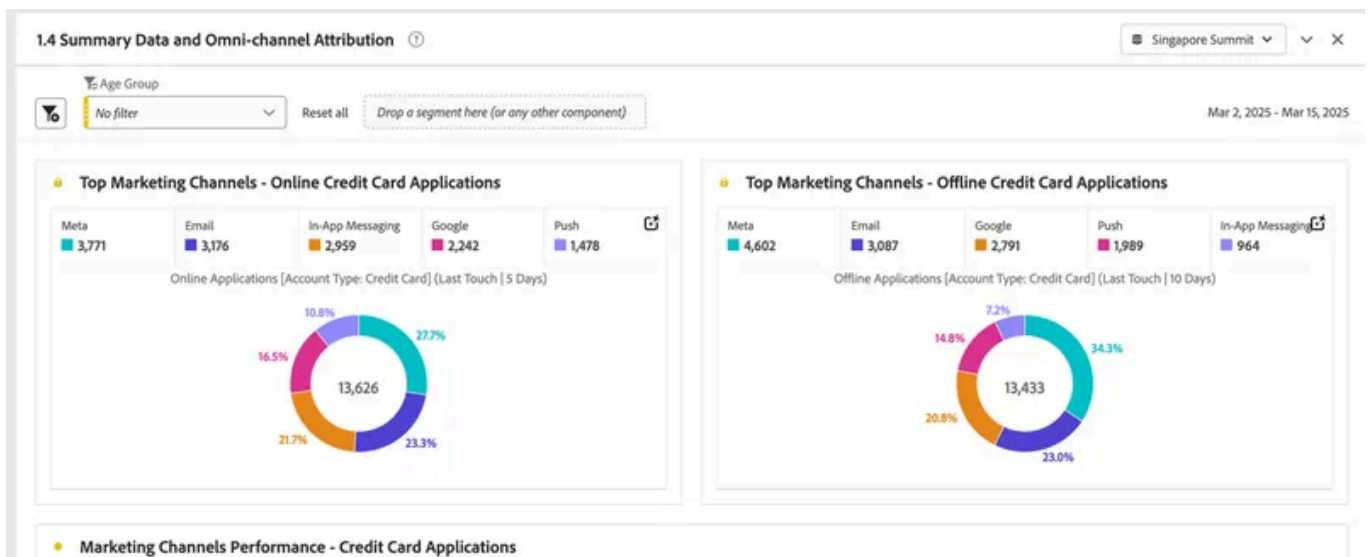
Insights Unlocked!

- We've confirmed that customers are diverting from online credit card applications to offline channels, in particular the call center
- The most common reason for these calls revolve around credit limits

3.4 Omni-channel Attribution

Let's take a quick look now at the marketing channels which have had the most impact historically on Credit Card Applications to provide insight on where we should focus our upcoming marketing effort and budget.

Scroll down to the last panel in your dashboard. We can see here a quick visualisation to show the top performing channels for both online and offline applications.



If you scroll down to the data table which enables these visualisations, you can see we also have summary data from Meta and Google to understand how many impressions, clicks and the cost for these paid channels for the reporting period. This data is collected as daily aggregates and can be tied to the person level event metrics through shared Campaign Id's collected when a customer clicks through from an Ad.

With this summary level data we can start to report on advertising metrics like cost per click, return on ad spend and cost per aquisition across not only online but offline channels as well.

Marketing Channels Performance - Credit Card Applications									
	Ad Impressions (Summary)		Ad Clicks (Summary)		Ad Cost (Summary)		Cost Per Click (CPC)		Online Applications Last Touch 5 Days Credit Card
									Offline Applications Last Touch 10 Days Credit Card
New Marketing Channels Page: 1 / 1 Rows: 400 1-12 of 12									
	Mar 2	48,341 out of 48,361	Mar 2	37,300 out of 37,316	Mar 2	6,747 SGD out of 6,750 SGD	Mar 2	0.18 SGD out of 0.18 SGD	Last Touch 5 Days Mar 2 15,767 out of 17,787
									Last Touch 10 Days Mar 2 16,554 out of 20,343
1. Meta		47,887 99.1%		36,944 99.0%		6,684 SGD 99.1%		0.18 SGD 100.0%	3,771 23.9%
2. Email		0 0.0%		0 0.0%		0 SGD 0.0%		Invalid	3,087 18.6%
3. In-App Messaging		0 0.0%		0 0.0%		0 SGD 0.0%		Invalid	964 5.8%
4. Google		454 0.9%		356 1.0%		64 SGD 0.9%		0.18 SGD 99.2%	2,791 16.9%
5. Push		0 0.0%		0 0.0%		0 SGD 0.0%		Invalid	1,989 12.0%
6. Paid Search		0 0.0%		0 0.0%		0 SGD 0.0%		Invalid	1,543 9.3%
7. Natural Search		0 0.0%		0 0.0%		0 SGD 0.0%		Invalid	387 2.3%
8. Tiktok		0 0.0%		0 0.0%		0 SGD 0.0%		Invalid	369 2.2%
9. Television		0 0.0%		0 0.0%		0 SGD 0.0%		Invalid	318 1.9%
10. Print		0 0.0%		0 0.0%		0 SGD 0.0%		Invalid	198 1.2%
11. Direct Mail		0 0.0%		0 0.0%		0 SGD 0.0%		Invalid	180 1.1%
12. Social Referrals		0 0.0%		0 0.0%		0 SGD 0.0%		Invalid	126 0.8%

For the purpose of this exercise we've used different attribution for online applications (last touch within 5 days) vs offline applications (last touch within 10 days). You can easily update the attribution model used depending on your organisations needs by right clicking on the column heading and selecting modify attribution model.

Marketing Channels Performance - Credit Card Applications

	Ad Impressions (Summary)	Ad Clicks (Summary)	Ad Cost (Summary)	Cost Per Click (CPC)	Online Applications Last Touch 5 Days	Offline Applications Last Touch 10 Days
New Marketing Channels Page: 1 / 1 Rows: 400 1-12 of 12	48,341 out of 48,361	37,300 out of 37,316	6,747 SGD out of 6,750 SGD	0.18 SGD	15,767 out of 12,787	16,554 out of 20,343
1. Meta	47,887 99.1%	36,944 99.0%	6,684 SGD 99.1%	0.18 SGD	3,771 23.9%	4,602 27.8%
2. Email	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	3,087 18.6%
3. In-App Messaging	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	964 5.8%
4. Google	454 0.9%	356 1.0%	64 SGD 0.9%	0.18 SGD	2,242 14.2%	2,791 16.9%
5. Push	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	1,989 12.0%
6. Paid Search	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	1,543 9.3%
7. Natural Search	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	387 2.3%
8. Tiktok	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	369 2.2%
9. Television	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	220 1.4%
10. Print	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	111 0.7%
11. Direct Mail	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	103 0.7%
12. Social Referrals	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	100 0.6%

- Search
- Create metric from selection
- Copy selection to clipboard
- Download items as CSV (New Marketing C...
- Add time period column
- Compare time periods
- Download selection as CSV
- Modify attribution model

You can choose from any of the supported models including Adobe's algorithmic model which uses AI/ML to allocate multi-touch attribution across channels.

Marketing Channels Performance - Credit Card Applications

Column attribution model

Model: Last Touch

- Last Touch
- First Touch
- Linear
- Participation
- Same Touch
- U Shaped
- J Curve
- Inverse J
- Time Decay
- Custom
- Algorithmic

The table below shows the performance of various marketing channels for credit card applications, categorized by Online Applications (Last Touch | 5 Days) and Offline Applications (Last Touch | 10 Days).

	Ad Impressions (Summary)	Ad Clicks (Summary)	Ad Cost (Summary)	Cost Per Click (CPC)	Online Applications Last Touch 5 Days	Offline Applications Last Touch 10 Days
New Marketing Channels Page: 1 / 1 Rows: 400 1-12 of 12	48,341 out of 48,361	37,300 out of 37,316	6,747 SGD out of 6,750 SGD	0.18 SGD	15,767 out of 12,787	16,554 out of 20,343
1. Meta	47,887 99.1%	36,944 99.0%	6,684 SGD 99.1%	0.18 SGD	3,771 23.9%	4,602 27.8%
2. Email	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	3,087 18.6%
3. In-App Messaging	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	964 5.8%
4. Google	454 0.9%	356 1.0%	64 SGD 0.9%	0.18 SGD	2,242 14.2%	2,791 16.9%
5. Push	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	1,989 12.0%
6. Paid Search	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	1,543 9.3%
7. Natural Search	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	387 2.3%
8. Tiktok	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	369 2.2%
9. Television	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	220 1.4%
10. Print	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	111 0.7%
11. Direct Mail	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	103 0.7%
12. Social Referrals	0 0.0%	0 0.0%	0 SGD 0.0%		Invalid	100 0.6%

Insights Unlocked!

- Meta is our top performing channel historically for credit card acquisitions

3.5 Data Insights Agent

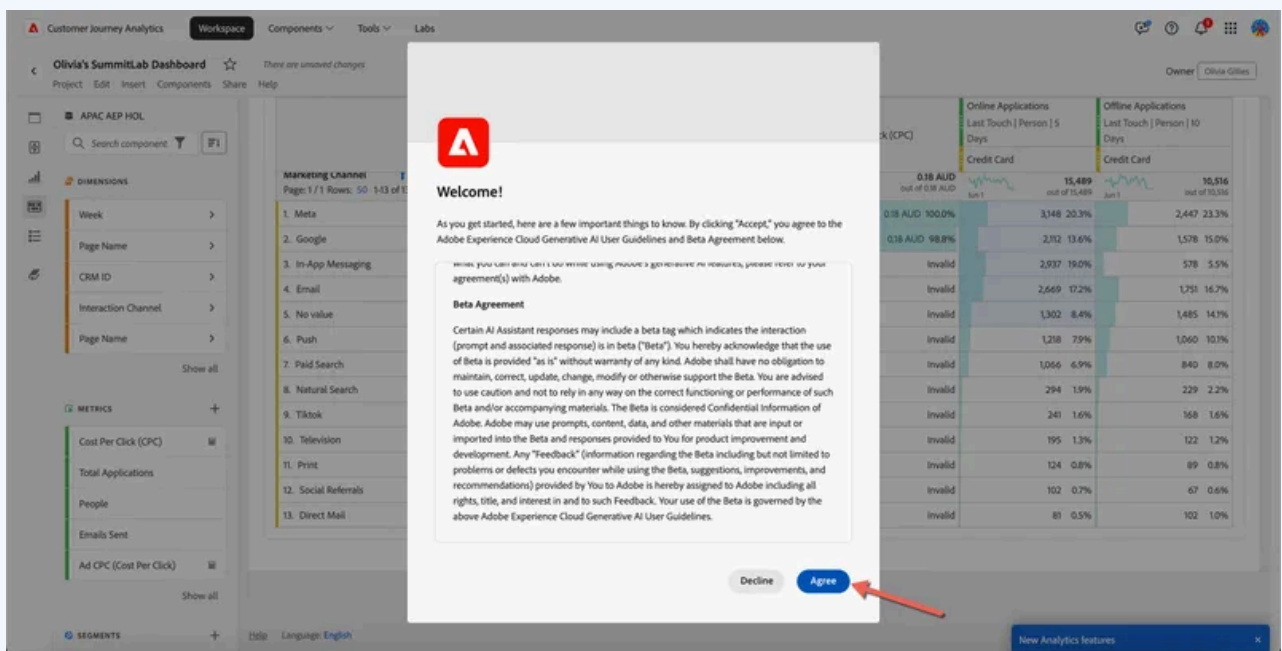
We've seen so far how Data Analysts can use Customer Journey Analytics to quickly answer business questions but what about when an Analyst isn't available?

With Data Insights Agent, business users can now build this kind of analysis on their own.

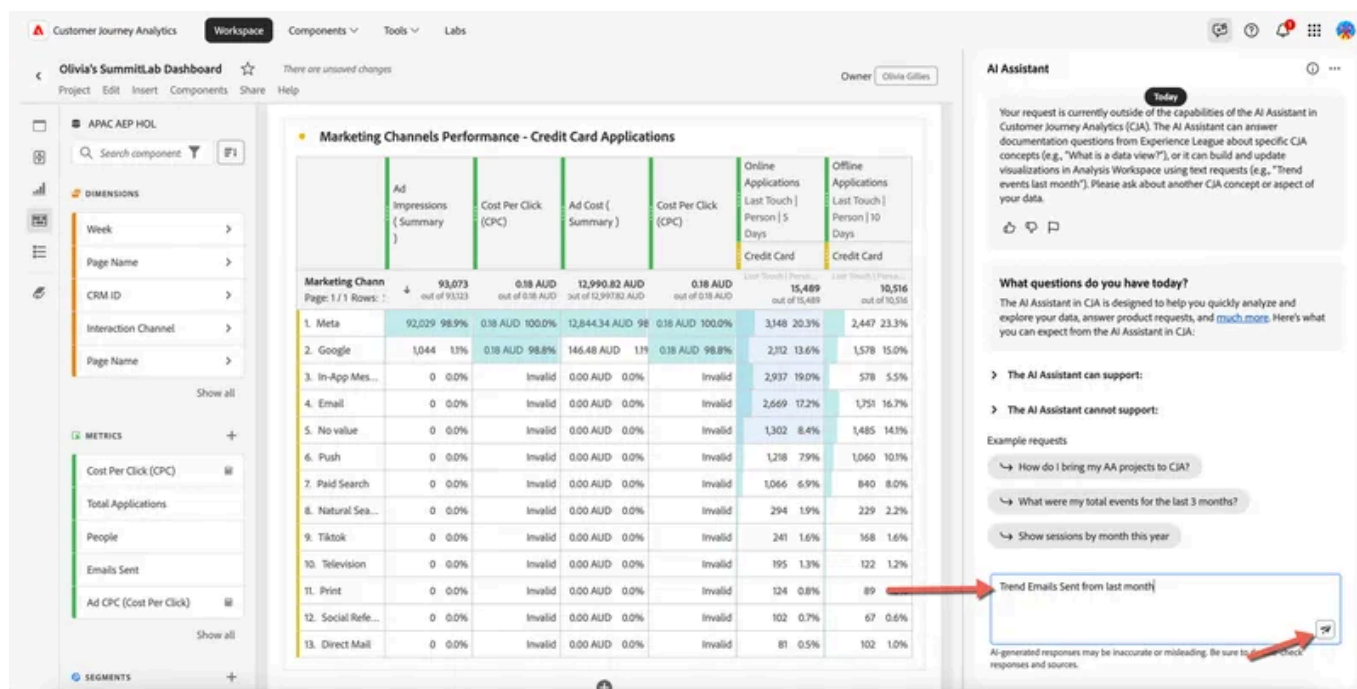
Open the AI Assistant by clicking the icon in the top right.



You might be asked to accept the Beta access agreement, you can safely do this in our demo environment.

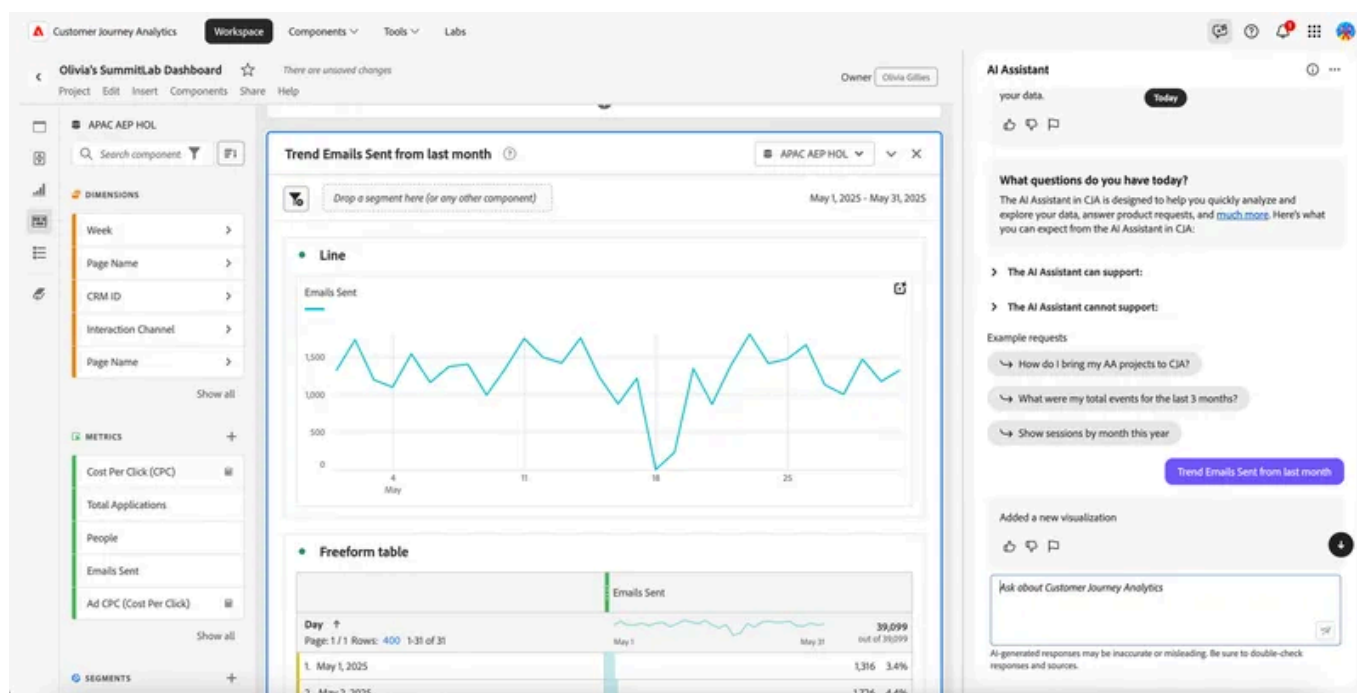


Ask AI Assistant to "**Trend Emails Sent from the last month**".



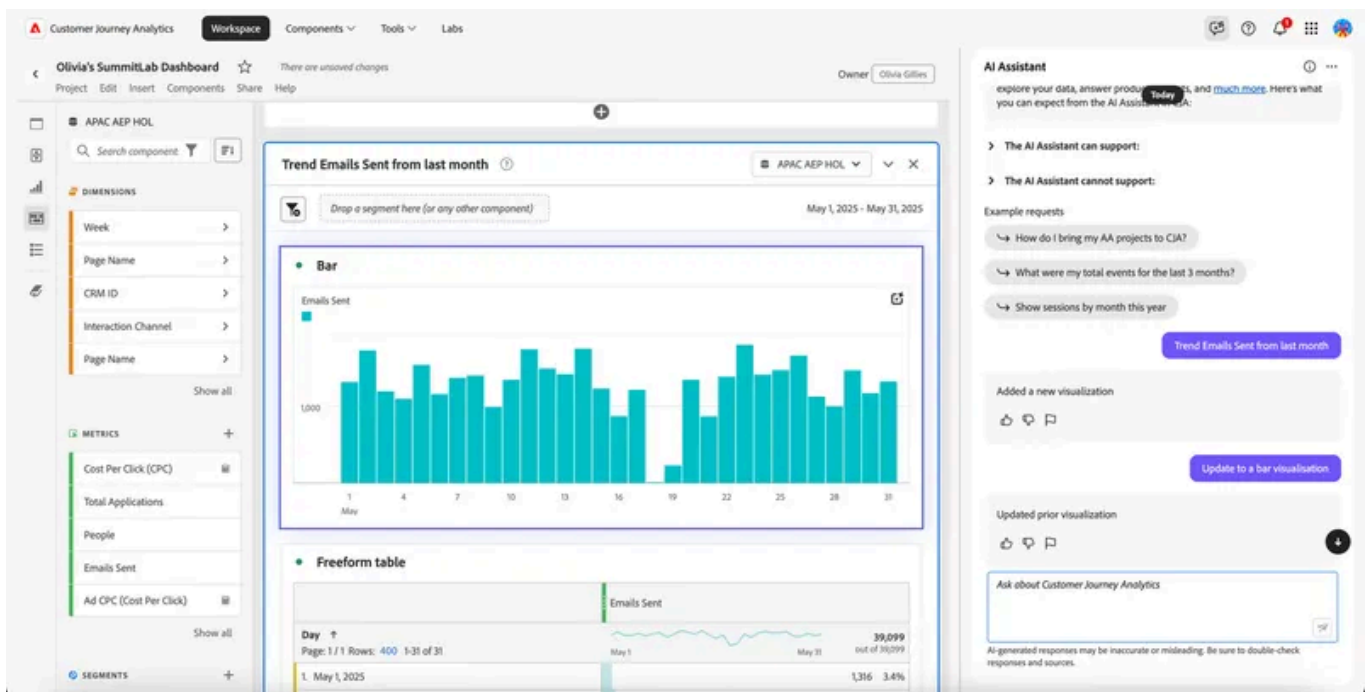
The Data Insights agent looks through all the data in the Data view, including the different types of metrics and components, and translates my prompt to pick out the right dimension, metric, and date range for this analysis.

It automatically generates a free form table that shows the correct time range, metric, and dimension. Taking it a step further, it selects the best visualization to showcase the data and answer my original prompt.

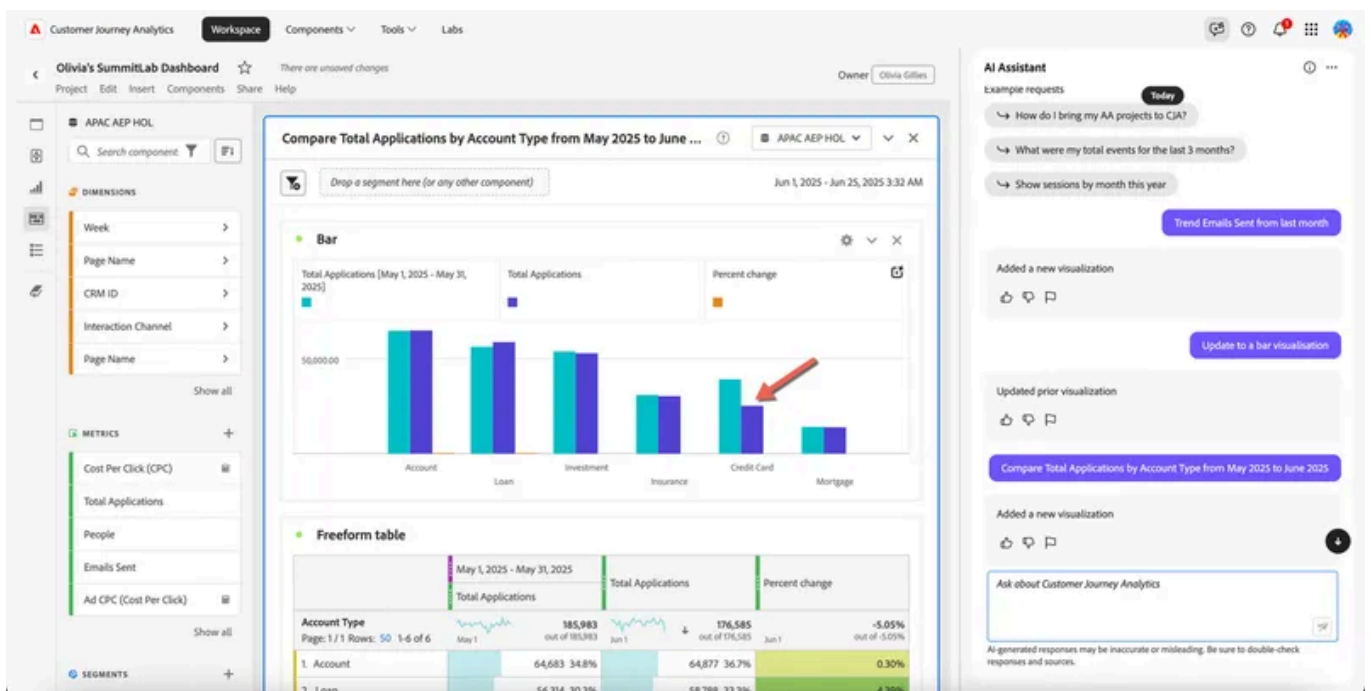


You can ask it to update the metrics or visualisation if it's not what you were after.

Ask AI Assistant: **"Update to a bar visualisation"**



Now let's dig a bit deeper and ask AI Assistant to "**Compare Total Applications by Account Type from May 2025 to June 2025**"



In seconds we can see the dip in credit card applications that we were investigating above!

Summary

Congratulations, you've completed the exercise to gather insights using Customer Journey Analytics!

If you still have time available, try one of the other labs!