Sydney Summit - Adobe Experience Platform Hands on Lab

1. Sydney Summit AEP Hands-On
2. Lab 1 - Introduction to AEP
3. Lab 2 - Journeys and Content
4. Lab 3 - Omni-channel Insights
5. Lab 4 - Federated Audiences

1. Sydney Summit AEP Hands-On

Welcome to the Adobe Summit AEP Hands-on Lab - Sydney Edition!

Please select one of the exercises below that most closely aligns to your current experience and interest area with Adobe Experience Platform.

Exercise	Target Audience
Lab 1 - Introduction to AEP	New users to Adobe Experience Platform
Lab 2 - Journeys and Content	Existing CDP users interested in exploring Adobe Journey Optimizer
Lab 3 - Omni-channel Insights	Existing Adobe Analytics Users or Data Analysts interested in exploring Customer Journey Analytics
Lab 4 - Federated Audiences	Existing CDP or AJO users interested exploring the new Federated Audience Composition Add on.

Access

Login details have been provided on your desk. *Please log out of your existing Adobe login before continuing.*

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

The password for all users is **Syd@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

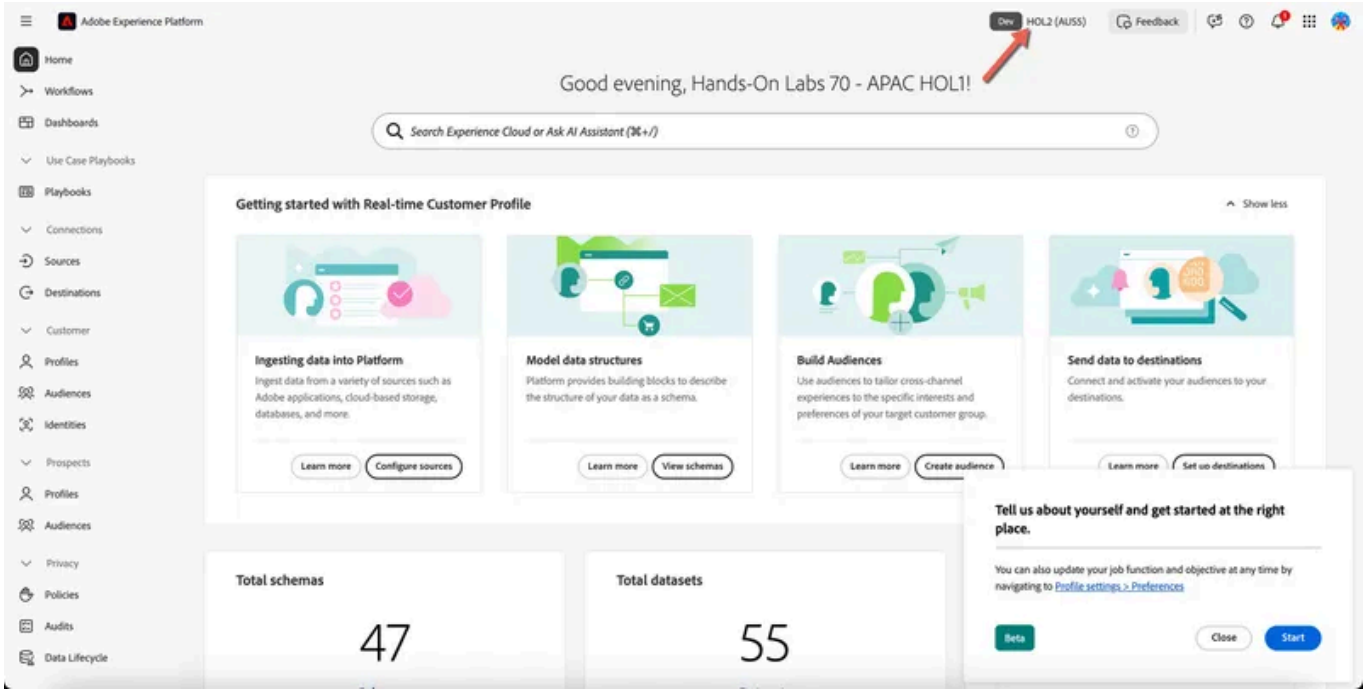
SecurFinancial is a leading retail bank offering personal banking services across a range of loans, credit cards and insurance products. They have recently completed their Adobe Experience Platform Real-Time CDP implementation. With unified customer profiles and real-time data streaming in from digital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

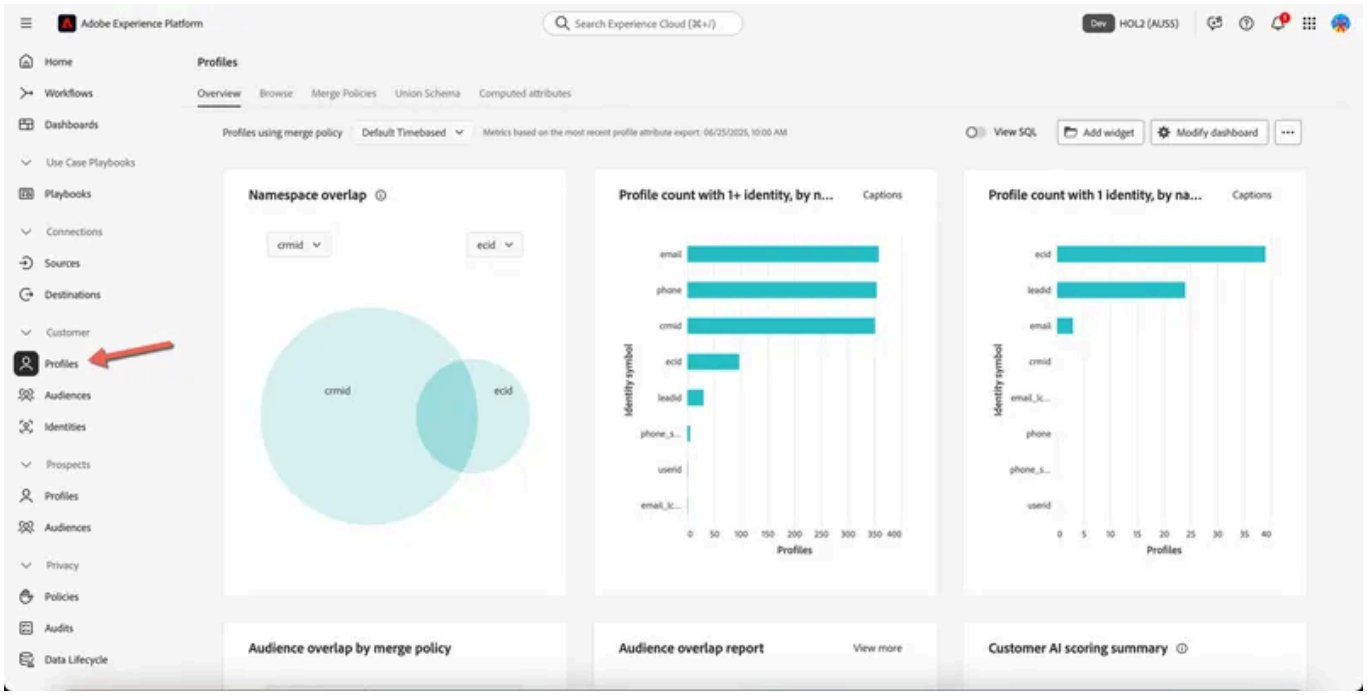
Before you get started please confirm that you are in the right sandbox - it should be **HOL2 (AUS5)**



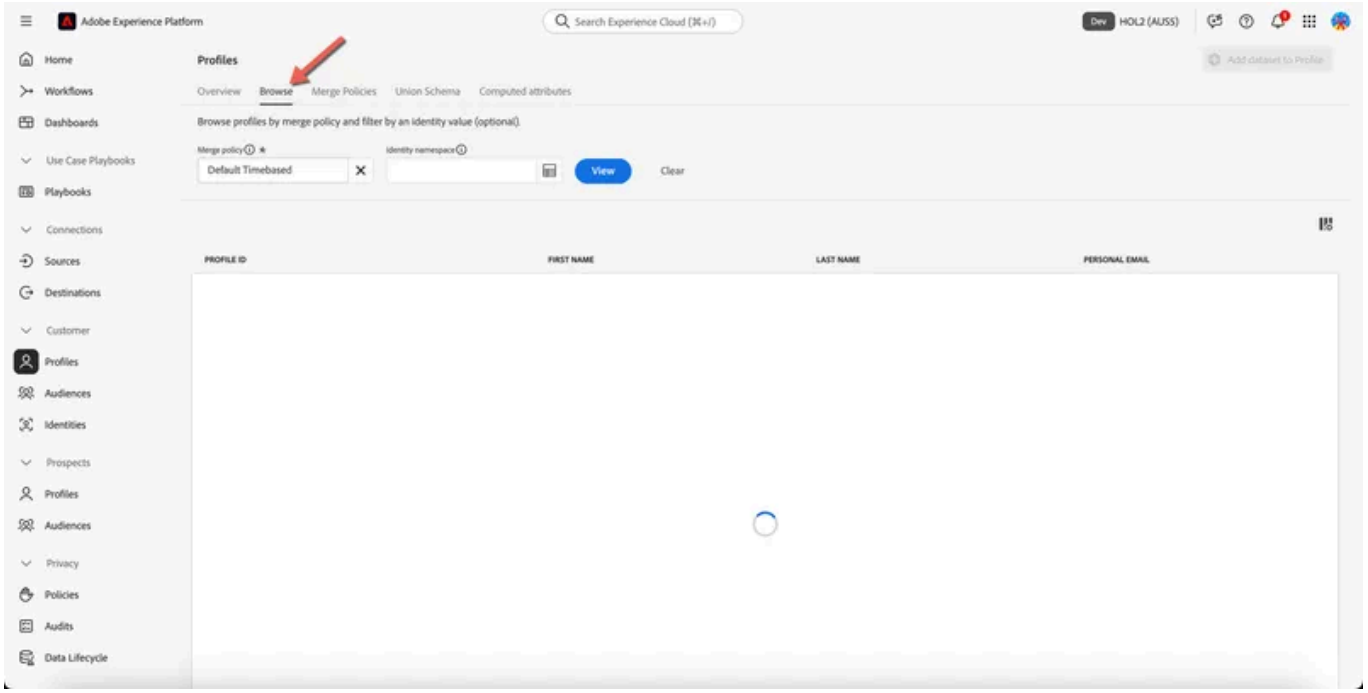
2.1 The Unified Profile

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.

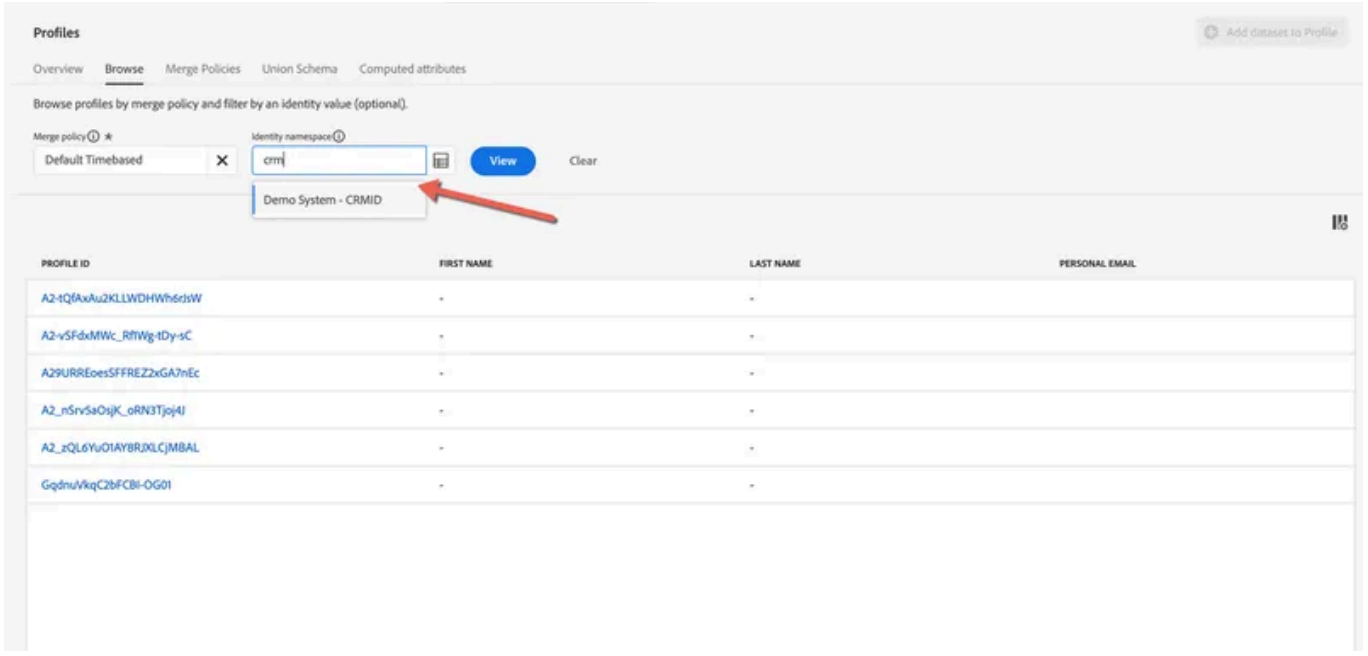


To lookup a specific profile, move to the **Browse** tab.

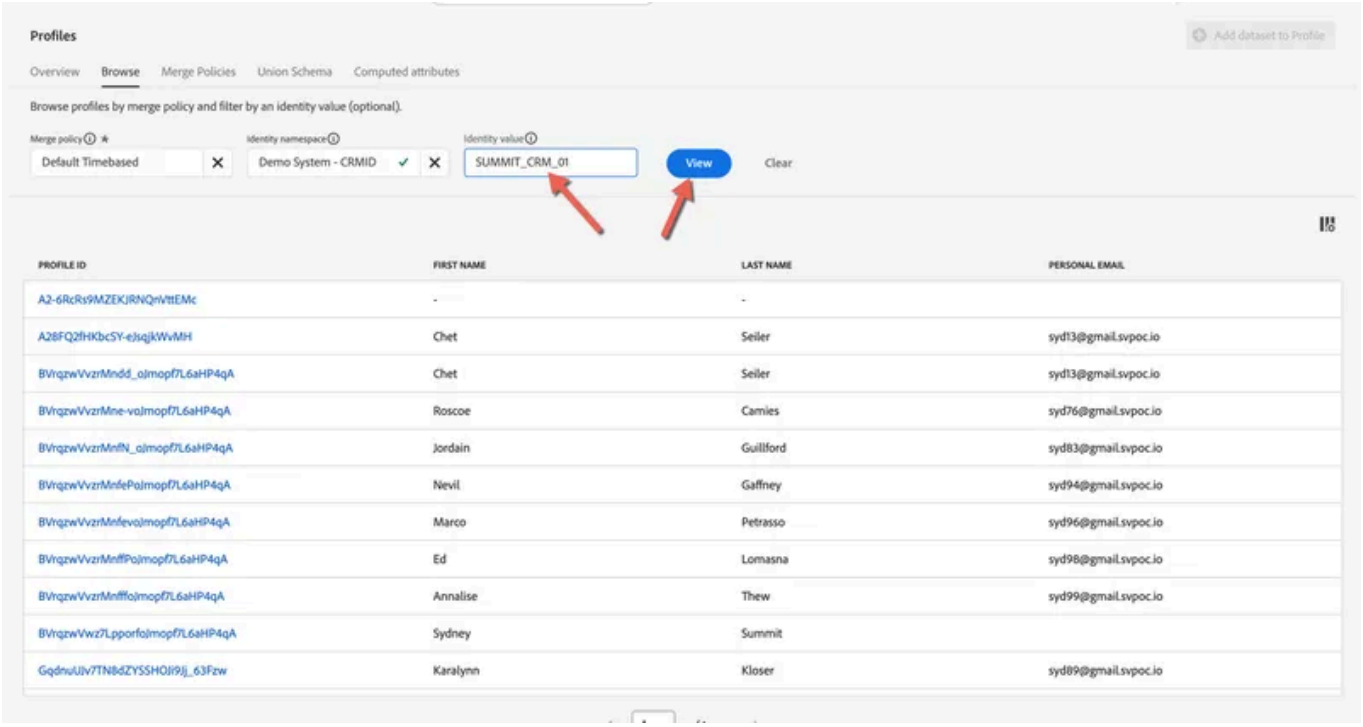


Profiles can be retrieved by any of the identities that are attached to that profile. Which identity namespaces are leveraged depends on your organisations requirements. For this exercise we will use a CRM Id to look up your profile.

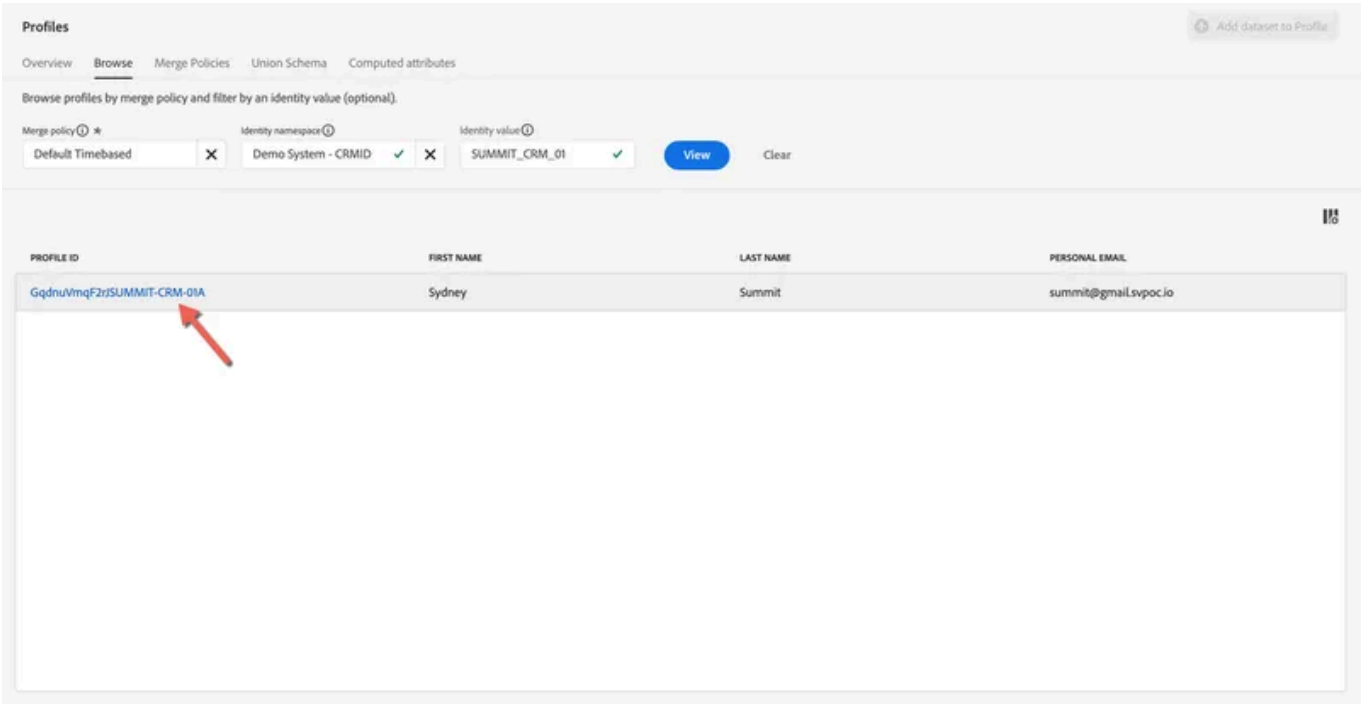
Start typing **crm** in the **Identity namespace** field, select **Demo System - CRMID** when it appears.



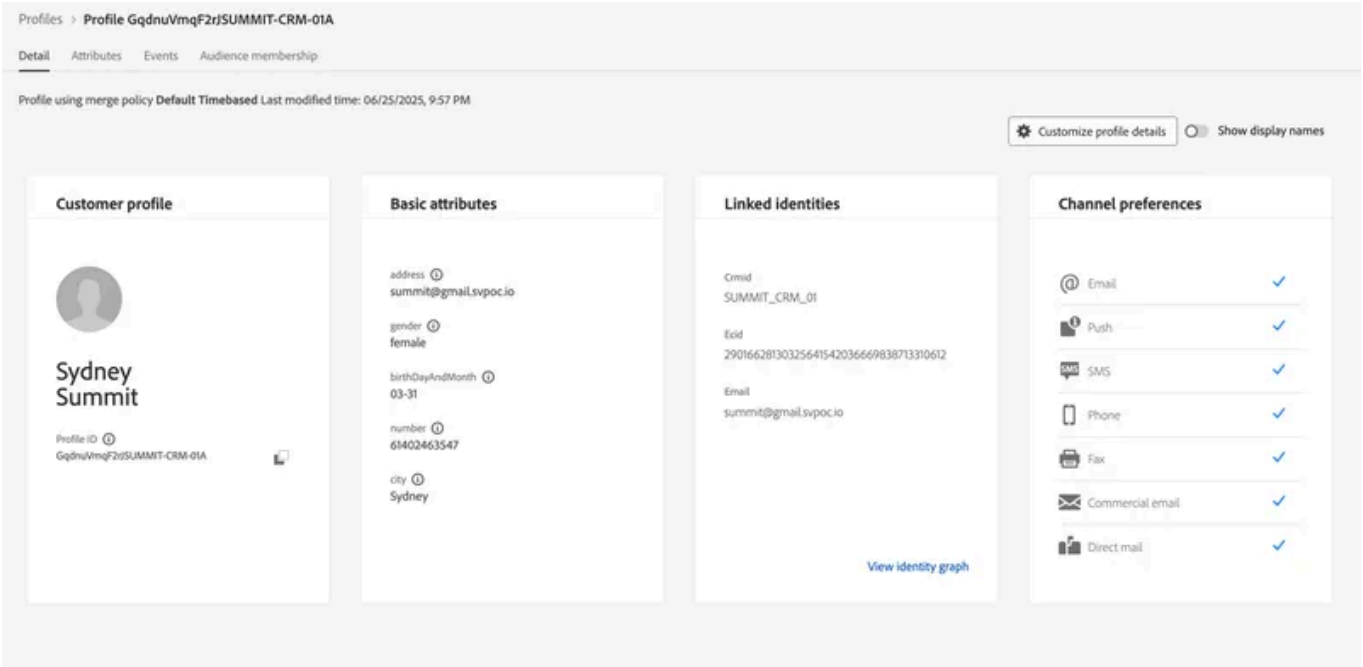
Type **SUMMIT_CRM_01** into the **Identity value** field and click **View**



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

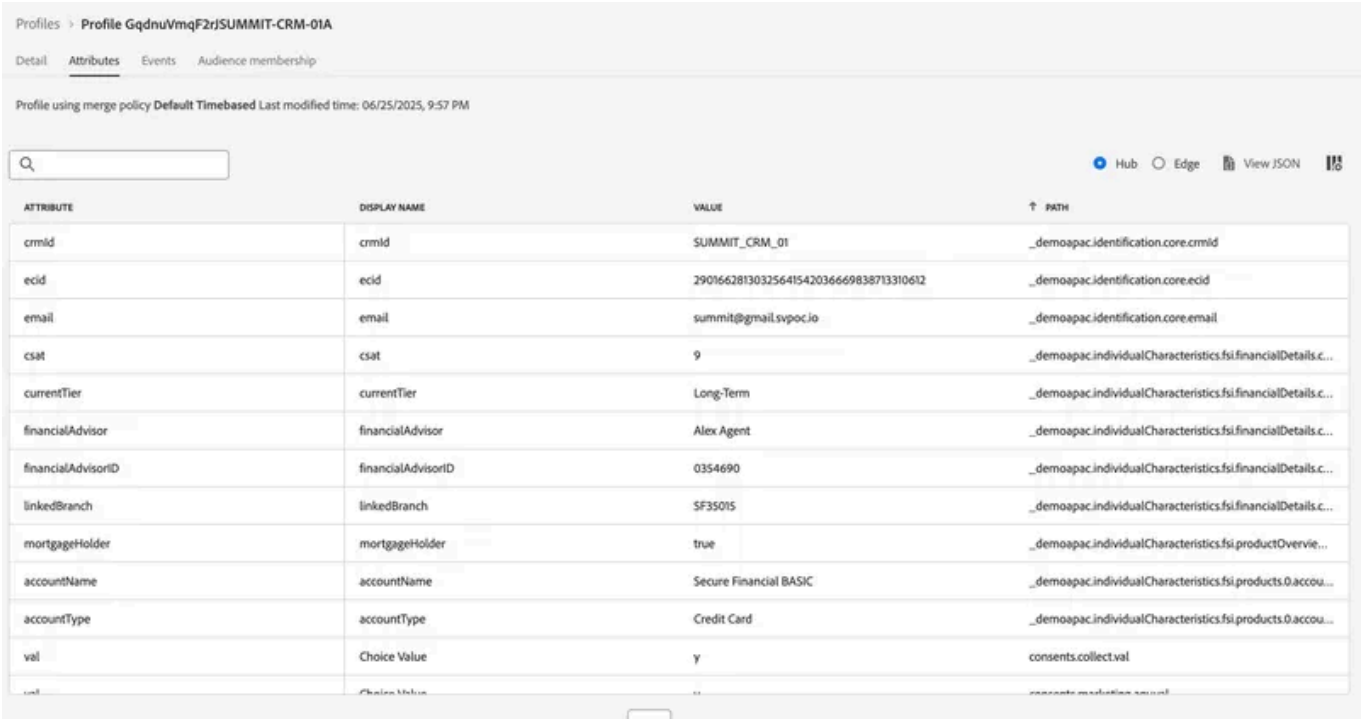


The **Detail** tab shows us some basic information about the profile, which fields are displayed here can be customized according to business needs.

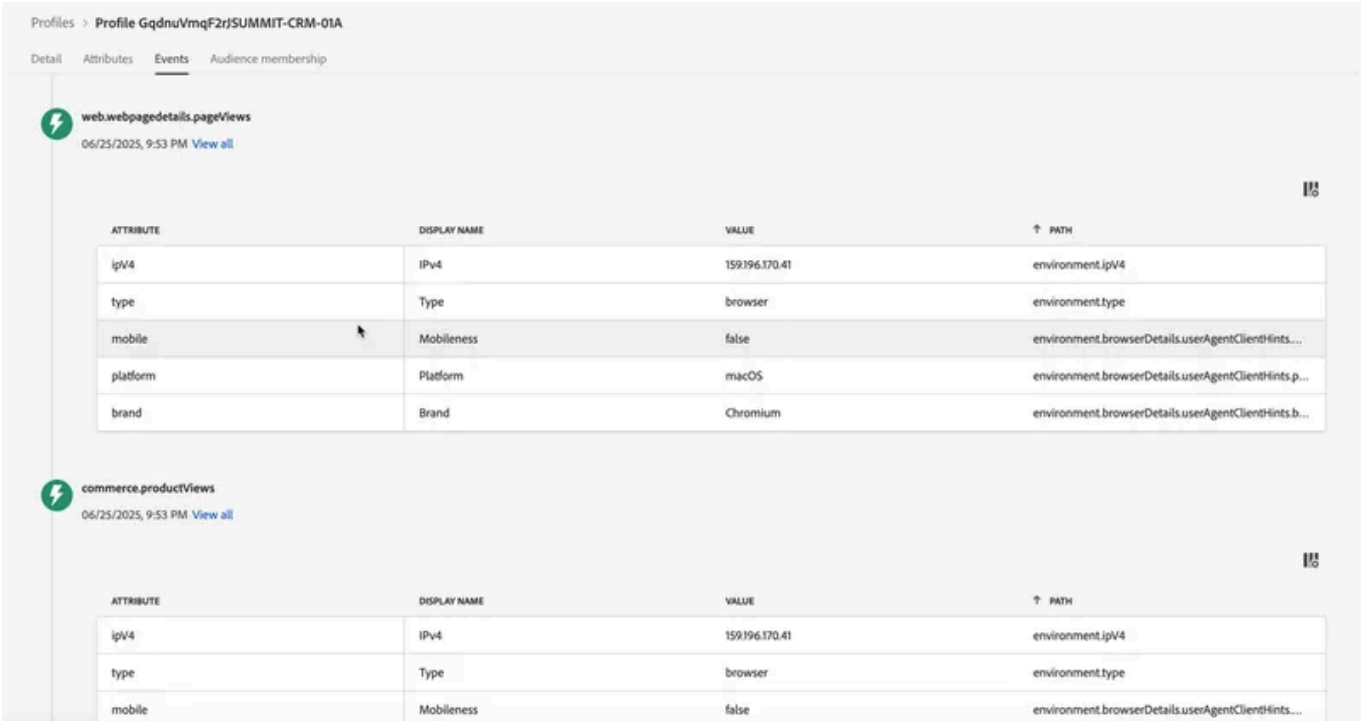


There are 2 main types of data collected against the profile, **Attributes** and **Experience Events**. Profile can change over time while Experience Events represent point in time interactions a profile has had with your brand, whether that's viewing a web page, watching a show, making a booking, calling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

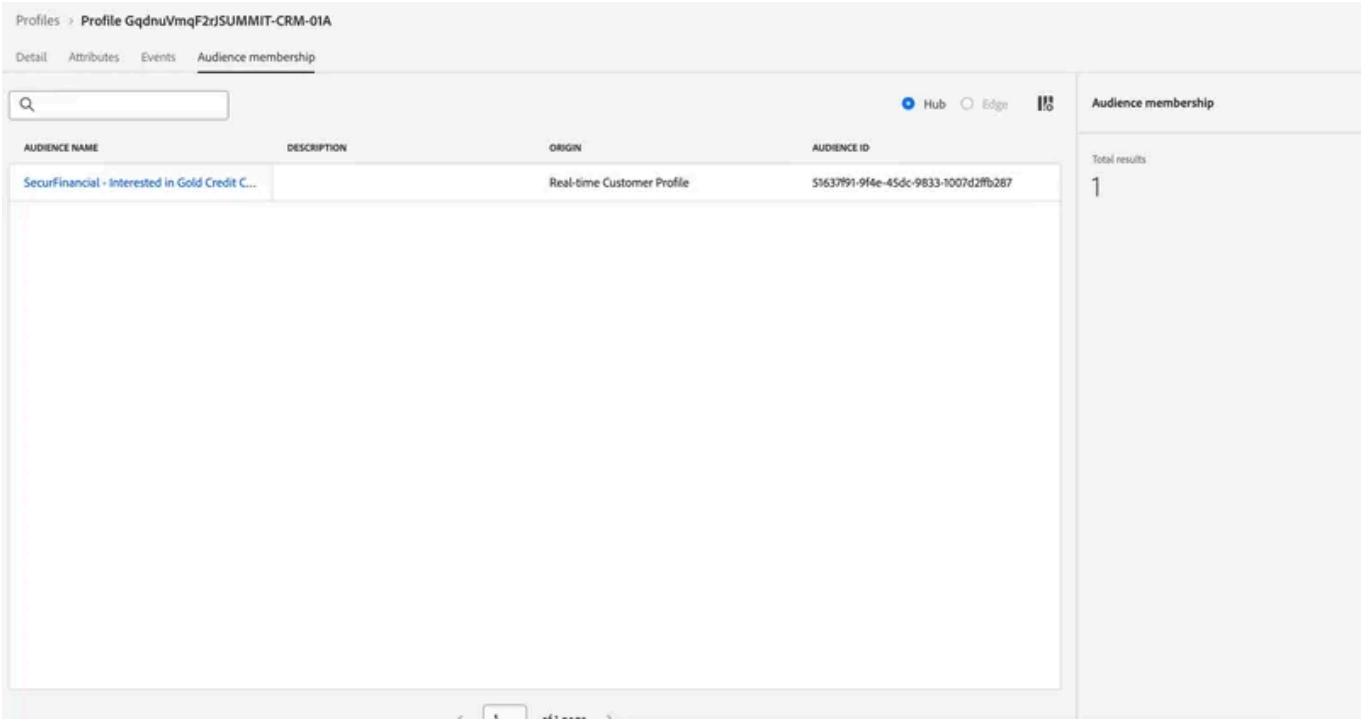
Click on the **Attributes** tab to view the full list of attributes ingested for this profile. These attributes can come from different source systems, Adobe Experience Platform will merge them in real-time.



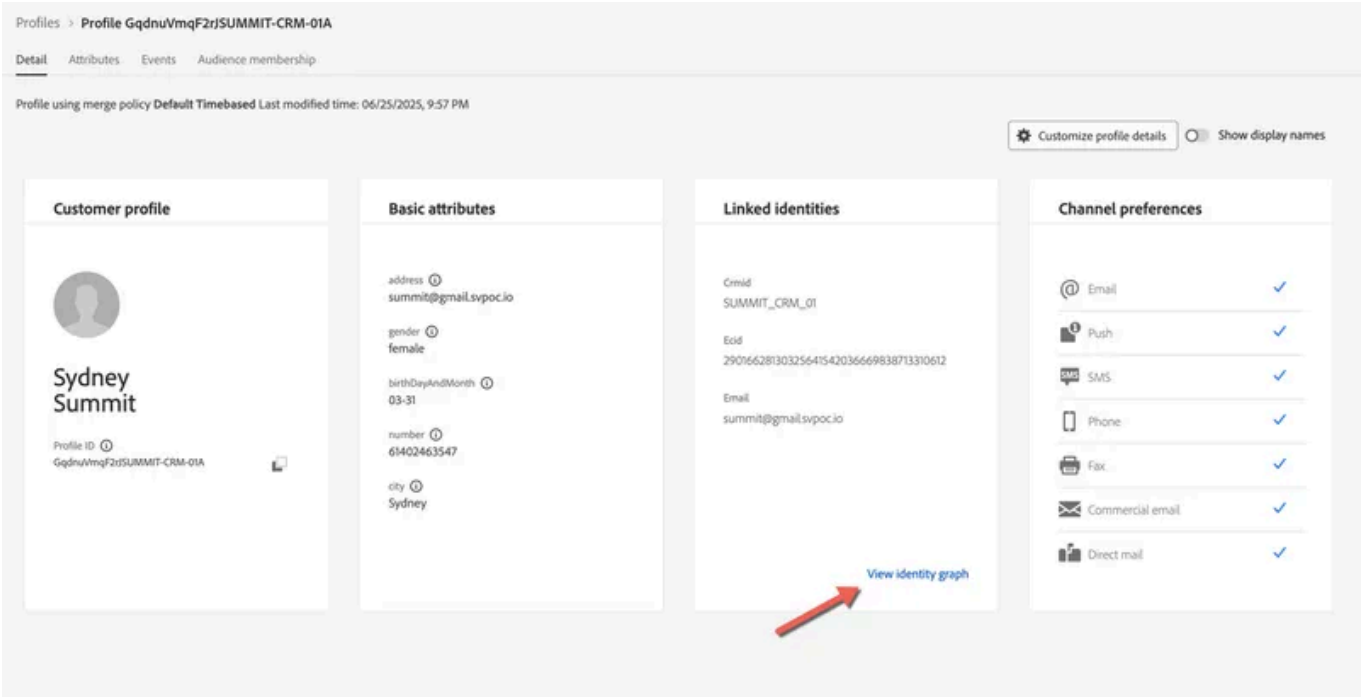
Click on the **Events** tab. Here you can see a chronological view of all the behavioural experience events coming from different source systems for this profile. These events are ingested in real-time from the sources like your website and mobile app.



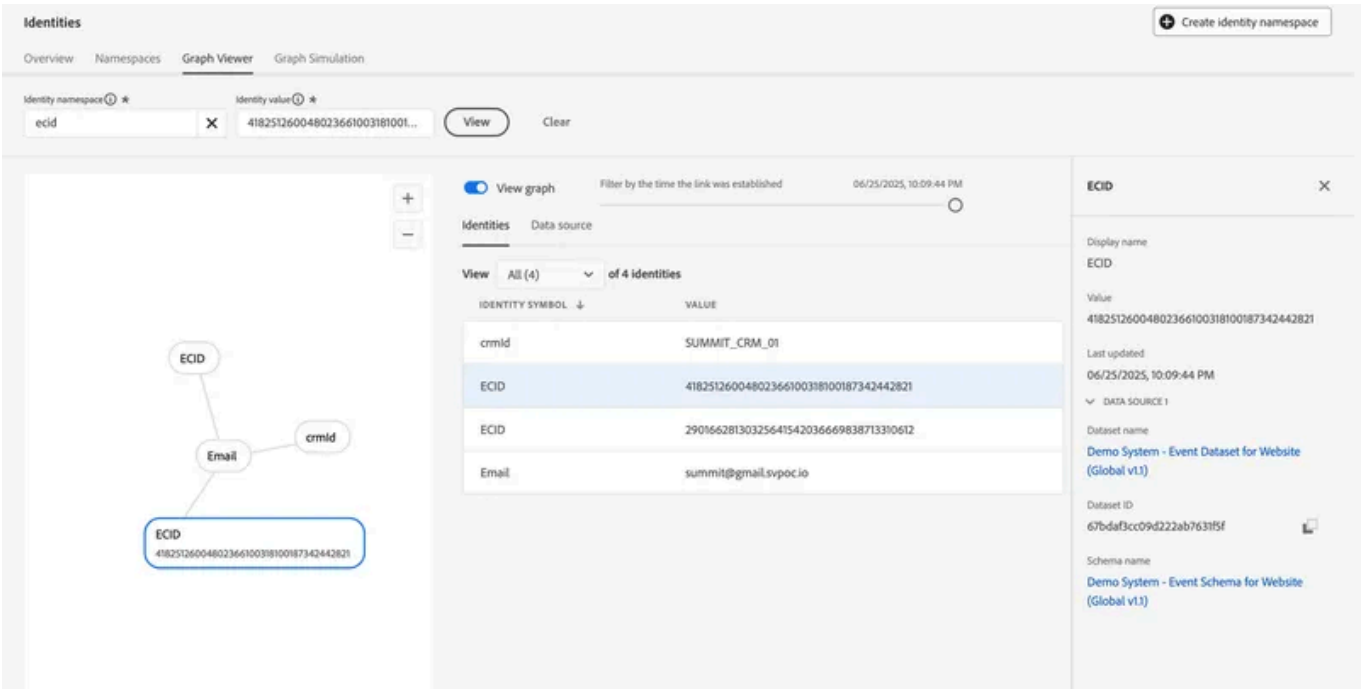
Move to the **Audience membership** tab. Here you can see which audiences the profile is currently a member of, this list will update as the profile moves in and out of audiences based on their attributes and behavior.



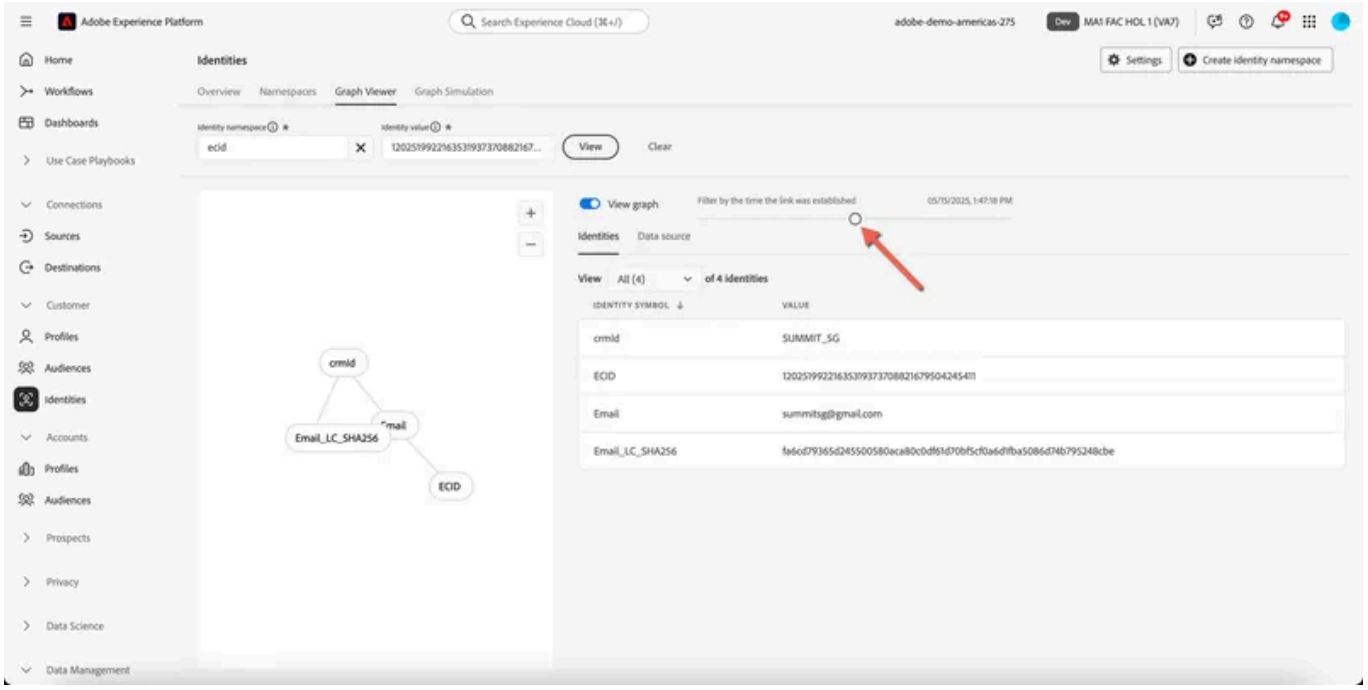
Lastly, return to the **Details** tab and click to view the **Identity Graph**.



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.



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

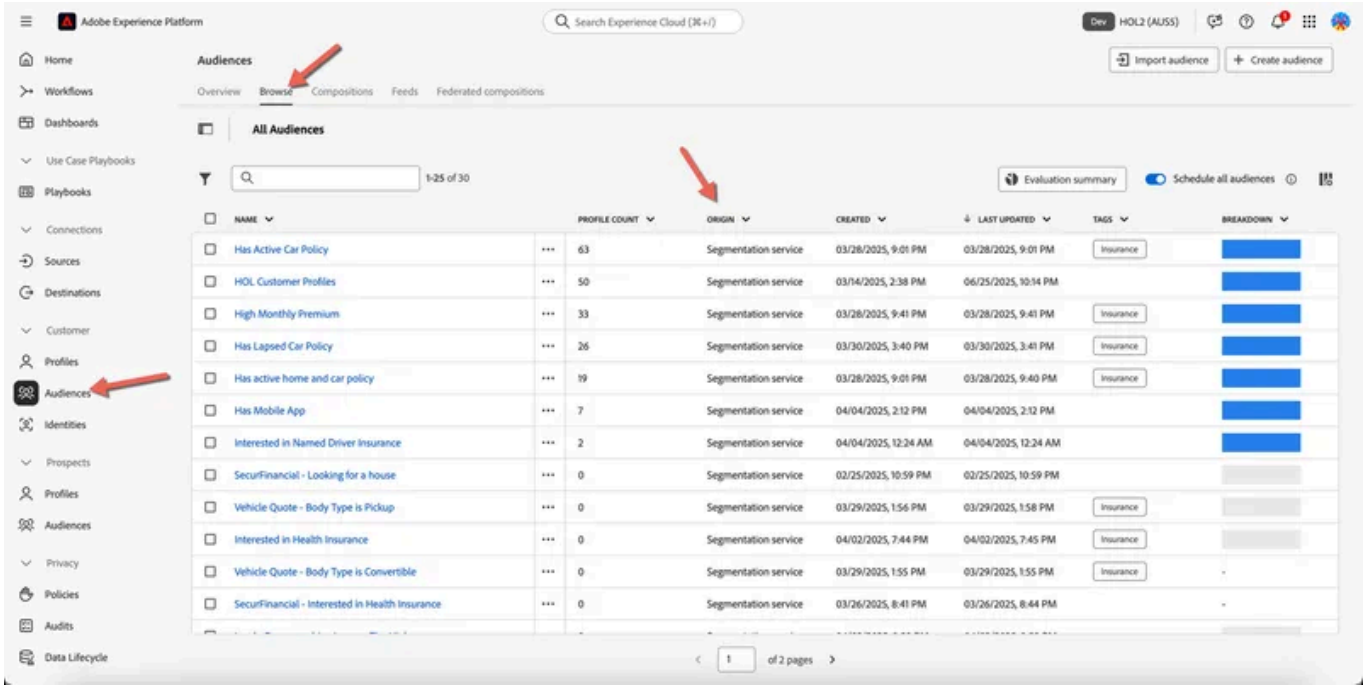


2.2 Create a real-time audience

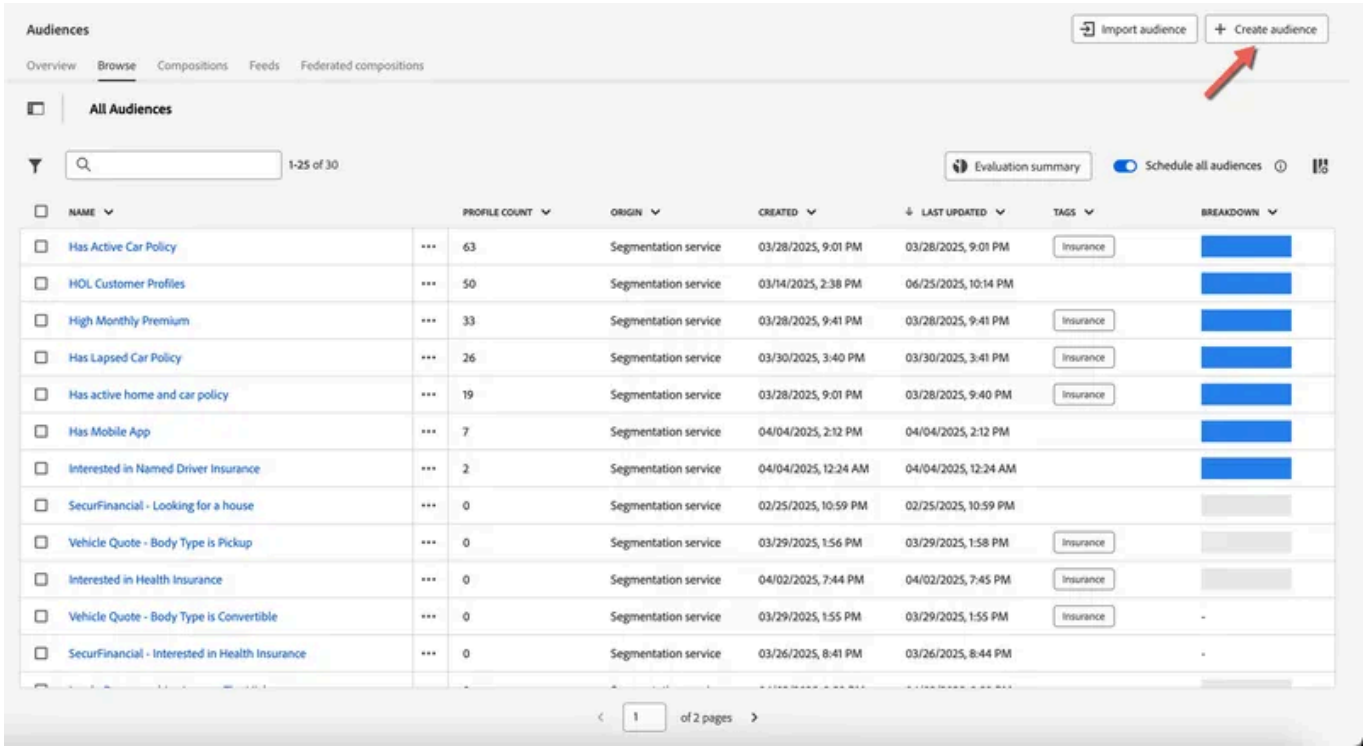
Now you've seen the types of data that lives on our real-time profile, let's create an audience targeting customers aged 18-24 who have visited the credit card application page today. This is the audience that will be used to target some of the personalized home page experience.

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:

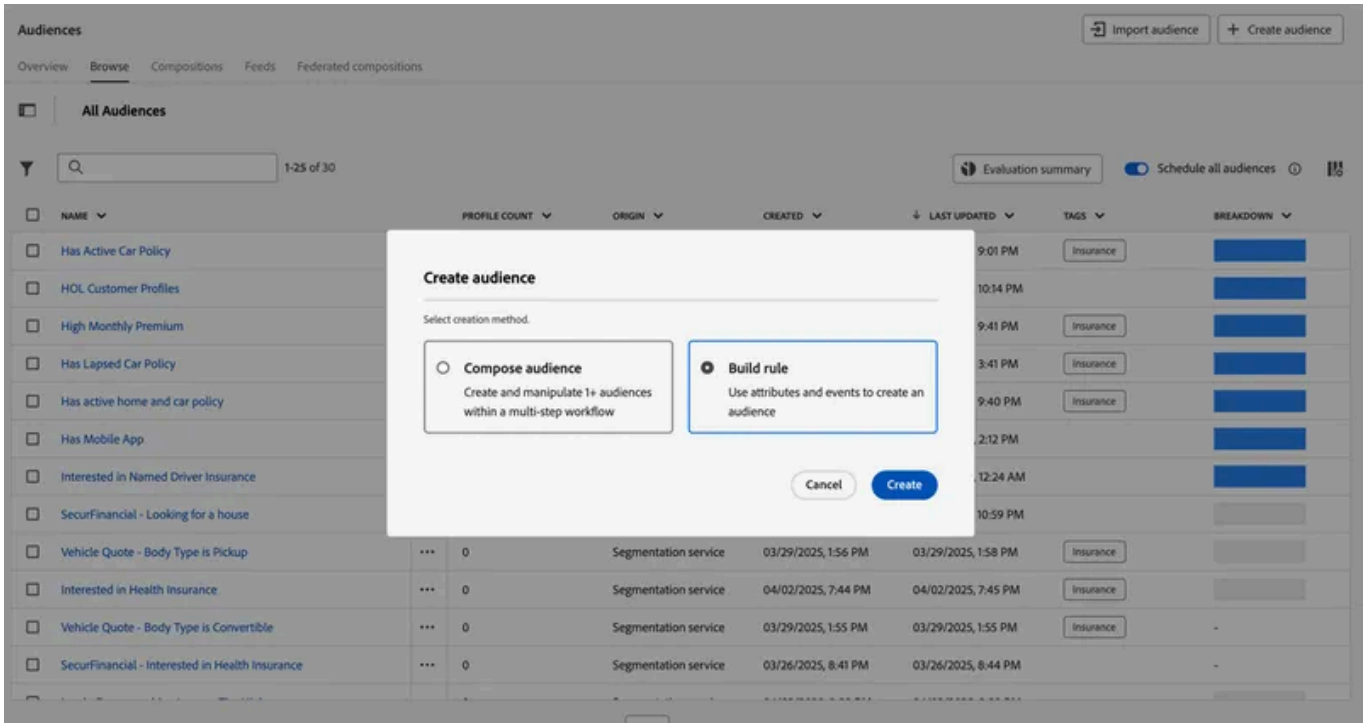
- Segmentation Service - using data onboarded to the real-time profile
- Federated Audience Composition - using data that lives in a remote data warehouse
- Customer Journey Analytics - segments can be shared directly from the analysis done in CJA.
- Custom Upload - directly from files



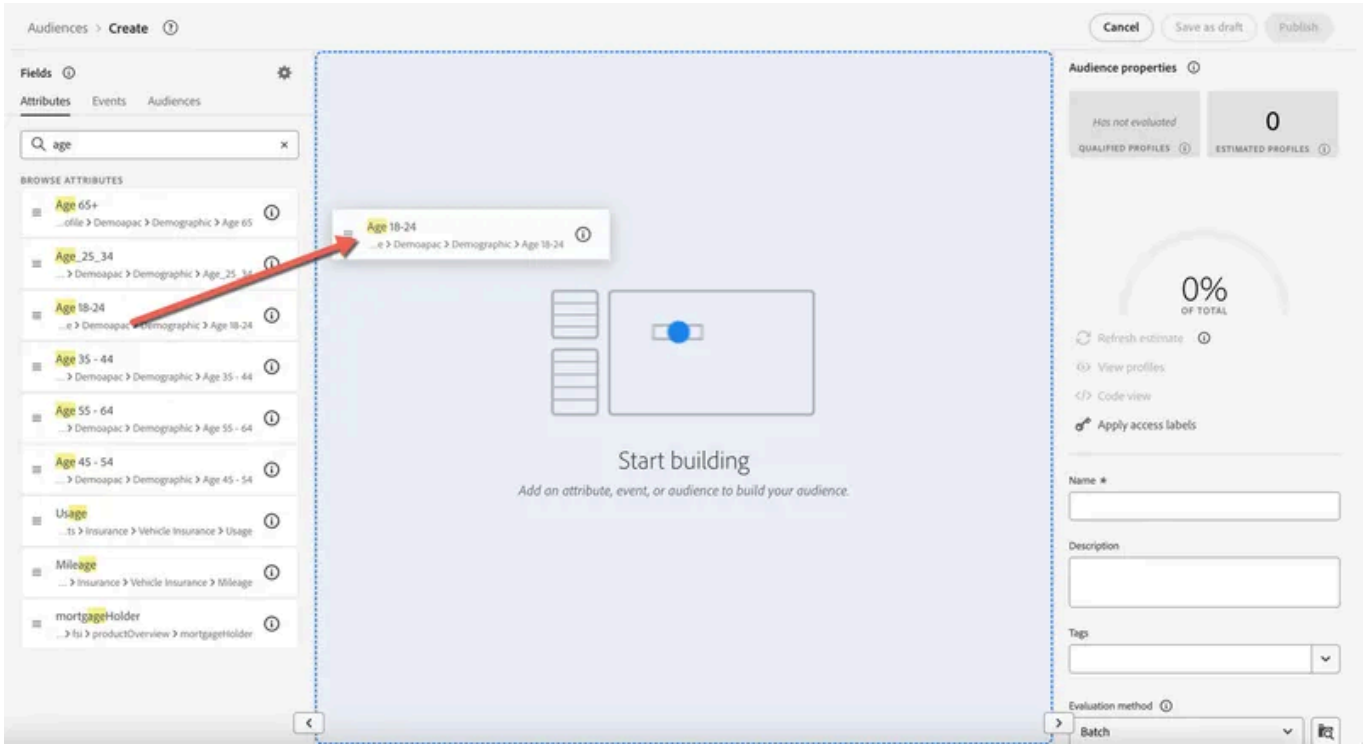
Click to **Create Audience.**



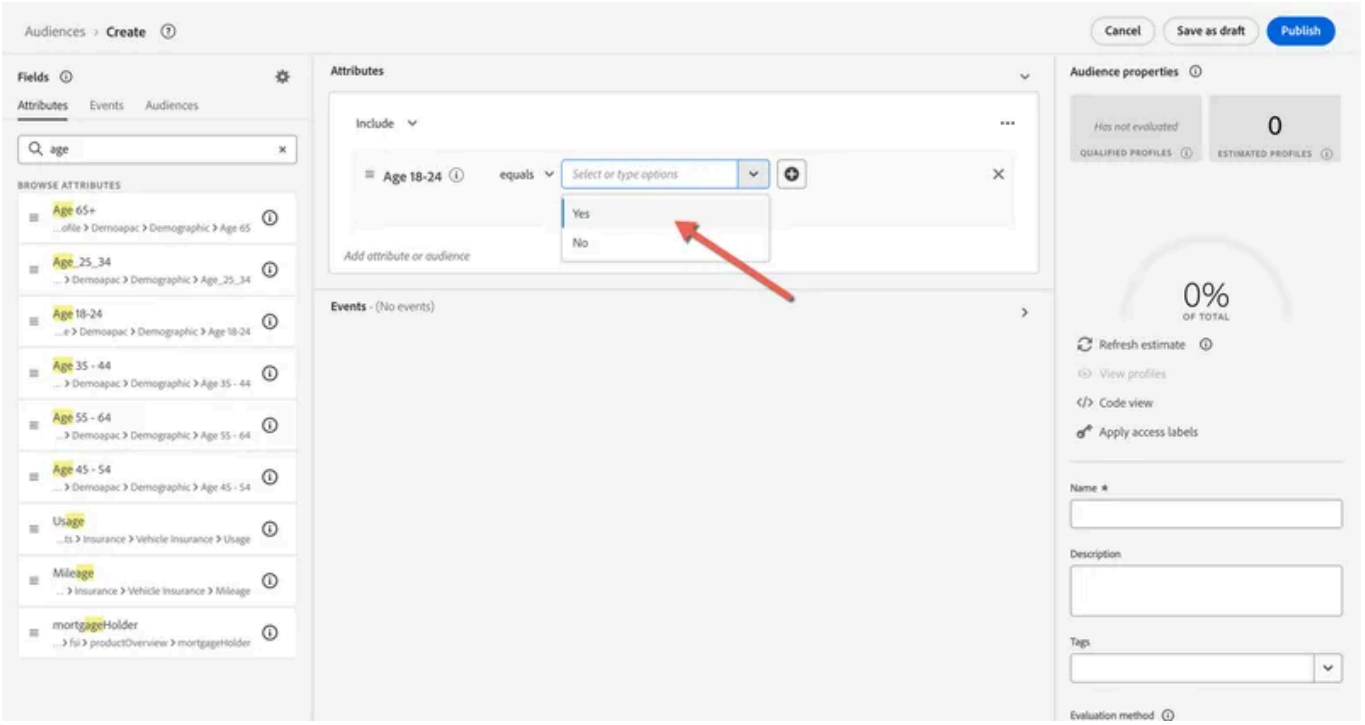
Change the option from compose audience to **Build rule** and click **Create.** We are going to create a new rule based audience using the attributes and events in our profile.



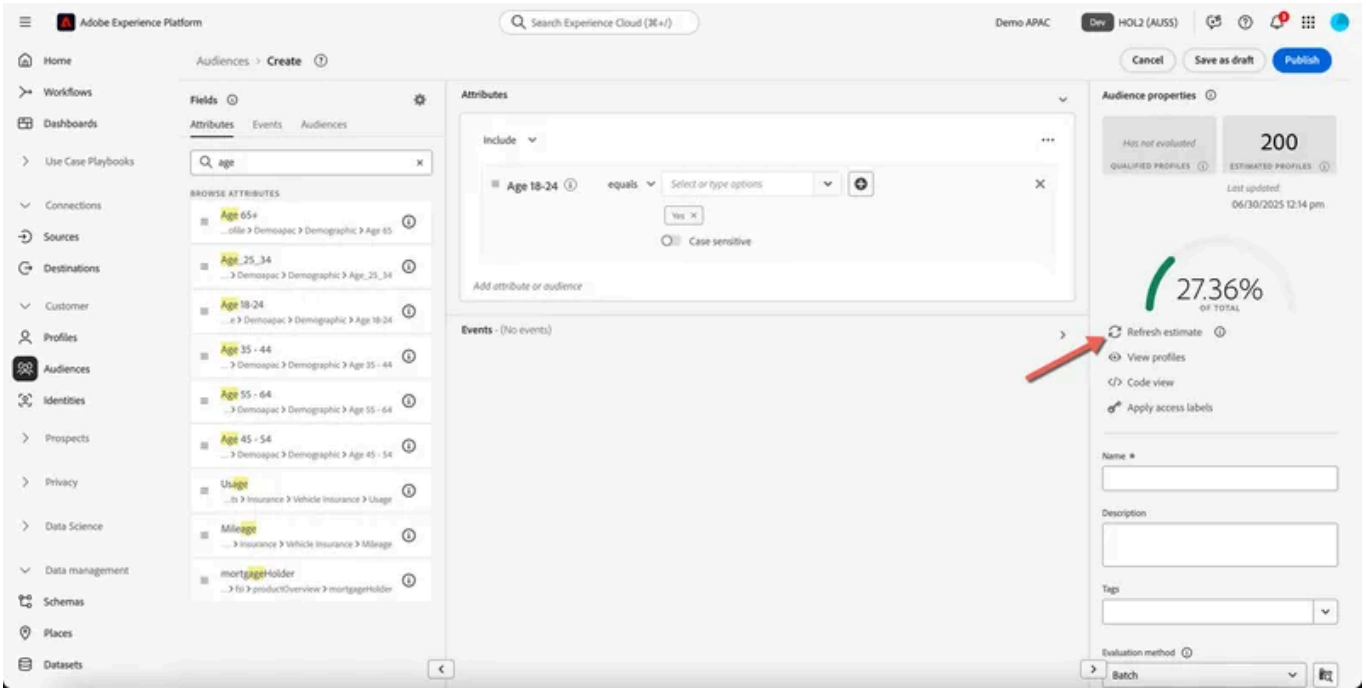
In the audience builder we can add attribute and event based rules. From the Attributes tab, search for **age** and drag the **Age 18-24** attribute into the builder.



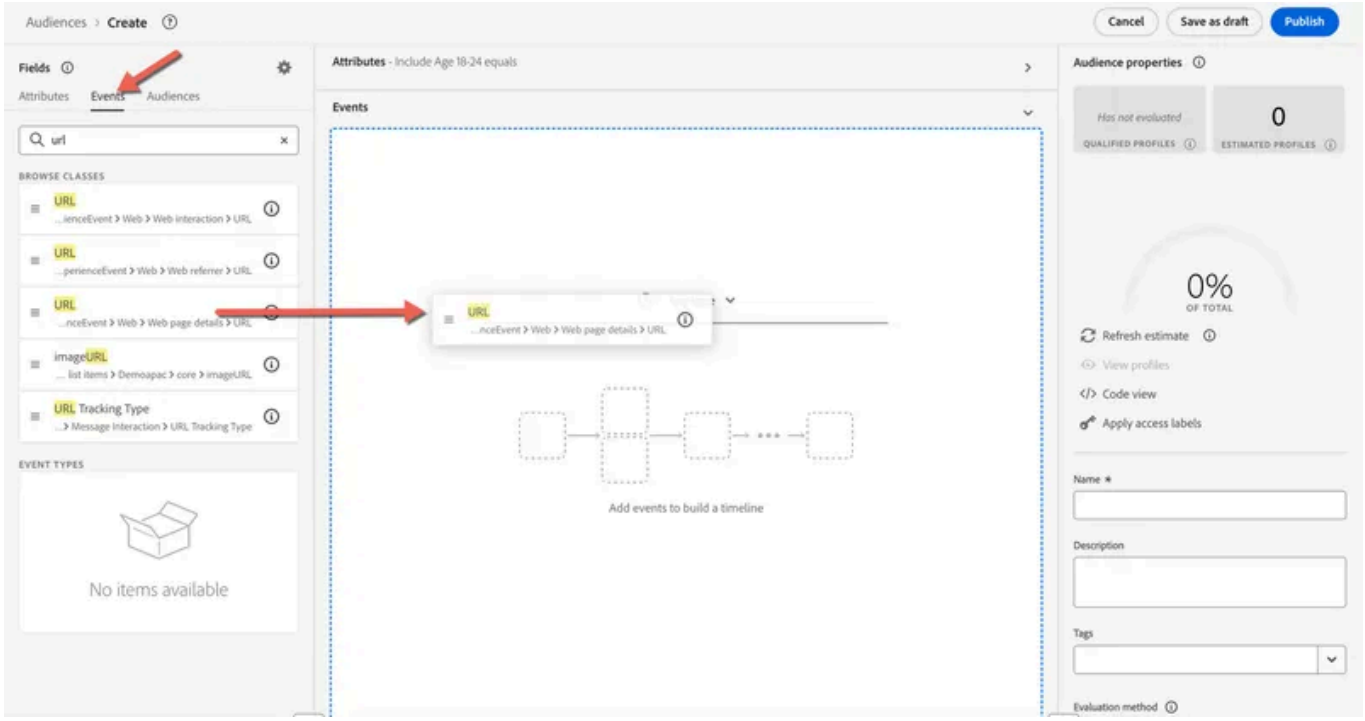
Set the value to **yes**



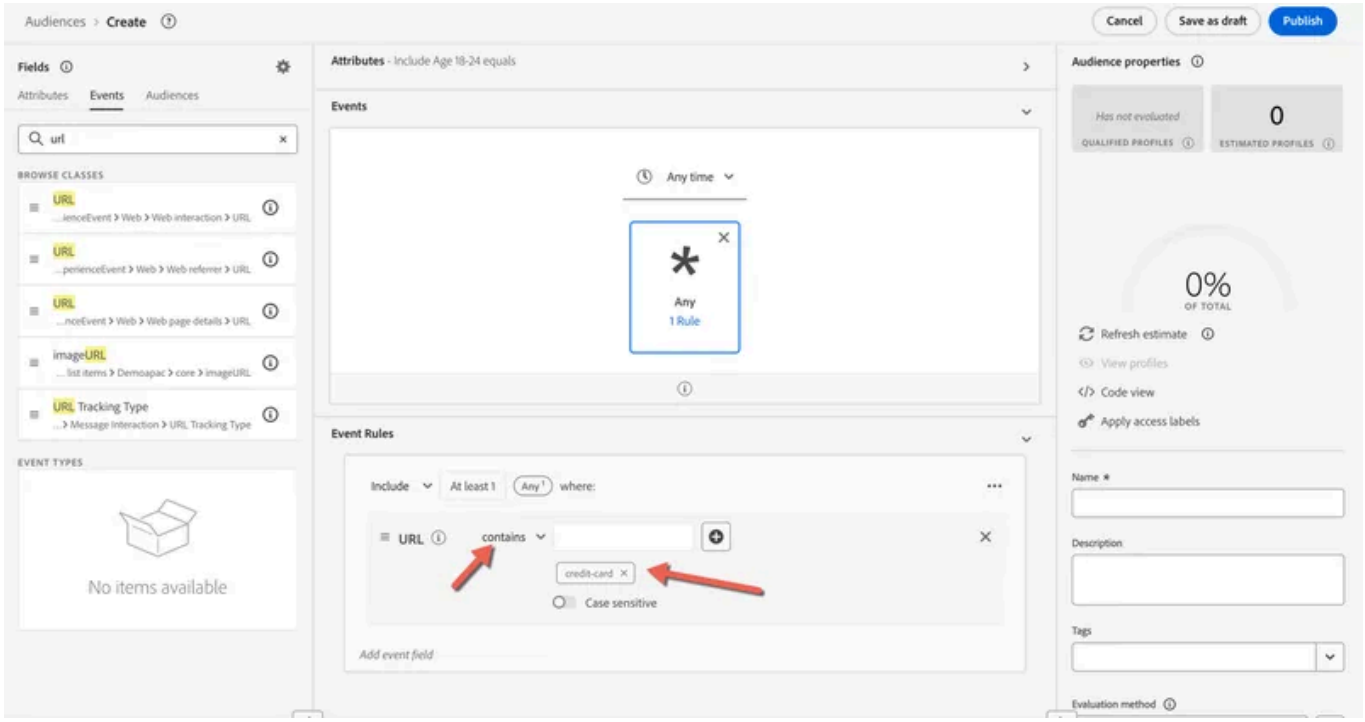
You can estimate the size of your audience at any time while configuring it. Click the **Refresh estimate** link in the **Audience properties** panel



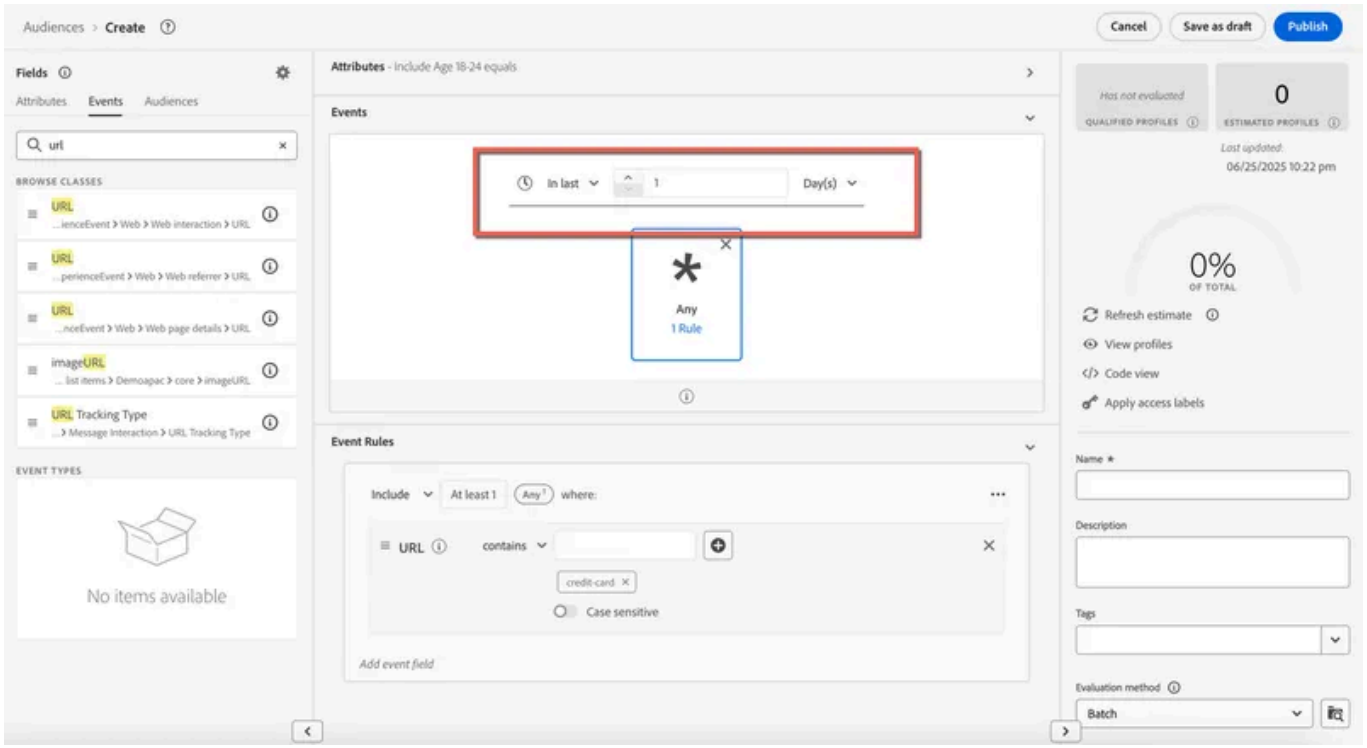
Now we want to add an event based rule. Change to the **Events** tab and search for **URL.** Drage the **Web page details > URL** field into the builder.



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.

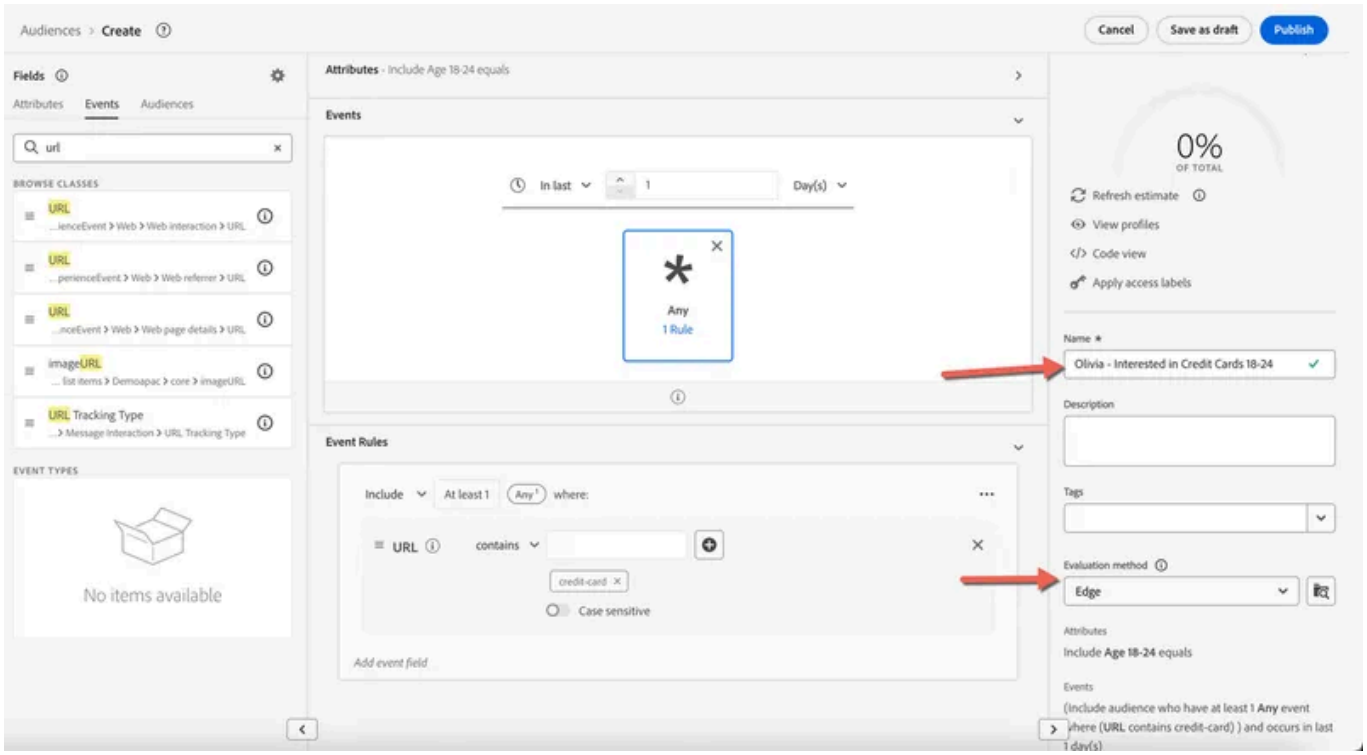


Now let's add a time frame so users will drop out of the audience if they don't show continued interest. Change the setting from any time to **In last 1 days.**

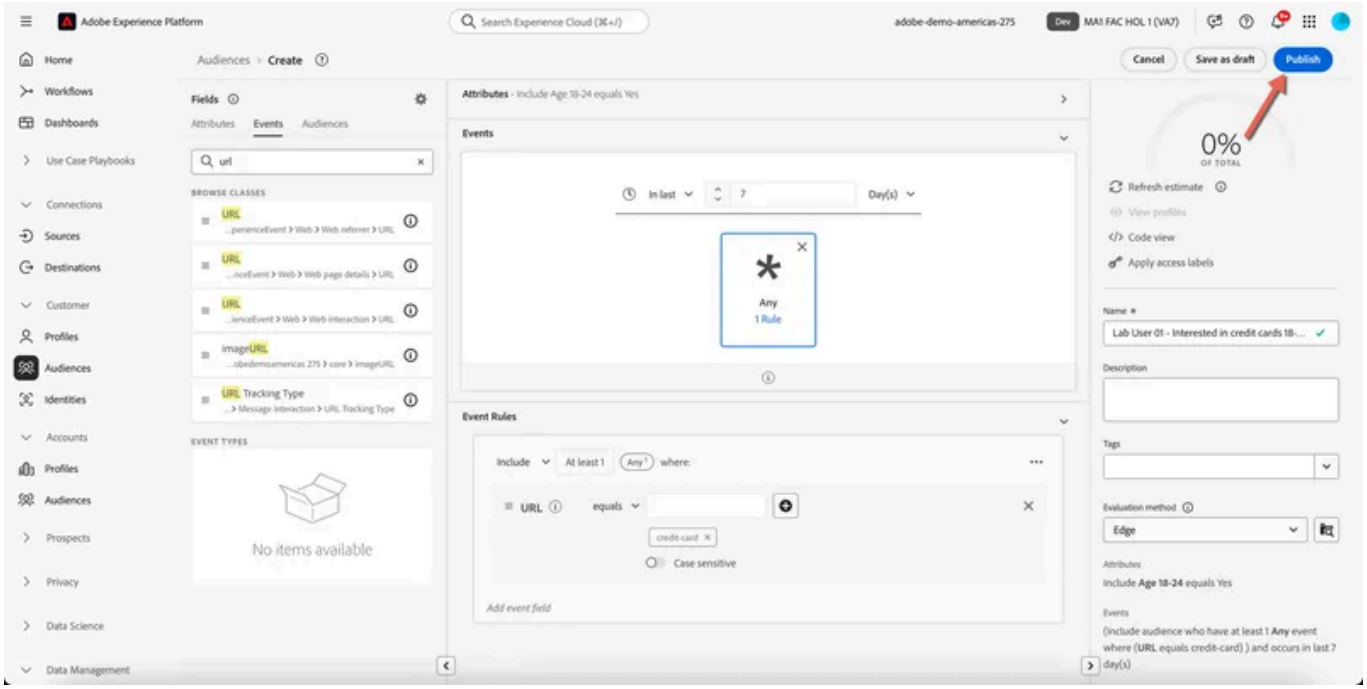


Lastly we need to give the audience a name and set the evaluation method. For the name prefix it with your lab user number or your name so you can easily recognise it later. Eg. **Lab User 01 / Olivia - Interested in Credit Cards 18-24.**

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.



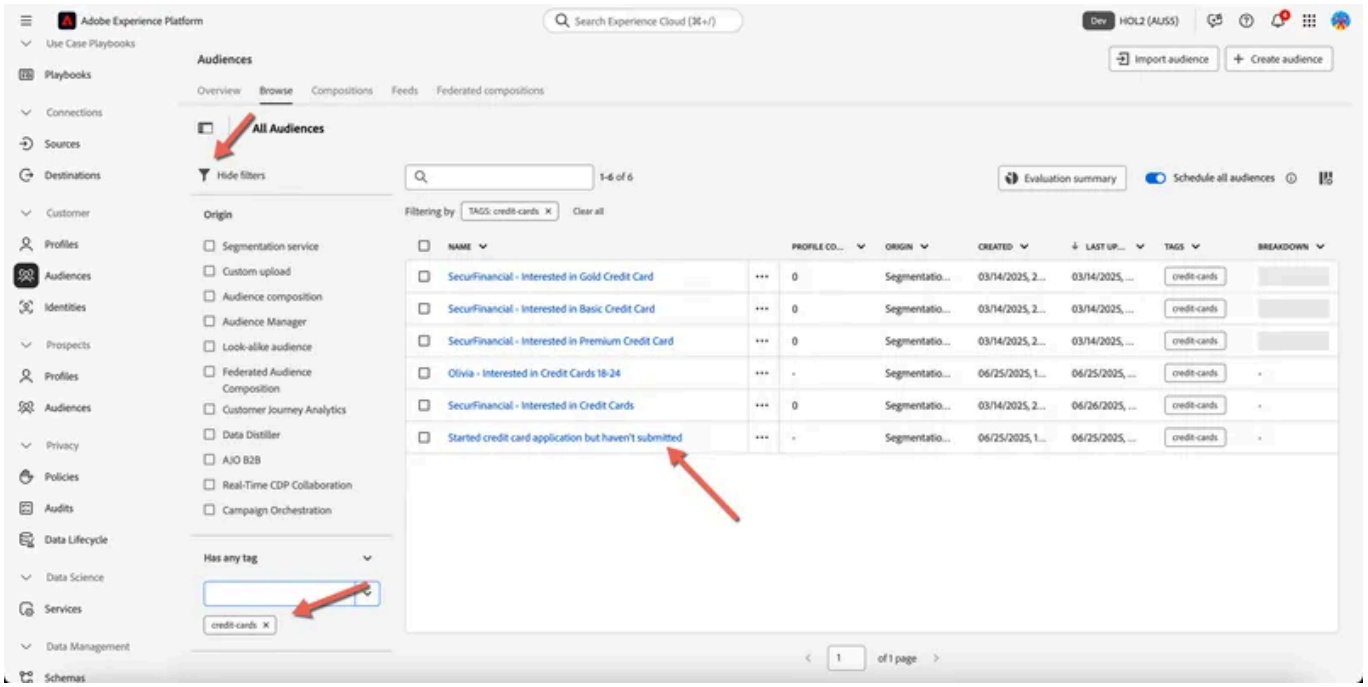
> You've created an audience that can be used to personalize the experience on the website in real-time!

2.3 View a sequential audience

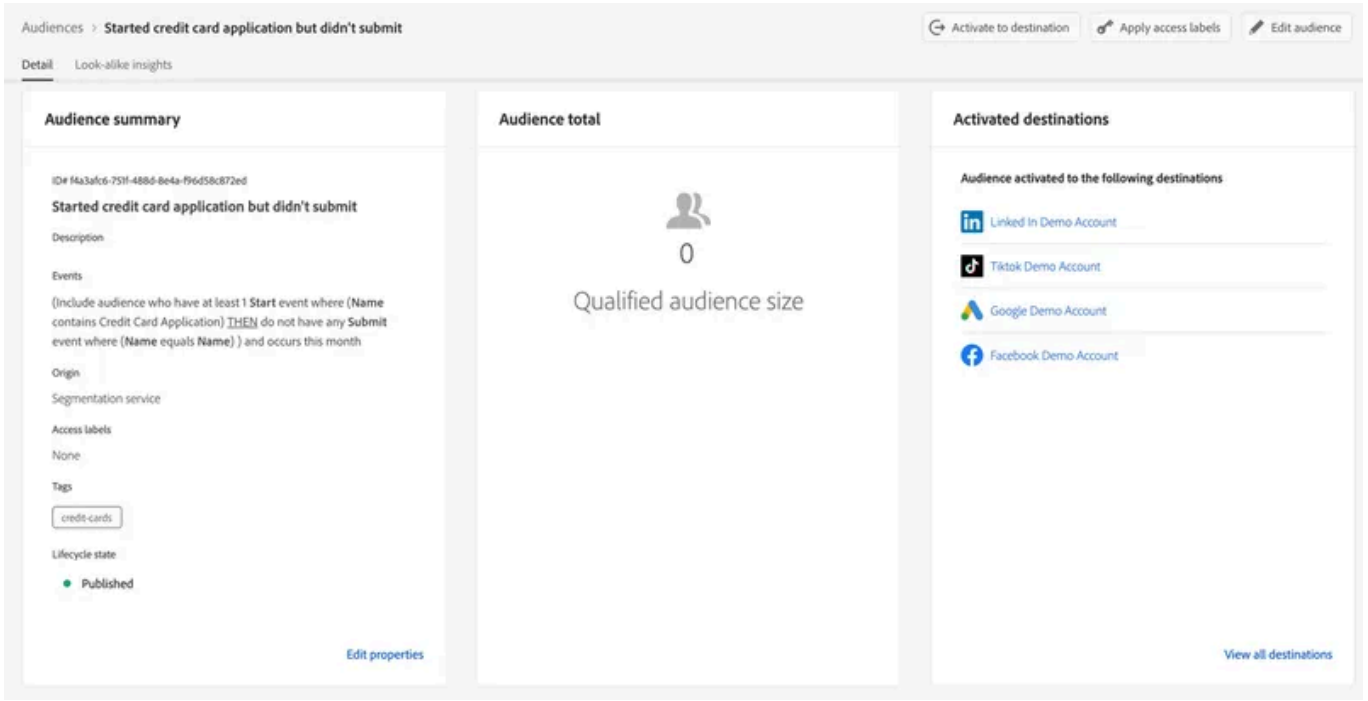
We also want to retarget customers on Social channels when they start the credit card application process but don't complete it, for this we can use Adobe's sequential segmentation logic which allows you to understand where customers are at within a specific process or journey.

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.

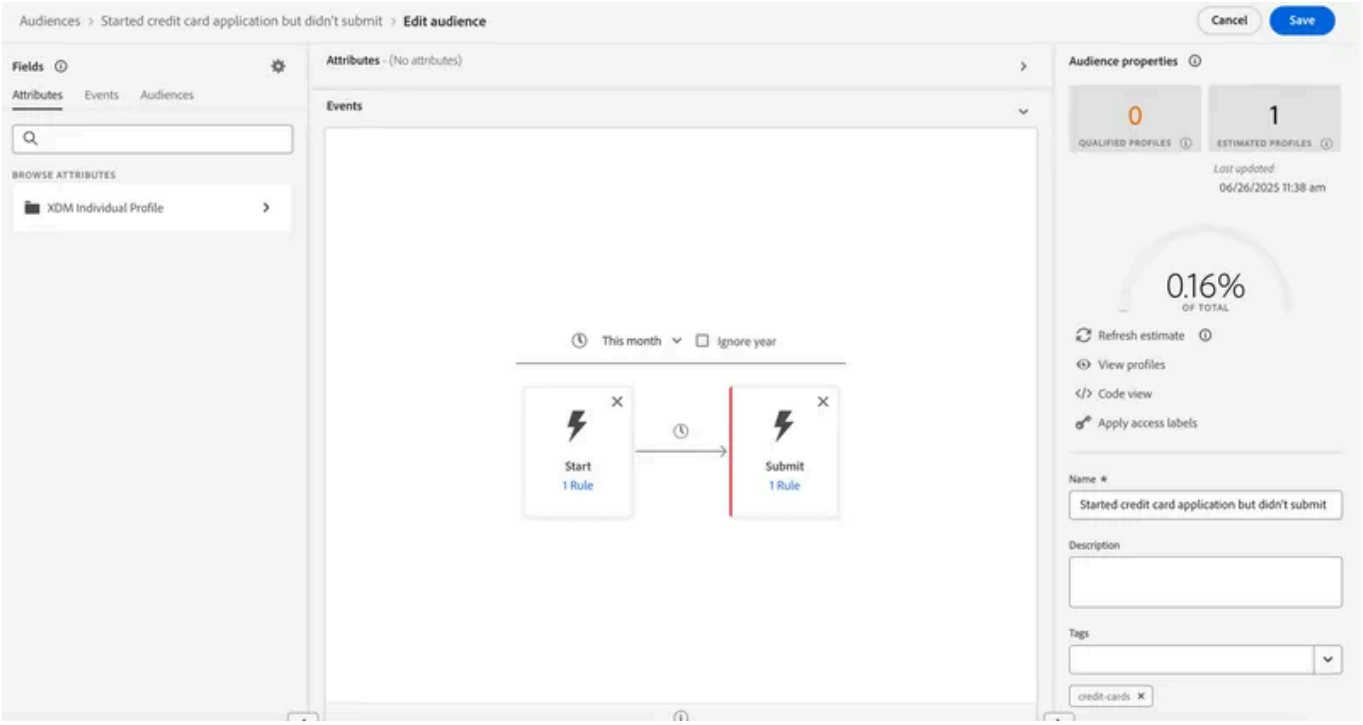
Click to open the **Started credit card application but didn't submit** audience.



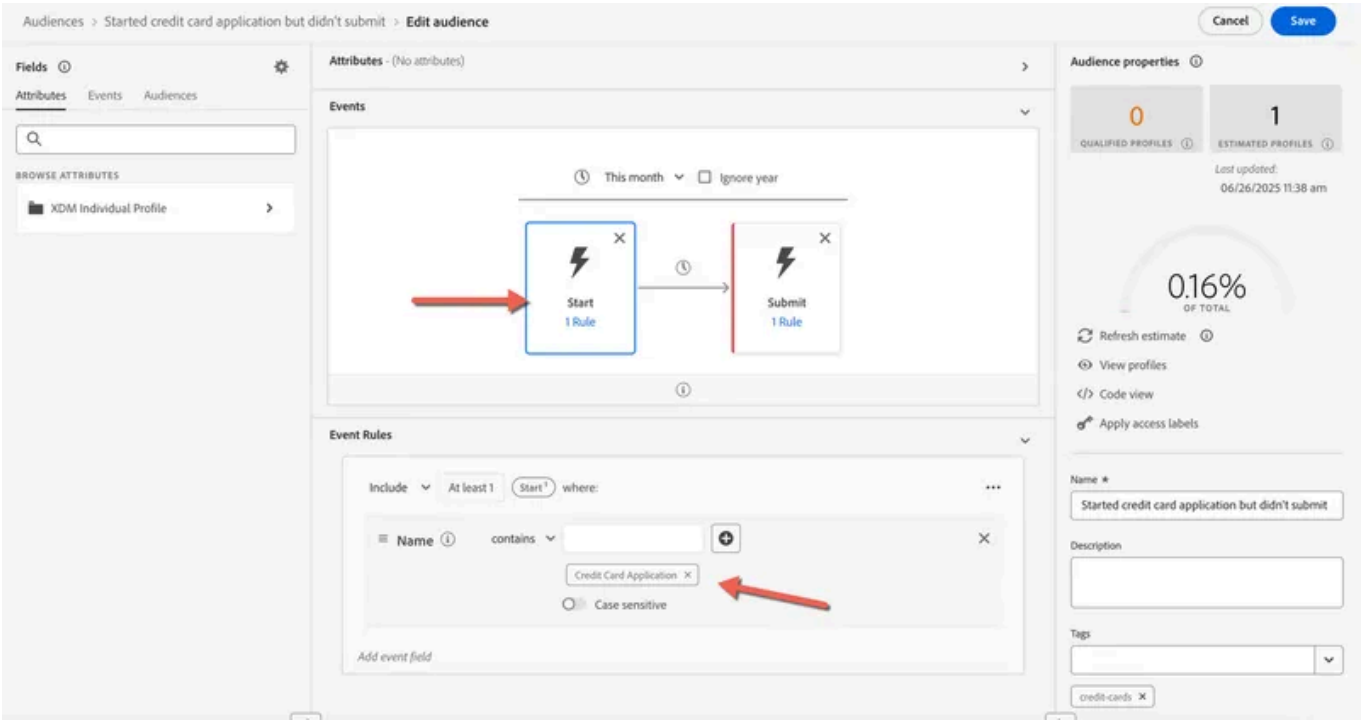
In the overview screen you can see a description of the audience logic, the current audience count along with the destinations that the audience has been activated to.



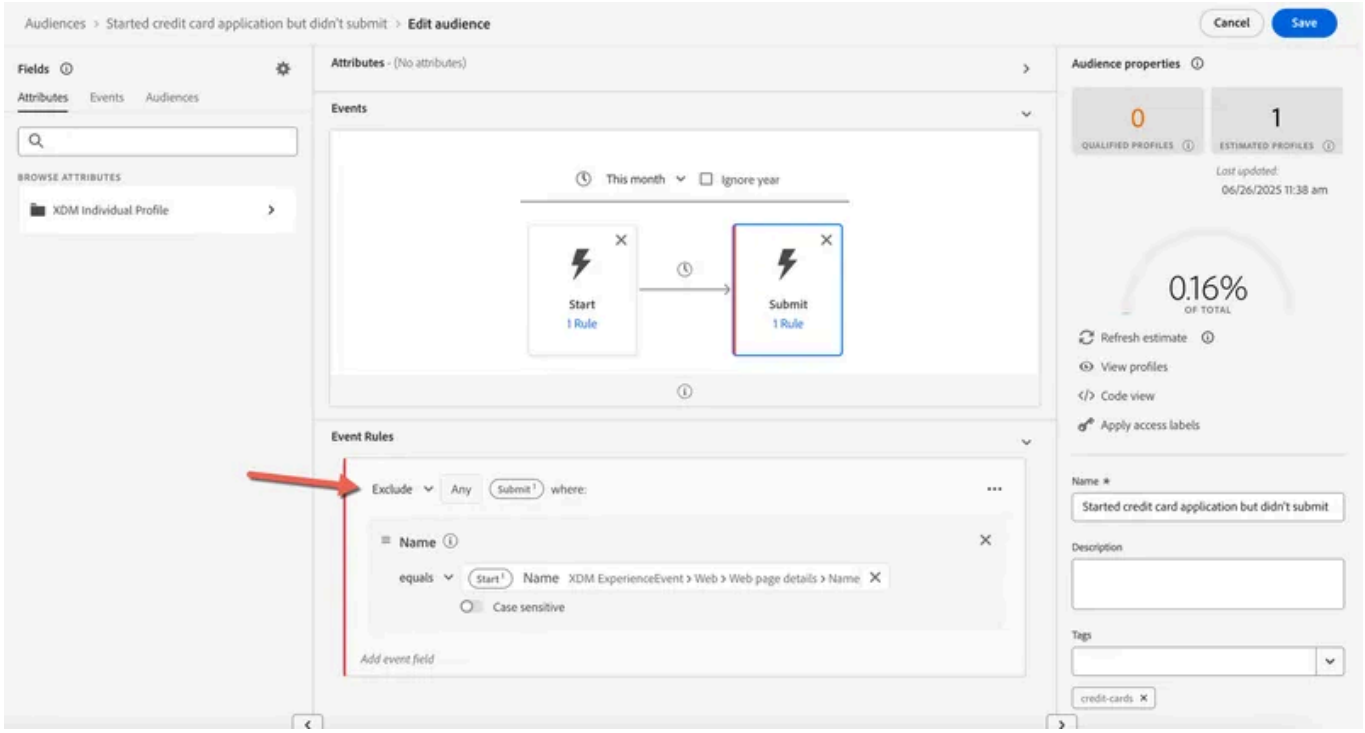
Click to **Edit audience.** In the audience builder you can see that two events have been chained together in a sequence, first the application start event followed by an application submit event.



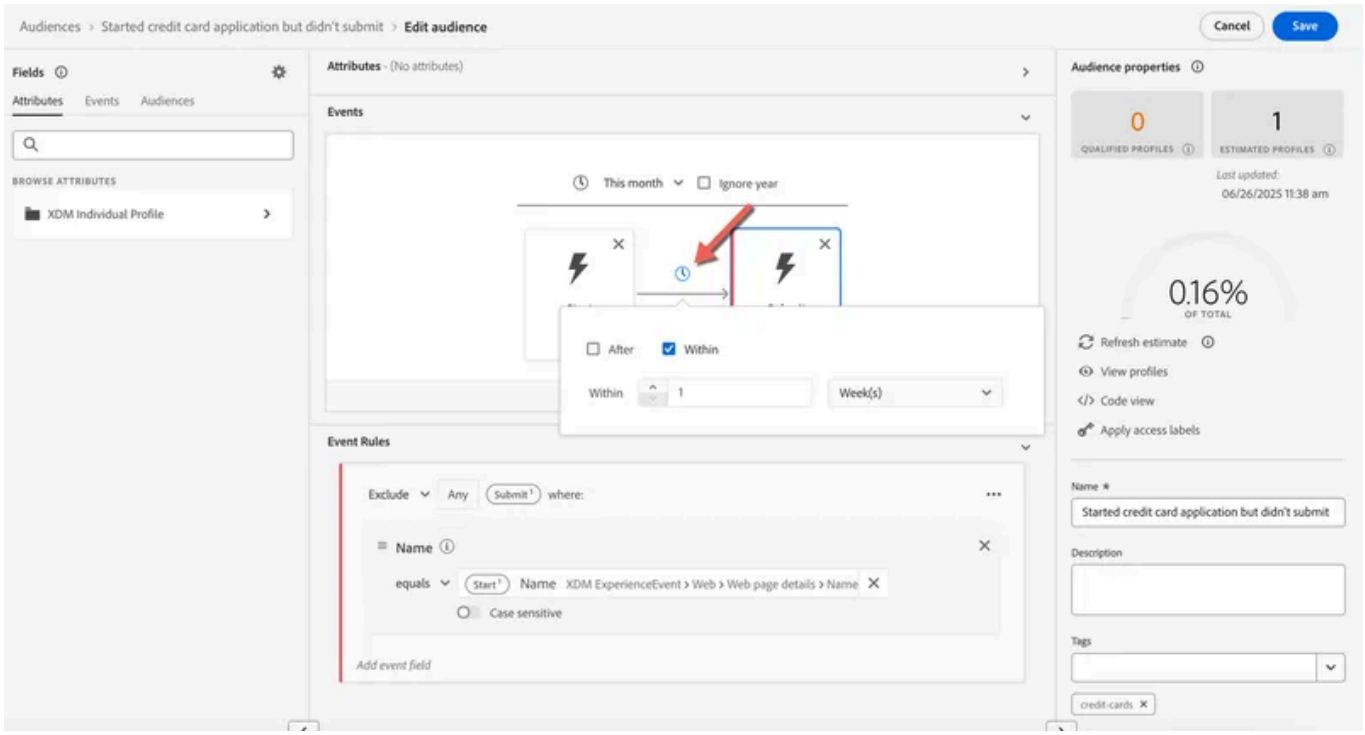
Click on the **Start** event to see the additional rules being applied to that event. Here we're filtering the application start to forms with **Credit Card Application** in the name.



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 occured 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.

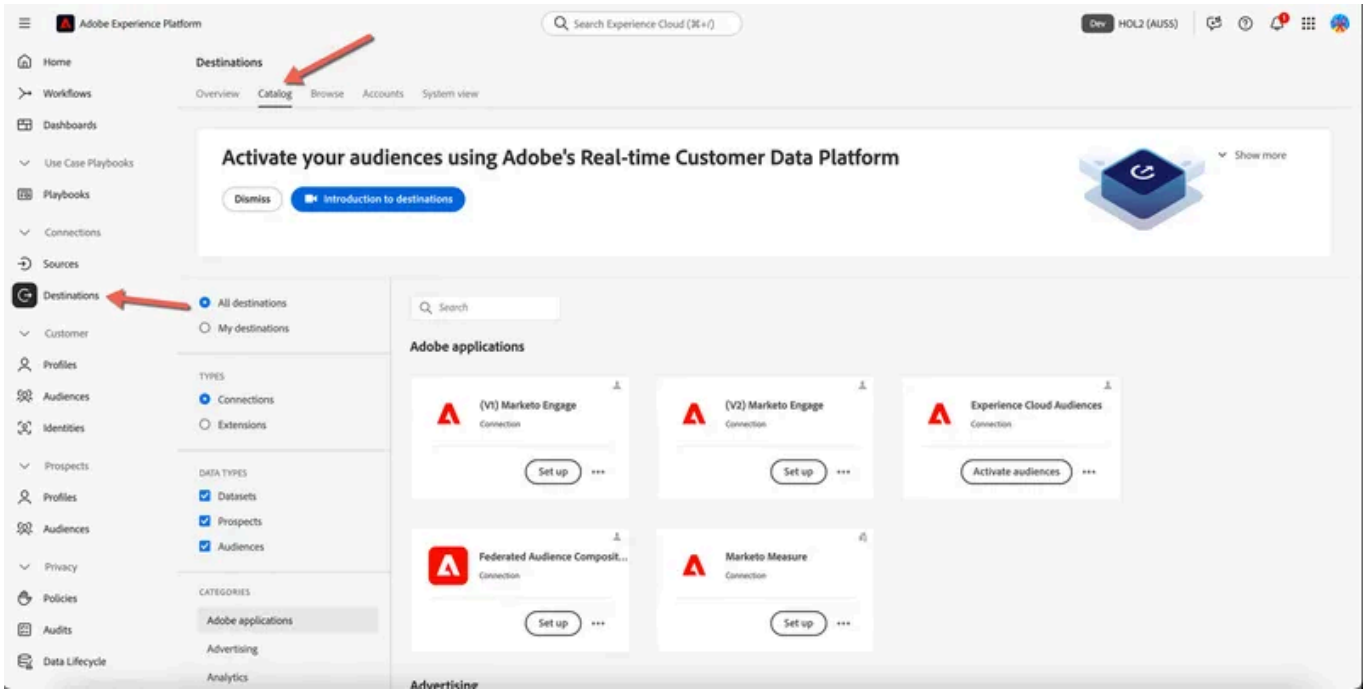
Click on **Cancel** to return to the Audiences screen.

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

2.4 Activate audiences

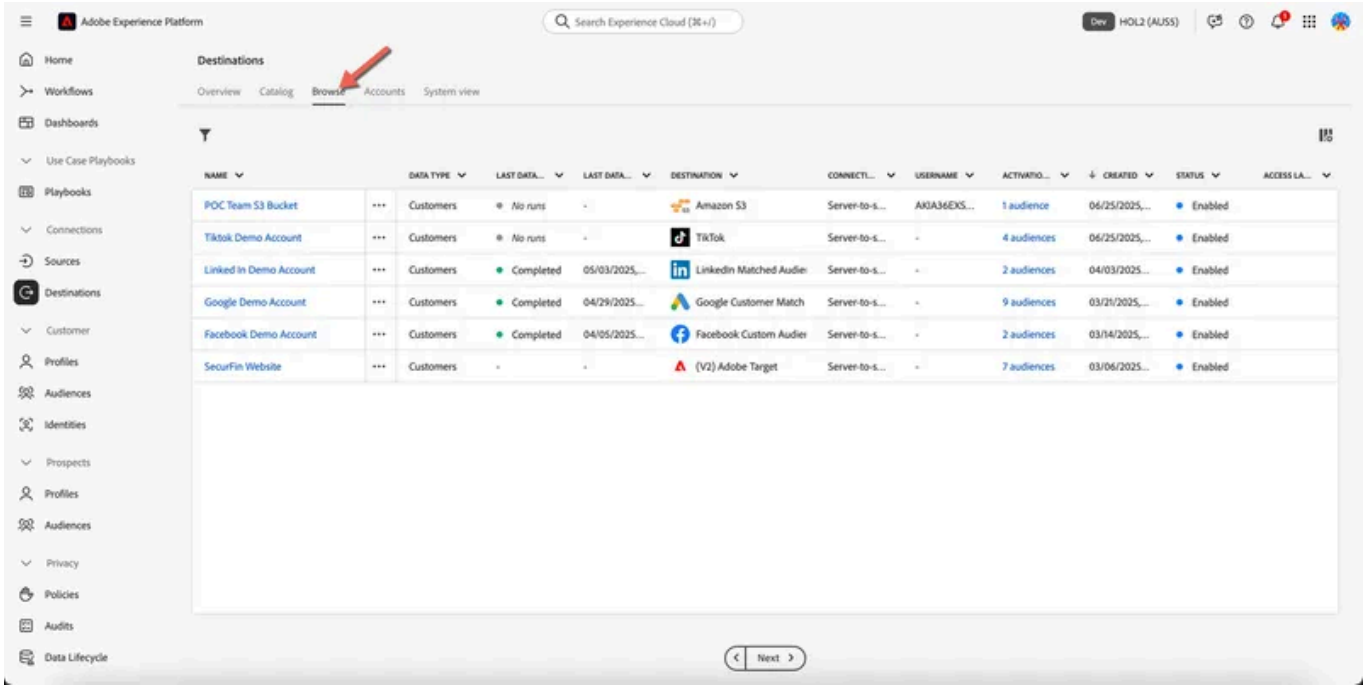
Once an audience is created, regardless of where the audience originates from we can activate them using RTCDP's Destination catalog.

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



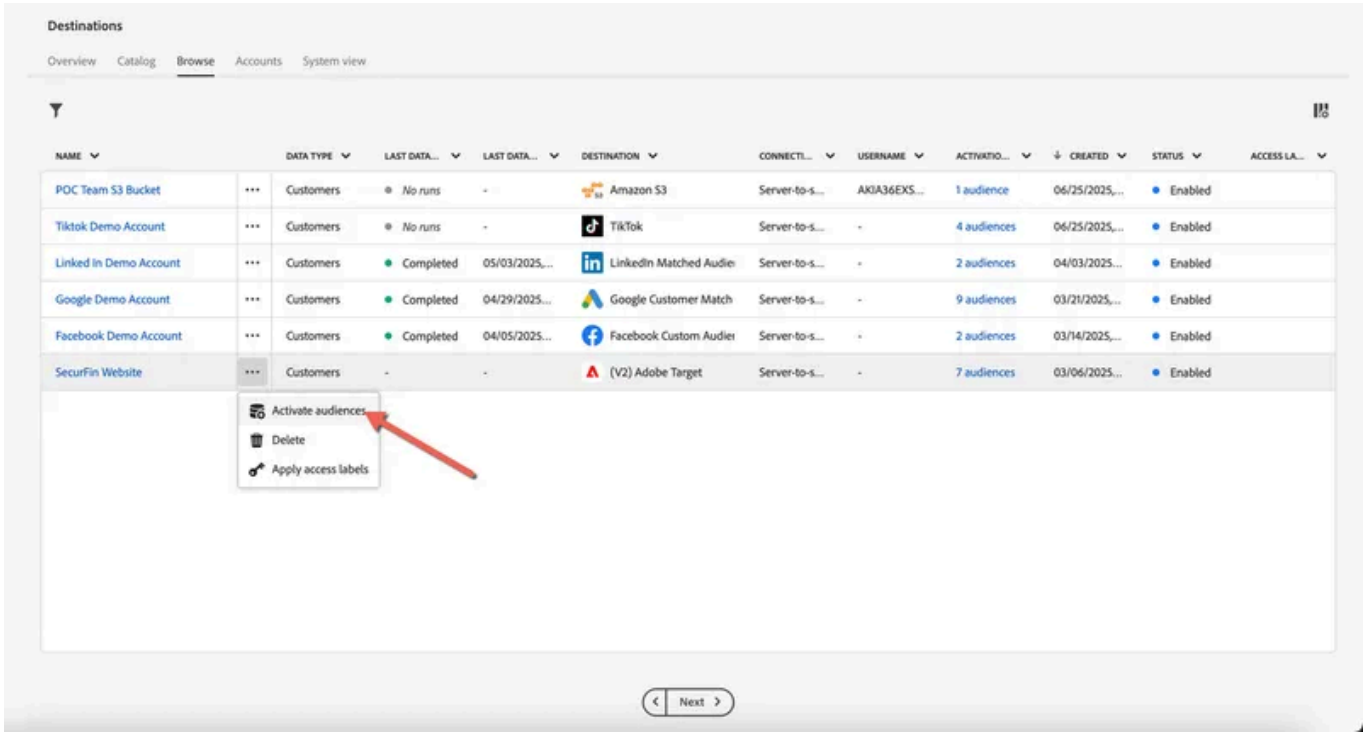
The catalog lists all of the available destination connectors, additional connectors can be created by partners using our Destination SDK. You can browse the list to see if the destinations your business uses are available.

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

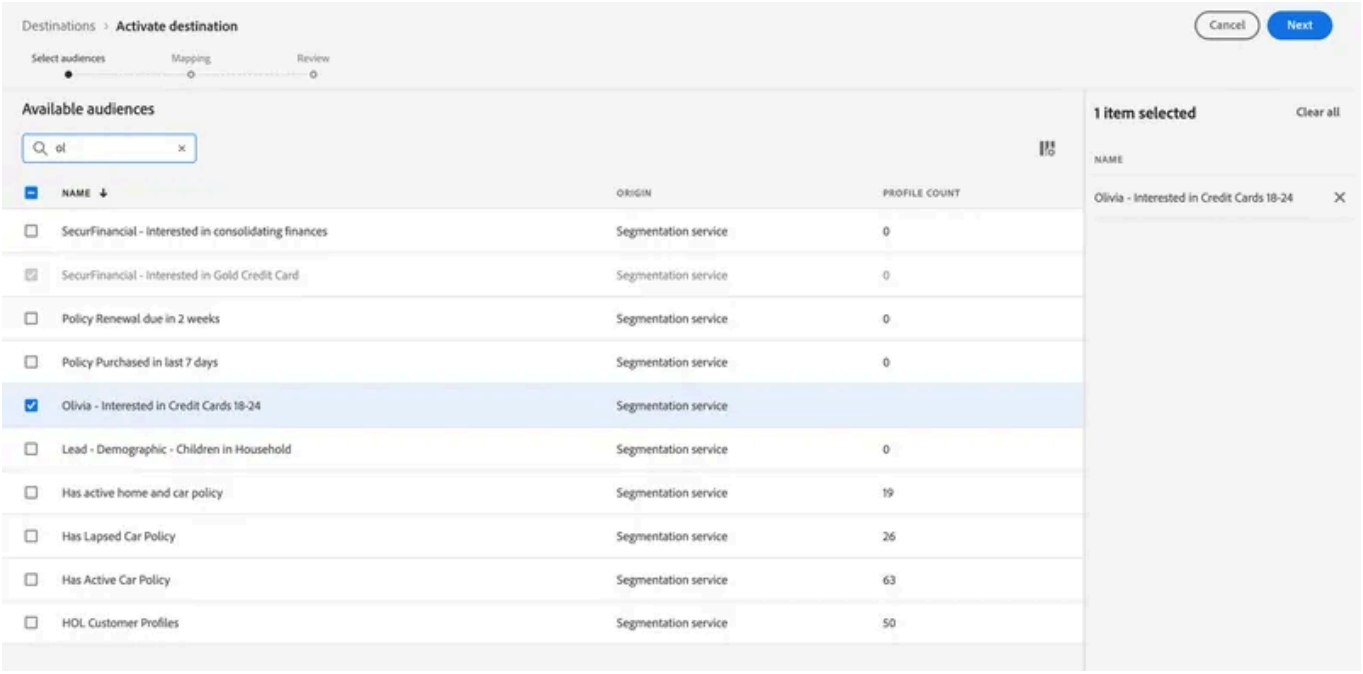


We want to use Adobe Target to personalize the landing page for customers coming from our paid media ads.

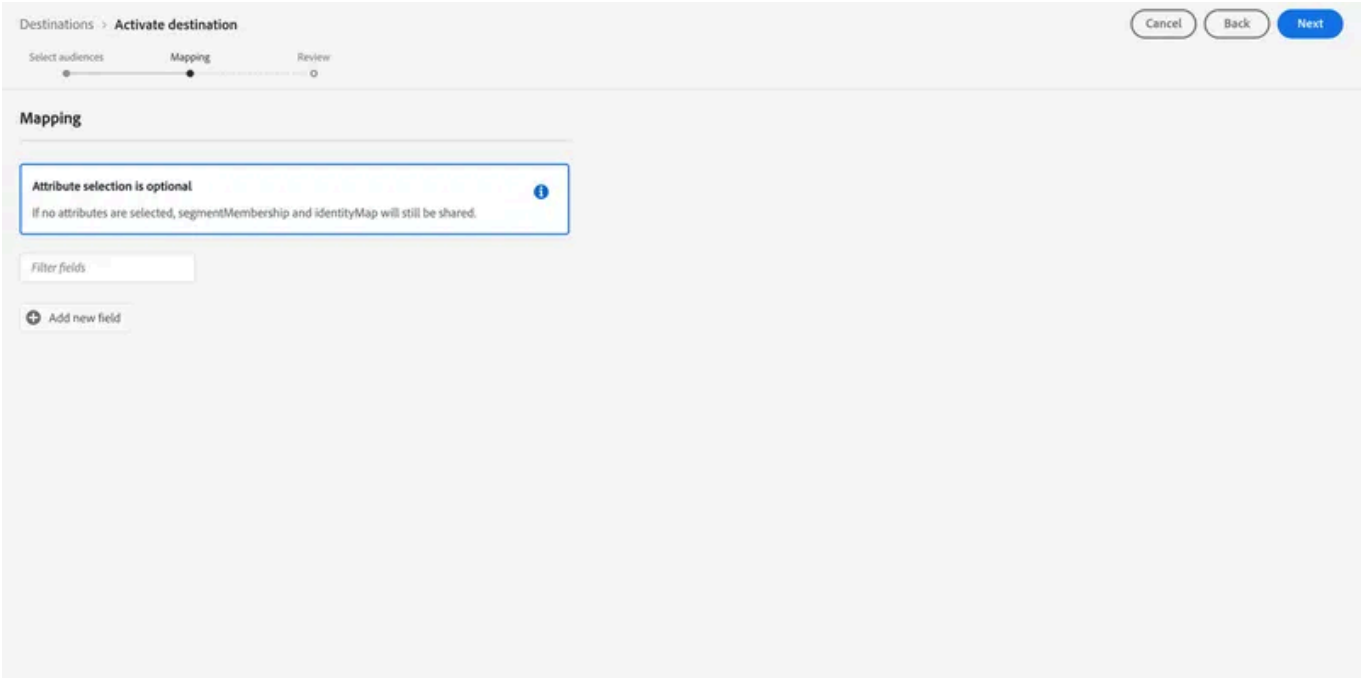
You can see Adobe Target is already connected. Click on the 3 dots next to the destination name and select to **Activate Audiences.**



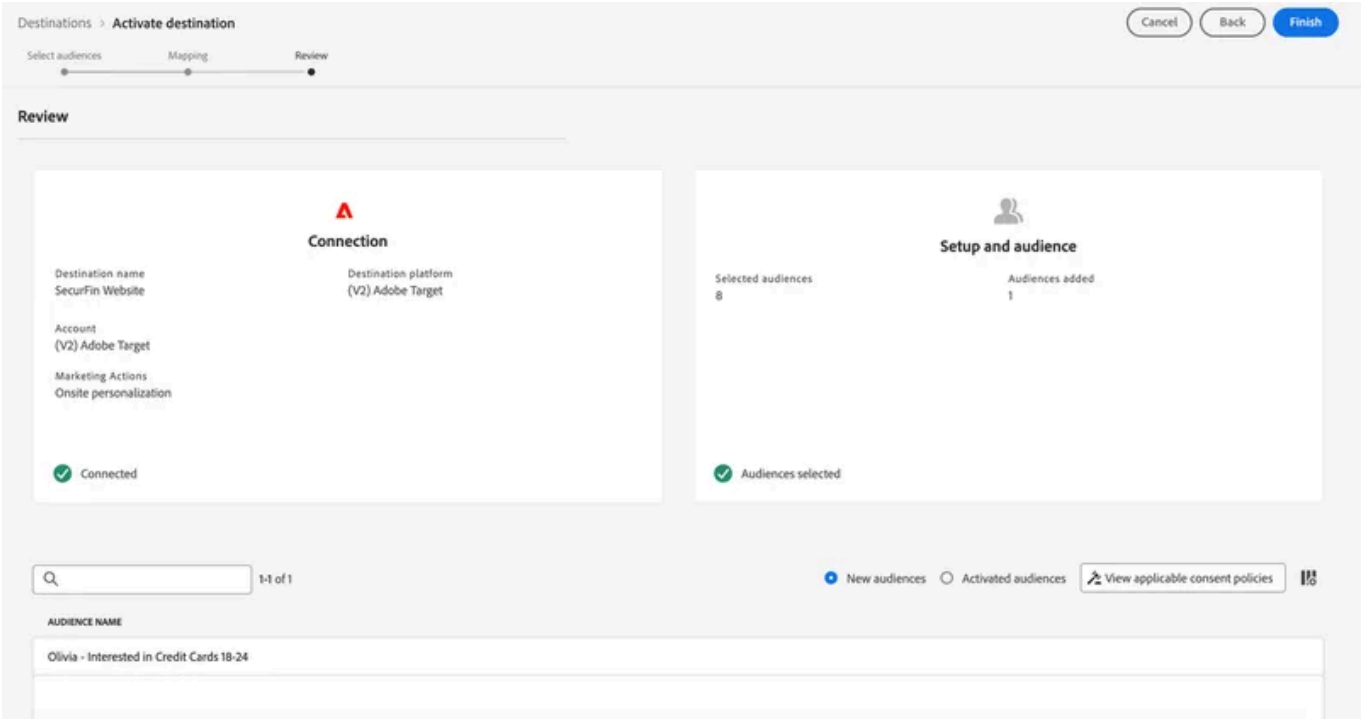
Look for the audience you created in Step 2.2, and **select it** and click **Next.**



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**

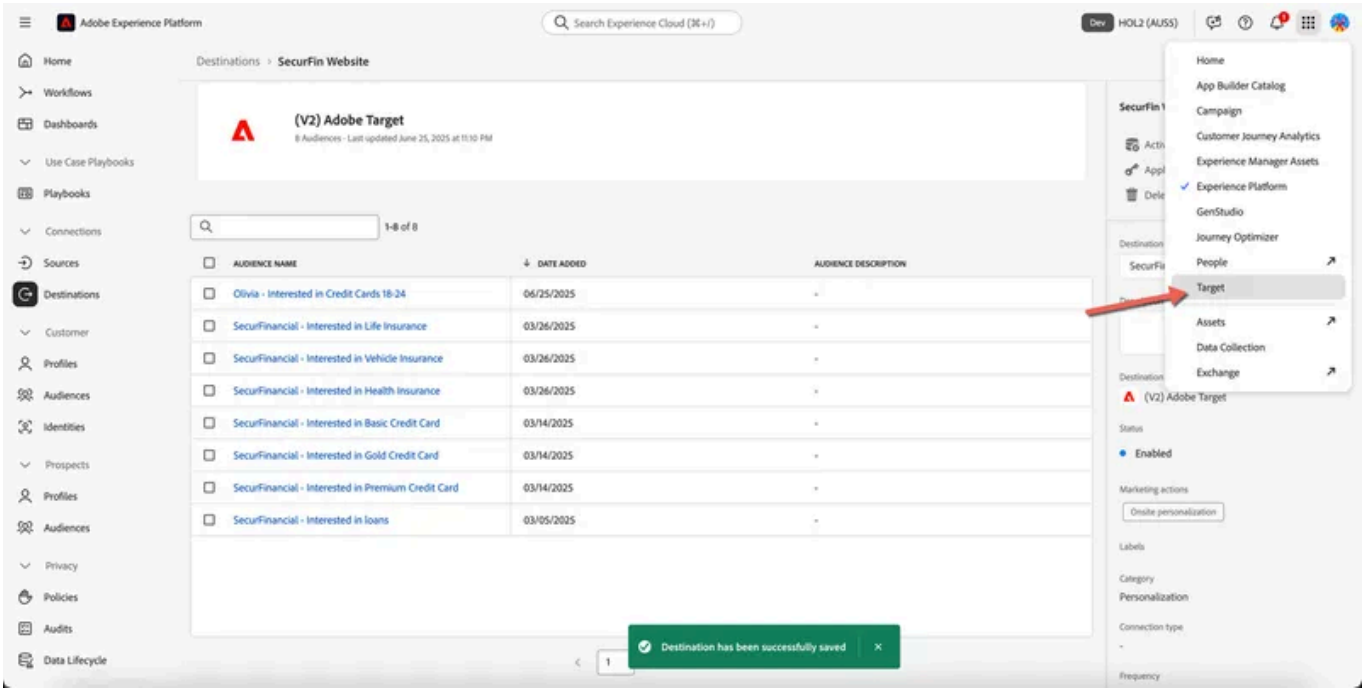


Review the activation details and click **Finish** to connect your audience with Adobe Target.

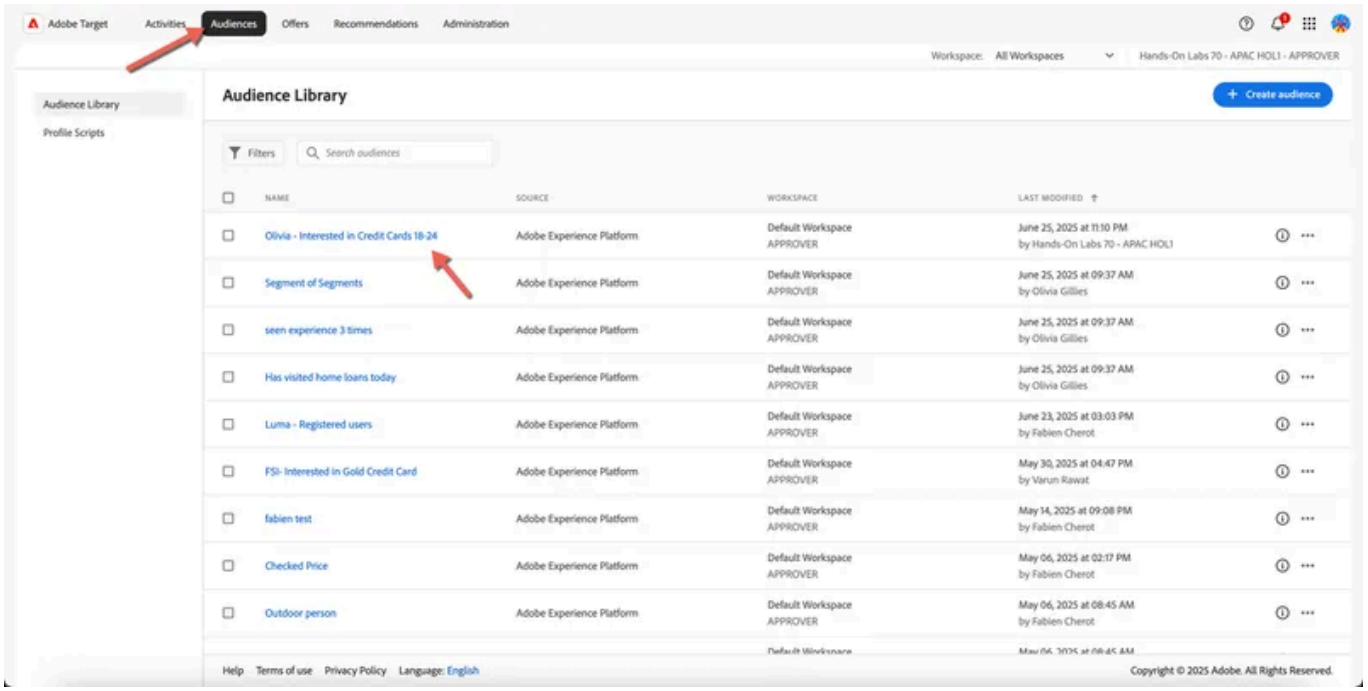


> In order to ensure consistency, destinations cannot be updated concurrently. If you encounter an error on the final step of the activation workflow this is likely the cause due to so many lab participants completing the same action, you can ignore this error or try the exercise again in a few moments.

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



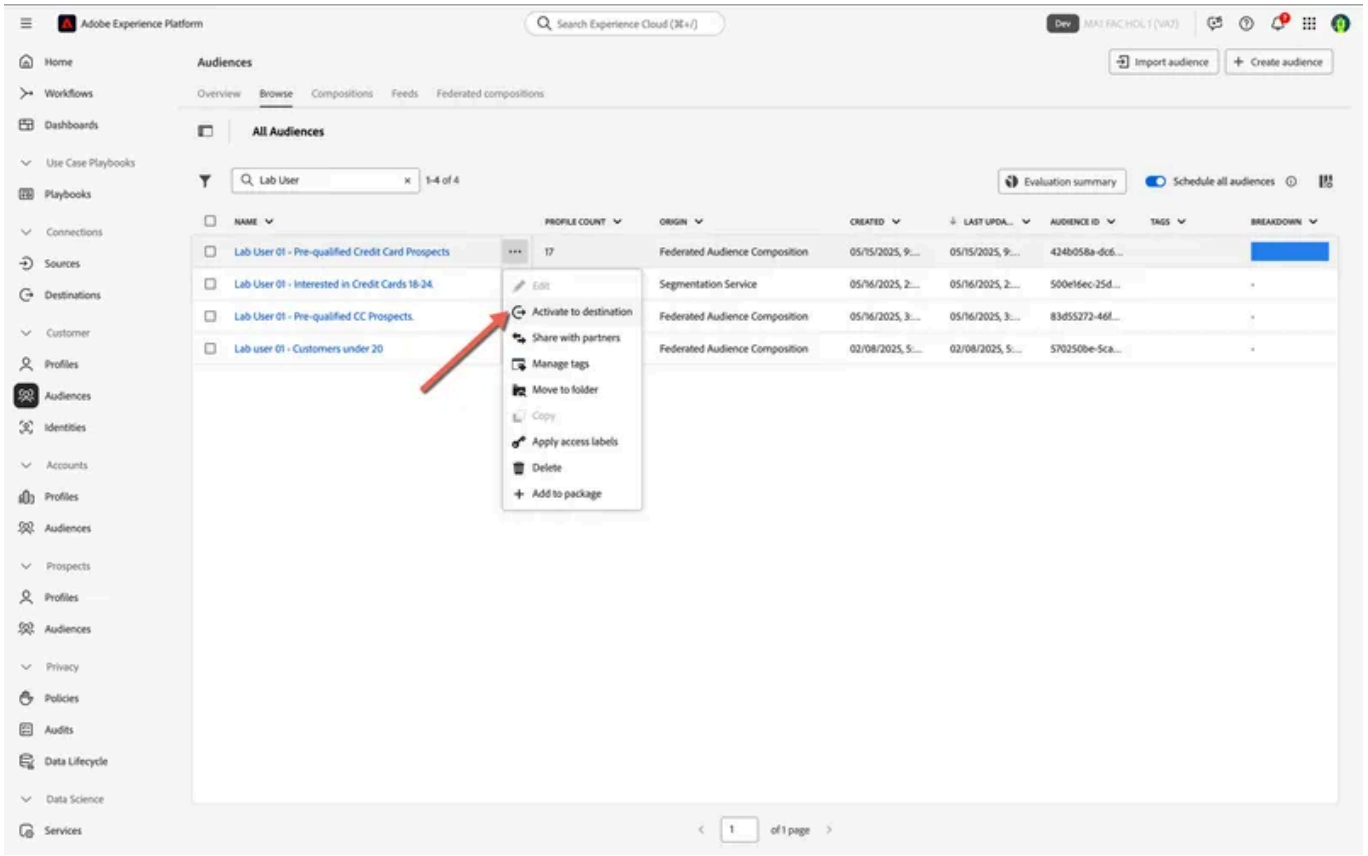
Switch to the **Audiences** tab in Target and filter to view **Adobe Experience Platform** audiences. You'll see your audience is available natively and ready to be used within a personalisation activity.



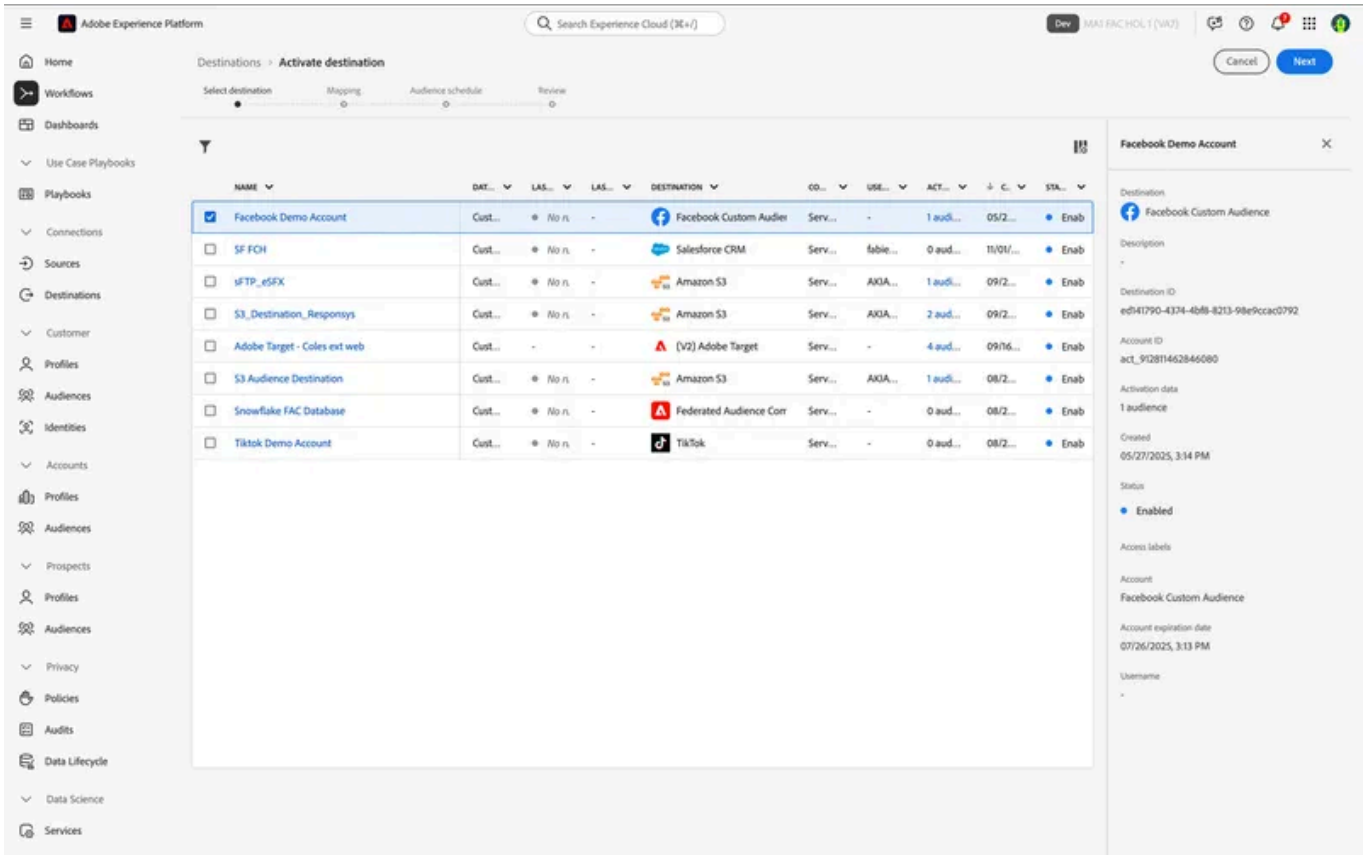
> This completes the exercise on Activation since we've already activated the retargeting audience to Meta. If you want to see that flow you can read through the guide below, all of the destinations follow the same step by step wizard for activation.

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

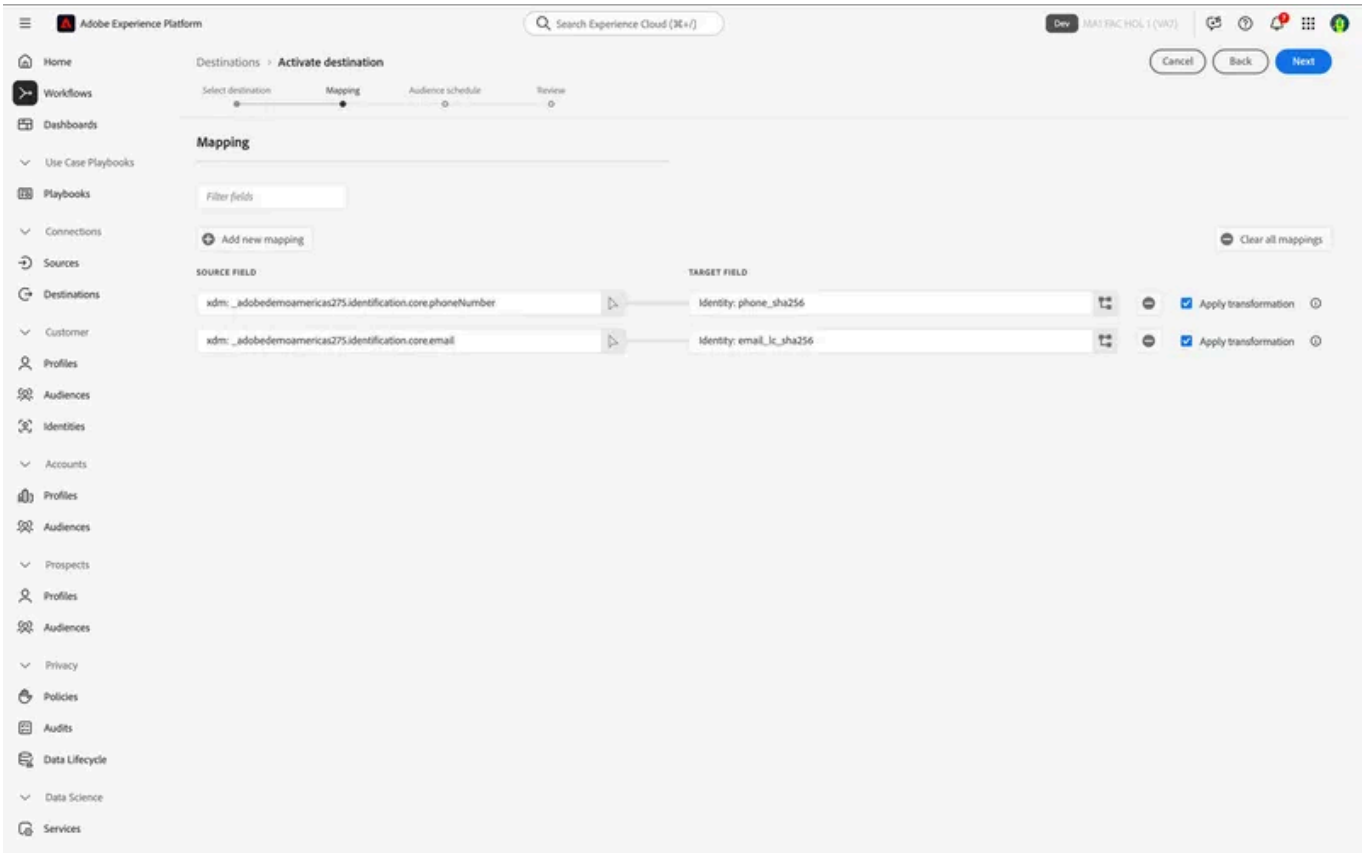
Return to **Experience Platform** and navigate to **Audiences**. Find your audience and click on the 3 dots next to it. You have the option here to **Activate to destination.** This is a just a different way to initiate the activation flow.



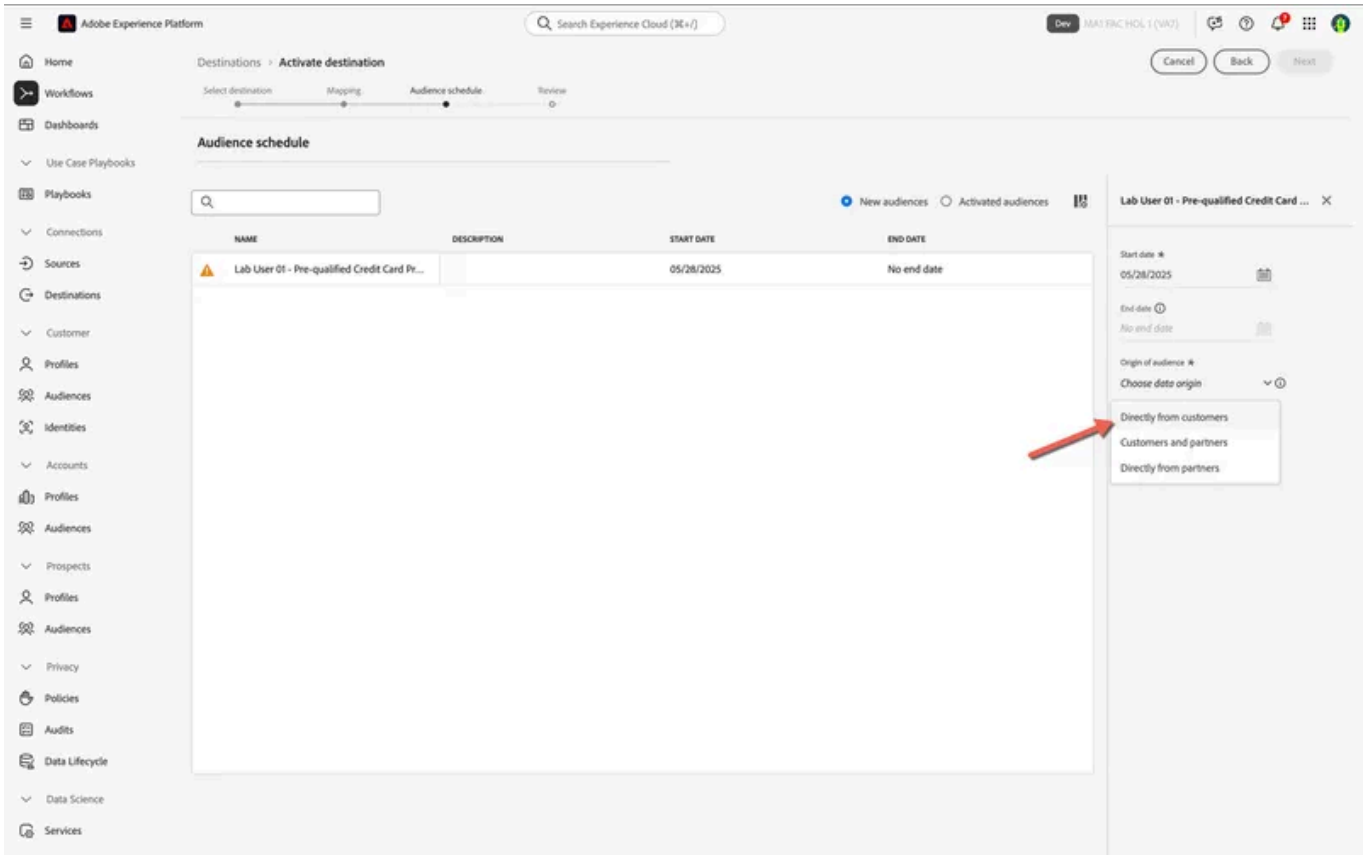
Select the **Facebook** destination and click **Next**



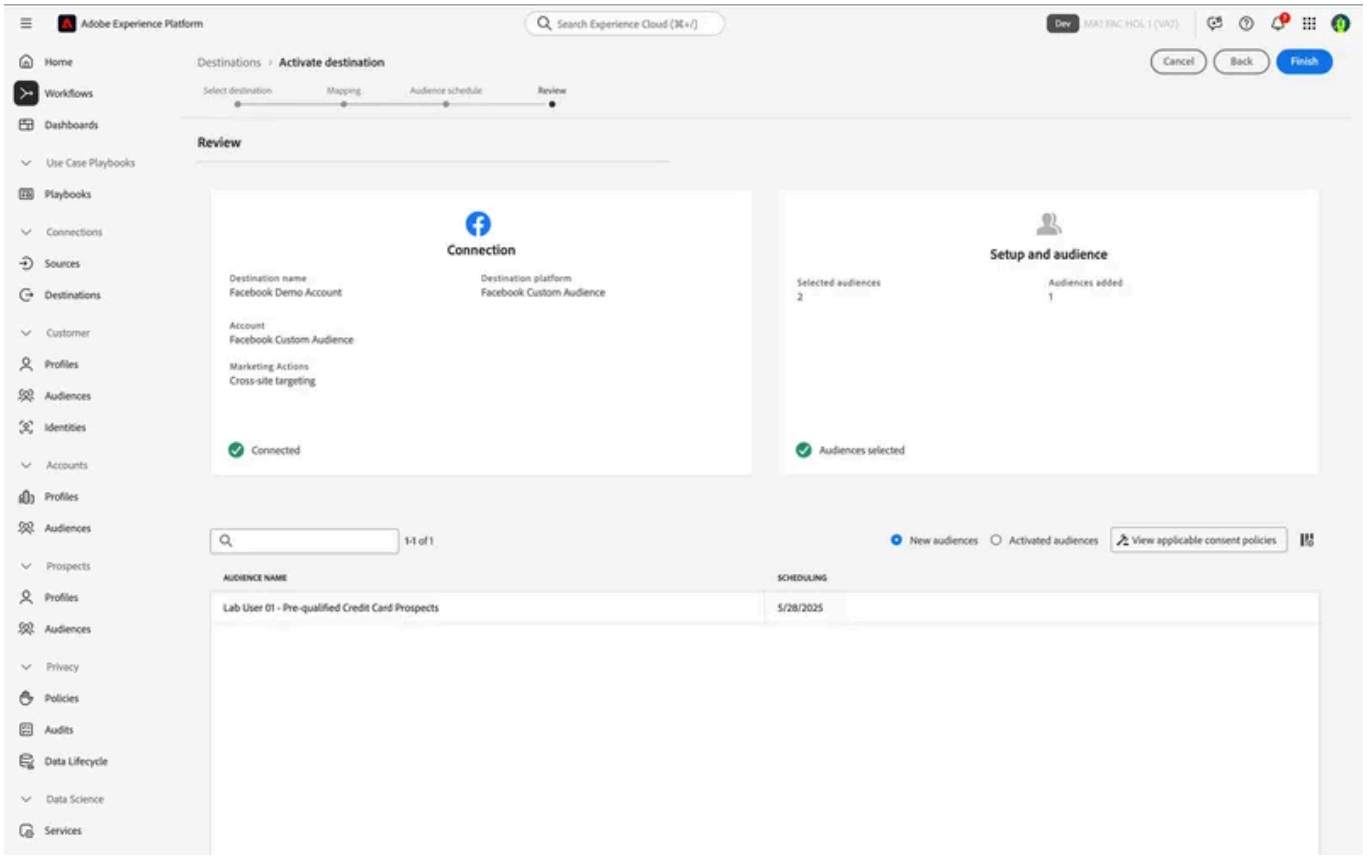
The mapping step controls how we reconcile profiles between Adobe and Meta. This is configured the first time you activate an audience and does not need to be updated each time. We are reconciling on Hashed Email and Hashed Phone number for the best chance at matching. Click **Next**



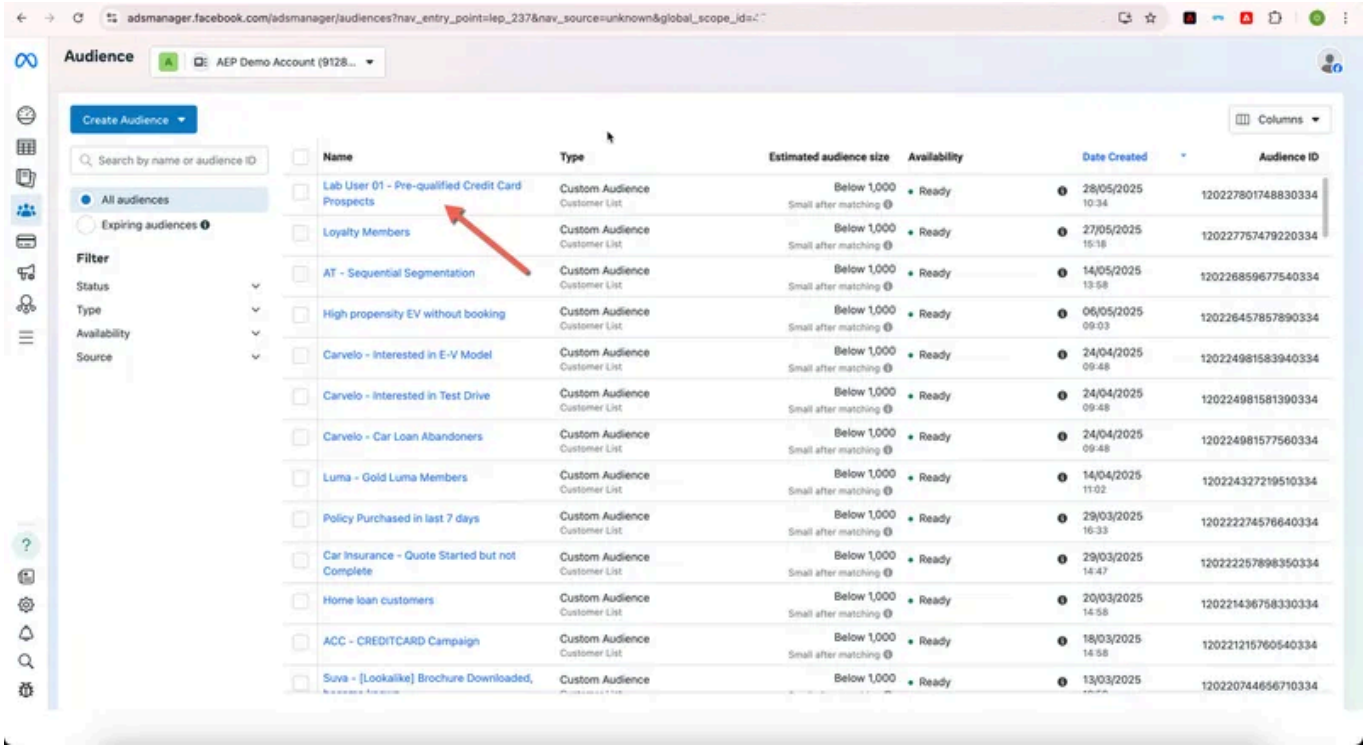
There is one extra step that is required by Meta, and that is to declare whether the **Origin of audience** is first party coming directly from your customers or partner data or both. Select that the audience has come **directly from customers** and click **Next**



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



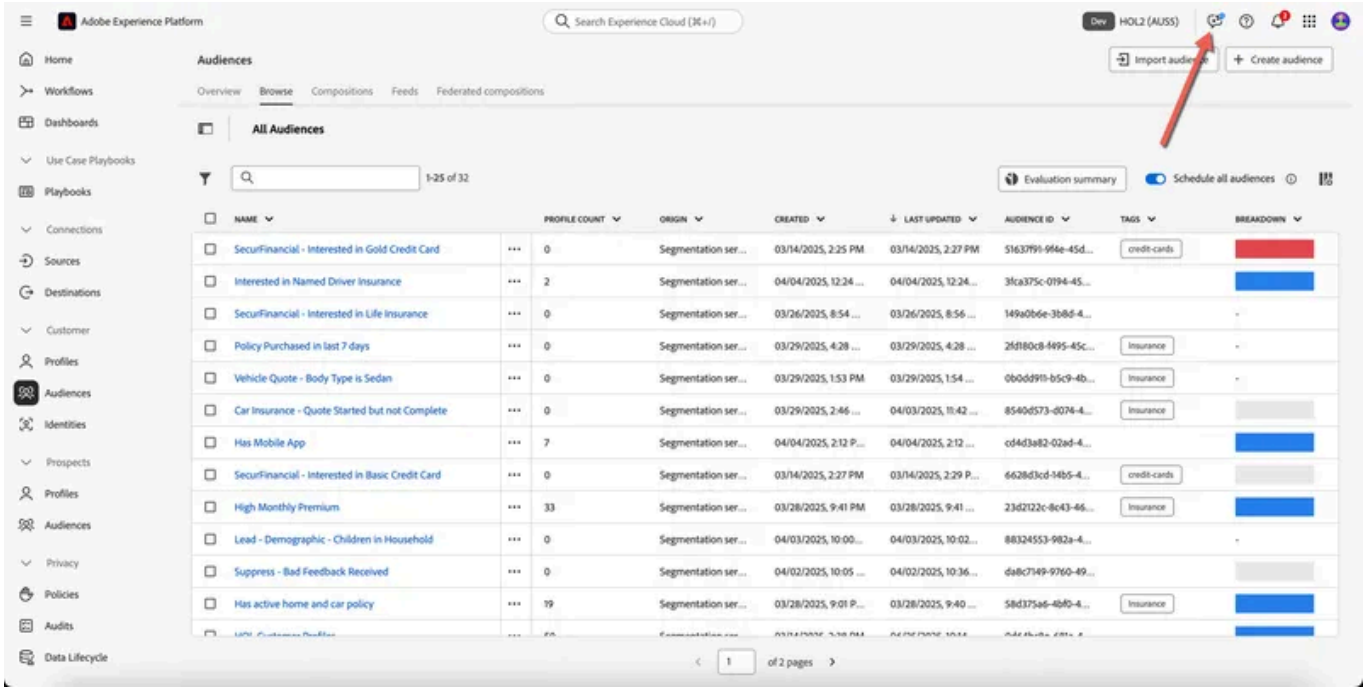
Your audience will appear in Meta Ads Manager within their Audiences list. Data will start flowing into this audience in streaming fashion, starting with a backfill of existing profiles and then any new profiles as they qualify.



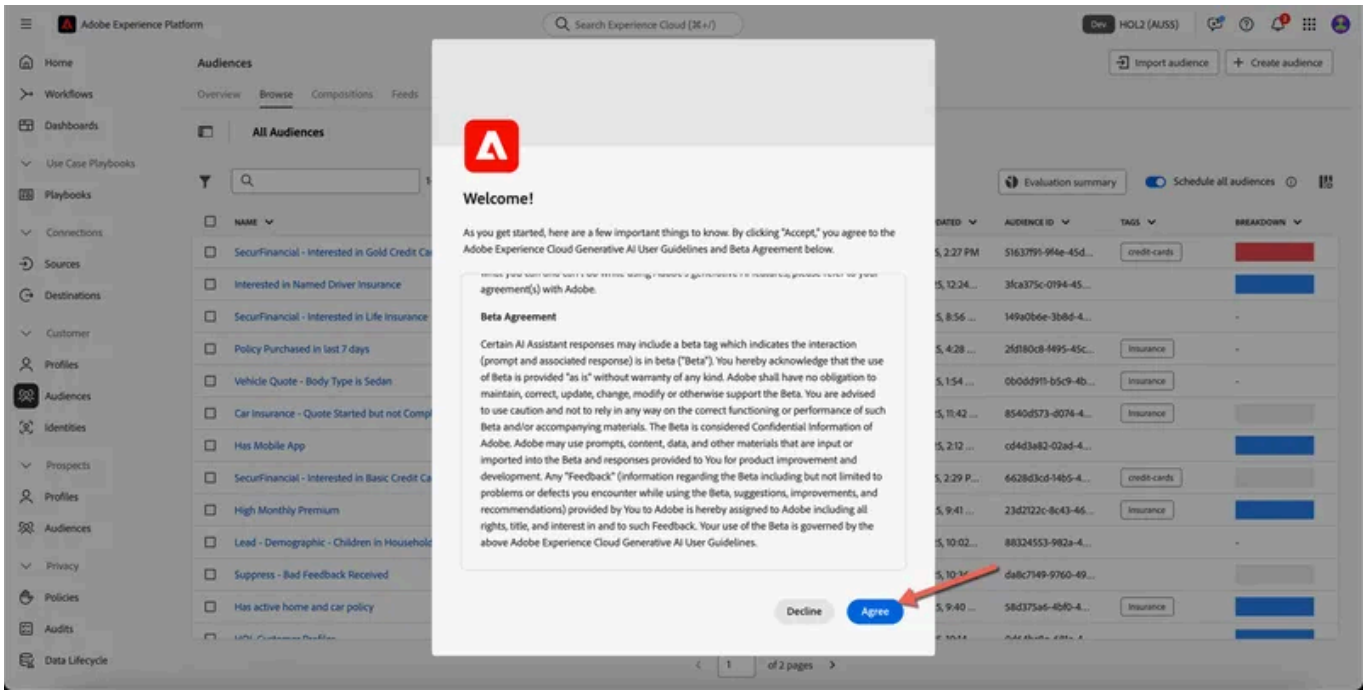
2.5 AI Assistant

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.

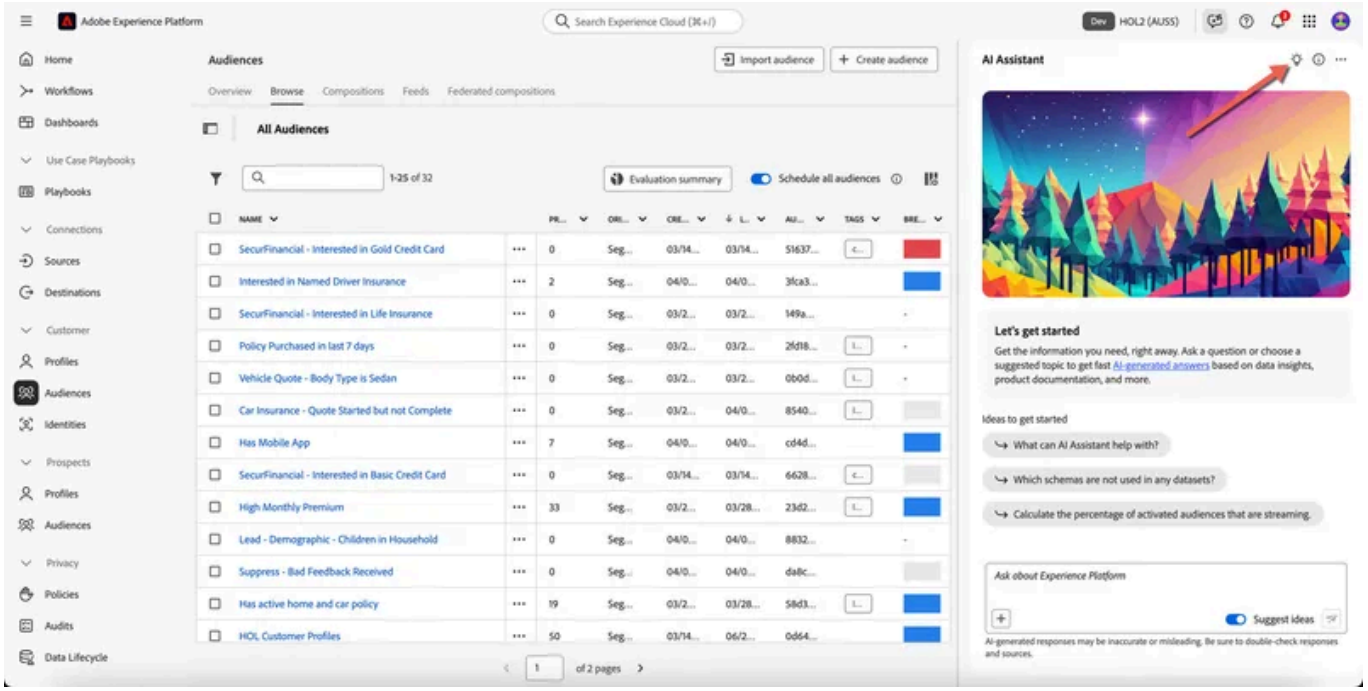


If prompted, review and accept the Beta Agreement to enable AI Assistant.

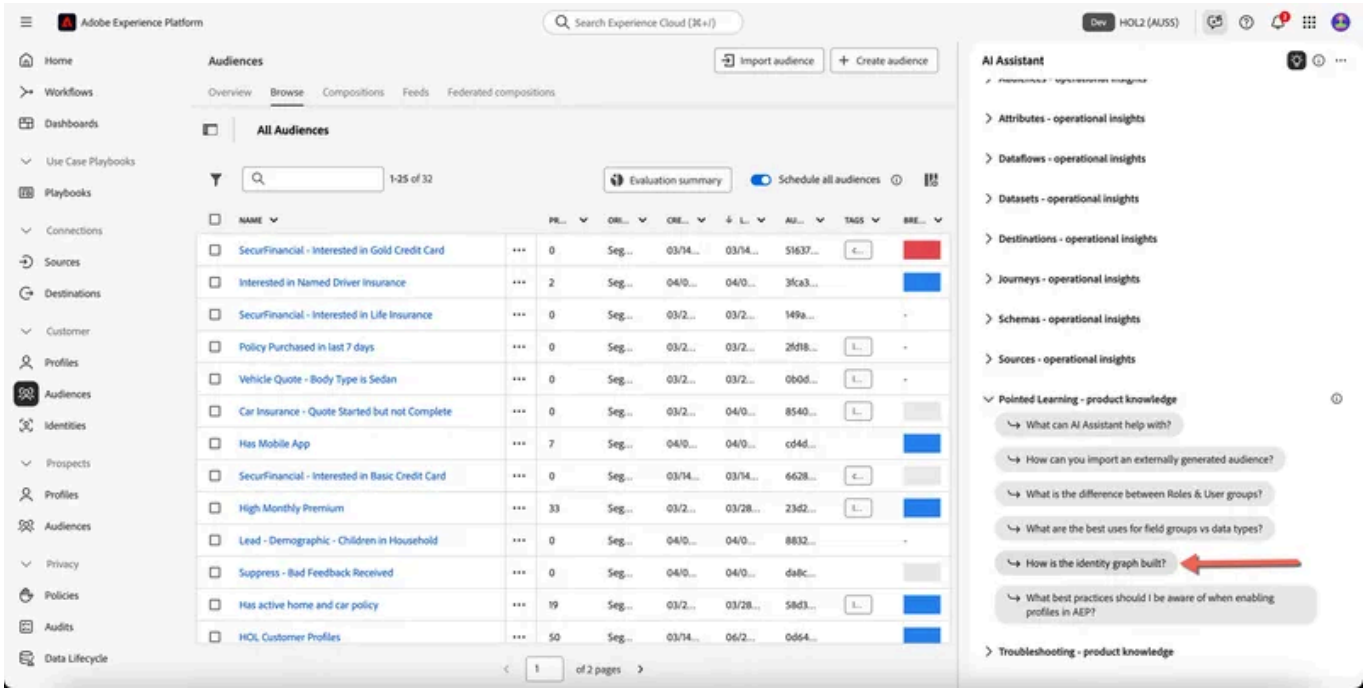


Once enabled, AI Assistant will be available for use across Adobe Experience Platform and Platform-based apps like Adobe Journey Optimizer, Adobe Customer Journey Analytics, and Adobe Real-time Customer Data Platform.

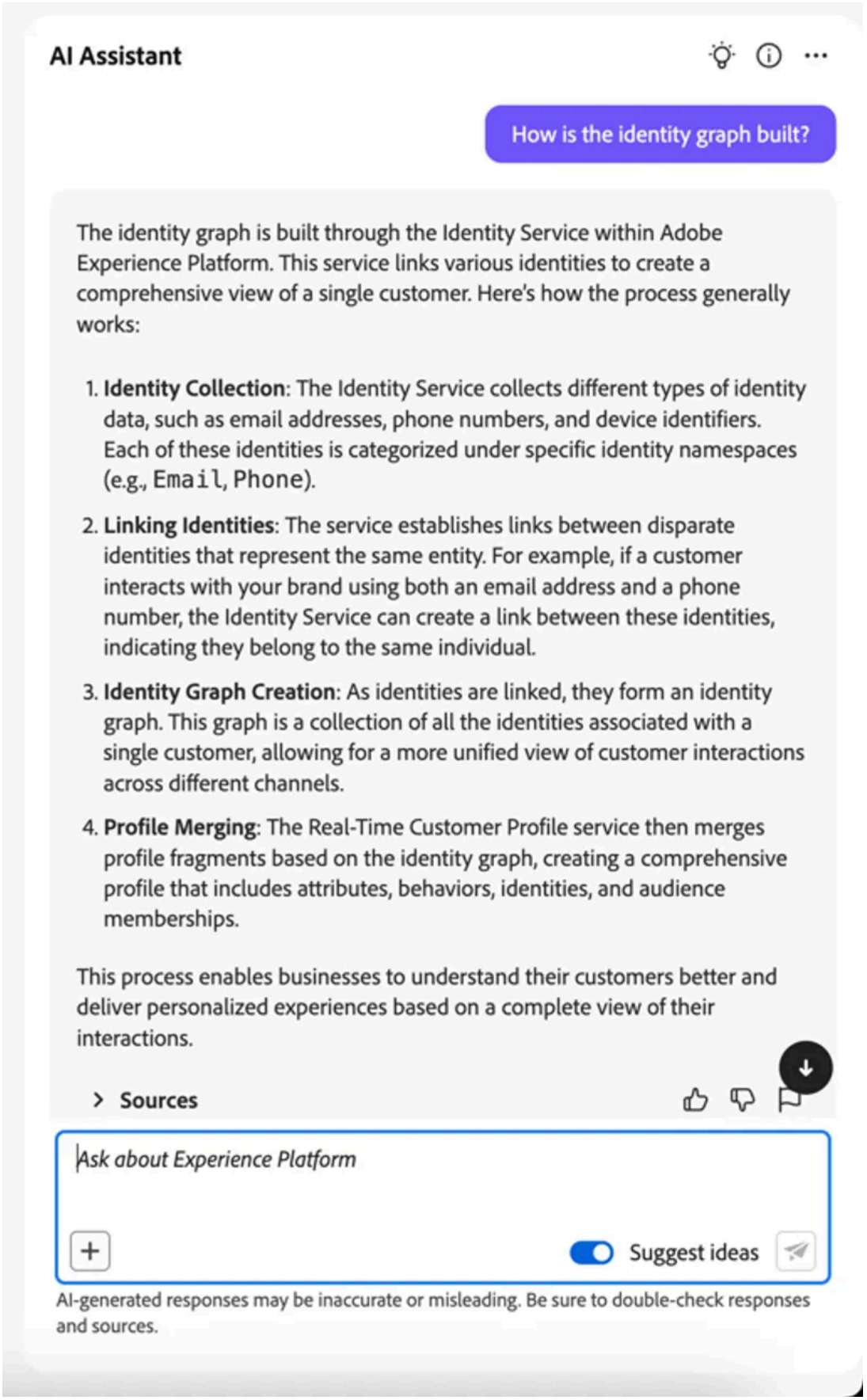
Click on the lightbulb in the top right to open the discovery panel, here you'll find some suggestions for the types of prompts by category that AI Assistant can help you with.



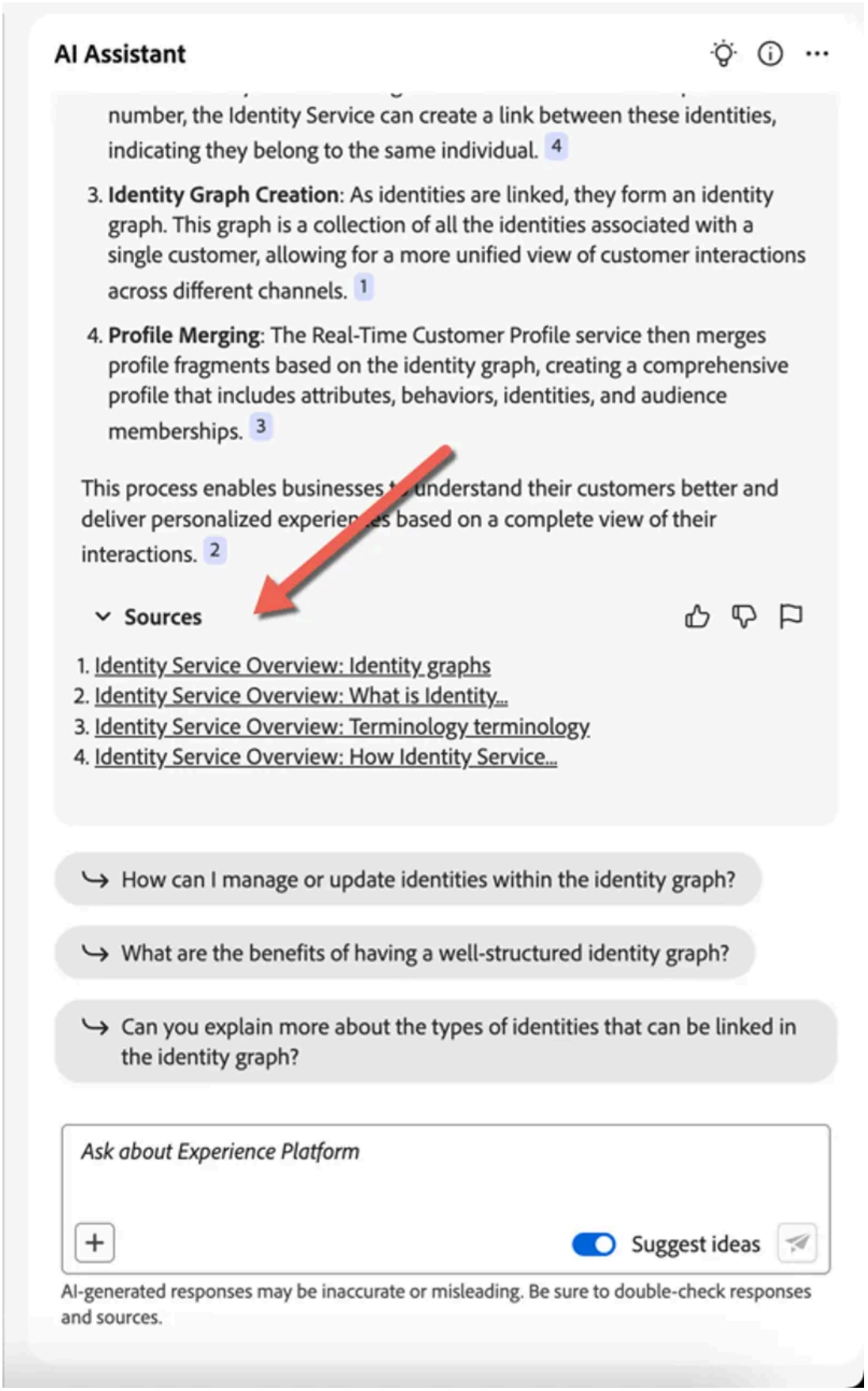
Navigate to **Pointed Learning** and click on the prompt: **How is the identity graph built.**



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.

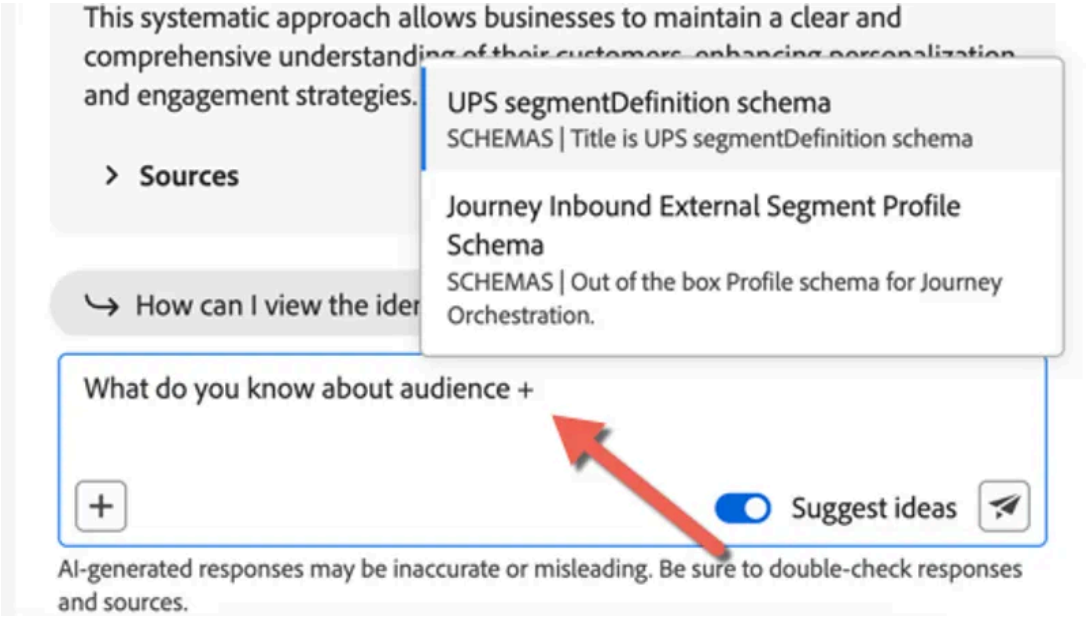


To verify the response provided you can review the **Sources** that are listed below the response.

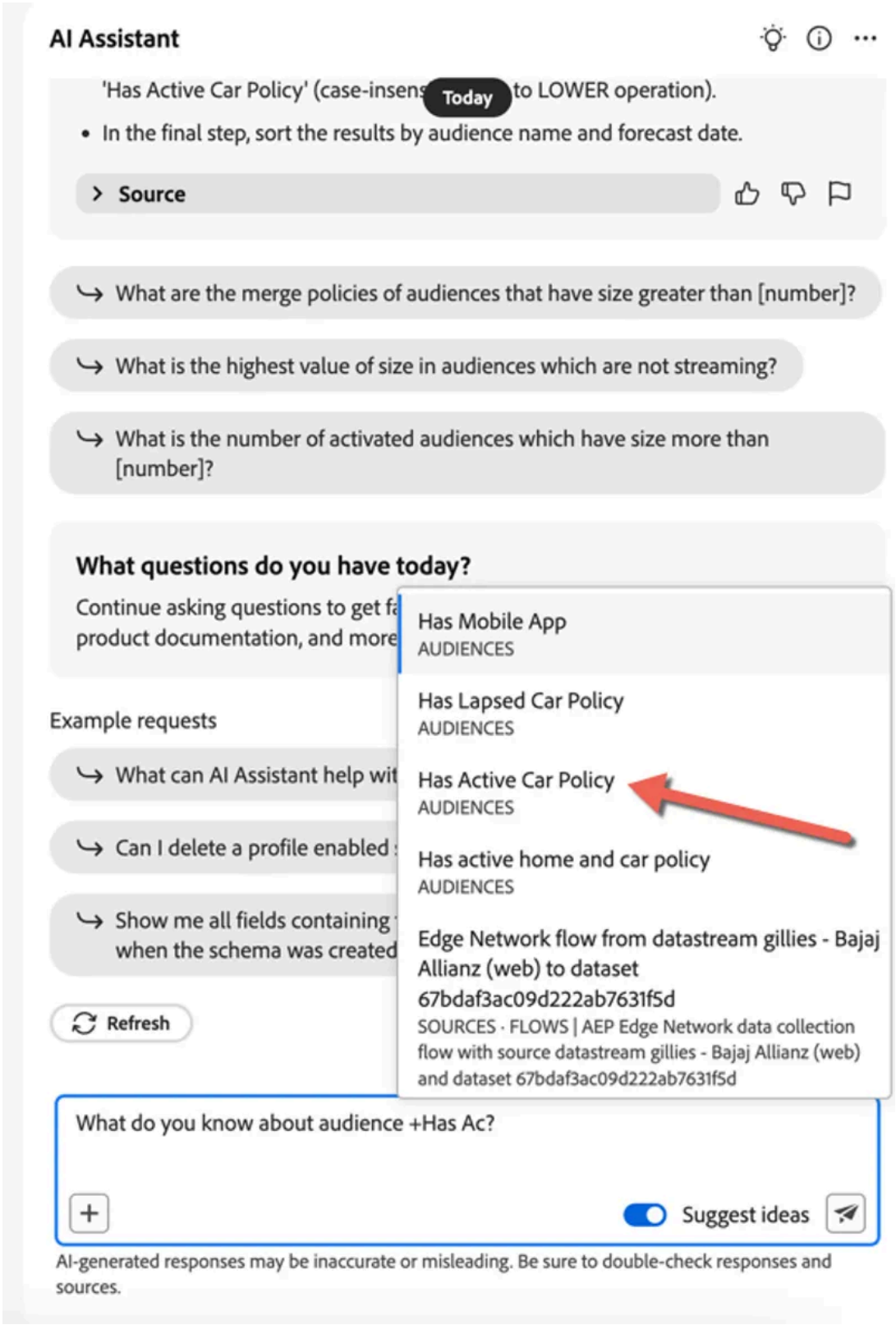


AI Assistant is also able to help with Operational Insights based on what is configured within your sandbox. In the AI Assistant input field, begin typing "**What do you know about**

audience +", the + will open the object selector.



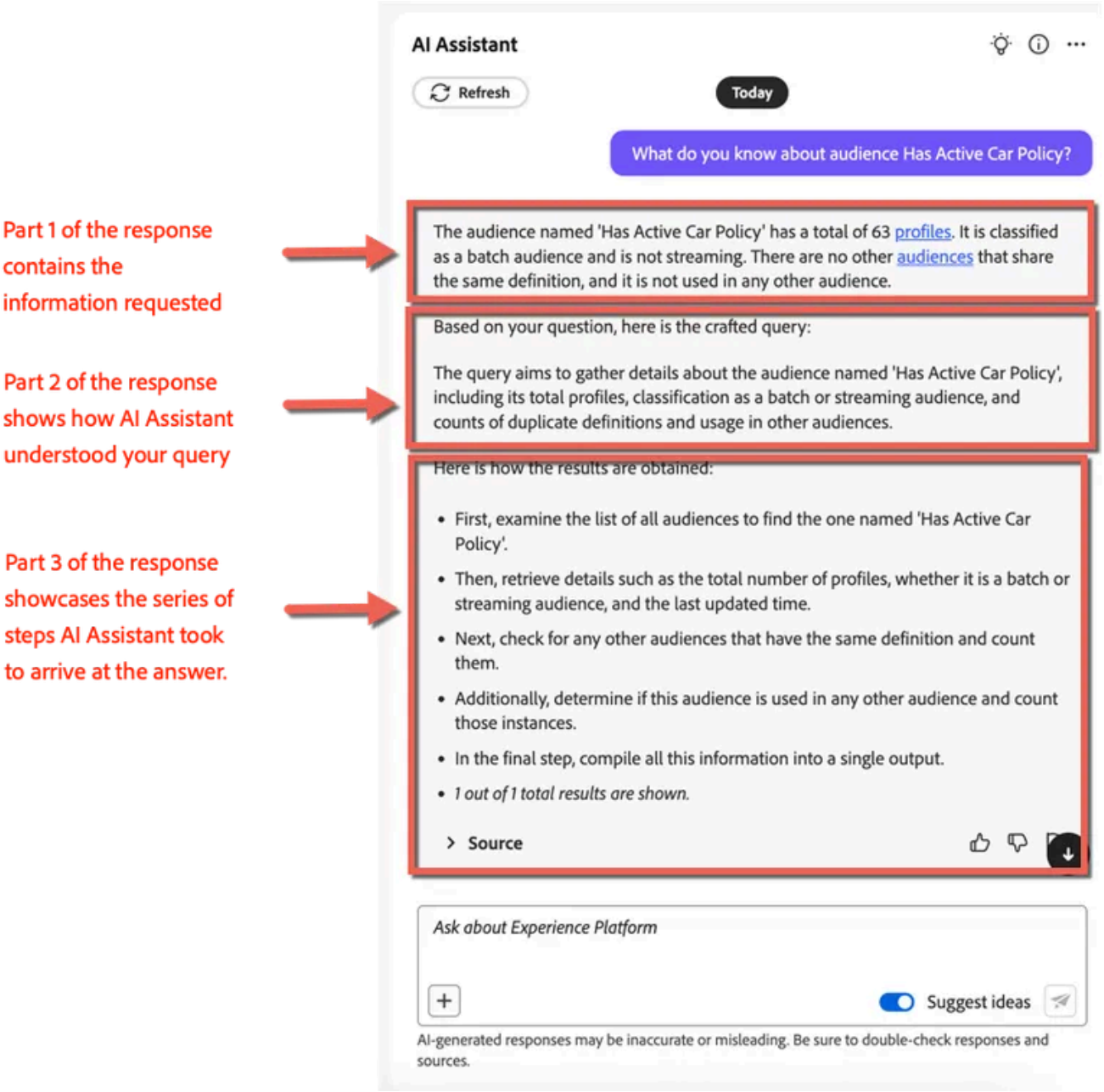
Start typing **Has** and you'll see the objects list update as you type. Select **Has Active Car Policy** audience from the drop down.



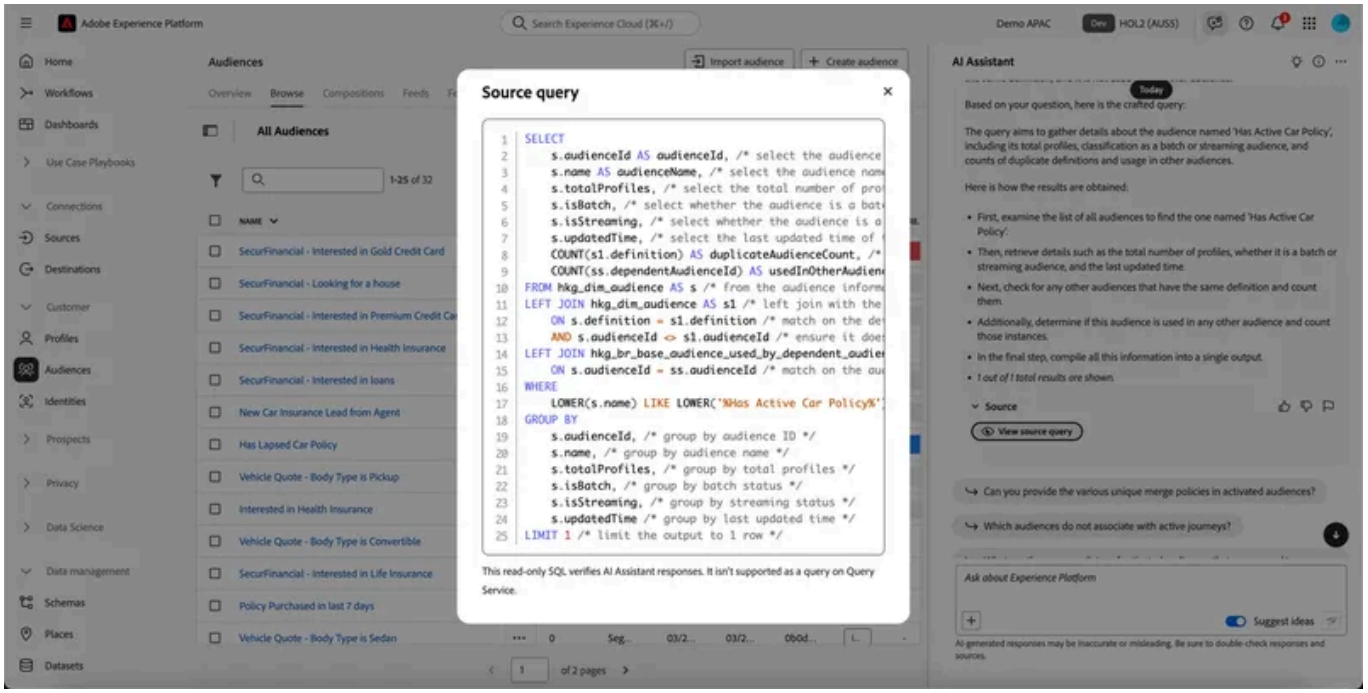
Once AI Assistant provides a response, take note of the structured output, which consists of three key sections:

- Actual response and data – The primary insights retrieved from Adobe Experience Platform.

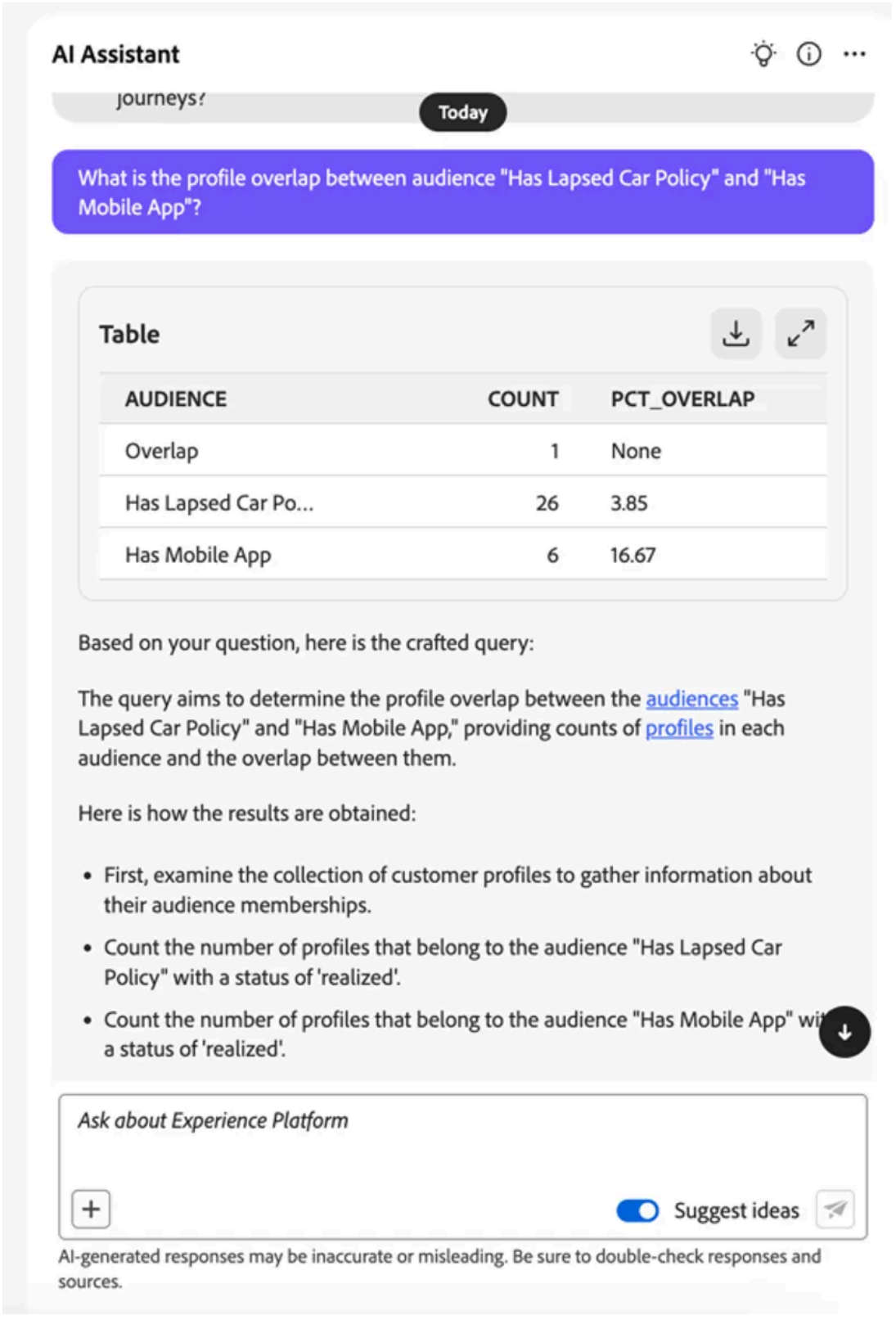
- How AI Assistant interpreted your question – Explanation of AI Assistant's reasoning.
- How the answer was derived – The logic and steps behind the response.



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.

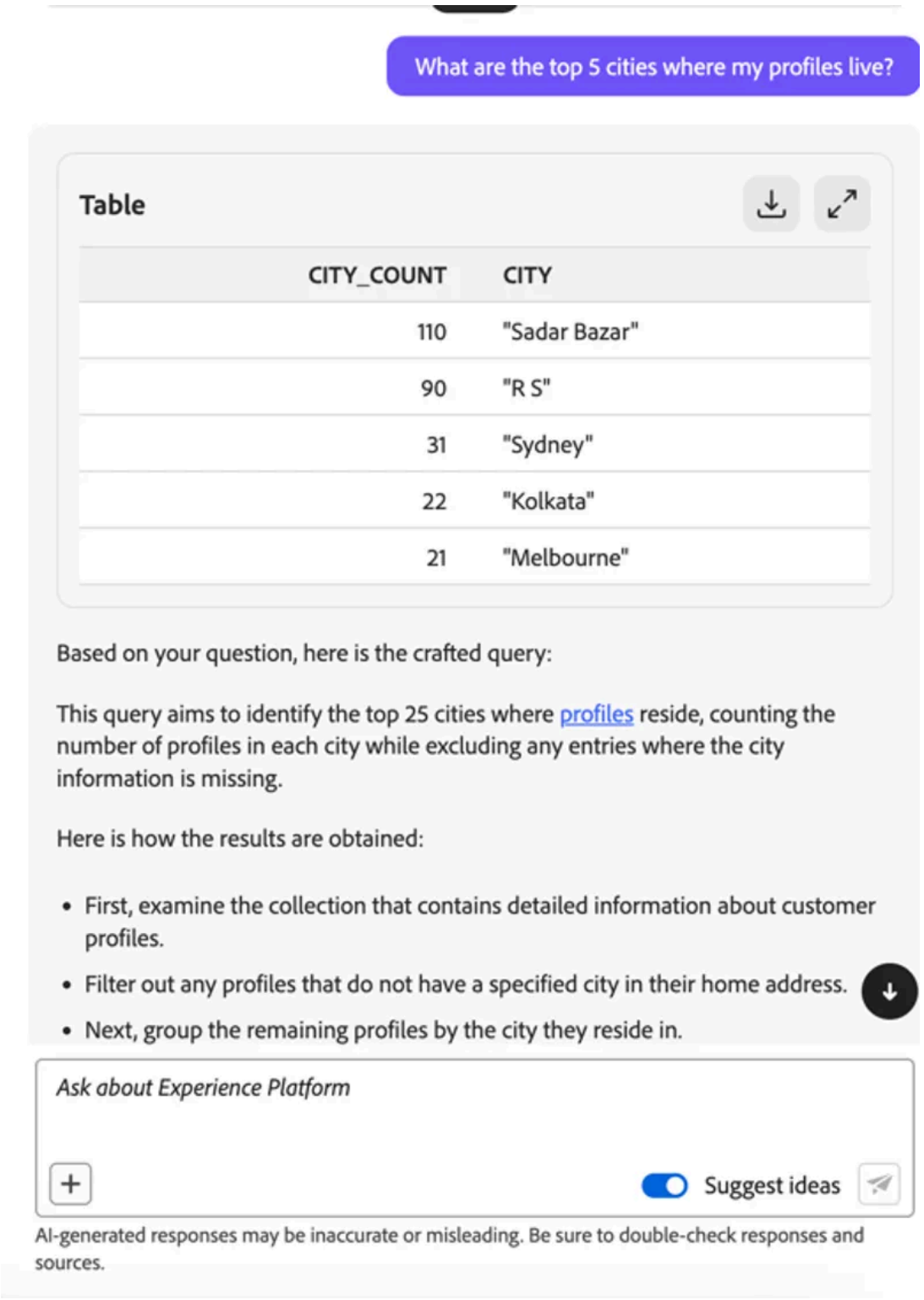


We can use AI Assistant to understand the overlap between audiences. Ask AI Assistant: **What is the profile overlap between audience "Has Lapsed Car Policy" and "Has Mobile App"?**

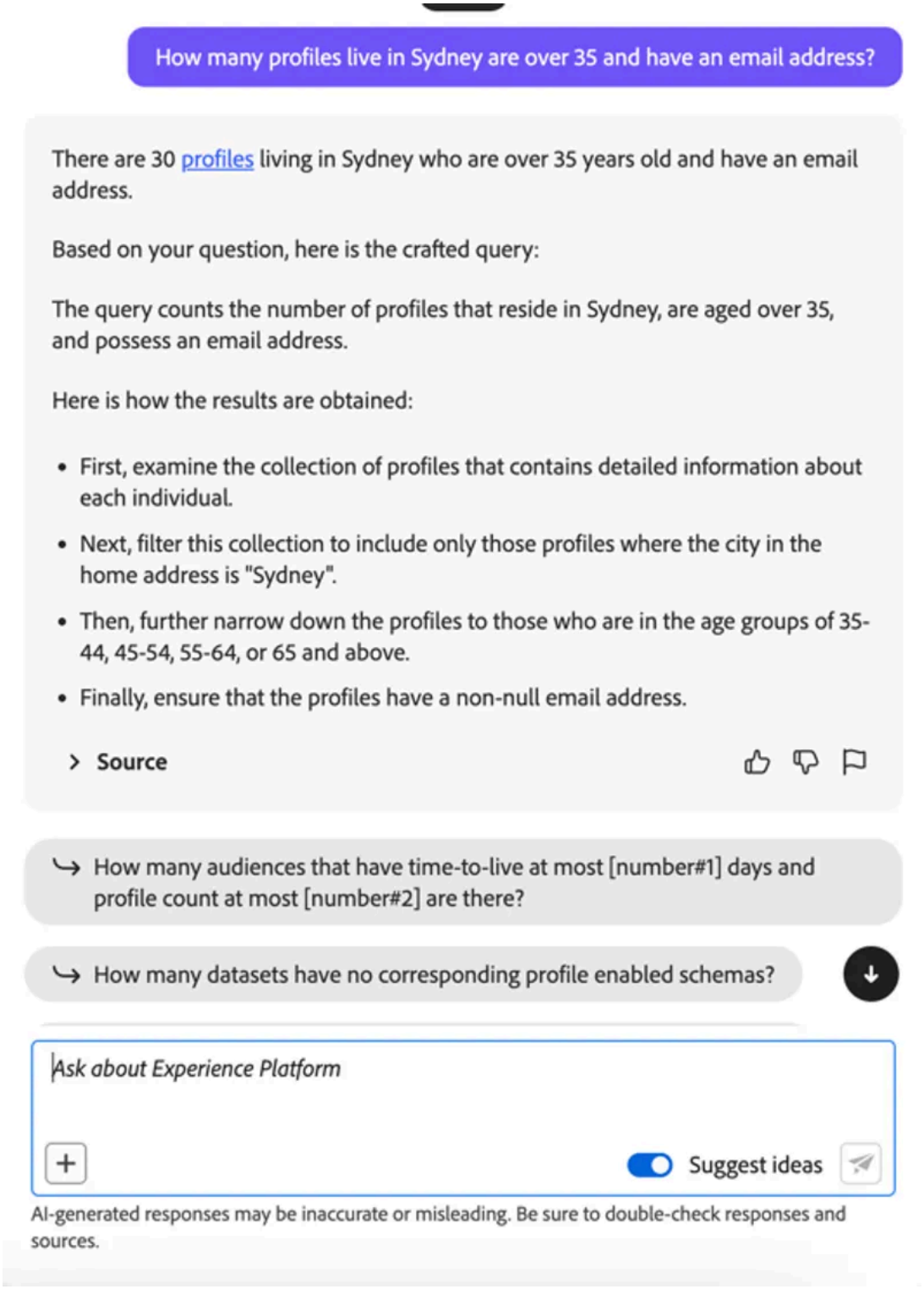


Here's how to interpret these values. 3.85% of Has Lapsed Car Policy audience has an overlap with 16.67% of Has Mobile App. The total number of profiles common between both of them is 1.

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?**



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



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 and 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 Assitant 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:

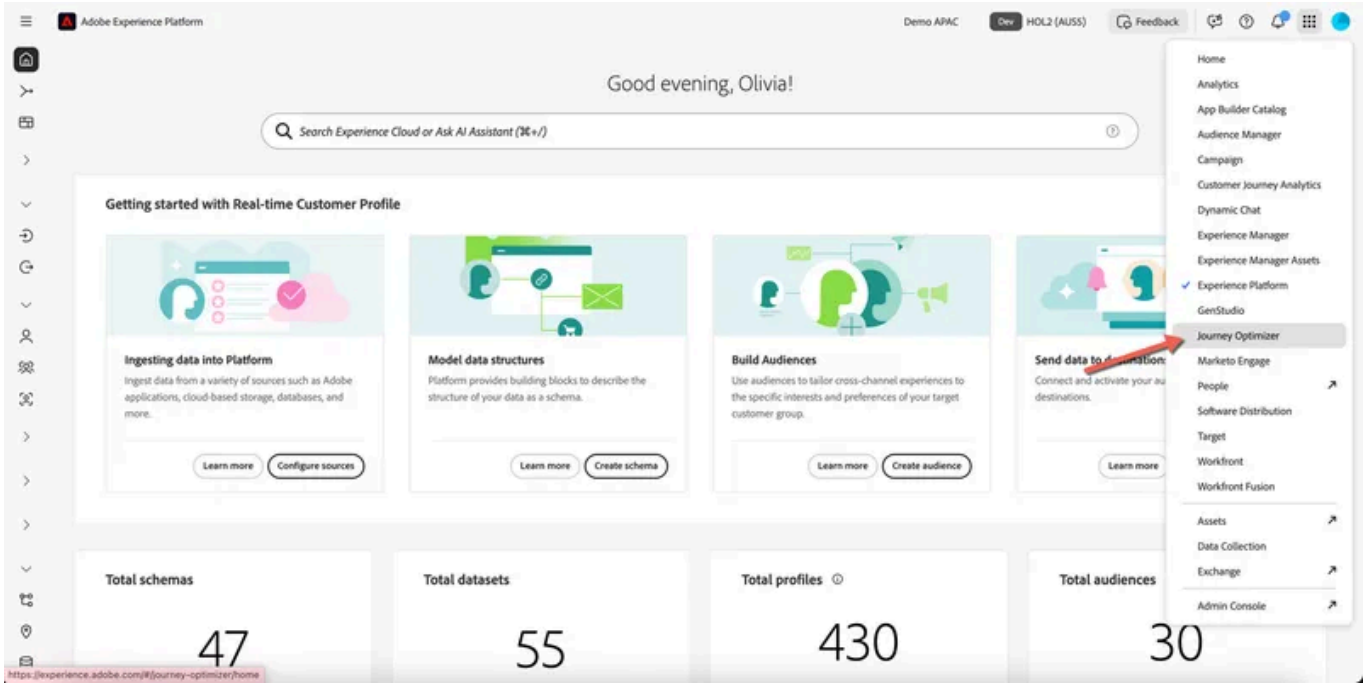
1. **Day 0:** Send personalised email with multiple variants
2. **Day 2:** If no engagement, send an SMS or Push notification to re-engage.
3. **Exit:** If customer completes the process at any time

Access

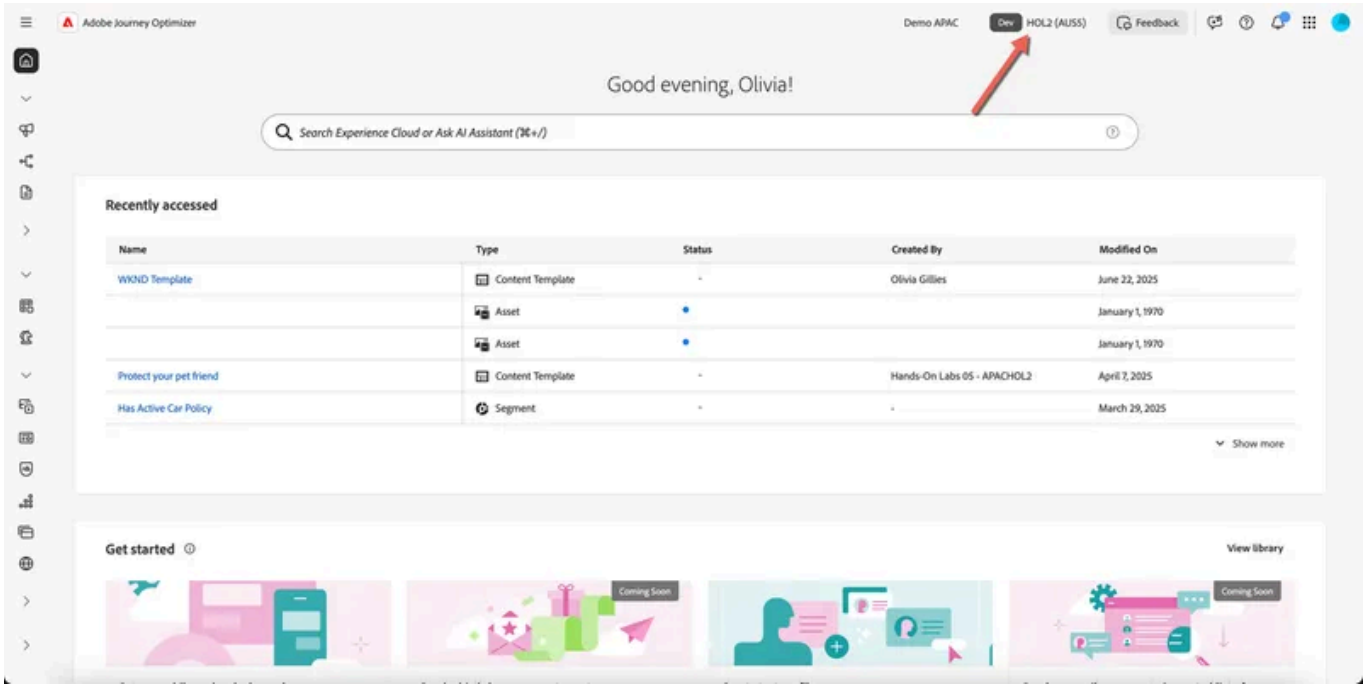
Your login credentials should be available on your desk including your lab participant number.

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.

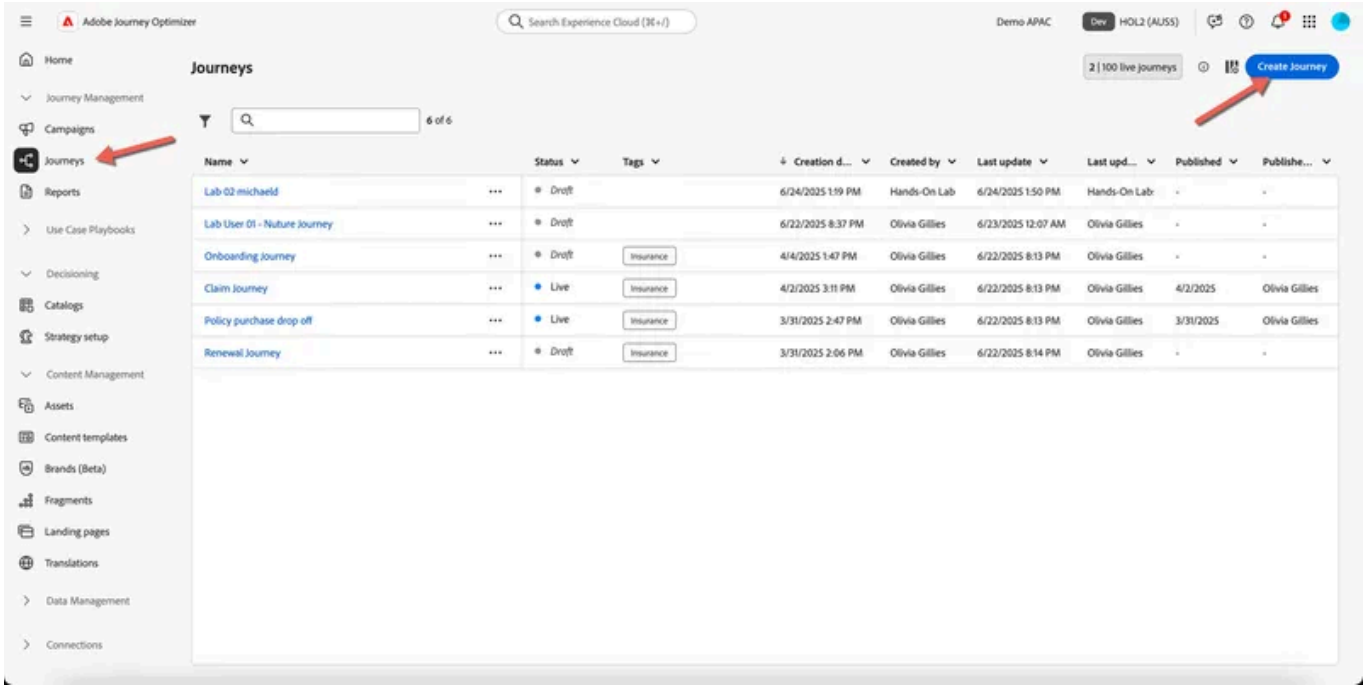
Content Management is where you'll manage all of your content, including your Asset Repository powered by Adobe Experience Manager **Assets**, re-usable multi-channel **Content Templates**, HTML and Expression **Fragments, Landing pages** and **Translations** for multi-lingual support. You'll also find 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.

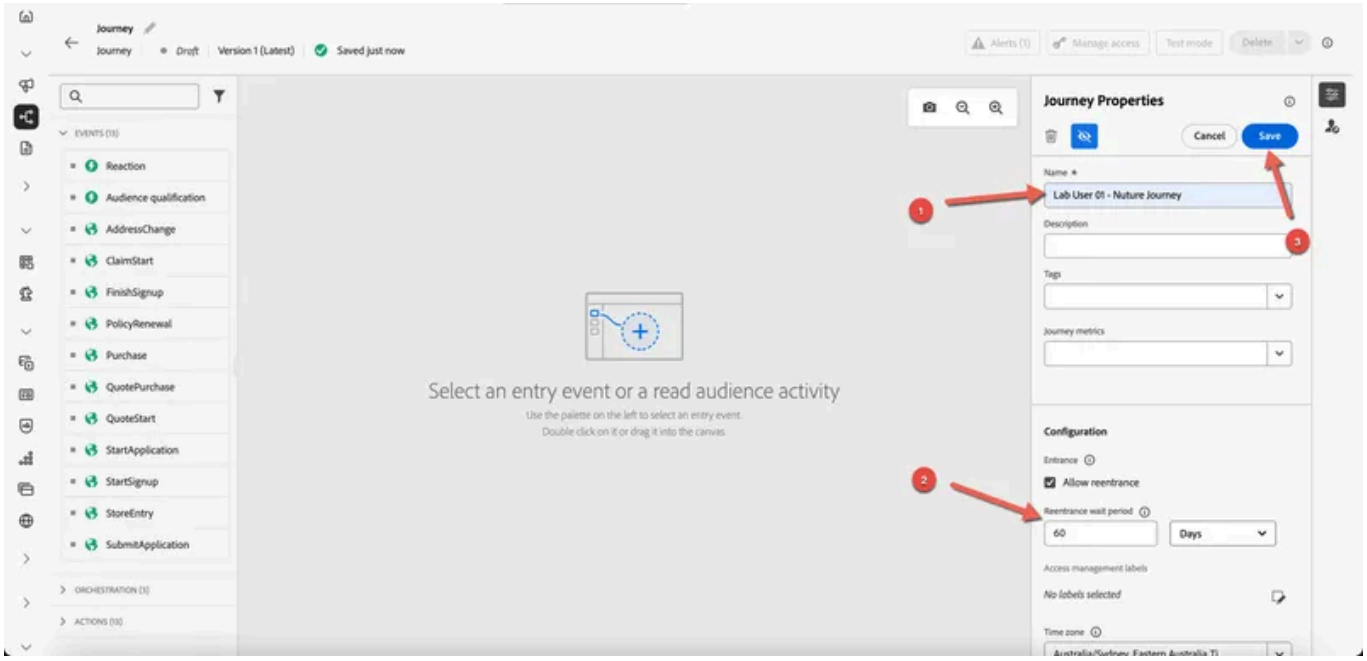
Administration is where you will find configuration items for journey triggers, custom actions, channels and business rules to control channel based frequency capping.

2.2 Create Journey

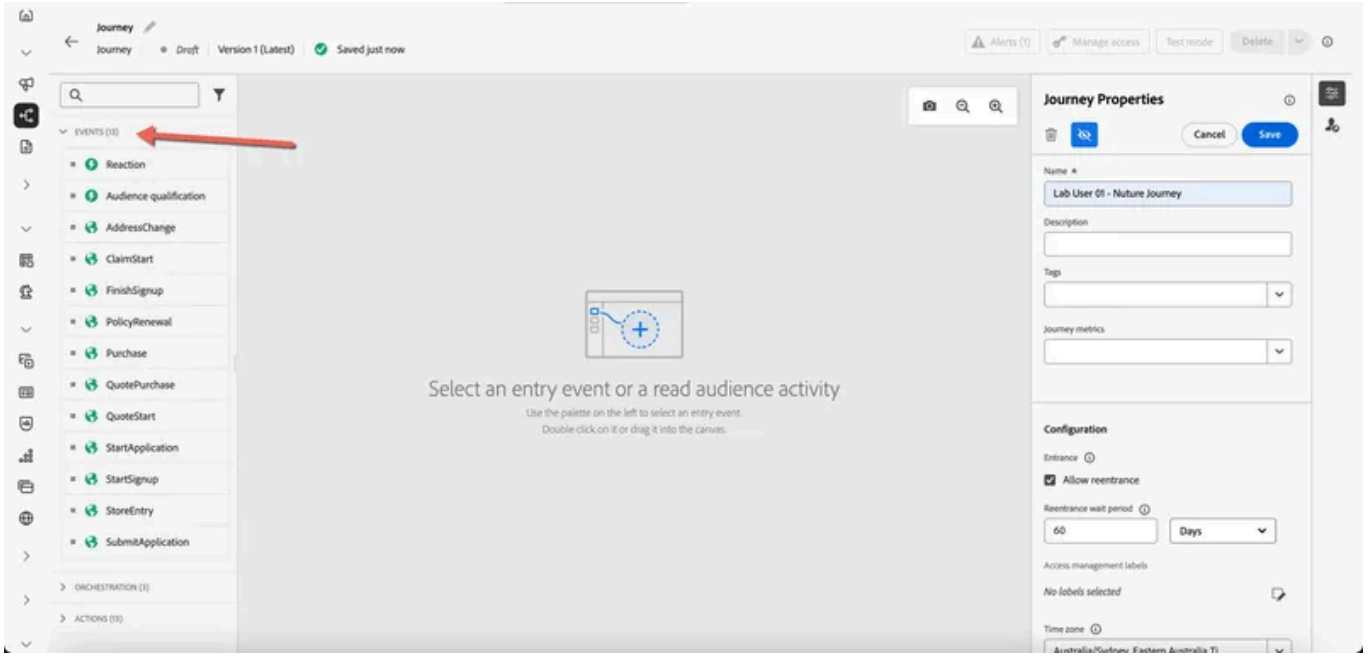
Navigate to **Journey Management → Journeys** and click on **Create Journey.**



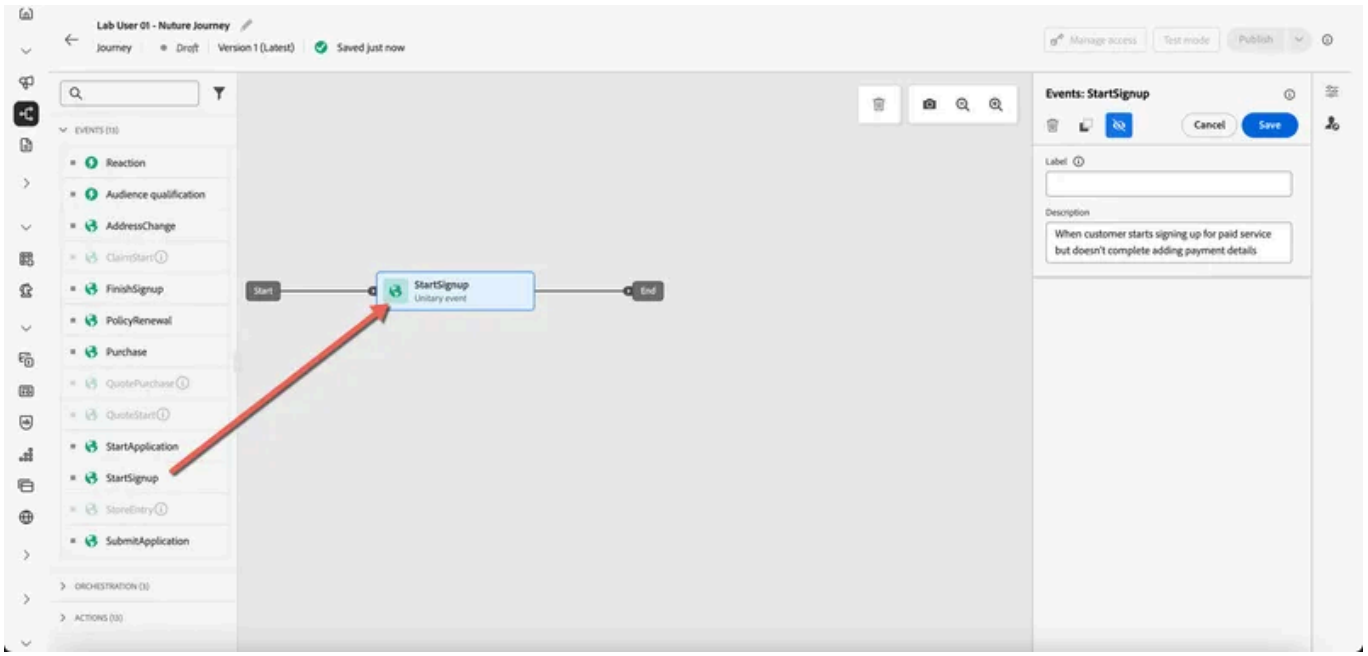
Give your journey a **name**, add your lab user number or name so you can recognise it from other lab participants. The journey properties are also where you can set up the re-entrance criteria, set re-entry wait period to every **60 days**. Click **Save**.



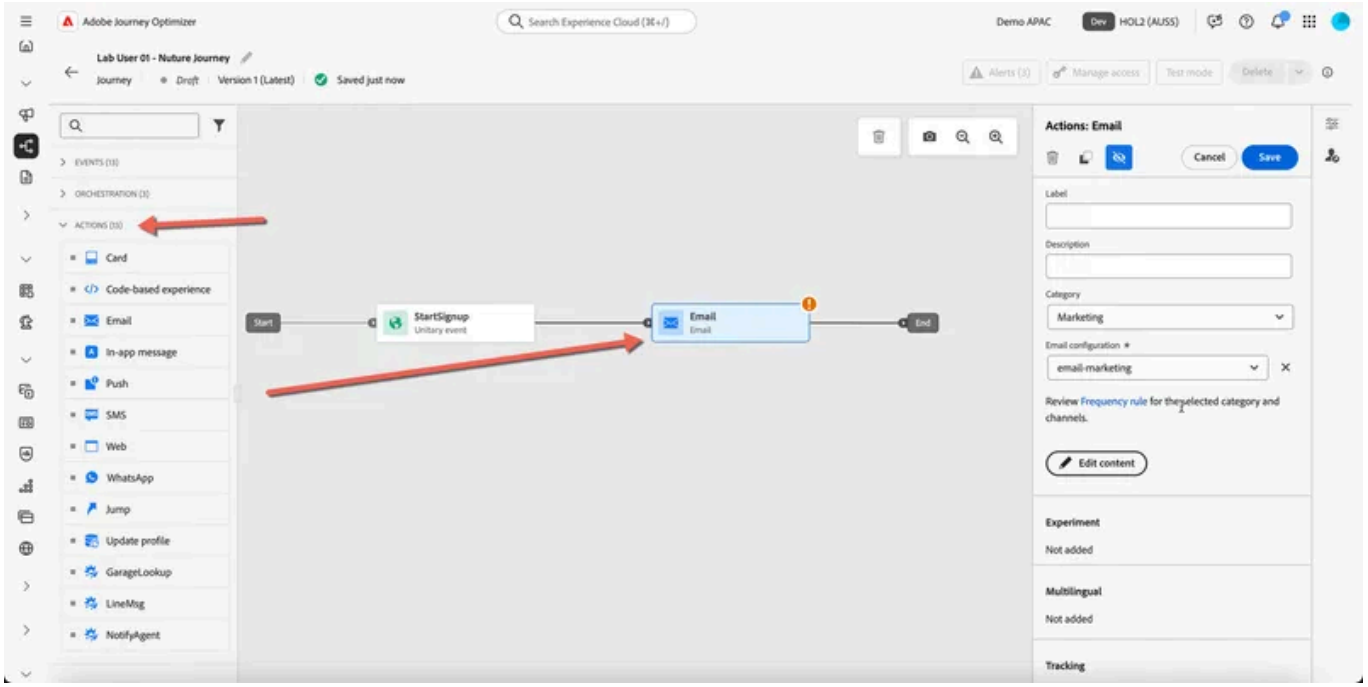
Journeys can be triggered from individual events or when a customer enters or exits a segment. You can see the events that are configured as journey triggers in the left panel - this list is configurable and will depend on your implementation.



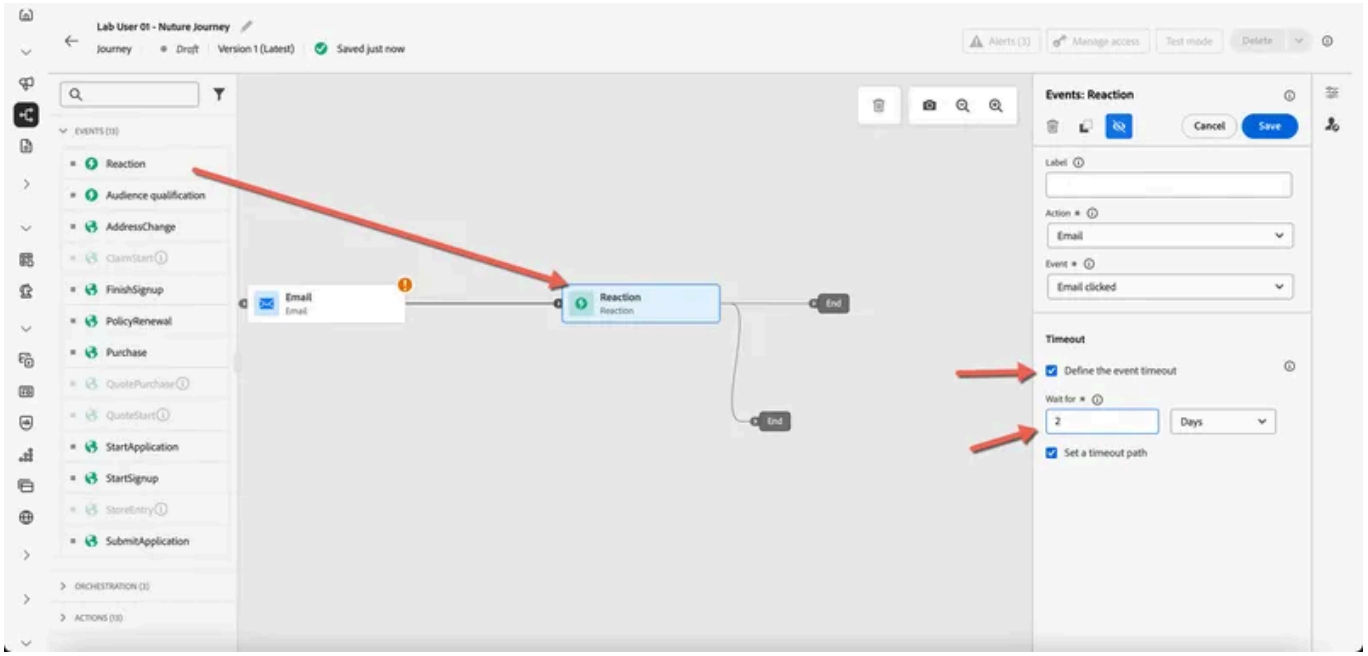
Drag the **StartSignup** event into the panel as our journey trigger.



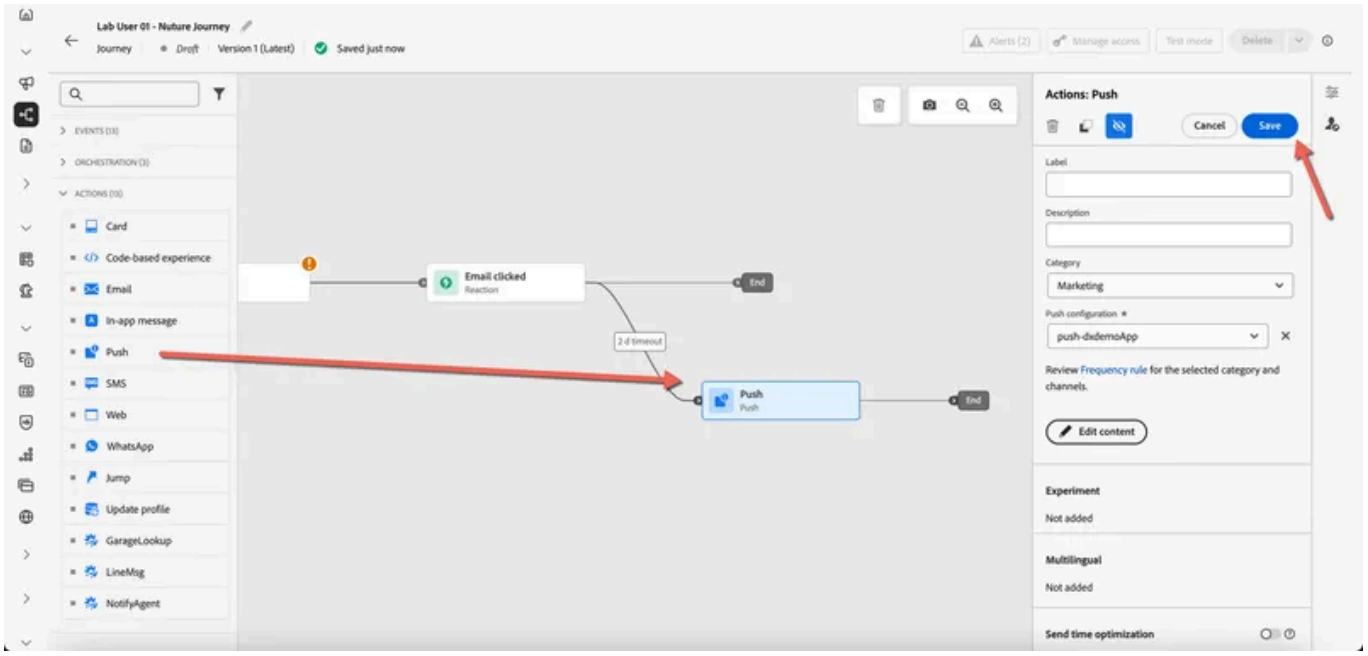
The **Actions** panel is where you'll find the native messaging channels as well as any custom channels or actions that have been enabled in the sandbox. Drag an **Email** action onto the canvas and attach it to the trigger event.



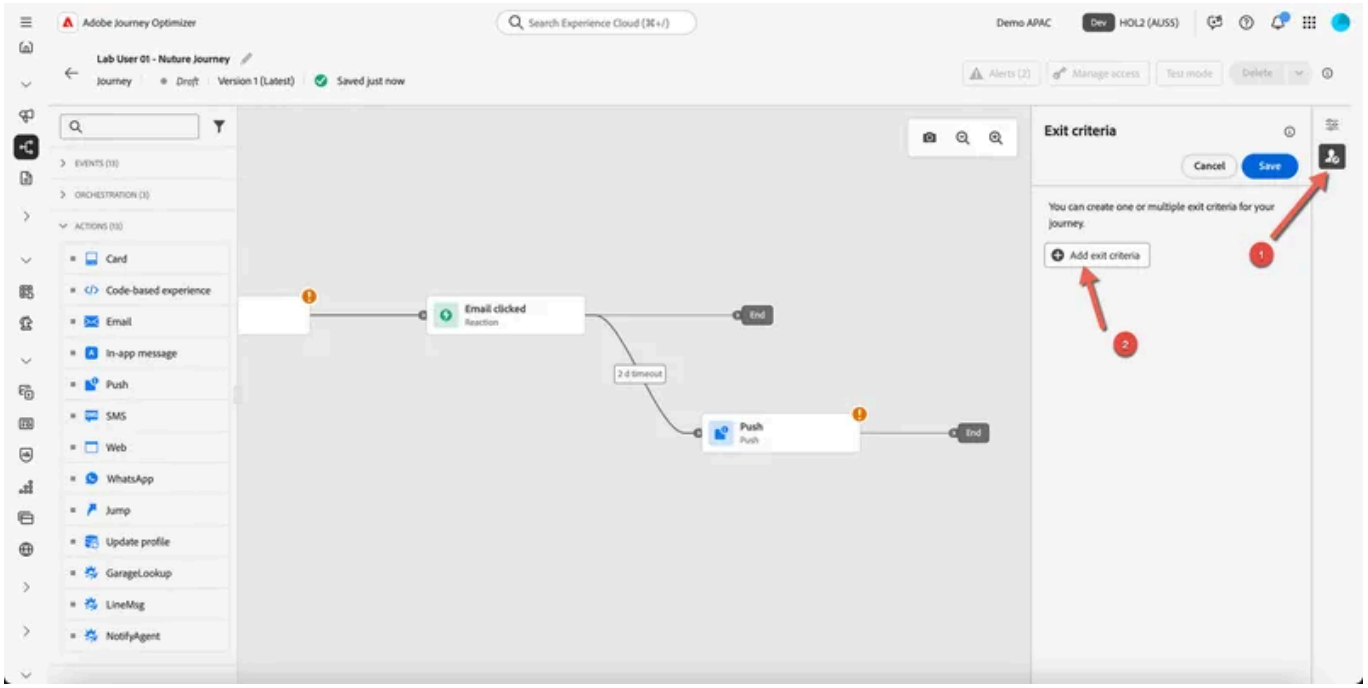
Before we configure the email content we'll finish the journey flow. Returning to the events panel, drag a **Reaction** activity after the email and configure a **Timeout** of 2 days. This triggers the journey to continue after 2 days along the timeout path if the customer does not click the link in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



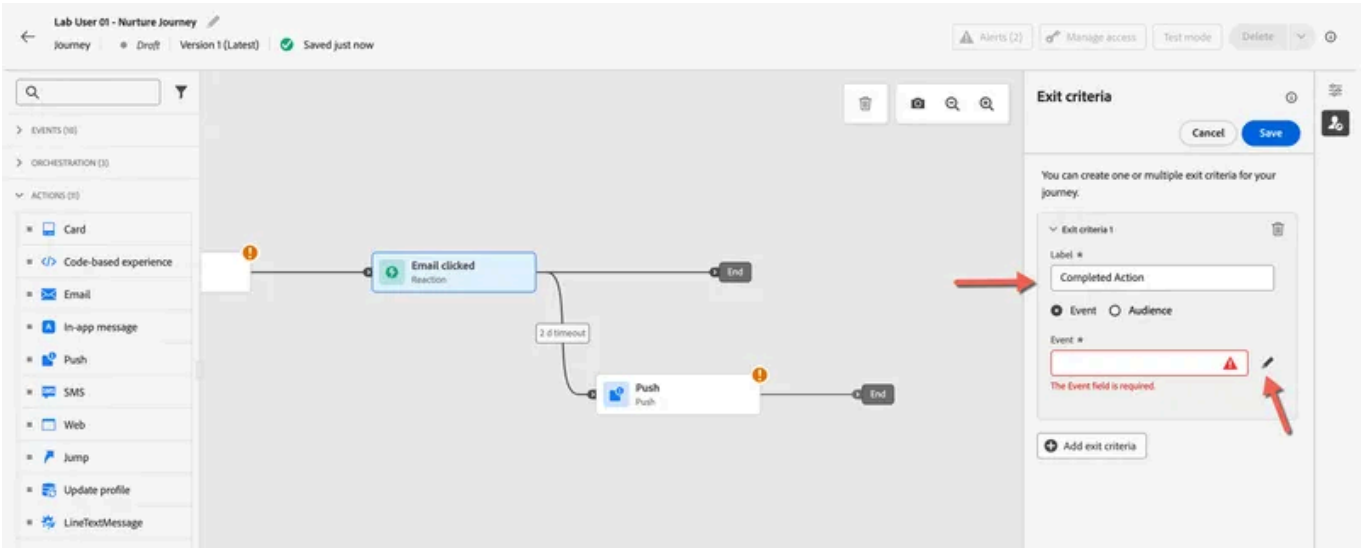
Next drag a **Push** action onto the timeout path and click **Save**



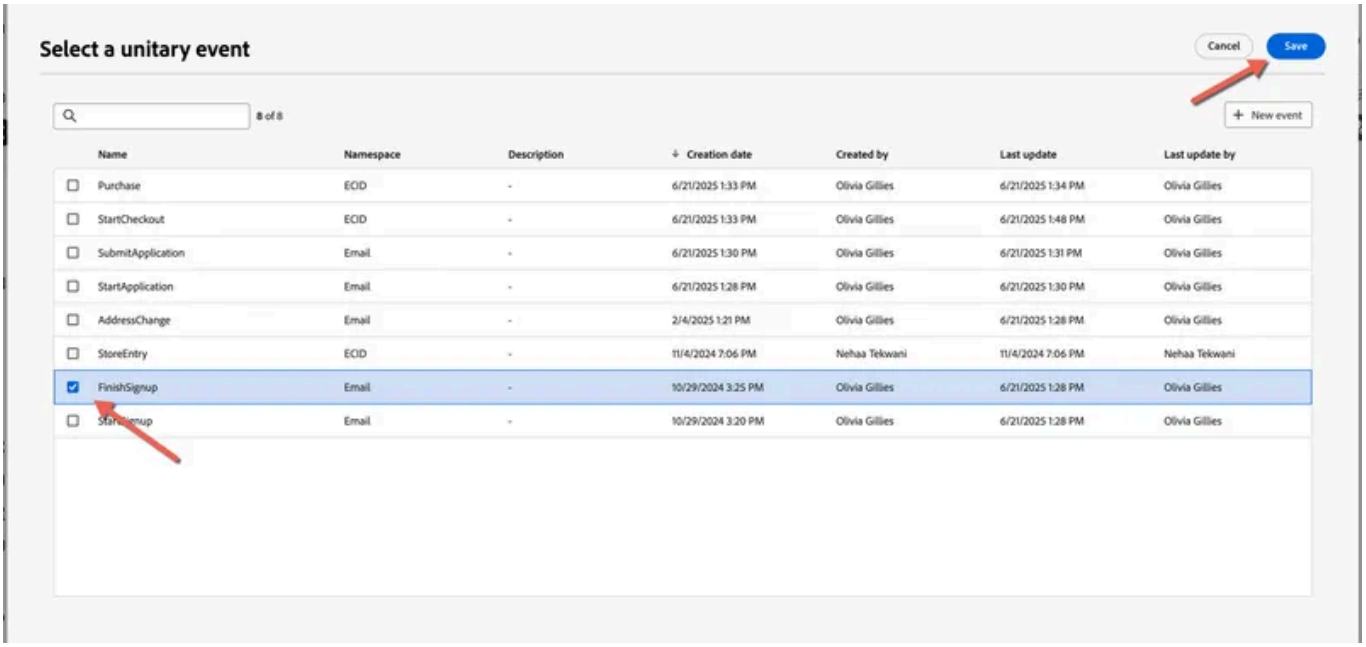
Lastly, we'll add exit criteria to remove profiles from the journey once they complete the desired action, in this case completing their subscription. Click on the profile icon to the right of the journey to open the exit criteria panel. Click the button to add the **exit criteria**.



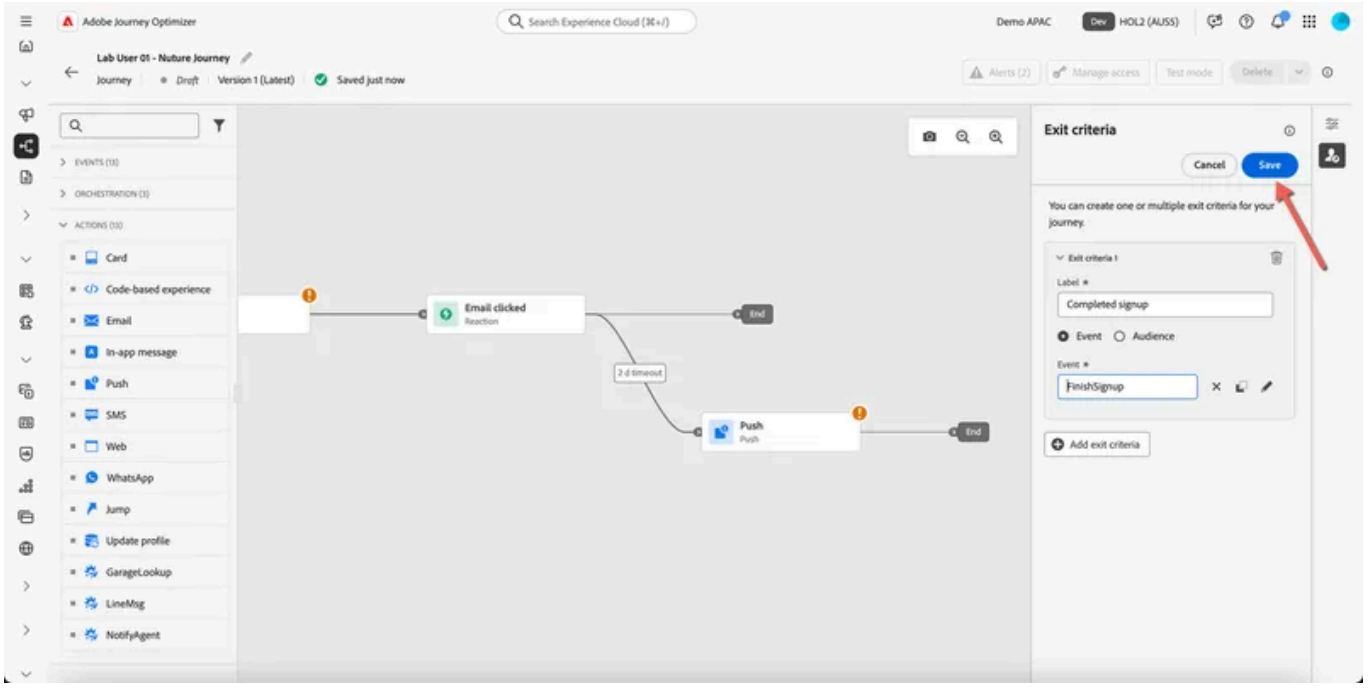
You can use events or audiences as exit criteria, for this example we'll use an event. Click the icon to select an event.



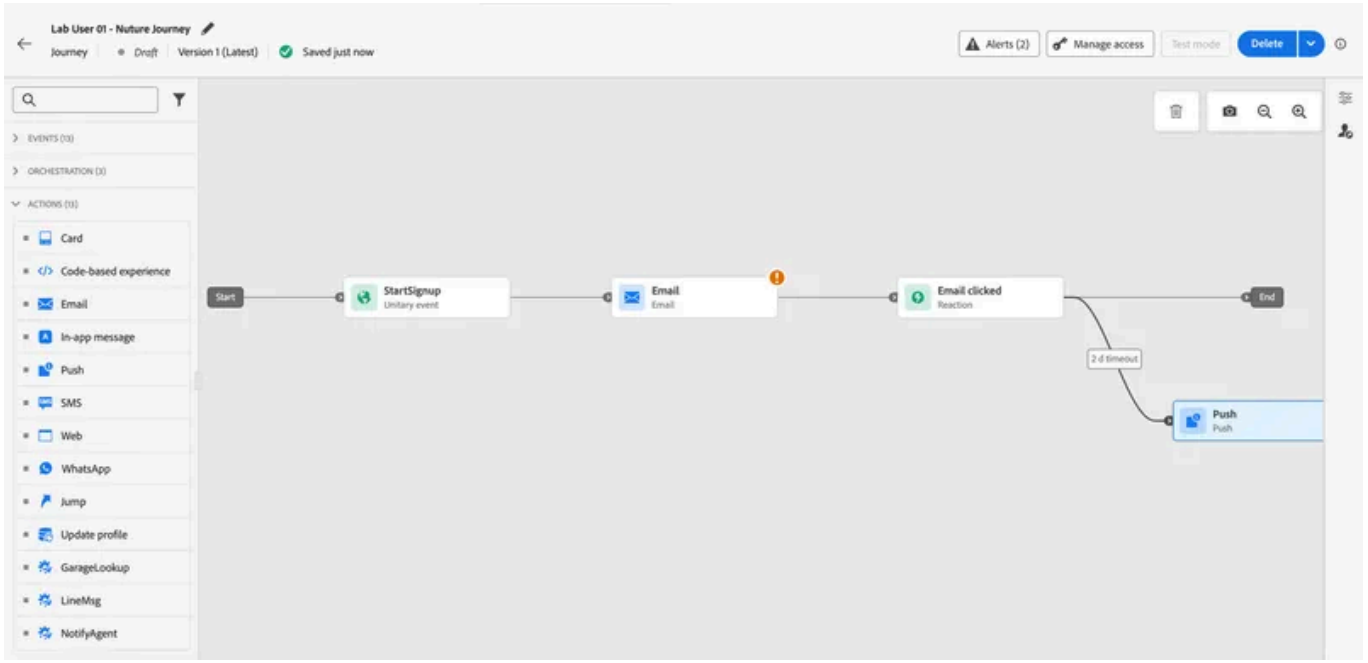
Select the **FinishSignup** event and click **Save.**



Click to **Save** the criteria.



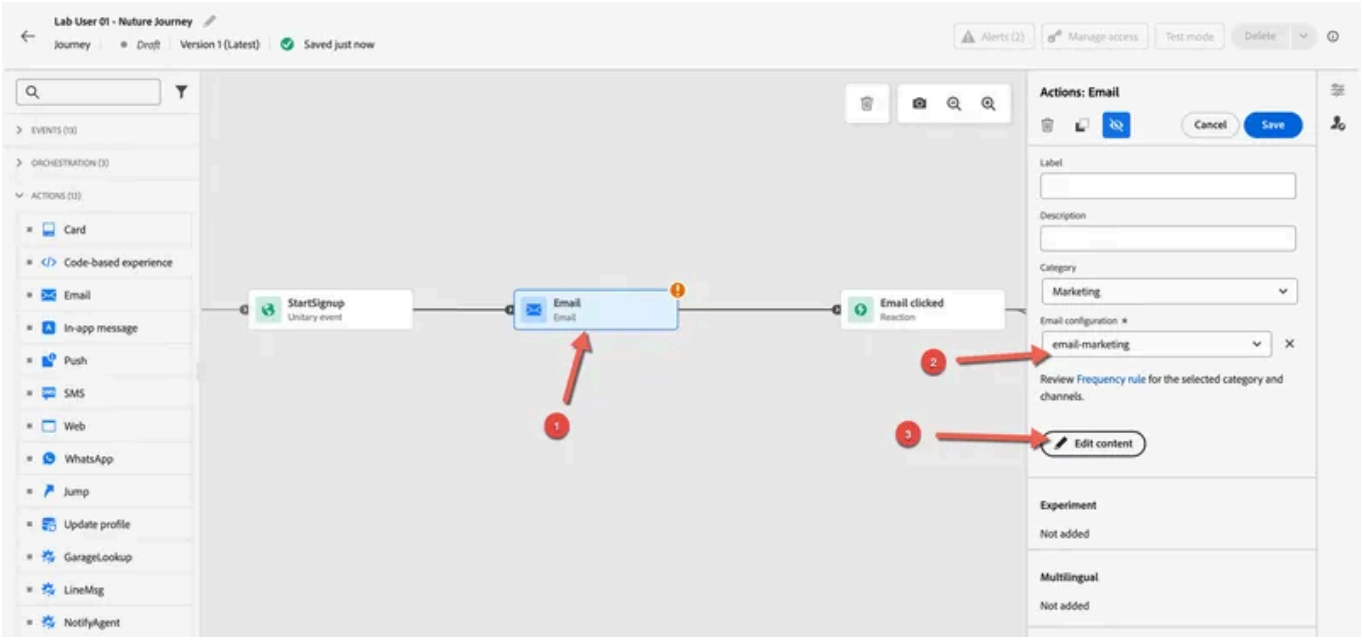
Your journey should look like this.



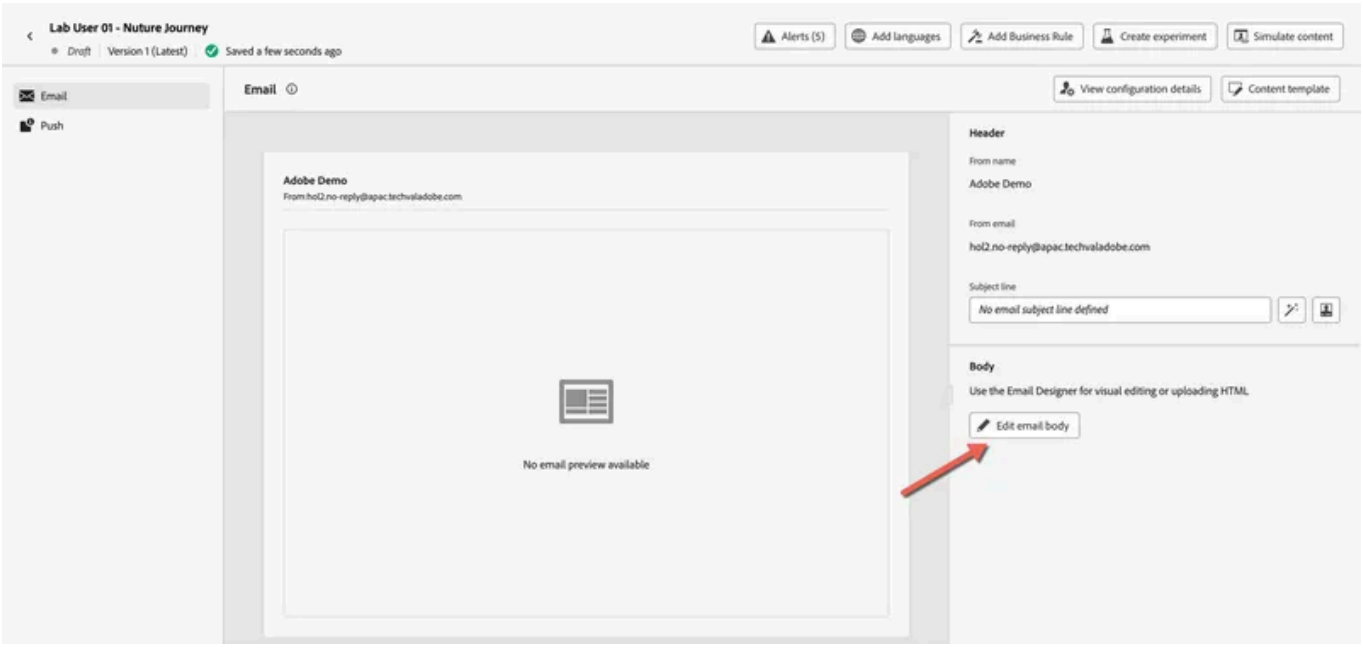
Next we'll add content to our messages.

2.3 Add Email Content

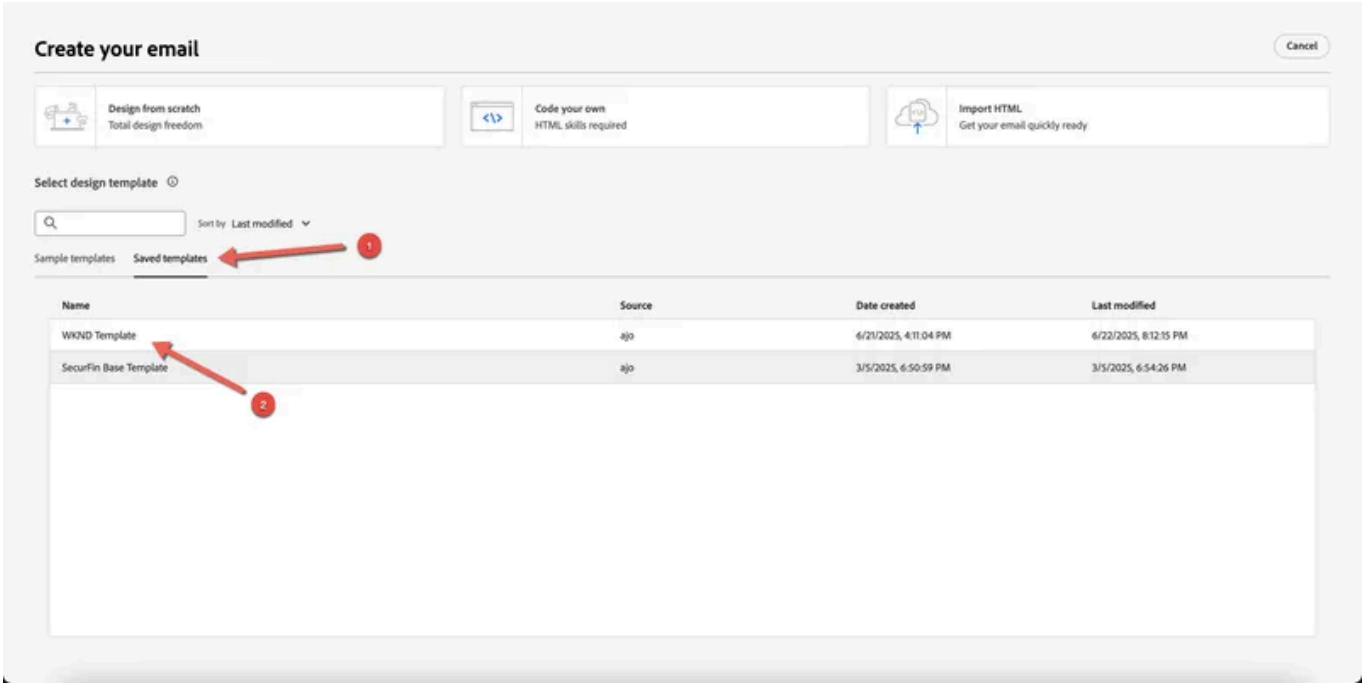
Click on the email activity in your journey, set the **Email Configuration** to 'email-marketing' and click to **Edit Content.**



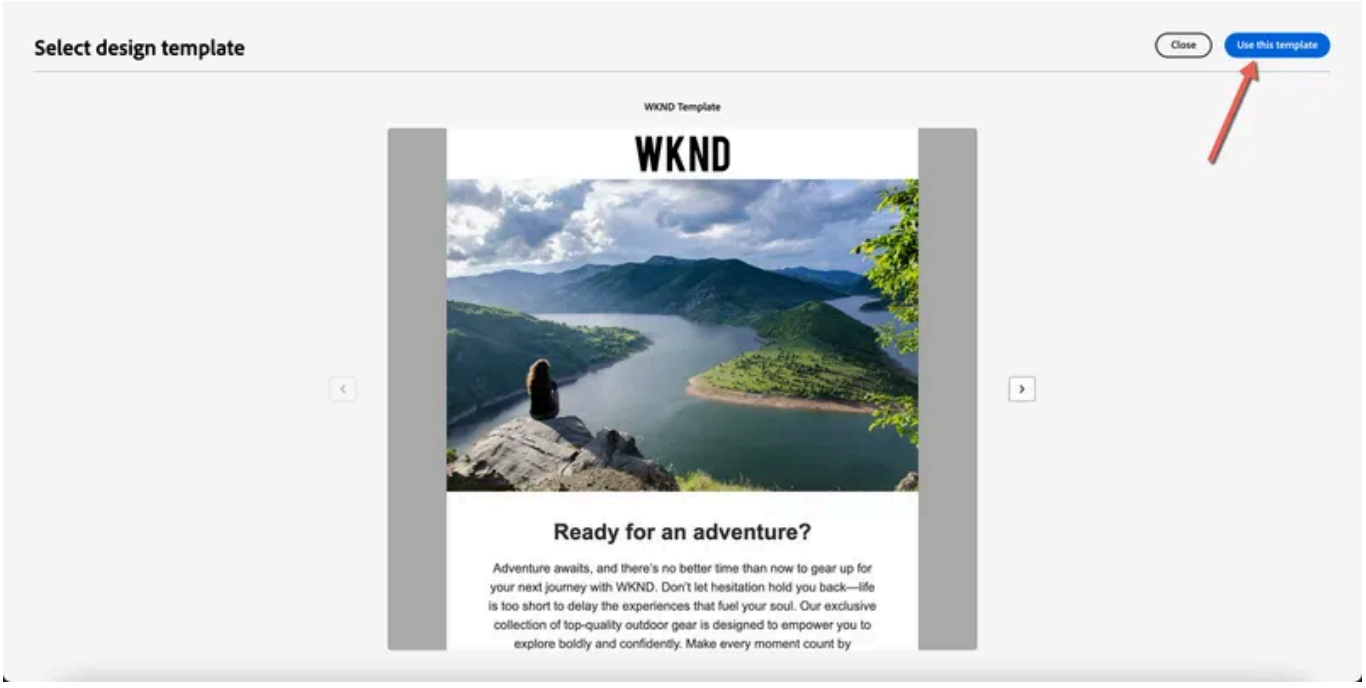
Click to **Edit email body**



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**.



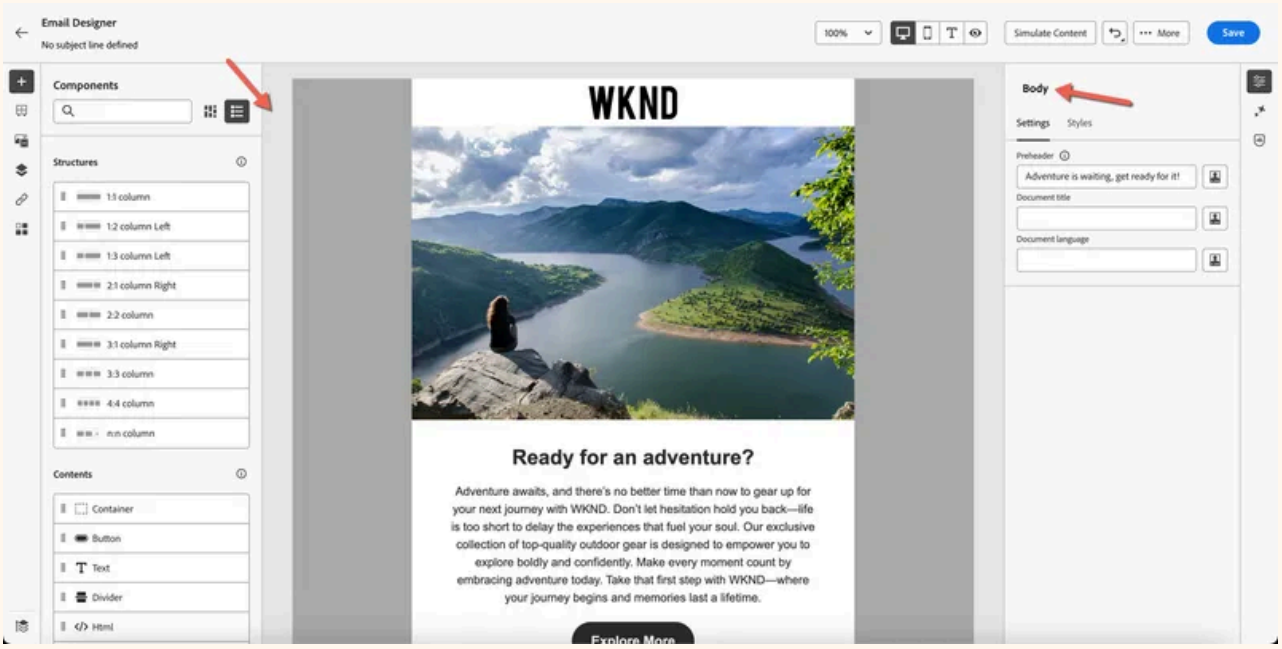
Click to **Use this Template**

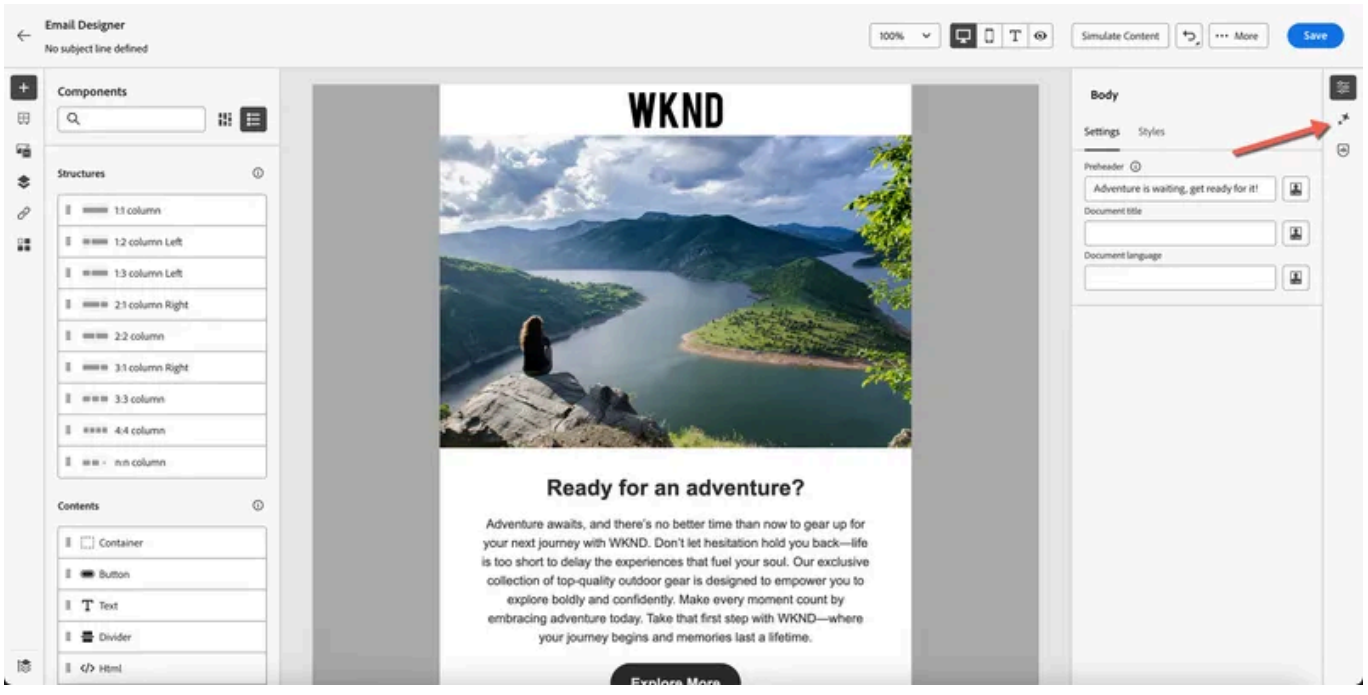


2.4 AI Assistant and Brand alignment

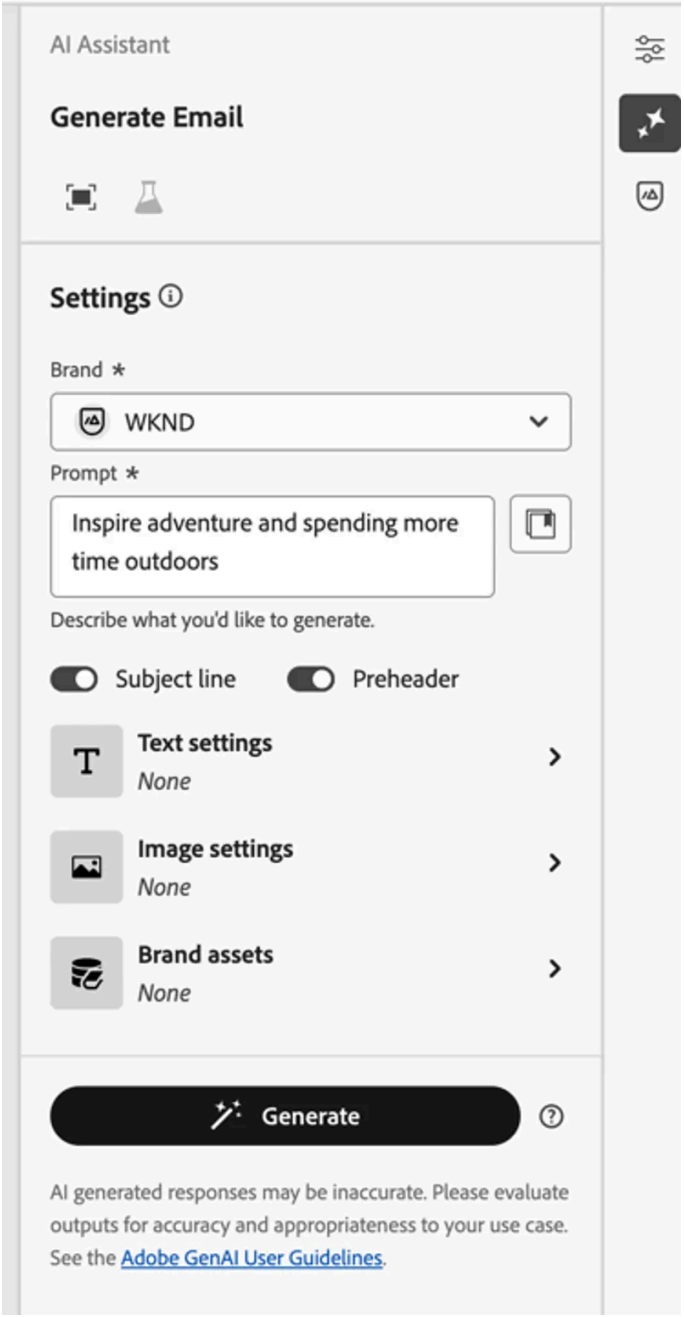
Now we'll use AI Assistant to help us generate variations of this content to use for AB testing. AI Assistant can be used to generate individual images or text components but in this case we're going to generate new variations of the full email. Make sure you have selected the **Body** of the email then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

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

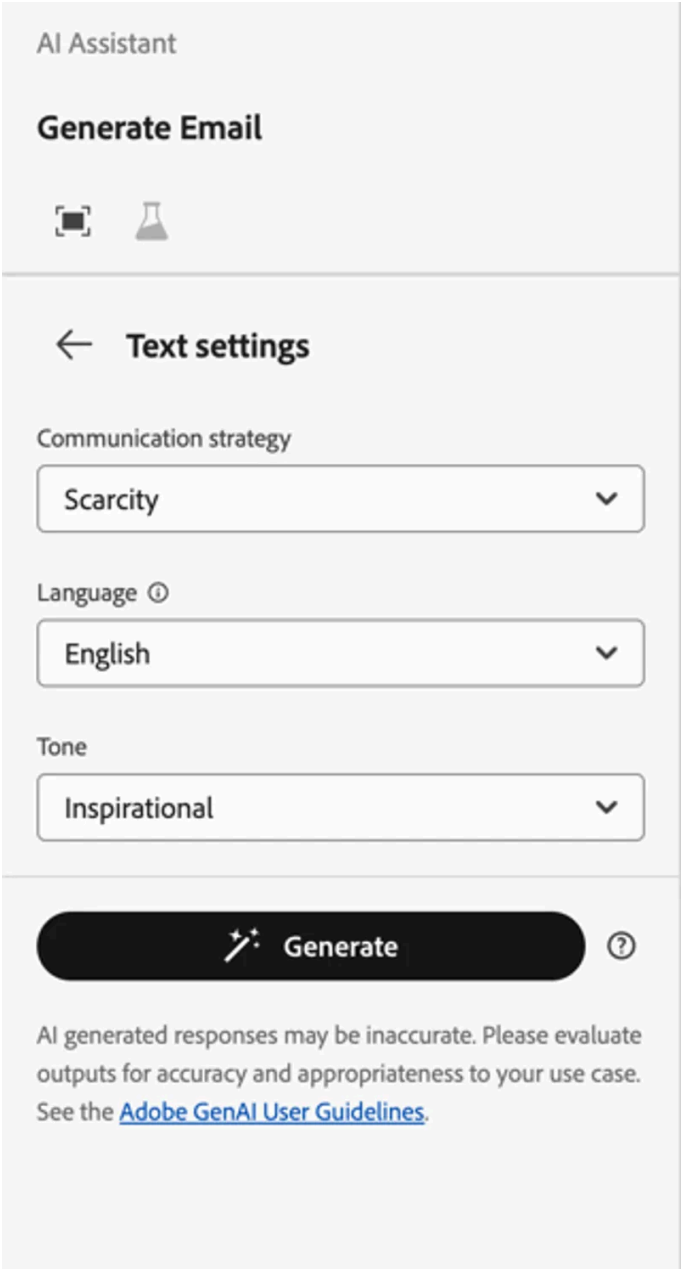




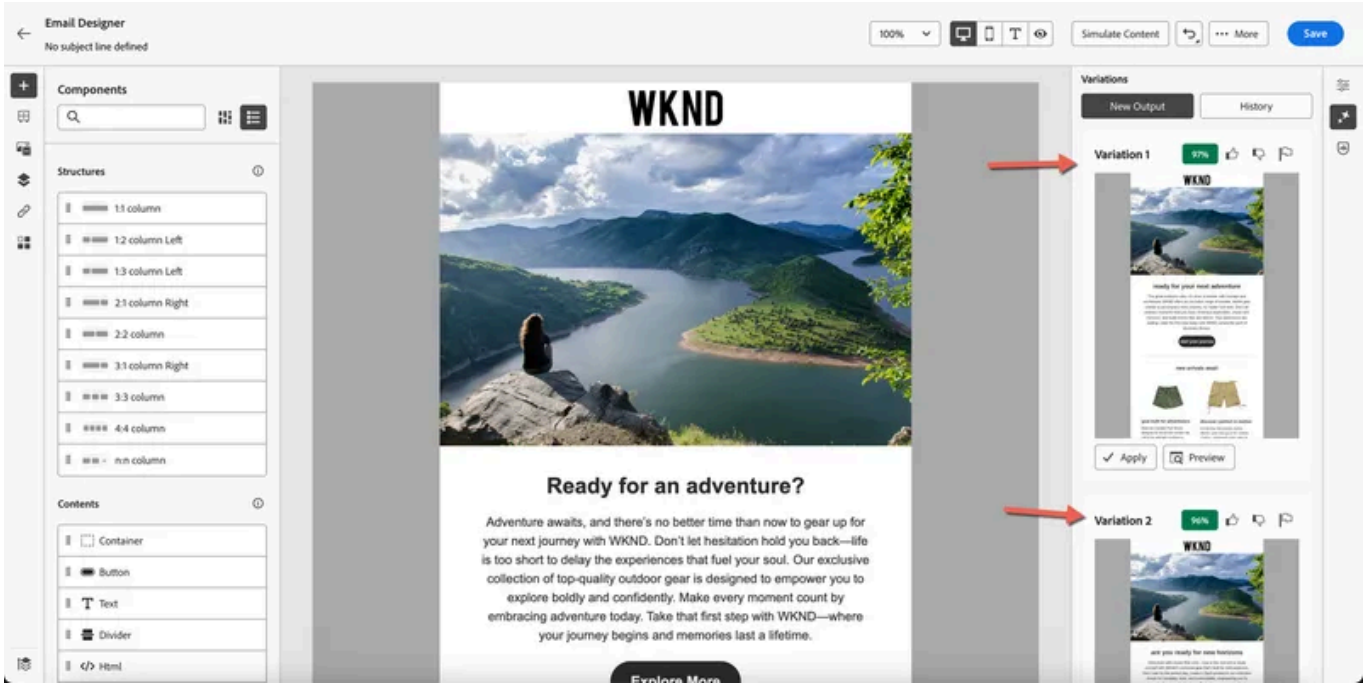
Before generating content we need to select the Brand Guidelines and provide a prompt. Select **WKND** brand and add a prompt of your choosing. Select to generate subject line and Preheader also.



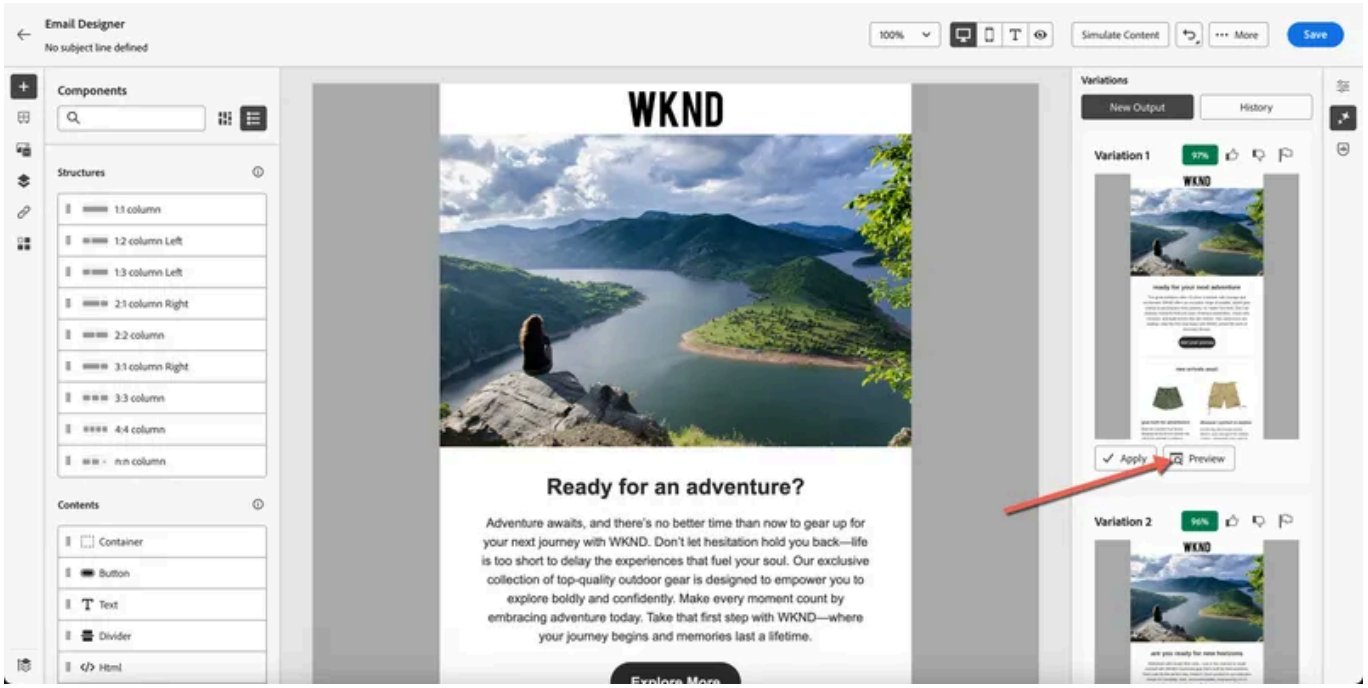
Update the **Text settings** to select the **Tone, Language** and **Communication Strategy.**



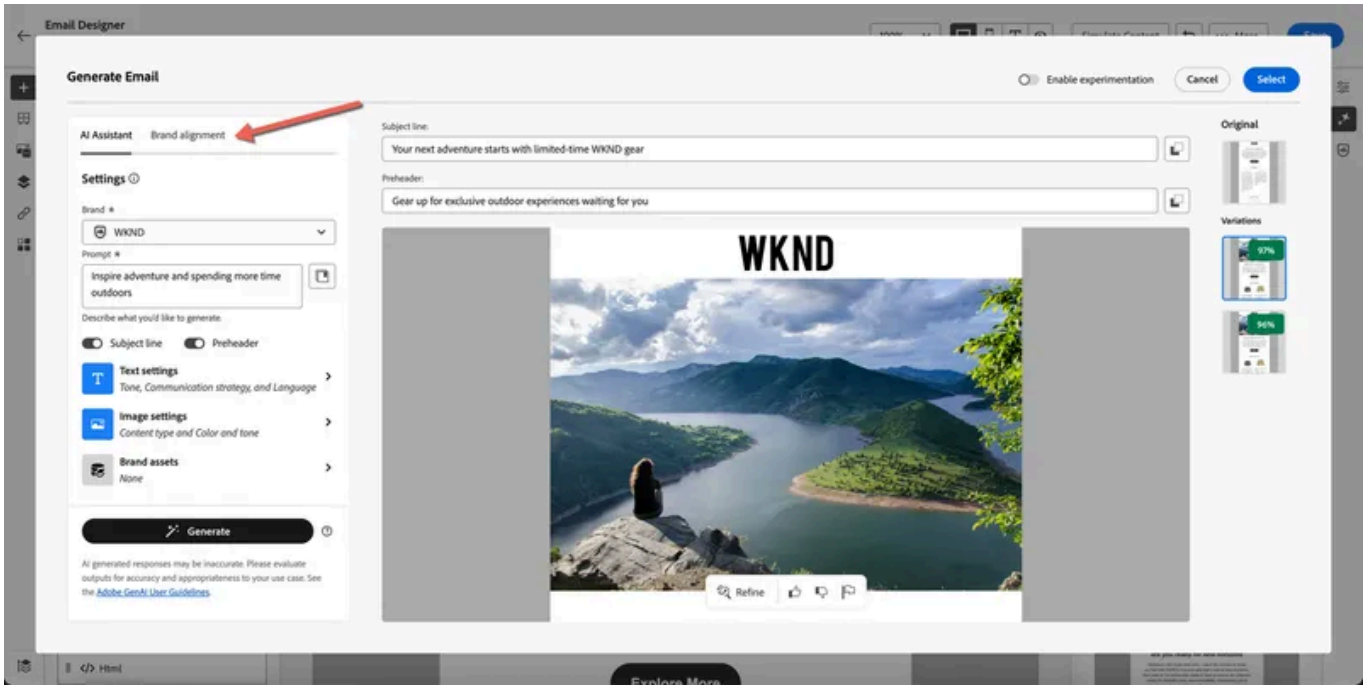
Once you're happy with the settings click to **Generate.** You will shortly see two new variations of the content generated.



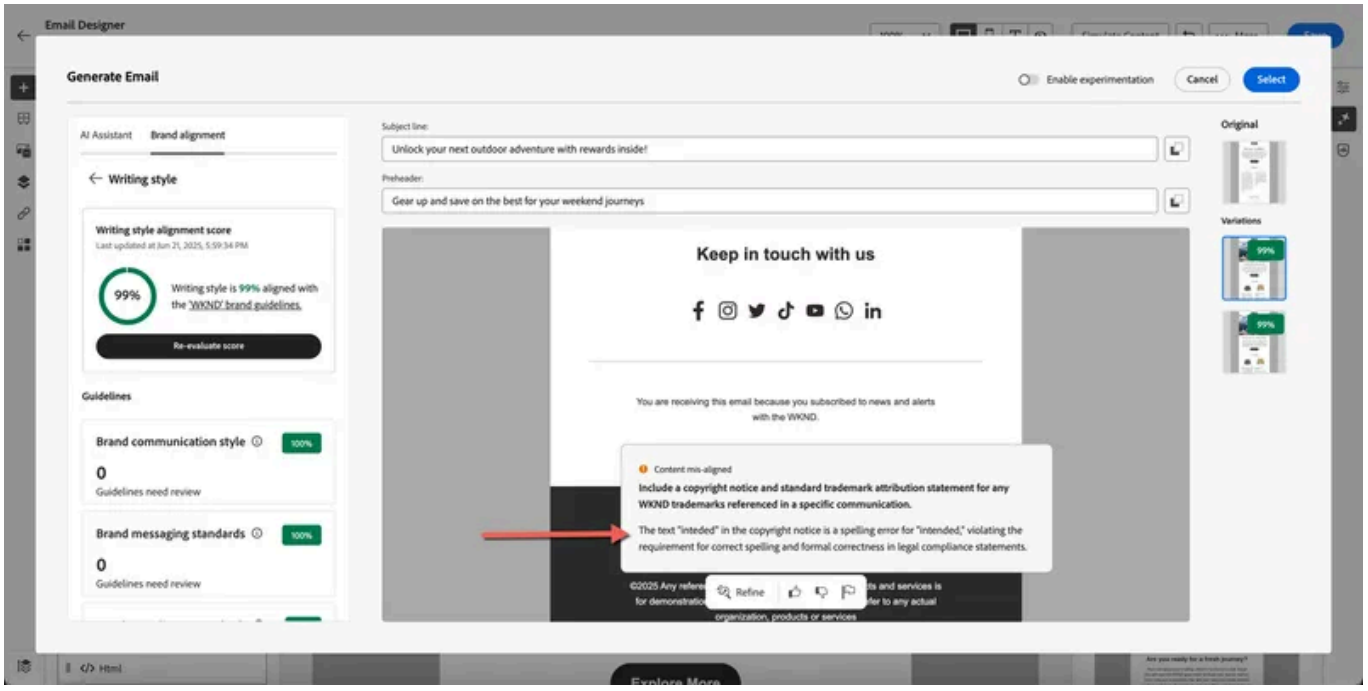
Click to **Preview** a variation.



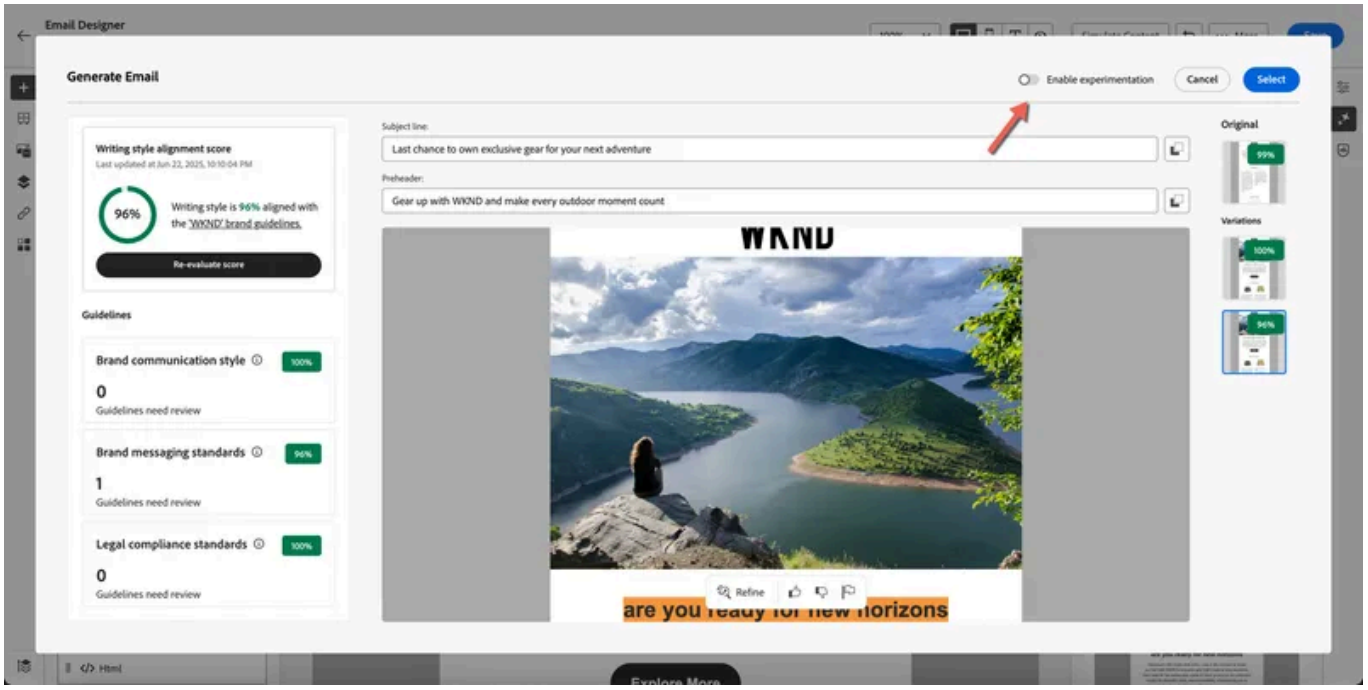
In this view you can review the content in detail, make updates to the prompt and regenerate if needed. It's also where you can review whether or not the content aligns to the Brand guidelines selected. Click on the **Brand alignment**



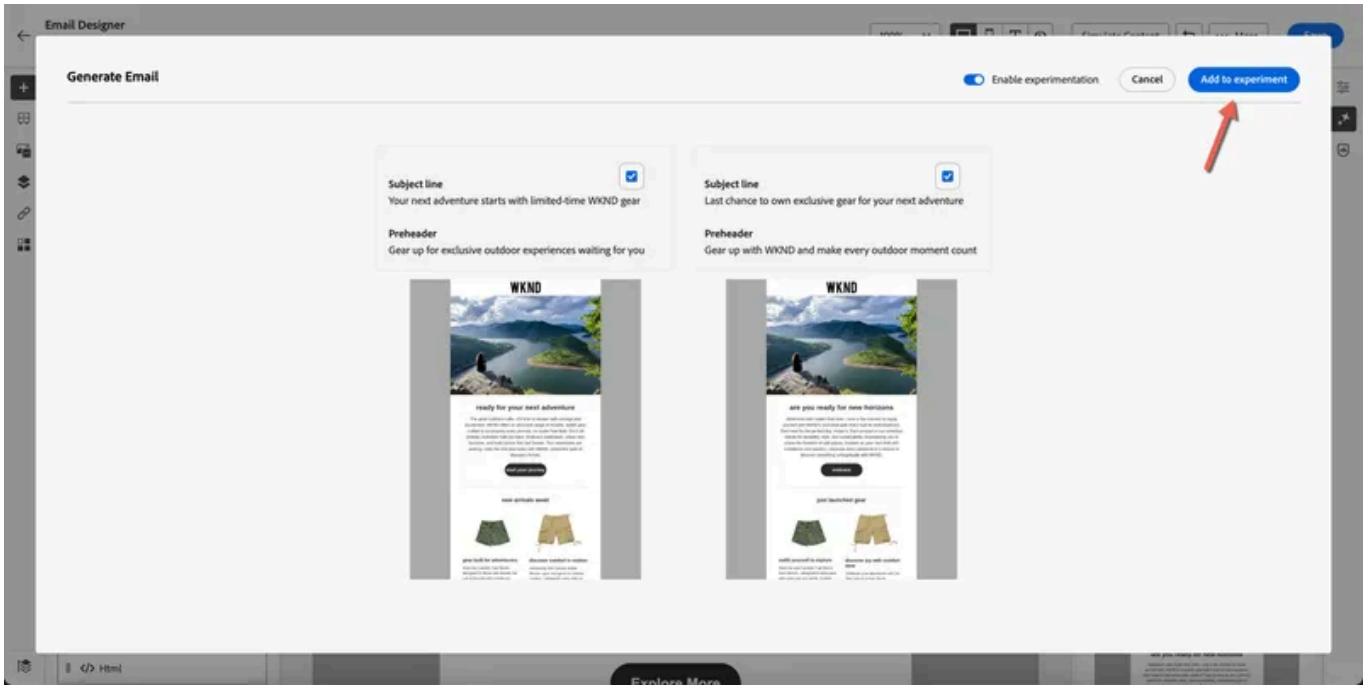
Here you'll see the score along with any warnings for content mis-alignments which you can review.



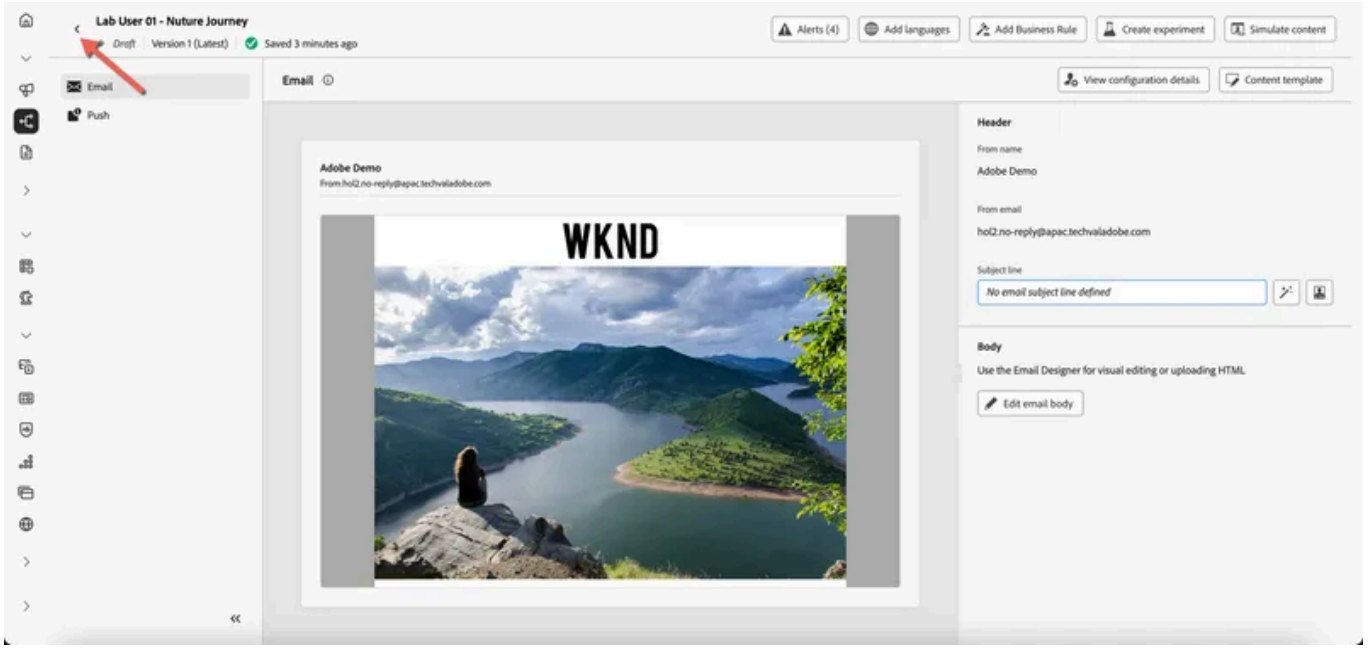
From here you can either select one of the variations to use as your email content or we can create an experiment and add the generated content as variations to test which performs the best. Click the **Enable experimentation** toggle.



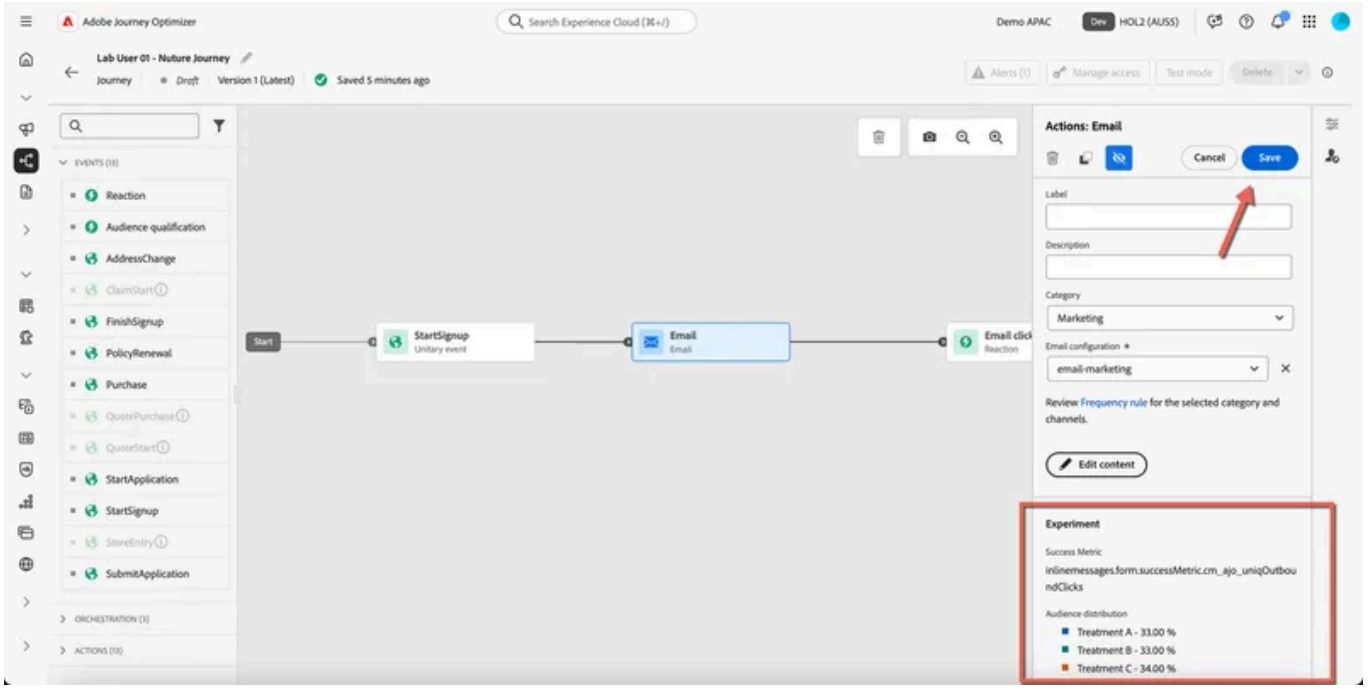
Choose one or both of the variations to **Add to Experiment**



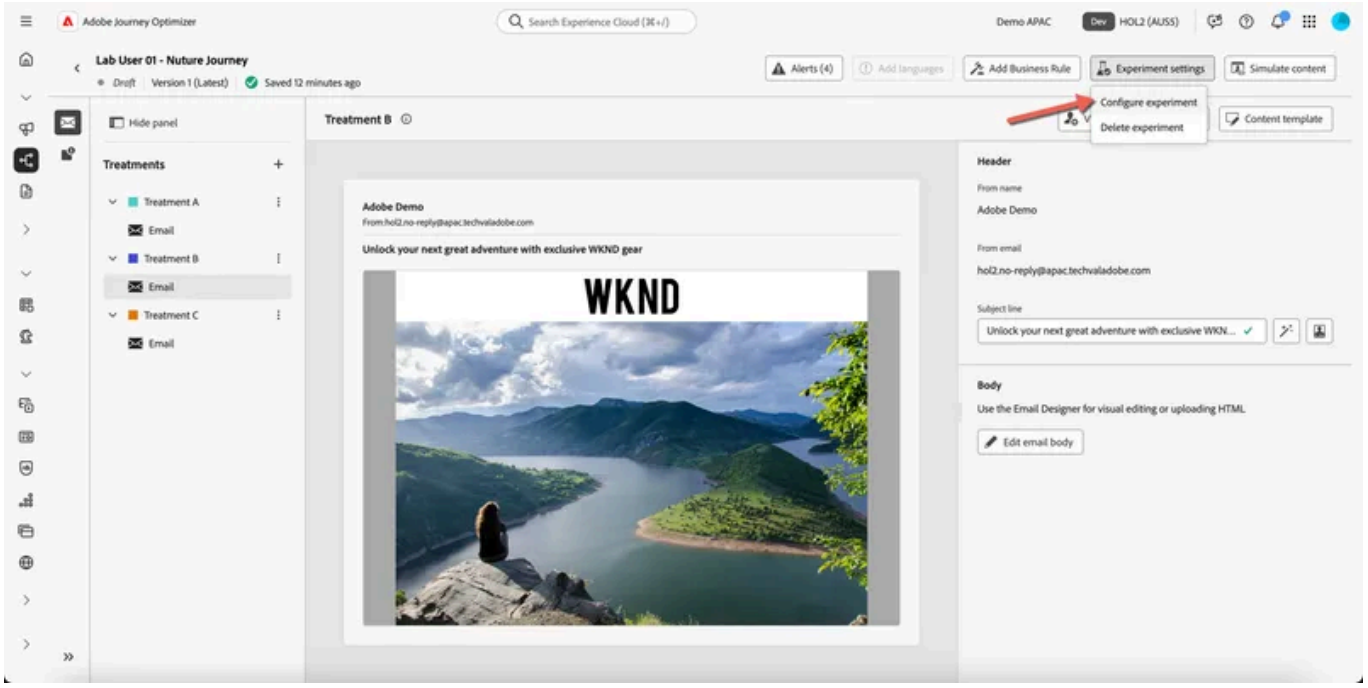
Click the arrow in the top left to return to the journey.



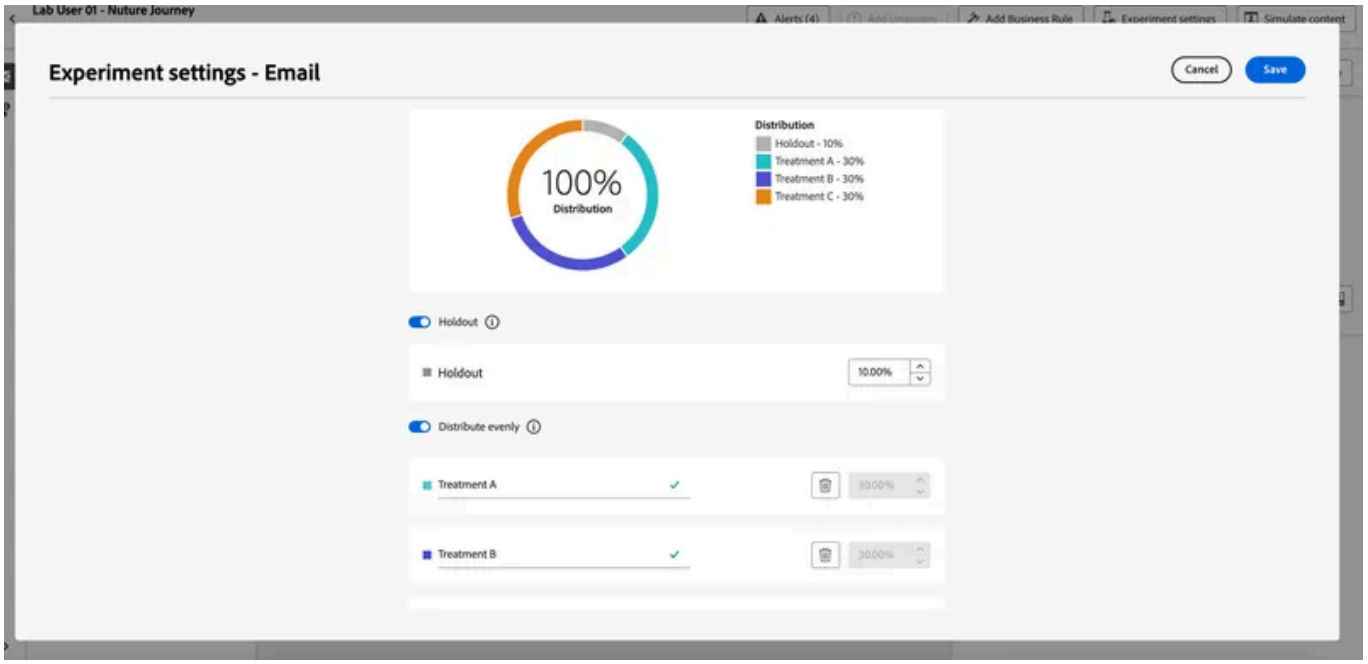
You can see the experiment configuration in the email properties from the journey canvas. Click to **Save** the email.



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

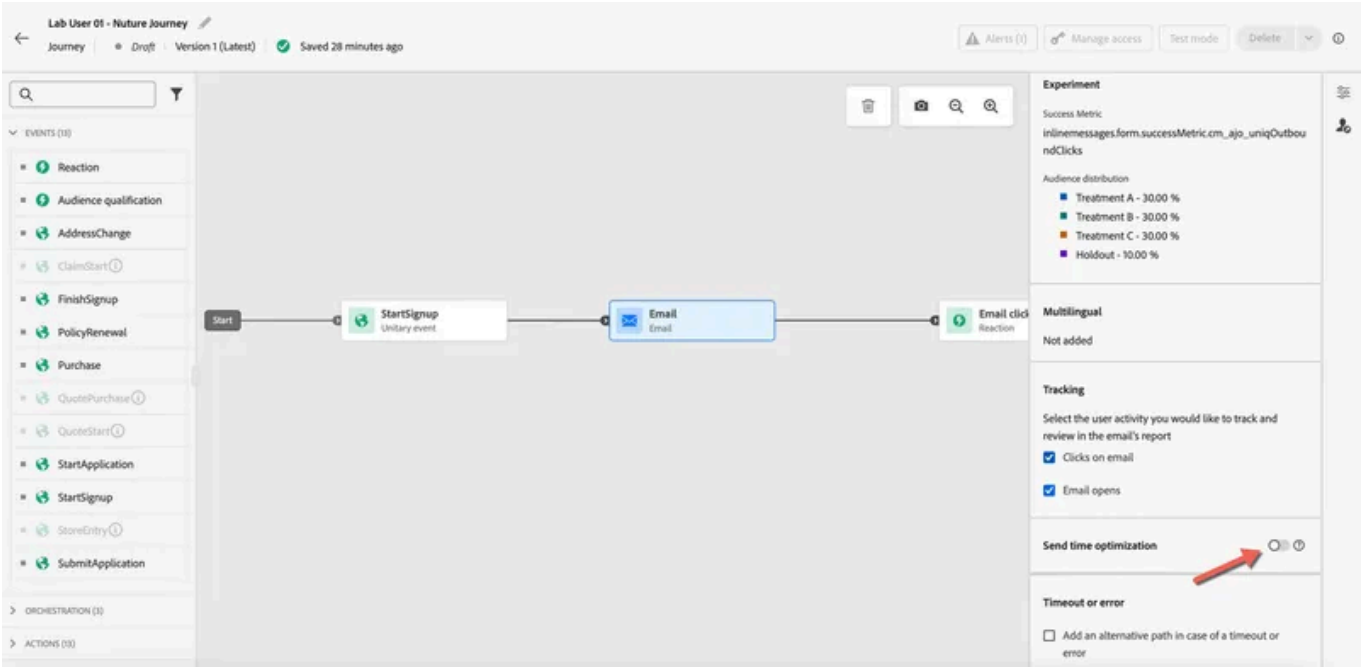


Here you can update the success metric that will be used for determining the outcome of the experiment and set a holdout group if desired. Click the toggles to add a 10% holdout and distribute the rest of the target evenly over the variations.



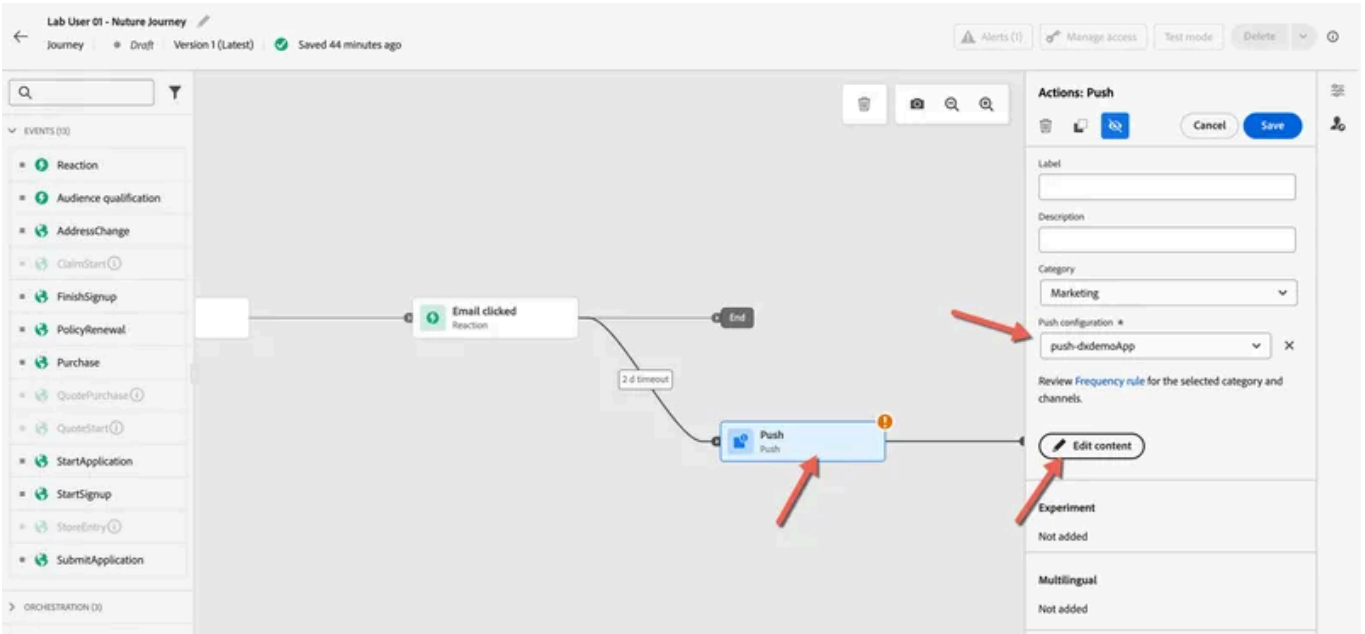
Click to **Save,** and return back to the journey canvas clicking the arrow on the top left.

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**.

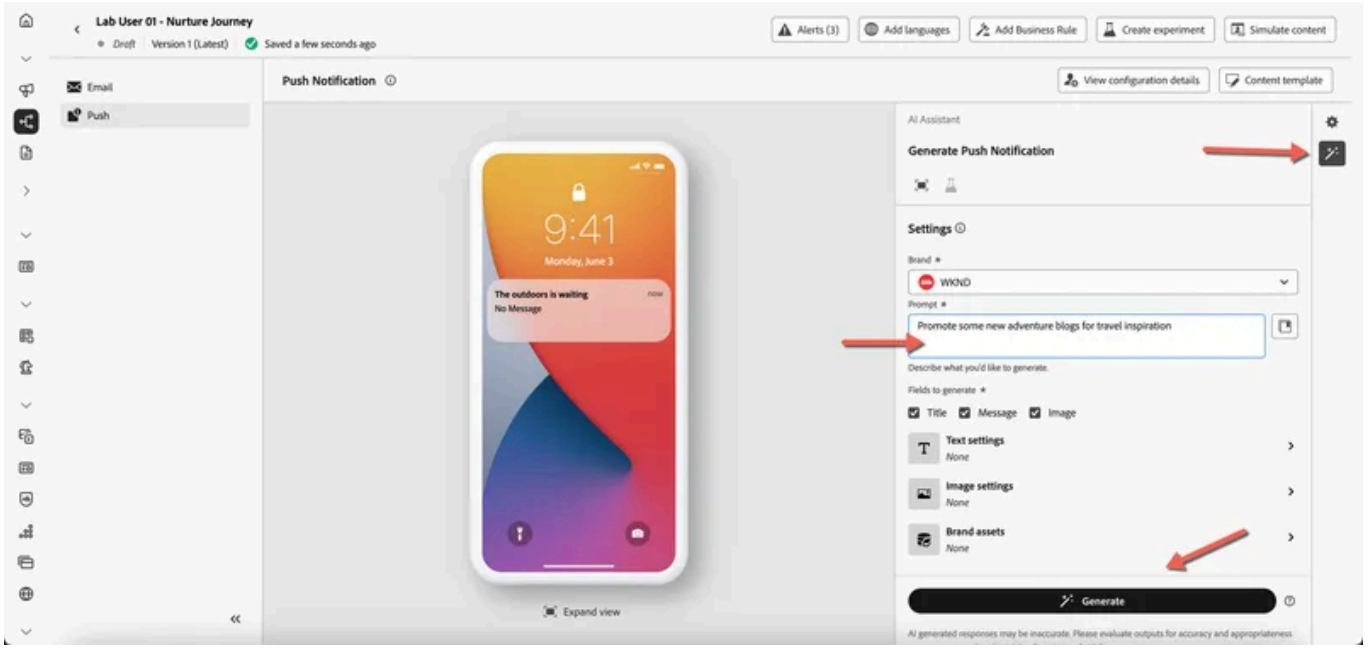


2.5 Add Mobile Push Content

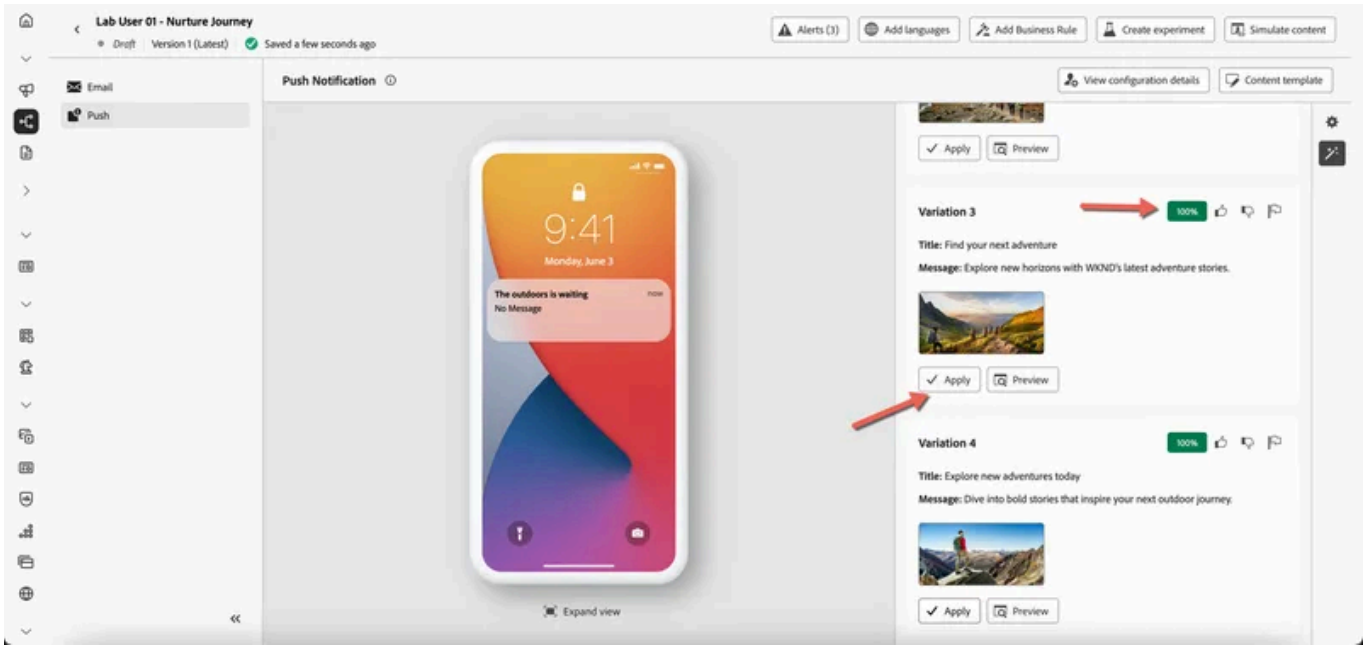
Lastly we'll add some content to our push notification, we can use AI Assistant to help with this as well. Click on the push notification action in your journey, set the configuration and click to **Edit Content.**



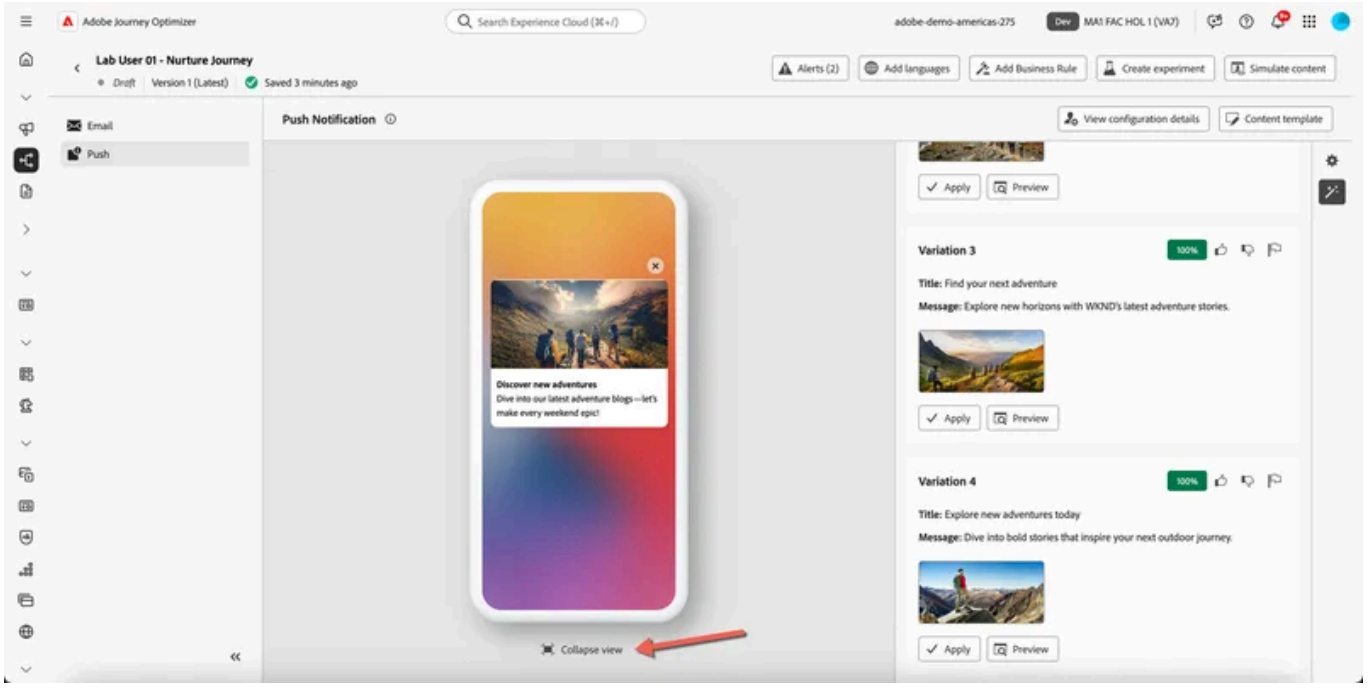
Open the AI Assistant, add a text prompt and tick the elements you want to generate (title, message and/or image). Click to **Generate**



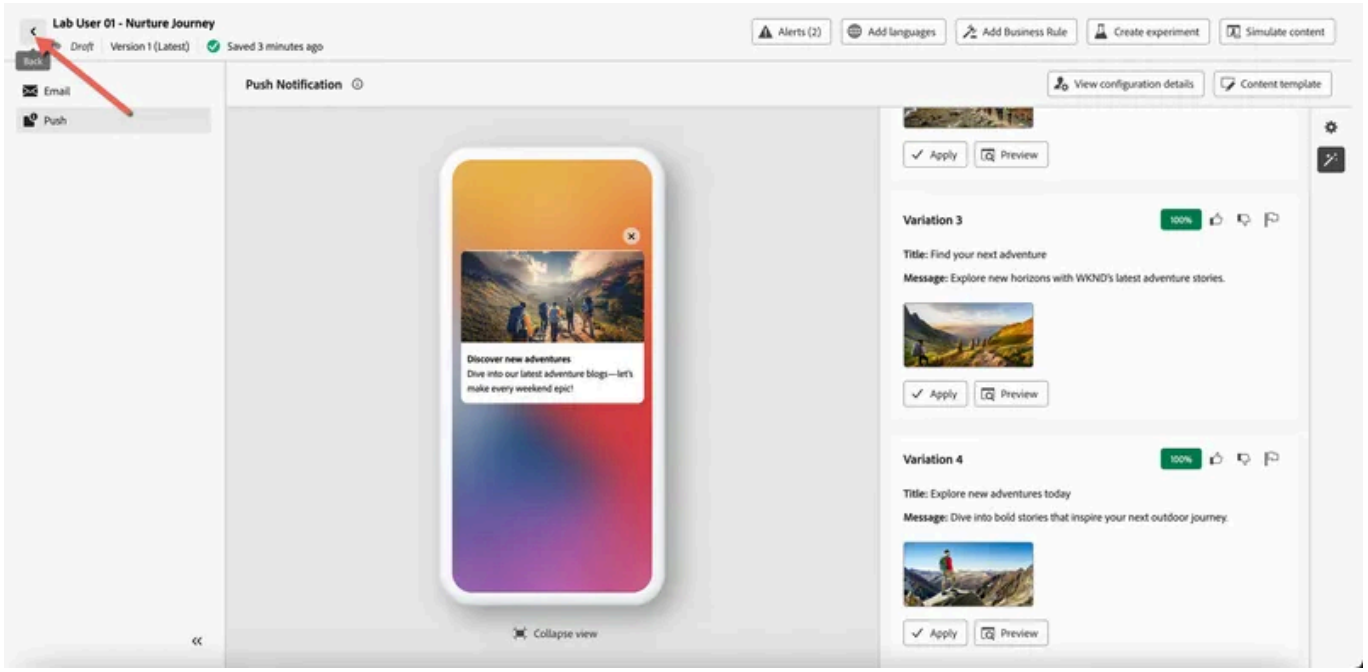
You can see the variations along with their brand alignment score, AI assistant has helped to generate a title a body and an image for the push. Click to apply your chosen variation.



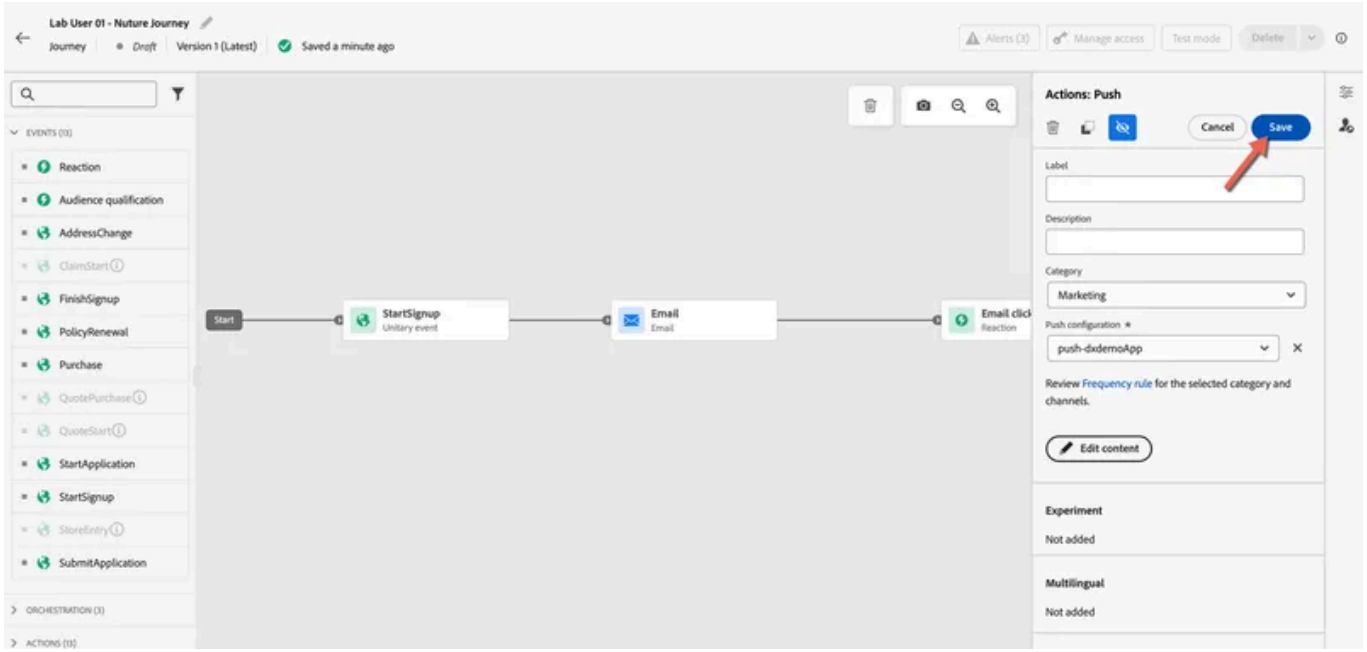
Use the expand view button at the bottom of the editor to show how the message will look when previewed before clicking through.



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 it's adhoc 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.

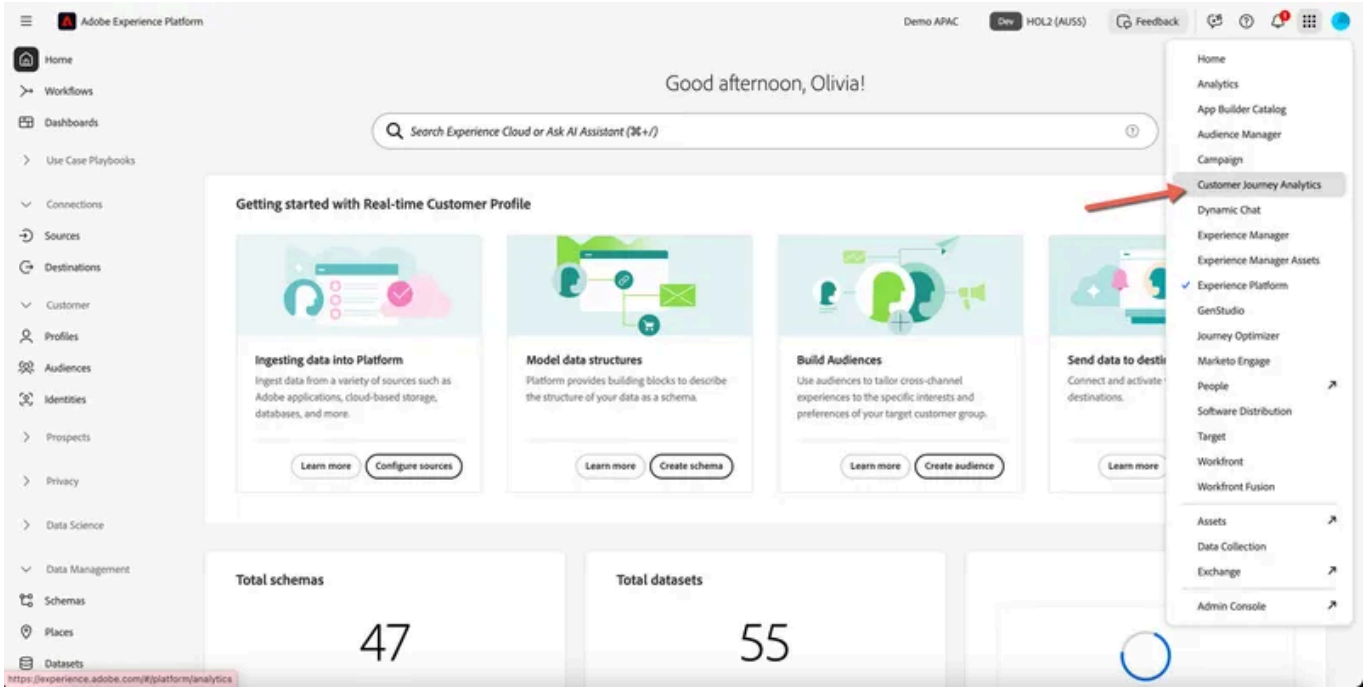
As an analyst you've been tasked with identifying and locating any current issues in their customer journeys and locate opportunities to divert offline interactions to digital channels.

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:

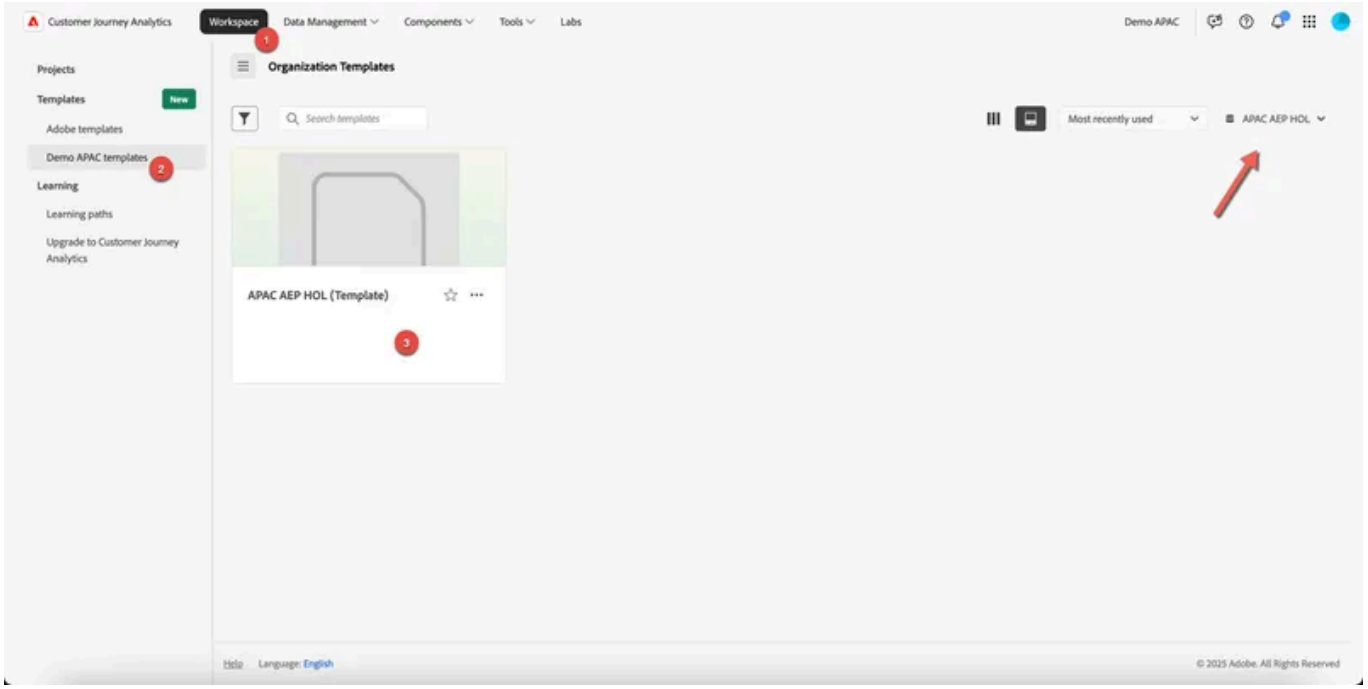


3.1 Create a project

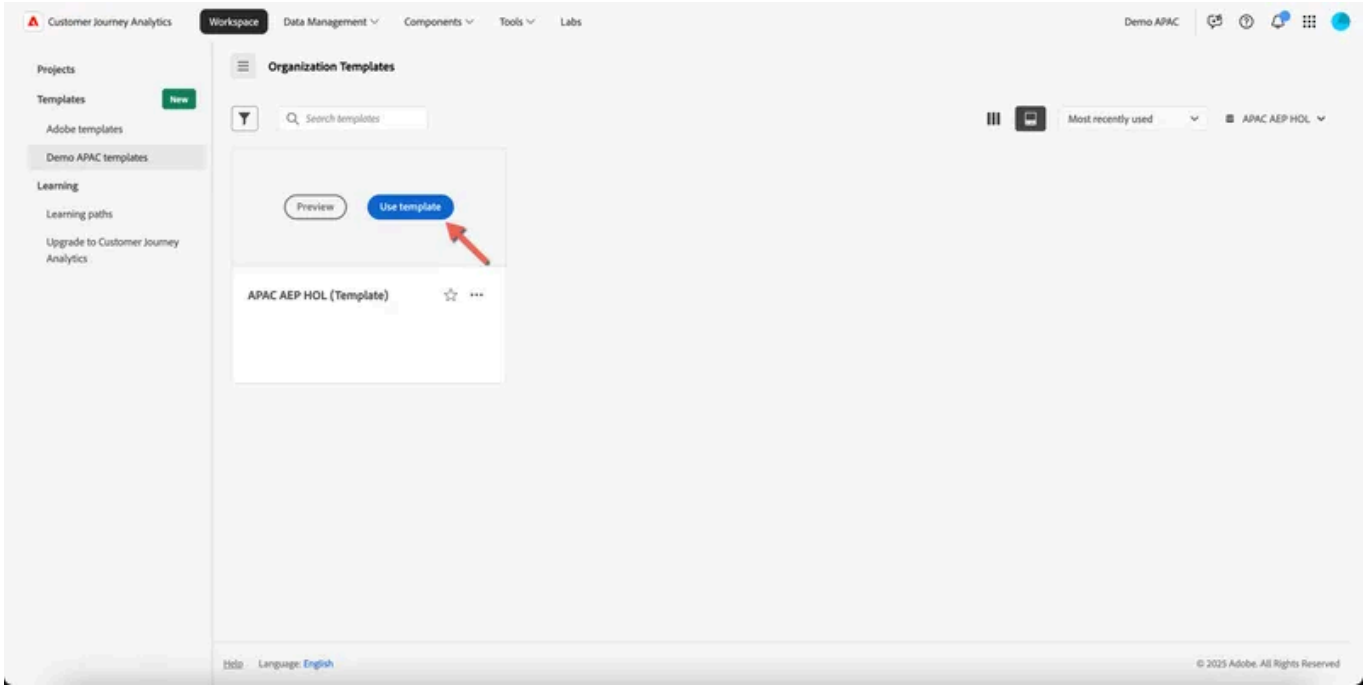
First we'll start by creating a new project from a pre-built template. This will provide you with some initial insights while giving you an isolated area to explore the data further.

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**



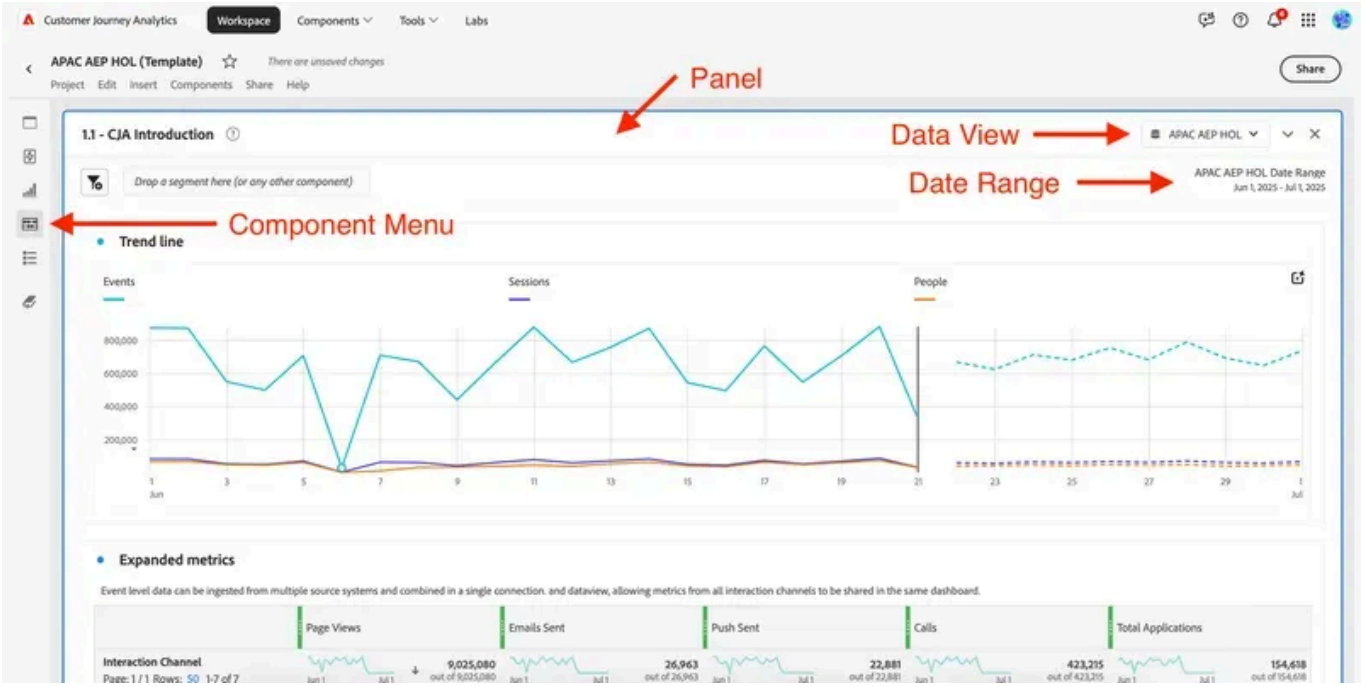
Take note of the following UI components:

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.

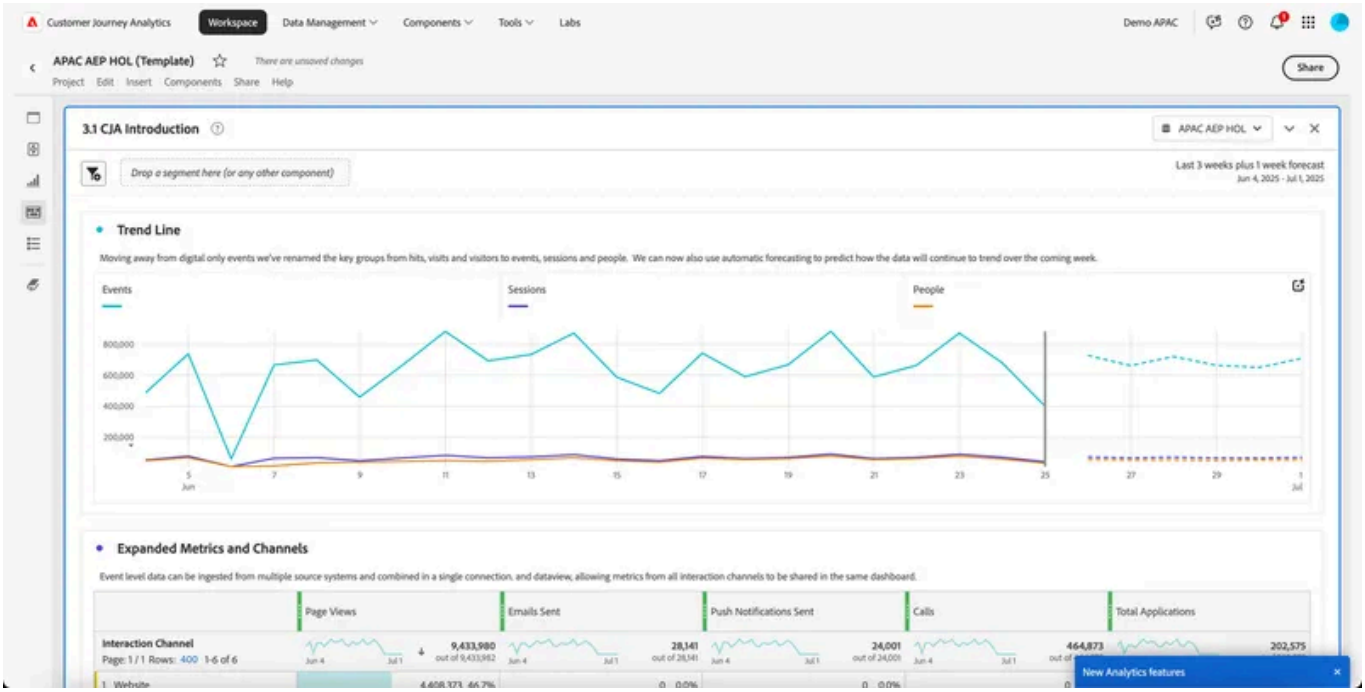
Date Range - The date range controls what data is displayed in the panel

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.

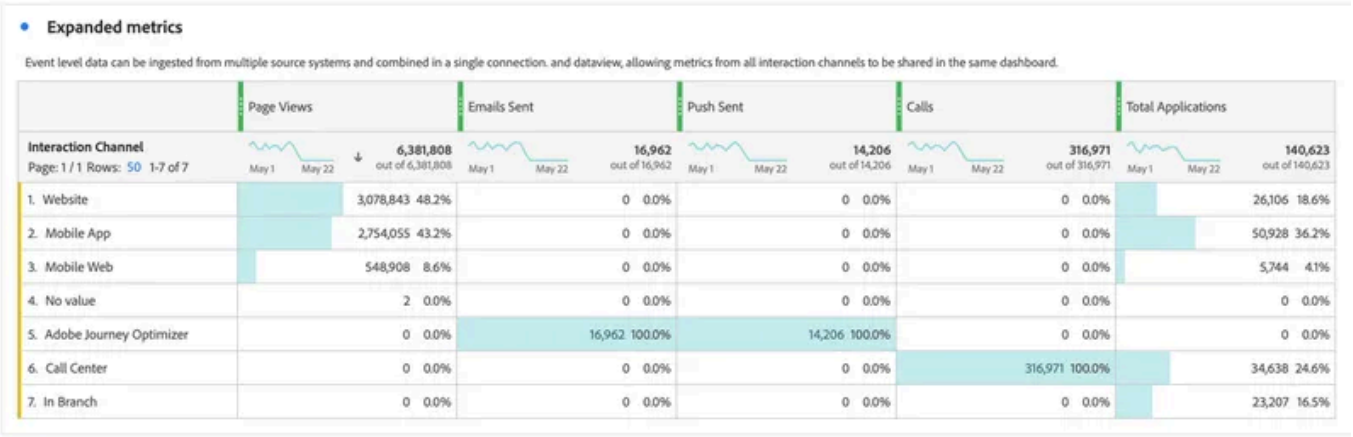
Risk management: By anticipating future events and trends, you can take proactive steps to mitigate risks and minimize potential losses.

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

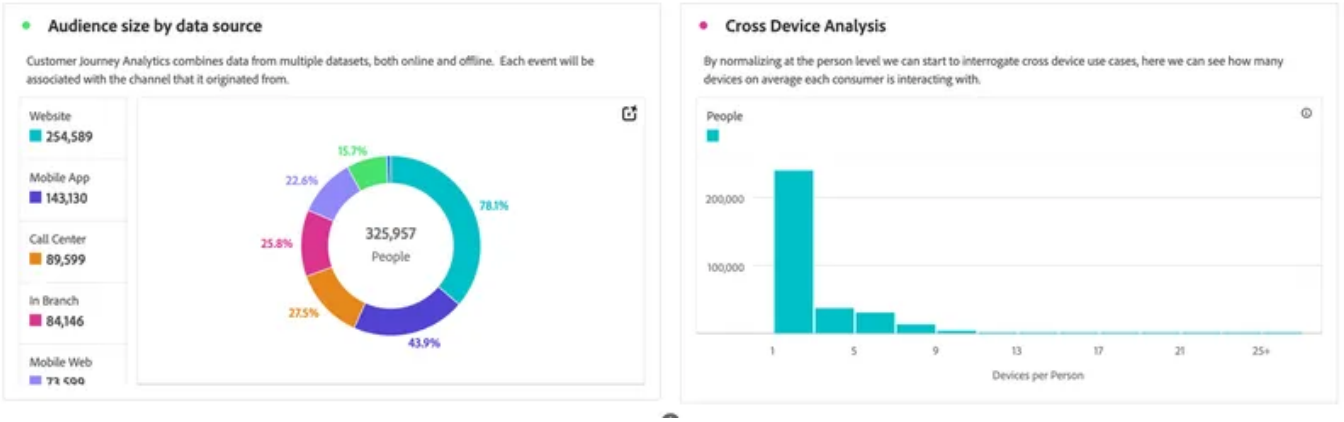
Performance evaluation: By comparing actual results to forecasted results, you can identify areas for improvement and make necessary adjustments.



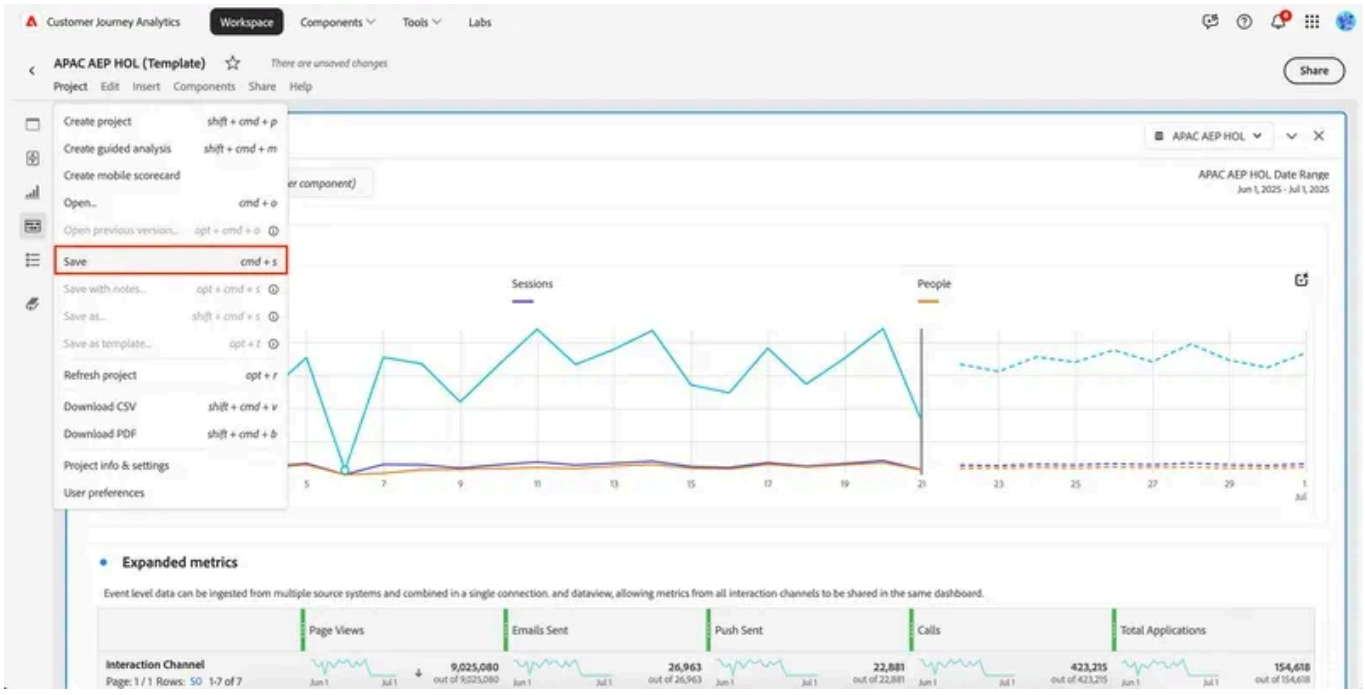
Since the event data ingested to CJA comes from multiple sources not just your website and app we can combine many different types of metrics into the same dashboard. Scroll down to the expanded metrics and you can see some examples of the types of metrics we can include and the source systems or **interaction 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**.



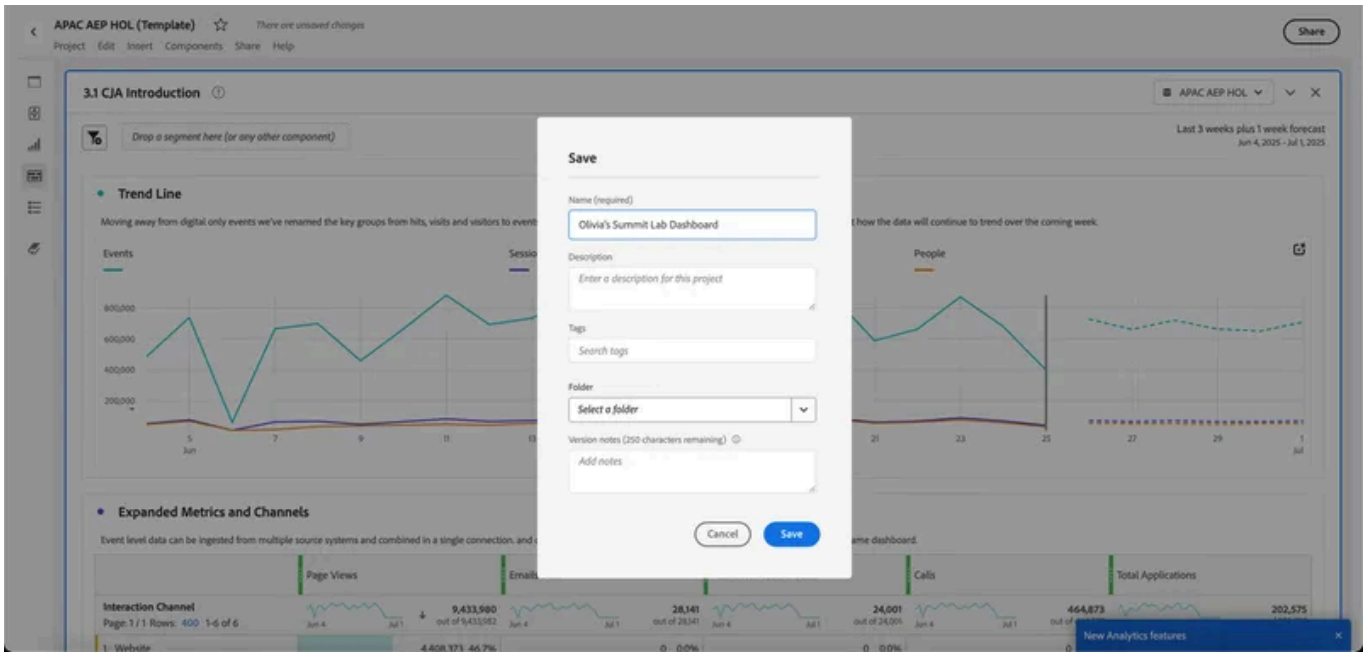
By grouping data at the person level, we can start to analyze things like audience size per channel and devices per person.



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.

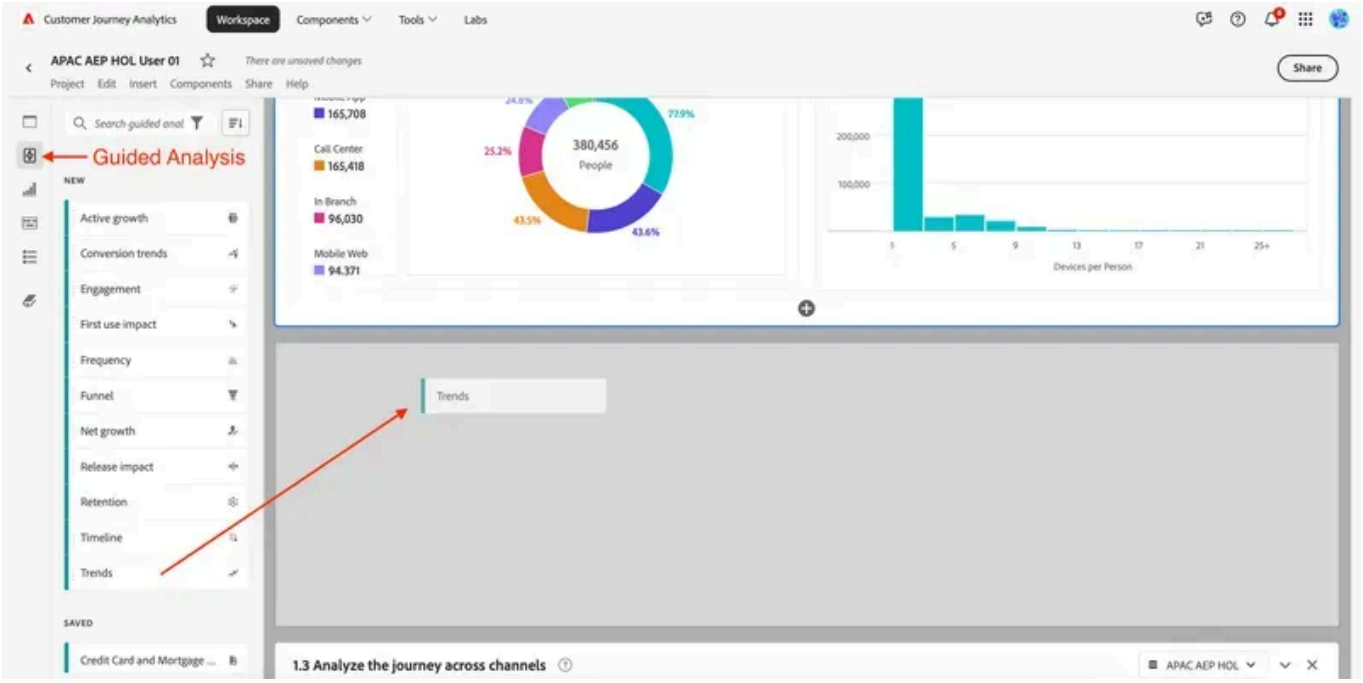


3.2 Guided Analysis

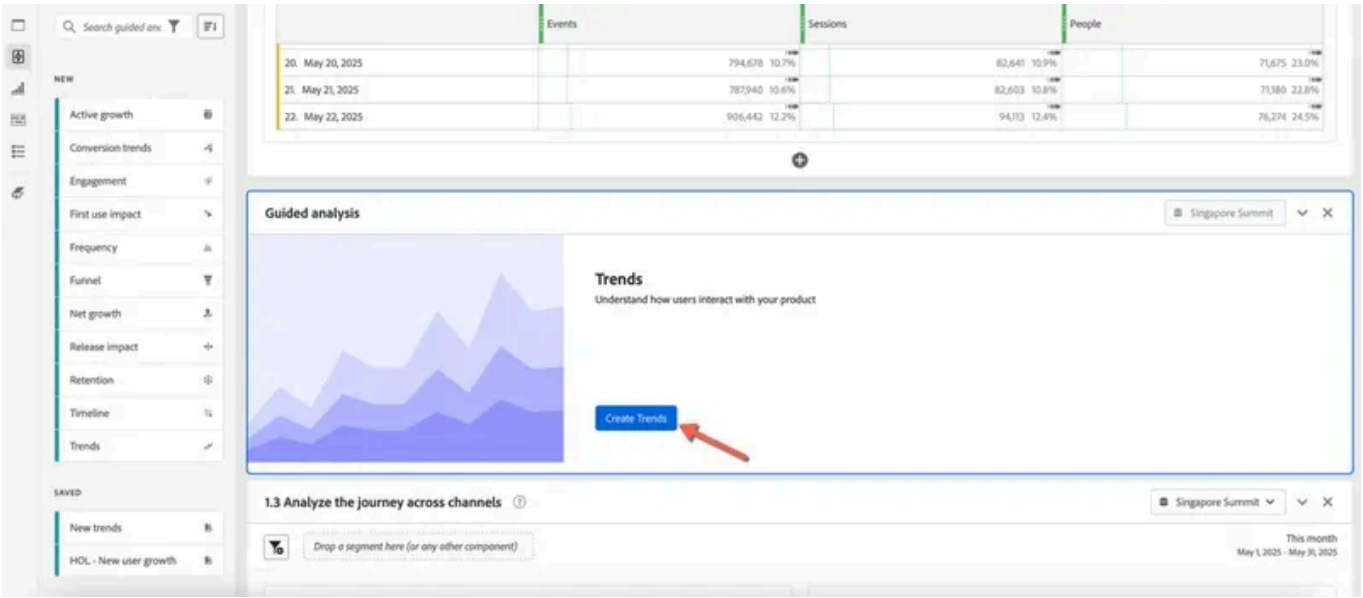
Let's take a look at how SecurFinancials new account applications are trending over the last few months.

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.

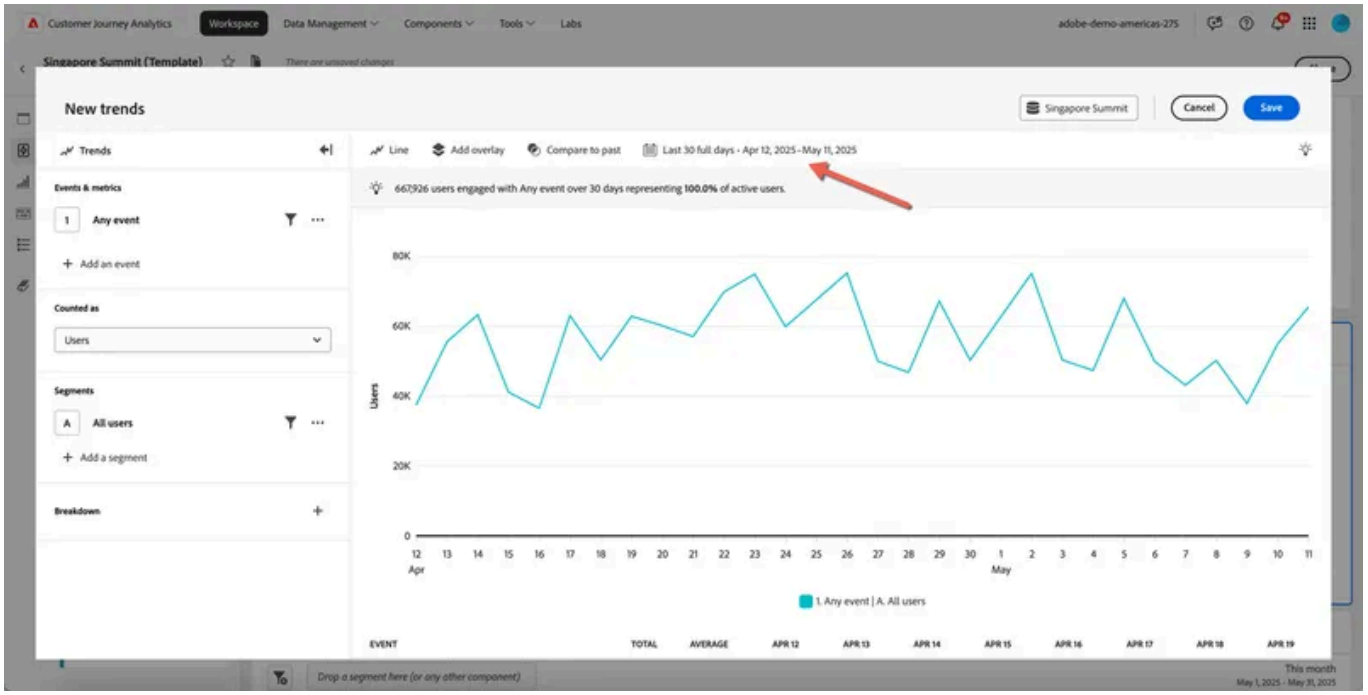
Open the Guided Analysis panel on the left hand side, and drag the **Trends** option into your dashboard under the first panel.



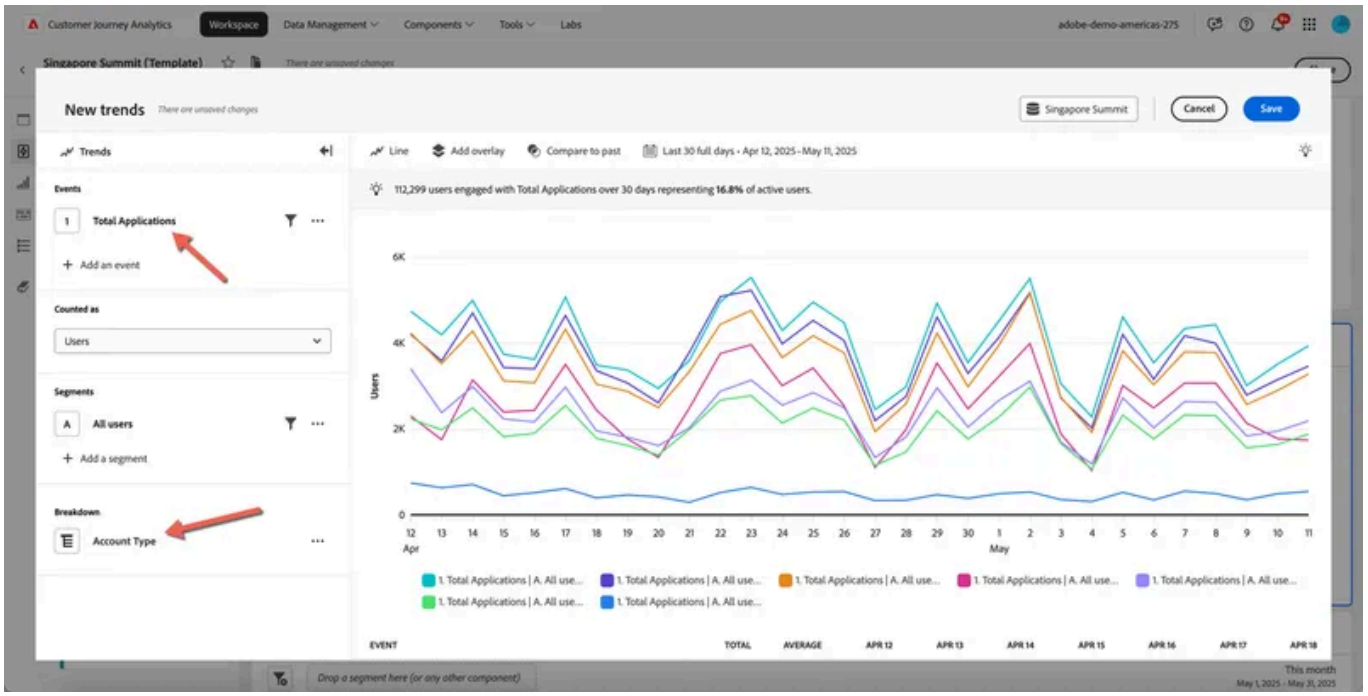
Click to **Create Trends**



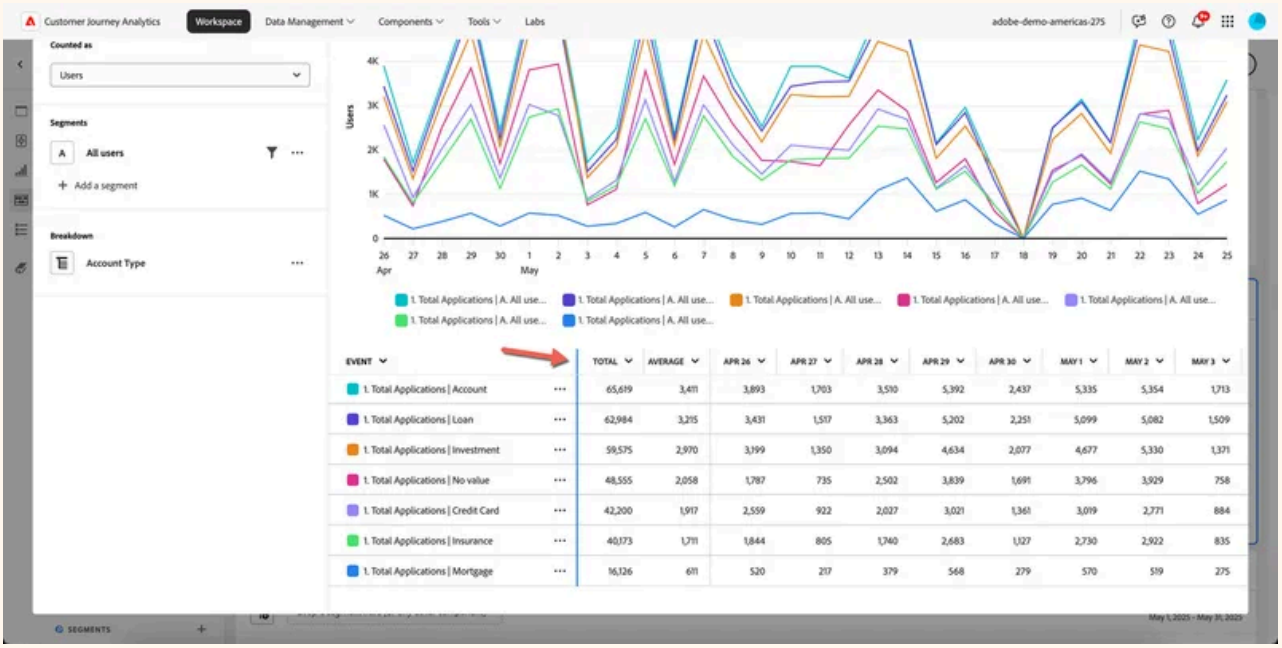
We are immediately shown a quick trend line of all events from the last 30 full days.



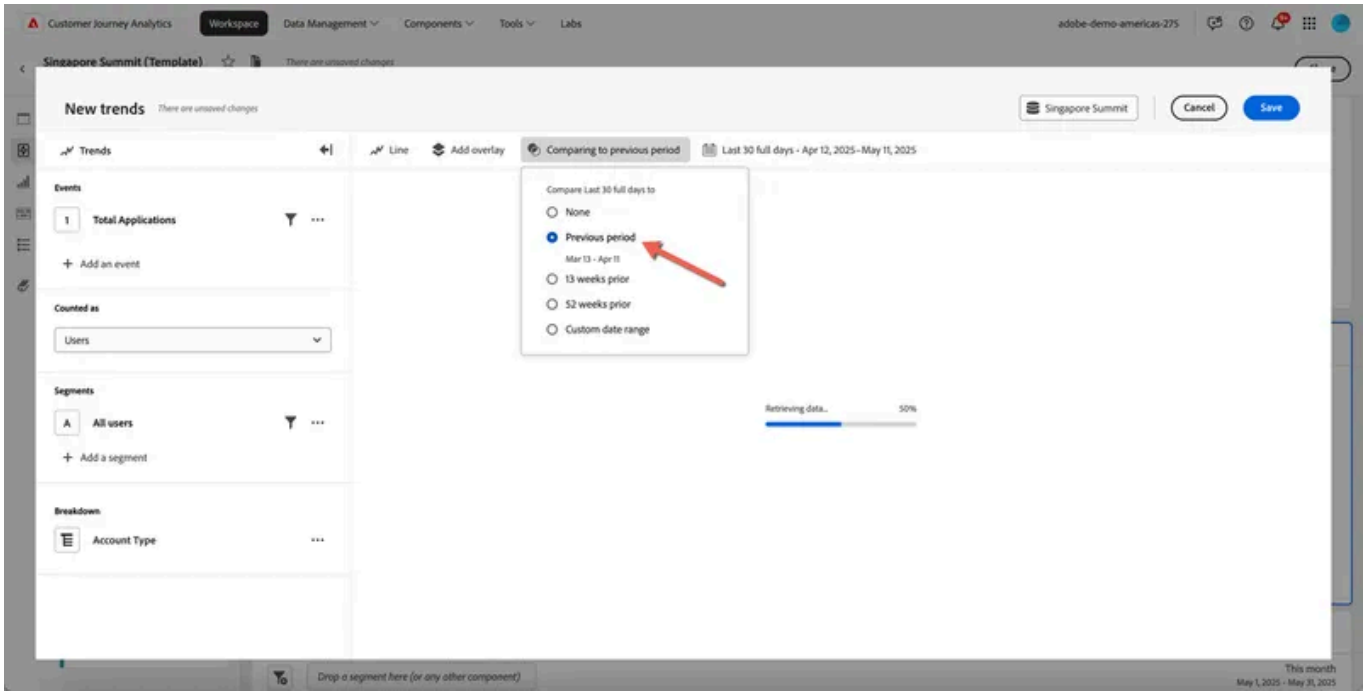
Change the Event that we want to analyse from Any event to **Total Applications** and add a breakdown by **Account Type.**



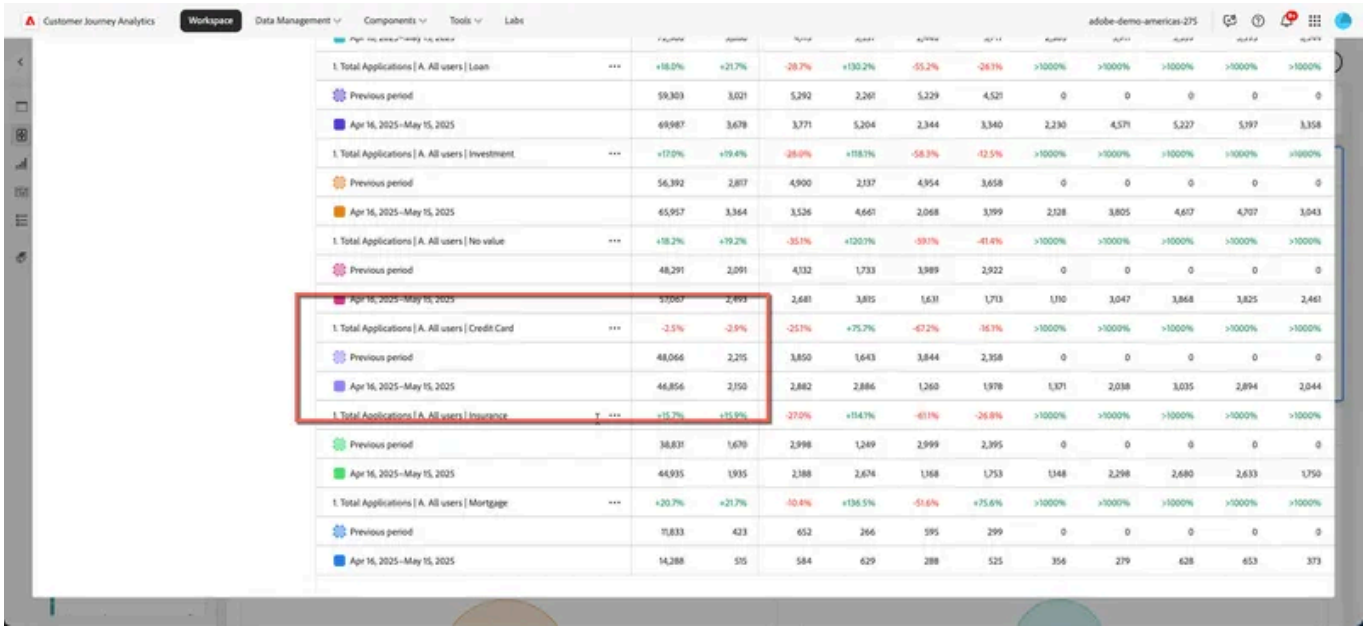
Top Tip - if you can't see the full event definition in the table, you can widen the column by dragging the column divider in the heading.



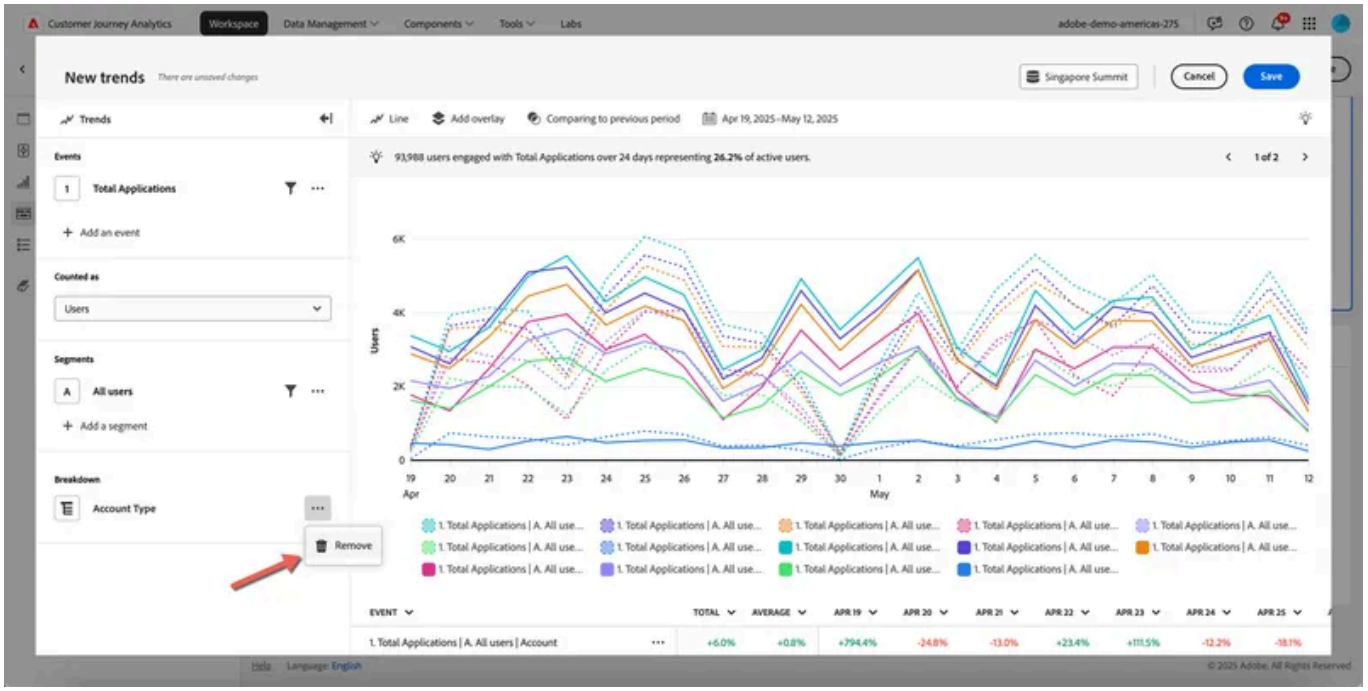
Now let's compare these results to those from last month. Click on **Compare to past** and select **Previous Period.**



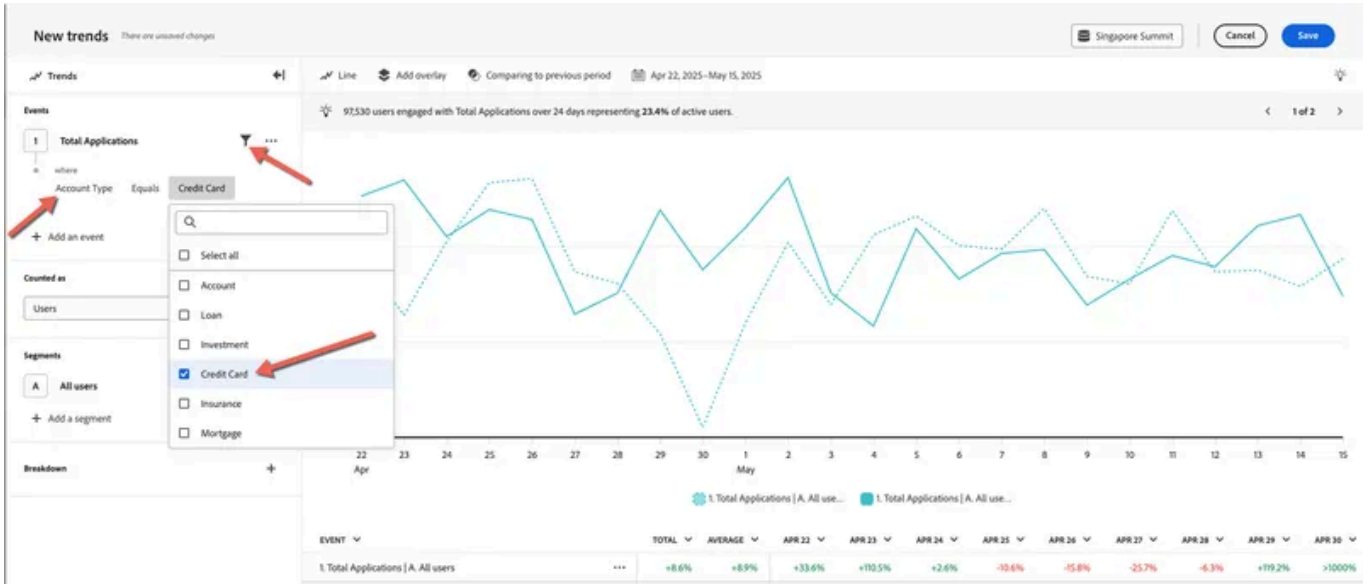
We can see that applications for most account types have seen a small increase month on month, but credit card applications have declined.



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



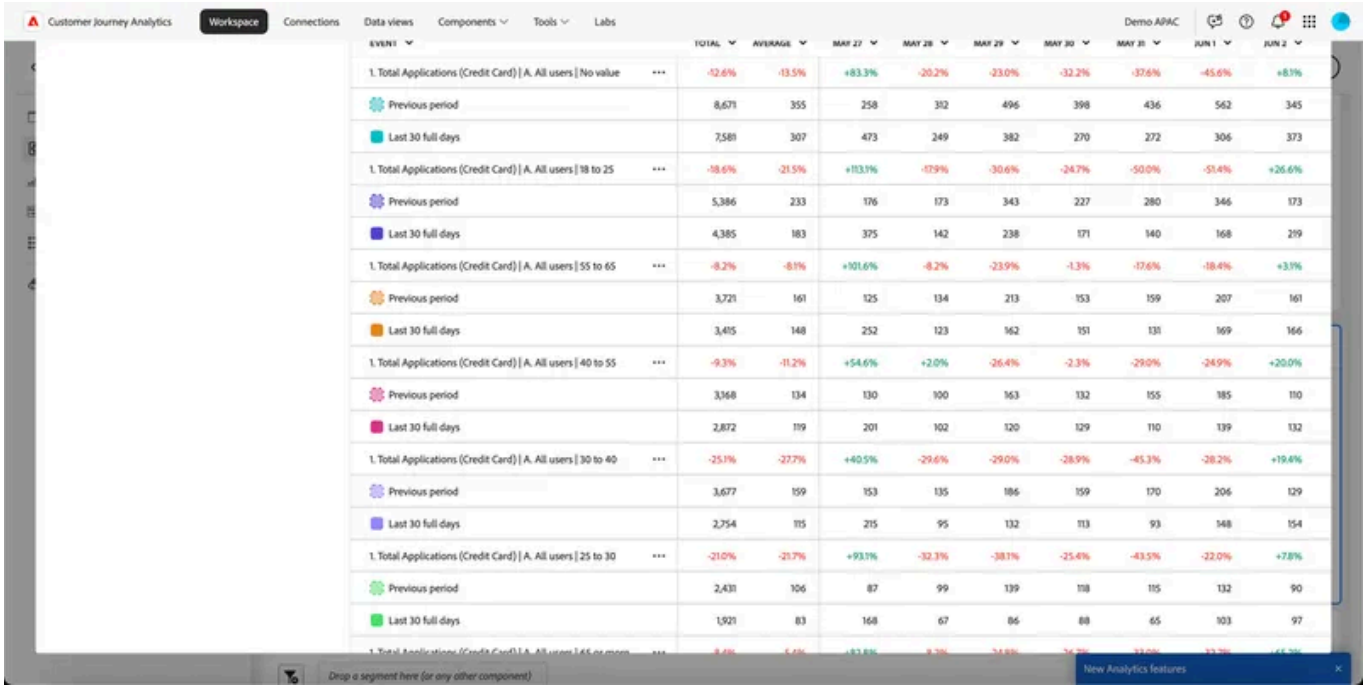
Now add a filter on our events to include only credit card applications.



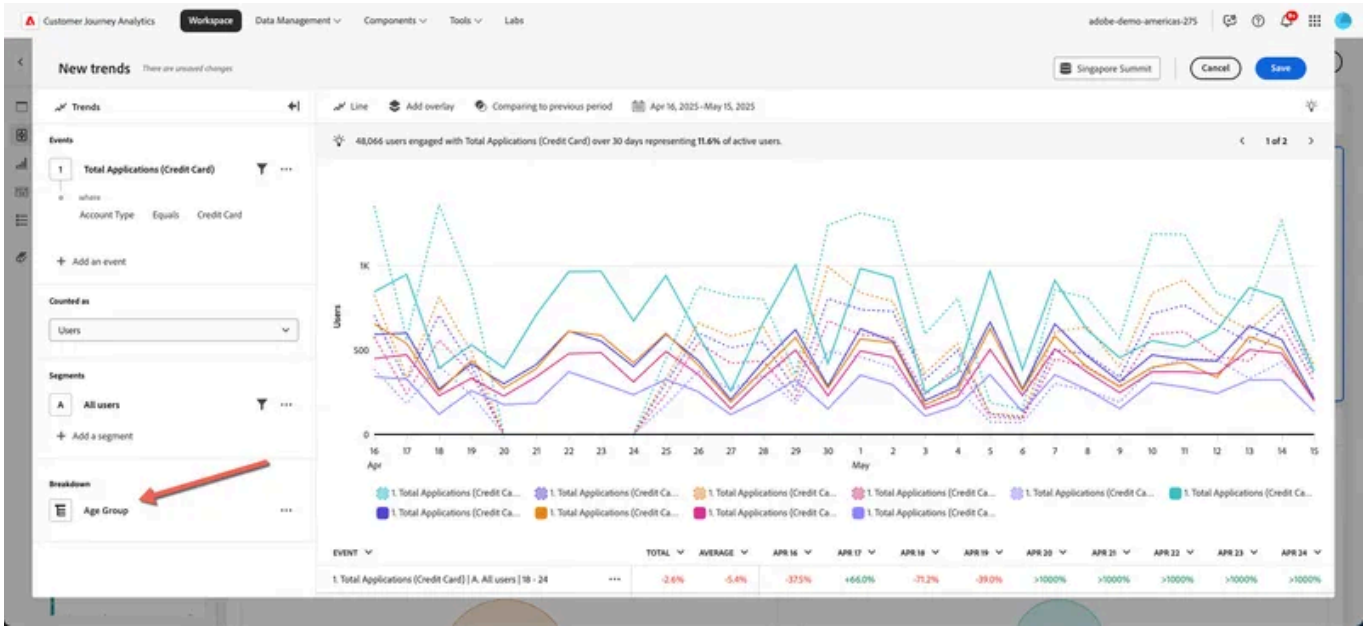
Let's break it down now by interaction channel.



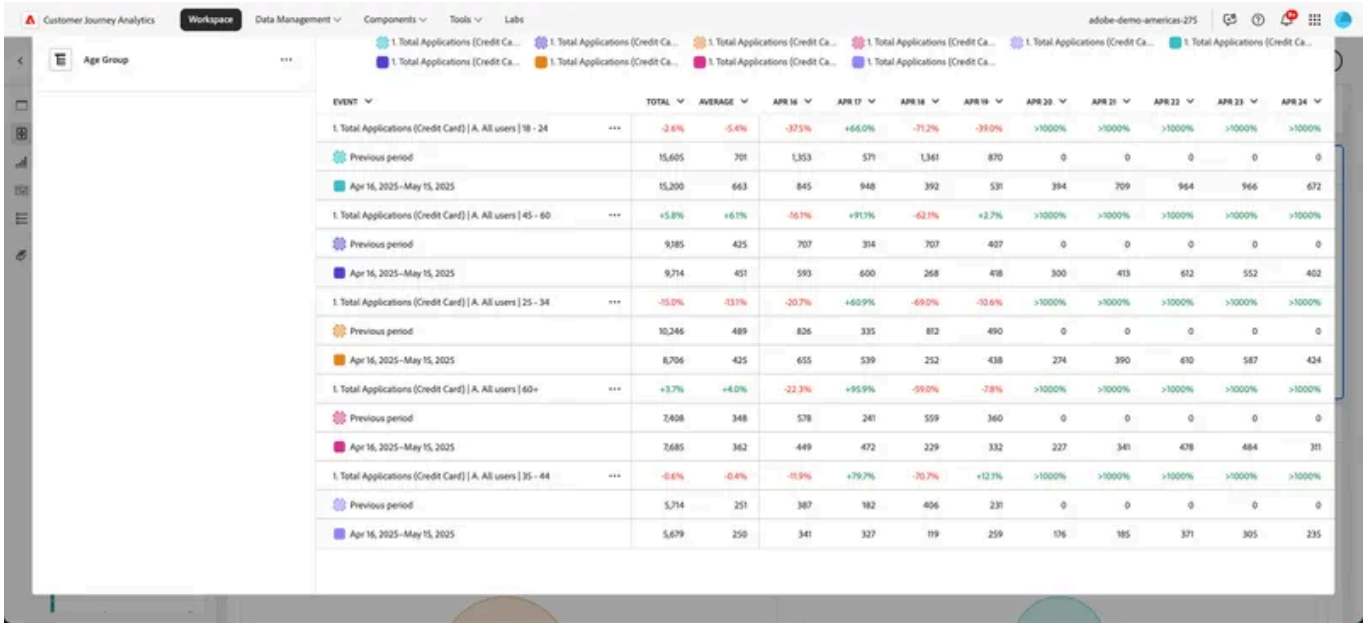
We can see that Web and Mobile Web are performing particularly poorly while call center and in branch applications have increased. Perhaps there is some friction on these channels which is driving customers to the call center and/or in branch?



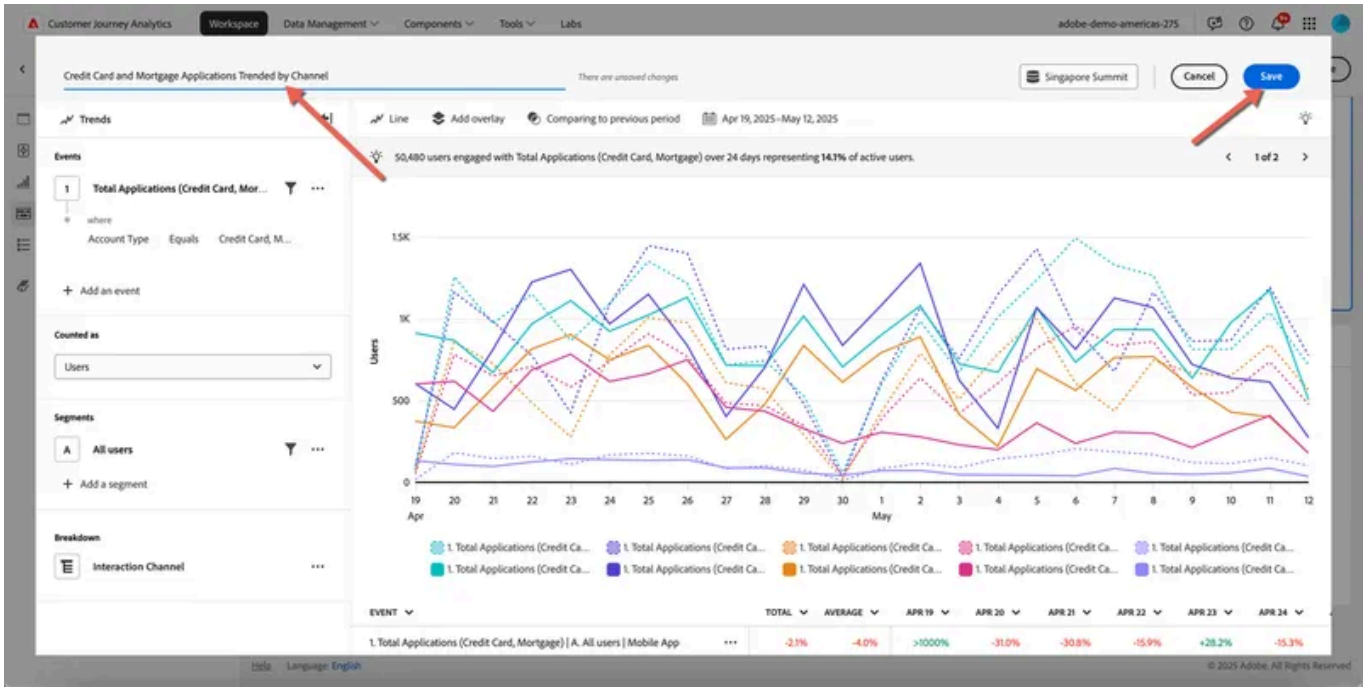
Now let's use some profile information to analyse it further, change the breakdown from Interaction Channel to Age Group.



We can see that the drop in applications is coming predominantly from the younger age groups 18-24 and 25-34



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 impacting younger applicants between the age of 18 and 34.

Hypothesis:

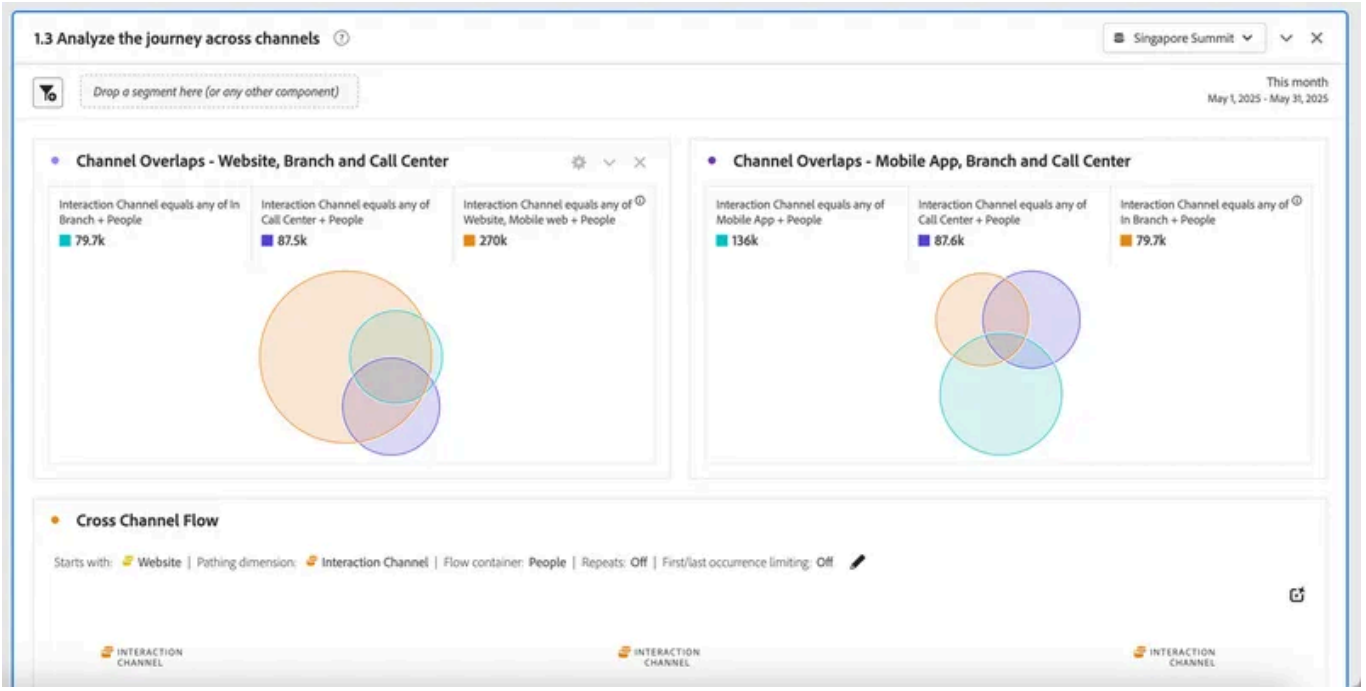
- Customers seem to be getting stuck during the application process and are either dropping off or transferring to offline channels.

3.3 Analyzing the Journey

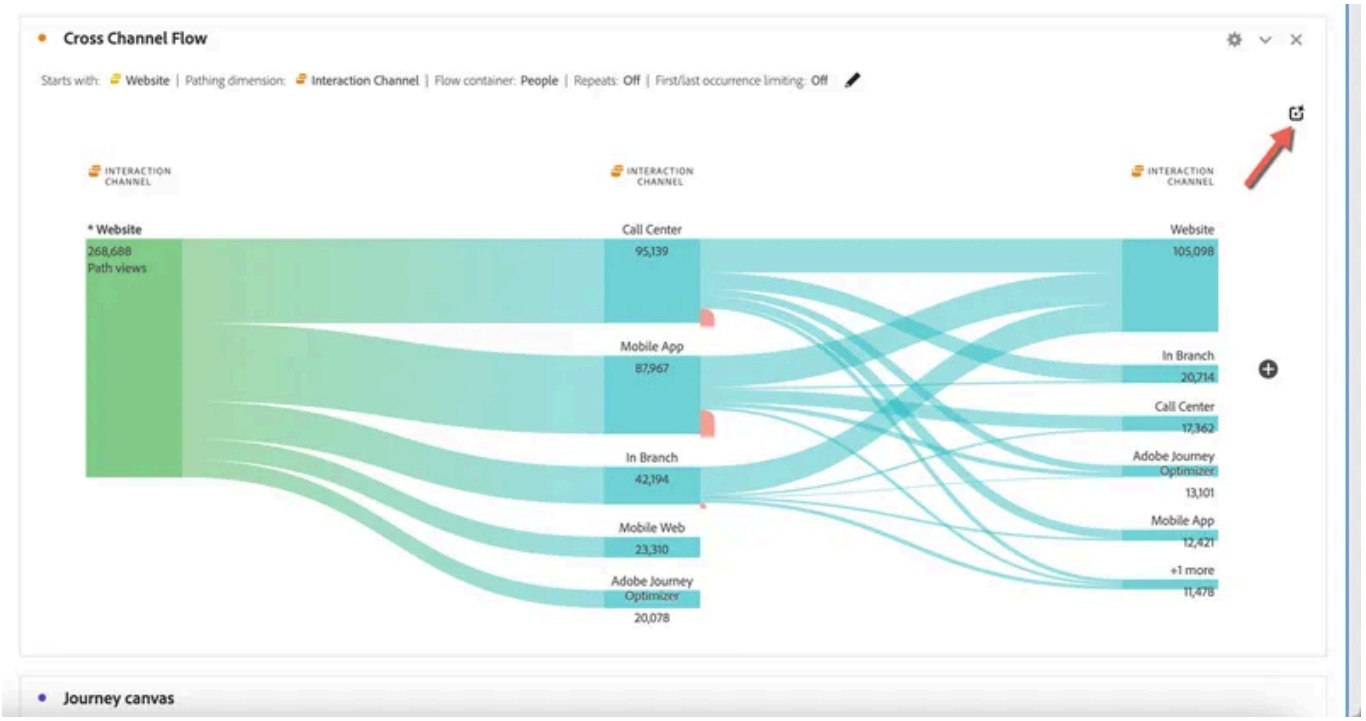
Now that we've generated some quick insights through the guided analysis, let's validate our hypothesis through some cross channel journey analysis.

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

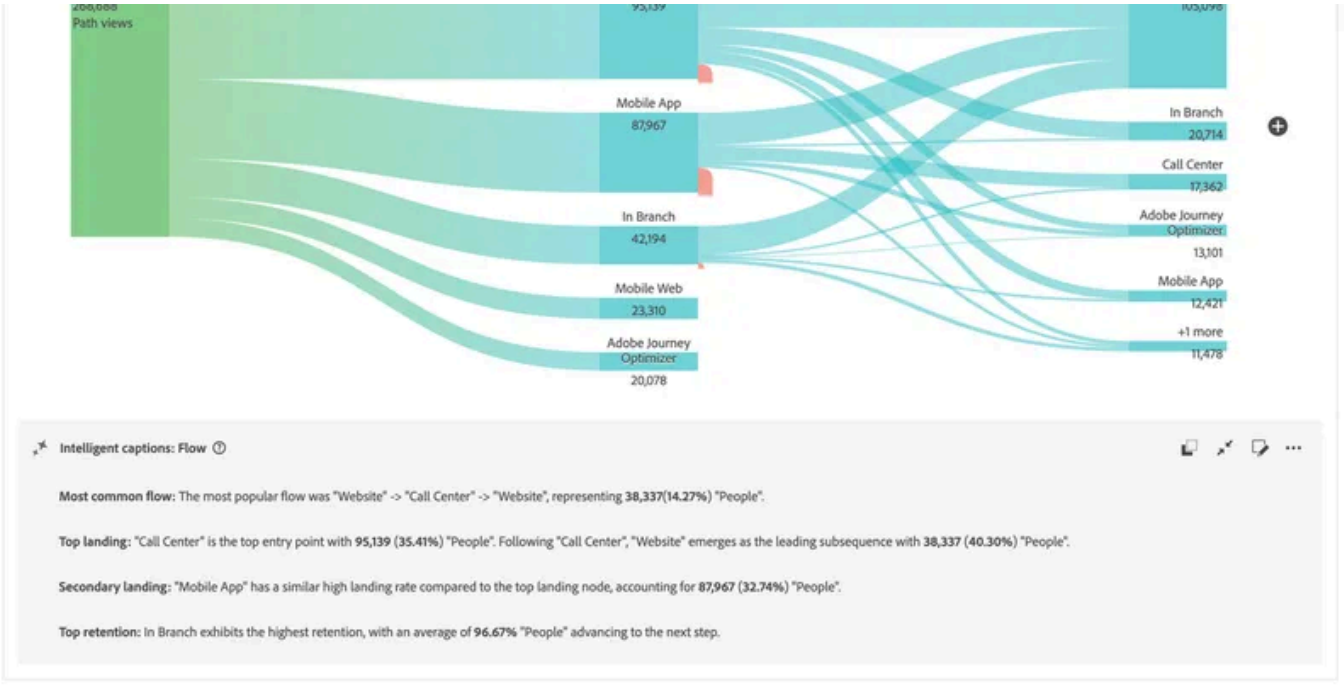
Here we can see the overlap of people interacting across channels. The **Channel Overlap** venn diagrams show the overlap of customers engaging on the website AND the call center or in branch is much higher than those who engage on the mobile app.



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.

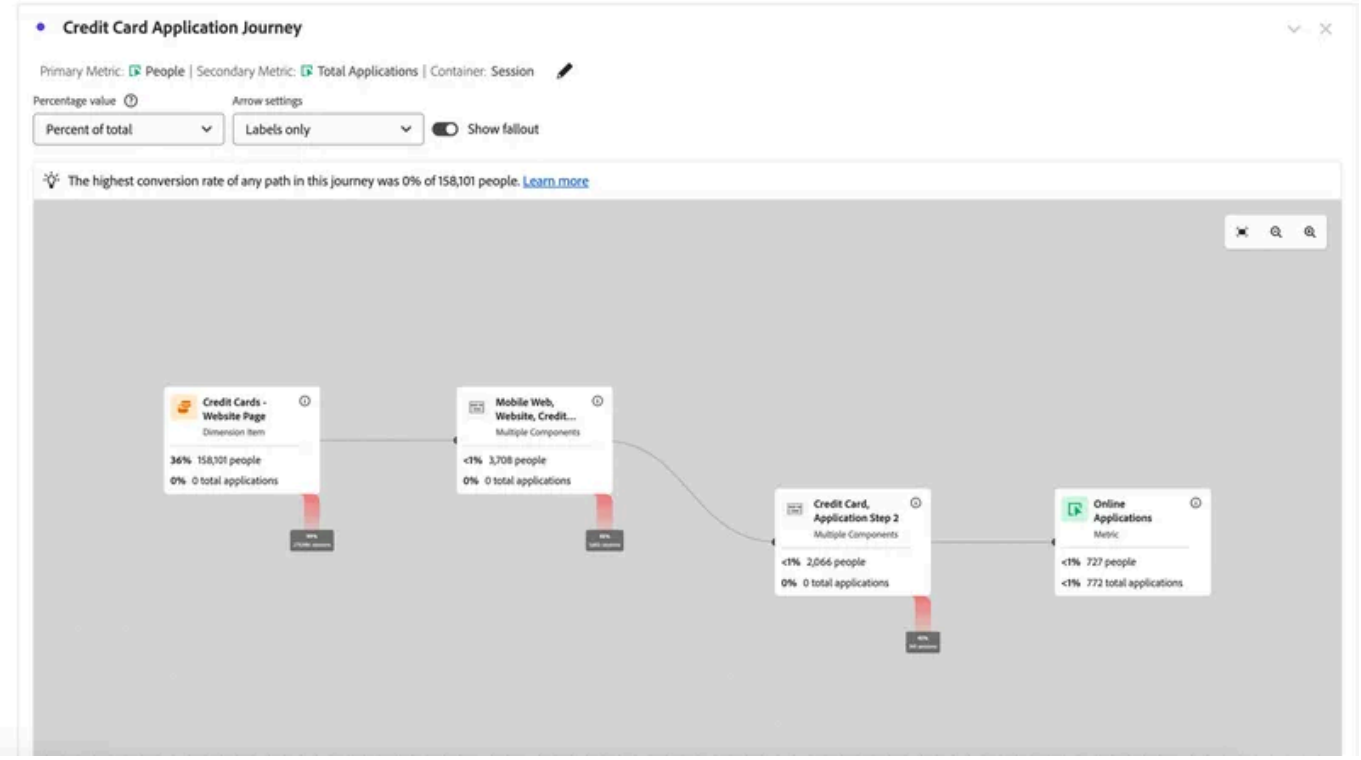


Intelligent Captions provide high level takeaways allowing you to share your findings easily with other users. Use the arrow icons on the right to expand and collapse the captions.

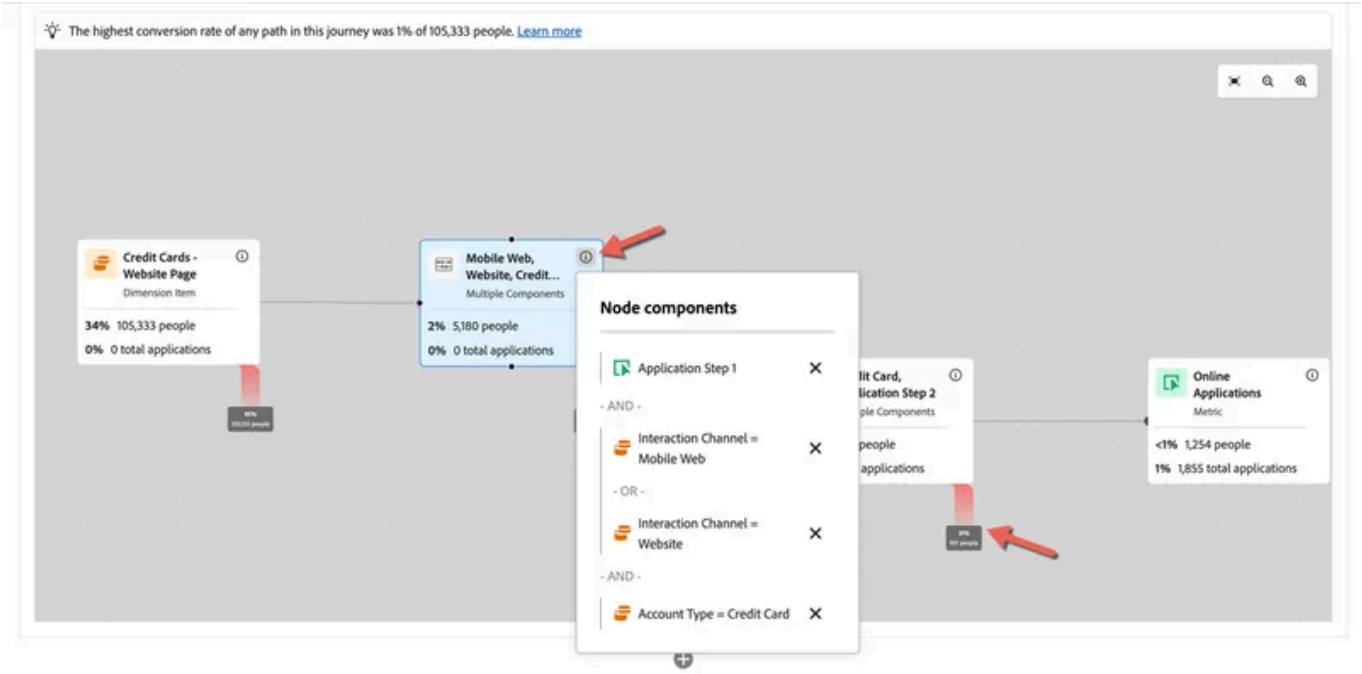


The flow visualisation is great for high level analysis but CJA's journey canvas allows us to drill into exactly which paths customers are taking and where they are falling out of the expected trajectory.

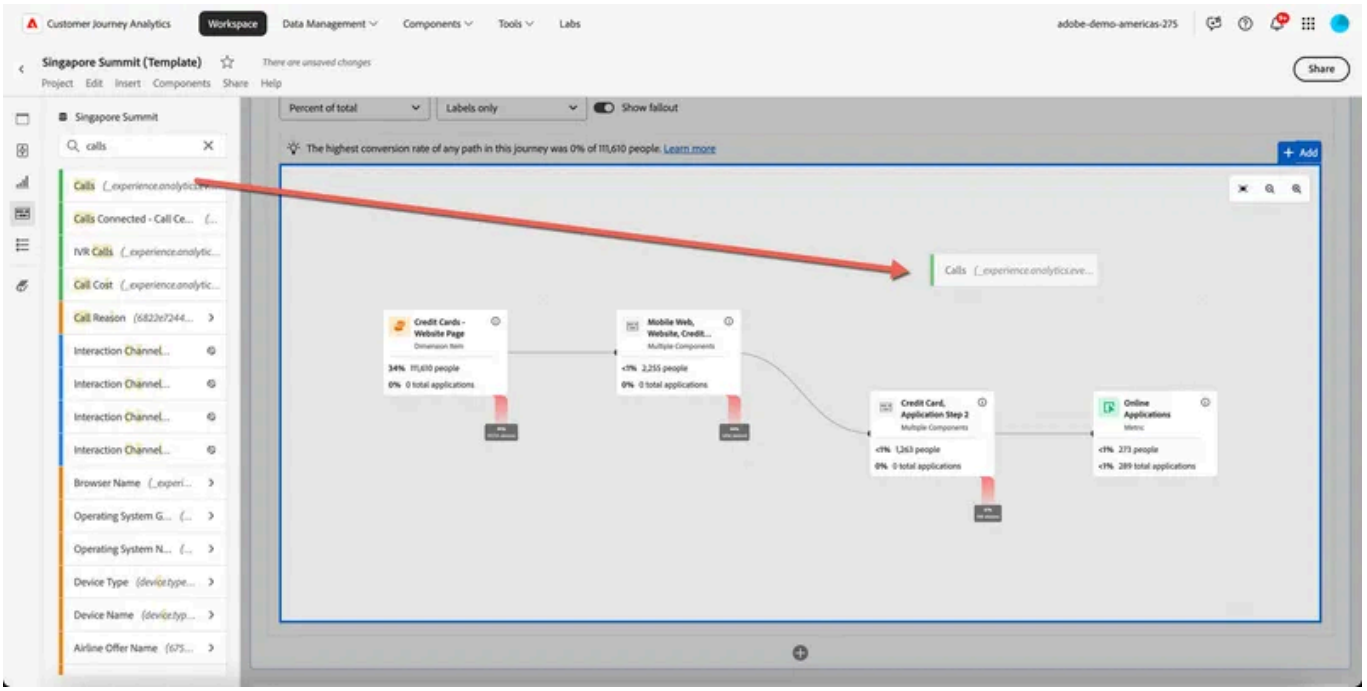
Scroll down to the **Credit Card Application Journey Canvas.** It has been prepopulated to show the expected journey from viewing the credit card page on the website to completing an online application.



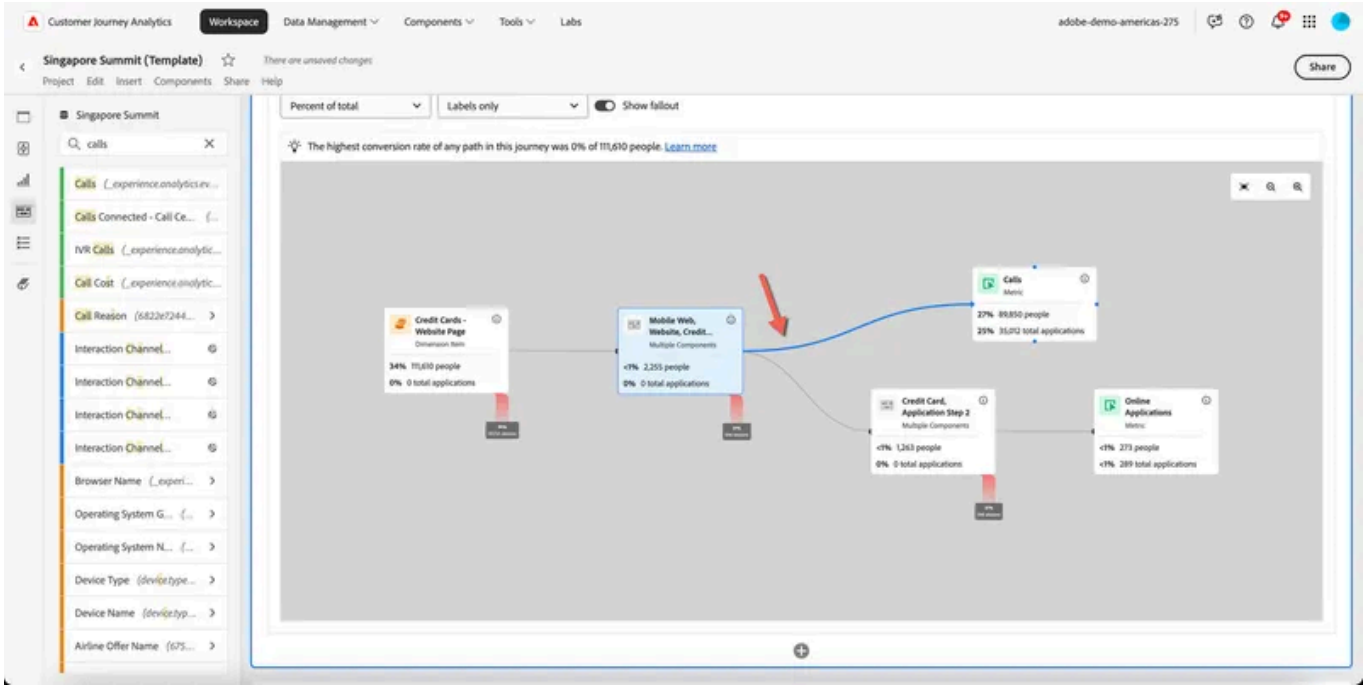
Click on the i icon in the node to see the components that make it up. The red line shows the fall out between each node.



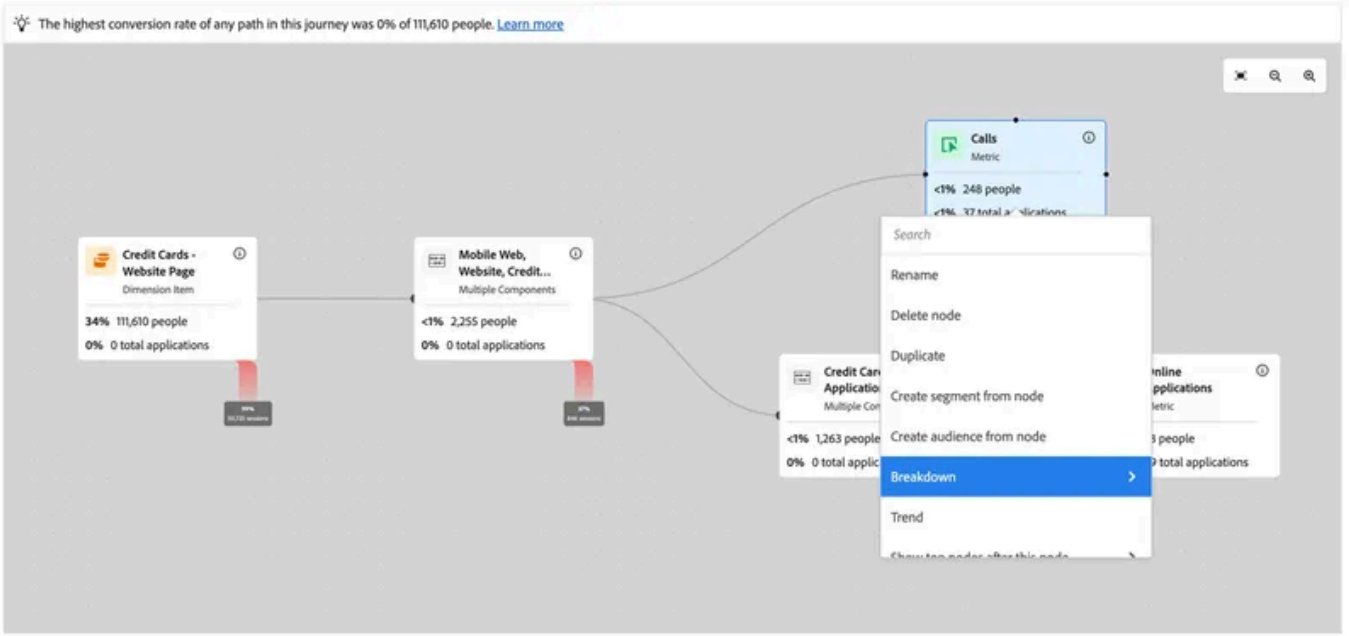
Let's add to the journey to see the number of people who make a call to the call center after starting the application process. Search for **Calls** in the components menu and drag the **Calls** metric onto journey canvas.



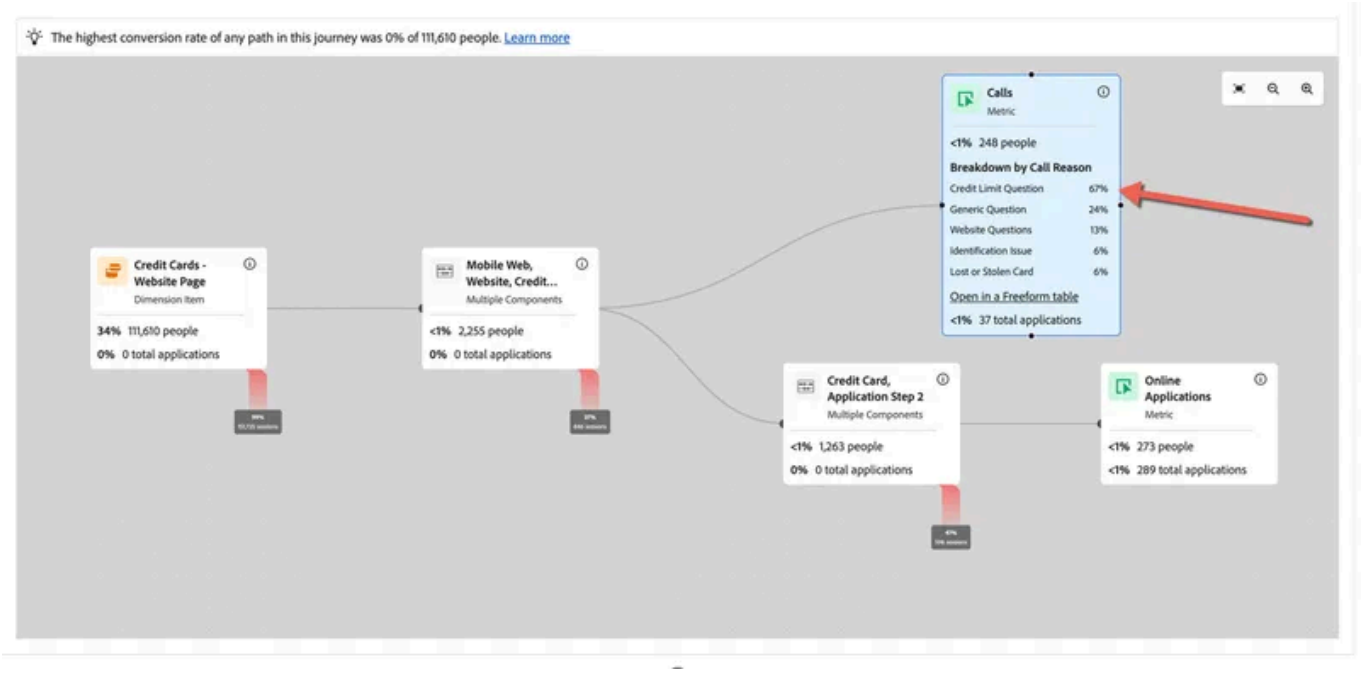
Now drag a connector from Credit Card Application Step 1 node to the Calls metric node.



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.

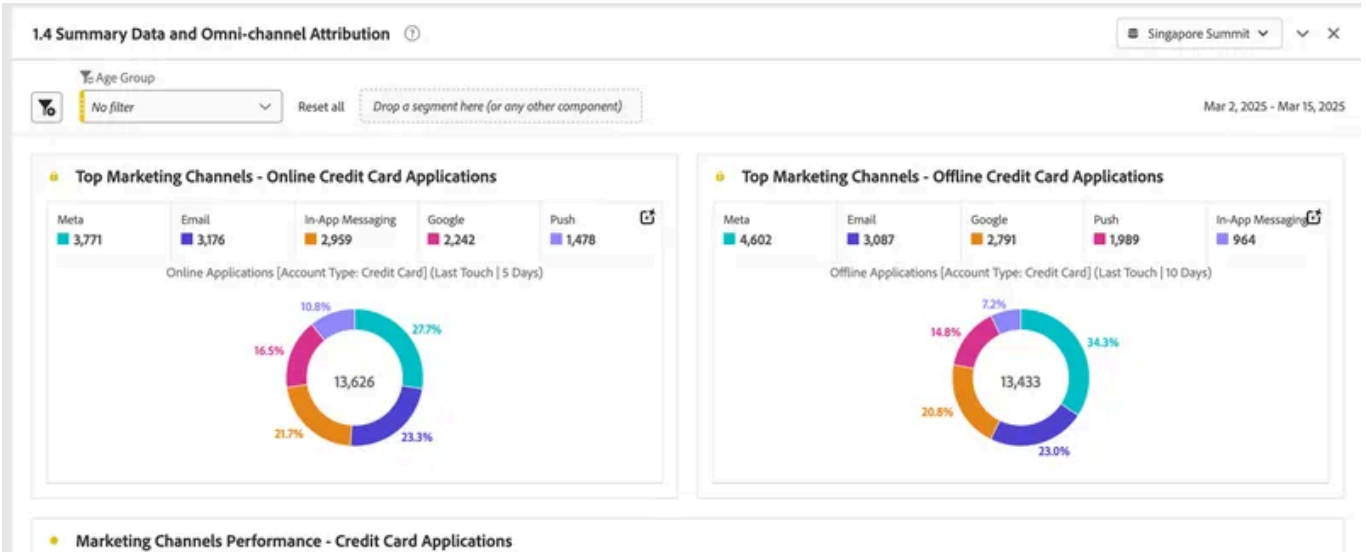
Insights Unlocked!

- 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

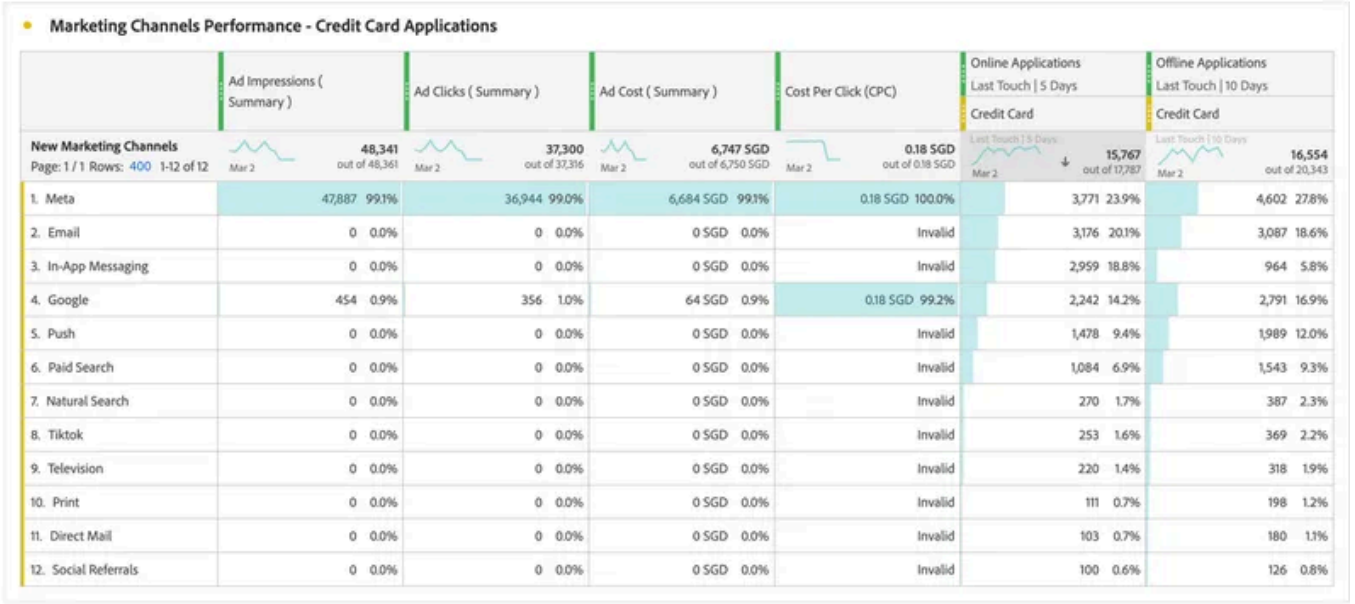
Let's take a quick look now at the marketing channels which have had the most impact historically on Credit Card Applications to provide insight on where we should focus our upcoming marketing effort and budget.

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.

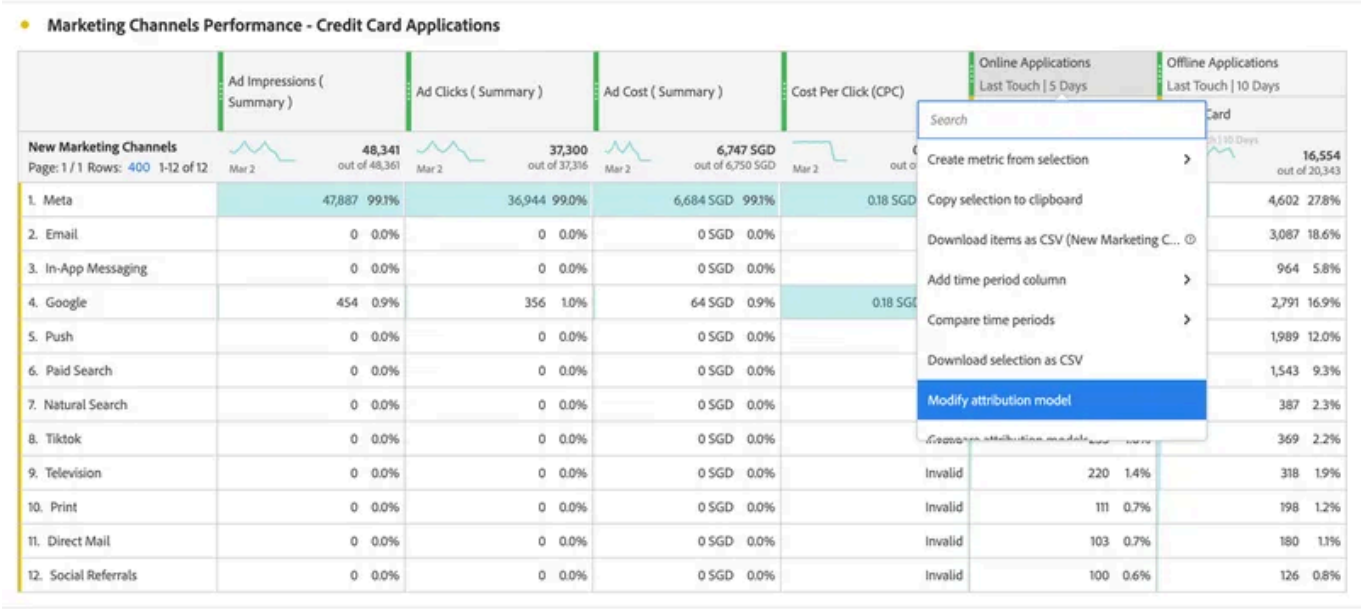


Marketing Channels Performance - Credit Card Applications

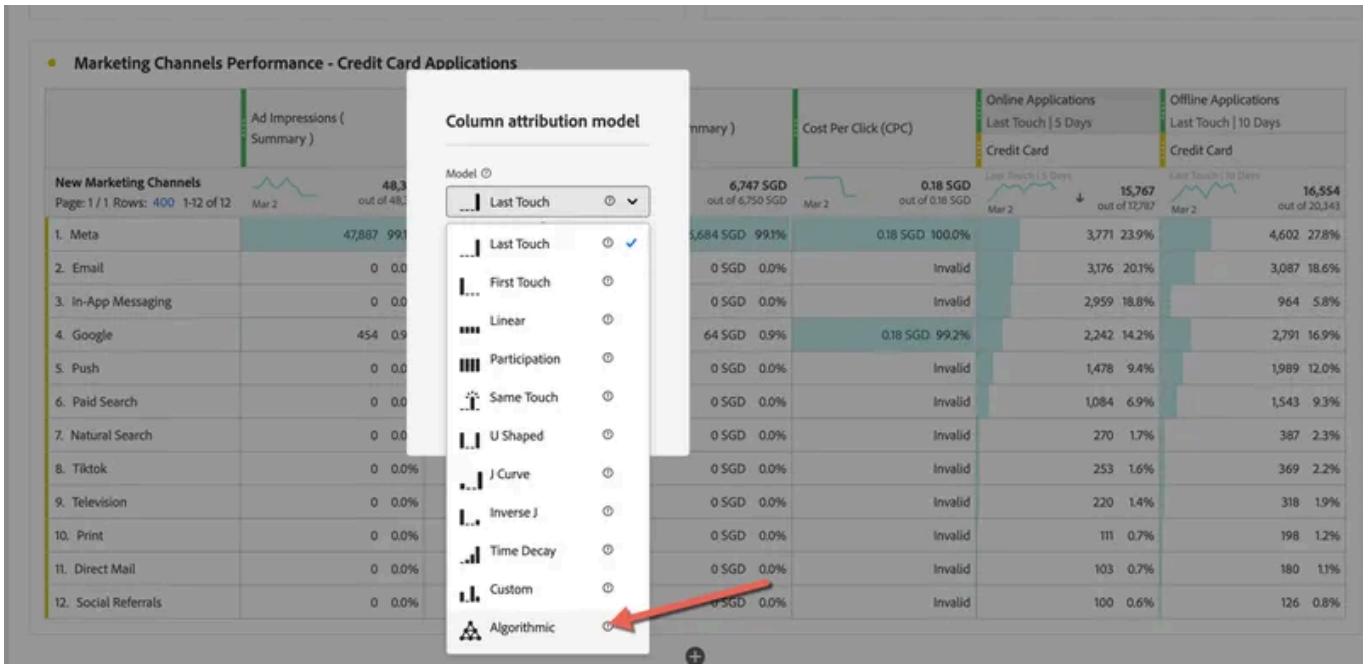
	Ad Impressions (Summary)	Ad Clicks (Summary)	Ad Cost (Summary)	Cost Per Click (CPC)	Online Applications Last Touch | 5 Days Credit Card	Offline Applications Last Touch | 10 Days Credit Card
New Marketing Channels Page: 1 / 1 Rows: 400 1-12 of 12	48,341 out of 48,361	37,300 out of 37,316	6,747 SGD out of 6,750 SGD	0.18 SGD out of 0.18 SGD	15,767 out of 17,787	16,554 out of 20,343
1. Meta	47,887 99.1%	36,944 99.0%	6,684 SGD 99.1%	0.18 SGD 100.0%	3,771 23.9%	4,602 27.8%
2. Email	0 0.0%	0 0.0%	0 SGD 0.0%	Invalid	3,176 20.1%	3,087 18.6%
3. In-App Messaging	0 0.0%	0 0.0%	0 SGD 0.0%	Invalid	2,959 18.8%	964 5.8%
4. Google	454 0.9%	356 1.0%	64 SGD 0.9%	0.18 SGD 99.2%	2,242 14.2%	2,791 16.9%
5. Push	0 0.0%	0 0.0%	0 SGD 0.0%	Invalid	1,478 9.4%	1,989 12.0%
6. Paid Search	0 0.0%	0 0.0%	0 SGD 0.0%	Invalid	1,084 6.9%	1,543 9.3%
7. Natural Search	0 0.0%	0 0.0%	0 SGD 0.0%	Invalid	270 1.7%	387 2.3%
8. Tiktok	0 0.0%	0 0.0%	0 SGD 0.0%	Invalid	253 1.6%	369 2.2%
9. Television	0 0.0%	0 0.0%	0 SGD 0.0%	Invalid	220 1.4%	318 1.9%
10. Print	0 0.0%	0 0.0%	0 SGD 0.0%	Invalid	111 0.7%	198 1.2%
11. Direct Mail	0 0.0%	0 0.0%	0 SGD 0.0%	Invalid	103 0.7%	180 1.1%
12. Social Referrals	0 0.0%	0 0.0%	0 SGD 0.0%	Invalid	100 0.6%	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.



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.



Insights Unlocked!

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

3.5 Data Insights Agent

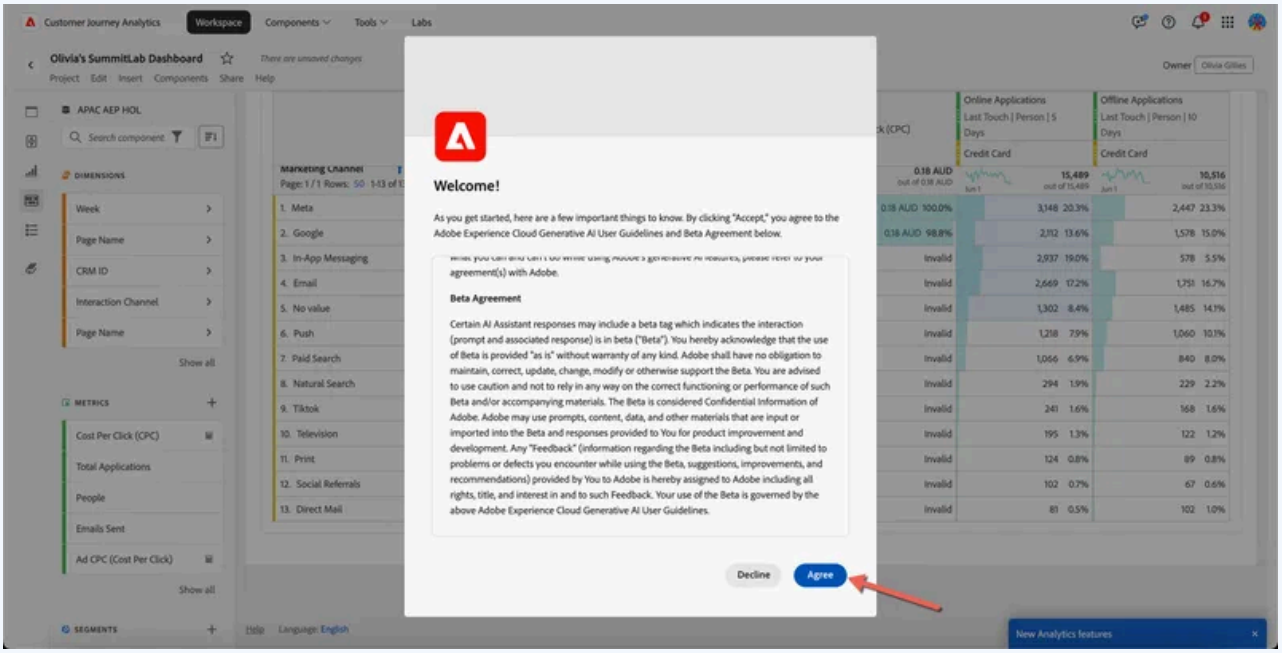
We've seen so far how Data Analysts can use Customer Journey Analytics to quickly answer business questions but what about when an Analyst isn't available?

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

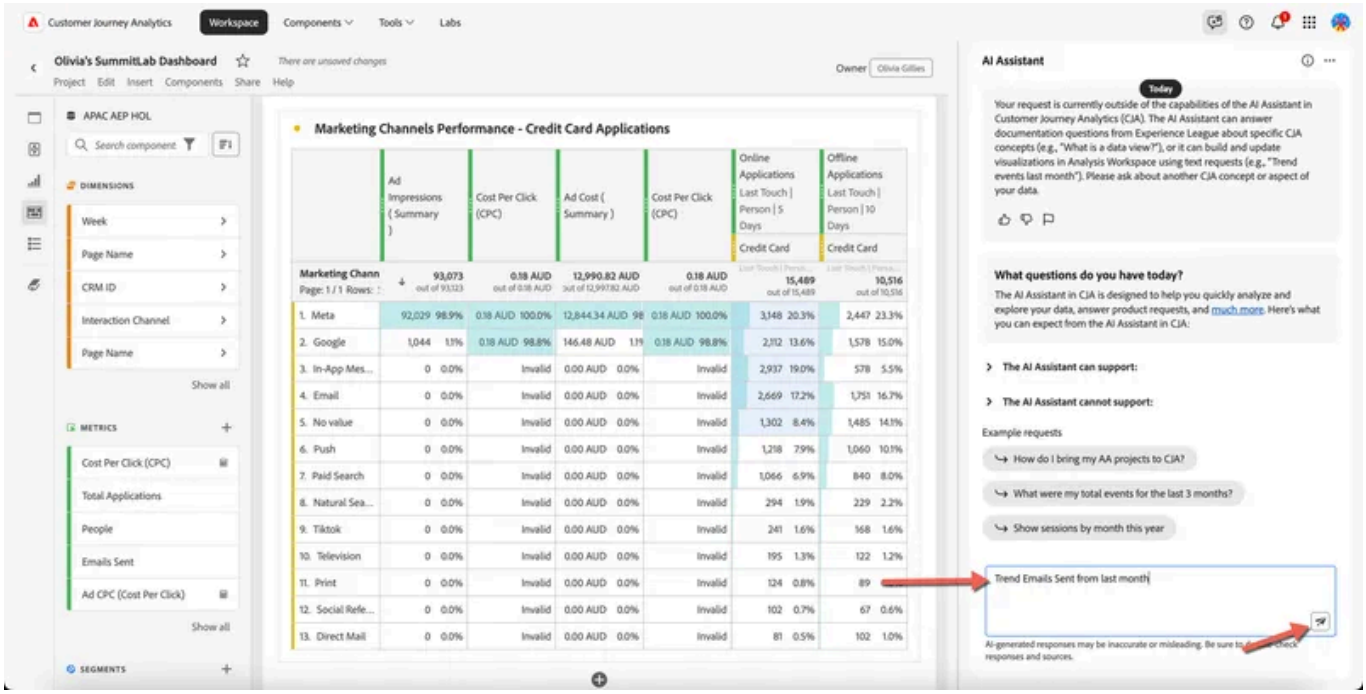
Open the AI Assistant by clicking the icon in the top right.



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



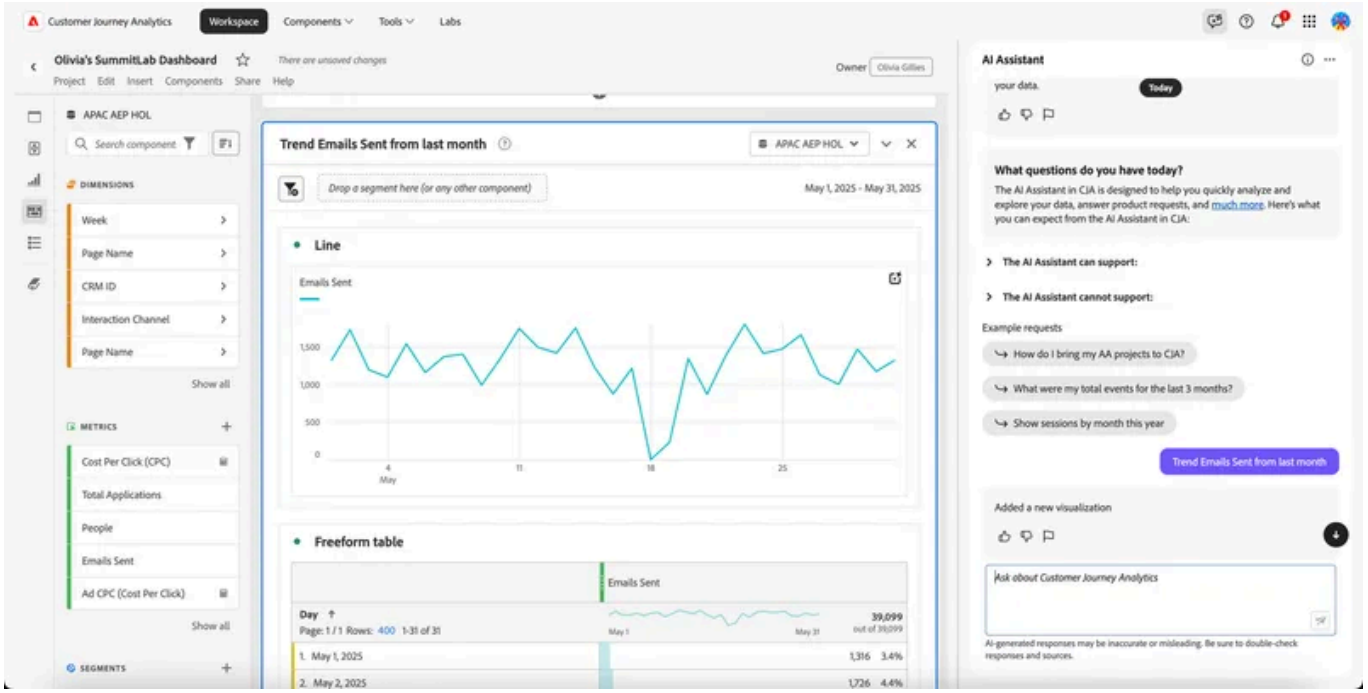
Ask AI Assistant to "**Trend Emails Sent from the last month**".



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

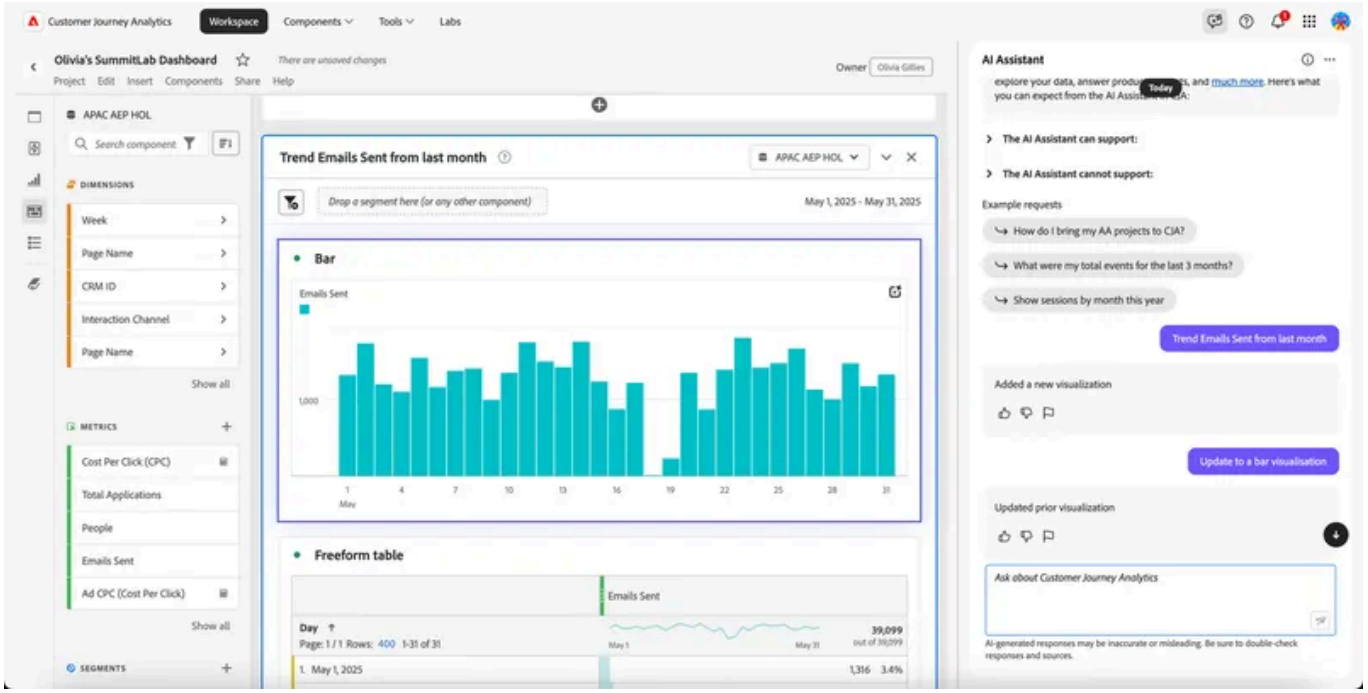
dimension, metric, and date range for this analysis.

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.

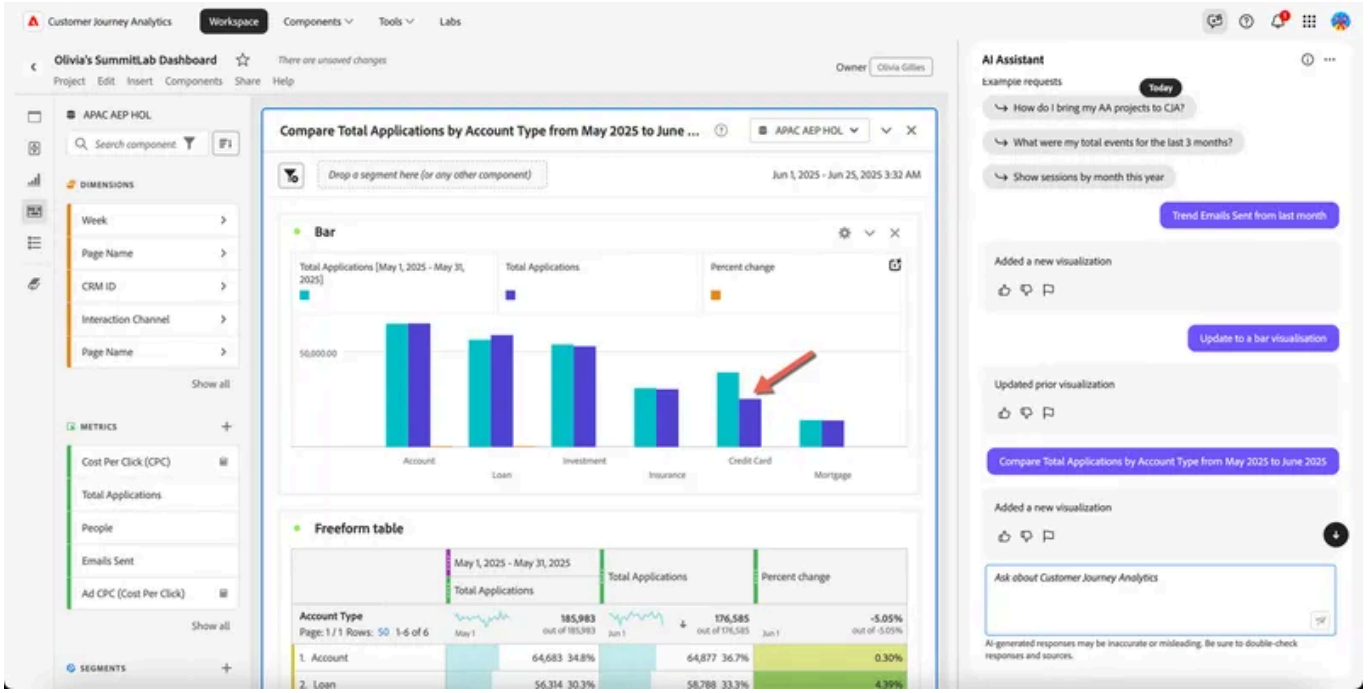


You can ask it to update the metrics or visualisation if it's not what you were after.

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!

5. Lab 4 - Federated Audiences

Learning Objectives

In this exercise you will learn how to create a federated audience composition and save the results of your composition as an audience in Adobe Experience Platform.

Scenario

SecurFinancial are a leading retail bank offering personal banking services across a range of loans, credit cards and insurance products. They have successfully implemented Adobe Experience Platform Real-Time CDP and are actively using it to build and activate audiences. However, as the bank scales its personalisation efforts, it encounters a new challenge: **some critical customer data remains in external systems** due to regulatory, operational, or architectural constraints.

To address this, SecurFinancial has adopted **Federated Audience Composition.**

Why SecurFinancial Chose Federated Audience Composition:

1. **Data Residency & Compliance:**
   Certain customer data (e.g., credit scores, risk profiles, or sensitive financial indicators) must remain in on-prem or third-party systems due to compliance with financial regulations.
2. **Operational Efficiency:**
   Moving large volumes of data into AEP for segmentation was time-consuming and costly. Federated composition allows the bank to **query external data sources** without ingesting them into AEP.
3. **Faster Time-to-Market:**
   Marketing teams can now build audiences that include external attributes without waiting for data ingestion pipelines to complete.
4. **Unified Segmentation Strategy:**
   Enables the creation of **hybrid audiences** that combine real-time CDP data with external data sources like core banking systems, CRM, or risk engines.

Lab Use Case: High-Value Credit Card Upsell

Objective:
Target customers who are eligible for a premium credit card based on financial criteria.

Federated Audience Criteria:

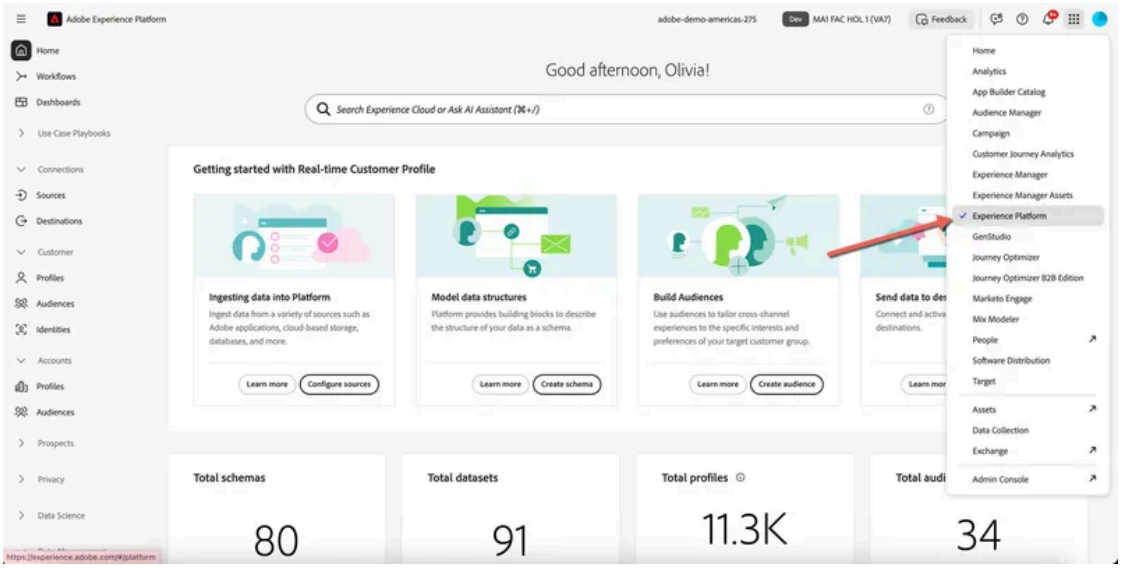
- Credit score above 661.
- Household income over $200,000.
- No failed payments in the last 12 months.

Activation Channels:

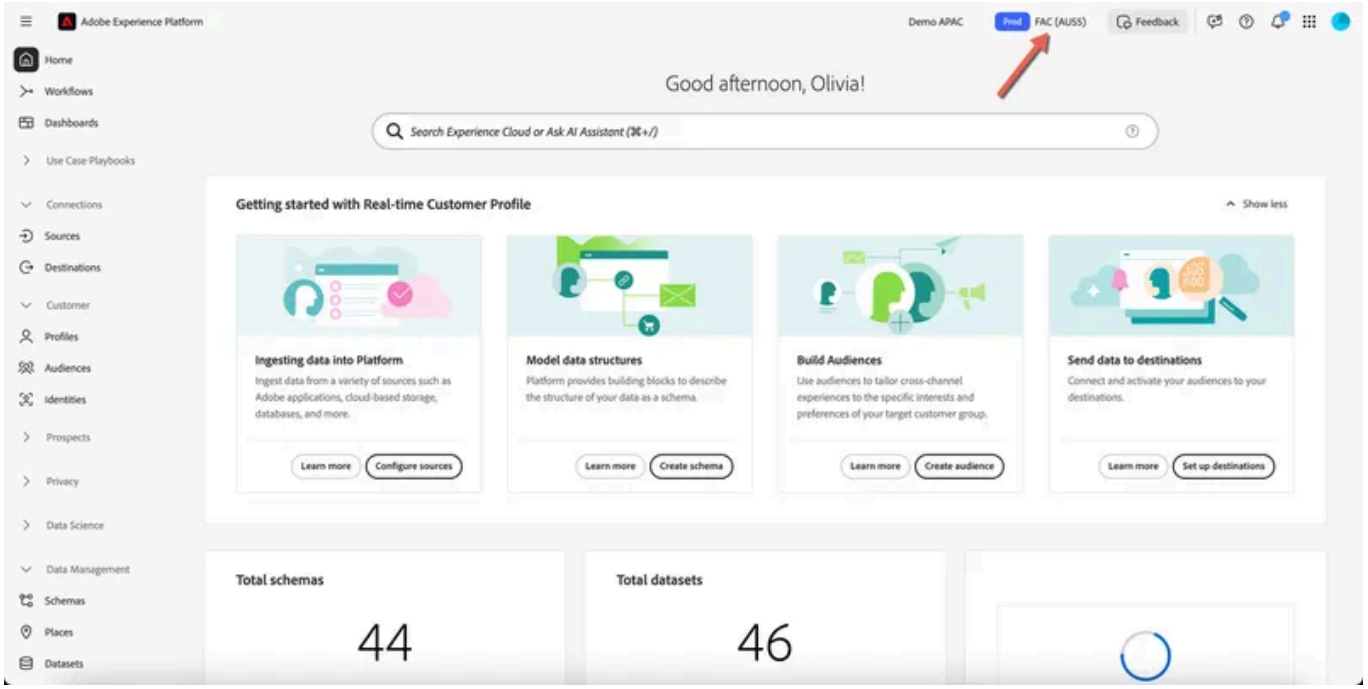
- Personalised email with pre-approved offer from Adobe Journey Optimizer
- Mobile push notification with “Apply Now” CTA via Adobe Journey Optimizer
- Web personalisation on login dashboard via Adobe Target

Access

Switch from Customer Journey Analytics to **Adobe Experience Platform** using the solution switcher.

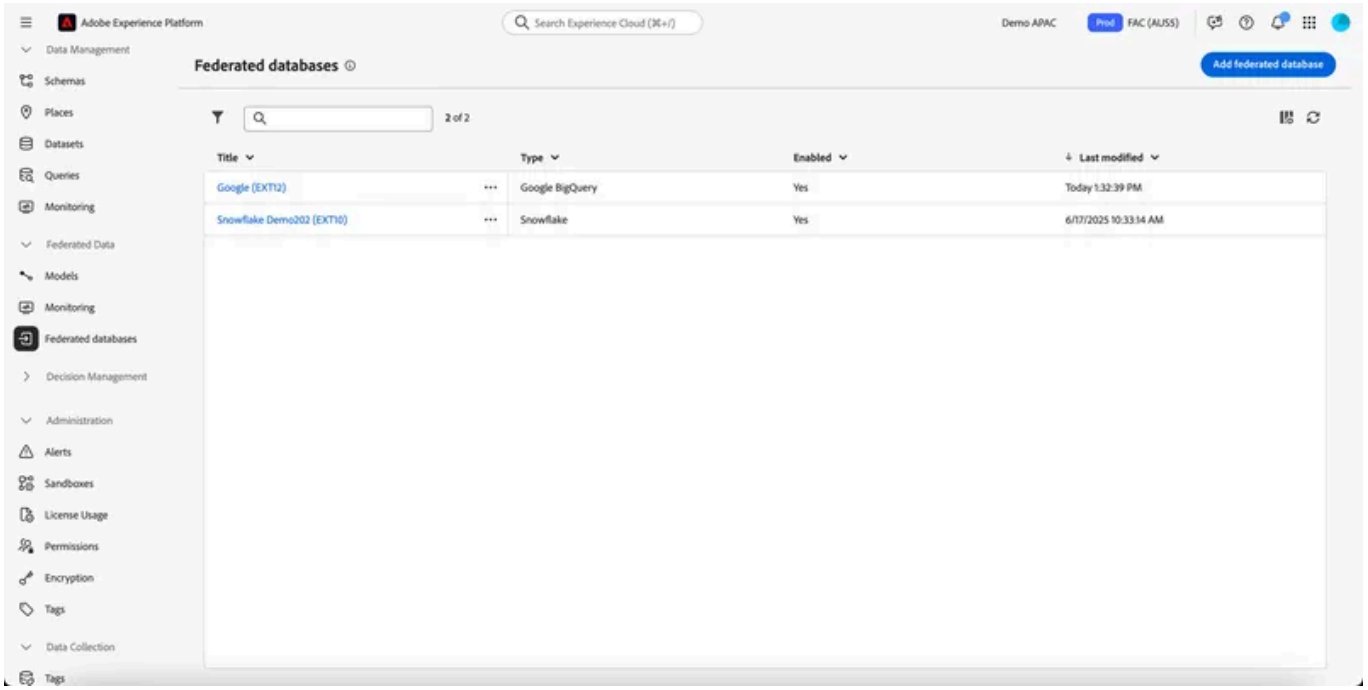


Once loaded, confirm that you are in the right sandbox - it should be **FAC (AUS5)**

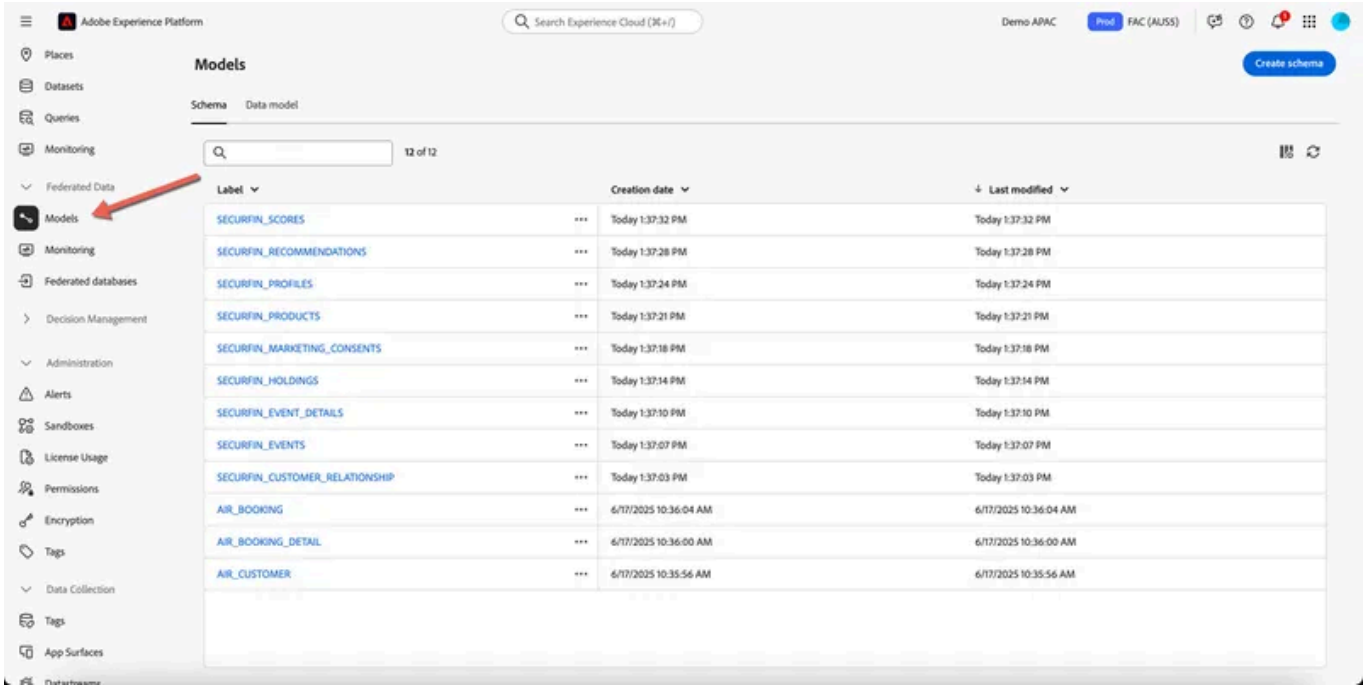


4.1 View the Connection and Mapping

For this exercise the connection to our Snowflake data warehouse has already been established. You can view the connection by navigating to **Federated Data → Federated Databases:**



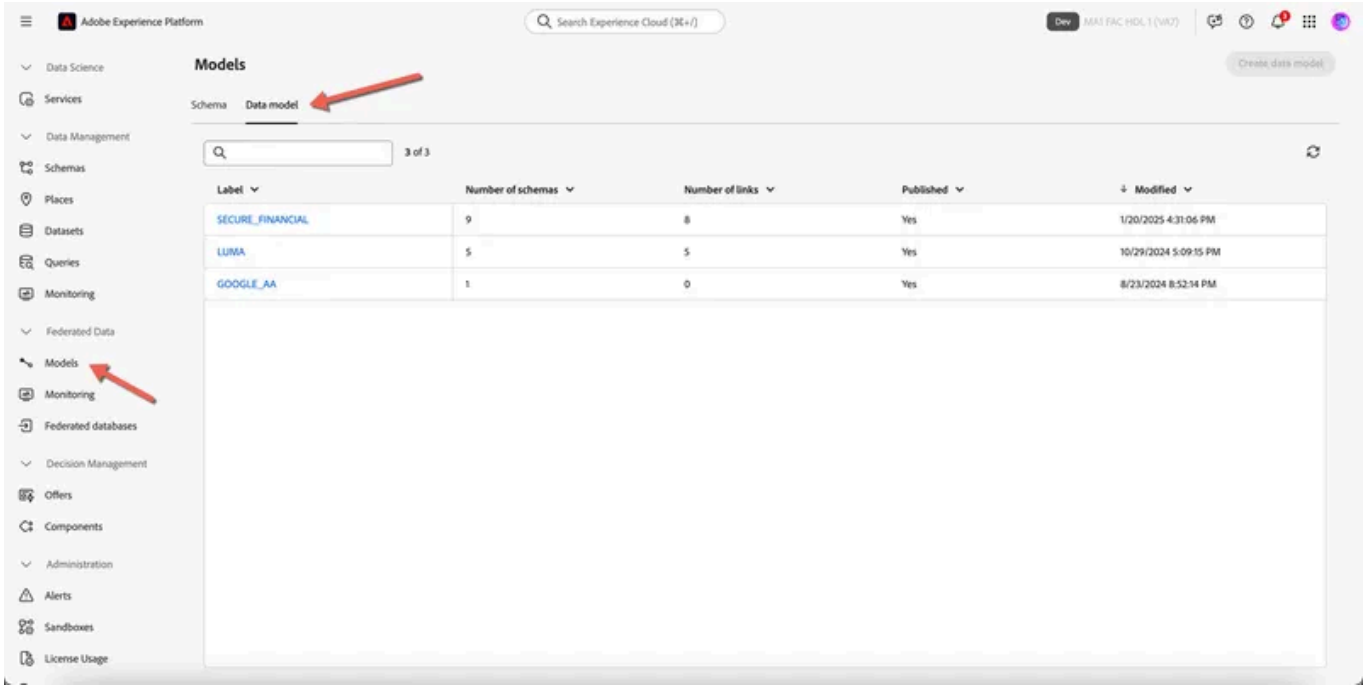
After establishing the connection, we need to map the tables and fields that will be available to AEP users to query. Click on the **Models** menu item under **Federated Data.**



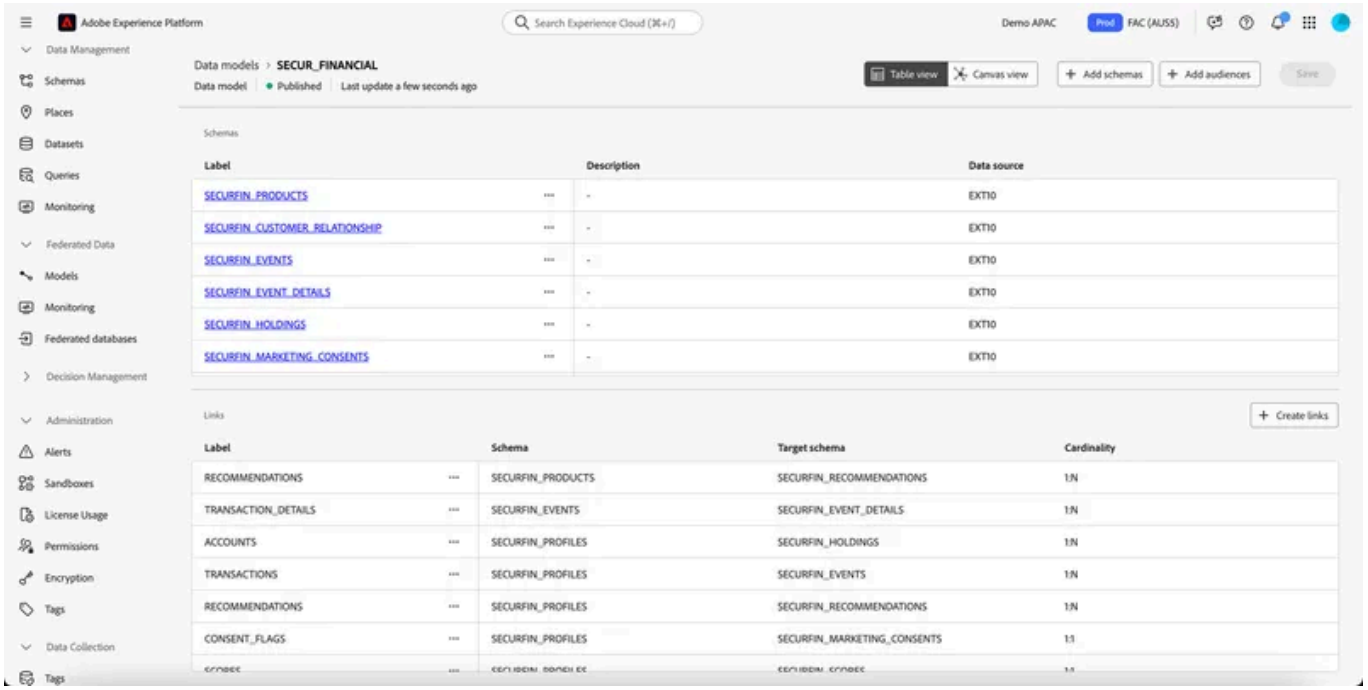
Each schema outlines a table in the data warehouse along with the fields that are visible to AEP users. Click on **SECURFIN_PROFILES** to view the mapping. Columns can be hidden from view if desired by editing the schema description. The schema is generated automatically after selecting the table through the connection - updates to the source schema can also be automatically retrieved when needed.

> You have read only access so you won't see the edit options shown in the image below.

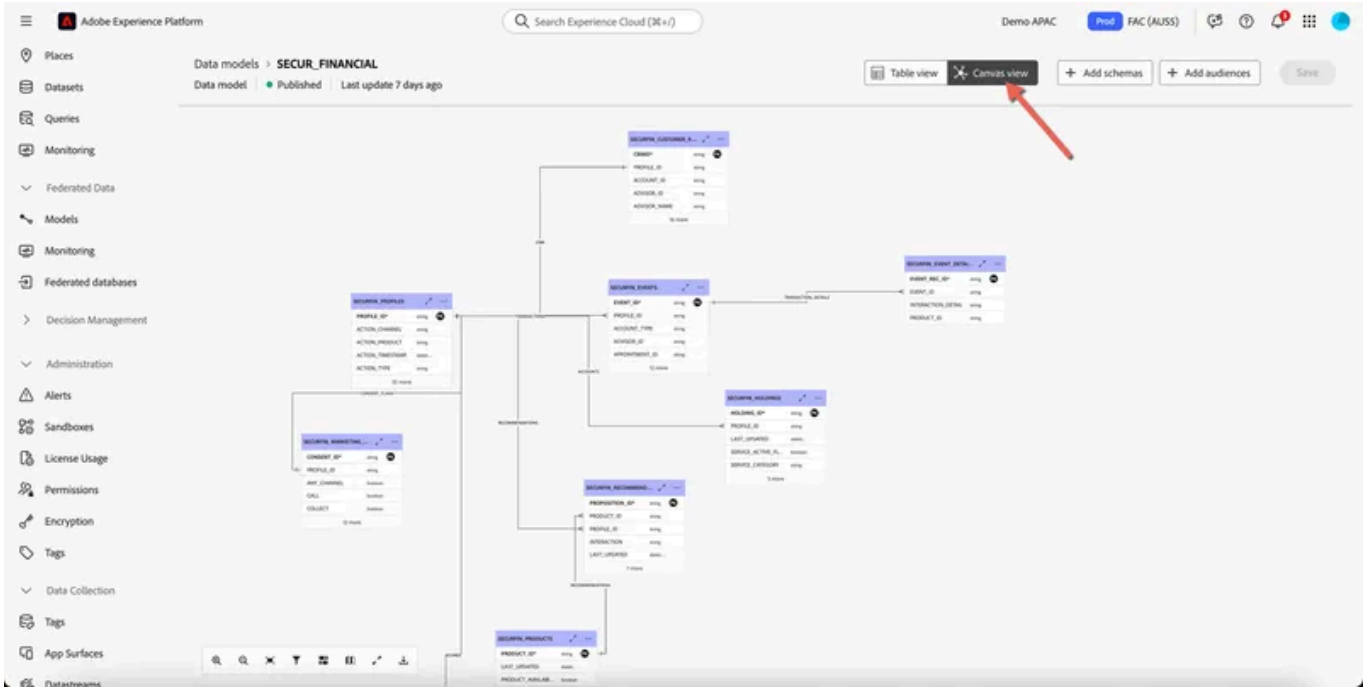
Once the tables are mapped, we need to define how they relate to each other. Return to Models and open the **Data model** tab.



Here schemas are grouped into data models. Click to open the **SECURE_FINANCIAL** data model. Here you can see the schemas that are included and the links that have been defined between them, for example records in SECURFIN_PROFILES are linked to one or more (1:N) SECUREFIN_ACCOUNTS - we will use these link definitions in our composition to easily join tables and change the query from reading one table to another.



Click on the **Canvas View** to show an ER diagram view of the mapped data model.



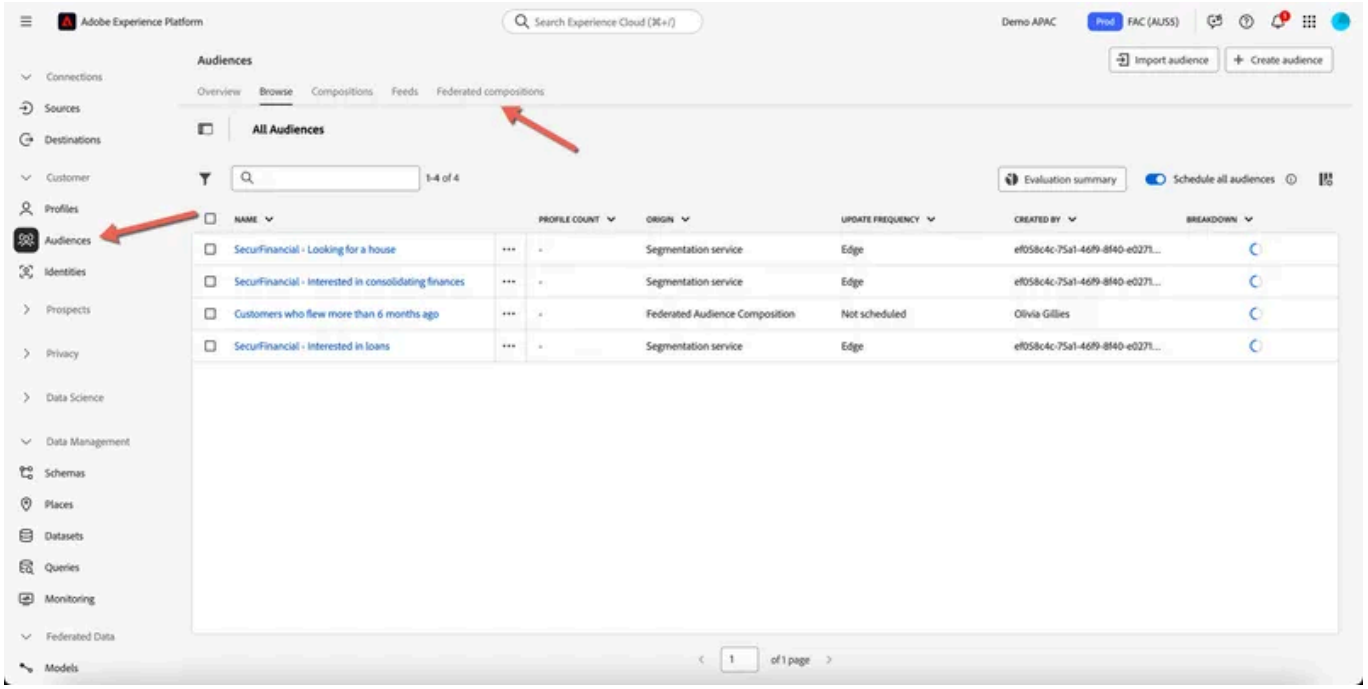
4.2 Create a federated audience

Using federated audience composition we can ask Snowflake to run queries and transfer to Adobe only the resulting list of customer id's. Keeping sensitive data secure and minimising duplication across systems.

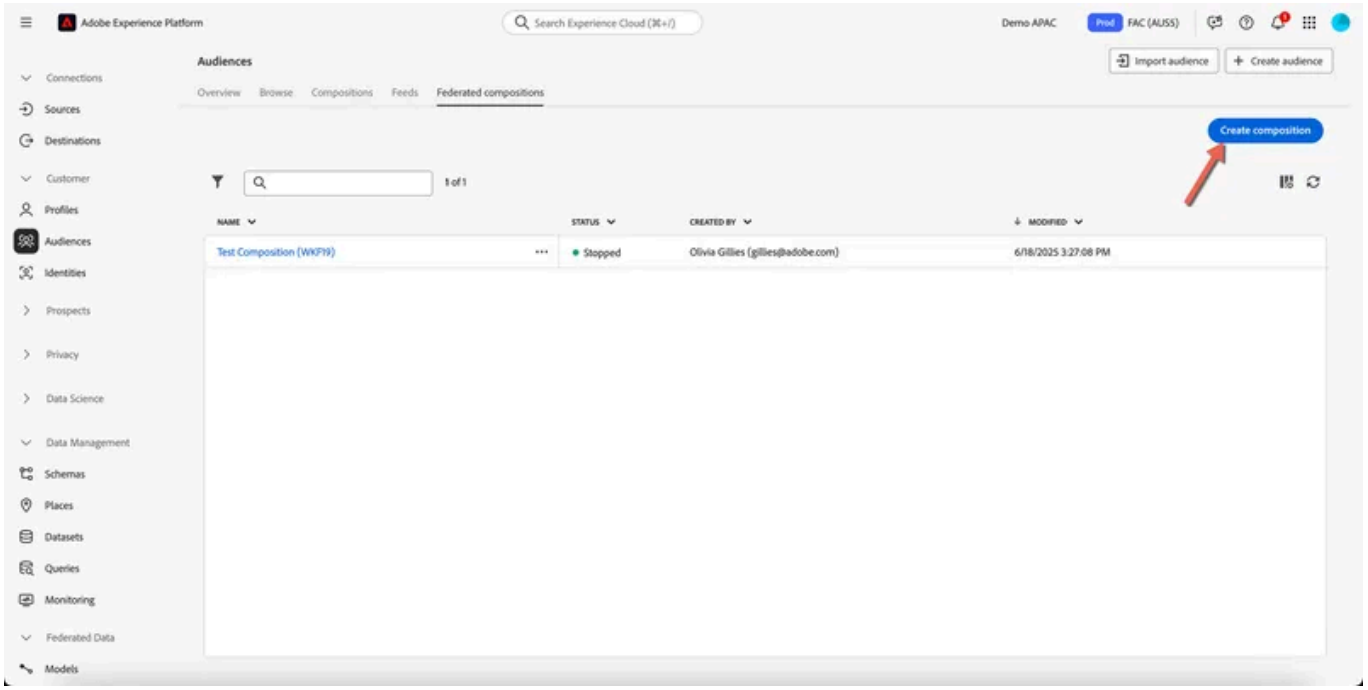
We build the query (or series of queries) that will run in Snowflake through what we call a **federated composition.**

For this exercise, we will create a single query joining profiles and transactions in snowflake to understand customers with a credit score over 661 who have not had any failed payments in the last 12 months. We'll execute that query in snowflake and return to Adobe a list of CRM Id's only.

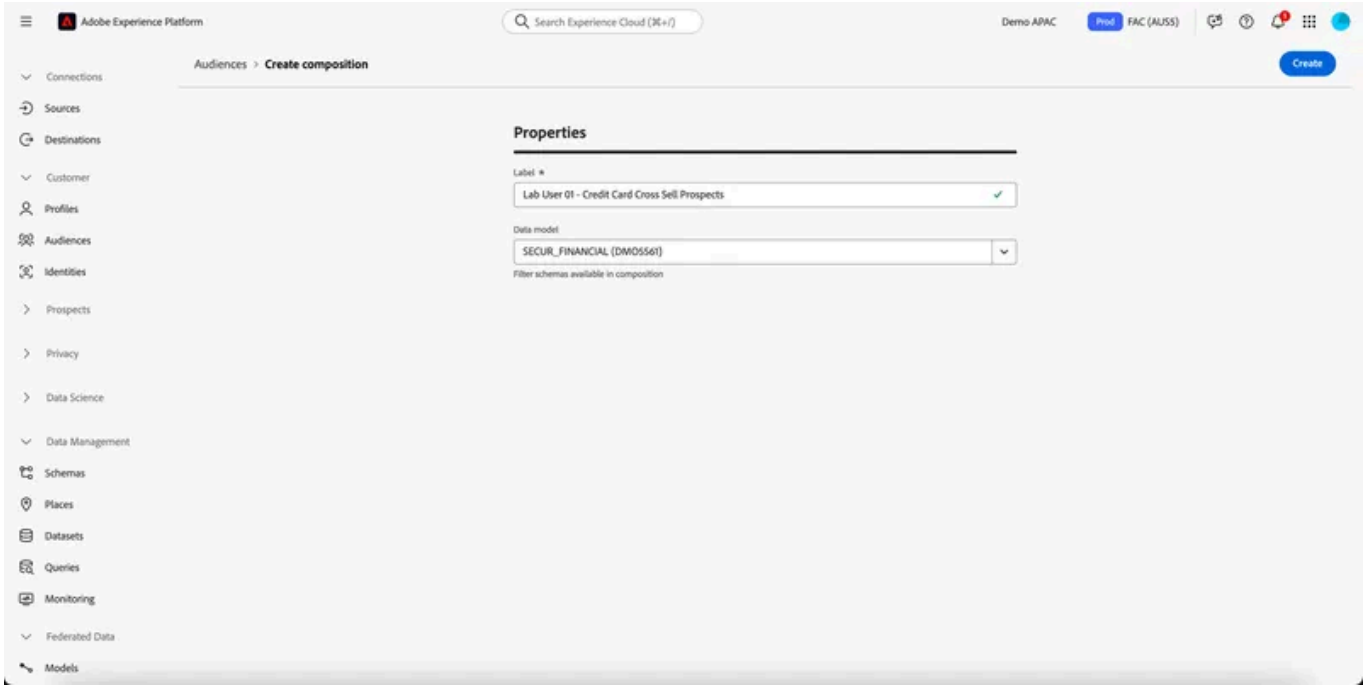
From the audience portal click to the **Federated Compositions** tab.



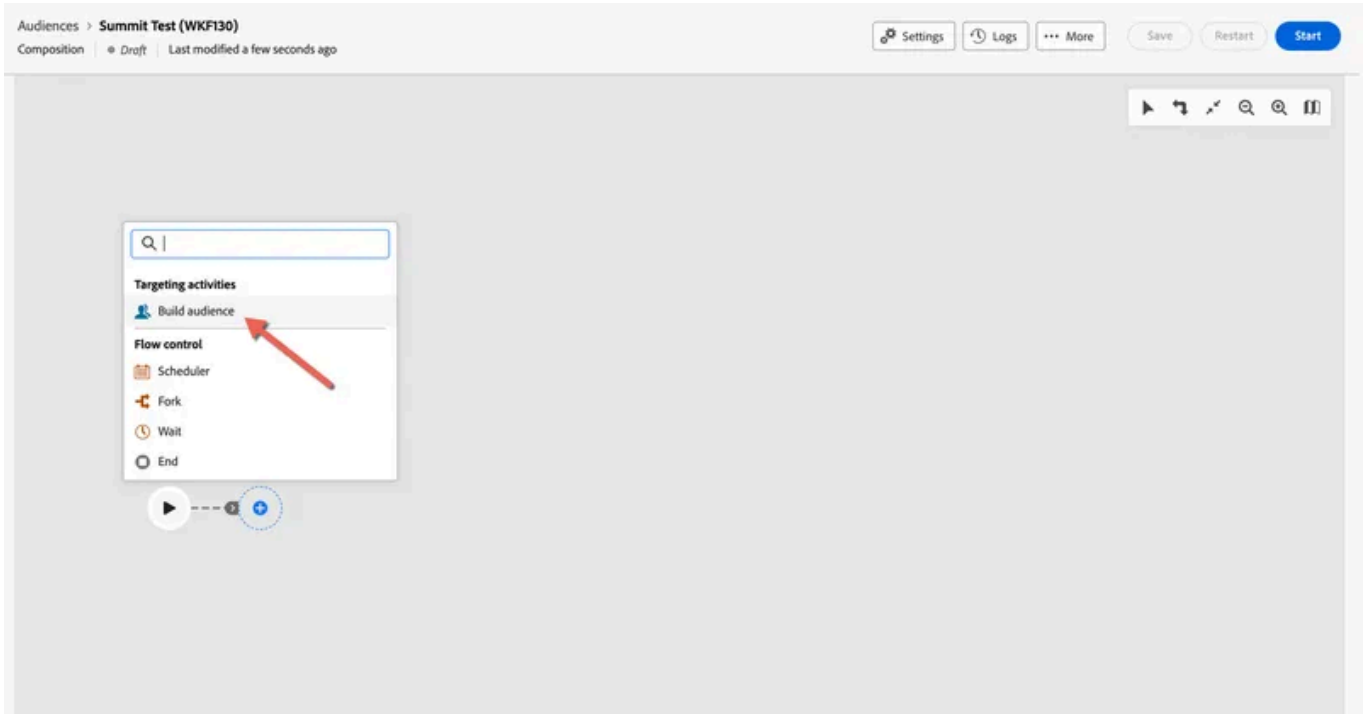
Click to **Create Composition**



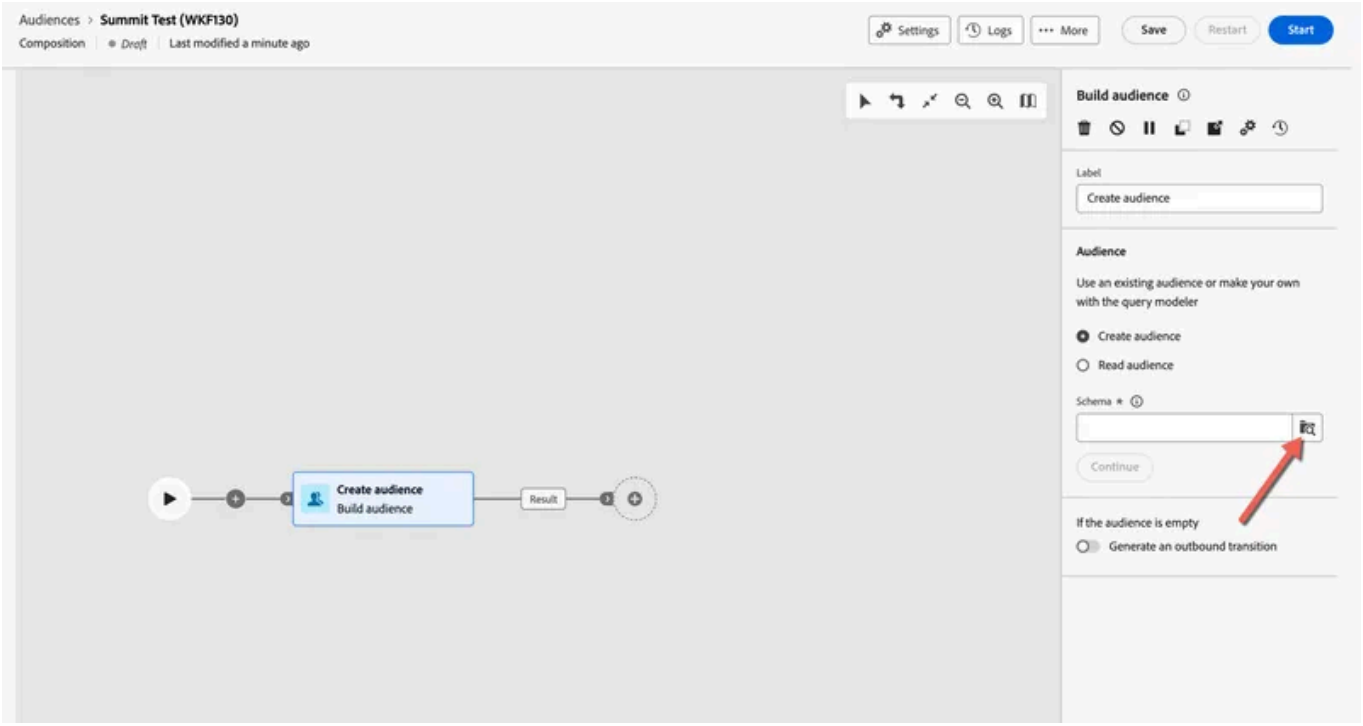
Give your composition a unique **Label** (and your name or lab number so you can recognise it again) and select the **SECUR_FINANCIAL** Data Model - this controls which federated database we connect with and which tables are accessible within that warehouse. Then click **Create.**



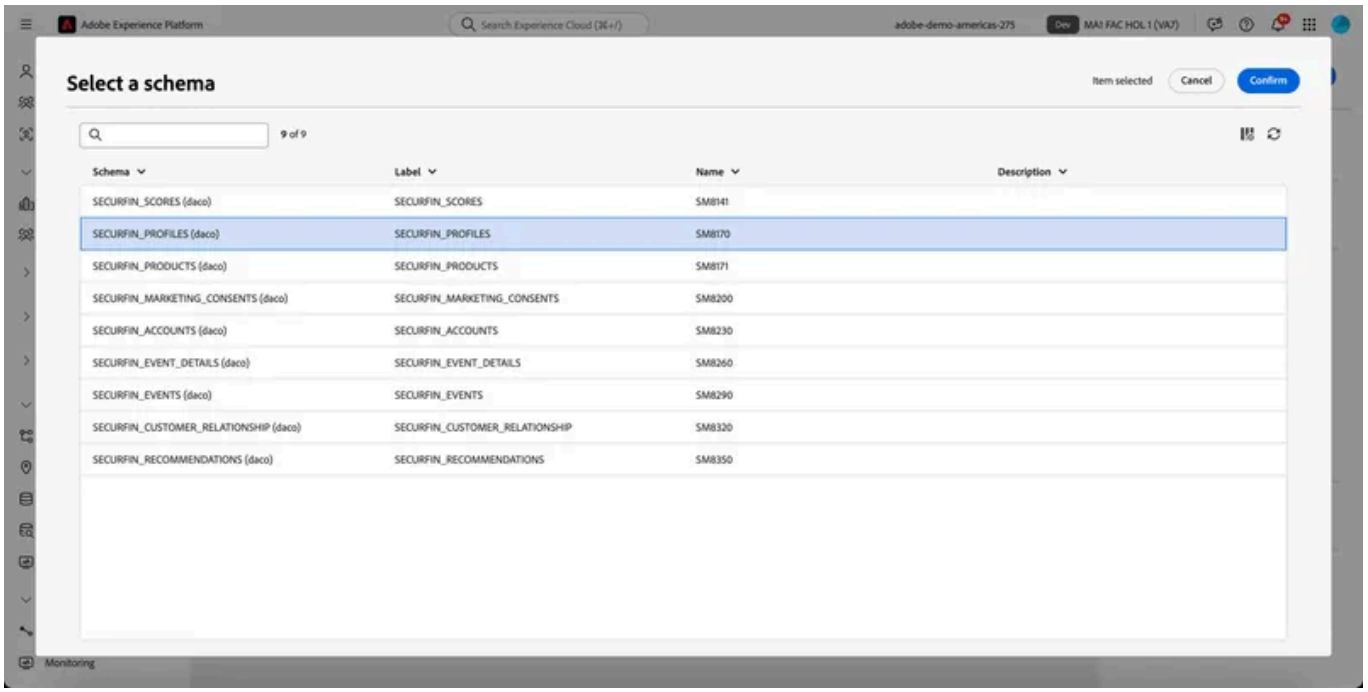
Click the plus icon in your composition and add a **Build Audience** activity.



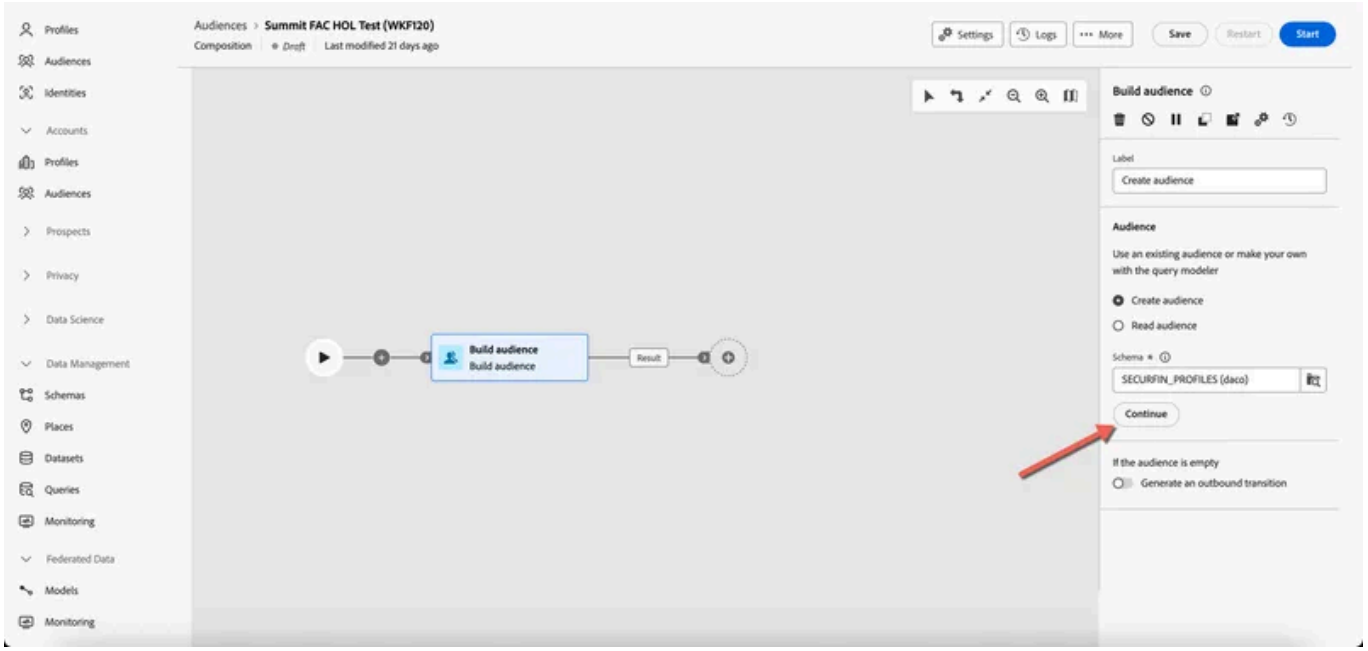
The activity properties appear on the right hand side. For the Build Audience activity we need to select the schema (ie. table) from the data warehouse that we want to query. Click on the schema field to open the list of mapped tables.



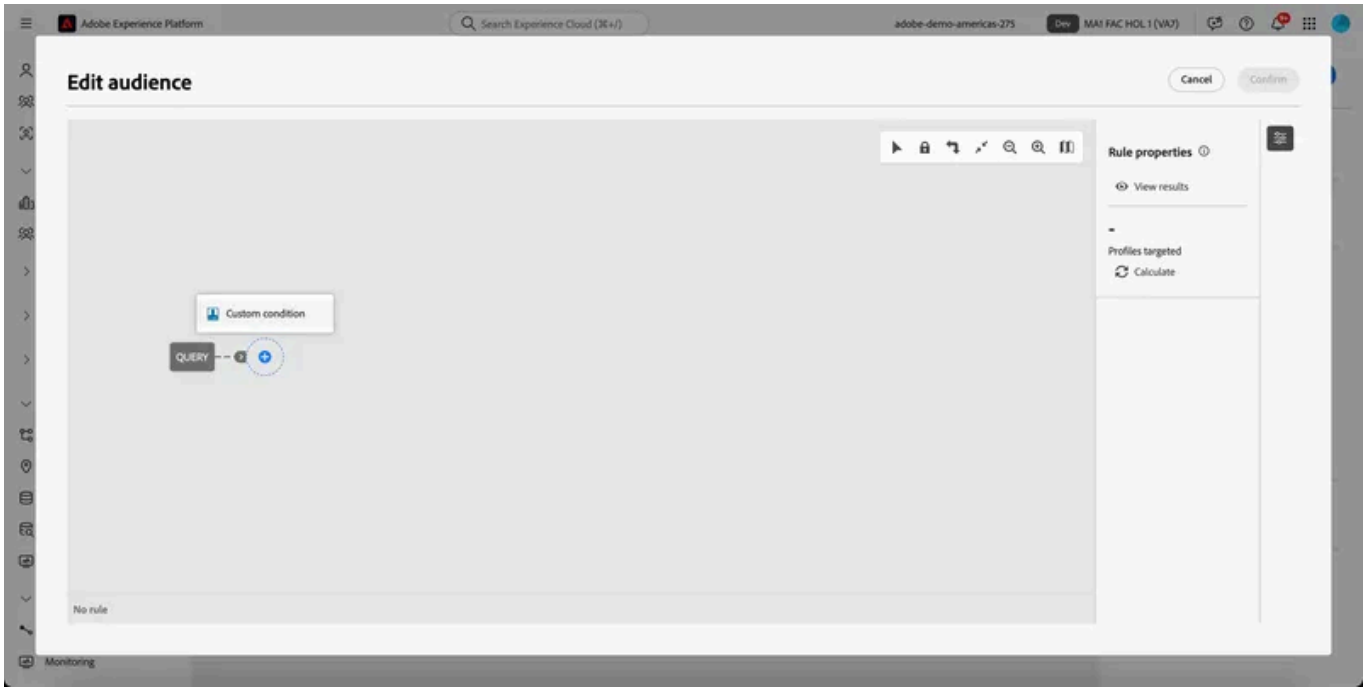
Choose the **SECUREFIN_PROFILES** schema and click **Confirm**



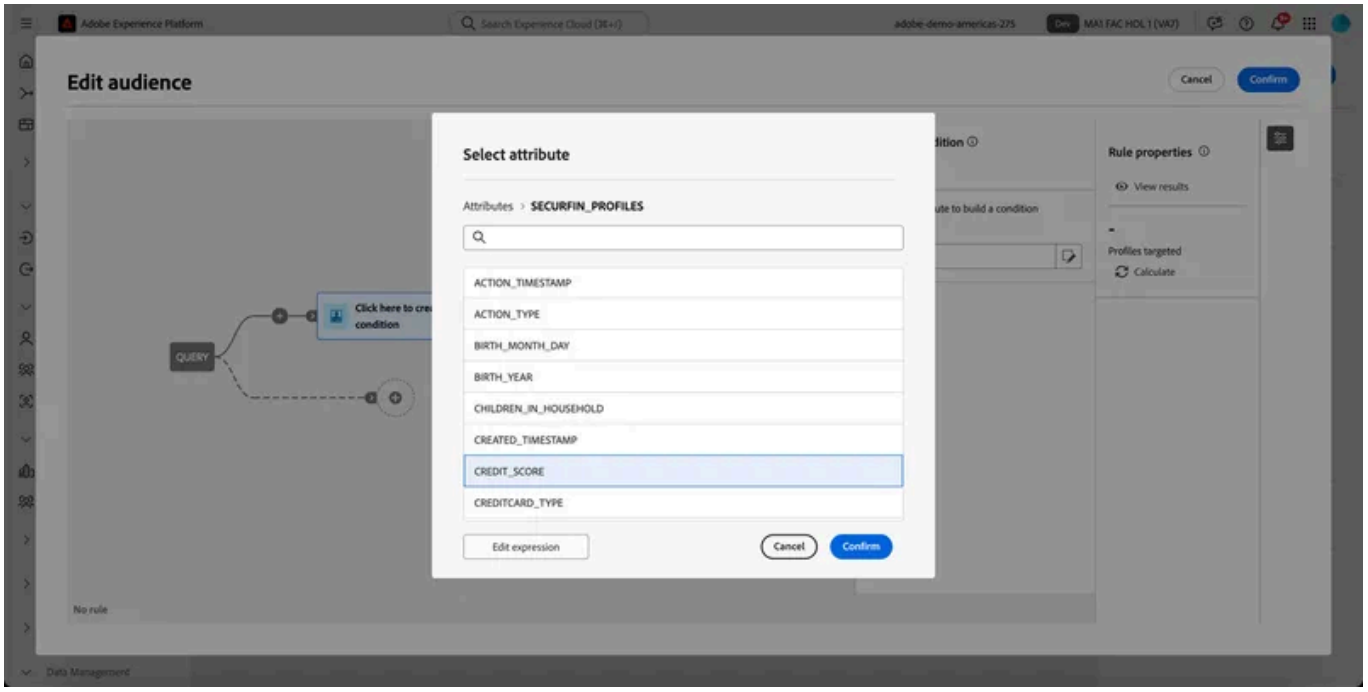
Once selected, click **Continue** to configure the query parameters.



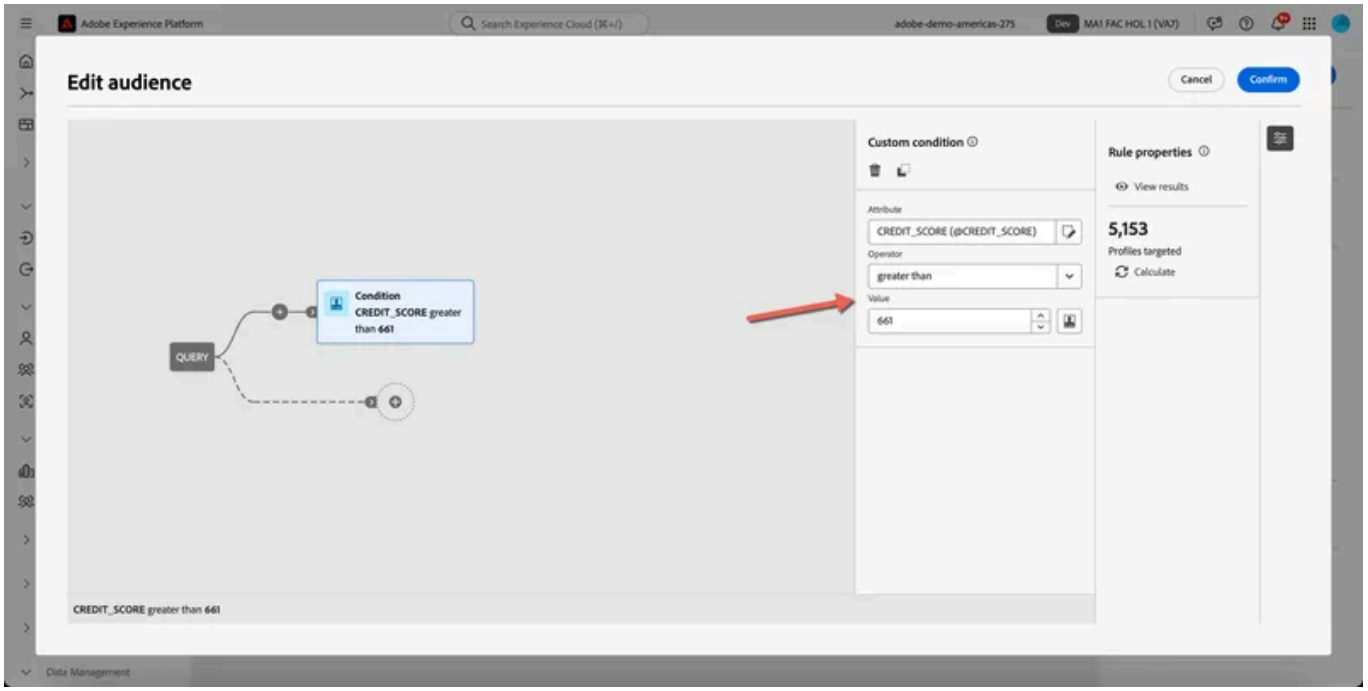
In the query builder, click the + icon to add a **custom condition.**



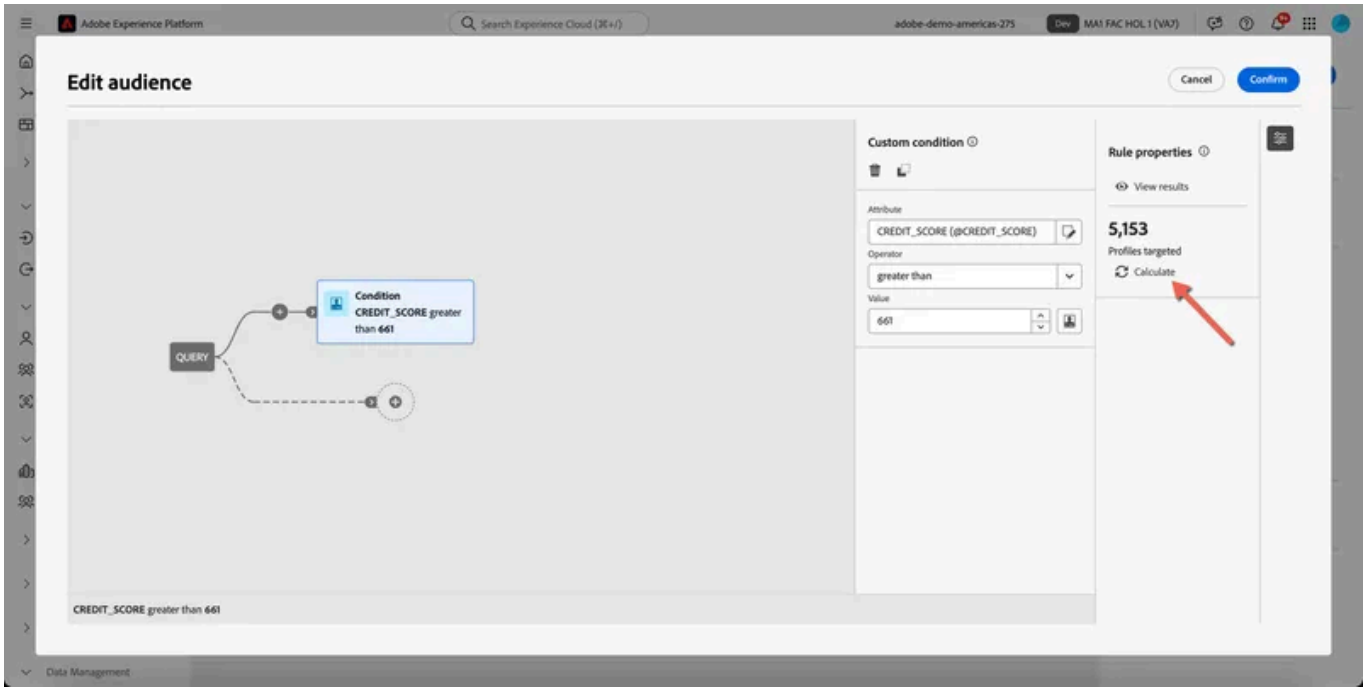
Select the **CREDIT_SCORE** attribute and click **Confirm**



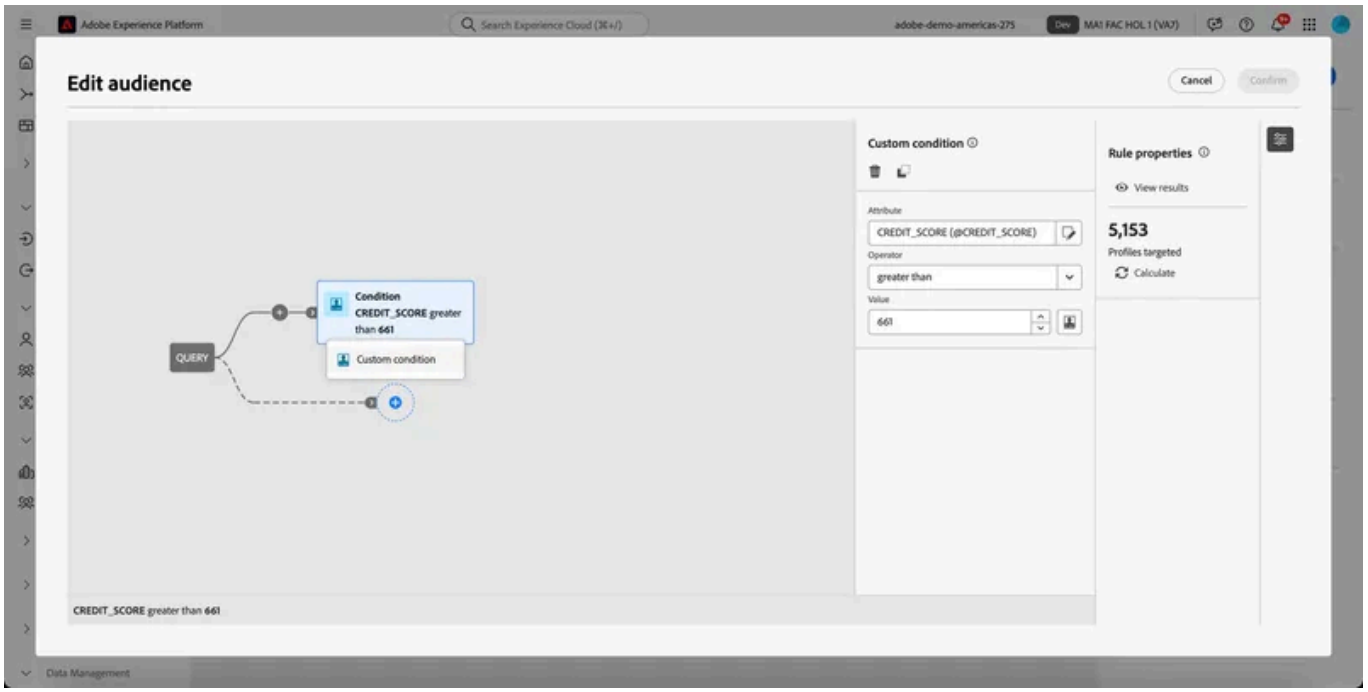
Change the operate to **greater than** and the value to **661** to find customers with a good credit score.



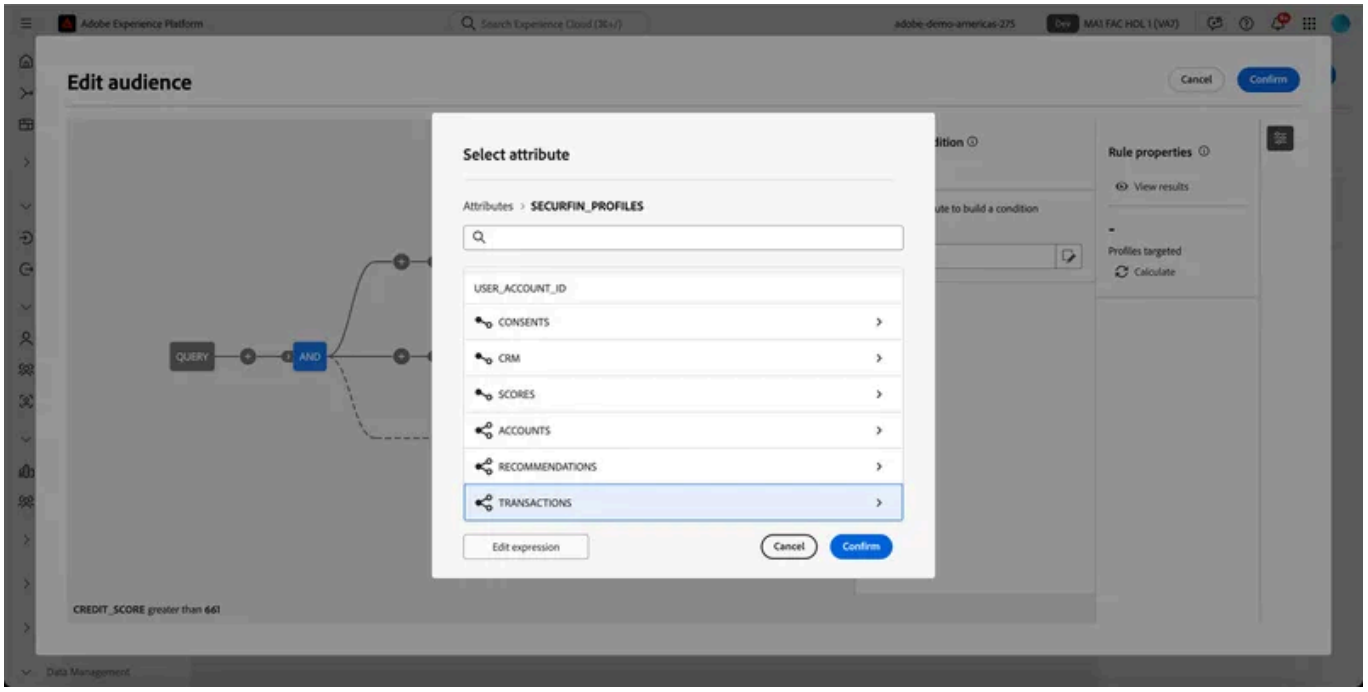
You can check the number of qualifying profiles by clicking the **calculate** button at any time.



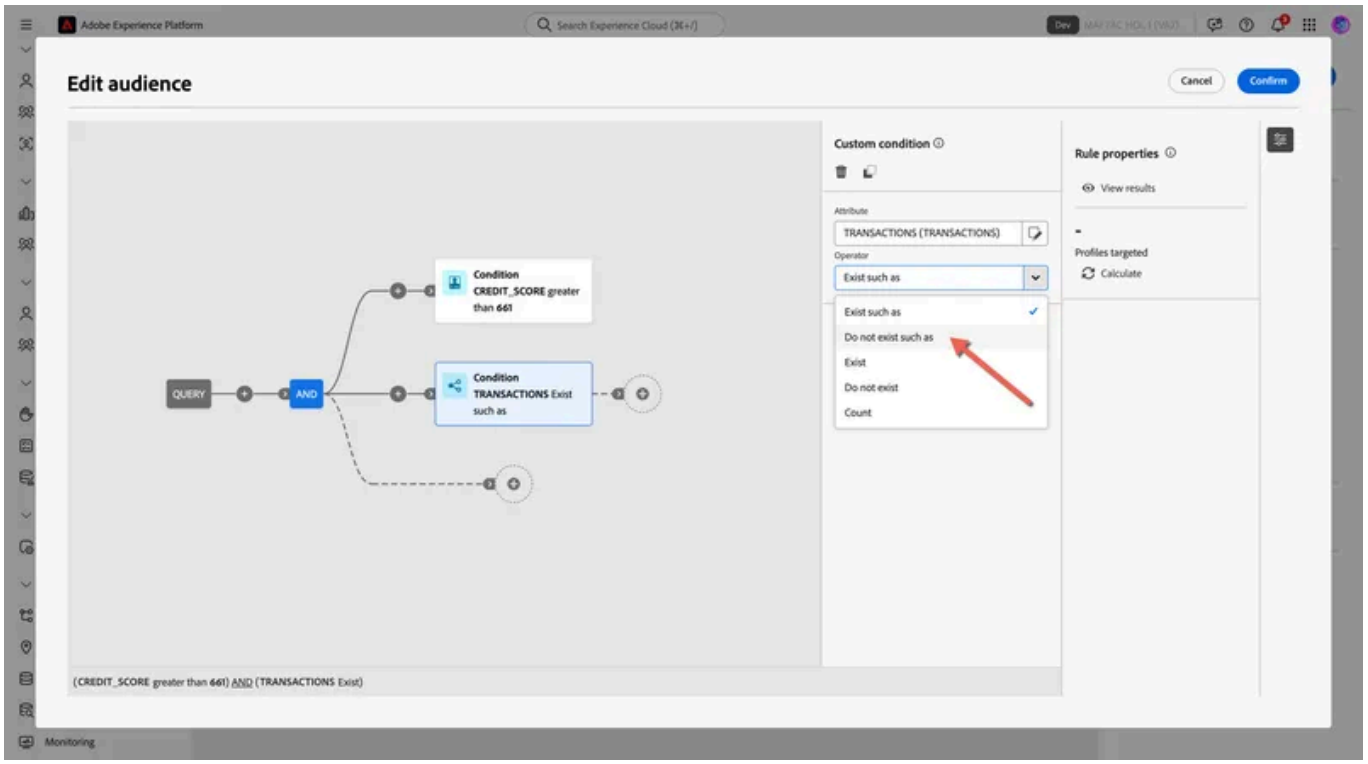
Now we want to further filter the audience to include only customers who have not had any failed payments in the last 12 months. Click the + icon on the lower branch to add another custom condition.



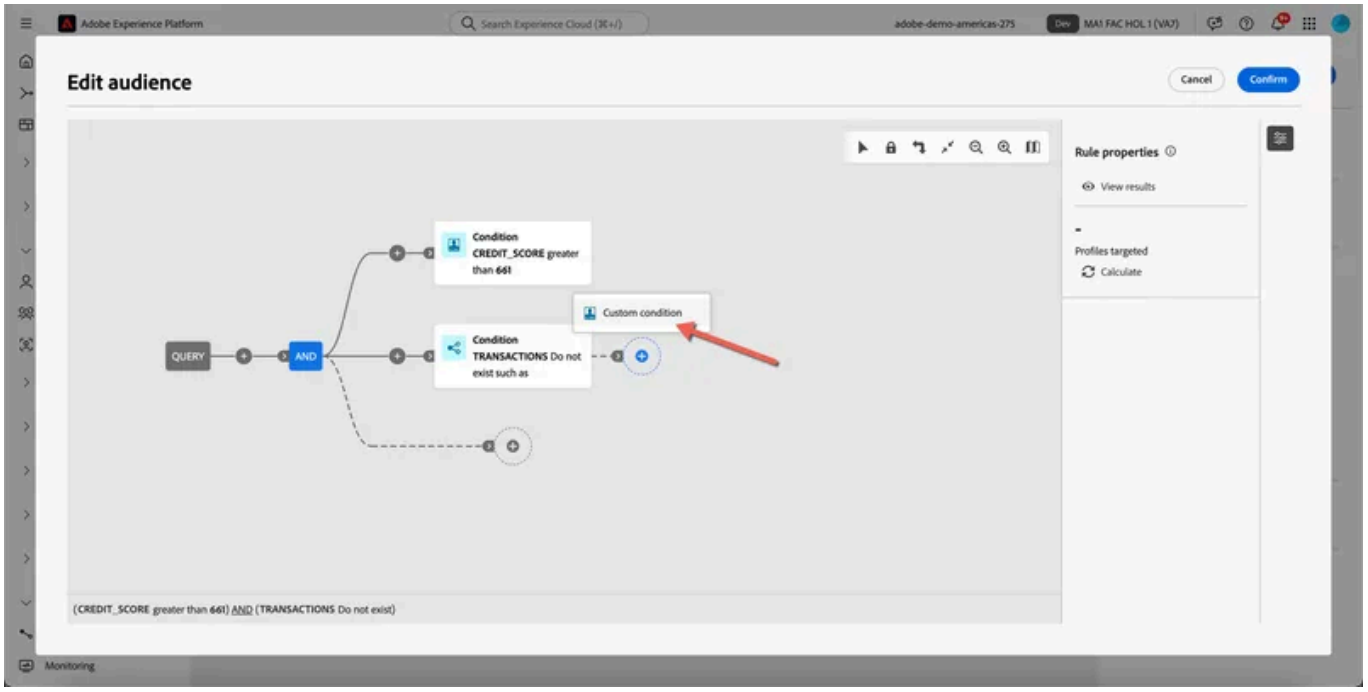
Scroll down to where you can see the linked tables. Select the **TRANSACTIONS** table and click **Confirm.**



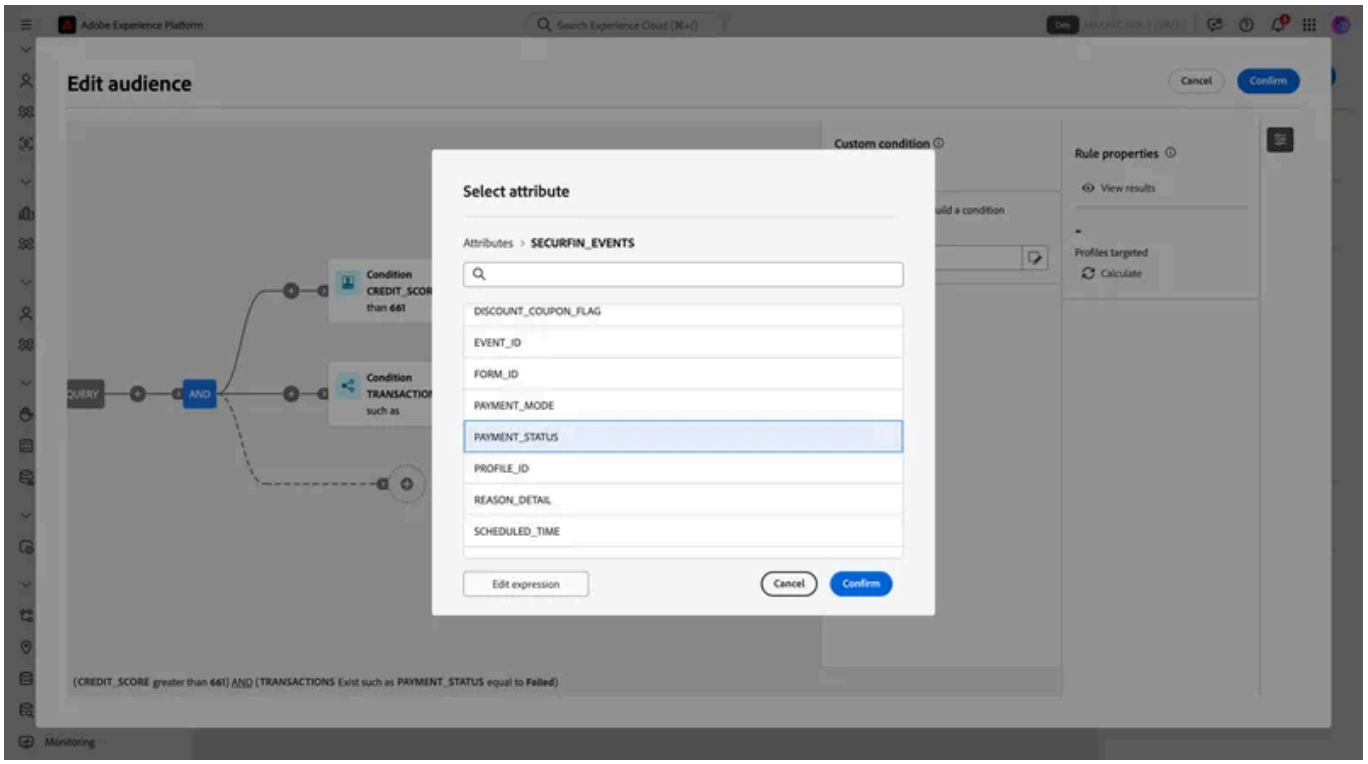
This automatically adds the condition that the profile must have linked transactions - we want customers that haven't had specific transactions so change the Operator to **do not exist such as**.



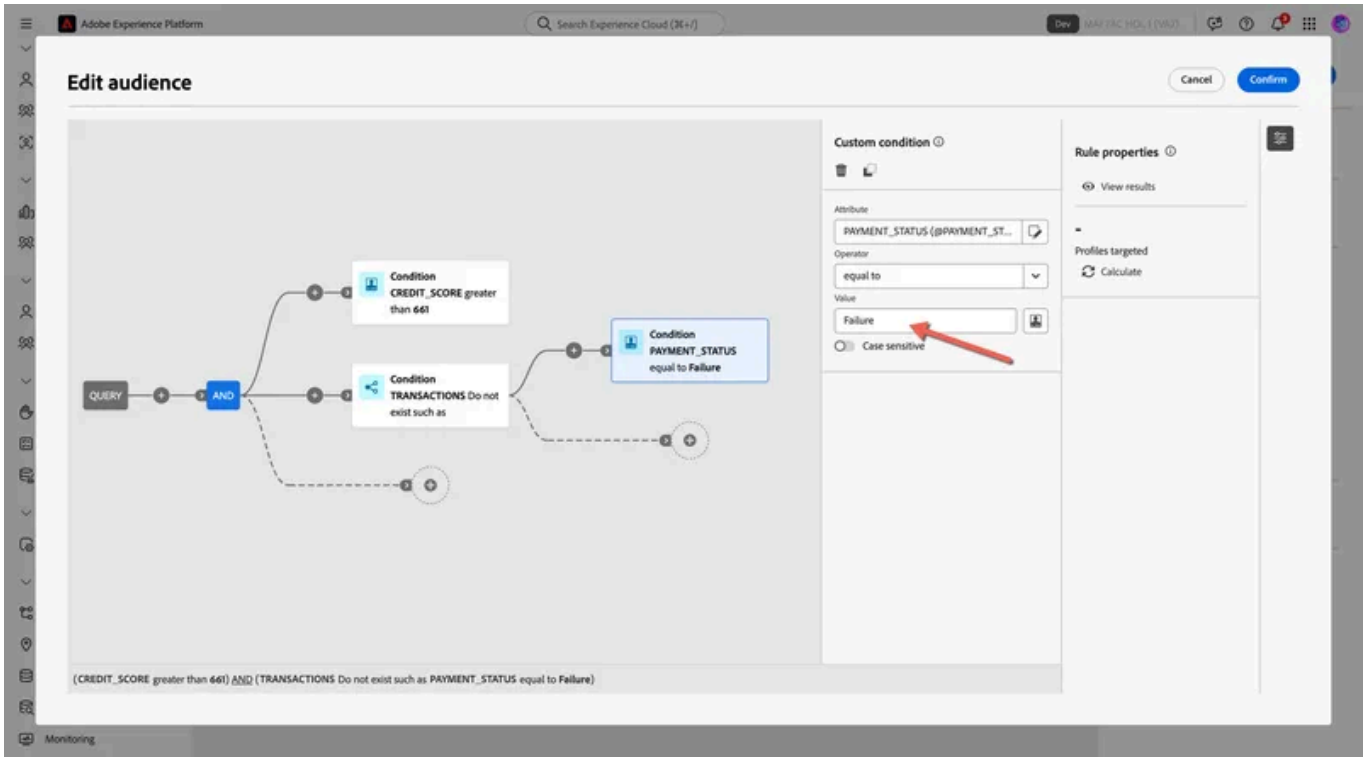
Now click the **+** to add a new sub condition to our query.



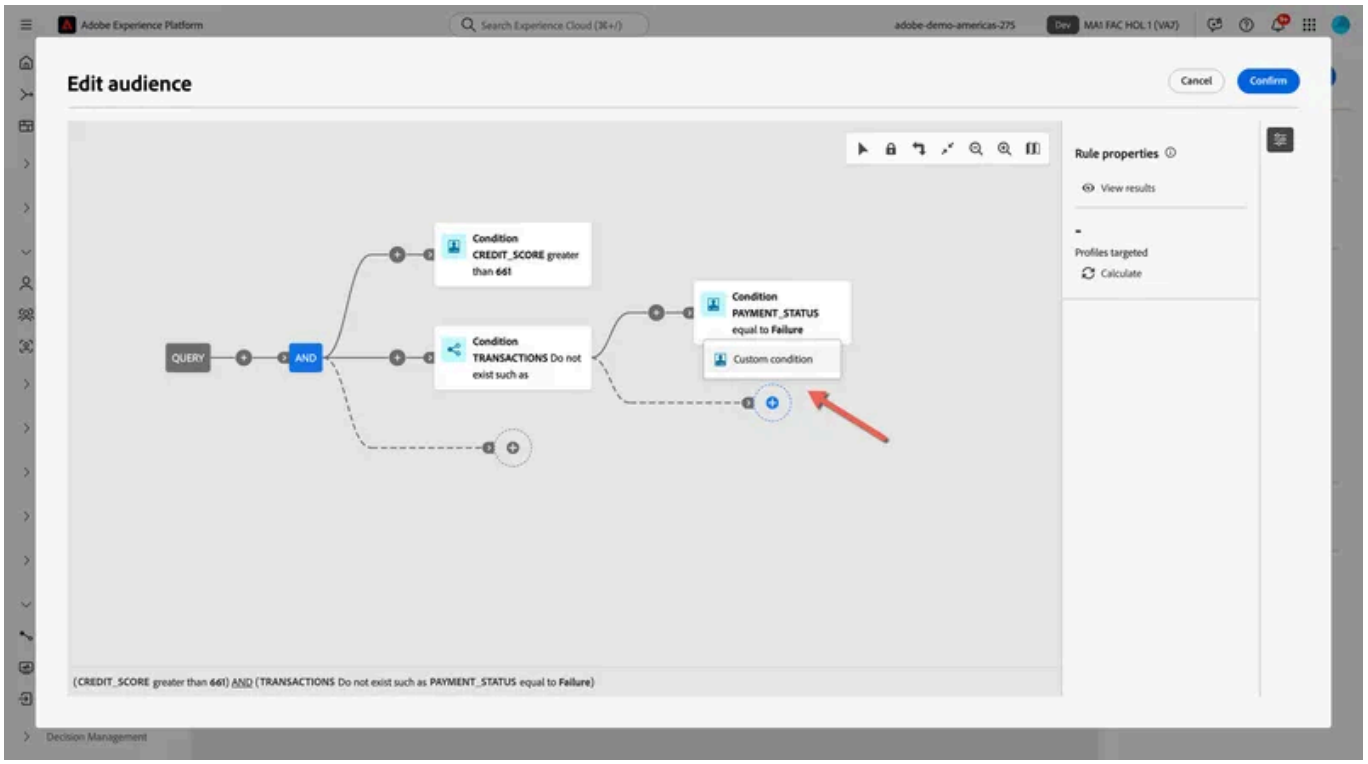
Select the **PAYMENT_STATUS** attribute



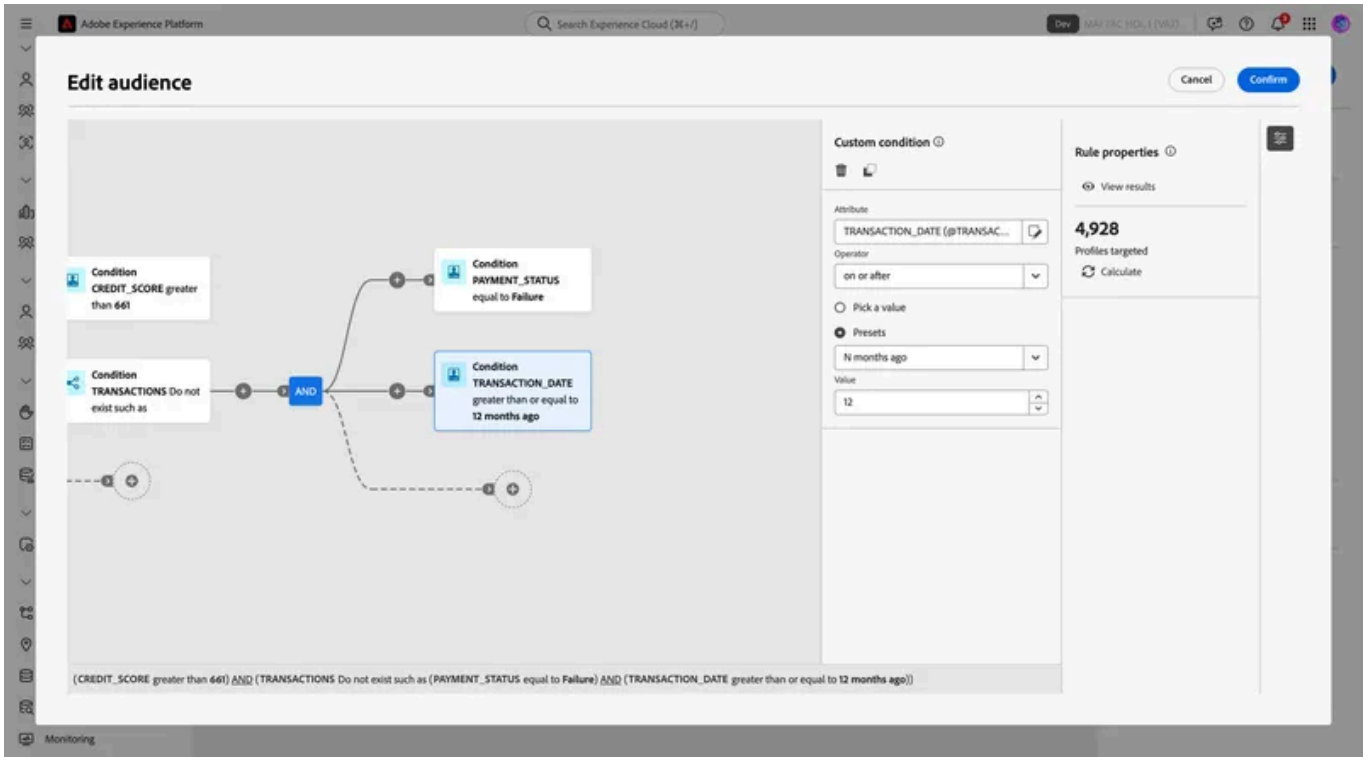
Set the value to **Failure**



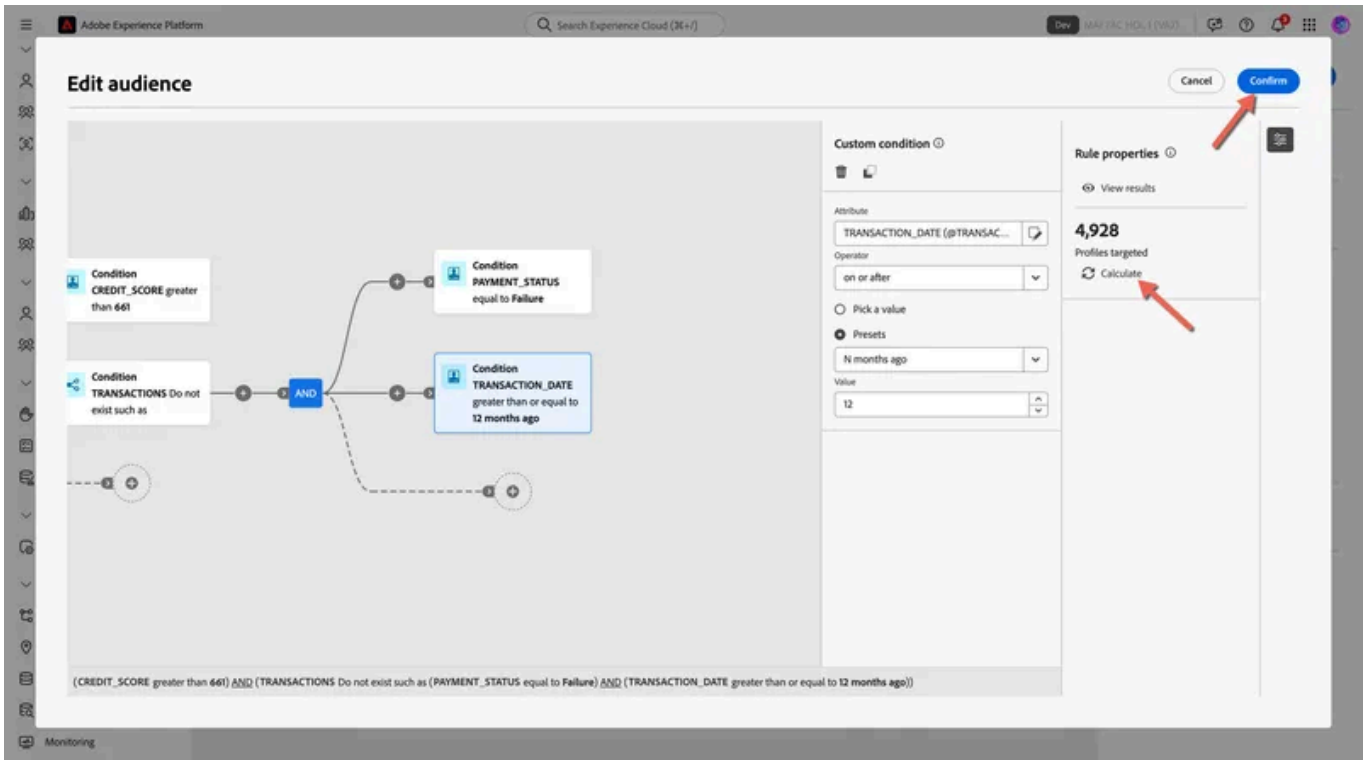
Add another custom condition by clicking on the plus.



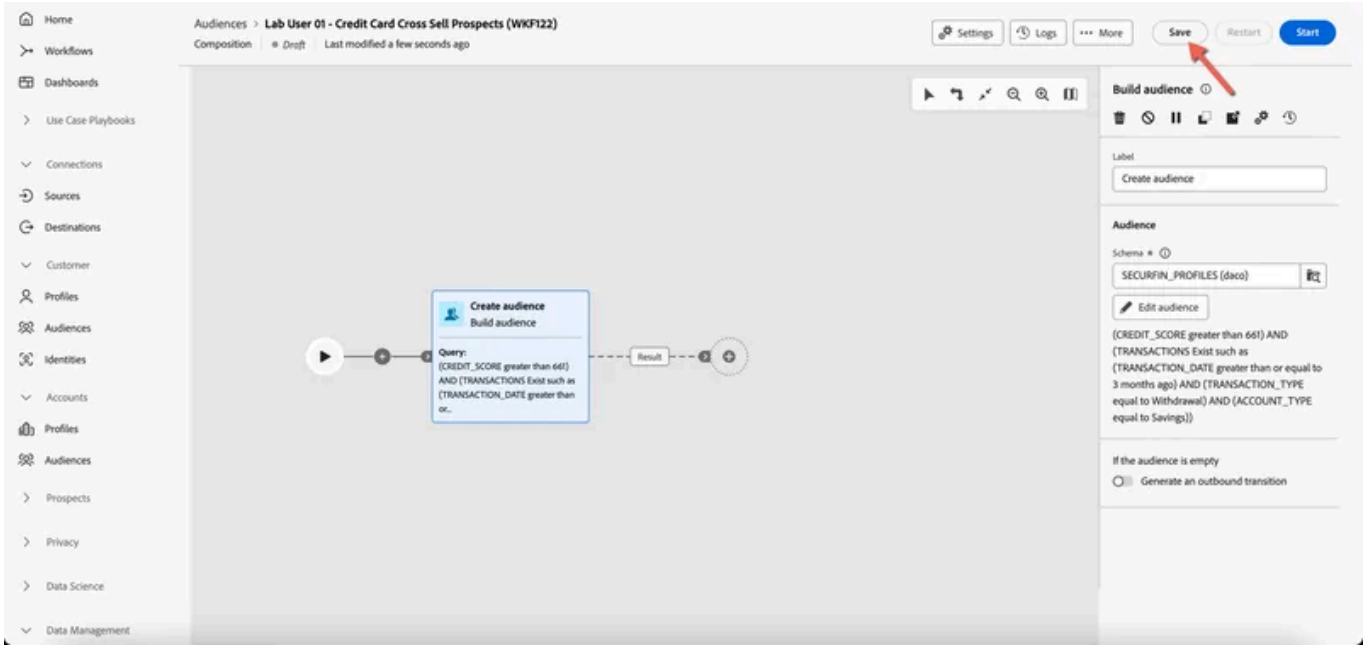
Select the **TRANSACTION_DATE** attribute and set the conditions to **on or after** and preset **N Months Ago** and value **12.**



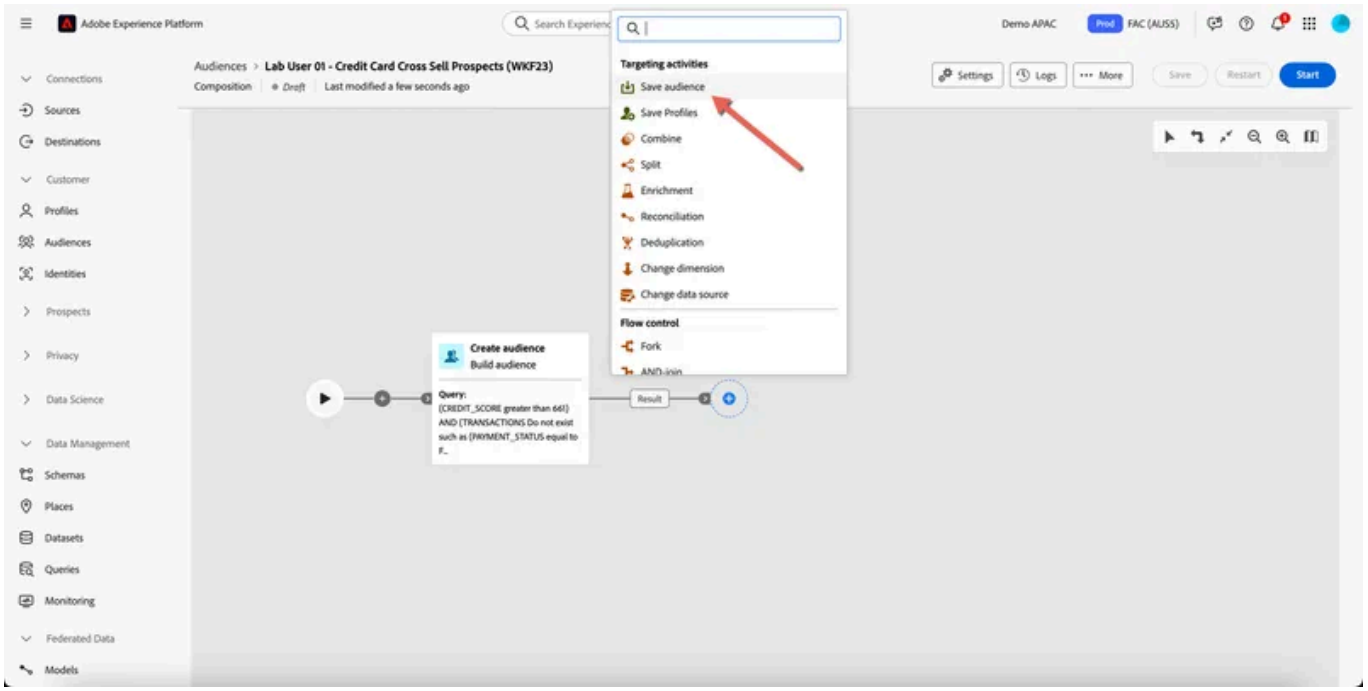
You can click the **Calculate** link to refresh the count. Click **Confirm** to finish configuring the query.



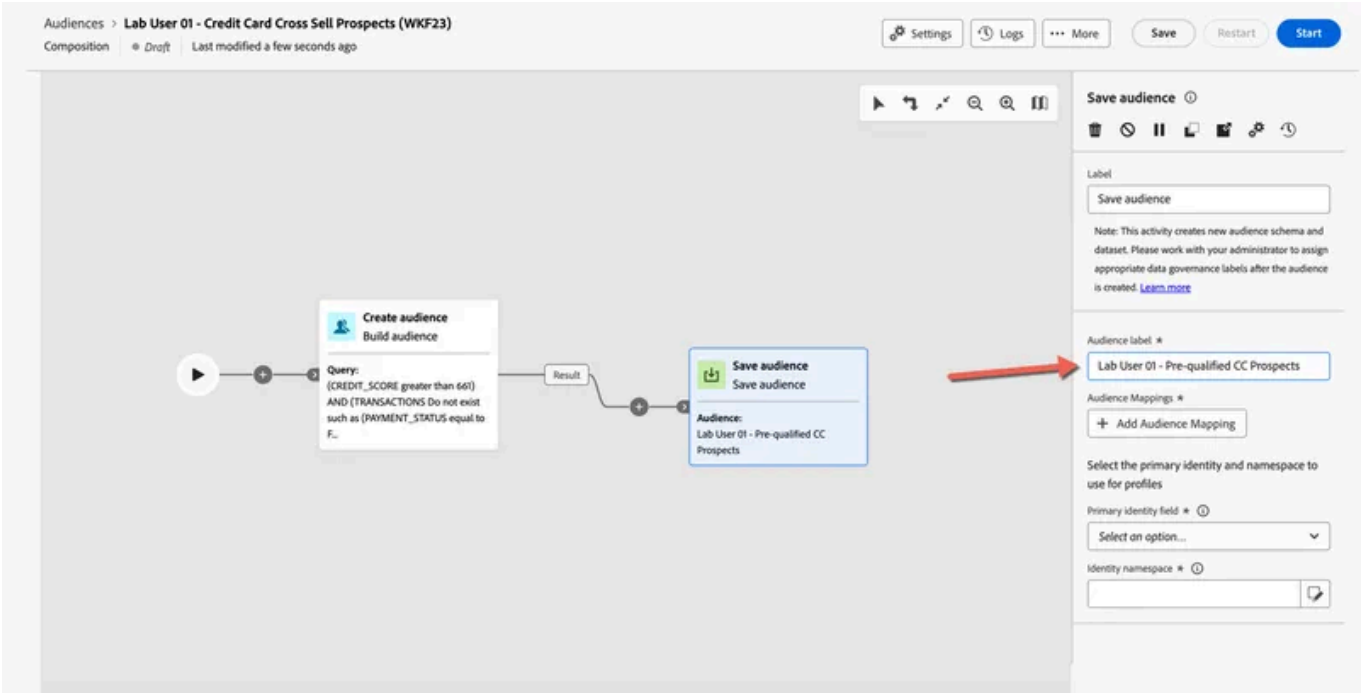
Back in the composition canvas, click to **Save**



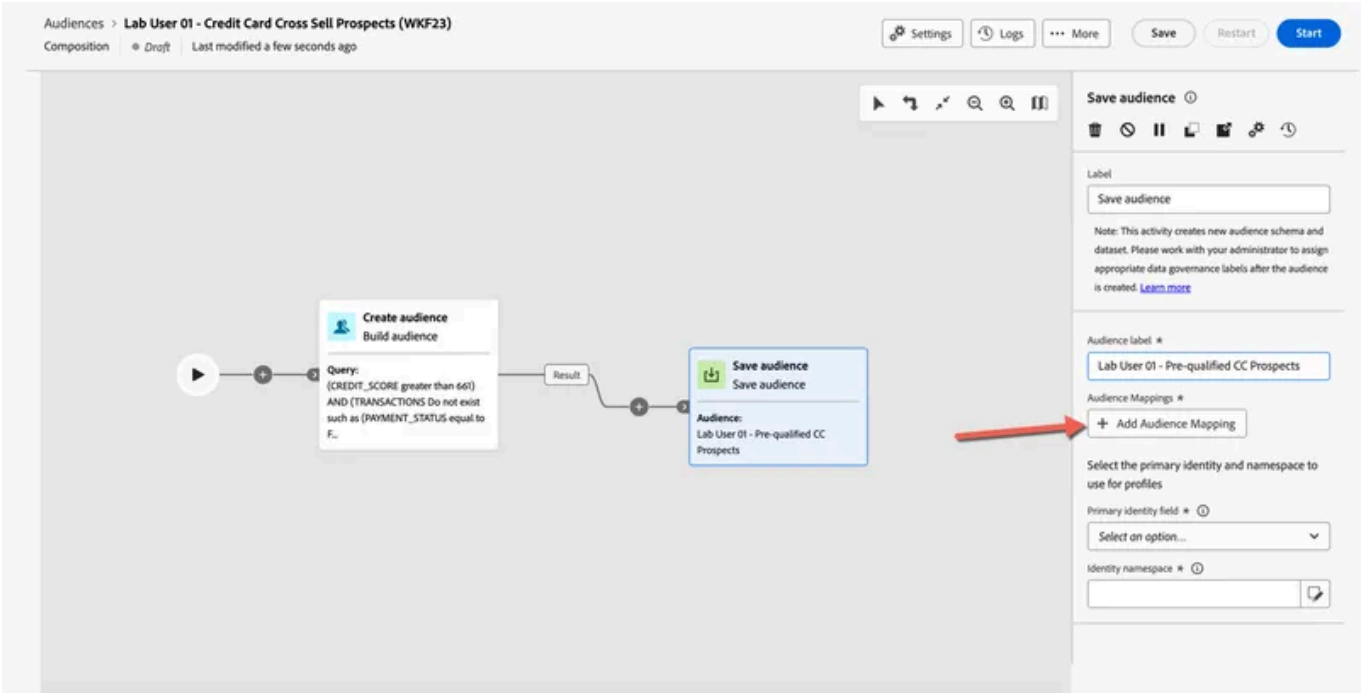
We can continue to add activities to the composition to add additional exclusions or intersections with other data but for this simple use case we are ready to save the result of our query as an audience. Click the + icon and select the **Save Audience** activity.



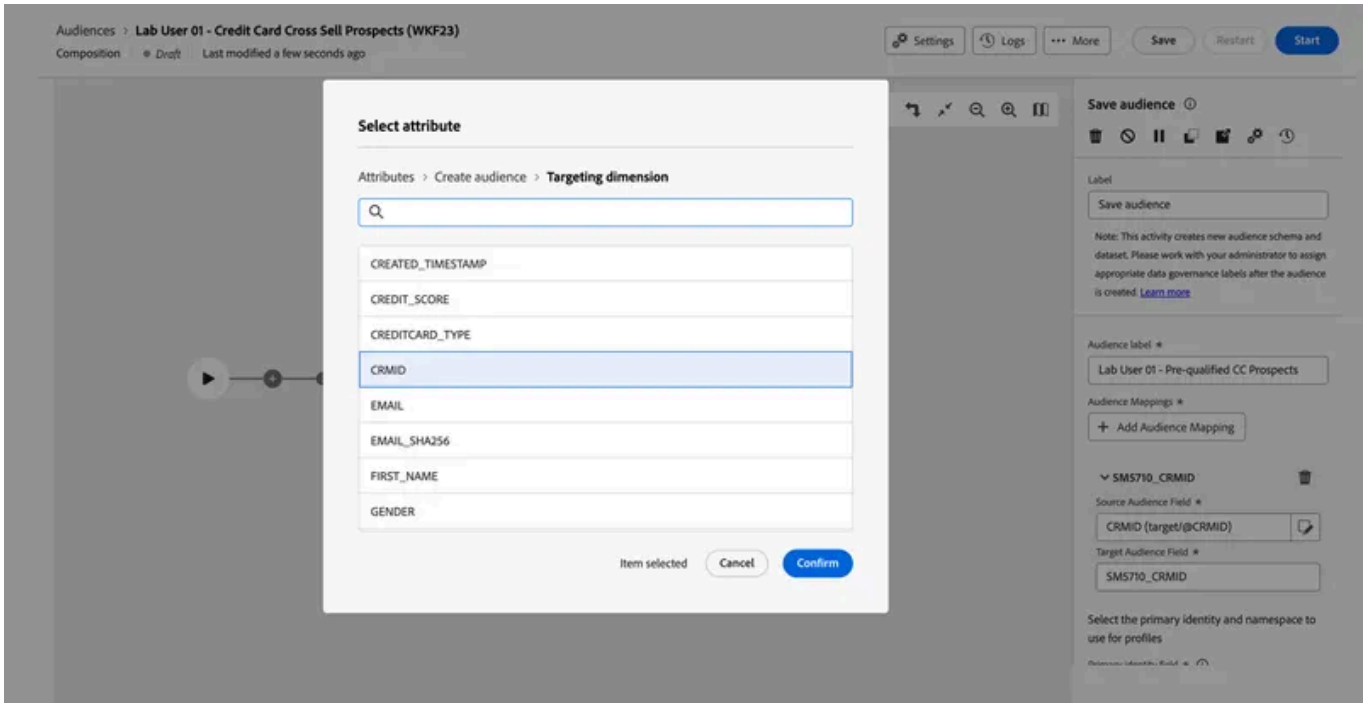
Give your audience a name like **Lab User XX - Pre-qualified CC Prospects.**



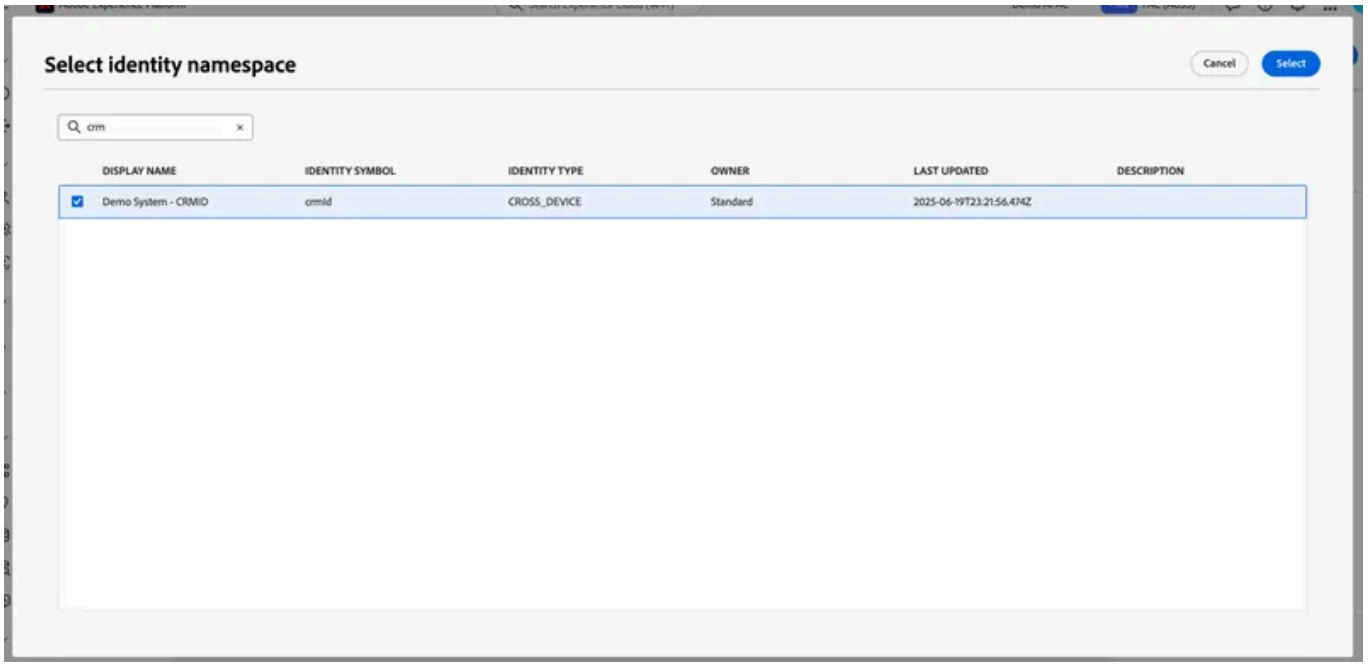
Next we have to configure the audience mapping, this is how we control which data fields are transferred from Snowflake to Adobe. Click the **+ Add Audience Mapping** button.



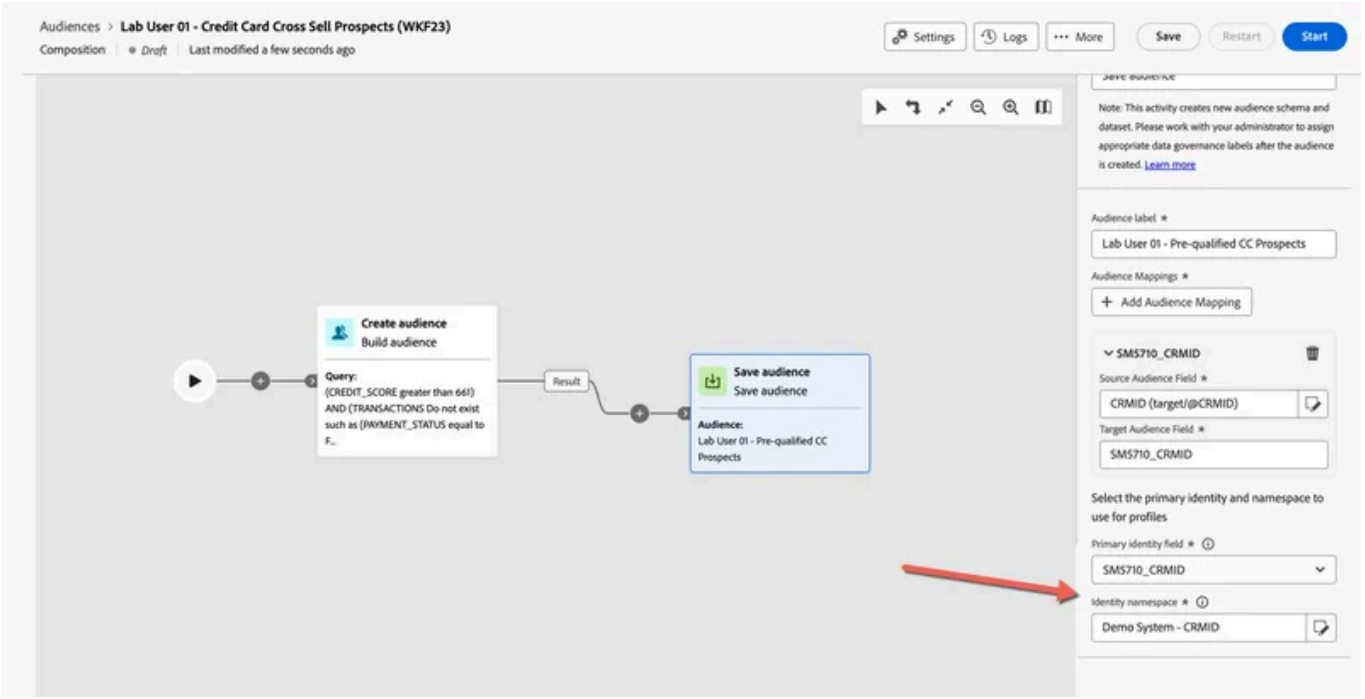
In this case the only information we need from Snowflake are the customer id's, none of the raw transaction data or credit information will leave Snowflake. Click through to the **Targeting Dimension** and then select the **CRMID** attribute and click **Confirm.**



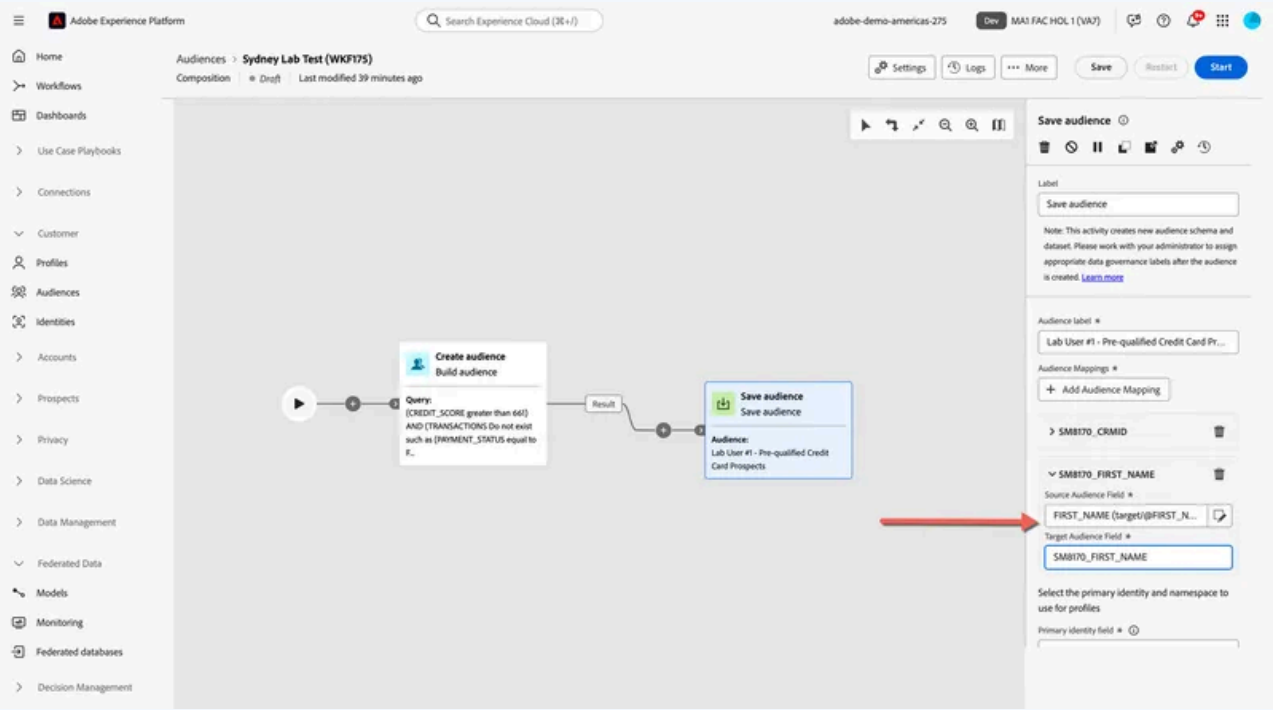
Once we've selected the identity field in snowflake we need to define which identity namespace it will match to in Adobe Experience Platform. Set the **Identity Namespace** field to **Demo System - CRMID** and click **Select.**



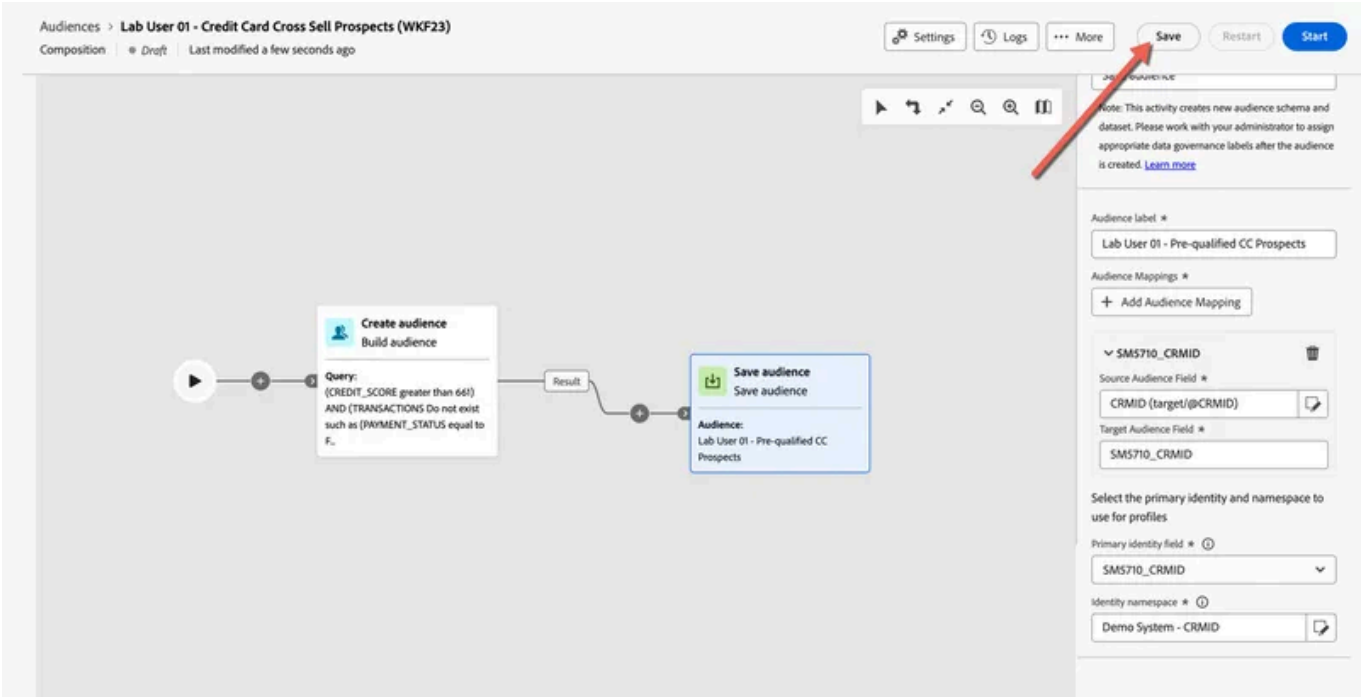
Your settings should look like this:



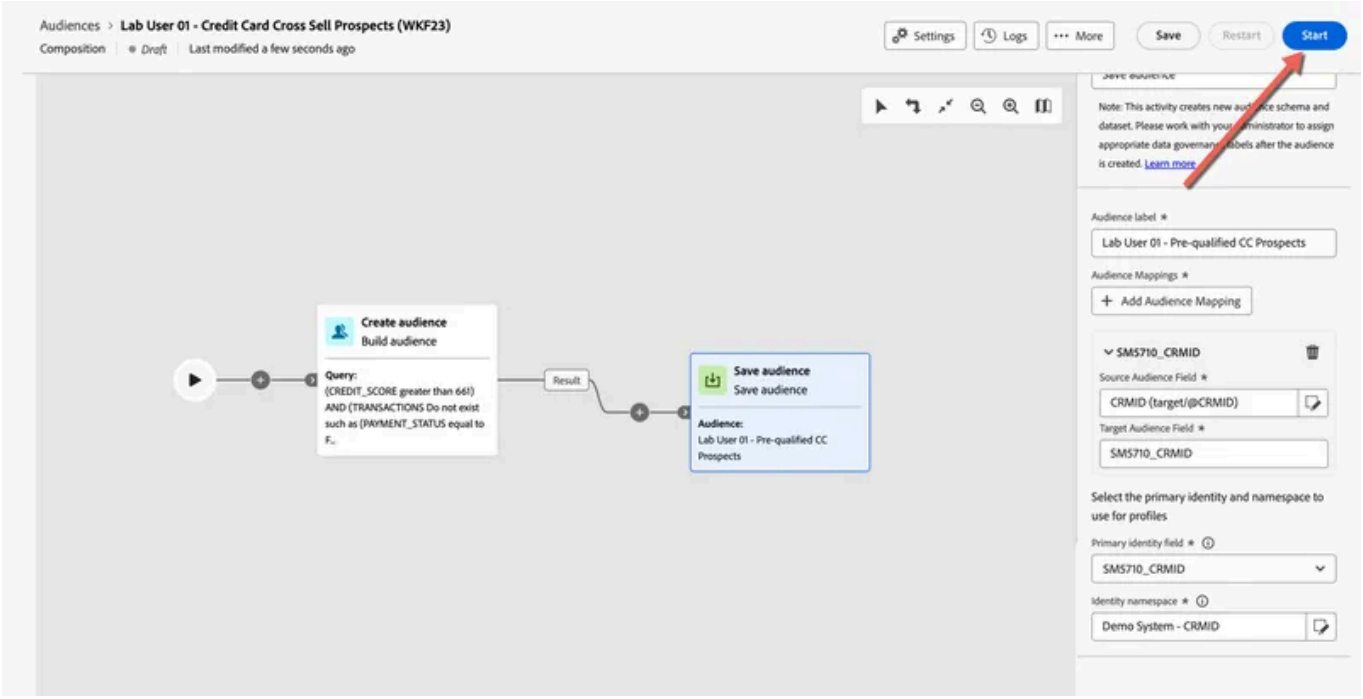
If you want, you can add additional audience mapping attributes to send additional data fields from snowflake to AEP as part of the audience context, but this is not required. These additional attributes can be used for personalisation in AJO or passed to connected destinations via RT-CDP.



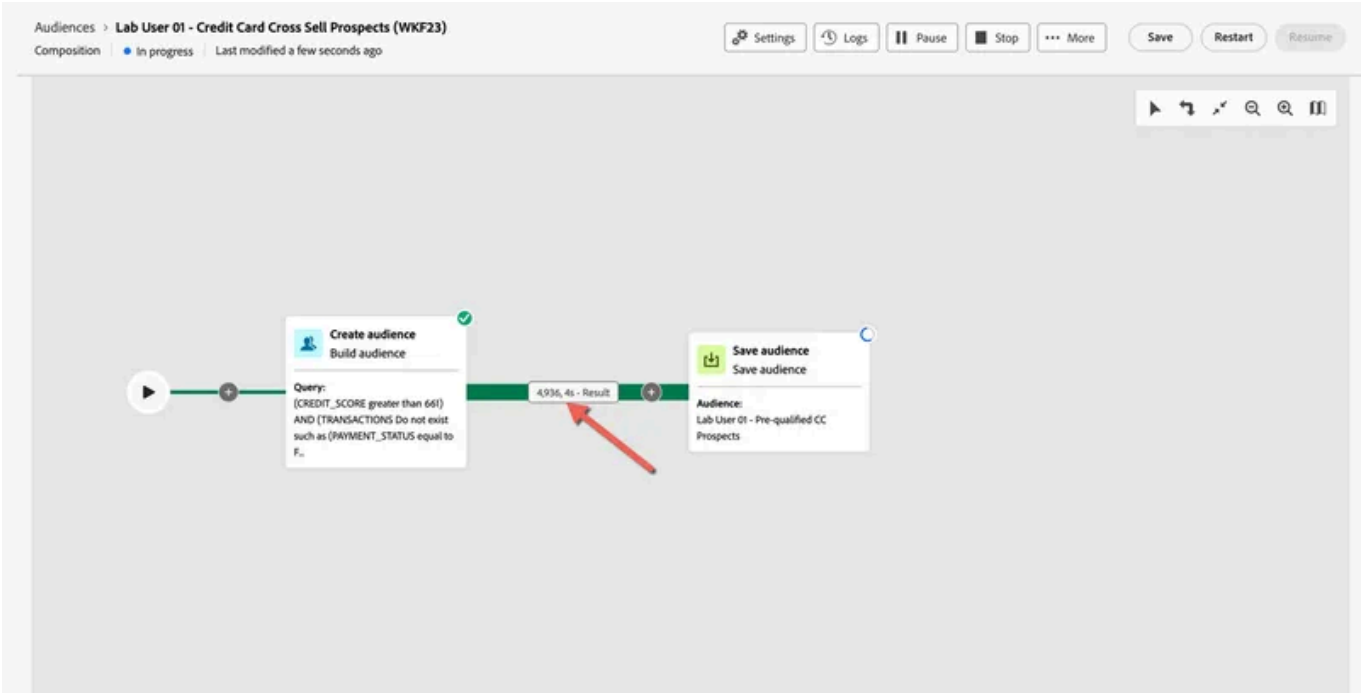
Click to **Save** the composition



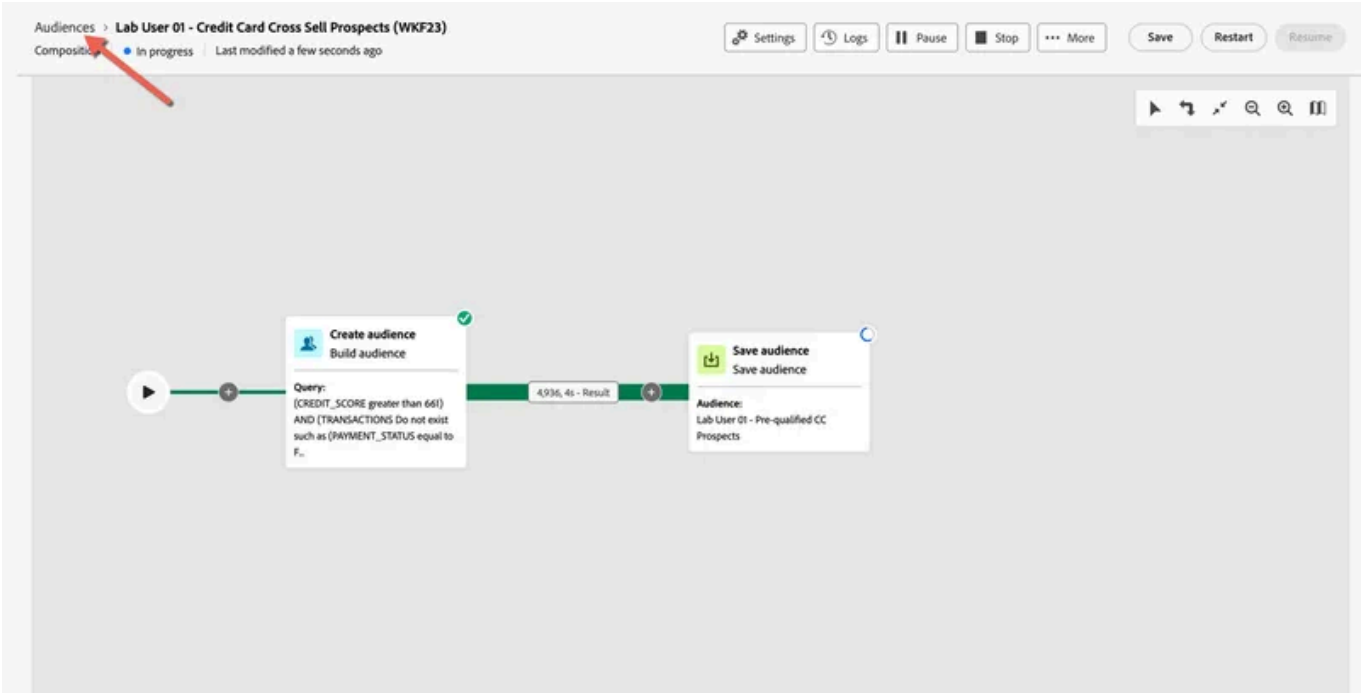
With our composition configured, click **Start** to run the workflow. This will execute the query in Snowflake and transfer the results to Adobe.



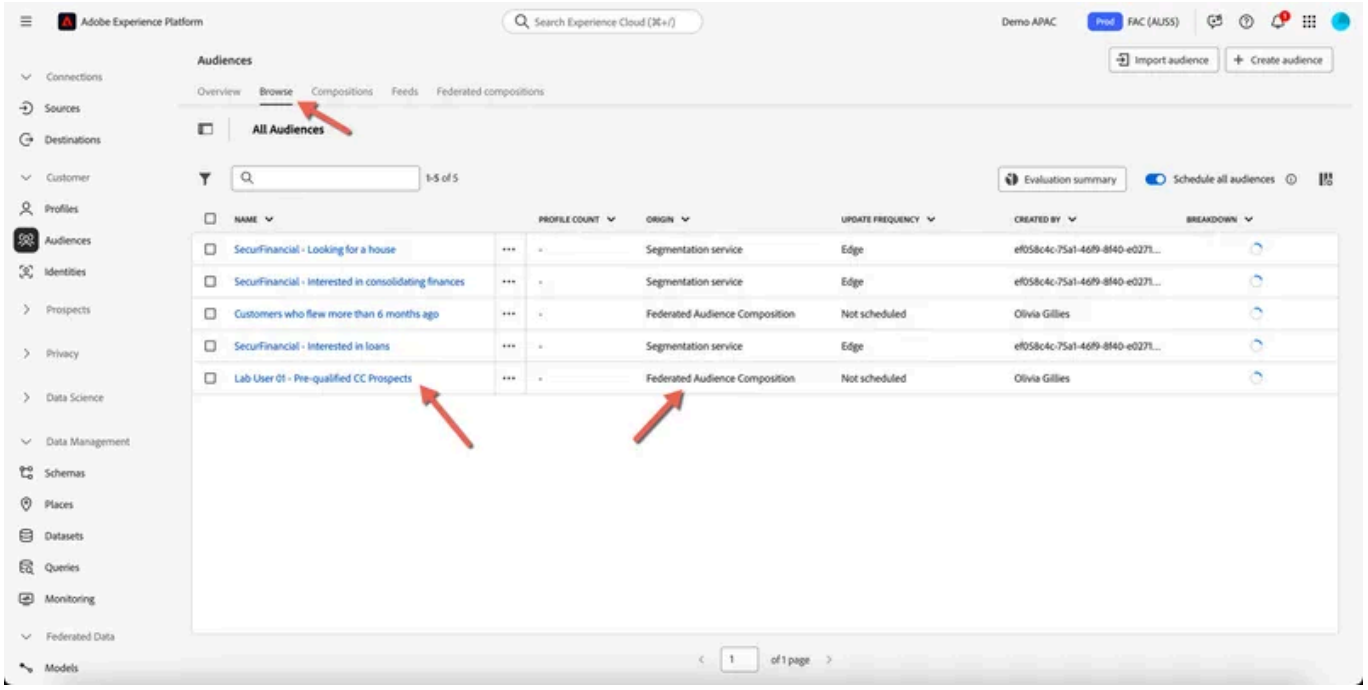
You can see the result of the query displayed as the composition executes.



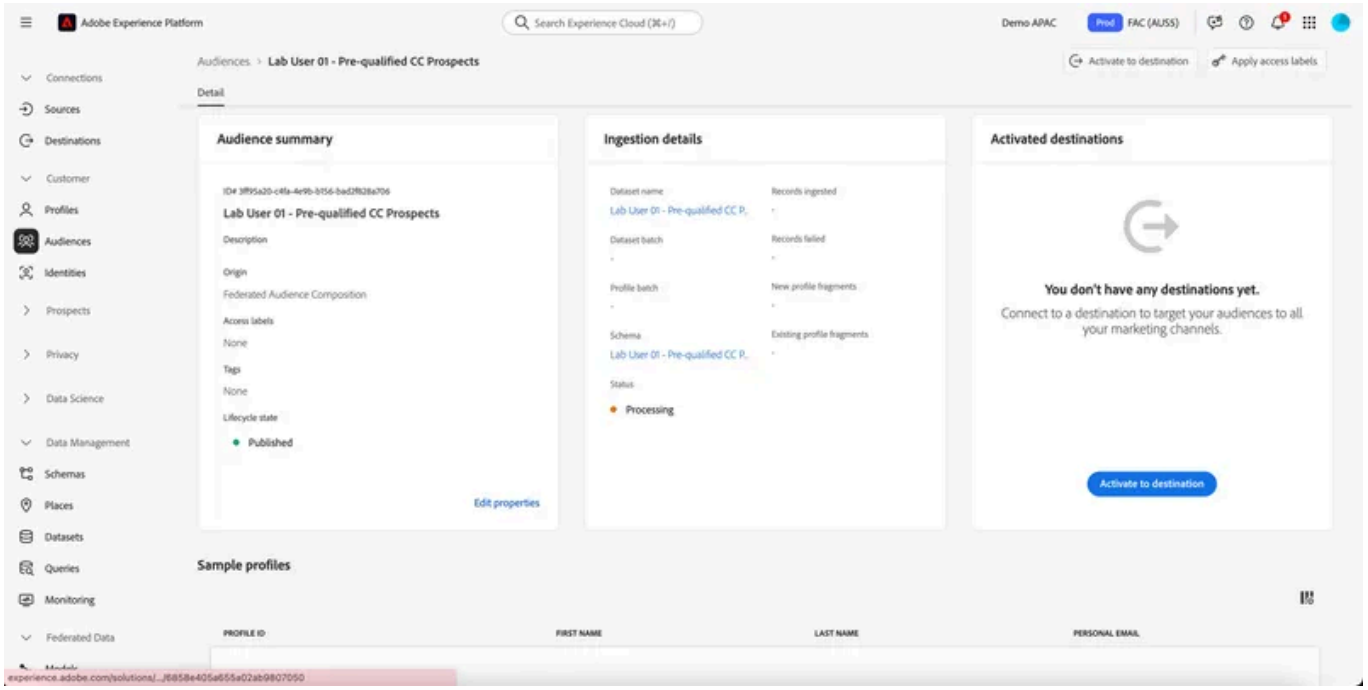
Click on Audiences beside the composition label to return to the audience portal.



You should see your audience in the list of audiences with origin Federated Audience Composition.

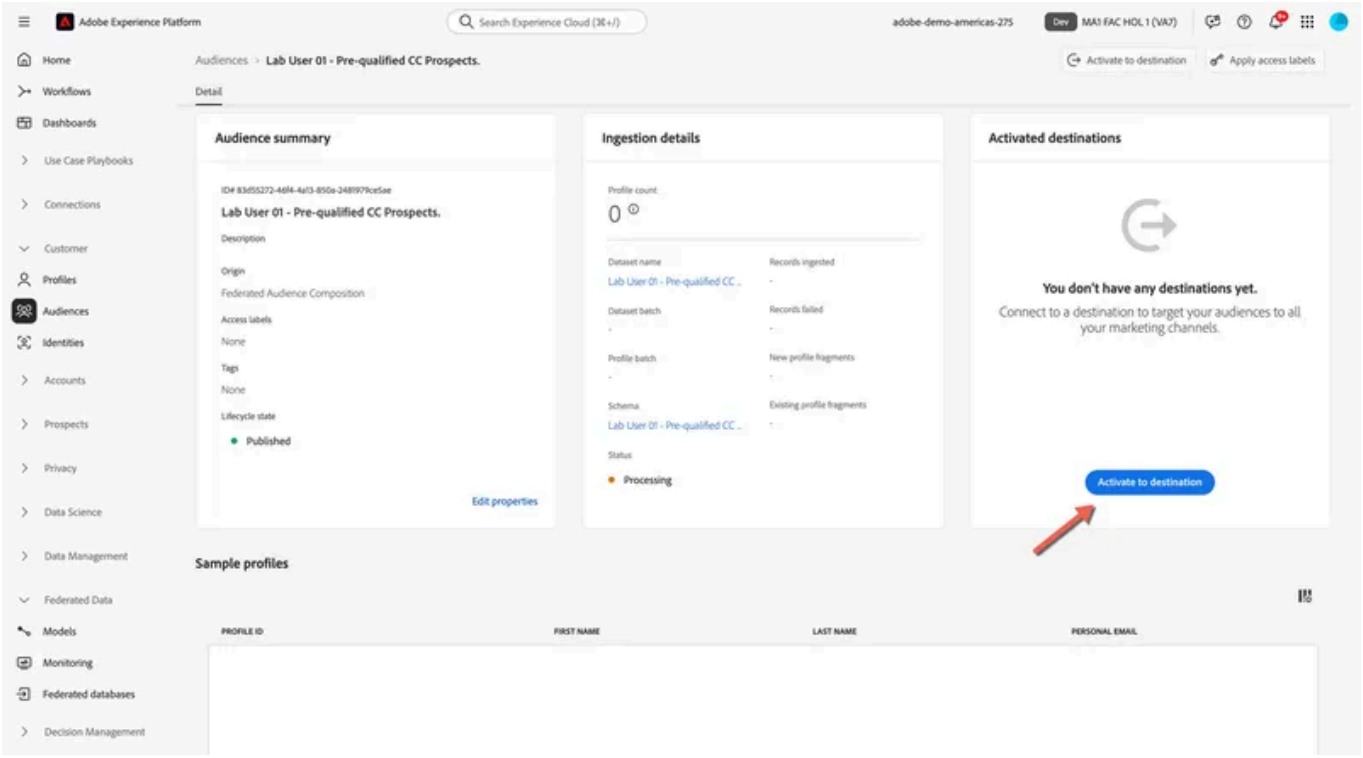


Click on the audience name and you can see the details of the ingestion from Snowflake.



Congratulations, you've created your first Federated Audience! You can now activate them using RTCDP's Destination catalog or target them in a Campaign or Journey in AJO.

Beyond the audience membership, any additional attributes that are passed from the warehouse are also available for activation or personalisation.



Summary

Congratulations, you've completed the exercise on Federated Audience Composition. You learned how SecurFinancial extends its segmentation capabilities by querying external data sources—without ingesting them—enabling faster, compliant, and more flexible audience creation.

We've only barely touched the surface of the types of audiences that can be built with Federated Compositions - we'll dive further into the different use cases supported and some more advanced composition examples after the break today!

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