



FAC - HOL | Truist

1. Welcome

We're excited to have you join us today as we dive into Federated Audience Composition. This session is designed to be interactive, giving you the opportunity to explore these capabilities firsthand. In this hands-on lab, you will learn how you can minimize data copy by capitalizing on your existing tech stack to build and enrich audiences using Federated Audience Composition. Discover how to combine first-, second-, and third-party data in a seamless manner while maintaining privacy and compliance. Perfect for marketers, data analysts, and anyone looking to strengthen audience segmentation and targeting through federated data solutions.

Agenda

- ☐ **Data warehouse Connection** Connect to Snowflake **[demo]**
- ☐ **Audience Creation** How to query an audience rule to access federate attributes **[exercise]**
- ☐ **Map Federated Audience to a Destination** Map a federated audience to an S3 and use federated audience fields to send enrichment attributes downstream **[demo]**
- ☐ **Build a Journey with Federated Audience Data** Use federated audience to start your journey and federated attributes to personalize your email content **[exercise]**
- ☐ **Audience Enrichment** Learn how to use a streaming (or any) audience in AEP to enrich a Federated Audience Composition, and learn how to use a federated audience to enrich your AEP audience rule **[demo]**
- ☐ **Profile Enrichment** Combine your existing audiences in platforms like Adobe Experience Platform (AEP) with data from a separate, supported enterprise data warehouse (like Snowflake or Google BigQuery) without moving that data into AEP

2. Getting Started

Accessing the Experience platform

- Use Chrome or Firefox
- Sign-out of your Adobe Experience Cloud, or use a private browser window
- Do not use your own credentials to access the demo instance for this lab. Instead, you'll use the credentials provided here.

Adobe Experience Platform URL <https://platform.adobe.com/>

Username *assigned below*

Password (You set your password at 1st time login. Keep note of it)

User	Adobe User
Shekhar.Dahiya	ajoholuser+truist1@adobetest.com
Jon.revill	ajoholuser+truist2@adobetest.com
Daniel.Miller	ajoholuser+truist3@adobetest.com
Melanie.G.Lewis	ajoholuser+truist4@adobetest.com
Catherine.Chui	ajoholuser+truist5@adobetest.com
Jeanne.Peterson	ajoholuser+truist6@adobetest.com
Kris.Berzkalns	ajoholuser+truist7@adobetest.com
Wayne.Cunningham	ajoholuser+truist8@adobetest.com
Gauramohan.Kashalika	ajoholuser+truist9@adobetest.com
Ashwini.Kesarkar	ajoholuser+truist10@adobetest.com
Mittal.Vora	ajoholuser+truist11@adobetest.com
Jonathan.Anderson	ajoholuser+truist12@adobetest.com
Dhiva.Sokkathavar	ajoholuser+truist13@adobetest.com
Ashish.Kulkarni	ajoholuser+truist14@adobetest.com
Available Account	ajoholuser+truist15@adobetest.com



Experience Cloud

Sign in to access the Experience Cloud for your organization.

 Do you usually sign in with Facebook, Google or Apple? Enter your email below and we'll help you sign in.



Sign in

New user? [Create an account](#)

Email address



Continue

3. Lab Takeaway

We hope you found the content informative and valuable as you continue to explore the powerful capabilities of Federated Audience Composition. We appreciate your time and active engagement.

Lab Recording

3:01:25

Lab Content

 [FSI_FAC_HoL_Truist.pdf](#)



Experience League

Configuring Federated Databases

<https://experienceleague.adobe.com/en/docs/federated-audience-composition/using/config/federated-db>

Snowflake

<https://experienceleague.adobe.com/en/docs/federated-audience-composition/using/config/federated-db#snowflake>

4. Data warehouse Connection Demo

SecurFinancial is a leading financial services firm that leverages its wealth of customer data across disparate sources to personalize offers and campaigns for a large number of segments.

Use Case

SecurFinancial would like to launch an email campaign to retarget its customers who are prequalified for a loan based on good credit and do not have an active loan in their SecurFinancial portfolio. While they are ingesting online behavioral data in real time, they face challenges in identifying customer prequalification, as they are restricted from ingesting credit information into AEP. To qualify prequalified customers without moving restricted data, they will use Federated Audience Composition to enrich their AEP behavioral audience.

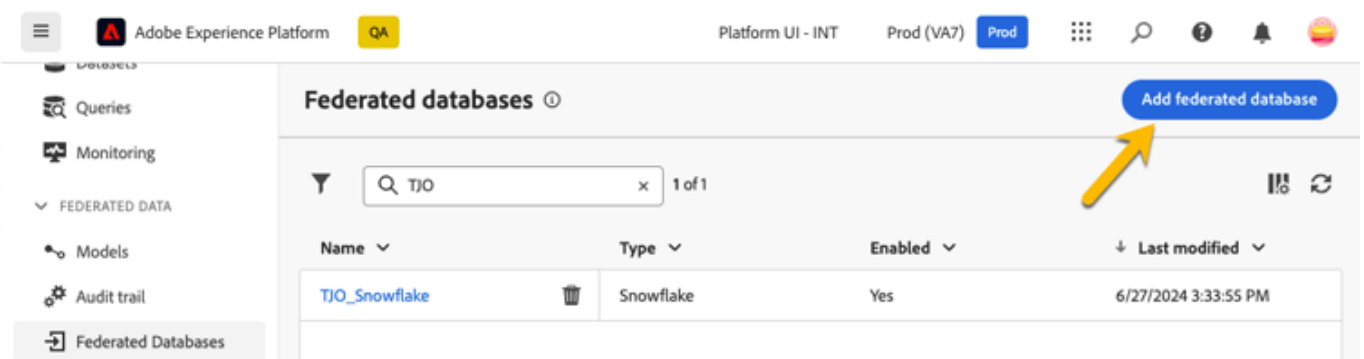
[Hands off keyboard!]

This demo will guide you through the process of using Experience Platform Federated Audience Composition to connect to Snowflake and query an audience.

Prerequisites:

- Adobe Experience Platform account with appropriate permissions.
- Data warehouse account with the necessary database and credentials.

To setup a connection with your database, follow these steps:



The screenshot displays the Adobe Experience Platform interface for managing federated databases. The top navigation bar includes the Adobe Experience Platform logo, a QA tag, and environment selectors for Platform UI - INT, Prod (VA7), and Prod. The left sidebar lists various features: Queries, Monitoring, FEDERATED DATA, Models, Audit trail, and Federated Databases (which is currently selected). The main content area is titled 'Federated databases' and includes a search bar with the text 'TJO' and a result count of '1 of 1'. A table lists the federated database 'TJO_Snowflake' with a trash icon, type 'Snowflake', status 'Yes', and last modified date '6/27/2024 3:33:55 PM'. A blue button labeled 'Add federated database' is located in the top right corner, with a yellow arrow pointing to it.

Name	Type	Enabled	Last modified
TJO_Snowflake	Snowflake	Yes	6/27/2024 3:33:55 PM

1. Browse to **FEDERATED DATA** section on the left rail.
2. In the **Federated Databases** link, click on **Add federated database** button.
3. Add a name and select **Snowflake**
4. Fill in the details, click on **Test connection** button, and on **Deploy functions** button.

For this lab, we will connect to a **Snowflake** account. Federated Audience Composition has a growing list of cloud warehouse connections. See link below for an updated list of integrations

<https://experienceleague.adobe.com/en/docs/federated-audience-composition/using/start/access-prerequisites>

Federated database > **Add federated database**

Properties ⓘ

Label *	Type *
	Select an option... ▼
	Snowflake
	Google BigQuery
	Azure Synapse Analytics
	Vertica Analytics
	Amazon Redshift
	Databricks
	Microsoft Fabric

Properties ⓘ

Name *

TJO_Snowflake

Type *

Snowflake

Details ⓘ

Server *

User *

Password *

Database

Working schema

Private key

 Attach key

Only .pem files are accepted

Options

Options are in 'parameter=value' format, separated by a semicolon (opt1=1;opt2="value";opt3=value3).

☒ Enable connection

Test connection

Deploy functions

Details ⓘ

Server *

[REDACTED] ✓

User *

[REDACTED] ✓

Password *

..... ✓

Database

FAC_TJO

Working schema

Private key

📎 Attach key

Only .pem files are accepted

Options

Options are in 'parameter=value' format (e.g., 'parameter=value1 value2 value3').

☒ Enable connection

Test connection

Deploy functions

✓ Functions installed successfully ×

✓ Connection test successful. ×

Federated Databases > TJO_Snowflake

Snowflake | Last modified a month ago

... More

Properties

Name	Type
TJO_Snowflake	Snowflake
Server	
[REDACTED]	
User	Password
[REDACTED]	
Database	Working schema
FAC_TJO	-
Options	
-	

Connections

Enabled
Yes

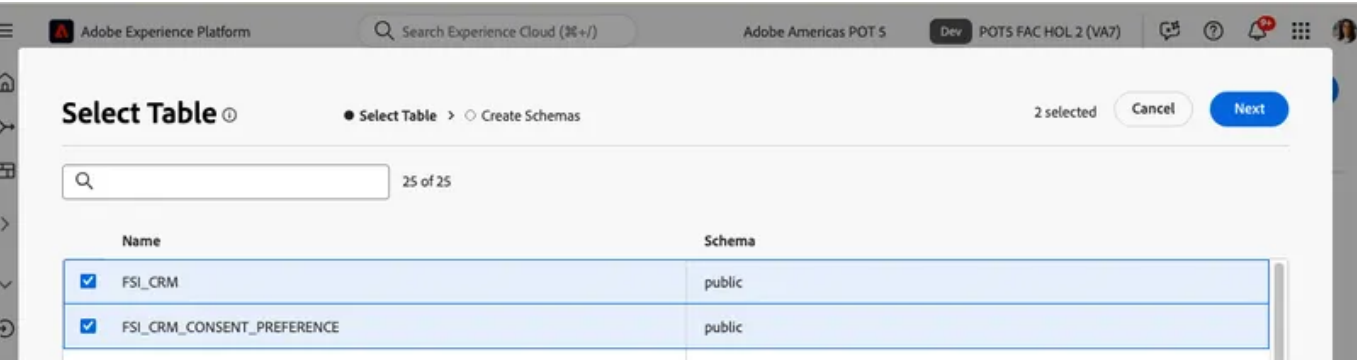
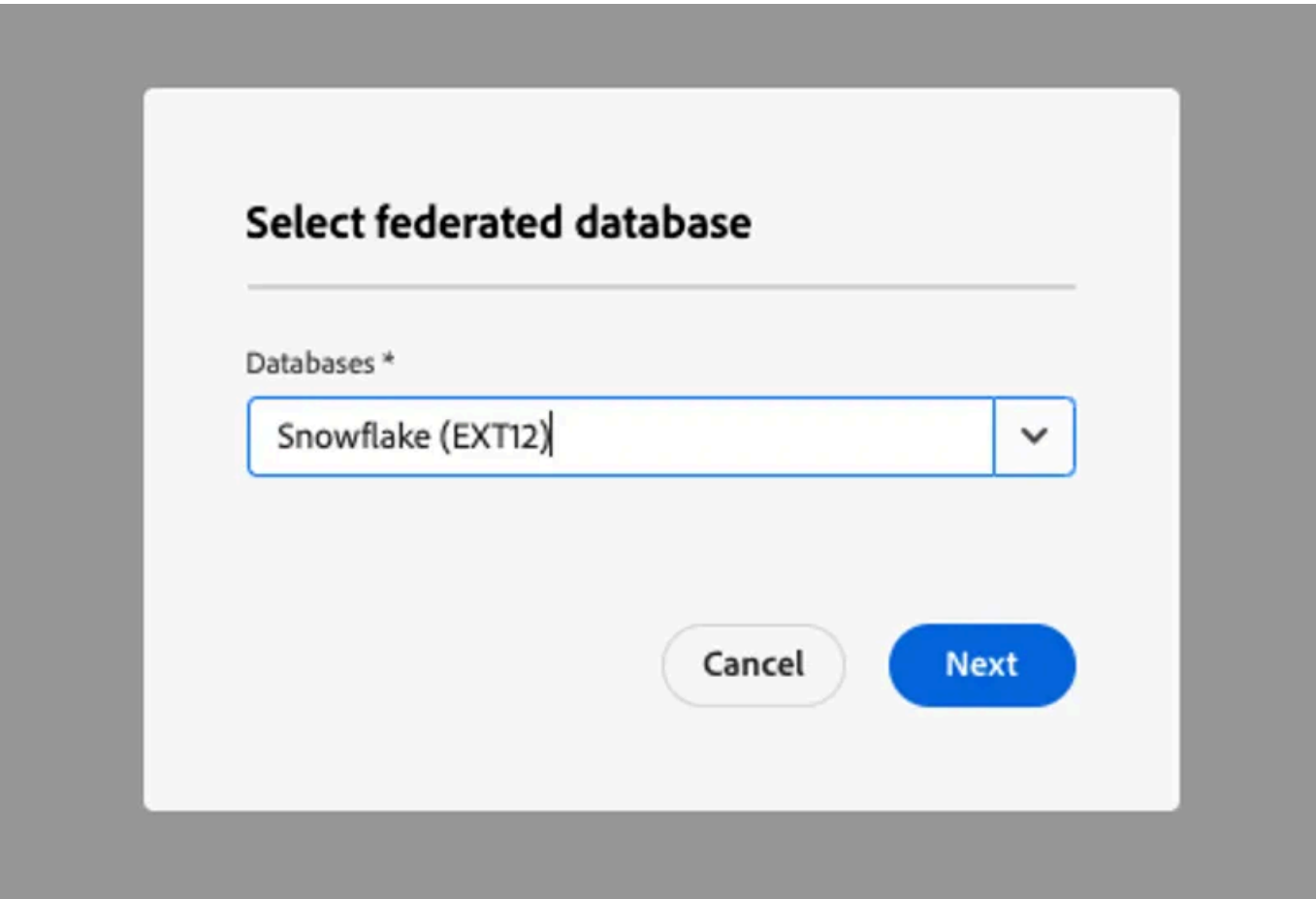
Create a schema

To create schemas in Federated Audience Composition, follow the steps below:

1. In the **FEDERATED DATA** section, click **Models**.
2. Browse the Schema tab and click on the **Create schema** button.
3. Select your source database in the list, and click on the **Add tables** tab.

Select the following tables

- **FSI_CRM**
- **FSI_CRM_CONSENT_PRREFERENCE**



After selecting your tables, you can review the columns of each table then find and select your primary key. For this exercise, we will select **EMAIL** as primary key in both tables

Create Schemas

Select Table > Create Schemas

2 tables, 27 columns selected

Back

Done

Selected tables

Each selected table will create a schema containing selected columns. Configure each schema and its columns.

FSI_CRM

21 of 21 columns selected

X

FSI_CRM_CONSENT_PREFERENCE

6 of 6 columns selected

X

Schema Properties

Schema label ⓘ

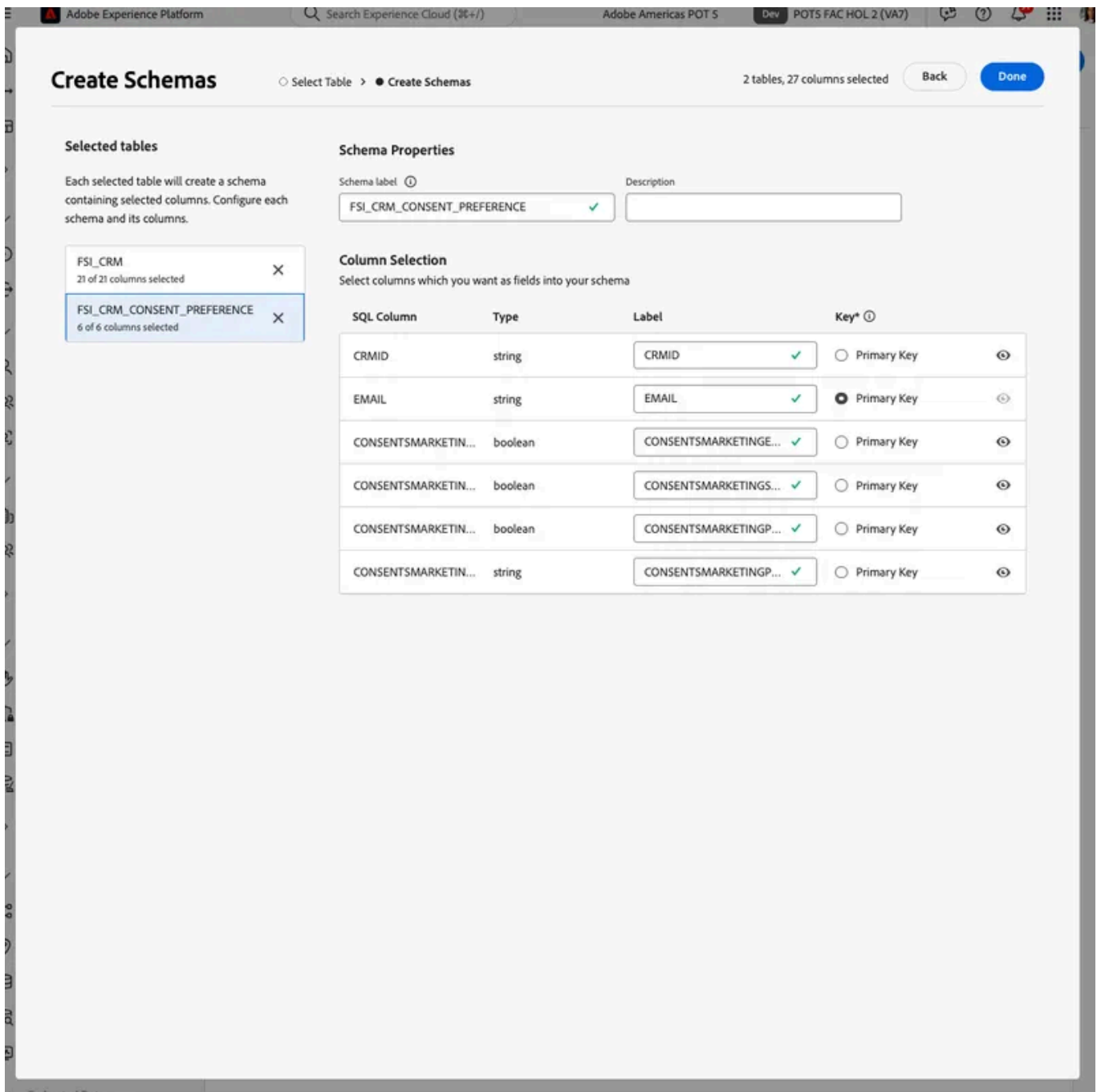
FSI_CRM

Description

Column Selection

Select columns which you want as fields into your schema

SQL Column	Type	Label	Key* ⓘ
TESTPROFILE	boolean	TESTPROFILE	☒ Primary Key ⓘ
CRMID	string	CRMID	☐ Primary Key ⓘ
FIRSTNAME	string	FIRSTNAME	☐ Primary Key ⓘ
LASTNAME	string	LASTNAME	☐ Primary Key ⓘ
EMAIL	string	EMAIL	☒ Primary Key ⓘ
PHONE	string	PHONE	☐ Primary Key ⓘ
GENDER	string	GENDER	☐ Primary Key ⓘ
COUNTRY	string	COUNTRY	☐ Primary Key ⓘ
CITY	string	CITY	☐ Primary Key ⓘ
STREET	string	STREET	☐ Primary Key ⓘ
POSTALCODE	string	POSTALCODE	☐ Primary Key ⓘ
BIRTHDATE	date	BIRTHDATE	☐ Primary Key ⓘ
CREDITSORE	string	CREDITSORE	☐ Primary Key ⓘ
CUSTOMERSINCE DATE	date	CUSTOMERSINCE DATE	☐ Primary Key ⓘ
CUSTOMERTIER	string	CUSTOMERTIER	☐ Primary Key ⓘ
EMPLOYMENTSTATUS	string	EMPLOYMENTSTATUS	☐ Primary Key ⓘ
PRODUCTSINCE DATE	date	PRODUCTSINCE DATE	☐ Primary Key ⓘ



Preview data in a schema

To preview the data in the table represented by your schema, browse to the **Data** tab as shown below.

Click on the **Calculate** link to preview the total number of records.

Schemas > **Luma_Orders**

Schema | Last modified a few seconds ago

Overview **Data**

200 of many (calculate)

Total	Order Priority	Order status	Shipping method	Order date	Order ID	Profile ID FK
613	2	3	0	6/22/2022 7:05:06 PM	00000000-0000-0000-000...	00000000-0000-0000-000...
905	3	3	2	2/23/2022 6:05:06 PM	00000000-0000-0000-000...	00000000-0000-0000-000...
333	0	5	2	11/10/2022 6:05:06 PM	00000000-0000-0000-000...	00000000-0000-0000-000...
2K	3	0	0	2/11/2023 6:05:06 PM	00000000-0000-0000-000...	00000000-0000-0000-000...
676	1	1	1	3/15/2022 6:05:06 PM	00000000-0000-0000-000...	00000000-0000-0000-000...
373	2	0	1	8/22/2022 7:05:06 PM	00000000-0000-0000-000...	00000000-0000-0000-000...
1K	0	5	1	8/19/2022 7:05:06 PM	00000000-0000-0000-000...	00000000-0000-0000-000...
360	3	0	1	7/9/2022 7:05:06 PM	00000000-0000-0000-000...	00000000-0000-0000-000...
419	2	0	1	6/16/2022 7:05:06 PM	00000000-0000-0000-000...	00000000-0000-0000-000...
0	0	0	1	2/19/2022 6:05:06 PM	00000000-0000-0000-000...	00000000-0000-0000-000...

Create a data model

Data models allow you to create a link between tables. The link can be created between tables in the same database such as tables in Snowflake. You can also create a link between tables in different databases such as a link between a table in Snowflake and a table in Amazon Redshift.

To create a data model in Federated Audience Composition, follow the steps below:

1. In FEDERATED DATA section, click **Models** then click **Data Model**. Click the **Create data model** button.
2. Provide a name for your data model.
3. Click on Add schemas and select **FSI_CRM** and **FSI_CRM_CONSENT_PREFERENCE** schemas.
4. This will now allow you to create a link between these tables, click on **Create links**.
5. When creating a link, choose the applicable cardinality
 1. **1-N**: one occurrence of the source table can have several corresponding occurrences of the target table, but one occurrence of the target table can have at most one corresponding occurrence of the source table.
 2. **N-1**: one occurrence of the target table can have several corresponding occurrences of the source table, but one occurrence of the source table can have at most one corresponding occurrence of the target table.
 3. **1-1**: one occurrence of the source table can have at most one corresponding occurrence of the target table.

Below is a preview of the link created for the lab exercises. The link enables a join between the CRM and consent tables, using the primary key of EMAIL to perform a join.

Data models > FSI Data Model

Data model

Published

Last update 4 days ago

+ Add schemas

+ Add au

Schemas

Label	Description	Data source
FSI_CRM	...	EXT12
FSI_CRM_CONSENT_PREFERENCE	...	EXT12

Links

Label	Cardinality
FSICRM_FS	1:1

Preview link

Schema

FSI_CRM

Source join

EMAIL

Link name

FSICRM_FSICONSENT

Description

-

Cardinality

☐ 1:N

☐ N:1

☒ 1:1

Target schema

FSI_CRM_CONSENT_PREFERENCE

Target join

EMAIL

Reverse link name

FSICONSENT_FSICRM

☒ External join

☒ Reverse external join

Cancel

5. Audience Creation Exercise

[Hands on keyboard!]

Create a Federated Audience Composition

In this exercise, we will build an audience to qualify SecurFinancial customers who have a credit score of 650 or above and do not currently have a loan in their SecurFinancial portfolio.

SecurFinancial Customers - No Loans, Good Credit

In the **Customer > Audiences** portal, click the **Federated compositions** tab.

Click **Create composition**.



Label your composition **SecurFinancial Customers - No Loans, Good Credit** + *add your initials*. Click **Create**.

Click the **+** button in the canvas and select **Build audience**. The right-hand rail should appear.

Click **Select a schema** and select the **FSI_CRM** schema then click **Confirm**

Click **Continue**. In the query builder window, click the **+** button and then **Custom Condition**. Create the following condition

CURRENTPRODUCTS *does not contain* **Loan**

AND

CREDITSCORE *greater than or equal to* **650**

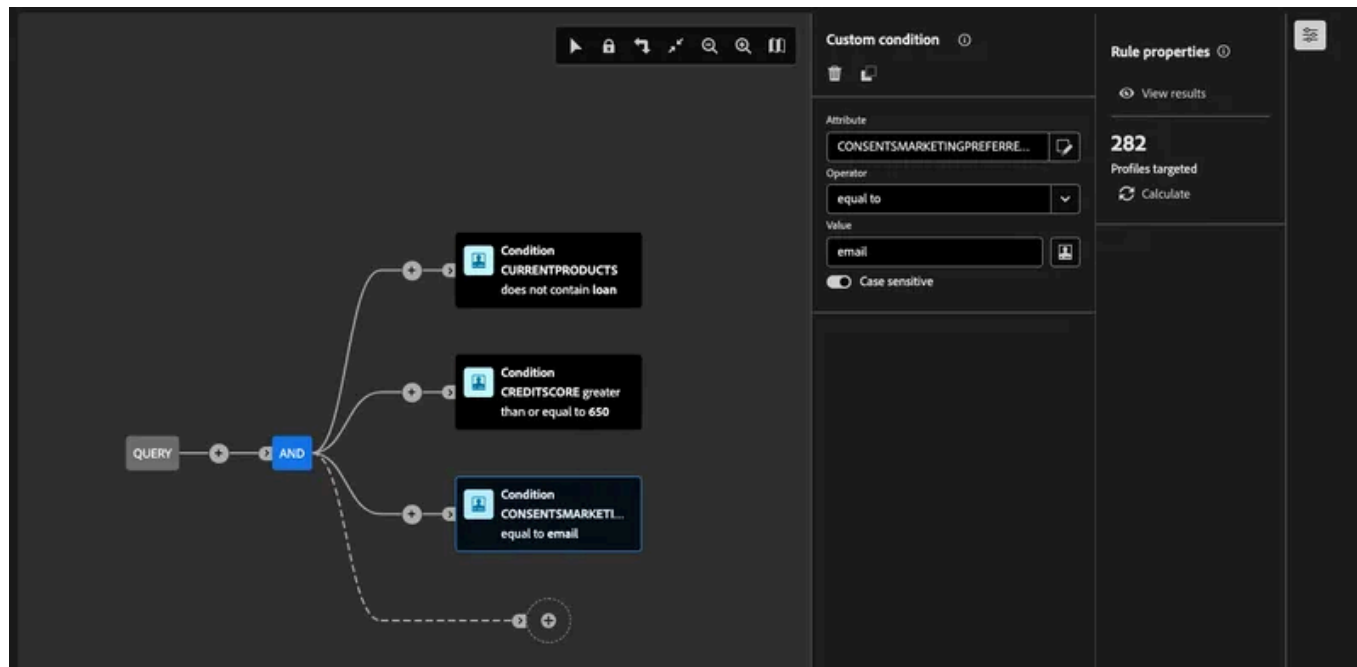
We'll use marketing preference data to segment customers who have opted for **email** as their preferred channel of communication

AND

CONSENTSMARKETINGPREFERRED equal to **email**

Note: *the value field is case-sensitive*

Your query should now look as follows



Click the next **+** button then click **Save audience**.

Label this step **SecurFinancial Customers - No Loans, Good Credit + your initials**. Use the same value as the audience label.

Add the following audience mappings:

Source Audience Field: EMAIL

Source Audience Field: CURRENTPRODUCTS

Source Audience Field: FIRST NAME

Select the primary identity and namespace to use for profiles:

Primary identity field: Email

Identity namespace: Email

Click **Save** and then click **Start**, to run the query of the composition you just built.

Note: We used the Product and Credit information to build our Audience and didn't move sensitive data(eg; credit score) to downstream platforms for activation.

Exp League: <https://experienceleague.adobe.com/en/docs/federated-audience-composition/using/compositions/create-composition/create-composition>

6. Map Federated Audience to a Destination

[Hands on keyboard!]

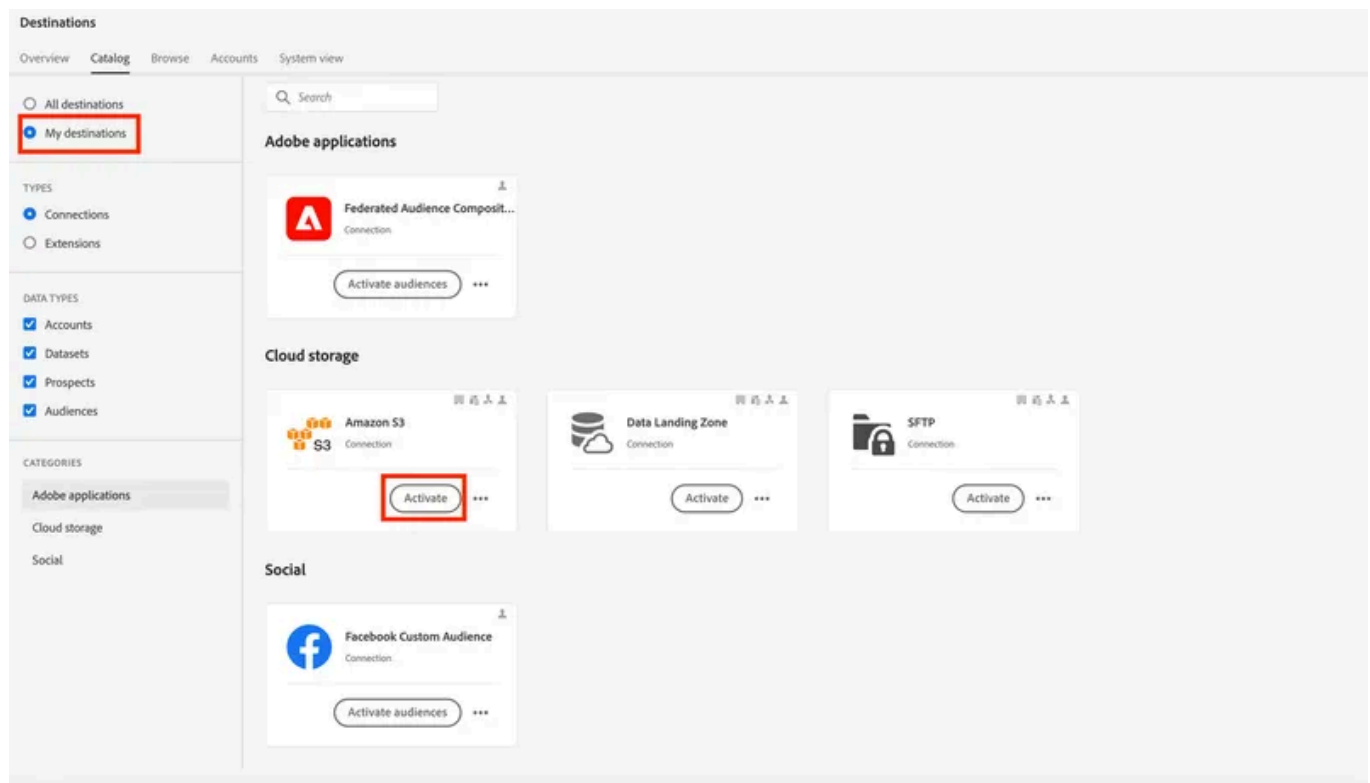
For this exercise, you'll learn how to leverage audience attributes in your data warehouse to enrich your audience's experience in downstream activation workflows using RTCDP destinations. For SecurFinancial, these federated attributes can be used to enrich the customer audience's personalization experience offline. For this example, we will map the federated audience to a pre-configured S3 destination

If you did not finish building your federated audience, no problem! Continue reading to map enrichment attributes using an existing federated audience.

Map the Federated Audience to the Amazon S3 Destination

Navigate to the Destinations portal

Click the 3 dot menu button next to the pre-configured Amazon S3 destination then click **Activate Audiences**



Select **S3** destination then click **Next**

Destinations > Activate destination

Select destination Select audiences Scheduling Mapping Select enrichment attributes Review

Data type Datasets Accounts Prospects Audiences

Configure new destination

NAME	DATA TYPE	LAST DAT...	LAST DAT...	DESTINATION	CONNECTI...	USERNAME	ACTIVATIO...	CREAT...	STATUS
☒ S3	Customers	Success	09/19/2024...	Amazon S3	Server-to-s...	AKIA36EX...	1 audience	08/21/2024...	Enabled

S3

Destination

Amazon S3

Description

Destination ID

T15c3fbc-522c-42ae-b46d-c87798e7a7bf

Activation data

1 audience

Account

amazon-s3

Username

AKIA36EXSAK6YB4OYPET

Created

08/21/2024, 1:59 PM

Status

Enabled

Select the **SecureFinancial Customers - No Loans, Good Credit + lab user ID** audience

Destinations > Activate destination

Select audiences Scheduling Mapping Select enrichment attributes Review

Available audiences

Search

NAME	ORIGIN	PROFILE COUNT
☐ SecurFinancial - Interested in loans	Segmentation Service	0
☐ SecurFinancial - Looking for a house	Segmentation Service	0
☐ SecurFinancial Customer - Loan Application Page Visitor	Segmentation Service	9
☒ SecureFinancial Customers - No Loans, Good Credit SS	Federated Audience Composition	308

1 item selected Clear all

NAME

SecureFinancial Customers - No Loans, Good Credit ...

In the Scheduling section, leave all default settings and click **Next**

In the Mapping step, the following should be included and selected as **Deduplication Key**.

Then click Next

xdm: personalEmail.address

Destinations > Activate destination

Select destination Select audiences Scheduling Mapping Select enrichment attributes Review

Mapping

Filter fields

+ Add new mapping (Beta) Add calculated field Clear all mappings

SOURCE FIELD	TARGET FIELD	MANDATORY KEY	DEDUPLICATION KEY
xdm: person.name.firstName	Attribute: person.name.firstName	☐	☐
xdm: person.name.lastName	Attribute: person.name.lastName	☐	☐
xdm: personalEmail.address	Attribute: personalEmail.address	☐	☒
xdm: segmentMembership.segmentName	Attribute: segmentMembership.status	☐	☐
xdm: segmentMembership.segmentName	Attribute: segmentMembership.lastModified	☐	☐

In the following mapping step, you can **select enrichment attributes** based on audience field mappings in the federated audience composition.

click the pencil (edit) icon to view the pre-selected attributes

Adobe Experience Platform

Search Experience Cloud (Alt + /)

Adobe Americas POT 5 Dev POT5 FAC HOL 2 (VA7)

Destinations > Activate destination

Select audiences Scheduling Mapping Select enrichment attributes Review

Select the enrichment attributes to export for each external audience.

☐ Exclude enrichment attributes

AUDIENCE NAME	PROFILE COUNT	ENRICHMENT ATTRIBUTES
SecureFinancial Customers - No Loans, Good Credit ...	308	EMAIL, SM10510_CURRENTPRODUCTS

Select enrichment attributes for SecureFinancial Customers - No Loans, Good Credit SS

Filter enrichment attributes

 Add enrichment attribute  Clear all attributes

SCHEMA FIELD

EMAIL



*



SM10510_CURRENTPRODUCTS



Cancel

Save and close

Review your audience mapping and hit **Finish**

Exp League: <https://experienceleague.adobe.com/en/docs/federated-audience-composition/using/compositions/create-composition/create-composition>

7. Build a Journey with Federated Audience Data

[Hands on keyboard!]

Build a journey in Adobe Journey Optimizer with a Federated Audience

In this next section, you'll learn how a federated audience can be used in journeys within AJO. This includes using queried attributes from Federated Audience Composition to personalize messaging.

For the next lab exercise, you will

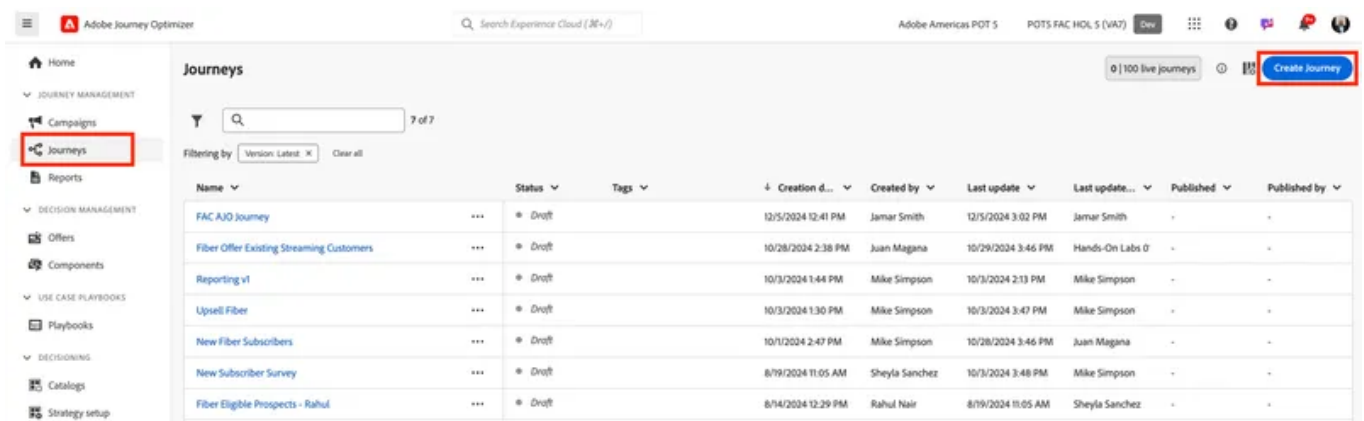
- Build a journey using a federated audience
- Personalize email using federated enrichment attributes

To continue on the SecurFinancial customer story and solve for the customer retargeting and personalization use case, we will orchestrate a journey for prequalified customers. The goal is to send a personalized email based on attributes federated from SecurFinancial's data warehouse.

If you did not finish building your federated audience, no problem! Continue reading to build your journey using an existing federated audience.

Build a Journey with a Read Audience

Navigate to **Journeys** portal, click the **Create Journey** button



The screenshot shows the Adobe Journey Optimizer (AJO) interface. On the left is a navigation sidebar with options like Home, Journeys Management, Campaigns, Journeys (highlighted with a red box), Reports, Decision Management, Offers, Components, Use Case Playbooks, Playbooks, Decisioning, Catalogs, and Strategy Setup. The main area displays a table of Journeys. At the top right of the main area, there is a 'Create Journey' button highlighted with a red box. The table lists several journeys, all with a status of 'Draft'.

Name	Status	Tags	Creation d...	Created by	Last update	Last update...	Published	Published by
FAC AJO Journey	Draft		12/5/2024 12:41 PM	Jamar Smith	12/5/2024 3:02 PM	Jamar Smith	-	-
Fiber Offer Existing Streaming Customers	Draft		10/28/2024 2:38 PM	Juan Magana	10/29/2024 3:46 PM	Hands-On Labs 0	-	-
Reporting v1	Draft		10/3/2024 1:44 PM	Mike Simpson	10/3/2024 2:13 PM	Mike Simpson	-	-
Upsell Fiber	Draft		10/3/2024 1:30 PM	Mike Simpson	10/3/2024 3:47 PM	Mike Simpson	-	-
New Fiber Subscribers	Draft		10/1/2024 2:47 PM	Mike Simpson	10/28/2024 3:46 PM	Juan Magana	-	-
New Subscriber Survey	Draft		8/19/2024 11:05 AM	Sheyla Sanchez	10/3/2024 3:48 PM	Mike Simpson	-	-
Fiber Eligible Prospects - Rahul	Draft		8/14/2024 12:29 PM	Rahul Nair	8/19/2024 11:05 AM	Sheyla Sanchez	-	-

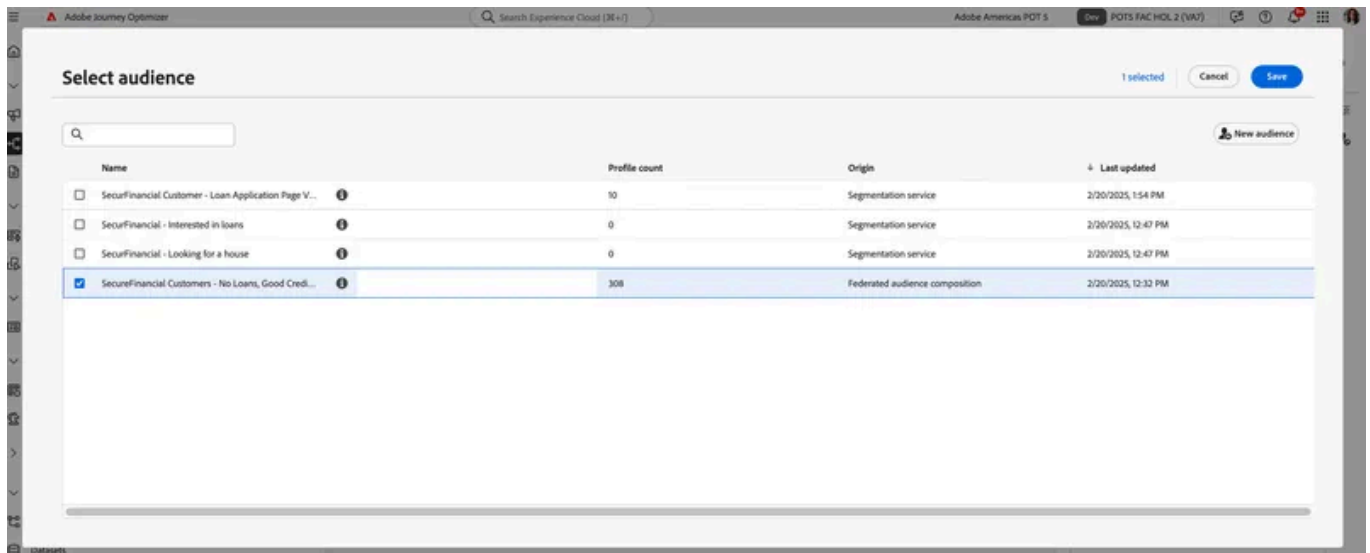
Update the Journey Properties with a new name **SecurFinancial - Home Loan Offer -** and ***add your lab user ID***

Click on **Orchestration** then drag and drop the **Read audience** tile to the canvas

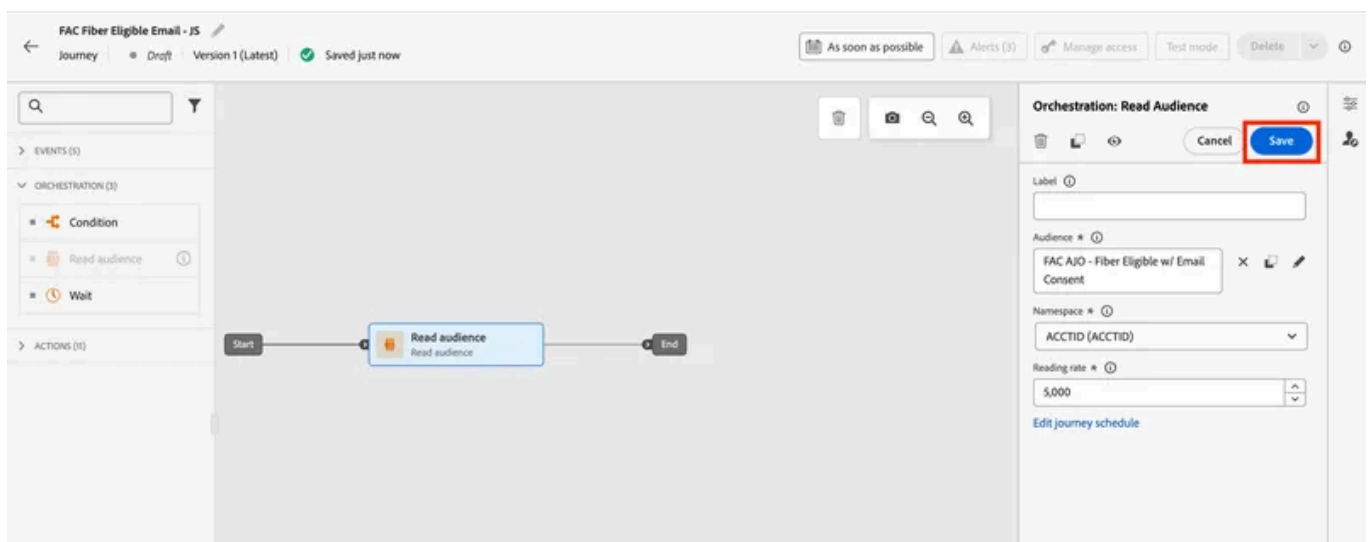
Then click on the pencil icon next to **Audience** box on the right side of the screen

In the search bar, search for **SecurFinancial Customers - No Loans, Good Credit**

then click **Save**



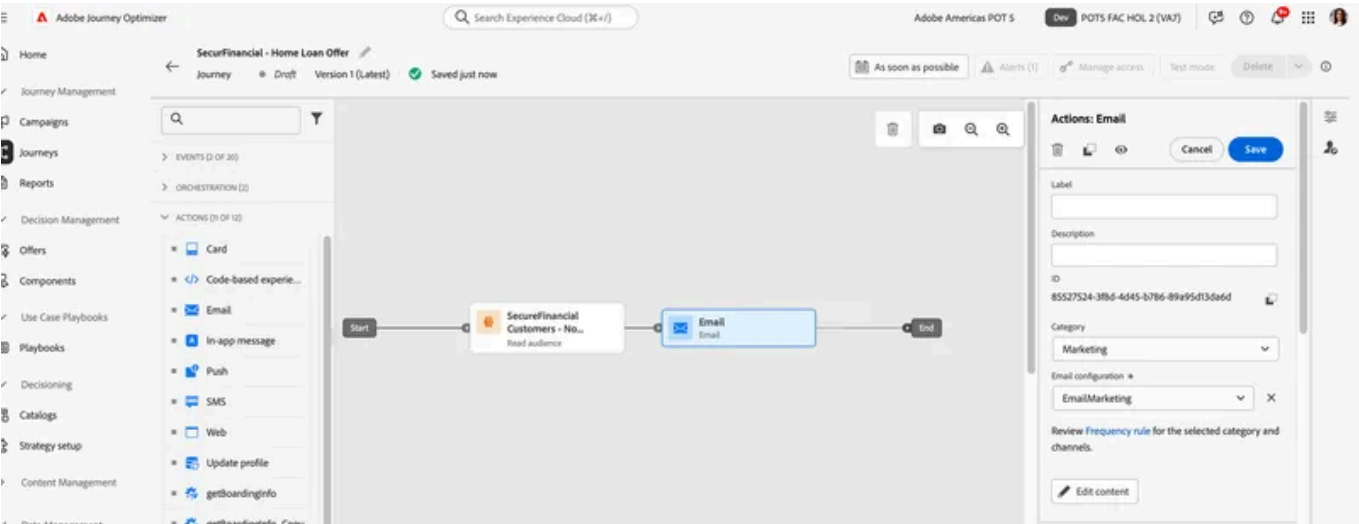
Leave all the settings as default in the right side menu and then click **Save**



Personalize Email

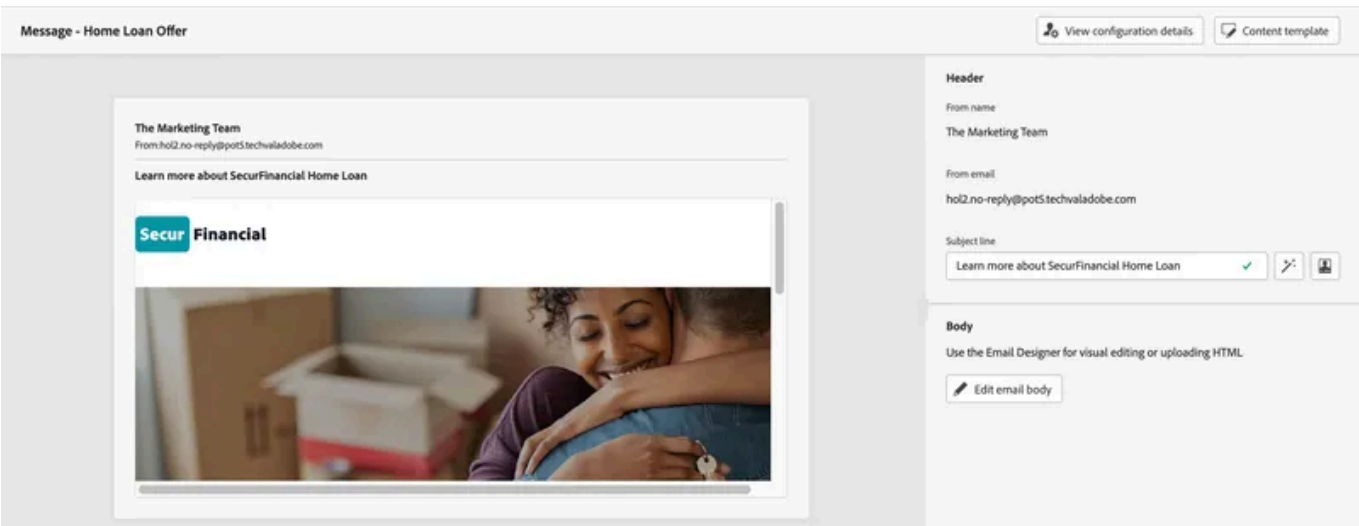
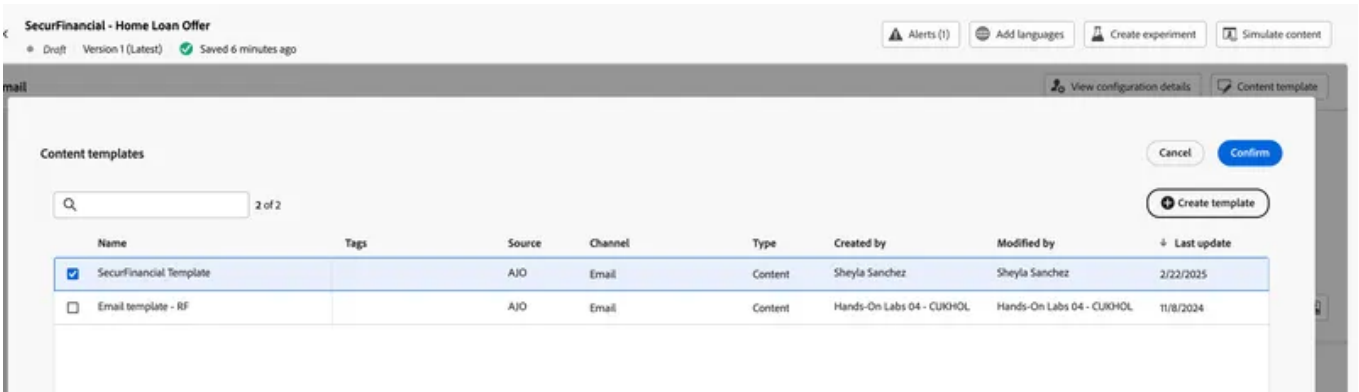
Click on **Actions** and then click and drag the **Email** tile to the canvas

On the right side menu, click on **Email configuration** and select **EmailMarketing**. Then click on **Edit content**



In the subject line add **Learn more about SecurFinancial Home Loan**. Then click on **Edit email body**

Click the Content template button in top right corner. Find and select **SecureFinancial Template** then click **Confirm**



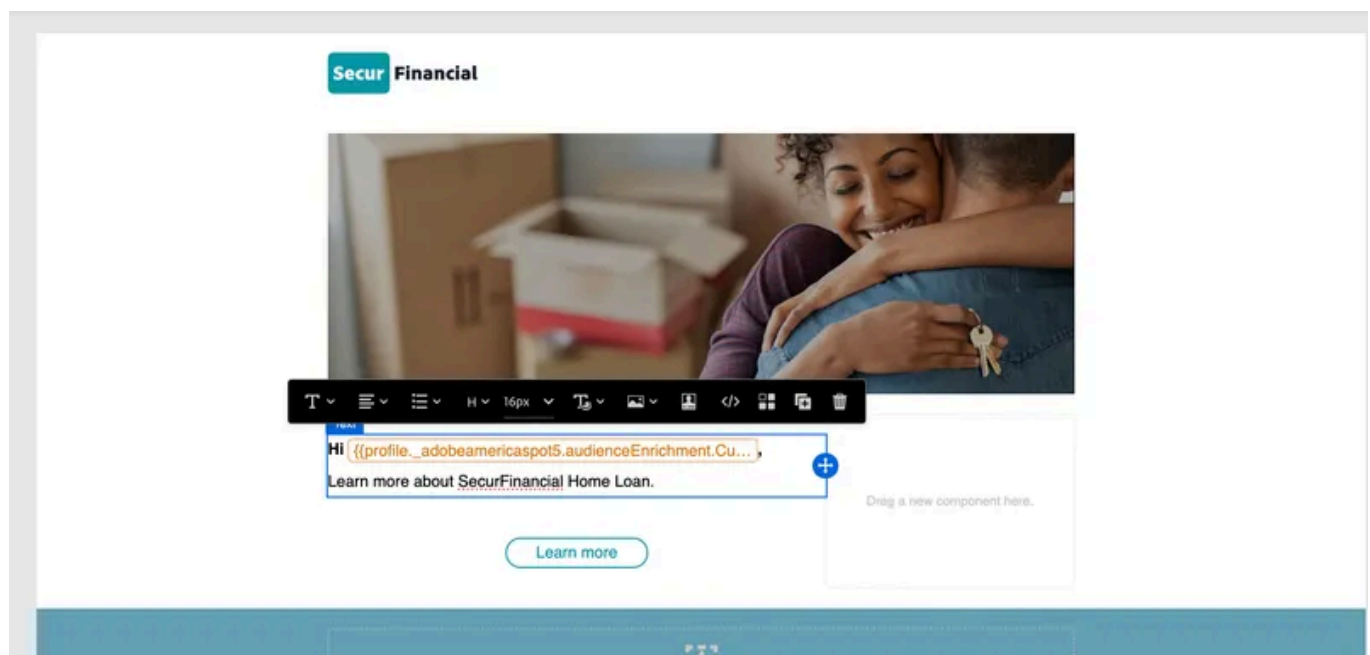
Review the template and click **Use Template**

- You will now be in the Email Designer. Hover over the `{{profile.person.name.firstName}}` macro and click the personalization avatar
- In the personalization window, drill down to the following folder path

_adobeamericaspot5 > audienceEnrichment > CustomerAudienceUpload

- Click into the read audience folder
- The enrichment attributes from your federated audience can be found here
- Select the **First Name** attribute to the expression builder
- The email will dynamically express the first name value of the customer to personalize the email
- Click **Save**

Now that the first name personalization has been added, add **Hi**, in front of the personalization variable. Then click **Save**



Click on the **Back button** twice and this will take you back to the journey canvas. Then in Action: Email menu to the right, click **Save**



Congratulations, you have created a journey in AJO using a federated audience and federated enrichment attributes. We will not publish this journey, but it has been saved.

8. Audience Enrichment Demo

[Hands off keyboard!]

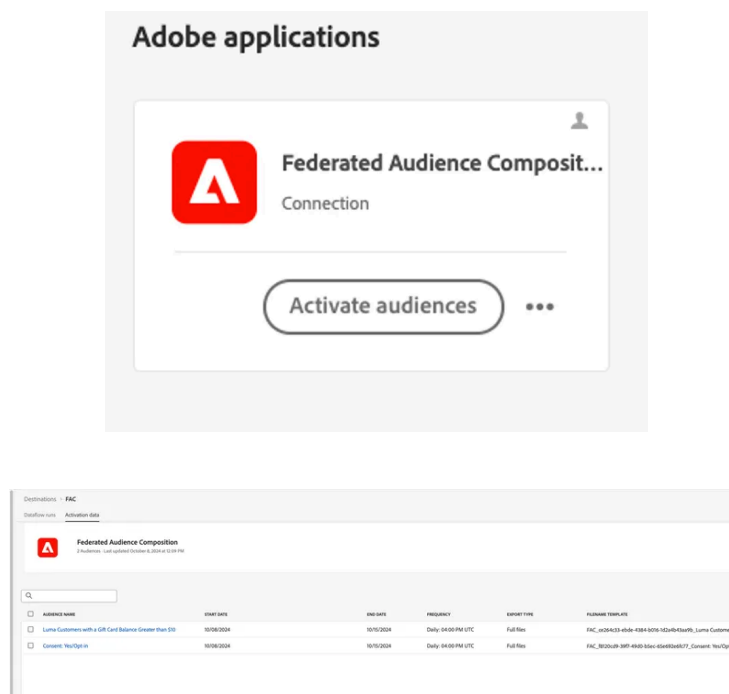
Federated Audience Composition enables you to enrich existing audiences in Adobe Experience Platform by utilizing composed audience data that has been federated from the enterprise data warehouse. The federated data will not persist in Adobe Experience Platform customer profiles.

Preapproved SecurFinancial Loan Page Visitor

There are two ways to enrich a Federated Audience Composition

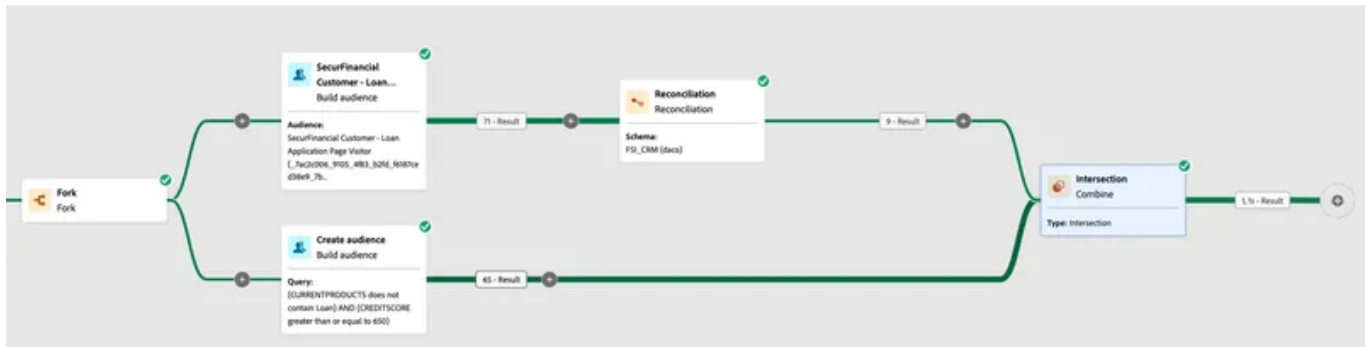
1. Reading an AEP audience within a federated composition

1. Map AEP audience to the **Federated Audience Composition destination**
2. Build your composition with your the mapped audience as a **Read audience**
3. **Reconcile** the identities in your read audience, to join with federated data



In this first example, we'll use the **SecurFinancial Loan Application Page Visitor** audience stored in AEP's Profile Service to start our federated composition. We will enrich the

audience using federated data in Snowflake to determine pre-approval based on credit score and loan activity (Snowflake).



2. Enriching Experience Platform audience rule with a federated audience

1. **Save** and **Start** your federated audience composition. Once the composition has run, your federated audience will appear in the audience portal
2. Build an **audience rule** using profile attributes and experience events from Profile Service and using your federated audience

In this example, we'll use the federated audience queried with credit score and loan activity to enrich the behavioral audience of loan application web page visitors

By evaluating this audience on the **Edge**, we can instantaneously retarget the preapproved loan application web page visitors with personalized offers on the site

Audiences > SecurFinancial Preapproved Loan Application Page Visitor > Edit audience

Fields | Attributes | Events | Audiences

Attributes

Include

- SecureFinancial Customers - No Loans, Good Credit \$5

Includes the audience

Events

Any time

Any 1 Rule

Event Rules

Include

At least 1

Any 1 where:

- View Name contains loan

Case sensitive

Audience properties

0 QUALIFIED PROFILES | 0 ESTIMATED PROFILES

Last updated: 03/03/2025 8:05 pm

0% OF TOTAL

Refresh estimate

View profiles

Code view

Apply access labels

Name: SecurFinancial Preapproved Loan Applicat...

Description

Tags

Lifecycle state: Published

Evaluation method: Edge

9. Profile Enrichment Demo

[Hands off keyboard!]

The **Save Profiles** activity allows you to enrich Adobe Experience Platform profiles with data federated from external warehouses.

This activity is typically used to enhance customer profiles by bringing in additional attributes and insights without physically moving or duplicating the data into the platform.

SecurFinancial would like to enrich its Adobe Experience Platform (AEP) customer profiles with key financial attributes—current products held, account value, and products of interest—stored in their external data warehouse (e.g., Snowflake). This enables richer, consent-based personalization across marketing channels without copying data. By enriching profiles, SecurFinancial gains up-to-date insight into customers—e.g., credit score changes, average account balances—triggering campaigns like "Offer loan upgrade to customers with credit score >700 and balance >\$50k". All without duplicating sensitive warehouse data.

Build Profile Enrichment via Save Profiles Activity

1. Prerequisites

- A live federated database connection
- An XDM schema and dataset in AEP to receive attributes
- Warehouse table with fields
- The customer ID corresponds to a known identity namespace in AEP

2. Define AEP Schema and Identity [demo]

- In AEP → Schemas, choose or create a schema:
 - Primary identity: email
 - Add fields: creditScore, accountValue, currentProducts, productsOfInterest

3. Create a Federated Composition

- Go to *Experience Platform* → *Federated Audience Composition* → *Compositions*.
- Create new composition

4. Add and Configure Save Profiles Activity

1. Drag the **Save Profiles** activity onto the canvas.
2. Label it uniquely (e.g., *SF-Enrich-Profiles*).
3. Select the target schema
4. Set the primary identity field
5. **+ Add attributes** for mapping:
 - Source ⇒ warehouse field; Destination ⇒ schema field:
 - credit_score → creditScore
 - account_value → accountValue
 - current_products → currentProducts
 - product_interest → productsOfInterest
6. **Enable incremental updates** to fetch only changed/new rows since the last run.
7. Click **Start** to run and test enrichment.

5. Validate Outputs in AEP

- Navigate to *Schemas & Datasets* and open the profile-enabled dataset.
- Check that sample profiles include the new attribute values.

6. Leverage Enriched Profiles

- Enriched profiles available in Real-Time CDP and Journey Optimizer.
- Example campaign:
 - **Segment rule:** creditScore >= 650 and accountValue >= 50000 and productsOfInterest includes 'home loan'
 - **Activation:** push audience to email or ad platforms for targeted campaign.

10. Federated Audience Composition (FAC) Use Case Scenarios

Product documentations & Availability

Federated Audience Composition (FAC) in Experience Platform enables you to access and create audiences with corresponding high-value attributes from enterprise data warehouses, which enrich and supplement the real-time customer profile and audiences in Experience Platform for improved segmentation, targeting, activation, and delivery of impactful customer experiences. Using Federated Audience Composition, a virtual database is created by linking remote databases through metadata. This approach simplifies access, reduces duplication, and enhances end-user experience.

[Federated Audience Composition \(FAC\) Overview](#)

[Federated Audience Composition \(FAC\) Tutorial](#)

[Getting started with audience composition](#)

[Federated Audience Composition FAQ](#)

Federated Audience Composition feature is enabled at sandbox level.

Enabling this feature creates product profile, of the format `ACP_FAC - <sandbox> - admin`, in Adobe Experience Platform product. Users need to be added to this product profile, to be able to access feature.

Retail scenario

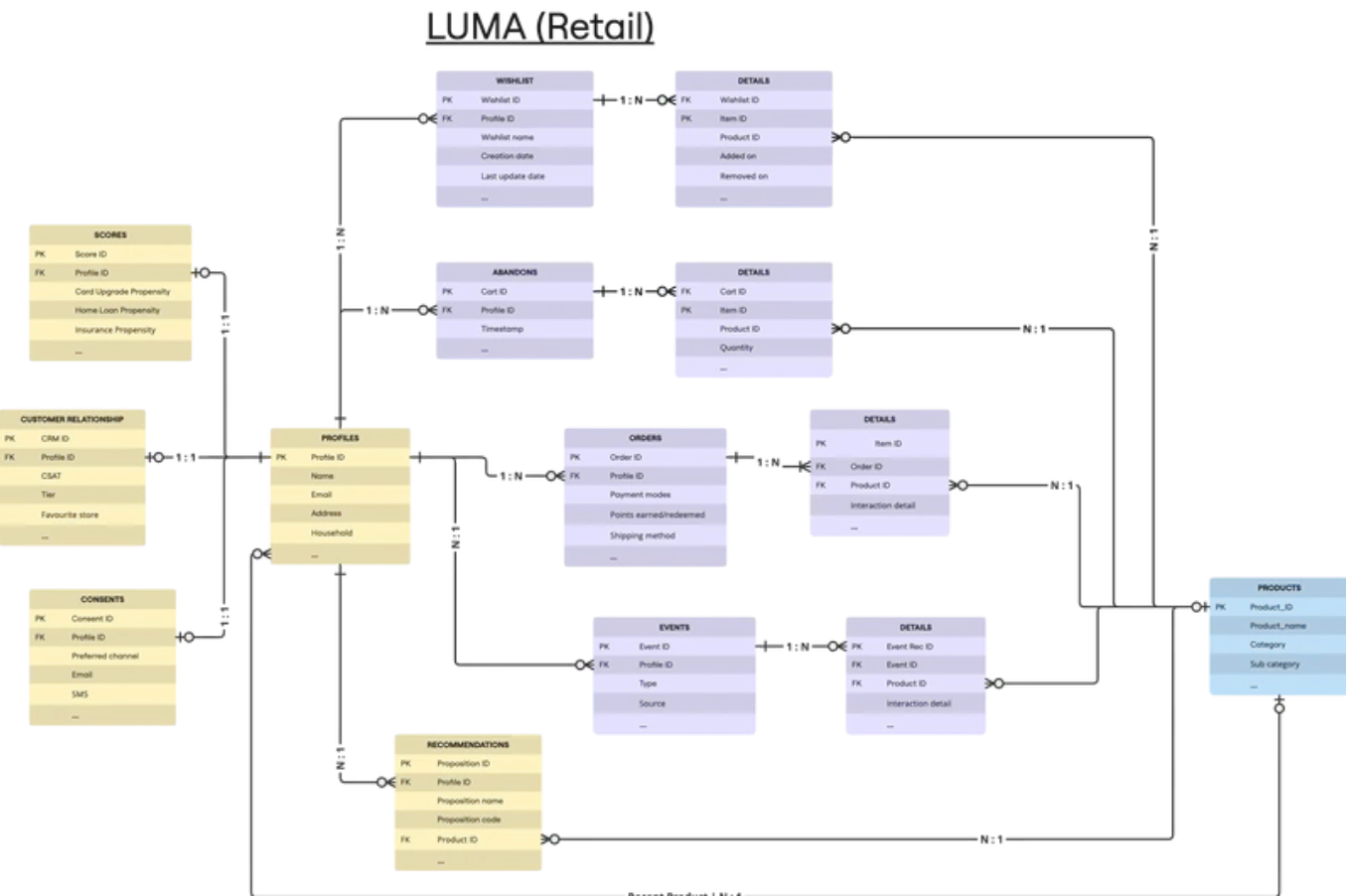
Database connection

Name: Luma Datasource

Type: Snowflake

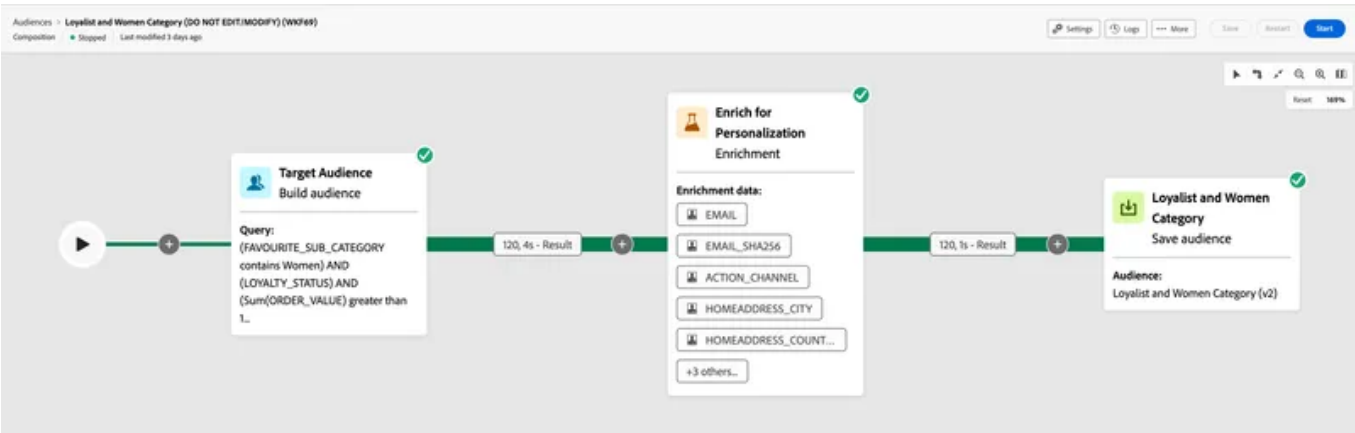
Entities & Relationships

Luma - Data Model (v2.0)



Luma (Retail) Data Model v2.0

Compositions



Identity: Email

Result audience name: Loyalist and Women Category (v2)

Scheduled: No

Highlight: Enrichment

- "Favourite Sub-Category" (CRM) contains "Women"
- "Loyalty status" (CRM) is True
- Having "Order value" > \$1,500

Create audience:

Customers whose category affinity is equal to women, and they are signed up for the loyalty program.

Use-case 1: Loyalist and Women Category



Identity: Email

Result audience name: Birthday this month - Active orders, Birthday this month - No active orders

Scheduled: No

Highlight: Conditional split, Enrichment

- Birthdate falls in current month
- "Loyalty status" (CRM) is True

Create audience:

Create audience of customers who have a birthday this month, if they have an active order, target them for a birthday offer that references their order status. However, if they do not

have an active order, just target them with a birthday offer.

Use-case 2: Birthday Month offers



Identity: Email

Result audience name: Luma Prime Member with Wishlist, Luma Prime Member with Recommendation

Scheduled: No

Highlight: Conditional split, Enrichment

- Total order value greater than \$1000
- Based on linked "Wishlist" items split into two categories of audience.

Create audience:

Prior Order History is greater or equal to \$1000 and has consented to marketing communications. Additionally, with enrichment, we can also couple together this output with, "does a Wishlist exist?" for this specific user – this could warrant retargeting or offers being sent to that user when an item / product on their wish list changes price or stock levels.

Use-case 3: Customer Avg. Order > \$1000

FSI Scenario

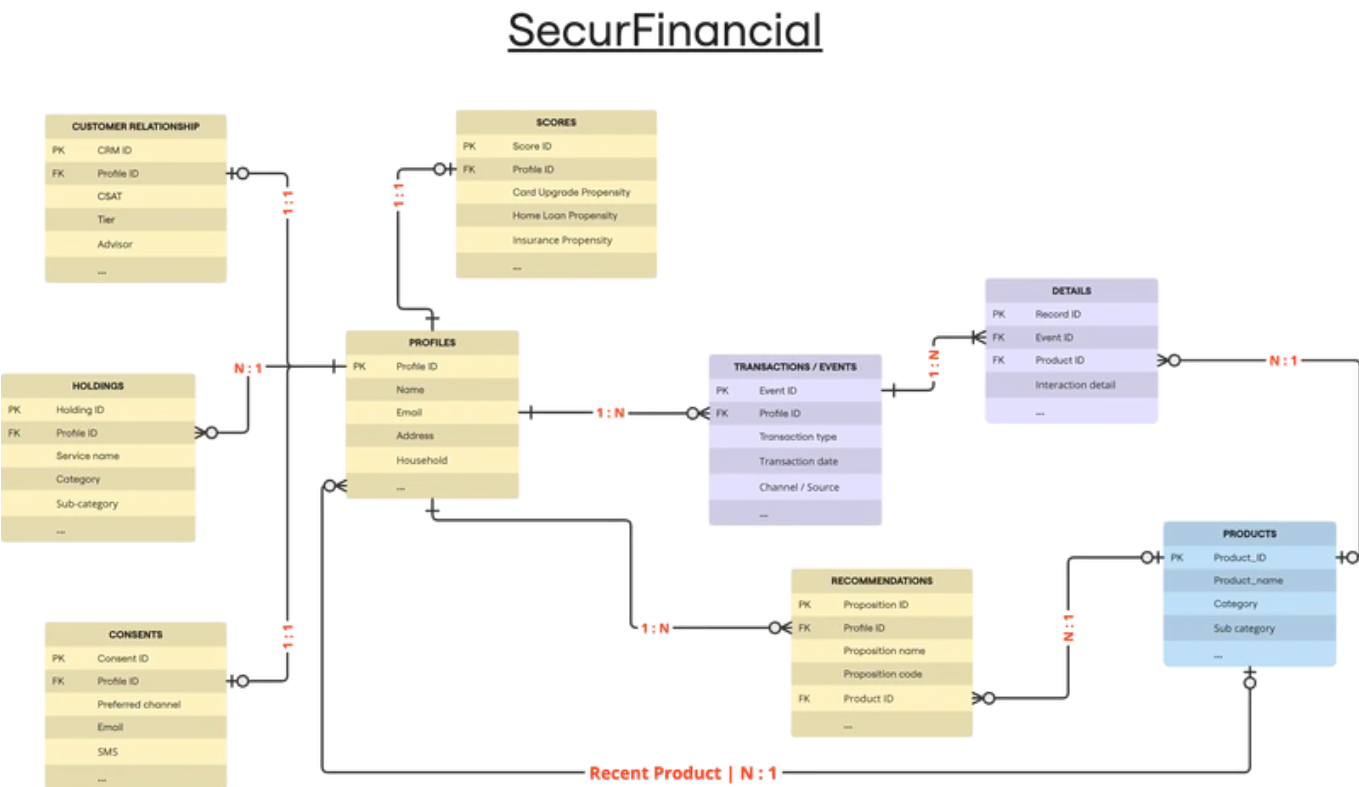
Database connection

Name: SecurFinancial Datasource

Type: Snowflake

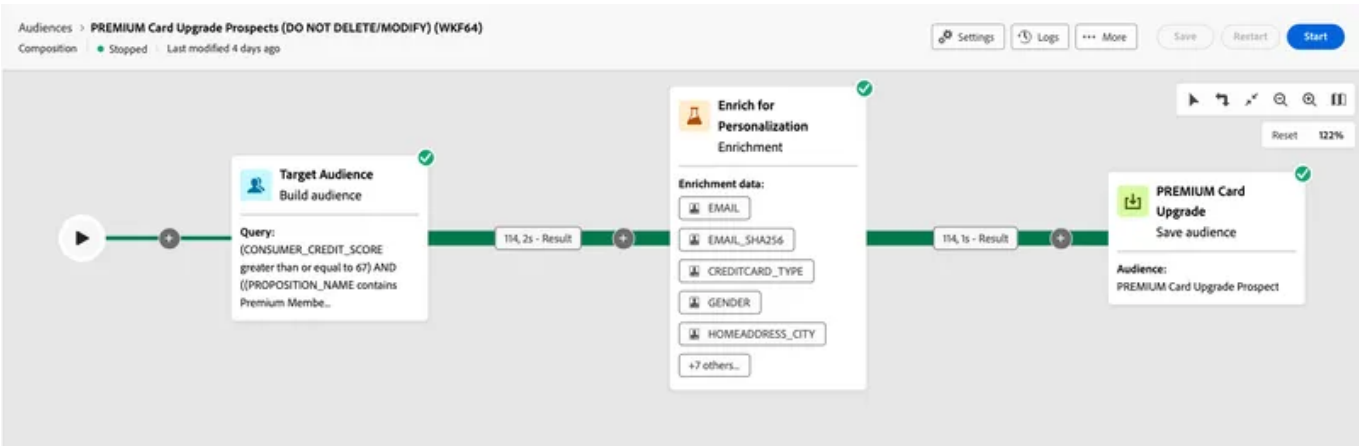
Entities & Relationships

SecurFinancial - Data Model (v2.0)



SecurFinancial (FSI) Data Model v2.0

Compositions



Identity: Email

Result audience name: PREMIUM Card Upgrade Prospect

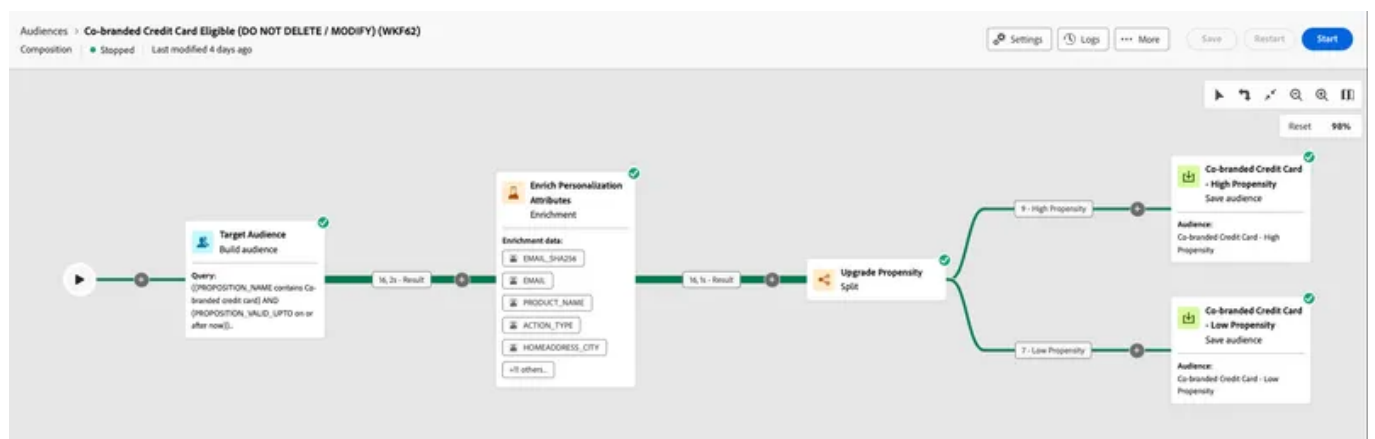
Scheduled: Yes, Once on weekdays

- "Consumer Credit score" (CRM) greater than 67
- "Recommendation" name contains "Premium Membership"
- "Recommendation" is valid i.e. "Valid up to" date is greater than today.

Create audience:

Customers segment for premium card feature promotion.

Use-case 1: PREMIUM Card Upgrade Prospects



Identity: Email

Result audience name: Co-branded Credit Card - High Propensity, Co-branded Credit Card - Low Propensity

Scheduled: Yes, Once on weekdays

- "Recommendation" contains "Co-branded credit card"
- "Recommendation" is valid i.e. "Valid up to" date is greater than today.
- Recent transactions of type "Request Card Replacement", "Apply Credit Card" etc. has product category "Credit Cards"

Create audience:

Pre- approved for a co-branded credit card using the event types of either transaction, payment, or information

Use-case 2: Co-branded Credit Card Eligibe

Telco scenario

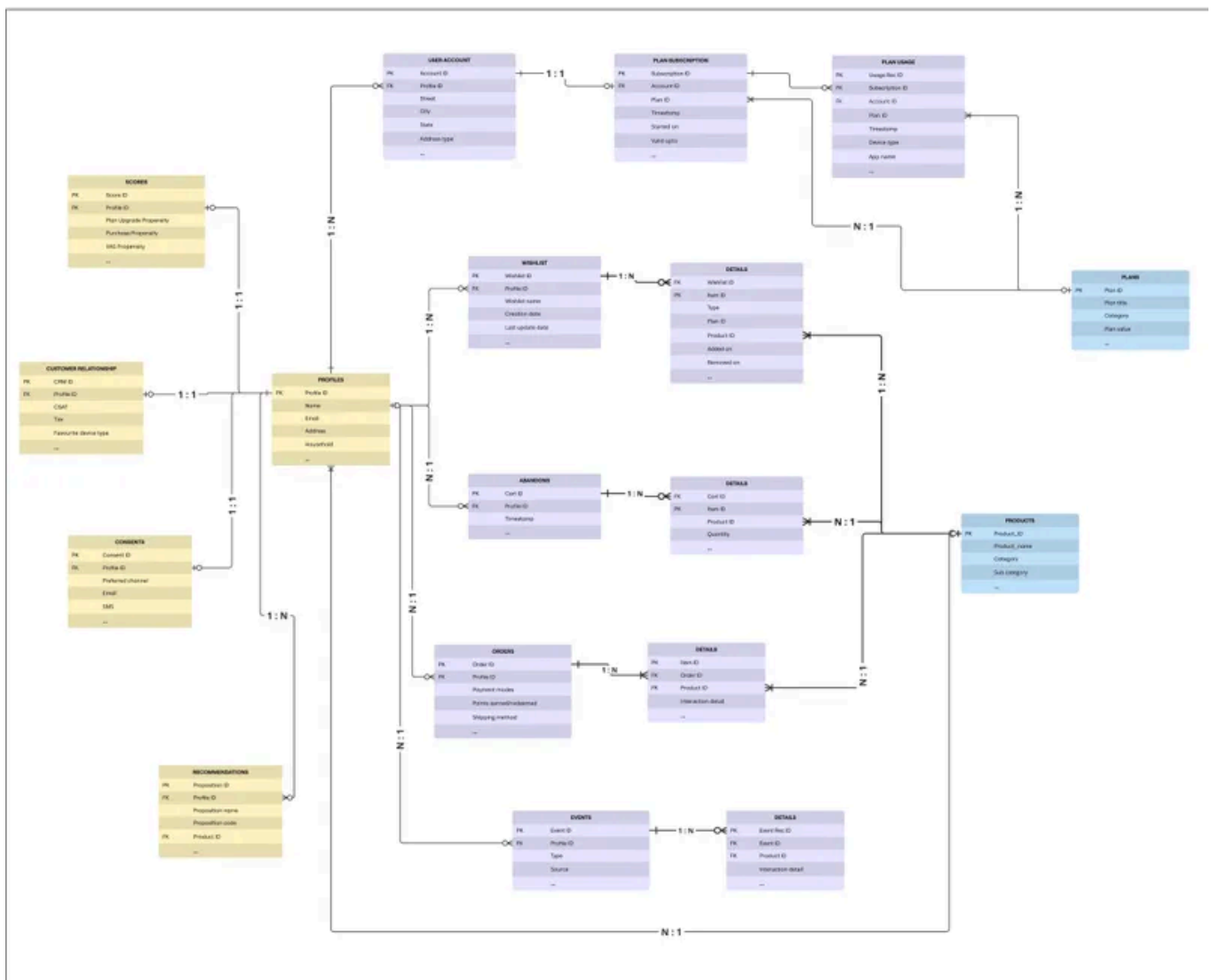
Database connection

Name: CitiSignal Datasource

Type: Snowflake

Entities & Relationships

❏ CitiSignal - Data Model (v2.0)



CitiSignal (Telco) Data Model

Compositions



CitiSignal - Cross sell (Transaction based) Workflow

- Target profiles with marketing consent.
- Enrich filtered audience with personalize attributes, such as, eligibility for fibre connection, propensity for device upgrade, number of devices owned, (aggregate) quarterly average order value etc.

- **Split the audience:**

- High Pre-paid Transactions:

```
(``[Engagements/Items/Product/@PRODUCT_CATEGORY]`` equal to  
``Subscription Plans``) AND  
(``[Engagements/Items/Product/@PRODUCT_SUB_CATEGORY]`` included in  
(``Prepaid Plans, Data Add-ons, Entertainment Add-ons``)) AND  
(``[Engagements/@EVENT_DATE]`` greater than or equal to ``6 months  
ago``) AND (Sum(``[Engagements/@TRANSACTION_AMOUNT]``) greater than  
``500``)
```

- High Roaming Transactions:

```
(``[Engagements/Items/Product/@PRODUCT_CATEGORY]`` equal to  
``Subscription Plans``) AND  
(``[Engagements/Items/Product/@PRODUCT_SUB_CATEGORY]`` equal to  
``Mobile Roaming Plans``) AND (``[Engagements/@EVENT_DATE]`` greater  
than or equal to ``6 months ago``) AND  
(Count(``[Engagements/@EVENT_ID]``) greater than or equal to ``3``)
```

- High Broadband Transactions:

```
(``[Engagements/Items/Product/@PRODUCT_CATEGORY]`` equal to  
``Subscription Plans``) AND  
(``[Engagements/Items/Product/@PRODUCT_SUB_CATEGORY]`` like  
``%Broadband%Plans%``) AND (``[Engagements/@EVENT_DATE]`` greater  
than or equal to ``6 months ago``) AND  
(Sum(``[Engagements/@TRANSACTION_AMOUNT]``) greater than ``1500``)
```

- Complement:

For rest of the target audience, check if they are eligible for fibre connection and have fibre connection related plans in last 6 months.

Split condition:

```
(``[FIBRE_CONNECTION_ELIGIBLE]`` equal to ``1``) AND  
(``[Wishlist/Items/Product/@PRODUCT_CATEGORY]`` equal to  
``Subscription Plans``) AND  
(``[Wishlist/Items/Product/@PRODUCT_SUB_CATEGORY]`` contains  
``Fibre``) AND (``[Wishlist/@CREATED_DATE]`` greater than or equal to  
``6 months ago``)
```

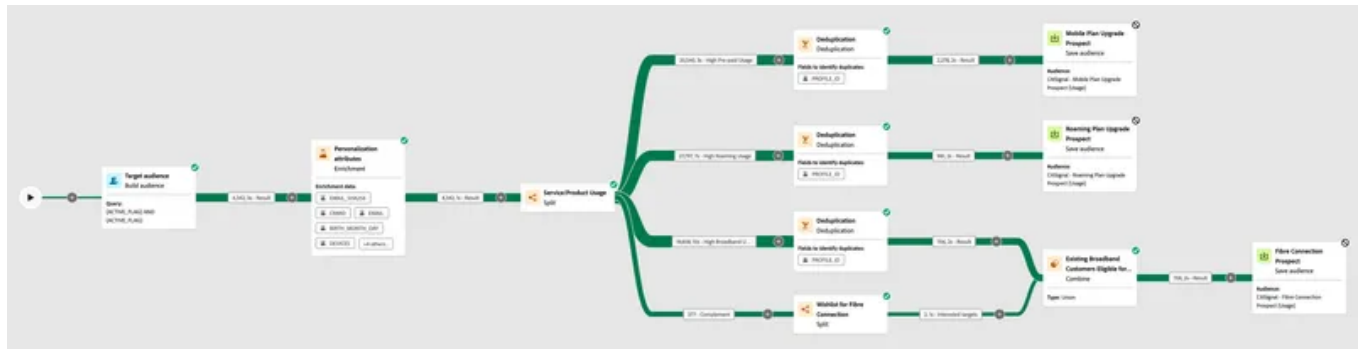
- **Result audiences:** CitiSignal - Mobile Plan Upgrade Prospect (Transactions), CitiSignal - Roaming Plan Upgrade Prospect (Transactions), CitiSignal - Fibre Connection Prospect (Transactions)

- **Identity:** Email

Create audience:

Segment customers based on purchase / transactions on their subscription plans.

Use-case 1: CitiSignal - Cross sell (Transaction based)



CitiSignal - Cross sell (Plan usage based) Workflow

- Target profiles with active Account and active Subscription.
- Enrich filtered audience with personalize attributes, such as, eligibility for fibre connection, propensity for device upgrade, number of devices owned, (*aggregate*) total number of devices associated to active accounts etc.

- **Split the audience:**

- High Pre-paid Usage:

```
((`[Accounts/Subscription/Plan/@PLAN_TYPE]` included in (`Talk-Time & Data, VAS`)) AND (`[Accounts/Subscription/Plan/@PLAN_SUB_TYPE]` included in (`Mobile Bundle Plans, Mobile Talk-Time Plans, Prepaid Plans, Data Add-ons`)) AND ((`[Accounts/Subscription/Usage/@USAGE_DATE]` on or after `last month`) AND ((Sum(`[Accounts/Subscription/Usage/@DATA_USAGE_MB]`) greater than or equal to `10,000`) AND (Sum(`[Accounts/Subscription/Usage/@VOICE_USAGE_DURATION_SECS]`) greater than or equal to `45,000`)))
```

- High Roaming Usage:

```
((`[Accounts/Subscription/Plan/@PLAN_TYPE]` included in (`Talk-Time & Data, VAS`)) AND (`[Accounts/Subscription/Plan/@PLAN_SUB_TYPE]` included in (`Mobile Roaming Plans, Data Add-ons, Entertainment Add-ons`)) AND ((`[Accounts/Subscription/Usage/@USAGE_DATE]` on or after `3 months ago`) AND ((Sum(`[Accounts/Subscription/Usage/@DATA_USAGE_MB]`) greater than
```

or equal to ``15,000``) AND

(Sum(``[Accounts/Subscription/Usage/@VOICE\_USAGE\_DURATION\_SECS]``)
greater than or equal to ``30,000``)))

- High Broadband Usage:

(``[Accounts/Subscription/Plan/@PLAN\_TYPE]`` included in (``Network,
Satellite services, VAS``)) AND

(``[Accounts/Subscription/Plan/@PLAN\_SUB\_TYPE]`` included in
(``Broadband & Media Plans, Broadband Plans, Private LTE Network,
Satellite Broadband Plans, Entertainment Add-ons, Media &
Entertainment Plans``)) AND

(``[Accounts/Subscription/Usage/@USAGE\_DATE]`` on or after ``3
months ago``) AND

(Sum(``[Accounts/Subscription/Usage/@DATA\_USAGE\_MB]``) greater than or
equal to ``10,000``)

- Complement:

For rest of the target audience, check if they are eligible for fibre connection
and have fibre connection related plans in last 6 months.

Split condition:

(``[FIBRE\_CONNECTION\_ELIGIBLE]`` equal to ``1``) AND

(``[Wishlist/Items/Product/@PRODUCT\_CATEGORY]`` equal to
``Subscription Plans``) AND

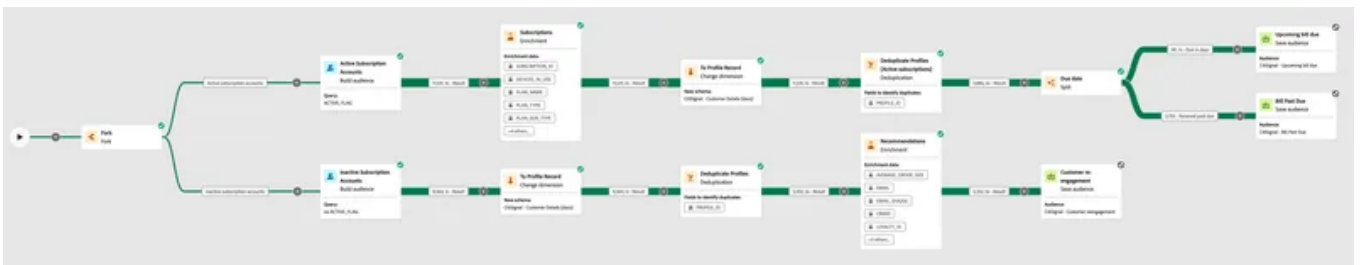
(``[Wishlist/Items/Product/@PRODUCT\_SUB\_CATEGORY]`` contains
``Fibre``) AND (``[Wishlist/@CREATED\_DATE]`` greater than or equal to
``6 months ago``)

- **Result audiences:** CitiSignal - Mobile Plan Upgrade Prospect (Usage), CitiSignal - Roaming Plan Upgrade Prospect (Usage), CitiSignal - Fibre Connection Prospect (Usage)
- **Identity:** Email

Create audience:

Segment customers based on subscribed plan usage.

Use-case 2: CitiSignal - Cross sell (Plan usage based)



CitiSignal - Plan subscription reminder Workflow

- Separate branches to select target profiles based on active subscription account and inactive subscription account.
- Enrich filtered audience with personalize attributes, such as, eligibility for fibre connection, propensity for device upgrade, number of devices, (*collection*) recommendations etc. Must also include number of days due `DaysDiff(VALID_UPTO(target/Subscription/@VALID_UPTO), GetDate())`
- Convert the result to Profile record schema and perform deduplication based on `PROFILE_ID` / `EMAIL` / `EMAIL_SHA256`
- **Split the audience:**
 - Split the active account users by renewal due date:
(Assuming the `NUM_OF_DAYS_DUE` already added in enrichment activity)
`(`NUM_OF_DAYS_DUE` greater than 0) AND (`NUM_OF_DAYS_DUE` less than 15)`
 - Complement:
For rest of the target audience saved to experience platform
- In the **inactive account branch**, include **recommendation** using enrichment activity.
- **Result audiences:** CitiSignal - Upcoming bill due, CitiSignal - Bill Past Due, CitiSignal - Customer reengagement
- **Identity:** Email

Create audience:

Segment customers based on renewal of subscription plans & re-engage with customers using available recommendations.

Use-case 3: CitiSignal - Plan subscription reminder

Healthcare scenario

Database connection

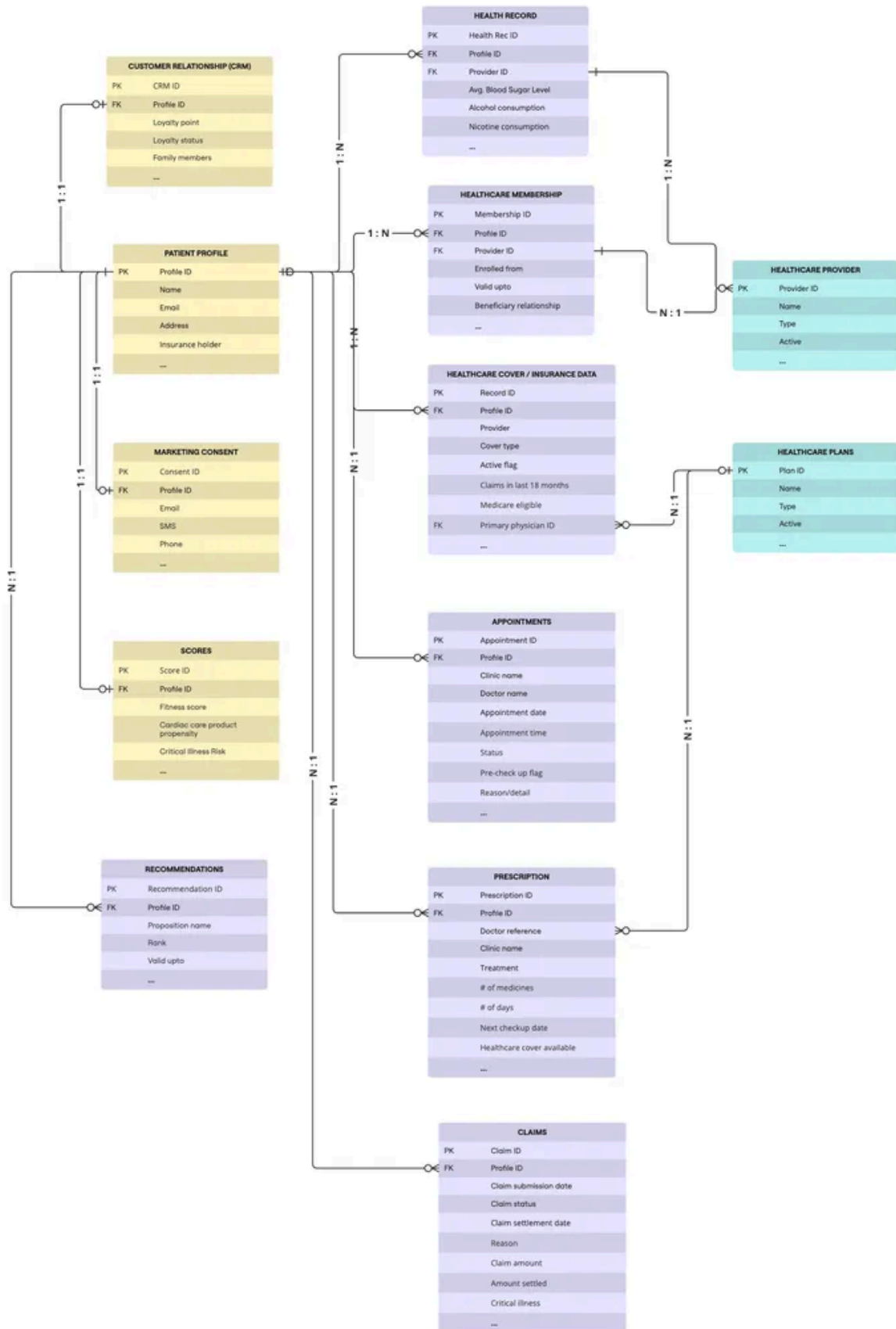
Name: Healthcare Datasource

Type: Snowflake

Entities & Relationships

☐ Healthcare - Data Model

HEALTHCARE DATA MODEL



Healthcare Data Model

Compositions



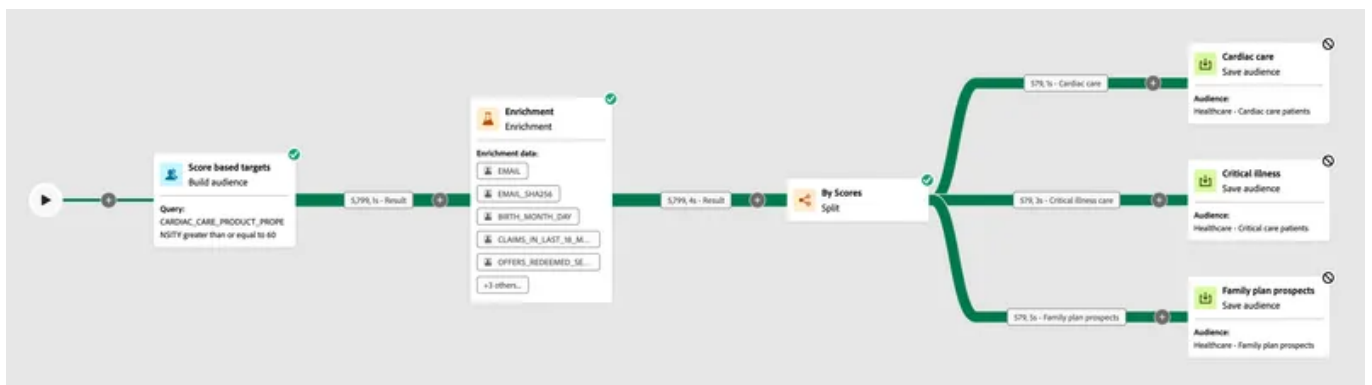
Healthcare prescription reminder

- Target profiles, who have made a purchase in last 3 months and **marketing consent to "Share" data for personalization**.
- Enrich filtered audience with personalize attributes, such as, claims in last few months, offers redeemed, translate refill reminder (simple expression), number of checkups (aggregated value).
- Deduplicate target audience by prescription refill due days (i.e. refill due recent)
- **Split the audience:**
 - Refill due:
REFILL_DUE_IN_DAYS greater than 0
 - Refill past due:
REFILL_DUE_IN_DAYS less than 0
- **Result audiences:** Healthcare - Prescription due for refill, Healthcare - Prescription past due
- **Identity:** Email

Create audience:

Segment customers based on prescription due in few days or past due and provided consent to share data for personalisation.

Use-case 1: Healthcare - Prescription reminder

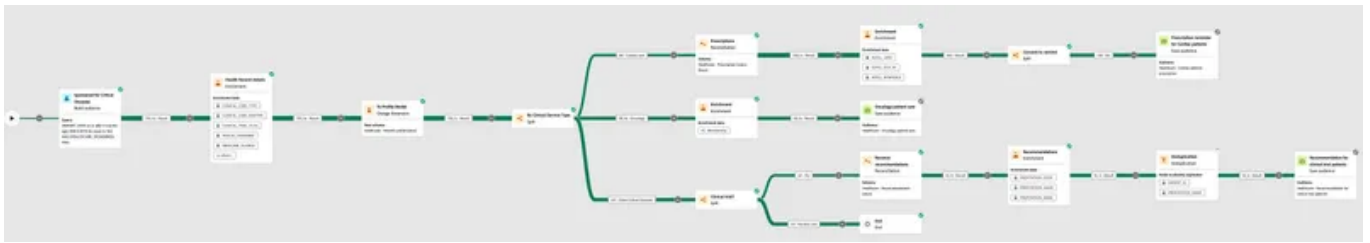


- Target profiles with scores related cardiac care, critical illness risk, propensity for healthcare family plans and **marketing consent to "Share" data for personalization**.
- Enrich filtered audience with personalize attributes, such as, claims in last few months, offers redeemed, number of prescriptions in last 3 months (aggregated value).
- **Split the audience:**
 - Cardiac care:
CARDIAC_CARE_PRODUCT_PROPE NSITY greater than or equal to 80
 - Critical illness care:
CRITICAL_ILLNESS_RISK greater than or equal to 40
 - Family plan prospects:
HEALTHCARE_FAMILY_PLAN_PROPE NSITY greater than or equal to 50
- **Result audiences:** Healthcare - Cardiac care patients, Healthcare - Critical care patients, Healthcare - Family plan prospects
- **Identity:** Email

Create audience:

Segment customers based on healthcare industry related scores and provided consent to share data for personalisation.

Use-case 2: Healthcare - Scorebased segment



Critical care audiences

- Target profiles with health records in last 3 months, sponsored healthcare plan, identified with illness (*categorised as critical diseases*) and **marketing consent to "Share" data for personalization**.
(`REPORT_DATE` on or after `3 months ago`) AND (`CRITICAL` equal to `Yes`) AND (`HEALTHCARE_SPONSERED` is `true`) AND (`SHARE` is `true`)
- Change the resultant target dimension to match with Profile schema.
- Split the audience:**
 - Cardiac care:
`CARDIAC_CARE_TYPE` included in `Cardiology, Pulmonology`
 - Oncology care:
`CARDIAC_CARE_TYPE` included in `Oncology, Emergency Medicine, Endocrinology`
 - Other critical diseases (*Type: Complement*)
- Perform data reconciliation, enrichment and deduplication activities to filter target and personalization attributes
- Result audiences:** Healthcare - Cardiac patients prescription, Healthcare - Oncology patient care, Healthcare - Recommendation for clinical trial patients
- Identity:** Email

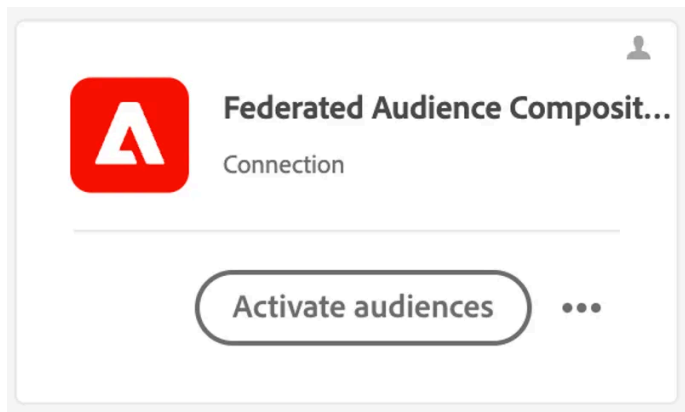
Create audience:

Segment customers based on critical illnesses and clinical services opted by targets, along with consent to share data for personalization

Use-case 3: Healthcare - Critical Illness Care

Destination

While activating audience and enriched attributes, you could leverage existing "**Federated Audience Composition**" (Type: Adobe Applications) destination for *Demo System Next*, which is a **Snowflake** database; or, you may choose to create a new destination.



Use the new FAC destination icon, with Adobe logo.

✓ ✱ Best Practices

While creating federated database connection in Experience Platform, it is a good practice to refer "**Working schema**" property (*Working schema is the schema in the federated database, with required privilege for the connection user to create/manage tables*).

By specifying a "**Working schema**" property for the federated database connection in Experience Platform, you're ensuring a cleaner and more organized database structure. This allows:

1. **Separation of Concerns:** Activation data tables will be created in a dedicated schema, keeping them separate from the original read schema.
2. **Cleaner Table Names:** The read schema will not get cluttered with the alphanumeric table names generated by the activation service, which helps maintain clarity and ease of navigation.
3. **Controlled Privileges:** The working schema will have the required privileges for the connection user to create and manage tables, ensuring proper security and access control.

This approach enhances the maintainability and readability of your database, which can be especially important in re-usable environments.

Do not refer the same audience label \ name in "**Save segment**" activity, in multiple composition workflows.

Reusing the same audience label or name in the "**Save segment**" activity across multiple composition workflows can lead to conflict / error and data integrity issues. To maintain clarity and avoid any potential conflicts, it's crucial to use unique labels or names for each segment within different workflows. This ensures that each segment is distinctly identifiable and correctly associated with its respective workflow.

Once a "**Save segment**" activity is executed and the corresponding audience is created, it's essential not to add new attributes (audience mapping properties) or change the data types of existing attributes. This is particularly important because:

- **Consistency:** Changing data types or adding new attributes can lead to inconsistencies in the data, making it challenging to maintain and interpret.
- **Data Integrity:** Ensuring the data remains unchanged preserves the integrity of the audience segment, preventing potential errors or mismatches in subsequent workflows.
- **Stability:** Keeping the structure of the audience data stable avoids disruptions in any downstream processes or integrations that rely on the original schema.

Compatibility: Expressions and data transformations often depend on the original data types. Altering these can result in invalid expressions or incompatible data formats.

(Data type change usually occur in case of expressions.)

When activating an audience using the federated destination category, tables with alphanumeric names are created. To easily identify the target table for a specific segment in the federated destination, it is recommended to include the segment name or a unique label during the data activation process.

Incorporate segment name / unique label (e.g. *static string expression like* "Prime membership prospect") in **"Save audience"** activity (*Audience mapping*) within composition workflow.

Ensure the segment name or unique label is included as an attribute during the "Save audience" activity. This facilitates clear identification and association of the segment.

The screenshot shows a user interface titled "Audience Mappings *". At the top is a button labeled "+ Add Audience Mapping". Below this is a list of attributes, each in a light gray box with a right-pointing chevron on the left and a trash icon on the right. The attributes are: CRMID, EMAIL, EMAIL_SHA256, LOYALTY_ID, FIBRE_CONNECTION_ELIGIBLE, DEVICES, and SEGMENT_NAME. The "SEGMENT_NAME" entry is highlighted with a green border. Below the list, there is a text prompt: "Select the primary identity and namespace to".

Audience mapping in "Save audience" activity

If the segment name or unique label is captured as an audience attribute from the composition workflow, it can be added as a **"Calculated (mapping) field"** during the activation step. This attribute should be included to maintain clarity and ease of identification in the federated destination.

Mapping

Filter fields

+ Add new mapping

+ Add calculated field ⓘ

SOURCE FIELD

TARGET FIELD

segmentMembership.status

segmentMembership.status



"Prime Membership - Pros..."



Attribute: tgt_segment_na...



Include unique label at activation