

Adobe Data Bootcamp

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1. Overview

1.1. Welcome

The main objective of Adobe Data Bootcamp is to help organisations understand what personalisation at scale means and how it is different from what most organisations are doing today. To deliver customer experiences that are consistent, contextual and real-time in an omni-channel world, you need a platform-first mindset where you define everything just once and re-use it everywhere. As part of the bootcamp, we will take a look at a real journey that combines customer interactions across website and call center to showcase what personalisation at scale really means, in a hands-on way. So hope you are ready to get your hands dirty!

Youtube

You can find other helpful videos on our YouTube channel, such as:

- Your siloed ecosystem and POV on Adobe Experience Platform
https://www.youtube.com/watch?v=5uRNGURQr_A
- AEP Architecture Whiteboard <https://www.youtube.com/watch?v=LLFgpPW3KfU>

Agenda

The exercises span across four key sections, details can be found with the links below:

1. Acquisition

2. Onboarding Journey

3. Digital x Physical

4. Customer Journey Analysis

2. Module 1

2.1. Introduction To Module 1

The journey from unknown to known is one of the most important topics amongst brands these days, as is the customer journey from acquisition to retention.

Adobe Experience Platform plays a huge role in this journey. Platform is the brains for communication, the experience system of record.

Platform is an environment in which the word customer is broader than just the known customers. An unknown visitor on the website is also a customer from Platform's perspective and as such, all of the behaviour as an unknown visitor is also sent to Platform. Thanks to that approach, when this visitor eventually becomes a known customer, a brand can visualise what happened before that moment as well. This helps from an attribution and experience optimisation perspective.

- 1. Acquisition
 - 1.1 Visit the website
 - 1.2 Create an account on the website
 - 1.3 Create an audience segment in AEP UI
 - 1.4 Take Action: send your segment to Facebook
 - 1.5 Advanced Segmentation - optional
- 2. Onboarding Journey
 - 2.0 Visualise your customer profile in AEP

- 2.1 Install & use the mobile app
- 2.2 Create a login event
- 2.3 Create a login journey
- 2.4 Trigger your journey

2.2. 1. Acquisition

2.2.1. 1. Acquisition

Prerequisites

- Access to Adobe Experience Platform: <https://experience.adobe.com/platform>
- Access to the Demo Website: <https://dsn.adobe.com/web/apac-fsi>

Important!

This tutorial was created to facilitate a particular bootcamp format. It uses specific systems and accounts to which you might not have access while not attending the Bootcamp. If you're a participant in one of the Bootcamps and need your access credentials, please contact your Adobe representatives present who will provide you with the required information.

Exercises

1.1 Visit the website

In this exercise, you'll follow a script and walk through the website as a customer.

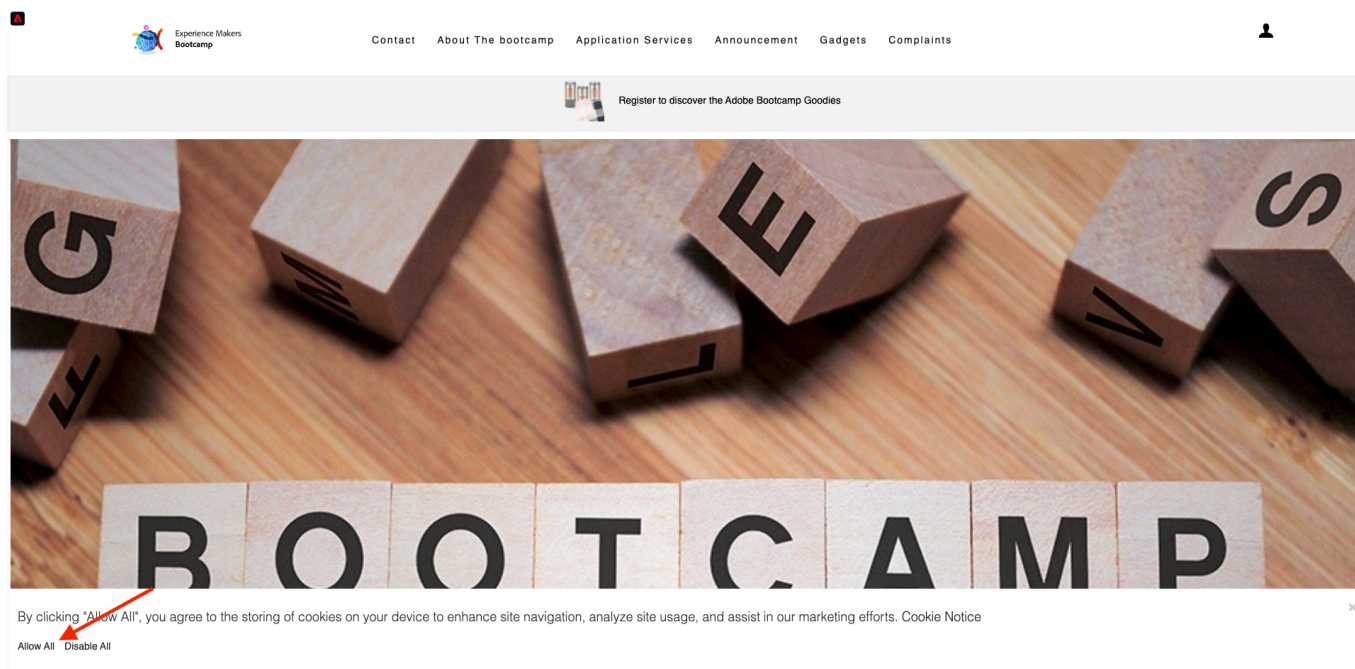
1.2 Create an account on the website

In this exercise, you'll create an account on the website and receive a welcome email.

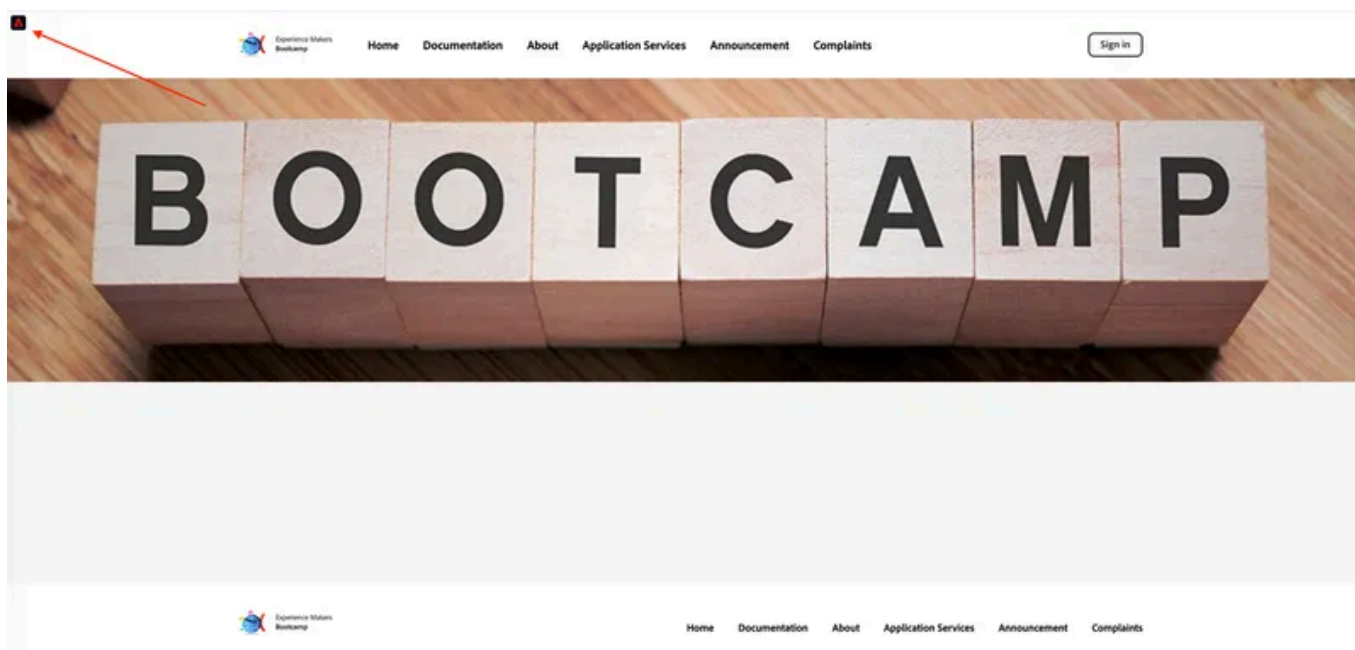
2.2.2. 1.1 Visit the website

Access the demo website here: <https://dsn.adobe.com/web/gillies-8WFS/home>

If you receive a pop up regarding cookies on your device, please click **Allow All**.

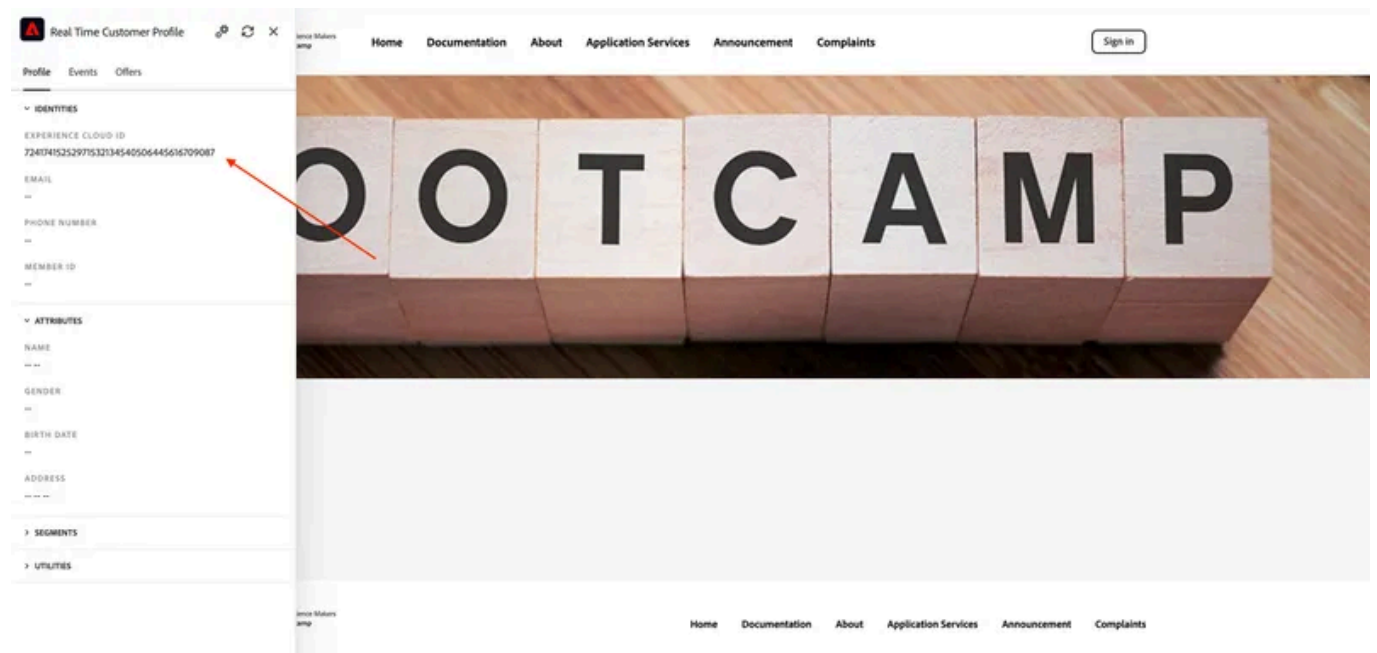


Click the Adobe logo icon in the top left corner of your screen to open the Profile Viewer.

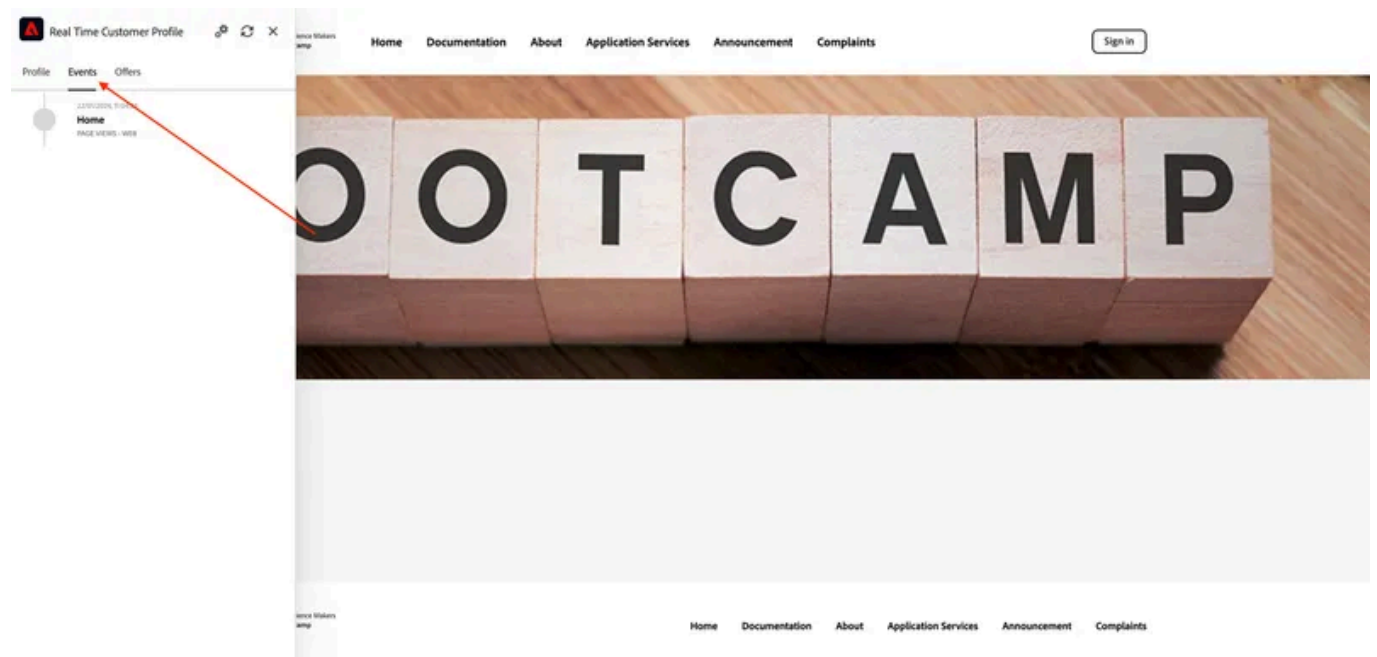


Have a look at the Profile Viewer panel and the Customer Profile with the **Experience Cloud ID (ECID)** as the primary identifier for this currently unknown customer. Please **copy**

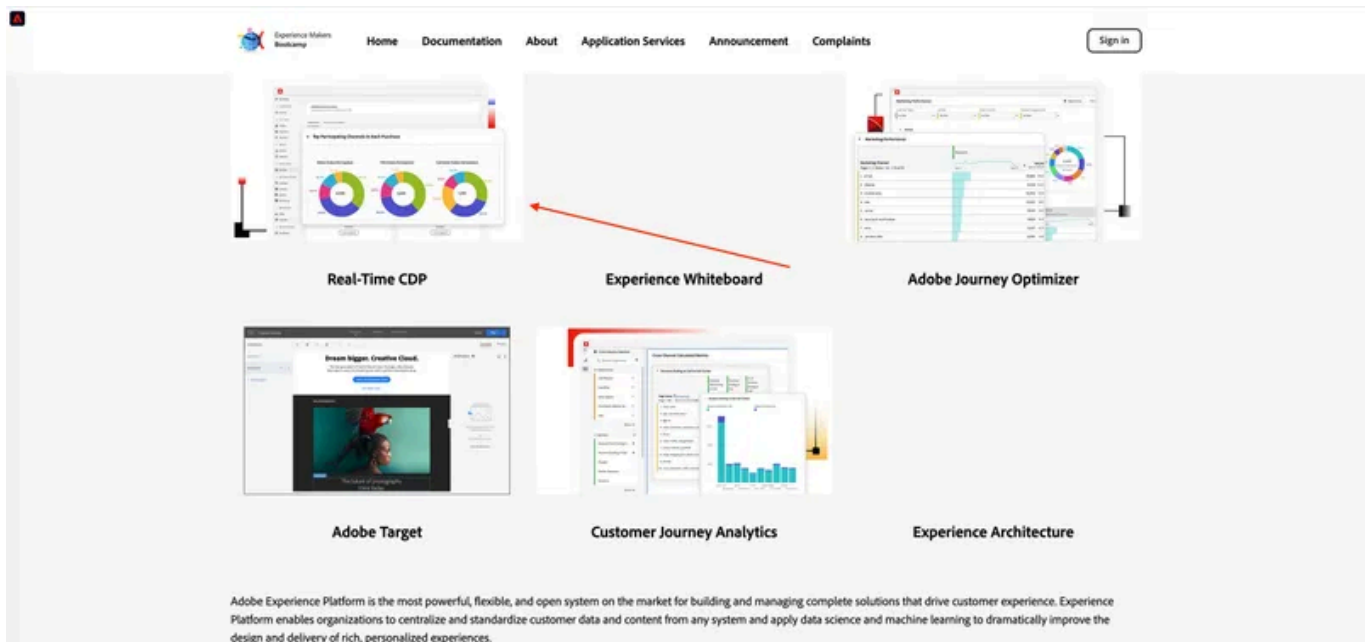
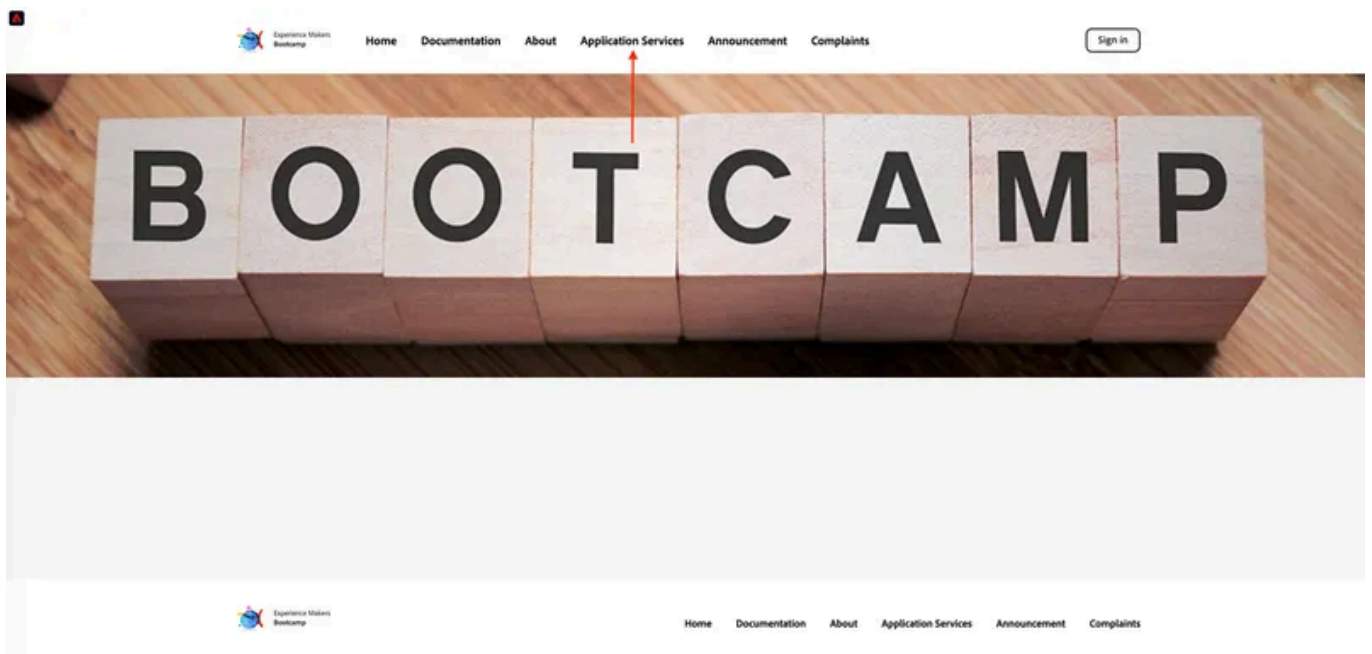
and save this identifier for use as a reference in further exercises.



You can also see all the Experience Events that were collected based on the customer's behaviour. Your list may currently be empty but that will change soon.



Click on '**Application Services**' from the menu option, and then click on the product **Real-Time CDP**.



You'll then see the product detail page. An Experience Event of type **Product View** has now been sent to Adobe Experience Platform using the Web SDK. Open the Profile Viewer panel and have a look at your **Experience Events**. (You may need to press refresh on the panel.)

Real-Time CDP

Real-time CDP is the centralization of every touchpoint for every customer, every time. Actionable data that drives real-time personalization.

ML-powered personalization, recommendations, and user experience. And these are enriched by customer profiles that update in real time based on data from every channel — including CRM, web, mobile, AR, chat, and more — even if it was anonymous.

Every activity on every channel can be personalized based on the same real-time profile, giving you unparalleled access to customer behaviors and insights that aren't limited by channel or data source.

As an Experience Platform, Real-time Customer Data Platform (Real-time CDP) helps companies bring together known and anonymous data from multiple enterprise sources into a single customer profile that can be used to provide personalized customer experiences across all channels and devices in real time.

Real-time CDP includes tools for data governance, identity management, advanced segmentation, and data science so that you can build profiles and define audiences, as well as derive insights while being able to enforce strict data governance policies.

Real-time Customer Data Platform connects to a large ecosystem of partners, not to mention native integrations with Adobe Experience Cloud, so you can seamlessly activate these insights to deliver great customer experiences across all channels, from on-site or in-app personalization to email, paid media, call centers, connected devices, and more.

With Real-time Customer Data Platform, you can:

- Create a single view of your customer by combining data from across the enterprise.
- Consistently manage profiles with trusted governance and privacy controls for known and anonymous identifiers.
- Derive actionable insights and scale audiences with AI and machine learning powered by Adobe Sensei and built for marketers.
- Deliver personalized experiences in real time across all channels and destinations.

Go to the **Application Services** menu option and click on the product **Adobe Journey Optimizer**. Another Experience Event has been sent to Adobe Experience Platform.

Real-Time CDP

Experience Whiteboard

Adobe Journey Optimizer

Adobe Target

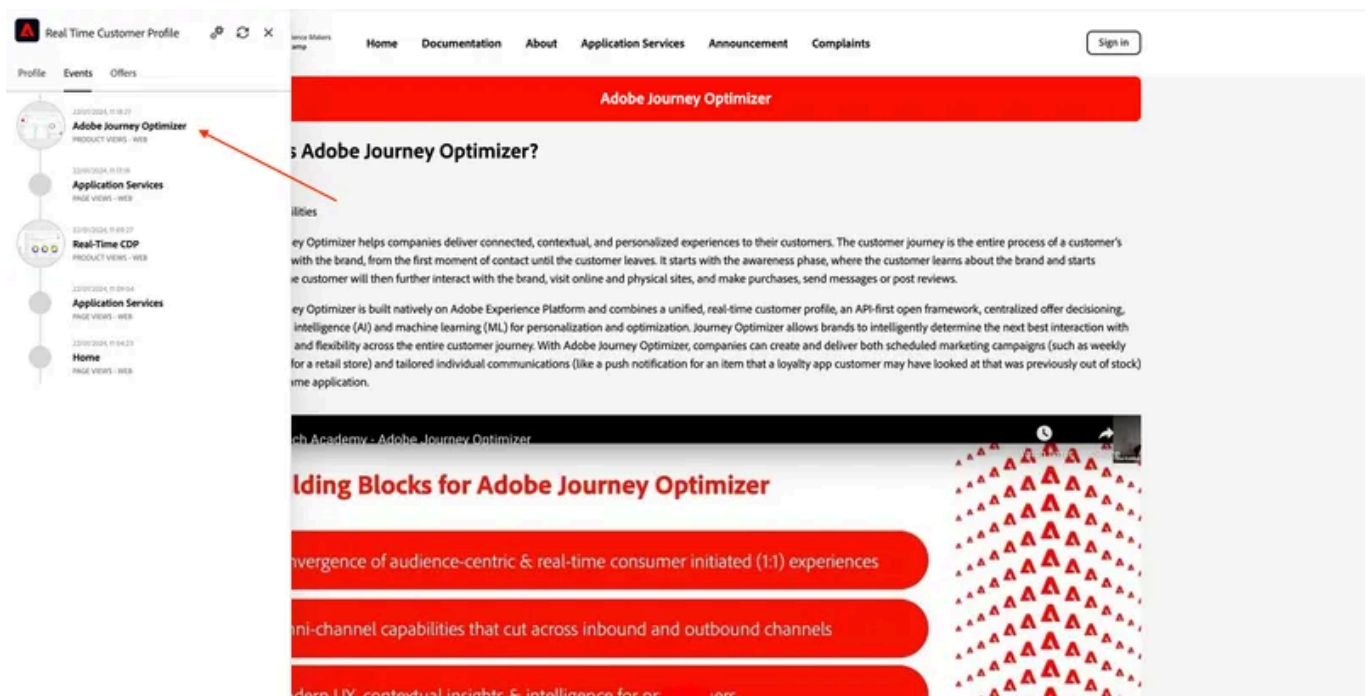
Customer Journey Analytics

Experience Architecture

Adobe Experience Platform is the most powerful, flexible, and open system on the market for building and managing complete solutions that drive customer experience. Experience Platform enables organizations to centralize and standardize customer data and content from any system and apply data science and machine learning to dramatically improve the design and delivery of rich, personalized experiences.



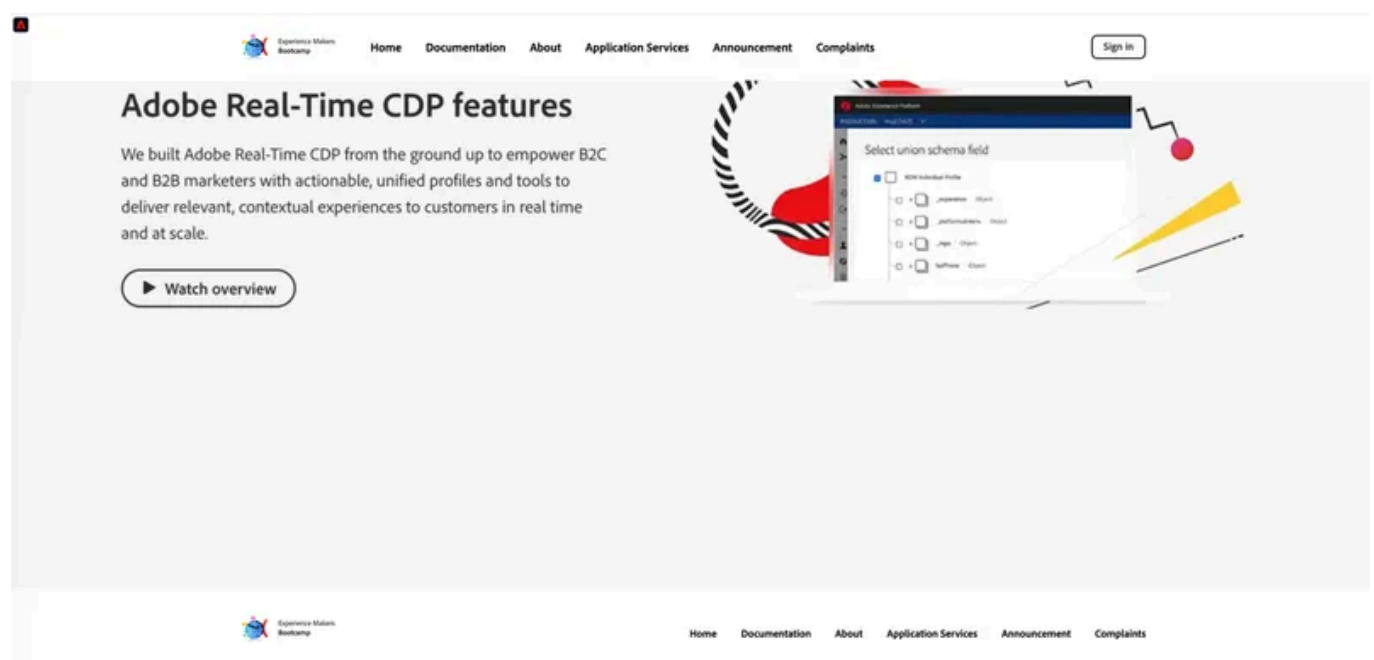
Open the Profile Viewer panel. You'll now see multiple Experience Events of type **Product View**. While the behaviour is anonymous, every click is tracked and stored in Adobe Experience Platform. Once the anonymous customer becomes known, we'll be able to merge all anonymous behaviour automatically to the known profile.



All these browsing events captured can be used to qualify your profile for segments to provide you with more personalised experiences.

For example, the event of browsing the page for Real-Time CDP could be used to qualify profiles for a segment called "Interest in Real-Time CDP" and that segment could form an audience for an on-site personalisation activity that further emphasises the Real-Time CDP product.

Navigate back to the home page of the Bootcamp website and you should see that the home page banner has changed to promote the Real-Time CDP.



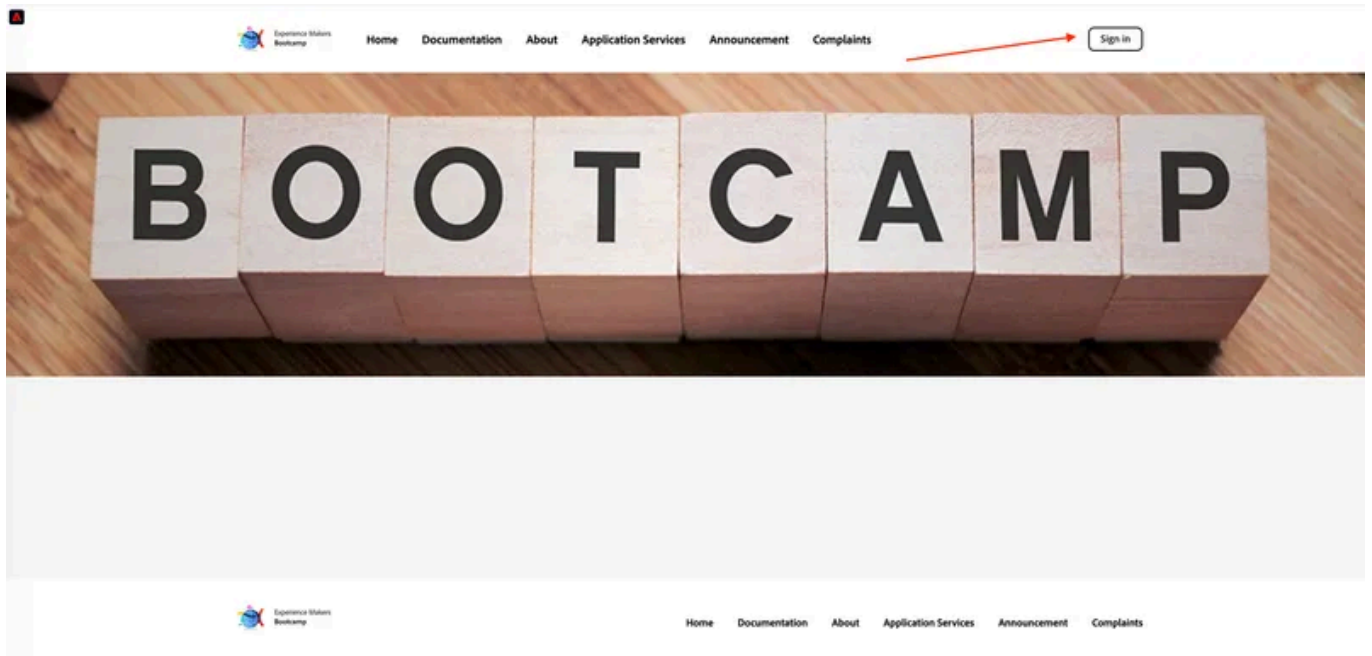
Shortly we will build a segment similar to this in Adobe Experience Platform. But before we do so, let's register our profile on the website.

Exercise complete checklist

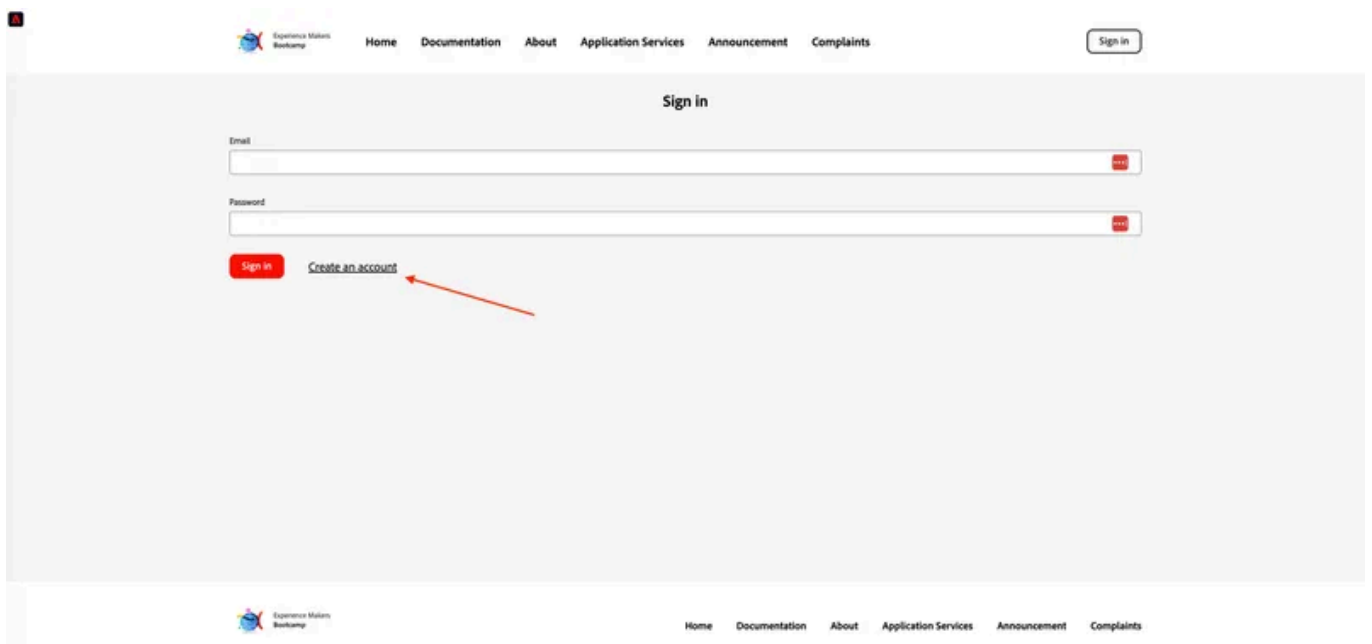
- ☐ Copy and pasted Experience Cloud ID (ECID) for use as reference in further exercises
- ☐ Browsed Real-Time CDP and AJO products on the website
- ☐ Viewed Experience Events in Profile Viewer (top left hand corner of website)

2.2.3. 1.2 Create an account on the website

Click the **Sign In** button in the top right corner of your screen.



Click **Create an account**.



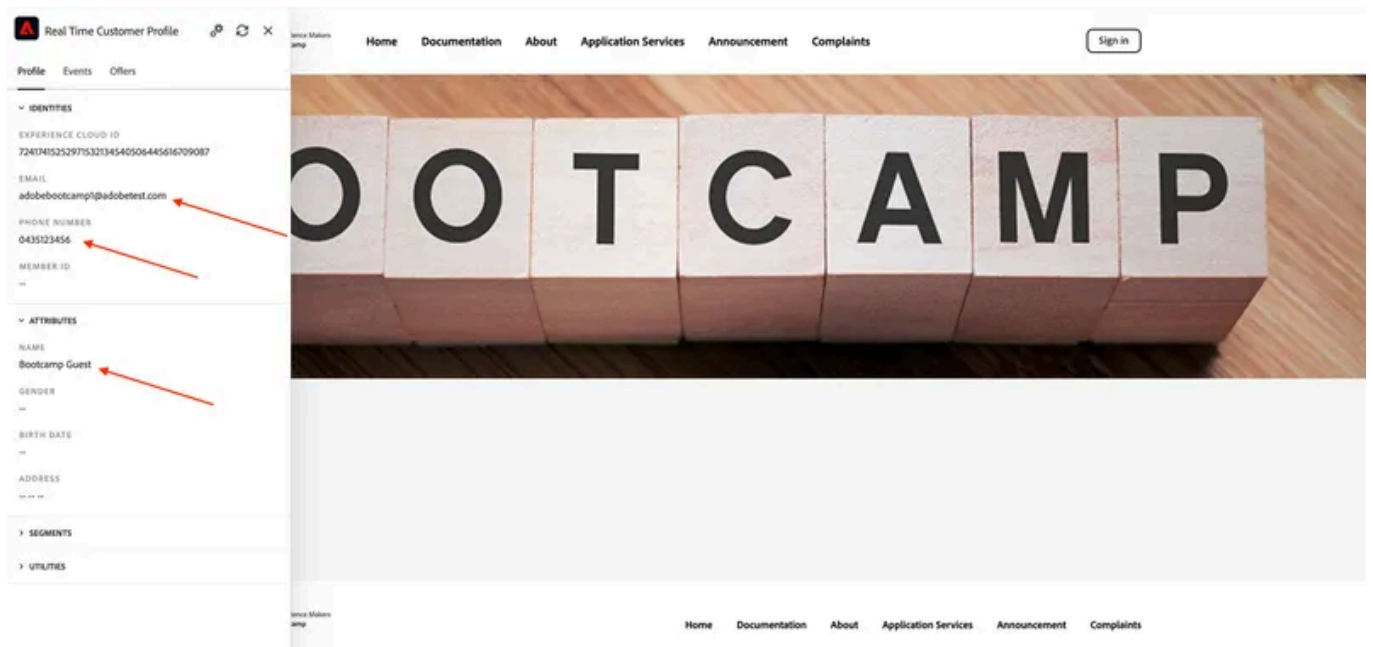
Fill out all the fields of the form and click **Register**. Use a real value for your own email address (not the Bootcamp Experience Cloud user login), as it will be used in later exercises for delivery of email communications. (Note, there is no need to fill out the Event ID field at this stage in the form.)

As this registration email will be used to deliver a registration email to your inbox, use an email address that you have access to at the Bootcamp. If you prefer not to enter your email then you can of course use a made up value, but in that case you will not be receiving any of the communication related to the exercises.

The screenshot shows a registration form titled 'CREATE AN ACCOUNT' and 'LET US KNOW YOU BETTER'. The form is divided into several sections:

- CREATE AN ACCOUNT:**
 - First name:** Text input field with 'Bootcamp' entered.
 - Last name:** Text input field with 'Guest' entered.
 - Shoe size:** Dropdown menu.
 - Email:** Text input field with 'adobebootcamp1@adobetest.com' entered.
 - Phone number:** Text input field with '0435123456' entered.
 - Shirt size:** Dropdown menu.
 - Gender:** Dropdown menu.
 - Birth day and month (DD-MM):** Text input field.
 - Favorite color:** Dropdown menu.
 - Password:** Text input field with 'wtgfbvrt' entered.
- ADDRESS:**
 - Street address:** Text input field.
 - City:** Text input field.
 - Postal code:** Text input field.
- Preferences:**
 - ☐ I want to join loyalty program
 - ☒ I want to receive personalized communication by email
 - ☒ I want to receive personalized communication by phone (SMS/Push/Phone Call)
 - ☒ I have read and understand the Privacy and Cookies Policy
- Preferred channel:**
 - ☐ Phone
 - ☐ SMS
 - ☐ Email
- Event id:** Text input field.
- Register:** Red button at the bottom.

Take a look at your now registered profile in the **Profile Viewer** panel. You should be able to see your **ECID**, **email** address, and **phone number** (if you entered one) under 'identities'.



We will revisit the account creation welcome journey in exercise 2, but next we will log into Adobe Experience Platform to build a segment.

Exercise complete checklist

- ☐ Created an account on website
- ☐ Additional identities able to be viewed in Profile Viewer panel

3. Module 2

3.1. Introduction to Module 2

In this section we will start with a quick re-cap of Module 1.

Hopefully by now you understand the unified customer profile is at the heart of digital transformations that integrate digital and physical touchpoints seamlessly to deliver omnichannel customer experiences. We will finish with Customer Journey Analytics which can access data sets ingested into Adobe Experience Platform such as call centre, CRM data, campaign and response data coming from direct marketing channels, on-site interaction data etc. You will get a taste of having a rich set of data at your finger tips and start analysing the data with some hands-on exercises.

- 3. Customer Journey Analysis
 - 3.1 Get familiar with the CJA UI & Person centric Insights
 - 3.2 Use case: Call centre deflection
 - 3.3 Use case: Cross channel attribution
 - 3.4 Put insights into action

3.2. **3. Customer Journey Analysis**

3.2.1. **3. Customer Journey Analysis 101**

In this user flow, you will get hands-on experience with the Customer Journey Analytics application service.

Learning Objectives

- Become familiar with the Customer Journey Analytics UI
- Use Analysis Workspace to get insights
 - At a person level
 - Analyse the customer journey beyond digital channel
 - Attribute non digital interactions to a proper campaign
- Put Insights into Action via RTCDP or AJO

Prerequisites

- Access to Adobe Experience Platform: <https://experience.adobe.com/platform>
- Access to Customer Journey Analytics:
<https://experience.adobe.com/platform/analytics>

This tutorial was created to facilitate a particular bootcamp format. It uses specific systems and accounts to which you might not have access. Even without access, we think you can still learn a lot by reading through this very detailed content. If you're a participant in one of the bootcamp and need your access credentials, please contact your Adobe representative who will provide you with the required information.

Overview of CJA

Customer Journey Analytics (CJA) allows you to analyze your customer's behaviour/journey across channels using any data available to you in Adobe Experience Platform, leveraging the power of Analysis Workspace for rapid insights. Customer Journey Analytics lets you control how you connect your online and offline data in Analysis Workspace *on any common person ID*. The capabilities within Customer Journey Analytics deliver context and clarity to the complex multi-channel customer journeys. The provided context generates actionable insight into how to remove pain points from the customer conversion process and deliver positive experiences in the moments that matter most.

Common Use Cases

Types of insights that you can get with CJA:

1. Call center deflection: I need to understand which digital experiences can be improved to reduce the calls to our call center.
2. Cross Channel Attribution: I need to understand & attribute successes from any digital or non-digital interaction to the proper campaign
3. Improve NPS by integrating voice of the customer data: I need to understand where in the journey were the customers when they gave the score; Understand the context to identify pain points and optimise.
4. Combine my Adobe Analytics report suites: I want to combine data from my different Adobe Analytics report suites & visualise customers journey across devices & brands.

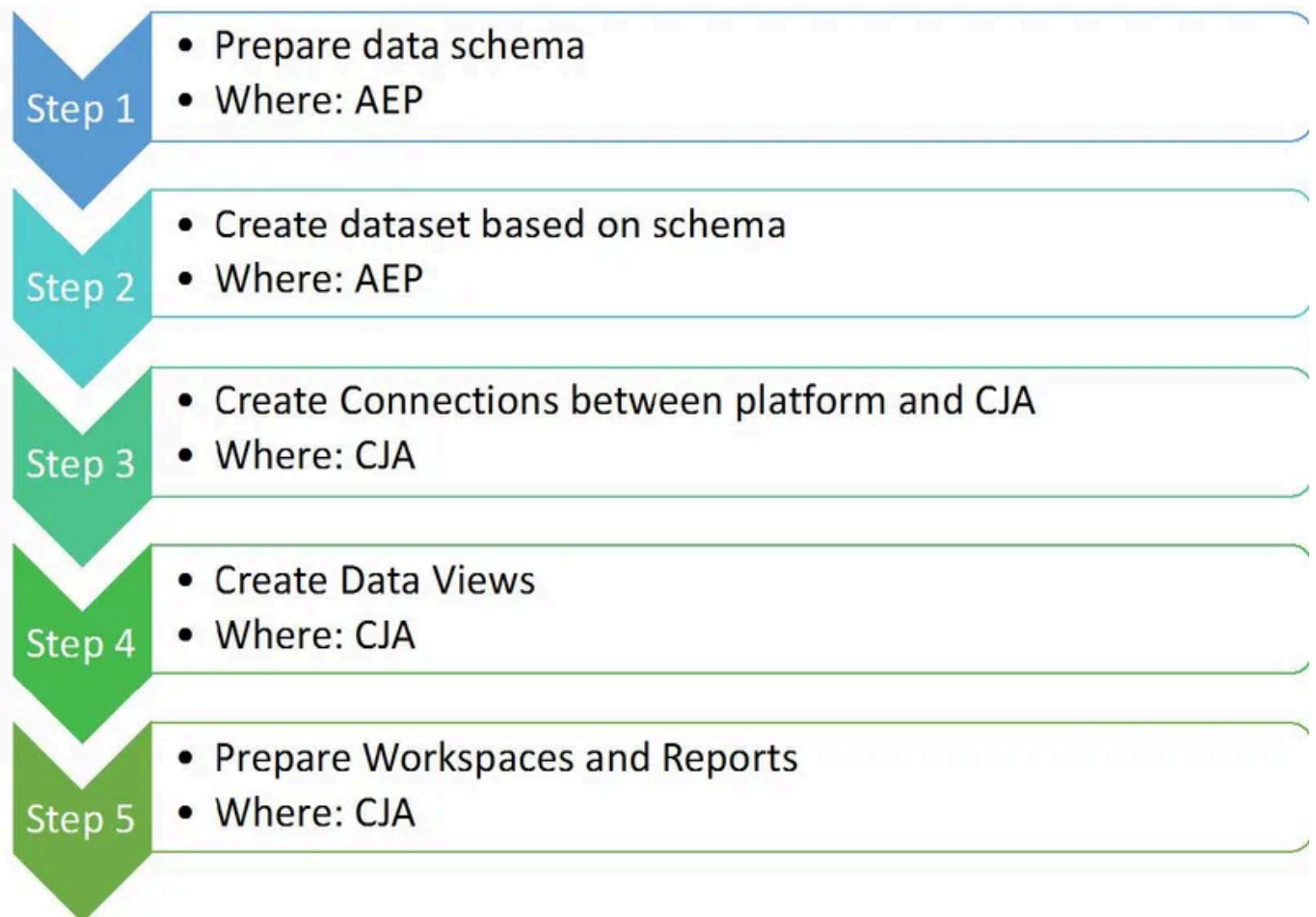
Have a look at this video to understand the value, customer journey and configuration process:

{% embed url="<https://video.tv.adobe.com/v/327188?learn=on&quality=12>" %}

Overview of Customer Journey Analytics can be found [here](#) and this [link](#) provides a comprehensive learning journey to introduce you to Customer Journey Analytics (CJA).

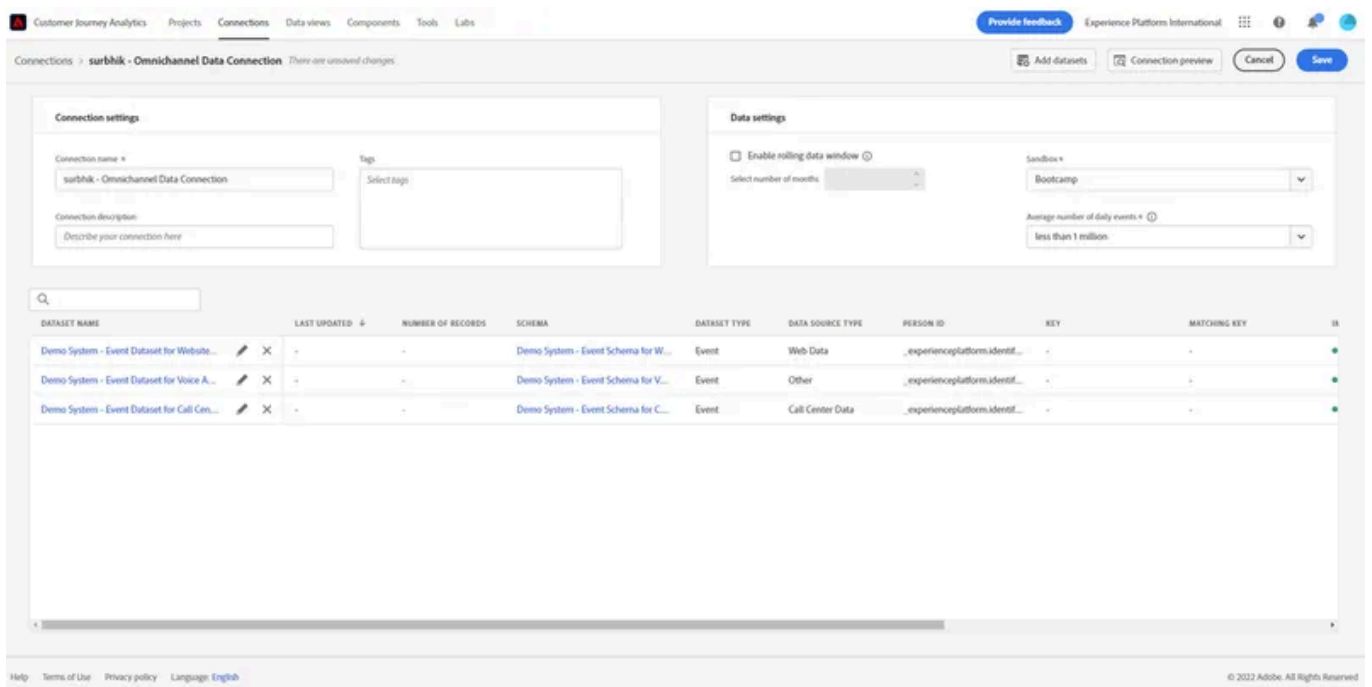
Understand the Customer Journey Analytics workflow

Before starting the next exercises it's key to understand what steps are needed to bring data from Adobe Experience Platform into CJA in order to visualise it and get some deep insights. It's what we call CJA Workflow and will be covered by a live demo.



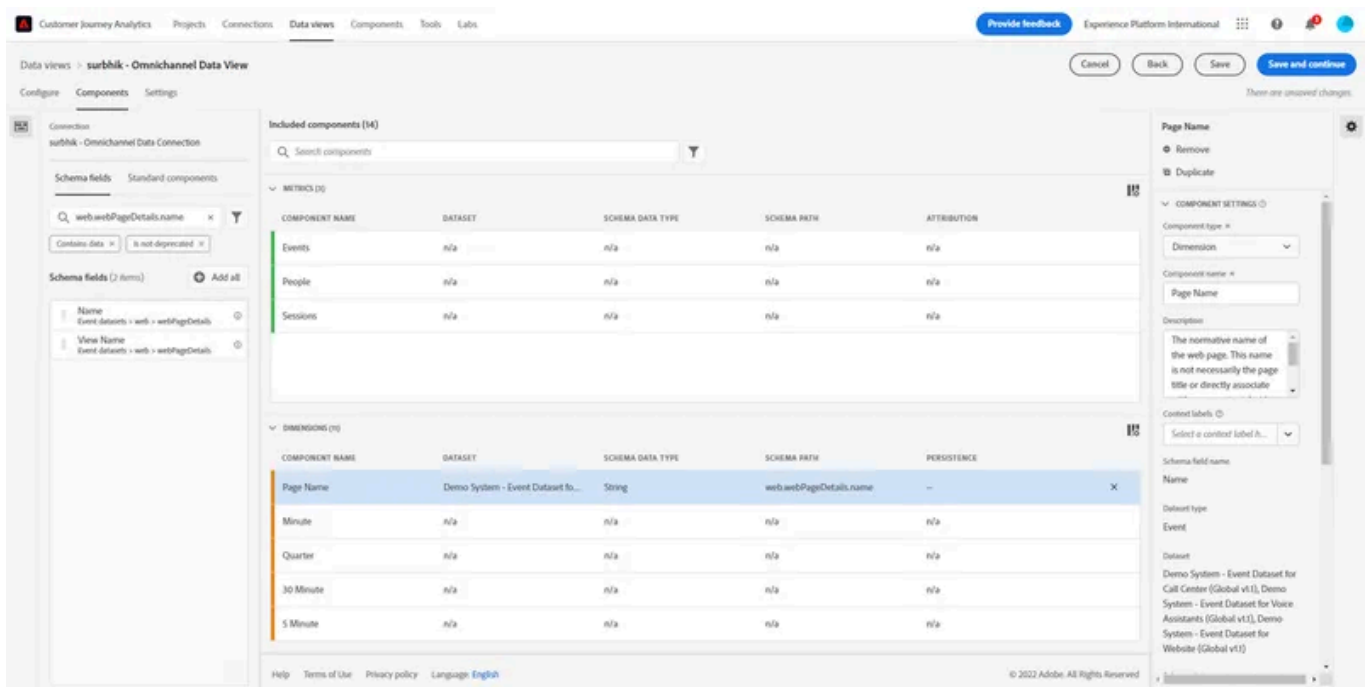
Step 1 & 2 : Get data into Adobe Experience Platform

Step 3: Create a **CJA connection**- A CJA connection allows you to combine multiple Experience Platform datasets into a single analysis environment in Analysis Workspace.

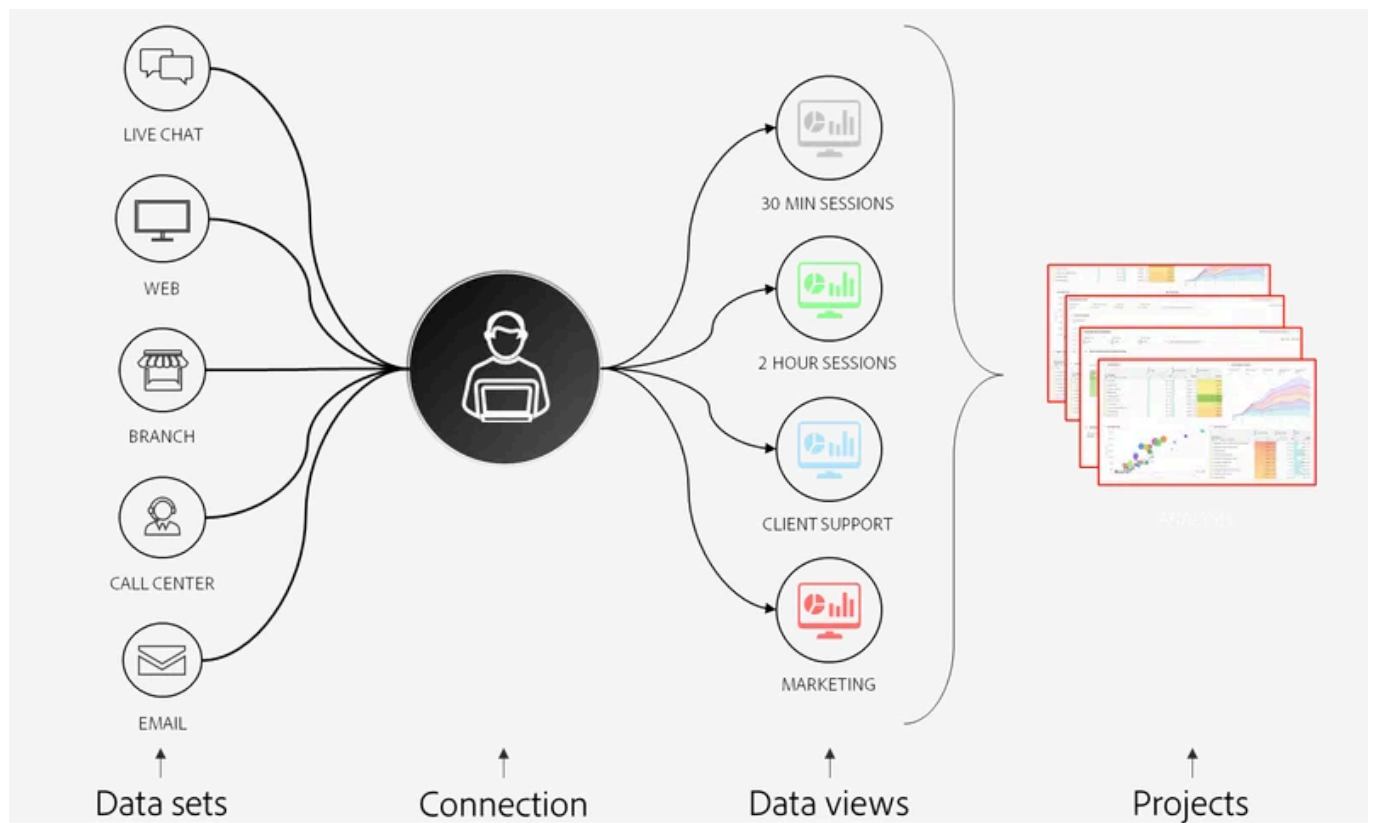


Step 4: Create CJA data views - Data views sit on top of your connections and act as a metrics layer for your data. They give you a consistent view of dimensions and metrics with the right transformations applied in just the right way so that anyone accessing data through CJA can speak the same language and use the same data

In Data views, you can use Derived Fields, to retroactively apply complex data changes on-the-fly, without the need to rewrite or reingest the data.



Step 5: Analyse in CJA workspace projects.



Exercises

3.1 Get familiar with the CJA UI & Person centric Insights

Learn all about the Customer Journey Analytics UI & Person centric insights.

3.2 Use case: Call center deflection insights

Learn about omni channel insights, analyse top pages that led to calls.

3.3 Use case: Cross Channel Attribution

Learn about how to apply different attribution models and see the impact on non-digital channels.

3.4 Put insights into action

Learn how to take your insights in the form of an audience into action using Real-Time CDP and Adobe Journey Optimizer.

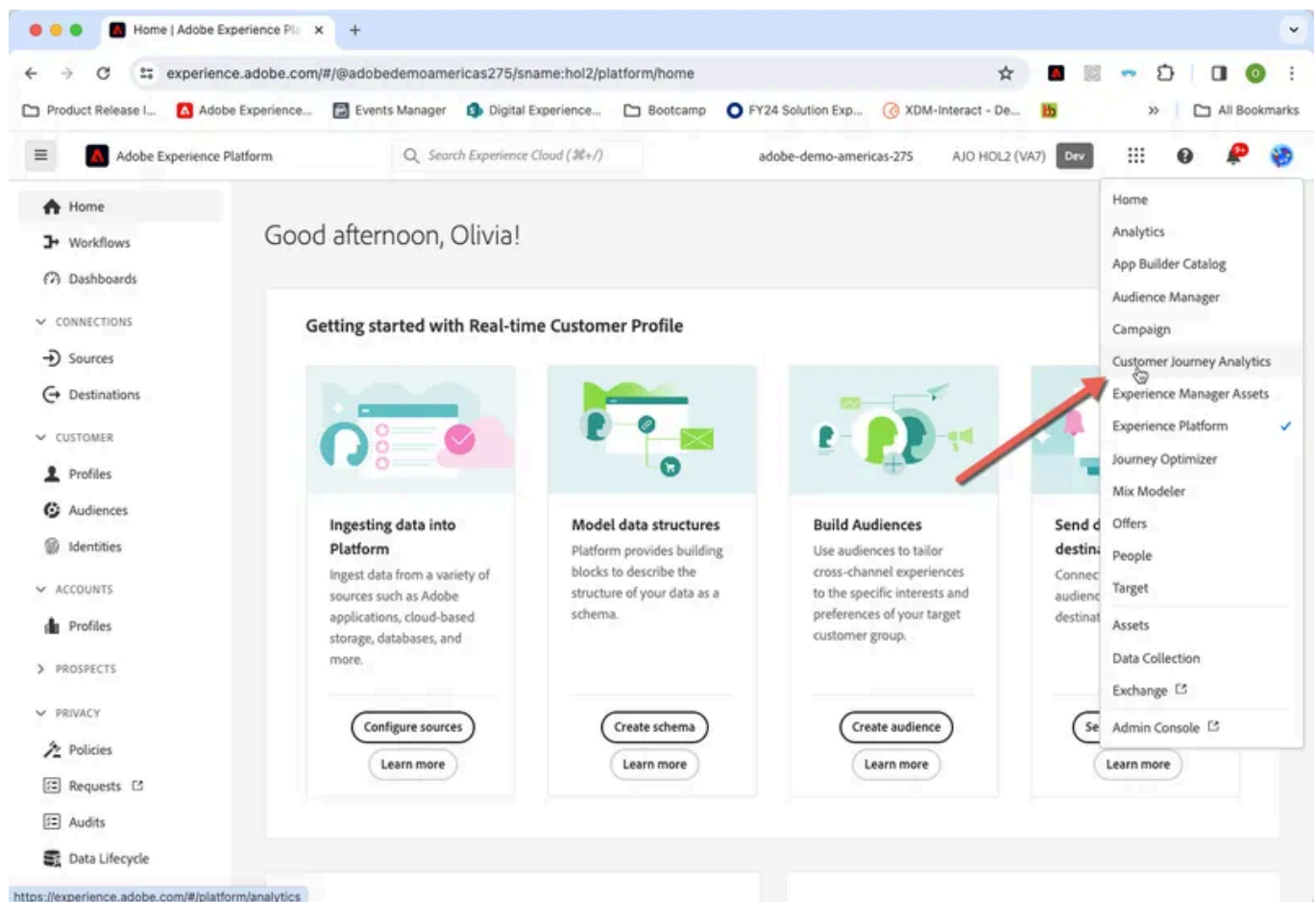
3.2.2. 3.1 Get familiar with the CJA UI & Person centric Insights

Exercise:

In this module you will familiarise yourself with the Customer Journey Analytics (CJA) UI and how you can start to analyse data at a **person** level.

Access CJA

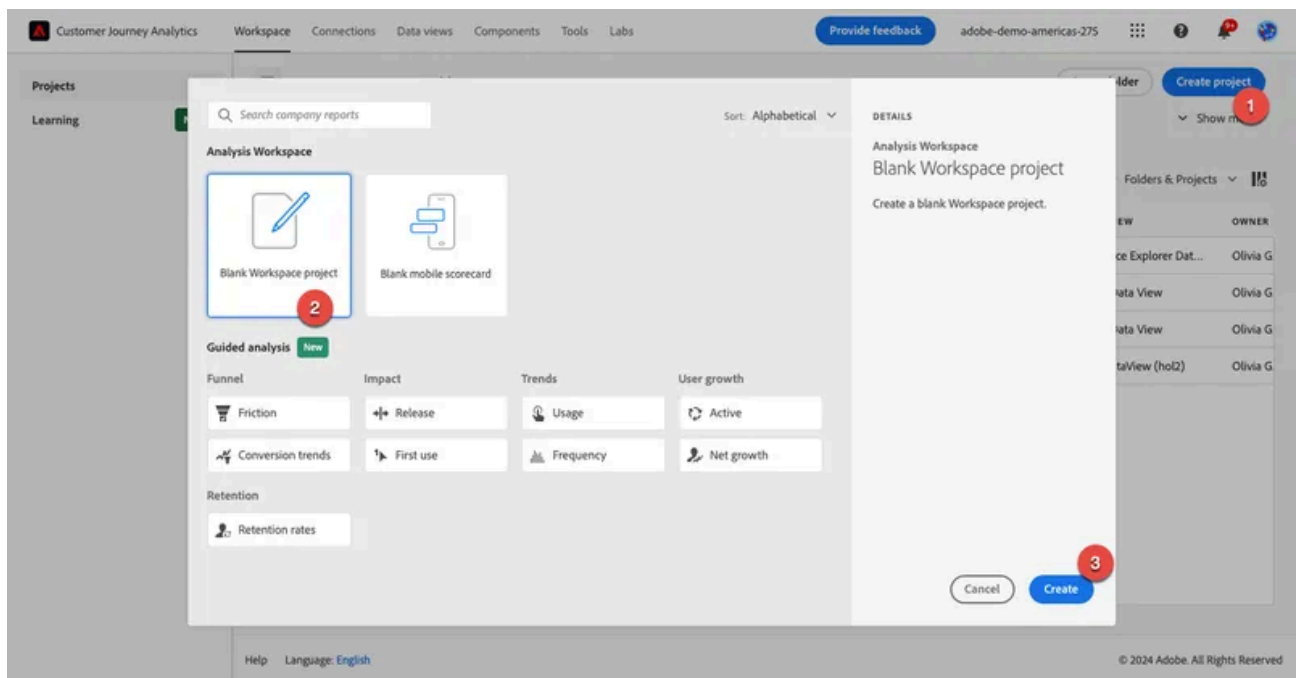
Click on the 9 dots on top right and select Customer Journey Analytics.



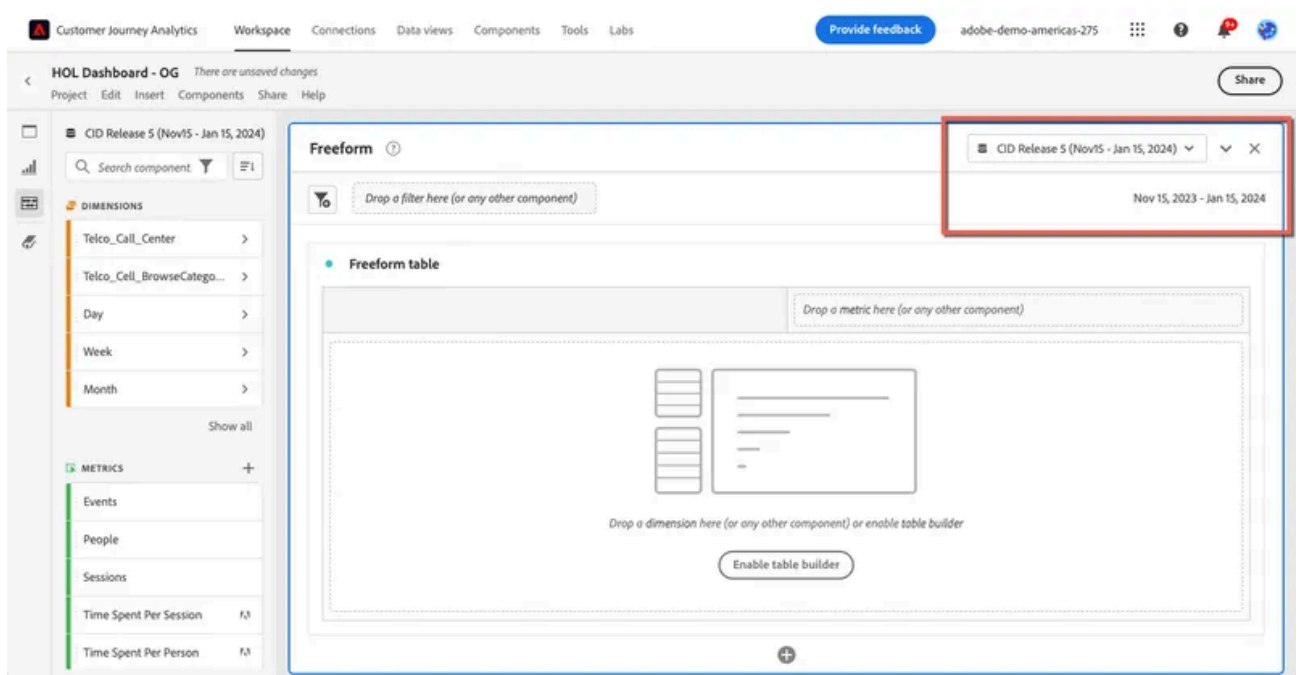
Introduction to the UI

4.1.1 Create a new workspace project

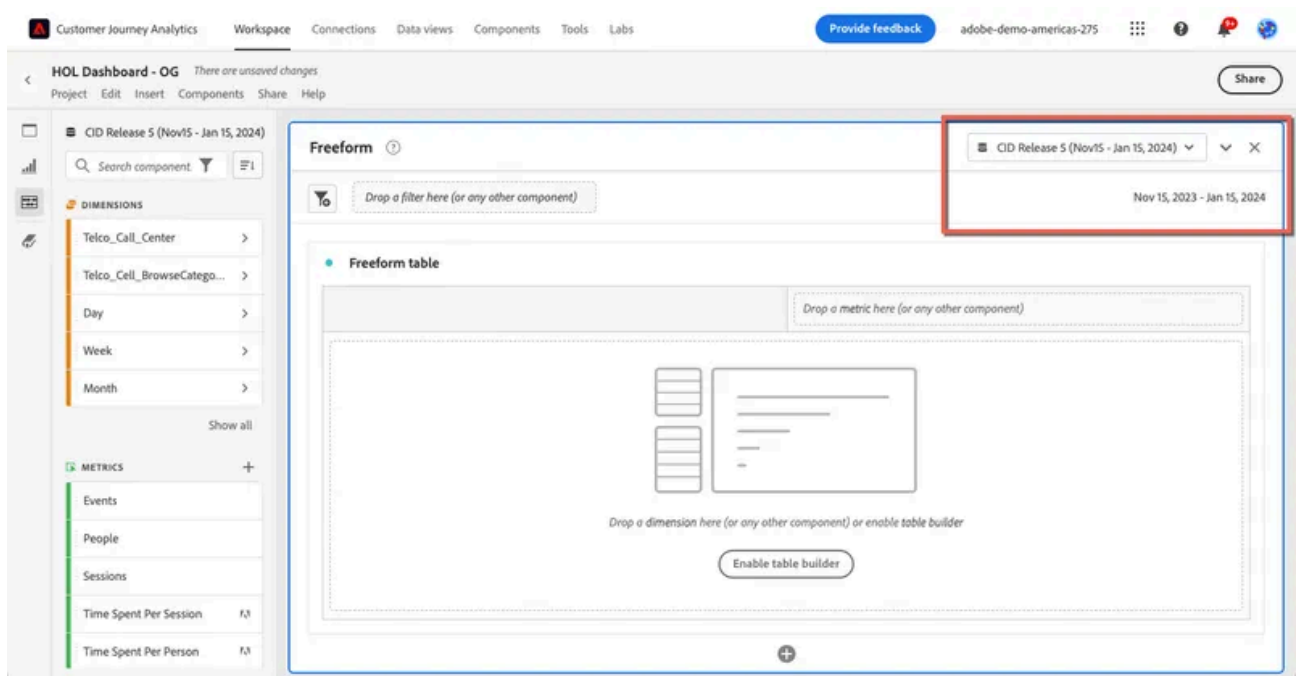
1. Create a new workspace project



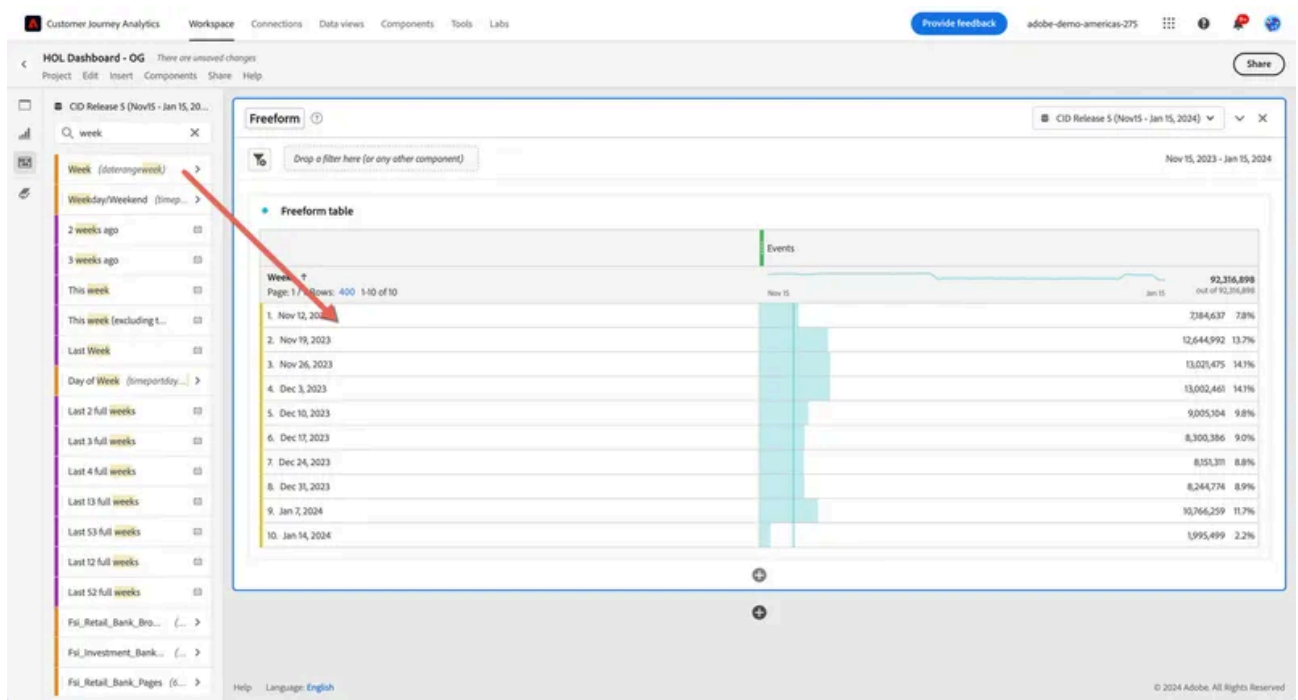
- The left side rail contains the Panel menu (where new panels can be dragged to the project), the Visualisation menu (where visualisations can be dragged to a panel), and the Components menu (where Dimensions, Metrics and Filters are found and can be dragged to the panel visualisations). Ensure that the **CID Release 5 (Nov15 - Jan 15, 2024)** is selected in the Data View selector



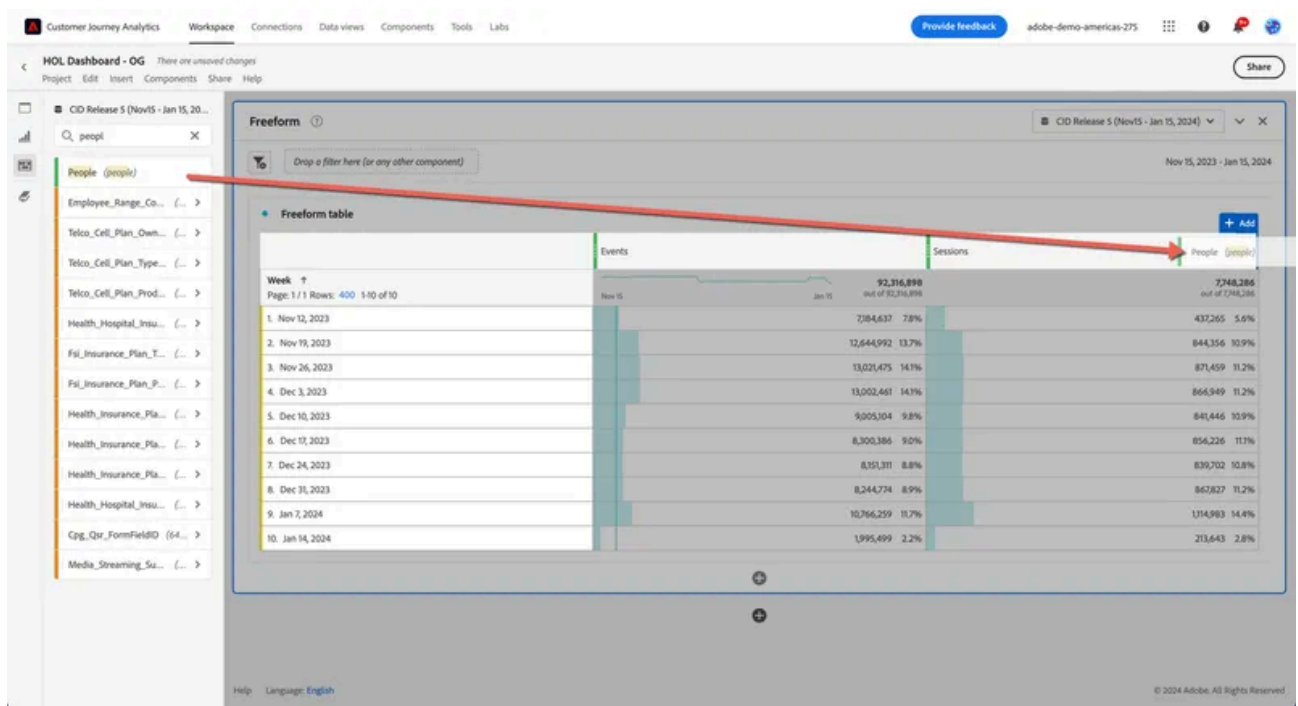
- Set Reporting Date Range to **Nov 15 2023 - Jan 15, 2024** from table below and click **Apply**.



4. Drag the **Week** dimension from the Components menu and drop it into the Freeform Table visualization in the Panel.

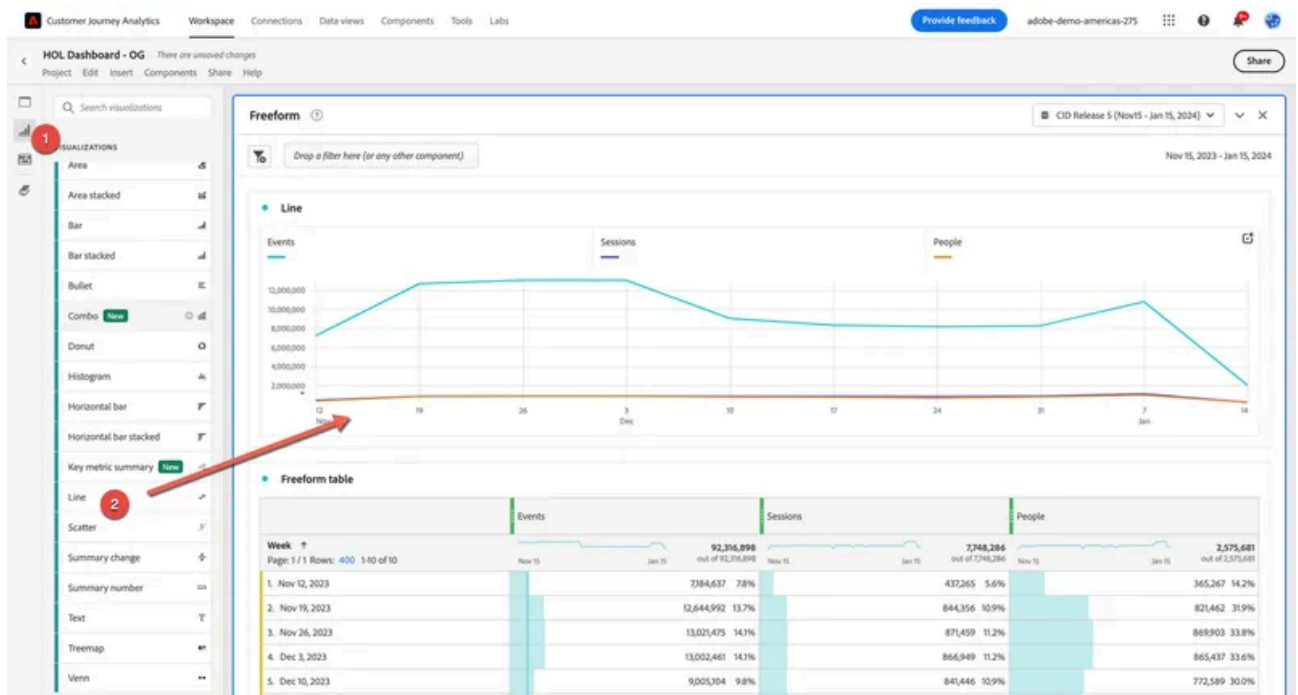


5. Drag the **Sessions** and the **People** metric from the Components menu and add these to the table

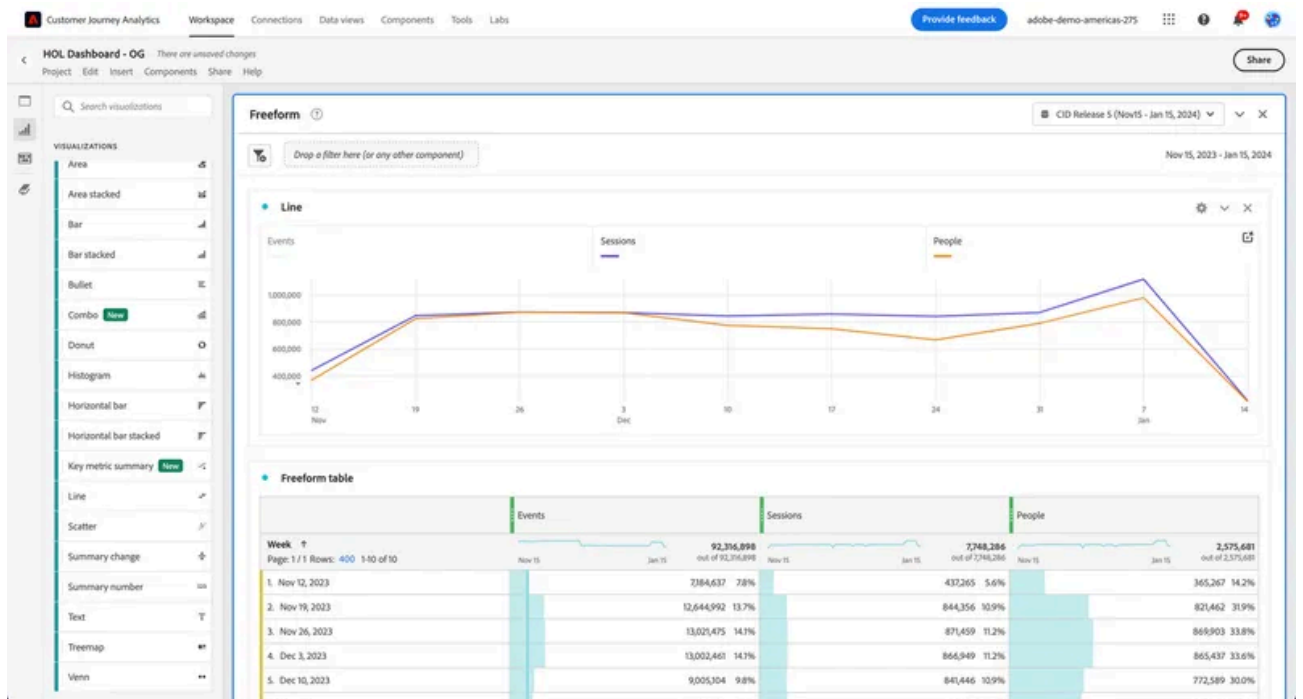


4.1.2 Add a line visualisation

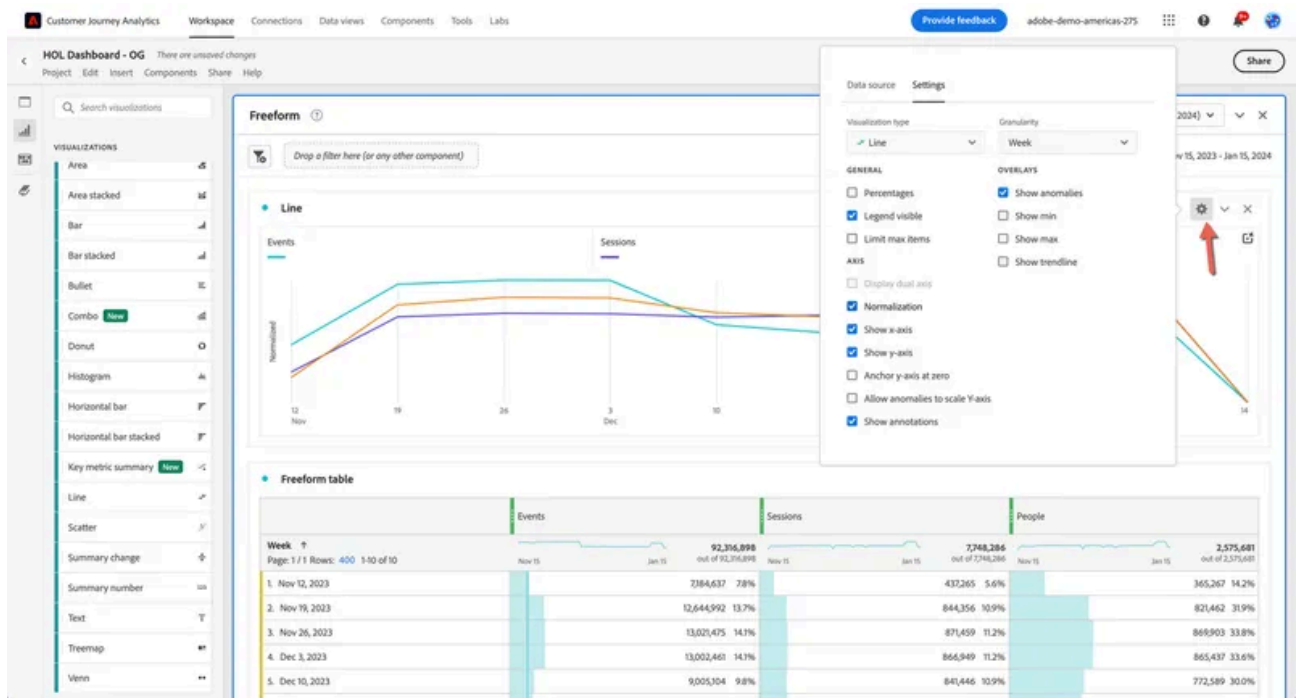
1. Click on Visualisations in the left menu and drag the Line visualisation to the Dashboard panel above freeform table.



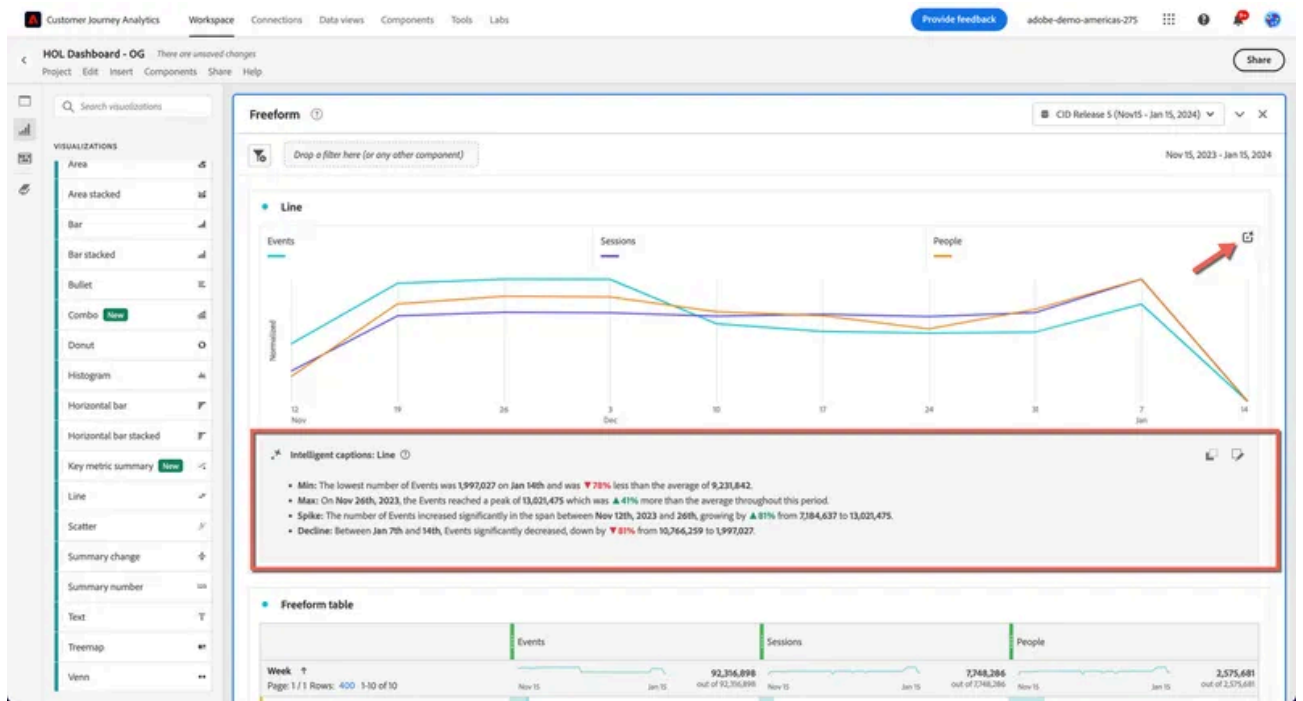
2. The Line visualisation will automatically connect to the data table closest to it and will visualise the dimensions and metrics in that table. The dimension is the x-axis and the metrics are trended. You can click individual metrics to disable them in the visualisation.



3. You can adjust the settings of the visualisation by clicking on the cog icon at the top right.



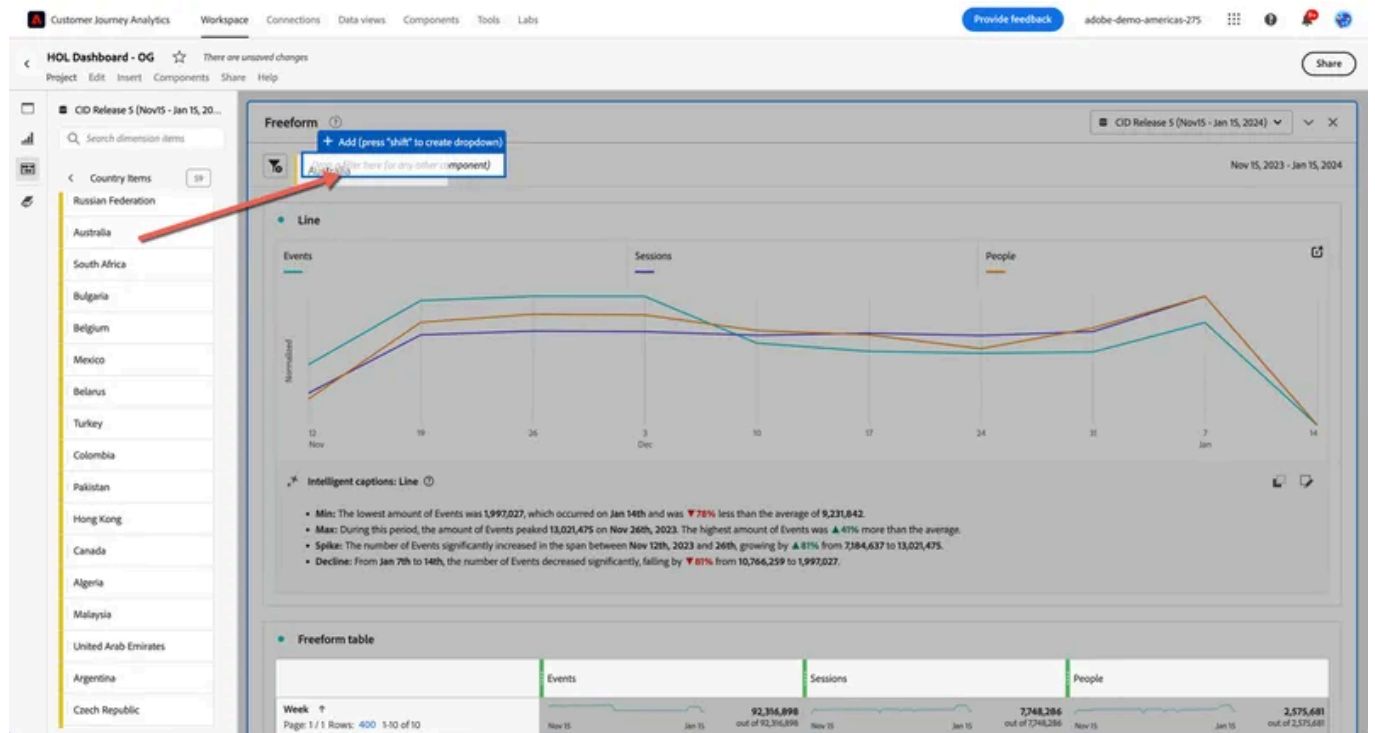
4. You can use Adobe Sensei to generate intelligent captions describing the trends seen from your data by clicking the AI icon in the top right.



4.1.3 Add a filter

In CJA, your events will be linked to your profile (at least for offline event and logged in session), so you can use your CRM data to filter your data.

1. Search for **Country** in the left panel.
2. **Press Shift & Click** on the ">" icon just right of **Country** and drag it to the filter section . This will create a drop down of different countries that you can filter the metrics on.



4.1.4 Save your project

1. Now would be a good time to save this Project so we don't lose any of our work.
2. Click on Project and then Save, or Control/Command S to open the Save Project window.
3. Name the project `<your lastname>_ DataBootcamp` and select **Company Folder** to store it in. Then click to Save the project.
4. Click Save Project.

Exercise Checklist:

- ☐ Able to drag & view `Sessions` & `People` by `Week` in Analysis workspace
- ☐ Able to save your CJA project as `<your lastname>_ DataBootcamp`

Congratulations! You have created your first CJA project!

3.2.3. 3.3 Use case: Cross Channel Attribution

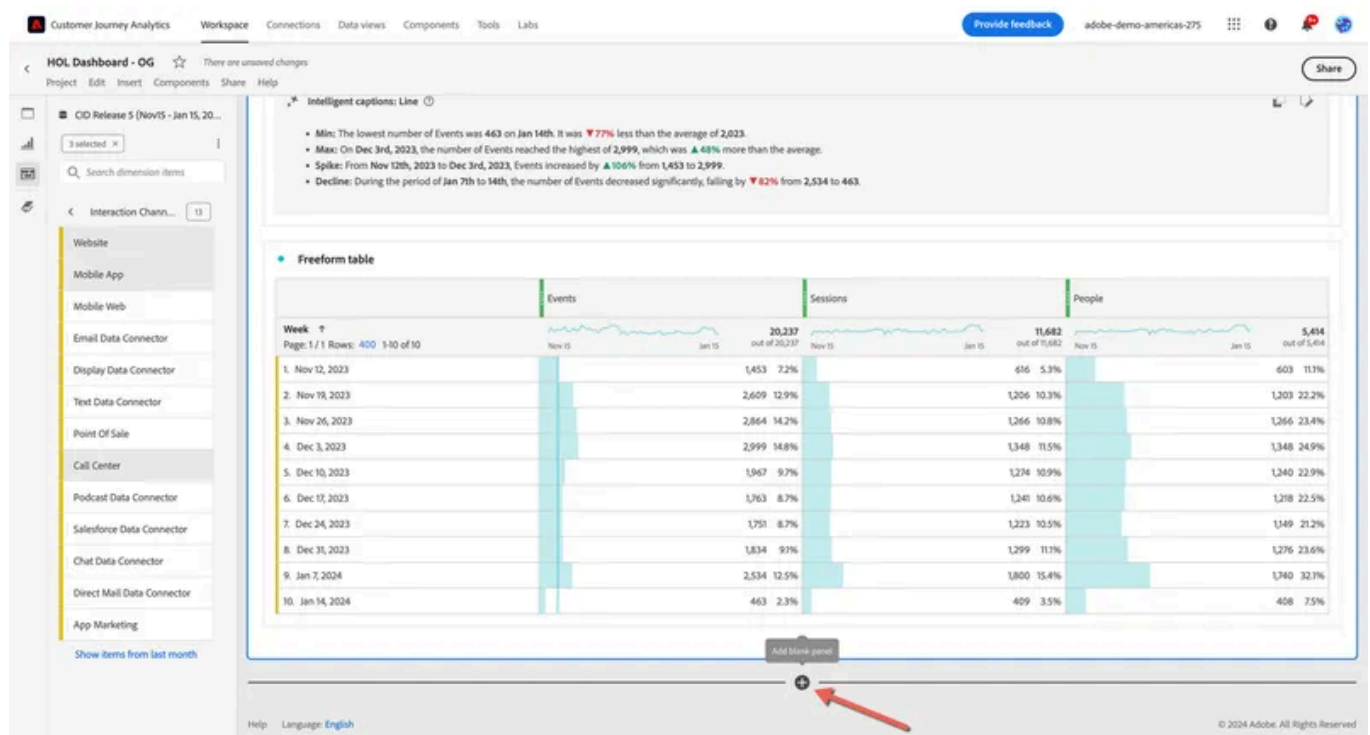
In most cases people think of measuring the influence of marketing touches on driving conversions when talking about attribution. Attribution IQ supports this use case very well, but it can also be used for many other use cases. When used in CJA we can measure the influence that any data point has on driving an event of interest, for example, measure the influence of web pages on driving calls.

Exercise:

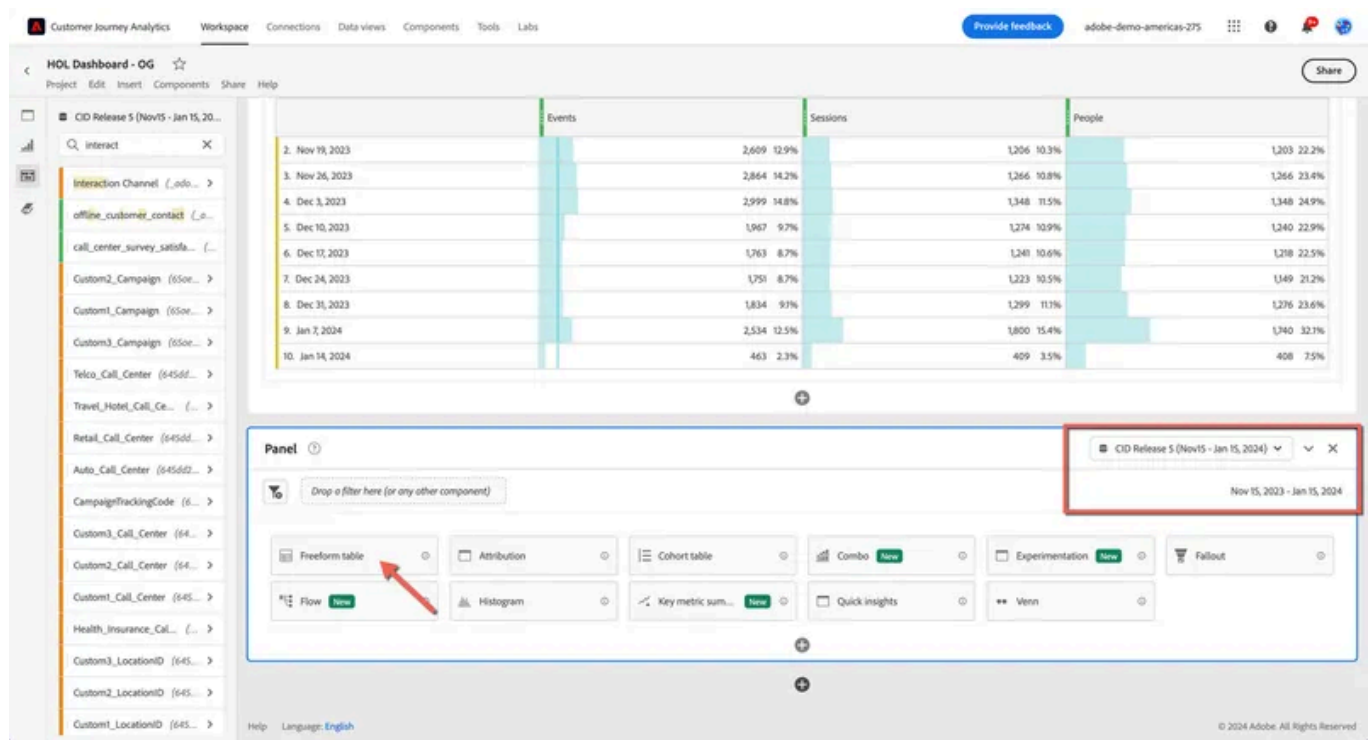
In this exercise we will use CJA to understand how your marketing campaign (email, Facebook, etc) impact your online applications, but also applications that may have been completed offline in a branch or via the call center. As those events are not directly linked (several days can pass between a marketing campaign and an application), we need to define the attribution method.

4.3.1 Analyse the application submission by Marketing channels

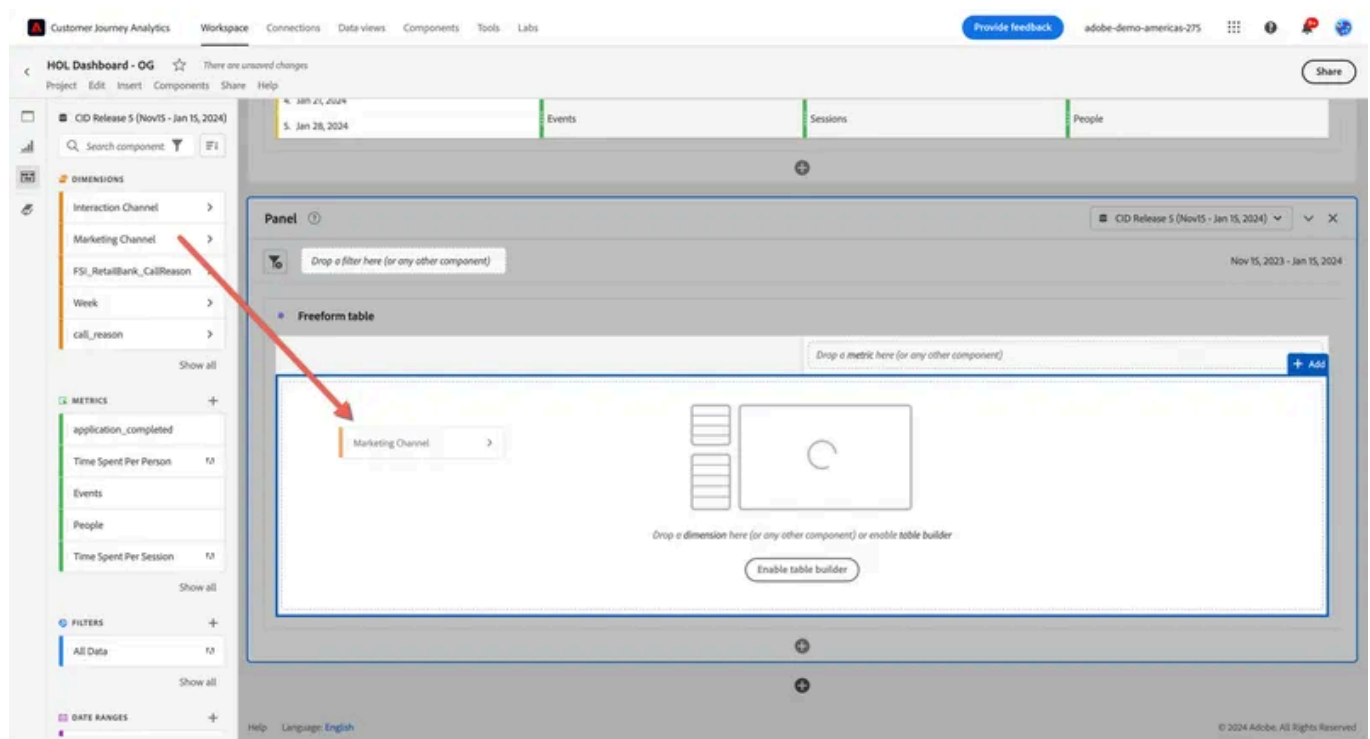
1. Add a **new blank panel** to our dashboard by clicking the **+ icon** at the bottom of our dashboard.



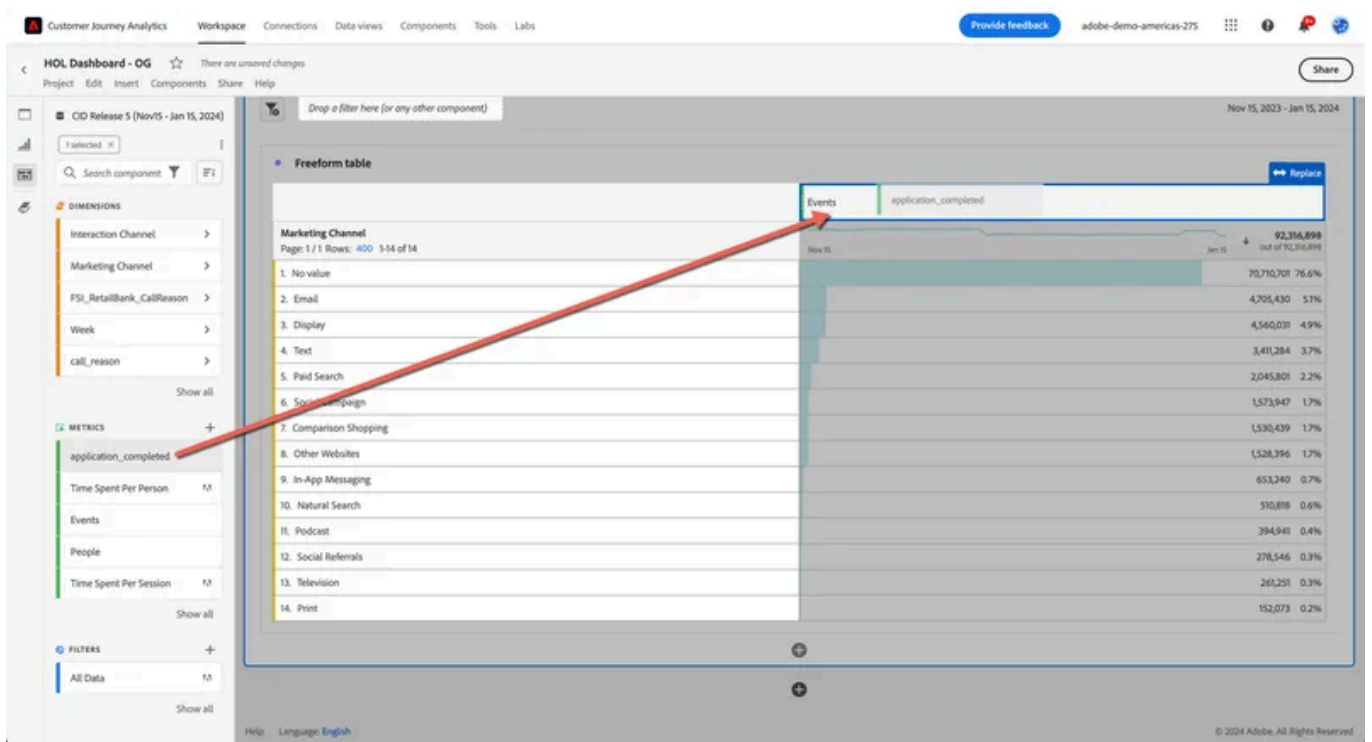
2. Ensure that the **CID Release 5 (Nov15 - Jan 15, 2024)** is selected in the Data View selector and the reporting date range is **Nov 15 2023 - Jan 15, 2024**. Then select the **Freeform** visualisation from the options presented.



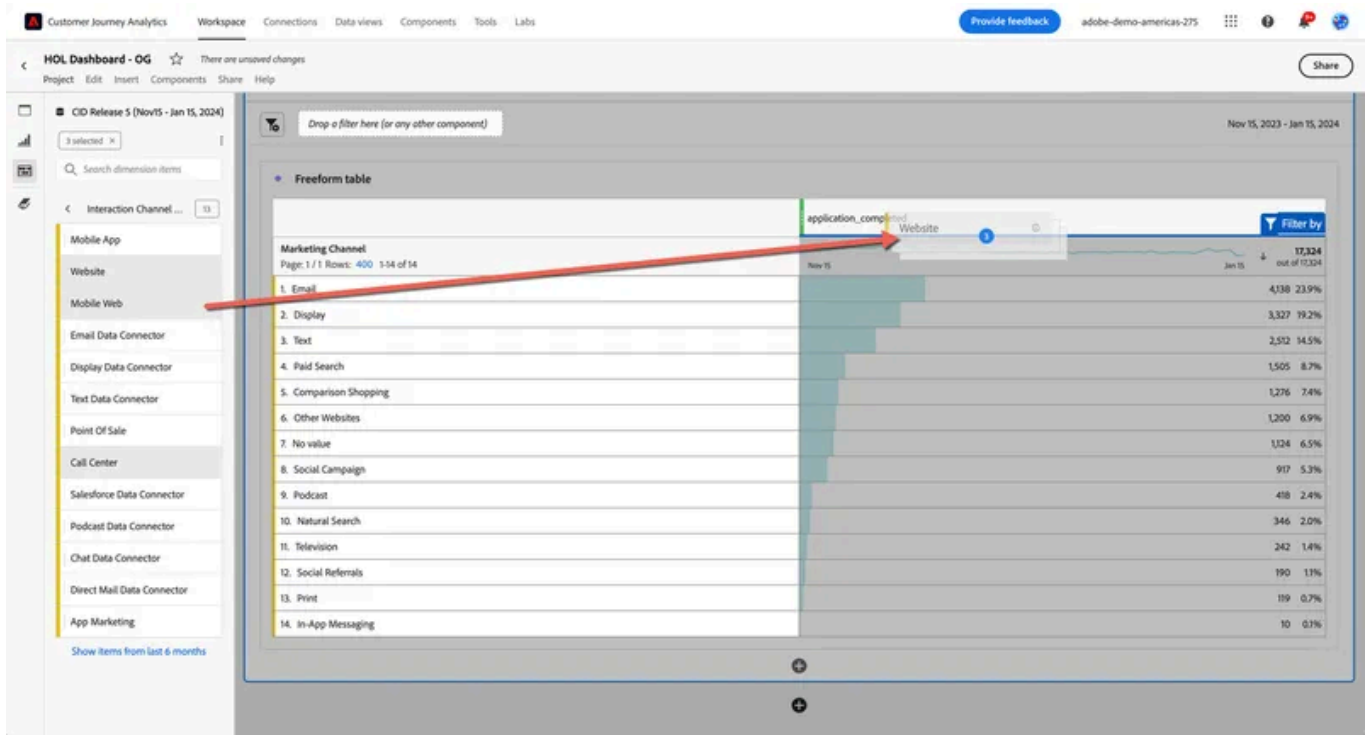
3. Drag & add the dimension **Marketing Channel** to your freeform.

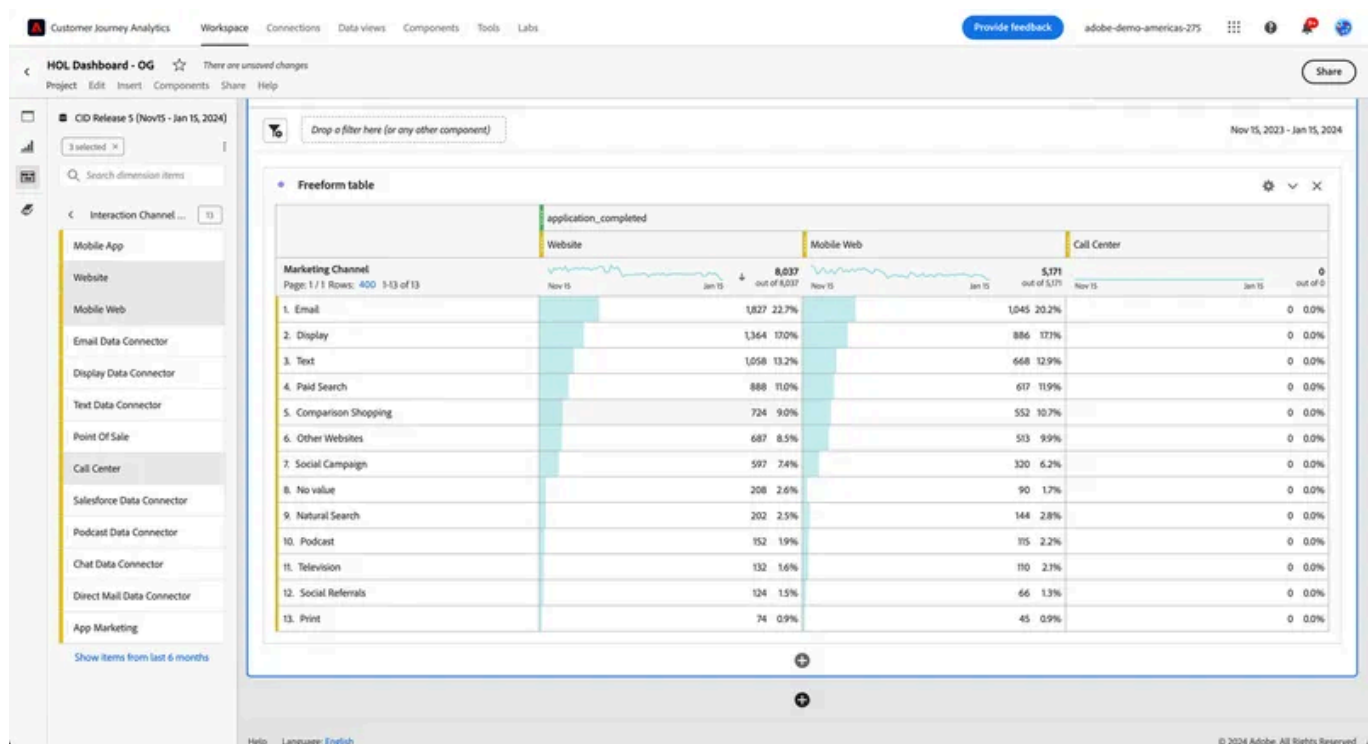


4. Now take the **application_completed** metric and **replace** the default **events** metric in your freeform.



5. You can see we now understand better which marketing channels are attributing to our application submissions. But the data we have in CJA is not just online data, we are also collecting application submissions from offline channels such as the Call Center. Let's break down the submissions here by **Interaction Channel**. Click into the **Interaction Channel** dimension and select (control + select) just the **Website, Mobile Web** and **Call Center** and drag them under the application completed metric.

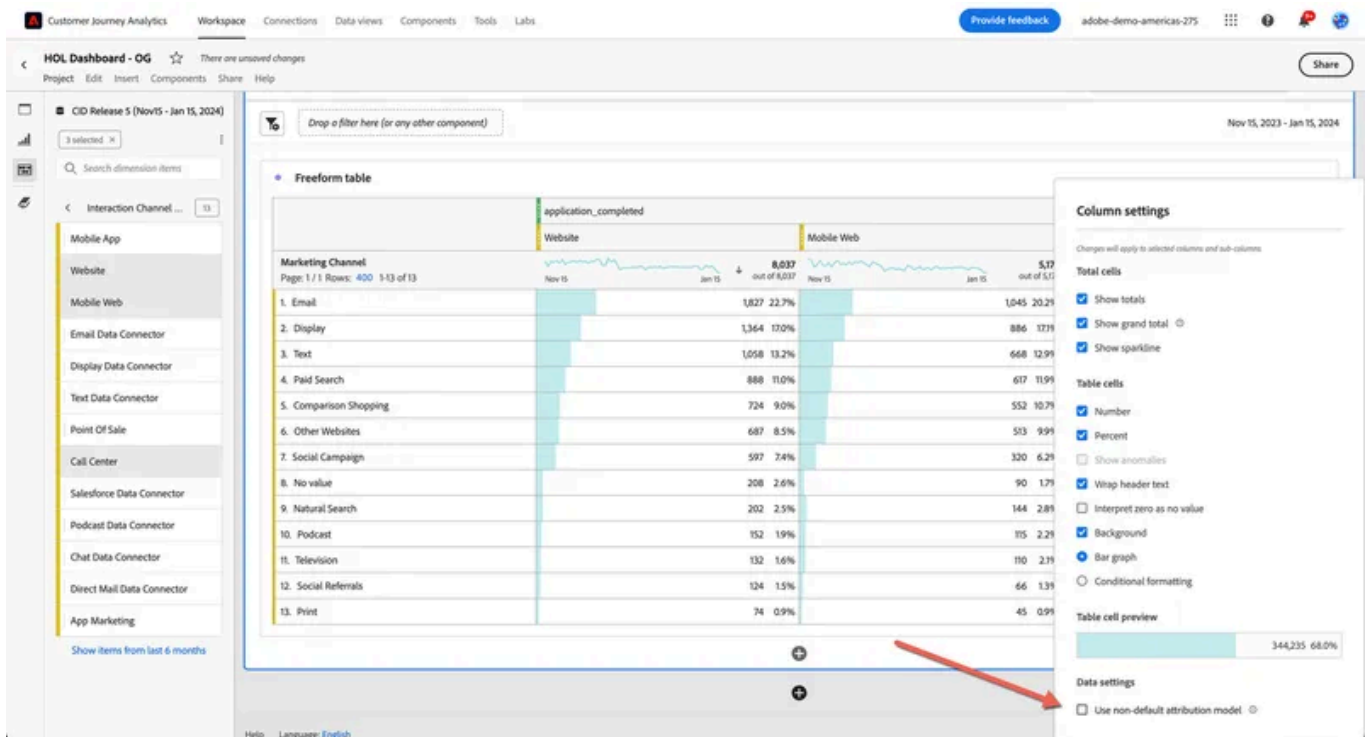




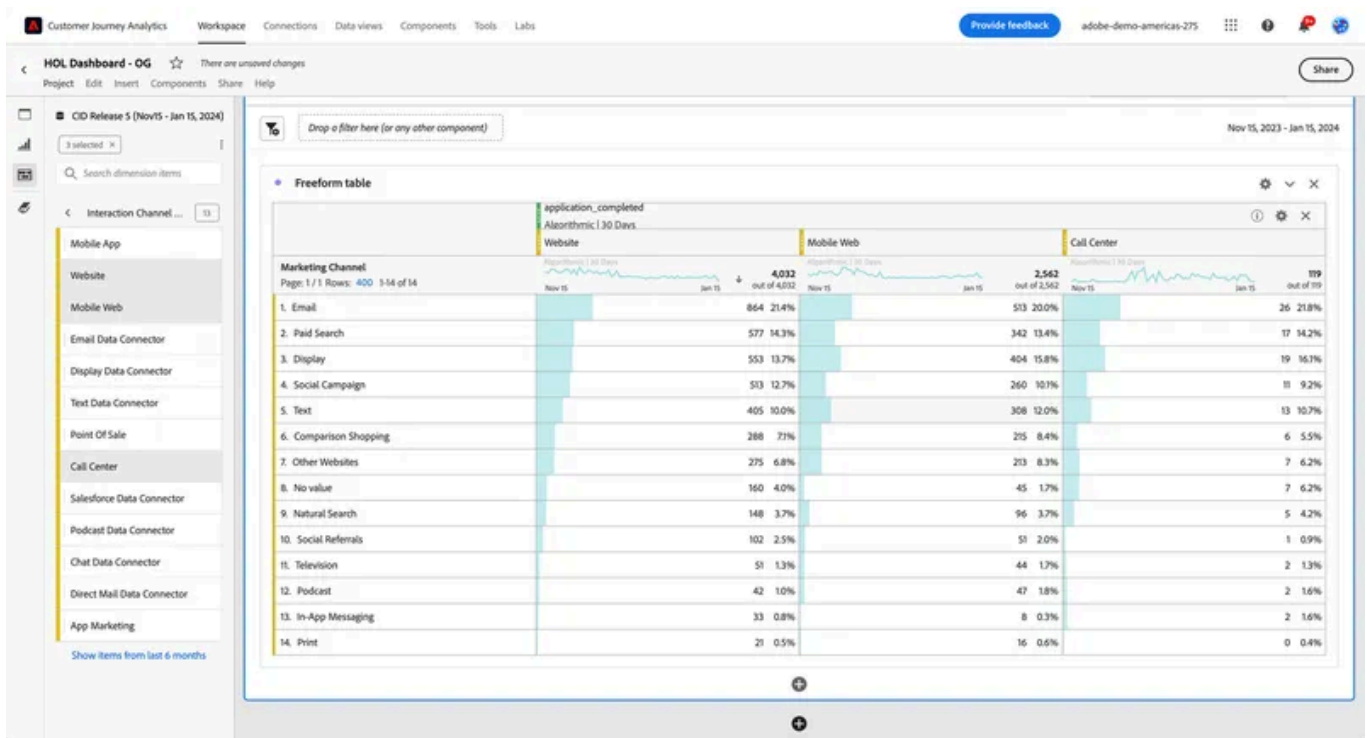
You can see we have applications completed on web and mobile web attributed to our marketing channels but not from the call center. This is because we use **Last Touch Session** attribution here, meaning we will consider that any submission is only due to the last communication your customer received within the same session. But maybe the call happened outside of the standard session time, or what if the customer received multiple communications. Let's see how values change based on the attribution model.

4.3.2 Apply the algorithmic attribution model

1. Click on the **tool** icon in your **application_completed** column. Then select to **Use non-default attribution model**.



2. Select **Algorithmic**, and define **lookback windows at 30 days**. By doing this, CJA will automatically calculate revenue by comparing conversion of people who have received this communication and people who haven't to determine what is the impact.



We can see now that multiple marketing channels have been influencing not only the online conversions but those completing offline also. Providing a more wholistic picture of the impact your marketing actions are having.

Exercise Complete Checklist

- ☐ Able to view application completed by different marketing channels
- ☐ Able to change the attribution model to view the impact of marketing campaigns on non digital channels

Congratulations, this completes the exercise on Attribution

3.2.4. 3.4 Put insights into action

Publishing audiences provides a clear way to activate and to take action on insights found within Customer Journey Analytics. These actions might include:

- Using the audience for a journey in Adobe Journey Optimizer.
- Exporting the audience to a 3rd-party through a CDP destination.
- Enriching the Real-time customer profile with useful attributes derived from event-based data in Customer Journey Analytics.

The audiences you create in Customer Journey Analytics do not have to be based on datasets enabled for profile. You can ingest historical data into Experience Platform without enabling associated datasets and schemas for profile. Then use these datasets to discover relevant audiences in Customer Journey Analytics and publish these audiences to Real-time Customer Profile in Experience Platform for activation purposes.

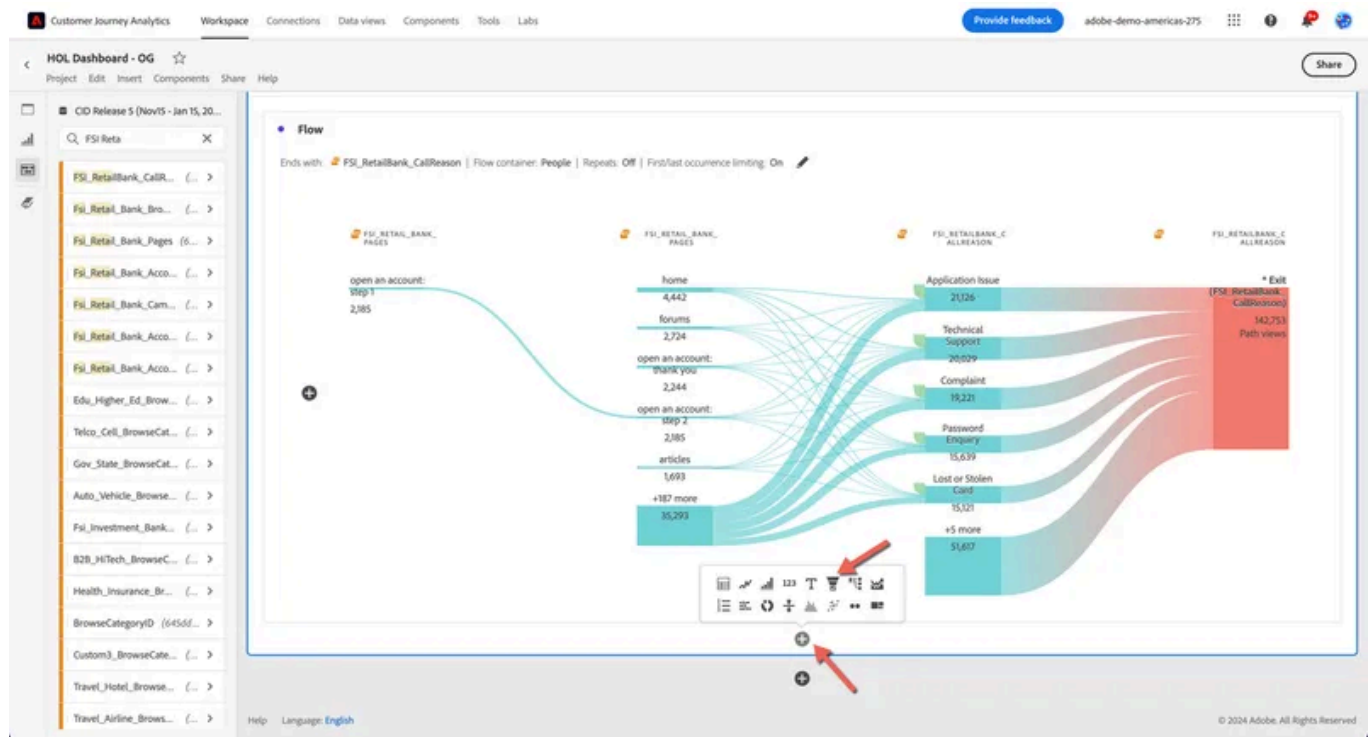
Exercise:

In this exercise, we'll use the application fall out audiences to be shared in AEP for activation via CDP or AJO.

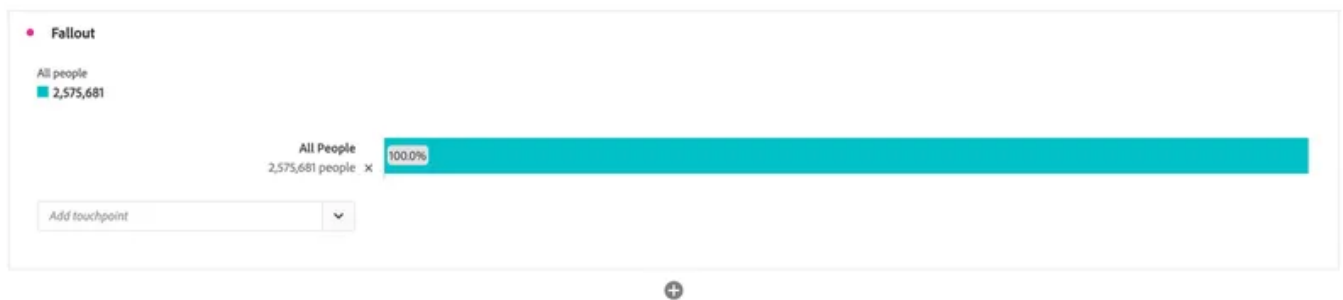
4.4.1 Understand the drop off point for applications to open an account

The Fallout visualisation is great for understanding customer paths when there are specific points or events you want to account for. For example, measuring which customers are starting a journey such as an application to open a new account or credit card, and understand where they drop off.

1. Add a new **visualisation** to your dashboard by clicking the **+** icon inside the panel at the bottom. Select the icon that looks like a **Funnel**

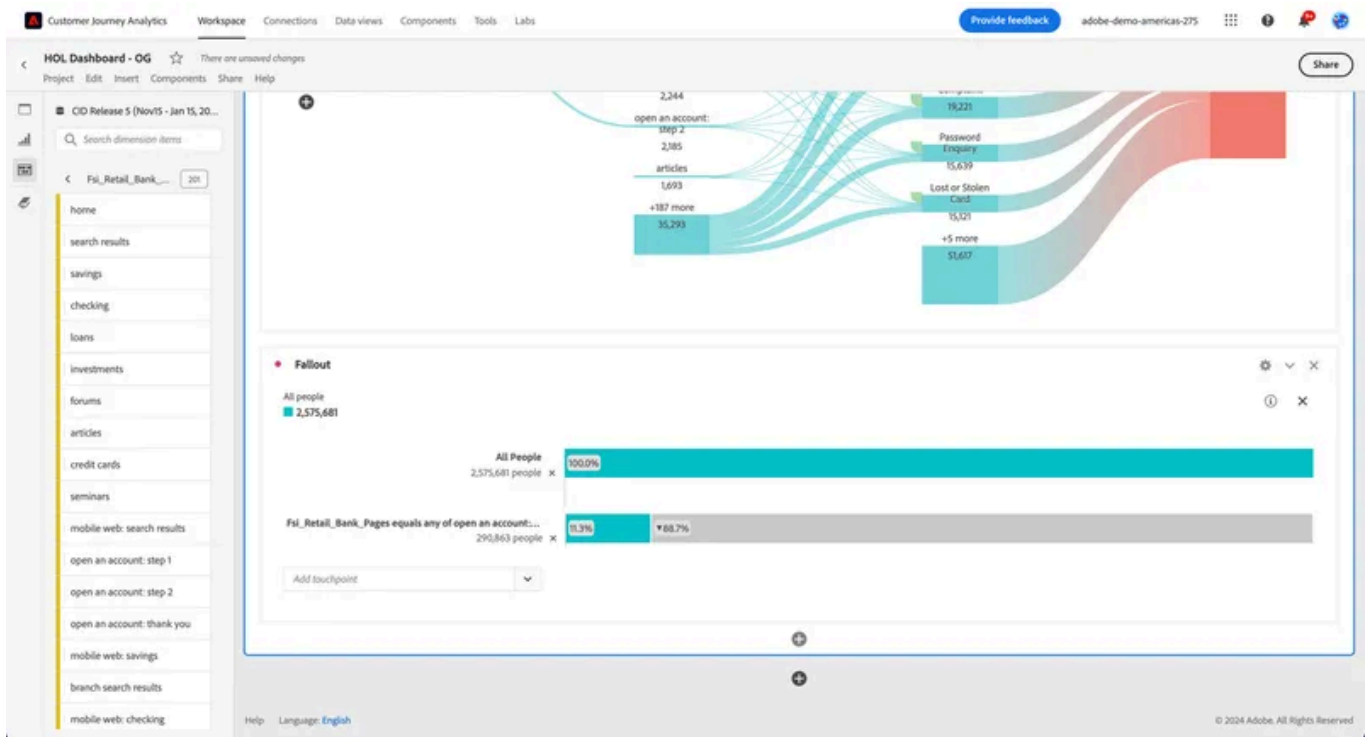


The fallout will start with all people. It then requires you to add the touch points in the process that you want to measure fall-through on as well as fall-out for.



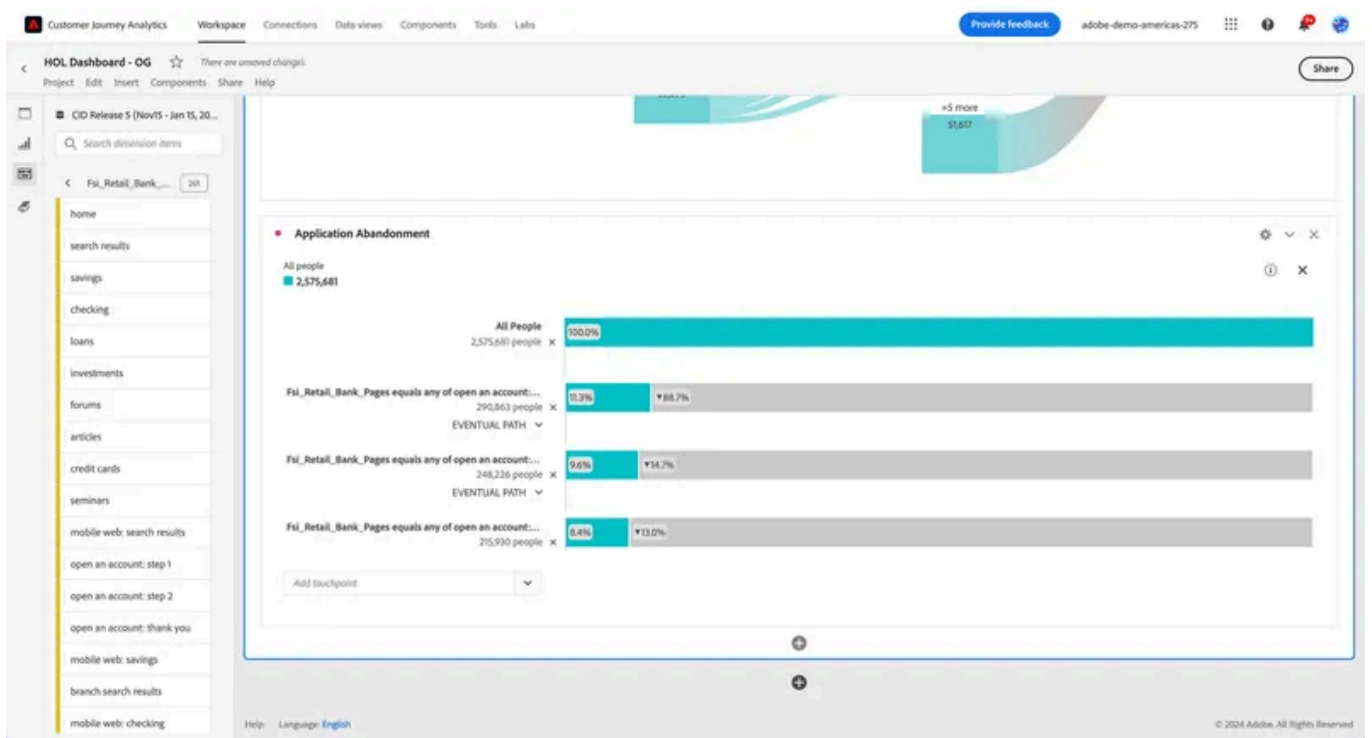
2. From the Components menu, drill into the values for **FSI_RetailBank_Pages** and search for **open**.

- Drag **open an account: step 1** into the Add Touchpoint drop zone, just under **all people**

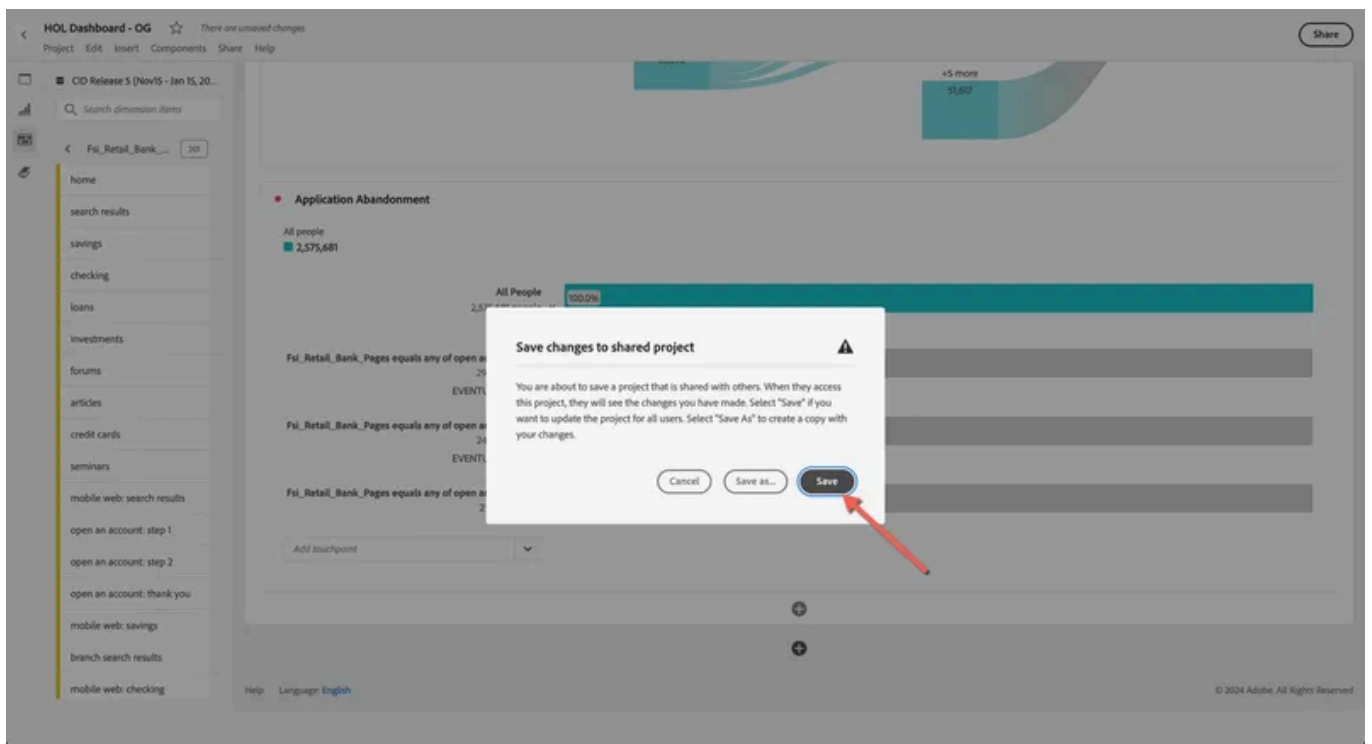


3. Repeat the process for **open an account: step 2** and **open an account: thank you**

4. Rename your fallout to **Application abandonment** (click on Fallout & rename)



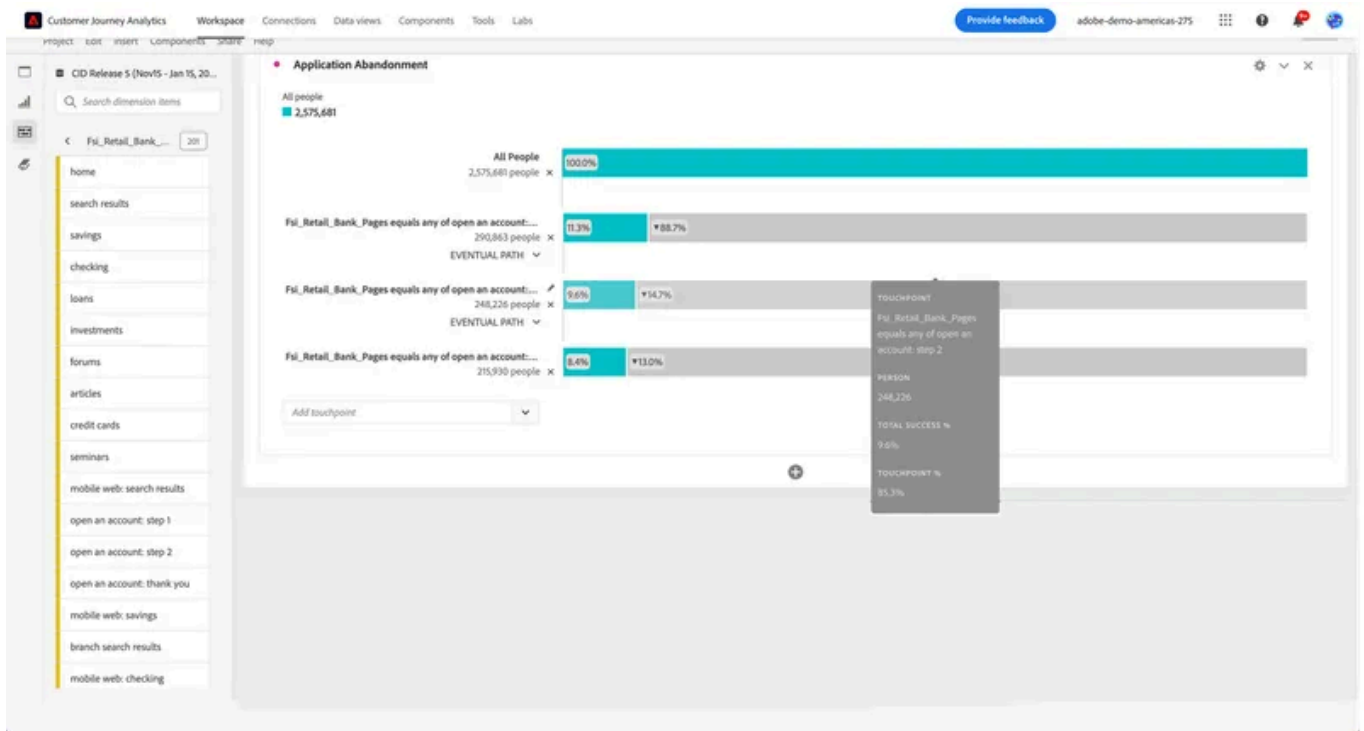
5. Finally hit **Ctrl/Command S** to Save your project.



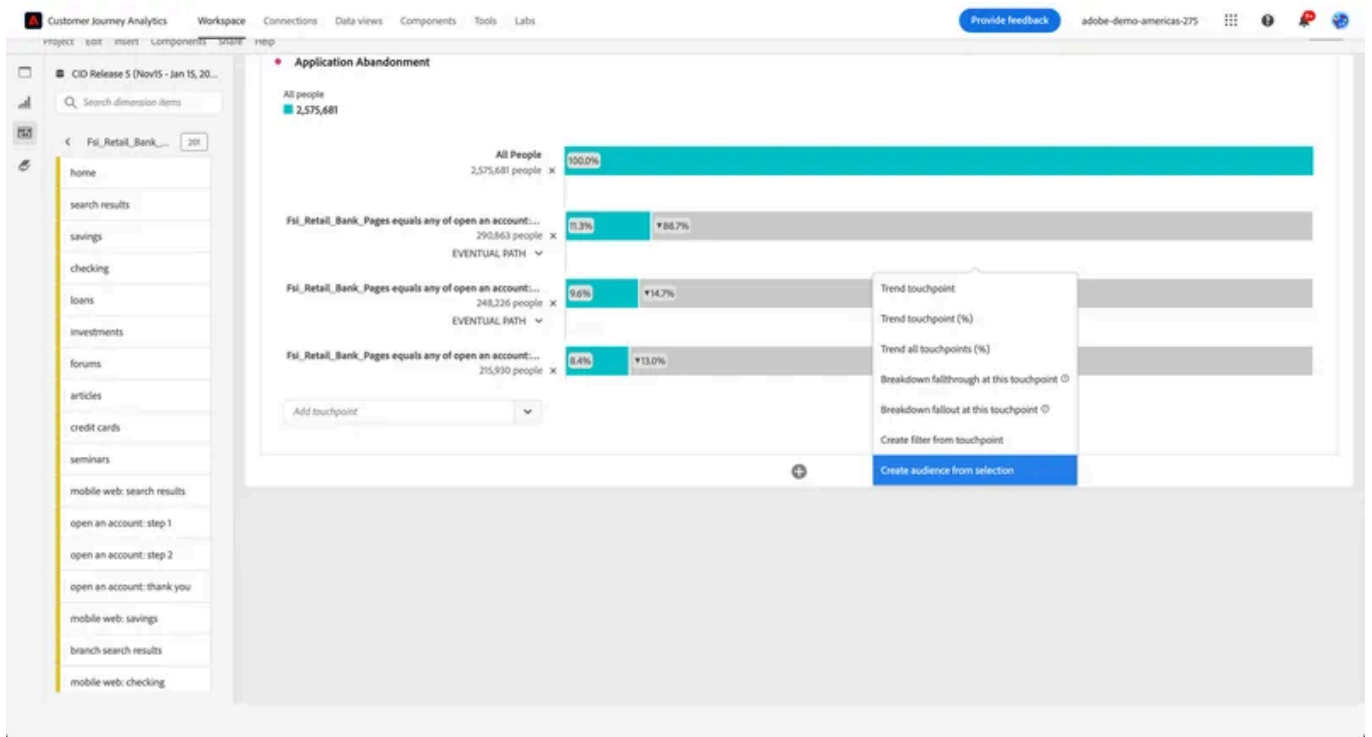
This is a great way to understand if your application process is too complex and need to be optimized.

4.4.2 Create an audience from the fall out

1. Looking at the fallout report, we can see the number of people who fell off the journey at step 2.



2. Right click on the fallout and select to **Create an Audience from Selection**



3. Give your audience a name `<lastname>_ApplicationFallout` . You can see the estimated number of profiles on the right.

The screenshot shows the 'Create audience' dialog in Adobe Customer Journey Analytics. The dialog includes fields for Name, Description, Refresh frequency, and Refresh audience limit. A list of filters is shown at the bottom, including '(All People > Fsi_Retail_Bank_Pages equals any of open an account: step 1 > Fsi_Retail_Bank_Pages equals any of open an ...'. The right sidebar displays the audience size (248K) and estimated return (2).

Create audience

Name: Step 2: Application Fallouts - OG

Description: Type audience description here

Refresh frequency: One time

Refresh audience limit: 0 of 75

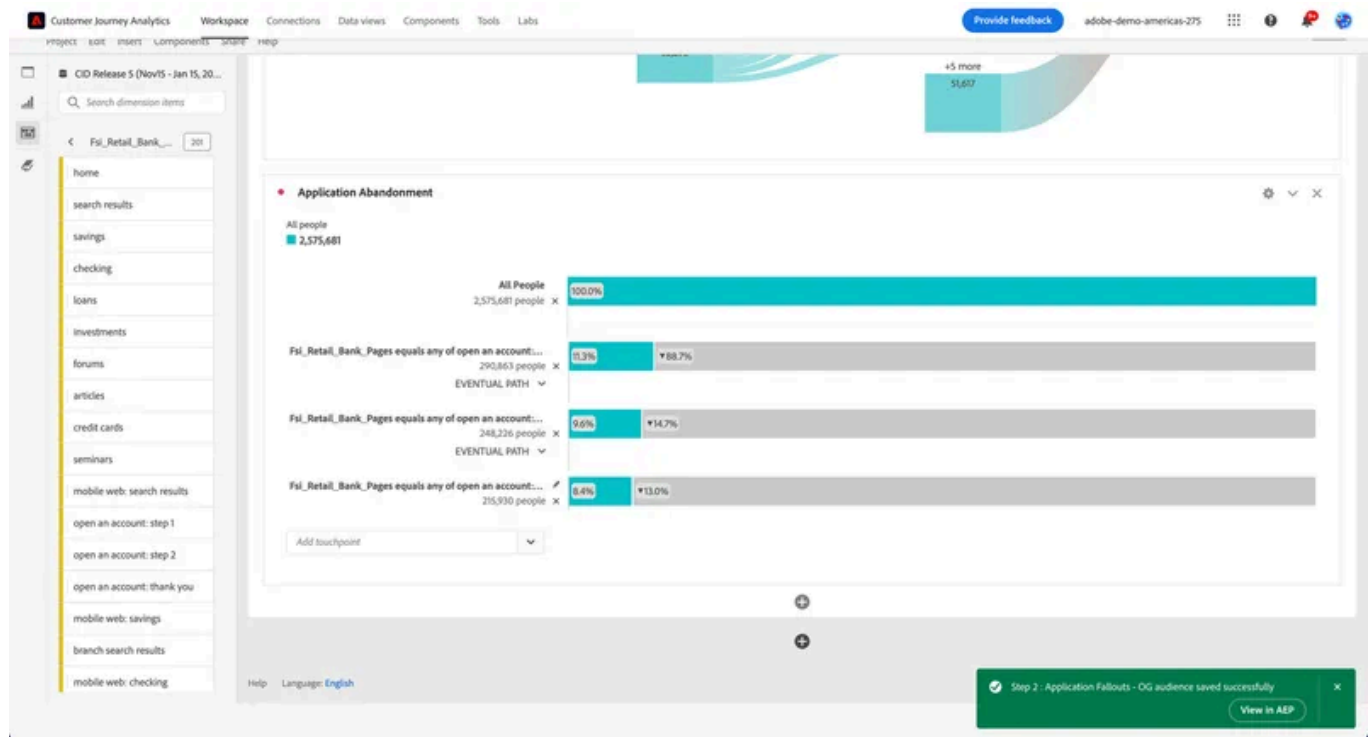
One time date range: 11 / 15 / 2023 - 1 / 15 / 2024

Filter (1 of 20): (All People > Fsi_Retail_Bank_Pages equals any of open an account: step 1 > Fsi_Retail_Bank_Pages equals any of open an ...

Right Sidebar:

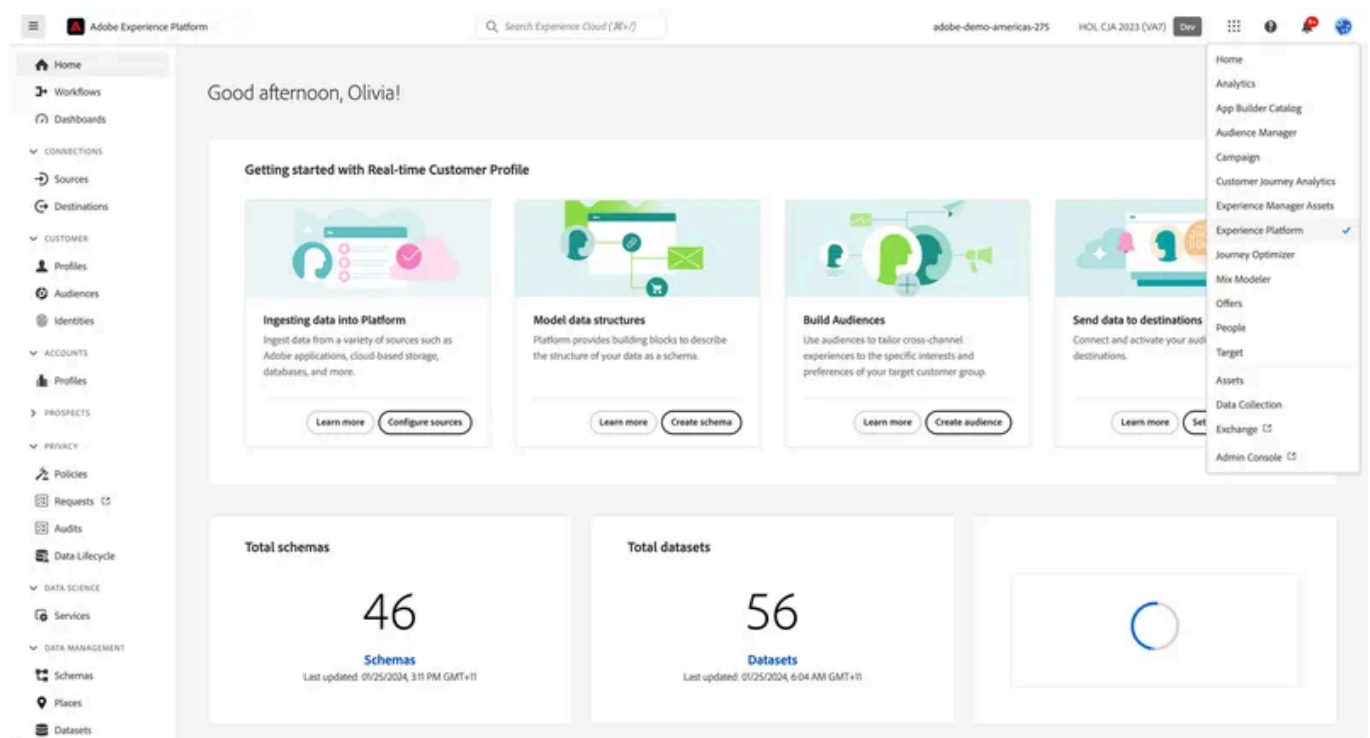
- 248K TOTAL PEOPLE
- Audience size limit: 248K / 20M
- Estimated audience return: Next 7 days
- 2 ESTIMATED TO RETURN
- Preview metrics: Events
- 13M EVENTS
- 149% OF TOTAL EVENTS
- Preview metrics: Sessions
- 835K SESSIONS
- 11% OF TOTAL SESSIONS
- Namespaces included: ECD, Sandbox

4. Finally, click **Publish**.



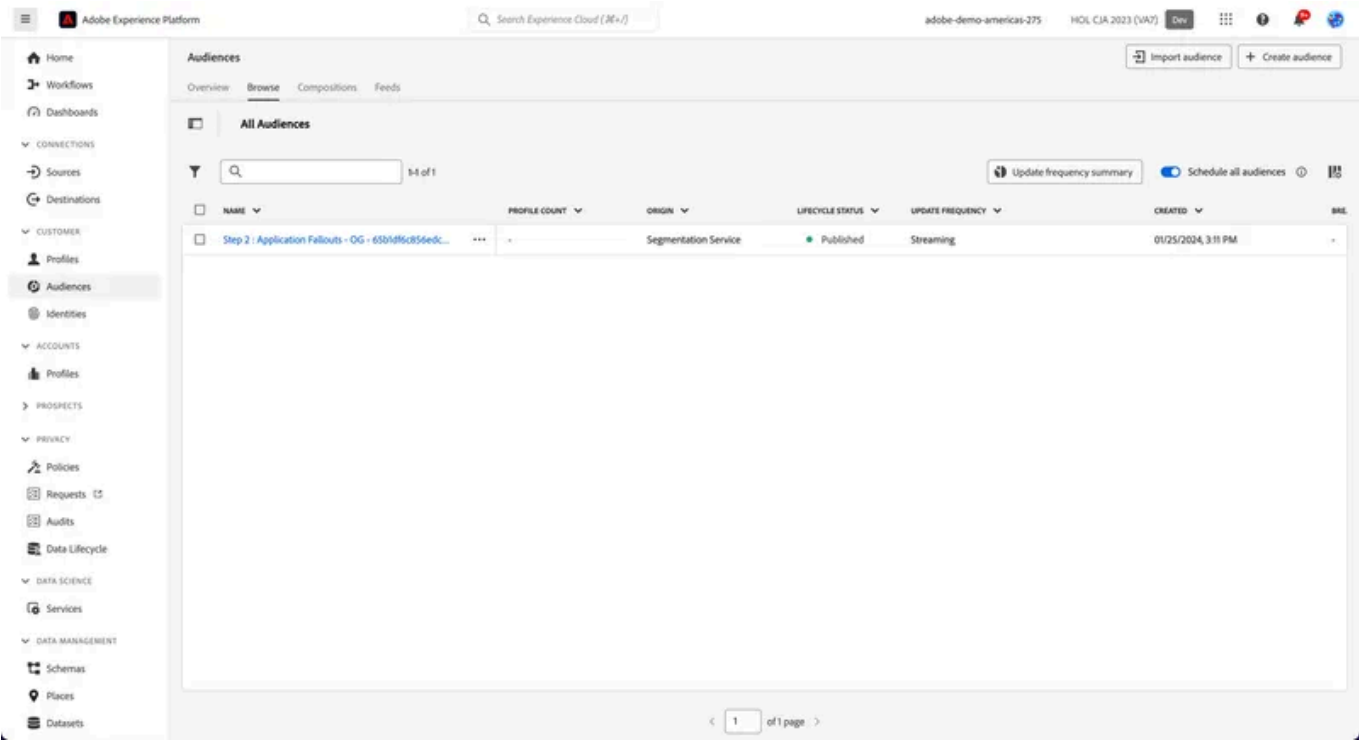
4.4.3 View your segment in Adobe Experience Platform

Click on the View in AEP - green box at the right hand side bottom screen (above screenshot). This will take you to **Adobe Experience Platform**. Change Sandbox to **HOL CJA 2023** (for the purpose of this bootcamp, this is the sandbox where the CJA data was loaded).



Search for your audience - your audience is now visible in the Audiences Screen and ready to activate via a **CDP Destination** or in a Journey or Campaign from **Adobe Journey**

Optimizer.



Exercise Complete Checklist

- ☐ Able to create & publish an audience from CJA fall out chart
- ☐ Able to view the audience in AEP for further activation

You have now seen how insights determined from looking at historical behaviour in Customer Journey Analytics can also be used to activate across your marketing destinations and channels.

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