

Adobe Customer Journey Analytics B2B

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1. Adobe Customer Journey Analytics B2B

Hello Team!

Welcome to the **Adobe Customer Journey Analytics B2B Edition** Hands-on Lab!

Customer Journey Analytics B2B Edition adds **account-based reporting and analysis**. In B2B (business-to-business) sales, the purchase journey involves multiple parties, online and offline touchpoints, and key stages before closing a deal. B2B companies need to track all these interactions in a unified journey view to effectively analyze and optimize their marketing efforts and account experiences.

Typical B2B sales characteristics are:

- large transaction amounts
- long sales cycles
- multiple decision makers and influencers, usually forming a "buying group"
- more educated buyers
- increased importance on customer retention and upsell
- millennial B2B buyers expect a more seamless "digital consumer" like buying experience

B2B marketing focuses on optimizing touchpoints and reducing the purchase and consideration cycle. Since B2B sales cycles rely heavily on in-person meetings, offline interactions such as live events, and working with buying groups, digital person-based data alone isn't enough. B2B organizations supplement this with data from CRM systems and specialized solutions. Yet traditional B2C marketing components, like reads, campaigns, channels, and site visitors still play a crucial role in B2B marketing.

B2B sales and marketing have evolved beyond traditional lead generation funnels to focus on customer lifecycles and buying groups. This shift reflects the changing nature of B2B purchasing, where decisions involve multiple stakeholders across various touchpoints. Today's B2B buyers follow a complex, non-linear decision-making process.

B2B marketers face growing pressure to demonstrate how their activities contribute to revenue generation. While aligning marketing efforts with business goals and measuring

revenue impact is crucial, many measurement tools are designed for B2C scenarios. As a result, B2B marketers are seeking dedicated tools that provide accurate insights and align with their specific objectives.

Customer Journey Analytics B2B Edition helps B2B companies align their marketing, sales, and product teams by providing actionable account insights that drive revenue growth. With the account placed at the center of the data model, all analysis focuses on the account journey. Adding a new layer of entities (accounts, opportunities, and buying groups) on top of person and time-based events, creates a complete picture of the B2B marketing and revenue lifecycle.

Our goal is to help you gain practical knowledge that you can apply to your business, from data integration to activating experiences. We encourage you to ask questions, participate in lab exercises, and make the most of this collaborative learning environment.

Let's get started!

2. Lab Access

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

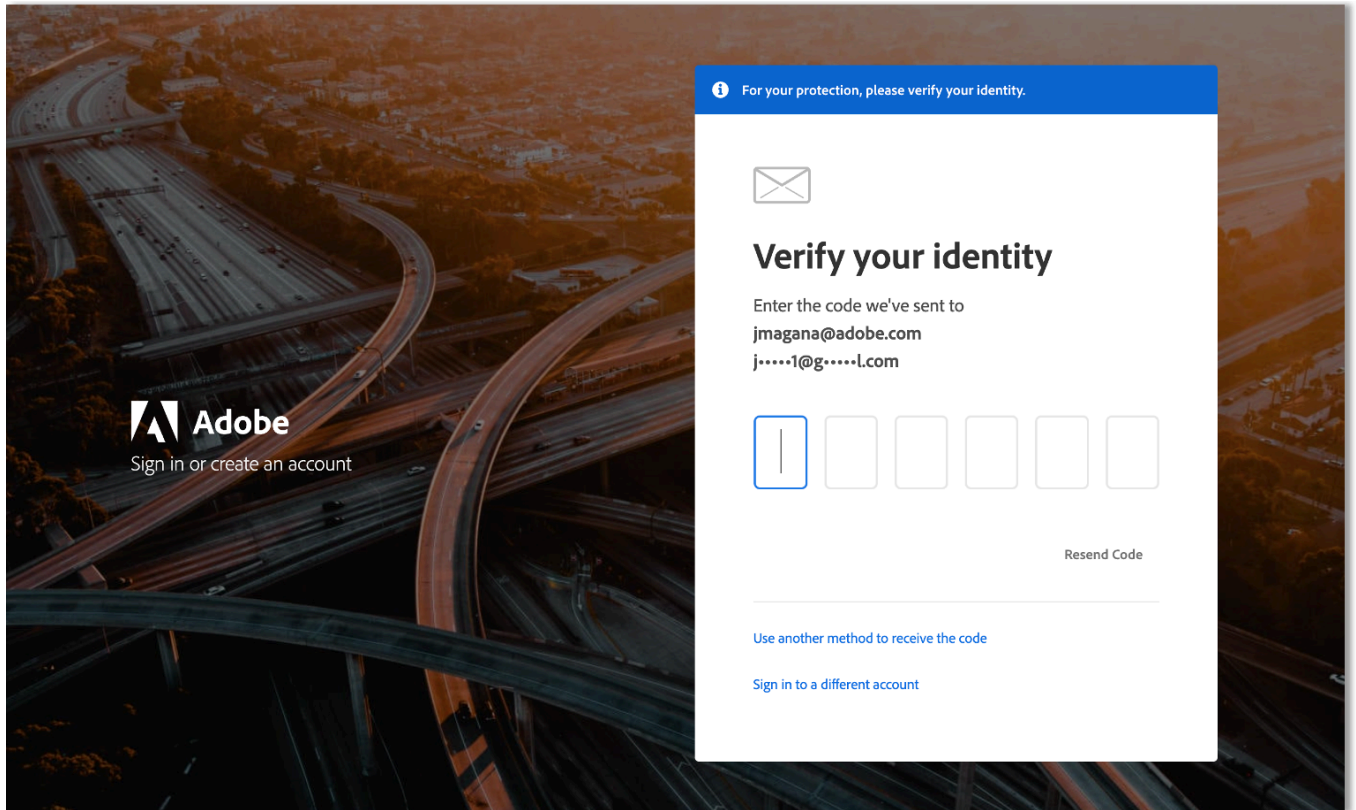
<https://platform.adobe.com/>

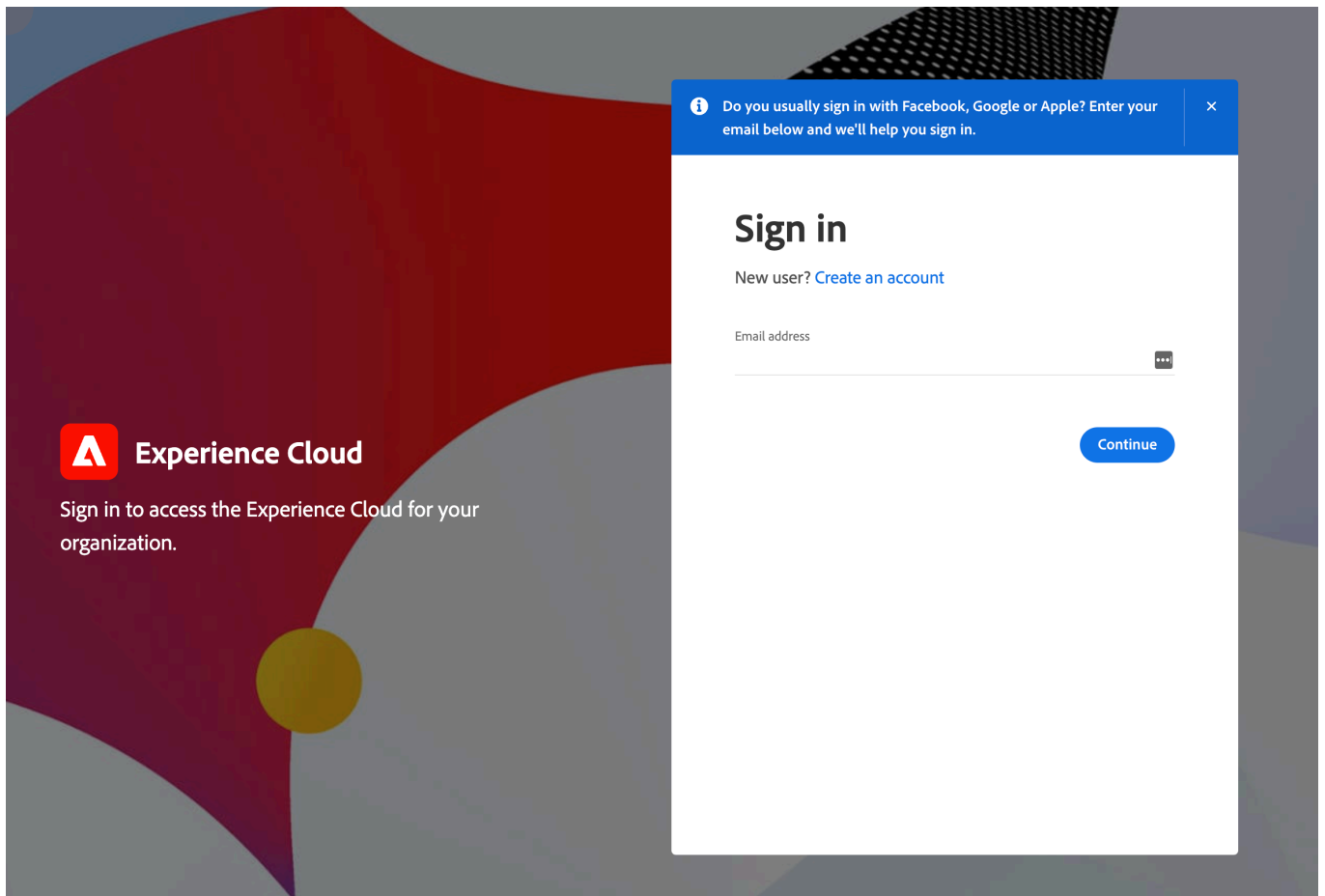
Access Credentials: Please use the credentials assigned to you below to log into platform

Everyone has the same Password: **PASSWORD**

❗ If asked to send a verification code, please proceed. You should see a screen like this. Please give a few minutes and we will provide you the verification code via the chat per your username as assigned on the credentials table above.

Do not enter your mobile number, if prompted.





If you're asked to add in any additional data or to add a mobile number as part of your sign-in, **please ignore these prompts** and if allowed skip or otherwise ignore or complete the step with the defaults. If you have problems logging in, alert your presenter immediately.

3. Post-Lab Resources

Lab Recording, Resources & Survey

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

Adobe Experience Platform Documentation:

[Experience League Documentation](#)

HOL Presentation:

Day 1 Recording:

Day 2 Recording:

HOL Survey:

4. Schema

4.1. Schemas in CJA B2B

5. Connection

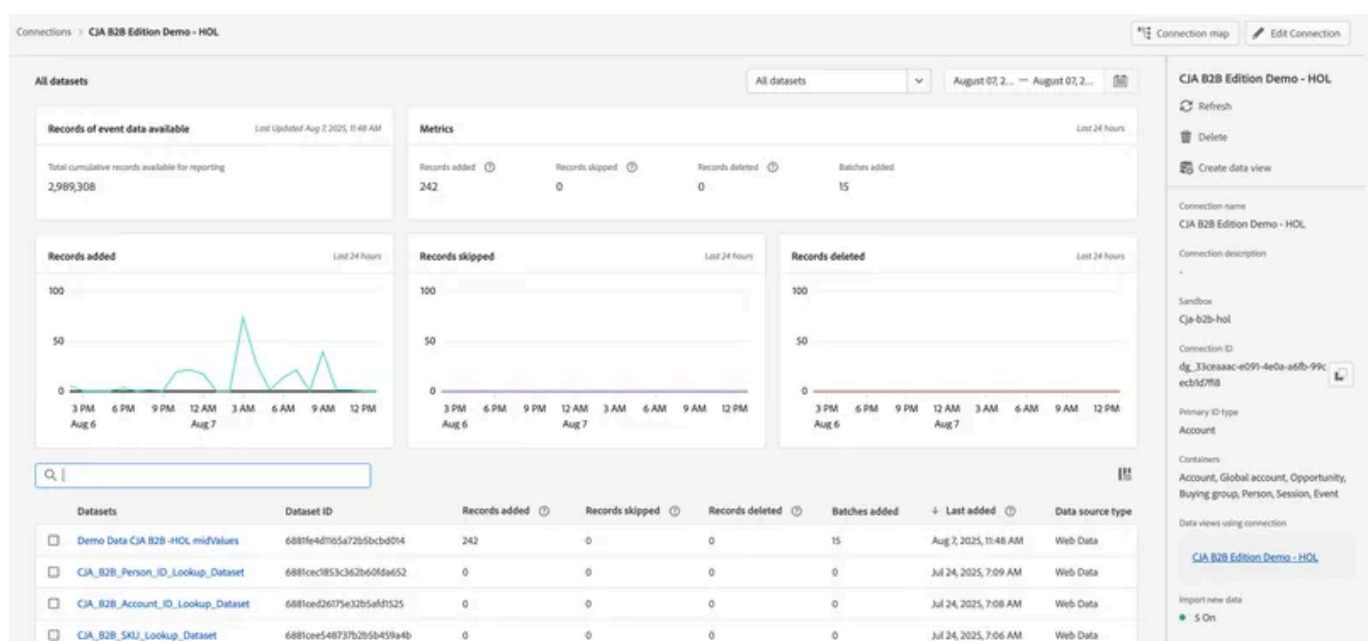
5.1. Connections Demo

Connection for B2B Data

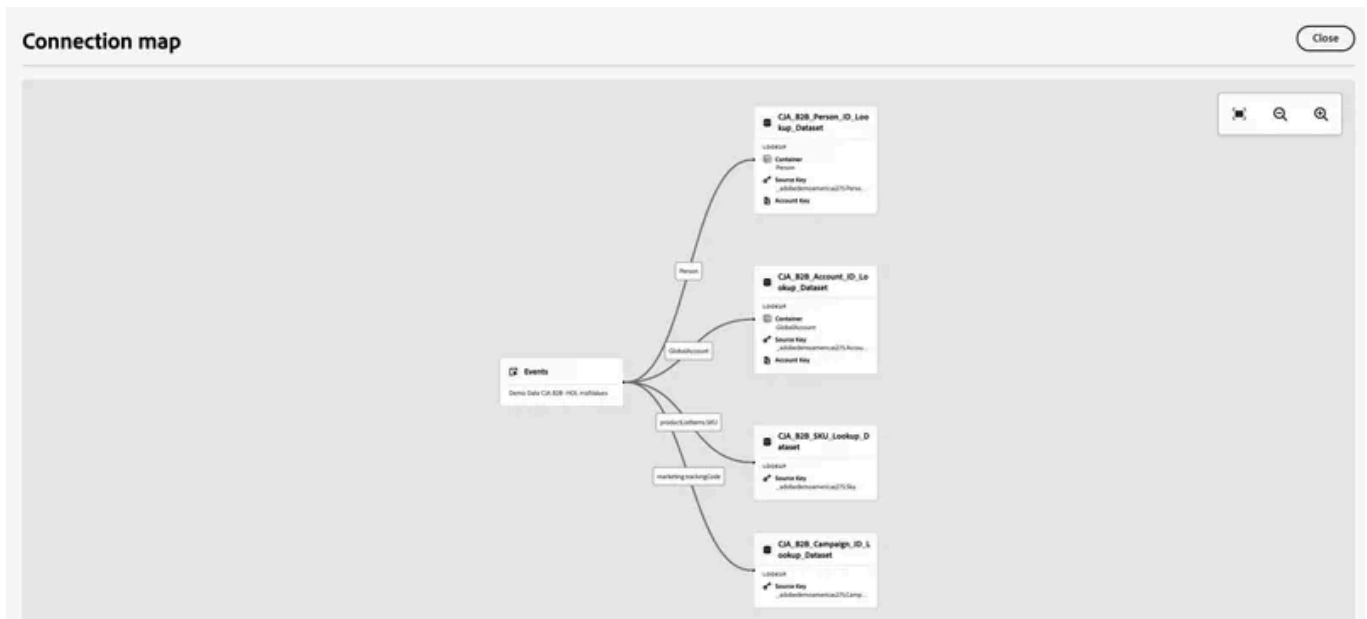
Event, Person, and B2B datasets can be ingested in to a connection using matching keys or containers to join B2B data together. This can contain multiple rows for a single person identifier. Person-based lookups only match the most recent occurrence of that person identifier, preventing a proper person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

Connections Demo

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



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



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

Edit dataset: Demo Data CJA B2B -HOL midValues

Cancel Apply

Demo Data CJA B2B -HOL midValues Remove

Account ID *

Subsidiary Account ID ✓

Global Account ID *

Account ID ✓

Opportunity ID *

Opportunity ID ✓

Buying Group ID *

Buying Group ID ✓

Person ID *

User ID ✓

Timestamp *

Timestamp ✓

Data source type *

Web Data ✓

Import new data

Import all new data

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

Dataset backfill

Backfill all existing data

Batch status: Staging

Dataset ID: 6881fe4d765a7285bcbd014

Description: Analytics Data Connector for report suite Demo Data CJA B...

Number of records: 5,803,848

Schema: [sgezhooonwscicjab2b-Schema](#)

Dataset: [Demo Data CJA B2B -HOL midValues](#)

Preview: Demo Data CJA B2B -HOL midValues

100 of 100

timestamp	_id	_experie...	_experie...	_experie...	_experie...	_experie...	_experie...	_experie...	_experie...
173505...	344125...	175336...	465252...	Buena ...	465252...	833554...	Internal	CRM	Bottom...
173508...	34415D...	175339...	-	-	-	-	Display...	Display...	Top of ...
173508...	34415D...	175339...	-	-	-	-	Social ...	Social ...	Top of ...
173508...	34415D...	175339...	-	-	-	-	Display...	Display...	Top of ...
173505...	344133...	175337...	-	-	-	-	Web	Web D...	Top of ...
173505...	344133...	175337...	-	-	-	-	Web	Web D...	Top of ...

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

Cancel

Apply

LOOKUP DATASET

CJA_B2B_Account_ID_Lookup_Dataset

Remove

Key *

Account_ID

✓

▼

Matching key type ⓘ
☐ Match by field ☒ Match by container

Matching key *

Global Account

✓

▼

Global Account field *

Account_ID

✓

▼

Data source type *

Web Data

✓

▼

Import new data ⓘ
☒ Import all new data

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

Dataset backfill ⓘ
☐ Backfill all existing data

Backfill starts at save: No backfill

Batch status Success

Dataset ID 6081ced26175e32b5afdf525

Description -

Number of records 0

Schema [CJA_B2B_Account_ID_Lookup](#)

Dataset [CJA_B2B_Account_ID_Lookup_Dataset](#)

Preview: CJA_B2B_Account_ID_Lookup_Dataset

First 100 rows

Q

100 of 100

⌵

_idobed...	_idobed...	_idobed...	_idobed...	_idobed...	_idobed...	_idobed...	_idobed...	_idobed...	_idobed...
196266...	2051212...	High	9	Miami	United ...	954-33...	33569	Medium	6
430415...	6557444	High	7	SONKA...	Finland	046 65...	74300	Low	3
324644...	1899152...	Medium	5	Ellwoo...	United ...	724-75...	16117	Medium	4
720290...	1394815...	Medium	5	Wmnewil	Switzer...	031 412...	3184	Low	3
80660...	450046	Low	3	Belo H...	Brazil	(31) 22...	30855...	Low	1
300362...	95218113	High	7	West N...	United ...	317-856...	46183	Low	3

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

Edit dataset: CJA_B2B_SKU_Lookup_Dataset

LOOKUP DATASET

CJA_B2B_SKU_Lookup_Dataset

Key *

SKU ✓ ▾

Matching key type ⓘ

☒ Match by field ☐ Match by container

Matching key *

SKU (Event datasets) ✓ ▾

Global Account field *

Select global account field ▾

Data source type *

Web Data ✓ ▾

Import new data ⓘ

☒ Import all new data

Dataset backfill ⓘ

☐ Backfill all existing data

Batch status Success

Dataset ID 6881cee548737b2b5b459a4b

Description -

Number of records 0

Schema CJA_B2B_SKU_Lookup

Dataset CJA_B2B_SKU_Lookup_Dataset

Preview: CJA_B2B_SKU_Lookup_Dataset

First 100 rows

Q

100 of 100

⌵

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

5.2. B2B Containers in Connections

Connections and identifiers

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

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

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

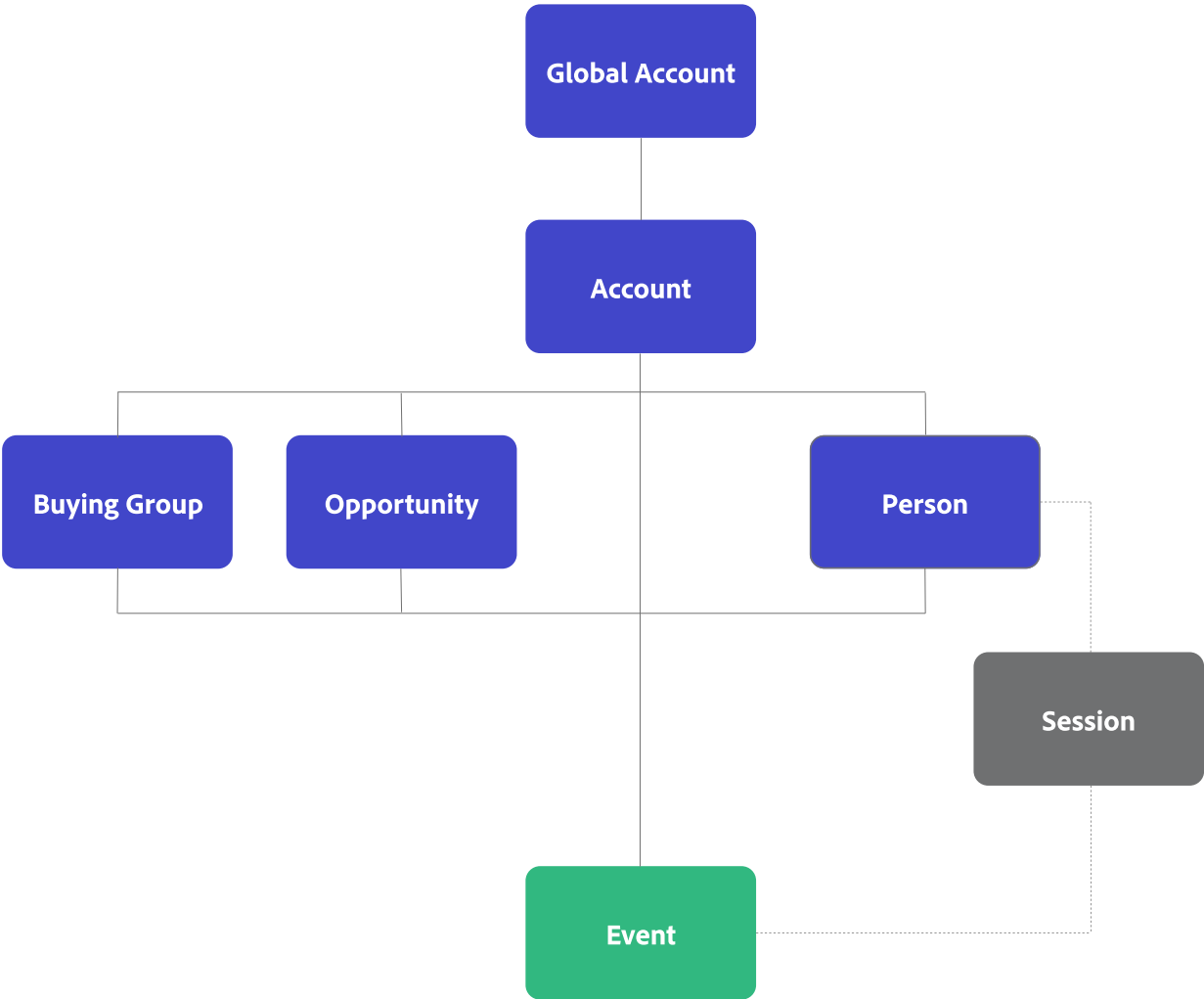
Containers

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

B2B containers

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

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



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

6. Data Views

6.1. Data Views

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

Data Views Demo

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

...

X

X

X

X

X

X

X

X

X

is reserved.

Schema field name

Negotiations Started

Dataset type

Event

Dataset

Demo Data CJA B2B -HOL
midValues

Schema data type

Double

Component ID

_experience.analytics.event
1to100.event29.value

Schema path

_experience.analytics.event1to100
.event29.value

Data Usage Labels

--

☐ Hide component in reporting

> FORMAT ?

> BEHAVIOR ?

> INCLUDE EXCLUDE VALUES ?

> METRIC DEDUPLICATION ?

> ATTRIBUTION ?

- Review the capabilities of Dimension Settings:

- Substring Data
- Behavior Definition
- No Value Options
- Include or Exclude Values
- Persistence

	Schema field name	
	Marketing Channel	
	Dataset type	
	Event	
	Dataset	
	Demo Data CJA B2B -HOL midValues	
	Schema data type	
	String	
	Component ID	
	_experience.analytics.custo mDimensions.eVars.eVar8	
	Schema path	
	_experience.analytics.customDim ensions.eVars.eVar8	
	Data Usage Labels	
	--	
	☐ Hide component in reporting	
	> SUBSTRING (?)	
	> BEHAVIOR (?)	
	> NO VALUE OPTIONS (?)	
	> INCLUDE EXCLUDE VALUES (?)	
reserved.	> PERSISTENCE (?)	



7. **Workspace Project**

7.1. **Completed Project**

Click below to download a PDF of the Workspace with all the exercises completed:

