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Adobe Campaign

Operational Readiness Playbook

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Playbook Objective

The objective of this document is to get your business operationally ready for the implementation and deployment of Adobe Campaign. This will help you and your organisation – as a new Adobe Campaign user – to drive maximum value from your investment in Adobe technology.

Although we have seen many projects succeed, others have faltered due to a lack of internal investment in the business to ensure they are operationally ready to adopt this new technology. This playbook will help guide you to avoid some of the common areas we have identified as missing in less successful implementations.

The recommendations and best practices in Adobe playbooks are ideally intended to be applied to your business **in parallel** to your technology solution deployment, to ensure that by the time you go live with your solution your business is best positioned to realise value from your investment.

Adobe playbooks use a common digital governance structure focusing on the key areas of leadership, strategy, people, product and process to deliver a robust approach to readying your business whether you are deploying one Adobe solution or multiple.

This playbook should be read by:

- Chief Marketing Officer
- Head of Digital, Head of Strategy, Head of Marketing, Head of Customer Insights
- Head of Channels, Digital Analyst Lead, Digital Channel Analyst, Digital Channel Manager
- Solution Architect, Head of Implementation, Digital Implementation Lead
- Program Manager, Project Manager, Business Analyst

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1 Introduction

1.1 About Adobe Campaign

Adobe Campaign provides marketers with a campaign management platform to help redefine the way they engage with each and every customer. The way Adobe helps achieve this is not simply by facilitating the design, execution and measurement of campaigns across channels, but by delivering offers, messages and ultimately experiences that are consistent, relevant and uniquely tailored to the customer's context, needs, preferences and behaviour. Adobe Campaign executes and delivers through multiple channels, including email, direct mail, call centres, the Web browser, point of sale systems, social networks, mobile SMS and mobile apps.

Adobe Campaign technology was recently recognised by Gartner in its Multi-channel Campaign Management Magic Quadrant where it ranked "a visionary" and Forrester's Cross-Channel Campaign Management Wave Report ranked it a leader in the marketing campaign management space.

The following five key topics are ways which Adobe Campaign can help businesses turn marketing challenges into revenue opportunities:

- *Simplifying daily tasks* such as managing data, automating processes and monitoring performance.
- *Discovering customers' needs* with a single marketing view of their behaviour, preferences and activities throughout multiple channels.
- *Accelerating marketing processes* to achieve better productivity and reach customers in real time.
- *Delighting customers* by delivering superior, relevant and personalised experiences.
- *Creating value* for both your business and your customers.

1.1.1 Adobe Campaign Capabilities

VISUAL CAMPAIGN ORCHESTRATION	INTEGRATED CUSTOMER PROFILES	TARGETED SEGMENTATION
Intuitively design and automate customer experiences across channels, from one-off campaigns to triggered messages, with a graphically rich interface.	Transform customer engagement and marketing experiences with a unified view of the customer as they move across online, mobile, and social channels.	Use centralised customer profile to enable companies to more effectively target customers and prospects by creating personalised experiences for each customer.

CROSS-CHANNEL CAMPAIGN DELIVERY	REAL-TIME INTERACTION	OPERATIONAL REPORTING
Achieve top delivery rates, strengthen your sending reputation and maintain positive customer engagement with better email execution processes.	**Deliver one-to-one messages across inbound and outbound channels through a dynamic and centralised offer catalog.**	**Monitor and report on key customisable and actionable metrics such as budget and costs, delivery status, recipient activity and campaign ROI.**

There are three versions of Adobe Campaign, tailored to your digital marketing needs.

1.1.1.1 Adobe Campaign Standard: Email Marketing

Adobe Campaign Standard allows marketers to harness the right mix of data, content and delivery capabilities to drive more efficiency and effectiveness in *email* campaigns. This offering is the first email marketing solution to be natively integrated into Adobe Marketing Cloud. In addition to common email features, Adobe Campaign Standard adds a comprehensive, integrated customer profile along with the ability to automate multi-touch, multi-wave and triggered campaigns from one user interface. It features a new look and feel, streamlined asset management and audience sharing with Adobe Marketing Cloud. A new mobile- and tablet-friendly UI allows marketers to create and manage their email campaigns across mobile devices. With Adobe Campaign Standard, email marketing can truly become the contextual engine that powers your brand's customer engagement marketing program.

Key Benefits	Key Capabilities	Integrated with Adobe Marketing Cloud
•Better productivity and faster time to market. •Enhanced targeting and effectiveness. •Increased customer engagement.	•Built for email marketers. •Customer engagement engine. •Touch and mobile UI friendly.	•Adobe Marketing Cloud experience and user interface. •Email remarketing capabilities. •Contextual email marketing. •Email content management.

1.1.1.2 Adobe Campaign Premium: Cross-Channel Marketing

Adobe Campaign Premium helps you plan, automate, measure and optimise marketing communications across channels. This solution executes personalised marketing programs across online (email, Web, social, mobile), offline (kiosks, call centre, point of sale), traditional (direct mail) and emerging (in-car, in-game) channels. Making the most of each interaction, Adobe Campaign Premium also moves organisations beyond siloed channel marketing to orchestrated customer journeys. And marketers can scale and unify campaigns regardless of messaging needs or volume because Adobe Campaign Premium removes the cost-per-message stranglehold imposed by email service providers and offers a cost-effective pricing model that meets consumers' demands for less noise and more relevance.

Key Benefits	Key Capabilities	Add-Ons
• Embrace personalisation. • Unify the customer experience. • Deliver return on marketing investment.	• Integrated customer profile. • Personaliation and optimisation for marketing messages. • Cross-channel campaign management. • Campaign performance measurement. • Add-ons and other bundles.	• Multi Channel. • Survey Manager. • Marketing Analytics. • Campaign Optimisation. • Distributed Marketing.

1.1.1.3 Adobe Campaign Ultimate: Real-Time Marketing

Adobe Campaign Ultimate allows marketers to orchestrate bi-directional communications through each available channel – email, Web, SMS, direct mail, social media, mobile app, point of sale and call centre. Marketers can scale their campaigns regardless of message needs, because Adobe Campaign removes the cost-per-message constraint. Meaningful customer experiences are served by deep personalisation capabilities that make each message one-to-one relevant and contextual. With robust analytics embedded in the solution, marketers can also measure the return on investment of their marketing strategy right from their campaign management solution. Finally, thanks to the Adobe Campaign integration with Adobe Marketing Cloud, organisations can embrace every aspect of their marketing strategy in a consistent and seamless environment.

Key Benefits	Key Capabilities	Add-Ons
• Unify inbound and outbound marketing communications. • Engage in real time. • Analyse and optimise your marketing strategy.	• Integrated customer profile. • Cross-channel campaign management. • Real-time marketing. • Reporting and optimisation.	• Distributed Marketing.

1.2 About This Playbook

This document follows a structure that will help you understand the key focus areas to nurture the implementation of Adobe Campaign. This structure is based the Digital Governance Framework, which creates the appropriate business environment for digital to succeed. It includes:

- **Leadership** – Executive buy-in and support for implementation and adoption.
- **Strategy** – Clarity and alignment around key business goals for evaluating digital performance.
- **People** – Resources, expertise and the appropriate team structure to run an Adobe Campaign effectively.
- **Process** – Procedures, project management and workflows for deploying and using Adobe Campaign effectively.
- **Product** - Solution fit, common integration and automation.

What's different about digital? Everything.

Adobe Digital Governance Framework.

2 Leadership

Leadership is critical as it provides the foundation for a successful digital transformation.

C-suite involvement is needed to drive a digital transformation program, budget and outcome. Your role as the project sponsor is to contribute with a strong understanding of how Adobe Campaign – and digital in general – will transform the business. Position yourself as the subject matter expert and functional leader in a hands-on mode.

A common trait you will find in successful digital teams is they are owned and managed by people who are prepared to make the necessary investments in talent, equipment and training. Leaders are skilled at extracting optimal performance from team members and developing strategies that take full advantage of their unique talents. Leadership consists of four subcomponents: sponsorship, buy-in, communication and accountability.

2.1 Sponsorship

Having an effective executive sponsorship will help the project achieve maximum success. To be truly effective, this internal executive sponsor should have enough seniority and influence

within the business to command buy-in from other stakeholders across the organisation. Having a high level of self-interest in the project success, a passion for digital transformation and truly believing in how Adobe Campaign is going to transform the business are also critical.

An effective executive sponsor should guarantee the implementation of Adobe Campaign stays in line with the corporate strategy, protecting it from conflicting initiatives or internal politics and helping address any limiting factors, such as resource or budget constraints.

The Four P's of Execute Sponsorship

Source: Dykes, Brent. 2011. Web Analytics Action Hero. Adobe Press.

2.2 Buy-In

Achieving management buy-in across your leadership team is also key. Having multiple change agents to drive adoption will help you drive adoption easier and faster. The responsibility for the implementation and deployment of Adobe Campaign needs to be shared by the entire leadership team.

It is then the executive sponsor's responsibility to win over the executive team by sharing examples that prove the value of Adobe Campaign and digital marketing. Typically this focuses on delivering a better customer experience and subsequent benefits to the business.

When implementing digital projects such as Adobe Campaign leaders will be responsible for monitoring departments and teams owning different parts of digital marketing initiatives. It is critical then to make sure that all groups share a strategy to achieve common goals. Having an internal roadshow to win support from executives will help raise awareness towards aligning all teams and obtaining the necessary resources for an optimal implementation.

2.3 Communication

To get the organisation on board, it is always a good idea to share the vision and repeatedly reinforce the reason why your company is investing in Adobe Campaign technology by articulating both the customer benefits and business benefits. Sharing documentation such as successful case studies of digital implementations will help you validate why and how this investment will take the organisation to a new level. If you want the organisation to embrace digital transformation, it is important to let employees know it is a priority.

2.3.1 Communication Management

A communication strategy can lay out the foundation and framework for communicating initiatives and objectives across business and technology teams. It can also help by:

- Providing guidance and a framework for effective communication within, and outside of, the project.
- Ensuring that proper protocols are always followed when preparing and delivering communication.
- Providing precise and concise project communication at the right time.
- Involving all necessary stakeholders and maintaining regular contact to keep up transparency in all transactions.
- Having clear communication channels with well-defined roles and responsibilities.
- Clarifying doubts, overcoming challenges and averting risks that affect the project.
- Building trust and developing open relationships between the parties.
- Promoting openness and transparency.

2.3.2 Recommended Communications Process And Principles

You can build your communication strategy around the following key principles:

- Communication is critical to effect change: Ongoing and timely communication is a fundamental requirement to inform and respond to stakeholders about the change, its impact on them and its outcomes; to enable feedback; to manage expectations; to ensure a smooth change transition; and to support uptake and continual improvement.

- Communication delivery is local: Communication from the local area will mean that messages are relayed in a language that is relevant to the audience. Engagement with local communicators across business and technology will increase the effectiveness of the communication.

- Communication is consistent and repetitive: With a common approach across the program stakeholders will come to expect communication through specific methods

(channels) with given formats (look) and timing. Repeating key messages through multiple channels will increase the amount of information that is absorbed.

- Communication is linked to the project objectives: By linking the communication to the objectives it provides a context and reasoning behind change. Repeatedly providing these links will serve as reminders as to the wider benefits of the project.

2.3.3 Setting Communication Goals

All communication developed and distributed throughout the project is intended to achieve the following goals:

- Stakeholders and program or project team members are aware and informed:
    - Stakeholders and program or project team members should receive timely information about what is happening (e.g. why, when and how, and what it means to them). This information starts at a generic level (which is repeated throughout the program or project lifecycle) and becomes more detailed, specific and targeted to the audience and as the program/project progresses. This information enables stakeholders to think about, understand and be prepared for change and plan for future program or project streams of work.

- Stakeholders and program or project team members are engaged:
    - Opportunities are created and communicated to key stakeholders to support them in exploring and becoming involved in and committing to a new way of doing things, for example:
        - Different stakeholders and team members will move through and transition at different rates and times.
        - Communication will aim to gain key stakeholders and team members' commitment through implementation(s).
        - Strategies and implementation roadmaps can be developed to manage stakeholders and team members who are resistant to the change throughout the transition(s).
    - Communication is two-way, with stakeholder input and feedback sought and valued at all stages.
    - Stakeholder and team member expectations are managed:
        - The aim of communication is to provide set expectations of strategic initiatives, program or project scope, associated constraints, risks and dependencies to explain why this may differ from expectations (in

targeted messages) and to provide ongoing updates on expected, and actual, outcomes.

- Support the acquisition of skills and knowledge: Training is backed up by supporting communication to reinforce it and provide opportunities to share knowledge.

2.3.4 Recommendations On A Communication Approach

An approach to communication management for the program or project may include:

- Communications analysis:
  - Conduct an effective stakeholder analysis:
    - Stakeholder analysis is developed at the project board, user group, project team and stakeholder levels.
    - The stakeholder analysis will focus on all parties (e.g. users, management, executives or third parties) required to achieve the desired outcomes and any parties impacted by the change to ensure full coverage.
  - Categorise stakeholders into specific audiences (communication channels).
  - Identify information requirements of all parties; ensure communication channels are in place; track required message delivery; and establish distribution lists by subject area:
    - Have regular meetings. There should be regular meetings organised with various levels within the project to ensure that there is regular communication.
    - Where program or project team meetings do not meet communication requirements (for example, where cross-area representation is required for specific project deliverables):
      - One-on-one meetings may be required to obtain specific input or deliver important messages (as required), both formal and informal.
      - Project share drive to maintain the main reference point for overview of the program or project with links to documentation for wide dissemination and feedback.
    - A common wiki or alternate online knowledge management solution to provide access to all parties and to provide a workspace.

- Project electronic newsletter or company-wide communications to provide regular program or project news (updates; upcoming events; outcomes) delivered by email.
- Email may be used for targeted, individual or group communication – with a specific purpose.
- Information distribution and reporting; standard templates for communicating regular information such as project status reports; meeting minutes; and other reports will be used to ensure communication is consistent and repeatable.

2.4 Accountability

Your organisation is investing in Adobe Campaign and top executives will expect results. For this to happen, it is the leader's and senior stakeholders' jobs to hold themselves and their people accountable, including employees, teams, partners and most importantly themselves. Start with changing the perception that accountability is about punishment and discipline. It should really be about learning and improvement.

To define accountability, you can create a project charter (PC). This document states that a project exists, why it is important, who is involved, its timeframes, the expected outcomes and the resources needed for it to be successful. It also gives you written authority to begin work.

2.4.1 Steering Committee

Setting up a group of high-level stakeholders and experts will help you achieve the four subcomponents of leadership and at the same time set direction to the project. This steering committee can also help by:

- Prioritising initiatives.
- Reviewing business cases for new initiatives.
- Lobbying for the necessary time, personnel and budget.
- Ensuring quality in decision making.
- Encouraging a collaborative work environment.
- Monitoring progress towards goals.
- Controlling scope and resolving conflicts.

2.4.2 Common Roles And Responsibilities Within A Steering Committee

The following high-level roles and responsibilities are based on industry standard practices for a steering committee.

Role(s)	Responsibility
Business or technology sponsor	The sponsor is ultimately accountable for the outcome of the program or project and is responsible for securing spending authority and resources. **Responsibilities** • Vocal and visible champion. • Legitimises and lends credibility to the strategic goals and objectives. • Is the escalation point for changes and issues outside the agreed tolerances? • Assists with stakeholder engagement where required.
Business executives	The executive's role is to ensure that the program or project is focused on achieving its objectives and delivering products that will achieve the forecast benefits, gives value for money, ensures a cost-conscious approach and balances the demands of the business. **Responsibilities** • Design and appoint the program or project management teams. • Oversee the development of the business case, ensuring corporate strategic alignment. • Monitor and control the progress at a strategic level, in particular reviewing the business case regularly. • Escalate issues and risks. • An escalation point for issues and risks to ensure any risks associated with the business case are identified, assessed and controlled. • Make decisions on escalated issues, with particular focus on continued business justification. • Ensure overall business assurance of – and ensure that it remains on target to deliver – products that will achieve the expected business benefits.
Business owner	This role represents the interests of all those who will use the products (including operations and maintenance), those for whom the products will achieve an objective, or those who will use the products to deliver the benefits and value drivers. **Responsibilities** • Provide the quality expectations and define acceptance criteria. • Ensure that the desired outcome is specified. • Ensure that end products will deliver the desired outcomes and meet user requirements. • Ensure that the expected benefits are realised. • Provide a statement of actual versus forecast benefits at benefits reviews. • Resolve user requirements and conflicts.

Technical owner	This role represents the interests of those designing, developing, facilitating, procuring and implementing the products. This role is accountable for the quality of products delivered by suppliers and is responsible for the technical integrity of the program or project. **Responsibilities** • Assess and confirm the viability of the approach. • Ensure that proposals for designing and developing the products are realistic. • Advise on the selection of design, development and acceptance methods. • Ensure quality procedures are used correctly, so that products adhere to requirements.
Assurance owner	Assurance covers the primary stakeholder interests of the business, technical, end-users and suppliers. **Responsibilities** • The right people are planned to be involved in quality inspection at the correct points in the products' development. • Staff are properly trained in the quality methods. • The quality methods are being correctly followed. • Quality control follow-up actions are dealt with correctly. • An acceptable solution is being developed. • The scope of the program or project is not changing unnoticed. • Internal and external communications are working. • Applicable standards are being used. • The needs of specialist interests (for example, security) are being observed. **Business assurance responsibilities** • Assist developing the business case and benefits review plan. • Review the business case for compliance with corporate standards. • Verify the business case against external events. • Check that the business case is being adhered to throughout the program or project. • Check that the program or project remains aligned to the corporate strategy and continues to provide value for money. **User assurance responsibilities** • Ensure that the specification of the user's needs is accurate, complete and unambiguous. • Assess whether the solution will meet the user's needs and is progressing towards that target. • Advise on the impact of potential changes from the user's point of view. • Ensure the quality activities relating to products at all stages has appropriate user representation. • Ensure quality control procedures are used correctly to ensure that products meet user requirements.

	Supplier assurance responsibilities • Review the product descriptions (features and capabilities) and align these to delivery. • Advise on the selection of the development strategy, design and methods. • Ensure that any supplier and operating standards defined for the program or project are met and used to good effect. • Advise on potential changes and their impact on the correctness, completeness and integrity of products against their product description from a supplier perspective. • Assess whether quality control procedures are used correctly so that products adhere to requirements.

Program or project manager	The program or project manager has the authority to run the day-to-day operations with the prime responsibility of ensuring the end result produces the required outcome within the specified tolerances of time, cost, quality, scope, risk and benefits.
	
	Responsibilities
	• Effective project management requires the project management team, as a whole, to possess and apply knowledge in several areas:
	  ○ Project management itself.
	  ○ Business and industry domain knowledge specific to the project.
	  ○ Technology knowledge required by the project.
	  ○ Interpersonal and communication skills.
	• The project management framework consists of five key activity groups: Initiation, planning, execution, monitoring and control, and closing.
	  ○ These are the processes or activities for managing the project and they are different from the project lifecycle.
	  ○ The project life cycle activities are generally sequential while project management activities are performed (as below) because project management activities may overlap and repeat along the timeline depending on risks (for example, the controlling activities may lead back to planning to revise the project plan as a result of changes).

2.4.3 Setting Up A Working Group

Having a working group (with subject matter experts) working below a steering committee will help achieve specified goals. In your Adobe Campaign implementation, this working group consists of the practitioner leads executing the project. They would meet regularly and report upwards to the steering group.

The working group should have a weekly discussion where issues and risks are addressed and the status, progress and approach of the project are discussed.

3 Strategy

"74% of business executives say their company has a business strategy. Only 15% believe that their company has the skills and capabilities to execute on that strategy."

- *Forrester: Accelerating your digital business, 2013*

3.1 Adobe Campaign Maturity Model

Your organisation may have gained experience in cross-channel campaign management, designing, executing and measuring marketing communications that span digital and traditional channels. To measure the competency levels of your organisation, Adobe has developed a maturity model that outlines key campaign management dimensions and includes best practices across the dimensions based on the experience of Adobe campaign management experts and consultants, conversations with Adobe customers and insights from industry analyst research on cross-channel campaign management. This tool enables organisation to:

- Assess existing marketing technology and organisational effectiveness.
- Identify strengths and weaknesses associated to key marketing campaign competencies.
- Benchmark your organisation against key industries, including media and entertainment, financial services, travel and leisure, retail and others.
- Set future goals and areas for improvement.
- Provide specific recommendations to marketers based on the results.

3.1.1 Key Dimensions Of Campaign Management

Adobe Campaign Maturity Model

DIMENSION	MATURITY LEVEL			
Customer knowledge and data	- Have customer database. - Basic customer profiling for marketing tactics.	- Ability to access demographic information. -Ability to engage with customers actively.	- Ability to access demographics, transactional data. - There are processes to conduct data cleansing. - There are tactics in place to improve consumer engagement.	- Actionable database. - Consolidate information from multiple sources. - Easily access demographics, transactional data, marketing history and behavioural data in real time. - There are processes in place to optimise data quality and enhancement. - Ability to continuously profile customers and enhance engagement.
Channels and execution	-Deliver messages and get results in different advertising channels.	-Engage with customers in several outbound channels. -Execute personalised experiences across channels in a decentralised manner.	-Engage with customers in both inbound and outbound channels. - A high level of platform centralisation.	-Efficiently engage with customers in outbound channels such as: email, direct mail, SMS, mobile app push, social media and others. - Ability to generate touch points in

				inbound channels like social, call centres, point of sale, ATM/kiosk and others. -Ability to execute marketing and advertising campaigns across multiple channels using a centralised platform.
Automation and orchestration	-Create automated responses to customer actions in a Web site.	-Ability to start conversations based on customer actions in the Web site and social media channels. -Capable of reporting on performance and create insights for improvement.	-Ability to start conversations based on customer actions in the Web site and social media channels. -Monitor channels, budgets, schedule tasks and provide alerts to cross-functional teams involved in campaign management. -Capable of reporting on performance and create insights for improvement.	Engage in automated follow-up and trigger relevant messages to contacts in multiple stages of their consumer lifecycle. -Automatically curate and generate new segments based on the performance of actions and behaviours originating from the marketing Campaigns. -Easily orchestrate multi-wave campaigns by designing content, targeted segments, cross-channel workflows and personalised landing pages.
Campaign optimisation	-Campaigns are refined periodically when required.	-There are processes in place to refine and improve campaign creative and deliverables. - Basic success metrics are in place to understand campaign performance. -Run A/B testing to improve campaign performance.	-There are processes in place to refine and improve campaign creative, performance and deliverables. -Ability to constantly monitor, manage and improve marketing campaigns.	-There are business rules to allow personalised offers and content to be delivered to specific customers. -Run A/B testing to improve campaign performance. -Run 'what if' simulation analysis based on target segments, content and rules. - Processes in

				place to refine and improve campaign creative and deliverables. -Fatigue rules in place to reach audiences in more effective ways.
Real-time engagement	-Does not execute campaigns in real time.	-Does not execute campaigns in real time.	-Ability to trigger campaigns in real time. -Own a centralised repository of offers and content that can be delivered in real-time across inbound and outbound channels. -Deliver personalised and contextual offers to contacts based on their individual profile data.	-Ability trigger campaigns in real-time. -Own a centralised repository of offers and content that can be delivered in real-time across inbound and outbound channels -Deliver personalised and contextual offers to contacts based on their individual profile data. Leverage self-learning technologies to automatically re-decision offers and content based on real-time feedback.
Reporting and analytics	-Generate basic reports to understand key success metrics.	- Understanding of data mining to generate reports when needed. -Ability to build and share reports and combine different fields to create success metrics.	-Manage any data in databases to create reports in real time without requiring a data expert. - Build reports and combine different fields to create the measures that matter for the business. -Easily share reports, click segments and kick-off marketing campaigns based on previous results. -Automatically forecast results of campaigns and	-Manage any data in databases to create reports in real time without requiring a data expert. - Build reports and combine different fields to create the measures that matter for the business. -Use and import predictive models to help with reporting and targeting strategies. -Easily share reports, click segments and kick-off marketing

			offers, including revenue forecasting.	campaigns based on the results. -Automatically forecast results of campaigns and offers, including revenue forecasting.
Organisational strategy	-Marketing campaigns are only product or service centric, pushing messages and reacting to market opportunities. -IT support is a constraint in the organisation. - Marketing campaigns are mostly seen as cost centres rather than investments.	-Marketing campaigns are mostly product or service centric, pushing messages and reacting to market opportunities. -IT support is a constraint in the organisation. -Budgetary understanding is non-existent. Marketing campaigns are typically seen as cost centres rather than investments.	-Engagement strategy can be generally described as customer-centric (i.e. listening and reacting), not product centric (i.e. pushing messages and reacting). -IT support is existent, but works separately as an individual business unit. -Have a clear understanding of the P&L impact from marketing campaigns. -Have a defined strategy for communicating and interacting with customers across channels and devices over time.	-Have a clear understanding of the P&L impact from marketing campaigns. -Own a separate IT budget within marketing for engagement strategies. -Have a defined strategy for communicating and interacting with customers across channels and devices over time. -Engagement strategy can be generally described as customer-centric (i.e. listening and reacting), not product-centric (i.e. pushing messages and reacting).

The Campaign Maturity Model comprises best practices for cross-channel campaign management within seven key dimensions:

Customer knowledge and data

Refers to how organisations access and leverage various data sources to personalise customer experiences. Data is essential to the success of a campaign management strategy. Tactics considered include maintaining an actionable marketing database; consolidating multiple databases; having easy access to demographics and behavioural data; cleansing data; and progressively building customer profiles over the entire customer lifecycle.

Tip & Trick

Check the self-assessment tool to assess your organisation's cross-channel campaign management maturity.

Channels and execution

Execution refers to the way organisations take action to send messages across any number of digital and traditional channels. Each customer is unique, so personalised communication across the most efficient channels should be considered to optimise success.

Automation and orchestration

Automation describes the level of marketing interaction required to use the technology and orchestration is the ability for marketers to manage and connect all of the pieces of their campaigns, data and channels. Automation and orchestration determine the best way to convert prospects into customers by delivering the right message at the right time.

Campaign optimisation

This is defined by the processes undertaken to perform high-level campaign simulations optimising results and providing customers the best content.

Real-time engagement

Brands that are able to seamlessly deliver customer experiences immediately at the point of contact and continuously across inbound and outbound channels will be positioned to win.

Reporting and analytics

Reporting and analytics are crucial to the success of a marketing campaign and to inform future activities. Not only is it important to monitor campaign performance, but it is also vital to monitor data in real time and take action based on it.

Organisational strategy

How an organisation communicates with its customers is critical: Is it talking at them or facilitating a two-way conversation? Someone within the organisation must own this customer engagement strategy. A holistic strategy includes having dedicated roles that are responsible for campaign management tactics, technology budgets and a customer engagement process that spans channels and touch points.

3.2 Digital Strategy

One of the biggest challenges organisations face is being able to define what they are trying to achieve through digital channels. In many cases, corporate Web sites aren't owned by a single entity leading to a mix of different, or even worse, competing interests and purposes. This causes a mixture of counterproductive results.

A clear digital strategy enables your digital team to align its activities to the key priorities of your business and succeed as an integral part of your organisation. A key point to consider is that your digital strategy should always be aligned to the overall business goals of the organisation. One of the common challenges we see at the start of an Adobe Campaign implementation is indecision on which data from the myriad of online and offline data sources customers have to

integrate into Adobe Campaign. Having a clearly defined digital strategy will then inform your marketing campaign activity, the audiences you need to target for those campaigns and the data required to build those audience profiles. If you have clarity on each of the above, you will have a very sound idea of what data is required first and foremost to inform your next six to 12 months of marketing activity and what should be integrated first rather than trying to integrate everything at once and delaying the immediate benefits you can start to achieve through a prioritised integration plan aligned to your business needs.

A Suggested Digital Strategy Framework

These are steps you can follow to craft your digital strategy:

- Identify all of the key stakeholder groups that have input into your company's digital approach.
- Gather key business objectives from each group separately.

- Merge the goals into a set of four to five key objectives.
- Based on your understanding of the corporate strategy, prioritise and rank the list of goals.
- In a group meeting, review and refine the goals with key stakeholders. If needed, involve a neutral third party to mediate potential disagreements.
- Based on stakeholder feedback, finalise the business objectives and define KPIs to measure these by.
- Share an overview of the agreed digital strategy with key stakeholders.

Key terminology

3.2.1 Enterprise Key Business Goals

- Strategic business goals and objectives.
- Aligned across the business at an enterprise level.
- Tied to increased revenue (or decreased costs).
- Can include a medium- to long-term vision of the company.

Examples: Increase revenue (by 5%), expand product line (new line of business) and improve customer satisfaction (by 5%).

3.2.2 Digital Goals

- Strategic business goals and objectives for your digital channel.
- Identify how the digital channel will contribute to achieving the enterprise goals.
- There can be more than one digital goal for each enterprise goal.

Examples: Increase online sales (by 5%), increase online audience (by 10%) and increase online customer satisfaction (by 5%).

3.2.3 Initiatives

- Strategic digital goals.
- Actionable projects.
- Relate to the digital channel as a whole.

Examples: Create mobile content, increase new visitors and create content partnerships with specialised bloggers.

3.2.4 Tactics

- Specific actionable online business requirements.
- Gaps in achieving online initiatives and goals.
- Achievable end goals.

Examples: Measure cross-channel conversion rates, measure email delivery and engagement, measure application form abandonment and report mobile usage.

3.2.5 Key Performance Indicator

A key metric to evaluate business success of digital activities.

Example (business objectives and metrics)

Business objective	Metric
1. $500M in sales through digital channels	Revenue
2. Increase brand awareness	Visitors
3. Drive deeper and more enduring customer relationships	Logins

3.2.6 Aligning Your Digital Strategy To Your Data Integration Needs For Adobe Campaign

Map you enterprise goals through to your campaign activity for the next six to 12 months and the data you need to integrate to help prioritise your data integration needs.

Example:

Enterprise Goal	Digital Goal	Initiative	Tactics	Audience Segments	Data Sources
Increase product penetration per customer: $50M	Increase product penetration per customer: $30M	Rewards campaign	Analysis of channel preferences by the top 10% of customers	Carefree optimists and big spenders	CRM: Customer segment CRM: Preferred channel POS: Number of purchases in last 12 months POS: Average spend across offline channel Digital: Average spend across digital channels

Digital Strategy Framework

3.3 Focus

Focus means understanding and focusing on the organisation's key business goals and strategic initiatives to achieve objectives. It is also important to prioritise these goals as well as their scope and timing for completion. As business competitive environments change it's also important to review your business strategy and goals on a quarterly or bi-annual basis to ensure they remain relevant to the current environment.

Tip & Trick

When creating your KPIs remember the acronym S.M.A.R.T. Performance indicators must be:

Specific: to precisely define the goal and it's expected outcome.

Measurable: to be able to understand what success means.

Assignable: to individuals or teams

Realistic: yet challenging to drive great results.

Time-based: built to drive results fast, yet realistic.

3.3.1 KPI Strategy

Focus also includes defining the key performance indicators (KPIs). In digital, these indicators can be metrics such as online revenue or applications along with associated targets for those metrics, for example, increase application adoption rate by 30 per cent.

A common mistake when setting KPIs is selecting random metrics from an industry-related list and expecting they will fit and perform towards achieving your unique business goals. Make sure you always start with understanding your business goals before selecting appropriate KPIs. As you deploy your digital properties using Adobe Campaign you will be able to use these KPIs to understand the impact changes in content, design and architecture have had on your business.

What Are Key Performance Indicators?

What they are:

- Quantifiable, measurable and actionable.
- Measure factors that are critical to the success of the organisation.
- Tied to business goals and targets.
- Limited to five to eight key metrics.

What they are not:

- Metrics that are vague or unclear.
- "Nice-to-knows" or metrics that are not actionable.
- Reports (e.g., top search engines, top keywords).
- Exhaustive set of metrics.
- Refutable.

When implementing Adobe Campaign, ensure that your KPIs are measured. Don't waste time on non-strategic measures. Ask yourself this: If your CEO was stuck on an island and you could tell him only three things about your business so he would know the business was healthy, what would you tell him? If you said the average time spent on a Web page was one minute and 30 seconds that tells him nothing.

If you tell him your campaign generated two million visits to the Web site and the average revenue generated from a specific channel was $2 that is something he will understand as a true measure of business success. There is so much opportunity to measure initiatives and improve on them based on four or five metrics that can keep you busy for months and even years. Don't fret about measuring every little last detail, you'll drive yourself crazy and you won't be supporting your business goals.

"Companies with greater digital capabilities were able to convert sales at a rate 2.5 times greater than companies at the lower level did."

- *McKinsey & Co. March 2015*

3.4 Alignment

Organisations are dynamic. Business strategy changes, leadership changes, Web sites and general communications are redesigned, the market landscape changes, services and new products are introduced, marketing campaigns are launched, new channels appear and new competitors appear. All these changes make it hard for leaders to ensure alignment between the company's current strategy and the implementation of digital solutions.

To make sure there is a proper alignment between your Adobe Campaign implementation and your digital strategy, your measurement strategy needs to be dynamic and adjust as changes occur within your business. Having a member from the digital team sitting in the steering committee can ensure that the team knows what is happening within the business and any possible changes in priorities. The following are key factors that need to be considered:

3.4.1 Data Modelling

Data modelling is the method by which organisations analyse, define and align the data flow requirements needed to support key business processes. Aligning your data structure with Adobe Campaign is key to getting the most value from the solution as it provides marketing and technical users with the means necessary to respond effectively to your organisational targeting and personalisation requirements. This ultimately strengthens the way your clients experience your marketing communications.

The consulting team conducts a "data model" workshop to support your organisation with the alignment of your data structure. In this workshop, which typically is conducted for one day, you will be able to understand your organisation's data needs as well as the architecture of an efficient data model. Although the process may vary, the team usually undertakes your data management strategy in three phases:

3.4.2 Building The Consumer Journey

A "consumer journey" is the process, or set of processes, consumers undertake from the moment they become aware of a need to fulfil throughout a buying education and decision process, until the transaction and post-purchase experience. These are relevant moments or touch points your organisation must leverage to persuade consumers to act positively towards your communication.

Tip & Trick

This framework may be used in conjunction with the campaign creation recommended workflow.

The graphic above illustrates a basic framework to identify and allocate content opportunities through the consumer journey:

1. **Consumer profiling:** Establish a list of segmented audiences relevant to your organisation describing clearly their main demographic, socio-cultural or behavioural characteristics. This exercise is interesting as it provides organisations with a reliable overview of the different types of clients and what their interests are. Feel free to be as granular as desired, however, ensure the attributes are feasible enough to be translated into data fields and are measurable to facilitate the traceability in Adobe Campaign. The following is an example for the real estate Industry in Australia:
2.

Consumer Segment	**Demographic**	**Budget**	**Key Traits and Interests**
Luxury family property owners	Age : 40+ Profession: Finance Marketing Legal	$1,200,000+	- Time poor - Tech savvy - Digital orientation - Interacts on social media for networking purposes - Looking for a property, either for investment or primary residence

Self-managed super fund clients	Age : 65+ Profession: Retired	$600,000+	Manages a super fund Looking for an investment opportunity Spends most of the time with family Looking forward to the next big holiday

3. **Allocate content:** Once the segments have been identified, brainstorm all the content possibilities (do not disregard ambitious or unconventional ideas) to reach consumers and provide them with an enriching experience across the consumer journey. Make sure you specify the creative description (what the idea is and how it will serve a business objective), the format (video, text, audio or tangible), the channels the content will be delivered on and how it will be produced.

3.4.3 Content Publishing Strategy

Content strategy is the planning behind the creation, delivery and maintenance of all that content that supports primary business objectives and meets consumers' needs across multiple (and integrated) channels. It is an iterative process that is focused on taking advantage of the assets you have on hand. The following is a framework for setting the content creation process in your organisation:

3.4.3.1 Analyse

It is key to align your business objectives with a thorough understanding of your audience's preferences, behaviours and needs. You can build segmentation profiles to gain knowledge of what the critical touch points are and what content or activities will drive better results for your organisation. You can achieve so much by leveraging data from other tools such as Adobe Campaign (for consumer analytics and data) or Adobe Target (for further personalisation). It is important to set creation and delivery processes, and budgets, right at the start of your project to drive and motivate stakeholders to contribute to your marketing initiatives.

3.4.3.2 Collect

Plan for a cohesive execution of your content strategy. Encourage active participation and production of content to transform the marketing culture of your organisation. It is recommended to create and share an editorial calendar that includes authors, channels and technical specifications.

3.4.3.3 Manage

Ensure the plan is working adequately for your organisation and that all stakeholders are doing their part. This phase is when you put your governance processes to test.

3.4.3.4 Publish

Monitor that your organisation's content strategy has reached the market and fulfils your organisation's goals. Invite stakeholders to periodic meetings and embrace feedback to improve content and identify appealing opportunities.

3.4.4 Marketing Resource Management

Marketing resource management (MRM) is defined as a set of processes and capabilities that aim to enhance an organisation's ability to orchestrate and optimise the use of internal and external marketing resources. MRM involves the adoption of processes and technologies to transform and enable an organisation's ability to plan, budget, execute and measure the impact of enterprise-wide marketing efforts.

When taking full advantage of Adobe's technology, your organisation will have a holistic view of all internal and external marketing processes required to achieve success. This means that you and your organisation will have real-time access to: Financial information; process management workflows to approve, automate and execute marketing tactics; and an integrated digital assets management system to store and use multimedia and provide the means for multisciplinary organisations to work cooperatively.

3.5 Innovation

Once your organisation is consistently delivering relevant marketing messages across multiple channels, you will be ready to continue gaining competitive advantage by finding the means to expand the possibilities and generate greater value to your stakeholders. Gather a team of visionary innovators and use the data collected from your ongoing campaigns and digital tactics and empower them to generate new creative ways to improve your consumer's lifecycle.

4 People

4.1 Expertise

Expertise refers to the different skills required by your organisation's digital and technical staff, business users and senior executives. Not every group will need the same skills, but an overall understanding of how a digital strategy and Adobe Campaign will help the organisation is fundamental.

Investing in training is a key activity when implementing new technologies. Make sure you have training programs not only for on-boarding new staff, but also for current employees so they can continue growing their expertise over time.

Adobe offers a wide range of courses that can help you with your Adobe Campaign implementation. These courses are available in multiple formats and are located to suit your needs – at an Adobe regional training centre, online as virtual learning or on-site at your company.

To see all Adobe Campaign courses go to the Adobe Campaign Course Catalog.

4.2 Structure

A well designed organisational structure will give you and your staff clear guidelines about how the organisation is put together, who they have to report and delegate to and how information flows across different levels. Defining an organisational structure – including roles and responsibilities – before starting with your Adobe Campaign implementation will also ensure the project runs efficiently.

4.2.1 Structures Types

Dispersed This structure is typically an early stage organic and reactive response to initial staffing and resourcing requirements arising in local or specific departments. While this works well initially, it has limited strategic scalability and can prove problematic in coordinating a top-down strategic vision for the long-term structure and direction of digital capability, particularly within a large and diverse organisation.	

Centralised Digital marketing roles and capabilities are centralised into a single area or team. This is typically characterised by a reporting structure through to one head of digital, e-business, or e-commerce.	
Hub and Spoke A combination of both, typically whereby digital marketing expertise is split, some positioned at the centre looking across the whole organisation, and some sat within divisions or departments, often acting as a connection point between the Centre of Excellence and local non-digital teams.	
Dandelion Organisations have a hub-and-spoke approach but across multiple units or divisions. Usually larger corporations that are operationally divided around key audiences (B2B and B2C for example) that might centralise some key digital capability across the entire corporation, but also could have some hub-and-spoke arrangements in each of the key divisions.	
Honeycomb One additional structure is the holistic, or "honeycomb" structure, where each employee is empowered with capability. This structure might be interpreted as the equivalent of a fully integrated digital capability where digital expertise and skills are the domain of a broad range of people and roles throughout the organisation. In this scenario no specialist digital roles exist, and no single role has digital capability as its sole remit.	

4.2.2 Project-Based Recommended Organisational Structure

4.2.3 Business Recommended Organisational Structure

Organisations commonly use a centralised model for digital implementations. In this structure, all of the digital resources are centralised into a single area or team often with a reporting structure through to one head of digital, e-business, or e-commerce. This is a generic example of an organisational structure and hiring recommendation:

The main advantages of having a centralised model are:

- **Consistency and control:** Consistent methods, procedures and terminology.
- **Governance and focus:** A unified commercial entity, strategy and budget; ease of securing senior management buy-in to digital marketing strategies and projects; consistent standards; greater efficiency in the allocation of resources; and ease of project prioritisation across the organisation.
- **Scalability and support:** The application of digital expertise to support the wider business; and clarity on where to go for support and advice.

4.2.4 Roles And Responsibilities

4.2.4.1 In A Centralised Model

Here are the suggested roles and responsibilities for each of the roles described above.

Director of digital

- Director of digital analytics, marketing analysis, CRM, or business intelligence.
- Position of authority to influence others.
- Key point of contact for executives, business owners and analysts.
- Focuses on corporate-level issues, but maintains visibility into regional or business-unit issues.
- Works closely with executive sponsors to drive value from analytics across the organisation.
- Drives cultural change and product adoption within the organisation via user education and other interactions.
- Manages a core team and commercial relationship with analytics vendors.

Head of strategy

- Drives and owns the digital strategy roadmap.
- Coordinates ongoing strategy workshops with stakeholders.
- Ensures the business is continually focused and aligned with business objectives.
- Determines the priority of new implementation projects.
- Drives the digital steering committee, not just a “Web analytics” steering committee.
- Manages the business analysis and project management resources.

Head of optimisation

- Owns the testing roadmap.
- Drives the personalisation and targeting strategies.

- Works collaboratively with the senior analytics team to support analytics optimisation through testing.
- Manages the testing resources.
- Manages the ongoing relationship with testing product vendors.
- Coordinates with the head of implementation on testing implementation needs.

Head of analytics

- Focused on overall digital performance with Web analytics being the barometer of that performance.
- Runs regular, recurring meetings (weekly or monthly) with stakeholders on digital channel performance.
- Establishes enterprise-wide standards.
- Manages ongoing relationships with analytics vendors.

Head of implementation

- Owns the analytics solution design architecture.
- Key point of contact for technical aspects of Web analytics for one or more business units.
- Works collaboratively with the core team on enhancements.
- Manages the implementation resources.
- Manages ongoing relationships with internal integration teams.

Business requirements specialist

- Defines prioritised projects.
- Runs workshops to gather business analytics implementation reporting requirements.
- Develops the business requirements documentation for each project.
- Gathers business sign-off.
- Works collaboratively with the core team on requirements gathering and enhancement and documenting processes.
- Acts as project manager.

Targeting lead

- Drives the testing roadmap.
- Owns the key (and complex) testing campaign initiatives.
- Key point of contact for testing technical aspects.
- Owns the testing, deployment and QA process and manages ongoing data accuracy checks.
- Mentors the testing specialists.

Digital analyst lead

- Focused on measuring the business unit's key performance indicators (KPIs) and optimising business unit online activities.
- Owns the analytical reporting requests log.
- Single point of contact for end-users within business units and understands end-users' changing needs.
- Validates data collection for a business unit.
- Meets with business unit reporting owners and core team members on a regular basis (monthly).
- Informs the core team of business unit activity and champions its needs to the core team.
- Coordinates QA efforts and manages ongoing data accuracy checks.

Digital implementation lead

- Drives the testing roadmap.
- Owns the key (and complex) implementing initiatives.
- Key point of contact for technical aspects.
- Owns the testing, deployment and QA process.
- Mentors the implementation resources.
- Maintains the library of implementation documentation and shares knowledge within the organisation.
- Active, not passive, participant in the deployment enhancement process.

Content strategist

- Drives the content strategy.
- Owns the content delivery roadmap.
- Manages the content delivery team.

Technical requirements specialist

- Defines prioritised projects.
- Runs workshops to gather technical requirements and identify risks.
- Develops the technical documents and deployment plan for each project.
- Gathers sign-off.
- Works collaboratively with the core team on requirements gathering and enhancement and documenting the process.

Targeting specialist

- Owns the testing and targeting campaign initiatives.
- Gathers the individual campaign objectives and requirements.

- Coordinates implementation campaign needs with the targeting lead.
- Key point of contact for individual campaigns.
- Delivers the individual campaign reporting and analytical insight.

Digital analyst specialist

- Gathers analysis requirements from the business.
- Delivers reporting requirements analysis, insight and actions.
- Presents analysis back to the report owner.

Digital implementation specialist

- Drives individual implementation projects.
- Coordinates with internal and external development resources on implementation requirements.
- Creates the individual project technical specification documents.
- Provides assistance with deployment and testing.
- May be assigned to a specific business unit.

Content producer

- Maintain communication among cross-functional teams.
- Own the process for creating, enforcing and managing the content production plan.
- Collaborate with all departments to define and manage goals, scope, specific deliverables and scheduling needs.
- Aggregate and distil input from all areas of the organisation and develop the best approach for incorporating feedback into project execution.
- Contribute to strategic thinking around content models that adapt, scale and expand over time and distribution platforms.

Project manager

- Outsourced initially and then established as a full-time equivalent (FTE) employee.
- Responsible for costing, estimating and planning projects.
- Preparing the project initiation documentation (PID).
- Responsible for ensuring best value is obtained for the project, including the supplier base and use of internal and external resources.
- Maintaining and completing project KPIs.
- Writing detailed and summarised project progress reports.
- Identifying, costing and processing any contract variations.
- Tracking activities against the detailed project plans.

Creative and UX designer

- Conceptualise and create design content for all campaign testing and targeting experiences.
- Test concepts, perform task and user analysis, and assist with user acceptance testing.
- Develop prototypes that succinctly illustrate hierarchy and navigation.
- Strategise and drive interactive product development, from site map to launch.
- Create compelling online consumer experiences that drive business results.
- Possess knowledge of prototyping and wireframe creation tools.

Channel analyst

- Specialise in a particular channel: SEO, SEM, display, social, affiliate, etc.
- Understand online strategy and how this breaks down into multi-channel Web marketing elements.
- Expert knowledge of key analytics tools and the ability to set up advanced tracking and reporting mechanisms and capture key metrics.
- Monitor and analyse Web related data “across the board” and analyses key metrics.
- Understand how different elements of Web strategy relate to, and complement, each other (e.g. organic SEO, social media PPC) and create metrics to monitor and measure this.
- Real-time, daily and weekly campaign performance reporting.
- Presentation of key data and conclusions to management.

Mobile implementation analyst

- Drives individual implementation projects around mobile.
- Coordinates with internal and external development resources on implementation requirements.
- Creates the individual project tech specification documents.
- Provides assistance on deployment and testing.
- May be assigned to a specific business unit.

Mobile content specialist

- Maintain communication among cross-functional teams.
- Own the process for creating, enforcing and managing the content production plan for mobile.
- Collaborate with all departments to define and manage goals, scope, specific deliverables and scheduling needs.
- Aggregate and distil input from all areas of the organisation and develop the best approach for incorporating feedback into project execution.
- Contribute to strategic thinking around content models that adapt, scale and expand over time and distribution platforms.

4.2.4.2 Key Teams And Roles

Business users: Product owners and input providers

- Provide overall business strategy and goals for products.
- Develop key messaging and customer segmentation strategy for online sales.
- Not involved in day-to-day management of the Web site.

Marketing: Brand awareness and site management

- Develop a strategy for product marketing across all channels, including Adobe.com
- Drives day-to-day site marketing (content changes, testing, etc.) activities.
- Provides market research and analytic support for site management.
- Partner with sales to deliver online revenue.

Sales: Online revenue and e-commerce business strategy

- Own strategy and execution for all e-commerce related aspects of the site.
- Develop growth plans and deliver to business objectives.
- Partners with marketing to deliver online revenue.

IT: Implementation and delivery

- Delivery support to site strategies and objectives.
- Develop technical strategy to deliver the business vision.
- Partners with marketing product owners to enhance the platform framework with new templates, components and capabilities.

4.3 Resources

You will need to decide the right balance and allocation of internal staff and external consultants. This will be determined by your organisation's previous experience with digital implementations and less experienced organisations may require more help from consultants.

Internally speaking, your organisation will need to implement a talent strategy to determine how to best hire and retain digital and analytic talent.

"Having the right talent and sufficient resources on your digital team is crucial to your long-term, data-driven success." Brent Dykes - Adobe

4.3.1 Resource Model

To get the most out of Adobe Campaign, and to deliver a better digital experience to your customers, you need to get the most out of the product's implementation. Investing in external resources will help you optimise your investment, mitigate project risk and identify new opportunities.

4.3.1.1 Adobe Partners

Solution partners play a critical role in your Adobe Campaign implementation. Based on your resources and the project scope, working with solution partners can help you in many different ways – from developing your customer journey, creative and user experience to building your page template and components; making necessary customisations to the implementation; integrating with other technology platforms; and providing general guidance on how to use the solution.

Adobe partners help deliver:

4.4 Community

It is good practice to encourage the creation of a digital community within your organisation. Invest in creating an environment where all members can learn from each other and share experiences, ideas, best practices and campaign wins. When you have distributed analysts and business users across different business units and countries, the digital marketing community provides valuable support to new users in addition to opportunities for more advanced users to share their collective knowledge. This is especially important in traditional businesses where up-skilling traditional skillsets with digital ones is vital. It can also be a useful forum in which to educate the traditionally minded people within your business. A digital community can be fostered in a number of different ways, such as a simple email distribution list, internal wiki, corporate chat groups and workshops.

4.5 Culture

Some organisations may be more resistant than others to embracing change when it comes to the adoption of new technologies and business processes. Despite the fact that your organisation has invested in Adobe Campaign, some leaders and employees may still have doubts about the benefits of the solution. They probably don't fully understand what analytics, automation, content management, user experience and other components of digital bring to the table. This is common in a business world that is still adapting and changing to digital.

Changing culture inside and organisation is a difficult, but not an impossible task. It usually starts by having a clear vision of the future followed by strengthening change with management tools such as role definitions and measurement and control systems. Don't forget to involve key stakeholders and share that vision of the future across the organisation. One of the main reasons why organisations fear change is because they have little or no information about the where change is taking them.

4.5.1 Developing A Cross-Channel Campaign Management Culture

Cross-channel campaign management is one of the most powerful tools you can use in your marketing artillery and it is also one of the most challenging to adopt. Getting there requires a rethink of operational processes, business objectives and technical and marketing roles. Not understanding the business requirements necessary to undertake a technology well enough may be counterproductive for the organisation.

1. **Start before the implementation:** Encourage your team to acquire knowledge on what your organisation can achieve with a cross-channel campaign management system. Assess your existing campaigns, analyse what the competitors are doing and take a further step by studying successful initiatives in other industries.

2. **Hands-on attitude:** Don't rely on third-parties to do the heavy lifting of your campaign work. Nobody knows your business architecture and what you want to achieve better than you. Gaining experience will allow you to act swiftly, optimise resources and evolve further in your marketing landscape.
3. **Orientation towards results**: Reflect results on your KPI's for campaign contribution and encourage your team to take compulsory, periodic training programs.
4. **Reward proactivity**: Encourage your team to always work towards success. An incentive may be to promote people thorough authorisation tiers to encourage better usage. In the long term this may become a 'badge of honour'.
5. **Meet and co-create:** Conduct, for example, a quarterly catch-up session to provide guidance to your team and open a space of discussion to share ideas and opportunities for improvement.
6. **Look for hybrid skill sets:** To succeed with marketing technology it is necessary to promote multi-disciplinary teams to contribute with strategic action plans, creative content production, optimise business processes and deal with technical implementations. Look for individuals who are keen to get involved in unknown territories, but also have a clear orientation to solve marketing business problems.

5 Process

In this section of the document, you will find the information to effectively deploy and use Adobe Experience Manager. There are four main types of processes: deployment, usage, sustainability and change management.

5.1 Deployment

Deployment covers the various processes related to implementing and configuring Adobe Campaign in an efficient and effective manner. The solution is based on a modern architecture and uses Web services for straightforward data and process integration with operational front- and back-end systems.

5.1.1 Deployment Options

Adobe Campaign offers cloud and on-premises deployment, and a hybrid model that enables you to outsource Internet-facing processes while maintaining confidential data in-house. It all depends on the required level of performance and security. The following graph illustrates the most common deployment alternatives:

The same technology is used in all deployments modes for easy migration.

5.1.2 Implementation Methodology

Implementing the solution requires extensive organisational efforts, resources and involvement from key stakeholders. Before the implementation project kicks-off It is important to have well-defined success criteria for the program (refer to the S.M.A.R.T KPIs outlined in the strategy section), a comprehensive change management and communication plan and be committed to the ongoing training Adobe will provide during the implementation. Adobe provides optional post-deployment resources for further upskilling in the Adobe Marketing Cloud Solutions.

Tip & Trick

The following steps are indicative and should not be applied for every implementation.

There are several phases in the implementation process. The following steps are meant to provide a guide and are indicative of what to expect in a standard, *low complexity* Adobe Campaign project. These are estimates and should not be applied for every implementation as integration and complexity can affect duration and effort.

5.1.2.1.1 Kick Off

Activities		Key Participants		Deliverables		Estimated Duration
First calls	KO meeting preparation	Customer project team	Adobe project team	Services welcome pack	KO minutes	Two weeks

5.1.2.1.2 Scoping

Activities		Key Participants		Deliverables	Estimated Duration
Functional and technical workshops	Architecture	Customer marketing user	Adobe techinal and business consultants	Functional specification	Three weeks
Mock up and live demo	Discover training (optional)	Customer architects	Adobe architects		

5.1.2.1.3 Design

Activities	Key Participants	Deliverables	Estimated Duration
Wrap up workshop	Customer marketing user	Technical specification	Two Weeks
Architecture study	Adobe Techinal and Business consultants	Architecture document and specifications	
Specification review meeting (optional)	Customer architects	Project planning	
	Adobe architects		

5.1.2.1.4 Build

Activities	Key Participants	Deliverables	Estimated Duration
Installation and set up	Adobe consultants	System available	At least two weeks (confirmed after design phase)
Data integration	Adobe architects	Project documentation	
Data integration		Test plan	
Unit tests and integration tests			

5.1.2.1.5 UAT

Activities	Key Participants	Deliverables	Estimated Duration
End user training	Key business users	UAT tracking list	three to five weeks (to be confirmed after design)
Qualifications of the discrepancies	Adobe business consultants	Training material	
Execution of the business testing plan			
Corrections			

5.1.2.1.6 Production Development

Activities	Key Participants	Deliverables	Estimated Duration
Configuration deployment	Adobe consultants	Ramp up plan	One week
Sanity checks		Deployment plan	
Qualifications of the discrepancies		Configuration document	
Corrections		System is live	

5.1.2.1.7 Final Checks

Activities		Key Participants		Deliverables	Estimated Duration
Deliverability checks	Architecture checks	Adobe architects	Adobe deliverability	Go live check list	One day
Training checks		Adobe trainer			

5.1.2.1.8 Go

Activities		Key Participants		Deliverables		Estimated Duration
Set up and send out first live campaign	Deliverability monitoring	Customer marketing users	Adobe deliberability	Pilot campaigns scenario	Adobe internal support handover	One to two days
		Adobe business consultant assistance				

5.1.2.1.9 Post Go-Live

5.1.3 Recommended Roles And Responsibilities During Business Delivery Phase

Executive sponsors	• Champions of the project and the ultimate decision-makers. • Provides support for the project manager, approves major deliverables and signs off on approvals to proceed to each succeeding project phase. • Active participant with the project steering committee.
Adobe Campaign project manager	• Responsible for ensuring the project team completes the project. • The project manager develops the project plan with the team and manages the team's performance of project tasks. • Responsible for securing acceptance and approval of deliverables from the project sponsor and stakeholders.
Customer project manager	• Responsible for ensuring the project team completes the project. • The project manager develops the project plan with the team and manages the team's performance of project tasks. • Responsible for securing acceptance and approval of deliverables from the project sponsor and stakeholders.
Adobe Campaign technical architect	• Defines and implements the technical infrastructure required to host Adobe Campaign. • Integrates Adobe Campaign with external products to provide the agreed solution. • Performance optimisation of Adobe Campaign.
Business consultant	• Help to define the marketing strategy and how to apply it in Adobe Campaign. • Help to apply best practices.
AC trainer	• Provides training at the start of the project cycle to project team members and during the project cycle prior to rollout to end-users. • Consultants transfer knowledge of customisations to end-users at rollout.
Customer marketing	• Provide business requirements that need to be implemented using Adobe Campaign. • Approve major deliverables and sign off at each project phase.
Customer IT SME	• Provide access to the customer's technical resources needed to implement Adobe Campaign. • Access external systems where integration is needed, including data sources. • Procure hardware required to host the solution in an on-premises implementation.

5.1.4 Recommended Structure For Day-to-Day Management

ROLE	COMPETENCES	WORK ACTIVITIES
Campaign manager	• Understanding of the marketing objectives including the business objectives, timing and expected financial results. • Management responsibility for the campaign designers and technology leads. • Authority and accountability to sign off on campaigns that are run in the production environment. • Project management and project deployment skills.	• Liaison between the marketing managers and IT. • Manage the campaign calendar of events and participation in planning sessions to understand campaign strategies. • Maintain involvement in the campaign lifecycle from idea creation through to results analysis. • Coordinate the collection and distribution of best practices and standards for the campaign team.
Campaign designer	• Understand the campaign marketing functional paradigm from planning through to reporting. • Familiar with strategic database marketing. • Communicate with the marketing managers. • Understand core features of Adobe Campaign (e.g., workflow, segment, channels, etc.). • Understand post-campaign analysis.	• Work with Adobe Campaign on a day-to-day basis supporting all campaign management activities. • Work closely with marketing managers to provide expertise and insight into best practices. • Ensure quality control. • Work with the technology leads to ensure campaigns are optimised for performance.
Data or technology Leader	• Expertise in all supporting marketing data, relational database structures and query techniques. • Sophisticated knowledge of the more advanced features within Adobe Campaign (e.g., audience level switching, triggers, complex templates, stored derived fields). • Good communication skills	• Ensure all data is available for the campaign designers including scores and past contact information. • Support the definition of table mappings and field usage. • Provide performance optimisation best practices. • Work with the campaign designers to establish testing timeframes and

	and a strong ability to work effectively in a team environment with the campaign designers in support of their design activities.	campaign regression tests. • Serve as a liaison to the IT Support.
Marketing manager	• Responsible for campaign planning and financial ROI. • Defines the customer-strategic segments. • Understands the integration of campaign management with the other divisions, channels and operational business lines.	• Works closely with the campaign managers and designers to define campaign requirements and objectives. • Determines promo frequency and channels to be utilised. • Estimates financial expectations and ROI objectives.

5.1.5 Communication

5.1.5.1 Communication Plan

A detailed communication plan will help you outline the approach that will be used to ensure the flow of communication among the various members of the project team, engaging the key stakeholders and any other members of the Adobe Campaign implementation project. The aim of this plan is to manage and coordinate communication, and to engage the management and stakeholders to gain their commitment to the implementation of the project.

5.1.5.2 Collaboration

Adobe Campaign deliveries can be simple or complex projects and in some cases may require teams working together.

These are some factors that can help you build collaborative teams:

- Top-level executives can boost collaborative behaviour by investing in facilities with open floor plans to improve communication.
- In organisations where senior executives are highly collaborative teams tend to collaborate well.
- Teaching employees how to communicate well and build relationships can improve team collaboration.
- When employees feel a strong sense of community it becomes easier for them to reach out to others and share knowledge.

- Collaboration improves when the roles of individual team members are clearly defined yet the team understands the objectives and goals they have to achieve together.

5.1.5.3 DACI - For Approval Authority

We see the most successful Adobe Campaign projects using a DACI (Driver, Approver, Contributor, and Informed), or similar, model in their communication strategy.

DACI is used to define roles in a way that makes it clear who has approval authority and who needs to be consulted before a decision is made and who needs to be informed once a decision has been made.

The role definitions are as follows:

Role	Responsibilities
Driver	Communicate roles and responsibilities with other team members. Make sure these roles and responsibilities are clear. Overall coordination of the project.
Approver	Approve or disapprove decisions affecting progress of the project. Some approvals may still fall under the decision of the project's driver.
Contributor	Consult and provide input to the necessary decisions. Not necessarily involved in the decision approval or disapproval.
Informed	Not necessarily has an approval role, but must be informed once a decision or change is made.

5.1.6 Administration

Adobe Campaign lets you define and manage the rights assigned to the various users. These are a set of rights and restrictions that authorise or deny:

- Access to certain features (via the named rights),
- Access to certain records,
- Creation, modification and deletion of records (actions, contacts, campaigns, groups, etc.).

Tip & Trick

Organise the users according to your requirements by creating new operator folders. To do this, right-click the operator folder and select **Add an 'Operators' folder**

The permissions apply to user profiles or user groups.

They are completed by safety parameters linked to the user's connection mode to Adobe Campaign. For more on this, refer to the Adobe Campaign Help Centre.

By default, users are stored in the "Administration > Access management > Users" node.

5.1.6.1 Access Rights Matrix

The default user groups and named rights allow users to access certain folders in the navigation hierarchy and grant read, write and delete permissions.

	User groups				
	Delivery	Access	Workflow execution	Workflow supervisors	Campaign managers
Administration					
Production					
Objects created automatically	R				
Approvals pending			RW	RW	RW
Campaign templates					RW
Campaign workflow templates					RWD
Campaign workflows					RWD
Technical workflows (campaign process)					R
Campaign management					
Typology management	R				
Delivery mappings - Typology rules	R				
Delivery mappings – Typologies	R				
Service providers					RW
Stocks					RW
Access management					
Users					R
Organisational entities					RWD
Configuration					
User dictionary	R				
System dictionary	RWD				
Reports	R				
Report templates	R				
Rendus des formularies	R				
Platform					
External accounts	R				
FOLDERS - R = read / W = write / D = delete / N = visible node					

	User groups				
	Delivery	Access	Workflow execution	Workflow supervisors	Campaign managers
Campaign management	RWD	RN			
Budgets					RW
Campaigns catalog					RWD
Campaigns orders					RWD
Deliveries	RWD	RN			
Measurement hypothesis	RWD				
Campaigns					RWD
Simulations					RWD
Profiles and targets					
Recipients	RN				
Predefined filters	RN				RW
Lists	RN				
Services and subscriptions	RWN				
Jobs	RN				
Visitors – generic imports and exports	RN				
Visitors – targeting workflows	RN		R		
Visitors recovered via a comment	RN				
FOLDERS - R = read / W = write / D = delete / N = visible node					

	User groups				
	Delivery	Access	Workflow execution	Workflow supervisors	Campaign managers
Resources	RWD				
Documents					RWD
Campaign management	RWDN				
Seed addresses	RWDN				
Personalisation blocks	RWDN				
Personalisation fields					RWD
Data distribution					RWD
Templates	RWDN				
Web application templates	RWDN				
Content models	RWDN				
Delivery templates	RWDN				
Campaign templates					RWD
Task templates					RWD
Job templates	RWDN				
Workflow templates	RWDN		R		R
Hypothesis models	RN				
Online	RDN				
Web applications	RDN				
Web tracking tags	RDN				
Public resources	RDN				
					RWN
FOLDERS - R = read / W = write / D = delete / N = visible node					

	Operator groups				
	Delivery	Access	Workflow execution	Workflow supervisors	Campaign managers
MRM					RWN
Orders					RWN
Invoices					RWN
Marketing plan					RWDN
Marketing resources					RWDN
Tasks					RWN
NAMED RIGHTS					
FILE ACCESS					
ADMINISTRATION					
START DELIVERIES	YES				
EDIT FOLDERS					
PROGRAM EXECUTION					
SQL SCRIPT EXECUTION					
EXPORT					
MERGE					
RECIPIENT IMPORT					
IMPORT					
INSERT FOLDERS					YES
PREPARE DELIVERIES	YES				
DELETE FOLDERS					
WORKFLOW			YES		YES
FOLDERS - R = read / W = write / D = delete / N = visible node					

5.1.6.2 Usage

Usage is all about establishing and leveraging best practices that will help you with your overall campaign processes. How your company uses the solution becomes critical because it will help you maximise your investment. The Audit tab lets you view information related to the user. The various tabs are automatically added to be based on the settings defined in the user's area of intervention.

This enables you to view:

- The list of rights on folders linked to the user.
- The user approvals log.
- The list of discussion forums which they are subscribed to.
- Events in their calendar.
- The list of tasks assigned to them.

On the other hand Adobe Campaign has built-in reports enabling you to immediately access rich information on user activity, failures and bounces, tracking indicators, delivery statistics and other statistics on:

Click here to see the complete list of standard repots in Adobe Campaign.

5.1.6.3 Data And Operations Security Best Practices

Physical security

- Authorised personnel should authenticate for hosting facility access using some combination of biometrics, badge or key card and PIN.
- Locations in the data centre, such as entrances, exits and racks (front and back) should be monitored with video surveillance.

- Controls should be in place for handling visitors (guests and vendors) in the hosting facility, including security guards, sign-in and required escorts.
- All systems should be housed in individually locking racks or cages.

Personnel and training

- Background checks and periodic training should be required.

Documentation

- Network and data flow diagrams should exist for the hosting environment.
- Data flows should be updated along with the network diagrams.
- Production, management and publishing of documentation should be outlined and adhered to.

Change and configuration management

- There should be a formal process outlining how change requests are submitted, tracked and managed:
    - High technical or high business risk changes – a change control document will be created with sign-off from business sponsors.
    - Low technical and low business risk changes – with change implemented after peer review.
- Documentation is required for change justification and approval.
- The change control document should contain pre-requisites, an implementation plan, a test plan, a blackout plan and post-requisites.
- Formal notification and approval process is required.
- Controls at the IT level and application level should be in place to ensure unapproved changes are not implemented.
- A staging environment should exist for testing and verifying system changes and updates.

Identity and access management

- Formal user provisioning process for administrator and user accounts, including the approval and documentation process.
- Common technologies or systems should be used to centralise or synchronise administrative or user accounts across systems (e.g. LDAP, RADIUS, Active Directory).
    - Systems, applications and devices not handled by centralised account management should be documented.
- Administrator account lists should be reviewed regularly (e.g. quarterly or every six months).
- Shared accounts should be managed and protected (e.g. root, application accounts and administrators).

*Tools and controls should be in place to monitor privileged user activity.

System provisioning

- An automated build environment is preferred.
- Customised and secure operating system and application builds should be used.

- New systems should be built and configured in an isolated environment.
- Basic network scans and peer reviews should be used to validate and verify systems prior to production deployment.

Systems administration and management

- Develop scripts to alert of system failures.
- Remote desktop protocol with a high encryption pack should be used for individual system management.
- Encrypted protocols and applications are required for systems management, including file transfers.
- Multi-factor authentication (e.g. smart cards, certificates, authentication tokens) is required for remote access to the environment.
- Systems, applications and devices should be administered, monitored, provisioned and backed up via a dedicated management network (e.g. a network that does not support production customer traffic flow).

Monitoring alerting and review

- A dedicated 24 hour security operations centre is ideal for systems monitoring.
- System, application and device logs should be centralised:
    - Logs should be retained for six months.
    - Logs should be analysed and reviewed regularly (e.g. daily or weekly).
- Tools should be in place to provide system, application and device monitoring.
- System alerts should be sent to all system administration staff.
- The following events should generate alerts: user created, group modified, system rebooted and application or service restarted.

Security testing and assurance

- Vulnerability scans and penetration tests should be performed quarterly.
- Formal process and firm timelines should be in place for remediating vulnerabilities discovered during security assessments.
- Third-party and vendor resources should be monitored for news and information about security issues and vulnerabilities.

Incident response

- Security incident response policies and procedures should be published and current.
- Incident response programs and processes should be tested annually.
- Forensic analysis and investigation performed when required (e.g. internally or using an external investigator).
- Breach notification and disclosure procedure for relevant incidents (i.e. when personally identifiable information is compromised) should be documented.
- The root cause analysis process for major incidents (e.g. P1s or system down) should be initiated immediately and involve the direct responders and service owners:
    - A preliminary incident report should be provided to include a list of open investigations and action items.

- A final report should be provided once the investigations are completed. These should be stored in an online application and posted to a general wiki.
-

Security devices and applications

- Create a firewall policy in line with your data and systems infrastructure.
- Intrusion detection and prevention systems should be used in the environment. They should be network and host-based.
- Anti-virus and anti-malware controls should be used in the environment.
- Signature-based systems should be updated daily and as needed.

5.2 Workflows

5.2.1 Campaign Creation Recommended Workflow

The above chart illustrates the typical five stages involved in the typical campaign creation:

- **Campaign brief:** In this phase the stakeholders determine what the purpose and vision of the marketing campaign management system will be, what the expected results are and how the creative work will be communicated.
- **Target:** This phase relates to the flow of data required to be structured to support the cross-channel campaign efficiency. Key aspects of data management include, collection mechanisms, integrated systems, hygiene tools, frequency of updates, merge or purge, house holding, address standardisation, cleansing, target segmentation, personalisation and reporting.
- **Delivery:** In this phase the appropriate channels are selected for campaign success.

- **Campaign execution:** This phase determines if a campaign has been approved and is ready to be launched by different stakeholders.
- **Monitoring:** Here it is possible to gain ongoing visibility of all online and offline campaign results.

5.2.2 Marketing Campaign Cycle

Adobe Campaign allows you to coordinate the creation of conversational and experiential marketing campaigns across the marketing campaign cycle.[1]

The marketing campaign cycle

[1] The features described below are not available in all versions of Adobe Campaign. The discovery sessions will allow you to understand your business' requirements and the best approach to satisfy them to decide the technology you will implement in your organisation.

5.2.3 Marketing Data Management

Adobe Campaign has multiple mechanisms for acquiring and handling profiles across the lifecycle. Each profile matches a database entry which contains all the information required for targeting, qualifying and tracking individuals. In this sense, profiles can be identified as customers, prospects, newsletter subscribers, users, recipients or any other denomination your organisation might have. By gaining insights into a consumer's full-channel interaction history and through integration with social channels like Facebook, companies can capture demographic information, transaction history and preferences like never before. The integrated customer profile helps companies drive decisions about how to better engage customers and to understand which channels are most effective for reaching specific consumers.

Tip & Trick

Adobe Campaign's customer profile capability allows you to build individual profiles for each of your customers, capturing their interests, activities and interactions to create more compelling marketing experiences across all online and offline channels.

How to manage profiles

It is recommended to build up this database integrating different mechanisms such as online collection via Web forms, manual or automatic import of text files and replication with company databases or other information systems.

5.2.4 Targeting Segmentation And Analytics

Adobe Campaign helps you easily identify and target customers and prospects more effectively across all your marketing channels.

Marketers can use information from integrated customer profiles leveraging things like social media interests or channel preferences to define custom audience segments to which they can target content and offers through specific channels.

In addition, Adobe Campaign provides a single visual environment which seamlessly brings together channel workflows and targeted segmentation so organisations can easily build personalised customer journeys.

Tip & Trick

Adobe Campaign targeted segmentation allows you to create personalised experiences, including one-to-one messages, using information like interests, demographics, and channel preferences.

The Adobe Campaign Help Centre has more about reports, filters and

Adobe Campaign has powerful, user-friendly segmentation and targeting features that help you create highly targeted, differentiated offers. The descriptive analysis functionality lets you analyse information upstream and downstream of your marketing campaigns and the filter management and graphical query editor features let you filter your subscriber population and sample or create target groups based on an unlimited number of criteria.

5.2.5 Collaborative Content Management And Personalisation

Adobe Campaign enables advanced personalisation of message content and headers based on customer profiles and preferences which improves customer engagement and response rates. The Adobe Campaign personalisation engine assembles every message individually according to criteria related to the targeted recipient. Any field from the Adobe Campaign database or from external data sources can be used to define a personalisation condition.

The personalisation engine works in exactly the same way for all communication channels: email, direct mail, mobile, call centre, etc.

Learn more about the content management module.

5.2.6 Cross-Channel Campaign Execution

Adobe Campaign provides integrated, cross-channel campaign management and execution that enables you to orchestrate targeted and personalised campaigns on multiple channels, such as email, direct mail, SMS, MMS, WAP Push, etc. A single interface provides you with all the functions required to schedule, orchestrate, configure, personalise, automate, execute and measure all your campaigns and communication.

Tip & Trick

Adobe Campaign delivers unique, relevant experiences to your customers though all the right channels.

Click to read on how to create workflows

Adobe Campaign also integrates with other Adobe Marketing Cloud solutions to make the most of available resources. For example, marketers can create templates in Adobe Experience Manager and embed personalisation fields to efficiently create campaign content for all online and offline channels.

5.3 Sustainability

Marketers often struggle to create a roadmap of campaign creation, system upgrades and maintenance, resource management to achieve the envisioned marketing strategy and respective corporate goals over time. In fact, it is important to start planning as soon as the deployment project kicks off to fully evaluate and understand how Adobe Campaign will align with the overall business strategy; how it will serve your customer's journey (and through which channels); and how cross-functional channels and resources will be involved to ensure the solution is maintained, fully used and, most importantly, scaled.

5.3.1 Maintaining A Single View Of The Customers

Ensure your data architecture consistently collects and consolidates all customer-related data into a single marketing view. The more demographic, transactional, behavioural and aggregated data is gathered in centralised systems the more challenging it is to keep up maintaining its consistency. This factor is critical as the solution evolves along with your business.

5.3.2 Process To Adopt Traditional Or Emerging Channels

Channels evolve and serve differently objectives over time. In this sense, it is considerably important to create a mechanism of channel evaluation to seamlessly report and assess existing ones, and integrate new ones, with your marketing mix.

5.3.3 Track And Upgrade

There two views on this topic. The first relates to how you document the past (campaigns, processes and deployments) and the second is how you ensure the people and physical resources will be kept up to date with new technology frameworks, trends in the market and usage best practices.

5.3.4 Optimise And Report For Success

Maintain constant relevancy and workflow success by investing time measuring channel success, deliverability and return on investment. Encourage the key stakeholders to have frequent meetings where they report on testing procedures, success metrics, challenges and ideas.

5.4 Change Management

Change management is about managing the people side of change. In order for this to happen, leaders, employees and partners may need to adjust existing attitudes and behaviours.

To define a change management mission:

- Ensure documentation of all proposed changes.
- Ensure verification of technical completeness.
- Ensure timing of change executions does not conflict.
- Ensure appropriate management involvement and approval (e.g. sign-offs, approval, deferral).
- Ensure the verification of successful testing to the degree required by organisation standards before change introduction.
- Ensure documentation of actual change to enable communication of change results, provide a history of changes and support the maintenance of systems documentation.

To define change management guidelines:

- Monitor all changes.
- A formal change management system must be in place.
- Define the change management lifecycle functions.

6 Technology / Product

By becoming a data-driven business your organisation will head towards enhanced decision making processes that deliver better value to *all* stakeholders. Adobe technology should act as an enabler – empowering your organisation to manage cross-channel campaigns, obtain data and act on it. This section will take you through how Adobe Campaign was built to fit your business requirements; how it integrates with other platforms to leverage its power; what the best practices are to ensure the platform is deployed efficiently and has sufficient levels of support and professional services; and how you can leverage its automation capabilities to manage cross-channel campaigns and democratise data to empower disparate end-users to answer routine business questions.

6.1 Solution Fit

6.1.1 General Solution Architecture

6.1.2 Detailed Solution Architecture

Adobe Campaign is based on a service-oriented architecture (SOA) and comprises several functional modules. These can be deployed on one or more computers (in single or multiple instances) depending on the constraints of scalability, availability and service isolation (see

deployment options). The scope of deployment configuration options is therefore broad and spans a single, central computer through to multiple dedicated servers across multiple sites.

The usual layers of a multi-tier application are presented as follows:

6.1.2.1 Presentation Layer

This layer is related to the way users experience and interact with the platform. The application can be accessed in different ways, depending on users' needs: rich client, thin client or API integration.

- ***Rich client:*** The main user interface of the application is a rich client, in other words, a native (Windows) application that communicates with the Adobe Campaign application server solely with standard internet protocols (SOAP, HTTP, etc.).
- ***Thin client:*** Certain parts of the application can be accessed via a simple Web browser using a HTML user interface, including the reporting module, delivery approval stages, features of the distributed marketing module and instance monitoring. This mode makes it possible to use Adobe Campaign functionality from an intranet or an extranet.
- ***Integration via the APIs:*** In certain cases, the system can be called from external applications using the Web services APIs exposed via the SOAP protocol.

6.1.2.2 Logical Application Layer

Adobe Campaign relies on a set of server-side processes that work together to support its capabilities. The following are a list of different services and processes implemented in the servers:

- **Application server:** This process exposes the full range of Adobe Campaign functionality via Web services APIs (SOAP: HTTP + XML). It can dynamically generate Web pages used for HTML-based access (reports, Web forms, etc.).
- **Workflow server:** This executes the workflow processes defined in the application. It also handles periodically executed technical workflows, including: tracking, clean up and billing.
- **Delivery server:** This process functions as an SMTP mail transfer agent. It performs "one-to-one" personalisation of messages and handles their physical delivery. It functions using delivery jobs and handles automatic retries. In addition, when tracking is enabled, it automatically replaces the URLs so they point to the redirection server. This process can handle the customisation and automatic sending to a third-party router for SMS, fax and direct mail channels.
- **Redirection server:** For email, Adobe Campaign automatically handles open and click tracking (transactional tracking at the Web site level is a further possibility). To achieve this, the URLs incorporated in the email messages are rewritten in order to point to this module, which registers the passing of the Internet user before redirecting them to the required URL.

  To guarantee highest availability, this process is fully independent from the database: the other server processes communicate with it using SOAP calls (HTTP, HTTPS and XML) only. Technically, this functionality is implemented in an extension module of a HTTP server and is available for Windows only.

6.1.2.3 Integration Layer

This layer represents all the processes that take place to mobilise data in and out of the platform. It is comprised of various CRM and Enterprise applications, databases and other protocols that allow effective data flow through the system such as tracking data (opens, clicks, redirects).

6.1.2.4 Persistence Layer

This layer is comprised by the databases that contains almost all the information managed by Adobe Campaign. This includes both functional data (profiles, subscriptions, content, etc.), technical data (delivery jobs and logs, tracking logs, etc.) and work data (purchases, leads).

6.1.2.5 Execution Layer

These are the channels which Adobe Campaign uses to communicate with the recipients. The following systems are supported:

- Email
- Direct mail
- Fax
- SMS and MMS
- Social channels (Facebook, Twitter)
- Mobile access (iOS, Android)

6.2 Integrations

6.2.1 Third-Party Integrations

Adobe Campaign is highly configurable and has out-of-the-box connectors with third-party databases and business intelligence solutions across both online and offline channels:

Data sources	Business intelligence	Channel execution	Off-line channels
• Adobe Campaign leverages data from CRM, Web analytics, e-commerce and Web content management solutions, social and rating solutions and datamarts to enrich customer profiles and to personalise campaigns.	• Adobe Campaign can be complemented by business intelligence and predictive solutions to slice and dice Adobe Campaign data to enhance customer knowledge through behavior scoring.	• For direct mail and SMS routing Adobe Campaign relies on dedicated solutions to complement core Adobe Campaign execution capabilities with expert, best-of-breed solutions.	• Adobe Campaign also connects with call centre and point of sale management systems to include offline relationship channels in cross-channel strategies.

6.2.1.1 Commonly Used Integrations

Below are the most common applications integrated with Adobe Campaign:

Tip & Trick

Adobe is constantly releasing new integrated applications. See what is new at Adobe Campaign Exchange.

For CRM

These synchronise fields like contacts, accounts and purchases. Adobe Campaign provides a wizard for collecting and selecting data from tables available in the CRM. This guarantees bi-directional synchronisation to make sure data is up-to-date at all times throughout all systems.

- Oracle CRM On Demand
- Microsoft Dynamics CRM
- Salesforce.com

For data and content

These leverage the consumer intelligence, integration and profiling data and connect them to the powerful multi-channel delivery capabilities of Adobe Campaign to provide relevant, personalised and immediate one-to-one marketing conversations based on insights. The following are common connectors used:

- IMPACT 360
- Gigya
- MarketMix

For SMS delivery

The following connectors allow you to perform mass personalised delivery of SMS messages to address customer needs when they experience them.

- mBlox SMPP
- SAP SMS Connector

Mobile

This enables you to manage all mobile touch points, including Passbook and Google Wallet, SMS and MMS, push notifications and mobile Web through an easy-to-use, cloud-based interface.

- Vibes

6.2.2 Adobe Marketing Cloud Integration

In order to provide a comprehensive experience across multiple channels, marketers are often forced to manage various and disconnected solutions. This can pose quite a few challenges for marketers.

Fortunately, marketers can leverage different Adobe Marketing Cloud solutions to improve marketing effectiveness using Adobe Analytics for performance management, Adobe Experience Manager for content creation and Adobe Campaign for cross-channel campaign management.

The following are the most commonly integrated Adobe Marketing Cloud solutions:

6.2.2.1 Adobe Campaign And Adobe Analytics

With this integration, marketers can attain greater visibility into customer behaviour by unifying online and offline data and gain precision in measuring conversion by exploring audience behaviour via Adobe Campaign.

Adobe Analytics can also be used to identify behaviour in real-time to trigger cross-channel campaigns in Adobe Campaign. One senses (Adobe Analytics creates and drives data) and one acts (Adobe Campaign leverages that data for dynamic content, personalisation and delivery).

6.2.2.2 Adobe Campaign And Adobe Experience Manager

Adobe Campaign, combined with Adobe Experience Manager, allows marketers to streamline content creation within campaign processes, eliminate technology silos (and complex data flows) and accelerate time to market. Marketers can leverage content managed in the Adobe Experience Manager authoring environment to build highly engaging outbound campaigns. Marketing assets designed in Adobe Creative Cloud (managed and validated in Adobe Experience Manager) can be published in a campaign orchestrated across channels through Adobe Campaign.

6.2.2.3 Adobe Campaign And Adobe Target

With this integration, marketers can use contextual targeting data such as location, preferences and date and time to deliver and optimise unique email experiences. Adobe Campaign, with the

help of Adobe Target, can tailor email experiences in real time to adopt the form of appealing messages to ensure email content is always up to date. The two solutions work together to build more meaningful relationships and improve customer value, loyalty and affinity to the brand.

6.2.2.4 Adobe Campaign And Profile And Audiences

Audience data can also be brought into Adobe Campaign from other marketing cloud solutions such as web behaviour from Adobe Audience Manager to further refine and enrich identified customer profiles, allowing marketers to deliver direct marketing campaigns that are personalised and relevant. Similarly, Adobe Campaign can share data with the rest of the Adobe Marketing Cloud.

6.2.2.5 Adobe Campaign And Adobe Media Optimiser

Advertisers can leverage the technology of Adobe Target to deliver consistent, relevant and personalised experiences across multiple channels, connecting earned and owned media with paid media for optimal marketing results.

6.2.3 Democratisation

Adobe Campaign allows you to generate reports in various contexts and to meet different needs. Adobe Campaign reports are dedicated to analysing and representing data. The following are the tools found in the solution:

1. Standard reports: Adobe Campaign offers a set of reports on deliveries, campaigns, platform activities, optional functionalities, etc. These reports are available via the various features which they relate to. They can be adapted to suit your specific needs.
2. Descriptive data analysis: Adobe Campaign provides a visual tool for producing statistics on the data in the database. You can create descriptive analysis reports using a dedicated wizard and adapt their content and layout depending on your needs.
3. Personalised reports: Adobe Campaign enables you to create reports on the data in the database. Once these have been created, they are made accessible in the appropriate context. Depending on the complexity of the queries, calculations and volumes, the data analysed in these reports can be collected via a query and pre-aggregated in a list (a 'data management' type workflow) or in a cube (using Adobe Marketing Analytics). It will be displayed in the form of a pivot table or a group list.
4. Analysis reports: Adobe Marketing Analytics enables intuitive data exploration. For more on this, refer to the exploring section.

Tip & Trick

For more information on reporting visit this link.

6.2.3.1 Analysing Needs

To optimise the creation, use and durability of a report, you need to take a close look at the needs you want to meet. This first analysis will enable you to identify the type of report to create and the best creation mode. To create the report, apply the following steps:

1. Identify the need: The first step is to clearly identify the need, including what you want to show in your report and what its goal is (monitoring, analysis, data export, etc.). Adobe Campaign offers a wide range of reporting capacities. It is important to analyse your need to identify the most suitable functionality.

   With Adobe Campaign you can:

   - Explore the data in the database and define measurements (via Adobe Campaign).
   - Add indicators to an existing report.
   - View the data in the database (via the descriptive analysis wizard).
   - Create a new delivery report.
   - Export data from the Adobe Campaign database (via workflows).
   - Create a pivot table.
   - Explore aggregated data.
   - Use a wizard to analyse data (via the descriptive analysis wizard).
   - Analyse large volumes of data.

2. Identify the target population: Identify who the report you want to create will target, know the kind of people who will view it and the report display mode (in a browser, in Adobe Campaign, for a specific object, for the entire platform, etc.).

   You can also create reports for:

   - All Adobe Campaign users.
   - Users with rights to access a marketing campaign only.
   - A single user for temporary use.
   - All users in Web access, etc.

3. Define the content: Find out what type of data you want to display like delivery indicators and reports on the database profiles. You also need to know the nature of this data (simple, resulting from a calculation, significant, etc.), its location (in Adobe Campaign, in a third-party system), its update frequency to define the calculation periodicity (daily, weekly, on-the-fly) and its volume.

6.2.4 Automation

Adobe Campaign is designed at its core to provide businesses with all the benefits a marketing automation tool can provide, meaning your organisation can reallocate resources to more strategic areas.

- Financial: Creating a cross-channel contextual campaign requires a high degree of technical automation to be able to perform at its best. Once the processes are set up, data, assets, media and content will flow dynamically, generating operational efficiencies. Your organisation will be able to build upon what exists and find new creative opportunities. Adobe Campaign also allows marketers to gain visibility of budget spending and monitoring of results in real time, hence, empowering your organisation to act quickly and respond to consumers' needs.
- Processes: The Adobe Campaign interface allows you to easily plan and build cross-channel marketing campaigns.
- Stakeholders: Adobe Campaign was built to guarantee a secure flow of information among team members restricting how sensitive data is shown and handled.
- Reporting: Adobe Campaign allows you to monitor and report on key performance indicators. You can also build customised reports and schedule periodic insight deliveries so stakeholders can take actions.

6.3 Leveraging Your Investment (The Big Picture)

The Adobe Marketing Cloud includes powerful Web analytics and Web site optimisation products that deliver actionable, real time data and insights to drive successful online initiatives. It offers an integrated and open platform for online business optimisation and consists of applications to collect and unleash the power of customer insight to optimise customer acquisition, conversion and retention efforts in addition to the creation and distribution of content.

Once you are up running with Adobe Campaign and want to raise your digital capabilities to the next level, you might want to go back to what the fundamental business needs are. We see a common trend among Adobe Campaign users purchasing Adobe Experience Manager (AEM) as a next step in order to improve their Web and mobile experiences. Clients who feel they have a gap in acquisition or want to improve their customer reach, opt to follow their AEM or Analytics purchase with Adobe Social, Campaign or Media Optimiser depending on their specific needs.

If your objective is to increase personalisation and engagement we suggest you purchase Adobe Target together with Adobe Audience Manager. This will help you test and personalise content across channels and extend audiences across solutions. In the specific case that you manage high volumes of video content, and want to improve your video delivery across channels and devices, Adobe Primetime will help here.

Continue growing your digital marketing strength and add a new Adobe Marketing Cloud solution based on what your business demands. A good level of integration across solutions will help you make, manage, measure and monetise your content across every channel and screen.

7 Checklists

7.1 Campaign Management Fulfilment Checklist

The following list highlights some specific high-level points. It is not meant to be exhaustive, but aims to give some pointers and provide a basis for your own checklists. You and your Adobe customer success manager can use the first checklist to qualify which or our recommendations from this document have been put in place.

Item	Description	
Business strategy	Understanding short and long term goals and priorities.	
Users, processes and stakeholders	Determine the user's structure and subsequent roles. Assign responsibilities based on skills and level of involvement with the solution.	
Security and data management	Map out users, groups and application security access for each one.	
Data management	Identify data collection methodologies and the data model for your organisation upon the implementation of Adobe Campaign.	
Integration	Determine all current integration points between the marketing system and other systems.	
Web forms and data capture	Identify all the Web forms that capture data on your site describing their primary purpose and what happens upon completion.	
Analytics and segmentation	Determine your current prospect and customer segments across the different lines of business.	
Content and offer management	Identify the creative content to be used for campaign management purposes and describe how the content will be managed, including by key stakeholders.	
Campaign design and planning	Determine key processes to support the marketing campaign lifecycle from planning and execution through to measurement.	
Campaign execution	Detail specifics around campaign execution throughout the different channels.	
Reporting and measurement	Describe what types of operational or performance reporting is needed in your organisation, including procedures, protocols and stakeholders.	
Digital analytics and tracking	Determine how data will be leveraged in the customer profiling and marketing campaigns.	

8 Active Use of Adobe Campaign

Are you using Adobe Campaign at its full potential?

Have a look at the entire list of features and capabilities and assess the degree to which your organisation is using the solution.

This list does not represent all the versions available of Adobe Campaign. Ask your business consultant about the features available in the solution implemented in your business.

9 Adobe Consulting Operational Maturity Review

Operational Readiness Assessment and Recommendations - $6k (per brand or business unit)

Adobe Consulting provides a package to review your operational business readiness and provide a recommended roadmap of initiatives to accelerate your maturity. This service is highly recommended if you are new to the solution and need assistance in evaluating your capabilities.

Activities include:

- Conference calls and meetings to interview the executive sponsor.
- Consulting guidance on completing the solution maturity assessment.
- Consulting walk through of maturity operational readiness checklist.
- Qualification of current documents, templates and processes.
- Draft initial findings and highlight focus themes reviewed with executive sponsor.
- Executive sponsor sign off.
- High-level roadmaps of recommendations presented to the stakeholder group.

Tip & Trick

Also use the self-assessment tool designed to help you identify your organisation's strengths and prioritise focus areas in Adobe Campaign and integrated Adobe Marketing Cloud Solutions

10 Adobe Campaign Templates

10.1 Campaign Measurement Template

10.2 Deep Dive Insights Request Template

Deep dive insights request

Reporting Date:

Start Date:		**End Date:**	
Date Required if request is once off:		Split of Results Day/Week/Month:	
Request Purpose:			
The business questions you are looking to answer:			
Your Name:		Address:	
Email:		Business Priority:	
		1:As soon as possible 2:Next week 3: When you can get to it	
Please list urls or provide an attachment:			
Reporting Depth:	☐ Data block ☐ Tabulation ☐ Graphs ☐ Comments on Analysis ☐ Brief Analysis ☐ In-depth analysis and insights	Do you Require:	☐ Screenshots ☐ Reporting instructions for duplication ☐ In Excel 2003 ☐ In printable format ☐ ExcelClient Data blocks for updating

11 Adobe Campaign Glossary of Terms

Behaviour rule

Type of scoring rule based on a person's behaviour, such as document downloads, clicks in emails and event attendance.

Campaign optimisation

An option that lets you host and monitor delivery sending. To avoid conflicts between campaigns, Adobe Campaign can test various combinations by applying rules and constraints that have been defined. This lets you make sure the messages sent meet the expectations or needs of the customer and are in keeping with corporate communication.

Campaign workflows

A string of activities that let you simulate the stages of the campaign's life cycle.

Campaign management

The tactical and operational vision of marketing campaigns using plans, programs and campaigns.

Campaign ROI

A return on investment (ROI) report for a marketing campaign that lets you compare the implementation costs and the opportunities generated.

Dashboard

A set of configurations concerning the content and layout of the home page. Each Adobe Campaign user has their own dashboard.

Data management

A set of features materialised by workflow activities for meeting complex targeting needs by offering more efficient and flexible tools. This enables coherent management of all communication towards a contact using information linked to their contracts and subscriptions to their reactivity regarding deliveries.

Delivery reports

A summary of the delivery actions and their impact on recipients. Each report details tracking information on a delivery (an information service, etc.) and is accessed via the client console or a Web browser.

Demographic rule

A type of scoring rule based on profile data, such as subscription forms or answers to surveys (field of work, position, company size, number of employees, etc.).

Distributed marketing

An Adobe Campaign option that lets you set up collaborative campaigns between central entities like company headquarters and marketing services and local entities including points of sale and regional agencies. This collaboration is based on a shared space, the Campaign Catalog, where templates and campaign instances created centrally are made available to local entities.

Event (workflow)

The message forwarded to an activity when a transition is activated. This message includes a certain amount of variable information that can be processed by the destination task. For instance, a “File collector" activity provides the name of the received file.

Event queue

Each Message Centre execution instance has its own queue of events which contains events from external applications. As soon as an event is changed into a message, it exits the queue.

Hypothesis

An evaluation of the recipients' reaction following a delivery.

Implicit identification (interaction)

An offer space option that uses an inbound channel. This option lets you identify a contact via a cookie and make them an offer proposition based on their browsing history.

Import template

A set of predefined configurations for importing data into Adobe Campaign. These templates are instantiated (re-used) for individual imports.

Import wizard

A set of screens that lets you configure and execute data imports.

Incremental query (workflow)

Workflow activity that lets you periodically select a target based on a criterion and exclude the people previously targeted based on this criterion.

Information service

Recurring delivery (a newsletter, for example) that a recipient can be subscribed to.

Intersection (workflow)

Workflow activity that lets you extract only the population sharing all inbound activities.

Invalid domain

A synchronous error forwarded by the SMTP server indicating that the email address domain is erroneous or no longer exists.

Itemised list

A list of values offered by the system to enter certain fields. Itemised lists let you standardise the values in these fields and guarantee easy input and use within queries.

Journal

The object processing journal. For deliveries, the journal is available via the dashboard and it contains all the messages linked to the delivery.

Landing page

A Web page which the user accesses by clicking a banner or a link. The aim is usually to encourage the user to make a purchase, subscribe to a newsletter or fill in a form.

Lead generation

The general marketing process for acquiring, nurturing and distributing leads that integrates with sales management systems that take on the rest of the customer cycle.

Lead nurturing

The process of communicating and interacting with leads who are not quite ready to be handed over to the sales department.

Lifecycle (leads)

A set of possible statuses when a lead is processed in Adobe Campaign.

Marketing resource management (MRM)

Marketing resource management is an Adobe Campaign application that manages campaigns within the framework of marketing plan programs or sub-programs. In addition to campaign management features, MRM lets you manage tasks, targets and delivery outlines linked to campaigns and programs.

Permission marketing

A marketing type that, unlike spam, requires the target's permission (opt-in) before delivering a message.

Personalisation fields

Fields placed in the content of messages delivered in view of inserting information from the data source (an Adobe Campaign database or external file) such as the contact's name or their customer number.

Profile

An entry in the database that contains all the information required for targeting, qualifying and tracking a person. It can be identified by its storage space. A profile can be a recipient, a visitor, a user, a customer or a subscriber.

Program

An Adobe Campaign directory that lets you store and track campaigns. A program lets you define marketing actions for a calendar period like a launch, prospect search or loyalty plan. It is part of an Adobe Campaign plan. Each program includes campaigns and they are displayed in the calendar of the program they are linked to.

Remarketing campaign

Campaigns are started automatically once Adobe Campaign has finished recovering the segments from analysing the behaviour of people targeted by the initial campaign. In case of cart abandonment or product viewing without a purchase, the concerned recipients are sent a delivery to encourage them to make a purchase rather than simply browse.

Scoring rule

A rule that lets you assign points to leads based on various criteria, including BANT, demographical or behavioural.

Seed addresses

Additional addresses not included in the target that are purposefully injected into the target population to detect fraudulent use and monitor campaign reception.

Task

An action to be carried out within the framework of a marketing campaign and assigned to a user or Adobe Campaign user group.

Web tracking

Collects information on the browsing history of Web site users using Adobe Campaign tags (or URLs) sent to the redirection server via an HTTP query.

Workflows

A set of features grouped into activities that let you schedule and automate specific processes like delivery sending, approval processes and file transfers. The various workflow activities also let you manipulate data, enrich it and collect information stored in an external database.