# A simple plan for deploying Adobe Journey Optimizer.

Our five-step process for a painless implementation.

Prioritizing the customer journey isn't always easy. It requires relentless commitment and investment in the customer experience. But if you're reading this, chances are your team is already considering becoming a customer-obsessed organization—you may even join the ranks of experience-driven businesses that [drive greater customer retention and lifetime value](#). If that's the case, you'll be able to achieve these goals with [Adobe Journey Optimizer](#).

Implementing Journey Optimizer is the fastest way to streamline and automate multi-channel journeys. And it's the smoothest way to create a consistent customer journey—regardless of inconsistent customer behavior.

It's also the most efficient way to activate the next best action that leads to conversion. And, best of all, it's surprisingly simple and straightforward to implement—with Adobe supporting you every step of the way.

This eBook provides a brief overview of our straightforward implementation process for Adobe Journey Optimizer.
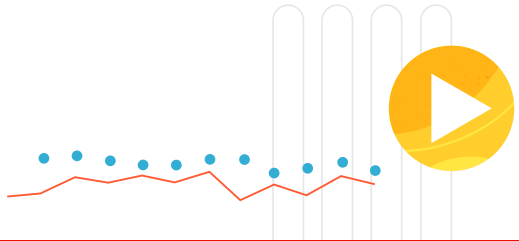
" I've seen a lot of solutions be put together and used in different ways, and I'm excited to have [Adobe Journey Optimizer] bring together not only what we have at Adobe, but what you already have.

**Russ Lewis**
Group Product Manager for Adobe Journey Optimizer

# Step #1—plan your roadmap.

The main goal of this step is to set expectations for the deployment timeline. For example, let's say you're a fashion retailer that interacts with customers through multiple in-person stores, a mobile app, an ecommerce storefront, and a large email list. Your timeline should make it clear when each channel will be connected to Journey Optimizer. For example, if email generates more conversions than other channels, you may prioritize it in your timeline.

A timeline for a "minimum viable" deployment of Journey Optimizer can be roughly 16 to 22 weeks.

From a technical point of view, your Journey Optimizer timeline should cover the configuration of:

- Channels
- Rules
- Segments
- Events

- Journeys
- Subscription process
- Offer decisioning

Generally speaking, a timeline for a "minimum viable" deployment of Journey Optimizer can be roughly 16 to 22 weeks, depending on your business requirements and readiness for implementation.

# Step #2—choose your implementation partner.

The next step is to identify the best possible deployment partner for your business. Ideally, your partner should have extensive experience with data modeling and ingestion in Adobe Experience Platform as well as experience managing end-to-end implementations of Journey Optimizer. Other considerations include potential partners' knowledge of your industry and availability in your time zone.

Adobe Professional Services is the leading provider of implementation services for Journey Optimizer. We have extensive experience with all phases of deployment, from discovery and design through user acceptance testing, launch, and final delivery. This means we can easily connect Journey Optimizer to the rest of your environment.

# Step #3—design a phased implementation.

Planning your implementation in phases can help you realize value quickly and gain user acceptance. Each phase should gradually extend your implementation to new use cases and/or channels.

## Your Journey Optimizer implementation phases.

### First phase—building foundational use cases.

During this first phase, you can identify the data sources you need to connect, map them to customer profiles, and determine how data will be ingested. Whenever possible, we recommend streaming ingestion, which will allow you to refresh profiles in real time.

At this stage, you should focus on mapping data that will support a simple and flexible use case for Journey Optimizer, such as automating newsletter and email journeys. Ideally, you should build a foundation that allows marketers to easily add use cases without requiring a lot of work from IT.

When evaluating which data sources to prioritize, consider the answers to these questions:

- What limited set of data is needed to create valuable tests?

- Where can we source this data in real time?

- How often do we need this data?

- What format and ingestion strategy will be most useful?

- Which events will be helpful to capture?

- How will we stay compliant with regulatory and privacy requirements?

### 🌓 Second phase—strategically adding more advanced use cases.

Once you've established a foundational data model for a simple use case, such as an email journey, you can extend it to support more complex use cases. Often, our clients opt to start with a simple offer decisioning use case, in which users' responses to email content determine the offer they will receive.

### 🔴 Third phase—creating an event catalog for unitary events.

Next, we suggest creating an event catalog for unitary events. Unitary events can be rule-based or system-generated and configured to define the information Journey Optimizer will receive. They are typically linked to a person and relate to their behavior.

For example, a unitary event occurs when a person reaches 10,000 loyalty points. Journey Optimizer will listen to this event in a customer journey to orchestrate the next best actions. A catalog of these events may be configured either across multiple steps of a single journey or within various journeys.

Your event catalog will allow Journey Optimizer to support and automate a wide range of customer journeys. Ideally, you should start considering important events in your customer journey and determining where you can acquire this data during the first phase. Setting it up usually takes around three months.

### 🔴 Fourth phase—implementing additional channels.

At this point, you can start building data models and business rules for additional channels, such as push, in-app, SMS, and more. Often, we find it's easier to set up these channels and integrate them into journeys after you've started using Journey Optimizer with simple email and newsletter journeys (as discussed in the first phase).

The typical amount of time needed to set up an event catalog is 3 months.

This work can be done parallel to the previous phase, in which events are configured for additional channels besides email. New channels can be added through channel surfaces—or message presets—that define all the technical parameters required for your messages, including email type, sender email and name, mobile apps, and more. Once channel surfaces have been configured, you will be able to select them when creating messages from a journey.

### 🕐 Fifth phase—implementing business events.

"A business event in Journey Optimizer allows a brand to start a journey using a non-people-related event," explains Adobe group product manager, Russ Lewis. Developing use cases related to business events helps users build journeys informed by business best practices. These use cases can include:

- The start of an event—notifying the interested segment of individuals

- Restocking of a product—notifying the individuals who've browsed that product

- Occurrence of a price drop—notifying individuals who are interested

Like creating an event catalog in the third phase, implementing business events starts by configuring them within the Journey Optimizer dashboard. Similarly, this takes about three months.

# Step #4—align internal teams.

At every phase of your deployment, it'll be critical to generate enthusiasm about the benefits of using Journey Optimizer. Marketing teams will need to understand how it can help them achieve key objectives, like retaining customers and increasing conversions. And IT will want to know how it will help them spend less time on such routine tasks as manually gathering customer data from various sources and building customer profiles by hand.

Generate enthusiasm about the benefits of using Journey Optimizer. Continually track how teams are using it and how it's impacting their performance.

# Step #5—continue to measure performance to help your teams improve.

As you roll out Journey Optimizer, it's important to continually track how teams are using it and how it's impacting their performance. Every quarter, you should have a "state of the system" discussion, highlight what's working, identify opportunities for improvement, and gather a wish list for future use cases and functionality.
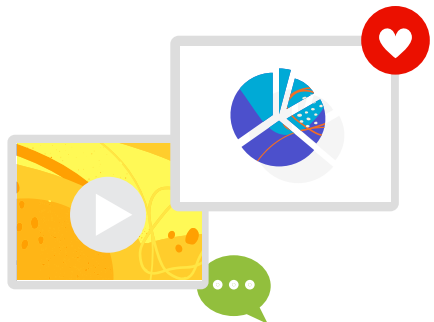
# Why Adobe Journey Optimizer?

Journey Optimizer is an agile and scalable application for creating and delivering personalized, connected, and timely customer experiences across any app, device, or channel.

"Most commonly when we talk about a journey, you're trying to find the right person, with the right message, at the right time," says Lewis. "We've taken all these capabilities and put them into one application so you can manage your data to identify who your customer is, and then create the right message to put into a journey."

With Journey Optimizer, you get:

- **Real-time customer insights and engagement.** The integrated profile is the foundation for personalized customer experiences.
- **Modern omnichannel orchestration and execution.** Having a single canvas on which to harmonize the customer journey enables 1:1 customer engagement and marketing outreach.
- **Intelligent decisioning and personalization.** Apply intelligence and gain predictive insights throughout the customer journey.

Enjoy end-to-end scale, speed, and flexibility to meet the expectations of your organization.

## Customer-driven capabilities.

Adobe Journey Optimizer offers ease of use to meet the needs of marketing and IT teams. Its capabilities include:

- Fusing live data from all sources across customer touchpoints—including behavioral, transactional, financial, and operational data—to optimize personal and contextual experiences for customers in real time

- Helping brands deliver more value across the customer lifecycle with journeys designed to be dynamic and event based, and making it possible to connect those interactions with scheduled campaigns so the right decisions can be made about what communications to send

- Surfacing predictive insights throughout the customer experience, making it easier to automate decisions and optimize the experience to power centralized offers across channels at scale

Take a tour

Read the documentation

**Learn more**

## Adobe Experience Cloud

Adobe Experience Cloud is the most comprehensive suite of customer experience management tools on the market. With solutions for data, content delivery, commerce, personalization, and more, this marketing stack is created with the world's first platform designed specifically to create engaging customer experiences. Each product has built-in artificial intelligence and works seamlessly with other Adobe products. And they integrate with your existing technology and future innovations, so you can consistently deliver the right experience every time.

## Adobe Journey Optimizer

Adobe Journey Optimizer manages scheduled omnichannel campaigns and one-to-one moments for millions of customers. It helps brands intelligently determine the next best interaction with scale, speed, and flexibility across the entire customer journey—allowing companies to create and deliver both scheduled marketing campaigns and tailored individual communications all within the same application.