Adobe

CAPABILITY SPOTLIGHT

# Adobe Journey Optimizer — intelligent decisioning at every touchpoint.

Deliver the next-best content, offer, or experience to each customer throughout their journey with your brand.

## Brands are challenged to deliver relevant, personalized experiences to each customer and manage high volume of content while ensuring cohesion across channels.

Providing customers with personalized content and offers has become increasingly complex. Brands are challenged to deliver relevant, personalized experiences to each customer and manage high volumes of content while ensuring cohesion across channels. Generative AI has introduced new ways to create content variations, accelerating velocity and introducing intricate workflows within the content supply chain. Brands need a way to centrally manage, personalize, and optimize content and offers across channels and customer journeys consistently, taking advantage of accelerated content velocity and AI to deliver highly personalized experiences at scale.

Adobe Journey Optimizer's decisioning capabilities empower brands to deliver the next-best content or offer at every touchpoint in the customer journey through the combination of the following elements:

**Real-time customer profile.** A comprehensive and constantly updating view of the customer that unifies data from multiple sources across the enterprise and is the basis for deciding the best experiences to deliver customers.

**Central decision management.** A central location for creating and managing content and offers with a standardized decisioning framework, regardless of channel, audience, or journey.

**Intelligent decisioning.** An open and extensible decision engine that applies business rules, AI and machine learning, and experimentation for eligibility and ranking to determine the next-best content or offer for any individual.

**Comprehensive insights.** Dashboards to view decisioning insights across revenue, engagement, and custom metrics, and to see AI model performance.

**Privacy and trust.** A suite of tools and frameworks to enhance data governance, privacy, and security practices for internal policy and regulatory compliance, as well as for customer preferences.

# Connect the customer identity across channels.

Delivering personalized experiences at scale begins with data strategy. Legacy data governance and disconnected databases result in silos across the organization. Marketers and customer-facing teams lack a central source of truth of the customer's profile and personal journey, resulting in fragmented identities and offers presented with incomplete context. Brands need a way to connect each customer's identity across channels and activate unified customer data to select and deliver more relevant and personal content and offers.

## Single source of truth

Journey Optimizer decisioning relies on the Adobe Experience Platform real-time customer profile as that single source of truth for each customer when determining content or offer eligibility. The real-time customer profile unites all enterprise, customer, and contextual data into a single, holistic customer profile that continually incorporates and updates with customer preferences, behaviors, traits, and contextual data.

## Real-time and batch audiences

The real-time customer profile updates audiences in both batch and real time. The decisioning engine of Journey Optimizer considers audience membership when determining a customer's eligibility based on the rules of an offer or collection of offers. Real-time profile updates enable in-the-moment, data-driven decisioning for greater relevancy and higher engagement.

## A native platform approach

As the decisioning engine delivers each content or offer, the real-time customer profile updates with and records each customer's response. This enables native data governance and workflows to use the most current data that's shared enterprise-wide. It also lets decisions leverage the most up-to-date data to deliver the next-best content and offers with awareness of what the customer has already experienced.

## Cohesive content and offer experience across channels

While the message designer makes it easy to insert content and offers in native channels, the new code-based experience channel or Edge APIs allow for direct decision-making integration into any inbound surface or third-party REST APIs. Marketers and developers to add personalized content and offers to messages that customers can consume in real time across the customer journey. Because the real-time customer profile updates upon content or offer delivery to any channel, consumers enjoy consistent omnichannel experiences across any device or touchpoint.

# Create and manage scalable decision models for content and offers.

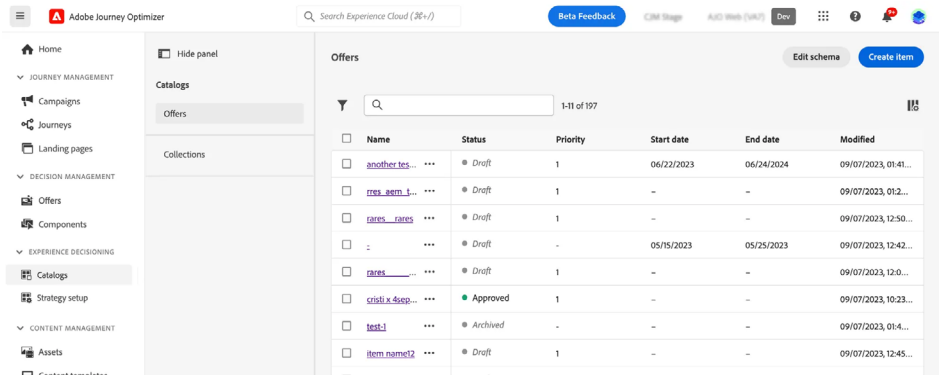
To streamline the deployment of content and offers across channels, brands require a centralized management system that integrates with all marketing and customer-facing tools. Centralized content catalogs and collections for decisioning allow users to create and manage offers and other "decision items" in a single location. This unified library of decision items accelerates time to market and increases operational efficiency, empowering brands to deliver cohesive, personalized customer experiences.

## Adobe Experience Platform XDM framework

The uniform Experience Data Model (XDM) framework and schema-based approach of Adobe Experience Platform uses data, intelligence, and customer context in AI-powered decisioning for audiences, channels, content, and journeys. This approach enables Journey Optimizer to deliver each customer the next-best experience optimizing for business value. Brands create XDM classes to organize data into key categories, such as customer profiles, service interactions, and events. These structured classes serve as foundational elements for building Experience Platform schemas used for Journey Optimizer's decisioning models, detailing specific attributes and relationships within each catalog.

## Content and offer catalogs

Content and offer catalogs provide the central containers for managing and organizing decision items used for real-time personalization across channels. Each catalog links to an XDM schema with attributes that can be modified. Decisioning currently supports string, integer, boolean, date, datetime, and decisioning asset data types within catalogs, with more types being added over time.



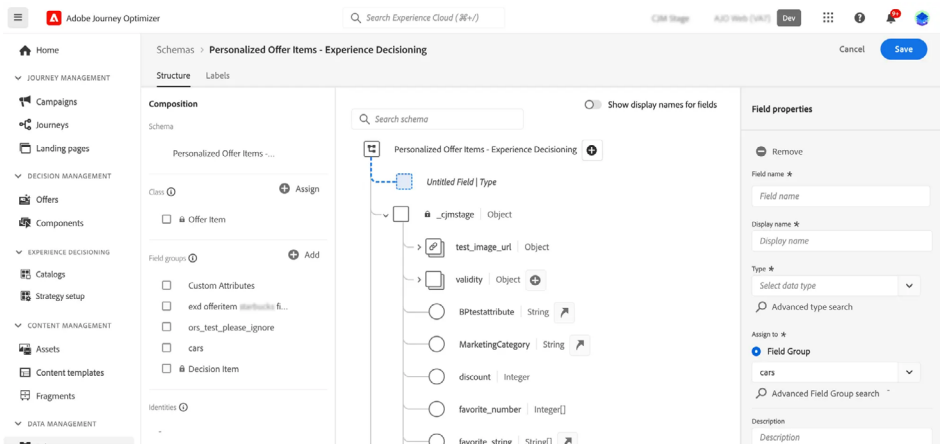

Catalogs let you manage decision items and decision item collections for use in cross-channel personalization.

### What is XDM?

Experience Data Model (XDM) is a standardized framework developed by Adobe to unify and structure customer experience data across applications and services. It provides a common language and schema for robust data management, faster insights, seamless interoperability, and precise personalization with Platform services. As the foundation of Adobe Experience Platform, XDM enables businesses to deliver tailored, timely customer experiences across industries and channels.

### What are XDM schemas?

Experience Data Model (XDM) schemas in Adobe Experience Platform define the structure of data in a consistent and reusable way, ensuring data retains its meaning across systems. By composing schemas with a base class and optional field groups, a business can standardize its data for seamless ingestion, meaningful insights, and enhanced value.



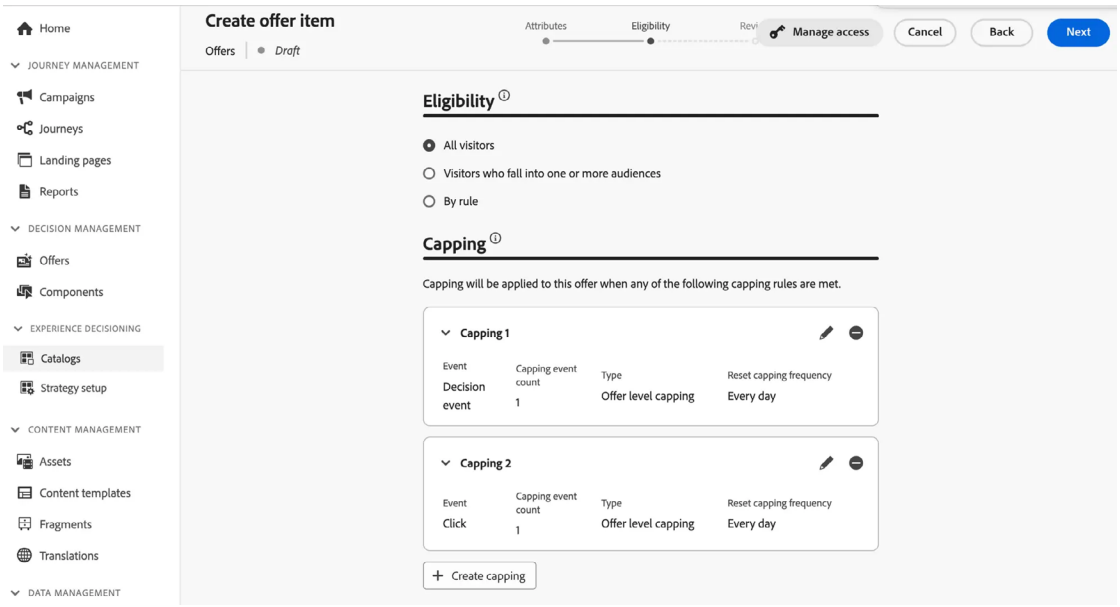

Schemas for decision items can be accessed from a catalog, and attributes associated with a schema can be edited based on business needs.

## Decision items

Decision items are custom content and offers that can be organized in a central catalog and set of collections using standard and custom attributes tailored to specific business needs. As decision items are defined, they can be dynamically grouped into collections based on multiple rules that leverage any of the attributes in a catalog schema. Setting the decision item's priority level lets the decision engine to determine its precedence if multiple items qualify. Unified tags from Adobe Experience Platform categorize and improve searchability for decisioning items.

## Frequency capping

Frequency capping, which can be applied to all visitors or at the audience or profile level, specifies the maximum number of times an offer or content can be presented, displayed on an inbound channel, or clicked. Custom events can also be built and applied — for example, to limit presenting a coupon offer once a profile has redeemed the coupon one time. Customers with profiles that are ineligible for any decision item can receive user-defined alternative offers and content. To optimize touchpoints while maintaining engagement, up to 10 capping rules can be defined per decision item.



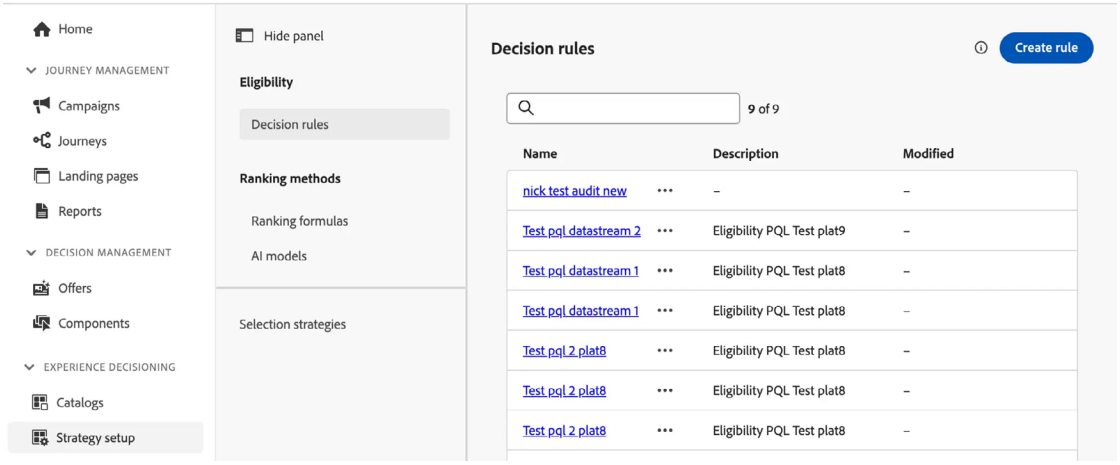

Frequency capping rules prevent customer fatigue by controlling how often customers receive or engage with offer or content decision items across touchpoints.

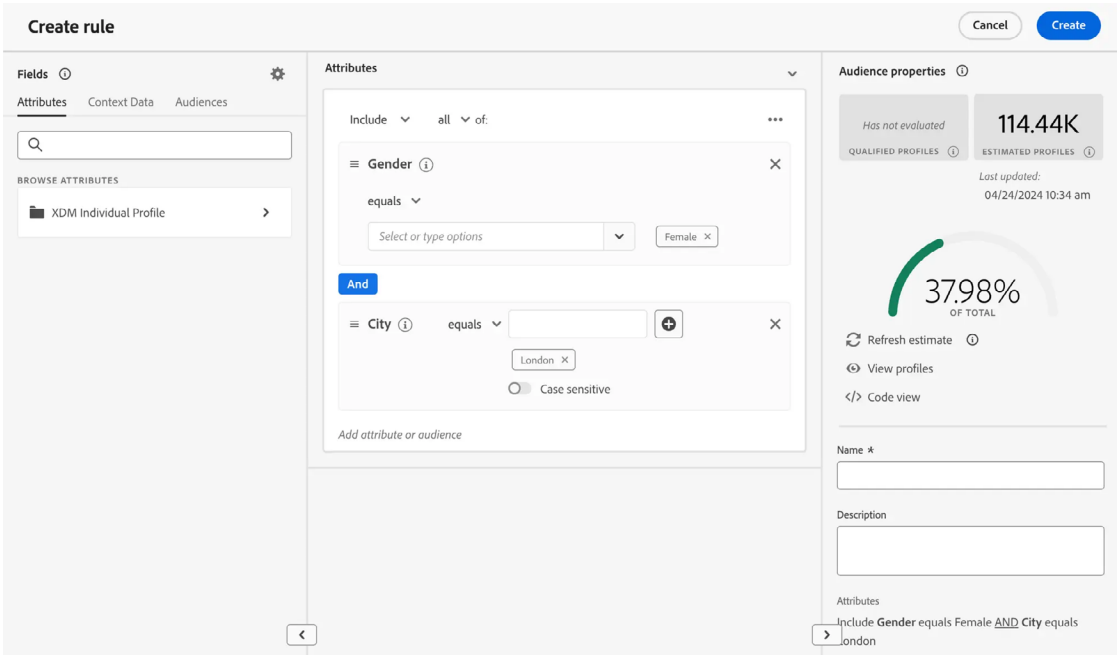
# Ensure delivery of the next-best experience for each customer.

Brands want to determine the best content or offer to present each customer based on the context of the channel, stage of the customer journey, and customer eligibility. This requires the ability to create rules to determine offer eligibility and prioritization. Journey Optimizer decisioning provides a sophisticated, centralized decisioning engine to apply rules, priorities, and constraints while optimizing for business value.

## Eligibility rules

When configuring rules for decision items in Journey Optimizer, defining eligibility decision rules for content or offers ensures each decision item displays as intended to the right individuals across touchpoints and channels. Decision rules define the audience for specific decision items by applying constraints, either directly at the decision item level, or within a specific selection strategy. By default, all profiles are eligible for a decision item. To refine targeting and ensure consistency and alignment with



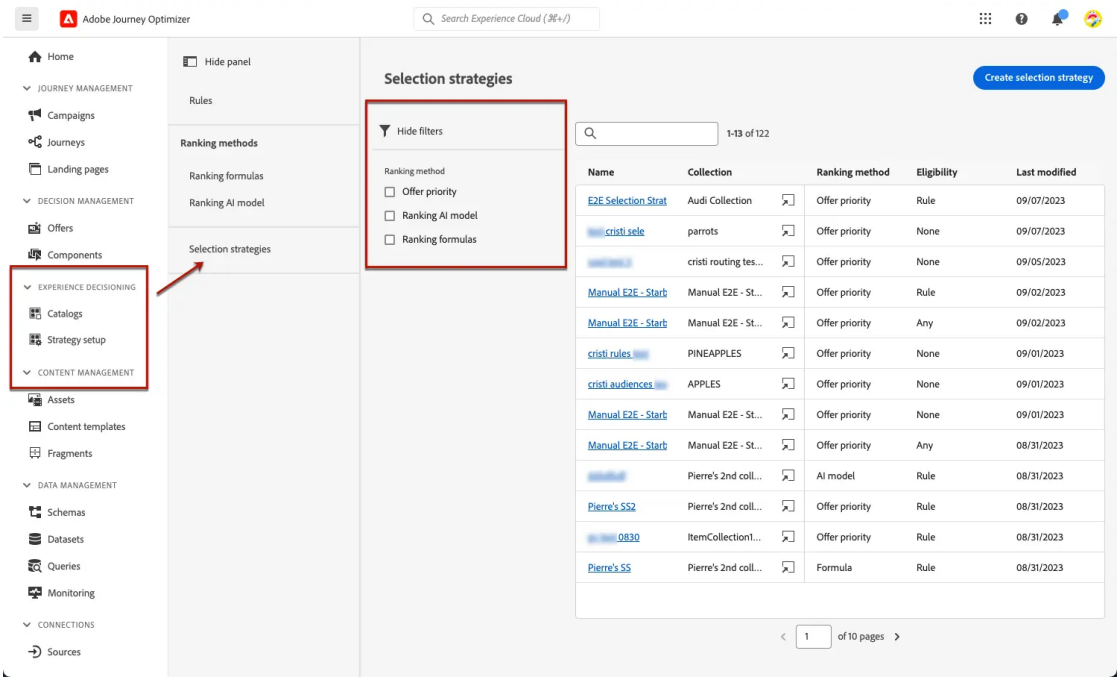




Eligibility decision rules define which profiles are eligible to receive an offer or content decision item, starting with all profiles being eligible, and applying constraints until only the appropriate profiles for the decision item retain eligibility.

decisioning strategies, audiences can be targeted for broader segmentation or detailed rules can be applied for granular control over which profiles qualify for the offer or content.

## Selection strategies and decision policies

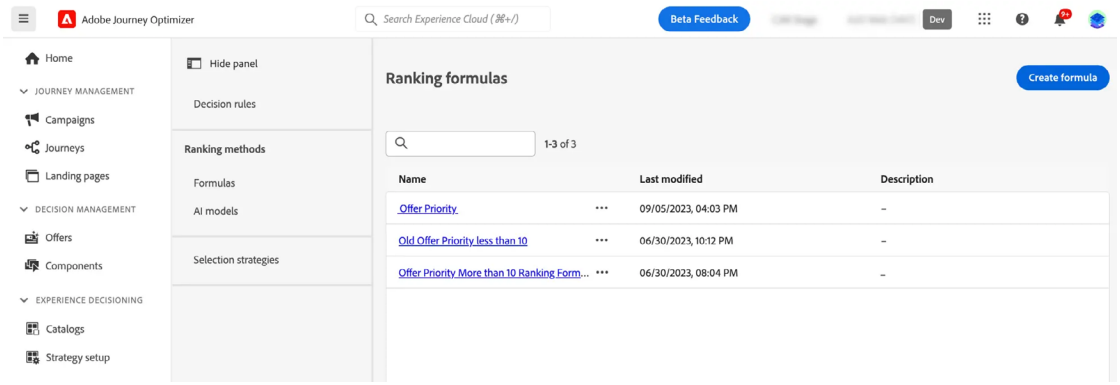
Powerful selection strategy and decision policy frameworks enable power decision item targeting. Selection strategies, which can be reused and sequenced in specific order, are the building blocks for decisioning. They consist of a decision item collection, an eligibility constraint, and a ranking method to determine the best content or offers to be shown when selected in a decision policy. A decision policy contains all of the selection logic the decisioning engine needs to pick the best content and offer for each profile. Users can drag and drop single decision items in sequence and provide multiple fallbacks.




Selection strategies specify the decision items, eligibility rules, and ranking methods to determine the optimal offer or content to deliver to a profile or audience.

## Formula ranking

In addition to manually setting and using offer and content priority scores for decisioning, users can create ranking formulas that determine which offer or content should be presented first. For example, a formula could boost the priority of all offers where the end date is less than 24 hours away. Or, if the profile's area of interest is running, the ranking formula could boost offers from the “running” category.

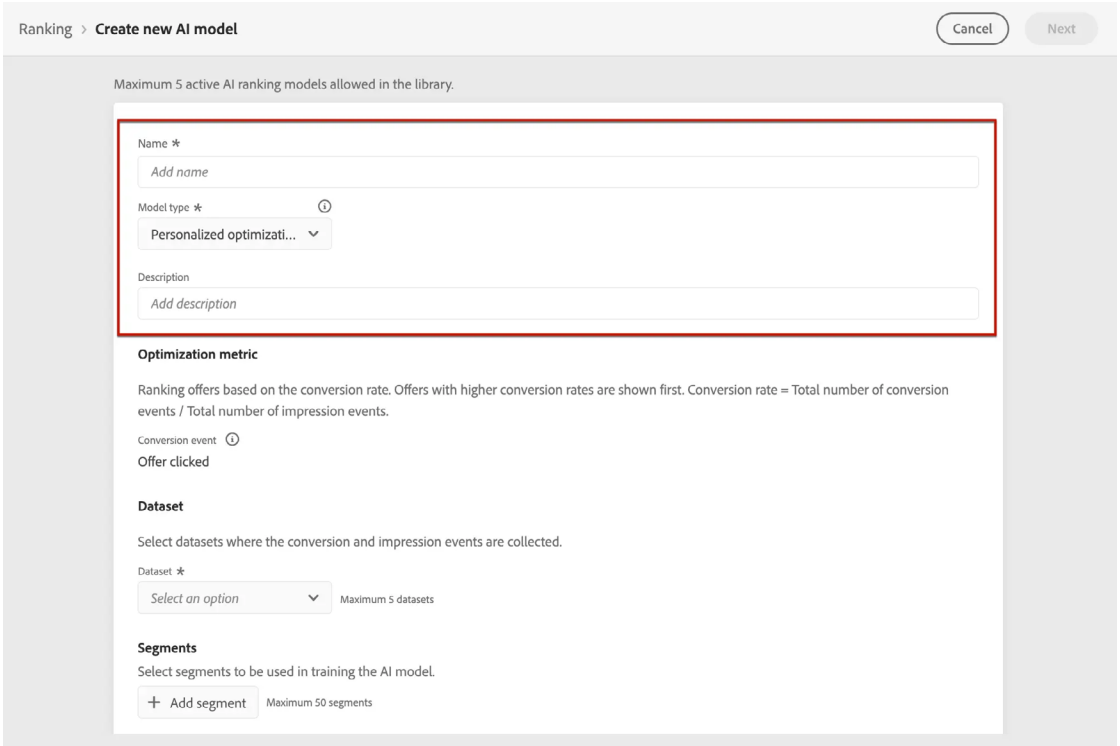



Ranking formulas, which are applied in selection strategies, provide custom decisioning logic that uses a variety of attributes to determine which content or offer to present first.

Ranking formulas provide custom decisioning logic options with loops, counters, and comparisons. They can use profile attributes, context data, and attributes related to decision items. Once created, formulas can be applied within a selection strategy. If multiple offers and content are eligible to be presented when using a selection strategy, decisioning uses the selected formula to calculate which offer to deliver first.

## AI ranking

AI-powered decisioning uses trained models to automatically rank offers tailored to individual profiles. AI models continuously run real-time evaluation and scoring, optimizing any custom business goal metric to deliver the right experience. Once created, AI models can be applied within a selection strategy. If multiple offers are eligible, the model determines which offer should be presented first for the specific selection strategy.




AI models, which can be applied in selection strategies, are trained models optimized for a business metric that automatically rank offers based on a business metric.

Journey Optimizer offers two types of AI models, auto-optimization and personalized optimization models. Auto-optimization models use AI to serve offers that maximize KPIs specified by the business user — for example, conversion rate and revenue — and optimize based on overall performance of the offers or content. With personalized optimization models, the model defines the business goals rather than a user, and customer data is used to train the data to serve the personalized offers and content to maximize those model-defined goals.

Brands can optimize models on Customer Journey Analytics metrics. For example, users can base a personalized optimization model on a custom purchases metric rather than being limited to metrics available in Journey Optimizer. Developer and machine learning teams can select Customer Journey Analytics data views during AI model creation, ensuring alignment with business objectives.

**Brands can optimize models on Customer Journey Analytics metrics.**

## Experimentation at scale

Innovations in AI models and custom propensity scoring drive the need to test the impact of modifying content elements like subject lines, body copy, and imagery, as well as aspects of journeys, including channel mix, length, and time sequences. In addition, visualizing the performance of AI models versus rules-based ranking methods helps identify the best delivery method for offers and content. Journey Optimizer decisioning provides the ability to experiment at scale across thousands of experience variations to help improve ROI and build loyalty by ensuring each individual receives the best content or offer. It does this by bringing together imagery, channel mix, customer preference, and incentives.

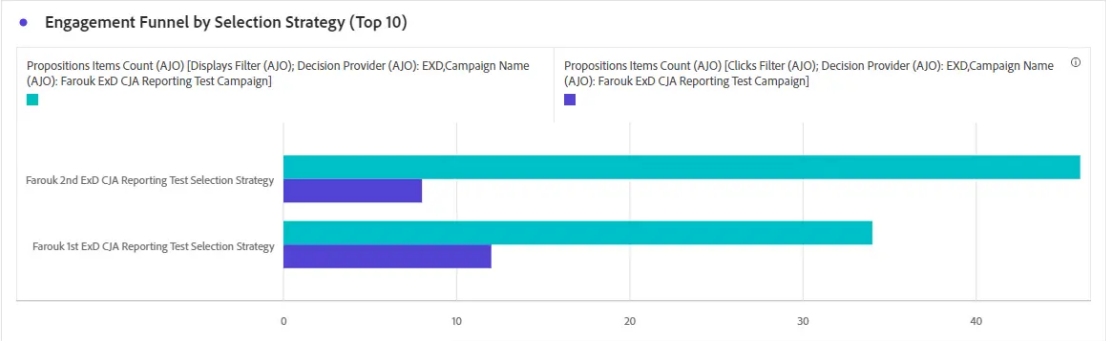
Experimentation within decisioning algorithms reveals the impact of AI models on decisioning and supports quickly testing and validating the highest performing combination of rules, ranking methods, and incentives. Experiments can be added when setting up decision policies within the code-based experience channel to test different ranking formulas, AI models, and selection strategies. For example, an experiment could test an AI auto-optimization versus a ranking formula to reveal the method that drives the most conversions. Or, an experiment could test multiple image attributes in an offer to learn which attribute drives the highest conversion rates. Lift reporting dashboards make it easy to visualize value realization from AI and machine learning ranking models.

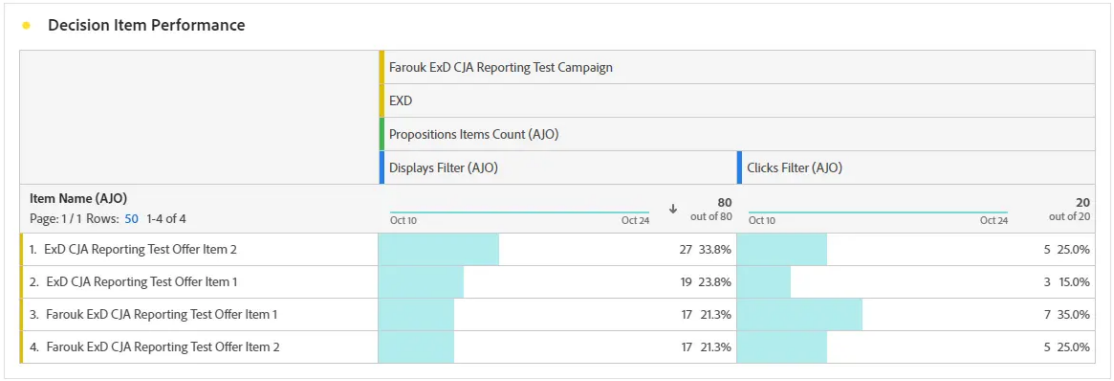
## Visualize impact on engagement and customer lifetime value.

Reporting dashboards and insights transform decisioning data into actionable strategies that drive business success. Decisioning insights empower brands to identify trends, make data-driven decisions, and optimize customer journeys in real time. With intuitive visuals and detailed metrics, users can align selection strategies and decision policies with business goals to enhance the overall impact of offers and content.

## Reporting dashboard and reporting views

An intuitive, out-of-the-box decisioning dashboard quickly shows the value of campaign and journey performance for key KPIs across offer and content delivery, display and click engagement, fallback usage rates, or lift from AI and machine learning ranking models. Marketing as well as product and engineering teams can view campaign and customer journey insights into visitor engagement across all experiences with specific decisioning reporting views of top engagement by selection strategy, performance of decision items, model conversion rates, and more.

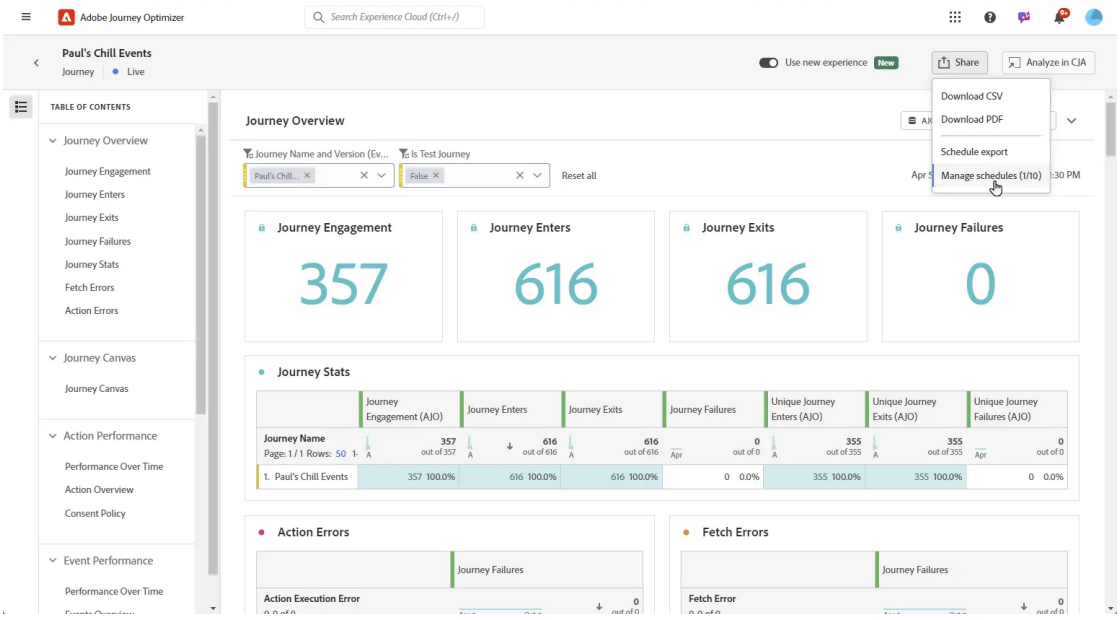


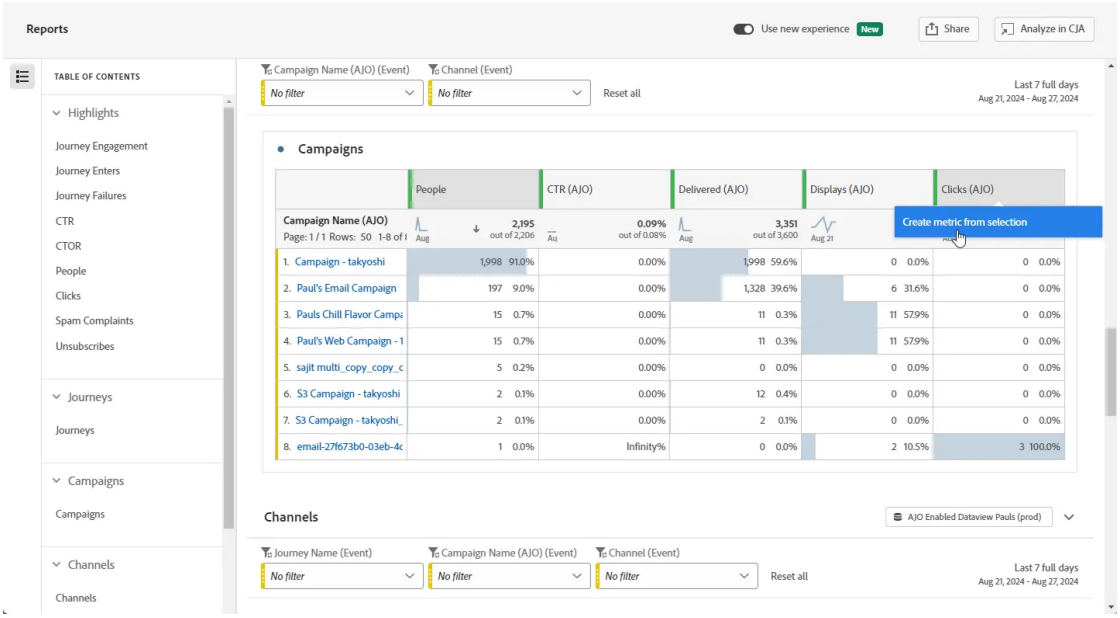

Reporting views provide valuable insights into the performance of important aspects of decisioning, such as selection strategies or decision items.

## Custom optimization metrics

Reporting interoperability with Customer Journey Analytics standardizes reporting across both platforms and improves data consistency and reliability. The seamless integration between Journey Optimizer and Customer Journey Analytics provides a clearer view of performance metrics and adds new capabilities such as the ability to create simple metrics, create and publish audiences, ask ad-hoc questions using Insight Builder, and schedule reports for automatic emailing to specific recipients.




Reporting dashboards enable quick performance analysis and insights across channels, campaigns, and journeys with custom filtering and the ability to schedule reports.




The native integration of Journey Optimizer with Customer Journey Analytics provides deeper insights into campaigns and journeys that can be used to optimize decision items and other aspects of decisioning.

# Empower responsible data use, compliance, and customer trust.

Data governance, privacy and security, and consent management are essential for customer journeys to build trust and ensure compliance with regulatory standards. Consumers expect their data to be handled responsibly, making robust security measures and transparent practices a must.

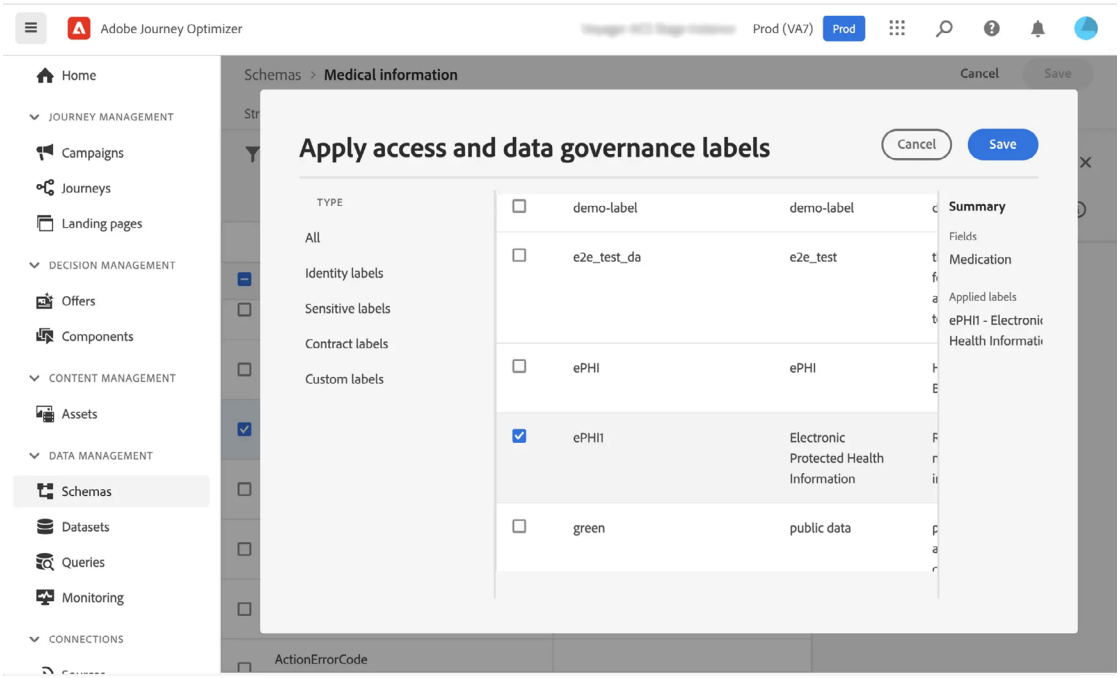
Adobe Experience Platform lets brands to ingest, analyze, optimize, and take action on data to greatly enhance customer experiences. Effective data management and governance ensures that information is accurate, consistent, and used ethically, while privacy safeguards protect sensitive customer data. Prioritizing these core aspects of customer engagement not only mitigates risks, but also enhances brand loyalty and confidence.

## Data governance

The Data Usage Labeling and Enforcement (DULE) framework of Adobe Experience Platform guarantees effective data governance for Journey Optimizer by allowing data analysts and governance teams to label data fields and define marketing actions for specific channels. Labels and actions can be combined within data usage policies — rules that describe which marketing actions are allowed or restricted for performing analysis on data within Adobe Experience Platform — to effectively support data compliance.

Adobe Experience Platform supports data governance policies that restrict data activation based on the marketing action being performed and the data usage labels. For example, a governance policy could restrict sensitive data about electronic protected health information labeled as "ePHI" from being used in email personalization. Experience Platform also supports consent policies that filter the profiles that can be activated to destinations based on each customer's consent or preferences.

Data usage policies can be seamlessly applied to campaigns, journeys, and custom actions, ensuring compliance and ethical data usage across all channels. This approach helps maintain data integrity and regulatory adherence while optimizing customer experiences.




The Data Usage Labeling and Enforcement (DULE) framework enforces data governance across marketing channels by labeling fields and creating marketing actions for each channel.

Healthcare Shield and Privacy and Security Shield — available as add-ons for Adobe Experience Platform application — are designed to provide advanced privacy, governance, and security capabilities. Customer lifecycle optimization with Journey Optimizer focuses on real-time, intelligent decisioning across the entire customer journey. By enabling AI-driven next-best actions and experiences with intuitive personalization controls in any channel or campaign, brands can optimize business goals to increase customer lifetime value and ROI.

# About Adobe Journey Optimizer.

Natively built on the industry-leading Adobe Experience Platform, Adobe Journey Optimizer lets brands to manage scheduled omnichannel campaigns and one-to-one moments for millions of customers in a single, cloud-native application, optimizing the entire customer journey with intelligent decisioning and insights.

## Discover more about the intelligent decisioning capabilities of Adobe Journey Optimizer.

Learn more

Adobe