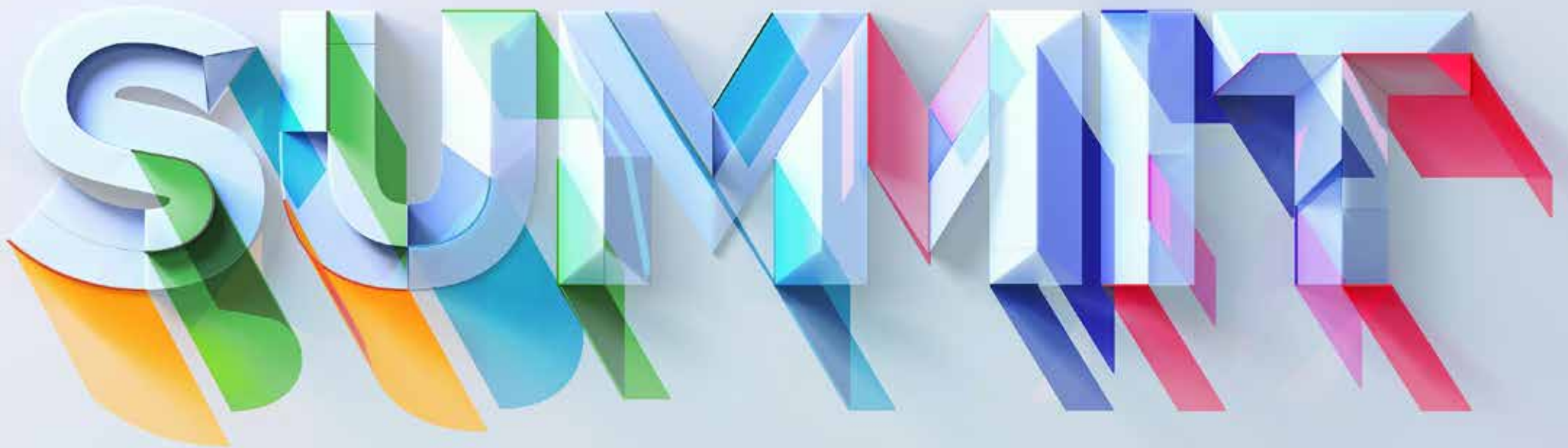




# Follow the Yellow Brick Road: A Guide for a Rock-Solid Analytics Cloud Implementation

Thais Guimarães, Technical Account Manager, Adobe





## About Itaú



**USD88** billion  
in market value <sup>(1)</sup>

**100K**  
employees

**49 million**  
retail customers

**#1**  
most valuable brand in Brazil

**5K** branches  
**48K** ATMs

Traded in NYSE as  
**ITUB**

(1) In December 31<sup>st</sup>, 2018. Source: Economática.

# What we found

## Core Services

- Old libraries
- Missing ECID in some properties

## Analytics

- Dozens of Analytics report suites and several different variable maps
- Poor and inconsistent Marketing Channels rules

## Audience Manager

- No Experience Cloud ID syncs implemented
- Poor Profile Merge Rules usage
- Non-recommended Audience Manager implementation method

Which means:

Possible conflicts, incomplete integrations and missing out on new features.

No holistic channel reporting and hard on business users to adopt the tool.

No cross-device activation capabilities. Missing out on new features and extra burden on their pages.

# 1

Libraries are the heart of the Experience Cloud. Create a process to keep them updated.

# 2

Experience Cloud's got brains. Know which features can do the hard work for you, and just set them & forget them.

# 3

Consider having the courage to migrate your Analytics implementation to a global report suite.









THE HEART

# Keep your libraries updated

ECID

Current  
version:  
**4.0**

Analytics

Current  
version:  
**2.11.0**

AAM

Current  
version:  
**9.1**

ECID

Itaú's versions:  
As low as 1.5.2

Analytics

Itaú's versions:  
As low as 1.4.3

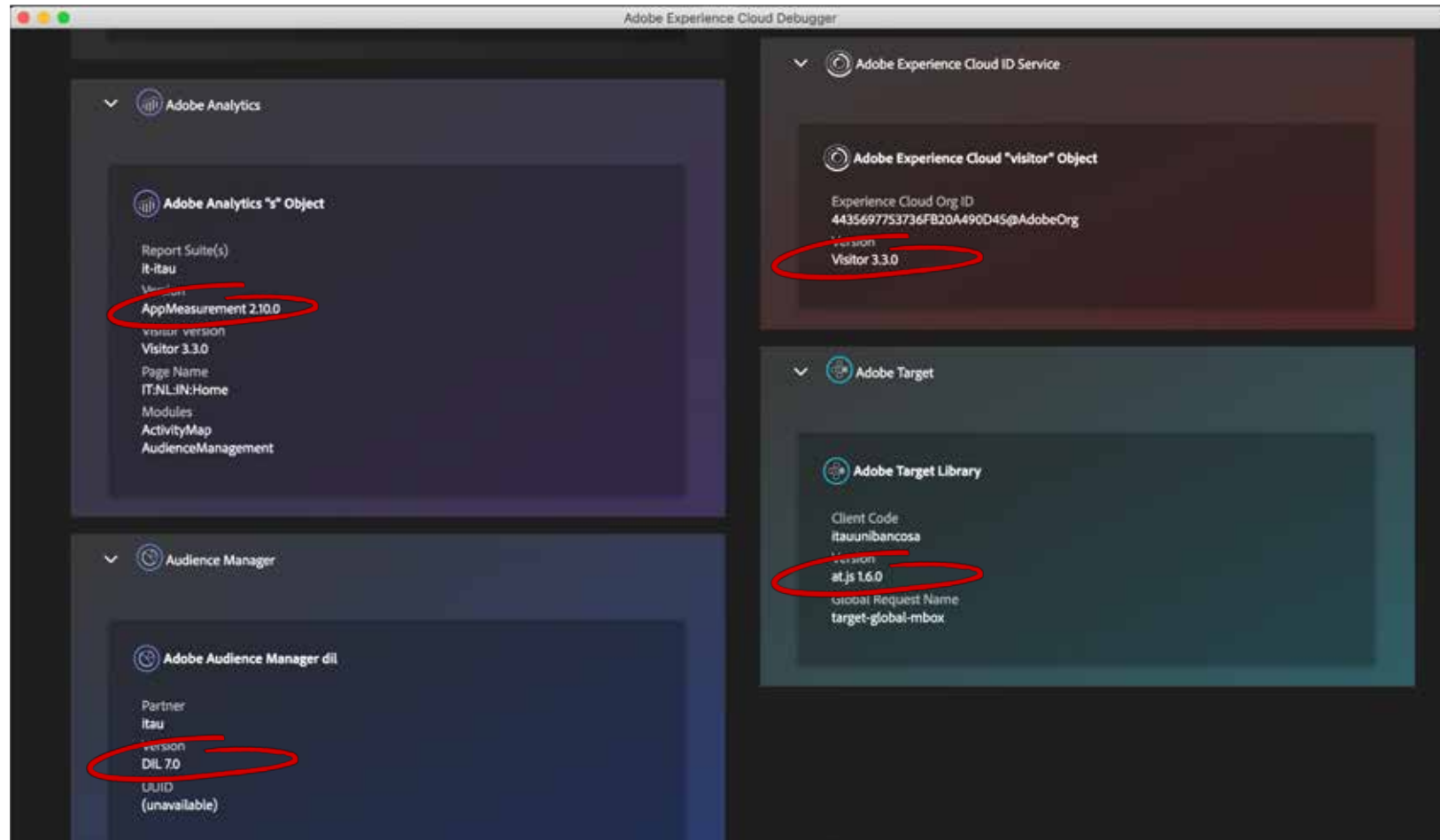
AAM

Itaú's versions:  
As low as 6.9

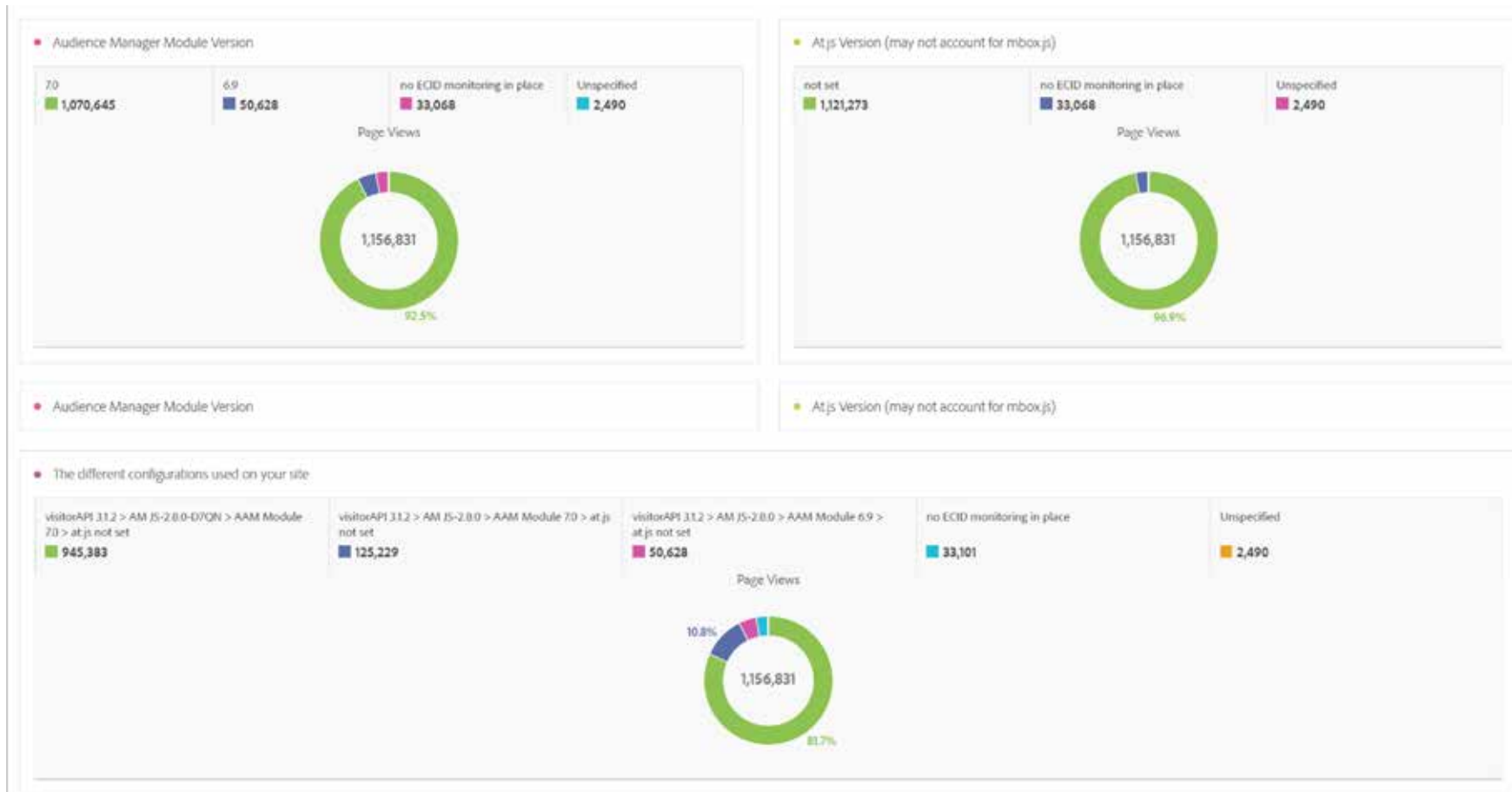
- Old libraries:
  - Keep you from taking advantage of new features
  - May have compatibility issues
    - i.e. DIL code 8.0+ **REQUIRES** Visitor ID 3.3.0+
- Monitor your code versions:
  - Use the Experience Cloud Debugger to check your library versions
  - Pass your library versions into an eVar and report on them in Analysis Workspace



# Monitor your code versions in the Experience Cloud Debugger



Or put it on an eVar and track them in Analysis Workspace





**WE'RE NOT IN ~~KANSAS~~ ANYMORE**

Launch will notify you of all library updates – all you have to do is add the library upgrade to your build when it shows up and you're all set!

# Managing code versions in Launch

The screenshot displays three extension cards in the Adobe Launch interface. Each card includes an icon, a title, a version number, a description, and a set of action buttons. The 'Upgrade' button on each card is highlighted with a red circle.

- Adobe Analytics**  
Adobe Systems · v1.4.0  
Adobe Analytics is an industry-leading solution that empowers you to understand your customers as people and steer your business with customer intelligence. This extension deploys with AppMeasurement version 2.9.0.  
Buttons: Upgrade, Configure, v
- Adobe Target**  
Adobe Systems · v0.8.1  
Adobe Target Launch extension (at.js v1.6.2)  
Buttons: Upgrade, Configure, v
- Core**  
Adobe Systems · v1.2.0  
Provides default event, condition, and data element types available to all Launch users.  
Buttons: Upgrade, Configure, v

## The Heart - Take Aways



- Make sure you have ECID in all your properties
- Create a process to keep your libraries updated
- Plan your migration to Launch







# THE BRAIN

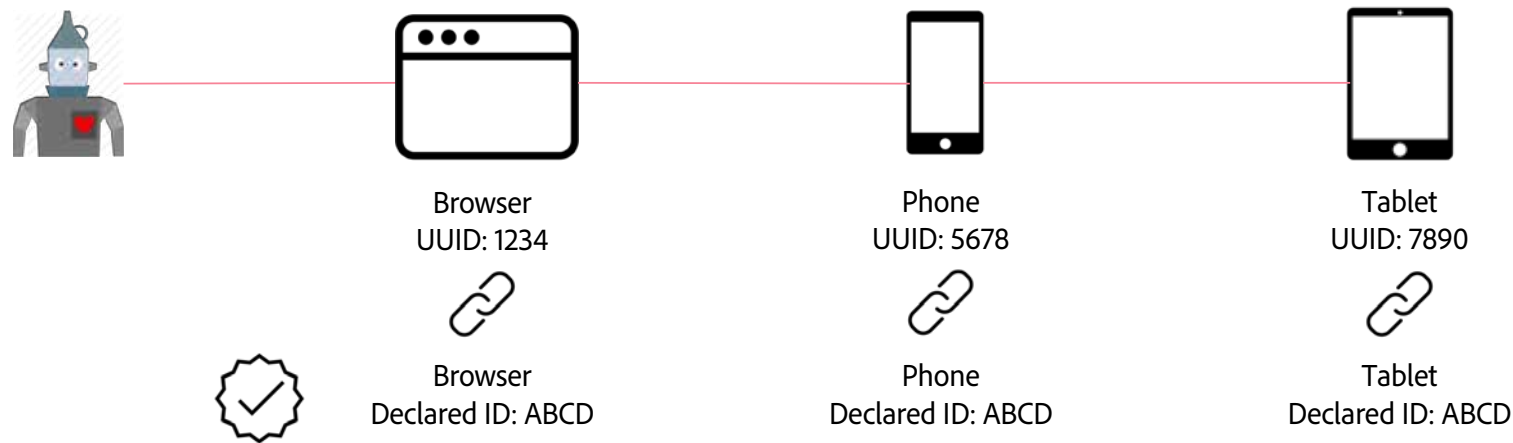
# Attribution

- All 10 attribution models in Workspace can be used with any eVar
  - Use cases: internal banners, search keywords, days of the week, etc
- Marketing channels are the most common use case
  - Marketing Channel reports combine paid and organic traffic into one channel report for all incoming traffic
  - Channel rule criteria is customizable, and can take into consideration tracking codes, search engines, referring domains, entry pages, and other visit elements
  - Processing rules are applied to all incoming traffic and follow a "waterfall" order



Marketing Channel	Clicks em warning (x229)	Clicks em warning (x229)	Clicks em warning (x229)
1. App Desktop	1000000 44.3%	1000000 44.3%	1000000 44.3%
2. Direct	100000 16.5%	100000 16.8%	100000 17.0%
3. Organic Search	400000 15.0%	400000 15.3%	400000 16.0%
4. None	500000 13.8%	500000 13.8%	500000 13.8%
5. Session Refresh	100000 4.7%	100000 5.0%	100000 5.7%
6. Paid Search	100000 2.7%	100000 2.8%	100000 2.8%
7. Other campaigns	10000 0.8%	10000 0.7%	100000 2.8%
8. Other Domains	10000 0.8%	10000 0.7%	10000 1.3%
9. Partners	10000 0.2%	1000 0.2%	1000 0.2%
10. Google Display Network	1000 0.0%	1000 0.2%	10000 0.3%

# Experience Cloud ID Syncing



- Experience Cloud ID syncing is used to allow for cross device user identification in Audience Manager
- It is also required in order to upload offline CRM data into Customer Attributes, in order to use this data in Analytics and Target
- **Pro tip:** you cannot use the same integration code for Audience Manager and Customer Attributes – you will need to create one integration code for you AAM data source and another one (called alias ID) for your CA implementation and declare the same ID twice under different integration codes

## Brain Take Aways



- Make sure your Marketing Channels rules are properly configured and that they reflect all channels in your organization
- Implement Experience Cloud ID syncing both for Audience Manager and Customer Attributes





An abstract graphic on the left side of the image. It features a complex, glowing blue wireframe structure that resembles a stylized, elongated object or a network of interconnected points. The structure is composed of numerous small, bright blue dots connected by thin, glowing lines, creating a mesh-like appearance. The overall shape is somewhat elongated and tapers towards the right. The background is a dark blue gradient, and there are faint, larger-scale geometric patterns visible in the lower-left corner.

THE COURAGE

# Global Report Suite – Why make the move?

- Flows between sites and apps
- Segments that combine web and app usage
- Single variable map (easier on end users, great for increasing tool adoption, less whining)
- Flexibility to analyze different BUs/channel's data differently:
  - You can still see each property separately using Virtual Report Suites
  - You can redefine each property's visit definitions retroactively in Virtual Report Suites without changing the original data
  - You can apply different attribution models and lookback windows for different businesses with Attribution IQ
- You will only get full value out of new roadmap features with a global report suite
  - **Bottom line: you don't want to be left behind!**

# How Global Does a Global Report Suite Have to Be?



	Country specific	Country specific
LOBs	Retail Small Business Credit Cards Loans Mortgages	Retail Small Business Credit Cards Loans Mortgages
Channels	Self Service channels: <ul style="list-style-type: none"><li>• Web</li><li>• Apps</li><li>• ATMs</li></ul>	Assisted channels: <ul style="list-style-type: none"><li>• Call center</li><li>• Tellers</li></ul>

## Got Pain Points?

1

I don't know which variable to use

2

I need to know the variable map by heart to pull a report

3

I need my own report suite to be able to control my business rules in reports

4

I can't mix data from different report suites in Analysis Workspace



# Got Pain Points?

1

I don't know which variable to use

2

I need to know the variable map by heart to pull a report

3

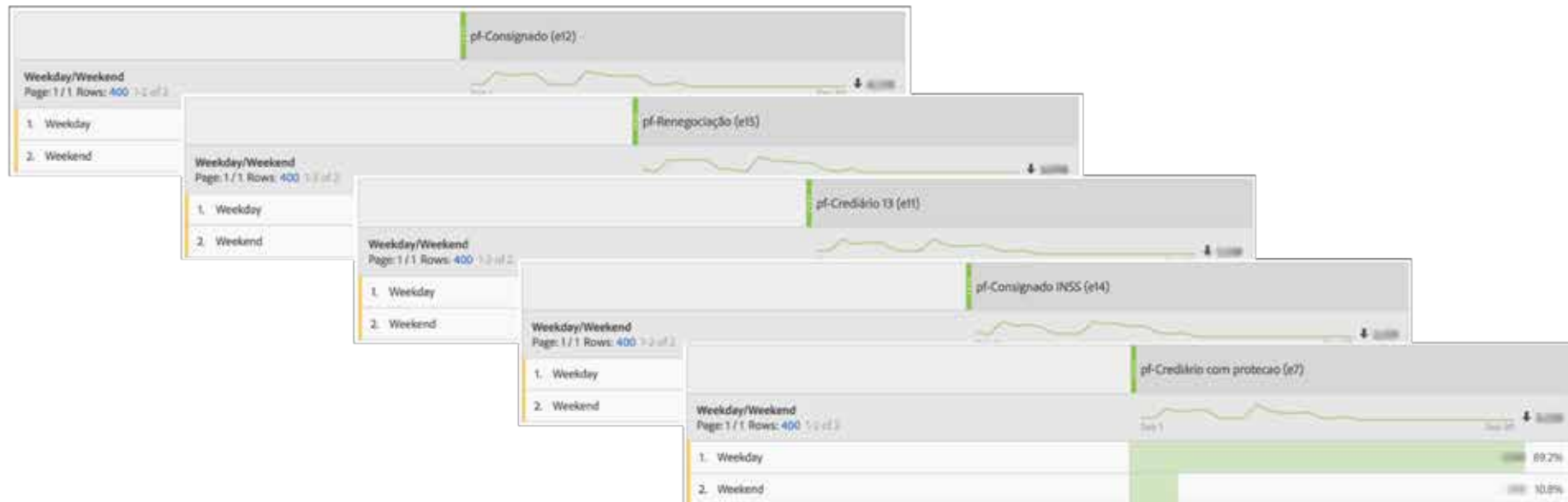
I need my own report suite to be able to control my business rules in reports

4

I can't mix data from different report suites in Analysis Workspace

# #1 I don't know which variable to use

- Itaú used to have one event for every single product transaction and for every step of each funnel.
- Seeing all the products or comparing them in a report would take multiple tables or a table with several columns.



## #1 I don't know which variable to use

- With a single generic Transaction event and the products on an eVar, you can compare all products on a single table that is comfortable to read.



## Got Pain Points?

1

I don't know which variable to use

2

I need to know the variable map by heart to pull a report

3

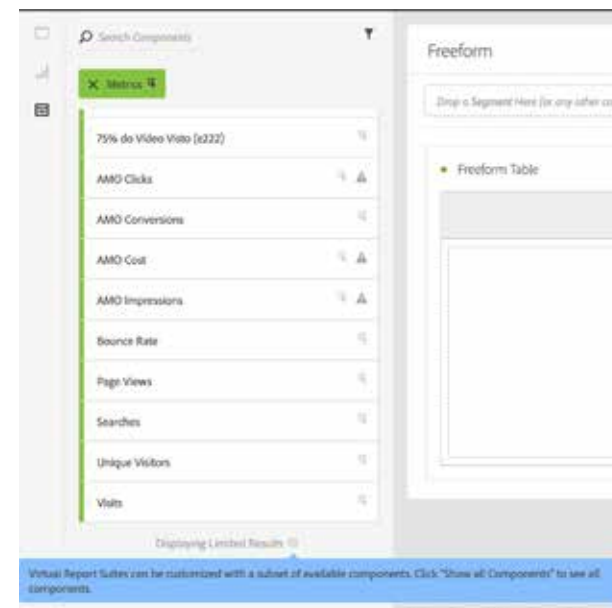
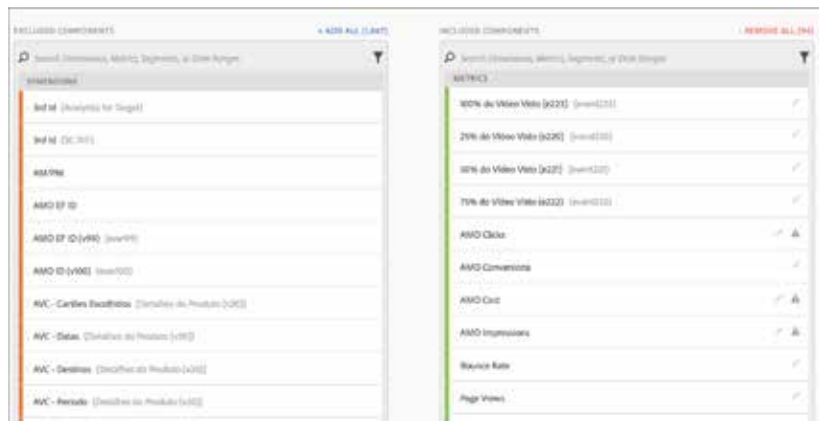
I need my own report suite to be able to control my business rules in reports

4

I can't mix data from different report suites in Analysis Workspace

## #3 I need to know the variable map by heart to pull a report

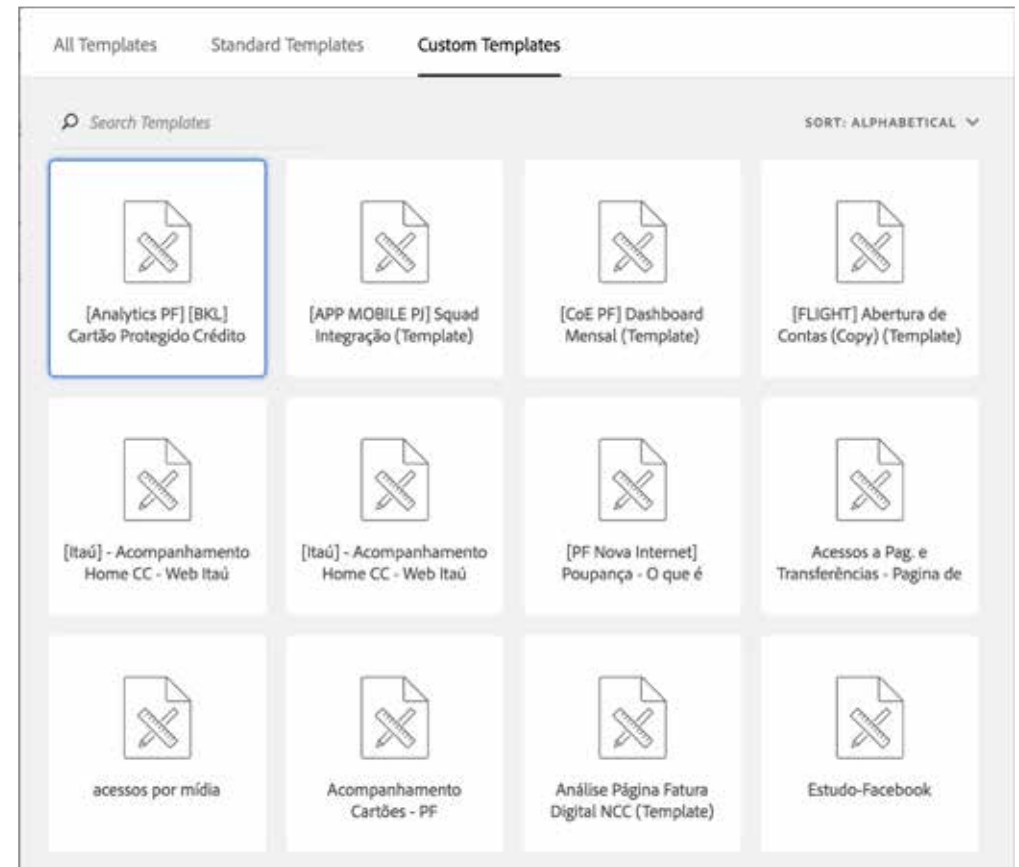
- Create curated Virtual Report Suites and add only the metrics and dimensions that are relevant to a specific business unit
- In one particular case, we reduced the number of menu items in 90%, making the list of variables a lot less overwhelming





## #3 I need to know the variable map by heart to pull a report

- You can create custom project templates to share with your business teams to get them started on their projects without a blank canvas



# Got Pain Points?

1

I don't know which variable to use

2

I need to know the variable map by heart to pull a report

3

I need my own report suite to be able to control my business rules in reports

4

I can't mix data from different report suites in Analysis Workspace

## #4 I need my own report suite to be able to control my business rules in reports

- With all business units under a global report suite, on a virtual report suite, they are still able to control:
  - How they want to name their metrics and dimensions in reporting
  - Which metrics and dimensions to show up in reporting
  - What is their visit definition (i.e. 10 minutes of inactivity instead of 30 minutes)
  - What attribution model they want to use in each report
- Without ever changing their original underlying data

## #4 I need my own report suite to be able to control my business rules in reports

### Real life use case of context aware sessions

Remember, a visit ends after:

- 30 minutes of inactivity
- 12 hours of continuous activity
- 2500 hits
- 100 hits in 100 seconds

**Use case:** branch teller making transactions all day long on behalf of customers

Visit definition on branch teller virtual report suite: User authentication on teller terminal

# Got Pain Points?

1

I don't know which variable to use

2

I need to know the variable map by heart to pull a report

3

I need my own report suite to be able to control my business rules in reports

4

I can't mix data from different report suites in Analysis Workspace



# Global Report Suite Caveats

- Features not available in Virtual Report Suites:
  - Segment sharing to the Experience Cloud
  - Real time reports
  - Data Feeds
- Low traffic limits will be applied on the Global Report Suite level
- Variable limits
- Some Data Connectors only allow one partner account per report suite

If these are issues, it's better to have multi-suite tagging than to have separate report suites for each property.





A photograph showing a vibrant green lawn on the left and a yellow stone path on the right. The path is composed of rectangular stones with dark mortar lines. The word "Ready?" is written in white, sans-serif font across the lawn area.

Ready?



# Migration Steps – Report Suite Configuration

- 1 Pick your global report suite
- 2 Set your report suite to timestamp optional
- 3 Review your internal URL filters
- 4 Review your paid search detection rules
- 5 Review your marketing channels rules
- 6 Create your virtual report suites

Choose a report suite that has the most data and bring other report suite's data into it

OR

Start from a brand new report suite from scratch

Consider:

- How much of your data sits in any individual report suite
- Whether you have an optimal variable map in any of your report suites that is worth keeping
- How you want to handle historic data

# Migration Steps – Report Suite Configuration

1

Pick your global report suite

2

Set your report suite to timestamp optional

3

Review your internal URL filters

4

Review your paid search detection rules

5

Review your marketing channels rules

6

Create your virtual report suites

Report suites that have web and mobile data need to be configured as 'timestamp optional', so you can collect offline mobile hits that arrive at a later date and time.

This is a setting under Admin > Report Suites > General > Timestamp configuration

The screenshot shows the 'Report Suite Manager' interface. At the top, it says 'Selected Report Suites' with '1 of 103 selected' and an 'Expand' link. There is an 'Edit Settings' button with a dropdown arrow. Below this is the 'Timestamp Configuration' section. It states 'Current timestamp setting on selected report suites: Timestamps required (setting visitorID not supported)'. A warning message follows: 'Warning: Do not use the Timestamps Optional setting if you are explicitly setting a custom visitor ID (s.visitorID) on timestamped hits, as this can lead to out-of-order data. Once you change the setting to Timestamps Optional, you cannot change it back without assistance from Customer Care. In most cases you will have no need to revert this setting to its previous state.' Below the warning is a checkbox labeled 'Convert selected report suites to timestamps Optional' with a help icon. At the bottom is a blue 'Save' button.

# Migration Steps – Report Suite Configuration

1

Pick your global report suite

2

Set your report suite to timestamp optional

3

Review your internal URL filters

4

Review your paid search detection rules

5

Review your marketing channels rules

6

Create your virtual report suites

Configure this to avoid having internal domains being treated as referring domains by Adobe Analytics

When you bring together data from different properties into a single report suite, remember to account for all possible domains that live within the global report suite in the internal URL filters.

This is a setting under Admin > Report Suites > General > Internal URL Filters

The screenshot shows the 'Report Suite Manager' interface. Under the 'Internal URL Filters' section, there is a text area for configuring filters. Below this, there is an 'Add Filter' section with an input field and an 'Add' button. At the bottom, there is a table titled 'Current Filters' with columns for 'Filter' and 'Applies to'. The table contains two entries: 'www2.kau.com.br' and 'kau.com.br', both of which apply to '1 Report Suite'.

Filter	Applies to
www2.kau.com.br	1 Report Suite
kau.com.br	1 Report Suite

# Migration Steps – Report Suite Configuration

1

Pick your global report suite

2

Set your report suite to timestamp optional

3

Review your internal URL filters

4

Review your paid search detection rules

5

Review your marketing channels rules

6

Create your virtual report suites

Configure this to populate paid search and natural search reports.

When you bring together data from different properties into a single report suite, remember to account for paid search parameters from all different products/BUs.

This is a setting under Admin > Report Suites > General > Paid Search Detection

The screenshot shows the 'Report Suite Manager' interface. At the top, it says 'Selected Report Suite: 1 of 103 selected' and 'Edit Settings'. The main section is titled 'Paid Search Detection'. Below this, there is a paragraph explaining that rules are used to populate reports for Paid Search Engines, Paid Search Keywords, Natural Search Engines, and Natural Search Keywords. It also mentions that once a rule is created, all search engines and keywords are designated as either paid or natural. A note states that if a page view meets the criteria for any rule, a paid search will be counted. Below this is a section 'Classify a Search Engine / Keyword as a paid search' with a form to create a new rule. The form has fields for 'Search Engine' (set to 'Any'), 'Query string' (set to 'contains'), and a value field. There is an 'Add' button. Below the form is a table titled 'Current Paid Search Detection Rules'.

Search Engine	Rule	Value	Applies to
Any	contains	q=	Report Suite
Any	contains	q=	Report Suite
Any	contains	q=	Report Suite
Any	contains	q=	Report Suite



# Migration Steps – Report Suite Configuration

- 1 Pick your global report suite
- 2 Set your report suite to timestamp optional
- 3 Review your internal URL filters
- 4 Review your paid search detection rules
- 5 Review your marketing channels rules
- 6 Create your virtual report suites

Configure this to populate your Marketing Channels reports.

When you bring together data from different properties into a single report suite, make sure your rules account for all your channels from all your properties, products and BUs.

This is a setting under Admin > Report Suites > Marketing Channels > Marketing Channel Processing Rules

**Pro tip:**

Add mobile rules using data from your Branch/Appsflyer/Adjust data connector variables

# Migration Steps – Report Suite Configuration

- 1 Pick your global report suite
- 2 Set your report suite to timestamp optional
- 3 Review your internal URL filters
- 4 Review your paid search detection rules
- 5 Review your marketing channels rules
- 6 Create your virtual report suites

Create and curate Virtual Report Suites for each business unit and/or channel.

## Pro tips:

- Make sure you have an eVar or prop that is set at EVERY hit that identifies your channels so you can create VRSs out of it.
- Use the VRSs to set up your apps in Mobile Services UI – that avoids accidentally blacklisting users in push notifications because of broad segment definitions

# Migration Steps – Implementation process



## The problem:

- Businesses were allowed for a long time to work independently in their implementation
- Different variable maps across business units and across devices

## The solution:

- What business questions are being answered with each variable?
- Keep only what brings your joy!
- Think big
- Make sure variables align across all properties
- Use classifications to group similar variables and then split them up into reporting
- Make sure your data layer accounts for all your defined variables

# Migration Steps – Implementation process



## Reality check:

- Itaú wished they had a global variable map from the start
- You will have several versions before it's final
- There are **a lot** of variables that you probably don't use and are not relevant
- It was harder to come up with variable names than they thought
- It's never-ending work

## Enhancements over old variable maps:

- Standardized naming convention to English
- Same #s for props and eVars (i.e. prop25 = eVar25)
- Detailed description of variables – what does it mean, where is it collecting data from, when to use it, what to combine it with

## New Global Variable Map

# Demo

# Internal Wiki Pages

The screenshot shows a Confluence Wiki page for 'Solution Design Global (SD)'. The left sidebar contains a navigation menu with various links, including 'eVar0 e eVar56 - Campaign Variables', 'eVar1 e eVar2 - Website URL e Page ID', 'eVar02 e List02- Warning Clicked e Warnings', 'eVar3 - Pagename', 'eVar4 - Error Name', 'eVar6 - Whatever Variable', 'eVar9 e eVar10 - Transactions e Transaction Details', 'eVar13 - Customer ID PF', 'eVar14 e eVar15 - Customer ID PJ-Company/Operator', 'eVar17 - Customer Details', 'eVar24 - Search Term', 'eVar25 - Device Token (TBD)', 'eVar41 - CustomerIDPF', 'eVar67 - Video Info', 'eVar72 - Days Since Last Visit', 'eVar73 - New vs. Returning Visits', 'modelo layout', 'prop74 - Survey Response', 'Toolkit de Tagueamento Adobe', 'Tutoriais e Guias\_', 'Nossos PEVs\_', 'Nossos Indicadores\_', 'Nossos Reports\_', 'Restropectivas\_', 'teste de video', and 'Ferramentas JIX'. The main content area has a title 'Solution Design Global (SD)' and a subtitle 'Criado por Alex Lemos Silva, última alteração por Bruna Sa Tavares em nov 01, 2018'. Below the title is a paragraph: 'Esse material introdutório de apoio para o Solution Design, dúvidas mais específicas em relação aos conceitos podem ser sanadas com o nosso time.' followed by a link 'Arquivo do Solution Design'. There are two sections: 'Índice Rápido\_' with links 'O que é o SD Global?', 'Lista de Evars no SD', 'Como leio o SD Global?', and 'Referências'; and 'Lista de Evars no SD' with two sub-sections: 'Mídia' (listing 'Internal tracking code (v1)', 'Warning Clicked (v2)', 'Website URL/ Page ID (v3)', 'Video Info (v4)', 'Scroll (v5)', 'Partner Parameter (v6)', and 'Application ID - Partners (v7)') and 'Gerais' (listing 'Pagename (v11)', 'Days Since Last Visit (v12)', 'Error Name (v13)', 'Custom Location (v14)', 'Channel Detail(v15)', 'Channel (v16)', 'New vs. Returning Visits (v17)', 'Previous Page (v18)', 'Dynamic Component Clicks (v60)', 'Dynamic Component Impressions (v63)', and 'Code Version (v21)').

Confluence Itau | Espaços | Utilizadores | Questões | Calendários | Criar | ...

Páginas / ... / Padrões e Documentos\_ | Editar | Salvar para mais tarde | Acompanhando

## Solution Design Global (SD)

Criado por Alex Lemos Silva, última alteração por Bruna Sa Tavares em nov 01, 2018

Esse material introdutório de apoio para o Solution Design, dúvidas mais específicas em relação aos conceitos podem ser sanadas com o nosso time.

Arquivo do Solution Design

### Índice Rápido\_

- O que é o SD Global?
- Lista de Evars no SD
- Como leio o SD Global?
- Referências

### Lista de Evars no SD

- Mídia
  - Internal tracking code (v1)
  - Warning Clicked (v2)
  - Website URL/ Page ID (v3)
  - Video Info (v4)
  - Scroll (v5)
  - Partner Parameter (v6)
  - Application ID - Partners (v7)
- Gerais
  - Pagename (v11)
  - Days Since Last Visit (v12)
  - Error Name (v13)
  - Custom Location (v14)
  - Channel Detail(v15)
  - Channel (v16)
  - New vs. Returning Visits (v17)
  - Previous Page (v18)
  - Dynamic Component Clicks (v60)
  - Dynamic Component Impressions (v63)
  - Code Version (v21)



# Internal Wiki Pages

The screenshot shows a Confluence Wiki page for 'eVar4 - Error Name' within the 'Solution Design Global (SD)' space. The left sidebar contains a navigation menu with various eVar categories. The main content area is divided into sections: 'O que é?' (What is it?), 'Exemplos de Uso' (Examples of Use), and 'Configurações das variáveis no Adobe Analytics' (Analytics variable configurations).

**O que é?**

A evar Error Name foi concebida com o intuito de captar quando acontece um erro durante a jornada do cliente e qual o seu tipo. Para isso, a evar envia a mensagem de texto contida no erro.

**Exemplos de Uso**

1 Exemplo de relatório que pode ser gerado: Top 5 erros no IOS

The example shows a report titled 'Error Name (v4) Instances' for 'Apple iOS'. It includes a bar chart and a table of the top 5 errors.

Rank	Error Message	Instances	Percentage
1	'Seu acesso expirou. Identifique-se novamente para continuar.'	940,665	30.6%
2	'Você está sem conexão com a internet! Verifique a conexão do seu celular e tente acessar novamente.'	1,206,248	23.4%
3	'Ops! Desculpe-nos. Estamos melhorando nossos serviços. Tente novamente mais tarde.'	768,342	10.5%
4	'Erro ao processar a solicitação.'	281,023	4.0%
5	'A senha digitada está incorreta. Sua senha eletrônica é aquela que você usa nos canais digitais do Itaú.'	233,034	3.7%

**Configurações das variáveis no Adobe Analytics**

- eVar 4 (v4)
  - Nome: Error Name
  - Alocação: Most Recent (Last)
  - Expira: Visita

# Migration Steps – Implementation process

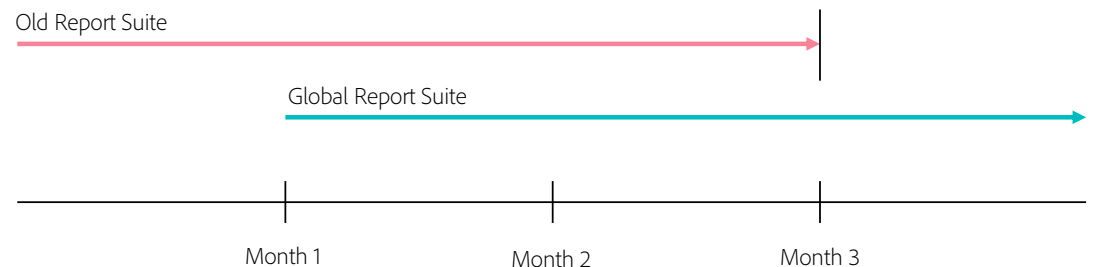


## The problem:

- Some of the data required for the new variable map wasn't yet available to be collected
- Historical data would be stored in different variables
- Suddenly change of variable map for business users

## The solution:

- Review of data layer to account for all the required data
- New Launch property to map global variables to props/eVars/events
- Temporary multi-suite tagging



# Migration Steps – Implementation process



## Reality check:

- Started migration to global report suite before variable map was finished – that was throw away work
- Implementation was much easier than creating a global variable map
- The business users will complain, but they will realize the value

# The Courage - Take Aways



- Check your business users' pain points on a regular basis – there may be features available today to help them out
- Keep an eye on our release notes – there is new stuff coming out every month!
- A global variable map is the best possible solution to drive adoption and hassle-free usage of Analytics
- Tidy up your variables
- Consider migrating to a global report suite to maximize value out of Analytics in the long run



# Arriving in Emerald City

Number of variables



	Before (considering only 1 of the 64 report suites)	After	% change
Events	331	58	▼ 82%
eVars (only because they couldn't have more)	100	52	▼ 48%
Props	52	28	▼ 46%

- Classifications are magic!
- Internal committee has been established to request changes to the variable map
- Reducing the number of variables and aligning variables across all properties will help Itaú go through the GDPR process more smoothly



# GDPR Labelling Made Easy

Report Suites > APP - AbreConta - Data Governance

[Copy to Report Suite\(s\)](#) [Close](#)

Standard Dimensions

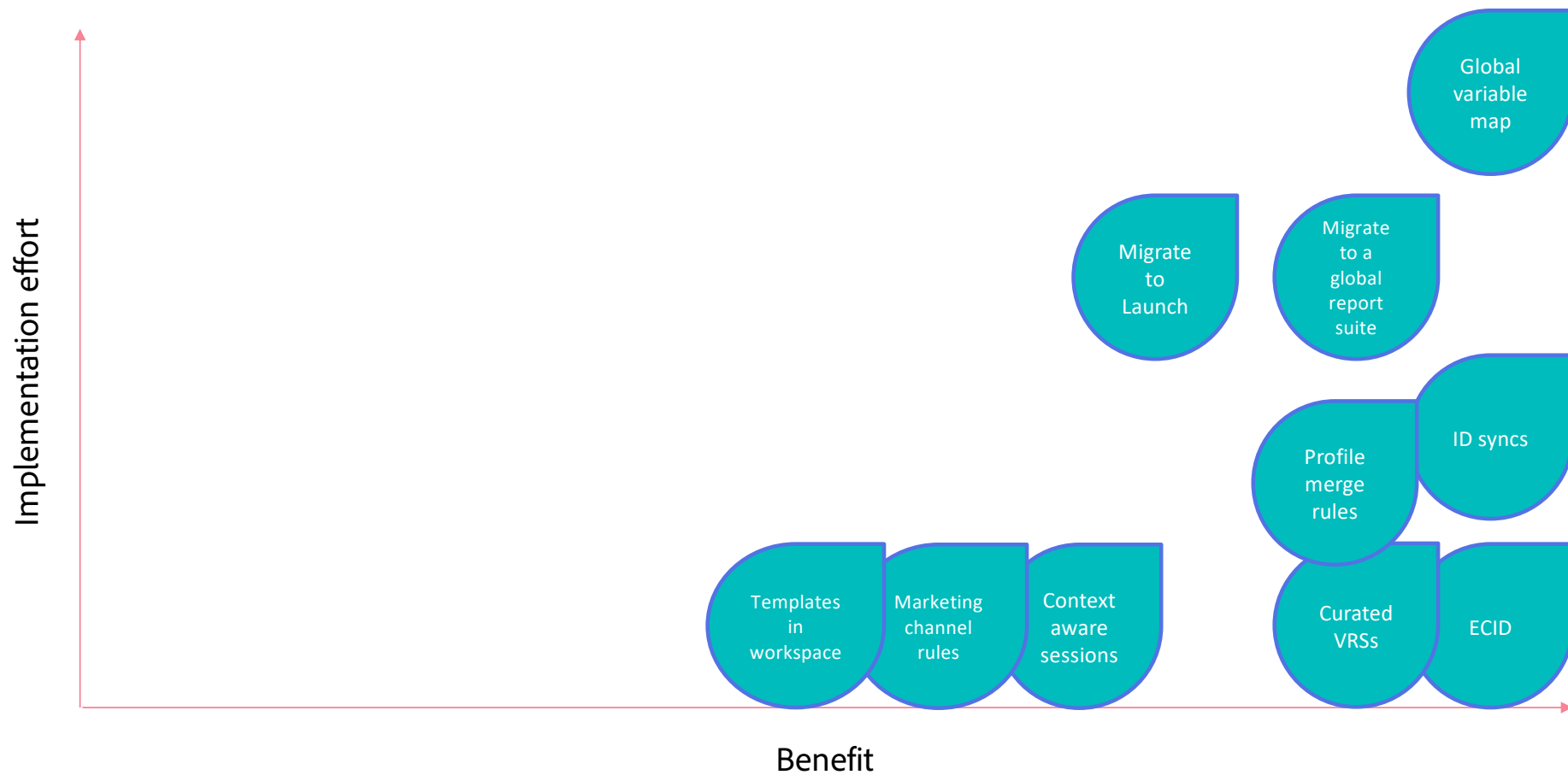
- Standard Dimensions
- Standard Metrics
- Conversion Events
- Merchandising Conversion Dimensions
- Conversion Dimensions

		IDENTITY DATA	SENSITIVE DATA	DATA GOVERNANCE		
		None	None	ACC-ALL	None	None
		None	None	ACC-ALL	None	None
<input type="checkbox"/> Browser Type		None	None	ACC-ALL	None	None
<input type="checkbox"/> Browser Width - Granular		None	None	ACC-ALL	None	None
<input type="checkbox"/> Código de Rastreamento		None	None	None	None	None
<input type="checkbox"/> Category		None	None	ACC-PERSON	None	None
<input type="checkbox"/> Color Depth		None	None	ACC-ALL	None	None
<input type="checkbox"/> Connection Type		None	None	ACC-ALL	None	None
<input type="checkbox"/> Cookie Support		None	None	None	None	None
<input type="checkbox"/> Domains		None	None	ACC-PERSON	None	None

[Help](#) [Terms of Use](#) [Privacy Policy](#) Language: [English](#)

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## Effort vs. benefit matrix



# 1

Libraries are the heart of the Experience Cloud. Create a process to keep them updated.

# 2

Experience Cloud's got brains. Know which features can do the hard work for you, and just set them & forget them.

# 3

Consider having the courage to migrate your Analytics implementation to a global report suite.





There's no place like a good Analytics Cloud implementation

# You Can Start Tomorrow!



<https://adobe.ly/RockSolidImplementation>

# Take the Survey for a chance to win!

(Survey section of the mobile app)

SESSION PRIZE

one per session



STARBUCKS CARD

**\$10** Starbucks Card



Day 1  
Bash  
Experience



Day 2  
Signed Sports  
Memorabilia



Day 3  
Bose  
Home Speaker



# Experience Success expert zone at the Adobe booth.

- Talk with Adobe's top experts in digital experiences
- Learn about Adobe's Digital Performance Services
- Meet with customer support teams
- Check-in for your personalized assessment

VISIT US AND  
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# Q & A

Thais Guimarães

[thais.guimaraes@adobe.com](mailto:thais.guimaraes@adobe.com)

LinkedIn: Thais Guimarães





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