

Module 1: Build a Campaign

This toolkit is designed for Adobe Campaign Classic Business Practitioner Professional Exam Aspirants. There are five modules. Study Each module per week to stick to schedule. Technical Parts of applications are depicted in videos, about which you can learn more from Experience League. You can visit Get prep page to understand the contents and anticipate in the learning journey.

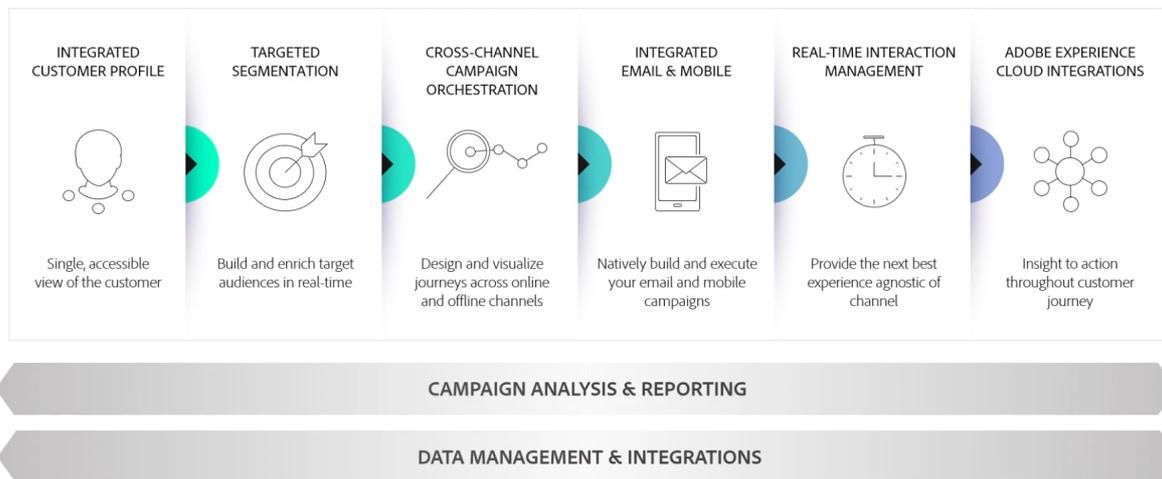
This is Business Practitioner Professional Exam, toolkit Module 1. This module contains six sections.

1.1 Get Started with Adobe Campaign

Adobe Campaign provides a platform for designing cross-channel customer experiences and an environment for visual campaign orchestration, real-time interaction management and cross channel execution.

Use Campaign to:

- **Drive** personalization and engagement through a single accessible view of the customer
- **Integrate** email, mobile, online and offline channels into the customer journey
- **Automate** the delivery of meaningful and timely messages and offers



Integrated customer profile

Profiles are centralized in a powerful cloud database. There are many possible mechanisms for acquiring profiles and building up this database: on-line collection via web forms, manual, or automatic import of text files, replication with company databases or other information systems. With Adobe Campaign, you can incorporate marketing history,

purchase information, preferences, CRM data, and any relevant PII data in a consolidated view to analyze and take action.

In Adobe Campaign, recipients are the default profiles targeted for sending deliveries (emails, SMS, etc.). Thanks to the recipient data that are stored in the database, you will be able to filter the target that will receive any given delivery and to add personalization data in your delivery contents. Other types of profiles exist in the database. They are designed for different uses. For example, seed profiles are made to test your deliveries before they are sent to the final target.

 Profile management basics are explained in [this section](#).

 Learn how to add profiles to Campaign in [this section](#).

Targeted segmentation

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

The advanced Data Management functionality extends the data processing capabilities. It simplifies and optimizes the targeting process by including data not modeled in the datamart.

 Learn more about segmentation and audience creation in [this section](#).

Cross-channel campaign orchestration

Adobe Campaign lets you design and orchestrate targeted and personalized campaigns on multiple channels: email, direct mail, SMS, push notification. A single interface provides you with all the functions required to schedule, orchestrate, configure, personalize, automate, execute, and measure all your campaigns and communications.

 Learn how to design, schedule and execute a campaign in [this section](#).

Workflows

Adobe Campaign offers a comprehensive graphical environment that allows you to design complex processes including segmentation, campaign execution, file processing, etc. For example, you can use a workflow to download a file from a server, decompress it, and then import its records into the Adobe Campaign database.

A workflow can also involve users by assigning them tasks or having them approve performed tasks. This means you can assign a task to one or several users to work on content or specify targets, and approve proofs before sending the message.

Workflows can be used in different contexts, as for example:

- Targeting to manage audiences or send messages.
- Data management (ETL) to manipulate data.
- Importing data into Campaign database.
- Technical processes such as database cleanup, recovering tracking information, etc.

 Learn how to design and execute workflows in [this section](#).

Reporting and analysis

Adobe Campaign lets you monitor and interpret the behavior of your customers by gradually enriching their data and profiles. The reporting and analysis tools let you capitalize on each new campaign, target your marketing initiatives better, and optimize their impact and return on investment.

In addition to powerful, out-of-the box reporting templates, Adobe Campaign lets you create custom reports on a delivery, campaign, user, or segment level. Do descriptive analysis, summarize ROI, or export data to Adobe Analytics and other solutions for further data visualization and analysis.

The campaign reporting feature facilitates the creation of dynamic reports. You can use drag-and-drop variables to customize your reports and to analyze the success of your campaigns. Depending on the complexity of your queries and calculations, the data can be aggregated into a list view or accessed in a format that makes it easy to generate marketing analytics reports.

 Learn more about report and tracking capabilities in [this section](#).

Adobe Experience Cloud integrations

You can combine the delivery functionalities and advanced campaign management functionalities of Adobe Campaign with a set of solutions created to help you personalize your users' experience: Adobe Experience Manager, Adobe Analytics, Adobe Target or Adobe Experience Cloud triggers for example.

 Learn how to integrate with Adobe services and solutions in [this section](#).

More about Campaign capabilities

Adobe Campaign offers a set of capabilities to help you implement and optimize the conversational marketing functionalities depending on your needs and your architecture. Some of them are core capabilities and some depend on the installation of a package on your configuration. A detailed product description is available here: [Adobe Campaign v8 Product Description](#).

 Already familiar with Campaign Classic? Learn key differences between Campaign Classic and Campaign v8 in [this page](#).

See also

- [Campaign workspace](#)
- [Campaign v8 Compatibility matrix](#)
- [Connect to Campaign](#)
- [Frequently Asked Questions](#)

1.2 Communication channels

With Adobe Campaign, you can send cross-channel campaigns including emails, SMS, LINE messages, Push notifications and direct mails, and measure their effectiveness using various dedicated [reports](#). These messages are designed and sent through deliveries, and can be personalized for each recipient.

Core functionalities include targeting, definition and personalization of messages, execution of communications, and the associated operational reports. The main functional access point is the delivery wizard. This access point leads to multiple capabilities covered by Adobe Campaign.

NOTE

Adobe Campaign offers a set of tools to monitor your deliverability and optimize email sending. Learn more in [this section](#).

Delivery sending can be automated by preparing a delivery and/or sending it in the process of a workflow. For more on delivery-type activities in workflows, refer to [this section](#).

Adobe Campaign offers the following delivery channels:

1. **Email channel:** email deliveries let you send personalized emails to the target population. Refer to [About email channel](#).
2. **Direct mail channel:** direct mail deliveries let you generate an extraction file which contains data on the target population. Refer to [About direct mail channel](#).
3. **Mobile channel:** deliveries on mobile channels let you send personalized SMS or LINE messages to the target population. Refer to [SMS channel](#).

4. **Mobile application channel:** mobile app deliveries let you send notifications to iOS and Android systems. Refer to the [Mobile app channel](#) chapter.

Other channels are described on [this page](#).

NOTE

The number of available channels depends on your contract. Please check your license agreement.

Deliveries can be carried out **online** (via email, one of the mobile channels and push notifications), and **offline** (direct mail channel).

Depending on the channel, delivery modes can be:

- Direct mass delivery via Adobe Campaign (default mode for email channel).
- External delivery via a specialist operator who is given the output file generated by the delivery wizard (default mode for direct mail channel).

External accounts are configured via the **Administration > Platform > External accounts** node. This configuration should be performed by expert users only.

Email deliveries

The [Email channel](#) is one of the core channels in Adobe Campaign, allowing you to schedule and send personalized emails to specific targets.

You can send different types of emails:

- Single-send emails: emails that you can send once to a defined target. They are usually used to promote a specific content that would be prepared and sent only once (newsletter, promotional email, etc.).
- Recurring emails: in a campaign, send the same email regularly and aggregate each send and its reports on a periodic basis. The same email is sent, but usually to a different target, based on the eligible target for the day of the send. A common example is a birthday email. For more on this, refer to [Recurring deliveries](#).
- Transactional emails: unitary emails that are triggered based on your customers' behavior. Refer to [Transactional messaging](#).

To learn about delivery usage and recommendations, consult Campaign [Delivery best practices](#).

For more on the different types of deliveries, refer to [this section](#).

Mobile deliveries

Adobe Campaign allows you to deliver [SMS](#) and [LINE](#) messages on mobiles.

For SMS messages, you can create, modify, and personalize messages in text format only. You can also preview your SMS messages before they are sent.

For LINE messages, you can send text or images and links.

To deliver SMS or LINE messages to a mobile phone you need:

- An external account configured on the **Mobile (SMS)** channel or on the **LINE** channel.
- An SMS or LINE delivery template that is correctly linked to this external account.

Push notifications

Adobe Campaign allows you to send personalized and segmented [push notifications](#) on iOS and Android mobile devices, through dedicated apps. Once configuration and integration steps have been performed, iOS and Android deliveries can be created and sent. You can also design rich notifications with images or videos.

Direct mail

[Direct mail](#) is an offline channel that allows you to personalize and generate the file required by direct mail providers. It gives you the possibility to mix online and offline channels in your customer journeys.

Online channels allow you to create your messages (email, SMS, mobile app delivery, etc.) and send them to your audience directly from Adobe Campaign. With offline channels, it is different. When you prepare a direct mail delivery, Adobe Campaign generates a file including all the targeted profiles and the chosen contact information (postal address for example). You will then be able to send this file to your direct mail provider who will take care of the actual sending.

Other channels

Adobe Campaign offers Telephone delivery template, which is used to create external deliveries. Using this channel implies you set up dedicated methodologies to process output files. Configuration steps are the same as for [Direct mail channel](#).

NOTE

The Telephone channel is not available out-of-the-box. Its implementation requires Adobe Consulting or an Adobe Partner to be engaged. Please reach out to your Adobe representative for more information.

In addition, 'Other' type deliveries use a specific technical template which does not execute a process: this lets them manage marketing actions executed outside of the Adobe Campaign platform.

This channel has no specific mechanism. It is a generic channel that has its own external account routing option, delivery template type and campaign workflow activity, just like any other communication channel available in Adobe Campaign.

This channel is designed for descriptive purposes only, for example to define deliveries for which you want to keep a trace of the target of a campaign performed in a tool other than Adobe Campaign.

Types of deliveries

There are three types of delivery objects in Campaign:

Single delivery

A **delivery** is a standalone delivery object that is executed once. It can be duplicated, prepared again, but as long as it is in its final state (canceled, stopped, finished), it cannot be reused.

Deliveries can be created either from the list of deliveries, or within a workflow via a [Delivery](#) activity.

Workflows also provide specific delivery activities according to the type of channel you want to use. For more on these activities, refer to [this section](#).

Recurring delivery

A **recurring delivery** lets you create a new delivery each time the activity is executed. This avoids you having to create a new delivery for recurring tasks.

As an example, if you run this type of activity once a month, you will end up with 12 deliveries after a year.

Recurring deliveries are created within workflows via the [Recurring delivery activity](#). An example of this activity being used is presented in this section: [Creating a recurring delivery in a targeting workflow](#).

Continuous delivery

A **continuous delivery** lets you add new recipients to an existing delivery, which avoids having to create a new delivery each time it is executed.

If an information in the delivery changes (content, name, etc.), a new delivery object is created at the delivery execution. If no information was changed, the same delivery object is reused and the delivery and tracking logs are added in the same object.

As an example, if you run this type of activity once a month, you will end up with a single delivery after a year (provided you did not make any change to the delivery).

Continuous deliveries are created within workflows via the [Continuous delivery activity](#).

1.3 Get started with marketing campaigns

Campaigns include actions (deliveries) and processes (importing or extracting files), as well as resources (marketing documents, delivery outlines). They are used in marketing campaigns. Campaigns are part of a program, and programs are included in a campaign plan.



Discover how to create a marketing plan, programs, and campaigns [in video](#)

To create a marketing campaign:

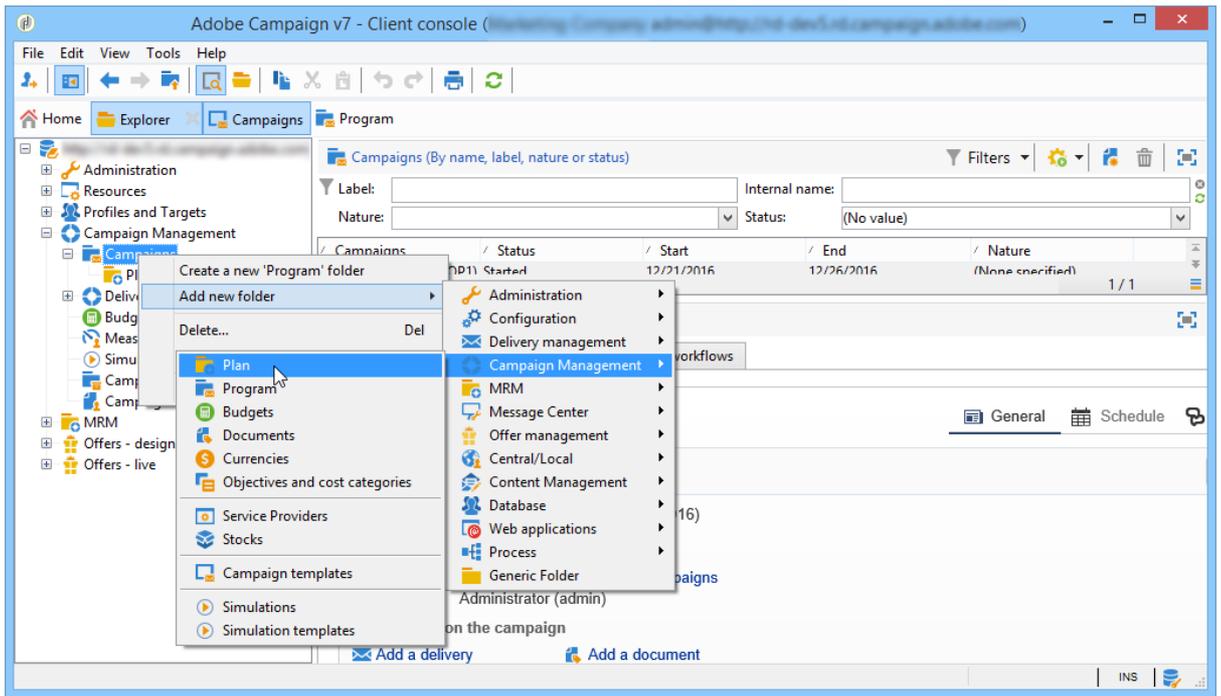
1. Create a campaign: discover campaigns and their characteristics: label, type, start and end dates, budget, associated resources, manager(s) and participants. [Learn more.](#)
2. Define target population(s): create a workflow with targeting queries. [Learn more.](#)
3. Create deliveries: select channel(s) and define the content to be sent. [Learn more.](#)
4. Approve deliveries. [Learn more.](#)
5. Monitor deliveries. [Learn more.](#)
6. Plan campaigns and associated costs. [Learn more.](#)

When these steps have been completed, you can start the deliveries (refer to [this section](#)), check the data, processes and information relating to the deliveries and, if necessary, manage the associated documents (refer to [this section](#)). You can also track the execution of the processing phases of campaigns and deliveries (refer to [this section](#)).

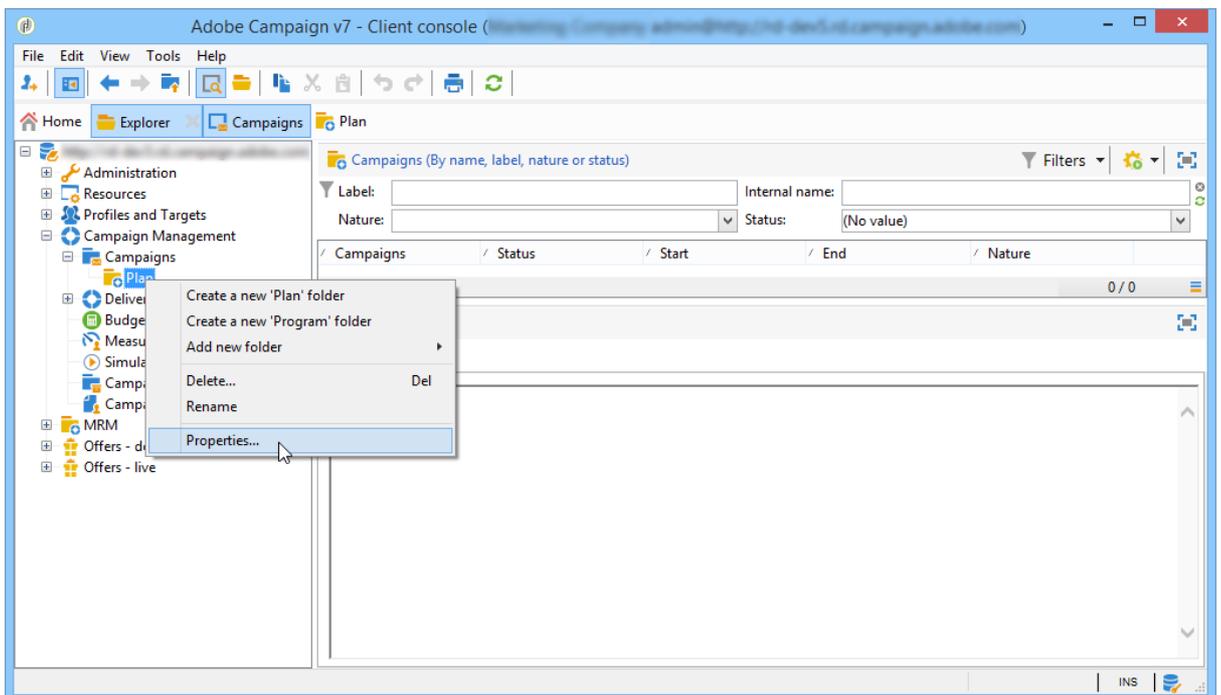
Create plan and program hierarchy

To configure your folder hierarchy for marketing plans and programs:

1. Click the **Explorer** icon on the home page.
2. Right-click the folder in which you want to create your plan.
3. Select **Add new folder > Campaign Management > Plan**.



4. Rename the plan.
5. Right-click the newly created plan and select **Properties...**

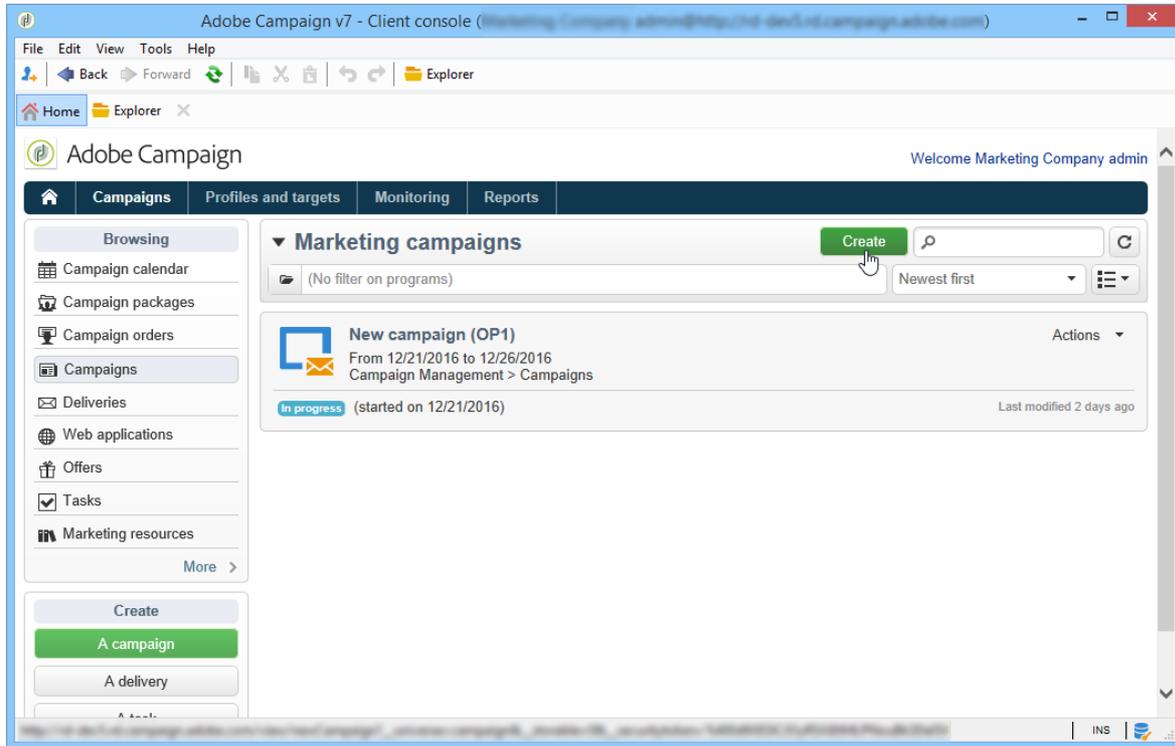


6. In the **General** tab, modify the **Internal name** to avoid duplicates during package exports.
7. Click **Save**.
8. Right-click the newly created plan and select **Create a new 'Program' folder**.
9. Repeat the above steps to rename your new program folder and its internal name.

Create a campaign

Add a campaign

You can create a campaign via the list of campaigns. To display this view, select the **Campaigns** menu in the **Campaigns** dashboard.



The **Program** field lets you select the program to which the campaign will be attached. This information is mandatory.

1 Select a campaign template
Template:

2 Complete or change the campaign settings
Label:
Nature: Main channel:
Program:

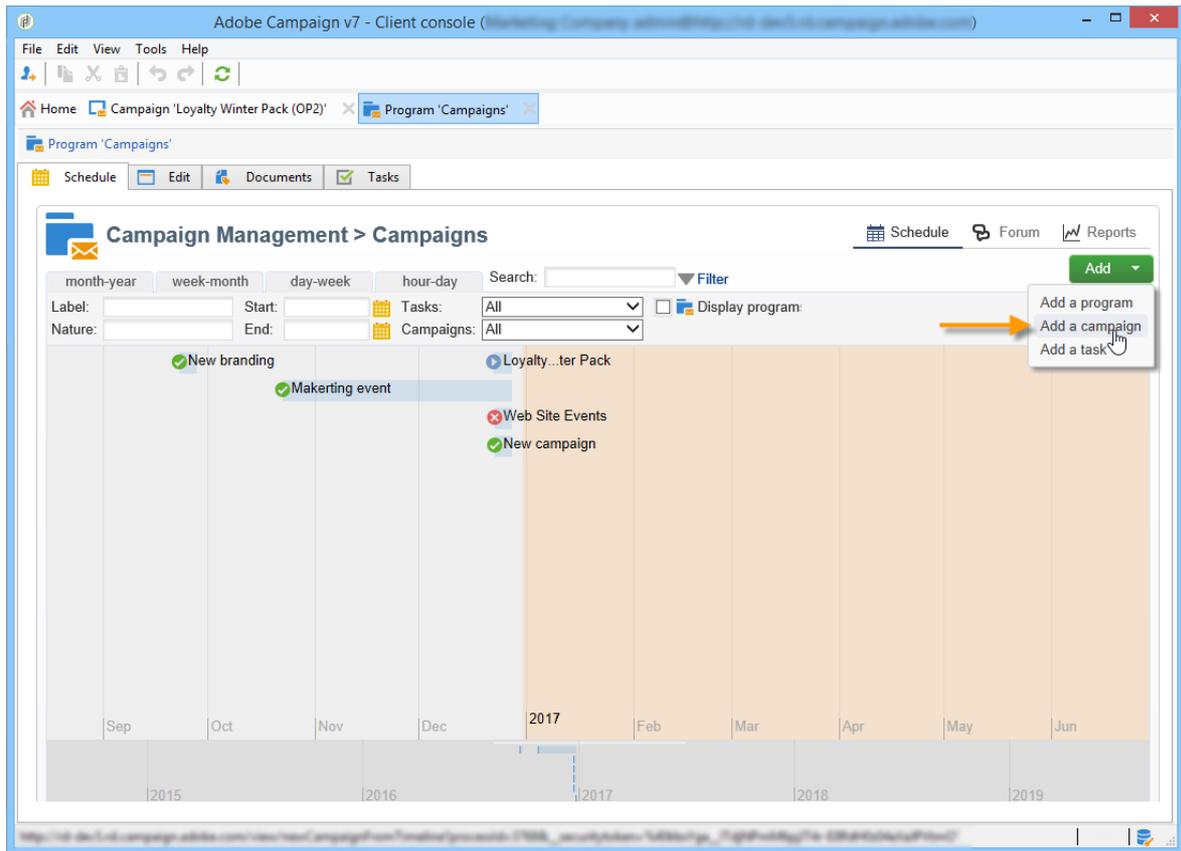
Schedule
Start: End:

Description of the campaign

Styles

New Customer Communication Campaign ([more information here](#))
Welcoming Mail with Newsletter Subscription
Starting Loyalty Program
Mobile Offer / Mail and send new Catalog

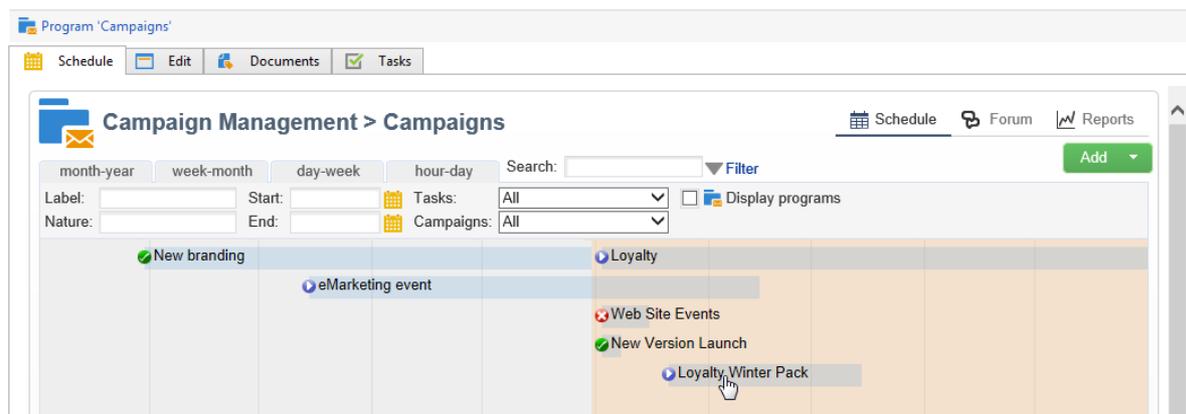
Campaigns can also be created via a program. To do this, click the **Add** button in the **Schedule** tab of the concerned program.



When you create a campaign via the **Schedule** tab of a program, the campaign is automatically linked to the concerned program. The **Program** field is hidden in this case.

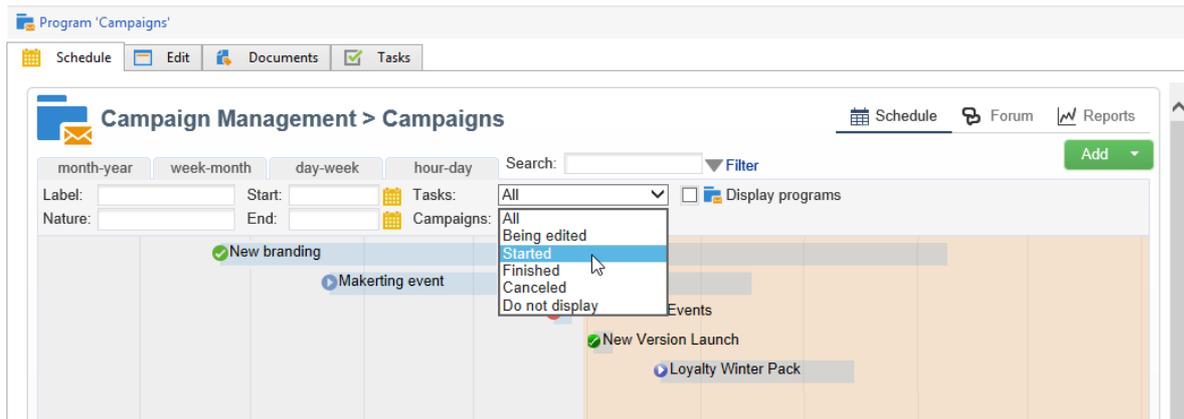
In the campaign creation window, select the campaign template and add a name and a description of the campaign. You can also specify the campaign start and end dates.

Click **OK** to create the campaign. It is added to the program schedule.



NOTE

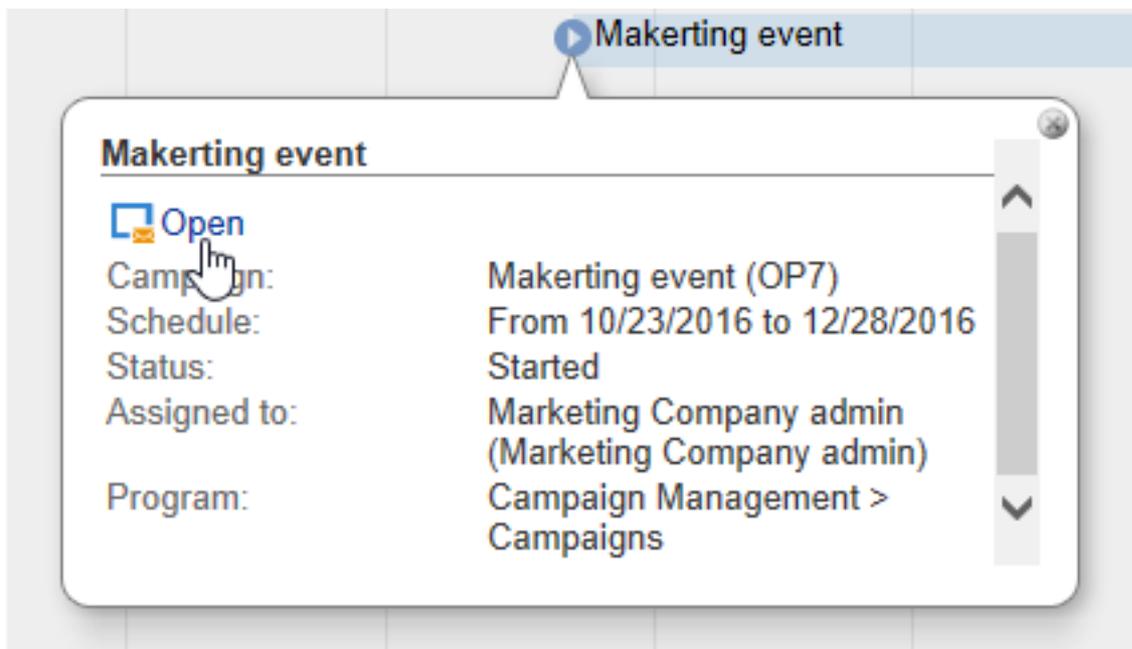
To filter the campaigns to display, click the **Filter** link and select the status of campaigns to display.



Edit and configure a campaign

You can then edit the campaign you have just created and define its parameters.

To open and configure a campaign, select it from the schedule and click **Open**.



This takes you to the campaign dashboard.

Recurring and periodic campaigns

A recurring campaign is a campaign based on a specific template, whose workflows are configured to be executed according to an associated schedule. The workflows will therefore be recurring within a campaign. The targeting is duplicated on each execution and the various processes and target populations are tracked. It is also possible to execute future targetings in advance, via the coverage period during automatic workflow creation, in order to launch simulations with target estimates.

A periodic campaign is a campaign created automatically according to the execution schedule of its template.

Create a recurring campaign

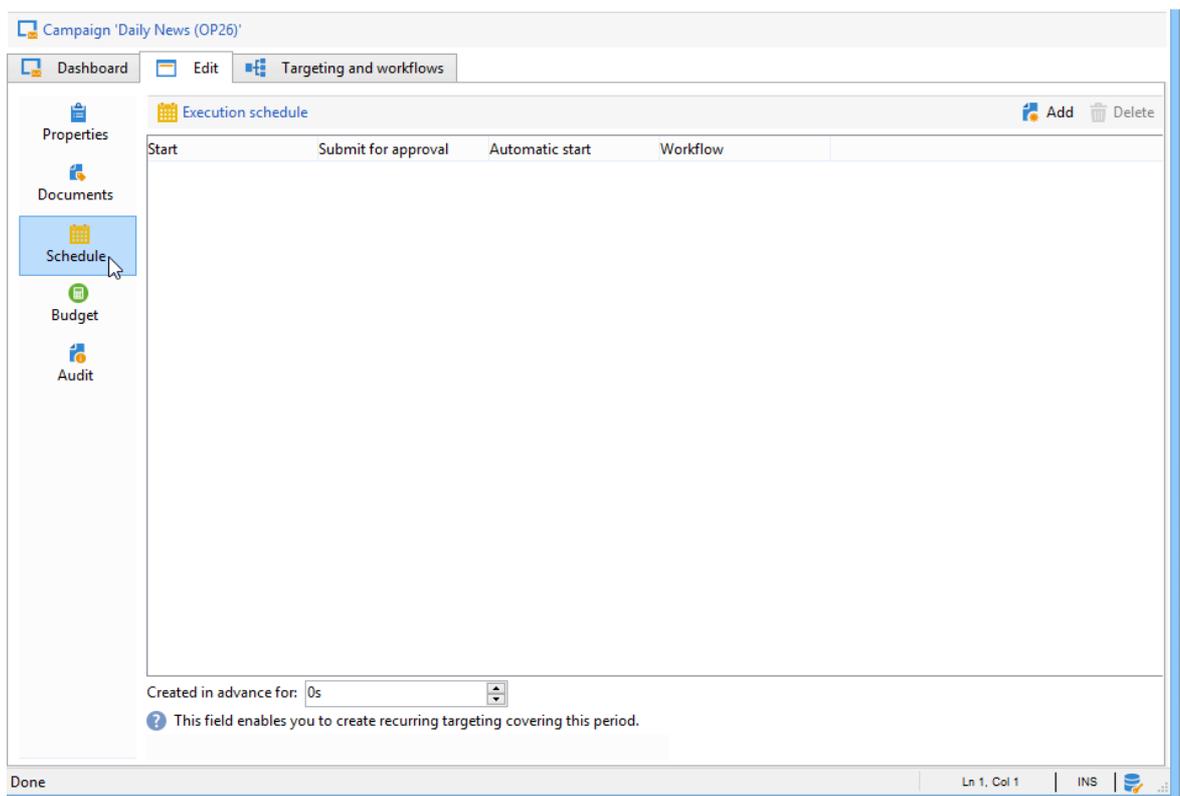
Recurring campaigns are created from a specific template defining the workflow template to be executed and the execution schedule.

Create a template for recurring campaigns

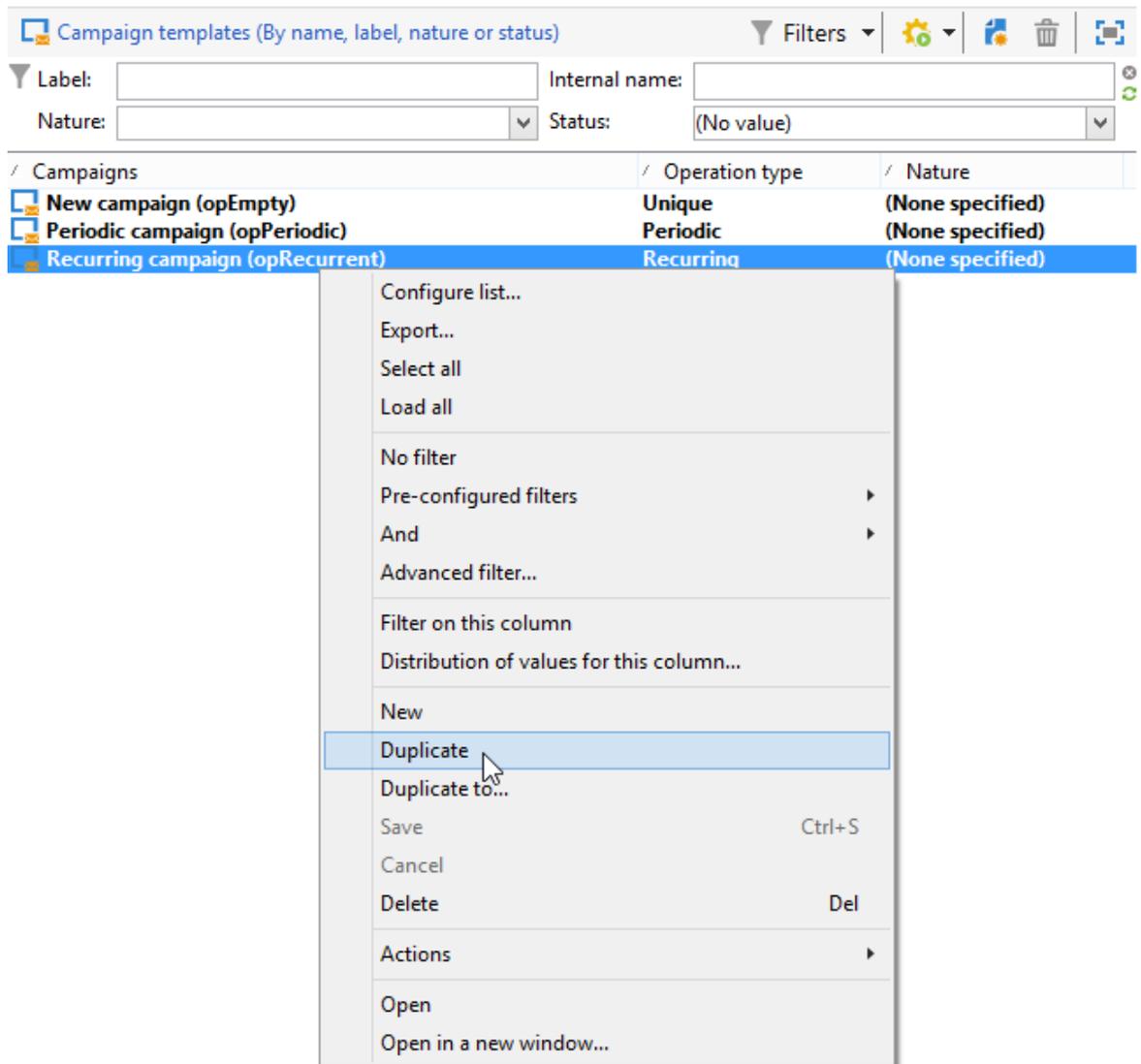
1. Create a **Recurring** campaign template.

NOTE

It is recommended that you duplicate the default template instead of creating an empty template.

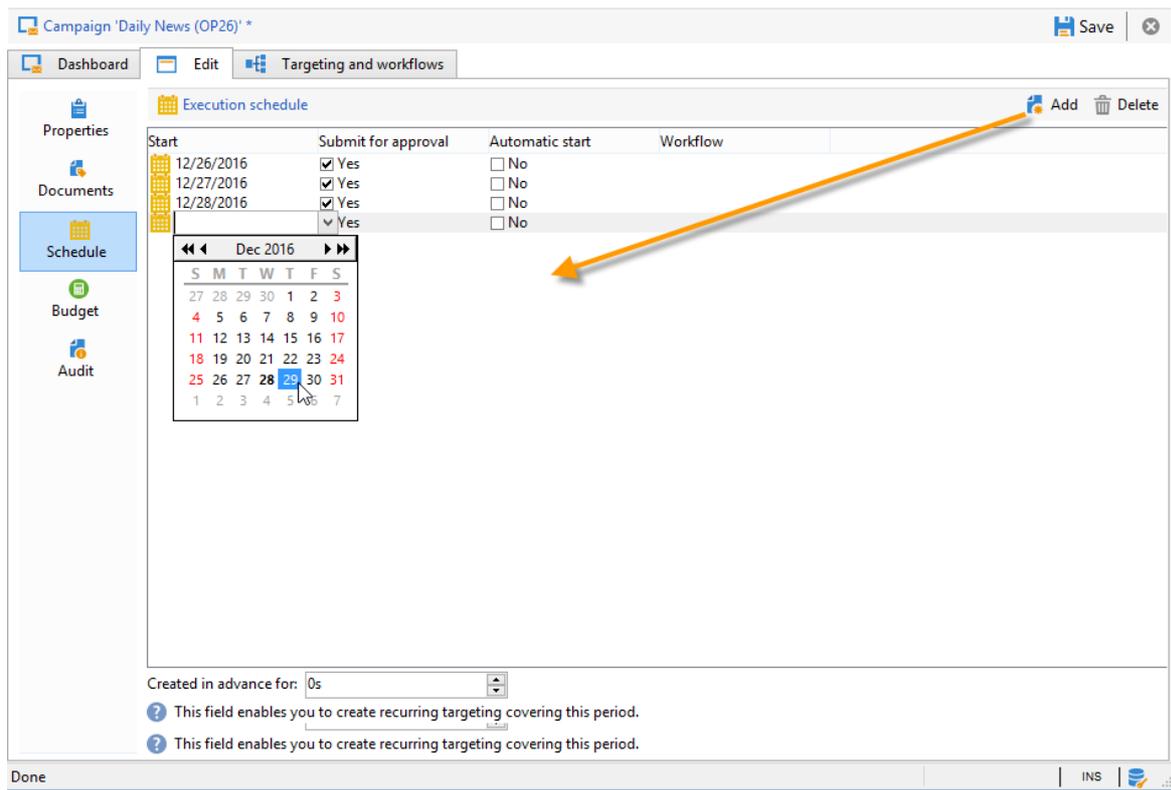


2. Enter the name of the template and the duration of the campaign.



- For this type of campaign, a **Schedule** tab is added in order to create the template execution schedule.

In this tab, specify the planned execution dates of the campaigns based on this template.



The configuration mode of the execution schedule coincides with the **Scheduler** object of the Workflow. For more on this, refer to [this section](#).

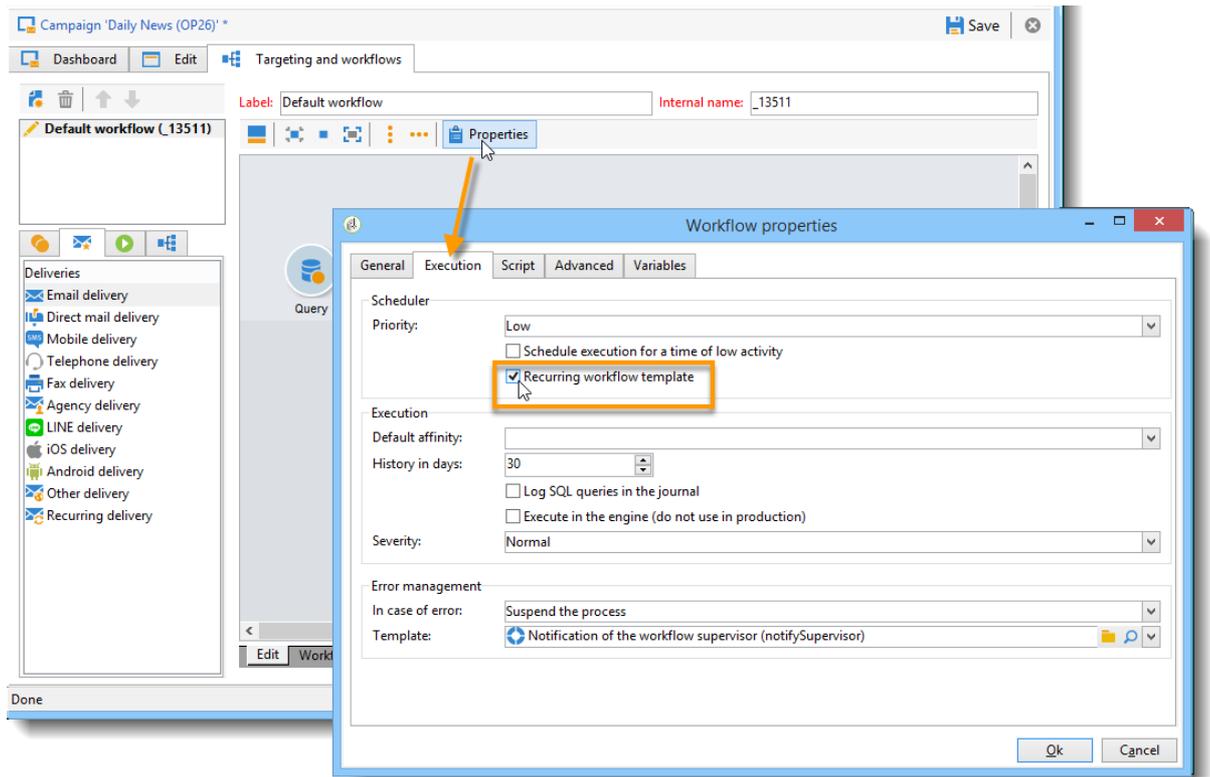
IMPORTANT

Execution schedule configuration must be performed carefully to avoid overloading the database. Recurring campaigns duplicate the workflow(s) of their template depending on the specified schedule. The implementation of excessively frequent workflow creation can hinder the operation of the database.

1. Specify a value in the **Create in advance for** field in order to create the corresponding workflows for the period indicated.
2. Create the workflow template to be used in campaigns based on this template, with the targeting parameters and one or more generic deliveries.

NOTE

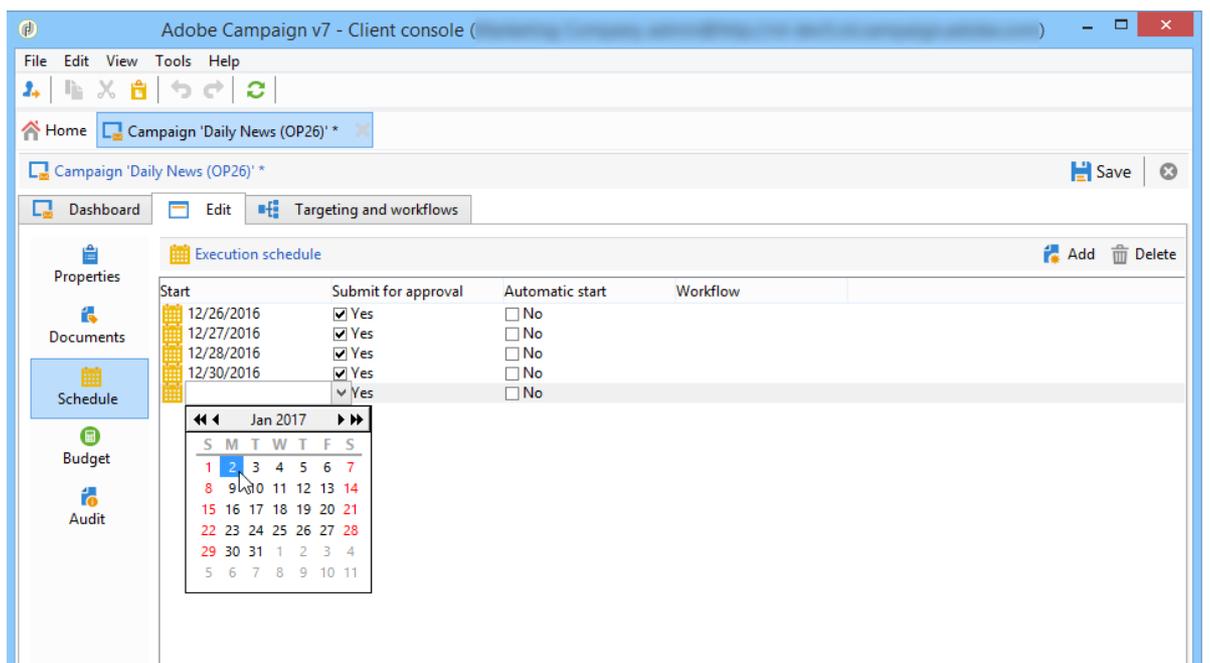
This workflow must be saved as a recurring workflow template. To do this, edit the workflow properties and select the **Recurring workflow template** option in the **Execution** tab.



Create the recurring campaign

To create the recurring campaign and execute its workflows according to the schedule defined in the template, apply the following procedure:

1. Create a new campaign based on a recurring campaign template.
2. Fill in the workflow execution schedule.



3. The campaign schedule lets you enter an automatic workflow creation or execution start date for each line.

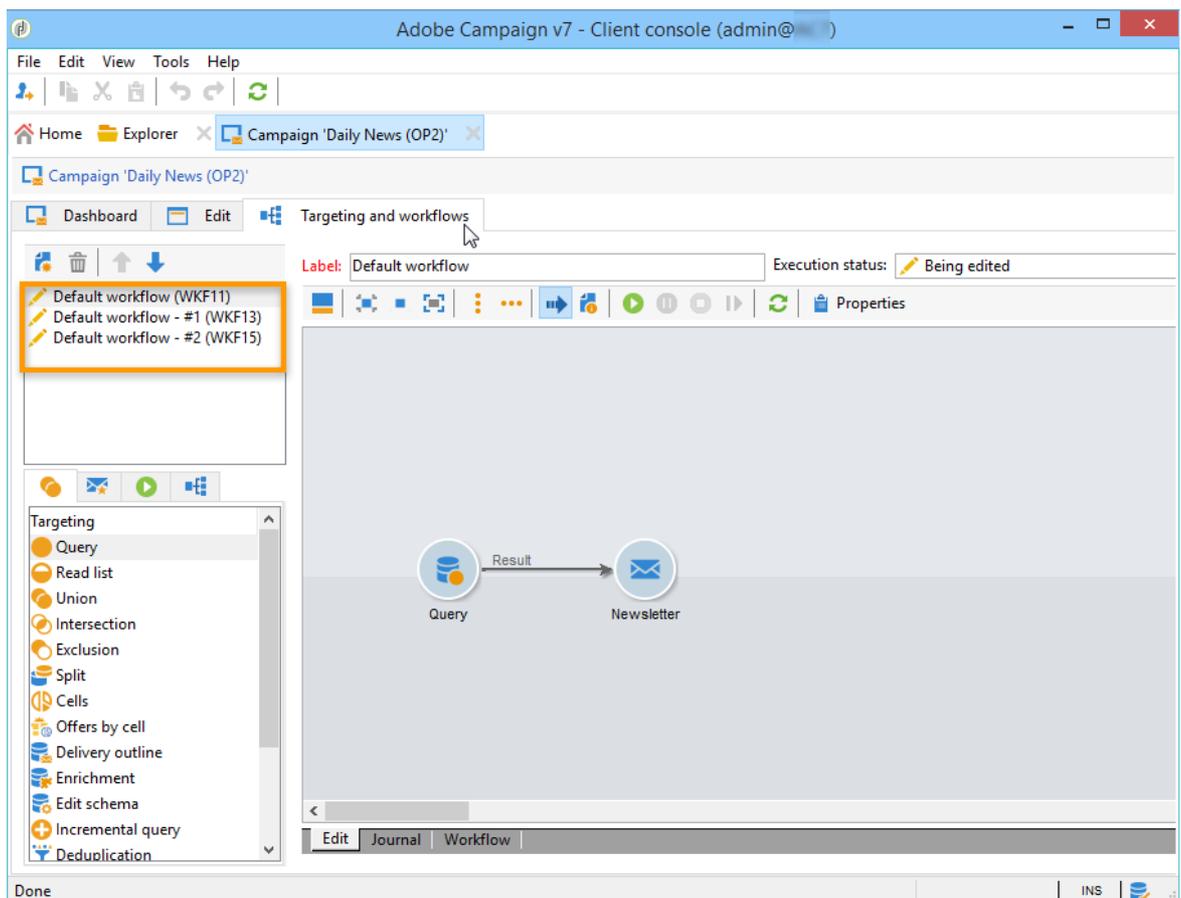
For each line, you can add the following additional options:

- **To be approved** : lets you force the delivery approval requests in the workflow.
- **To be started** : lets you start the workflow when the start date has been reached.

The **Create in advance for** field lets you create all the workflows covering the period entered.

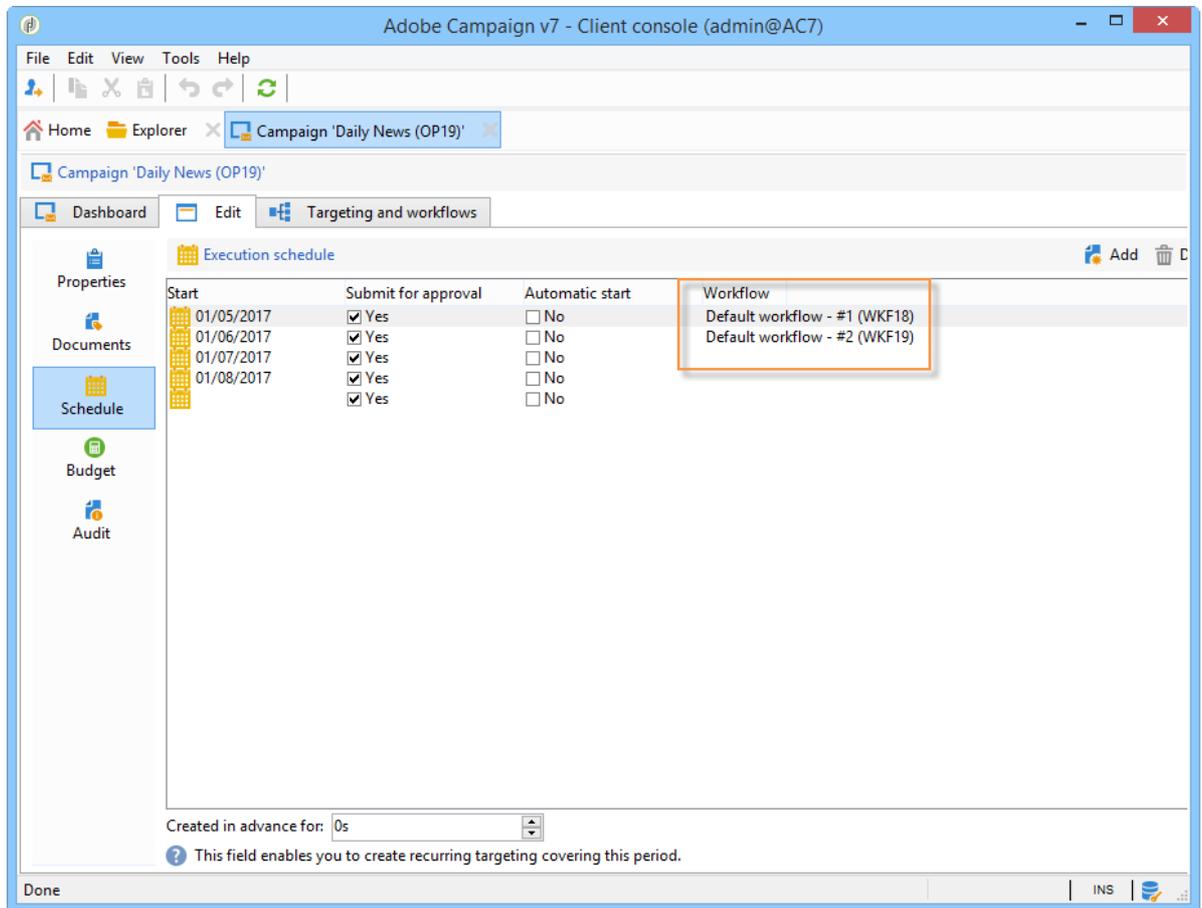
Upon execution of the **Jobs on campaigns** workflow, the dedicated workflows are created based on the occurrences defined in the campaign schedule. A workflow is thus created for each execution date.

4. Recurring workflows are created automatically from the workflow template present in the campaign. They are visible from the **Targeting and workflows** tab of the campaign.

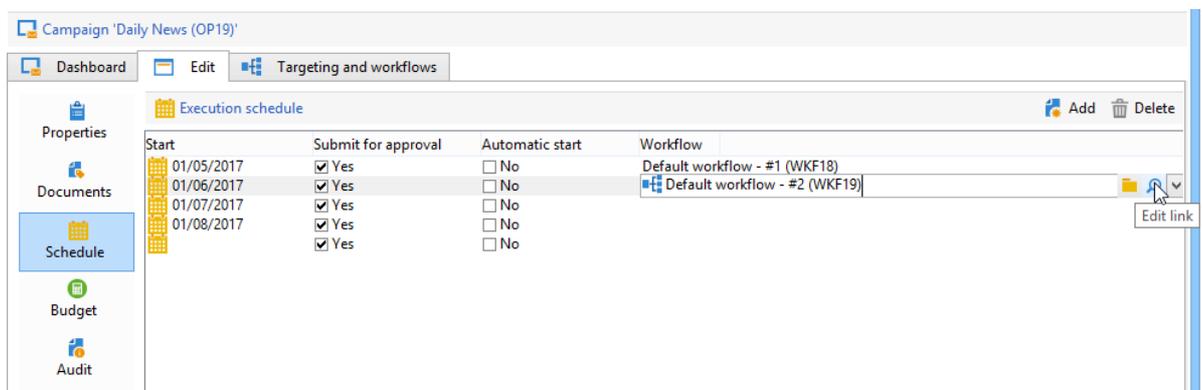


The label of a recurring workflow instance consists of its template label and the workflow number, with the # character in between.

Workflows created from the schedule are automatically associated with it in the **Workflow** column of the **Schedule** tab.



Each workflow can be edited from this tab.



NOTE

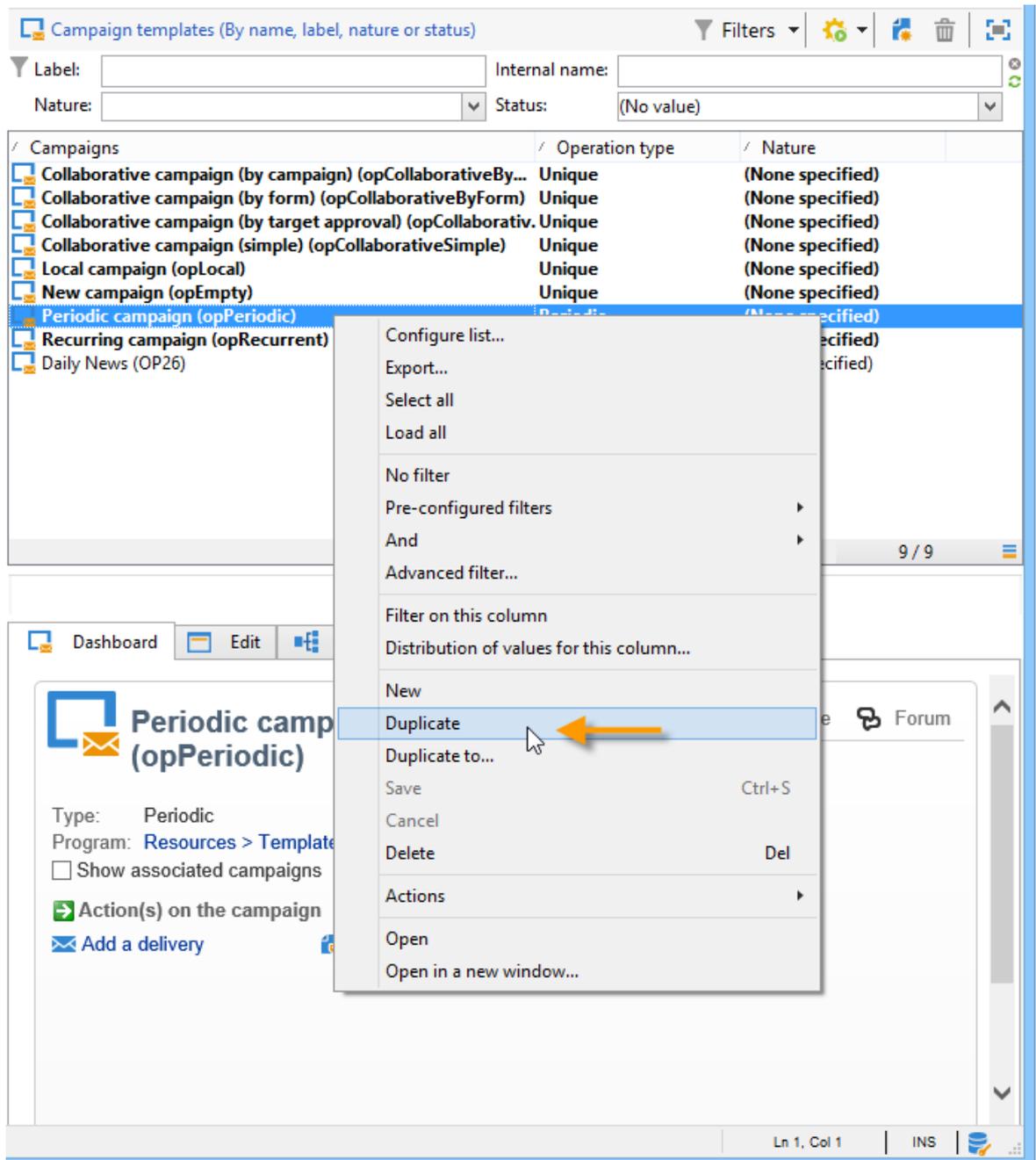
The start date of the schedule line associated with the workflow is available from a variable of the workflow with the following syntax:
`$date(instance/vars/@startPlanningDate)`

Create a periodic campaign

A periodic campaign is a campaign based on a specific template that lets you create campaign instances based on an execution schedule. Campaign instances are created automatically based on a periodic campaign template, depending on the frequency defined in the template schedule.

Create the campaign template

1. Create a **Periodic** campaign template, preferably by duplicating an existing campaign template.

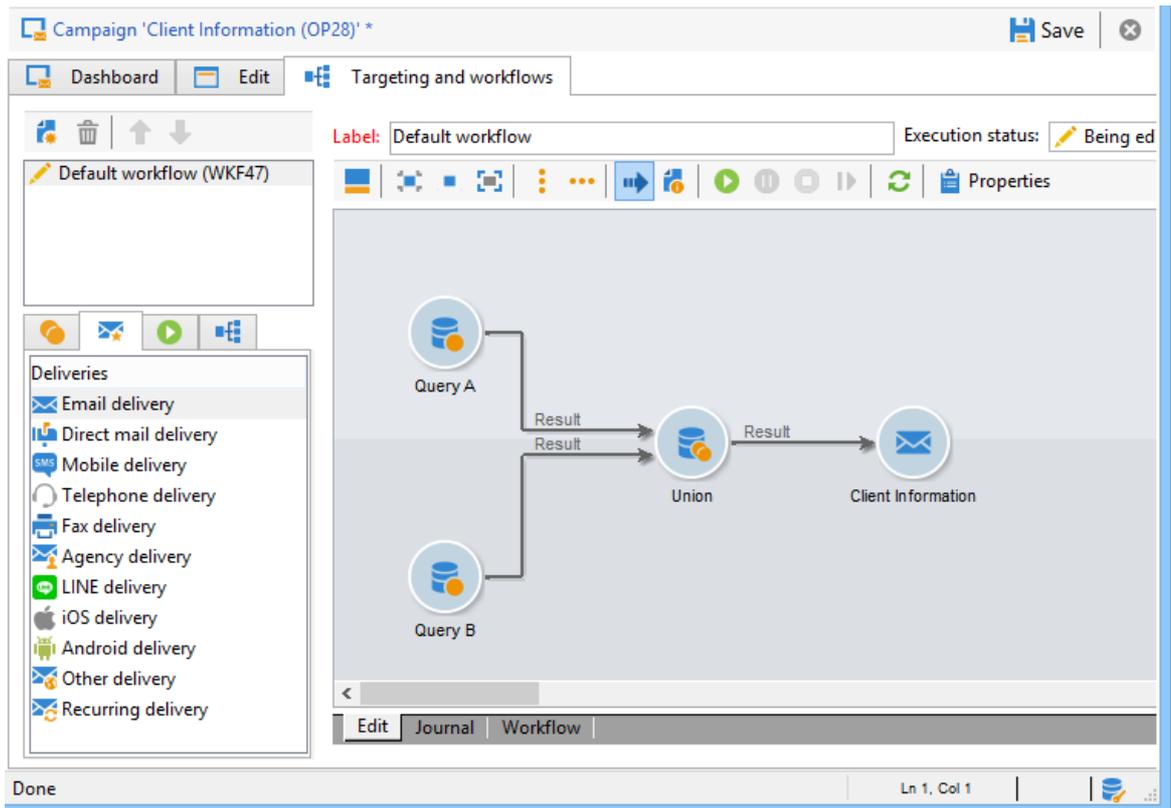


2. Enter the properties of the template.

NOTE

The operator whom the template is assigned to needs to have the appropriate rights to create campaigns in the selected program.

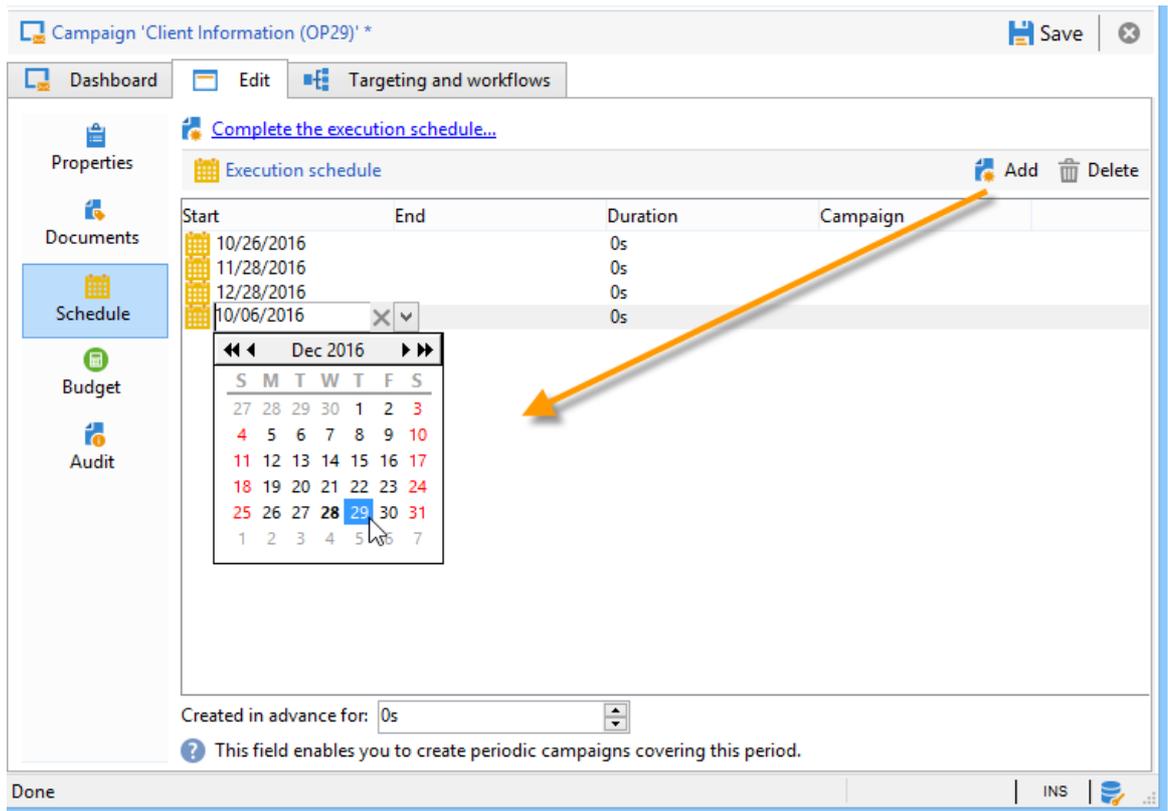
3. Create the workflow associated with this template. It will be duplicated in every periodic campaign created by the template.



NOTE

This workflow is a workflow template. It cannot be executed from the campaign template.

4. Complete its execution schedule as for a recurring campaign template: click the **Add** button and define the start and end dates, or fill in the execution schedule via the link.

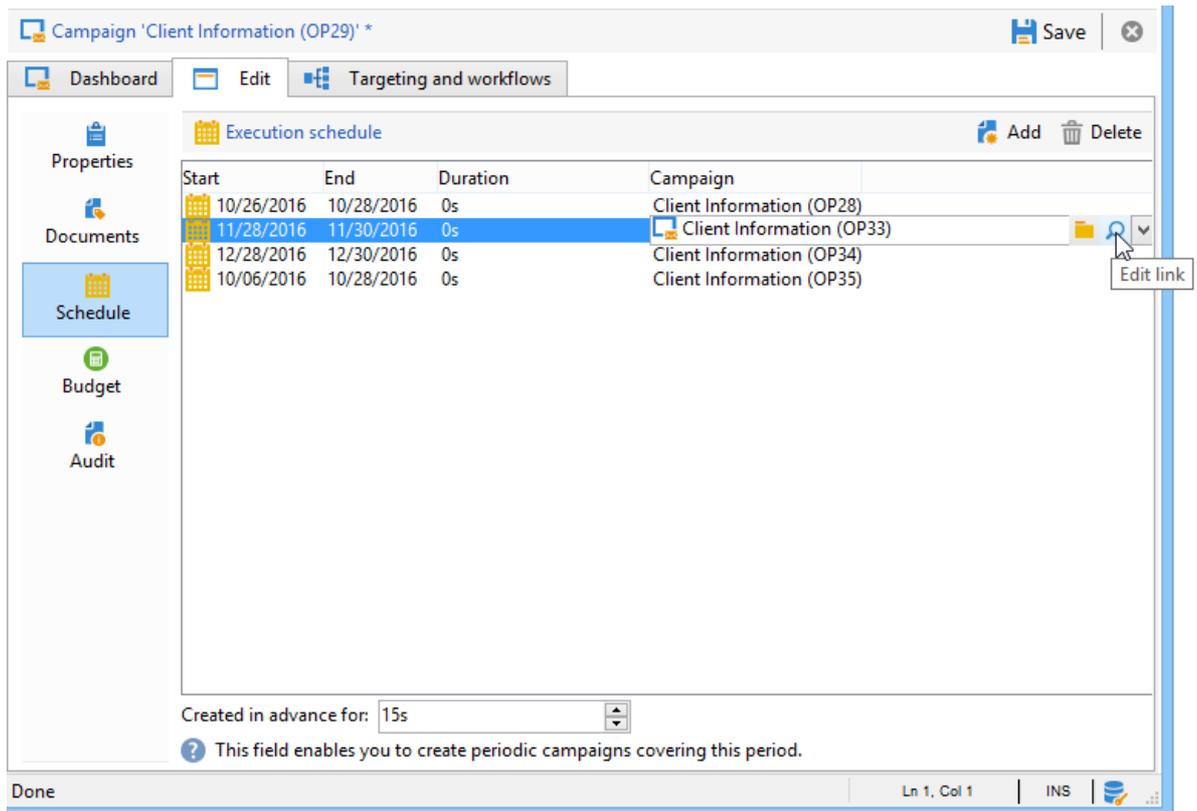


IMPORTANT

Periodic campaign templates create new campaigns according to the schedule defined above. It must therefore be completed carefully, to avoid overloading the Adobe Campaign database.

5. Once the execution start date is reached, the matching campaign is created automatically. It takes on all the characteristics of its template.

Each campaign can be edited via the template schedule.



Each periodic campaign contains the same elements. Once created, it is managed as a standard campaign.

Tutorial video

This video shows how to create a marketing plan, programs, and campaigns.

Additional Campaign how-to videos are available [here](#).

1.4 Get started with personalization

Messages delivered by Adobe Campaign can be personalized in several different ways, concerning the content or the appearance of messages. These ways can be combined according to criteria taken particularly from the recipient profiles. For email deliveries, you can define the elements and personalization conditions of a delivery directly in JavaScript from the **Source** tab of the message. In general, Adobe Campaign allows you to:

- Personalize the message format. See [Message content](#).
- Insert dynamic personalization fields. See [Personalization fields](#).
- Insert predefined personalization blocks. See [Personalization blocks](#).
- Create conditional content. Refer to the [Conditional content](#) section.

CAUTION

The following variables are internal variables that can be used for personalization but must not be modified: **delivery, message, dataSource, targetData, provider, coupon, couponValue, proposition.**

1.5 Design and execute marketing campaigns

Adobe Campaign lets you define, optimize, execute and analyze communications and marketing campaigns. Adobe Campaign acts like a unified order and execution center for marketing strategies. For more on this, refer to [Access campaigns](#) and [Create marketing campaigns](#).

In addition, the **Marketing Resource Management (MRM)** module lets you control marketing actions in a collaborative mode by providing complete management and real-time tracking of the tasks, budgets and marketing resources involved. The Marketing Resource Management lets you optimize and regulate the management of internal and external processes, resources and marketing campaigns, as well as third party relations (agencies, printers, etc.). For more on this, refer to [this section](#).

NOTE

For more on the Adobe Campaign core functionalities, refer to [this section](#) section. Capabilities related to population targeting, message personalization and message delivery on the various channels are detailed in [this section](#).



[Discover marketing campaigns keys concepts in video](#)

Core concepts

The following concepts need to be known in the context of Campaign:

- **Campaign**

A campaign centralizes all the elements related to a marketing campaign: deliveries, targeting rules, costs, export files, related documents, etc. Each campaign is attached to a program.

For more on this, refer to [Adding a campaign](#).

- **Program**

A program lets you define marketing actions for a calendar period: launch, canvassing, loyalty, etc. Each program contains campaigns linked to a calendar, which provides an overall view.

- **Plan**

The marketing plan can contain multiple programs. It is linked to a calendar period, has an allocated budget and can also be linked up to documents and objectives.

For more on this, refer to [Campaign calendar](#).

- **Workflow**

A campaign workflow contains the same activities as for all workflows but is specific to the campaign. It enables you to create and configure deliveries for all available channels.

For more on this, refer to [this section](#).

- **Objectives**

Within the campaign, program or plan, you can state a list of objectives. These are quantified values to be reached. At the end of the campaign, program or plan, the MRM module lets you compare the objectives and results in dedicated reports.

- **Delivery outline**

A delivery outline is a structured description of a delivery. Every delivery can refer to a delivery outline which contains, for example, the related offers, documents to be attached, or a link to stores. An offer can be referenced in the delivery according to the delivery outline selected.

For more on this, refer to [this section](#).

Tutorial

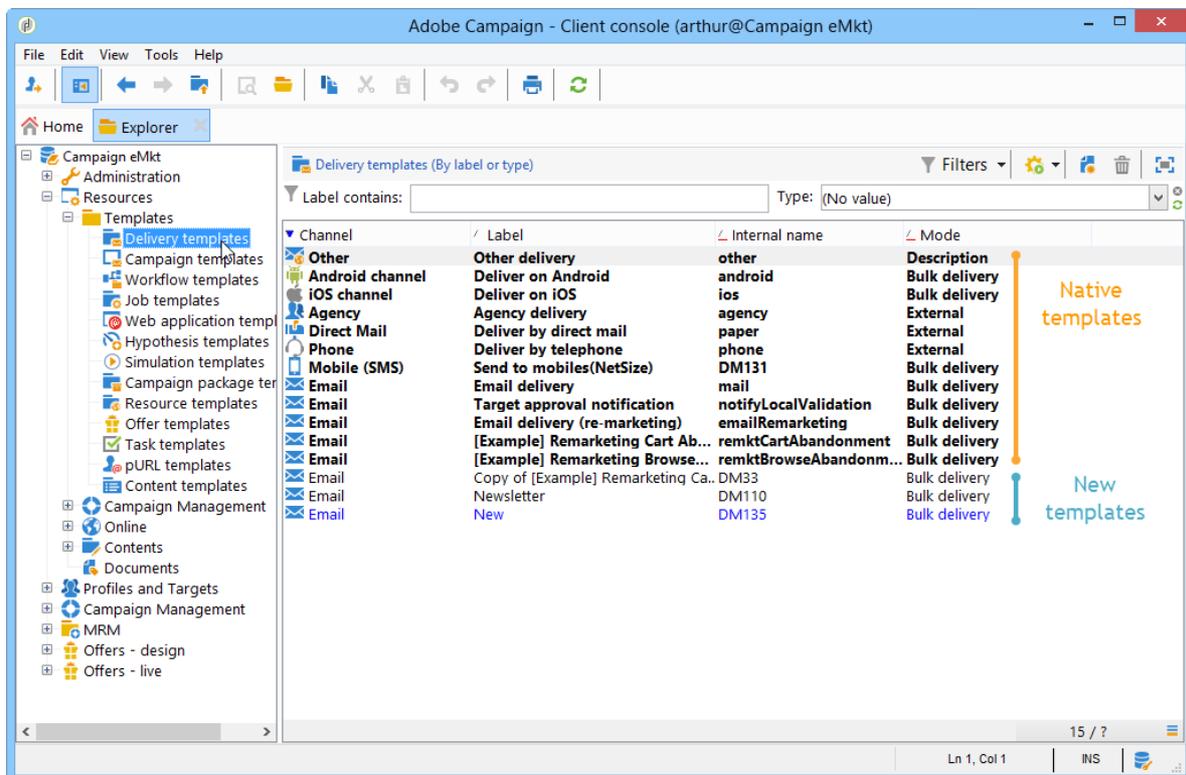
This video presents the key concepts of marketing campaigns.

Additional Campaign Classic how-to videos are available [here](#).

1.6 About templates

A delivery configuration can be saved in a delivery template in order to be re-used. The template may contain a complete or partial configuration of the delivery.

The delivery template may be executed manually, as described in this chapter, or according to an event (launched at a set time, on arrival of a file at a server, etc.). Delivery templates can be configured via the **Resources > Templates > Delivery templates** node in the tree.



There are two types of template:

1. Adobe Campaign native delivery templates

Native templates **MUST NOT** be deleted from the system. They include a minimum configuration for each delivery channel. The administrator can, however, restrict certain functions or offer default values to users (tracking activation, sender email addresses, etc.). Native scenarios appear in bold in the list of templates. They must be duplicated in order to modify them.

2. Predefined delivery templates

The Adobe Campaign administrator can create new delivery templates. They can be reused by operators (those with suitable access rights) or automatically by server processes. For example, you can configure an email delivery template, and when users create a delivery using this template, they simply need to enter the text or HTML content and then deliver it; the other choices have already been defined by the administrator.

NOTE

The available templates depend on your access rights, on your instance configuration, and on the context. For instance, when you create an information service, you can link a delivery

template for confirmation messages: you may then only access the templates whose target mapping is the subscription mapping. For more on this, refer to [Select a target mapping](#) and [Services and subscriptions](#).