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# Unleash the Power of Your Platform

Driving Transformation with  
Adobe Experience Cloud



WILLOWTREE®  
a TELUS International Company

# A Note From *Mike Colombo*



**MIKE COLOMBO**

Chief Marketing Services Officer  
WillowTree, a TELUS International  
Company

## Get Your Ferrari Out of the Garage

Congratulations. If you're reading this, you've either invested in the **Adobe Experience Cloud** marketing stack or are about to do so. That positions you on the cutting edge of marketing and means your marketing organization can be one of the elites in the field.

Your Adobe tech stack – built around the all-important content management system cornerstone Adobe Experience Manager Sites – has the firepower for the most advanced marketing functions the field has ever known. You now have the foundation to smoothly adjust to and capitalize on customer expectations today and tomorrow while ultimately transforming your organization.

But only if you know how to extract optimum value from your Adobe solutions.

That's why we've created this eBook: to help you take the next step with the most powerful and reliable marketing tech stack on the planet. And the next step. And the next.

This requires understanding what works with Adobe and what doesn't; how to customize the tech stack to your exact needs and the needs of your customers; how to build the right culture around it; and what's on Adobe's roadmap for the future. I've seen many situations where an organization purchased this Ferrari of a marketing solution but never drove it out of the garage. You need a strategy and a roadmap to unleash its power and start winning races. And that's what this eBook provides.

Whatever your mix of Adobe products, whatever the load you're asking them to carry, and whatever the outcomes you want to drive, there is a road for you. And this eBook is the perfect starting line.

Let's get started.



# So, you bought the thing.

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You bought a bunch of things – a comprehensive suite of Adobe applications, platforms, and services that, in combination, promise to manage and analyze the end-to-end customer experience.

Maybe you started with Adobe's foundational setup – their CMS, DAM, analytics, and personalization solutions.

Perhaps you've already expanded and invested in additional products across Adobe Experience Cloud, Adobe Customer Journey Analytics, or Adobe Experience Platform – including Adobe's Real-Time CDP, plus Adobe Commerce, Adobe Campaign, Adobe Journey Optimizer, Adobe Marketo Engage, and Adobe Workfront.

If you've got each of these pieces stood up, fully optimized, and seamlessly integrated into a complex yet elegant puzzle... massive congratulations. You're already a rockstar and can probably teach us a thing or two.

On the other hand, if you're just getting started in setting up Adobe Real-Time CDP, for instance, you might want to **check out our intro eBook:**



10 Steps to  
Launching  
Adobe CDP

## The Starting Line.



If you're somewhere in the middle of "just getting started" and "fully optimized," this eBook is for you.

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Maybe you have the basics of your Digital Foundation in place, anchored by Adobe Experience Manager. **The next evolutionary step is to start segmenting and personalizing your omnichannel experience.** That's where the magic of Adobe Experience Cloud truly comes into play.

Because the truth is, it's no longer good enough to simply deliver content on a modern platform. To be a leader in digital experience, you need to focus your operation on delivering world-class personalization at scale.

When Adobe commissioned a study to analyze the potential ROI of using Adobe Experience Cloud, Forrester Consulting determined that "organizations experienced benefits of \$32.5 million over three years and an ROI of 250%." These numbers make it worthwhile to invest time in unlocking the fullness of Adobe Experience Cloud.

This guide will demystify Adobe Experience Cloud and help you extract the total value of this highly complex yet powerful platform.

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**WillowTree** is a proven specialist in Adobe Experience Cloud, with over a decade of experience migrating and implementing Adobe solutions for our clients. This guide will demystify Adobe Experience Cloud and help you extract the total value of this highly complex yet powerful platform. Our goal is to take you from simply "delivering content" to unlocking the platform's advanced marketing and eCommerce tools to drive organization-wide transformation.

Let's get into it.





In this guide,  
*you'll learn:*

- 05 Part 1: Connect Your Teams & Tools**  
An overview of Adobe Experience Cloud solutions to help you clearly define your digital roadmap and realize the full potential of your platform

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- 25 Part 2: Captivate Your Customers**  
How to start building for scale immediately with a modern headless approach to your Adobe architecture

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- 39 Part 3: Control Your Destiny**  
Affecting cultural change and providing your teams the building blocks to scale world-class experiences at increased velocity

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- 57 Adobe Experience Cloud Checklist**  
A step-by-step roadmap for success

# Connect Your *Teams & Tools*

In this section we'll cover:

- **Why Invest in Adobe Experience Cloud?**

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- **What Does What**

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- **Why You Need a CDP**



**If you're a regional U.S. business with a three-person, co-located marketing team**

creating basic web and social content for a specific target audience, you likely don't need all the firepower that Adobe Experience Cloud is packing.



**If you're a multinational corporation with a distributed MarTech team**

managing omnichannel content and workflow for multiple brands in multiple languages, reaching a diverse set of audiences, Adobe Experience Cloud may be tailor-made to relieve your worst headaches and improve your bottom line.

Put simply, Adobe Experience Cloud is an incredible tool for organizations managing large-scale and global complexity across dozens or even hundreds of digital properties.

After you've determined that Adobe Experience Cloud is right for your organization, the next step is understanding that the relief and ROI offered by the platform only occur after a little upfront elbow grease.

## Why Invest in Adobe Experience Cloud?



## What Does What.

### Let's first address the obvious:

Adobe Experience Cloud is big, and it's complicated. It's not a single, multifaceted application – it's a flexible set of about 10 unique solutions within the same ecosystem powered by a central **customer data platform (CDP)**.

If these puzzle pieces are appropriately integrated and optimized, they will undoubtedly create efficiencies across content and asset management, unify your commerce experience across all channels, and segment audiences while activating customer profiles for real-time personalization.

But sure, that's a big "if."

Some of these products are proprietary Adobe software. Others were acquired and rebranded. Some products overlap with others in terms of redundant functionality, and there are probably 16 different ways to accomplish each critical task. It's about knowing more than what each product can do.

Connecting Adobe Experience Cloud to a focused vision for what you're trying to achieve means first understanding which application works best for each need, and how to limit redundancy, confusion, and rework.



Adobe Analytics

Adobe Campaign

Adobe Audience Manager

Adobe Commerce

Magento Open Source

Adobe Customer Journey Analytics

Adobe Experience Manager

Adobe Journey Optimizer

Adobe Target

Adobe Workfront

Adobe Marketo Engage



These Adobe products are so vast and capable that with any of them, it's easy to go down this rabbit hole of completely overdoing something or not realizing that there was a much simpler solution native to a different part of the Adobe stack. Adobe Target can create its own segments and track its own events, for instance, it just doesn't do or display that to users as well as Analytics. **There is a little overlap between these connected products, but each has its own area where it shines."**

**Alex Rodrigues**

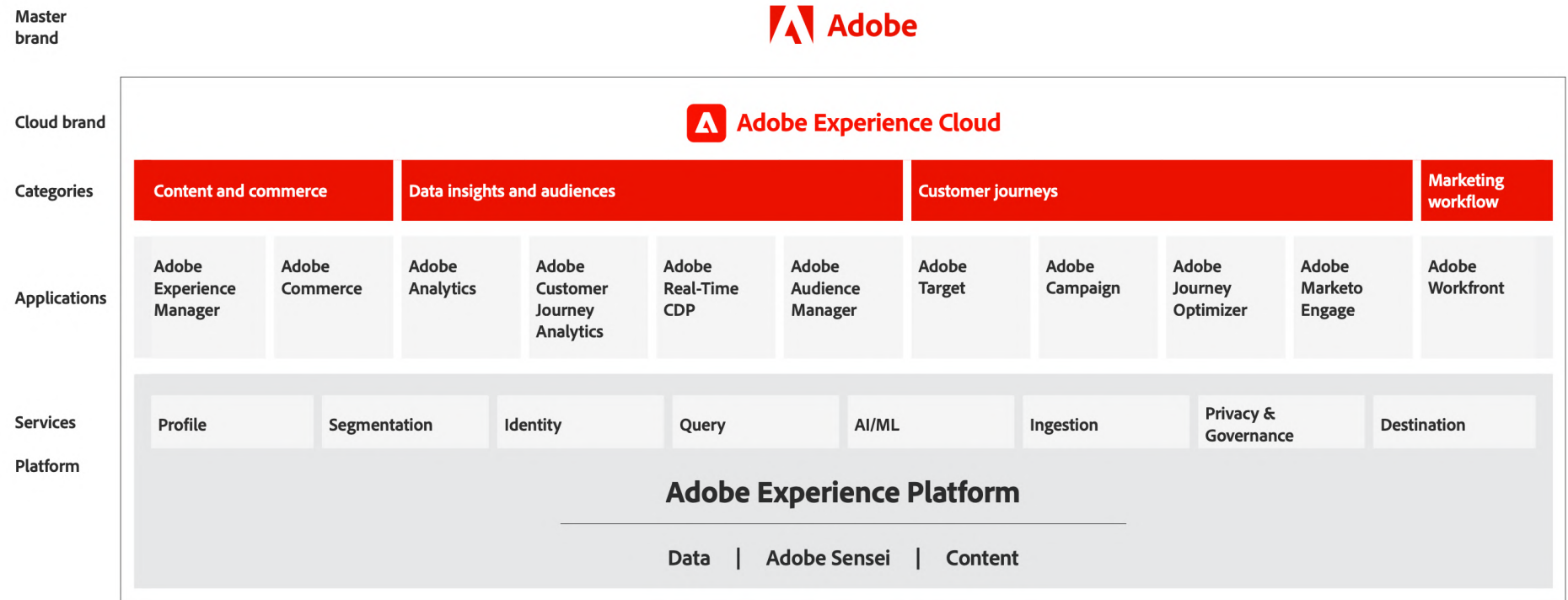
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# Adobe Experience Cloud.

Experience *Cloud*. Experience *Manager*. Experience *Platform*.  
 Magento/Marketo. Analytics vs. Customer Journey Analytics.  
 From a branding perspective, it's a bit wild.

Here's the puzzle box of how it all fits together:



Make perfect sense now?  
 Didn't think so. So let's unpack this...





Adobe Experience Manager is more robust than a basic CMS and also includes:



A **digital asset management (DAM)** system (called **Adobe Experience Manager Assets**) to collect, organize, and add metadata to underlying pieces of content, such as an individual image or video file (imagine a global fashion brand generating thousands of product photos every season).

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A **digital forms** product (called **Adobe Experience Manager Forms**) to capture and manage customer information (imagine an insurance company coordinating extensive documents with millions of individual customer-input fields across multiple languages).

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A **digital signage** product (called **Adobe Experience Manager Screens**) to publish static and interactive content onto public-facing screens in physical venues (imagine a multinational coffee franchise updating digital menus across thousands of locations or a Vegas casino cycling through wayfinding, advertising, information and ambiance visuals on hundreds of screens throughout a single property).

*NOTE: We never like to assume prior knowledge, so we'll do our best to explain specific acronyms and generally get a little rudimentary to level-set and ensure we're all speaking the same language.*

## Adobe Experience Manager.

Adobe Experience Manager is Adobe's **content management system (CMS)**, the core product used to build the infrastructure of a website and manage its customer-facing content with a relatively low coding effort.



**Adobe Experience Manager serves as a middleman between web developers and content creators.** Those two arms of a business don't always communicate well with each other. What I like about the platform is that it removes the web development side of the process for content creators so they can just focus on their job, which is delivering great visuals and crafting an excellent user experience.”

**Wesley Brett**

MARKETING TECHNOLOGY CONSULTANT | WILLOWTREE



Since many companies are just starting their journey – looking into new technology to power their digital transformation – Adobe developed a **Digital Foundation** suite, which includes critical parts of Adobe Experience Manager (its CMS and DAM), plus **Adobe Analytics** and **Adobe Target**, all rolled into a single offering.

**Adobe Analytics** is Adobe's mobile and web analytics solution. It competes with products like Google Analytics 4 (GA4) to aggregate and offer insights on data throughout the customer journey.

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**Adobe Target** provides off-the-shelf, data-driven analytics that drive A/B testing, omnichannel personalization, and automation at scale (this is where content and data come together to deliver real-time personalized experiences).

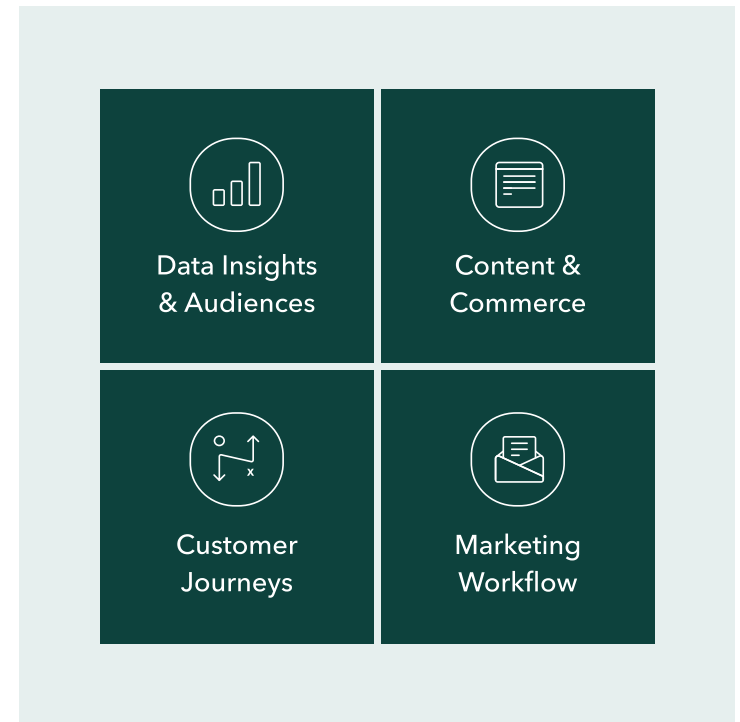


Digital  
Foundation.



## Beyond the Foundation.

Going back to Adobe's puzzle box graphic, let's look deeper at these four categories:





## Data Insights & Audiences

While Adobe Analytics focuses on web and mobile data, **Adobe Customer Journey Analytics** also includes offline data, such as information gathered from call centers or brick-and-mortar locations, which is often helpful in customer acquisition.

**Adobe Audience Manager** is a nearly obsolete data management platform swiftly being replaced by...

...**Adobe Real-Time CDP**. The CDP sits at the core of all applications and is the next-generation tech that allows Adobe applications to personalize in real time based on centralized marketing decision-making.



## Content & Commerce

**Adobe Commerce** is a rebranded Adobe acquisition and a leading eCommerce platform for B2B and B2C storefronts.



## Customer Journeys

**Adobe Campaign** provides marketing automation and email campaigns primarily for B2C (commodities/products and transactional types of sales).

**Adobe Marketo Engage** offers similar marketing automation and email campaigns for B2B (lead generation/nurturing, a consultative, slower-burn type of sell).

**Adobe Journey Optimizer** is Adobe's next generation of email marketing automation. The platform is natively built on Adobe's CDP, which gives marketers real-time access to a centralized data model.



## Marketing Webflow

Finally, we have **Adobe Workfront**, another recent acquisition, and Adobe's robust project management solution optimized for content and marketing teams.



Looking at the whole Adobe package, the benefits for one of our clients is that they're working at scale, trying to manage 20 or 30 complex websites across the globe. Some content and data need to be shared among these sites, and some don't. When you add on the notion of eCommerce capabilities with different languages and personalized experiences, **Adobe Experience Cloud** excels at running that enterprise-level shop and making it much more manageable for the humans involved."

Alex Carr

CHIEF DESIGN OFFICER | WILLOWTREE





## Adobe Real-Time CDP is the centerpiece of Adobe Experience Cloud.

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If you're this deep into the Adobe ecosystem – or into reading this eBook – you've likely heard about **the customer data platform (CDP)** and may have deeper knowledge of the problems it solves. But hey, the CDP is vitally important to how the Adobe tech stack functions, so let's level-set with this quick primer.

The CDP is essentially the underlying technology that acts as a hub for all customer information – across multiple channels and platforms – ultimately driving easier integration, segmentation, and personalization of marketing content.

## Why You Need a CDP.

## Our goal is to deliver the **right message** to the **right customer** at the **right place** and **right time**... right? That's Marketing 101.

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So let's consider the different interactions a brand might have with a customer (the multiple times and places a message might be delivered).

### Historically...

these touchpoints were mainly physical/in-person (brick-and-mortar) and via out-of-home/broadcast advertising (billboards, television commercials). It wasn't easy to track.

### More recently...

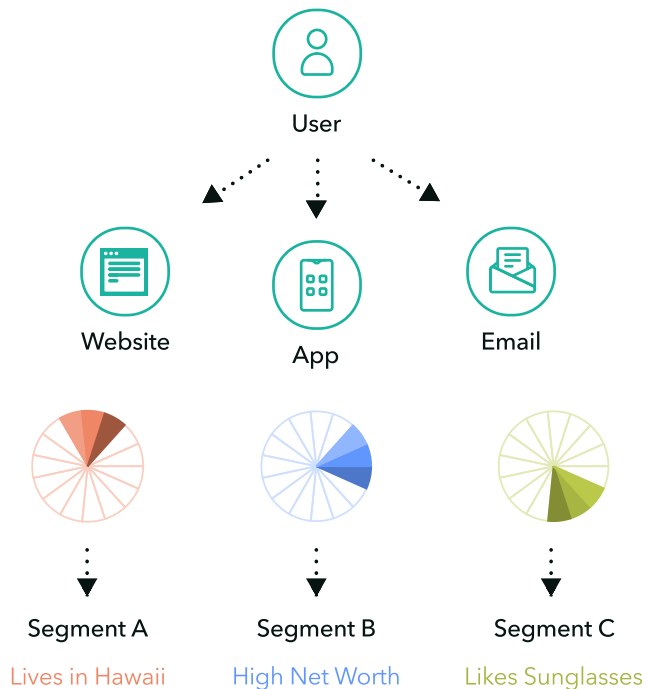
these interactions extended to a limited number of digital touchpoints (website and email), which were easier to track and analyze.

### And now?

Companies have web, email, apps, paid media, social media, CRM, eCommerce, in-person and virtual events, just a massive number of interactions a customer or user might have with a brand. To add to this labyrinth, people are interacting in these ways across multiple devices – one individual might connect with a brand in different ways through their mobile, tablet, laptop, and wearable devices.

## Marketing Problem

Data Silos = Fragmented Profile



## The problem is, there's no real consistency.

The point of a CDP is to take all those data silos spread throughout different parts of the business, house that data in one centralized location, and **attribute that collected data to a single person**. Sounds simple, but the technical aspects behind doing this are quite complicated.

People behave differently on different applications (you might speak to your best friend differently than your mother-in-law), and brands gather different information about people in these different settings. If a brand only looks at a limited snippet of information from a single data silo, we might infer an incorrect marketing decision based on that incomplete information.

In terms of different pieces of data, consider that a conversation over **email** yields an email address and one piece of information (maybe a user clicked on an offer for sunglasses); a **website** visit might use cookies to determine a device IP address and their geographic location (they live in Hawaii); **app** usage might help us assess something more about the person's background (they're a high-net-worth individual).

What we have here is a fragmented customer profile based on data silos. We might end up recommending swimsuits on the website (assuming they **live in Hawaii**), increasing all product prices on the app (assuming **high net worth**), and offering steep discounts on sunglasses via email (assuming they're **shopping based on price**). These are inconsistent and potentially incorrect assumptions based on a disconnected understanding of our customers.



## Connecting the dots.

How do you then connect that person's email address to their geo-location to their app behavior in a centralized place? How do you continue to make these connections as we imagine that same person using multiple devices (phone, tablet, laptop, etc.) across multiple platforms (social media, apps, etc.)? That's where CDPs come in.

Using something called "**identity resolution**," CDPs can roll up all that data and attach it to a single person, giving us a 360-degree view of an individual customer so that brands can have more consistent conversations with them.

We now know this person lives in Hawaii and is shopping for warm-weather garments and accessories, but is unlikely to purchase strictly based on price. Instead, she might be more excited to engage with the brand if they send her a personal invite to a VIP fashion event in Hawaii. We combine everything we know to make more informed decisions about communicating with this individual customer. That's the concept of CDPs.

This personalization has always been the goal of marketing. The technology has finally caught up.





Companies have been using CRMs as a customer database, but this is swiftly becoming legacy technology for two main reasons. First, CRM databases are not real time; second, the database is traditionally managed by IT-based teams who need to be trained to respond to these kinds of market events. **CDPs bring advanced technology into the hands of marketers who can capitalize on insights more quickly and creatively."**

**Wesley Brett**

MARKETING TECHNOLOGY CONSULTANT | WILLOWTREE



## The Problem of Integration.

If getting a 360-degree view of your customer is one massive benefit of CDPs, another significant advantage lies with **integration**.

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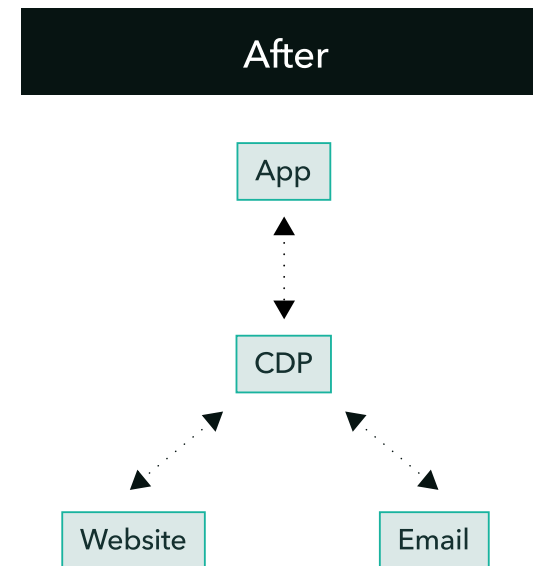
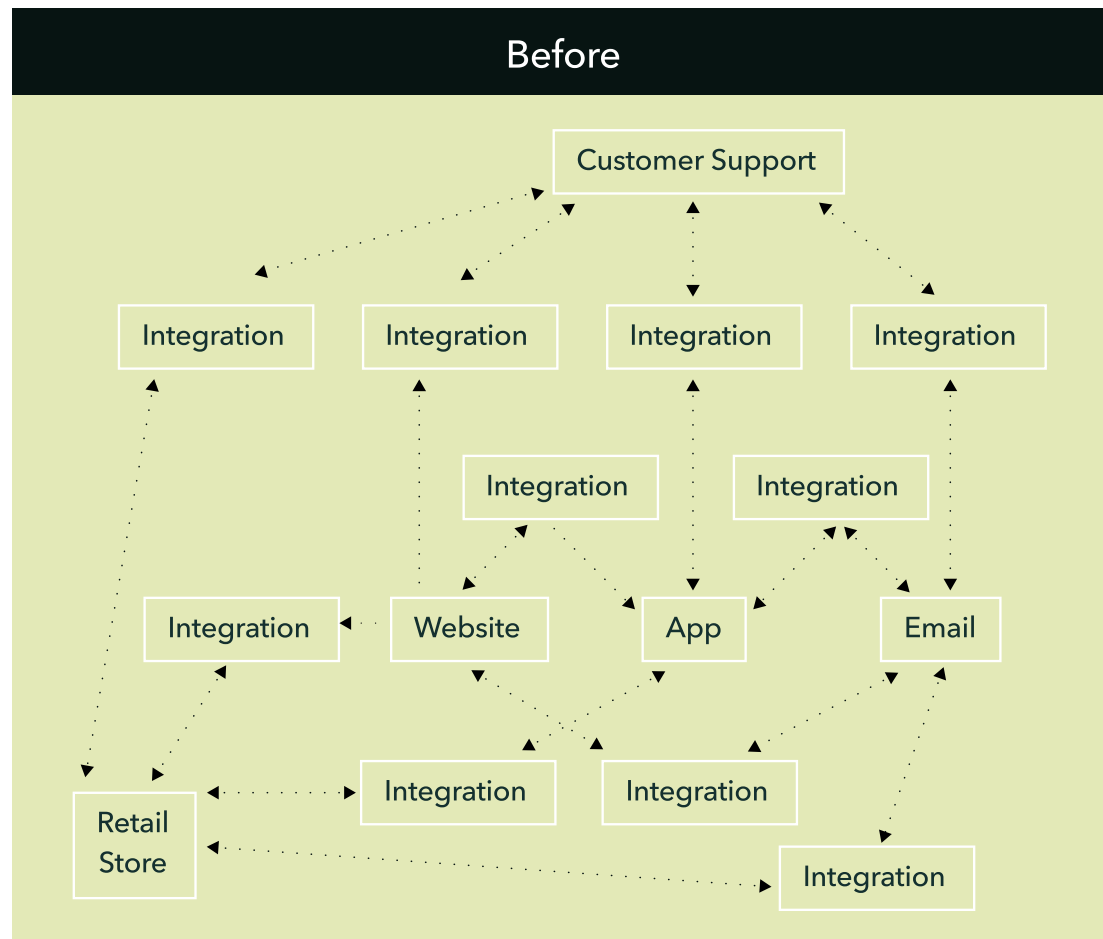
Over the last five or ten years, platforms typically integrate using an **application programming interface (API)**. This integration can get unwieldy. A company may have done the work to integrate their website with email, their mobile app, their CRM – each with individual APIs – but if you want to add a new channel (integrating a brick-and-mortar store, for instance), it's highly challenging: now you need to integrate everything with everything else, creating an exponential uptick in API integrations. Pretty soon, your neat framework looks like a conspiracy theorist's mad ravings.

With CDPs like the **Adobe Real-Time CDP**, we've essentially put a powerful piece of technology right in the middle of all of this, which we can view as a source of truth to represent an individual in data form.

And if we want to introduce a new channel – data from that VIP fashion eyewear event in Hawaii, for instance – rather than integrating that marketing event with a dozen other silos, we simply connect it to the CDP.

This data can now be added to the individual's profile and shared with the entire organization in real-time.

The CDP thus becomes the stable core of the business, holding all of that marketing intelligence and process in one place.





## What Adobe Experience Platform is Doing.

Finally, a third key advantage of a CDP is this real-time, 360-degree view of the customer, allowing us to **build effective market segments**.

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**As marketers in today's digital landscape, we need to:**

- Collect data
- Store data
- Analyze data
- Create market segments
- Make centralized marketing decisions
- Execute campaigns in marketing channels

Marketers typically use a customer's attributes and events to build a segment. Many companies use numerous systems to collect data, store data, run analytics, etc., at the expense of centralized marketing decision-making.

With CDPs, centralized marketing can be controlled by a team of campaign managers making segmentation decisions impacting the enterprise.

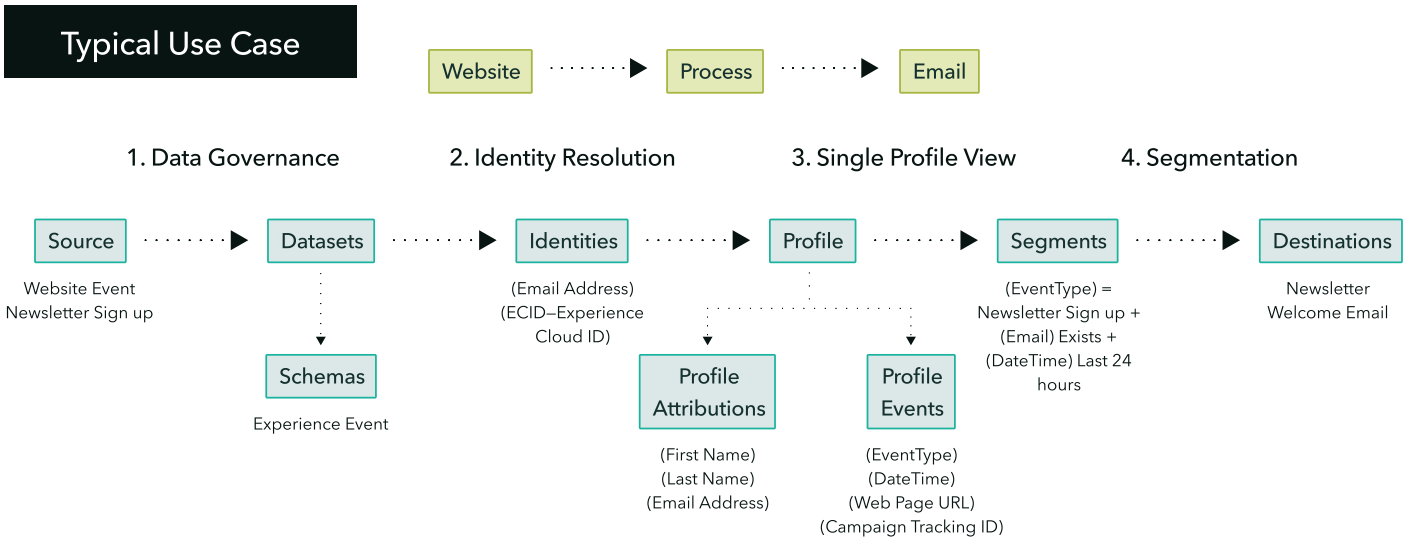
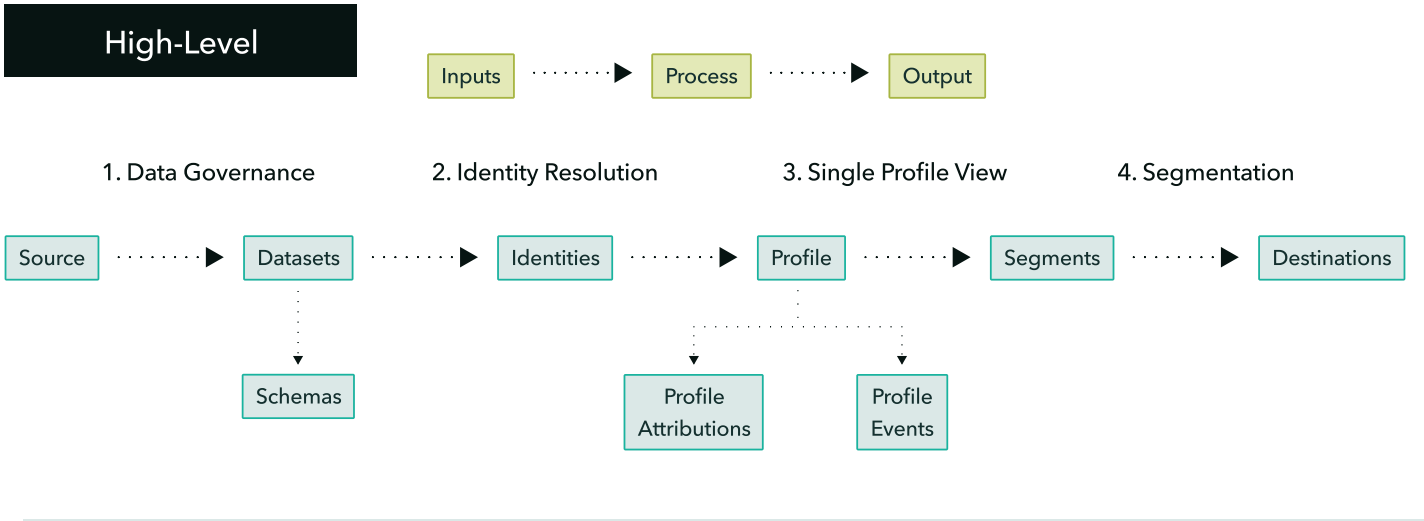
**They can define an audience** based on the data they've collected and analyzed, identifying customers at risk of churning, for instance.

**They can push that audience** to the email team, paid media team, call center team, etc.

**They can execute consistent campaigns** to reach the right people, with the right message, at the right time.

**That's the power of a CDP.**

# What Adobe Experience Platform is Doing.



# Captivate Your *Customers.*

In this section we'll cover:

- **What is MACH Architecture?**

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- **Design Systems as a Service**

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- **Personalization as a Service**

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- **eCommerce as a Service**

Having worked with many clients to migrate to the Adobe tech stack, we know that re-platforming can be challenging. Many of them have legacy CMS systems, for instance, and are initially looking to migrate from something like WordPress to a more powerful tool like Adobe Experience Manager.

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While re-platforming your CMS can be an essential first step, we encourage our clients to think of a move to Adobe Experience Manager as more than a stop-gap solution for the web. When properly optimized and leveraged, the broader Adobe stack can be a fundamental driver for innovation across their business.

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This kind of move can be daunting, no doubt, and may require a massive leap of faith and commitment to the Adobe ecosystem. However, this all-or-nothing mentality is a myth and why we typically recommend thinking of Adobe Experience Cloud with the principles of MACH Architecture in mind.

# Captivate Your *Customers.*



## What Is MACH Architecture?

Technology changes at blazing speed. If you've been around long enough, you've likely found yourself hamstrung by one piece of outdated technology. Replacing it sometimes requires a much more extensive and more costly re-platforming of a half dozen associated solutions now also obsolete.

MACH allows organizations to add, remove, and alter individual pieces of technology without the need to holistically re-platform.

MACH stands for:

- **Microservices:** independent, targeted technologies that can be bolted onto an existing framework
- **API-First:** using APIs to enable new technologies to access CDPs and underlying content/data across all platforms
- **Cloud-Native:** decentralized storage, hosting, and scaling that eliminates the need for regular manual upgrades
- **Headless:** separating the back-end development from the front-end UX

We have many clients migrating to Adobe Experience Manager as a cloud service, and we recommend deploying MACH Architecture in almost every instance.



MACH is a modern, scalable, innovation-ready architecture. Digital velocity is real, and **businesses who cling to legacy technology and architecture because they fear the cost or process of re-platforming will soon find themselves left behind.** MACH Architecture can solve most pain points and ensure the freedom to implement continuous improvement well into the future.”

**Mike Colombo**

CHIEF MARKETING SERVICES OFFICER | WILLOWTREE



## Delivering Adobe Experience Manager Headless.

So, all good in *theory*, but what does applying MACH Architecture to Adobe look like *in practice*?

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To illustrate, let's focus on one aspect of the Adobe stack (specifically, **Adobe Experience Manager**) and one aspect of MACH Architecture (let's go with the H: **headless**).

Again, by going headless, we're separating **front-end authoring** from the **back-end configuration**. Companies could deploy Adobe Experience Manager as a traditional WYSIWYG content management system – working in templates, dragging and dropping various components – but to drive more value and efficiency across the enterprise, a MACH deployment treats Adobe Experience Manager as more of a content service.

Rather than taking your existing authoring components or design system and simply building an Adobe version of a website (or, likely, many sites), a headless approach would entail building your **single-page application (SPA)** as the front-end and then leveraging Adobe Experience Manager in the back-end. Your SPA Editor becomes an accelerator for a high-fidelity interactive experience, while Adobe Experience Manager becomes your omnichannel content solution.

**Have we lost you?**

Okay, let's try this instead.





Let's say you're managing a large-scale design system across **multiple websites** (could be 10, 20, maybe hundreds) in **numerous countries** and **multiple languages**.

The ultimate goals here would be to:

- maintain **consistent branding** and user experience but...
- allow marketers the freedom to **segment and personalize** content, all while...
- decreasing **design and development time** and, therefore...
- increasing **speed to market**

Delivering Adobe Experience Manager headless offers a novel way to achieve this consistency, personalization, efficiency, and speed.

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**Design  
Systems as  
a Service.**



## PART 2

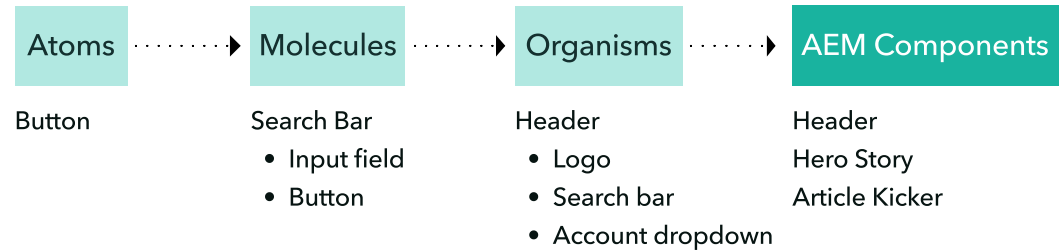
Internally and on the back end, designers and developers create what's typically known as an **atomic design system**.

This starts with...

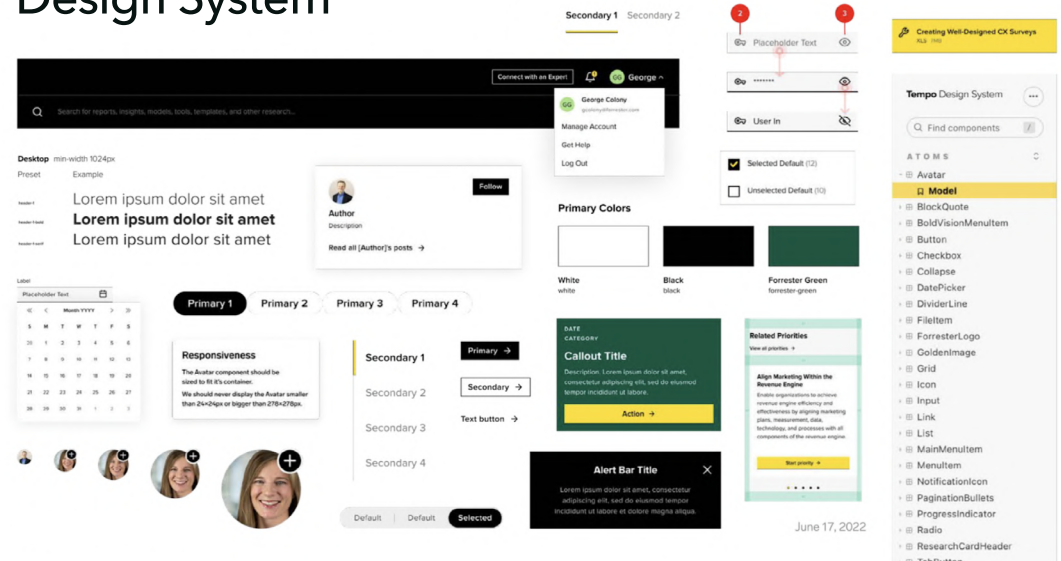
- **Atoms:** the colors, typography, gradients, and rollover characteristics of something small, like a button, which might be used independently or become part of a larger...
- **Molecule,** like a search bar, which includes that button plus an input field, and itself becomes part of a bigger...
- **Organism,** like a page header, which includes that search bar plus various company and social media logos, and an account dropdown menu. Rather than manipulating these back-end Organisms, Molecules, and Atoms, content authors can instead work with...
- **AEM Components,** which are customizable, higher-order sets of elements. Designers can work with smaller components to build pages to exact standards, while marketers needing to launch a story quickly can create a best-in-class branded experience with just a few larger components.

## Historically Design Owned/Used

## Customer Enablement



## Design System

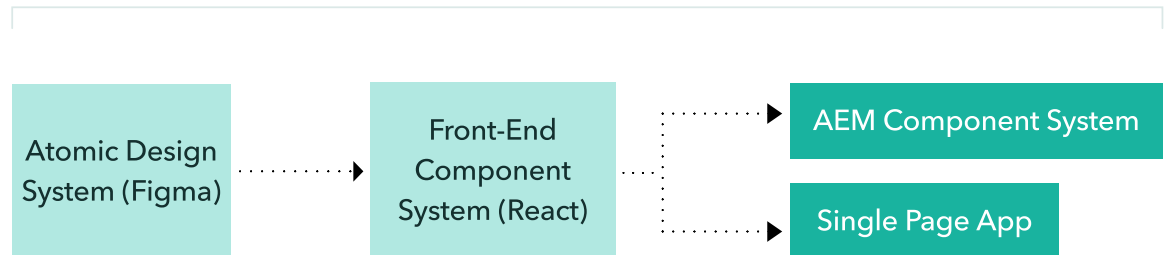


In the headless model, we separate the content from the presentation – decoupling the Atoms, Molecules, and Organisms (the back end) from the Adobe Experience Manager Components (the front end).

- Designers create elements of the atomic design system in a program like **Figma**.
- Developers code these elements in a framework like **React**.

This becomes the “locked” back-end design system shared with front-end content editors and marketers, who then use this as a consistent Adobe Experience Manager Component System or within a SPA Editor to develop and build their pages and tell their stories. If we use that same component on a single-page app experience, we don’t have to remake each piece or build separate, specific, immersive experiences. The same system drives everything, so the front-end components are consistent and reusable.

## Storybook



With headless, we can decouple these as two systems with different audiences and uses. Managing the atomic design system internally allows designers and developers to update any of those components as needed, ensuring consistency of branding and user experience. The AEM Component System can be used by marketers in AEM or non-AEM implementation, like a SPA Editor, so they can move quickly, edit content, and focus on storytelling and personalization.



**We've seen the headless design system provide core benefits to both 'sides.'** From a designer's or developer's standpoint, it's quick to create and deploy a new component. For the content editor, they're not beholden to developers. And because the component system they're using in Adobe Experience Manager is based on an internally branded and approved system, they know they will continually be operating an experience that's best in class."

**Alex Carr**

CHIEF DESIGN OFFICER | WILLOWTREE



Once this Component System exists, we can feel confident that the brand and UX elements that can't and shouldn't change will be consistent. We have the capacity to personalize the elements that can and should change according to who's viewing the page (and the marketing decisions we've made about them based on their CDP).

Now we go beyond Adobe Experience Manager and get further into the data layer and the rest of the Adobe tech stack.

Let's start with **Adobe Target**.

With a design system in place, Adobe Target now becomes **our engine for personalization**. We use Target to create a segment. We then decide what components will be personalized – a banner, for example – which is driven by Analytics and CDP. Users' personalized components are rendered and presented in real time when they visit a page.

## Personalization as a Service.



Adobe Target also connects directly to Adobe Experience Manager in the sense that marketers can create “offers” in Target and share consistently across different platforms.

Based on marketing decisions informed by our CDP, let's say we give a particular user an offer for a \$10 product discount (they've been targeted for this offer based on their segment). We want to ensure this user consistently sees the same \$10 discount across all platforms. In a headless deployment, Target is what ensures offer consistency. And it's decoupled from Adobe Experience Manager, which remains a central source of content creation and editing.

### Each system gets the version of the content targeted to each user segment:

users in segment A see the content targeted to segment A; users in segment B get the content targeted to segment B; and other unsegmented users are shown default content.

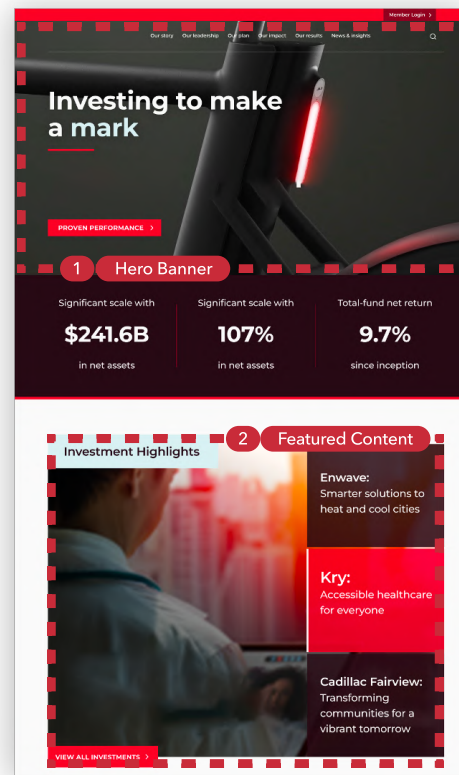
## Prospect Experience



Name: Unknown

Company: Unknown

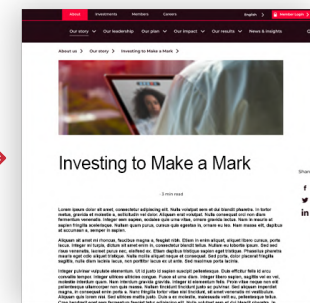
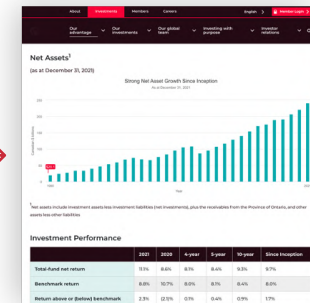
- 1. Hero banner:** Above the fold, we continue to display Company's elevator pitch but add a CTA for the prospect to review your proven track record content.



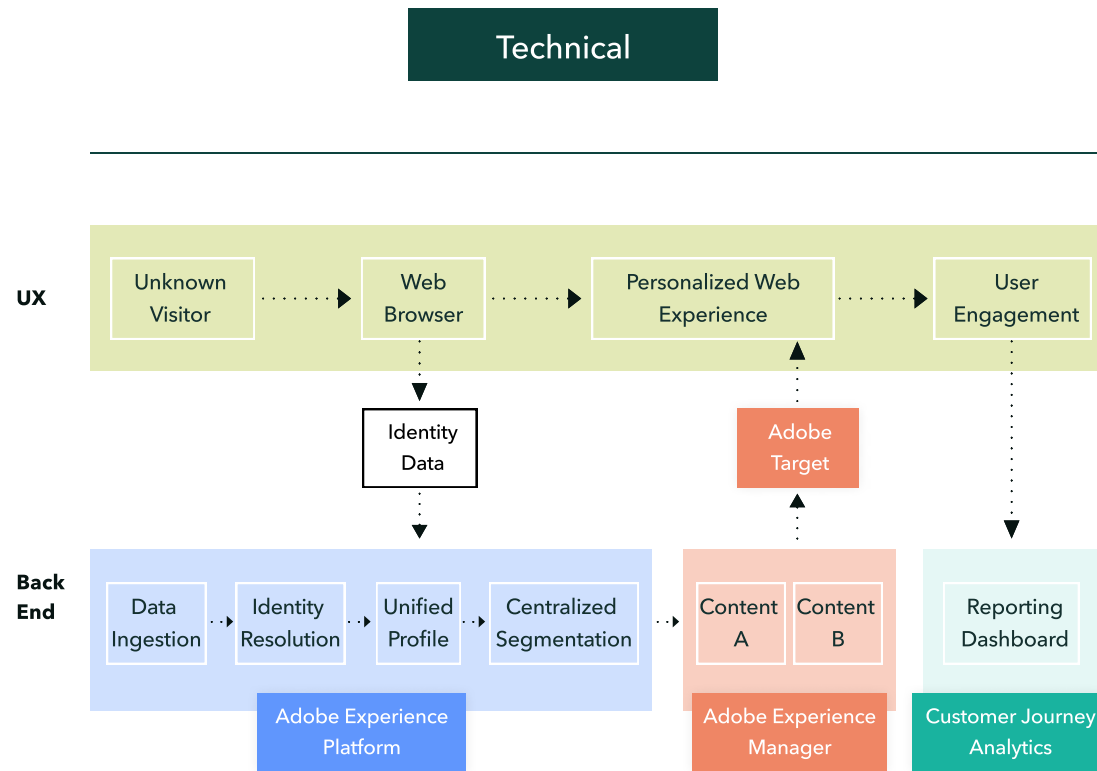
### Scenario

A prospect arrives at the website after clicking on a paid media advertisement.

- 2. Featured content:** Just below the fold, we feature an investment highlights experience fragment, making it easy for the prospect to dive deeper into case studies.







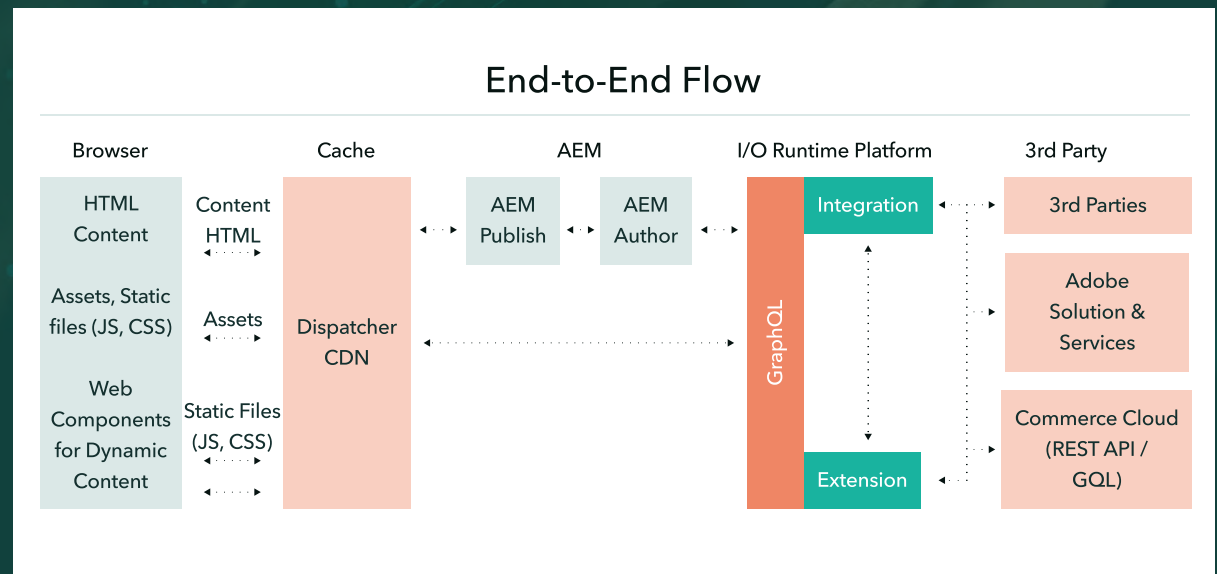
Now that we're executing on this level of segmentation, we need to understand how personalized content is performing, so we can continue to tweak. Enter **Customer Journey Analytics**.

When it comes to analytics, the challenge is the unknown. There are aspects we know we need to track, like Page Views, but the key is identifying and tracking aspects of user activity a client didn't realize they needed to be watching or an element specific to a single user segment.

## eCommerce as a Service.

**Adobe Commerce** (formerly Magento) is our eCommerce solution within the platform, and the headless approach of decoupling the back end from the front end can extend to your eCommerce in similar ways. Adobe Commerce Cloud becomes the back-end system where we manage all our product information. Then, marketers and content editors can pull these products into Adobe Experience Manager and manage all of the content around them within that CMS interface.

In other words, we keep the online storefront in Commerce Cloud while not using any of its front-end capabilities. We can stick with our existing front end. Meanwhile, we're leveraging Commerce Cloud's GraphQL APIs and headlessly serving all of that functionality to our SPA.





Adobe Experience Manager is outstanding. Though it's extensible, in some ways, it has the same limitations as any other CMS. Where the Adobe stack shines is in the connection of analytics to targeting, and all the additional products helping companies understand how people use and respond to what they're putting out in the world. **Adobe Experience Cloud excels at showing us what's performing."**

**Alex Rodrigues**

MARKETING TECHNOLOGY CONSULTANT | WILLOWTREE



# Control Your *Destiny*.

In this section we'll cover:

- **Content and Marketing Operations**

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- **What is Adobe Workfront?**

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- **Affecting Cultural Change**



Okay. Let's say we've worked through the different permutations and now have our digital infrastructure in place.

Maybe it's a core Digital Foundation setup of Adobe's CMS and DAM, Target, and Analytics. Perhaps it's a more comprehensive suite with a built-out data layer.

Everything is connected to your CDP, and you're ready to flip the switch.

---

The machinery is ready.  
Now, the challenge  
is ensuring humans  
are equally ready –  
operationally and  
culturally – to scale these  
world-class experiences  
at increased velocity.

# Control Your *Destiny*.



## Content and Marketing Operations.

This next section is about operations. If we've deployed a modern MACH Architecture and have all this amazing functionality at our fingertips, how do we ensure that we can maintain and leverage the bells and whistles of the Adobe stack and amplify our experiences? And, how can we accomplish this without annoying people in the process?

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Once we start getting into personalization, we're creating a ton of content, and often dozens of versions for myriad audiences in dozens of regions and languages. All of that takes coordination.

## Our operational organization will be driven by how we want to leverage data in the content creation and editorial processes.

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For instance, with products like Customer Journey Analytics, we can seamlessly integrate this data and enable different content authors to understand what is and isn't resonating and performing with users.

Doing this well – and, again, ensuring consistency of understanding and use across a large, far-flung team – is easier said than done.

How do we go from an idea, to a published content piece, to an effective marketing instance? With so many different products at hand, is that still a linear process? Or, is it a multi-pronged, 360-degree set of tasks all happening in tandem? Where do we involve SEO? Where do we involve social? How, exactly, does all of this come together?

**The answer: it's all about workflow.**

Understanding  
and Interacting  
with Data.



In establishing a modern content operation, we often get asked how media plays in and out, how to derive the most value from analytics, where to see a single view of a content piece, and how to make this overall operation hum. **Creative workflow and asset/data management become the critical drivers of success here, and that's about people.** We need to ensure that everyone is educated, supported, and getting the most out of the technology.”

## Mike Colombo

CHIEF MARKETING SERVICES OFFICER | WILLOWTREE





To help manage this workflow – and, more importantly, the people behind it – Adobe has one more powerful tool: **Adobe Workfront.**

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Workfront is a comprehensive project management software managing the end-to-end experience: intake, resource planning, automated workflows, distinct task attribution, cross-functional collaboration, creative execution, reviews, approvals, delivery, and publishing – all the way through productivity analysis and reporting.

Large enterprises with robust content operations know that they're producing large volumes of content – spanning web, email, social media, and long-form thought leadership – created and managed by teams that might number in the hundreds or even thousands of employees (especially when the business' value proposition is content creation).

Add to that the complexity of far-flung, remote workforces, often operating in dozens of regions or countries. Getting everyone organized along a seamless process from ideation to publication can be a massive challenge.

Workfront manages the process but, as importantly, integrates with the entire Adobe ecosystem – as well as the **Adobe Creative Cloud**. This integration ensures that our strategists, designers, creatives, marketers, and executives have a clear view of the tasks in their queue, the assets and creative components at their disposal, and the real-time status of reviews and approvals.

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Despite the technology, everything in the Adobe ecosystem requires humans. Workfront is made for the human operations space.

## What is Adobe Workfront?

## Adobe Workfront as an Integration Hub.

### Let's look at Workfront in action.

Workfront's integration with Adobe Experience Manager Assets, for instance, enables teams to get image assets into production channels, sharing and updating as new revisions or events occur.

Let's say a marketer requires a new email campaign for a recent market change in their industry.

#### For example:

- A new blockbuster film features a wild action sequence in a hot air balloon.
- As a result, hot air balloon shows start blowing up nationwide.
- Suddenly, the marketer's process for printing giant balloon-sized ads fits perfectly with this new trend.

That insight can be fully managed and executed within Workfront. It goes something like this:

1

The marketer fills out a custom form hosted on Workfront that allows them to provide the business case – ROI, expected costs, etc. – and all the details necessary for the creative team to execute.



2

The urgency and timeline are specified in the request, which gets a fast-track approval workflow so leadership can quickly approve with a simple link in an email.

3

Once approved, the request is routed to the PMO for resourcing and assignment. In this case, the balloon show season only lasts for another two months, so this campaign needs to go out quickly.

4

The CMO has added this project to her strategic goals dashboard in Workfront and can track its progress and monitor its status by subscribing to updates.

5

The assigned project manager (specified by the request routing configuration in Workfront) converts the request to a templated "New Campaign" project with two clicks. In this case, resourcing needs will automatically populate as pre-specified role assignments for this project. Now we simply need to assign people to the needed roles.

6

Once the request is converted into a project, the resource manager is also notified via a Slack connector powered by **Workfront Fusion**. The resource manager can see that the project sponsor is the CMO, and the urgency is "High," so this project may require some resource shuffling with other projects. Enter the **Scenario Planner** in Workfront.

7

The resource manager can use the Scenario Planner to understand which other projects might suffer the least if top design talent is reassigned to this new campaign. Using the **Workload Balancer** in Workfront, the resource manager can assign all tasks in one motion, cascading changes across all dependent projects or tasks.

8

Once the project is resourced, the project manager sets the status to Active, and the team is off and running on the new campaign.

9

Kickoff meetings and project brief templates are baked into the project template, so important meetings and documentation are included despite the quick, automated action.

10

Adobe Experience Manager Assets are available for the creative team to use, and the original custom form filled out by the marketer includes examples of past campaign artifacts they'd want to use as a starting point.

11

The designer doesn't need to leave Adobe Photoshop. The Workfront integration lets them to see the assigned task and any attached documents. They get working on the request immediately.

12

Once editing is complete, the designer can upload their file directly to Adobe Experience Manager Assets as a proof, with a preconfigured workflow that includes approvers from creative and marketing.

13

Notifications of approvals or edits are surfaced in the Slack channel created automatically when the request was converted to a project. Once approved, the DAM asset can be accessed by any channel team member to use in the campaign.

14

Once the campaign is complete, the project manager can provide any necessary updates to the project update stream for review by the CMO and leadership team.

15

All time spent is logged for each task. Operational details of the project are pushed directly to the dashboard of the executive team. The operational data is then integrated with the campaign's performance metrics via Workfront API so the complete picture of the campaign's success can be easily digested.

16

The project manager performs appropriate closing tasks for the project, and automations configured in Workfront Fusion perform the corresponding closing tasks like archiving the Slack channel.

We can add third-party plugins and integrations (such as Hootsuite, which can pull assets straight from the DAM to alter creative and post to social), but asset management and workflow remain centralized.

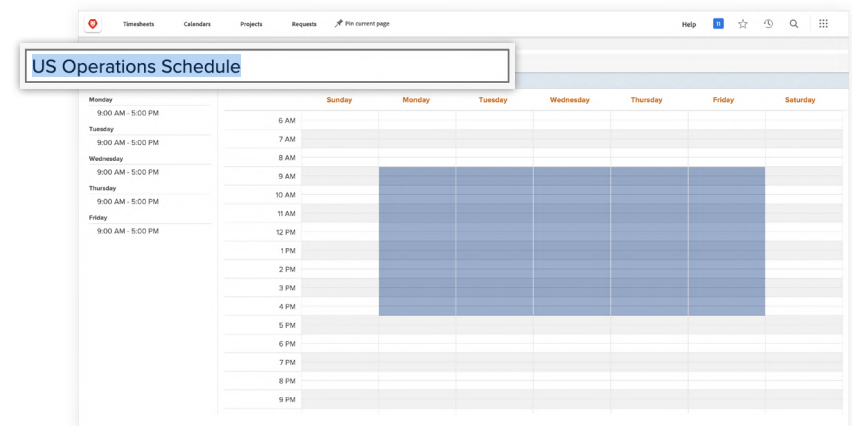
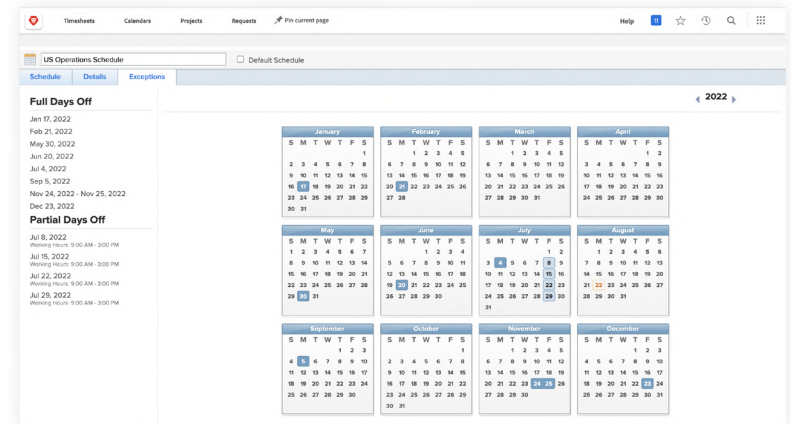
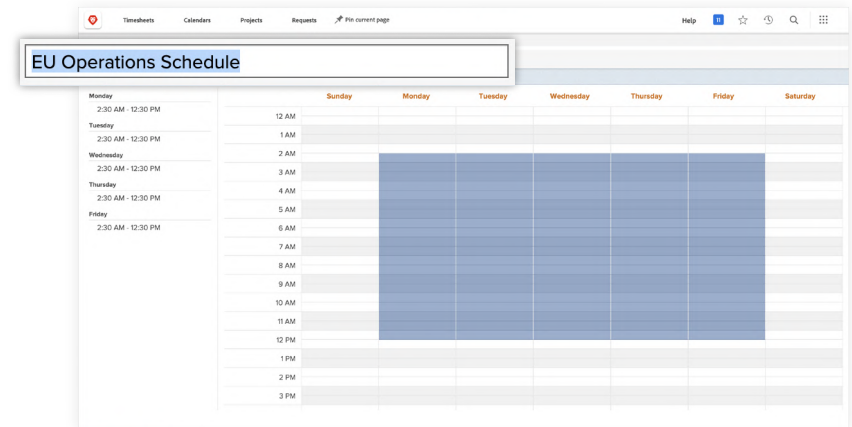
## Workfront for Global Teams.

Another excellent example of where Workfront shines is with multinational enterprises and **managing global resources.**

Utilizing resources with different time zones, national holidays, or office hours is a struggle for delivery teams across enterprise locations. Plenty of leaders need help with the associated challenges.

Workfront is ready to meet this moment with the ability to create multiple schedules in different time zones and enable separate time-off calendars based on group configurations. These settings, combined with request routing, give the enterprise an “always-on” capability, offering requestors access to active resources around the clock.

Add on the layer of integrating with back-office HR systems that manage time-off approvals (these can be managed in Workfront, too), and you have all your resource constraints (and opportunities!) on a single platform.





**Setting up Workfront is all about understanding how your content teams work.** If the structure doesn't align, we'll need to reorganize everything at some point, which can be difficult — especially when teams are already working in a faulty system. Content has to be reorganized, linkages reconnected, sites recreated, and hostnames changed. It's one of the big mistakes organizations make, and it's easy enough to avoid this mistake with some upfront planning.”

**Alex Brdar**

SENIOR MARKETING TECHNOLOGY CONSULTANT | WILLOWTREE





## Putting It All Together.

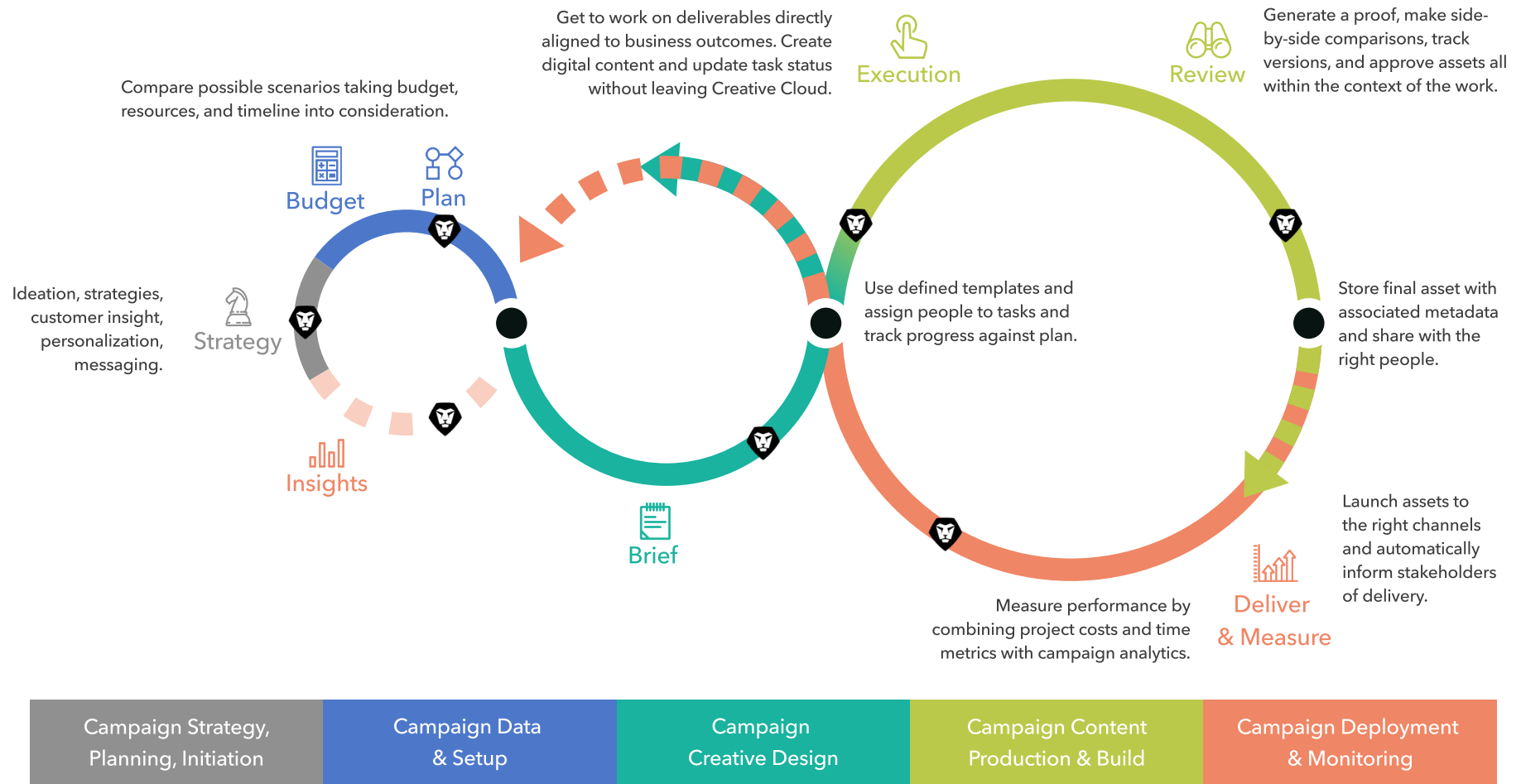
Workfront is project management at its core, but it's also request management, resource management, and portfolio management, all of which can ladder up to C-level executive strategic goals.

**The more you operate in Workfront, the more efficient the teams become.** As you build and perform boilerplate projects and gain muscle memory for the steps, we can create templated projects and approval groups and begin to accomplish tasks that take very few operational clicks to produce.

In most enterprises, information is currently scattered all over the place – documents, spreadsheets, stuck in email – and employees only see their own threads. Workfront solves this problem by simplifying information exchange and ultimately, getting everyone on the same page.

## Future State of Work with Workfront.

Here's what a **two-week sprint** might look like with all the teams working together. When all the people and technologies are humming, this is what it looks like:





**Much of Workfront's maturity is shown in the ease of integrations.** If you're an executive and always in Outlook, there's a plug-in for Workfront. From there, you can get status updates and easily convert an email to a task. If you're in Slack, you can stay there. If you're a developer working in code, you can use JIRA integrations to comment on tasks. One of the problems we deal with as an agency is file-sharing with outside enterprises. With Workfront, all the various file-sharing solutions we encounter can be unified and searchable and used for document proofing, video proofing – whatever we need.”

**Judge DiCesaro**

SENIOR MARKETING TECHNOLOGY CONSULTANT | WILLOWTREE



## Getting the most out of a tech stack like Adobe Experience Cloud takes more than time and financial investment.

It takes more than standing up and integrating each piece of software. Above all, it requires a cultural shift.

As a marketing or IT leader, these are the crucial questions to ask and honestly answer: are you ready for this change, and can you organize yourself for business transformation? Because unless you can shift the mindset and culture of your company, the tech stack itself doesn't matter.

MACH Architecture is a piece of this, but how mature is your organization in Agile Delivery? How capable is your business in terms of understanding requirements or iterative innovation? Are you committed to innovation from the top down and bottom up? What systems are in place – not technological systems but operational and cultural systems – that will help you scale innovation?

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Part of shifting to the Adobe tech stack is helping organizations shift their mindset to change the culture of their business. That's what creates the leap from "delivering content" to "driving transformation."

## Affecting Cultural Change.





In 2011, Marc Andreessen famously wrote, ‘software is eating the world.’ Over a decade later, it’s clear he was correct. Today, behind every task a business seeks to accomplish, there lives a software process. Every new product we launch and every marketing decision contains a piece of software. Given this reality, **where does your company culture fall on the continuum of preparedness?”**

## Mike Colombo

CHIEF MARKETING SERVICES OFFICER | WILLOWTREE



As we've said, interconnected products like Adobe Experience Manager and Adobe Commerce are applications in which you can do the same thing 16 different ways.

It takes time to get unstuck when you find out you've done it wrong.

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There are only a few right ways, and these best practices are learned only through trial and error after years spent using the platform.

# Adobe Experience Cloud *Checklist.*

## CHECKLIST

WillowTree's experienced team has already logged the years and built the expertise.

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We can be the team that implements and optimizes the stack and then hands it over at the end of the process. We'll work hand-in-hand with your organization to provide digital expertise while building collaboratively and affecting transformation in company operations and culture.

While the process is multi-pronged and not entirely linear, here is a set of tangible steps to consider as you embark on this next phase of transformation and build toward a modern, scalable, and personalized content approach.

### CDP

- ☐ Identify data silos across your architecture
- ☐ Identify data points relevant towards marketing goals
- ☐ Map touch points across the entire user experience of your organization

### Content Ops

- ☐ Define regions/languages of focus
- ☐ Define content goals and publishing timeframes
- ☐ Define processes for creating, reviewing, and publishing
- ☐ Identify whether your content structure is reflective of how your team operates

### Personalization & CDP

- ☐ Identify KPIs for your organization and marketing actions
- ☐ Review data points you can leverage to identify distinct audiences
- ☐ Define a process for content creation based on audiences
- ☐ Identify marketing actions and tools needed to maintain consistent messaging
- ☐ Define a system for tracking and analyzing user behaviors toward your KPIs

### MACH

- ☐ Review back-end architecture to focus Experience Manager/Magento to an API-first approach
- ☐ Review front-end technologies to gauge lift for a headless approach
- ☐ Identify the need for shared services across multiple channels





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CHECKLIST

Ready to take  
the next step?





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