

**Business Requirements Document**

**<Customer Name>**

**<MM-DD-YYYY>**

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**Document Control**

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| --- | --- |
| Document Title | Business Requirements Document  <CUSTOMER NAME> <MM-DD-YYYY> |
| Authors | … |
| Document Purpose | This document is intended to capture the AEP phase X use cases and requirements. |

Version Control

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| --- | --- | --- | --- |
| Version # | Date | Author | Comments |
| 1 |  |  |  |
| 2 |  |  |  |
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References / Associated Documentation

The table of references shown below provides a list of those documents that have been directly used to create this document.

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| REF. | VERSION | DATE | AUTHOR/SENDER | TITLE / FILENAME |
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Table of Contents

[Overview 3](#_Toc47690354)

[Strategic Overview 4](#_Toc47690355)

[o Business Objectives & KPIs 4](#_Toc47690356)

[o Prioritized Business Use Cases & Scoring 4](#_Toc47690357)

[o Project Scope & Timeline 5](#_Toc47690358)

[o Customer Journeys Overview 5](#_Toc47690359)

[Functional Overview 6](#_Toc47690360)

[o Detailed Use Case Descriptions 6](#_Toc47690361)

[o Functional Requirements 7](#_Toc47690362)

[o Audiences & Segments 7](#_Toc47690363)

[o Activation Channels 7](#_Toc47690364)

[Technology Overview 8](#_Toc47690365)

[Assumptions 10](#_Toc47690366)

[o Assumptions – Business 10](#_Toc47690367)

[o Assumptions - Functional 10](#_Toc47690368)

[o Assumptions - Technical 10](#_Toc47690369)

[Appendix 11](#_Toc47690370)

[Terminology 12](#_Toc47690371)

# Overview

<Fill in the details on Business Overview from the customer>

# Strategic Overview

< Fill in the details on Business Strategy from the customer>

## Business Objectives & KPIs

< Fill in the details on Objectives/Strategy/Tactics/KPIs from the customer. Provide needed detail on prioritization, assumptions, baseline sources, rationale or data reviewed to develop targets. KPI-specific assumptions can be noted here – others not tied directly to Business Objectives or KPIs can be noted in the Assumptions below.>

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Objective / Goals | Strategies | Tactics | KPIs | KPI baseline (\*\*) | KPI target % Increase estimates (\*\*) |
| Goal 1 | Strategy 1  Strategy 2 | Tactic 1  Tactic 2  Tactic 3 | KPI 1  KPI 2 |  |  |
| Goal 2 | Strategy 3 | Tactic 1  Tactic 2 | KPI 1  KPI 2  KPI 3 |  |  |
| Goal 3 | Strategy 4 | Tactic 1 | KPI 1  KPI 2 |  |  |

\*\* < If KPI Baselines and Target % are not known or cannot be defined by client at this phase, make note of what is available and caveat that these details will be referenced & defined further in the Value Realization phase.>

## Prioritized Business Use Cases & Scoring

< Fill in the details on high level project use cases from the customer. If a ‘Business Use Case Priorization’ workshop or activity occurred, that will also inform what’s here. If the number of Use Cases is not noted in the SOW and/or the Tier, the quantity should be determined collaboratively by the DPS Lead, Project Manager, Client Partner, and Enterprise Architect. Use the methodologies noted in the Use Case Library and Use Case Prioritization & Scoring artifacts to note any additional context re effort & impact or KPIs in order to prioritize use cases and then add directly here via copy & paste or a new table below. Note: ask the client for the actual monthly or yearly data that informs the KPIs, as that will be needed during the Value Realization phase.>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Use Case | Priority / Scoring | KPIs | KPI baseline (\*\*) | KPI target % Increase estimates (\*\*) |
| Use Case 1 |  |  |  |  |
| Use Case 2 |  |  |  |  |
| Use Case 3 |  |  |  |  |

\*\* < If KPI Baselines and Target % are not known or cannot be defined by client at this phase, make note of what is available and caveat that these details will be referenced & defined further in the Value Realization phase.>

## Project Scope & Timeline

< Fill in the details on Project Scope or Timeline. This could be high-level and link to further details in the project plan.>

## Customer Journeys Overview

< Fill in the details on Customer Journey where available from the customer. As needed, add quantified or qualifed reasons for why these customer journeys were chosen, perhaps based on prior business objectives. Make note to add prioritized personas & segments per customer journey, where available - and align to Audiences and Segments section below. This content may also be otherwise better documented in the Technical Details section or related technical artifacts.>

# Functional Overview

## Detailed Use Case Descriptions

<< Example statements included below. Fill in any functional details for customer use cases - DELETE >>

|  |  |
| --- | --- |
| UC-01  Use Case Description | Improve relevance of emails through better men’s / women’s segmentation (based on web, email and cross-channel purchase behavior)​​​ |
| Business Value | TBD – use or expand on KPIs from above |
| Success Criteria | TBD – intended customer outcome |
| Data Source & Variable Types | Analytics​  Dynamix AX  Loyalty Builders Model Scores |
| Activation Details | Activated through Adobe Campaign (Email) |

|  |  |
| --- | --- |
| UC-02  Use Case Description | Ingest Loyalty Builders information to drive more relevant product information across web, email and digital marketing |
| Business Value | TBD – use or expand on KPIs from above |
| Success Criteria | TBD – intended customer outcome |
| Data Source & Variable Types | Analytics​ (Tracking Source Code/ Browsing History)  Dynamix AX (Purchase History)  Loyalty Builders Model Scores (Propensity Scores) |
| Activation Details | Next Best Category Recommendation through email (Adobe Campaign) |

## Functional Requirements

<<These are the 6 common baseline functionalities. Add customer specific functional requirements as needed - DELETE >>

|  |  |
| --- | --- |
| ID | Requirement |
| FR1 | The system should allow ingestion of data into AEP from multiple data sources including non-Adobe and Adobe sources. |
| FR2 | The system shall allow the flexibility to build the Unified Profile based on identities from the source systems. |
| FR3 | The system shall allow easy access to the data ingested in platform- Via Query Service, API’s, Connecting Query Service to third-party tools like Power BI and Tableau. |
| FR4 | The system shall allow for activation of segments from Experience Platform to Adobe and non-Adobe products. |
| FR5 | The system shall allow the ability to make the model data as an API in real-time |
| FR6 | The system shall have role-based access to allow respective client resources to access the system. |

## Audiences & Segments

<<To be updated with customer specific details. Link to the location of the Enterprise Architecture Technical Solution Document. - DELETE>>

|  |  |  |  |
| --- | --- | --- | --- |
| **Use Cases** | **Audience/Segments** | **Description** | **Data Sources** |
|  | Store Proximity of 10 miles |  |  |
|  | Men buying men’s products |  |  |
|  | Women buying women’s products |  |  |

## Activation Channels

<<To be updated with customer specific details - DELETE>>

|  |  |  |  |
| --- | --- | --- | --- |
| **Use Cases** | **Channels** | **Approach** | **Identity** |
|  | Email | Real-time CDP |  |
|  | Facebook | Launch extension |  |
|  | The Trade Desk | Custom |  |
|  | Instagram |  |  |
|  | Pinterest |  |  |

# Technology Overview

This section outlines the foundational capabilities and applications services required to execute the use cases above. The technical design and implementation details are captured in the Enterprise Architecture Technical Solution Design (EATSD) document <<add link to document>>.

* + Foundational Capabilities

<<These are the 6 AEP Standard functionalities. Generic and Applicable to every customer but remove those not relevant. - DELETE>>

|  |  |
| --- | --- |
| Data Modeling | Standardization and interoperability are key concepts behind Adobe Experience Platform (AEP). Experience Data Model (XDM) is a foundational framework that allows AEP to deliver the right message to the right person, on the right channel, at exactly the right moment. XDM will provide a common structure and definitions for customer experience data. |

|  |  |
| --- | --- |
| Data Ingestion | Adobe Experience Platform brings data from multiple sources together to help brands better understand the behavior of their customers. Brands can leverage Batch and Streaming ingestion methods to bring data into AEP. |

|  |  |
| --- | --- |
| Data  Governance | Adobe Experience Platform Data Governance is an easily extensible framework that is embedded in data usage workflows. AEP data governance capabilities will allow brands to take complete control over governing your data from the point of collection to when it’s activated to destinations outside the platform. |

|  |  |
| --- | --- |
| Query Service | Query Service makes it possible for brands to connect the online-to-offline customer journey and understand omni-channel attribution. It can be used to make sense of your data and gain in-sights about your customers. |

|  |  |
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| Data Science Workspace | Adobe Experience Platform Data Science Workspace (DSW) uses machine learning and artificial intelligence to unleash insights from your data. DSW offers predefined machine learning models you can use in your own solutions as well as the capability to create your own models. |

|  |  |
| --- | --- |
| Unified Profile | Unified Profile allows you to consolidate your disparate customer data into a unified view offering an actionable, timestamped account of every customer interaction. It enables you to drive coordinated, consistent, and relevant experiences for your customers no matter where or when they interact with your brand. |

* + Application and Intelligent Services

These services enhance experience platform capabilities to provide marketer level tools powered by platform. Application Services are functional capabilities that help the marketer and data analyst while intelligent services are models developed using sensei technology that democratize data science by making it more accessible to marketers and data analyst.

<<These are the 4 common App & Intelligent Services – remove those not in scope for the project. - DELETE>>

|  |  |
| --- | --- |
| Real-Time  Customer Data Platform | Real-time Customer Data Platform (Real-time CDP) helps companies bring together known and anonymous data from multiple enterprise sources in order to create customer profiles that can be used to provide personalized customer experiences across all channels and devices in real time. |

|  |  |
| --- | --- |
| Customer  Journey  Analytics | Customer Journey Analytics lets you join all of your data from every channel into a single interface for real-time, cross-channel analysis and visualization, allowing you to make better decisions with a holistic view of your business and the context behind every customer action. |

|  |  |
| --- | --- |
| Journey  Orchestration | Journey Orchestration allows you to tailor individual journeys for every customer based on their previous behavior and preferences. With Journey Orchestration you can anticipate individual needs through real-time insight, personalize engagement at scale across channels, orchestrate the customer experience from start to finish and analyze journey reporting. |

|  |  |
| --- | --- |
| Intelligent  Services (Attribution AI, Customer AI) | Intelligent Services gives marketers responsible for customer experience access to AI-as-a-service, making it easy for anyone to predict customer behavior, measure the impact of a campaign, or ensure better return on every investment. It empowers marketers and marketing analysts to leverage the power of artificial intelligence and machine learning in delivering customer experiences. |

# Assumptions

## Assumptions – Business

< List down the assumptions in defining the business objective/strategy >

## Assumptions - Functional

< List down the assumptions made during Functional Rquirements gathering>

## Assumptions - Technical

< List down the assumptions made during Technical requirement gathering

# Appendix

# Terminology

|  |  |
| --- | --- |
| Term | Description |
| Adobe Experience Platform (AEP) | Adobe Experience Platform standardizes data and content across the enterprise, powering real-time consumer profiles, enabling data science, and accelerating content velocity to drive experience personalization across the customer journey. |
| **Adobe I/O** | Adobe I/O is part of Experience Platform and provides access to everything developers need to integrate, extend, and customize Experience Platform including APIs, events, developer console, and helpful tooling. |
| **Experience Data Model (XDM)** | Experience Data Model (XDM) is the concept of using standard schemas to unify data for use with Experience Platform and Adobe Experience Cloud solutions. XDM standardizes how data is structured and speeds up and simplifies the process of gaining insights from massive amounts of data. |
| **XDM Profile** | An XDM Profile forms a singular representation of the attributes and interests of both identified and partially-identified subjects. Less-identified profiles may contain only anonymous behavioral signals, such as browser cookies, while highly-identified profiles may contain detailed personal information such as name, date of birth, location, and email address. As a profile continues to grow, it becomes a robust repository of personal information, identification information, contact details, and communication preferences for an individual subject. |
| **XDM ExperienceEvent** | An ExperienceEvent captures observations, including the point in time and identity of the subject involved. Experience Events are fact records of what occurred, representing what happened without aggregation or interpretation. They are critical for time-domain analytics as they allow for observation and analysis of changes that occur in a given window of time and the comparison between multiple windows of time to track trends. Experience Events can be either explicit (directly observable human actions) or implicit (raised without a direct human action). |
| **XDM System** | XDM System is the infrastructure, data semantics, and workflow in Experience Platform that is powered by standard schemas. |
| **Mixin** | A mixin allows users to extend reusable fields that contain variables defining one or more attribute intended to be included in a schema or added to a class. |
| **Batch** | Batch is a set of data collected over a period of time and processed together as a single unit. |
| **Batch ID** | Batch ID is an Adobe-generated identifier for a batch of data. |
| **Contract Data "C" Labels** | Contract C labels are used to categorize data that has contractual obligations or is related to a customer's data governance policies. |
| **Data Dictionary** | In Experience Platform Launch, a data dictionary is a set of data elements defined within a property. |
| **Data Stream** | A data stream is a set or collection of messages which share the same schema and are sent by the same source. |
| **Dataset** | A dataset is a storage and management construct for a collection of data, typically a table, that contains schema (columns) and fields (rows). |
| **Dataset ID** | An Adobe-generated identifier for an ingested dataset. |
| **Data Governance** | Data governance encompasses the strategies and technologies used to ensure data is in compliance with regulations and organization policies with respect to data usage. |
| **Data Governance Labels** | Data governance labels provide users the ability to classify data that reflects privacy-related considerations and contractual conditions to be compliant with regulations and corporate policies. Data governance labels added to a connection are inherited down or applied to all datasets and fields ingested through the connection. Data governance labels can also be applied directly to datasets and fields. |
| **Data Integration Partners** | Data integration partners simplify and automate the loading and transformation of massive volumes of data from over 200 sources to Experience Platform without writing code. |
| **Dataset Labels** | Dataset labels can inherit labels added via a connection. Edit connection to add, edit, or remove dataset labels. Labels can be added to a dataset. Fields will inherit all dataset labels. |
| **Merge Policy** | Merge policy is a set of configurations controlling identity stitching and attribute merging across identities and or datasets for a specific schema. |
| **Parquet Files** | A parquet file is a columnar storage file format with complex nested data structures. Parquet files are required for adding data to populate a schema dataset. |
| **Ingest** | Ingestion is the process of adding data from a source to Experience Platform. Data can be ingested to Experience Platform in a number of ways including streamed, batched, or added via connector. |
| **Streaming Ingestion** | Streaming ingestion provides users a method to send data from client and server-side devices to Experience Platform in real-time. |
| **Streaming Endpoint** | A streaming endpoint URL is a unique endpoint provided by Adobe and tied to a customer's IMS org to stream data into Experience Platform. |
| **Data Source** | A data source is a user designated origin of data. Examples of a data source are a mobile app, profile and/or experience events, website profile events or a CRM. |
| **Decisioning Service** | The Decisioning Service is collection of services and UI that enables marketers to create and deliver end-user personalized offer experiences across channels and applications using business logic and decision rules. |
| **DULE** | DULE is an acronym for Data Usage Labeling and Enforcement. DULE is a key part of data governance and a collection of key features that allows for data usage labeling and applying data access policies for governance needs within an organization. |
| **Experience Platform Launch** | Launch is a tag and SDK management ecosystem, integrated with Experience Platform and Experience Cloud Solutions. Launch provides tools to deploy, unify, and manage analytics, marketing, and advertising integrations that are necessary to power relevant customer experiences on all client devices. |
| **ExperienceEvent** | ExperienceEvent is an Experience Platform standard schema that captures observations, including the point in time and identity of the subject involved. Experience Events are fact records of what occurred, representing what happened without aggregation or interpretation. |
| **GDPR** | The General Data Protection Regulation (GDPR) is a legal framework that sets guidelines for the collection and processing of personal information of individuals within the European Union (EU). The GDPR sets out the principles for data management and the rights of the individual and covers all companies that deal with the data of EU citizens. |
| **Identity Graph** | Identity graph is a map of relationships between stitched and linked identities, that updates near real-time with customer activity. |
| **Private Identity Graph** | Private Identity Graph is a private map of relationships between stitched and linked identities that visible by only your organization and built based on your first-party data. |
| **Identity Service** | Experience Platform Identity Service UI enables the creation and management of identity types to enable linking of identities across devices and channels for a complete user-view from Unified Profile. |
| **Identity Stitching** | Identity stitching is the process of identifying data fragments and stitching them together to form a complete record of a profile. |
| **Query Service for Adobe Experience Platform** | Experience Platform Query Service enables data analysts to query ExperienceEvents and XDMs for use in analytics and machine learning. |
| **Business Intelligence Tools** | Business intelligence, also known as "BI" tools are primarily integrated with the Experience Platform Query Service. BI tools are types of application software that collect and process large amounts of unstructured data from internal and external systems. |
| **Data Science Workspace** | Data Science Workspace within Experience Platform enables customers to create machine learning models utilizing data across Experience Platform and Adobe Solutions to generate intelligent insights and predictions to weave delightful end-user digital experiences. |
| **Jupyter Notebook** | Jupyter Notebook is an open-source web application that enables users to create and share documents that contain live code, equations, visualizations, and narrative text. |
| **Recipe** | A recipe is Adobe's term for a model specification and is a top-level container representing a specific machine learning, AI algorithm or ensemble of algorithms, processing logic, and configuration required to build and execute a trained model and hence help solve specific business problems. |
| **Trained Model** | A trained model represents the executable output of a model training process, in which a set of training data was applied to the model instance. A trained model will maintain a reference to any Intelligent Web Service that is created from it. The trained model is suitable for scoring and creating an intelligent web service. Modifications to a trained model can be tracked as a new version. |
| **Machine Learning (ML)** | Machine learning is the field of study that enables computers the ability to learn without being explicitly programmed. |
| **Artificial Intelligence** | Artificial intelligence is a theory and development of computer systems that are able to perform tasks that normally require human intelligence, such as visual perception, speech recognition, decision-making, and translation between languages. |
| **Sensei ML Framework** | Sensei ML Framework is a unified machine learning framework across Adobe that leverages data on Experience Platform to empower data scientists in the development of machine learning driven intelligence services in a faster, scalable, and reusable manner. |
| **Unified Profile** | **Unified** Profile is an Experience Platform standard data model used to define attributes of consumers. A profile can also be an aggregate of event data and attributes related to a person and or device. |
| **Segment** | A segment is a set of rules that include attributes and event data that qualify a number of profiles to become an audience. |
| **Segmentation** | Segmentation is the process of dividing a large group of customers, prospects, or consumers into smaller groups that share similar attributes and will respond similarly to marketing strategies. |