

OE pre-requisites for RT-CDP standard use case enablement



Readiness Area	Readiness Component	Applicable For Use Case	Details & Comment
Organisation	Alignment across business units on RT-CDP use cases and solution design	1,2,3	Consider the following teams & stakeholder: web tracking & analytics, tag management (Launch), CRM & offline customer data base, online marketing, consent mgmt & data privacy, Adobe Target, Adobe Campaign; any dependencies and constraints to other projects? Other milestones need to be considered: AEP
	Detailed RT-CDP solution design & use case brief for involved external partners (marketing agency)	1	Consider the following teams & stakeholder: social media marketing, facebook & google advertisement
	Define SMART KPIs and measurement of success, operational acceptance criteria	1,2,3	Consider priorities per use case: KPIs such as web engagement & response indicator (CTR & CVR), lead/sale numbers and ratio, campaign analytics, ROAS
	Define and align on AEP RT-CDP power user and potential training requirements	1,2,3	Consider colleagues with audience & data mgmt, segmentation, analytics, data processing and SQL skills; DMP/performance marketing manager
	Collaboration & project planning	1,2,3	Consider rollout & and governance lead, product owner, project manager, team member, timelines and way of working
	Availability & collaboration of required resources	1,2,3	Consider to involve team member: web tracking & analytics, CRM manager, customer data base engineer, ETL/SQL specialist, consent mgmt & data privacy steward, Adobe Target & Adobe Campaign manager, enterprise tech & data architect
	Availability & collaboration of required external partner resources	1	Consider any other third parties involved: marketing agency campaign manager (social media advertisement)
Tech	Review and align on AEP licence model and RT-CDP guardrails	1,2,3	Consider required AEP licence modules, monthly unique visitor, number of customer profiles to be onboarded, rough estimates on data points per customer to be ingested
	Review and plan Cognizant Netcentric access to implementation environments	1,2,3	Consider Adobe Launch/Tag, Adobe Campaign, Adobe Target; appropriate permissions for the implementation in AEC instance (azEU Org ID)
	Availability of required advertiser account APIs and tech specs	1	Consider Facebook CAPI, Google Conversion API; accounts for Google and Facebook APIs
	Availability of required Google client side implementations	1	Consider existing client side conversion implementation of gtag; backend services available to be called on edge to enrich the conversion, HTTP based backend services can be integrated as described here https://experienceleague.adobe.com/docs/platform-learn/implement-web-sdk/event-forwarding/setup-event-forwarding.html?lang=en#create-an-event-forwarding-rule
	Review and alignment on AEP roles & rights concept	1,2,3	Consider Adobe Admin Console Roles & Right Mgmt; who should have what level of access?
	Clarify and align on aws S3 bucket as AEP offline data landing zone	2,3	Consider aws and azure; able to export CRM data in the specified JSON format to an AWS S3 bucket or azure blob storage
	Clarify and align on pseudonymization capabilities (#email)	1,2,3	Consider #email as one vital internal identifier to join data sets as well as to activate data in 3rd party advertisement environments
Data	Clarify and align on SaaS cloud data storage	1,2,3	Consider allowance to persist, process and use the ingested data (potentially including PII) within Adobe RT-CDP/Netherlands cloud data center
	Online: clarify and align on domains/applications & identify required data points	1,2,3	Consider alignment with marketing (campaign target audiences)
	Online: Required data trackable / available in data layer	1,2,3	Consider working implementation of Adobe Tags and an existing data layer
	Offline: data sources of required data identified	2,3	Consider alignment with marketing (campaign target audiences)
	Offline: Required data accessible and transferable into desired XDM data format (.json)	2,3	Ensure data engineering capability & capacity to establish new ETL processes and data transformation into required json format; minimum data is the identity and marketing consent, all other data shall follow global XDM standards;
	Data conjunction concept applicable (shared identifier online&offline)	2,3	Consider tracking/ingestion of at least one common identifier for customer online and offline records (e.g. email, crmid, etc); for online and offline data stitching, OE website needs to have IDP (Login, trackable authentication) integrated
	Data layer (AA SDR) documentation ready to share	1,2,3	
Privacy	Local DPO approval of consent mgmt & data privacy concept	1,2,3	Consider approval for web sdk data collection, customer PII cloud storage and processing, profile building, onsite personalisation, targeting and 3rd party data sharing use case
	Data storage locations (adobe, aws) are identified and approved (SaaS, cloud solutions)	2,3	
	Data processing activities, purposes and data flows are identified and data processing agreements checked	1,2,3	
	Data collection & processing activities are identified and necessary legal requirements met	1,2,3	Consider: cookie consent (e.g. OneTrust) for online data and marketing consent for offline data; providing consent for "data collection" / "personalisation" / "targeting" / "data sharing"
	Review and define how to implement privacy-by-design	1,2,3	
	Review and, if necessary, update existing consent and processes for required data subjects	1,2,3	
	Review and align on customer profiling and behavior tracking	1,2,3	
	Review and, if necessary, update existing data privacy policy and registers	1,2,3	
	Review any existing and, if necessary, define pseudonymization	1,2,3	Consider SHA-256 as preferred hashing algorithm
	Review and, if necessary, update existing binding contractual clauses (BCCs), new standard contractual clauses (SCCs)	1,2,3	
	Review and, if necessary, update existing data privacy risk assessment (DPRA) for oneMarketing/AEP Services	1,2,3	
	Review and, if necessary, update existing data privacy risk assessment (DPRA) for 3rd Party Services involved	1,2,3	
	Review and, if necessary, conduct Privacy Impact Assessment (PIA) & Transfer Impact Assessment (TIA)	1,2,3	