Free kit · version 1.1 · November 2026

AEP Assessment Kit

Templates and a worked example for assessing an existing Adobe Experience Platform setup before anyone changes the identity model.

Discovery checklist · Where AEP shows it · Inventory · Interview notes · Data matrix · Identity matrix · Event catalog · Diagram notation · Licence check

Worked example: Corvana Air, a fictional airline. All names, numbers and interviews are invented. Adobe facts checked against Adobe's documentation and product descriptions, November 2026.

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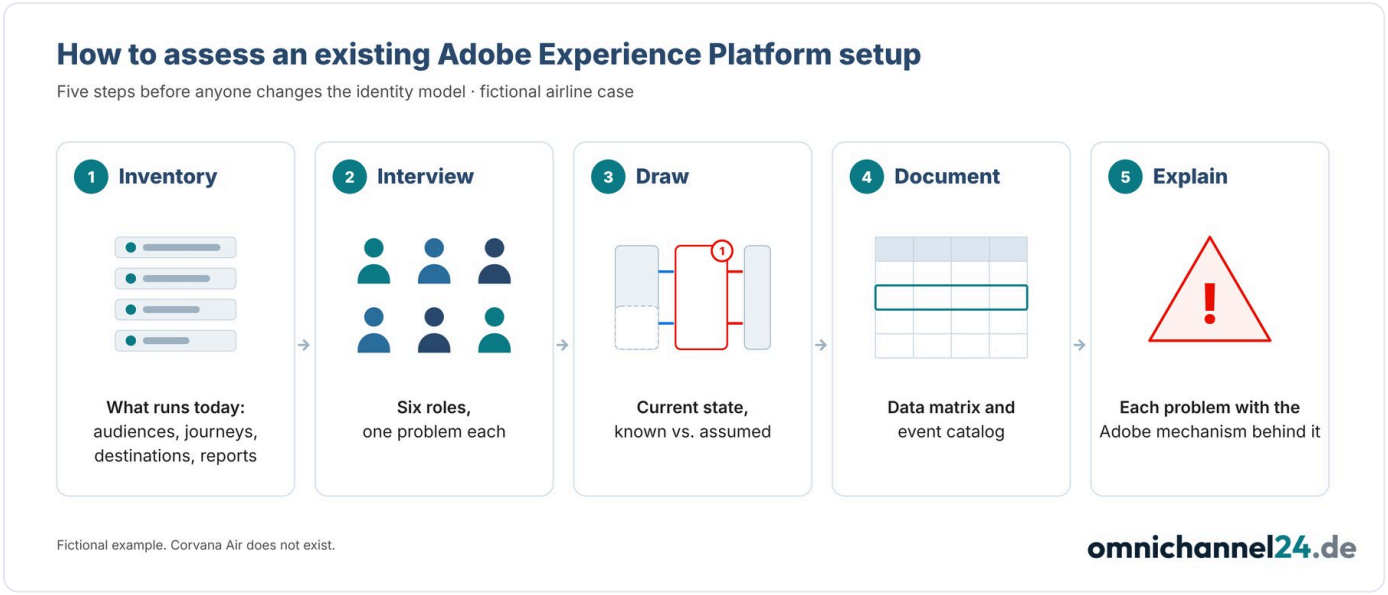
START HERE

How to use this kit

The order matters. Vendor rollout checklists start with "define your use cases". In a live AEP, start with what breaks when the identity model changes. Each template below has empty rows for your project and a filled example from the fictional Corvana Air case.



1 Inventory

List every audience, journey, destination and report that depends on today's identities.

2 Interview

Six roles, one problem each. Every quote becomes a hypothesis you verify in the system.

3 Draw

The current state on Adobe's reference layout. Assumptions dashed, problems numbered.

4 Document

Data matrix, identity matrix and event catalog: the evidence behind the drawing.

5 Explain

Each problem with the Adobe mechanism behind it, then the licence check.

CHECKLIST

Discovery checklist: seven vendor questions, turned around

Area	Rollout question (new platform)	Assessment question (live AEP)	Where to look	Done
Stakeholders	Who needs to be involved?	Who owns each journey, audience and dataset today, and who signs off a change?	Journey and audience owners, roles and permissions	☐
Use cases	Which use cases do we want?	What runs today and must not break?	Audiences, journeys, destinations, CJA projects	☐
Concepts and licence	Which features, limits and billing apply?	Which edition and package are licensed, and which limits are already close?	Order form, Adobe product descriptions	☐
Architecture	Do we need a sandbox?	Why are there this many sandboxes, and which one becomes the reference for the rebuild?	Sandboxes, sandbox tooling packages	☐
Data sources	Which sources, which unique identifier?	Which dataset sends which identity as primary, at what cadence, with which labels?	Schemas, datasets, Monitoring › Identities	☐
Profile rules	Which rules unify profiles?	Which namespaces are unique, in which priority, and which merge policies are active?	Identity settings, identity graph viewer, merge policies	☐
KPIs	Which KPIs show ROI?	What is the baseline before the change: graph sizes, audience counts, match rates, latency?	Identity dashboard, audience sizes, destination reports	☐
Data residency	Where must data reside?	In which region does the instance run, and does that match the rules?	Contract, data protection officer	☐
Sensitive data	Which data is sensitive?	Which fields carry special categories, and which labels and policies protect them?	Data usage labels, policies	☐

Structure inspired by vendor rollout worksheets such as Salesforce's Data 360 rollout checklist; questions rewritten for an existing Adobe Experience Platform setup.

CHECKLIST

Where the AEP interface shows the evidence

Interviews tell you where people feel the pain. These places in the production sandbox show where the data actually stops. Open them read-only before anything goes on a diagram.

Where in AEP	What you see	What it answers	Done
Monitoring (Data Management)	Cards for Data lake, Identities, Profiles, Audiences, Destinations; last 24 h by default, up to 30 days or custom	Where data stops on its way to a message	☐
Dataflow run details (Monitoring › Data lake › source › dataflow › run)	Records received, ingested, failed; error code and description; error diagnostics to preview and download	Which rows fail and why. Diagnostics only if switched on when the source connection was created; kept up to 30 days. Batch sources only.	☐
Monitoring › Profiles	Per dataflow: records received and failed, profile fragments created and updated	Whether a successful batch also updated Profile	☐
Monitoring › Identities	Records failed, skipped (only one identifier), graphs created and updated	Which records cannot link at all, and how fast graphs change	☐
Datasets (dataset activity)	Successful and failed batches, preview of 100 rows, Profile toggle, partial ingestion threshold (5 % default), retention of event datasets	Which datasets feed Profile and how long events stay. Data ingested before Profile was enabled is not added afterwards.	☐
Schemas (identity fields)	Identity and Primary identity checkboxes with the namespace; one primary identity per schema	Where wrong identities come from. In a Profile-enabled schema with data, the primary identity cannot be changed.	☐
Profiles › Browse	One merged profile by namespace and value: attributes, 100 most recent events, audience memberships	What a collapsed profile really contains	☐
Monitoring › Destinations	Identities activated, excluded (missing attributes or consent), failed	Whether consent and labels block what they should	☐
Audits	Who changed schemas, datasets, namespaces, merge policies, audiences, destinations; kept 365 days	Who built today's model, and when	☐
Debugger and Assurance	Edge Trace opens an Assurance session; the request shows the XDM payload from the browser	Which identities the website really sends	☐
License usage dashboard	Licensed, measured and predicted usage per metric and sandbox; daily snapshot; own permission, off by default	How close the limits are before profile counts move	☐

Source: Adobe Experience League (Monitoring, Datasets, Schemas, Profile UI, Audit logs, Assurance, License usage guides), checked November 2026.

TEMPLATE

Template 1 · Inventory of what runs today

YOUR PROJECT

Object	Count	Depends on (identity)	Owner	Risk when identities change

EXAMPLE · CORVANA AIR (FICTIONAL)

Object	Count	Depends on (identity)	Owner	Risk when identities change
Audiences	42	Email, Miles ID	CRM team	Member counts jump when collapsed graphs split
Journeys	16	Email (entry), PNR (booking events)	Agency	Entry, re-entry and exit behave differently
CJA projects	23	Person ID = email	Analytics	Time series break when the person ID changes

TEMPLATE

Template 2 · Interview notes

YOUR PROJECT

Role	What they said	Need	Observed problem	Hypothesis	How to verify

EXAMPLE · CORVANA AIR (FICTIONAL)

Role	What they said	Need	Observed problem	Hypothesis	How to verify
Head of loyalty and CRM	“The assistant of our best corporate customer gets more upgrade offers than her boss.”	Offers for the person who flies	Booker data on traveller profiles	Booker email sent as identity (P1)	Identity dashboard: graphs with more than one Miles ID
Head of operations control	“For a cancellation, the call center phones people. It takes hours.”	Disruption message within minutes	Flight status not in AEP	Needs a streamed event per passenger (P5)	Can operations send one event per passenger?

TEMPLATE

Template 3 · Data matrix

YOUR PROJECT

Data object	Source	Dataset	XDM class · field groups	Identities	Primary	Ingestion · cadence	Time until usable	Labels	Problem	Target

EXAMPLE · CORVANA AIR (FICTIONAL)

Data object	Source	Dataset	XDM class · field groups	Identities	Primary	Ingestion · cadence	Time until usable	Labels	Problem	Target
Bookings	Booking system	`cv_pss_bookings`	ExperienceEvent · Flight Reservation	PNR, booker email, several Miles IDs	PNR	Nightly file	about 24 h; batch events cannot trigger journeys	none	P1, P2	One event per passenger, streamed, Miles ID primary
Web and app	Web SDK, Mobile SDK	`cv_web_app_events`	ExperienceEvent · Web Details, Commerce	ECID, email, Miles ID, business login	ECID	Streaming	profile under 15 min (p95)	none	P4	One person identifier per event
Flight disruptions	Operations control	not connected	ExperienceEvent · custom	–	–	–	–	–	P5	HTTP API, one event per passenger

TEMPLATE

Template 4 · Identity matrix

YOUR PROJECT

Namespace	Type	Sources	Identities (count)	Role today	Target priority	Unique	Why

EXAMPLE · CORVANA AIR (FICTIONAL)

Namespace	Type	Sources	Identities (count)	Role today	Target priority	Unique	Why
MilesID	Cross-device	Loyalty, login, bookings	4.1 m	one identifier among many	1	yes	The only stable person ID; must be in every known profile
Email	Email	Web, bookings, CRM	6.8 m	links bookers and travellers	2	no	Shared addresses; booker email no longer an identity
PNR	Cross-device (wrong)	Booking system	21 m	primary of booking events	–	–	No identity label; namespaces cannot be deleted
ECID	Cookie	Web SDK, Mobile SDK	38 m	primary of web events	4	no	Devices cannot rank above people or be unique

TEMPLATE

Template 5 · Event catalog

YOUR PROJECT

Event	eventType	Arrives via	identityMap	Key fields	Consent	Triggers (AJO type)	Latency target

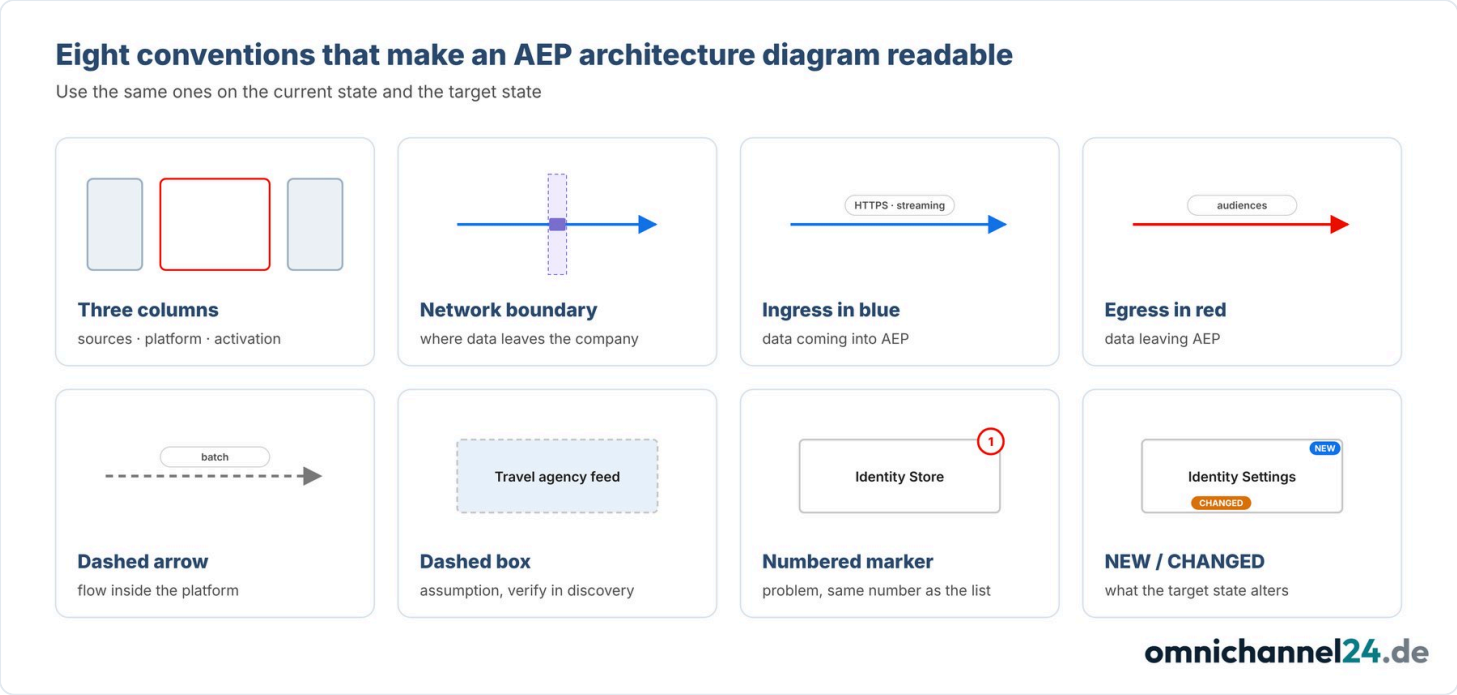
EXAMPLE · CORVANA AIR (FICTIONAL)

Event	eventType	Arrives via	identityMap	Key fields	Consent	Triggers (AJO type)	Latency target
Booking completed	`commerce.purchases`	Web SDK	ECID, Miles ID	confirmationNumber, flightNumber	Service	Pre-trip journey, supplemental ID = booking	first action within 5 min
Flight cancelled, per passenger	`corvana.ops.flightCancelled`	HTTP API, streaming	Miles ID (primary)	confirmationNumber, reason, rebooking link	Service	Unitary event journey	first action within 5 min
Strike at the hub	`corvana.ops.hubDisruption`	HTTP API, business event	Airport code (non-people)	airport, period	Service	Business event + read audience	audience export 15–60 min

Only events streamed into the platform can trigger journeys. Events that enter a journey are limited to 64 KB. Source: Adobe Journey Optimizer documentation, November 2026.

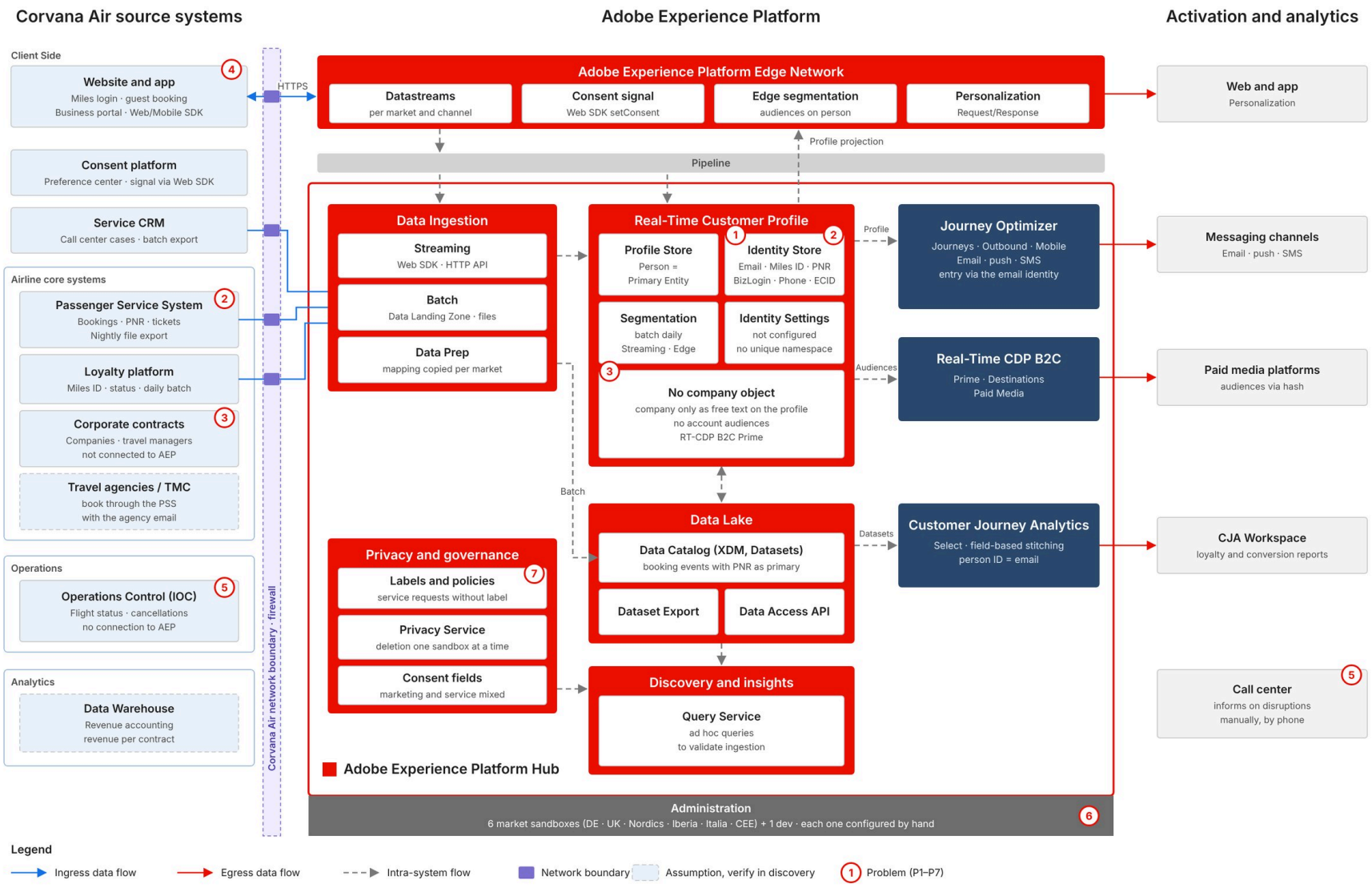
DIAGRAMS

Diagram notation and four levels of detail



Level	Audience	Question it answers	Shows	Leaves out
L1	Board, CMO	What changes for customers and the business?	Five boxes, people instead of systems	Product names, protocols
L2	Programme lead	Which system feeds which capability?	Systems and capabilities per domain	Platform internals
L3	Architects, security	How does data flow today, and what changes?	Components, flows, cadence, boundary, problems, licences	Field names
L4	Engineers, data protection	Which field, which identity, which label?	Matrices, event catalog, payloads	Boxes

Worked example · current state (level 3)



Fictional example. Corvana Air does not exist. Built on the Adobe Experience Platform reference architecture.

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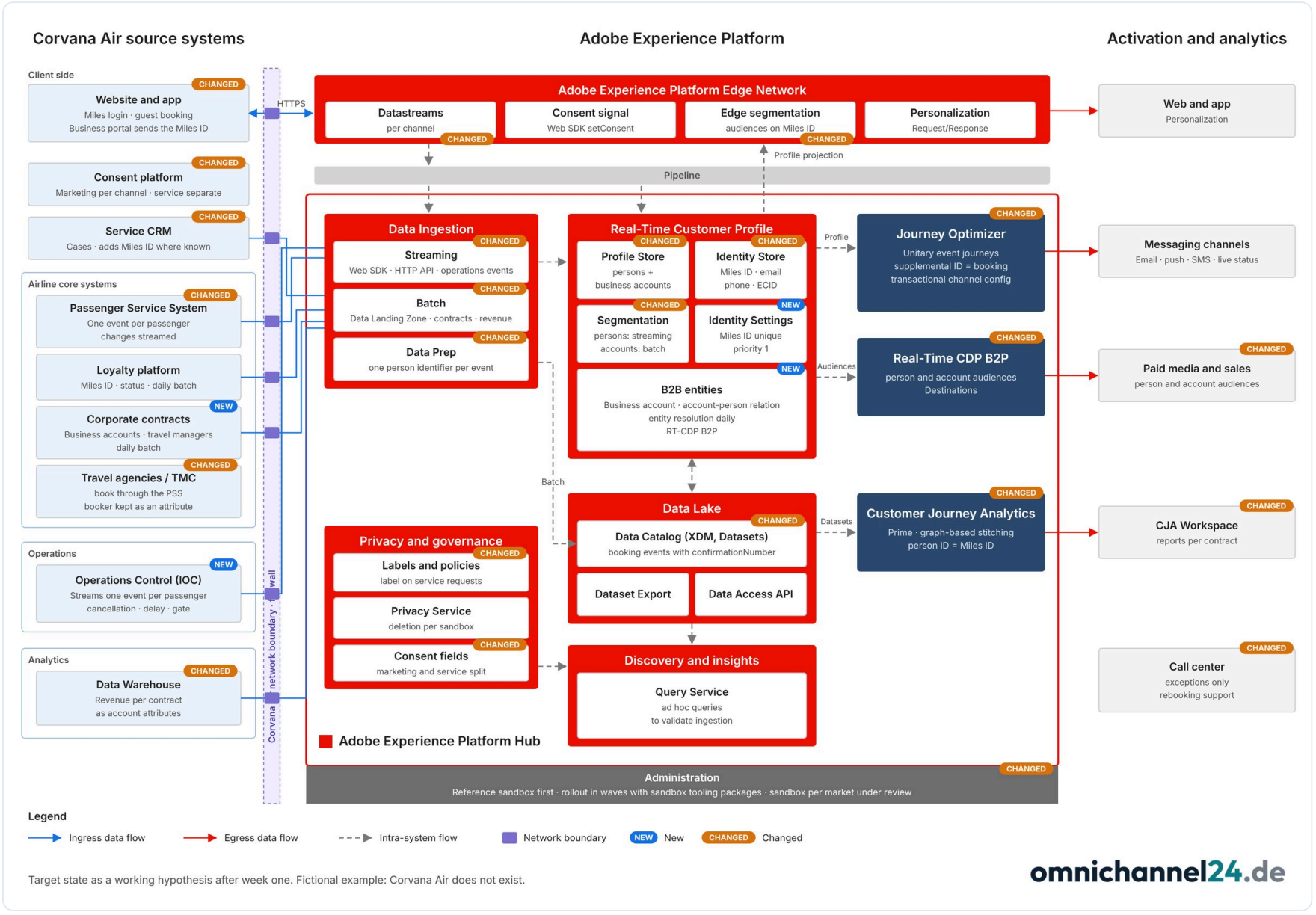
Worked example · target state (level 3)



Target state as a working hypothesis after week one. Fictional example: Corvana Air does not exist.

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LICENCE

Licence check before the target architecture

Edition

- Are customers individuals, businesses, or both? B2C, B2B or B2P.
- Do you need account audiences, or is a company code on the person enough?
- Audiences with B2B entities run in batch; new accounts are usable after the daily entity resolution.

Package

- Profile API (Ultimate only): does an app or check-in read the profile live?
- Destination SDK and advanced enterprise source and destination connectors (Ultimate only)?
- Up to five sandboxes included, more in packs of ten.

Cost drivers

- Splitting collapsed graphs raises person and engageable profiles.
- In B2P, a populated "company" field makes a business person profile.
- Non-production profiles: up to 10 % of licensed profiles.
- Overuse (B2P): billed daily after seven consecutive days.

Questions for the Adobe account team

1. Do B2B segmentation attributes work in B2P as in B2B?
2. Are sandboxes counted per product or together?
3. Are person profiles counted per sandbox?
4. Is there automated consent enforcement for the B2P business audience?

Facts from Adobe's product descriptions for Real-Time CDP (effective 2 September 2026), Journey Optimizer (8 September 2026) and Customer Journey Analytics (22 October 2026). Not licensing advice; the binding terms are in your contract.

LAST PAGE

Before anyone saves the identity settings

Three things that break first

- **Rejected events.** Once a namespace has the highest priority, Profile rejects events with two or more identities of it. Change the exports first.
- **Old graphs stay collapsed.** They are corrected only when new data updates them.
- **Counts move.** Audience sizes, licensed profiles and CJA time series change when graphs split.

The full guides

- How to assess an existing AEP setup
- How to find, simulate and fix a collapsed identity graph
- How to choose the Real-Time CDP edition
- How to draw an AEP architecture diagram

Try it in your browser

Identity graph simulator: type events, set unique namespaces, see which links survive.

Want a second pair of eyes on your AEP setup?

Request an assessment at omnichannel24.de/en/contact. Reply within 24 hours. More about my work: omnichannel24.de/en/about.

Fictional case: Corvana Air, its systems, numbers and interviews are invented. Diagrams are original drawings on the layout of Adobe's reference architectures. Adobe, Adobe Experience Platform, Real-Time CDP, Journey Optimizer and Customer Journey Analytics are trademarks of Adobe Inc.; Salesforce is a trademark of Salesforce, Inc. Independent material; no partnership with or endorsement by Adobe or Salesforce. You may share this PDF unchanged.

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