

Tenant Organization Best Practices

Organization of your data within Amperity is key to establishing efficient and effective use of the CDP and will help to ensure usability across all teams and markets.

Utilizing a clear naming convention and folder structure is helpful to manage segments that will drive both one-time and ongoing campaigns; and is key to long term successful use of your tenant.

NAMING CONVENTIONS (QUERIES, SEGMENTS, CAMPAIGNS)

We recommend aligning on an organizational system that includes information which will make navigation and identification simple for everyone in the platform. Note: campaign names are often included in the file name that is delivered so clarity is key.

Consider establishing standardized naming conventions which include the following information:

- + Region (e.g. U.S.)
- + BU or Brand (e.g. Famous)
- + Audience Classification (e.g. Buyers, Prospects)
- + Channel (include if only for a specific channel)

USING FOLDERS

Folders are available for organizing Queries, Segments, and Campaigns. We'd recommend a clear plan from the start to avoid difficulty navigating.

When creating folders to manage segments, it is important to note that the Amperity tenant permits creation of 5 layers of folders and sub-folders.

Due to the limited number of folders, consider names that include multiple pieces of information:

- + Folder 1: Brand and Team (e.g. Brand_Paid)
- + Subfolder: Team and Channel (e.g. Loyalty_Email)

Example Folder Name: US_BRAND_CAMPAIGNS
Example Subfolder Name: EMAIL_SEGMENTS
Example Segment/Query Name: US_BRAND_LOYALTY_EMAIL_OPTIN

ADDITIONAL TIPS

Anyone can edit any query or segment, consider having a folder with your name for exploratory work.

Having a separate folder for each destination or marketing channel can help keep the segments and campaigns pages clean.

Consider including abbreviated identifier for purpose including things like PM for Paid Media or INTL for Internal Use.