



TRAINING COURSE CATALOG

VOLUME 2 - Q1 2024

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AUDIENCE BUILDER

Harness your audience data to create winning customer experiences. In these courses, learn how to create queries based on behavior and demographics, how to merge duplicate records with our Match Evaluation Tool, and how to query personalizations, form submissions and paid records.

AUDIENCE BUILDER



Audience Builder 101: Beginner

🕒 30 mins

In this course, you will learn how to use Audience Builder to segment your customers, including how to create queries based on email behavior, demographics and product membership.

- What is Audience Builder?
- How to Access Audience Builder
- Creating a Query
- Field Library
- Contact Rules
- Email Behavior Query
- Product Query
- Demographic Query

Audience Builder 201: Intermediate

🕒 1 hr 10 mins

In this course, you will learn how to use groups in an Audience Builder query, as well as create a query skittle, run reports and output a query. This course will also cover how to use the Match Evaluation tool.

- Audience Builder Groups
- Query Fields
- Match Evaluation
- Audience Builder Output
- Audience Builder Reports

Pre-Requisites:
Audience Builder 101: Beginner

Audience Builder 301: Advanced

🕒 1 hr

In this course, you will discover how to create advanced queries in Audience Builder.

- Query on Olytics Data
- Query on Behavior Data
- Query on Personalization
- Query on Form Submits
- Querying Dates

Pre-Requisites:
Audience Builder 101: Beginner
Audience Builder 201: Intermediate

Audience Builder Paid

🕒 30 mins

In this course, you will learn how to use Audience Builder to query paid records.

- Paid Fields in Audience Builder
- Query Auto-Renewal Records
- Query Pending Orders
- Query Graced Issues

Pre-Requisites:
Audience Builder 101: Beginner



AUDIENCE SEARCH

Query your database for the purpose of targeting communications and optimizing customer experiences. Search for customers to easily review and update their contact information, magazine/email subscriptions and order history, behaviors, demographics, and email permissions.

AUDIENCE SEARCH



Audience Search 101: Beginner

🕒 30 mins

In this course, you will learn how to use Audience Search to search for customers and make updates to their record. You will also learn how to add new customers and merge records.

- What is Audience Search?
- Help Screens
- Basic Search
- Advanced Search
- Preferences
- How to Add a Customer
- Updating Customer Records
- Viewing Customer Behavior
- Viewing Customer Deployments
- Deactivating Customer Records
- Merging Customer Records

Audience Search 201: Intermediate

🕒 45 mins

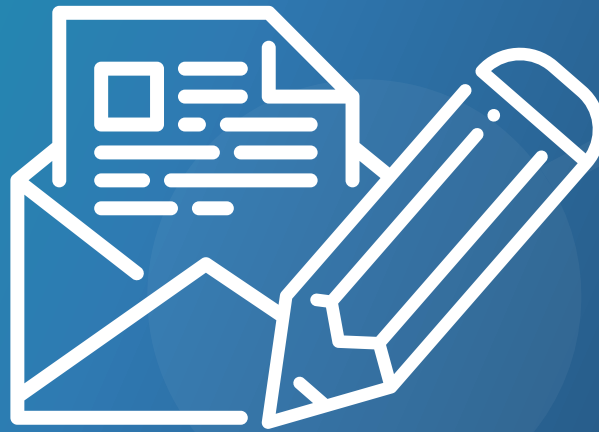
In this course, you will learn how to view subscription and transaction details, as well as renew and add subscriptions, adjust transactions, issue refunds and suspend/cancel subscriptions.

- Subscription Management
- Adding a New Product
- Single Copy Sales
- New Subscriptions
- Renewing a Subscription
- Adding a Payment
- Adjusting Transactions
- Suspending a Subscription
- Reinstating a Subscription
- Refunding a Subscription
- Canceling a Subscription
- Gift Subscriptions
- Invoices and Receipts

Pre-Requisites:

Audience Search 101: Beginner





EMAIL BUILDER

Seamlessly connect your campaigns to activate your audience more effectively. In these courses, learn how to create regular, triggered and recurring emails, conduct A/B tests, integrate dynamic content and set up a recurring email series.

EMAIL BUILDER



Email Builder **101: Beginner**

🕒 1 hr

In this course, you will learn how to use Email Builder to deploy a simple email, as well as resolve common errors.

- What is Email Builder?
- How to Access Email Builder
- Creating a Simple Email Deployment
- Solving Common Errors

Email Builder **201: Intermediate**

🕒 25 mins

In this course, you will learn how to send triggered emails and use A/B testing to test subject lines, from lines and message content.

- Triggered Deployments
- A/B Testing

Pre-Requisites:
Email Builder 101: Beginner

Email Builder **301: Advanced**

🕒 1 hr

In this course, you will learn how to integrate dynamic content in your email and set-up a recurring email series. We will also review how you can use our forward to a friend options and add stealth links into your emails.

- Dynamic Content
- Recurring Email Deployments
- Forward to a Friend
- Stealth Links

Pre-Requisites:
Email Builder 101: Beginner
Email Builder 201: Intermediate

Email Builder **Power User**

🕒 1 hr

In this course, you will learn how to use the advanced features in Email Builder.

- Deployment Defaults
- Web Tracking
- Preference Pages
- Optout Settings

Pre-Requisites:
Email Builder 101: Beginner
Email Builder 201: Intermediate
Email Builder 301: Advanced



EMAIL BUILDER

REPORTING

Measure your impact to maximize opens, clicks and conversions. In these courses, learn how to evaluate and optimize your email engagement and deliverability on Omeda — and how to diagnose key performance issues like email fatigue and click activity.

EMAIL BUILDER

REPORTING



Email Builder **Reporting 101**

🕒 35 mins

In this course, we will review how to access delivery and response statistics for your email deployments.

- Basic Email Reports
- Deployment Delivery Reports
- Summary Stats Reports

Email Builder **Reporting 201**

🕒 25 mins

In this course, you will learn how to use our more advanced email reports to further analyze your deliverability, list fatigue and click activity.

- Deliverability Reports
- Category Tracking Reports
- Click Activity Reports
- Clickbot Reports
- Other Email Deployment Reports

Pre-Requisites:
Email Builder: Reporting 101





ODYSSEY

Reach the right audience with the right message at the right time. In these courses, learn how to create targeted automated voyages on Odyssey, our marketing automation tool. Then we'll walk through our personalization features, including Content Recommendations, Issue Builder and on-page personalization messages.

ODYSSEY



Odyssey 101: Beginner

🕒 1 hr 15 mins

In this course, you will learn about Odyssey, Omeda's Marketing Automation platform. You will learn the basic features of this tool and how to create a simple welcome voyage.

- What is Odyssey?
- Odyssey Basics
- Odyssey Elements
- Saving and Scheduling Voyages
- Reporting
- Welcome Voyage Use Case

Pre-Requisites:

Audience Builder 101: Beginner
Email Builder 101: Beginner

Odyssey 201: Intermediate

🕒 25 mins

In this course, you will learn how to add a personalization to your Odyssey voyage, as well as use the split and A/B testing elements. This course will also cover how to query an Odyssey voyage in Audience Builder.

- Personalization Element
- Split Element
- A/B Test Element
- Form Submit Element
- Export Element
- Querying an Odyssey Voyage in Audience Builder

Pre-Requisites:

Odyssey 101: Beginner,
Personalization 101: Beginner

Odyssey 301: Advanced

🕒 30 mins

In this course, you will learn how to add metering and the marketplace elements to your Odyssey voyage. This course will also cover the fatigue filter and how to use dynamic content within emails sent from Odyssey.

- Global Settings
- Custom Templates
- Metering Element
- Facebook Ad Manager Element
- Facebook Events Manager Element
- Google Ad Manager Element
- AdRoll CRM Audience Element
- AdRoll Event Based Audience Element
- Fatigue Filter Element
- Dynamic Content

Pre-Requisites:

Odyssey 101: Beginner,
Odyssey 201: Intermediate,
Metering 101: Beginner



CAMPAIGN TOOL

Monetize your content, diversify your revenue streams, and maximize ROI with our Campaign Tool. In these courses, learn how to set up promo codes, upload and update existing promo codes, and create lead generation events in Omeda.

CAMPAIGN TOOL



Campaign Tool **Lead Gen**

🕒 20 mins

In this course, you will learn how to create a lead gen event to have recurring lists automatically output based on a segment query.

- Creating a Lead Gen Event
- Use Cases for Lead Gen

Pre-Requisites:

Audience Builder 101: Beginner

Campaign Tool **Promo Codes**

🕒 20 mins

In this course, you will learn how to create a new promo code in the campaign tool, as well as upload a list of promo codes and search for existing promo codes.

- Accessing the Campaign Tool
- Searching for Promo Codes
- Downloading Promo Codes
- Deactivating Promo Codes
- Creating a Promo Code
- Campaign Pricing
- Uploading Promo Codes





CUSTOMER DATA PLATFORM

Unify your first-party data to simplify your workflows and create more personalized, successful audience experiences. Learn how to navigate our CDP, set up website behavior tracking, query your website data, target content to website visitors with on-site personalizations, and monetize your content with meters.

CUSTOMER DATA PLATFORM



Olytics 101: Beginner

🕒 30 mins

In this course, you will learn about Olytics, an essential feature of Omeda's CDP solution. Olytics allows you to track the behaviors of your website users and connect these behaviors with the data stored in Omeda. This course will teach you how to add the Olytics scripts to your websites, test Olytics, query on Olytics data and run reports.

- What is Olytics?
- Olytics Actions, Behaviors & Tags
- Implementing Olytics
- Testing Olytics
- Querying Olytics Data in Audience Builder
- Olytics Reports

Personalization 101: Beginner

🕒 50 mins

In this course, you will learn how to display targeted content to your website audience directly on your site using personalization messages.

- What is Personalization?
- How to Access Personalization
- Types of Personalization
- Setting up a Personalization
- Personalization Messaging
- Click Tracking
- Standard Personalizations
- Exit Intent Personalization
- Scroll Trigger Personalizations
- Testing a Personalization
- Cloning a Personalization

Pre-Requisites:
Audience Builder 101: Beginner

Personalization 201: Intermediate

🕒 25 mins

In this course, you will learn how to create a GDPR personalization, as well as an in-line personalization. This course will also cover how to view the performance of personalization jobs.

- Global Settings
- GDPR Personalization
- In-line Personalizations
- Personalization Reports
- Personalization Queries in Audience Builder

Pre-Requisites:
Personalization 101: Beginner

Metering 101: Beginner

🕒 50 mins

In this course, you will learn how to use Omeda's metering tool to create paywalls and gate content on your sites.

- What is Metering?
- Meter Access & Landing Page
- Metering Sites
- Setting up a Meter
- Testing a Meter
- Cloning a Meter
- Meter Reporting

Pre-Requisites:
Audience Builder 101: Beginner,
Personalization 101: Beginner



DATA LOADER

Easily map and migrate contact data into your unified audience with Data Loader. In these courses, you will learn how to load data, set validation, matching and data integrity rules; send contact data from a third-party platform to Omeda via webhooks; and query your uploaded records in Audience Builder.

DATA LOADER



Data Loader

Web Hooks

🕒 15 mins

In this course, you will learn how you can send data from a third party platform to the Omeda database by using webhooks. This course will teach you how to create a webhook via Data Loader and map the data you are sending, as well as provide some best practices.

- What is a Webhook?
- Webhook Best Practices
- Supported Platforms
- Creating a Webhook
- Data Mapping



USE CASES

Learn how our clients leverage our platform's diverse tools to achieve specific goals. Discover how Omeda can empower your business to convert anonymous visitors, foster audience engagement, streamline support processes and deliver highly personalized content recommendation.

USE CASES



Use Case **Content Recommendations**

🕒 25 mins

In this course, you will learn how to use Omeda's Content Recommendations feature to recommend links to your website visitors. This tool will allow you to create a more personalized experience for visitors.

- How-To Configure Content
- Recommendations to Olytics Behaviors
- How-To Create a Content
- Recommendations Personalization

Pre-Requisites:
Personalization 101: Beginner

Use Case **How-To Use Issue Builder**

🕒 25 mins

In this course, you will learn how to use Issue Builder to balance your issue and identify the records you want to add or remove as part of your issue close.

Pre-Requisites:
Audience Builder 101: Beginner
Audience Builder 201: Intermediate

Use Case **Using Credspark to Grow & Engage your Audience**

🕒 25 mins

In this course, you will learn how you can leverage CredSpark to convert anonymous customers to known, engage your audience and append data to your records.

- What is Credspark?
- Embedding CredSpark Interactions on your Website
- Embedding Interactions in Personalizations/Email

Pre-Requisites:
Personalization 101: Beginner



ONBOARDING

New to Omeda? Get the background you need to reach your audience growth goals. Learn how to navigate the platform and use our support portal, plus best practices for structuring your data. We will also show you how to QC your forms, Olytics set-up and conversion data. We will also show you how to test your forms, verify your Olytics set-up is correct and QC your conversion data.

ONBOARDING



Onboarding **Discovery**

🕒 15 mins

This course is designed for new clients at the start of their onboarding journey. It includes a tour of the Omeda portal, instructions on how to use JIRA, our client support portal, an overview of frequently used Omeda terms and a summary of Omeda's products & solutions.

- Omeda Portal
- JIRA Client Support Portal
- Omeda Dictionary
- Omeda Product Overview

Onboarding **Launch**

🕒 20 mins

This course is designed for clients in onboarding as they start to think about how to structure their data in the Omeda database. It includes a review of the various ways that Omeda can ingest data, a walk-through of basic Audience Builder queries and a report overview.

- Data Ingestion
- Querying the Omeda Database
- Basic Reports

Onboarding **Testing**

🕒 15 mins

This course is designed to help clients in onboarding test their forms and the set-up of their Olytics scripts, as well as QC their data once the conversion has been completed.

- Testing your Forms
- Testing your Olytics Set-Up
- How to QC your Records



COURSE RECOMMENDATIONS

Not sure where to start with Omeda Academy courses? Check out our recommended courses based on your job type! We've created an ideal flow of courses to help focus your study as you get started.

EXECUTIVE MANAGEMENT



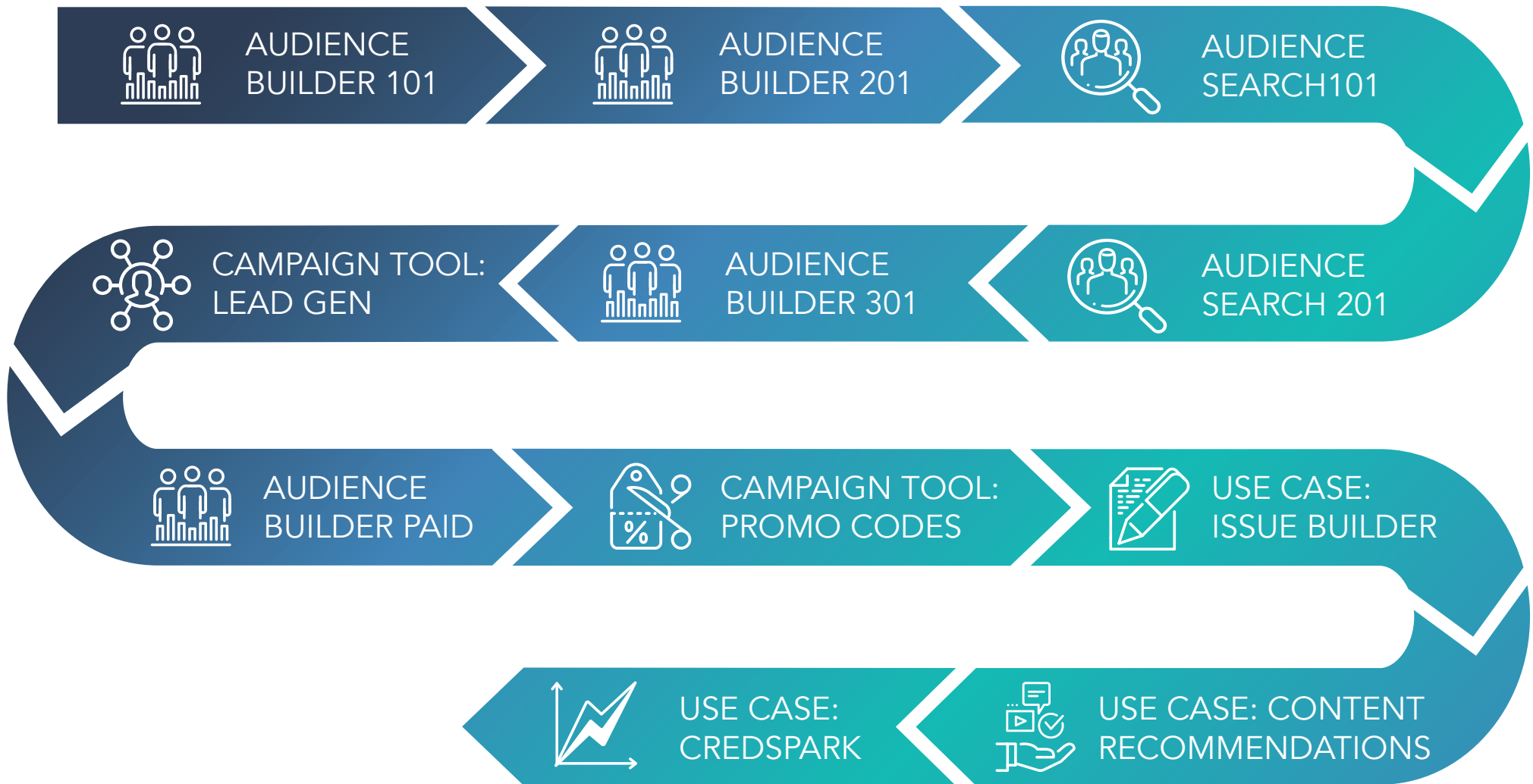
CUSTOMER SERVICE



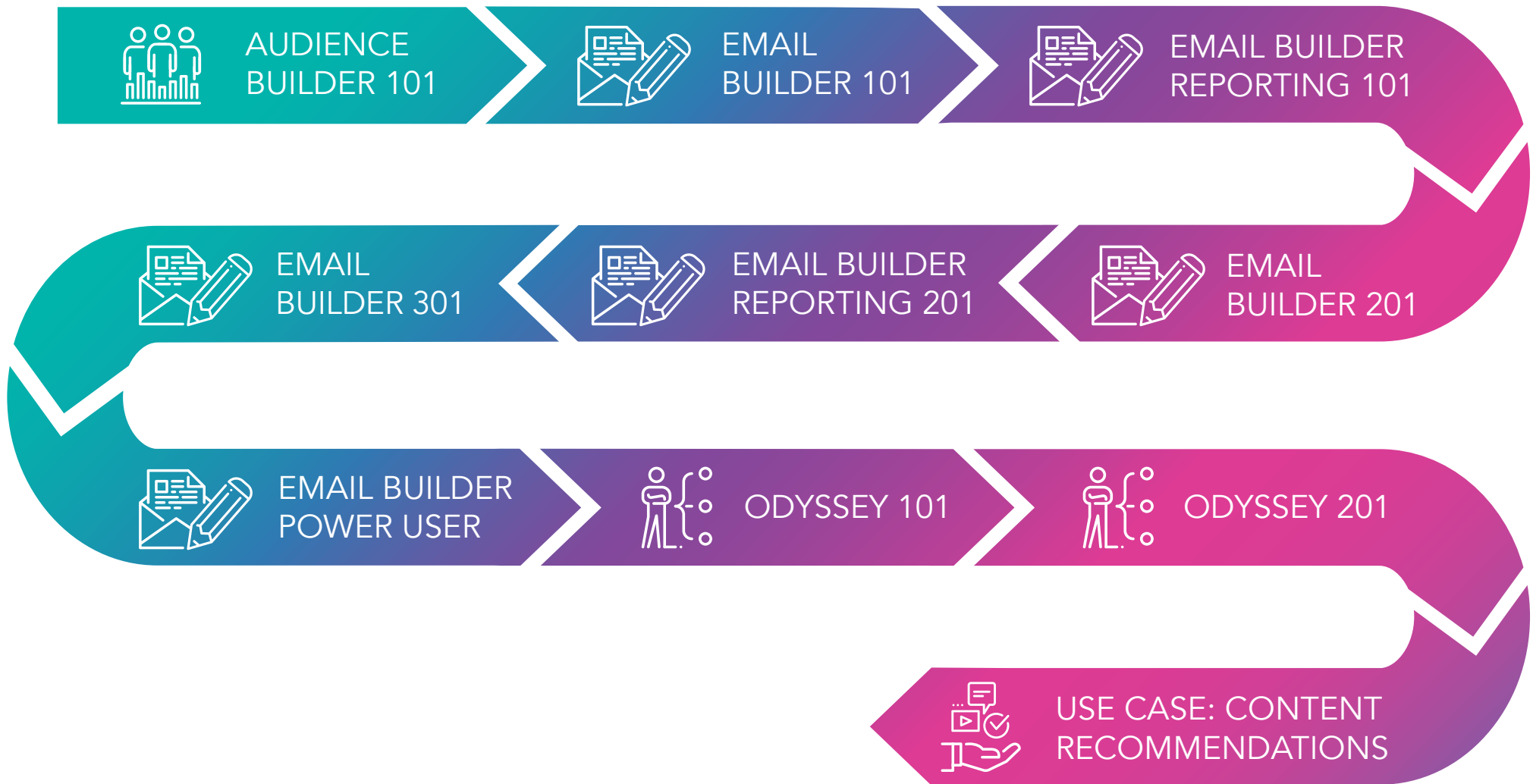
DIGITAL / TECHNICAL



AUDIENCE DEVELOPMENT



EMAIL MARKETING



MARKETING



AUDIENCE
BUILDER 101



ODYSSEY 101



ODYSSEY 201



PERSONALIZATION 201



PERSONALIZATION 101



ODYSSEY 301



METERING 101



USE CASE: CONTENT
RECOMMENDATIONS



USE CASE:
CREDSPARK