Total Expert Onboarding

The Total Expert Onboarding journey skillfully guides a new user of Total Expert through key features and benefits of TE. Targeted for end users, such as loan officers, it works equally well for any team member who wants to learn more about the platform. This journey automates the process of informing the recipient about how these particular components work and the value to a loan officer and their contacts.

How Do You Get This Journey Ready?

- This journey usually does not include multiple on-ramps and off-ramps. As designed, employees are assigned to the journey when they are added to the Employee group. They then exit the journey after receiving the final email in the journey.
  - Your organization can modify this approach by allowing employees to opt out or unsubscribe during the journey, but it is not a best practice.
- This journey, as designed, does not track success or failure for participants on the journey.
- This journey does not involve multiple groups of participants. It does not distinguish between roles of employees. Loan officers and sales team members may find this the most beneficial, but all employees will learn how their company is using the powerful automation of TE to reach prospects and clients.
- This journey does not incorporate tasks or notifications, which are common in other TE journeys. It shares details and resources about Total Expert without requiring follow-up steps or knowledge checks.
- Review the content of each email template to ensure that the messages you send out align with your organization's priorities and that they reflect features currently available to your end users.
  - In the journey, preview each email and any links or attachments.
    - Hover over the Send Email component in the journey and click the **Edit** button.
    - In the Event Settings panel, scroll down to the Email section and click **Preview**.
  - If an email does not apply to your organization, you can choose to edit the email or remove that step in the journey.
  - Many of the emails include brief video simulations or explanations. Review these so you are aware of all the information included in this journey.
- Determine the timing of each email.
  - The flow of emails is meant to drip new messages to the learner to keep them learning and engaged without overwhelming them.
  - If you want to adjust the timeline, adjust the parameters of the Timer Delay components.
- Determine who the specific sender of the emails should be.
  - The emails in the journey include signature information for the Marketing Admin user. You can alter this by selecting a sender profile, by adjusting the account settings for the Marketing Admin, or by removing the signature block from the emails.
- Determine the publishing settings for the journey.
  - Determine which user you will use to publish the journey. This is typically done using the Marketing Admin user.
  - Recommended journey settings include:
    - Activate for all users.
    - Allow users to stop this journey.