



# Total Expert Journey Fitness Checklist

## Tip

Stay on top of your journey effectiveness in Total Expert by using this checklist on all journeys running in the platform.

- Verify that your triggers are still working effectively. Do they need new data points to pull in the right audience?
- Use journey statuses and add additional statuses for points of reporting that are relevant to your team.
- Internal Notifications – Are they still relevant to your sales team? How can you make them more attention-grabbing?
- Email Marketing – How are your emails performing? Do they need adjustments to content to reflect any changes?
- SMS Messaging – Do you need to adjust the text messages going out to reflect guideline updates or marketing effectiveness?
- Cadence – Is there any adjustment necessary to when or how often communication is going out?
- Off-ramps – Do you need to introduce alternative ways for the client to off-ramp from the journey?

To make great decisions on your checklist above, please refer to Total Expert reporting functionality resources:

- Analytics – <https://totalexpert.freshdesk.com/support/solutions/articles/22000282755-how-to-view-analytics>
- Standard Reports – <https://totalexpert.freshdesk.com/support/solutions/articles/22000279673-most-popular-standard-reports>