Expert Campaign Configuration

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Introduction

Total Expert provides a library of best-practice journeys that are built to accommodate many customers. These are referred to as *Expert Campaigns*. These journeys are designed to be customized to each organization's specific goals, compliance requirements, and voice for messaging and marketing.

This document outlines the common configuration steps an administrator should consider for each journey. It is not intended to be a comprehensive list of best practices for each campaign type/topic, but rather an informational guide to reviewing and configuring Expert Campaign wireframes and their supporting content. Following the configuration overview below, there are specific examples of possible configurations or review points using real Expert Campaigns for the following industries: mortgage, banks and credit unions, and insurance.

> **Note**
> The instructions are written in general terms and assume that you are largely familiar with creating and editing journeys in Total Expert.

Expert Campaign Journey Configuration Overview

1. Total Expert recommends that you begin by copying the base journey. The system automatically adds `Copy of` to the name of the new journey. Go back to the journey list and find the original to edit.
    a. This enables you to refer to or revert to the original journey if necessary.
    b. Each Expert Campaign journey includes a brief description. You can leave this as-is or adjust it to your organization's specific configurations.
2. Define how contacts begin the journey (the "on-ramp").
    a. There may be multiple on-ramps (triggers), but not all of them are necessarily relevant to your organization. Choose which ones best fit your data and operations. There might only be 1.
        i. It is highly recommended to use automated on-ramps where possible to add contacts to journeys. For example, use the criteria that would add a contact to a group as the on-ramp rather than the group itself as an on-ramp.

    b. Review inline conditions on the triggers to isolate appropriate contacts and place guardrails ensuring contacts who should not be on the journey remain off. For example, guardrails often include date-related fields to prevent old or pre-filled dates from triggering a journey. Alternatively, you can add standalone condition components to route contacts into different paths.
    c. Review occurrence limits for the triggers. This acts as a gatekeeper and ensures that contacts or loans do not go through a journey more than the appropriate number of times. It is recommended to match occurrence limits in all journey components.
3. Define a successful path (primary "off-ramp").
    a. This should align with the campaign intent. For example, in a lead nurture journey, the off-ramp could occur when an application is started, a new loan or product is created, or at another specific milestone proving the campaign successful.
4. Define unsuccessful paths (alternative "off-ramps").
    a. Expert Campaigns will always include an "Email Unsubscribed" off-ramp as an unsuccessful path.
    b. Additional unsuccessful paths should be reviewed to align with your specific data points, such as loan or product statuses. For example, an adverse status of "Credit Denied" may be called something different in your organization.

Note
If contact management tools, such as focused views, pipeline views, or contact groups are a primary function of your users' process, it may be the most effective way of adding a contact to, or removing a contact from, a journey. Contact management tools should be configured prior to enabling a journey if they are the primary on-ramps.

5. Review and/or define group names for the journey.
    a. Contact groups can help users quickly identify which journeys a contact may be part of without reviewing all active journeys.
    b. Where appropriate, Expert Campaigns include predefined contact groups to help exclude contacts from other journeys. For example, in Birthday journeys, groups help avoid a contact being added to the journey multiple times during the multi-year campaign timeframe.
6. Review the content of each email, SMS, task, and user notification to ensure that the messaging aligns with your organization's standards.
    a. You can see previews of all communications in the relevant journey components. Open the settings for the component and click **Preview**.
    b. To make edits to an email or template snippet, you must identify and adjust the source via the appropriate editor in TE.
        i. You must use the email builder to create a new email template. Navigate to **Email Marketing → Emails** and click the **Create Email** button.
        ii. New SMS, user notifications, and task templates can be created directly from the journey component's settings panel.
    c. SMS components can remain in the journey structure, even if a specific user or your organization does not enable SMS. These components will simply be bypassed for users not using SMS.
    d. User notifications and tasks can be adjusted or removed altogether if they are irrelevant to your organization. For marketing automation–only customers, task outcomes should be removed.
7. Review all components and their settings.

    a. Configure any custom fields, organization-specific statuses, or otucomes for tasks and focused views.
    b. Inline conditions are recommended on trigger components to further define which contacts should or should not be added to specific campaigns. It is important to review and apply any organization-specific conditions.
    c. Confirm that fields accurately represent your organization's processes. This includes things like On Loan/Product Date and Status fields. Data points are configured based on common use cases but vary across organizations.
    d. Most Expert Campaigns are set up to send communications on behalf of the contact owner. In some cases, especially internal training or communication campaigns, it may make sense to update the sender to a single user such as the marketing administrator.
    e. Confirm that loan and product participant email messages include CCs or BCCs for the appropriate contacts and relationships.
    f. Confirm that the appropriate journey component is selected, such as Send Email to Loan Participant versus Send Email to Product Participant versus Send Email.
8. Update journey statuses to reflect what you would like to see in reporting.
    a. The default journey status names follow the formula: `[name of the journey] - [status]`.
        i. For example, if a journey is called `Journey Name`, the status used when the journey begins would be `Journey Name - Start`.
    b. Using the example above, the most common journey statuses are: `Journey Name - Start`, `Journey Name - End`, `Journey Name - Successful`, and `Journey Name - Unsuccessful`.
        i. The component name of any status change components includes information about the transition. For example, the name `Journey Status Change – Unsubscribe` with the `Journey Name - Unsuccessful` status allows you to report on both the unsubscribe and unsuccessful events.
9. Review timer or date delays.
    a. The times between emails vary and are based on the individual campaign intent. Feel free to adjust these intervals as you see fit.
    b. Timer delays may be impacted by data sync frequency. It is important to consider how often your data is updated and whether your timer delay settings and general use should change.
    c. Most Expert Campaign journeys use timer delays, but some user training and engagement wireframes are based on a launch or go-live date. These may use date delays to accommodate the communication intent.
    d. Determine the delay between the last communication and the Remove From Journey off-ramp. This should be the amount of time in which you consider a contact to be active on a specific campaign. For example, if a cross-sell campaign includes a 14-day delay after the last communication and a product is created in that timeframe, it is considered a successful conversion.
10. Test the journey using best practice testing techniques. See Additional Resources below for more information.
11. Determine publishing and availability to the organization.
12. Review the journey reports in the canvas.

   a. Reports can track activity based on individual component names. Expert Campaigns have unique component names to allow for more granular reporting. For example: `Send Email - Intro to Journey`. This allows you to track how many contacts went through the initial email send component.
   b. Another example is naming an off-ramp component `Journey Status Change - Unsubscribe` but the actual status change to `Journey Name - Unsuccessful`. This allows you to track both unsuccessful and unsubscribed activity.

Mortgage Example: Lead Purchase

For more information, see *Expert Content Strategy Guide - Lead Purchase Journey*.

1. Copy the base journey and save it for reference. Go back to the journey list and find the original to edit.
2. Define how contacts begin the journey (the "on-ramp").
   a. Adjust lead sources in the Contact Updated trigger to match organization-specific sources. It may be a contact created through an Open House Registration app or an external source.
   b. Create and configure an Outcome Selected trigger if that makes sense for your users.
   c. Determine whether you will add a Loan Status Change trigger for Pre-Approved or Pre-Qualified.
   d. Review the Occurrence Limit defaults and whether it makes sense to increase or decrease.
3. Define a successful path (primary "off-ramp").
   a. Review and determine whether Loan Created or Loan Status Change makes the most sense.
      i. Add inline conditions such as Loan Purpose is Purchase, Loan Status is Underwriting, and/or appropriate Loan Dates to match your organization's data sources.
4. Define an unsuccessful path (alternative "off-ramp").
   a. Review and confirm the Loan Status Change component for adverse statuses that match your organization's data sources.
5. Review and/or define group names for the journey.
   a. Confirm that Lead Purchase is the contact group used across the organization or adjust it.
6. Review the content of each email, SMS, task, and user notification to ensure that the messaging aligns with your organization's standards.
   a. Preview the content through the canvas and make any necessary changes. Find the email from your email list to make edits to the text or imagery. Confirm your preferred email signature is populating as expected.
   b. Remove touchpoints to shorten the journey timeframe, add new touchpoints to extend, and replace or edit content that does not fit for your organization.
7. Review all components and their settings.
   a. Review each component to ensure that inline conditions, statuses, CC/BCC recipients, and sending profiles are configured as desired.
8. Update journey statuses to reflect what you would like to see in reporting.
9. Review timer or date delays.
   a. Confirm that timer delays and processing windows align with your organization's standards.
10. Test the journey using best practice testing techniques.
    a. Use the Outcome Selected trigger to test a single test contact or assign them to the Lead Purchase contact group.
11. Determine publishing and availability to the organization.

12. Review the journey reports in the canvas.
    a. After publishing, create a new report and include components such as Change Journey Status - Start, specific Send Email components, Change Journey Status - End, and Successful and Unsuccessful Journey Status Change components such as Unsubscribe.

Bank & Credit Union Example: Onboarding

For more information, see *Expert Content Strategy Guide - Bank Onboarding*.

1. Copy the base journey and save it for reference. Go back to the journey list and find the original to edit.
2. Define how contacts begin the journey (the "on-ramp").
    a. Configure the Product Created trigger with relevant inline conditions.
3. Define a successful path (primary "off-ramp").
    a. Review and determine whether there should be triggers added such as contact value changes for adding mobile app, online banking setup, direct deposit, and eStatements. If all four have been set up already, it would make sense to remove the contact from the journey.
4. Define an unsuccessful path (alternative "off-ramp").
    a. Review and determine whether a closed account or other similar account status should be added to the journey.
    b. Unsubscribe off-ramps should be included in journeys with external communications.
5. Review and/or define group names for the journey.
    a. This journey begins with the contact being assigned to the "Onboarding" contact group. Review and adjust if your organization calls this something else.
6. Review the content of each email, SMS, task, and user notification to ensure that the messaging aligns with your organization's standards.
    a. Determine which set of emails aligns best with your organization's branding and voice. Adjust any of the messaging to fit even better.
    b. Links should be updated to align with your organization's specific app or direct website links.
7. Review all components and their settings.
    a. You might want to add sending profiles or determine which contact owner the emails are sent from. This can be adjusted in the Send Email components.
8. Update journey statuses to reflect what you would like to see in reporting.
    a. Journey Start, Journey Complete, and Journey Unsubscribed are the statuses used in this journey. Add a Journey Successful or Journey Unsuccessful status for additional off-ramps determined in the previous steps.
9. Review timer or date delays.
    a. Adjust timer delays to be shorter or longer, depending on your organization's preferred cadence.
    b. Review the processing windows and adjust them if your organization prefers to send during shorter or longer timeframes.
10. Test the journey using best practice testing techniques.
11. Determine publishing and availability to the organization.
12. Review the journey reports in the canvas.
    a. After publishing, create a new report and include components such as Change Journey Status - Start, Change Journey Status - End, and Successful and Unsuccessful Journey Status Change components such as Unsubscribe. You can also add each Send Email component to determine

whether contacts are going through specific email events or all 4 before being successfully removed from the journey.

Insurance Example: Policy Renewal

For more information, see [Expert Content Strategy Guide - Insurance Policy Renewal].

1. Copy the base journey and save it for reference. Go back to the journey list and find the original to edit.
2. Define how contacts begin the journey (the “on-ramp”).
   a. Adjust the On Product Date trigger to include specific policy types, if needed, and the correct product date field. Using policy expiration date is recommended. If your organization uses contact-level fields for this, replace the trigger with an On Contact Date trigger.
3. Define a successful path (primary “off-ramp”).
   a. Product Created or Product Updated triggers are recommended successful off-ramps. A new product created for the same policy type or an extended expiration date can be used to remove the contact from the renewal journey. If your organization uses contact-level fields for this, use Contact Updated for a similar off-ramp.
4. Define unsuccessful paths (alternative “off-ramps”).
   a. A Product Updated trigger is recommended for removing contacts if they close the policy within the renewal period. If your organization uses contact fields, use Contact Updated.
   b. Email Unsubscribed is also included in the unsuccessful off-ramps but can be removed if your organization does not use unsubscribes on renewals as an indicator of negative results.
5. Review and/or define group names for the journey.
   a. Your organization may determine a Renewal group is helpful while contacts are on this journey. Adding contacts to this group after the initial Journey Status change and removing them from the group before they are taken off the journey is recommended.
6. Review the content of each email, SMS, task, and user notification to ensure that the messaging aligns with your organization’s standards.
   a. Review each email template and determine whether the messaging and imagery align with your organization’s brand and voice.
   b. You can add dynamic tags such as policy type, policy number, or other identifying information to help refine the email for the contact and their specific policy.
   c. Apply your organization’s email signature or use the Expert Content signatures available in the Content Block Gallery in the email builder.
   d. Review and/or remove the user notification depending on whether your sales team or agents are actively logging in to Total Expert.
7. Review all components and their settings.
   a. You might want to add sending profiles or determine which contact owner the emails are sent from. This can be adjusted in the Send Email components.
8. Update journey statuses to reflect what you would like to see in reporting.
9. Review timer or date delays.
   a. Determine whether the email cadence aligns with your organization’s renewal period.
10. Test the journey using best practice testing techniques.
11. Determine publishing and availability to the organization.
12. Review the journey reports in the canvas.

   a. After publishing, create a new report and include components such as Change Journey Status - Start, Change Journey Status - End, and Successful and Unsuccessful Journey Status Change components such as Unsubscribe. You can also add each Send Email component to determine whether contacts are going through specific email events or all 4 before successfully renewing the policy.

Additional Resources

- Journey testing:
    - *Journey Testing Playbook*
    - *Testing Journeys – Basic Guidelines and Best Practices*
    - *Journey Testing: Course 1: Prerequisites*
    - *Journey Testing: Course 2: Creating a Test Plan*
    - *Journey Testing: Course 3: Test Execution & Validation*
- Journey publishing:
    - *Journey Publishing Settings*
    - *Assigning a Journey to Users and Teams – Simulation*
- General journey help materials:
    - *Creating a New Journey – Simulation*
    - *Journey Best Practices*
    - *Journey Component List*
    - *Journey Manual*
    - *Journey Planning Questions*
    - *Journey Statuses*

Journey & Campaign Categories

- Lead Nurture
- In-Process/Status-Based
- Post-Close/Anniversary/Reviews
- Cross-Sell
- Educational
- Customer Intelligence
- Internal Communications/User Training and Engagement
- Holiday/Events/Weather-Related (typically created using campaign builder)