



Journey Planning Questions

As you prepare to build a journey, it is important to plan out what the desired result for a contact on that journey would be and how to guide each to the desired result. As you think about the questions below, review the *Journey Component List* to construct the most efficient path toward a journey's goal. Remember that each journey in Total Expert is a means to an end, helping you drive more business.

The specific triggers, actions, conditions, and events mentioned below are commonly used examples, but you may use any available components to suit your purposes.

Planning and Triggers

- What is the goal of the journey?
 - Plan the steps that will best guide your contacts to this goal.
- When should a contact or loan begin a journey?
 - Add trigger: Contact Created, Assigned To Group, Loan Status Change.
- Would the contact's activity change how you would guide them toward the goal?
 - Add trigger with *Only for contacts already on this journey* option: Email Unsubscribed, Email Link Clicked, Journey Status Change.
 - Plan additional steps that will best follow from this activity.
- Are there exceptions to the set of contacts called by the trigger?
 - Add inline condition: Contact Value, Contact Source, Contact Is Silenced.

Notes

End of a Journey

- What constitutes success or failure for a contact or loan?
 - Plan and set success and failure metrics.
 - Add action: Change Journey Status.
 - Add action: Remove From Journey.
- Should leaving this journey put the contact on a different journey?
 - Add action: Assign Group.
 - Add action: Remove From Journey.

Notes



Main Steps: Actions, Conditions, and Events

- What types of communication best lead toward the goal?
 - Add action: Send Email, Send SMS.
 - Add action: Assign Task (make phone call, deliver print material).
- How many times should a contact hear from you?
 - High, medium, light touch.
- How frequently should a contact hear from you?
 - Add event: Timer Delay, Date Delay, Manual Stop Event.
- What intermediate milestones are relevant?
 - Create statuses to use in the journey.
 - Add action: Change Journey Status.
- Should anyone be notified at particular milestones?
 - Plan who should be notified and when.
 - Create the notification message.
 - Add action: Send User Notification.
- Are there organizing steps Total Expert can do for you?
 - Add action: Assign/Remove Group, Share/Assign/Push Contact, Add Note.
- Are there decision points that determine separate courses of action?
 - Add condition: Contact Group, Loan Status, Loan Purpose.

Notes

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