Journey Best Practices

Plan

- ☐ Set aside time to plan each journey.
- ☐ Identify an admin to be responsible for creating emails, call scripts, and so on.
- ☐ Review Expert Content messages and campaigns for compliance and edit as needed.
- ☐ Communicate the value of journeys and Expert Content early and often.
- ☐ Have a plan to announce new and updated journeys and Expert Content.
- ☐ Determine how users would most benefit from journeys and design them with those goals in mind.
  - ☐ Save valuable time.
  - ☐ Reduce missed opportunities.
- ☐ Identify which existing campaigns will be replaced by a journey.
  - ☐ Plan how to deactivate these campaigns without missing communication.
  - ☐ Ensure that existing contacts will not receive duplicate marketing materials.

For each journey, identify:

- ☐ The single, specific goal for each contact placed on the journey
- ☐ Which contacts should be placed on the journey, based on key characteristics (such as a lead group)
- ☐ Steps necessary to help those contacts achieve the goal
  - ☐ Specific journey components needed to represent those steps
- ☐ Communication methods and messages needed at each step
  - ☐ Any Expert Content that would be useful—individual messages or full campaigns

Build

- ☐ Make use of Expert Content emails and journeys.
  - ☐ Turn on Expert Content campaigns for “happy path” and follow-up communication.
  - ☐ Use individual pieces of Expert Content in journeys built from scratch.
- ☐ Create your own email messages when needed.
- ☐ Assign contacts to appropriate team members so journey messaging will appear to come from them.

Build Tips

- ☐ Give the journey a descriptive name. Save drafts often.
- ☐ Set journey statuses at key points of the contact’s experience.
  - ☐ Set success status to represent the planned goal and failure status to represent other outcomes.
  - ☐ Use these statuses at all endpoints.
  - ☐ Define clear and descriptive journey statuses.
- ☐ Use contact groups and the Assigned to Group trigger to begin a contact on a journey.
- ☐ Add contacts to relevant groups after each trigger and before each endpoint in the journey.
- ☐ At any endpoint, consider whether the contact should be triggered to begin another journey.
- ☐ Define clear names and descriptions for all components.
- ☐ Use tasks and emails in combination.
  - ☐ Check for an email address; if none, create a task to obtain one before sending a message.
  - ☐ Provide specific instructions, such as a detailed call script, when assigning a task.
- ☐ Use lead source as a condition to determine how a contact progresses on the journey.
- ☐ Include Manually Add Contact triggers at key steps to allow a contact to be added mid-journey.

Roll Out

- ☐ Set aside time to test each journey.
  - ☐ Test all parts of the journey before making it widely available.
- ☐ Give end users the choice to opt in to and out of published journeys.
- ☐ On initial rollout, encourage LOs to use journeys without modifying them.
- ☐ Start with simple journeys and use a pilot group before scaling up.
- ☐ Plan how to assign access to existing journeys for new users.
- ☐ Ensure all end users attend LO/LOA training.
- ☐ Monitor journey statistics and progress.