Testing Journeys

Basic Guidelines and Best Practices

Total Expert

This document is intended to help you evaluate the success of your journeys prior to making them available to any desired live users. It is to your benefit to carefully evaluate the various triggers, conditions, and actions across multiple users to ensure that you are achieving your desired business outcome through Journey Campaigns.

As part of this process, you will need to ensure that any data that you would use to evaluate your journeys closely resembles the actual data that you use within sales production at your organization. **If you have a member of your team that is dedicated to or closely understands your data, please consult with them on best practices for data handling within your organization.**

Contents

- ☐ Re-orient to what you are trying to accomplish with your journey
- ☐ Finalize journeys and prep accounts
    - Ensure that journeys you are testing have been built within your Marketing Admin accounts from which most journeys will be published
    - If you are not planning to publish these journeys for marketing admins, create plan to use test users within your organization
    - If you do not have test users within your organization, create one or more test users within your organization
        - *If you have constraints on the number of seats allocated to your organization, please reach out to your Implementation or Customer Success Manager to have your account limits temporarily suspended for testing purposes*
        - *You may find it beneficial to retain these accounts for journey testing or other features in the future, and may want to keep the expanded user count*
        - *Populate test user accounts with appropriate information (e.g. phone number, permissions, address, email, photo, etc.)*
- ☐ Check components of the journey prior to publishing
    - Validate that the correct template for emails/tasks/notifications is assigned to each desired step within the journey
    - Check recurrence settings on each step (e.g. can this step occur more than once on a journey?)
        - *If a step is fired on a journey for a contact without the ability for the step to recur, that contact will not pass through the step again*
        - *Be sure that the appropriate steps have the recurrence setting applied*
    - Validate that Successful Conversion Status and Failed Conversion Status have been assigned to the journey
    - Ensure that the descriptions you have provided properly reflect the step on the journey
    - Check the journey name(s) to ensure that you are publishing the right journeys to be tested
    - Correct (as needed) any steps that would not have a clear next action based on your journey
        - *If not corrected, these orphaned steps would leave the contact on the journey with no way on or off other than a manual removal*
        - *For example, if you have created two Task Outcomes back to back, this would orphan the contact on the journey, because there would be no additional task created to which the outcome could be assigned.*

        - ***Note:*** *You may want to leave these steps if they are related to in-journey triggers, such as interaction with an email, where there is no appropriate next action*

- ☐ Prepare necessary data elements to test the steps within your journey
    - Prepare data that would off-ramp a contact when added to Total Expert
        - *It may be beneficial to create several contacts with different data elements based on the journey conditions that are applied within the journey*
        - For example, if a contact can be sent down one path because they have an email address, you may also want to create a contact who does not have an email address to ensure that the branch of your journey after the email condition progresses as you would expect
    - Prepare data that would move a contact through a journey when added or updated within Total Expert
    - Provide data through typical import method (e.g. API or flat file) for that user/those users for whom the journey has been published
- ☐ Publish journeys specifically for desired test user(s) and/or team
    - It may be a good idea to test journeys across a different team to ensure that you understand how this will behave when contacts may be shared by multiple users within the system (e.g. agents, borrowers vs prospects)
    - It is a good idea to use an email address within the contact record that can be used again (e.g. an example Gmail account) and can receive emails to ensure that content is correctly rendered
    - Be certain you are only publishing for your desired users – do not select "Publish for All Users" unless you want the journey to be immediately available for every user within your organization
    - As a best practice, when publishing the journey for testing, you likely want to select "Allow users to trigger scheduled events on this journey" so that you can manually skip ahead and avoid waiting between any timer or date delays
        - *When publishing the journey for non-testing users, you may still select to prevent users from triggering scheduled events ahead of schedule*
    - It is also a good idea to publish the journeys that you are planning to use so that you can see how they interact with one another
        - *For example, if the same trigger is used in multiple journeys, but a contact should be offramped immediately from another journey, testing these together can show you how the contact would appear to the loan officer*
- ☐ Test various on-ramps for published users
    - Each location that a trigger is used to place a contact onto a journey

        - *This may involve importing contact and/or loan data, creating new contacts via Lead Capture App, or creating new contacts manually within Total Expert (this will depend on your triggers)*
    - How a manually-added contact should be placed into the journey
- [ ] Test sequence between on-ramps and off-ramps
    - Test the progression of the journey by either manually triggering or waiting for each step to occur within journey
    - Check journey conditions to ensure that the contact(s) proceed(s) to the correct next step on the journey
        - *It is to your benefit to test using multiple contacts with different data elements if you are using conditions on your journeys*
    - If emails are used, evaluate the email contents that are distributed to the contact
    - If loan participant emails are used, ensure that each loan participant who should have received an email did receive one
    - If loan participant emails are used, evaluate the emails being sent to loan participants to ensure that the right placeholders were sent
    - Check expected placeholders within the email against the email template and the values in the testing contact record
    - If SMS messages are used, check to determine that SMS is correctly configured for the user's account (e.g. phone number, payment method, etc.)
    - Import data to reflect next steps based on journey trigger/conditions
    - Test whether a contact should pass through a step more than once
    - Test whether a contact stops unexpectedly at any point in the journey
        - *Is the right data element being used as a condition?*
        - *Is a date or timer delay being used between steps?*
        - *Can a journey step occur more than once for each contact?*
        - *Can a user select to trigger events ahead of schedule as specified by the journey?*
        - *Is there a manual stop being used on the journey? If so, is there a way for the contact to progress to the next step?*
        - *Are the correct task outcomes appearing on each task?*
    - Check the contact record and Activity Stream to ensure that the contact shows the correct status and/or stage based on where they are in the journey
    - Check the Active Journeys – View Journey page for that specific journey to ensure that the contact(s) display(s) within the flow of the journey
    - Test in-journey triggers
        - *Validate journey events fire as needed*
        - *Validate that journey status changes which are used as journey triggers are firing the appropriate actions as needed*

        - *Validate journey email triggers are firing the appropriate actions as needed*

- ☐ Test all off-ramps
    - Validate what occurs when a contact is off-ramped by achieving the desired outcome (e.g. the Successful Conversion Status)
    - When a contact has fulfilled specific criteria that would disqualify them from the journey
    - When a contact has achieved the specified negative outcome of the journey (e.g. time-oriented, number of outreach attempts, etc. OR Failed Conversion Status)
- ☐ Test journey stats
    - Validate that a contact who has passed through the journey to the Successful Conversion Status is displayed within the Stats on the Active Journeys line for the journey
    - Validate that a contact who has passed through the journey to the Failed Conversion Status is displayed within the Stats on the Active Journeys line for the journey

Frequently asked questions

Why can't I publish my journey?

- If there is not a green checkmark under the Can Publish header for that journey within Journeys – Saved, it means that you're missing a setting within one of your journey steps.
- Go back to edit your journey and look for any steps that have a gray bar and yellow edit pencil.
- Correct these steps, save your settings, and ensure that the bar has changed from gray and the edit pencil has changed to green.
- Try republishing.
- If you still cannot republish, please contact support@TotalExpert.com.

Where did my journey go?

- If you haven't published a journey yet, it will appear under Journeys – Saved.
- If you haven't published a journey yet, but can, it will appear under Journeys – Available Journeys.
- If you've published a journey for yourself, it will appear under Journeys – Active Journeys.
- If you've published a journey for someone else, it will appear under their Journeys – Active Journeys.
- If you've unpublished a journey, it will appear under Journeys – Inactive Journeys.