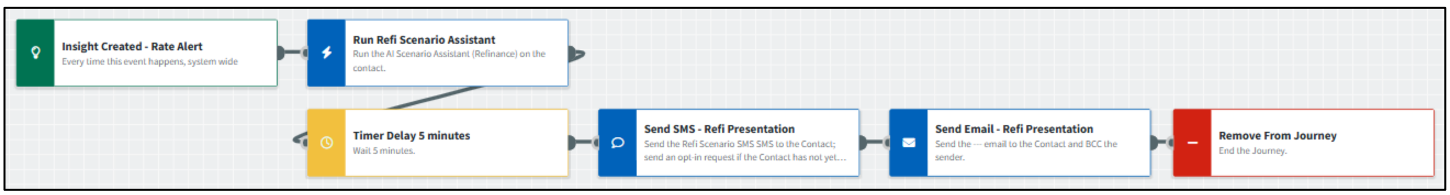
Scenario Assistant in Journeys - Playbook

This playbook provides details for setting up the Scenario Assistant in journeys. You will find information on configuring a fully automated process, a "human in the loop" process, and a process where the scenario is generated by the journey automation but sending it to customers relies on loan officer intervention. Note that the examples in this document are being triggered from a Customer Intelligence insight, but the trigger could be anything else, depending on how you're adding the Scenario Assistant into your existing journeys. These examples also show the contact being removed after the scenario is generated, which may or may not be true in your journeys.

Fully Automated Scenario Generation and Send

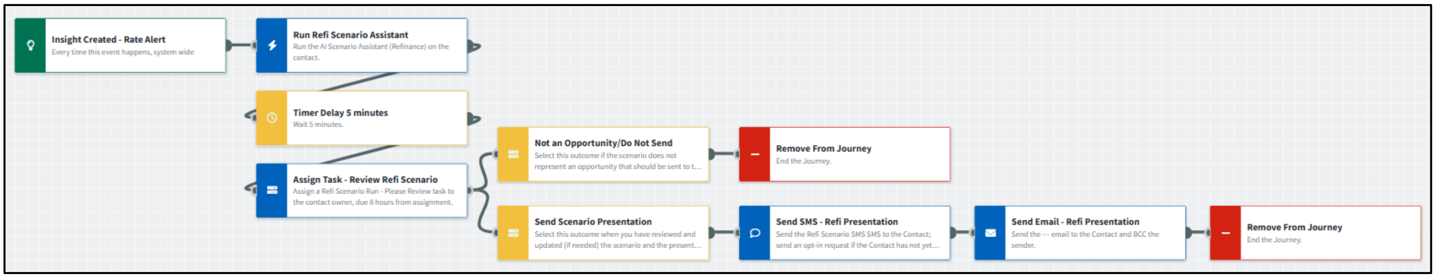
This configuration supports a fully automated process where the scenario presentation is being created and sent through the journey, with no intervention from loan officers.



1. Add the "Run Scenario Assistant" component following your trigger, or wherever appropriate. This component controls the generation of a scenario presentation on a contact record. Within this component, you choose from either the Purchase or Refinance use case.
2. Add a minimum 5-minute Timer Delay following the Run Scenario Assistant and before the text and email go out. This gives the scenario enough time to fully generate and create the presentation URL before the journey attempts to send the automated communications.
3. Next, add in a Send Email and/or Send SMS component, depending on how you want to send the presentation. The text message and/or email should contain the presentation variable {{ refi_agent.report_url }} or {{ purchase_agent.report_url }}, depending on the use case.
4. Loan officers will get an in-platform notification when the scenario is generated, but they will not be required to intervene.

Human-in-the-Loop Scenario Generation and Send

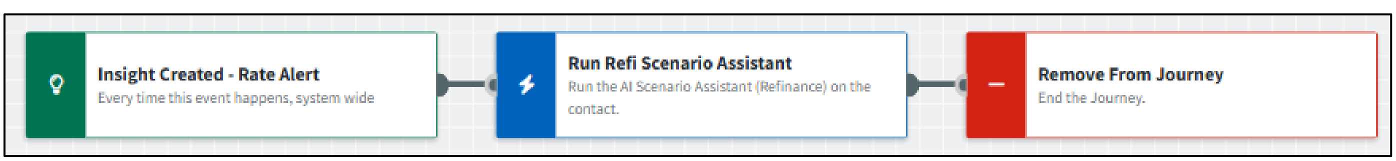
This configuration supports the scenario presentation creation via a journey but relies on the loan officer to review the presentation and complete a task outcome prior to the presentation being sent. If the loan officer does not complete the task or indicates a "no opportunity" outcome, the presentation will not end up being sent to the contact.



1. Add the “Run Scenario Assistant” component following your trigger, or wherever appropriate. This component controls the generation of a scenario presentation on a contact record. Within this component, you choose from either the Purchase or Refinance use case.
2. Add a minimum 5-minute Timer Delay following the Run Scenario Assistant and before the task is assigned. This gives the scenario enough time to fully generate and create the presentation URL before the loan officer is prompted to log in and review it.
3. Next, add task for the loan officer to review the presentation. The task description should clearly tell the loan officer that they need to complete the task in order for the journey pathway to continue.
4. The task should connect downstream to two task outcomes. In our example above there is an outcome to indicate the presentation was reviewed and can be sent to the contact. There is a second outcome to indicate no opportunity, after which the presentation would not be sent to the contact and the contact is removed.
5. Following the successful task outcome, add in a Send Email and/or Send SMS component, depending on how you want to send the presentation. The text message and/or email should contain the presentation variable {{ refi_agent.report_url }} or {{ purchase_agent.report_url }}, depending on the use case.
6. Loan officers will get an in-platform notification when the scenario is generated. They will also get a task notification if they have that turned on within their Account Settings page.

Automated Scenario Generation and Manual Send

Journeys can also support a more manual process for loan officers. The example below shows how you can set up the journey to create the presentation automatically, but no other actions are taken. The system will generate an in-platform notification, but if the LO does not choose to send the presentation themselves, it will not be sent to the contact.



1. Add the “Run Scenario Assistant” component following your trigger, or wherever appropriate. This component controls the generation of a scenario presentation on a contact record. Within this component, you choose from either the Purchase or Refinance use case.
2. Remove the contact from the journey.
3. Loan officers will get an in-platform notification when the scenario is generated.