Customer Insights - Journey

Guide and Best Practices

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# Introduction

In our guide on Customer Insights - Journeys, we emphasize the importance of mapping out the entire customer journey, spanning from initial discovery through to pre-deployment interactions. It's crucial to meticulously identify and optimize every touchpoint along this path, ensuring seamless engagement and maximum satisfaction. We advocate for the continuous collection and analysis of data at each stage, utilizing insights to refine and personalize the customer experience. By leveraging these insights, businesses can anticipate customer needs and consistently exceed expectations, fostering long-lasting relationships and driving success.

# Purpose

The purpose of this guide on Customer Insights - Journeys is to equip the project team with practical strategies and tools to enhance the customer experience throughout every phase of the journey. By understanding the intricacies of customer interactions and leveraging data-driven insights, the team can optimize touchpoints, streamline processes, and ultimately contribute to higher customer satisfaction and retention. This guide empowers the delivery team to implement tailored solutions that address customer needs and preferences, fostering stronger relationships and driving business success.

**Note:** The scope of this document is Real-time marketing. Event Planning is out of scope at the moment.

# Audience

**Pre-sales Team:** This guide equips the pre-sales team with insights to align our solutions with customer journeys, enhancing their ability to communicate value propositions effectively and tailor pitches to customer needs.

**Functional Consultants:** Functional consultants gain a deeper understanding of customer journeys, enabling them to configure systems that optimize the customer experience and align seamlessly with expectations, driving successful implementations.

**Development Team:** Developers leverage this guide to build technical solutions that enhance engagement and satisfaction along the customer journey, aligning their work with customer insights to deliver impactful features and functionalities.

**Testing Team:** With a comprehensive understanding of customer journeys, the testing team develops accurate test scenarios that reflect real-world interactions, enabling early identification and resolution of issues to ensure the quality and reliability of our solutions.

# History

|  |  |  |
| --- | --- | --- |
| Date | Changes | Comments |
| 07-Feb-2024 | First Draft | Initial draft created. |

# Author

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# Stage: Pre-sales

## Devices

1. Set customer’s expectations that we would rely on the OOTB pre-view results and would not entertain the results of any third-party tool like Litmus.
2. Set expectations that there are some issues with earlier versions of Outlook on Windows 10/11 and Gmail based on experience in other projects.

## General Requirements

1. Know the estimate count and the complexity of Email, Email templates, Journeys and type of journeys to be covered. Get a few sample emails/email templates. This is to know the kind of CSS style sheets that need to be developed.
2. If the email and email templates design should meet specific requirements which need good HTML/CSS resources, then it should be accessed during this stage, so that the resource planning can be done effectively.
3. Understand the personas who will access the application. Explain how security roles work.

# Stage: Requirement Gathering

## Devices

1. Set customer’s expectations that we would rely on the OOTB pre-view results and would not entertain the results of any third-party tool like Litmus.
2. Any issue experienced in the third-party tool will be resolved on a best effort basis.

## Security Roles

1. Get the details of the personas for the application.
2. Get details of the tables to be accessed by each persona.
3. Understand the business units and teams' requirements.
4. Access if there is a need for a Team/user-based security role(s).
5. Access if there is any group of users who should have access to records across business units.

## Domain

1. Get the Domain details which will be configured for Email, Brand Profile and Compliance Profiles. This should also include the **Reply to email** details.
2. If the Domains are already in use in another application(s), know when the switch will be done to Customer Insights – Journeys. This is needed for pre-release planning, schedule, execution and post release testing.

## Brand Profile

1. Know what Brand Profile records are to be created.
2. Get the values of **Name, From email** and **Reply-to-email**
3. Get what record will be the default.
4. Get Social media links and Theme, if applicable.
5. Discuss the naming conventions to be followed.
6. Discuss who will be the owner of each branch profile record.

## Compliance Profile

1. Know what Compliance Profile records to be created.
2. Know the **Consent Purpose** for each Compliance Profiles (e.g. Commercial, Transaction)
3. Know the **Topics** required for each Consent Purpose of a given Compliance Profile
4. Discuss the Topics, Logo, design of the Preference Center
5. Know if the customer should opt-in or out-out when the button is clicked on the Preference Center.
6. Confirm the text of the labels, buttons and other controls.
7. Discuss the naming conventions to be followed.

## Consent Point Center

1. How the consent point center records will be created. This should be known for initial load when the application will go live and at operational basis after the application has gone live and is in use.
2. What will be the source of the CPC records. Excel file, power automate flow, 3rd party tool/ other application/integration, etc.
3. At what stage of the business will the CPC records be created/updated, how and when? E.g. there might be a need to create CPC records when going live. The method of creation of this initial load can be different (via OOTB import utility) from the records created post live at the operation stage of the application (via power automate flow).

## Library

1. Discuss the naming conventions to be followed.
2. Discuss the tags to be added.
3. Know the source of the images, files etc. to be uploaded.

## Content Blocks

1. Discuss the naming conventions to be followed.

## Email / Email Templates

Discuss/Access:

1. The naming conventions to be followed.
2. The tags to be assigned to emails.
3. The applicable Subject, Preview Text, Compliance Profile and Brand Profile to each email
4. How many emails are to be created?
5. What will be the base source of Email and Personalization. E.g. Lead, Contact, CI etc.
6. The complexity of the email/template.
7. Audience of each email.
8. Will there be any hyperlink in email/template?
9. Will there be any dynamic link? What will be the condition of the dynamic link? How and when to set the dynamic link?
10. What personalization will be used and the source of the personalization.
11. Conditional Content in the email/template.
12. Owner of the email/template.
13. For Email: Identify the email templates to be used.
14. Target Devices / OS to be considered in particular during testing.
15. Identify the needs to customize email/templates. It is not easy to customize email/templates. There are multiple forms for email tables, which are combined into one single unit in the UI. You will need to identify the form that needs to be customized.

## Journeys

Discuss/Access:

1. The naming conventions to be followed.
2. Types of Journeys to be developed (Trigger based / Segment based)
3. Count of each type of journey to be developed.
4. What will be the trigger (including conditions), of the trigger-based journey.
5. What will be the source of the segment-based journey.
6. Steps / Emails to be configured for each journey.
7. **Goals, Exclusions, Repeats, Schedule, Exit** (trigger /segments) and **Frequency Cap** for each journey

## Triggers

Discuss/Access:

1. The naming conventions to be followed.
2. What will initiate the trigger.
3. Identify the variables to be created. The variables defined can be used in personalization and journey.

# Stage: Development

## Tables

1. Use OOTB attributes if needed.

## Domains

1. Never delete default Domains.
2. Make sure you copy all the keys while creating domains.
3. All domains can be used only when they are authenticated.

## Security Roles

1. Create a copy of the existing security roles and make changes as per the requirements.
2. Create Business units and Teams.
3. Unit test security roles as per the personas.

## Brand Profiles

1. Never delete default Brand Profiles.
2. Create senders in each Brand Profiles.

## Compliance Profile

1. Use OOTB Purpose first and then create the required purpose if needed.
2. While creating purpose make sure to use appropriate Consent Purpose.
3. Once created compliance profile, purpose and topic can’t be deleted. Label the unwanted compliance profile record with (Do not use) or (To be deleted) etc.
4. Add required purpose and topics in preference center page.
5. While using purpose or topics in preference center, make sure you are using it for opting in or opting out. Mention it in text form for user to understand.
6. In form setting after making the preference center live you can choose what text to be displayed from available options in form setting like thanks for submission etc.
7. If you change company address in email while using any compliance profile, then that address will be automatically changed in respective compliance profile.
8. Never delete default compliance profile.

## Consent Point Center

1. For creating the consent point center records through import wizard, create data map.

## Library

1. Add Tags to the files
2. Make sure that the naming conventions are followed.
3. After uploading the file, if known and required, change the owner of the file.

## Content Blocks

1. Add Tags for easy search of content blocks.
2. If you don’t want to edit the content blocks, then enable the **Protected** toggle otherwise you can disable it.
3. Use proper naming convention for content blocks.
4. Evaluate the email and email templates to know the content blocks to be created.
5. Identify the contents of the email / email template to be re-used and are candidate of being created as a Content Block.
6. Set them **Ready to send**, for using them in emails or email templates.

## Email Templates

1. Use Content blocks wherever required.
2. If you are initially using content blocks without setting any element before you may not find the content blocks available even if they are in ready to use state. If this situation occurs add any element and then add the content blocks and delete the element.
3. Use outer spacing so that all elements will be properly aligned for mobile view as well.
4. Add media code for various device types (e.g., iPad, mobile, etc.). Create CSS classes, if required, and use them at the element level for the target device view.
5. Set appropriate compliance profile.
6. Preview and test the email template, before use.
7. Use CSS classes for formatting as much as possible.

## Emails

1. Use Content blocks wherever required.
2. If you are initially using content blocks without setting any element before you may not find the content blocks available even if they are in ready to use state. If this situation occurs add any element and then add the content blocks and delete the element.
3. Use outer spacing so that all elements will be properly aligned for mobile view as well.
4. Add media code for mobile and create classes if required and use them at the element level for mobile view.
5. Set appropriate compliance profile.
6. Set appropriate brand profile and sender.
7. Use customer profile personalization for the emails which are used in segment-based journeys where the segments come from Customer Insights – Data.
8. Use {{CompanyAddress}} – to show Address from compliance profile.
9. Use {{PreferenceCenter}}– to show preference Center from compliance profile.
10. To use conditions, create them Inline conditions and copy the code and use it in HTML.
11. If you are testing on Litmus, remove any comments done in the <style> tags. Litmus mobile devices don’t understand comments and might not give expected results.
12. Use CSS classes for formatting as much as possible.
13. Preview and test the email template.
14. Check if the Personalization source is available and can be set.
15. Even during the development stage, if testing needs to be done in Litmus, continue to test emails for the results of the most expected clients.
16. While editing the email in the HTML editor, be cautious of editing the code. Incorrect code can give unexpected behavior or even can corrupt the email.
17. If you are unable to edit text box check in html code if this code exists data-sub-block="true" data-block-datatype="Text". Remove that and add this code data-editorblocktype="Text".
18. Don’t remove the code added by MS e.g. <style> <head>
19. Fill **Sender, From Name, from email Subject, Preview text, Reply to email, Compliance** and **Sender profile** details, if available.
20. Use @media code to style content for different media

## Segment Based Journeys

1. Define and follow the naming conventions.
2. Choose appropriate segments.
3. Set appropriate audience.
4. Set **Start date** but don’t set end date until it is necessary. If you have mistakenly set **End date,** then change the audience and the appropriate set of audience again.

## Trigger Based Journeys

1. Define and follow the naming conventions for the journey and the variables.
2. Identify the source of data that will provide the value to the variables created in the trigger.
3. Identify what will initiate the trigger. Make sure that the values are passed to the variables defined in the trigger, when it is called. If the values are not passed, the trigger might be initiated but not executed or give expected results. E.g. while calling a trigger from power automate, pass values to the variables defined in the trigger, including the value of the audience record (e.g. lead, contact, CI contact) so that the journey step can be associated with audience.

## Important to remember

1. Do not delete the defaults such as Default compliance profile, Default brand profile etc.

# Stage: Testing and Bug fixing.

## Devices

1. Confirm the target platform and devices for testing in 3rd party tools like Litmus.
2. Inform customers that the verification and fixing of the issue in 3rd party tools are on best effort basis.
3. Identify the edge cases which cannot be tested/fixed and highlight this to the project/business.

## Domain

1. Confirm if the domain change has been made.
2. Check if CNames have been verified.
3. Check the values of **External form hosting** and **Email sending** are enabled
4. Check the owner of the Domain records. Change owner as required, to the user/team as per the directions of the business.

## Security Roles

1. Login with respective personas and verify the functionality:
   1. As a logged in persona can you Read, Create, Edit, Delete, Assign records?
   2. Are you able to access the records assigned to you/your business unit/team you are a member of?
   3. Are you able to open dashboards and see reports/analytics data etc.?
   4. If possible, use tools like level-up (like impersonate) to test security role as per the a given persona.
   5. Are you able to complete a business process by performing steps as different persona? E.g. an email is created by an agent, reviewed and approved by the manager.

## Brand Profiles

1. Check, if naming conventions have been followed
2. Check **Sender** records have been created with correct values.
3. Check the owner of the Brand Profile records. Change owner as required, to the user/team as per the directions of the business.

## Compliance Profile

1. Check, if naming conventions have been followed
2. Check the company address.
3. Check the owner of the compliance profile. Change owner as required, to the user/team as per the directions of the business.

## Consent Point Center

1. On receiving test email verify:
   1. **Sender, From Name, from email Subject, Preview text, Reply to email, Compliance and Sender profile**
2. Do a smoke testing of the records to be created as initial load.
3. Do a smoke testing of the records to be created post live.
4. Get access to external applications/tool for initiating the record creation/updating process.
5. Understand the business process for record creation/updating process at post live stage. Verify if the process works or not.
6. Identify the edge cases which cannot be tested and highlight this to the project/business.
7. Check the owner of the CPC records. Change owner as required, to the user/team as per the directions of the business.

## Library

1. Check, if naming conventions have been followed
2. Check the tags assigned to the assets.
3. Check the owner of the library records. Change owner as required, to the user/team as per the directions of the business.
4. Create a test email and check if the images are available and uploaded as per the logged in persona.
5. Delete the test email later.

## Content Blocks

1. Check, if naming conventions have been followed
2. Check the tags assigned to the content blocks.
3. Check the owner of the content blocks. Change owner as required, to the user/team as per the directions of the business.
4. Check the required content blocks have been set to **Unprotected**

## Email Template

1. Use OOTB preview and test feature, first to verify the templates.
2. Use **Test send** feature before going live
3. Create email from templates. Check the fields mentioned in point # 4 below are populated.
4. Check if the Unsubscribe / Preference center links are working or not.
5. Confirm **Sender, From Name, from email Subject, Preview text, Reply to email, Compliance and Sender profile** details, if available.
6. Check the owner of the email templates. Change owner as required, to the user/team as per the directions of the business.
7. Identify the edge cases which cannot be tested and highlight this to the project/business.

## Email

1. Use OOTB preview and test first to verify the email and templates.
2. Create a **copy** of the email for testing. Don’t change the status of the original email to **Ready to send** for testing. Testing on the original email will generate statistics which will not show the real state of affairs to the business.
3. Use **Test send** feature before going live and verification in 3rd party tools.
4. Fill **Sender, From Name,** **From email Subject, Preview text, Reply to email, Compliance and Sender profile** details, if available.
5. Identify the acceptance criteria. Know before had, what will be the format of the email, values of personalization, Unsubscribe links, other links, From Email, No reply etc.
6. Check the owner of the emails. Change owner as required, to the user/team as per the directions of the business.
7. Check if the Unsubscribe / Preference center links are working or not.
8. Check the alignment of the contents, font-size, visibility, orientation of the contents in various desktop and mobile clients.
9. Check if the positions of the controls are as expected. It has been observed that controls e.g. buttons on older Outlook version in Windows 10 don’t show up properly. Below are some of the issues that have been experienced.
   1. First button doesn’t show
   2. Buttons with **Fit to text** enabled don’t show up properly. The text and the button body are misaligned.
   3. The color of button(s) are set to white and the text is not visible in dark mode.
   4. Buttons are moved down or up from the expected place.
10. Identify the edge cases which cannot be tested and highlight this to the project/business.

## Segment Based Journeys

1. In case of segments based on CI, create a test segment in CI with dummy email or personal/official email address to test.
2. Create a copy of the segment for testing. Don’t use the original journeys created for go-live.
3. In the journey, create a copy of the emails and refer to the copied emails instead of the original emails.
4. Change the wait time to minimum unit e.g. 1 minute so that the journey moves forward.
5. In case of any conditional steps, make sure the conditions can be tested for positive and negative scenarios.
6. Check the journey for each branch configured.
7. Check the owner of the journeys. Change owner as required, to the user/team as per the directions of the business.

## Trigger Based Journeys

1. Identify the scenario which will trigger the journey
2. Create a copy of the Journey for testing. Don’t use the original journeys created for go-live.
3. In the journey, create a copy of the emails and refer to the copied emails instead of the original emails.
4. Change the wait time to minimum unit e.g. 1 minute so that the journey moves forward.
5. In case of any conditional steps, make sure the conditions can be tested for positive and negative scenarios.
6. Check the journey for each branch configured.
7. Check the owner of the journey. Change owner as required, to the user/team as per the directions of the business.

# Stage: Pre-deployment.

## Common considerations at this stage

1. Confirm the record owners are set as per the business guidance.
2. Required cleanup has been done. Please refer to the Excel sheet below for cleaning up the records



## Domain

1. Confirm that they are working and have been assigned to Brand Profile and Email

## Security Roles

1. Users/Teams have been created as expected.
2. Confirm that the required teams and users have been assigned the required security roles.

## Brand Profile

1. Confirm that the Brand Profiles have been set in the email.

## Compliance Profile

1. Confirm if the Company Address, Purpose, Topics and Preference Center are setup correctly and no changes are required.

## Consent Point Center

1. All the initial data load has happen and the process to create/update the CPC records post live are set up.

## Library

## Content Blocks

1. The Content blocks approved for release are set to **Ready to send**

## Email Template

1. The templates approved for release are set to **Ready to send**

## Email

1. **Brand Profile, Sender, From Name,** **From email Subject, Preview text,** **Reply to email, Compliance and Sender profile** are set up correctly.
2. The emails approved for release are set to **Ready to send**

## Segment Based Journeys

1. Change the segments to the target segments
2. Set the Schedule Start date, End date, Time Zone etc.
3. The journeys approved for release are set to **Live**

## Trigger Based Journeys

1. The journeys approved for release are set to **Live**