

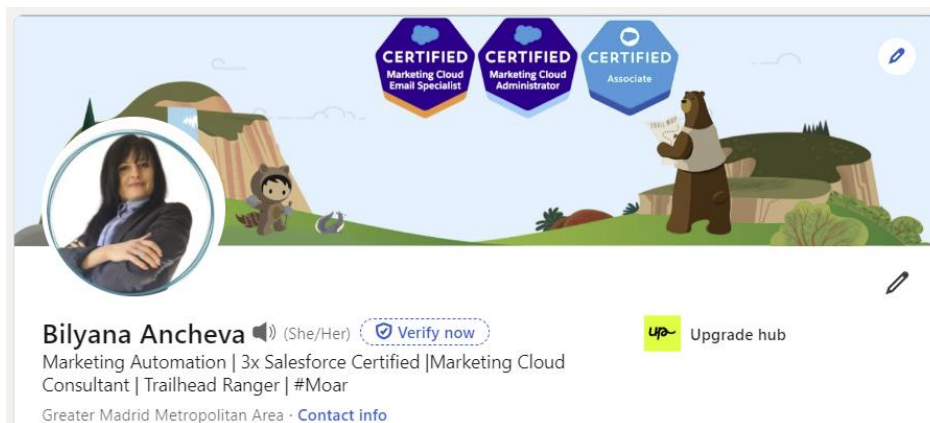
WELCOME JOURNEY FLOW

Journey Builder Salesforce Marketing Cloud

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Year 2022

About Bilyana Ancheva



WELCOME JOURNEY only DRAG AND DROP

DOCUMENTATION

COMPANY DEPORTES PUEBLO

(Disclaimer: the company does not exist in real world and is created only to showcase my skills for the creation of the Welcome Journey in Journey Builder)

this Welcome Journey for Deportes Pueblo ensures a structured approach to nurturing new subscribers and driving measurable results, because it aligns the journey flow, business goals, and success metrics.

Business Requirements

1. Functional Requirements

- **Data Management:**
 - Data Extension fields: SubscriberKey, EmailAddress, FirstName, LastName, OptInDate, Interests, Engagement Status.
 - Ensure dynamic content in emails is personalized based on user interests.
- **Journey Builder Activities:**
 - **Entry Source:** Use "Deportes Pueblo Welcome List."
 - **Wait Activities:** Set appropriate delays between emails.
 - **Decision Splits:** Determine user engagement and segment accordingly.
- **Email Content:**
 - Use mobile-optimized templates.
 - Include brand colors, logos, and clear CTAs.
 - Ensure emails meet accessibility standards.
- **Exit Rules:**
 - Define rules for early journey exit (e.g., post-purchase).

2. Business Goals

- Build brand recognition and trust with new subscribers.
- Increase customer engagement and encourage first-time purchases.
- Segment the audience based on engagement for future targeting.

3. Success Metrics

- **Email 1:** Open Rate > 35%, Click-through Rate > 10%.
- **Email 2:** Conversion Rate > 8%, Decision Split Engagement > 50%.
- **Email 3:** Recovery of low-engagement subscribers > 20%.

- **Overall Journey:**

- Bounce Rate < 5%.
- Unsubscribe Rate < 1%.
- First-time purchase rate increase by 10%-15%.

4. Compliance Requirements

- Adherence to GDPR, CAN-SPAM, or applicable data privacy laws.
- Provide clear opt-out options in all emails.
- Ensure data handling complies with Salesforce Marketing Cloud best practices.

Journey Insights and Mapping

Stage	Activity	Objective	Key Metrics
Welcome Email	Email 1	Establish connection, welcome the user.	Open Rate, Click-through Rate
Engagement Check	Decision Split	Identify high vs low engagement.	Split Engagement Rate
Personalized Offer	Email 2	Drive interest with discounts and recommendations.	Conversion Rate, Click Rate
Final Reminder	Email 3	Create urgency and drive conversions.	Recovery Rate, Final Conversion Rate

1. Data Extension Entry

- **Entry Source: Data Extension (DE)**
 - A new subscriber or customer data is stored in a Data Extension
- **Fields in DE:**
 - SubscriberKey (unique identifier)
 - EmailAddress

- FirstName
 - LastName
 - OptInDate (date the user subscribed)
 - Interests (e.g., Running, Soccer, Gym)
- **Entry Event:** A new row is added to this DE when a user subscribes through the website or app.

2. Journey Structure

Step 1: Welcome Email

- **Email 1: Welcome to Deportes Pueblo**
 - Purpose: Thank the subscriber for joining and introduce them to the brand.
 - Key Content:
 - Warm welcome message.
 - Brief overview of the brand's offerings.
 - Highlight popular categories (e.g., "Shop Running Gear", "Explore Soccer Equipment").
- **Wait Activity:** Wait 3 days before moving to the next step.

Step 2: Personalized Offer Email

- **Email 2: Your First Discount!**
 - Purpose: Provide a 10% discount as an incentive.
 - Key Content:
 - Personalize email using FirstName.
 - Include a dynamic section showing products related to the user's interest (e.g., Running or Soccer).
 - Highlight the expiration of the discount (e.g., "Valid for 7 days").
- **Decision Split:**

- Check if the user opened **Email 1** and clicked a link.
 - **YES:** Add to a "highly engaged" branch where a product-specific follow-up will be sent.
 - **NO:** Add to a "low engagement" branch, adjusting tone and content (e.g., "Don't Miss Out on Your Discount").
- **Wait Activity:** Wait 5 days before sending the next email.

Step 3: Reminder Email

- **Email 3: Last Chance for Your Discount**
 - Purpose: Create urgency to use the provided discount.
 - Key Content:
 - Reminder of the expiring discount.
 - Call-to-action: "Shop Now and Save."
 - Testimonial or social proof about DEPORTES PUEBLO's products.
 - Sent to both "highly engaged" and "low engagement" users, with slight variations in content tone.

3. Settings in Journey Builder

1. **Email Channel:** Select previously created templates for the three emails.
2. **Exit Criteria:**
 - If a subscriber makes a purchase during the journey, they exit the journey to avoid redundancy.
3. **Journey Re-entry:**
 - **Re-entry anytime** is enabled if the subscriber unsubscribes and re-subscribes.
4. **Decision Split Logic:**
 - Set criteria for engagement using open rates and click behavior.

4. Metrics for Campaign Evaluation

To measure the success of the campaign, I track the following metrics:

- **Email 1:**
 - Open Rate (Goal: 35% or higher).
 - Click Rate (Goal: 5%-10%).
- **Email 2:**
 - Conversion Rate (Goal: 8%-12%).
 - Engagement in Decision Split (users clicking interest-specific links).
- **Email 3:**
 - Final Conversion Rate from low-engagement users (Goal: 3%-5%).
- **Overall Journey Metrics:**
 - **Bounce Rate:** Keep below 5%.
 - **Unsubscribe Rate:** Keep below 1%.
 - **ROI:** Calculate based on purchases driven by the campaign.
- **Engagement Segmentation:**
 - Identify "highly engaged" vs. "low engagement" segments for future campaigns.

JOURNEY CONSTRUCTION

Email 1

I HAVE CREATED FOLDERS IN CONTENT BUILDER TO UPLOAD IMAGES AND STORE THE READY EMAILS

The Emails created contains several blocks:

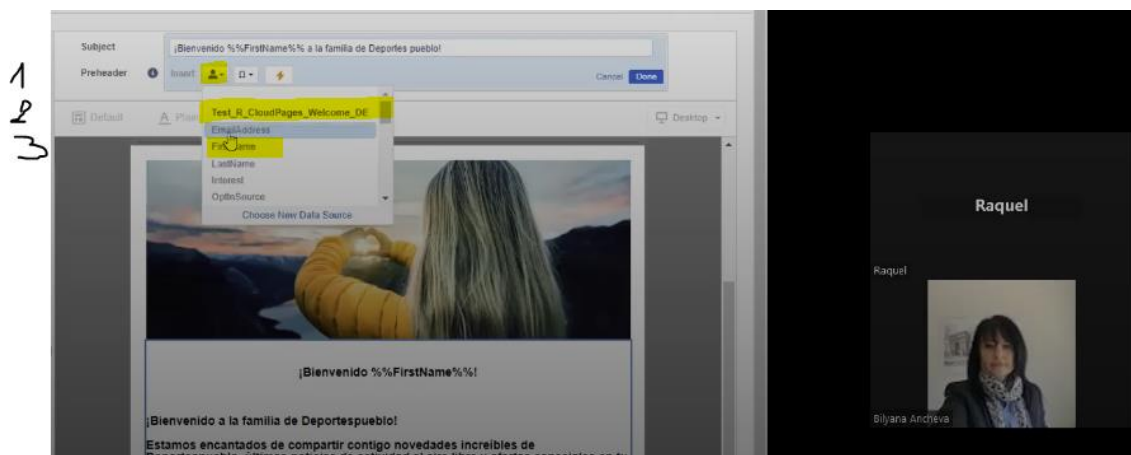
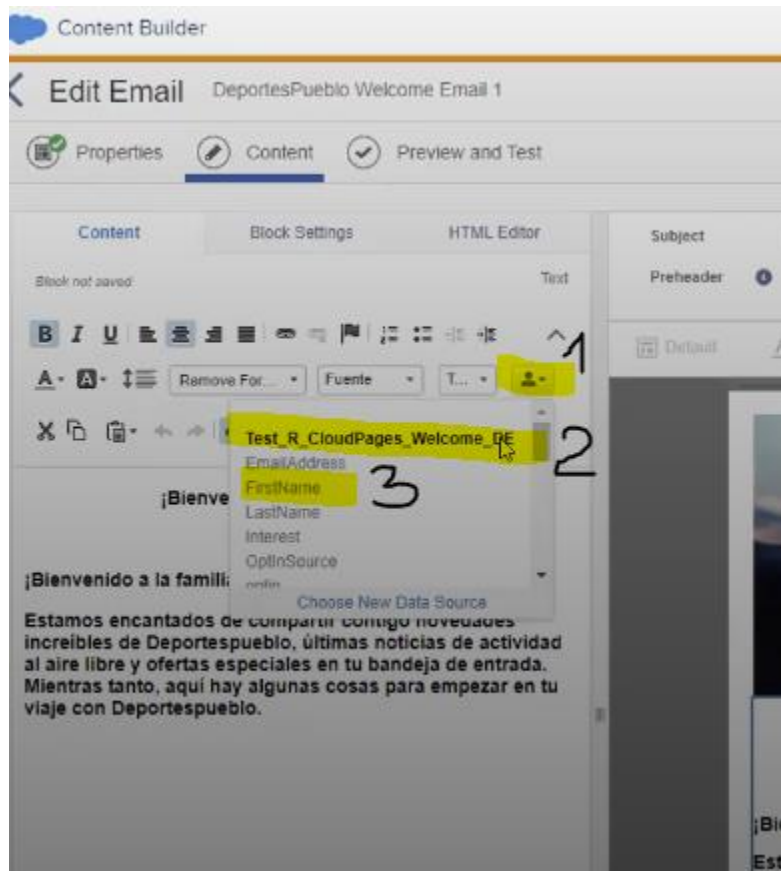
Image Block above

Layout- Header image + Text Block with Personalization String for the customer's name

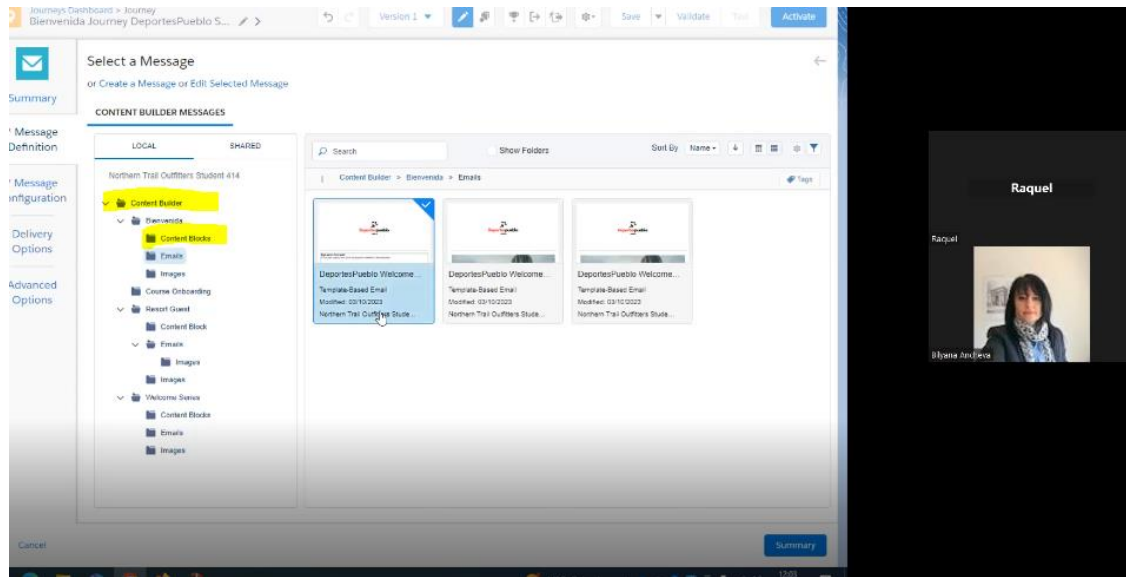
The personalization string is assigned from the Icon marked in the image as n° 1.

n°2 on the image below stands for the data extension that will be used

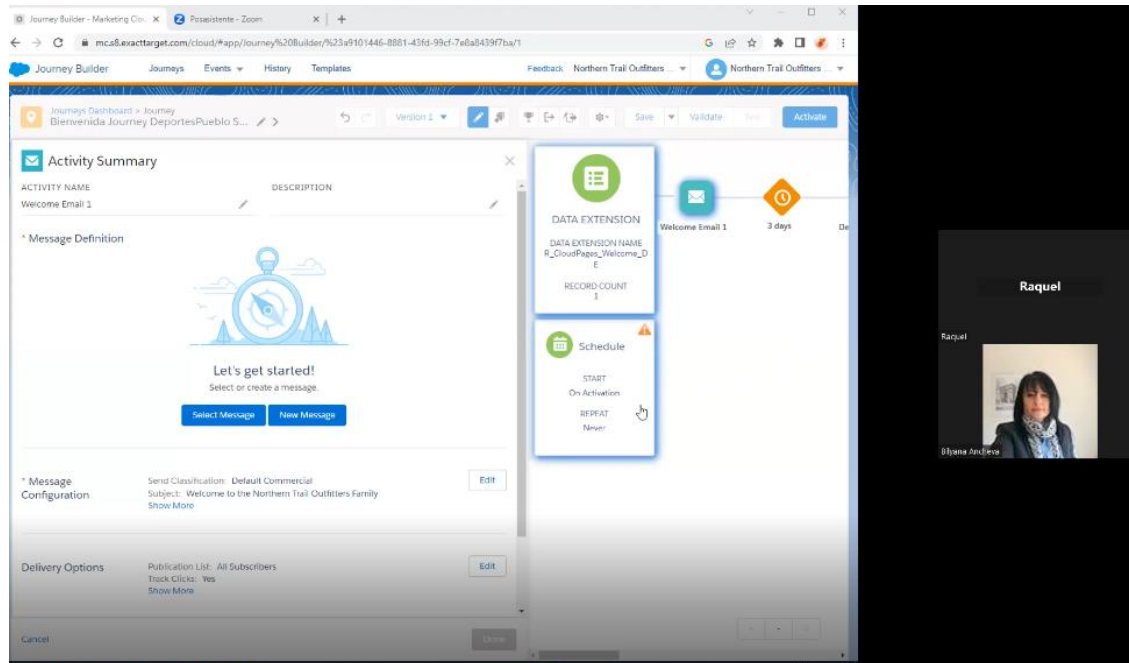
nº3 is the Attribute for the personalization string



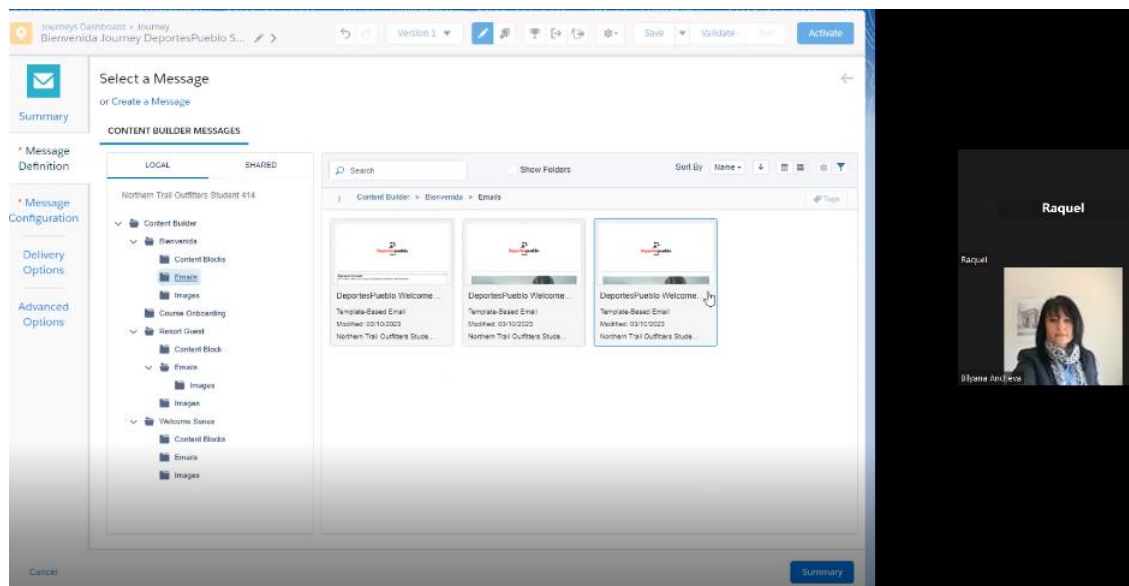
The Subject and Preheader also can be personalized with String in the same way



From Journey Builder I click on the EMAIL icon on the canvas to select the email message.
From SELECT MESSAGE I choose the desired email designed, select it, button DONE



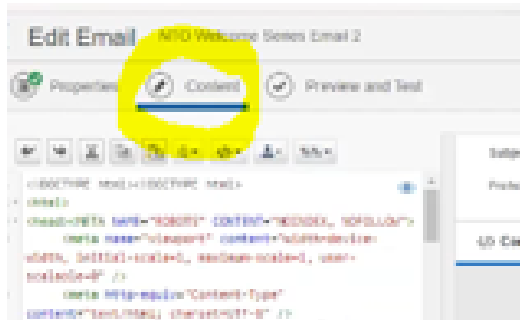
Email Studio I select the previously created Email



Email 2

Click over Email 2 on the Canvas

To paste a ready HTML I go under Content *2nd tab marked in yellow



Click on Data Extension to assign the Filter attribute where in this case we want to make sure that the clients have an Opt-in to receive communications. The Optin Attribute is included in the Data extension used as a Data Type Boolean, true or false. So only the subscribers with Optin TRUE will be allowed to enter the Journey. Drag the Optin to the right and assign it equal to True.

Journeys Dashboard > Journey
Bienvenida Journey DeportesPueblo S...

Version 1

Save

Summary

* Data Extension

Filter Contacts

Filter Contacts

Optional: Drag and drop Contact attributes to build a filter that determines who enters the Journey

Attributes	
Search	
R_CloudPages_Welcome_DE	
EmailAddress	TEXT
FirstName	TEXT
LastName	TEXT
Interest	TEXT
OptInSource	TEXT
optin	BOOLEAN

Filter Criteria

Drag attributes here...

These criteria help determine which contacts from the select population will be included in the audience.

> Filter Text

Important in Journey Builder is to click frequently SAVE the journey because JB does not automatically save it.

Button Validate when all the journey is created,

The image displays two screenshots of the Journey Builder interface, illustrating the process of validating a journey before activation.

Top Screenshot: The interface shows the 'Journey Builder' dashboard for a journey named 'Bienvenida Journey DeportesPueblo S...'. The 'Validate' button is highlighted in yellow. The journey flow diagram on the right shows a sequence of steps: 'DeportesPueblo Welcome Email 1' (Email), '3 days' (Wait), 'Decision Split' (Decision), 'DeportesPueblo Welcome Email 2' (Email), '3 days' (Wait), and '1 Join' (Join). A 'Profile Complete' event is also shown.

Bottom Screenshot: The 'Validate' button has been clicked, and the journey flow diagram is updated. The flow now includes: 'Decision Split' (Decision), 'Complete your profile Email 2' (Email), '3 days' (Wait), '1 Join' (Join), 'Welcome Email 3' (Email), '2 days' (Wait), and 'Click Welcome Email 3' (Click). The 'Profile Complete' event is also shown.

Both screenshots show the 'ENTRY SOURCES' and 'ACTIVITIES' panels on the left, and the 'Flow Control' section at the bottom. The 'Validate' button is located in the top right corner of the interface.

Button Validate to prepare the journey for activation

The screenshot shows the 'Journey Validation' window for a journey named 'Bienvenida Journey DeportesPueblo S...'. The window is divided into three main sections:

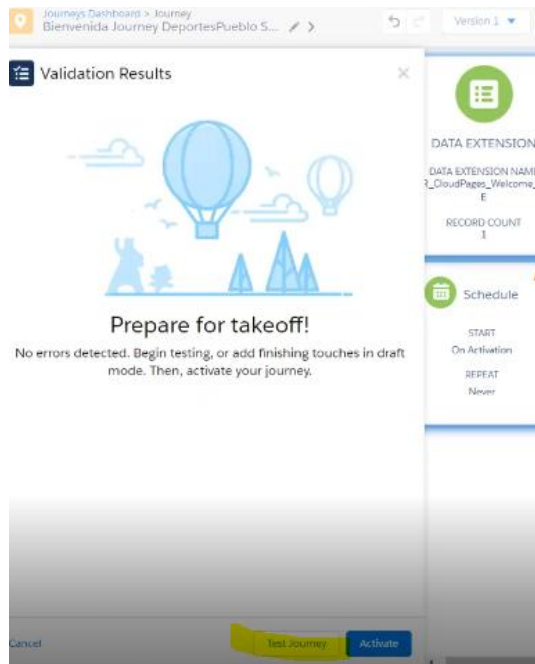
- Left Panel:** Features a hot air balloon illustration and the text 'Validating your journey... We're checking the entire journey for errors.' Below this is a 'Schedule' section with a calendar icon, showing 'START: On Activation' and 'REPEAT: Never'.
- Center Panel:** Displays a flow diagram of the journey. It starts with a 'DATA EXTENSION' (green circle icon) labeled 'DATA EXTENSION NAME: 3_CloudPages_Welcome_D E' and 'RECORD COUNT: 1'. This leads to an email step 'DeportesPueblo Welcome Email 1', followed by a '3 days' wait step (orange diamond with a clock), then a 'Decision Split' (orange diamond with a question mark). The split has two paths: one labeled 'Profile Not Complete' leading to 'DeportesPueblo Welcome Email 2', and another labeled 'Profile Complete' leading to a 'Join' step (orange diamond with an arrow).
- Right Panel:** A video call window showing a woman named 'Raquel' with the name 'Raquel' and 'Iliana Ambrera' visible at the bottom.

Validation Successful

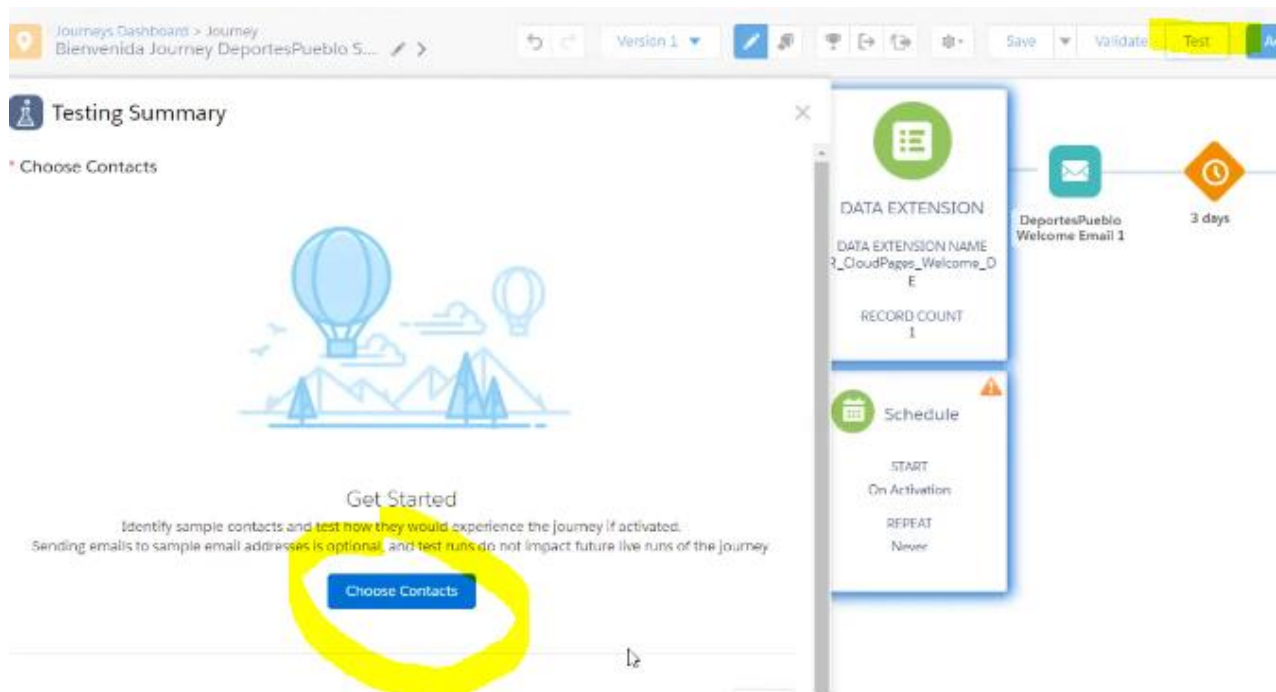
The screenshot shows the 'Validation Results' window for the same journey. The window is divided into three main sections:

- Left Panel:** Features a hot air balloon illustration and the text 'Prepare for takeoff! No errors detected. Begin testing, or add finishing touches in draft mode. Then, activate your journey.' Below this is a 'Schedule' section with a calendar icon, showing 'START: On Activation' and 'REPEAT: Never'.
- Center Panel:** Displays the same flow diagram as the validation window, but with a blue border around the 'DATA EXTENSION' and 'Schedule' sections, indicating they are the focus of the results.
- Right Panel:** The same flow diagram as the validation window, showing the journey steps and decision paths.

Next step, TEST JOURNEY button, to test the Journey



When I click on Test Journey either down below or above next to Validate, I can choose contacts to test the journey



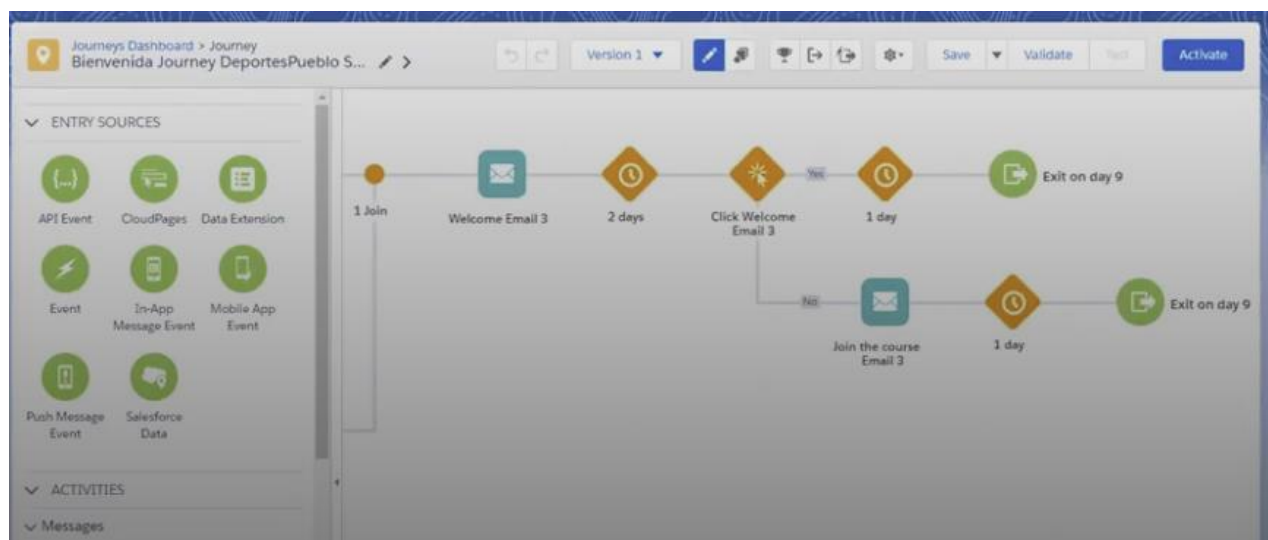
Once finished the Test it gives a summary with buttons either to ACTIVATE Journey or to Return to Draft for further adjustment

The screenshot shows the 'Journey Test Results' page in Salesforce Marketing Cloud. The breadcrumb trail at the top reads 'Journeys Dashboard > Journey > Bienvenida Journey DeportesPueblo S...'. The page title is 'Journey Test Results'. A message box says 'Click the arrows to view each contact's attribute values and expected path.' Below this, a link says 'Want to modify the test? Back to Test Summary'.

The main content area is divided into two sections. On the left, 'Contact Detail' shows a table with contact attributes and values:

ATTRIBUTE	VALUE
EmailAddress	pepe@deportespueblo.com
FirstName	Pepe
LastName	Lopez
Interest	hiking
OptInSource	website
optin	True

On the right, there are two summary cards. The top card, 'DATA EXTENSION', shows 'DATA EXTENSION NAME: R_CloudPages_Welcome_D E' and 'RECORD COUNT: 1'. The bottom card, 'Schedule', shows 'START: On Activation' and 'REPEAT: Never'. A 'Dep Week' label is next to the top card. At the bottom of the page, there are two buttons: 'Activate Journey' and 'Return to Draft'.



A screenshot of the Journeys created

The screenshot shows the Journeys Dashboard with a search bar and a "Create New Journey" button. Below the header, there is a table listing 9 journeys. The table has columns for "JOURNEY", "STATUS", "PERFORMANCE", and "LAST MODIFIED".

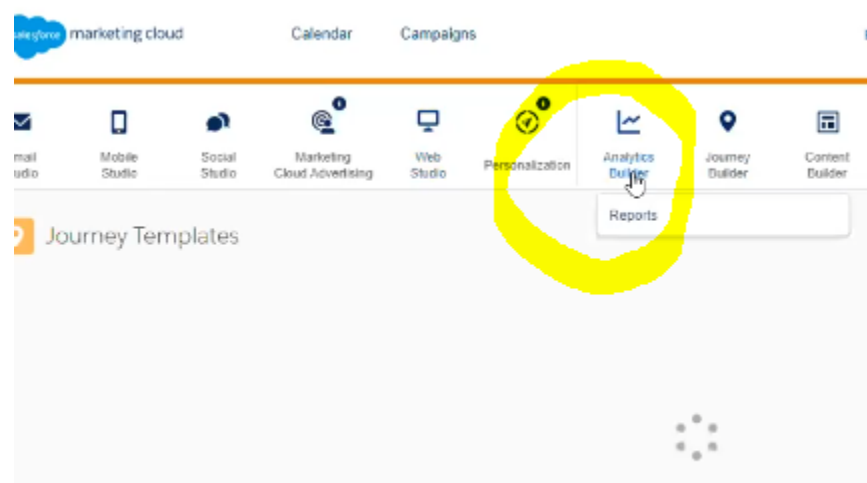
JOURNEY	STATUS	PERFORMANCE	LAST MODIFIED
Bienvenida Journey DeportesPueblo Split Version 1	Draft	--	03/10/2023 10:21 AM
Bienvenida Simple Journey DeportesPueblo Version 1	Draft	--	03/10/2023 10:21 AM
Bilyana Welcome Journey Draft - February 7 2023 at 2:54 PM Version 1	Running	6 Entries 5%	02/09/2023 11:20 AM

Analytics and Reports of the welcome campaign

Email Studio -Tracking Tab

Or

Analytics Builder – Reports



The possible Report available are:

1. Account Send Summary
2. Campaign Email Tracking
3. Journey Builder Email Send Summary
4. Cloudpages Imoressions by page



The Report Account Send Summary can create a pdf and schedule a periodic report with the desired frequency.

Account Send Summary

Summary

REPORT SOURCE ⓘ
Account Send Summary

CREATED
02/17/2023 5:21 AM

LAST MODIFIED
02/17/2023 5:21 AM

Parameters ⓘ

Date Range: Last 30 Days

Exclude Jobs Where Tracking Is Suppressed: True

Exclude Single Sends: False

Culture Code: English (United States)

Time Zone: (GMT-06:00) Central Time (US & Canada) ^

Schedule Options

Not Scheduled

[Edit](#)

Report Snapshots ⓘ

From: To: View

Date	Status	Action
02/17/2023 5:24 AM	Available	

To create another snapshot, Run

[Reports](#)
[Overview](#)
[Catalog](#)
[Activity](#)

Overview

Only Administrators can see the API Permission Adjustment report. [Learn more](#)

Report Shortcuts ⓘ

Single Email Performance by Device

Account Send Summary

Contacts Counts

Journey Builder Email Send Summary

[Select Shortcuts](#)

Report Catalog ⓘ

Report Categories

- Email (35)
- MobileConnect ()
- MobilePush (4)
- MC Administration

Reset Save Filters

Select A Saved Filter Set

- Owner
- Business Value

Reports

Search by Report Name

<input type="checkbox"/>	Report Name	Report Source	Owner	Channel
<input type="checkbox"/>	Blyana Campaign Email Tracking Report	Campaign Email Tracking Report	Outfitters Account 414	Email, Campaigns

The Account Send Summary report pdf shows the following metrics

Client Name:	Client ID	Sends	Implicit Deliveries	Implicit Delivery Rate		
Implicit Deliveries	Implicit Delivery Rate	Overall Bounces	Overall Bounce Rate	Hard Bounces	Hard Bounce Rate	
Implicit Delivery Rate	Overall Bounces	Overall Bounce Rate	Hard Bounces	Hard Bounce Rate	Soft Bounces	Soft Bounce Rate
Block Bounces	Block Bounce Rate	Technical Bounces	Unique Conversions	Cumulative Conversions	Conversion Rate	Unsubscribes
Open Rate	Unique Clicks	Cumulative Clicks	Click Rate	Unique Survey Responses	Cumulative Survey Responses	Survey Response Rate
Unique Complaints	Cumulative Complaints	Complaint Rate	Unique Unsubscribes	Cumulative Unsubscribes	Unsubscribe Rate	

This kind of Report can be scheduled to be received to an email periodically. The settings are under Schedule options, where you can set the type of format of the report(pdf, csv, xls, zip file)

An Email address to receive the Report, or save Report to FTP options are possible.

Reports Overview Catalog Activity Feedback Northern Trail

Back to Overview

Account Send Summary

Summary
REPORT SOURCE: Account Send Summary
CREATED: 02/17/2023 5:21 AM
LAST MODIFIED: 02/17/2023 5:21 AM

Parameters

Date Range	Last 30 Days
Exclude Jobs Where Tracking is Suppressed	True
Exclude Single Sends	False
Country Code	English (United States)
Time Zone	GMT-05:00: Central Time

Schedule Options
Not Scheduled

Edit Schedule Options

Schedule Options

Start: 03/10/2023 at 1:00 PM

Time Zone: March 2023

Repeat: 11 days

Delivery Options

Format *

- ☒ Data File (.csv)
- ☐ Data File UTF-8 (.csv)
- ☐ Data File Shift_JIS (.csv)
- ☐ Compressed CSV (.zip)
- ☐ Excel Spreadsheet (.xls)
- ☐ Excel spreadsheet (.xlsx)
- ☐ Adobe (.pdf)

Location

☒ Email Report Results

Email Address *

(If entering multiple email addresses, they must be separated by a period on /)

Subject *

Note to include in Email

☐ Save report for FTP

☐ Save to reports

Cancel Save

Account Send Summary

Summary

REPORT SOURCE: Account Send Summary

CREATED: 02/17/2023 5:21 AM

LAST MODIFIED: 02/17/2023 5:21 AM

Parameters

Data Range: Last 30 Days

Exclude Jobs Where Tracking Is Suppressed: True

Exclude Single Sends: False

Culture Code: English (United States)

Time Zone: (GMT-06:00) Central Time

Schedule Options

Not Scheduled

Schedule Options

Start: 03/17/2023 at 1:00 PM

Time Zone: (GMT-06:00) Central Time (US & Canada) *

* Denotes this time zone honors daylight savings time

Repeat: None (run once)

Delivery Options

Format *

☐ Data File (.csv)
☐ Data File UTF-8 (.csv)
☐ Data File Shift_JIS (.csv)
☐ Compressed CSV (.zip)
☐ Excel Spreadsheet (.xls)
☐ Excel spreadsheet (.xlsx)
☒ Adobe (.pdf)

Location

☐ Email Report Results
☒ Save report for FTP

Report Name *

Unique Option *

FTP Location *

☐ Save to reports

☒ Make it Unique
 ExactTarget Enhanced FTP

Cancel Save

Email Tracking Report

Results: Bilyana Campaign Email Tracking Report

Report Parameters

Select Campaign to Report Against: Welcome Series

Date Range: Last 30 Days

Exclude Jobs Where Tracking Is Suppressed: True

Culture Code: English (United States)

Time Zone: (GMT-06:00) Central Time (US & Canada)

Campaign Email Tracking Report

Run Date: 3/10/2023 5:14:58 AM

Member ID: [REDACTED]

Member Name: [REDACTED]

Date Range Start: 2/8/2023 12:14:54 PM

Date Range End: 3/10/2023 12:14:54 PM

Campaign Selected: Welcome Series

Email Name	Send Date	Send Count	% of Send	Opens	Open Rate	Clicks	Click Rate
Welcome Email 1	2/9/2023 4:21:51 AM	2	40.00%	1	100.00%	1	100.00%
Welcome Series Email 2	2/12/2023 4:21:16 AM	1	20.00%	0	0.00%	0	0.00%
Email 3	2/15/2023 4:21:24 AM	1	20.00%	0	0.00%	0	0.00%
Email 3	2/17/2023 4:21:41 AM	1	20.00%	0	0.00%	0	0.00%
Totals:		5	100.00%	1	100.00%	1	100.00%