



Marketing Cloud Email Specialist Bootcamp Day-6



Trailblazer COMMUNITY GROUPS



Thank You!



Let's succeed together!



Salesforce Marketing Cloud Email Specialist Certification Bootcamp Day-6

Journey Builder Concepts

Jyothsna Bitra



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- Marketing Champion
- 17x Salesforce Certified Application Architect
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- Founder of impactforce & MCLearningCamp
- Jbitra.com
- Mentor, Conference Speaker



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Agenda



- What is Journey Builder
- Types of Journeys
- Journey Templates
- Journey Builder Configuration
- Journey Validation
- Journey Data vs Contact Data
- Demo





› Email Marketing Best Practices: 10%

› Content Creation and Delivery: 24%

↳ Marketing Automation: 26%

- Given a customer scenario, recommend the appropriate marketing automation solution.
- Given a customer scenario, build the appropriate Automation Studio solution.
- Given a customer scenario, build the appropriate Journey Builder solution.

› Subscriber and Data Management: 26%

› Insights and Analytics: 14%



What is a Customer Journey



Customer journey is defined as all interactions that customers have with a company's brands, products, or services across all touchpoints and channels.

Touchpoints: actions the customer takes

Channels: Email, SMS, push notifications, Ads, Landing Pages, etc., .



Key Terms



Contact Data: First Name, Last Name, Region, Gender, Member Status

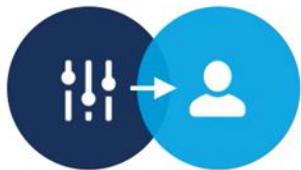
Behavioral Data: Product Interests, etc.,

Engagement Data: Opens, clicks, etc.,



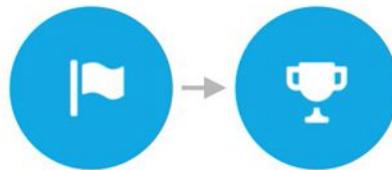
Journey Builder

Product strengths and benefits



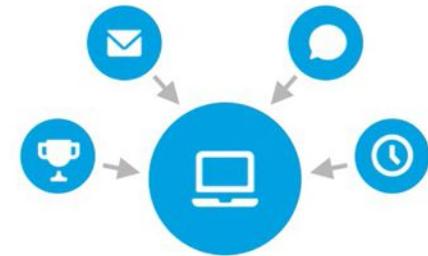
1-to-1 Messaging at Scale

Segment campaigns based on a contact's attributes, behavior, and engagement using easy-to-build decision logic



Goal-driven Marketing and Optimization

Set behavior-based goals for marketing campaigns, and continually optimize journeys based on progress



Visual, Drag-and-Drop Campaign Creation

Use a marketer friendly interface for building multi-path / multi-channel messaging flows



Journey Builder Use Cases



Awareness & Acquisition

Informational

Welcome New Subscribers

First Purchase

Refer a Friend

Onboarding & Engagement

Encourage a Sign Up

Influence Next Purchase

Download the Mobile App

Encourage Survey Completes

Profile Completion

Retention & Advocacy

Product/Service Review

Abandoned Cart

Re-Engagement

Win-back

Birthday/Anniversary



Types of Journeys



What do you want to build?

Multi-Step Journey



Build a journey that sends messages across any channel based on marketing logic and audience behavior.



Single Send Journey



Quickly build and send a single personalized message in any available channel.



Transactional Send Journey



Instantly send messages once an event occurs. Trigger personalized transactional messages with an API event.



Multi-channel, 1:1 curated content via a series of interactions

Great for new users and replaces Email Studio single sends

Transactional API messages that can be sent by non-technical users



Journey Templates



Journey Templates

9 Templates • Sorted by Alphabetical

Engagement ADVANCED

Abandoned Cart - Everyday Purchase

Convert customers who leave the buying process without a purchase by reminding them of the items in their cart.

Email Existing Customers ...

Engagement ADVANCED

Abandoned Cart - Significant Purchase

Support customers who leave large-ticket items in their cart or who abandon a funnel by helping them make an informed choice.

Email Existing Customers ...

Engagement SIMPLE

Anniversary Send

Influence customers at a meaningful moment, encouraging repeat business or renewed customer engagement.

Anniversary Email ...

Engagement

Retention



Journey Dashboard

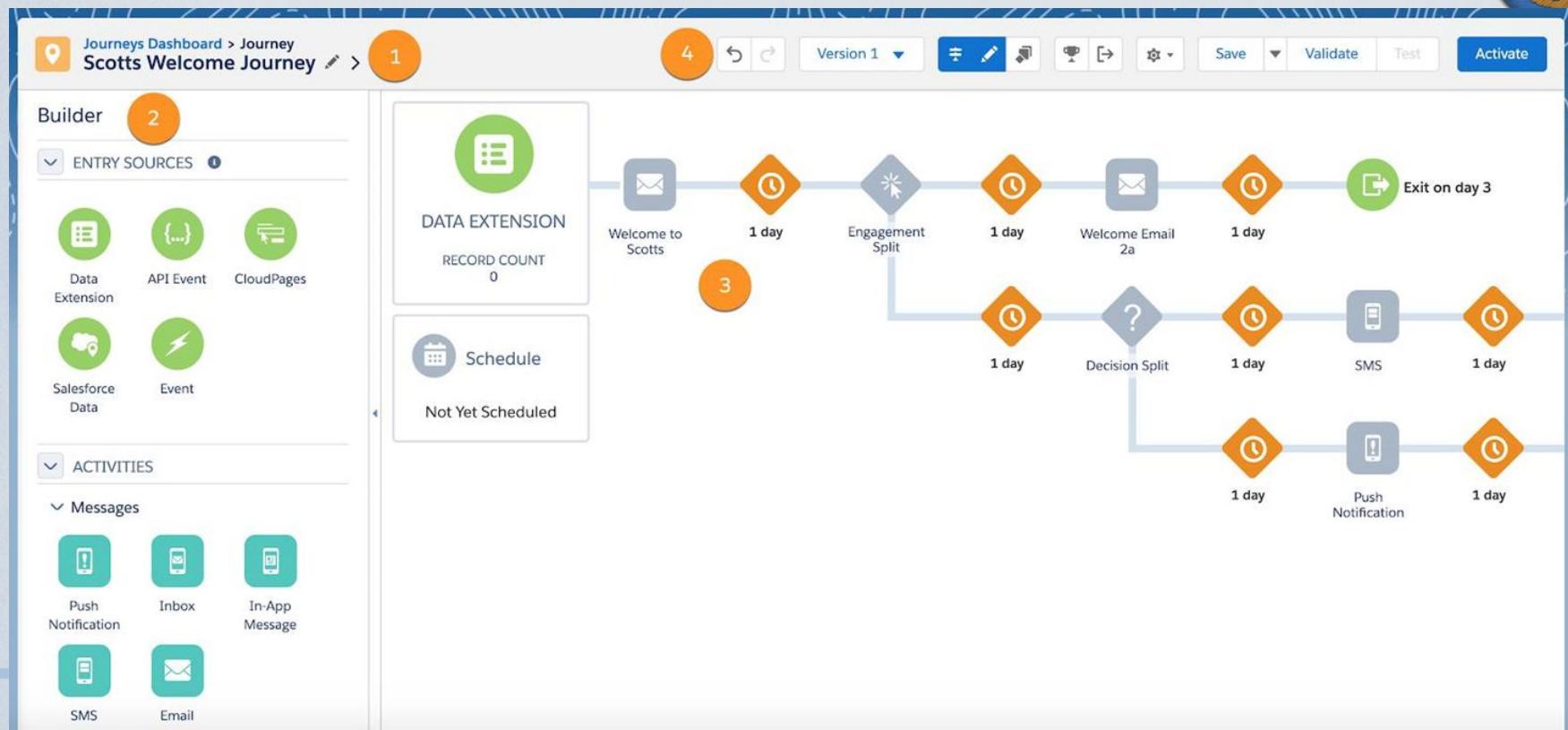
The screenshot shows the Journey Builder interface with various UI elements and numbered callouts:

- Top Navigation:** Journey Builder, Journeys (highlighted), Events, History, Templates, Feedback (45 notifications), and a user profile for Jyothsna Brita.
- Welcome Message:** Welcome to Journey Builder! Drag your mouse over the tips to learn how Journey Builder works.
- Left Sidebar:** Journeys Dashboard, 27 Journeys, Journeys (1), All Journeys, Scheduled Single Sends, Recent Single Sends, Transactional, Folders.
- Search and Create:** Search Journeys (3) and Create New Journey (4).
- Table View:** A list of journeys with columns for Name (2), Status, Performance (8), and Last Modified.
- Callouts:** Numbered 1 through 8 highlight specific features: 1 (All Journeys button), 2 (Journey list header), 3 (Search bar), 4 (Create New Journey button), 5 (Feedback icon), 6 (Events icon), 7 (History icon), and 8 (Performance metrics).

JOURNEY ↑	STATUS	PERFORMANCE	LAST MODIFIED
Diabetes Appointment Due Version 23 Patients due for an Appointment due to their Diabetes and not having an appointment in the last three months. Active	Stopped	Entries 64%	07/19/2021 1:15 PM
Diabetes Journey Version 4 Patients in this journey are currently due for a quarterly diabetic check up appointment.	Running	22,431 Entries 20%	07/19/2021 2:33 PM
Endocrinology Consult Version 4 Patients who meet the criteria for Endo	Stopped	41,194 Entries 3%	03/19/2020 5:42 PM
Flu Vaccine Due SMS Version 1	Draft	--	12/17/2020 3:46 PM
Hypertension Appointment Due Version 10 Patients due for an Appointment based on the Hypertension Clinical Visit Due Indicator Active	Stopped	821 Entries 49%	03/15/2018 11:02 AM
Mammogram Due Version 6	Stopped	1,998 Entries 8%	03/17/2021 12:43 PM
Mammogram Due Version 34 Patients due for a Mammogram based on the Mammogram Clinical Visit Due Indicator	Stopped	24,593 Entries 16%	01/25/2019 3:08 PM
Mammogram Journey Version 4 All qualified current patients that are due for a Mammogram.	Running	475,543 Entries 36%	07/19/2021 2:42 PM



Journey Canvas



Demo

Templates
Dashboard
Canvas



Question:

Alicia wants to create a journey to send a confirmation emails triggered based on an



Entry Sources

Batch Entry Sources

Data Extension: Select customers in a DE

Google Analytics 360: Admit audience from your GA 360 account

Audience Studio: Admit audience from Audience Studio

Audience: Select customers in a MobileConnect List to add to a journey in bulk

Triggered Entry Sources

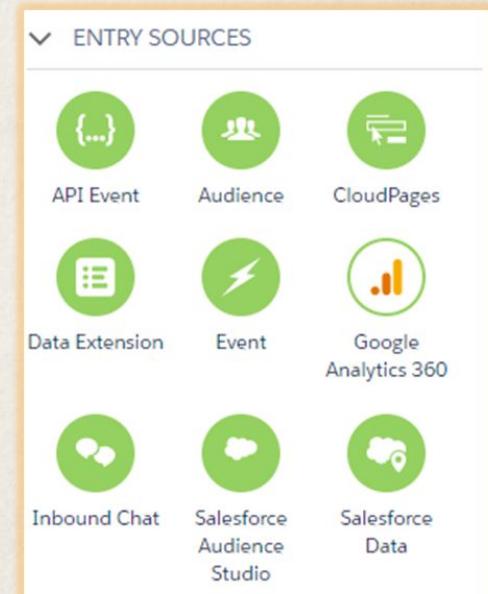
API Event: Instantly add customers to a journey through API when they take a specified action

CloudPages: Add customers to a journey from a CloudPages Smart Capture form

Inbound Chat: Admit contacts who send specific keywords

Salesforce Data: Select Salesforce object data or a Salesforce campaign to add customers to a journey

Event: Add customers to a journey based on a key contact date or date relative to it



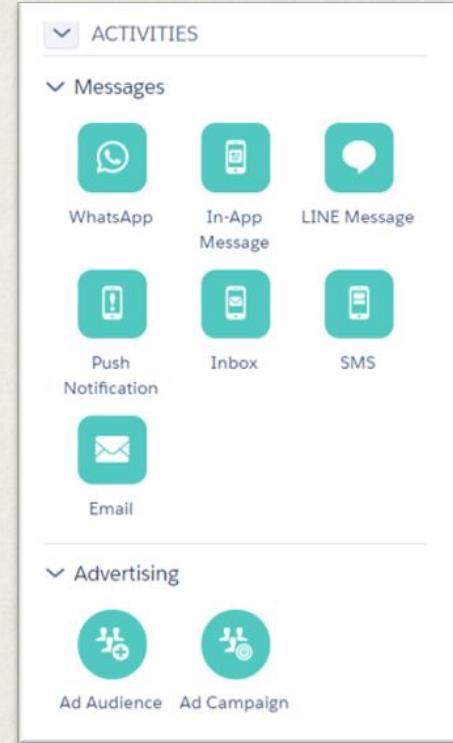
Activities

Messaging and Advertising Activities

Email: Send an email to the journey records

Mobile: Admit audience from Audience Studio

Advertising: Select customers in a MobileConnect List to add to a journey in bulk



Activities

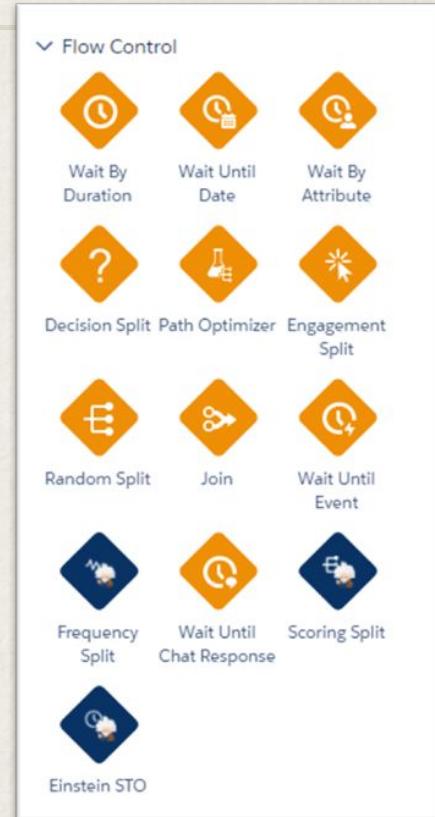
Flow Control

Wait Activities: by duration, until date, by attribute, until event, until chat response

Split Activities: Decision Split, Engagement Split, Random Split, Frequency Split, Scoring Split, Einstein STO

Join: reconnect 2 or more paths

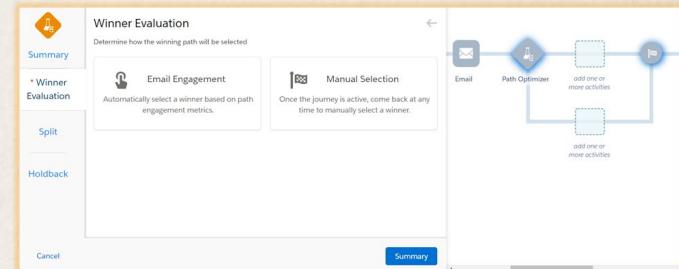
Path Optimizer: advanced A/B testing for 2-10 paths



Path Optimizer

Multi-variant testing tool that allows to run tests to optimize journeys

- Automatic or manual winner testing with up to 10 paths across content, frequency of sends, multi-channel
- Winning path continues to receive new contacts while losing path stops taking in new contacts
- Test summary analytics provide historical test context for decision making



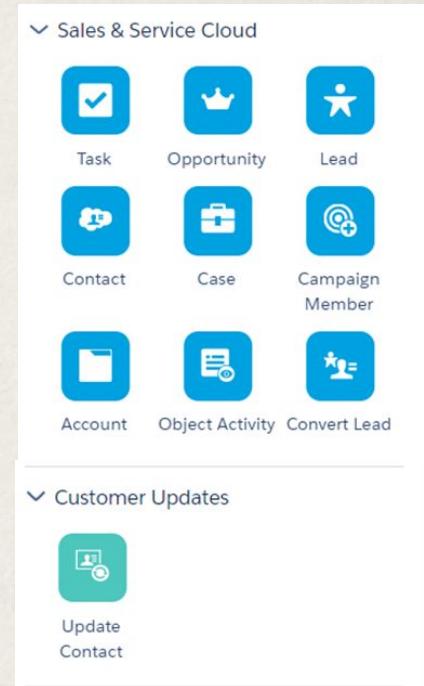
Sales and Service Cloud Activities

Sales and Service Cloud Activities:

- Available when MC Connect is configured
- Access to native sales and service cloud activities within journey Builder
- Create lead, account, contact, case, task, update and add campaign members and work with any custom object from within the journey

Customer Updates:

- Set a value in the DE when the contact reaches this step



Demo

Entry Sources
Flow Control Activities
Messaging Activities
Sample Journey
Journey Validation



Journey Status

- Canceled
- Deleted
- Draft
- Running
- Scheduled
- Sent
- Stopped

Status	Editable	Active	Allowing Entry	Can have Audience
Draft	✓	✗	✗	✗
Running	Only for email changes	✓	✓	✓
Finishing	Only for email changes	✓	✗	✓
Stopped	✗	✗	✗	✗

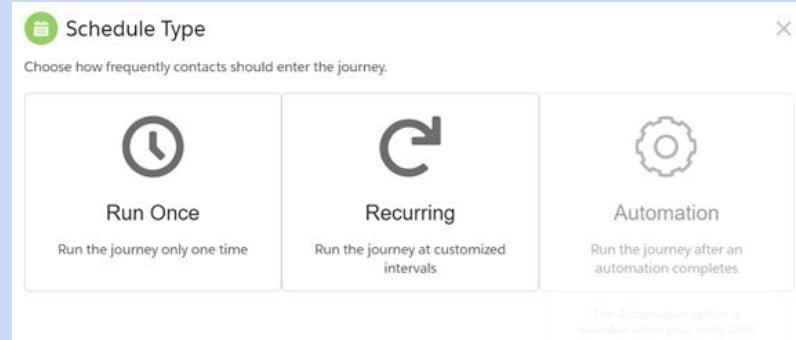


Journey Version and Schedule

Journey Versions



Journey Schedule



Question:

Alicia wants to update the email content in a running journey. Which steps does she need to follow

- A. Pause the journey, edit the email and resume the journey
- B. Edit the email within the journey builder relevant send email activity
- C. Locate the email in the Content Builder and update it
- D. Stop the journey, edit the email and resume the journey



Question:

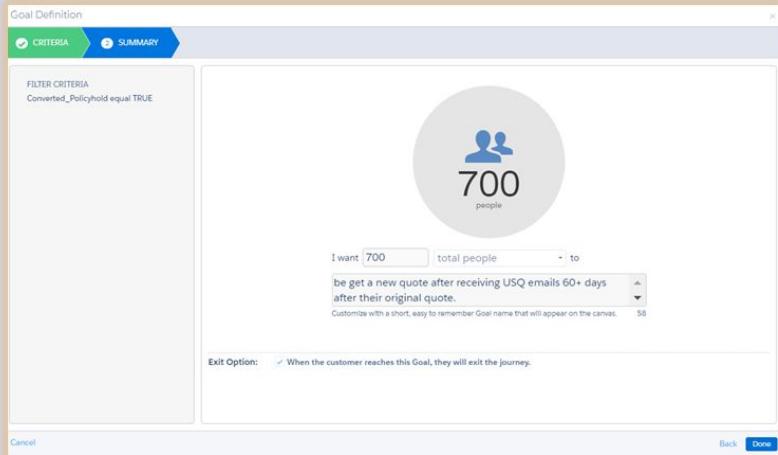
Alicia wants to update the email content in a running journey. Which steps does she need to follow

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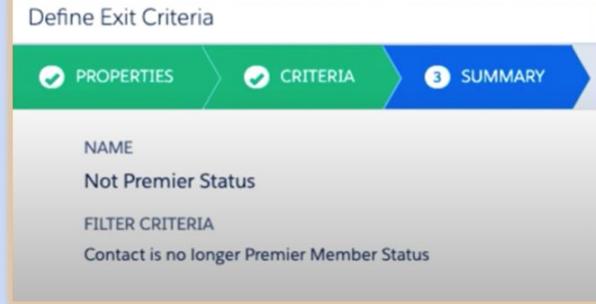


Goal and Exit Criteria

Goal



Exit Criteria



Journey Data vs Contact Data



Journey Data	Contact Data
Static Data	Dynamic Data
Source data injected into the journey	Data as it exists in Contact Builder at the time of decision
Configure underlying data in DE entry source	Configure underlying data in Contact Builder
Ideal for routing transactions	Ideal for routing people



Journey Settings



Contact Entry:

- No reentry
- Reentry anytime
- Reentry only after exiting

Default Email Address and Mobile Number:

- Use the email address or mobile number from Entry Source
- Use the email address or mobile number from Contact Builder

Contact Entry i

Select contact re-entry mode.

- No re-entry
 Re-entry anytime
 Re-entry only after exiting

Default Email Address i

- Use email attribute from Entry Source
 Use email attribute from Contacts [Add...](#)

Default Mobile Number i

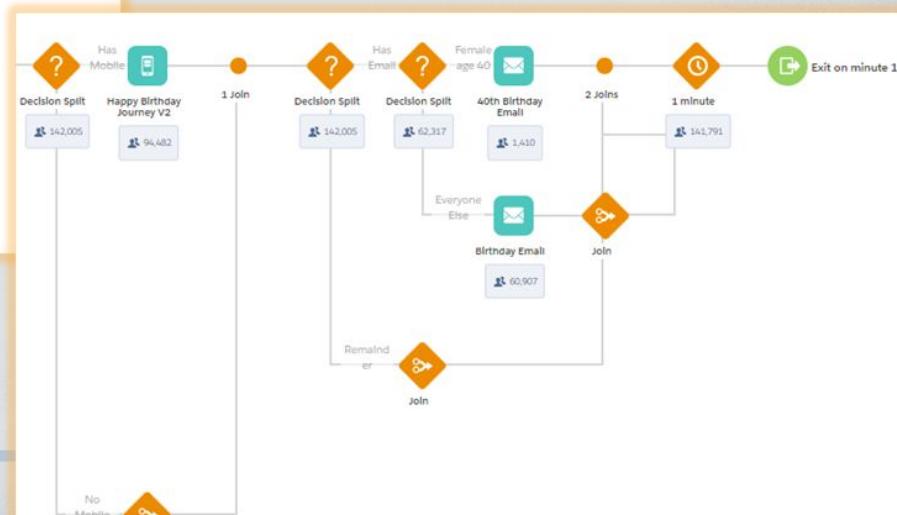
- Use phone number attribute from Entry Source
 Use mobile number attribute from Contacts



Journey Example



Customer Journey Example: Check Up Reminder



Demo

Sample Journey
Journey Validation



Question:

Which activity can be used to track the progress of a customer in the current journey and suppress them from entering another journey

- A. Contact Activity
- B. Customer Updates Activity
- C. Decision Split Activity
- D. Suppress Contact Activity



Question:

Which activity can be used to track the progress of a customer in the current journey and suppress them from entering another journey

- A. Contact Activity
- B. **Customer Updates Activity**
- C. Decision Split Activity
- D. Suppress Contact Activity



Recap

- What is Journey Builder
- Journey Builder Use Cases
- Types of Journeys
- Journey Templates
- Journey Builder Dashboard
- Journey Builder Canvas
- Journey Builder Configuration



Additional Resources

[Journey Builder Campaigns](#)

[Journey Builder Basics](#)



Module

Journey Builder Campaigns

Plan, build, and launch a welcome campaign in Journey Builder.

Plan Your Journey Campaign ~10 mins
Prepare the Entry Source ~10 mins
Build a Journey Campaign ~10 mins
Test and Launch a Journey Campaign ~10 mins



Module

Journey Builder Basics

Get started with the Journey Builder app.

Configure Journey Builder Access ~10 mins
Get Started with Journey Builder ~10 mins
Send a Single Message with Journey Builder ~10 mins



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Thank You!



Drag the description on the left to the correct activity on the right.

- Customize the path a customer takes based on interactions with messages or other actions. Wait Activity
- Pause your customer between activities for a period of time set by you. Split Activity
- Return contacts to the original path after they've gone through a split activity. Join Activity
- Pause your customer between activities to measure if they have met a goal. Wait Until Activity
- Send any form of content to your contacts. Message Activity



Drag the description on the left to the correct activity on the right.

- Pause your customer between activities to measure if they have met a goal. Wait Activity
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- Send any form of content to your contacts. Message Activity

emplate should be used when a customer is browsing a product and buying anything?

andoned Cart or Browse

Duled Send

ll Campaign

ome Campaign

