Journey Builder
Success Guide

Your step-by-step guide to creating
1:1 customer journeys

salesforce | marketing cloud

Welcome to the Journey Builder Success Guide!

Today's consumer is always on—and always interacting—across channels and devices. For marketers, it's never been more important to engage your audience throughout the entire marketing, sales, and service lifecycle.

With Journey Builder, you can leverage customer events and behaviors to create 1:1 conversations at scale. Plan the journey. Personalize the experience. Optimize the results. Orchestrate every step of the journey to deliver the right message, at the right time, and on the right channel.

Here's What You'll Find:

- Introduction to the Key Features of Journey Builder
- When to Use Journey Builder
- Configuring Customer Data Models
- Building Interactions
- Testing and Optimizing Results
- Glossary of Terms

Meet Journey Builder

Journey Builder is your solution for engaging customers throughout the marketing, sales, and service lifecycle. As the industry's most sophisticated journey management platform, it helps you plan, personalize, and optimize 1:1 customer journeys across all channels—both online and offline.

Now you have the power to illustrate complex customer journeys, listen for customer activity throughout the lifecycle, and then automatically respond with and measure the effectiveness of highly customized communications based on each customer's history, preferences, location, and actions. Plus, you can measure the effectiveness of your campaigns in real time.

Whether you need to reach your customers via email, mobile, social, connected devices, apps (or just about any other channel you can think of), Journey Builder brings the power of personalization to a whole new scale.

Watch a demo of Journey Builder here.

Key Features of Journey Builder

Plan: Journey Maps

Journey Maps help marketers model the interactions of their customers' journeys with their brand, product, or service. Using Journey Maps, a marketer can apply and execute campaigns at any point in a customer's journey.

Advantages:

Trigger timely, meaningful messages across online and offline channels based on real-time behavior.
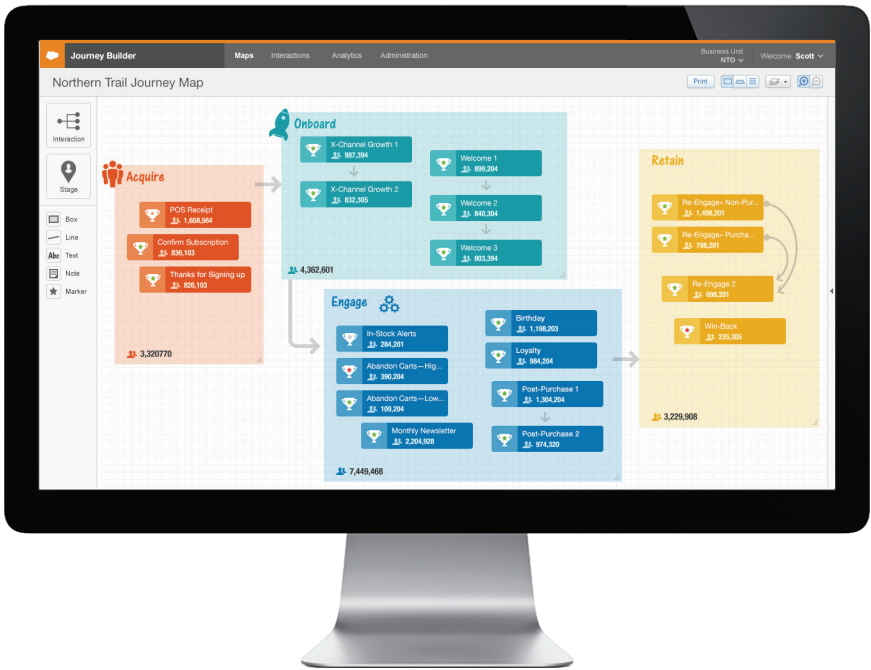
Personalize: Interactions

Interactions are outbound communications sent to customers based on their contact profile, activities, preferences, location, or anticipated actions. Each interaction is triggered by a set of conditions—defined by you—that can occur within or outside of the Salesforce Marketing Cloud environment.

Advantages:
*Treat customers like*
unique individuals—
not "one size fits
all" segments.
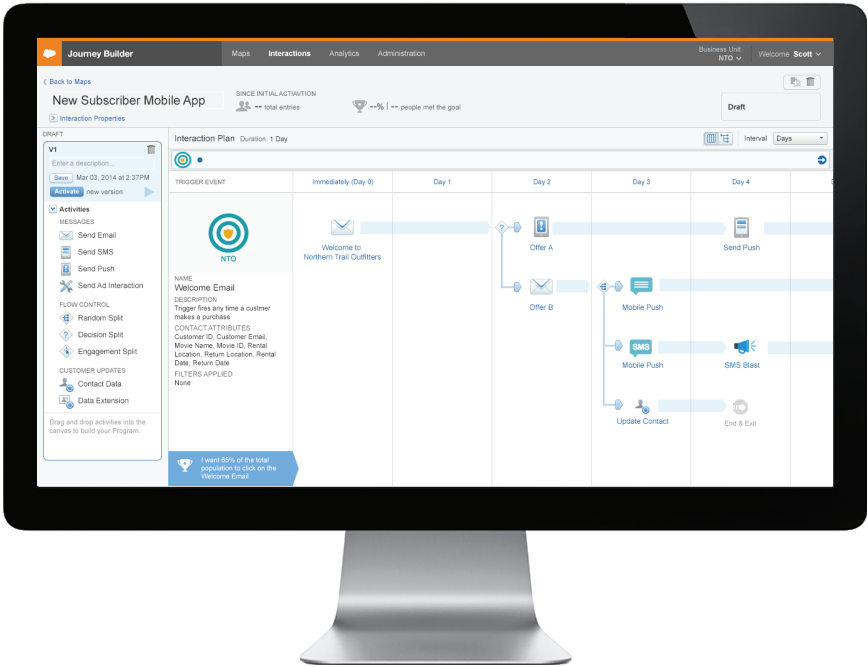
Optimize: Metrics

Advantages:
Test engagement across
different channels and
measure against your
business goals.

Online analytic tools enable you to measure the effectiveness of interactions against custom goals. For example, you can easily track the number of customers in an interaction that have achieved a goal—such as purchase, download, visit, or trial conversion. You can even monitor goal attainment by message, channel, day, or path.
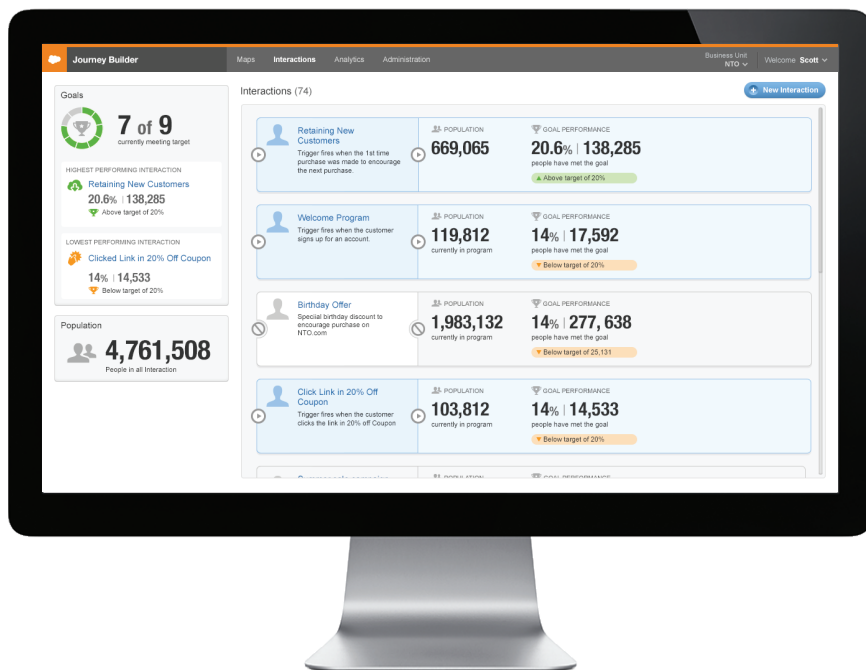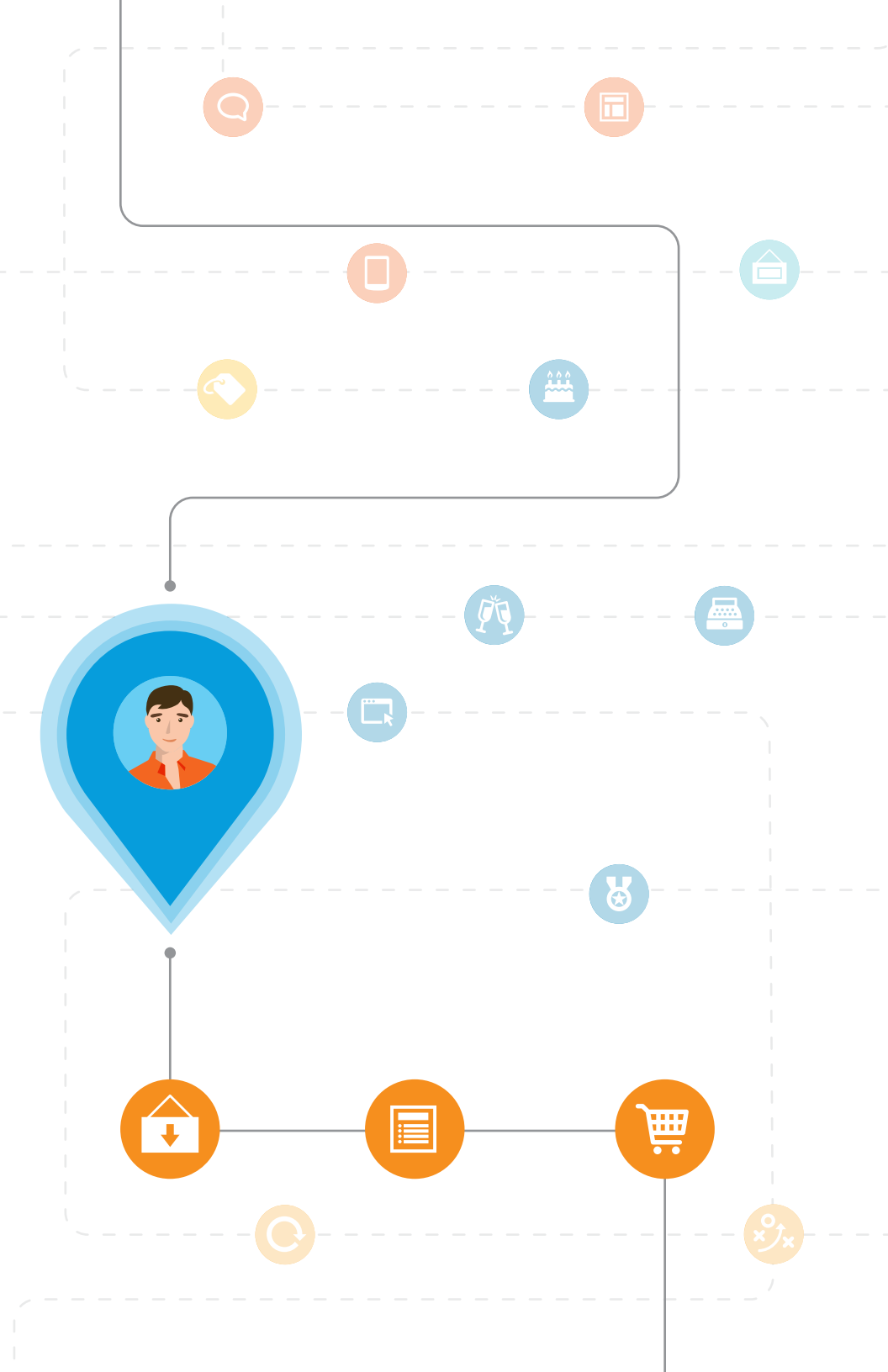
When to Use Journey Builder

Customers are in the drivers seat

63%
Consumers who point to experience as their most important factor in their choice of a brand
(Accenture)

86%
Consumers whose buying decisions are adversely influenced by reading a negative review
(Dimensional Research)

93%
Consumers whose buying decisions are positively influenced by reading a good review
(Dimensional Research)

It's long been at the top of marketers' wish list to provide a personalized experience for each and every customer from the moment they first visit your website, until the day they achieve platinum status in your loyalty program. Now that's possible with Journey Builder. You can plan, personalize, and optimize event-driven lifecycle marketing programs for each customer based on:

• Who they are, what they like, and what they most likely want (contact profile)

• Where they are in the customer lifecycle (potential prospect through customer advocate)

• Why they're interacting (opting to receive a newsletter or submitting a service request)

• How they respond—or don't respond—to each communication they receive

• Which channel they prefer for interaction (email, mobile, social, web, apps, connected products, etc.)

That kind of 1:1 customization transforms the brand-customer relationship! Customers will no longer receive generic, SPAM-like marketing communications with little value or relevance. Instead, they are engaged with valuable, personalized communications based on their specific wants and needs. In fact, studies have shown that this 1:1 approach has a measureable impact on Net Promoter Score (NPS). A high NPS score is correlated with increased engagement, improved campaign performance, and drives customer satisfaction and retention.

Common Journey Builder Use Cases

Industry-leading brands are using Journey Builder to power ongoing lifecycle campaigns like:

- Mobile Opt-In
- Social Opt-In
- Web Opt-In
- Welcome Series
- Abandoned Cart
- Birthday
- Browse Retargeting
- Customer Anniversary

- Loyalty
- Newsletter
- App Downloads
- Post-Purchase
- Promotional
- Re-Engagement
- Win-Back

Implementing Journey Builder

Quick Tip:

Of course your customer data is required to "go live," but you don't have to wait to start using Journey Builder. Begin mapping your customer journey and critical interactions using placeholders immediately.

It All Starts with Data

All successful marketing begins with good customer data—because data drives relevance, and relevance drives action.
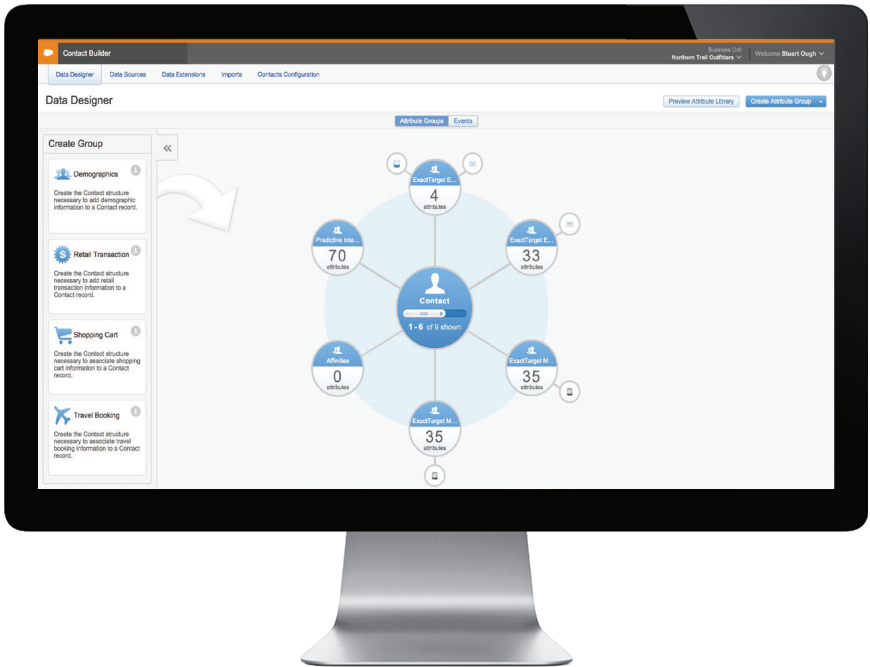
1. Configuring Your Customer Data Model

Journey Builder is built to leverage data from any system: CRM, web metrics, and POS. Contact Builder helps map out the data source and how they relate back to the customer. This is important for determining how customers get injected into interactions and how they will meet goals. Additionally this data can be used to filter customers into unique paths based on the attributes that matter most to your business (e.g. Lifetime Value, Segment, Product Interest, Cart Value, etc.)

2. Define Events

Use Contact Builder Events to define what behavioral data you want to monitor and use to qualify customers for Journey Builder Interactions. Events can include any data that can be mapped to a unique contact like Opt-in, Purchase, App Download, Trial Expiration in X Days, and more.

3. Get the Data Flowing

Data can come in through scheduled imports or streamed through open APIs to inject people into an Interaction and/or update whether or not they have met a goal.

Quick Tip:
Use the built-in data model templates in Contact Builder to speed setup. Pre-configured templates include Demographics, Retail Transactions, Shopping Cart and Travel Bookings.

Significant Business Impact

Journey-led transformations deliver impact across many key business metrics.

More revenue, happier customers, at a lower cost.

(McKinsey Research: Customer Journey Transformation)

Improve Customer Satisfaction
20%

Fuel Revenue Growth
10-15%

Lower Cost to Serve
15-20%

Engage Employees
20-30%

Building Interactions

Interactions are comparable to lifecycle marketing campaigns—like welcome, post-purchase, or win-back programs—but can also be any communication triggered by a customer activity—think "Called Customer Service" or "Returned a Purchase."

1. Select the Trigger

Triggers are marketer-defined conditions that prompt an interaction to run. Triggers instruct an interaction to start when the event they are listening for is detected.

2. Set Goal

To make the objective of the interaction clear, you must first define a goal. When defining a goal, decide what the desired outcome is and the conversion target you want to reach. Set goals based on customer data to test and find what content delivers the highest ROI.
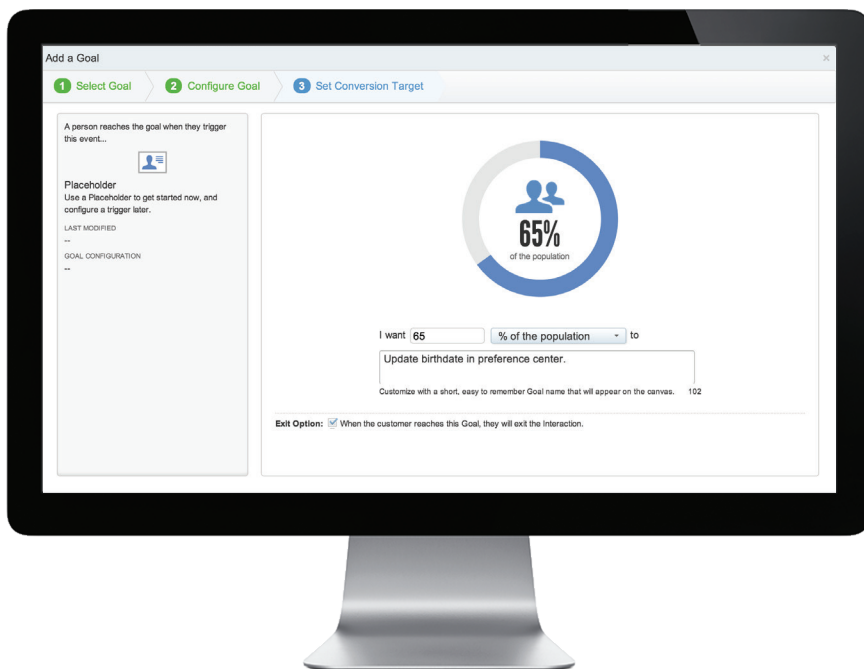
3. Drag, Drop, and Configure Activities

- Messages – Journey Builder can send messages via email, SMS, mobile push, or custom channel activities like direct mail or in-app messages.

- Splits – Splits are activities that divide the group of contacts in an interaction into separate cohorts so that each cohort may receive a different set of subsequent activities.

  A decision split is based on a change in data associated with a contact. By placing a decision split after the trigger or any activity in an interaction, the marketer prompts Journey Builder to evaluate the data tied to each contact and sort them by their characteristics.

  Random splits are activities that randomly divide a group of contacts in an Interaction into groups.

  Engagement splits are based on a customer action or behavior. Marketers configure the customer action that Journey Builder evaluates, which is commonly based on the activity that immediately precedes the engagement split.

- Update Contact Data – Automate the update of customer data using the Update Contact Data Activity. For example, in a Welcome Series campaign, many marketers want to flag a control group to never receive any promotional emails to objectively measure the lift of their programs. In Journey Builder you can randomly select a subset of contacts (like 10%) who opt-In and use the Update Contact Activity to set the "Control Group" flag to "TRUE."

Quick Tip:
Best practice is to leverage the Random Split activity to A/B/n test up to ten variable messages, channels, waits, or frequency.

There are two ways customers become part of an Interaction in Journey Builder.

1. Sent automatically via the Application Programming Interface (API)

For example, if they abandoned their cart online, a message is automatically sent to the Marketing Cloud detailing they that abandoned a cart filled with the specific items and dollar amount.

2. Scheduled and Injected via Fire Event activity

For example, rather than abandoning their cart and automatically sending a message as a result, you could change settings so that every hour a check is done to see if anyone has abandoned a cart.
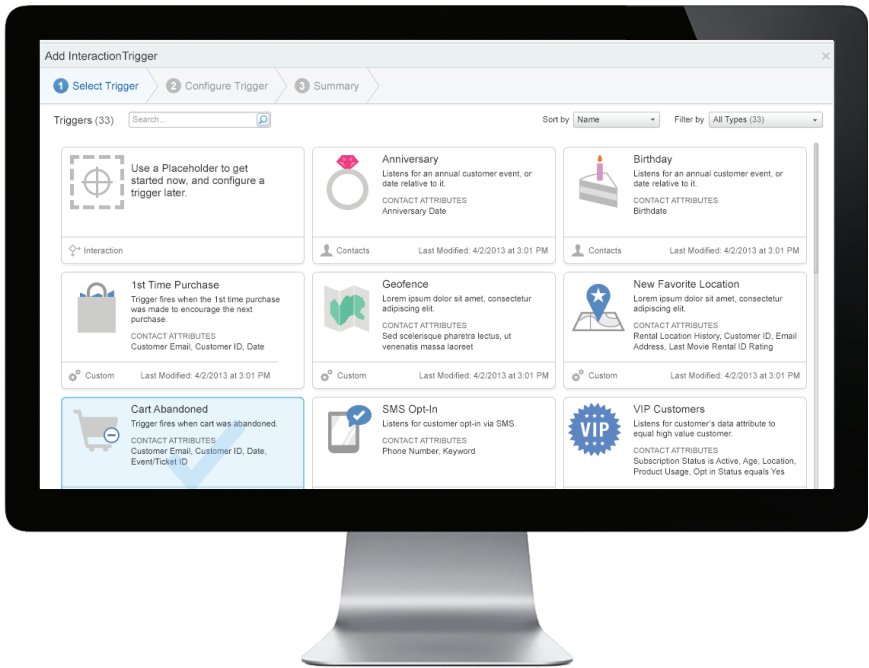
Test Before You Send

Now that you've built the interaction, you want to feel confident that customers will receive the right message based on their behavior or attributes—that's where testing comes in. You can send your interaction to a test group of five people with different data attribute values. Send a test interaction to simulate and confirm that the right people are going to get the right content. Now you are ready to send out your interactions!

Quick Tip:
When testing your interactions, create a version with the wait periods set to minutes. Once you've validated the logic of your program and content, activate the version with the actual wait periods.

Monitoring and Optimizing Performance

Now that your campaign is up and running, you can start measuring your custom defined goals. With Journey Builder, you can track how many people have gone through the interaction and how many have met the goal.

Plus you're able to follow the progress of your interaction in real time and make adjustments as needed. Journey Builder allows you to create a new version by copying a current interaction, making the changes that you want, saving and testing the new version, and finally activating it. All new customers flowing in will go through the new interaction while those who have already experienced the interaction will continue down the same path.

Join the Journey

Journey Builder leverages an ever-improving single view of customers based on real-time responses. It can increase customer satisfaction, improve loyalty, drive advocacy, and generate revenue. Journey Builder is always on—and always interacting—because in customer journey management, every moment matters.

Ready to get started? Contact your account executive to start personalized conversations with your customers today.

>50% *of* **Customer Interactions** happen during a multi-event, multi-channel *journey*

(McKinsey Research: Customer Journey Transformation)

Glossary

Activity

The message action, decision, and/or update that are dragged and dropped onto the Canvas. The series of Activities defined by the marketer comprise the Interaction. This can include sending emails, SMS messages, push notifications, or any other forms of content sent to customers who meet the criteria set within an Activity.

Canvas

An area of the user interface where you'll construct the workflow of an Interaction. Marketers drag and drop Activities (like an email send) onto the Canvas to define the channel, message, and timing of each Interaction.

Decision Split

A split Activity based on a change in data associated with a Contact. When a Decision Split Activity is placed on the Canvas, the Interaction evaluates data associated with a Contact to decide which branch of the split to send each Contact into. For example, a marketer whose goal is to separate the Contacts in an Interaction into two groups by age: Contacts who are older than 35 and Contacts who are younger than 35. By placing a Decision Split after the Trigger or any Activity in an Interaction, the marketer prompts Journey Builder to evaluate the data tied to each Contact and sort them by age, funneling Contacts who are older than 35 into one branch of the split and Contacts who are younger into the other branch.

Engagement Split

Activity based on a customer action or behavior. Marketers configure the customer action that Journey Builder evaluates, which is commonly based on the Activity that immediately precedes the Engagement Split. For example, a marketer whose goal is to divide Contacts who opened an email from Contacts who did not. The Activity preceding this Engagement Split is a Send Email Activity. The marketer then places an Engagement Split Activity after the Send Email Activity and configures the split to evaluate the Contacts in the Interaction to note the Contacts who opened the email. The Engagement Split then funnels Contacts who opened the email into one branch of the split and Contacts who did not open the email into the other branch.

Event

A customer-initiated action (like e-newsletter opt in) that causes an Interaction (like welcome email series send) to occur. Events are configured by an administrator as a prerequisite to creating an Interaction.

Interactions

Interactions are outbound communications sent to customers based on their contact profile or actions. Each Interaction is prompted to run by a triggered event.

Journey Maps

Journey Maps help marketers model and execute the Interactions of their customers' journeys with their brand, product or service. Using Journey Maps, a marketer can apply and execute campaigns at any point in a customer's journey.

Metrics

Metrics enable marketers to measure the effectiveness of interactions against goals. For example, they can easily track the percentage of customers in an Interaction that have achieved a target such as percentage of opens or clicks. Marketers can also monitor goal attainment by message, day, or channel.

Split

Split Activities are Activities that divide the group of Contacts in an Interaction into separate cohorts so that each cohort may receive a different set of subsequent Activities.

Random Split

A split Activity that divides the group of Contacts in the Interaction into groups randomly. The number of branches a group of Contacts can be divided into is configurable.

Notes
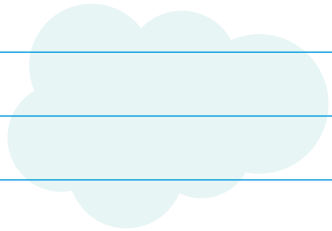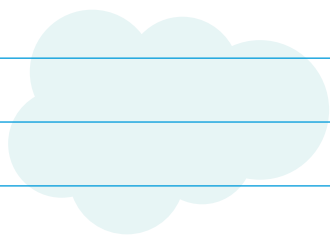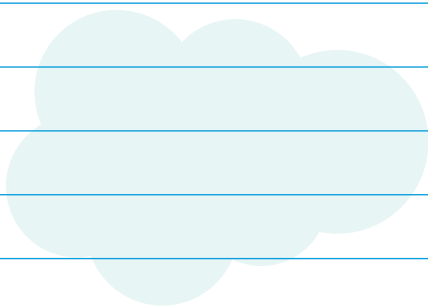
Learn more about Journey Builder

salesforce.com/marketingcloud/products/journey-management

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