

Getting Started: Journey Builder: Journey Strategy

Accelerator Webinar

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 This webinar will begin at 1:05 pm EDT

CUSTOMER
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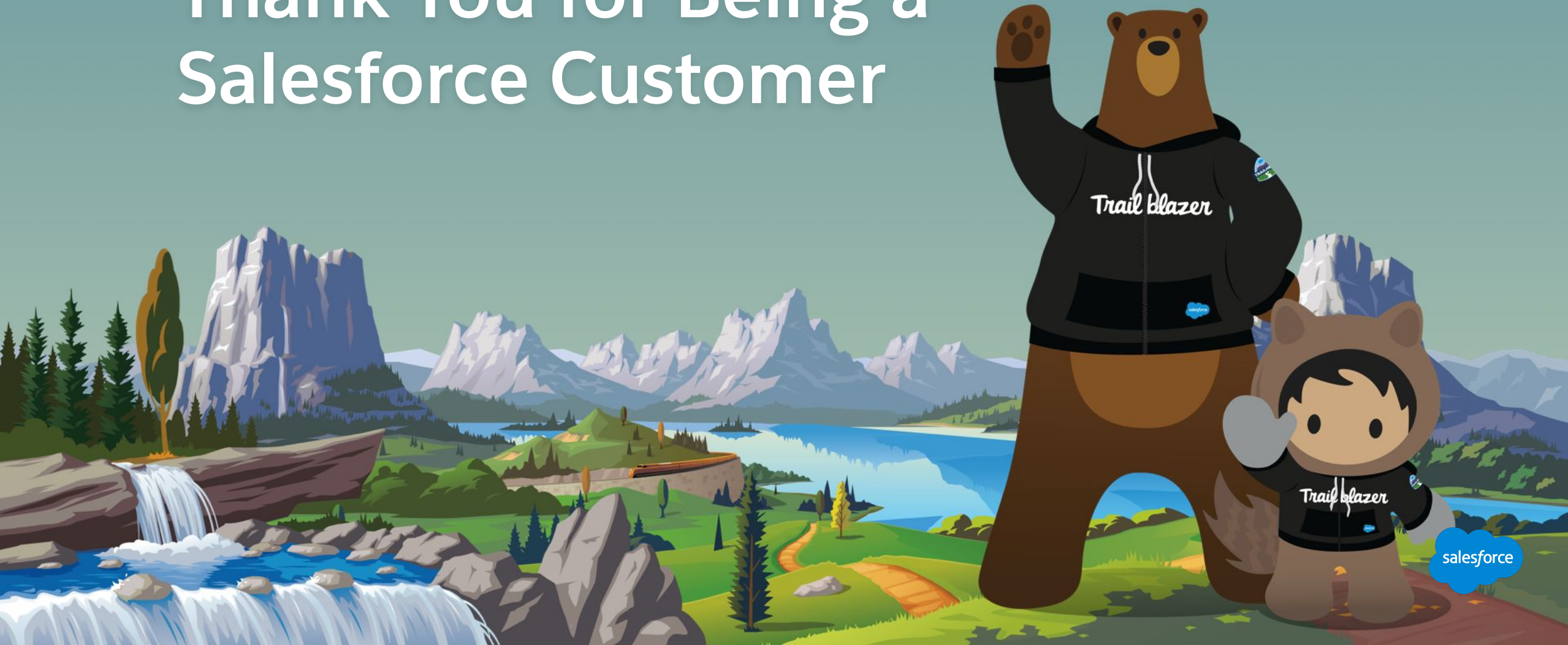
Premier Plan Customers
Don't forget to request
your 1:1 session
follow-up in the survey
after this call.

Welcome to this Accelerator Webinar!

In this two hour session, we'll discuss journey strategy basics and give you guidance to understand what is needed to start a customer journey, so you can get the most out of your Salesforce investment.



Thank You for Being a Salesforce Customer





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Agenda

Overview

What challenge are we solving for you?

Journey Builder Basics & Strategy Intro

Let's take a tour of the canvas, and define what a journey is to approach the journey mindset.

Set Your First Goal

Set a goal to map out a journey use case in this interactive session.

Define Your Audience

Define your audience to map out a journey use case in this interactive session.

Identify Data Needs

Identify your data needs to build out a journey use case in this interactive session.

Refine Your Goal

Refine your goal to build out a journey use case in this interactive session.

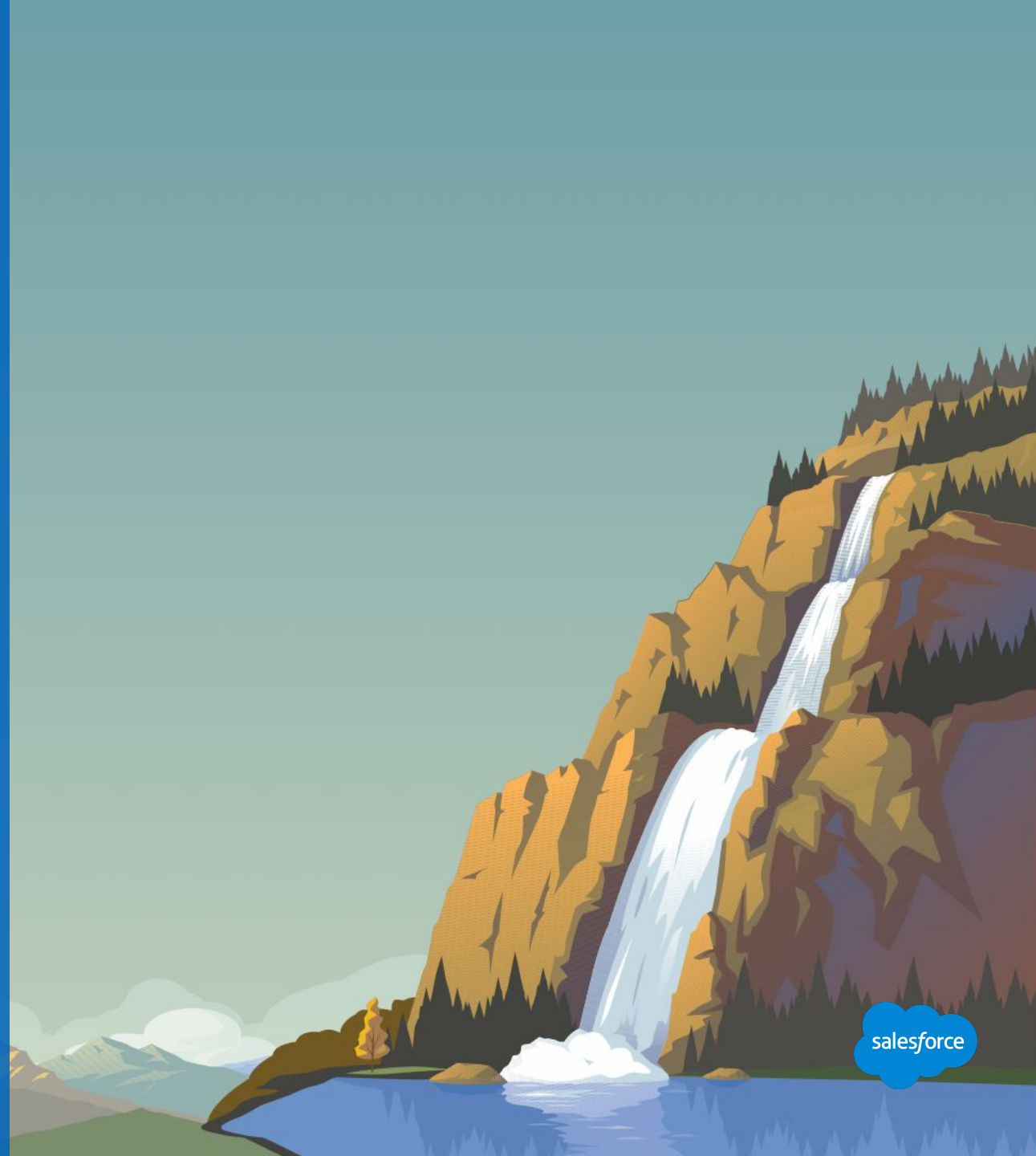
Craft Your Channels and Content

Identify the best channels and content to build out a journey use case in this interactive session.

Journey Mapping & Brief Product Demo

Map out possible interactions for your journey use case.

Achieving Your Business Outcomes with Accelerators





Overview

What challenge are we solving for you?

A Salesforce Specialist will help you:

- Gain a basic understanding of what is needed to start a customer journey.
- Learn how to develop a journey practice that can be used to create many journeys in the future, and across your customer life cycle.
- Develop a journey strategy to help you increase engagement, and retention.
- Draft a Map of a use case to understand the practice and the process.

Journey Builder Canvas Basics

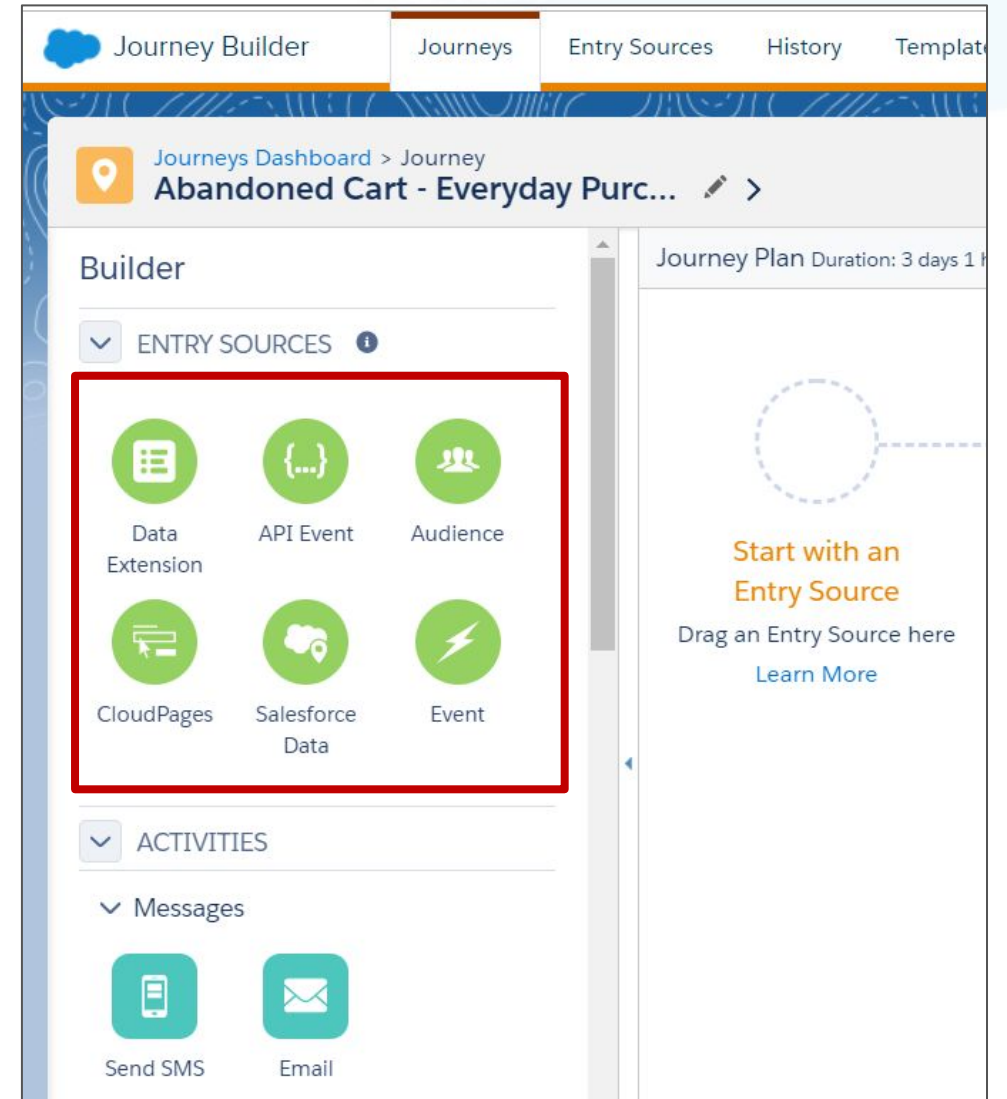


Canvas Overview (1)

Manage your entry sources

Entry Sources:

- **Data Extension:** Select customers in a data extension from Automation Studio, Email Studio to add to a journey in bulk.
- **API Event:** Instantly add customers to a journey through API when they take a specified action.
- **Audience:** Select customers in a data extension from Mobile Studio to add to a journey in bulk.
- **CloudPages:** Add customers to a journey from a CloudPages Smart Capture form.
- **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, such as a birthday or five days before a concert.

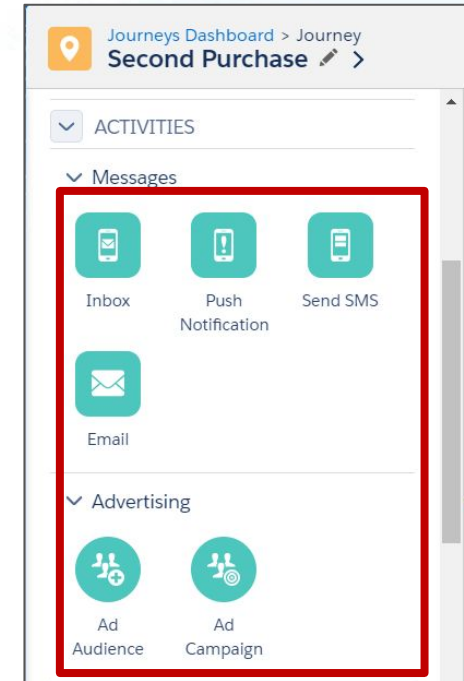


Canvas Overview (2)

Manage your activities

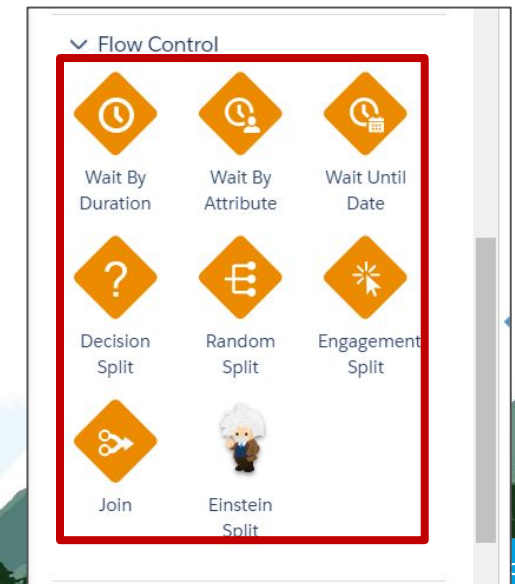
Activities > Messages and Advertising:

- Messages send an SMS, push, push inbox, or email message.
- Advertising adds contacts in a journey into your advertising audience in Facebook, Twitter, or Google AdWords. Ad Campaign creates Sponsored Posts on Facebook.



Activities > Flow Control:

- **Decision split:** Decide on a path based on your data.
- **Random split:** Create advanced A/B testing splits of two to 10 levels.
- **Engagement split:** Decide on a path that's based on opens or clicks.
- **Join:** Reconnect two or more paths.
- **Wait by Duration, Wait by Attribute, Wait Until Date:** Define the wait time for your messages in minutes, hours, days, weeks, or months. Also includes Wait Until a specified date or date-based attribute.



Canvas Overview (3)

Manage your activities

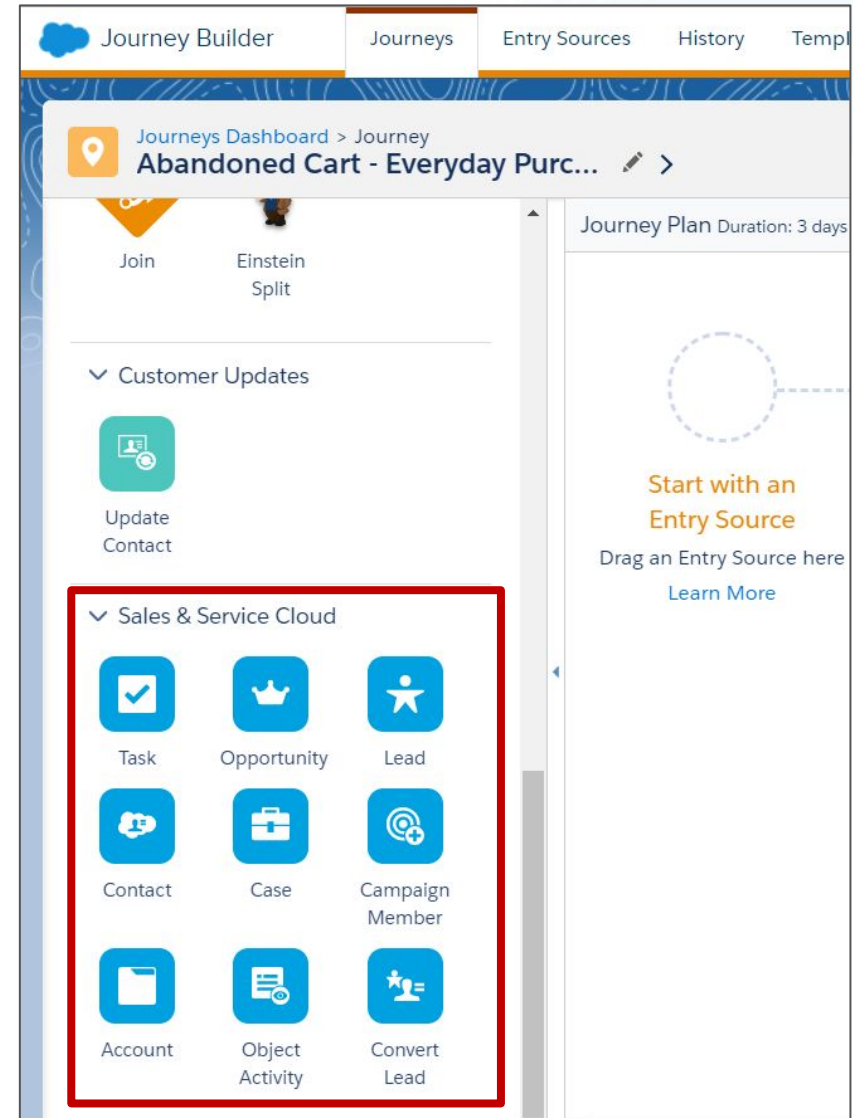
Activities > Customer Updates:

Update Contact: Set an attribute or value in a Marketing Cloud data extension when the contact reaches this step.

Activities > Sales and Service Cloud (requires Marketing Cloud Connect):

Create or update the following Salesforce objects when the contact reaches these steps:

- Task
- Opportunity
- Lead
- Contact
- Case
- Campaign Member
- Account
- Object Activity
- Convert Lead



Administration Overview (1)

Configure your journey

Version:

Iterate journeys with versioning.

Goal / Exit Criteria:

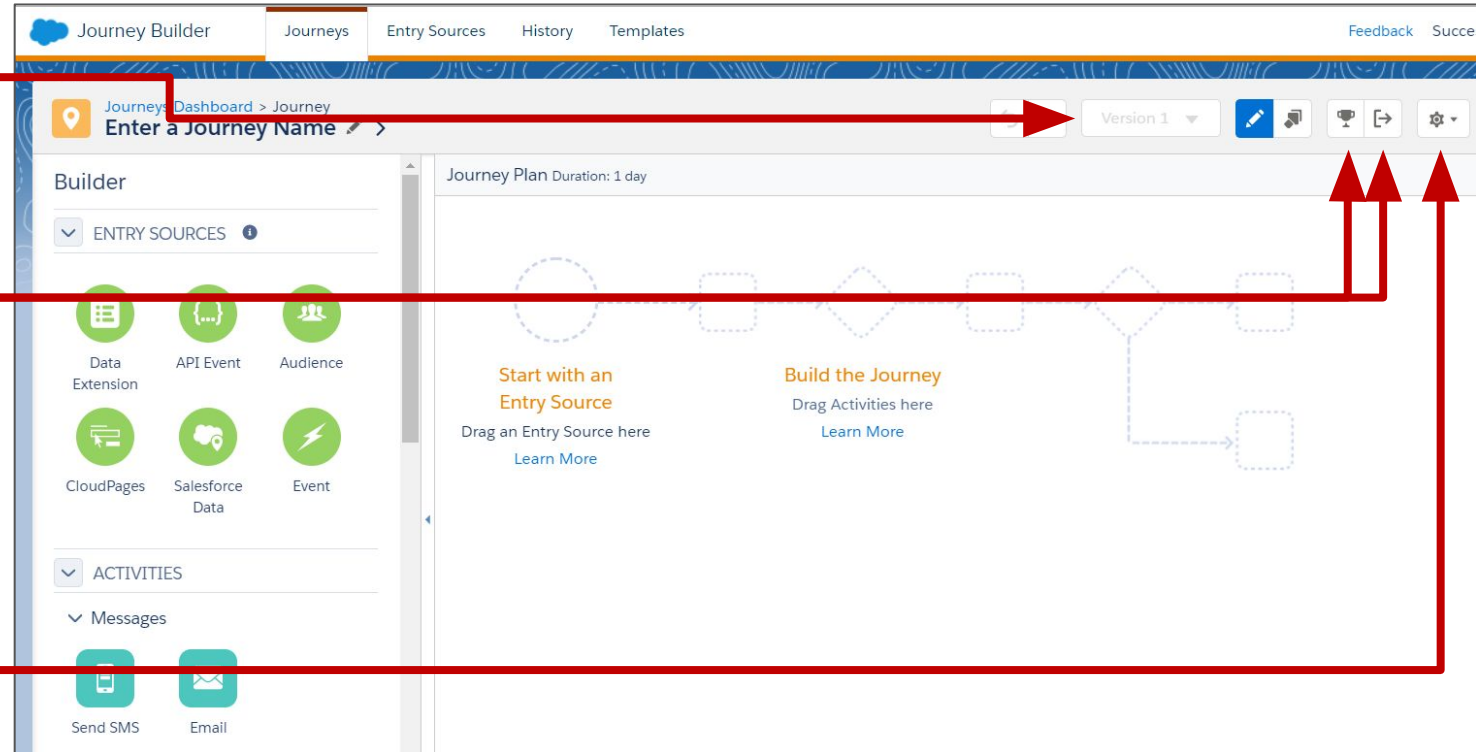
Create an associated goal event.

Determine the behavior for exit criteria to be met; Contact is ejected from journey.

Settings:

Contact entry: Configure if a customer can be in a journey more than once.

Default channel addresses: Determine the location of the default email address and/or mobile number to be used in this journey.



An Introduction to Journey Strategy



Five Steps to a Journey Strategy



**Goal
Setting**



**Audience
Definition**



**Data
Audit**



**Content and
Channels**



**Journey
Mapping**

Customer Journey

What does it mean?

A series of steps a customer goes through during an interaction with a company. It concerns itself with all channels, touchpoints, systems, people, objects, etc. involved directly or indirectly with the interaction.



The Best Customer Journeys Are ...



Connected

Deliver one experience across sales, service, marketing, commerce, and apps.



Personalized

Tailor experiences that are based on the preferences and behaviors of each customer.



In Real Time

Respond to customers in the moment they need help.

67% of consumers and 64% of businesses state they will switch brands if companies don't recognize them and anticipate their needs*



* [2016 State of Connected Customer](#) | October 2016. Salesforce.com

* [2016 State of Marketing](#) | September 2017. Salesforce.com

Journeys Are Building Blocks of Customer Experience

With the customer in control of the journey, how do you guide them?

Awareness & Acquisition

- Informational
- Welcome New Subscribers
- First Purchase
- Refer a Friend

Onboarding & Engagement

- Encourage Sign-ups
- Influence Next Purchase
- Download the Mobile App
- Encourage Survey Completes
- Profile Completion

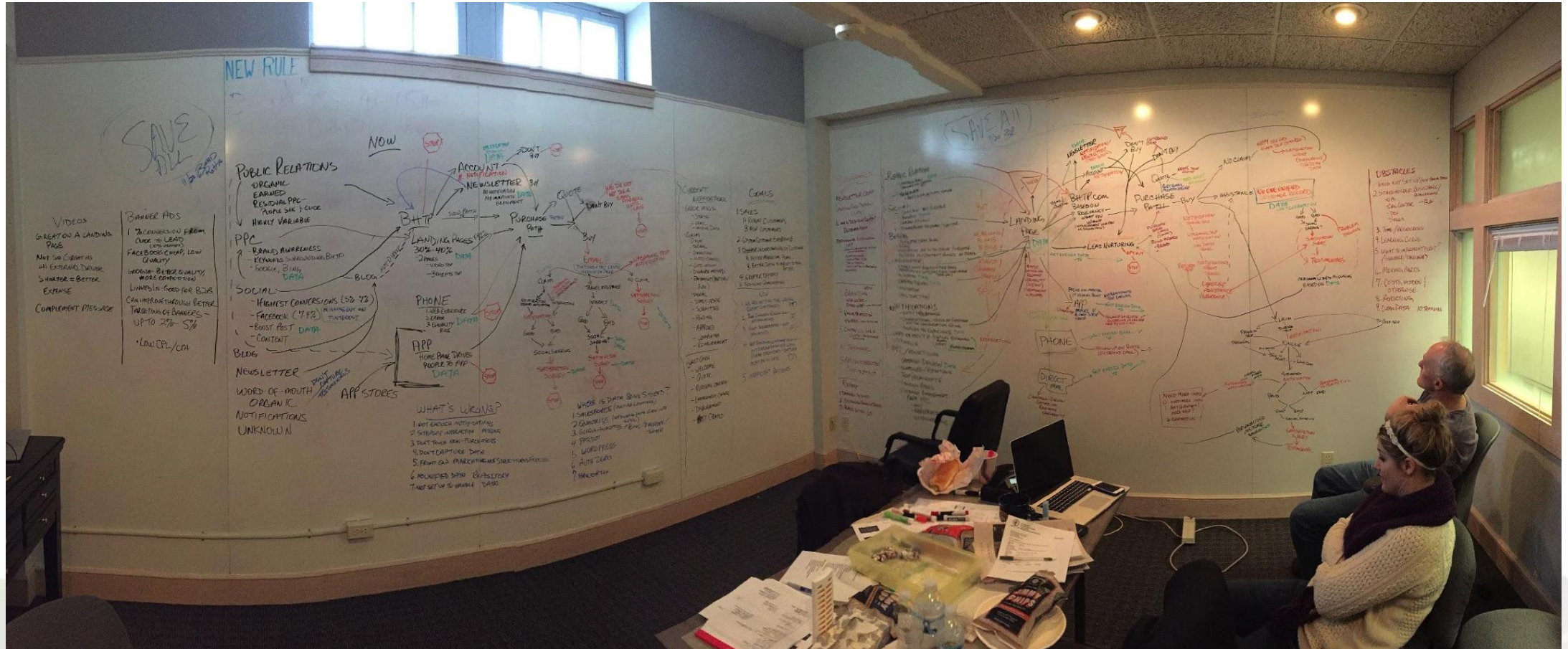
Retention & Advocacy

- Product/Service Review
- Abandoned Cart
- Re-Engagement
- Win-back
- Birthday/Anniversary



Mapping the Entire Customer Experience

Though valuable, it can be a challenging process



You Crawl Before You Walk, Run When You're Ready

Start off slowly before you reach all touchpoints

Run



Expand and provide more channels and more decision points.

Walk



Test, iterate, extend, and add channels.

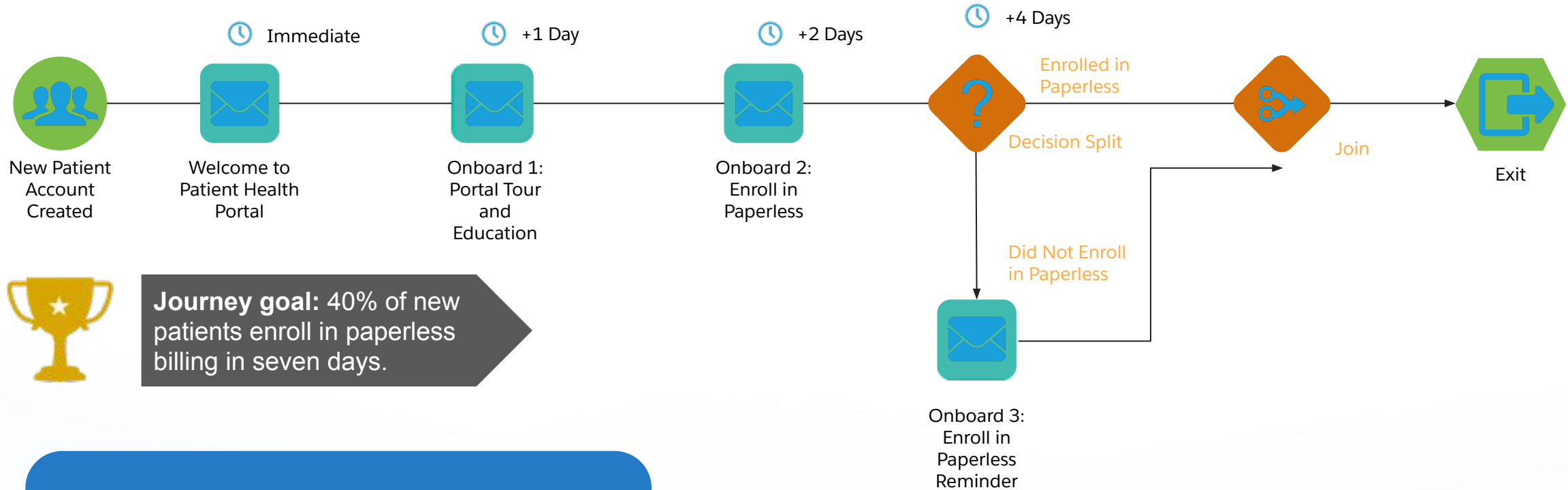
Crawl



Start simple, lay a foundation, and use what you already have.

Anatomy of a Journey

What you can expect to see - Healthcare use case



Journey goal: 40% of new patients enroll in paperless billing in seven days.

- Every journey has:
- A goal
 - An audience
 - Channels
 - Decisions and splits
 - Content
 - Data

Approaching Your Journey Strategy



Goal



Audience
Definition



Data
Audit



Content and
Channels



Journey
Mapping

Setting Your First Journey Goal





Goal

What Are You Hoping to Achieve With This Journey?

The goal is your destination

A high-level goal directs the development of your journey.

- Helps you focus your efforts.
- Start small and refine it as you develop your strategy.

Consider your business strategies:

- Where do you need to focus your efforts?
- What areas of the business could you affect?
- What is a quick win?

Think of this like a New Year's Resolution

- Good intentions.
- Right direction.
- A place to start.





Goal

What is Your Goal?

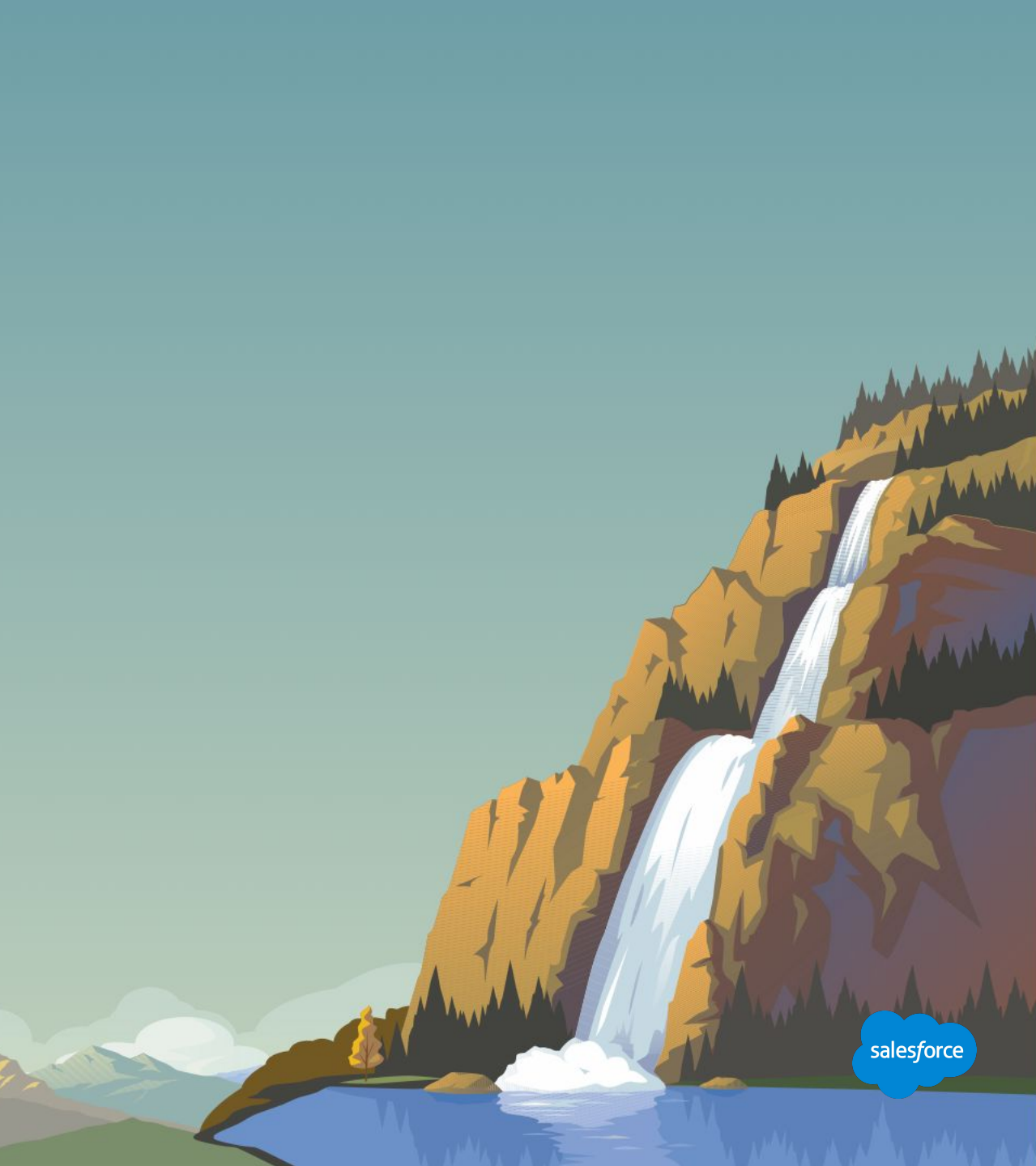
For Example:

- Acquire new customers.
- Increase engagement with wellness programs.
- Increase renewal rates among members.
- Acquire new account holders.
- Decrease abandoned cart rates.
- Decrease Attrition.
- Drive more engagement.
- Increase subscriptions
- Encourage profile completes.
- Reduce service calls.
- Upsell Services.



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Define Your Audience





Do Your Homework

Understand the customer experience

- 1 Know your customer's lifecycle.
- 2 Audit today's customer experience.
Be objective and honest.
- 3 Identify moments that matter in your customer's experience.



Audience

Know Your Customer's Lifecycle

Standard Lifecycle Template - Start here, and then make it your own





Audience

Audit Your Customer Experience

Become Your Own New Customer



Document
Everything



Google Your
Brand and
Market



Become a
Customer of
your
Competition



Search Social
Media



Identify Moments That Matter

Big decisions start with small moments

I-Want-to-Know Moments

The customer is seeking useful information – this is the research stage.

I-Want-to-Go Moments

The customer is looking for a local option.

I-Want-to-Do Moments

The customer is seeking how-to information; the right content is key.

I-Want-to-Buy Moments

The customer is ready to buy, but may still need help finding the right fit.

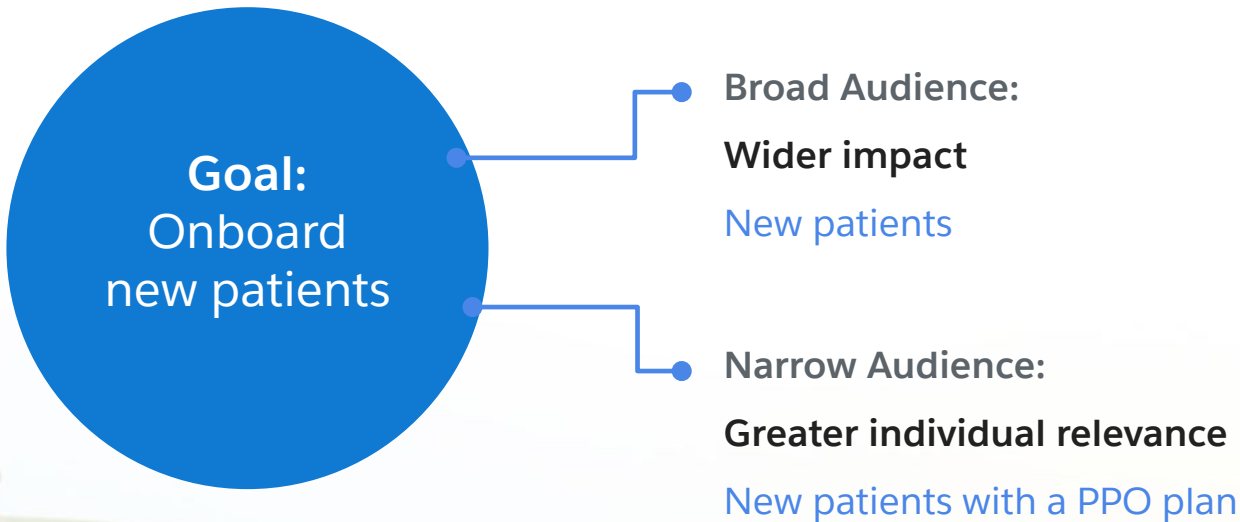


Audience

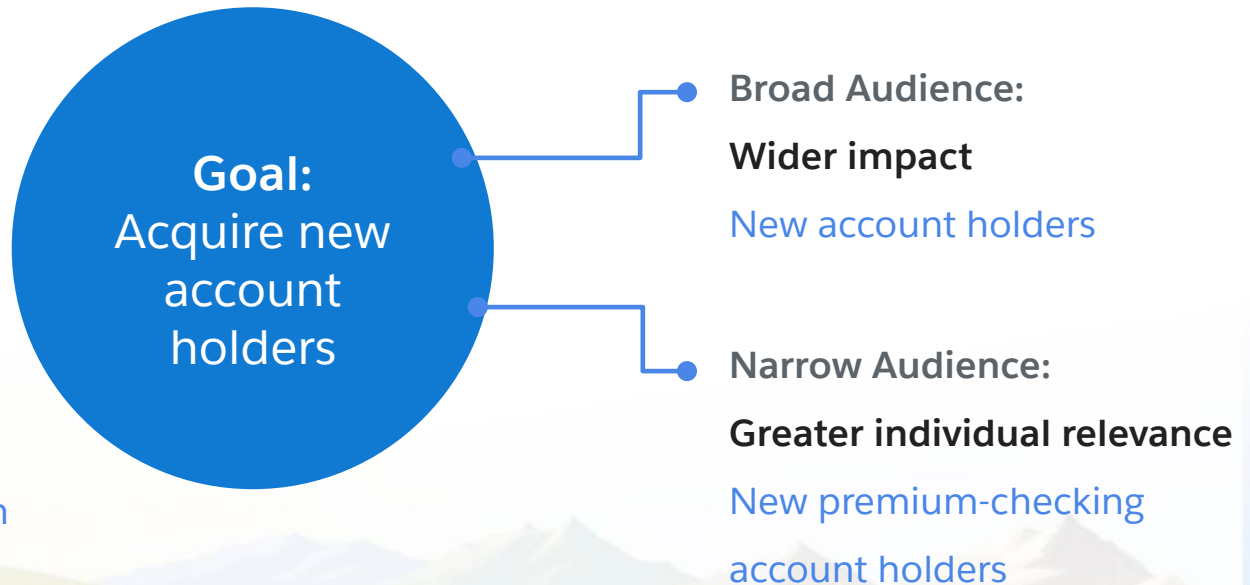
Who Do You Want to Reach?

Identify the right segment for your journey

Healthcare Example



Financial Services Example



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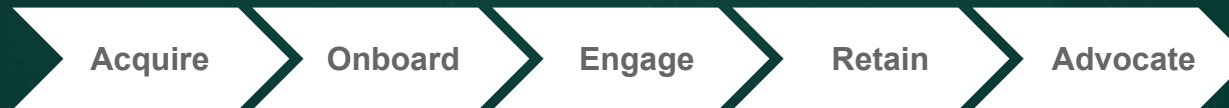


Defining Your Audience

Let's Brainstorm for a few minutes.

List the steps in your customer lifecycle (or use ours), and answer the following questions:

- What areas need improvement?
- Where could you make the most impact?
- What moments are most critical to your customer engagement?
 - LIST AND PRIORITIZE
- What moment aligns with your business strategy at this point in time?
- Now Select a Phase in the Customer Lifecycle to focus this plan on.
- What should we call this journey?





Who should we put on this journey?

For Example:

Acquire

- Friends of current members who have never before tried our product/service.

Onboard

- New Premium Checking Account Holders.

Engage

- Our subscriber base who has shared their birthday with us and hasn't scheduled a checkup in a year or longer.

Retain

- Customers whose shipments were delivered after the promised time Frame.

Advocate

- Customers who have given reviews in your community.



Identify Data Needs



Identify and Collect Your Data Needs

Harness all your customer data, from any data source

Start with what you have, and build on that data over time, such as:



Basics - Name, address, email



Browsing behavior



Demographics



Email engagement



Purchase history



Preferences



Do an Inventory

Start with what you have already, and go from there

Check the Data You Have

Check your data quality, accessibility, and completeness:

- Where does this data come from?
- What is the source?
- Where does it live?
- How complete is it?
- How easy is it to access and use?

Document the Data You Need

Define the data you're missing:

- Does it exist but is inaccessible?
- Do you need to start collecting it?

Envision the Data You Want

Dare to dream about the hard-to-access data points.

What Data Do You Have or Need?

List the customer data types you currently have, and circle the ones you use most:

This could include demographics, purchase and browsing history, click-through rates, feature preferences, and more.

List the customer data types you still need:

- Dream big! For example, find out what is the average amount of time it takes a customer to make a second purchase.
- Learn how subscribers enroll through social ads, display ads, or elsewhere. The first step in getting this data is identifying the need.



What Data Do You Need?

Healthcare Example:

- Customer birthday: month and day
- First name
- Last name
- Email address
- Mobile number
- Scheduling flag
- Appointment details (time, date, and so on)
- Location

Refer-a-friend Example:

- Customer status: new
- Unique referral code
- Account setup date
- First & Last name of existing subscriber
- Email address of existing subscriber
- First & Last name of new subscriber
- Email address of new subscriber

Finserv Example:

- Account type: premium checking
- Customer status: new
- Paperless enrollment: no
- Account open date
- First name
- Last name



Refine Your Goal





Goal

Now make it SMART

Be honest and accountable

Specific

Make it easy to understand, and use concrete action verbs.

Measurable

Identify the factors involved and sets measures for them.

Attainable

Make it challenging but possible.

Relevant

Keep it in alignment with the greater goals of the organization.

Time-Bound

Ensure the efforts stay at the top of the priority list.





Goal

How Can You Make Your Goal SMART?

What did you learn from your Audience and Data audit?

Your audience and your message:

Who is your audience?

Who does your message reach now, and who else would you like it to reach?

Customer retention:

What do your customers want from you?

Why did they seek you out initially, and what keeps them coming back?

Giving more to your customers:

What information are your customers missing that you want them to know about?

Are they missing out on any great products or services?



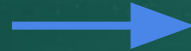


Goal

What is Your Refined Goal?

Initial Goal Examples

Acquire new patients.



Increase engagement with wellness programs.

Increase renewal rates among members.

Acquire new account holders.

Decrease abandoned cart rates.

Decrease Attrition.

Refined SMART Goals

Receive 25 new patient appointments in the Women's Center in the next three months.

Increase the number of patients involved in wellness coaching programs by five percent this year.

Increase renewal rates among members from 40% to 50% by the end of Q2 next year.

Acquire 10,000 new Premium Checking account holders this fiscal year.

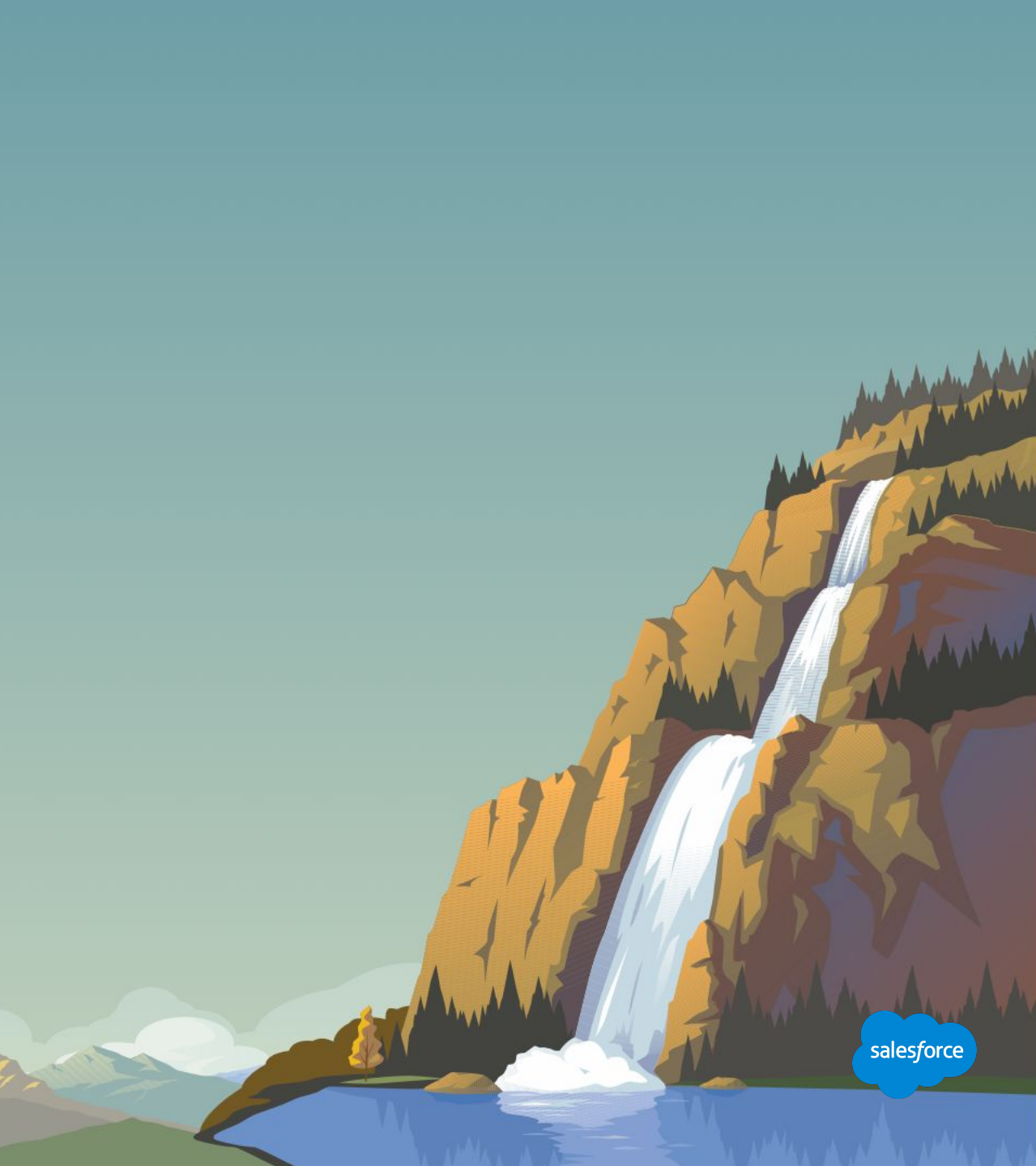
Decrease abandon cart rates from 75% to 70% by the end of this quarter.

Decrease customer attrition by 15% among customers who experienced delivery delays in this fiscal year.



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Your Channels and Content





Choosing Your Channel

Which Channels do you Use Today? Which would you like to use?





Choosing the Right Channel(s) for Your Message

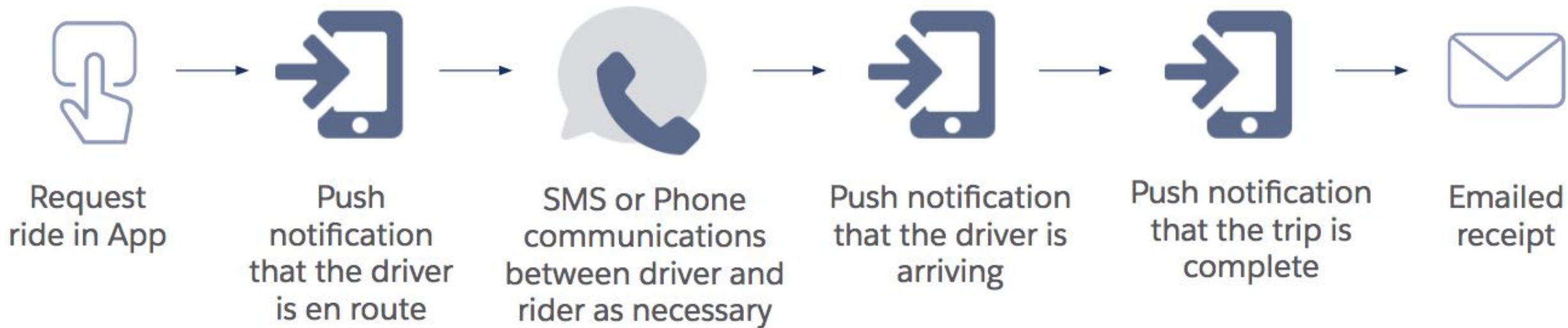
Right Channel. Right Message. Right Time.

	Email	SMS	Push Message	Direct Mail
Channel Tolerance	Relatively high	Very low	Very low	Relatively high
Consumer Reach	77% Consumers have opted into a retailer's email program	37% Consumers have opted into SMS programs – SMS list size is generally 10% of email	60% Consumers have opted into App push notifications	42% Recipients scan the direct mail pieces being sent to them



Using Multiple Channels

Consider a prominent Salesforce customer's approach.





Consider Content Inside Your Journey

Content that's delivered right in the message – no switching screens

Email Content	SMS Content	Social Content	Push Content
<ul style="list-style-type: none">• Copy• Images• Animated GIFs• Some video• Personalized metrics• Live text• Countdown timers• Transaction and account info• Social media highlights	<ul style="list-style-type: none">• Copy• Transaction or account info• Targeted offers• Alerts• Geo-targeted messages• Images (MMS)• Animated GIFs (MMS)	<ul style="list-style-type: none">• Broad 1: many messages• Social service 1-on-1 messages• Discount codes• Images• Third-party links• Animated GIFs• Video• Polls• Contests	<ul style="list-style-type: none">• Copy• Emojis• Transaction and account information• Close-proximity messages (beacons)

Examples (Not Comprehensive)



Consider Content Outside Your Journey

Resources, like web content, that customers access with a click or tap

Web Content

- Infographic
- Blog post
- Video
- Playlist
- Guided selling tool
- How-to guide

Downloadable Content

- Checklist
- White paper
- Report
- eBook
- Map
- App
- Browser plugin

Interactive Content

- Event
- Quiz
- Webinar
- Online course

Examples (Not Comprehensive)



Create Customer-Focused Content

These familiar concepts apply to providing the right content



Crawl

Have

What content do you already have that's good to use for this audience and journey?



Walk

Need

What content do you need to create?



Run

Want

What kind of content delights the recipient and assists them during their journey?



What Content Should You Consider?

Your content and your customers:

- What kind of content helps your customers discover and understand your brand?
- Do you support and inform your customers with your content?
- Do they see you as a valuable resource?

Make your content go further:

- What content do your customers want or consume most?
- What drives the most interaction with your brand?
- How can you expand on it?

Identify effective content:

- Check off the types of content listed below that you've used in the past.
- Circle the assets that are proven effective.
- Make a note of content types you'd like to use but haven't.





What Channels Will You Use and Why?

Healthcare Example:

- **Email:** Easily triggered and easy for customer to return to.
 - Send initial check-up scheduling reminder (on birthday).
- **Email:** Easily triggered and easy for customer to return to.
 - Send second checkup scheduling reminder.
- **Direct mail:** Another Channel if no response from email.
 - Send next appointment recommendation.
- **SMS reminder:** Another Channel if no response from email.
 - Scheduled appointment reminder.



Journey Mapping



Bringing the Pieces Together

Review Your Findings:

- Review your SMART Goal.
- Who's Your Audience?
- Do You have the right data to start?
- What channel(s) will you use?
- What Content will you use or need?

Roughly map out your first journey - Crawl, Walk, Run.



Journey Mapping

Brainstorming, planning and visualizing the ideal experience

Start Small. Use Your Research:

1. Focus on that one key moment that addresses your goal.
2. Identify key interactions that the customer has with your organization during that moment.
3. Plan the various ways you might interact with your customers across various channels.
 - a. What can you impact? Plan - measure - and attain results?
4. Draft Your ideas in a way you can easily communicate with your team and make changes.
5. Then match your data and content with your plan to build your journey.

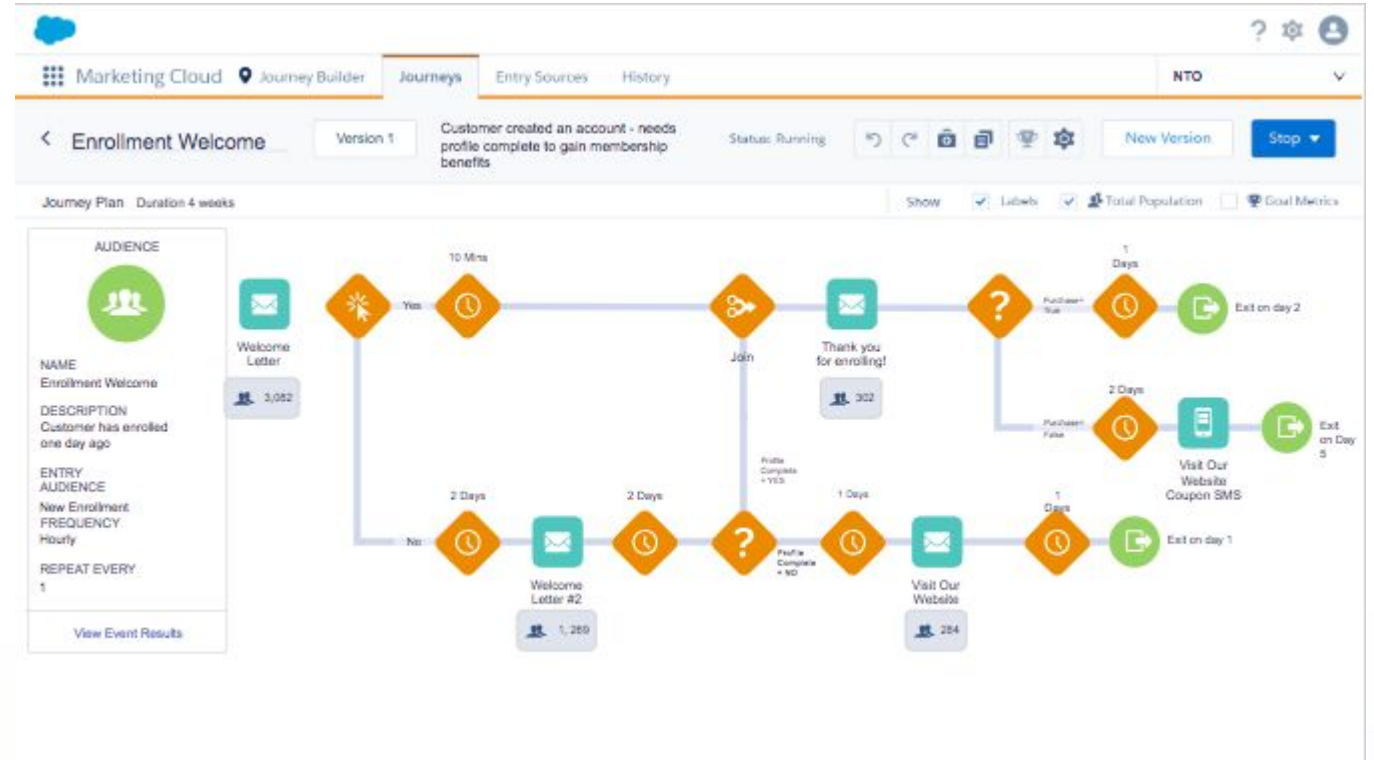


Testing and Adjusting

The process doesn't stop at launch

How to get from Crawling to Running:

1. Analyze initial results.
 - a. What's working? Identify what's not.
 - b. Where are people falling off?
2. Adjust based on results.
 - a. Maybe you need more data?
 - b. Maybe more channels?
 - c. Maybe a different point of interaction?
3. Continually test and refine.



Journey Examples Across the Lifecycle



Acquire

ACQUIRE

ONBOARD

ENGAGE

RETAIN

ADVOCATE



Acquisition Example: Refer-A-Friend

SMART Goal: Increase number of new meal subscriptions by 15% in Q2

The plan: Request that current members refer the service; offer new subscribers a discount when they try the service for the first time.

Audience

Friends of current members who have never before tried the service

Data

- Customer status: new
- Unique referral code
- Account setup date
- First name of existing subscriber
- Last name of existing subscriber
- Email address of existing subscriber
- First name of new subscriber
- Last name of new subscriber
- Email address of new subscriber

Content

- Invitation to existing subscriber offering discount to friends
- Welcome message explaining service and offering discount to potential subscriber
- Reminder send to potential subscriber
- Confirmation send to existing subscriber when offer has been redeemed

Channel

Email:

- Easily triggered
- Easy for customer to return to
- Content doesn't require immediate response or action

Social share:

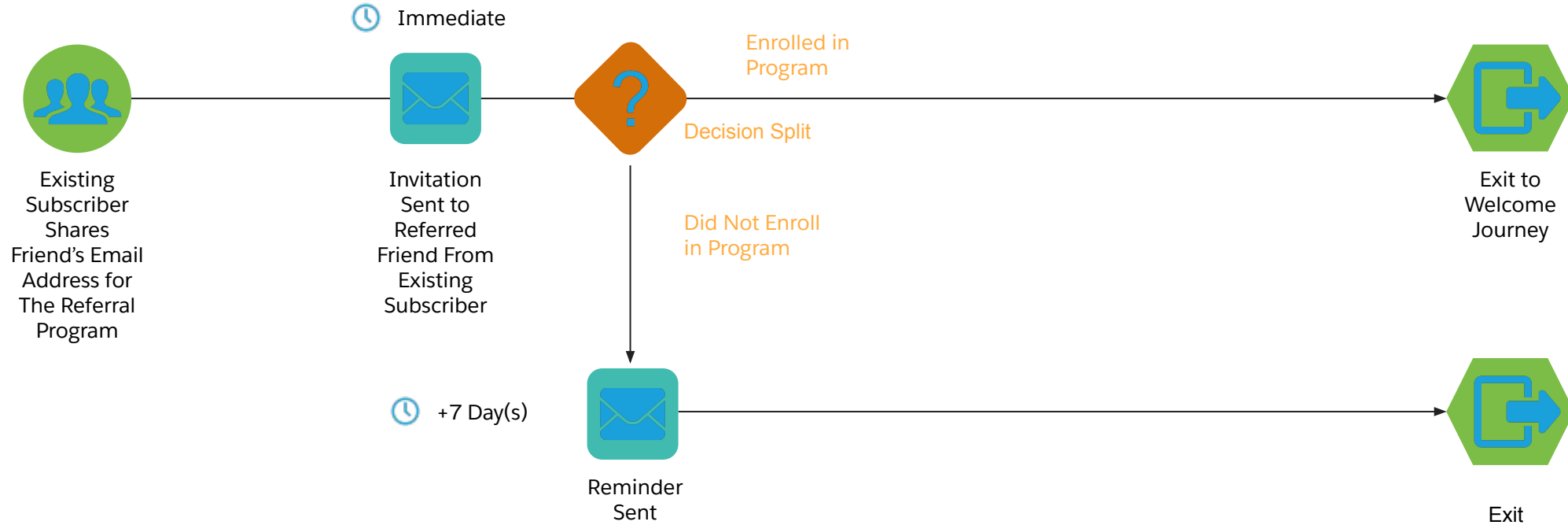
- Ability to broadcast message to a wide audience

SMS:

- Very personal – send from friend to friend
- Easy for quick sharing

Sample Acquisition Journey - Crawl

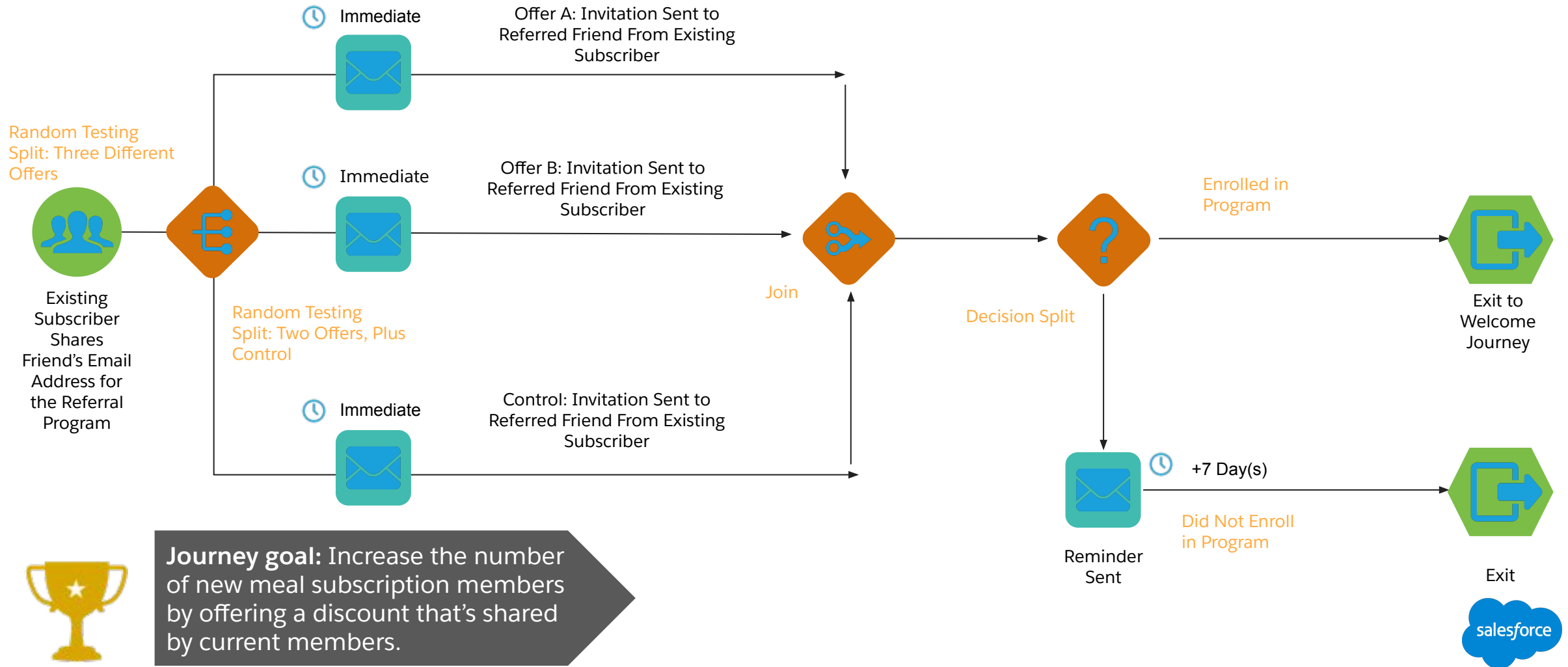
Refer-A-Friend



Journey goal: Increase the number of new meal subscription members by offering a discount that's shared by current members.

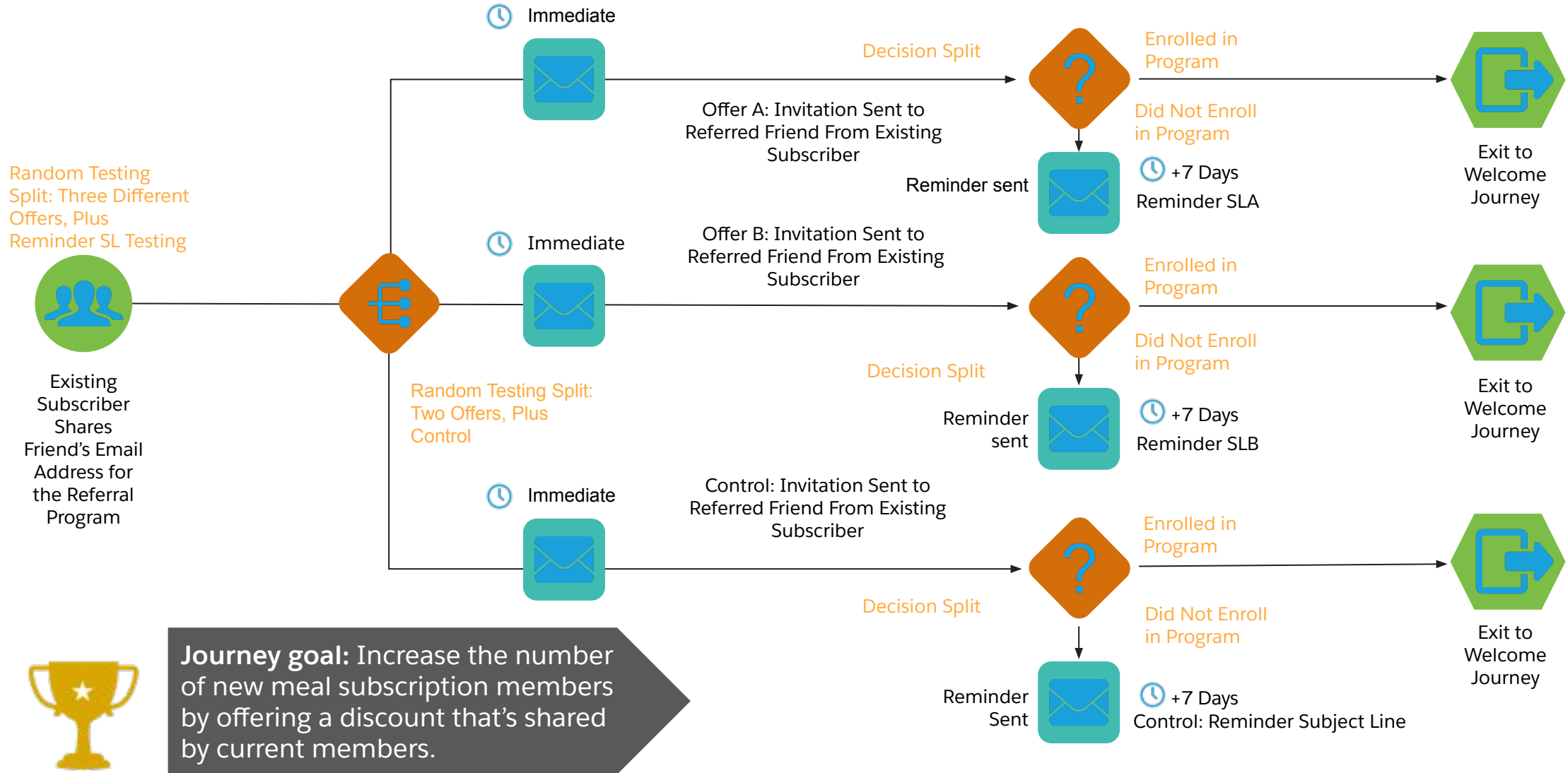
Sample Acquisition Journey - Walk

Refer-A-Friend



Sample Acquisition Journey - Run

Refer-A-Friend



Onboard



Onboard Example: Financial Services

Goal: Increase rate of paperless-statement enrollment

SMART Goal: Increase the rate of paperless-statement enrollment among new premium checking account holders from 65% to 80% by June 2019.

Audience

New premium checking account holders.

Data

- Account type: premium checking
- Customer status: new
- Paperless enrollment: no
- Account open date
- First name
- Last name

Content

- Welcome message “About your new account” educational message.
- Interactive account walk-through.
- Paperless enrollment landing page.

Channel

Email:

- Easily triggered
- Easy for customer to return to
- Content doesn't require immediate response or action

Sample Onboarding Journey - Crawl

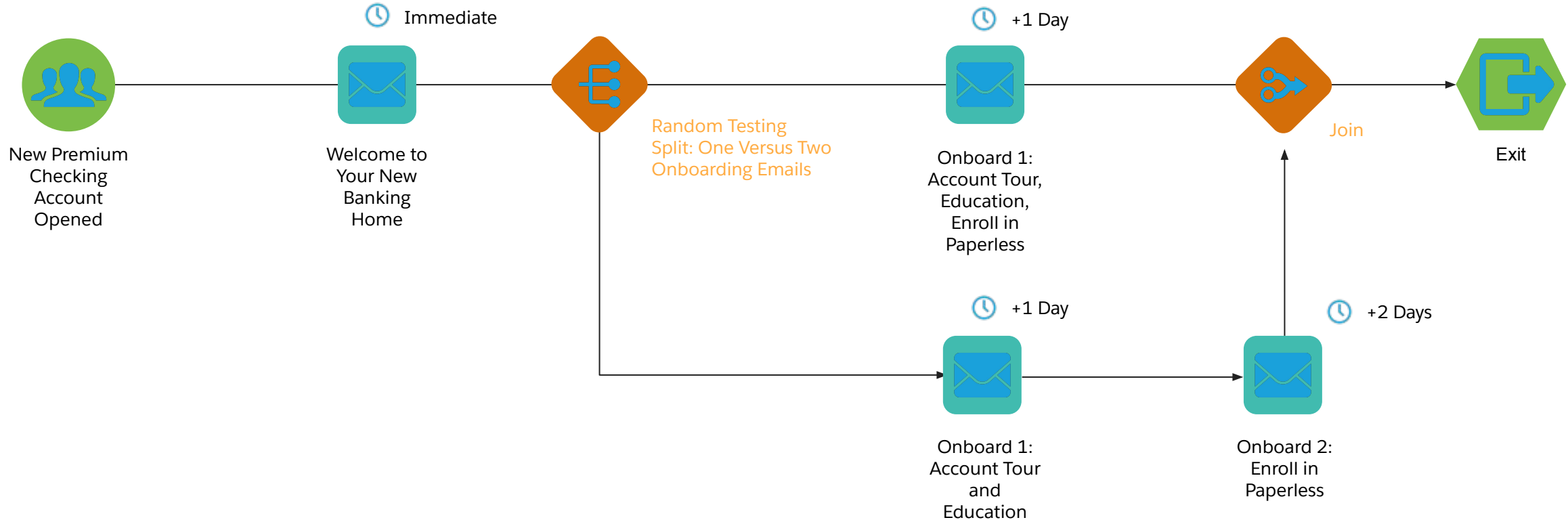
New Account - Financial Services



Journey goal: New premium checking account customer enrolls in paperless.

Sample Onboarding Journey - Walk

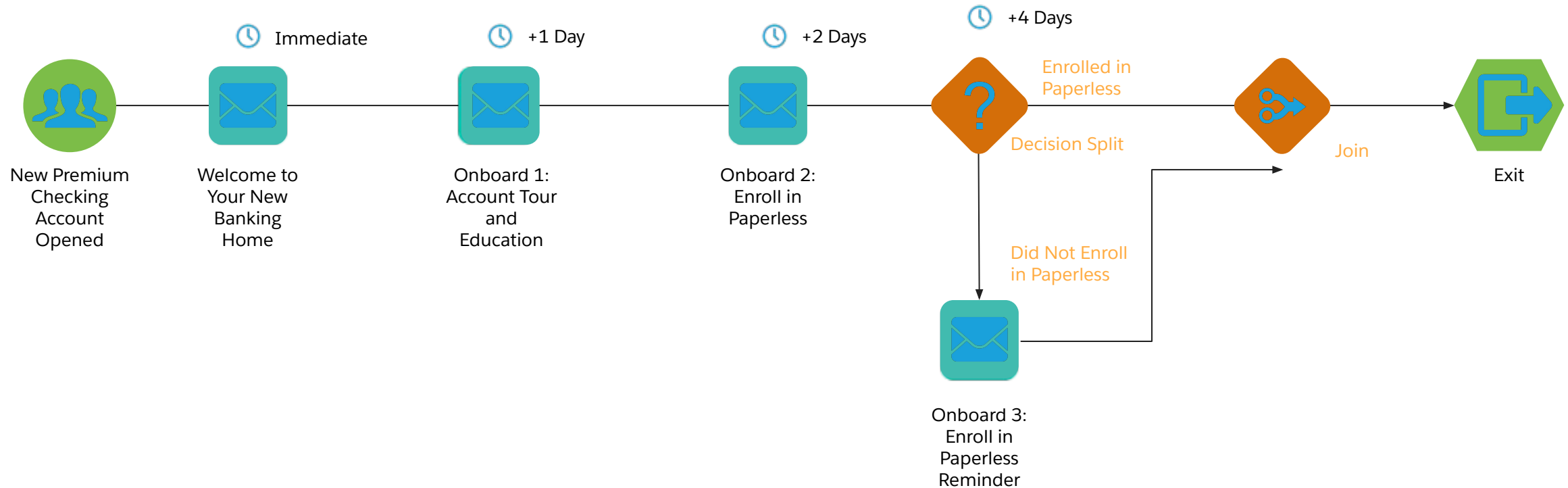
New Account - Financial Services



Journey goal: New premium checking account customer enrolls in paperless.

Sample Onboarding Journey - Run

New Account - Financial Services



Journey goal: New premium checking account customer enrolls in paperless.

Engage

ACQUIRE

ONBOARD

ENGAGE

RETAIN

ADVOCATE



Engage Example: Birthday Offer

Goal: Achieve 30% offer redemption at the end of 2018

Audience

Subscriber base who has shared their birthday with us.

Data

- Customer birthday: month and day
- First name
- Last name
- Email address
- Coupon code
- Redemption flag

Content

- Happy birthday email with offer or gift sent in advance
- Happy birthday email with offer or gift sent on birthday
- Final happy birthday reminder

Channel

Email:

- Easily triggered
- Easy for customer to return to
- Content doesn't require immediate response or action

Push:

- Ability to act on offer from within the app
- Can be triggered by beacon

SMS:

Valuable for final reminder when offer is close to expiration

Retain

ACQUIRE

ONBOARD

ENGAGE

RETAIN

ADVOCATE



Retain Example

Goal: Decrease customer attrition

SMART Goal: Decrease customer attrition by 15% among customers who experienced delivery delays in this fiscal year.

Audience

Customers whose shipments are delivered after the promised time.

Data

- Shipment date
- Number of parcels
- Delivery service and speed purchased
- Promised date and time
- Delivered date and time
- Origin and destination zip code
- Account ID
- First name
- Last name

Content

- Transactional data
- “We’re sorry” message
- Impact-to-business survey
- Significant delay offer
- Service case automated content

Channel

Email:

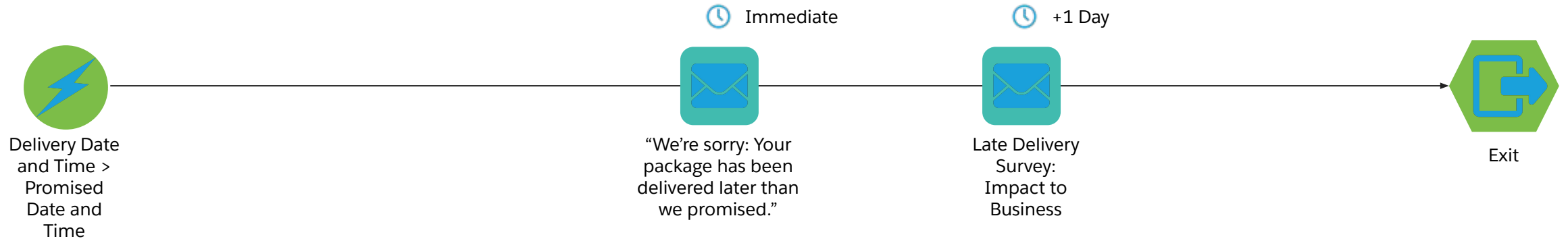
- Easily triggered
- Easy for customer to return to
- Content doesn’t require immediate response or action

Customer service CRM:

- Use journey data to trigger personalized customer service

Sample Retention Journey - Crawl

Logistics winback program

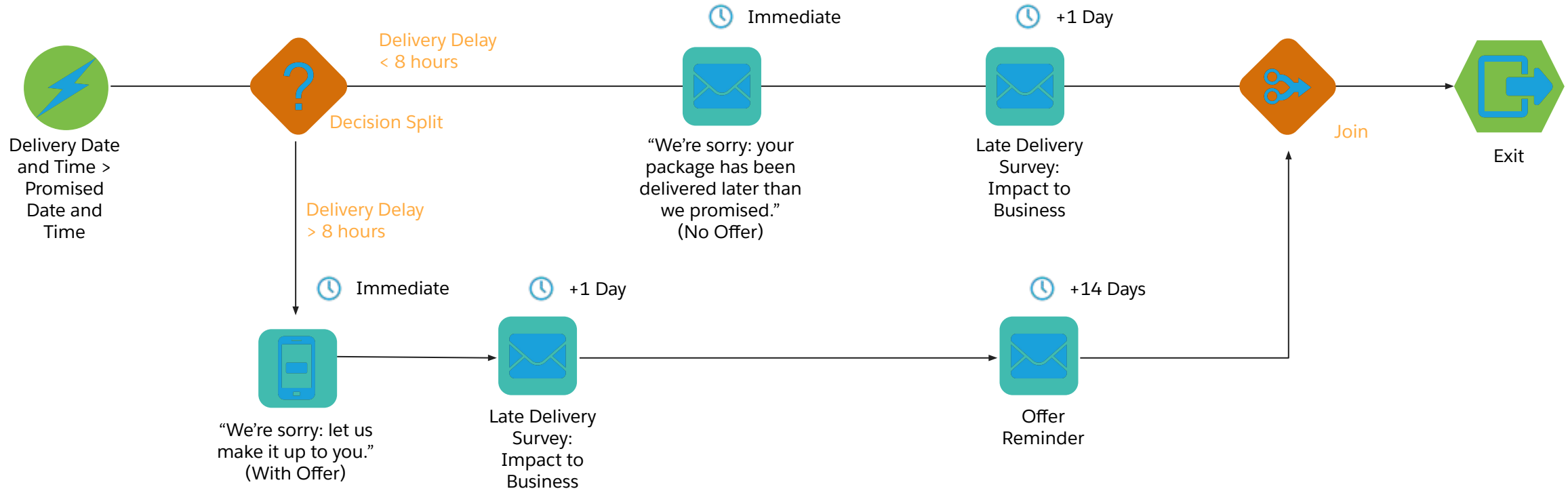


Journey Goal: Decrease attrition by 15% this fiscal year.



Sample Retention Journey - Walk

Logistics winback program

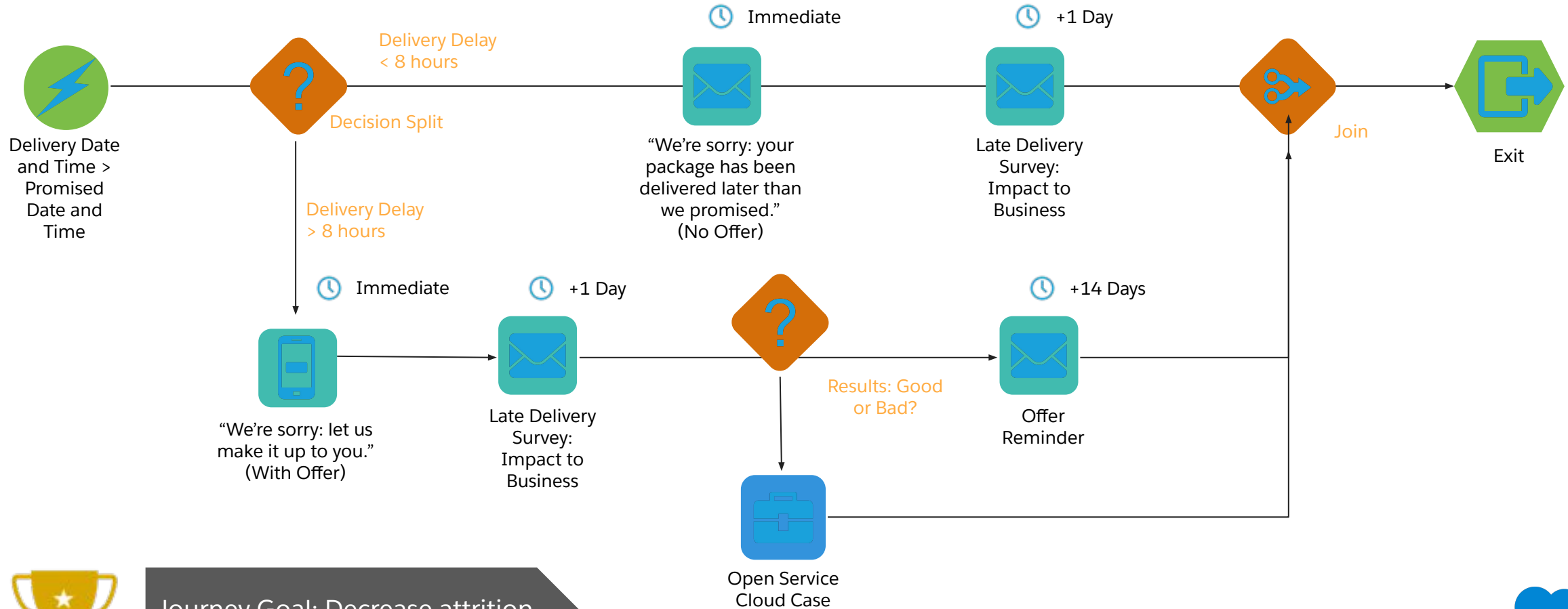


Journey Goal: Decrease attrition by 15% this fiscal year.



Sample Retention Journey - Run

Logistics winback program



Journey Goal: Decrease attrition by 15% this fiscal year.



Advocate

ACQUIRE

ONBOARD

ENGAGE

RETAIN

ADVOCATE



recap

Five Steps to a Journey Strategy



**Goal
Setting**



**Audience
Definition**



**Data
Audit**

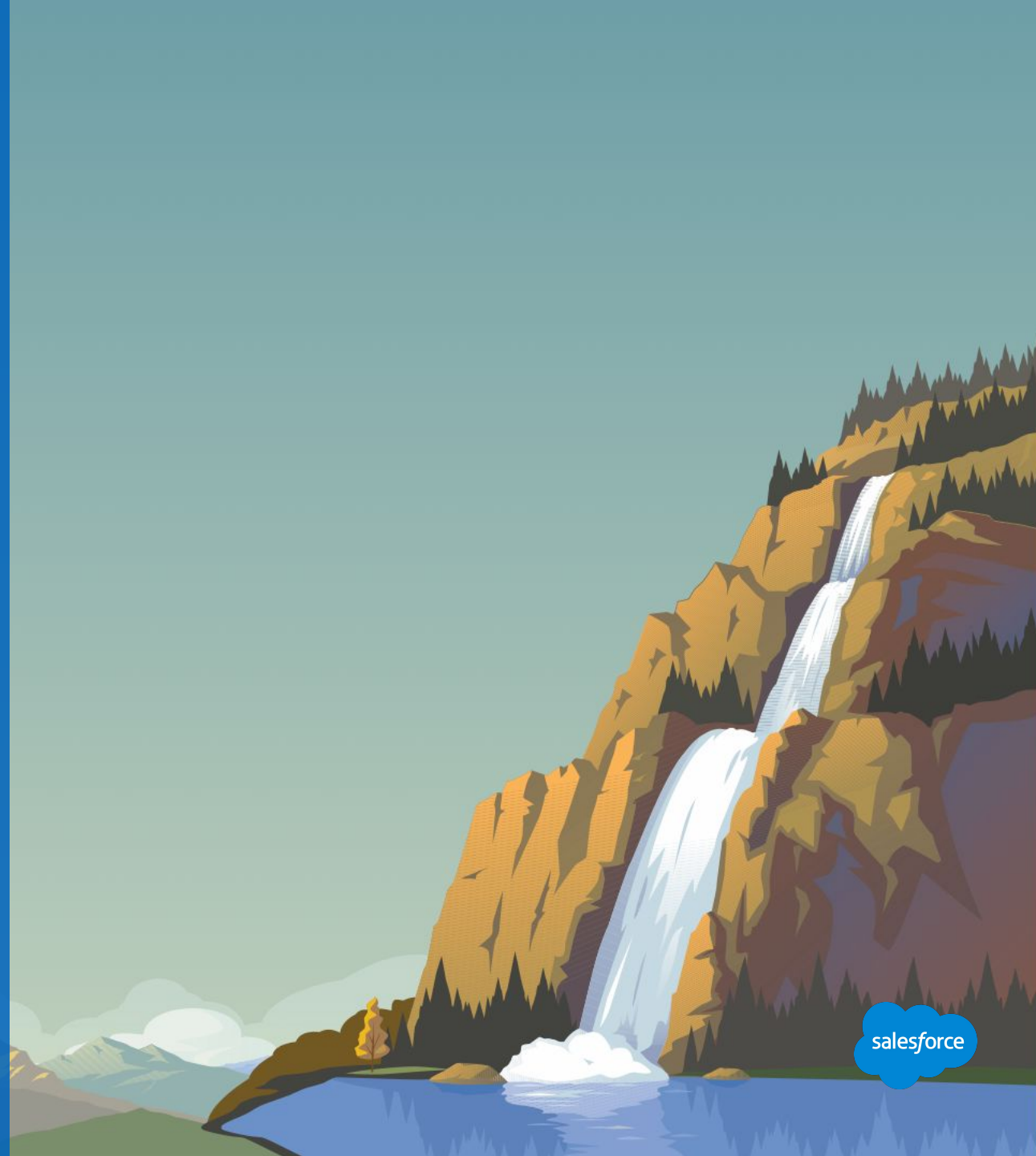


**Content and
Channels**



**Journey
Mapping**

Brief Journey Builder Demo



Next Steps and Resources



Next Steps

Where to go from here

- 1 Join the [Salesforce Marketing Cloud Trailblazer Community](#)
- 2 Take the [Marketing Cloud Trailmix Trail](#)
- 3 **Premier Customers:** Request your 1:1 with a Salesforce Success Specialist and plan your next Accelerator (1:1 follow-up request is in the survey).
- 4 Not a Premier Customer but Interested in Learning More? **Reach out to your Salesforce Account Team** for more details.

We Can Guide Customers Every Step of the Journey

With resources, programs and experts to fit their needs

Adoption Services

Accelerators
Interactive Webinars & Events
Proactive Engagement

Always On Resources

Trailhead
Success Communities
Help Portal

Advisory Services

Architects
Customer-Centric Design
Strategic Services
Transformation Services

Do It
Myself

Show Me
How

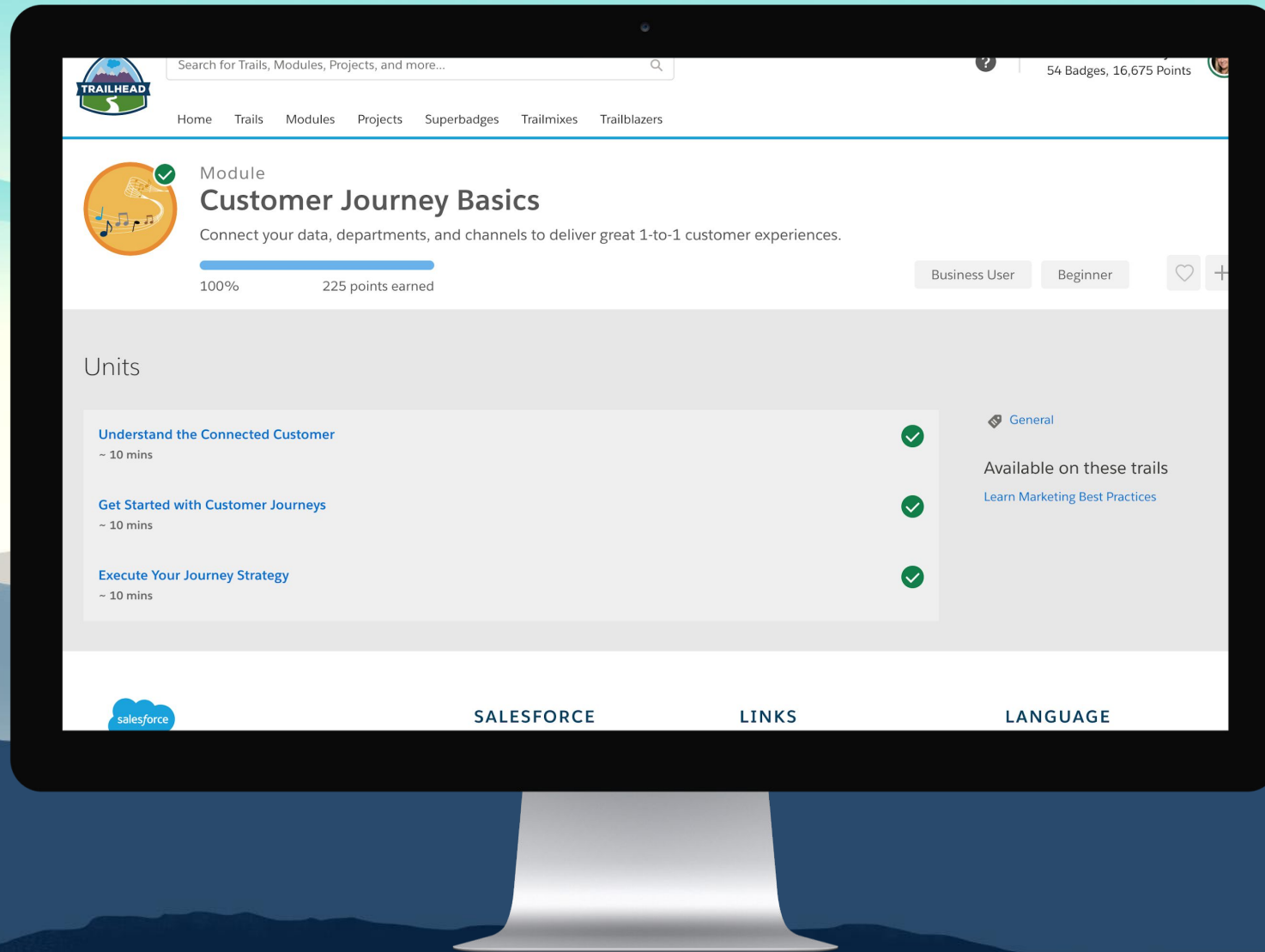
Do It
With Me



customersuccessplatform

salesforce

Take the Customer Journey Basics Trail



Blaze Your Path to Success, Faster

With Success Plans to Take You Further

	Standard	Premier
Guided Journeys	✓	✓
Success Community	✓	✓
Trailhead	✓	✓
Accelerators		✓
Developer Support		✓
Success Management		✓
Circles of Success		✓
Interactive Webinars		✓
Admin Assist		optional upgrade
Support	12/5 Online 2-Day Response	24/7 Phone & Online 1-Hour Critical Response

[Learn more about Premier Success](#)



Thank you

