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Engagement Studio Madness

Executing Journeys the Right Way

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Agenda

- Getting Started
- Building Journeys
- Optimizing Journeys
- Reporting On Journeys

Getting Started

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Getting Started

Goals

- What is your target launch date?

- What's the goal(s) of the journey?
  - Code scans
  - Email clicks
  - Freemium sign-ups
  - Hand raisers
  - Phone calls

- How are we measuring?
  - Will we need a Salesforce report?
  - Will we need a Salesforce dashboard?

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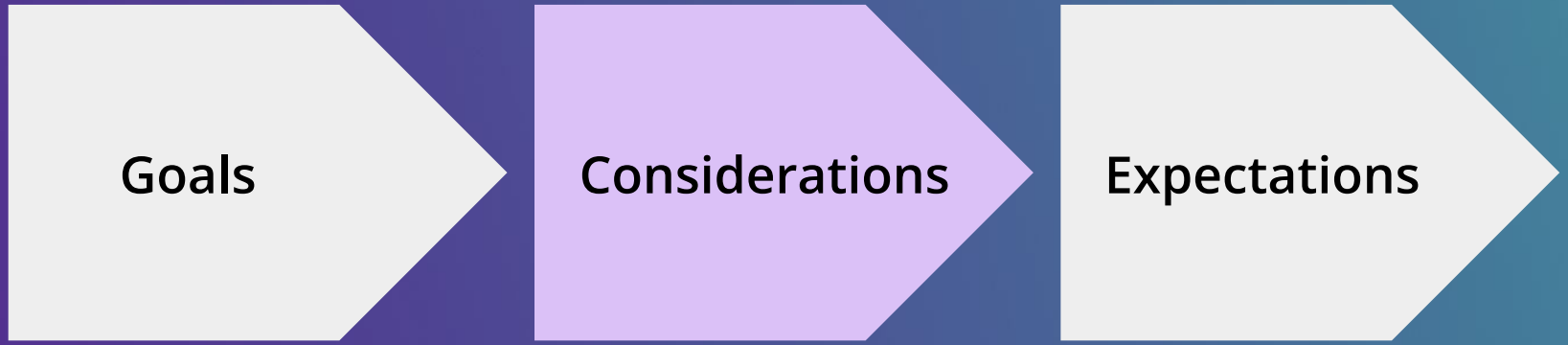
Getting Started



Considerations

- What type of journey should this be? (E.g. Internal, external, or both)
- What channels will be included in this journey? (E.g. Email, SMS, Direct Mail, External Process, Account Engagement Process, etc)
- Is this program targeted at a specific geographic region, time zone, or business hours?
- Who is this journey for? Who shouldn’t enter this journey?
- How long should this journey be?
- Should a Prospect be processed more than once?
- Are we collecting the data needed to successfully execute this journey?

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Getting Started

Expectations

- How will Prospects be added to the program?
- What happens if the Prospect does complete the goal?
- What happens if the Prospect doesn’t complete the goal?
- What happens if someone doesn’t complete the journey?
- What is the expectation for Sales to reach out to the Prospects?
- Will we see engagement data in other systems?

Building Your Journeys

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Engagement Studios Can Be Used For More Than Email Campaigns

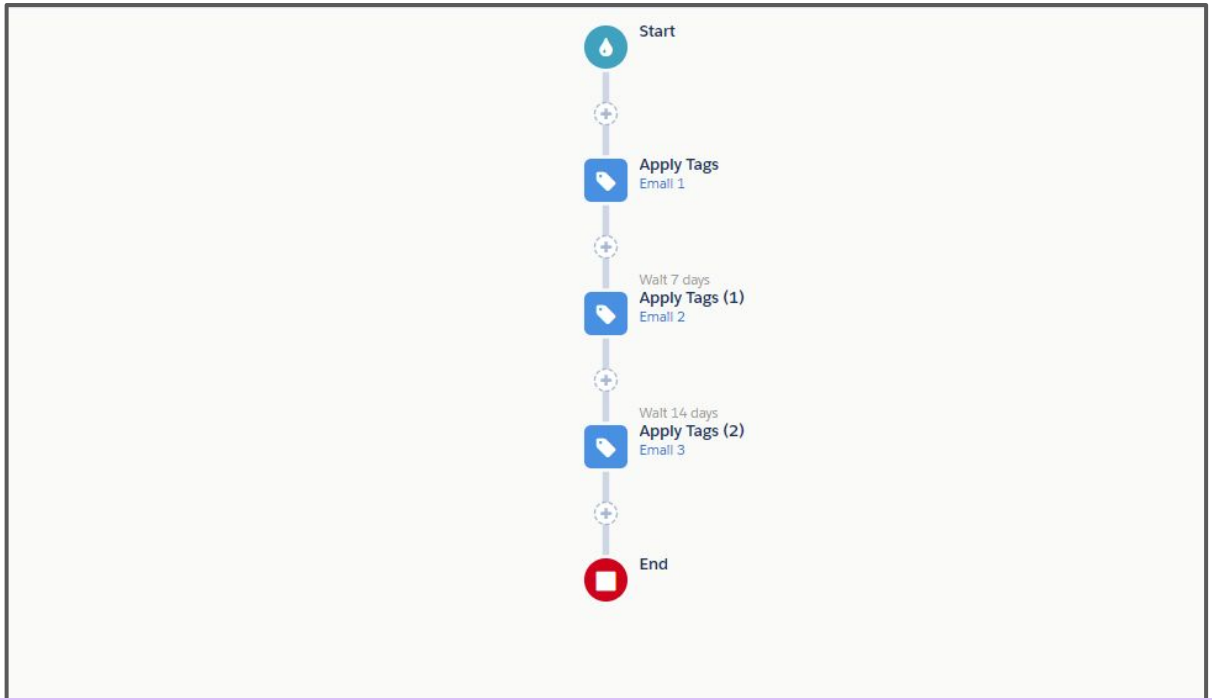
Other Use Cases Include

Singular Processes (Lead Routing) | Repeatable Processes (Campaign Management) | Triggering Direct Mail or SMS Channels | Triggering External Actions

Building Your Journey

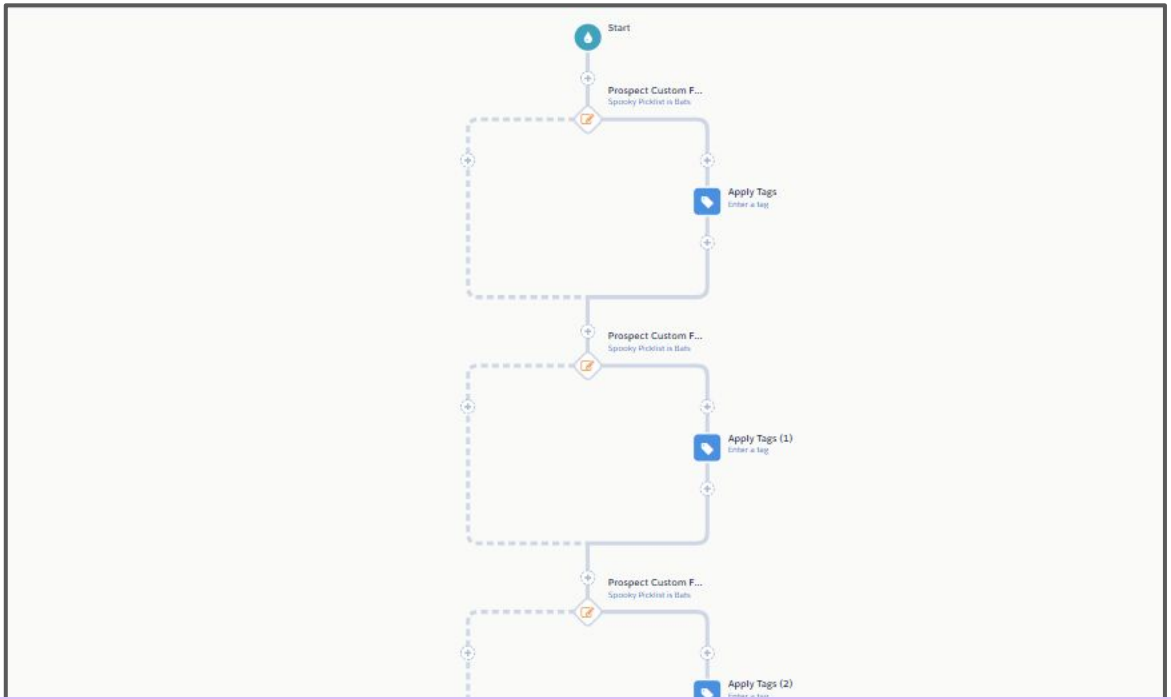
- **Keep it simple**
- Document your program and use templates when possible
- **Draw it out (if needed)**
- Choose your program architecture style
  - Rope, Diamond Chain, Staircase, Waterfall
- Work in pattern clusters
- Have someone else review it
- **Test your program (and include your team in the launch)**

Architecture Type - Rope



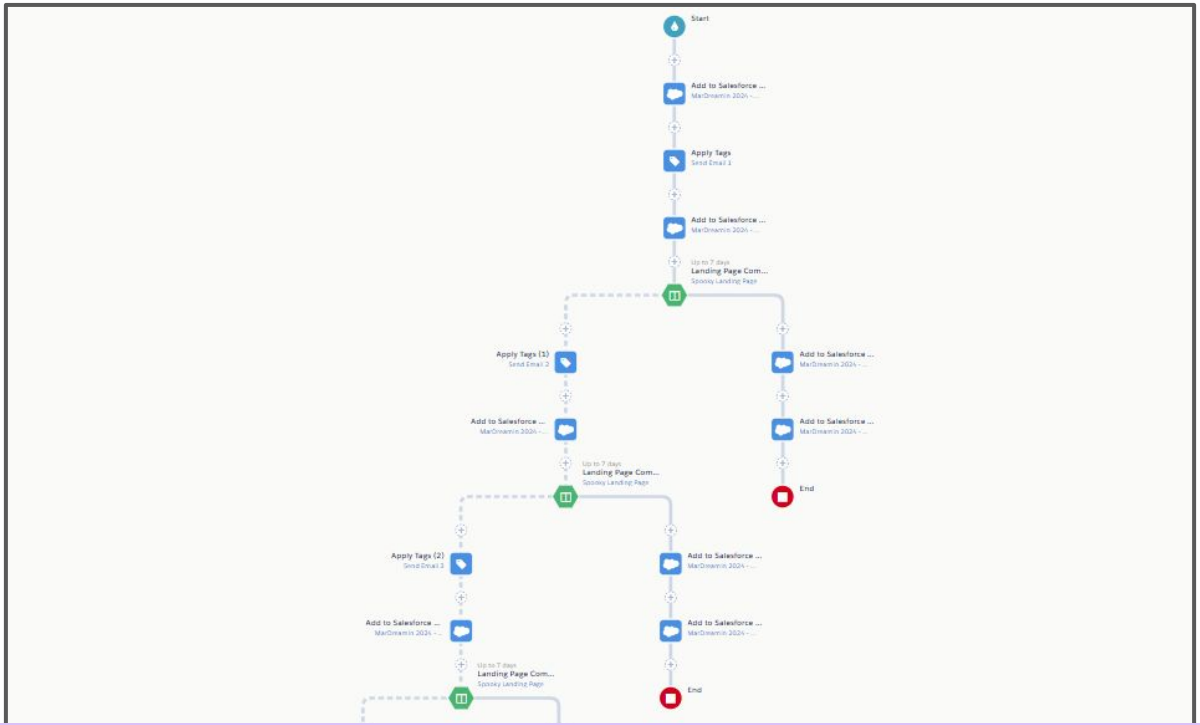
This style is perfect for singular processes or email series where Prospects need to receive all the emails. **Everyone gets processes the same way** (e.g. Sending emails updating your event registrants about an upcoming event).

Architecture Type - Chain



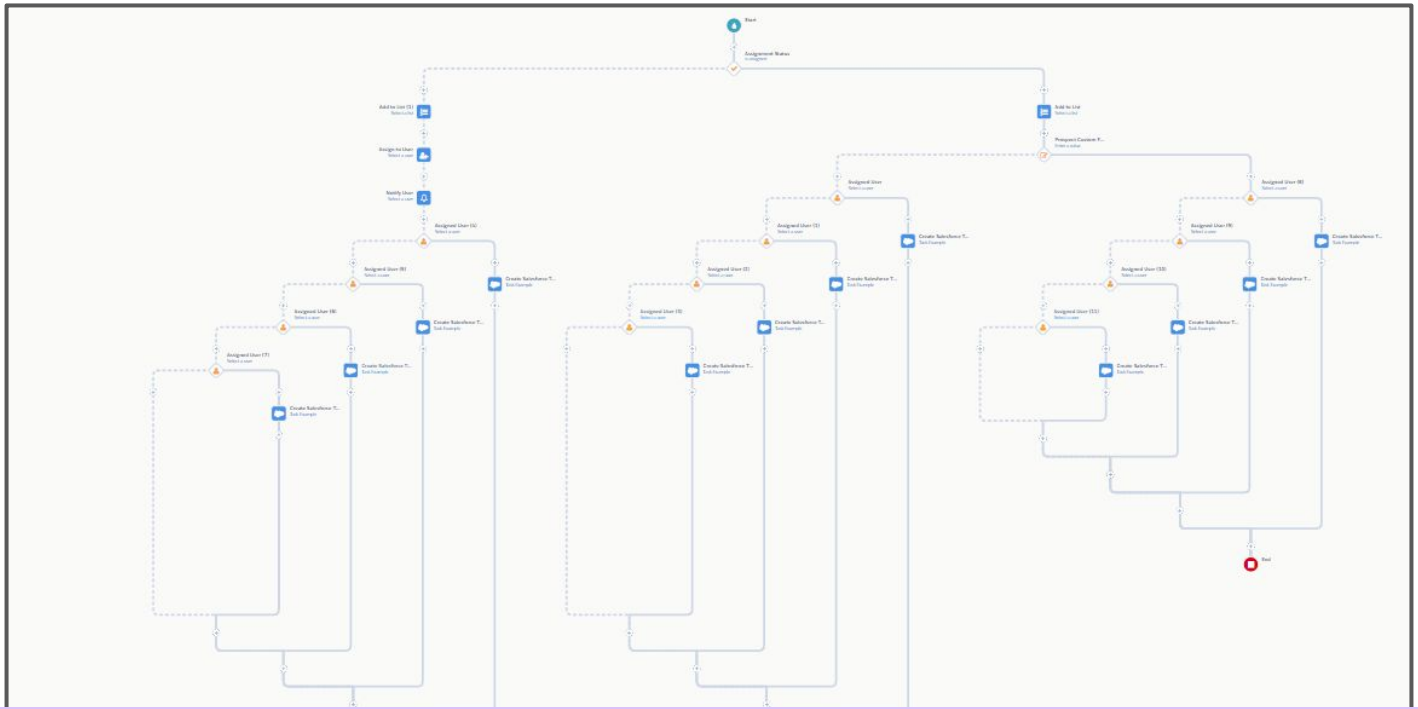
This style is perfect for evaluation processes that will **review all nodes but will only match against one** and/or if you need add more conditions later (e.g Send specific email if they like product A).

Architecture Type - Staircase



This style is perfect for when you need to check for conditions before moving to the next step or **when you are evaluating multiple values in order** (e.g. Send email two if they don't open email one)

Architecture Type - Waterfall



This style is perfect for **more complex logic where you often have to bucket** Prospects to then be able to process them individually (e.g. Add Prospects to a list based off region and then assign them to Sales in that region).

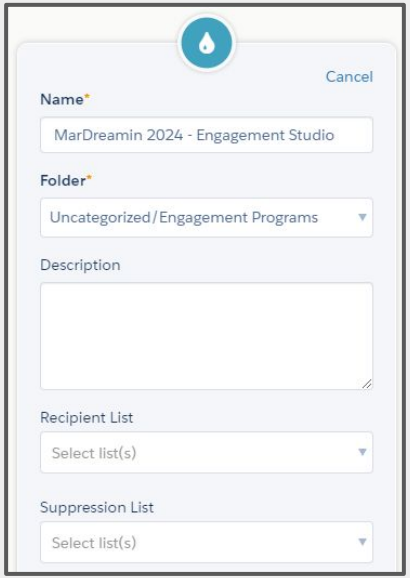
My Favorite Elements

Setup
- **Descriptions**
- Seed & Suppression lists
- **Copy steps**

Actions
- **Add to Salesforce Campaigns**
- Notify User
- Add Tags

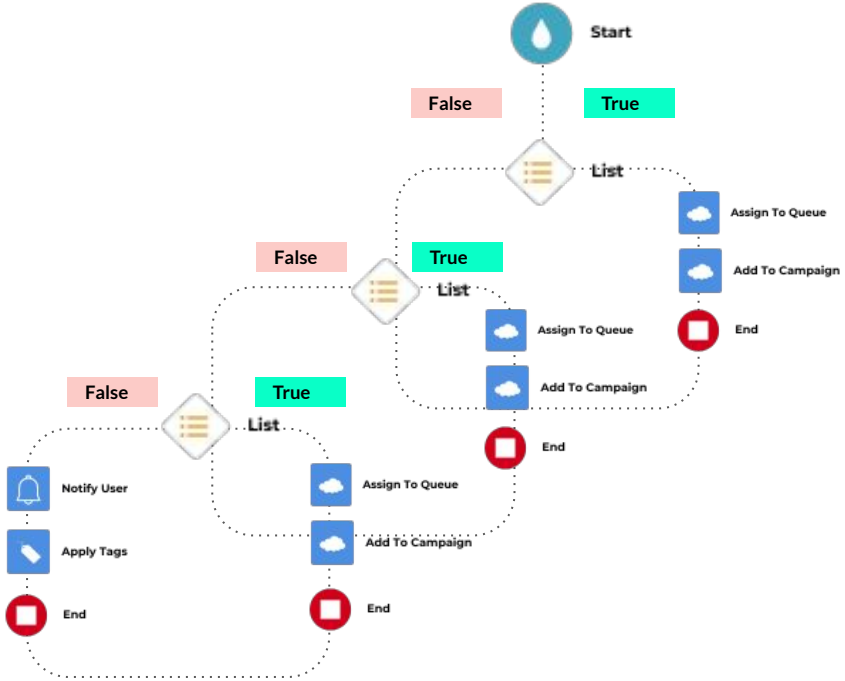
Triggers
- **Custom Redirects**

Rules
- **Lists**
- Assignment Status



Being mindful about both internal and external Users interacting with your journey is important.

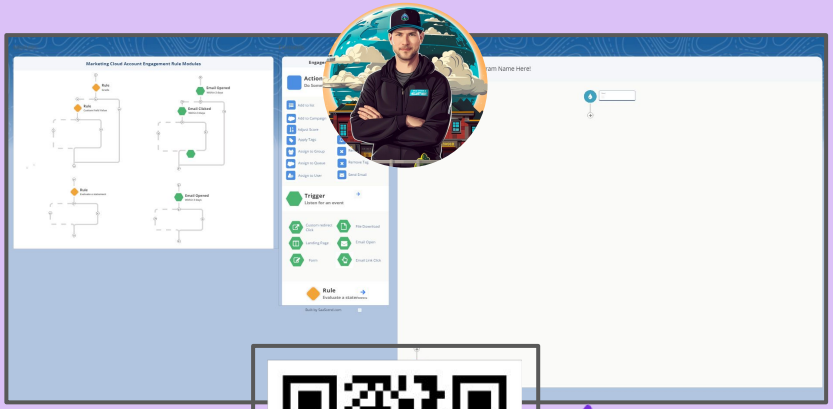
Put Them In Action



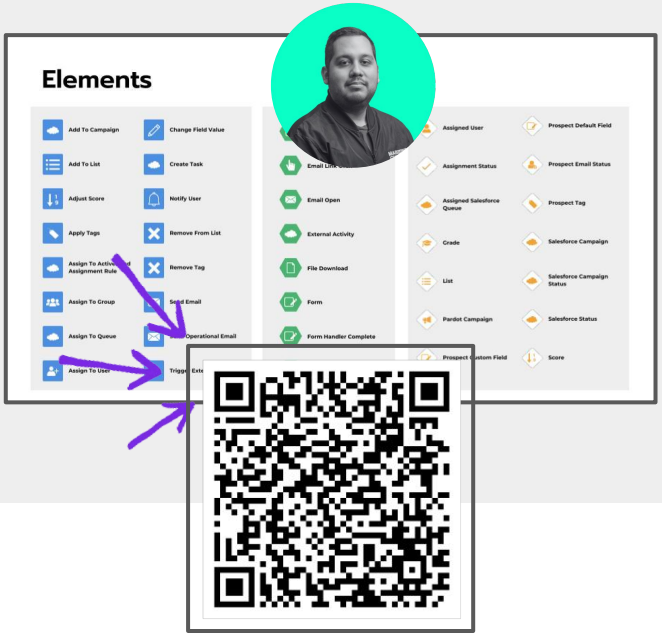
In this program we are checking for list membership (based on state) and then assigning to a specific queue for that Sales team and adding them to a Sales Follow Up Campaign. If we cannot assign them, then we will notify User and apply a tag before ending the program.

Build Your Own

Miro Template
Created by Stephen Stouffer



Google Slides Template
Created by Marcos Duran



Testing Your Journey

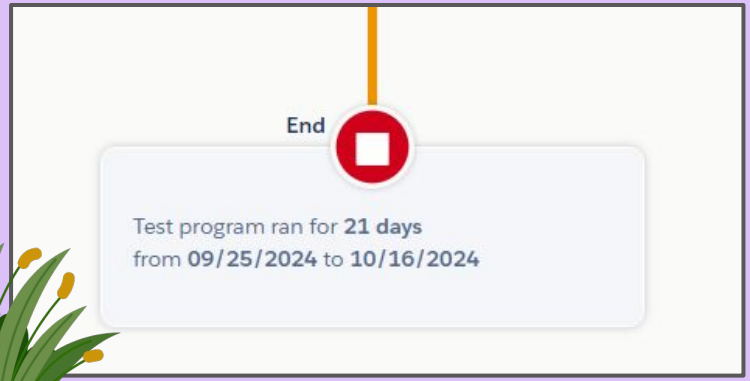
- Visualize how the Prospect will interact with this program
  - Form fill, email clicks, etc.
- Identify what data is needed to effectively test your program
  - **Always keep a Prospect with 0 data in your list**
  - Test different possibilities (e.g. ⅓ data points match, ⅔ data points match, and then all data points match)
- If you have an Salesforce centric steps, ensure data is syncing
- Review content for spelling, grammar, and correct links
- **Ensure all teams understand what happens when a Prospect does or doesn't do the intended action**
- **Review your metrics and be sure you are collecting the right data**

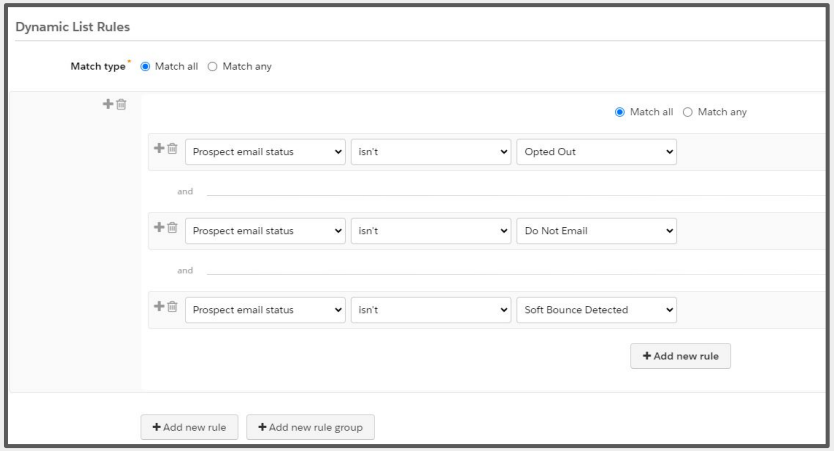
Optimizing Your Journeys

Optimizing Your Programs

Prepare For A Successful Program

- Omit unsubscribe and hard bounced prospects
- Understanding your journey's due date
- Understanding your source data





Optimizing Your Programs

Improve Your Processing Power

- Keep in mind the number of Prospects that will be processed
- Review the number of nodes
- Split journeys where it makes sense (e.g. evergreen or large volume)
- Take steps to consolidate paths and actions, you have a limit on active Engagement Studios

0

No Technical Limits But May Be Slow To Process

Recommendation: Split your Prospect's lists and add them in batches

300

Nodes Is The Technical Limit

Recommendation: Keep it under 250 nodes

20

Engagement Studio Programs In Growth Tier

Recommendation: Turn off or delete programs that are not active

Optimizing Your Programs

Keep In Mind These Features

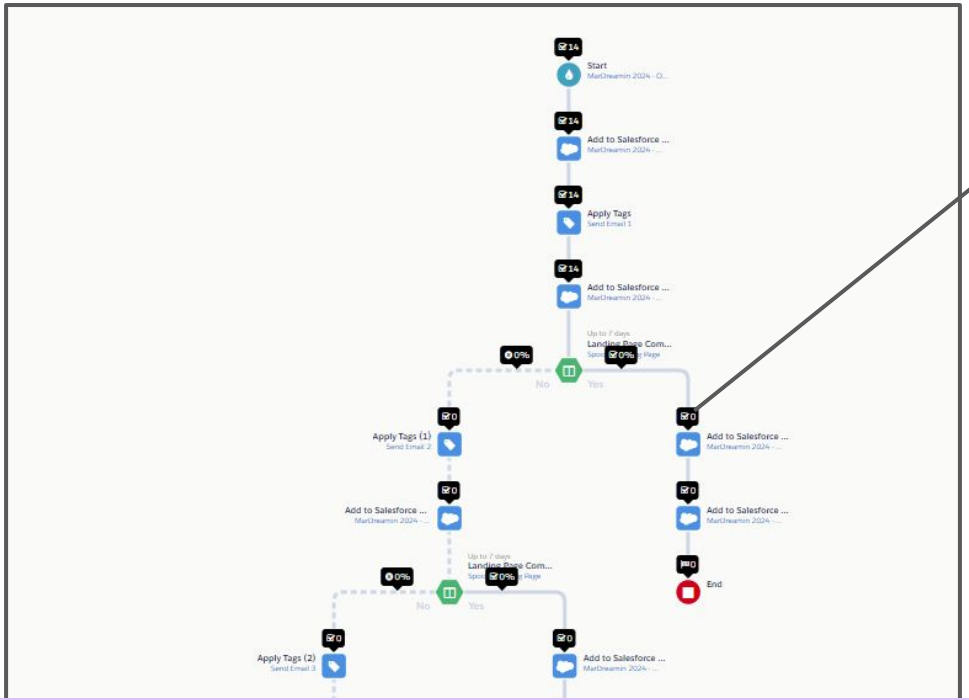
- Action: Add To Salesforce Campaign
  - Populating campaign members is the way to generate more reporting visibility in Salesforce
- Action: Apply Tag
  - Tags can be used as Account Engagement only triggers
  - Tags can be used to “skip” nodes
- Rule or Triggers: Wait Steps
  - Take advantage of the wait steps and review your logic
- Notes In The Activity Feed
  - Keep track of the changes to your programs
  - When you delete a node, you lose the data on who passed by it

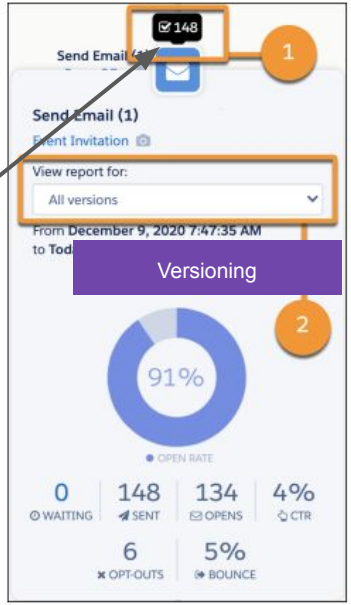
Gotcha's To Remember

- Dynamic lists will continue to feed your program
- When someone doesn't meet the criteria they are removed, if the criteria is met again they pick up where they left off
- **Duplicate and unmailable prospects can affect your programs**
- Business Hours will prevent emails sent but will not affect other node types
- Pausing a program will affect your wait steps
- **Turn off the program when not in use**

Reporting On Your Journeys

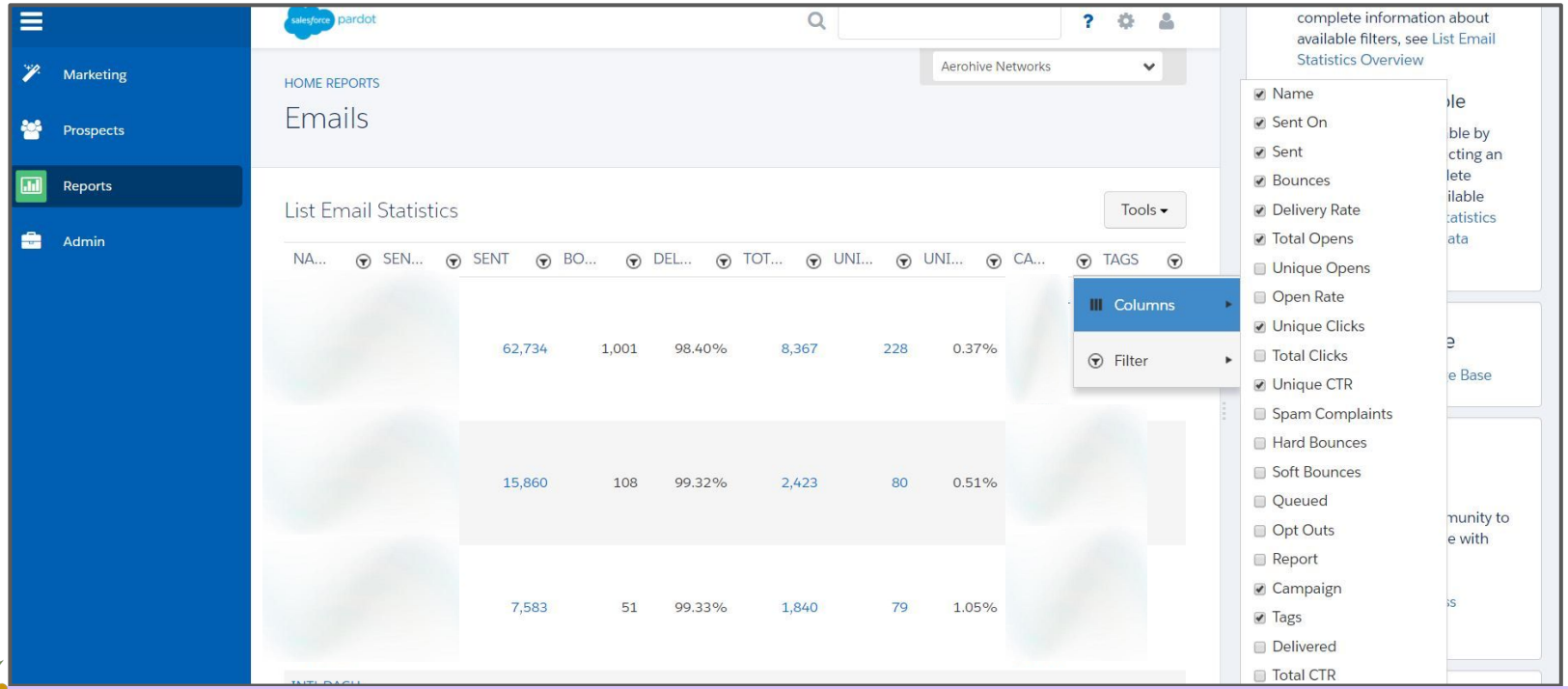
Engagement Program Reporting





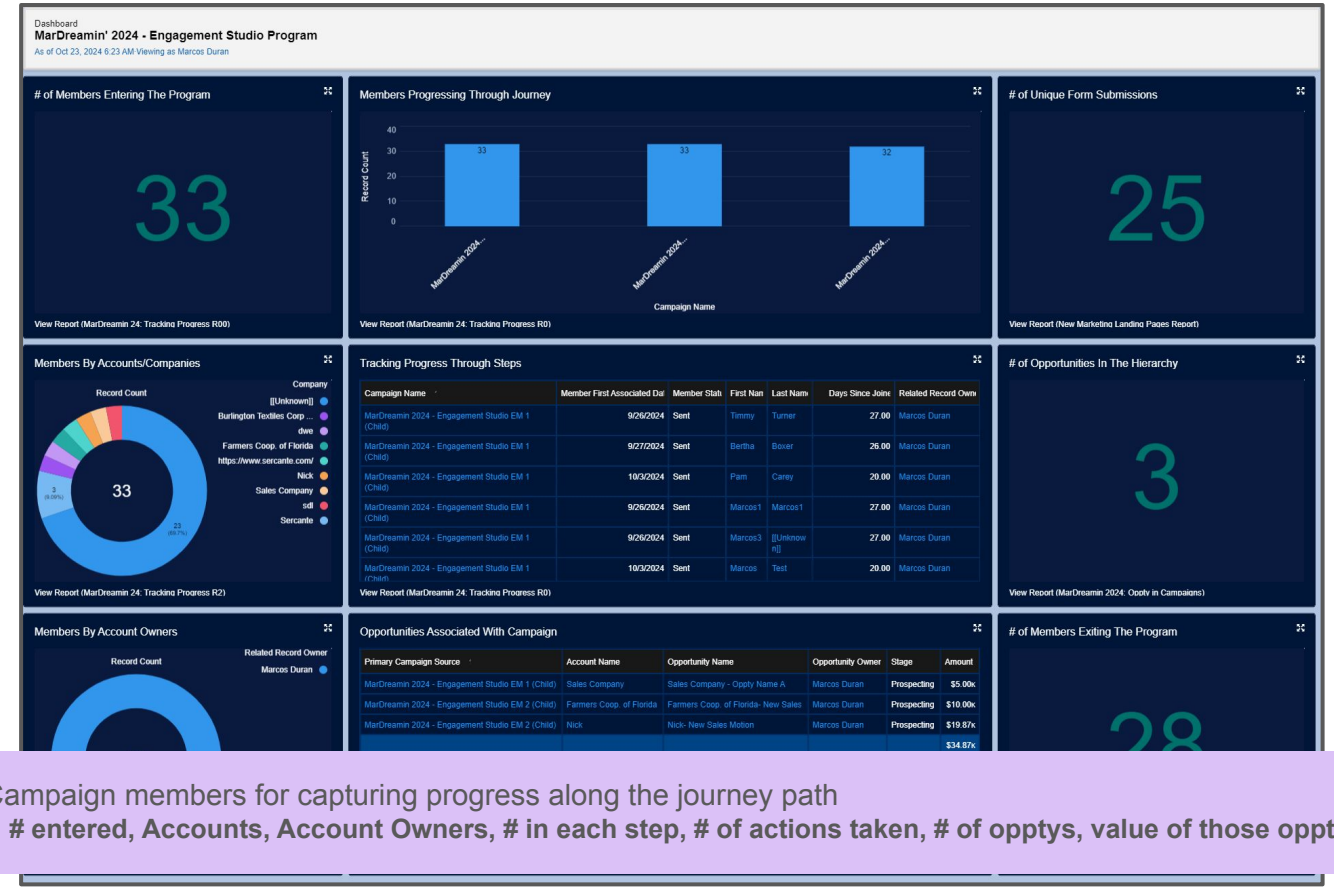
The Engagement Studio Program report will show a tooltip at each node, when pressed you can see additional metrics.

Email Template Reporting



You should see all email template reports here, even those from the Lightning Email Builder experience.

Salesforce Reporting



Using Campaign members for capturing progress along the journey path

Metrics: # entered, Accounts, Account Owners, # in each step, # of actions taken, # of opptys, value of those opptys, and # ended

Let’s Wrap Up

Main Takeaways

This presentation covered tips to build and/or improve your journeys with Engagement Studios. Think through your journey as if you were the recipient.

As you build your journeys, keep these (3) things in mind:

- **Plan ahead (and visualize it)**
  - Helps avoid misunderstandings, improves alignment, and creates stronger journeys
- **Keep it simple and document changes**
  - No one wants to Zoom 1000% or squint to see what you built
- **Make sure your data is where you need it and goes where you want it to go**
  - Ensures you can trigger correctly and report on your hard work

Thank You!

Thank You!

Marcos Duran

Fractional Salesforce & Marketing Automation Admin/Consultant @ Sercant...