

## **Understanding Email Journeys** <sup>[1]</sup>

September 4, 2024 by [lauren.galena](#) <sup>[2]</sup>

Email journeys deliver personalized and engaging communications to constituents using automation through the Journey Builder tool in Marketing Cloud. Journeys can be as complicated as a series of emails sent over a year with various decision splits to as simple as a single email sent once a year.

Focusing on the individual constituent experience — by sending emails to an audience based on defined triggers — allows you to deliver relevant and timely information encouraging engagement. For example, rather than manually sending an email to all alumni with birthdays in October on October 1, with Journey Builder, you can send a birthday email on the person's actual birthday (as long as their birthday is on their contact record).

### **Benefits of Email Journeys**

- Increase engagement (open rates and click-through rates)
- Save time and increase efficiency
- Reach the right audience, at the right time, with the right message
- A/B test with Path Optimizer
- Use Einstein's Send Time Optimization to deliver emails at the time constituents are more likely to open their messages

### **Salesforce Resources**

- [Best Practices for Your Email Marketing Design](#) <sup>[3]</sup>
- [Craft Effective Marketing Emails](#) <sup>[4]</sup>
- [Determine the Goal of Your Journey](#) <sup>[5]</sup>

### **Examples of Email Journeys**

- Alumni birthday email sent on a person's birthday
- New hire information and resources over the first 90 days
- Alumni volunteer opportunity information over 3 months for people who sign up to receive alumni news

- A welcome email when a constituent subscribes or opts-in to receive specific communications

## High-level Considerations When Brainstorming an Email Journey

- What is the business need, and how will a journey support the need?
- What is the goal of the journey and the related KPIs (metrics of success)?
- Who is the target audience?

## How to Get Started

- Recommended Path
  - Independent Path
1. Complete the [Journey Planning Worksheet](#) [6] to the best of your ability. This document will help you in the brainstorming process but don't worry about completing it in its entirety before submitting a ticket.
  2. Submit a help ticket [7], select Marketing Cloud, and then Journey Builder from the dropdown menu. Requests will be addressed in the order they are received. Include your Journey Planning Worksheet in your ticket submission.
  3. After submitting your ticket, we'll be in contact with you to schedule some time to talk about your email journey idea and outline the next steps.

### [Journey Planning Worksheet](#) [6]

If final details and content for all emails cannot be created before the launch, it's not worth setting up as a Journey. Instead, send emails out one by one and convert them into a Journey down the road, providing a great path for progress.

Interested in learning how to create Journeys? While it won't translate to eComm's data model and configuration, Salesforce Trailhead provides training:

- [Journey Builder](#) [8] [Basics](#) [9] | 30 min.
- [Quick Start: Create and Send a Message in Journey Builder](#) [10] | 20 min.
- [Journey Builder Campaigns](#) [11] | 40 min.

While not recommended, users are welcome to explore Journeys in Marketing Cloud on their own. Journeys intended for launch must be created in the parent Business Unit (University of Colorado System Enterprise Org) since synchronized Data Extensions are configured there. No other business units have synchronized Data Extensions, so only create Journeys in other Business Units if you are 'playing' and do not intend to launch it.

## Why isn't this path recommended?

- To put it simply, Journeys are hard to execute - from planning, testing, launching, and troubleshooting. They require an understanding of how Journey Builder technically operates and a much deeper understanding of eComm Salesforce data.
- Many use cases are not easy to execute in Journey Builder. For example, a series of emails that will be used once is easier to send as individual emails. To justify the work it takes to launch a Journey, the use case should be scalable.
  - Many use cases rely on data that is not available in Salesforce eComm. While you can import external data to a Data Extension, it makes for a 'manual' Journey which is more labor-intensive than individual email sends.

## Who has access?

- All eComm Specialists have access to Journey Builder and the parent Business Unit (University of Colorado System Enterprise Org).
- Other users do not have access to Journey Builder but are welcome to ask for access by submitting a help ticket [7].

## Get started

- eComm Data
  - Data & Tool Model [12]
  - Salesforce Reporting [13]
- Journey Builder
  - Journey Builder [8] Basics [9] | 30 min.
  - Quick Start: Create and Send a Message in Journey Builder [10] | 20 min.
  - Journey Builder Campaigns [11] | 40 min.

## Related Content

- [UCCS Alumni Association Optimizes Birthday Emails With Journey Builder](#) [14]
- [Dynamic Content](#) [15]
- [Marketing Cloud | Einstein Overview](#) [16]

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