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Understanding Email Journeys in Marketing Cloud [1]

October 20, 2023 by Melanie Jones [2]

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 [3]
- Craft Effective Marketing Emails [4]
- Determine the Goal of Your Journey [5]

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

Populate the Journey Planning Worksheet [6] to help you in the brainstorming process, which includes a mapping exercise (within a Google Sheet).

Journey Planning Worksheet [6]

Supported Users

Supported users can submit a ticket [7] before or after filling out the worksheet. After submitting your ticket, we'll be in contact with you to schedule a time to talk about your email journey idea and outline the next steps.

Autonomous Users

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

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

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[7] https://www.cu.edu/crm/forms/integrated-online-services-ios-help-ticket
[8] https://trailhead.salesforce.com/content/learn/modules/journey-builder-basics/get-started-with-journey-builder

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