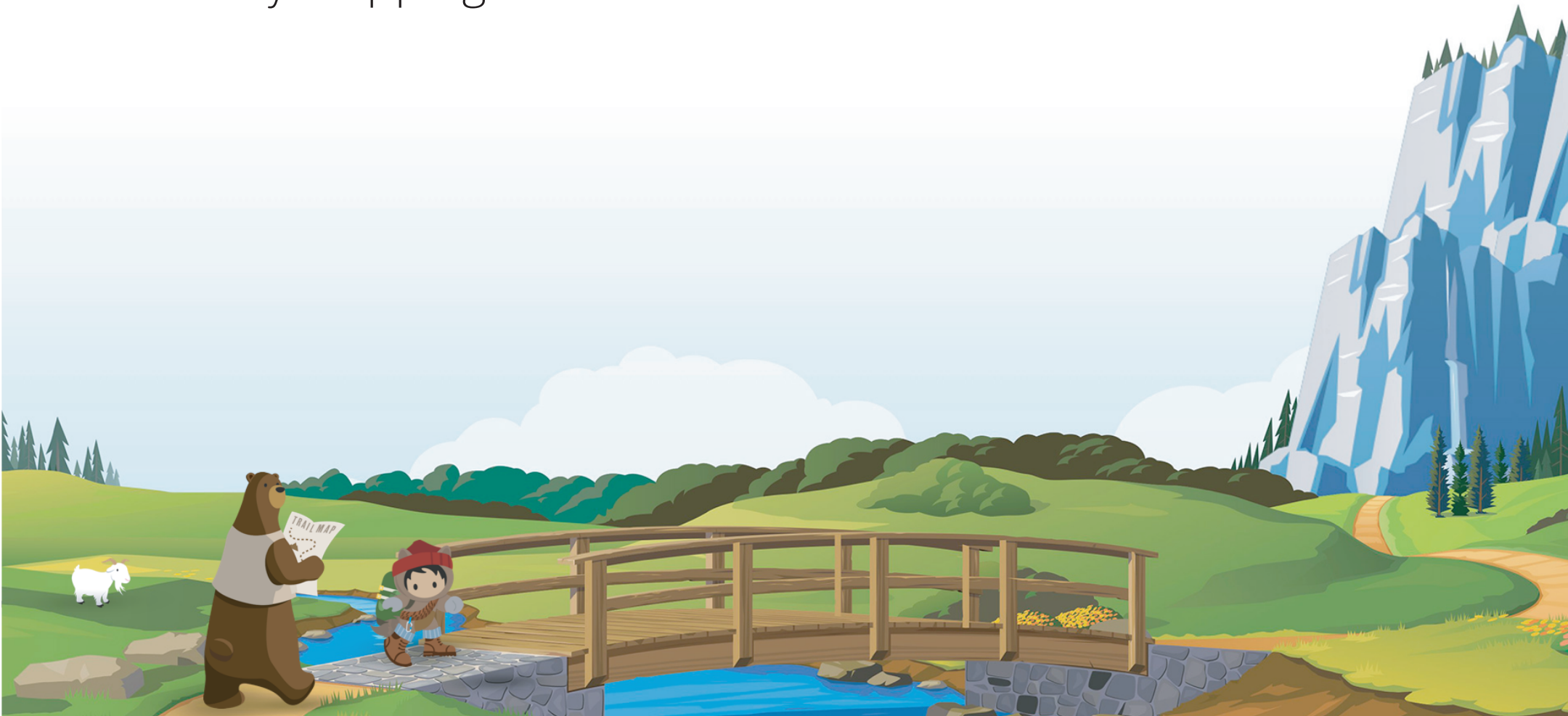




Getting Started with Customer Journeys

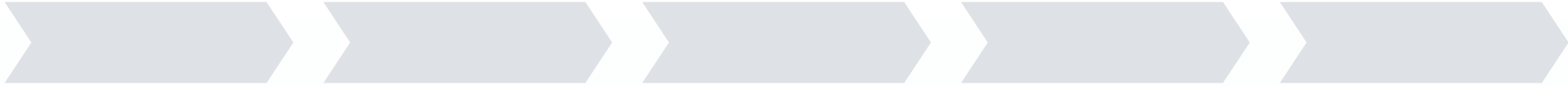
Journey Mapping Workbook



LIFECYCLE



LIFECYCLE STAGES



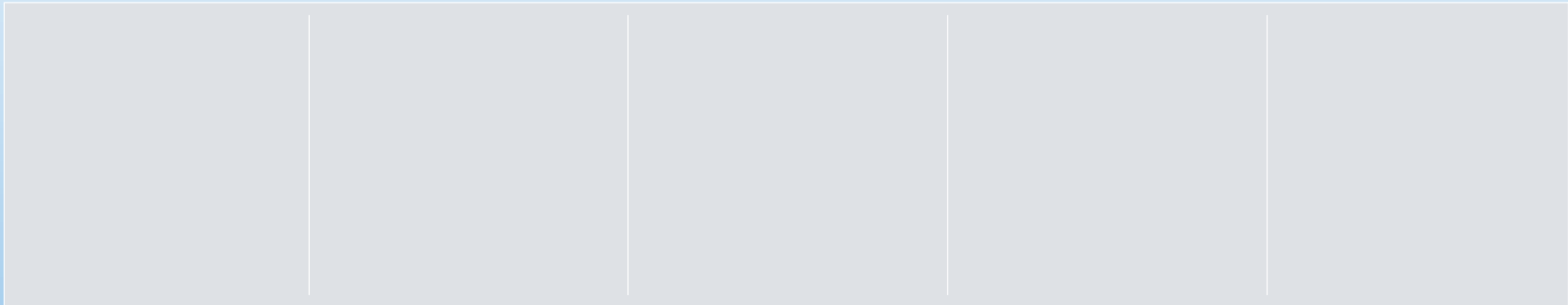
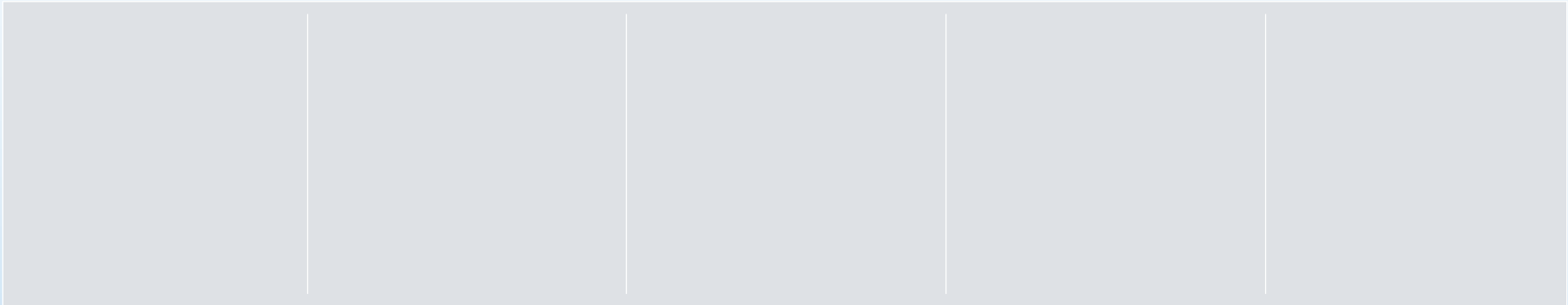
GOING WELL

DO BETTER

MOMENTS THAT MATTER

GOALS

INITIAL GOALS



AUDIENCE FOR JOURNEY _____

DATA NEEDS _____

AUDIENCE	CURRENT DATA	WHAT DO YOU STILL NEED/WANT?

SMART GOAL _____



CURRENT CHANNELS

CURRENT CONTENT

FUTURE CHANNELS

FUTURE CONTENT

Icon Definitions

	Audience	List of Contacts		Ad Audiences	Send display ad to social media platforms or websites etc.		Join	Merge contact back into main journey stream after completing an action
	Contact Event	Customer purchases, signs up for newsletter, downloads a white paper, registers for an event		Decision Split	Yes or no qualification, based on on a value of an attribute in the contact's data		Case	Create a service case in service cloud for follow up
	Date-Based Event	Contact enters a Journey based on a date (i.e. birthday, subscription expiration, purchase date)		Random Split	Used for testing messaging and delivery vehicles (i.e. email vs text)		Lead	Create a lead in Sales Cloud for sales person follow up
	Send Email	Send email		Engagement Split	Specific to an email whether it was opened or not, bounced or not, or whether a specific link was clicked on or not		Task	Create a task in Sales Cloud for sales person follow up (i.e. call, send email, schedule demo, etc.)
	Send SMS	Send text		Wait	Hold for a certain amount of time (i.e. 1 hour, 1 day, 2 weeks)			
	Send Push	Send notification to mobile app						