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Journey builder: A core feature of Marketing Cloud

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Abstract

Salesforce Marketing Cloud (SFMC) is an effective digital marketing platform designed to streamline and automate marketing efforts in various areas such as social media channels, SMS text messages, email, mobile apps, and websites. SFMC enables organizations to manage customer

interactions in one centralized system while sending personalized messages directly to targeted audiences at the right time and place. This guide highlights Journey Builder features.

Keywords: Salesforce, marketing cloud, journey builder, abandoned cart, survey journey, customer journey

Introduction

Salesforce Marketing Cloud is an effective marketing software for building and executing successful marketing campaigns while cultivating customer relationships.

As a SaaS platform, marketers can use email personalization tools such as segmentation to plan, segment, and optimize various facets of marketing such as customer journeys, multichannel campaign execution, pre-and post-campaign analytics, social media promotions & engagement, and data management platforms.

Customers hold the power in modern marketing environments. Salesforce Marketing gives marketers endless ways to understand customers' wants and needs while offering them what they desire.

The platform facilitates

- Customer engagement in real time (real-time engagement)
- Email and Marketing Automation
- Social Media Engagement Automation

Salesforce Marketing Cloud's comprehensive suite of tools and features enables companies to discover and understand customers more deeply on a personal level and then market directly to them via email, social media marketing, e-commerce platforms, and mobile advertising. Marketing Cloud allows organizations to customize content specifically for every customer - creating tailored experiences and cultivating one-to-one relationships between themselves and each customer.

Journey Builder

Journey Builder is Marketing Cloud Engagement's premier campaign planning and execution tool, giving marketers everything they need to create campaigns that engage customers throughout their interactions with your brand.

Journey Builder allows marketing team to design and automate campaigns that lead them through multiple interactions with the brand - such as an event series.

- **Multichannel:** Your company's communications must seamlessly span email, SMS, push notifications, ads, landing pages, and apps so customers receive relevant information at exactly the right time and place.

- **Responsive:** Tailoring customer journeys based on real-time events such as purchases, mobile app downloads, email reading, or closed service cases.
- **Adaptive:** Continuously adapting customers' paths according to current or predicted behavior.

Journey Builder's cornerstone is customer journey mapping - which is defined as the series of steps your customers go through when engaging with your organization, be it clicking an ad, reading an email, making a purchase or return in-store, talking with the service agent on the phone, downloading a whitepaper or redeeming coupons.

If you haven't experienced Journey Builder yet, take some time to discover more about connected customers, personalized journey strategies and general journey strategies by reviewing the Customer Journey Basics in this module.

Determine Roles and Permissions

To set permissions, let's first review our general account settings.

There are two forms of access: roles and permissions.

Roles for Marketing Cloud Engagement users depend on their type and the tasks they will complete, such as importing data, assigning permissions to users, or deleting events or contacts. Marketing Cloud Engagement administrators can assign these roles to either an individual user or to an entire business unit.

Marketing Cloud Engagement includes several standard user roles

- Administrator
- Analyst Content Creator
- Content Editor
- Data Manager
- Distributed Sender
- Marketing Cloud Engagement Administrator
- Channel Manager.

Marketing Cloud Engagement Content Editor/Publisher and Security Administrator

These permissions allow you to manage user access based on Marketing Cloud Engagement applications, which are assigned by assigning settings at an application level.

For example, if your creative team operates independently from digital marketing teams, Content Builder could give them access but not Contact Builder or vice versa.

Permissions can also be set in various other areas within Marketing Cloud Engage as needed (for instance, Contact Builder users could have no access).

Marketing Cloud Engage Viewer

This Permission can be set in below ways:

1. **Allow:** User has access to an application or functionality. Deny: No access allowed for the user in question. Not Set: Permission for this app/feature has not been explicitly granted nor denied but defaults to Deny for Journey Builder Permission choices such as these.
2. **General Access, View:** Journey Builder will be viewable when granted, and Automation Create and Edit will be denied. When both permissions are enabled simultaneously, however, Automation Create, Edit allows journey creation, editing, and publication.

Enhance Your Journeys

Since you are here exploring advanced customer journeys, chances are you have already created at least one simple journey or two using Journey Builder. Maybe to welcome new customers, reengage existing subscribers, or wish someone a happy birthday - these basic journeys only scratch the surface of all that Journey Builder can do.

Imagine multichannel programs responding and adapting to customer behavior! So, hang tight as we step beyond basic Journey Builder capabilities to deliver outstanding experiences for customers!

1. Set Your Goal

Before setting out on any journey, it is necessary to set an initial destination or goal. Simply put, this means identifying what it is you wish to achieve: new customers, higher renewal rate or increased website conversions? From here, use SMART principles to refine and tailor this goal more precisely.

- Your goal should be clear and specific: It should also be measurable so you can assign numbers or checkpoints for achievement of it, achievable within your means, relevant, and applicable to your work environment.
- Time-based: You can set a specific timeline to reach your goal.

2. Select Your Channels

Your goal should be to create an enjoyable journey for every customer, so knowing how and when you communicate is equally as essential as what. Customers respond better in different channels depending on the circumstances surrounding each situation.

- Email messages offer customers a low-pressure communication channel they can come back to again and again, but customers can easily unsubscribe (or worse - just stop opening them altogether) from your messages.
- Text messages require immediate attention, making them ideal for urgent situations or specific touchpoints; however, sending too many SMS can quickly lead to unsubscribes and negative associations with your brand.
- Push messages allow your app to target specific customers directly, yet this method can become problematic if used too frequently or targeted incorrectly.

3. Establish Key Moments

Every customer is an individual with their own individual journey through your brand's offerings; however, marketers generally agree that customers progress through five distinct phases, making up what marketers refer to as the five-point customer lifecycle.

- **Acquire** - Your customer is making their initial decisions regarding whether to engage with your brand or product.
- **Onboard** - Once engaged, customers require information to maximize the opportunity.
- **Engage** - They require more knowledge or guidance in using your product effectively.
- Retain customers by giving them incentives to stay with your product.
- **Advocate** - Customers go beyond simply using it themselves and convince others to join.

Once your customer arrives at your brand, their journey doesn't stop there. Engaging them on an ongoing basis requires ongoing engagement efforts which you will learn here. Once complete, you will possess all of the tools needed to keep customers interested and active with your brand.

Happy Birthday Campaign:

Let's examine a time-honored birthday engagement campaign: it works, and it's simple.

Every journey should have one clear objective: sending your subscribers a free treat or offer on their birthday keeps your brand top-of-mind year after year and will bring good karma, too.

Let's say Micheal is helping a coffee shop client launch a birthday engagement campaign; who wouldn't love free coffee on their special day?! He adapts an email template specifically for the client. Michael had previously helped this client build an excellent data model as part of another project; therefore, he uses an existing data extension with all the following data for kick-off:

- **Birthday**

[First and Last name, email, coupon code, Redemption flag, and Mobile number (if available)]

- **Downloaded app**

In its initial form, this journey sends out a birthday email (including an offer of free small coffee) at the beginning of every month for all customers with birthdays in that month. This campaign received a great response but also resulted in an enormous spike in traffic on the first day of every month. To reduce worker burden and spread out this offer more evenly over time, Michael uses an event to check birthday values 14 days into the future and sends customers who redeem a coupon code an email containing an offer code for a free small coffee!

Once on their birthday, they'll also get a follow-up message from them congratulating them and reminding them about it. Take the time to test and modify as you work so you are meeting each customer at their ideal points in their journey.

Build Effective Welcome Campaigns

Journey Builder can reach across Marketing Cloud Engagement apps to capture information and engage your customers, while this unit explores how Cloud Pages serve as the basis of data collection efforts, with additional strategies on creating opt-in and welcome campaigns using these tools. Cloud Pages makes providing web content for Marketing Cloud Engagement campaigns simple and effective. This app includes tools you can use to easily build landing pages, microsites, and Mobile Push pages that appear when customers click the links in your messages.

Let us assume that you are an administrator with permission to create and test journeys within Marketing Cloud Engagement.

In the next step, either a private domain purchased directly by yourself, or one provided by Marketing Cloud Engagement may be utilized, which depends upon your needs.

If you aren't an administrator for Marketing Cloud Engagement, that's fine - read along to understand how they would take steps in a production organization.

Let's look at how Cloud Pages can be utilized as part of an opt-in campaign. Meet Micheal Chan, marketing manager of "Atom Cloud Consulting" who's working with an IT services client that wants to increase subscribers to their monthly newsletter using Cloud Pages and a Smart Capture form to

collect opt-ins. Chan and her client have agreed on an opt-in goal of 1,000 new subscribers within 9 months with five pieces of content being produced using this plan.

- An engaging landing page and data extension to capture subscriber data.
- An email confirmation message, A secondary confirmation message, and coupon codes as incentives

Effective Marketing Campaigns

Customers' needs and behaviors are shifting rapidly, as more of them expect digital experiences across all their brand interactions - and ecommerce continues to experience staggering growth.

As the digital landscape continues to develop, companies are increasingly shifting their operations online in order to connect with customers. However, connecting effectively online requires much more than simply setting up a storefront; brands must adapt all elements of their marketing process accordingly to ensure they are fulfilling customers' needs and expectations for digital-only interactions.

What exactly does this transformation involve? In order to engage customers effectively, marketers are charged with several tasks in order to attract their business:

- Developing strategies for connecting with customers across various channels -- email, social platforms, and mobile apps-- in order to maintain relationships.
- Optimizing customer touchpoints and experiences throughout their customer journey using data-driven insights.
- Achieve all this efficiently within budget while meeting business goals. Marketers can help make this transformation successful by optimizing their marketing campaigns.

Here are four tactics marketers can utilize to optimize messages that create big impacts - and provide substantial rewards.

- **Channel:** Marketers must always strive to improvise their campaigns across various channels such as internet search, social media channels, display advertising and TV in order to deliver the message effectively. By viewing all campaigns and channels in one place - complete with KPIs and insights - it becomes much simpler for marketers to identify which campaigns to prioritize over others and which should be put on pause.
- **Audience:** Customers expect brands to understand them and deliver customized experiences along their buying journey, so marketers need to know when and how to activate relevant messages for specific audiences at key moments in time. In doing this, marketers can gain insights into which content, creativity, and keywords impact business results and the customer experience in real time.
- **Web and Social:** Web and social optimization is designed to combine marketing efforts with media influences (news articles, social media). Customer research on brands is made much simpler through websites, SEO and social media; marketers should look for opportunities to connect these channels, so they gain a holistic view of how paid and organic programs interact, promote the most successful content while improving campaigns to gain quality traffic.
- **Public Relations:** Public relations and social buzz can

help build customer loyalty to brands and products. Utilizing data to measure return on investment (ROI), marketers can use insights gained to shape marketing initiatives as well as the business overall - providing answers to many pertinent questions along the way.

Abandoned Cart

Imagine If People Abandoned Carts Can you imagine if people abandoned their shopping carts as frequently in real life as they do online?

According to Salesforce research, people abandon up to 69% of online carts they begin. If so many carts were left lingering in store aisles, you'd never make your way through.

While online stores don't face physical carts as an obstacle to their customers completing purchases, they must address what stands in their way to ensure customers can complete a sale successfully. Simply put, behavioral triggers remind shoppers they left something behind and give them a reason to return and retrieve it.

Gather Customer Feedback with a Survey Journey

Journey Builder allows you to connect with your customer at various points throughout their lifecycle; but why stop there? With Salesforce Sales Cloud and Service Cloud integration capabilities, this unit allows you to address every stage of customer interactions that may arise during their customer journey.

Journey Builder leverages the Salesforce SOAP API to execute three actions within Sales Cloud and Service Cloud:

- **Create**--This activity creates new objects within either Sales Cloud or Service Cloud.
- **Find and Update**--This action uses an Account ID value to find the relevant record and update any attributes necessary.
- **Simple Update**--This activity updates information on a specified Account object. Despite what some may believe, no code needs to be written for these actions to take place; simply move an activity onto your Journey Builder canvas for these examples to take effect.

1. Create leads when Marketing Cloud Engagement contacts begin their journeys.
2. Update leads based on engagement within each journey. Produce CRM contact records when Marketing Cloud Engagement contacts reach an activity. Enhance existing CRM contact records with Marketing Cloud Engagement contact data.
3. Enhance custom objects according to engagement within journeys. Create tasks when an additional object, like leads or contacts enter journeys. Associate cases or tasks with accounts. Update tasks based on response by contacts or leads in journeys.
4. Update an individual or business account.

Marketing Cloud Engagement captures an abundance of data about customer demographics and behavior, so use it to your advantage! Utilizing this insight along with open, clicks, and forwards data from email messages enables you to craft more effective journeys.

Testing allows you to discover which messages work better, which is why more advanced journeys include random splits for message testing.

Conclusion

Journey Builder is an integral component of the Salesforce Marketing Cloud Engagement tool. At its heart is customer journey mapping; that is, mapping each step along their customer experience in considering, purchasing, using and remaining loyal to a brand. Journey Builder facilitates personalized customer journeys while simultaneously creating effective campaigns and content to increase customer experiences and strengthen loyalty ties between brands and consumers.

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