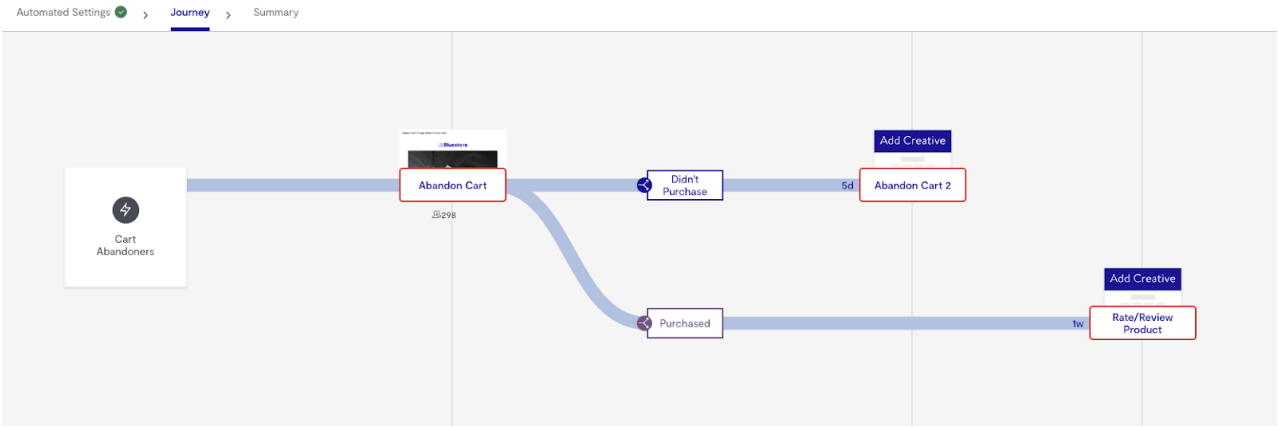
How to use Experience Designer

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Experience Designer is a way to create tailored multi-touch journeys that customers flow through from beginning to end. With Experience Designer you can create visual ties between campaigns on a timeline, linking them together so you can follow along with a customer's journey.

For example, you can create an abandoned cart campaign that targets customers who add an item to their cart and leave without purchasing. You can then add a journey so that customers who interact with the abandoned cart campaign and purchase the item will then receive a campaign asking them to rate and review the product, and customers who did not purchase the item after the abandoned cart campaign will receive a reminder about the item in their cart.



When to use Experience Designer vs standalone campaigns

There's nothing you can do in Experience Design that you can't do by creating individual campaigns, but depending on how you use the campaign, it may make sense to use one over the other.

Initial Setup and Configuration

	Experience Designer	Standalone Campaigns
Visual Ease	You can follow along with a customer's journey, starting with an initial audience and watching how they could move from campaign to campaign.	There's no way to visually link connected campaigns together when building them separately.
Holdouts	Holdout groups are created for entire journeys, not individual campaigns.	Holdout groups can be different for individual campaigns.
Number of campaigns	Do not create more than 10 touches in one journey. Exceeding 10 touches in a single journey can negatively impact website load times, and may cause the journey to fail to launch.	Unlimited number of campaigns.

	Experience Designer	Standalone Campaigns
Auditing campaigns	Journeys can be harder to audit –each touch encompasses the initial audience, plus any filters that have been added to subsequent touches, so it can be harder to keep track of additional touches.	If you build campaigns independently, each campaign has its own audience that can be observed and analyzed.

Updating a Campaign or Journey

	Experience Designer	Standalone Campaigns
Editing audiences	Do not use Experience Designer if you plan on editing your audience later. If you update an audience used in a journey, republish the journey. If you don't republish the journey, it will not reflect the new audience.	Audiences can be freely edited, updating the campaigns they correspond to.
Flexibility	Journeys can't be converted back to standalone campaigns.	You can convert a created standalone campaign into a journey, but you can never revert a journey back into a standalone campaign.
'OR' conditions in audiences	Do not use Experience Designer if your journey will use an 'OR' condition in the input audience for the journey. Using an OR statement in an audience with Experience Designer will cause the last piece of criteria to not be considered, meaning the pool of eligible customers will be smaller than what it should be.	If you want to use an OR statement in your audience, create the campaigns independently.
Resuming a paused journey	Pausing and unpausing a journey will send the campaign to every customer who qualified for the paused touches. Also, the time you unpause the journey becomes the new send time. For example, if the campaign normally goes out at 1 p.m., and you unpause at 9 p.m., the new send time will be 9 p.m.	If you plan on pausing and unpausing a campaign, build your campaigns separately.

How to create a journey

Creating a New Journey

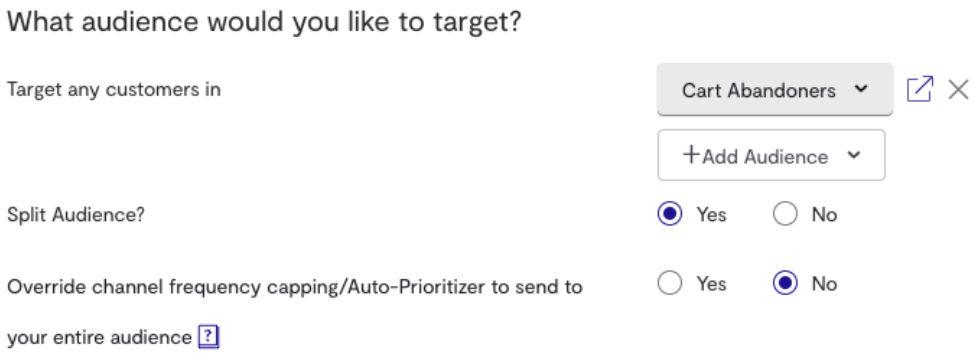
To create a journey in Experience Designer, complete the following:

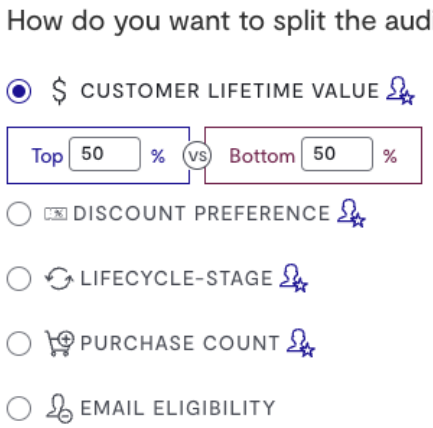
1. Navigate to **Campaigns** and select **Automated Campaigns** or **One-Time Campaigns**, depending on the type of campaign you want to create. The list of Communicate Campaigns displays.

2. Select **New**, then **Campaign** and the channel - either Email, SMS/MMS, or Audience Export - Email.

> ⓘ Experience Designer is only possible with email campaigns - not text.

3. Create your campaign with your intended settings and audience.
4. If you want to split your audience, select your audience and select **Yes** for **Split Audience?**, where some options for splitting will appear below the section.





> ⓘ You can't exclude audiences when using Experience Designer.

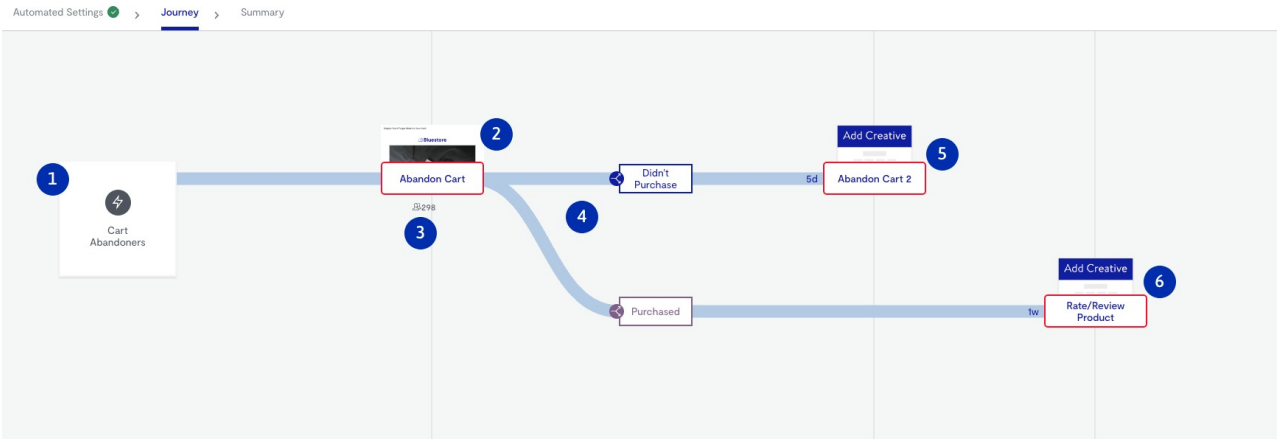
5. If you choose to split your audience, you'll be taken to Experience Designer to start making your journey when you select **Save and Continue**. If you don't, you'll be taken to the **Message** step when you select **Save and Continue**.
6. On the Message step, select the light blue **Create Journey** button at the bottom right to be taken to the Experience Designer.

Converting a Campaign into a Journey

1. Navigate to **Campaigns** > **Automated Campaigns** or **One-Time Campaigns**, depending on the type of campaign you want to turn into a journey. The list of campaigns displays.
2. Select the campaign you want to turn into a Journey with Experience Designer and open it.
3. Select the blue **Create Draft to Edit Campaign** button in the top right, then confirm in the following pop-up window.
4. When the draft is created, select **Edit Draft** in the same spot. You'll be taken to the summary page of the campaign.
5. Select **Message** at the top of the window to move to the message tab of the campaign, then Select the light blue **Create Journey** button at the bottom right to be taken to the Experience Designer.

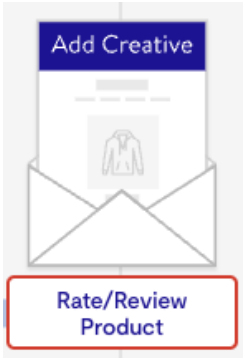
Navigating Experience Designer

This a visual introduction to Experience Designer, defining the actions and elements within the journey.



1. This is your initial audience that starts the journey.
2. This is the first touch. Everybody who meets the qualifications of the initial audience will receive this campaign.
3. The icon with people and a number is the estimated size of the initial audience.
4. This is an audience split, which allows you to create new paths for customers to move through the journey.
5. This is a second touch, with incomplete creative settings, set to trigger five days after the first touch.
6. This is a third touch, connected via the split, set to trigger one week after the first touch.

On each touch, you can add a creative or edit the campaign by selecting the envelope icon.



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When you hover over a touch, you'll find the following settings:

Debug Touch allows you to audit the touch, using SQL and viewing the properties of the segments, journey, and trigger. This is used by Bluecore's engineering team.

Edit Timing allows you to adjust when - and how often - this touch will run. Remember, a touch is the same as a campaign in this instance. You can set the touch to repeat by hours, days, weeks, or months.

Edit Filter narrows the customers who receive this touch. Because everything starts with the audience on the left, you can't add back any customers you removed from the initial audience.

For example, if your audience is only targeting users who added something to their cart one to two days ago, you can't use the audience filter to include customers who added an item to their cart a week ago.

Once building your initial audience, the filters can only make that audience smaller, not larger.

Edit Channel adjusts the channel of the campaign, depending on what type of touch it is. If it's an email campaign, you can change between using Bluecore or Salesforce Marketing Cloud to send it. If you're exporting the audience for your own ads, you can choose what program it uses to export, such as Urban Airship or Attentive.

Add Touch creates a new touch directly connected to the current one. You can adjust the new touch's timing and filter settings before creating it.

ⓘ Keep the number of touches within a single journey at or below 10.

Split Audience creates new paths for customers to move through the journey after the current touch, using the audience creation options.

Delete Touch removes this touch from your current journey, keeping future touches intact.

⚠ Deleting touches is permanent - be sure you want the touch deleted before confirming.

When you're done adding touches, select **Save & Continue** on the bottom right to get to the summary screen, where you can see details for each touch.

Launch the journey by selecting **Save & Launch Campaign** on the bottom right.

After your journey is launched, you can monitor its progress by selecting it on the campaigns page. You'll be able to review the structure, view the summaries of all campaigns included, and see performance analytics.

Analytics

In addition to viewing each journey's analytics on the campaign summary page, you can also view a journey's analytics segmented by touch on the Email Analytics page.

To view, hover over the Analytics icon and select **Email**.

A list of campaigns will appear, with their analytics. Each journey will be grouped together, so you can see the journey's analytics, along with each touch.

If your touches are distinctly named, you can follow along with a customer's path through the journey, potentially seeing where they dropped off or what specific touches are performing well.

Additional Information about Experience Designer

Global frequency capping

With Experience Designer, global frequency capping is only applied to the first touch, not any subsequent touches. This means a customer will receive the first touch only if they are eligible due to frequency capping, but if they do receive it, they'll get all subsequent touches regardless of frequency cap settings.

Qualifying multiple times for the same journey

Customers can qualify for the same journey multiple times, meaning a person could receive the third touch in a series, then requalify and also receive the first touch. If you don't want customers to be able to requalify to get the journey again, exclude users who received any campaign from being eligible from the audience.

Send Time Optimization

It’s not recommended to use Send Time Optimization (STO) on touches in Experience Designer. Doing so could cause some touches to send to a smaller-than-expected audience.

If you want to use STO with campaigns, it’s recommended to build campaigns independently using Campaign Builder.

Splitting Audiences

You can’t edit audience splits independently. For example, you can’t split an audience into Active Buyers, At-Risk Buyers, Lost Buyers, and Non-Buyers, then delete the At-Risk Buyer lane. You also can’t merge the lanes once you’ve made the audience split, so you couldn’t have Non-Buyers and At-Risk Buyers merge into one touch.

When you add an audience split to your journey and add a touch after the audience split, the timing you select for the touch is from the deployment of the first touch to the deployment of the new touch.

For example, if your first touch is a cart abandoned email with a two-lane audience split using Purchased criteria, if you add a touch that fires 24 hours later, it looks at the 24-hour window between the first touch and the second one to determine where to send customers.

If you use a non-behavioral split, such as Discount Preference, any touches after that split need a filter to make sure that customers didn’t purchase after receiving the first email. Otherwise, everybody who received the first campaign will also receive the second one.

Export audience for Facebook, Google Ads

When you create a touch, you can choose between sending an email or exporting your audience via Google Ads or Facebook.

If you integrate Bluecore with your business Facebook or Google account, you can export the audience, including any filters that have been created during the journey, to those accounts to create ads specifically for those audiences.

For example, you can export a list of email addresses using Bluecore Advertise and Facebook integration. Facebook will match any of those emails to current accounts, and display ads to those customers.

You can also export the audience as a list of email addresses in a .csv file via SFTP.

