Unite Education Program v7.1

Job Aid: 5784

Email, Segment and Customer Journey Tips

Make your experience in Journeys a pleasant and productive one. Here are some recommendations to enhance your usage.

Emails

1. Name your emails so you can locate them easily
2. If an email is transactional, be sure to change the **Legal Designation** and remove the **Unsubscribe** link from the default footer
3. Consider adding a **Preheader**
4. Upload images to the Unite Image Gallery before starting your email design
5. Use basic design elements to add content to the message (text, image, button, etc.)
6. If copying and pasting content from a formatted source, use the remove format tool
7. Consider using the *Standard Email Template* to create your email. It contains the required dynamic content settings and excludes the Microsoft Dynamics © copyright.

Segments

1. Keep Status Reason as *Draft* while you work
2. Get an estimate for the number of people included in each segment (when possible)
3. Change the status to **Live** when you are ready to publish
4. Examine the membership
5. Change the status to *Stop* if you want to make updates
   a. Only make updates to fix mistakes or refine your audience once a customer journey has been published
   b. Do not add new queries that change the membership because the audience for the emails may be impacted

Customer Journeys

1. Name journeys so you can locate them easily
2. Specify journey start and end dates and times
3. Set the time zone
4. Add a purpose and description to keep your staff informed
5. Consider using templates
6. If you have access to multiple instances of Unite, be sure to check your school ID to ensure you add journeys for people in the correct program (JD / LLM)
7. Use suppression segments for lengthy journeys that send emails based on application status, substatus, and export decisions
8. Use a recurring journey for repeating an email to the same recipients
9. Keep all Journeys' Status Reason as *Draft* in the training environment