

MICROSOFT DYNAMICS 365 REAL-TIME JOURNEYS

JOURNEY PRE-ACTIVATION CHECKLIST

Before activating your journey, follow these checks and reminders to reduce risk and ensure accuracy.

CONTENT & PERSONALISATION

- ☐ **Proofread content** for grammar, typos and tone.
- ☐ **Use accessibility, spam and content checkers** in the email editor.
- ☐ **Subject line and preview text** updated for each message
- ☐ **Verify field personalisation formatting** is working for field values, e.g. {{FirstName}}.
- ☐ **Confirm any dynamic content** rules are correctly configured, and default values are in place.

AUDIENCE & CONSENT

- ☐ **Correct segments selected** in the journey.
- ☐ **Consent management configured**, including compliance profile(s), consent purpose (e.g. transactional / commercial), enforcement model and topics.
- ☐ **Relevant compliance profile selected** for each journey email and SMS message aligned with consent purpose.
- ☐ **Suppression lists or exclusion segments applied** if needed.

COMPLIANCE & BRANDING

- ☐ **Organisation branding** is consistent (logo, colours and fonts).
- ☐ **Company registered information** is shown in the email footer, including name, address and registered number.
- ☐ **Unsubscribe link** to consent centre to comply with GDPR.
- ☐ **Privacy policy link** recommended for data transparency.
- ☐ **Contact phone number** for support and transparency.
- ☐ **Social media links** to relevant accounts.

JOURNEY CONFIGURATION

- ☐ **Start and end dates/times** are set correctly (including timezone).
- ☐ **Entry conditions** are correctly defined.
- ☐ **No loops or misconfigured paths** in the journey flow.
- ☐ **Wait times and trigger conditions** are correctly configured, and the spacing between messages is appropriate.
- ☐ **Trigger configurations** scoped correctly to target the correct attributes or tables.
- ☐ **Split test settings** correctly configured within journey steps.
- ☐ **Journey exit conditions** selected with the relevant target segment(s) defined if needed.
- ☐ **Consider frequency caps** to avoid overwhelming recipients.
- ☐ **Test journey** internally to simulate and check flow accuracy.

LINKS & CTAs

- ☐ **Test all links** to ensure they direct to the correct pages.
- ☐ **URLs are set as trackable.**
- ☐ **Preference centre links** are included and working.
- ☐ **Call-to-action buttons** are clear and prominent.
- ☐ **For hosted events**, check the correct event record is linked.

SENDER DETAILS

- ☐ **Verified sender email address** (and domain) is selected.
- ☐ **From name** is appropriate and recognisable.
- ☐ **Reply-to address** is valid and monitored.

EMAIL RENDERING & TESTING

- ☐ **Preview using sample contacts to check personalisation.**
- ☐ **Test email sent to yourself** and internal stakeholders.
- ☐ **Send messages inside a journey to yourself** to check personalisations.
- ☐ **View on desktop and mobile devices** to identify potential formatting issues.
- ☐ **Check in different email clients**, e.g. Outlook, Gmail and Apple Mail.

ANALYTICS & GOALS

- ☐ **Custom event tracking configured** if needed, including GA4 event configuration, as appropriate (e.g. track specific PDF download clicks).
- ☐ **KPI goals or conversion events** defined in the journey.
- ☐ **Click tracking and landing page segments setup** as needed.

FINAL CHECKS & APPROVAL

- ☐ **Send day/time** is optimal for audience engagement.
- ☐ **Avoid overlaps** ensuring people are not enrolled in conflicting journeys.
- ☐ **Stakeholder approval received.**
- ☐ **Post-activation monitoring** for any issues or anomalies.