

Workshop

Journeys automation use cases

START



A person is added to the list

Enrolled in the journey



Welcome to Happy Co.

Sends immediately upon enrollment



Wait for 7 days

Ends at 10:00 AM (CDT)



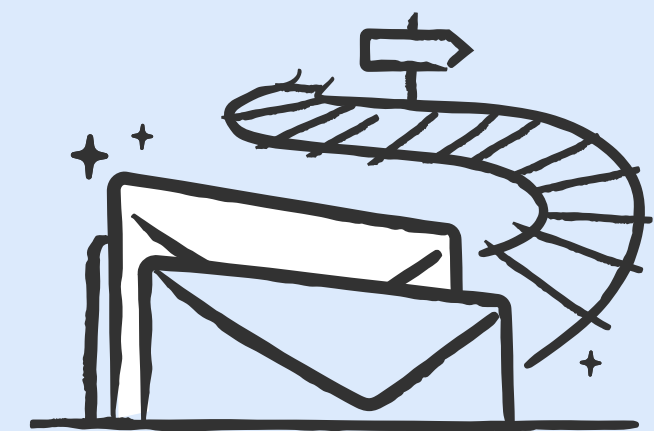
First Week schedule

Sends 7 days after enrollment, at 10:00 AM (CDT)



Wait for 3 days

Ends at 1:00 PM (CDT)



Journeys automate the messages you always mean to send (the welcome emails, the reminders, the moments worth celebrating) and make sure they go out at the right time, every time! Whether a message is triggered by a date, a list update, or a recurring schedule, Journeys take the manual work out of staying consistent.

This guide walks through common ways teams use automation to save time, stay aligned, and support employees across key moments.

For each use case, you'll find a quick overview of how it works, when to use it, and example messages to help you get started.



You don't have to set everything up at once. Start with one moment that matters, and build from there!

Branching in Journeys

Each Journey can branch based on what employees do (or don't do), what list they're on, or even which version of an email they should receive!

There are multiple ways to branch a Journey:

Behavior

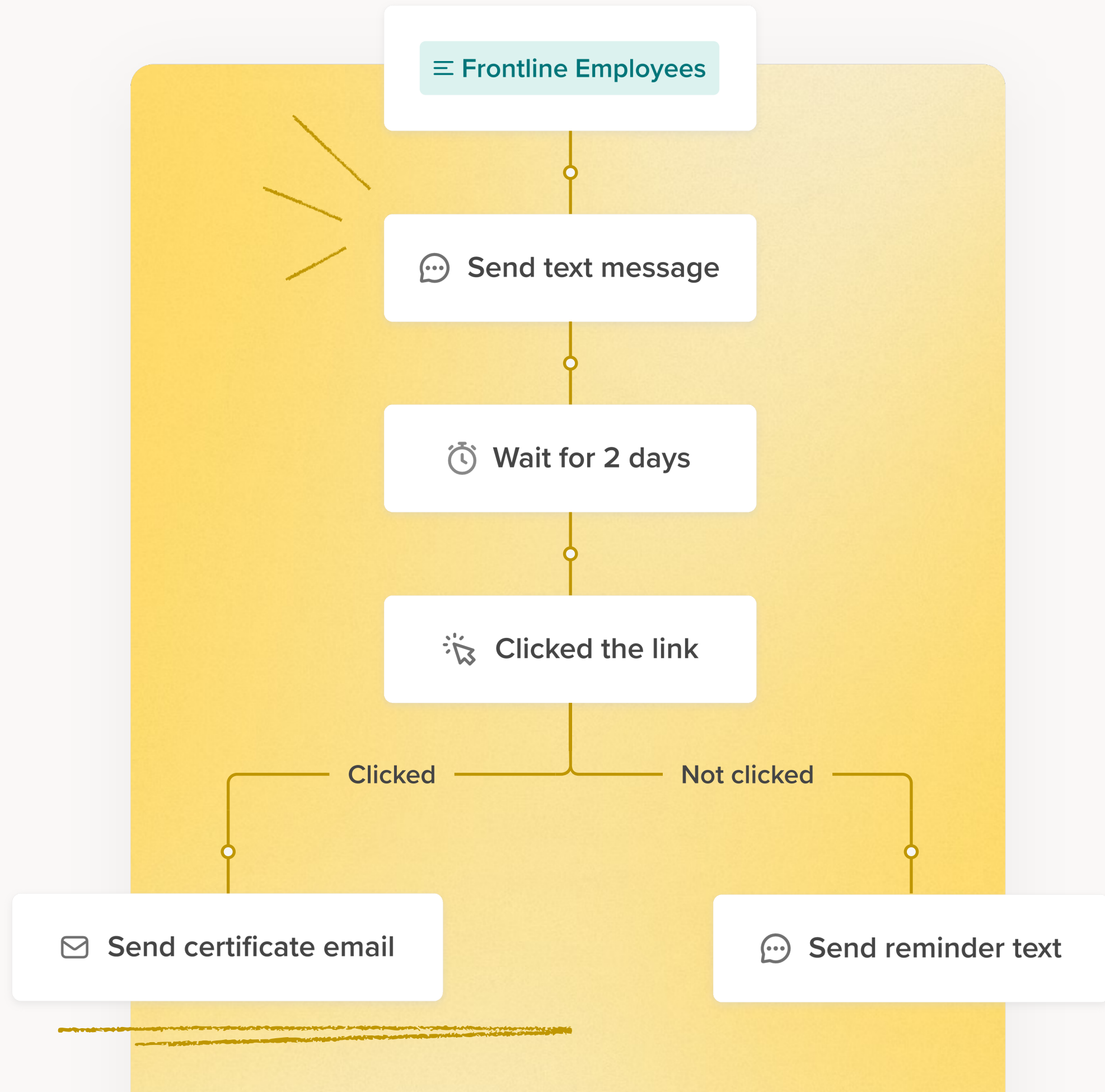
Opened | Clicked | Ignored

Attributes

Role | Dept | Location

Actions

RSVP'd | Joined list | Subscribed



Branching use cases:

Follow up with unopeners

- **How it works:** Send your first email to the full list. After a wait step (usually 2–3 days), the journey branches based on whether each employee opened. Openers exit the journey; un-openers receive a follow-up with a different subject line and a sharper hook.
- **Best for:** Comms teams who want stronger reach on important sends (open enrollment, all-hands, policy updates, surveys) without adding noise to people who already engaged.
- **Trigger:** Manual or list-based
- **Recommended setup:** Email 1 → wait 2–3 days → conditional split on "opened email 1" → un-openers get Email 2
- **Timeline:** 2 emails (one to all, one to un-openers)

Timecard reminder

- **How it works:** A schedule trigger fires every pay period. Branch on a "submitted timecard" list (synced from your HRIS or time tracking system). People who submitted exit; people who haven't get a reminder — and a final-hours nudge if they still haven't submitted.
- **Best for:** People teams, payroll, or ops teams who lose hours each pay period to follow-up.
- **Trigger:** Schedule (e.g., every other Friday at 10 a.m.)
- **Recommended setup:** Schedule trigger → Email 1 to all → conditional split on "submitted" → reminder to non-submitters → final nudge

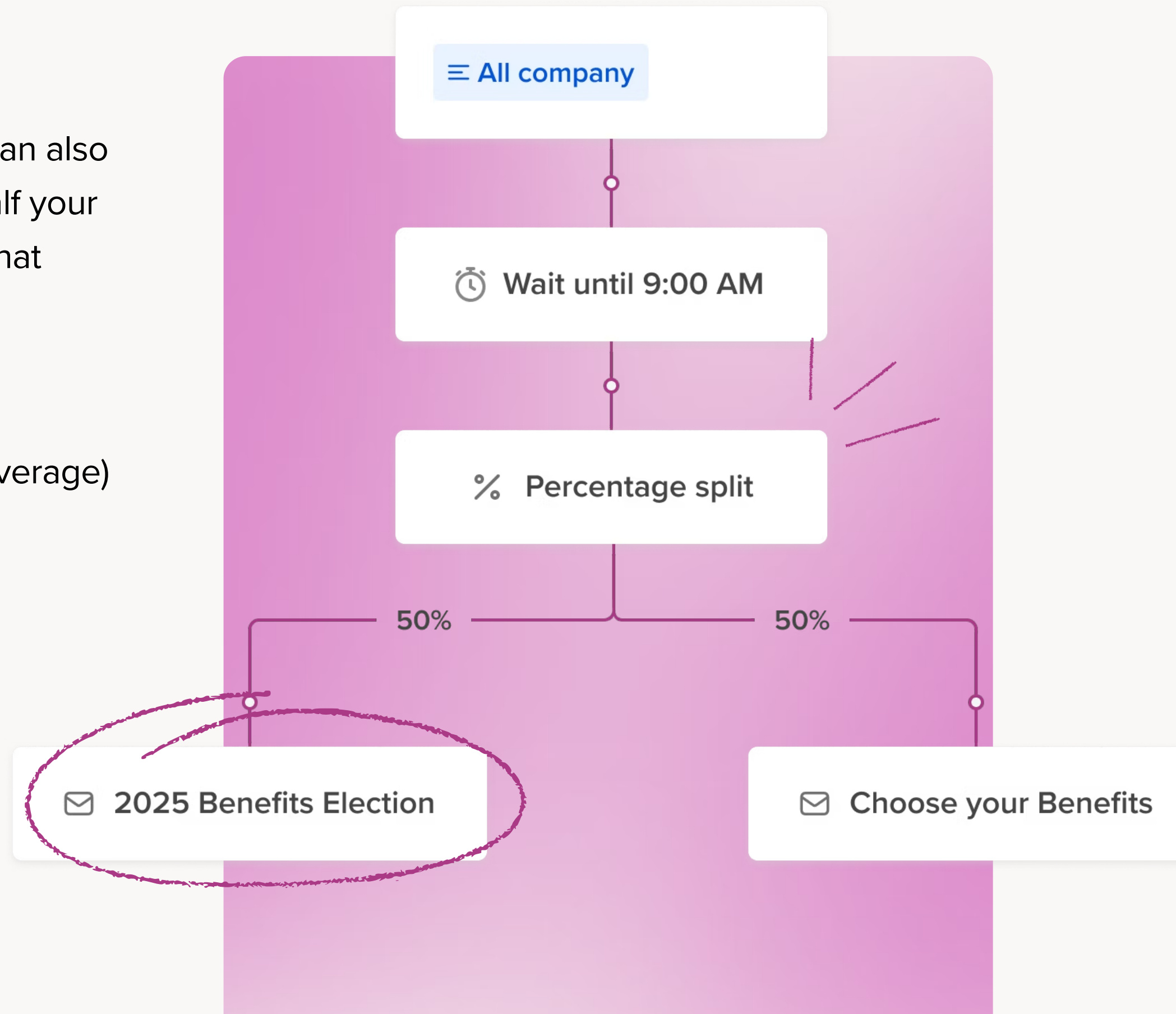
A/B test inside any Journey

Once you have branching set up in your journeys, you can also use them to test message variants. Send Variant A to half your audience and Variant B to the other half — then learn what actually drives action.

Try A/B testing:

- Subject lines (the obvious one, but still the highest-leverage)
- Opening line / first 50 words
- CTA wording and button color
- Email length (long-form vs. skimmable)
- Send time

Run one variable at a time so you know what made the difference, and apply the winner to your next send!



Journeys use cases



Weekly Reminder

Many teams rely on recurring reminder emails for things like submitting timecards, tuning into weekly updates, or reviewing shared content. These messages happen on consistent schedules (weekly, bi-weekly, or monthly) and Journeys make it easy to automate them so teams can focus on higher-impact employee communications.

How it works:

This automation uses a schedule trigger to send messages on a predictable cadence (for example, every Tuesday morning). Once the journey is set up, the message goes out automatically on the schedule you choose, eliminating the need for calendar reminders or manual sends. *Note: if your content varies every send, it's best to send this one manually!*

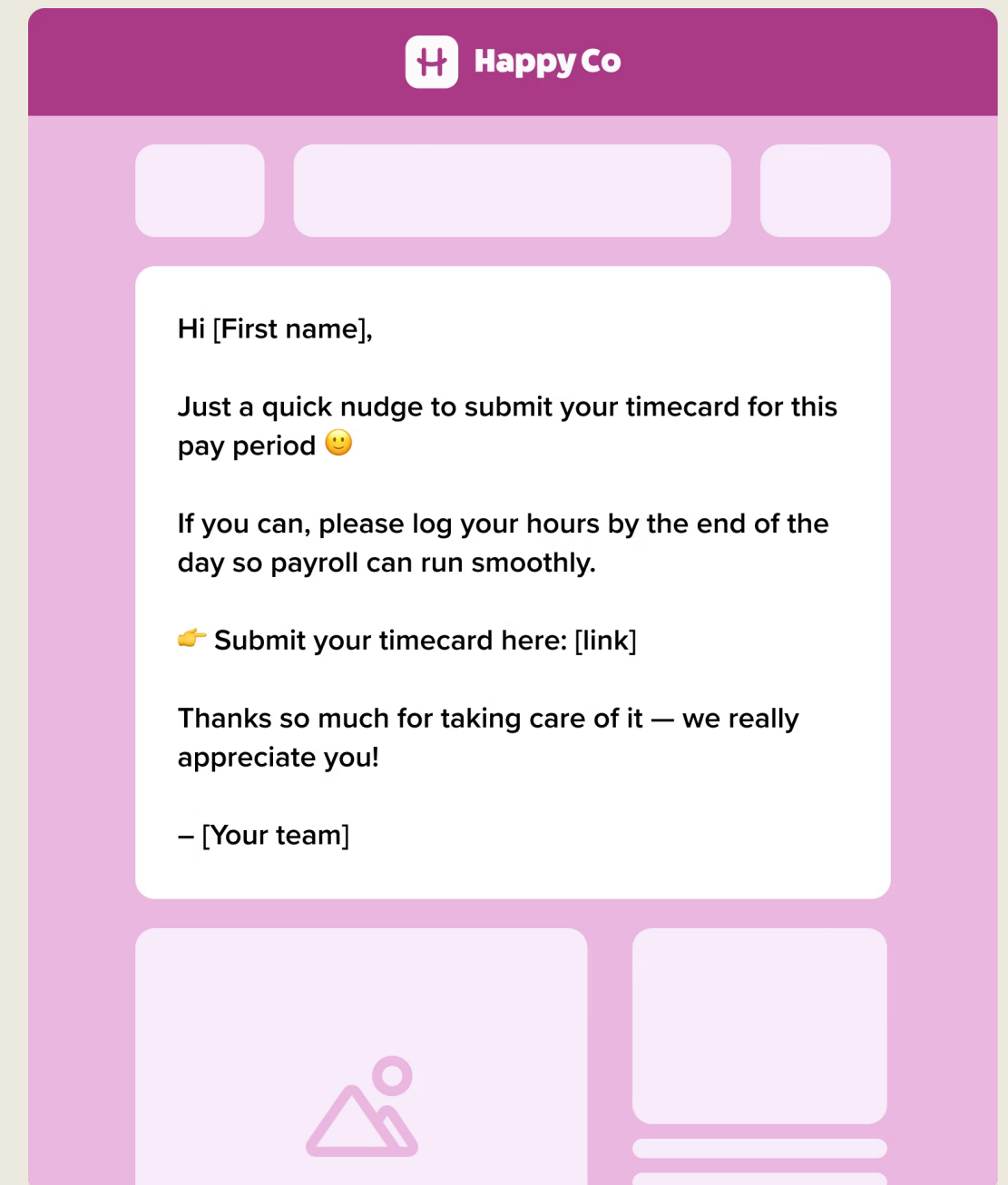
Best for: Teams that share recurring content and want to keep engagement consistent without adding to someone's plate.

Trigger: Schedule-based (runs on a set day and time)

Recommended setup: On a schedule trigger, a list (manual, synced, or automatic) and a recurring send

Timeline: 1 email sent weekly

Email 1: Every Tuesday at 9 a.m. - Weekly timecard reminder



New hire onboarding

This journey welcomes new hires automatically, giving them the context and confidence they need without anyone having to remember to send a single email. Each message is timed to land when it's most helpful.

Make it smarter with branching

Branch on the lists new hires belong to, so every employee gets the version that's actually relevant to them.

- **Remote vs. in-person:** Remote new hires get an "office hours" intro, instructions for shipping equipment, and a virtual coffee schedule. In-office new hires get parking info, a desk-setup checklist, and a "what to expect on your first day in the office" walkthrough.
- **Location or region:** Branch by office or country to send the right local benefits info, holiday calendar, and HR contacts.
- **Department or role:** Engineers get a stack overview and a Slack channel cheat sheet; sales hires get a CRM intro and a quota explainer.
- **Task completion:** Layer in a behavioral split too — hires who already finished IT setup, benefits, and offer docs move straight to "what to expect in week 2"; hires who haven't get a gentle reminder with links to finish what's outstanding.

How it works:

This automation starts when someone's hire date is today (whether that's managed manually, synced or via a smart list). From there, you can use wait steps to send each message on your exact schedule.

Best for: Teams that want to offer a consistent experience to every new hire, without the manual work.

Trigger: They're added to a list (any list - manual, synced or smart list)

Recommended setup: Hire date attribute, automatic list, timed emails

Timeline: 3 messages in the first month



Day 1: Welcome Email

 Happy Co

Hey [First name],

You made it! 🎉 We're thrilled to have you on the team.

Your first few days will be a mix of learning, exploring, and (hopefully) settling in.

If you're not sure where to start, your [manager/team buddy] is a great go-to. We've also put together a quick guide here: [link to onboarding doc or wiki].

Take a breath, take it slow — you've got time to get the hang of things!

We're so glad you're here!

- [Your name]



Day 7: Helpful How-tos

 Happy Co



Hi [First name],

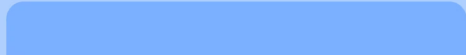
You've officially made it through your first week — we hope you're starting to feel a little more at home.

If anything feels unclear, overwhelming, or off-track, that's totally normal. And we're here to help! Here are a few helpful resources you might want to bookmark:

- Who to ask about what → [link]
- Time off, pay, and benefits info → [link]
- Company values & how we work → [link]

Still figuring things out? No problem! Let us know how we can help.

— [Your company]



Day 30: 30 day check-in

 Happy Co

[First name]!

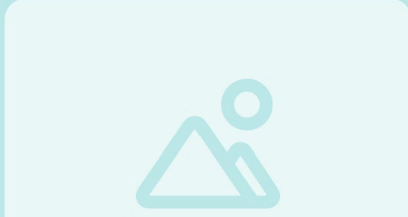
You've been here a whole month — and that's worth celebrating!

By now, you've probably got a few things under your belt (and maybe a few questions too!).

We'd love to hear how your first 30 days have felt. If you've got feedback, ideas, or even a win to share, reply to this note or fill out this quick check-in form: [link]

Thanks for being here!

— [Your name]



Open enrollment

This journey keeps open enrollment running smoothly, sending announcements and reminders right when people need them.

Make it smarter with branching

Branch on whether employees clicked through to the benefits portal.

- Day 14: clicked → exit the journey. Didn't click → continue to the reminder.
- Day 28 last call: only goes to people who still haven't enrolled.

How it works:

You choose a start and end date. On day one, everyone in your “All company” list gets enrolled. From there, you can space out reminders to keep the window top of mind.

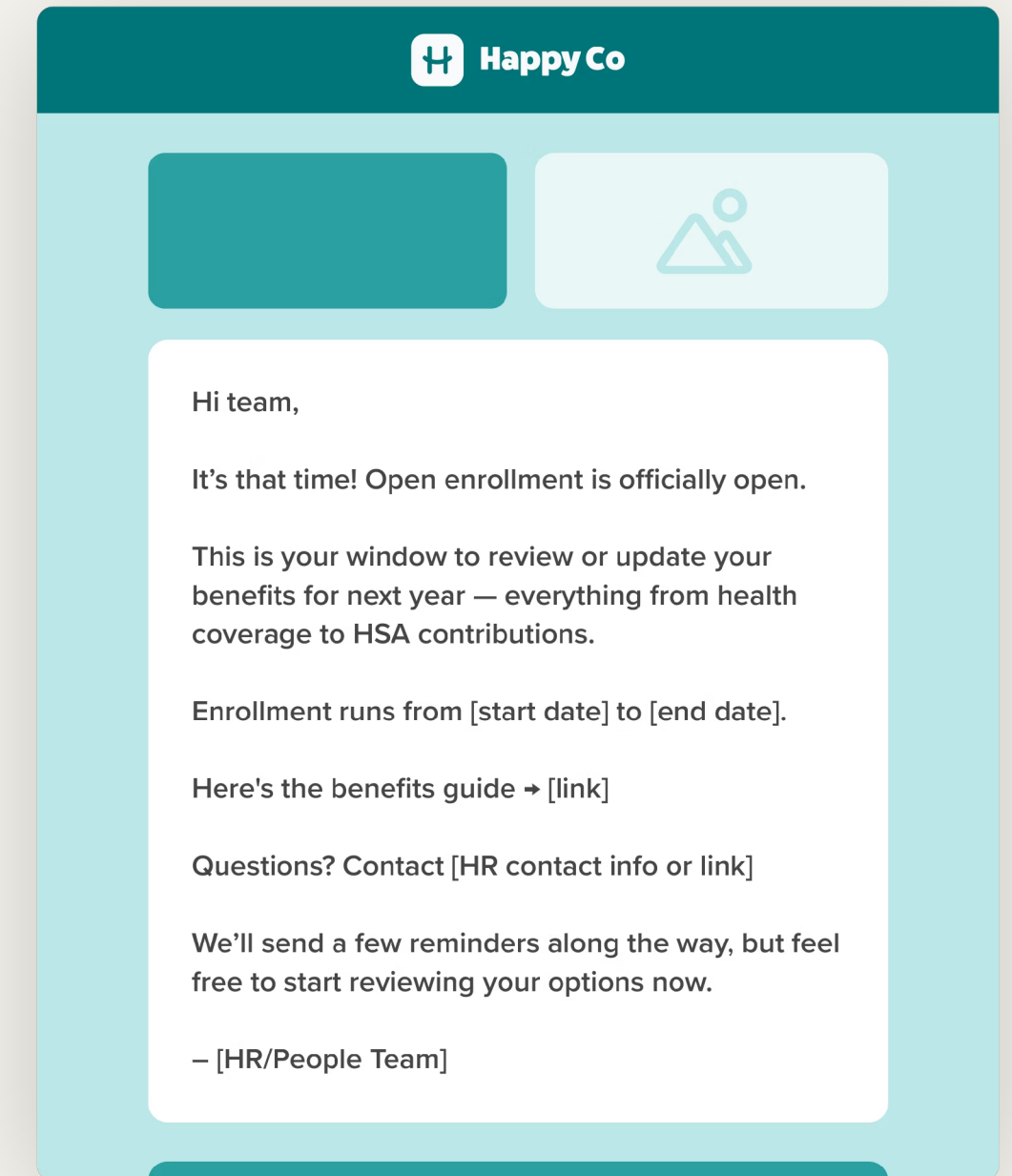
Best for: HR or People teams that want to boost awareness and reduce back-and-forth during enrollment season.

Trigger: You manually start it

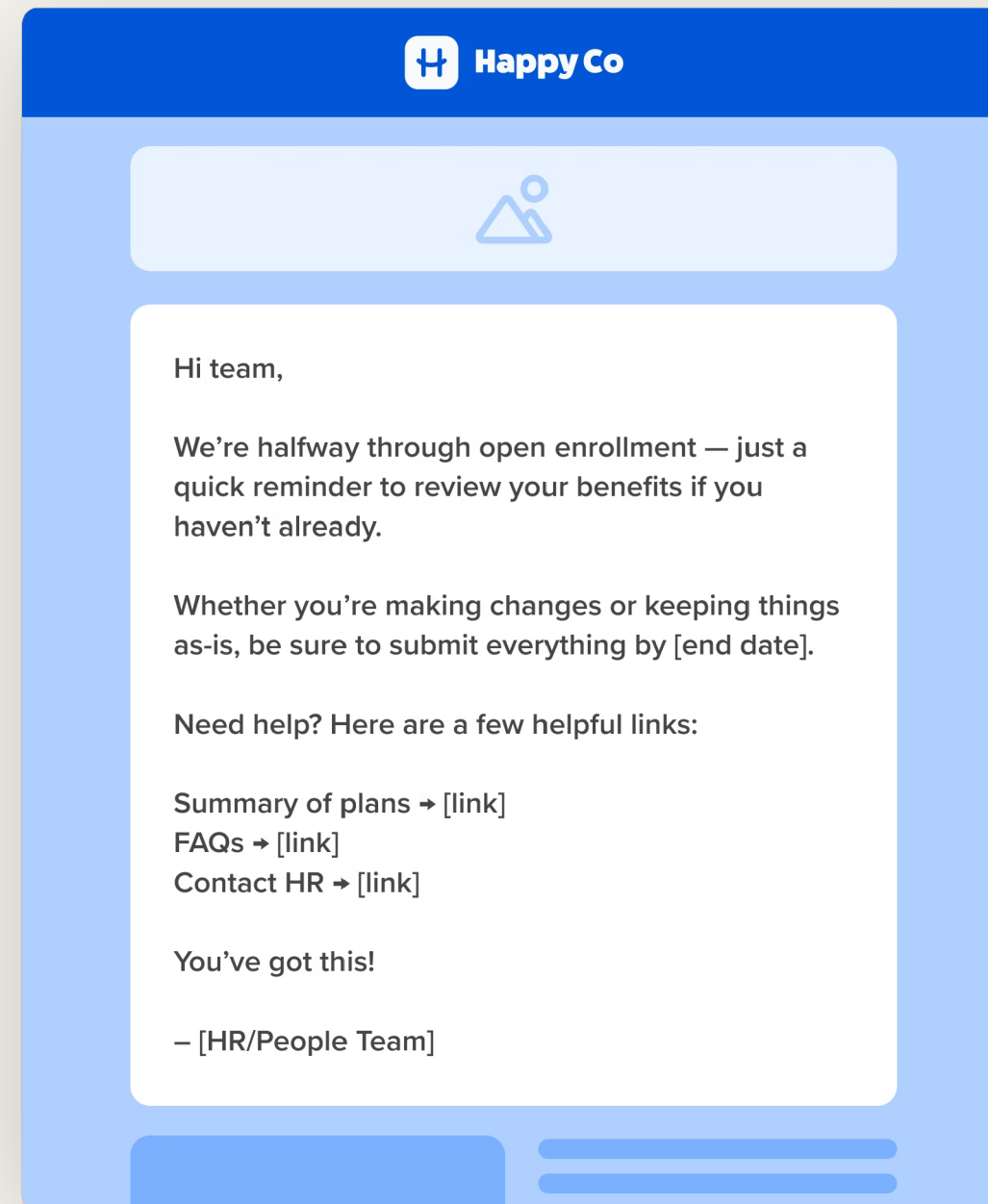
Recommended setup: Date range, select any list (manual, synced, or automatic) and timed messages

Timeline: 4 emails over the open enrollment period

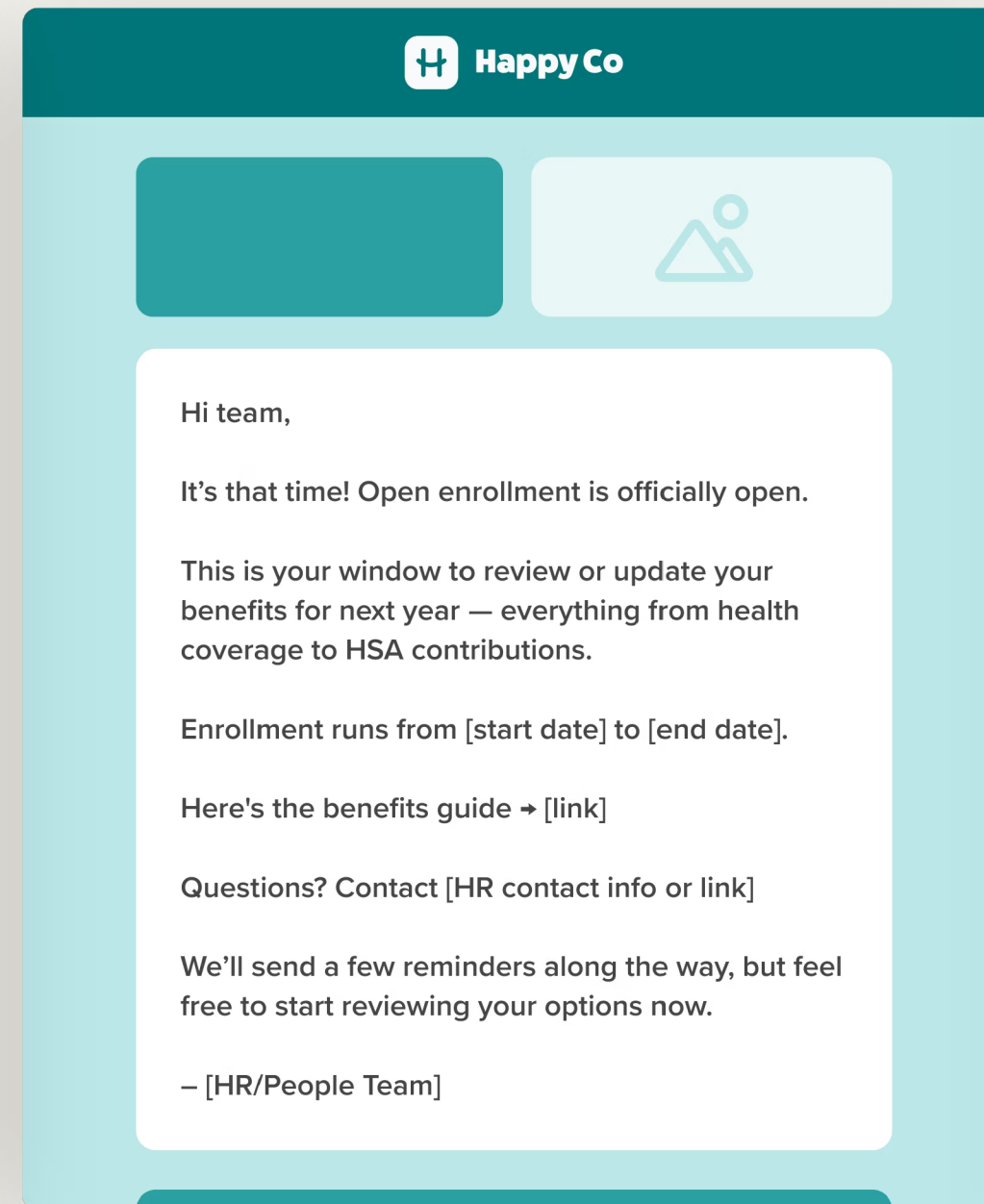
Day 1: Kickoff



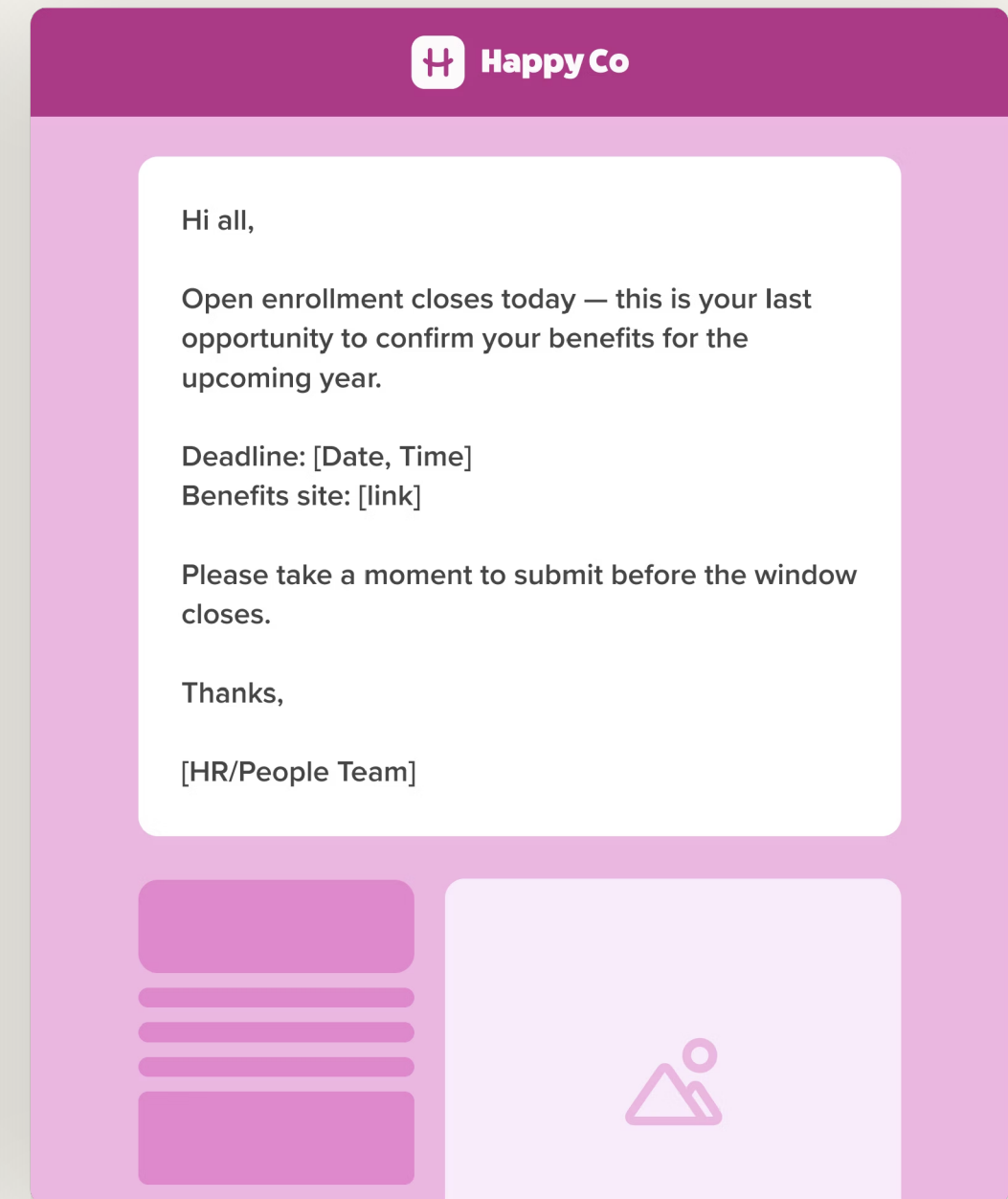
Day 7: Reminder



Day 14: Reminder



Day 28: Last call



Event/company retreat

Whether you're planning a team offsite, an annual retreat, or a one-day event, this journey helps you build energy and make sure everyone has the info they need.

Make it smarter with branching

Branch on RSVP status:

- **Confirmed attendees** → get logistics, prep, packing list, day-of reminders.
- **Non-responders** → get a one-line nudge to RSVP.
- **Declines** → exit the journey or move to a "we'll miss you" send.

How it works:

Start by uploading or syncing your event attendee list. You can add people manually or pull from an existing list. Then, schedule a series of messages leading up to the event.

Ideas for touchpoints:

- Save the date
- Logistics + travel details
- What to pack or expect
- Post-event thank you or survey

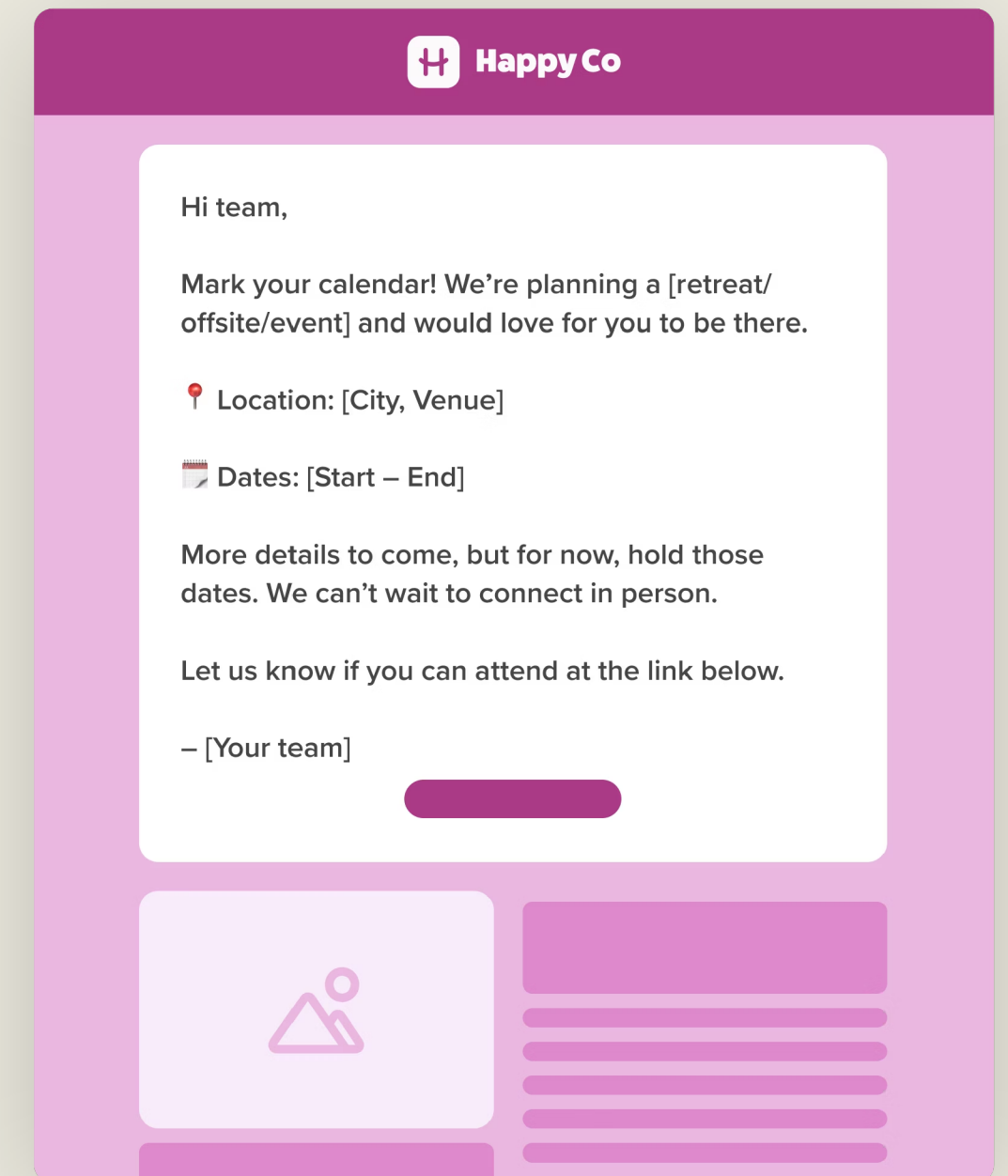
Best for: Anyone coordinating a multi-day event, internal summit, or company gathering.

Trigger: People are manually selected

Recommended setup: Manual or synced list, staggered messages

Timeline: 3–5 emails from announcement to follow-up

Email 1: Save the date/RSVP ask



offsite/event] and would love for you to be there.

📍 Location: [City, Venue]

📅 Dates: [Start – End]

More details to come, but for now, hold those dates. We can't wait to connect in person.

Let us know if you can attend at the link below.

– [Your team]



Branch 1: Confirmed attendees



Hey [First name],

We're so excited to have you at [retreat/offsite event] this year! It's going to be an awesome experience. More details to come, but please let us know if you have any questions leading up to [retreat/offsite event].

See you soon!

Branch 2: Non-responders



Hi [First name],

Just checking in to see if you are able to make it to [retreat/offsite event] this year. We'd love to see you there!

Branch 3: Declines



[First name],

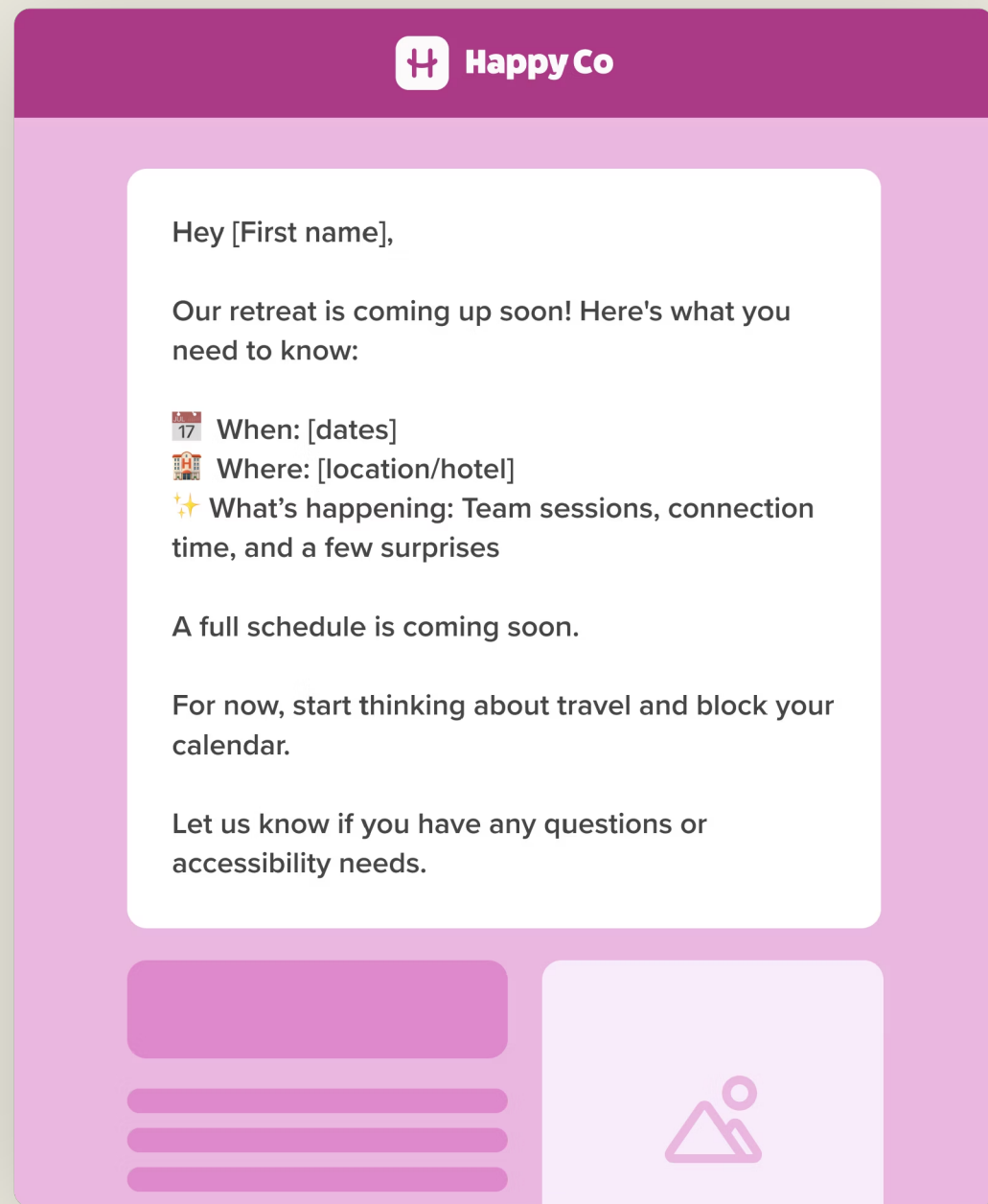
We're sorry to miss you at this year's [retreat/offsite event]. We hope to see you next year!



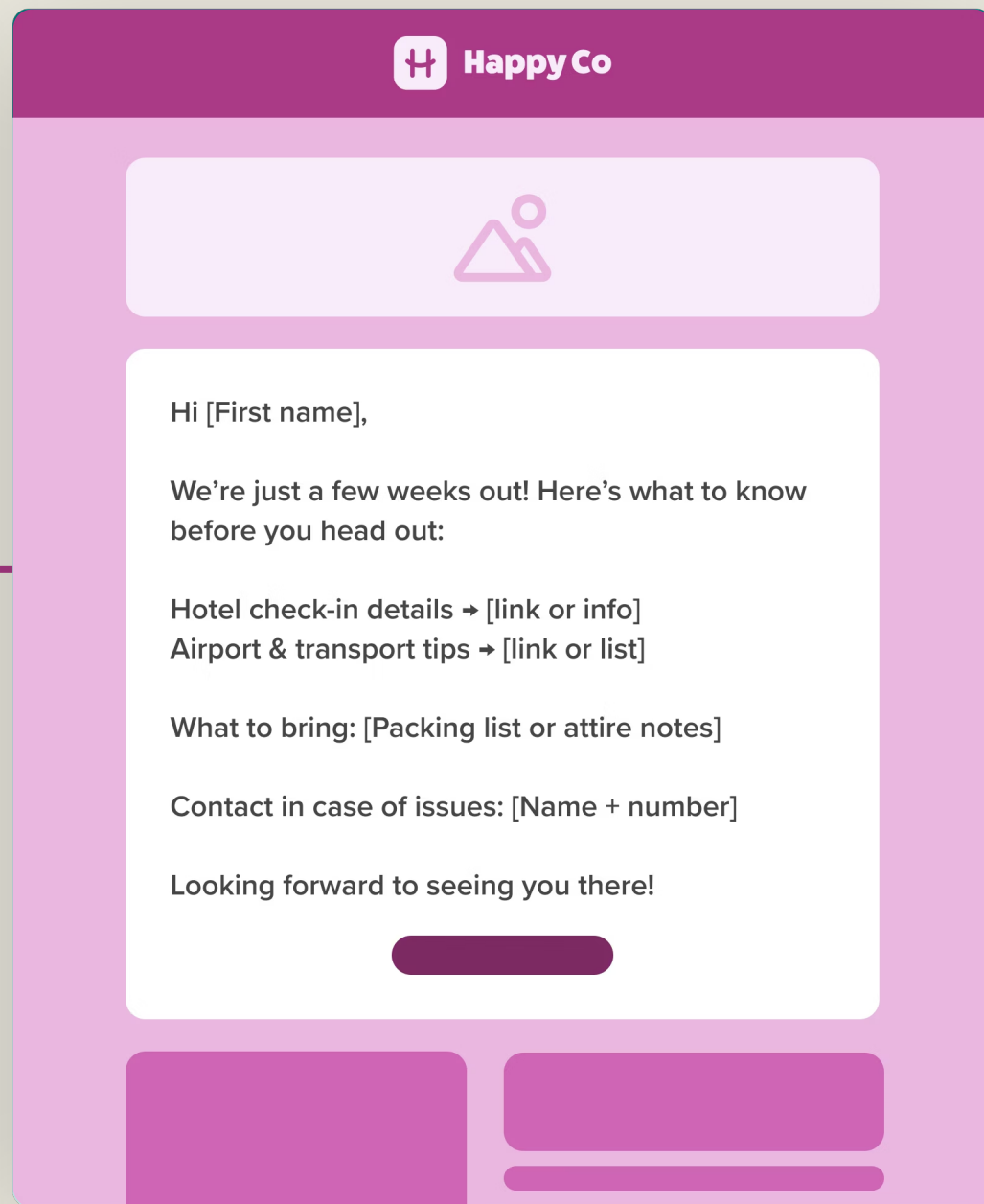


if RSVP = "Yes"

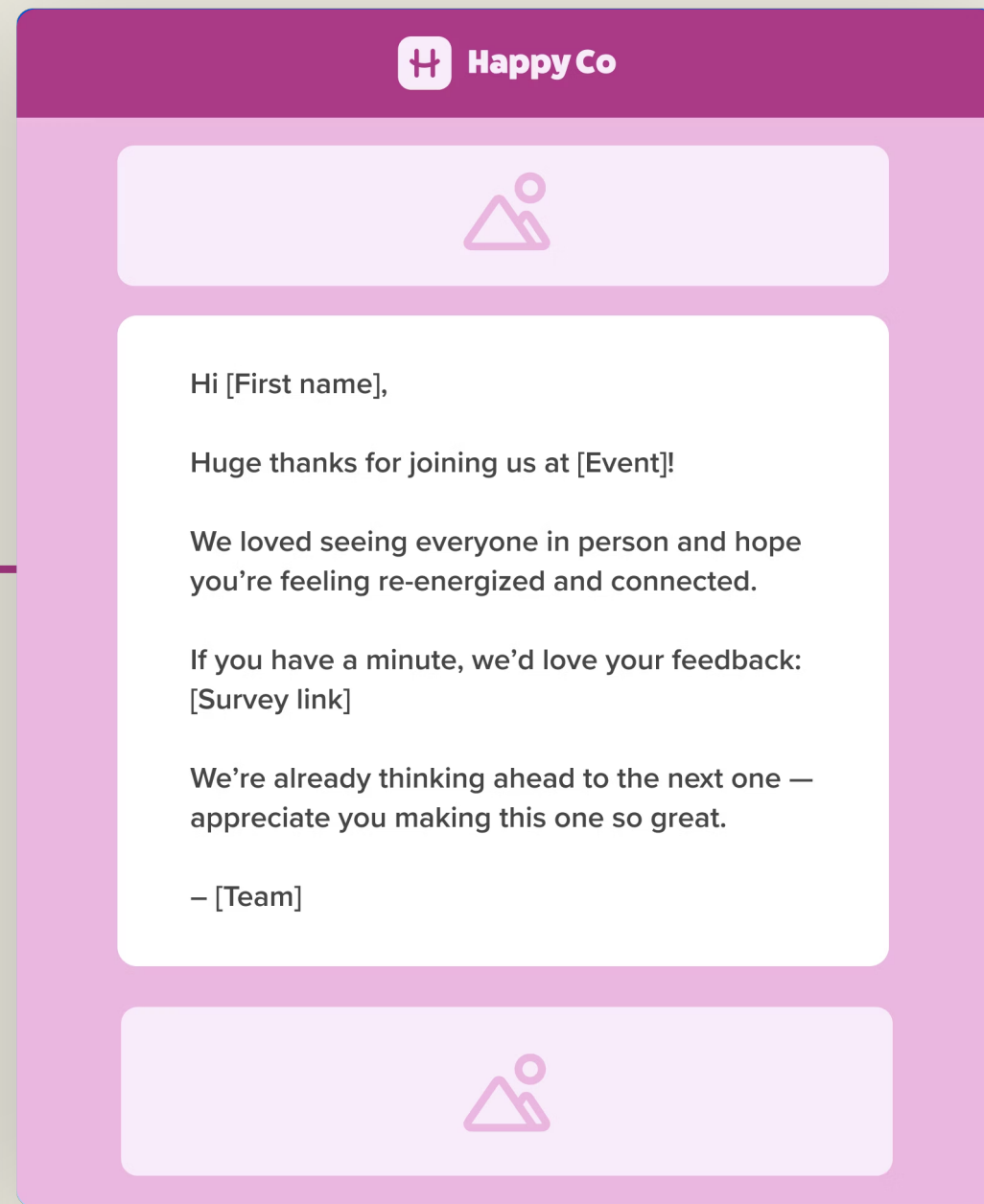
Email 2 (Confirmed attendees): What to expect



Email 3 (Confirmed attendees): Travel details



Email 4 (Confirmed attendees): Event follow-up



Anniversary

This journey sends a thoughtful message to employees on their work anniversary — no spreadsheet checking or reminder setting required.

How it works:

When an employee hits their hire date anniversary, they're automatically added to a smart list (like "Anniversary is today") and sent a celebratory note.

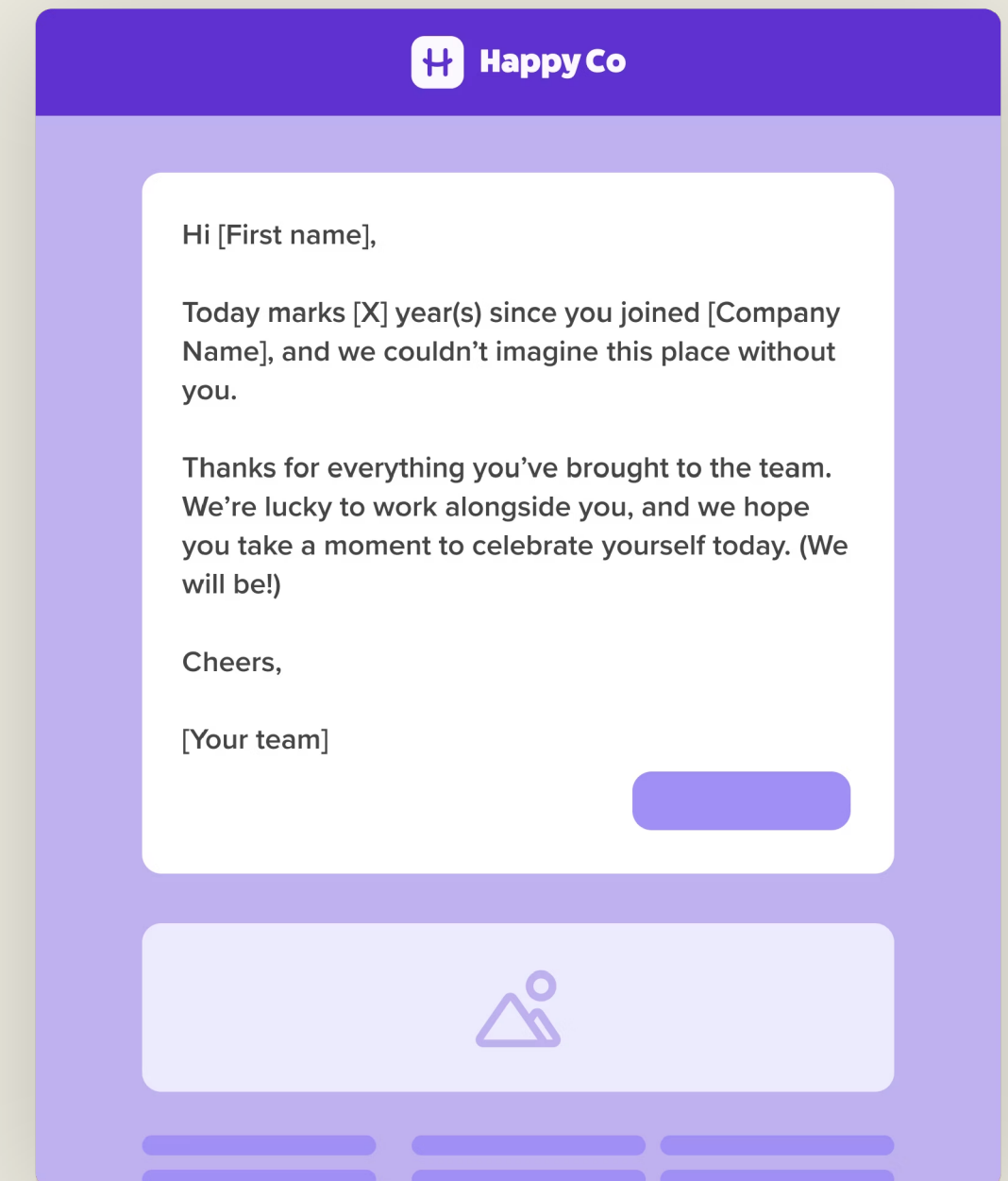
Best for: Teams that want to recognize tenure and boost a sense of belonging.

Trigger: They're added to an auto-updating list

Recommended setup: Hire date attribute, one-time email

Timeline: 1 email on their anniversary

Email 1: Happy Anniversary!



CliftonStrengths: leadership + professional development

This journey supports employee growth by guiding people through a simple strengths discovery experience — and then helping them actually *use* what they learn. It's a lightweight way to reinforce leadership development, coaching culture, and self-awareness without relying on managers to remember every touchpoint.

How it works:

Trigger the journey when someone joins a leadership cohort, a manager list, or a development program. Then, send a short series of messages that walks them through taking CliftonStrengths (or a similar assessment), reflecting on results, and applying insights in 1:1s and day-to-day work.

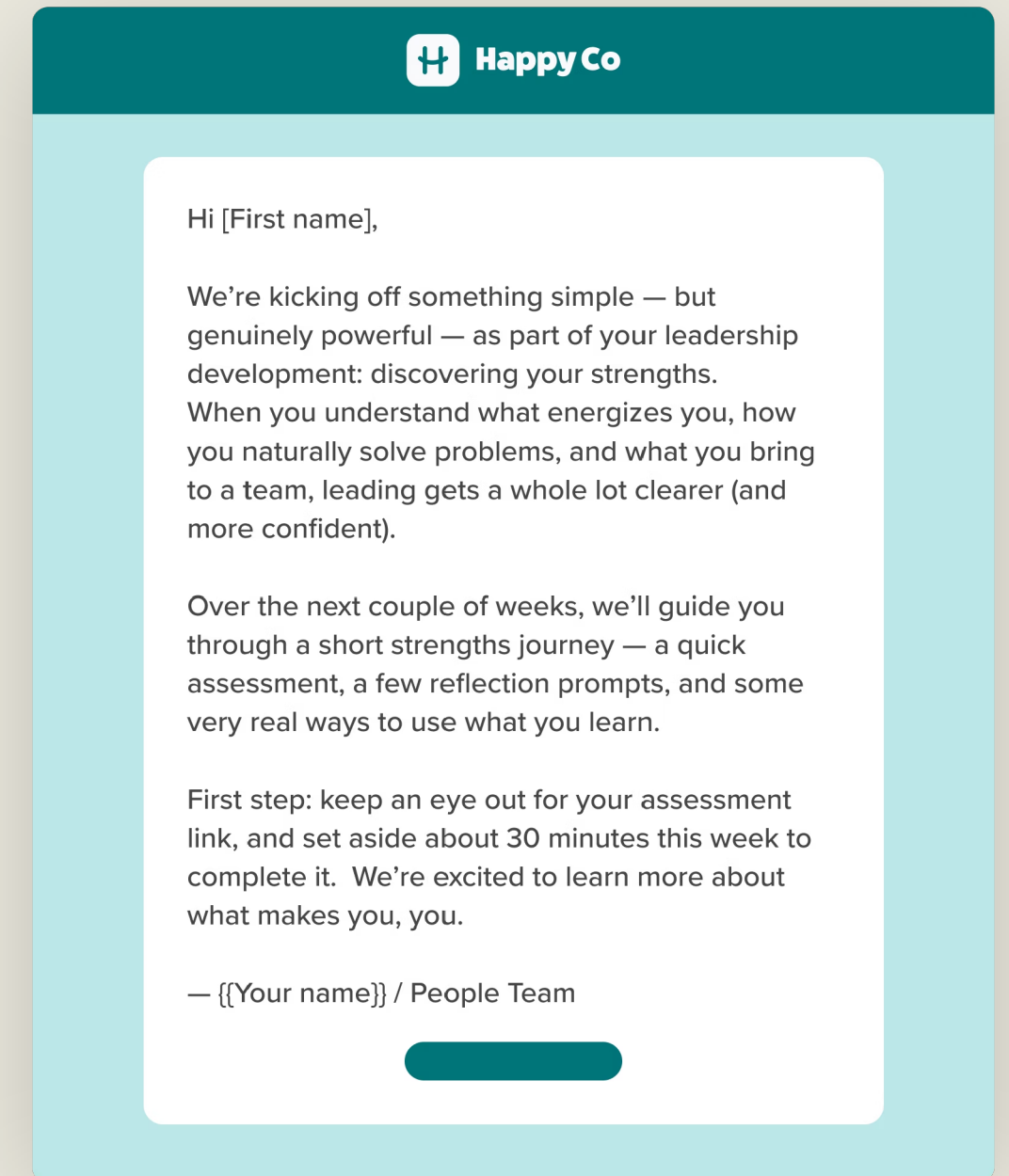
Best for: People teams, L&D, and managers who want to build a shared language around strengths, coaching, and growth — especially for new managers or emerging leaders.

Trigger: People are added to a list (manual, synced, or automatic)

Recommended setup: Role or cohort attribute, manual or smart list enrollment, timed emails,

Timeline: 3–5 emails over 2-3 weeks

Email 1: Kickoff — Leadership starts with self-awareness



Email 2: Take the assessment (30 minutes)

 Happy Co

Hi [First name],

Ready for the fun part? 🎯

Take your CliftonStrengths assessment here:
👉 {{Assessment link}}

What to expect:

- Time: ~30 minutes
- Best tip: take it in one sitting and go with your gut (no overthinking required)

You'll get your Top 5 strengths at the end. There's no "good" or "bad" result here — just insight you can use right away.

You've got this.

— {{Your name}} / People Team

Email 3: Your Top 5 + a quick reflection

 Happy Co

Hi [First name],

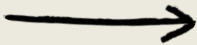
Nice work finishing your strengths assessment 🎉

Take a look at your Top 5 and try this quick reflection:

- Which strength feels the most “well, obviously”?
- Which one surprised you?
- Which strength do you want to use more intentionally at work?

If you're up for it, reply to this email with your Top 5 — we'd love to celebrate what you bring to the team.

— {{Your name}} / People Team



Email 4: Bring your strengths into your next 1:1

 Happy Co

Hi [First name],

One of the best ways to make your strengths useful is to talk about them out loud.

In your next 1:1, try sharing:

- Your Top 5 strengths
- One strength you want to lean into more
- One strength that can become a watch-out under stress
-

Conversation starter you can steal:

“I learned a bit about how I work best — I’d love your perspective on where you’ve seen these strengths show up.”

A little self-awareness goes a long way in leadership.

— {{Your name}} / People Team

Email 5: Strengths in action (mini challenge)

 Happy Co

Hi [First name],

Quick challenge for the week: pick one of your strengths and use it on purpose.

A few ideas to get you started:

- Strategic → Map out 2–3 options before your next decision
- Relator → Schedule a 15-minute coffee chat with someone you don’t work with often
- Achiever → Set one meaningful (and finishable!) goal for the week
- Communication → Share a clear update that brings your team into alignment
- Learner → Spend 20 minutes exploring a new tool or topic

If you want to reply and share which strength you picked, we’d love to hear how it goes.

— {{Your name}} / People Team

Employee Resource Group welcome

This journey helps Employee Resource Groups (ERGs) grow membership and keep people engaged by automatically welcoming new members and giving them a clear next step. It's a simple way to make joining an ERG feel personal and intentional, without relying on ERG leads to manually send messages every time someone signs up.

How it works:

Trigger the journey when someone joins an ERG list (like Women's Network, Pride, Veterans, Parents, etc.). Then, send a short series of messages that welcomes them, shares what the ERG is all about, and invites them into the community through events, resources, and easy ways to get involved.

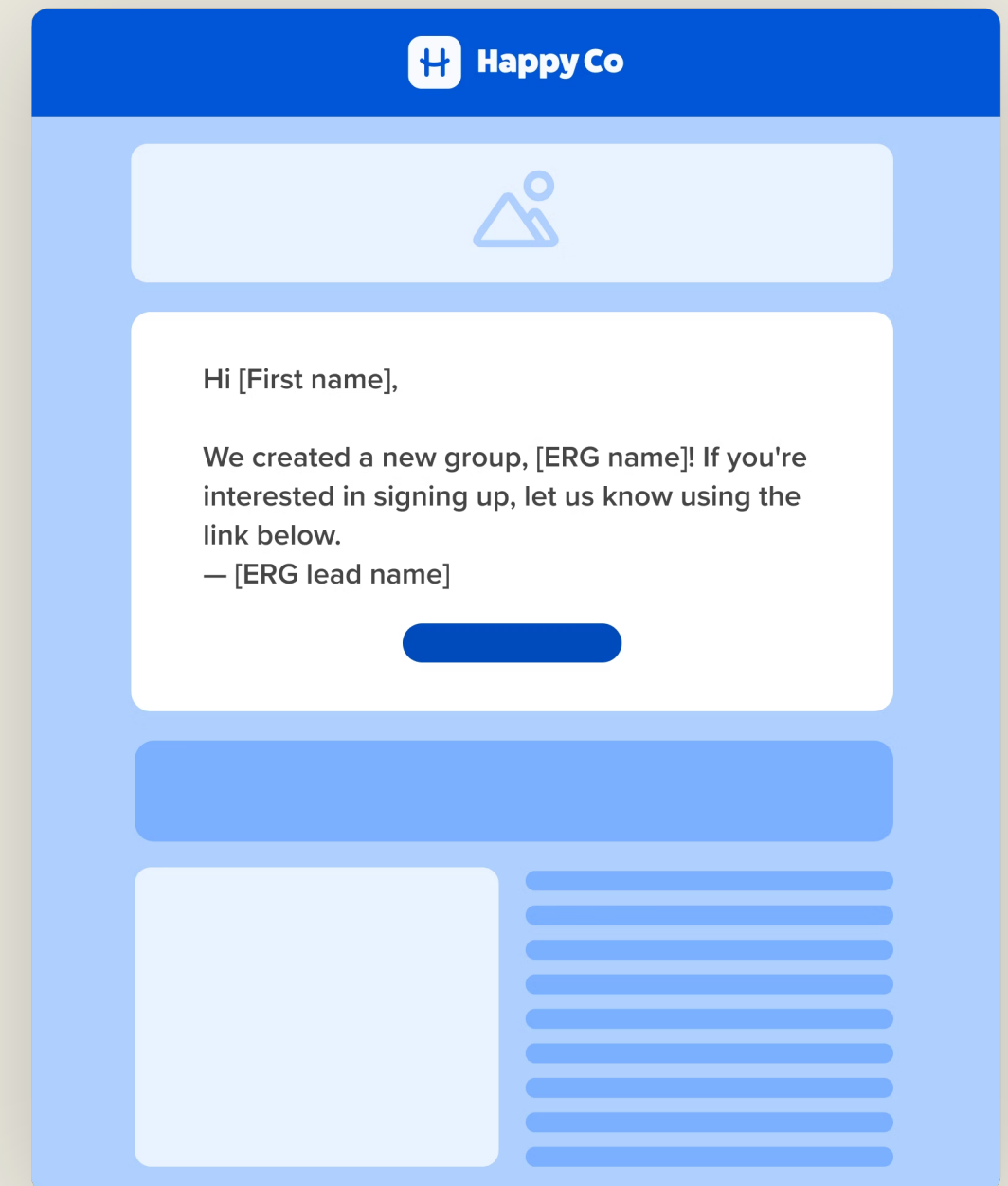
Best for: ERG leads, DEI teams, People teams, and internal comms teams who want to build belonging and participation with minimal effort.

Trigger: People are added to a list, specifically an ERG list (like Women's Network, Pride, etc.)

Recommended setup: ERG membership lists, optional segmentation by location or office, timed emails, optional "reply to meet a buddy" CTA

Timeline: 1 to 4 emails over 1 to 2 weeks

Email 1: Invite to the ERG (gather interest)



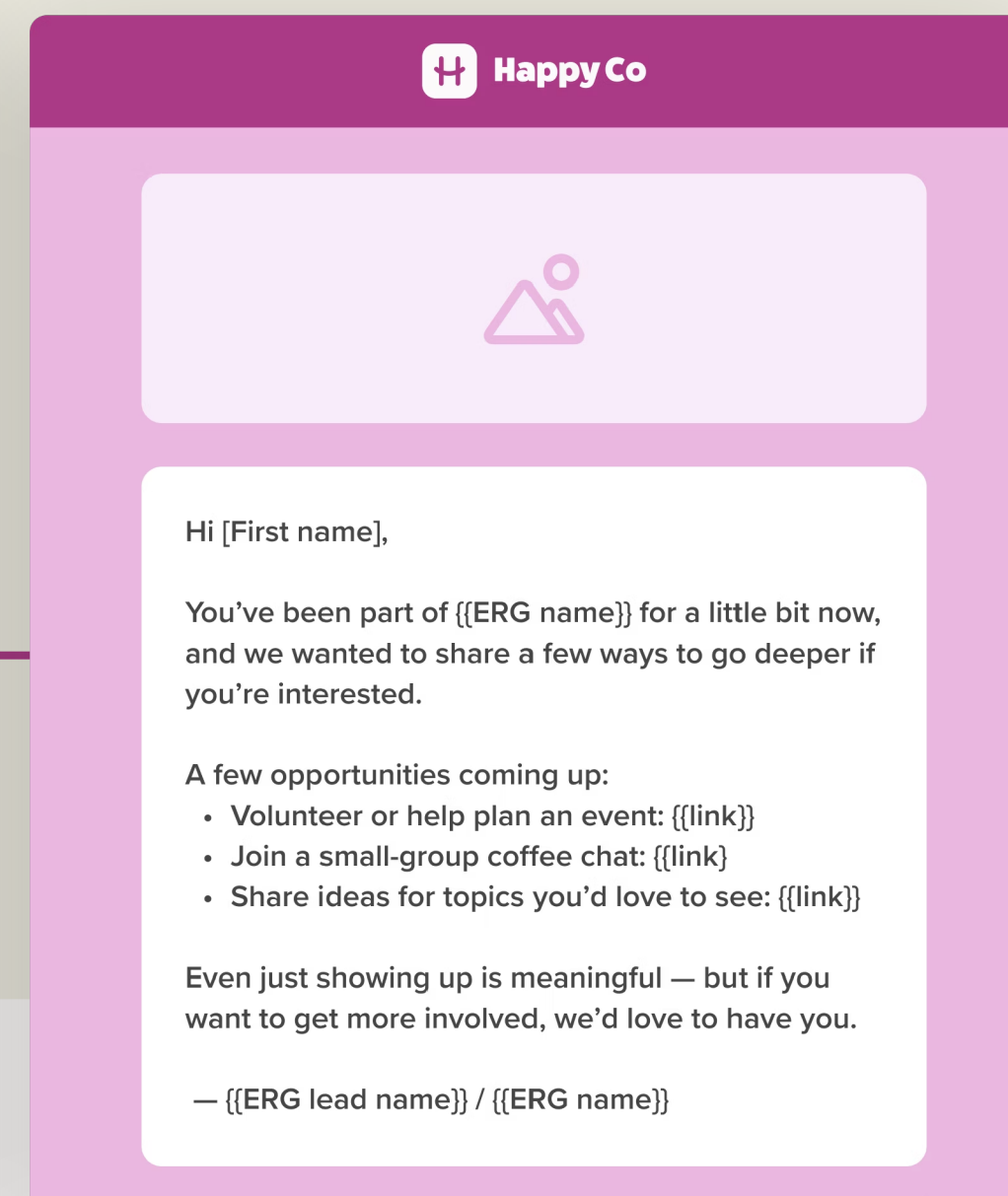
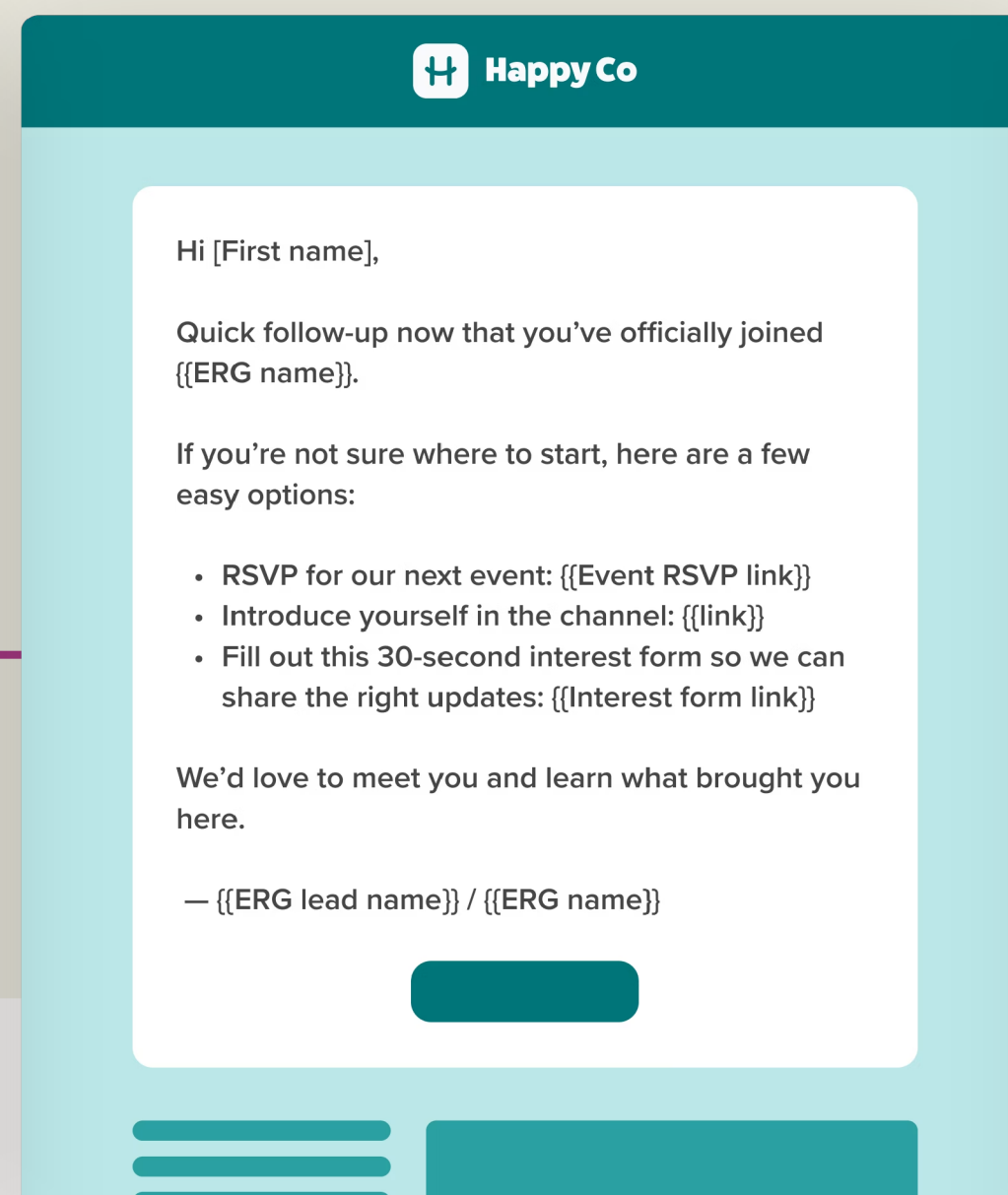
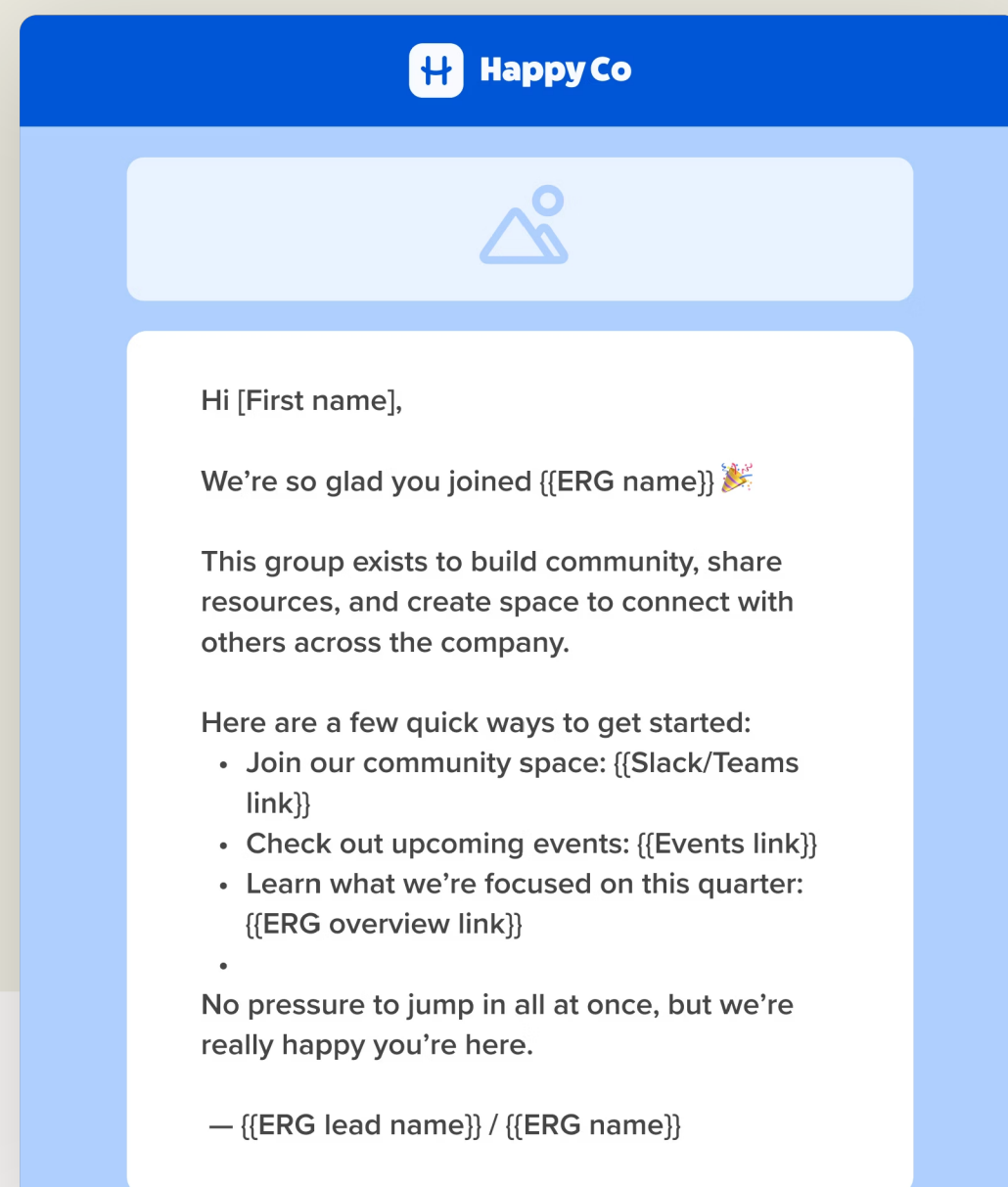


if signed up for ERG

Email 2: Welcome to the ERG
(you're in the right place)

Email 3: Get connected
(one small step)

Email 4 (optional):
Want to get more involved?



Additional use cases we're seeing from customers that we love:

IT/ Security trainings:

- **Why it's great:** Drives compliance without annoying everyone.
- **Trigger:** Added to "Training required" list
- **Timeline:** 3 touches + last call
- **Branching:** Completed → Exit; Not completed → Reminder; Still not completed → Manager loop-in.
- **Messages:** Start training, reminder, deadline, escalation note

New hire "benefits + basics" drip (weeks 2–4)

- **Why it's great:** People forget everything from day one.
- **Trigger:** Hire date + wait steps
- **Timeline:** 3–5 touches
- **Messages:** Benefits 101, time off norms, how expenses work, where to find policies, who to ask for help

Return-from-leave (parental / medical / extended leave)

- **Why it's great:** A high-empathy moment that's easy to miss.
- **Trigger:** Added to "Returning from leave" list
- **Timeline:** 2–3 touches
- **Branching:** Branch on role / department to send the right context (manager-specific updates, team changes).
- **Messages:** Welcome back, key updates, who to contact, "it's okay to ramp slowly" note



Additional use cases we're seeing from customers (continued):

Role change / promotion journey

- **Why it's great:** Promotions are exciting...and chaotic. This adds clarity.
- **Trigger:** Attribute change (Role/Level/Manager) or added to "Promoted" list
- **Timeline:** 3–4 touches over 2–3 weeks
- **Messages:** Expectations, support resources, manager alignment, "first 30 days in role" check-in

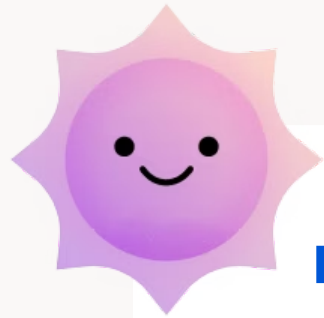
Employee lifecycle milestones (90 days + 6 months)

- **Why it's great:** Keeps retention and belonging from being "set it and forget it."
- **Trigger:** Hire date
- **Timeline:** 2 messages
- **Branching:** Branch on engagement-survey response so you only follow up with people who flagged friction.
- **Messages:** "How's it going really?" + "What would make your job easier?"



Not every message lands the first time! Re-engage with employees who haven't opened or clicked with **automated follow-ups** across all of your channels.

Start with Cici, the AI assistant for internal comms



Prompts to ask:

- “Help me build a 30-day new hire journey.”
- “Write a weekly reminder that doesn’t feel repetitive.”
- “Create a promotion journey for new managers.”
- “Draft a 3-email offsite series.”
- "Add a follow-up to un-openers to my open enrollment journey."
- "Help me build an event journey that branches on RSVP."
- "Write a 4-email performance review journey with branching for completed vs. not started."
- "A/B test the subject line on my weekly all-hands reminder."
- "Build a content subscription journey for our women's ERG."

