OneSignal customer journey design workbook

A working specification for agreeing on entry, branching, exit, and re-entry

A practical IXC resource for adoption decisions and delivery

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Using this resource

Starts from the customer's target action, sets the journey conditions, data, and test evidence, and passes them to the implementation owners.

CRM marketers, product owners, developers implementing journeys, and QA owners

Contents

01 Write the action to complete before the message to send 3

02 Decide entry, exclusion, exit, and re-entry in one table 4

03 Worked example: from acceptance to shared task completion 5

04 Journey design worksheet 6

05 Branch verification worksheet 7

06 Include the basis for decisions in the operational handover 8

How to complete and reuse it

Read the criteria in this PDF, then fill the blank fields with your actual conditions and anything still unconfirmed. The Excel file for the same practice area has a worksheet for each resource. Keep the worked examples separate from real customer cases and confirmed quotes.

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Write the action to complete before the message to send

A campaign is the work of designing the reminders a customer needs until the task is done. Exit conditions are precise only when a successful send and the customer's task completion are defined as separate items.

The journey brief records the target action, the states in which the customer needs help, the states in which you will not intervene, and the source of truth to check. If you start with copy that drives clicks, customers who have already finished the task can remain in the audience. If the system and owner that confirm completion have not been decided, agree on the event definitions before producing messages. In a service where one person belongs to several organizations, identify not only the user but also which task in which organization.

Design item	Worked example: IXC-DEMO-01
Service and purpose	Shared task completion reminder for a fictional B2B collaboration service
Entry action	Team invitation accepted: invitation_accepted
Target action	Shared task completed: shared_task_completed
Unit of assessment	Combination of user, workspace, and invitation

> **Status of the design example**
>
> IXC-DEMO-01 is IXC's own example of how to complete this workbook. Live-account event delivery and message receipt tests have not been performed. The results in the tables that follow are expected outcomes to confirm in testing, not records of actual performance or completed verification.

Decide entry, exclusion, exit, and re-entry in one table

A journey is complete only once you have decided what happens when the same user enters more than once. Record completion, a consent change, and leaving the organization as separate exit reasons.

Condition	Worked example	Evidence to check
Entry	Valid invitation accepted, task incomplete	Backend acceptance and completion status
Exclusion	Already completed, account deleted, or consent not valid	State lookup just before the send
Exit	That task completed, or membership lost	Exit reason and correlation key
Re-entry	Replays of the same invitation are blocked	Duplicate handling record
New invitation	Reviewed separately once the earlier one has ended	Active invitation list

OneSignal Journeys triggered by a Custom Event allow the same user to re-enter and to enter concurrently. Do not read the Re-entry rules of segment-triggered Journeys as a deduplication safeguard for event-triggered Journeys. This example limits each user to one active invitation in the backend. To process several invitations in parallel, first verify separately how the task identifiers in the entry and exit events are linked.

> **The first step needs review too**
>
> A user who meets the entry and exit conditions at the same time may exit after the first step runs. Design the first step's wait and entry exclusions, and test that users who have already completed the task do not receive a message from the start. An exit rule alone does not replace the state check just before the send.

Worked example: from acceptance to shared task completion

Make task conditions, delivery conditions, and data uncertainty separate branches. Do not include a path that treats missing data as incomplete and sends a reminder.

The campaign ID is IXC-DEMO-01. It uses user_id=usr_demo_01, workspace_id=ws_demo_01, and invitation_id=inv_demo_01. The reminder channel is web push. When the server commits the invitation acceptance, invitation_accepted is recorded. When the agreed observation interval ends, completion of the same task is looked up again. The observation interval and permitted sending window are left as inputs for the operations team to approve.

Decision order	Condition	Expected outcome
Status check	That shared task completed	Exit without a reminder
Access check	Account deleted or left the workspace	Send stopped and reason recorded
Consent and channel	Consent not valid, or not subscribed	Excluded from the send; no ad hoc channel substitution
Data check	Lookup failed or relationship unresolved	HOLD, checked by the owner
Reminder	Task incomplete; access, consent, and subscription valid	One reminder at the agreed time

> **Worked example: reminder copy and destination**
>
> Title: ‘Continue your first task with the team.’ Body: ‘Complete the shared task in the workspace you were invited to.’ The destination is the relevant task screen in ws_demo_01. The logged-in user's access is checked again; without access, an access notice is shown instead of the task content. The copy and link are drafts, not yet tested on real devices.

Journey design worksheet

Marketers write down the action and the reason to intervene; developers write down the data and the decision points. For items not yet agreed, record the decision owner and the checks still needed.

Agree on goals and conditions

Question to agree on	Evidence required	Your answer	Owner and status
Who completes which task?	Target event and task source of truth		
What separates entry from exclusion?	Condition expressions and audience sample		
When do you recheck and send the reminder?	Observation interval and permitted sending window		
Under what conditions does a user exit or re-enter?	Exit reasons and duplicate criteria		

When one sentence contains several conditions, state AND and OR explicitly. For example, write ‘invitation accepted AND that shared task incomplete AND current membership valid’. ‘Completion unconfirmed’ is a different value from ‘incomplete’. In that state, hold the send and find the cause of the failed lookup. If an organization name typed in by the customer appears in the message, also write fallback text for empty values, long values, and inappropriate strings.

> **Criteria for a completed worksheet**
>
> Size the implementation scope only once the campaign version, task correlation key, observation interval, permitted sending window, channel, exit conditions, and stop owner are all set. If any item could not be agreed, record it as HOLD, or as READY WITH CONDITIONS with the conditions for resolving it.

Branch verification worksheet

Checking only normal entry misses duplicate sends and missed exits. Confirm that the task's completed state does not revert when the same data is entered in a different order.

Link inputs and expected outcomes to test evidence

Question to agree on	Evidence required	Your answer	Owner and status
What if the same invitation event is replayed?	No additional entry or send		
What if the completion event arrives first?	Completed state kept; no reminder		
What if someone logs in with another account?	Previous user's reminder not shown		
What if consent is withdrawn during the wait?	Later sends excluded; handling recorded		

For each test, link the starting state, input event, expected outcome, actual outcome, and log location. The tests in this example have not been performed, so the result fields are left blank. Also add a test that feeds in a completion event from a different workspace. If completion of an unrelated task ends the current journey, the correlation key design is wrong. After checking delays, duplicates, and out-of-order events, verify actual receipt and link navigation channel by channel.

> **User and Subscription tests**
>
> Test multiple Subscriptions linked to one User and account switching on one device as separate cases. Even if the user becomes anonymous after logging out, do not conclude that unsubscribes and account deletion have been processed automatically. For each state change, check against the implementation specification which reminders must be blocked.

Include the basis for decisions in the operational handover

If only the journey diagram is handed over, the original intent is hard to recover when conditions change. Hand over the approved design, the actual settings, the test results, and the measurement criteria as one version.

Handover item	What to record	Completion check
Design and settings	Conditions, correlation key, and message version	Cross-checked by owners
Verification	Input, expected and actual outcomes, and evidence location	Unresolved errors assessed
Measurement	Sends, clicks, and task completion kept separate	Denominator and period agreed
Operations	Stop authority, change approval, and review date	Backup owner assigned

Count shared task completion from the server's committed record. Do not substitute the number of users who reached the end of the Journey, or the number of message clicks, for the number of customers who completed the task. Set comparison groups and observation periods separately in the measurement design. For each change, record which hypothesis changed, which branches are affected, and which tests must run again. After fixing a failed condition, revalidate it with the same inputs.

> **Implementation scope to set with IXC**
>
> IXC's Journey Orchestration service connects lifecycle stages and journeys, segment and event conditions, experiment criteria, and operational handover. The build scope is agreed on the basis of the unresolved data requirements and branch tests in your completed specification. Monthly sends and experiment operations connect to the Managed CRM Campaign Operations service.

Publication and use

Based on your current customer flow and data, and the exit and re-entry conditions you have written, we discuss journey implementation and operational handover.

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www.ixc.co.kr/en/services/journey-orchestration

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References

OneSignal Journey settings

https://documentation.onesignal.com/docs/en/journeys-settings

OneSignal Journey actions

https://documentation.onesignal.com/docs/en/journeys-actions

OneSignal Users

https://documentation.onesignal.com/docs/en/users

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