



Journeys Automation Tool / Branching by Product Data

Goal

Create a more robust and advanced filtering for targeted messaging for clients. Allow for more flexibility and control on who receives what messaging within Journeys.

Increase CVR & CTR of messages

Increased overall revenue for clients

Increase Journeys overall adoption (reduce CSM involvement)

Overview

The previous version of journeys had 3 basic triggers. Abandoned cart, purchased, and viewed product. Clients had no true ability to target specific users or repeat customers with advanced filtering of their product suites. This was one of the most requested features from clients in their calls with CSMs.

Process

Gaining a clear and direct understanding of how clients intended to use this new feature was key. Branching can be complex and it was important to simplify this feature as much as possible.

Internal/External Discovery

1) Calls with CSMs to understand what they were hearing from clients

2) Direct discovery calls with clients to understand use cases and painpoints with Journeys

Competitive Research

1) Klaviyo: Understanding how they branch off product information (name,tags, availability). Examine trigger filters and filtering of products and how they display the branch and subset branches.

2) Postscript: How are the products selected and displayed to users? What is the architecture of the branching from what triggered the journey vs. what product data the user wants to branch on.

Lo-Fis

1) Review sets of lo-fi wireframes internally as a design team

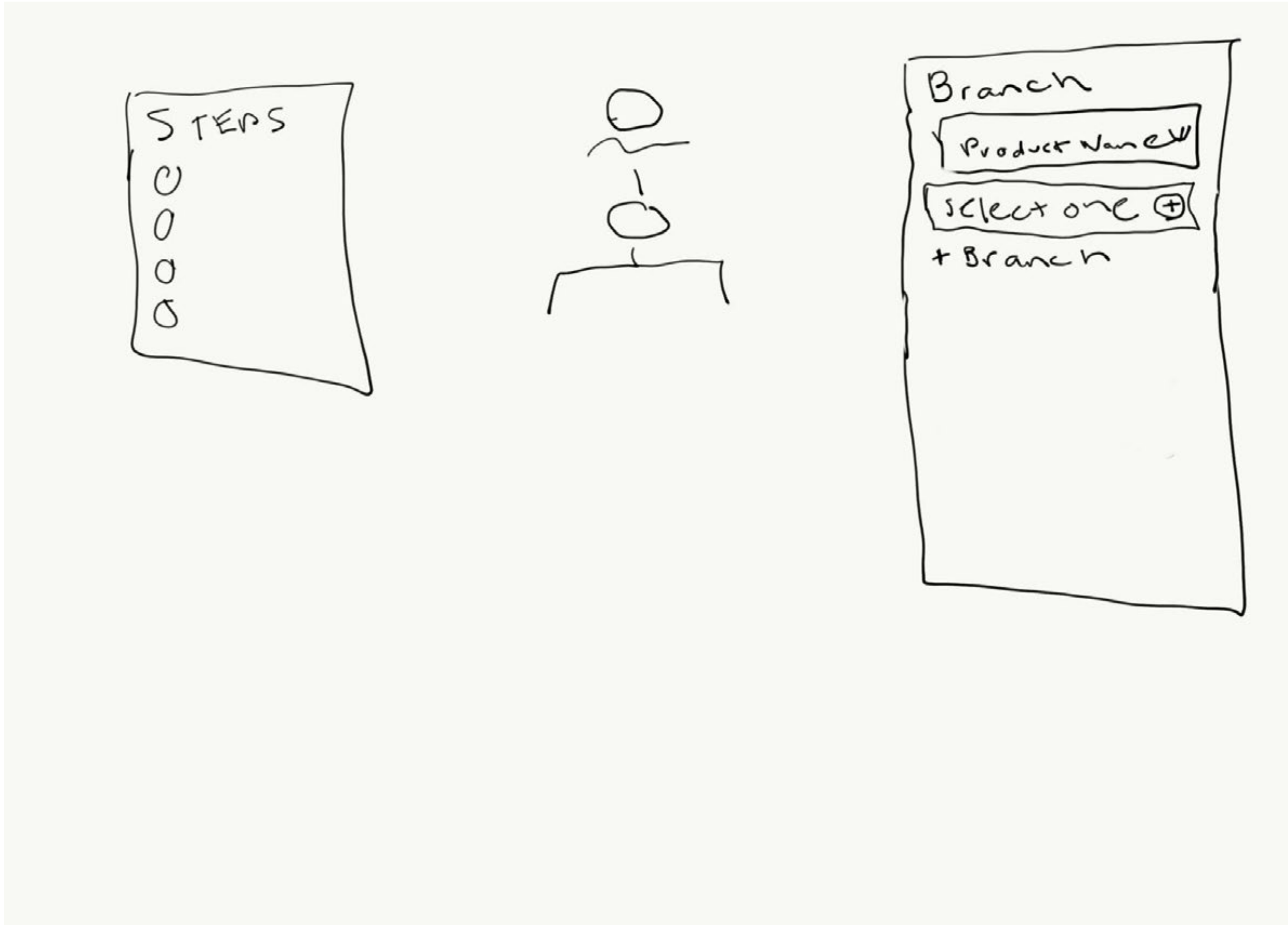
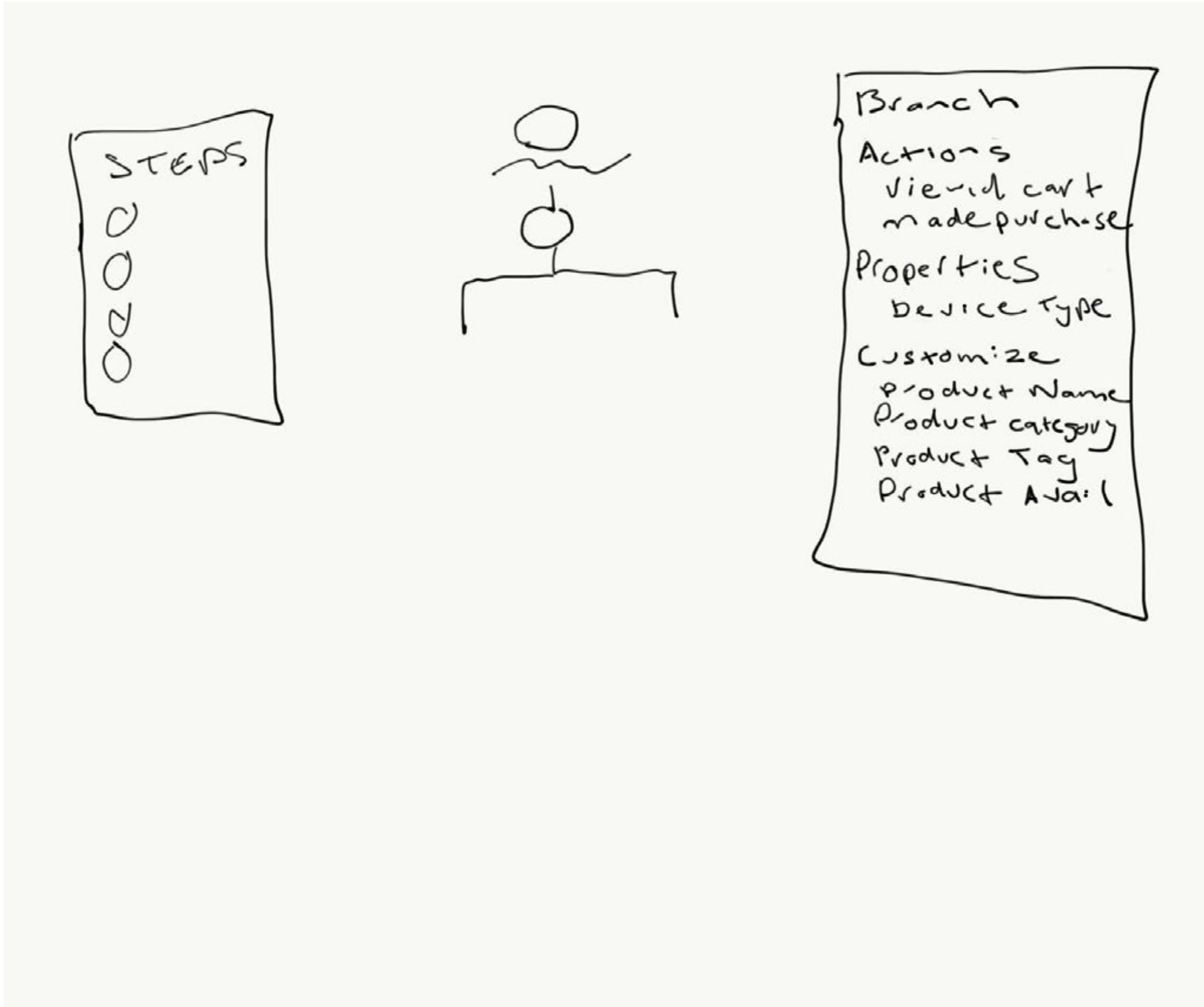
2) Engage CSMs who use Journeys frequently to gain feedback

3) Present lo-fis to business stakeholders (PMs, Eng, PMMs)

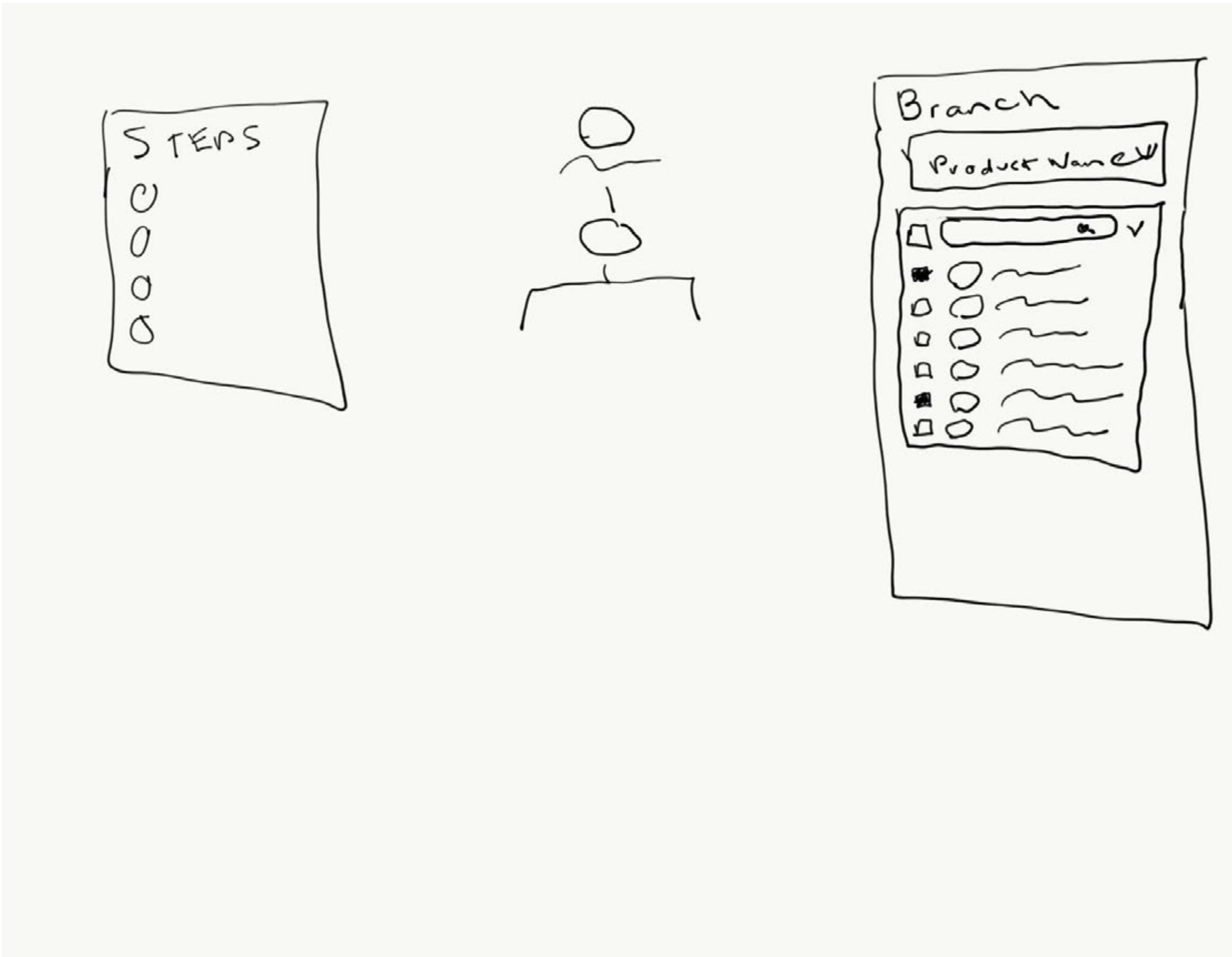
Lo Fidelity Wires

Lo-fi wireframes were created for exploration. Enhancing the current dropdowns and filtering of the branches.

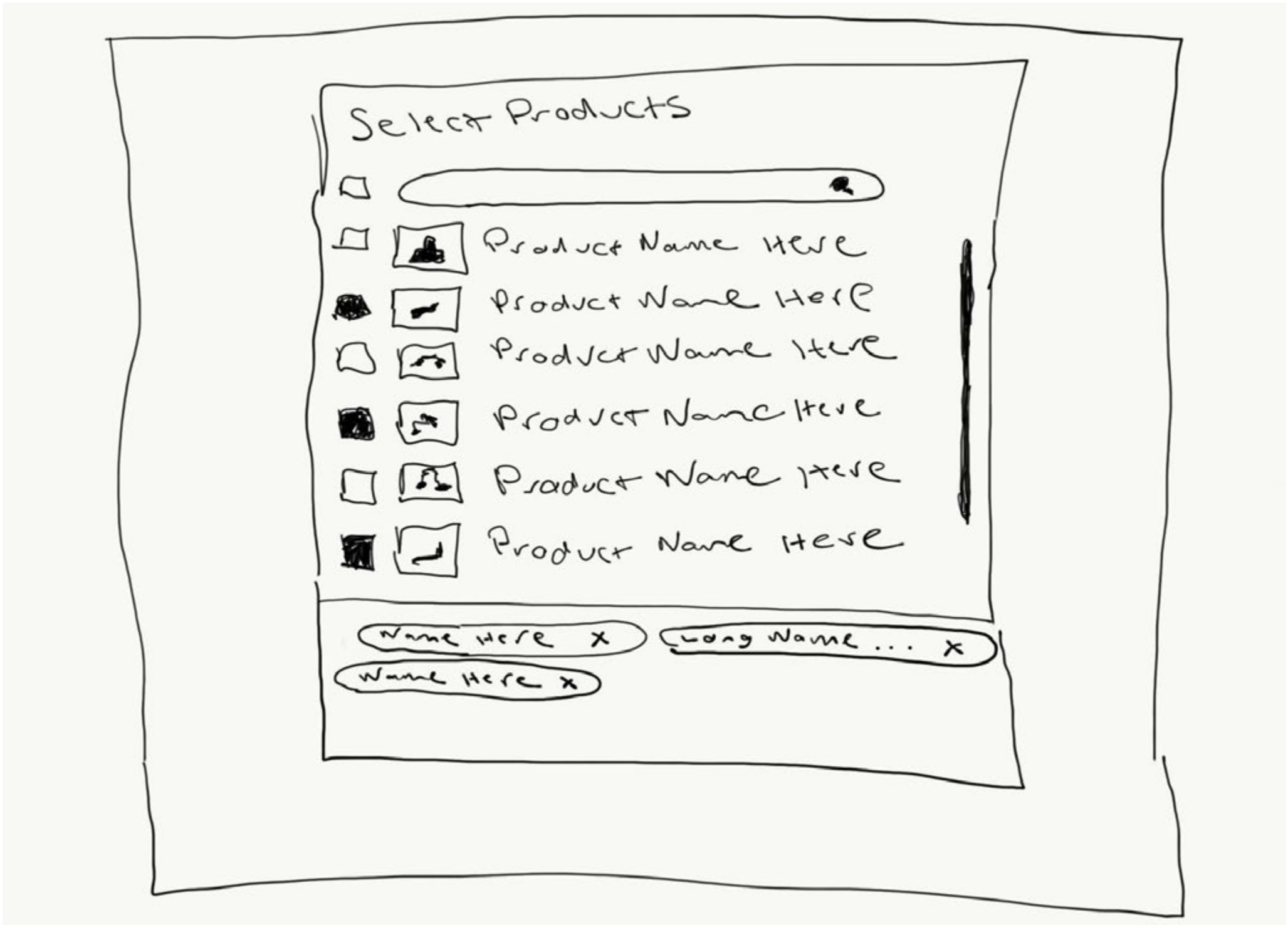
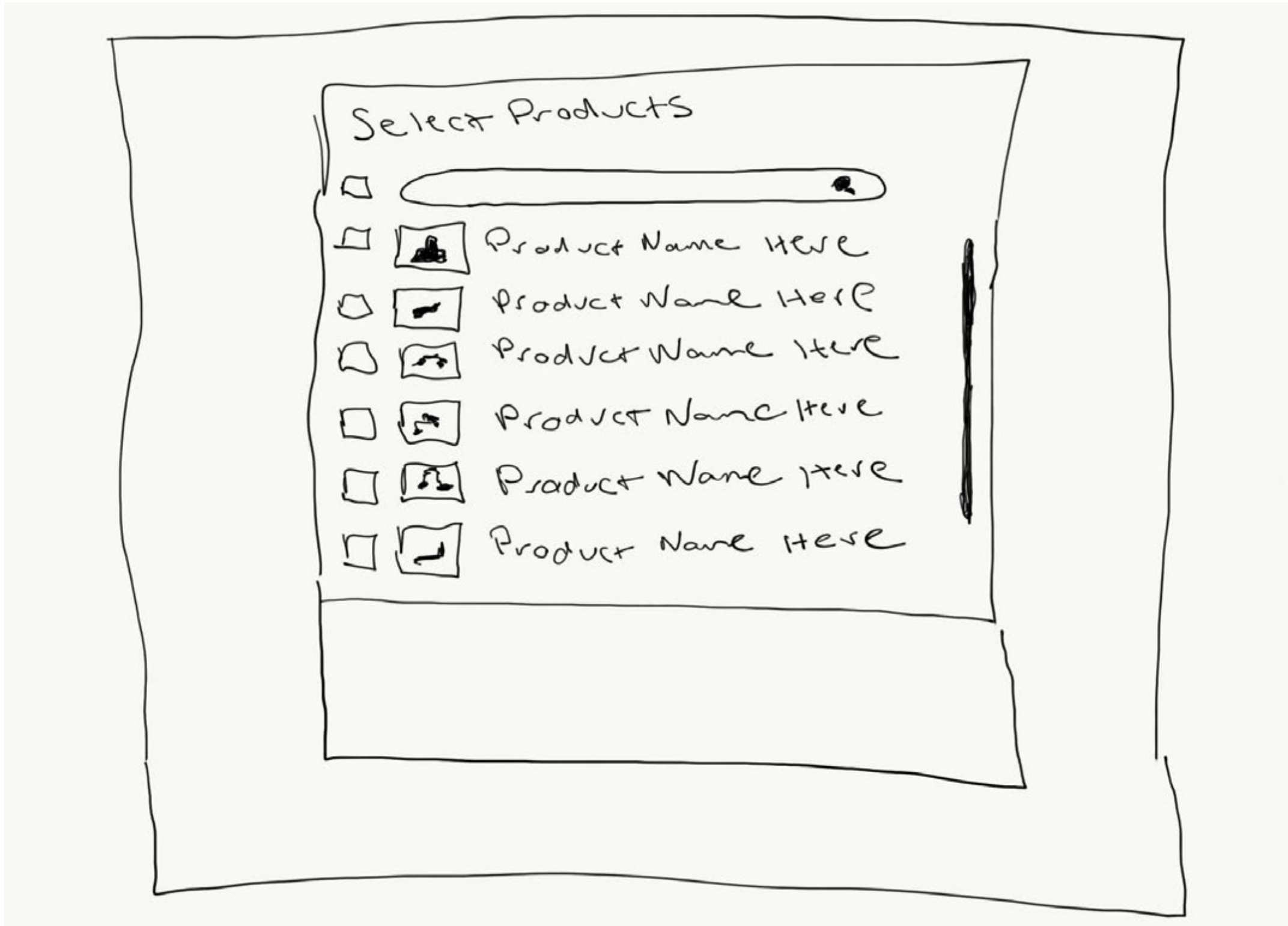
Specifically the selection of the products would be a possible new component introduced into the library. Explorations were made to determine how usable and digestable the display of the products would be in a modal vs. a dropdown.



Dropdown Product Selection



Modal Product Selection

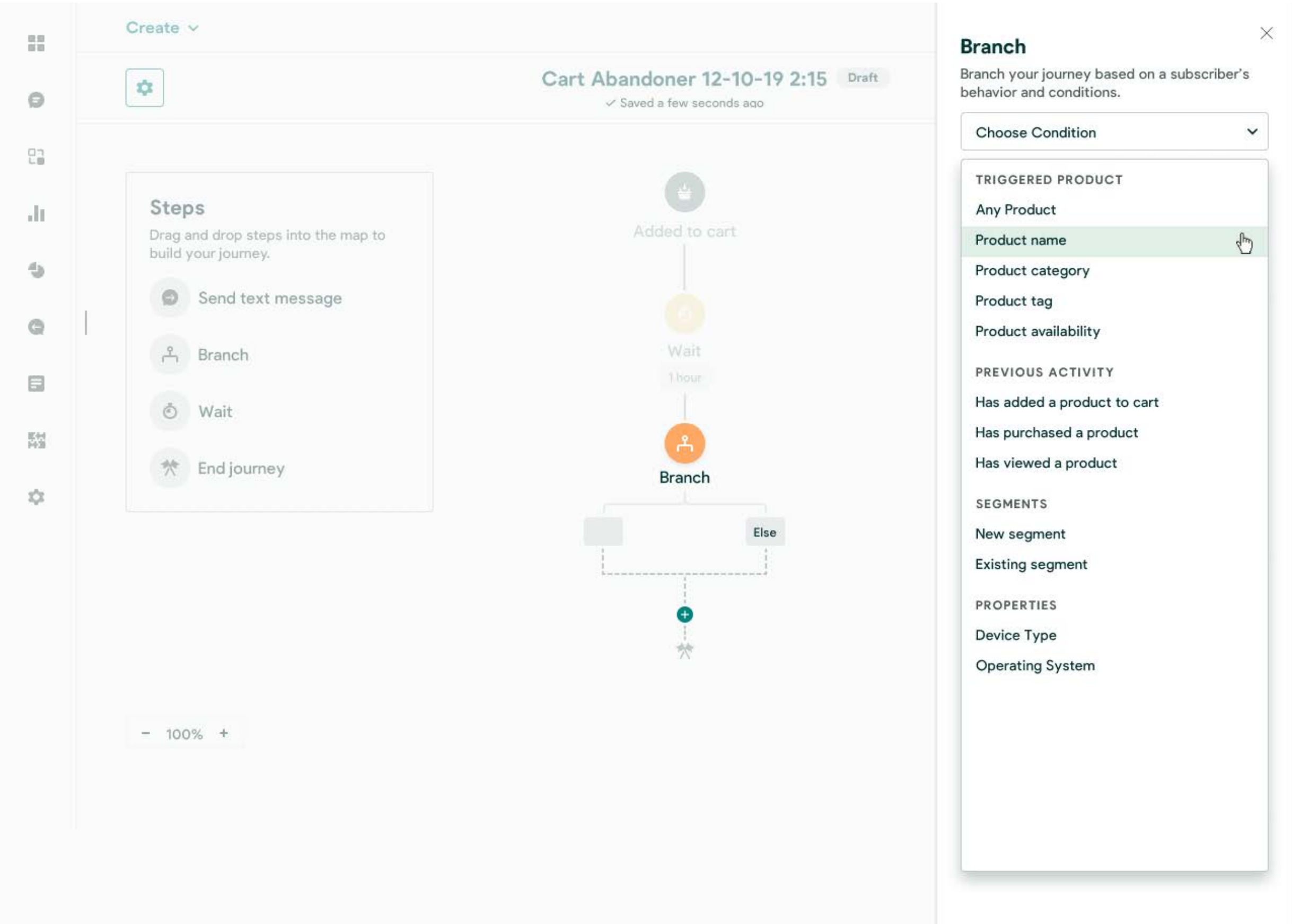


High Fidelity Comps

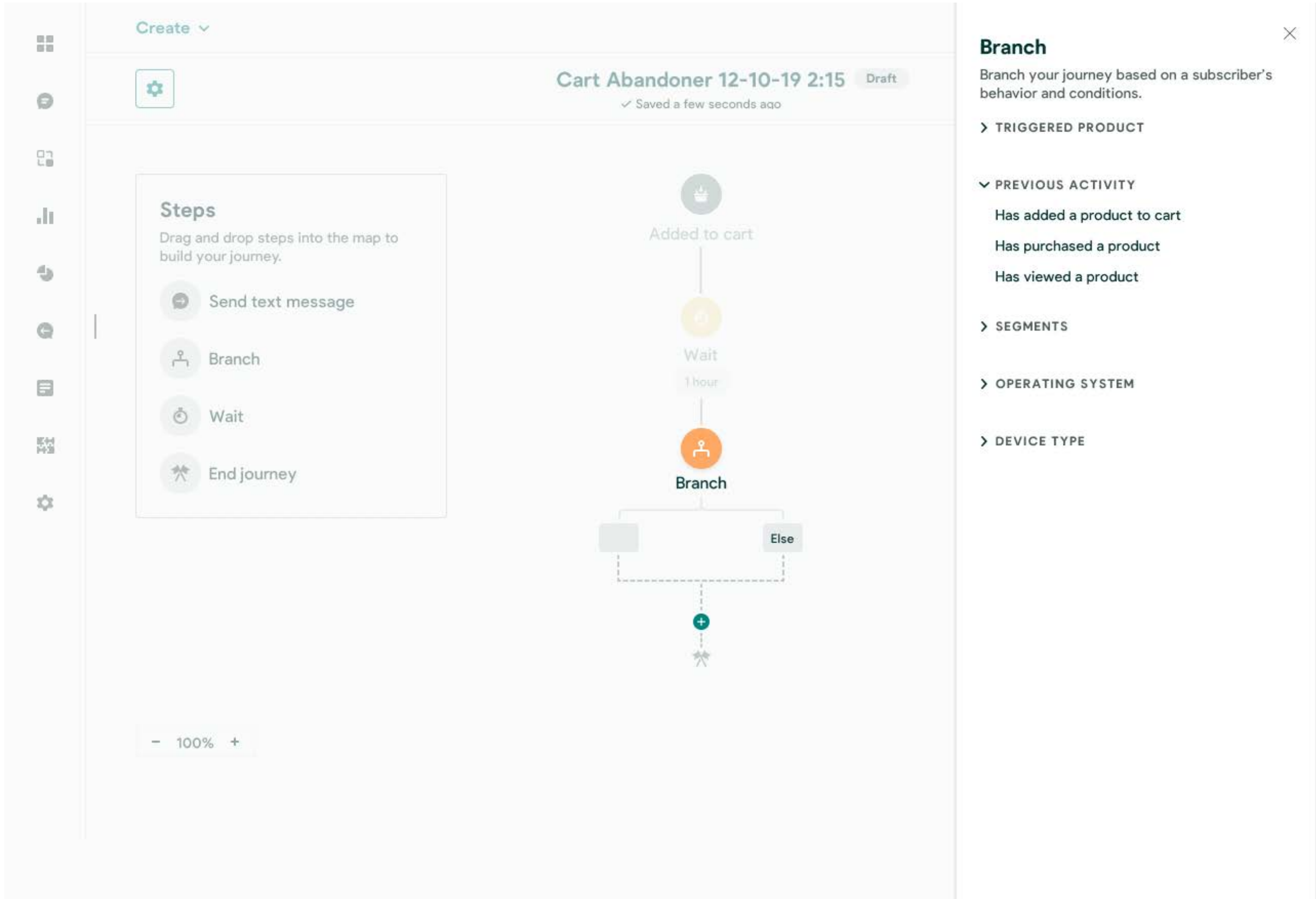
A few options for Version 1 comps were designed after internal feedback from all key stakeholders, a couple calls with CSMs and superuser clients. Explorations on the initial condition selection were designed to determine how clear the path chosen is to the end user.

A modal was selected for product selection as product names and descriptions can get pretty long. It was also proven useful for clients to have the ability to see in realtime what selections they had made and remove them instantly.

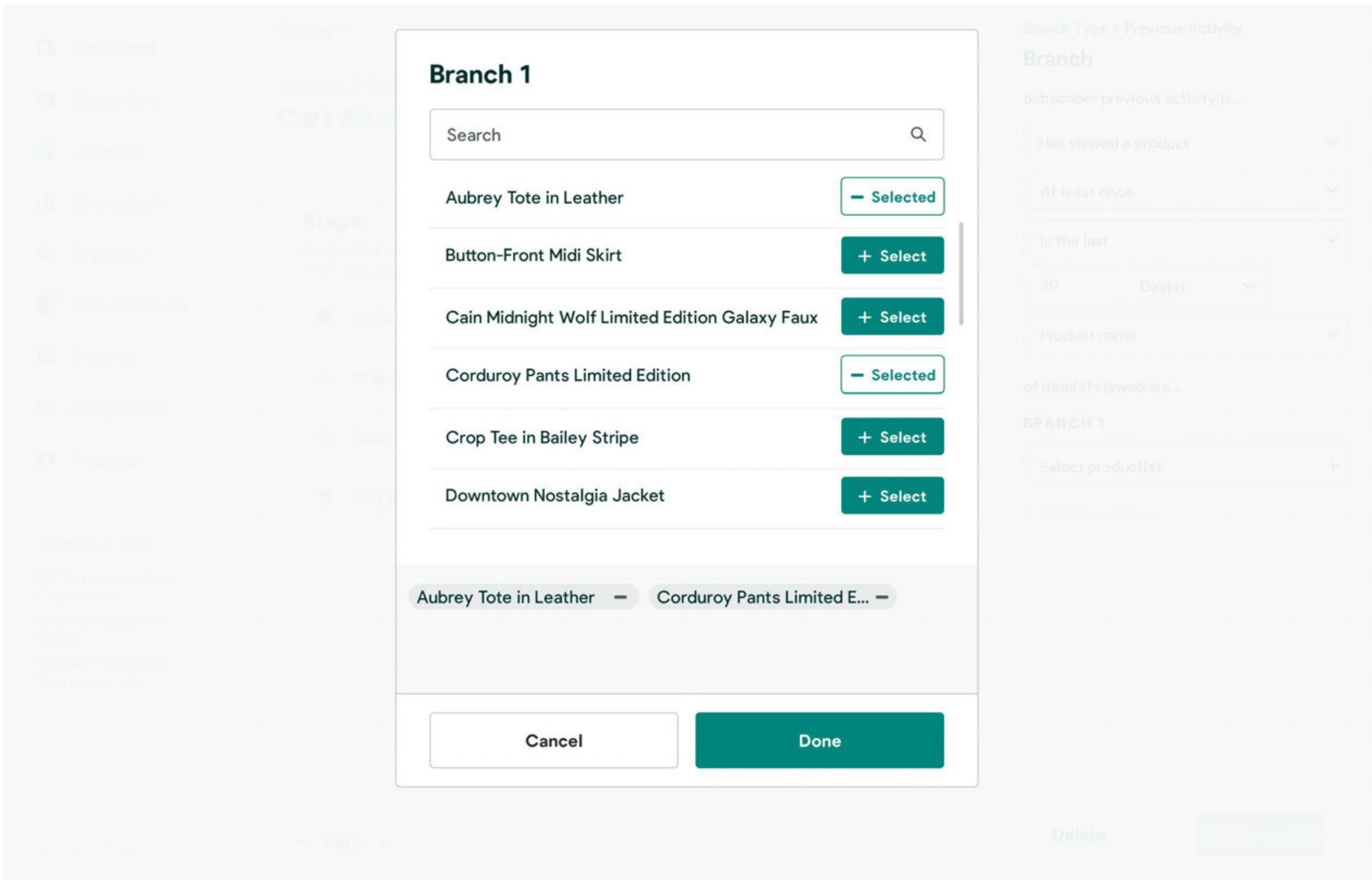
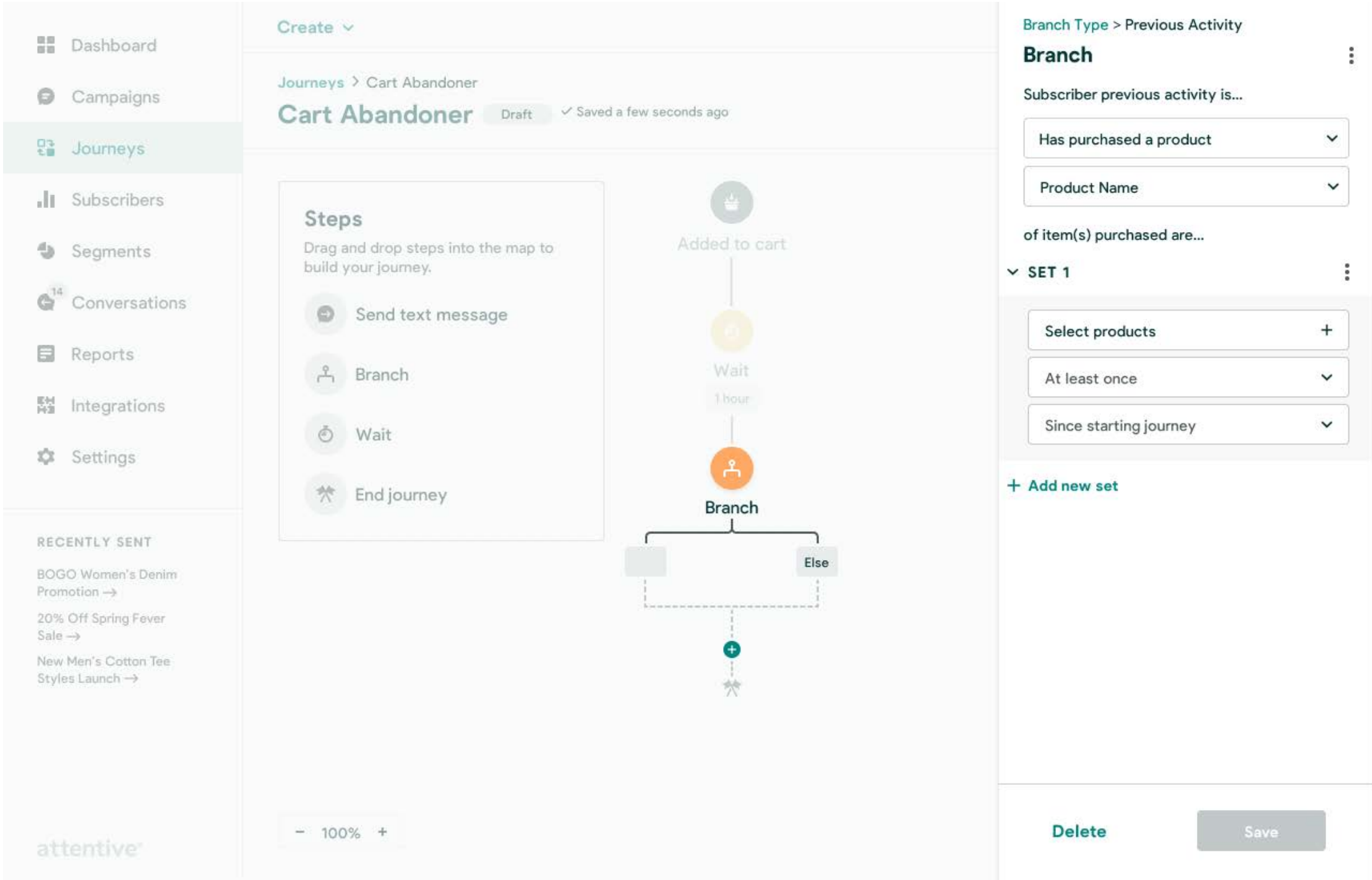
V1 condition selection



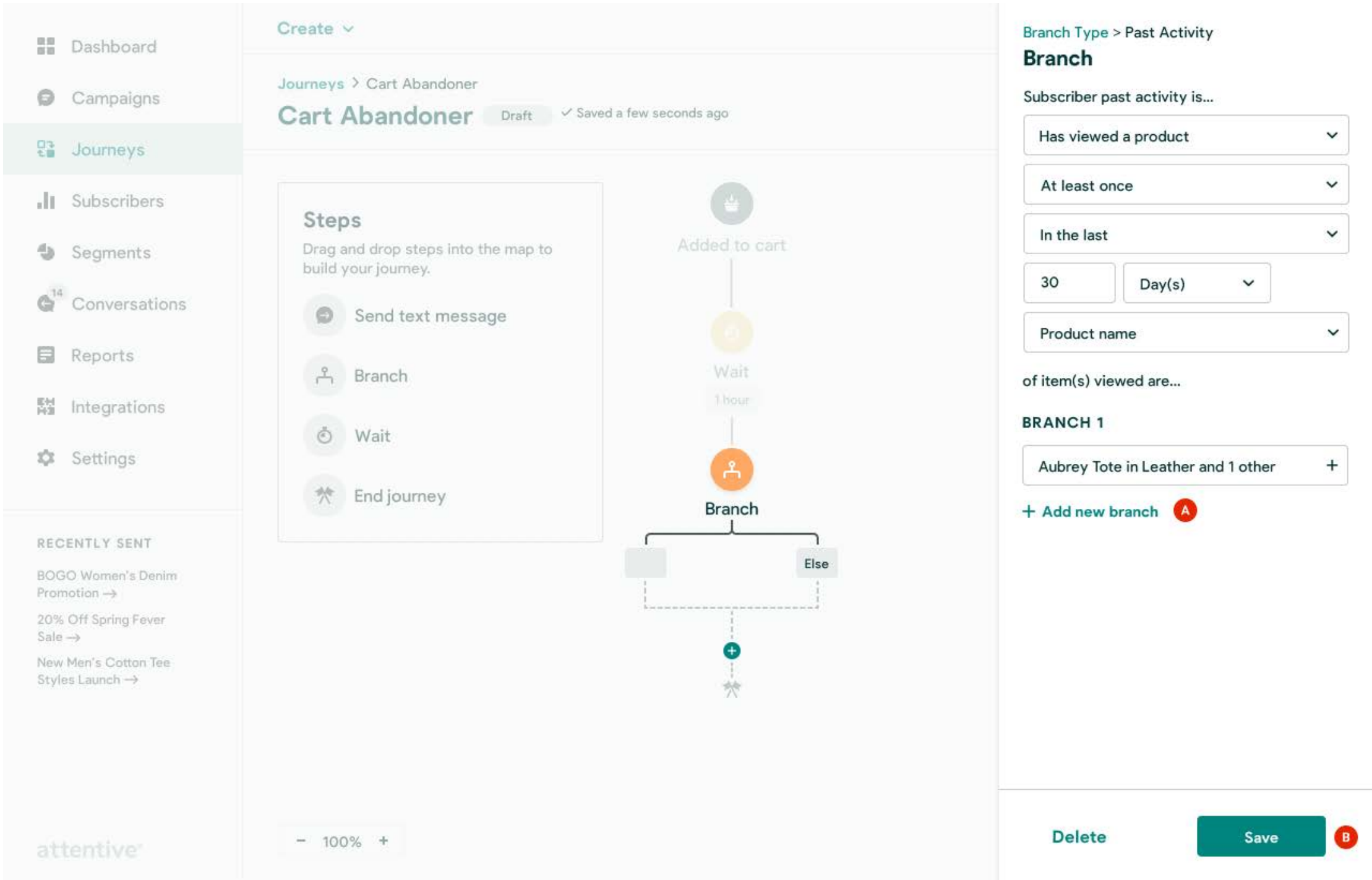
V2 condition selection



Conversational copy for branch editing and breadcrumbs to navigate back to branch type



Return to branch editing after product selections



Research/Testing Calls

Research and testing was setup for a few of our clients. A prototype was created in Figma to see how users interacted and completed the tasks at hand. Feedback was gathered at the end of each call and findings were applied to the next version of the designs and testing.

Overview

Usability testing and design validation of product data branching. Testing the flow to see if it is intuitive and clear to the end user. Exploring 3 different options for the modal that allows users to select multiple items in a long scrolling list.

Stakeholders

PM: Bruno De Martino
Design: Keenan Echols
Eng: Alex Roth, James Almeida

Business Impact

Product branching on product name, category, tags, and availability is a highly requested feature from clients. This will be a clients first look and interaction with our MVP design. Success will be measured by whether or not the client is able to complete the tasks laid out in the script.

Research questions

Summarize the assumptions you want to challenge or validate.

- Are the initial CTAs and copy for the product branching path/selections clear to the user?
- Is the client able to complete the tasks for setting up a branch?
- Is it clear to the client how to edit an existing branch once it has been added?
- Was the client able to distinguish the difference between product items that have already been added versus those that are available to be added to the existing branch?
- Is the client able to complete the tasks for setting up a branch?
- Is it clear to the client how to edit an existing branch once it has been added?
- Was the client able to distinguish the difference between product items that have already been added versus those that are available to be added to the existing branch?

Summarize what you want to learn about.

- How can the existing features be enhanced to bring more value to product branching?
- How much value would it bring to allowing the client to re-order branches?
- What visual queues are easy to digest for the client? ie: selected vs. unselected items, existing items on a branch vs current branch selections.
- Does the client prefer to see their journey while editing a branch or do they prefer to have a full overlay covering the journey that allows for more screen real estate for their selections?

Methodology

Usability Testing

Client will participate in some usability testing of a rapid prototype. After testing they will offer feedback on a list of questions while also offering preferences on 3 options for a modal with a scrolling list.

[Invision Prototype for Client Testing](#)



[Figma Prototype](#)



[Script Link](#)

 [Script](#)

Participants

Corro - Drew Rudebusch
Made in Cookware - Donald Smolik

 View the [A-list advisory board](#) member list and track when you schedule time with them using the  [Research Session Tracker](#).

 After reaching out to your participant candidates, add an entry for each using the  [Research Session Tracker](#).

What we learned & next steps


Key themes

- 1 out of 2** participants entered the correct trigger and previous activity path on the first try
- 1 out of 2** participants selected items in the modal and saved the form without confusion
- 2 out of 2** participants preferred the selected tags view in the modal
- 2 out of 2** participants believed naming branches would add value
- 1 out of 2** participants preferred the condensed version of the form for setting up branches
- 2 out of 2** participants said alerts/notifications would be beneficial to guide and confirm selections

1) Ability to name branches


Both clients thought that there would be value in naming each individual branch. This could prove beneficial in reporting and better identifying how each branch performed. There could be some confusion in the Journey tree as to the prioritization of each card/branch. Adding the names/labels within the journey could solve for this.

Naming of branches should be explored. Adding additional subset branches to a main branch could get confusing as to what items live within each pod. When adding a branch should any additional branch pod under that main branch be named "branch"?

 **Next steps:** Explore designs for naming of individual branches and labeling them within the Journey's tree


2) Filters in modal

Advanced filtering in the modals is highly desired. Having the ability to drill down their searches by vendor/brand, colors, size, etc... would bring huge value. This should be explored post MVP as a solution to allow for not only more customized branches but faster productivity in finding items to group together in a branch.

 **Next steps:** Explore designs for advanced filtering within the modal. Allowing users to drill down their product names by vendor/brand, color, style, etc..

3) Allowing for unique timeframes/recency per branch

Each participant would find value in having each branch card have its own timeframe. As it stands now there is one timeframe per "Top Branch". The subset branches of this branch could have their own individual timeframes attributed to them. ie: Subset Branch 1 is Product Name 1 and viewed at least once in the last 20 days, Subset Branch 2 is Product Name 2 and viewed at least twice in the last 10 days.

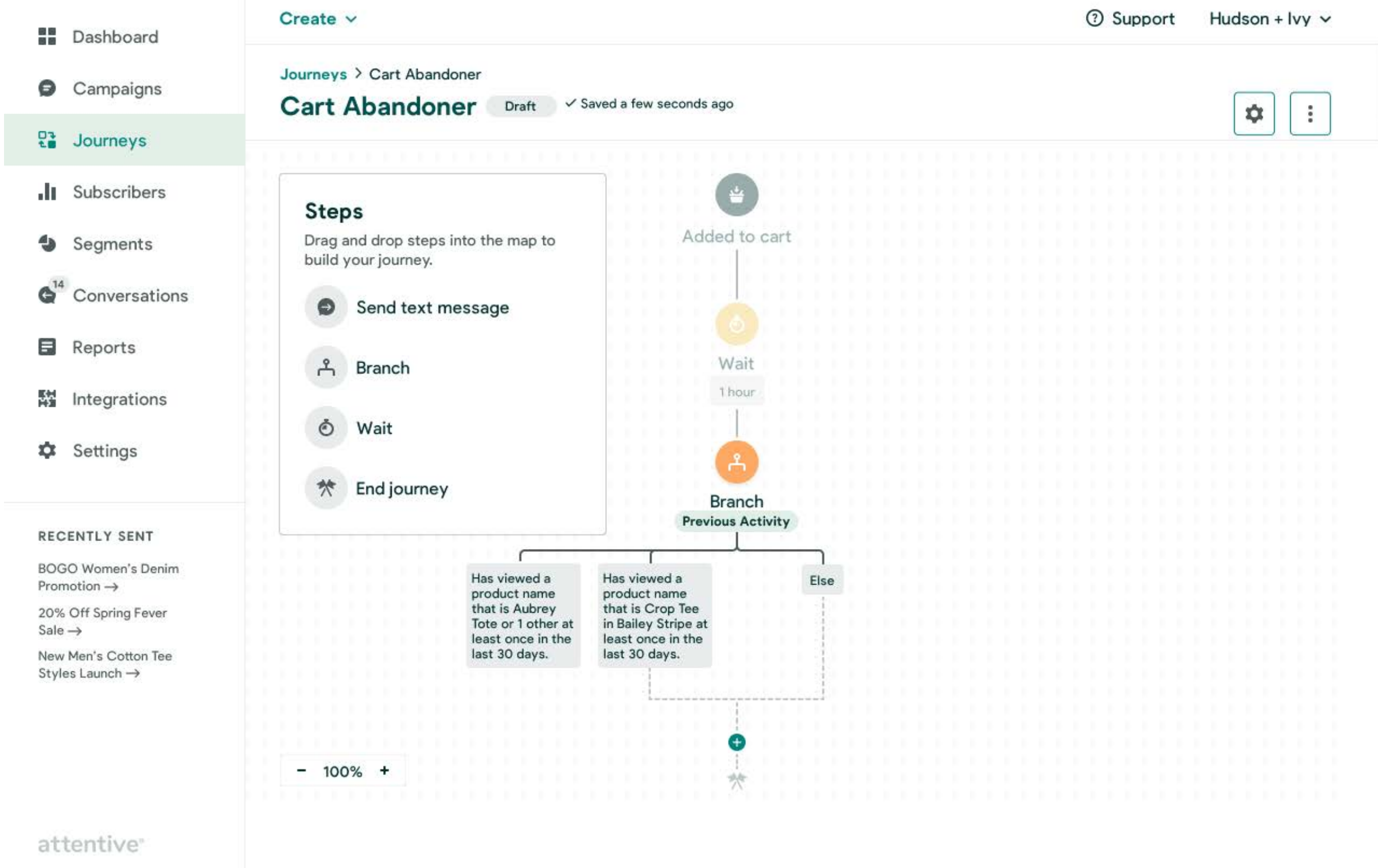
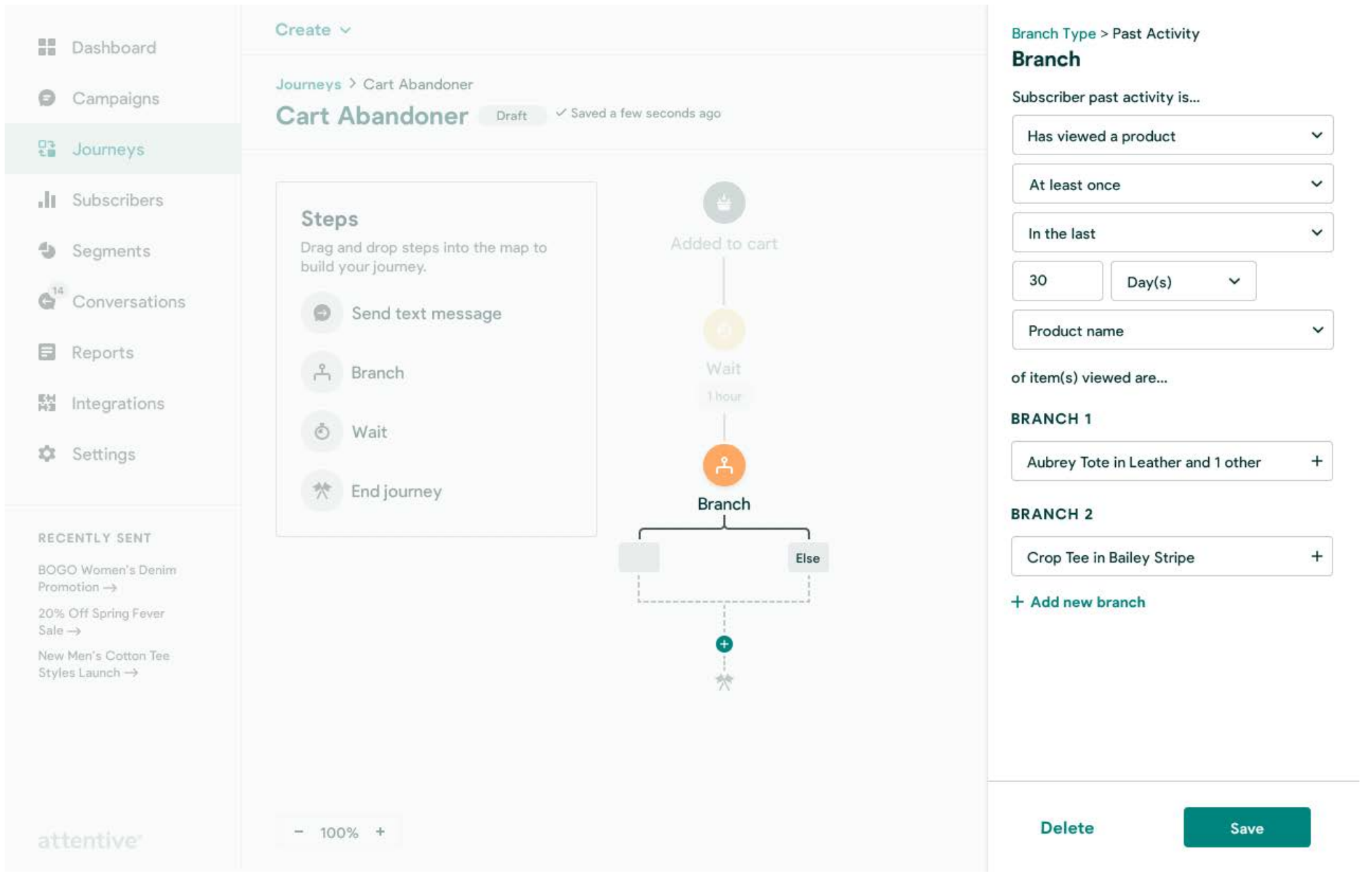
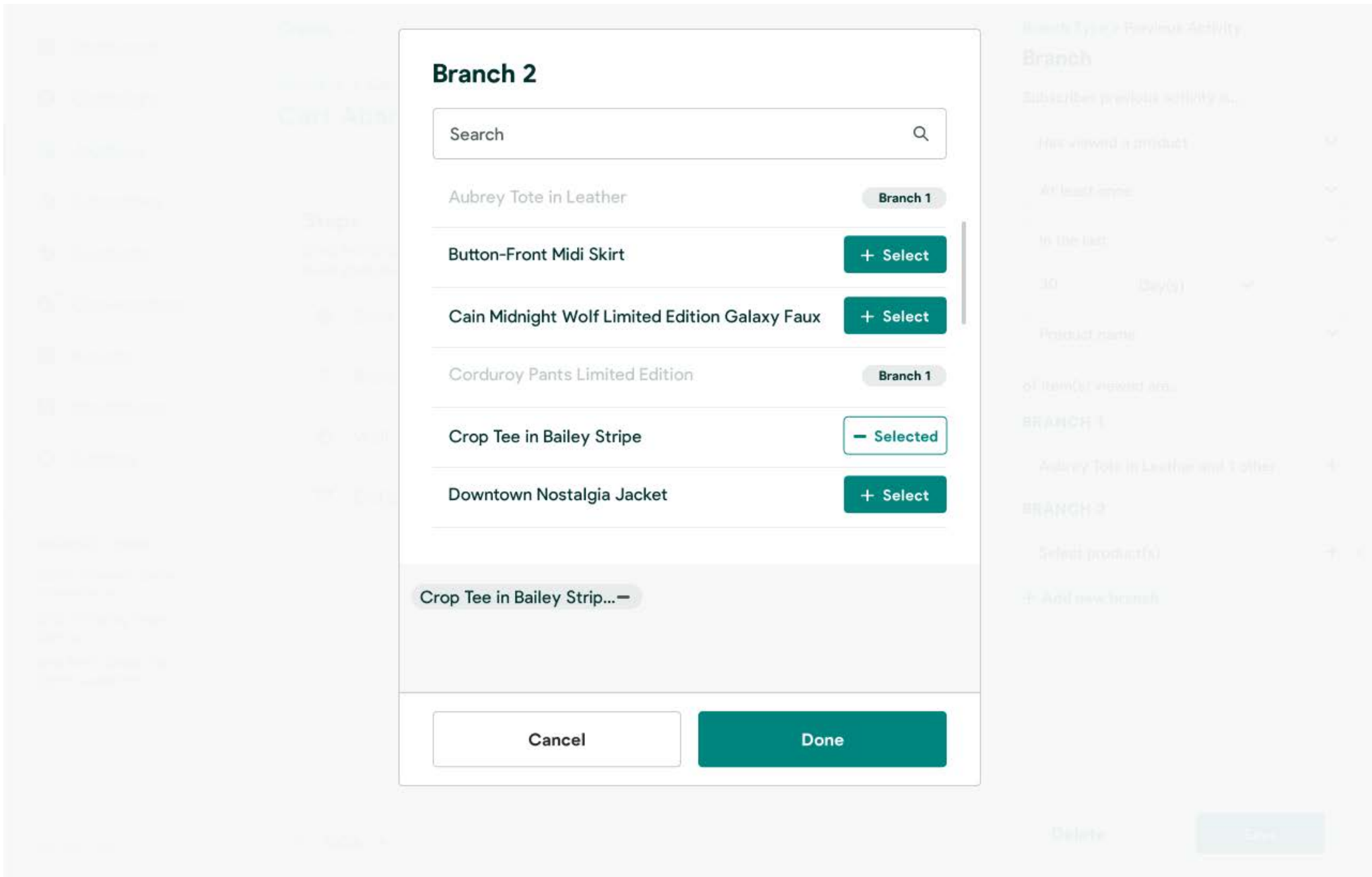
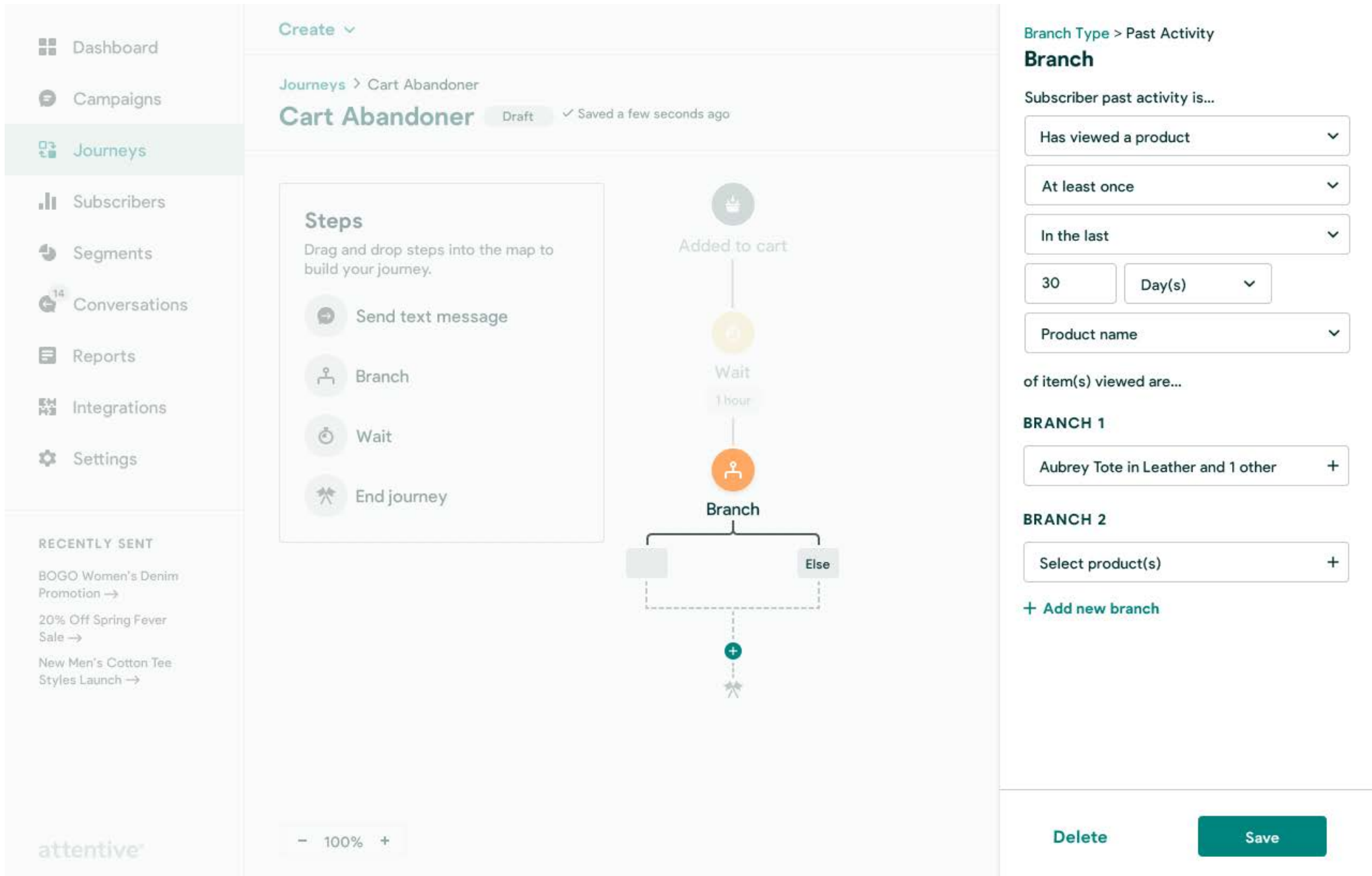
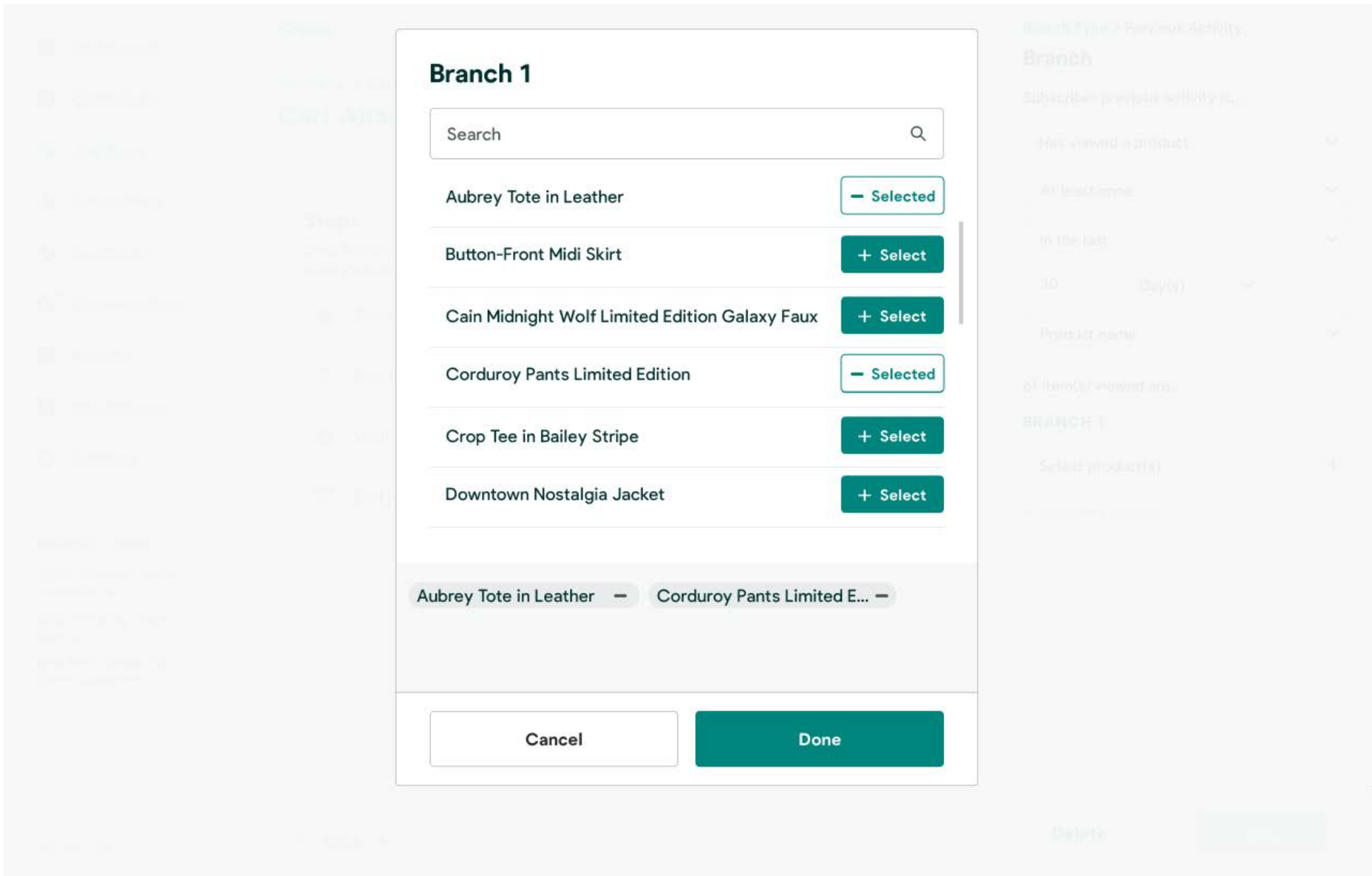
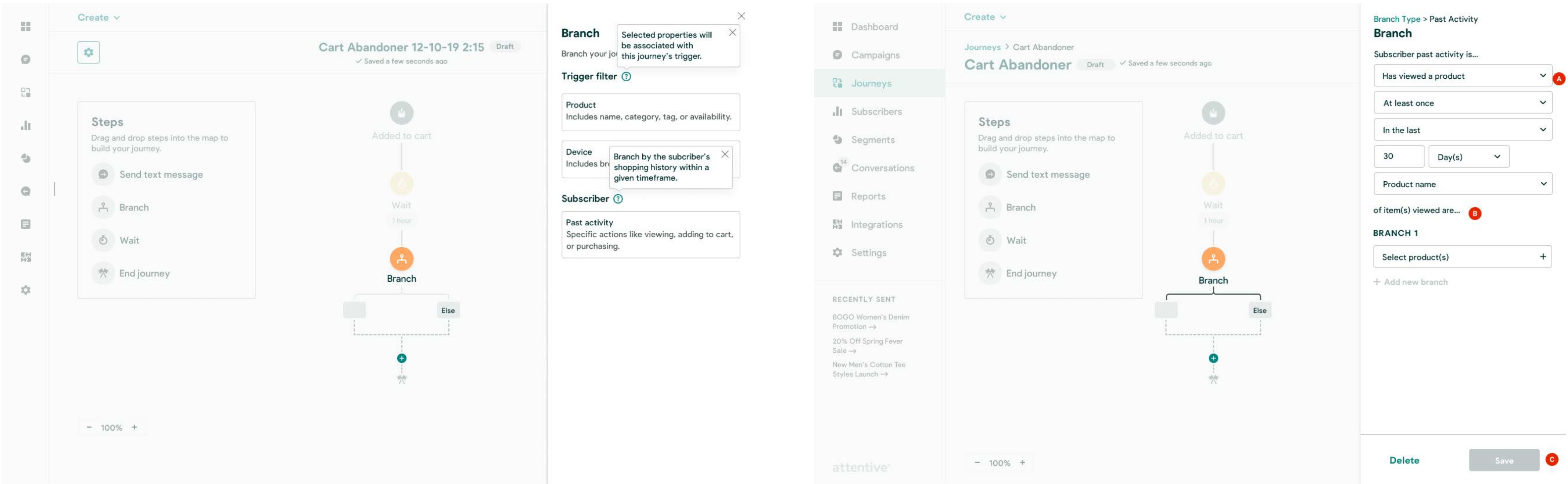
 **Next steps:** Re-design the flow to have the timeframe selection live within each sub-branch and not the "Top Level Branch"

Other next steps

- Work on a plan and user stories for post-mvp features to enhance branching
- Explore the modal design deeper with selected tags/items. This version was preferred
- Explore designs for inline notifications when items are being moved or added in the branch
- Work on verbiage of paths to better convey a direction that is chosen
- Explore adding "or" as an option as opposed to strictly "and" when selecting product branches

High Fidelity Comps v2

After a round of testing and some additional internal feedback the designs for the product condition selections were altered. We werent able to get as many clients to test in R1 as we would have liked. There was some friction and confusion from CSMs as to branching by product data or branching by the historical/past activity of clients. Cards were presented in this design to offer more context to the end user.



Pre-Beta Usability Testing

Research and testing was setup for a few of our clients. A prototype was created in Figma to see how users interacted and completed the tasks at hand. Feedback was gathered at the end of each call and findings were applied to the next version of the designs and testing.

Overview

Usability testing and design validation of product data branching. Testing the new flow to see if it is intuitive and clear to the end user. Comparing the two flows to identify which one the clients prefer.

First Round Plan:

 [➤ Previous Activity Branching R1](#)

Stakeholders

PM: Bruno De Martino
Design: Keenan Echols
Eng: Alex Roth, James Almeida

Business Impact

Product branching on product name, category, tags, and availability is a highly requested feature from clients. This will be clients first look and interaction with our MVP design. Success will be measured by whether or not the client is able to complete the tasks laid out in the script.

Research questions

Summarize the assumptions you want to challenge or validate.

- Are the initial CTAs and copy for the product branching path/selections clear to the user?
- Is the client able to complete the tasks for setting up a branch?
- Is it clear to the client how to edit an existing branch once it has been added?
- Was the client able to distinguish the difference between branching from a trigger based product and adding a branch for historical data.

Summarize what you want to learn about.

- How can the existing features be enhanced to bring more value to product branching?
- How much value would it bring to allowing the client to re-order branches?
- What use cases do the clients have for establishing a historical branch that branches from a trigger based branch?
- Is there a strong use case for allowing for different timeframes for each individual branch that lives within a main branch. ie: Branch Added > Branch 1 (timeframe is X), Branch 2 (timeframe is Y)

Methodology

Usability Testing

Client will participate in some usability testing of a rapid prototype. After testing they will offer feedback on a list of questions while also offering preferences on 2 options for the historical/trigger branching flows.

Trigger Filter Prototype | [Script Link](#)
[Product Filter at top level Trigger](#)

Prototypes for Branch Types w/ no Trigger Filter at top level

 [Script](#)

 Add cover  Add comment


What we learned & next steps

Key themes

- 2 out of 3 participants entered the correct trigger and previous activity path on the first try
- 2 out of 3 participants selected items in the modal and saved the form without confusion
- 3 out of 3 participants preferred the selected tags view in the modal
- 3 out of 3 participants believed separating the branch types with headers was clear
- 3 out of 3 participants said alerts/notifications would be beneficial to guide and confirm selections
- 3 out of 3 participants said the subtext added into the branch types made the path clear


1) Trigger Filter

The trigger filter at the top level was clear to the users. It created a visual hierarchy and allowed for the journey to be read clearer. Users worked through the trigger settings quickly and efficiently. All the CTAs were clear to the users and they completed the tasks in both rounds of testing once into the form fields.

 **Next steps:** Confirm with Eng if we are able to support a trigger filter at the top level.


2) Different Timeframes Within Subset Branches

When adding a branch users have the ability to add a max of 5 branches under that main branch. Although in Round 1 a couple users mentioned the desire to add different timeframes that flow did get rather confusing in Round 2 testing. It was confirmed with the user and CSMS that it makes most sense to allow for a single timeframe for every subset branch that lives within a branch.

 **Next steps:** Update designs to reflect the selection of a single timeframe for every branch that lives under the main branch node.

3) Reordering/Prioritization & Alerts

A common theme between Round 1 and Round 2 of testing is the ability to name branches and to reorder branch nodes so that users can have a sense of what the prioritization is amongst them. Users would like the ability to drag and drop to reorder. They mentioned it would also be beneficial within the form to know what branch takes priority for crossover products. Allowing for naming the branches would allow for a clearer understanding of what products they have added to a branch. Branch 1, Branch 2, Branch 3, etc... is not very clear especially when it comes to reporting.

 **Next steps:** Explore designs to name branches. Explore notifications or alerts that guide or instruct the user as to what products/branches will take priority.

Other next steps

- Work on a plan and user stories for post-mvp features to enhance branching
- Explore designs for inline notifications when items are being moved or added in the branch
- Explore adding "or" as an option as opposed to strictly "and" when selecting product branches
- Explore the breadcrumbs in previous activity. They werent clear to a couple users that you could navigate back to the branch type step.

Solution Post Beta

Although the V2 designs tested really well with the client pool there was some friction when the product was released into Beta. During our testing we were unable to get responses from some of our users who weren't as advanced with our product. Overall the beta performed well with increased CTR, CVR, and revenue spikes for a few of our clients.

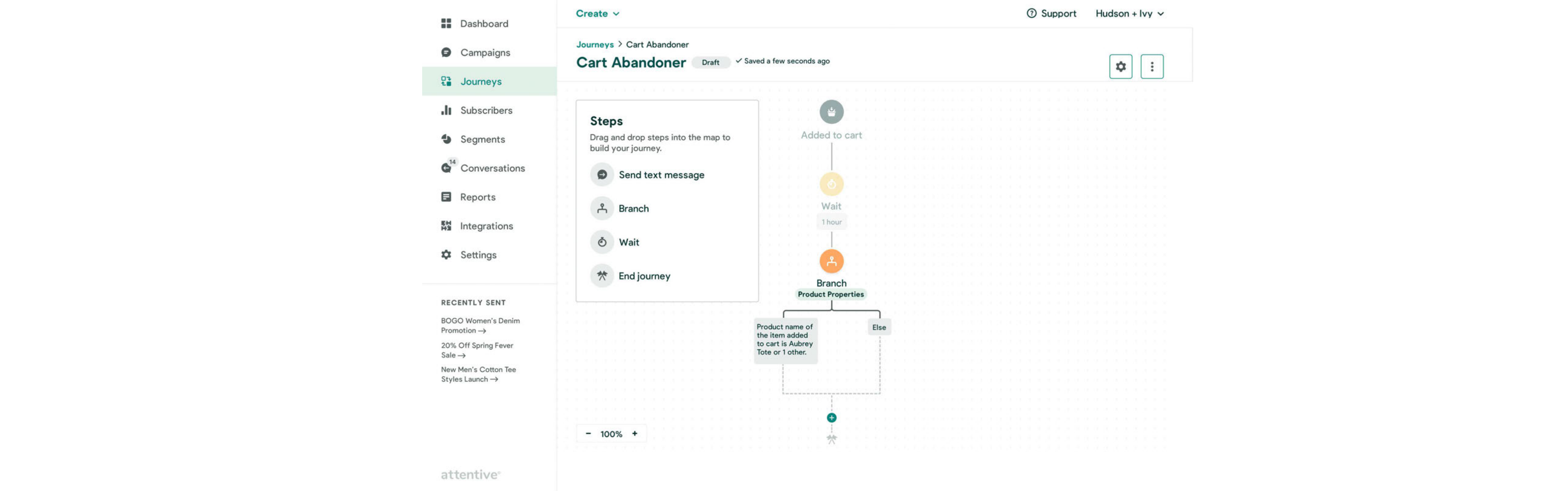
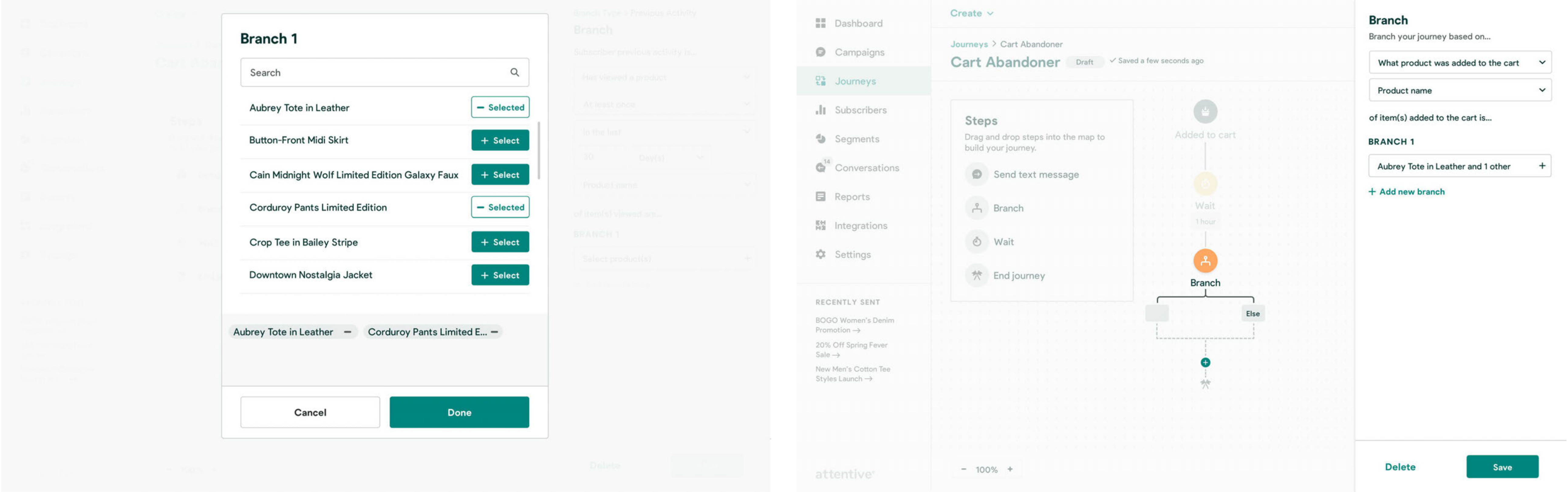
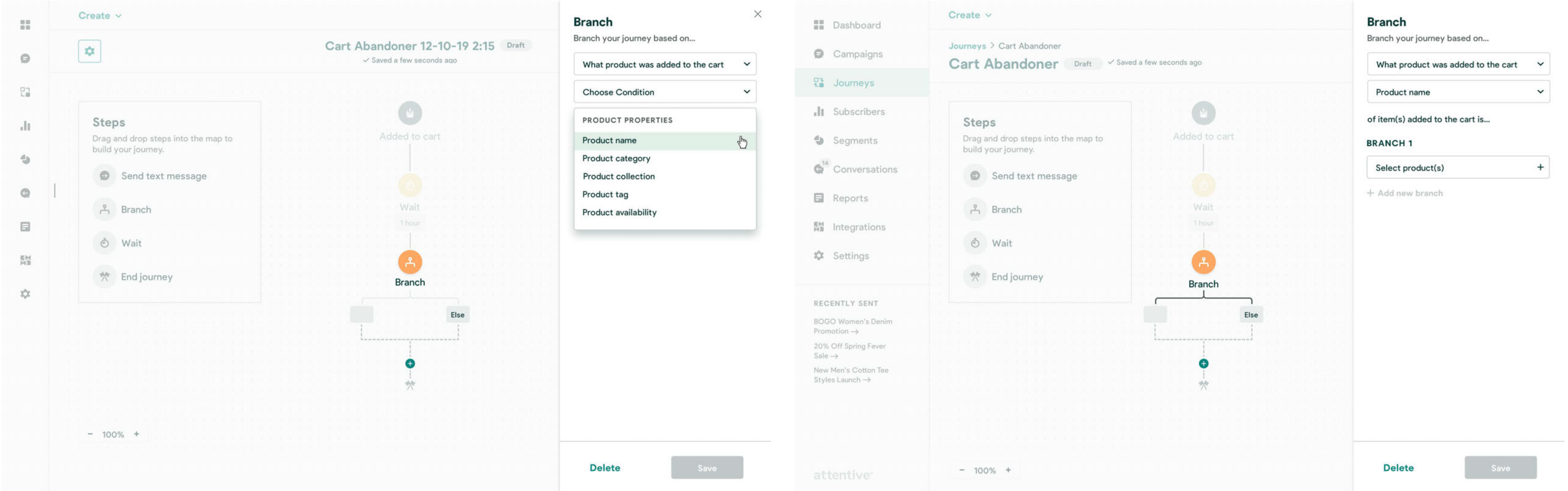
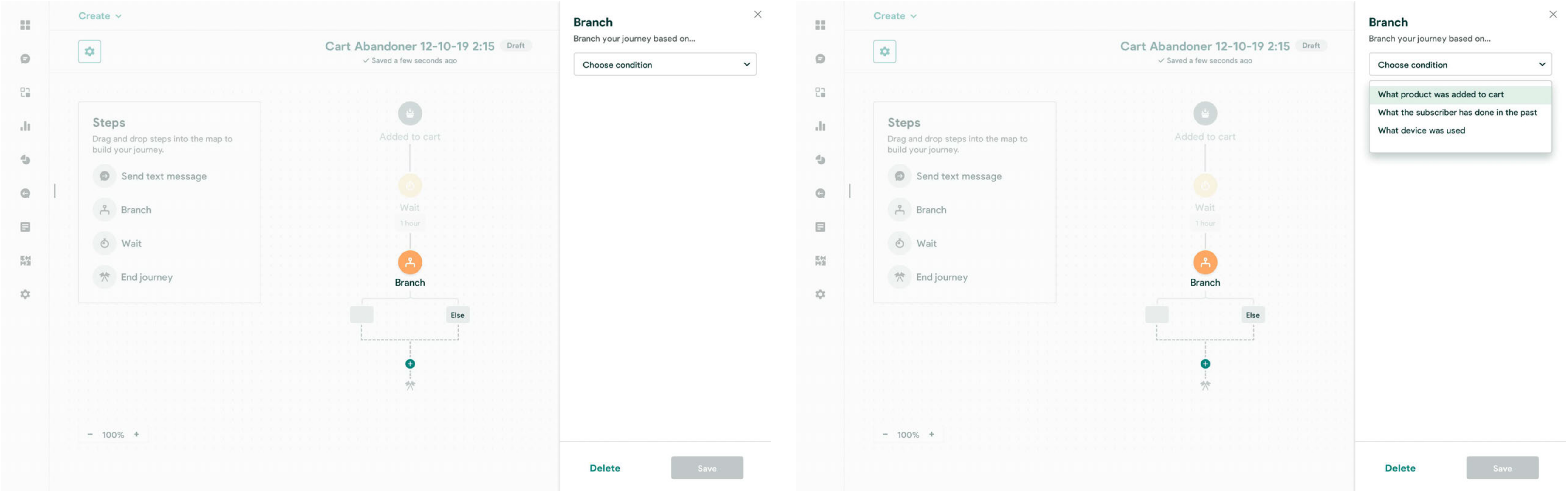
We decided to pivot on the designs one more time before we GA'd it as internally we weren't comfortable with the set of clients who still had difficulty grasping the difference between branching by product data (triggered item) vs. the historical shopping habits of their customer.

The goals that were set were to ensure:

- 1) Initial product condition and path of selections were clear and concise
- 2) Reduce the amount of copy or tooltips needed
- 3) Lead the user down a desired path by telling a story of their customers Journey
- 4) Reduce the amount of time clients spent with CSMs for onboarding or help with setting up Journeys

Final Solution

After internal discussions with key stakeholders and discovery from our Beta designs we landed on the below final designs. These designs were tested with some of our less tech savvy clients and performed very well. In order to ship a product feature that is usable by all levels of users we landed on this as the best case solution. There is a clear conversational tone when setting up your branch that was easily digestible by all levels of clients.



Conclusion

The MVP was shipped with conversational tone and dropdown approach to product data selection. Clients on average within the first month saw their clickthrough rates increase by 54% and their conversion rates by 36%. Our short term data did show a spike in clients who were setting up their own journeys/branching without CSM assistance.

Feedback was positive from the users who are using the MVP version. We setup several calls to gain additional insights as to what was working and how we could continue to scale the feature.

Weaknesses

I would have liked to explore the initial designs in more details with a larger pool of clients. We weren’t able to get the feedback we wanted early on because of this. One of the technical issues we had was the code did not allow for us to setup a trigger filter on initial launch. So therefore in essence a repeat layer of filtering was added on. Additional time and resources to explore and code for this enhancement would have been welcomed.

Overview

This will be our research plan for our Beta release of trigger based branching. Clients will now have the ability to filter/branch their selected trigger by product name, category, tag, or availability. We will use this beta version to validate the intuitiveness of the flows and the value it has brought to our clients.

Stakeholders

Journeys Design - @Keenan Echols

PM - @Bruno De Martino

Business Impact

Research questions (onboarding call)

Setting up

- Which branching on product data use cases do you have in mind?
- [Hands on] Could you please try to set this up in Journeys, while sharing your screen?
- Was setting up your branch and filtering by product properties intuitive?
 - Was there anything that was confusing or misleading in the flow?
 - Were you able to setup your branch successfully?
 - Was it clear that additional branch pods could be added under your main branch?
 - Did you have any issues removing existing branch pods or was it clear how to achieve this action?
- Where you able to select your products without any issues?
 - Was the modal intuitive when selecting multiple items?
 - Were you able to see clearly see in real-time your selections and remove them instantly?
 - When opening a new branch pod was it clear which items could not be selected (they already exist on another pod) to your new branch pod?
- Was it clear how to save your branch?
 - After selecting your items within the modal (popup) did you know to select save so that your branch items would be saved and added to the journey?
- [Hands on] Can we add an 50% A/B test to test performance between the old flow you had and the new flow? We will discuss changes in CTR/CVR in our wrap up call in Jan

Conversation

- Can you describe in your own words the difference between the Subscriber and the Trigger Filter options?
- Can you describe the value branching adds to your marketing strategy?
- How do you plan to measure the success of branching?
- What other branching functionality would you like to see?
- How important to you is it to be able to branch on previously created segments?

Research questions (debrief call)

- What has your experience been with branching on product data so far?
 - What's working well? What could be better?
 - Do you consider this an easy-to-use feature?
- Have you added any other branches on product data since our intro call?
- What are your thoughts on the performance comparison between our A/B test?
- Do you plan to keep branching on product data in your Journeys?
 - If yes, how do you plan to measure the success of branching going forward?

Methodology

Qualitative Interviews

We will setup a few client calls to run through their experience with branching on product data. The above questions will be asked to gather feedback and insights on the feature.