Community

From Concept to Conversion: Boosting Campaign Engagement by 32% with SMS Workflows

Problem Statement
Without automated, segmented messaging, users couldn't deliver personalized experiences at scale, directly impacting retention and engagement.

Role
Senior Product Designer

Key Achievement: Increased average CTR for customers by 32%

Community (Automations)

Challenge

Building a **multi-vertical automation** feature that balances functional flexibility with a **simple, transparent UI** that helps users **visualize** complex workflows.

Team

Senior Product Designer (Myself), Product Manager, BE engineers, FE engineers

Scope/Constraints

To accelerate V1 delivery, we narrowed our focus to **high-impact revenue-driving triggers**. This lean approach allowed us to deliver **immediate value and gather critical user insights** while positioning the product for long-term scalability.

Discovery

The Engagement Gap: Identifying the CTR Plateau in Manual Campaigns

Collaboration: PM, Eng

The Opportunity: A Looker analysis revealed that manual campaigns averaged a **14% CTR**, signaling a significant engagement gap.

However, segmented campaigns saw performance jump to **26%.** This **12-point increase** confirmed that granular targeting and personalization were the primary drivers for improving customer retention.

The Engagement Gap: Manual vs. Segmented SMS

Average Click-Through Rate (CTR %)

- Manual Campaigns: 14%
- Segmented Campaigns: 26%
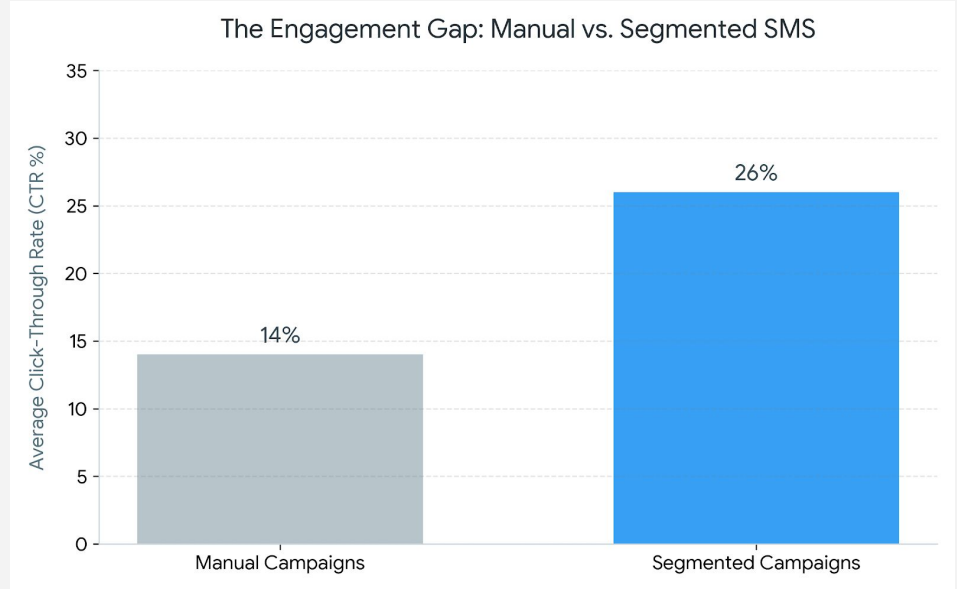
Understanding the Friction: The User's Story Behind the 14% CTR

Collaboration: PM, UXR

To understand why manual campaigns were underperforming, I conducted a series of interviews with 16 users across multiple verticals. While the data pointed to a lack of segmentation, the qualitative feedback revealed the **barriers** preventing it.

9 out of 16 users use Mailchimp
2 out of 16 users use Klaviyo
1 out of 16 users use Autopilot
1 out of 16 users use Attentive
1 out of 16 users use ActiveCampaign
3 out of 16 users use Hubspot

12 out of 16 users use email automation
10 out of 16 users use SMS automation or want to use
3 out of 16 users have hesitation their users will use SMS
7 out of 16 users have Shopify
7 out of 9 Mailchimp users find it user friendly

9 out of 16 users would like/use Abandon Cart trigger
13 out of 16 users would like user historical activity filters
7 out of 16 users would like birthday trigger
15 out of 16 users would like to put users into a sub-community/segment in a journey

Filters

"Winback a customer who hasn't been active would be cool. Being able to send an incentive coupon is always good"

Segments

"Text messaging is going to create more unsubscribes, so it's important that the messages are targeted and onpoint"

Metrics

"Being able to see what group or segment has clicked or responded with would be great"

Validating Early Concepts with Customers

Collaboration: PM

Key Findings from Lo-Fi Concept Testing

To maximize our research sessions, initial lo-fi concepts were shared with customers to validate my early hypotheses. Two key insights emerged:

- **Templates:** Customers strongly validated the need for templated flows. This would reduce their manual and cognitive load. It also provides them with a more efficient and visual starter to segment their journeys.

- **Trigger Filters vs. User Filters:** This concept received mixed reviews. Some customers could see value in this robust filtering while others thought it would be too overwhelming and complex. However, all agreed that of the two trigger filters were the priority. Customers could use branching if/else logic within the workflow to segment user demographics and not at the trigger level.
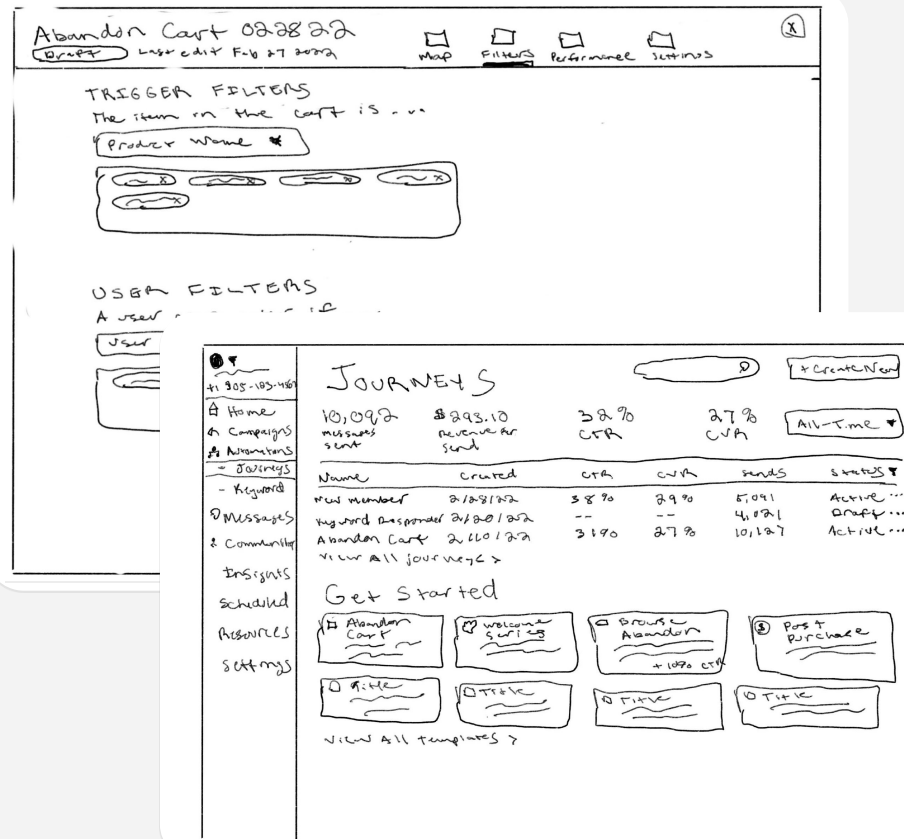
# Competitive Benchmarking: Designing for Versatility and Speed

To ensure our 0–1 builder would be competitive on day one, I analyzed how top-tier platforms handled multi-vertical workflows. We found that most competitors focused heavily on E-commerce, leaving a massive opening for a more **versatile, trigger-based system** that could serve diverse industries.

Key Competitive Insights:

- **Feature Parity:** We identified "must-have" triggers (abandoned cart, welcome series) to ensure we met the baseline market expectations.

- **The Differentiator:** While competitors provided the necessary segmentation logic, their execution was often hindered by high-friction micro-interactions. Specifically, a lack of flexibility and "user recourse" meant that making small errors in complex workflows often required starting over.

JOURNEY MAP - BRANCHING (IF/ELSE)

Branching logic is an action within the journey map.
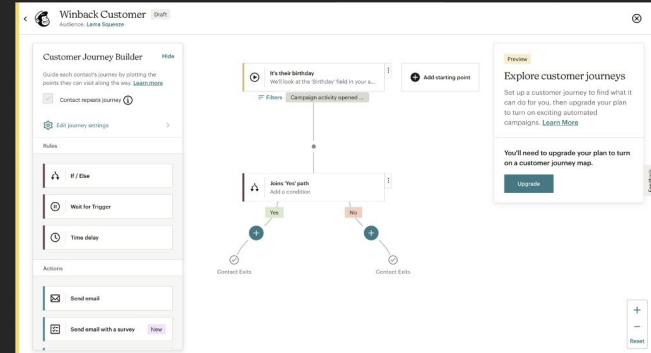
Pros
- UI is clear and color coded with the steps.
- Yes/No is intuitive as to what path users will go down
- Adding step nodes are clear that they are selectable under the branches with "+" icons
- Exit of flow is called out
- Filters for the Cards/Rules/Actions are available throughout the flow with the ellipses

Cons
- Can't remove the filter/condition within the card. You are forced to delete the whole branch or keep one of the branch paths

Design

Bringing Clarity to Complexity: The 0–1 SMS Workflow Builder

Translating user pain points and MVP requirements into high-fidelity compositions, I balanced **speed with scalability**. While I prioritized existing design system components, the 0–1 nature of this integration required several new patterns.

I collaborated closely with engineering to **build and document these additions in Storybook**, ensuring the design library evolved alongside the product.

The solution established a **strong visual hierarchy to clarify** how customers enter the ecosystem and navigate the end-to-end journey.
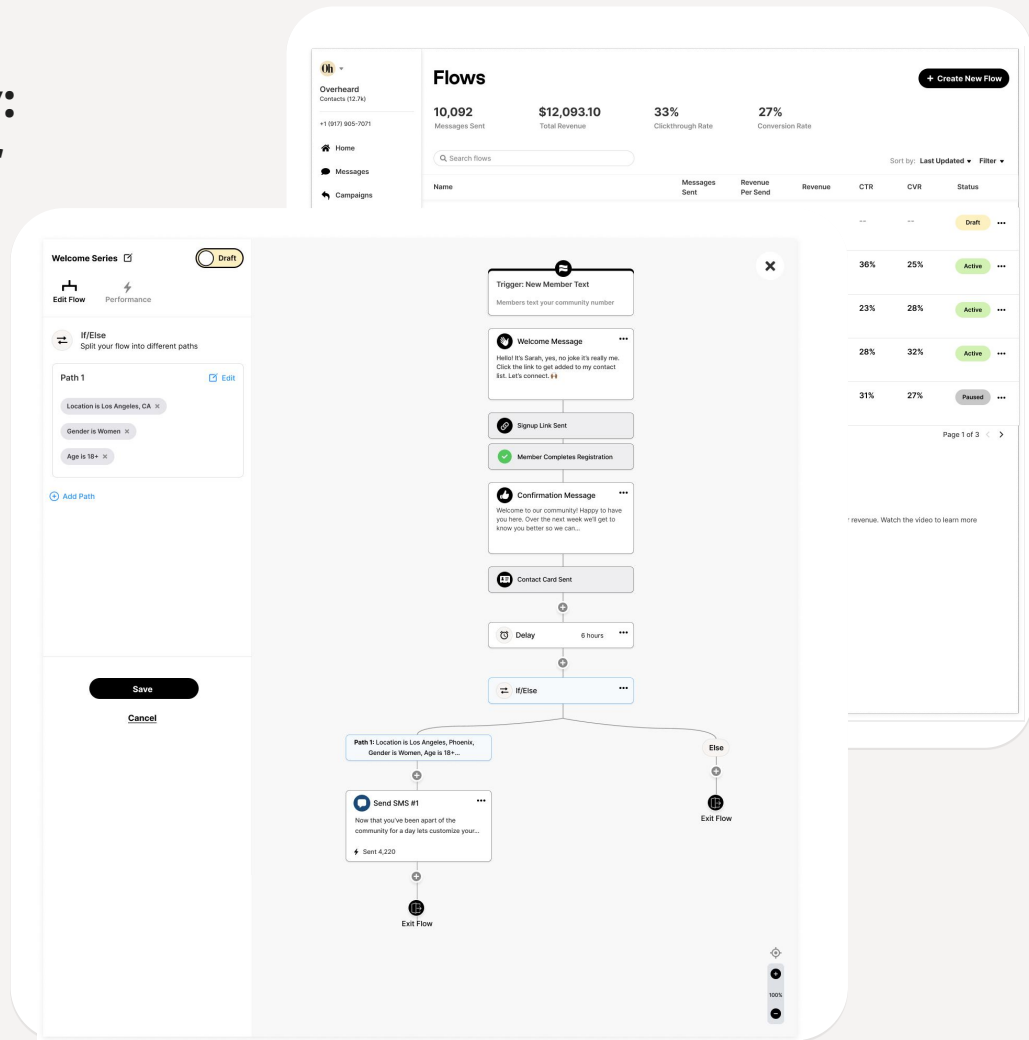
Results

Quantifying Impact: Public Beta Performance

The Public Beta validated our core hypothesis: precision drives performance. Even with a limited initial scope of triggers, users saw immediate, measurable value. Our data confirmed that hyper-personalized and targeted experiences are the primary catalysts for engagement. Within the first 60 days, Beta participants realized a **32% increase in average CTR** and an **18% improvement in CVR**, proving the efficacy of the new integration."

Learnings

KEY LEARNINGS

Relevant Targeting

While the initial scope was **limited to a "select few" triggers**, the high engagement proved that users value context over frequency. Moving forward, the strategy should prioritize **"High-Intent Triggers"** rather than broad-stroke automation. This shift from **quantity to quality** is what ultimately moved the needle on CVR.

Continuous Optimization

Metrics like CVR are highly sensitive to **losing steam.** What worked for early adopters in the first 30 days might need **adjustment as the user base grows**. Establishing a regular **Metric Audit** cadence between Product, Design, and Engineering is vital to **ensure our automated segments remain as effective** as they were on day one.