



LESSONS FROM WILLOWTREE EXPERTS

What You Need To Know Now That You've Bought **Braze.**

Foreword

*A Note from WillowTree Partner & VP
of Growth Marketing **Billie Loewen***



“There are three primary ways you can grow the value of your customer base: You can change your brand or your value proposition to better resonate with your consumers; you can iterate on messaging to be more meaningful through testing and segmentation; and you can upgrade your tech capabilities, reaching fans and increasing efficiency/effectiveness through automation and personalization. **Braze unlocks all three of these possibilities.**

As you embark on your journey to adopt Braze, it’s important to be intentional about how you plan to use this platform.

How do you want to shift your communication with customers and deploy more meaningful content? How will you test these messages? How will you understand and accurately measure what resonates with your customers and what doesn’t? How will you connect Braze with the rest of your ecosystem – call centers, social media, and beyond – to interweave consumer experiences?

If this seems like a big undertaking, it is. But it’s also fun and exciting.

We’re here to guide you every step of the way. From your creative vision to your channel strategy to your implementation plan, think of us as your bridge between IT, product, marketing, and creative teams; and, of course, between your fans, users, guests, and shoppers.

Our goal is to empower you to bring engineers, content creators, and marketers together and **create the conversations and experiences your customers have been waiting for.”**

Happy Brazing!



Introduction

Engaging with multiple targeted segments. Creating well-timed custom user journeys. Managing immense loads of customer data. It's a tough, messy job.

The time has come for you to pull the trigger on a customer engagement platform.

Maybe you need to **streamline and consolidate your data.**

Or perhaps you need **real-time data to feed automated, personalized campaigns.**

You're looking for **a robust tool with a short learning curve.**

You've chosen **Braze.**

With stats like an 840% return on investment in three years and over 2,200 hours saved with campaign creation, Braze is a solid choice.*

But how do you make sure your team has similar (or better) success?

That's where we come in.

Here at WillowTree, **we've helped dozens of Fortune 500 companies migrate and implement Braze.** This short, actionable guide represents our Braze experts' takeaways and best practices that will accelerate your time to value and put your business lightyears ahead of the competition.



In this guide, you'll learn:

PART 1

How to work with your
engineering team

01

PART 2

How to unwind from your
old systems and successfully
implement Braze

08

PART 3

How to migrate and launch
your new messages

14

PART 4

The most effective campaigns
and strategies

18

PART 5

How to use each channel
effectively

21

Part 1

How to work with your engineering team

A solid Braze foundation today...world domination tomorrow.

Creating a solid foundation for Braze means syncing with your engineering team from the start. Letting them in on your short- and long-term plans for Braze ensures your team can build and scale with minimal hiccups.



Understand their background

Understand your engineering team's familiarity with the current state of your data and the new platform you're moving into. Their experience level will determine how quickly they can get up to speed with the project and how long it'll take to migrate and implement Braze.

START BY ASKING YOUR ENGINEERING TEAM SOME OF THESE DATA-FOCUSED QUESTIONS:

- Who is responsible for our existing data?
- Where is the data being stored? If it is currently siloed in multiple locations, what's the process for consolidating it?
- What are the team's standards and best practices for ensuring data quality?
- What are the testing procedures for campaign triggers?
- What methods are we following to estimate timelines for tasks?
- What level of experience does your team have in Braze?

Posing these questions to your engineering team will ensure you have all the necessary people involved throughout this process. You want your team as close to the data as possible.

THE SHORTLIST OF DATA YOU'LL NEED TO GATHER AND SHARE:

- Use cases for each channel
 - Non-negotiable campaigns
 - Time-sensitive campaigns
 - Negotiable campaigns
- Campaigns, goals, attributes, and events you want to track
- Custom data requirements, such as custom events
- The number of app groups you need
- Campaign roadmap



Share your vision

To create a scalable Braze foundation, it's vital to share your goals and both short- and long-term use cases with your engineering team.

The more precise your instructions and directions are, the better the engineering team can be prepared.

Engineers have superpowers: they love to solve problems and turn those problems into incremental, chronological steps to get you where you want to go. As marketers, we may not know all the steps needed to get there.

By giving engineers a vision of what you want the user experience to be in the future, you are helping to get their problem-solving brains churning. They are then able to start putting the building blocks into place. **They can tell you what will be easy to accomplish, what will be a complex lift, and where the dependencies are.**

Where is there room to negotiate? What are time-specific non-negotiable campaigns?

Coming together with your engineering team can help you make strong, informed decisions about your implementation journey.

This conversation is about **balancing user needs with business viability** and the resources needed to make your vision come to life.

Sharing your vision and co-creating the Braze journey with your engineers ensures buy-in and gets them excited about your shared goals. And that is really powerful.

Implementation questions to ask your engineering team:

- What attributes, events, and event properties are required for the current and future use cases that we can start building out now?
- What is our current modularization strategy? How can we adapt our approach to fit our use cases?
- How will your team deal with identity resolution when one user is shown to have various user identifiers?
- How will our website be prepared for increased traffic?
- How will our team(s) address and limit channel silos (using different channel-specific solutions)?
- How will data be tracked through the software development kit?
- How will app groups be tested and configured?

“Building technical features early means thinking through the data and events that are necessary to maintain current marketing efforts. It also entails logging the attributes, events, and event properties that are necessary to enable a marketing vision for tomorrow. Including those aspirational, “blue sky” marketing initiatives and logging those parameters early will allow for a robust and flexible engagement platform that can easily grow and evolve. The sooner you get those technical features in place, the more you can avoid the development bottlenecks that slow or hinder progress.”

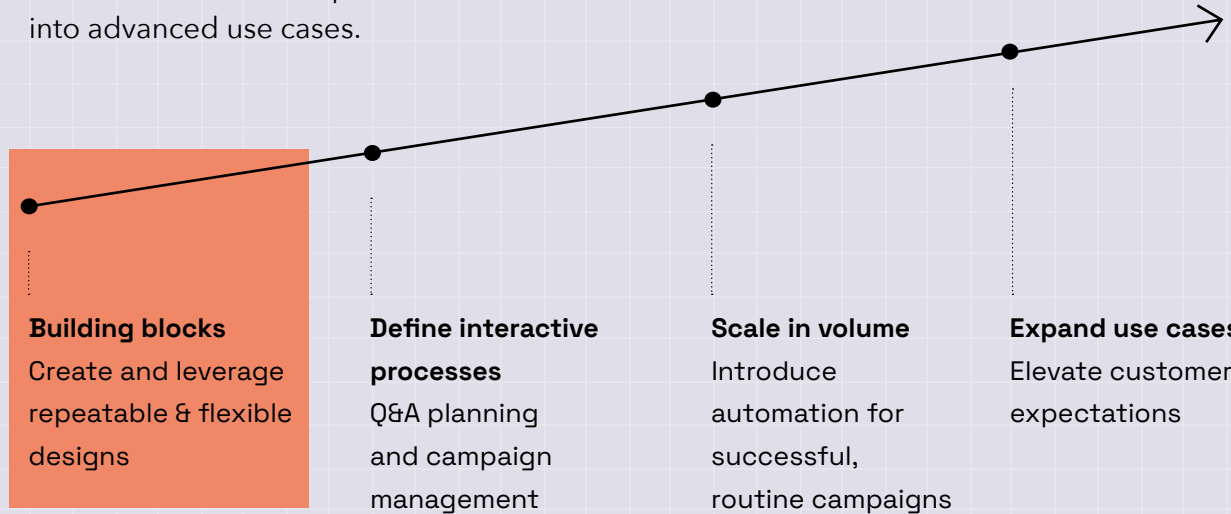


A Note from WillowTree's
Growth Engineer **Ben Whitlow**



AUTOMATE THEN INNOVATE

Strong foundations enable the scale needed to expand into advanced use cases.



Hot Tips

When thinking about use cases, start with a minimum viable solution, knowing it will become richer the longer you use Braze.

You may have grand visions for email sequences and SMS broadcasts, but ensure you have the basics, such as an onboarding series, in place first.



Create a data dictionary

Engineering teams often use highly technical terms and jargon misunderstood by other departments. It's vital to develop a data dictionary to ensure engineering and marketing teams are aligned and speaking the same language.

A **"data dictionary"** is typically an excel spreadsheet that includes a list of terms and metrics to help bridge the "jargon barrier" between departments. The steps to create a data dictionary are straightforward but may take some time (and flexibility) depending on the size and availability of your teams.

Here is what building a data dictionary might look like for your team:



STEP 1 COLLECT RELEVANT TERMS

You've already shared your use cases with your engineering team. Now it's time to collect the terms, acronyms and metrics your team and the engineering team might use when approaching these use cases.

STEP 2 DEFINE THE ATTRIBUTES

Have each team define the attributes or meaning behind these terms and metrics, and discuss any differences of opinion or other conflicts that might arise.

STEP 3 FIND ALIGNMENT & SIGNOFF

When debate inevitably arises, one team may accept another's definition of a term, or both teams might compromise on a new term. Either way, teams should review and sign off on a final list.



To help you think strategically about your data dictionary, here are a few scenarios and cautionary tales we'd like to share:

SITUATION #1

Your marketing team has spent weeks crafting an email sequence built upon a specific event trigger named eventAwesome. The engineer does not know this event or understand what it means. The engineer updates the event, and your entire email flow is broken. You don't realize it until weeks later when the customer service tickets have piled up.

Engineers have a specific data taxonomy for every user action a visitor can take on a website. If engineering teams and marketing teams don't agree on what these specific event triggers are called, mishaps like broken email flows can happen.

SITUATION #2

Too often, we lack shared definitions between departments, and sometimes within teams as well. Something as simple as defining a conversion can lead to lively debates.

For example, if you work in retail banking, a key metric may lie in customers opening new accounts. The customer goes online. They submit an application. That application routes to the backend system for review. It is accepted or rejected. A message is then sent to that user notifying them of the decision.



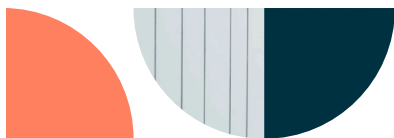
At what point has that customer “converted”?

You'd be surprised how many organizations, departments, and teams differ in their definitions.

This is what a data dictionary solves.

A data dictionary is not only vital between departments but also within individual teams.

It's a shared lexicon that will save you many future headaches.



Part 2

How to migrate away from your old systems and successfully implement Braze

Now that you have a solid plan in place, it's time to begin moving out of your old systems and implementing Braze.

First, Audit Your Current Content.

Second, Create an Informed Timeline.

Third, Draft an Implementation Plan.

Ready? I heard a yes. Here we go!



Audit your current content

This is where many brands make mistakes. They immediately move all of their data and campaigns from their old platform into Braze without taking a second look.

Many companies view a massive list as a success, no matter how disengaged. That's just not true.

You may have a list of 10 million “customers” but only 100,000 are engaged. If you focus on creating content for all 10 million, **you are trading impact for effort.**

Let's say you work at an airline, and you believe your overall 10 million user list loves having a meal choice of either beef or chicken when they are flying on your airline. Meanwhile, the majority of those 100,000 engaged users prefer vegan options.

By migrating the data of the entire 10 million without a proper audit first, you are missing out on a critical piece of data. You'll start blindly funneling money and time into campaigns for premium carnivore meals when you should be focusing on marketing to vegan users.

What do your most engaged customers want? What content is most relevant to them? A lack of awareness can lead to missed opportunities and less-than-stellar campaign results.

Don't worry, we won't let this be you.

You can avoid this expensive issue by auditing, or simply cleaning up, your current content.

Clean, optimized data will help Braze create richer user experiences and happier, paying customers.

To develop these meaningful user experiences in Braze, you want to review your current assets, revamp your channel strategy, and archive what's no longer relevant.

 *Does all of this information need to be moved over, or can some be packaged and stored for later use?*



“When thinking about what content you want to put in Braze, don’t throw everything at it. Think about what adds real value to your customer so you can feed Braze the right data, and it can help you create a thoughtful user experience.”



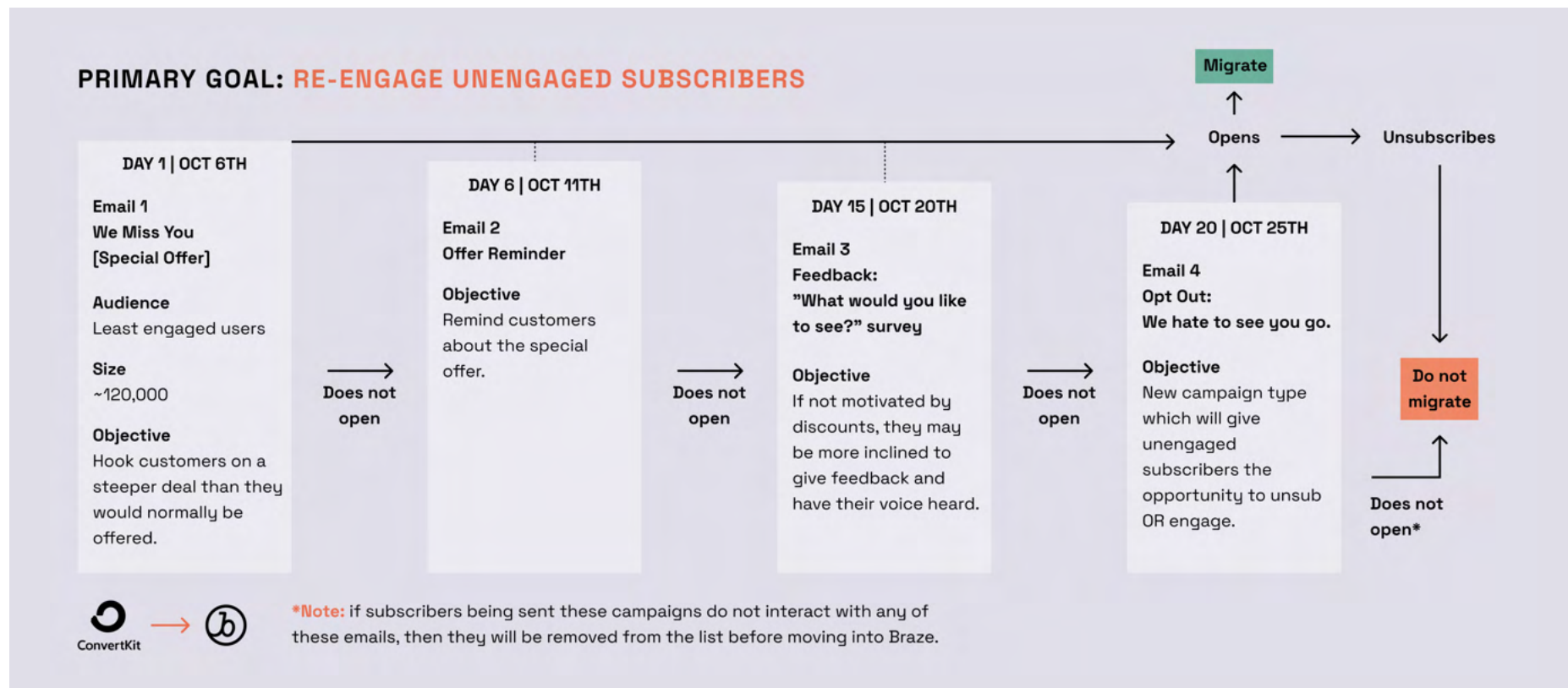
A note from WillowTree's
Associate Growth Director **Ross Koon**



In auditing your data, we recommend:

- Streamlining your user journeys
- Redevelop your creative and module strategy
- Deduping your data
- Reviewing nuances in your user base and properly segmenting for significant nuances
- Removing email addresses that have bounced
- Managing non-responders
- Removing role accounts

Example of how to remove disengaged users:



Don't be afraid to wipe from your list customers who haven't been listening. So many companies refuse to let the disengaged customers go—they're too focused on growing the overall number of subscribers—and as a result they create campaigns based off of bad data.

Let them go.

Then put 80% of your marketing effort into the people giving you 80% of your revenue.

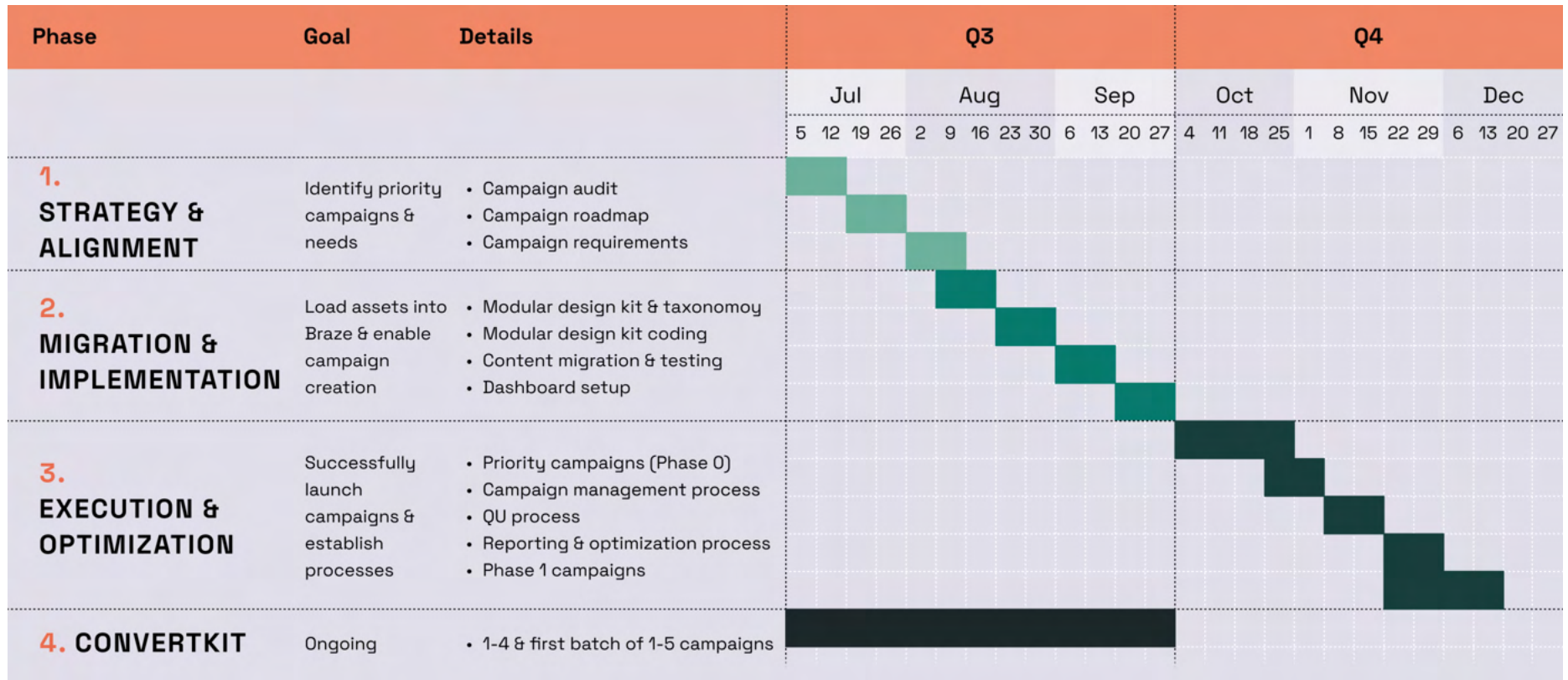
Create an informed timeline

Be realistic with your timelines and be prepared to have them extended.

When creating a timeline, consider the experience level of your engineering team, the development and execution timeline of

your creative team, and the stages of review and approvals that need to occur.

Here's an example of an implementation timeline, migrating from MailChimp to Braze:



Draft an implementation plan

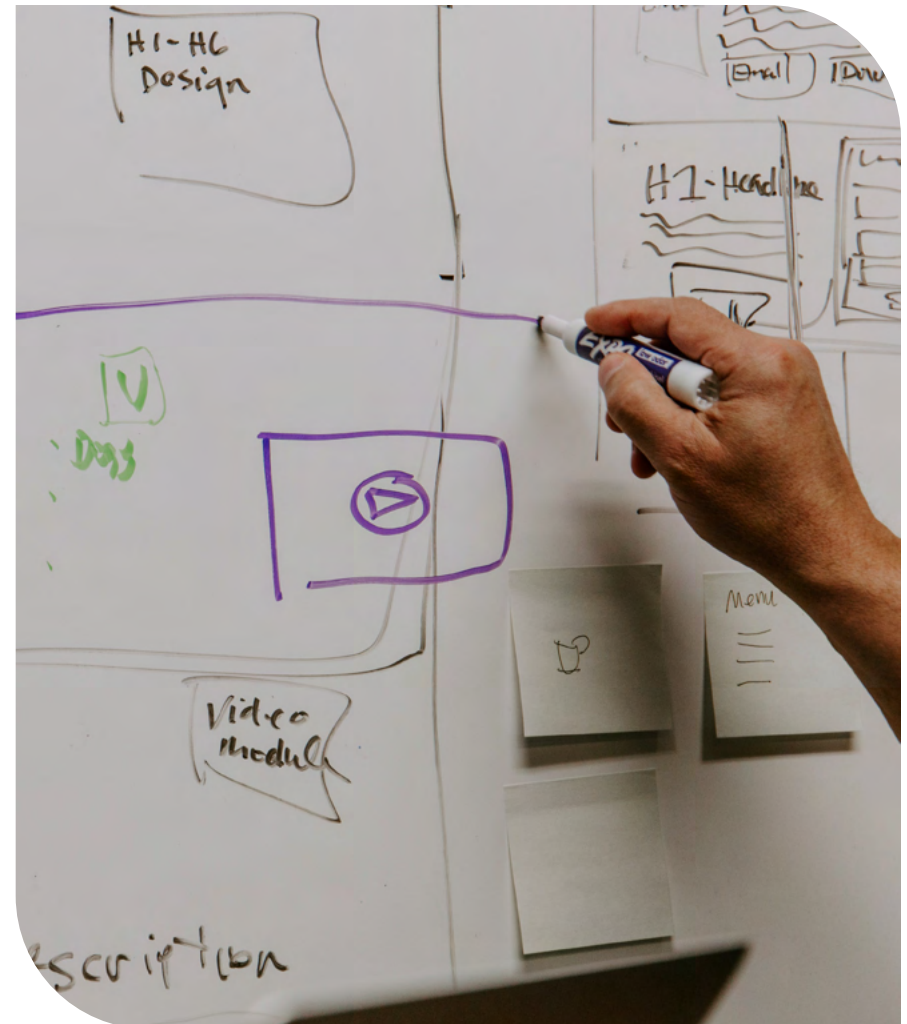
Keep in mind that your team will likely be operating in two systems at once as you migrate into Braze. Nobody wants whiplash. **Put a plan in place to minimize the time your team spends bouncing in and out of the two systems.**

The key is to decide on a firm cutoff date where the old platform will no longer be used. An ideal cutoff date is the date when the last email will be sent from your old system. Though keep in mind that a member of your team will have to keep track of any analytics or changes in user preferences for at least ten days after this last email is sent, and update Braze accordingly.

When the final email is sent, you'll need time to warm up the Braze IP addresses (aka, **IP warming**, see Part Three below). We recommend giving Braze at least two weeks to warm up. If your list is larger than 1 million subscribers, you'll likely need 3-4 weeks. During this time, limited emails will be sent.

Why?

We only want to send emails out of one system at a time to ensure the user gets a consistent experience. However, you will not be able to send an email to your entire list right away in Braze due to IP warming. Hence, limited sends.



By creating a clean break between systems, you limit the number of times your team has to jump between the systems and ensure a consistent experience for your customer.

Part 3

How to migrate successfully and launch new messages

Okay, you are ready to launch your new messages and watch those new conversions roll in!

Don't you worry, they're coming.

As you migrate to Braze and think about launching your first messages, it's essential to start strategically and slowly—looping in all necessary stakeholders—to ensure no stone is left unturned and everyone is prepared for...IP Warming.

Get everyone in the room

Internal alignment and clear, open communication are key to a cross-functional project.

Your creative team may have wireframes and content ready to fly out the door in a couple of weeks, but your engineering team needs at least three weeks to input, test, and execute them.

Understand that there are different representatives and managers for each system you use with different timelines and functional needs.

What work can be done in tandem? What are the dependencies between teams?

Have conversations early and often regarding functional requirements, timelines, and approvals that need to be made so you can adjust your timeline and expectations accordingly.

CONVERSATIONS SHOULD INCLUDE (BUT ARE NOT LIMITED TO):

- Onboarding meetings detailing campaign priorities, functional necessities, and timelines
- Detailed documentation on each team's processes and expectations
- Braze documentation detailing capabilities and use cases
- A communication plan



Prepare for IP warming

“IP warming” is the process of slowing sending emails to small volumes of your list and then slowly increasing the send volume to gain the trust of the mailbox providers and increase your chances of getting into your customers’ inboxes.

Emails must initially be sent in small batches to engaged users. Your IP will begin to “warm” (in other words, build trust) with the email provider as users receive and open more emails.

If IP warming is not done and you send an email to your entire list, the email provider may see it as spam. This leads to bad email addresses, lack of opens, spam marking, large volume spikes, and domain blacklisting. While blacklisting on public trust indexes can be resolved, often times a blacklist from an individual domain is irreparable on a dedicated IP.

Sending small batches of emails to your most engaged users increases the chances of your first emails being opened and clicked. When the majority of your first email sends are opened, the email provider sees that these emails are desired and enjoyed.

Trust is built. You are then labeled as a safe sender, which boosts your reputation.

HERE'S AN EXAMPLE OF AN EFFECTIVE IP WARMING SCHEDULE:

IP WARMING SCHEDULE EXAMPLE		Day	Date	Send Day	# of Sends	Total # Sent
Days 1-8 5- star subscribers	Monday	1-Nov	1	200	200	
	Tuesday	2-Nov	2	500	700	
	Wednesday	3-Nov	3	1,000	1,700	
Days 9-10 3 & 4- star subscribers	Thursday	4-Nov	4	2,000	3,700	
	Friday	5-Nov	5	5,000	8,700	
Days 11-13 Gradually introducing lower- engagement subscribers	Saturday	6-Nov	6	10,000	18,700	
	Sunday	7-Nov	7	20,000	38,700	
	Monday	8-Nov	8	40,000	78,700	
	Tuesday	9-Nov	9	50,000	128,700	
	Wednesday	10-Nov	10	75,000	203,700	
	Thursday	11-Nov	11	100,000	303,700	
	Friday	12-Nov	12	150,000	453,700	

IP WARMING BEST PRACTICES:

- Maintain a clean email list with high engagement to improve sender reputation.
- Start by sending a small volume of emails to your most engaged users first and increasing the amount sent each day.
- Use engaging content to maximize email interactions.
- Continue sending emails at a consistent cadence to help maintain a high sender reputation.
- **If your list size is greater than 500,000, make sure you have an email deliverability expert as part of your team.**



Hot Tips

Knowing the customer file size and average sending volumes will factor into the plan and let you know how long IP warming will take.

The most effective campaigns and strategies

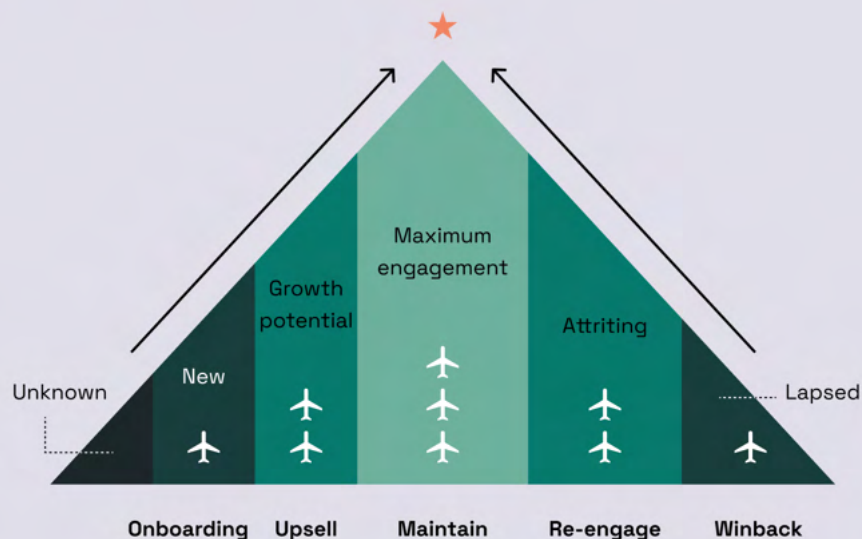
You are looking to create richer, more meaningful experiences for your customers. You want to send them the right content at the right time without sending too much or too little.

So, where do you start? Right here.

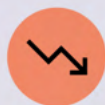
What are your brand initiatives that all users should see, and where are your most significant gaps?

What content needs to be tailored and personalized? Are you missing a welcome sequence? Do you have a large group of disengaged users? What's the health of your audience? Who needs your attention?

BEHAVIORAL LIFECYCLE



What is the size of each cohort? What's the value of a single user in each cohort?



What cohorts are underperforming?



What cohorts present the greatest opportunity for growth in value?

Aside from your general mass sends, we recommend creating and/or optimizing the following campaigns and sequences:

- **Onboarding sequence:** the initial sequence of emails a user receives when opting in. This is your way of educating the user on what you offer, what sets you apart from competitors, and the different actions they can take.
- **Activation campaign:** an activation campaign generally comes towards the end of an onboarding process. This campaign aims to get the user to take action and convert. We recommend focusing on your activation campaign over a win-back campaign if you already have purchase data coming in.
- **Win-back campaign:** if users are beginning to feel disengaged or haven't purchased for a while, this campaign is used to reignite their interest and incentivize them to buy again.
- **Loyalty campaign:** a campaign used to encourage users to continue to shop with you because of the exclusive benefits you offer them as repeat customers.

Recommended Strategies:

- Save A/B testing for later
- Launch these campaigns in phases, starting with the minimal viable product
- Launch your weekly sends to your larger audience
- Map out the priority importance for each campaign
- Be consistent
- Save liquid logic for later, when you know what resonates with your different segments



Hot Tips

Onboarding flows are the most critical part of your lifecycle messaging. Ensure you have a well-thought-out welcome sequence, as it helps to set a solid foundation for user preferences to help delight and retain customers down the road.

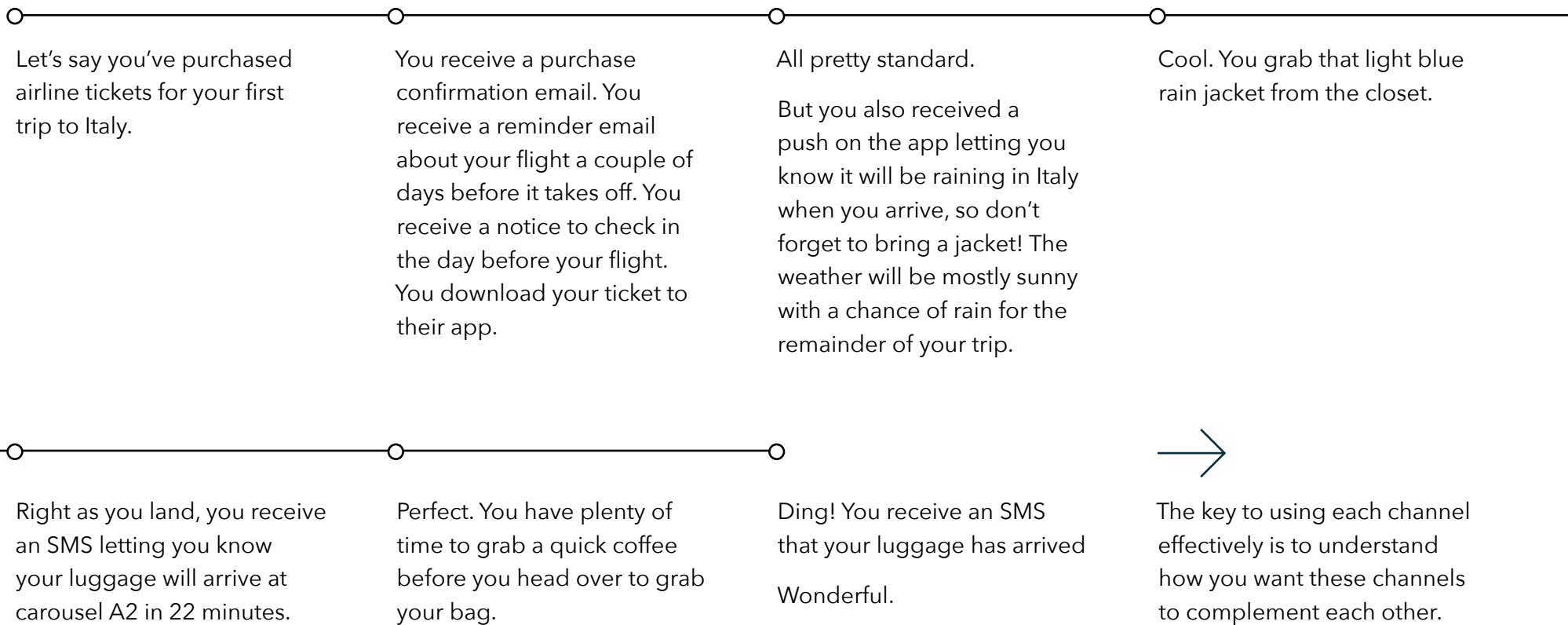
Receipts are the most opened messages that are rarely optimized. This is a wonderful opportunity to incentivize the user to a further purchase or add additional value.

Take advantage of connected content for email to help boost conversions. Connected content is also easier to set up and send.



Part 5

How to use each channel effectively

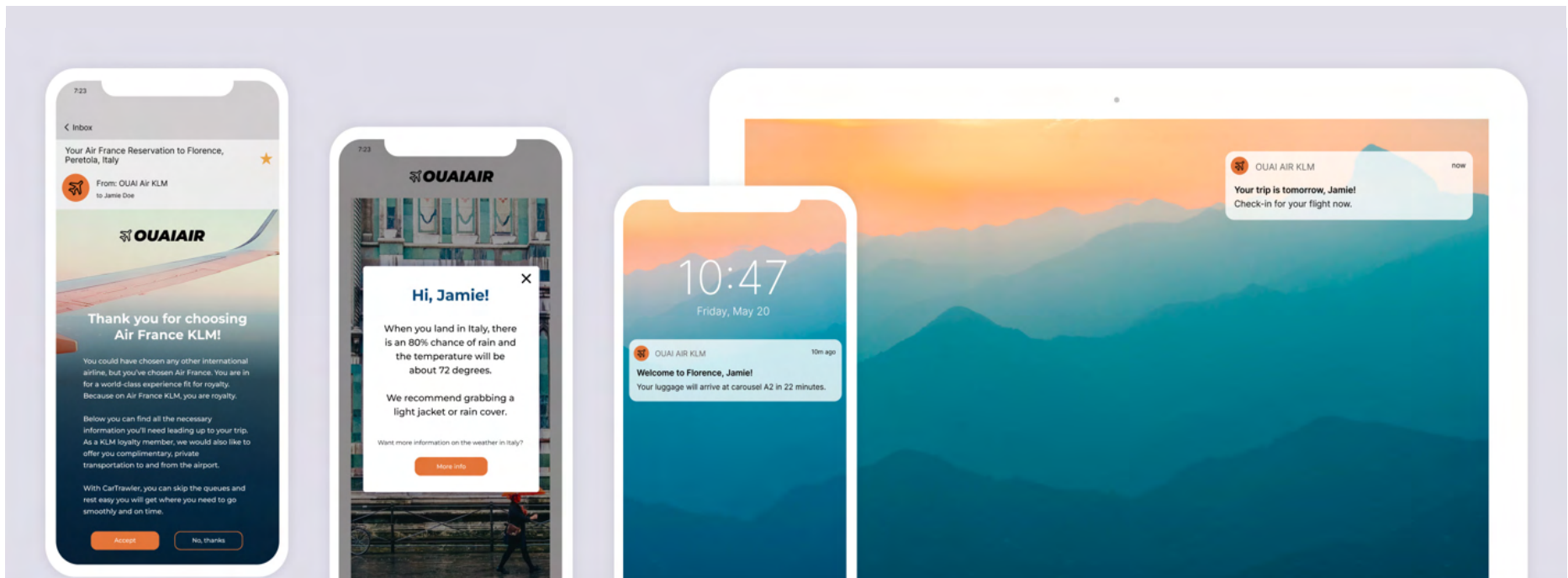


Do you currently have a multichannel or omnichannel approach?



A **multichannel approach** is when you use multiple channels to communicate with your customer but no place where data is consolidated to understand the complete picture of the customer journey across those channels.

An **omnichannel approach** is one where every channel you use to communicate with your customer is connected, creating a more personalized, data-driven, and complete experience for your customer.



“Going from a multichannel to an omnichannel approach will have a massive impact on your engagement and conversion rate. At scale, even small improvements in conversion rate can yield huge ROI. The key to an omnichannel approach is to be thoughtful. Creating content that differs and doesn’t mimic other content is key to sustained growth.”



A note from WillowTree's
Director of Revenue Operations **Anthony McQueen**



We've put together this insane chart below to help you craft your omnichannel strategy.

Feel free to cut this out and tack it to your wall to reference again and again.



	Best For	Do Not Use For	Strategy	Combine With	Level of Urgency	Level of Tolerance
Email	Robust, longer content; win back customers; nurture sequences; abandoned cart; onboarding.	Highly technical information.	Use to nurture the customer journey; balance engaging and lifecycle emails with sales emails.	<ul style="list-style-type: none"> Email + Web Push Email + In-App Email + Push + In-App + Web Push 	Low	High
Content Card	Sticky content; surveying audience preferences; examples: experience a new feature, targeted promotions; onboarding.		Gamify their experience; dynamic content; semi-persistent; targeted experience.	<ul style="list-style-type: none"> In-App + Content Cards 	Low	High
In-App	Onboarding.	Win-back customers, promotions, gifts.	Targeting, personalization; pairs well with email and push; prime users for important features; ask for reviews; capture emails.	<ul style="list-style-type: none"> In-App + Content Cards In-App + Email + Content Cards Push + Email + In-App + Web Push 	Mild	Mild
SMS	Necessary information such as receipts, confirmations; real-time order updates; exclusive information; back-in-stock notifications; birthday promotions; flash sales; subscription renewal; event attendance; app exclusive.	Non-exclusive promotions, entertaining content.	Keep it short, concise, and personalized; use to add value to engaged customers; compliment your onboarding sequence.	<ul style="list-style-type: none"> SMS + Email SMS + In-App 	High	Low
Push	Win customers back; urgent information; ex: boarding information for a flight.	Spam, news channel.	Add delight, reduce sales noise; precise, personalized content; use behavior-based segmentation.	<ul style="list-style-type: none"> Push + In-App Push + Email + In-App + Web Push 	High	Low



To sum up

Well, dang.

If your head is spinning right now, you are not alone.

But rest assured that by reading this ebook you are doing more than most.

Now, by implementing just a few or all of our recommendations, you will be running consecutive Usain Bolt, olympian-level laps around your competition (and saving your team's sanity in the process).

Let's break down how you're going to capitalize on Braze:

- ❑ **Get with your engineering team** to understand their background, share your vision, and create a shared data dictionary.
- ❑ **Begin your move out of your old systems** and into Braze by auditing your current content, creating an informed timeline, and drafting an implementation plan.
- ❑ **Migrate and launch your new messages** successfully by ensuring everyone who needs to be involved is on the same page with your implementation plan and prepared for IP warming.
- ❑ Prioritize your most needed and effective campaigns to **delight and retain your valued users.**
- ❑ Combine your campaigns with an **omnichannel approach** for a drastic jump in revenue and **long-term scalable growth.**

Perfect.

Before you close this ebook and frame it on your wall, I have one more piece of parting advice.

Don't be shy about reaching out.

Whether you need help with implementation or strategy, our expert team of scrappy geniuses is at your service. We live and breathe Braze. No matter where you are in your Braze journey, we can easily plug in just where you need us.

Right now you've booked your tickets first-class to the Italian vacation of your dreams.

Why not top off the trip with a stellar team of WillowTree guides to get you exactly where you want faster and smoother so you can rest a little easier?

Are you curious but not sure?


Interested, but not ready yet?

No worries at all.

You can contact us below and book a call with our development expert. They are super nice. And very funny, according to recent team happy hours.

We are so excited for you!

Happy Brazing!



Need help with Braze?



Our expert team of expert craftspeople is at your service. We plug in when and how you need us to help you develop, grow, and scale your business.

Let's Talk About Braze

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