



CASE STUDY 1

Redefining Campaign Messaging & AI Conversations for SMB Communicators

MY ROLE

Lead Designer

OUR CUSTOMER PROBLEM

How do I do **increase engagement** and response rates while reducing campaign overheads.

THIS IS WHAT WE CURRENTLY KNOW...

Response Rate - Too Low

1-2%

Is quite low and this increases campaign overheads

Send Campaign - Too Long

20 min

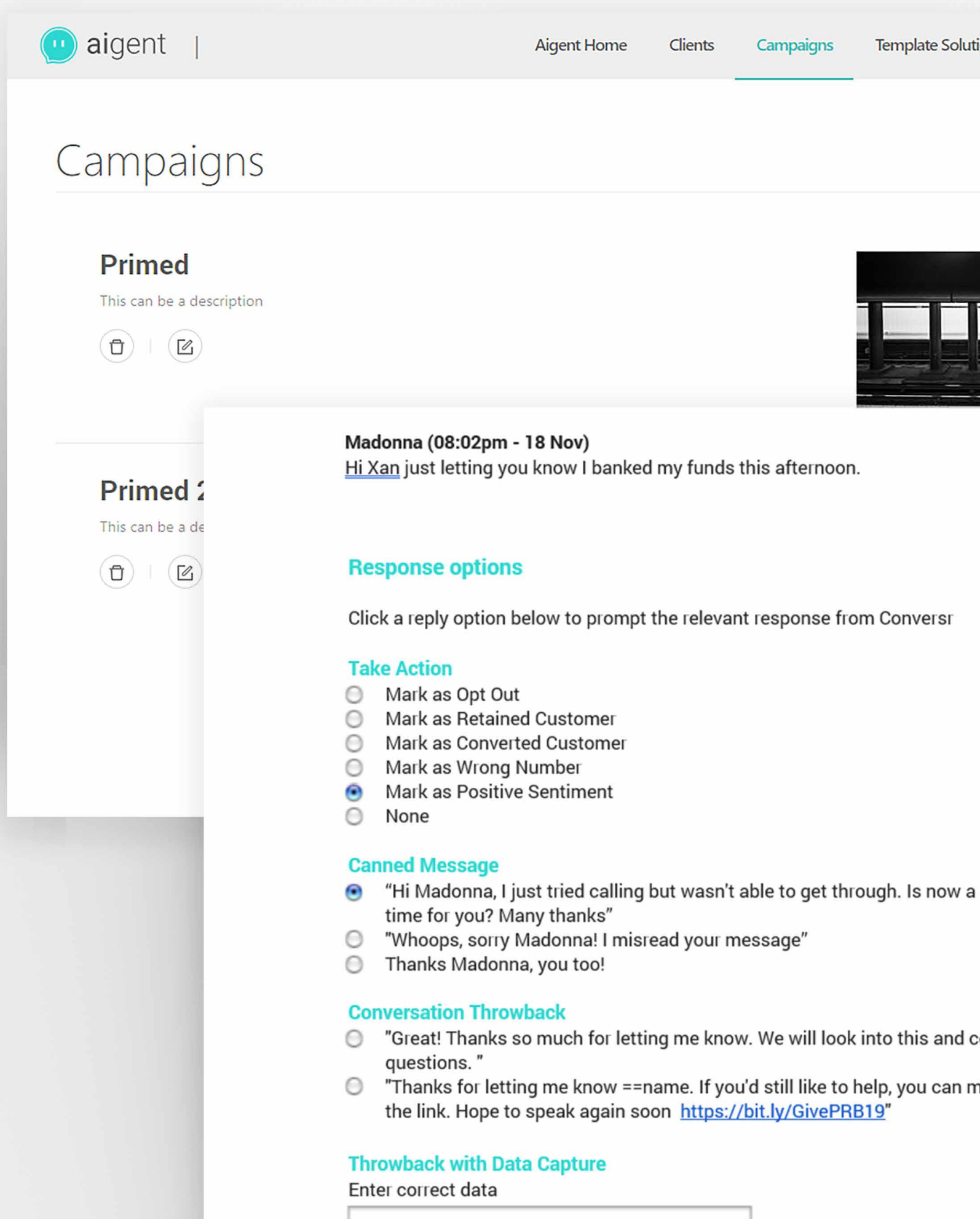
There is friction in the sending campaign flow

No. of Campaign Staff - Too Many

5 - 10

To manage customer responses involves a number of staff

Note: We send 24 mil messages per month



OUR GOALS

Increasing **value** to our customers through automation will increase engagement and reduce campaign costs.

PROVIDING VALUE MEANS IMPROVING ON WHAT WE DO CURRENTLY BY:

Increasing The Response Rate

3% ↑

Using crafted automated conversations will improve response rate and engagement.

Reducing Send Campaign Time

10 min ↓

Current times are as follows:
Simple Message Time 20 min
Conversation is 15 min

Migrating Protobot Users

80% users ↑

Migrate users from ALPHA prototype to BETA App.

Reducing No. Of Campaign Staff

3-4 ↓

Reduce the number of transition operators for a campaign. A bonus is reduce campaign costs by 20%.

RESEARCH: WHAT WE DISCOVERED THROUGH CUSTOMER WORKSHOPS

What do we know about the **current roadblocks** to having better engagement and ROI ?

“Could you allow message receiver to select yes or no as a reply”

Inability to converse with an audience.

Once a campaign is sent that's it. Customers want to easily respond to contacts and know what's happening in their campaign journey. 42% are using simple automated functions which are complicated to set up.

“How do you pause a campaign if you noticed a problem with your contacts? ”

Customers could not easily pivot campaigns once sent.

Once a campaign has been sent you cannot stop or pause the sending. Customers have experienced financial loss because of an error in their message or contacts list.

“I don't want to come into the office on a Saturday to start a campaign.”

Manually managing campaigns and contacts.

Setting up a campaign takes on average about 20 minutes. This was from uploading contacts (a manual upload to activate campaigns) to an awkward experience for creating a campaign.

RESEARCH: UNDERSTANDING NEEDS, WANTS AND PROBLEMS

Current experience



Campaign set up instructions
<https://burstsystems.atlassian.net/wiki/BuyChrom6>

Opportunities

- Syncing via API for Contacts
- Syncing Via Google spreadsheets
- API to Connect 3 apps through 1 UI
- Create Solutions for subscription
- Opportunity is to remove the need for consulting to configure and set up

Problems

- Navigating between 3 apps to create a workflow
- Needs a developer to set up a conversation
- Configuration is complex and requires 1-2 devs
- Reporting is complex and difficult and requires a lot of downloading of CSV files by the consultant - this should be done by client.

Questions for Tranistions



Our solution

To create a simple automated campaign creation tool for no coders.

Enable clients without automation/bot programming knowledge to easily deploy complex activities to achieve high value objectives while still having the ability to configure for their specific requirements.

Pros

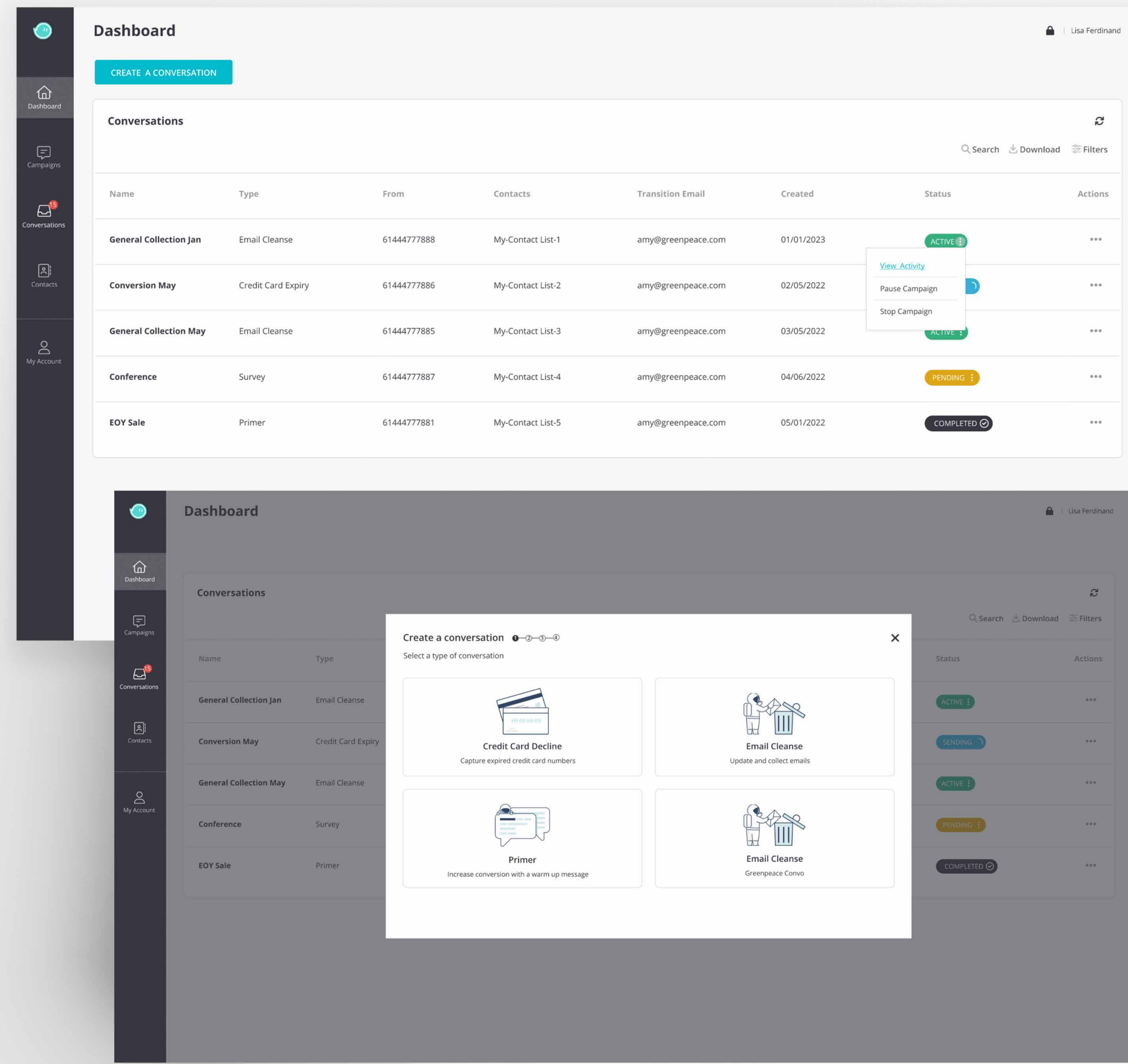
Allowing non technical customers to automate their customer engagement journey.

Cons

Templating conversations can remove some flexibility in personalisation of messages.

Customers - Communicators

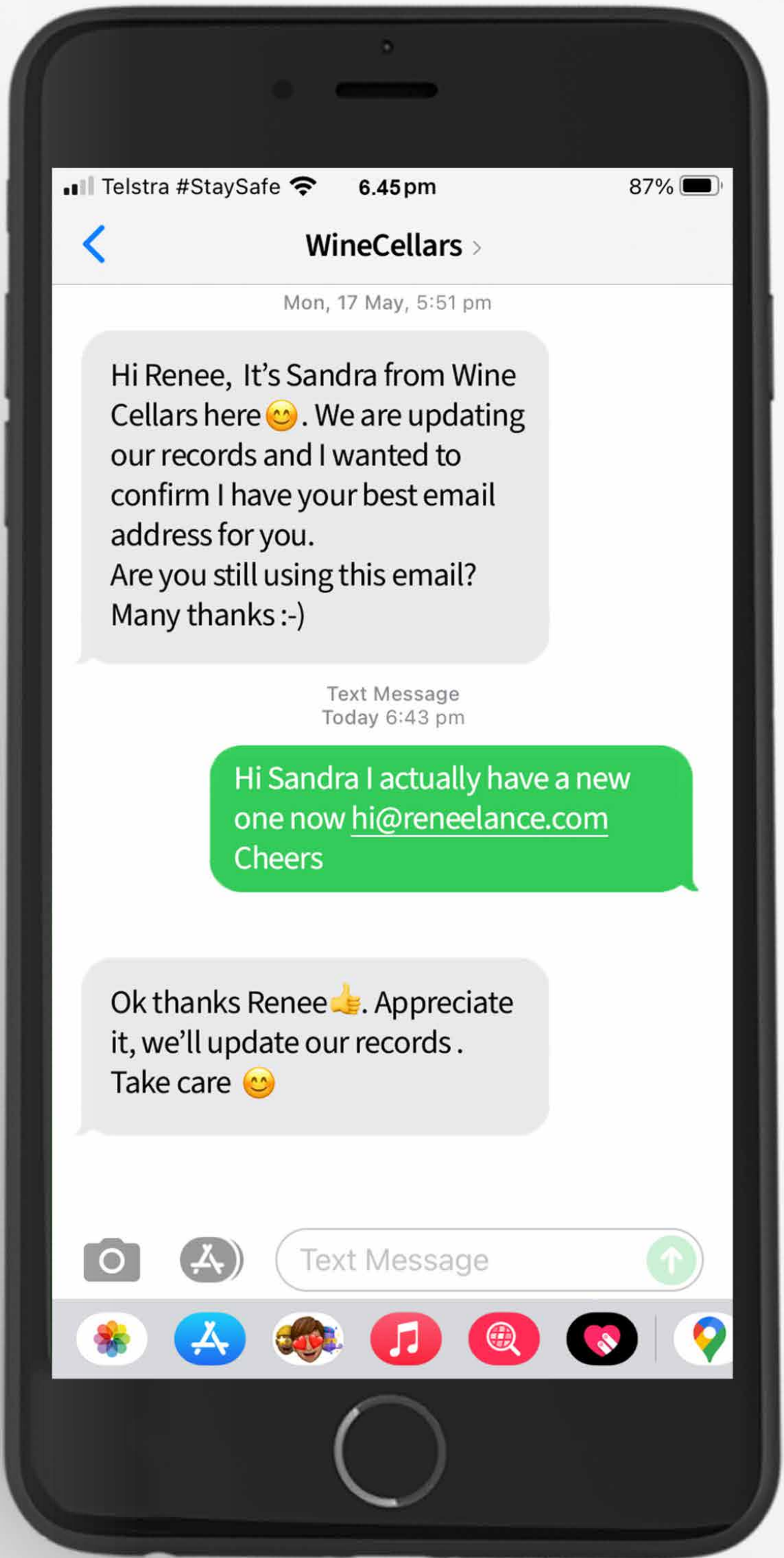
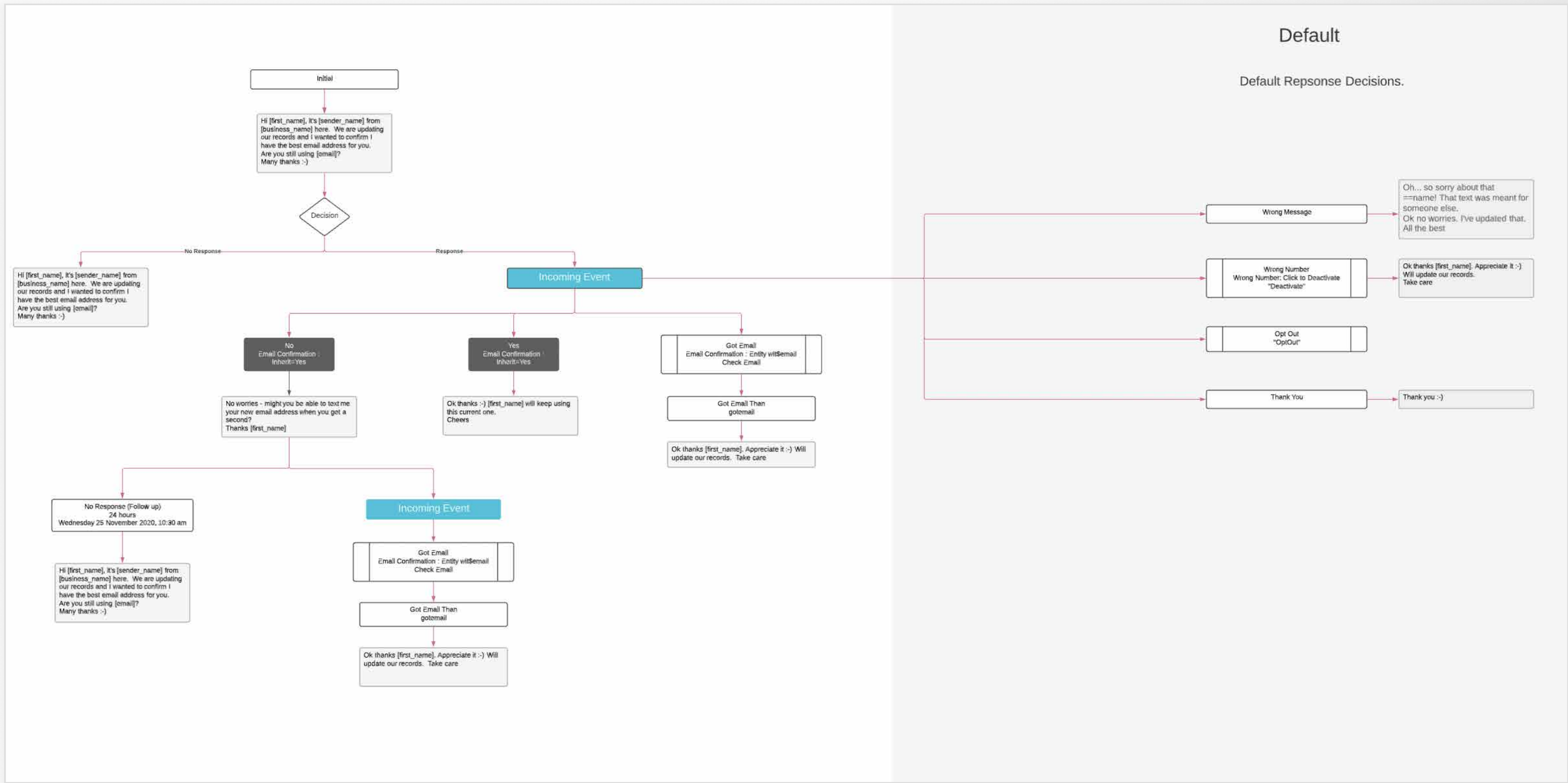
- User Persona 1 - Conversation Managers
- User Persona 2 - Conversation Designers
- User Persona 3 - Transition Operators



SOLUTION PHASE: PROVIDING CONFIGURABLE NO CODE SOLUTION

AI Conversations Templates

Users can send a conversation through a configurable interface. Repurposing conversations required looking at the effectiveness of past conversations, success rates and language tone for Email Cleanse, Credit Card Declines, Primers and Surveys. JSON Templates were created.



SOLUTION PHASE: OUR OVERALL PHILOSOPHY UNDERPINNING OUR PROCESS

Our principles

Providing better value for our customers.

We need to ensure that we are making our customers jobs easier. We have the expertise across all our customers as to where success lies with campaigns what works and what doesn't.

We need to give them flexibility with campaign management and allow them to easily pivot to maximise campaign results and to reduce cost.

Empowering our customers to engage more with theirs.

Its important that we enable our customers to engage with theirs. To know and understand how they build engagement and to help them scale and ensure flexibility with that scaling.

It's our job to ensure that they have the visibility they need to increase that engagement with their customers

Ensure that customers can self serve with options.

All our customers should be able to have conversations and send messages no matter what their level of technical expertise.

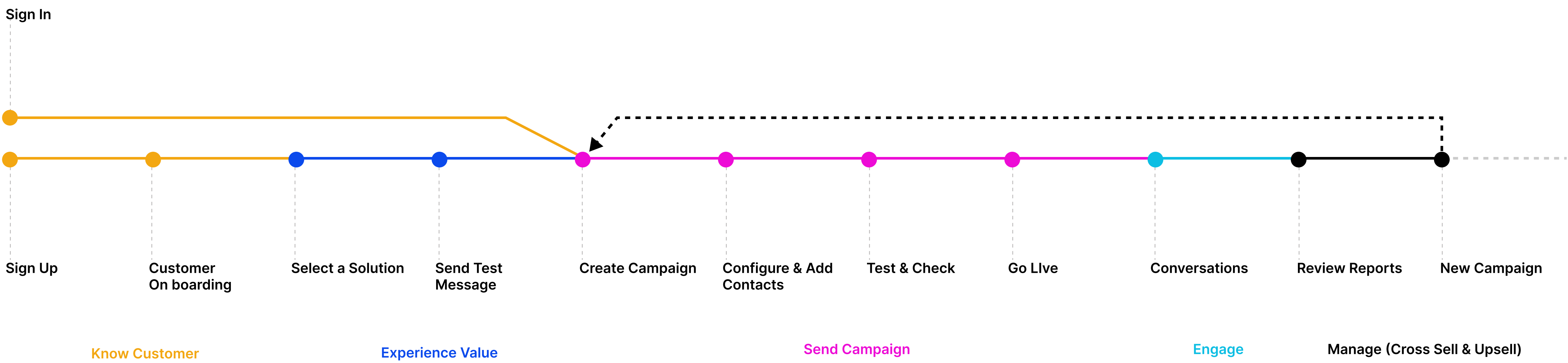
Its is critical that we place emphasis on automation to reduce reduce campaign cost and time spent on campaign creation.

SOLUTION PHASE: THE USER JOURNEY GOAL WAS TO SIMPLIFY THE FLOW

Campaigns journey

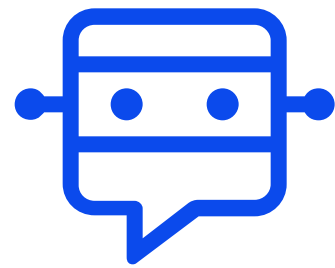
A major aspect to this customer experience was to provide pre-defined solution options. We conducted a workshop with product to create a frictionless experience. We wanted to also incorporate the flexibility to by-pass onboarding automation and allow users to define their own or come back later to set up.

One of the challenges for customers is their low tech experience which makes creating their own automation out of reach. This journey provides template conversations and incorporates educating the customer of other templates for their solution to improve campaign results.



SOLUTION PHASE: WORKING WITH PRODUCT AND ENGINEERING TO DEFINE OUR OUTCOMES

Key priorities for our BETA



Providing automation & template conversations

Templating messages and conversations with some predefined configurations that can be reported on under a single campaign container for no code and low tech users.



Creating and managing a campaign

Providing a simple flow for users to select templates, configure and add contacts. Providing pause, stop and scheduling allows flexibility in the management of campaigns.



Live agent portal for conversations

Refine intent responses to reduced number of manual responses. Improve contact management through search and filter capabilities for contacts. Display clearer conversation threads.



Report page for key campaign insights

Provide more relevant curated insights for conversations and campaigns to be able to pivot a campaign. Automate from these insights and recommend additional solutions based on insights.

SOLUTION PHASE: TESTING OUR DESIGNS & IDEAS

Experiments

Campaigns / Primed

Create Campaign Solution

Christmas Message

Touch Point One

Type: outbound
Sensitive: Yes
Out Of Hours Delay: No
Scheduled: No
End: No

Christmas Message (Second Batch)

Touch Point One

Type: outbound
Sensitive: Yes
Out Of Hours Delay: No
Scheduled: No
End: No

Christmas Message (Third Batch)

Touch Point One

Type: outbound
Sensitive: Yes
Out Of Hours Delay: No
Scheduled: No
End: No

Christmas Message (Fourth Batch)

Touch Point One

Type: outbound
Sensitive: Yes
Out Of Hours Delay: Yes
Scheduled: No
End: No

Christmas Message (Sixth Batch)

Touch Point One

Type: outbound
Sensitive: Yes
Out Of Hours Delay: Yes
Scheduled: No
End: No

Christmas Message (Fifth Batch)

Touch Point One

Type: outbound
Sensitive: Yes
Out Of Hours Delay: Yes
Scheduled: No
End: No

Christmas Message (Seventh Batch)

Touch Point One

Type: outbound
Sensitive: Yes
Out Of Hours Delay: Yes
Scheduled: No
End: No

Reciprocity | Gift

Touch Point Two

Type: outbound
Sensitive: Yes
Out Of Hours Delay: Yes
Scheduled: No
End: No

Campaign Name	Scheduled	Sender Identity	Modified	Cost	Segment	Touchpoints	Status
WINTER COLLECTION	START: 10/12/2020 11:00 am END: --	661 455 773 8881	By: Jane Smith DATE: 10/12/2020 11:00 am	\$350.40	2000	12	COMPLETED
SPRING COLLECTION	START: 10/12/2020 11:00 am END: --	661 455 773 8881	By: Jane Smith DATE: 10/12/2020 11:00 am	\$350.40	2000	12	ACTIVE
SUMMER COLLECTION	START: 10/12/2020 11:00 am END: --	661 455 773 8881	By: Jane Smith DATE: 10/12/2020 11:00 am	\$350.40	2000	12	PAUSED

Dashboard

CREATE A CONVERSATION

Conversations

Search Download Filters

Name	Type	From	Contacts	Transition Email	Status	Actions
My Convo Name 1	Email Cleanse	61466777222	My Contact List 1	admin@greenpeace.com	Active	...
My Convo Name 2	Credit Card Decline	61466777999	My Contact List 2	admin@greenpeace.com	Active	...
My Convo Name 3	Email Cleanse	161466777222	My Contact List 3	admin@greenpeace.com	Completed	...
My Convo Name 4	Survey	61466777888	My Contact List 4	admin@greenpeace.com	Removed	...

sendsei

MY CAMPAIGNS

CREATE A NEW CAMPAIGN

Enter your campaign details.

CAMPAIGN NAME

Autumn Collection

SENDER IDENTITY

Sender Name: Amy Jones

Business Name: Royal Fashion

Optical Number: 61 462 883 444

BACK

SAVE

sendsei

MY CAMPAIGNS

CREATE A NEW CAMPAIGN

Select your touchpoint experience.

EMAIL CLEANSE

Update and collect emails

SEND BROUCCHE

Send a Simple SMS Message

BACK

SAVE

sendsei

MY CAMPAIGNS

CREATE A NEW CAMPAIGN

Enter your campaign details.

CAMPAIGN NAME

Autumn Collection

SENDER IDENTITY

Sender Name: Amy Jones

Business Name: Royal Fashion

Optical Number: 61 462 883 444

BACK

SAVE

Dashboard

Create a conversation

Select a conversation type

Email Cleanse

Credit Card Decline

Email Cleanse

Primer

Dashboard

Create a conversation

Add your conversation details

CONVERSATION NAME

My First Convo

CONVO NAME

Sender Name

PERSONAL TRANSITION EMAIL

amy@greenpeace.com

TOOL

1 Contact List

PERSONAL NAME

Amy

BACK

NEXT

Dashboard

Create a conversation

Select who you would like to send to.

IF YOU CANNOT FIND YOUR LIST NAME, YOU CAN UPLOAD CONTACTS THROUGH THE TOUCHPOINT APP

GO My New Contact List

BACK

SAVE

Burst Satisfaction Campaign

Back

Survey Touchpoint Insights

Last 7 Days

Download Report Refresh Filter

17 Total Sent

0 Bounced

0 Pending

17 Delivered

Goal

41.2% Goal Success

ENG 7

ANSWER 2 8

ANSWER 1 7

Transition Performance

4 Transitions

Operator Status

For Review 3

In Progress 1

Resolved 32

Contact Response Timeline

As of 1 May 2022, 09:41 AM

Replies Link Hits

Replies 15

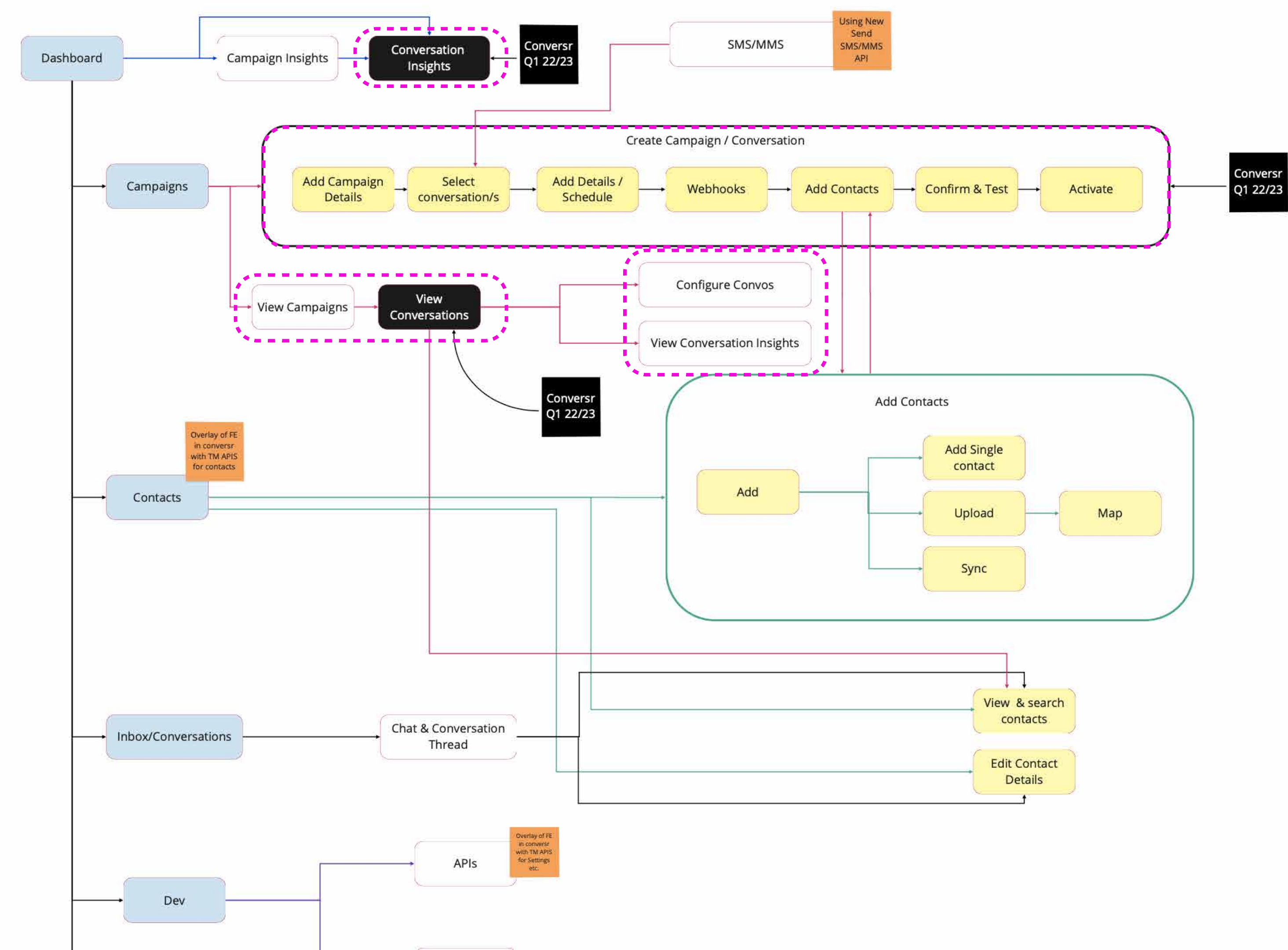
Opt Outs 0

Response Rate 100%

Link Hits 0

Activity

Information architecture



Key

- Domains Main Screens
- Panel/Modal Micro Tasks
- Module Micro Apps

BETA Version

The goal is to get value to customers quickly. The scope was broken down into 3 iterations.

Create - Create Conversation

Campaign Containers View, Pause, Delete conversations, Add a sender ID.

Engage - Live Agent

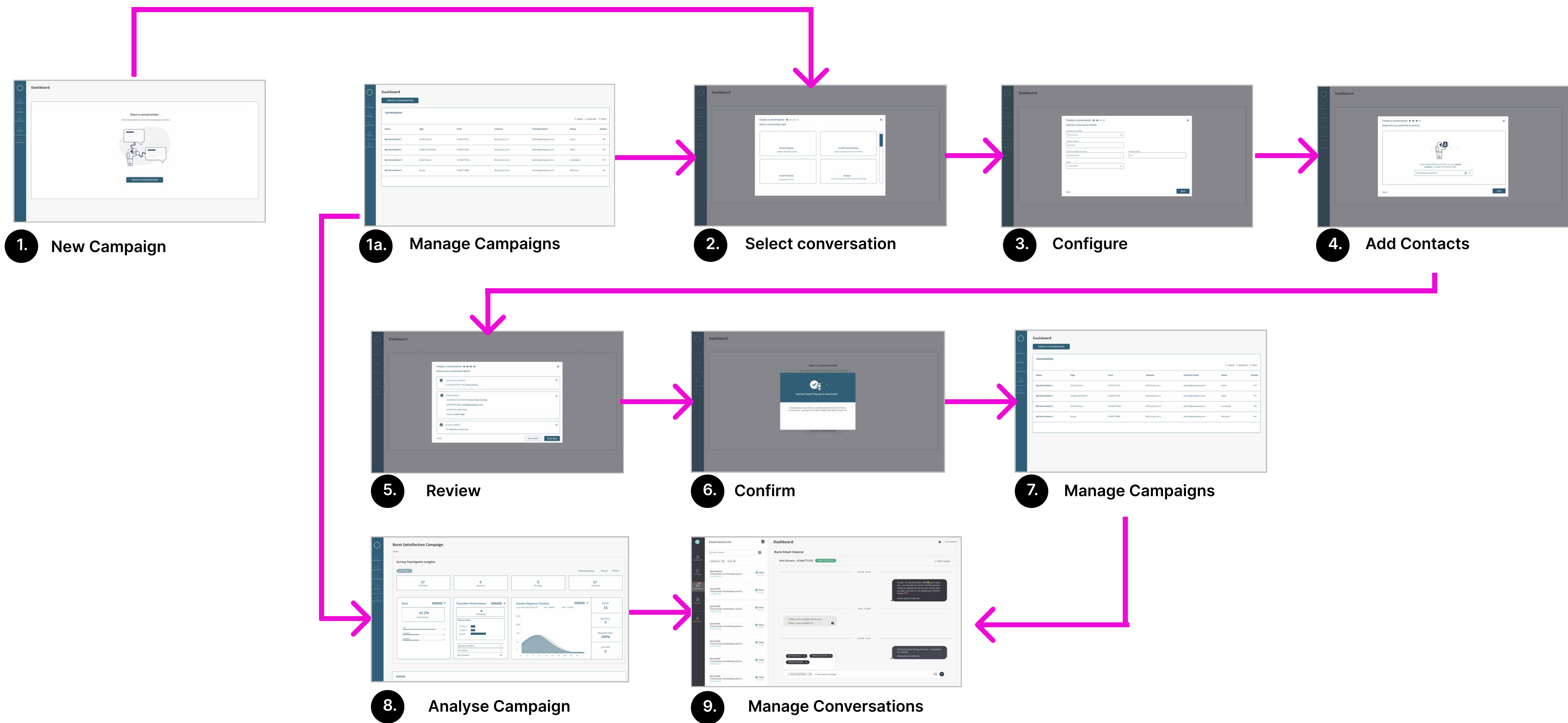
Manage transition messages

Manage - Conversation Insights

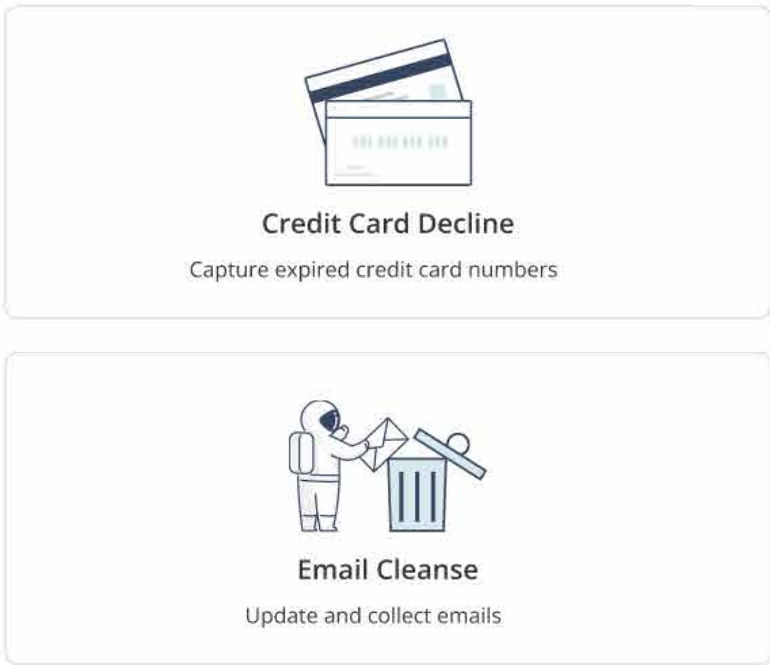
View Conversation insights

DESIGN PHASE: DESIGNING LOFI'S FOR USER TESTING

Create Campaigns approach

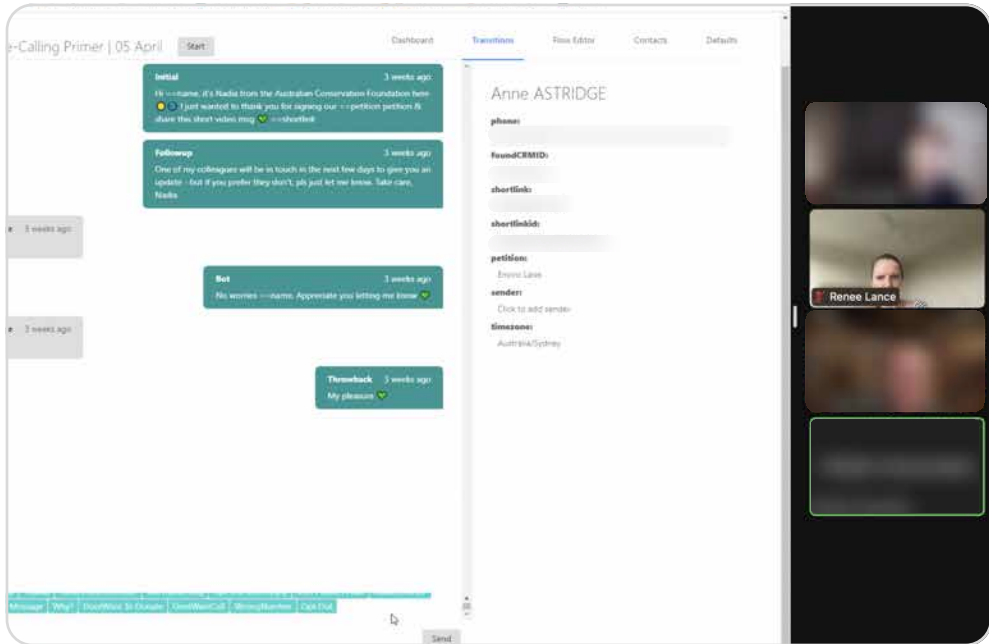


User testing results



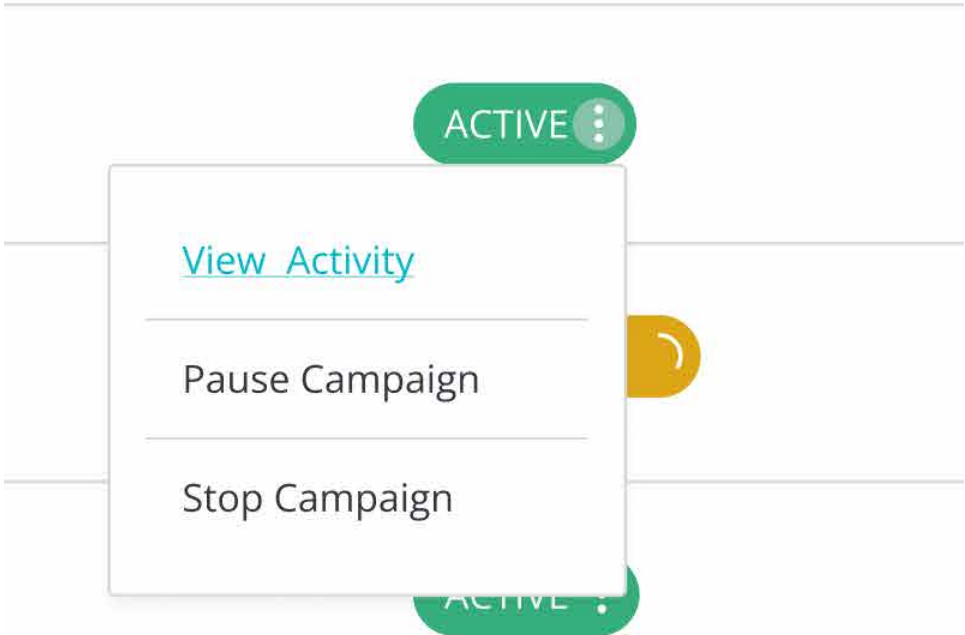
Template conversations were simple to use

This was really successful. A user who had never used the system took only 3 minutes to create an “Email Cleanse” conversation (if contacts were all valid). Currently it takes 15 minutes and simple message users is approximately 20 min.



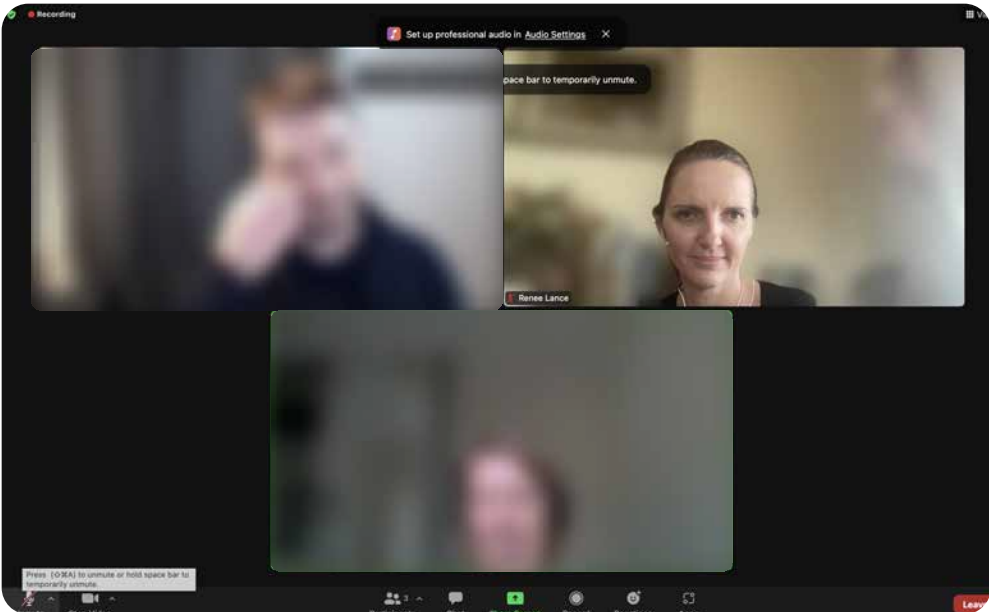
Blockers with responding to messages

Testing our ALPHA app we found intents diverting to manual response, third party integrations corrupting messages, inability to find information in conversation threads and interaction issues with the confirm screens for reply actions.



Preference to pause campaign in the status chip

In Sendsei our previous functional prototype, the design pattern to pause a campaign was confusing. Users clicked on a label which had no actions. So the choice was to remove the action from the configuration panel and add it to the status chip.



OOTB Filters were confusing

We tested Low-fi prototypes and users loved the data visualisation. We had user testing from a functional user test with Looker OOTB for Simple messages and identified that we need to use API and custom UX and build filters within a popover or a menu.

DEVELOP PHASE: HI FI DESIGNS FOR DEVELOPMENT

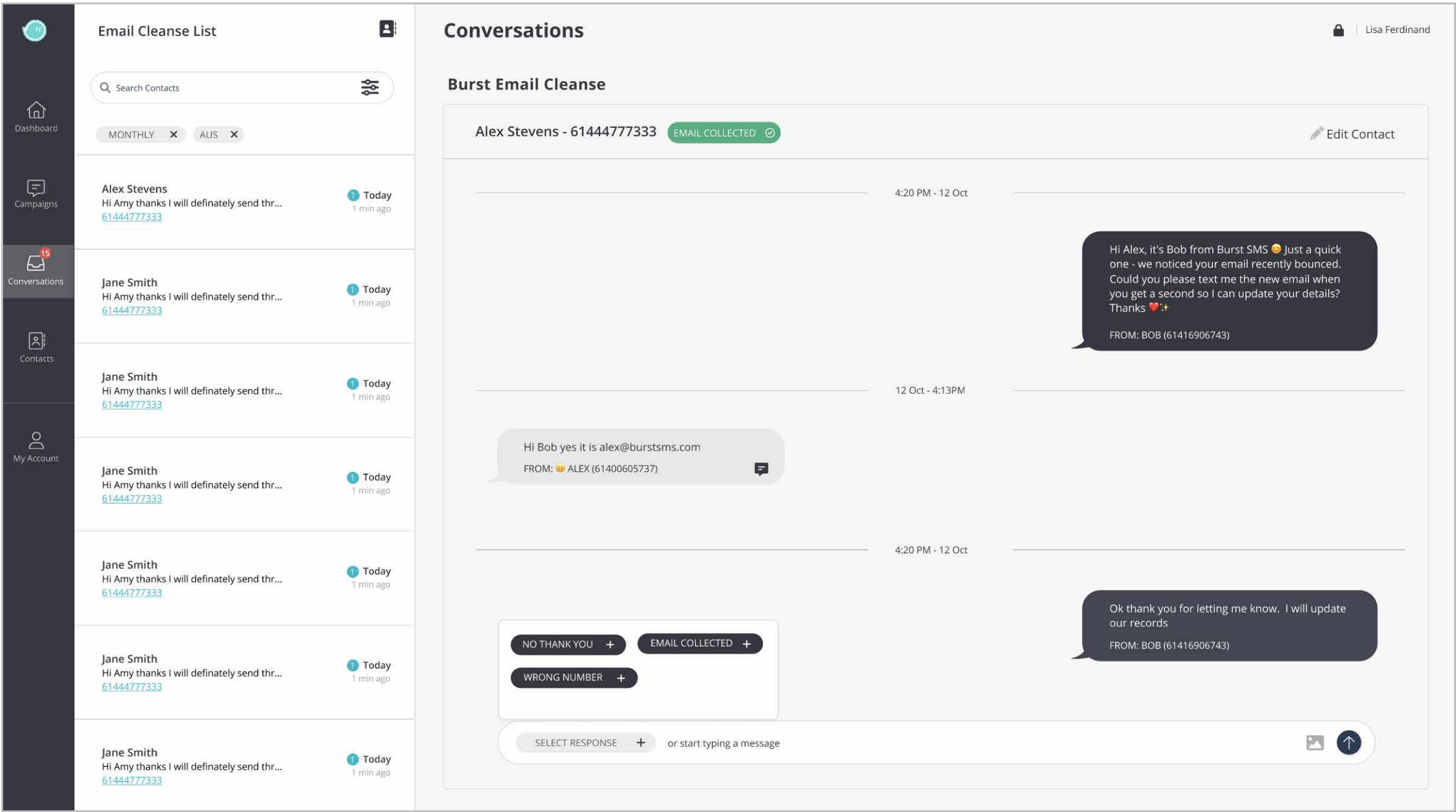
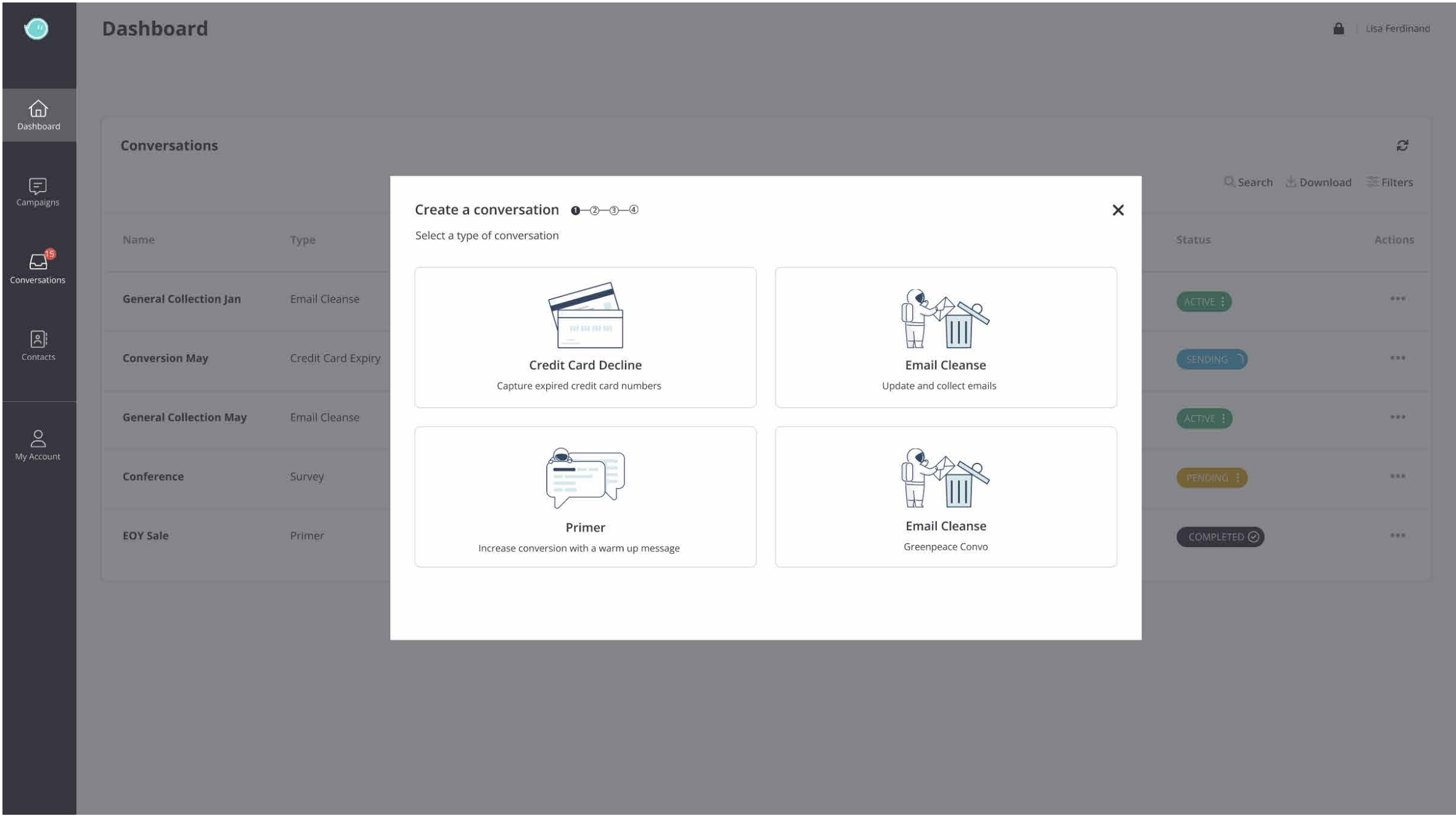
Final design

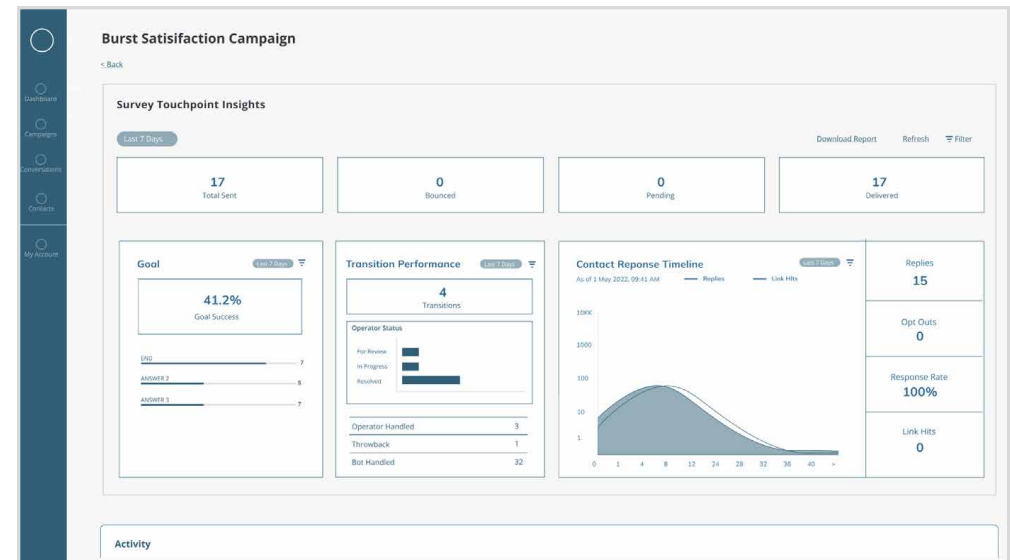
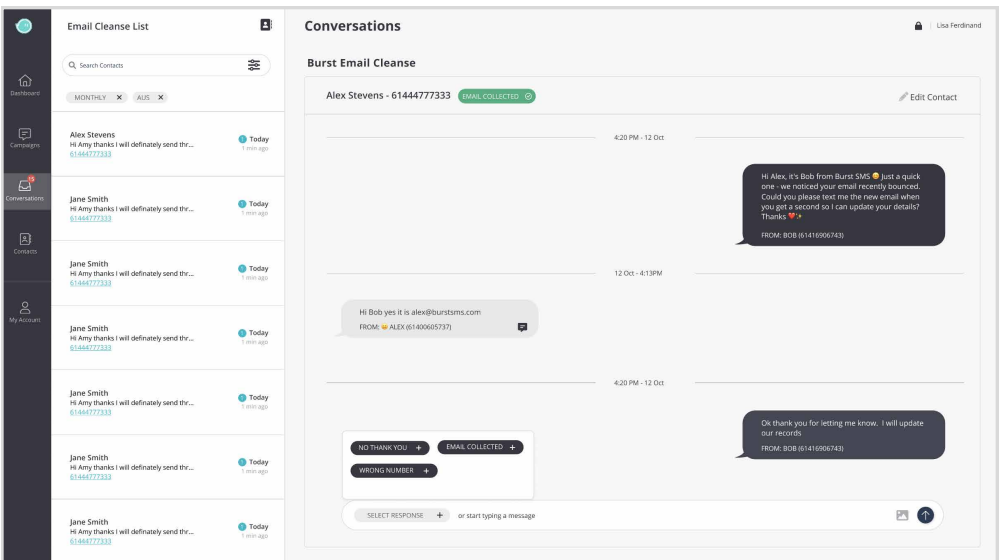
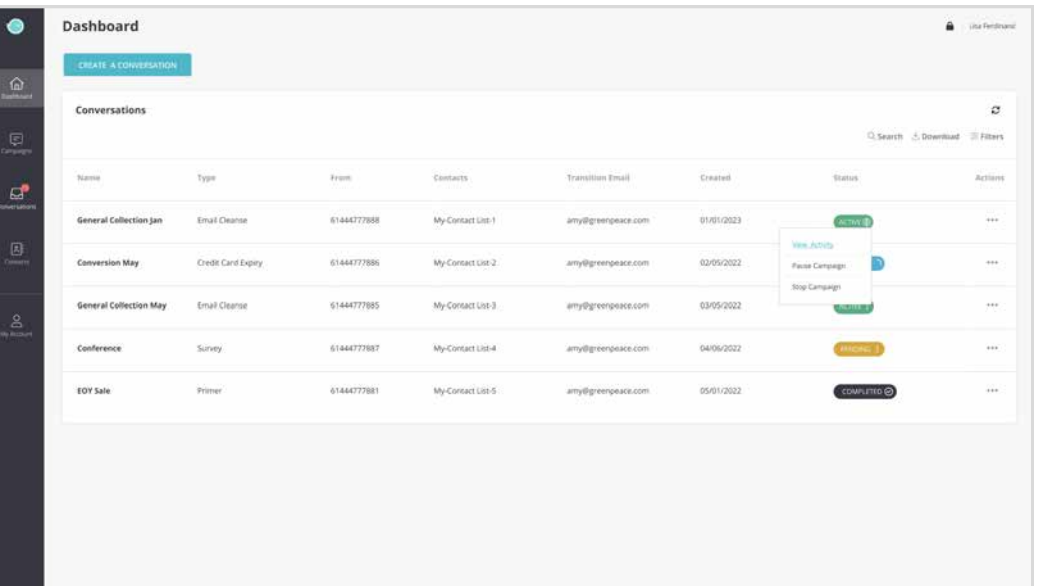
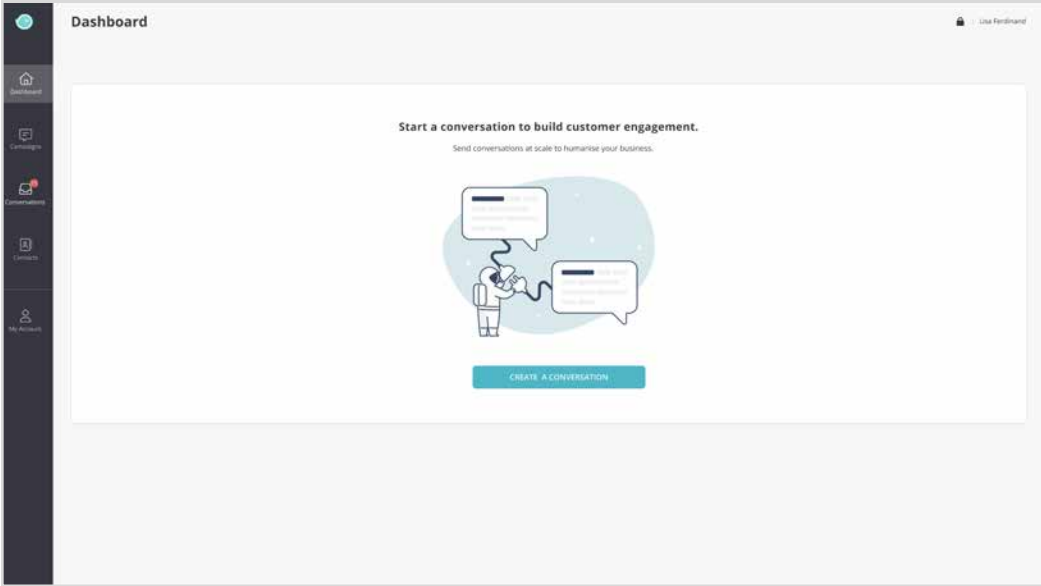
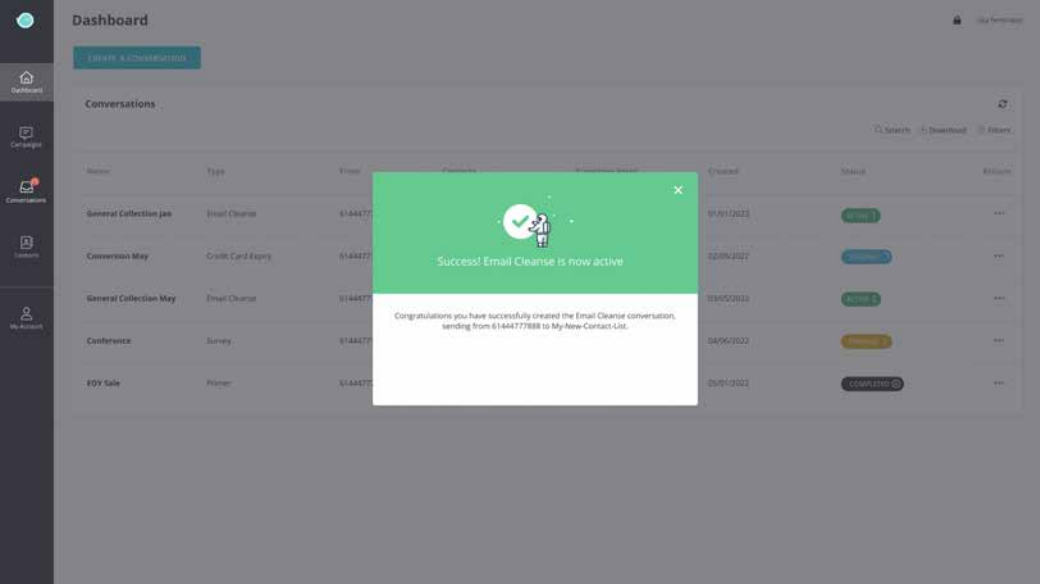
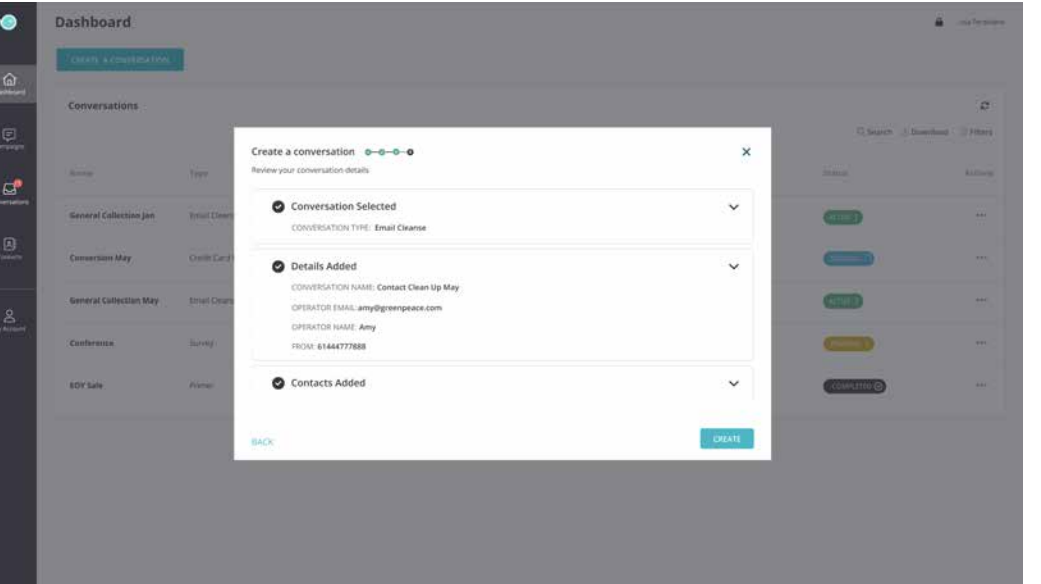
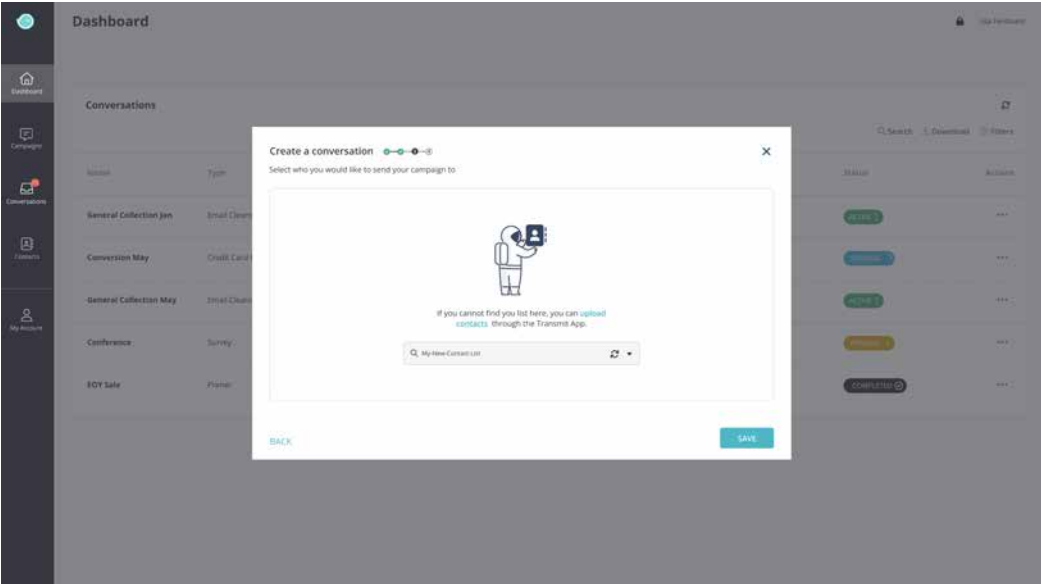
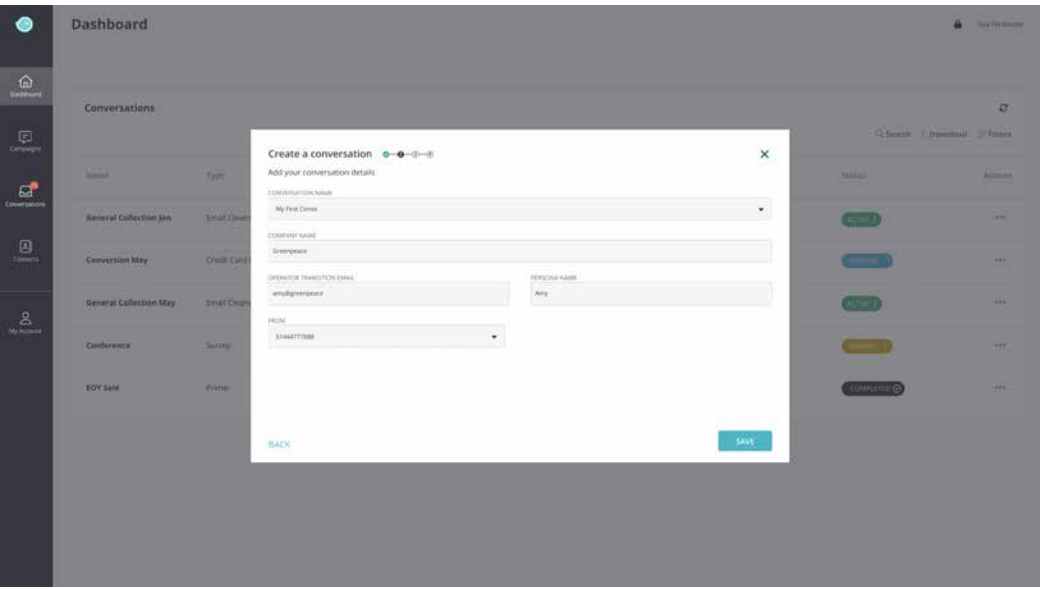
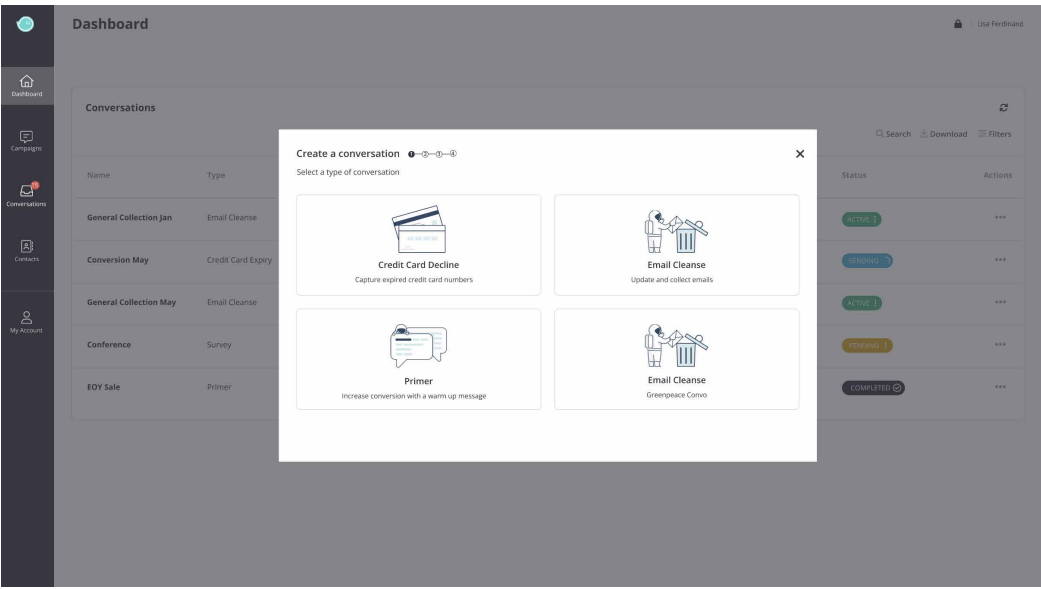
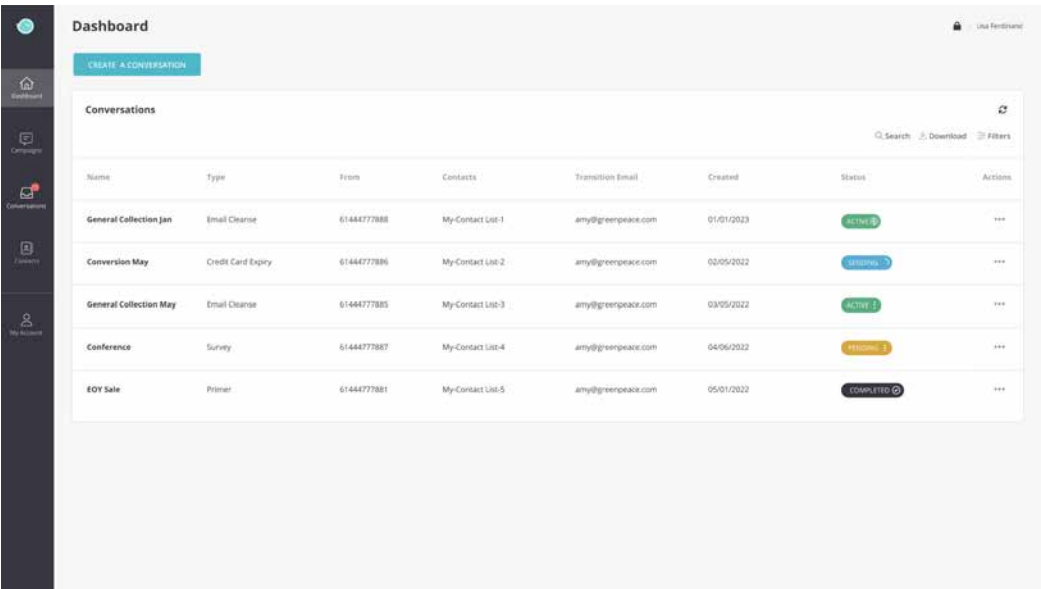
Campaign containers & AI conversations templates

This should be simple and easy to use. User should be able to see at a glance if there any problems with their campaign and be able to take immediate actions.

Live Agent improvements

Transition operators should be able to reduce the amount of manual responses with better defined intents and clearer conversation threads to know how to respond. Good filters will speed up contact search.





Create a Conversation Flow

The Create Conversation flow is the first version for BETA campaign containers.

The Create Conversation empty state is defined for BETA version. Once we have developed dashboard insights and automated onboarding then this screen will be decommissioned.

Live Agent & Insights release for next iteration

Insights required additional testing of the filters with users to refine interactions.

DEVELOP PHASE: WORKING IN TRIADS WITH SQUAD MEMNBERS

Collaboration

Jam Workshops with Engineering and Conversation Designers

google.com/mail/u/0/#search/wine+selectors/FMfcgxwLIZwFTdxtPzTskHdCLPNvW

Morning Zeljko ☀️ it's Vanessa from **Wine Selectors** 🍷 here. I hope you're enjoying your subscription with us. I noticed you're still receiving your invoices in the post, & was wondering if you'd like me to email them to you instead? I can email them to you to make things a bit easier for you?

Agent Follow Up (01:40pm - 20 Apr)
If you could let me know either way, that would be super. Thanks so much 😊 Vanessa

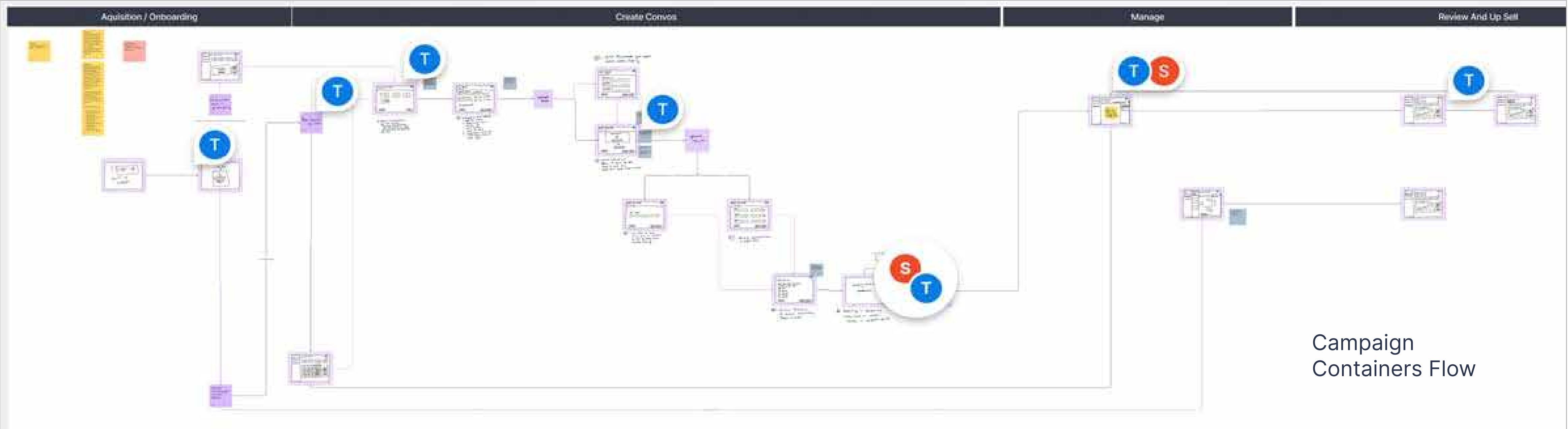
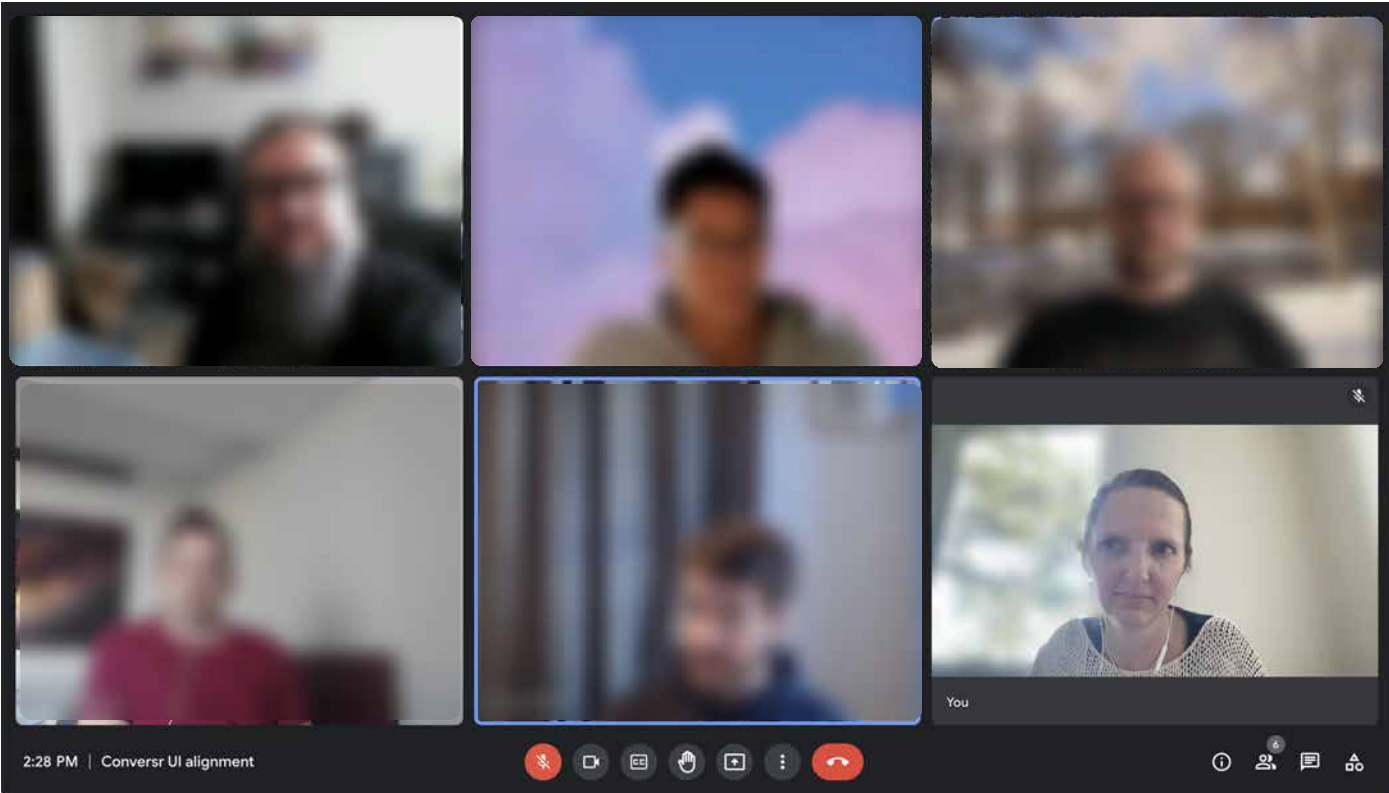
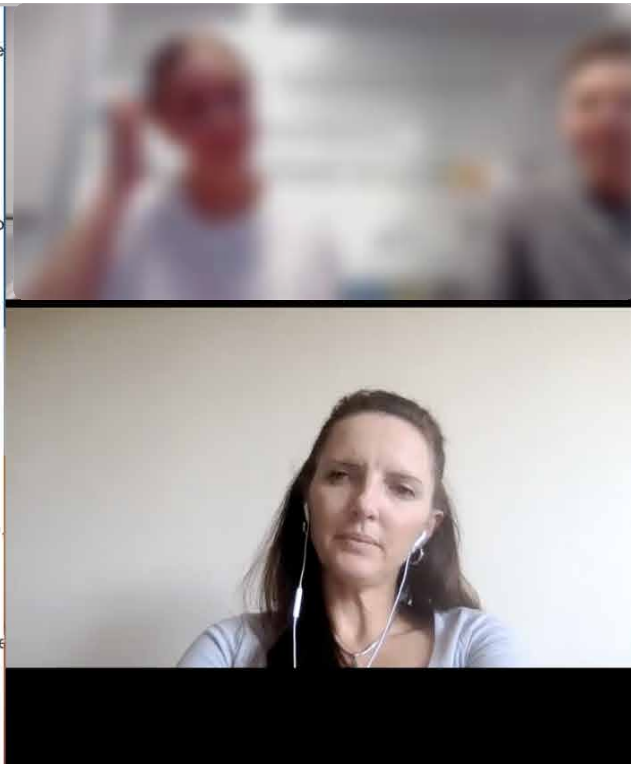
Agent Follow Up (02:42pm - 22 Apr)
Hi Zeljko, just thought I'd quickly follow up in case you missed my last text. Just wondering if you'd be happy for me to start sending your invoices to your via email instead of post? If you can organise it for you, that would be amazing. Thanks again, Vanessa

Zeljko (02:49pm - 22 Apr)
Vanessa, unfortunately, I do not have an email address.

Response options
Click a reply option below to prompt the relevant response from Agent and reinsert them back in to the conversation.

1. [Mark as optout](#)
2. [Reply with ManualWrongNumber message:](#) "So sorry! Thanks for letting me know, I'll update my records."
3. [Reply with Thank You message:](#) "My pleasure 🍷"
4. [Reply with Tried Calling message:](#) "Hi Zeljko, one of my colleagues just tried calling but was unable to get through. Is now a good time, or would another time suit you better."
5. [Mark as EscalateToWineSelectors](#)
6. [Reply with Yes message:](#) "Ok - thanks for that. Just wondering what your best email is? If you can text it to me I'll update your details now."
7. [Reply with No message:](#) "No worries Zeljko. Appreciate you letting me know. Take care"
8. [Enter and reply with PreferEmailCaptureEmailSMS message:](#) "Perfect - thanks for that. I'll sort that out & switch you over now. If you need my help with anything else, please let me know soon"

Send an SMS message back to the contact by replying to this email.



DEVELOP PHASE: DELIVERING DESIGNS FOR DEVELOPMENT

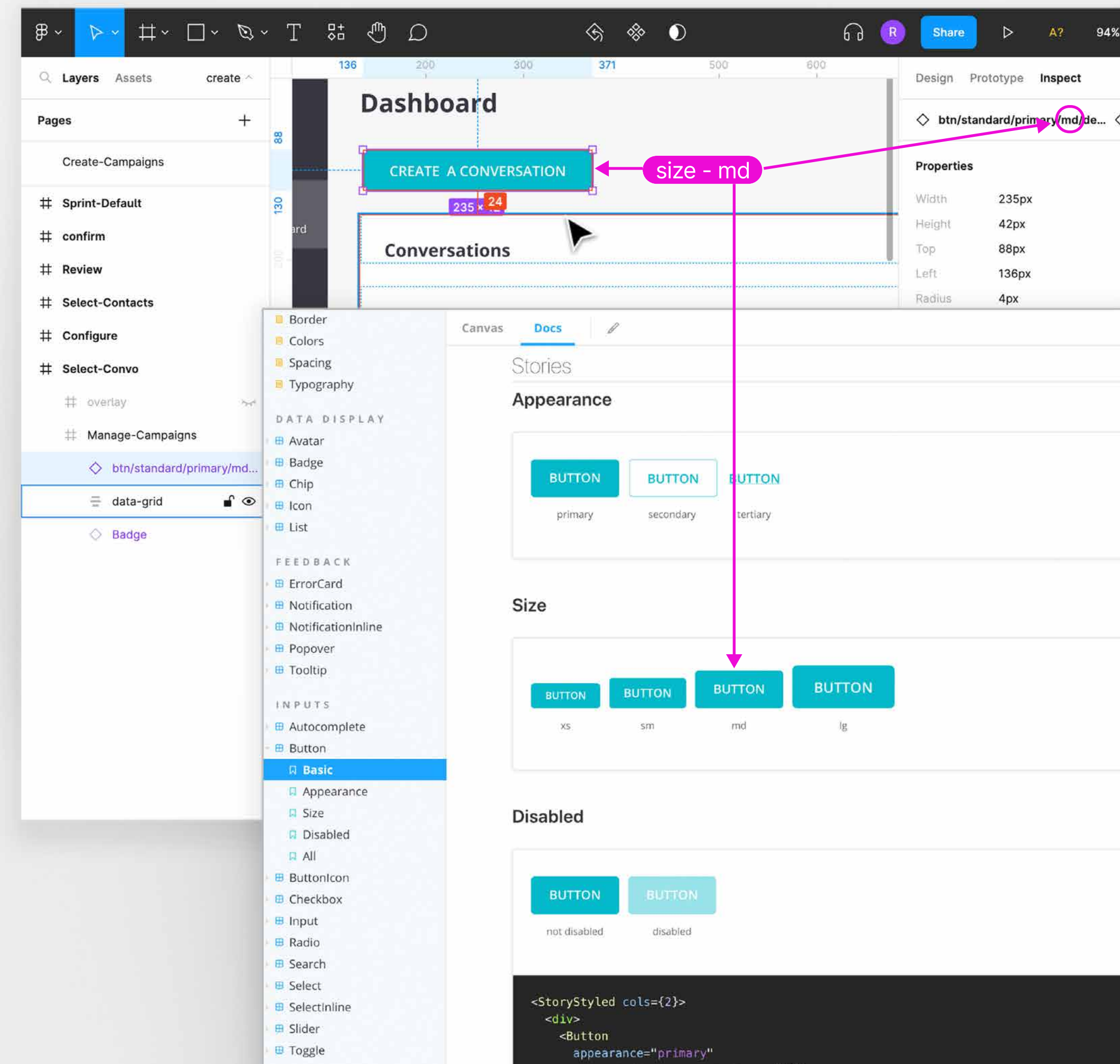
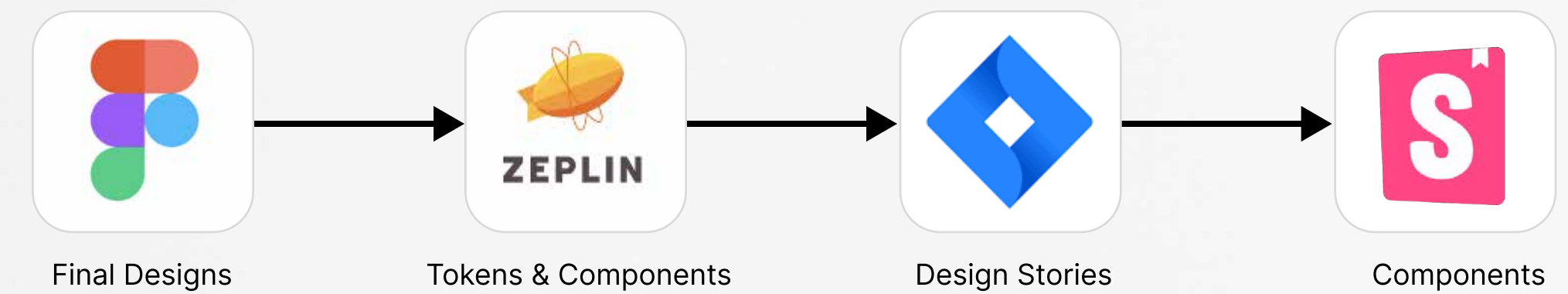
Design handoff

I work closely with engineering, product managers, customer success and marketing and have a lean UX philosophy and process. Along with daily stand ups, we also had with engineering and product feasibility sessions, design reviews and demos.

We were primarily remote workers our processes needed to reflect this such as having a design to dev hand off workflow with Jira and slack or collaborating in Figma Jam, Confluence or Miro.

We use an 80/20 rule of reuse. Having a component library using Material UI as a base framework provided UX consistency. This meant not having to specify design meta-data in Figma files only if there were customisations.





New components were incorporated as part of sprint and had a separate JIRA board which linked to product stories.



THE RESULTS: DID WE SEE ANY IMPACT ON VALUE?

Business impact & value to customers

WHAT WE OBSERVED

Increased Response Rate 	Reduced Send Campaign Time 	Migrated Protobot Users 	Reduced No. Of Campaign Staff 
3% ↑	3-5 min ↓	20% users ↑	1-2 ↓
Increased Engagement Crafted automated conversations improved customer engagement to around 3%.	Reduce user time User time to create a conversation was reduce down from 10 to 15 min.	Increased Users We had 20% of customers confirmed for migration in first iteration. By 3rd iteration 80% would be migrated.	Reduce Campaign Costs Staff required to manage a campaign dropped from 5 to 9 down to 1 to 2. Savings estimated at \$200K - 450K.

Note: Cost savings to customers is an estimate based on approximate number of 4 - 6 weeks per campaign and an estimate on approximate salaries of \$100K for a campaign manager.

THE RESULTS: WHAT OUR CUSTOMERS SAID

Customer feedback

Conversation Templates - Credit Card Decline

“Our internal call centre costs for chasing declined payments have halved saving us hundreds of thousands in costs every year ”

“Credit card solution has improved supporter retention... lifting our revenue...it’s more than 500% effective than any other SMS solution”

Live Agent

“Using transitions for operators has meant we have gone from 9 people down to 2 for managing responses.”

Thank You 😊

