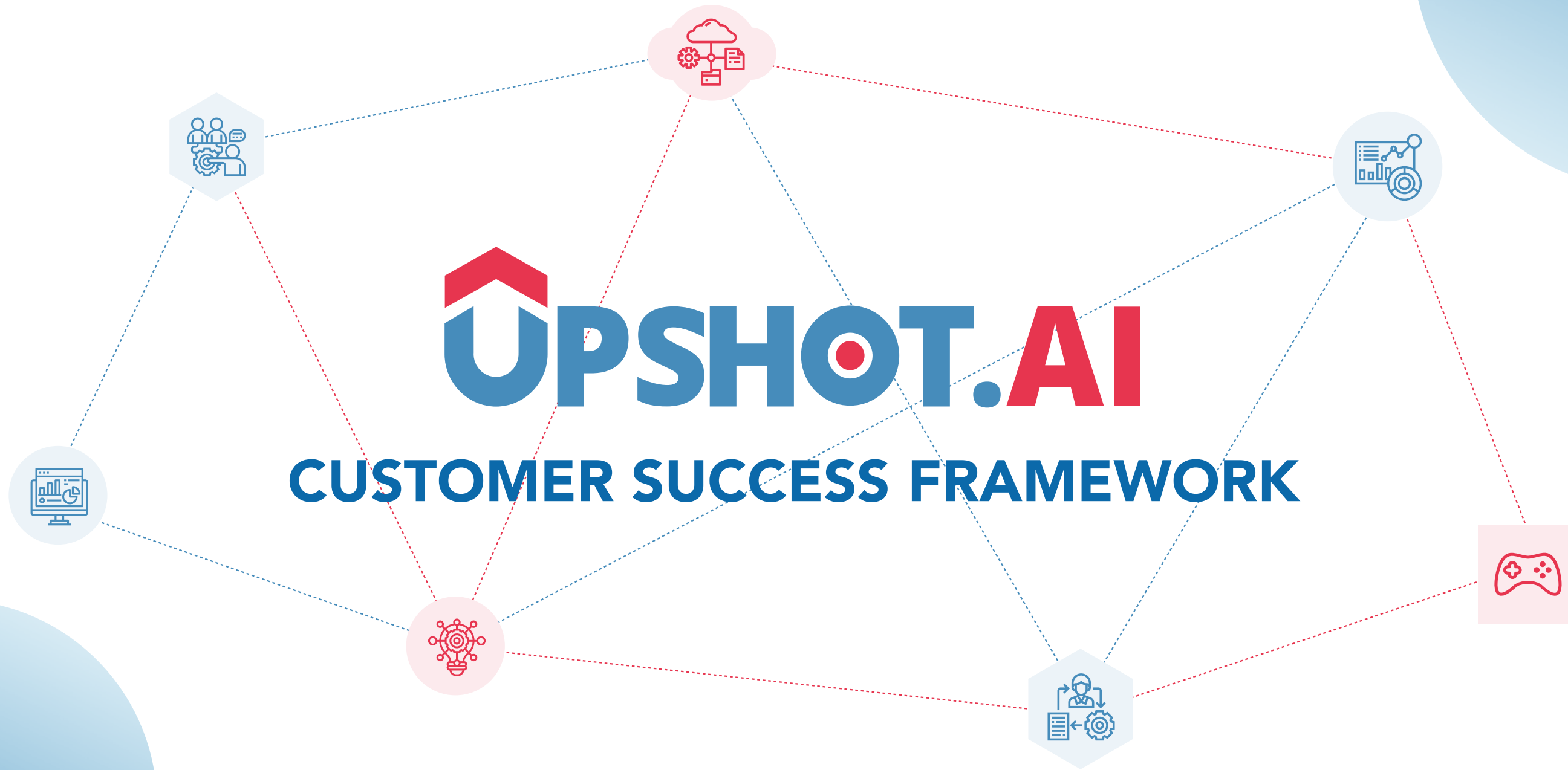


# UPSHOT.AI

## CUSTOMER SUCCESS FRAMEWORK



## **CUSTOMER SUCCESS OPERATIONS:**

To influence and move the needle on user engagement for an app or website, a business needs two things: a powerful multi channel analytics & user engagement platform and the right level of expertise to use the platform capabilities to its maximum to deliver results quickly.

We bring nearly 200 man years of experience and expertise in helping our clients build highly engaged user bases using our platform Upshot.ai. We have codified all that experience into a comprehensive seven-part approach that helps you to get off the ground with confidence and build an engaged user base.

### **PART I - BUILDING A CUSTOM ANALYTICS FRAMEWORK**

Planning custom analytics events, funnels, KPIs & reports.

### **PART II - DESIGNING A USER ENGAGEMENT FRAMEWORK**

Planning user segments & Upshot.ai engagement options to be leveraged.

### **PART III - IMPLEMENTING THESE FRAMEWORKS IN YOUR PRODUCT**

Working with your developers to code the custom analytics events using Upshot.ai SDK, ensuring that the analytics and engagement framework is accurately put in place and functioning as intended.

### **PART IV - CONFIGURING THE DASHBOARD**

Arranging reports, trends, analytics, segments, funnels, etc. in a single place for you to monitor.

## **PART V - USER ENGAGEMENT PLANNING & STRATEGISING**

Diving into the data and extracting insights, coming up with engagement campaign hypotheses that leverage human behavioral psychology and techniques like gamification, seeking approval.

## **PART VI - ENGAGEMENT LIVE-OPS & REPORTING**

Send out the campaigns to the intended segments, watching the results roll in, create and share progress as well as learnings for the next round of campaigns.

## **PART VII - WEEKLY HIGHLIGHTS & BESPOKE ANALYSIS**

A comprehensive weekly status report that packs the activities carried out, results, lessons, observations, trends, etc., bringing out hard-to-spot insights via Machine Learning and deep data science.

## **YOU WILL WORK WITH AN UPSHOT.AI CUSTOMER SUCCESS TEAM COMPRISING OF:**

**PRODUCT SPECIALIST** - An expert in Upshot.ai, they design and execute campaigns across the customer lifecycle that create user engagement. They will provide the leadership for the client account, and will get things done within the Upshot.ai team as needed. They are regularly trained on user behavior and psychology based strategies.

**DESIGNER** - They will design any campaign creatives such as images, graphics, etc.

**DATA SCIENTIST** - They are the data experts, diving deep to come up with patterns and trends. They use a range of techniques to do this, including machine learning algorithms and various models.

HELP US UNDERSTAND YOUR PRODUCT IN-DEPTH - SO WE KEEP THE BIG PICTURE IN MIND AS WE WORK WITH YOU

NAME	FORMAT	CATEGORY	REVENUE RELATED?	TARGET AUDIENCE (Mention all)	WHY SHOULD THEY USE IT? (UNDENIABLE VALUE PROP)	WHAT WILL THEY ACCOMPLISH? (USER-CENTRIC GOALS)	FEATURES	KEY BEHAVIOURS EXPECTED (ACTIONS USER SHOULD DO)	EXPECTED USAGE FREQUENCY

## BUILDING USER PERSONAS HELPS US TO GET INTO THEIR SHOES WHILE CREATING ENGAGEMENT STRATEGY

<b>PERSONA NAME</b>	
<b>AGE</b>	
<b>EDUCATIONAL LEVEL</b>	
<b>INCOME LEVEL</b>	
<b>TECH SAVVY</b>	
<b>LANGUAGE PREFERENCES</b>	
<b>LOCATION</b>	
<b>DESIRES / DREAMS</b>	
<b>MOTIVATIONS</b>	
<b>FEARS</b>	
<b>ANXIETIES</b>	
<b>PRODUCT PERCEPTION</b>	
<b>PRODUCT USAGE TRIGGERS</b> (when, where, why they think of using the product)	

**THE USER LIFECYCLE TIES ALL ENGAGEMENT CAMPAIGNS TOGETHER.  
IT ALSO HELPS SPOT OPPORTUNITIES TO AUTOMATE ENGAGEMENT & DRIVE KPIs.**

FOR USER TYPE: <describe target audience>	STAGE 1 (ENTER NAME)	STAGE 2 (ENTER NAME)	STAGE 3 (ENTER NAME)	STAGE 4 (ENTER NAME)	STAGE 5 (ENTER NAME)
BRAND TOUCHPOINTS					
DOING					
THINKING					
FEELING					
LOCATION					
DATA TO BE CAPTURED - HIGH LEVEL					
KPIs					
USER FEEDBACK VERBATIM					
ENGAGEMENT OPPORTUNITIES					
MOMENTS OF DELIGHT - OPPORTUNITIES					

## DEFINE YOUR PRODUCT GOALS AND KPIs HERE

S.NO	GOALS	METRICS				STATUS
		STARTING VALUE	AS MEASURED ON	EXPECTED VALUE	EXPECTED BY	
1	Increase first time user registrations					IN-PROGRESS ▼
2	Increase bookings					MET ▼
3	Increase day 7 retention					FAILED ▼
4	Increase newsletter subscriptions					▼
5	Increase referrals					▼
6	Reduce cart abandonments					▼
7	Increase revenue					▼
8	Increase ARPU					▼
9	Increase Paying users					▼
10	Decrease refunds					▼

## CUSTOM REPORTS TO TRACK PROGRESS TOWARDS GOALS

S.NO	REPORT NAME	TYPE OF REPORT	REPORT ATTRIBUTES
1	Day wise report on categorywise purchases	STACKED BAR CHART ▼	X-axis- Date, Y-Axis - Number of purchases stacked by Categories
2	Day wise report on number of cancellations	STACKED BAR CHART ▼	X-axis- Date, Y-Axis - Number of cancellations stacked by car type
3		▼	
4		▼	
5		▼	
6		▼	
7		▼	
8		▼	
9		▼	
10		▼	



## LIST THE MOST IMPORTANT FUNNELS TO MEASURE THEIR THROUGHPUT AND TARGET DROP-OFFS

S.NO	REPORT NAME	JOURNEY DESCRIPTION
1	<b>Purchase Journey</b>	Completes registration --> Browse categories -->Select product--> Add to cart -- > MakePayment --> Confirmation
2		
3		
4		

## LIST THE CUSTOMER SEGMENTS THAT HELP IN BETTER TARGETING & DEEPER UNDERSTANDING OF BEHAVIOR

S.NO	SEGMENT NAME	JOURNEY DESCRIPTION
1	<b>Cartabandonment</b>	User who add item to the cart but did not make a purchase
2	<b>Dormant Users</b>	Users who installed the App AND did not visit the app for more than 3 days
3	<b>Preimuim Users</b>	User who made a purchase more than 3 times in a month
4		

### USER PROFILE ATTRIBUTES TO BE CAPTURED DURING SDK INTEGRATION

	ATTRIBUTES	ATTRIBUTE VALUE TYPE	PROFILE TYPE	DESCRIPTION
Registration	Email	String ▼	Predefined ▼	
	FirstName	String ▼	Predefined ▼	
	Appuid	String ▼	Predefined ▼	
	LastName	String ▼	Predefined ▼	
	UserName	String ▼	Predefined ▼	
Login	Email	String ▼	Predefined ▼	
	Appuid	String ▼	Predefined ▼	
	UserName	String ▼	Predefined ▼	
Custom Profile Attributes	InReviewAlbumsCount	Numeric ▼	Others ▼	
	RejectedAlbumsCount	Numeric ▼	Others ▼	
	PublishedAlbumsCount	Numeric ▼	Others ▼	
	DraftedAlbumsCount	Numeric ▼	Others ▼	
	PermanentlyRejectedAlbumsCount	Numeric ▼	Others ▼	
	Coinbalance	Numeric ▼	Others ▼	
	SwapCount	Numeric ▼	Others ▼	
	ClubsSubscriptionsCount	Numeric ▼	Others ▼	
	C2CSubscriptionsCount	Numeric ▼	Others ▼	
	CoinsSpentCount	Numeric ▼	Others ▼	
	MyAlbumsCount	Numeric ▼	Others ▼	
	MySubscriptionsCount	Numeric ▼	Others ▼	
	IsGuestUser = { Yes   No }			
	StickersCount	Numeric ▼	Others ▼	
Logout	Appuid	Numeric ▼	Predefined ▼	Send as empty string

### USER PROFILE ATTRIBUTES - TESTING RESULTS

iOS		Android		Web	
STATUS	COMMENTS	STATUS	COMMENTS	STATUS	COMMENTS
Pass ▼		Pass ▼		Pass ▼	
Pass ▼		Pass ▼		Pass ▼	
Pass ▼		Pass ▼		Pass ▼	
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Pass ▼		Pass ▼		Pass ▼	
Pass ▼		Pass ▼		Pass ▼	
Pass ▼		Pass ▼		Pass ▼	
Pass ▼		Pass ▼		Pass ▼	

## SCREEN VIEWS TO BE CAPTURED DURING SDK INTEGRATION

SCREEN NAME	DESCRIPTION

## SCREEN VIEWS - TESTING RESULTS

iOS		Android		Web	
STATUS	COMMENTS	STATUS	COMMENTS	STATUS	COMMENTS
Pass		Pass		Pass	
Pass		Pass		Pass	
Pass		Pass		Pass	
Pass		Pass		Pass	
Pass		Pass		Pass	
Pass		Pass		Pass	
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Pass		Pass		Pass	

CUSTOM ATTRIBUTES TO BE CAPTURED DURING SDK INTEGRATION			
EVENT NAME	ATTRIBUTES	VALUE TYPE	DESCRIPTION
To-Do	CourseName={AI}	String ▼	
	SignInFrom = {Google   Facebook   SignIn}	String ▼	
CourseCOmplete	CourseName={AI}	String ▼	
CourseStart		String ▼	
		String ▼	
		String ▼	
Share		String ▼	
PurifierOn		String ▼	
		String ▼	
		String ▼	
		String ▼	
ClaimCoins	Amount	Numeric ▼	
	ClaimFrom	String ▼	
ClaimPacks	ClaimFrom	String ▼	
	AlbumName	String ▼	
	AlbumId	String ▼	
	PacksCount	Numeric ▼	
	AlbumType	String ▼	
Invite	AlbumName	String ▼	
	AlbumId	String ▼	
	AlbumType	String ▼	
StartCreatingAlbum	AlbumName	String ▼	
	AlbumId	String ▼	

CUSTOM ATTRIBUTES - TESTING RESULTS								
iOS			Android			Web		
PAYLOAD	STATUS	COMMENTS	PAYLOAD	STATUS	COMMENTS	PAYLOAD	STATUS	COMMENTS
	Pass ▼			Pass ▼			Pass ▼	
	Pass ▼			Pass ▼			Pass ▼	
	Pass ▼			Pass ▼			Pass ▼	
	Pass ▼			Pass ▼			Pass ▼	
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	Pass ▼			Pass ▼			Pass ▼	
	Pass ▼			Pass ▼			Pass ▼	

### CUSTOM ATTRIBUTES TO BE CAPTURED DURING SDK INTEGRATION

EVENT NAME	ATTRIBUTES	VALUE TYPE	DESCRIPTION
CheckoutAlbum	AlbumDuration	Numeric ▼	
	Amount	Numeric ▼	
	AlbumId	String ▼	
	NumberOfStickers	Numeric ▼	
	NumberOfPages	Numeric ▼	
	State = {New   Edit}	String ▼	
	AlbumType	String ▼	
	TemplateName	String ▼	
	TemplateId	String ▼	
ChooseLayout	LayoutName	Numeric ▼	
	AlbumName	Numeric ▼	
	Count	Numeric ▼	
	AlbumId	Numeric ▼	
	AlbumType	Numeric ▼	
ChooseBackground	BackgroundName	Numeric ▼	
	AlbumName	Numeric ▼	
	Count	Numeric ▼	
	AlbumId	Numeric ▼	
	AlbumType	Numeric ▼	
SubscriptionStatus	AlbumName	String ▼	
	AlbumId	String ▼	
	Status = {Accept   Reject}	String ▼	
	AlbumType	String ▼	

### CUSTOM ATTRIBUTES - TESTING RESULTS

iOS			Android			Web		
PAYLOAD	STATUS	COMMENTS	PAYLOAD	STATUS	COMMENTS	PAYLOAD	STATUS	COMMENTS
	Pass ▼			Pass ▼			Pass ▼	
	Pass ▼			Pass ▼			Pass ▼	
	Pass ▼			Pass ▼			Pass ▼	
	Pass ▼			Pass ▼			Pass ▼	
	Pass ▼			Pass ▼			Pass ▼	
	Pass ▼			Pass ▼			Pass ▼	
	Pass ▼			Pass ▼			Pass ▼	
	Pass ▼			Pass ▼			Pass ▼	
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	No ▼			No ▼			No ▼	
	▼			▼			▼	
	▼			▼			▼	

TAGS TO BE CAPTURED DURING SDK INTEGRATION	
TAG NAME	DESCRIPTION

TAG VALIDATION - TESTING RESULTS					
iOS		Android		Web	
STATUS	COMMENTS	STATUS	COMMENTS	STATUS	COMMENTS
Pass		Pass		Pass	
Fail		Fail		Fail	
Fail		Fail		Fail	
Pass		Pass		Pass	
Pass		Pass		Pass	
Pass		Pass		Pass	
Pass		Pass		Pass	
Pass		Pass		Pass	
Pass		Pass		Pass	
Pass		Pass		Pass	

ENGAGEMENT ACTIONS TO BE INTEGRATED	
ACTION	STATUS
Survey	Yes ▼
Rating	Yes ▼
Opinion Poll	Yes ▼
InAppMessage	Yes ▼
Tutorials	Yes ▼
Badges	Yes ▼
ScreenTips	Yes ▼
Minigames	Yes ▼
Trivia	Yes ▼
CustomActions	Yes ▼
PushNotifications	Yes ▼
Web notifications	Yes ▼
Email	Yes ▼
WhatsApp	No ▼
Voice Messages	Yes ▼
Rewards	Yes ▼
Ads	No ▼

SCREEN VIEWS - TESTING RESULTS					
iOS		Android		Web	
STATUS	COMMENTS	STATUS	COMMENTS	STATUS	COMMENTS
Pass ▼		Pass ▼		Pass ▼	
Fail ▼		Fail ▼		Fail ▼	
Fail ▼		Fail ▼		Fail ▼	
Pass ▼		Pass ▼		Pass ▼	
Pass ▼		Pass ▼		Pass ▼	
Pass ▼		Pass ▼		Pass ▼	
Pass ▼		Pass ▼		Pass ▼	
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Pass ▼		Pass ▼		Pass ▼	
Pass ▼		Pass ▼		Pass ▼	
Pass ▼		Pass ▼		Pass ▼	

ACTIONS USING DEEPLINKS	STATUS
Push	Yes ▼
In-App Message	Yes ▼
Tutorial	Yes ▼
Badge	Yes ▼
Minigames	Yes ▼

DEEPLINKS TO BE INTEGRATED			
DEEPLINK NAME	DEEPLINK STRUCTURE FOR PUSH NOTIFICATIONS	DEEPLINK STRUCTURE FOR IN-APP ACTIONS	DESCRIPTION
Trending Albums			
Coins Bundle			
PackBundle			
Album Creation			
WebURL			
PushSettings			
Register			

SCREEN VIEWS - TESTING RESULTS								
iOS			Android			Web		
STATUS FOR PUSH	STATUS FOR ACTIONS	COMMENTS	STATUS FOR PUSH	STATUS FOR ACTIONS	COMMENTS	STATUS FOR PUSH	STATUS FOR ACTIONS	COMMENTS
Pass ▼	Pass ▼		Pass ▼	Pass ▼		Pass ▼	Pass ▼	
Fail ▼	Fail ▼		Fail ▼	Fail ▼		Fail ▼	Fail ▼	
Fail ▼	Fail ▼		Fail ▼	Fail ▼		Fail ▼	Fail ▼	
Pass ▼	Pass ▼		Pass ▼	Pass ▼		Pass ▼	Pass ▼	
Pass ▼	Pass ▼		Pass ▼	Pass ▼		Pass ▼	Pass ▼	
Pass ▼	Pass ▼		Pass ▼	Pass ▼		Pass ▼	Pass ▼	
Pass ▼	Pass ▼		Pass ▼	Pass ▼		Pass ▼	Pass ▼	
Pass ▼	Pass ▼		Pass ▼	Pass ▼		Pass ▼	Pass ▼	
Pass ▼	Pass ▼		Pass ▼	Pass ▼		Pass ▼	Pass ▼	



## DATA IMPORT/ EXPORT INTEGRATION

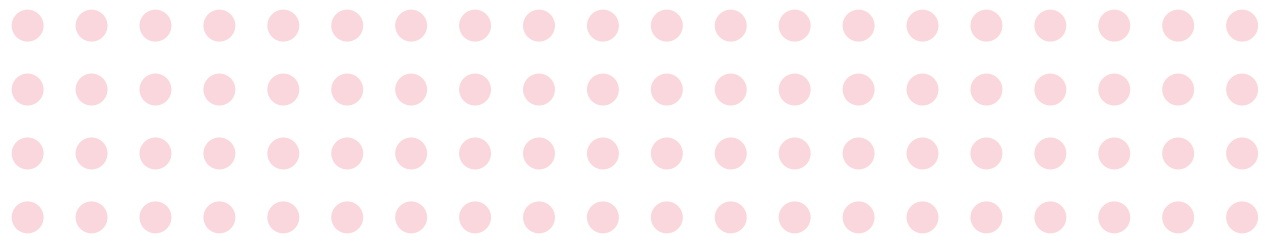
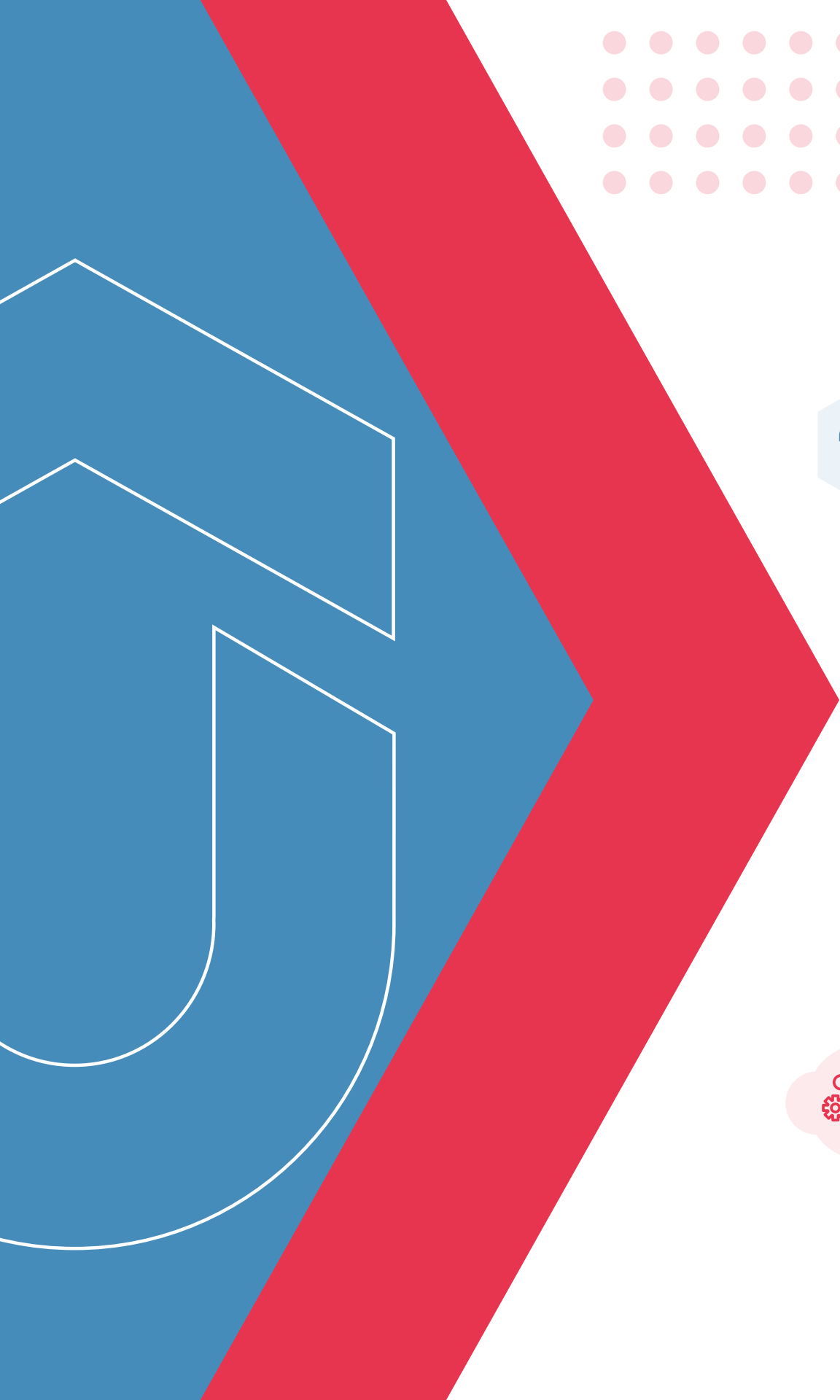
ACTION TYPE	CONTENT	CHANNEL	FREQUENCY	COMMENTS
IMPORT ▼	▼	▼		
EXPORT ▼	▼	▼		
▼	▼	▼		
▼	▼	▼		
▼	▼	▼		
▼	▼	▼		
▼	▼	▼		
▼	▼	▼		
▼	▼	▼		
▼	▼	▼		

## LIST DOWN REPORTS THAT YOU WOULD LIKE TO SEE EVERY WEEK VIA AN EMAIL

S.NO	REPORT NAME
1	Total Revenue / Revenue by each city
2	Car added to the subscription / made the payment & booked the car
3	Car Brand Views by no of Users / Top 3 car brands viewed
4	Product wise views by no of Users / Top 3 products viewed
5	Top Car Booked by each city
6	Subscription details / Course added to Subscription
7	No of Subscriptions by each city
8	No of Reward points spent
9	Top offers utilised
10	Avg Cart / Subscription Value

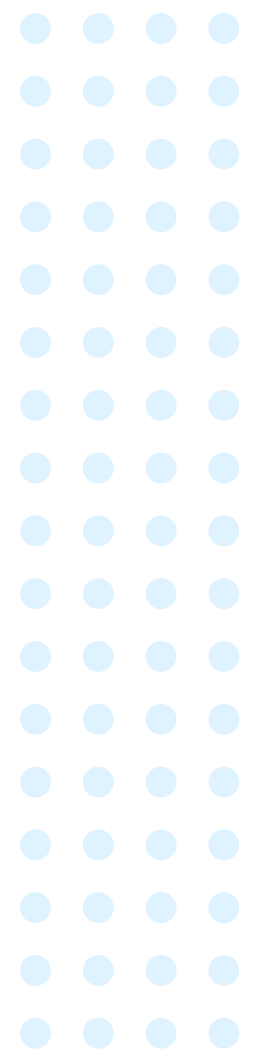
## CAMPAIGN PERFORMANCE ANALYSIS

S.NO	CAMPAIGN NAME	START DATE	END DATE	CAMPAIGN GOAL	TARGETED EVENT	TARGETED ATTRIBUTE	ATTRIBUTE VALUE	COUNT BEFORE CAMPAIGN	CONSIDERED DATES	COUNT AFTER CAMPAIGN	CONSIDERED DATES	IMPACT
				▼								POSITIVE ▼
				▼								▼
				▼								NEGATIVE ▼
				▼								▼
				▼								▼
				▼								NEUTRAL ▼
				▼								▼
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				▼								▼



THANK YOU

**UPSHOT.AI**



For more details please visit [www.upshot.ai](http://www.upshot.ai)

