

Root & Rise Playbook 01: Hair Routine Quiz-to-Welcome Journey

Project status: Independent portfolio practice project

Brand: Root & Rise Hair Care (fictional D2C brand)

Journey: Quiz discovery → consented email capture → personalized routine guidance → Trial Kit or bundle consideration

Version: 1.0

1. Purpose

Help visitors who are unsure where to begin identify a simple hair-care starting routine. The journey uses the 2-minute Hair Routine Quiz to reduce choice overload and provides a relevant, consent-based email follow-up.

This playbook is designed to lead directly to the following Root & Rise website and email assets:

- Hair Routine Quiz landing page and question set
- Quiz result pages for weak-looking hair and frizz/dryness routes
- Product listing page and routine-selection guidance
- Hair Fall Care Bundle page
- 3-Step Trial Kit landing page
- Welcome email and product image cards
- Founder / hair-routine guidance email
- Preference-centre email

2. Business objective

Convert high-intent, first-time website visitors into consented leads and help them take a useful next step: view a recommended routine, start with the Trial Kit, or shop the Hair Fall Care Bundle.

3. Customer objective

“I have concerns such as frizz, dryness, dullness or weak-looking hair, but I do not want a complicated routine or exaggerated promises. Help me choose a sensible starting point.”

4. Audience and segments

Segment	Identification logic	Primary need	Recommended route
Weak-looking / dull hair	Quiz answer indicates weak, thin-looking, dull or weighed-down hair	A simple routine starting point	Strengthening Shampoo + Conditioner; introduce Serum if frizz is also selected
Frizz / dryness	Quiz answer indicates frizz, flyaways, dry or rough-feeling lengths	Softer, more manageable lengths	Shampoo + Conditioner + Serum; introduce weekly Hair Mask
Undecided explorer	“I am not sure” or mixed concerns	Guidance without pressure	Quiz results, routine guide and Trial Kit
Email-consented lead	Provides email and accepts marketing consent	Follow-up guidance	Personalised welcome sequence
On-screen-only quiz user	Does not provide email	Immediate guidance	Results page, product links and sign-up prompt

5. Journey map

Stage	Customer action	Root & Rise response	Asset required	Success signal
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Discover	Sees home-page hero, pop-up or guide CTA	Invites visitor to find a routine	Home hero; pop-up sign-up form	Quiz-start rate
Diagnose	Completes quiz questions	Uses concern and wash-day answers to assign a route	Quiz questions and logic	Quiz-completion rate
Recommend	Views result page	Shows a simple routine, not a medical claim	Quiz results pages	Click to recommended product / routine
Capture	Chooses to receive recommendation by email	Records consent and concern preference	Quiz email field and consent copy	Consent rate
Educate	Opens welcome follow-up	Explains the cleanse-condition-finish routine	Welcome email; routine-step graphics	Meaningful click rate
Convert	Views Trial Kit or Bundle	Offers low-commitment or full-routine next step	Trial Kit page; Bundle page	Add-to-cart / checkout-start rate
Retain permission	Updates preferences or unsubscribes	Respects frequency and topic preferences	Preference-centre email	Preference completion; low unsubscribe rate

6. Workflow logic

Entry trigger

A visitor completes the Hair Routine Quiz.

Required data fields

- First name (optional)
- Email address (optional)
- Marketing consent status
- Primary hair concern
- Post-wash hair feel
- Wash frequency
- Stated routine need
- Recommended routine route
- Quiz completion date
- Last product-category click

Route assignment

- **Weak-looking / dull route:** recommend Strengthening Shampoo and Smooth & Repair Conditioner. If frizz is also selected, add Anti-Frizz Leave-in Serum.
- **Frizz / dryness route:** recommend Strengthening Shampoo, Smooth & Repair Conditioner and Anti-Frizz Leave-in Serum. Introduce Deep Repair Hair Mask as weekly care.
- **Undecided route:** show the Trial Kit as the lowest-commitment option and invite the person to explore the routine guide.

Email sequence

Step	Timing	Condition	Message / action	Main CTA	Exit / suppression rule
1	Immediately	Email submitted with valid consent	Deliver recommended routine and set expectations	View my routine	Stop promotional sequence after unsubscribed status
2	2 days	No purchase	Explain the 3-step wash-day routine	Learn the steps	Suppress if order placed
3	5 days	Clicked routine/product page but no purchase	Offer Trial Kit or recommended Bundle based on route	Try the 3-Step Kit / Shop my routine	Suppress if order placed
4	9 days	No purchase and remains subscribed	Practical guidance email; invite to quiz again or manage preferences	Find my routine	Stop after preference pause / unsubscribe

Suppression rules

- Never send marketing email without recorded consent.
- Stop the sequence when the customer unsubscribes or pauses marketing emails.
- Suppress a purchaser from first-purchase promotional messages after order confirmation.

- Do not make medical, clinical, hair-regrowth or guaranteed-result claims.

7. Content principles

- Lead with routine clarity, not a hard sell.
- Keep advice practical: cleanse, condition, finish and add weekly care only when relevant.
- Use customer-friendly concern language: frizz, dryness, dullness, rough-feeling lengths and weak-looking hair.
- State that results and experience can vary.
- Use one primary CTA in each email.

8. Assets this playbook produces

Playbook decision	Template output	Final Root & Rise asset
Quiz route and segment	Quiz Routing & Welcome Workflow Build Sheet	Hair Routine Quiz questions and results pages
First-email purpose and message	Welcome Email Copy Brief	Quiz-result / welcome email
Education need after sign-up	Email Copy Brief + asset checklist	Routine-step graphics and product image cards
Conversion offer by readiness	Journey workflow branch	3-Step Trial Kit page or Hair Fall Care Bundle page
Consent and frequency requirements	Preference and consent fields	Quiz consent copy and Preference-Centre Email

9. Measurement plan

Primary metric

Qualified routine-conversion rate: the percentage of quiz completers who purchase a Trial Kit or recommended routine within 14 days.

Supporting metrics

- Quiz-start and quiz-completion rates
- Email-consent rate
- Welcome-email click-through rate
- Product-page and Trial-Kit-page visits from the sequence
- Add-to-cart and checkout-start rates
- Unsubscribe, complaint and preference-pause rates

10. Test hypothesis

Hypothesis: For visitors uncertain about full-size products, a value-led Trial Kit CTA (“Try the 3-Step Kit”) will generate more qualified first-purchase conversions than a discount-led CTA.

Variable: Primary CTA and supporting module in Email 3.

Hold constant: Audience route, send timing, subject line approach and destination page.

Decision rule: Adopt the version that produces the higher completed-purchase rate after an adequate, pre-agreed sample period while maintaining acceptable unsubscribe rates.

11. Interview talking point

“I used the quiz as a segmentation mechanism, not only a lead-generation form. The playbook defines the customer problem, consent, data fields, route logic, content sequence, exclusions and measurement. The workflow template translates that into build-ready instructions, and the actual Root & Rise quiz, emails, Trial Kit page and Bundle page are the customer-facing outputs.”

12. Portfolio disclosure

Root & Rise is a fictional brand created for an independent marketing-automation portfolio. The workflow, audience logic, conversion assumptions and KPIs are illustrative and should be

validated against live data, final product information, consent requirements and platform capabilities before implementation.