

Root & Rise Playbook 02: Trial Kit Post-Purchase Education, Review and Repeat-Purchase Journey

Project status: Independent portfolio practice project

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

Journey: Trial Kit purchase → product-use education → experience check-in → review request → full-size routine recommendation

Version: 1.0

1. Purpose

Help first-time Trial Kit buyers use the cleanse-condition-finish routine correctly, learn whether the routine fits their wash-day habits, and choose an appropriate next step. The journey avoids premature pressure to purchase, gathers useful feedback and introduces a full-size routine only after the buyer has had time to try the products.

This playbook leads directly to these Root & Rise assets:

- 3-Step Trial Kit landing page
- Routine guide card and routine-step graphics
- Strengthening Shampoo, Smooth & Repair Conditioner and Anti-Frizz Leave-in Serum product pages
- Founder / hair-routine guidance email
- Product image cards
- Review Collection Page and review-request landing copy
- Hair Fall Care Bundle page
- Deep Repair Hair Mask product page and weekly-care cross-sell block
- FAQ page and Preference-Centre Email

2. Business objective

Improve the first-use experience for Trial Kit purchasers, collect permissioned and moderated feedback, and encourage an informed move to a full-size routine or relevant weekly-care product.

3. Customer objective

“I have bought the Trial Kit. Show me how to use it in the right order, help me judge whether it fits my routine, and only then suggest what to buy next.”

4. Audience and segments

Segment	Identification logic	Primary need	Relevant next step
New Trial Kit buyer	Paid order contains 3-Step Trial Kit	Clear usage instructions	Routine guide and routine-step graphics
Engaged buyer	Opens or clicks education email	More practical guidance	Product pages, blog guide or FAQ
Low-engagement buyer	Does not open education email	A simple reminder without repeated pressure	One resend / concise routine reminder
Satisfied reviewer	Submits approved review	Recognition and relevant product follow-up	Thank-you and full-size suggestion
Full-routine ready buyer	Clicks Bundle or product pages	Reorder / upgrade decision	Hair Fall Care Bundle
Dryness-care interest	Clicks weekly-care content or reports dry/rough lengths	Weekly care information	Deep Repair Hair Mask page

5. Journey map

Stage	Customer action / status	Brand response	Asset required	Success signal
Purchase	Buys Trial Kit	Confirms order through transactional communication	Transactional order confirmation; Trial Kit page	Successful order
Prepare	Awaits delivery	Sets realistic expectations for use	Trial Kit landing-page “What happens next” copy	Email engagement
Onboard	Kit is likely delivered	Shows three product steps in the correct order	Routine guide card; routine-step graphics	Click to usage content
Educate	Uses kit on wash days	Gives practical routine guidance	Founder/routine guidance email; product pages; FAQ	Useful-content click rate
Check in	Has had time to try routine	Asks about routine fit, not medical outcomes	Experience-check-in email; Review Collection Page	Feedback / review-start rate
Convert	Indicates readiness or clicks products	Offers full-size bundle or relevant product	Hair Fall Care Bundle; individual product pages	Repeat purchase rate

Retain	Wants fewer messages or different content	Provides self-service preference controls	Preference-Centre Email	Preference update / low opt-out rate
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6. Workflow logic

Entry trigger

A customer completes a paid order containing the 3-Step Trial Kit.

Required data fields

- Customer ID and email address
- Order ID and purchase date
- Products purchased
- Order / fulfilment status
- Delivery-confirmed date, where available
- Marketing consent status
- Quiz concern / recommended route, if available
- Education-email engagement
- Review submitted status
- Product-category clicks
- Purchase / reorder status
- Email preference and unsubscribe status

Operational principles

- Transactional order and delivery updates are separate from marketing messages.

- Send marketing follow-up only where a valid consent basis exists.
- Base post-purchase timing on confirmed delivery where possible; otherwise use a conservative estimated-delivery buffer.
- Do not request a review until the customer has had reasonable time to try the kit.

Email sequence

Step	Timing from delivery	Condition	Message / action	Main CTA	Exit / branch rule
1	1 day	Valid marketing consent	Welcome to the routine; explain cleanse-condition-finish order	Learn the steps	Stop if unsubscribed; suppress if order is cancelled/refunded
2	5 days	No full-size purchase	Practical guidance: shampoo, conditioner and serum amounts	See my routine	If weekly-care content clicked, tag weekly-care interest
3	12 days	No review submitted	Low-pressure experience check-in	Share my experience	Stop review asks after review completion

4	16 days	Clicked full-size product or bundle but no purchase	Recommend suitable full-size next step	Shop the full routine	Suppress after completed purchase
5	24 days	No full-size purchase; still subscribed	Helpful routine / FAQ email and preference option	Manage my preferences	End this sequence after message

Branches

- **Bundle-interest branch:** If customer clicks Hair Fall Care Bundle, send a full-routine follow-up that explains the three steps and links to the Bundle page.
- **Weekly-care branch:** If customer clicks Hair Mask content or reports dry/rough lengths in feedback, send the weekly-care explanation and link to Deep Repair Hair Mask.
- **Review-completed branch:** Send thank-you confirmation; do not continue review-request messages.
- **Support-needed branch:** If feedback indicates irritation, damaged item or a delivery issue, route to customer support and suppress promotional messages until resolved.

Suppression and safety rules

- Do not use customer reviews as proof of medical treatment, hair regrowth or guaranteed results.
- Moderate reviews before publication and use only genuine, permissioned feedback.
- Exclude unsubscribed contacts and people who have paused marketing.
- Exclude open support cases from promotional messages.

- Include working unsubscribe and preference controls in marketing emails.

7. Content principles

- Treat the Trial Kit as a learning and confidence-building product, not merely a discount tool.
- Demonstrate product roles clearly: cleanse, condition and finish.
- Keep language routine-first and realistic: hair can feel softer, smoother or easier to manage; individual experiences vary.
- Use a customer's stated concern or quiz route only where available and appropriately consented.
- Avoid sending a review request before a reasonable usage window.

8. Assets this playbook produces

Playbook decision	Template output	Final Root & Rise asset
Trial buyer's onboarding need	Post-Purchase Workflow Build Sheet	Trial Kit "What happens next" section; routine guide card
Correct product-use sequence	Post-Purchase Email Copy Brief	Routine-step graphics; product-use email
Engagement and next-product logic	Workflow branch fields	Product image cards; individual product pages; Bundle page
Feedback collection and moderation rules	Review Request Brief	Review Collection Page; review-request landing copy
Weekly-care relevance	Conditional content branch	Deep Repair Hair Mask product page and cross-sell block
Permission controls	Preference-field specification	Preference-Centre Email

9. Measurement plan

Primary metric

Trial-to-full-size conversion rate within a defined post-delivery window, such as 30 days.

Supporting metrics

- Delivered, open and meaningful-click rates for each education email
- Routine-guide engagement rate
- Review request click and completion rates
- Approved-review rate
- Full-size Bundle and individual-product add-to-cart rate
- Repeat-purchase rate
- Support-case rate, unsubscribe rate and preference-pause rate

10. Test hypothesis

Hypothesis: A post-delivery email focused on clear product-use guidance will create more full-size routine consideration than an email that introduces a purchase offer immediately.

Variable: Email 1 framing: education-led versus offer-led.

Primary outcome: Click-through to product education and completed full-size purchase within 30 days.

Guardrails: Unsubscribe rate, support contacts and refund/cancellation rate.

Decision rule: Use the treatment that improves the primary outcome without materially worsening the guardrails after a pre-defined sample period.

11. Interview talking point

“This journey shows that retention starts with successful first use. I did not jump from a Trial Kit purchase straight to a discount. I designed education, timing, review governance, customer-support suppression and product-interest branches. The playbook establishes the strategy; the

build sheet and copy brief make it executable; the Root & Rise routine guide, emails, review page and Bundle page are the visible assets.”

12. Portfolio disclosure

Root & Rise is a fictional brand created for an independent marketing-automation portfolio. All audience logic, timings, workflow branches, KPIs and test hypotheses are illustrative. Any production implementation must be validated using real customer research, consent records, fulfilment data, final product information, legal review and the selected marketing-automation platform.