

Root & Rise Template 02: Trial Kit Post-Purchase Workflow and Review Brief

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

Project status: Independent portfolio practice project

Purpose: Translate the Trial Kit post-purchase playbook into a build-ready lifecycle workflow, content brief and review-governance checklist.

1. Campaign brief

Field	Completed example
Campaign name	Root & Rise Trial Kit Post-Purchase Education and Review Journey
Business goal	Improve Trial Kit first use, collect useful feedback and encourage a relevant full-size purchase
Customer goal	Learn how to use the kit, assess routine fit and decide on a next step without pressure
Primary audience	Customers who purchase the 3-Step Trial Kit
Primary conversion	Full-size routine or relevant product purchase within 30 days of delivery
Secondary conversion	Permissioned review completion after a reasonable usage period
Main channels	Transactional email, lifecycle email, website product/review pages
Primary metric	Trial-to-full-size conversion rate
Guardrail metrics	Unsubscribe rate, complaint/support rate, refund/cancellation rate
Owner roles	CRM / Ecommerce / Content / Customer Support / Reviews moderator / QA
Required approvals	Product, legal/claims, consent, customer-service and review-moderation process

2. Data dictionary

Field / event	Definition	Source	Used for	Governance note
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order_completed	Paid ecommerce order completed	Ecommerce platform	Initial purchase identification	Use for operational order status
purchased_product	SKU/product title in completed order	Ecommerce platform	Entry condition	Confirm trial-kit SKU mapping
delivery_confirmed	Courier confirms delivery, where available	Shipping integration	Timing lifecycle messages	Prefer over assumed delivery date
estimated_delivery_date	Calculated delivery estimate	Ecommerce/shipping	Backup timing input	Use conservative delay if delivery event unavailable
marketing_consent	Permission to receive marketing email	CRM / checkout / preference centre	Marketing eligibility	Preserve consent source and timestamp
order_status	Paid, fulfilled, cancelled, refunded	Ecommerce platform	Suppression / routing	Do not promote to unresolved cases
support_case_open	Customer service case in progress	Helpdesk	Suppression	Avoid promotional sends until resolved
quiz_route	Previous stated quiz recommendation, if available	CRM	Optional relevance	Use only where consent and purpose allow
email_engagement	Opens/clicks by message	ESP	Engagement branch	Do not use opens as sole evidence of customer intent
weekly_care_interest	Click or declared interest in Hair Mask / dry lengths content	ESP/site	Weekly-care branch	Keep logic transparent and limited
review_submitted	Customer submits review	Review platform/form	Stop review requests	Requires moderation workflow
review_approved	Moderated review approved	Review platform	Review publishing / thank-you	Only genuine, permissioned content
repeat_purchase	Any subsequent paid order	Ecommerce platform	Conversion exit	Stop upgrade messages as appropriate

unsubscribe_status	Marketing opt-out	ESP / CRM	Global suppression	Apply immediately
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3. Entry, eligibility and suppression rules

Rule type	Rule
Entry	Order completed contains the Root & Rise 3-Step Trial Kit SKU
Marketing eligibility	Contact has valid recorded consent for marketing email
Timing preference	Trigger post-purchase marketing from confirmed delivery date; use an estimated-delivery buffer only when necessary
Global suppression	Unsubscribed, paused marketing preference, invalid email, or no marketing consent
Order suppression	Cancelled, refunded or chargeback order
Support suppression	Active delivery, product-quality, safety or customer-service case
Purchase exit	Full-size routine or other repeat purchase; move to relevant buyer lifecycle segment
Review exit	Review submitted; no additional review requests in the same campaign window

4. Workflow build sheet

Step ID	Trigger / eligibility	Delay	Action	Content asset / copy block	CTA / destination	Branch rule	Exit / suppression	Owner	QA checks
P01	Trial Kit order completed	Immediate	Send transactional order confirmation	Final transactional confirmation copy to be created	View order	—	Not a marketing email	Ecommerce	Order ID, order contents, support details

P02	Delivery confirmed + valid consent	1 day	Send routine onboarding email	Routine-step graphics; product-use instructions	LEARN THE STEPS	—	Stop if unsubscribed / support case	CRM / Content	Delivery timing; mobile rendering
P03	P02 delivered; no repeat purchase	4 days	Send practical use guidance	Founder / hair-routine guidance email; FAQ links	SEE MY ROUTINE	Record click category	Exit if repeat purchase	CRM / Content	Claims, product names, links
P04	No review submitted; no support case	7 days	Send experience check-in / review request	Review Request Brief, Section 5	SHARE MY EXPERIENCE	If feedback says issue, route support	Stop review asks after submission	CRM / Reviews	Review link; moderation notice
P05	Clicked Bundle/product page; no purchase	4 days	Send full-size recommendation	Product image cards; Hair Fall Care Bundle copy	SHOP THE FULL ROUTINE	If weekly-care interest, replace/add Mask module	Exit on purchase	CRM / Content	Correct product branch and UTM
P06	Weekly-care interest; no purchase	2 days after interest	Send weekly-care educational message	Deep Repair Hair Mask product copy; weekly-care routine step	ADD WEEKLY CARE	—	Exit on purchase / unsubscribe	CRM / Content	Avoid overclaiming; destination check

P07	No repeat purchase; subscribed	8 days after P05/P06	Send FAQ and preference option	FAQ page; Preference -Centre Email	MANAGE MY PREFERENCES	—	End campaign after send	CRM / Content	Preference link works
X01	Repeat purchase at any time	Immediate	Exit trial conversion journey; update lifecycle status	—	—	Start relevant buyer / retention workflow if applicable	Purchase exit	CRM	No duplicate sends
X02	Support case opens	Immediate	Pause promotional messages	Customer-support communication	Contact support	Resume only per approved policy	Support suppression	CRM / Support	Case integration / manual workflow
X03	Unsubscribe or pause preference	Immediate	Stop marketing sends	Preference centre	—	—	Global suppression	CRM	Suppression proof

5. Review Request Brief

Field	Completed example
Review campaign name	Trial Kit Experience Check-In
Audience	Trial Kit purchasers with valid marketing consent, no active support case and no existing review submission
Recommended timing	Approximately 12 days after confirmed delivery, adjusted to actual product-use context
Customer-friendly purpose	Help another shopper understand routine fit, texture, ease of use and manageability
Do not ask for	Medical, treatment, hair-regrowth, cure or guaranteed-result claims
Subject-line option A	How did your Root & Rise routine fit your wash day?
Subject-line option B	A two-minute check-in on your Trial Kit

Preheader	Your honest routine feedback can help another shopper choose a next step.
Main message	You have had time to try the three steps. Tell us what you used, what felt useful and what you would like to see next.
Primary CTA	SHARE MY EXPERIENCE
Destination	Review Collection Page
Review form fields	Product used; usage duration; primary concern; review title; experience; star rating; recommendation; optional initials; optional photo
Customer prompt	Focus on ease of use, scent, texture, routine fit and manageability. Avoid medical or treatment claims.
Moderation statement	Reviews are checked before they appear to keep the community useful and respectful.
Review exit	Mark review_submitted = true and remove contact from review-request sends
Issue escalation	If response reports irritation, damage, incorrect item or delivery issue, create/rout to support case and pause promotion

6. Content-production brief: onboarding email

Field	Completed example
Email name	Trial Kit: Your 3-step wash-day guide
Audience	Delivered Trial Kit buyers with marketing consent
Trigger	One day after delivery confirmation
Customer context	They have bought a low-commitment kit and may not yet know the intended order or amount to use
Main message	A routine is easier to evaluate when the steps are clear: cleanse, condition and finish
Content blocks	Header; short reassurance; Step 1 Shampoo; Step 2 Conditioner; Step 3 Serum; FAQ link; single CTA
Supporting assets	Routine-Step Graphics; product image cards; product-page use instructions
Subject-line option A	Your 3-step Root & Rise wash-day guide
Subject-line option B	Start your Trial Kit with these three clear steps
Preheader	Cleanse, condition and finish—without overcomplicating your routine.
Primary CTA	LEARN THE STEPS
Destination	Routine-guide content or Trial Kit page section with UTM parameters
Mandatory reassurance	Results and experience can vary. Follow directions on pack. Cosmetics are for external use only.

Exclusions	Active support case, cancelled/refunded order, unsubscribed or no marketing consent
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7. Asset handoff checklist

Asset	Required elements	Direct source in Root & Rise asset pack	Status
Trial Kit landing page	Kit contents, audience, what happens next, CTA	Trial-Kit Landing Page	Ready as portfolio copy
Routine guide	Cleanse-condition-finish order and use instructions	Routine-Step Graphics; individual product pages	Ready as portfolio copy
Onboarding email	Briefed education message	This template, Section 6	To produce in email platform/mockup
Founder/routine guidance	Simpler routine philosophy and quiz CTA	Founder or Hair-Expert Message Template	Ready as portfolio copy
Product education	Shampoo, conditioner and serum benefits and CTAs	Product Image Cards	Ready as portfolio copy
Review request	Customer-friendly check-in and moderated review CTA	Review Collection Page and review request landing copy	Ready as portfolio copy
Full-size conversion page	Three-step Bundle proposition and Trial Kit reassurance	Hair Fall Care Bundle page	Ready as portfolio copy
Weekly-care branch	Mask role and once-a-week direction	Deep Repair Hair Mask page	Ready as portfolio copy
Help and preferences	Customer questions and frequency controls	FAQ Page; Preference-Centre Email	Ready as portfolio copy

8. Measurement dashboard fields

Metric	Formula / definition	Review cadence	Diagnostic use
Trial-to-full-size conversion	Full-size purchasers ÷ eligible Trial Kit buyers	Weekly / monthly	Core journey outcome
Routine-guide engagement	Unique CTA clickers ÷ delivered onboarding emails	Per send	Indicates education relevance

Review completion rate	Submitted reviews ÷ eligible review-request recipients	Per campaign	Evaluates feedback invitation
Bundle consideration rate	Bundle-page visitors or add-to-cart users ÷ eligible buyers	Weekly	Indicates upgrade interest
Weekly-care interest rate	Hair Mask clicks ÷ eligible buyers	Weekly	Identifies content/product relevance
Unsubscribe rate	Unsubscribes ÷ delivered marketing emails	Per send	Fatigue / relevance guardrail
Support-case rate	Support cases ÷ Trial Kit orders	Weekly	Experience and operational guardrail

9. Test planner

Field	Completed example
Test name	Education-first versus offer-first Trial Kit onboarding
Hypothesis	Product-use education immediately after delivery will create greater full-size consideration than an immediate purchase offer
Audience	Eligible delivered Trial Kit purchasers with valid marketing consent
Variant A	Clear routine-use guide with no price incentive
Variant B	Full-size routine offer introduced in first marketing message
Variable	First post-delivery message framing
Hold constant	Audience eligibility, send timing, subject-line approach, footer and measurement window
Primary success metric	Full-size purchase within 30 days of delivery
Secondary metrics	Product education clicks, Bundle add-to-cart, review completion
Guardrails	Unsubscribe, complaint/support-case, refund/cancellation rates
Decision rule	Select the variant with better primary outcome and no material deterioration in guardrails after an adequate pre-defined sample period

10. QA and launch checklist

- Verify Trial Kit SKU and paid-order event correctly enter the workflow.

- Confirm delivery event or conservative delivery-delay calculation.
- Confirm transactional and marketing communications are separated.
- Confirm valid consent is required before lifecycle emails are sent.
- Test repeat-purchase, cancellation/refund, support-case, review-submission and unsubscribe exits.
- Confirm review form has clear moderation and safe-feedback guidance.
- Confirm every product, CTA, FAQ, preference and support link is correct.
- Confirm communications avoid medical claims, hair-regrowth claims and guaranteed outcomes.
- Validate UTM tags and reporting fields.

11. Portfolio annotation

This template demonstrates how the post-purchase playbook becomes an operating document. It shows lifecycle timing, order and delivery dependencies, consent rules, customer-support safeguards, review governance, conditional product education, testing and measurable outcomes. Its corresponding customer-facing assets are the Trial Kit page, routine-step graphics, product pages, review page, Bundle page, FAQ and preference email.

12. Portfolio disclosure

Root & Rise is a fictional brand and this completed template is an illustrative practice artefact. A real implementation must be reviewed against actual ecommerce events, delivery data, consent records, local consumer and privacy requirements, final product claims, customer-service policy and the capabilities of the selected CRM/marketing-automation platform.