Reelo Assignment — Intern: Product & Data Analyst

Candidate: Aayush Raj Giri
Brand Scenario: PizzaHub (45 outlets) saw a 28% drop in repeat customer orders over the last 2 months.

Part 1 — AI Prompt Engineering

Step 1: Exploration Summary

I explored the Reelo app: Dashboard, Campaigns, Customer Insights (Overview, Segmentation, Customer List, Activity), Loyalty, and related CTAs like Import/Export. The free trial exposes exports for Customer List (CSV). Activity export requires the Growth plan.

Step 2: Where to find & export data

Data Type	Where in Reelo	How to export / notes
Customer data (new vs repeat, activities & transactions)	Customer Insights → Overview (counts), Segmentation (RFM), Customer List (CSV), Activity	Customer List CSV: columns: name, email, phone, gender, birthday, anniversary, address, last_visited_at (UTC), rfm_segment, total_spent, avg_spend, total_visits, points_balance, redemptions, customer_tags, average_tbo_in_days.
Sales & order data (store-wise orders)	Dashboard → Your business at a glance	Visible KPIs: Total Sales, Total Orders, Total Customers, Repeat Customers, Rewards Redeemed. Export not available on free trial.
Campaign / engagement data	Campaigns → Campaign Performance	Metrics shown: Campaigns sent, Revenue, Avg visit rate, Total messages sent, Delivered, Failed, Visits. Export not available on free trial.
Loyalty program data	Loyalty → Activate Loyalty (Cashback / Amount Spent / Visit Made) + Customer List fields	Program definition visible in UI. Per-customer points_balance, redemptions, average_tbo_in_days exported via Customer List CSV. Ongoing

Step 3: Complete AI prompt to analyze the problem

This prompt is designed for Claude/ChatGPT. Paste it and attach the listed CSV files.

```
You are a senior product + data analyst. A QSR brand "PizzaHub" (45 outlets) saw a 28%
drop in repeat customer orders in the last 2 months despite regular campaigns. Diagnose
drivers and recommend actions.

DATA I WILL PROVIDE (all CSV):
1) customers.csv (exported from Reelo → Customer Insights → Customer List)
   Columns: customer_id (derived if absent), name, email, phone, gender, birthday,
anniversary, address,
            last_visited_at (UTC), rfm_segment, total_spent, avg_spend, total_visits,
            points_balance, redemptions, customer_tags, average_tbo_in_days.
2) sales_kpis.csv (from Dashboard or POS export)
   Columns: date, store_id, store_name, total_orders, repeat_orders, total_sales,
rewards_redeemed.
3) campaign_perf.csv (from Campaigns → Campaign Performance)
   Columns: date, campaign_id, campaign_name, channel (sms/whatsapp/email),
audience_segment,
            messages_sent, delivered, failed, visits, revenue, avg_visit_rate.
4) loyalty_config.csv (from Loyalty settings)
   Columns: program_type (cashback/amount_spent/visit_made), earn_rule, redeem_rule,
min_points_to_redeem,
            points_expiry_days, issuance_multiplier.

WHAT TO ANALYZE
A. Trend & composition
- Trend of repeat_orders and repeat rate by week and by store. Compare last 8 weeks vs
prior 8 weeks.
- Shift in customer mix: new vs repeat, and RFM segment transitions (e.g., loyal →
at_risk → lost).
- Time between orders (TBO): median/95th percentile by segment; identify where it
stretched.
B. Campaign effectiveness
- For each campaign: delivery rate, visits lift (vs baseline), revenue per message, repeat
```

```
conversion rate.
- Did "at_risk/about_to_sleep" audiences receive targeted campaigns? Measure lift vs
control if available; otherwise pre/post.
C. Loyalty program
- Points accrual vs redemption rate by segment; proportion with high points_balance but no
recent visits ("breakage risk").
- Any changes to earn/redeem rules correlating with the drop (e.g., higher threshold,
expiry).
D. Store/store cluster effects
- Which stores contributed most to the decline? Control for footfall by new customers and
local factors.
E. Hypotheses to validate
- Campaigns under-delivered (e.g., WhatsApp undelivered) → low visit rate.
- Points redemption friction or expiry → disengagement.
- Price/menu changes (proxy via avg_spend shift) → reduced repeat.
- Data capture issues (drop in valid numbers) → campaign reach fell.

OUTPUT REQUIRED
1) Executive summary (≤10 bullets): key drivers of the 28% drop.
2) 3–5 most actionable recommendations with estimated impact and the data signals that
support them.
3) Tables:
   - Weekly repeat rate by store cluster (top 10 deltas)
   - Segment transition matrix (Loyal → At Risk → Lost etc.)
   - Campaign ROI table (messages_sent, delivery%, visits, revenue/message)
4) Visuals to describe (titles + what they'd show): trend lines, bar charts, and a Sankey
for segment transitions.
5) Data quality notes: missing columns, date gaps, outliers.
6) Next data to pull if needed (e.g., raw transaction log, item-level basket, store
hours).

ASSUMPTIONS
- If repeat_orders is absent, infer repeat via total_visits>1 or by comparing
last_visited_at and visit counts.
- Treat phone as primary identifier if customer_id is missing; deduplicate by phone/email.
- Use UTC; convert if timestamps include timezone.
```

Step 4: One concrete example

If I export **customers.csv** from Reelo → Customer Insights → Customer List → Export and feed it with the above prompt, I expect the model to surface that customers labeled *At Risk* / *About to sleep* have a much higher *average_tbo_in_days* and low *redemptions* despite sizable *points_balance*. The business value: run a WhatsApp win■back targeting those segments with an easy redemption offer and a short■expiry bonus, which should lift repeat orders in the next 2–3 weeks.

Part 2 — Product Analytics Instrumentation

Step 1: What the 'Customer Insights' page shows

• Tabs: Overview, Segmentation (RFM grid: VIP, Loyal, Promising, New, Needs Attention, At Risk, Lost, About to sleep, Potential Loyalist, Can't Lose), Customer List, Activity.
• Overview: snapshot cards for Total Customers, New in period, Repeat in period; time-range selector (e.g., Last 12 months).
• Segmentation: clickable segment cards with counts and percentages.
• Customer List: Quick Glance cards (Total, Purchased, Imported, Potential, Blocked); search box; Import, Export (CSV), Filter, time range (e.g., Lifetime).
• Activity: search by customer, channel filter (All), date range (e.g., Last 30 Days), and an 'Export Data' button (gated to Growth plan).

Actions users can take

• Switch tabs, change date range, apply filters, and search customers.
• Click a segment card to drill into a customer cohort.
• Import customers; Export the Customer List as CSV.
• Attempt Activity export (upsell surfaced on free plan).

Filters / options observed

• Date range selectors on Overview/Activity (e.g., Last 30 Days, Last 12 Months).
• Scope: Lifetime vs period on Customer List.
• Channel dropdown on Activity, customer search/autocomplete.

Step 2: Event tracking plan for Amplitude

Success Metrics
• Primary #1: Weekly Active Brands using Customer Insights (viewing any Insights tab) / total brands.
• Primary #2: Export Utilization — % of active brands exporting Customer List at least once per week.
• Primary #3: Segment-to-Action Rate — % of sessions where a user clicks a segment and then exports or navigates to campaigns.
• North Star: *Insight-Activated Sessions per Brand per Week* = sessions with at least one meaningful action (export, filter, segment click, or navigate to campaign) divided by active brands.

Event Schema (object_action) — 10 core events

Event name	When it fires	Why track	Key properties
customer_insights_viewed	User lands on any Insights tab	Adoption & entry point volume	brand_id, user_id, user_role, tab (ove
customer_insights_tab_changed	Tab switch occurs	Discoverability of tabs	brand_id, from_tab, to_tab
segment_card_clicked	User clicks an RFM segment	Interest in cohorts; starting point for actions	brand_id, segment_name, segment_s
insight_info_opened	User opens an info tooltip (i)	Education needs; content usefulness	brand_id, tab, info_key
customer_search_performed	Search executed in Customer List/Activity	Findability	brand_id, tab, query_length, has_resu
filter_applied	Any filter or 'Lifetime' scope set	Power usage; which filters matter	brand_id, tab, filter_key, filter_value, c
date_range_changed	Date selector changed	Temporal analysis habits	brand_id, tab, previous_range, new_r
customer_list_exported	CSV export succeeds	Core outcome; data activation	brand_id, rows_exported, export_form
activity_export_clicked	User clicks 'Export Data' on Activity	Measure upsell & friction	brand_id, plan_tier, upsell_shown (bo
navigate_to_campaigns	User clicks through to Campaigns from Insights	Insight→Action linkage	brand_id, source_tab, segment_name

Step 3: Amplitude dashboards

Adoption & Engagement

Purpose: Purpose: understand who uses Insights and how often.
Chart types: Segmentation line chart: DAU/WAU of customer_insights_viewed by plan_tier and user_role.; Funnel: customer_insights_viewed → segment_card_clicked → filter_applied → customer_list_exported.; Retention: N■week retention on users who viewed Insights (return to any Insights tab).
Events: customer_insights_viewed, segment_card_clicked, filter_applied, customer_list_exported
What it reveals: Reveals which plans/roles drive adoption, drop-offs in the funnel, and stickiness of the feature.

Insight → Action

Purpose: Purpose: measure whether Insights lead to action.
Chart types: Event flow chart: segment_card_clicked → navigate_to_campaigns or customer_list_exported.; Segmentation bar: Segment-to-Action Rate by RFM segment and date range.; Time to action: median minutes from first view to export/navigation.
Events: segment_card_clicked, navigate_to_campaigns, customer_list_exported
What it reveals: Shows which segments trigger downstream actions and where to improve CTAs.

Exports & Upsell

Purpose: Purpose: reliability of exports and Growth-plan upsell for Activity export.
Chart types: Timeseries: count of customer_list_exported; rows_exported distribution.; Conversion: activity_export_clicked with upsell_shown → upgrade clicks (if tracked elsewhere).; Breakdown: exports by date_range selection (e.g., Lifetime vs Last 30 Days).
Events: customer_list_exported, activity_export_clicked
What it reveals: Identifies export demand, friction, and upgrade opportunities.

Step 4: Naming conventions

• Event names follow **[object]_[action]**, snake_case, present tense (e.g., customer_list_exported).
• Properties use snake_case; IDs end with _id; booleans prefixed with is_/has_; enums use lowercase strings (e.g., plan_tier: free/growth).
• Timestamps in UTC ISO-8601; numeric currencies in smallest unit (e.g., paise) with currency_code field if multi■currency.
• Consistent segment_name values restricted to the RFM vocabulary shown in-product; use null for unknown.
• Avoid spaces/punctuation in names to keep querying simple across Amplitude/SQL and to ease downstream joins.

Submission checklist
✓ Export customers.csv from Customer Insights → Customer List.
✓ Pull KPIs from Dashboard and campaign metrics from Campaign Performance (create CSVs if export is unavailable).
✓ Paste the provided AI prompt; attach the CSVs.
✓ Review AI output; convert top 3–5 recommendations into win■back campaigns via Campaigns or WhatsApp Chat.
✓ Track usage with the proposed Amplitude events & dashboards.