Reelo — Product & Data Analyst Assignment

Candidate: Aayush Raj Giri

Part 1 — AI Prompt Engineering

Step - 1: Quick Product Tour (What I Checked)

I explored the key sections of the platform to understand its features and functionality:

- **Dashboard:**
  The main dashboard provides a quick overview of the business with sections for sales and orders. It includes a "Your business at a glance" summary, options to select time ranges, a "View report" button, and the ability to schedule email reports for regular updates.

- **Campaigns:**
  This section contains a Template Library for creating campaigns quickly. The Campaign Performance tab shows important metrics like campaigns sent, revenue generated, average visit rate, and total visits.

- **Customer Insights:**
  Under Customer Insights, I found an Overview section, Segmentation tools to group customers, and a Customer List that can be exported as a CSV file. There's also an Activity section, though exporting activity data is only available on the Growth plan.

- **Loyalty:**
  The Loyalty section offers different program types such as Cashback, Amount Spent, and Visit Made. Program rules can be customized, and customer balances and redemptions are visible in the Customer List export.

Step - 2: Where You Can Find and Export the Following Data Types

Customer Data (New vs. Repeat), Activities, and Transactions

Where to Find:

The platform provides several ways to access customer data:

- **Customer Insights → Overview:** This section displays the total number of customers, along with new customers and repeat customers for the selected time period.

- **Customer Insights → Segmentation:** Offers detailed customer segmentation using RFM analysis (Recency, Frequency, Monetary). This includes categories like VIP customers, Loyal customers, At Risk customers, and more.

- **Customer Insights → Customer List:** Allows you to export detailed customer-level data in CSV format for further analysis.

- **Customer Insights → Activity:** Shows customer activity information including last visit date, total number of visits, and redemptions made.

How to Export:

- **Customer Insights → Customer List → Export:** You can export data as a CSV file, which includes important columns such as name, email, phone, gender, birthday, anniversary, address, last visited date, RFM segment, total amount spent, average spend, total visits, points balance, redemptions, customer tags, and average time between orders in days.

- **Activity Export:** More detailed customer activity data can be exported, but this feature is only available on the Growth plan.

Sales and Order Data (Store-wise and for Brand)

Where to Find:

- **Dashboard → Your Business at a Glance:** Provides a summary of total sales, total orders, total customers, and rewards redeemed.

- **Dashboard → Sales in the Last 30 Days:** Shows sales and order data broken down by store as well as brand-wide performance.

How to Export:

- **Sales Data Export:** Direct export is not available in the free plan. However, you can receive email reports from the Dashboard section. For more comprehensive transaction-level data, integration with your Point of Sale (POS) system is required.

Campaign/Engagement Data

Where to Find:

- **Campaigns → Campaign Performance:** Displays key metrics including the number of campaigns sent, revenue generated from campaigns, average visit rate, and total visits during the selected period.

How to Export:

- Export options are limited in the free plan. You can manually record campaign performance data such as campaign names, number of messages sent, visits generated, and revenue earned by capturing the information displayed on screen.

Loyalty Program Data

Where to Find:

- **Loyalty → Activate Loyalty:** This section allows you to set up and configure different types of loyalty programs, including Cashback, Amount Spent, and Visit Made programs.

How to Export:

- **Customer List Export:** Loyalty-related information such as points balance and redemptions can be found in the Customer List CSV export.

- **Loyalty Settings:** Detailed program rules and configurations can be accessed from the Loyalty Settings section, though these may need to be documented manually.

Step - 3: Write a Complete AI Prompt for Claude/ChatGPT

Business Problem:

PizzaHub is a quick-service restaurant chain operating 45 outlets. Over the past two months, the company has experienced a concerning 28% drop in repeat customer orders, even though they have been running regular marketing campaigns. The management needs to understand what is causing this decline and identify practical steps to reverse the trend. The analysis should focus on repeat customer behavior, how effective the campaigns have been, sales patterns, and how well the loyalty program is performing.

Data Files to Provide:

1. Customer List CSV (exported from Customer Insights → Customer List → Export)

This file contains detailed customer information with the following columns: name, email, phone, gender, birthday, anniversary, address, last visited date, RFM segment, total amount spent, average spend per visit, total number of visits, loyalty points balance, redemptions made, customer tags, and average time between orders in days.

2. Sales and Order Data CSV (exported from Dashboard → Your Business at a Glance and Sales in the Last 30 Days)

This file includes transactional data with columns such as: date, store ID, store name, total orders, repeat orders, total sales, and rewards redeemed.

3. Campaign Performance Data CSV (exported from Campaigns → Campaign Performance)

This file tracks marketing campaign results and includes: date, campaign ID, campaign name, communication channel (SMS/WhatsApp/Email), audience segment targeted, number of messages sent, messages delivered, failed deliveries, visits generated, revenue earned, and average visit rate.

4. Loyalty Program Data CSV (exported from Loyalty → Activate Loyalty and Customer Insights → Customer List)

This file contains loyalty program metrics including: points balance, redemptions, earning rules, redemption rules, minimum points required to redeem, and points expiry period in days.

Analytical Questions:

1. Why has the percentage of repeat customer orders dropped in the last 2 months?

Analyze the sales and order trends over time to pinpoint exactly when the decline began and identify any patterns or events that coincide with the drop.

2. Which customer segments have shown the most significant decline in repeat orders?

Using the RFM segmentation data (which categorizes customers by Recency, Frequency, and Monetary value into groups like VIP, Loyal, At Risk, etc.), identify which segments have been most affected.

3. How do loyalty program behaviors correlate with repeat purchase behavior?

Examine whether customers who have accumulated high points balances but haven't redeemed them are becoming disengaged. Look for patterns between loyalty participation and repeat orders.

4. What impact have the marketing campaigns had on repeat customer orders?

Review campaign performance data including campaigns sent, revenue generated, and average visit rates to determine if specific campaigns led to increases or decreases in repeat orders.

5. Do sales or order volumes correlate with the drop in repeat customer orders?

Investigate whether there have been significant changes in store-level or brand-wide sales and how these changes relate to the decline in repeat purchases.

6. What is the average time between orders for different customer segments?

Use the average time between orders and total visits data to understand purchasing frequency patterns across different customer segments, particularly comparing loyal customers with those at risk of churning.

Actionable Recommendations:

Based on the findings from the analysis, please provide:

- Specific marketing strategies to boost repeat customer orders, such as targeted campaigns designed for at-risk customer segments or adjustments to the loyalty program structure.

- Suggestions for improving the loyalty program, such as making it easier to redeem points, changing the rewards structure, or introducing time-sensitive

offers.

- Identification of customer segments that should be targeted with special promotions or loyalty incentives to bring them back and increase their engagement.

Output Format:

1. Executive Summary:

Provide a concise list of 5 to 7 key insights that summarize the main reasons behind the drop in repeat orders, along with clear, actionable recommendations.

2. Data Visualizations:

Include charts and graphs that illustrate important trends, such as:

- How repeat orders have declined over the past two months
- Sales and order volumes broken down by individual stores
- Visual comparisons of customer segments (loyal vs. at-risk customers)

3. Tables:

Present data in organized tables showing:

- How customers have moved between segments (for example, from Loyal to At Risk to Lost)
- Campaign performance metrics compared with repeat customer order rates
- Analysis of loyalty program usage, including points balances and redemption patterns

4. Actionable Insights:

Provide a bullet-point list of specific, implementable recommendations based on the analysis. For example: "Launch a targeted campaign for At Risk customers offering a special incentive to redeem their accumulated points within the next 7 days to re-engage them before they churn.

Step 4: One Concrete Example

Example Scenario:

Let me walk you through a practical example of how this analysis would work in real life.

Suppose I export the Customer List CSV file from the platform by going to Customer Insights → Customer List → Export. I then upload this file to Claude along with the detailed prompt I created earlier.

What I Would Expect to Discover:

Through the analysis, I would likely find that customers who fall into the "At Risk" and "About to Sleep" segments show some concerning patterns. Specifically, these customers have a noticeably higher average time between orders (as shown in the `average_tbo_in_days` column), and they're making very few redemptions despite having accumulated substantial loyalty points balances.

Why This Insight Would Be Valuable:

This finding would be extremely helpful because it clearly shows that these customer segments are becoming disengaged from the loyalty program. They've earned points but aren't using them, and they're visiting less frequently. This is a warning sign that they might stop ordering altogether.

How We Could Take Action:

Armed with this insight, we could create a targeted intervention. For example, we could launch a special campaign specifically for these "At Risk" and "About to Sleep" customers, offering them an attractive incentive: "Redeem your accumulated points within the next 7 days and receive an additional bonus discount on your order."

This type of time-sensitive, personalized offer would accomplish two important goals. First, it would motivate these disengaged customers to return and make a purchase, helping to boost our repeat order numbers. Second, it would demonstrate the value of the loyalty program and potentially prevent these customers from churning completely. By re-engaging them now while they're still reachable, we have a much better chance of turning them back into regular, loyal customers.

Part 2: Product Analytics Instrumentation

Step 1: Navigate to Reelo's "Customer Insights" Page and Document

1. What Metrics/Insights Are Shown?

The Customer Insights page provides a comprehensive overview of customer behavior and engagement through several key sections:

Overview:

The Overview section displays critical metrics that give you a snapshot of your customer base:

- **Total Customers:** Shows the complete count of all customers within the selected time period.

- **New Customers in Selected Period:** Tracks how many new customers have been acquired during the chosen timeframe, helping you measure customer acquisition success.

- **Repeat Customers in Selected Period:** Displays the number of existing customers who have made additional purchases within the selected period, which is essential for understanding retention.

- **Customers by Day:** This metric breaks down customer purchase behavior by day of the week, revealing whether customers tend to visit primarily on weekdays, weekends, or throughout the week. This insight helps optimize staffing and promotions.

- **Average Spend by Repeat Customers:** Shows the average amount repeat customers spend per order. This is particularly useful for identifying whether repeat customers are spending less over time, which could signal engagement issues.

Segmentation:

This section uses RFM analysis to categorize your customers into actionable groups:

- **RFM Segments:** The platform automatically segments customers based on three key factors - Recency (how recently they purchased), Frequency (how often they purchase), and Monetary value (how much they spend). These segments include: VIP, Loyal, Promising, New, Needs Attention, At Risk, Lost,

Potential Loyalist, Can't Lose, and About to Sleep.

- **Pro-tip Information:** For each segment, the platform provides helpful suggestions for action. For example, for Loyal customers, it might recommend: "Offer them related products to upsell or cross-sell," giving you practical ideas for engaging each customer group.

Customer List:

This detailed table provides individual customer records with important data points including their RFM segment classification, last visit date, total amount spent, total number of visits, loyalty points balance, redemptions made, and any custom tags applied to the customer.

Activity:

The Activity section tracks specific customer actions and engagement:

- **Activity Data:** Displays various customer activities including purchases, QR bonus redemptions, and referral bonuses earned.

- **Last Visit Date:** Shows when each customer most recently interacted with your business.

- **Total Visits:** Tracks the cumulative number of visits each customer has made over time.

- **Redemptions:** Monitors how many times customers have redeemed their loyalty rewards, indicating their engagement with your loyalty program.

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2. What Actions Can Users Take?

The Customer Insights page offers multiple interactive features that enable users to take meaningful actions:

- **Switch Between Tabs:** Users can easily navigate between Overview, Segmentation, Customer List, and Activity tabs to examine customer data from different angles and gain comprehensive insights.

- **Drill Into Segments:** By clicking on any RFM segment card, users can view a detailed breakdown of all customers within that specific segment, allowing for focused analysis of particular customer groups.

- **Send Campaign:** For certain segments like Loyal customers, users can directly click a "Send Campaign" button to launch targeted marketing campaigns with personalized promotions or special offers designed for that specific group.

- **Export Data:** The Customer List data can be exported as a CSV file, enabling users to perform additional analysis using external tools like Excel or import the data into other business systems.

- **Search for Customers:** A search function allows users to quickly locate specific customers by entering their name, email address, or phone number in both the Customer List and Activity tabs.

- **View Detailed Activity:** Users can drill down into comprehensive activity logs for individual customers, examining specific actions such as purchases made, QR bonus redemptions, and referral bonus activities.

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3. What Filters/Options Exist?

The platform provides extensive filtering capabilities to help users analyze their data more effectively:

Date Range Filters:

Users can select from predefined time periods including Today, Yesterday, Last 7 Days, Last 30 Days, This Month, Last Month, Last 6 Months, Last 12 Months, or create a Custom Range to analyze any specific timeframe they need.

Customer Segmentation Filters:

The platform allows filtering by specific customer segments such as New Customers, VIP Customers, Loyal Customers, At Risk Customers, Promising Customers, Potential Loyalists, Can't Lose Customers, Lost Customers, Need Attention, and About to Sleep Customers. This makes it easy to focus on particular groups that require attention or represent opportunities.

Activity Type Filters:

In the Activity tab, users can filter customer data by specific types of activities including All Activity, Purchase, QR Bonus, and Referral Bonus. This helps focus analysis on particular customer actions and understand which activities are driving engagement.

Customer Visit Filters:

Users can segment customers based on visit recency, such as those who have visited in the Last 30 Days, Last 90 Days, or a Custom time range. Additionally, users can filter for customers who have not visited within a specified period, helping identify potentially churning customers.

Quick Filters:

- **Customer Segments:** Quick-select options allow users to instantly filter by segments like Loyal, Promising, or At Risk, making it fast and easy to focus analysis on specific customer groups without navigating through multiple menus.

- **Customer Search:** An integrated search bar enables users to find specific customers by typing their name, email, or phone number, providing quick access to individual customer records within the larger database.

Step 2: Design an Event Tracking Plan for Amplitude

Define Success Metrics:

To measure the effectiveness of the Customer Insights feature, we need to establish clear success metrics that tell us whether users are finding value in the product.

Primary Metrics:

- **% of Active Brands Using Customer Insights Weekly:** This metric tracks how many brands are actively engaging with the Customer Insights feature on a weekly basis. A higher percentage means more brands are finding the feature valuable enough to use it regularly.

- **Export Utilization Rate:** This measures what percentage of brands are exporting Customer List data at least once per week. It helps us understand whether users find the export functionality useful and whether they're taking data outside the platform for deeper analysis.

- **Segment-to-Action Rate:** This tracks how often users click on a customer segment and then take a meaningful action afterward, such as exporting data or navigating to create a campaign. It shows us whether the segment cards are effectively guiding users toward taking action on their insights.

North Star Metric:

- **Insight-Activated Sessions per Brand (Weekly):** This is our primary health indicator for the feature. It measures how frequently brands interact with Customer Insights (viewing data, applying filters, exporting information, etc.) and then perform actionable tasks like sending campaigns or exporting data. This metric directly connects user engagement with the actual value they're getting from the feature.

Event Schema:

Below is a detailed breakdown of the specific user actions we want to track and why they matter:

1) Event Name: page_view

When it fires: This event triggers whenever a user opens the Customer Insights page or switches between its different tabs (Overview, Segmentation, Customer List, or Activity).

Why we track it: We need to understand how often users are accessing Customer Insights and which sections they find most valuable. This helps us identify popular features and areas that might need improvement.

Key Properties:

- brand_id: Identifies which brand is using the feature
- user_role: Shows the role of the person viewing the page (e.g., Admin, Analyst)
- tab_name: Records which specific tab was accessed (e.g., Overview, Segmentation, Customer List, Activity)
- plan_tier: Indicates the subscription level (e.g., Free, Growth)
- device_type: Tracks whether the user is on Mobile or Desktop

2) Event Name: filter_applied

When it fires: This event is triggered whenever a user applies any filter in Customer Insights, such as selecting a customer segment or choosing a date range.

Why we track it: Filters help users narrow down their data to find specific insights. By tracking filter usage, we can understand which filters are most valuable and how users are segmenting their customer data.

Key Properties:

- brand_id: The brand applying the filter
- user_role: The user's role (e.g., Admin, Analyst)
- filter_type: The category of filter used (e.g., Date Range, Customer Segment)
- filter_value: The specific option selected (e.g., Last 30 Days, At Risk Customers)

3) Event Name: export_clicked

When it fires: This event fires when a user clicks the Export button to download Customer List data or Activity data as a CSV file.

Why we track it: Exporting data is a strong indicator that users find the information valuable enough to analyze further outside the platform. This metric helps us measure the success of our export functionality.

Key Properties:

- brand_id: Which brand is exporting data
- export_format: The file format being exported (e.g., CSV)
- export_source: Where the export originated from (e.g., Customer List, Activity)
- user_role: The role of the person performing the export

4) Event Name: segment_card_clicked

When it fires: This event triggers when a user clicks on any customer segment card (such as Loyal, At Risk, VIP, etc.) in the Segmentation tab to view detailed information about that segment.

Why we track it: This tells us which customer segments users care about most and are actively exploring. It helps us understand which segments drive the most interest and potential action.

Key Properties:

- brand_id: The brand exploring the segment
- segment_name: Which segment was clicked (e.g., Loyal, At Risk, VIP)
- user_role: The user's role (e.g., Admin, Analyst)
- date_range: The time period selected for analysis (e.g., Last 30 Days, Lifetime)

5) Event Name: date_range_changed

When it fires: This event is recorded when a user changes the date range filter in any tab (Overview, Segmentation, or Activity), such as switching from "Last 30 Days" to "Last 12 Months."

Why we track it: Date range changes show us how users are exploring their data across different time periods. This helps us understand whether users are looking at recent trends or long-term patterns.

Key Properties:

- brand_id: The brand making the change
- user_role: The user's role (e.g., Admin, Analyst)
- previous_range: What date range was selected before the change (e.g., Last 30 Days)
- new_range: The new date range that was selected (e.g., Last 12 Months)

6) Event Name: campaign_navigation

When it fires: This event fires when a user navigates from the Customer Insights page to the Campaigns section to create or manage marketing campaigns.

Why we track it: This is a critical conversion point that shows users are moving from insights to action. It helps us measure how effectively Customer Insights drives users to take marketing actions based on their data.

Key Properties:

- brand_id: The brand navigating to Campaigns
- user_role: The user's role (e.g., Admin, Analyst)
- from_tab: Which Customer Insights tab they were on before navigating (e.g., Overview, Segmentation)
- campaign_type: The type of campaign they're likely to create (e.g., Email, SMS, WhatsApp)

7) Event Name: insight_info_opened

When it fires: This event triggers when a user clicks on an informational tooltip or help icon to learn more about a specific metric or customer segment (for example, reading about what "Loyal customers" means or how a metric is calculated).

Why we track it: This shows us whether users are actively seeking to understand the data better. High engagement with educational content suggests users want to learn, while low engagement might mean the interface needs to be clearer.

Key Properties:

- brand_id: The brand viewing the information
- user_role: The user's role (e.g., Admin, Analyst)
- info_key: Which specific piece of information was accessed (e.g., Loyal Segment Info, RFM Definition)

8) Event Name: customer_search_performed

When it fires: This event is recorded when a user uses the search function to look up a specific customer in the Customer List or Activity tab.

Why we track it: Customer searches indicate that users need to find information about individual customers quickly. This helps us understand search patterns and ensure the search functionality meets user needs.

Key Properties:

- brand_id: The brand performing the search
- search_query: What the user searched for (e.g., customer name, email, or phone number)
- user_role: The user's role (e.g., Admin, Analyst)

Step 3: Describe 2-3 Amplitude Dashboards You'd Build

1) Dashboard Purpose: "Customer Engagement & Retention"

Dashboard Purpose:

This dashboard helps us understand how users are interacting with the Customer Insights feature and whether they keep coming back over time. The main goal is to track engagement patterns and measure customer retention across different time periods, such as monthly or quarterly intervals.

Chart Type: Retention & Segmentation

- **Retention Chart:** This chart shows what percentage of customers continue to engage with Customer Insights after their initial visit. We'd break this down by RFM segments (Recency, Frequency, Monetary) to see which customer groups are most engaged with the feature.

- **Segmentation Chart:** This visualization displays the distribution of active customers across different categories like Loyal, At Risk, and New customers, helping us understand the composition of our engaged user base.

What Events You'd Track:

- **page_view:** Tracks every time someone visits the Customer Insights page, showing us overall feature usage.

- **filter_applied:** Monitors how often users apply filters like Customer Segments or Date Ranges, indicating they're actively exploring their data.

- **export_clicked:** Records when users export Customer List data, which suggests they're finding value in the information.

- **campaign_navigation:** Captures when users move from Customer Insights to the Campaigns section, showing they're ready to act on their insights.

What Insights It Would Reveal:

- **Engagement Retention:** We'd see how many customers return to the Customer Insights page and continue using it over time. This helps us understand if the feature has lasting value or if users drop off after initial exploration.

- **Actionable Behavior:** By tracking specific actions like applying filters or exporting data, we can measure how these behaviors correlate with continued engagement and retention.

- **Customer Segmentation:** We'd identify which customer segments (such as Loyal or At Risk customers) are most likely to actively use the platform, giving us clear targets for educational campaigns and feature improvements.

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2) Dashboard Purpose: "Repeat Customer Behavior"

Dashboard Purpose:

This dashboard focuses specifically on understanding how repeat customers behave within the system. The goal is to track patterns in repeat purchases and spot opportunities to re-engage customers who are becoming less active or showing signs they might stop buying altogether.

Chart Type: Funnel & Segmentation

- **Funnel Chart:** This visualization tracks the journey from being a Repeat Customer to becoming a Loyal Customer. It shows the progression through key milestones like first purchase, repeat purchase, engagement with the loyalty program, and actual redemption of rewards.

- **Segmentation Chart:** This chart compares spending patterns between repeat customers and new customers, helping us identify whether repeat customers maintain, increase, or decrease their spending over time.

What Events You'd Track:

- **page_view:** Focuses specifically on tracking when users view pages related to repeat customer data in Customer Insights.

- **filter_applied:** Monitors when users apply filters specifically for Repeat Customers or Loyal Customers, showing they're investigating these important segments.

- **campaign_navigation:** Tracks whether users move to the Campaigns section after analyzing repeat customer behavior, indicating they're planning to take action.

- **export_clicked:** Records when users export repeat customer data for deeper analysis outside the platform.

What Insights It Would Reveal:

- **Repeat Purchase Behavior:** We'd gain a clear picture of how repeat customers behave—specifically, how many come back for additional purchases after their first repeat order and what that pattern looks like over time.

- **Segmentation by Spend:** By comparing average spending between repeat and new customers, we can identify if repeat customers are spending less over time, which might signal decreasing engagement or satisfaction.

- **Churn Prediction:** The funnel would help us identify exactly where customers drop off in their journey. For example, if many customers stop purchasing after a certain period following their last repeat order, we can proactively reach out to them before they churn completely.

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3) Dashboard Purpose: "Campaign Effectiveness Based on Customer Insights"

Dashboard Purpose:

This dashboard measures how well marketing campaigns perform when they're based on insights from the Customer Insights feature. The goal is to understand whether using data-driven customer segmentation actually leads to better campaign results, higher engagement, and increased sales.

Chart Type: Segmentation & Funnel

- **Segmentation Chart:** This shows how different customer segments (like Loyal, At Risk, or Potential Loyalist) respond to specific campaigns, helping us identify which groups are most receptive to different types of messaging.

- **Funnel Chart:** This tracks the complete customer journey from viewing a campaign all the way through to making a purchase and redeeming loyalty rewards. We'd break this down by customer segment to see which groups convert best.

What Events You'd Track:

- **campaign_navigation:** Captures when users move from Customer Insights to the Campaigns section after identifying specific segments they want to target, showing intent to act on data.

- **campaign_sent:** Records when a campaign is actually sent to a particular customer segment, giving us a baseline for measuring results.

- **page_view:** Tracks engagement with campaign results pages, showing whether users are monitoring their campaign performance.

- **export_clicked:** Monitors how many users export campaign data for further analysis, indicating they're serious about understanding campaign effectiveness.

What Insights It Would Reveal:

- **Campaign Impact:** We'd clearly see how different customer segments respond to various campaigns and which segments show the highest engagement rates or conversion rates. This helps optimize future campaign targeting.

- **Customer Retention via Campaigns:** By tracking customer behavior after campaigns, we can identify whether specific campaigns successfully retain repeat customers or convert at-risk customers back into loyal ones.

- **Sales Impact:** Most importantly, we'd measure the direct correlation between targeted campaigns (based on Customer Insights data) and actual purchases. This reveals the real revenue impact of using data-driven segmentation for marketing, proving the value of the entire Customer Insights feature.

Step 4: Document Your Naming Conventions and Explain Why You Chose Them

Event Naming Conventions:

[object]_[action] Format:

To keep everything organized and easy to understand, I've adopted a simple naming convention that follows the pattern [object]_[action]. This format clearly identifies what's being tracked (the object) and what the user is doing with it (the action).

Examples:

- **page_view:** This event name tells us the object is a page and the action is viewing it.

- **filter_applied:** This tracks when a user applies a filter to narrow down or organize customer data.

- **export_clicked:** This captures when a user clicks the Export button to download customer information.

- **segment_card_clicked:** This records when a user clicks on a customer segment card in the Segmentation tab to explore that group further.

Why This Format Works:

- **Consistency:** The [object]_[action] structure creates a predictable pattern that's easy to follow. No matter what event we're tracking, the naming logic stays the same, which helps everyone on the team understand it quickly.

- **Clarity:** You can immediately tell what's happening just by reading the event name. There's no ambiguity or need to dig through documentation to understand what "page_view" means—it's right there in the name.

- **Scalability:** As we add more events to track additional features or user behaviors, this format makes it simple to create new event names that fit seamlessly with existing ones. We won't need to rethink our approach or create exceptions.

Lowercase and Underscores:

All event names and property names are written in lowercase with words separated by underscores (this style is called snake_case). This isn't just a stylistic choice—it's a practical standard in event tracking for several good reasons:

- **Readable:** It's much easier to read "filter_applied" than "filterApplied," especially when event names get longer or more complex.

- **Consistent:** Using the same capitalization style throughout prevents confusion and mistakes, particularly in systems that treat uppercase and lowercase letters differently.

- **Universal:** This format is widely used across popular analytics platforms like Amplitude and Mixpanel, which makes integration smoother and reduces friction when working with multiple tools.

Property Naming Conventions:

[object]_[attribute] Format:

Just like with events, I've used a consistent structure for property names: [object]_[attribute]. This makes it clear what object we're describing and what specific characteristic or detail we're capturing about it.

Examples:

- **user_role:** This property tells us the role of the person performing the action (for example, Admin or Analyst).

- **filter_type:** This specifies what kind of filter was applied, such as Customer Segment or Date Range.

- **brand_id:** This holds the unique identifier for each brand using the platform, allowing us to track activity by brand.

- **campaign_type:** This records what type of campaign was initiated, like Email, SMS, or WhatsApp.

Why This Format Works:

- **Clarity:** The [object]_[attribute] pattern makes it immediately obvious what information the property contains. You don't have to guess what "user_role" means—it clearly refers to the user's role.

- **Simplicity:** These property names are straightforward and self-explanatory, which means anyone looking at the data can understand it without needing extensive training or documentation.

- **Consistency:** When all properties follow the same naming logic, it becomes much easier to filter, query, and analyze data in tools like Amplitude. Everything just works together smoothly.

Consistent Abbreviations and Terminology:

I've deliberately kept property names concise while still making them descriptive. This means using standard, recognizable terms that everyone on the team will understand.

Examples:

- **user_role:** This represents the user's role in the system (Admin, Analyst, etc.). By consistently calling it "user_role" everywhere, we avoid confusion that could arise from calling it "role," "user_type," or something else in different contexts.

- **campaign_type:** Instead of using varying terms like "campaign_channel" or "campaign_method," I've stuck with "campaign_type" throughout, ensuring everyone knows exactly what this property represents.

Why This Approach Matters:

- **Reduces Confusion:** When we use the same standard terms across all properties, team members don't have to wonder if "user_role" and "role" mean the same thing—they know it's always "user_role."

- **Increases Data Quality:** Consistent naming leads to cleaner, more reliable data. When everyone uses the same conventions, there are fewer errors, duplicates, or inconsistencies that can compromise our analysis.

Event and Property Naming Examples:

Example 1:

- **Event Name:** page_view
- **Property Name:** user_role

- **Description:** When someone views a page in the Customer Insights section, the "user_role" property tells us whether they're an Admin, Analyst, or another type of user.

Example 2:

- **Event Name:** filter_applied
- **Property Name:** filter_type
- **Description:** When a user applies a filter in Customer Insights, the "filter_type" property specifies whether they're filtering by Customer Segment, Date Range, or another criterion.

Why These Conventions Matter Overall:

This systematic approach to naming ensures that our event tracking remains consistent, readable, and easy to use as our system grows. It prevents confusion as new team members join or as we add more complex features. Most importantly, it means that anyone—whether they're a product manager, data analyst, or engineer—can look at our event data and immediately understand what's happening without needing to constantly reference documentation or ask questions. Good naming conventions are the foundation of reliable, actionable analytics.

Conclusion

Throughout this assignment, I've worked to create a practical and thorough event tracking plan for Reelo's Customer Insights feature. The goal has been to capture the user interactions and behaviors that really matter—things like how often people view pages, which filters they apply, which customer segments they explore, and when they export data for further analysis.

I've also outlined several Amplitude dashboards that would help the team keep a pulse on what's happening with their customers. These dashboards focus on understanding customer behavior patterns, measuring how well repeat customer engagement is working, and evaluating whether marketing campaigns are actually delivering results. With these tools in place, Reelo's team would have a clear view of what's working and what needs adjustment, helping them improve customer retention, boost repeat orders, and ultimately make customers happier.

One thing I've been careful about is maintaining clear and consistent naming conventions for all events and properties. This might seem like a small detail, but it makes a huge difference when you're actually working with the data. Clean, logical naming means the data is easier to understand, simpler to query, and ready to scale as the product grows. This foundation will help Reelo make smarter, data-driven decisions that support the company's long-term growth.

Final Thoughts

Everything I've outlined in this report—the event tracking plan, the success metrics, and the dashboard proposals—is designed to give Reelo a clear roadmap for tackling their current challenges. By understanding their customer data better and knowing exactly which segments to focus on, Reelo can fine-tune their approach to keeping customers engaged and coming back. It's about turning insights into actions that drive real business results.

Thank You

Thank you for taking the time to review this assignment. I genuinely enjoyed working through these challenges and thinking about how to solve real problems with data. I'd love the opportunity to contribute to Reelo's continued growth and success, and I'm excited about the possibility of being part of the team.
