

Project Scope Exploration

Introduction and Objectives

This document outlines the proposed approach and preliminary scope for the Braze email marketing project.

To do this, we must take the time to scope the project properly before providing any estimation. This will be done via a scoping exercise as outlined in this document.

The focus is on developing a robust and responsive email template system that aligns with current marketing strategies. We will need to develop a series of emails that can be easily managed by any user regardless of technical skill level.

Yet, we must also consider the actual core requirements of the email project:

1. Match branding standards to the best of their ability
2. Be responsive and work on desktop as well as mobile devices
3. bug free and display correctly on email clients
4. Load quickly by using streamlined assets

To find the middle ground of developing an email system that is both flexible and easy to use, but still robust enough to work across various devices will look good is something we will need to plan thoughtfully before development.

Initial Project Scope

The initial phase will focus on reviewing the existing designs available in Figma. I will analyze the current designs and that an inventory of what the current designer has tagged in the design documents. I will review and list any questions I have in terms of structure.

Likewise I will identify and tag any components and start grouping them for builder components. I will make notes of any components that require more attention in coding and special consideration.

This should provide a good baseline in understanding the email template building blocks, and developing questions I could ask the designer to learn more about their process.

Access Requirements

Access to a Braze CRM instance is essential, along with the contact details of the Customer Success Manager or support team for technical assistance.

You can set me as a standard user with temporary credentials. If you can do this beforehand and great a SANDBOX. If you have any trouble doing this, I can guide you via screenshare.

I have added link to the documentation:

<https://learning.braze.com/braze-dashboard-basics/1375503>

Just as a note throughout the project I will reference the standard documentation to make it easier to troubleshoot anything if we use the same docs.

Email Demo Build

The project will commence with the development of an email template using Braze's in-app builder. I will be doing this 100% with the tool. I will avoid using any custom HTML if I must. The reason for this is that we should see how robust the in-app template builder is. Many different users may need to make emails, then they should not have to deal with any "code" and work in the editor.

Most editors have limits. The second part of this exercise is to use custom HTML blocks I made using industry best standards and leverage them with the editor to make a more robust template.

The reason this is necessary is that I can scope the time, but also assess limitations that can help define how to move forward with the not only building templates but helping users to build new emails using these modular blocks.

Next Steps in Project Planning

Analysis of Requirements: Based on the findings from the initial exploration, I will determine the types and number of email templates needed to meet the project objectives.

Modular Design: Identify components that can be standardized and reused across different email templates.

Customization Assessment: Evaluate the necessity and feasibility of custom HTML blocks alongside in-app builder components to enhance flexibility and robustness.

Timeline Building

After establishing the scope of the email templates and reusable blocks, I will develop a detailed timeline that includes:

Development Phases: Clear milestones for the creation of each template and reusable block.

Review and Feedback Points: Scheduled times for client reviews and iterations to ensure alignment with expectations and needs.

Budget Estimation: An itemized budget covering all aspects of the development process, including build, documentation, and training.