

# Senior CRM Specialist Trial exercise

Rafael Fagundes  
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# About me



## Rafael Fagundes

Lisbon, Portugal

Computer Engineer

[linkedin.com/in/rsfagundes](https://www.linkedin.com/in/rsfagundes)

10+ years of experience driving customer engagement through data-driven CRM strategies across global brands like Nestlé and Dell. Currently based in Portugal, open to relocating to Spain. I'm passionate about using data to create meaningful customer journeys.

Here's how I'd apply that at Lingokids.

## 14-day CRM strategy

# Considerations

- This 14-day CRM strategy focuses on engaging users and converting free to paid, using segmentation, multichannel messaging, and A/B testing to drive optimization.
- This strategy also supports cross-functional collaboration by aligning data, product, and content around a shared customer journey.
- Although built for Braze, this strategy is adaptable to other CRM platforms with app integration, like OneSignal or Iterable.
- Using Lingokids' 78M users since 2016, I estimated 200K–300K new users/month. With a \$14.99 plan and 10% uplift, the strategy could add \$300K–\$450K/month in revenue by improving early engagement.
- The 200K–300K estimate is a conservative projection from 78M users over 9 years, adjusted for inactive or duplicate accounts (~722K/month average).
- Formulas used:  
Avg New Users per Month = Total Registered Users ÷ Total Months Active  
Estimated Revenue Impact = Avg New Users per Month × Conversion Uplift × Subscription Price

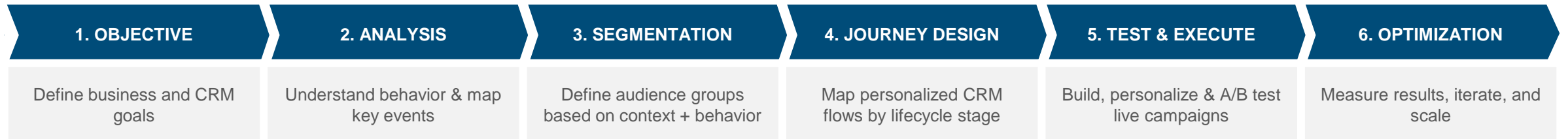
*Lower bound:  $200,000 \times 10\% \times \$14.99 = \$299,800 \approx \$300K$*

*Upper bound:  $300,000 \times 10\% \times \$14.99 = \$449,700 \approx \$450K$*

# My Go-To Framework for Effective CRM Strategy

To build a scalable and effective CRM strategy, I follow a **6-step framework** that combines business goals, user insights, and technical implementation. This structured approach ensures that all actions are data-driven, personalized, and optimized for real impact.

In the following slides, each stage will be clearly flagged to show how it connects back to this framework.



# All CRM decisions are tied back to the business objective

Before designing the CRM journey, it was essential to **define a clear business objective aligned with the company's goals**. The following table summarizes the strategic focus, how CRM contributes to achieving it, key success metrics, and a high-level estimation of potential business impact.

OBJECTIVE	Increase the conversion rate from free to paid users within the first 14 days after app download
HOW	<ul style="list-style-type: none"><li>• Activates users early</li><li>• Encourages repeated engagement</li><li>• Highlights the value of premium features</li><li>• Delivers personalized messages at the right time</li></ul>
SUCCESS METRICS	<p>Primary:</p> <ul style="list-style-type: none"><li>• Conversion rate (free → paid)</li></ul> <p>Secondary:</p> <ul style="list-style-type: none"><li>• Activity completion (Day 1–3)</li><li>• Session frequency</li><li>• Retention (Day 7 &amp; Day 14)</li><li>• Email/ In-App / Push metrics (Open rates, Click rates, etc...)</li></ul>
EXPECTED OUTCOME	10% increase in conversion rate
BUSINESS IMPACT	\$300K–\$450K in additional monthly revenue
EFFORT / IMPACT	4 / 4 * <i>(Used to define the priority level of a project)</i>

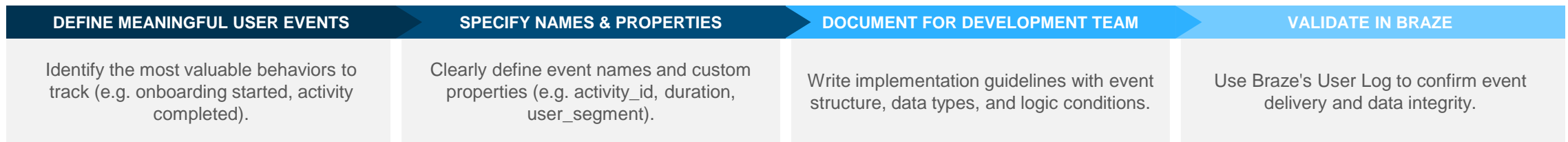
# Understanding How Parents Move Through the Funnel

To design an effective CRM strategy, we must understand how parents interact with Lingokids app across each stage of the journey.

Funnel stage	What parents do	What we track
AWARENESS	Sees ad on Instagram/Facebook Hears about Lingokids from a friend Reads blog or online review	Ad impression or click Blog/referral traffic
INTEREST	Visits Lingokids website	Website visit
ACTIVATION	Downloads the app Opens app and explores free content Completes first or second activity	App install Onboarding started / App opened First activity completed
CONVERSION	Subscribes to a paid plan	Paid plan activated
RETENTION & ADVOCACY	Uses app 3+ times per week Rates the app Refers other families Shares feedback or joins referral programs	Weekly active usage App review submitted Referral sent Feedback form or referral page visited

# How I Define and Validate Events to Enable Smart Segmentation

To enable powerful segmentation and accurately track user behavior, **I work closely with the development team to define and implement key in-app events** using the Braze SDK. As a CRM Specialist, I lead the event strategy to ensure proper tracking, targeting, and activation logic. Below are the steps I follow to design and implement events in Braze:



## Example in Braze:

The `activity_completed` event, for instance, is triggered when a child finishes a learning activity in the app. It can be used to trigger follow-up messages like “Try your next adventure!” and to segment engaged users or detect drop-offs. In Braze’s Event User Log, we can confirm that the event is firing properly with all required properties set by the dev team.

The screenshot displays the Braze Event User Log interface. At the top, there's a search bar for 'Search Raw Event Logs' and a date range filter set to 'Nov 9, 2023 - Dec 8, 2023'. Below this, a table lists recent SDK and REST API requests. The first entry is a 'Rest API Request' for user 'Allan' on '8 Dec 2023 at 2:08'. A callout bubble highlights the 'Raw Data' for this event, showing a JSON object with the following structure:

```

{
  "event_name": "activity_completed",
  "user_id": "1234567890",
  "timestamp": "2023-04-03T10:15:00Z",
  "properties": {
    "activity_name": "Alphabet Song",
    "category": "Music",
    "time_spent": 180,
    "child_age": 4
  },
  "app_version": "5.6.2",
  "platform": "Android",
  "location": "ES"
}





```



## 4 Key Audiences to Personalize the CRM Journey

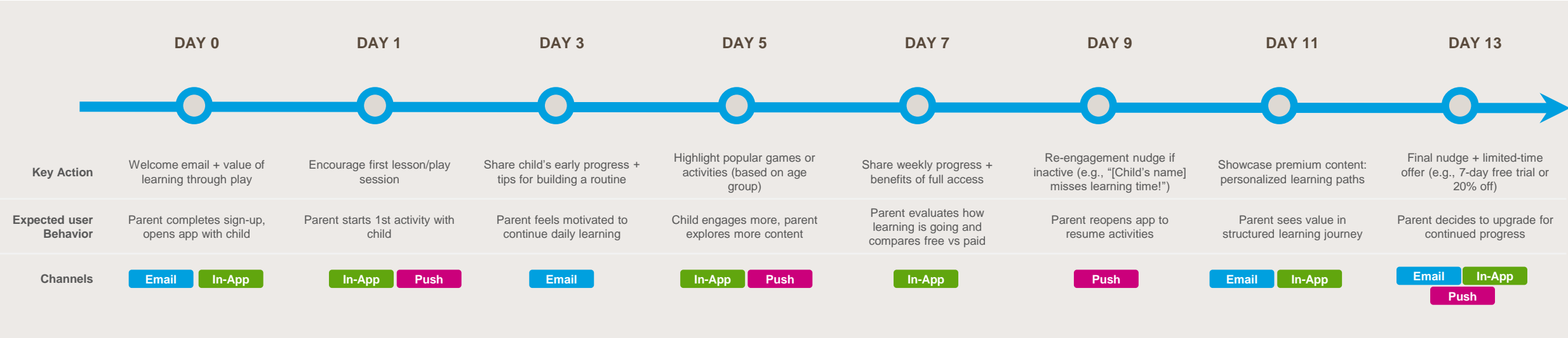
With the right events now tracked in Braze, we can build meaningful audience segments based on behavior, engagement level, context, and time since install. This segmentation enables personalized and timely CRM journeys tailored to each user's lifecycle stage and intent, increasing relevance and boosting conversions.

Below are four segments I've created, each based on clear criteria and defined objectives:

AUDIENCE	OBJECTIVE	CRITERIA
 <b>New &amp; Curious</b>	Encourage onboarding or first activity	<ul style="list-style-type: none"><li>• Install date ≤ 2 days</li><li>• Onboarding not completed</li><li>• App opened = 1</li><li>• No activity yet</li></ul>
 <b>First Engagement Achieved</b>	Reinforce habit and promote app usage	<ul style="list-style-type: none"><li>• Onboarding completed</li><li>• Activity started</li><li>• Session count = 2–3</li><li>• No upgrade views</li></ul>
 <b>At Risk of Churning</b>	Re-engage before churn	<ul style="list-style-type: none"><li>• Onboarding completed</li><li>• Install date = 4–9 days</li><li>• No activity in 2+ days</li></ul>
 <b>High Intent Not Converted</b>	Drive conversion to paid	<ul style="list-style-type: none"><li>• Completed onboarding</li><li>• Viewed upgrade screen</li><li>• Session count ≥ 3</li><li>• No paid plan</li></ul>

# 14 Days. 1 Goal: Convert.

This 14-day journey maps CRM touchpoints tailored to user behavior, timing, and intent. **It was designed for the “New & Curious” segment,** with other audiences following tailored flows based on engagement and conversion likelihood.



The rationale behind each channel choice is explained in the table below. Balanced communication strategy ensures value delivery without overwhelming users:

CHANNEL	WHY	WHEN
Email	Great for deeper engagement outside the app.	After sign-up or inactivity to share onboarding steps, tips, or upgrade offers.
Push	Ideal for timely nudges to bring users back to the app.	Best for quick reminders, emotional triggers, or urgent actions.
In-App	Best for guiding users in real time while they're active in the app.	During sessions to highlight features or prompt upgrades.

# Let’s Test, Learn, and Improve

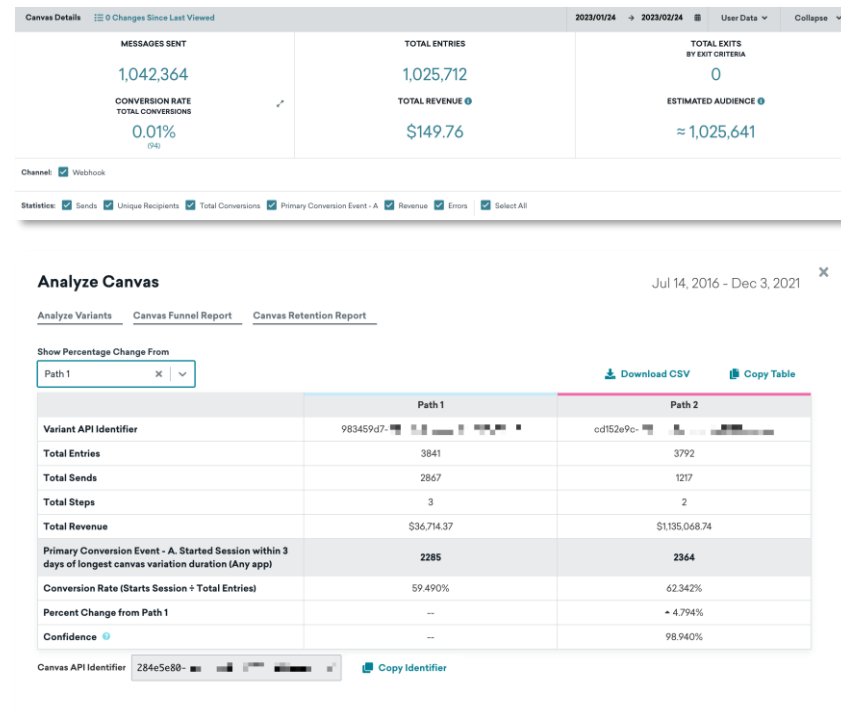
A **test-and-learn mindset ensures continuous improvement of the journey**, driving higher engagement and conversion. All experiments should be documented for future insights. Below are a few example tests to start with:

DAY	TOUCHPOINT	A/B TEST IDEA	GOAL
DAY 0	Email	Test different subject lines (e.g., playful vs. benefit-focused)	Increase open rate and curiosity
DAY 1	In-App	Variation of first activity CTA wording (e.g., “Let’s Play!” vs. “Start Learning Now”)	Boost first activity engagement
DAY 3	Email	Compare progress update formats: text vs. visual summary	Improve click-through and engagement
DAY 5	Push	Urgency language vs. curiosity language	Increase return-to-app rate
DAY 7	In-App	Test different screen placements for the upgrade prompt (e.g., top banner vs. end of activity)	Drive more pricing page views
DAY 11	Email In-App	Compare showcasing one feature vs. a bundle of benefits	Increase perceived value of subscription
DAY 13	Email Push	Discount offer (20% off) vs. 7-day trial message	Maximize final conversion rate

# Turning Results into Actionable Insights

To evaluate the impact of the 14-day journey, **we'll track the key metrics defined during the objective-setting phase**. This includes the primary metric, conversion rate (free → paid) and secondary metrics such as activity completion, session frequency, retention, and engagement rates across email, in-app, and push channels.

Using Braze, we'll monitor Canvas performance, compare journey-exposed users vs. control groups, and measure incremental conversions to guide ongoing optimization.



# Bringing It All Together!

**Clear business goal:** Drive free-to-paid conversion within the first 14 days.

**Structured framework:** Objective, analysis, segmentation, journey design, execution, and optimization.

**Data-first approach:** Events tracked in Braze enable precise segmentation and targeting.

**Tailored journeys:** Segments like “New & Curious” receive customized flows to boost engagement.

**Test & learn culture:** Continuous experimentation to improve performance and conversion.

**Proven impact:** Strategy could generate up to \$450K/month in additional revenue.

With the 14-day journey in place, we're ready to convert more families into engaged, long-term subscribers!

LingokIDS