# Only 37% of trials reach the aha moment. I start with the 26% who are one step away.

They connected a store but haven't imported a product, and the onboarding emails run on a timer instead of reacting to that step.

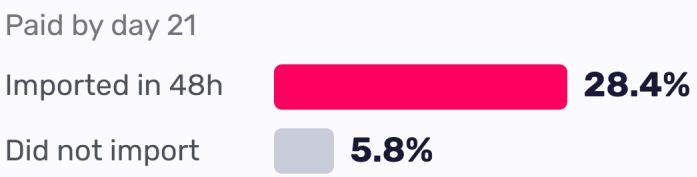
**37%**
import a product within 48 hours (19% on eBay)

**4.9x**
conversion gap: importers 28.4%, everyone else 5.8%

**4/4**
onboarding emails go out on a fixed day, not on behavior

# Three things the data says

## The aha moment is the bottleneck




A **4.9x** gap, in every channel and platform.

Only **37%** of trials get there, yet importers are 74% of all paid.

**eBay:** 25% of trials, 15% of paid. Only **38%** of connected eBay stores import (Shopify 65%).

## Paid Social scaled 49%, quality fell

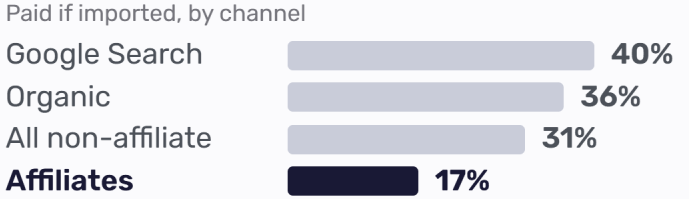



Trials/week **1,430 → 2,140** from Aug 31. Trial-to-paid **13.5% → 10.7%**.

Other channels held (15.8% → 15.6%). Paid Social explains almost all of the overall drop, 15.0% → 13.5%.

Even its importers convert less (26.8% → 21.5%): lower-intent traffic, not worse onboarding.

## Affiliates activate, then don't pay




Connect 63%, import 37%: same as Organic.

Paid-if-imported **17%** vs **31%** for every other channel.

18% of trials, 11% of paid. A question for Partnerships, not a CRM fix.

Correlation, not causation: "did not import in 48h" includes late importers. The opportunity math discounts for it.

# Three things I would not trust as-is

### 1 Week of Aug 31: zero attributed conversions in all 13 campaign rows

Clicks were in line with volume (1,616, excluding the one-off AI launch email) and the cohort converted at 14.9%. Any email report for that week is wrong, and the 8-week averages are understated by ~12%.

**Fix** • Most likely a billing-to-ESP sync failure. Daily reconciliation of subscription_started, product vs CRM, with an alert.

### 2 Onboarding emails fire on a timer, not on behavior

"Connect your store" reaches 97% of trials on every platform, although 48-hour connect rates range from 50% (eBay) to 69% (Shopify): it is sent by date, not by state. "Import your first product" (day 3) reaches 93%; at least 41% of Shopify recipients (32% overall) had already imported. Result: 0.1–2.4 conversions per 1,000 delivered and 59% of onboarding unsubscribes.

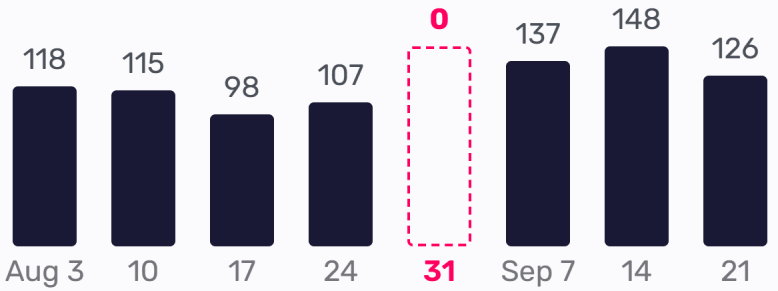
**Fix** • Event-triggered steps with an exit on the event.

### 3 Win-back is net negative

20,717 sends • 9 conversions • 500 unsubscribes (2.4%, ~3x the promo email, 5–11x onboarding) • spam 0.16%, above Gmail's 0.10% guideline in all 8 weeks (its hard limit is 0.30%). That is 55 unsubscribes per conversion, resent weekly to the same "churned 30d" people.

**Fix** • Pause; rebuild as one send by cancel reason.

Email-attributed conversions by week (ESP)




Week of Aug 31: clicks normal, every campaign at zero. A sync gap, not performance.

**Also not trusted**

Open rates (newsletter 63% open, 0.7% click: likely machine opens) • the active-base count (+350 every week vs ~600 churned a week) • promo and full-price conversions mixed in paid_conversions • 48h flags instead of timestamps.

Gmail thresholds: Google email sender guidelines, support.google.com/mail/answer/81126

# Fix first: make onboarding react to the one event that matters

## THE PICK

An event-triggered activation journey for the **1,196 trials a week** (26%) who connect a store but do not import a product within 48 hours, with an eBay-specific path. Not the largest group (37% never connect), but the closest to the aha moment.

### SENSITIVITY • EXTRA PAID A MONTH

pts moved ↓ • share of gap captured →

| | 25% | 50% | 75% |
|---|---|---|---|
| +10 pts | 29 | 58 | 88 |
| +20 pts | 58 | 117 | 175 |
| +30 pts | 88 | 175 | 263 |

# +117

**paid users a month**

+4.1% • 27 a week • ≈ $4.6K first-month MRR

1,196/week × **20 pts** more of them import (~25% → ~45%) = 239

× 22.6-pt gap (28.4% – 5.8%) × **50%** of the gap captured

= **27 paid/week ≈ 117 a month (+4.1%)**

Range: 29 (+10 pts / 25%) to 263 (+30 pts / 75%) a month. Test 1 tells us which row. Add a “never connected” branch: ~165 combined.

## WHY THIS ONE

Owned by CRM • no media budget

Targets the step after which conversion is 4.9x higher

Measurable with a holdout

## HANDED TO OTHER TEAMS

**UA** **~260 / month**

Paid Social back to its pre-Aug-31 rate. What changed on Aug 31?

**Partnerships** **~260 / month**

Affiliates paying like Organic once imported (36% vs 17%). What do we pay affiliates for?

**Product** **~20–60 / month**

The eBay import step. Small base, but it kills the worst email in the program.

**Assumptions** • campaign week = cohort week for trial flows • all cohorts complete to day 21 • attribution treated as last-click, one campaign per conversion (16% of paid; 19% excluding the outage week) • month = week × 52/12 • email rates on the 7 weeks with working attribution • the 5.8% includes trials that never connected; the target group’s own gap is at least 14 pts, so the 50% covers both causality and that mix (75% is an upper bound)

# The new 14-day program: every step has an entry and an exit event

| Track | Day 0 | +24h | +48–72h | Day 7–10 | Day 13 | Day 14–15 | Exit event |
|---|---|---|---|---|---|---|---|
| A Welcome | Welcome: one next step, by platform | | | | | | +24h → B or C stocked → C2 |
| B Not connected | | Platform nudge | Alt path or 15-min call | day 7 → E | | | store connected |
| C No import | | Message 1 + 3 products | We picked 3 + banner | day 7 → E | | | product imported |
| C2 Has a store | What you own, who bills what, one step | | | | | | store published → D |
| D Activated | | Order automation | Price/stock monitoring | Day 10 value recap | | | day 13 → F |
| E Stalled | | | | 2 emails a week • Paid Social: why before how | | | rejoins F at day 13 |
| F Trial ending | | | | | Message 2: billing / Afternoon: import nudge | Expiry notice / Day 15: A/B test 2 | subscription started |

## Global rules

Channels: email • in-app checklist and banners • push (phase 2) • SMS for the day-13 notice

- 1 marketing email a day, 4 a week
- No launch or promo blasts to trials
- An open ticket pauses sends for 48h
- A paid subscription exits everything
- 10% global holdout: transactional only

## HubSpot → Braze

The same program, term by term

| HubSpot | Braze |
|---|---|
| Workflow | Canvas |
| Enrollment trigger | Action-based entry |
| Active list | Segment |
| If/then branch | Audience Path |
| Goal | Exit criteria |
| Token | Liquid |
| Webhook | Connected Content |
| Suppression | Frequency capping + Global Control Group |

# Who gets treated differently, and with what data

### Platform: eBay

38% import-of-connected vs 65% Shopify; 1 conversion in 8,517 import emails

Waiting path for approval, eBay-specific import steps, human assist at +72h

### Funnel state

28.4% vs 5.8% paid rate between imported and not

Own track and exit per state; nobody gets a step they finished

### Intent: Paid Social

10.7% vs 15.6% for other channels; even importers only 21.5%

Slower cadence, “why” before “how”, no urgency before day 10

### Affiliates

Pay 17% when imported vs 31% elsewhere

Same journey, flagged for measurement; the fix is commercial

### Store at signup

None / own store / store with products already. A stocked store never needs “connect”

Track C2: publish, payments, first order

### Trial-end state

Activated users keep what they built; others weigh a promise

Different recap in Message 2; import nudge only to non-activated

| | |
|---|---|
| **Fields today** | first_name • platform_selected • store_name • products_imported_count • trial_end_date • plan_price • signup_source • affiliate_id |
| **Phase 2** | niche → 3 suggested products (Connected Content / catalog API) • orders_processed • price_updates_count • automation_enabled • has_store_at_signup |
| **Rules** | Every token has a fallback • phase-2 blocks are conditional • one QA test contact per segment |

# What the CRM is missing, and how I would get it built

**Today:** signup • store connected • product imported • subscription started, mostly as 48-hour flags

## MISSING EVENTS, RANKED BY THE UPLIFT THEY UNLOCK

1 **product_imported with timestamp + source**
Time-to-value is invisible today

2 **store_connection_failed (reason, platform)**
The eBay problem has no diagnostic

3 **automation_enabled • price_update_applied • first_order_fulfilled**
The value moments after import

4 **trial_end_at • payment_failed(reason) • subscription_canceled(reason)**
Billing moments the CRM cannot react to yet

5 **last_active_at**
Stalled detection, quiet sending

### Missing attributes

has_store_at_signup • niche • experience_level • affiliate_id • timezone

### Infrastructure

Daily billing-to-CRM reconciliation with an alert • one definition for “active paid” and “churned” • timestamps, not flags

### Dependencies

Support capacity for Message 1 replies and the +72h call • Product on eBay import • Data on reconciliation • CS/retention owns payment_failed

### How I get it prioritized

One-page tracking plan ranked by paid uplift • two events first • the 117/month estimate attached • a two-sprint-day ask • I write and run the QA cases

# The two messages that matter most

**ShipFlow** • Message 1 • eBay, 24h after connect, no import

**eBay store connected. One step to go.**

3 products ready to import. Your first listing takes about 3 minutes.

Hi {{first_name}}, {{store_name}} is connected to ShipFlow. The next step is the one that makes the trial worth it: import a product and let us track its price and stock.

**1** Pick a product • **2** Click Import: we write the listing and set your price rule • **3** Review the draft and publish.

These three are selling well this week:

| Product • source price<br>your price • margin | Product • source price<br>your price • margin | Product • source price<br>your price • margin |
|---|---|---|

Still waiting on eBay's approval? Import now and publish when it lands. We will remind you.

**Import my first product**

**Exit:** product_imported • **+48h follow-up:** "We created a draft for you. Publish it." • **Unknown niche:** platform top sellers

**ShipFlow** • Message 2 • Day 13, 9:00 a.m. local, billing notice

**Your ShipFlow trial ends tomorrow**

$39/month from {{trial_end_date}}. Here is exactly what happens.

Your trial ends tomorrow, {{trial_end_date}}. The facts:

> **Plan** — ShipFlow, $39/month, billed monthly, cancel any time
> **Charge date** — {{trial_end_date}}
> **What you keep** — your products, monitoring and order automation on {{store_name}}

[if 1+ products] What ShipFlow did in 13 days:
{{products_imported_count}} product(s) monitored •
{{price_updates_count}} price or stock changes applied automatically •
{{orders_processed}} orders processed without you touching them

Keep going: nothing to do. Want to stop? Cancel before {{trial_end_date}}:

**Review my plan** Cancel trial • Billing FAQ

Questions about billing? Reply here. A person reads every reply.

**Transactional:** reaches the holdout, no sales CTA • recap only when 1+ products are imported; phase-2 fields in conditional blocks • non-activated users get a separate afternoon import nudge

Today's trial-ending email is the best converter in the program (13.2 per 1,000 delivered); a clear billing notice protects that moment and the list (the 50% promo is already second in unsubscribes, 0.89%).

# Two tests first, four numbers every Monday

TEST 1

### Track C journey vs. the import email, event-triggered since weeks 1–2

| | |
|---|---|
| **Population** | Connected, no import at +24h (~1,200/week) |
| **Hypothesis** | +20 pts in imports within 72h of connecting (~25% → ~45%), the central case on slide 4 |
| **Metrics** | Primary: import within 72h • Guardrails: unsubscribes, trial-to-paid |
| **Sample** | Powered for +10 pts (25% → 35%, ~330 per arm); we run **2 full weeks** (~1,200 per arm), which also detects about +5 pts. The measured lift picks the row on slide 4. |

TEST 2

### Day-15 recovery: 50% off vs. a 7-day extension earned by importing

| | |
|---|---|
| **Population** | Expired, unconverted (~3,700/week) |
| **Hypothesis** | The extension converts at least as well and earns more revenue per expired trial |
| **Metrics** | Primary: revenue per expired trial at day 30 • 10% no-offer holdout answers cannibalization |
| **Sample** | 1.0% baseline, 50% relative change needs ~7,750 per arm ≈ **5 weeks** after the 10% holdout; a 30% relative change ≈ 12 weeks |

WEEKLY KPIS • EVERY MONDAY, BY PLATFORM AND SOURCE

1
**Trial-to-paid by cohort**
Day 21, full price vs promo

2
**72-hour activation**
% imported within 72h, median time to first import

3
**Incremental lift**
vs the 10% global holdout

4
**List health**
Unsubscribes and spam per 1,000 delivered • daily reconciliation pass/fail

Not on the dashboard: open rates.

# 60 days

WEEKS 1–2

## Quick fixes and measurement

- Pause win-back
- Exclude trials from launch and promo blasts
- Make the two onboarding emails event-triggered (Test 1's control)
- Ship Message 2 + the 10% holdout
- Daily billing-to-CRM reconciliation
- File the tracking plan

WEEKS 3–6

## Build the journey

- Tracks A–F live
- eBay waiting path
- Launch Test 1 (Track C vs the trigger)
- In-app checklist synced to CRM
- Paid Social "why first" variant
- The weekly lifecycle digest (Part 3) runs every Monday

WEEKS 7–8

## Read and hand over

- Read Test 1, roll out
- Launch Test 2 (~5 weeks, reads out after day 60)
- Rebuild win-back by cancel reason
- Hand-offs with numbers to UA, Partnerships, Product
- Phase-2 plan: push, SMS, dunning

## If I had more time

- Per-user event timestamps, to measure time-to-value instead of 48-hour flags.
- A cohort view by trial day, to see on which day trials stall.
- A no-offer holdout on the 50% promo, to measure how much of it is cannibalization.
- A diagnostic on the eBay import step with Product, before writing more eBay emails.