



Segment/Rudderstack APP Tracking Build

WHAT TO EXPECT

PROJECT OVERVIEW

Project Metrics

Audiences

Custom Tracking Plan Design

APPROVAL #1: Metrics, audiences, and custom tracking plan.

Custom App Instrumentation

APPROVAL #2: Tracked event list, TestFlight build, and Amplitude demo chart per customer journey.

Customer Data Activation & QA

Install Attribution

Customer Journeys

FINAL APPROVAL: Confirming you can build your own Amplitude charts and analysis after training.

Managed Data Layer

Next Steps: We want to collaborate with you, up-leveling your team along the journey. We will support you and your growth through the entire process, managing your data layer so you can focus on building your business.

QUOTE

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NEXT STEPS

WHAT TO EXPECT

At a high level, the customer journey analytics development process is comprised of the following steps:

1. **Strategy Alignment:** Through discovery, we'll fully understand what you hope to achieve with this project and
 - a. Set the in-scope tracking plan goals.
 - b. Select business North Star.
 - c. Present vertical focused (e-commerce, SaaS, Social, etc) KPI scorecard.
2. **Audit & Research:** Using the tracking plan goal sheet & workshops, we'll clearly define and represent your voice for the customer and the customer journeys that drive your business's unique value propositions. Second, we will refine your target audience -- i.e., with whom you want to engage, what is most important to them, and what actions drive their behavior and boost retention.
3. **Tracking Plan Design:** We will create an outline and per event plan for how best to organize the tracking of your website and how to best present it. Each of your most important customer journeys will be instrumented.
4. **Approval #1:** Client will provide feedback on and approve the Tracking Plan.
 - a. We will have a weekly sync to cover any questions you might have.
5. **Build Instrumentation into Your App:** Our engineers with extensive experience in instrumenting websites and apps will implement each customer journey sequentially.
 - a. After each customer journey is instrumented by engineering, the build will be pushed to TestFlight for testing and validation.
 - b. Upon sign-off by our data PM, we will setup demos of the new tracking using an analytics tool, Amplitude.
6. **Approval #2:** We will deliver the app one journey at a time. You will provide feedback and approval on the events and the properties collected for that journey from the Amplitude journey chart (***This process will be completed for all journeys***).
7. **Customer Data Activation:** We will delivery a business-ready company goals and KPI dashboard along with each customer journey chart.
 - a. We will configure and test your install attribution tracking.
8. **Approval #3:** We will train you in using Amplitude to follow the customer through their entire journey in the TestFlight app. Upon approval of each journey in TestFlight, you will give the green light to your engineering team to promote the code to production.
 - a. **Tracking New Features:** You will approve the project and green light any new feature instrumenting or new integrations needed.

9. **Managed Data Layer:** We are your embedded data team. We will setup a managed data layer with a data warehouse, all data transformations, and a business summary dashboard so you can track your customers and success.

PROJECT OVERVIEW

To add instrumentation to your app to unlock your startup's growth by leveraging the customer analytics you didn't know you had for better retention and monetization.

Project Metrics

Please list your primary KPIs. Improving these goals will be the focus of this project.

1. North Star KPI (What guides your business?):
2. 2nd KPI:
3. 3rd KPI:

Audiences

Please provide your projected audiences. All customer analytics will be built for these audiences:

1. Audience 1:
2. Audience 2:

Each of your defined project metrics above will allow you to measure and track your users throughout their customer journeys. You will be able to track your audiences back to their first action. Convert more visitors like them into users, into customers, and finally into evangelists who refer/social share your app.

Custom Tracking Plan Design

Your customers are important. Knowing which ones are more valuable and how they interact with your product can unlock massive app retention and growth. We are the voice of the customer for you. We will deliver forty (40) custom tracking events. A track call is how you record any actions your users perform, along with any properties that describe the action. For example, you might track

- User Registered

This action of the user would have properties: plan and marketing UTM campaign. With these custom events and the properties of the user, you will have a complete view of your customers' actions.

```

analytics.track('User Registered', {

  // Context of where event fires.
  source: 'iOS App -- Screen Name', // The screen/page/source location of the event firing.
  previousSource: 'iOS App', // The screen/page/source location of the event firing.
  journey: 'Onboarding', // The Customer Journey this event is fired from.
  category: 'Conversion Events', // Type of event.
  tags: 'support', // For A/B testing and feature flagging.

  // Event properties and user new information.
  ..properties: {
    plan: 'Startup',
    utmCampaign: 'Blog Registration Drive',
  }
}
}

```

We take the app flow diagram and build it into an instrumentation guide to understand each journey and will have all custom events listed on it. You will also receive a tracking plan Google Sheet that lists all user actions tracked. We will start with the main screen customer journey as the first designed journey to be tracked.

APPROVAL #1: Metrics, audiences, and custom tracking plan.

Custom App Instrumentation

Our team of web developers and engineers will instrument each custom event and user property to be tracked. As in the Custom Tracking Plan Design phase, we will implement the instrumentation one journey at a time. You get to approve each journey as we go.

You will receive a TestFlight build of the app with the new changes instrumented and an Amplitude journey to perform QA.

APPROVAL #2: Tracked event list, TestFlight build, and Amplitude demo chart per customer journey.

Customer Data Activation & QA

Install Attribution

You need to know where your visitors are coming from and which ones convert into your most valuable customers. We will setup install attribution so you can capture the source of your installs.

Customer Journeys

We will walk through each customer journey with you and through the entire process. You remain in control of what you want to promote to the app. Everything will stay in the TestFlight/Segment/Amplitude test environment until you approve.

With the instrumenting complete, we will demo the entire app customer journey in Amplitude and teach you how to run your own analytics.

FINAL APPROVAL: Confirming you can build your own Amplitude charts and analysis after training.

Managed Data Layer

We help you track your core business metrics. Unlock the value of your customers to make business decisions faster and retain your customers.

We help you activate your data. Sync customer data from your warehouse to the tools that your business teams rely on.

You will also be given access to your new data Warehouse (Snowflake) and custom BI dashboard to be able to keep a record of all historical customer events. At this time, you can also request any custom integrations with/to other vendors in your stack.

Next Steps: We want to collaborate with you, up-leveling your team along the journey. We will support you and your growth through the entire process, managing your data layer so you can focus on building your business.

QUOTE

Please find below the quoted price, timeline, and next steps for your Segment tracking project.

Delivery Summary

We estimate the total project workload to be 180 hours of work and two months time.

Timeline

The following timeline will guide the delivery process:

Milestone	Milestone Accountable Person	Weeks Effort		Complete?
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Milestone	Milestone Accountable Person	Weeks Effort		Complete?
Goals and Audiences	Data PM	1	8	
Custom Tracking Plan Design	Data PM	3	35	
Approval 1	Client	1		
Custom App Instrumentation	Engineering Team	6	80	
Approval 2	Engineering PM	1	12	
Customer Data Activation & QA	Data PM	1	25	
Approval 3	Client	1		
Managed Data Layer	Data Engineering Team	2	20	
Ongoing Support	Data PM	N/A		

NEXT STEPS

To kick-off the project, please schedule time with your data PM and engineering PM to set the Goals and Audiences. Second, please coordinate with Engineering to sign up for the correct licenses of Segment, [attribution vendor], Amplitude, and Snowflake. Thank you so much for the opportunity, and we look forward to working with you.

Best,
Matt S.

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