

# THE CRM MAINFRAME

|           | CAMPAIGNS                                                                                                        |                                                                                 | LIFECYCLE                                                                                                         | DATA                                                                                                                  | TECH                                                                                                                                                                 |
|-----------|------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ROLE      | <b>Scheduler</b><br><i>NL, Black Friday, Xmas</i><br>Low-skilled, Rotated<br><i>Copywriter, Brand, Marketing</i> |                                                                                 | <b>Orchestrator</b><br><i>Mapping, Journeys, Loops</i><br>High-skilled, Core<br><i>Architect, UX, Product, CX</i> | <b>Enabler/Challenger</b><br><i>Report, Analyse, Optimise</i><br>Mid-skilled, Shared<br><i>Scientist, Analyst, BI</i> | <b>Enabler/Facilitator</b><br><i>Built, Solve, Innovate</i><br>Mid-skilled, Shared<br><i>Developer, Product, QA</i>                                                  |
| GOALS     | <b>Incrementality</b><br><i>Uplift vs 10% Control</i>                                                            | <b>CRM effect</b><br><i>Uplift vs 1% Global Control</i>                         | <b>Growth</b><br><i>LTV, ARPU, MAU</i>                                                                            | <b>Measurement Dashboards</b><br><i>Tableau, Metabase, Amplitude</i>                                                  | <b>Infrastructure → Personalisation</b><br><i>SDK, APIs, Deeplinks, Events Attributes, Attribution, Templates, Dynamic content, Deliverability, Localization, QA</i> |
|           | <b>Retention</b><br><i>% of users active after X days (elbow curve)</i>                                          |                                                                                 |                                                                                                                   | <b>Analysis &amp; Hypothesis</b><br><i>Cohorts, Segments, Insights, SQL</i>                                           |                                                                                                                                                                      |
|           | <b>Activation</b><br><i>Setup→Aha!→Habit</i>                                                                     | <b>Engagement</b><br><i>Loyalty &amp; Advocay</i>                               | <b>Resurrection</b><br><i>Churn prevention</i>                                                                    | <b>Testing &amp; Optimization</b><br><i>A/B, False-door, Smoke, Signal</i>                                            |                                                                                                                                                                      |
| ARTEFACTS | <b>Channels</b><br><i>Email, Push, In-app, Inbox, SMS, Social, Print mail, Phone call</i>                        |                                                                                 |                                                                                                                   | <b>Taxonomy sheet</b><br><i>Naming convention, Track Status</i>                                                       | <b>Product Roadmap</b><br><i>Features, Bugs, Milestones</i>                                                                                                          |
|           | <b>Customer Engagement Platform</b><br><i>Braze, Moengage, Clevertap, Airship</i>                                |                                                                                 | <b>Loops</b><br><i>Trigger→Action→Reward</i>                                                                      | <b>Customer Data Platform</b><br><i>Segment, mParticle</i>                                                            | <b>System Architecture</b><br><i>Tools, Data, Flows, Rules</i>                                                                                                       |
|           | <b>Content Calendar</b><br><i>Airtable, Sheets, Jira</i>                                                         | <b>Rewards &amp; Milestones</b><br><i>Vouchers, Free-trial</i>                  | <b>Journey Mapping</b><br><i>Miro, Mural, Figma</i>                                                               |                                                                                                                       |                                                                                                                                                                      |
| AI        | <b>Generative + Agents</b>                                                                                       | <b>Machine learning</b><br><i>Predictive, propensity, recommendation models</i> |                                                                                                                   |                                                                                                                       | <b>Coding assistant</b>                                                                                                                                              |