BRAZE PERFORMANCE & **OPTIMIZATION** REVIEW

braze × leverup

A structured look at how much of your Braze investment is truly working.

Most teams don't revisit their Braze setup after implementation.

Journeys are live.
Dashboards look stable.
Engagement is acceptable.

And acceptable becomes the benchmark.

But stable isn't the same as optimized.

In mature Braze setups, we typically see:

- Plateauing engagement without a clear explanation
- Canvases that were never structurally revisited
- Workspaces that have grown more complex than originally intended
- Frequency overlaps no one intentionally designed
- AI features enabled, but not strategically leveraged
- Event structures shaped by go-live needs, not long-term growth
- Unclear ownership of experimentation
- Retention flows reacting to behavior instead of anticipating it

Nothing is broken, but growth flattens quietly.

And very few teams can clearly answer:

- What is our real Braze maturity level?
- Where exactly are we underleveraging the platform?
- How much incremental lift is realistically still available?

Most organizations assume their setup is in good shape. Very few have pressure-tested it.

WHO TYPICALLY ASKS FOR THIS REVIEW?

This review is designed for teams who:

- Have been using Braze for 6+ months
- Experience plateauing engagement or growing complexity
- Have unclear ownership or experimentation discipline
- Want to move from “using Braze” to using it intentionally

WHAT WE EXAMINE (THE SCOPE)

The audit focuses on five core performance dimensions:

1 DATA FOUNDATIONS

SDK/API hygiene, event tracking, and data usability.
Is your data structured for scale or just functional?
Are events and user properties aligned with today’s business priorities?

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2 ORCHESTRATION DISCIPLINE

Channel efficiency across Email, Push, IAM, SMS, Content Cards.
Is frequency intentional? Are control groups consistently used?
Are Canvases built for testing or just execution?

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3 LIFECYCLE COVERAGE

Mapping use cases from Acquisition to Re-activation.
Where does communication stop too early?
Identifying gaps in retention and re-engagement flows.

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4 FEATURE UTILIZATION

Assessment of Canvas Flow, Liquid, Catalogs, Connected Content.
Are advanced capabilities embedded or selectively used?

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5 ANALYTICS & AI

KPI structure, incrementality testing, AI readiness (Intelligent Timing & Selection). Is optimization structured with clear learning loops? Or dependent on individual initiative?

THE PROCESS & TIMELINE

Duration: 2-4 weeks (depending on workspace complexity)

Phase 1

KICKOFF & WORKSPACE ACCESS

Alignment on objectives, scope confirmation, and access setup.

Phase 2

DATA REVIEW & STAKEHOLDER INTERVIEWS

Workspace analysis + interviews with CRM/Growth/Marketing leads.

Phase 3

MATURITY SCORING & ANALYSIS

Structured evaluation across the five dimensions.

Phase 4

FINAL PRESENTATION & ROADMAP WALKTHROUGH

Clear findings, prioritization, and next-step recommendations.

WHAT YOU RECEIVE

Braze Audit Report

Comprehensive current-state assessment, identified performance gaps with real impact, and maturity scoring.

Optimization & Growth Roadmap

Prioritized action plan:

- Quick Wins (0–30 days)
- Mid-term Improvements (30–90 days)
- Strategic Initiatives (90+ days)

Executive Summary

An executive-ready summary focused on revenue and retention impact, not a generic best-practice deck.
Growth ambition requires scrutiny. Braze rarely underperforms because of the tool itself. It underperforms because it isn't re-examined with the same rigor it had at implementation.

ENGAGEMENT OPTIONS

Tier 1: Braze Health Check

Expert validation for teams already on the right track.

Best for: Smaller teams or early-stage Braze users.
Includes: High-level workspace & data review, channel utilization snapshot, analytics overview.
Deliverables: Summary deck, top 10 quick wins, 1x readout session (60 min).
Note: No deep data audits or stakeholder interviews.

Tier 2: Full Audit & Optimization Roadmap

The core offering to turn Braze into a growth engine.

Best for: Mid-to-large teams and mature Braze users.
Includes: Deep workspace audit, review of 20+ campaigns/Canvases, AI readiness assessment, up to 5 stakeholder interviews.
Deliverables: Full Audit Report, Maturity Scoring, prioritized 90-day roadmap.

Tier 3: Audit + Strategic Advisory

Long-term CRM transformation partnership.

Best for: Enterprise clients and complex ecosystems.
Includes: Everything in Tier 2 + advanced architecture review, AI deep-dive, competitive benchmarking.
Deliverables: Use case ideation workshops + 12 weeks advisory support (bi-weekly strategy calls).
Bonus: Preferred access and discounts for custom implementation & hands-on work by LeverUp.

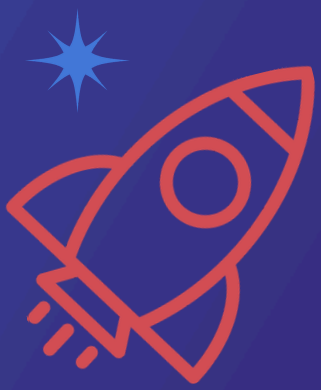
WHO WE ARE:

LeverUP is a Braze Silver Alloys Partner focused on CRM performance and lifecycle growth.

- 50+ CRM projects delivered
- 10+ dedicated Braze consultants
- 30+ Braze certifications

Based in Croatia, serving clients across Europe, we operate as a performance-focused extension of your team, not as an external compliance auditor.

If you'd like a structured performance baseline before your next planning cycle, we can outline how the review would apply to your current setup.

Ready to empower your team?

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