



# CX-Driven Marketing Playbook

How to create compelling experiences to acquire, engage, and retain your best customers.



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# CX-Driven Marketing Playbook

In this playbook, we explore ways that any business can start to create better customer experiences right away.



# Experience matters

CX-driven marketing is the only way forward

No matter your business, consumers increasingly demand that their specific needs and wants are met — whether that's accelerated service, relevant offers, easier connection among their devices, or more personalized interactions. In fact, **81%** of customers expect faster service as technology advances and **73%** expect better personalization.

Brands are expected to provide experiences that not only meet but also exceed customer expectations. Yet, a whopping **88%** of executives think their customers are changing faster than their business can keep up.

In this playbook, we explore ways that any business can immediately create better customer experiences. Let's start by highlighting the importance of mobile to the customer experience.

**81%**

of customers expect faster service as technology advances

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**73%**

expect better personalization

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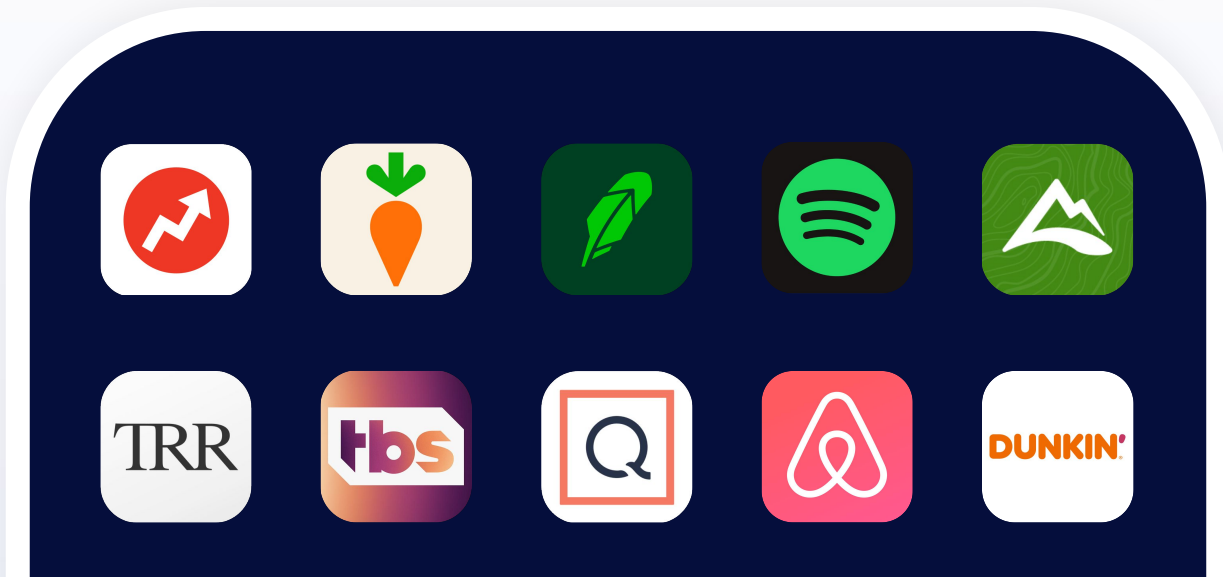
**88%**

of executives think their customers are changing faster than their business can keep up

# Mobile is massive

Not only is mobile growing, but apps are also flourishing. 70% of digital time takes place on mobile — of that, 88% of time is spent in apps. And app users are better in every way.

The [Mobile Growth survey](#) found that for every one dollar a non-app user spends, respondents reported that, on average, app users spend \$3.30 — **more than 3 times as much**. Superior mobile experiences through deep linking and measurement are key to this success.



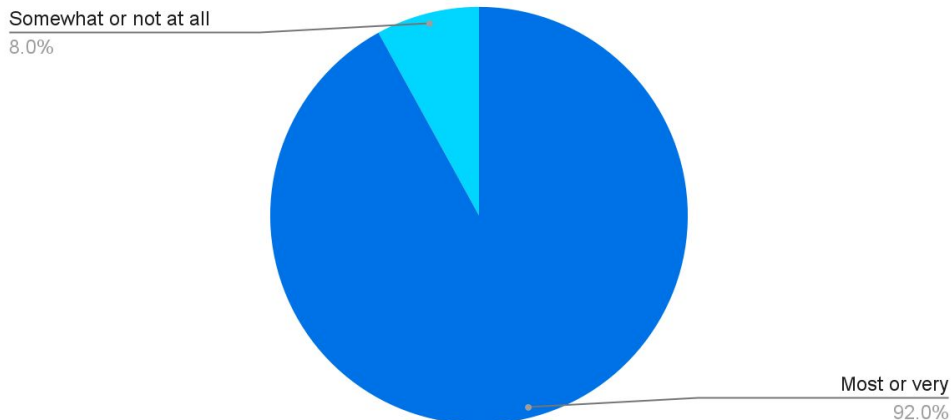
**Mobile apps are the main  
source of customer growth  
and retention.**

# What leaders are saying about business growth

**Mobile apps are the main source of customer growth and retention.**

92% of respondents to the Mobile Growth survey said their mobile app was either a very important or their most important platform when considering customer acquisition and retention.

**How important is your mobile app to customer growth and retention?**



Source: Branch Mobile Growth Survey, 2022/23

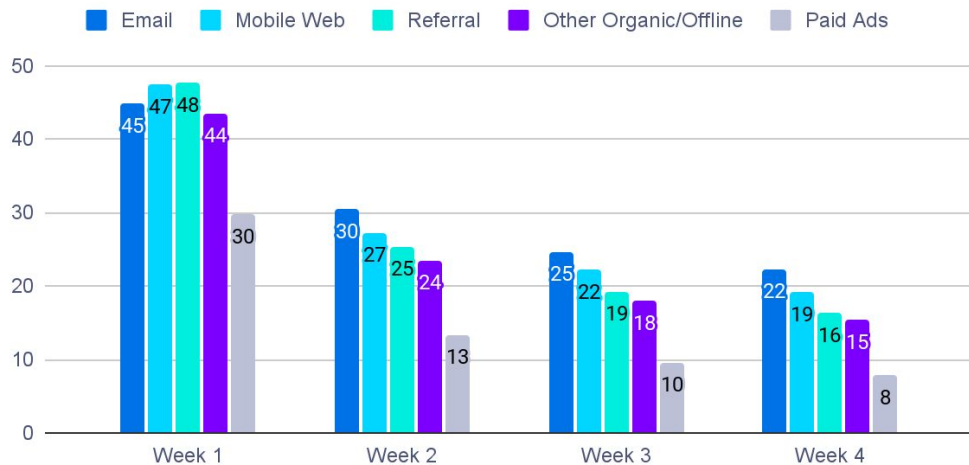
Methodology: Respondents were selected based on their standing as a member of the broader mobile growth community. Polling took place between July 2022 and January 2023. Responses included a diverse makeup of industry professionals with 47% based in North America, 38% in APAC, 11% in EMEA, and 5% in LATAM. 57% of respondents were active customers of Branch at the time of the survey.

# Retention is the new bar

In the past, getting users for your app was pretty straightforward: Convince them to download the app. Then, they'll keep coming back because the app is right there on the home screen. But today, it's more important than ever to provide experiences that keep users hooked and coming back for more.

Truly profitable apps must develop deeper relationships with their customers. Engagement and retention, which hinge on organic channels, are the new bars for success. In a Branch Benchmark study, we found that channels like email, mobile web, and referrals typically exhibit 2x or higher retention rates than ads after four weeks.

## Retention rate for acquisition channel

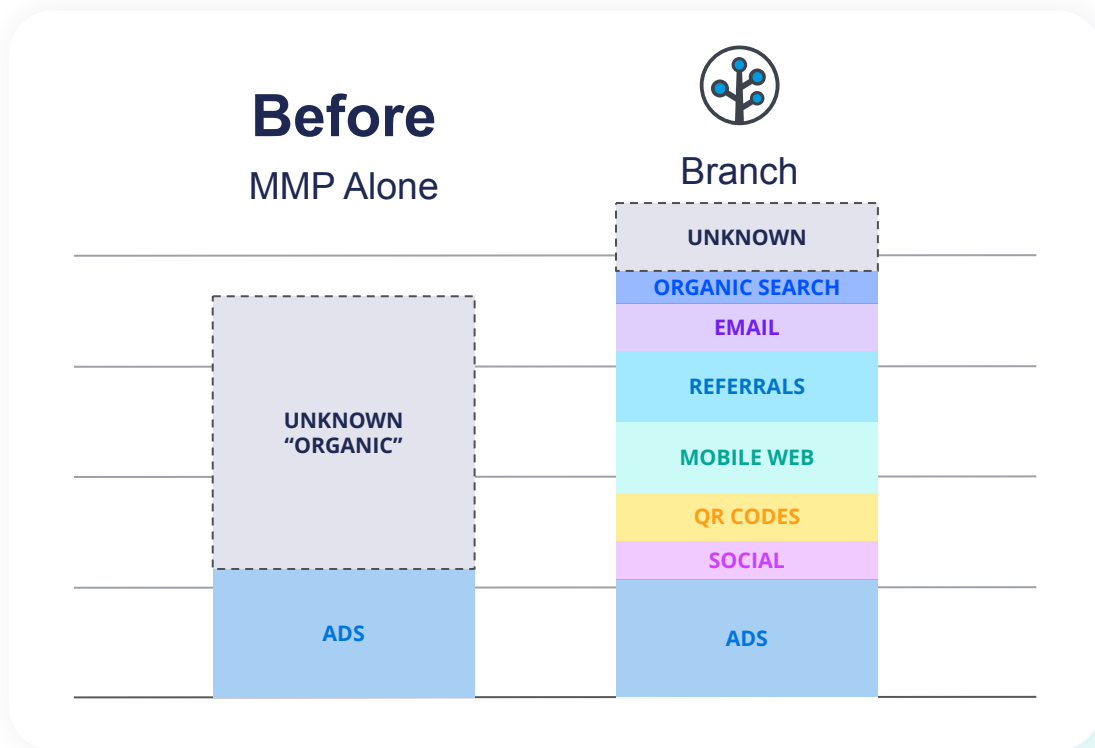


Source: Branch Benchmark Study, 2022

# Understand the customer experience

Of course, you can't fix or optimize the customer experience unless you understand it. Where are your best customers coming from? What channels convert best? Where do users drop off? What data can you use to make experiences better? How can you test theories?

Answer these questions and more with [mobile linking](#) for your owned and earned channels, coupled with [mobile measurement](#) for all your paid channels. True cross-channel, cross-platform measurement and attribution is the only way to understand what works and what doesn't, where to increase or decrease investments, and how to optimize campaigns.



# Create great customer experiences

Mobile is essential for any great experience, and apps are the best way for brands to stay connected to customers. Let's examine real-world examples of exceptional customer experiences that drive app engagement across the user journey.



Deferred deep linking



Personalized onboarding



Offline QR codes



Desktop QR codes



Smart banners



Email to app



SMS + push notifications



Social media to app



Deep linking in campaigns



In-app-only experiences



Referrals



Content sharing

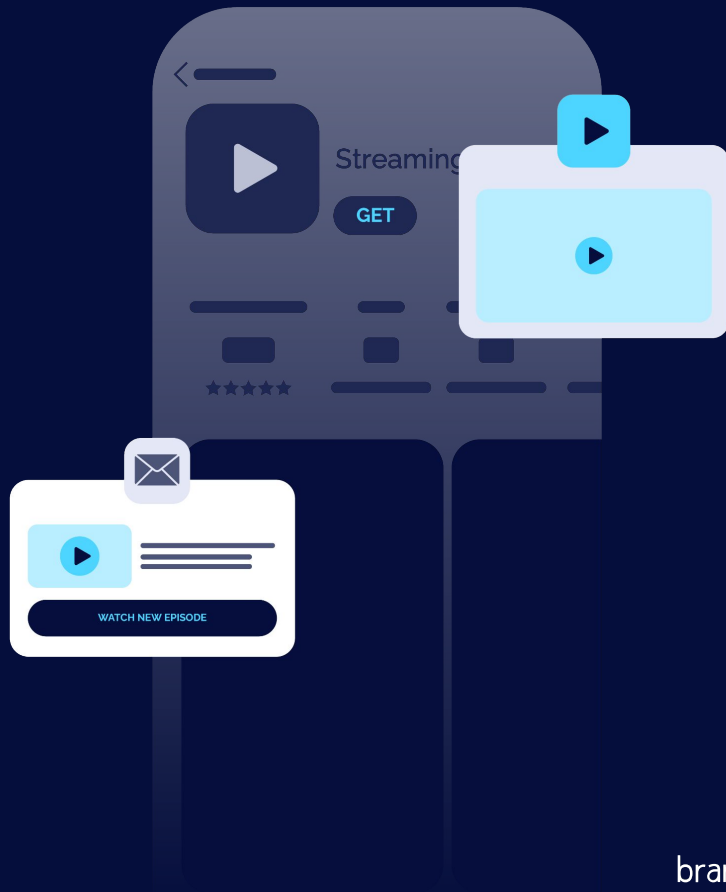
# Deferred deep linking

Take new users to the right content after they download

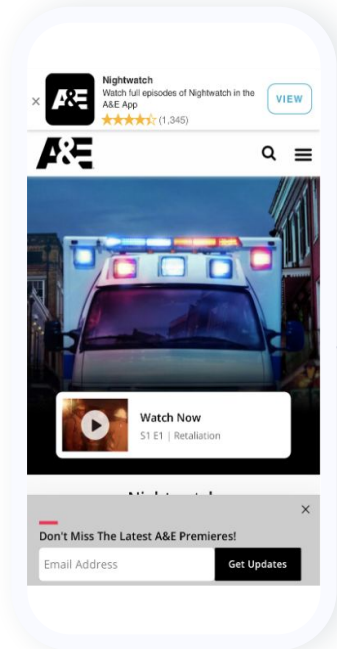
Meeting mobile user expectations is imperative. Enter deferred deep links: a game-changer in ensuring seamless and satisfying app experiences.

Deferred deep links route the user to the intended content through the installation process. They match the user who clicked a link on a paid or organic channel to the user who opened the app for the first time after installing it. Then, they automatically show the content that was clicked before the app install, thereby creating a seamless, convenient user experience.

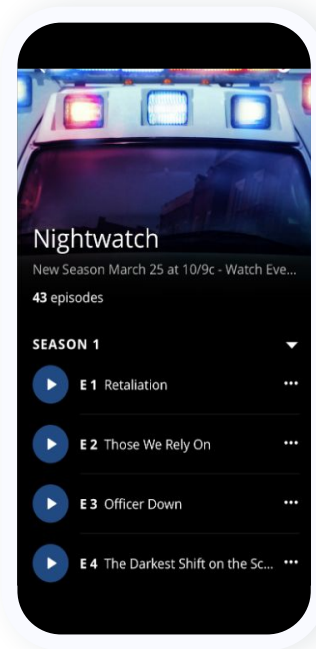
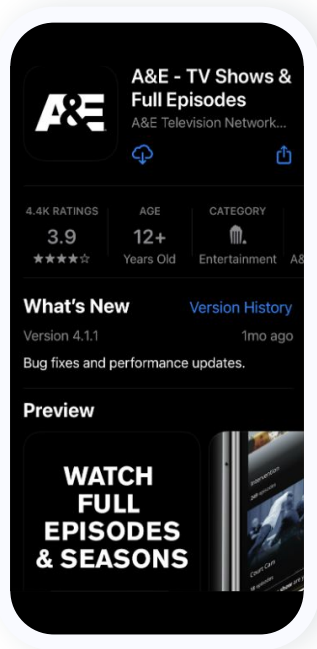
A deferred deep link might assist a new user in completing a purchase or ensure a new shopper is enrolled in a loyalty program and receives credit for their very first purchase. By providing a direct pathway, deferred deep links empower customers to engage with a brand on their terms.



# A&E example



Custom Journeys banner displayed on the mobile site



User is taken directly to the same page in the app via deferred deep linking



## Quick tips

- ✓ **Serve exceptional experiences — no matter what**  
Implement deferred deep linking to seamlessly direct users to relevant content, whether they already have the app installed or are installing it for the first time. No matter who the user is, they will get an exceptional experience.
- ✓ **Store custom data parameters**  
Use customized or branded URLs and store custom data parameters within the link data with deferred deep links.
- ✓ **Track LTV with deep links**  
Better track customer lifetime value and gain insights into the channels that drive performance.

[Read the case study](#): Adobe Spark drove a 95% increase in conversions with deferred deep linking.

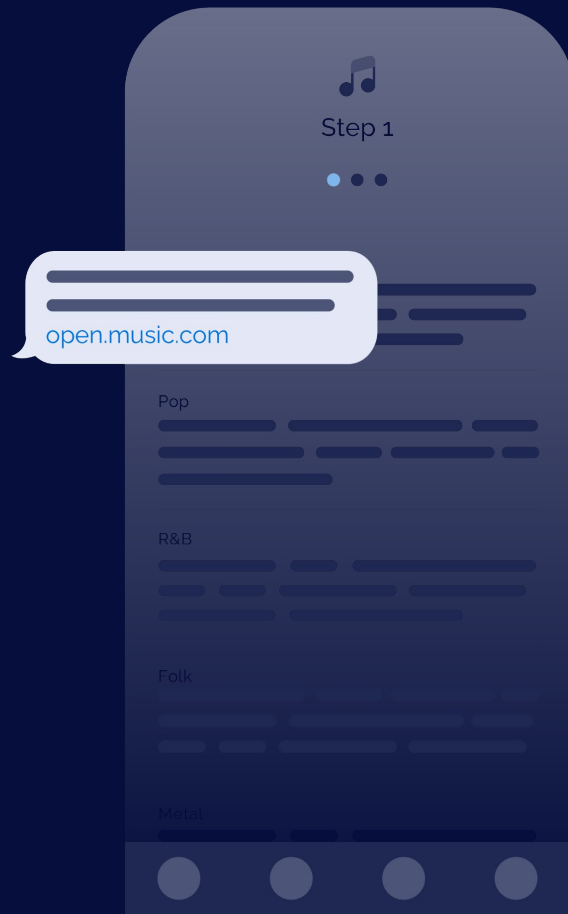


# Personalized onboarding

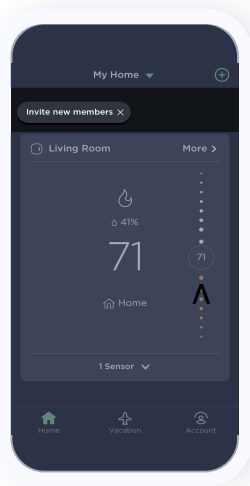
Provide a custom onboarding experience to increase app retention

How do you take users to that golden moment of conversion? Much rests on your onboarding process, which can determine whether a user stays or leaves. Making a good first impression on your user is critical; It takes just **50 milliseconds** for a user to form an opinion about a website — and an app isn't much different.

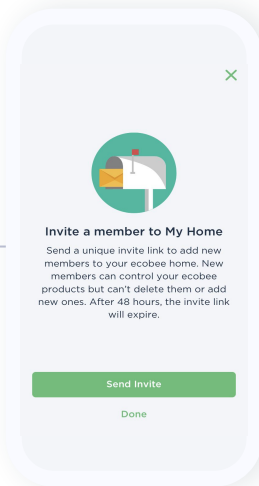
By carrying the context of wherever a person came from on the web into your app, you can create a profoundly personal first experience. Imagine someone shares an app with their friend via text, and the friend opens the app to a message, "Amanda recommended that you check out this song." That personalized greeting reduces the likelihood of dropoff and boosts the chances that they convert in the app.



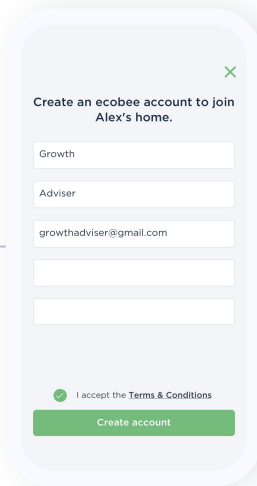
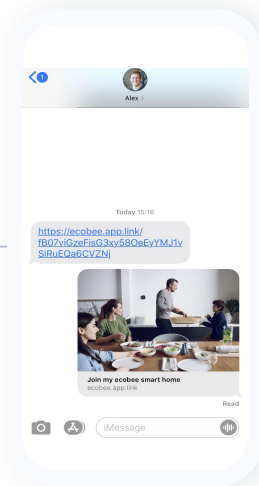
# Ecobee example



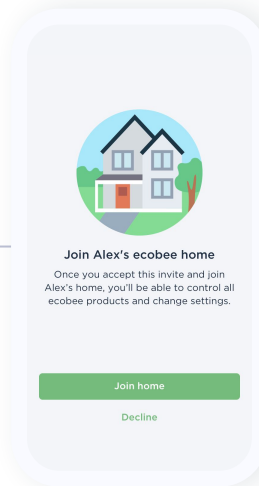
Clear CTA on main home screen to invite members



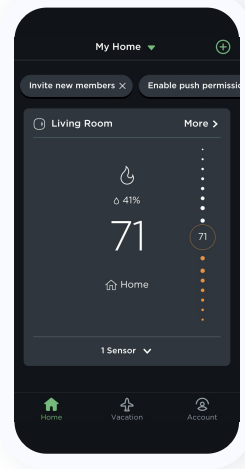
Clear description of benefits of inviting members to join



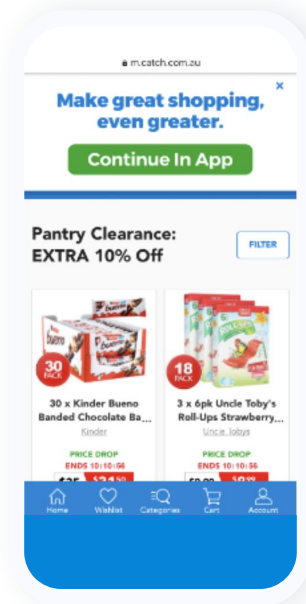
Personalized onboarding



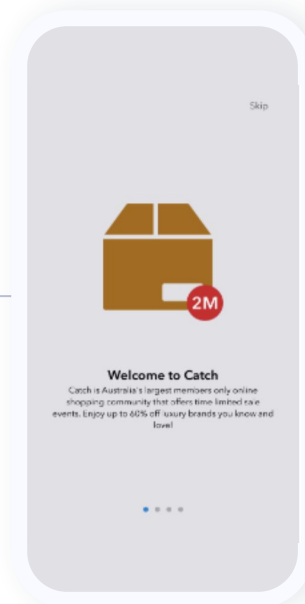
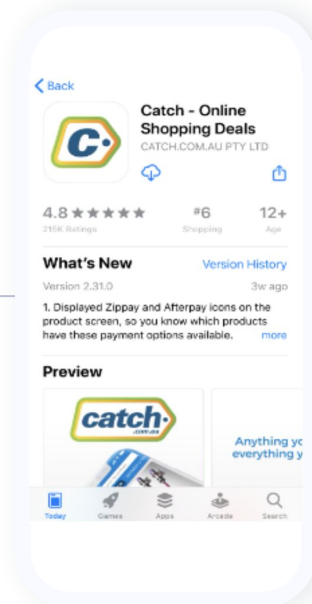
User can now control Ecobee products



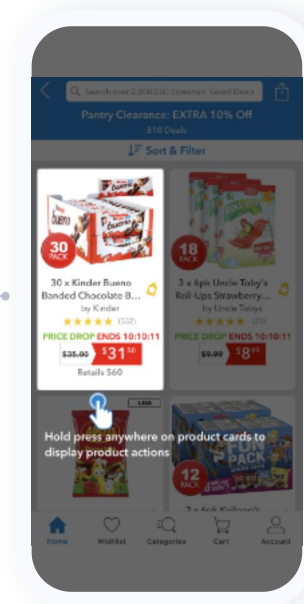
# Catch example



Third-page Journey banner targets customers that have visited the mweb 4 to 20 times within 14 days and do not have the app

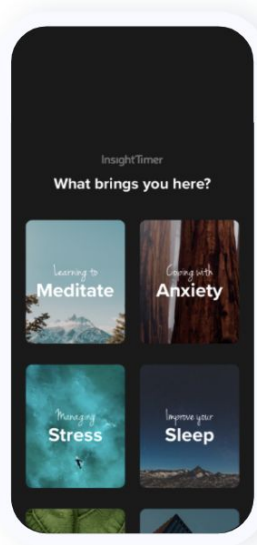
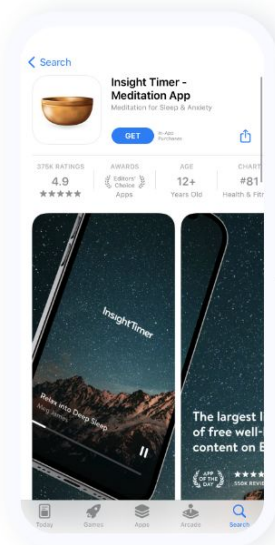


Upon download, the user is taken through the In-app onboarding experience

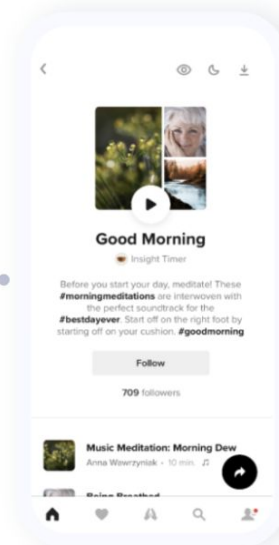


After the onboarding experience, the user is taken to same content in the app

# Insight Timer example



Upon download, the user is taken through the onboarding process to personalize their experience

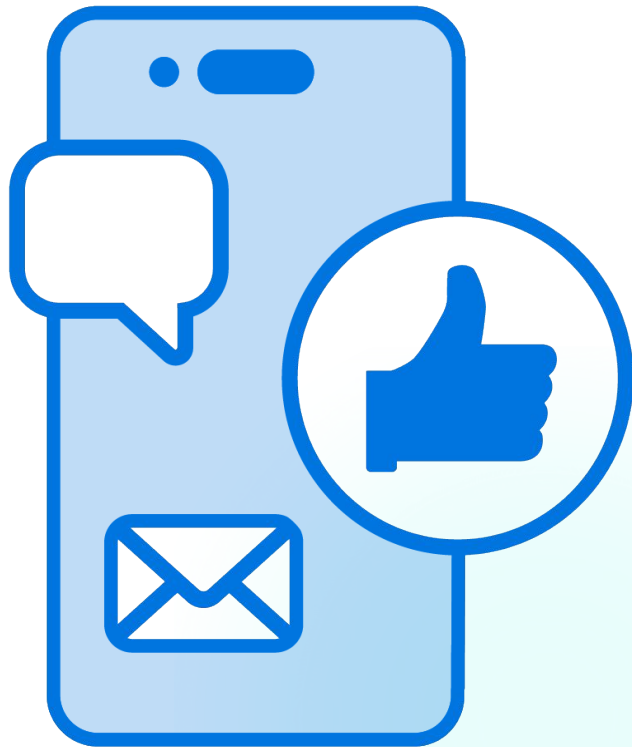


After the onboarding flow, the user is taken to the content that was shared by their friend

## Quick tips

- ✓ **Keep users informed**  
Minimize required steps while maximizing up-front value. Ask users more tailored preference questions and explain why and how the information you collect during onboarding will enhance their experience.
- ✓ **Curate the journey**  
Only show the features that are most important for users to get started. Gradually introduce additional features as users progress through the app, revealing functionalities relevant to their evolving needs at each stage of their journey
- ✓ **Show value up front**  
Remind users why they signed up. Include your value proposition during onboarding to reinforce why your app deserves their attention.

[Read the case study](#): User-curated music service 8tracks increased time active in the app by 200% and next-day returns by 90% with enhanced deep linking during onboarding.



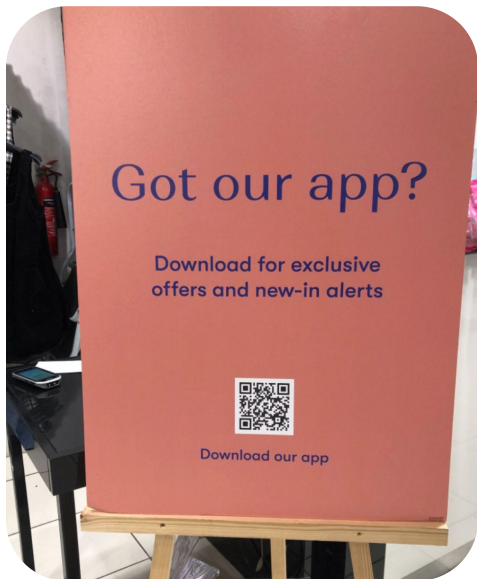
# Offline-to-app QR codes

Drive users into your app from the offline world

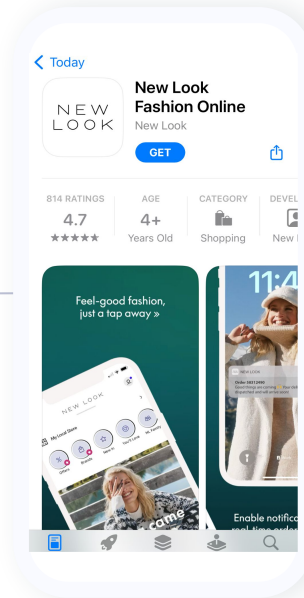
The explosion of QR codes shows no signs of slowing down. Their ease of use from an end-user perspective, ability to measure offline-to-online journeys, and effectiveness in converting existing offline users into your app— whether they're incorporated into a mailer, closing out an in-store brochure, printed on product packaging, or even on display in a store window — make QR codes a must in any marketer's growth strategy. Now is the perfect time to start or [expand your usage of QR codes](#) to scale user acquisition and engagement. By incorporating deep links into your QR codes, you get proper attribution and measurement data that drives better QR campaign performance and more personalized experiences.



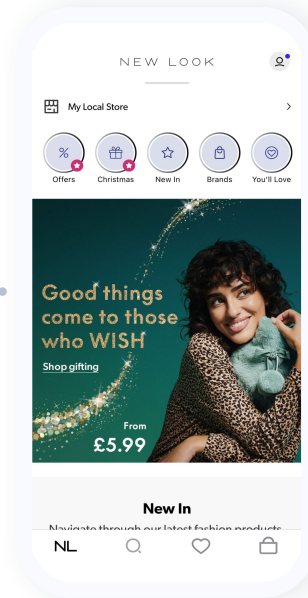
## New Look example



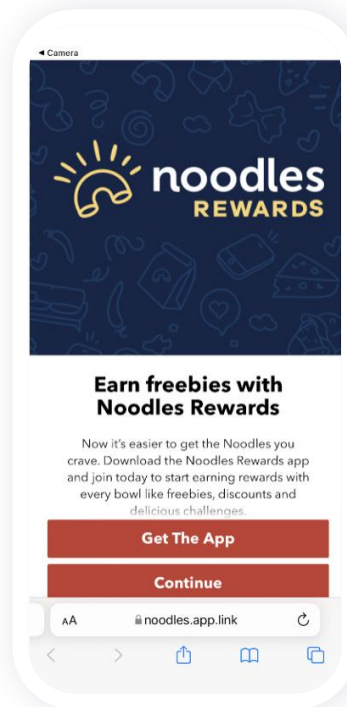
QR code backed  
by a Branch link



Upon scan, the user is taken  
to the App Store to  
download the app



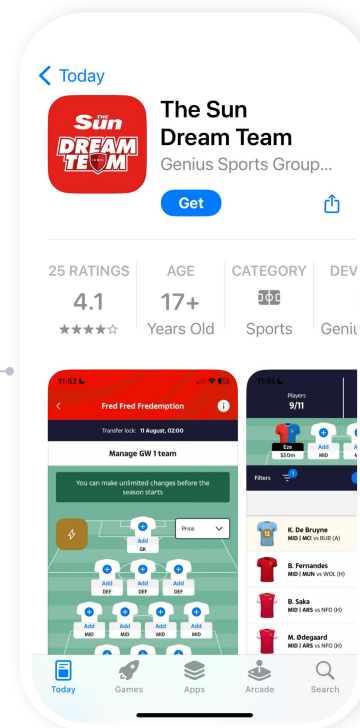
## Noodles & Company example



Branded QR code captures customers at their peak intent to promote loyalty rewards



# The Sun example



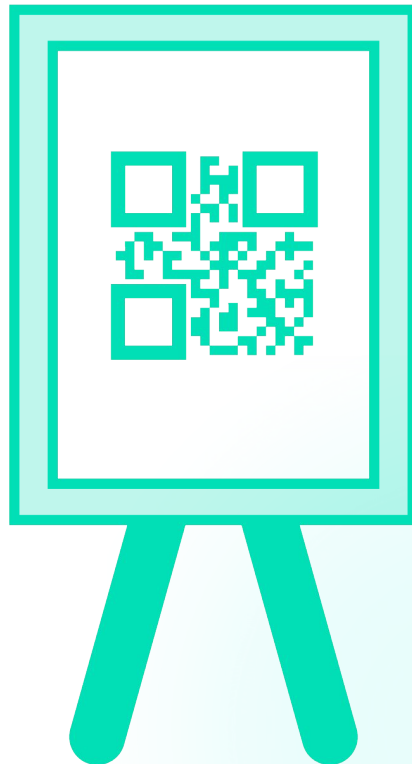
The Sun promotes its fantasy football Dream Team in newspapers with a QR code that leads directly to the app



## Quick tips

- ✓ **Always deep link**  
Prevent broken experiences and create cohesive user journeys with direct and deferred deep linking.
- ✓ **Have the option to update**  
Ensure your link and/or QR code generator can update link destinations after deployment to keep up with evolving campaigns.
- ✓ **Brand your QR codes**  
Customize and brand your QR codes to ensure that when users encounter them in the physical world, they immediately recognize them as originating from your brand, even out of context.
- ✓ **Get additional ROI**  
QR codes can be great for paid campaigns — and incorporating them into real estate you already pay for adds an additional layer of return on investment.

[Read the story](#): Planet Fitness saw a 36% increase in app MAUs with help of QR codes in its fitness centers.



# Desktop-to-app QR codes

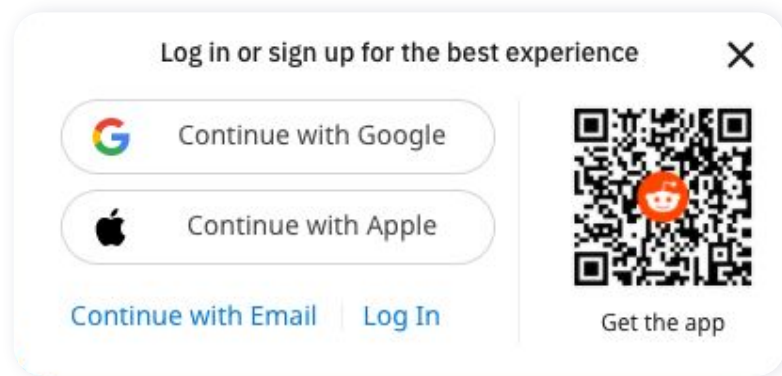
Move desktop users into your mobile app

In our increasingly digital world, you need to seize opportunities for brand affinity and connect with potential users across all touchpoints. With users already visiting your website, capitalize on this traffic by incorporating easy-to-create, cost-effective QR codes directly on web pages.

In the past, bridging the gap between desktop engagement and app downloads was challenging and often required multiple steps. But now, you can add a QR code to your desktop experience that eliminates unnecessary steps from the path to download and allows you to add nuance to your onboarding experience.

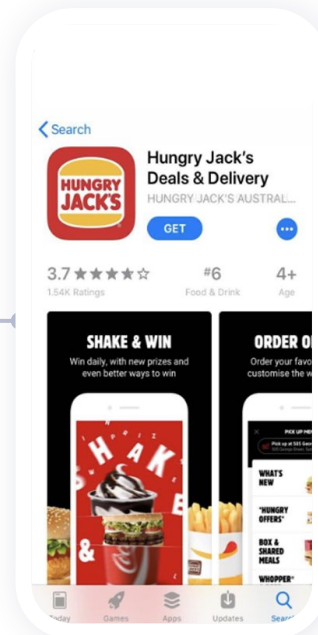
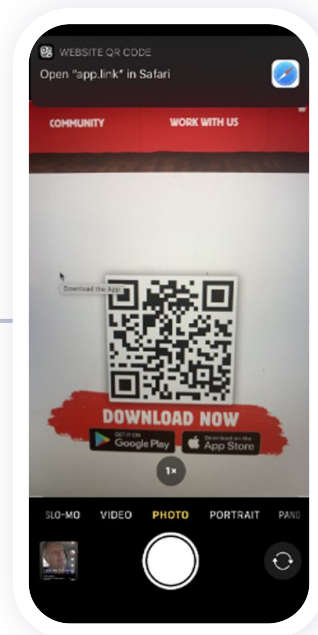
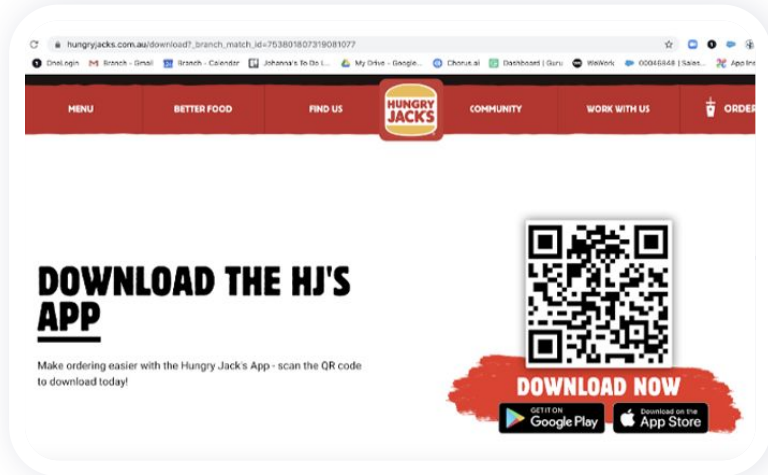


## Reddit example



A QR code on a website landing page makes it easy for users to get the app without interrupting the customer journey

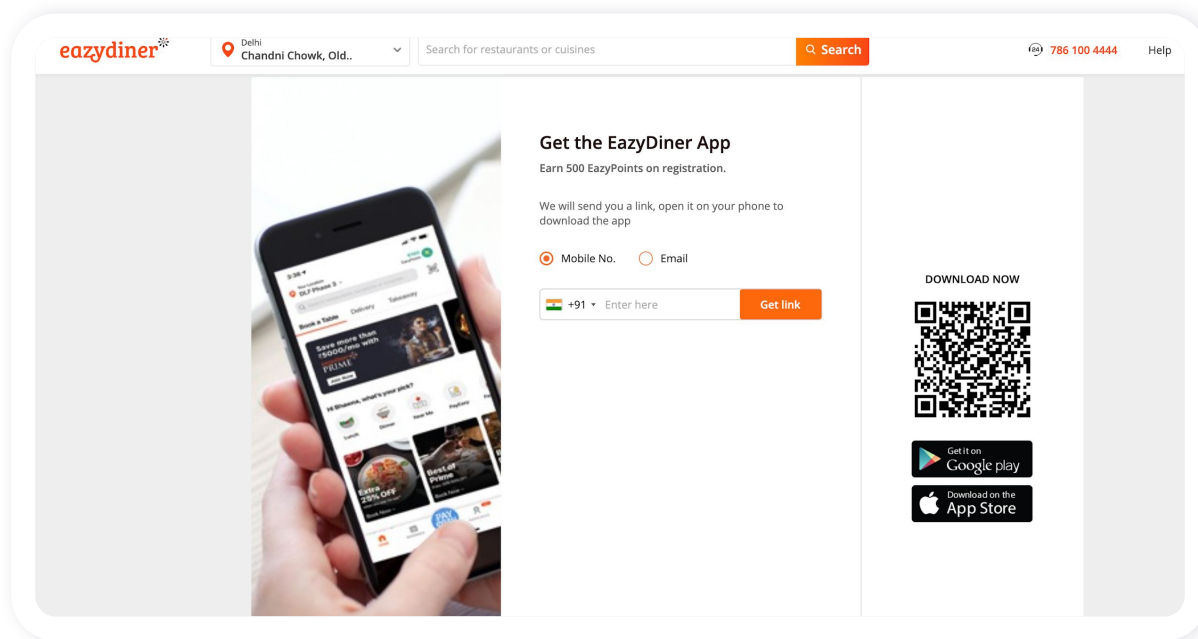
# Hungry Jack's example



After scanning a QR code,  
the user is taken to the  
App Store to download the  
app



# EazyDiner example



EazyDiner offers a QR code on its website for app download, along with text and email options for seamless installation. New users also receive incentives upon registration.

## Quick tips



### **Make it easy to update**

Ensure you can effortlessly update the link data behind your QR code as campaigns evolve.



### **Use deferred deep linking**

Be sure to use deferred deep links. This enables you to route a user to the in-app content they expect, even after install, and provides personalization opportunities that drive conversions and retention.



### **Optimize campaigns**

With attribution data for QR codes, you can understand and optimize the performance of your QR code campaigns by tracking opens, installs, and other downstream app events.

[Read the case study](#): 60% of QR code scans resulted in in-app sessions for leading a quick-service restaurant.

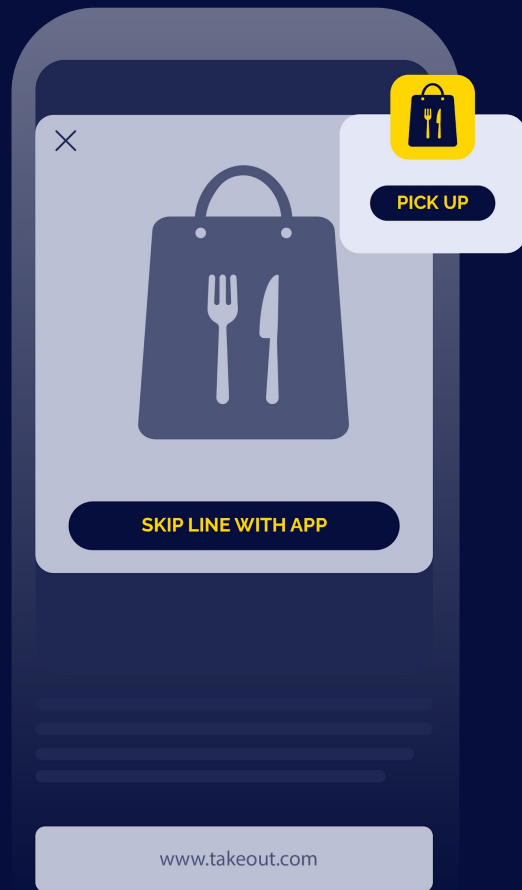


# mWeb-to-app smart banners

Convert web browsers into engaged app users

With 70% of digital time spent on mobile, it's evident that users are engaging with your brand on the mobile web. These users are prime targets for app conversion. Display a smart banner prompting them to download the app, and offer various incentives such as discounts on app purchases, loyalty rewards, or other app-specific benefits.

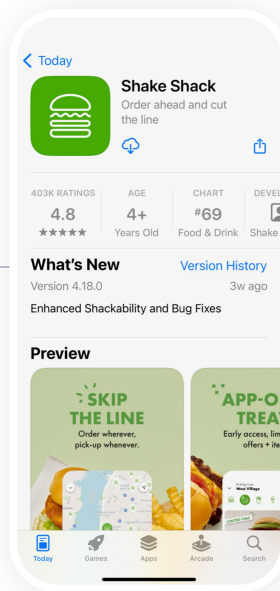
Personalize smart banners at scale based on user attributes to boost conversion rates. Thanks to their high customizability, precise targeting, and cost-effectiveness, smart banners can seamlessly integrate into every acquisition campaign.



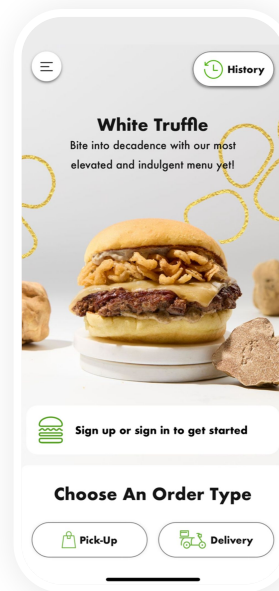
# Shake Shack example



Eye-catching creatives  
and CTAs

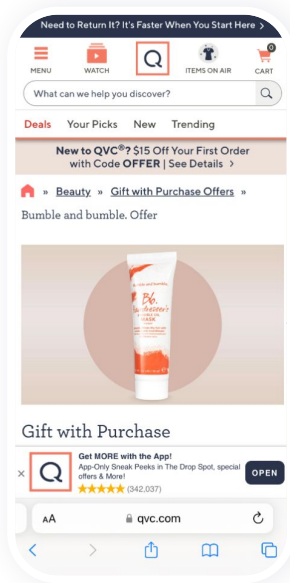


Takes the user directly to  
the App Store

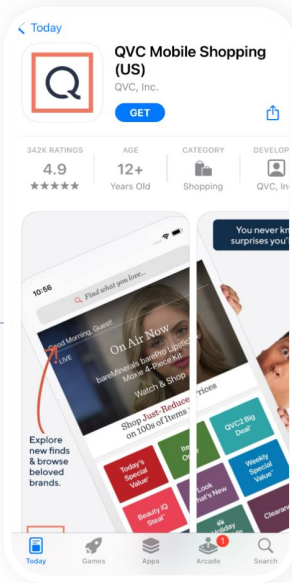


Opens to the corresponding  
page inside the app

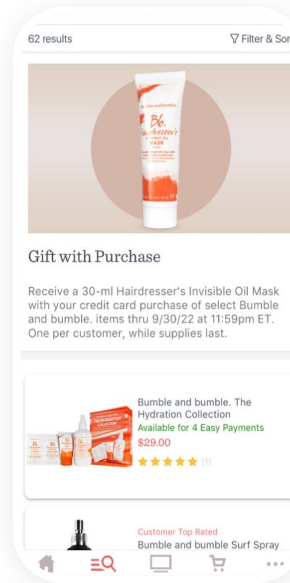
## QVC example



Small banner showcases the benefits of downloading the app



Open button takes the user directly to the App Store



Opens to the corresponding offer page inside the app

## Quick tips



### Customize based on intent

Customize banners to account for the context of where users come from and their previous behavior. Users who find your website through SEO are in a different mindframe than those referred by friends.



### Create smart CTAs

Create calls to action that convey how the app is the next logical step, like “track your purchase in the app” or “download the app to get the most out of your subscription.” This provides continuity and outsized results in getting users to understand the value in downloading in the moment.



### Be mindful of the customer journey

Reserve larger banners for users acquired from email or social media, while opting for smaller banners or just a button for organic searches on your mobile website.

[Read the case study](#): Payoneer drove 204K installs with Journeys smart banners.

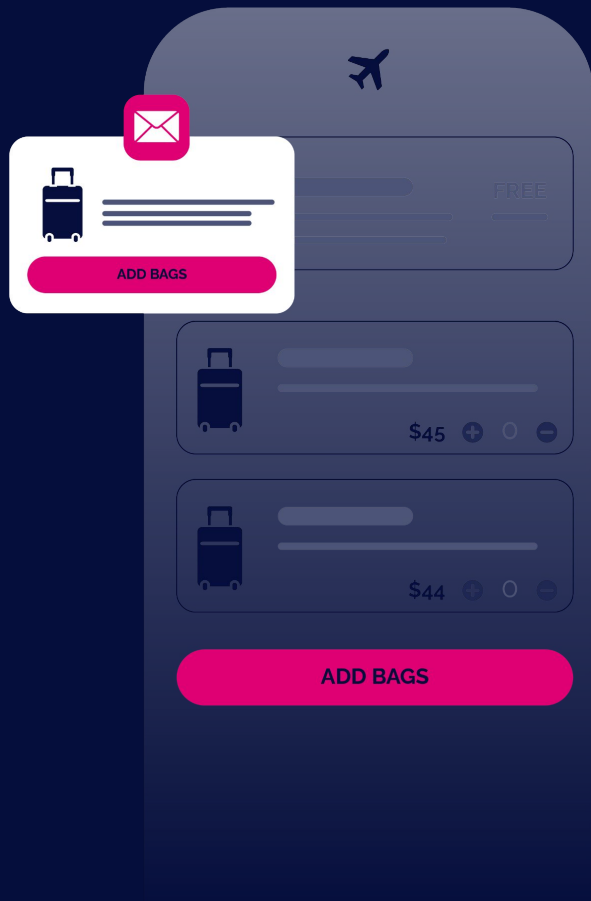


# Email to app

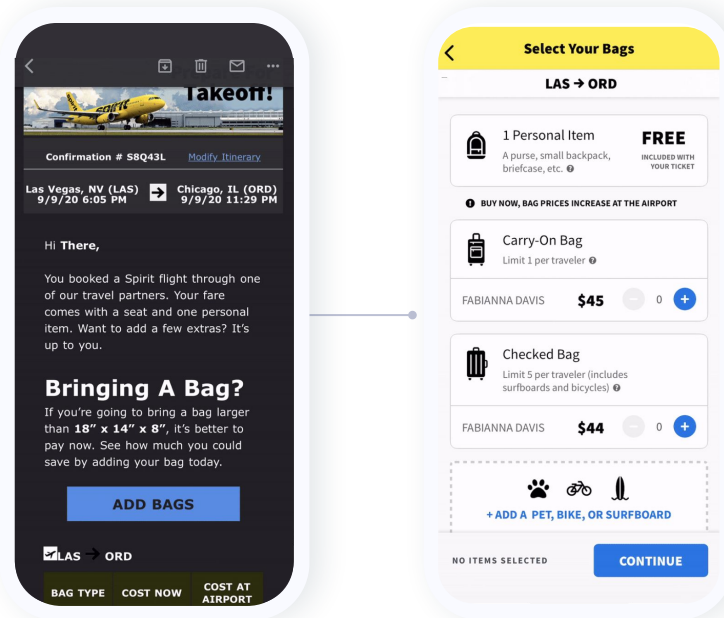
Provide a pathway to download your app from email

Did you know that about **70%** of emails are opened on mobile? That's a huge opportunity to turn already highly-qualified email subscribers into app users and gain a deeper understanding of post-click user behavior. But there is a disconnect between email and mobile apps that impacts the user experience and your ability to track clicks, especially on iOS.

To counter this, most successful email campaigns with high conversion rates use deep links throughout their emails, including in the copy, images, and CTAs. This approach is particularly as it allows for quick redirection to your app — without losing user interest, the curiosity of your offer, or the intent to purchase.



## Spirit example

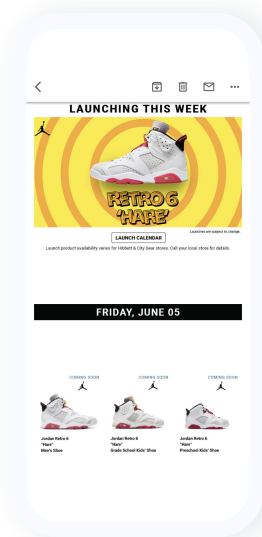


CTA button within the body of the email is deep linked

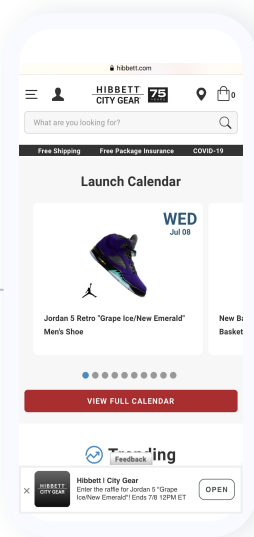


Seamlessly opens to the correct page inside the app to add bags

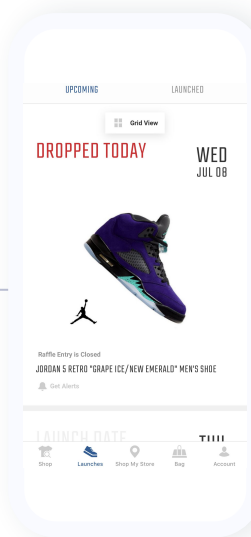
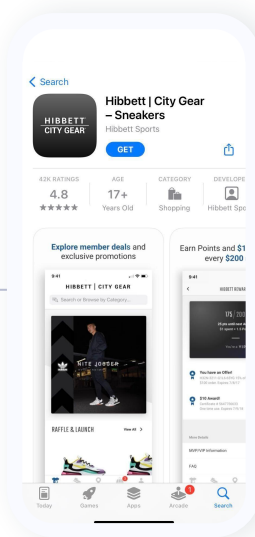
# Hibbett | City Gear example



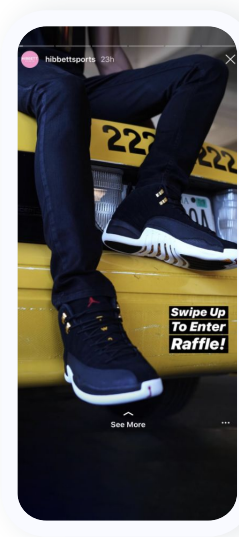
Email from Hibbett | City Gear directs that to the website



Upon clicking on the Journey banner, the user is redirected to the App Store where they can download the app



The click is preserved through install, creating a seamless experience for the end user



Post acquisition: Hibbett | City Gear uses the same links to keep users updated across social, SMS, and email

## Quick tips



### Use deferred deep links

Prompt users to download your app via email using banners, footers, dedicated welcome emails, etc. Then, route them to related content in the app via a deferred deep link.



### Personalize the experience

Tailor calls to action in emails based on whether the user has your app already. For users without the app, present a CTA such as "Get the app." For existing users, deep link them directly to an in-app onboarding experience that explains the value of your app.



### Try in-app-only offers

Promote in-app-only offers, discounts, or loyalty rewards in emails to entice users back into the app.

[Read the case study](#): Ancestry® achieved a nearly 3x increase in engagement with the app features highlighted in its deep-linked email campaigns.

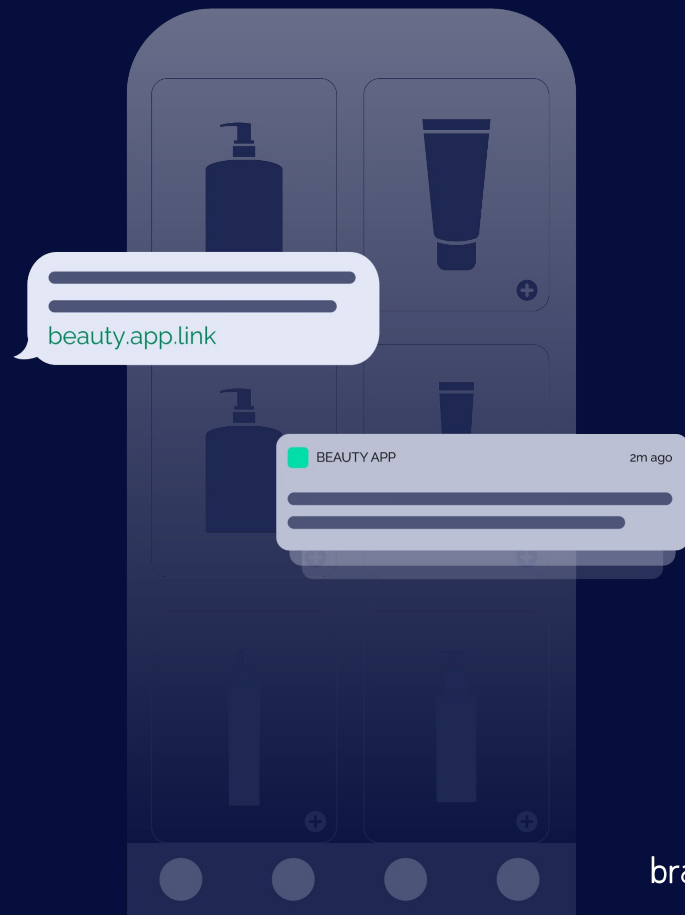


# SMS and push notifications to app

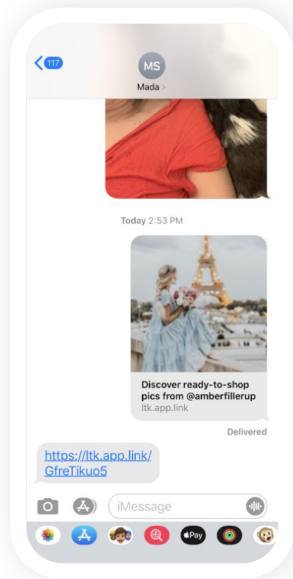
Reengage users with tailored and timely messages

Perhaps more than any other customer experience, SMS and push notifications allow brands to communicate directly with users and provide extremely personalized, contextually relevant messages. Because these users have already downloaded your app, and you know how often they interact with it, brands have deep insights into how to best use this method of engagement.

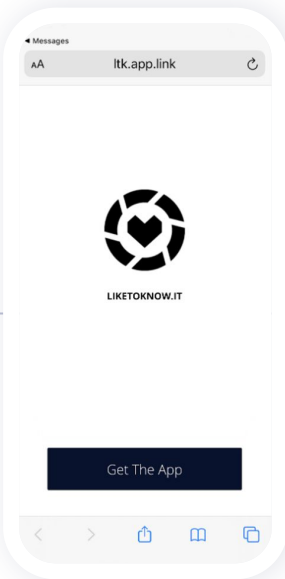
Be careful not to overwhelm your users with texts and notifications. The average U.S. smartphone user gets **46** push notifications per day, and just **one** weekly push notification leads 10% of users to disable notifications and 6% to uninstall the app entirely. The good news, though, is that it's relatively easy to ensure this method works — and it's personalization. Push notification personalization improves reaction rates by **400%**.



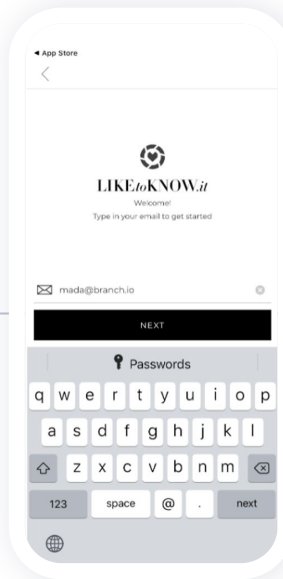
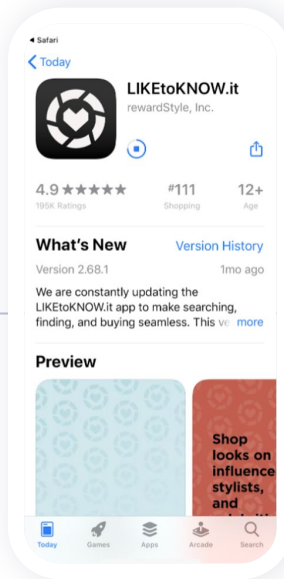
## RewardStyle example



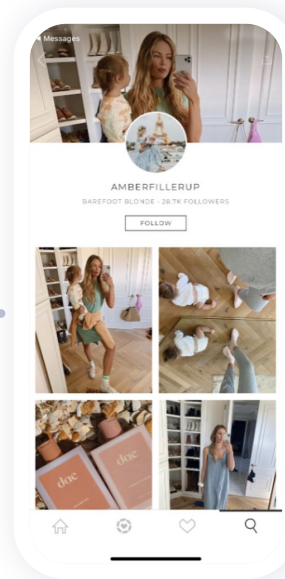
Influencer shares link on SMS



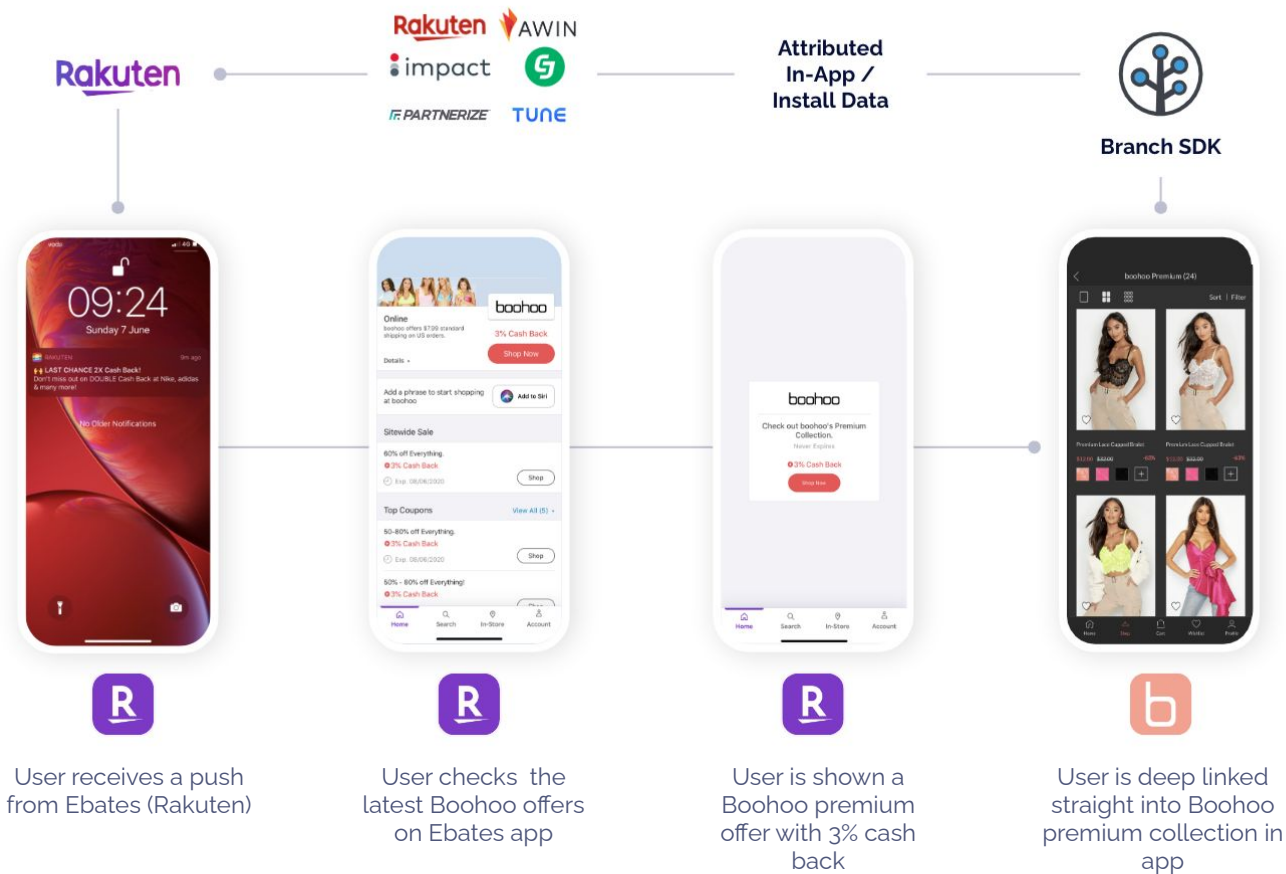
User is taken to the App Deepview



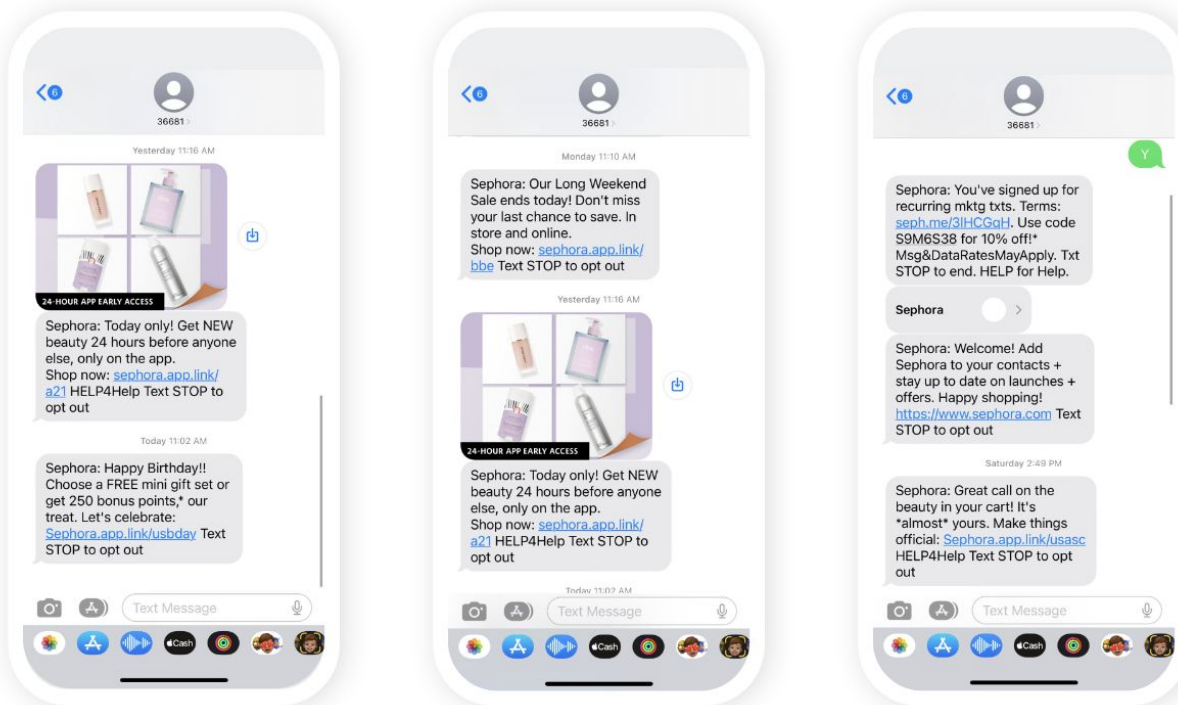
Simple banner converts web visitors to loyal app users



## Rakuten + Boohoo example



## Sephora example



Personalized, targeted text messages based on user behavior and shared demographic data deep link directly to relevant content within the app

## Quick tips



### **Don't overload users**

It might be tempting to connect with users as often as possible, but texts and push notifications annoy users when sent too often. Be mindful of what and when you send, and make sure they always offer some type of personalized value or education.



### **Employ A/B testing**

One size never fits all, so experiment with different messages, times of day, creative, and content — and be sure to measure results so you know what works best.

### **Provide an easy way to opt out**



Privacy matters to consumers, and they expect the ability to dictate their digital experiences. Make sure users have an easy way to opt out of messages.

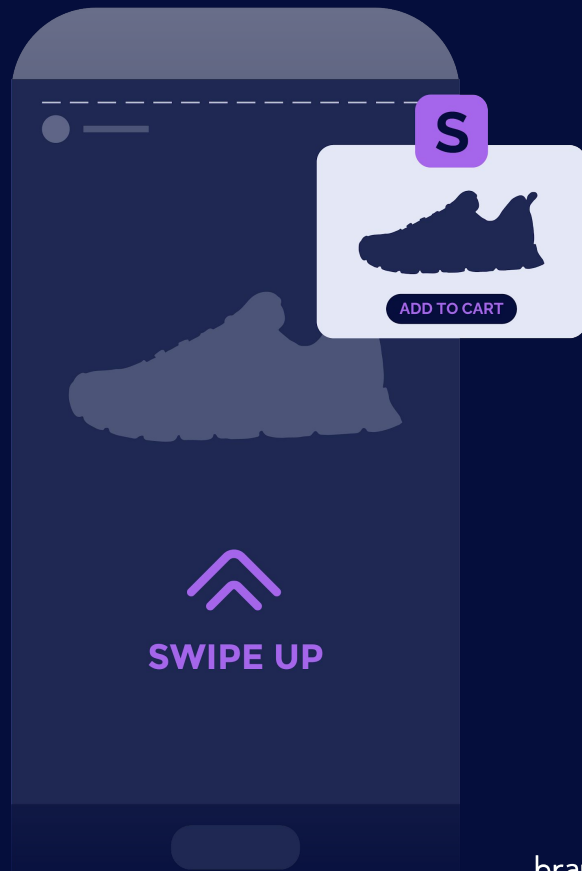


# Social media to app

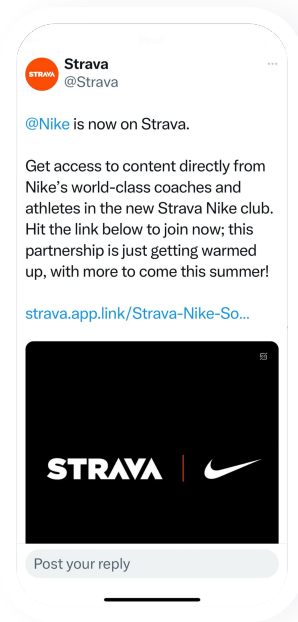
Bring users into your app from organic social

Social users have already shown an affinity for your brand, but many of them get stuck in walled gardens like Facebook, Instagram, Snapchat, and LinkedIn. These platforms have **in-app internet browsers** that are designed to keep users in their apps longer, which means you miss opportunities to acquire and engage high-value users in your app.

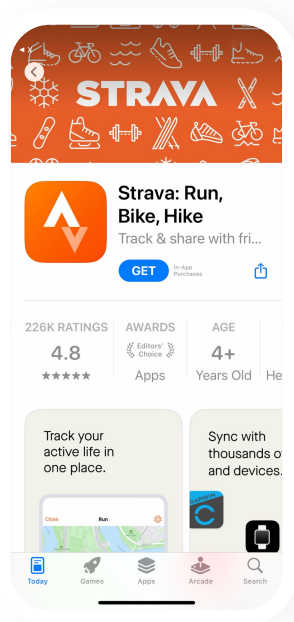
With deep links, you can bypass the walled gardens and direct users directly to your app. Deep links not only ensure seamless user experiences, they also provide full attribution and analytics across every channel, so you can measure how each social media campaign really performed.



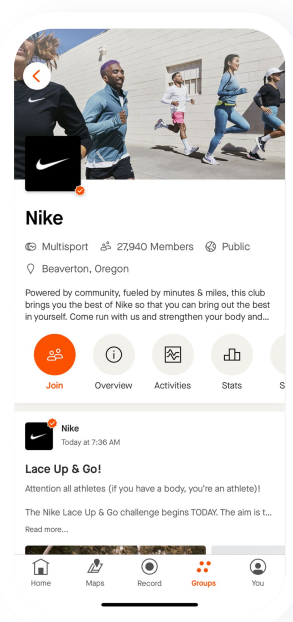
# Strava example



Strava uses a deep link in a tweet on X



The deep link directs to the App Store to download the app

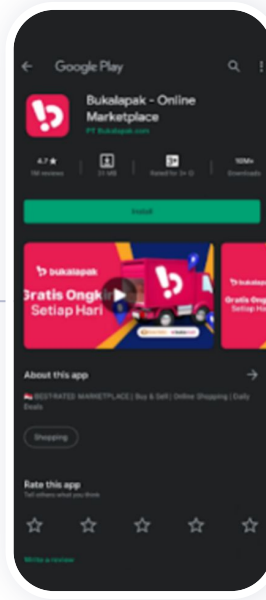


After install, the corresponding content automatically opens

## Bukalapak example



Bukalapak uses a deep link in an Instagram story



The deep link goes directly to the Play Store to download the app



After install, the original offer from Instagram automatically opens

## Quick tips



### Free users with deep links

Create and deploy deep links in organic social campaigns.



### Increase revenue with better experiences

Bring users from a walled garden to the exact content they desire in your app with deep links. A superior experience like this increases revenue, loyalty, and LTV.



### Plan the user journey

Wireframe your user journey ahead of time to ensure no visual snags appear while users engage with your links.

**Read the story:** Jersey Mike's saw a 43% increase in app installs during the Month of Giving when using deep links to break out of walled gardens.

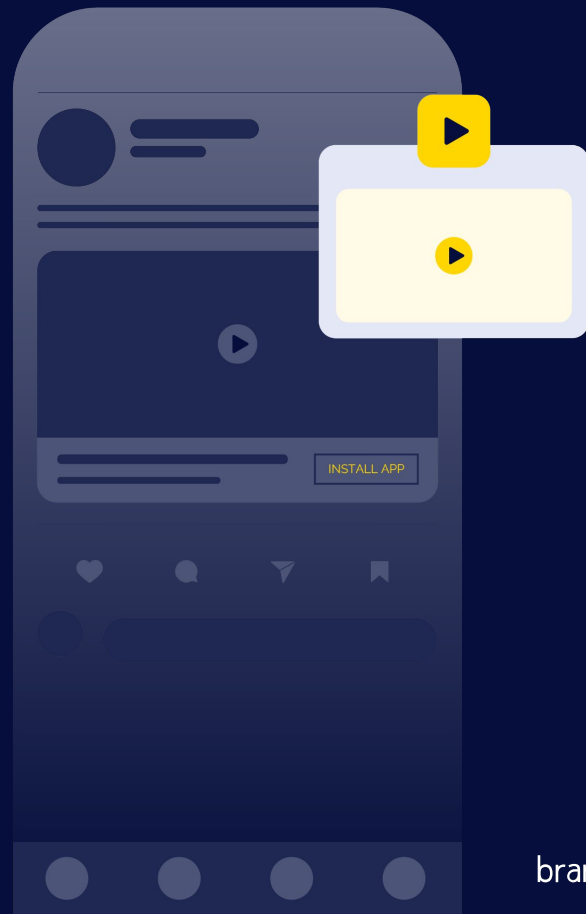


# Deep linking in mobile ad campaigns

Route existing users to app content from paid campaigns

Many brands rely on paid ads to reengage their audiences because paid media reliably broadens a brand's reach at every stage in the funnel, from awareness to conversion to winback.

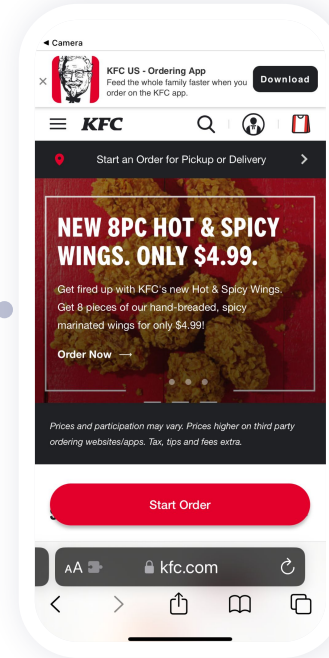
Retargeting is another way to engage users who have already downloaded your app. Many networks support showing retargeting ads to custom user segments based on time since last engagement. To optimize your CPA, make sure that ad placements take users with the app directly to advertised products and content. Deep linking users will optimize reengagement spend and keep your existing users coming back.



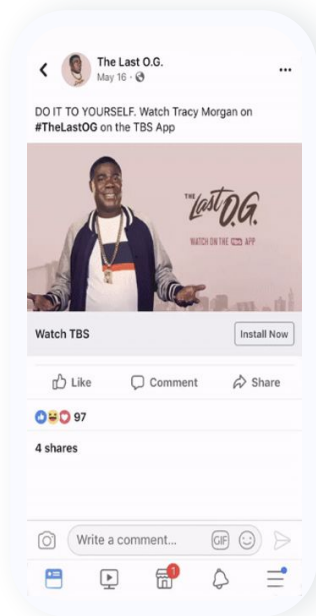
## KFC example



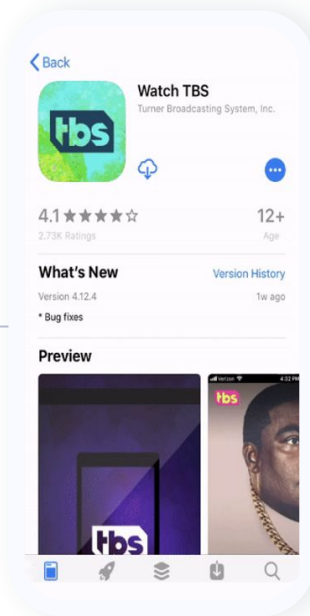
TV ad with QR code display to  
download the app



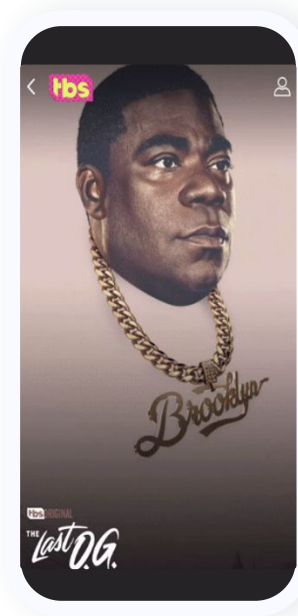
## TBS TNT example



Facebook ad is deep linked  
to the show page



The link opens the TBS app  
page in the App Store



After install, the show  
page automatically  
opens

## Quick tips



### **Better understand user behavior**

Capture attribution data to help you understand the user's path to conversion, even when it's long and complex.



### **Retarget lapsed users**

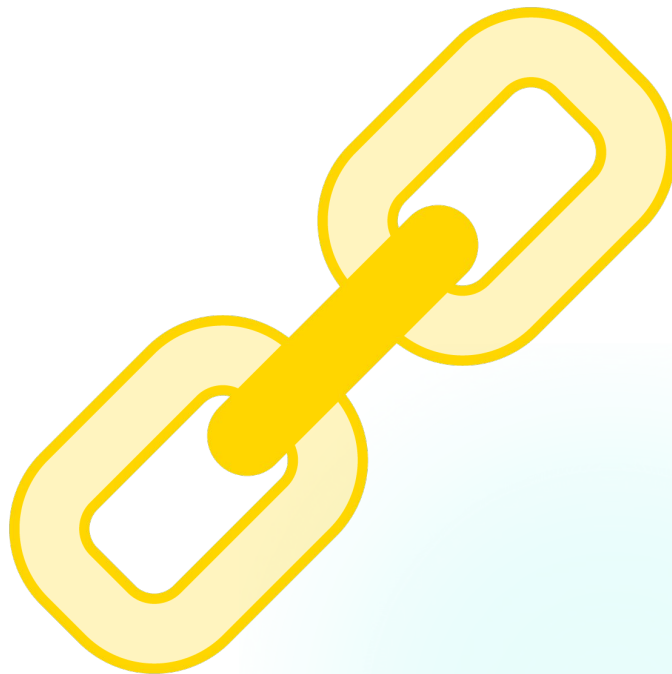
Test retargeting ads specifically with lapsed user segments.



### **Deep link to compelling content**

Reengage users with ads that link directly to compelling content in the app instead of sending users who already have the app to an app store.

[Read the case study](#): Leading rebate app Checkout 51 drove a 10% increase in conversion rates and a 93% click-to-open rate by deep linking their ads.

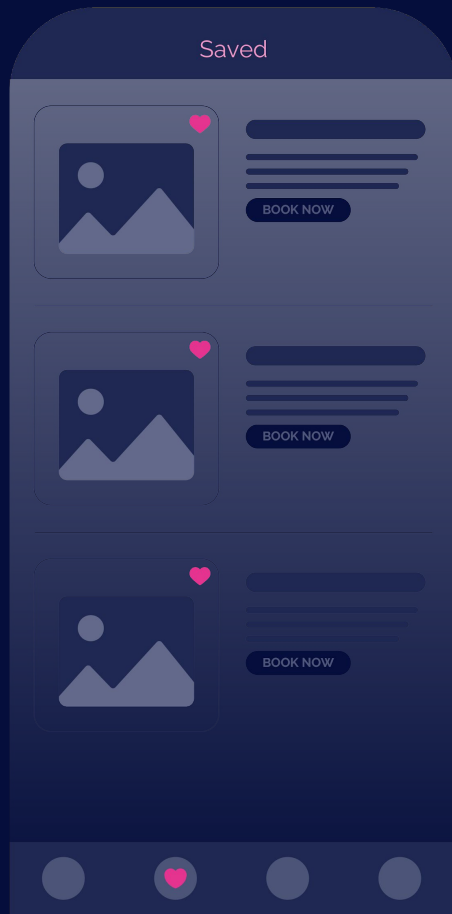


# In-app-only experiences

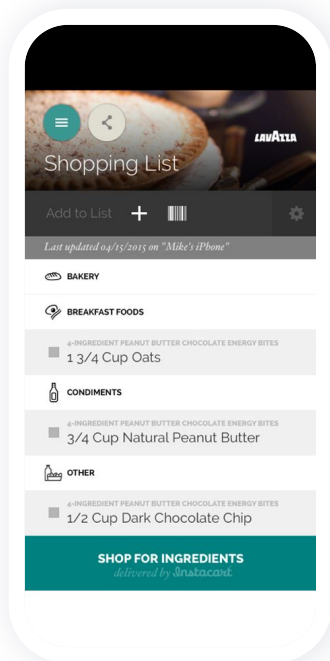
Drive users to app for enhanced functionality

Offering in-app-only experiences can entice users to try out new features or take advantage of exclusive app-only coupons or rewards. Enhanced functionality not only raises curiosity, it also makes the app experience worth coming back for.

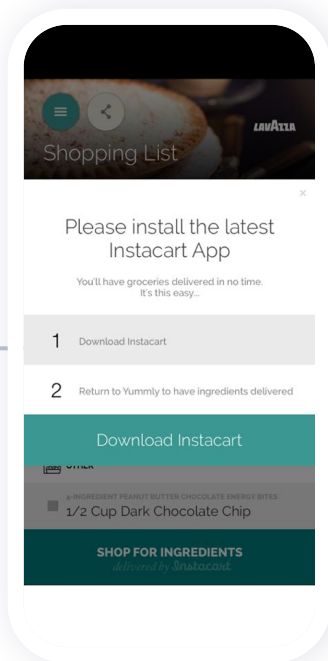
Be thoughtful about how users will learn about enhancements and access the app to experience them. Deep links ensure that promotions have accurate attribution and guide users directly to the intended experience within the app. They are instrumental in driving cross-platform user engagement and create a better overall user experience for your app users.



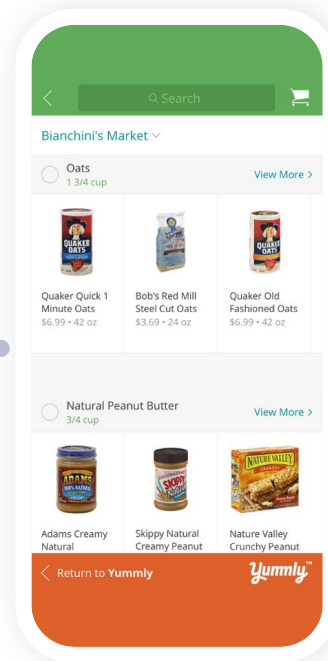
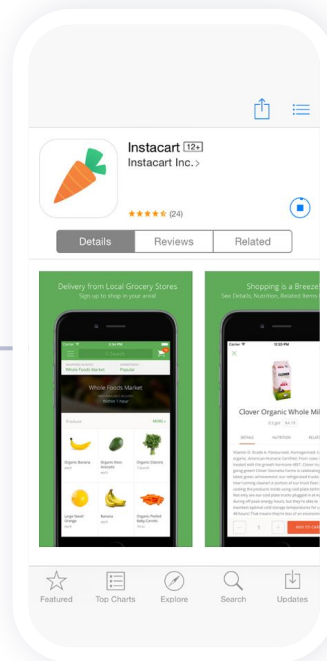
# Instacart example



User can place Instacart order from Yummly app

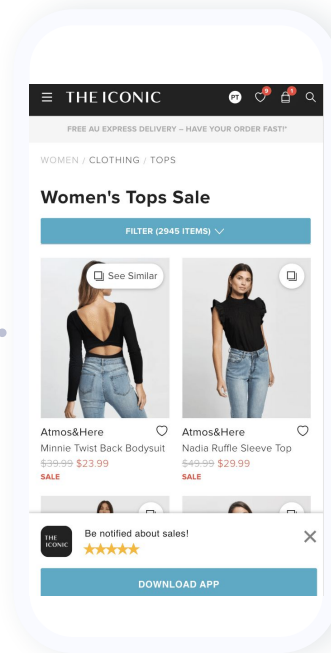
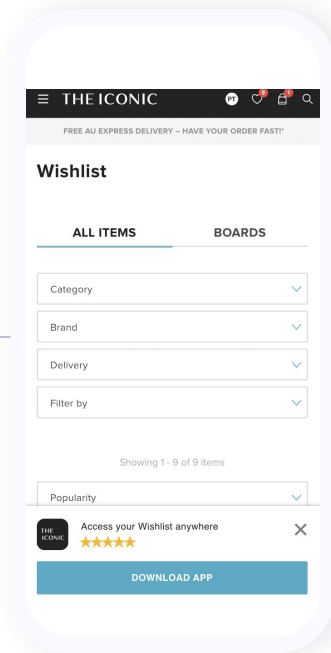
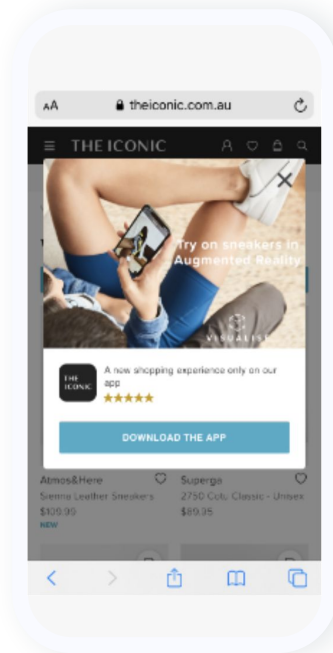


If Instacart is not installed, user is prompted



After install, deferred deep link auto-fills cart

## THE ICONIC example



## Quick tips



### **Deep link directly to new experiences**

Use deep links to enhance functionality within the app and promote to existing users through social media, email, smart banners, etc.



### **Promote features with smart banners**

Try mobile website banners to highlight app-only capabilities, such as a sneaker-try-on augmented reality feature.



### **Diversify content**

It doesn't have to be limited to experiences; You can also promote in-app discounts, offers, loyalty rewards, etc. as an incentive to reengage with an app.

[Read the case study](#): How retailer THE ICONIC built a best-in-class user experience to supercharge growth across platforms.

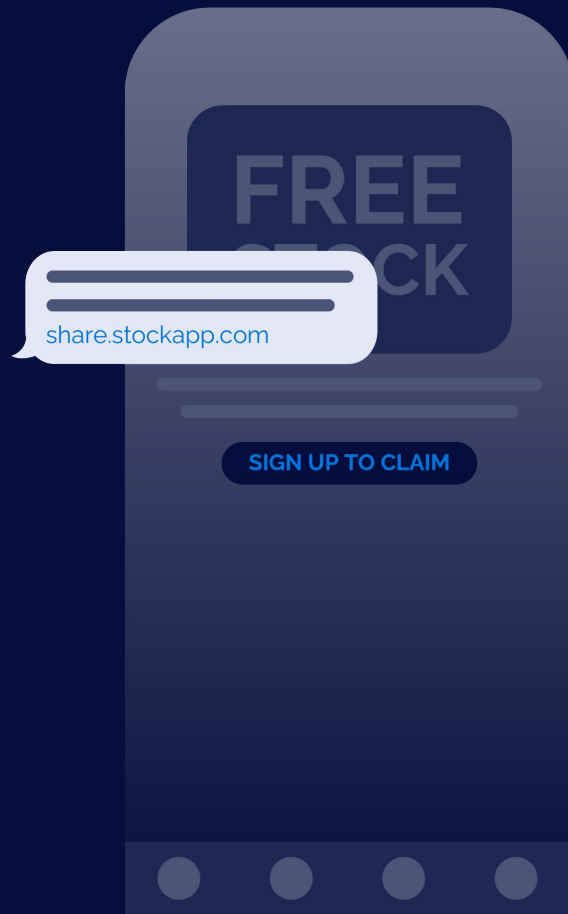


# Referrals

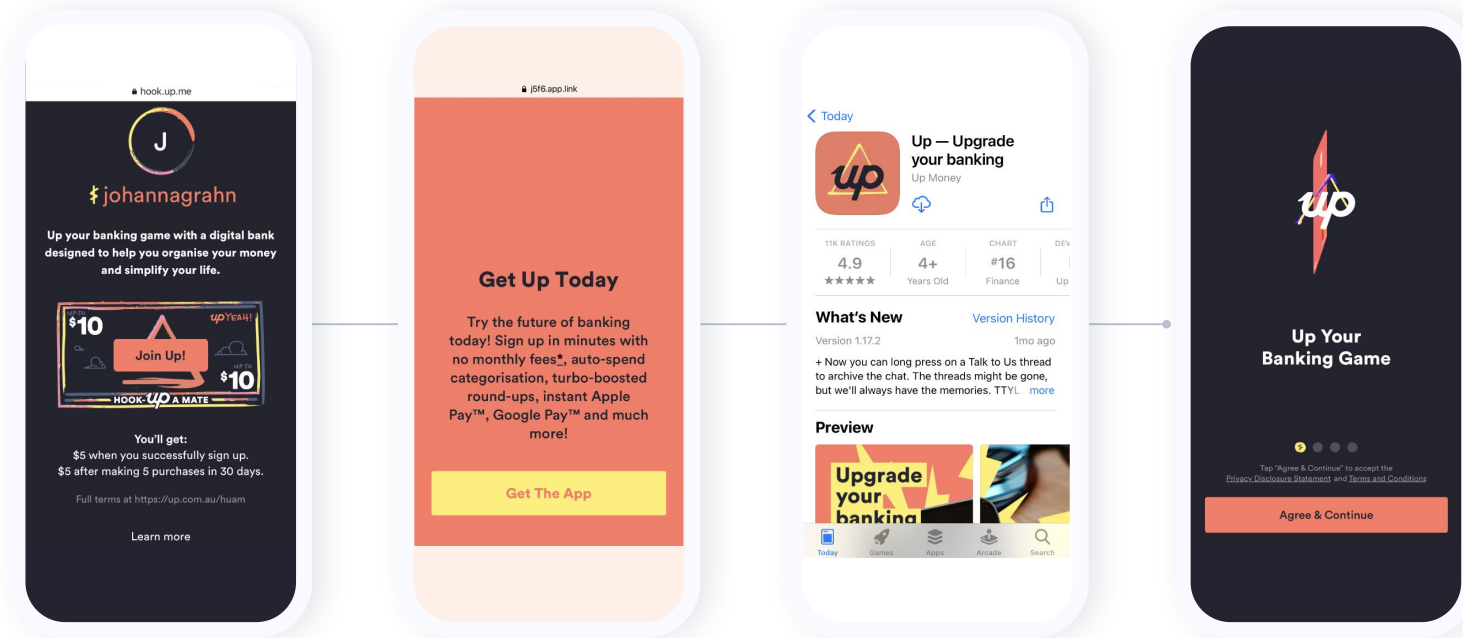
Monetize existing users, promote acquisition, drive reengagement, and organically generate social proof

A referral program rewards users for promoting a product or feature to others. The referral is usually sent by text, email, or social messaging, and the “referring user” generally receives a reward for actions like sign ups, downloads, or buying a product.

A [successful mobile referral program](#) hinges on accurate matching and attribution to credit the correct referring users, as well as connecting the dots to see which users are referring others. By tracking analytics on referral links, you can keep track of referrals, offer appropriate incentives, and close the loop with the individuals who made referrals.

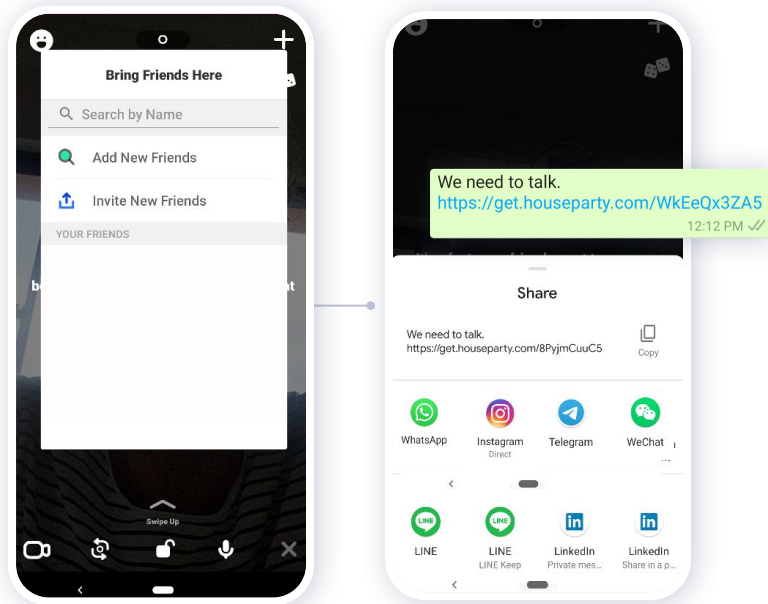


# Up example

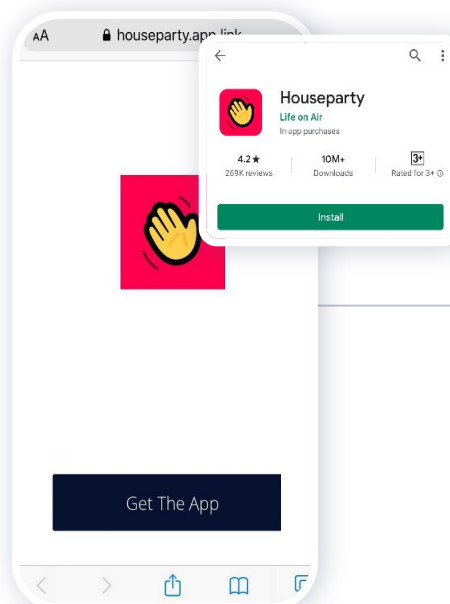


Up Banking provides incentives to users who sign up and make a purchase in the first 30 days and uses deep links to make installing the app simple and smooth

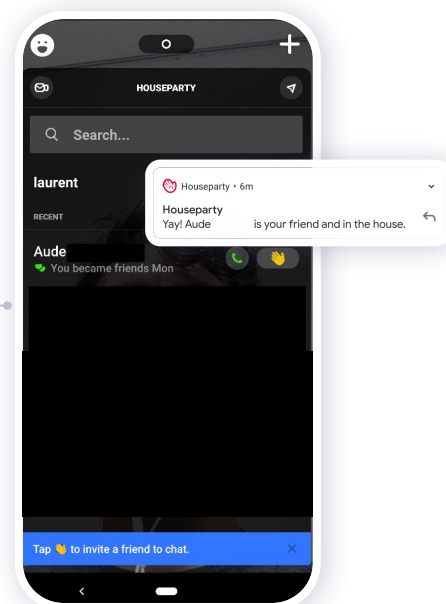
# Houseparty example



User shares deep link

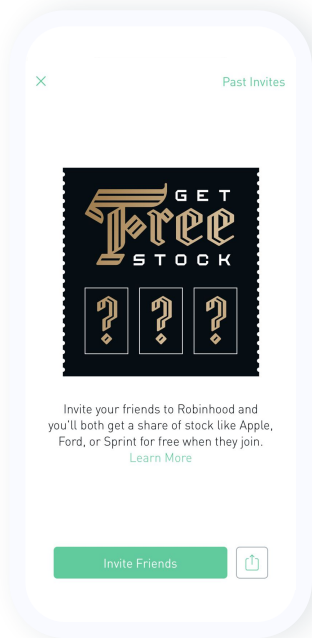


Referred user is taken to the app store to download the app

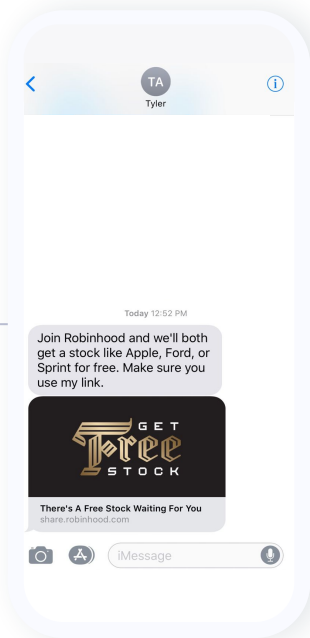


App connects user with the friend who shared the link

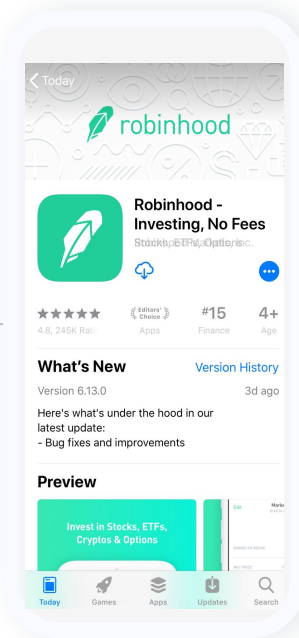
# Robinhood example



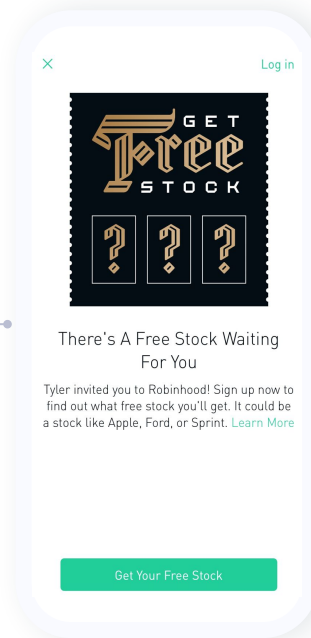
Referrals are incentivized and don't require manual promo codes



The Invite Friends button opens a pre-populated text message



The text has a deep link to the App Store

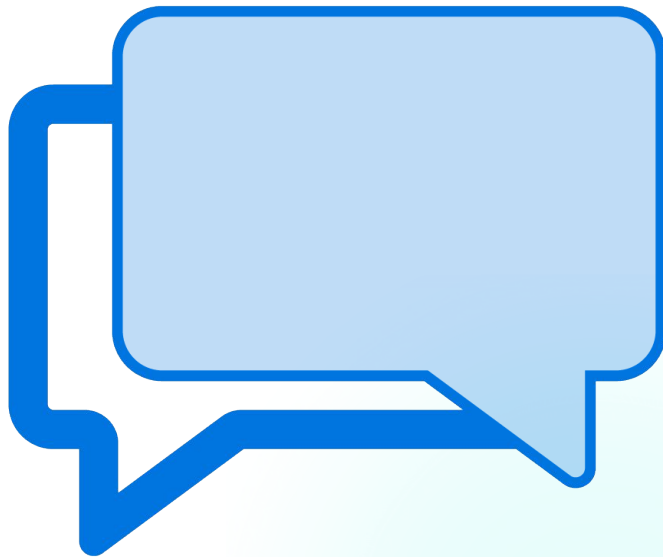


The new user can go through a personalized onboarding process before being taken directly to the referral offer

## Quick tips

- ✓ **Choose the right program for your brand**  
A friend-to-friend referral program rewards referring users with a bonus once the referred user downloads the app, while influencer referral programs extend your reach by sharing your app with larger audiences, but you generally have to pay for them. Brand-driven programs incentivize growth by offering exclusive rewards for downloading and using the app.
- ✓ **Guarantee reliable attribution**  
Identify and properly track clicks, installs, opens, and reengagement to understand the performance of your mobile referrals. Only reliable attribution helps you understand which users are referring others, and which shared content drives the highest number of installs and engagements.
- ✓ **Show the referrer's name**  
Create shortcuts to trust by showing the name of the referrer and taking users straight to the content they want.

[Read the case study](#): A robust referral program helped marketplace app Rappi drive over 50 million total app installs.

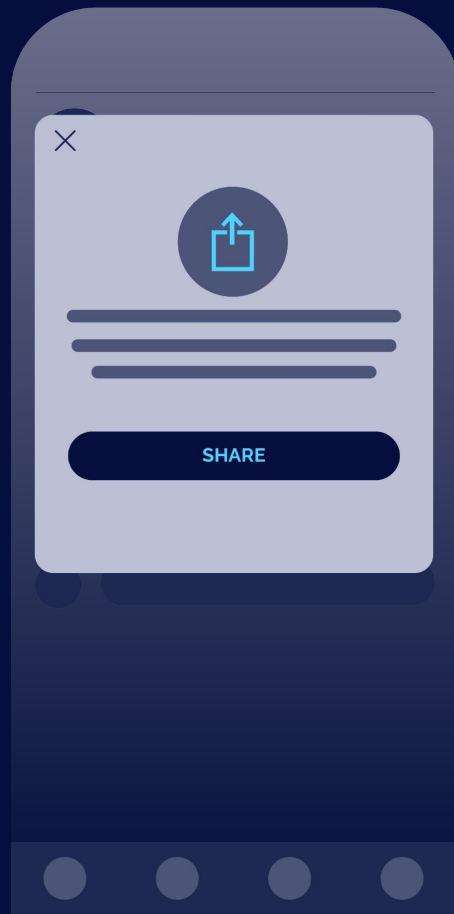


# Content sharing

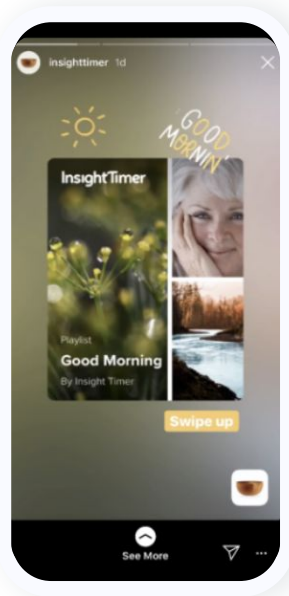
Encourage existing users to promote the app to their network

An effective way to grow your userbase is to encourage existing users to share your content with their friends and followers. Unlike referrals, brands don't necessarily need to incentivize content sharing or launch a full-fledged program. Content sharing often happens organically without prodding from a brand.

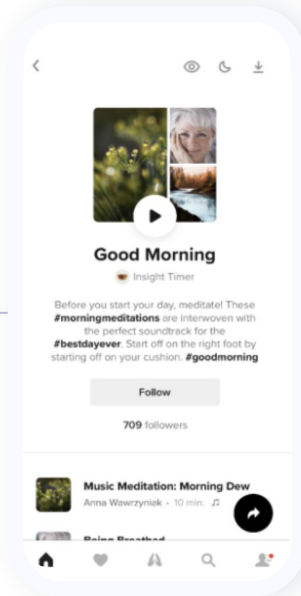
However, experience still matters. The modern mobile user expects mobile links to take them frictionlessly into apps, and preserve their context from the initial link click, just like on desktop web.



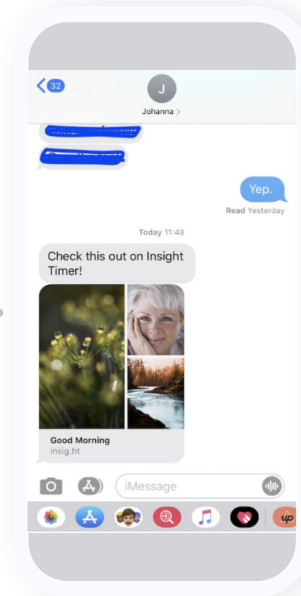
## Insight Timer example



Instagram stories  
contain Quick Links to  
the app

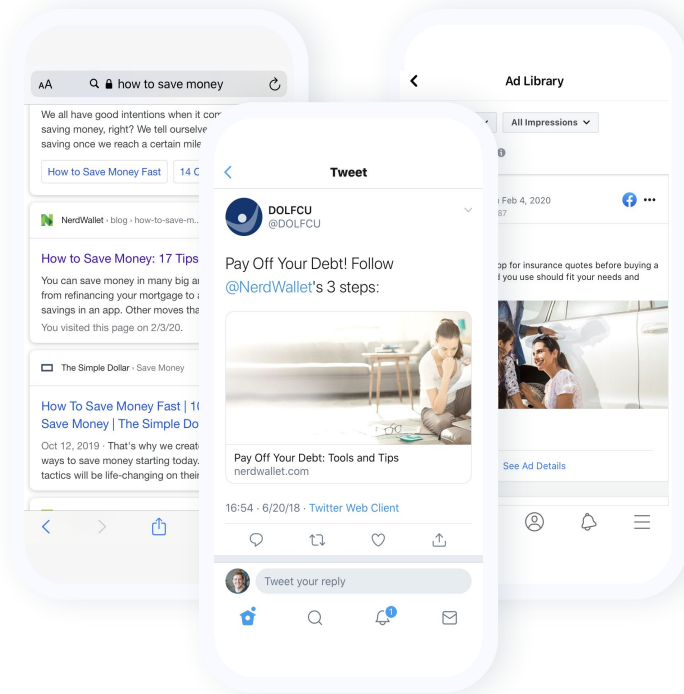


If the user has the app, they are  
taken to the app where they can  
share content with friends via  
Quick Links

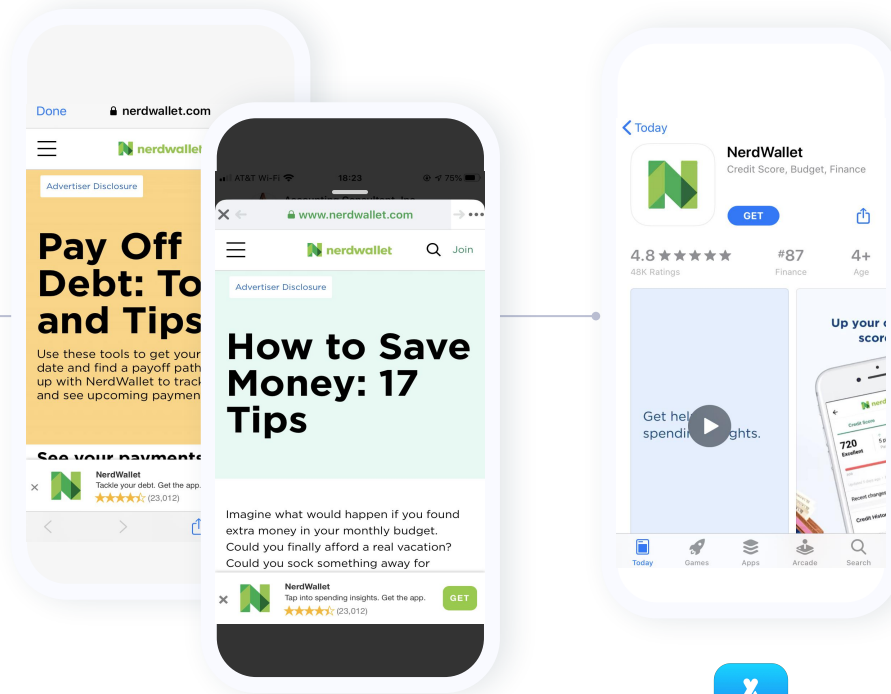


Users share content  
through SMS, email, or  
social media

# NerdWallet example



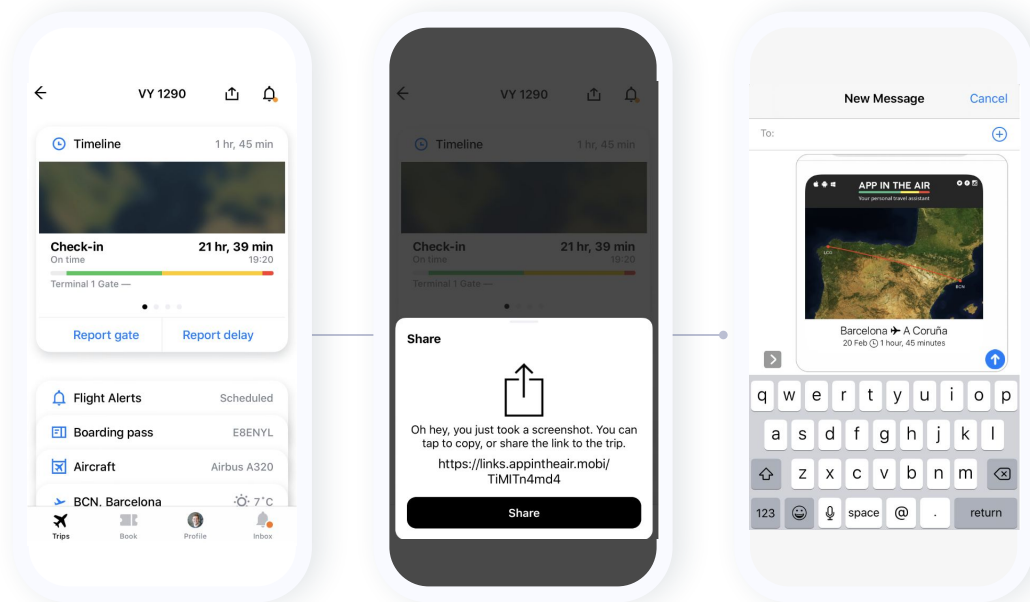
Content appears in a variety of channels



Personalized smart banners on content



# App in the Air example



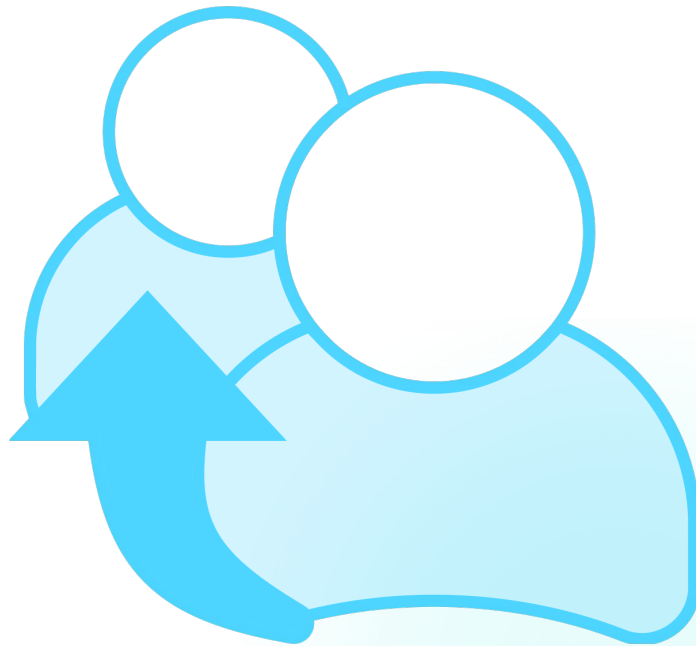
App detects screenshot and automatically creates deep link for better sharing experience



## Quick tips

- ✓ **Make it easy to share**  
Allow users to easily share deep links via their preferred platforms, including social media, email, text, etc.
- ✓ **Utilize user-generated links**  
Give users a way to create their own QR codes or user-generated content (UGC) to expand your reach.
- ✓ **Try custom share sheets**  
Use custom share sheets to enable users to share links to content with friends via multiple social media platforms and text messages. Bonus! With deep links, recipients of the link are taken directly from the link to the specific content that was shared.
- ✓ **Show the referrer's name**  
Create shortcuts to trust and belonging by showing the name of the referrer and taking users straight to the content they want.

[Read the case study](#): A robust referral program helped marketplace app Rappi drive over 50 million total app installs.



# Conclusion

As consumers become more savvy, their expectations will continue to rise. Crafting exceptional experiences with customers in mind is a foolproof way to exceed expectations, win new customers, and keep the ones you already have.

With smart experimentation, the right measurement, and a few tweaks to your CX strategies, growth is still very much on the horizon.

The world of mobile is a world of possibility. **Let's get started!**





## About Branch

**Branch is the linking and measurement partner for growth-focused teams, trusted to maximize the value of their evolving digital strategies. World-class brands like Instacart, Western Union, NBCUniversal, ZocDoc and Sephora rely on Branch to acquire users, retain customers and drive more conversions.**

branch.io

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