

Introduce Helpful Tips to Drive Customer Success



Chances are, you have competitors offering similar products similar to yours. To build and retain loyal customers, you need to differentiate. One way you can do that is by offering relevant tips and tricks to ensure customers get the most out of your application.

Category	Customer Success	Vertical	Technology
Topic	Differentiate your app by offering relevant tips and tricks to ensure customers get the most out of your application	ID #	238

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Example

A customer logs into your application for the first time and is taken through an [onboarding process](#). The customer follows the suggested actions to get set up, but then starts exploring the application. When he selects "Profile," he is presented with a message that says, "Adding a profile for all your employees increases adoption of your application."

The screenshot shows the DATADD application interface. At the top, there are navigation tabs: PROFILE, ORDERS, SCHEDULE, GALLERY, and SUPPORT. A search bar is on the right. The main content area is divided into three sections:

- Profile:** Features a profile picture of a man in a suit. A red-bordered callout box titled "Tip Time" with a close button (X) contains the text: "Adding a profile for all your employees increases adoption of your application".
- Profile setup:** A form with the following fields:
 - Name: Michael
 - Birthday: 11/7/1967
 - E-mail: m.stones@info.com
 - Country: USA
- Revenue:** A stacked bar chart showing revenue over time. The y-axis ranges from \$0 to \$50,000. The chart shows several bars with a grey base and an orange top section. Above the chart are links for "Sales / day", "Sales / region", "Market share", and "More Reports >".

He logs out of the application and then comes back a week later to add a new user profile. He then sees a motivating message – "You are on the path to greatness - More profiles leads to More Success."

This screenshot is identical to the one above, showing the DATADD application interface. The "Tip Time" callout box now contains the text: "You are on the path to greatness. More profiles lead to more success...". The rest of the interface, including the profile setup form and the revenue chart, remains the same.

Segment

The segments would be set up as inclusive and exclusive when it comes to the messages that have been seen. For example, show message 3 to anyone who has seen Campaign 2, but has not seen Campaign 3 (unless they have dismissed message 1 or 2).

The screenshot shows a configuration interface for a segment named "Show Campaign 3". At the top, the logic is summarized: "Viewed campaign Campaign 2 at least once AND Did not view campaign Campaign 3 at least once". Below this, the full rule is displayed: "Did not dismiss campaign Campaign 2 at least once OR Did not dismiss campaign Campaign 1 at least once". The interface includes tabs for "Users (0)", "Trends", "Engagement Compare", and "Setup". A "Segment Name" field contains "Show Campaign 3". There are "AND" and "OR" buttons for logical grouping. The main rule is structured as follows:

- Group 1 (AND):
 - Rule 1: Campaigns [Campaign 2] Campaign Stat C... [view] User [did] view [Campaign 2] any experience specific experience at least 1 time
 - Rule 2: Campaigns [Campaign 3] Campaign Stat C... [did not] view [Campaign 3] any experience specific experience at least 1 time
- Group 2 (OR):
 - Rule 3: Campaigns [Campaign 2] Campaign Stat C... [did not] dismiss [Campaign 2] any experience specific experience at least 1 time
 - Rule 4: Campaigns [Campaign 1] Campaign Stat C... [did not] dismiss [Campaign 1] any experience specific experience at least 1 time

Buttons for "SAVE" and "CANCEL" are visible in the top right corner.

Measure

This is a long term play, but we could measure how many people who saw the message do see the second message, showing that they are on the right path.

Setup

This would be a series of messages taking the customer through a journey on the site. There would be a series of segments which, based on whether the customer has seen the first message, would present the second message if they return within a specific time frame.