# Introduce Helpful Tips to Drive Completion

Often for businesses, one of the great challenges can be to help assist prospects and customers with taking the final steps to complete a registration or activation process for a key service or value added product. Up until the time they do, if they do, you are faced with the potential costs and overhead required for those individuals stuck in limbo. By driving an effective targeting and engagement for these visitors, from the beginning, and helping ensure they get the most up to date information and guidance necessary to complete the process, you can improve your adoption rates, while not adding additional costs to your human assisted channels to drive these results.

Category	Customer Success	Vertical	Financial Services
Topic	Personalize the visitor experience based on the email campaign that brought them to your site	ID #	372

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Example

An individual visits your website looking for information about a wealth management platform that you offer. She takes only a partial step forward – resulting in an outbound email generated to promote the service. After the email has been generated, but before your prospect opens it, she completes the initial registration process. What do you do? Do you send another email, hoping she will focus on the more current communication that illustrates how to best leverage the new tool, or just hope for the best? Using Evergage, you can segment the customer and create a targeted personalized message to her including on-boarding recommendations and a product tour. Best of all, since Evergage for Email functions on open-time, you only need to send one email since it can be updated to present content and materials that are relevant to the visitor in the moment, not yesterday, or late last week – and based on any activity on your site - mobile or web.

Initial email content: "Learn More"

Same email updated at open time: "Take the Tour"
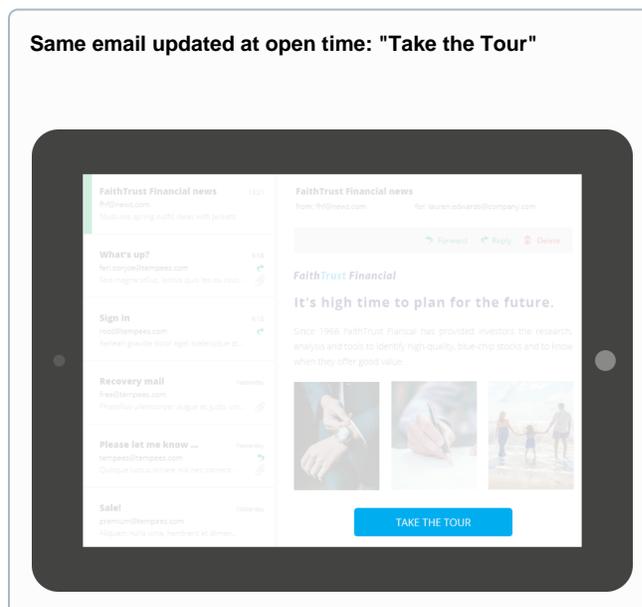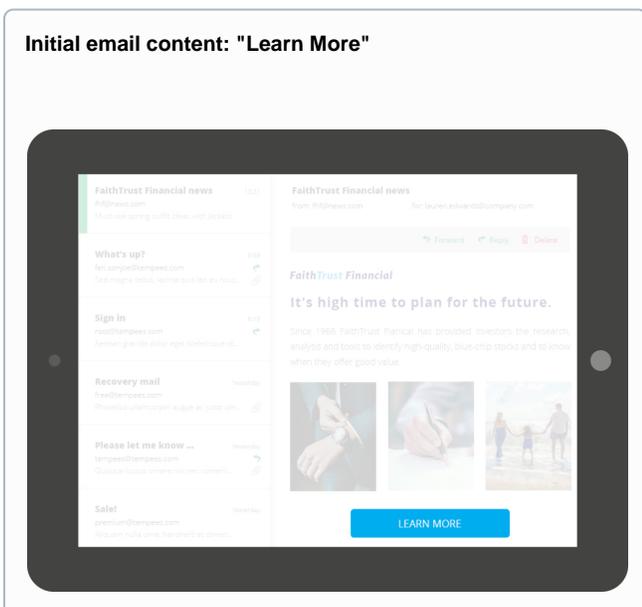
Segment

Build a segment of visitors who have completed the online registration process, but have not taken the online tour or leveraged the new tool (or platform) since registering.

Measure

Campaign success can be measured by click-throughs for the "Take the Tour" campaign as well as platform adoption and usage - as compared to a control group.

Setup

Process

Here are the high-level process steps you should follow to execute on this play:

- Create a segment of visitors meeting the criteria outlined in the Segment section above
- Create an email campaign(s) with the desired experiences
- Add a campaign level rule to show the campaign only to this segment of visitors
- Create a control group to help document and illustrate lift for the campaign(s)

Reference Materials

The following articles from the *Evergage Knowledge Base* will provide additional information about this play:

- Create or Edit a Web Campaign
- Popup Messages
- Add Rules for Campaigns, Experiences, and Messages
- Segments
- Email Campaigns