

# In Trial – Present A Relevant Offer



During a trial period, you want to make sure prospects have a positive experience with your application. By monitoring usage, you can promote relevant features and introduce incentives to encourage prospects to convert before the trial ends.

<b>Solution</b>	Customer Success	<b>Industries</b>	Technology, SaaS
<b>Topic</b>	Boost conversions by monitoring usage by trial users to promote features and offer incentives	<b>ID #</b>	221

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## Example

While in a free trial period, a prospect engaged with the “Revenue Reports” section of your application at least three times. As a result, a new tab, “More Reports,” appears in the application sub navigation. Because this is an area of interest, the prospect clicks the tab where and sees an example of some of the additional reports her or she can access upon becoming a paying customer.

## Segment

The key is to segment by those who have been engaged in the specific feature. In this example, the segment is for users who have used the reports feature at least three times.

## Measure

The primary objective of this campaign is to get someone to become a paying customer. Global goals could be used to determine if the prospect has “completed the onboarding steps in the free trial” or “used support” (indicating how easy they found the product to use). It’s

always a good idea to test this campaign against a control to determine how the campaign compares with those who do not see the messages.

## Setup

This example uses an inline message, which is created as a sibling within current tab structure. It will only be shown to those who fall into the segment “Engaged – Show Premium.”

The screenshot shows the Evergage campaign setup interface for a campaign named "Reports Upsell". The interface is divided into a left sidebar and a main content area. The sidebar, under "CAMPAIGN SETTINGS", includes "OVERVIEW", "HISTORY", "EXPERIENCES", "Experience 1", and a plus icon for "Experience". The main content area is titled "Setup" and includes the following sections:

- Track Campaign Progress**: A sub-section with three fields: "Goal" (set to "Purchased Reports Pro"), "Measure of Success" (set to "Goal Completion Rate"), and "Priority" (set to 1).
- Test URL**: A text input field containing "http://saas.solida.evergage.com/sample-app/".
- Campaign Wide Rules**: A section for targeting users. It features a "Segment" dropdown menu, "INCLUDES" and "EXCLUDES" buttons, and the text "users in all of the following segments". Below this, a segment named "Engaged - Show Premium" is listed with a plus icon and an 'x' to remove it.