

Offer a Demo When Appropriate



Most companies focused on demand generation have a sales funnel that involves multiples steps. Ideally, when a prospect completes one stage of the funnel, you would encourage them to take the next logical step in your process. After all, asking someone to sign up for a demo the moment they land on your site may appear overly aggressive. A more tactful approach would be to wait until the visitor has engaged with your content and taken an initial action, such as watched a video. This indicates a certain level of interest in your solutions and a higher probability of being open to further engagement.

With Evergage, you can identify which stage of the sales funnel your visitors are in and hold off later stage calls-to-action until the timing is more appropriate. This tactic ultimately improves your chances of leading to desired outcomes.

Category	Demand Generation	Vertical	Technology, SaaS
Topic	Identify where visitors are in the buying process and present a call to action that matches the stage	ID #	218

Sections in this

Article

- Example
- Segment
- Measure
- Setup

Example

A visitor comes to your site and explores your product content. Because she has expressed high engagement with a particular product page (e.g. Breton), you present her with a related product video. After watching the video, she continues to explore the product web page and, upon scrolling down the page, she is presented with a demo request message. Wanting to learn more, she fills out the form feels and signs up for a demo.

Features	Details	Specifications
• Opportunity & Pipeline Mgmt.		• Email Marketing
• Task / Activity Management		• Lead Management
• Desktop Integration		• Case Management
• Territory & Quota Management		• Support Analytics
• Customer Contract		• Reporting

Segment

The message would be shown to people who have watched the product video, but who have not requested a demo.

AND OR

Actions Action Count did any of specific actions WatchedVideoB X at least 1 time for all time

AND

Actions Action Count did not do any of specific actions BookDemo X at least 1 time for all time

NEW RULE

Measure

The goal of this message is to get visitors to sign up for a demo. However, it's important to also consider global goals – “started free trial” or “became a customer” – to determine other positive outcomes that may be relevant for demand generation.

Setup

Process

Here is a checklist of what you need to do in Evergage to create this play on your own site:

1. This play is based on the stage the visitor is at so you will need to create segments. Create a segment of people who have watched the product video but not requested a demonstration.
2. Once the segment is built you can create a campaign based on that segment.
3. Use the Evergage form features to create the questions in the message which ensures they will be captured as user attributes and can be segmented on moving forward.
4. You can use a control group but you may also decide not to as you want to make sure you drive as many people as possible through the final stage of the funnel.

Reference Materials

The following articles from the *Evergage Knowledge Base* will provide process steps to help you execute this play:

- [Create or Edit a Web Campaign](#)
- [Add Rules for Campaigns, Messages, and Experiences](#)
- [Target Users Based on a Segment](#)
- [Segment Rules](#)
- [Create a Segment](#)
- [Style Evergage Messages](#)