In Trial – Prospect Onboarding

When a prospect decides to try your web application, your number one priority is to ensure he or she has a positive experience. This includes making sure the prospect understands what they need to do to get the most out of your solution. When the user first logs in, you can present him or her with on-boarding instructions that will lead to a successful experience. Furthermore, asking timely questions can also help you tailor the user's experience and provide your sales team with important insights that can aid in the sales process.

Category	Customer Success	**Vertical**	Technology, SaaS
Topic	Help trial users get the most out of your product with personalized on-boarding	**ID #**	220

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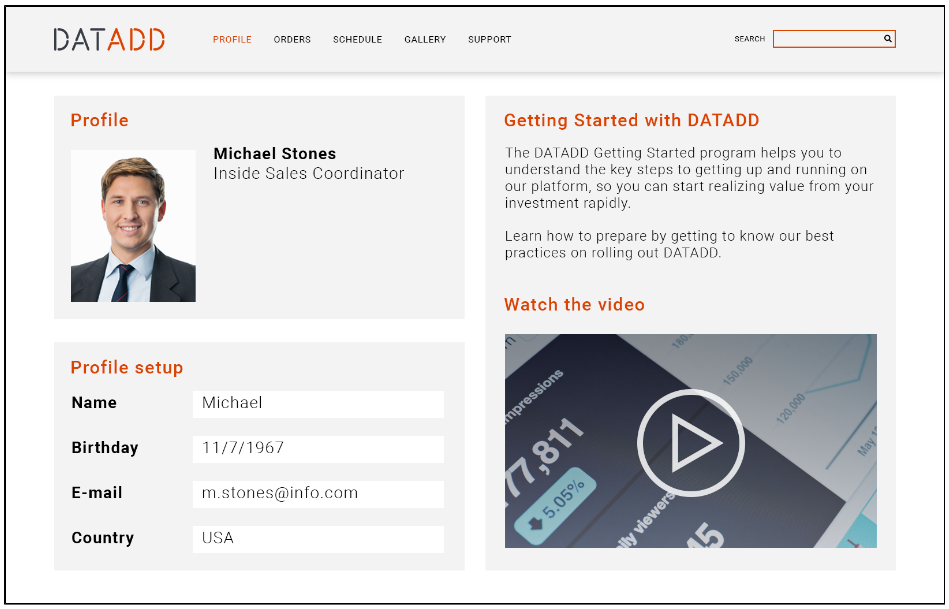
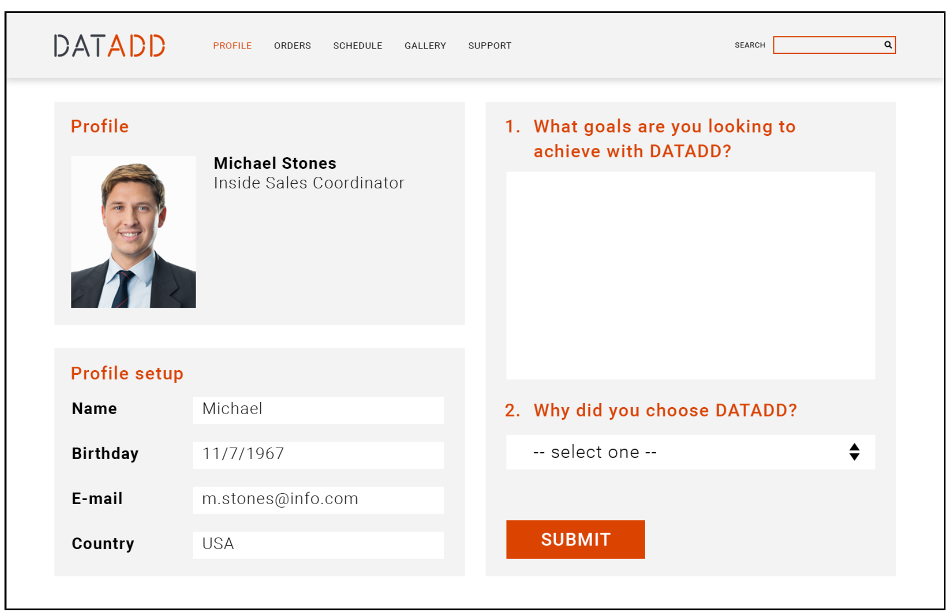
Example

A visitor signs up for your free trial and logs into your web application where he's taken to an overview screen. Because it's the first time he's logged in, he's presented with a video ("Getting started with our product") on the right side of the screen. Interested in learning more, the user clicks to watch the video.



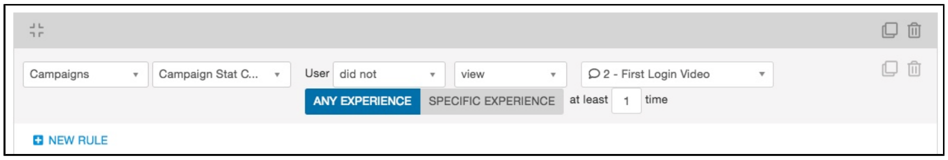
Once the video is finished, the user is presented with another message – in the same area the video is located – asking a few basic questions about how he plans to use your solution. He answers the questions and then continues on with his free trial or decides to upgrade.



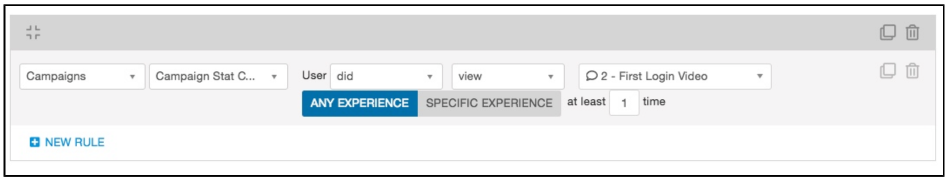
Segment

This example uses several segments – one for each stage a prospect moves through.

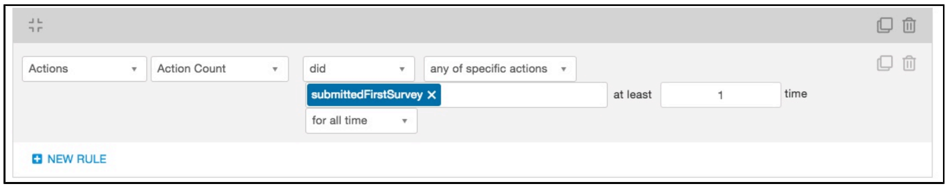
Has not seen the video.



Has seen the video.



Has submitted the form.

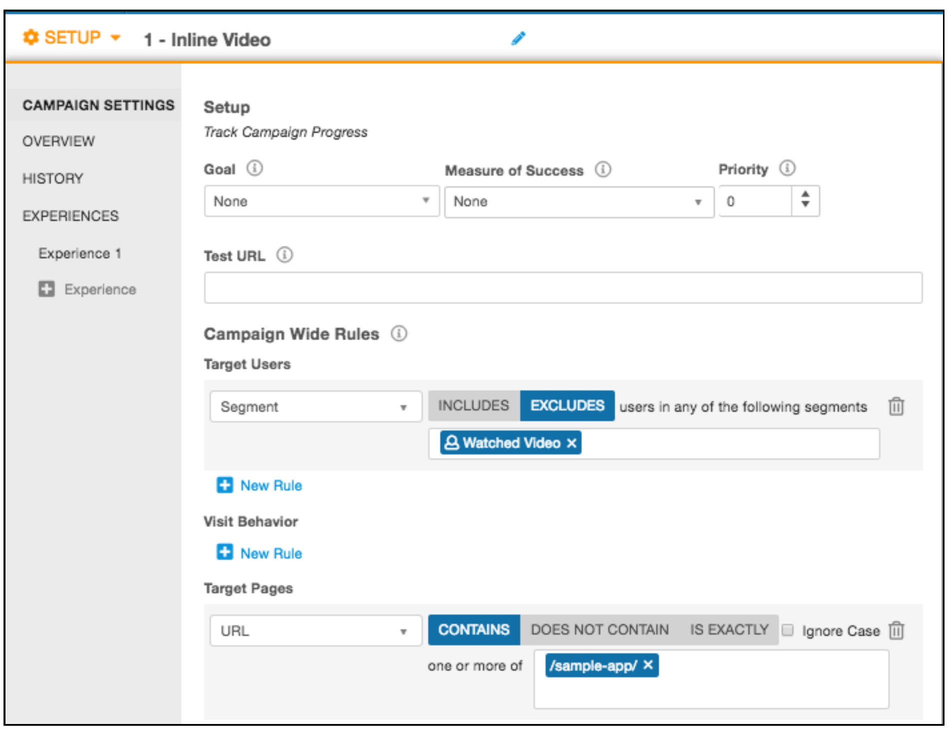


Measure

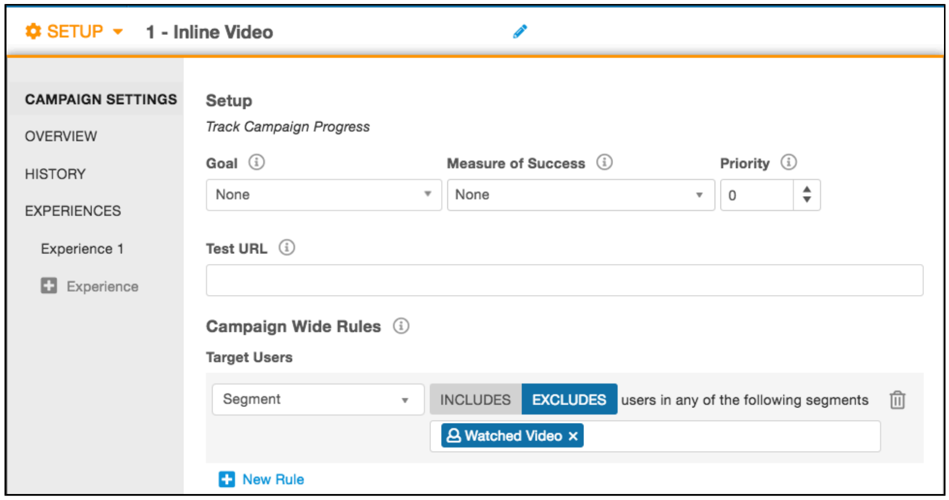
The goal of this message is to get a prospect to complete certain on-boarding steps. Provided there are two steps in this example, you could use global goals like “watched video” and “answered survey” to measure results. Since getting the prospect to convert to a paying customer is the ultimate objective, this should be included as a global goal too. 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

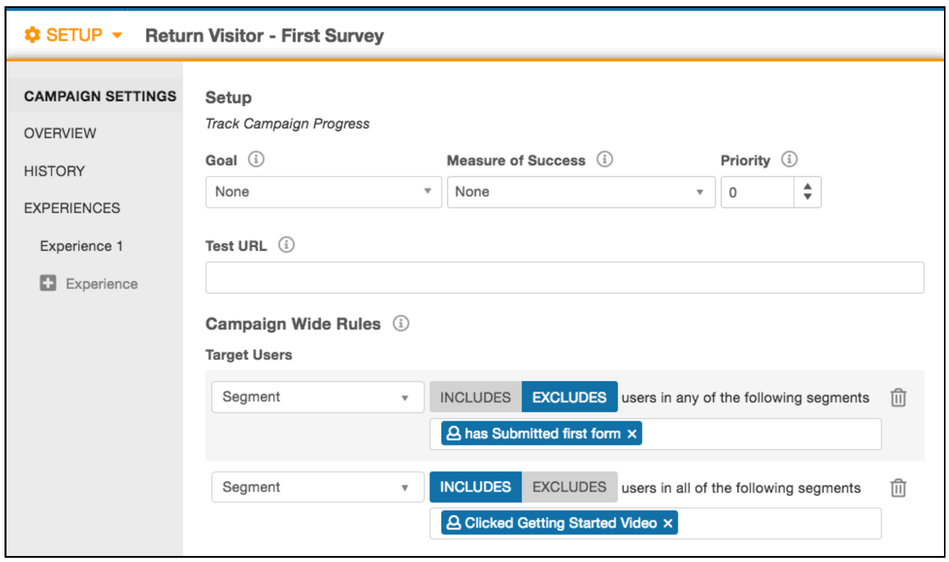
There are two messages in this campaign. The first is an inline message with the on-boarding video. It appears on the overview page to everyone who has not previously viewed the video. However, because the prospect may not be interested in the video, it’s generally a good idea to remove it if the prospect has not watched it after 2-4 visits.



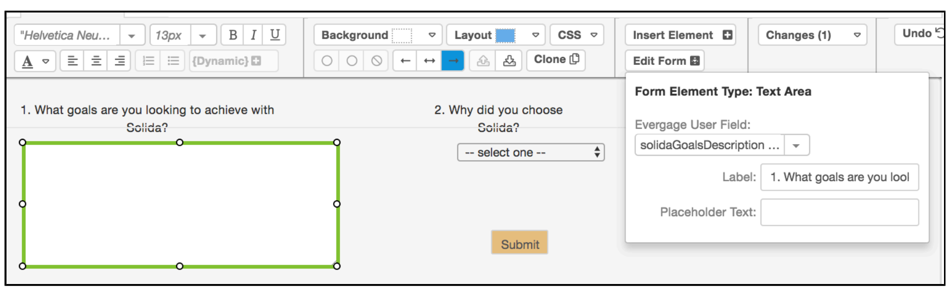
Only show the video the first three times a prospect logs on and does not watch the video.

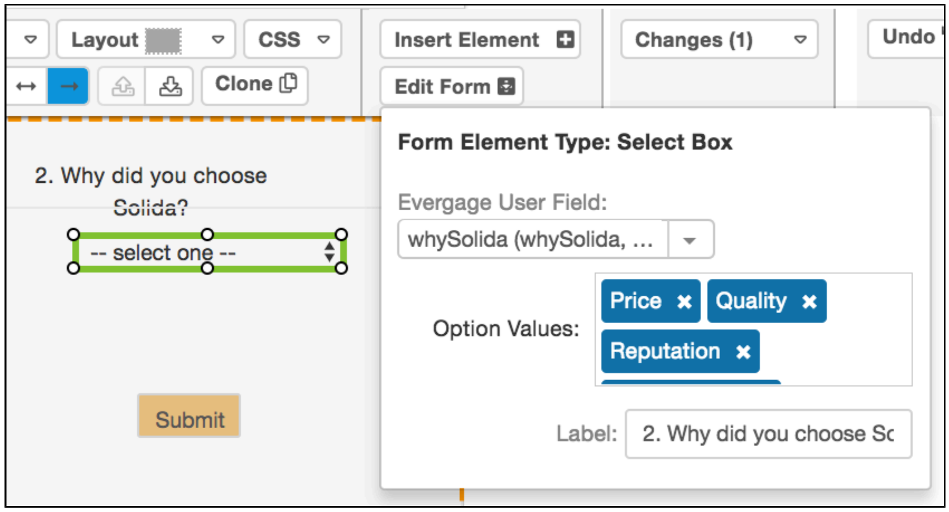


The second message is a survey. It replaces the same area as the video, but is only shown to people who have watched the video. If a prospect doesn't answer the questions when initially presented, configure the message not to appear again.



In this playbook example, the questions require form fields for users to submit answers so you would have to include a "text input" field and a "dropdown" field. You would also need to create a "submit" button, which can easily be added using the Evergage Platform.

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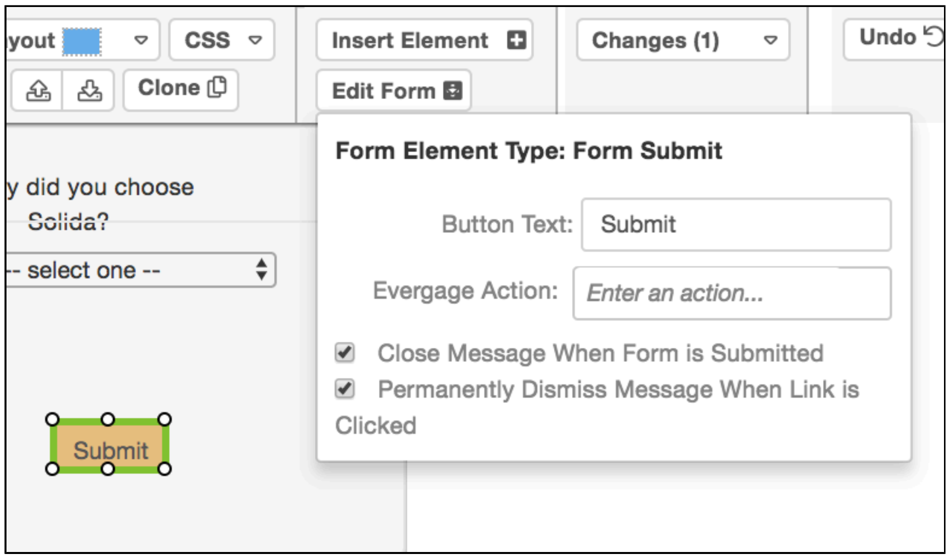
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