

# 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.

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

**Sections in this Article**

- Example
- Segment
- Measure
- Setup

## 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.

The screenshot shows the DATADD user interface. At the top, there is a navigation bar with 'DATADD' and links for 'PROFILE', 'ORDERS', 'SCHEDULE', 'GALLERY', and 'SUPPORT'. A search bar is on the right. The main content area is divided into two columns. The left column contains a 'Profile' section with a photo of Michael Stones, an 'Inside Sales Coordinator', and a 'Profile setup' form with fields for Name (Michael), Birthday (11/7/1967), E-mail (m.stones@info.com), and Country (USA). The right column features a 'Getting Started with DATADD' section with introductory text and a 'Watch the video' button. Below the button is a video player showing a dashboard with metrics like 'Impressions' and 'Daily Viewers'.

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.

This screenshot shows the same DATADD user interface as the previous one, but the right column now displays a survey. The 'Profile' and 'Profile setup' sections remain on the left. The survey on the right has two questions: '1. What goals are you looking to achieve with DATADD?' and '2. Why did you choose DATADD?'. The second question has a dropdown menu with the text '-- select one --'. A red 'SUBMIT' button is located at the bottom of the survey area.

## Segment

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

*Has not seen the video.*

A screenshot of a rule configuration interface. The top row contains dropdowns for 'Campaigns', 'Campaign Stat C...', 'User' (set to 'did not'), 'view', and '2 - First Login Video'. Below these are buttons for 'ANY EXPERIENCE' and 'SPECIFIC EXPERIENCE', followed by 'at least 1 time'. A '+ NEW RULE' button is at the bottom left.

*Has seen the video.*

A screenshot of a rule configuration interface. The top row contains dropdowns for 'Campaigns', 'Campaign Stat C...', 'User' (set to 'did'), 'view', and '2 - First Login Video'. Below these are buttons for 'ANY EXPERIENCE' and 'SPECIFIC EXPERIENCE', followed by 'at least 1 time'. A '+ NEW RULE' button is at the bottom left.

*Has submitted the form.*

A screenshot of a rule configuration interface. The top row contains dropdowns for 'Actions', 'Action Count', 'did', 'any of specific actions', and 'submittedFirstSurvey X'. Below these are 'at least 1 time' and 'for all time' options. A '+ NEW RULE' button is at the bottom left.

## 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 video 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.

A screenshot of the 'Setup' configuration page for an inline video campaign. The page is titled '1 - Inline Video'. On the left is a sidebar with 'CAMPAIGN SETTINGS', 'OVERVIEW', 'HISTORY', and 'EXPERIENCES'. The main content area is divided into sections: 'Setup' (Track Campaign Progress), 'Goal' (None), 'Measure of Success' (None), 'Priority' (0), 'Test URL', 'Campaign Wide Rules' (Target Users: Segment, INCLUDES, EXCLUDES, Watched Video X), 'Visit Behavior', and 'Target Pages' (URL, CONTAINS, DOES NOT CONTAIN, IS EXACTLY, Ignore Case, /sample-app/ X).

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

**SETUP** 1 - Inline Video

**CAMPAIGN SETTINGS**

**Setup**  
Track Campaign Progress

Goal: None | Measure of Success: None | Priority: 0

Test URL:

**Campaign Wide Rules**

Target Users

Segment: [dropdown] INCLUDES EXCLUDES users in any of the following segments

Watched Video x

+ New Rule

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.

**SETUP** Return Visitor - First Survey

**CAMPAIGN SETTINGS**

**Setup**  
Track Campaign Progress

Goal: None | Measure of Success: None | Priority: 0

Test URL:

**Campaign Wide Rules**

Target Users

Segment: [dropdown] INCLUDES EXCLUDES users in any of the following segments

has Submitted first form x

Segment: [dropdown] INCLUDES EXCLUDES users in all of the following segments

Clicked Getting Started Video x

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.

Helvetica Neu... 13px B I U Background Layout CSS Insert Element Changes (1) Undo

1. What goals are you looking to achieve with Solida?

2. Why did you choose Solida?

-- select one --

Submit

**Form Element Type: Text Area**

Evergage User Field: solidaGoalsDescription ...

Label: 1. What goals are you lool

Placeholder Text:

Layout CSS

Insert Element + Changes (1) Undo

Edit Form

2. Why did you choose Solida?

-- select one --

Submit

**Form Element Type: Select Box**

Evergage User Field: whySolida (whySolida, ...)

Option Values: Price x Quality x Reputation x

Label: 2. Why did you choose Sc

Layout CSS

Insert Element + Changes (1) Undo

Edit Form

y did you choose Solida?

-- select one --

Submit

**Form Element Type: Form Submit**

Button Text: Submit

Evergage Action: Enter an action...

Close Message When Form is Submitted

Permanently Dismiss Message When Link is Clicked