Real Time Personalized Email - Onboarding

When you personalize your website in real time with Evergage, you reach your site goals faster. Using *Evergage for Email* , you can populate emails with content in real-time, extending the reach of your website and making your emails more impactful. Sending action-based emails versus time-based emails increases relevancy, so it's more likely that prospects will interact with them. This is particularly important as you are on-boarding a new client or hoping to convert someone who is in a free trial of your product.

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Example

A prospect signs up for a free trial and he is taken to the homepage of your app. There is a message on the site that shows the four key steps he needs to take to set up the product, as well as videos showing the process. He takes the first action, but then has to run to a meeting and isn't able to go any further.

Since all free trial users receive a series of emails from your marketing automation system, he will get the first one the following day. Instead of a generic email listing the 4 steps he needs to take, he receives a personalized welcome to the site, with dynamically populated content based on his set-up stage. "Thanks for completing you user setup - you only have 3 more steps to take to complete the set up - Click here to add other users credentials." The email reminds him that he had started the set-up process, but had to go a meeting. This time, he opens the email and completes 2 more steps before he has to take a call.

Using Evergage as an example, he receives an email the next day to say thanks for setting up the beacon in the site, and has a link to start creating campaigns, the next step of the process. He is set up and ready to proceed at his own pace, but guided by the emails.

Segment

This campaign relies on segments based on the visitor's stage of the on-boarding journey. You would create a segment based on whether they have begun the process. A second segment would be for people who have completed step 1 but not step 2, etc.

Measure

The measure of success of this campaign would be based on the number of trial conversions.

Setup

Process

This requires *Evergage for Email* to be enabled. Reach out to your customer success team for more details.

Reference Materials

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

- Create or Edit a Campaign
- Add Rules for Campaigns, Messages, and Experiences
- Target Users Based on a Segment
- Segment Rules
- Create a Segment
- Email Campaigns