

Introduce Helpful Tips to Drive Customer Success



Chances are, you have competitors offering similar products similar to yours. To build and retain loyal customers, you need to differentiate. One way you can do that is by offering relevant tips and tricks to ensure customers get the most out of your application.

Category	Customer Success	Vertical	Technology
Topic	Differentiate your app by offering relevant tips and tricks to ensure customers get the most out of your application	ID #	238

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Example

A customer logs into your application for the first time and is taken through an [onboarding process](#). The customer follows the suggested actions to get set up, but then starts exploring the application. When he selects "Profile," he is presented with a message that says, "Adding a profile for all your employees increases adoption of your application."

The screenshot shows the DATADD application interface. At the top, there are navigation tabs: PROFILE, ORDERS, SCHEDULE, GALLERY, and SUPPORT. A search bar is on the right. The main content area is divided into two columns. On the left, there is a 'Profile' section with a user profile picture and a 'Profile setup' form. The form fields are: Name (Michael), Birthday (11/7/1967), E-mail (m.stones@info.com), and Country (USA). On the right, there is a 'Revenue' section with a bar chart showing sales data. A 'Tip Time' message box is overlaid on the profile section, containing the text: "Adding a profile for all your employees increases adoption of your application."

He logs out of the application and then comes back a week later to add a new user profile. He then sees a motivating message – "You are on the path to greatness. More profiles lead to more success."

The screenshot shows the DATADD application interface, similar to the previous one. The 'Tip Time' message box now contains the text: "You are on the path to greatness. More profiles lead to more success..."

Segment

The segments would be set up as inclusive and exclusive when it comes to the messages that have been seen. For example, show message 3 to anyone who has seen Campaign 2, but has not seen Campaign 3 (unless they have dismissed message 1 or 2).

Show Campaign 3

Viewed campaign Campaign 2 at least once AND Did not view campaign Campaign 3 at least once

AND

Did not dismiss campaign Campaign 2 at least once OR Did not dismiss campaign Campaign 1 at least once

Users (0) Trends Engagement Compare Setup

Segment Name:

AND OR																	
✕																	
Campaigns	Campaign Stat C...	User	did	view	Campaign 2	any experience	specific experience	at least	1	time	✕						
AND	Campaigns	Campaign Stat C...	User	did not	view	Campaign 3	any experience	specific experience	at least	1	time	✕					
NEW RULE																	
AND																	
✕																	
AND OR																	
Campaigns	Campaign Stat C...	User	did not	dismiss	Campaign 2	any experience	specific experience	at least	1	time	✕						
OR	Campaigns	Campaign Stat C...	User	did not	dismiss	Campaign 1	any experience	specific experience	at least	1	time	✕					
NEW RULE																	

Measure

This is a long term play, but we could measure how many people who saw the message do see the second message, showing that they are on the right path.

Setup

This would be a series of messages taking the customer through a journey on the site. There would be a series of segments which, based on whether the customer has seen the first message, would present the second message if they return within a specific time frame.