

In Trial – Present A Relevant Offer



During a trial period, you want to make sure prospects have a positive experience with your application. By monitoring usage, you can promote relevant features and introduce incentives to encourage prospects to convert before the trial ends.

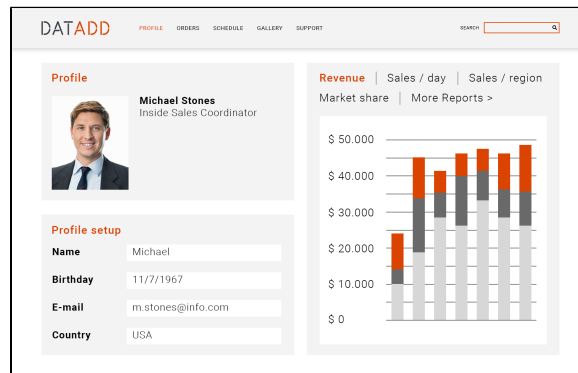
Solution	Customer Success	Industries	Technology, SaaS
Topic	Boost conversions by monitoring usage by trial users to promote features and offer incentives	ID #	221

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Example

While in a free trial period, a prospect engaged with the “Revenue Reports” section of your application at least three times. As a result, a new tab, “More Reports,” appears in the application sub navigation. Because this is an area of interest, the prospect clicks the tab where and sees an example of some of the additional reports her or she can access upon becoming a paying customer.



Segment

The key is to segment by those who have been engaged in the specific feature. In this example, the segment is for users who have used the reports feature at least three times.


The screenshot shows a rule configuration interface. It includes a dropdown for 'Actions', a dropdown for 'Action Count', and a dropdown for 'did'. Below these, there are three blue buttons with white text: 'Clicked Sales per Region X', 'Clicked Sales per Day X', and 'Clicked Market Share X'. To the right of these buttons is the text 'at least' followed by a text input field containing the number '3' and the word 'times'. At the bottom, there is a dropdown for 'today' and a '+ NEW RULE' button.

Measure

The primary objective of this campaign is to get someone to become a paying customer. Global goals could be used to determine if the prospect has “completed the onboarding steps in the free trial” or “used support” (indicating how easy they found the product to use). 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


This example uses an inline message, which is created as a sibling within current tab structure. It will only be shown to those who fall into the segment “Engaged – Show Premium.”

SETUP Reports Upsell 

CAMPAIGN SETTINGS

Setup
Track Campaign Progress

Goal [ⓘ] Measure of Success [ⓘ] Priority [ⓘ]


 Purchased Reports Pro x

Test URL [ⓘ]

Campaign Wide Rules [ⓘ]

Target Users

Segment **INCLUDES** **EXCLUDES** users in all of the following segments

 Engaged - Show Premium x