

Promote Features with Evergage for Email



SaaS users are most successful when they know the most efficient process for completing their everyday tasks. The challenge is that all users have different needs. How do you easily promote the features that will have the most impact on each and every one of your users? Using Evergage for Email, you can - based on each individual's behaviors and processes in your application. As behaviors change, the promoting email changes to show new items that support those new needs.

Category	Evergage for Email	Vertical	Customer Success
Topic	Dynamically promote features in email messages	ID #	303

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Example

Use a set area of your email message to promote an underused feature. Configure Evergage rules to show a different item in the email after the user selects the original item to learn more. You can configure the campaign to promote features based on previous activity in your application. Since the message updates dynamically, you won't need to create, test, and deploy multiple email campaigns to show the features that will be most useful to each recipient.

Segment

To achieve this personalization strategy, create segments that identify visitors who have viewed the particular features you are promoting (so that you can point them toward a relevant related item)

Actions | Action Count | did | any of specific actions | Gallery | at least 1 | time for all time

Alternatively, use segments based on user roles or customer/account so that the content is personalized based on which item is most relevant for each recipient

Metrics | Text Attribute | Role | equals | Admin | case-sensitive

Measure

Success would be measured in the clickthrough rate related to that element of the email campaign (indicating relevance of content) as well as increased user engagement and/or an increase in the goals (likely tutorial video views, feature feedback survey responses, or feature usage) related to these content items.

Setup

Process

Here is a checklist of what you need to do in Evergage to create this play on your own site:

1. Create segments in Evergage related to platform activity tied to items you will be promoting and/or segments related to user role or customer/account (pulling from custom attributes you have loaded into Evergage)
2. Create an email campaign in Evergage with multiple experiences to display follow-up content items related to initial click/view activity and/or user role or customer/account

Reference Materials

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

- [Email Campaigns](#)
- [Create Segments Based on Custom Fields](#)
- [Create Segments Based on a Specific Action Count](#)