



Leveraging Platform WalkThroughs to
Boost Adoption and Engagement



Marc Sultzer

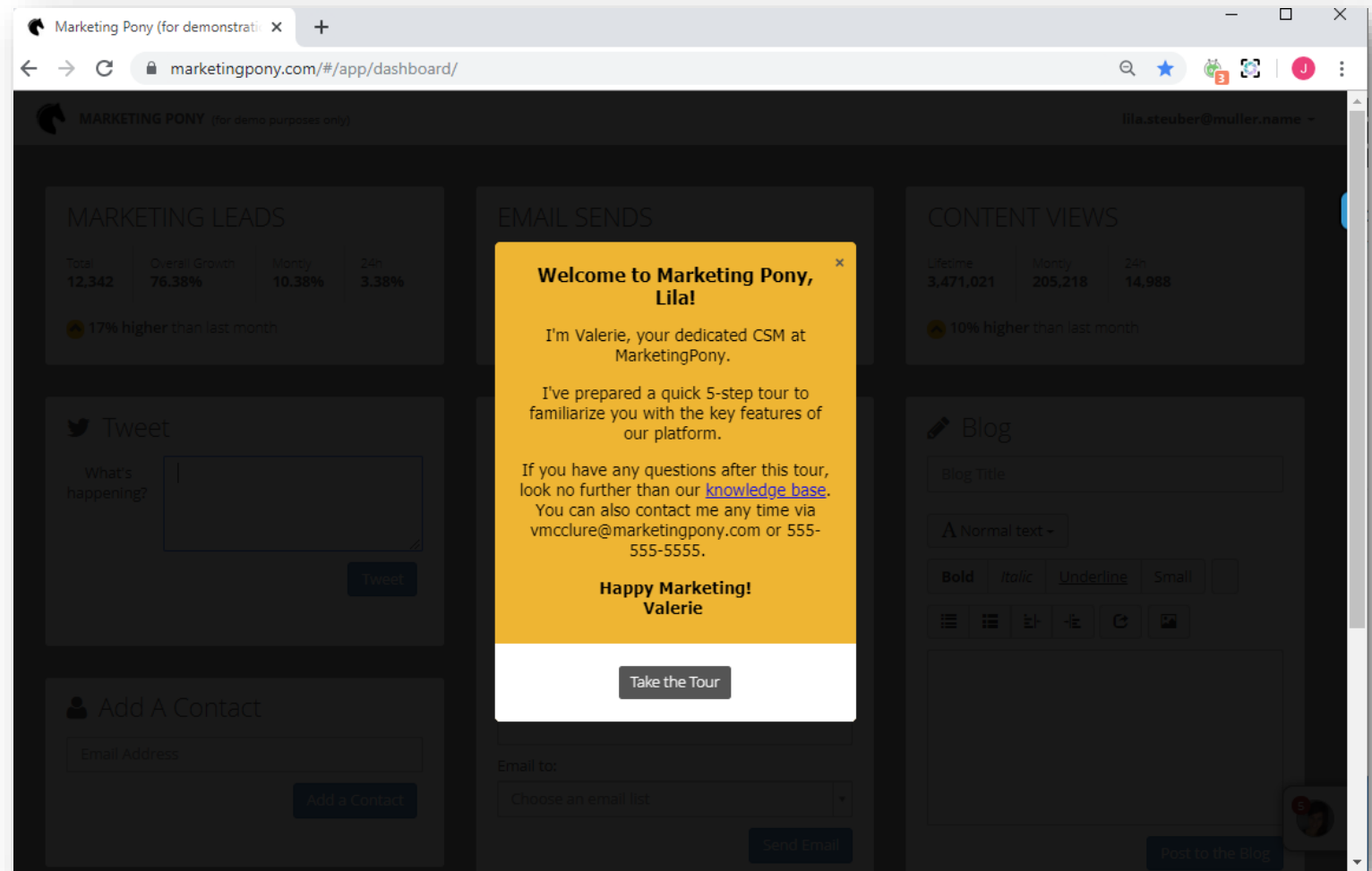
Account Executive, ChurnZero

Agenda

- 1 What are in-app walkthroughs?
- 2 Benefits from Walkthroughs
- 3 Personalization from Segments
- 4 The first 90 days
- 5 Report and Improve

What are Walkthroughs?

In short, walkthroughs are multi-step popups directly inside of your application designed to drive some sort of specific action or behavior



Poll: Does your application/product utilize in-application walkthroughs?

Yes

No

Benefits from Walkthroughs

Adoption

One of the best ways to encourage adoption is through product usage. In fact, **90% of knowledge is a result of practical experience**; the value of 'learning by doing' cannot be understated. WalkThroughs provide a powerful way to introduce new users to your app or highlight new features.

The average app loses **77% of its daily active users within the first 3 days of installation**. Day-zero user adoption is essential for long-term success.

Cost Saving

WalkThroughs can help technical organizations drive cost savings by **reducing staff intervention related to support and training requests**. By presenting product guidance in-app, **customer support ticket volume is reduced** through the encouragement of self-service learning.

Personalization

Through a 'what you see is what you get' interface, WalkThroughs allow Product and Customer Success teams to **provide personalized guidance to the users who need it most**.

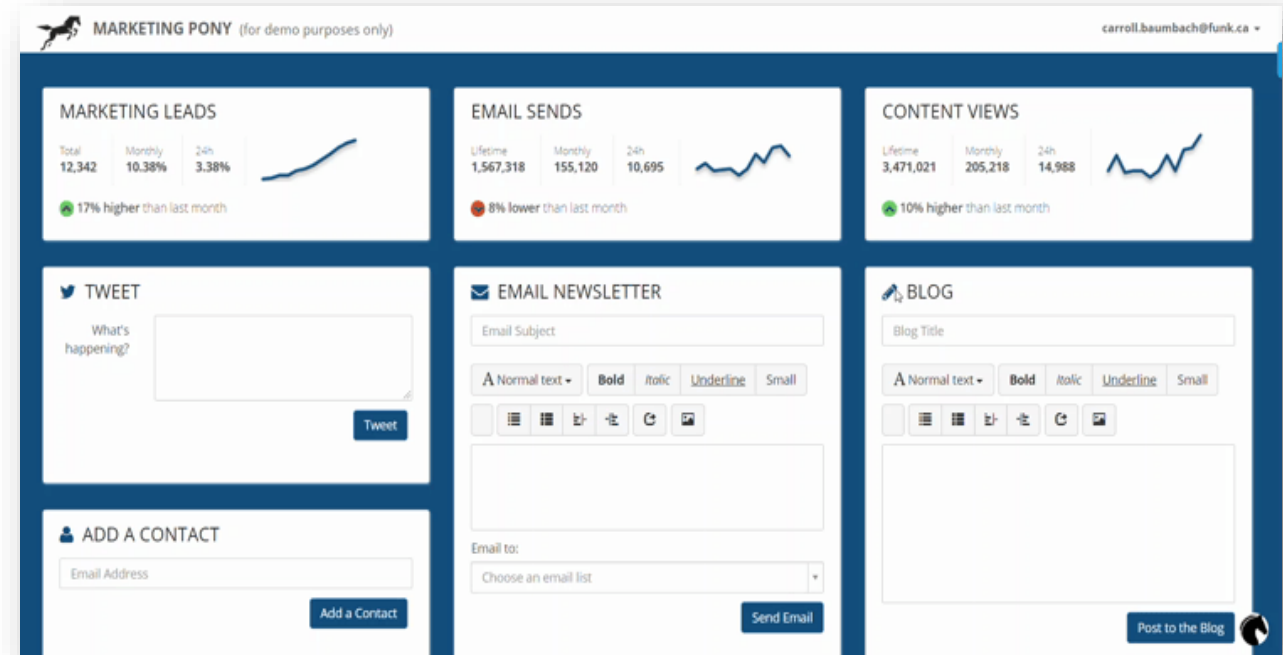
The tool is even more powerful when used in conjunction with ChurnZero's segmentation feature. In-app guidance can be delivered to specific customers based upon parameters like usage, NPS responses, etc.

Proactive Assistance

Provide your customer with the help they need by **going beyond the basic welcome tour** that is common in many apps. ChurnZero's in-app WalkThroughs **enable proactive assistance to users in need of help** instead of waiting for adoption lags. The use of tool tips allows for highlighting misunderstood or underutilized product features; this fosters deeper user adoption based on specific engagement data.

Segmenting your customer base at scale

- New users vs. existing users
- Admins vs. non-admins
- Which product purchased
- Low TCV vs. high TCV
- Users who have used a feature vs. those who haven't
- Self-service customers vs. dedicated CSM



The first 90 days : reducing TTV

Why?

In-app walkthroughs & messages boost user engagement by 3x – When they're in the application, it's when they're most engaged

In-app has a 2x higher click-through rate than email

Based on the micro-segmentation of the customer, identify core features they should be using, how often, and how to measure success

If users aren't achieving key success metrics, trigger personalized in-app walkthroughs

How?

The image shows a user interface for creating an email newsletter. On the left is a form titled "Email Newsletter" with fields for "Email Subject", a text editor with "Normal text" selected, and buttons for "Bold", "Italic", "Underline", "Small", and a "Send Email" button. Below the text editor is a dropdown menu labeled "Email to:" with the option "Choose an email list". On the right, a yellow tooltip box titled "Second, Send Your First Email" contains the text: "You've got cool things to share, make sure your contacts know it! We recommend emailing your list 2 - 4 times a month." and "You have monthly email credits of 85000." with a "Got It, Keep Going!" button at the bottom.

Monitor Trends to Identify Expansion Opportunities

Monitoring adoption trends is key to driving account expansion. Looking at usage data and license utilization, your team can easily identify which accounts are ready for upsell or cross-sell opportunities.

Use In-App Communication

Keep customers informed with targeted in-app messages alerting them of new product add-ons they might be interested in. In-app messaging allows you to engage customers at the optimal moment: as they use your product.

Use WalkThroughs to Convert Trial Users

Don't let customers get lost in your product. Lead them straight to value with multi-step in-app guided tours. By directly engaging and supporting users inside your application, your team is positioned to identify trial users who are ready to be converted into paid accounts.

Automate Expansion Sale Activities

Customer Success teams thrive by taking a data driven approach. Expansion sale activities are no exception. Use customer data and automation to trigger personalized communications that target the right customers, at the right time, with the most relevant upsell offers.

Poll: Who oversees in-app content in your org?

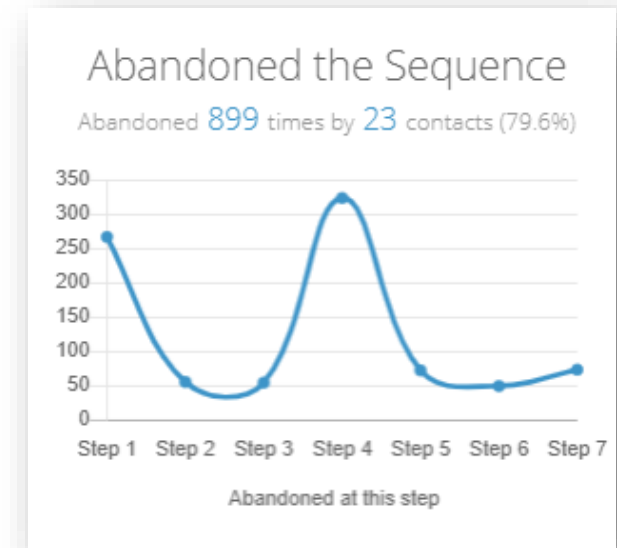
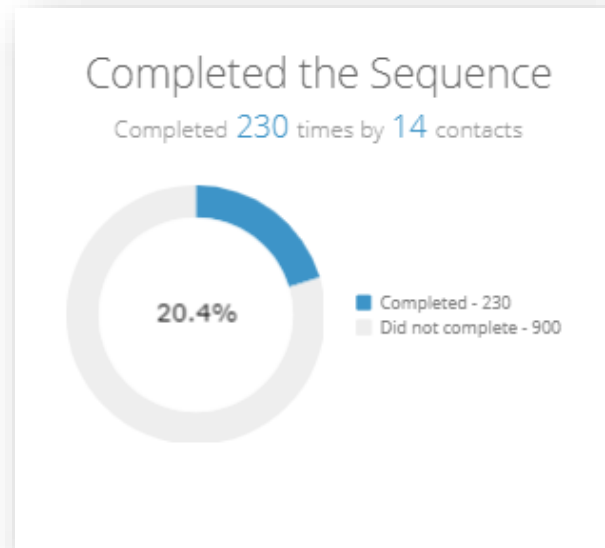
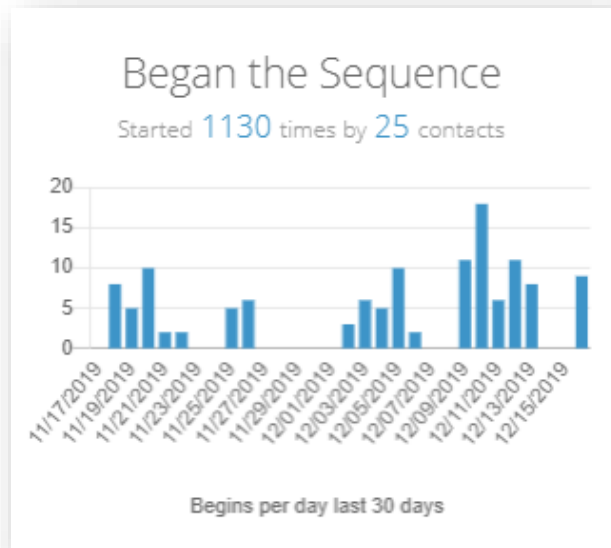
Product

CS

Both

Unsure

Report & Improve



Understand where to improve – where are customers “abandoning” the guide

Ask non-users of your application to see if the guide designs are easy to follow

Try different use-cases to see what works and what doesn't

Have a backup plan!!

Other Use-Cases of In-App Targeting

- Preemptively address most frequently submitted tickets
- For consumption models – How to add credits or tokens
- How to pay their bill
- New feature announcements
- Contact their CSM regarding important account issues
- Event or webinar signup
- Access to content or knowledgebase
- Self-service onboardings
- Upsell opportunities
- Escalations

Takeaways

- Remember your users are most engaged when they're already in your app – take advantage
- Don't treat all users the same
- Be deliberate with your walkthroughs and aim for a specific outcome
- Design, test and repeat


Thank You





Marc Sultzer

Account Executive, ChurnZero
msultzer@churnzero.net



 churnzero.net

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 linkedin.com/company/churnzero