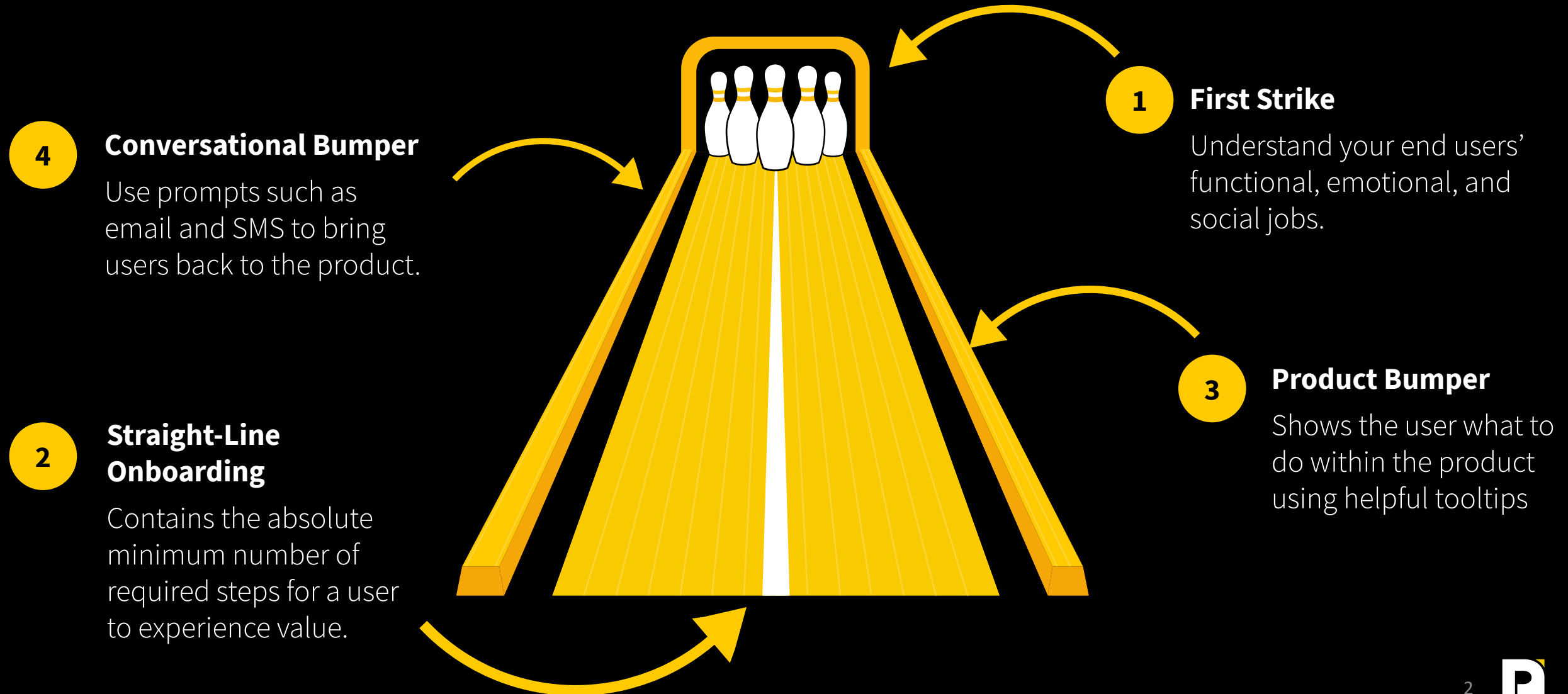
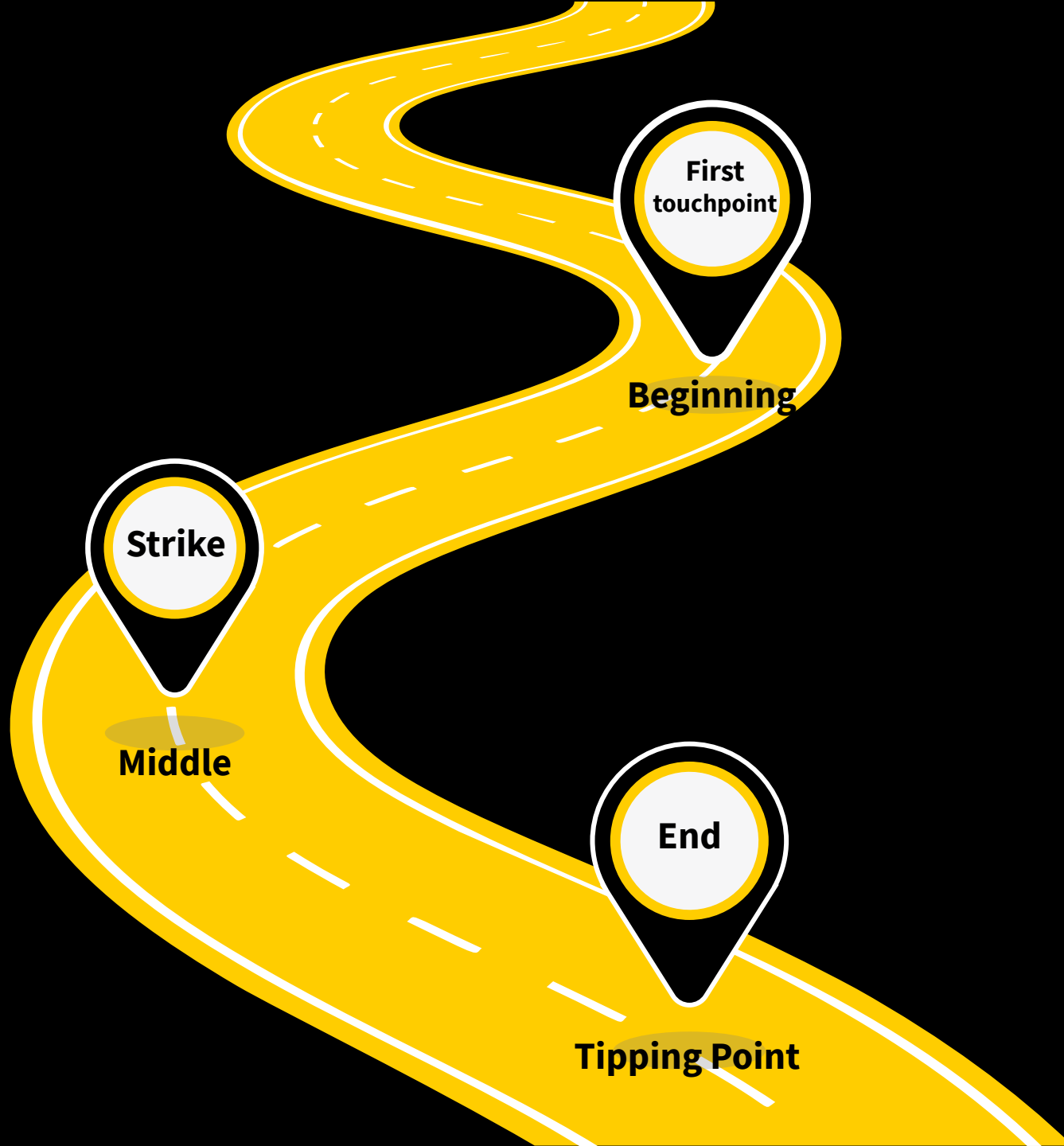


Educate Your Users with Conversational Bumpers



Prerequisite Course: Build Your Straight-Line Onboarding





Once you've identified both end user success and the first strike in your product, you're ready to reverse engineer what it takes to get there.

Common Product Bumpers.



Progress indicators



Welcome messages



Empty states



Success states



Product tours and walkthroughs



Checklists



Tooltips



Hotspots

Q&A.

What questions do you have about what we've covered in this program so far?



Walkthrough.

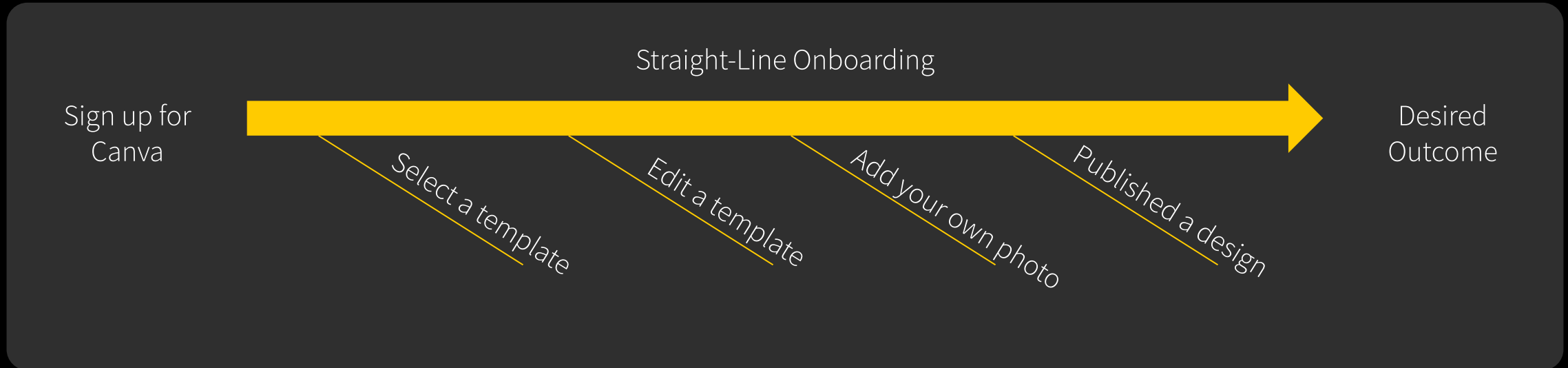
canva.com



How did they use product bumpers effectively?



Example: Canva's Straight-Line Onboarding.





Objectives.

1

Understand the importance of conversational bumpers

2

Building a straight-line onboarding email strategy

3

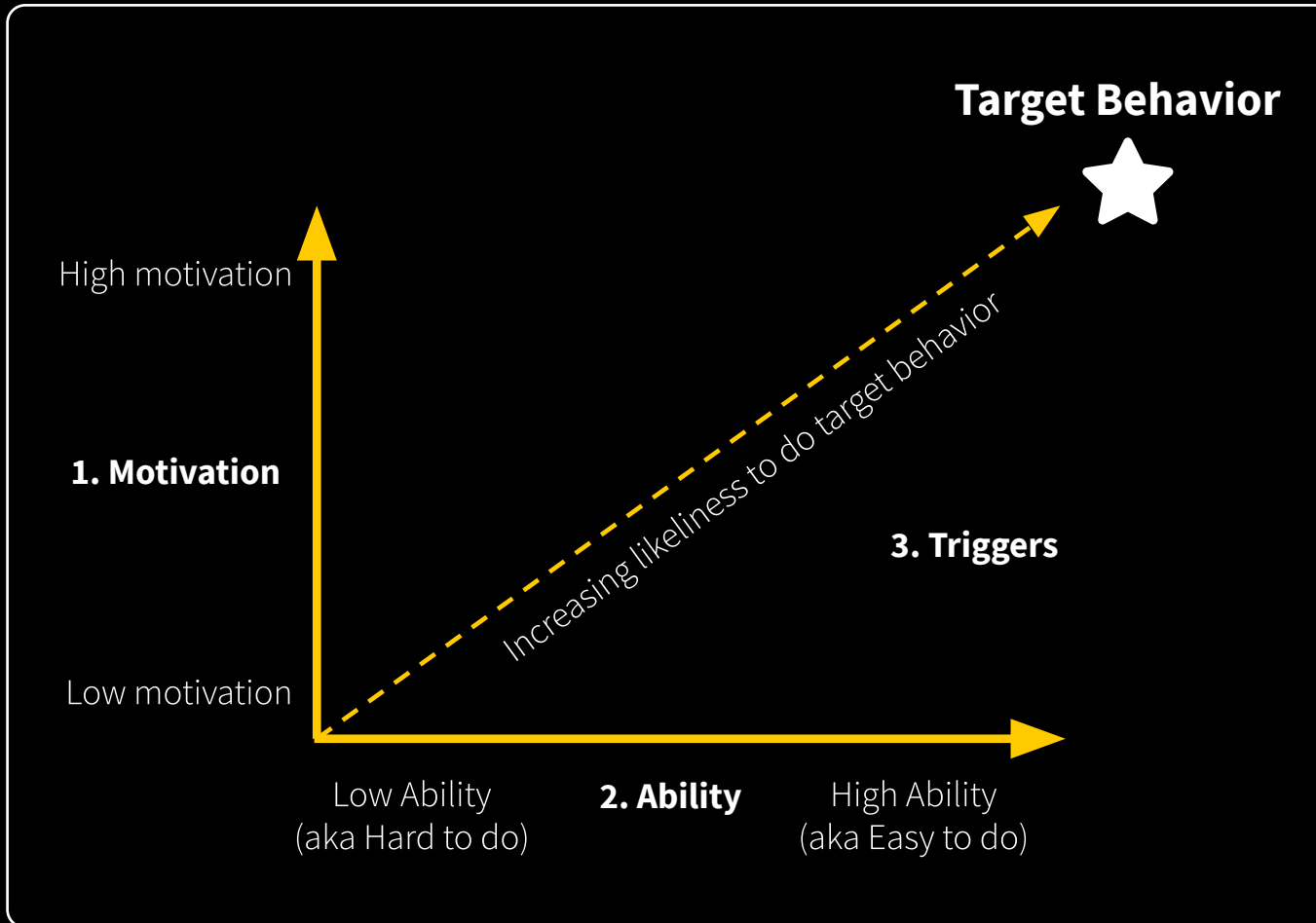
Common types of conversational bumpers

1

The Importance of Conversational Bumpers.



BJ Fogg Behavior Model.



Increase motivation



Increase ability
(easier to do)

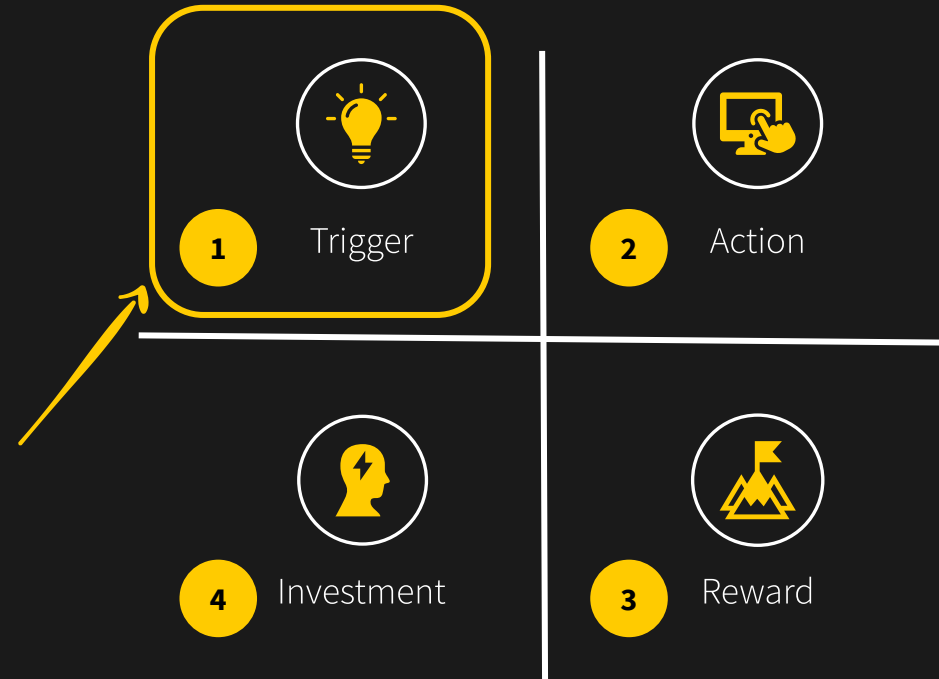


Increases likelihood of
doing target behavior

Hook Framework.

The Hook Framework is a four-phase process that businesses can use to create products or services used habitually by customers. Nir Eyal, an entrepreneur, author, and behavioral economist, developed it.

The Four Steps To Build Habit-Forming Products



Two Kinds Of Triggers.



Internal Triggers



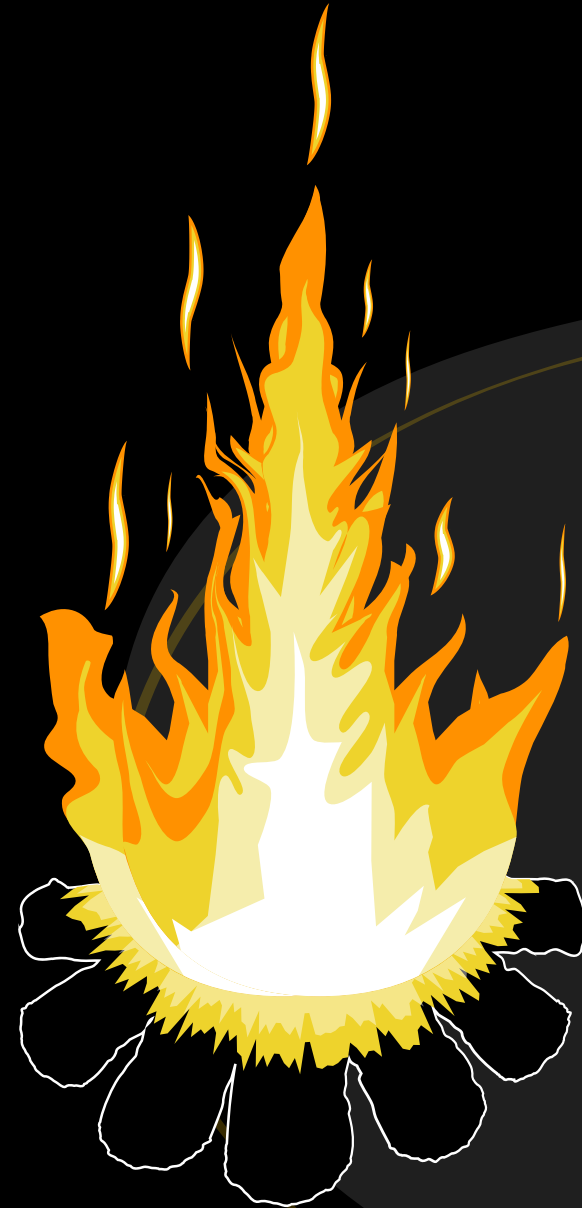
External Triggers





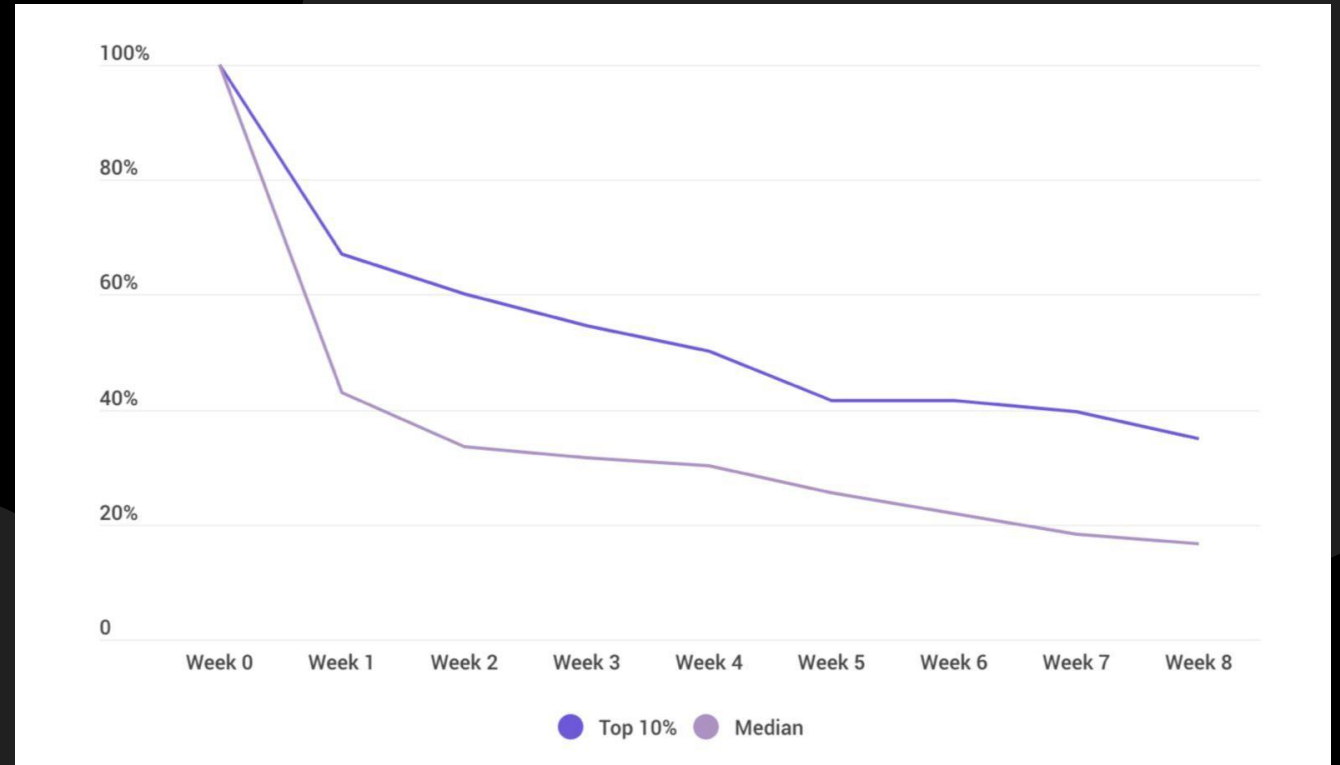
External Triggers Have A Short Life Span.

Think of them as kindling to a fire. You need them to start but the goal is to not need them in the long run. That's when the internal trigger takes over.

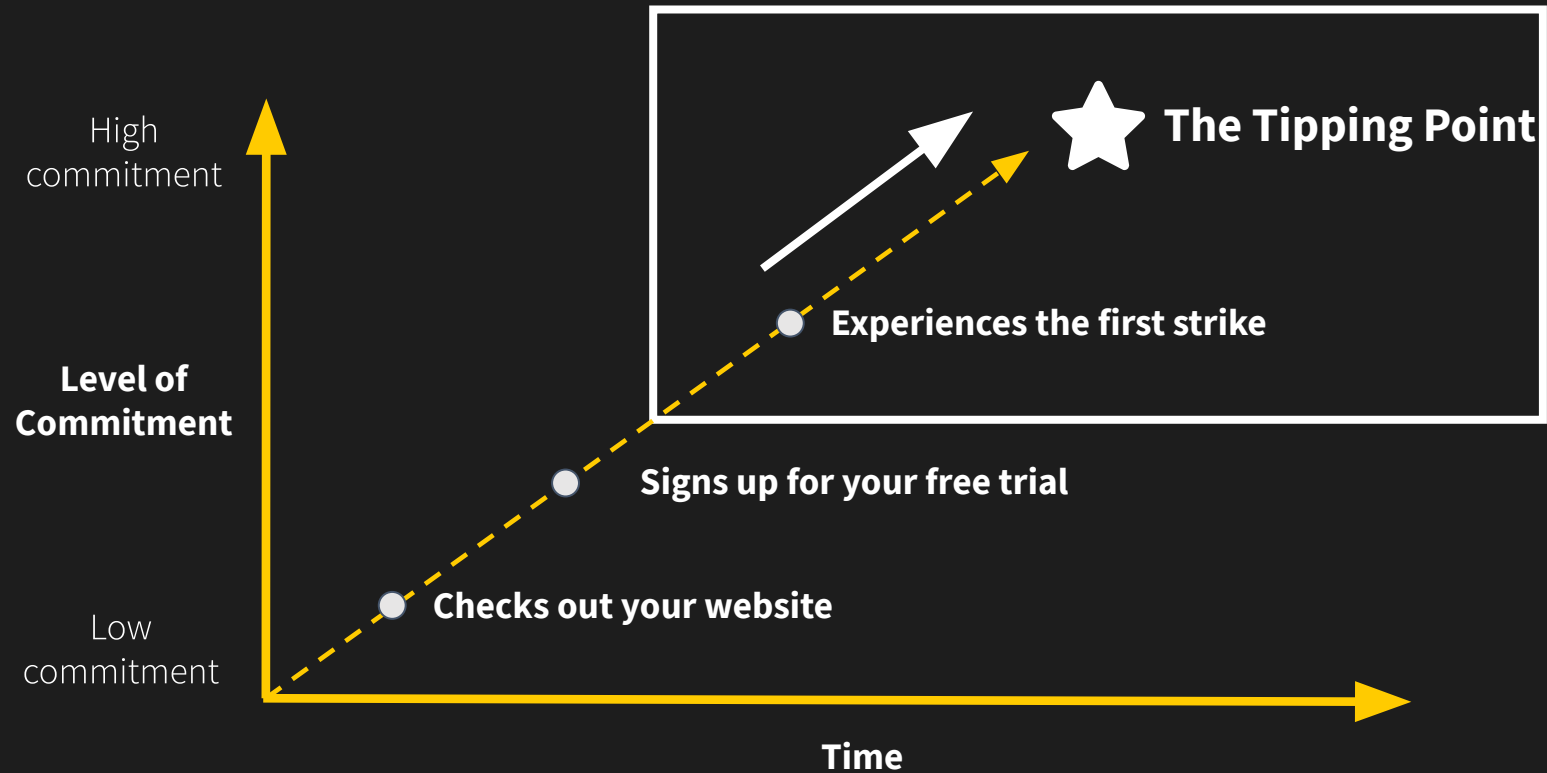


Triggers May Help People Come Back To Your App.

Currently **40-60%** of users who sign up for your application will use it once and never come back, according to Intercom.



Triggers May Help Users Get To The “Tipping Point”.



Recall: Slack's Tipping Point.

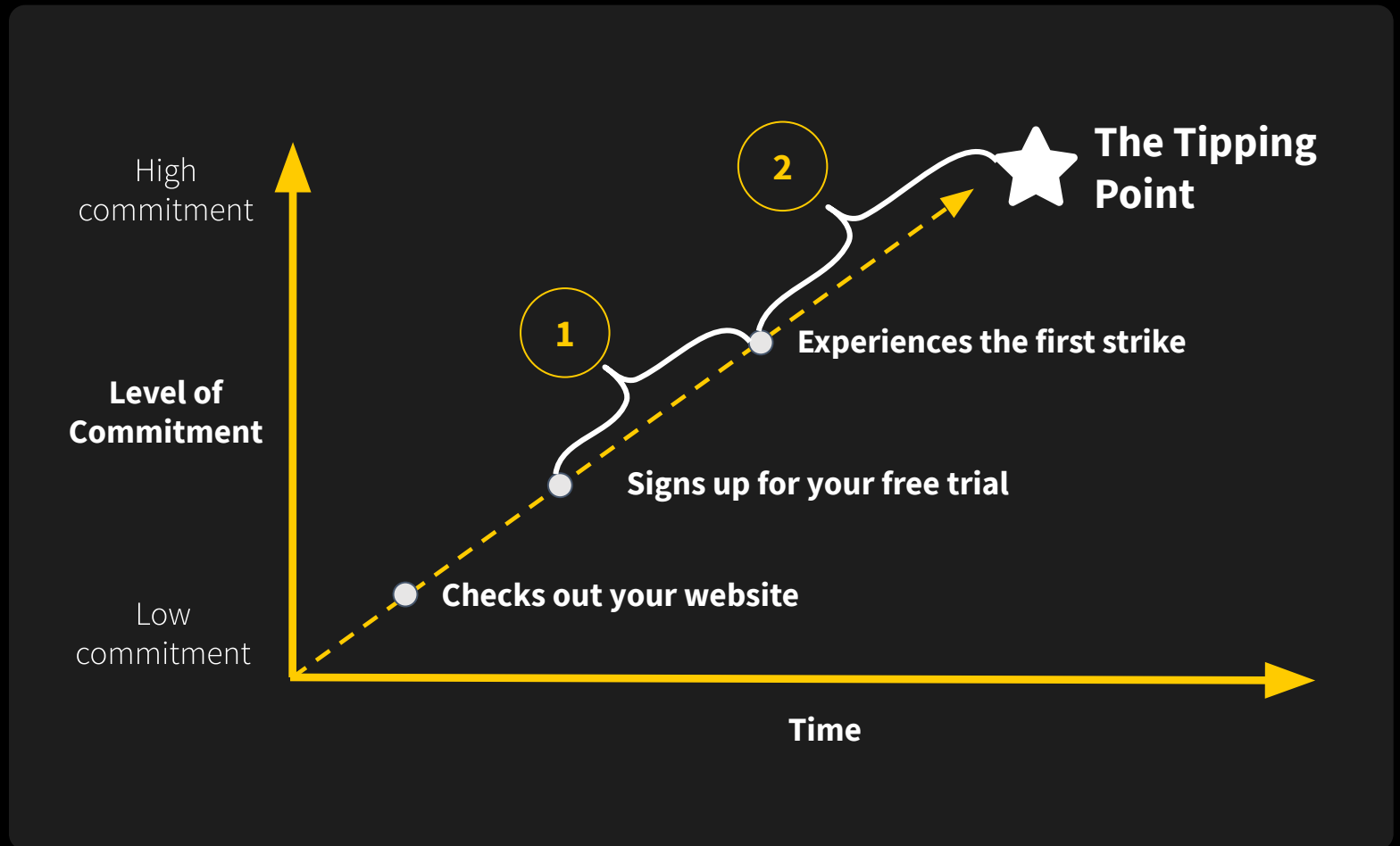


“Based on the experience of which companies stuck with us and which didn't, we decided that **any team that has exchanged 2,000 messages**, 93% of those customers are still using Slack today.”

Stewart Butterfield, CEO & Co-founder of Slack

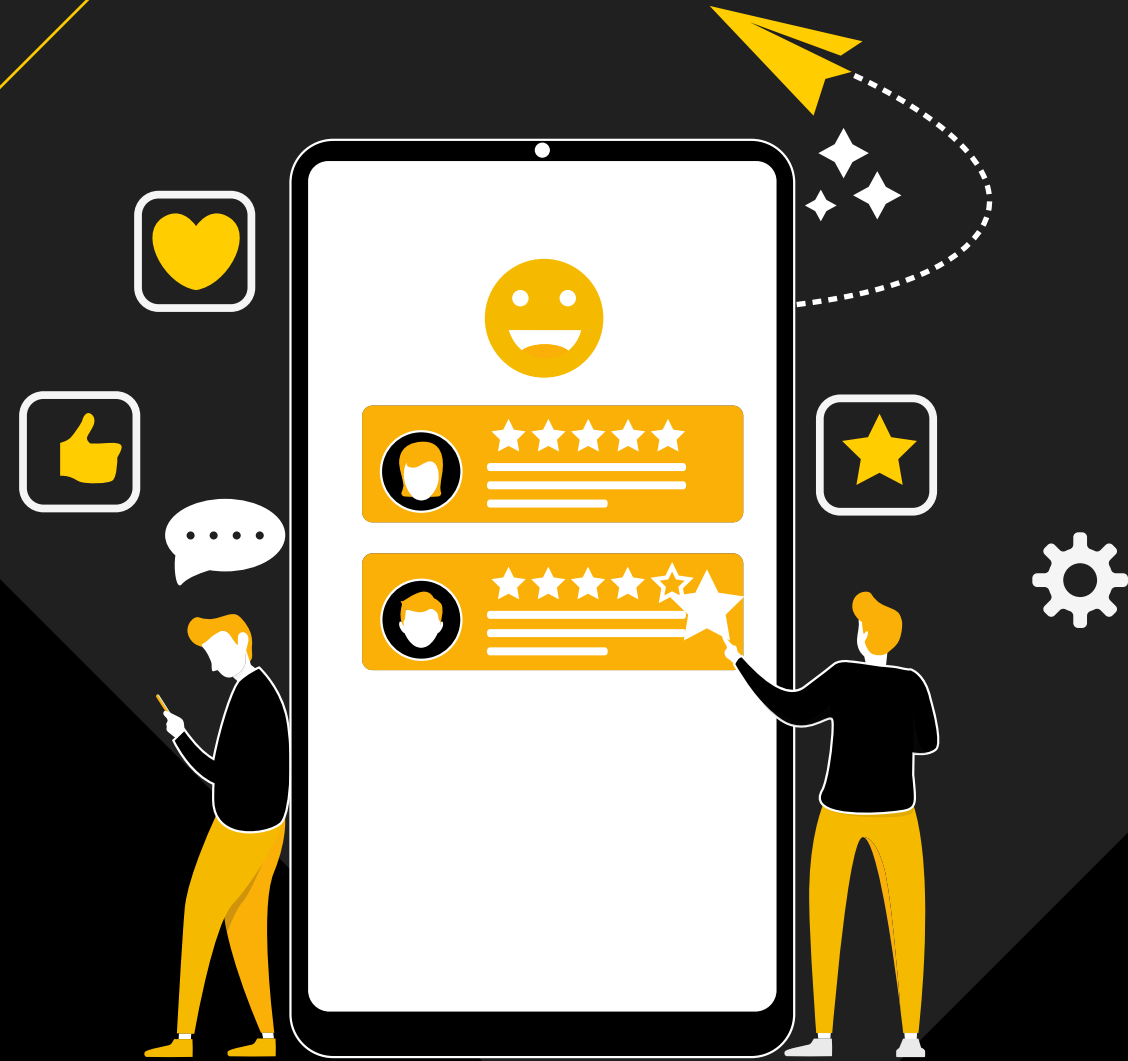
How Conversational Triggers Can Help.

- 1 Get new users to the first strike
- 2 Get users to the tipping point



2

Building A Straight-Line Onboarding Email Strategy.



Examples of Conversational Triggers.



Browser or phone notifications



SMS text messages



In-app messages



Direct mail



Email



**But, Email Is
Dead, Right?!?**





Emails Are Core Components of Onboarding.



It's **accessible** – Most people have at least one email address.



It's **expected** – People expect at least a welcome email.

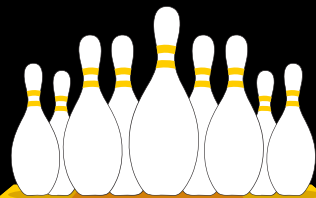


It's **understood** – It's a channel that's been around for years.

How many of you have received a bunch of annoying onboarding emails?



3 Steps To Building A Straight-Line Onboarding Email Strategy.



1



**Segment your
emails by your
Customer Jobs**

2



Create
behavior-based
email flow

3



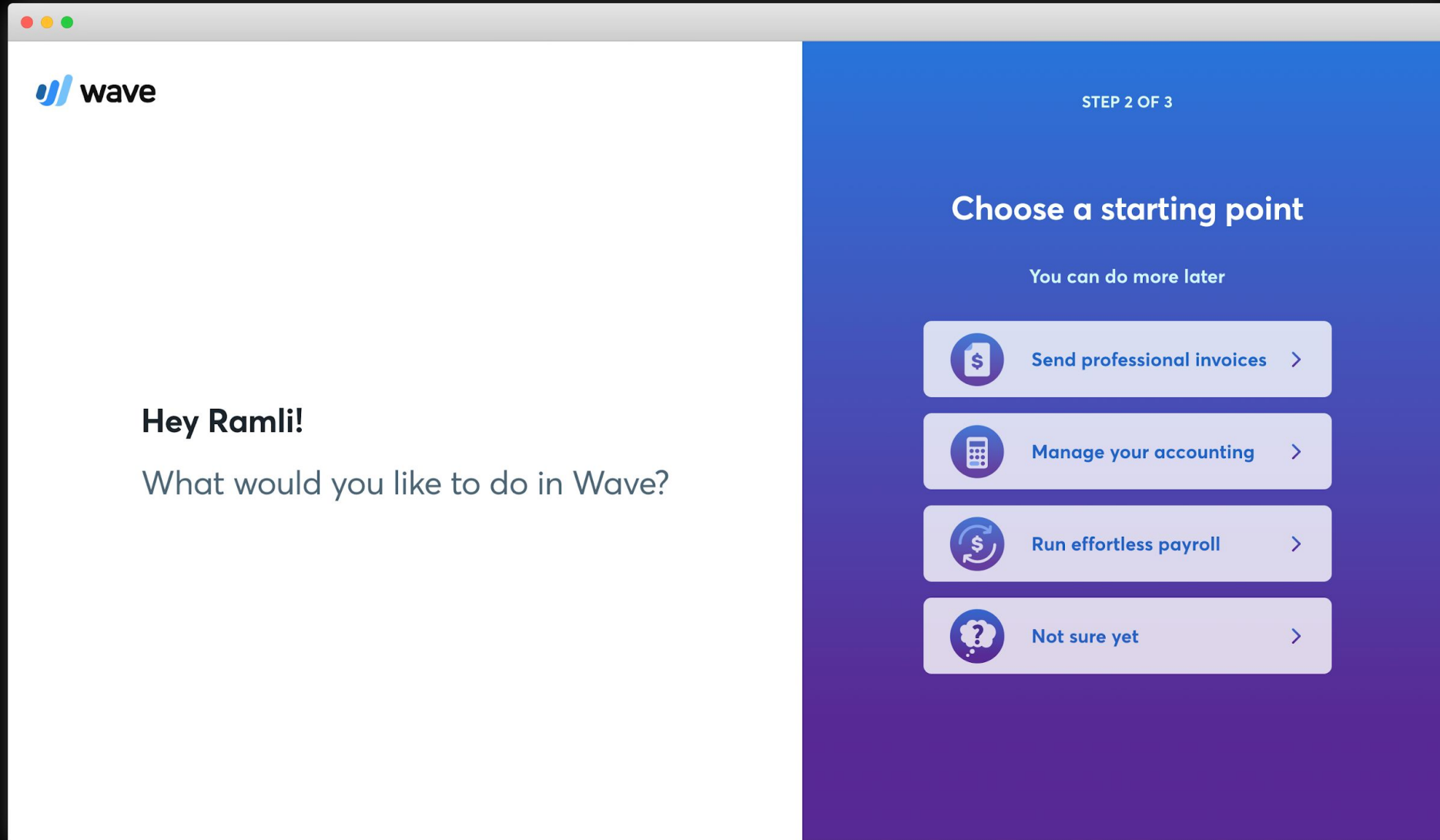
Fill in the details
for each individual
email




Segmented Onboarding Is Conversion Steroids.



How Wave Segments Their New users.



Segmented Product Tours.

 Product-Led Institute

Invoice ready in 3 minutes


1 Customize

Professional templates proven to get you paid.

2 Create

3 Send


4 Add customers



Welcome to effortless invoicing!

Customize just once and make a great impression every time.

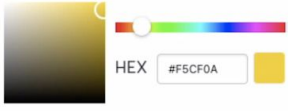
Add your logo



Remove logo

Pick your accent color

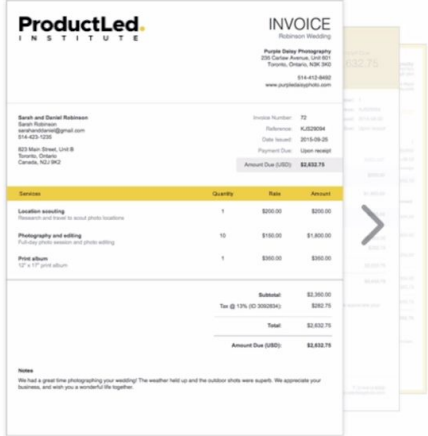
Tip: Drag both circles to change color.



HEX #F5CF0A

You can always change this later

Choose your template




< Dashboard

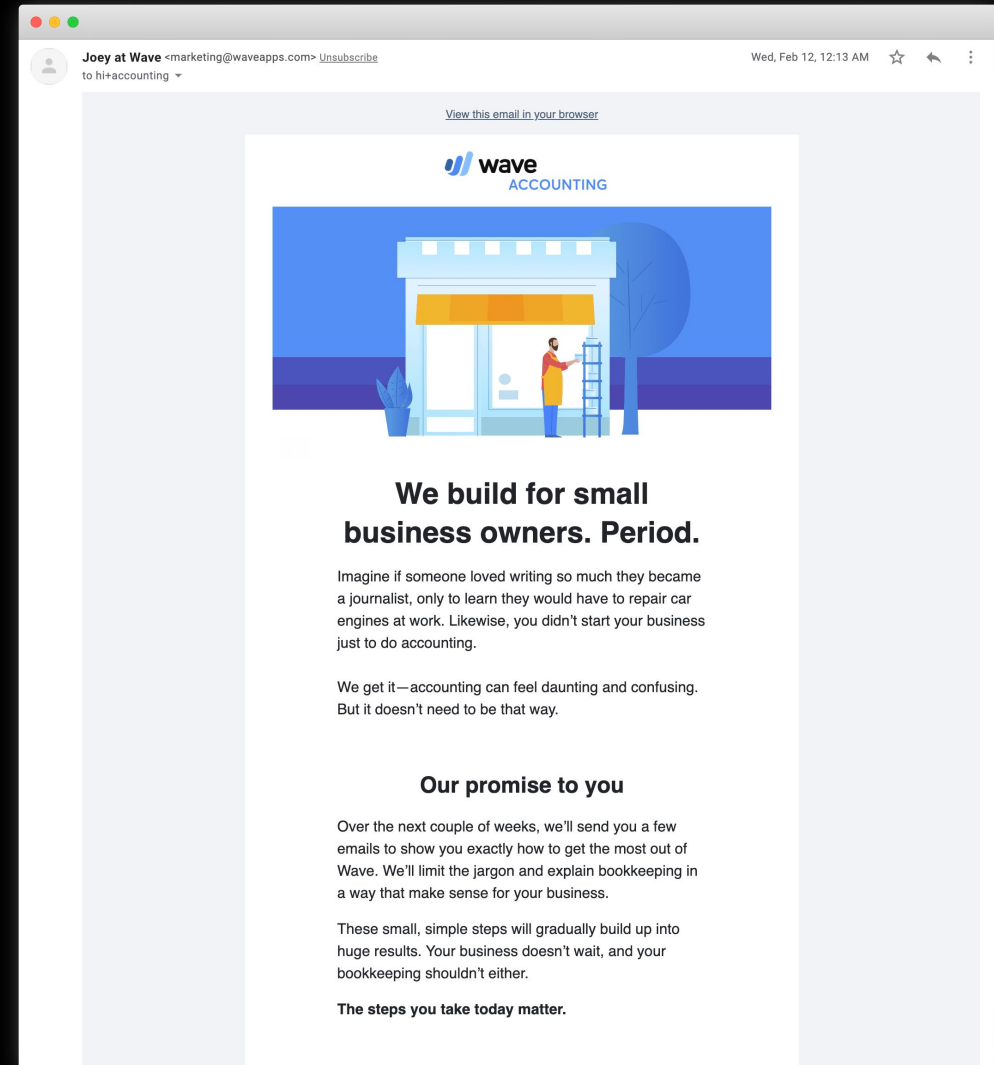
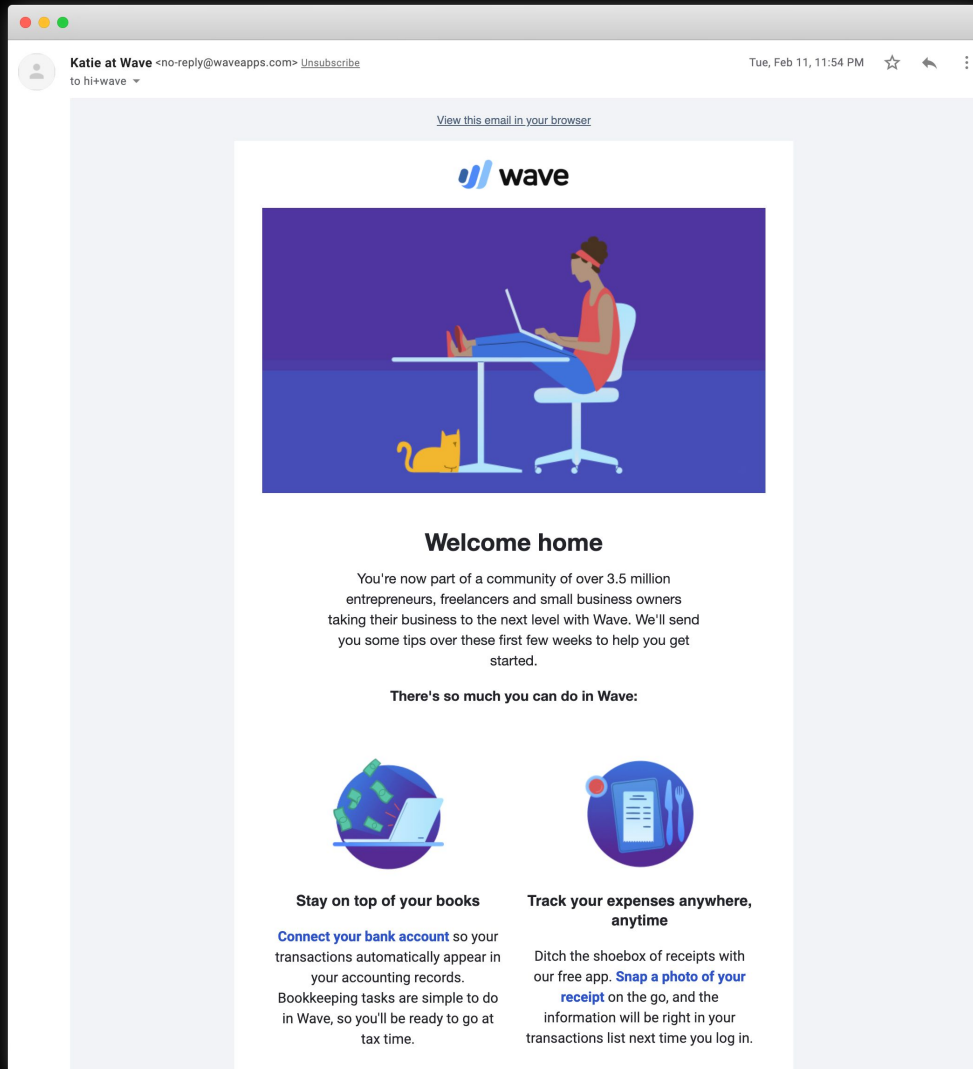
Help

Looks great! >

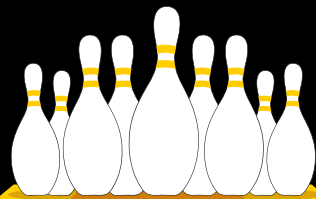
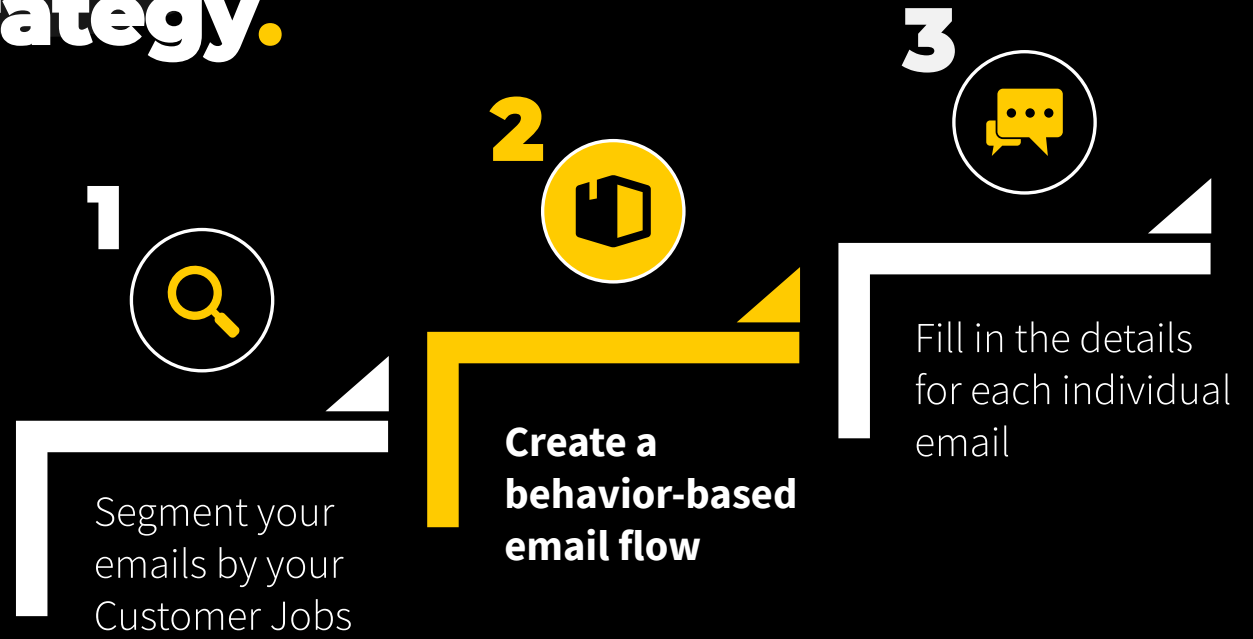
26



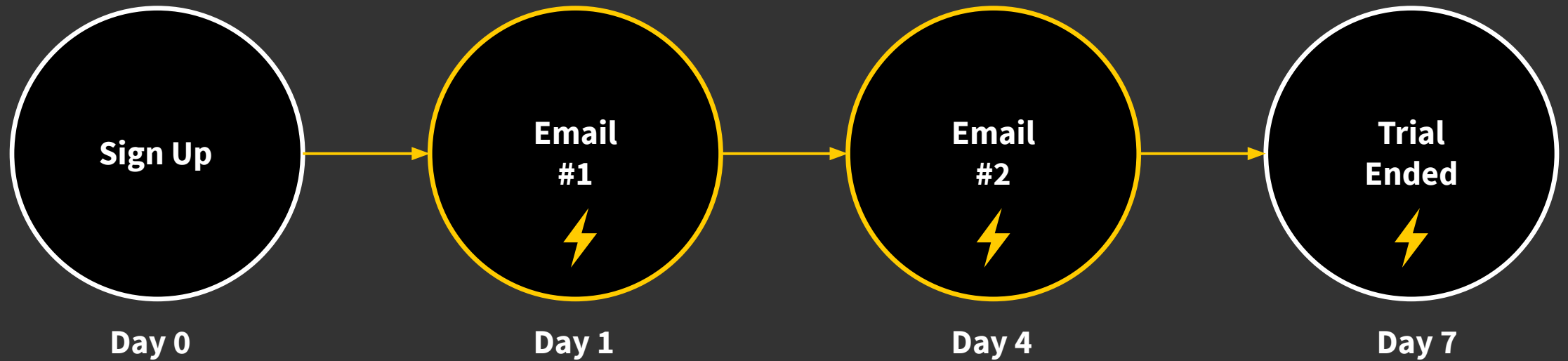
Segmented Onboarding Emails.



3 Steps To Building A Straight-Line Onboarding Email Strategy.






Time-Based Onboarding Emails.

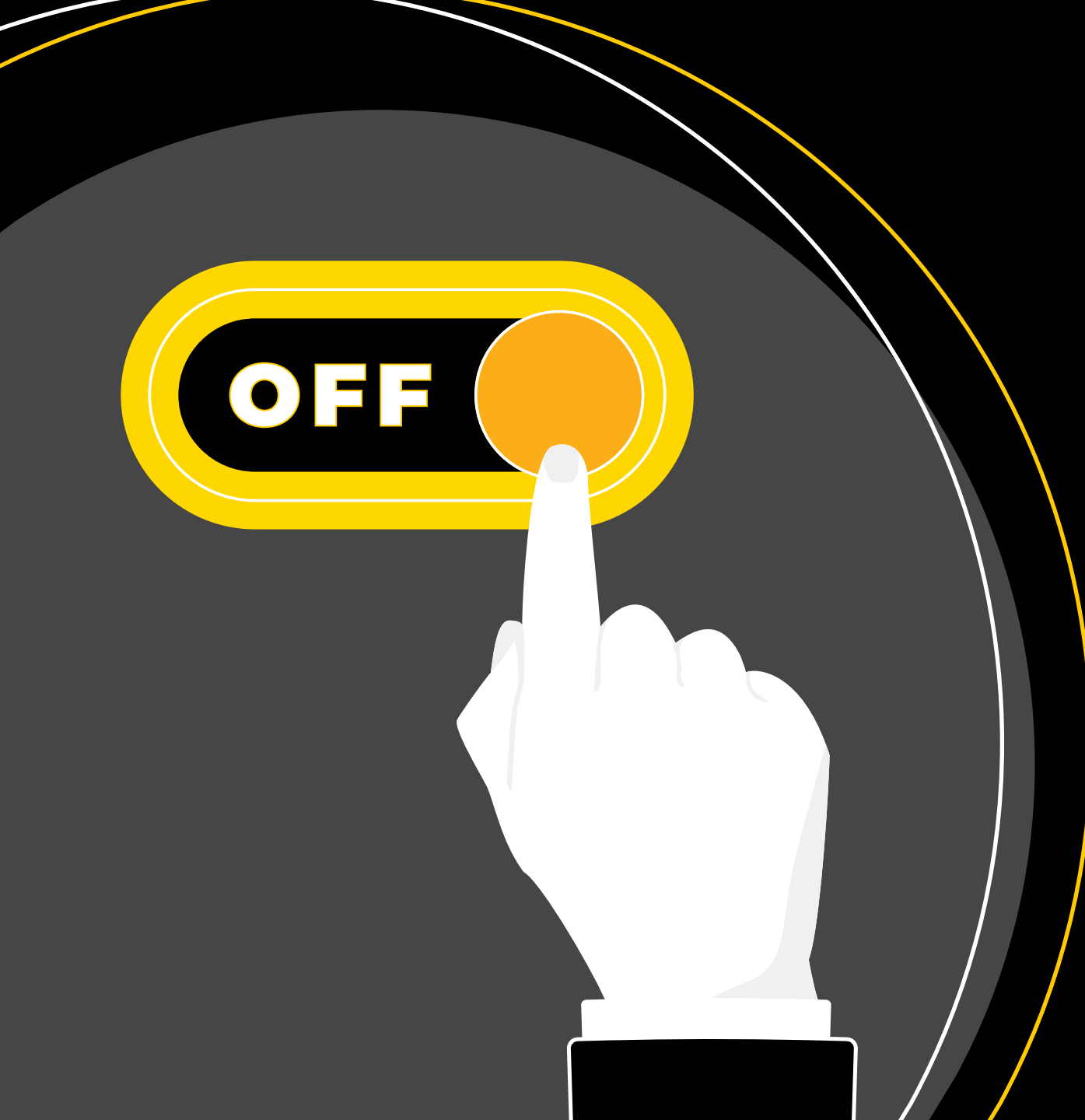


What are the limitations of time-based onboarding emails?



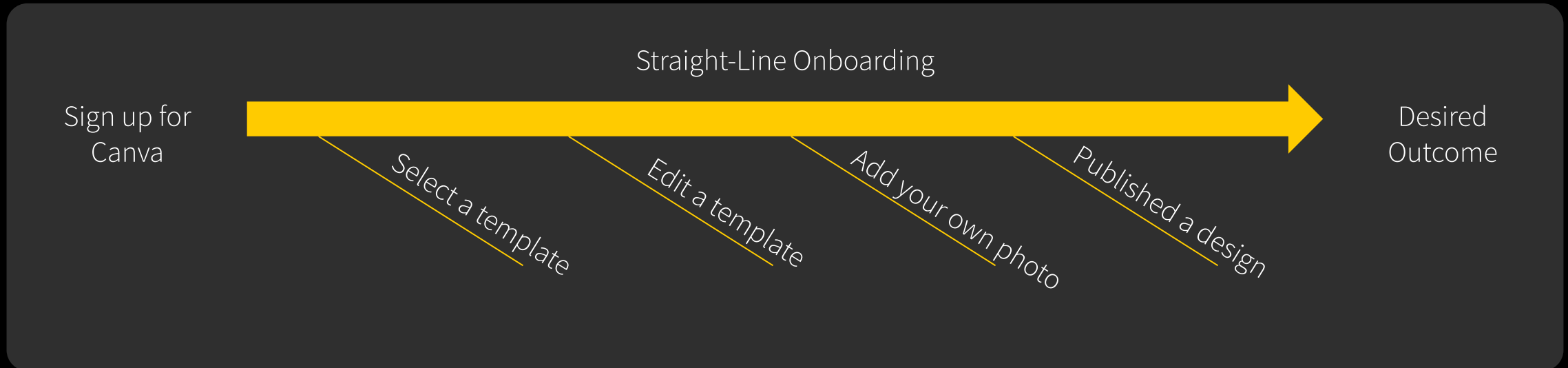
The Problems With Time-Based Emails.

-  Does NOT consider what the user has already done in your product
-  Does NOT personalize the emails to drive users to the next step in the onboarding
-  Does NOT adapt to users needs, anxieties, and challenges



Behavior-based emails interacts with users based on what they have or have not done in your product.

Example: Canva's Straight-Line Onboarding.



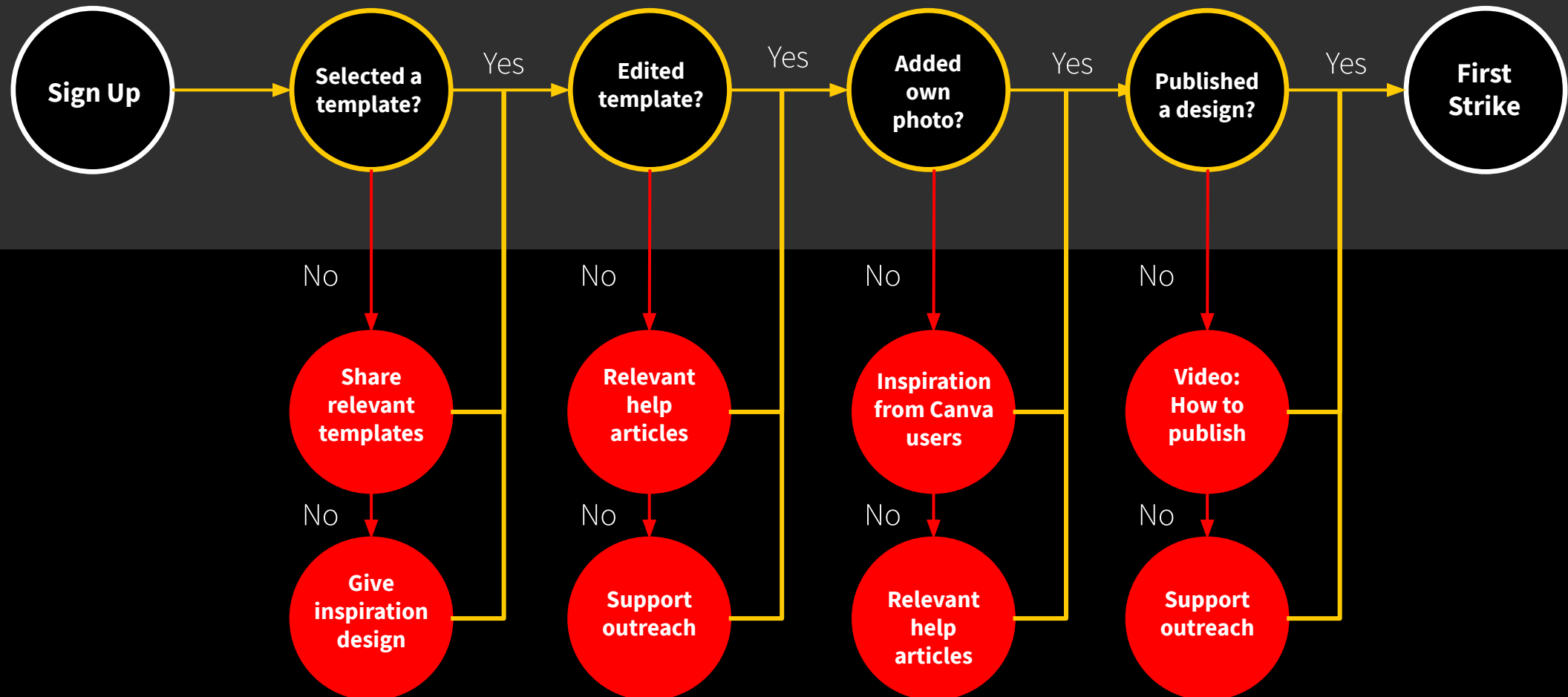
Have they experienced the value of the product yet?



Or are they stuck somewhere in the early stages of the signup process?

Canva's Behavior-Based Email Flow.

Straight-Line Onboarding



Design It In Trello or Notion.

The screenshot shows a Trello board with a light orange background. The board is titled "Canva - Straight-Line Onboarding Emails" and is categorized as "Personal". It features six columns, each representing a step in an onboarding process:

- Sign up**: Contains a card "Welcome Message" and a "+ Add another card" button.
- Select A Template**: Contains cards "Relevant Templates for Persona", "Inspiration Design Round-Up", and "Usage Tip: How To Select A Template", plus a "+ Add another card" button.
- Edit A Template**: Contains cards "Help Article: How To Edit A Template" and "Support Personal Outreach", plus a "+ Add another card" button.
- Add Own Photo**: Contains cards "Inspiration from Canvas Users", "Help Article: How To Add Your Own Photo", and "Support Personal Outreach: Need help adding photos?", plus a "+ Add another card" button.
- Published Design**: Contains cards "Video: How To Publish Designs in Canva" and "Relevant Examples of Finished Designs", plus a "+ Add another card" button.
- First Strike**: Contains a card "Success Email: Congrats On Publishing Your First Design. What's Next?" and a "+ Add another card" button.

The top navigation bar includes the Trello logo, a search bar, and user profile information (RJ). The bottom right corner of the board has a "+ Add" button.

Why Didn't The User Get To The First Strike?



Lack of motivation?

- Amplify the pain
- Re-iterate the value



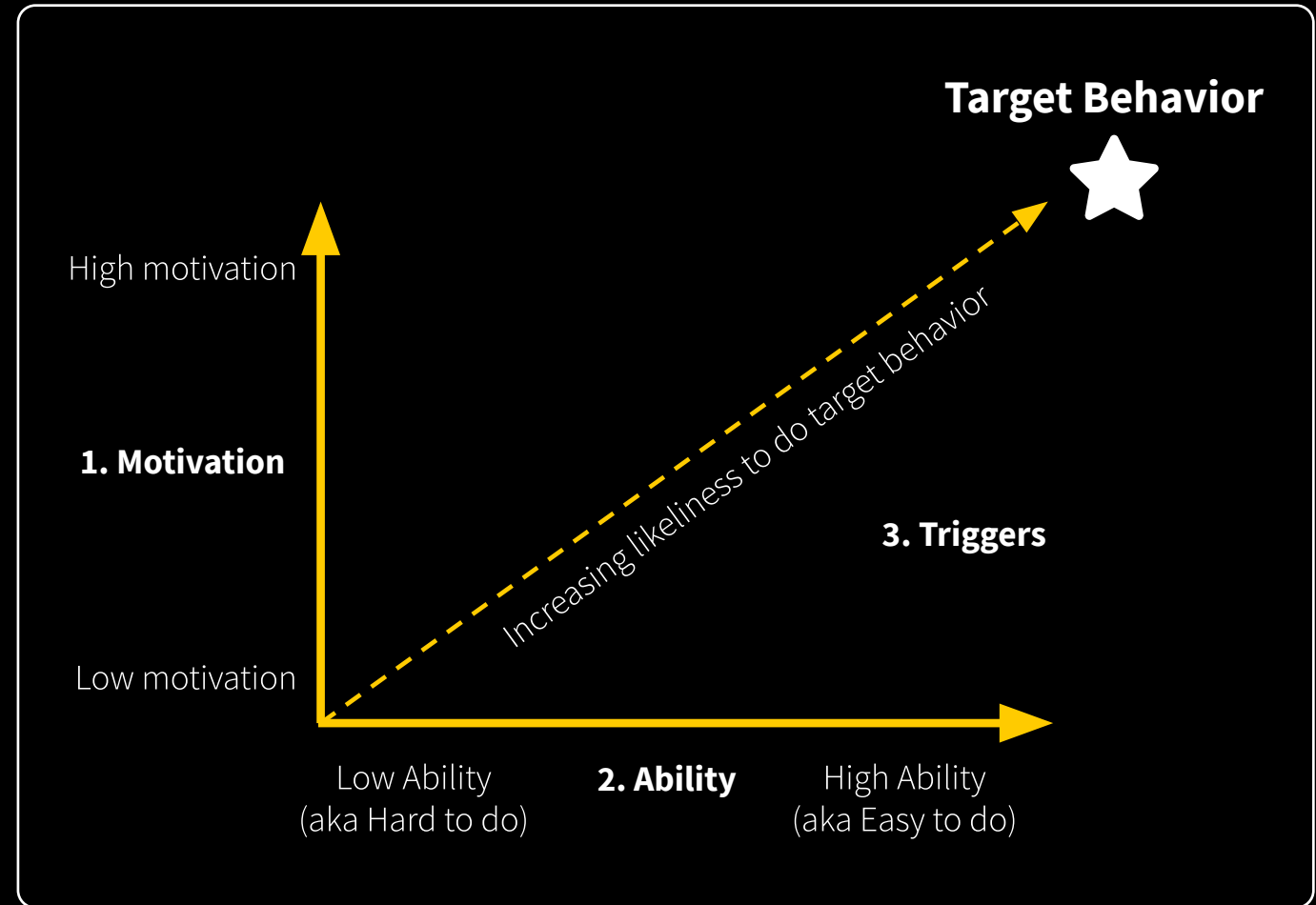
Lack of ability?

- Give them resources/templates
- Ask if they need help



Lack of triggers?

- Experiment with sending more communication



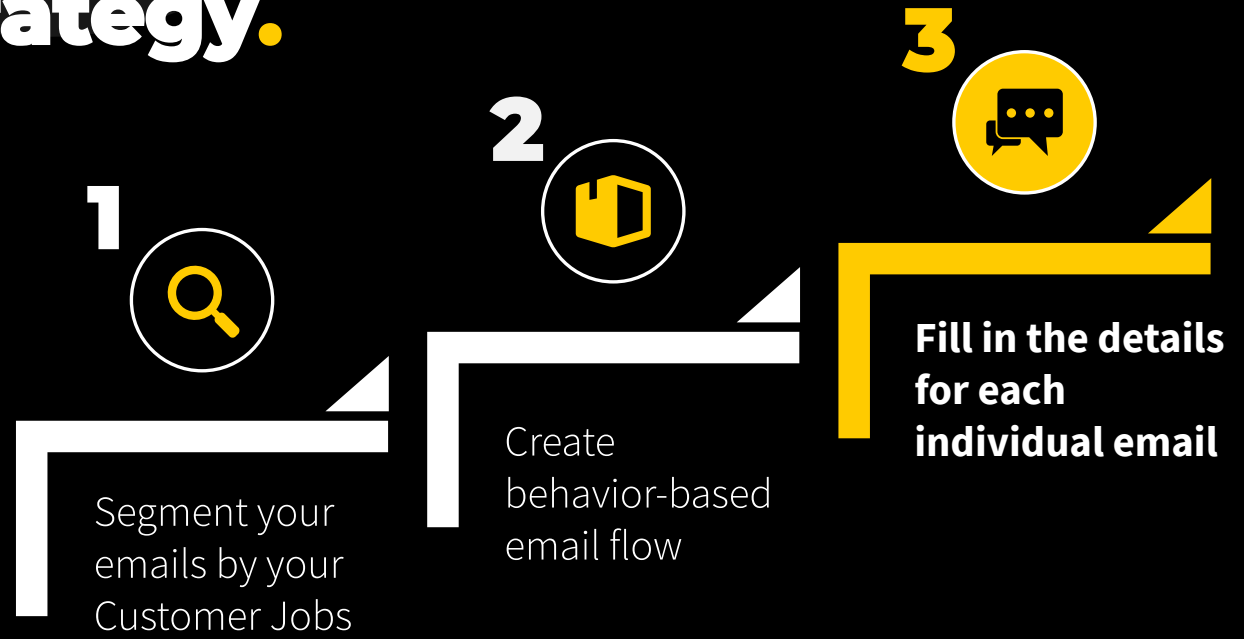
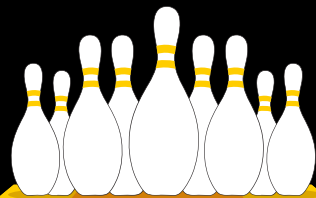
Worksheet.



Complete Educate Your
Users Worksheet



3 Steps To Building A Straight-Line Onboarding Email Strategy.



Common Conversational Bumpers.



Welcome messages



“Better life” messages



Usage tips



Trial expiration warning or extension



Case studies

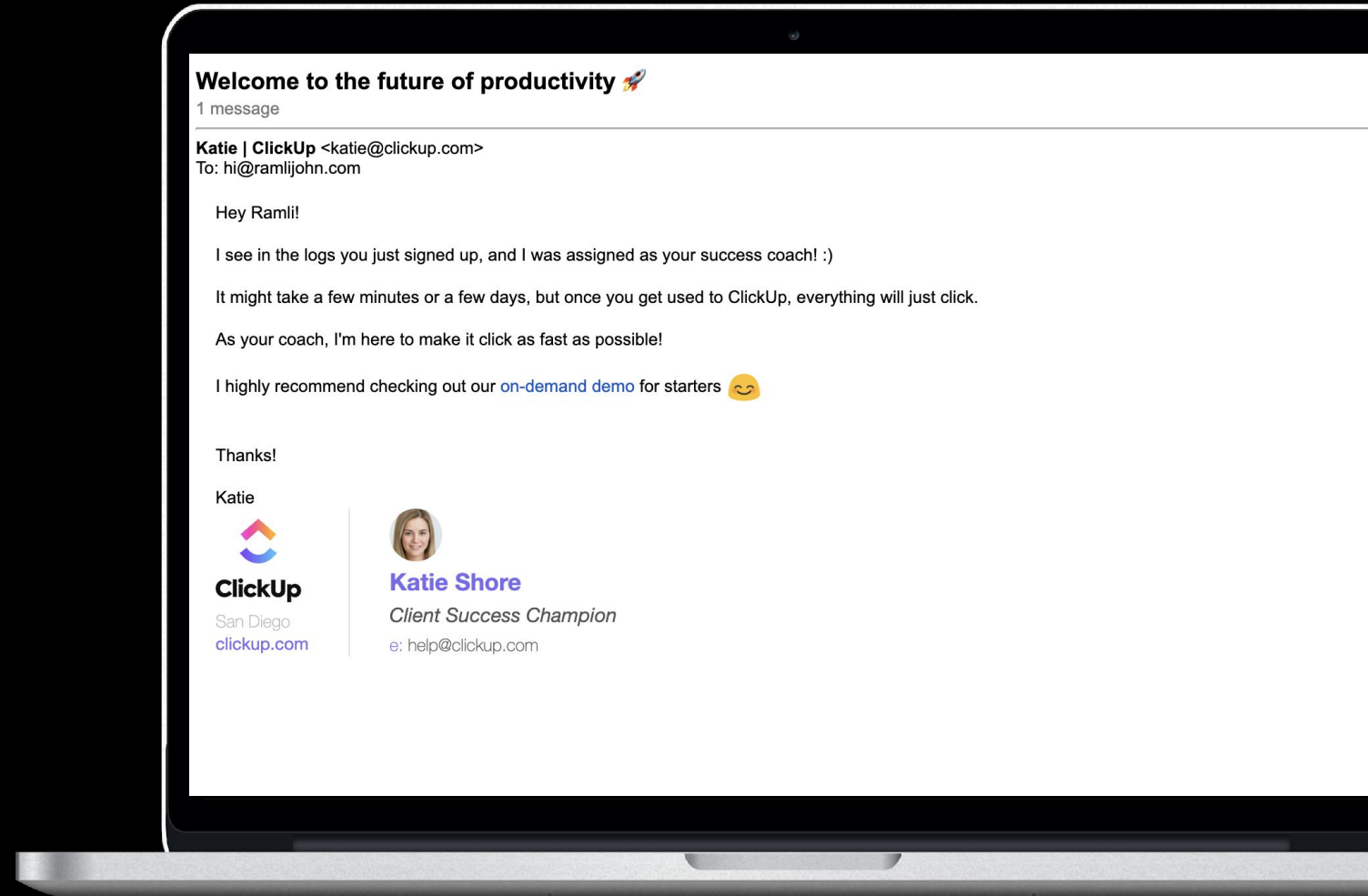


Sales touches

1

Welcome Messages.

New users expect a welcome email. That's why it has typically one of the highest open rates at 60 percent or more.



Welcome Message Tips.



Set the tone for your brand



Reiterate the value of your product



Give them instruction on how to get help

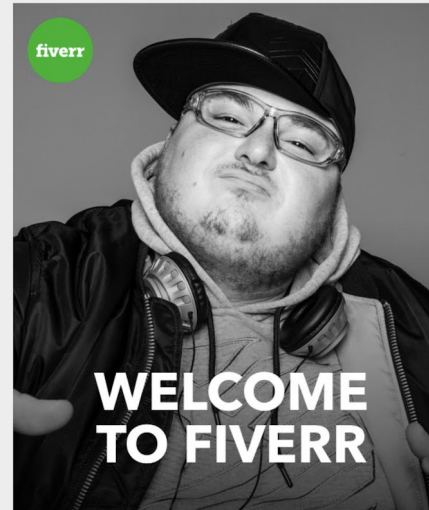


Provide expectations of other emails coming up

Welcome to Fiverr!

1 message

Fiverr <no-reply@fiverr.com>
Reply-To: no-reply@fiverr.com
To: hi@ramiljohn.com



You're now part of a global community of doers. Fiverr is a marketplace of talented online freelancers who pride themselves on getting it done for you. On time. On budget. Get everything from custom websites to fresh original content, stunning graphics and much more.

Get Sh't Done

Explore Top Services



Whiteboard & Explainer



Voice-Over

2

"Better Life" Messages.

Better life messages focus on communicating the functional, emotional, or social job of your product. How will your product make the user's life better?

Unlock your access to the best design tools

1 message

Canva <start@engage.canva.com>
Reply-To: no-reply@canva.com
To: ramli@productled.com



Let us upgrade you to a completely new design experience

Whether you're a full-time graphic designer, or, your boss asks you to design a flyer every now and again, Canva Pro features are specifically designed to save you (and your team) time and effort for every type of design task.

And, we can prove it.



Animator

Static designs are so 2017. With Canva Pro, you can take your presentation, or Instagram post and turn it into an alluring animated GIF or MP4 video. Your weekly meetings will never be the same again.



Reference The User Success Canvas.

User Success Canvas

User segment:

Designed by:

Date:

Version:

3 What do they HEAR?

What do they hear their colleagues say about them?
What do they hear their friends say about them?
What do they hear their customers say about them?

4 Internal and External Motivations

HABITS OF THE PAST
What were habits and beliefs they had to overcome?

PUSH OF THE SITUATION
What were their frustrations with the previous solution?

1 What do they SEE?

What do they see themselves doing?
What desired outcome do they now see realized?
What needs to they have that are now satisfied?
What are things they can do now that they couldn't before?

2 What do they FEEL?

What are emotions they feel after achieving their desired outcome?
What are emotions they avoided feeling after achieving their desired outcome?



Last updated on October 2020. Download a copy at <https://productled.com/user-success-map>

© 2020 ProductLed Inc.

3

Usage Tips.

Usage tips are helpful nudges that direct users to take steps in the product that will set them up for success.

How to upload a photo to your Canva design

1 message

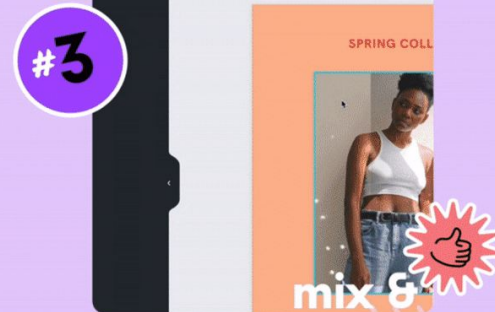
Canva <start@engage.canva.com>
Reply-To: no-reply@canva.com
To: ramli@productled.com



How to upload a photo

It's easy to make your designs more personal by uploading your own photos. There are simple ways to do it no matter what device you're on.

1. Select the Uploads tab in the side panel of the Canva editor, click 'Upload an image or video', then choose a file from your device.
2. Drag and drop an image from your computer to the editor to add it instantly. You'll see it automatically added to your Uploads library in case you need it for another design.
3. If you're using the Canva mobile app, you can upload media directly from your camera roll.

[Try it now](#)

**What usage
tips could you
give for your
product?**



4

Trial expiration warning.

Usage tips are helpful nudges that direct users to take steps in the product that will set them up for success.

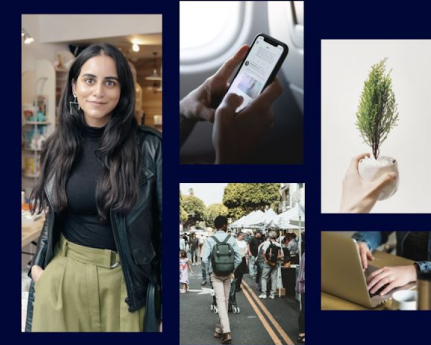
Your free trial is ending in 3 days

1 message

Shopify <email@email.shopify.com>

Reply-To: Shopify <reply-fe9311747161047a76-6372_HTML-125635044-7209406-30608@email.shopify.com>

To: hi+2@ramlijohn.com

[Log in](#)

**There's so much potential
in ramlijohn.com store**

Keep the progress going

Pick a plan and take your time to work on your store to set it up right. Feeling stuck? Check out our [setup guide](#) which outlines all the steps you need to get started with Shopify.

[Choose a plan](#)

Trial Extension.

Ask your users if they want a trial extension. You'd be surprised how many request it and end up becoming paying customers.

Keep your store open with a complimentary extension

1 message

Shopify <email@email.shopify.com>
Reply-To: Shopify <reply-fe921178746d047f71-6372_HTML-135508335-7209406-4302@email.shopify.com>
To: hi+10@ramlijohn.com

[Log in](#)

Extend your trial

Hi Ramli,

Your Shopify trial ended a few days ago and your store is now paused.

We get it, building a business can be challenging! If you would like more time to work on your store, you can extend your free trial for an extra 7 days.

[Extend your trial](#)

5

Case Studies.

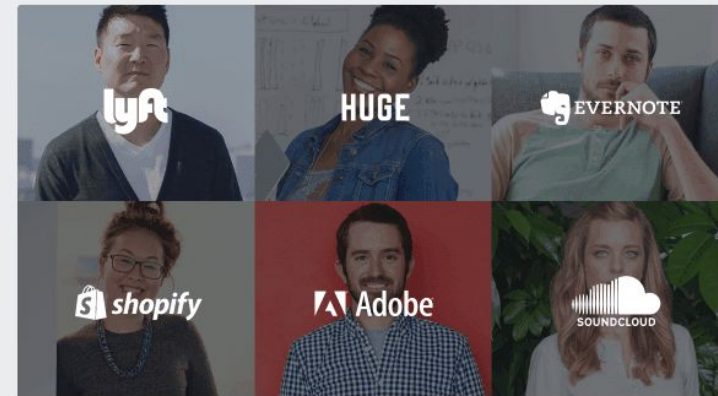
Share customer success stories to your users to inspire them to continue using your product and becoming a paying customer. Share stories to overcome objections.

Meet some other genius designers who use InVision



You're in good company

Tons of talented designers use InVision every day. Here's your chance to meet them.



Every Inside Design gives you a sneak peek at how design works at amazing companies. Discover how other designers work, get inspired, and build the amazing tools we use every day.

TAKE A SNEAK PEEK

5

Sales Touches.

Sales touches are when sales or customer success reaches out to users. These can be automated or manual emails.



When is the best time to send sales touches?

Uncover hidden marketing opportunities

1 message

Rand Fishkin <rand@sparktoro.com>
Reply-To: Rand Fishkin <rand@sparktoro.com>
To: hi@ramlijohn.com

Hi Ramli,

The hard part is over now that you've customized your SparkToro profile. Were you left with any questions? I'd love to answer them. Here are some other things you can do with SparkToro:

- ID publications & people that truly reach your customers
- Craft more targeted pitches
- Build smarter personas
- Find more targeted paid ad opportunities
- Spot the social accounts that drive more engagement

Don't miss out: check out [suggestions for your first 10, free searches](#) and start driving more targeted growth.

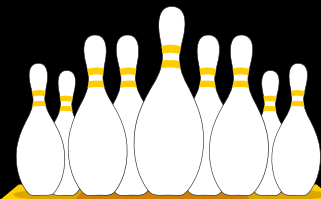
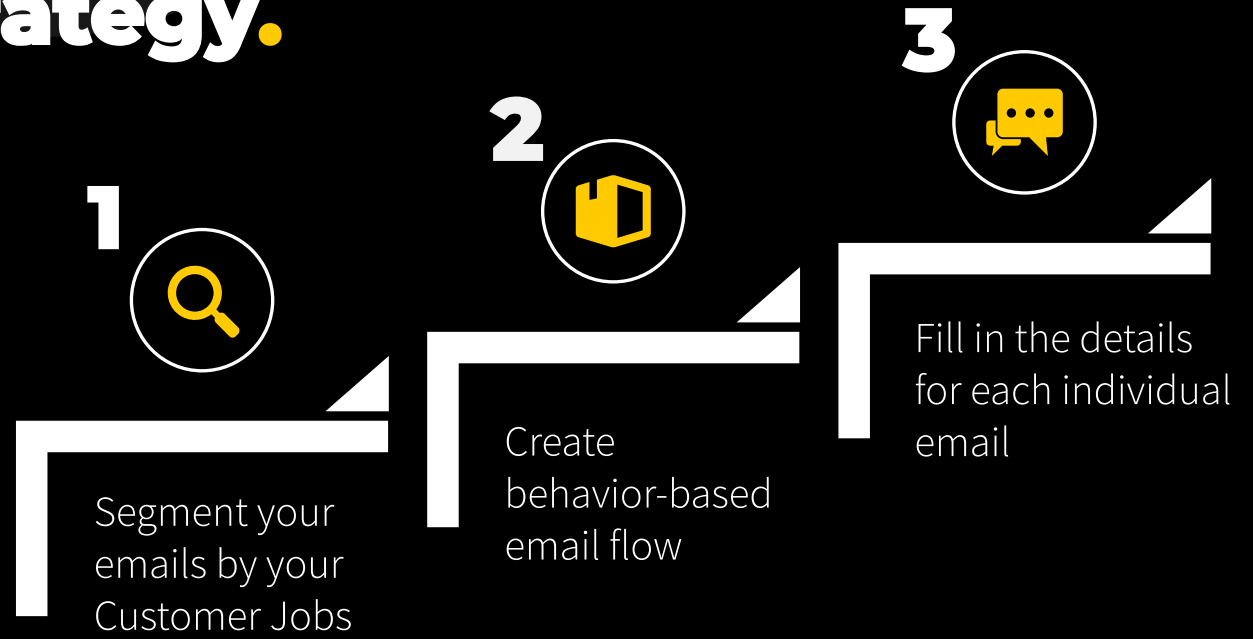
All the best,
Rand Fishkin

p.s. This is my personal email, so after you've had a look, would love if you'd hit reply and share any feedback

Unsubscribe hi@ramlijohn.com from this list.

Sparktoro 5820 6th Avenue NW Seattle, Wa 98107 USA

3 Steps To Building A Straight-Line Onboarding Email Strategy.



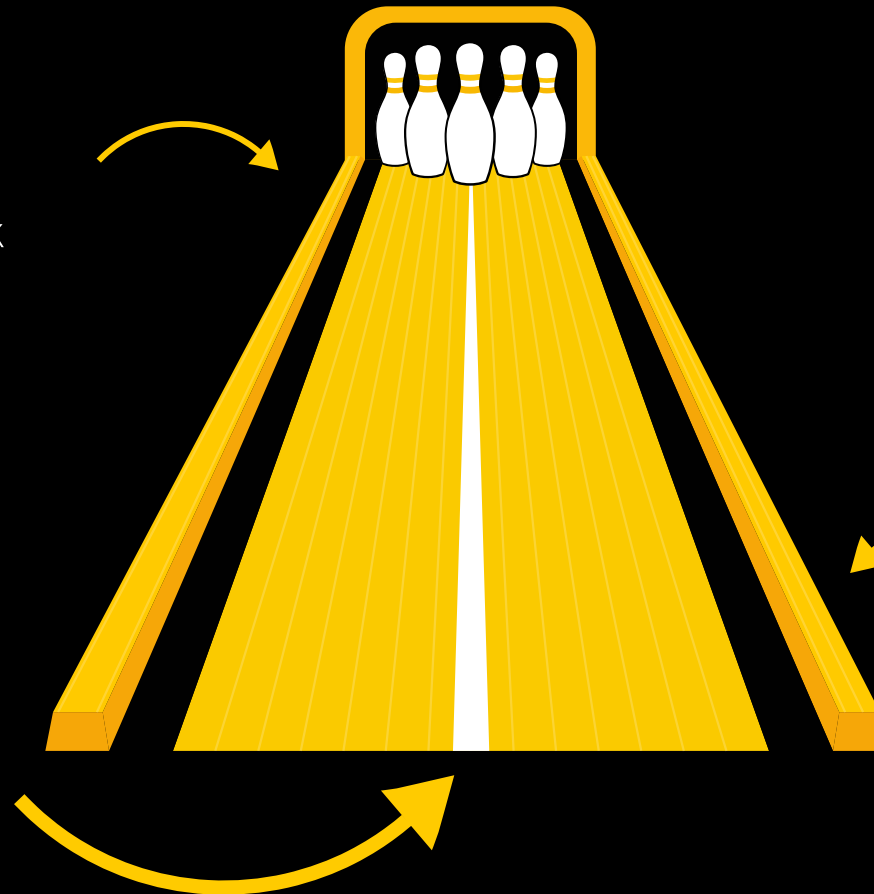
Recap.

Conversational Bumper

Use prompts such as email and SMS to bring users back to the product.

Straight-Line Onboarding

Contains the absolute minimum number of required steps for a user to experience value.



Product Bumper

Shows the user what to do within the product using helpful tooltips



This Week's Challenge.



Fill out “Educate Your Users” worksheet in the learning portal



Share this with your onboarding team and get feedback from them.



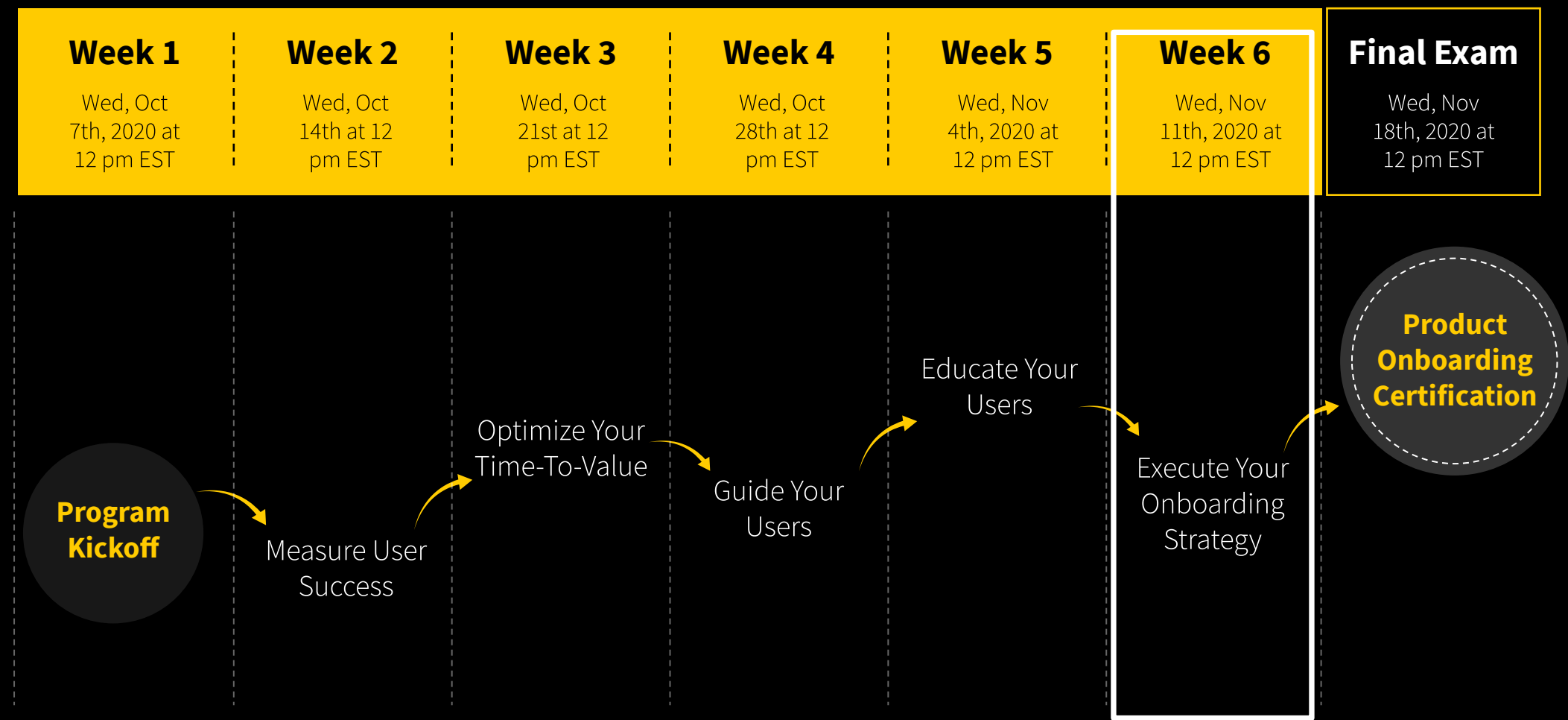
Sign up for at least three products this week. Share conversational bumpers you like in our Slack group and create a swipe file.

Q&A.



Product Onboarding Certificate Roadmap.

What's in store for next week



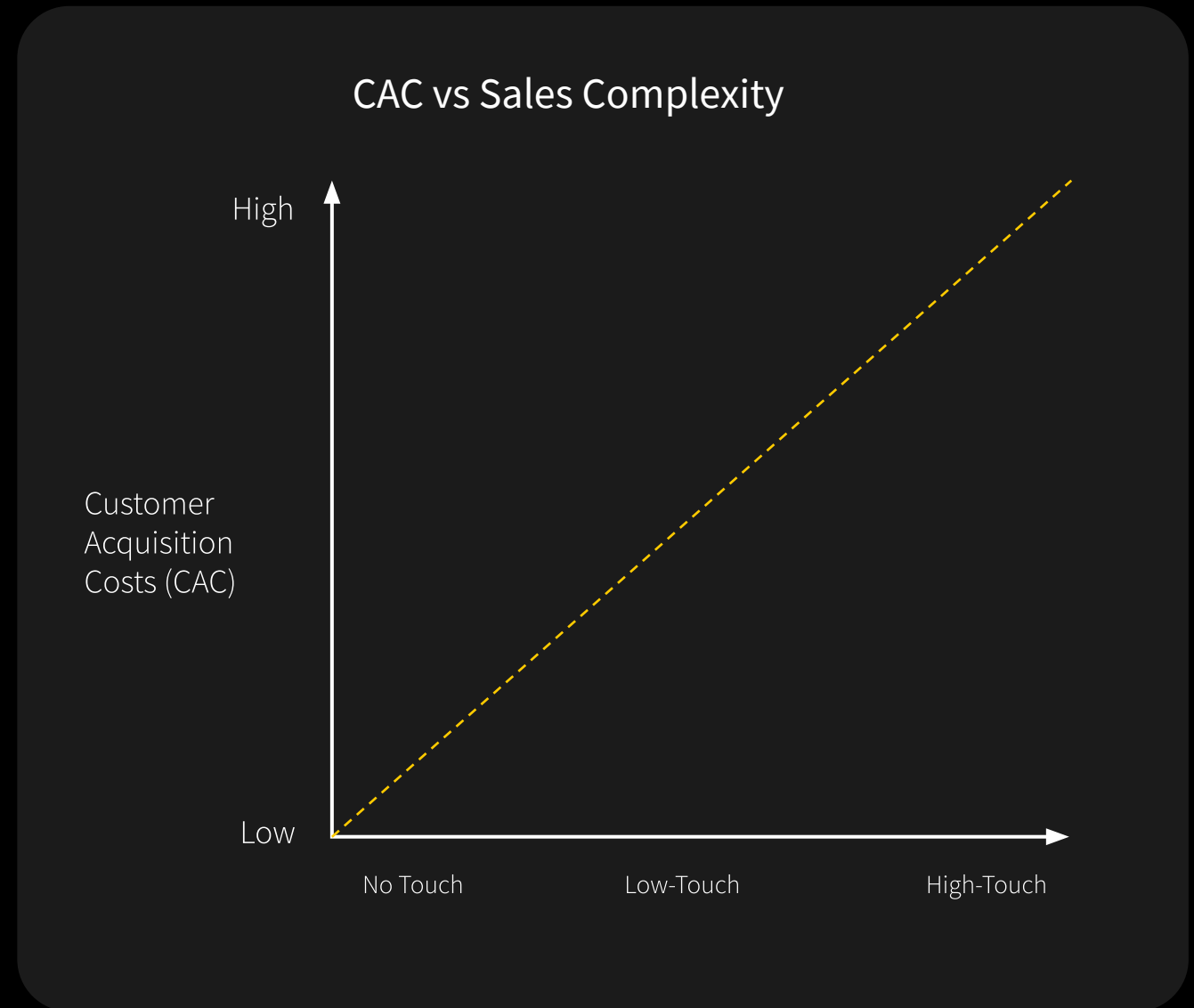
Complete Guide Your Users Worksheet.



**When do you think
it make sense for
sales to reach out?**



Three Ways You Can Help Your Users ●





**Bumpers Need To Add
Value, Not Friction .**

Seed Questions To Ask Before Class •



- ① When should sales interact with users?
- ② What does a world-class product experience feel like?
- ③ What ways can you guide your users within the product?

Seed Questions To Ask Before Class •



- ❓ Do you currently monitor what percentage of signups experience the value of your product?
- ❓ Should sales reach out to new users? If so, when should they reach out?

What Users Are You Most Familiar With?

