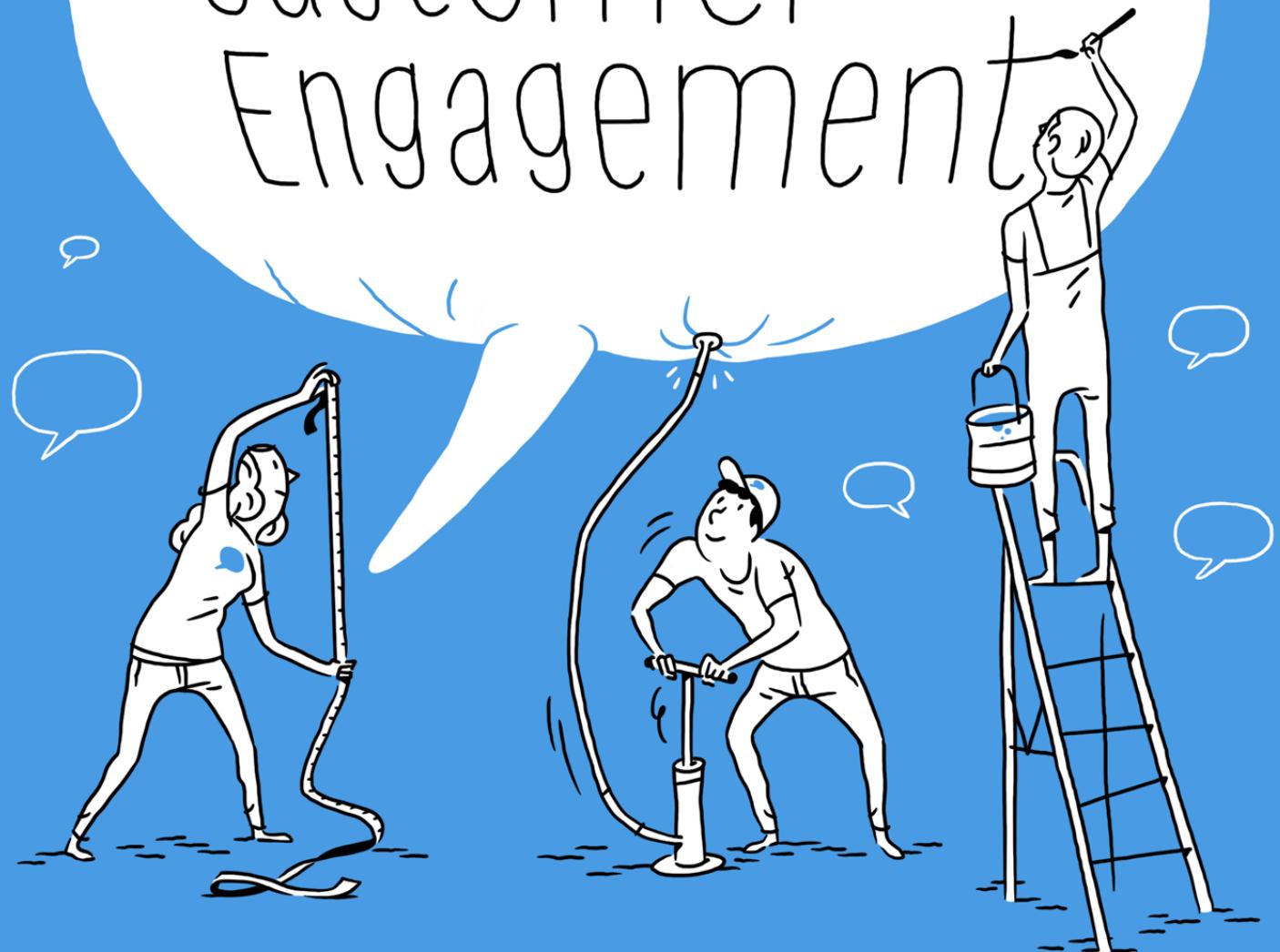


Intercom on Customer Engagement



How to craft the right message
for the right users at the right time

Intercom on Customer Engagement

Sharing what we've learned about communicating with customers at scale, while still keeping it authentic and personal.

Our software enables internet businesses to see who is using their product, and makes it easy to communicate with customers and users, through email and in-app messages. [Find out more.](#)

We regularly share our thoughts on customer success, product management, design, startups, and the business of software at [blog.intercom.io](#).

Thanks to Sara Yin for the end-of-chapter quizzes and keeping us on track with getting this book produced.

Cover and chapter illustrations: Quentin Vijoux

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We'll spare you the legal mumbo jumbo. But please don't share this book or rip off any content or imagery in it without giving us appropriate credit and a link.

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FOREWORD BY DES TRAYNOR

Sending the right users, the right message, in the right way, at the right time

An effective messaging strategy is the bedrock upon which you can build customer engagement. Unless your customers value what you say, any attempt to persuade, educate, or motivate them to use your product will likely fail. They will either mentally or literally unsubscribe from you, and you'll lose the opportunity to engage them in any way.

People are forever asking us questions like “how often should I message my users?”, but there is no one-size-fits-all answer. One poorly-targeted email is one too many. Two well written, highly relevant mails every week might leave your customers wanting more. It’s all about who you’re speaking to, what you’re saying, and when you’re saying it.

At Intercom, we believe personalized messaging is and will remain the most effective type of messaging, and that’s core to our mission of making web business personal. We believe targeted, appropriate messages are a huge component in hastening this shift. But communicating authentically at scale is not without its challenges. A killer subject line is no longer enough for your message to avoid being archived or deleted on sight. So how can you maximize the chances that your emails, in-app messages or notifications will be seen, read, and acted upon? This book guides you through the process of sending the right users, the right message, in the right way, at the right time.

While we view the world through the lens of Intercom’s capabilities, this

book is much more about a way of thinking through, targeting, and writing a message, and not about product specific workflows, Intercom or otherwise. It will help you send better messages that will increase engagement with your customers, regardless of the products that send them.

Customer engagement is one of the topics our blog, [Inside Intercom](#), is known for. This book draws on a few of the posts we've shared there, but has largely been written from scratch. It is based on the lessons we've learned from communicating with the user base of a rapidly growing startup.

Chapter 1 covers defining the audience for your message by segmenting users according to behavior and action.

Chapter 2 discusses crafting your message for maximum impact; what voice, tone, format, and language to use.

Chapter 3 covers the right way and the right time for a message; what you can do to ensure it is received in the most appropriate setting and in the most appropriate context.

- Des Traynor, Co-founder of Intercom

Ask the right customers the right questions the right way at the right time

WHO	WHAT	HOW	WHEN
New sign-ups	Was everything clear during sign-up?	Email	Right after sign-up
1 year+ customers	How could teamwork be improved?	In-app message	One week after inviting teammates
Small customers	Do they accomplish their tasks quickly?	Push notification	When generating a report
Big customers	Why did they switch?	Survey	After they log out
Heavy users of reports	How should Reports be improved?		When they return after 14+ days
Returning after long inactivity	Why did they stop using the product?		Anytime

Every message needs a goal

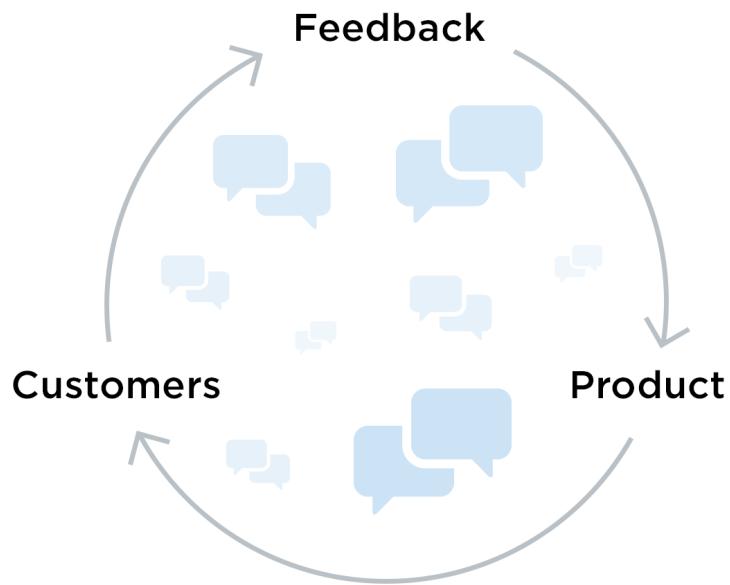
You can't communicate well without a stated goal. The first question you have to ask yourself is, what are you trying to achieve with your message? How will you know the message has been successful?

This isn't about open rates or even click-through rates; those are valid intermediate steps but they're never the final goal. Don't obsess about the stats that dictate how users interact with your message. Instead you should be thinking about the change you are trying to elicit in your users. Is it more frequent usage of your product? Is it to get them to update their billing details? Do you want them to try out a new feature?

Getting recipients of a message to open it and click on a link is tough. This is why there's always the temptation to game the system with subject lines and copy that generate clicks rather than communicate clearly. But there's a law of diminishing returns with those kind of growth-hacking tricks and the effectiveness of your messaging will ultimately decline as customers start to see through them. And taken too far, such tactics will lead you astray. For example, add the words "Win a Free Apple Watch" to your subject lines and watch your open rates double, but there'll be no significant change in behavior aside from recipient disappointment, which you likely don't have a metric for.

Instead you should be laser-focused on the goals of your messages and how you can achieve them. Let's consider some different scenarios where you want to message users and the goals those messages might have.

Survey, quiz, research, or question



You might think the goal of telling people about your survey or quiz is to get them to fill it out or answer it. But again that's only an intermediate goal.

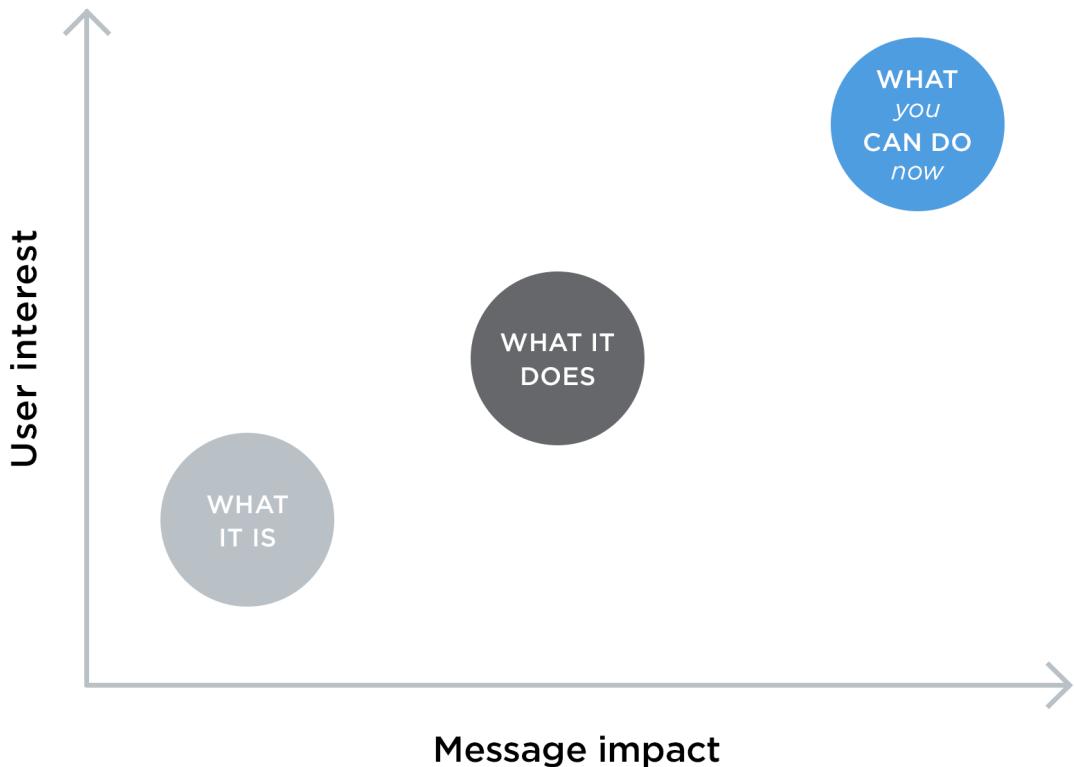
What you are actually trying to do is gather data that will inform or drive changes you are considering in your product or business. It's not about getting "more answers", just like it's not about gaming open rates. If you're going to base significant business or product changes on this data,

you want to make sure it's good quality data. When and where people receive the message will have a significant bearing on the quality and quantity of responses you receive. And [who is giving you the response](#) should have a significant impact on how much weight you give those responses.

Onboarding and engagement

The goal here is to get your users to experience getting value from your product, or a specific part of your product. In a lot of these cases you are talking about users who are trying your product for free but who you hope that after two weeks, a month or a quarter will convert to paying customers. In the SaaS world the only contact you have with these customers may be messages that you send during this free trial period so it's essential you make those messages count. An often overlooked strategy is (1) asking users what they are trying to achieve with your product (2) tailoring your messaging for the different types of user goals. It's the [low hanging fruit](#) of onboarding.

New product improvement



This might seem to have a very similar goal to onboarding or re-engagement but there is a very important distinction which will inform your messaging. In this case you are trying to get people to try something brand new that they haven't seen before. You need to explain how they will benefit from using it, not the great lengths you have gone to in order to build it.

The two most common goals in this scenario are:

1. Increase the adoption rate for your product i.e. get more people to use it.

2. Increase the frequency i.e. get people to use it more often.

Most of the work you do in communicating with customers will fall into the buckets of “*get people to start using a new feature*”, “*get more people using a feature*” or “*get people using a feature more*”. Each have a different metric for success, and as always until you know what you’re shooting for, you’ll struggle to hit the target.

Announcement

In this context we are using the term announcement to cover things like scheduled downtime or maintenance, account changes, billing updates or changes to your terms and conditions. These messages can be fairly prosaic in tone but can be extremely important for your users. You have to ensure these messages have been received and that users understand the implications for them. It’s also essential they know what action, if any, is required and who to contact if they need any help. In these scenarios it’s much safer to be clear rather than clever.

Newsletter, roundup or update

This is probably the most debatable one. Everyone agrees there are many “soft” benefits to regular communications with potential and current users, customers, leads, former users and those who might just be interested in your business or the content you produce. But it can be more difficult to agree on what the “harder” goals of these messages are.

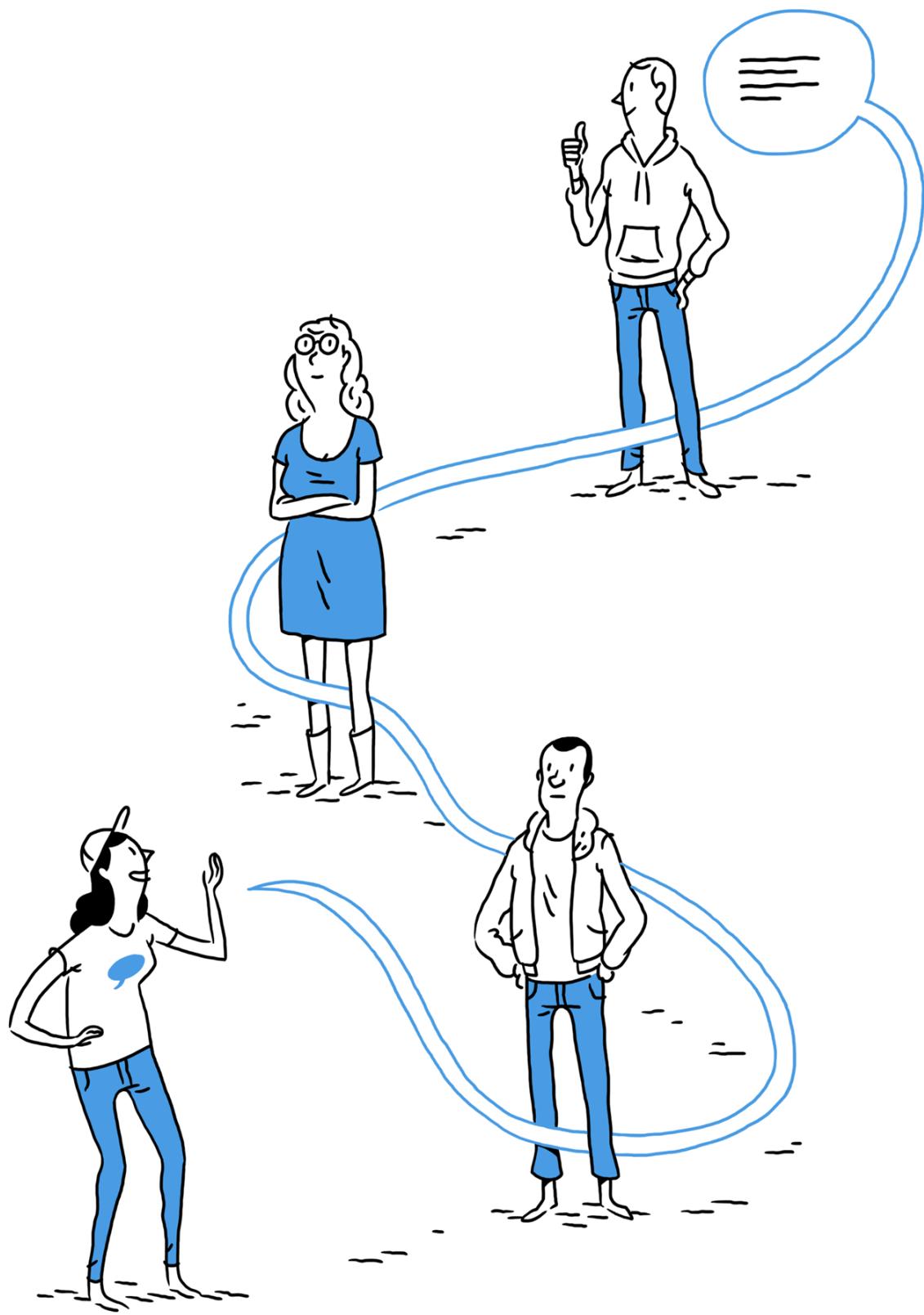
Here's three different goals that a regular newsletter might have:

- Staying top of mind with customers (and hopefully prompting them to log in again).
- Rewarding loyalty of paying customers by giving them access to an exclusive feature or content.
- Getting lapsed users to come back and have another look at your product by showing them all the cool things you've added since they last used it.

In our experience the most successful updates and newsletters are snappy, casual, and don't try to give a big promotional push. Most importantly they are readable. The last point is key - if your update isn't being read it's just clogging up inboxes, or worst case, actually damaging the relationship with the recipient.

CHAPTER 1

The Right People



Sending an announcement about your product to your entire user base or email database is like writing a love letter and then addressing it “to whom it may concern”. It feels totally wrong to the recipient and no matter how compelling the body of the message is, you’ll have to fight hard to recover from that initial faux pas.

It never makes sense to talk to all your customers, all at once. Never. When you send a message to your entire “user base” you treat them all as one big data set, not the humans that they are.

Messages that don’t consider their recipient will fail. Not only that but the more precise you are in the targeting of your message, the more successful it will be. That’s why defining and targeting the right users is so essential to a successful messaging strategy.

**You’re writing emails
for this user**



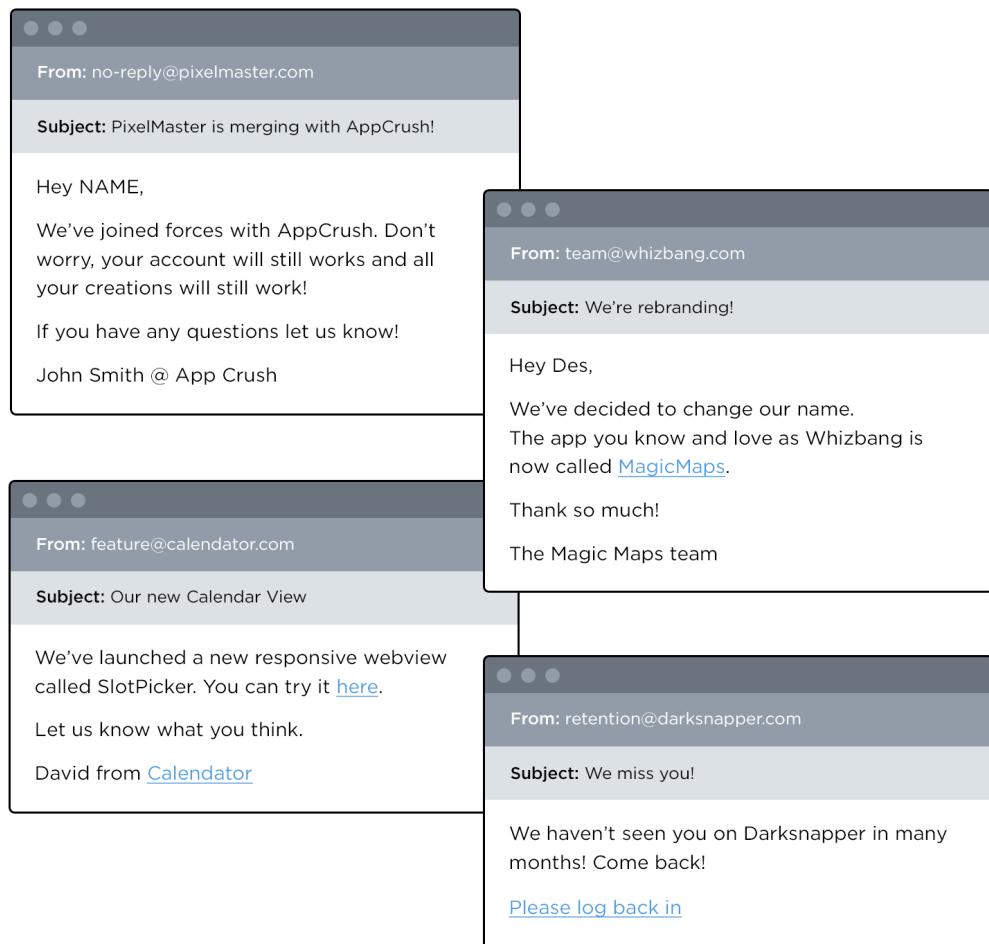
Signed up Jan 17, 2014
Usage Over 2,000 sessions
Pricing Pro Plan (\$199/mo)
Contacted 85 conversations

**But also sending them
to this guy**



Signed up a year ago,
doesn’t remember doing it,
and has no clue who you are
or what your product does.

The beauty of SaaS products is that they are easy to sign up for and try. But, as a result, every week you receive at least one message from a company you know nothing about, telling you about some feature you don't understand, because you have no idea what the product or company does. Here's a selection of some we've received recently from companies we didn't even recognize:



Much like it's bad to base your behavior on an average conversion rate, it's bad to write emails for the mythical "average user". Remember that the "average" person has 1.96 legs and 9.7 fingers, and bet you don't know too many people like that. Write for people, not for averages, and your messages will perform much better.

The more specific your segmentation and targeting, the better you enable yourself to write. Writing a message to "all users" means you have to introduce your product, remind everyone what it is, what it does, why you're writing to them, etc. All of this adds dead weight to the message for your active users who know it all. Do this enough times and they'll just stop reading what you write. You're teaching them to ignore you. Stop it.

Examples of segmentation

The key to communicating with a large user base in a meaningful and effective manner is to keep meaningful segments that everyone understands. Here are some segments that every product or app should consider, how they might be defined and why they're important. At Intercom, we've either currently or previously used these segments:

Engaged users

This is the group of users that are regularly logging into your product and using it. The exact parameters you use to define this segment will depend on the nature of your product. For example, if you run an invoice

generation app, your active users might only log in once a month, and create a small number of invoices. But if you're building a consumer photo sharing app you probably need to see a lot more activity in terms of sessions, likes, shares, and you might want a significant amount of photos uploaded.

Engaged users are your regular customers. They're loyal and depend on or enjoy your product often, so treat them accordingly. Don't sell them a product they've already bought. Don't promote features they've already used. Don't pitch them things they can't use. Instead, focus on things you think they should try, know, or master.

Inactive or disengaged users

These are the users who have not used your product in a meaningful way for an amount of time such that you can conclude they are no longer enjoying or depending on your product. In short, they broke up with you.

These users should be handled delicately. They probably remember your name, and have a vague idea what your product does, but their impressions are likely out-of-date, and you've (hopefully) improved a lot since they last saw you. You need to focus on what your product can do for them, what news you have, and why they should check up on you again. False assumptions or false familiarity here is a guaranteed fast track to the trash folder.

You can take this further: your disengaged users aren't all the same either. Some were once power users, some were using your product for

few days. Some added their team, some never finished onboarding. Segment accordingly and the effectiveness of your messages will improve.

Don't assume all your users are equal



Segment them based on activity



WHEN MESSAGING ACTIVE USES

Consider the right channel
e.g. in-app vs push vs email

Target messages based on usage
e.g. paid vs free, big team vs no team

Assume familiarity with your product
i.e. don't sell them what they're already using

Motivate new engagement or upgrades
i.e. focus on what they should now do

WHEN MESSAGING INACTIVE USES

Introduce yourself
because they don't know you

Explain what your product does
because they've long forgotten

Explain why you're mailing
in language they'll understand

Motivate a re-consideration
i.e. get them to give you another try

Free

It's a simple truth that not all customers are worth the same to your business. Many B2B apps will have a large amount of free users, often due to some form of a freemium model. Aside from being potential upgrades, free users can be a valuable resource for product promotion, product feedback, bug reporting and testing out new features for you. But with no skin in the game the opinions these people express [carry much less weight](#) than those of paying customers. Similarly free, engaged users are the right people to offer discounted upgrades.

Premium

Customers who are paying you a lot of money may deserve to be treated differently than those on free or \$9 a month plans. Depending on your business model you may want to further segment your paying customers - after all it doesn't make sense to send a new feature announcement to customers on a plan that doesn't entitle them to use it. A far better approach is to craft a message to users on your basic plan explaining what the feature can do for them and why they might want to consider upgrading to Premium to get it.

If you're offering free tickets to an event, sending out swag (e.g. t-shirts, stickers, branded notebooks etc), or hosting office hours for customers, you might want to offer it to your highest paying customers first. Having these types of segments will enable that.

Recently contacted

This one is easy to overlook but really important if you don't want to annoy your users with messages every couple of hours. For busy people, there is nothing more likely to sour the relationship, than by popping up every day with messages which are vitally important to you, but seem increasingly trivial to the recipient. No matter the quality of the content, if you're sending messages too frequently your users start to see it as spam, and will begin to ignore you. We've all been guilty of this - judging a message to be important because it is important to you but not considering how important it is to your users.

Users of each key feature

If you want feedback about how to improve your calendar feature, then you need to talk to folks who use it. If you want to find out why adoption of a feature is slow then you need to talk to the people who aren't using it and ask them why. Maybe they can't find how to access it? Maybe it's too intimidating? By tracking who is using a feature you can quickly communicate with people who have tried it and adopted it.

Power users

Again, only you can judge, based on the typical usage of your product, what tips someone into the power user category. Is it creating 100 events on the calendar? Uploading 3 photos? Inviting more than 3 teammates to collaborate? Invoicing over \$1 million? Whatever the criteria you don't want to be sending people in this group basic product information which

they will find patronizing and irrelevant.

VIPs/Friends

It's very useful to define your most important customers who you want to ensure get the highest level of service, which might include things like regular check-ins, priority customer support, or early access to new features.

This group are not necessarily the customers who pay you the most. For example you might have an early stage startup paying for your entry level package but if its been founded by someone who sold their last company to Facebook for a billion dollars, you may want to roll out the virtual red carpet. Examples of others you might want to include here are hyper growth start-ups, well connected individual users e.g. tech journalists, and/or people you know in real life who have been supportive of your business.

Trusted testers

It's good practice to maintain a trusted tester group, who will have access to your bleeding edge features and who are, in general, fault tolerant and forgiving. These users are the ideal people to solicit input from on half-baked or future facing ideas.

Sensitive users

Every product has them - users who, how can we say this, can be a little difficult. They might be the guys and gals who call you out loudly on social media, before quietly acknowledging later that actually the problem was on their side. If you want to make your life considerably easier it may be worth developing a distinct messaging schedule for this group, and only contact them with your most significant announcements. It'll also help your customer service team if they can easily identify members of this group when they reach out for help.

Slipping away

This is the cohort who once used your product frequently but have now slipped away. Your messaging should be focused on showing them the improvements you have made since the last time they used your product. You are trying to convince them that your product offers significant more value now than when they last used it.

Recently cancelled

The key piece of information you want from this group is why they cancelled. You may not be able to change their mind even if you address the issues they raise but at least you can prevent it being a deal breaker for other users. And at the end of the day, when they've cancelled their account is not the best time to convince them how great your product or service is.

The what defines the who

When you know what you are trying to achieve, the people you are trying to change the behavior in become obvious. Having precise segments at hand will streamline customer communications, which should ensure that you're never tone deaf when you speak to your customers. As a result, they learn to listen to you, not archive you.

Chapter 1: Checklist

Before you send your message...

- Are you assuming knowledge on behalf of some of the recipients?
 - Will these people know who you are?
 - Do you need to introduce your company and product to some of these recipients e.g. trade show contacts, blog subscribers, etc.?
 - Do you need to re-introduce your product to lapsed or inactive customers?
 - Will all customers understand the implications of your message e.g. are you talking about a feature that only applies to power users?
- Does this message apply to both free and paid users?
- Does it apply equally to all active users i.e. both free and paying active users?
- Should this message be localized for audiences in different geographies?
- Could you make it more effective with the addition of another filter?
- Have you identified a handful of people within your recipient list and manually verified that they should be receiving it?

Chapter 1: Quiz

Pop quiz time! Test your comprehension of chapter 1 by answering 5 quick questions. Go ahead, no one's taking score.

- 1. What should be the very first step to creating an effective message to your customers?**
 - A. define your user segments
 - B. state what you're trying to achieve
 - C. write the message
 - D. come up with a snappy subject line

- 2. Which of the following represents an appropriate goal of an effective message?**
 - A. boost open rates
 - B. ask readers to share your content
 - C. get feedback to improve your product
 - D. click on a link

- 3. Which of the following user segments should you send a discount code to?**
 - A. recently active users
 - B. power users
 - C. VIPs/Friends
 - D. free users

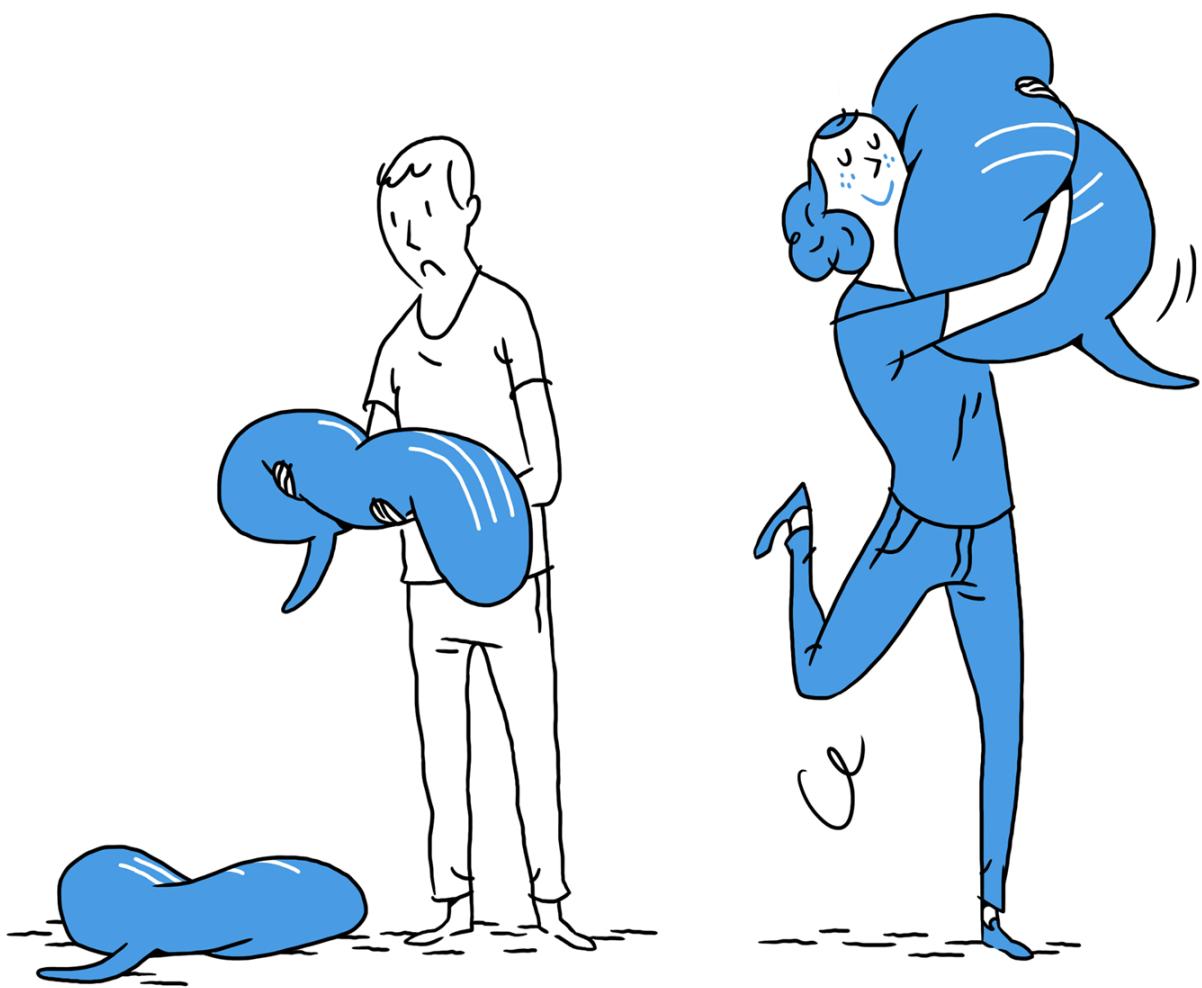
- 4. Say you want to increase engagement with your mobile app. Who should you target with a message to get the most for your effort?**
 - A. active web app users
 - B. active mobile app users
 - C. inactive web app users
 - D. inactive mobile app users

- 5. Whose feedback should you prioritize if you want to improve your product?**
 - A. free users
 - B. churned users
 - C. active users
 - D. legacy users

Answers: 1. b, 2. c, 3. d, 4. a, 5. c

CHAPTER 2

The Right Message



The content of your message is where you educate, persuade or remind the recipients in the hope that they will take a particular action. What that action is will have been defined by the goals you set at the start of the process. When you craft the right message, you can significantly increase the number of people who will take that action.

Guidelines for writing messages

Regardless of the type of message you are sending, there are some fundamental characteristics every message should have. Get these right first or everything that follows will be a waste of time.

1. Be personal

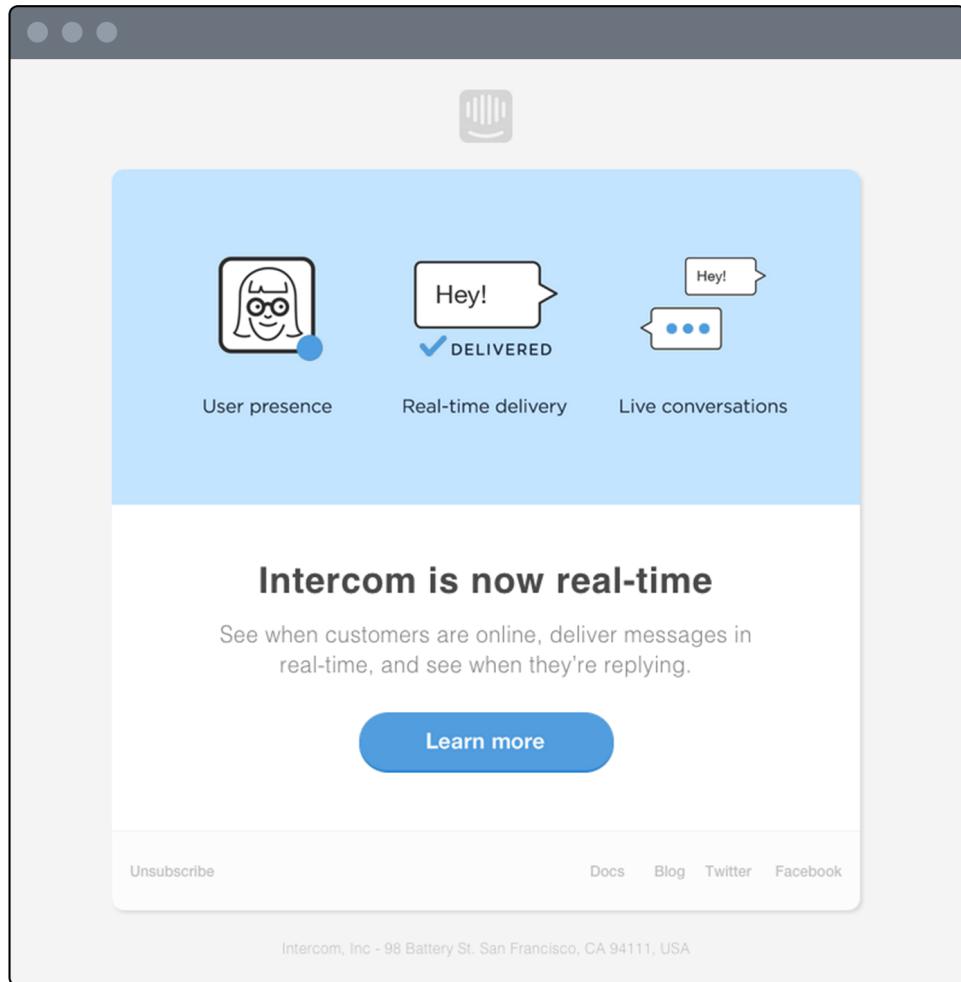
We've all become experts at ignoring messages that aren't meant specifically for us. Animated ads, over-designed pop-ups, or fake offers for "Live Chat" don't grab our attention. We filter them out effortlessly. We've trained ourselves not to see them; "banner blindness" was first reported by UX researchers as far back as the late 1990s. Similarly, mass marketing emails and generic, impersonal notifications don't get much of our attention either. It's because we know the message wasn't written specifically for us, and so we afford it less importance. Experience has taught us generic content is rarely as impactful as a personal note from someone.

Wherever possible address people by their name - we've all been annoyed when we received a message from a business we've been dealing

with for a long time and it opens “Dear Sir/Madam”. At Intercom we start most of our messages “Hi <first name>” which falls back to “Hi there”, if for some reason we don’t have their name.

The message style is also important in establishing a personal tone. Consider how you treat a plain text email sent from an actual person’s account, compared to a polished marketing mailshot from a company account. Here at Intercom, when we’re selecting what style of message to send to our customers, we most often use our in-app chat style message or a simple plain text email, because they feel handwritten and direct. We know they are likely to get better engagement than something that looks like it was sent to the masses.

The best advice is to pick a style to match your tone and intent. Not *everything* should feel 1:1 and personal. For example if you want to announce a new feature and put your best foot forward, then it’s best to do it with beautiful screenshots, engaging copy, and a remarkable design.



Caution: These are your customers so don't speak to them like you would your close friends. Even if you have a consumer-focused product rather than a business-focused one, it's possible to be too personal when you don't know the customer. No one likes false friendliness from folks they've never met. Right buddy ;-)? Our success team joke that a good tone is akin to leaving a voicemail for an aunt you've never met. Warm and friendly, but respectful about what you don't yet know.



BAD EXAMPLE

Hey new ProjectMap user,

We hope you're hitting it out of the park? Did you know that 66% of people who get a demo of ProjectMap convert to become paying customers? This week's demo slot is on Thursday at 3pm (GMT). Why not sign up now?

The ProjectMap customer success team.



GOOD EXAMPLE

Hey <first name>,

Would you or anyone else at <company name> like a demo of ProjectMap? We think it will really help you unlock more value from the product. Just let me know and we can set up a time that works for you.

Best,
Jane

2. Personalize your message

While the tone should be personal, the content should be personalized i.e. specific and appropriate to the user. Look at how Google tells certain types of users about certain types of features. For example if you receive a lot of email you'll be offered new types of inboxes. If you receive very little email you'll be told how you can do voice or IM chat instead. The

right message for the right person.

A powerful feature for creating personalized messages is to include custom attributes in each message, specific to each user. For example, you could contact everyone who has nearly reached storage capacity in your photo sharing app, and let them know exactly how much space they have left. Or why not message users who have incorrect integrations? Maybe you could mail your customers about their incomplete orders? Or, you could message your customers about their unfinished projects to encourage them to complete them.

CASE STUDY: INCREASING CUSTOMER SATISFACTION WITH CUSTOM DATA

Here's a story about how we used personalized messages to delight our customers with proactive support.

THE PROBLEM

Intercom allows you to send email from your own address (e.g. bob@bobscompany.com) rather than your Intercom one. It's a popular feature, with one drawback. To work properly, customers need to do something on their end first. (If you're technical, it's to do with the SPF policy.) Only a small percentage of customers were making the change on their end, which meant the feature wasn't working properly for the rest.

OUR SOLUTION

We needed to contact all of our customers with incorrect or incomplete SPF configurations and get them to make changes. Here's how we did that.

1. Custom User Attributes showed us which customers we needed to contact.

SELECT YOUR RECIPIENTS

Save Cancel

spf_status

is

fail

👤 Your filters match 1,876 users in total

NAME
 Fabrizio Grippo at ZIADAROO and 3 others
 Thomas Levi at TRIPPOLEX

2. The next step was to automatically message customers explaining the situation, the potential risk, and most importantly, how they could solve it. This was set up as an auto-message so any customers who failed the SPF check in the future would also receive it.

3. We also used Custom User Attributes in the body of the message so customers could see what addresses were failing. This encouraged direct action.

From: Martin Brennan martin@intercom.io

Subject: Improve your email deliverability

Hey, Matt

We noticed that you recently set up a verified sender address on ProjectMap. Great!

However, it looks like you haven't yet published an SPF policy that explicitly allows Intercom to send emails using that address. Publishing an SPF policy is very important for deliverability of the emails you're sending to your customers.

We've identified the following address(es) whose domains you should set up an SPF record for:

[Frank Murray <frank@projectmap.com>](#)
[Patrick Chase <patrick@projectmap.com>](#)

Don't worry—publishing an SPF policy for your domain that includes Intercom as a permitted sender is quick and easy, and it means your emails are less likely to be marked as spam.

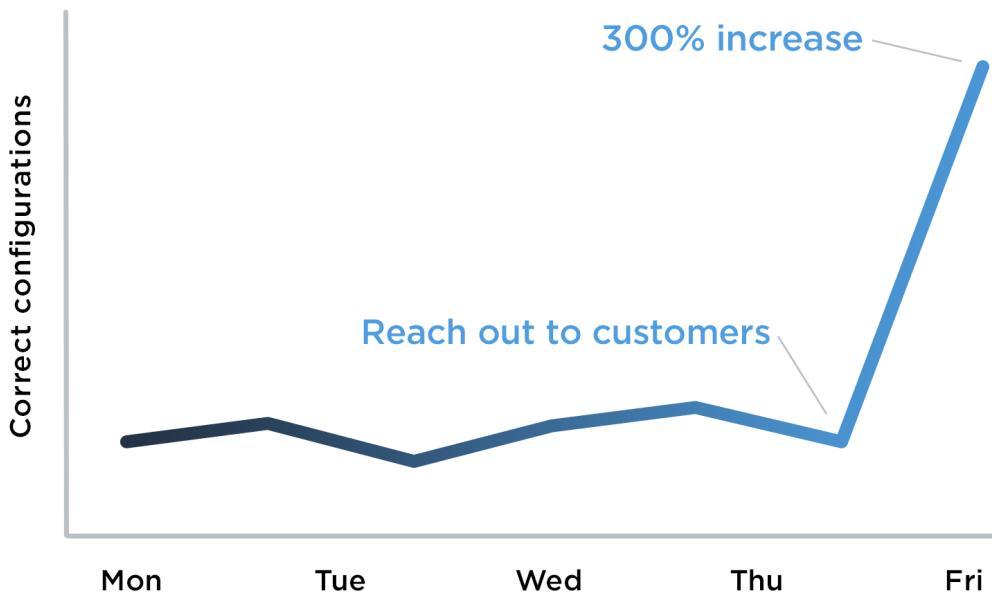
[Here's how to do it](#)

Let me know if you have any questions. We're always here to help.

—Martin

THE RESULT – A 300% INCREASE

Whilst the effort was minimal, the result was huge. The number of customers with correct configs quadrupled in 24 hours. Support requests around deliverability fell immediately, and a lot more emails were now being delivered successfully.



The replies were mostly from people thanking us for fixing the problem. However, a sizeable chunk of them contained the same few questions. Once we knew what users were asking, we were able to update our message (and the related docs) to include answers to these questions.

3. Always be polite

It's amazing how many messages from businesses can come across as arrogant or rude, when clearly that was never the intent. Here's a few things to remember:

- **Be respectful.** Your users have given you permission to email them but don't abuse their inbox. Even when you are contacting them in your app, show a bit of respect. Depending on the nature of your app,

they are there to enjoy themselves, complete a job, or save time - not to hear about what you've been doing or what you want them to do to make your life easier.

- **DON'T SHOUT at your customers.** And it's not just all caps; extreme fonts, red text, and overuse of bold, all feel too in-your-face. As a simple rule write to your customers in the same way you would talk to them face to face.
- **Don't overuse business jargon.** It's another sure fire way to appear rude and impersonal. Your customers will be acutely aware of the tone you adopt in your messages. So try to be yourself. It doesn't take much to get this right; it's actually easier than speaking more formally. Avoid all business-y robotic-type language. You just want to sound friendly, natural, and personal.
- **Consider cultural and regional differences.** Avoid slang, and not just because it can look unprofessional. Slang is one area where words often have different meanings in different geographies. Similarly, you wouldn't send a message to business customers in the US on the Fourth of July, or Amsterdam on Koningsdag, so be aware of major holidays in other parts of the world where you might have lots of customers. What might be an oversight to you might display a lack of insight to your loyal customers.



BAD EXAMPLE

Hey there,

HAPPY CHRISTMAS!!

Well actually we know that not everyone likes spending quality time with their family at the holidays. **That's why we thought you might like to try our new calendar app** as you make plans for the New Year back at the office.

Why not run it up the flagpole and see which way the wind is blowing?

The ProjectMap team



GOOD EXAMPLE

Hey John,

For many of us the holiday period is time best spent with families. But we know from our user logs that some of you like to use the down time to get a head start on the New Year. That's why we just released a new calendar app that will make scheduling projects much easier.

[Why not give it a try?](#)

We'd also like to take this opportunity to wish all our customers Happy Holidays regardless of how you choose to spend the time.

Dwayne

4. Get to the point

Look, we're all busy people bombarded by emails, messages, alerts and tasks that are all competing for our attention. And that's just in the digital domain. Do yourself and your customers a favor and be concise. Yes, you

are rightly proud of your work but go on about it at length in your messages to customers and they'll switch off.

Richard Lanham, author of the classic text, [Revising Prose](#), talks about something called the “lard factor”. These are the unnecessary words in a sentence that aren’t doing a job, have the tendency to confuse rather than explain, and generally get in the way of your message.

According to Lanham, “Business prose ought to be verb-dominated prose, lining up actor, action and object in a causal chain, and lining them up fast”. Or put even simpler business communications should be action-oriented, clear about what action it wants to take place, and quickly explains what that is.

Another useful text if you are serious about cutting the flab from your prose is [On Writing Well](#) by William Zinsser. He advises writers to “look for clutter in your writing and prune it ruthlessly” and reminds them that “a short sentence is no accident”.

Obtuse marketing language is far less effective than directly telling people things like:

- what improvements you’ve made to your product e.g it’s now 20% faster.
- piquing their interest by telling them about their account e.g. since you last logged in 5 of your friends have signed up.
- offering them an incentive to come back e.g. give us another try and we’ll knock 25% off your bill for the next 3 months.



BAD EXAMPLE

Hey there,

I'm writing to you because we've been researching our calendar feature and it turns out not a lot of people are using it at the moment. We might remove it, but we're just trying to make sure that we properly understand the issue.

So when you consider calendaring events, do you consider using our new features to do this? We're interested to find out why? Do you know we support recurring events, and also group events, so we can support most people's needs. If there's things that you'd like to do with our calendar, that are not currently supported, do please let us know, and we'll work hard to get them right.

Thanks so much for your time regarding this, and for being a ProjectMap customer.

Regards, Dwayne



GOOD EXAMPLE

Hey John,

We recently shipped a new calendar feature. I think you'd find it useful, but I'd love your feedback either way.

[Give it a try](#)

Regards,
Dwayne

5. Get the basics right

It's hard to be right 100% of the time. We're only human after all, but you should still strive for perfection with every message.

Names are one thing that you should never get wrong. There is nothing more likely to damage your relationship with a customer than addressing John as Joan, or talking to Joe when everyone calls him Joseph.

Spelling and punctuation are also critical. Get them wrong and it makes you look sloppy.

In the same vein, make sure you aren't wasting customers valuable time. So if you've got a tiered pricing model for your product, don't tell customers about features they can't access on their current plan, or don't ask customers who are on a free plan to update their billing information.



BAD EXAMPLE

Hey there Jimmy,

We'd love if you tried out the new calendar feature. It's available to everyone on the pro plan but if you haven't upgraded you can do so [here](#).

Why not give it a spin and let us know what you think

Regards, Dwayne



GOOD EXAMPLE

Hi James,

Just wanted to drop you a note about our awesome new calendar feature. It's only available on pro plans at the moment but we think you'll really like it. That's why we've automatically upgraded your account for one month so you can try it out.

[Why not give it a try?](#)

Regards,
Dwayne

6. Be relevant

Does it make sense to be telling people about your “exciting new feature” six weeks after it was introduced? Probably not, which is why you should consider an expiration date for your messages. It’s also easier to do this when you are writing the message rather than having to constantly review them and ensure what’s being sent is still timely and relevant.

That’s also why you should avoid relative terms such as “this October”, “tomorrow” or “next week”. At best you are forcing the recipient to do some mental arithmetic to figure out what time period you are referring to. Keep it simple and give the date - “tomorrow (April 5th)”, “next Tuesday (April 5th)” or “in April” can’t be misunderstood by anyone.



BAD EXAMPLE

● ● ●

Date: November 21, 2014

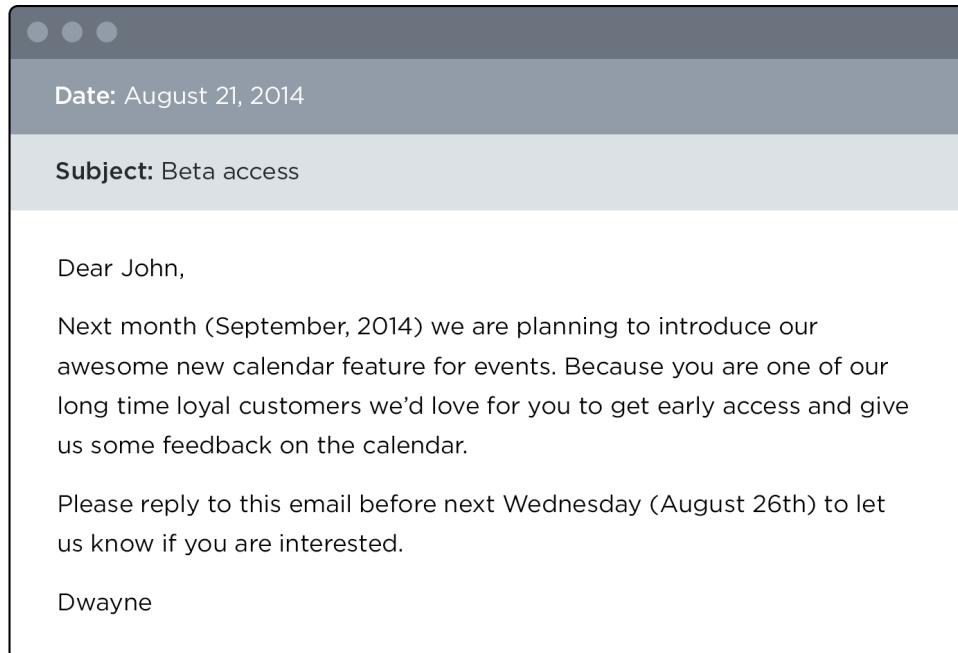
Subject: Beta access

Dear John,

This September we are delighted to introduce our awesome new calendar feature for events. Because you are one of our long time loyal customers we'd love for you to get early access and give us some feedback on the calendar.

Please reply to this email before next Wednesday to let us know if you are interested.

Dwayne

 GOOD EXAMPLE

Date: August 21, 2014

Subject: Beta access

Dear John,

Next month (September, 2014) we are planning to introduce our awesome new calendar feature for events. Because you are one of our long time loyal customers we'd love for you to get early access and give us some feedback on the calendar.

Please reply to this email before next Wednesday (August 26th) to let us know if you are interested.

Dwayne

7. Use the right tone and voice

Tone and voice aren't big issues in the early days of a start-up - generally one person (a founder or co-founder) is handling all customer communications. Or at the very least the team is huddled around the same table, such that coordinating communications isn't much of an overhead.

But as you grow and more people are interacting with your customers, having a company style guide helps ensure consistency. Companies like [MailChimp](#) and [Buffer](#) have shared theirs, which are worth reading before you prepare your own. At Intercom we've also shared why we think a [style guide is so important](#).

It's worth noting the distinction between tone and voice. The communications that you receive from your bank will be very different from the handmade bike company whose waiting list you have been on for the last year (or at least they should be). That reflects a company's voice.

Tone is more subtle and depends on the context of the message. For example, your bank's tone will be very different when it is inviting you to a social event for loyal customers compared to when it's writing to tell you that due to an error it's overcharged you for a number of recent transactions. Similarly the bike maker needs to adopt a different tone when it's telling you the waiting list has been extended for three months versus telling you your lovingly-built ride has just been shipped.



BAD EXAMPLE

Hey there,

This is a bit of a downer dude, but it seems like we has a security intrusion at the weekend. It looks like one of the interns messed up applying patches to one of our databases which created a vulnerability.

We're sure that no customer data was accessed and your billing details are stored on a different network so no panic there. Just to be sure though we are advising everyone to change their passwords,

Sorry for the inconvenience

Dwayne



GOOD EXAMPLE

Dear John,

We are writing to inform you we recently confirmed there was unauthorized access to a ProjectMap database which stored user profile information. We have since blocked this access and made changes to our infrastructure so there can be no repeat of this incident. We have published [an article on our blog](#) which we think addresses all relevant details. No specific action is required of you at this time.

However, we have also just released Two Factor Authentication (2FA) and we strongly recommend all users enable this feature, to create an additional layer of security on their account. Additional details are available in our [help center](#) and you can enable 2FA directly on your [account settings](#) page.

Earning your trust through the operation of a secure service will always be our highest priority. We deeply regret this incident and apologize to you and all your team who use ProjectMap.

For more on our security practices and policies, click [here](#).

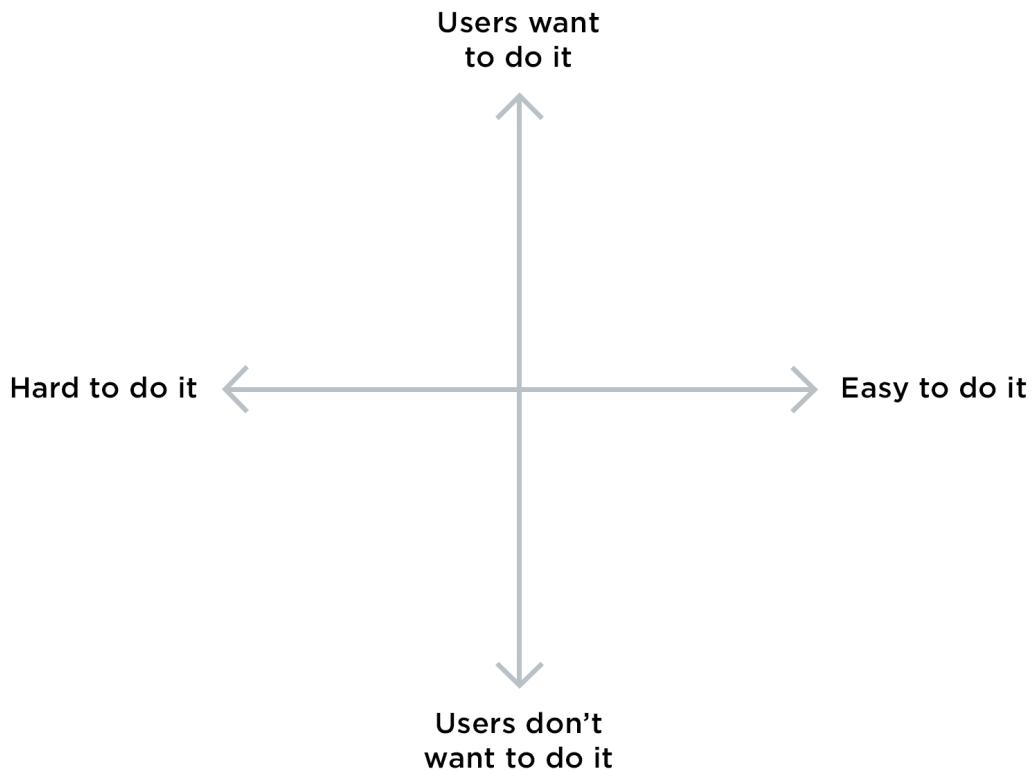
Sincerely,
All the team at ProjectMap

Educating and persuading customers

The most effective messages we see in Intercom either educate or persuade customers. Let's talk about why they work so well.

If you want users to complete a certain task that is desirable to them but at the same time is daunting, education is the way you make it seem simple and easy. If a task is easy-to-do but of low value to customers, then persuasion is how you get it done.

1. Understand your problems



If your customers aren't completing a certain step, then you need to understand why. Every user decision is a cost-benefit trade-off. How much time and effort do they have to invest? What will they get in return?

Honest “growth-hacks” simply alter this trade-off so that the cost is decreased, or the perceived benefit is enhanced. In doing this they unlock new behavior. Dishonest growth hacks follow the same school of thought as pickup artists. They usually do one of the following:

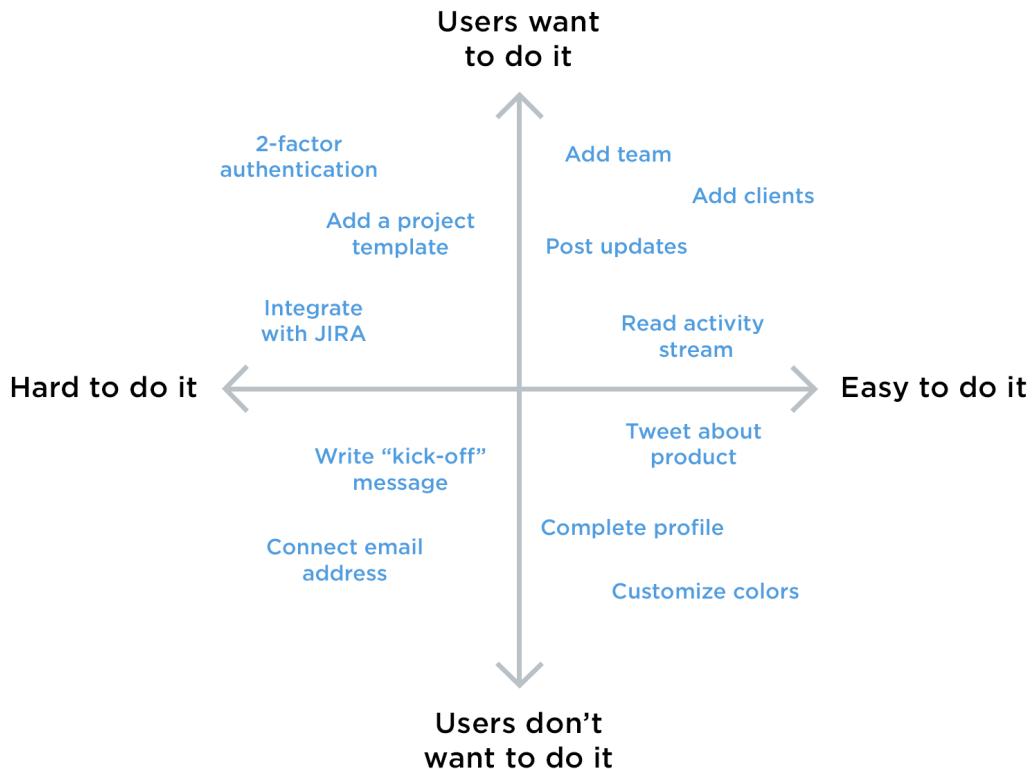
- Deceive the customer by spamming their address book, auto-

tweeting, or similar, without telling them.

- Move the goalposts, for example forcing people to sign-up before they can watch a demo increases “sign-ups”, but unless asd@asd.com is your target market, then you’re only fooling yourself.

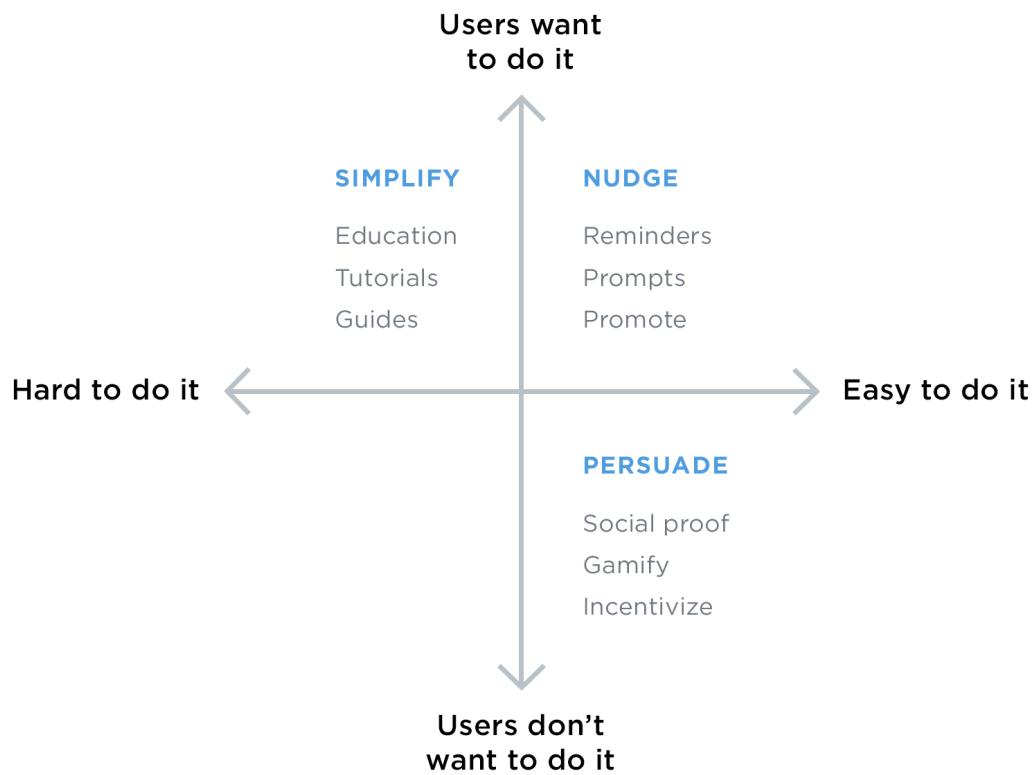
For any given task in your product you have to understand how much a user actually wants to do it, and how hard they find it when they attempt it. Until you understand the cost-benefit analysis you can’t target effective messages against them.

2. Plot out your problems



Plot your key features in the above quadrant so you can understand where your problems lie. The example above shows tasks from a fictitious project management tool.

3. Choose your approach



Depending on where a message lies, you'll either want to:

- Simplify the concept for your customers, so they feel they can take it on e.g. “Become a master of project templates in just 3 minutes”.
- Nudge your customers to remind them to do something e.g. “You’ve

yet to add a teammate, enter their address here”.

- Persuade your customers to do something, by highlighting what’s in their interest e.g. “We’ll give you 20% off your bill if you...”.

Before you ask - yes, we’ve skipped a quadrant. The bottom left is a nightmare. A task that isn’t easy to do, and the user doesn’t want to do it. Brute force is often the only way. If you’ve ever been forced to register an account or install an app just to read an article, well, welcome to the bottom left :)

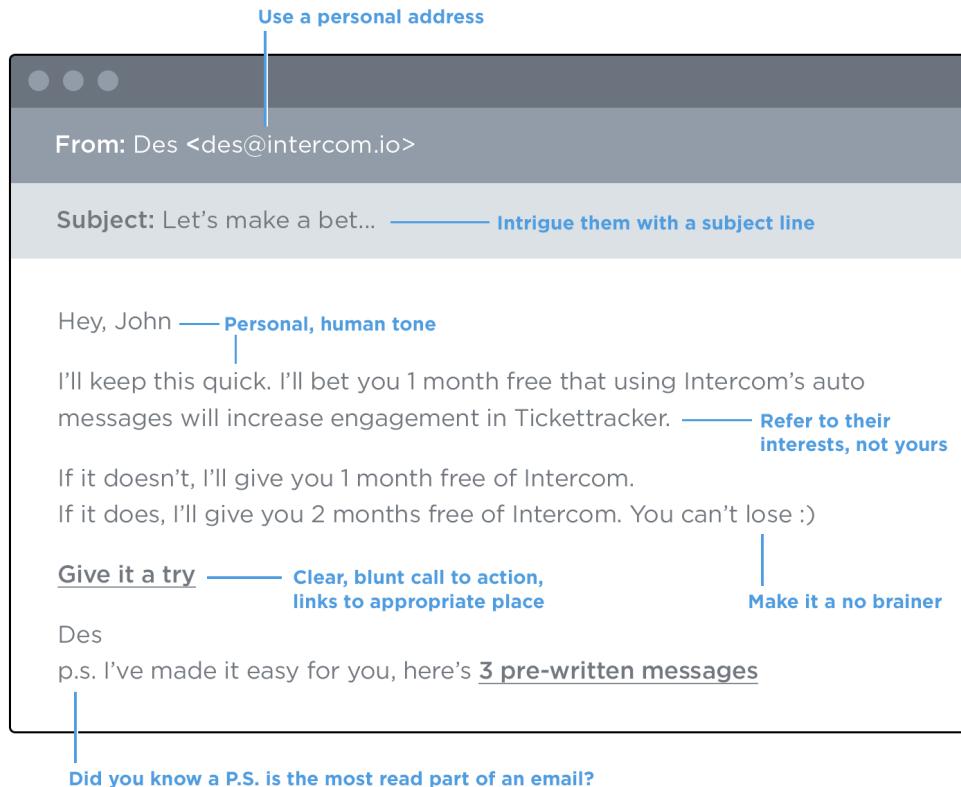
Pro tip: Don’t build a business that relies on customers doing complex things that they don’t even want to do.

4. Send your messages

Before you start writing your message, decide if you’re trying to educate, persuade, or just nudge users towards a goal, and let that be the focus of your content.

Anatomy of a good message

The style and wording of a successful message will be unique to your business. It will speak to your customers in the voice and tone that’s right for you. But the furniture that surrounds that core message has got to be right too. Here’s our thoughts on what that furniture should look like and how we think you should arrange it.



Subject line

You have a limited amount of words to play with so be clear and direct. When viewed on a desktop the average inbox will show about 60 characters of the subject line. But increasingly email is read on mobile devices - over 50% according to some estimates. In that scenario you can't be sure that any more than 25-30 characters will be visible, which means you have less than 6-8 words to get to the point.

Some experts suggest writing the subject line first - it sets the tone and ensures you have it in mind as you write the body copy. You've done some SEO and Google Analytics work and know what kinds of things your

typical customers are searching for. The keywords you discovered are useful for informing you about the kind of language your customers are using. Using them in your message subject lines will make them more likely to be opened and acted upon.

Some other useful pointers:

Convey a sense of urgency and uniqueness: Include a deadline to spur recipients into action, add custom data so that it looks like the message has been tailored for them.

Avoid looking like spam: Avoid overuse of terms like free, RANdom capitalization and exclamation marks!!! It makes you look like a scammer.

Sell the benefits: You should have your goal in mind but don't become so focused on it that you forget to explain the benefits to the customer if they act on your message.

Spell them out clearly: One of Fortune magazine's best-selling issues was about pension planning. The cover headline was simply "Retire Rich".

Intriguing your customers with a compelling subject line is also a great way to cut through the clutter in inboxes.

Bad: Let us help you get the most from Auto Messages

Good: Let's make a bet...

The allure of a gamble with a stranger is likely enough to get most people

to read on for more information.

Call to action

This is it - the pivotal moment where someone either makes the commitment and clicks through to your website or simply closes the message and forgets about it. But while a good call to action (CTA) can really help with click through rates, don't obsess over it either. There are many factors - whether a message is seen, does the recipient open it, are they in the "work frame of mind" - which come into play before the CTA has to work its magic.

Don't forget the basics - the CTA should be an image (usually some kind of button or pill) or line of text that is linked to the action that you want the recipient to take. If it's upgrading their account it should link to the account settings page. If you want them to download a book it should direct them to the landing page for it.

Picture or image? Bright, colored button or low-key, stylish one? A lot will depend on the audience that you are sending the message to. It's well worth A/B testing to get a feel for what resonates with them.

Don't over complicate things by giving your customers multiple options - there should only ever be one primary call to action in each message.

A simple "click here" line is rarely the best call to action - while it offers much in terms of clarity it won't compel anyone to click.

CTAs shouldn't be written using weak language either. Instead they should encourage action and the outcome should be obvious from the text.

Bad: Are you interested? If so click here, to make the best of this offer today. Or reply to this message with the subject line "One Day Only Offer". For more information read our FAQ section on the website. You can also log in to chat to a customer care representative at any time. Remember terms & conditions apply, although not too many. Offer expires 1/1/15.

Good: Click this link to discover the benefits of upgrading to RecruitmentApp Pro

Obvious link style

Keep it really simple. Yes, your designer will think it's a cliche but if you want all message recipients to be clear that text is a link, you won't go far wrong if you make it blue and underlined. Particularly if you've chosen a personal message style rather than something that looks more like traditional marketing communications.

Predictable location for links and CTA

If you want to play it safe your CTA should be centered and on a line of its own, preferably against a plain background so it stands out. For the most important elements of your message don't use an inline link surrounded by lots of text. They get lower click through rates.

Design for screen reading

Online readers exhibit very different behavior compared to the traditional reader of the printed word. Research [has shown](#) their eyes move around the screen in a roughly F-shaped pattern.

First they scan across horizontally at the top of the page or message - this is the top of the F. Next they move down the screen and scan horizontally again, forming the lower bar of the F. Finally they scan the left hand side of the content - some slowly, some extremely fast - creating the stem of the F.

What does this mean for your writing? Well consider:

Everything you wanted to know about security

vs

Security: everything you wanted to know

Security is the keyword you know will resonate with your audience so make sure it's at the start of the sentence.

The nature of F-shaped reading also means the middle of the message, highlighted on its own, is a good place for your call to action.

And on a related note:

- People's eyes will quickly skip to bullet points.
- So consider putting your key information here.
- We did make you read it, didn't we?

The Postscript

While the internet was still in its infancy, direct marketers had long figured out that after the headline the postscript is the most read piece of a sales letter. It's one of those things that has mapped pretty neatly to the digital world, so consider putting a well crafted PS on your messages. It's a great place to add additional information or push the sale and tip the recipient from curiosity into action.

Footers

Yeah, we know they're boring but they're important. There are certain things people will instinctively look for at the bottom of an email. Details of how to unsubscribe, links to your social media accounts, your physical address, your privacy policy. Depending on what country you are based in or selling to, or regulations specific to your industry, you may also need to include things like your tax registration number or other regulatory data.

The key here is to apply it consistently and with a design that makes it easy for people to find, without overwhelming the message you are trying to communicate.

Crafting the right type of message

We've covered the characteristics of good messages and discussed the need to educate or persuade customers. So let's apply what you've just learned to the different types of messages you might want to send in different circumstances.

Product announcements

It's said the job of advertising is to get a consumer to try a product just once. This is a good way to think about new feature announcements - your goal is to get the recipient to try the new feature or app just once. After that, it's the role of the product or feature you are releasing to generate regular usage.

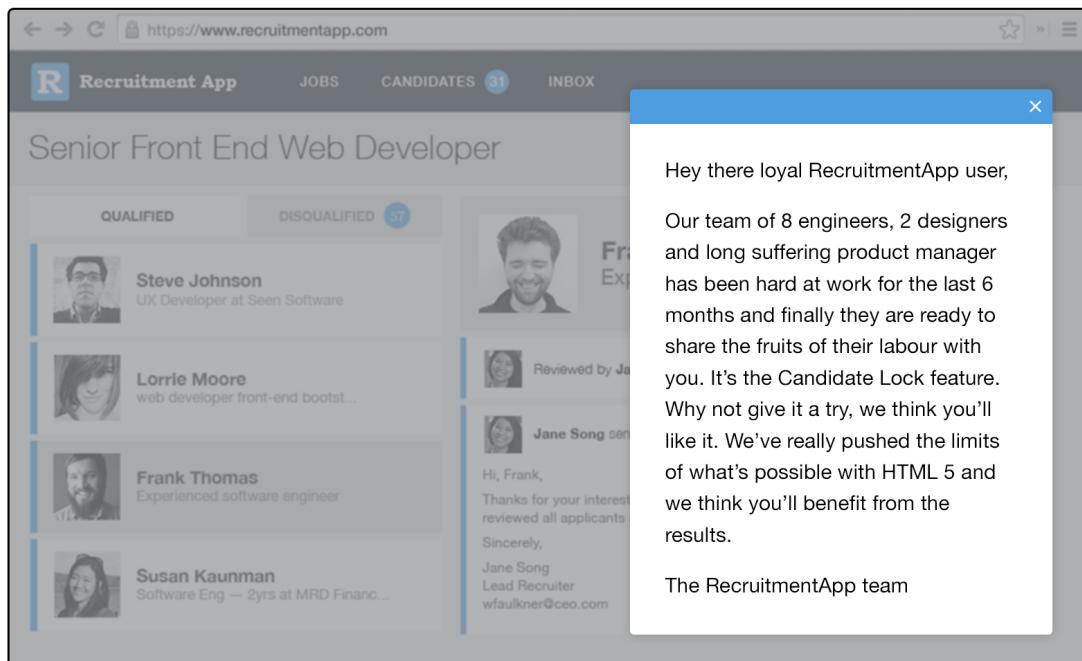
By focusing the copy in your message on getting people to try the feature, a lot of the cruft and padding just drops away. Put yourself in the shoes of the recipient who is probably hearing about the product or feature for the first time. What is the key thing that is going to convince them to give it a try - is it going to improve their social life, save them time at work, make them more money?

Unless you're selling to developers, no one cares that you've re-written your app from scratch in the latest programming language. No one cares what you did, or often even how you did it. Your customers care about what they can do with the product.

You also need to think about the barriers that might prevent people from

trying the feature. Is it available on their price plan? Is it available in their country? Does it require an integration with another product or service they may not be using?

BAD EXAMPLE

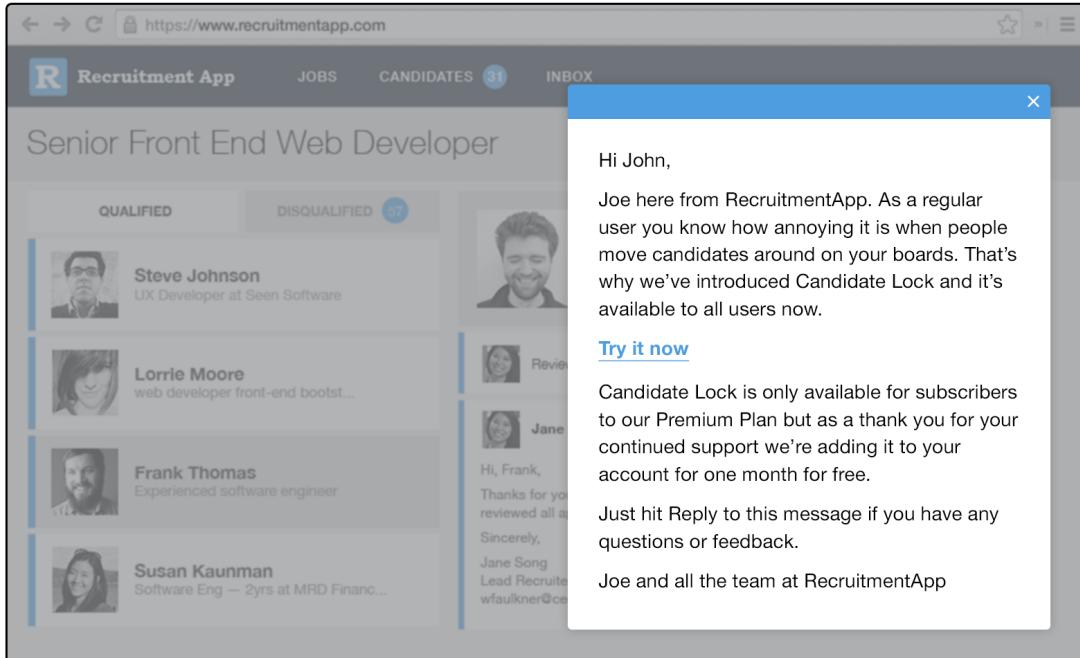


Questions it gives rise to:

- While I appreciate your teams' efforts on this, what's this Candidate Lock thing going to do for me and my business?
- How do I even try this out to see if it's of use to me? Oh, yeah, there's the link buried in the text.
- What, you mean this is only available to people on your Premium Plan? Why did they send me that email then?

- What is possible with HTML 5?

GOOD EXAMPLE



Surveys

The goal of your survey is not to get lots of responses, even if you think a big number might impress your boss, your investors or some other third party. What you are after is quality, actionable data that will help you improve your product or service.

We all get asked to fill out lots of surveys, so you need to persuade customers it's in their interests to complete this particular one. At the very least you need to make it clear the results of the survey are going to be acted on - no one wants to feel like they are wasting their time.

You can also provide a carrot in the form of a prize or reward. But just remember a reward related to your service e.g. upgrading a package for a short period or providing a discount voucher, will be far more effective at getting loyal users to respond than the latest shiny gadget such as an Apple Watch. Offering an incentive also focuses your mind on the value to you of the responses. If quality data from a loyal user is not worth a month of premium service, should you even be asking customers to give up their valuable time to respond?



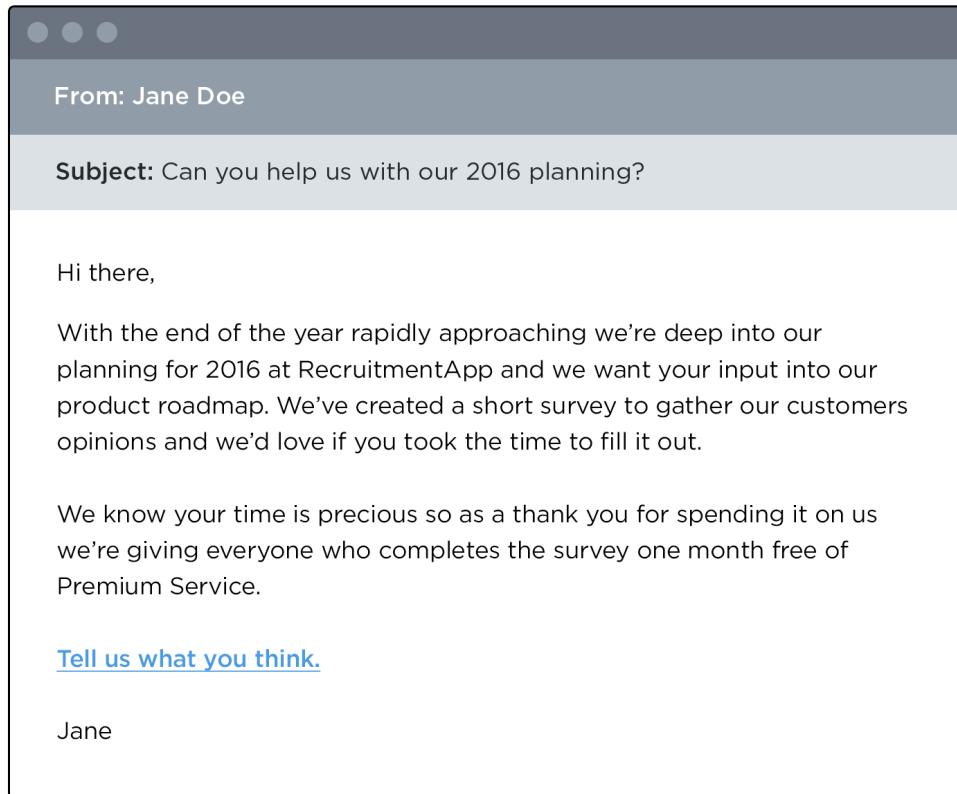
The image shows a simulated email interface. At the top, there are three small gray dots. Below them, the "From:" field contains "Jane@RecruitmentApp". The "Subject:" field contains "Good work". The main body of the email starts with "Hey John," followed by a message: "Just wanted to say - great job! You've been making out like a bandit with RecruitmentApp for more than six months now. Well done! Have you run into any problems during that time? We'd really like to hear about them. Would you mind taking our quick survey? (It'll take 10 minutes at most)." At the bottom, the name "Jane" is signed off.

Questions it gives rise to:

- What's in it for me?

- If I answer these questions will they actually improve the product?
- My boss invited me to have a look at this product a few months ago, how would I be able to answer a 10 minute survey about it?
- And if I had problems why are they only asking me about them after 6 months?

 GOOD EXAMPLE



Feedback

At the outset of a new project, or especially if you've recently taken over a product, it's tempting to survey all your users to appraise where things

are. It's usually a mistake.

When you survey all your customers together you ignore the specifics. You mix up yesterday's sign-ups with life long customers. Those who used your product every day with those who log in just to update billing details. Those who only use one specific feature with those who use them all. It's a mess.

There's a much cleaner way to get much better feedback. Here are some examples:

- If you want to improve your onboarding, only talk to people who recently signed up.
- If you want to improve a feature, only talk to those who use it.
- If you want to understand why people aren't using a feature, only talk to those who don't use it.
- If you want to find areas of concern, only talk to active customers who use all your features.



BAD EXAMPLE

The screenshot shows an email interface with a dark header bar containing three dots. The main body of the email has a light gray background. At the top, it says "From: Jane" and "Subject: RecruitmentApp feedback". The message content starts with "Hi John," followed by a paragraph about sending the email because Jane signed up for RecruitmentApp recently. She then asks if John can find time for a quick Skype or Google Hangout call. Below this, she asks for John's preferred time. The message concludes with "Best regards, Jane".

From: Jane

Subject: RecruitmentApp feedback

Hi John,

I'm sending you this email because you signed up for RecruitmentApp recently.

Would you be able to find time this week for a quick Skype call or Google Hangout? I'm really keen to get your feedback and hear your thoughts on the service.

Please let me know what time suits you best!

Best regards,
Jane

Questions it gives rise to:

- I just signed up yesterday - what the hell could we talk about on a video call?
- Skype or Hangout - that feels a bit too personal? Will we be turning on the video? Can't I just send him an email?
- What time suits me best? I haven't even agreed to talk to him yet.
- What specifically does he want to know about?

 GOOD EXAMPLE

From: Jane Doe

Subject: Congratulations on your first RecruitmentApp listing

Hi John,

Congratulations on adding your first job listing to RecruitmentApp - you've hit a major landmark. We're always looking for ways to improve our service and really value feedback from our new customers.

What one thing could we do to make it easier to start using RecruitmentApp?

Just hit reply and let us know what you think (about this or anything else to do with our service). Even better I'd be happy to jump on Skype or a Hangout if you want to discuss this, or any other issues relating to your use of the app.

Look forward to hearing from you,

Jane

Invitations

You're having a customer meet-up, drinks at a show, or some other event where you are going to meet up with your customers face-to-face. Exciting times. But don't let your excitement get the better of you, so that you end up sending out a sloppy message.



BAD EXAMPLE

Hey Dude,

We're getting together with some of our favorite customers for a drinkup at Woodbury after work tomorrow. As someone who's been with us since the early days of ProjectMap we'd love if you could come down and do some shots with the team.

Here's to a hungover Saturday

Jane

Questions it gives rise to:

- Who is Jane and why is she inviting me for drinks?
- In fact, this all sounds a bit chummy and casual?
- Where is Woodbury? Better Google it...oh, San Francisco? But I'm based in Portland. Luckily I'm in SF on business.
- But when's "tomorrow"? This email came in overnight. And what time is "after work"? I'm lucky if I'm ever finished before 8pm.
- Do I need to RSVP?
- And I'm not really sure this is going to be my kind of event - I haven't touched a drop of the hard stuff since my freshman year at college.



GOOD EXAMPLE

Hi John,

Free next Thursday? If yes, you should come along to our first customer meetup in San Francisco. The team will be at [Woodbury](#) this coming Thursday, February 19th from 6:30-8:30 PM.

Come meet fellow RecruitmentApp customers for an evening of networking and drinks. BounceUp's Director of Customer Success, [Ryan McGrath](#), will also share how they use RecruitmentApp to attract top quality talent to their startup.

If you can make it, [please RSVP](#) so we can make sure there is enough beer to go around. :)

I'll be making the trip to San Francisco myself so really hope we get to meet in person.

Cheers,
Jane
Community Manager @ RecruitmentApp

Apologies

We've all received them; messages from businesses, which at first sight, look like an apology for bad service or some other drop in standards. But on second read, you realize that the carefully crafted message never actually makes an apology, or admits liability, and diverts blame from the company. The more extreme classics of the genre have clearly been dictated by legal advisors rather than anyone in the company who deals with, or has empathy for, customers.

If you need to apologise to customers it's essential to be clear and sincere

or you are wasting your time. You'll do more damage than you'll fix. Provide as much information as possible about what happened, why it happened and what action, if any, the recipient needs to take. The damage has already been done - don't make things worse with an apology that annoys or insults your customers.

An email interface showing a message from "The ProjectMap team" with subject "Results of our recent security audit". The body of the email reads:

From: The ProjectMap team

Subject: Results of our recent security audit

Dear valued customer,

During a recent security audit it became apparent to us that there had been unauthorised access to the ProjectMap database. We immediately took the app offline for a couple of hours to apply necessary patches and upgrades.

We are sorry if this incident caused you any inconvenience. The security of our customers data is of the utmost importance to us here at ProjectMap.

Yours sincerely,
The ProjectMap Customer Success team

Questions it gives rise to:

- Was any of our data compromised? Do we need to inform our customers/shareholders/regulator? Has ProjectMap informed the authorities?
- If my data is so important to you, why is this not signed by the CEO

rather than “the customer success team”?

- What do I have to do now? Who should I go to with questions?
- What steps have you taken to stop this happening again?
- Why did you send this message? Are you actually sorry or did you just send it because other customers are calling you out on Hacker News right now?

 GOOD EXAMPLE

From: Jane Doe, ProjectMap

Subject: Important message about ProjectMap security

Dear John,

By now you should be aware of the recent security breach we suffered at ProjectMap – we posted a series of updates about it on our blog and status page. All of the team here want to offer sincere apologies to everyone at Intercom for the inconvenience you will have experienced when we were forced to take the app offline for two hours to deal with the situation.

At ProjectMap, we take pride in ensuring the security of our customer’s data. Unfortunately, on this occasion we did not meet our own standards or the level of service you’ve come to expect of us. After a thorough review of the situation, we narrowed the cause to an incorrectly applied database upgrade. We have also engaged external consultants to confirm our diagnosis.

Our internal investigation, confirmed by our consultants, has found unauthorised access was confined to a database that does not contain personal or billing information of customers.

Because of this lapse in standards, we are offering loyal customers such as Intercom, 3 months free service. This will be automatically credited to your account.

If you have any outstanding questions or feedback on this incident, or any other ProjectMap related issues, just hit reply to this message and I will respond personally. Once again I’d like to thank you for placing Intercom’s business with us.

Yours sincerely,
Jane Doe, CEO, ProjectMap

Promotions

The first thing the message recipient is going to ask themselves is “what’s in it for me?”, so when you are writing your message you need to address the question “what’s in it for them?”. Make it clear what the offer is, how it compares to your current offering, and how they can take advantage of it.

It’s even more important here to have a compelling subject line - after all you are trying to get people to open their wallets and the first step to doing that is to get them to open your message. Don’t make it about you or your amazing product. Sell the benefits to the customer - if they take advantage of this offer how will it improve their lives?

It can also be useful to inject a sense of urgency by making this a time-limited promotion. Although make sure you don’t undermine it with repeated follow-ups extending the offer - that’s just annoying and smacks of desperation. Neither are good characteristics of a business.



BAD EXAMPLE

From: The RecruitmentApp team

Subject: Upgrade deal of the day

Dear John,

Have we got an offer for you? We just launched a new candidate search facility and to celebrate we've got deals for you – we've slashed prices on our Pro and Plus accounts. Upgrade now and you can get Pro for \$29 a month and Plus for \$39 a month. Just log into your account now or respond to this email with the words “Upgrade Pro” or “Upgrade Plus” in the body of the message and we'll do the rest.

The RecruitmentApp team

Questions it gives rise to:

- How much of a saving is that?
- What's the difference between Pro and Plus?
- What can I do with those plans that I can't do now?
- Do I qualify for this offer? If not, why am I being sent this?
- Where would I sign up, even if I was interested?
- When does this offer run out?

 GOOD EXAMPLE

From: Jane Doe, RecruitmentApp

Subject: A special deal for you

Dear John,

We want to make sure you don't miss out on how we're celebrating our new and enhanced candidate search filters – with this special deal!

So here's a last call to save 15% on Pro and Plus accounts.

This offer expires Tuesday, April 28th at midnight ET.

When you upgrade to a Plus or Pro account, you'll get access to unlimited candidate searches, a customizable company profile page with advanced Google Analytics statistics, and loads more special features.

[Upgrade now](#)

No code needed – the discount is automatically applied at the checkout!

Jane

Chapter 2: Checklist

Before you send your message...

- Have you spell-checked it?
- Have you had a colleague read it over?
- For email, have you checked your message will render in all popular clients?
- Will the email display correctly on mobile?

Copy

- Is the tone of the message personal?
- Have you personalised it?
- Is the message polite?
- Is it concise?
- Are all the details correct and valid for the recipient?
- Will the information be current when it is received?
- Does the tone and voice match the content?

Subject line

- Have you written an engaging subject line of less than 8 words?
- Have you front-loaded it so that the keywords are at the start?
- Is it written from the point of view of the customer?
- Does it convey a sense of urgency and uniqueness?
- Could it be mistaken for spam?

Call to action

- Is it clear what action you want people to take?
- Is it written in an active voice?
- Does it stand out from the rest of the message copy?
- Is it clear which is the primary call to action?

Links

- Have you clicked all your links to check they work?
- Do they stand out from the rest of your copy?
- Is it clear from the text or image what you are linking to?

Postscript

- Have you included a postscript?
- Does it hammer home the key message you are trying to communicate?

Footers

- Have you included all the relevant elements?
- Unsubscribe Contact details
- Social media Edit email preferences
- Mailing address Forward to a friend
- Copyright information

Chapter 2: Quiz

Think you got all that? Take our quick quiz and find out.

- 1. If you want users to do something low-effort, like tweet about your product, what should your messaging aim to do?**
 - A. nudge
 - B. simplify
 - C. educate
 - D. persuade

- 2. What should you do when you receive the same feature request from five people on the same day?**
 - A. add it to your long-term product roadmap
 - B. build it
 - C. treat it as a hypothesis
 - D. ignore it

- 3. If you want to understand a user's frustrations with your product, when's the best day to ask for feedback?**
 - A. day 1
 - B. 1 day after canceling
 - C. day 30
 - D. day 2

- 4. Which of the following should be the goal of sending out a survey?**
 - A. collect quality feedback
 - B. re-engage users who abandoned your product
 - C. high email open rate
 - D. collect as many responses as possible

- 5. Who should you send feedback surveys to, if you're looking to improve your product?**
 - A. all users
 - B. power users
 - C. active users
 - D. churned users

Answers: 1. d, 2. c, 3. c, 4. a, 5. c

CHAPTER 3

The Right Way At The Right Time



It's not just what you say. Where, how, and when you say it are also extremely important. As Seth Godin [pointed out](#) "More people get engaged in Paris in the springtime than on the 7 train in Queens." Maybe it's to do with the spring air but one of those locations is definitely more conducive to romance.

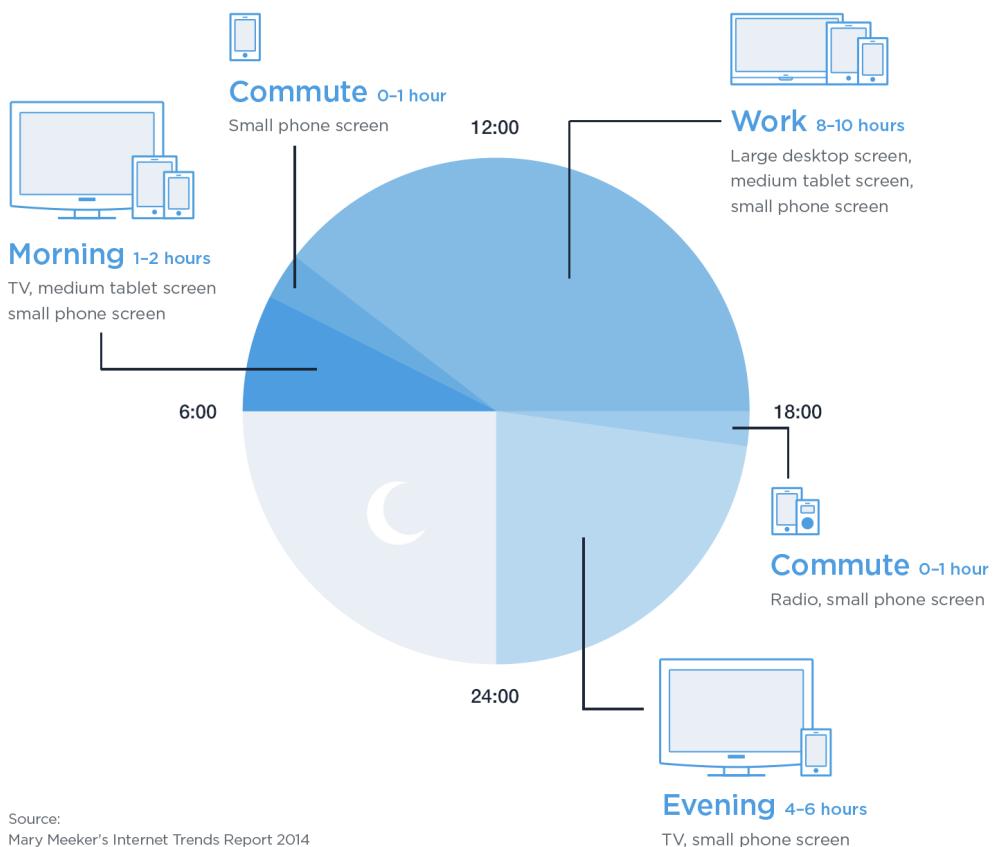
Why does it matter when and where someone receives your message? It's all about context. We've all been handed a flyer on the street for a restaurant we'll never eat at. It's irritating. But not because the restaurant is offering a bad deal. It's because a flyer about pizza doesn't matter when we've just filled up on sushi. These messages are totally out of place, wasteful and can even come across rude. But imagine if they were always accurate - if you only got the flyer when you were hungry and looking for pizza. You'd buy the pizza there and then.

For the moment, you have to carry on imagining. This kind of accuracy isn't possible out on the street. But it is possible for your customers inside your product. The context in which your customers receive your message has a major influence on its effectiveness.

A day in the life of a message

Before thinking about when you might want to communicate with your users it's worth looking at some of the situations during a typical day in which people receive messages from a business. A whole range of environmental and personal factors impact on how receptive people will be to messages at different times of the day.

At some points during the day we are totally in work-mode, but other times we are tuned-out and trying to relax. Parts of the day are quiet and we are able to focus, while we also go through periods where we are juggling competing demands and trying to filter out distractions. You can't hand deliver each message, tapping the recipient on the shoulder at the optimum moment, but you should consider the likely scenarios into which you are sending your message.



Breakfast

First thing in the morning, a message you sent overnight is most likely to be read on a tablet or smartphone. Most people will do a quick triage of email and other alerts, archiving a lot of mails that are irrelevant, seeing if there's anything urgent, and leaving everything else until they get to work. Assuming your message even gets a look in between Twitter, Facebook, and the news, not to mention "real-world" distractions - whether it's making coffee, feeding the kids, or exercising the dog.

Arrive at the office

At the office - whether that's at home or somewhere we commute to - a bigger screen comes into play. Everyone has a particular set of apps and services they check at the start of the working day to get a fix on what needs to be done that day. Check the calendar for meetings, review email, open Slack, then Twitter, then Slack, then back to email again, all just to build up a mental model of where things are in work.

Then it's down to real work. There's a good opportunity to get your message read and acted on if you're near the top of the pile and your message stands out from the noise. As the day progresses, the most common pattern for dealing with messages, particularly email, is to check sporadically with an occasional triage between tasks or meetings.

During a meeting

No matter how important the meeting, people get bored or distracted.

The phone buzzes on the table and they can't resist a quick glance at the push notification. They've no time to read the full message, never mind process, or reply to it, so chances are high it will get ignored or missed. That's why polite reminders sent at a different time of day to the original message can be so effective.

On the couch in the evening

If someone has just finished a run or bike ride, is chilling with their feet up as they upload their route to Facebook from their smartphone, and is generally feeling happy with their achievement, it's the perfect time for a fitness tracking app, to ask them to upgrade to a pro account. But it's far from the optimal time for a project management tool to ask if they'd like to try out a new charting feature.

Socializing with friends

No one wants to receive a push notification telling them they face account suspension if they don't urgently update their billing information, at 7pm on a Saturday night. It'll just be ignored and forgotten. It may even make them anxious and resentful towards the sender. As a product owner you have to ask yourself what are the chances a customer will take the action you want if you contact them on a weekend evening? If they need to take their company credit card out and fill all its details in on a mobile device (maybe on a site that's not even mobile optimized) the chances are pretty low. But if you're launching a new app that lets concert goers find last minute tickets in their city, well then Saturday night is prime time!

The right way

The limits of current technology mean you can't get granular enough to ensure *everyone* will get your message at the right time and in the right context. But there are a number of things you can do to make sure it arrives in the manner that's appropriate to the *maximum* amount of people possible.

With an arsenal of modern messaging tools at your fingertips, you can send your marketing, product and support messages through a diverse range of media. The first thing you need to think about when crafting a message is what medium is most appropriate. There are pros and cons to every medium, so let's look at what they are for some of the more common ways you might contact a customer.

Phone/voice call

More and more people are using their phones less and less. As a result they resent being interrupted by calls unless they (the customer) deem it to be really important. The synchronous 1:1 nature of the telephone also makes it an extremely inefficient medium for reaching out to large numbers of customers.

But if you find out that one of your largest customers is on the point of quitting, you'll have no hesitation in picking up the phone and calling their CEO straight away. And that's the difference. It's for necessary, one-

off 1:1 conversations. You're not going to send them a Twitter DM or an in-app auto-message, even if it triggers when they visit their account settings page (and let's face it, if they are visiting that page, you're probably already too late - they're canceling). There are still times when it makes sense to pick up a phone and ring someone. They are just becoming rarer and rarer.

Positive: Personal, immediate, targeted, high bandwidth.

Negative: Not scalable, interrupts, time consuming, no guarantee of delivery i.e. that they will pick up the call.

Text message

One advantage text messages retain is they are almost ubiquitous - everyone with a mobile phone can send and receive them. So it's useful for things like sending codes to activate accounts or for two factor authentication.

But for most people the rapid rise of WhatsApp, Facebook Messenger, Line and other messaging apps has all but killed SMS. So much so that by late 2014 WhatsApp was sending 30 billion messages every day - 50% more than the global SMS network. Not bad for a company that had just 55 employees when it was acquired by Facebook.

Positive: Guaranteed delivery, asynchronous but becoming more real time.

Negative: Still seen largely as a personal not business medium, short messages.

Post/“snail mail”

Rumors of the demise of letters may have been greatly exaggerated. In fact, the rarity of receiving a letter is why it can be such a powerful medium. When you get a handwritten personal note from a business it's delightful and surprising. At Intercom we've begun sending a thank you note to customers when they hit certain significant milestones.

Positive: Rare, surprising, delightful.

Negative: Not scalable or immediate, expensive.

Twitter

You may have thousands of followers on Twitter but what percentage of them are likely to see any given tweet you send? When they follow you, people agree to see your updates but the chronological nature of Twitter's timeline means that if 10% of them see an individual tweet it's a good result. Twitter does offer a group messaging feature but it is relatively limited - you can add a maximum of 20 accounts to a group and each account is limited to sending 1,000 direct messages a day. But if your message has the potential to go viral, or is simply something followers are going to want to share, Twitter has no peer.

Positive: Permissive, opt-in, viral capability.

Negative: Untargeted, transient, no guarantee will be viewed.

Facebook

If you have any lingering doubts Facebook is inappropriate for business communication, consider this: 55 million European Facebook users have expressed an interest in entrepreneurship. The challenge with Facebook is that its algorithms closely control what appears on a user's timeline. Just because someone has "liked" your company or product's page, does not mean they will see updates you post. Also you cannot message someone who likes your page unless they've messaged the page first. Think of Facebook like other "earned media", such as coverage in the media or offline word of mouth.

Positive: Popularity, targeted (especially ads).

Negative: Noisy, need to purchase advertising to guarantee visibility.

Push notification

Notifications are an increasingly important way to drive users into your app, but they're not the only way. Push is similar to email, it's not inside your product, but it's far more disruptive. It interrupts the recipient - even if they only glance for an instant to see what the alert is - so make sure to use them accordingly. You wouldn't interrupt a customer in real life to say someone just looked at their new project, so don't push them a notification about it.

At Intercom our approach with push notifications is conservative. Again, the more personal you are the better: if Facebook sends me a generic push notification to tell me to add more friends, it's spam. But if they tell me that Brian has replied to my message, I'm interested.

Positive: Immediate, ease of response/action, guaranteed delivery, right device.

Negative: Diminishing returns, interrupts recipient, easily ignored, not all devices, short message length.

Email

Emails can be targeted to the right user, and can sometimes be timed correctly, too. The problem with email is it's never in context. It makes no sense to ask your users for feedback about your sign up process two weeks after they sign up, three hours after they shut your app down, and while they're checking their email on the train home.

Email does still [have its place](#), though. The key advantage it has over in-apps is that you can guarantee your customers will receive it; unlike in-app messages, which they have to log into your app to receive. That's why email is best for critical communications. At Intercom we use it for billing, re-engagement, and one-off, time-sensitive announcements (e.g. "Today we launched Real Time Messaging.")

Bear in mind, lots of people now "do email" in bursts so they can

concentrate on their real work. This means your message could be one of 25 they're trying to get rid of, which makes it one of the toughest times to try and sell them something.

Positive: Scalable, ubiquity, (almost) immediate, all people, all devices, guaranteed delivery.

Negative: Overuse, low read and replay rates, timing and formatting.

In-app message

There's one characteristic of in-app messages where they have no real competition - delivering messages in the right context. If you are trying to elicit some change in behavior within your app, what could be a better time to ask customers than when they are in the app and can take immediate action.

In-app messages interrupt your customers workflow and delay them from doing the task at hand, so use them sparingly - particularly large format messages that take over the whole screen. Put yourself in your customer's shoes and ask yourself just how important this message is to them.

Positive: In context, high rates and quality of replies. Low effort for recipient.

Negative: Doesn't reach inactive users, may interrupt workflows/leisure time.

The Right Time

By now you should be able to pick the right medium for your message, so the last major decision is about when you want people to receive it. There are many important aspects to be considered. What are the chances that the message will be seen immediately? Have they been a customer long enough to make this message relevant? Is it likely lots of other messages will be sent at the same time?

There are a number of distinct aspects of time you need to consider, but once you've considered the impact of all of them you'll be well positioned to draw up a message schedule for your app.

Frequency

As mentioned, if you message your users too often they will simply learn to ignore you. Even worse, if you start showing up in their inbox unannounced they will start to tag you as spam. A [recent study](#) of attitudes towards email marketing found 44% of respondents wanted to receive less email from companies and brands, with 46% saying they flagged email as spam if they received too many messages from the same company. It's not all bad news however - almost half of respondents said they would either like to get better quality content or offers tailored to them.

Local time

The time of day when someone receives a message can have a huge bearing on its effectiveness. This is why it's incredibly useful to be able to segment your users according to their geography - when it's lunchtime in San Francisco, it's late evening in Berlin. Even if your current tools don't support geographic segmentation it's possible to optimize the time of day you send e.g. send a message at 9am PST/5pm GMT and you will get a high proportion of people at their desks in the US and Europe.

Calendar time

The day and date you send your message will also impact its success. In large parts of the world, all but the most critical, or shopping related, messages sent in the days running up to Christmas will be filed under "possibly, later" i.e. they will be forgotten about. If you have an invoicing app, the end of the month is probably not the best time to contact your customers with a message which is not essential. It's likely to be the busiest time for your customers who are trying to get their billing sorted before the end of the month. Similarly if you had a tax filing app you need to carefully consider what communications you send coming up to the April 15 deadline in the US, or whatever the comparable tax filing date is in their country.



User lifecycle

Often of more use than calendar time is the time relative to when people first started using your product or service. The milestones will be specific to your product but don't make the mistake of confusing time elapsed as a user with where that person is in the user cycle. We've all received messages from services congratulating us on hitting a milestone such as being a user for six months. But just because I've been a user for six months doesn't say anything meaningful about my usage of the product, such as whether I'm a regular user, power user, or even use a particular feature.

Take a project management tool, the key events in terms of user cycle

time might be:

- signs up for a trial
- creates a paid account
- creates first project
- completes first task
- invites a teammate to collaborate
- invites a client to collaborate

At Intercom we've seen that messaging customers after they hit key milestones in our product is far more effective than relying on calendar time as a proxy for engagement.

Note: Major anniversaries and milestones e.g. one year as a customer, can be a great time to remind people of the value your product has given them.

Creating a message schedule

Your message schedule is the timeline for the set of messages you want customers to receive at key moments during their lifecycle using your product. Just as you don't expect the host to ask you to fill out a comment card as you take your seat in a restaurant, it doesn't make much sense to ask a customer who signed up yesterday to follow you on Twitter. In the early days of the relationship, surely you've got more important things to talk about?

That's why you need to map your key messages along a timeline. Ideally the messages should be sent when a user matches certain conditions set by you e.g. signed up 1 day ago and is pro user and is using the calendar feature.

The secret to a successful message schedule is getting the context just right. This means being laser targeted with the rules and conditions you apply. If you've never created a message schedule, the good news is that there's loads of low-hanging fruit and quick wins. To start with, there's a basic set of messages every business will immediately benefit from sending to their users.

Before you start writing

A successful message schedule provides a unified experience for your customers - each subsequent message seems to follow logically from the one that preceded it - but the touchpoints with customers are spread out over time. They should feel like they're receiving one unified and coherent flow of information, not sporadic unbalanced bursts of communication. Thinking of it like this will help you avoid conflicting messages and create a schedule that's much more effective.

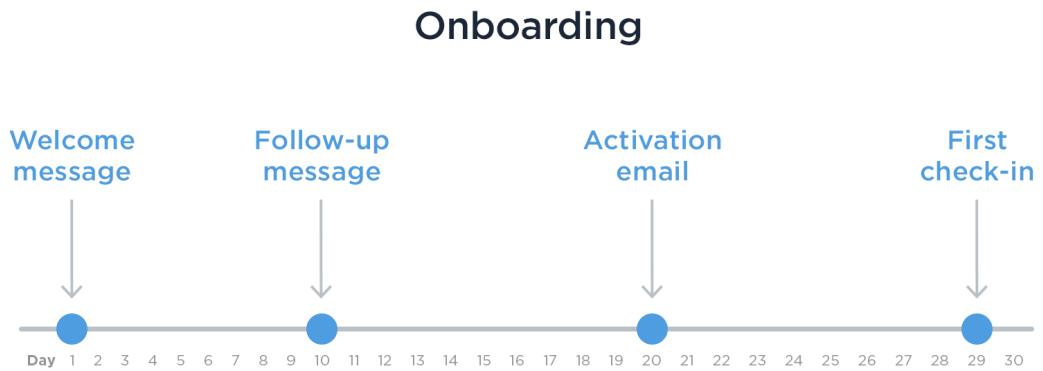
A good place to start is with a blank piece of paper and pencil. Identify the key times and events when you think customers should receive your messages. Write them down. Map it out. Changes here are free. When you're happy with the high-level experience that you've designed, then you can begin crafting and scheduling the individual messages.

Gradual exposure of features

As a customer digs deeper and deeper into your product, you'll want to start exposing more value and highlight more features to them. For example, your keyboard shortcuts aren't of much value to users on their first session, there are more important features to expose at that point. But you might want to send them a message about keyboard features once they've mastered the inbox by sending twenty replies. At that point you know they're up-to-speed with your core features and not going to be overloaded with things to learn. Many product owners try to expose their peripheral features either through badly timed email blasts, product documentation, or their FAQs. None of these approaches work well. Targeted, behavior driven in-app messages are the best approach here.

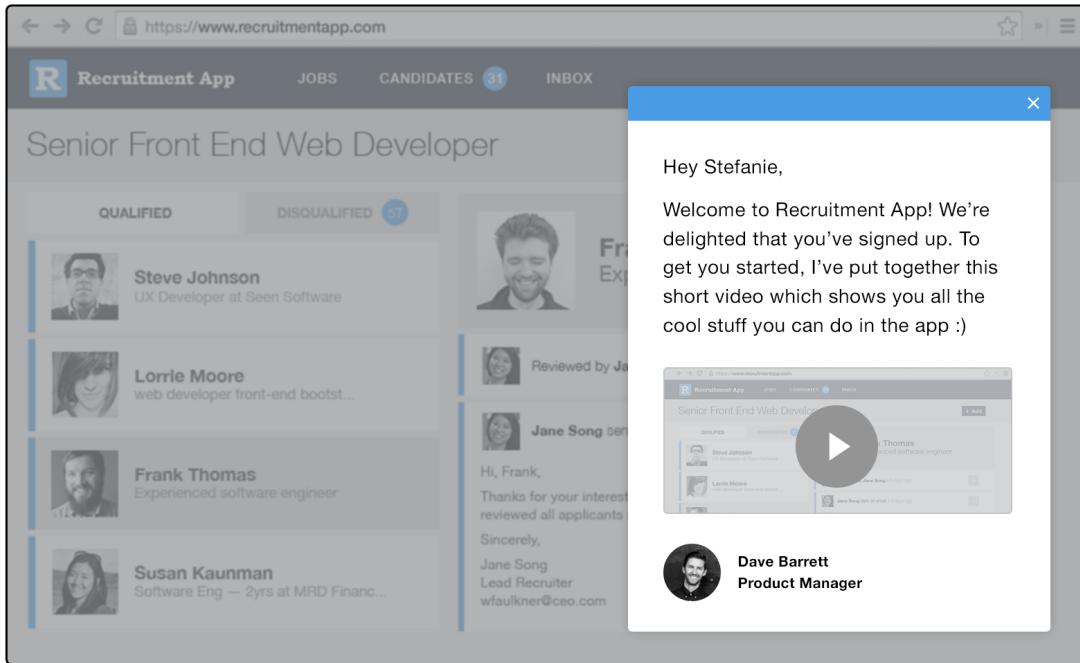
We've outlined an illustrative message schedule for a product below. It's split into two high-level sections; user onboarding messages, which in this case are sent over the first 30 days, and the customer nurturing messages that come after that. Pick and choose what you think will work best for your business, and of course, make it your own.

The Onboarding Period



The onboarding period is sacred. Only send messages that are designed to turn your new users into loyal and active customers of your product. This is not the time to be pushing your new feature, asking for feedback, or promoting your super-interesting new blog post. Put some space between sign-up and sending these type of messages. Here at Intercom, we don't send any messages that aren't specifically related to onboarding in the first 30 days after sign-up. This means we can focus on getting customers engaged with Intercom in all the right ways, without them feeling like they're being spammed with content irrelevant to their needs.

WELCOME MESSAGE



You'll never get a second chance at welcoming your customers to your product so make the first message count. When new users sign up, introduce yourself, let them know you're there to help, and set a positive tone for the relationship. Why not include a smiley, happy photo of yourself? It really does help increase engagement if your users are reminded there are real people behind the software.

This is why in the finest restaurants, the host is one of the most senior roles; high-end joints call them *maitre d's* and they are highly paid professionals. Who you meet when you enter an establishment, and how you communicate, sets the tone for your whole experience. Have a bad experience before you get to the table, and it's likely your whole evening

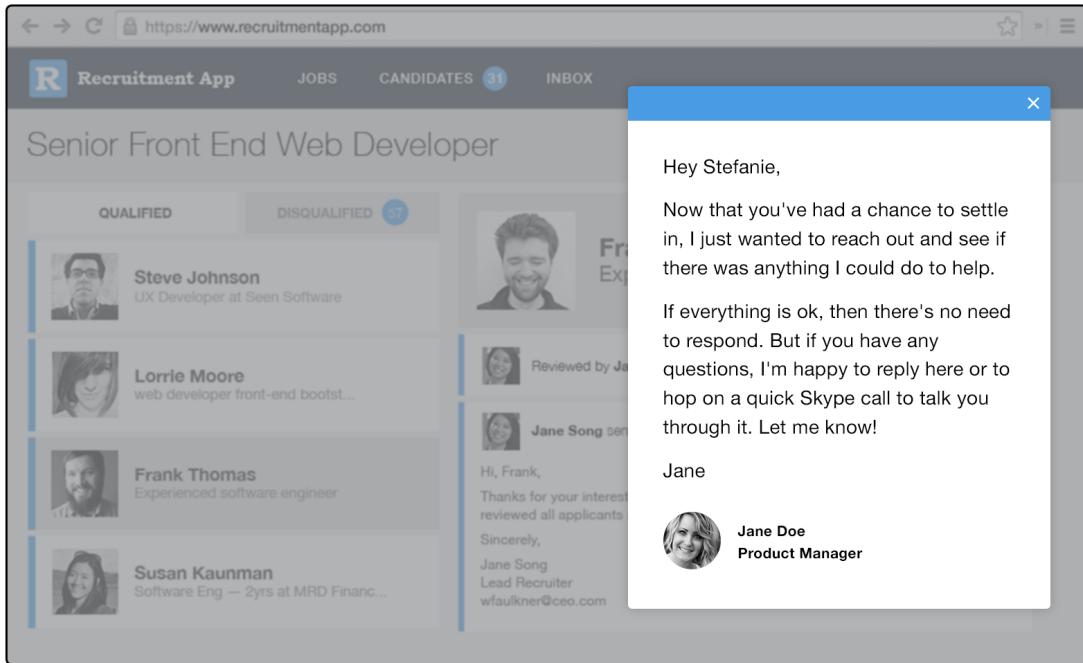
will be ruined.

The goal here is to get people started using your product. The quality of your welcome message will directly impact whether your subsequent onboarding messages get read or ignored. As your users' tendency to engage with your messages decreases slightly over time, you might find your welcome message has the highest engagement rate. So make it count. Give people a clear next step. Maybe it's signing up to your webinar? Visiting your installation documentation? Updating their profile page? Maybe it's simply to log in to your app?

Whatever you've found to have the most impact in getting users to start using the product, make it the subject of message #1. But remember to keep it focused; one clear call to action is best.

Sidenote: Should you welcome new users in-app or with an email? Probably both. Right after they sign up is one of the occasions when a user is expecting to receive an email from you - so make it count. Similarly the first time someone logs into your app is a great opportunity to set them on the right path and show them the feature most likely to convert them to a lifelong customer.

FOLLOW-UP MESSAGE

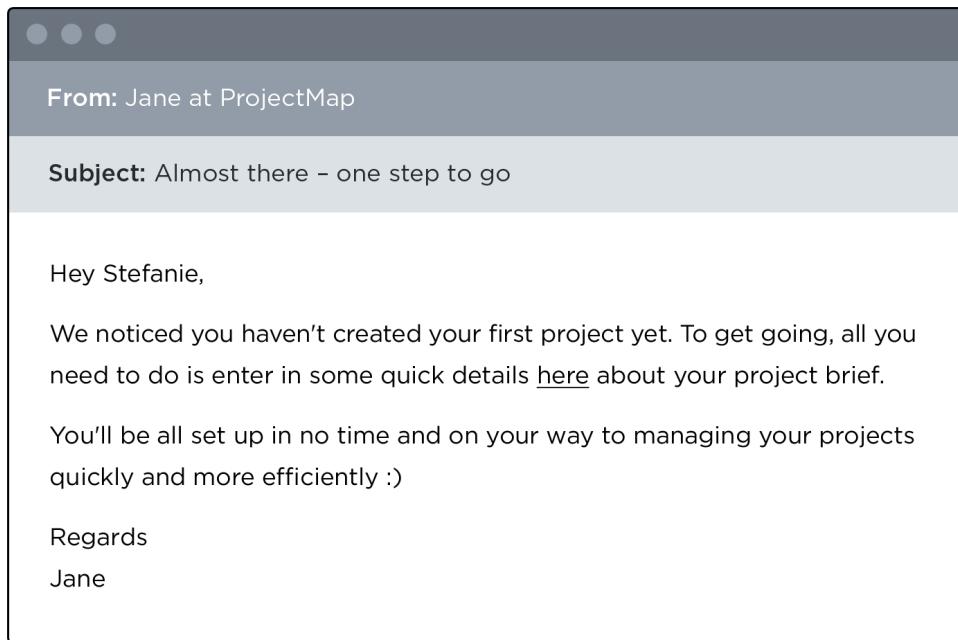


Have you ever considered why wait staff always drop by your restaurant table a few minutes into your meal and ask if everything is alright? Certainly in better establishments it's to head off any issues you might have before they develop into a full blown complaint.

Now that your customers have had time to assess things, they'll have questions. So get in touch with them a few days (or sessions) after they sign up. As well as letting them know you're there to help, a good follow-up message might invite them to a webinar, or even better, to a 1:1 Skype call where you'll talk them through your product. Share useful links at this point too, maybe to your knowledge base or blog.

Pro tip: Remember to exclude users who've done the thing you're asking them to do e.g. if you're inviting users to a demo, be sure to exclude customers who have already attended a demo.

ACTIVATION EMAIL

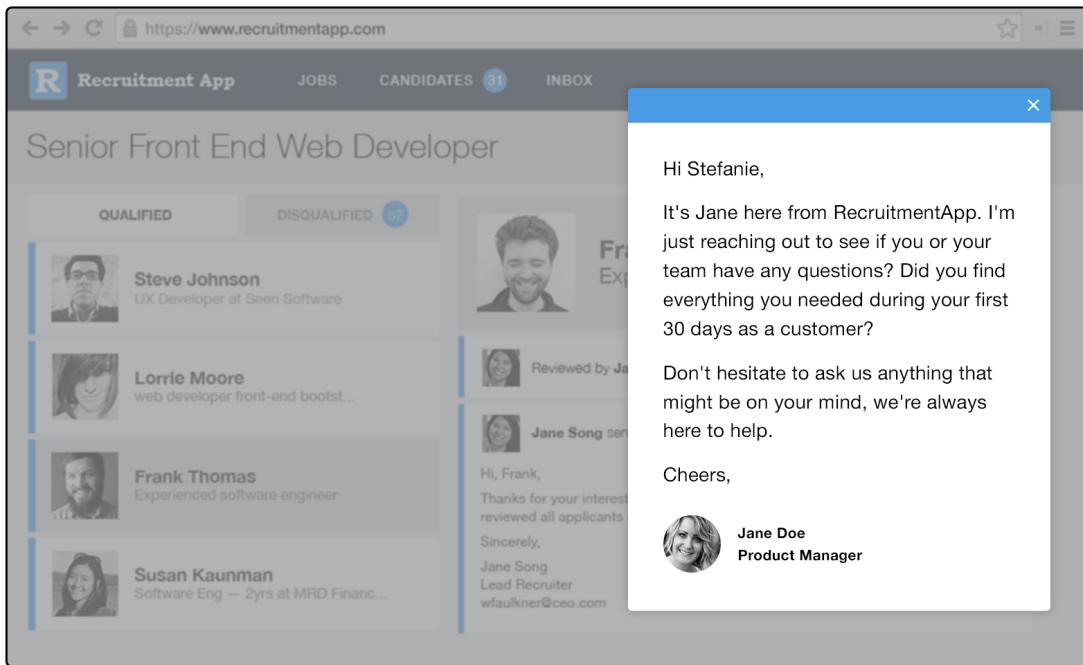


Many users who sign up for a product only use it once. This is especially true for products with a free trial. That's why you can't rest on your laurels and assume someone has committed to your product just because they signed up - they could easily just be curious to check it out.

There will be times when a user signs up, but fails to take the first step like completing registration, or adding their teammates. If two days after signup they haven't carried out that next step, it should automatically

trigger a message. Make it an email, or possibly a push notification, rather than an in-product message as you are trying to get them back into your app. The message needs to clearly outline what the next step is that they need to take, and the value to them of taking that step.

FIRST CHECK IN MESSAGE



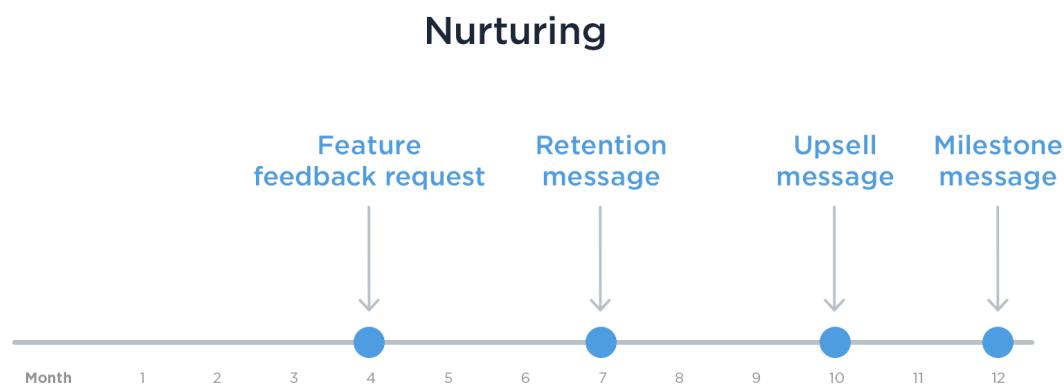
Once onboarding is almost complete and users have settled in a little bit, it's a good time to ask how things went. Your message should be short, to the point, and personal.

What is your sign-up process like? How has onboarding been? Is the product doing what they expected it to? What do they expect from you in the future? Once an auto message like this is set up, it will provide a

constant stream of valuable information into your inbox about your new users and their behaviors. For something so easy to set up, it provides a massive return on investment.

Your conditions here could be “signed up a month ago”, “has been recently active”, and “has previously been engaged with the product”. This will ensure it is sent only to your new active sign-ups.

Deepening the relationship



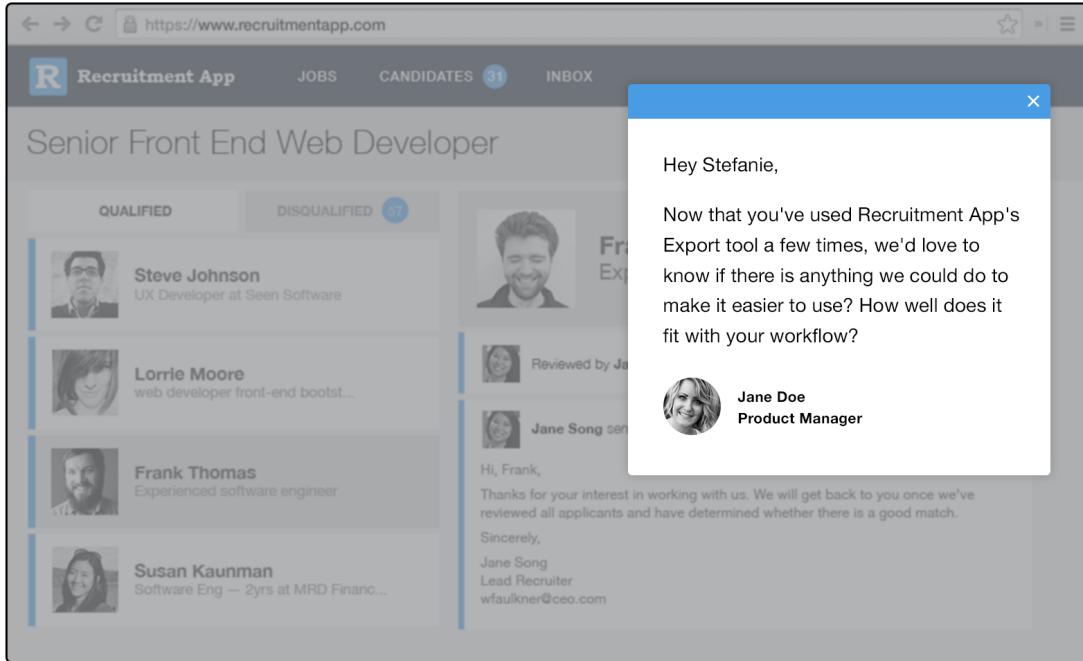
When a customer has gone through your onboarding and is still with you, you can breathe a little easier. You've got them on the hook but now it's time to build on that relationship. Here are four messages we find particularly useful to send in the period after onboarding. Some of them aim to increase the chances a customer will stick with you, while others are about ensuring both sides get maximum value out of the relationship.

Milestone message

Major milestones, like the anniversary of signing up, are useful times to send out messages which nurture the relationship and further engage customers. These messages should make extensive use of custom attributes so they are personalized for each user and remind them of the value they are getting out of your product. For example, one year after signing up you might send a user a mail congratulating them on the number of projects they completed, amount of tasks they created and how many teammates and clients they have collaborated with. Put those actual numbers - 372, 40, 196 - whatever they are, in the message.

Of course, milestone messages can be behaviorally based too e.g. you could send a message congratulating them on achieving power user status after they create 1,000 tasks in your time tracking app.

Feedback request



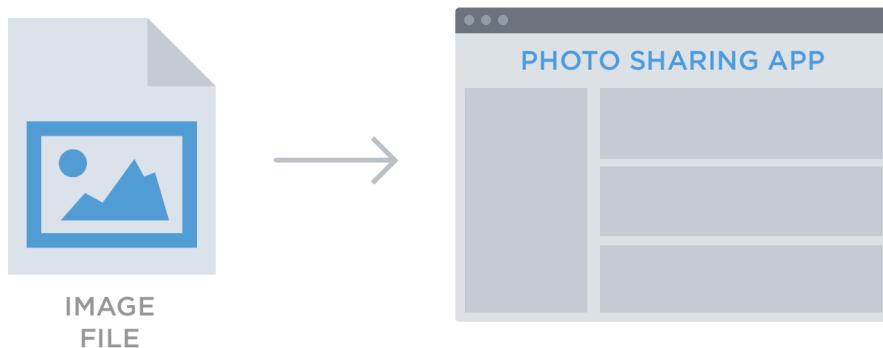
Whether you've just launched a feature, or it's a year old, you can always learn more about it. When you're looking for feedback on a feature, you need to message your users inside your app, in context. You'll get more replies, and they will be much better quality.

You want to avoid asking your onboarding customers these questions. Rather, these messages are better pitched at your loyal and active customers, who you know are likely to respond. Your conditions here might be signed up more than 45 days ago and has used the feature >20 times.

In order to design the best possible product, you need to fully understand

your users' workflows from start to finish. One Intercom customer, who owns a photo sharing app, thought that they had a good understanding of how their customers were using it. In particular, they figured customers were dragging and dropping image files from their computer into their app for a quick upload, as the design intended.

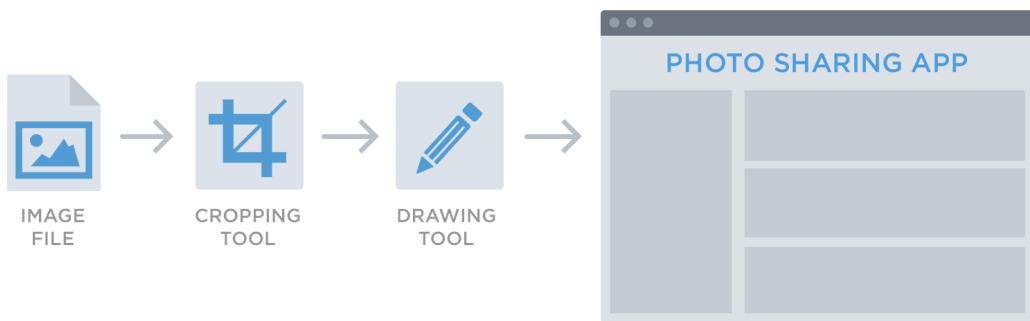
Investigating a behavior or workflow



But they had their suspicions there was something else going on - so they investigated. They sent an in-app message to a group of users the next time they uploaded a photo, explaining the research, and requesting a brief summary of their workflow.

Because the message was in-context, lots of them replied. What the team got back was really interesting; people had been taking additional steps before uploading a file to their app. First, they were using a separate tool to resize the photo, because it had a cropping option. Then they were using a drawing tool to overlay some basic annotations. Finally they were dragging and dropping the file into their app.

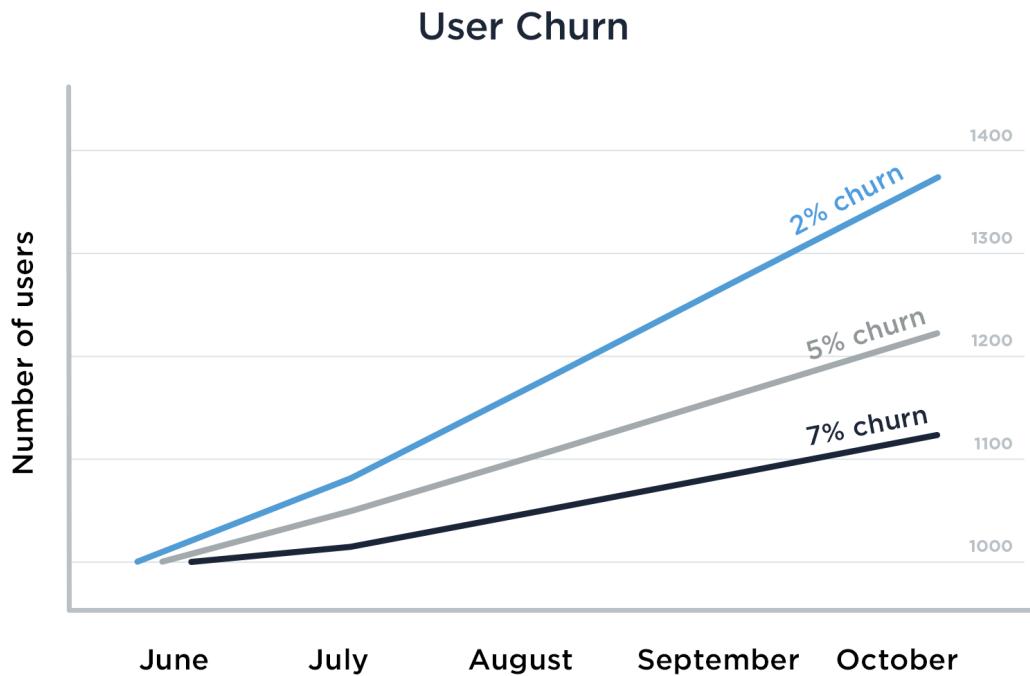
Investigating a behavior or workflow



This new data informed their product roadmap for the following quarter and you can bet it included cropping and annotation features.

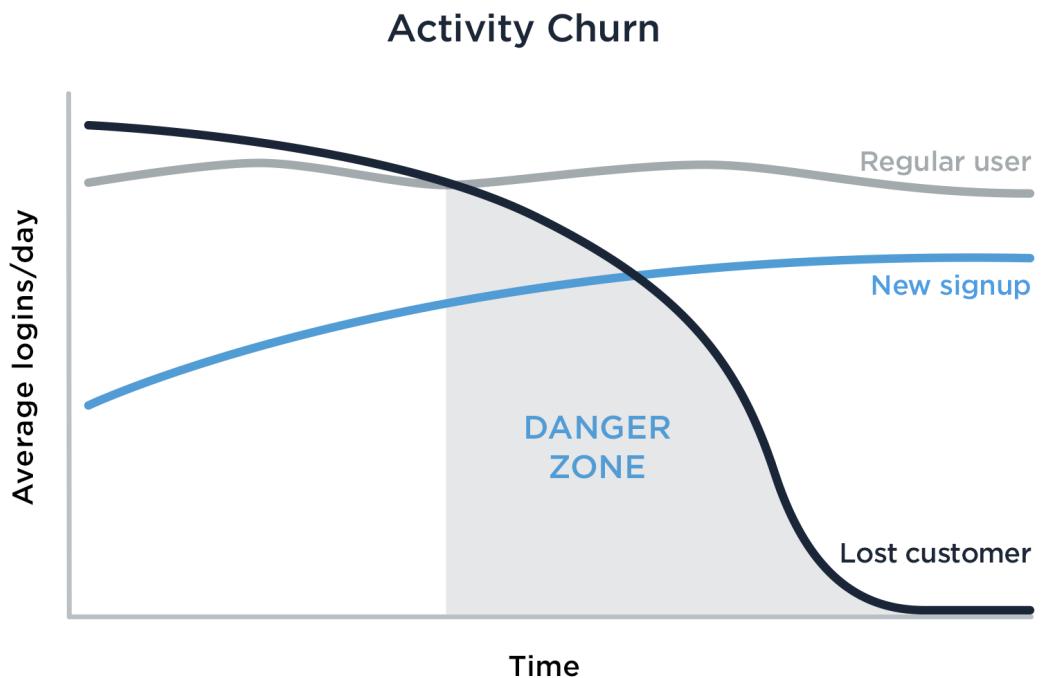
Retention message

Churn limits your product's growth. It's a problem all product owners experience. It's a simple truth not every user is going to stay active. Some will churn because your competitor is cheaper, some because they no longer have a need for your product; that can't be helped. But some will churn because either they never understood your product, or they felt that you never cared about them. These last two issues can be solved by regular customer contact.



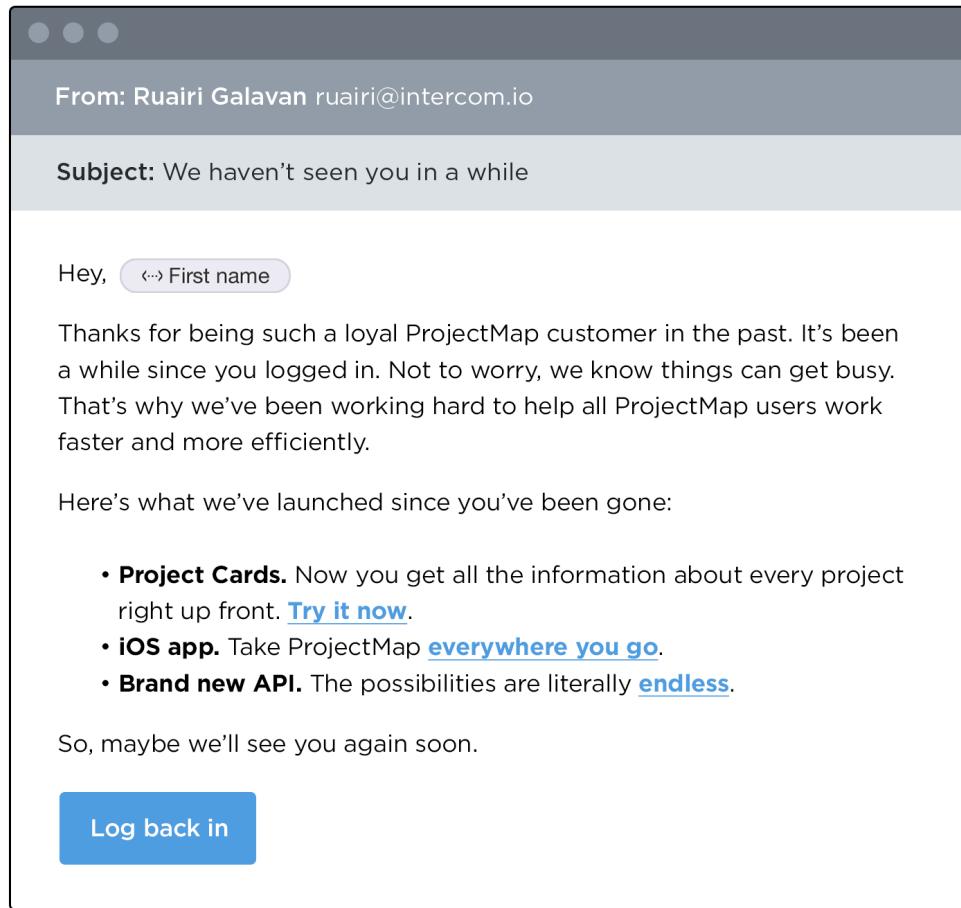
In this graph, three companies are all growing at the same rate, i.e. they're all acquiring customers at the same rate, but they all have varying churn rates, because they're all losing customers at different rates. Just as constant growth turns exponential, and is great for business, constant growth in churn rates turns exponentially bad.

So it's really important to get churn under control, or you're going to be in trouble. The difficulty is that once a customer cancels you're going to have a hard time convincing them to return. If you can spot churn as it's happening i.e. spot the “leading indicator” of a cancellation, you're still in a strong position to coax the customer back.



A customer you're going to lose will disappear over time i.e. they don't just vanish. What we're seeing here isn't a cliff. It's a gradual slope. These are people who haven't logged in in a while, but haven't canceled their subscription yet. This is activity churn i.e. somebody who is paying you money but has yet to cancel.

Activity churn is the leading indicator of account churn. And this is what you need to look out for. It's up to you to act before they quit. All you need to do is set up an automatic message that will be sent to any user that shows signs of slipping away (At Intercom, we'll message our users after 30 days of inactivity). The message should thank them for being a customer, and give them a compelling reason to return to your app, such as the launch of your new features.



Once this recurring message is sending, you'll start to see a percentage of your inactive users becoming active again.

Upsell/cross-sell message

The screenshot shows a simulated email window with the following details:

- From:** Ruairi Galavan ruairi@intercom.io
- Subject:** Are you ready to take things to the next level?

The body of the email contains the following content:

Hey,

Congratulations. You've now added 10 projects to ProjectMap, so we guess you've experienced the additional value that it brings to the process of project management.

Did you know that if you upgrade to our Premium Plan (an additional \$50 a month for you), there is no limit to the amount of projects you can run at the same time, or number of teammates that you can invite to collaborate with you.

You'll also benefit from:

- Access to all our third party integrations
- Unlimited archiving of projects
- Unlimited API calls

So what are you waiting for:

[Upgrade now](#)

If you have multiple pricing tiers or more than one product there are lots of opportunities for up- and cross-selling. Well-crafted, well-targeted messages are the first step towards maximizing those opportunities.

For products with a freemium model it makes sense to send an upsell message when a behavior milestone is reached that suggests the user is extracting real value from your product e.g. 500 pictures uploaded to a photo-sharing service, 100 private messages sent using a community app. Similarly if you have a suite of complementary products, when a customer is displaying signs that they are getting value out of their first purchase, it's time to contact them and explain how much better their lives would be with two of your products.

Chapter 3: Checklist

Time

- Have you contacted these customers recently?
 - In the last 24 hours?
- Will this message arrive at a time when people can take action?
- Will this message appear alongside other, more important, messages?
- Should all your customers receive this message at the same time?
- Have you considered sending the message at different times in different geographies?
- Will this message be relevant and make sense to all customers?
 - Do they need to have reached certain milestones with your product to understand it?
 - Are you only sending it to customers who have reached those milestones?
- If you're setting this up as a recurring message will it still make sense in a week's time?
 - A month's time?
 - 6 months' time?

Place

- Is email the right medium for this message?
- Do you need the recipient to take action in your product?
 - Does an in-app message make more sense?
 - Would a push notification make more sense?
- Will this message arrive in a medium where they can take action?
- Have you considered the level of interruption this message will cause?
 - Does the importance of the message warrant that level of interruption?

Chapter 3: Quiz

Quick recap? Here's the last quiz.

1. When should you hand someone a flyer advertising a new pizza joint?

- A. right after they've eaten sushi
- B. when they're broke
- C. when they're hungry
- D. when in Rome

2. Where should you communicate peripheral features?

- A. social media
- B. FAQ
- C. documentation
- D. in-app message

3. What should be the goal of your first message to new users?

- A. to welcome them and make them feel loved and appreciated
- B. to get feedback
- C. to convince them to upgrade their plan
- D. to nudge them towards a high-impact activity, like signing up for a webinar

4. When's the best time and place to send a mass request for feedback?

- A. email inbox, right after canceling
- B. while they're using the app
- C. email inbox, shortly after signup
- D. never

5. What's the best indicator of an account that's about to churn?

- A. reduced account activity
- B. internal champion leaves company
- C. degraded plan
- D. company stops responding to messages

Answers: 1. C, 2. d, 3. d, 4. b, 5. a

Conclusion

We firmly believe real customer engagement comes from communications with the people who are using your product. Opening your business up to regular interactions with customers can be daunting, and certainly raises more questions. What if a customer replies? How will you handle the replies? How do you strike the balance between being helpful and being annoying? Will you be engaging?

None of those things happens by accident or because a company happens to have hired people with good writing and communications skills. They need careful planning - from establishing your tone and voice to drawing up a message schedule. Now that you've made it this far, it's up to you to implement the lessons learned and make your messaging strategy your own.

We'd love to hear how you fare with these strategies. Let us know on our blog [Inside Intercom](#) where we share our latest thinking, not just on customer engagement, but on a range of topics that impact internet businesses such as product management, design, customer success, and marketing.

We hope you've learned some useful tactics for deepening your relationships with customers and having those conversations at scale. If you have, we'd love if you told your friends about this book, so they can benefit from it as well:

[Facebook](#) | [Twitter](#) | [LinkedIn](#)

About Intercom

Our mission is to make internet business personal. We do this by making it easy for web and mobile businesses to communicate with their customers, personally and at scale.

A simple, integrated platform for your entire business to see and talk to customers, Intercom can handle every customer interaction:

- **Sales** teams use Intercom to acquire customers.
- **Marketing** teams use it to onboard new customers and retain existing customers.
- **Product** teams use it to get quality product feedback from the right customers.
- **Support** teams use it to help customers.

Want to learn more? Visit us at www.intercom.io to start a free trial or chat with someone on our team about how Intercom can help.

Why not download our first book?



Drawing from some of the best posts on our blog, [Intercom on Product Management](#) offers guidance on the tough decisions you need to make as a product manager.

“Consistently brilliant writing that should be on the “must read” list for anyone driven to build great products.” - Dharmesh Shah, Founder/CTO of HubSpot