

Invitation Report: Usage Instructions

Purpose: understand the adoption of the product from the initial invitation stage to initial user behavior once the account has been created

Table of Contents

1. Invitation Acceptance:

An overview of acceptance rate of invitations includes a breakdown by invitation status and invitations by customer

2a. Invitation: by email delivery status

A breakdown of the invitation acceptance rate based on accompaniment of an email from the platform or not

2b. Invitations: by lag days from invite to accepted

A breakdown of the average number of days between when an invitation was sent to when the user account was created based on accompaniment of an email or not

3. User Behavior: post invitation

An overview of the % of total users who have ever logged in, % of users logged in within the past 30 days, and the % of new users who have logged in month over month

Glossary

Invitation Terminology

- **Invitation:** an open invitation to create a user account in the system. An invitation does not mean a user exists in the database. A user must accepted the invitation and complete the account create process to become a user.
- **Accepted:** A user has accepted the invitation and created an account (this does not mean they have logged in)
- **Pending:** A user invitation has been created and has yet to be accepted. A user has 30 days post creation date to accept the invitation before it expires
- **Expired:** an invitation is marked as expired if it is not accepted within 30 days of the creation date

Lag Days Terminology

- **Lag:** days between when the invitation was created and it was accepted
- **% Logged In:** % of total users that have ever logged in
- **% Logged In (Last 30 days):** % of total logged in users that have logged in within 30 days of today

Invitation Acceptance

Customer ▾

Invitation Created D... ▾

Role ▾

Email Status ▾

Total Invitations

34,623

Accepted Invitations

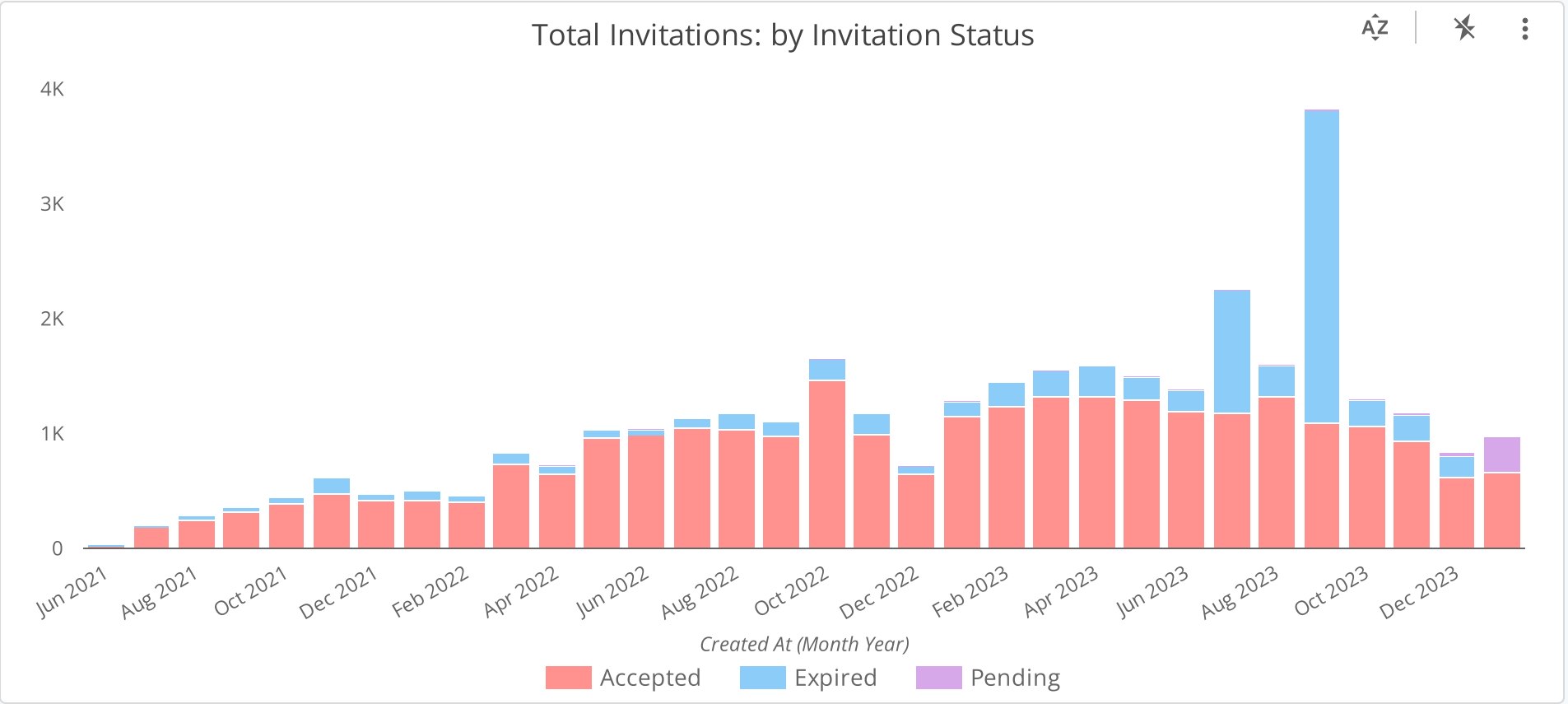
26,675

% of Invitations Accepted

77.04%

Avg Days: Invite to Accepted

6.55



Users have 30 days to accept an invitation once the invitation is sent. This is the cause of the higher number of pending invitations in recent months

Customer	Pending Invitations ▾	Expired Invitations	Accepted Invitations	% of Invitations Accepted	Total Invitations
a4bfd	2	0	0	0%	2
6ee94	1	0	0	0%	1
0c524	1	0	0	0%	1
56dbd	1	0	0	0%	1
aaed5	1	0	0	0%	1
d0018	1	0	0	0%	1
20320	1	0	0	0%	1
464ee	1	0	0	0%	1
c29e2	1	0	0	0%	1

1 - 100 / 34049 < >

Invitation Email Acceptance

Customer

Invitation Created D...

Role

Email Status

Invitation Reminder Emails

98

Accepted with Email

49

% of Invitations Accepted

47.12%

% of Invitations Accepted

47.12%

Dataset only includes emails from 2023-02-16 to present

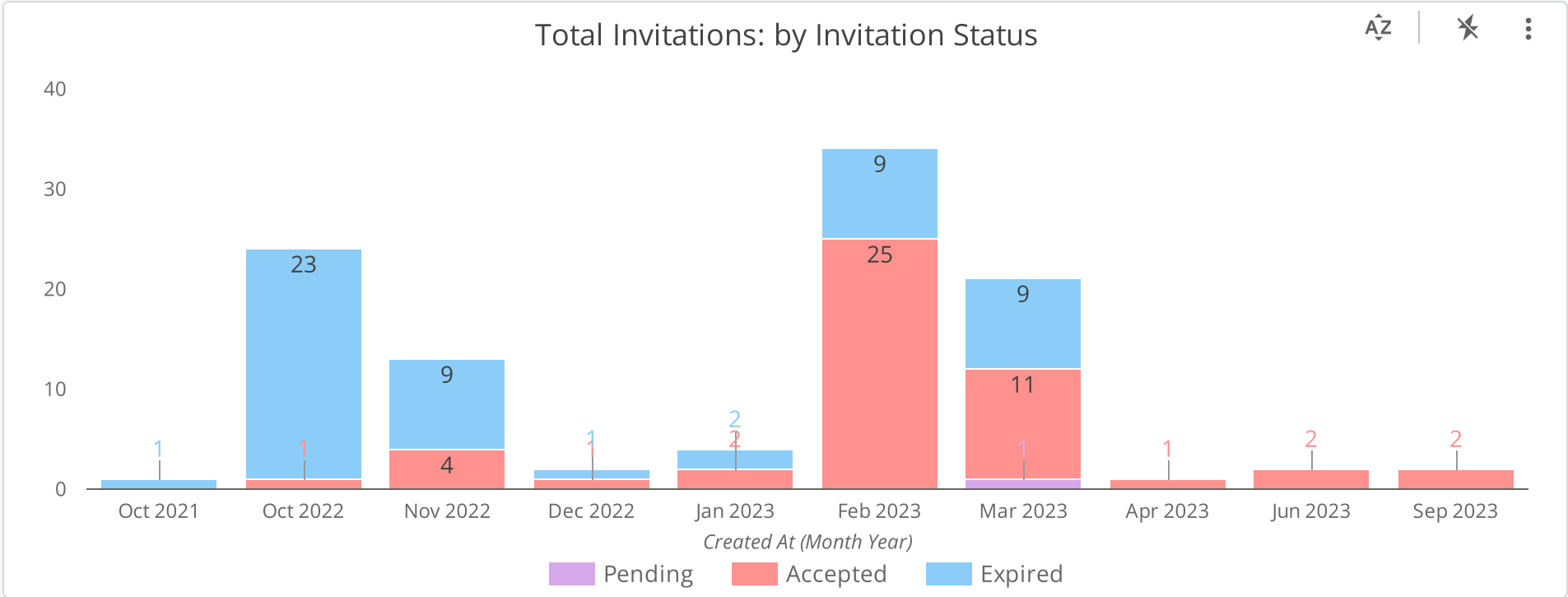
Accepted with Email: the user received an invitation reminder email, opened the email and created their account >= 7 days after the initial invitation was sent

% Opened

31.73%

% Clicked

32.69%



Users have 30 days to accept an invitation once the invitation is sent. This is the cause of the higher number of pending invitations in recent months

Customer	Total Invitations	Count of Emails Sent	Accepted Invitations attributed to Email	% of Accepted Emails with Invitation Sent	Open Count	% Opened	Click Count	% Clicked
27098	1	2	0	0%	9	100%	4	1
2e05d	1	1	0	0%	0	0%	0	0
86ffb	1	1	0	0%	1	100%	0	0
073ab	1	1	0	100%	0	0%	0	0
0a039	1	1	0	0%	1	100%	0	0
20cf6	1	1	1	100%	8	100%	0	0

1 - 100 / 34049

Invitation Acceptance Rate: Month over Month

Customer

Invitation Created D...

Role

Email Status

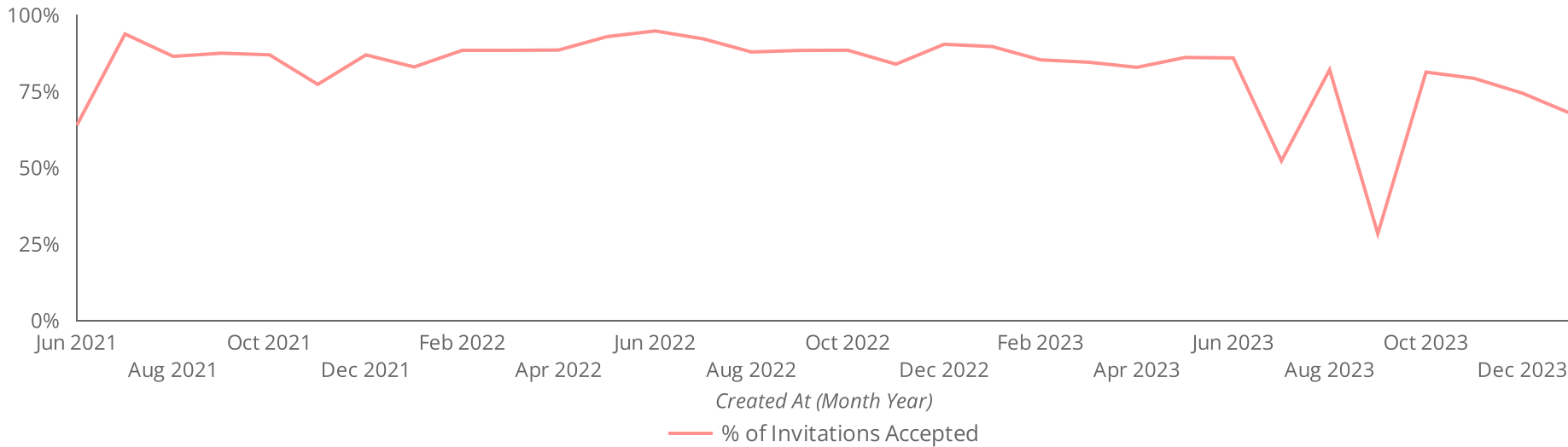
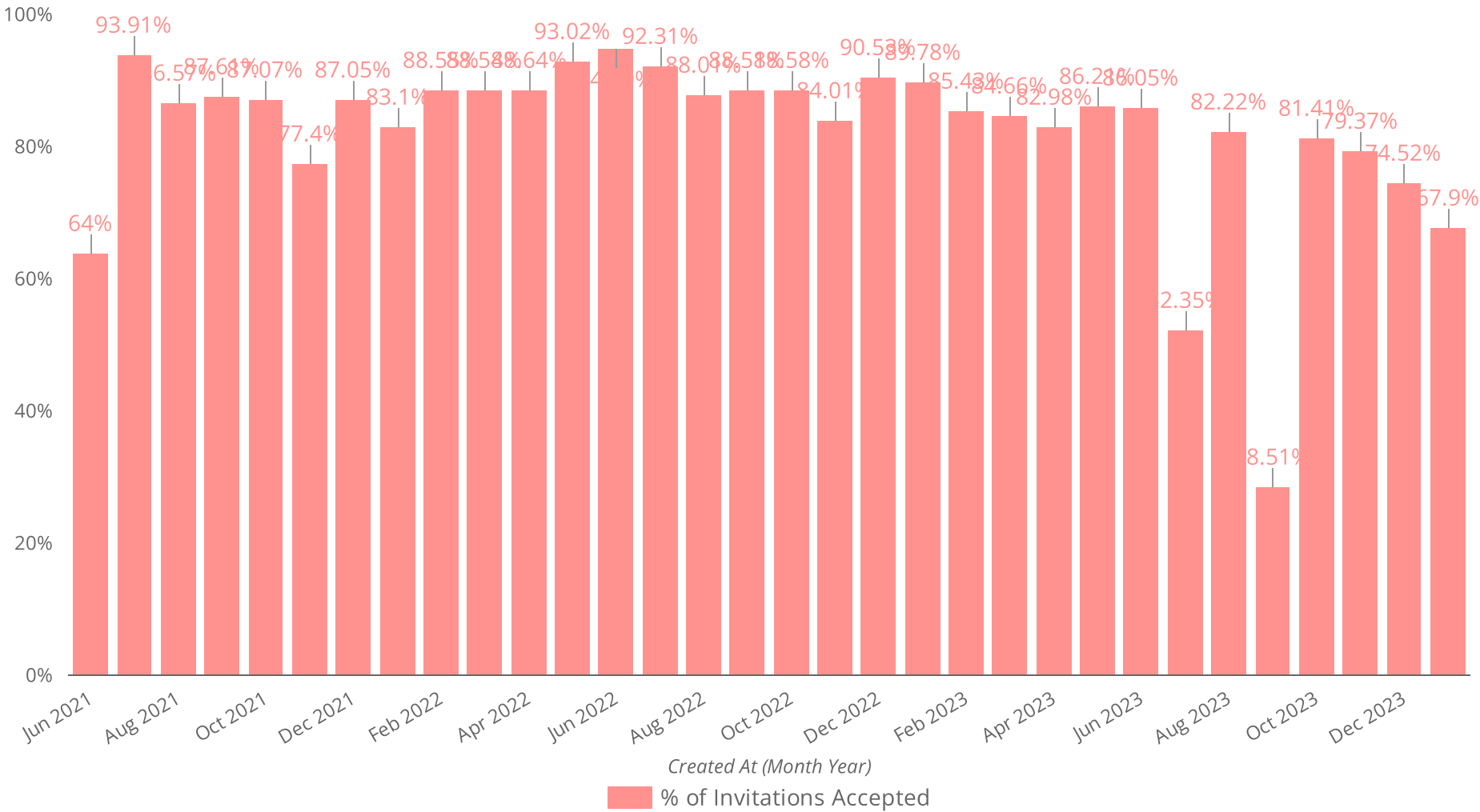
% of Invitations Accepted

77.04%

To use the following report for User Activation:

- Filter the role to only a specific user
- Filter the Email Status to delivered through platform only

Invitation Acceptance Rate: Month over Month

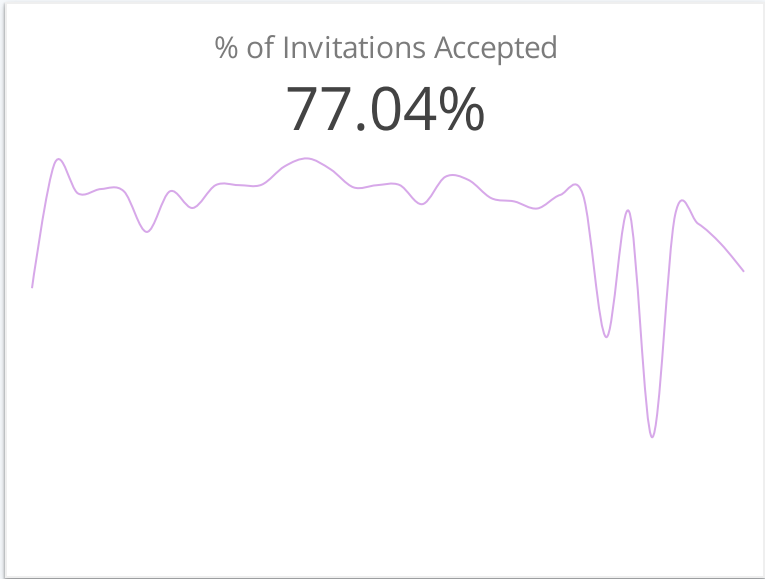


Invitations: by email delivery status

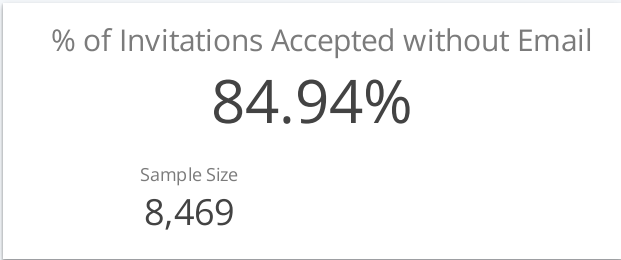
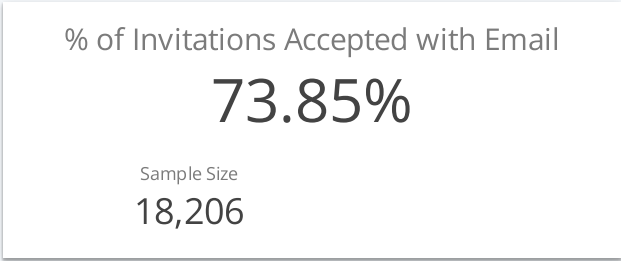
Customer ▾

Invitation Created D... ▾

Role ▾



A dip at the end of the chart is expected as it represents this current months of data. Users have 30 days to accept an invitation once it is sent out.



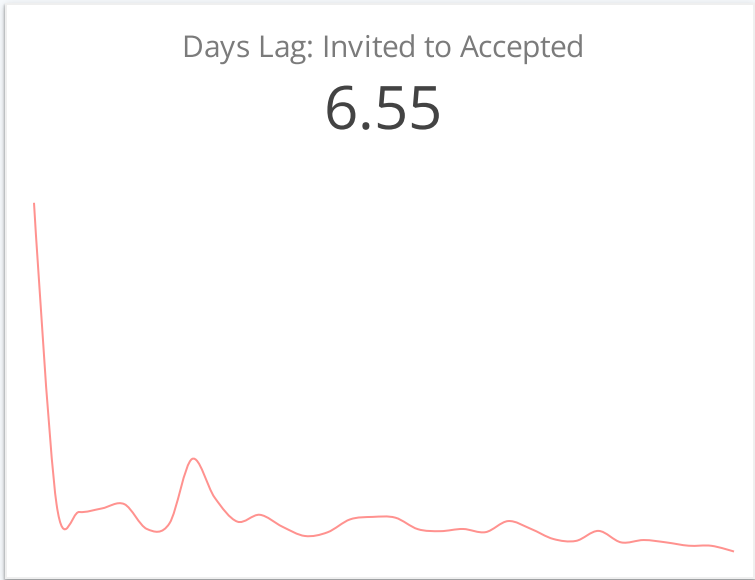
Invitation acceptance rates are similar when we sends out an invitation email vs when the customer takes responsibility for inviting users.

Glossary:

With Email: Invitation email was sent through platform

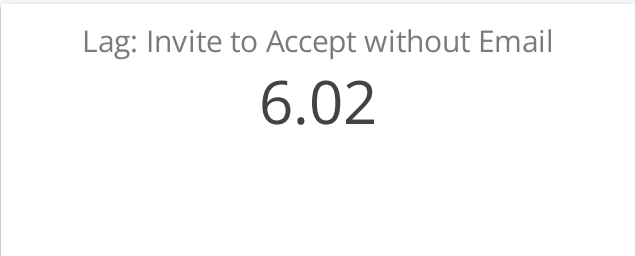
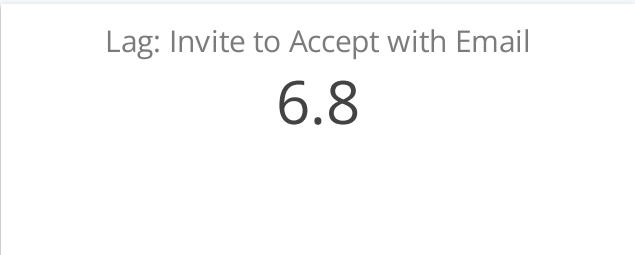
Without Email: Invitation email was not sent through platform

Invitations: by lag days from invite to accepted



The self serve invitation management feature was launched in the middle of June 2021. The spike we see at the beginning of the graph is due to the slow rollout of the feature and slow adoption.

The average number of days from when an invitation was sent out to when it was accepted has been trending down overtime.



When the customer owns the process of sending out a custom email to accompany the invitation, it adds additional work assigned to someone within their organization. This is likely the cause of the slightly higher number of lag days vs when the email is automatically sent out of the platform.

Glossary:

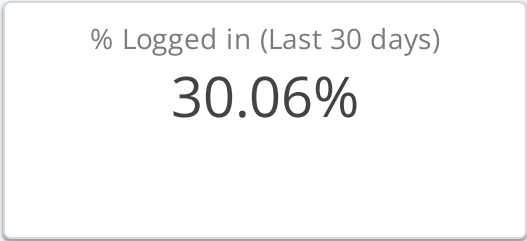
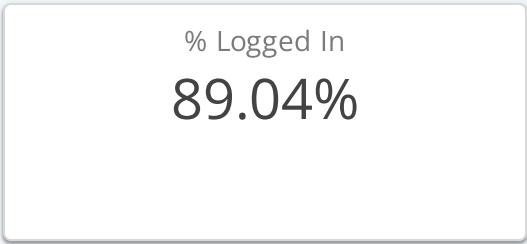
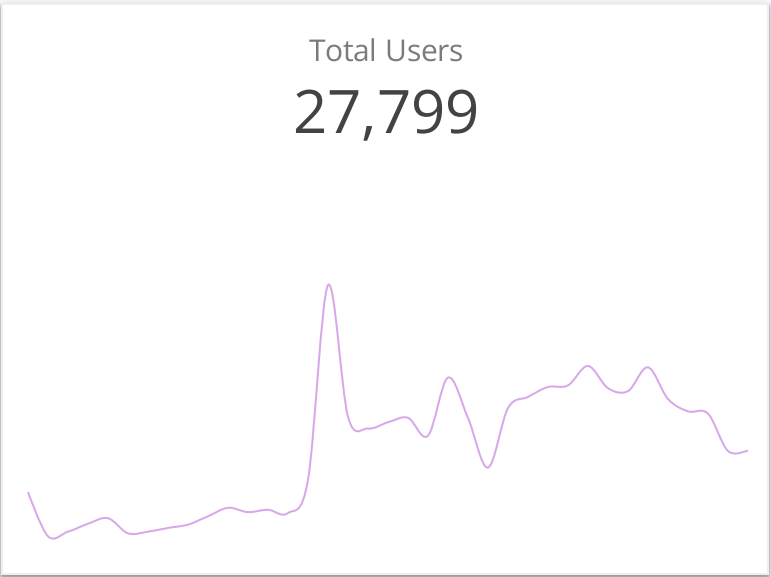
Lag: days between when the invitation was created and it was accepted

User Behavior: post invitation

Customer

User Created Date

Role

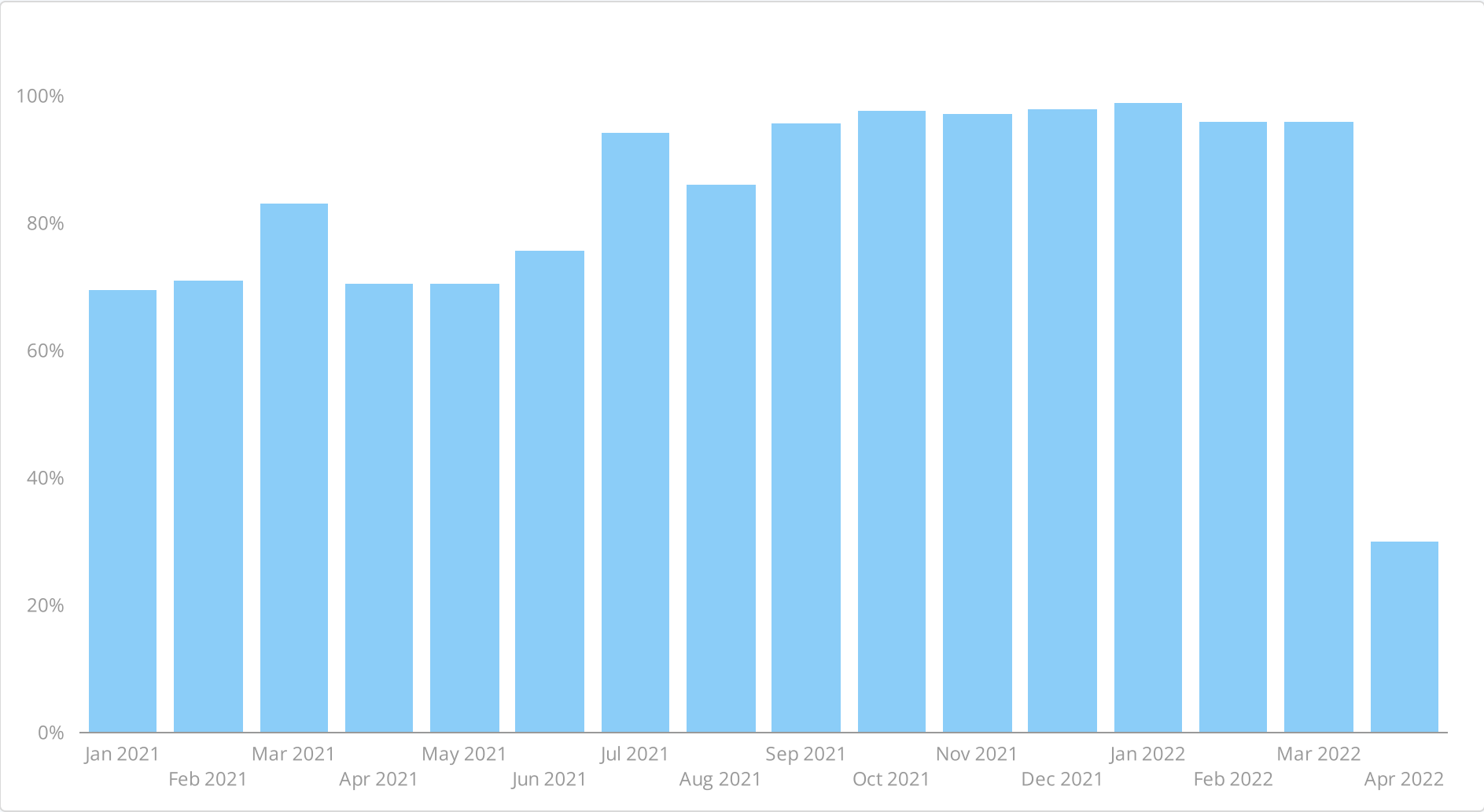


Glossary:

% Logged In: % of total users that have ever logged in

% Logged In (Last 30 days): % of total logged in users that have logged in within 30 days of today

% of Logged In Users: Month over Month by User Created At Date



This graph represents the % of users created in each month that logged in at least once. For example, in the month of August 2021, 81% of all users created within that month have logged into the platform at least once.

User Activity

Customer

Role

Avg # of Days per Month a User is Seen

5.38

Average # of Events per Session

21.56

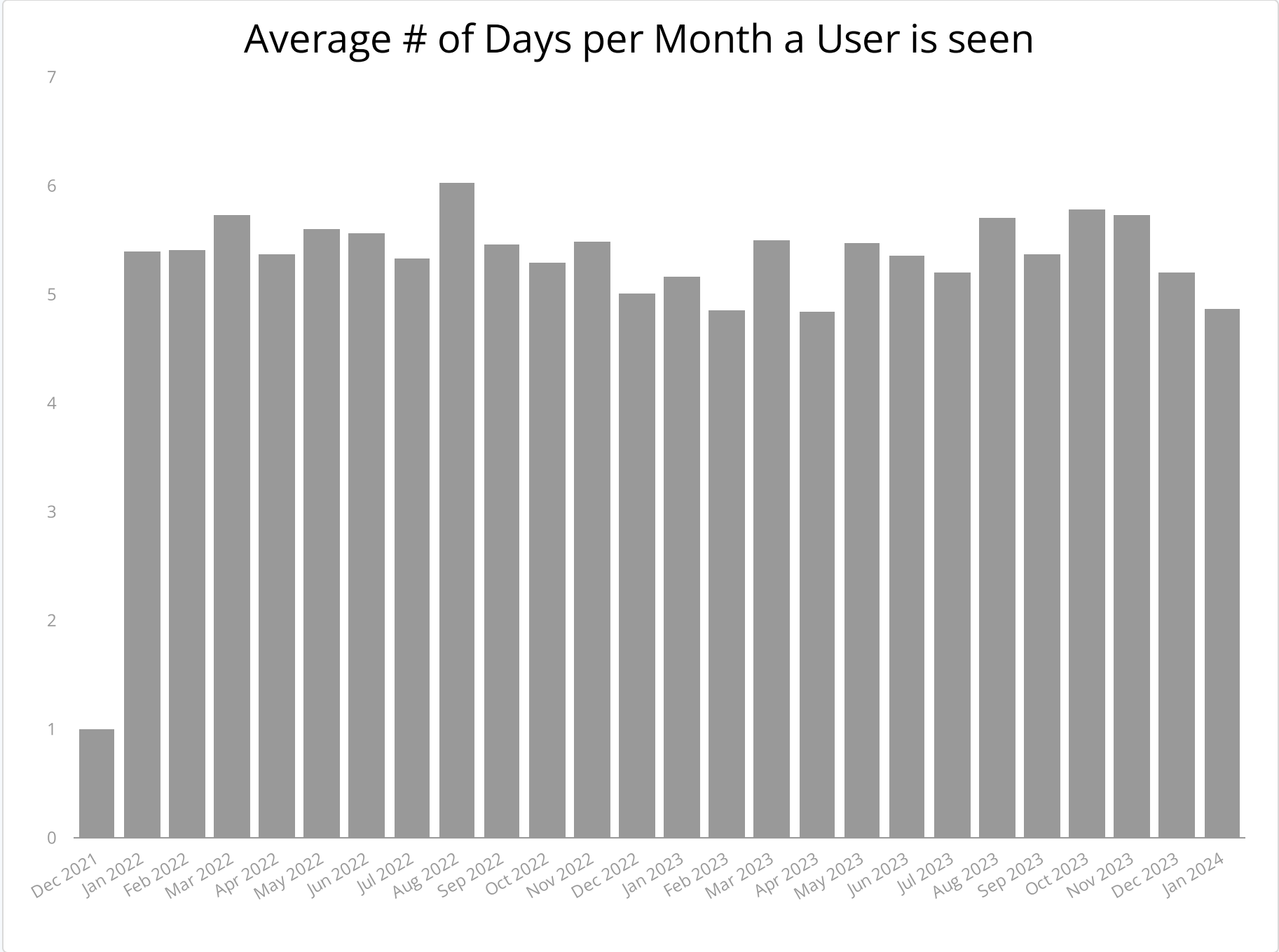
Average # of Days per Month: average number of days in a given month a user completes a minimum of one event

A User is Seen: any event counts as seeing a user (ie. a page load, a click, a log in)

Event: An action a user takes in your product

Session: A period of time that a user has your app in the foreground. By default, events within five minutes of each other are combined into a single session on a mobile app. On web, events within 30 minutes of each other are combined into a single session.

Average # of Days per Month a User is seen



This graph represents the average number of days a user was seen on the app within the given month. A day is only counted once regardless of the number of times a user visits the application on that given day.