The Nurture Starter Kit

How to get new customers beyond the free trial

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01
Introduction

These days getting users to sign up to a free trial is easy. The hard part is converting them into long-term, loyal customers. To do that, you need to nurture new signups throughout their free trial. In the same way a gardener wouldn't plant some seeds and abandon them to the elements, you need to constantly observe and adapt to your fledgling new signups before they wither and die.

Traditionally, this has been done with a series of scheduled messages. You set up a drip campaign, where a message is sent on day 1, day 7, day 14 etc. The problem? These one-size-fits-all message schedules treat all new signups as a homogenous blob and ignore how they're actually using your product. For example, your schedule might make total sense for someone successfully advancing through the free trial, but ignores someone who logged in once and never came back. Fortunately there's a better way.

At Intercom, we tackle this using behavior-based messaging campaigns which adapt to the actions customers take, at different times and in their own unique order. It means that every new signup will get the messages that are right for them, giving you the best chance of driving them towards conversion. Read on to find out how to set up a campaign that will get new signups through those all important first few hurdles.

02

What a good nurture campaign looks like

Drive people towards a common goal bysending each individual the perfect series of email, in-app,and push messages based on their unique behavior.

The activation message
Push notification

Welcome message
Email

The end of trial message
Email

Derek
• Signs up for a free trial
• Slow & unengaged
• Needs a lot of encouragement

The abandoned signup message
In-app

The social proof message
In-app

The windback message
Email

PAYING CUSTOMER

Welcome message
Email

The milestone message
In-app

Sharon
• Signs up for a free trial
• Motivated & unengaged
• Needs a little encouragement

The activation message
Email

03
Messanging campaigns best practices

Target users based on time

Space messages out and send them at specific time intervals. For example, you could send your first message to users who started a trial 2 days ago, the next to users who started a trial 10 days ago.

But target based on behavior too

Take what you know about when your users' signed up and combine it with what they are doing in your product. That's your recipe for success. For example, trigger messages based on actions (e.g hasn't used feature X).

Avoid conflicting messages

Make sure two different groups of users don't get the same message. You won't want to send active users the same conversion message as users who are slipping away. (You can use "Received message X is false" in Intercom).

Use signals on other messages to send follow-ups

Use signals from the messages you've previously sent to determine which message is sent next. If people didn't click on a link or didn't open your last in-app, try sending them an email or push message to bring them into the product.

Keep it simple at first, add complexity gradually

Take it slow and build complexity into your nurturing campaign. It's easy to get overwhelmed if you create the most sophisticated campaigns straight off the bat and try cover every potential use case. Start with a simple nurture campaign of 4-5 messages.

Message people in the right place

Trying to get people to complete the final stage of sign up? Use email. Want to get someone to interact with a specific feature? Use in-app so it's in context. Make sure you're also messaging people at the right place in your app.

04
What messages should I be sending?

The welcome message – in-app

All of the data we have says that in-app welcome messages are more likely to be read, clicked on, and responded to than any other message. In the same way a maître d' sets the tone for your whole experience when you enter a high-end restaurant, a welcome message sets the tone for your product. Get it wrong, and it's likely the whole experience will be ruined.

A welcome message also gives you a chance to dig deeper into what's motivating new signups to use your product. You'll quickly get a clear picture of the kinds of things new signups are trying to do which will help you understand how you can best get them there.

At the very least, your users will know that they have a direct line to your sales and support team, and they'll be less likely to quit if they hit a snag.

Katarina from Intercom

Hi Karen, we're excited that you started your free trial! 🎉

Tell us what you'd like to see from Intercom during your trial and we'll help you do it 😊

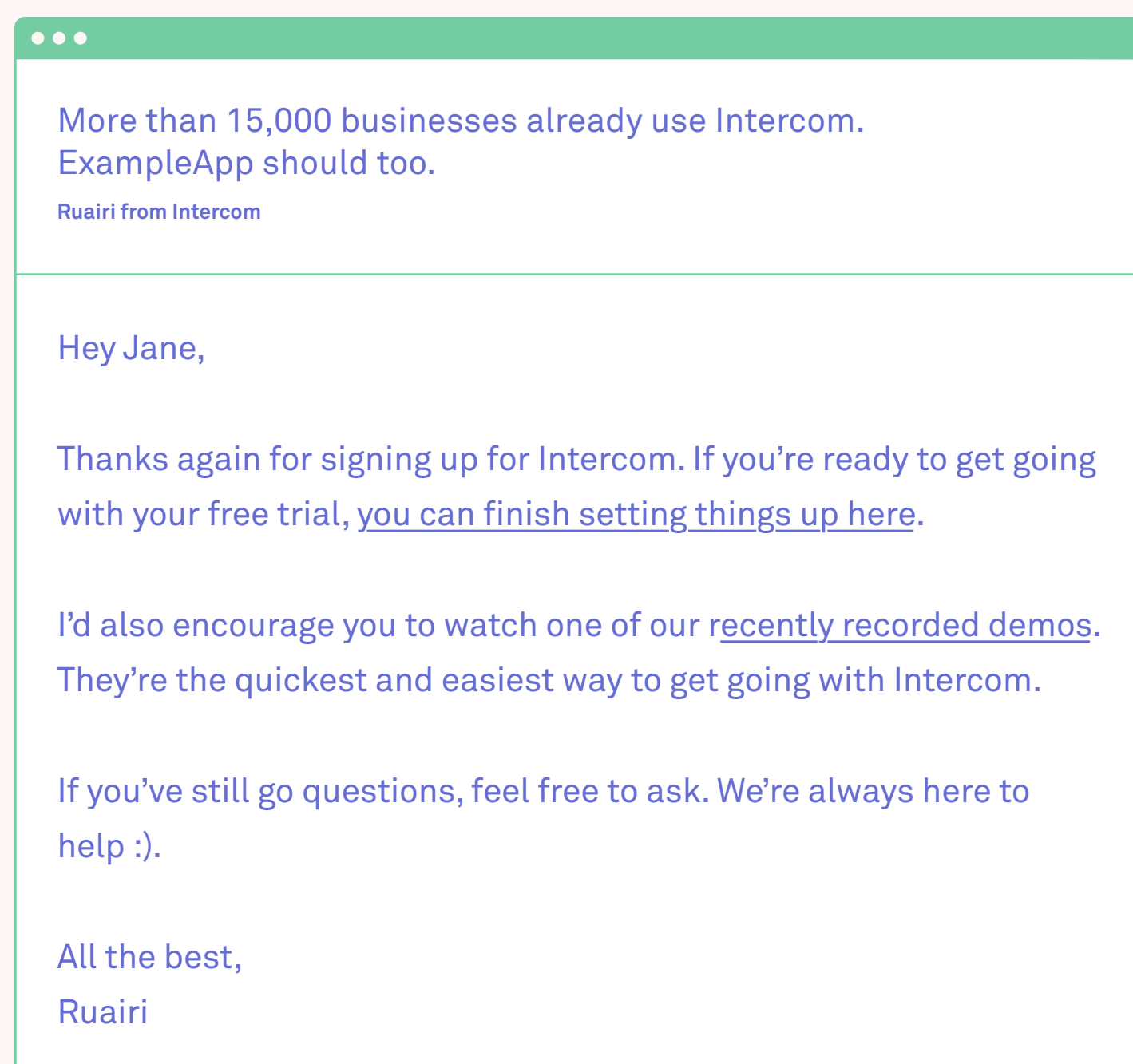What are your goals for the free trial?

Reply to Katarina

Pro Tip:

You can send more than one welcome message. The first time someone logs into your app (use a filter web sessions is < 1) is a great opportunity to set them on the right path. Similarly, right after they signup, users are expecting to receive an email from you, so introduce yourself and show the real person behind your product.

The abandoned signup message – email

There's a common misconception that sales works like a chain reaction. See --> want --> install --> pay --> happily ever after. Life doesn't work like that. You're competing against the powerful forces of life, like distraction and busyness so your customers need a little nudge, if not outright persuasion.

Enter the abandoned signup email. If you've ever installed a product only to promptly close it and never look at it again, you've probably received an email like this. They're great for reminding new signups to finish setting up your product so that they can start their march towards victory.

More than 15,000 businesses already use Intercom. ExampleApp should too.

Ruairi from Intercom

Hey Jane,

Thanks again for signing up for Intercom. If you're ready to get going with your free trial, you can finish setting things up here.

I'd also encourage you to watch one of our recently recorded demos. They're the quickest and easiest way to get going with Intercom.

If you've still go questions, feel free to ask. We're always here to help :).

All the best,
Ruairi

Pro Tip:

Keep your subject line personal with company name variables and make sure you outline a clear next step – demo, webinar etc – so they're less likely to abandon your product again.

The activation message – in-app

When someone signs up to your product, it's important to make sure they're performing the high-value activities in your product as soon as possible. These 'successful moments' will differ for every company – for Intercom it's importing custom data – but here's a very easy way to find yours.

Ask yourself, what does a successful customer look like? What are they doing in your product? Work backwards from that ideal customer, asking 'How were they able to do that?' Following these steps and you'll identify the ultimate causes of success. That moment is what you need to activate.

Ka ia from Intercom

Hi Jim,

I noticed that you have not added your customers to Intercom yet.

Providing ina pp support to your users through Intercom can reduce churn by 14% 😍

What are your current customer support goals? Let's explore how Intercom can help you achieve them.

Reply to Karia...

Pro Tip:

Depending on your product, some activities will need to be taken in a particular order e.g. adding payment details before you can import data, while others might be secondary actions that can be performed at any time e.g. inviting a colleague to sign up to the product. Order your messages according to their priority to your product.

The milestone message – in-app

Your product should (hopefully) improve people's lives in its own particular way. The next step is to define the bare bones milestones users must complete to begin experiencing that better life. If I bought a grill, it could be cooking up my first steak. In Slack's case it could be inviting five teammates to the product.

After defining these milestones, recognize how your users are becoming that better version of themselves. A timely in-app message is a positive feedback mechanism that lets people know "Congrats! You've done X, Y, and Z. Now you're three steps closer to why you signed up in the first place." If customers feel like they're making progress, they're much more likely to go beyond the free trial.

Karia from Intercom

Hi Stacy,

Congrats on fully integrating Intercom 👏

Now that all the technical work is done you can focus on engaging your users.

Read our book, *Intercom on Customer Engagement* to learn all about the messages you should be sending.
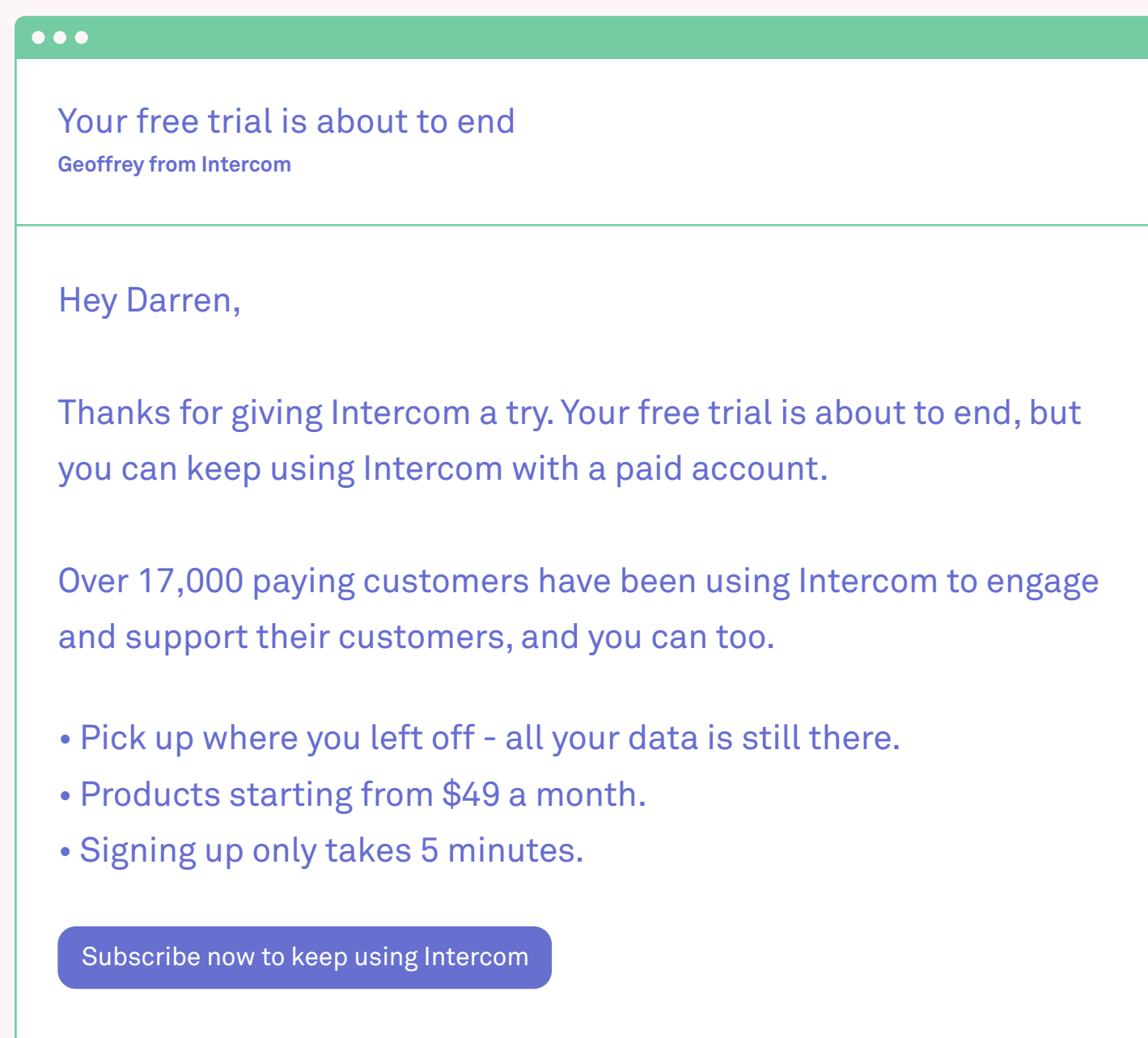
Reply to Karia

Pro Tip:

Customize your content for each audience. Add variables to your messages like the number of songs your users have uploaded or the number of photos they've shared. That way your message will be personal and relevant for each customer who gets it.

The social proof message – in-app or email

One of the best ways to nudge new signups towards success is by using stories from existing customers. Marketers call it social proof: when we see lots of others doing something, we assume that that's the correct behavior.

The secret ingredient in messages such as this is being specific about the problem your product solved has solved for other companies, and the problem they're facing too. Specificity about a problem demonstrates to the reader not just that your product is generally good (that's not enough), but that you can solve their problem. Touch that nerve, and your customers will quickly see how your product can work for people just like them.

Katarina from Intercom

Hi Ben,

Expensify reduced response times by 50% by using the Assignment Rules feature 😍

Is reducing response times a goal of yours? Share your Customer Support goals with me and let's see how we can hit them.

Reply to Katarina

Pro Tip:

To avoid annoying customers with too many messages in quick succession, you should specify how many days you'd like to leave between messages. We recommend selecting at least 2 days.

The end of trial message – email

People hate losing more than they love winning – and it turns out this very human tendency can impact the success of your business.

If you have a free trial for a SaaS product, the kind where an upgrade is required to continue, loss aversion naturally comes into play. You want to make sure new signups feel like they're losing something of value, increase their desire to keep using it, and be willing to pay for the ability to do so. The trick is making sure your message convinces the user that life without your product is a step backwards.

Your free trial is about to end
Geoffrey from Intercom

Hey Darren,

Thanks for giving Intercom a try. Your free trial is about to end, but you can keep using Intercom with a paid account.

Over 17,000 paying customers have been using Intercom to engage and support their customers, and you can too.

• Pick up where you left off - all your data is still there.
• Products starting from $49 a month.
• Signing up only takes 5 minutes.

Subscribe now to keep using Intercom

Pro Tip:

If a user still hasn't converted with just 2 days left on their trial, it's a good time to offer them a discount (e.g. 25% off their first three months if they sign up today). Your filter here would be something like 'Started trial 12 days ago' if your trial is 14 days.

The winback message – email

It's a simple truth that not everyone will see the value of your product during the first few weeks. You'll hear phrases like: "I couldn't find the time to get my head around it" and "I didn't see any immediate value."

Identify recent signups customers who didn't make it beyond the free trial and send them a well-timed, personal email to try re-engage them. The best case is that you recover a customer; the worst case is you learn why you users leave. Either of these leaves you in a better position than doing nothing.

See what's new in Intercom and take 10% off
Tom from Intercom

Hey Karen,

It's been awhile since ExampleApp used Intercom. In recent months we've made some great changes and additions, like our new Intercom Messenger, which offers a fast new way to communicate with your customers.

Check out our new messenger along with all of our other improvements, and receive 10% off when you reactivate your account today.

All the best,
Tom

Pro Tip:

Don't assume lapsed signups will remember who you are. Remind them who you are, and motivate them to return with an email featuring some of the features added in the past 30 days, or a discount as an incentive to return.

05
How to measure Success

How to measure success

A good nurture campaign starts with a clear goal, like "Did they convert to being a paying customer?" If a customer upgrades from a free trial to a paid account, it's usually a good indicator that they've gotten enough value out of the product that they feel it's worth paying for.

But you need to look closely at the individual messages in your campaign too. It's no good if customers convert to a paid account only to leave once they receive their first bill. Adding goals to the individual messages in your campaign is a great way of monitoring if people are getting through the most important checkpoints in your product. Have they used that all important feature? Are they performing the same actions as your most successful paying users? That way you'll be confident that those who do make it beyond the free trial will stick around longer.

Within a few days of setting your campaign live, we recommend that people jump into diagnostics mode. Some of your messages will have already sent to your new signups, so this is a good time to check to see if the campaign is behaving as you expected:

- Have the correct number of people entered the campaign?
- Did the message you expected to send first, send?
- Are you customers taking the expected actions following each message?
- If the answer to any of the above is no, you should revisit your campaign. The success of your campaign depends on your level of targeting, so keep tweaking and testing until you get it jusstttt right.

Customers will reach the goal you've set at their own cadence. For example, one customer could convert to a paid plan on day 2 of a 14-day free trial while others will ignore all of your messages and never convert. What's important is that you decide in advance how a customer will stop receiving your campaign. For example, in Intercom, people exit a campaign if they have hit the goal of the campaign, or received all live messages in the campaign.

06

Customer spotlight:

Educating and converting trial customers at Baremetrics

By Kaegan Donnelly, Customer Happiness at Baremetrics

At Baremetrics, we have a 14 day trial. Intercom's Smart Campaigns lets us communicate with and educate folks to make sure they see the true value of Baremetrics during those 2 weeks.

With Smart Campaigns, we send our new signups a series of emails and/or in-app messages 1⎯5 days apart until our goal is reached (or we run out of messages). You rank each message in order of priority, add your parameters to each message (e.g trial started at less than 14 days, last seen more than 5 days ago etc) and then Intercom handles the rest.

The beauty of Smart Campaigns is that you can set them up to send a combination of email and in-app messages. We've found that in-app messages perform better. They are more likely to be read, more likely to be actioned, and more likely to be replied to. Intercom kicks ass at this.

During the first 2 weeks, we use in-app messages to offer demos, check in to see how things are going, and highlight awesome features that folks likely won't find on their own.

Ka ga   from Baremetrics
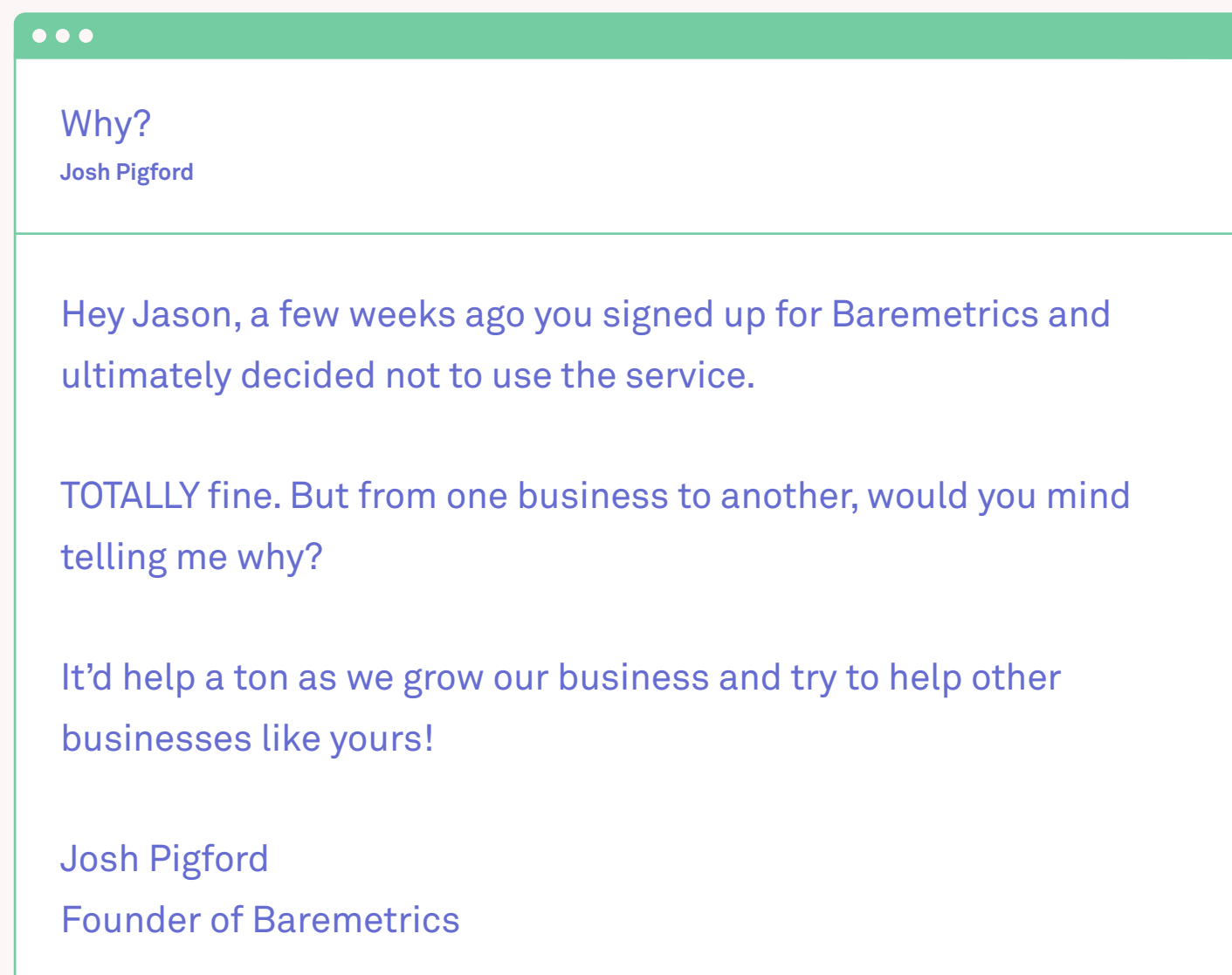
Hey Karen! How are things going with the trial?

G t any questions for me? Think you might jump on board? 🙂

Reply to Kaegan⎵

But often the struggle with trial customers is getting them into your app in the first place. We've all done it. Sign up for a cool looking new tool, have a look around, then get distracted and promptly forget all about it. That's where email comes in!

We use email to activate new signups who are slipping away and follow up with users who failed to convert into paying customers.

Why?
Josh Pigford

Hey Jason, a few weeks ago you signed up for Baremetrics and ultimately decided not to use the service.

TOTALLY fine. But from one business to another, would you mind telling me why?

It'd help a ton as we grow our business and try to help other businesses like yours!

Josh Pigford
Founder of Baremetrics

If you want new signups to stick around, you've got to keep communicating with them during the first few weeks. Intercom is one of the most powerful churn prevention tools you have at your disposal.