

Enhancing user experience to boost trial engagement

SALESFORCE 30-DAY TRIAL MARKETING REDESIGN





WELCOME

Presentation Focus

This presentation explores redesigning the 30-day free trial for marketing to improve engagement and conversion.

Current Trial Limitations

We analyze existing limitations of the trial experience to identify areas for strategic improvement.

Target Users

Focus on attracting marketing professionals and small business users through optimized trial experiences.

INTRODUCTION AND PROBLEM- STATEMENT



PROBLEM STATEMENT

Lack of Personalization

The trial offers no personalized experience, making it hard for users to connect with relevant features quickly.

Insufficient Guided Onboarding

Absence of guided onboarding causes users to feel overwhelmed and uncertain on how to proceed effectively.

Low Conversion Rates

Due to poor engagement and usability, many users abandon the trial, reducing potential customer acquisition.

USER PERSONAS AND PROPOSED SOLUTION



AFFECTED PERSONAS

Marketing Managers' Needs

Marketing Managers seek efficient tools to streamline campaign management and enhance customer engagement.

Small Business Owners' Needs

Small Business Owners require intuitive interfaces and quick onboarding for effective decision-making.

CRM Evaluators' Needs

CRM Evaluators look for comprehensive feature access and usability during trial evaluations.

Challenges with Generic Trials

Generic trial setups often fail to address specific workflows and industry needs of key personas.

OUR PITCH



Guided Onboarding

Interactive tutorials and industry-specific dashboards help users quickly grasp platform benefits during trial.

Contextual Help

Real-time assistance reduces user frustration and improves task completion throughout the trial experience.

Personalized Sample Data

Sample data tailored to user's business scenario helps visualize platform application and value clearly.

Enhanced User Engagement

This approach aims to boost user satisfaction, engagement, and increase conversion to paid subscriptions.

SUPPORTING RESEARCH AND DESIGN MOCKUPS

SUPPORTING RESEARCH

Impact of Trial Reminders

Conversion trends lower as trial length increases, but more complex systems benefit from more opportunities to explore . To balance these challenges, spaced repetition of trial reminders can be implemented to retain user interest .



User Feedback and Personalization

Incorporating user feedback and personalized experiences boosts satisfaction and retention in onboarding .

Interactive Tutorial Success

Platforms like AWS and Azure use interactive tutorials and contextual help to enhance user onboarding. Further supported by experiential learning research.

DESIGN MOCKUPS

Simplified Navigation Interface

The trial features a streamlined navigation design for easy access to key functions.

Interactive Tutorials

Guided tours highlight essential features to help users quickly understand the platform.

Industry-Specific Dashboards

Dashboards are tailored to roles like marketing managers and small business owners with relevant tools.

Contextual Help and Support

Embedded tips and support appear contextually to assist users throughout their experience.



Information Pop-up

The screenshot shows a Salesforce interface. On the left is a dark sidebar with icons for Home, Contacts, Accounts, Sales, and Service. The main area has a blue header with a cloud icon and the word 'Marketing'. Below it, the 'Contacts' tab is selected, showing a list titled 'All Contacts' with 2 items. A blue callout box is overlaid on the screen, pointing to the 'Contacts' tab. The text in the box reads: 'Contacts are individual people you communicate with to move a business deal forward. They are often associated with accounts, which represent the companies you are doing business with.'

	Name	Account Name
1	CORREY EIFLING-PATTERSON	test idp
2	correy Katkade	made up company

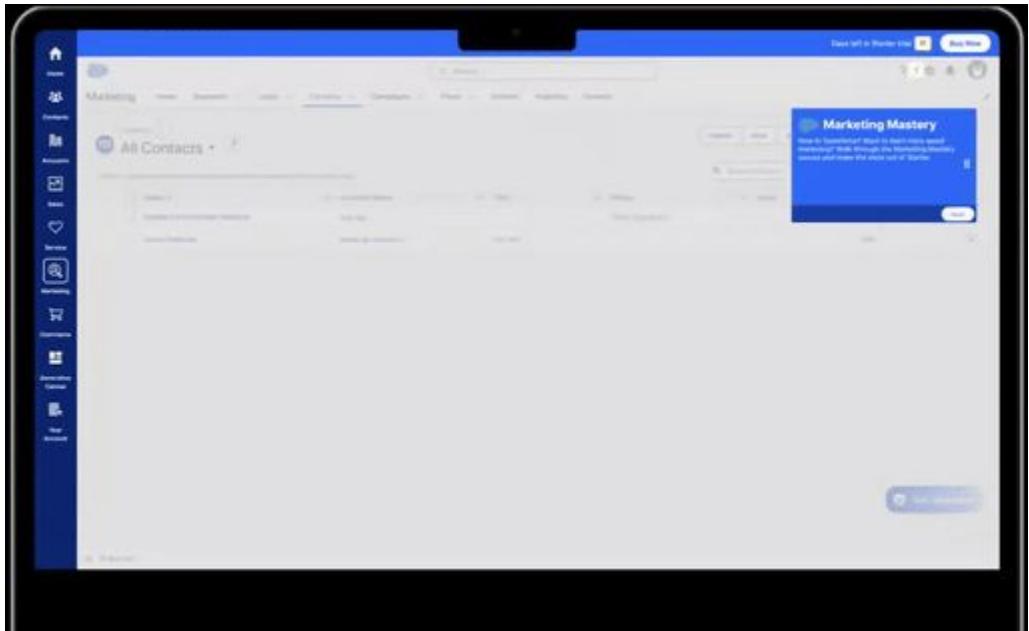
BENEFITS

- Reduce onboarding friction for new users
- Enhance discoverability of features
- Adaptable for accessibility

INSIGHTS

- Built on top of the guidance center
- Provides a clear beginning to end training process
- Provides the user with visual and experiential learning opportunities
- Easily repeatable to help users retain skills

Mastery Course



[Prototype](#)

Mastery Course – A Closer Look

The screenshot shows a 'Guidance Center' interface for 'Marketing Mastery'. It features a sidebar with 'Import', 'New', and 'Add to Campaign' buttons, and a search bar. The main area has three sections: 'Objective 1: Contacts' (Tasks: Add a contact, Import a contact, Edit a contact), 'Objective 2: Leads' (Tasks: Add a lead, Change status, Integrate into a campaign), and 'Objective 3: Campaigns' (Tasks: Create a campaign, Plan it out, Activate). At the bottom is a 'Unit Progress' bar and an 'Ask Agentforce' button.

Ordered sections

The screenshot shows a 'Guidance Center' interface for 'Marketing Mastery'. It includes a 'Consent' header and a 'New' button. Below is a 'Add a contact' task card with 'Step 1/4' and a 'Tasks' section: 'Add a contact' (selected), 'Import a set of contacts', 'Edit a contact', and 'Reach out to a contact'. At the bottom is a 'Section Progress' bar and an 'Ask Agentforce' button.

Experience-based tasks

The screenshot shows a 'Guidance Center' interface for 'Marketing Mastery'. It includes a 'Import' button and a 'New' button. Below is a 'Search this list...' field and an 'Email' button. The main area lists three objectives with checked checkboxes: 'Objective 1: Contacts' (Tasks: Add a contact, Import a contact, Edit a contact), 'Objective 2: Leads' (Tasks: Add a lead, Change status, Integrate into a campaign), and 'Objective 3: Campaigns' (Tasks: Create a campaign, Plan it out, Activate). At the bottom is a 'Unit Progress' bar and an 'Ask Agentforce' button.

Unit-based and repeatable

Marketing Automation Pop-ups

From 30-Day Trial to Paid Conversion



A strategic framework for guiding users through their trial journey with perfectly timed, value-driven pop-up messages that boost engagement and conversion rates.



A link to the 'pop-up' design figma files imported to a pdf: [Link](#)

The Free Trial Conversion Challenge

Average Trial-to-Paid Conversion Rate

Most SaaS companies struggle to convert their trial users to paying customers, leaving significant revenue potential untapped.

Key Conversion Challenges

- Users fail to experience core product value
- No clear path to follow during trial period
- Low engagement after initial sign-up
- Insufficient urgency as trial end approaches

The Opportunity

Strategic pop-ups can increase trial conversion by guiding users to value, building habits, and creating timely conversion triggers.

Trial Sign-ups

100%

Completes Onboarding

65%

Active Usage

40%

Feature Exploration

22%

Paid Conversion

8-10%

Best Practices for Trial-to-Paid Conversion

Deliver Value Quickly

- Streamline onboarding to core values in under 5 minutes
- Use interactive walkthroughs instead of passive tutorials
- Focus on one primary action per pop-up message

Target & Segment Effectively

- Personalize pop-ups based on user behavior & activity
- Adjust messaging based on trial engagement level
- Identify & target high-potential users with special offers

Build Conversion Momentum

- Use progress bars to visualize trial advancement
- Celebrate milestone achievements with positive feedback
- Create urgency with time-sensitive offers near trial end

Optimize Design & Messaging

- Keep messaging concise with clear value proposition
- Test timing & triggers for optimal engagement

Strategic Timing

Display pop-ups at key decision points: activation, feature discovery, and pre-expiration (3-5 days before trial end).

Clear CTAs

Use action-oriented language that makes the next step obvious and removes friction from the conversion process.

Social Proof

Incorporate testimonials, user counts, or success stories to reduce uncertainty and build trust.

Demonstrate ROI

Show personalized metrics and results achieved during the trial to justify the investment in upgrading.

* Combine with email onboarding as well for maximum results

Strategic 30-Day Trial Journey Framework

The Guided Path to Conversion

Phase 1: Activation (Days 1-7)

Focus on quick wins and core functionality mastery. Deliver immediate value through guided onboarding that establishes product relevance.

Phase 2: Value Realization (Days 8-20)

Showcase advanced capabilities and integration possibilities. Encourage habit formation through regular engagement triggers.

Phase 3: Conversion (Days 21-30)

Leverage scarcity principles and highlight accomplishments. Create urgency while reinforcing the value already received and future potential.



Day 1

Onboarding Checklist

Initial setup guidance to ensure users experience core value within minutes of signup

Day 7

First Campaign Launch

Prompting action after basic familiarity is established

Day 14

Advanced Features Introduction

Expanding product usage with automation capabilities

Day 20

Results Showcase

Highlighting measurable impacts and achieved outcomes

Day 25-30

Conversion Incentives

Creating urgency with special offers and continuity benefits

Day 1: Onboarding Pop-up – 'Let's Get Started with Marketing'

Strategic Purpose

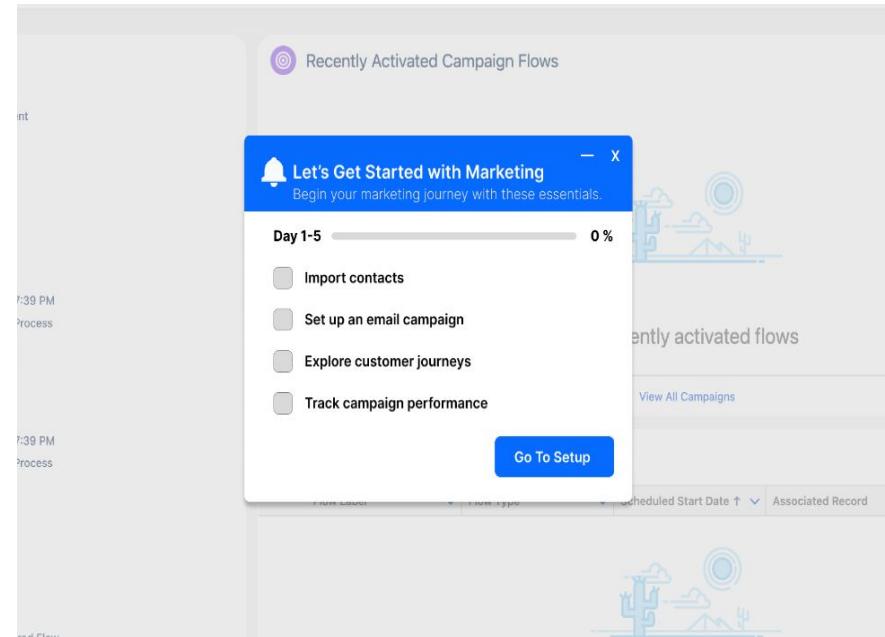
This initial pop-up ensures fast activation by guiding new users through essential setup tasks and establishing clear, achievable milestones within the first 24 hours of the trial.

Content Structure

- Interactive checklist format with progress tracking
- Essential tasks prioritized for immediate value
- Clear, actionable steps with single-click access
- Estimated completion time (10-15 minutes)

Psychology Behind Day 1 Pop-up

- Instant gratification - Checklist format provides immediate satisfaction as items are completed
- Goal clarity - Reduces decision paralysis by providing clear first steps
- Zeigarnik effect - Users feel compelled to complete unfinished tasks



Users who complete this checklist are 3x more likely to convert to paid

Conversion Rate Impact: +30%

Day 7: Engagement Pop-up – 'Launch Your First Campaign'

Purpose

Drive value realization and habit-building after the initial setup period. This strategically timed pop-up appears when users have had enough time to become familiar with the platform but may need a nudge toward meaningful action.

Psychological Triggers

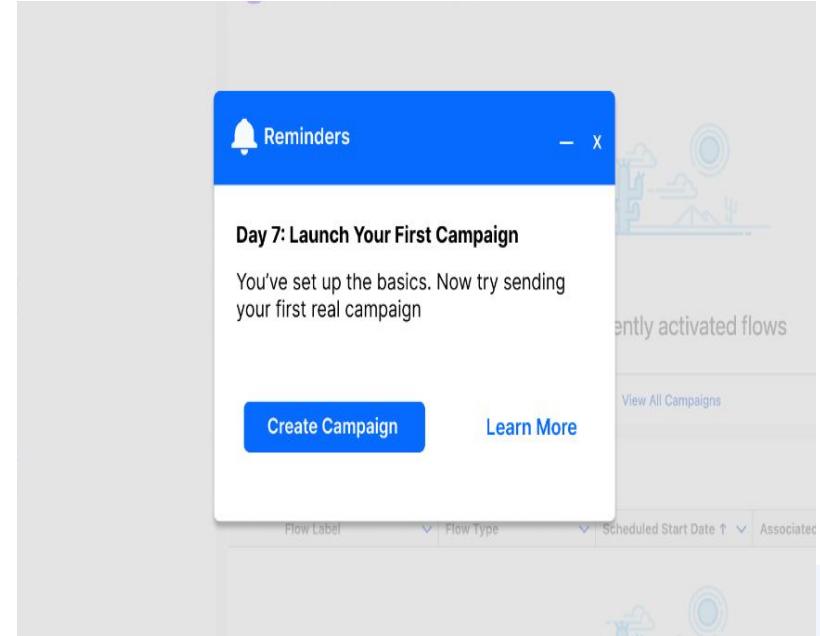
Overcoming User Inertia

- Addresses the friction of moving from setup to actual usage
- Creates gentle pressure through progress indication (60% complete)
- Simplifies next actions to reduce cognitive load

Strategic Timing



Why Day 7? Research shows 90% of users who take meaningful action by day 7 are 3X more likely to convert to paid plans at trial end.



Day 14: Advance Feature Introduction

Strategic Purpose

Showcase advanced features and increase perceived value when users are most receptive to exploring product depth.

Psychology Behind Timing

Curiosity Gap

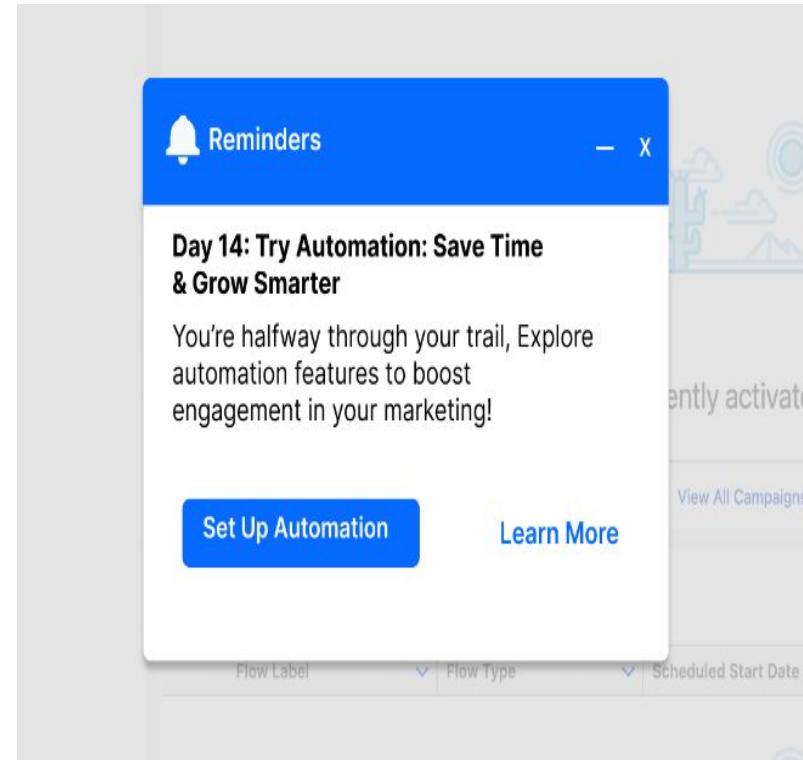
Introduce advanced capabilities when basic mastery creates confidence to explore.

FOMO Activation

Highlight what users might miss without upgrading to the full version.

Conversion Impact

Users who engage with advanced feature pop-ups are 2.7x more likely to convert to paid accounts, as they perceive higher product value and future potential.



At the midpoint of the trial, users have built basic familiarity but need new value discovery to maintain momentum and justify future investment.

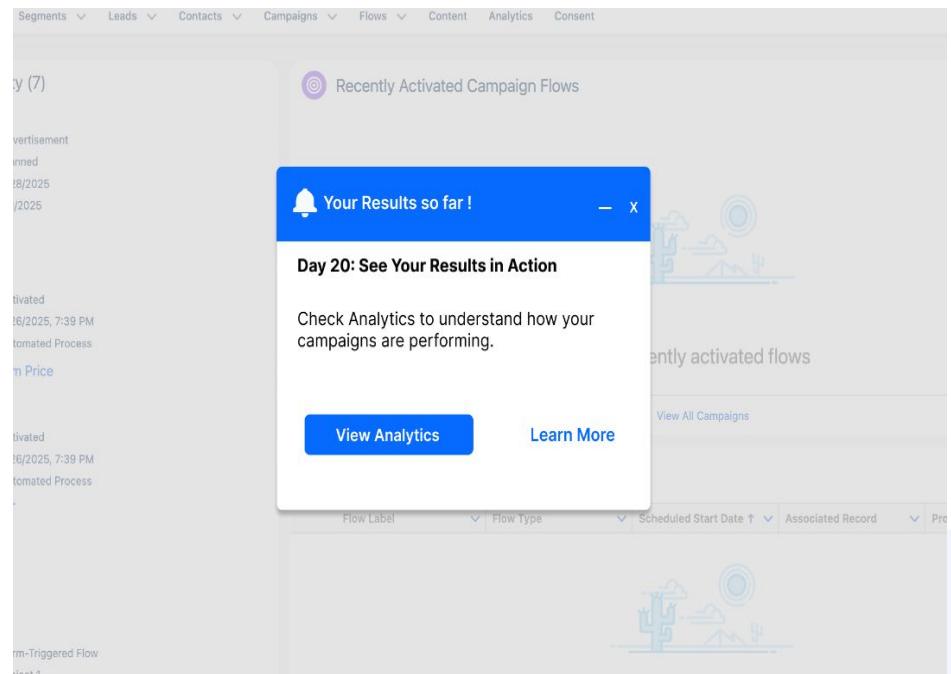
Day 20: Value Demonstration Pop-up – 'See Your Results in Action'

Psychological Triggers

- Sunk Cost Effect — Emphasizes time already invested
- Loss Aversion — Creates fear of losing gained improvements
- Data-Driven Validation — Concrete metrics build trust and confidence

Optimal Timing

Day 20 is the ideal window to show results — after initial setup period but before final decision pressure. Perfect moment to reinforce value before urgency messaging begins.



Pop-up timing: Studies show day 15-22 value demonstration yields 27% higher upgrade rates

Final Days: Urgency Pop-up – Trial Ending Soon'

Purpose

- Create urgency and reduce abandonment by reminding users their trial is ending soon, while offering a clear path to continue their progress.

Conversion Psychology

- Countdown timer creates a tangible sense of limited time, driving action to avoid losing access.

Loss Aversion

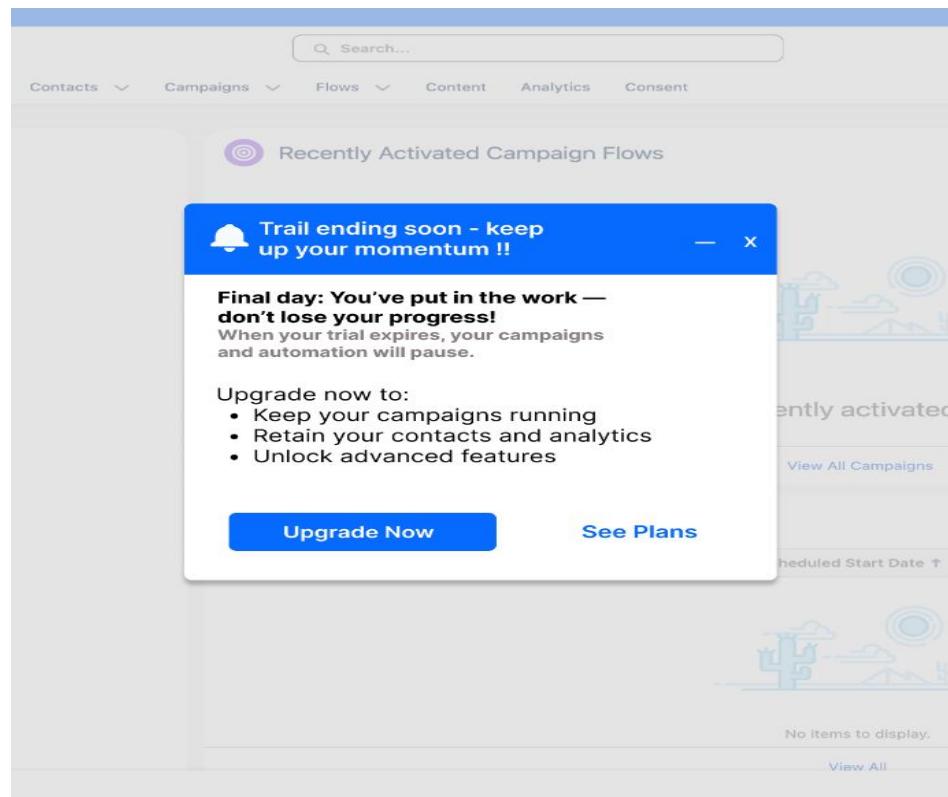
- Emphasizing "keep your momentum" triggers fear of losing progress already made during the trial period.

Reward Anticipation

- Special offer creates an incentive that makes the decision to upgrade feel more valuable and timely.

Impact

- Final-day pop-ups with urgency messaging can



REFERENCES AND CLOSING



REFERENCES

Diverse Knowledge Sources

The strategy is built upon a foundation of studies, industry data, and established psychological principles.

User Engagement Insights

The design incorporates best practices for the entire user journey, ensuring each touchpoint from onboarding to conversion is purposeful and impactful.

Methodology Alignment

By adhering to proven conversion methodologies, the approach is structured to deliver reliable and measurable outcomes.



**THANK YOU
AND
QUESTIONS**

Sources

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