



# Optimizing Retention and Usage of a B2B SaaS Toolkit

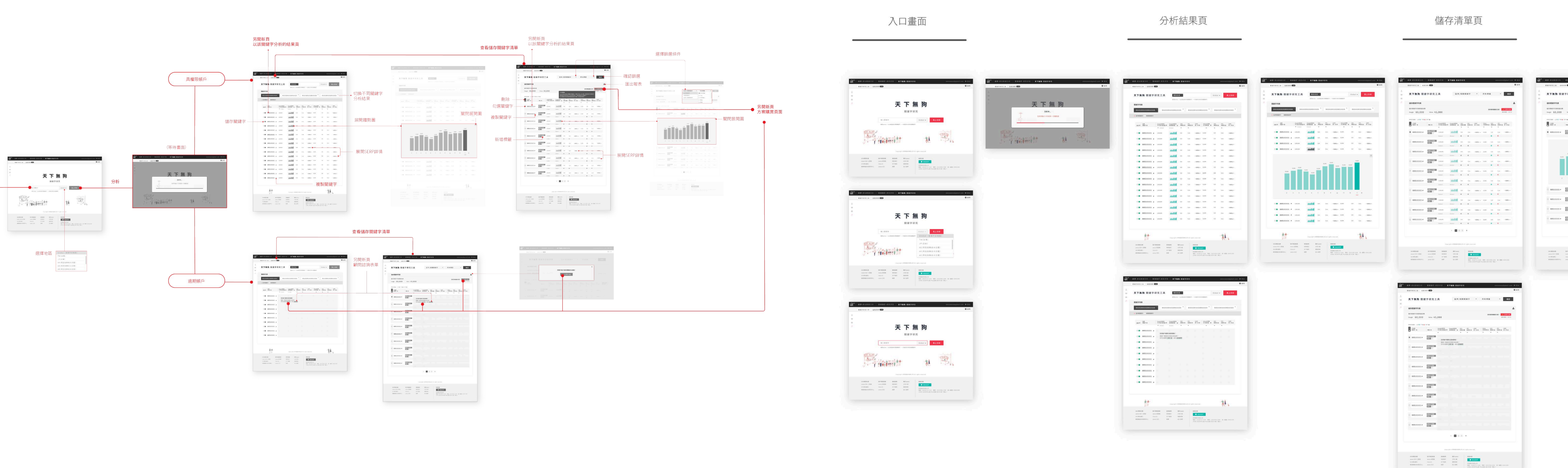
#UIUX Design #User Research #Strategy Proposal

# Goal

Increase weekly active users, usage frequency, and retention rate.

# Assumption & Design Implementation

We assume that adding features like keyword search trends and related keywords will enhance performance.



# Design Outcome

- **Weekly Active Users:** +24.6% (Paid), +19.8% (Free Trial)
- **Weekly Usage:** +24.1% (Paid), +70.4% (Free Trial)
- **Retention Rate:** No significant change

Despite the growth in user numbers and activity, retention remained flat. This indicates that while the new feature increased engagement, it may not have been compelling enough to drive long-term usage. **Further strategies are needed to improve retention.**





# Next Step 1 : Exploration of Overall User Characteristics with Data

## Key Results

Many users **unsubscribe within months** (tool effectiveness requires longer).

→ Users churn before experiencing the benefits of the tool, as it takes a longer time to deliver results, leading to retention challenges.

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Usage frequency **does not correlate with user lifecycle**; shorter lifecycle users often use the tool more.

→ Simply increasing **usage frequency may not help with retention.**

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Most users **have utilized the tool's primary functions**, challenging the assumption that low retention is due to lack of use of these features.

→ Users may stop using the tool even after trying its main functionalities, **possibly due to misunderstanding of use or the feature not meeting user needs.**

# Next Step 2: Understanding Usage Context via Survey & Interview

(Subjects: Paid users with at least 1 month of usage)

## Key Results

SEO Toolkit Customer Lifecycle			
	Trial Phase	Initial Setup	Long-term Maintenance
Purpose		Website structure adjustments	Periodic checks to ensure website competitiveness
Usage		Intensive	Less Intensive
User Type	Initial Setup Users Websites not yet implementing SEO		Maintenance Users Websites with established SEO undergoing regular maintenance
			<div>Dynamic Content Users Websites with Frequent Content Change e.g. E-commerce platforms, content websites</div> <div>Static Content Users Websites with Stable Content, Focused on Specific Keywords e.g. Online stores with minimal content changes, brand websites</div>
Needs		<div>HighWebsite SEO Audit</div> <div>HighKeyword Research</div> <div>LowRank Tracking</div>	<div>LowWebsite SEO Audit</div> <div>HighKeyword Research</div> <div>LowRank Tracking</div> <div>LowWebsite SEO Audit</div> <div>LowKeyword Research</div> <div>HighRank Tracking</div>

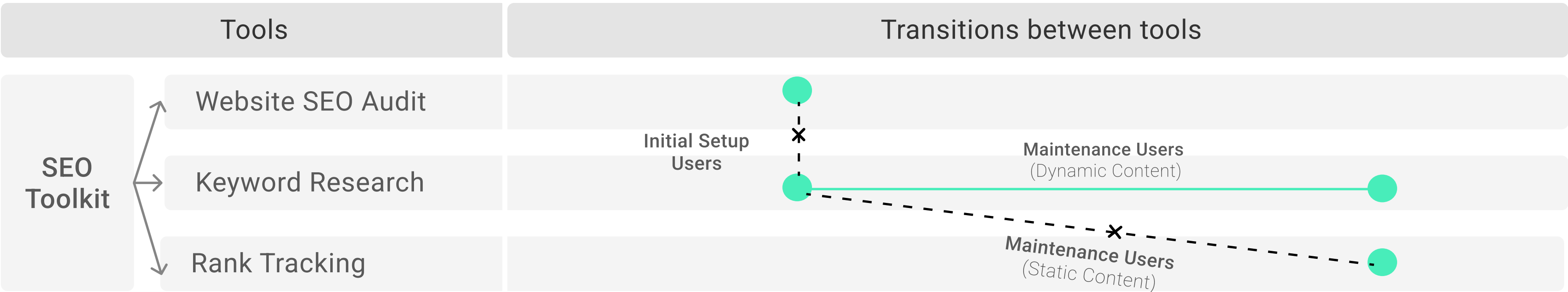
# Proposing corresponding solutions

## 1 Design Optimization

### Design Problem

Separate entry points for each tool

Fragmented UX that does not align with user use cases



### Design Solution

Integrate the tool entry points

Long-term → Toolkit redesign

Short-term → guiding designs that ease transitions between tools

# Proposing corresponding solutions

## 2 Pricing Plans Optimization

### BEFORE

#### 14-day Free Trial with Full Features

- Ineffective because SEO results take longer to show
- Lead to abuse with repeated registrations for free access

#### Tiered plans based on organizational size and export/storage limits

- User needs vary by content type and usage stage, not by organization size.
- Export and storage are the least needed features

企業

6,980元

5,980元/月

※每月自動扣款

購買

中大企業與廣告公司

200個儲存關鍵字  
每月50次分析報告匯出  
每月50次競爭對手比較匯出  
100個儲存網址  
50個排名追蹤組合

新創

3,980元

2,680元/月

※每月自動扣款

購買

新創與高成長企業

80個儲存關鍵字  
每月20次分析報告匯出  
每月20次競爭對手比較匯出  
40個儲存網址  
50個排名追蹤組合

個人

1,980元

1,380元/月

※每月自動扣款

購買

個人專家與工作室

30個儲存關鍵字  
15個儲存網址  
50個排名追蹤組合

### AFTER

#### Freemium with limited features

#### Tiered plans based on use cases

	免費用戶	付費用戶（入門）	付費用戶（進階）
適用對象	想體驗產品功能的用戶	網站剛建置，沒有做過SEO的網站用戶	長期維護網站SEO的用戶
此對象的使用需求	-了解產品功能 -最注重排名和關鍵字搜尋量	-需要密集使用網頁檢測工具/關鍵字研究工具。 -剛入手，需要嘗試產品是否符合需求。 -最注重排名和關鍵字搜尋量	-不需要密集使用，只需要定期確認排名等狀況。尤其網頁檢測不會常用。 -部分用戶（內容網站）對關鍵字研究工具用量較大 -部分用戶（產品品牌官網）在初期建置後就不太需要用關鍵字研究工具，多關注關鍵字頁面排名。 -最注重排名和關鍵字搜尋量
首要目標	讓用戶體驗產品功能，購買方案	持續購買	持續購買
次要目標	減少重複註冊情形 獲得用戶資料，增加註冊用戶數	轉換為年付方案 升級到較高價方案 減少/避免使用免費帳戶情形	轉換為年付用戶 減少/避免使用免費帳戶情形

	免費方案	入門方案	標準方案
適用對象	需要體驗產品功能的用戶	網站剛架設或更新、初步經營SEO的入手推薦	適合專注維護網站SEO、長期保持網站競爭力的能手
價格	永久免費	月付： <div></div> 年付： <div></div>	月付： <div></div> 年付： <div></div>
網站整體表現觀測	○	○	○
關鍵字研究	△ 功能有限（搜尋量×）	○	○
網頁評測（無排名）	△ 功能有限（不顯示修改項目）	○	○
關鍵字頁面排名	×	×	○
儲存額度	×	○ 參考目前個人方案額度（關鍵字/網址）	○ 參考目前新創方案額度（關鍵字/網址/排名追蹤組合）
匯出報表	×	○ 無次數限制	○ 無次數限制