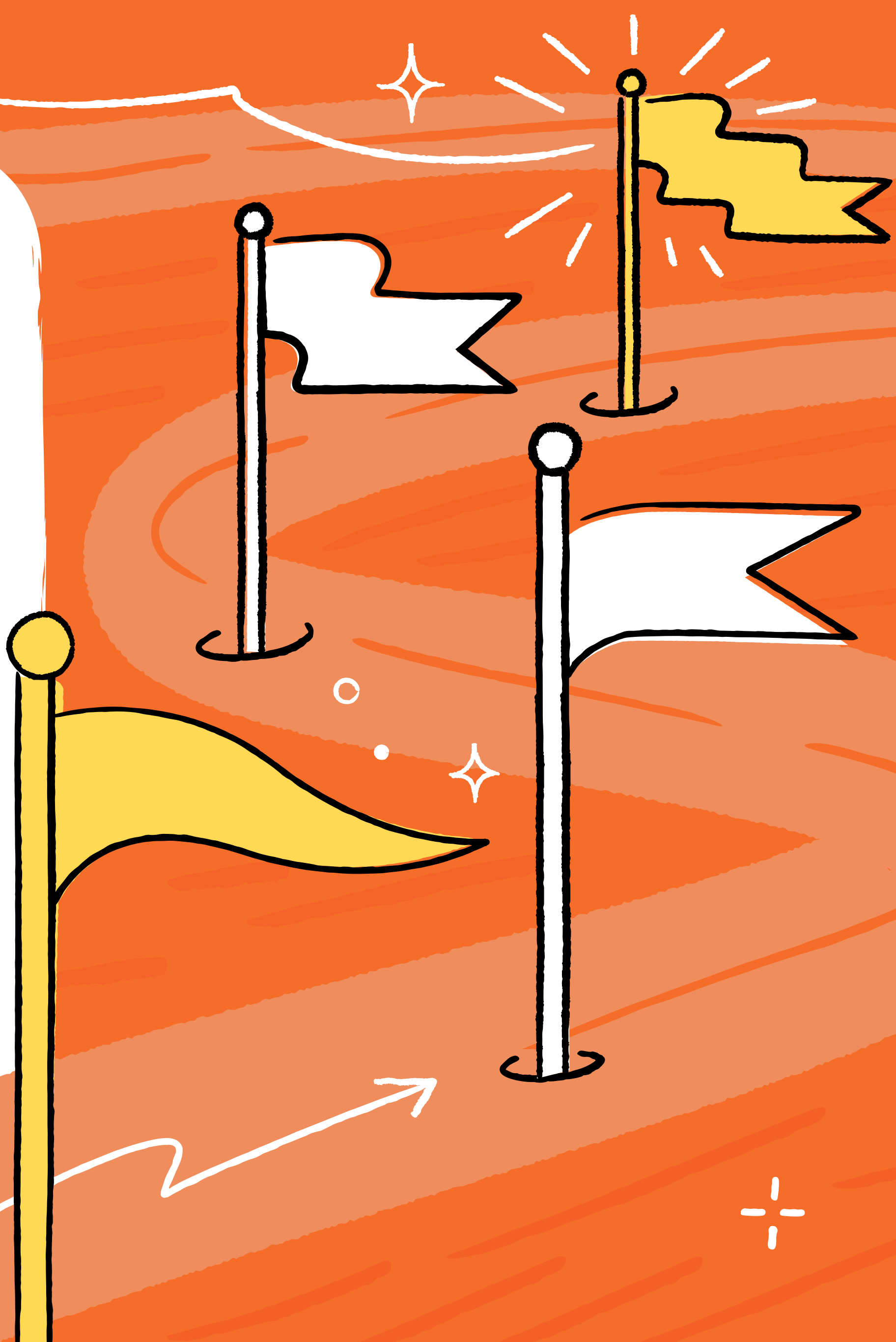# INTERCOM

How to Build an Expert *Onboarding* Strategy

Drive adoption with the C.A.R.E. framework

User onboarding isn't just an introduction to your product. It's a continual process that guides customers towards success throughout their entire product journey.

Today, SaaS companies have two funnels: the first attracts new users, the second is dedicated to keeping them. That means that a stellar onboarding experience is critical – from the moment your customers sign up with your product to the moment they become its loudest ambassador. It's simple: good onboarding = higher customer retention.

You'll never finish developing your onboarding experience. Even your most long-standing customers will constantly encounter new product benefits and features. Keeping those customers engaged means consistently offering them timely, contextual opportunities to meet their goals through well-crafted product tours, personalized flows, and curated messages for every stage.
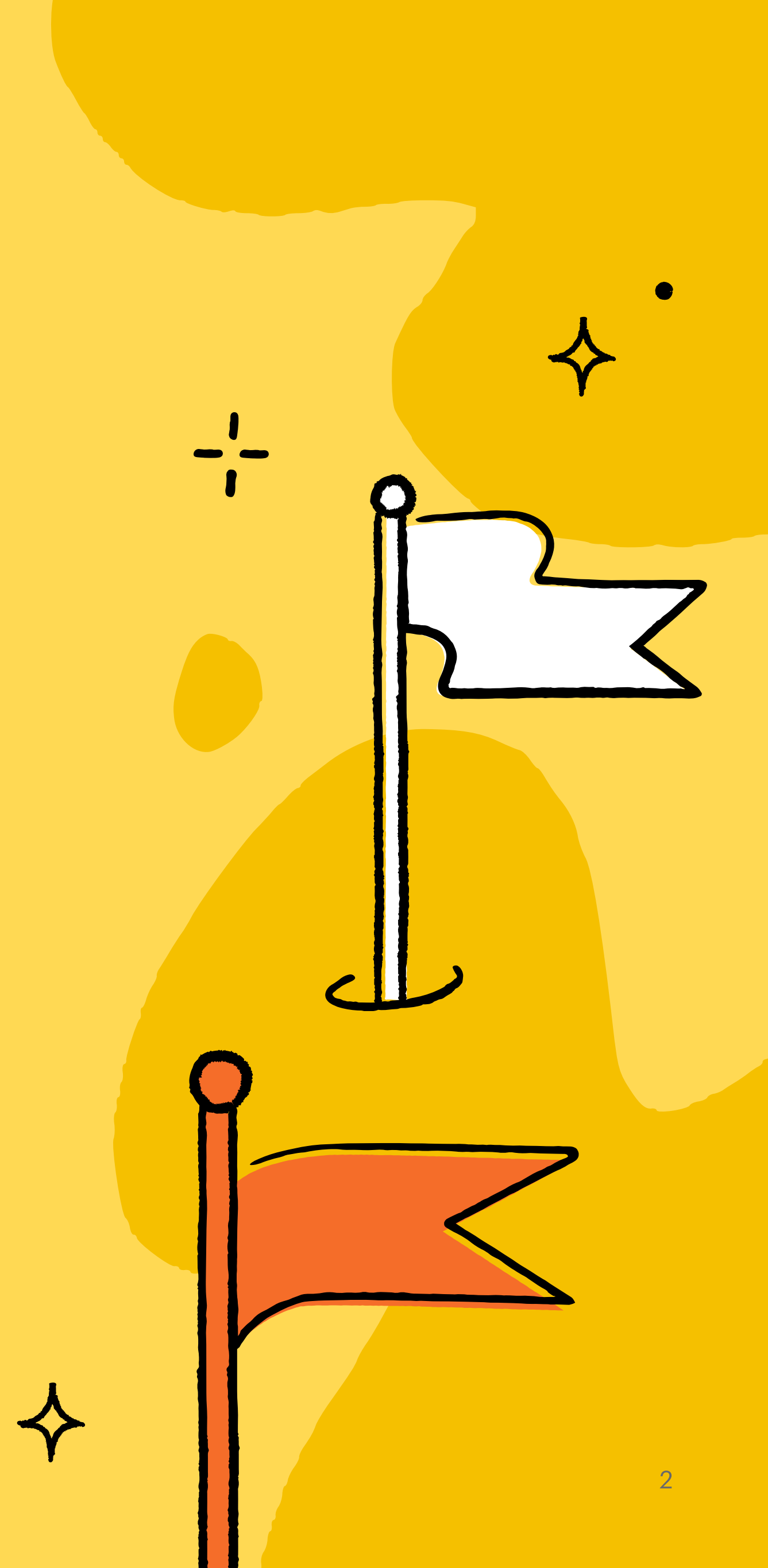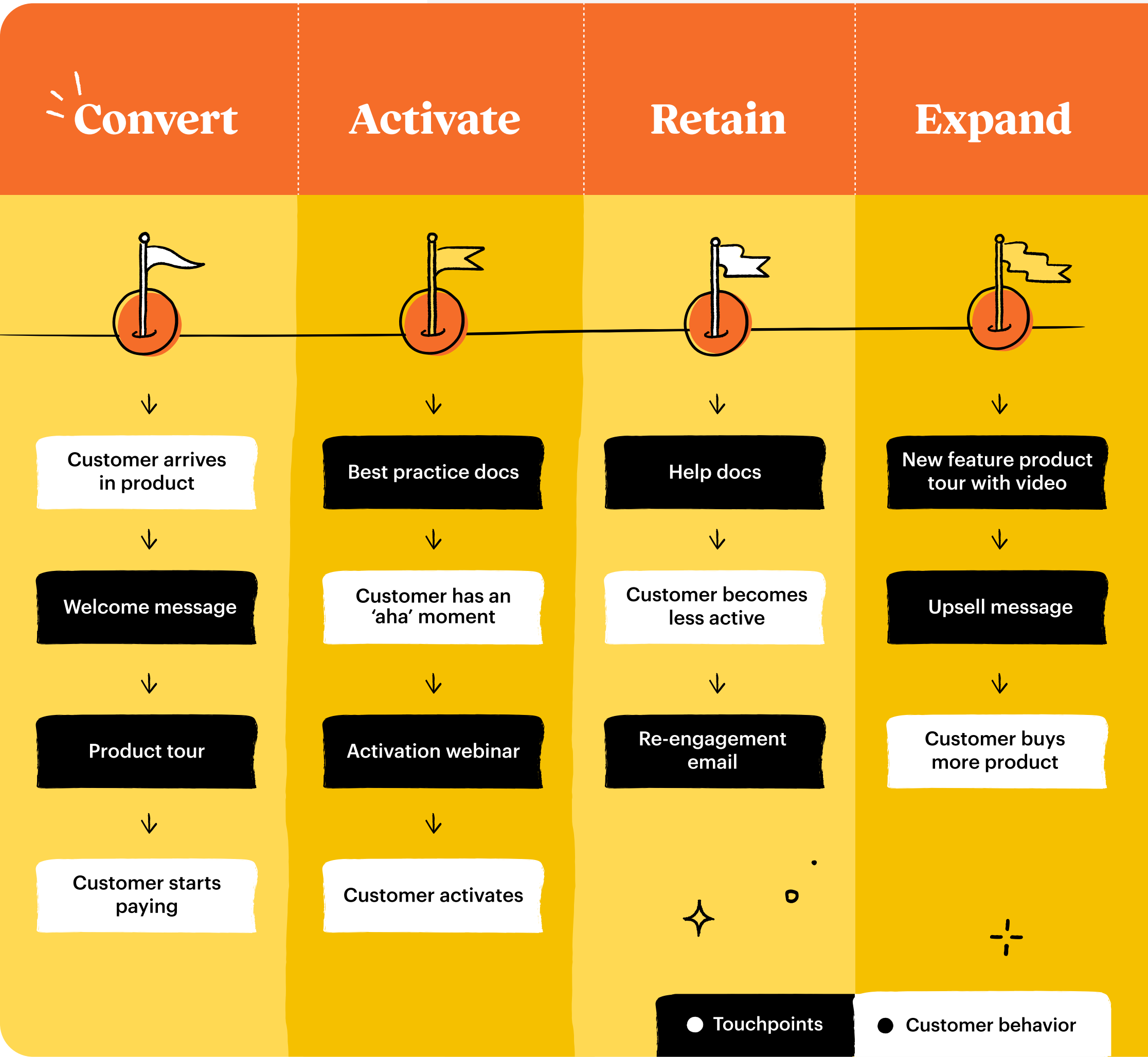
What does an onboarding strategy look like?

Successful, multi-stage onboarding means providing users with the information they need at the right time based on their product usage (or lack thereof). When you consider the vast numbers of channels, carefully timed messages, user flows, educational content, and contextual communications required to achieve that, it can be a daunting prospect.
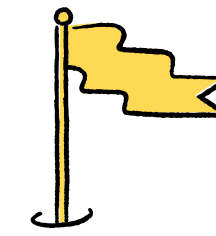
But it doesn't have to be. Tools like Intercom Product Tours, interactive tours that guide your customers through your product and help them to get value from Day One, can help you create seamless flows and provide users with the information they need at every step. And when it comes to the types of messages you should send, and the content in those messages, we've developed the C.A.R.E framework to meet your customers' needs at every stage of onboarding.

In this guide, we'll explore how you can create a comprehensive onboarding strategy that can handle any user's journey within your product.

Convert	Activate	Retain	Expand
Customer arrives in product	Best practice docs	Help docs	New feature product tour with video
Welcome message	Customer has an 'aha' moment	Customer becomes less active	Upsell message
Product tour	Activation webinar	Re-engagement email	Customer buys more product
Customer starts paying	Customer activates		

● Touchpoints   ● Customer behavior

C: Convert

This is your chance to make an incredible first impression, and convert free trial users into paying customers.

1. Welcome email

Don't waste time telling users they've signed up – they already know! Instead, send a warm welcome message.

When creating a welcome email:

- Greet customers by name, and let them know you're excited they've signed up.

- Personalize your product by introducing yourself.

- Make it clear you're there to help them.

- Lay out the next most impactful step they can take to get started, whether it's creating a new project or adding five teammates.

- Answer the three most common questions customers ask – right there in the email.

2. First-use product tour

Engage users from their first visit by showing them what they'll need to get started.

When creating a product tour:

- Welcome users: keep it personal by adding a video or image of one of your teammates.

- Be upfront: tell your users what this product tour will do for them before they begin.

- Highlight the most important features to help them achieve the outcome you specified at the start.

- End with clear next steps.

ExampleApp

PROJECT TASKS

Ally from Examply

Next: Real-time reporting 📊
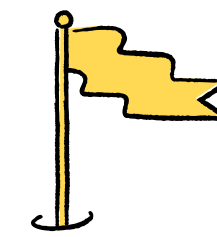Track and measure what's important to your business.

3 of 4   Next

PROGRESS

A: Activate

Introductions are out of the way, now it's time to activate your users. Increase their engagement with your product so they're more likely to stick around.

Goal: Help users reach their "aha" moment – that instant where the value of your product becomes clear to them.

1. Habit-forming email

As your users start to form habits within your product, they'll begin to integrate it into their daily lives.

Consider the most important habits you'd like your users to adopt. For example, if your product is available across several platforms, send an email encouraging customers to download your mobile app. Make it clear why they should take this action – what benefits will they get from it?

harvestr

"We've increased our activation rate by 10%."

Valentin Huang
Co-founder and CEO

2. Best proactive in-app message

After the first couple of times your users visit your product, you'll want to help them extend their use case and get maximum value. Best practice messages are perfect for engaging your users in the right place, at exactly the right time.

For example, if users have created a few different projects, it might be a good idea to show them how to organize and share their documents and files for collaboration. Focus on their overall goals – it's not creating a project, it's working efficiently with a group.

Help them take the necessary steps towards achieving those goals.

When creating best practice messages:

- Trigger the message to send after your customers have used a feature a few times. For example, set a rule like "Created project count is 3."

- For simple best practices, include the points in the message. Make them digestible by creating bullet points or numbered steps. For more complex best practices, create a blog, document, or webinar and link to it from your message.

- Always focus on the benefits to your customer.

- Celebrate your customers' milestones to give them the confidence they need to keep progressing.

R: Retain

It takes work to keep your activated users excited and engaged. Encourage regular product usage by showing customers how to get more and more value from your product.
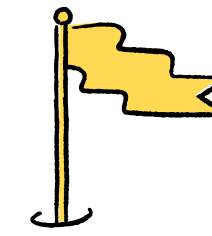
Goal: Showcase more value to your customers.

1. Key feature in-app message

There's a point after a customer has signed up, but before they've used that all-important feature that will keep them coming back. This is where the risk of churn is highest. It's up to you to encourage them to use that one feature – and how better than a well-timed message in your app?

Hi Carol! 👋

Have you checked out our reporting feature yet? 📊 You'll get to see a detailed breakdown of your campaign's performance in real time.

Check out reports

When creating key feature in-app messages:

- Trigger them to send to all new users who haven't taken the relevant action within two days of signing up.

- Make it easy for users to take the next step by including a link or button.

- Focus on the benefits of taking the action.

- Use lively, enthusiastic language.

2. Gentle re-engagement email

Sometimes keeping customers engaged means recognizing the crucial moment when they stop getting value from your product and begin to slip away. That's your opportunity to step in.

When creating a re-engagement email:

- Act fast. Thank them for being a customer and offer them a reason to return to the product, like some new features.

- If they still don't want to return, turn it into a learning opportunity and ask them why. Use their feedback to prevent it from happening again.

- Respond promptly, answering any questions or concerns the customer raises.

ε: **Expand**

Help customers make your product part of their daily routines. Encourage them to form habits, explore new features, and increase their usage.
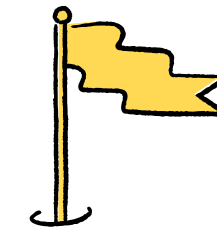
Goal: Show customers all the ways to get value from your product by increasing their usage.

1. New feature tour

Regular users will be familiar with your product's features, but when you add something that could help them do their jobs better, don't hesitate to let them know. Create a targeted tour that points out the new feature, explains its value, and tells customers how to get started.

When creating a new feature tour:

- Keep it short and to the point.

- Keep the content brief and focused on the benefits of using the feature.

- Use a GIF, image, or video to explain the feature and make the tour more engaging.
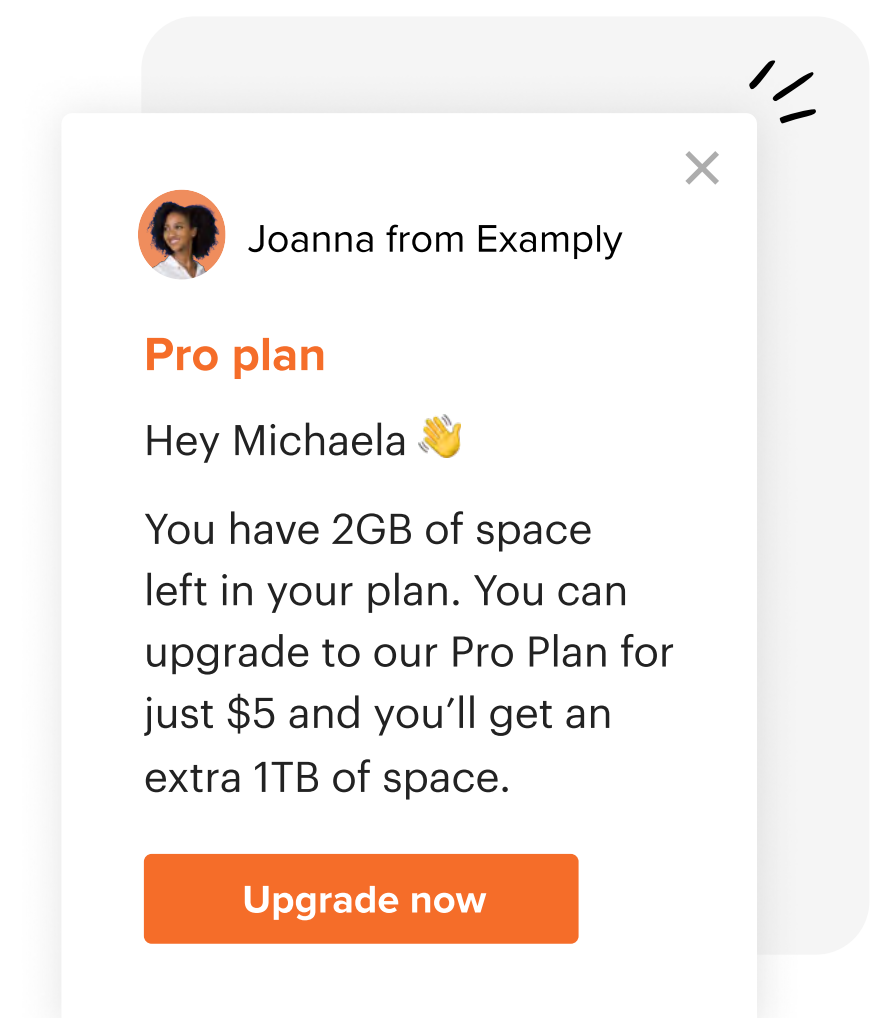
2. Upsell message

If a customer reaches their usage limits for your product, automatically trigger an upsell message that offers a solution and explains the increased value they can access by upgrading. An in-app upsell message at the right time, in the right place, will always have a contextual advantage over an upsell email.

Trigger an upsell message when:

- Your customers have reached a usage limit.
- There is a more appropriate price plan available.
- A customer is using a particular feature a lot.
- A customer is seeing significant results.

Intercom customer Put.io experimented with in-app upsell messages to boost growth. One particularly effective example was a message to customers who had been using their lowest-tier plan for more than six months.

The message offered a five-dollar discount on the price of a higher-tiered plan, and prompted 20% of recipients to upgrade straight away.

Joanna from Examply

Pro plan

Hey Michaela 👋

You have 2GB of space left in your plan. You can upgrade to our Pro Plan for just $5 and you'll get an extra 1TB of space.

Upgrade now

Ready to get started?

Ultimately, your users' experience of your product throughout their lifecycle rests on good onboarding. Onboarding is a passion for us here at Intercom – and our Product Tours make the process seamless. From guiding customers through their first steps, to driving long-term adoption, Intercom is here to support you every step of the way.

Are you interested in creating an interactive onboarding experience for your customers?

See how Intercom can help.

SPENDESK

" We use Intercom for our onboarding flows, to share announcements about new features, and to re-engage customers. Having everything centralized is really helpful."

Vincent Terol
Head of Customer Success

Victoria Vergnaud
Customer Success Operations

HIKE

" New users who took the tour activated at 4x our current rate."

Andy Allen
Co-founder and Director