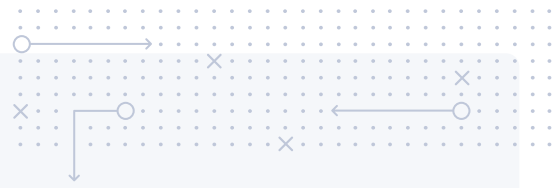


THE

Product Experience Playbook

A how-to guide for designing more effective user onboarding, improving feature adoption, running in-app marketing campaigns, collecting user feedback, and creating more delightful user experiences—all without writing code.

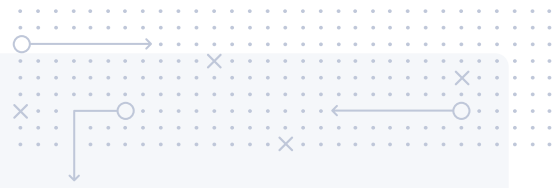




THE PRODUCT EXPERIENCE PLAYBOOK

Table of contents

- ▶ **01 Introduction**
- ▶ **04 User onboarding**
 - 05 Welcome messages
 - 06 Product tours and walkthroughs
 - 07 Onboarding checklists
 - 08 Choose your own adventure
 - 09 Invite prompts
- ▶ **10 Feature awareness and adoption**
 - 11 Feature launches
 - 12 Feature nudges
 - 13 Feature tours and walkthroughs
- ▶ **14 In-app announcements**
 - 15 Webinar and event announcements
 - 16 Product updates
 - 17 Announcement center
- ▶ **18 Upselling and expansion**
 - 19 Subscription upgrade prompts
 - 20 Referral campaigns
 - 21 Social proof campaigns
- ▶ **22 Customer surveys and feedback**
 - 23 Net Promoter Score
 - 24 User surveys
 - 25 Feedback forms
- ▶ **26 Self-service support**
 - 27 In-app FAQ guides
 - 28 Help center
- ▶ **29 User delight**
 - 30 Gamification
 - 31 Celebrate milestones
- ▶ **33 Appendix A.
The Product-led Growth Flywheel**
- ▶ **42 Appendix B.
Further resources**



Appcues makes it easy to deliver exceptional user experiences at scale and unify your organization around the product as its greatest lever for growth.

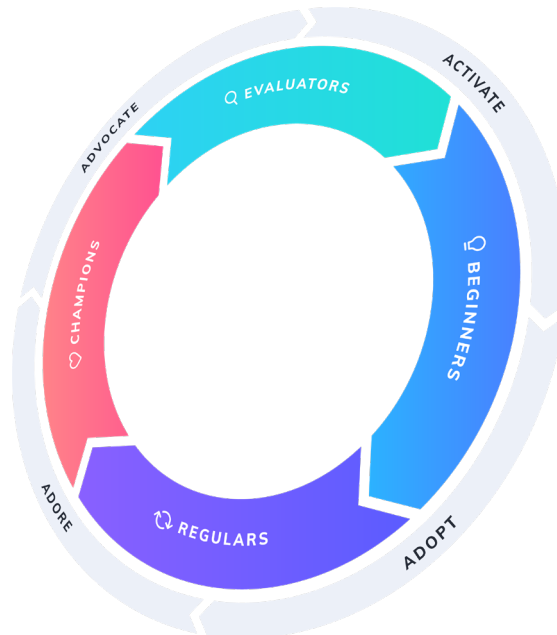
In this playbook, we'll walk you through over 20 proven strategies and tactics for creating delightful in-product experiences at every stage of the user journey. You'll learn how to:

- Onboard and engage new users
- Drive adoption of new and advanced features
- Collect contextual feedback and user-declared data
- Deliver targeted in-product campaigns
- Provide scalable, self-service support
- Delight your users at every turn

A NOTE ABOUT:

The Product-Led Growth Flywheel

In the pages that follow, we'll be talking about the user journey as it's visualized in our Product-Led Growth Flywheel.



The flywheel revolves around 4 sequential user segments that correlate with stages in the user journey from awareness to evangelism—evaluator, beginner, regular, and champion—and the key actions that users need to take to graduate to the next stage—activate, adore, adopt, and advocate.

The idea is to focus company- and team-level strategies on optimizing the user experience to move users from one stage to the next. As the rate of users completing each action increases, your flywheel will spin faster, increasing the rate at which users move from one segment to the next. This creates a positive feedback loop: As more users become advocates, they drive more acquisition and growth increases exponentially.

While you don't have to adopt our framework, a good understanding of the 4 user segments and the associated stages of the user journey will help you leverage the strategies contained in this playbook more effectively.

You can read more about the Product-Led Growth Flywheel in Appendix A on pages 33 to 42.

A NOTE ABOUT:

Targeting and segmentation

You can make product experiences **more relevant** through targeting and segmentation. You can deliver more personalized onboarding, for example, by segmenting users based on use case or acquisition source.

Say you are running a marketing campaign around a specific feature. You can use targeting and segmentation to show users who sign up through this campaign a unique onboarding flow that showcases that feature more heavily.

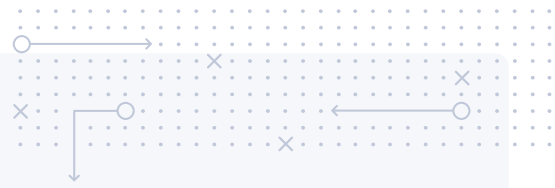
If you're an Appcues customer

For the example above, use UTM parameters for your campaign's landing page. If users are going to be redirected to another page (for example, a registration page), make sure you are adding UTM parameters to that page as well.

Create a segment in Appcues using 'last page seen' 'contains' the 'utm parameter.'

Use this segment as the targeting of your campaign flow to take users directly to the feature or functionality they signed up for.

Ideally, every flow you publish should have thoughtful targeting and segmentation applied. As you read through the use cases in this playbook, be sure to think about which user segments and targeting parameters you'd need to apply to deliver each experience to the correct users.



CHAPTER

01

User onboarding

User onboarding is the process of guiding new users (evaluators) to find value with your software product or service.

The user onboarding experience spans from the moment someone starts to sign up for your product, to their first aha moment—the moment they realize how your product is going to improve their life in one way or another—and beyond. Because it is the first impression new users have of your product, user onboarding can be a truly make-or-break experience for your users.

A good user onboarding experience doesn't just teach new users how to use software. It teaches them how to use it successfully, in order to meet their unique goals.

At the end of a user onboarding experience, users should:

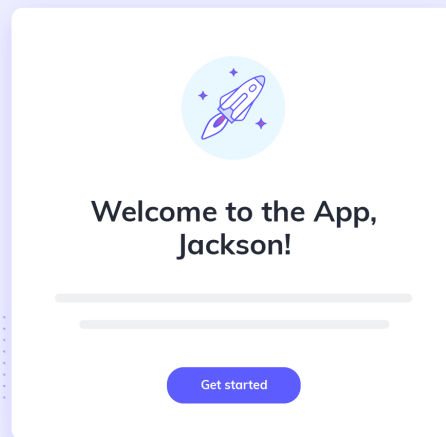
1. Have an understanding of your product's value (ideally gained through first-hand experience or use).
2. Be equipped with the information needed to use your core product successfully on their own (or know where to find this information quickly and easily).

Remember: Your goal during onboarding is to highlight those features that will guide evaluators to their aha moment quickly and efficiently.

That's because evaluators need a map to initial success, not an advanced user manual. These users are searching for value but don't want to work hard to find it. It's your job—and the job of your user onboarding experience—to make sure they don't have to.

1. WELCOME MESSAGES

Delight users with a personalized welcome message



► Recommended UI pattern: Modals

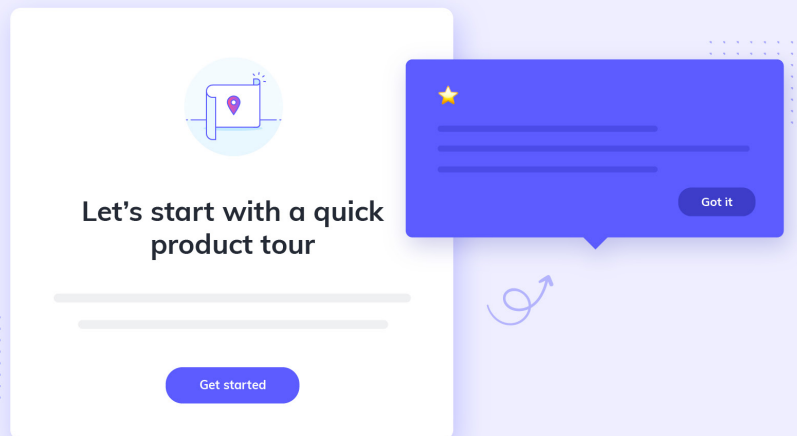
Use a welcome modal to greet new users with a friendly, personalized message. Take this opportunity to reiterate the value your product delivers, remind users about why they've signed up, and set expectations about the experience to follow.

If you're an Appcues customer

Use the `user_name` property for simple yet effective personalization.

2. PRODUCT TOURS AND WALKTHROUGHS

Help users find their bearings with a streamlined product tour or walkthrough



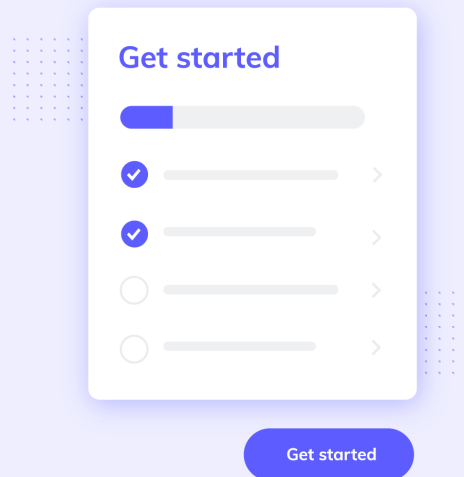
► **Recommended UI pattern:** Tooltips | Welcome modal + tooltips + hotspots

Show your users around by calling out the most critical features with a quick, action-driven tooltip tour that leads users to value.

Avoid giving technical descriptions of your features and instead, focus your messaging on explaining how each feature contributes value and can help them reach their goals. Additionally, don't drag users through an exhaustive tour of every single feature—assume they are starting with zero knowledge but firm goals in mind.

3. ONBOARDING CHECKLISTS

Set a clear path to value with an onboarding checklist



- ▶ **Recommended UI pattern:** [Appcues Checklist](#) | Custom-coded slideout

Checklists are an excellent tool for building user motivation and improving onboarding completion rates.

To create an effective checklist, start by defining your activation criteria. Ask yourself: What are the 3 to 5 actions that a user must take to get their desired outcome and realize value?

Once you have your list finalized, create flows to guide users to each prescribed action.

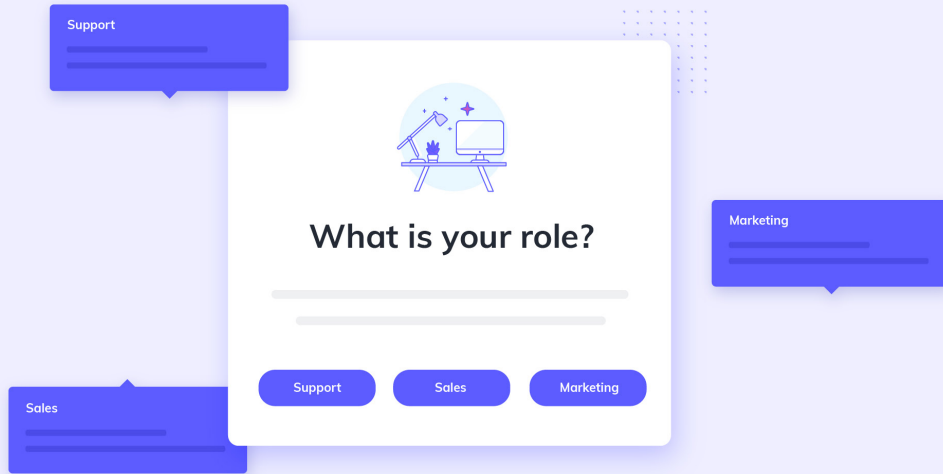
If you're an Appcues customer

Appcues Checklists are persistent on the page—they are interactive but they don't interfere with your user's goals in your product. Once you've defined your activation criteria, go to Checklists in your Appcues dashboard to create your first checklist.

Learn more about how to create checklists in Appcues in [this doc](#).

4. CHOOSE YOUR OWN ADVENTURE

Let users choose their own path



- ▶ **Recommended UI pattern:** Modal with multiple CTAs + product tours

Allow users to segment themselves by asking them about their goals and providing multiple pathways into your product.

Use your welcome modal to ask users about what primary goal they are trying to achieve with your product. Then use this information to segment users accordingly and provide each segment with a tailored onboarding experience that is focused around reaching their specific objective.

If you're an Appcues customer

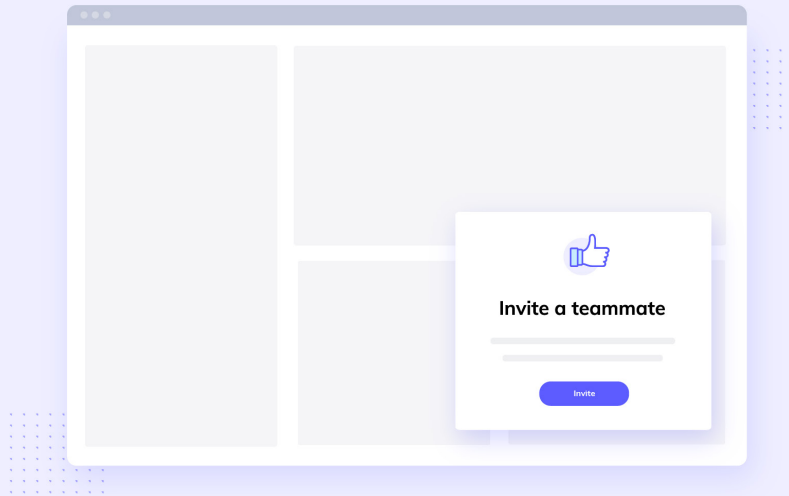
You can use branching logic to create choose-your-own-adventure style onboarding flows.

Start by creating a modal window with multiple CTAs (one for each goal or use case). Use tooltips, hotspots, and modals to create several different product tours, corresponding to different user goals.. Set up the CTAs in your welcome modal to trigger the appropriate onboarding flow, and let users choose their own path.

Learn more about how to build a branching onboarding flow [here](#).

5. INVITE PROMPTS

Encourage users to invite other team members



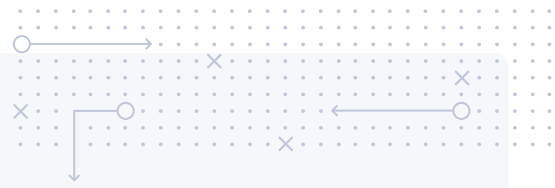
► Recommended UI pattern: Slideout

Having multiple users from a single company reduces the likelihood of churn. Once they have successfully completed onboarding, make it easy for new users to invite other teammates to join them.

Create a slideout that asks your users if they want to invite a teammate to your product and include a field that allows them to enter their teammates' email addresses. You can also ask for relevant information like job title or role to provide a more personalized onboarding experience to invited users.

If you're an Appcues customer

If you use an email automation tool like **Customer.io**, you can have your CTA trigger an automated email to the teammate. Otherwise, you can download a CSV of form responses and manually send an email to the email addresses given.



CHAPTER
02

Feature awareness and adoption

Consistent feature adoption = high retention/low churn = a healthy company with a long, happy future.

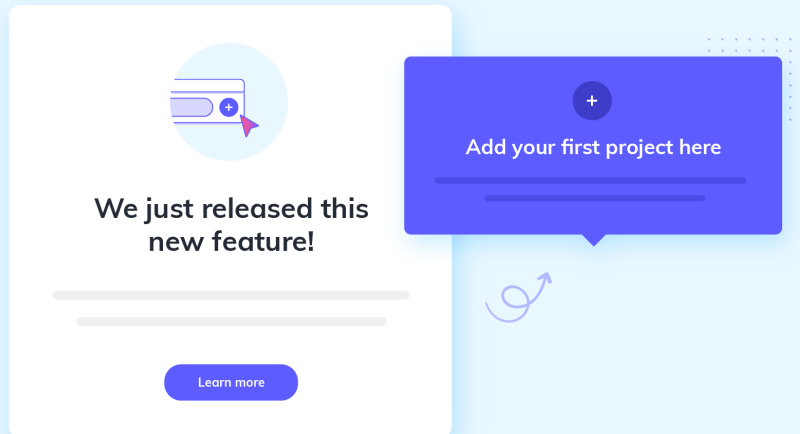
Being able to regularly drive feature adoption is a non-negotiable, must-have ingredient for achieving strong engagement and retention rates. And in-app experiences are among the most effective tools that product owners have at their disposal for creating stickier product experiences.

In fact, research shows that:

In-app messages are 8x more effective at engaging users than push notifications and can boost retention upwards of 300%.

Tooltips are an especially useful pattern for increasing awareness and adoption of key features. Part of what makes tooltips so helpful is that they are contextual and specific—they appear within the product itself and are attached to individual features, allowing you to coach users through the feature discovery process.

Introduce new features



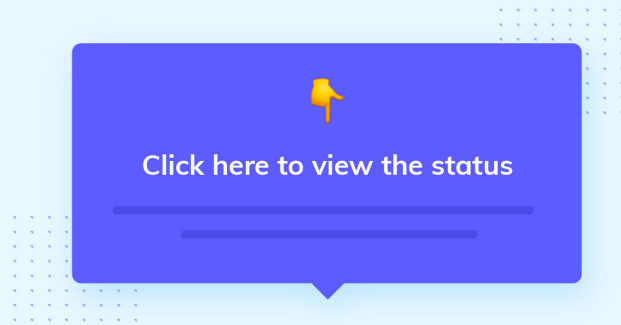
▶ **Recommended UI pattern:** Modal + tooltip | Slideout + tooltip

Your team works hard to roll out new features that enhance the user experience and help your product keep up with customer needs. Make sure your users know about them! Combine your campaign emails and blog posts with an in-app feature announcement and tooltip that points out the new feature's exact location within your product's interface.

If you know the feature in question will be beneficial to all users, make the announcement to returning users upon login. If you have a broad platform with highly distinct use cases, use segmentation to identify the users who stand to gain from the new functionality and target your messaging to them.

7. FEATURE NUDGES

Increase engagement with underutilized parts of your product



► Recommended UI pattern: Tooltip

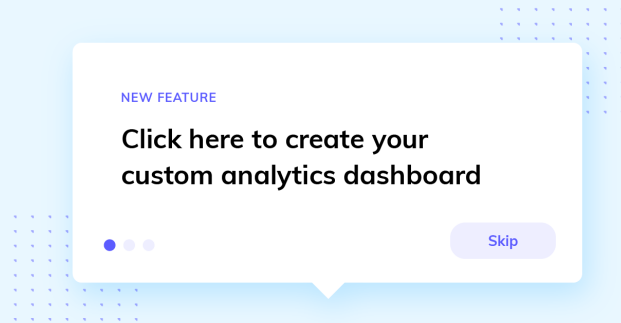
Oftentimes, low feature adoption comes down to a lack of awareness. Solve this by carefully and selectively **nudging users** toward the features that will help them be more successful.

Use your behavioral data to identify the users who aren't interacting with the feature in question. Then, use targeting and segmentation to show those users a simple tooltip that clearly explains the value of the overlooked feature. Bonus points if you add a CTA that triggers a quick feature walkthrough!

If you're an Appcues customer

Learn how to segment users based on their feature usage [here](#).

Walk users through important features with an opt-in tour

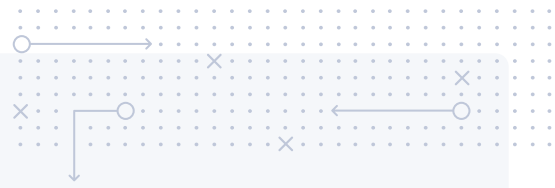


- ▶ **Recommended UI pattern:** [Tooltips](#) | [Modal](#) / [slideout](#) + tooltips

Some features may not be critical during initial onboarding, but are an important part of regular product usage. Offer a quick, opt-in **feature tour** to users as they explore your product more deeply.

If you're an Appcues customer

Using a series of action-driven tooltips, create a flow that walks your users through the actions needed to successfully use that feature.



CHAPTER

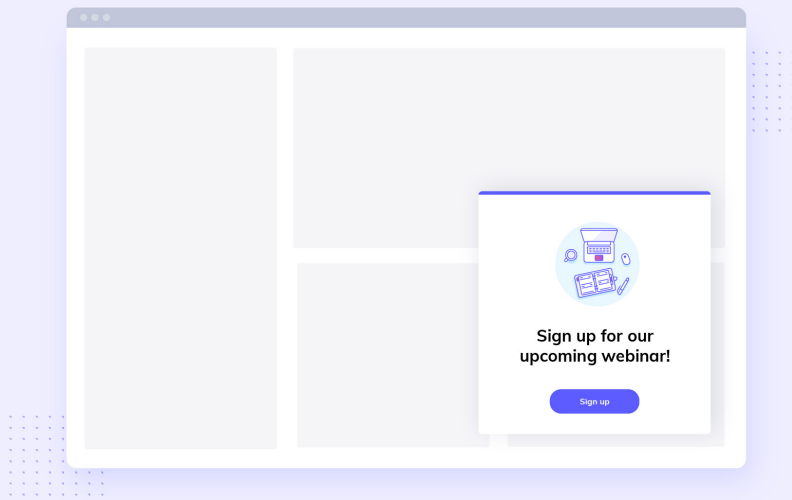
03

In-app announcements

In-app announcements are a great way to reach your customers when they are actively engaged with your product. Customer success and marketing teams can leverage in-app messaging to promote customer events and webinars, while product teams can increase awareness of small but impactful updates.

The important thing to remember about in-app announcements is that they shouldn't interfere with a user's workflow unless absolutely necessary. Use targeting and segmentation to reach specific audiences, and time your announcements so that they appear when a user is active but not actively working on a critical task.

Create a slideout to announce events and webinars

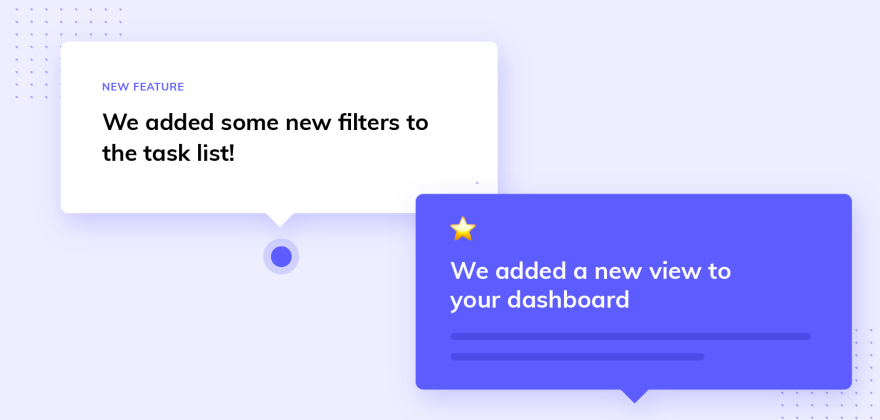


► **Recommended UI pattern: Slideout**

Once users are familiar with your product's core features, it's time to introduce them to more advanced features or functions that can help them do more with your product.

Take this opportunity to get some face time with your customers. Organize a webinar that gives an in-depth look at some of the advanced features of your product. Then create a slideout to announce the webinar in-app. Link your CTA to the webinar registration page and voilà!

Keep regular users in the loop about product releases



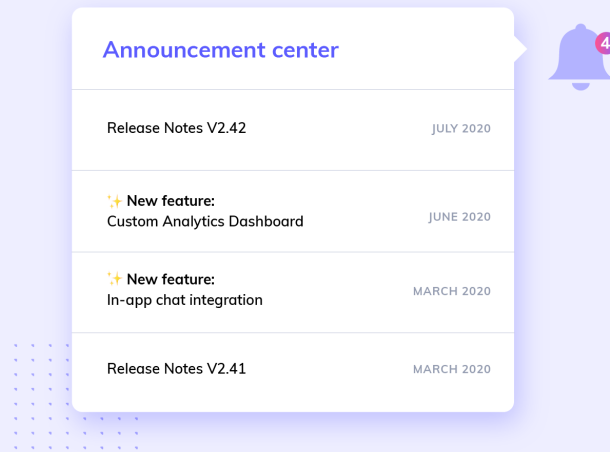
► Recommended UI pattern: [Slideout](#) | [Tooltip](#) | [Hotspot](#)

Regularly share product updates and releases to show your regular users that their feedback is being implemented and that they are investing in a product that is continuously improving.

Create slideouts to announce the major **product releases** every month, or point out changes with a simple tooltip or hotspot upon login.

11. ANNOUNCEMENT CENTER

Announce important changes without disrupting a user's workflow

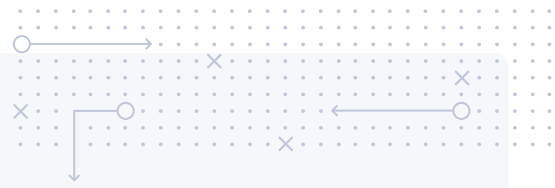


► Recommended UI pattern: Launchpad

Create an announcement center to keep your users informed about feature announcements, product release notes, upcoming maintenance windows, etc—without interrupting their workflow. Whenever there's something new to see, a subtle badge will appear above the icon, similar to an alert on your phone.

If you're an Appcues customer

Learn how to install and customize the Launchpad [here](#).



CHAPTER

04

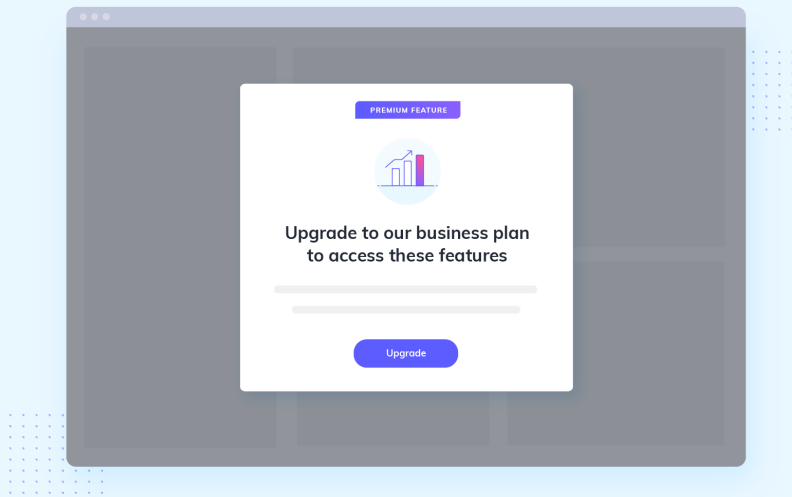
Upselling and expansion

It's no secret that it's a heck of a lot cheaper to upsell to an existing customer than it is to acquire a new one. In fact, it's **3X cheaper** to generate expansion revenue—revenue from upsells, add-ons, and cross-sells—than it is to acquire new customers.

So what's the secret to increasing expansion revenue? Contextual, timely, self-service upgrade prompts.

The trick is making it as tempting and easy as possible for customers to upgrade—without bombarding them with constant messages to pay up or else. Make your customers aware of premium features by positioning reminders within the user interface itself or by providing targeted prompts based on user behavior.

Create upsell opportunities for power users



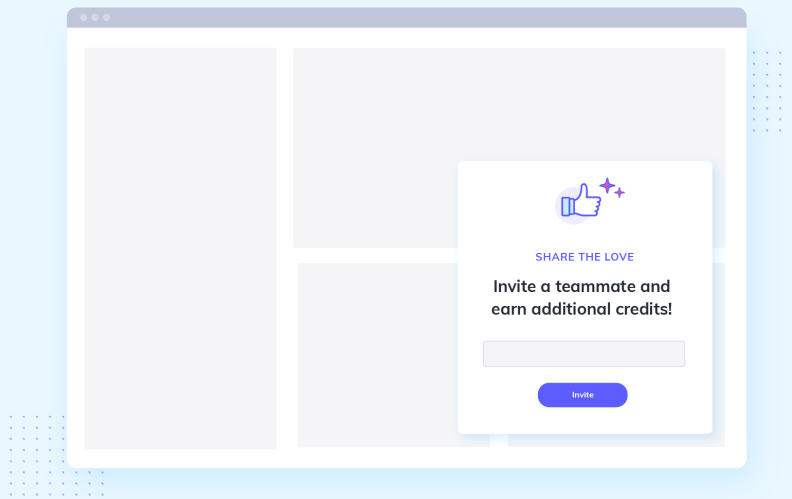
► **Recommended UI pattern: Modal**

If you have gated features that can only be accessed as part of a premium plan, now is a great time to highlight the value of these additional features to your active users with an **upsell prompt**.

You can do this simply by gating premium features behind an informative modal. Letting users see—but not use—premium features can increase their desire to upgrade. Similarly, using a transparent layer behind a paywall modal can often provide just the glimpse freemium users need to decide upgrading is worth the extra cost.

Another approach is to create a segment of your power users (folks who have been logging in frequently and/or have completed goals). Then, create a modal with a short video that explains about the value of these premium features. Add a CTA to upgrade from their existing plan at a discounted rate.

Incentivize user invites with a referral campaign



► **Recommended UI pattern: Slideouts**

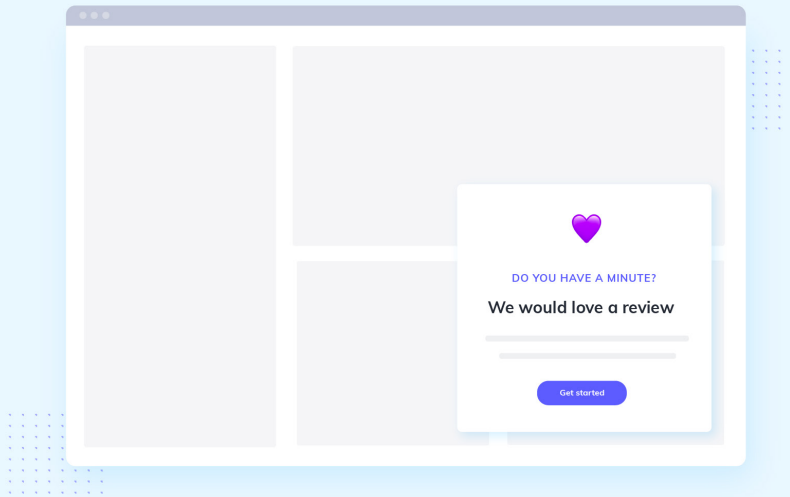
Your champions are probably already telling friends and coworkers about your product. Provide a little extra incentive to them by running a referral campaign and rewarding them for every lead they generate.

One way to do this: Create a flow with 2 slideouts. The first slideout should ask users if they want to provide referrals in exchange for a gift card. Add 3 buttons that say something to the effect of: “No thanks,” “Remind me later,” and “I’ll do it now.”

If a user clicks on the “I’ll do it now” button, the second slideout should appear with a form that asks users to enter the email addresses of all the people who might be interested in your product. If they click on “Remind me later,” use it as an event for targeting to remind them with another flow. If they click on “No thanks,” take that at face value and dismiss the flow.

14. SOCIAL PROOF CAMPAIGNS

Run in-app campaigns to generate customer reviews and testimonials



► Recommended UI pattern: Modals | Slideouts

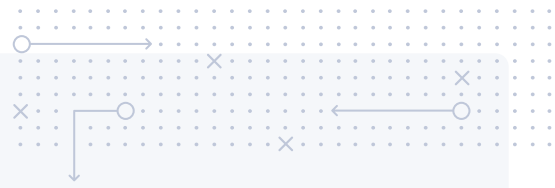
Reach out to users while they're in your app to generate more customer reviews on the App Store, G2, Google, etc.

Use a slideout or modal to ask users if they would be interested in leaving a positive review of your product. If they click “yes,” trigger another modal or slideout that provides them with the appropriate links. Your marketing team can later follow up with a gift card once the review gets published.

Similarly, you can ask users if they'd like to share a testimonial about their experience with your product. If they click yes, prompt another slideout or modal with a form that lets them submit their testimonial without leaving your app.

If you're an Appcues customer

Rather than collecting testimonials manually, you can use Appcues CSV exports to download form entries and upload them into your organizational tool of choice.



CHAPTER
05

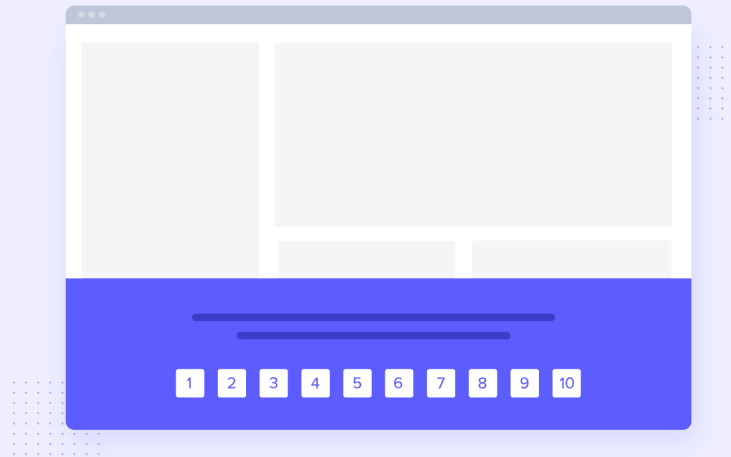
Customer surveys and feedback

Are your customers happy? What do they really want? These seemingly basic questions can feel overwhelming and complex. Trying to intuit your customers' feelings about your product—and why they feel that way—can easily send you down a philosophical rabbit hole.

In reality, getting to the answer is simple. If you don't know how happy your customers are, just ask! NPS and open-ended surveys offer concrete ways to track sentiment over time, helping you gather feedback and insights to influence both the product and customer experience.

While it's important to measure customer satisfaction throughout the lifecycle, your regulars and champions are often going to be your best source of feedback. Soliciting input from these power users can shed light on improvements you can make for everyone. And, crucially, regulars and champions want to give this feedback. These late-stage users are already invested in your product and want to feel like their opinions are being used to shape the roadmap.

Measure user sentiment with an NPS survey



► Recommended UI pattern: NPS Survey

Net Promoter Score (NPS) is an invaluable tool for taking the temperature of your user base. Use NPS to gather quantitative feedback from your regular users.

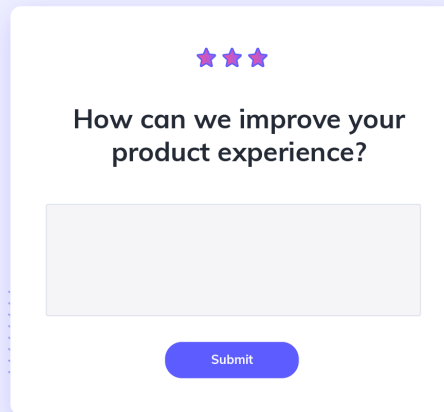
You can then leverage this data to segment your users according to customer sentiment. These segments can be highly valuable when you are running feedback or promotional campaigns and want to target especially satisfied or dissatisfied customers.

If you're an Appcues customer

To create an NPS survey, simply click on the NPS page in your Appcues dashboard to get started. Full instructions for setting up an NPS survey can be found [here](#).

Additionally, Appcues allows you to target flows based on NPS scores and leverage your NPS surveys by creating segments of detractors, passives, and promoters.

Gather qualitative product feedback with in-app surveys



► **Recommended UI pattern:** [Modal](#) | [Slideout](#)

Ask users for qualitative feedback.

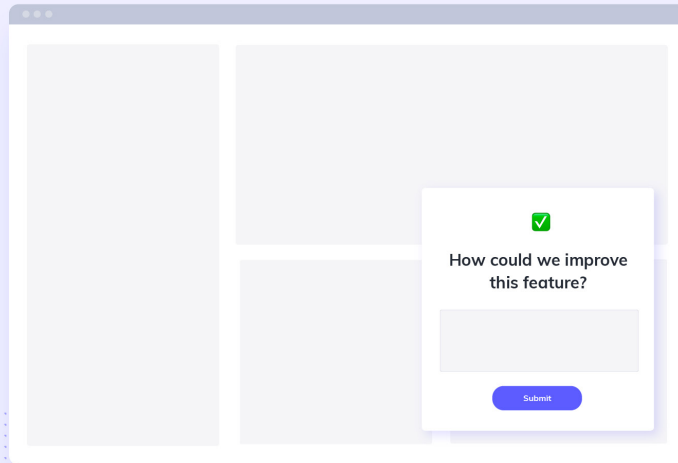
You can start by creating a slideout or modal and asking a general question like “how can we improve your product experience?” Or you can get more specific, for example: “Out of 3 features listed below, which one would you find most useful?”

Add **[feedback forms](#)** so that users can submit their responses without ever leaving your app.

If you're an Appcues customer

Learn more about adding feedback forms to your flows [here](#).

Give users a direct line to your product team with feedback forms and 30-minute calls



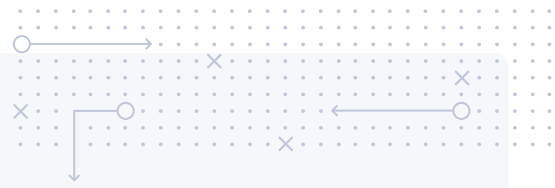
► Recommended UI pattern: Slideout

Your champions are looking for opportunities to **provide actionable feedback**. Take advantage of this by creating a survey designed to solicit feedback from your most committed users.

You can even put your champions directly in touch with your product team by creating a slideout with a link to schedule a 30-minute call using a tool like Calendly.

If you're an Appcues customer

An easy way to create a segment of your happy customers is to choose 'NPS score' as a property and target flows to users who have given you an NPS of 10.



CHAPTER
06

Self-service support

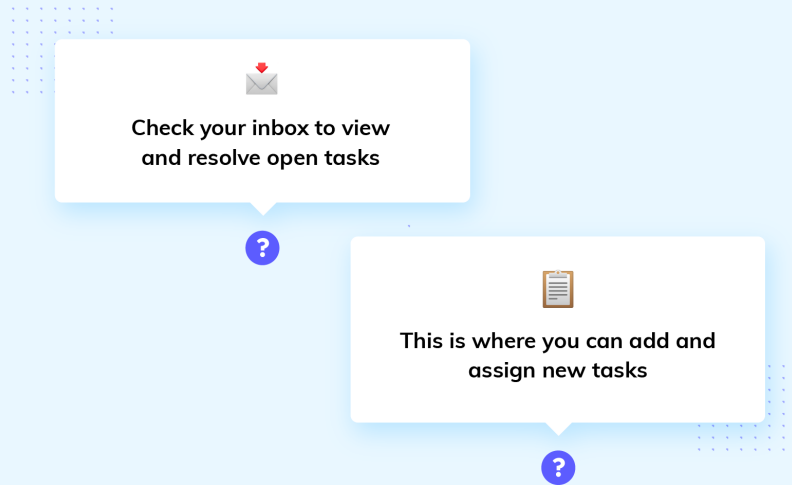
When it comes to customer support, 2 things are always true:

1. Customers want answers now
2. Support staff only have so many hours in the day

Unfortunately, these things are usually at odds. While customers want fast, effortless, friction-free responses to their questions, customer support can easily find itself under water and backlogged if the volume of support requests starts ramping up. That's where proactive, self-service support solutions come in.

Help your users help themselves by making frequently asked questions, tutorials, and documentation easy to access from inside your product itself.

Alleviate support burden with contextual in-app guidance



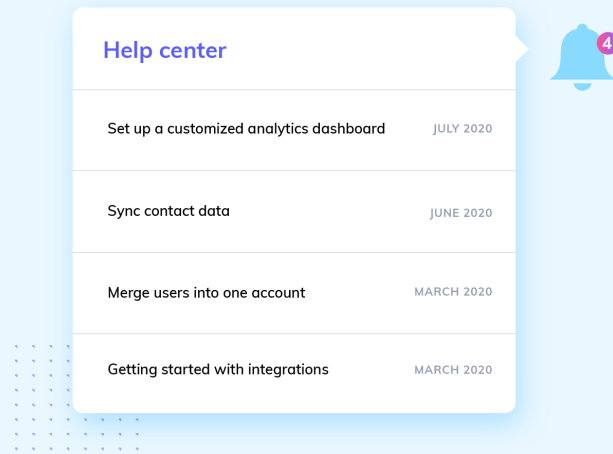
► **Recommended UI pattern:** [Hotspots](#) | Hotspots + [tooltips](#)

Turn your top help articles and most frequently asked questions into **[in-app guides](#)**.

Provide contextual help to your users by placing hotspots next to the most critical features of your product. (We recommend using the question mark (?) symbol to make it more intuitive for your users.)

You can even create walkthroughs based on your top help articles. Add permalinks of these walkthroughs in your support docs to allow users to help themselves—without creating a support ticket.

Provide on-demand, opt-in support with a help center



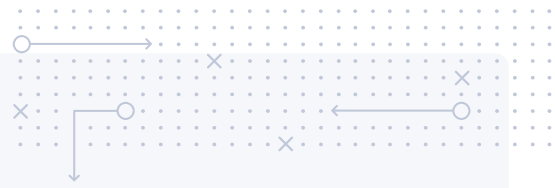
► **Recommended UI pattern:** Launchpad

At a certain point, users want to take charge and learn by doing. Providing unsolicited guidance at these stages can be counterproductive. At the same time, users shouldn't be left to fend for themselves when they're feeling lost. Strike the right balance with an unobtrusive help option that offers **opt-in support**.

If you're an Appcues customer

Use the Launchpad to make it easy for users to access specific, contextual guidance when they need it. The Launchpad can be used to recall flows and tutorials relevant to whatever page the user is currently on.

This doc explains how to create an embedded help center using the Launchpad.



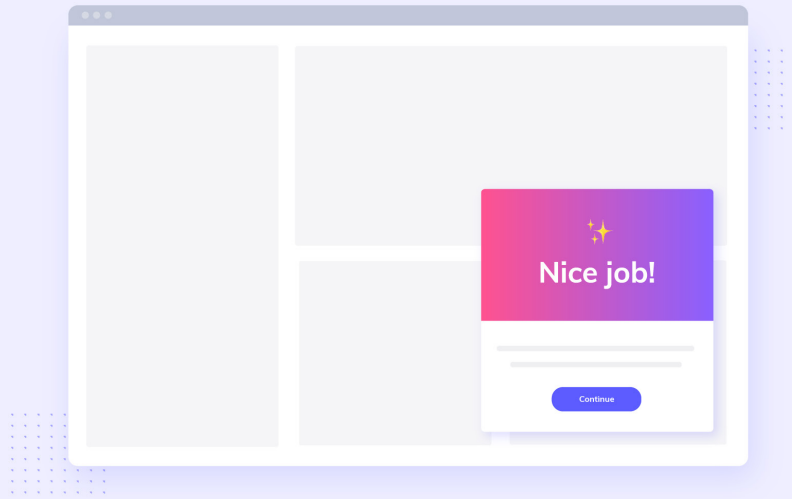
CHAPTER
07

User delight

After regular users get used to using your product, it's easy for them to fall into a rhythm of complacency and stop thinking about the value your app adds to their daily lives. Getting users to adore your product requires providing them with a consistently delightful experience—both with your product and with any human touchpoints they have along the way.

Use milestones as a way to bring the success and usefulness of your app to the forefront. And add touches of **gamification**—the application of game elements to non-gaming environments—to motivate users and make tasks more enjoyable.

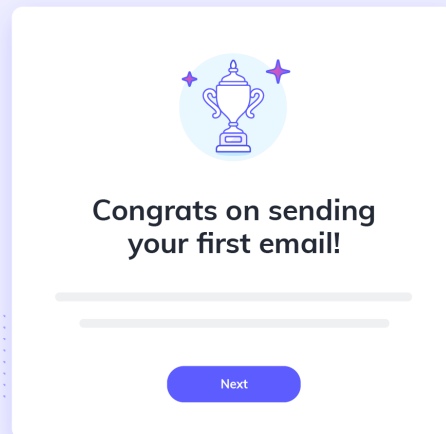
Delight users with elements of gamification



▶ Recommended UI pattern: Slideouts

Celebrating your users' success increases motivation and engagement. It also provides important positive feedback that lets users know their actions have produced the desired effect.

Acknowledge users' loyalty and hard work by celebrating key milestones



► Recommended UI pattern: [Modals](#) | [Slideouts](#)

In most cases, your champions are your true power users. They've achieved a lot with your product. Let them know you're invested in their success by **celebrating their progress.**

A simple way to do this is by sharing success milestones and usage statistics with them. For example, if you offer a CRM tool, you can congratulate your champions on reaching the 1,000 email campaigns mark.

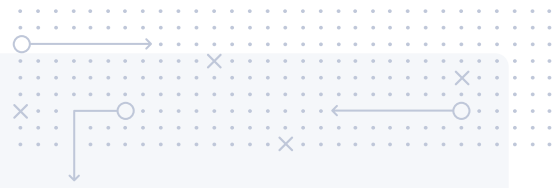
Start by identifying the important milestones within a typical user's journey—whether that's accomplishing a task, achieving a certain outcome, or even a customer anniversary—and set a single modal to appear when that milestone is reached.

If you're an Appcues customer

Use Appcues Goals to trigger a modal when a user accomplishes an important task. If, for example, your product is a CRM tool, you can set the celebratory modal to appear when a user sends their first email campaign.

To do this, set "first email campaign" as a goal in Appcues and create a flow targeting users who meet that goal.

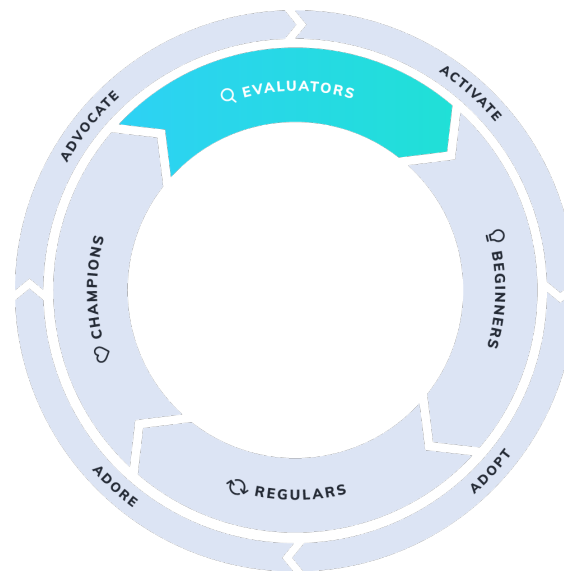
If you have a single-page app, you can also use Appcues' **event triggering** feature to prompt a flow when a user takes a specific action within your product.



APPENDIX A.

The Product-Led Growth Flywheel

The Product-Led Growth Flywheel is a framework for growing your business by investing in a product-led user experience. In this framework, the user experience is designed to generate higher customer satisfaction and increased advocacy, which in turn drives compounding growth of new user acquisition.



Evaluators

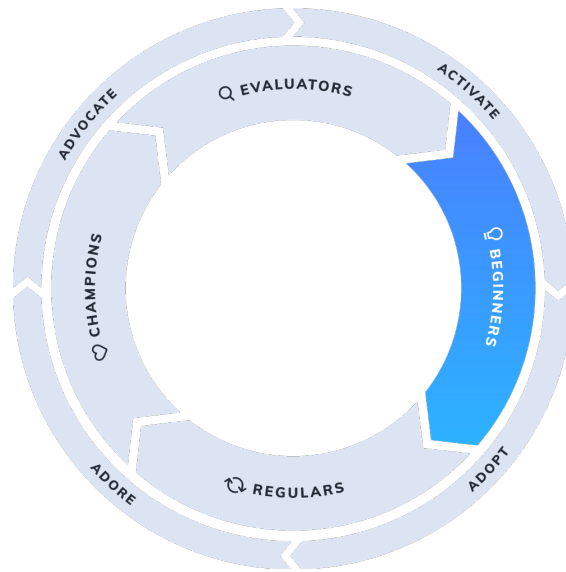
Evaluators are new or free users with no prior experience with your product. They are cautiously excited about your product as a solution to their problems and are probably evaluating a variety of solutions—including your competitors.

Ease of use, core functionality, and unique features are at the forefront of these users' minds.

Evaluators don't care about the nuances of your product or the wide range of use cases that you can address—they are solely focused on how you relate to their most pressing needs.

► Evaluators are typically:

- In a trial or demo phase—they've just started playing around with your product
- Haven't connected their tech stack with your product—they're not using real data yet
- Not using your product in their current workflows
- Still searching for the best solution to a specific problem that they are trying to solve



Beginners

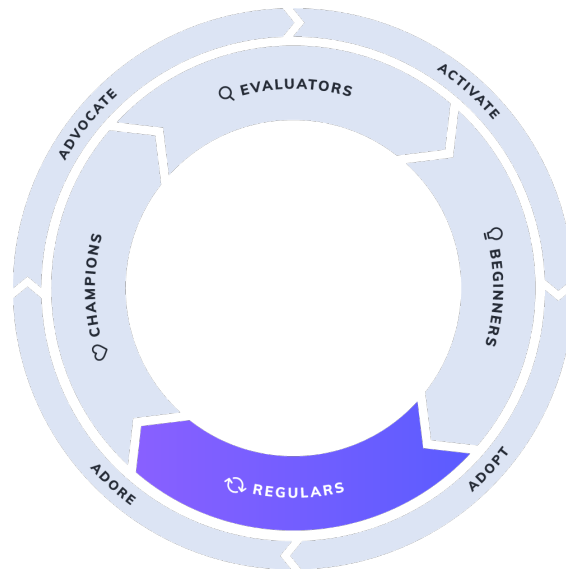
Beginners are activated users who understand how your product can meet their needs and deliver value—and they're excited about it!

They're eager to learn more and are starting to explore your product's features and functionality more deeply. It won't be long before they start thinking about results and ROI.

Give these users the freedom to do what they need to do, but remember that they're still learning and are sensitive to blockers.

► **Beginners are typically:**

- Starting to use real data and receive tangible value
- Not using advanced functionality or implementing sophisticated use cases
- Feeling confident that your product is the best solution to solve their core problem



Regulars

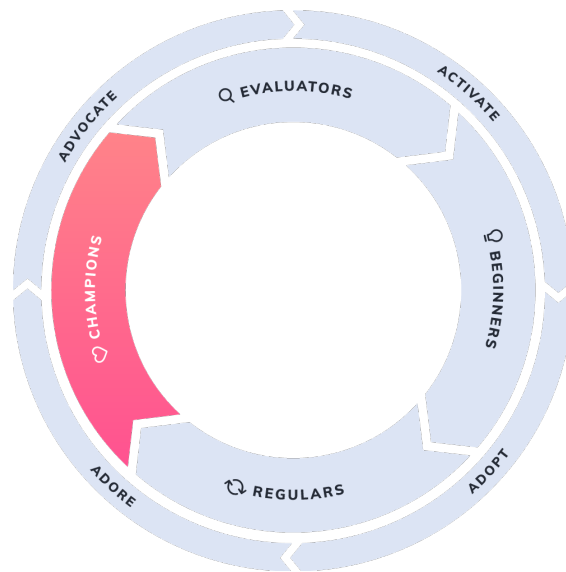
Regulars are the bread and butter of your user base.

These users log in frequently and rely on your product for multiple use cases. Regulars may not always get excited about using your product, but it has become key to achieving their goals.

Most regulars enjoy learning about advanced features and functionalities and about how they can extract more value from your product.

► Regulars are typically:

- Incorporating your product into their workflows
- Using your product to complete core parts of their job
- Defaulting to your product as a possible solution when new problems arise
- Exploring deeper layers of your product and discovering new use cases



Champions

Champions are the users who recommend your product to their colleagues, friends, and social media followers as the go-to solution for specific business outcomes.

They have formed an emotional connection with your brand and your product—at this point in the relationship, you are providing value outside of just the job to be done.

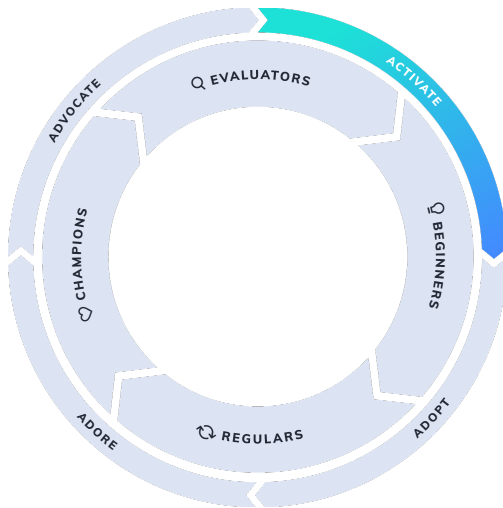
Your product has become more than just a tool for them—it has become an integral part of how they define their role inside and outside of their organization. These users not only care about your success but also want to be at the forefront of your product development.

► Champions are typically:

- Pushing the limits of your product with new use cases
- Actively participating in the future of your product by providing thorough feedback
- NPS promoters
- Wearing your brand's t-shirt

Activate

To move users through the flywheel and onto the next stage in their journey, you need to help them activate. To do this, you should be focused on helping evaluators reach their **aha moments** within your product as quickly as possible through streamlined, personalized onboarding.



How to measure success

- Activation rate
- Time to value
- Product-qualified leads (PQLs)
- Free trial or freemium conversion

► Your goal during this stage

Your goal is to guide users to their aha moments as quickly as possible by reducing **time to value**.

Let evaluators experience your product in action or show them around to help them get a basic understanding of its core functionality—but don't try to teach them everything there is to know about your product straight away.

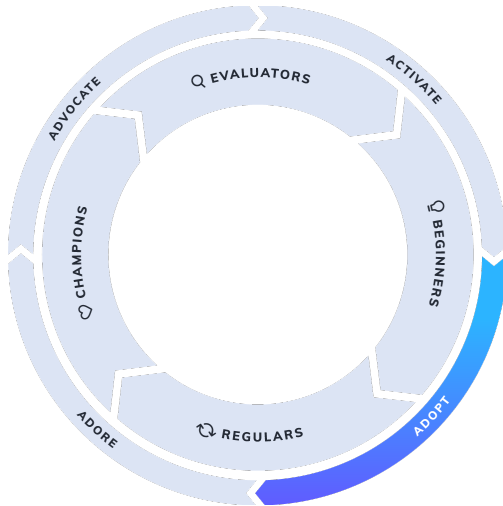
► Things to keep in mind

Mapping out the user journey will help you identify and visualize your users' aha moments and define your activation criteria.

Leveraging analytics tools at this stage can be very helpful, but make sure you are supplementing quantitative data with qualitative insights from customer interviews and surveys.

Adopt

In order for beginners to graduate to the next stage of the user journey, they need to fully adopt your product. **Product adoption** means full buy-in—it's when a user really understands the power of your product and depends on it regularly.



How to measure success

- Feature adoption
- Time to value
- Free trial or freemium conversion (if applicable)
- Usage and retention (daily, weekly, monthly)

► Your goal during this stage

At this stage, you should aim to reduce possible friction by making extra guidance available and easy to access.

Your goal is to **facilitate product adoption** by helping users form habits around your product. You want them to think of your product as the go-to solution for a certain problem or task. Once users adopt your product, they become regulars.

► Things to keep in mind

Identifying and eliminating friction points in your user's journey plays a vital role at this stage.

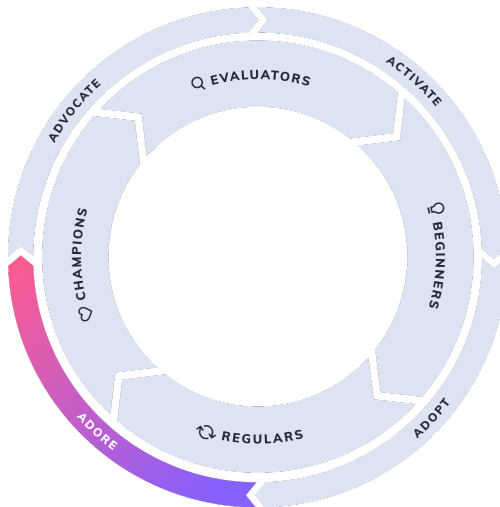
Use tools like **Fullstory** to understand user behavior, and analytics tools like **Amplitude**, **Heap**, or **Mixpanel** to keep a pulse on your users' progress. You can also identify blockers by looking at the stages at which the majority of your users drop off.

In addition to product analytics, your support team, feature requests, and bug reports can be highly valuable resources at this stage. Synthesize and analyze this data to identify and prioritize areas where your users need contextual assistance.

Adore

Once users adopt your product, they become regular users.

A robust feedback loop, regular **product updates**, timely announcements, and gamification are some of the engagement levers that can help turn your regular users into champions of your product.



How to measure success

- Monthly active users
- Monthly retention rate
- Feature adoption and usage
- Feedback frequency
- NPS score

► Your goal during this stage

Your goal is to turn customer satisfaction into delight. You want to keep these users healthy and engaged by encouraging them to adopt new features, expand to new use cases, and provide feedback.

The goal here is more than just habitual usage or product adoption—it's emotional. To move users through the flywheel, you need them to adore your product.

► Things to keep in mind

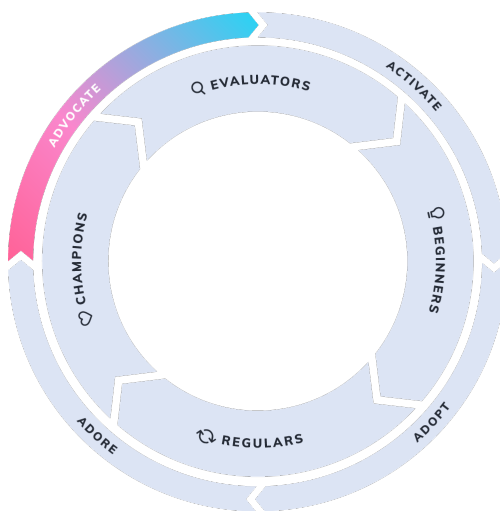
When creating **in-app surveys and feedback forms**, start by writing down all the questions that you want to ask your customers and then prioritize them. Proper placement and timing of your survey requests matter—identify the moments in your product where your users are most likely to provide feedback.

Bear in mind your goal is to help these users be more successful with your product. Make sure you are not interrupting their current workflow by inundating them too many in-app messages—only make announcements that might be of interest to the individual user.

Advocate

At this stage, you need to convert your **happy users' sentiments** into tangible social proof. Your regulars become true champions when they start taking pride in being an active contributor to your growth.

It's time to ask them for input on your product roadmap, a quote you can share on your landing page, a review that will help your prospects make an educated decision, or a case study that will help your marketing and sales teams share a success story with your broader audience.



How to measure success

- NPS score: percentage of promoters
- Product feedback
- Number of online reviews
- Referrals
- New user acquisition
- Case study opportunities

► Your goal during this stage

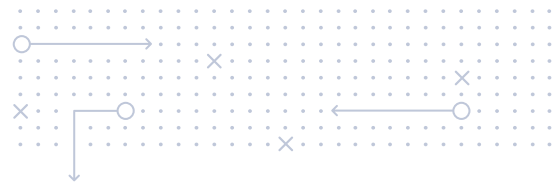
At this stage, you want to close the loop by turning positive customer sentiment into tangible social proof, making it easier to acquire new users and keep the flywheel spinning.

Your goal is to get your champions to advocate for your product through feedback, testimonials, case studies, event participation, and 5-star reviews on public platforms.

► Things to keep in mind

Before you can create targeted referral campaigns, you'll need to define the criteria for your product champions. A good starting point is to segment according to NPS responses—giving a 9 or 10 on an NPS survey is a good indicator that a user is ready to become a champion for your product.

Once you have finalized your criteria, start by running one campaign at a time. If you are asking your champions to submit reviews on public platforms, don't ask for a testimonial at the same time. Remember, you want to make it easy for your users to contribute towards success.



Further resources

We hope that this playbook has given you deeper insights into how to engage your users in-app, and that you are excited to take away concrete, actionable ideas for improving your product experience. For more resources:



Head to the Appcues Blog for more in-depth content on user onboarding, feature releases, upselling prompts, customer surveys, and more.

[Learn more](#)



Check out ReallyGoodUX for weekly UX design inspiration from our favorite products.

[Learn more](#)



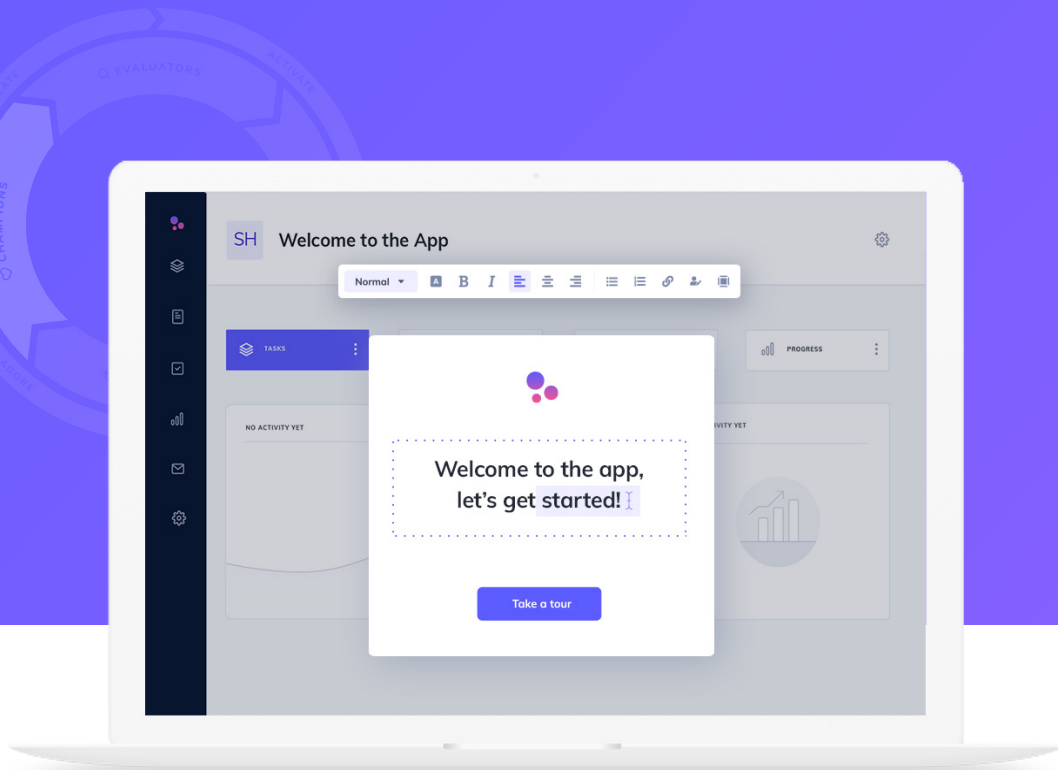
Join us over on the Product-Led Growth Collective, a community-driven resource, made for growth-minded folks, by growth-minded folks.

[Learn more](#)



Turn your product into a growth engine

Appcues has helped thousands of companies convert new users into raving fans with automated and personalized onboarding, product tours, surveys, and announcements. Accelerate your customer lifecycle and fuel sustainable growth with Appcues.



Start free

Schedule time with a product specialist today