

The ChurnZero guide to

product WalkThroughs

Guide your users from sign-up to success



Table of contents

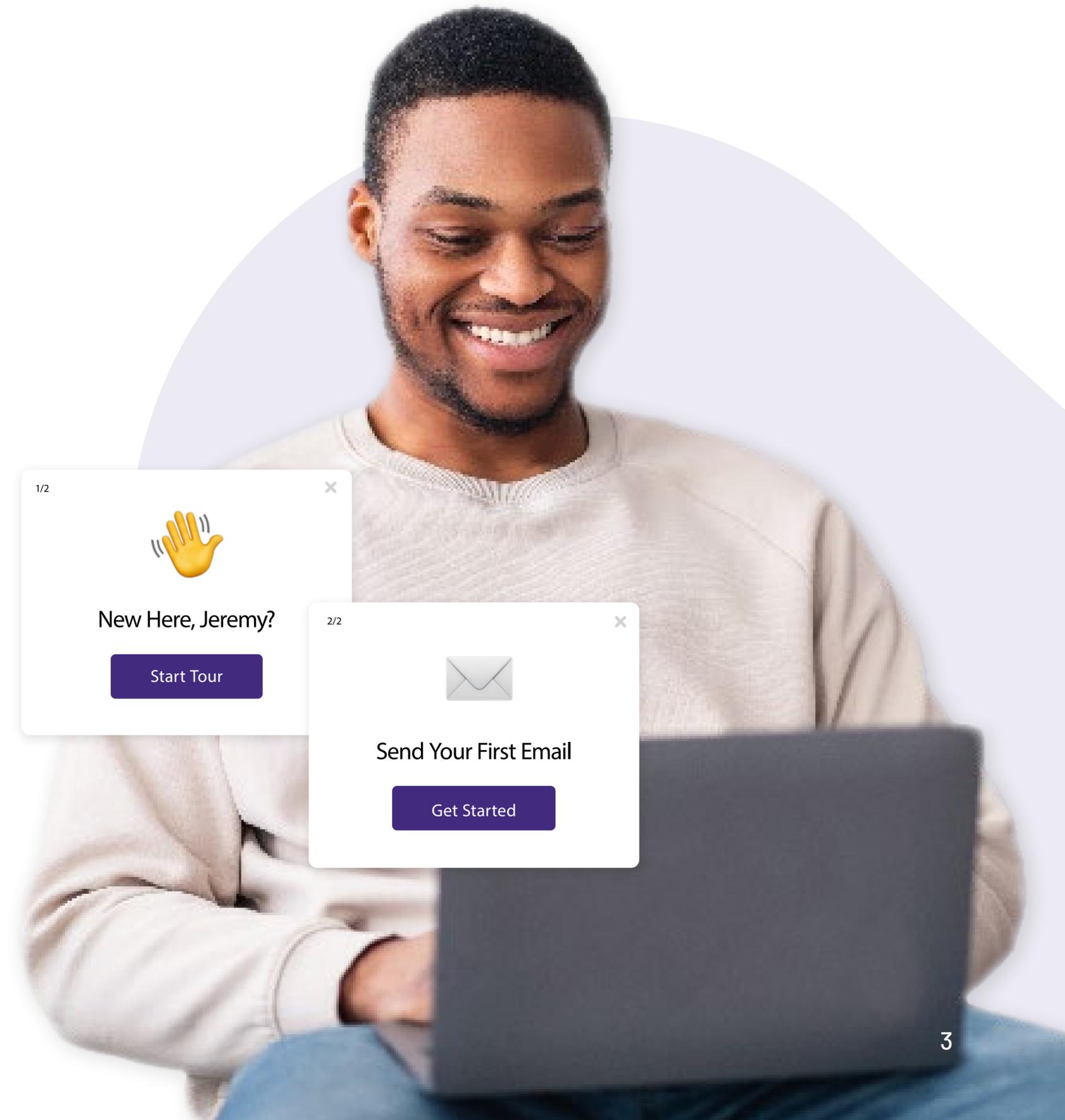
What is a WalkThrough?	3
How WalkThroughs benefit your Customer Success team	4
Types of WalkThrough steps and when to use each	6
How Customer Success teams use WalkThroughs (with examples)	9
How to customize your WalkThroughs	16
How to measure success with WalkThroughs	18
WalkThrough tips and tricks	19

SECTION 1

What is a WalkThrough?

A WalkThrough is a multi-step guide that integrates into your product's interface to direct users through specific features and showcase the application. Drawing from the wealth of customer data within your ChurnZero ecosystem, WalkThroughs help you deliver assistance to the right user at the ideal time.

In addition to providing a more tailored user experience, WalkThroughs reduce adoption friction. They empower users to become self-sufficient learners as they discover your product. With step-by-step guidance, users can navigate your product with ease and stay focused on the features that drive the most value.



SECTION 2

How WalkThroughs benefit your Customer Success team

Accelerate Time to Value

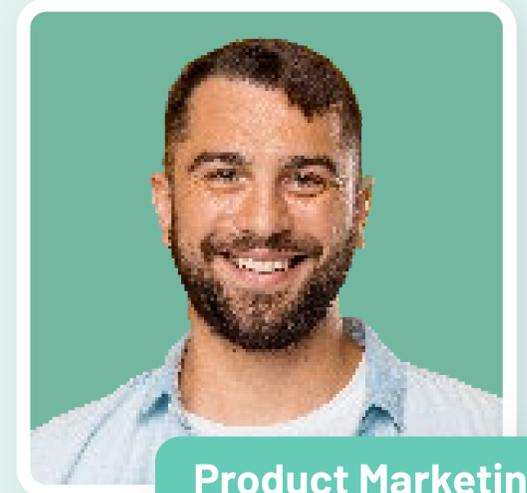
Day-zero user adoption is essential for long-term success. Shortening the amount of time it takes customers to realize value from your product increases the likelihood they renew. WalkThroughs help accelerate value realization by providing an interactive way to introduce users to your app and highlight new or underused features.

Reach users at exactly the right time

Target accounts and contacts with WalkThroughs based on their attributes, product usage, lifecycle stage, product edition, financials, ticketing data, email engagement, and more. This additional context makes your WalkThroughs smarter and more purposeful, and therefore, more relevant to customers.



Customer Success Manager



Product Marketing



Onboarding Specialist

SECTION 2: How WalkThroughs benefit your Customer Success team

Design and deploy without burdening your dev team

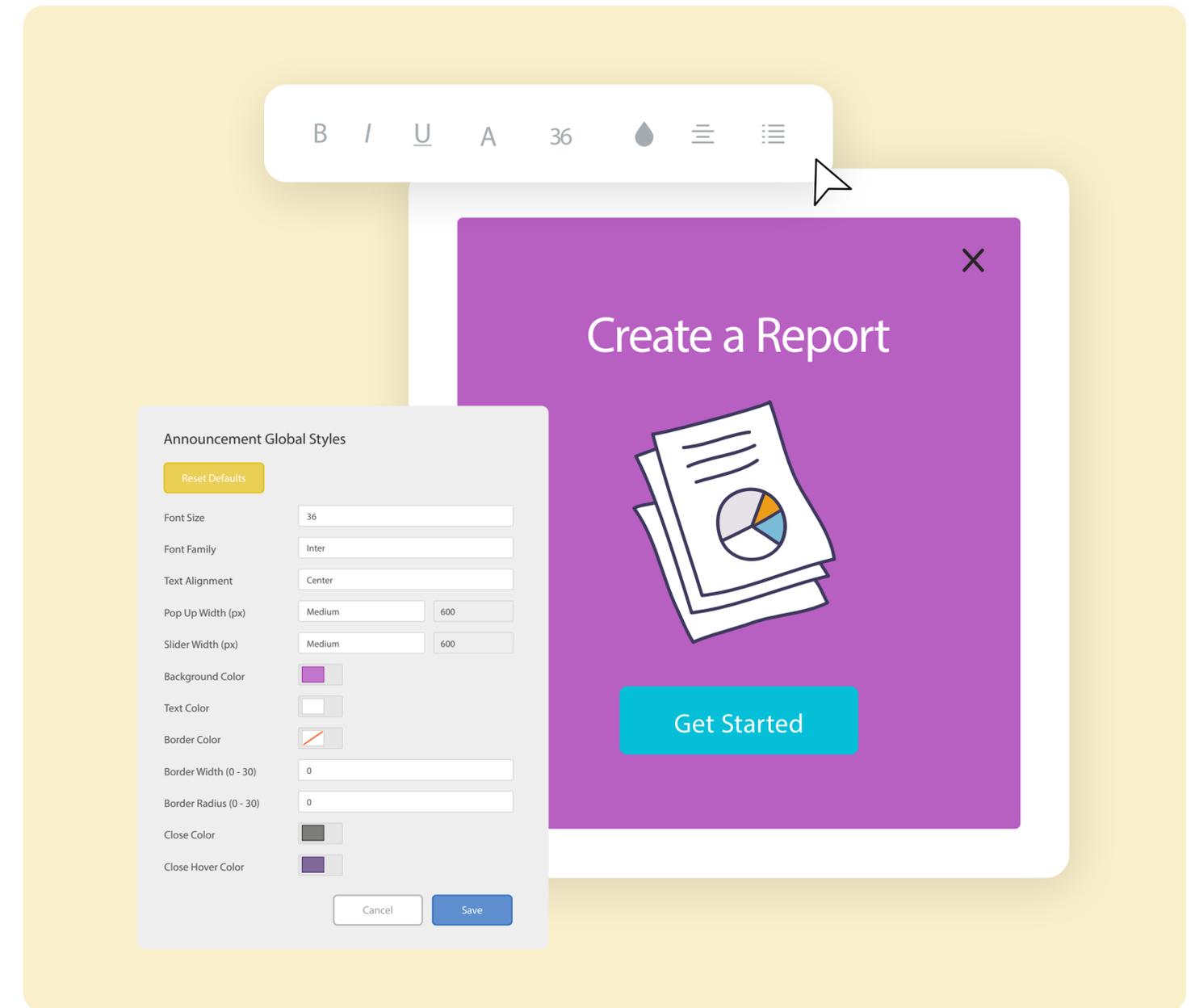
Design customized, white-labeled WalkThroughs in a snap with ChurnZero's no-code WYSIWYG editor. Use our style settings to match WalkThroughs to your brand so they look like a native part of your application and provide a unified customer experience. Best of all, you can easily create WalkThroughs without involvement from your dev team.

Offset support costs and free up resources

Lower operating costs by reducing the need for staff intervention related to support and training requests with self-service guidance.

Stay ahead of adoption lags

Support your customers beyond a one-time welcome tour. With WalkThroughs, you can mitigate declines in adoption before they start by delivering proactive, ongoing assistance to users in need of help. Foster deeper user adoption by highlighting misunderstood or underused product features based on your customer's engagement data.



SECTION 3

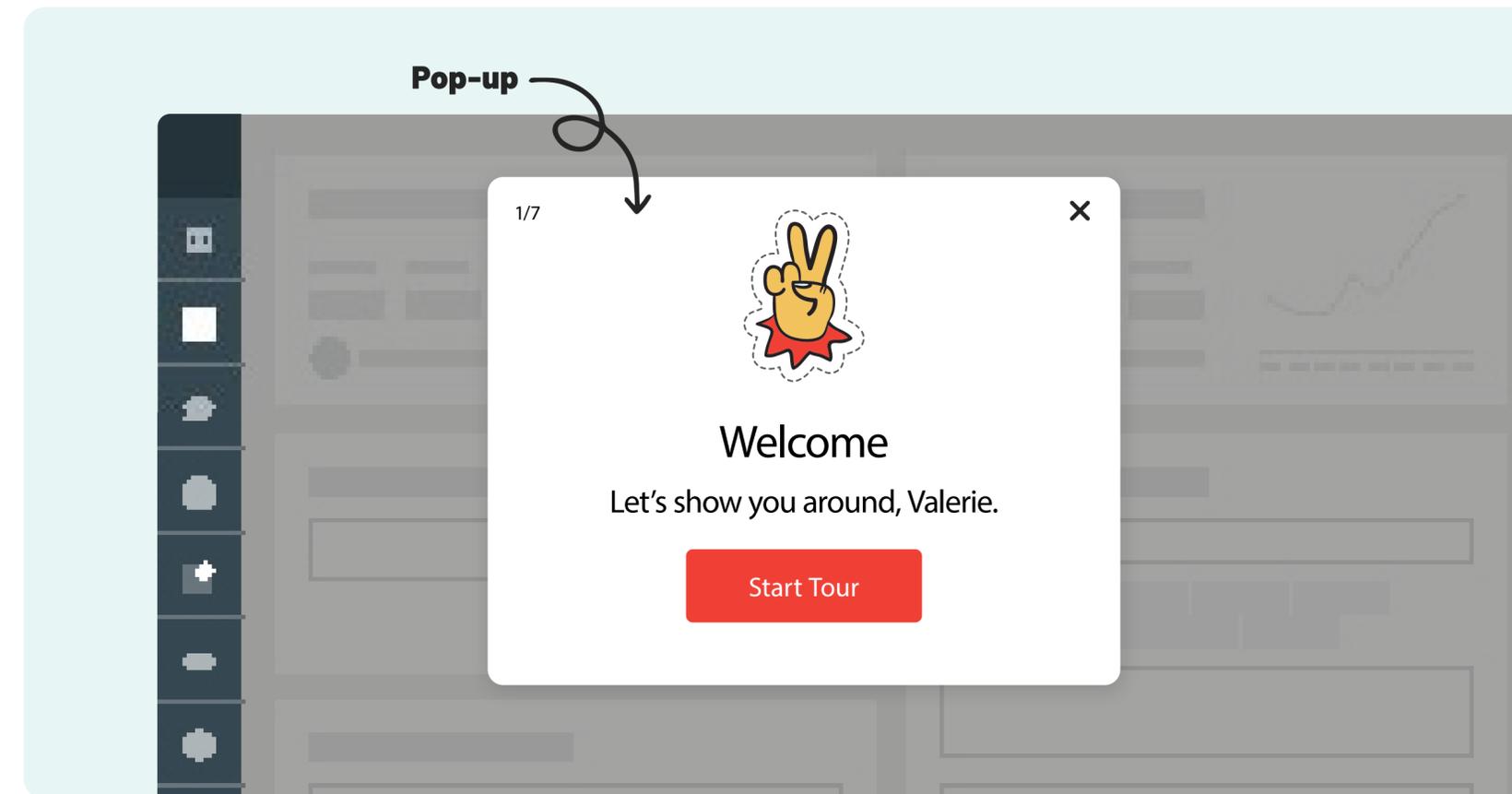
Types of WalkThrough steps and when to use each

ChurnZero offers four types of WalkThrough steps: pop-up, slider, tool tip, and anchor. With these types, you can adjust the prominence and placement of individual steps to better control the context and engagement of your message.

Pop-Up

Pop-ups appear in the middle of the screen and gray out the app behind it. To engage with the app, the user must close the pop-up or move to the next step of the WalkThrough.

When to use: If you want to capture someone's attention. A pop-up is an effective way to begin a WalkThrough as it commands attention by taking over the entire screen. Be thoughtful when using pop-ups as too many can feel intrusive.



SECTION 3: Types of Walkthrough steps and when to use each

Slider

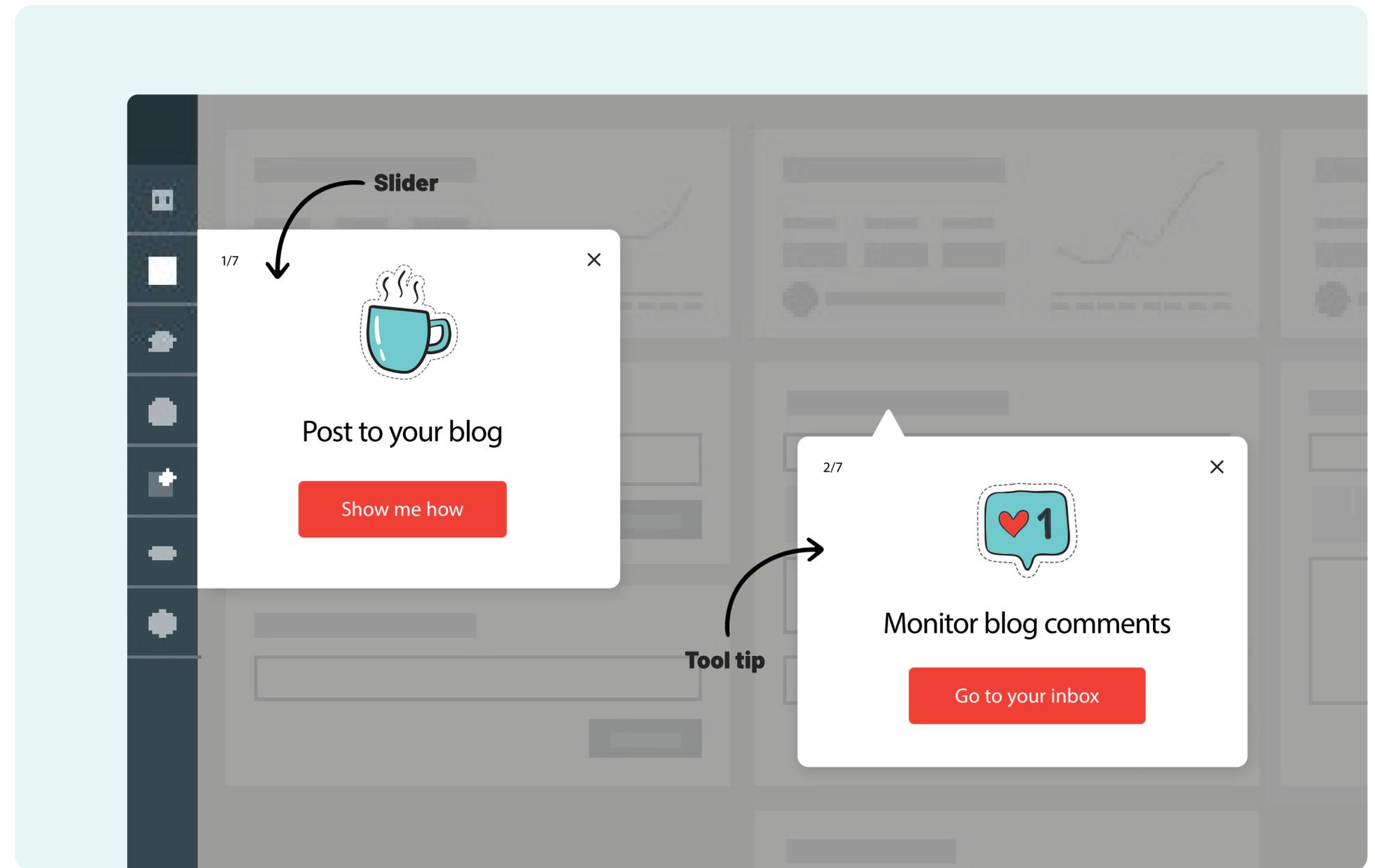
Sliders appear from a selected direction (e.g., top center or bottom right). While sliders cover part of the functionality, they do not block the user's engagement.

When to use: If you want to present general information or tips. Since sliders do not directly point to specific part of the page, they are good options to use for a first or final step in a WalkThrough. If you think a pop-up is too intrusive, a slider is the next best option.

Tool tip

Tool tips highlight a specific element of a page.

When to use: If you want to focus a user's attention. Tool tips are ideal for assigning instructions to a specific element of a feature, such as "Click this button" or "Fill out this field."

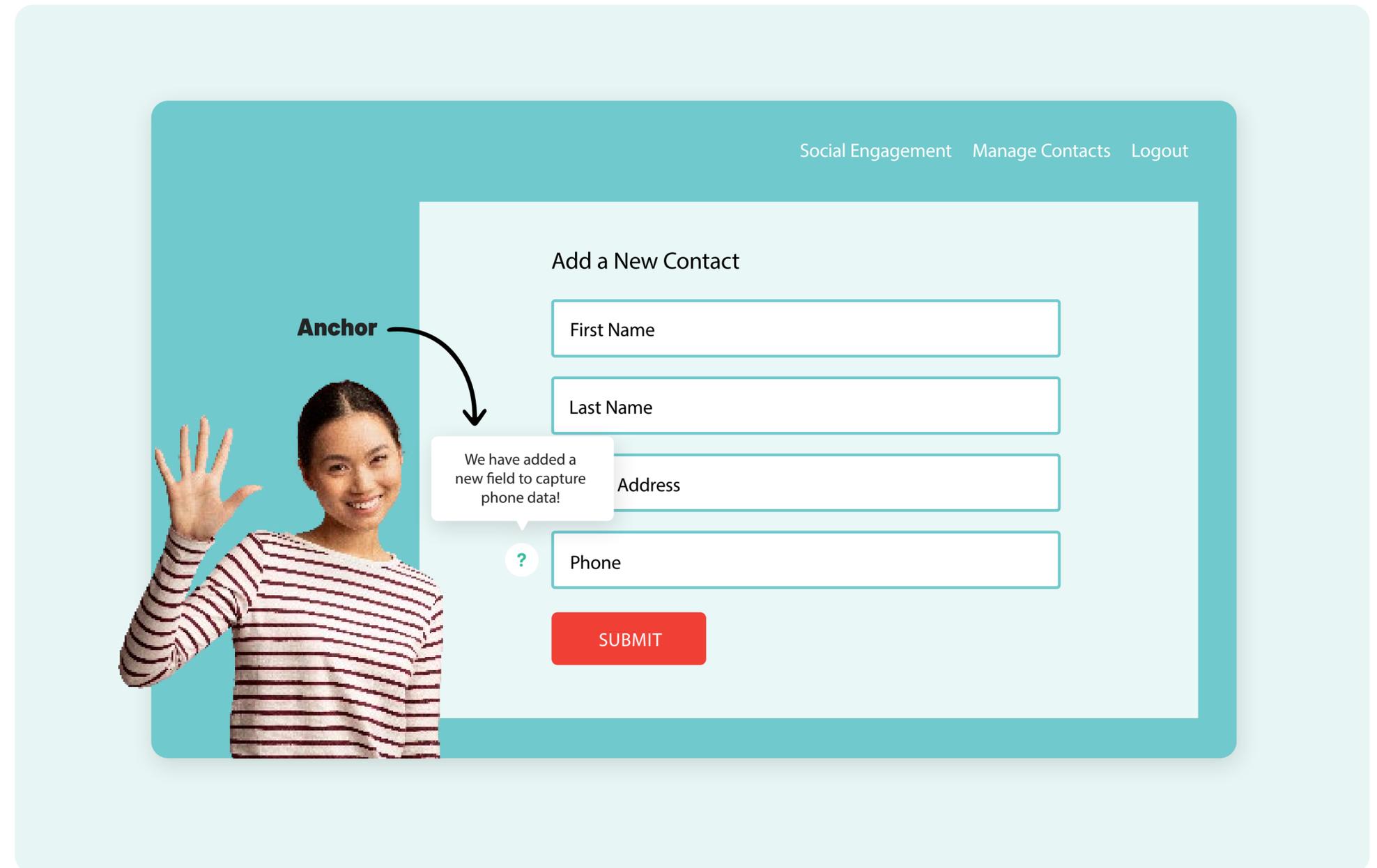


SECTION 3: Types of Walkthrough steps and when to use each

Anchor

Anchors allow you to insert an icon onto your page, which serves as the trigger to begin a WalkThrough. Select your target and then customize how you want your anchor to look.

When to use: If you need WalkThrough guidance to remain accessible. Anchors are particularly useful reminders for features that are infrequently used.

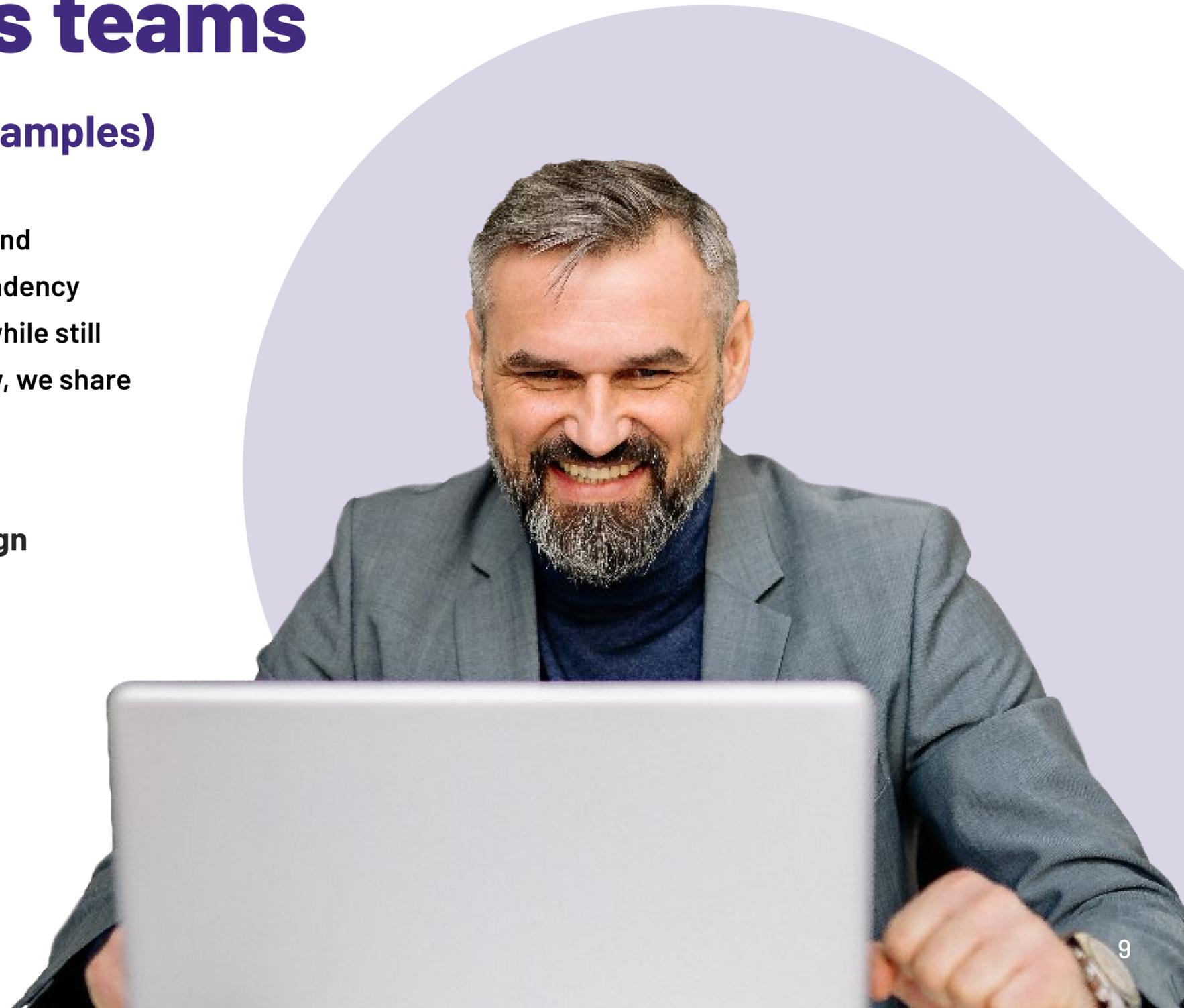


SECTION 4

How Customer Success teams use WalkThroughs (with examples)

WalkThroughs accelerate Time to Value which drives feature adoption, and ultimately, customer loyalty. These self-service guides reduce the dependency on Customer Success and product teams to demonstrate functionality while still providing a personalized user experience at scale. In the examples below, we share a few of the most common uses cases for Walkthroughs.

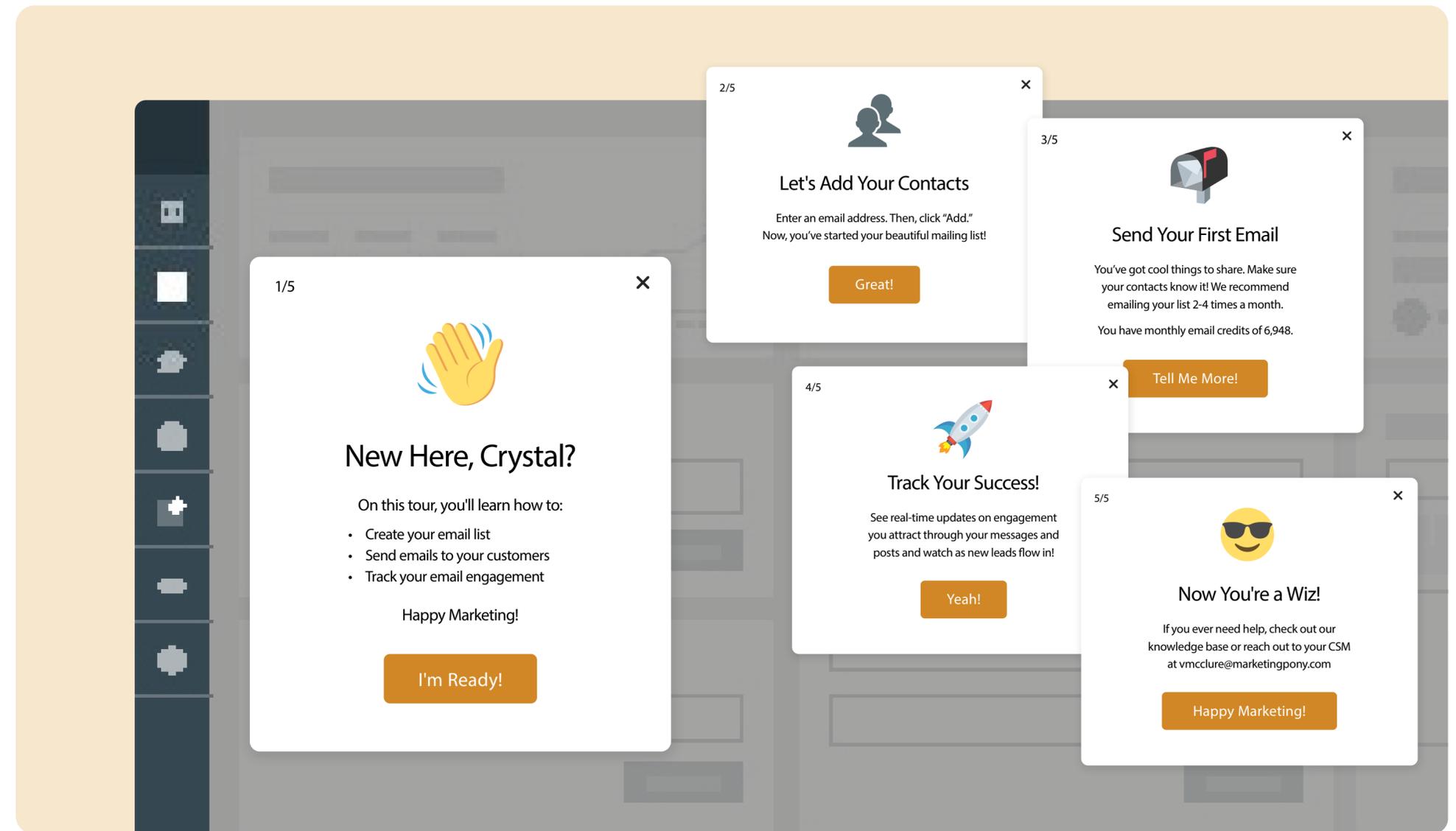
1. Onboarding and product tours
2. Ancillary features
3. Proactive support
4. New features/UI redesign
5. Underused features
6. Upsells and cross-sells



SECTION 4: How Customer Success teams use WalkThroughs

1. Onboarding and product tours

Your churn rate is deeply tied to the quality of your users' onboarding journey. To increase product adoption, onboarding needs to focus on product benefits (what's in it for the user?). Use WalkThroughs to showcase sticky, high-value features that keep customers engaged and help them achieve their unique business goals.



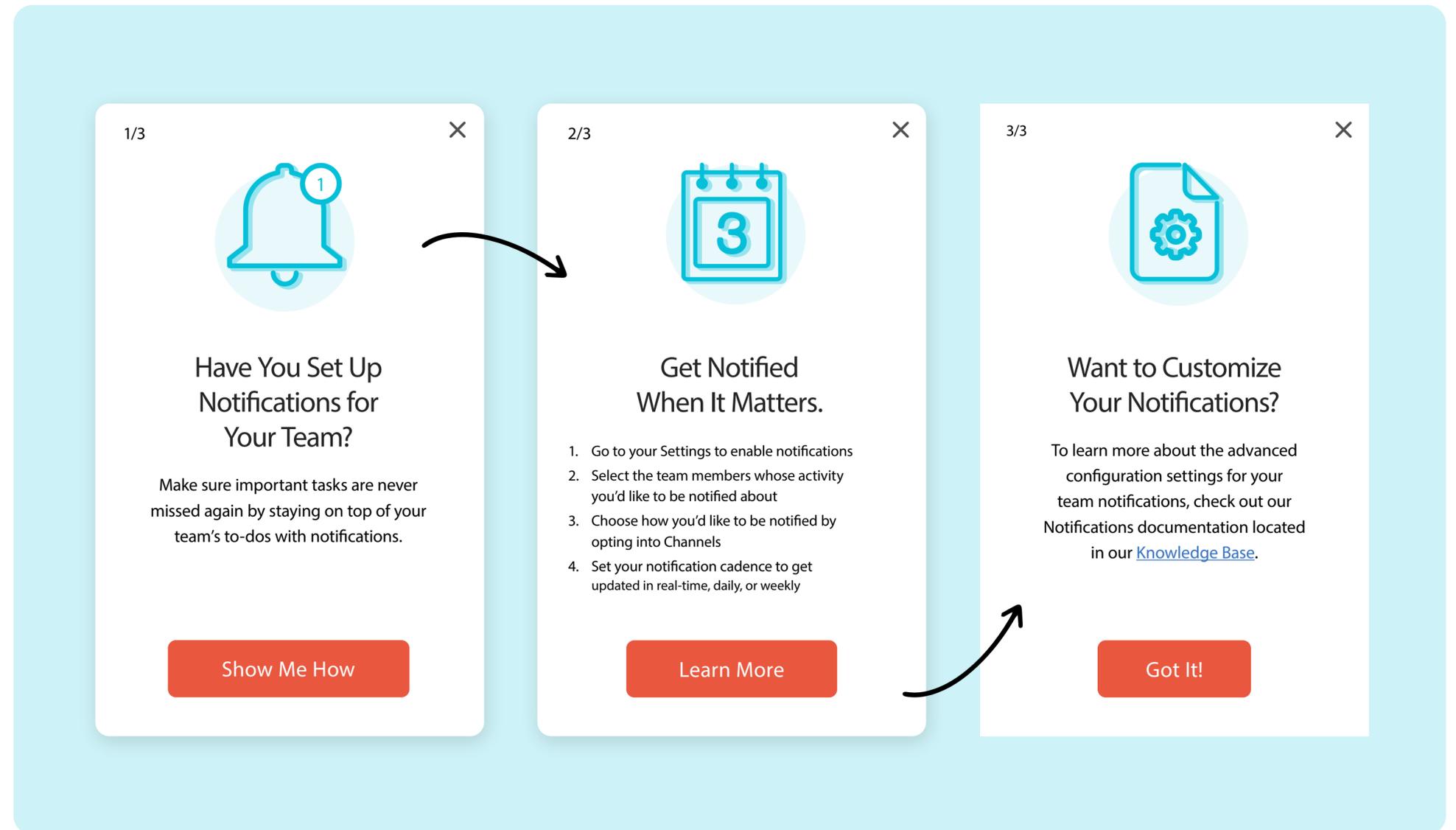
Example

Show "Onboarding: Use Case A" WalkThrough for new users in the last X days whose "Primary Goal" matches "Use Case A."

SECTION 4: How Customer Success teams use WalkThroughs

2. Ancillary features

During onboarding, users are still getting acquainted with your product. Don't overwhelm them by introducing ancillary features that aren't vital to achieving their primary goal. Providing too much information too soon increases the chances that customers miss or skip over your message. Highlight non-essential features, such as shortcuts and settings, during subsequent sessions once engagement is steady.



Example

Show the "Super Admin" WalkThrough for users who are "Admin" contacts at "Enterprise" accounts that have been "Onboarded."

SECTION 4: How Customer Success teams use WalkThroughs

3. Proactive support

Alleviate the influx of tickets to your support team and offset redundant requests by creating WalkThroughs that proactively address how to use less intuitive features. You can set the system to keep a WalkThrough visible on the page using an anchor – an extremely useful feature to highlight new features, or address areas of trouble for new users.

1
1/3
Show Me Around
This Integration Set Up!
Let's Go

Account Setup

2
2/3
When new fields are added to your sync, these fields will be populated by the next routine sync. You can have the integration run on a schedule of 15 minutes, 30 minutes, 1 hour, or 24 hours.
Got It

3
3/3
You should be looking for a 16-digit ID. You will find this in the Settings tab of the connected platform.
All Set

Integration
Marketing Pony

Integration Sync Time
Every 15 Minutes

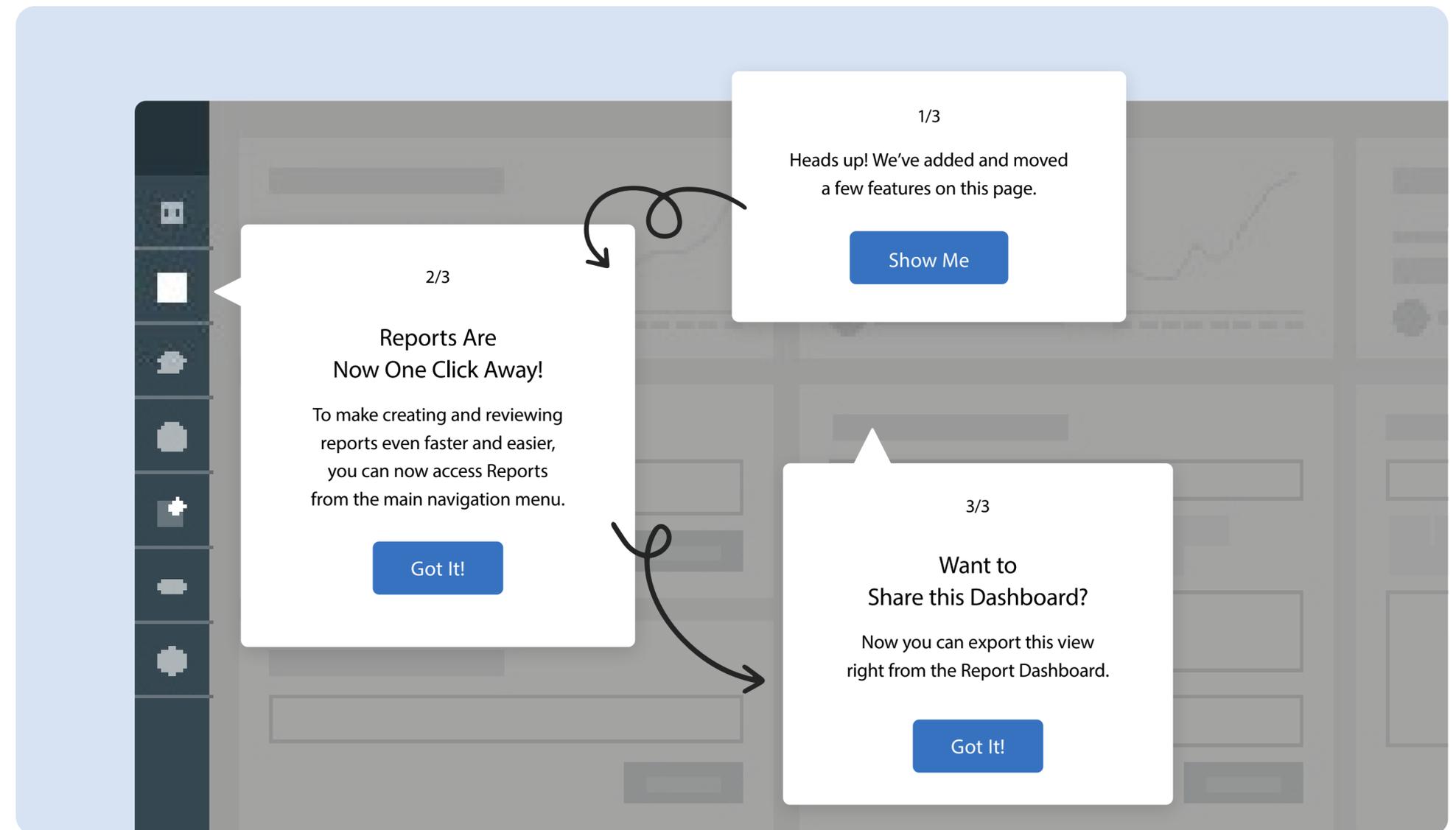
Access Key

Example Show the "Integration Sync Time" WalkThrough for all users.

SECTION 4: How Customer Success teams use WalkThroughs

4. New features/ UI redesign

WalkThroughs provide a timely and organic way to debut your latest product enhancements. In the instance of a redesign, WalkThroughs can launch automatically to existing users reorienting them to the product, while excluding new customers who are unfamiliar with the old experience.



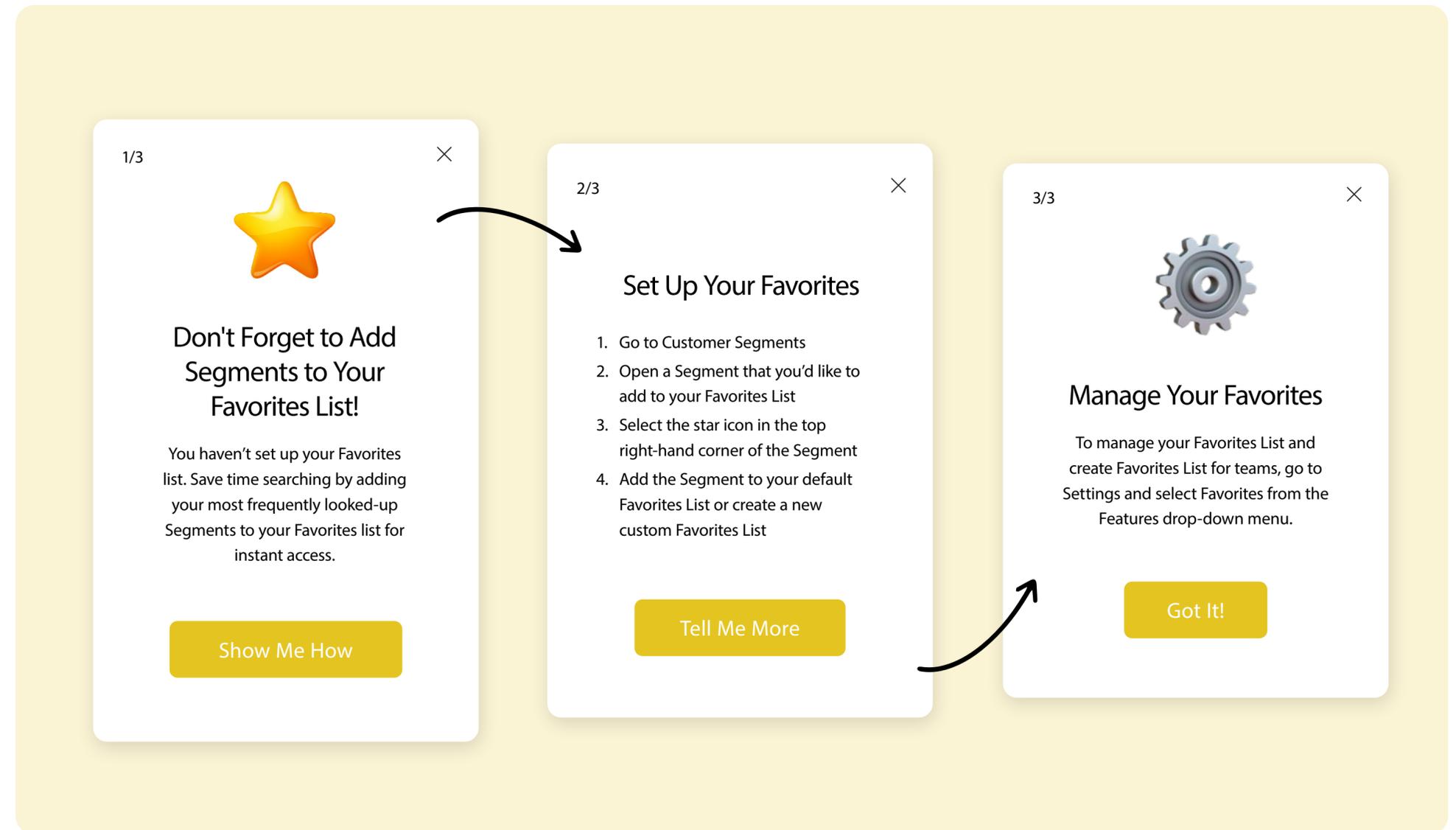
Example

Show the "Feature Redesign: Reports" WalkThrough only to users who have used "Reports."

SECTION 4: How Customer Success teams use WalkThroughs

5. Underused features

Target WalkThroughs based on customer behavioral data to showcase underused sticky features. Since feature usage differs depending on an account or user's goals and product proficiency, you want to adapt your guidance based on these variances.



Example

Show the "Don't Forget About Favorites" WalkThrough after a user has been with you for at least three months and logged in five times.

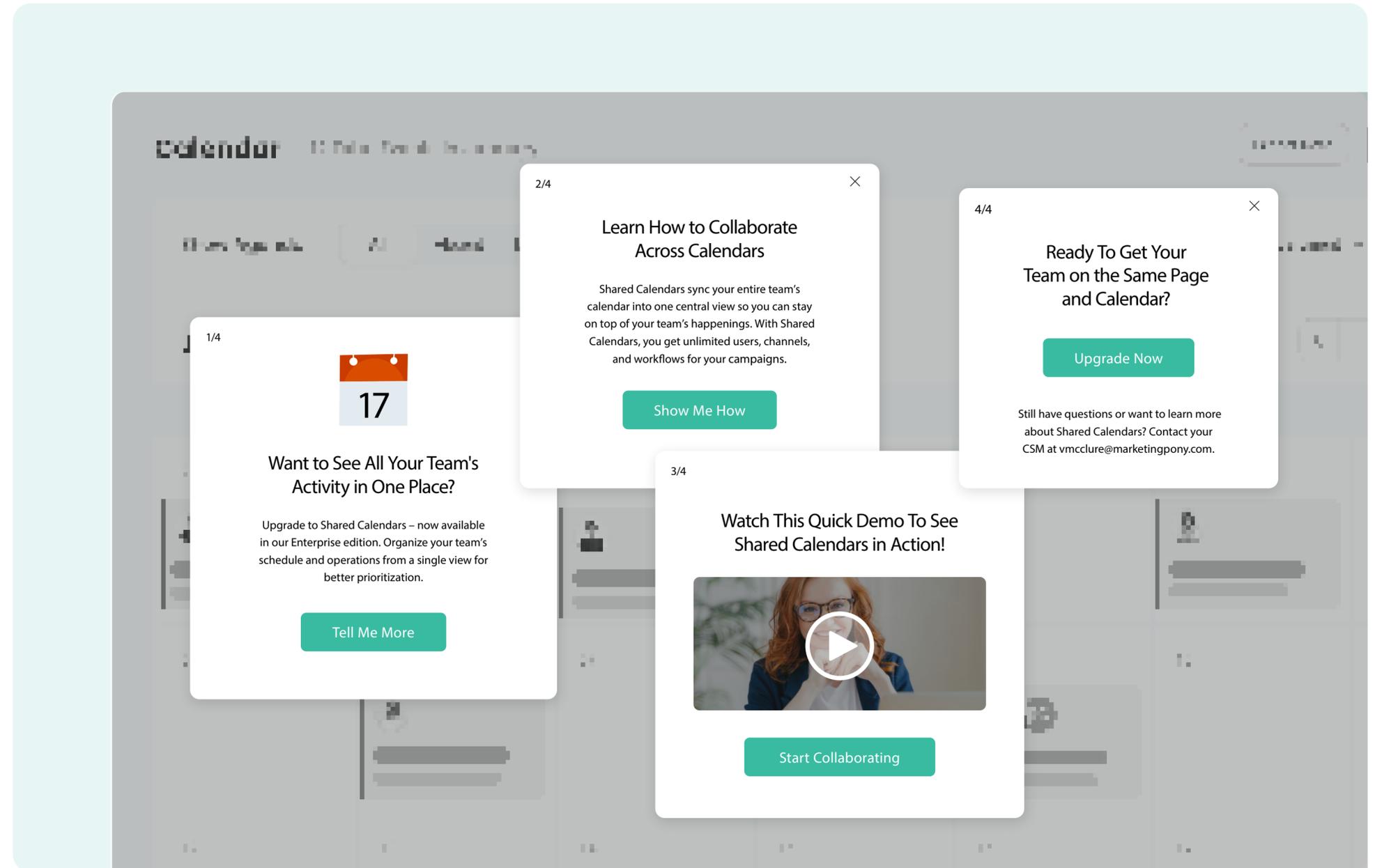
SECTION 4: How Customer Success teams use WalkThroughs

6. Upsells and cross-sells

Use WalkThroughs to promote relevant upsell and cross-sell opportunities to highly engaged customers. Analyze the product usage of your power users to identify the leading indicators of those who are most likely to upgrade and expand.

Example

Show the "Feature Upgrade: Shared Calendar" WalkThrough for users with daily or X% usage of feature "Calendar."



SECTION 5

How to customize your WalkThroughs

You can define each step's settings, style, and content to deliver a personal user experience.

Triggers

To optimize your message, choose how your users trigger a WalkThrough.

Trigger points include:

- **Page visit:** WalkThrough begins when a user visits the selected page.
- **Element click:** WalkThrough begins when a user clicks a particular element on the page.
- **Anchor:** WalkThrough begins when a user clicks on an icon that appears on the page.

The image shows a configuration panel for a WalkThrough step. It is organized into two columns of settings. The left column contains: 'Text' (input field with 'OK'), 'Font size' (dropdown menu with '14'), 'Font family' (dropdown menu with 'Lato'), and 'Alignment' (dropdown menu with 'Center'). The right column contains: 'Background color' (color picker with a light gray swatch), 'Text color' (color picker with a white swatch), 'Button color' (color picker with a teal swatch), and 'Button border color' (color picker with a teal swatch). Each color picker includes a small square swatch and a downward arrow.

SECTION 5: How to customize your WalkThroughs

Audience

WalkThroughs are powered by ChurnZero's segmentation. Set which accounts and/or contacts qualify to engage with your WalkThrough based on their attributes, usage, financials, ticketing data, surveys, and more.

Frequency

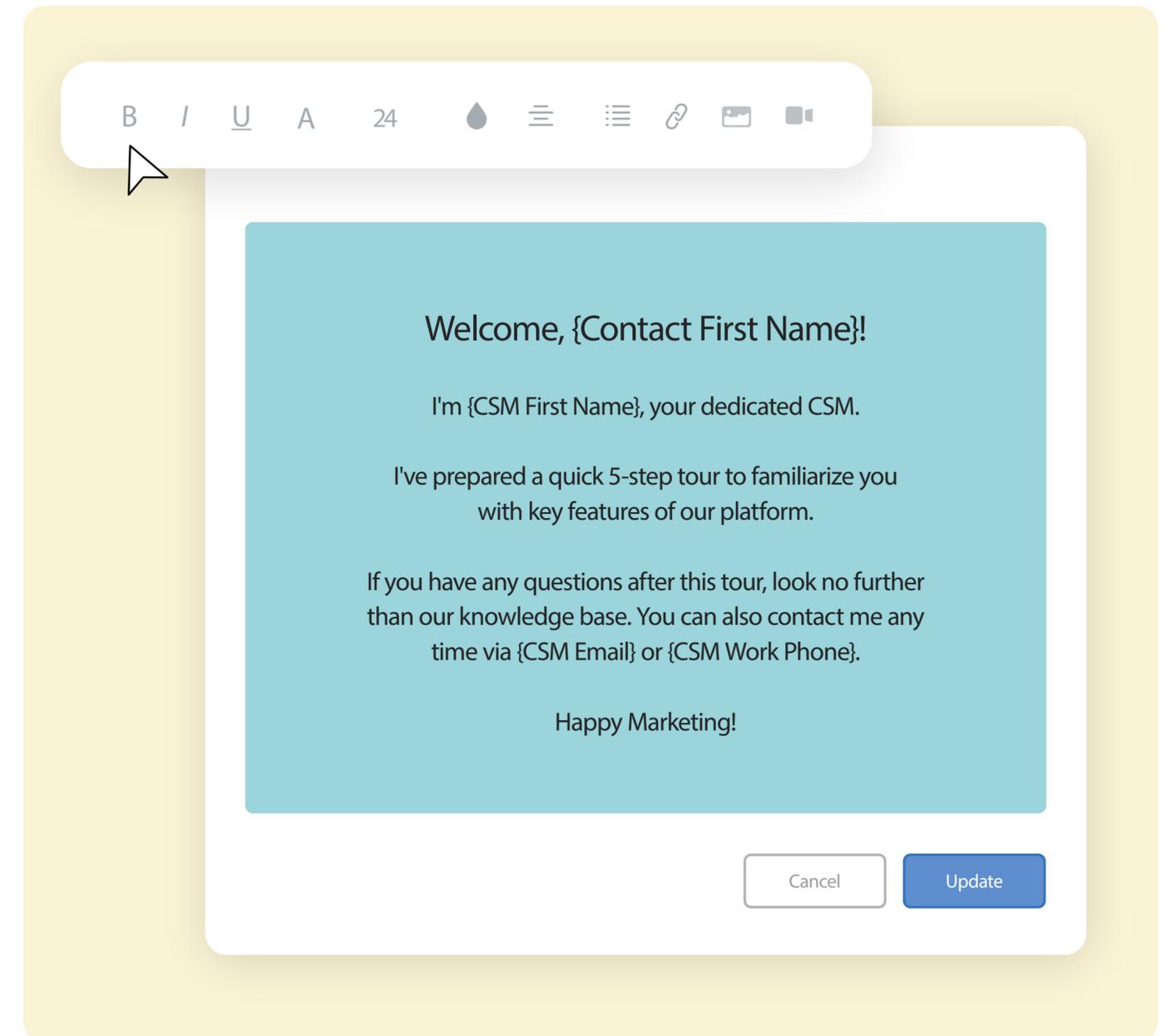
Set WalkThroughs to show either "Just Once" (e.g., the first time the user hits the defined trigger) or "Every Time" the trigger occurs.

Style

Design WalkThroughs to match your branding. You can change sizes, fonts, colors, and more to make WalkThroughs look like a native part of your application.

Bring it all together

WalkThrough configurations allow you to target users in highly specific scenarios and deliver relevant guidance at the ideal time. For example, let's say your application has a search function. Some of your users don't save their searches, although it's recommended for quicker results. To target these users, you can set the WalkThrough's **trigger** as the "Search" button, **frequency** as "Just Once," and **audience** as a segment of contacts who have searched at least three times but have never saved a search.



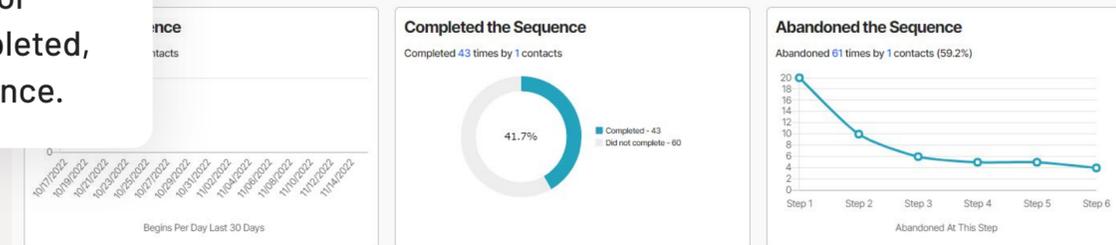
SECTION 6

How to measure success with WalkThroughs

WalkThrough reports provide powerful insights around how customers are engaging with your in-app guides to help you determine effectiveness.

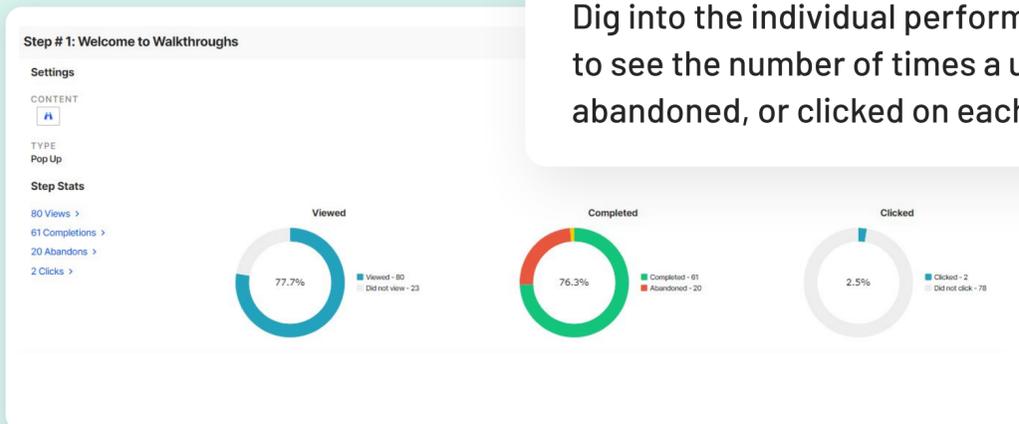
WalkThrough overview

Know when accounts or contacts began, completed, or abandoned a sequence.



WalkThrough step tracking

Dig into the individual performance of your WalkThroughs to see the number of times a user viewed, completed, abandoned, or clicked on each step.



Contact details

Track contact, account, start date, last date of action, last step, and status at every step of the WalkThrough.

Step Details	Contact Details	Begin Date	Last Action Date	Status	Last Step
>	>	6/24/2021 4:05 PM	6/24/2021 6:05 PM	Abandoned	Step 1: Welcome to Walkthroughs
>	>	6/21/2021 11:10 AM	6/21/2021 11:10 AM	Abandoned	Step 1: Welcome to Walkthroughs
>	>	6/2/2021 1:26 PM	6/2/2021 3:26 PM	Abandoned	Step 6: Salesy Sign off
>	>	6/2/2021 1:28 PM	6/2/2021 1:28 PM	Completed	
>	>	6/2/2021 1:24 PM	6/2/2021 1:25 PM	Abandoned	Step 4: Rich Editor 2
>	>	5/10/2021 10:45 AM	5/10/2021 10:46 AM	Completed	
>	>	5/10/2021 10:45 AM	5/10/2021 10:45 AM	Abandoned	Step 1: Welcome to Walkthroughs
>	>	3/3/2021 4:01 PM	3/3/2021 4:01 PM	Abandoned	Step 1: Welcome to Walkthroughs
>	>	12/8/2020 2:04 PM	12/8/2020 2:04 PM	Abandoned	Step 1: Welcome to Walkthroughs
>	>	11/30/2020 9:47 AM	11/30/2020 9:47 AM	Abandoned	Step 1: Welcome to Walkthroughs

SECTION 7

WalkThrough tips and tricks

At any stage in the customer lifecycle, but especially during onboarding, you don't want to make your customers hunt for value; you want to lead them directly to it. WalkThroughs should materialize your product or feature's value proposition in just a few quick steps. When creating a WalkThrough, you should consider your target audience, value, copy, offer, and distribution to ensure your WalkThroughs lead to product adoption.

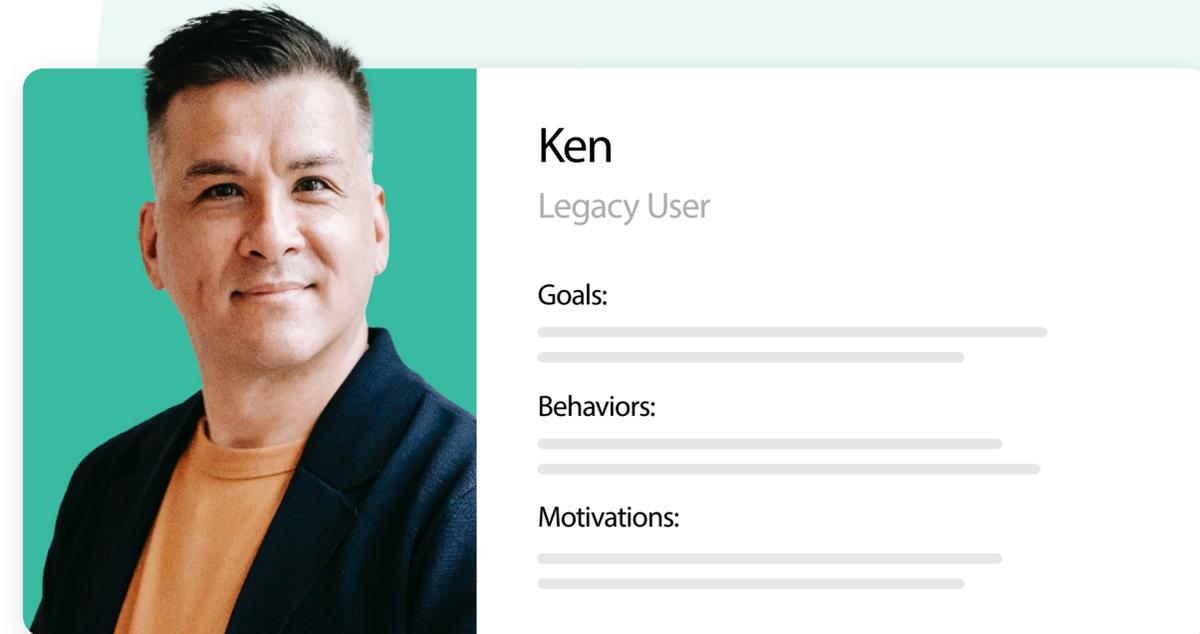


SECTION 7: WalkThroughs tips and tricks

1. Maintain relevance using segments

When delivering any message meant to convince or compel action, you must know your customers' personas, goals, behaviors, and motivations. You want to avoid generalizing your customer data and creating the same WalkThrough for everyone. Here are a few examples of how to target your WalkThroughs to put the user first.

- **Administrator user vs. end user:** Both roles need guidance, but the level of detail will differ. Consider their daily tasks, usage frequency, and KPIs to tailor your guides. For instance, an administrator likely needs additional instruction on how to configure permissions, reports, and integrations, as well as access user data and logs.
- **Trained user vs. untrained user:** For a user who attends a product training, you might create a simple three-step WalkThrough as a quick refresher. Whereas for a user who didn't attend the same training, you might create a WalkThrough with two to three times as many steps.

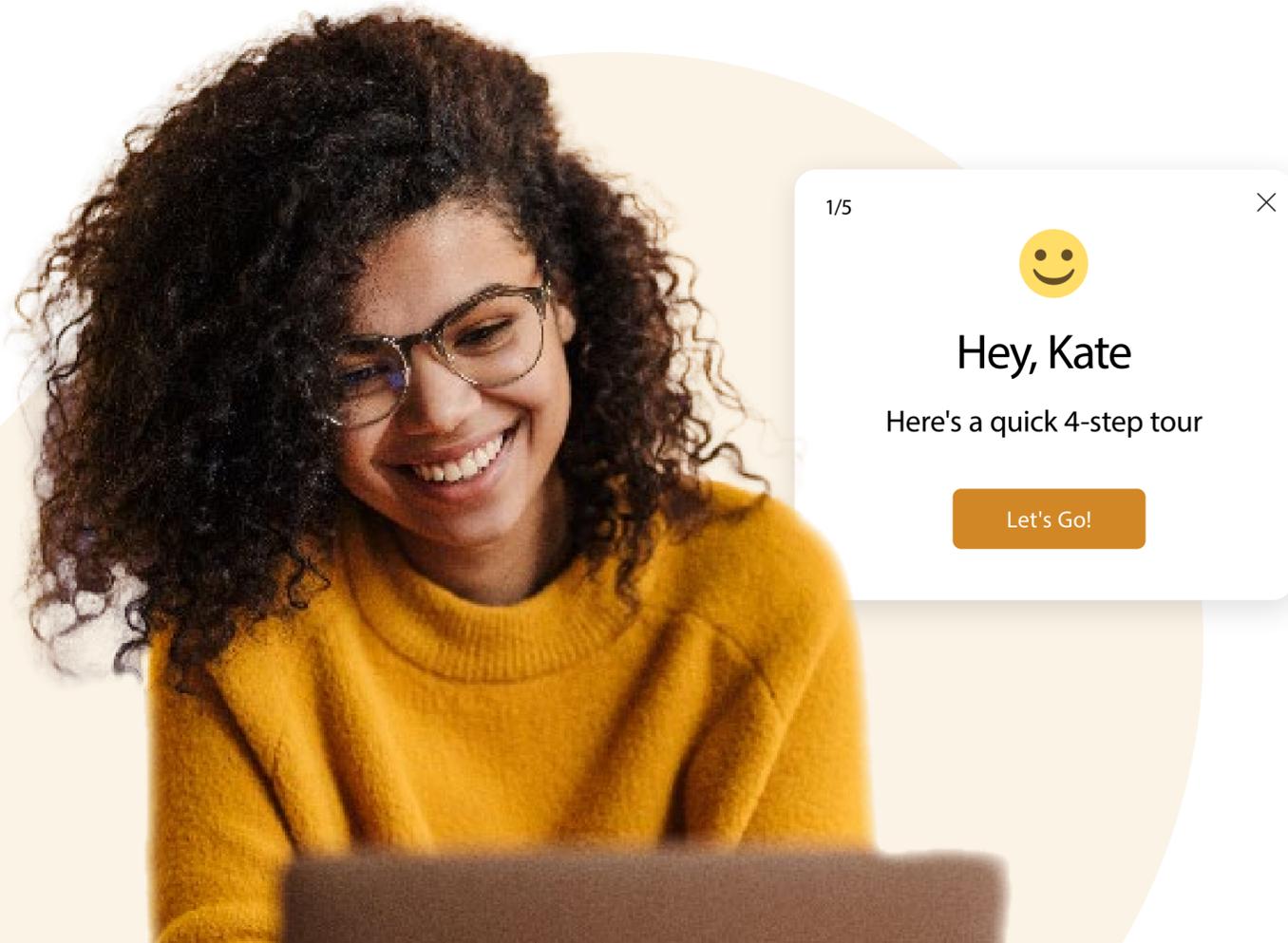


- **First-time user on a new product vs. legacy user on a new product:** If you've recently moved to a new version of your product or feature, you'll likely want to create a WalkThrough for users who are entirely new to your product and a WalkThrough for users who have experience with the prior version. For brand-new users, you want to start at the very first step in the process. For experienced users, adding a simple pop-up to remind them that the "Save" button moved from the top left to the bottom right would suffice.

SECTION 7: WalkThroughs tips and tricks

2. Ask WIIFM (what's in it for me?)

This is what your customers ask themselves every time they interact with your product. To engage your customer, you need to answer their foremost question: What do I get out of this? Focus on their motivations and use their knowledge gap to your advantage by positioning your WalkThrough as the bridge to take them from novice to expert. For example, let's say you had a platform with a blogging feature. When creating your WalkThrough for this feature, you'd want to position the blogging feature as key to becoming an influencer (the customer's underlying motivation and goal).



3. Walk, don't run

It's tempting to show a new user all the functionality that your product has to offer, but you need to teach them to walk before they can run. To increase the chances that your customer engages with and retains your message, follow these tips:

- **Aim for no more than four steps in your WalkThrough.** Note: This figure is meant to serve as a baseline since the number of steps in your WalkThrough will vary based on product complexity. Remember, you can invite your users to learn more by linking to relevant outside resources, such as a knowledge base, instead of cramming copy or adding extra steps.
- **In your first message, tell users the level of effort involved in completing the WalkThrough so they don't feel like they're aimlessly clicking through with no end in sight.** For example, you could describe your onboarding WalkThrough as a "quick 4-step tour."
- **Avoid making your WalkThrough a tour of hodgepodge features.** Guide users to achieve one goal to reach a faster Time to Value. Your user shouldn't feel like a ping-pong ball darting around your interface with scattered objectives.

SECTION 7: WalkThroughs tips and tricks

4. Add animation

If you can't easily explain a feature in a short, written description, add a GIF that shows the functionality in action to supplement your instruction. You can also add encouraging or celebratory GIFs to complement your message. For example, include a congratulatory GIF in the last step in an onboarding flow or in a new, long-awaited feature announcement.

5. Stay on brand

WalkThroughs live within your product so they should have the same look and feel as your brand. For onboarding WalkThroughs, this is likely the first interaction a user has with your product, so you want to make a good first impression.

When designing, use a bright background color to make your messages stand out and command attention. Avoid shades of the same color as they tend to blend together.

When writing, showcase your brand personality in copy (where appropriate) but not at the cost of concision and clarity.

6. Use first person

Use second person (you, your) in body copy, but use first person (me, my) in CTAs. Add merge fields, especially in your welcome message, to address your user by their first name or company. This small, personal touch grabs their attention.

7. Use action verbs

For your WalkThrough CTAs, instead of defaulting to "Next," use inspiring, conversational copy that encourages the user's progression and reinforces the action's outcome (WIIFM). For example, you could test "Awesome. Keep going!" "Show me." "Take the tour."

8. Don't undermine users' intelligence

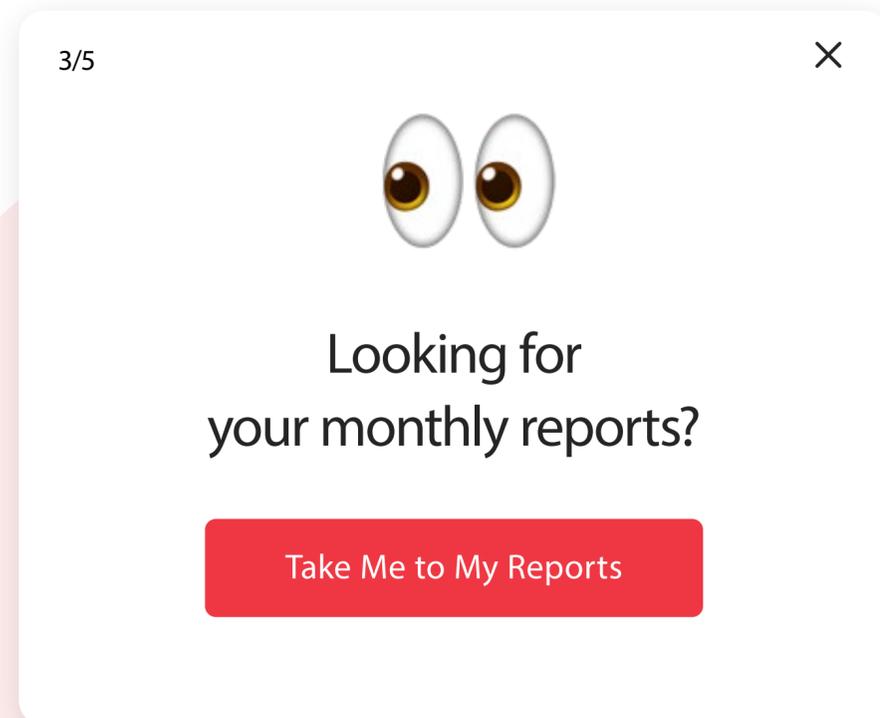
This goes back to knowing your audience and their technical adeptness. If your users are proficient in application basics, such as recognizing that a leftwards arrow (←) moves to a previous screen or an "X" exits a screen, then don't waste their time explaining functions they're already familiar with.

SECTION 7: WalkThroughs Tips and Tricks

9. Try time-based guides

Most WalkThroughs are triggered by a page view or feature click, but you can also add a conditional rule based on time parameters. This is helpful to guide users through features they don't use daily, but still need to access on a monthly or quarterly basis, such as creating a report.

Example: Show the "End of Month Reporting Automation" WalkThrough when a user signs in during the last week of each month.



10. Do the hard work

You're likely not going to nail your WalkThrough the first time – and that's to be expected! You're making educated guesses and using best practices to inform your execution, because you can't know what will work for your specific product and audience until you try it. The biggest disservice you can do to your WalkThroughs is setting and forgetting them. Adopting an iterative mindset is the only way you'll achieve an optimized user experience. Here are a few testing tips:

- **A/B test WalkThrough factors** such as length, color, images, videos, sequence, copy, screen placement, and timing.
- **Test your onboarding WalkThrough with new employees** who have a fresh, impartial opinion of your product. Once they gain adequate product knowledge, their objectiveness is compromised. You can also test with other internal departments that are infrequent product users.
- **Regularly review your WalkThrough analytics** to understand how customers engage with your touches and improve the effectiveness of each step.

WalkThroughs reduce adoption friction while empowering users to be self-sufficient learners as they discover the power of your product. With step-by-step guidance, WalkThroughs allow users to navigate your product with ease and stay focused on the features that will drive the most value.

Ready to guide your users to success?

Discover the power of WalkThroughs by seeing them in action with a live demo of ChurnZero. Learn how WalkThroughs work with other ChurnZero features such as Plays which drive continued automation following the WalkThrough steps to further your customer engagement.

[GET A DEMO](#)