

Playbook: Adopting Features

FOR YOUR
Mid/Low-Touch Customer

This is an example of an Adoption Play for a specific feature. This can prove helpful when a customer has told you they want to achieve an outcome but are not using those features that will get them there.



1

Identify Usage

Step: Task

Your customer has fallen into a Segment that indicates the customer is not using the capacity they need to in order to meet their goals. Investigate that usage to ensure is not a false-positive or something that you have already discussed with the customer as not being doable right now.



2

Reach Out

Step: Email

Do not send a generic email - even if you have low-touch customer. Make sure that you at least reference what you have personally noticed investigating their Account and why you feel it may not align with what they have expressed as being goals they have. Also express that you're concerned about making sure they maximize their investment.



3

Call the Customer

Step: Task

Give the customer a call and reference your email. Again, express the concern that you have for their existing investment. Set up a time to discuss this feature more in-depth and how it relates to their end-goals. If you can hop in this directly with the customer when you've got them on the phone and thinking about it - all the better.



4

Deliver Benefits + Next Steps

Step: Task

You've had a discussion with the customer about the benefits they're missing from their existing investment. Reference the top benefits to an organization with their goals using your recommended feature. Provide clear steps with links to resources they can use to easily adopt the feature. Provide videos whenever possible.



5

Reiterate In-App

Step: In-App

You have already discussed with the customer on the phone and via email the benefits of using the feature they should be adopting to meet their goals. Deliver this same information inside the application the next time they log in a day or so after your email above goes to them. This helps reiterate the importance and resources available.



6

Reminder Email

Step: Email

Ping the customer inside the application for another touch point while they're active in your solution. Reiterate the resources available to them from the previous email and take this opportunity to lightly remind them that you have expectations before your next interaction.



7

Continue the Trend

Step: Email

At this point, the customer should have at least attempted to use the feature that will help them reach their goals. If not, you can continue this trend alternating between emails and in-app announcements until the customer ends up utilizing the specific feature. If they don't use, you can also consider attempting to send them through this process again in another 30 days.

Final Thoughts

- Use your Exit Criteria to avoid sending irrelevant communications
- Provide them with clear next steps to begin getting value quickly
- Include videos and knowledge base articles whenever possible
- Don't hesitate to lean into automation here
- Use the phone touch point to prove to them how important this is

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