



**How to Use
Walkthroughs to
Empower your CS
teams**

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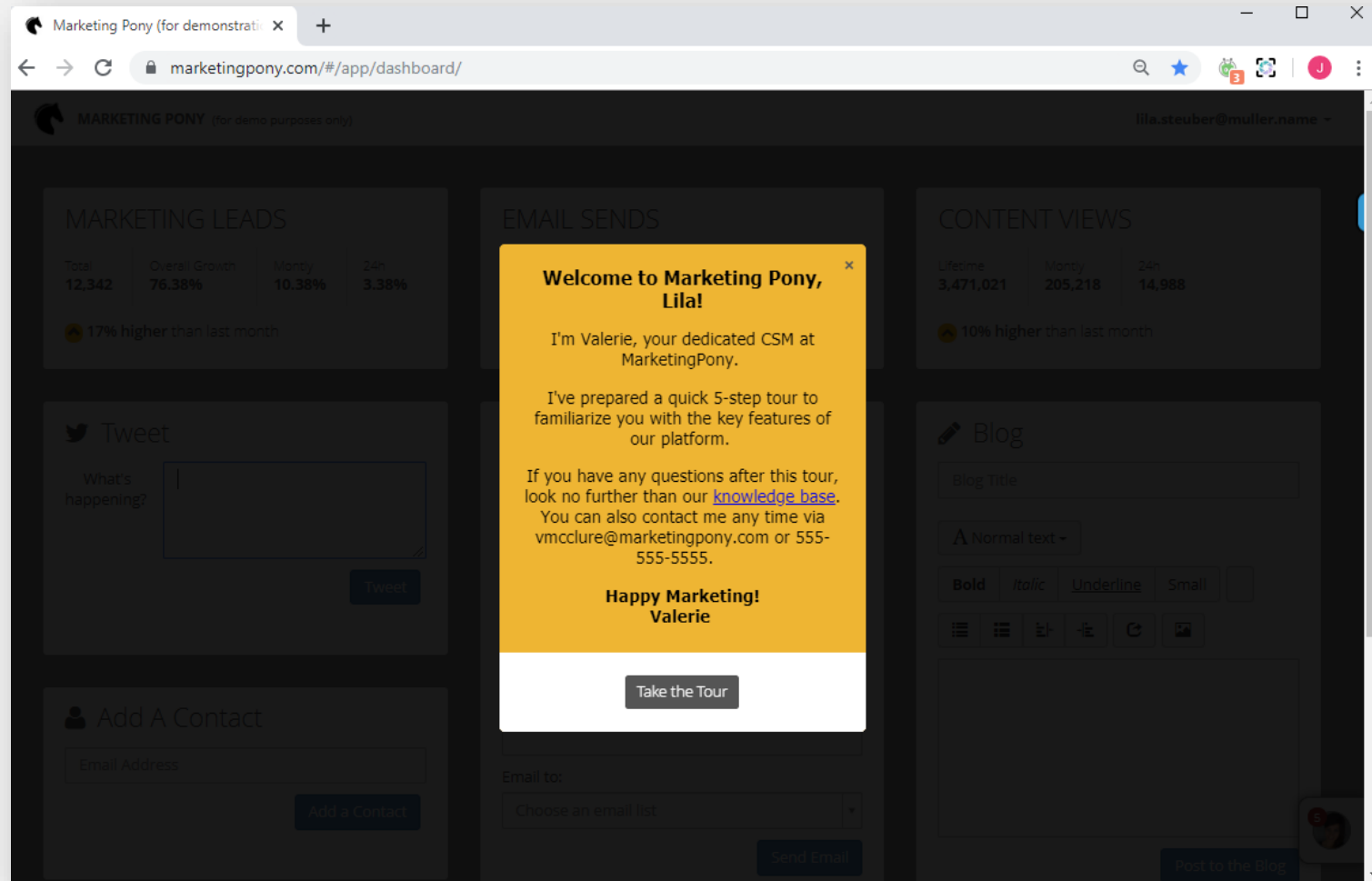


Agenda

- What are in-app walkthroughs?
- How humans learn
- Segmenting your customer base for a personalized experience
- The first 90 days
- Report and Improve

What are WalkThroughs?

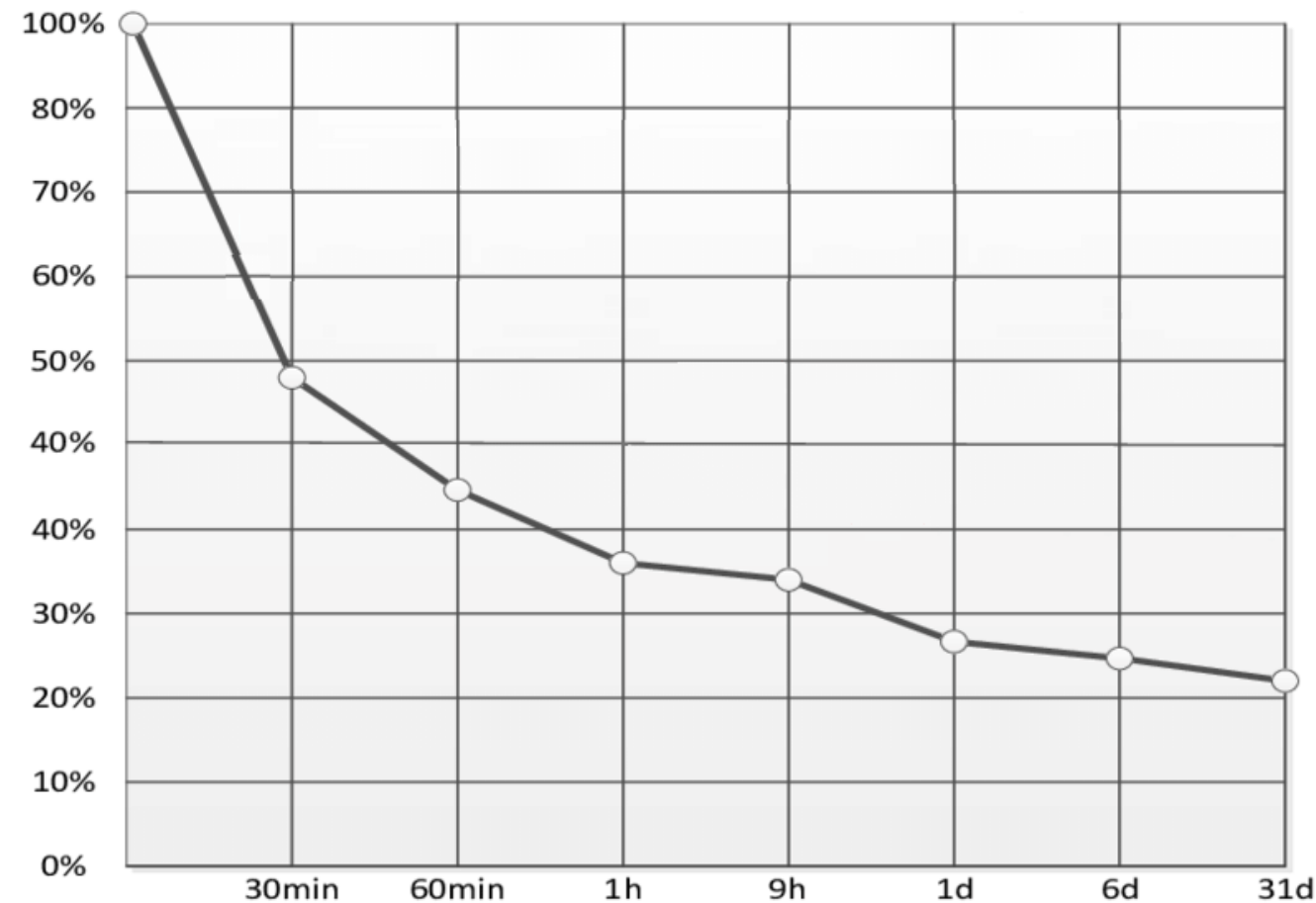
In short, walkthroughs are **multi-step popups directly inside of your application** designed to drive some sort of specific action or behavior



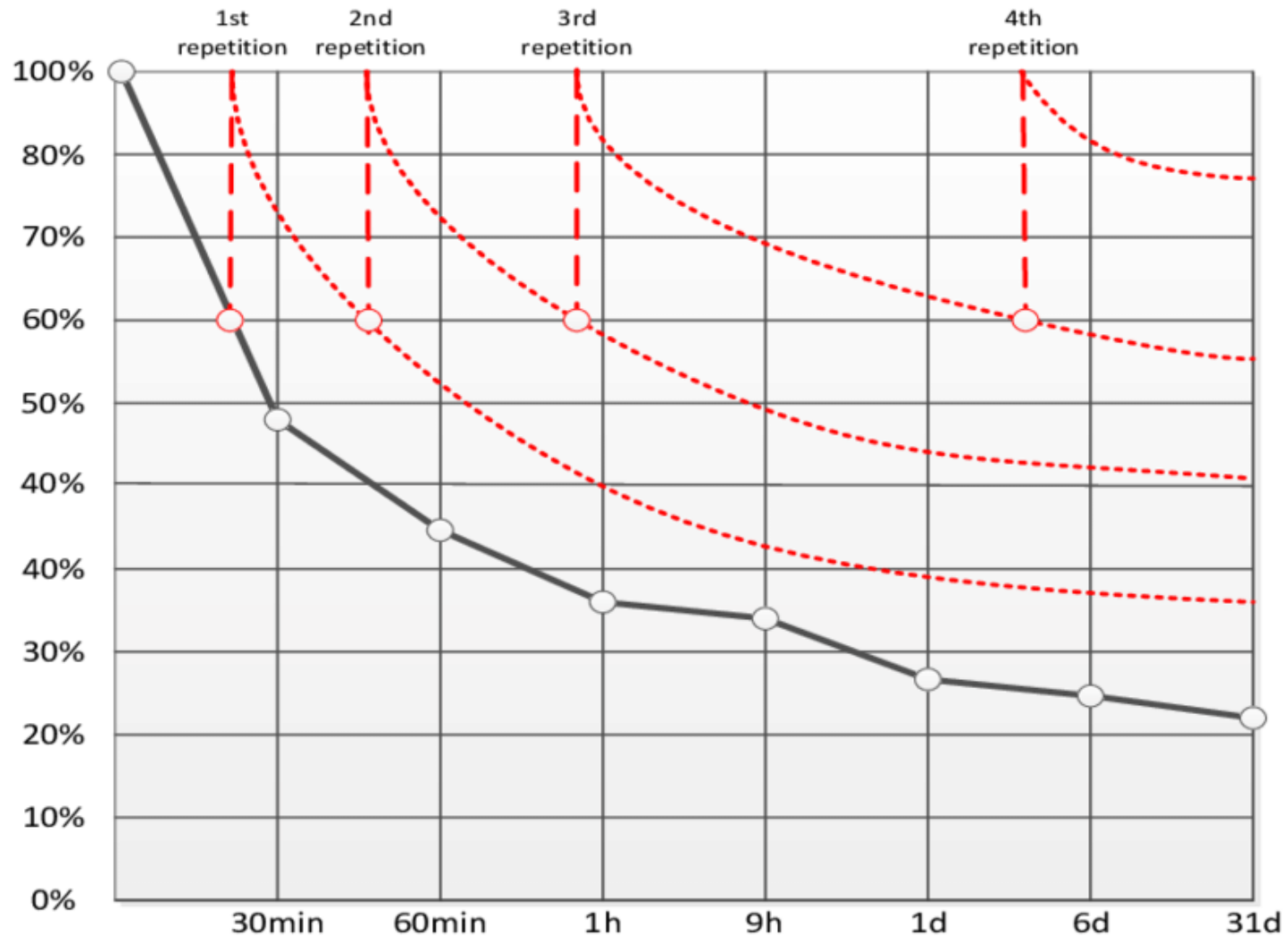
How Humans Learn & Why Should We Care?

The Ebbinghaus Forgetting Curve

Explains the decrease in ability for the brain to retain memory over time



Repetition is Key!



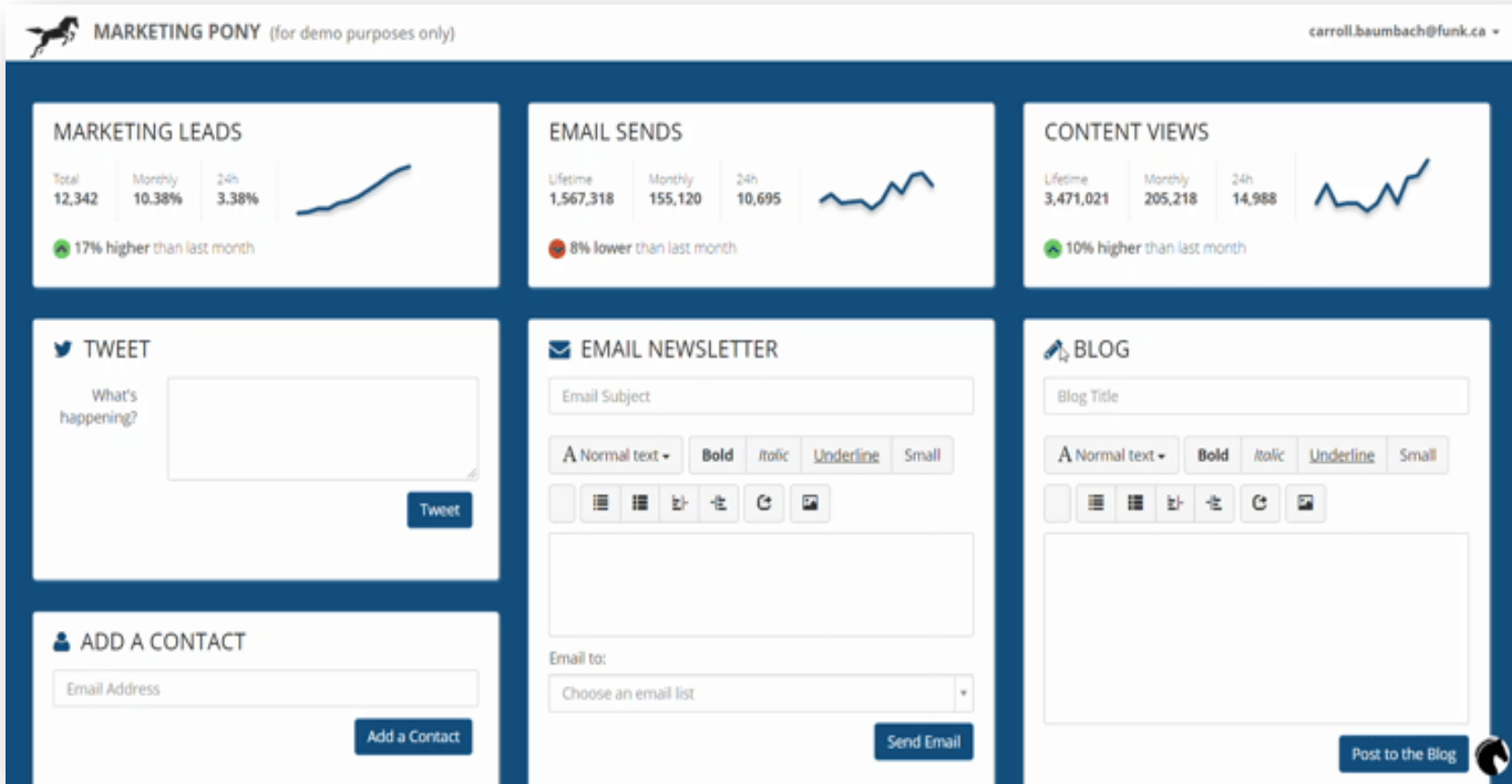
POLL

Does your application/product utilize in-application walkthroughs?

Yes

No

Segmenting Your Customer Base at Scale



- New users vs. Existing Users
- Admins vs. Non-Admins
- Which product purchased
- Low TCV vs. High TCV
- Users who have used one feature vs. Those who haven't
- Self service customers vs. Dedicated CSM

The First 90 days : Reducing TTV

Why?

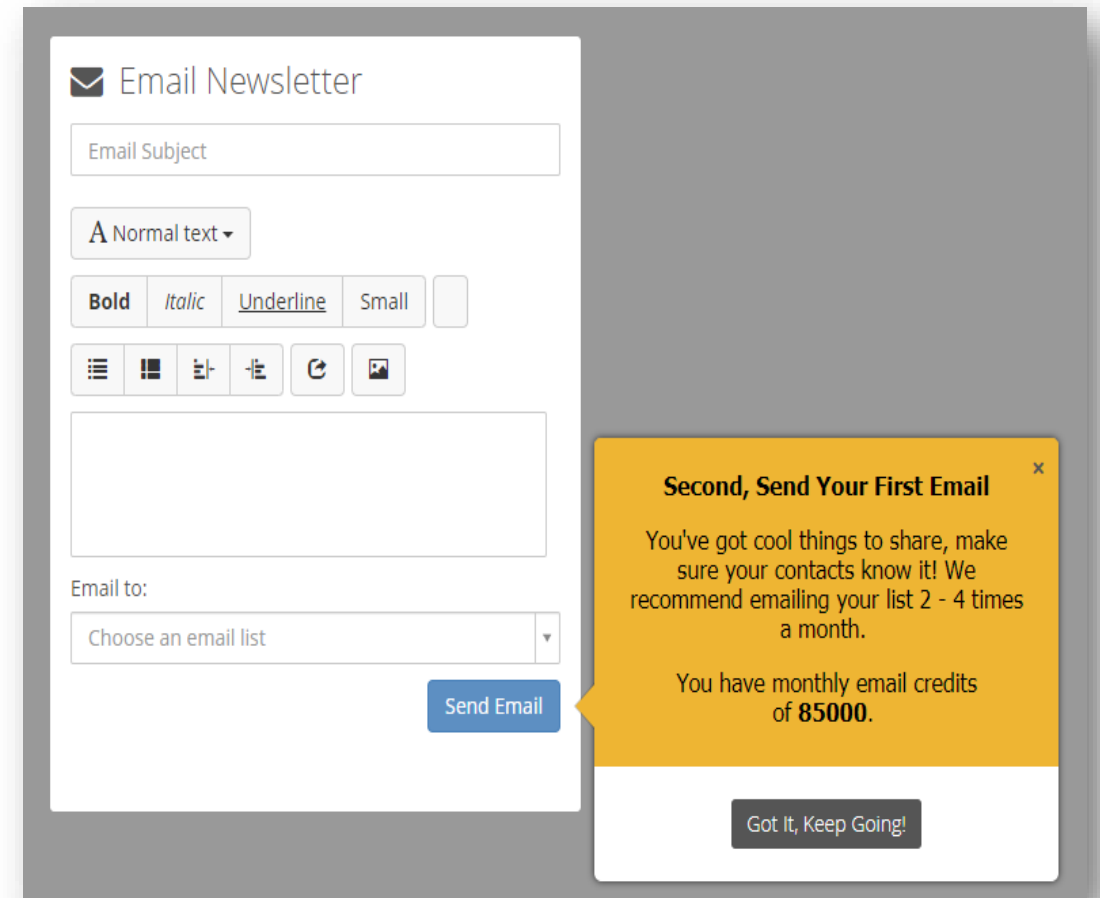
In-app walkthroughs & messages boost user engagement by 3x – When they're in the application, it's when they're most engaged

In-app has a 2x higher click-through rate than email

Based on the micro-segmentation of the customer, identify core features they should be using, how often, and how to measure success

If users aren't achieving key success metrics, trigger personalized in-app walkthroughs

How?



The image shows a screenshot of an email newsletter creation interface. The interface includes a title "Email Newsletter", a text input field for "Email Subject", a text format dropdown menu set to "Normal text", and a toolbar with options for Bold, Italic, Underline, and Small. Below the toolbar is a large text area for the newsletter content. At the bottom, there is an "Email to:" label, a dropdown menu for "Choose an email list", and a blue "Send Email" button. A yellow notification box with a close button (X) is overlaid on the right side of the interface. The notification text reads: "Second, Send Your First Email", "You've got cool things to share, make sure your contacts know it! We recommend emailing your list 2 - 4 times a month.", and "You have monthly email credits of 85000." At the bottom of the notification box is a dark grey button that says "Got It, Keep Going!".

POLL

Who oversees in-app content in your org?

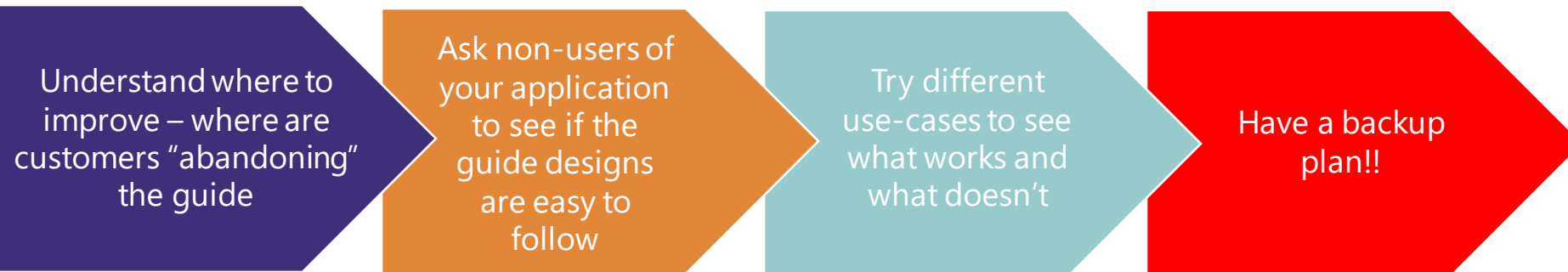
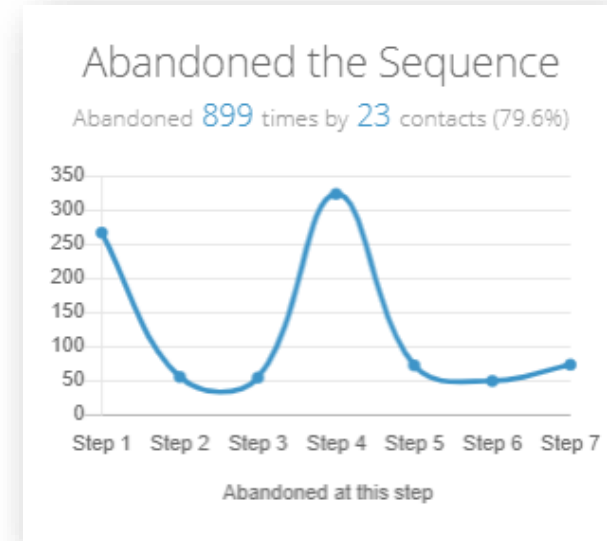
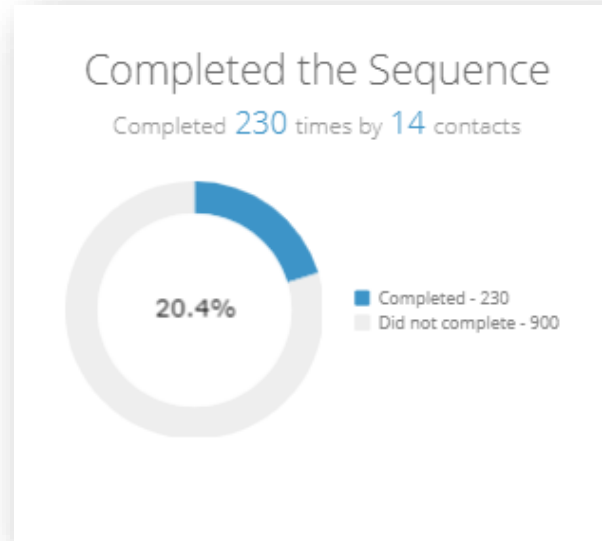
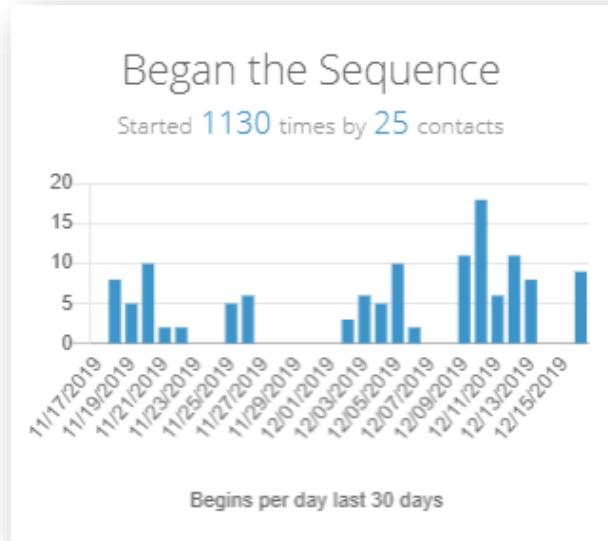
Product

CS

Both

Unsure

Report & Improve



Other Use-Cases of In-App Targeting

- Preemptively address most commonly submitted tickets
- For consumption models – How to add credits or tokens
- How to pay their bill
- New feature announcements
- Contact their CSM regarding important account issues
- Event or webinar signup
- Access to content or knowledgebase
- Self-service onboardings
- Upsell opportunities
- Escalations

1. Remember your users are most engaged when they're already in your app – take advantage
2. Don't treat all users the same
3. Be deliberate with your walkthroughs and aim for a specific outcome
4. Design, test and repeat

Takeaways

Thank You



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IMPACT WEBINAR

A CSM's Introduction to ChurnZero

Tuesday, January 26th | 3:00PM ET



Chase Tinkham
Customer Success Manager at ChurnZero