From Zero to Hero

Your Minimum Viable Customer Messaging Setup in One Day or Less

@uibreakfast @Userlistio #MicroConf

How do you welcome your new users?

Reach out to them manually 👋

Send them a simple welcome email/sequence

Send some behavior-based automated campaigns

Do nothing & hope for the best

Let's set your hands free today!

1. Make a plan
2. Start tracking user behavior
3. Set up your segments
4. Set up your campaigns

Step 1

Make a plan

Three essential campaigns

Basic Onboarding

Trial Expiring

Advanced Features

What behavior do you need to track? Events & properties

account_created

trial_ends_at

billing_state (trialing, active, cancelled)

Key feature flags (e.g. projects, files, sending_domains, etc)

See the forest through the trees

What does the path to success look like?

What can you measure?

What things cause the most trouble?

Where can you offer real help?

Key feature flags we use at Userlist

tracked_users

active_campaigns

sending_domains

postal_address

Step 2

Start tracking user behavior

Pick a tool & start sending user data

Intercom

Customer.io

Drip

ConvertKit

Userlist

Step 3

Set up your segments

Four essential segments

Trialing Users

Trial Ending Soon

Paying Users

Cancelled Users

Step 4

Set up your campaigns

Basic Onboarding

Message Subject / When to send	Opened	Clicked
🚀 Let's get this started Send immediately	71%	18%
📆 Book your personal onboarding call Send after 1 day	60%	12%
📝 Resources to fuel your inspiration Send after 1 day	52%	14%
Can we help? Send after 7 days to certain users only	36%	14%
Now, the creative part... Send after 2 days to certain users only	80%	0%

Work through key feature flags, and skip messages if a feature has been already adopted.

Trial Expiring

{% if user.tracked_users == 0 %}

Your Userlist.io trial ends on {{user.trial_ends_at | date: "%A, %b %d"}}. Sadly, we don't see any user data in your account yet — so please let us know if you'd like to extend your trial for another two weeks.

If we don't hear back from you anytime soon, we'll go ahead and charge your card on {{user.next_billing_at | date: "%A, %b %d"}}. If you'd like to cancel, you can do this anytime in Settings.

{% else %}

Looks like your Userlist experience has been going well and you've already started tracking your user behavior.

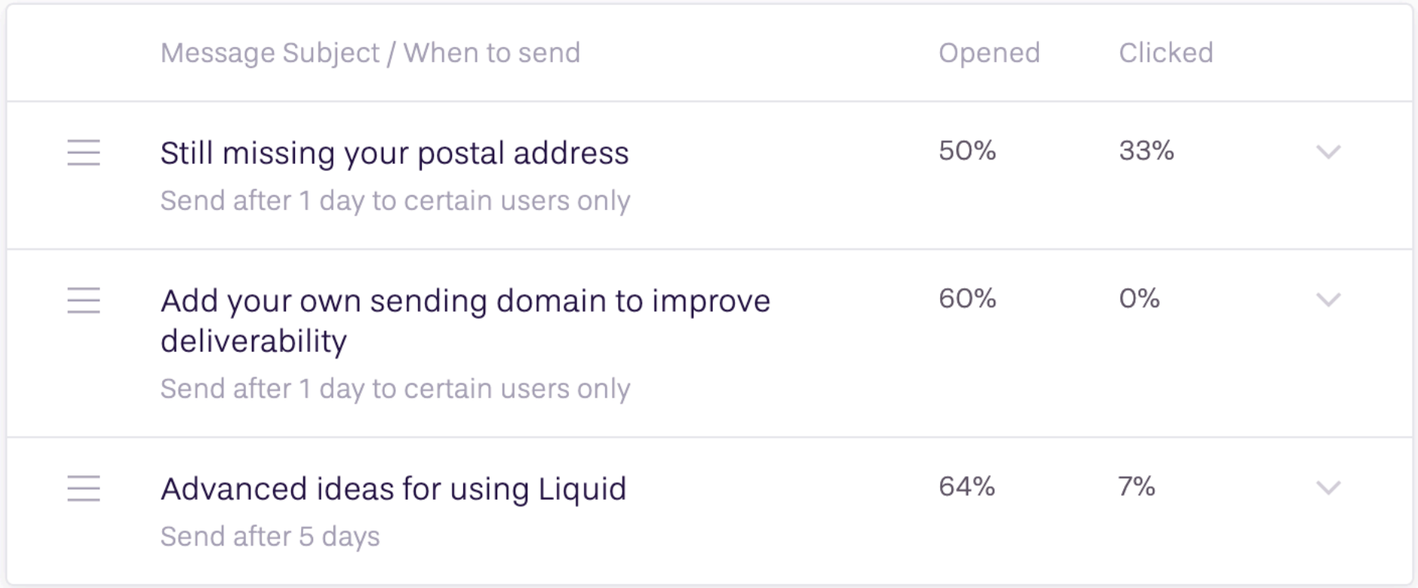
This is a friendly notification that we'll start charging your card on {{user.trial_ends_at | date: "%A, %b %d"}}, on a plan matching your {{user.tracked_users | default: "number of"}} users (see our pricing page for reference).

If you'd like to cancel, you can do this anytime in Settings.

{% endif %}

Use Liquid conditions to customize message text based on adoption status.

Advanced Features



Work through remaining feature flags, skipping irrelevant messages. Share other tips and resources.

How can you help them at each point?

Send them to a knowledge base article

Link to a video tutorial or a webinar

Provide templates, case studies, etc

Offer a Calendly link

Writing tips

Write like you would personally

Keep it short

One thing per email OR list a number of resources

Inspire

Be polite but confident

Aim for autopilot

Giant trees grow out of very tiny seeds.

Gambia Proverb

There are no gardening mistakes, only experiments.

Janet Kilburn Phillips

All gardeners know better than other gardeners.

Chinese Proverb

userlist.io/mceu2019

Download the slides and enjoy the 30% attendee discount during your first 3 months at Userlist.