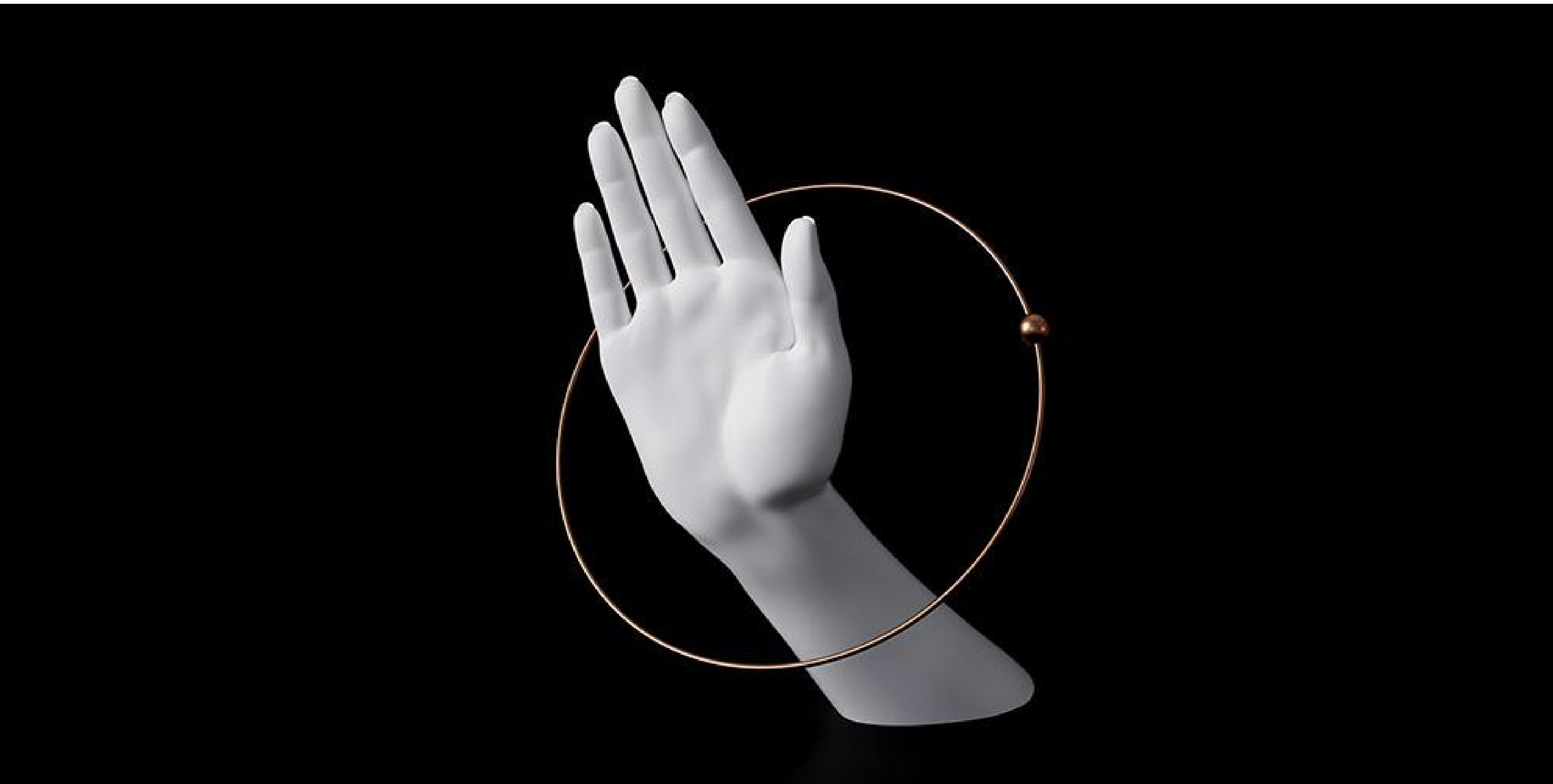
https://userlist.com/

# Email Marketing Blueprint for Products with a Free Trial

Looking for the best way to onboard and convert your trials? This blueprint explores lifecycle marketing for product-led SaaS companies running on a free trial model.



# Free trials: leveraging the power of product-led growth

Free trial products have great leverage for lifecycle email automation:

- You have a high volume of frictionless, self-serve trials
- You have a clear timeline for converting them into a paying customer
- Any improvement in conversion rate has a significant impact on your revenue

In this guide, we'll dissect the email marketing strategy for your product on a free trial. We'll show you how exactly to set up your customer data, segments, and behavior-based campaigns.

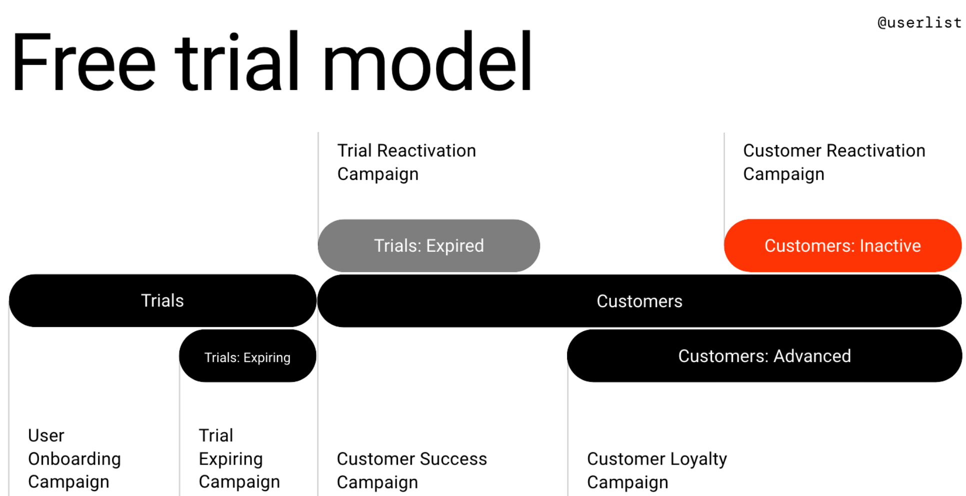
For more context on SaaS email marketing automation, please first read this guide on SaaS email marketing strategy.

## Is your free trial limited by time or credits?

In this guide we're talking about **time-limited free trials.** If your trial is based on credits or usage, check out the funnel model blueprint for businesses that run on credits.

# Meet the customer journey map

Segments and email campaigns go hand in hand. That's why you should map your customer journey and figure out your segments first.




Here are the lifecycle segments:

- *Trials* — users who are currently on a free trial
- *Trials: Expiring* — trials with the approaching expiration date (which can change, that's why it's important to have this segment separately)
- *Trials: Expired* — trials that didn't convert to a paying customer
- *Customers* — users with a paid billing plan
- *Customers: Advanced* — paying users with success metrics above a certain threshold
- *Customers: Inactive* — paying users who activated but haven't displayed any activity lately, e.g. during the last 60 days
- *Customers: Failed Payments* — paying users with billing issues

Once a user joins a segment, you will send them a corresponding email campaign (and likely stop their previous campaign):

- *User Onboarding Campaign* — help new users start using your product and receive value from it
- *Trial Expiring Campaign* — create urgency to convert them to a paid plan. It's important to keep this campaign separate, because the trial can be extended
- *Trial Reactivation Campaign* — convince the expired trials to stay and convert to paid (otherwise they're simply part of your marketing email list as a product-qualified lead)
- *Customer Success Campaign* — once they become a paying customer, continue their education and improve customer success
- *Customer Loyalty Campaign* — build relationships with your advanced customers
- *Customer Reactivation Campaign* — win back inactive paying users to prevent churn
- *Failed Payment Recovery Campaign* — recover failed payments

This model is simple but effective. It helps you establish lifecycle "breakpoints" and trigger relevant emails throughout the lifecycle journey.

## Two common mistakes with free trials

Email marketers make these two mistakes with free trials products:

1. **Including trial expiry emails in the onboarding campaign.** Trials can be extended, so this campaign should be separated from the user onboarding.
2. **Giving up on expired trials.** It's common to give up on these users altogether. Meanwhile, they're your product-qualified leads, and you can nurture them for 3-6 months with a longer reactivation campaign.

# What data do you need to track?

First, let's see what customer data you need to track.

You'll be sending these properties and events from your application's back end to your email marketing platform, thus continuously updating each customer profile.

## Properties

- General billing state, which will help you identify free and paying customers: *billing_state* (trialing, active, past_due, cancelled)
- Other billing-related properties: *plan, next_billing_at, billing_interval* (month, year)
- Trial expiry date: *trial_ends_at*
- Custom properties for your success metrics: e.g. *projects* (how many projects they have inside your tool) or *photos*
- Custom properties that reflect their setup: e.g. *integration_connected* (true, false)

## Events

- A custom event that reflects their primary activity, so that you can identify active and inactive customers based on their timeline: e.g. *project_created*, *photo_uploaded*

See our [planning worksheets]() and [spreadsheets]() for the full list of suggested events and properties.

## Properties

**Properties (user data)** represent the current state of the user — you can't see what happened in the past. Properties can typically be found in the user profile, and are the most reliable way to store important information about the user. **For account-level data,** see bonus section in the end of this PDF.

- [x] email
- [ ] first_name
- [ ] last_name
- [ ] company
- [ ] account_role (owner, manager, guest, etc)
- [ ] signed_up_at
- [ ] trial_ends_at
- [ ] plan
- [ ] monthly_spend
- [ ] billing_state (trial, active, past_due, cancelled)
- [ ] next_billing_at
- [ ] billing_interval (month, year)

| Property name | Description and possible values |
|---|---|
| | |
| | |
| | |
| | |

# How to organize your segments

Here's how your segment conditions will look:

- Trials — *billing_state = trialing*
- Trials: Expiring — *billing_state = trialing and trial_ends_at is less than 3 days from now*
- Trials: Expired — *billing_state <> active or past_due* and *trial_ends_at is before today*
- Customers — *billing_state = active or past_due*
- Customers: Advanced — *billing_state = active or past_due* and *projects > 10* (or any other value that makes sense for your business)
- Customers: Active — *has performed project_created > 0 times in the last 60 days*
- Customers: Inactive — *has performed project_created = 0 times in the last 60 days*
- Customers: Failed Payments — *billing_state = past_due*

# How to set up your campaigns

See this guide on campaign triggers to see why you need customer data to trigger your email campaigns.

## User Onboarding Campaign

This is the most important campaign, as your goal is to take your customer from zero to one in their product usage.

Similar to other onboarding campaigns, we're mixing up general educational messages with specific feature check-ins. You only send such check-ins if they're not using a certain feature yet.

**Campaign trigger:** user joins segment Trials.

**Exit condition:** user joins segment Customers.

**Example messages:**

1. Welcome to our product
2. How to set up your integration — only send if integration_completed = false
3. Let's set up your first product — only send if products = 0
4. Inspiring case study
5. Top tips on being great at X
6. How to optimize your X process
7. Book a call with our tech team — only send if integration_completed = false

These messages are usually sent 1-3 days apart from each other.

# Trial Expiring Campaign

This is a short campaign that tells the user about their expiring trial, and encourages them to upgrade (if they haven't added a credit card yet).

This campaign needs to be repeatable, so that the user can received it more than once (e.g. if their trial is extended).

**Campaign trigger:** user joins segment Trials: Expiring.

**Exit condition:** user joins segment Customers.

**Example messages:**

1. Your trial expires in 3 days
2. Your trial expires tomorrow, please add your card to continue using the product
3. Your trial has just expired, here's what's happening to your account and your data

## Trial Reactivation Campaign

This is a long campaign that maintains a relationship with your past trials and encourages them to purchase a paid plan.

Mix-and-match 75% soft nudges (like inspiring case studies or testimonials) with 25% hard-sell emails. Hard-sells can include a promo code or another way to stimulate a purchase.

*"Jab, Jab, Jab, Right Hook,"* as Gary V. says in his book.

**Campaign trigger:** user joins segment Trials: Expiring.

**Exit condition:** user joins segment Customers.

**Example messages:**

1. Inspiring case study
2. Helpful article
3. Helpful article
4. Sales nudge: highlight the benefits of your paid subscription
5. Video tutorial
6. Helpful article
7. Helpful article
8. Sales nudge: offer a promocode
9. …

The trial reactivation campaign can be rather long: you can have 6-12 months worth of nudges. Typical sending cadence is 14-28 days between messages.

## Customer Success Campaign

With this campaign, your goal is to educate your paying customers, tell them about advanced features, and make them more successful. This includes sharing useful content, checking in on advanced features, etc.

**Campaign trigger:** user joins segment Customers.

**Example messages:**

1. Did you know that you can use [feature A] — only send if feature_a = 0
2. Share a useful piece of content
3. Did you know how [feature B] can help you improve your […] — only send if feature_b = 0
4. Share a useful piece of content
5. Let's book a strategy call to make the most out of your account
6. Share a useful piece of content
7. …

Good sending cadence is 7-14 days between messages. This campaign can be rather long, based on what you need to tell your paying customers to help them become successful.

## Customer Loyalty Campaign

With this campaign, your goal is to build a relationship with paying customers who have been using your product a lot. This includes sharing useful content, checking in on advanced features, offering upsells, asking for feedback, etc.

**Campaign trigger:** user joins segment Customers: Advanced.

**Example messages:**

1. Congrats for making great progress. Would you like to schedule a customer success call?
2. Here's a promocode to share with your friend
3. Can you please share a testimonial?
4. Fill out our 5-min feedback survey
5. Would you like a free shirt? — invite them to fill out a form with their postal address & size information
6. Have you heard of our referral program?

These messages are almost like personal requests, so you'll be sending them 1-2 months apart from each other.

**Orchestrate by days of the week.** You don't need to stop the Customer Success Campaign to start sending loyalty emails, so make sure these two campaigns are spaced out on different days of the week. E.g. you only send success tips on Wednesdays, and loyalty emails on Sundays.

## Reactivation Campaign

Your goal with this campaign is to bring back inactive users.

Yes, most likely they have their own business reasons for being inactive — so you shouldn't overestimate the power of emails. However, don't leave this opportunity on the table.

Use the exit condition to make sure reactivated users stop receiving your nudges.

**Campaign trigger:** user joins segment Customers: Inactive.

**Exit condition:** user leaves segment Customers: Inactive.

**Example messages:**

1. Top 5 tips for being great at X
2. Inspiring case study
3. Top 3 industry challenges & our solutions to them
4. We haven't heard from you lately. Is there anything we can help you with? Book a call with our success team

Space these emails 7-14 days apart.

You want to keep the language positive, and focus on content that makes them successful. It's okay to say things like "we've noticed that you haven't been active", but don't overdo it.

# When do I send my broadcasts?

With lifecycle campaigns running, you still want to make space for your **broadcasts** — newsletters, holiday deals, or new feature announcements.

We recommend keeping certain weekdays free of lifecycle campaigns. For example, you limit your lifecycle emails to send on Mondays, Wednesdays, Thursdays, and Fridays, and reserve Tuesdays for your broadcasts.

P.S. Don't underestimate the power of Saturdays and Sundays. These are great days for sending entertaining content or customer loyalty emails.

# Let's get started

Hope this guide brings more clarity for your free trial SaaS model. Once again, your goal is to bring value to the right users at the right time. As simple as that.

Here are our guides worth exploring:

- How to Trigger a Behavior-based Email Campaign
- Email Marketing for B2C SaaS
- One Email List, Multiple Products

# Book your strategy call

To get advice for your specific situation, you're welcome to book a free strategy call with us. We can discuss any aspect of your email marketing automation, from the integration to customer data to actual campaigns.