Breyta

SaaS Free Trial Best Practices to Increase Conversions

[Checklist]

Map Out Your Free Trial User Journey

- ◯ Build personas and define your user's goals
- ◯ Start with the end goal and work backwards to map out the journey
- ◯ List your customer events e.g. completing a tutorial
- ◯ Identify your most successful users and reverse engineer their steps
- ◯ List your key conversion signals e.g. signing up for a demo call

Improve Your Onboarding Experience

- ◯ Find your user "aha" moment
- ◯ Remove points of friction to reduce time-to-value
- ◯ Promote your stickiest features
- ◯ Use heatmaps to discover critical actions e.g. where users exit
- ◯ Decide if you need no-touch, low-touch or a high-touch onboarding process
- ◯ Use qualitative and quantitative data to measure, iterate, and improve

Add Limitations to Your Free Trial

- ◯ Add a time limit e.g. 14-days which is long enough for users to see value
- ◯ Limit the number of actions a user can perform
- ◯ Restrict access to specific features
- ◯ Add watermarks on exported content

Send Out an NPS Survey

- ○ Create micro surveys for your customers and churned users
- ○ Use a 0-10 ranking question
- ○ Follow up with an open-ended question
- ○ Analyse the results to find your best features and weak points

Create an Interactive Educational Experience

- ○ Free live webinars
- ○ Interactive onboarding quizzes
- ○ Online course or certification
- ○ An educational game that unlocks restricted features
- ○ Interactive product walk-throughs
- ○ One-on-one calls
- ○ Checklist with a progress bar

Segment Your Email Campaigns

- ○ Collect emails with an email marketing tool
- ○ Segment users into three groups inactive, semi-active, or active
- ○ Create a drip campaign for each segment
- ○ Create a trial expiry email campaign

Ask For The Sale At The Right Time

- ○ Ask for the sale when the user achieves a goal