ortto

Ready, set, *grow*.

A step-by-step guide to mastering product-led growth

Welcome

Product-led growth has become a mainstay for SaaS, but companies in the early stages are more likely to flounder than flourish if they don't take the time to build a strong foundation.

This 90-page, proven step-by-step guide to PLG is a realistic, no-bullsh*t approach that will help set your product up for organic, long-term growth. Throughout this eBook, we will answer all your burning PLG questions, including:

- Can product-led and sales-led growth co-exist?
- Should my business have a freemium or free trial model?
- How do I identify, track and optimize towards product-qualifying actions?
- How do I get started with PLG?
- How can I fast-track my customer's 'aha moment'?
- What is the flywheel and should it replace my funnel?
- How do I set goals, track progress, and keep my team accountable?
- How do I reduce churn?

Plus, we'll go deep on a few of the PLG-adjacent growth strategies including growth loops and community-led growth.

Ready, set, grow.

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About Ortto

Ortto is the unified customer journey solution for online businesses.

We're the beating heart of your SaaS business, working intelligently in the background to help you grow. As a SaaS company, we understand the importance of unified data, getting a single view of your product user, and the ability to track the metrics that matter most — like sign-ups, MRR, engagement, and subscriptions.

We brought the customer data platform, marketing automation, and sophisticated reporting and analytics together in one, powerful platform to help every SaaS professional achieve their goals. Track product actions and leverage them for growth, improve your conversion rates and predict customer behavior with Ortto AI, and automate repetitive tasks to make your PLG strategy scalable and sustainable.

At Ortto we believe our power is in the connections we forge. So we've built a platform that allows you to connect with your customers with meaning and intention.

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Table of Contents

Product-led growth explained

Chapter 1: What is product-led growth?

Unlike sales-led growth or marketing-led growth, product-led growth relies on the product itself as the main vehicle to growing and retaining your customer base.

We're not suggesting that the sales or marketing teams will disappear. Marketing activities will drive people to sign up to your product's freemium or free trial offering, while Sales will step in to help drive MRR on product-qualified leads, negotiate terms with enterprise-level customers, or strategize and identify new business opportunities.

SaaS superstars like Slack, Dropbox, Calendly, Shopify, Figma and Canva are all leveraging product-led growth with huge success and if you've signed up to any of them, it's likely you've witnessed how powerful this strategy can be.

Why now is the time for product-led growth

Product-led growth is hardly a new concept, but with each passing year it becomes more pertinent. SaaS businesses are facing a range of challenges, including increasing customer acquisition costs, a highly-competitive space (and growing), and consumers who have become used to trying before they buy and expect to experience the value of your product... and fast.

PLG solves a number of the challenges that businesses face today — and, even more importantly, it safeguards them for the challenges we expect they'll face in the future.

If either or both of these needs speak to you, it might be time to consider a product-led strategy:

1.You need to find the goldilocks of growth

SaaS businesses and startups are under a lot of pressure to grow, and fast. But not too fast. Or our sales and support teams will crash and burn.

We need the goldilocks of growth - rapid, impressive, but sustainable.

Here's where product-led sales comes in. In an episode of Growth Masters, Wes Bush, the Founder and CEO of ProductLed gives the example of Zoom who scaled from 10 million to 200 million daily meeting participants in just three months early in the COVID-19 pandemic.

If the company was operating on a sales-led model, Bush estimates that this staggering growth would have required 131,944 salespeople (or, more likely, an extremely burnt-out sales team and a bunch of unhappy leads who never convert).

When the product itself handles initial on-boarding through self-education and video demos, a company is able to experience rapid growth sustainably, just like Zoom did.

There's another side to this coin. A product-led growth strategy widens your net, allowing you to more easily capture and convert leads from around the world, without the need to immediately implement a sales or customer service team.

2.You need to overcome rising CAC

Customer acquisition costs (CAC) have been a major problem for every business out there. Advertising on platforms like Facebook and Google is more expensive and often less effective than ever before, there's incredible competition out there, with less ability to cut through and in many cases, customers are spending less meaning businesses need more of them.

With PLG, cost per acquisition starts to reduce. There are a number of reasons this is the case, including:

1

Sales cycles are faster

When the majority of prospects onboard themselves, sales cycle bottlenecks are removed.

2

Profit margins improve

With less need for sales and support teams, and more resources building a product that sells itself, profit margins improve.

3

A better user experience

Self-serve help documents, chatbots and content ensure that customers are able to find answers when they need them. In the early stages, this could be the difference between new customers sticking around and straying elsewhere.

4

Product quality improves

When your entire company is focused on the product, magic happens. And a better product results in easier customer acquisition — simple as that.

5

Generate more leads for less

The reduced barrier to entry with freemium or a free trial means acquisition efforts generate a larger quantity of leads that can be targeted them with cost-effective marketing like email content.

6

Cast a wider net

When you can capture leads from anywhere, in any size company, your net is wider and more conversions happen naturally.

Determining whether PLG is the right growth strategy for your product

If you're a SaaS company with a remarkable product, it's likely that you'll find some benefit from understanding how product-led growth works and implementing some of the strategies, if not all. As Product-Led Growth collective points out, the first step to becoming product-led is ensuring you have a remarkable product that truly delivers on its promise.

And so the question is less 'Is PLG right for my product' and more 'How big of a transition am I looking at here?' or 'How 'all-in' should I go?'

To find answer, start by asking your customer-facing teams a few questions:

- When customers reach a salesperson, are they asking for a free trial before they commit?

- Do they seem disengaged with the demo and itching to get their hands on the product?

- Is it difficult to convince customers of the value of the product before they experience it for themselves?

- Is onboarding and setup simple? If not, could it be made simpler?

- Does your product offer a unique or best-in-class solution to a problem?

- How often do your customer success team need to step in to help customers through the onboarding process?

- How many customer service queries could be answered through online content, an AI-driven chatbot, or a simple email?

After asking these questions, you should start to have a good idea of how difficult a transition to product-led growth will be and how 'all in' you should go.

If you know PLG is the right solution for you, but you're concerned your customers will miss the person-to-person interaction, consider this: Every day consumers are signing up for products like Spotify and Netflix in the millions without a salesperson's help. In the B2B world, even complicated products like Asana and Monday are adopted in major companies with little to no intervention from a sales team.

In fact, in a Forrester article titled Death of a (B2B) Salesman, it was reported that nearly 75% of B2B buyers said that buying from a website is more convenient than buying from a sales representative. And that was back in 2015.

We've already reached the tipping point where consumers and businesses expect to be able to 'try before they buy' — PLG is how you turn that 'try' into an efficient, effective, churn-busting sales tool.

In the next chapter, we'll look at how many leading SaaS companies are using product-led growth strategies alongside sales-led growth to ease the transition, service different types of organizations or individuals, and offer a best-in-class customer experience.

Chapter 2: Product-led sales

Some of the most famous SaaS companies started their journey with zero sales representatives, relying entirely on a product-led growth strategy to increase their customer base and grow their revenue.

And, for a long time, this strategy was successful, resulting in supercharged growth, a loyal base of customers and advocates, and a product that truly delivers a world-class experience.

But today, many of these companies have now added a sales team. This begs the question — in the product-led vs sales-led growth debate, which strategy really delivers the growth gains SaaS businesses are aiming for?

Product-led vs. sales-led growth at a glance

In a product-led growth strategy, the product itself is the main vehicle for growth and retention. Every department in the business, including marketing, customer service, and content will be optimizing campaigns and activities towards specific product actions that are proven to bring the customer closer to conversion.

- A product-led growth strategy relies on the organization having either a free trial or freemium product available. Customers will sign up on their own and, guided by tools like a customer onboarding experience, resources hub, automated marketing messages, chatbots, or a community of practice, will discover the value of your product in their organization and decide to become a paying customer.
- A sales-led growth strategy relies on a sales team to go out and find leads, service product demo requests, and contract partners.

In between these two extremes is a different approach that is rapidly becoming the norm — product-led sales, a blended model that brings the best of both worlds into one powerful strategy for growth.

Benefits of a product-led sales strategy

Put yourself in your buyer's shoes and it quickly becomes clear how a show and tell strategy like product-led sales can be beneficial. Customers are able to get into your product and experience it for themselves, and benefit from a little hand-holding from a sales team when it comes time to expand usage or negotiate terms on enterprise-level plans.

As much as this is a customer-centric strategy, there are numerous benefits to SaaS companies that implement it.

- **Lowered CAC**

We went into detail about why CAC decreases with a product-led growth approach, but it really can't be said enough. By lowering the barrier to entry for customers, allowing sales teams to stay lean, creating a product that sells itself, and ultimately running a more efficient business, CAC starts to reduce.

According to ProfitWell, CACs have increased by over 55% in the last five years, meaning this alone can do a world of good for your business.

- **Higher LTV with revenue diversity**

By implementing both product-led strategies and a sales team, your SaaS business will be better equipped to bring in those high LTV enterprise-level customers, while maintaining the revenue diversity that comes with a product-led model.

In a traditional sales-led operation, it was common for a small number of big customers to be the main drivers of your Annual Recurring Revenue, which made losing just one of them incredibly risky. When sales teams are able to focus on these big fish while the product itself sells to the smaller fish, you'll have a larger pool of customers and the idea of losing just one won't keep you up at night.

- **Build a better product**

When the product itself is doing the selling, customer feedback is taken on board quickly and innovation becomes top priority for the entire business. Every team is focused on improving the product, bringing different perspectives and solutions to ultimately build a product that is world-class.

As SaaS explodes and competition grows fiercer by the minute, a great product is absolutely paramount to success.

- **Self-discovery sells**

No one knows your customer's business like they do, so even the best sales team could easily skip over a use case, feature, or benefit of the product that the customer sees instantly. This kind of self-discovery is powerful — when we feel as though we've reached our own 'aha' moment, we are more attached to the outcome and willing to buy-in.

This reduces friction in the sales cycle, saves your team valuable time, and is more likely to create customers who are both loyalists and advocates.

For these reasons and more, product-led sales is becoming the dominant strategy for SaaS businesses. In fact, data from PeerSignal shows that, of 473 SaaS companies documented, 387 are utilizing product-led sales in their go-to-market strategy, 81 product-led growth, and just 5 sales-led growth.

How to add sales if you are product-led

Many of the most successful SaaS companies that started out with a product-led strategy added a sales function once they reached a certain point of growth or identified a specific need in the market. Data from PeerSignal shows just how much the size of that sales team varies.

Sales team size

According to PeerSignal, the sales team size (as a percentage of total workforce) of leading SaaS companies is:
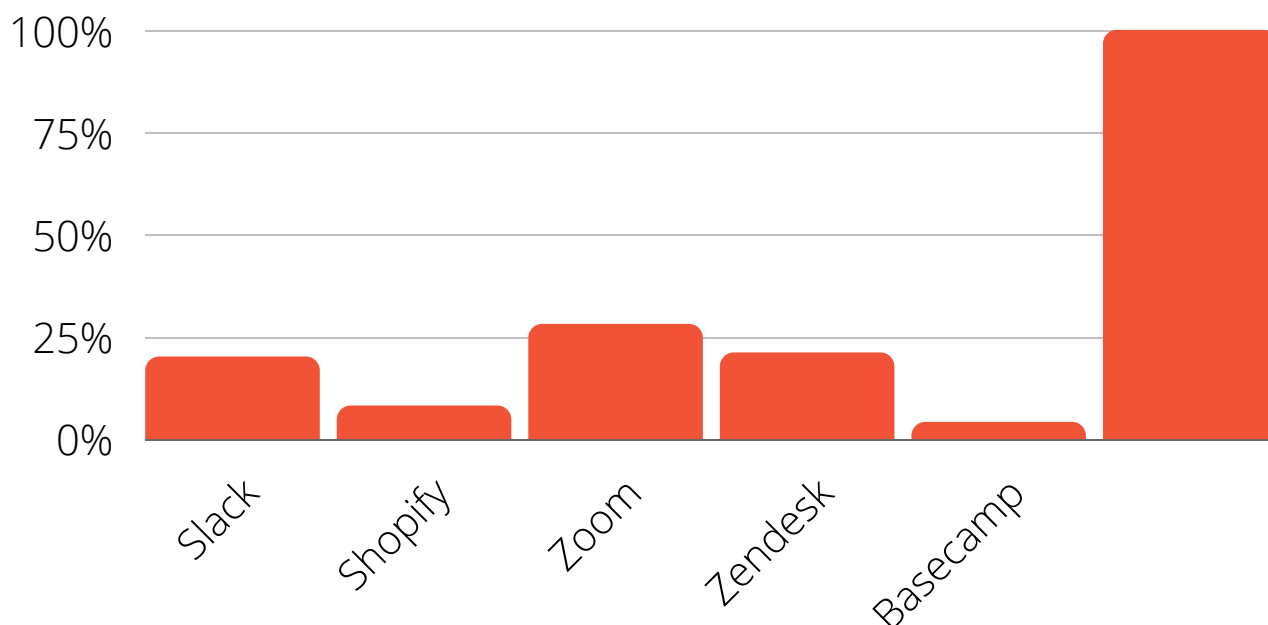
- Slack, a company that has its roots in product-led growth, now has a sales team which makes up 20% of its workforce.

- Shopify, a product that is as popular with mom and pop ecomm stores as it is with major retailers, has just 8% of their 12,500+ strong team in sales.

- Zoom, a product that experienced pandemic-fueled growth to such a degree that a sales team alone could never have sustained it, has 28% of their 7,500+ team dedicated to sales.

- Zendesk, a company that got to 5,000 customers without a sales team, brought on a sales team (21% of total workforce) after realizing that, as their product suite grew, new and existing customers needed a more hands-on approach to ensure they were getting the most out of the Zendesk offering.

- Basecamp got to 3 million customers without a sales team, and now has a small sales department that makes up 4% of their employees.

In all of these examples, the product has experienced natural virality with customers who sign up for a freemium plan or free trial quickly experiencing the value, deciding to pay for the product, and recommending it to friends and colleagues. But at a certain scale, a sales organization can help drive the transformation from everyday users choosing to use the product within their team, to a company choosing to use the product across every department. It's these deals that drive LTV up, and help reduce churn.

If you're a product-led organization looking to add a sales function, there are three types of leads your sales team can focus on.

1. Product-qualified leads (expansion)

It's likely you're already tracking product-qualifying actions (more on those later) in your CDP, and have a number of product-qualified leads for a new sales team to pursue.

This is the low-hanging fruit your sales team can focus on initially to increase MRR on your biggest clients. Plus, sales, customer service, marketing, and content teams can use these splashy clients for case studies and testimonials, further driving growth.

2. Marketing-led leads (conversion)

Content initiatives, paid media, events, and other marketing activities are likely generating leads that haven't actually gotten in and started using your product. This could be because of a general hesitation around trying something new or because they're an enterprise client with specific needs.

Sales can reactivate these leads, answering questions, negotiating contracts, or helping them with onboarding.

3. Outbound leads (generation)

Most SaaS companies have a list of dream customers — these could be the companies that you were thinking of when you built the product or they could be a set of influential companies in a specific industry that you are trying to break into (like ecommerce or agencies).

In either case, bringing just one of these dream companies on board could unlock a whole new world of growth. Narrow this list down to a manageable number, and get sales, product, marketing, and customer service teams together to strategize around how to win them.

How to integrate product-led strategies when you're sales-led

This one is a little trickier to manage, but can be very worthwhile. As Alastair Simpson, Head of Strategy at Coassemble, shared in our 2022 SaaS Trends article, "By opening your product up to the market you can supercharge your acquisition funnel and see volumes of leads that a sales-led motion just can't produce. By leveraging rich product data, sales organizations can prioritize whom their sales representatives reach out to and when."

If you're in a similar position, start by following these three steps:

1.Consider pricing

Some more traditional sales-led companies do not reveal pricing until after initial product discovery calls and demonstrations take place, but product-led initiatives really do require some amount of pricing transparency. After all, if you're jumping into an opt-out free trial, you'll need to disclose the amount the customer will expect to pay before they'll be willing to commit.

Consider how shifting to a product-led model will impact your tiered plans. If free trials or freemium plans are too much of a jump, look at how you could start with a product tour or pre-recorded demos that allow customers to see your product in action without the help of a salesperson. This could be step one to unlocking a more product-led approach.
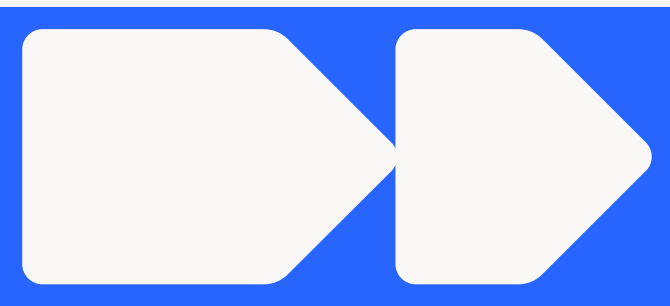
2. Unify your data

When operating in a product-led model, a single source of customer truth is essential. You will need to bring data from every department together alongside product data to essentially get a look at the customer journey and pinpoint the actions that make up a product-qualified lead.

Ortto has been designed to do just this — we use a collection of no-code integrations to unlock data from marketing, finance, support, sales, and product and collect it into a single customer profile. That way, you can discover the actions important to your business and get a complete view of the customer journey.

3. Make product part of everyone's life

Product-led growth is a company-wide strategy. From marketing to customer service to sales, everyone needs to be thinking about how the product can be improved upon to increase leads and MRR.

Marketing will become focused on getting the product in the hands of the end-user and ensuring the experience of the product delivers on marketing messages. Sales will share intel with product teams, taking customer feedback on board to continually improve the product. Plus they'll use new and improved features to reignite old leads and grow existing customers.

Like any strategy shift, there will likely be some road bumps along the way. But it will all be worth it in a year or two when your product is selling itself, your CAC has reduced, your MRR has increased, your product is famous, and your sales team is able to focus on the big fish.

4. Establish a system for lead routing and nurturing

One of the stickier steps in your journey to product-led sales is establishing a system for routing your leads into the right nurture flow. It will take some time for you to build a well-oiled machine, but with your data unified in a CDP like Ortto, you will quickly learn which leads should be routed into which funnel. There are several data points that will play into your lead scoring and routine system:

1. The size of the organization (startups are more likely to self-serve, whereas enterprise-level organizations are more likely to require sales-assist)
2. The role of the decision-maker (startup founders are less likely to engage with a Sales team. If finance has the final say, they'll want to negotiate)
3. Product price and complexity (the higher the price and more complicated the product, the more likely Sales will need to get involved)
4. Technographic data (if your new lead has a highly-custom tech stack, for example, they may need support for any integrations or workflows)
5. Product actions and events (including product-qualifying actions which will be unique to your product - more on that later)

We'll get into how this can be done in section two: A step-by-step guide to getting started with product-led growth.

A step-by-step approach to getting started with product-led growth

Chapter 3: The PLG tech stack

Before you get started with a product-led growth strategy, you'll need to set up a tech stack that can enable your teams to drive real change across the business. There's no shortage of tools out there, and it can be easy to sign up for everything only to wind up with more data silos and confusion than you had before.

Remember - your tech stack should make your life easier, not harder. This guide is designed to help you operationalize data, keep your team on track to reach their goals, personalize communications with your customers at scale, and automate busy work so you can focus on growth.

We've narrowed the many tools down into eight essential categories: CDP, marketing automation, payment platform, analytics and reporting, in-app guidance tools, data enrichment, customer support, and content and creative.

CRM

What is it: A customer relationship management solution will help you keep track of your customers and potential customers, tracking information throughout their lifecycle including contact information, service issues, communications with sales or support, and more alongside sales pipeline information.

Why you need it: A CRM ensures all of your customer information and sales prospects are kept in one spot, giving you clear visibility into every opportunity or lead and ensuring that your sales and marketing teams can get a view of a customer's previous history with you, accurately forecast sales, and automate administrative tasks like data entry and lead routing.

CRM checklist

- [ ] Does this CRM solution have the ability to grow in the long-term?
- [ ] Do businesses similar to mine find value in this CRM?
- [ ] Is the CRM easy for anyone to use?
- [ ] What support is available throughout implementation?
- [ ] Does this CRM integrate with my chosen CDP?
- [ ] Where will I go for support?
- [ ] Does the CRM automate tasks like lead routine?
- [ ] How is performance tracked and will I have a clear view of my pipeline?

Experts recommend: Salesforce is one of the most widely used and trusted customer relationship management platforms out there. It is a cloud-based tool, meaning employees who are remote or traveling to meetings can easily access the information they need and input data on the go.

Pipedrive is another cloud-based CRM known for being easy to use and is a more affordable option for smaller businesses as it offers feature add-ons that can be tapped as your business grows.

Both Salesforce and Pipedrive have built-in integrations with Ortto, meaning you can quickly and easily connect your customer and sales data to website activity, product data, and marketing activity to unlock more opportunities.

CDP

What is it: Software that collects and organizes customer data from a range of different touch points on their digital journey. The data can be further segmented in an unlimited number of ways, and these segments can be used to develop personalized marketing campaigns.

Why do I need it: A CDP is essential for gathering, consolidating, and operationalizing data. In a product-led growth framework, it is crucial that you both understand and can activate across the entire customer journey. A CDP brings all of your data together to give you a single view of your customer, so you can track important customer activities, attribute revenue and other actions to journeys, campaigns, or messages, and view customer engagement.

CDP checklist

- [ ] Does this CDP integrate with all the tools I need to operate my PLG strategy?
- [ ] Can I easily activate campaigns and attribute revenue across channels?
- [ ] Does this vendor have easy-to-read analytics and reporting tools?
- [ ] Does my team need extensive technical experience to use this CDP?
- [ ] What security measures does this vendor have in place?
- [ ] What segmentation capabilities does this platform offer?
- [ ] Does this CDP allow me to track custom activities and use them to trigger marketing messages?

Experts recommend: Ortto is the customer data platform that was designed for SaaS. Unify your data, track the most important activities, target the right audience with powerful segmentation capabilities, and rest assured that your customer's data will be secure with two-factor authentication, SOC2 compliance, and enforcement of GSPR and CCPA as a standard.

Ortto offers simple, but powerful, integrations with all of the tools you'll need to operate your PLG strategy, as well as a custom API that can be utilised for custom-built or other tools you use. With event-based data alongside customer data, you can answer questions like 'What is the impact of customer support on CLV?' or 'Which actions lead to MRR?
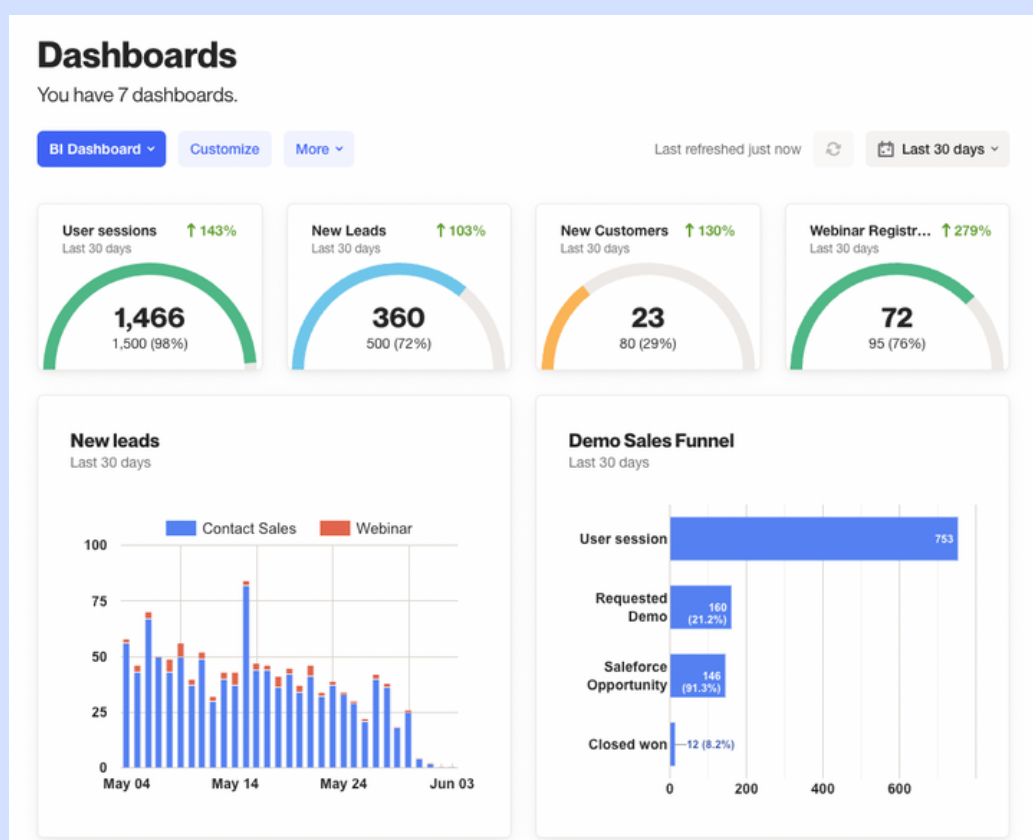
Subscription management platform

What is it: A payment platform purpose-built for recurring revenue companies.

Why do I need it: In a PLG strategy, pricing tiers are critical to growth (more on that later) and you will likely wind up with customers moving from one plan to another on a subscription basis. A subscription management platform will help you automate subscriptions at scale. When integrated into your CDP, you'll be able to see trial, subscription, charge and invoice data alongside product actions, marketing data, and customer service data.

With this, you can answer complex questions like 'which UTM campaign led to the most trials?' or 'which product activity led them to upgrade?' with just a few clicks. You'll also be able to send automated messages when a subscription is coming up for renewal, or automate Slack and email notifications to get your sales team involved.

Subscription management platform checklist

☐ Does this platform allow for flexible billing logic?
☐ Is this a no-code tool or will I need to call my dev?
☐ Does this platform integrate well with the rest of my tech stack?
☐ Have other SaaS PLG companies used this tool for payments?
☐ Does this tool have purpose-built features for recurring revenue?
☐ What can I automate with this tool?

Experts recommend: Recurly is a purpose-built subscription management and recurring billing platform that many SaaS PLG companies, including Ortto, Sprout Social, and Sling use. Ortto integrates with Recurly in just a few minutes.

Stripe has a range of offerings, including a purpose-built solution for subscriptions. SaaS companies like Slack and Atlassian use Stripe for payments and subscriptions. The Stripe integration with Ortto is simple to set up and will allow you to unlock your data and craft highly personalized messages across the customer journey.

Marketing automation

What is it: A marketing automation tool allows you to automate omnichannel marketing messages across the entire customer journey.

Why do I need it: No matter what kind of online business you're running, marketing automation is essential to ensuring you can communicate with customers at scale.

In a PLG strategy, your marketing automation tool should allow you to send omnichannel marketing messages across the entire customer journey, with activity-based marketing capabilities to ensure self-serve customers are sent the right content at the right time. This will ensure you are able to onboard customers, nudge them towards their product-qualifying action and enter them into an expansion journey when they've reached PQL status.

A good marketing automation platform will also have built-in personalization capabilities, a simple but flexible email builder, SMS capabilities, A/B testing enabled, and robust reporting capabilities.

Marketing automation platform checklist

- ☐ Does the platform allow for automated omnichannel messaging?
- ☐ Can I visualize the customer journey and activate across it?
- ☐ Is activity-based marketing possible?
- ☐ Can I track custom activities?
- ☐ Do the segmentation capabilities allow me to cut across different types of
- ☐ data including product activity?
- ☐ What kind of integrations are available?
- ☐ How much technical experience will I need?
- ☐ How difficult is it to set up A/B testing?
- ☐ Does the platform have built-in artificial intelligence?
- ☐ How easy is it for my team to design and send an email?
- ☐ What personalization features exist within the platform?

Experts recommend: Ortto combines marketing automation with your CDP to ensure that you have a single view of your customer and can send marketing messages across the entire journey.

Event-based journeys can be built in minutes to onboard new users, expand key accounts, intervene when customers are at-risk to churn and create surprise-and-delight experiences for your advocates.

> *"We use Ortto to automate the content funnel, lead nurturing (after gated content/webinar or to keep in touch with "not now" prospects...) and to manage email communications to all our contacts in the CRM.*
>
> *It is also useful for customer success and product to automate onboarding email sequence and trigger tailored emails based on specific behavior."*
>
> Andy M, Head of Marketing, validated G2 review

Bonus tool: Zapier is a must-have tool for automating work across 4,000+ apps. It connects your apps and allows you to set up automated workflows using triggers or 'zaps'.

With simple 'this then that' logic, connecting tools to ensure teams or individuals are notified about key actions (like new leads), email attachments are saved to appropriate folders, or emails are sent when forms are completed. There's really no end to the automations you can build with Zapier.

Data enrichment

What is it: A data enrichment tool enriches your first-party company and individual data by updating information, adding new data points, or completing records. The software itself collects, sorts and verifies millions of data points across hundreds of public and private data sources to enrich your records.

Why do I need it: Data enrichment tools are mostly important to B2B SaaS companies, as they allow you to keep accurate company and individual level data on things like company size, valuation, and employee movements. It's incredibly useful for keeping track of your customers in real time, and ensuring that every message is sent with full context. There are other ways of enriching data, including surveys sent through your marketing automation platform, but a data enrichment tool operates in real-time automatically, saving you time while ensuring that records are kept up-to-date.

Data enrichment checklist

☐ Does the platform include the data attributes I need to complete records?
☐ Can I easily and quickly integrate the platform with my CRM and CDP?
☐ Where is the platform sourcing its data from?
☐ What is the response time on queries?
☐ How often does the tool update its databases?

Experts recommend: Clearbit is a best-in-class tool for targeted B2B marketing and is used by companies like Intercom, Asana and Hubspot. It scans more than 250 sources including websites, public records, legal filings and social media networks, and refreshes data every 30 days.

Zoominfo boasts customers like Google, snowflake, and T Mobile, and is one of the leaders in the space. They offer comprehensive B2B intelligence, giving you access to information like job responsibilities, work experience, education, social media profile links, and more. Company insights will give you a view of department org charts so you can identify the users and buyers in the organization and target the right people with the right message.

Product experience tools

What is it: In-app modals, pop-ups, checklists, hotspots, surveys, and tooltips that help onboard new users or guide existing users to try out new features.

Why do I need it: This one is really more of a nice-to-have than a need-to-have, but it really is nice to have. A product experience tool will allow you to create customer journeys with pop-up messages that guide new or existing customers to take specific actions in your app.

For example, let's say you've figured out your product qualifying actions include Slack integration, setting up a project, and inviting three teammates to that project. You could set up a flow that uses pop-ups, tooltips and checklists that guide the new customer to take those three actions, setting them up to reach their 'aha moment' in record speed.

- [ ] Are the popups, tooltips, or checklists each to build and design?
- [ ] How does segmentation and targeting work?
- [ ] Can I target users based on custom activities?
- [ ] How does the tool measure success?
- [ ] What kind of content can I add to the experience (videos, images, gifs)?
- [ ] How long will it take me to set up and publish a journey?

Experts recommend: Appcues is a market leader in the space, offering a wide range of onboarding and product experience tools including modals, checklists, tooltips, slideouts, hotspots, a resource center, and NPS. It's easy to implement and offers a range of patterns that can be designed and edited using the Appcues Builder Google Chrome Extension.

Ortto includes in-app pop-ups, surveys, forms, notifications and video to help guide customers towards specific actions. If you're not ready to invest in a product experience tool, these features alongside email marketing automation will go a long way to ensure your onboarding and engagement journeys generate the results you're looking for.

Analytics and reporting

What is it: Product analytics and business intelligence that allows you to visualize your data and draw insights from it. Some SaaS businesses use two tools for this — one to track product analytics like user actions and another to track business intelligence, but that can become quite challenging and expensive, and will often create more data silos throughout the organization.

Why do I need it: What is not measured can never be improved. These words ring especially true in a PLG SaaS organization where the need to understand how users behave within your product, and how those behaviors or actions impact how that customer grows (or doesn't grow) is absolutely critical to success. Ultimately, you want a tool that will organizationalize your data, helping your entire team — from product to marketing to sales and beyond — make the best use of the data you have available. Keep that accessibility in mind as you explore tools.

- [ ] Does the tool allow me to unify all my data sources in one place?
- [ ] Does the tool allow me to slice through different data types (including product actions and events)?
- [ ] How easy is it to build a dynamic dashboard?
- [ ] Will my team need technical experience or in-depth training to build and read dashboards and reports?
- [ ] Will I need to call on a data scientist to get the data I need?
- [ ] Can I easily visualize and share data when I need to?
- [ ] How does revenue attribution work?
- [ ] Do other SaaS businesses use the tool to measure metrics like MRR? Can I track progress towards my KPIs and goals?

Experts recommend: Ortto offers product analytics and business intelligence in the one tool, giving you a complete picture that you can easily draw insights from. Our advanced reporting tools are incredibly intuitive and easy to use, meaning anyone, from any department, can build and make use of dashboards and reports. We have built-in revenue attribution to ensure every activity is tracked and measured, as well as nine different visualization options to help you create impressive reports to share with investors or other stakeholders.

Customer support

What is it: Customer support software may include AI-powered chatbots, tools for tracking customer conversations and measuring customer satisfaction, and collaboration tools that help customer service agents respond faster with prepared answers.

Why do I need it: It may seem counterintuitive that you would need customer support software when the product is doing a lot of the hand-holding for you. But, in fact, a great customer support tool will play a huge role in your product led growth strategy, helping your customers on their journey with tools like chatbots and ensuring all customer enquiries and correspondence are captured within your customer journeys.

- [ ] Does the platform integrate with my CDP?
- [ ] Does the platform offer an AI chatbot?
- [ ] Can I personalize experiences for customers at scale with automation?
- [ ] How many different support channels does the platform service (chat, social, email)?
- [ ] How will this platform reduce my CS team's workload?
- [ ] What kind of collaboration tools are available?
- [ ] Can I track all customer interactions in one place to give my CS team full context?
- [ ] How does routing work? Will the right queries go to the right agents?
- [ ] How long will it take me to set everything up?

Experts recommend: Zendesk is a leader in the space, offering a complete customer service solution. You'll get access to automation tools and an AI-powered chatbot to ensure your customer service team can focus on the big queries. Intelligent routing helps get the right query to the right agent, and conversations can happen across messaging, live chat, social, email or voice. Zendesk integrates with Ortto and a huge range of other apps and partners.

HelpScout is a solution designed for simplicity, allowing smaller or fast-moving businesses to onboard quickly and start seeing results. It includes all the bells and whistles you'd expect including live chat software, customer management, workflows, and integrations. It's an affordable, scalable option that will help you along your PLG journey and integrates with Ortto.

Content and creative

What is it: Tools that support your content creation and creative engine. This is a wide-reaching category and could be an entire chapter on its own, but for set up purposes a great CMS, creative collaboration tool, social scheduling tool, and a few extras depending on your strategy will go a long way to ensure you can execute on your content plans.

Why do I need it: In a PLG SaaS environment, content plays several essential roles including lead generation, education, retention, and reactivation. At a minimum, you will want to include a blog for inspiration in addition to help pages that allow users to self-guide. Top of the funnel (TOFU) content like eBooks, templates, and checklists are a great way to bring new leads in and regularly hosting online Webinars or other live events can attract new leads while retaining your loyalists. Building community is another major part of a PLG strategy, and social scheduling tools will ensure you're able to automate content publication and engage with your community.

Content and creative tools to consider

Since this is a larger category, it's best to start building your stack with the most essential tools (CMS and social scheduling), and then work your way down the list as you grow and build out new content types:

- CMS: Contentful and Wordpress are the two most popular

- Social scheduling: Loomly, Later, and Sprout Social are top runners

- Creative collaboration: Figma is the best of the best when it comes to design collaboration. Frame.io and Vimeo help keep video production and feedback on track. Canva is the go-to for quick, simple visual content like social media graphics, infographics, and video title/end card.

- Webinar hosting: Hopin and LiveStorm offer a wide range of features for live events and webinars, and you can use Zapier to build integrations with a CDP like Ortto to automate reminder and post-live emails

- Podcast editing and hosting: Descript is an all-in-one for audio and video editing on podcasts. Hosting platforms like Megaphone and Whooshkaa will place your content on all the major podcast listening platforms.

Chapter 4: Freemium, free trial, or hybrid

Offering a free trial or freemium tier is a hallmark of a product-led growth organization. Allowing your users to try before they buy puts your product at the center of the selling experience, essentially it is selling itself.

As we've mentioned, pricing is a crucial part of PLG and your pricing tiers will play a major role in your growth strategy. That includes what you're offering for free, and how you're offering it.

Whether you opt for a freemium version of your product, a free trial, or a hybrid approach will depend on your product and how you plan on nudging your customers towards an upgrade.

Free trial vs. freemium

There are benefits to both a free trial and a freemium approach.

The free trial typically allows users to experience the best version of your product — including all features and functionality — for a limited time. Often this is set at 14 days, but the timing of your trial will largely depend on how long it takes to get a customer to take a product-qualifying action and experience their 'aha moment' (more on that later).

The freemium plan gives customers access to a limited use of your product for an indefinite period of time with zero charge to the customer. On the next page, we've provided some examples of the restrictions SaaS companies apply to their freemium plans:

- Ortto restricts access to some features and limits others. We give customers access to email marketing, one playbook, two capture widgets, plus customer data, dashboards and reporting for up to 2,000 contacts. All emails and capture widgets created by freemium users will include 'Powered by Ortto' branding which cannot be removed (this is one of our growth loops - more to come on that later).

Plans	Calculate price	Compare features

Campaign
For small businesses who want to deliver personalized campaigns to their customers.

From
$29/mo

Includes 2,000 contacts
Includes 8,000 emails/month

Start 14 day trial

More contacts? Calculate price

Professional
For teams who want to leverage data to deliver multi-channel, personalized marketing.

From
$99/mo

Includes 5,000 contacts
Includes 20,000 emails/month

Start 14 day trial

More contacts? Calculate price

Business
Advanced features for fast growing businesses who are taking the next step.

From
$299/mo

Includes 20,000 contacts
Includes 80,000 emails/month

Start 14 day trial

More contacts? Calculate price

Enterprise
For organisations seeking enterprise grade features and support.

Let's chat

Custom contacts
Custom emails/month

Contact sales

Free
Ortto branded for individuals just getting started with marketing automation.

$0/mo   Sign up

- Storage services like Box and Dropbox restrict the amount of data available.

- Canva restricts freemium users from using popular tools like background remover and brand book, and limits the number of templates, images, and illustrations available.

- Otter, a transcription and meeting collaboration tool, limits the number of minutes a freemium member can transcribe each month.

- Zoom restricts meeting time to 45 minutes for users on the free tier.

Deciding what's right for your business

There's no one 'best' solution here, it's all about finding the right solution for your product and your organization.

A freemium product opens your top-of-funnel up considerably, with OpenView Partners reporting that typical freemium tools generate 33% more free accounts for every website visitor. If you have a product that generates an output for every input (like the natural growth loop that occurs when a Zoom user invites someone to their site), it's a worthwhile strategy. That said, you can expect that your conversion rate to be lowered when users have unlimited access to a free product.

Free trials create a sense of urgency and tend to lead to more conversions. The median free-to-paid conversion rate for free trial products is 14%, compared to 7% for freemium plans.

Some companies, like Ortto, Slack, and Canva, offer both a free trial and a freemium product. This offers the best of both worlds — the freemium product has built-in growth loops and is remarkable enough to turn users into ambassadors. Freemium users are nudged to sign up for a free trial to unlock more features and become paying customers once they experience the value.

Take it from us, this hybrid strategy can take some time to perfect — you need to offer enough valuable freemium features to impress your customers, but not so much that they don't see the value in upgrading.

If you're still not sure, take a look at the statements below and put a check mark next to those you agree with:

- The product is easy to use and the onboarding process is standardized for all customers
- Users will experience an 'aha moment' within 7-14 days of using the product
- Our growth strategy does not require new users to generate an output (additional user)
- My primary business goal is near-term revenue
- My business does not currently have a significant sales team or success team in place

If the majority of statements have check marks, it's likely you should opt for a free trial. If the majority of statements do not have check marks, consider a freemium model. If you're looking at roughly half-half, consider a hybrid approach to start testing and learning.

Opt in or opt out?

Whether you've chosen to go for a free trial, freemium tier, or both, you will need to consider when to use opt-in vs. opt-out. There's really no correct answer here, like many things PLG, it all depends on the type of product and business you have. It may even be worth doing some A/B testing to see which model generates the most high-quality sign ups.

An opt-in trial does not require a credit card, but will require the user to opt-in at the end of the trial in order to continue using the product. Asking for credit card details can create friction, especially for users who want to try something out and see the value before selling it to the buyer in the organization.

That said, an opt-out trial, requiring a user to hand over their credit card details before their trial begins, is more likely to convert customers who might otherwise have let their trial expire without giving it much thought.

Here at Ortto, we do not require users to hand over credit card details to sign up for our freemium tier, but we do require a credit card for those users to activate a free trial of our paid platform. In our hybrid approach, this widens our TOFU net while capturing more conversions.

It's worth noting that our customers can cancel their account at any time, and our monthly costs are quite low. So even if a customer just forgets to opt-out after a free trial, they won't be facing a huge charge. This is an important consideration — if you are asking customers to sign up for a full year, or there are significant costs associated with your product, you may be better placed with an opt-in trial.

Chapter 5: Pricing models

Pricing your product can feel like a balancing act. Too high, and you'll struggle to move your users from a free trial or freemium tier to a paid plan. Too low and your brand image could be at risk, or you could be chasing your tail trying to generate enough leads to keep the lights on.

In a product-led growth model, pricing is even more important. Afterall, the majority of your customers may never speak to a salesperson, eliminating the chance for negotiations. It's likely you'll also be looking for opportunities to expand your customers as their business grows, meaning tiered pricing for various levels of usage will come into play.

This leads us to the next topic of pricing models. Some of the most common in the SaaS world include:

Usage pricing

A usage-based package gives customers a set usage limit at a low price, and then either charges a set fee for every increment that goes above that usage limit or prompts you to upgrade.

For example, Box, a content cloud, charges $21 per month for up to 5GB of storage on a business plan. That's enough space that the customer will spend some time with the product, upload a bunch of files, and make Box part of their day-to-day work life. But it's not quite enough in the long-term, and most businesses will be upgrading to the $35 a month 15GB plan within the first six months of use.

On the following page, we'll detail some of the benefits of usage pricing, what kind of businesses should consider usage pricing, and best practice tips for setting up your usage pricing tiers.

- Large top of funnel - you can attract small startups as well as enterprise-level customers.
- Opportunities for growth - Dropbox had a great growth loop that incentivized referrals in their usage pricing model. If the referral signed up, both the referring customer and the new customer would receive extra space on their account.

Who should use usage pricing:
- If your product is a storage or data-based product, usage can be a simple pricing model to start with.

Best practice tips for usage pricing:
- Be transparent about the data allocations and what will happen when a customer exceeds their limit.
- Set up customer journeys to remind customers when they are approaching their usage limit, and try to upsell them.
- Bring sales in for larger enterprise clients - you run the risk of your biggest customers churning when the cost gets too high. Bringing sales in to negotiate plans can go a long way to securing those bigger customers in the long term.

Per-user pricing

Similar to usage pricing, user count pricing involves charging customers based on the number of seats or users they have on their account. Of all the pricing models, this is perhaps the one that divides SaaS leaders the most. On the one hand, it is incredibly clear to a customer exactly how much they will be charged and growth happens naturally as a company grows. On the other hand, the average customer does not associate more seats with more valuable, and when the pricing starts to skyrocket after a growth spurt, you're at risk of serious churn.

Slack uses a per-user pricing model, with a monthly fee charged per person. The lowest tier sits at $6.67 per person, which doesn't seem like too much until you start to think about a startup hitting their 100-person milestone.

Choose the plan that's right for your team

Pay by month or the year, and cancel at any time.

Pro

More power for small teams who want better collaboration

$6.67 USD

per person, per month, when billed yearly
$8 USD/person, per month, when billed monthly

Top features:

- ✓ Unlimited message archive
- ✓ Unlimited apps
- ✓ Group video calls with screen sharing
- ✓ Work securely with other organizations using Slack Connect
- ✓ Create audio and video clips right in Slack
- ✓ Lightweight, voice-only conversations with Slack Huddles

Current plan

Learn more

Business+

Scale your business, increase productivity, and keep your teams connected

$12.50 USD

per person, per month, when billed yearly
$15 USD/person, per month, when billed monthly

Top features:

- ✓ 99.99% guaranteed uptime SLA
- ✓ User provisioning and deprovisioning
- ✓ SAML-based single sign-on (SSO)
- ✓ Data exports for all messages

Upgrade Now

Learn more

Enterprise Grid

Slack for the most demanding enterprises - all the flexibility to meet your regulatory requirements, and all the power to match your growth

To get a price estimate for Enterprise Grid, please contact our Sales team

Top features:

- ✓ Unlimited workspaces
- ✓ Support data loss prevention (DLP), e-Discovery and offline backup providers
- ✓ Designated customer success teams
- ✓ HIPAA-compliant message and file collaboration

Contact Sales

Learn more

Per-user pricing benefits:

- Very easy to calculate - customers are clear on what they're getting, and how costs will increase as they grow.
- Organic growth - as your customer's business grows, so does yours. Simple as that.

Who should use per-user pricing:

- If your product is B2B and adding more users gives the company more value (for example, Slack's value is seen in remote or hybrid organizations with 30+ employees), per-user pricing may be the right way to go.

Best practice tips for per-user pricing:

- Find a way to overcome shared logins. Users are likely to share logins to avoid extra costs, but that will limit your ability to expand.
- Bring Sales in for enterprise plans. Like Slack, you will need a solution for large, enterprise customers, or else you'll significantly narrow your funnel.

- Consider benefits beyond users. Customers like to experience additional benefits when they pay more for the same service, and additional seat numbers won't necessarily knock their socks off. In the example above, Slack offers advanced identity management and 24/7 support with a four-hour response time in their Business+ tier, plus a range of additional security and administrative features in their Enterprise Grid.

Tiered pricing

Tiered pricing can be a little more complicated to put together, but it is the most popular model for SaaS companies as it allows you to customize your offering based on buyer persona and needs. Usually, each tier will give customers access to a set number of seats, contacts, and features. One of the benefits of this model is that when users upgrade, the additional spend feels really worthwhile.

Ortto uses a tiered pricing model, with each tier offering customers more contacts, engagement activities, audiences, dashboards, dynamic reports, widgets, emails, custom activities, and seats.

Features Show addons	Free $0/mo Get started	Campaign $29/mo Start 14 day trial	Professional $99/mo Start 14 day trial	Business $299/mo Start 14 day trial	Enterprise Custom Start 14 day trial
Email marketing	✓	✓	✓	✓	✓
Journeys	0	0	15	30	Custom
Playbooks	1	3	15	30	Custom
Playbook actions			✓	✓	✓
SMS			Add-on	Add-on	Custom
A/B testing			✓	✓	✓
Timezone based delivery			✓	✓	✓
Customer data	Free	Campaign	Professional	Business	Enterprise
Included contacts More contacts? Calculate price	2,000	2,000	5,000	20,000	Custom

There are some features — like SMS, regionally-based data storage, account management, and advanced address lookup — that are only available in our Enterprise tier, or for an additional cost. While those add-on costs have their downfalls, there are certain features that simply cost a business more money. By passing these costs on in add-ons, rather than within part of the predetermined package, we're able to ensure that only those customers who actually use the feature are charged for them.

Tiered pricing benefits:
- Flexibility - target different types of businesses with different plans that serve their needs and limitations.
- Familiarity - customers will be very familiar with tiered pricing and, so long as you are clearly laying out what is/isn't in each of your tiers, the vast majority of product-led customers will be able to identify the right plan for them and sign up without sales, solutions or support team intervention.

Who should use tiered pricing:
- If there are different costs to your business that are associated with different features, tiered pricing can help mitigate that, passing on the costs to only those customers who will actually use the feature.
- If you are operating in a product-led sales model, tiered pricing will allow you to clearly communicate which customers will have an account manager or solutions designer, and which will not.
- If you are targeting a wide range of business types and sizes, tiered pricing that is designed to service the needs of each of your buyer personas is a good way to go.

Best practice tips for tiered pricing:
- Future-proof it. It's worth considering in advance how your upcoming product feature releases will change your tiers and price them accordingly. If you have a splashy new feature coming and you know there will be significant marketing activity around it, consider how you can ensure it will be available to the majority of your customers.
- Be transparent. Clearly explain exactly what each tier includes, and be very specific. List every little feature and inclusion so that there are no confusions down the track when the customer is onboard, playing around in the product, and suddenly realizes they do not have access to something.

Per-feature pricing

In tiered pricing, the features available in each tier are pre-determined. In a per-feature plan, a customer will opt-in to all the features they want to use and be charged for those or will choose a predetermined package of features.

The most well-known example of per-feature pricing is Amazon AWS. They have set up a pricing calculator that helps users figure out their yearly investment by selecting the features they need. This calculator is crucial, as per-feature pricing can be incredibly confusing for new customers.
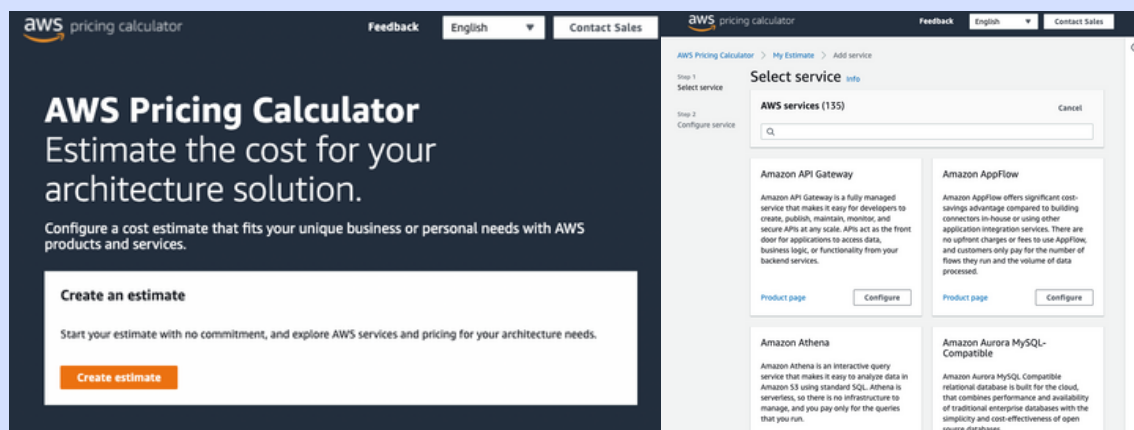

Image source: Amazon Web Services

Per-feature pricing benefits:
- Scalable - when a customer needs a new feature or wants to use a newly-released feature, they have to pay for it. Simple as that.
- Far-reaching - your net will widen as customers who might otherwise think 'I don't really need all that' can pick and mix what they DO need.

Who should use per-feature pricing:
- If you offer a huge range of features that don't rely on one another, per-feature pricing may be a good place to start.
- If you have heard customers express frustration with the bundled cost because they don't use all your features, this could be a good option.

Best practice tips for per-feature pricing:
- An interactive pricing calculator is essential to ensure you are giving customers an opportunity to understand their monthly or yearly costs.
- Consider how complementary features are priced. If one feature is reliant on another, you will want to ensure the combined cost is affordable.

Chapter 6: Product- qualified leads

Now that you've figured out what your free offering looks like, it's time to start thinking about how you will qualify those leads that come to you through your free trial or freemium offering. This starts with identifying what your product-qualifying actions are. With this, you'll be able to use a CDP like Ortto to identify product-qualified leads, score them, and route them through to a product-led or sales-led funnel.

What is a PQL (product-qualified lead)?

Essentially, a product-qualified lead is a lead who has experienced their 'aha moment'. They've seen the value first-hand, and they're most likely going to be ready to commit to your product.

This means that the PQL you set for your product today may need to change as your product changes, and that's ok. The important thing is that this metric is optimized towards and tracked, so leads can be nurtured properly.

Benefits of PQLs

"OK, but don't we have enough lead-qualifying data to collect and analyze!?"

Well, yes, but there are several compelling reasons to prioritize PQLs over other qualifying metrics and while the initial set up may feel time-consuming and even confusing, it really will be worth its weight in gold.

On the next page, we've detailed just some of the many reasons PQLs will transform your business for the better.

1

Actions speak louder than words

Customers may tell salespeople that they've seen the value of your product just to be nice or in a bid to get off the phone. A product-qualifying action is more reliable.

2

More likely to convert and less likely to churn

Think about it - a PQL has already invested time in your product and they've taken an action that indicates they've experienced the value, making them more likely to stick around.

3

Shorten the sales cycle

Since the prospect has used the product first hand, they've skipped ahead in the sales cycle meaning your team can get to more people and have more meaningful conversations.

4

Lower CAC and a higher ACV

When the sales cycle is shortened and the customer is convinced of the product, customer acquisition costs go down and annual contract values go up. Win win.

How to identify PQLs for your business

In order to identify a PQL for your product, you'll need to look at which action customers take before they become an active and engaged user of your product, and identify the behaviors that lead to them upgrading.

This action will be unique to your business. To give you an example, here are some product-qualifying actions to consider:

- Hitting a usage limit on your product
- Heavy use of a feature
- Use of a specific product feature
- Reaching success milestones (making a sale or driving engagements)

Identifying your product-qualifying actions can feel daunting. After all, there are likely thousands of actions a customer can take with your product and many of them will be meaningful to the product experience.

The best place to start is at the end. Take a look at your existing paying customers and start to identify some of the commonalities in their behavior by speaking to your sales, marketing, and customer success teams.

You can then use this anecdotal information to guide your product usage exploration. Use data to discover what the most active customers have in common, which key features these customers use the most, when product usage begins to increase, and what freemium customers were doing with your product before they made the decision to upgrade.

With this information in hand, you'll start to paint a picture of the customer journey to define your PQL.

Examples of PQLs

Since no two companies have the exact same product, no two companies have the exact same definition of a product-qualified lead. But it can be helpful to see how other companies might define PQLs and how simple they might be.

- Slack: A team sending 2,000 messages
- Zendesk: Populating their customer-facing help center with content
- WorkOS: External connections (integrations)
- Dropbox: Number of file uploads
- Expensify: Number of invoices sent within one month

> *"Based on experience of which companies stuck with us and which didn't, we decided that any team that has exchanged 2,000 messages in its history has tried Slack–really tried it"*
>
> Slack Founder Stewart Butterfield, told to Fast Company

In each of these examples, you'll see a PQL definition directly tied to the true value of the product. It is an action that shows us your user has reached their 'aha moment'.

Growing PQLs using Ortto

As an Ortto customer, you'll be able to set up a Custom Activity to tell you every time a user takes an action that is important to your business. This means you can use marketing messages to guide your existing customer database to get to your product-qualifying action, experience their 'aha moment', and become an official PQL.

Let's say we're a project management tool and we know our product-qualifying action is a user setting up a task and then inviting colleagues to the platform within the first 7 days.

By setting up custom activities for key events such as signing up, creating a meeting, and inviting a guest, we can prompt a user to follow this journey.

This is what the flow would look like:
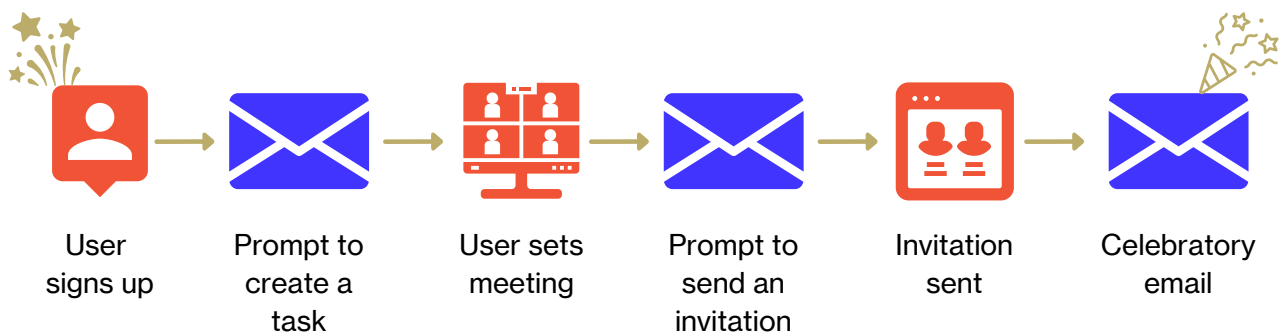
- User signs up > triggers a Welcome email prompting them to set a meeting
- User sets up a meeting > triggers an email prompting them to invite someone to their meeting
- They send the invitation > we congratulate them on their first meeting

Now you have a PQL and can continue to nurture the lead through a series of automated messages or trigger a Slack message notifying your sales team that a high-value product-qualified lead has completed the key actions, prompting them to reach out.
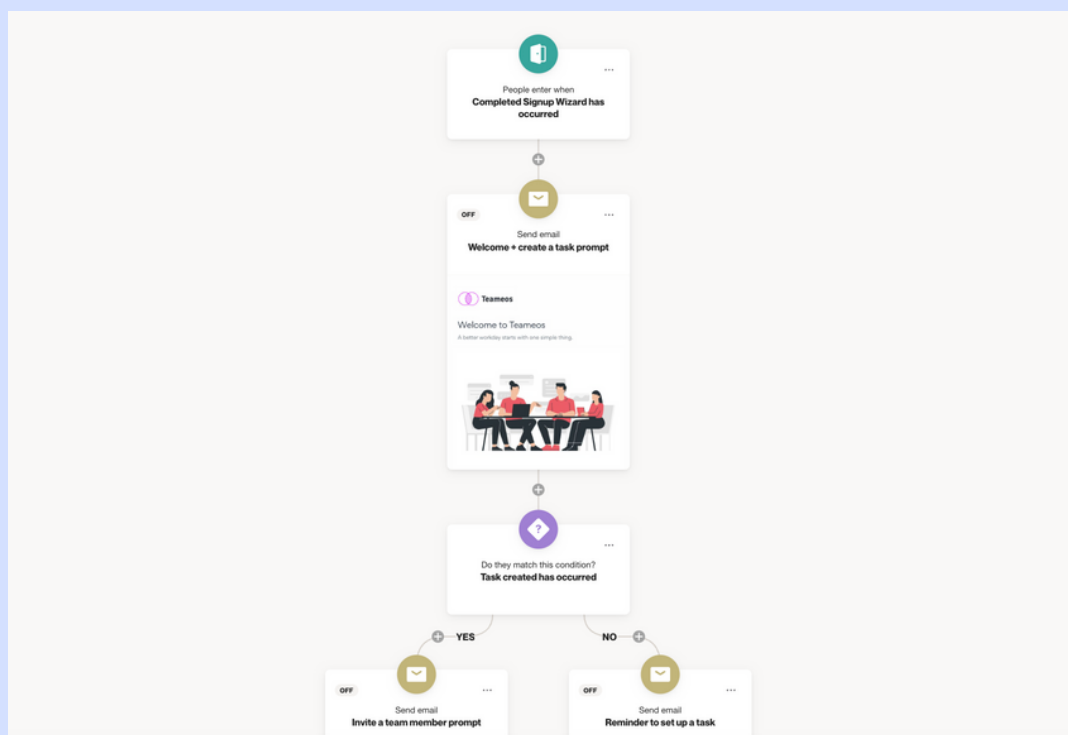
Lead scoring and nurturing

For some businesses, especially those with a large volume of users on their freemium product, the product-qualifying action could be just one piece of the pie when it comes to lead scoring.

Along with the action, you can pass a range of attributes, such as where they are located, which plan they signed up for, what UTM parameters were in their referral URL — whatever data your team would like to see. This information can help score your leads and set them off on the right nurture journey.

This is where data unification and a sophisticated segmentation is essential. Take a look at the example below — you can see how we have segmented out the leads that have occurred within 60 days, belong to an organization of 100 people or more. This becomes our 'High Value Leads' segment.

We can use this segment to set up a Journey that begins when the lead takes the product-qualifying action. That Journey can include both automated emails or SMS messages, as well as Slack or email alerts to ensure that your sales team knows this lead is hot, hot, hot.

Chapter 7: Onboarding

Now that you have a free offering (or two) in place and a product-qualifying action identified, you have a starting point and goal for the first, and arguably the most important, customer journey you'll build: Onboarding.

Your customer's first experiences with your product are absolutely crucial in a product-led growth model. It essentially determines whether or not your customer makes that all-important shift from freemium or free trial user to a paying, engaged user.

User onboarding

SaaS customer onboarding describes the process that users go through when they initially sign up for your product. Think of it as the roadmap from sign-up to 'aha.'

Onboarding usually includes things like a product tour, a series of steps the user needs to take to get set up, and a library of resources that help them find solutions.

This phase within the customer lifecycle starts with sign-up and ends when your product has become part of their routine, when they've seen the value of the product, and/or when they can confidently use basic features of the product.

In a free trial model, this endpoint should occur a few days before the free trial ends. In a freemium model, two to three weeks maximum is a good guideline, depending on the need your product serves. Remember — people aren't patient. The sooner you can get them to 'aha,' the better.

Why is user onboarding important in a PLG model?

For PLG, user onboarding is perhaps the most important part of your customer's entire journey.

If you have a free trial model, it is the determining factor for conversion — if your customer is able to experience their 'aha moment' right before they're asked to commit to a paid plan, you'll be well placed to win them over without sales intervention.

As the statistics below prove, onboarding is also essential for reducing churn, increasing revenue, and meeting the expectation of customers who want to learn to use products on their own, and fast.

- Onboarding is the stage of the customer journey with the highest churn. 25% of users abandon apps after just one use (Appcues)

- The biggest drop-off in usage (nearly 75%) happens during week 0 and week 1 (Appcues)

- 70% of customers say understanding how they use products and services is very important to winning their business. (Salesforce)

- 73% of customers want the ability to solve product/service issues on their own. (Aspect)

25%
of users abandon apps after one use

What should the SaaS onboarding experience look like?

Every SaaS product is different, which means every SaaS user onboarding experience will be different. In this section, we're going to focus on the five stages of SaaS onboarding that should be established for customers on free-trial or freemium plans.

Ultimately, we're getting these leads to PQL status so if and when your sales team do get involved, their job will be to hit that homerun.

Phase one: Map out a gold standard customer journey

First, you'll need to unify your data in a customer data platform like Ortto to get a single view of your customer and their journey. With this information, you can use segmentation to get a view of customers with the fastest time to conversion, the average customer's time to conversion, and those who did not convert.

Take each segment and start to map out the steps that commonly appear during the onboarding phase. You should wind up with three journeys — gold standard, average, and no conversion.

You should start to see patterns of activity that can inform what your gold standard journey looks like, and how you could build a marketing playbook that speeds up time to conversion on your average segment and helps get the no conversion segment across the line.

Phase two: Sign up experience

Your onboarding experience starts the second your customer hits that sign-up button. You want to make the experience simple and representative of your brand, but, in many cases, you'll also want to get a bit of information out of your new customer so that you can cater your welcome experiences to their needs.

Here are examples of how an information-gathering sign-up process looks in a B2B and B2C environment.
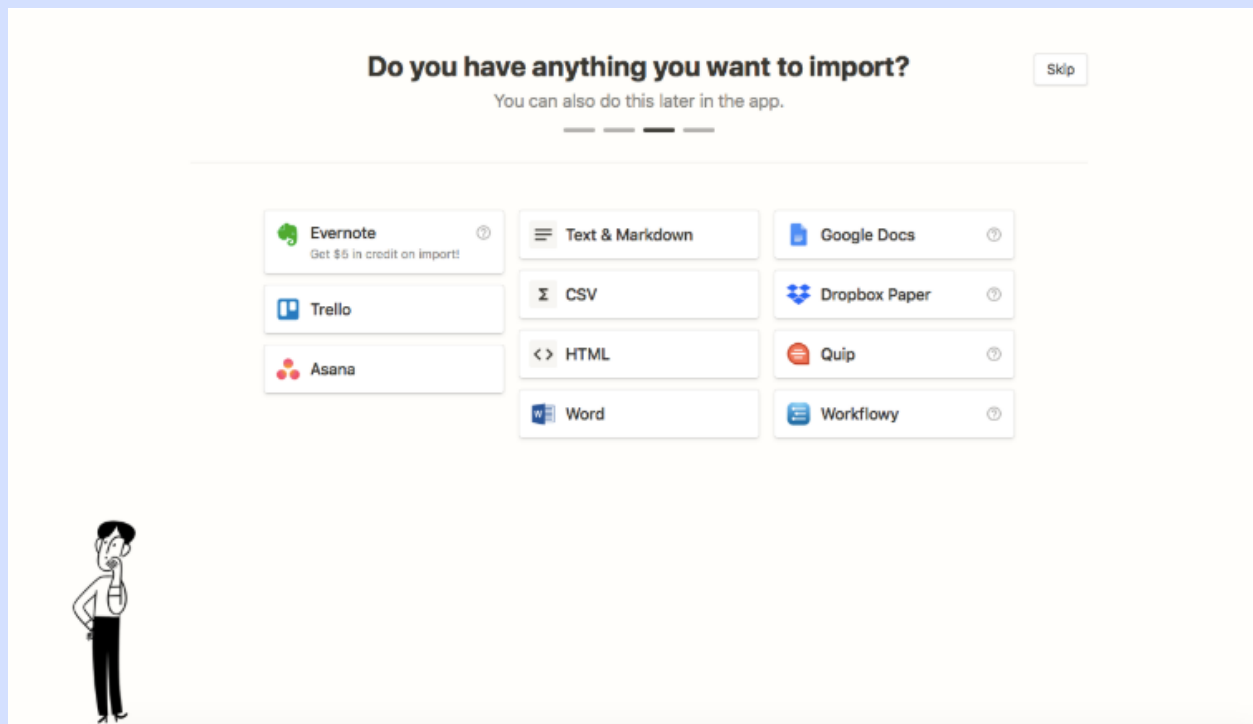
Image source: Notion

B2B: Notion's Import Options

Many B2B companies (including Ortto) will need their customers to connect other products or import data before they can get the most out of the product.

There are several ways to do this. At Ortto, we cover this off in our welcome email. Notion opts to do it during the sign-up process while making it clear that the customer can choose to do it later if they don't have the time right now or want to further explore the product before any decisions are made.

You might notice that importing data from Evernote earns the user a $5 credit — possibly because the data has shown Evernote integration is a fast track to 'aha' for existing users.

The advantage of having this pop up during sign-up is that the customer will land in the product with a lot more information and they'll be closer to qualified-lead status. The disadvantage is it may deter some people from getting to the end of the sign-up process — but the ability to skip does help solve that.

Whether your data import process comes at sign up or later, it's important to make the connection easy and fast. If it can't be fast, let the customer know that they can go away and do other things and set up a campaign that alerts the user when the import is complete.

B2C: Headspace's sign up process

Headspace is a meditation app designed to make meditation simple and accessible. Most people who sign up to Headspace have never meditated before, or have tried and given up. Helping their users make a habit of meditation is crucial to reduce churn, so they use behavioral psychology to create an onboarding experience designed to make a habit stick.

First up, the user is asked why they want to meditate. We're more likely to stick to healthy habits if the habit is anchored to a larger reason.

Next, they ask about timing, but rather than a simple 'morning, noon, or night' prompt, Headspace asks users to select an existing habit, like brushing our teeth. This is a clever churn-busting tactic. We know that habit stacking — the act of connecting a new habit to an existing one — helps us stick to our new healthy habits, so Headspace is setting the user up to stack meditation with an existing habit.

Finally, users are given a little recap before being prompted to Meditate Now or Explore the App. The sooner the user mediates, the sooner they'll see the benefits, so that's the option our eye is drawn to.

Image source: Reallygoodux
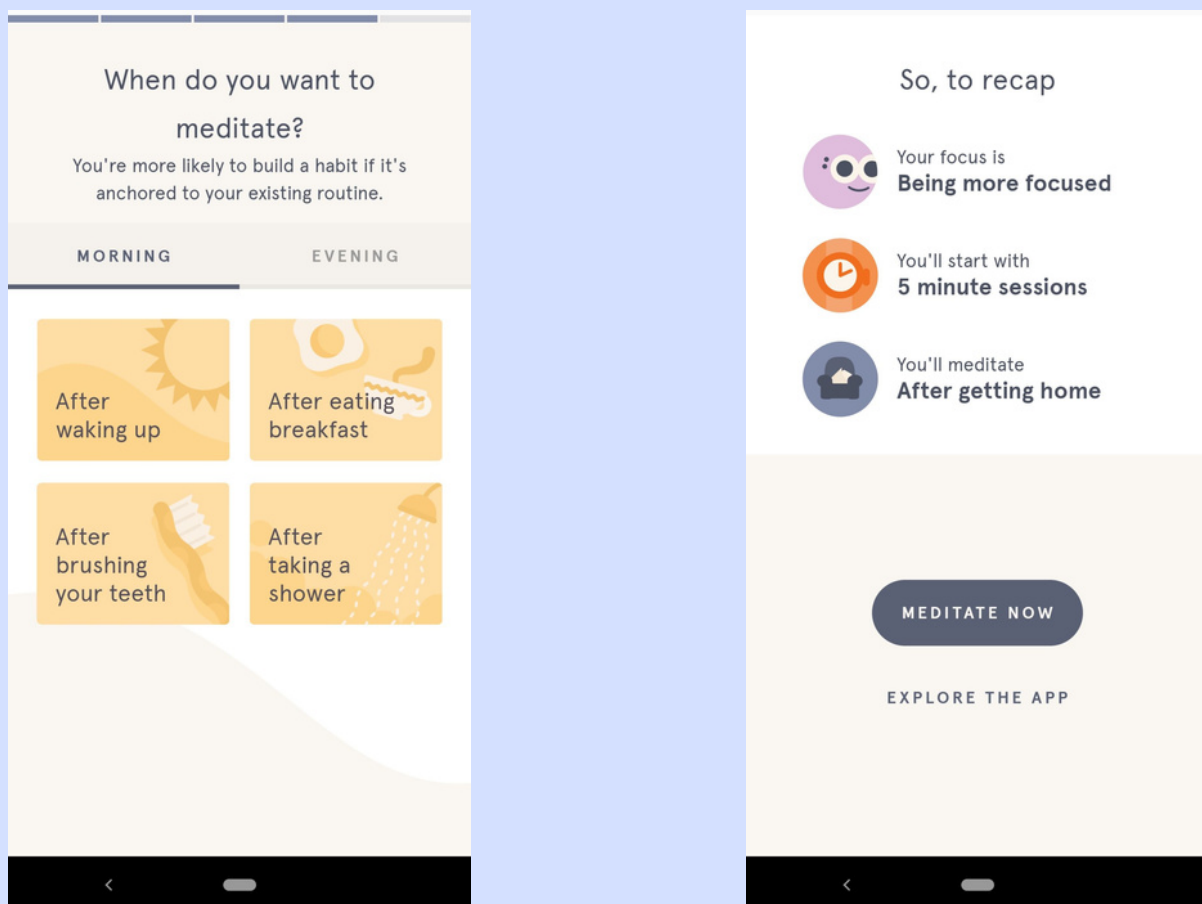
Phase three: Welcome email

A welcome email is, at this point, table stakes. Your user expects it, and welcome emails are the most opened email you'll send, with a staggering 86.03% open rate.

Before you even think about the content of the email, consider how you can segment your new users to ensure they receive a relevant message. At Ortto, we've set up three different campaigns, each of which is triggered by a different sign-up entry point:

- Generic onboarding to freemium product
- Shopify app installation
- Free trial to our pro tier

Each of these emails serves a slightly different purpose. Check out our templates below.

- Generic welcome email

In our generic onboarding, we recommend six steps to help the user get their account set up and ready to go. As we mentioned above, this is where we ask our customers to import their subscribers and add tracking codes so they can immediately start seeing the benefits of our platform. We've used custom Reports in Ortto to identify the steps users who convert take to reach their 'aha moment', and those steps have informed our setup list.

- Shopify welcome email

For customers who signed up via the Shopify App Store, these steps are tweaked to ensure they are relevant to our ecommerce customers. You'll see our steps are very specific — Ortto offers a huge variety of capture campaigns, but we've chosen to highlight the 'spin wheel' to grow subscribers because we know it has a high success rate for our customers and it's a more memorable experience for both our customer and theirs.

- Free trial of pro product

In our free trial model, the user has already used our freemium product and most likely has worked through the steps above. They may have also had a product demonstration with our team.

So, we skip the steps and get straight to the point, outlining what you're getting

and for how long, offering a helping hand and reminding the customer that they will be charged after the 14-days unless they downgrade their plan (transparency is everything!).

Each of these variations is necessary for us to ensure the customer is getting the information that is relevant to them. It's a surefire way of giving the customer a good first impression without wasting any of their time.

Phase Four: First login experience

Your customer's first login experience is incredibly important. It's the time to prove what your marketing messages or sales team promised.

Your customer already knows what your product does. They've seen marketing messages, positive reviews, your brand's personality, and values, and your product's promise. You don't have to re-sell it to them, just like you don't need to re-tell your story to a Hinge date after you've been talking to them online for weeks.

You need to deliver on what was promised and guide them to 'aha'.

To deliver this, you'll need to plan out the first login experience focusing on the critical action points along that gold standard customer journey you looked at in phase one. There are so many ways to do this, and plenty of inspiration from SaaS brands doing it really well.

Below we'll take a look at just some of the different ways your product tour could be set up, along with best-in-class examples.

- Product tour or walkthrough

This is a popular one, using sequential messages to guide your users through the platform and highlight the most important features a newbie should know about.

You should aim for about 3-5 steps in a product tour, but there's no hard-and-fast rule — it's all about matching the experience to your customer's expectations.

For example, if you're signing up to a tool like Semrush, you're going to expect the onboarding process to be a little more complicated than signing up to Slack.

In the best example from Webflow below, you'll see how they've used tooltips to guide new users through the main product features. Given Webflow is all about building a website, the tutorial does have a few more steps than the average, but Webflow keeps it easy with clear prompts and interactive elements along the way. Building something similar is simpler than you may think — Appcues builder (as mentioned in our tech stack section) can get you started in a few clicks.

Image source: Reallygoodux
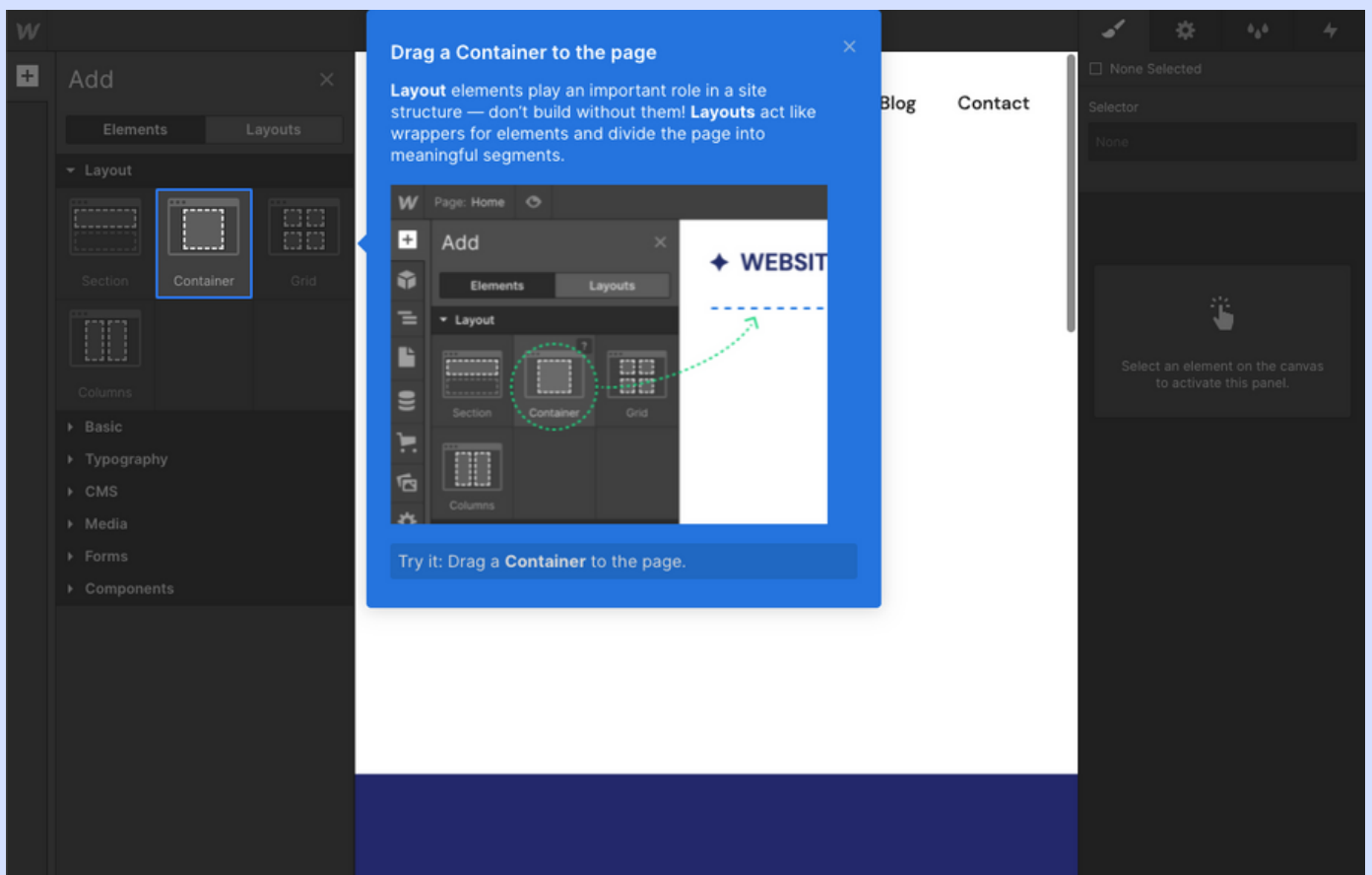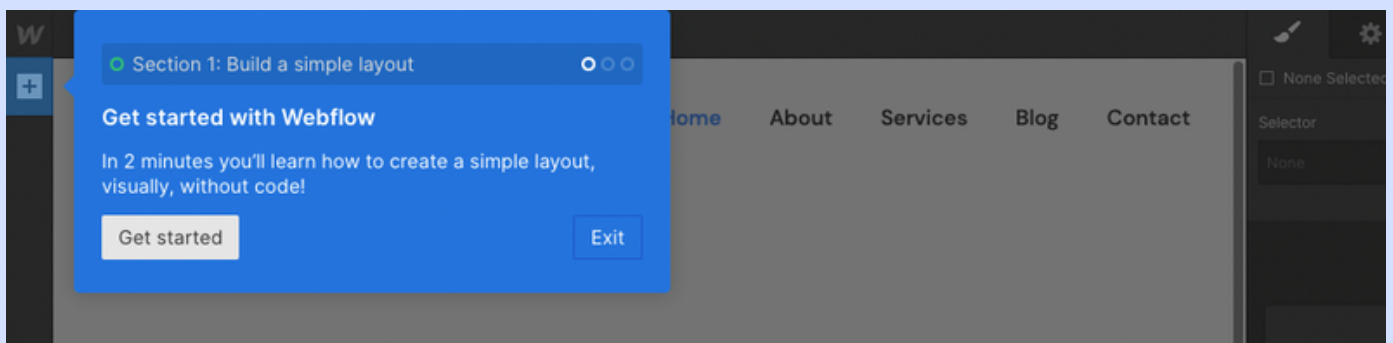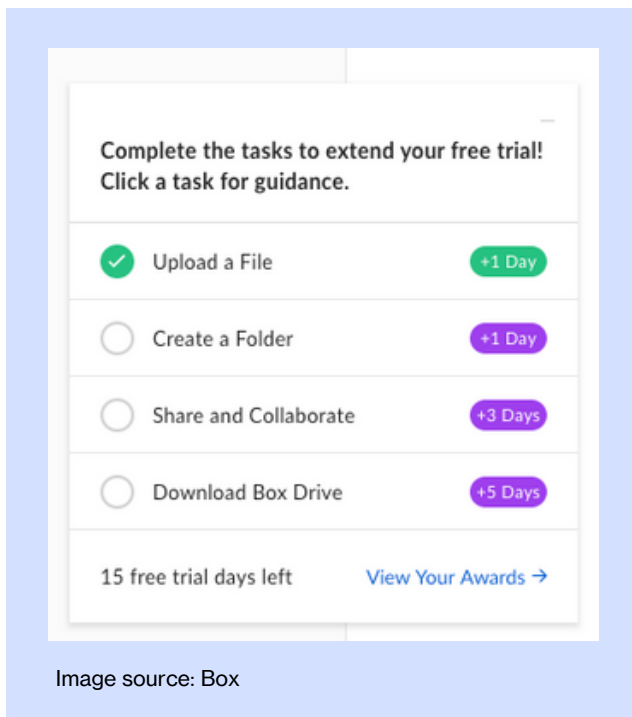
- Checklist

The checklist is a great way to get your users to start doing, guiding them through the most critical action points and closer 'aha'.

Image source: Box

Box has outlined four clear steps that users need to get through in order to reach product-qualified lead status and, rather than just laying these steps out in a checklist, they actually incentivize the user to take each step by giving them additional days in their free trial.

The user can then see how they're progressing towards their full 14-day free trial and every time a checklist task is complete, Box prompts the user with clear tooltips to ensure they have a clear sense of the next steps.

- Learn-by-doing

We see a little bit of this throughout Webflow's tooltips-based onboarding, but some SaaS businesses can lean entirely on a learn-by-doing example to guide their users through a product.

Grammarly is a great example of this approach. When the user logs in for the first time, they are prompted to check a demo document teaching users how Grammarly works. It's incredibly simple and effective, showing off the value of the product efficiently and effectively.
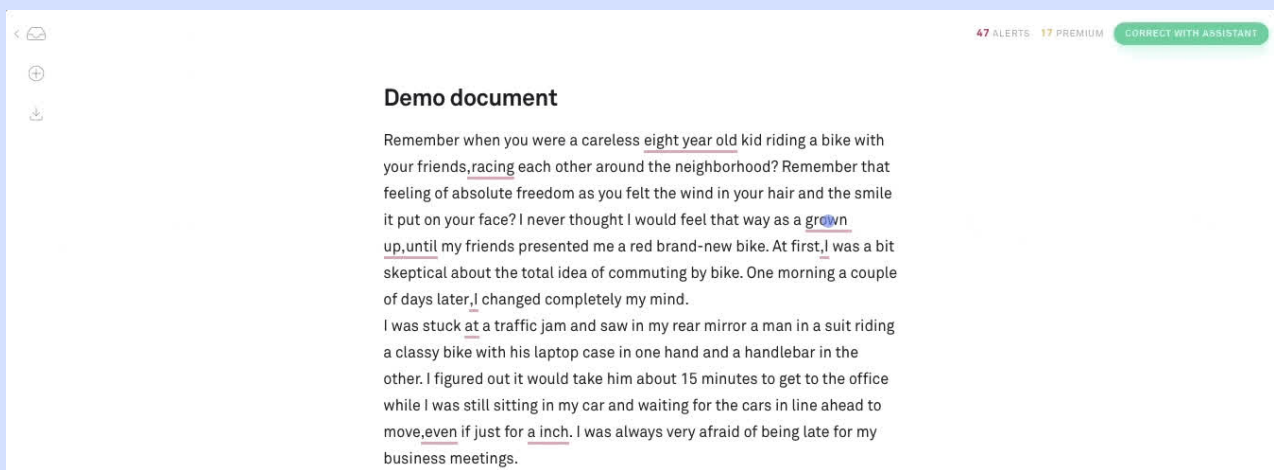
Phase five: Onboarding support

With a product tour done and dusted, your customer will be inspired to get started with your product. But they'll need some nudging in the right direction to reach their wow moment in that 2-3 week period.

Start by thinking about the crucial steps in your product tour — the ones that can't be missed — and set up campaigns that are triggered by inaction to remind your customers to take those steps. For example, at Ortto we have a Complete Account Setup campaign sent to customers with a Shopify integration to ensure they complete the setup wizard.

Next, consider the other critical action points your users need to take that haven't been covered in your product tour or the more flashy, fun features to make a splash about with some content.

Semrush does a great job of this. As a fairly complicated product with a lot of tools, they use email to drip-feed features to their new users. Each email includes the feature, along with some information on how to use it and, of course, a CTA.
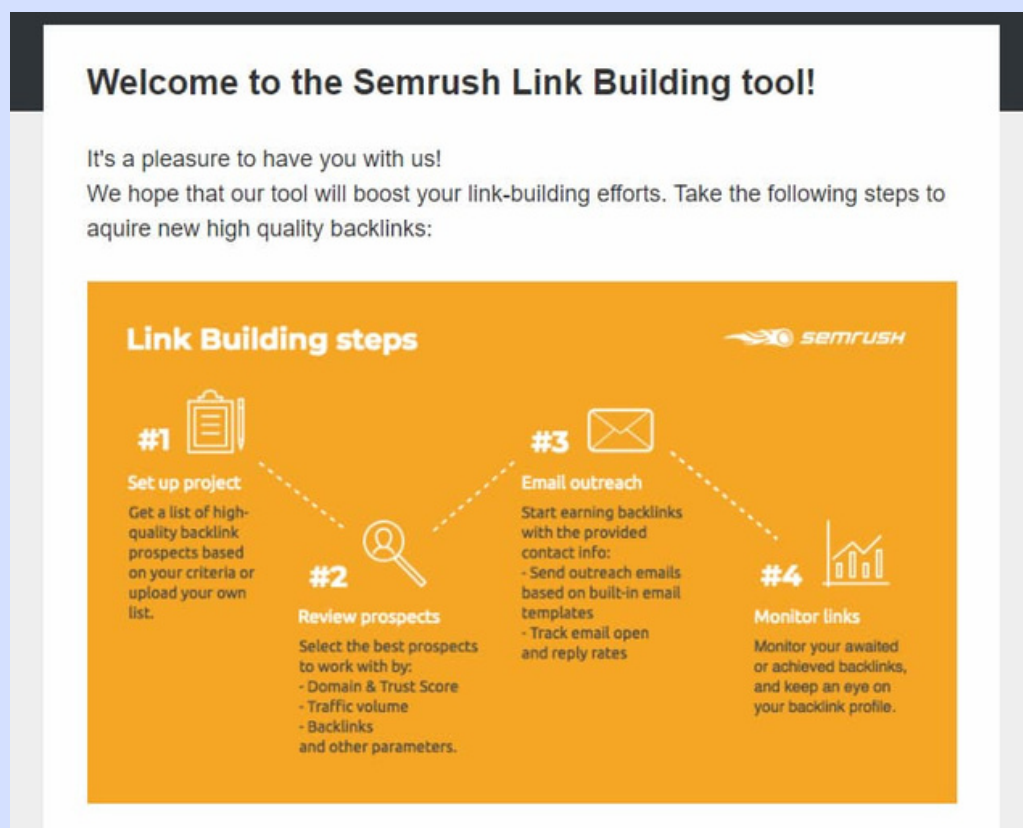
This phase of onboarding really will look different for every product. It may include popups, tooltips, or chatbots to guide your user along the way.

You'll also want to ensure your new customers are directed to your knowledge base so they can search for answers on their own as they arise. Keep your documentation up to date, add different formats like video and visual to cater to a wider array of customers, and ensure your knowledge base is easy to search.

Optimizing the onboarding journey

In chapter 10, we'll share more details on the metrics to track to measure the success of your onboarding journey. It's important to keep an eye on these metrics and make continuous optimizations to help more customers reach the goals they've set out to achieve with your product. As time goes on, you may develop multiple onboarding flows to help different types of customers achieve different things.

Now, with your customers converting from free tiers to paid, it's time for growth and expansion.

Growth and expansion

Chapter 8: Growth

It's not called product-led growth for nothing. As every SaaS professional knows, growth is a continuous process. It permeates every stage of the customer lifecycle and there really is no ceiling when it comes to growth.

In this section of the eBook, we're going to focus on some growth and expansion strategies that are specific to the PLG model — the product-led growth flywheel, growth loops, and community-led growth. But first, we'll explore why the traditional funnel model falls flat for SaaS companies operating in a PLG model, making these new models necessary.

The funnel is flawed

The AARRR Funnel Framework was developed by Dave McClure, an entrepreneur, angel investor and founder of the business accelerator 500 Startups, as a way to think about the five most important metrics for product growth, and how they relate to one another.

McClure shared this framework with the world back in 2007 and it has served the growth world well, helping businesses of all shapes and sizes to develop a model of customer behavior that can be tracked and improved upon.

There's a reason it has been so widely adopted — it simplified the complicated and helped many businesses grow. But in 2022, with a wealth of new technology and learnings at our fingertips, it falls flat for several reasons.

Funnels create silos in the business

According to Reforge, by framing these steps up in a funnel, we tend to place teams in different segments of the funnel. Marketing may be responsible for acquisition, while product is responsible for retention. In thinking this way, marketing is incentivized to increase new users, without thinking about how those users will be retained long-term. With the shift to product-led growth, everyone in the organization will be working towards a common goal.

Funnels are hungry and expensive

With an AARRR approach, you have to keep feeding that hungry funnel new inputs through acquisition activities like paid search, content marketing, or social media marketing. These activities cost the business time and money, meaning there's a limit to how many new users can enter and move through the funnel, especially when we consider how CACs (Customer Acquisition Costs) are increasing.

Funnels are linear

Because funnels are linear and rely on a steady flow of inputs, the product's growth becomes linear. While this can benefit your business in the short term, it does tend to put a cap on your growth in the long term.

Take the chart below — the dark blue line represents Netflix's actual public quarterly earnings. Netflix has a growth loop model in their recommendation engine, which grows stronger and stronger as the customer consumes more content (which, as we know all too well, causes us to watch even more content, and recommend this content to our friends).

The light blue line is an example of how linear growth may have looked if Netflix were operating in a traditional funnel — and we can see that while initially the results are slightly better, in the long term their quarterly earnings are just 60% of what they could be.
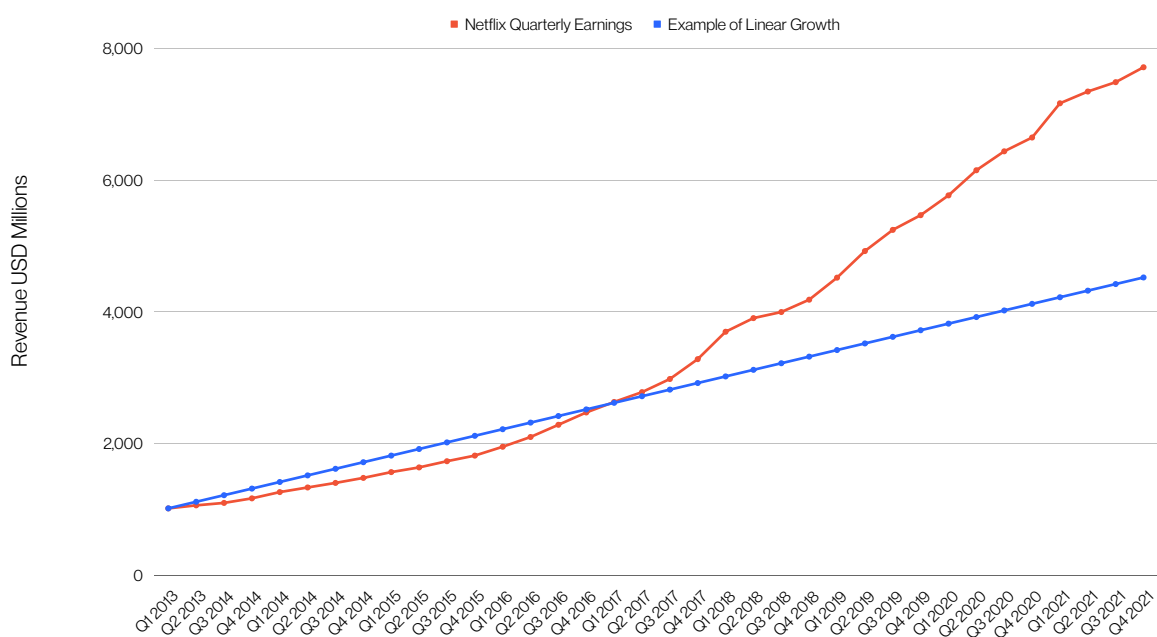
They're easy to replicate

Replicating marketing tactics is easier now than it's ever been before. We can search the Facebook Ads Library for our competitor's messaging, use Semrush to delve into their content strategy, and sign up to their emails to get a first-hand look at their email marketing. This makes several steps in the AARRR funnel easy to replicate. When we switch to a growth loop model, the steps are far more unique to the product itself, and therefore much harder to replicate.

An alternative: product-led growth flywheel

The flywheel is a framework developed by the Product-Led Growth Collective and is designed to provide a modern, PLG-friendly replacement for the funnel. A flywheel depicts the stages in the user journey from awareness to advocate (the inside wheel below) and the key actions users need to take to graduate to the next stage (the outside wheel below).
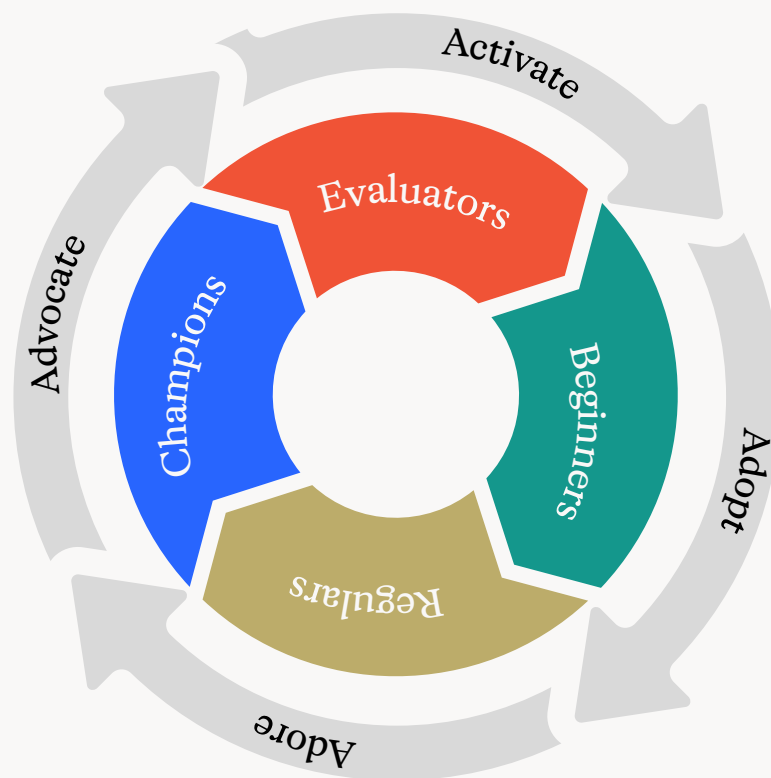
By now you've probably gathered that in PLG, moving users through the different stages of product adoption is crucial to increasing paid user numbers and revenue — the flywheel is a model that provides user motivations and goals at every stage of the journey to guide product-led growth.

Here's how it works: As the rate of users completing each action increases, the flywheel spins faster and increases the rate of acquisition. Essentially, with more users reaching the advocacy stage, more users are entering into the flywheel, creating exponential growth rather than linear growth (like you would see in a funnel model - more on that later).

Below, we'll move through each phase of the flywheel and summarize the goals and objectives for each stage.

1.Evaluators

Evaluators are in their awareness phase. They're researching their options, consuming content and reviews, and asking their network about your product.

If you have a free trial or freemium tier, it's likely they are using your product along with competitor's products to see which solution is right for them. It's unlikely they are using your product in their workflow or onboarding additional team members, they're just playing around to see what's possible.

The goal here is to get evaluators through the onboarding process to help them reach their 'aha moment' and get them to activate. To do this, you will need to set up a great onboarding journey. And remember, less is best. You want them to reach 'aha' without burying them in information.

2. Beginners

Beginners are getting started with your product. It's likely they have some expectations around what your product can do. They may be paying customers or continuing use of your freemium version after experiencing their 'aha moment'. They're somewhat committed, so they will start incorporating your product into their workflows and bringing other users on board.

In this phase, you need to deliver on their expectations and even exceed them by showing some of the other features or use cases available. To deliver value, reduce friction by making knowledge bases, chatbots, how-to guides, and forums available at any time to help them help themselves.

The goal here is to get these beginners to make your product part of their day-to-day lives through habitual use.

3. Regulars

Regulars are users with high engagement scores. They're logging in frequently and they rely on your product.

At this stage, switching to another solution would take considerable time and effort — it's unlikely they'll do so unless they find a considerably better option or have a negative experience with your product or customer service.

Regulars want your product to work as expected. While they're likely to be set in their ways when it comes to product usage, they will be open to hearing about new use cases or efficiency, and they'll engage with content around new features, advanced features, and product updates. They're also more likely to engage with customer feedback forms or proactively make requests.

It can be easy to think of your regulars as a 'set and forget' audience, but keeping engagement levels high and getting these regulars excited about new features or an amazing customer experience can go a long way to helping them adore your product. And adoration leads to advocacy — the last stop in our wheel.

4. Champions

Your champions are your superfans. They love your product, they have an emotional connection to your brand, and they get excited when you announce launches or updates. They're more likely to participate in beta testing or case studies.

Champions keep your flywheel spinning. They're going to tell their network about your product and provide references that will convince prospective customers to take the leap.

Find ways to let them know you love them as much as they love your product — send swag, invite them to exclusive events, give them advanced guidance on power-use features, and engage with them on social media platforms.

This above-and-beyond treatment is the magic dust that leads champions to advocate for your business, helping you grow.

Creating growth loops

In a flywheel model, users are producing an input (another user) through advocacy. Growth loops, a concept popularized by Reforge after they published the blog 'Growth loops are the new funnels' take this one step further, purposefully building a mechanism that encourages users at every stage of the journey to create an input (another user).

With this model, every input (user) goes through a series of predefined steps to generate an output. That output is then reinvested as an input (a new user) and, since this is a closed-loop system, the process repeats.

Let's consider this in more tangible terms. The examples below have been used by real SaaS companies to create exponential growth.

Ortto's growth loop

If you've signed up for a free plan with us or have received marketing material from some of our customers, you may have noticed that we have a logo and CTA on some emails and widgets.

For example, a capture widget our customer runs through our free plan would include the Ortto logo and a CTA that reads 'Create free widgets like this with Ortto'. This CTA prompts new users to sign up for a free or paid account, and the loop continues.

Output
Spin the Wheel capture widget includes Ortto branding and CTA.

Input
New customer signs up to Ortto

Action
Customer creates their first Spin the Wheel capture widget

Activation
Ortto prompts customer to create a capture widget on our free plan
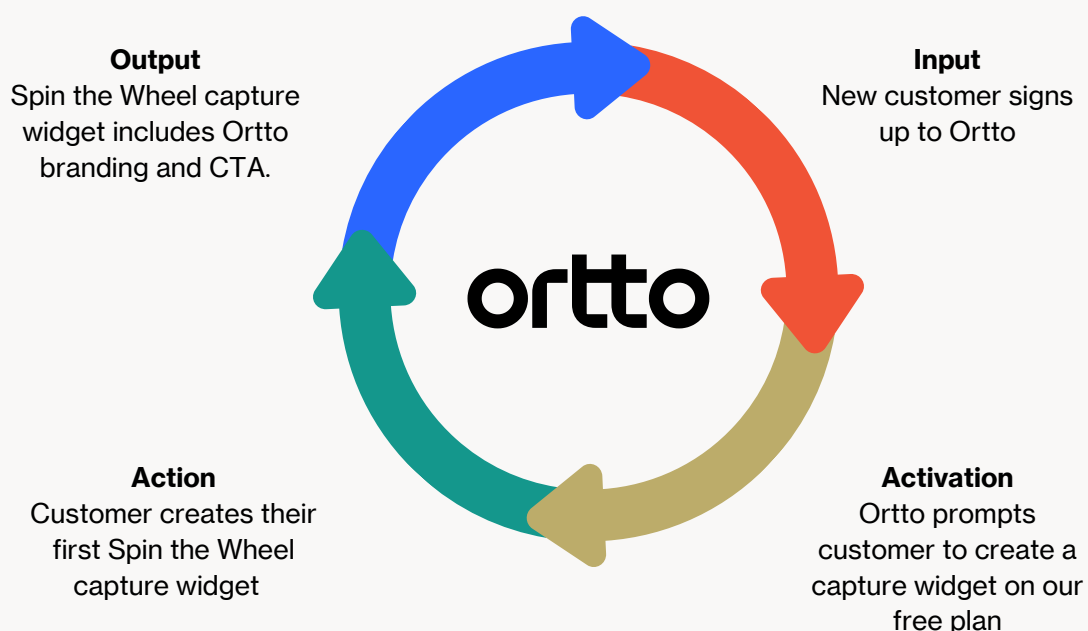
We use UTMs on these links to track and attribute our growth loops activity in a custom dashboard on the Ortto platform. The dashboard would include UTM variables that may look like this:

- campaign: growth-loop
- Source: Ortto
- Medium: capture-widget

This allows us to drill down and look at how our growth loops are performing, not just at a click-through or sign-up level, but against quality metrics like:

- How many users signed up from growth loop activity
- How much MRR was contributed
- CVR (Conversion Rate) from visitor to sign up

By tracking these metrics in the Ortto CDP, we'll be able to learn which growth loops are bringing in the most engaged customers at any given time.

Types of growth loops

There are many types of growth loops and, as more companies swap funnels for loops, there's sure to be more to come. Three of the most common loops are viral, paid, and UGC.

- The viral loop

In the viral loop, a user signs up, interacts with the product, then shares the product or a piece of content with a contact, or invites a contact to join. That output creates an input and the loop continues.

- The UGC loop

Pinterest is the perfect example of a UGC loop. The user signs up, creates their own content, and that content is then indexed on search engines, so more visitors discover the platform through search.

- The paid loop

In this type of loop, the user is acquired through paid marketing activities like search or social. Once the user transacts on the site or signs up, money is generated to pay for more users to be acquired in the same way.

Implementing growth loops

You've just completed step one. You now understand what a growth loop is and how it operates in other businesses.

Step two is to map out what your growth loop could look like, and figure out how you can measure it along the way. The best place to start is with your existing funnel — start plugging this into a loop model and consider how things would change if you were to shift to a loop model. It can be helpful to ask multiple people across the business a series of questions:

- How do prospects discover your product?
- How are users retained?
- How could users benefit from being part of a loop that brings new people into the product?

Once your loop is mapped, you'll need to figure out how to engage your user along the journey and push them through the loop. This works best when the prompts are based on actions rather than time-based metrics. If you're an Ortto customer, you can set this up by establishing Custom Activities that can trigger a specific campaign.

Every team should be involved in the loop - from product to marketing to sales. And, as with all things growth, it's important to remain agile in your approach, testing, learning, and tweaking along the way to your ideal loop.

The role of retention & engagement

For growth loops to work well, the user (input) who enters the loop needs to stick around, and engage with the product. Only then will they produce the output needed to keep on growing.

TikTok's For You Page, which operates on an extremely sophisticated algorithm to recommend content that appeals to the individual, is an example of this kind of sticky feature that has created a growth loop.

The more content users consume, the more the algorithm learns, delivering the customer even more relevant content. This keeps the audience in the loop for longer, increases their watch time, and means they're more likely to recommend the platform or a specific show to a friend.

Community-led growth

One of the newer growth tactics dominating SaaS companies that have adopted a PLG strategy is community-led growth.

Given that your product is so spectacular it sells itself, your flywheel is taking users from adoption to advocacy, and your users are comfortable with self-servicing, it's no surprise that products built with PLG in mind wind up with a lot of superfans.

These superfans are, in many cases, forming communities that smart brands tap into to continue their own growth. This is community-led growth — the act of fostering a strong, engaged, enthusiastic community and making them a key component to your product's growth.

Anyone who has managed a social media platform in their career will be thrilled to hear that community-led growth is a lot less focused on the vanity metrics like followers or likes, and a lot more focused on the things that make a real community special. Think interaction, participation, a sense of belonging, giving advice or solving problems together, and even sharing in-jokes.

What's caused the community-led growth wave in SaaS?

Community-led growth has been gaining traction because of a confluence of events:

- People started seeking community online

By now you're probably sick of hearing about COVID-19 accelerating changes in the tech world, but it really has caused a seismic shift in the way we interact online as professionals. Sent indoors, away from the chatter of colleagues and the coffee catch-ups with peers, professionals around the world have been craving a sense of community and a way to network. So we built it or found it online. Throughout the pandemic, Slack groups around specific topics like B2B content marketing and product-led growth popped up, while Instagram accounts like @workinsocialtheysaid and @mediasellerproblems flourished as workers looked for people who just got it, and wanted to laugh through it.

All of this meant that people were gathering in online communities to "talk shop" in a new way. Given that hybrid work is here to stay, those communities will only get stronger over time.

- Crowd-sourcing opinions is crucial in a saturated market

At the close of 2021, the US alone had 15,000 SaaS companies and the SaaS market was valued at $145.5 billion in 2021, set to grow to $171.9 billion in 2022. SaaS is exploding.

And where once there were a few solutions to each problem, now customers are faced with a huge array of options. Short of trialing every single one, the best option is to speak to other professionals who have tried one or multiple options. Let's say you're the Managing Editor at a digital publication. You need a productivity tool that is robust enough to support a huge number of tasks and team members, but intuitive enough that writers and creatives will actually WANT to use it. Maybe you've tried Asana and Trello before, but you've heard good things about Monday and Notion. And, so, before you've even had the need to search 'best project management software for writers,' you have four options in front of you. So you go to your community of writers and editors and you ask them. What you get in return is more than just a star rating, it's a real experience from people who use the platform in the exact same way you intend to. What could be better than that?

- Parasocial relationships have strengthened

Parasocial relationships are most often referenced in relation to celebrities or, more recently, influencers. The COVID-19 pandemic (here we go again) has made these unidirectional relationships more common than ever before.

A 2021 study showed the "pandemic-induced reliance on screens to engage with real-life friends may have blurred the cognitive distinctions between real-life friends and liked media personae, thereby strengthening PSRs."

Brands have implemented the same principles as celebrities and influencers who are, increasing, brands with multiple products to sell themselves. By facilitating connections with consumers, brand love grows, along with loyalty and ambassadorship.

While this is not directly related to SaaS consumers, it does mean consumers in general are more open to parasocial relationships, giving industries that are more regulated, technical or specific license to play.

Benefits of a community-led growth approach

It's clear from the above that SaaS consumers are primed for online communities, but the question remains — how will a community-led growth approach benefit your PLG strategy?

These three benefits of a community-led growth approach are common but, the truth is, until you open your brand up to a community, there's really no telling the potential.

1.Create loyalty and advocacy for your brand and product
By creating a community around your brand, you are better able to establish a differentiation point to ultimately grow brand loyalty and, soon after, advocacy. People fall in love with products because they solve a problem in their life, but people fall in love with brands because they have a personality and a set of values and beliefs that resonate with them. By creating a community of like-minded individuals, your brand can really show off its personality.

2. Low cost, low churn acquisition
Make no mistake, establishing, growing, and managing a strong community takes time and the best communities are well-resourced. But the cost often ends there. Most communities live on free or low-cost platforms and do not require your business to spend on a CPM or CPA basis. Think of them as a growth loop — each input creates an output and the cycle continues.

Your community managers will be able to seed your freemium or free trial as a solution to community member's problems, and if you're operating in a hybrid product-led sales model, your sales team will be able to use the forum to identify leads and chat with them right there in the community channel.

Additionally, the individuals who discover your product through the community are more likely to stick around. After all, they're part of a group of people who can offer inspiration and advice on how best to use your product and they have a form in which they can share feedback with you, the brand.

3. Real-time feedback and idea-generation
With a community, you open up a forum for a group of people to ask questions, share solutions, and work through tricky problems together. As the business facilitating this, you and your product are a part of the solution.

Along the way, you'll find plenty of opportunities to solve problems with your product, or build new features from the ground up.

Customer support can also benefit as community members solve each other's problems and can search the community for answers previously provided. By doing this, you'll decrease the number of tickets received and make every answer you've shared go further.

Examples of SaaS community-led growth

In the 2022 Community-Led Report, it was shown that the most common community engagement channels were online events followed by a forum, Slack or Discord channel. Social media platforms, including Facebook groups, and real-life events are, naturally, two other front-runners.

Many product-led brands have made huge strides with their community, tapping into these platforms and letting the community take them where they need to be. Let's take a look...

Notion's ambassador network
In an interview with the SaaStr Podcast Olivia Nottebohm, CRO of Notion, shared how their growth-getting community got started.
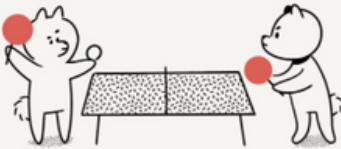
Notion's Marketing Lead Camille Ricketts, "saw that there were a couple of people on Twitter who were very, very vocal about how wonderful Notion was. And she saw this and she realized, 'Okay, this is our community. What do we need to do to embrace these people and bring them in?'"

In exploring this, Notion came across Ben Lang who was running his own Notion fan site and offered him a full-time job as Notion's Head of Community. From there, they aggregated the ambassadors they had around the globe and gave them access to founders and Notion employees, funds if they wanted to secure venues for events, and invited them to share feedback on the product — both in real life and online.

This started a ripple effect — more people who used and loved the product started their own clubs, communities, forums and even their own businesses. One member of the Notion community, Marie Poulin offers a course called Notion Mastery that regularly sells out classes and is endorsed by Ivan Zhao, CEO and Founder of Notion.

Notion Community

We're lucky to have a vibrant, creative community that constantly introduces new people to Notion and helps many more grow their skills. Hailing from around the world, members of our community host virtual events, make videos, build and share Notion setups, teach classes, and so much more — and we're always looking to partner in new ways!

Interested in being a part of Notion's global community? You came to the right place! 🙌

All the ways you can get involved:

- Join a community-hosted group
- Kickstart a Notion community
- Partner with us on YouTube, Instagram or TikTok
- Contribute to Notion's Template Gallery
- Explore events and webinars
- Host an event or webinar

- Translate Notion
- Get and share Notion goodies
- Share your content on social media
- Build a business with Notion
- Make Notion art your backdrop
- Become an ambassador

So, what have Notion done here? Instead of creating strict rules around brand usage, they allow fans around the world to use their brand and make any swag they want. Instead of just sharing or liking content created around their product, they actively encourage and sponsor it. They've created pages for templates, share a calendar of community events on their site, and offer merch to anyone who attends or hosts a webinar. They even offer Notion-inspired art for iPhone and Zoom backgrounds.

This 'go with the flow' example is a great lesson for every brand. Encouraging community means really encouraging it. Not merely sharing, but funding, facilitating, offering access, and really allowing your community to, as Nottebohm says, "tell your story for you."

Figma profiles and templates

Figma was designed for collaboration between teams, but it takes things one step further with the Figma Community, a place where users can access plugins, wireframes, illustrations, icons, and design systems from Figma and its expansive user base.

One of the great things about this model is that it actually gives their community a chance to self-promote, while sharing brand love. Illustrators, designers, and UX professionals create profiles and share their templates with people all over the world, showing off what they can do.
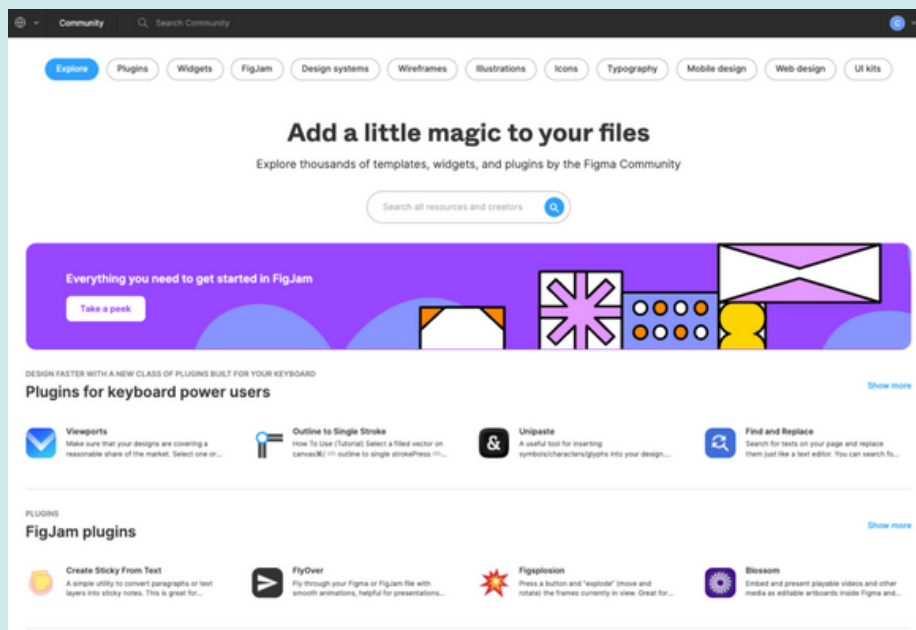
Figma also offers designers, developers, and design systems creators a chance to share their opinions, research or work with the world in their Design Systems digital publication. More than a brand blog, Design Systems is closer to a magazine that offers articles, lessons, and perspectives from industry professionals, as well as a regular newsletter.
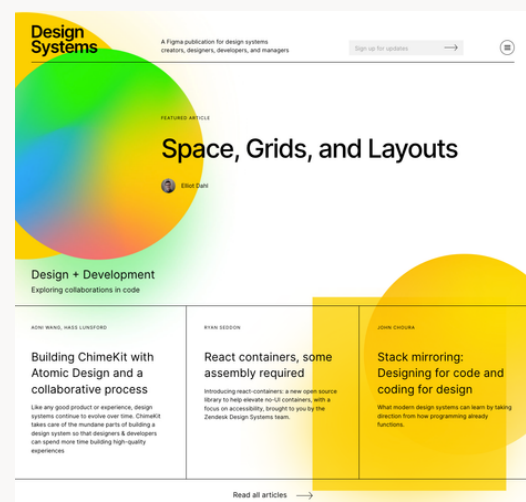
SurferSEO Facebook group and live training

Surfer SEO was ahead of the trend, having created their private Facebook group back in 2017. It's now grown to over 10,000 members and counting, with active discussions about SEO and between SEO experts, entrepreneurs, agency owners, content creators and more.

The Surfer Academy also creates a sense of community with live training sessions happening regularly. Users who sign up to the product and attend or watch at least two training sessions in their first 30 days are incentivized with an extension to their existing money-back guarantee.
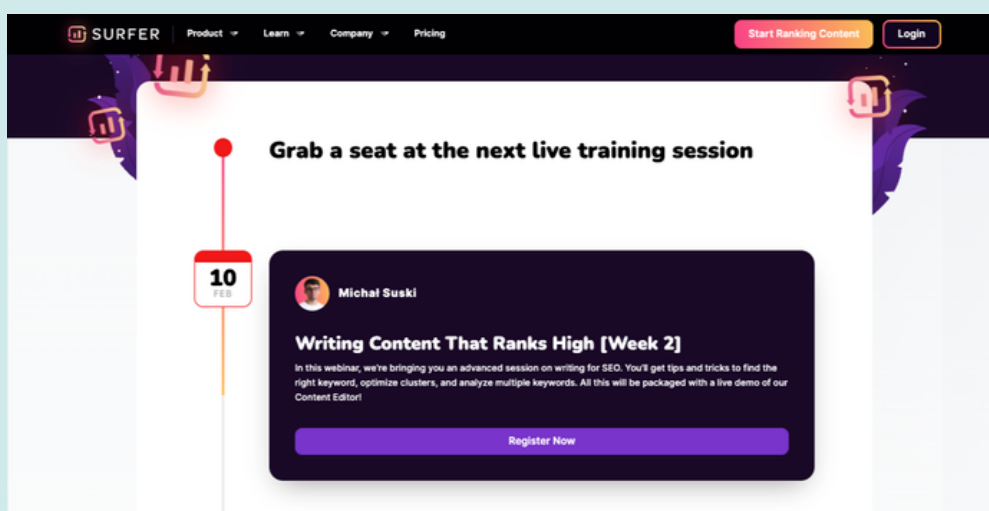
And, finally, Surfer SEO's ambassadors and employees make an effort to show up on existing SEO and content Slack channels to share advice, network, or promote their free and paid tools.

Roam Research's Slack, Twitter, and help pages

Roam Research, a note-taking tool that allows you to organize research and ideas more effectively and efficiently, has a Slack community of over 11,500 members and growing. It's a place where 'Roamans' share their tips, themes, and troubleshoot together.

The fun doesn't end there. On Twitter the #roamcult hashtag helps users keep up to date with updates, a directory of Notable Graphs leads people to public graphs they can contribute their own ideas or research to, and their help section predominantly features articles and videos from Roam users and fans.
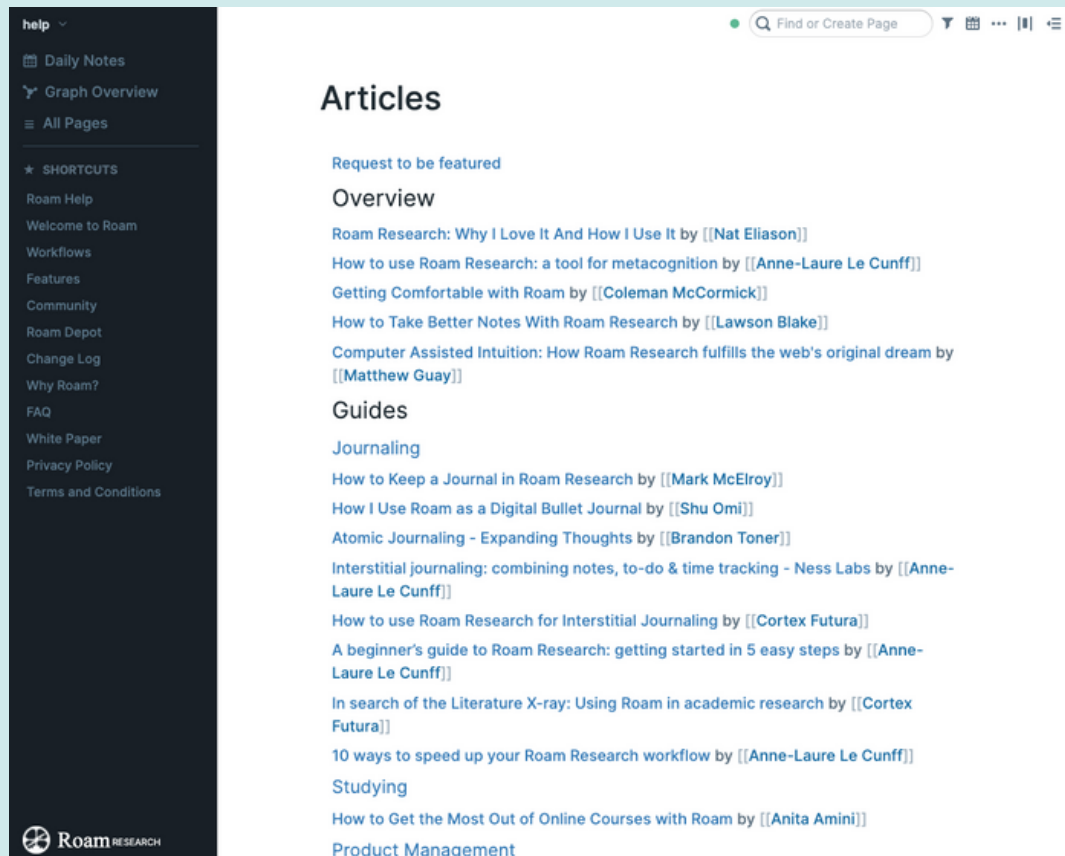
It needs to be said that, in every single one of these examples, there is a very strong product that forms the backbone of the community. These are communities of people who have had an outstanding product experience and have an active desire to learn more about how they can get the most out of it.

Community-led growth strategies

Starting a community will feel daunting because it requires active involvement, one-to-one conversations, personalization, monitoring, and a desire to really test new and different approaches.

The truth is, there's no one step-by-step process to community-led growth (yet). There are several places you may want to start.

- Find your fans

Many more established SaaS products have a fanbase of users or a few individual superusers on Reddit, Twitter, YouTube or another social platform.

If that's the case, it's worth exploring how you could better activate this existing community. In the Notion example above, facilitating these fans with tools, funds, or access was step one, and things snowballed from there.

- **Create a community of practice**

In Greylock Investor Corinne Marie Riley's <u>Medium piece on community-led growth</u>, she mentions a community of practice,

> *"The idea of a community of practice was coined by Anthropologist Jean Lave and educational theorist Etienne Wenger in their book Situated Learning. A community of practice ties together members who share the common goal of learning about a specific field. Applied to the tech world, we've started seeing communities of practice grow significantly."*

For many brands, this community of practice will be a great place to start. Newsletters, events and webinars, templates, or a place that professionals in a specific area can go to troubleshoot or find inspiration. In many ways, the more niche the better. For example, 'Marketing' is far too broad a topic to really bond over, but 'Social Media Marketing' or 'B2B Content Marketing' can bring people together quickly.

- **House or facilitate user-generated content**

In the example above, Figma allows users to share templates on their community hub and articles in a digital publication, while Roam Research links to real users' videos and articles in their help section. Notion actually funds videos created by users if they meet specific requirements.

The thread here is that all these brands are doing more than just sharing UGC — they're actually housing it or facilitating it in a more meaningful way. Not only does this give the creator exposure to a much larger audience and incentivizes others to make similar content, but it also takes the pressure off your content team.

Chapter 9: Reducing Churn

 Essentially, it refers to the rate at which you are losing customers and, while it's not exactly our favorite number to look at, it's crucial to keep a close eye on your churn rate and how things like product updates, feature releases, marketing activities, and customer support impact your churn rate.

In fact, avoidable churn could be costing US businesses in excess of $136 billion a year and reducing churn by just 5% can boost profitability by 75%.

Churn matters. In this chapter, we'll explore what churn is and how to calculate it, the different types of churn, and proven tactics for reducing churn.

Why churn matters

Churn rate impacts all of your other key business metrics like customer lifetime value, retention rate, and total revenue.

Take a look at these stats:

- Acquiring a new customer is 5-25x more expensive than retaining one.
- Improving retention has a 2-4x greater impact on growth than acquisition.
- 44% of companies have a greater focus on customer acquisition vs. only 18% that focus on retention.
- The probability of selling to an existing customer is 60-70%, but only 5-20% for a prospect.
- Existing customers are 50% more likely to try new products and spend 31% more.

A reduction in churn means an increase in customer retention and customer lifetime value, ultimately giving you a more sustainable business model and a higher likelihood that your happy, loyal customers will refer a friend.

Types of churn

There are two main types of churn: voluntary and involuntary.

Involuntary churn occurs when payments are declined or something else goes wrong in the process of renewing.

Voluntary churn occurs when the user decides to end their agreement because they've found a better or more cost-efficient solution or your product is no longer serving their needs. This is the type of churn we'll be focused on here.

Within the broad category of voluntary churn, there are three distinctive phases for a SaaS business:
- Onboarding churn (0-30 days)
- Mid-stage or results phase churn (30 - 180 days)
- Long-term or loyalty phase churn (180+ days)

Early-stage or onboarding churn is by far the most common, but it's also the most avoidable. People who churn in this phase are typically struggling to get set up or haven't yet discovered all of the different features and use cases. In a PLG model, simple customer journeys that educate and support these customers will go a long way to assisting them.

In the Results phase, your customers will be looking to start seeing real value in your product and generating results. Often, making tweaks to the onboarding process can help you avoid this phase of churn — the better customers are set up from the start, the better off they'll be when they're trying to prove ROI or make a case for the value of your product.

In the Loyalty phase, customers who churn may feel as though they are not getting enough out of your product and they could require a little extra support to help them experience the benefits firsthand.

We'll get into some churn-busting strategies for each phase at the end of this chapter. But first, we'll look at some of the ways you can calculate and monitor churn, to find out which phase is impacting your business the most.

Calculating and monitoring churn

The basic formula to calculate your business's overall churn rate is simple — number of customers canceling their subscription per time interval, divided by the number of customers at the beginning of that interval.

Many SaaS companies may also benefit from tracking subscription level or downgrade churn — that is, the number of customers who downgrade their plan. Depending on the pricing model you've put in place, this kind of churn could be indicative of a feature that's not quite working, a usage level that is far and above what your customer really needs, or something else entirely.

In a customer data platform like Ortto, it may be worth setting up an entire dashboard dedicated to churn to answer tough questions like:

- What type of customer is likely to churn?
- Are there any product actions that customers do or do not take before churning?
- How do engagement scores look for customers that churn?
- Which pricing tier was the customer most likely to be in when they churn?
- Are there seasonal churn trends that could be eliminated with special offers or discounts?
- Does churn happen at a specific time in the customer's lifecycle? E.g. at the end of an annual contract?
- Is the churn voluntary or involuntary (e.g. declined payment cards, incorrect payment information or lack of customer assistance)?

Answering these questions with an in-depth churn analysis can help you set up a plan to reduce churn, and set your business up for long-term success.

9 strategies for reducing churn

Now that you're analyzing churn, it's time to take action and bring those churn numbers down. ProfitWell studies have shown that the average churn rate in SaaS is around 5%, and a "good" churn rate is considered 3% or less, but only one-third of SaaS companies are actually hitting this benchmark.

No matter what your churn rate is, the important thing is to make continuous improvements to lower it. These strategies are designed to do just that.

1. Make your product a habit

We all know that starting a new habit is easier said than done. But it CAN be done. Products like Headspace, Asana and Slack work well because they encourage us to log in every single day. And when a product becomes part of your daily routine, it's really only those inevitable things like budget constraints or changing circumstances that drive you to cancel.

Consider how your product can become a part of your user's routine. It could be as simple as emailing your customers with a weekly update on their progress or using integrations to essentially habit stack with their daily usage of popular products like Slack.

2. Focus on onboarding

We've said it before and we'll say it again — a stellar onboarding process is absolutely crucial to success. In fact, 80% of all app users are likely to churn within the first three months of signing up.

You've likely heard that it takes 21 days to build a habit but, in fact, in a 2009 study published by the European Journal of Social Psychology, it takes on average 66 days for a new behavior to become automatic, and anywhere between 18 to 254 days for a person to form a new habit. This is largely dependent on the type of habit — and the type of person. In any case, it's clear the first 90 days are crucial to minimizing churn risk.

Assess timing in your churn analysis and consider how your onboarding process could play a role in that crucial 90-day window. Using a CDP and marketing automation tool like Ortto will help you get a single view of your customer journey to ensure that every step in the process is accounted for.

3. Play with pricing

As a user, you've probably noticed a lot of companies offering up huge (up to 25%) discounts for signing up for an annual subscription. There's a reason for this — once a product has been a part of a user's life for 12 months, it's highly likely that they're going to struggle to give it up.

After all, 365 days is far beyond the maximum of 254 days it can take for a new behavior to become automatic — and once your product enters 'automatic' territory, churn is far less of a risk.

4. Overcome alignment issues

Sometimes early-stage churn starts before the customer has even become a customer. If your marketing, advertising and website messaging does not match up to the product experience, your customer may churn because their expectations have not been met.

This is rarely intentional, but it is more common than you may think, especially for products that are complicated and could be misunderstood in the market. Aim for simple, straightforward messaging explaining what you solve and how you solve it. Videos, product imagery, and customer stories can help here.

Another way to avoid alignment issues is to find out what customers are expecting in the first place. Set up an onboarding survey or pop-up form that prompts your customers to share the features they are anticipating using heavily, and what they are hoping to achieve with the product. With this information, you can segment the audience and start sending them the most relevant educational content to fast-track their success.

5. Test different educational tools

Perhaps you've gone all-in on video tutorials. Or maybe you've been reliant on written content and a few pre-recorded demo videos. The fact is, different people learn in different ways and while you can make some predictions about your audience's preferred way to learn, the more content types you have, the closer you'll get to ensuring every customer you have will find a way to reach their goals.

It's also worth looking at pop-ups, tooltips, product tours, and even gifs to help users learn as they do. This is often the most effective way to teach your users about new features or hard-to-master features.

6. Build reengagement campaigns

Tracking engagement in a CDP like Ortto will help you catch churn before it happens. When a customer stops using specific features, drops from using the product once a day, to once a week, to once a month, or usage at the organization level drops down to one specific individual, it's time to funnel the customer into a re-engagement campaign.

Often, the best place to start is with the customer. Ask for feedback, find out why their product usage has dropped off, and offer some help. With this information, you can ensure they get the right kind of support.

It's a good idea to educate these customers on new or lesser-known features to ensure they're seeing the full value of the product and to share some customer stories and specific use cases that may inspire them to reengage with your product.

7. Celebrate milestones

Spotify's Wrapped is known for being one of the more viral content efforts of the calendar year. Social shares aside, it also happens to be a great reminder of the role Spotify plays in our life. We listened to THAT much music?! Learned from THAT many podcasts?! If anyone was doubting their loyalty to the platform, they'd be reconsidering after that Wrapped email hits their inbox.

Consider how your product could create something similar at key moments throughout the customer's lifecycle. Maybe they've been with you for three months and you want to show them how much time they've saved or revenue they've generated. Or perhaps it's week one and they've already integrated their tech stack. Whatever and whenever these milestones occur, find ways to celebrate them and guide your customers on to the next step.

8. Share content consistently

Keeping engagement high doesn't stop with in-product engagement. Blogs and newsletters provide extra value to your customers and inspire them to keep growing with you. Focus on adding real value, providing examples, explainers, and how-tos rather than hard-sell content. When your brand becomes a part of your customer's life, they're less likely to churn.

9. Identify at-risk customers with NPS surveys

Tracking your Net Promoter Score (NPS) helps you to identify the customers who may be at risk of churning and will provide a steady stream of feedback that can inform product improvements and updates.

When you encounter a less-than-positive review, ask follow-up questions to home in on the problems and solutions, and ensure that your support team is reaching out to respond to the issues and help resolve them.

Remember, track every change, measure success, and implement learnings to lower your churn rate now and in the future. Churn happens, but consistently improving your product, marketing, and messaging can significantly reduce its impact and help the overall health of your business.

Measuring success and the future for product-led growth

Chapter 10: Metrics that matter

When you're just starting out with a product-led growth strategy, you're going to need to have a degree of flexibility in your approach and adapt a test-and-learn philosophy. Those lessons learned will help you perfect your pricing tiers, master your marketing messages, and create a product that truly grows itself.

But, as they say, if you can't measure it, you can't improve it.

So whether your KPIs are hard and fast or soft and slow, measurement is the key to learning, testing, and improving. In this chapter, we'll outline the metrics to track and learn from now and into the future.

Financial metrics

Monthly recurring revenue (MRR)
A SaaS mainstay, MRR will show the total revenue your clients bring in from your monthly subscription. It's also important to note, other company revenue streams such as training products or professional services are generally excluded from MRR. If your company offers a variety of price plans and billing periods, the MRR metric provides an average of the above, helping you to track the trend over time.

Customer lifetime value (CLV) / Lifetime value (LTV)
CLV and LTV can be used interchangeably. Knowing your CLV/LTV will allow you to see the estimated total revenue generated over a client's lifecycle. The CLV/LTV will allow you to make better decisions around your marketing costs and identify the best SaaS marketing channel to fit your customer.

Average revenue per user (ARPU)
This SaaS metric shows the profitability of your product by seeing the amount of revenue generated per client or subscriber. This will provide an easy way to track the continuous annual growth of your company.

Expansion revenue

Measure the revenue that is generated from existing customers who are upgrading or purchasing add-ons, new features, additional space or more user seats. How you track this will largely depend on the pricing model you have in place, but it's crucial to have an understanding of the revenue you're generating from expansion and what percentage of total revenue this makes up. The higher the percentage, the better — after all, expansion generally requires less sales and marketing power, and results in more loyal customers.

Churn

Churn is summarized as the rate at which customers cancel their recurring subscriptions over a specific time period. It's the metric needed to work out the health and stickiness of the product. The higher the churn, the more your team needs to work on retention. Churn is presented as a percentage. For example, Company A has a churn rate of 30%, indicating that 30 out of 100 subscribers have canceled their subscription, over a given period of time.

Some churn is inevitable, and it may help to track additional metrics like net revenue churn when operating in a SaaS PLG environment — this will show you the amount of money lost from churn, after accounting for the revenue you've gained from new or reactivated users, or expansion tactics.

Product metrics

Free-to-paid conversion rate

In a product-led growth model, a free trial or freemium version of your product is essential to growth and the onboarding experience for customers on your free plan will play a major role in this metric. If you have both a freemium model and a free trial of a premium offering (like Ortto does), you'll want to track both freemium to free trial and free trial to paid conversion rates.

There are two types of free trials: opt-in free trials where the customer can start without a credit card or opt-out free trials where the customer needs to share payment details and will be charged at the end of the free trial if they do not opt-out. Since Ortto has both a freemium (opt-in) product, our premium tier free trial is an opt-out trial.

For products without a freemium tier, opt-in is usually the go-to, but it's worth testing both to see how your conversion rate changes.

Feature adoption rate

In addition to product adoption rate, it's worth tracking the adoption of different features within your product to spot opportunities for optimization.

There are several ways this will need to be tracked. For example, a customer encountered a feature but did not use it, a customer interacted with a feature one time but did not use it again, or a customer used the feature at least two times. It may also be worth tracking — through customer surveys — whether any features were encountered within your onboarding process, but the customer did not understand how it works or what it does.

Customer satisfaction

Take a look at how many support tickets are logged through the onboarding process to ensure customers are not encountering too many issues along the way, or to spot the most common themes and get ahead of them with an additional pop-up, email, or chatbot.

Customer satisfaction surveys can also be a great way of getting a gut-check from your customers at the end of their free trial. Even if they do not decide to stick with your product, their feedback can help you fix issues within your onboarding process or you could get a support representative on board to help your customer navigate any issues they faced.

Onboarding and product-qualified leads

Product-qualified leads

We'll assume you read the chapter on PQLs and keep this one short. Product-qualified leads are the leads who have experienced their 'aha moment'.

Time to value (TTV) or time to PQL

Value is the moment the customer sees the value of your product in their business context, it's the 'aha moment' we keep talking about. You will want to measure the time it takes for new users to get there to get a sense of whether you may need to extend your free trial period or provide more support at a certain point of the journey. The sooner your customer realizes their first-time value, the better. That said, most customers understand that some products take longer than others — TTV in Asana will never be as fast as TTV in Slack.

Onboarding completion rate

Completion rate will tell you how many of your customers make it through the entire process of onboarding, while customer progress will help you identify where your onboarding process needs improvement.

Onboarding customer progress

Onboarding happens in phases and, within those phases, there will be individual steps that are
taken. In order to optimize your onboarding process, you'll want to keep an eye on the customers that don't convert and find out where they are dropping off in the onboarding process.

In a tool like Ortto, you can track specific actions to get a clear understanding of which parts of your onboarding process are causing drop-offs and which are generating the most engagement. You can also see which onboarding steps lapsed customers did or did not take before they lost interest.

PQL rate

This is the percentage of new sign-ups that reach PQL status in a given time period. Let's say you get 250 sign-ups, but only 25 become a PQL within a month. That means your PQL Rate is 10% and you probably have some work to do to ensure your marketing messages and product experience are matching up, your onboarding and activation process is easy to understand, and your customer journey is guiding users to their 'aha moment'.

PQL conversion rate

To calculate your PQL conversion rate, you'll want to look at the total number of PQLs that converted to a paid model, divided by the total number of PQLs. If this number is not favorable, take another look at the workflow you've put together for your PQLs and see how it could be improved upon. If it is consistently low, you may want to take another look at how you've defined your PQL and whether that product-qualifying action is still relevant to your product experience.

Chapter 10:
The future for PLG

Product-led growth is a team sport — it requires every person in every department to be focused on the product and how it can support customer acquisition, retention and expansion. When this happens, the product can truly become the growth engine you want it to be.

Over the next year, we'll see more SaaS businesses adopt a product-led sales approach, catering to a larger pool of customers and servicing every business size and type.

"One of the SaaS trends that we're seeing in 2022 is a move to a blend of product-led and sales-led growth strategies," Alastair Simpson, Head of Strategy at Coassemble shared with Ortto in our 2022 SaaS Trends wrap.

"In the last few years, we've seen SaaS businesses classed as fully product-led, like Monday, or sales-led, like Gong. But we're starting to see businesses move to blended models; product-led businesses are adding sales teams to monetize their users, and sales-led organizations are looking to product-led strategies to get their product in front of more people."

"The ones that get this right will leverage their product-led strengths, using their rich product data to inform sales teams of the ideal time to reach out to prospects. To ensure success, we'll be doubling down on tools that let us access richer customer data and use that data to drive customer behaviors. We'll be spending more time in tools like Ortto." Simpson shares.

In addition, there will be an increased focus on product experience. "Product-led growth (PLG) has taken the SaaS world by storm over the last few years," Eric Keating, VP Marketing at Appcues shared. "We're all so busy standing up free trials that we forget why we're even doing it: the way people want to buy and use software has changed—dramatically."

> *"Today's users expect self-service, frictionless, personalized, and instantly gratifying experiences—and you only have a few minutes to prove to a new user that your product can deliver that. Offering a self-service free trial is a great start (89% of buyers won't even shortlist vendors without one), but it's the quality of your product experience that will make or break your SaaS business. If it falls short, you're out of luck. Your prospects have more options than ever."*
>
> -Eric Keating, VP Marketing at Appcues

Product design plays an important role in delivering that incredible experience. As Kentaro Kawamori, CEO and Co-Founder of climate management and accounting platform Persefoni shared, this shift in focus will "reset how founders and VCs have been thinking about the ratio of engineers to product designers. Whereas in the past people looked at this as a hard and fast rule to follow, there will be product areas and instances where the ratio of designer to engineer will be much lower than historically."

"The benefits are significantly increased user experience and journeys which can reduce onboarding, training, and support cost for customer service teams, but the downside is increasing R&D costs that will warrant quicker return periods on those headcount investments."

Product-led growth isn't going anywhere, in fact it is becoming such a mainstay that it has become almost synonymous with SaaS growth.

If this scares you, ask yourself. Why did you create your product in the first place? It was built to serve a need, to fill a gap. When your product really can serve that need, fill that gap, it sells itself.

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