INTERCOM ON CUSTOMER ENGAGEMENT

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Intercom on Customer Engagement

If you want happier, more active users of your app, customer engagement is the way to make it happen. This book gives actionable frameworks to help you drastically improve customer engagement and grow your business.

If you'd like to read more, we regularly share our thoughts on messaging, marketing, product management, startups and more on our blog, Inside Intercom.

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Foreword

Like most software companies, in the early years of Intercom we had two big problems. Firstly, people were signing up and not using the product. Secondly, the ones who were using the product weren't doing everything we wanted them to do. The only way we knew that we could count on the user sticking around was if they were actually using and getting value from what we'd built.

So I spent about 20-25% of my week talking with customers learning who they were, what their product does, where they were based, how often they use Intercom, how they found us, what they love, where they want to see improvements etc. It wasn't rocket science. If you were a chef wondering if customers are enjoying your new soup recipe, how would you find out? You'd probably just ask them.

Communicating with customers sounds simple, but it doesn't come easy for many businesses today. There are some really big, extraordinarily successful software companies that have never made a single attempt to reach out to their users. And I'm a customer of a lot of them. They've never tried to get me to appreciate their product in any way, they've never told me about their new features, they've never checked in to see how I find their product. There's a mindset that the internet is the infinite scale, zero cost tool, and god forbid you should ever have to talk to a customer.

On the opposite side of the spectrum, there are companies that communicate way too much. They send you an email about every trivial thing. "Congratulations, you've created an account," followed by a series of 14 emails about meaningless activities until you just tune out. In the same way that there's a limited amount of times you can impose yourself on somebody in the real world, you can't send out an email blast every time you have something to say. There needs to be a sense of priority and understanding of what's important to the user. (This is something we deliberately tried to tackle last year with our Smart Campaigns feature).

Customer communication tends towards extremes: it can be too little, too much, too late. Or it can be just right. In this book, we've outlined strategies that will make sure every message you send will land at the right place, at the right time, and in an appropriate medium. It sounds simple, but as long as you're sending well-timed, considerate emails that speak to your user's interests, you can't go too wrong.

Des, Co-Founder and CSO, Intercom

Introduction

Remember those halcyon days when software was sold through licenses and you only had to win over each customer once to stay profitable? Those days are over. In a world of subscription based software and recurring revenue, you have to win over your customers month after month just to keep the lights on.

This isn't an idle warning but a very real issue that SaaS companies have to deal with on a daily basis: "Are my customers using my product? If not, what's to stop them leaving at the end of the month?"

To ward off this threat, businesses are realizing they need engaged customers if they are to grow a healthy, sustainable business. Just ask Snapchat. Their $20 billion valuation was largely built around almost a whole generation of people signing into their product multiple times every day.

So what is customer engagement, you ask? We define customer engagement as:

Communicating with your customers over the course of their lifecycle to help them get to the outcome that they want.

Or to put it even more simply, sending the right messages, to the right people, at the right time and place, to help them get to a desired outcome.

This sounds quite straightforward, right? Well, not so fast. The definition of an "engaged customer" varies from product to product.

For a to-do app an engaged user should be logging in every day to add and complete items, whereas for an invoicing app an engaged user might only log in once per month. There is no consistent quantifiable definition of engagement across different products.

This book is our guide to helping you understand what engagement means for your business, and the necessary steps required to engage them. You'll learn:

- how to define the audience for your messages by segmenting users according to behavior and action.
- crafting your messages for maximum impact; what voice, tone, format, and language to use.
- the right way and the right time for a message; what you can do to ensure it is received in the most appropriate setting and in the most appropriate context.

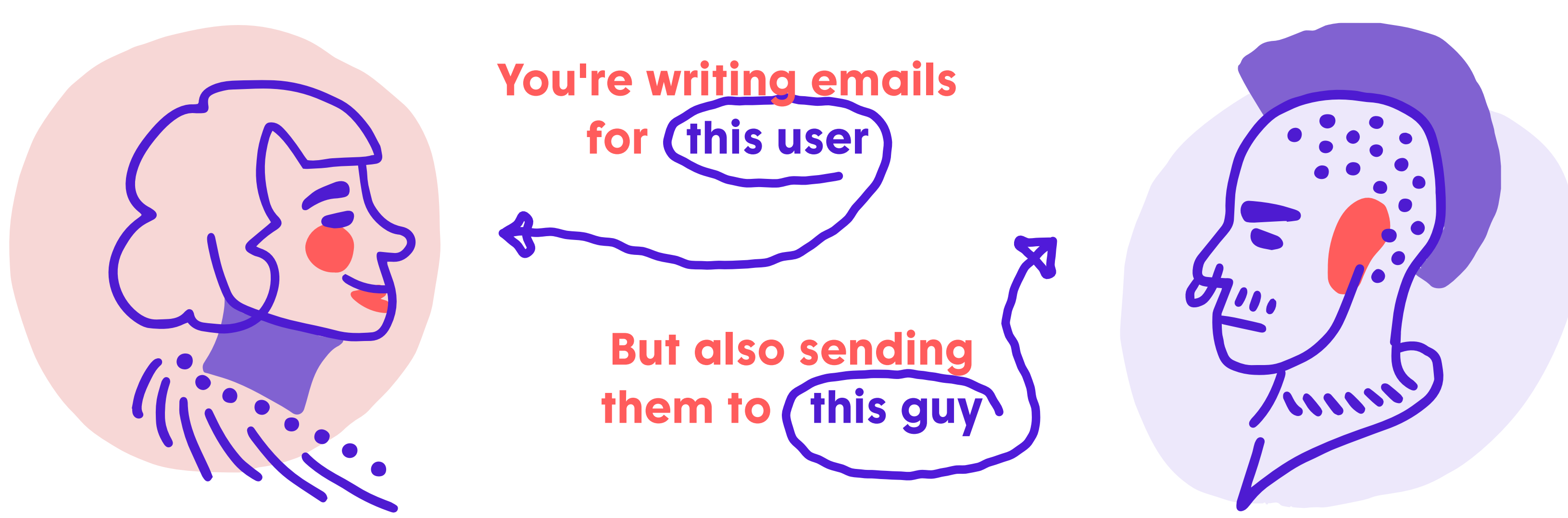
Many books assume that you have a large, established team and lots of money. This is not one of those books. Most of our advice is absurdly simple, and requires nothing more than a few hours, a whiteboard, and a product to send messages with. (We're obviously biased and think Intercom is the best way to engage your customers but our advice remains the same regardless of the tool you're using).

Ready to get started? Let's dive in.

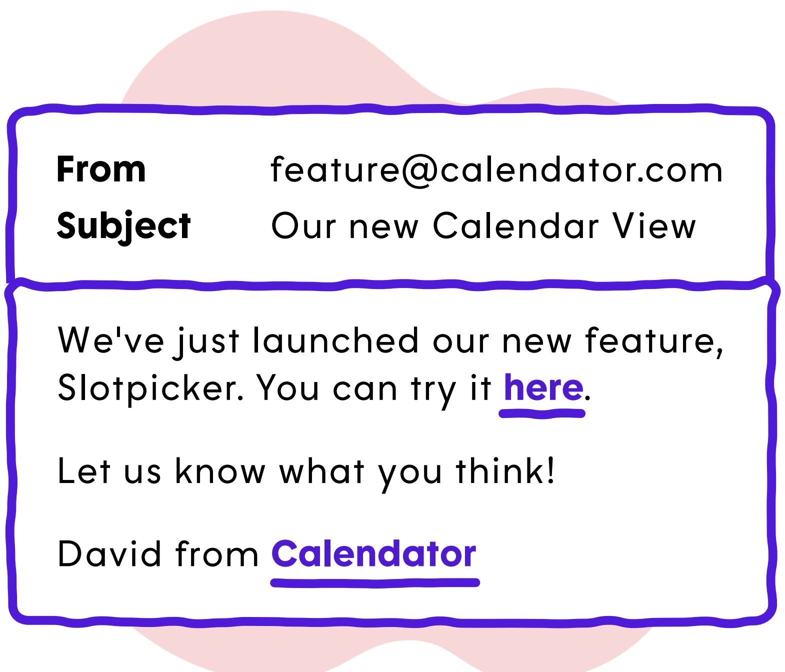
The Right People

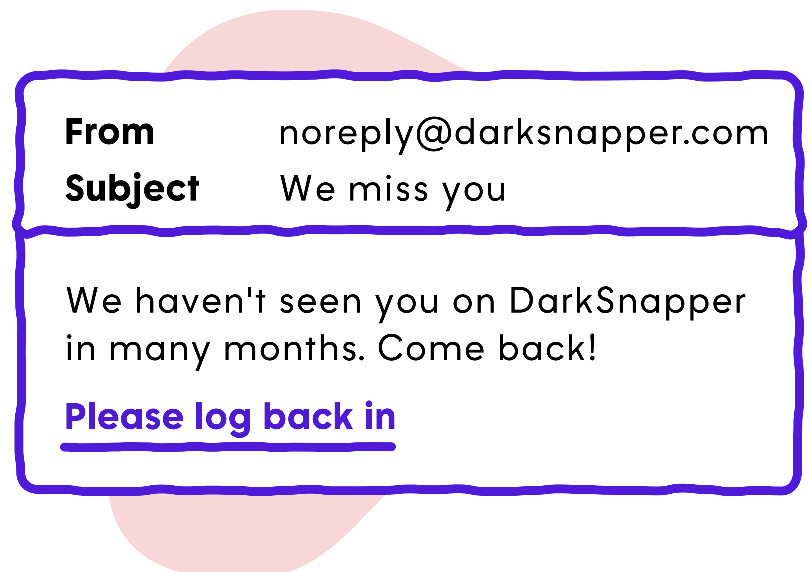
Communicating with your entire user base all at once is like writing a love letter and then addressing it "to whom it may concern". No matter how compelling the body of the message is, the damage has already been done. You've already shown that you see them as one homogeneous blob, not the humans they are.

Messages that don't consider their recipient will fail. It follows that the more precise you are in the targeting of your message, the more successful it will be. Defining and targeting the right users is the foundation of a successful messaging strategy.



The beauty of SaaS products is that they are easy to sign up for and try. As a result, every week you receive at least one message from a company you know nothing about, telling you about some feature you don't understand, because you have no idea what the product or company does. Here's a selection we've received recently from companies we didn't even recognize:





In the same way it's bad to measure customer behavior based on an average conversion rate, it's bad to write emails for the mythical "average user". Remember that the "average" person has 1.96 legs and 9.7 fingers, and you don't know too many people like that. Write for people, not for averages, and your messages will perform much better.

Simple segmentation for better messaging

Segmentation is when you group people based on certain shared characteristics in order to customize your messages, and it's the not-so-secret key to your customer engagement strategy. By narrowing your focus and sending messages to targeted groups, your recipients will find your messages much more relevant. And relevant messages get better results.

Here are some segments every product should consider.

ENGAGED USERS

These are the users regularly logging into your product and using it. The exact parameters you use to define this segment will depend on the nature of your product. For example, if you run an invoice generation app, your active users might only log in once a month and create a small number of invoices. If you're building a consumer photo sharing app, you probably need to see a lot more activity in terms of sessions, likes and shares, and you might want a significant amount of photos uploaded, before deeming users to be highly engaged.

Engaged users are your regular customers. They're loyal and depend on or enjoy your product often, so treat them accordingly. Don't sell them a product they've already bought. Don't promote features they've already used. Don't pitch them things they can't use. Instead, focus on things you think they should try, know or master.

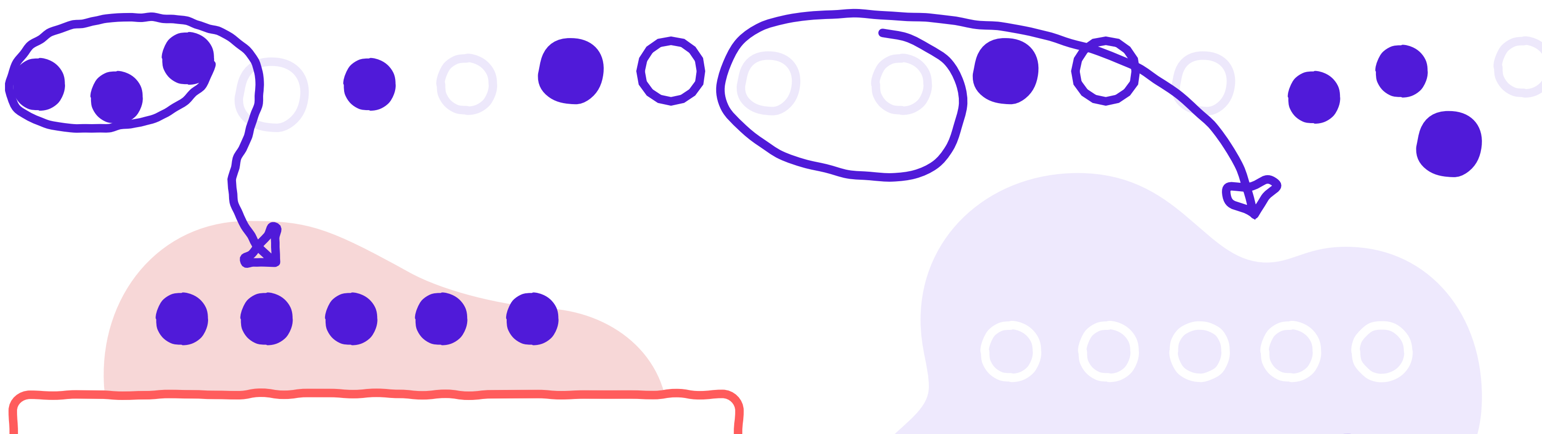
INACTIVE OR DISENGAGED USERS

These are the users who have not used your product in a meaningful way for a certain amount of time. This is entirely natural for most SaaS businesses. People get curious, kick the tires, shrug their shoulders and leave without saying goodbye.

These users should be handled delicately. They probably remember your name and have a vague idea what your product does, but their impressions are likely out-of-date, and you've (hopefully) improved a lot since they last saw you. You need to focus on what your product can do for them, what news you have and why they should check up on you again. False assumptions or false familiarity here is a guaranteed fast track to the trash folder.

You can take this further: your disengaged users aren't all the same either. Some were once power users, while others were using your product for only a few days. Some added their team, some never finished onboarding. Segment accordingly and the effectiveness of your messages will improve.

DON'T ASSUME ALL YOUR USERS ARE EQUAL



WHEN MESSAGING ACTIVE USERS

Consider the appropriate channel

Target messages based on usage

Assume familiarity with your product

Motivate new engagements or upgrades

WHEN MESSAGING INACTIVE USERS

Introduce yourself

Explain what your product does

Explain why you're mailing

Motivate a reconsideration

FREE

Over the past decade "freemium" has become the dominant business model among SaaS businesses. The goal of freemium is to attract new paying users, so your messaging strategy should be based around getting people to upgrade. The trick is to discover when a customer is displaying signs they are getting value out of your free plan and clearly articulate the value the customer will get from a premium one.

Free users can be a valuable source for product feedback, bug reporting and beta testing new features. But with no skin in the game, the opinions of free customers carry much less weight than those of paying customers.

PREMIUM

Customers paying you a lot of money deserve to be treated differently than those on free or $9 a month plans. Depending on your business model you may want to further segment your paying customers. After all it doesn't make sense to send a new feature announcement to customers on a plan that doesn't entitle them to use it.

A far better approach is to craft a message to users on your basic plan explaining what the feature can do for them and why they might want to consider upgrading to premium to get it.

If you're offering free tickets to an event, sending out swag or hosting office hours for customers, you might want to offer it to your highest paying customers first.

SLIPPING AWAY

Customers don't make a snap decision to stop using a product unless things have really gone wrong. Typically customers gradually stop using products. First they go from using it every morning to every week, then to once a month, until they are in "cancel the subscription" territory. This is your "slipping away" cohort, and we define it as anyone who hasn't been active in 30 days or more.

A $99 B2B SaaS app will define engagement very differently to an eCommerce website, but 30 days of inactivity is a useful proxy for customers most at risk of churning.

Your messaging should be focused on showing them the improvements you have made since the last time they used your product. You are trying to convince them your product offers significantly more value now than when they last used it.

RECENTLY CANCELLED

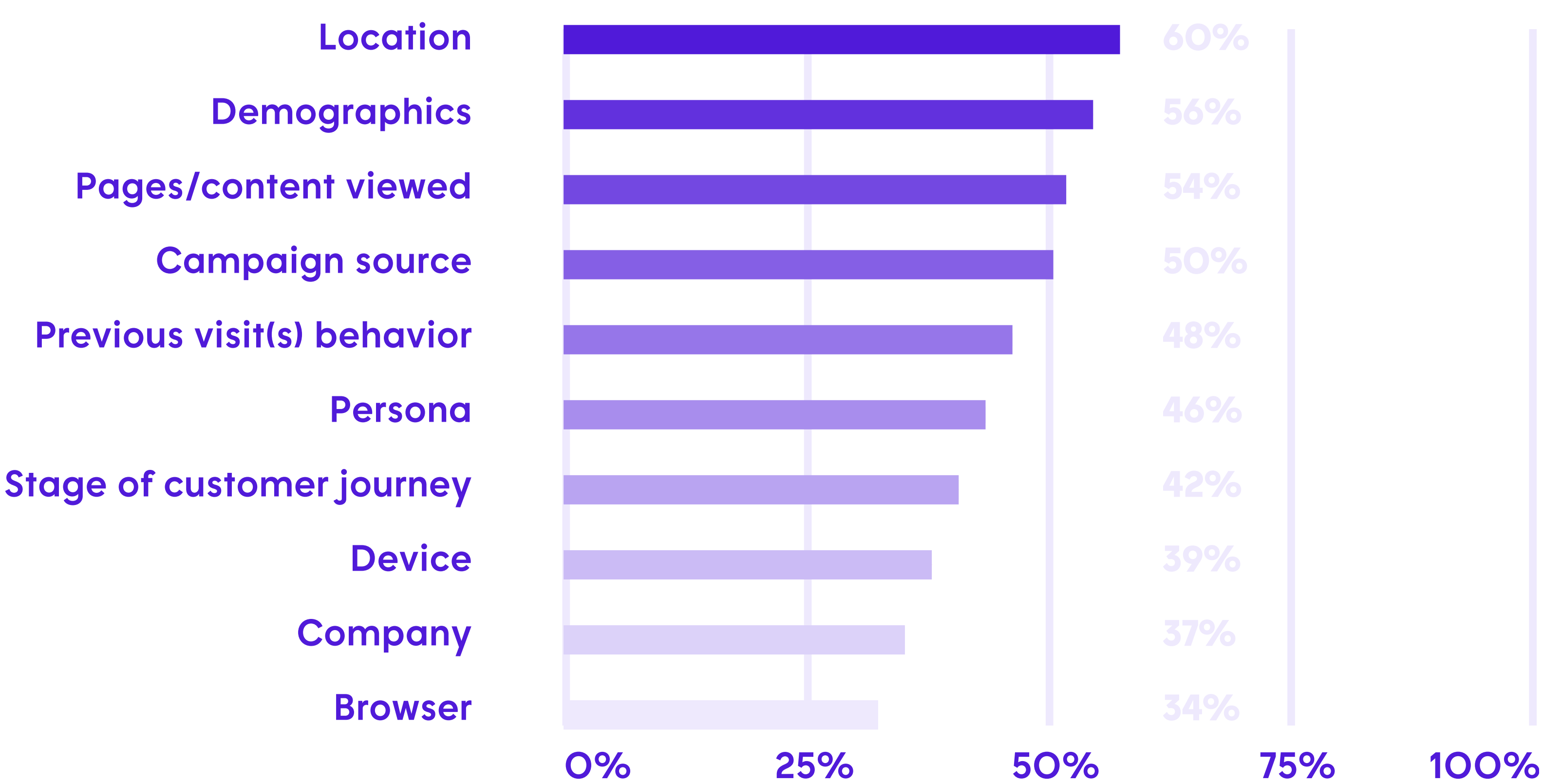
The key piece of information you want from this group is *why* they cancelled. You may not be able to change their mind even if you address the issues they raise, but at least you can prevent it being a deal breaker for other users. And no matter how much you want to convince them how great your product or service is, the best time to do that is probably not immediately after they have cancelled their account.

The segmentation possibilities for customer engagement are many and range from simple to sophisticated. It all comes down to your messaging goals, the data you have associated with your users, and the creativity and hypotheses you have about that data. The above segments are the simple building blocks of your customer engagement strategy, but if you want to deliver messages that are *truly personal*, it is possible to get even more granular. You can start tailoring your messages to individuals, not just groups who share similar attributes.

Matching messages to behavior

Message personalization is often used to describe tactics like putting a customer's name in the subject line of an email, or adjusting the send time to the user's location. Personalization has become a buzzword in the marketing industry, but in most cases what's being used is easily captured demographic and geographic data.

DATA BEING USED FOR PERSONALIZATION



SOURCE: EVERGAGE 2017

True personalization is about so much more than static identity attributes. It's about understanding the behavior of people in your product, and tailoring your messaging around that.

Let's use an example. Say your product is a dating website. You know that if someone doesn't upload their photo they stand a very poor chance of generating any romantic inquiries. Crafting an email around getting people to do that one particular step is a very, very good idea. Messaging personalization really comes to life when you use this real-time behavioral data.

This is all quite straightforward when you're thinking about a single message. But as your company starts to scale, and more and more people start using your product, the number of behaviors grows exponentially. Some people will have exhibited all the right behaviors by day 3 while others will still be dragging their heels at day 21. When you try to devise a messaging strategy that tries to cater to all these different behaviors, things gets complex, fast.

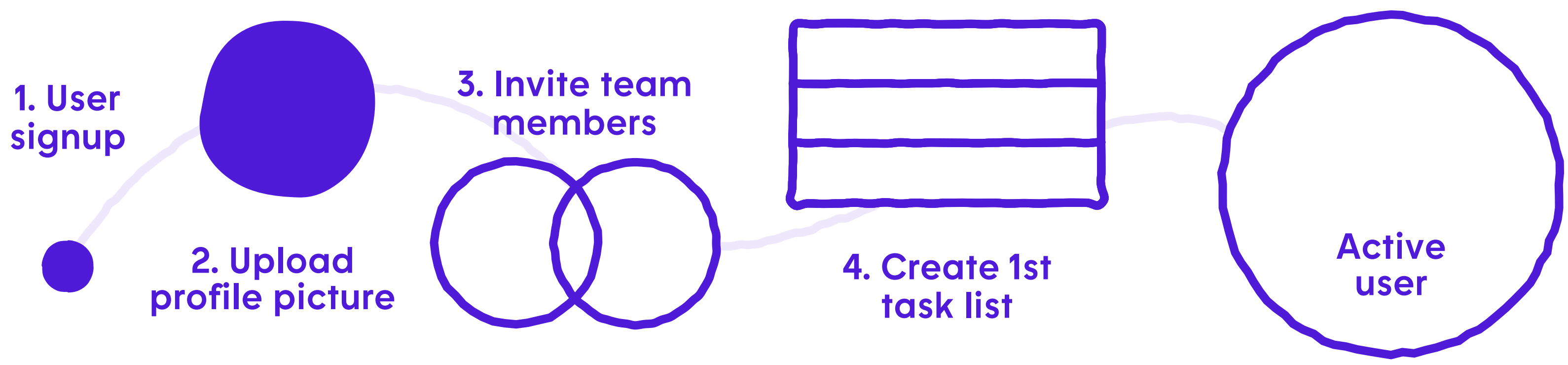
Here's our best practice advice to getting behavior-based messaging right.

DECIDE WHAT ACTIONS WARRANT A MESSAGE

Not all actions are created equal. It's up to you to figure out what actions the user takes (or doesn't take) that are worthy of sending a message. For Intercom, the important actions might be sending an auto-message or importing custom data. For your product, it could be creating a project or adding 5 teammates.

If you're unsure what these important actions look like, start by defining your ideal end state: What does a successful customer look like? What are they doing in your product? These are the actions you need to encourage in your product.

DEFINE THE MOST IMPORTANT ACTIONS IN YOUR PRODUCT



PRIORITIZE YOUR MESSAGES

You see mistakes happening here all the time. Like when you sign up for that cool productivity app on Product Hunt, invite your first teammate, create your first to-do list, upload your first file all in the space of 30 minutes. Like a configuration of falling dominoes, a series of messages hits your inbox in a predetermined order until they run out, and you unsubscribe. Does it make sense to attack a new user's inbox with messages for every single action they take? Of course it doesn't.

Event-triggered drip campaigns get this wrong all the time. They struggle to adapt to how different customers use your product in different ways and fail to take into account that people don't behave in straight lines, from point A to B to C. To avoid this, make sure you have a clear priority for your behavior-based messages. We also recommend leaving at least 2 days between each message to avoid overwhelming your users.

IT'S NOT JUST ABOUT FEATURE USAGE DATA

Having data around the actions people take in your product is amongst the powerful you can have. But it only tells one part of the story. To deliver meaningful 1:1 personalization at scale, you need to leverage the many context signals at your disposal.

Let’s say you own a collaboration app and a customer has taken one of your product’s most important actions: they’ve completed their first project. A perfectly adequate message to send here would be “Congratulations on setting up your first project - keep it up.” But we think you can do better.

Ask yourself: What else do we know about this customer?

- » Have they opened previous messages?
- » Have they visited the knowledge base before?
- » What size company are they from?
- » Have they opted out of marketing communications?

The above are but a handful of signals that, along with usage data, can help us deliver messages that are laser-focused in their accuracy. For example, if you’re speaking to a high-value customer who has contacted customer support several times already this month, your message will have to reflect that.

Segmenting your userbase correctly is at the core of a sound – and scalable – customer engagement strategy. The idea of a “spray and pray” messaging strategy is ancient history, whether you’re a startup just hitting your stride or a large company swimming in inbound inquiries. The good news is that once you’ve properly segmented your audience, writing the perfect message becomes much easier. And that’s what we’ll look at next.

The Right Message

When was the last time you got a message from a business that you actually enjoyed? There are likely not many memorable ones. In the hands of lawyers, executives and HR departments, business communication has been diluted to buzzwords and vapid expressions. Words are treated as an afterthought, the primary objective being to offend nobody. Harsh? Maybe. True? Take a look in your inbox, and we think you'll agree.

If you work at a fast-growing startup, improving your writing might look like a tedious or even frivolous exercise. But knowing how to fashion an interesting and intelligent message is essential to communicating effectively, and ultimately growing your business.

Guidelines for writing messages

Regardless of the type of message you are sending, there are some fundamental characteristics every message should have.

1. GET TO THE POINT

When you get to the point quickly, your messaging becomes instantly clearer. Clarity makes your writing easier to understand, easier to retain, and more enjoyable to read. All of that makes your readers happy.

Richard Lanham, author of the classic text *Revising Prose*, calls it the “lard factor”. These are the unnecessary words in a sentence that aren’t doing a job, have the tendency to confuse rather than explain, and generally get in the way of your message.

According to Lanham, “Business prose ought to be verb-dominated prose, lining up actor, action and object in a causal chain, and lining them up fast”. Or put even simpler, business communications should be action-oriented, clear about what action it wants to take place, and quickly explain what that is.

Obtuse marketing language is far less effective than directly telling people things like:

- What improvements you’ve made to your product, e.g. “It’s now 20% faster.”
- Piquing their interest by telling them about their account, e.g. “Since you last logged in 5 of your friends have signed up.”
- Offering them an incentive to come back, e.g. “Give us another try and we’ll knock 25% off your bill for the next 3 months.”

2. ADOPT A PERSONAL TONE

We’ve all become experts at ignoring messages that aren’t meant specifically for us. In the same way that banner blindness has trained us to ignore animated ads and over-designed pop-ups, generic, impersonal emails don't get much of our attention either.

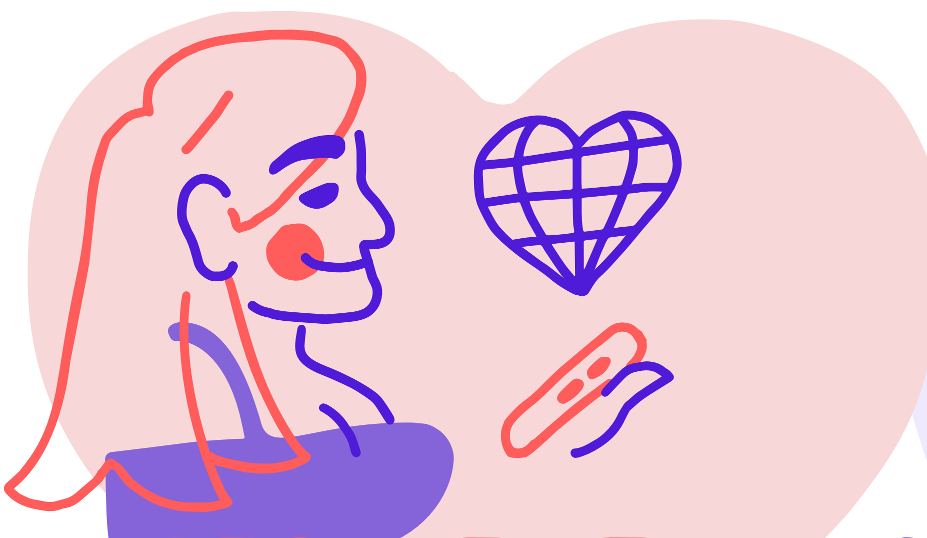
To keep things personal, address people by their name. We've all been annoyed when we received a message from a business we've been dealing with for a long time and it opens "Dear Sir/Madam". At Intercom we start most of our messages "Hi <first name>" which falls back to "Hi there", if for some reason we don't have their name.

The message style is also important. Consider how you treat a plain text email sent from an actual person's account, compared to a polished marketing mailshot from a corporate account.

The best advice is to pick a style to match your tone and intent. Not everything should feel 1:1 and personal. For example if you want to announce a new feature and put your best foot forward, then it's best to do it with beautiful screenshots, engaging copy, and a remarkable design.

When we're selecting the style of message to send to our customers, we most often use an in-app chat style message or a simple plain text email, because they feel handwritten and direct. We know they are likely to get better engagement than something that looks like it was sent to the masses.

A WORD OF WARNING: It’s possible to be *too personal* when you don’t know the customer. No one likes over-familiarity from folks they’ve never met. The tone you should aim for is akin to leaving a voicemail for an aunt you only ever meet at family celebrations. Warm and friendly, but respectful about what you don’t yet know.



Hey <first name>,

Would you or anyone else at <company name> like a demo of ProjectMap? We think it will really help you unlock more value from the product. Just let me know and we can set up a time that works for you.

Best,
Jane

Hey new ProjectMap user,

We hope you’re hitting it out of the park? Did you know that 66% of people who get a demo of ProjectMap convert to become paying customers? This week’s demo slot is on Thursday at 3pm (GMT). Why not sign up now?

ProjectMap customer success team

3. MAKE IT RELEVANT

One of the basic tenets of communication is that the more you try to appeal to everybody, the more you end up connecting with nobody.

To land effectively, your message has to be specific and appropriate to the user.

Let's say you've just launched your photography app and have acquired those all-important first 100 customers. All of these signups share an interest in your business, but they're not necessarily interested in the same thing. Some will want to know about your shutter speed and focus settings, some will be interested in your dancing hotdog filters. Your job is to tailor your message to both types of user.

A powerful feature for creating personalized messages is to include custom attributes in each message, specific to each user. For example, you could contact everyone who has nearly reached storage capacity in your photo sharing app, and let them know exactly how much space they have left. Or why not message users who have incorrect integrations?

Maybe you could mail your customers about their incomplete orders? Or, you could message your customers about their unfinished projects to encourage them to complete them.

4. ALWAYS BE POLITE

As you have absolutely zero leverage for negotiation inside someone else's inbox, it makes a lot more sense to avoid coming across as arrogant or rude. Here's a few things to remember:

» **BE RESPECTFUL.** Your users have given you permission to email them but don't abuse their inbox. Depending on the nature of your app they are there to enjoy themselves, complete a job, or save time, not to hear about what you've been doing or what they can do to make *your* life easier.

» **DON'T SHOUT AT YOUR CUSTOMERS.** People have long used capital letters to set text apart and convey its importance. Don't. It comes across as rude, leading people to tune out just as they would in real life. And it's not just all caps; extreme fonts, red text, and overuse of bold all feel too in-your-face. As a simple rule write to your customers in the same way you would talk to them face to face.

» **DON'T OVERUSE BUSINESS JARGON.** Throw in too many industry-specific buzzwords or acronyms and your reader will assume you are on autopilot, or worse, they won't understand what you're saying. It doesn't take much to get this right; it's actually easier than speaking more formally. Avoid all business-y robotic-type language in favor of sounding friendly, natural, and personal.

» **CONSIDER CULTURAL AND REGIONAL DIFFERENCES.** You wouldn't send a message to business customers in the US on the Fourth of July, so be aware of major holidays in other parts of the world where you might have lots of customers. What might be an oversight to you might display a lack of insight to your loyal customers.

Hey John,

For many of us the holiday period is time best spent with families. But we know from our user logs that some of you like to use the down time to get a head start on the New Year. That's why we just released a new calendar app that will make scheduling projects much easier.

Why not give it a try?

We'd also like to take this opportunity to wish all our customers a happy holiday.

Dwayne

Hey there,

HAPPY CHRISTMAS!!

Well actually we know that not everyone likes spending quality time with their family at the holidays. **That's why we thought you might like to try our new calendar app** as you make plans for the New Year back at the office.

Why not run it up the flagpole and see which way the wind is blowing?

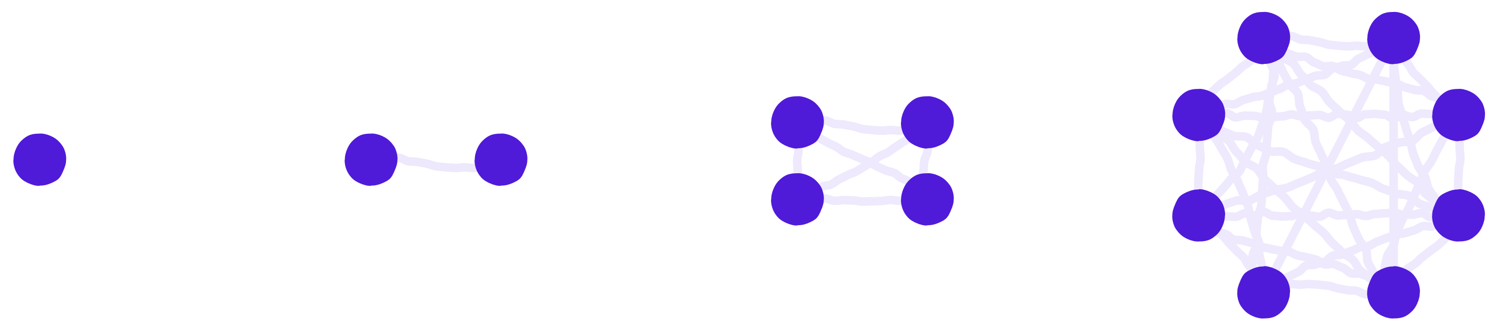
The ProjectMap team

5. SPEAK CONSISTENTLY

Tone and voice aren't always big issues in the early days of a startup. The founder or co-founders are usually handling all customer communications, or at the very least the entire team is huddled around the same table. It means that having a consistent tone in your messaging isn't too difficult.

But as your company grows, it becomes more and more difficult to keep everyone singing from the same hymn sheet. The more people there are in your company, the harder it is for consistent communication to succeed.

COMMUNICATIONS QUICKLY BECOME COMPLEX



1 Person
0 Connections

2 People
1 Connection

4 People
6 Connections

8 People
28 Connections

Having a company style guide helps ensure a consistent voice in your messaging. Companies like MailChimp and Slack have shared theirs, which are worth reading before you prepare your own. At Intercom we've also shared why we think a style guide is so important.

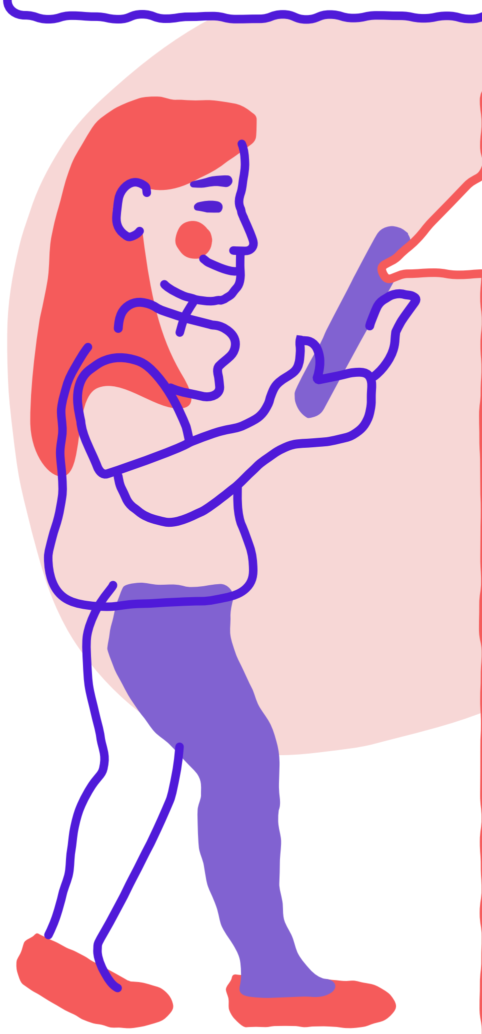
Tone is more subtle and depends on the context of the message. As you're writing, consider the reader's state of mind. Are they relieved to be finished setting up your product? Are they confused and seeking help through customer support? Are they disappointed to have reached the limits of your free plan? Once you have an idea of their emotional state, you can adjust your tone accordingly.

Hey there,

This is a bit of a downer dude, but it seems like we had a security intrusion at the weekend. It looks like one of the interns messed up applying patches to one of our databases which created a vulnerability.

We're sure that no customer data was accessed and your billing details are stored on a different network so no panic there. Just to be sure though we are advising everyone to change their passwords.

Sorry for the inconvenience.
Dwayne



Dear Sarah,

We are writing to inform you we recently confirmed there was unauthorized access to a ProjectMap database which stored user profile information. We have since blocked this access and made changes to our infrastructure so there can be no repeat of this incident. We have published an article on our blog which we think addresses all relevant details. No specific action is required of you at this time.

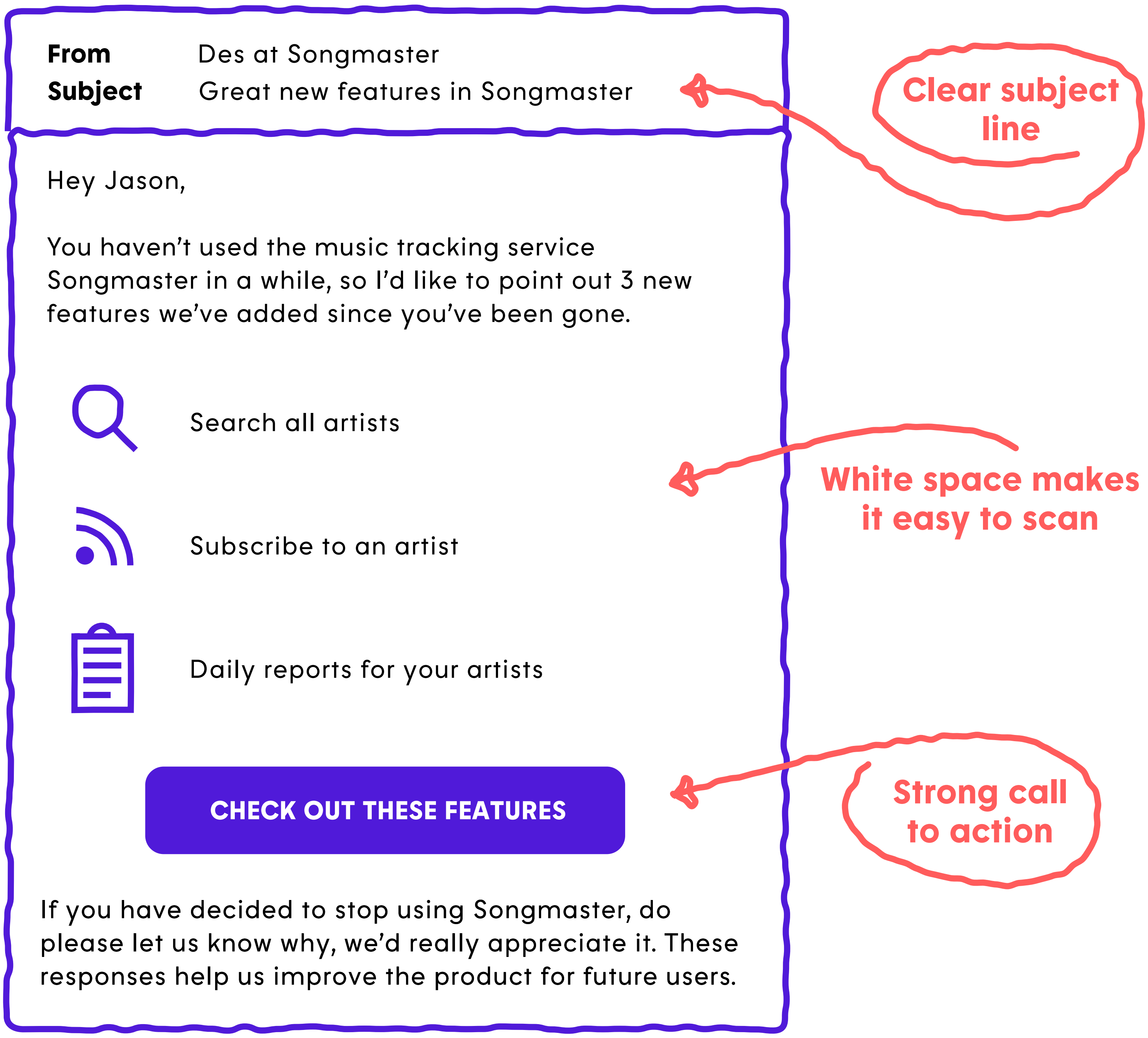
However, we have also just released Two Factor Authentication (2FA) and we strongly recommend all users enable this feature, to create an additional layer of security on their account. Additional details are available in our help center and you can enable 2FA directly on your account settings page.

Earning your trust through the operation of a secure service will always be our highest priority. We deeply regret this incident and apologize to you and all your team who use ProjectMap.

For more on our security practices and policies, click here.

Sincerely,
Michelle, CTO at ProjectMap

Anatomy of a good message



In most things in life, roughly 80% of effects come from only 20% of the causes.

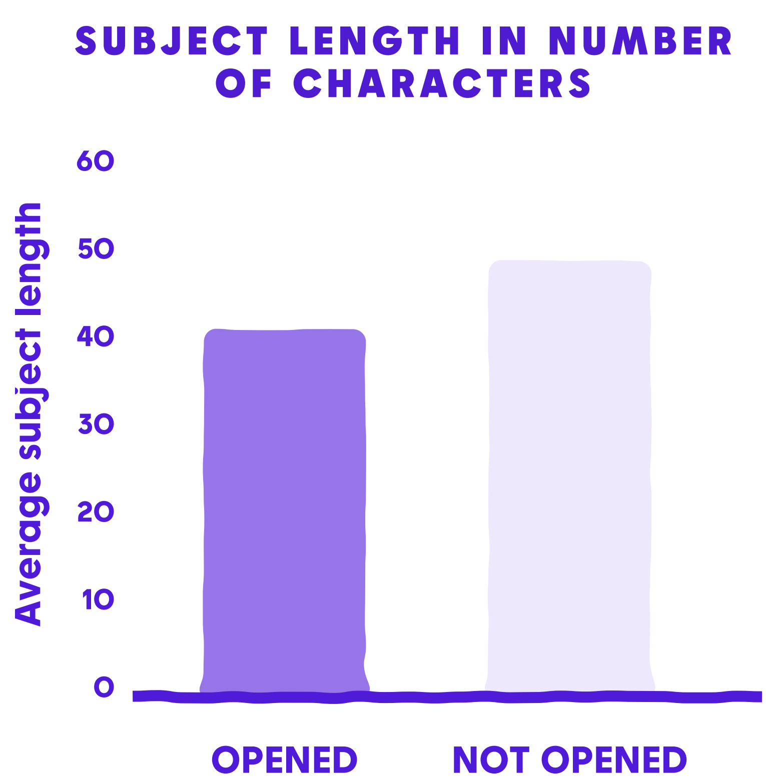
For instance, 80% of Warren Buffett's wealth comes from just 10 investments, and about 80% of software problems are caused by 20% of bugs.

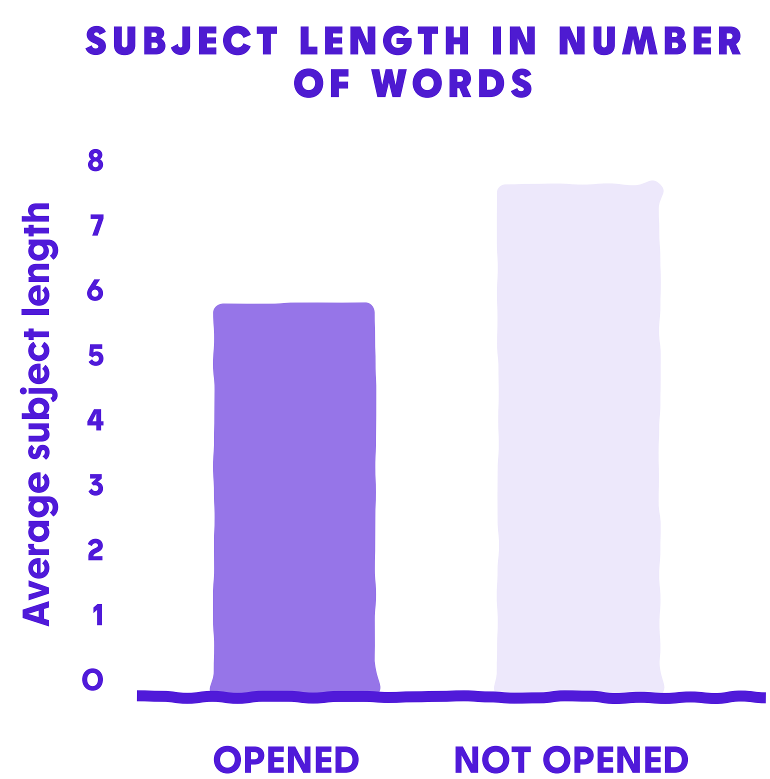
The Pareto Principle (aka 80/20 rule) states that a small number of things will have a disproportionate impact. When you're communicating with your customers, 80% of your success will come from those important-but-overlooked tasks - a compelling subject line, clear paragraphs, and an obvious call to action.

Here are our thoughts on how to get those all-important details right.

SUBJECT LINE

This isn't the time for purple prose. You have a limited amount of words to play with so be clear and direct. When viewed on a desktop the average inbox will show about 60 characters of the subject line. But increasingly, email is read on mobile devices - more than 50% according to estimates. In that scenario, you can't be sure that any more than 30–40 characters will be visible, which means you have less than 6–8 words to get to the point. Our own research has found that, on average, messages that are opened have shorter subject lines.





Of course, it can't just be any 5 words; you have to make sure they're interesting too. Hillary Clinton's campaign team achieved excellent results with simple and personal subject lines such as "I'd love to meet you", "You and me, {name}?", and our personal favorite, "Dinner?".

From HillaryClinton.com
Subject I'm not kidding, Maddi

Maddi --

After tonight's results roll in, keep this in mind: most of the country casts their primary ballots by the middle of March. We absolutely, critically need to make sure Hillary comes out on top in the states that lie ahead.

I'm not kidding, Maddi, I'm asking you to give $1 right this second. **Can you chip in?**

Finally, there's always the temptation to game the system with subject lines that generate clicks rather than communicate clearly. But there's a law of diminishing returns with those kind of growth-hacking tricks. For example, add the words "Win an iPhone 8" to your subject lines and watch your open rates double, but there'll be no significant change in behavior aside from recipient disappointment, which you likely don't have a metric for.

The golden rule for subject lines is actually quite simple: **your subject line should describe the subject of your email.** Can the reader tell from the subject line what you're writing about without going further? If not, why are you insisting that they guess? You're not Agatha Christie, and you're not paid to surprise your audience, so whatever it is you're trying to communicate, say it in your subject line.

CALL TO ACTION

The majority of messages our customers send are trying to get readers to perform a task. There are times where they are looking to start a conversation, but most of the time they're supposed to get people to act. It follows that you need to give message recipients a clear next step.

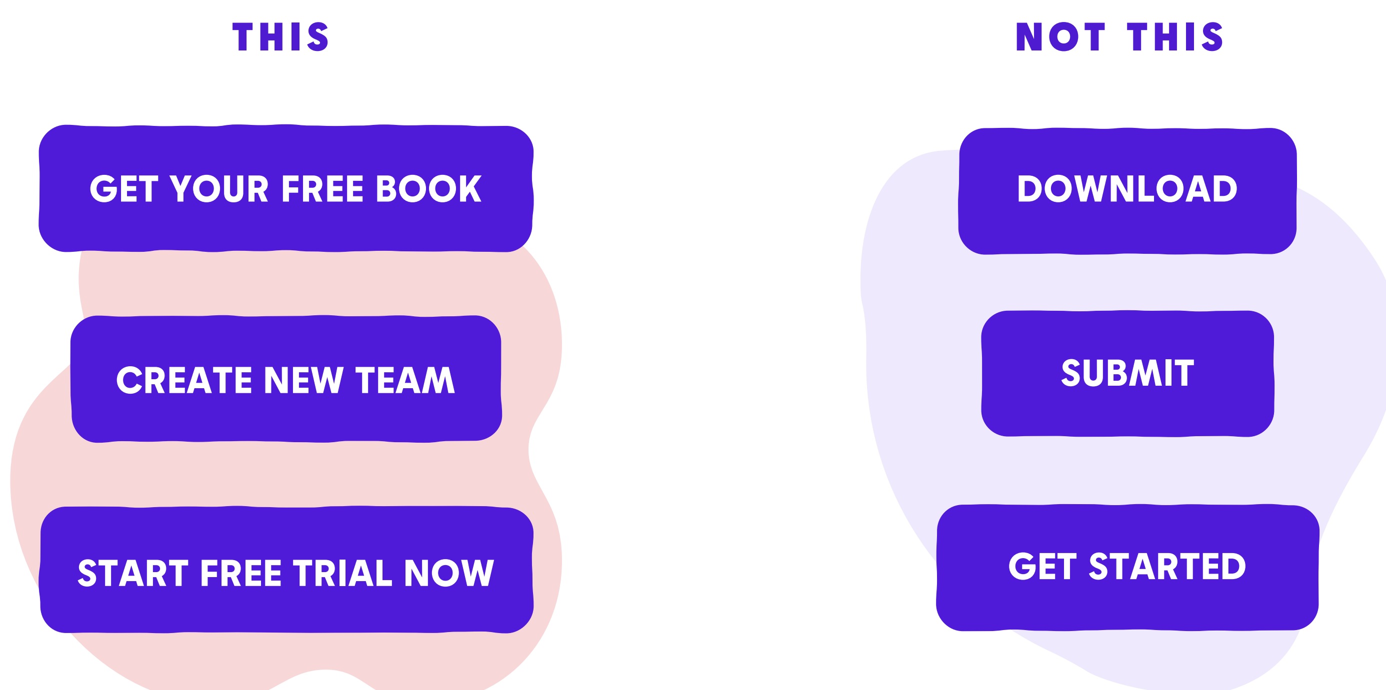
A good call to action should be persuasive and compelling. It should also be more descriptive than "click here"; use command verbs to make it clear what clicking a link or button will lead to:

- Read More on The Blog
- Download the App
- Upgrade Now
- Order Yours
- Compare Plans

It's also necessary to give readers a reason *why* they should complete your call to action. Make sure the content directly related to the button or link is sufficiently explanatory and clearly shows the benefit of taking the action. Giving a call to action a sense of urgency can also help ("Give ExampleApp a try - free for 60 days"), though there's a fine line between a sense of urgency and coming off as pushy. Just remember that not everything is as pressing to your readers as it is to you.

BUTTONS VS. LINKS

Buttons should be used for primary actions in your message. Attention-grabbing and prominent, they're the best way to define an item that requires action. A note of caution, however; avoid using more than one button in any single message or email. A button should be considered your ace-in-the-hole.



Links are best for non-crucial actions, e.g linking to supporting documentation like a best practice guide. It's also easier to include links within the copy of your email as they don't cause the reader to come to an abrupt halt. On the other hand, that makes links easy to miss or forget unless they're properly set apart from the rest of the email's copy. To avoid this, lengthen the number of words that a link covers. Instead of linking the word "upgrade" in a sentence, link an entire action or thought like "you can upgrade on our pricing page".

Whatever you do, don't overcomplicate things by giving your customers multiple options – there should only ever be one primary call to action in each message.

PARAGRAPHS

There is nothing more disheartening than opening a message to see a dense block of unbroken text. George A. Miller in *The Magical Number Seven, Plus or Minus Two* shows how people can remember more when the information is properly separated out for us. Take this string of numbers, for example:

06011988

Even though it's only 8 numbers, it's much harder to scan than:

06/01/1988

Those slashes help us parse the numbers into shorter and more recognizable units, which makes it easier to understand and remember the information.

You can start to apply this principle to your messages by using clear, distinct paragraphs. Long paragraphs of more than four or five lines discourage even the most committed reader, so break your messages into clear two-or three-sentence paragraphs. This adds that all important white space that makes your message easy to scan.

A note of caution: it is possible to use *too many* paragraphs. Many businesses today follow the James Joyce approach of writing single-line-paragraph after single-line paragraph. This might work well for that novel you've always wanted to write, but in email your reader might well get lost and miss something important. Instead, improve the readability of your content by varying the length of those paragraphs every so often.

FOOTERS AND POSTSCRIPTS

While the internet was still in its infancy, direct marketers had long figured out that, after the headline, the postscript is the most read piece of a sales letter. It's one of those things that has mapped pretty neatly to the digital world, so consider putting a well crafted P.S. on your messages. You can use it the same way a novelist uses a cliff-hanger at the end of a chapter. Let your message draw readers into a story, and use the postscript as the final "page turner" that forces them to click the link and keep reading.

Email footers are often an afterthought for most businesses, but they're a critical piece of your message – particularly in the early days of your relationship with a customer. There are certain things people will instinctively look for at the bottom of an email. Details about your brand, what country you are based in, how to contact you, and options to manage subscription preferences are all useful to include. The email footer is a place for transparency and clarity, so try not to overwhelm it with your brand's personality.

Messages you should be sending

Now that we've covered the characteristics of a good message, let's apply these principles to a few different types of messages you might want to send. We've used messages like these to help grow and scale Intercom – we hope a few of them will help you do the same.

WELCOME MESSAGES

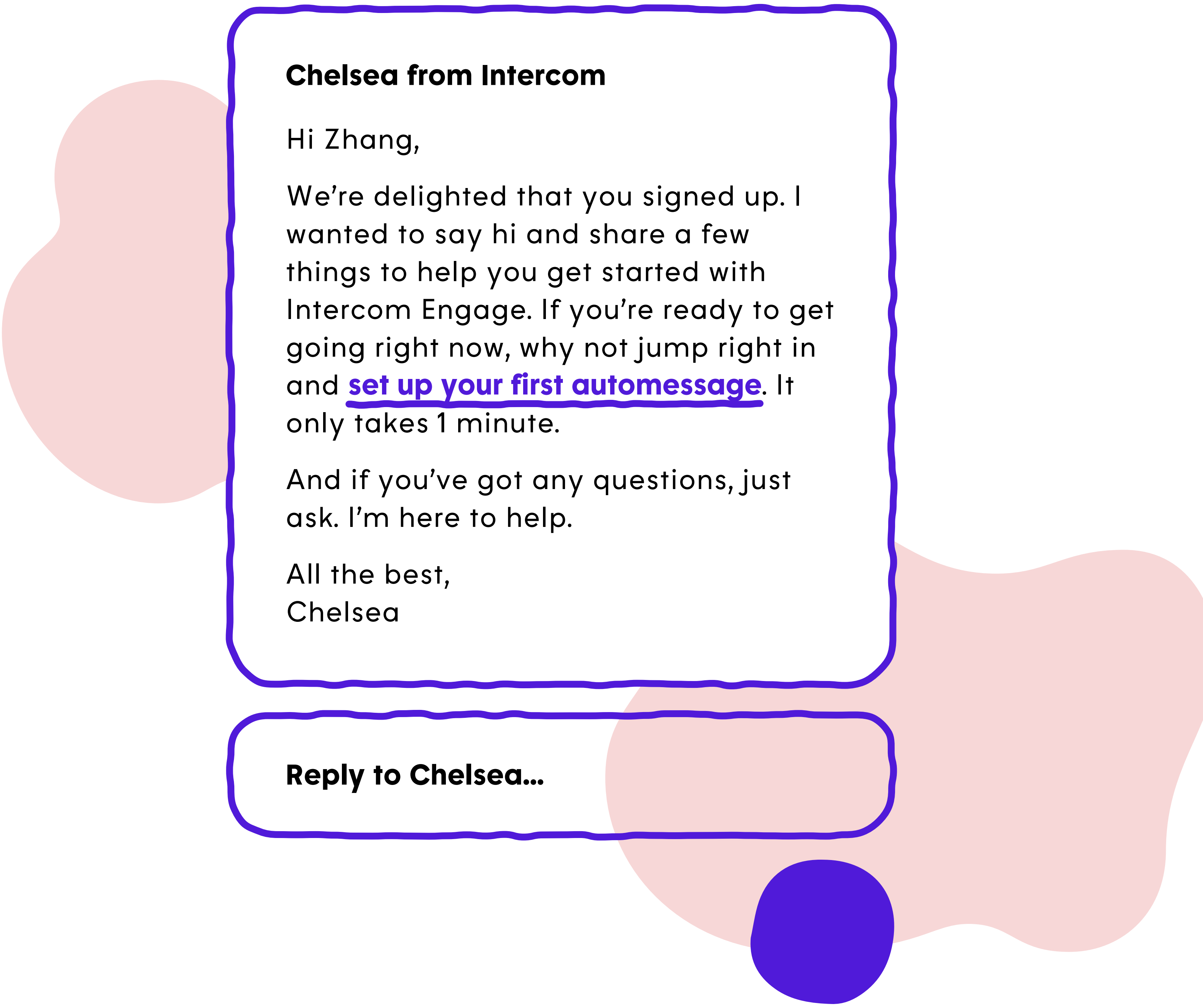
A *maître d'* sets the tone for your whole experience when you enter a high-end restaurant. A welcome message sets the tone for your product. Get it wrong, and it's likely the whole experience will be ruined.

And in the same way a *maître d'* might pull out your chair and tell you about the daily specials, your welcome message should focus on things that will actually help the recipient get value from your product. Things like:

» The most impactful next steps for them to take e.g. send a message or add 5 teammates.

» The three most common questions customers have on the first day. Address them right up front so they don't have to hunt around for the answers.

» A warm welcome from somebody behind the product who is ready to help e.g. "I'm the Product Manager of ExampleApp. I'd love to hear about what you're trying to achieve with our product."



ACTIVATION MESSAGES

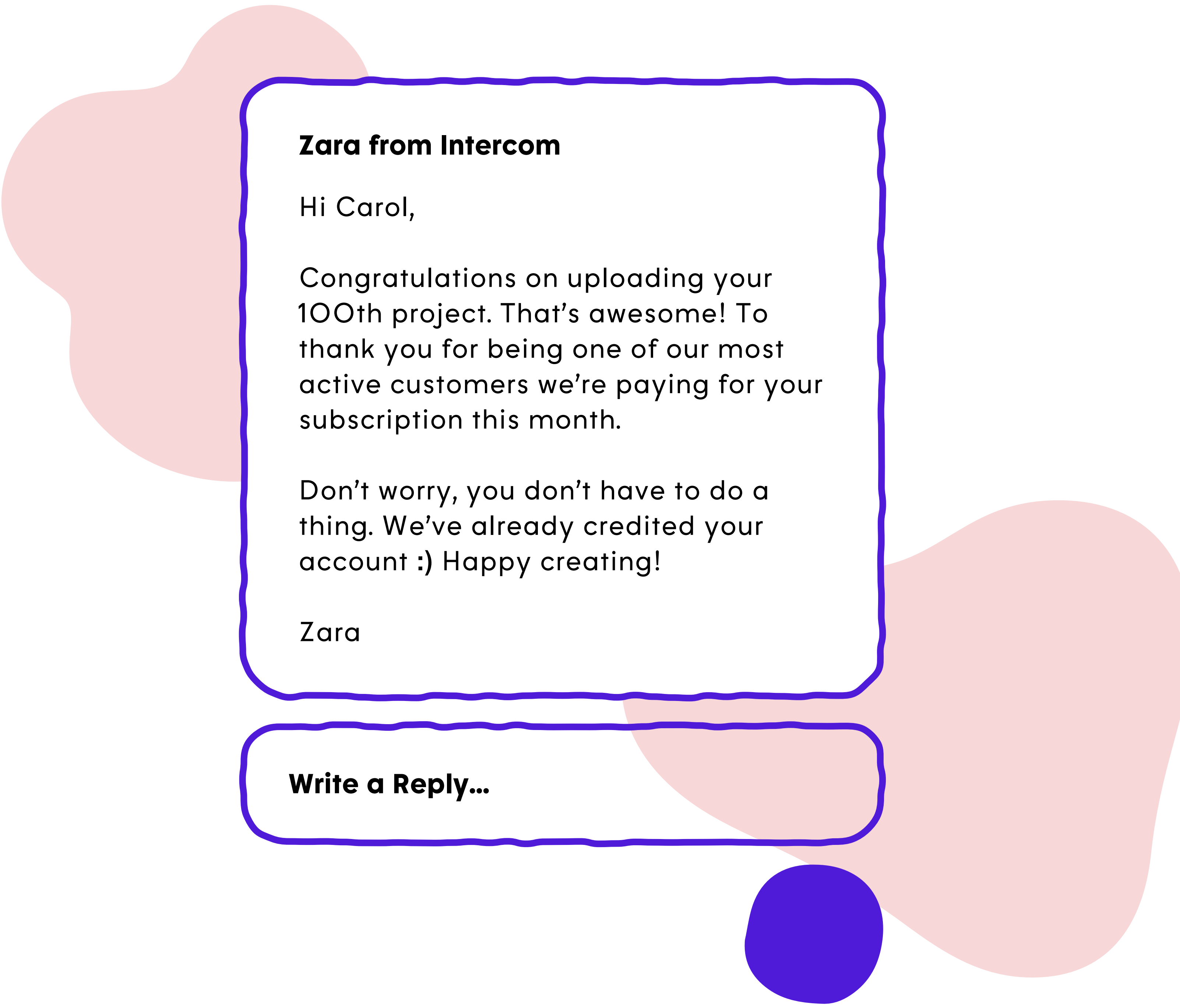
Many users who sign up for a product only use it once. This is especially true for products with a free trial. That's why you can't rest on your laurels and assume someone has committed to your product just because they signed up – they could easily just be curious to check it out.

There will be times when a user signs up, but fails to take the first step like completing registration, or adding their teammates. If two days after signup they haven't carried out that next step, you should automatically trigger a message. Make it an email, or possibly a push notification, rather than an in-product message as you are trying to get them back into your app. The message needs to clearly outline what the next step is that they need to take, and the value to them of taking that step.

MILESTONE MESSAGES

Your product should (hopefully) improve people's lives in its own particular way. The next step is to define the bare bones milestones users must complete to begin experiencing that better life. If I bought a grill, it could be cooking up my first steak. In Slack's case it could be inviting five teammates to the product.

A good customer engagement strategy recognizes how your users are becoming that better version of themselves. A timely in-app message or email is a positive feedback mechanism that lets people know "Congrats! You've done *X, Y,* and *Z*. Now you're three steps closer to why you signed up in the first place." When customers feel like they're making progress, they're much more likely to become recurring users of your product, and subsequently much more valuable for your business.



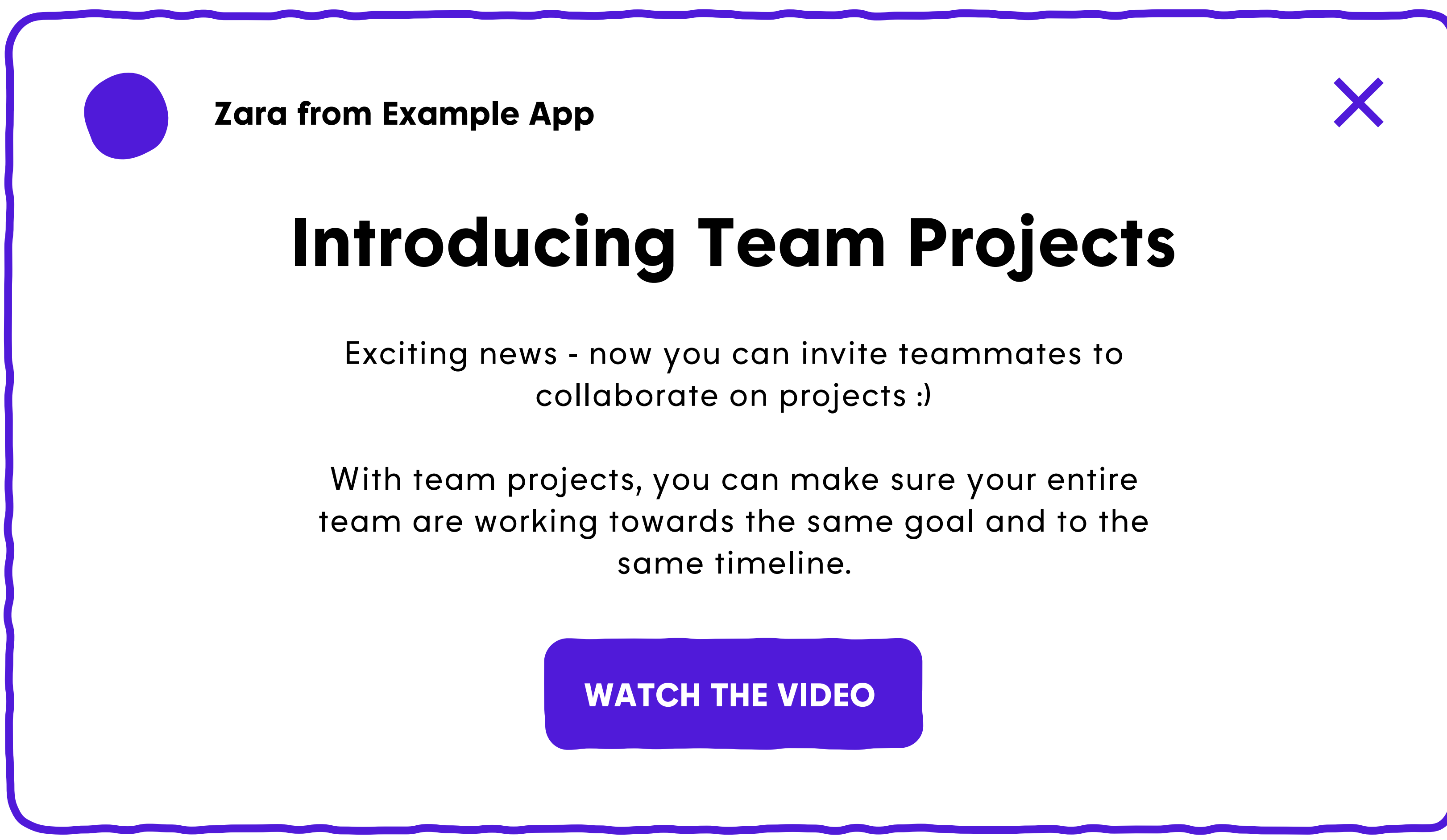
FEATURE ANNOUNCEMENTS

The value of a new feature isn't a product of the time and resources you put into building it. It's about whether or not it solves a customer's problem and it's up to you to show them how.

Focus the copy in your message on how this new feature will make their lives better. Put yourself in the shoes of the recipient who is probably hearing about the product or feature for the first time. What is the key thing that is going to convince them to give it a try.

Is it going to improve their social life, save them time at work, make them more money?

Avoid saying things like, “We’ve spent the last month restructuring how our export functionality works.” Instead, focus your message on what your users can now achieve. Saying something like, “Exporting reports is now automated which will save you heaps of time. Here’s how...” is a much better start.



FEEDBACK MESSAGES

Writing emails or in-app messages to gather feedback isn’t easy. You’re asking a favor of the recipient, in exchange for making the product better for them. It doesn’t help that people are most inspired to give feedback when they have an extreme experience. There’s a very good reason why you see Yelp restaurant reviews clustered around the “amazing” and “appalling” end of the spectrum.

Here are a few tips to make sure you're asking for feedback in the right way:

- **BE SPECIFIC.** Instead of vague questions such as "Have you got any feedback about our app?", ask things like "Was everything clear during signup?"

- **TELL THEM WHAT YOU'LL DO WITH THEIR FEEDBACK.** Feedback is only useful if it's acted on. Instead of benign platitudes such as "Your feedback makes us better", let recipients know what you're planning to use their feedback for, e.g. "Customer feedback is reviewed weekly by our product managers and helps inform our future roadmap."

- **DON'T ASK FOR TOO MUCH.** We've all been asked to fill out a 20-minute survey by a business we don't even remember dealing with. You can do better than that. Give your users one simple task to accomplish, and they'll be much more likely to do it.

From Christine at ProjectMap
Subject We'd love your feedback on our projects feature

Hi John,

It looks like you've created more than 10 projects. Are you finding it hard to keep them organized?

Thanks,
Christine

APOLOGIES

No matter how successful a business you have, you can be certain things will go wrong. You'll underdeliver and leave some customers with a bitter taste in their mouth. In these cases, "Sorry for any inconvenience" just won't cut it.

Even the most well-intentioned apologies can produce the wrong effect if not worded correctly. You see this all the time in business communications, where well-meaning apologies are followed by rationalizations that divert blame from the company or don't actually admit liability. When "but" is tagged onto an apology it counters the sincerity of the original message.

The best apologies are short and don't include explanations that can undo them. Here's a few tips:

» **OWN UP TO YOUR MISTAKES.** Your focus should be on what's gone wrong, not on the person's reaction to it. A simple "I'm sorry" is far preferable to "I'm sorry you feel that way" which turns an "I'm sorry" into "I'm not really sorry at all".

» **EXPLAIN WHAT HAPPENED.** This not only shows that you truly understand how and why something is a problem, but it also builds trust and transparency. Even better is to be equally forthcoming about what is being done to resolve the issue. Check out one of our favorite examples from Atlassian, apologizing like a human, not a corporation.

» **DON'T HIDE BEHIND AN ALIAS.** Your apology should come from a real human, not team@facelessmegacorp.com. Find someone willing to take personal responsibility for what's gone wrong, even if it's not directly their fault. There's always someone who's in charge, someone who stops the buck, so make sure your messages comes directly from them.

From Ruairí at Intercom
Subject Email Sent By Mistake

Hi Geoffrey,

You may have received an email from us today regarding an Intercom free trial. We made a mistake which caused it to send to the wrong audience.

There's nothing wrong with Intercom; this was human error. Mine, in fact. I'm really sorry about that.

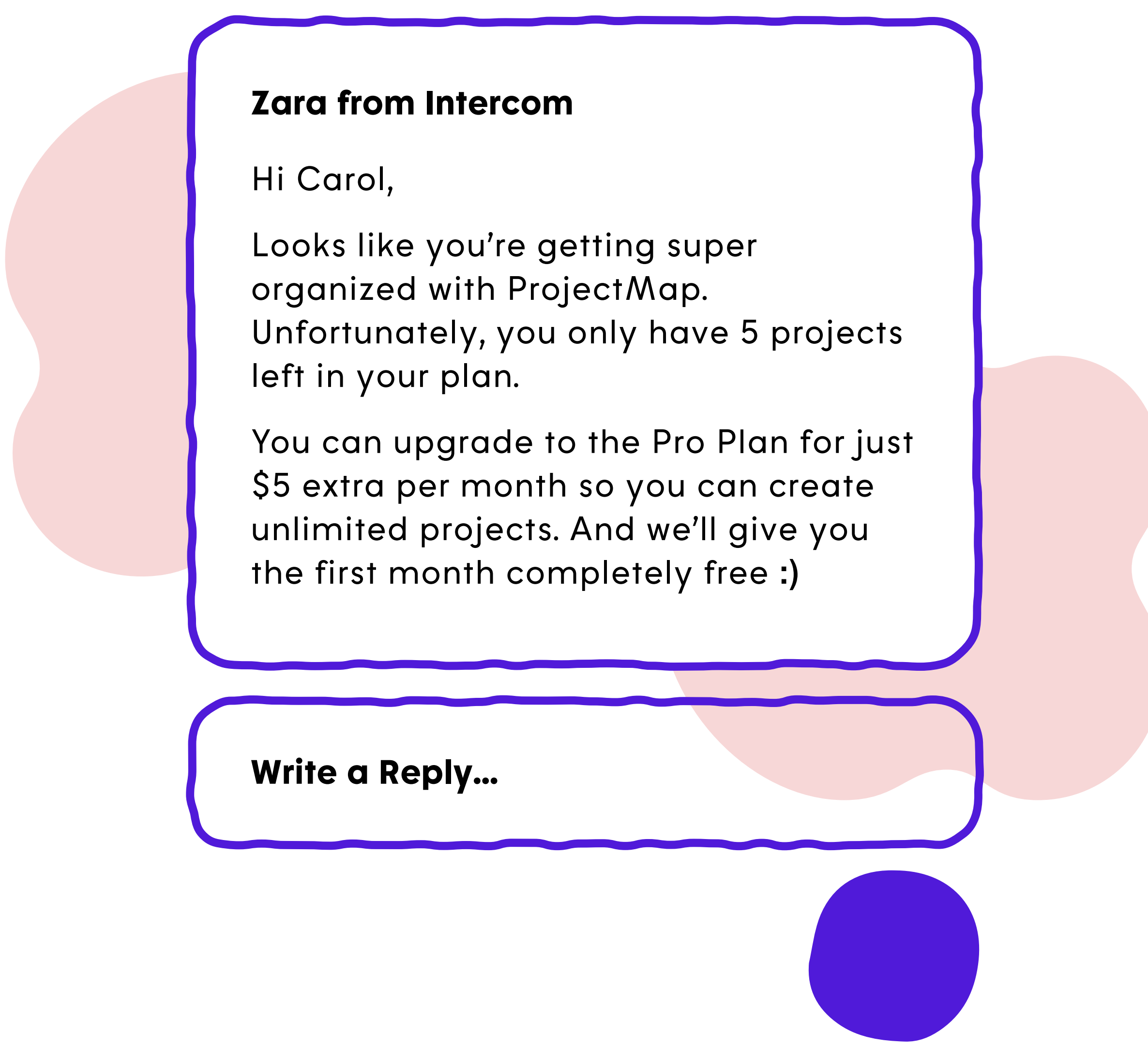
Ruairí

PROMOTIONS AND UPSELLS

In his book *Marketing Metrics*, Paul Farris shares a fascinating finding: "The probability of selling to a new prospect is 5–20%. The probability of selling to an existing customer is 60–70%." Promotions and upsells can provide the low-hanging fruit of customer engagement, but only if you leave the snake-oil tactics at the door.

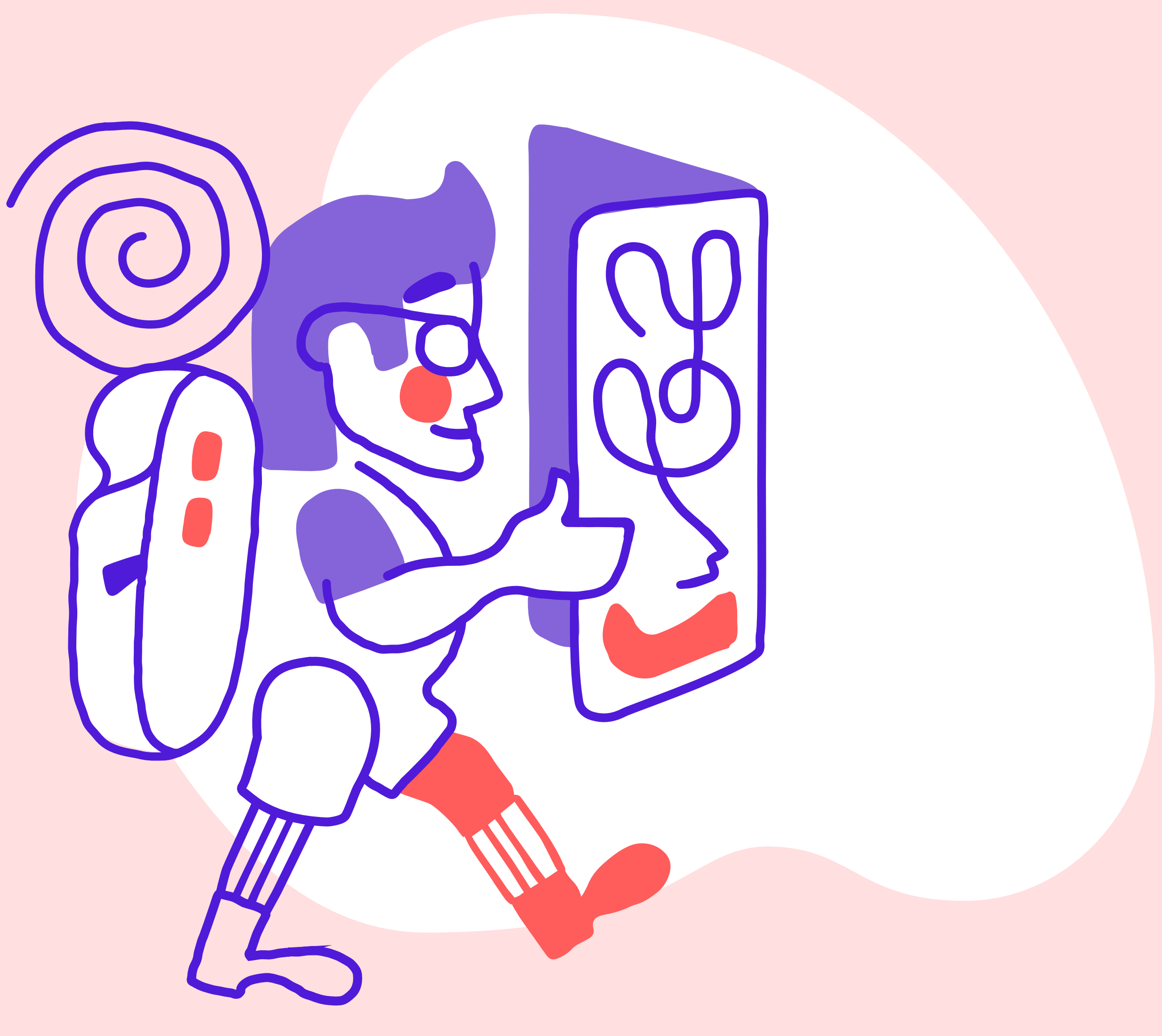
Making these messages successful depends on making the customer aware of the increased value they could be getting. The first thing they'll ask is: "What's in it for me?". Make it clear what the offer is, how it compares to your current offering, and how they can take advantage of it.

But remember, making customers successful with your product is your long-term goal, so don't offer a promotion or upsell unless it makes sense for your customer's business.



The average person receives over 122 emails a day. When you include in-app messages and push notifications, the number is greater still.

Even when you're competing against the powerful forces of life, like distraction and busy-ness, there will always be room for messages that are interesting, unique, useful and actionable. And the difference between producing good message content and producing great content isn't that huge; but the difference in the results you'll see is.



The Right Way and The Right Time

Most of us consider ourselves to be objective, consistent people, no matter the situation. That's rarely the case. We're more likely to find lasting romance on a rickety suspension bridge than a similar meeting on a sturdier bridge. More people get engaged in Paris in the springtime than on the 7 train in Queens. In short, the context matters.

Context is especially important for customer engagement. Your carefully worded product announcement might work fantastically well as an in-app message at 2pm mid-week, but will likely fall flat if it's emailed at 3am on a Sunday morning, so think carefully about your customers' environment, location and activity.

The limits of current technology mean you can't get granular enough to ensure everyone will get your message at the right time and in the right context. But there are a number of things you can do to make sure it arrives in the manner that's appropriate to the maximum amount of people possible.

The right way

The medium through which we choose to communicate holds as much, if not more, value than the message itself. Or, as Marshall McLuhan famously put it, "The medium is the message."

Nowadays, there are dozens of modern messaging tools at your fingertips, and the number of ways you can send those messages greater still. It can be hard to navigate the landscape of what is most appropriate for your business. There are pros and cons to every medium, so let's dive into where and when you should consider using each.

EMAIL

Compared to the latest breed of messaging apps that offer rich multimedia and interactions, email can appear slow and full of unnecessary constraints. And yet despite the explosion of new mediums, email is proving itself to be the cockroach of messaging formats. Every time we think it will die, it reappears with a new use case.

Here are a few of email's distinct advantages:

» **UBIQUITOUS.** There is a learning curve associated with each new messaging medium, for you and your users. Of all the messaging interfaces, email is the most common. No custom UI, no learning curve.

» **RELIABILITY.** Email is the gentle, dependable workhorse that you can rely on. According to Forrester, 90% of email gets delivered to the intended recipient's inbox. And because it doesn't use large amounts of data and can be read offline, email can be used on a wide range of devices.

» **REACH A BROAD AUDIENCE.** The total number of worldwide email users in 2017 is 3.7 billion people, according to the Radicati Group. The human population is 7.5 billion, so half of our entire species uses email. No other technology aside from electricity has that level of penetration.

The downside of email is that it's never in context. It makes no sense to ask your users for feedback about your signup process two weeks after they sign up, three hours after they shut your app down, and while they're checking their email on the train home.

Email does still have its place, though. The key advantage it has over in-apps is that you can guarantee your customers will receive it; unlike in-app messages, which they have to log into your app to receive. That's why email is best for critical communications. At Intercom we use it for billing, re-engagement, and one-off, time-sensitive announcements (e.g. "Today we launched Operator.")

POSITIVE: Scalable, ubiquity, (almost) immediate, all people, all devices, guaranteed delivery.
NEGATIVE: Overuse, low read and reply rates, timing and formatting.

LIVE CHAT

As 1:1 messaging has exploded in popularity, the ways people communicate with businesses has evolved. People who grew up in chat rooms and on AIM now want to chat on websites to get real-time answers, not to fill out forms or jump on a lengthy phone call.

More and more frequently, live chat is becoming a primary channel for customer engagement. It's often most people's first point of contact with your brand, so it follows that you have to make the experience count.

Here's a few best practice tips:

» **KEEP IT CONVERSATIONAL.** Unlike more formal mediums like email, live chat is inherently conversational and human. There's no need for boilerplate salutations, lengthy intros or signatures. Messaging is snappy. Tap it out, done. Nobody's going to think you're rude for not tapping out the novel-length version. And make sure to be yourself - don't be afraid to crack a joke or to use an emoji or two when you feel the occasion calls for it.

» **HAVE PEOPLE AROUND TO RESPOND.** There are hundreds of companies out there that have stuck a live chat widget on their website but don't have any employees actually staffing the live chat. There's nothing more frustrating than having a question, landing on a website, asking a question via live chat…and then nobody is around to answer your questions. Of course, it's unrealistic for your business to have reps answering questions 24/7, so you can use tools like Intercom's Operator bot to automate those all-important first interactions.

» **CONTROL VOLUME.** "Noise" is a major concern for anyone using live chat for customer engagement. You don't want to deal with all of the random people who might land on their home-page and start conversations for the heck of it. A good way to avoid this is by targeting high-intent pages, the pages people visit when they're serious about becoming customers. The pricing page is always a good place to start.

» **SHOW YOUR FACE.** Plenty of live chat apps have faces that almost certainly are fake, or look suspiciously like stock photos. With modern live chat tools like Intercom, you can make it clear who you are from the get-go by having a photo of yourself, your name and your job title within the messenger.

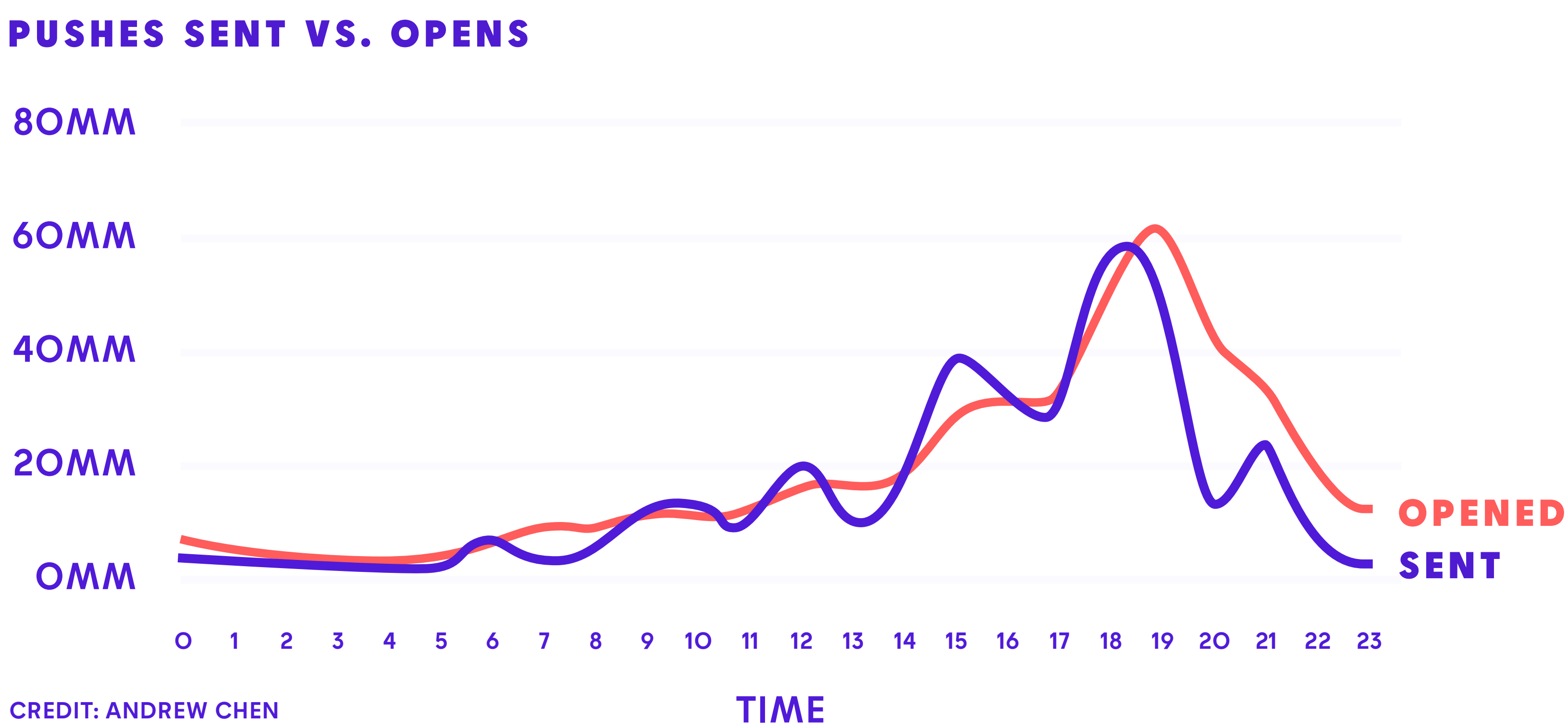
POSITIVE: Asynchronous, informal, easy to consume.
NEGATIVE: Disruptive, high volume, hard to scale.

PUSH NOTIFICATIONS

Notifications are often considered the telemarketers of the 21st century. Impersonal, irrelevant and poorly timed, many businesses treat them as a badly executed marketing strategy, rather than a publishing channel in and of itself.

Notifications can, however, be an extremely effective vehicle for your message. Here's a few things to pay attention to:

» **SEND WHEN MOBILE USAGE IS HIGHEST.** Andrew Chen has pulled together some excellent data which shows that while brands are sending a ton of pushes leading up to the evening (and dropping off quickly after), open rates are actually higher after 6pm. The data is clear – send push notifications between 6 and 8pm when engagement is at its highest.



» **BE CLEAR, NOT CLEVER.** Space is a huge constraint for push notifications. You only have 90 characters on Android and 140 on iOS, so why do you want to complicate things? So use push notifications when you have something simple to say that's of value to the user. Take Netflix, for example. A bad push notification would say something like "Check out our new releases!". A good push notification knows what you're interested in already, and would say something like "Better Call Saul Season 2 is now on Netflix."

» **FIND YOUR CADENCE.** Annoying notifications are the main reason people uninstall mobile apps, so make sure you use them judiciously. Don't send out notifications just because you can. The right frequency of notifications will vary from business to business (a breaking news app will send multiple pushes a day, a notetaking app rather less), but for B2B businesses, you probably shouldn't be sending more than one push notification a day.

Clearly every product is different, but before you send a push notification, ask yourself "what value will your users get out of a push notification over another channel?" If the answer is unclear, consider in-app or email.

POSITIVE: Immediate, ease of response/action, guaranteed delivery, right device.
NEGATIVE: Diminishing returns, interrupts recipient, easily ignored, not all devices, short message length.

IN-APP MESSAGES

The average email open rate for a SaaS company is just over 20%. In-app messages have been proven to see engagement rates that are typically double that. That's because in-app messages are the kings of delivering messages in the right context. If you wanted to get feedback on a new feature you launched, what could be a better time to ask than when customers are in your app and can take immediate action.

However, like push notifications, in-app messages must be handled carefully.

» **CHOOSE THE RIGHT LEVEL OF INTERRUPTION.** Even with the best intentions, in-app messages can be intrusive. Users are inside your product, trying to get something done, and you're trying to redirect their attention to something you think they should know. At Intercom, we use different in-app types depending on what we're trying to say, so that we're not interrupting users unnecessarily. For example, a full screen in-app might be useful for intro tutorials, while a less interruptive "snippet" would work better when you're asking for feedback.

» **TIE THEM TO A USER'S PROGRESS.** In-app messaging is particularly powerful at gradually revealing important details over time. Instead of overwhelming users with too much information in an intro tour in your product, in-app messages can drip-feed digestible chunks. Think of them as the coach that can keep everyone moving towards the ultimate goal.

POSITIVE: In context, high rates and quality of replies. Low effort for recipient.
NEGATIVE: Doesn't reach inactive users, may interrupt workflows/leisure time.

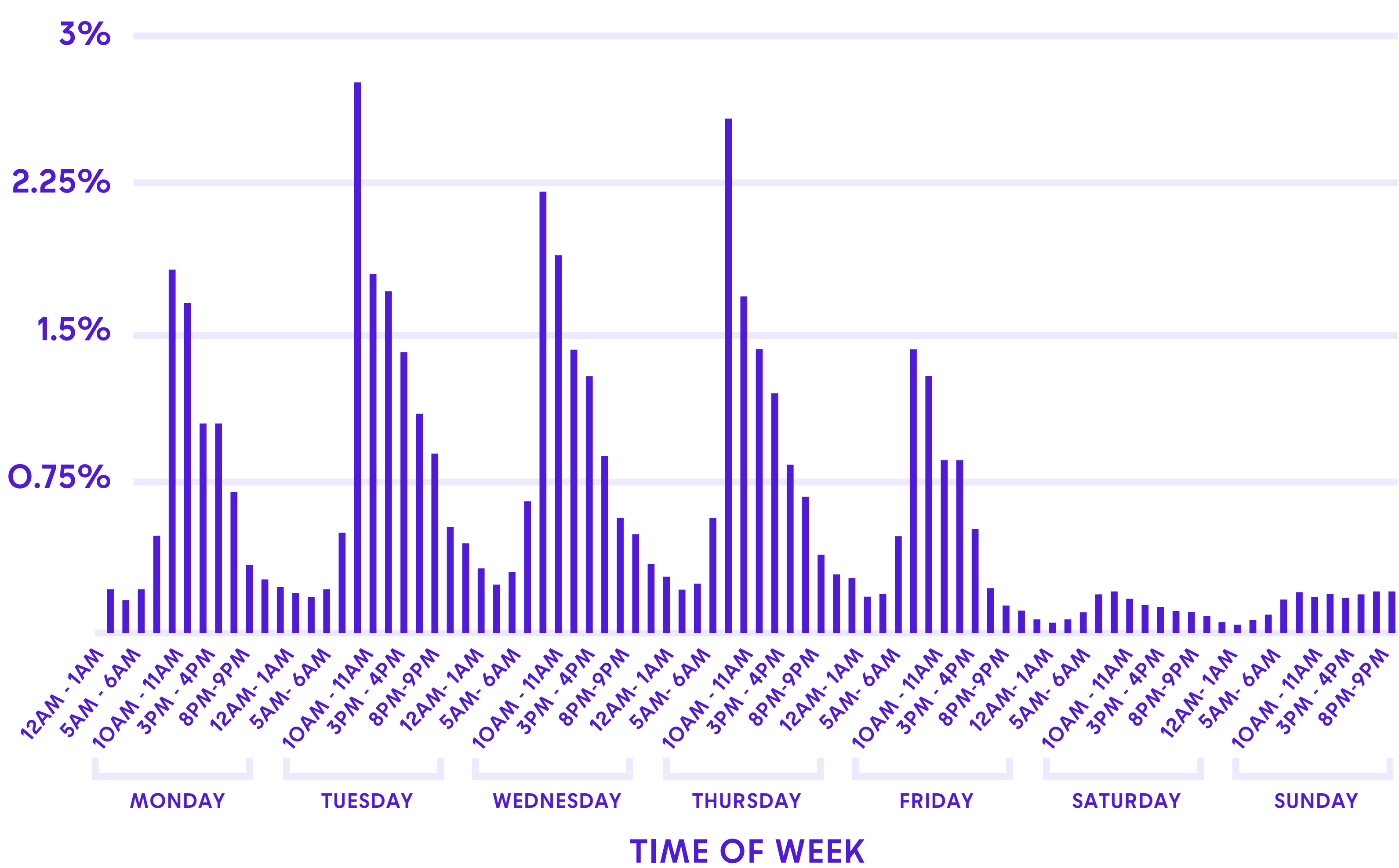
The right time

We've found that **the peak open rate for all types of messages across Intercom is 10-11am** (in the local user's timezone). (Note: Intercom is a B2B product and our data reflects that. Saturdays and Sundays might well work for a consumer audience, but we're simply not the best judge of that.)

This matches what we'd consider "normal" patterns of behavior. Most people do a quick triage of email and notifications first thing in the morning, archiving (or ignoring) those that are irrelevant, seeing if there's anything urgent, and leaving everything else unopened until they get to work. (There are definitely exceptions to this rule, but not all of us get up at 7am to battle through email. 😆)

If we examine this over the entire week, we can see Tuesday, closely followed by Thursday, has the highest open rates compared to any other day of the week.

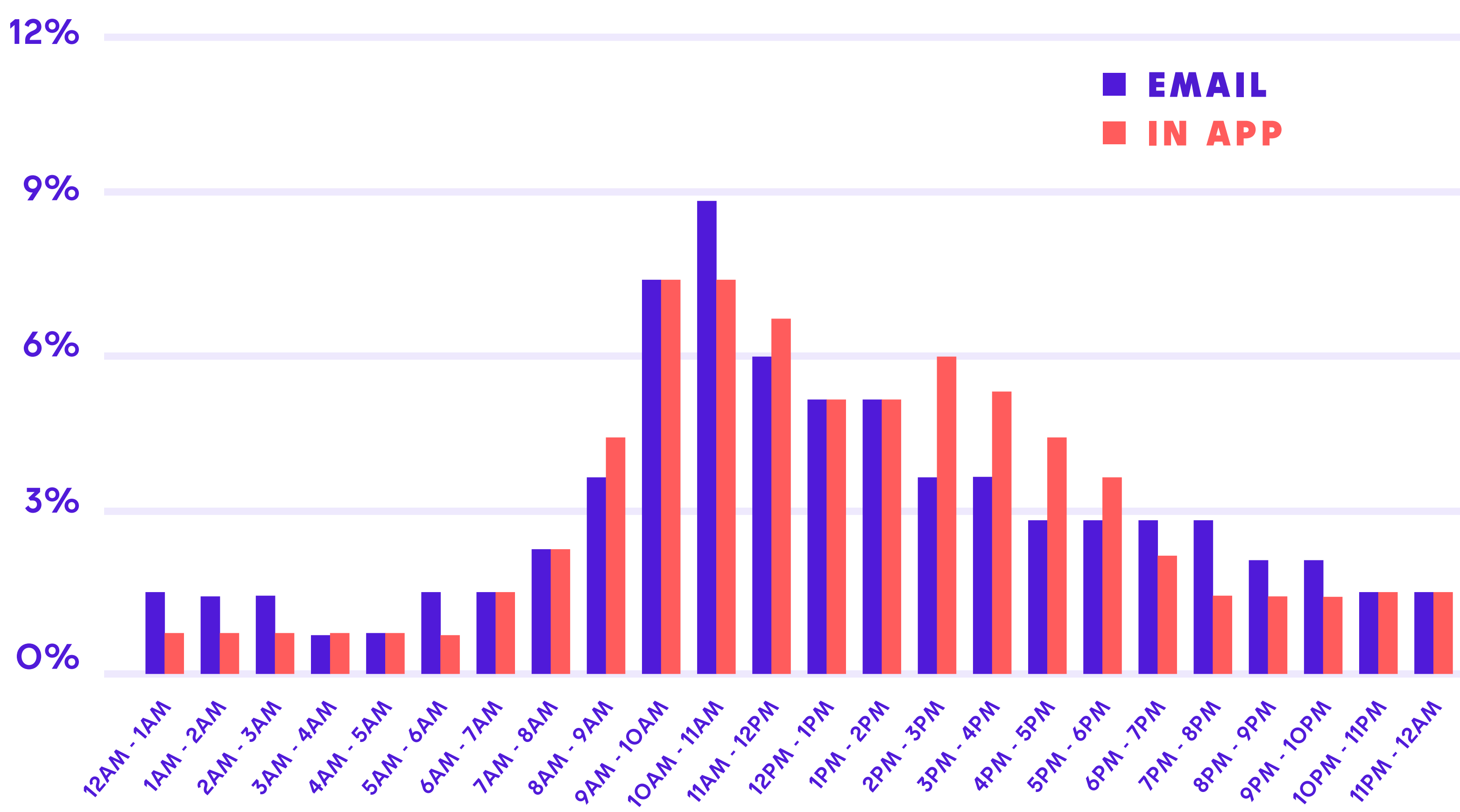
PERCENT OF MESSAGES OPENED BY TIME OF WEEK



In fact, all our data shows most activity happens during the middle of the week with only minor outliers. In short, the high-level advice from our data is that your message has the greatest chance of being opened between 10am and 2pm, Tuesday to Thursday.

It's when we start breaking this data out by message type – by in-app and email – that things start getting really interesting. For example, let's take a look at the daily open rates for in-app vs email.

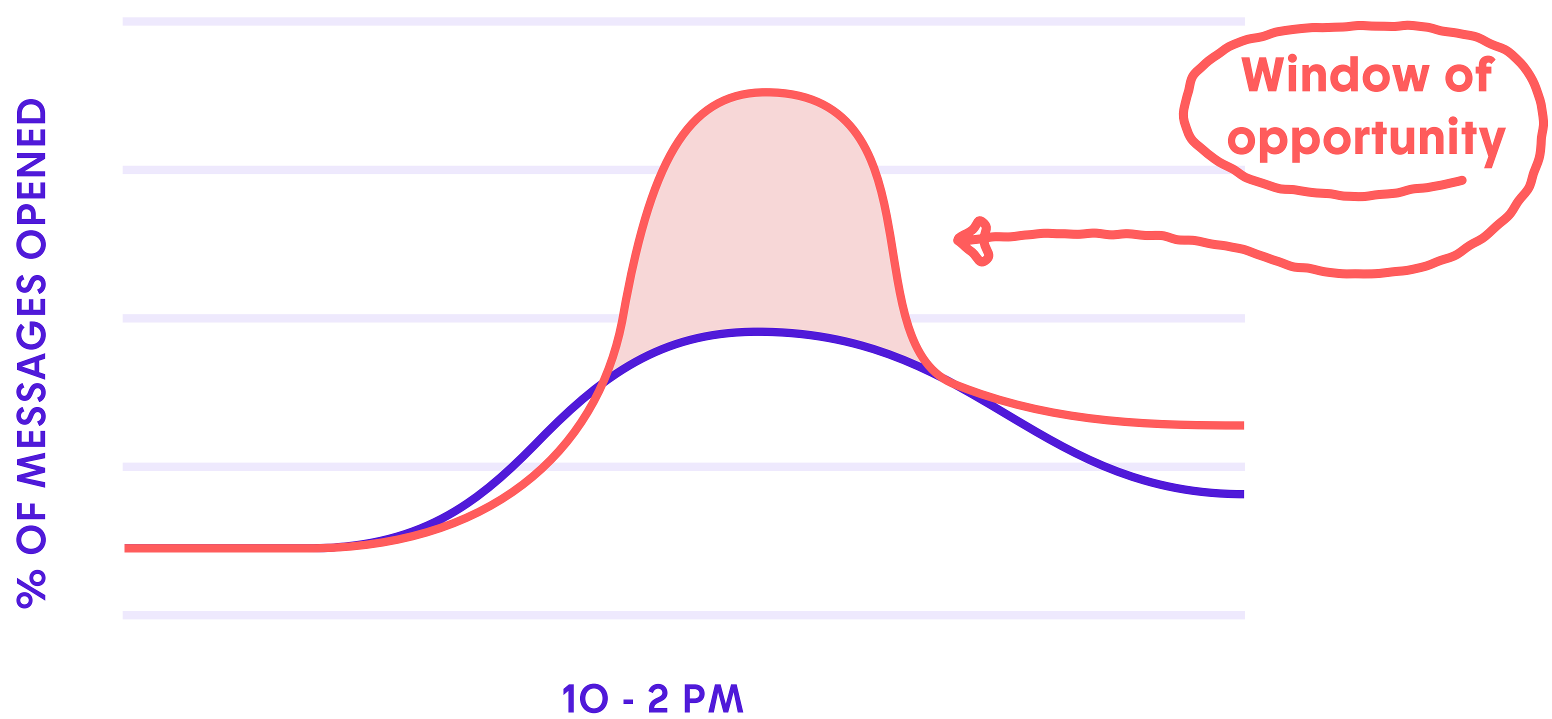
PERCENT OF MESSAGES OPENED BY TIME OF DAY



The spike of email opens between 10 and 11am is the highest open rate of any message across Intercom. Your inner marketer might start rubbing their hands together when you see that spike. "Let's send all our messages at 9am before everyone gets into the office!"

But that spike really only tells us part of the story. The disparity of open rates between 10am and 4pm are much greater across email than across in-app. There are significant peaks associated with email, but in-apps remain more constant across the day. Just compare in-apps at 9am and 3pm, for example. Pretty steady, right?

What we're seeing is that there is a window of opportunity associated with email on days like Tuesday and Thursday. Hit that, and your message will have a high chance of being opened. But if you're looking for a consistent open rate throughout the day, consider in-app.



This pattern is confirmed if we examine the data over the course of a week. Emails sent between 10am and 2pm on Tuesdays and Thursdays have the greatest chances of being opened, but in-apps have a remarkably consistent open rate throughout the entire week. For example, you'll have a much greater chance of getting an in-app opened than an email on a Friday. Likewise, late afternoon seems to be a particularly successful time for in-apps as opposed to email.

So what does this tell us?

» Across email and in-apps, messages have the most chance of being opened from 10am-2pm on a weekday.

» Unless you have good reason, avoid sending messages outside of business hours in the recipients' time zone.

- If you have a message that needs to be read immediately, consider sending email prior to peak opening times (Tuesday and Thursday, 10am-2pm)
- Time of week and time of day matters less for in-app messages than email. Between 10am and 2pm is best, but really as long as it's during business hours you should be fine.

The "perfect time" has many different variables beyond time of day. There are a number of distinct aspects of time you need to consider, but once you've considered the impact of all of them you'll be well positioned to draw up the perfect message schedule for your app.

FREQUENCY

There's nothing set in stone about how often you should message your customers. The appropriate frequency for an invoicing app which your customers log into once or twice a month is going to be very different from a consumer app which is aiming for daily usage.

One thing is for sure though – if you are sending too often, your subscribers are likely to tune out what you have to say. Even worse, if you start showing up in their inbox unannounced, or worse still uninvited, they will start to tag you as spam. A recent study of attitudes towards email marketing found 44% of respondents wanted to receive less email from companies and brands, with 46% saying they flagged email as spam if they received too many messages from the same company. It's not all bad news however – almost half of respondents said they would either like to get better quality content or offers tailored to them. At Intercom we ensure all messages to customers have a filter of "last contacted > 2 days", which is the minimum you should consider to avoid annoyance.

LOCAL TIME

The time of day when someone receives a message can have a huge bearing on its effectiveness. This is why it's incredibly useful to be able to segment your users according to their geography – when it's lunchtime in San Francisco, it's late evening in Berlin. In Intercom, you can use "delivery windows", so your message will only send to users during a time specified by you. For users outside that window we'll hold the message and deliver it when the window opens again.

Even if your current tools don't support geographic segmentation, it's possible to optimize the time of day you send, e.g. send a message at 9am PST/5pm GMT and you will get a high proportion of people at their desks in the US and Europe.

CALENDAR TIME

The day and date you send your message will also impact its success. In the days running up to Christmas, all but the most critical, or shopping related, messages sent in the days running up to Christmas will be filed under "possibly, later" by people in large parts of the world, i.e. they will be forgotten about. If you have an invoicing app, the final few days of the month is probably not the best time to contact your customers with a message which is not essential. It's likely to be the busiest time for your customers who are trying to get their billing sorted before the end of the month. Similarly, if you had a tax filing app you need to carefully consider what communications you send coming up to the April 15 deadline in the US, or whatever the comparable tax filing date is in your customers' country.

RECENCY AND SIGNIFICANCE

You should always aim to engage with a customer when their memory is still fresh, or even better, when there's still an opportunity to help them in the moment. That's why you're asked if you've found everything when you're still in the store, not when you're halfway across the parking lot to your car.

But even if you can't ask straight away, all is not lost. If an event is significant, e.g. buying a car or a cancelled flight, people remember them for a long time. The optimum scenario is depicted in the top right quadrant of the image above – asking about significant, recent event. Don't waste your time asking about unimportant events, far in the past. Even if you do get a response the data will be questionable.

CUSTOMER LIFECYCLE

In an ideal world, customers would respond like a chain reaction. See —> want —> install —> pay —> happily ever after. Customer lifecycles, like the lives of their customers, are messy. The relationships people have with your company develop over time. Some messages that would be valued in the first weeks of your relationship will be wholly inappropriate a few months in.

The secret is understanding the activity and status of your customers, and creating messages in terms of those relationships.

Take a project management tool. The key events in terms of a customer's lifecycle might be:

- signs up for a trial
- creates a paid account
- creates first project
- completes first task
- invites a teammate to collaborate
- invites a client to collaborate

An inactive customer's lifecycle, however, might look a little different. They won't follow such a linear path. The essential point is to match your message with where your customers are in that lifecycle, and nudge them along the path towards success.

Crafting a successful messaging schedule

As your business grows, you'll have to start thinking about creating, and automating, your customer engagement strategy. Sending messages individually just doesn't scale as your customer base grows.

The low-hanging fruit is to create a simple message schedule. This can be time-based (e.g. a user receives a message on Day 1 after sign-up, Day 8 etc) or behavior-based (hasn't invited teammates, has created 5 projects etc). When you are getting your product or company off the ground either one of these may suit your needs – much of your communication with customers will still be personal and 1:1.

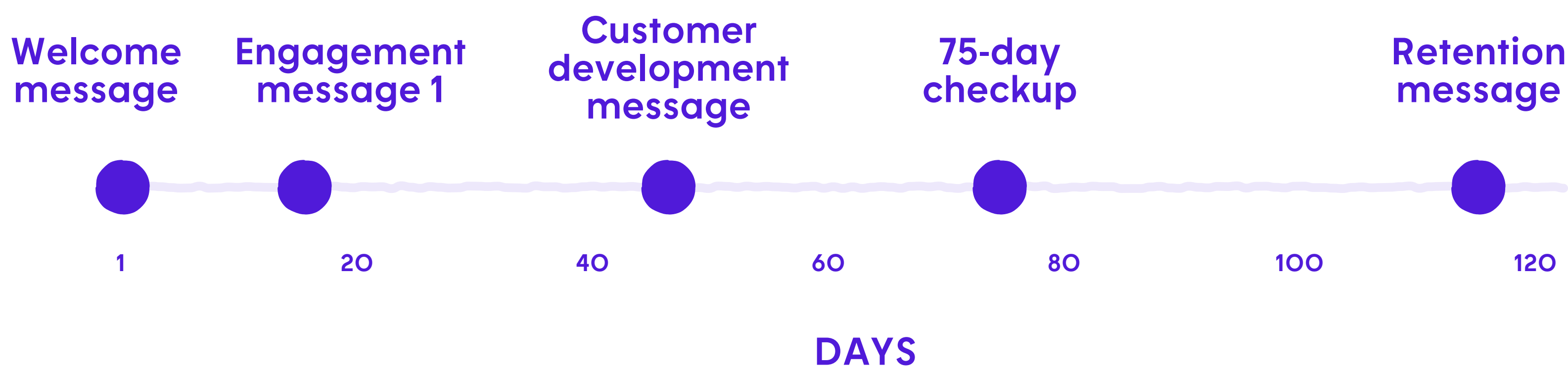
But you can take things to the next level by combining time and behavior. That means you won't inadvertently send new signups a message about the calendar feature in your app on Day 5, when they've already synced it with their Google Calendar. (This philosophy is what lead us to build the Smart Campaigns feature in our Engage product.)

Let's quickly run through each of these approaches.

1. TIME- OR BEHAVIOR-BASED SCHEDULES

The simplest message schedule is a timeline for the set of messages you want customers to receive at key moments during their lifecycle using your product. Just as you don't expect the host to ask you to fill out a comment card as you take your seat in a restaurant, it doesn't make much sense to ask a customer who signed up yesterday to follow you on Twitter. In the early days of the relationship, you've got more important things to talk about.

That's why you want to start by mapping your key messages along a timeline. A basic onboarding drip campaign is a good example here. A message is sent on day one, day 15, day 30 to help new signups get deeper into the product.



The problem is that drip campaigns with hardwired time or behavior-based rules can't easily adapt to how different customers use your product in different ways and over different time frames. They lock your customers into a series of messages and ignore the progress your customers may or may not have made with your product.

A better (but more complex) solution is to combine time and behavior in your message schedule.

2. TIME- AND BEHAVIOR-BASED SCHEDULES

Combining time and behavior allows you to become much more targeted and relevant to your customers. Let's think back to our previous example of asking new customers to follow you on Twitter. Even if you are only using time-based messages, that's not a good message for day 2 of your relationship. Combining time and behavior filters means you can make sure that message reaches the right people at the right time. So you might apply some filters like:

Signed up more than 30 days ago (*i.e. is no longer onboarding*) - **Time**

AND

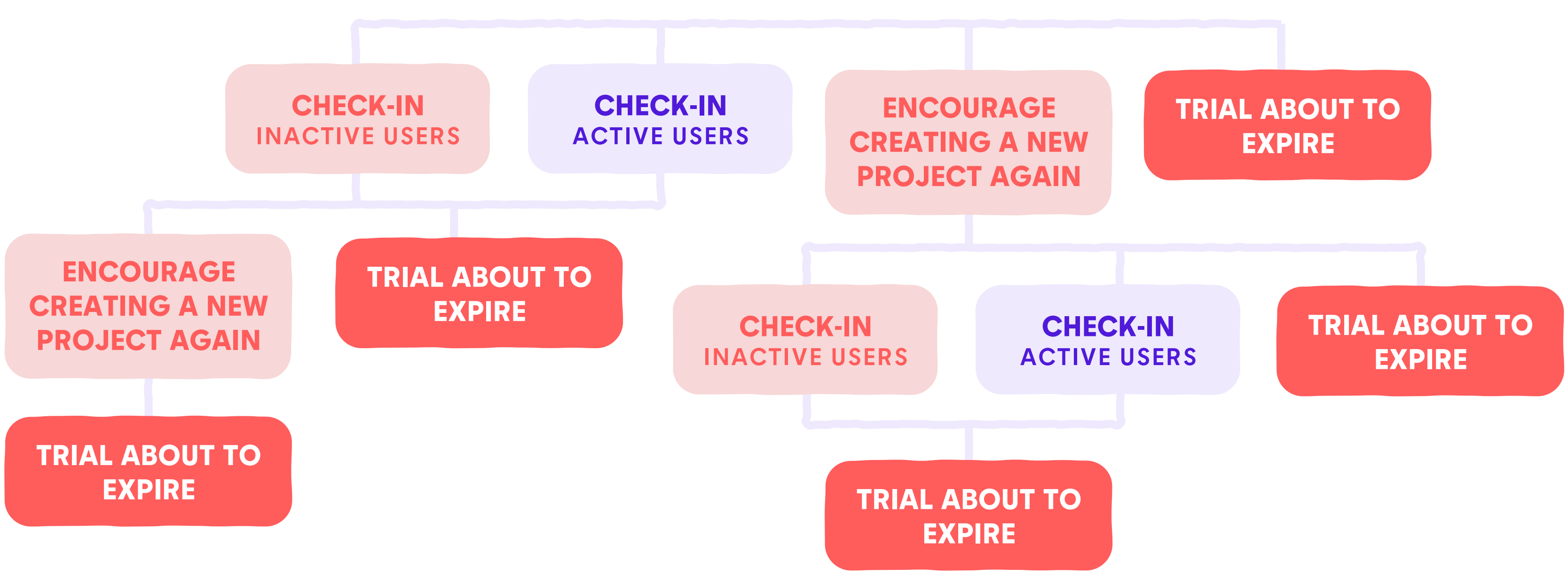
Read 2 blog posts (*has shown interest in your content*) - **Behavior**

AND

Signed up for webinar (*has completed a key activation step*) - **Behavior**

A message such as this is, we hope, relatively easy to understand. But as customers start to take on more and more behaviors, it can become increasingly hard to keep track of these behaviours and understand the relationship between. That's because you've created this N-dimensional space. Time is one dimension, and then every new behavior you include adds another dimension. These complex decision trees are impossible to hold in your head.

To try to tame this complexity most people either get their pen and paper out, or start drawing it on a whiteboard. You start trying to visualize the number of possible customer journeys, the different messages that could be received in different orders.



But that breaks down quickly. Take the above example, with a series of just four behavior-based messages, and imagine how complex it gets when you start adding more behaviours. There comes a point in time where no whiteboard or Moleskine will be enough to predict every single possible customer journey in your product.

3. CAMPAIGN-BASED SCHEDULES

At Intercom, we think about messaging scheduling in a way that liberates you from having to create complex decision trees to account for the many different actions people can take, and orders they can be taken in. It's the approach we take with the Smart Campaigns feature of our Engage product.

Firstly, we collapse the ingredients that inform your message schedule – time, context, behavior – back down to time. Time is the easiest way you can comprehend how a customer is going to experience your messages. The next thing we consider is the frequency with which you want to message customers e.g. maybe that's every two days during onboarding, maybe it's once a week when you are trying to encourage upgrades to your new pricing plan.

Then rather than asking you to consider the dependencies or direct relationships between each of the messages, you just prioritise your most important messages from top to bottom – most important to least. So you might give your "Getting Started video message" top priority and the "Follow us on Twitter message" could be number 10.

That's the logic of how Smart Campaigns works. Rather than trying to guess the pathways people might take in your product or how they respond to your messages, it adapts the order of messages to match their behavior.

There are two distinct advantages to this approach:

1. You can get specific about targeting based on behavior
2. The campaign adapts to each individual user without having to create and maintain complex decision trees.

Best practices for creating message schedules

At Intercom we've been using message schedules and campaigns to communicate with a large customer base for several years. Here's some of the best practices we've learned along the way.

» Strike a balance between messages that encourage action and messages that educate your customers. For example, once a customer has uploaded a few photos to your photo sharing app, an action you want to encourage, it's a good idea to share tips that will help them get the most from your product.

» Consider adding "Replied to any message" as a campaign goal. Then once a user has replied to any message in that campaign, a useful proxy for engagement, they won't receive any more messages.

» It's worth trying to target users who clicked a link in one of your messages but who didn't complete the action you wanted. For example, users who clicked a link on a "conversion message" but don't sign up for a paid plan might need a stronger incentive like a discount.

» It's a good idea to check if any of your campaign messages have bounced for specific users. Maybe these users have entered their incorrect email address, for example. You should follow up with these users via an in-app message to ensure you get their correct email address.

» If you want to prevent a group of users who have received one message from getting another message, you can add the rule ‘Received message x is false.’ This is useful for sending two different versions of a similar message to two different groups of users. For example, you won’t want to send active users the same message as those who are slipping away.

While it’s true that creating a message schedule that understands time, behavior and context is a lot harder than creating a set-it-and-forget-it drip campaign, it’s the single best way of sending a series of messages that truly engage your customers. In practice, this is an iterative process, where customer feedback and conversation, as well as message performance will inform improvements and changes to make.

Conclusion

Today it's easier than ever to launch a software business. Everyone is building web and mobile apps. App stores have levelled the playing field and now anyone can publish an app on the same terms as a big company.

What separates the good from the great products is how engaged they can keep their users. Getting hundreds of thousands of users is the new normal. It's the products that can keep those users that ultimately count.

We firmly believe real customer engagement comes from meaningful communications with the people who are using your product. Opening your business up to regular interactions with customers might not come naturally, but if you're in it for the long haul, for customer retention and loyal users, you'll have to tackle it head on. As Stripe's Patrick McKenzie says, "No startup has ever died because they spent too much time talking to customers."

Now that you've made it this far, it's up to you to implement the lessons and make your messaging strategy your own. We'd love to hear how you fare with these strategies. Let us know on our blog, Inside Intercom, where we share our latest thinking, not just on customer engagement, but on a range of topics that impact internet businesses such as product management, design, customer success and marketing.

We hope you've learned some useful tactics for deepening your relationships with customers and having those conversations at scale. If you have, we'd love if you shared the book with your friends so they can benefit from it as well.