

SaaS Customer Engagement Checklist

Step 1: Create Value-Driven Video Tutorials

- ☐ Identify your target audience and define the specific goal for each tutorial.
- ☐ Map out common user pain points and design tutorials that directly address them.
- ☐ Structure each video logically, starting with simple tasks and moving to more complex features.
- ☐ Invest in high-quality audio and clear, concise visuals.
- ☐ Keep videos short—aim for under five minutes to maintain viewer attention.
- ☐ Embed videos in your help center and knowledge base for easy access.
- ☐ Add captions and transcripts to enhance accessibility.
- ☐ Regularly update your video library to reflect new product features or changes.

Step 2: Personalize the Onboarding Experience

- ☐ Collect key user data during signup, such as role, company size, and primary goal.
- ☐ Use this data to create segmented onboarding journeys for different user types.
- ☐ Implement interactive walkthroughs with tooltips and hotspots to guide users through essential features.
- ☐ Develop a clear onboarding checklist with visual progress indicators to give users a sense of accomplishment.
- ☐ Deliver timely, contextual in-app messages that provide guidance and highlight key features as users explore the product.

Step 3: Implement Strategic In-App Messaging

- ☐ Define a purpose for each message type (e.g., tooltips for hints, modals for announcements).
- ☐ Segment users based on their behavior, demographics, or engagement level.
- ☐ Target messages to specific user segments to ensure they are relevant and impactful.
- ☐ Determine the optimal timing and frequency for messages to avoid overwhelming users.
- ☐ Include a strong call to action in every message, encouraging a specific next step.

Step 4: Actively Seek and Respond to Feedback

- ☐ Establish multiple feedback channels, including in-app surveys, forms, and a live chat option.
- ☐ Send out regular surveys to gather insights on product satisfaction and specific features.
- ☐ Systematically analyze all incoming feedback to identify common themes and pain points.
- ☐ Prioritize addressing the most impactful issues first.
- ☐ Communicate your action plan back to your users to show their feedback is valued.

Step 5: Introduce Gamification Elements

- ☐ Design a system of rewards and badges for completing key tasks or achieving milestones.

- ☐ Create fun challenges and competitions that encourage new forms of engagement.
- ☐ Allow users to set and track personalized goals within the application.
- ☐ Incorporate lighthearted, engaging elements like interactive quizzes or mini-games.

Step 6: Leverage Web Push Notifications

- ☐ Obtain explicit user permission before sending notifications.
- ☐ Personalize notifications with the user's name and relevant information.
- ☐ Segment users to send highly targeted notifications.
- ☐ Schedule notifications mindfully to avoid sending them at inconvenient times.
- ☐ Ensure each notification has a clear call to action.

Step 7: Embrace an Omnichannel Communication Strategy

- ☐ Integrate all communication channels to create a seamless user experience.
- ☐ Maintain a consistent brand voice and messaging across all platforms.
- ☐ Optimize each channel for its unique strengths (e.g., email for longer content, social media for community building).
- ☐ Use personalization to tailor communication based on user behavior and preferences.

Step 8: Track and Analyze User Behavior

- ☐ Utilize analytics tools to monitor metrics like time in-app and feature usage.

- ☐ Implement event tracking to capture specific user actions.
- ☐ Perform cohort analysis to understand engagement patterns over time.
- ☐ Use the collected data to inform and refine your engagement strategies.

Step 9: Segment and Target Your Audience Effectively

- ☐ Define clear criteria for segmenting your user base, such as behavior or engagement level.
- ☐ Develop and launch targeted campaigns for each segment.
- ☐ Use personalization tokens to make messages more relevant to individual users.
- ☐ Conduct A/B tests on your messaging and offers to continuously improve campaign performance.

Step 10: Build a Thriving Community

- ☐ Select a community platform that aligns with your brand and audience.
- ☐ Provide valuable, engaging content to spark discussion.
- ☐ Actively moderate the community to maintain a positive and supportive environment.
- ☐ Organize events or contests to foster a sense of belonging and increase participation.
- ☐ Recognize and reward your most active community members.

Step 11: Provide Exceptional Customer Support

- ☐ Offer support through multiple channels like live chat, email, and phone.

- ☐ Set and adhere to clear service level agreements for response times.
- ☐ Create a comprehensive knowledge base to empower users to find their own solutions.
- ☐ Train support agents to provide personalized and empathetic assistance.
- ☐ Implement proactive support to address potential issues before users report them.

Step 12: Showcase Customer Success

- ☐ Develop and publish detailed case studies highlighting how your software helps customers.
- ☐ Gather and feature testimonials on your website and social media.
- ☐ Create customer spotlights to share individual success stories.
- ☐ Encourage and promote user-generated content.

Step 13: Run Contests and Promotions

- ☐ Plan contests that encourage content creation or new user referrals.
- ☐ Offer appealing and relevant prizes or incentives.
- ☐ Promote contests across all your communication channels.

Step 14: Continuously Test and Iterate

- ☐ Regularly run A/B tests on your onboarding flow, messaging, and other engagement tactics.
- ☐ Use data analysis to understand test results and refine your strategies.
- ☐ Establish a formal feedback loop to gather user input on all engagement initiatives.