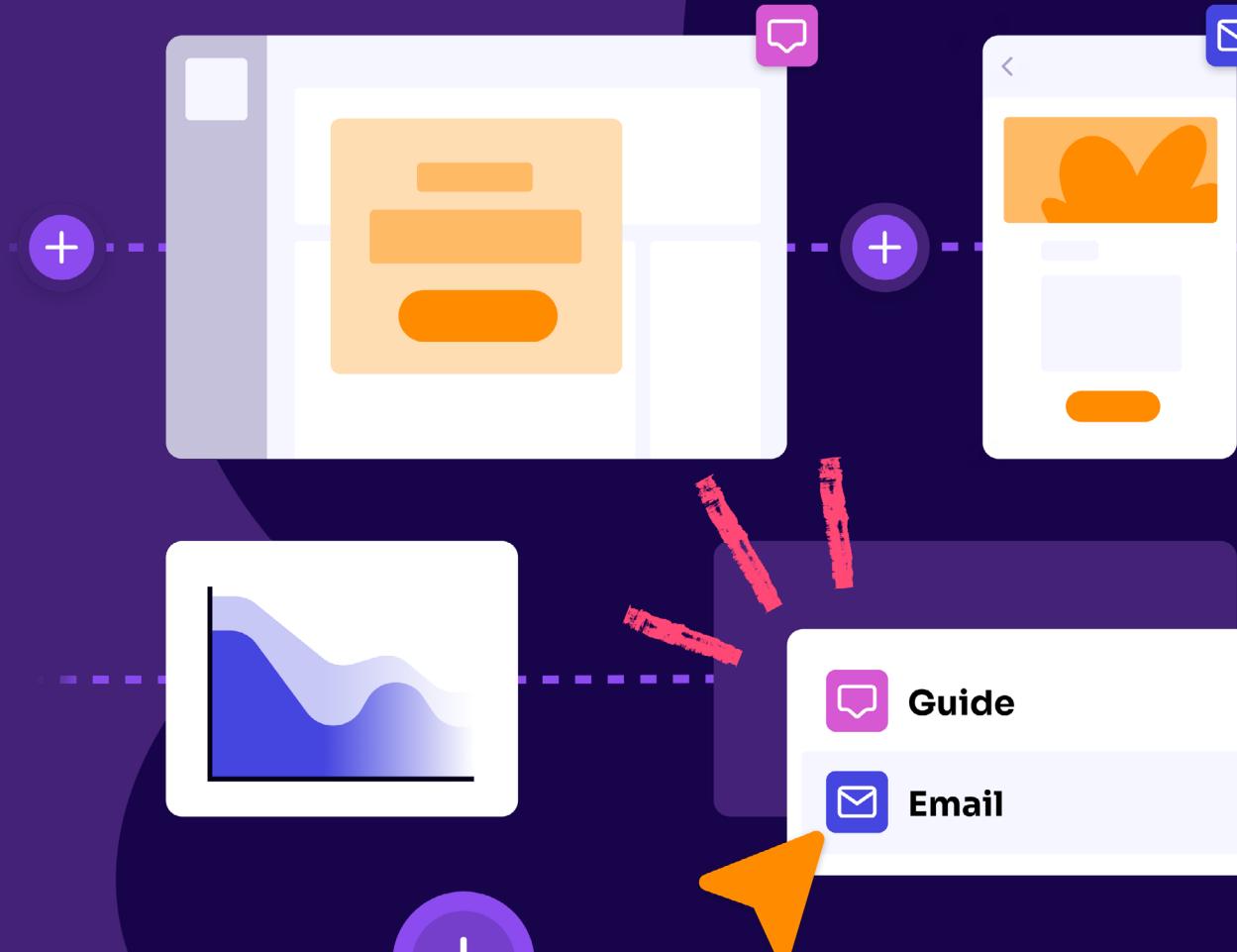




# 10 ways to elevate your product communications with in-app guidance and email



From announcing new features to sharing educational resources, in-app communication has long been the best way to connect with users. But what if users don't log in often (or at all) to engage with your communications?

Even if you THINK you've nailed personalized product communications, only focusing on in-app messaging may not yield the results you're hoping for. That's why the best product teams are embracing another channel to their efforts: Email.

Don't worry, in-app guides are alive and well. But the truth is, not every user is logging into your product. A single email or guide isn't going to change the world. Users need to be nurtured with multiple messages before they decide to take action.

To engage every user, the best product teams align in-app and out-of-app communications into cohesive, personalized journeys. These journeys are evergreen, so product teams can continuously nurture users.

## Cross-channel communications = Your best kept secret

The best journeys are personalized to a user's role, goals, and most importantly, in-app behaviors. But historically, pulling this off was manual, tedious, and riddled with error. Thankfully, new tools (cough, [Pendo Orchestrate](#)) have made this lightning-fast and scalable.

In-app guides are non-negotiable: Your users expect them, and your peers offer them.

Now, product teams are beginning to branch out into new channels: Email, push notifications, and texting (to name a few). Everywhere you use an in-app guide to shape user behavior, you can add out-of-app communications for even better results.

There are four core use cases where personalized communications journeys improve the user experience:

- **Onboarding new users:**  
Use email to bolster personalized, cross-channel welcome experiences that will activate your users and get them to value fast.
- **Driving adoption:**  
From announcing new features to catching users who've abandoned workflows, use email to ensure your customers aren't leaving value on the table.
- **Reducing churn:**  
Connect with inactive users outside your product to re-engage their interest and win them back before they go cold.
- **Engaging employees:**  
Use email and in-app guides to improve employee compliance, onboarding, training, and engagement with personalized, timely messages.

# Best practices for product communications

Every so often, the internet is abuzz with a rogue app notification or test email that wasn't quite ready to be seen. To help you avoid becoming the next "oops" moment, we've put together a list of six best practices for crafting product communications.

## 1. Focus on one core message

Less is more—especially when it comes to communications. Instead, focus on one core message per email. If you need to communicate with users about multiple topics, prioritize carefully and break these out into multiple emails.

## 2. Make next steps crystal-clear

Your CTA is the single most important element of emails and guides. Each of your communications should ask users to do one action. Use actionable language that describes what your CTA button does, like "Sign up now," and design CTA buttons to stand out visually.

## 3. Personalize messaging via segments

Your users want a personalized product experience, even if they don't realize it. In fact, [71% of consumers](#) expect companies to deliver tailored interactions. You can (and should) be personalizing all of your communications by persona, job to be done, technical know-how, geography, language, and even admin level.

Segments, powered by qualitative and quantitative data, give product teams the insight to send the right message, to the right user, at the right time. (And in the right place).

## 4. Don't forget your subject line and preview text

To engage with your emails, users first need to open it—and they decide if it's worth their time via your subject line and preview text. Write clear, specific subject lines and use A/B testing that focus on the value the email is providing for your audience.

You can also improve open rates by:

- ◆ Keep subject lines shorter than 50 characters, and preview text shorter than 90 characters.
- ◆ Personalize communications with data like name, company, persona, or pain point.

## 5. Don't ignore communications governance

In-app guides and emails should be vetted carefully. Failing to review customer communications—or sending too many messages—can lead to confusion at best, and lost customers at worst.

Proper governance ensures that your communications meet security standards and align with your company's messaging framework. They also help prevent unnecessary overlap and help all of your teams collaborate effectively.

## 6. Don't send too many (or the wrong) communications

Bombarding users with too many emails and guides can lead to fatigue, unsubscribes, and ignoring important messages. Make sure every message counts and stay mindful of your user experience with behavior-based personalization and message throttling.

# 10 ways to use cross-channel communications

## 1. Personalized onboarding by persona

Onboarding journeys that use in-app guides and email are nearly [four times as effective](#) as guides-only onboarding. And personalizing your onboarding around a new user's role/permissions, job to be done, pain points, or product area can make even more impact.

When a user logs into your app for the first time, that's the time to poll them about themselves. If a new user tells Pendo they're trying to view product data as a customer success manager (CSM), we send them resources for each of those topics during their first week in Pendo.

By exposing users to tailored content early in their user journey, they know these resources are available when and where they need it. These emails usually see high levels of engagement because users are receiving content that is personalized for them.



Thanks for telling us you want to use Pendo to analyze your product data! Below, we'll show you how Pendo analytics can help you answer questions about adoption, retention, and more.

### Uncover user behavior insights

Try out a guided walkthrough of these key Pendo reports to see the insights they can help you discover.

**Paths:** How do users navigate through my app?

[Build a path →](#)

**Funnels:** Where are users dropping off? Where's the friction point?

[Build a funnel →](#)

**Retention:** What percentage of visitors come back to my app month over month?

[Analyze retention →](#)

**Data Explorer:** What roles adopt feature X the most? How has my app grown over the last X months?

[Build a custom report →](#)

## 2. Nudge inactive users

What if a user hasn't logged into the platform in a while? They can't see your in-app guides, so they can't reach their 'aha!' moments or experience the value of your platform. Inactive users miss out on value, so they're at risk of churn.

To combat this, automated email reminders paired with in-app guides can help bring dormant users back and show them your product's full potential. If a user has been inactive for a set period of time, you can trigger an email that nudges them back in-app and toward a core event. (You can customize this based on the level of inactivity that indicates risk for your customers). When they log back in, automatically trigger an in-app guide that points them directly to the feature or product area that's most relevant to their goals.

visitor1@Cadence.com

Overview Feedback

Phone: Last 60 Days [Apr 26, 2022 - Jul 26, 2022]

DETAILS (1)

PENDO SETTINGS

Visitor Name: visitor1@Cadence.com

Browser: Chrome

Browser Version: 79.0.3940.79

Device Name: macbook-pro-m1

First Visit: Sep 26, 2020 4:41:10 PM EDT

Last Visit: Jul 26, 2022 10:42:21 PM EDT

Sample Group: B

Visitor List: This visitor is not included in any analysis. [Read description](#)

Hide guides from this visitor:

Do Not Process (20798):

visitor1@Cadence.com

Apr 26, 2022

Home CRM

Hi Product Details

Search Visitor Activity

More filters (1)

Timeline: Apr 26, 2022 (1)

Clicked Navigation - Accounts (1)  Home CRM  Navigation

Entered Dashboard (1)  Home CRM  Dashboard

All Visitors: Show Your Feedback Step 1 (1)  Home CRM

Click image to enlarge

**NEW** **Visitor Activity**

Explore the **journey of an individual visitor** on a specific day. Discover how visitors navigate your app, what events they interact with, and where they get frustrated.

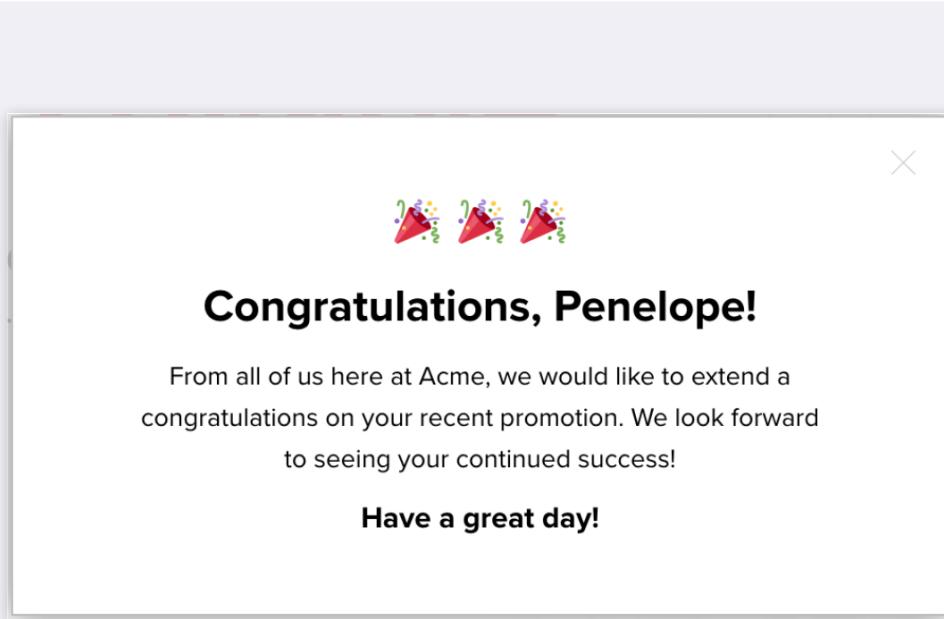
- What features or pages does this user interact with?
- What action did the user take after interacting with a guide?
- Where is the user getting stuck?

## 3. Celebrate user milestones

User milestones, whether they're tied to in-app achievements, time, or account updates, are an opportunity to celebrate your users.

Build 20 (or 200) reports? Spend a full 365 days as a customer? Unlock a core feature? Get promoted? All of these usage-based milestones deserve to be celebrated. They also show your users that you see and value them.

Send an email that brings users in-app, and continue the good vibes after they log in with an in-app message.



## 4. Promote live and on-demand trainings

Your product team spends a lot of time building and shipping new products. Make sure they get the attention and adoption they deserve by training your users on them.

At Pendo, we encourage users to deepen their knowledge by inviting users to join live trainings and workshops that are most relevant to their use case.

Customer education teams can keep promoting this in-app, and automatically turn these off when users complete a training. Orchestrate's AI-powered behavioral data makes this level of personalization scalable and accurate.



Join us for Pendo's expert-led live trainings this November!

**Get started with the fundamentals of Pendo:**

- [November 6](#) - New user overview: Platform overview
- [November 13](#) - New user overview: KPIs you can achieve with Pendo

**Workshop-style exercises with the Pendo team:**

- [November 14](#) - Analytics for Customer Success teams
- [November 19](#) - Establish a foundational data strategy

Register now to save your spot. For a comprehensive overview of all upcoming live training sessions available, view the [live training calendar](#).

[Live training calendar](#)

## 5. Encourage employee open enrollment

We've talked about using Orchestrate for your external users, but what about your internal employees? Digital adoption platforms (DAPs) are extremely valuable tools when guiding behavior and improving workflows. If you're an internal product manager (PM) or IT manager, use Orchestrate to drive core actions, like open enrollment or compliance training.

Pendo's HR team used Orchestrate to prompt users to complete benefits elections. When an employee logs into our workforce management system, in-app guides will walk them through the benefits election process.

## US Open Enrollment: Actions and due dates

Open Enrollment starts October 31! It's passive again this year, meaning if you don't take action, some of your current elections carry over from last year.

**What doesn't carry over?** FSA elections. You must go through the Open Enrollment process to extend or add an FSA plan for 2025.

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**What's Changing in 2025?**

- **Pendo is moving our national carrier from BlueCross BlueShield of NC to Cigna.**
- **HDHP Employee Only payroll deduction is back to \$0.**
- **Pendo is putting more \$\$ in your HSA.**
  - Employee Only coverage from \$750 to \$900 per year.
  - Employee + Dependent(s) coverage from \$1,500 to \$1,800 per year.
- **HSA Administration is moving from Navia to Fidelity.**
  - More information to come after Open Enrollment on how this will affect your current account.

## 6. Sales enablement

In addition to emailing your internal workforce about benefits enrollment, companies can also use cross-channel journeys to help their revenue team hit sales targets.

Pendo's own team uses Orchestrate to promote relevant content, share competitive enablement assets, and keep sellers on-track with pipeline goals. First, our revenue enablement team identified sellers that hadn't created a product-focused opportunity for a specific product area. Then, they emailed them with links to micro-lessons reps should complete to learn about the product. This kicked off a guided, in-app training flow where they could provide feedback on any outstanding questions.

By adding email into their approach, our revenue team was equipped with the knowledge to do their jobs even better, and without disrupting daily workflows.

## 7. Share relevant resources

Your users could comb through thousands of articles on your support site, or you can proactively surface the most relevant resources for their role, permissions, product areas, and goals so they feel supported, not overwhelmed.

If a new Pendo user is an admin focused on Analytics, we email them a course specifically around setup and configuration to help them navigate their responsibilities



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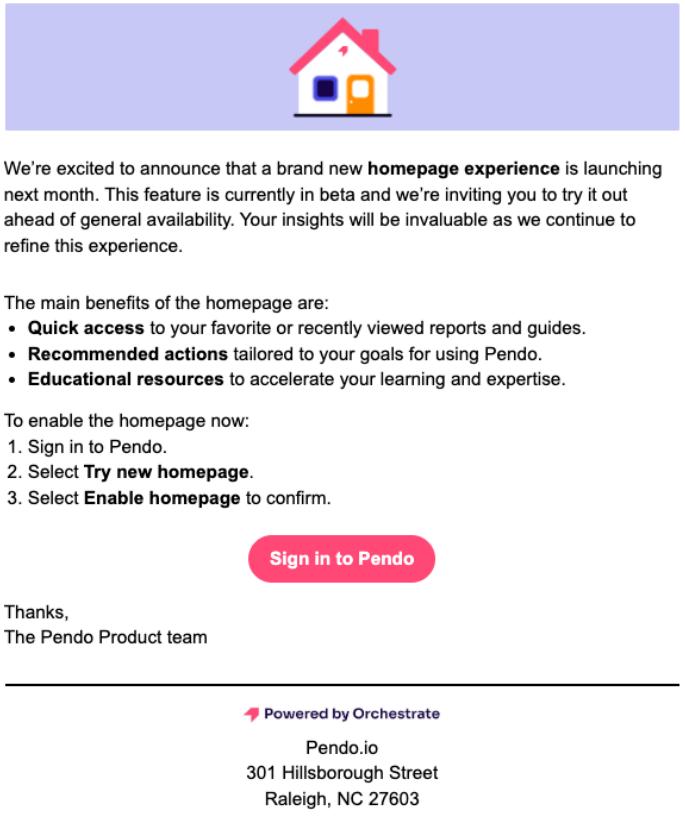
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[Live training calendar](#)

## 8. Promote and upsell new features

Upselling and other product-led growth (PLG) motions are a major opportunity for cross-channel communications. With Analytics' AI-powered insights and segments, you can send relevant upsell and cross-sell messages to your users. PMs can also use email to promote features that are new to the products users are currently paying for. To do this, use Orchestrate to send a newsletter with all the critical information on a user's product(s) in use, like updates and release notes.

At Pendo, we used Orchestrate to announce our new personalized homepages, which is now available to every Pendo user. Because this is a BIG change to Pendo's UX, we gave customers the option to opt-in to this functionality. Later, we can use segmentation to target in-app communications to only those users who haven't opted-in.



The screenshot shows a newsletter message with a purple header featuring a house icon. The main text announces a new homepage experience, highlighting its beta status and benefits. It includes a list of three main benefits, instructions for enabling the feature, and a 'Sign in to Pendo' button. The message concludes with thanks from the Pendo Product team and is powered by Orchestrate.

We're excited to announce that a brand new **homepage experience** is launching next month. This feature is currently in beta and we're inviting you to try it out ahead of general availability. Your insights will be invaluable as we continue to refine this experience.

The main benefits of the homepage are:

- **Quick access** to your favorite or recently viewed reports and guides.
- **Recommended actions** tailored to your goals for using Pendo.
- **Educational resources** to accelerate your learning and expertise.

To enable the homepage now:

1. Sign in to Pendo.
2. Select **Try new homepage**.
3. Select **Enable homepage** to confirm.

[Sign in to Pendo](#)

Thanks,  
The Pendo Product team

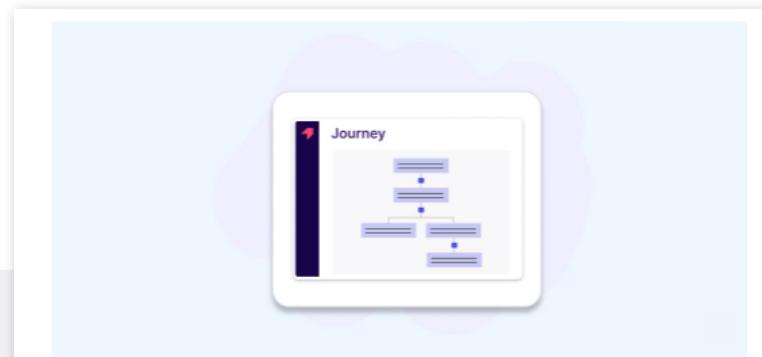
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Powered by Orchestrate  
Pendo.io  
301 Hillsborough Street  
Raleigh, NC 27603

## 9. Manage beta programs

One of the best ways to invite users to your beta programs, gather feedback, and communicate deadlines is through email.

When launching a new beta feature via email, use behavioral data to identify which users are most likely to participate. At Pendo, we used Orchestrate to onboard our beta users. (Email-ception?).



### Say hello to automated messaging journeys

With your access to the Orchestrate beta you can easily build and automate behavior-based messaging *across channels*.

Build a journey today to onboard new users, promote a new feature, or do what we're doing right now and use journeys to drive beta adoption. The possibilities are endless!

[Build my journey](#)

Have questions about using Orchestrate or need help getting started? Let us know by [filling out this form](#) and a member of our team will be in touch.

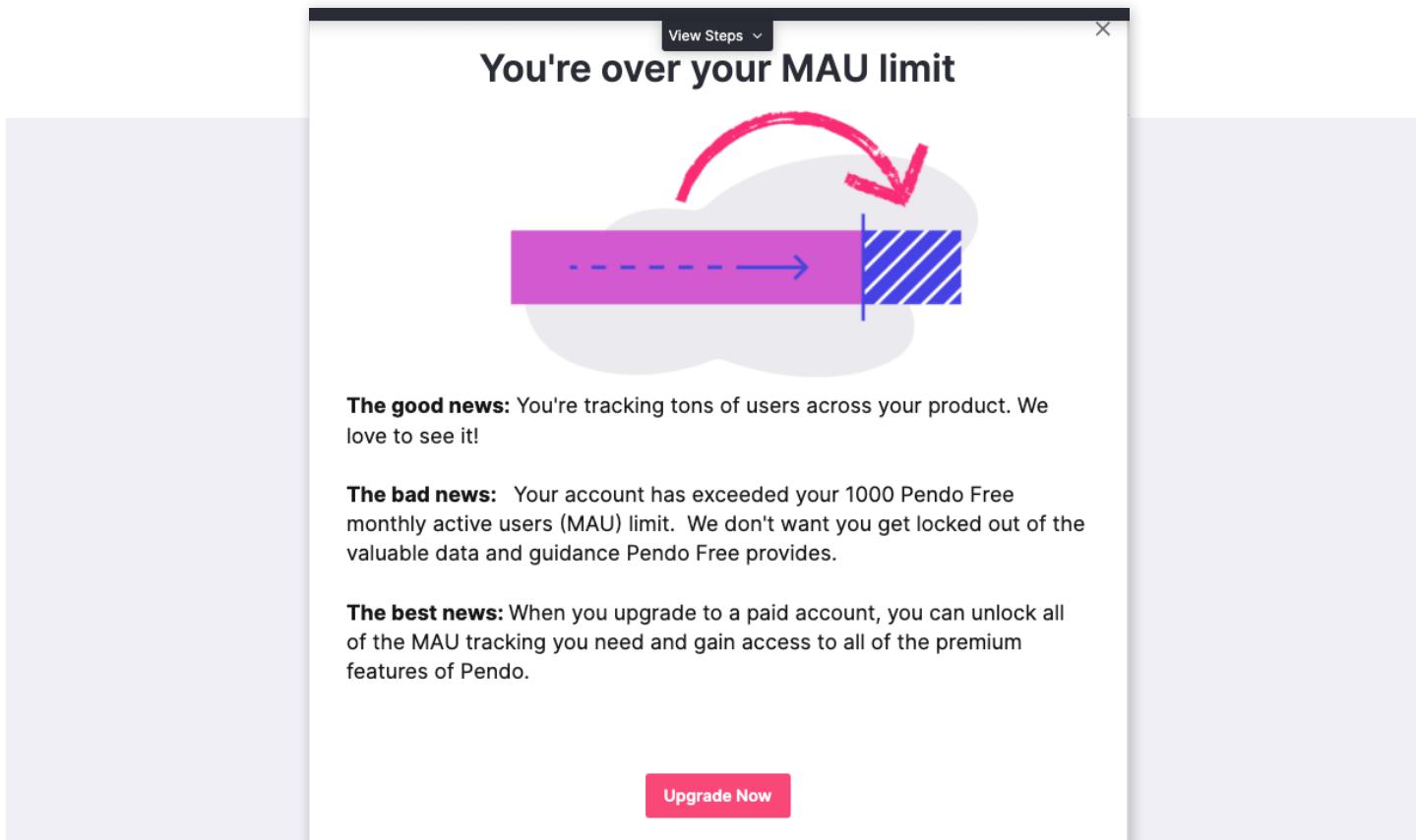
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 Powered by Orchestrate

## 10. Free trial upgrades

If you offer free product trials, your product-led growth team can lead users down conversion paths inside your product. One way to do this? Using guides and email to educate free users about paid features, then show them how to upgrade.

You can also use AI-powered behavioral data and product usage data in Pendo to identify which features or workflows drive conversions most effectively. Then, create communications journeys that steer users to those particular features or actions in your product.



**Product teams that combine in-app and out-of-app communications are one step closer to deeper engagement, adoption, and growth.**

**To get started,**  
[take a self-guided tour of Orchestrate](#)  
**or**  
[request a demo](#)



Pendo helps teams of all sizes put their product at the center of their business so they can create the best customer experiences possible. With Pendo's complete product adoption platform, you can combine retroactive usage analytics, in-app messaging, and feedback tools to better understand, guide, and close the loop with your users. And it all works at scale—no coding necessary. Pendo customers include the world's leading software companies and digital enterprises, including Verizon, Morgan Stanley, LabCorp, OpenTable, Okta, Salesforce, and Zendesk.

Learn more: [www.pendo.io](http://www.pendo.io)