



In-app guides for urgent comms

How to communicate with your users where and when it matters most



In-app guides are a great tool for delivering support to users. From onboarding to feedback solicitation to cross-sell or upsell promotions, in-app guides are increasingly the channel of choice for companies to engage with users. They're also an important tool for communicating with customers during emergencies or when sensitive information is at stake. Why send an urgent message via email only for it to languish buried in someone's inbox when you can reach them directly—in the app itself as they're using it?

Here are four things to keep in mind as you build out your in-app guides strategy for urgent comms:

1. Form the right cross-functional team

What constitutes a crisis for a business is to some extent subjective. It will depend on considerations like industry, the nature of the product, how an SLA (service-level agreement) contract with customers is structured, and countless other factors. Yet regardless of what the emergency looks like, companies should have a cross-functional team in place to address it—including by leveraging Pendo where appropriate.

Often called an "incident management" team, this group should consist of members from across relevant parts of the org to answer key questions like:

- When does the company post a communication on a crisis?
- How to post? Is this a situation where it makes sense to use Pendo in-app guides?
- What should the content of the guide say? How much detail should be included in the guide vs. in other channels or locations?

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2. Decide whom to communicate with—and segment accordingly

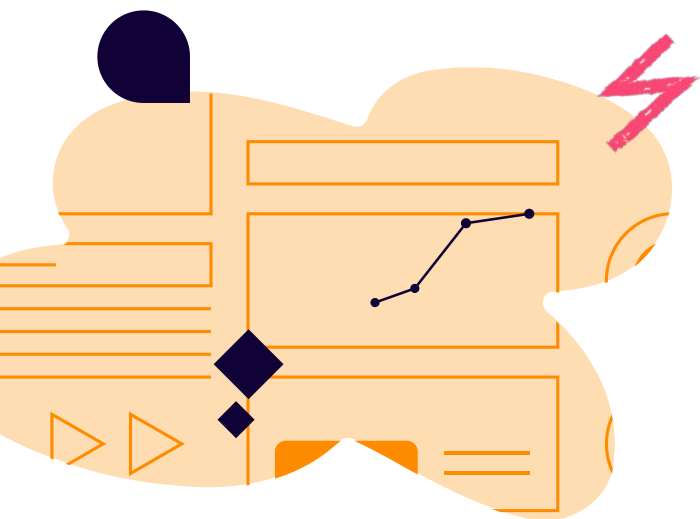
Depending on what the crisis is, it may make sense to send out a guide to your entire user base or target only a specific segment of them. Remember, you want to reach only those for whom it's relevant, not bombard and annoy those for whom it's not. To that end, take advantage of Pendo's robust segmentation capabilities when deploying your guide. Segment users by metadata (such as location) or behavior (whether, for example, they regularly engage with a key feature that is down) so that you're getting the right message to the right users at the right time.

3. Have guide comms templates in place and at the ready

Using Pendo to build guide templates around crises that could affect the business will allow companies to move faster and reach their users in real time. When building these templates, incident management teams should note that certain [guide styles](#) lend themselves better to certain kinds of communications. For crisis comms, Pendo customers have found success leveraging the banner style, which spans across the entire width of the top or bottom of a page. This makes it great for announcing an important message without obstructing a user's entire screen.

4. Give the right updates the right way

If a crisis is high severity, a company may need to give users updates on a regular basis. When it does, it should plan out how to use guides most effectively. Rather than bombard and potentially alienate users with continual new guides giving updates, for example, teams should consider deploying a Pendo guide for its initial alert to users, and then directing them to the [Resource Center](#) for subsequent updates and announcements.



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