

2. Explore Customer Success Stories

1. Landing Page

• Filter by Industry or Use Case: Allow customers to filter stories to see those most relevant to their business.

• Contextual CTA: Encourage users to sign up with a CTA like, "See how we can help you achieve similar results!"

• Story Highlights: Provide quick stats and results achieved, such as "Increased KPI accuracy by %40."

• Interactive Story Summaries: Short videos or interactive infographics that summarize the story.

- Interactive Banner: Show highlights like trending customer success stories, a quick "how it works" explainer, or special offers.
- Personalized Call to Action (CTA): Use dynamic CTAs based on user source, such as "See Success Stories" or "Watch the Demo."
- Guided Navigation: Offer tooltips that explain where each section (Stories, Demo, SaaS Tools) will lead them.

Landing Page Explore Customer View Product Demo Success Stories Learn about Benefits Sign Up to Get Started Account Setup Add Organization Details Link Existing SaaS Tools Set Up KPI Monitoring

Explore Predictions

and Alerts Setup

3. View Product Demo

- Self-serve Demo or Live Demo Option: Offer both a recorded product demo and an option to book a live walkthrough with a sales rep.
- Interactive Product Walkthrough: Include clickable hotspots within the demo where users can get more information on specific features.
- In-demo Tips and Pop-ups: Feature short tips on how to use key features, with links to deeper dives or use cases.
- End-of-Demo CTA: "Ready to get started?" with a link to the sign-up page.

4. Browse SaaS Tools Library

- Search and Filter by Category: Help users easily find tools by category, e.g., "Marketing" or "Finance."
- Tool Compatibility Check: Allow users to enter their current tools to see compatibility or possible integrations.
- Feature Overview Cards: Show quick facts and a mini overview for each tool.
- Contextual CTA: For example, "Sign up to connect these tools with KPI monitoring."

5. Learn about Benefits (Benefits Summary)

- Personalized Benefit Highlights: Based on earlier selections or interest areas, highlight how the platform meets specific needs.
- Interactive Calculator: Show potential ROI, time savings, or efficiency improvements.
- Customer Testimonials: Show dynamic quotes from similar industries or roles.
- CTA Options: Present both "Sign Up" and "Schedule a Call" options to capture both self-serve and guided customers.

6. Sign Up to Get Started

- Simple Form with Auto-fill Options: Make it quick with integration to autofill company details based on business email.
- Progress Tracker: Show a visual tracker to indicate progress (e.g., "Step 1 of 3").
- Support Options: Link to support chat or FAQs for quick help.

7. Account Setup

Browse SaaS Tools

Library

- Guided Tour: Offer a mini walkthrough of the setup process, pointing out major fields and options.
- Clear, Helpful Copy: Provide examples and descriptions next to each field.
- CTA to Next Step: Directly guide the user to the organization setup.

8. Add Organization Details

- Smart Suggestions: Provide examples of KPI metrics based on industry (e.g., "Revenue Growth" for a financial company).
- Field Autofill with Contextual Help: Show descriptions or examples when hovering over fields.
- Option to Invite Team Members: Give users the choice to bring in team members for collaborative setup.

9. Link Existing SaaS Tools

- Suggested Tools List: Show suggested tools based on the organization type and customer role.
- Step-by-step Integration Guides: For each tool, provide easy guides and show integration success upon completion.
- Security and Privacy Info: Address common security concerns with tool integrations through tooltips or FAQs.

10. Set Up KPI Monitoring

- Predefined KPI Templates: Offer templates based on industry or role.
- Drag-and-Drop KPI Setup: For ease, allow customers to set up KPIs using a visual, drag-and-drop interface.
- Auto-save and Back Option: Let users save progress and return without losing data.

11. Explore Predictions and Alerts Setup

- Quick Setup Wizard: Guide the user in defining KPIs for which they want alerts.
- Interactive Tips and Use Cases: Explain how to customize alerts and prediction settings effectively.
- Preview Example Scenarios: Show users examples of how alerts will appear in their dashboard.
- Onboarding Completion CTA: "Your account is set up! Let's start monitoring your KPIs" directs users to their dashboard.