

# Email automation for SaaS businesses

Automation can make a lot of what we do more efficient. More importantly, it can make what we do better.





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Very few of us have the time to tailor every single piece of communication to individual customers, or even groups of customers. With automation we can set up ‘flows’, or ‘drips’, of emails so that customers receive communications that are tailored to them and your team don’t spend all day in their inbox.

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## IN THIS GUIDE YOU'LL FIND:

### **p04**

#### A tailored guide to email onboarding for free trial users

If you run your SaaS business with a free-trial model then start here. This group of users requires personalised communications that inspire and engage them in a short time frame as you nudge them towards converting at the end of their trial.

### **p15**

#### A personalised guide to email onboarding for freemium users

With a freemium model you have a much longer time frame in which to convert your free-users into paying customers. This doesn't mean you can sit back and relax though. Tailored and targeted communications help to educate your freemium users to see increasing value in your product and move towards becoming a paid user.

### **p26**

#### 7 SaaS welcome email examples to inspire you

This final section helps you to get inspired and design your own welcome email flow for new customers. First impressions are so important and these clever automated emails will show you how to make the most out of your 'hello'.



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# A tailored guide to email onboarding for free trial users





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## Email onboarding is your most important channel for converting free trial users into paying customers

How many of your free trial users convert to paid customers? The number could be 20% or 25% or 11%, or maybe lower. Wherever your number is at currently, there's a good chance that email onboarding is your secret weapon to converting more free trial users.

Successful email onboarding requires the right strategy, copy,

design, and automation. Plus, continued testing is needed to make incremental improvements.

Keep reading to learn more, and be sure to sign up for GoSquared, so you can get access to free Analytics, free Live Chat and be among the first to hear about our upcoming automation product!

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## What is email onboarding?



Email onboarding is helping new users or customers onboard to your product via email, so that they experience the product's value sooner and are more likely to convert to a paid customer or to keep their subscription active.

Email onboarding has a lot of uses: everything from onboarding clients for a service to onboarding new employees.

In this post, we're focusing on using email onboarding to convert free trial users.

*Remember: we are about to launch GoSquared Automation where you will be able to put all the lessons from this post into action. Reach out to us if you'd like to be one of the first to try it out!*

## Email onboarding strategy

The most important requirement of your email onboarding flow is that it guides users to the “Aha!” moment faster, or the moment at which users first experience value and see that your product is worth the cost.

### Discover your real “Aha!” moment with customer survey questions and user testing.

Your “Aha!” moment might not be what you think it is, and that’s fine. Start with a hypothesis and go from there. Here are some examples of hypotheses:

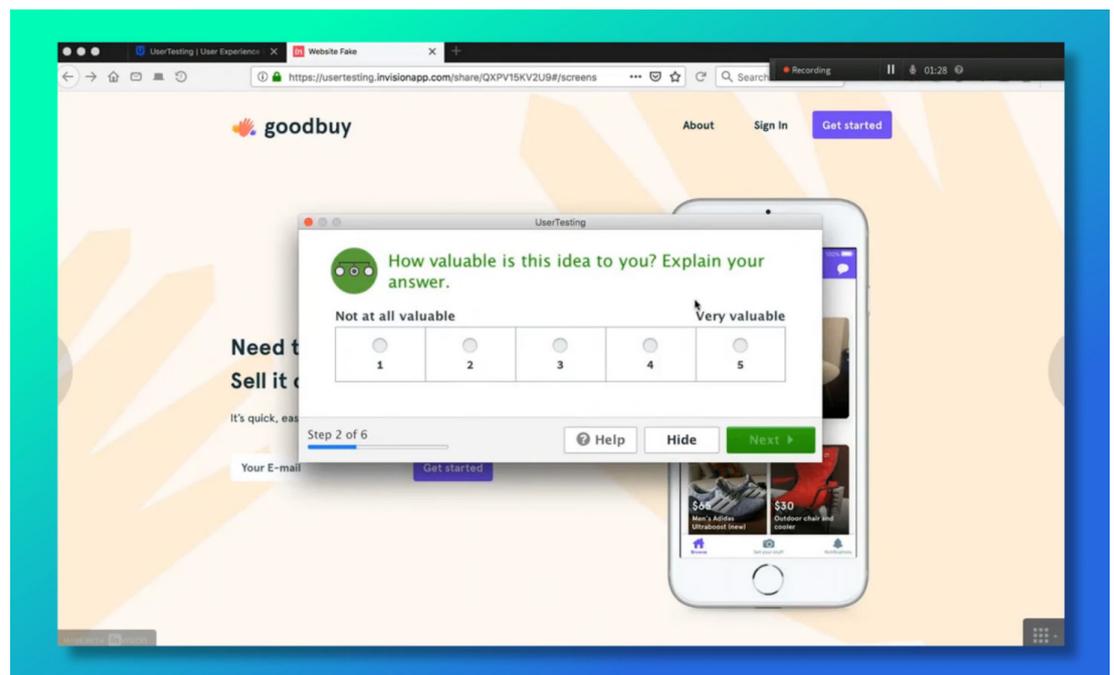
- Our product’s “Aha!” moment is when a user adds a task to a team calendar
- Our product’s “Aha!” moment is when

a user listens to an audio track for at least 5 minutes

- Our product’s “Aha!” moment is when a user finds at least one prospect’s email address

Because your email onboarding focuses on this “Aha!” moment over all other features and functions, you first need to be sure you’re guiding users to the right thing.

There are two smart ways to test whether your hypothesis is true or not before proceeding with creating or upgrading your email onboarding: user testing and customer surveys.



You can use a tool like [UserTesting](#) to record real user sessions and ask questions on their journey.

For the most valuable information, you should analyze sessions from new users. You can offer an extended free trial (6 months or more) in exchange for the person’s time.

Customer surveys are also useful in validating your “Aha!” moment. These are the top questions (learned from [Claire Suellentrop](#)) that will help you understand why users convert (send them to all of your users or an active subset):

1. How did you discover PRODUCT NAME and what made you decide to try it?
2. What happened when you first tried PRODUCT NAME that you made you convinced it could help you OUTCOME?
3. Why did you decide to become a customer of PRODUCT NAME?
4. What tasks can you achieve with PRODUCT NAME?
5. How were you handling all of these tasks before?
6. What feature(s) of PRODUCT NAME could you not live without?

By getting real user feedback from both new users and paying users you can discover the first time your product shows value, and make that the highlight of your onboarding.

*Remember: your email onboarding doesn't need to guide users to every type of value they can receive from the product, but instead the biggest, best, most immediate value.*

## Email onboarding copy and design

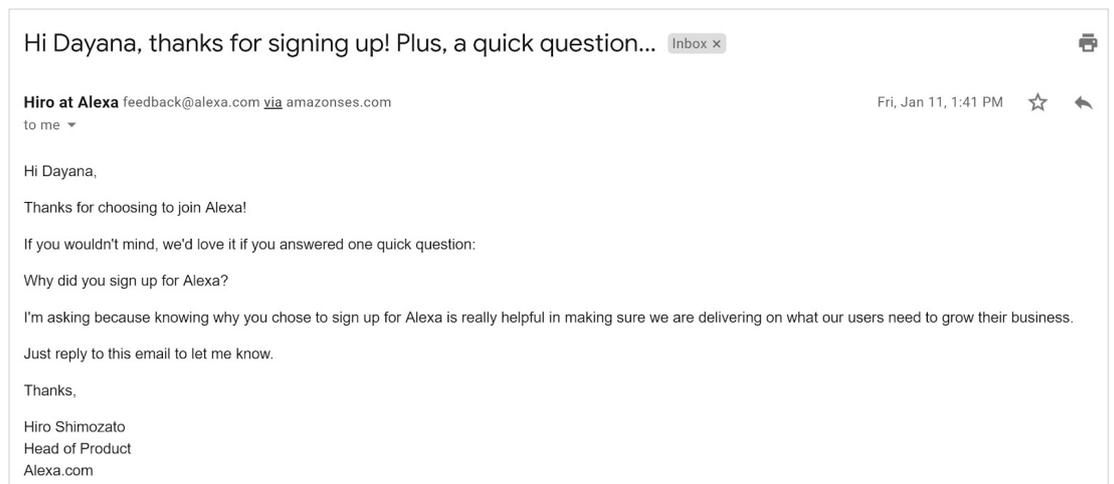
Now that you know what you need to guide users towards, it's time to perfect your actual emails.

### Should your emails be designed or plain text only?

Entrepreneurs and product marketers ask this question often: should we use designed emails or plain text emails? There's no right or wrong answer, but there are some important distinctions that can help you decide.

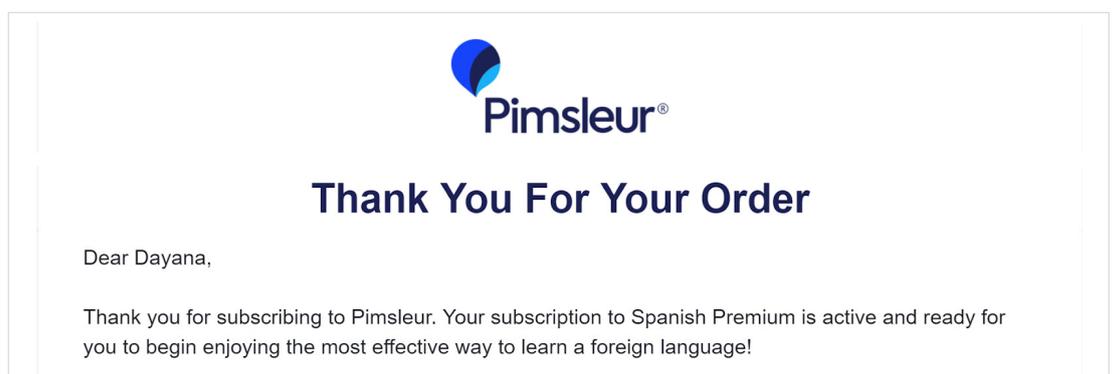
■ **Designed emails:** Best for product-focused emails like guiding people back to the product, signing in and using a feature because they can be designed in a way that feels like your product

■ **Plain text emails:** Best for sales follow-up or asking for feedback because they feel more like a personal email, even when automated



In this example of a plain text email, the Head of Product at Alexa (Amazon's SEO tool) asks for feedback on why the new user has signed up in the first place.

**Onboarding welcome email template**  
Getting the first email right is critical. The longer that new free trial users wait to use your product, the less likely they are to log back in and later convert. You want them to use the product while the memory of signing up is still fresh.





**Customer and Order Information:**

Order #	~
Login ID:	~
Payment Method:	<b>CreditCard</b>
Customer Name:	~
Customer Address:	~
Subscription:	<b>7 day free trial then \$19.95 per month</b>
Language:	<b>Spanish Premium</b>

**Here's How To Get Started:**

**1**

Download the apps



**2**

Practice everyday



**3**

Speak out loud



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**Learn with Alexa**

Once you've created your account, access your courses on Amazon Echo and other Alexa devices by enabling the Pimsleur Skill. Say, "Alexa, Play Pimsleur," and she'll take it from there!



**Get Free E-Book**

As a thank you for your order, you have access to Dr. Paul Pimsleur's groundbreaking book, How to Learn a Foreign Language.  
**Download it today!**

In the example from Pimsleur (language learning app), a new free trial user is given an initial email that thanks them for their order. Payment will begin 7 days later, so framing it as an order helps

remind them of that.

Then the email follows up with the steps they want users to take, as well as the free resources.

### Here's the template for recreating this email:

Thank you for your order  
Hi {Firstname},  
Thank you for subscribing to {Product}!  
Your subscription is active and ready for you to begin enjoying {Outcome}.  
{Order details only if a credit card was required} Here's how to get started:  
{2 or 3 steps to guide users to the "Aha!" moment quickly}{Resource 1, such as a device they can use}{Resource 2, a learning guide like an ebook or webinar}

And here's a great resource for more [customer onboarding templates](#).

### Onboarding email subject lines

To convert more free trial users into customers with email, you need them to open your emails. Test a variety of email subject line styles, including very short, conversational ones and more informative ones. Here are some examples:

### Monday.com

A reminder about your invitation to monday.com

### FreshBooks

Hey {Firstname}, How's Your Business Doing?

### FreshBooks

Your Secret Weapon to Small Business Success

### Sprout Social

How to stay above water in your social inbox

### Sprout Social

Reports that make you look good

### Sprout Social

Followup...

### Alexa

quick question

### Alexa

Hi {Firstname}, thanks for signing up!

### Alexa

Hi {Firstname}, what is your first impression?

Copywriting formulas can help you nail your subject lines with no guesswork.

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## Email onboarding automation



How you'll automate your email onboarding dictates much of what you'll be writing and designing as well.

Long term, you should shoot for email onboarding that relies at least in part on user behaviour. However, setting up

trigger-based email onboarding can be a massive project. You might not be able to invest in it right now. If that's the case then a drip campaign sent to all free trial users is your best starting point.

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*into action. Reach out to us if you'd like to be one of the first to try it out!*

We know you're probably eager to get started, so we've included two of our popular blog posts below so you can dive right in.



### Find the Best Keywords for Your Website

[Read more](#)



### What are Buyer Keywords and How Do You Find Them?

[Read more](#)

We look forward to watching you grow.

Cheers,  
The Alexa Team

#### **Triggered by user behavior (or lack thereof)**

Email onboarding that is based on user behaviour has the opportunity for greater success because it is catering the tips, tricks and advice to what the user is most likely to need. Here are four categories of users that can set-up specific emails for during your free trial:

- Actively logging in and using high-value features in the app
- Logging into the app but not using high-value features
- Hasn't logged into the app in a certain amount of days during free-trial
- Hasn't logged into the app at all during the free trial

Someone who has logged into your app 10 times during your free trial is going to need a different message than someone who hasn't logged in at all. For the active free trial user, you'll want to guide them deeper into the product and to an additional value beyond the "Aha!" moment.

For the inactive user, you'll still be guiding them to the "Aha!" moment, though later in your sequence you may try a different avenue, such as offering a personal onboarding call or sending them different help desk articles.

In the following example from Alexa, a notification email for a site audit (sent during the free trial) is used to offer an ebook.

## Want to get more out of Alexa?

Learn how to improve your search performance and drive more traffic with these SEO tools from Alexa.

[Download the Free eBook >>](#)



[f](#) [t](#) [e](#)

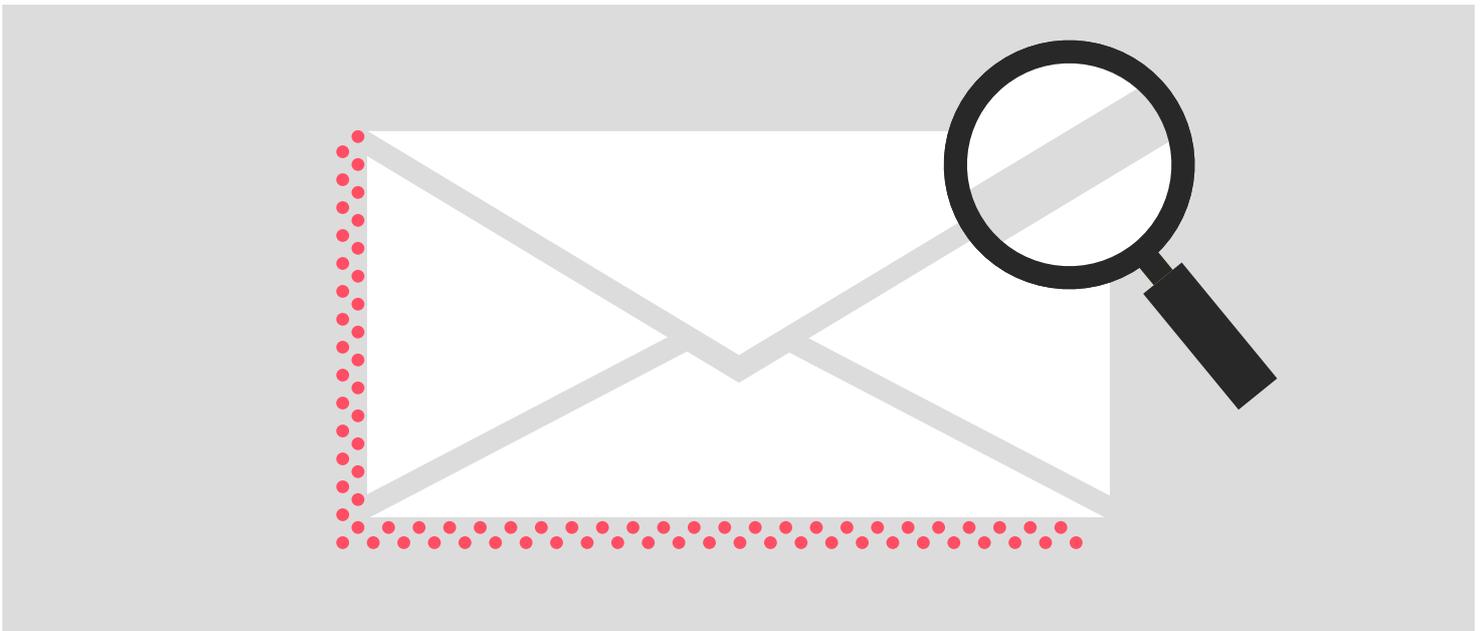
You are receiving this email because you subscribed to an Alexa.com plan.  
Alexa Internet · 525 Market Street · Suite 1900 · San Francisco, CA 94105 · USA

The lesson here is that all sorts of product-based actions can be used to deepen the onboarding experience. If your product sends notifications when report

downloads are ready, or for anything else, you can make use of this precious attention to guide the free trial user to a new resource or feature.

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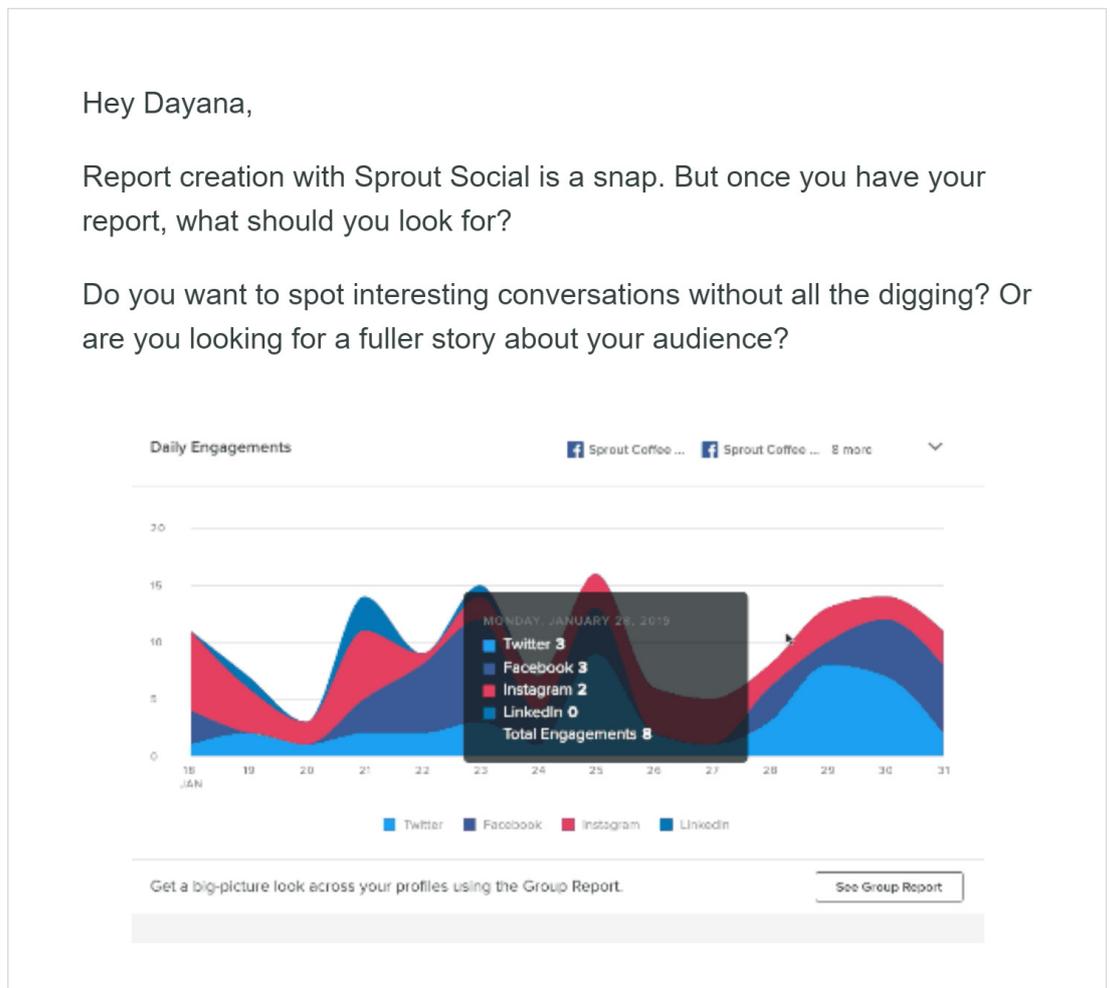
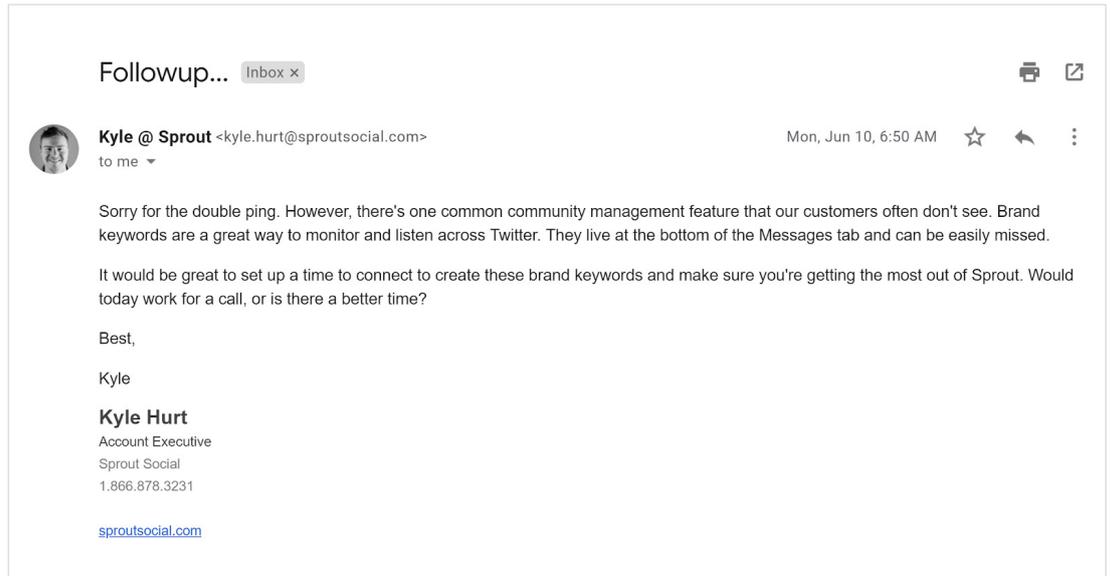
## Email onboarding optimisation



Beyond the strategy, the copy, the design and automation, there's still one more facet on email onboarding to master: optimisation.

Social media tool [Sprout Social](#) sends both sales follow up emails and product

emails that teach free trial subscribers about new features in a pre-set sequence. They can continually test and optimize these individual sequences and also test them against each other. What gets better results?

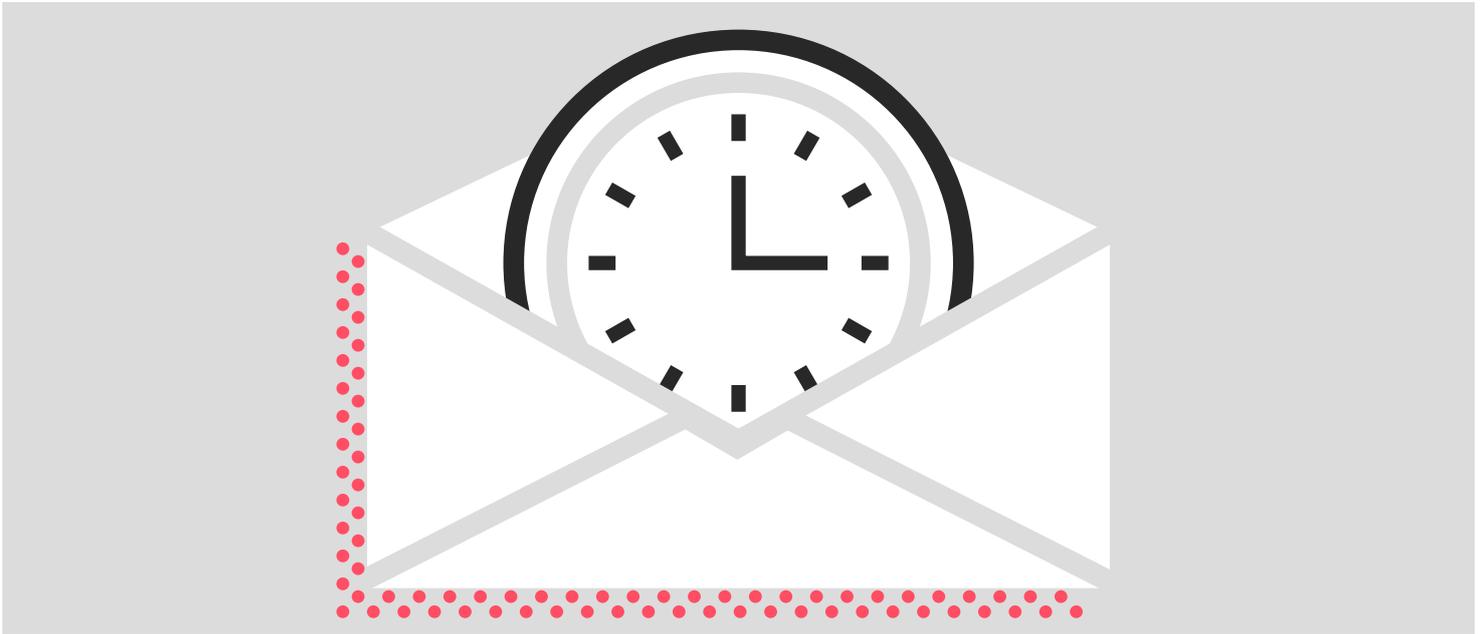


**Here are all of the factors that you'll want to test over time:**

- Click through from email through to log in / product use
- Emails that brought the highest and lowest amount of product use
- Email subject lines
- Featured resources inside of emails
- Steps to the "Aha!" moment
- Different "Aha!" moments and features (in the case of more complex products)
- Email design style

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## Take the time to get your email onboarding right



Email onboarding is easy to overlook when your team is busy building new features and acquiring new users. But everyone who has signed up for a free trial could become a product-qualified lead or even a customer.

When it comes to email onboarding, the ultimate question you need to ask is

this: How can I show up in free trial users' inbox to guide them toward the value they requested by first signing up?

If that still feels mysterious, start back at square one with user testing and customer research. They'll tell you what they need.



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# How to nail your email onboarding sequence for freemium users





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## Turn freemium signups into active users who are more likely to ascend your pricing tiers

Getting traction for your freemium plan might be fairly simple if there's a big demand for your product. Viral sharing is why businesses can afford to jump on the opportunity of product marketing—but there's a catch. Without great onboarding, including an email onboarding sequence, many of your freemium users will quickly become inactive and never convert.

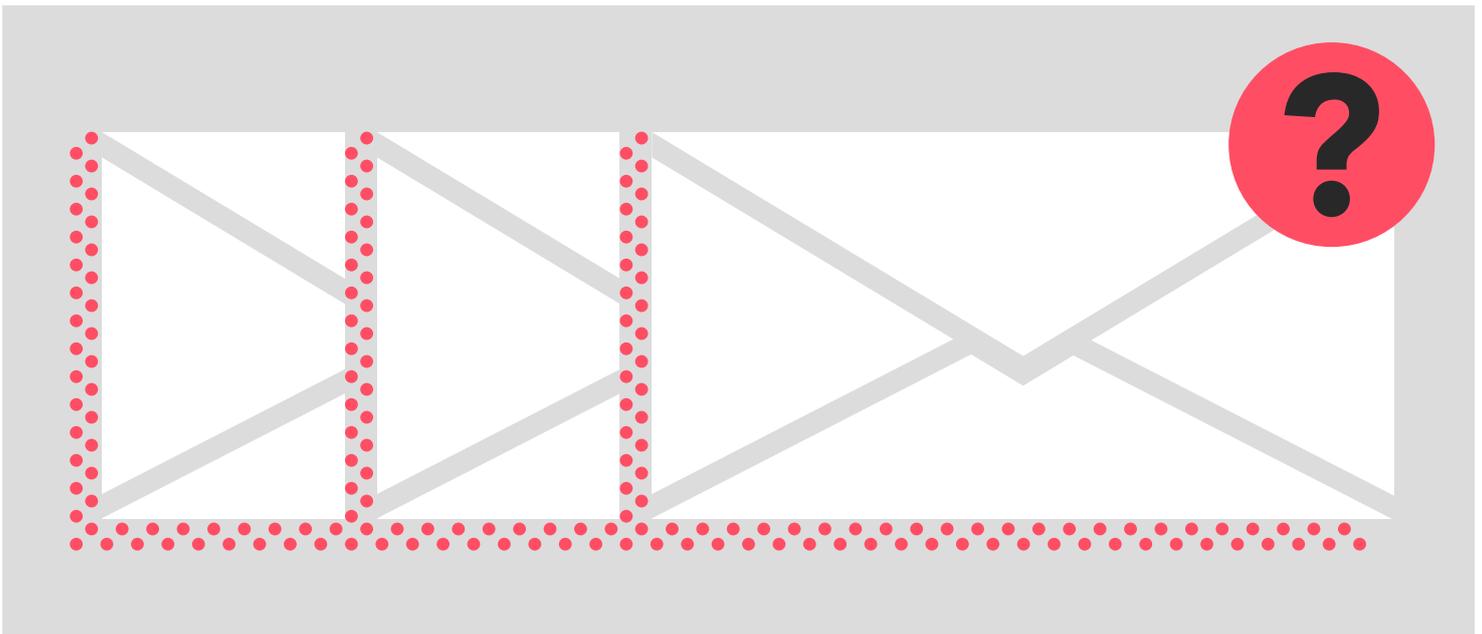
And if your product doesn't have built-in viral sharing (such as sharing a design or video), then you're even more incentivized

to successfully onboard your freemium users. Your cost of acquisition is likely to be higher.

In this post, we're covering how to set up marketing automation that onboards your freemium users so you can turn them into active fans.

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### What is an email onboarding sequence?



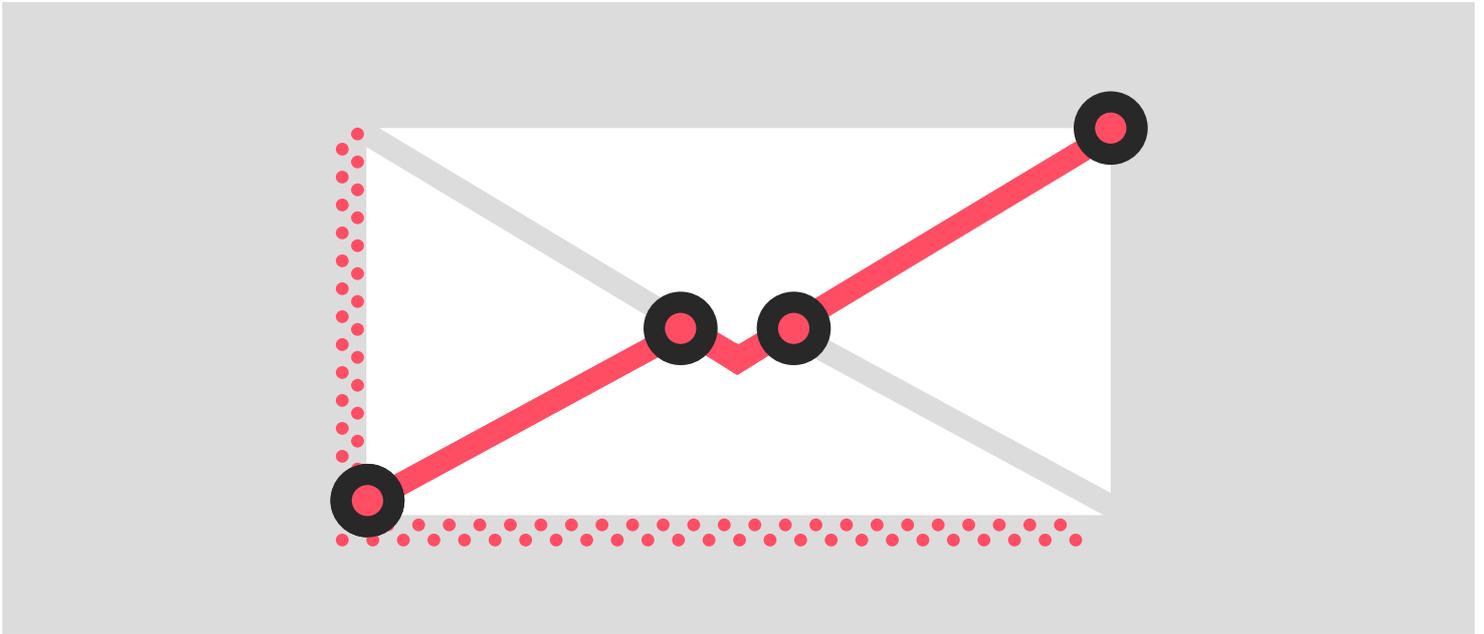
An email onboarding sequence is a series of emails sent to new customers or users to help deepen the relationship they have to your brand, show them how to make the most out of your product and get them using your product as much as possible in this critical first few days.

An email onboarding sequence can be sent to free trial users, freemium users, or

paying customers for a SaaS product, a physical subscription service or a variety of other business types.

Because we're talking about freemium users in this post, we're focusing in on SaaS, since most other business types wouldn't have a freemium offer. In fact, freemium is a big part of what sets SaaS marketing apart.

## How to develop an email onboarding sequence for freemium users



With new freemium users, there are several goals for your onboarding sequence:

- Give them their login URL and details (such as a workspace or team name, or custom URL)
- Help them discover the “Aha!” moment as quickly as possible, meaning the moment at which they see that your product has real, meaningful value
- Entice them to log back into and use the platform
- Aside from the main product value, show them additional features in order of priority ([customer research](#) can help you decide which features to showcase and in what order)

As, we’ll come to see in this post, some companies (like Slack) take a more pared down approach to freemium onboarding, and send only product behavior-based emails after the initial welcome instead of a drip sequence.

For now, here’s a freemium drip onboarding sequence from [InVision](#) that meets the above goals. In the sequence, there are four emails (not based on user behavior). Then after that, the user is added to their newsletter which directs

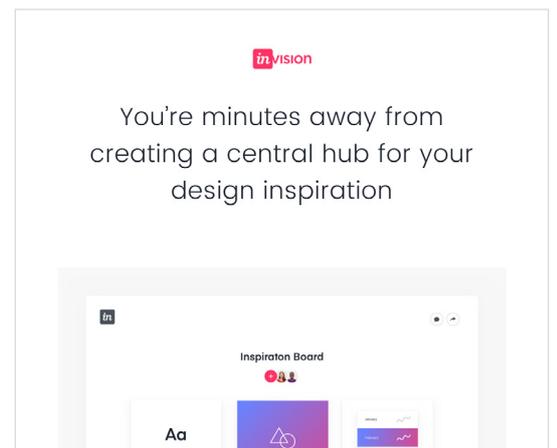
traffic to their popular design blog.

These are the four email subject lines before the user is added to the newsletter:

1. Welcome! Use Boards to showcase your creative vision
2. Get started with 3 quick videos
3. Grab 3 free design tools to get more done, faster
4. Get your insider’s look at design at Evernote, Huge, SoundCloud and more!

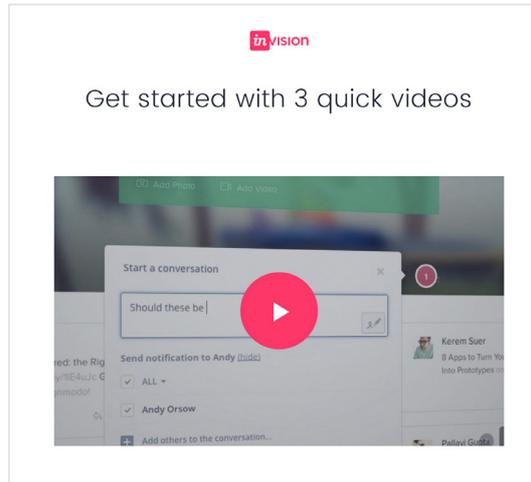
### Email 1 subject line: **Welcome! Use Boards to showcase your creative vision**

The first email in the sequence is a simple welcome email that drives traffic back into the app with a CTA button that reads “Create Boards.”



### Email 2 subject line: Get started with 3 quick videos

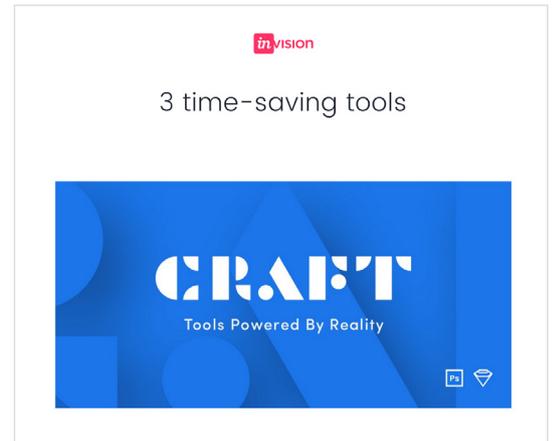
In keeping with InVision's target audience, the focus of their emails is more design heavy and is light on the copy. This email shares product videos that walk the user through the process of creating boards and prototypes.



### Email 3 subject line: Grab 3 free design tools to get more done, faster

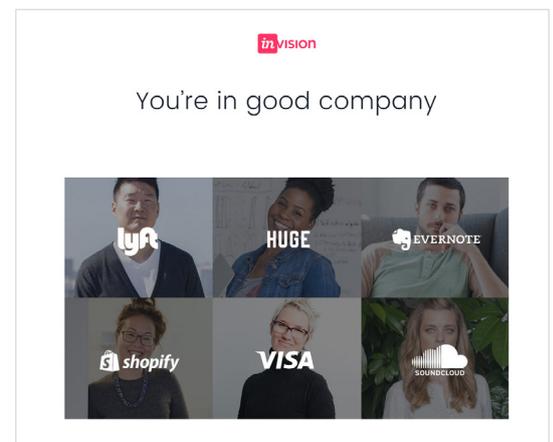
The third email introduces the new user to 3 free design tools, whether tools that are essentially side projects for InVision or found inside the app. Regardless of which one the user tries first, InVisionApp is portraying their brand as knowledgeable, helpful, and giving. This helps to establish a connection.

The takeaway here is that if you have any free tools or resources that aren't just designed for onboarding, but are primarily designed to give value to your target audience, then you should include them in your initial sequence. If readers know that there are great tips and resources in your emails, they will be more likely to read them in the future.



### Email 4 subject line: Get your insider's look at design at Evernote, Huge, SoundCloud and more!

The final email in the email onboarding sequence sends new freemium users to their blog's homepage. Truthfully, Inside Design is more like a digital magazine than a blog. This is a nice, smooth transition from the product-focused emails to what comes next: the user is added to their newsletter which shares content from Inside Design.



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## How to send email content based on user behaviour

The above example is a 4-series email onboarding sequence that isn't triggered based on user behaviour. It's a drip sequence sent out to all new users.

A drip sequence can work if there are a set number of steps users must take to get

value out of the product, or if you serve a target audience or niche.

It's very hard to create a robust drip sequence if your users stretch across every industry, or if the way to get started is incredibly simple. [Slack](#) meets both of

the above criteria, and that's why they only send action-based emails apart from the welcome email.

This is why you need strong analytics data that can help you to understand your customer's behaviour. We always recommend a data-backed approach to all of your communications and believe that it makes the most sense to have this data accessible at the creation point of drip sequences. It's why we're building GoSquared Automation.

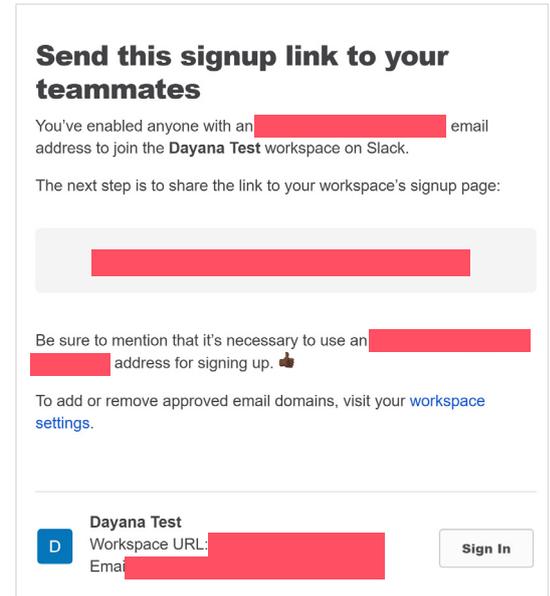
The following email from Slack is triggered when a user invites another user and enables a signup link for anyone in their organisation with the same email address.

**Action-based email subject line:  
Share your signup link**

These sorts of emails can serve as a reminder for the user. Right in their inbox,

they see that they need to share their link. It's a smart way to prompt them to onboard their team.

But what about sending emails when they haven't taken or completed an action?



## What to send when a desired action hasn't been taken



In addition to emails triggered by user behavior, you can send emails that have been triggered because an action was NOT taken.

Let's say that, like Mailerlite, your onboarding dashboard includes two steps that users need to take.



## Welcome to MailerLite!

Please complete the steps below to get your account approved.

- Complete your profile
- Verify your website domain

  
[Create Campaign](#)

  
[Add Subscribers](#)

  
[Explore Integrations](#)

## Complete your profile

### About You

<b>First Name</b> <input type="text"/>	<b>Last name</b> <input type="text"/>
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### Organization information

The following information will help us automatically build your email footers to comply with CAN-SPAM Act and international anti-spam laws.

**Company / organization name**

**Address**

<b>City</b> <input type="text"/>	<b>Country</b> <input type="text" value="United States"/>
-------------------------------------	--

If a user clicks “Complete your profile,” they are taken to a form that they need to fill out.

If the user doesn’t complete this form and/or doesn’t click “Save,” that’s a great

trigger for an email. In the email, you could share a 1-minute video of the required information as well as an exciting preview of what they’ll get to accomplish once that housekeeping task is all done.

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## Timing of onboarding emails



The InVision example of a 4-series email onboarding sequence above is sent every other day. Some companies send 3 emails a day for 3 days, and then once or twice a week for a few weeks after that. There's no single hard-and-fast answer.

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Some of this will depend on the nature of your product. With some tools, users won't get any value out of it until

they've taken the required onboarding steps, such as integrating their Google calendar or synching one of their social media accounts. In that case, you'll want to encourage them to set up their account quickly.

With other tools (especially design tools), they can ignore the onboarding for a week, and then hop in and create a design without a big setup process barring their way. The issue might not be as pressing, so you can space the sequence out a bit more.

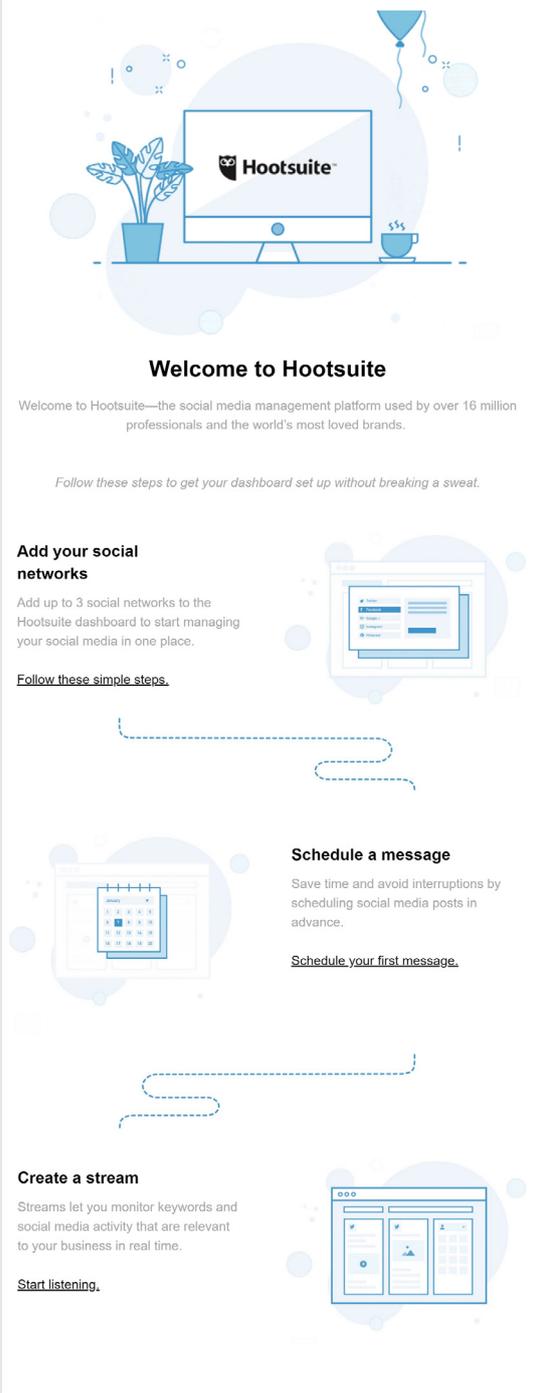
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## SaaS welcome email examples

One of the most important parts of your email onboarding sequence is the welcome email. You want to get new freemium users logging in and using your tool as soon as possible (while their reason

for signing up is still fresh in their minds).

On the following page is the SaaS welcome email example from Hootsuite.



**Welcome to Hootsuite**

Welcome to Hootsuite—the social media management platform used by over 16 million professionals and the world's most loved brands.

*Follow these steps to get your dashboard set up without breaking a sweat.*

**Add your social networks**

Add up to 3 social networks to the Hootsuite dashboard to start managing your social media in one place.

[Follow these simple steps.](#)

**Schedule a message**

Save time and avoid interruptions by scheduling social media posts in advance.

[Schedule your first message.](#)

**Create a stream**

Streams let you monitor keywords and social media activity that are relevant to your business in real time.

[Start listening.](#)

This is a great example of a welcome email and can be used as a new user email template, because it does these four things:

1. Reminds the new user what the app does (social media management platform)
2. Gives evidence of authority and social proof (used by 16 million professionals)
3. Shares the steps to get started (Connect social media profiles etc.)
4. Shares the link to the Help Center

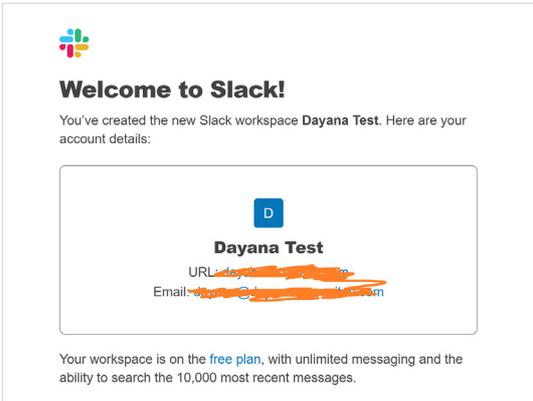
Remember that your onboarding email isn't just about sharing features. It's also a type of sales email. On-point branding with social proof can make a huge difference towards getting new users excited about setting up their account.

We all know that using a tool is a chore. You need to make it easy, and remind them why they should even bother.

**Subject line: Dayana Test on Slack: New Account Details**

In this example from Slack, we're reminded that we get "unlimited messaging." Slack isn't trying to get a new freemium user to integrate Trello or make a Slack call to a colleague. Slack just wants the new user to get to the "Aha!" moment, which is messaging.

This is an incredibly simple email which shows the user how and where to login and where to go for more information. The reason it can be so simple (and yet so effective) is because Slack is very clear on what their "Aha!" moment is.



**Welcome to Slack!**

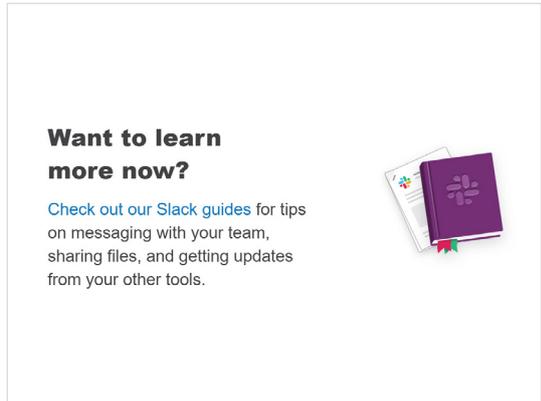
You've created the new Slack workspace **Dayana Test**. Here are your account details:

**Dayana Test**

URL: [\[redacted\]](#)

Email: [\[redacted\]](#)

Your workspace is on the [free plan](#), with unlimited messaging and the ability to search the 10,000 most recent messages.

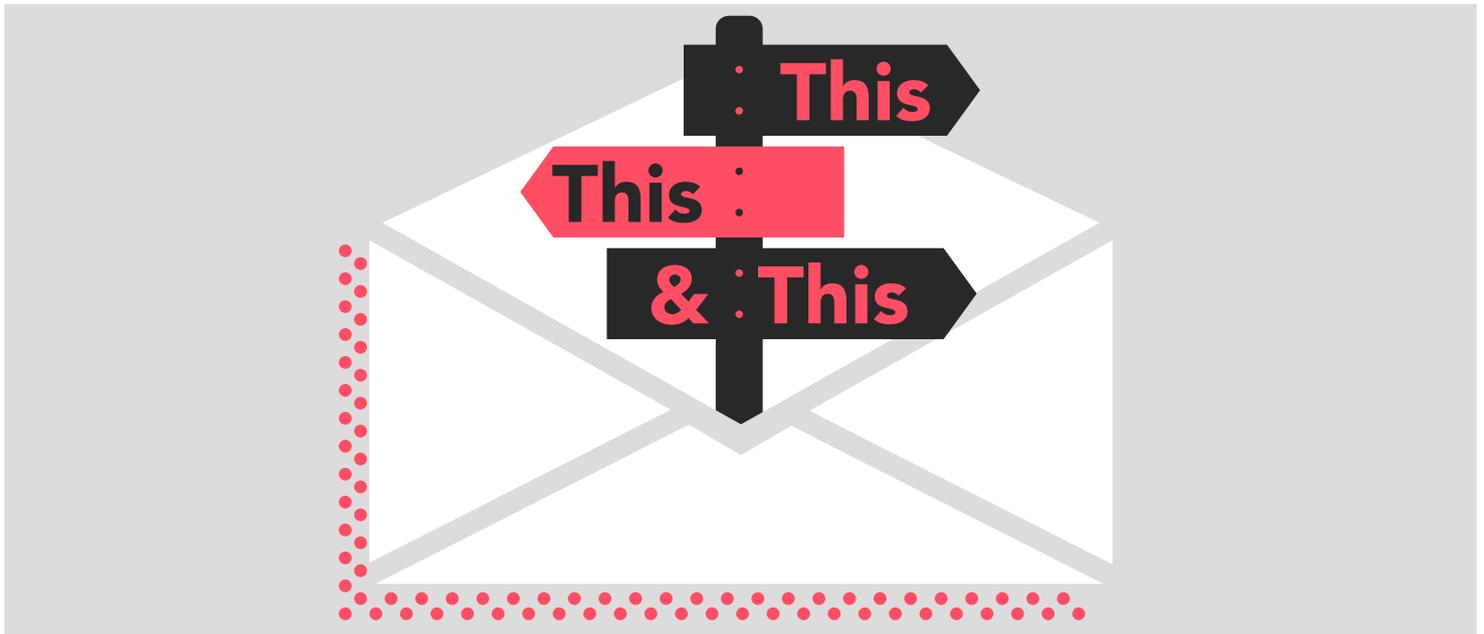


**Want to learn more now?**

[Check out our Slack guides](#) for tips on messaging with your team, sharing files, and getting updates from your other tools.



## What should you send freemium users at the end of your onboarding sequence?



Here are some things to consider when deciding what to send at the end of your onboarding sequence.

Because InVision creates content that serves designers (regardless of which tools they use), it makes sense that InVision sends freemium users a content newsletter after the initial email onboarding sequence is over.

### Subject line: Unwrite my heart



**Seriously, you need to start documenting your UX work**

Let Sarah Doody walk you through keeping track of your work—and why you should.

[HELP YOUR FUTURE SELF](#)

Most SaaS companies can't afford to treat their blog like a digital publication, though. Just because you don't have one-of-a-kind interviews like InvisionApp doesn't mean you can't direct freemium users to valuable content. If your app serves a particular audience, work on creating content that serves them and at the end of your sequence, you can segway into it.

After a period of 1–3 weeks, you should transition away from sending product-focused emails and instead send emails that add value to the reader regardless of product use. Otherwise, you'll come across as nagging and not customer-centric.

## Should you remove MQLs from your email onboarding sequence?



Should you send your email onboarding sequence to everyone who signs up? If you only serve one type of business (like small business owners), then yes, you can send it to everyone.

But if you also serve enterprises, you should check new signups for MQLs (based on industry, company size, country, etc.) and remove them from your automated sequence. Instead, your sales team will be reaching out to them directly, and their onboarding process will most likely include personal attention.

When logging in for the first time, new Hootsuite freemium users must fill out the following form before they can connect their social media apps.

If you have a sales team, you'll want to perfect this handoff.

### Welcome to Hootsuite, Dayana Mayfield!

Let's personalize your Hootsuite experience

Company name\*

Industry\*

Company size\*

Phone number

All Done!

## So, that's it!

An email onboarding sequence can help you turn your new freemium signups into active users, and active users are more likely to need premium features in your paid plans.

We hope you learnt a lot from this post. If you're still deciding whether a free-trial or freemium model is right for you check

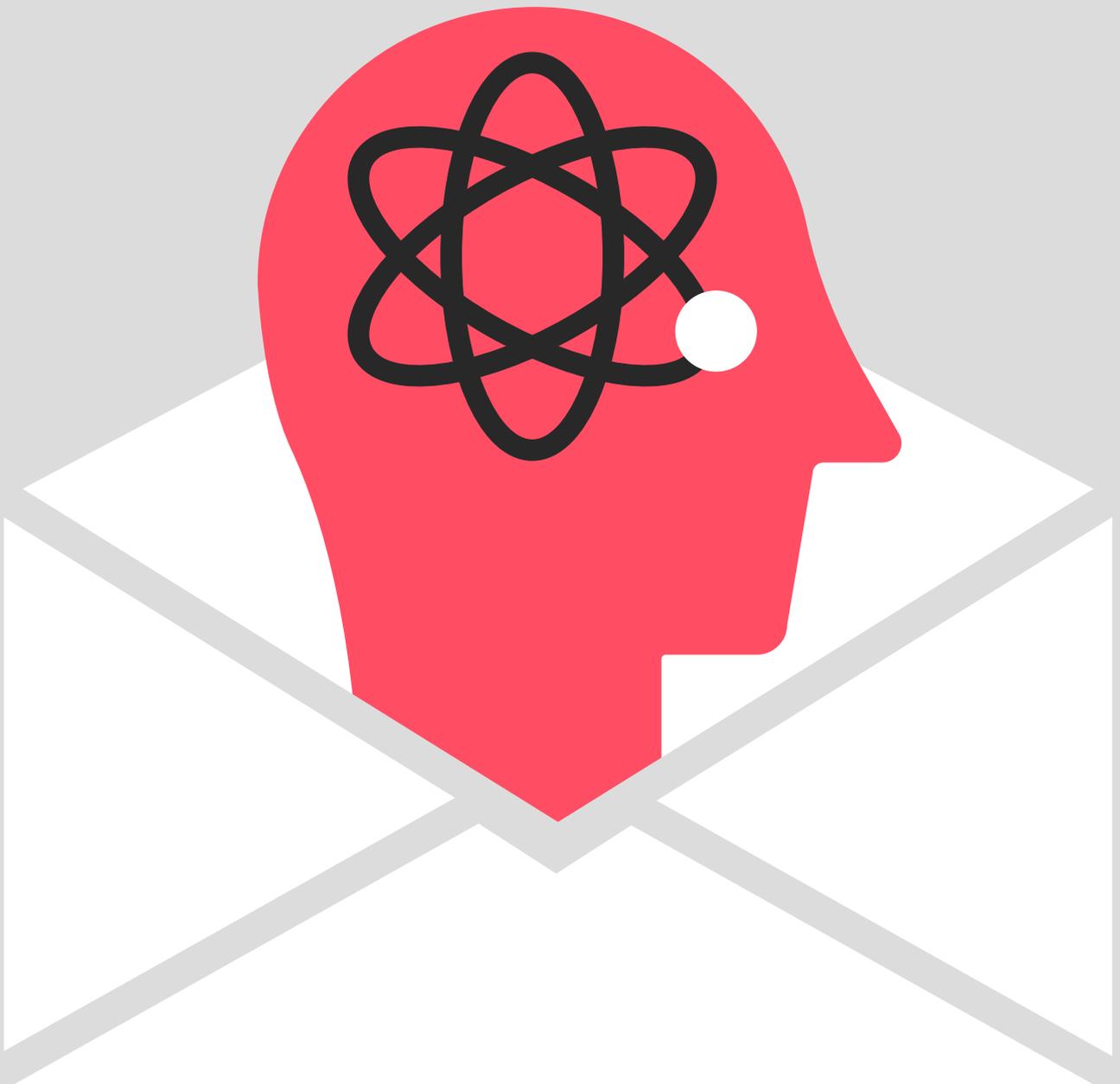
out this post on [email onboarding for free-trial users](#) and see if that helps your decision along.

We'd love to share more about our own [data-backed automation product](#), get in touch if you'd like a free consultation and early access!



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# 7 SaaS welcome email examples to inspire you





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# Learn how to get people excited about onboarding to your product to increase free trial conversions and reduce churn

Looking for SaaS welcome email examples? We've signed up for different products to save you time in your quest to learn what the top SaaS companies are doing.

Each of these emails offers a different lesson in drumming up excitement for your product and prompting users to onboard successfully.

While they all have something unique to learn from, the best SaaS onboarding emails have a few things in common too:

- They remind users why they signed up and what they can achieve with the product.
- They offer clear next steps detailing how to get started.
- They show new users where to turn for help.

Take a look at these examples and read our analysis to help you choose which strategies to apply to your own welcome email.

## 1. SurveyMonkey: Bold value proposition and clear next action

SurveyMonkey is smart. They know that people get a million emails a day. They've avoided the common, "Welcome to X" by

disrupting the reader with a clear question: "Ready to get answers to your questions?"

Ready to get answers to your questions?

Hey Dayana, thanks for creating a SurveyMonkey account. We can't wait to help you get insights and feedback from the people who matter to you. Create a survey today or use the pre-written templates in your account.

[Start now](#)

**Get feedback from anyone:**

<b>Customers</b> Build a stronger business with feedback from your customers.	<b>Employees</b> See how surveys can help you build a better, happier workplace.	<b>Consumers</b> Tap into what your target market is thinking at any time.
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[See all templates](#)  
Your username: dayanatest

This email header achieves several things:

- Caters to the user, not focused on the company name
- Reminds the user what they can do with the product
- Shows off the brand voice of the company

Below the email header, the SurveyMonkey's welcome email then lets the user know of three common use cases for the product, which is getting feedback

from customers, employees, or consumers.

Most SaaS welcome email examples include a CTA of "get started" but that's pretty generic. That doesn't tell the user what to do next. SurveyMonkey makes the user's next action very clear by guiding them to choose one of these 3 common templates or to see more templates.

Try to go beyond "get started" or "login" and show your new user exactly what they should do next, in as clear and simple language as possible.

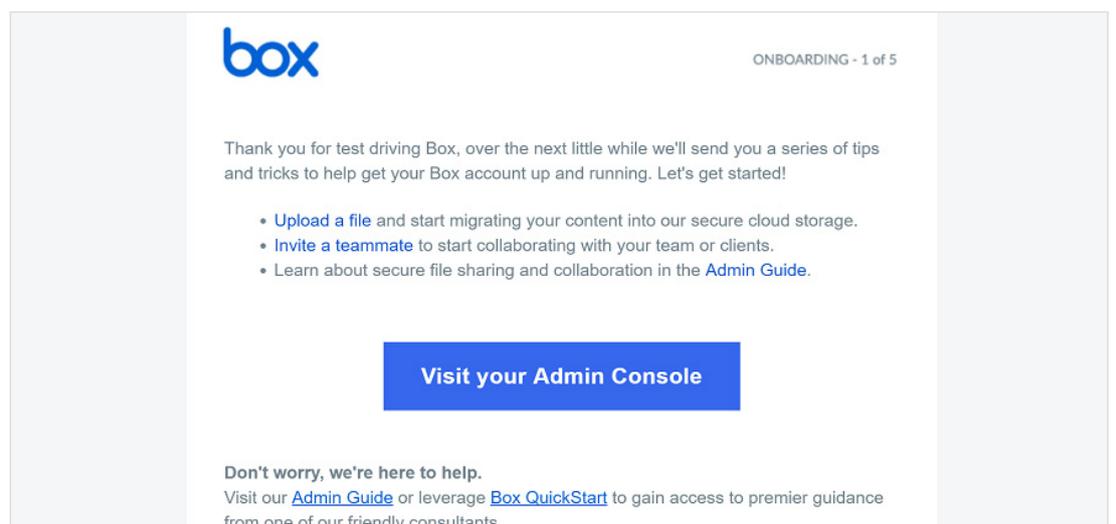
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## 2.Box: Drive users to the admin area



When getting set up with file-sharing and digital asset management system [Box](#), one of the most critical steps is adding

additional users. It may seem that this welcome email leaves a lot to be desired. Isn't it too simple? Isn't it too boring?



Maybe, but when you consider that Box is used by 70% of the world's Fortune 500s and that onboarding into a new digital asset management system is a multi-step, multi-user process, it makes sense that Box's chief aim is to get the new account owner headed straight to the admin console to add new users and configure security settings. Without those things achieved first, uploading files doesn't hold as much value.

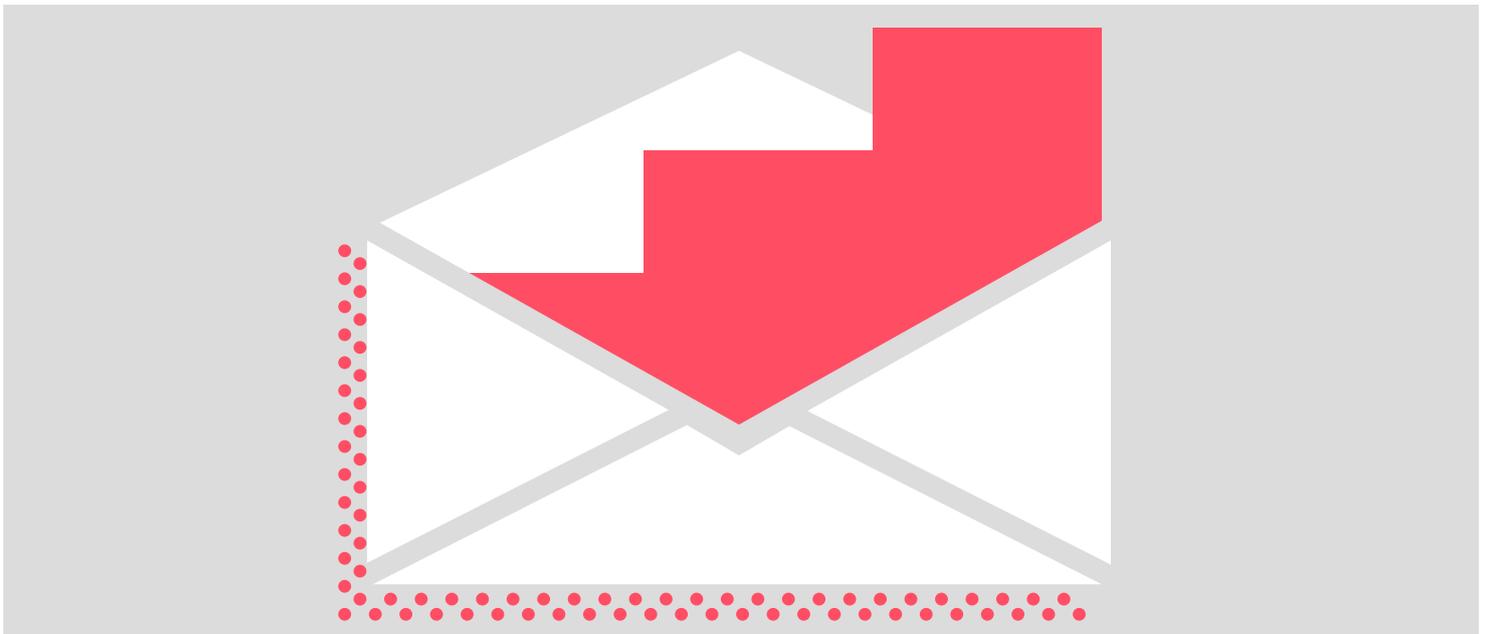
Even though it's done in a simple way, the coloured hyperlinking makes it really

easy for a user to see the different next steps:

- Upload a file
- Invite a teammate
- Visit the admin guide

If there isn't a single next step that makes sense for your users to take, and you need to present multiple options, make sure that you make these options easy to read and understand. If you can list the options in a logical order, that's even better.

### 3. Eventbrite: Simple steps



Eventbrite's welcome email is really simple. Eventbrite is not a B2B tool that is used by only a certain company role type. It's not even necessarily B2B. Eventbrite can be used by teachers, church pastors, community centres, and hobbyists as well as businesses.

If you're looking for a super simple, friendly onboarding email template, then copy Eventbrite and hit upon these three elements in this order:

- Brief, friendly welcome
- A short overview of 3 step process
- Where to turn for help

If your product is B2C, this is a great welcome email example for you to copy.

**Welcome to Eventbrite!**

Eventbrite is the easiest way to sell tickets and manage registration for any kind of event, and it's totally free for free events.

[Create an Event](#)

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**How it works**

 <b>Create</b> Fill in event details and ticket options, and your page is ready!	 <b>Share</b> Send invites and promote your event with social tools.	 <b>Host</b> Stay on top of your guest list and tickets, and have a great event.
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**Need more help getting started?**

Check out our [Help Center](#) for step-by-step tutorials or view your support options [here](#).

Cheers,

## 4. Shopify: Tailored to the customer type



When signing up for a free trial of Shopify, new users are asked a couple of simple questions:

- Why you're creating a store
- What is your annual revenue

This allows the Shopify team to immediately segment their new leads. While the initial welcome email is the same regardless of how I respond (trust me, I tested it), of course we assume that subsequent emails will be tailored based on my responses. The sales team will undoubtedly follow up with new free trial users who report a high annual revenue.

Segmentation and further lead follow up aside, let's break down their initial email into an onboarding email template.

The header helps to contextualize the product. People don't want software that looks like it exists for its own sake. This header clearly showcases why you should be excited about your free trial: the ability to sell products on your own domain.

Then I'm given the details of my new account and my store name. Then I'm treated to a free resource: a logo maker. By showcasing their company as helpful, Shopify utilizes the psychological marketing hack of reciprocity.

The screenshot shows a welcome email from Shopify. At the top left is the Shopify logo, and at the top right is a "Log in" button. Below the header is a hero image of a modern interior with a search bar containing "https:// www.yourdomain.com". The main body of the email starts with "Welcome to Shopify , Dayana!" followed by "Your free trial starts today." and a congratulatory message. Below this is the "Your account details:" section, which lists the URL "dayana-test.myshopify.com" and the login "dayana-test.myshopify.com/admin". The next section is a logo maker tool, showing a placeholder for "your business name" and a "Design a logo" button. At the bottom, there is a testimonial quote: "I'll never forget our first Shopify sale... we were open for business right there, it was amazing." followed by the "UNBOUND MERCHANTS" logo and the name "Dan, Unbound Merino".

So the welcome email template for a new customer or trial user is:

- Contextualized header
- Friendly welcome
- Account details

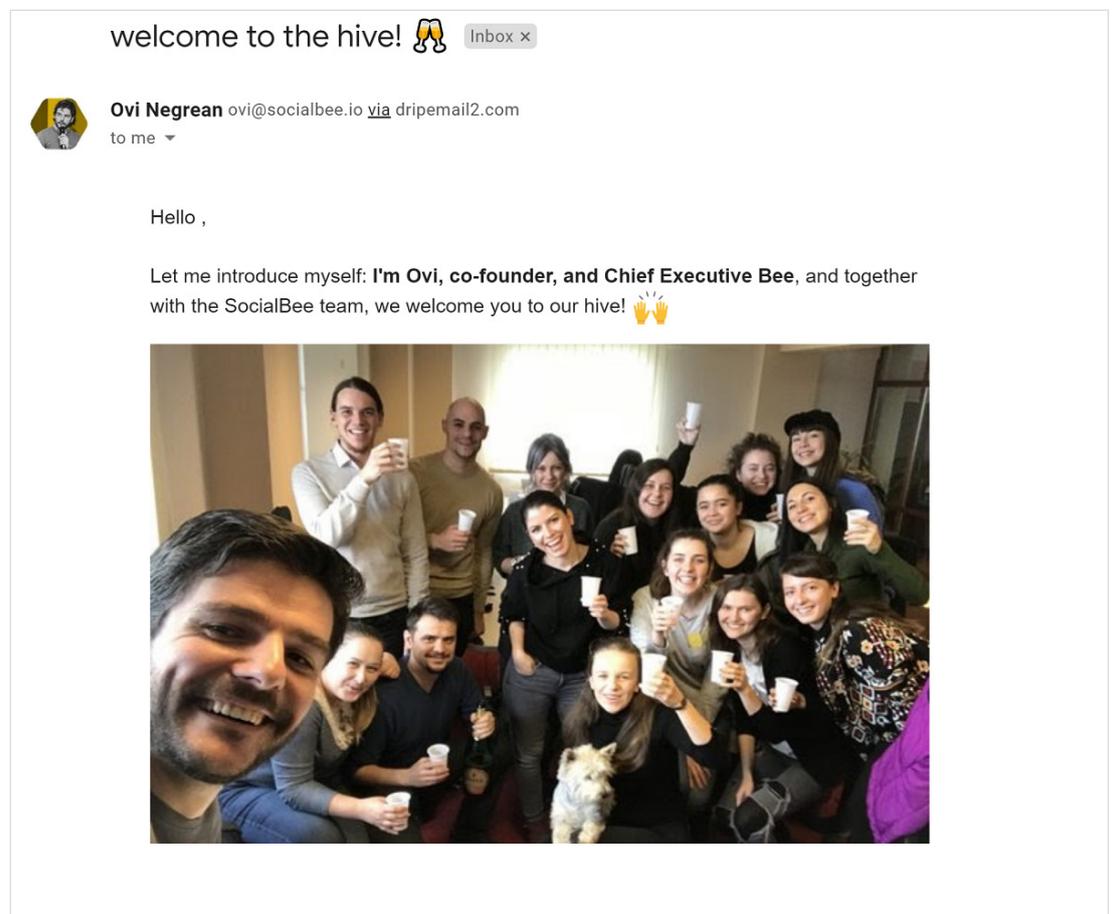
- Free resource
- Testimonial
- Resource links

This is a template that any SaaS company can test out.

## 5. SocialBee: Humanizing your welcome email

SocialBee is a small team ready to take the social media scheduling world by storm. They don't want an overly enterprise looking brand like Hootsuite or Sprout Social. They want to show who they truly

are: a small, passionate team. If your target audience is small business owners, showing them a picture of your actual team can help them connect to you and relate to you.



But that's not all we can learn from this onboarding welcome email. The SocialBee email also connects to the target customers pain points with phrases like "running a business is hard" and "you need more business and more time for your business."

They also include a promised outcome

that the product will provide: "More leads with less effort."

And they make these pain points and promises easy to read for skimmers by using bold font in their email.

As is best practice, they drive readers back to the app with a large CTA.

## 6. Xero: Include a “buy now” option

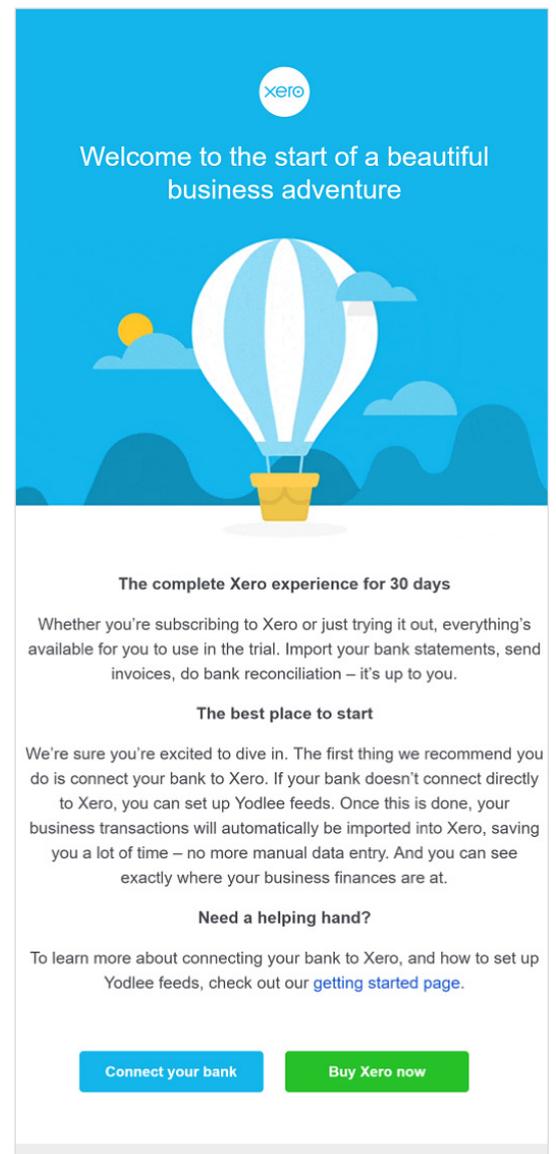


For Xero, some free trial users are sceptical. But others are already convinced by a referral or marketing asset. On Xero’s pricing page, prospects are given the option to either buy now or to try Xero for free. When you sign up for a new trial with Xero, you’re taken straight to the onboarding dashboard that tells you what to do to get started.

After seeing this and later checking their email, users are again given the option to purchase the product—right there in the welcome email.

People get locked into it once they get everything set up. You have to hook up your bank, invite your accountant, and import the financial transactions from the current fiscal year. It’s a big task. It makes a lot of sense that some free trial users will be ready to just take the plunge and purchase the product right away. They want to get the decision of which app to use out of the way, and they just want to commit and get on with it already.

Aside from guiding free trial users to purchase in the initial welcome email, there’s something else to learn from this Xero email. Xero tells people how long their trial is. If you don’t offer a free version, but only a free trial, make sure you remind people how long they have to try it out.

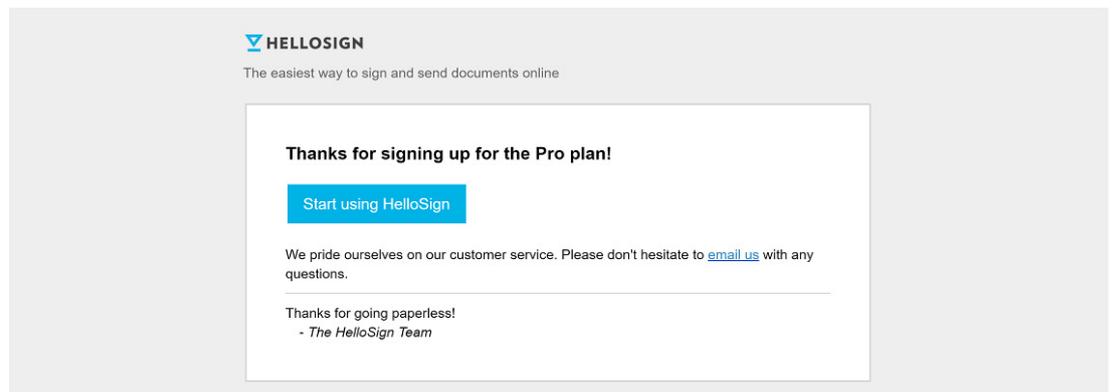


## 7. HelloSign: Quick congratulations and offer for support



Speaking of “buying now,” what does a welcome email look like if a user just goes ahead and purchases the product instead of opting for a free trial? If that product is fairly simple and straightforward to use,

then you don’t even need to share next steps and next actions. If your product does one main function (get documents signed legally), then you can keep your email sparse.

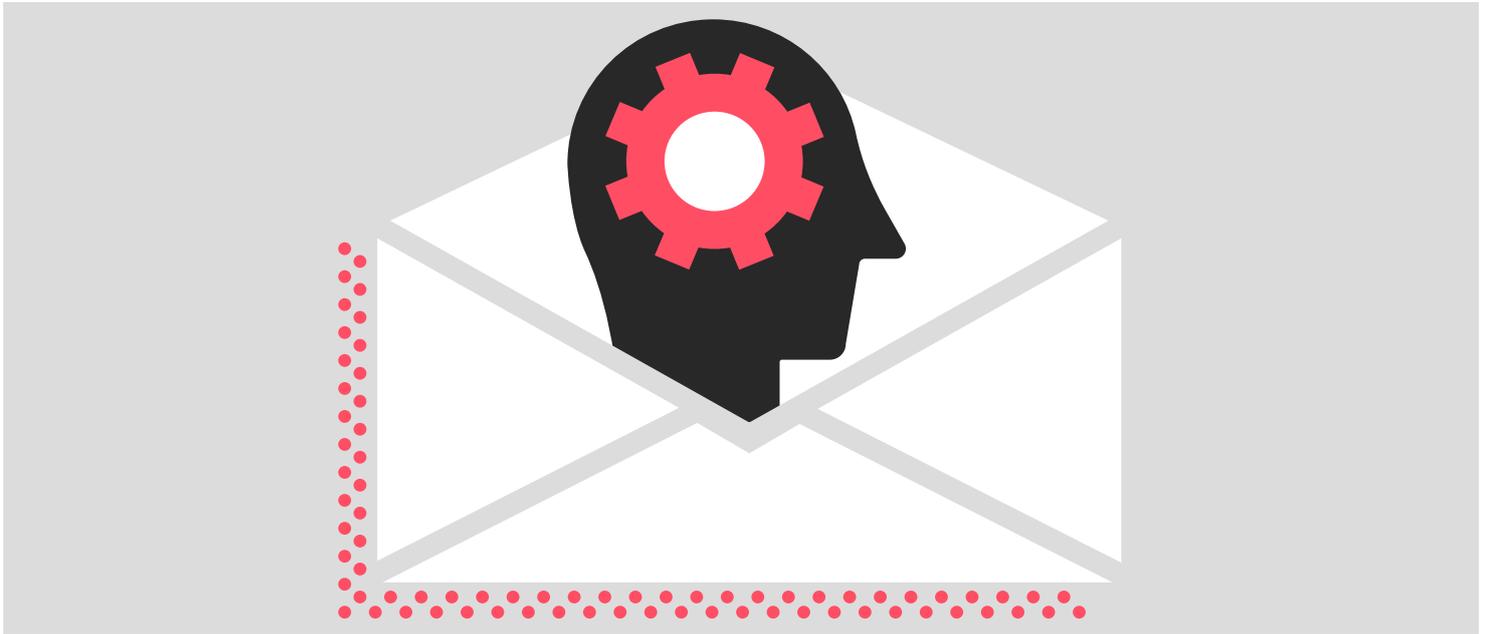


HelloSign can use the phrase “Start using HelloSign” because there is no complex onboarding. Once a user clicks that button, there’s only one thing left to do, and that’s add to a document. The reason more complex products need to avoid CTAs like “start using” or “get started” is because they need to help users know

what action to take first.

In addition to simple CTA that guides users to the product, HelloSign also offers support via email and includes some cute copy to congratulate new users on going paperless. Don’t underestimate the power of branded microcopy in getting users to fall in love with you.

## Takeaways from these SaaS welcome email examples



There are so many things to learn from those welcome emails! Of everything we discussed, here are the top takeaways you should consider applying to your first onboarding email:

- Include a CTA in your SaaS welcome email that drives new users back to the product
- Connect with customers emotionally by hitting on common pain points or humanizing your email content
- Include a link to your best quick start guide or video, or links to your help centre and resource center
- Use plain text or a designed email

based on your target audience and what you want to communicate about your brand

- Remind users how long the free trial is
- Guide users to a specific area of the product or a specific action (a concrete step, not just “get started”) if your onboarding is more complex
- Offer a “buy now” option if onboarding to your product is so time-consuming that committing to the purchase would help users follow through

GoSquared is adding smart email features soon! [Sign up for early access.](#)

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