

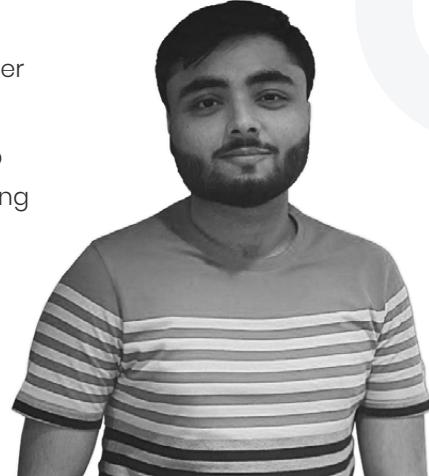
How collecting in-app feedback improves Factors.AI's product



Integrating an in-app feedback widget with our Slack channel enables us to swiftly address user issues on our platform and gather important feedback for future product development.

Additionally, product improvements are measured through in-app surveys and tracked over time for comparison. Consistently applying this approach across multiple surveys and with hundreds of users has enabled us to boost our net NPS score by 40%.

Sarthak Sarin
Product Manager,  factors.ai



40% increase in the survey's NPS score



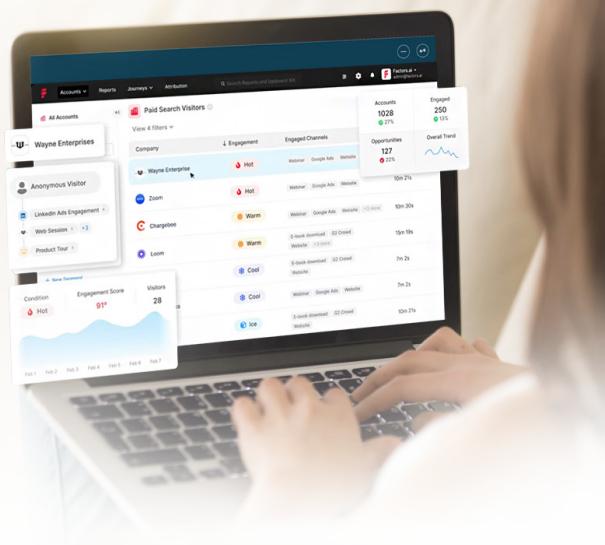
Challenges

- Product adoption
- Collecting and processing user feedback

Solution No. 1

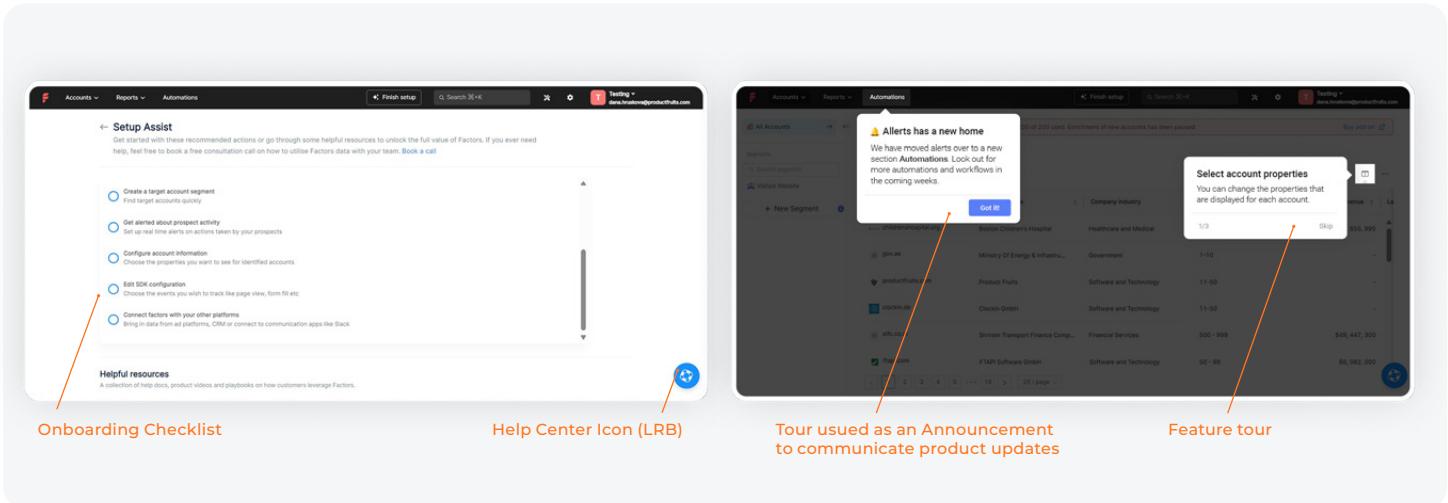
Acceleration of product adoption

Factors.AI implemented Product Fruits onboarding elements to speed up user onboarding and key feature adoption. They offer new users contextual navigation through its platform, using an Embedded Checklist, Feature Tours, Hints, Announcements, and a Help Center element. Boosting the activation rate and ensuring new users engage with the product's key features during the first seven days is an essential task for the Factors.AI product team.

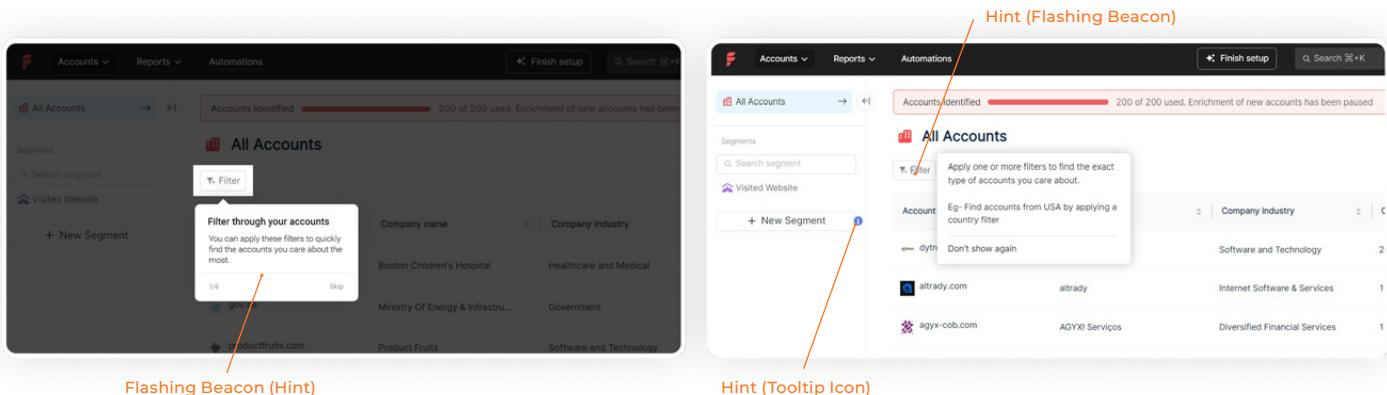


How it works:

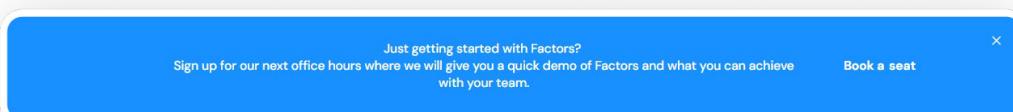
 **The Checklist (Embedded)**, complemented by  **Feature Tours** and links to resources, is seamlessly integrated into the Factors.AI platform. This setup allows new users to quickly familiarize themselves with necessary installation steps and key product features for fast adoption. The Checklist is prominently displayed within the platform in two ways: as a standalone element, and accessible through a specific button "Finish Setup".



 **Hints**, including flashing beacons and [please specify or remove placeholder] types, provide ongoing, contextual assistance in the form of descriptions or launchers of feature tours for key features. This is particularly useful when users seek an onboarding refresher after dismissing or completing the Checklist.



 **In-app Announcements** serve as an element to promote and expedite the onboarding process, inviting new users to participate in free online training sessions.



 **The Life Ring Button** serves as a central access point for user help and chat, it offers users:

- A Knowledge Base – containing all essential resources and product documentation.
- A Communication Channel – Intercom chat, primarily used for addressing contextual navigation issues and providing real-time support, serves particularly to users who prefer to communicate with a real person.
- A Feedback Channel – The feedback widget is employed more passively to collect non-urgent feedback, report bugs, or submit tickets concerning product or onboarding issues.



Help Center (Life Ring Button) with integrated Feedback widget ("Raise an issue" button) and Chat (Intercom)

Solution No. 2

Product and onboarding improvement through in-app feedback

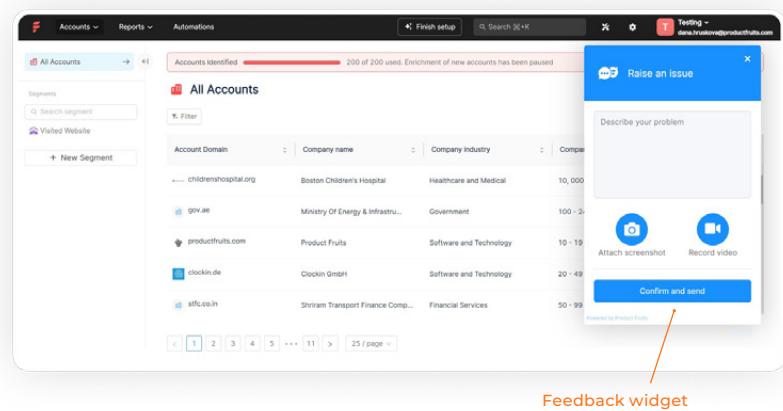
By integrating the Feedback widget with a Slack channel and launching in-app Surveys, the product team managed to regularly collect and work with valuable feedback on both the product and the onboarding process. This process allows the product team to constantly optimize user onboarding flows and map product design to a customer-centric platform.



How it works:

Feedback elements (Feedback widget and Surveys) within the platform serve various purposes across different stages of the user journey.

Feedback widget, integrated into the Help Center (Life Ring Button element) and linked with the Slack channel, is primarily used to gather user onboarding and product-related feedback. This setup aims to reduce the volume of tickets received via live chat (Intercom) by enabling the product team to swiftly identify and address onboarding issues.



Surveys (CSAT and NPS) offer the Product team valuable insights, such as:

- Measurement of the Factors.AI platform's improvement over time. For instance, by comparing NPS scores from August to December to gauge the quarter's enhancements.
- Evaluation of the onboarding process's impact and identification of its weaknesses.
- An understanding of reasons behind user churn and facilitates targeted interventions with an individualized approach.

Power tips from Sarthak 🔥

We run surveys (NPS, CSAT) every three months for all users who have signed up at least 30 days before the survey date. This gives us a mix of old and new users to gather feedback from. Old users can help us validate whether our improvements based on the last survey were successful, while new users provide a fresh perspective on product usage and pain points.

In the NPS survey, we have also set up rules to gather more details about users' experiences. Users who rate 7 or less on the NPS survey are presented with an additional question asking why they feel this way and what we could change in the product **today** to better suit their needs. Since it is timely (right after their rating), they usually provide direct and useful feedback. Sometimes, we reach out to the user via email to ask more questions about their experience. We use this valuable feedback to prioritize product improvements and even generate new feature ideas.¹

Sarthak Sarin

Product Manager, Factors.AI



How likely are you to recommend Factors.ai to a colleague or friend?

0 1 2 3 4 5 6 7 8 9 10

Not at all likely to recommend Extremely likely to recommend

NPS Survey (initial and final cards)

Thanks for adding your feedback 😊
It helps us greatly in improving the product for you.

In case of any issues, feel free to reach out using the help button on the right.

Close

Thanks for your honesty. What do we need to improve for you TODAY to have a good experience?

Enter text here

Submit

CSAT Survey (additional question for those who rate platform usage 7 and less)

About factors.ai

Factors.AI is an account intelligence, analytics & attribution platform that helps you build your sales pipeline by tapping into intent signals on your website, CRM, LinkedIn, & G2. Score & prioritize high-intent accounts engaging across multiple channels. Automate prospecting & get in touch with in-market buyers before your competitors. Factors.ai is trusted by Go-To-Market teams at high-growth B2Bs like Chargebee, Traceable, Clevertap, WebEngage and more.

Find out more at <https://www.factors.ai/>