

## A brief note to you

Thanks for listening to the AppCues podcast I did with Ramli John. Below are:

1. How you can improve YOUR trial to paid conversion for your B2B SaaS
2. The bullet-point notes from the conversation

And, if you're looking to improve Trial to Paid conversion at your B2B SaaS, I can help – [see how here](#).

Cheers,

Kareem Mayan  
[www.trialtopaid.com](http://www.trialtopaid.com)

## How to improve your Trial to Paid Conversion

There's three steps to improve your conversion.

1. You need to understand who your trials are
2. You need to understand what their desired outcome is when they sign up for your SaaS
3. You need to understand how to give them that outcome as quickly as possible

Simple, but not easy. But no worries - read on for a pragmatic approach to make it simpler.

### 1. How to Understand Who Your Trials Are

Ask them. At [Savio](#) (and my two previous high-velocity SaaS companies) we asked people on the [signup form](#):

**Savio**

First Name Last Name

Company

Work Email Address

Create password

8 chars min. No variation of your name or email. No common passwords.

What team are you on?

- Support
- Product
- Sales
- Customer Success
- Marketing
- Other

Create your account

Already have an account? [Login Here](#)

When you do this your dev team can run a query or pipe this information to your BI tool. This is the starting point for you to understand the different customer types that sign up and the jobs they're trying to do.

We also send customers an email when they sign up that we get a 20-25% response rate to which gives us more insight:

Hi kareem,

(I hate automated emails too, but replies to these are literally my favorite emails to get. Even better than the forwards from my mom 😊)

Saw you signed up for Savio - I'm a co-founder and personally greet and help everybody who signs up.

Can you do me a favour? It would really help our two-person startup if you hit "reply" and answer one question:

Why did you sign up for Savio?

I'm asking because knowing why you signed up helps us deliver on what you want.

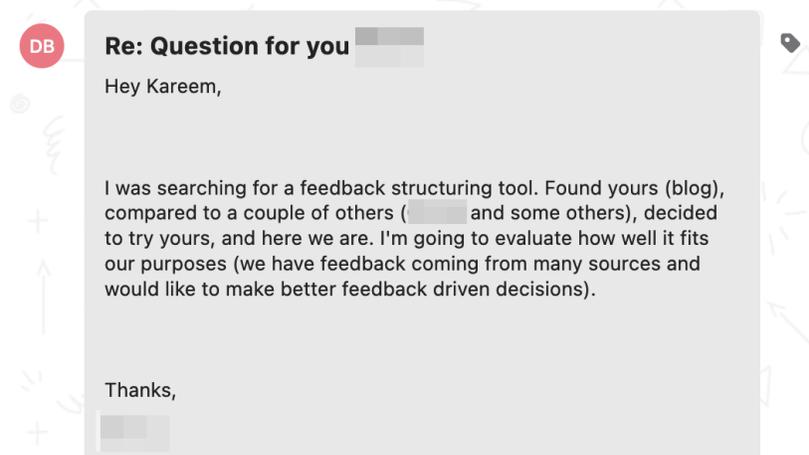
Just hit reply and let me know.

Thanks kareem,

Kareem

PS> If Savio's not a fit for you, it would be helpful to understand why not. Please be brutally honest, my feelings won't be hurt!

You'll get responses, like this:



These give you more color and context about:

- the current state of peoples' worlds (above - feedback coming from different places and not making feedback-driven decisions)
- why they sign up (to centralize feedback and make feedback-driven decisions)

- and sometimes even more (they found us via the blog, who they compared us to, and even how they were looking for a “feedback structuring tool” which is a term I’d not heard or used in four years of running Savio, which is useful for marketing purposes)

You’re ultimately going to want to figure out who you’re attracting:

- How big are your trials’ company/team?
- How much revenue do they have (approximately)
- What tools do they use?
- What’s their role?

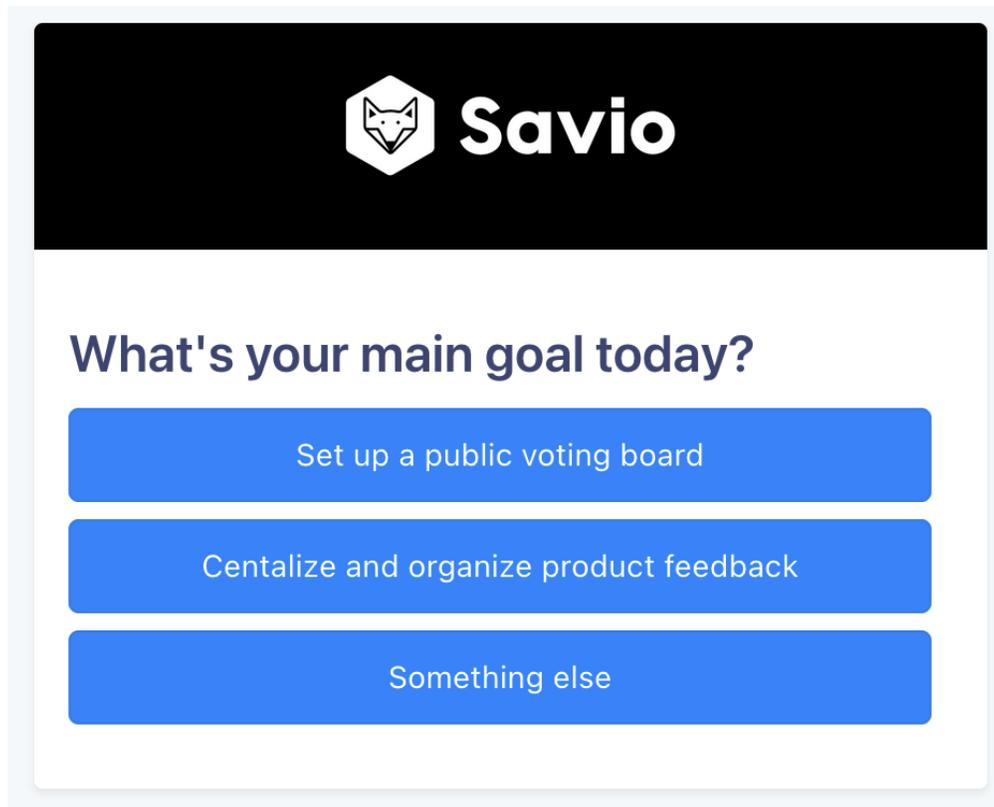
This information helps you improve both how you structure your onboarding, and your website positioning (to attract more of the “right” kind of trials for your SaaS).

## 2. How to Understand Trialers’ Desired Outcome

When someone signs up to use your SaaS, they’re dissatisfied with the state of their world. Something’s wrong, and your SaaS is promising to fix it.

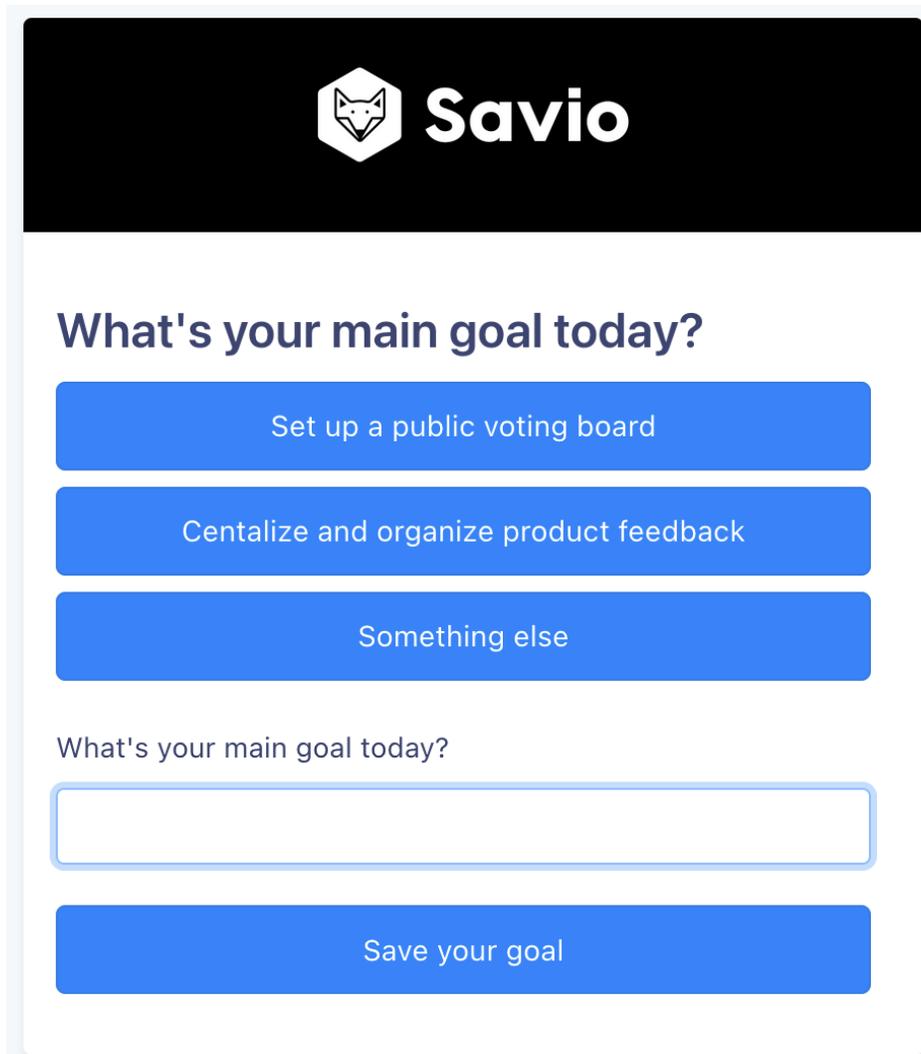
To fix it (or show them a hint that you can fix it), you need to understand what their problem is, and what their desired outcome is of using your SaaS.

To understand a Trial’s desired outcome, you should ask. This is the first screen Trials see when they fill out the registration form at Savio:



The image shows a registration form for Savio. At the top, there is a black header with the Savio logo (a white fox head inside a hexagon) and the word "Savio" in white. Below the header, the question "What's your main goal today?" is displayed in a bold, dark blue font. Underneath the question are three blue buttons with white text, stacked vertically. The buttons contain the following text: "Set up a public voting board", "Centralize and organize product feedback", and "Something else".

We've distilled Trials' desired outcomes down to the first two options based on customer feedback. They are the most common by far, but we've left in "Something Else" which opens an input box for freetext input in case the first two options don't appear to the Trial:



The screenshot shows a mobile interface for Savio. At the top is a black header with the Savio logo (a white fox head in a hexagon) and the word "Savio" in white. Below the header, the question "What's your main goal today?" is displayed in a dark blue font. Three blue buttons with white text are stacked vertically: "Set up a public voting board", "Centralize and organize product feedback", and "Something else". Below these buttons, the same question "What's your main goal today?" is repeated in a smaller, grey font, followed by a white text input field with a light blue border. At the bottom of the form is a large blue button with white text that says "Save your goal".

If you're just starting out you can skip the buttons and just include an input.

Tallying up this information gives you a better idea of what success looks like to your Trial.

And once you get enough data you can send Trials down a different onboarding path depending on their Desired Outcome. I would start with just asking, though, and building different onboarding flows once you're confident you know what success looks like for 80-90% of your Trials.

### 3. How to Give Trails their Desired Outcome

This is the trickiest bit, because it takes taste, good judgment, and the ability to make smart tradeoffs. But you can de-risk the onboarding experiments to run with data.

The approach I use to get data is:

1. Watch screen recording sessions
2. Do a cohort analysis on product usage data to see what successful customers do vs. unsuccessful ones

Tools like Full Story, Smartlook, or Contentsquare let you watch your users' sessions. If you watch 100 trials use your SaaS you'll get a pretty good idea of what they're trying to do in your app. You'll also understand how painful it is for them.

You'll want to square that information by looking at what converted trials have done in the first 30 days after converting vs. unconverted trials. If you don't have that data, that's fine - looking at what paying customers do vs. churned will give you a good idea of the regular actions customers need to take in your app to get to their desired outcome. I cover [how to do a cohort analysis on product usage here](#).

Once you get your qualitative and quantitative data, you need to put on your product management + UX hat to decide how to change your onboarding flow so Trials get to their desired outcome soon after signup.

Some key tactics I use to support the in-app onboarding flow are:

- A checklist that shows trials progress and guides them on what to do next
- In-app "signposts" that orients and set expectations for how long the process is
- Drip emails to help trials get to the next onboarding step
- Including persistent and prominent links to our knowledge base or to book an onboarding call

If you're looking to learn more about improving your trial to paid conversion or want to learn more about how I can help you, visit [www.TrialToPaid.com](http://www.TrialToPaid.com).

# Bullet Point Summary of my conversation with Ramli John

## 1. Why is improving trial-to-paid conversion rate so important?

- It's one of 5 major levers to grow a saas business

## 2. What's a good trial-to-paid conversion rate?

- Totally depends on the business.
- I've run a business that asked for card up front and had 85% conversion
- No card up front: 25% is usually achievable for most product-led SaaS companies. I've seen 40% in exceptional cases with a killer product.

## 3. What are common reasons for low trial-to-paid conversion rate?

- The trialer has a goal. your marketing site has sold them the dream. if your app doesn't deliver on that promise, trials will be less likely to convert.
- The main reason trials don't convert: your app doesn't deliver the desired outcome for your trials. Possible reasons?
  - Your marketing site sets the wrong expectations
  - You don't understand what the customer's desired outcome is
  - You understand what the Desired Outcome is but your app doesn't deliver it
  - Your app delivers it but there's too much friction and it's not clear to trials why they should take the steps outlined in onboarding

## 4 You have a three-step framework to improve trial-to-paid conversion. The first step is to identify your customer segments and their needs. Why is that important?

- your customer has a pain that your app is promising to alleviate
- most apps have different sets of customers with slightly different pains and a desired outcome
- if you don't understand each segment, their pains, and their outcome, you can't get trials to their Desired Outcome

## 5. What do most get wrong with improving their trial-to-paid conversion rate?

- Some main reasons:
  - they make assumptions about their trial's desired outcomes
  - there's too much friction in onboarding
  - they use tools to paper over bad UX
  - they think onboarding is about drip emails - not the in-app experience

## 6. How do you validate a product's Aha moment?

- I take two cohorts of users - unconverted and converted - and look at product usage differences between the two.
- That shows me what converted trials do that unconverted didn't?
- This gives me key product usage differences that - when paired with the qualitative understanding of your customers - helps you understand what the "Aha" moment is.

- You can feed those learnings back into your onboarding so new trials do the things that converted trials do.
- This also decreases churn. [I wrote an article about how we used this process to reduce churn by 87.5% at a past business here.](#)

## **7. What's some best practices when improving the UX for bumping up trial-to-paid conversion rate?**

- There's no quick fix! Onboarding should be treated like a feature that's iterated on. At my current business Savio we've iterated on our onboarding flow 5x over 3 years.
- But! If someone comes to me and says their TTP isn't where they want my first two go-tos are:
  - Are you asking trials why they signed up?
  - Are you asking converted trials why they chose to pay you instead of another?
- This info will help you piece together the three most important things to improve your onboarding and TTP:
  - What your customer segments are
  - What their desired outcome is
  - How you can change your UX to give them their outcome