



**Velocity  
Growth**

## Module 6: Activation

# Overview of activation

---

# What is activation?

Activation is driving users to take the intended action you wish them to take.

Activation is not passive, it's active - there are one or more goal associated with it.

Activation is a broad focus area

## Encapsulating

- PLG
- Onboarding
- Upselling
- Email campaigns
- Drip campaigns
- Triggers & Hooks
- And more



# Remember EPAG?

Most acquisition will have an end point acquisition goal, or EPAG. It's the last step in the acquisition process.

In activation, we start with EPAG and move users through the rest of the customer journey.

# Stages of Activation

EPAG becomes your first step in the activation loop. There are two other components to consider:

1. Next Step Activation
2. End Goal Activation

# Next Step Activation

The primary goal of next step activation is to drive people to the next step in your user or buyer journey.

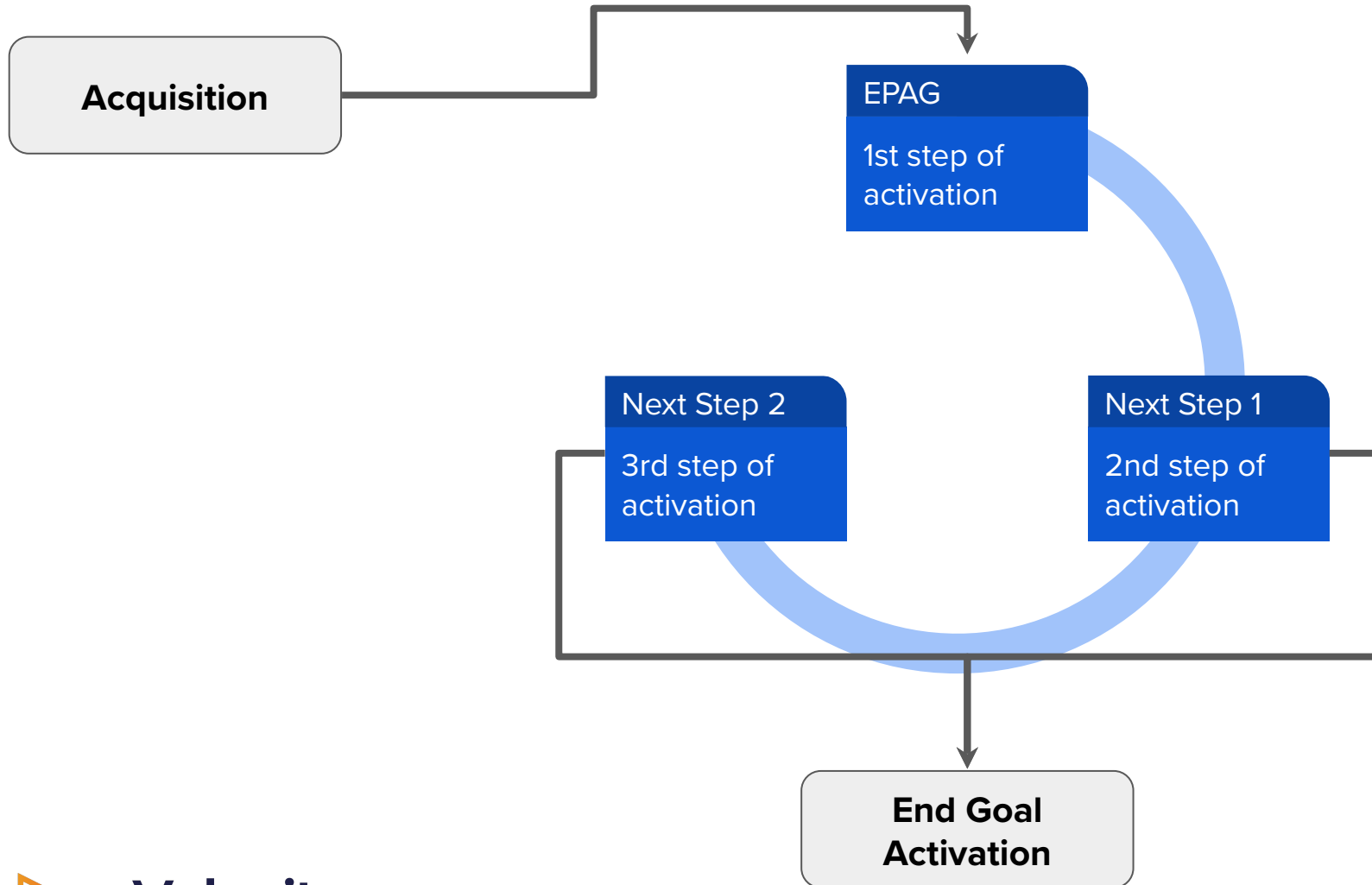
There likely are **multiple** next step activation steps.

# End Goal Activation

The primary goal of end goal activation is to assist in getting people to your “end” customer journey state.

It’s probably a revenue based goal.

# Activation loop



## Components of great activation

1. Focus on the metrics that matter and have a well defined process
1. Relentlessly focus on each step of the activation flow
1. Be intentional & have a point of view on your user journey
1. Leverage user psychology to create triggers that work
1. Be everywhere your customers are

## Common causes of poor activation

- Lack of measurement around goals
- Not being proactive with the user
- Not enough of a push through the buyer journey
- Lack of experimentation
- Rigid process that doesn't change
- Laziness when things “are working”

# Growth 101 focus

1. **Focus on the metrics that matter and have a well defined process**

## **Mastering Growth covers:**

1. Relentlessly focus on each step of the activation flow
1. Be intentional & have a point of view on your user journey
1. Leverage user psychology to create triggers that work
1. Be everywhere your customers are



Focus on the metrics that matter and have a well defined process

---

# End to end example: Miro

miro

[Product](#) ↓ [Use Cases](#) ↓ [Resources](#) ↓ [Pricing](#) [Enterprise](#) [Contact us](#)

[Log in](#)

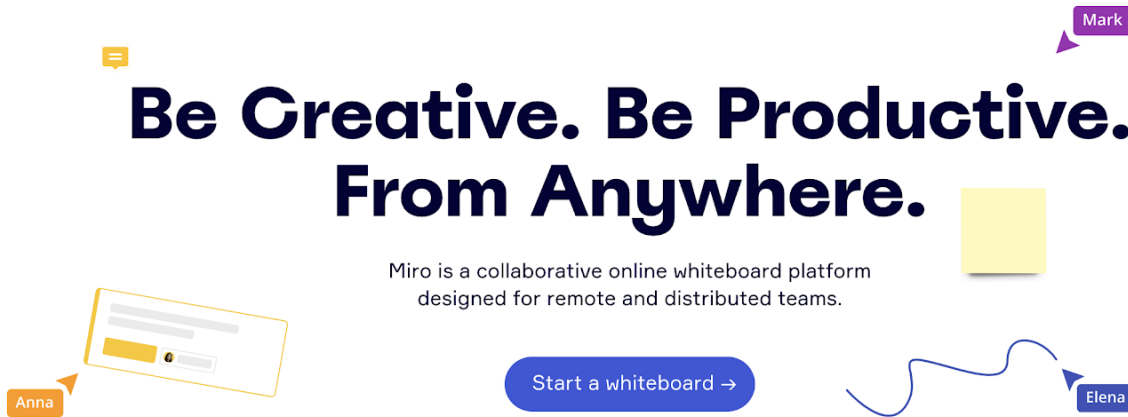
[Sign up free →](#)

## Be Creative. Be Productive. From Anywhere.

Miro is a collaborative online whiteboard platform  
designed for remote and distributed teams.

[Start a whiteboard →](#)

3 boards and unlimited teammates for free



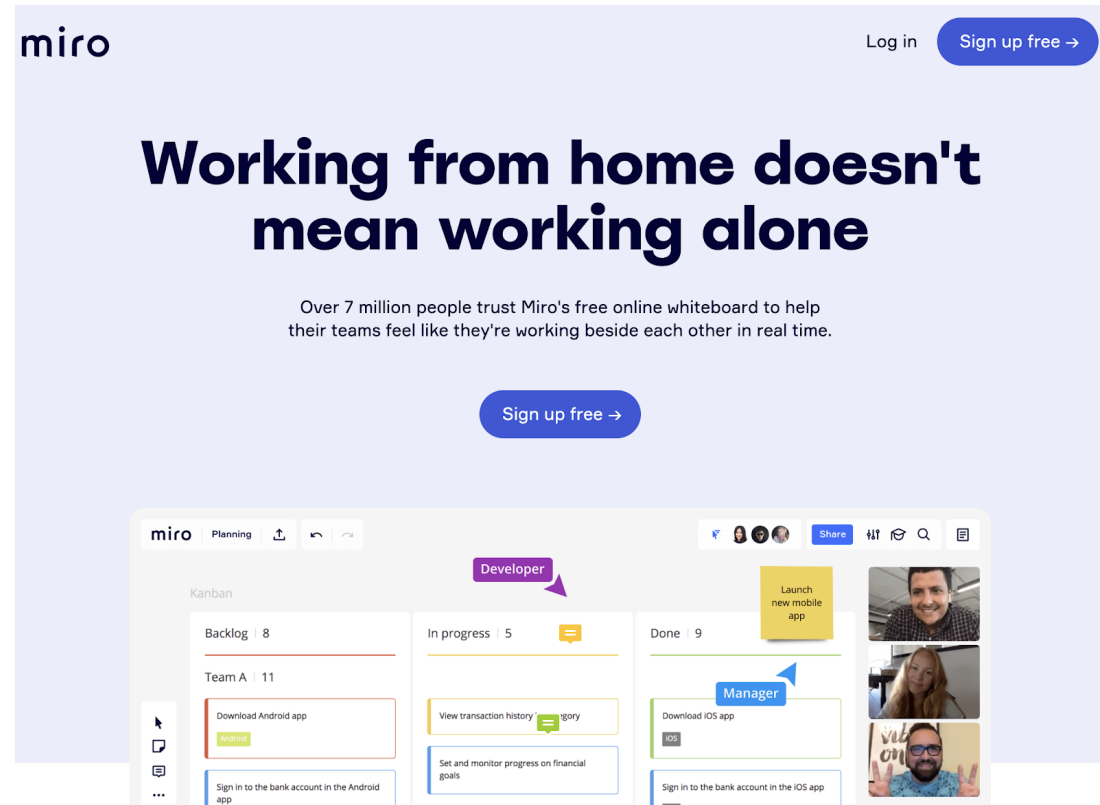
# Acquisition loop (paid Twitter)

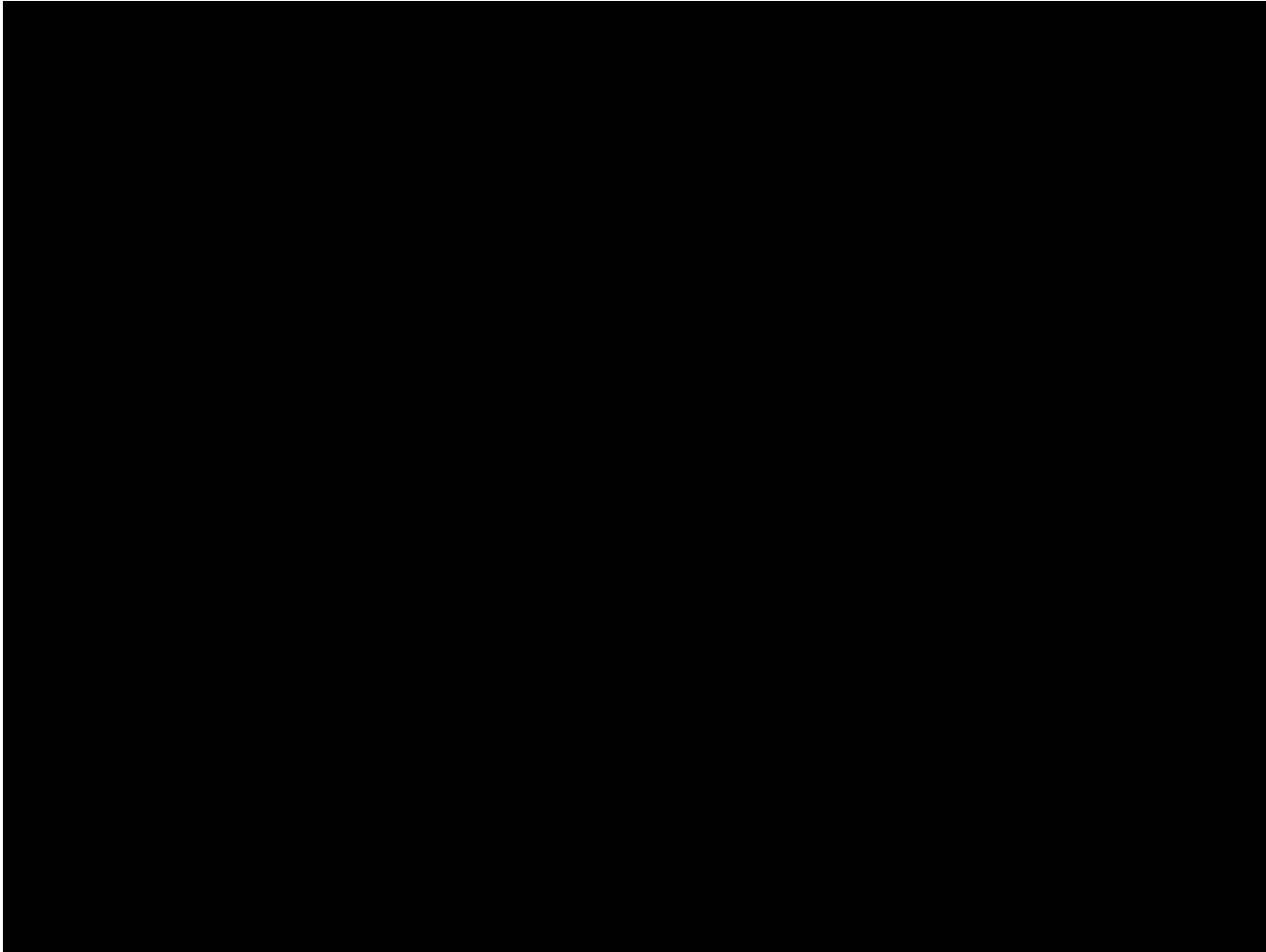
**miro**



# Twitter → Landing Page → Sign up free (EPAG)

miro





# Miro's activation pathway







miro

miro

Sign in

## Get started free today

No credit card required

 Name	
 Work email	
 Password 8+ characters	

I agree to Miro [Terms](#) and [Privacy Policy](#).

Get started now

Or sign up with:



Included for Free:

3 editable boards • Core integrations • Templates  
Unlimited team members • Anonymous board viewers

## Set up your team

Enter your team name
Choose your role in a company ▼

What's your company size?

Only me	2-50	51-250
251-1k	1k-5k	5k+

Anyone with @growthminded.co domain can join

Set up and continue →

## Invite teammates

 Invite from Slack or  Gmail contacts

Copy this link and share in your work messenger:

[https://miro.com/welcome,](https://miro.com/welcome)

Copy

Enter emails here

Send invitations

Skip for now



## What do you want to do?

Choose the area you want to work in and we'll help get you started.

Meetings and Workshops



Research and Design



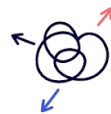
Mapping and Diagramming



Strategy and Planning



Ideation and Brainstorming



Agile Workflows



Didn't find what you wanted to get started with? [Start from scratch](#) →

Access your boards faster by installing the Miro app on your device.

**Choose a template**

Search

All templates  
Recent

**CATEGORIES**

Miroverse **NEW**

Recommended

Popular

Building Blocks

Demo Boards

**USE CASES**

Meetings & Workshops

Ideation & Brainstorming

Research & Design

Agile Workflows

Strategy & Planning

Mapping & Diagramming

**CUSTOM TEMPLATES**

Shared

Show when creating a new board

**Remote 5-Day Design Sprint**

**Virtual 4-Day Design Sprint**

**Brainwriting**

**Retrospective**

**Quick Retrospective**

**Journey Mapping**

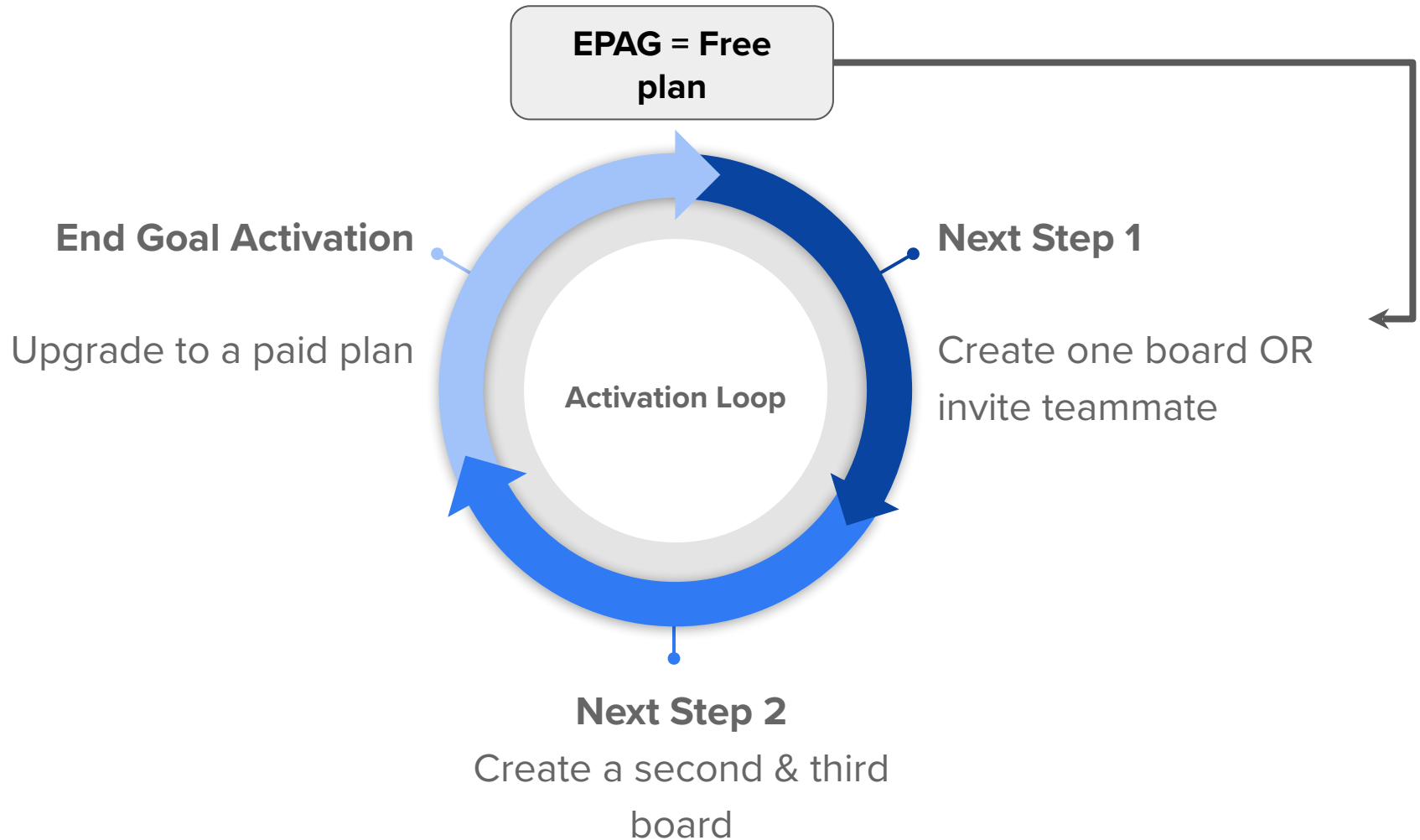
**Dot Voting**

**Ice Breaker**

**5 "Whys" Analysis**

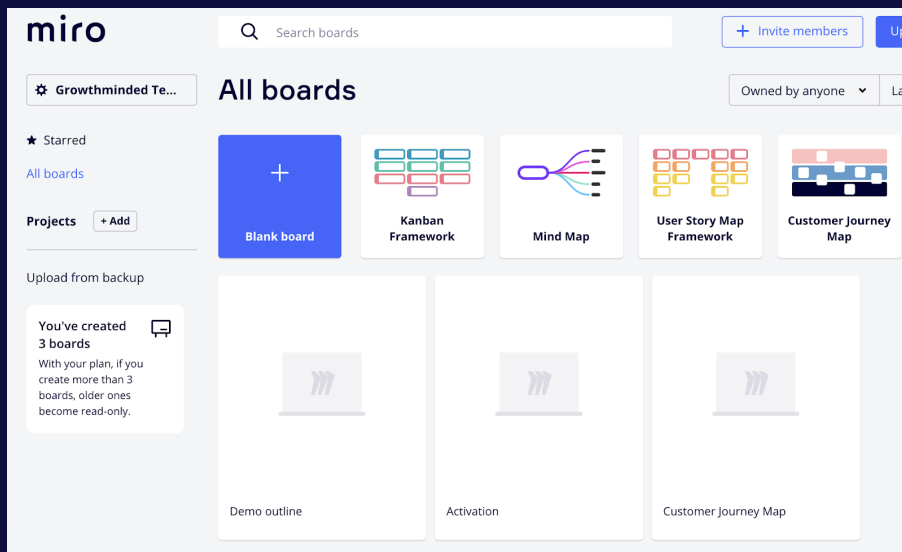
# Miro's activation loop

miro



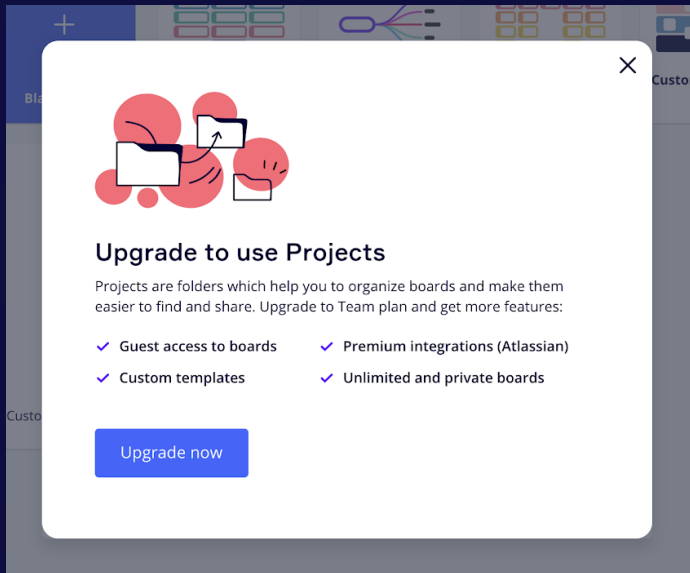
How does Miro move users?

Via constraints and internal growth loops with your team



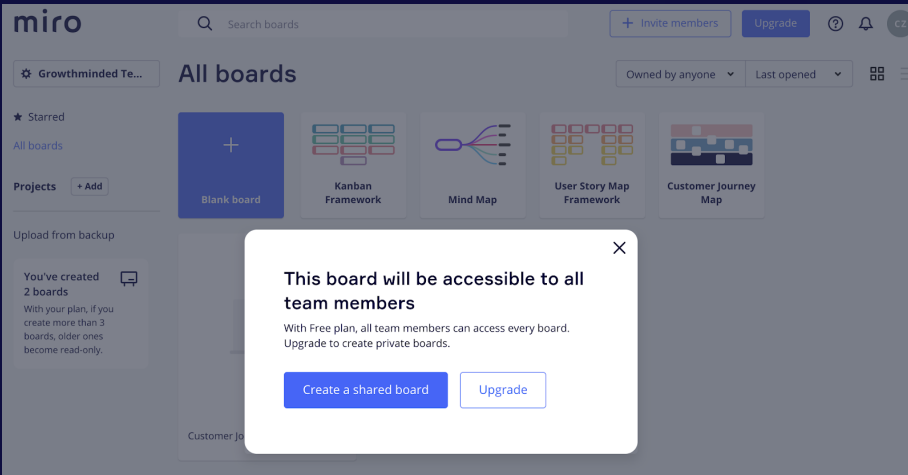
Only three boards can be live at once

By creating a board, you only have two left. By inviting a teammate, you'll likely get to three boards faster.



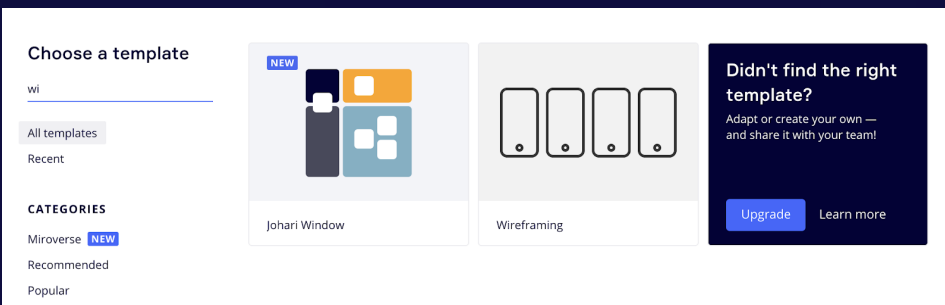
Only one project can be created at a time

Once you invite a teammate, you probably will have more than one project for the company. This will lead to more boards and the need for more than one project.



Boards are open to all teammates

If you have multiple teammates and more than one project, you may want to limit access to only relevant teammates.



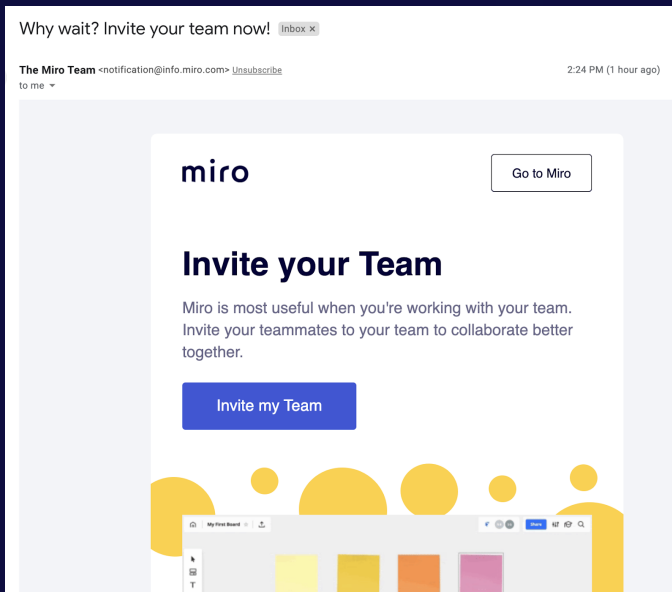
Templates are limited - upgrading unlocks more options

Once you are using the product and want to do more things with it, you'll likely need more template options.



# Drip campaigns keep you on track

<input type="checkbox"/>	☆	The Miro Team	Inbox	👁️ Get the most out of Miro - //miro .com/index/?track=true&utm_source=onboarding%20flow&ut...	2:14 PM
<input type="checkbox"/>	☆	Xenia from Miro	Inbox	Any questions about Miro plans and pricing? - //miro .com/index?utm_campaign=Abandoned+pay...	Aug 22
<input type="checkbox"/>	☆	Miro	Inbox	Congratulations! craig@launch.co has joined your Team - co has joined the Growthminded Team te...	Aug 22
<input type="checkbox"/>	☆	Matt Mulholland	Inbox	Get the most out of Miro   [Product Training] - Manager at Miro. I'm so happy that you signed up for...	Aug 22
<input type="checkbox"/>	☆	<b>The Miro Team</b>	<b>Welcome to Miro</b>	- //miro .com/index/?track=true&utm_source=onboarding%20flow&utm_medium=email...	<b>Aug 22</b>



More team pushes!

As the account owner I'm now getting these

The screenshot shows the Miro account upgrade interface. It features a navigation bar with 'Working with team' and 'Working with clients' tabs. Below this, four plan options are presented in a grid:

Free	Team	Business	Company
\$0	\$16	\$320	Custom
Unlimited members	2 members /month billed yearly or \$20 billed monthly	20 members /month billed yearly	Custom pricing. Please contact us for more information
Current plan	Upgrade	Upgrade	Contact us
Free features:	All Free features, plus:	All Team features, plus:	All Business features, plus:
3 editable boards	Unlimited editable boards	Single Sign-On (SSO)	Advanced security & controls (SSO, SCIM, Domain Control, audit logs)
Anonymous board viewers	Private board sharing	Day passes for occasional collaborators	Advanced administration settings
Premade templates	Unlimited anonymous board editors	External Editors	Multi-team setup for centralized company-wide account management
Core integrations	Unlimited external board viewers and commenters	Flexible payment options	Sharing permissions & link access controls
Mobile Apps	Advanced attention management		Azure DevOps and CA Rally integrations
Basic attention management	Projects		Dedicated customer success
Current team members: 1			
Current team boards: 3			

# End goal

The onboarding and features support more product engagement which leads to the constraints being hit faster, which leads to an upgrade.

# Tracking activation metrics

---

# Activation cohorts

	Trial signup week	1	2	3
<b>EPAG</b>	# trials	301	387	456
<b>Next step 1</b>	Created 1 board	223	300	388
	% trial users	74.09%	77.52%	85.09%
<b>Next step 2</b>	Created 2-3 boards	44	45	65
	% trial users	14.62%	11.63%	14.25%
<b>End goal</b>	# paid	15	18	22
	% NS2 to paid	34.09%	40.00%	33.85%
	% full trial to paid	4.98%	4.65%	4.82%

If you can't...

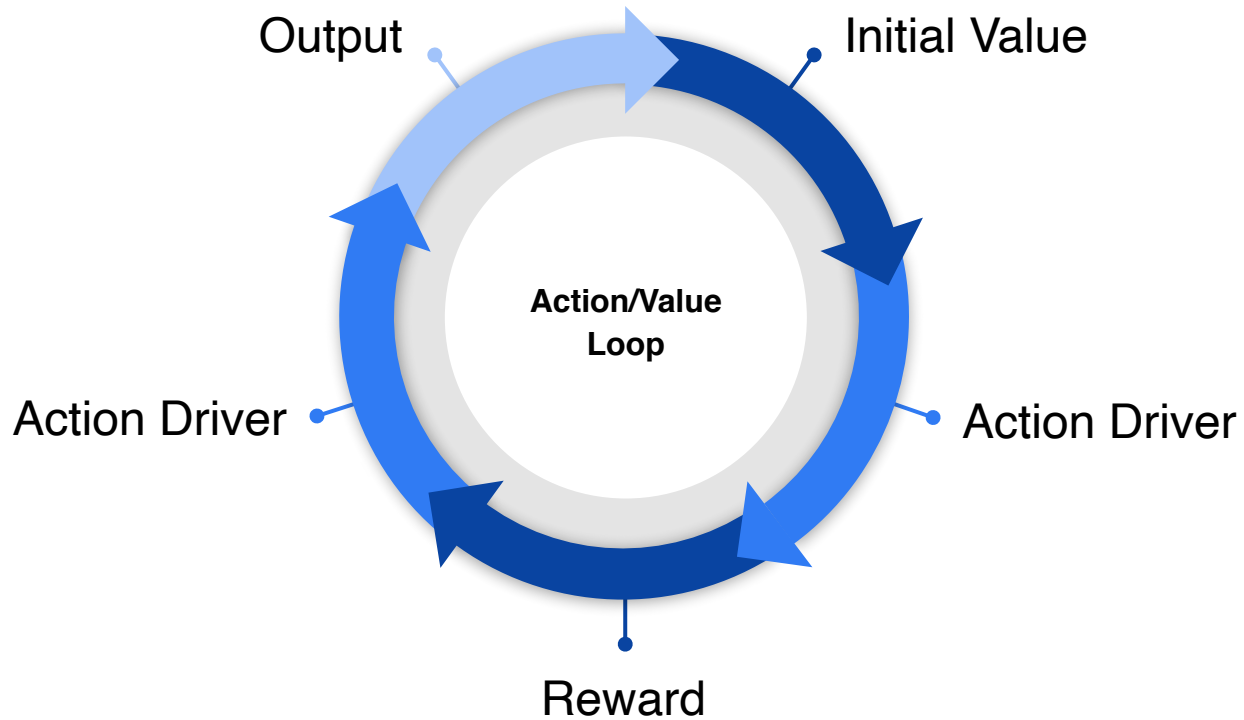
If you don't have the tooling in place to handle cohorts yet, don't worry.

- Track your metrics on a weekly basis but be mindful that there will likely be a time lag between steps in the journey, so attribution of events may be wrong
- But it should normalize over time to some degree

# User Psychology and Value/Action/Reward Loops

---

# Value/Action/Reward Loop





# User psychology & triggers

---

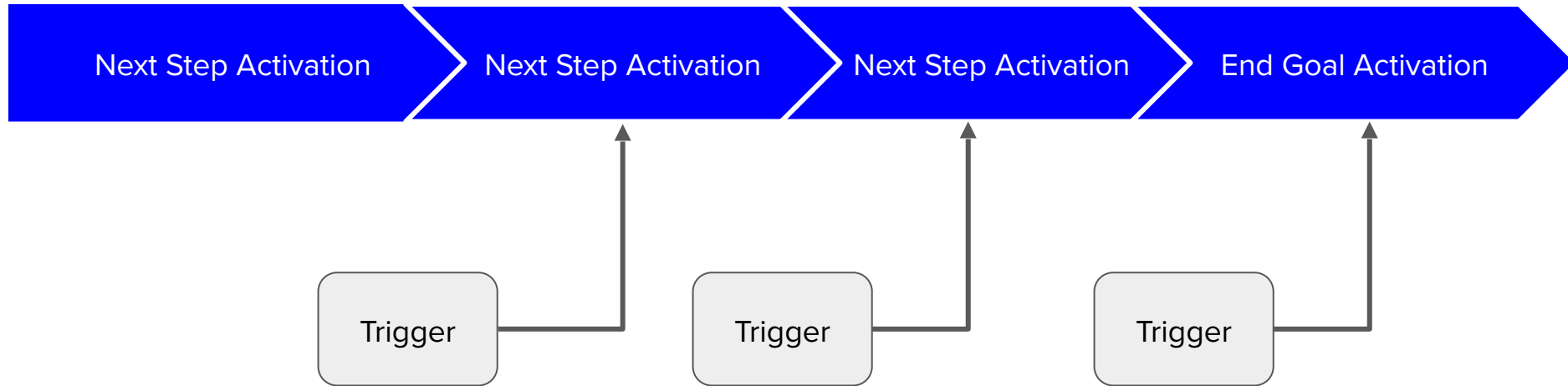
# Types of triggers

The main types of triggers are:

- Action
- Time
- Value
- Emotion
- Scarcity

Or a combination

# Triggers often come between steps



Thanks!

---

# Additional Materials

---

# Worksheets

---

# Worksheet: Goal Mapping & Key Metrics

Once you have goals, set your key metrics.

## Next Step Activation

**When a user visits my site/app, my 1st next step goal is:**

---

---

*Key metric:* \_\_\_\_\_

**My 2nd next step goal is:**

---

---

---

*Key metric:* \_\_\_\_\_

**My 3rd next step goal is:**

---

---

*Key metric:* \_\_\_\_\_

## End Goal Activation

**My end goal activation is to get my user/buyer to:**

---

---

---

*Key metric:* \_\_\_\_\_

# Worksheet: Value/Action/Reward Loop

Work from Initial Value to Output

**Initial Value**

---

---

---

**Action Driver 1**

---

---

---

**Reward**

---

---

---

**Action Driver 2**

---

---

**Output**

---

---



# Worksheet: Triggers

What ideas for Triggers do you have?

**Action**

---

---

---

**Time**

---

---

---

**Value**

---

---

---

**Emotion**

---

**Scarcity**

---

# How D2C brands drive to 1st purchase

---


# Observations

- Many D2C brands have a quiz to start that uses personalization
- This helps you buy into the brand (user psychology)
- Almost all try to capture an email
- They leverage email activation via drip campaigns
- Try to get you back to the “cart” or onboarding flow
- They offer discounts to get you to purchase


# Imperfect Foods



How many eaters in your household?

 1-2


 3-4


 5+


Next




Any dietary preferences?

 I eat it all

 Low Carb

 Vegetarian

 Vegan

Next

# Imperfect Foods



What type of produce do you typically buy?



Organic



Regular



I buy both



Next



What's your most important meal(s) of the day?

(Check all that apply)



Breakfast



Lunch



Dinner



Next

# Imperfect Foods



PERSONALIZE



CREATE AN ACCOUNT



SET UP DELIVERY



CHECK OUT

Excellent choice! Now it's time to create an account.

E-Mail Address (this will be your username)

Create a Password (must be at least 8 characters)

Show Password

Continue

Already have an account? [Log In!](#)

## Subscription Summary



**Organic produce** \$35\*  
17-19 lbs



**Grains Pack** \$6.99\*  
2-3 items



**Meat & Fish Pack** \$9.99\*  
2-3 items



**Snack Pack** \$9.99\*  
2-4 items

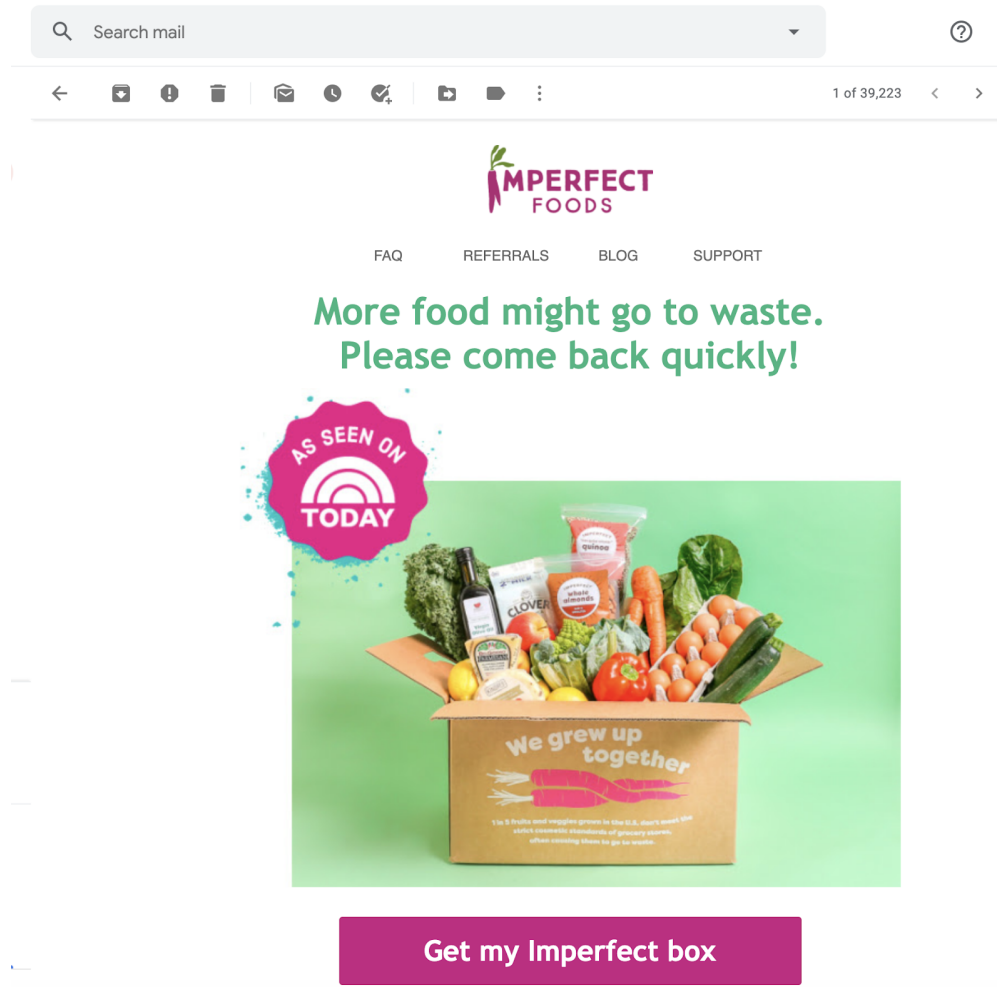
*\*Specific items vary by availability. We prefill your box with curated products, then you customize it!*

**Weekly Estimated Subtotal: \$62**

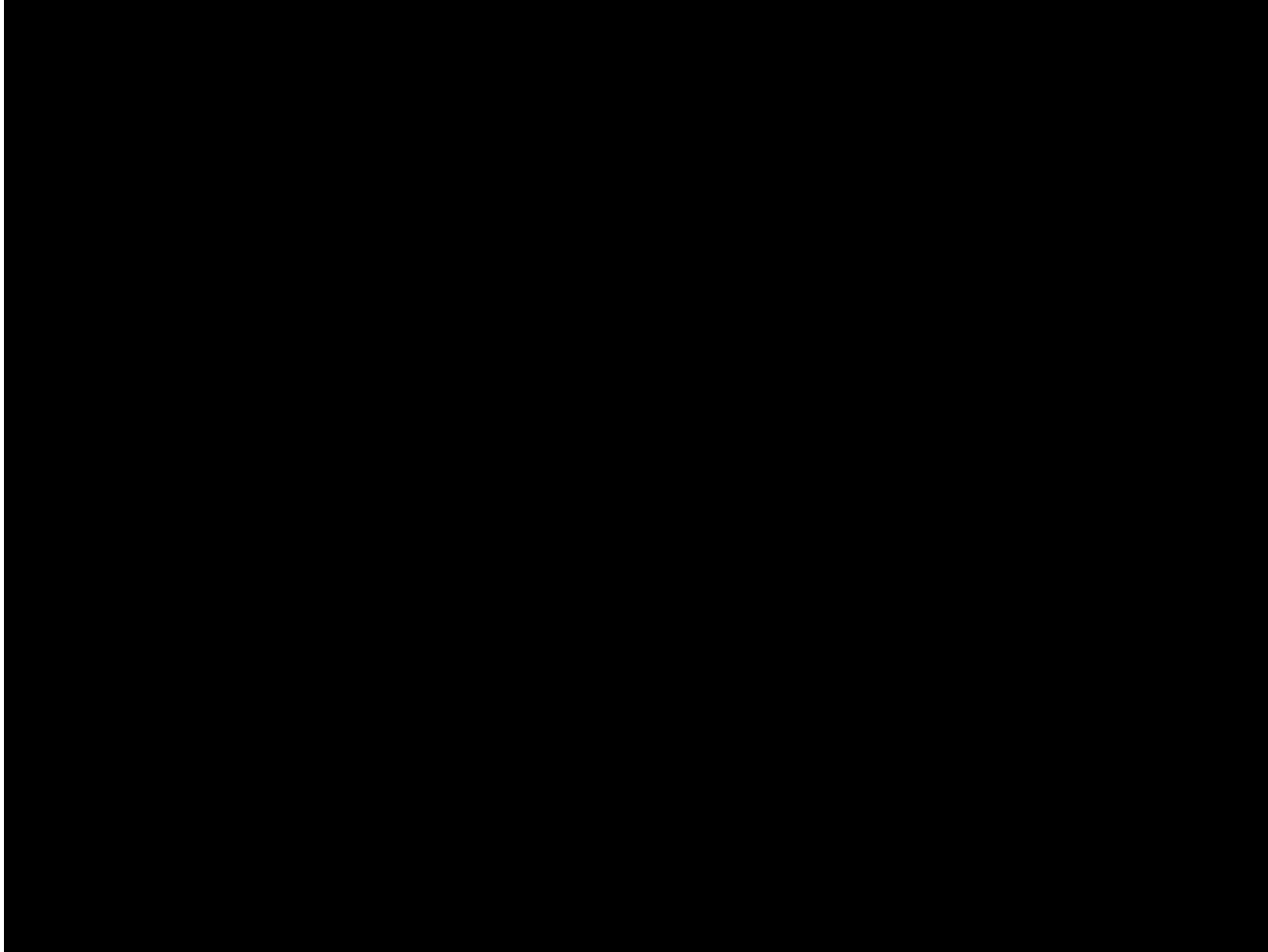
**Free to sign up!**

*No charge until you shop & receive your groceries*

# Imperfect Foods



# Barkbox pre-onboarding





# Barkbox personalized emails

Hey, we're BarkBox. 🐾 Is your dog home? 🐾 Inbox x



Scout from BarkBox <scout@woof.barkbox.com> [Unsubscribe](#)  
to me ▾

Sun, Aug 23, 11:24 PM (12 hours ago) ☆ ↶ ⋮

View email in your browser

Get an introductory crash course in all things BarkBox!

Contact

**BARKBOX**



# Barkbox personalized emails

Jingle thinks you left something in your cart [Inbox x](#)



Scout from BarkBox <scout@woof.barkbox.com> [Unsubscribe](#)  
to me ▾

Sun, Aug 23, 11:44 PM (8 |

**BARK<BOX.**

## Hey! You Left Something (Awesome) in Your Dog's Cart

### Order Summary

1 Item



1 x Monthly Surprise  
That Will Make Your  
Dog Absurdly Happy

HERE'S WHAT'S INSIDE:

### HERE'S WHAT'S INSIDE:



2 x Unique Toys,  
Designed by Us



2 x All-Natural  
Bags of Treats



1 x Yummy Chew

Shipping

Free

Total

You can't put a price on dog happiness.  
But we had to, and it's about \$25/month.

[RETURN TO MY CART](#)

# Barkbox personalized emails

How's \$60 of free BarkBox toys sound to Jingle? 🐾 Inbox x

Scout from BarkBox <scout@woof.barkbox.com> Unsubsc... Mon, Aug 24, 11:44 PM (9 hours ago) ☆  
to me ▾

**BARK<BOX.**

**Your Cart Just Got  
a Biiig Upgrade**



We want to make it easy to make your dog happy. That's why when you sign up for a **6-month plan**, we'll give you a **free bonus toy in every box!**

See what they're doing?

- Highly personalized
- Using my dog's name as part of the subject line
- Feeding me content along the way



# Red Tricycle activation

---

# Red Tricycle email capture



EVENTS THINGS TO DO LOCAL FLAVOR FAMILY MEALS CELEBRATIONS FAVORITES  
Halloween SF Home Page 2013 TAA Winners Back To School Partners CONTACT ABOUT US

red tr

SEARCH

ENTER YOUR EMAIL ADDRESS SELECT EDITION SUBMIT!

Don't ever miss the scoop.  
Get the coolest family adventures delivered to your inbox.

Get the

celebrations >

2014/10/16 |

Where

We may not  
savor a slow  
some autumn  
colorful leav  
colors with

to Events

tions For Y

th Spiders

d ( map )

y...

f Fantasy...

See Mo

ite Survey

ANSWER BELO

s healthcare pro

I'm already a subscriber No, Thanks



## What worked & didn't work?

### What didn't work?

- Tons of design changes to overlay (my gut said it would)
- Messaging and fields for data capture

### What did work?

- Frequency of showing modal increased subs by +46%

### What we did?

- Used to show “no thanks” and hide modal for 3 months
- Changed to reappear after 15 days
- I'm already a subscriber - show again after 3 months



# Email Open Rates

**Experiment:** Email open rates

**Goal:** Increase the open rates for our 3x per week email

**Measurement:** % increase or decrease in open rate over last 3 months average (baseline/control)

**Test(s):** Implement A/B test in email system for subject line, send times, day of week, etc. doing one test at a time



# Email open rates. What didn't work?



- Changing send day of week
- Changing frequency (daily, *#/wk*, *#/mo.*)
- Altering from name
- Image & text placement
- Pre-header message

# Email open rates. What did work?



## Subject Line Tests

- Not surprisingly, subject line testing improves open rates
- A/B test all the time
- Enables you to take some chances with bolder ideas
- Always test 2 to 3 options
- Send to 10% total list (winner auto-chosen)

# Test results (winners on top)



- +50%** “The Secret to a Calm Kid”  
“Yoga Studios for Atlanta’s Small Set”
- +44%** “Mom Workouts You’ll Swear By”  
“Prenatal Fitness Classes to Keep You Moving”
- +39%** “It’s Like Sailing, Only Better”  
“5 Places to Pedal Boat”

# Small ideas might produce huge results



By adding personalization to the sign up box, we saw a +300% increase in sign up rate. Notice the city - it's a tiny change, but a huge impact.

Get the scoop on the best family activities in San Francisco.

enter your email address



CHOOSE YOUR EDITION...


**SIGN UP**

# Email open rates. What did work?



## Send times

- Time of day of sent made a HUGE difference
- +100% increase in open rates by sending @ 8pm instead of 9am



**Kim Bongiorno**  
@LetMeStart

Let Me Start  
By Saying  
by Kim Bongiorno

[Follow](#)

I love you kids so much I want you to experience the adventurous joy of dreaming from your beds in silence for many hours RIGHT NOW PLEASE.



# Takeaways?

Find your 8PM!

- Test everything along your activation pathway
- Be bold, take some risks
- Find your brand voice, use it!