

How Inturact worked hand-in-hand with a South African business review platform to improve their onboarding process conversions by 77%.

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Our understaffing of business struggles doesn't come from an abstract perspective, but as founders ourselves.



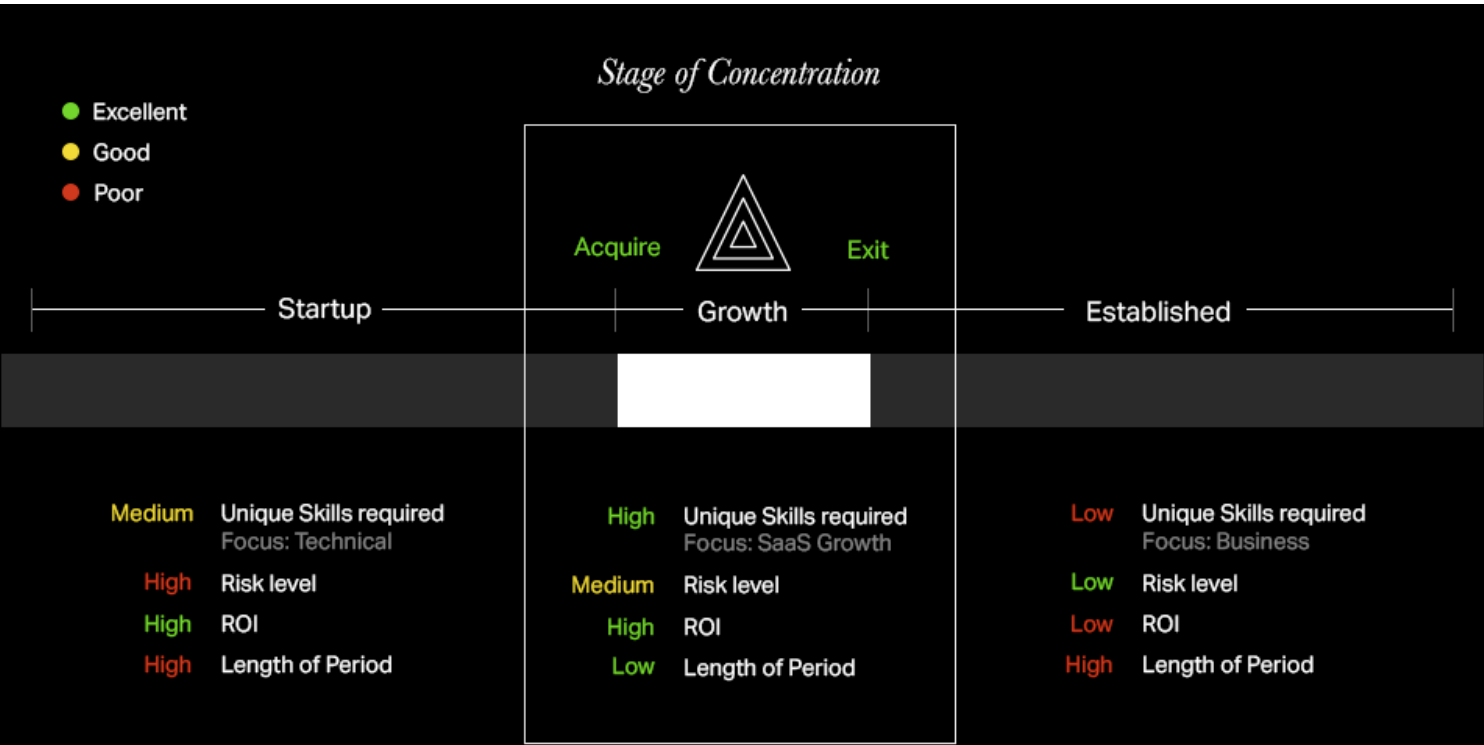
Trevor Hatfield
Founder & Head of Digital Strategy of Inturact

Inturact was founded 18 years ago with a focus on website development for small businesses, but our passion quickly evolved into supporting B2B SaaS companies. Leveraging our extensive experience, we've created specialized frameworks and best practices to assist these companies in growth.

We don't just preach strategies; we've lived through the development of vital business practices. From the days before Product-Led Growth (PLG) was known to the time when pirate metrics were coined, our expertise has always been on the cutting edge.

We relate to the real challenges and joys that accompany running a business, making our approach to client problems unique and empathetic.

Two years ago, we broadened our horizons by starting a private equity fund, dedicated to purchasing and growing our own SaaS businesses. This venture allowed us to test and prove the efficacy of our most innovative frameworks.



Currently, our clients primarily seek our assistance in enhancing their user onboarding experiences, an essential aspect of subscription-based businesses. By converting new users into paid and loyal subscribers, we've contributed significantly to their growth. One client's onboarding rates soared by 77%, leading to more investment for their company.

Our achievements don't just translate into numbers; they're personal successes that motivate our entire team. Whether it's helping clients enhance their onboarding rates or aiding them in securing investments, the tangible results of our efforts are what fuel our commitment and passion at Inturact.

Client Background and Initial Challenge

The client is akin to South Africa's version of Yelp, providing a platform for local community business reviews. However, the unique cultural context of South Africa posed a significant challenge. There, a general apprehension towards new technologies, particularly online credit card payments, was hindering their user subscription process.

The issue wasn't related to technical features but centered around relationship-building. Potential subscribers needed assurance that it was safe to subscribe. Complicating matters further, the client's product lacked essential tracking mechanisms, rendering it impossible to measure if onboarding rates were improving.

Recognizing these challenges, the client sought our expertise to revamp their onboarding process. Their primary goal was to improve user trust, consequently scaling revenue and securing the next round of funding.

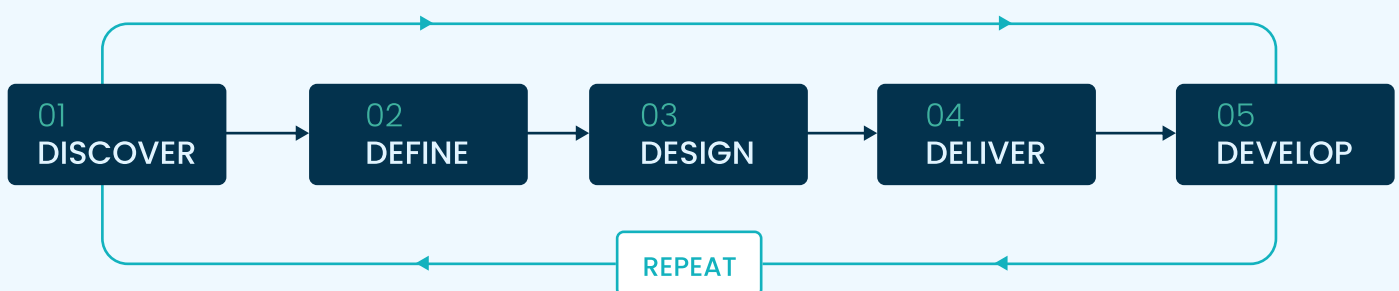
Before engaging with our agency, the client's approach to onboarding was flawed and ineffective. Their strategy focused on instilling fear in users about negative reviews, a decidedly negative and fear-oriented tactic. The in-app experience felt disjointed, with a "point at everything" approach, and their emails were more functional than relational. This lack of a cohesive, trust-building strategy led them to seek our specialized assistance, recognizing that **their current methods were not aligned with their audience's needs and expectations.**

Identifying the Right Solution

The initial step we took, a standard practice with all our clients, was to implement product analytics. But we didn't stop at conventional analytics; we introduced a proprietary tool that functions like an x-ray into user behavior. This tool allows us to examine various segments, from the sign-up phase to retention, and provides invaluable insights into the customer journey.

While our analytics tool was busy gathering data, we shifted our focus to internal team alignment. Through a series of brainstorming sessions, we unified the team's understanding, allowing them to speak a common language. This collaboration led to an embrace of a new, positive, value-adding approach to product strategy and messaging. It was an alignment with the fresh direction that their new CEO was keen to pursue.

We applied the "Jobs to be Done" framework to identify the 5-7 minimal steps a community business would need to recognize the potential value in online reviews. These insights guided us in building a more personal and human-oriented approach.



Working closely with the client's sales team, we developed a hands-on process to engage with new users. By focusing on relationship-building and value demonstration, rather than fear tactics and functionality, we laid the groundwork for a transformation in their onboarding process.

Solution Recommended

The core principle behind the "Jobs-to-be-Done" framework is understanding that customers are essentially "hiring" solutions to enhance their lives. They're not solely concerned with your product; they're focused on how it improves their overall experience. This approach informs everything from product roadmapping to positioning, messaging, and, crucially, user onboarding.

When our team embraced this perspective, we quickly recognized that the client's approach was overwhelming users by asking too much, too soon, and in an ineffective manner. Jobs can typically be broken down into 7-8 distinct phases, and within each phase lie smaller, specific steps. By meticulously mapping these out, we were able to pinpoint exact gaps in both the product and the process.

It's not uncommon for us to work with founders of remarkable products who need assistance in stepping outside their perspectives to gain clarity. An external team like ours can provide that strategic foresight, enhancing overall execution.



ACQUISITION



ACTIVATION



RETENTION



RETENTION

After three months of gathering product analytics data with our proprietary tool, we identified specific onboarding steps that were causing drop-offs, leading to lower 12-week retention rates. This data wasn't just diagnostic; it guided actionable improvements. It shaped their product roadmap, the construction of new emails, and the development of a more intuitive in-app walkthrough.

Our approach went beyond mere problem-solving. By focusing on the user's lived experience and applying the "Jobs-to-be-Done" framework, we cultivated a holistic understanding of the client's needs. **The result was not only an improvement in onboarding and retention but a transformation in how the client approached their product and user relationships.**

Campaign execution: the importance of listening

We run meetings in a unique way. Based on the L10 meetings from Traction, clients meet with us for 1-hour a week in a format that gets more done in an hour than most meetings can do in 3.

It works like this:



Meetings start with a grounding exercise. Everyone is invited to share a recent win, personally or professionally. More shy members of the team, when they speak up in the first 3 minutes of a meeting are more likely to contribute later. We “take a step back so we can all take steps forward together”.



Next, we work on accountability. What was committed to get done last week is reviewed. If it's not done, we figure out what the blockers are. The main part of our consulting meetings are actually working on something. Unlike a hustle or stand-up, we roll up our sleeves and do work, together.



After assessing the main issues with their onboarding process, we then wrote, designed and implemented a new series of event triggered emails as well as a compelling in-app experience. With the new tools in place, we could tell right away what steps or emails needed to be optimized. From observation, we made hypotheses, which fueled ongoing growth experiments.

This client was growing rapidly as a team. Every month, a new person would join our calls. A new salesperson. A new marketing intern. Pretty soon, we lost momentum. So much time was spent getting the new people up to speed. And their inputs started to make solutions more and more complicated in order to accommodate them.

The CEO is a great leader and working with us, recalibrated his team to just the 3-4 people needed to be involved. This core group got more done because we were aligned.

Basically, leadership is making the hard calls. That CEO had to tell a lot of people not to show up any more, while at the same time make them feel valued and important to his organization.

We often learn more from our clients than they learn from us! What a lesson in fantastic leadership.

As a result, we deployed a major update to their onboarding process and made big improvements to their sales and support outreach as well.

Final results:

When “success” REALLY is success

After launching the new onboarding emails and in-app experience, we watched as their numbers started to go through the roof. By the end of the year, they increased their onboarding conversions by 77%.

The right segments of their users were getting the right messaging. The more qualified users were getting personal calls from a more efficient sales team. Trust was built and the inertia of the new user was overcome.

Quite soon after these results came out, the client called us to let us know they just secured another round of funding.

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“Since starting with Inturact, our number of leads, demos, and customers has steadily increased. They have brought a level of services that we could not have created ourselves. In summary, Inturact is our marketing department. We've been very pleased with them and plan to partner with them for a long time.”



Robert Davis
President and CEO, SmarterSelect

Even though most of the functions we performed for them have been brought in house at this point, they still hire us for website work and some recalibration of strategy sessions.

Excerpts from our article published on [Website Planet](#)