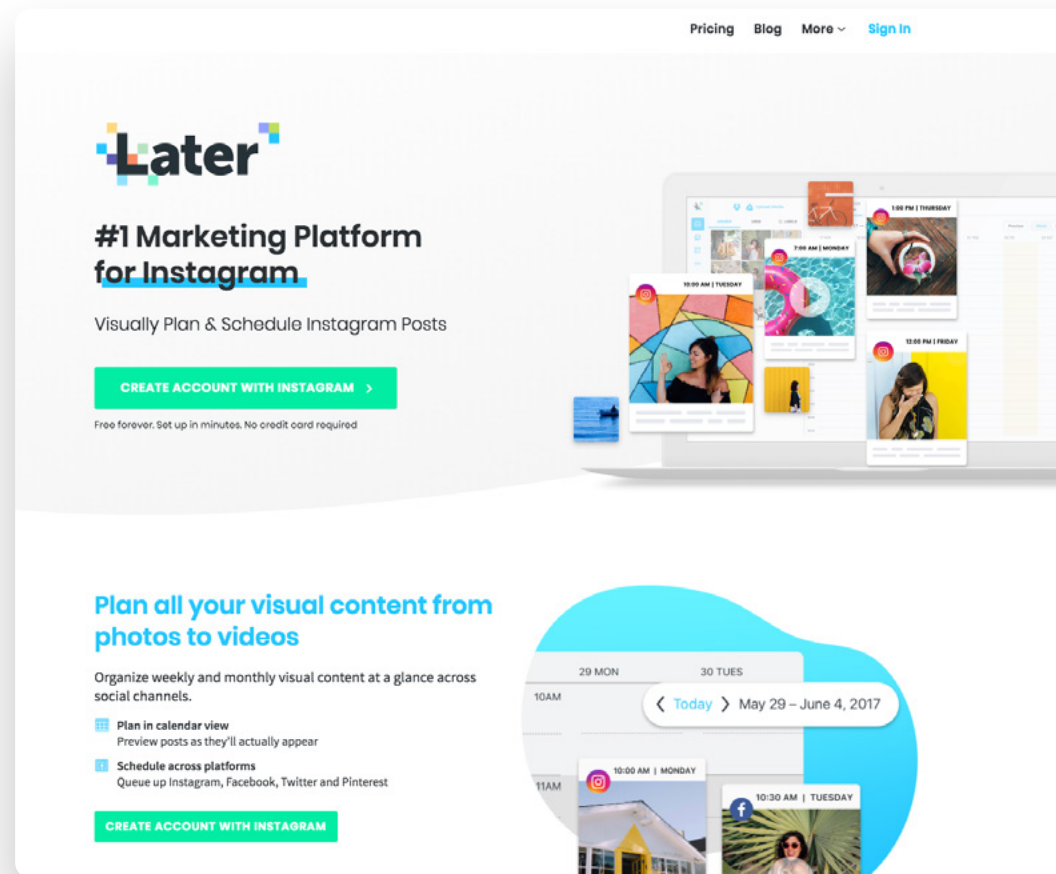


Thinkific Plus case study:
Customer success with online courses

How Later increased customer retention by 320% by turning a webinar into an onboarding course.



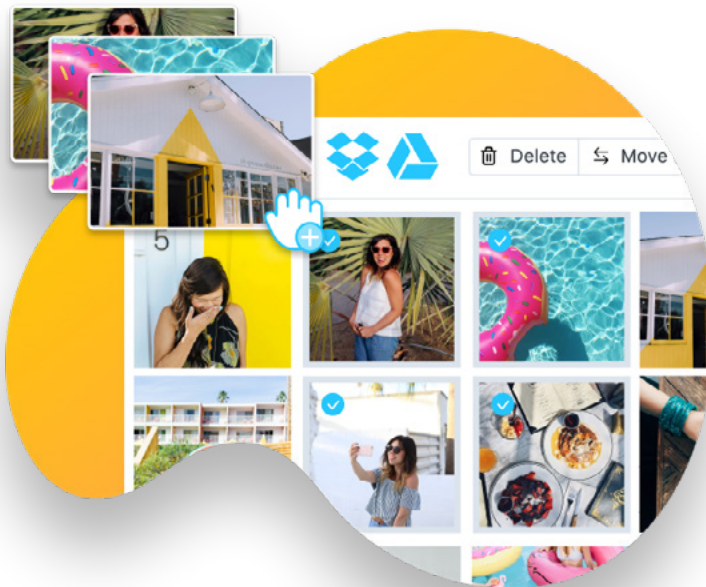
Later wanted a boost in retention and user adoption of features

Later is the #1 Instagram marketing platform helping companies schedule and plan their visual marketing strategy. With Later, businesses can not only schedule Instagram and social posts, but also plan their entire visual content calendar, optimize their workflows, and curate their content.

that happens after a user signs up; including onboarding, retention, and ensuring customers see Later's value right away. Later's onboarding process first consisted of weekly webinars. But as their resources and time were stretched, they thought, 'what if we tried an online course?'

As Later is a software platform, the main job of its Customer Success team is to ensure users understand how Later's features work, and how they can be incorporated with their own businesses. The most crucial time for understanding this is during the onboarding process, usually within a user's first week. Desiree Evanshen, Later's Customer Success Manager, handles everything

We sat down with Desiree to learn about Later's choice to test their webinar content as an onboarding course, as well as to discuss the resulting metrics. Desiree shared with us that after the course, Later saw a 320% increase in retention, a 467% increase in adoption of features, and a 368% increase in purchasing paid plans!



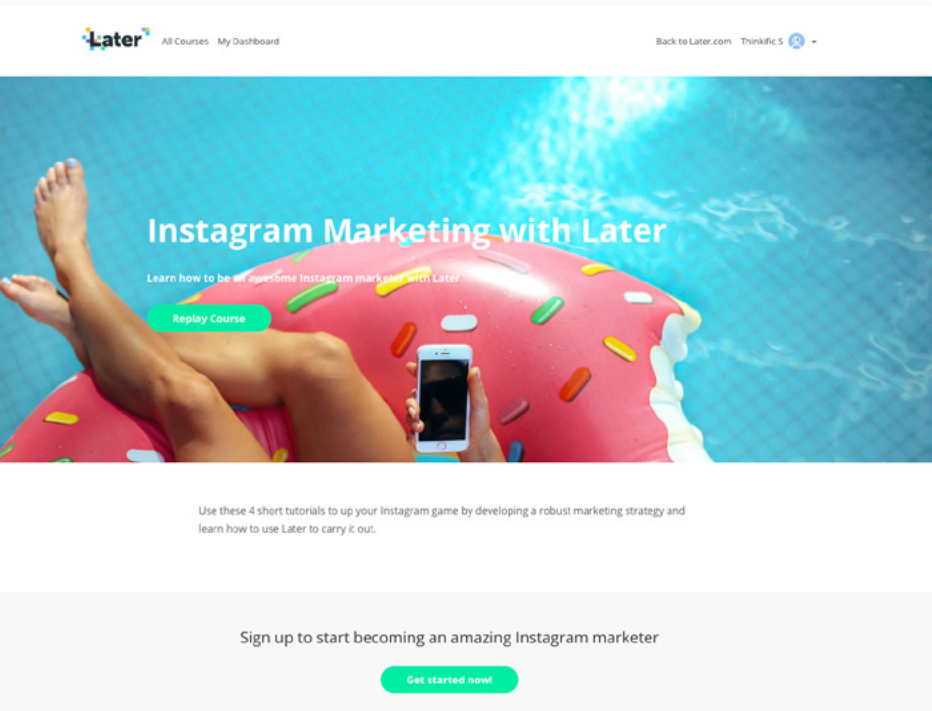
The Customer Success team wanted users to truly understand the ins and outs of the product. They needed to find a good way to deliver this information fairly quickly.

“We needed a more interactive way to help introduce [users] to the other tools, as well as show them how other Instagram marketers are using those tools and finding success within their strategies”.

The problem: how do you educate new customers about the best way to utilize all your platform’s features, not just its 2-3 core components?

Later’s onboarding process wasn’t engaging customers the way we were hoping. “Our onboarding consisted of email funnels and in-app messages, and we found it just wasn’t enough to get our users to adopt a lot of our most-loved features,” said Desiree. While users had no problem understanding Later’s core features, such as how to schedule an Instagram

post, they weren’t fully understanding how to use Later’s more involved optimization tools, including their auto-schedule feature and their Instagram visual planner. Desiree knew that these more extensive elements to the platform would help customers evolve their Instagram marketing strategy, and become long-term and loyal Later users.



The screenshot shows the Later website interface. At the top left, there is a navigation bar with the Later logo, 'All Courses', and 'My Dashboard'. At the top right, there is a link 'Back to Later.com' and a user profile icon labeled 'Thinkific 5'. The main content area features a large hero image of a person's legs on a pink inflatable ring in a pool, holding a smartphone. The title 'Instagram Marketing with Later' is overlaid on the image. Below the title is a subtitle 'Learn how to be an awesome Instagram marketer with Later' and a green 'Replay Course' button. A paragraph of text reads: 'Use these 4 short tutorials to up your Instagram game by developing a robust marketing strategy and learn how to use Later to carry it out.' At the bottom, there is a call to action 'Sign up to start becoming an amazing Instagram marketer' and a green 'Get started now' button.

Scaling the success of their onboarding webinar

In an effort to educate customers about the platform, Later began to host weekly live onboarding webinars. They immediately saw success in adoption of features and retention. However, even though the webinars were successful, the long process began to drain the Customer Success team's resources. "It took a lot of our time and resources to host these live webinars. As well, since we have users all over the world, it was limiting with timezones, and people just aren't able to sit down at a specific time and attend a webinar."

Later's team saw that although webinars were working (with measured success), they wanted the ability to scale and reach more users, as well as build an onboarding process that was lasting. With benchmark numbers set, Later's team decided to perform a test: run the same pre-recorded webinar content, but reformatted as an online course.

Testing out the right onboarding process: webinars or an online course?

Later's first online onboarding course began as a test. The team already knew the webinar content was working, and had kept track of the success metrics. They wondered: would they see an even bigger increase in adoption and retention if they took the same content from the recorded webinars, and reformatted it into an online course?

Once the idea was in place, the Later team immediately began. "I would almost say no planning, we just started setting it up," said Desiree. "We already had the content, we just needed to plug it in, and it was

basically ready within a few hours, with a bit of tweaking with the landing page. [The course] was up and running within a week".

In terms of testing, Later decided to do an A/B test with the invite emails previously set up for the onboarding webinar. One in-app message and one version of the email would direct new users to view the webinar, and a second version would invite them to the onboarding course instead. Later ran the test for 4 months before ultimately deciding to switch to online courses exclusively.

"We already had all the content that we were using from the webinar, which had been proven and tested...we decided 'hey [a course] would be a great way to scale this up.' And we had already heard about Thinkific Plus, and we knew it was a really great option for video content."

- Desiree Evanshen, Customer Success Manager at Later





Instagram Marketing with Later

100%

[See Overview](#)

[Rate This Course](#)

A course card for 'Instagram Marketing with Later' is shown. It features a background image of a poolside scene with a pineapple, a blue water bottle, and sunglasses. The card displays a 100% completion rate and includes buttons for 'See Overview' and 'Rate This Course'.

Expectations before the course launch

Since transforming Later’s webinar material into a course was just a quick test for the team, they didn’t go into it with a ton of expectations. “We did have some reservations around the fact that a webinar was a live, interactive thing - we thought perhaps people would be more engaged and we would see better results”, Desiree told us. A surprising finding was that, in fact, the ‘live element wasn’t as crucial as they thought! “I was surprised. That actually wasn’t the case at all. We actually saw more people attending the course than the webinar”, said Desiree. In terms of metrics the team was hoping to see, Later’s Customer

Success team was looking for similar adoption rates, or hopefully a bit more, from the webinar to the course. “I expected because the content was the same, that the course would have similar, comparable results to the webinars...I also had a hypothesis that we would have fewer people completing the course...I thought someone would watch the first video, and then potentially the second...and just drop off essentially as the videos went on. The interesting thing that we found, which was a really great result, was that our highest number of students watched all four of the videos [in the course]”.

The numbers speak for themselves!

After 3 months of running the new onboarding course, Later did a deep dive into the data and were amazed by their results. They compared the numbers between those who attended the course vs. attended the webinar, as well as measured all post-onboarding results against a control group who hadn't participated in any onboarding. They also looked for any differences in behavior between those users who adopted specific features vs. those who hadn't.

The results blew them away, especially since the content was verbatim the same from the webinars. By simply changing the onboarding content delivery method from a webinar to an online course, Later exponentially increased their numbers and scaled their business. As well, by focusing solely on the onboarding course, the company was able to free up much more of their time that had been taken up by scheduling webinars, planning the live shows, and ensuring the right people could be available to film them.

467%

Increase in adoption of features

320%

Increase in retention

368%

Increase in purchasing paid plans



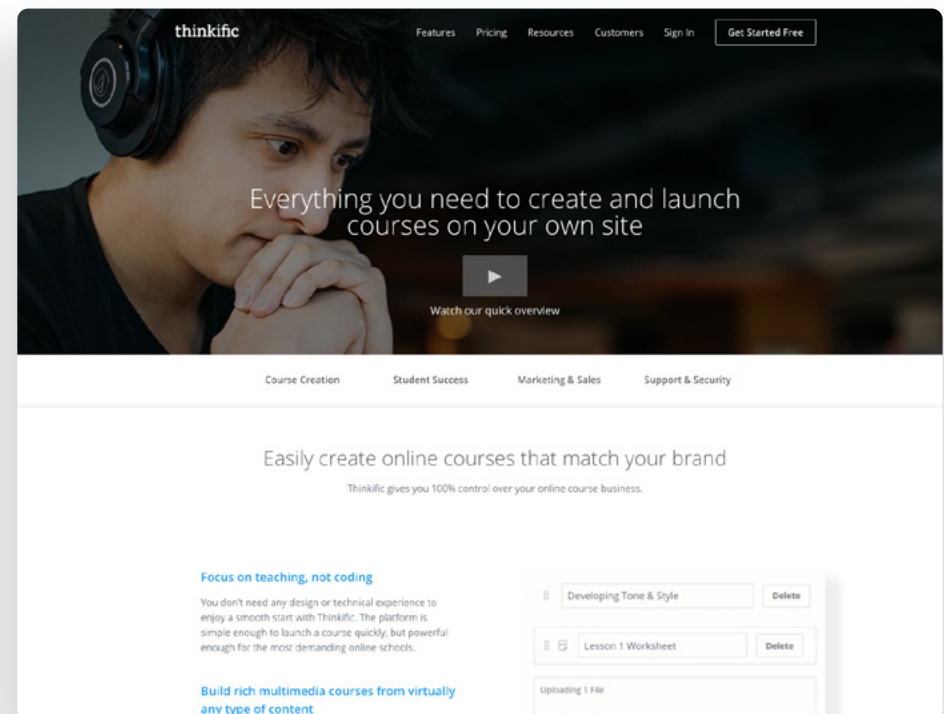
The future of Later's online courses

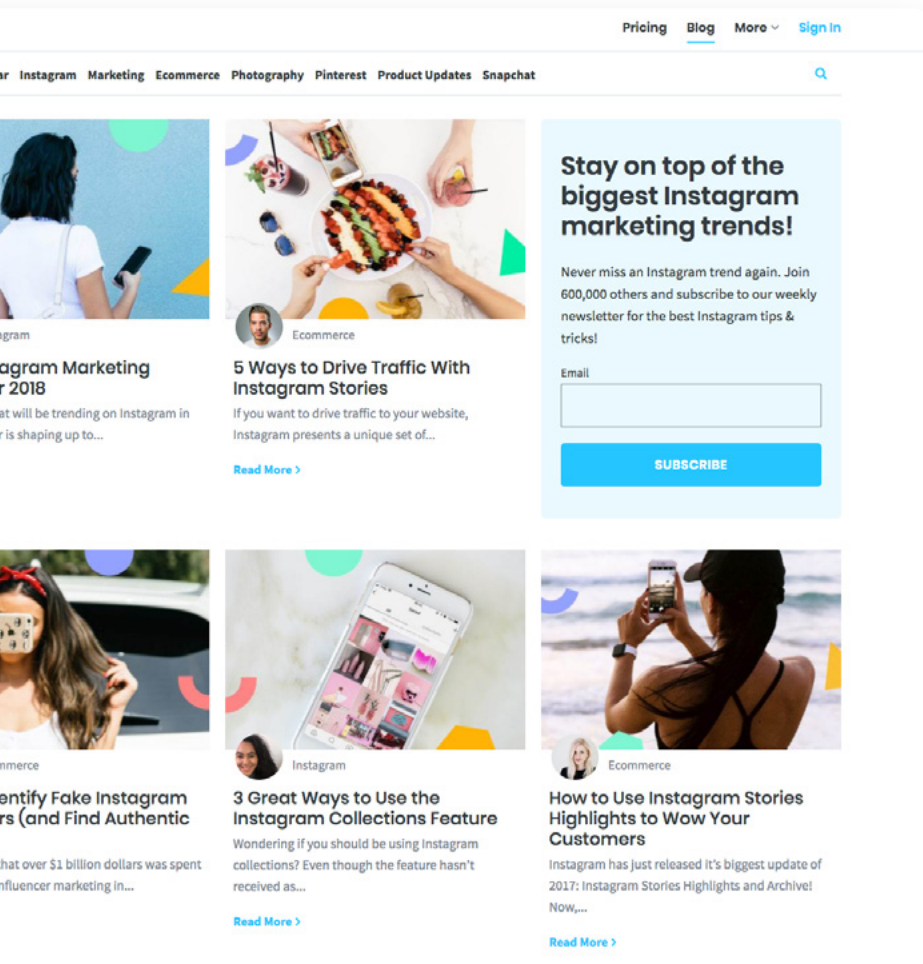
When we asked Desiree if Later had plans to scale this onboarding course into even more courses, she said, "Yeah absolutely. We've mapped out some plans for 2018. We plan to actually phase out completely our weekly live webinars as part of our onboarding and optimize the course. We want to introduce an SSO page to make it easier for our users to sign into the course. And the next phase for us is, in the first quarter of 2018, to redo all of our content. Redo the content, update it, and then completely phase out the webinar and just have the course as the main interaction of our onboarding process."

Desiree also spoke about the importance of constantly tweaking and updating the course content, especially for a fast-growing software platform like Later that introduces new features all the time. "The content we're redoing is based on our product, and how our product is evolving and changing. We've added new features that add a lot of value, and we've seen our customers have a lot of success with them". Thanks to the flexibility of the Thinkific Plus platform, Desiree and Later's Customer Success team can easily go in and update videos, add chapters, delete outdated material, and more."

Choosing Thinkific Plus as their course platform

“We knew that Thinkific Plus was one of the leading companies in the online video course industry - that’s why we decided to initially test the platform out”, Desiree said. Later spoke about finding the Thinkific Plus platform very simple to understand, and found that it was really easy to set up their course and customize both their landing page and course enrollment page. Desiree said, “We had about 70% of the course set up within an hour! By the end of the day, it was ready to go, so it was just a no-brainer to start testing it out”.





Later's tips for improving customer success

We asked Desiree for some tips she and the Customer Success team could offer after the success of their onboarding course. She was eager to help other companies improve their own customer success! Here were Later's top tips:

The first week is absolutely critical to hook users

It's crucial to have a plan for your new users. With their onboarding course, Later helped their customers discover not just how Later's features worked, but also how their business would benefit from continued use of Later's product. "It's important to show customers the value as quickly as possible, within the first week. For the majority of people, that's when they'll convert to being an active customer."

“You really want to add that hook in while they’re interested, and having a course within the first few days is going to hook them in”.

“Make it about how your customer is going to be successful within whatever industry they’re working in...sometimes that doesn’t even mean talking about your product. Sometimes you’re just educating your customers about what’s going on in the industry and how they can be better at whatever it is they’re doing.”

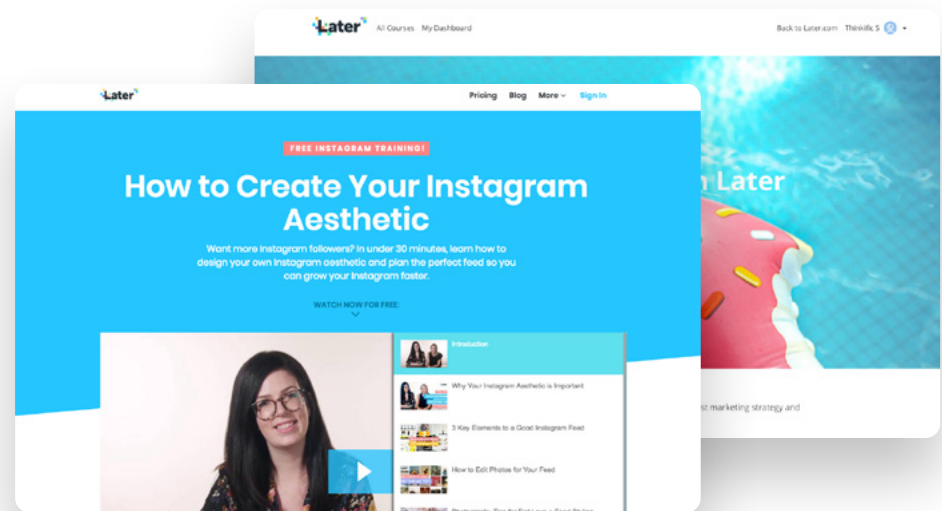
Move away from the ‘How to’ videos. Instead, focus on how to help your customers see value in your product

Later’s course content goes beyond simply introducing new users to their product. Instead, they know what their customers are hoping to get out of their platform (creating a better and more effective Instagram marketing strategy for their business) and taught a course on how to achieve that. Then, within the course lessons, Later showed users how to use Later’s features to level up their strategy and meet their goals. Desiree told us, “[the course] is all about building an Instagram strategy, and how you can carry out that strategy using Later. It’s really focused on how to become successful with Instagram, and essentially build a marketing strategy. ...and then how to introduce Later into that strategy”.

Helping your users see success in their own businesses makes you more successful too

Later talked about how important it was for them to see their users’ business succeed after using the platform, as it meant their customer success strategies were working. “Most people that are using us are small to medium sized businesses...so seeing the success of our users with their Instagram or their visual marketing strategy is important because that’s actually seeing success with their company. With their advertising, with their generation of online revenue, with their sales... and then of course that’s going to come back to us. That’s going to be why they’re going to think using a tool like Later is really crucial and important to them”.

Advice for other companies who want to use online courses to scale customer success



Don't be intimidated - it's easier than you think

Desiree said adding a course to onboarding was “absolutely crucial” and not as hard as people may think. “It’s way easier than you think. It was a scary process for me...knowing our webinars were succeeding but we needed to get them to reach more people. I didn’t know how to start. But once we started, I had no idea how easy it was going to be. Don’t let the technology scare you away”.

Make sure to set goals before you get started - and track them

“It was really important for us to set some goals before we even got started, and our goals were around retention and adoption, and increasing conversions to paid.” Desiree talked about how the Customer Success team at Later uses what they call a ‘Playbook’ before any new campaign to create a detailed project outline, set specific goals, and set tracking numbers. That way, it’s easy to refer back to the beginning once you’ve started and measure success.

Remember that your users are real people with real businesses

Desiree spoke about the importance of remembering that improving your Customer Success strategies are really helping real businesses. “Even though we call them users, at the other end of the computer these are people who are trying...it’s their livelihood”. Great advice Desiree! Design your customer success strategies for the people behind the businesses.

Ready to add online
courses to your customer
success strategy?

Explore Thinkific Plus today!

www.thinkific.com/plus

