

How an international project management SaaS reduced its support tickets by 25% 💪



With Product Fruits' onboarding elements, we managed to reduce the volume of support tickets by 25% and reallocate our support team to implementation workshops for new customers.

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Product Owner,  NODES & LINKS



25% reduction in support tickets

24/7 self-service support available



Challenges

- Manual handling of onboarding questions
- Non – streamlined way to communicate new updates
- Lack of automation in teaching the value of the platform



Solution

Nodes & Links developed three self-help flows (layers) to guide new users through the platform. The onboarding flows were done with the following Product Fruits features:



Tours



Knowledge base



Adoption meter (feedback widget)



Hints



In-app announcements



Feedback center



1ST ONBOARDING FLOW (TEMPORARY LAYER)

offers a process of learning the platform through:

Welcome tour: Shares a breakdown menu with a list of platform sections/features

Feature tours: Guide users through each platform section/feature using highlighted elements

Segmentation: Enables tours to be displayed only once to each unique user or be displayed to specific user segments

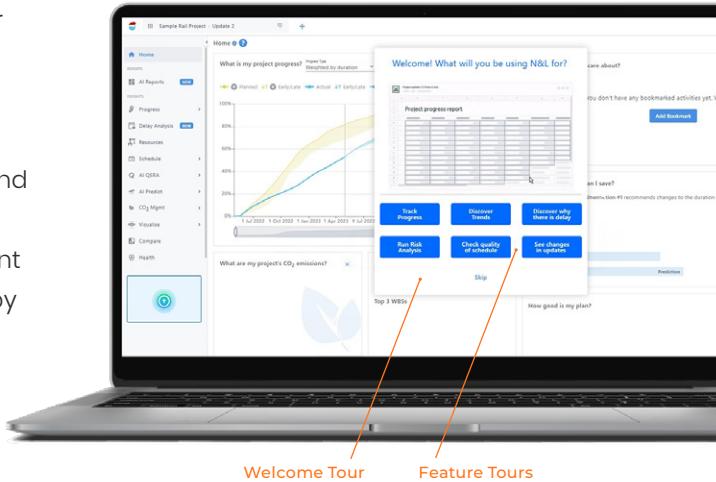
How it works:

Nodes & Links platform helps their clients with all phases of their project management, ensuring timely and successful project delivery (i.e. tracking project progress or delay, analysis, etc.).

Their first flow is the Welcome tour. It's displayed to new users and offers a breakdown menu with an overview of all platform features/sections. They cover all important project management phases. Their users can choose how to work with the platform by choosing relevant feature tour:

- Track progress
- Discover Trends
- Discover reason of delay
- Run risk analysis
- Check quality of schedule
- See changes in updates

Users are guided through the platform sections via feature tours that use highlighted elements.



Product Fruits tip: As an alternative to the breakdown menu in the welcome tour, consider using a checklist widget where the user can launch respective "section" tours.

2ND ONBOARDING LAYER

is dedicated to user's permanent support within each platform section through:

Toolips (Hints): Offer users the option to re-trigger feature tours and to access an article or tutorial in the help center (knowledge base)

Tours: Instruct users how to work with each section (through feature/section tours) or introducing them to the respective section of the platform (with one tour card)

Adoption Meter: Collects feedback from users in real-time

Help Center (Knowledge Base): Offers users wider knowledge through articles, tutorials, and best practices

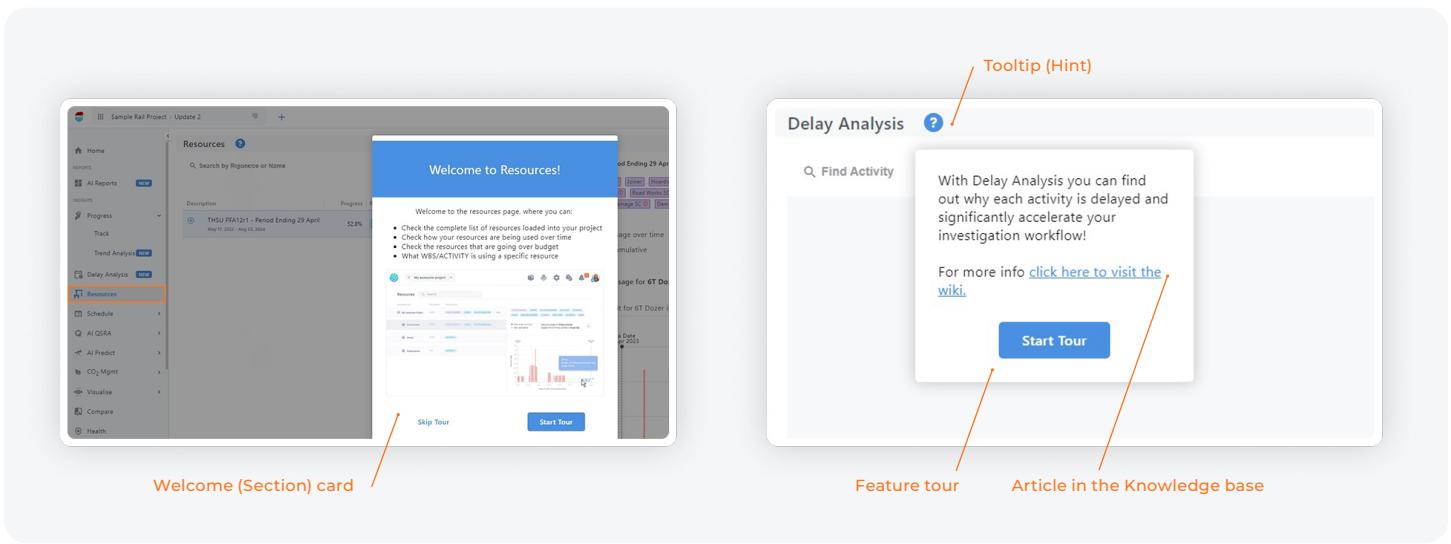
Feedback center: Collects feedback from users in real-time



How it works:

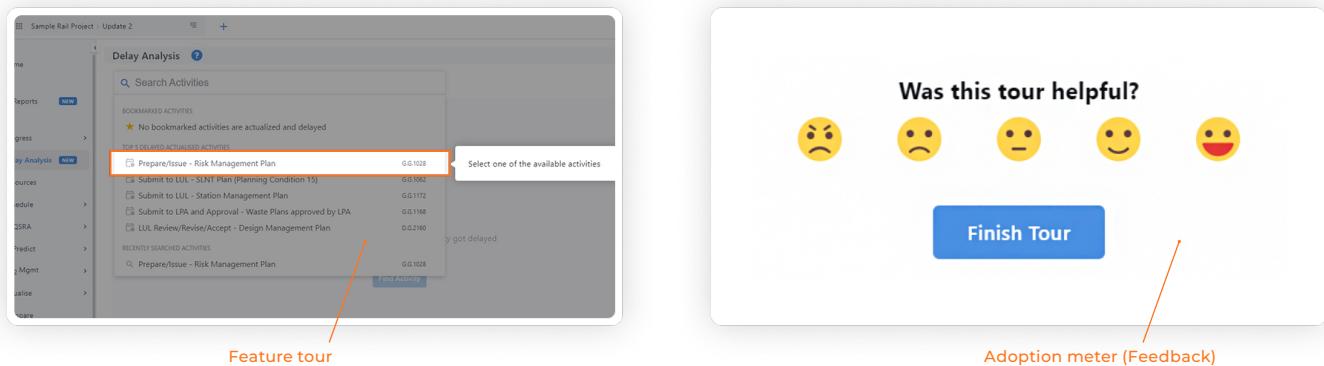
Once the main welcome tour, accompanied by the breakdown menu is completed, users can access help and learning content through a combination of onboarding elements that are constantly present in each section: Section Welcome Card, Tooltip (Hint), Feature Tour, and a Link to the Help Center (Knowledge Base).

Each platform section has a "welcome" card explaining the purpose of the section. The Nodes & Links product team has integrated a tooltip (hint) with a brief feature tour into each section. As a "learning" alternative to the feature tour, each tooltip (hint) also offers a link to relevant article in the Help Center (Knowledge base).



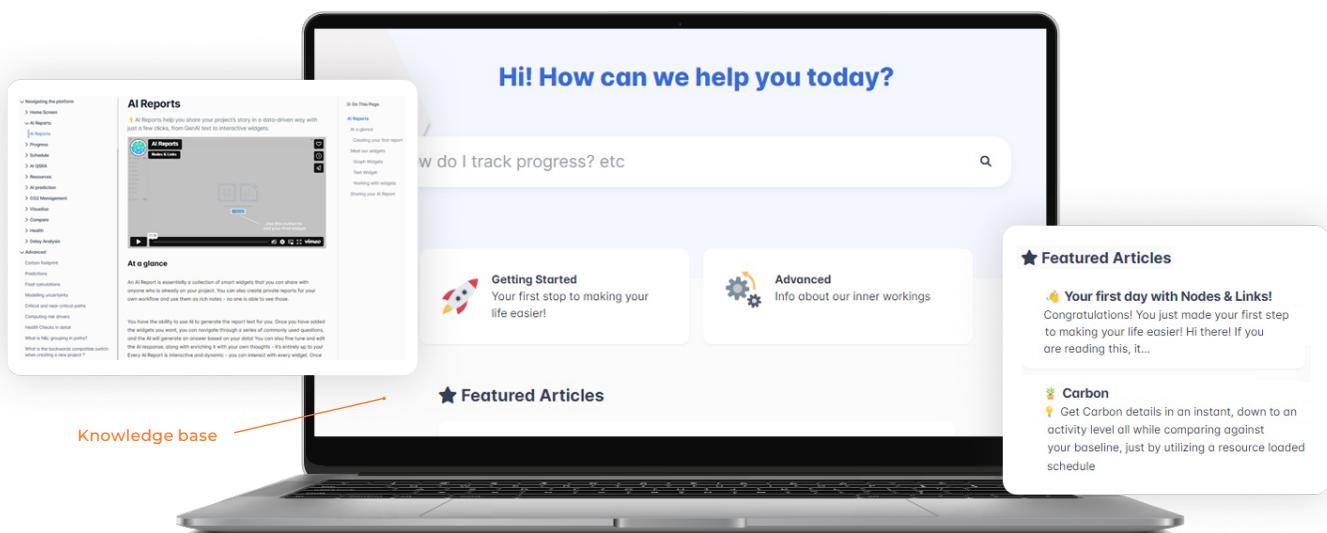
At the end of each section/feature tour, users encounter an adoption meter widget soliciting feedback.

Based on user input, the team has already fine-tuned the flow and enhanced the content of several tours.



Feature (section) tour uses highlighted elements to navigate the user through the section.

The Help Center (Knowledge base) is full of tutorials and articles. It can be accessed by users from any hint (question mark) in the platform to reach more detailed information.



Product Fruits tip: To strengthen the support presence in the platform, we also recommend placing knowledge base articles in the Life Ring Button widget, which serves as a "container" or a single point of contact for all important information (chat widget, tutorials, tours, knowledge base articles, etc.).

3RD ONBOARDING LAYER

communicates important changes and news in the platform through:

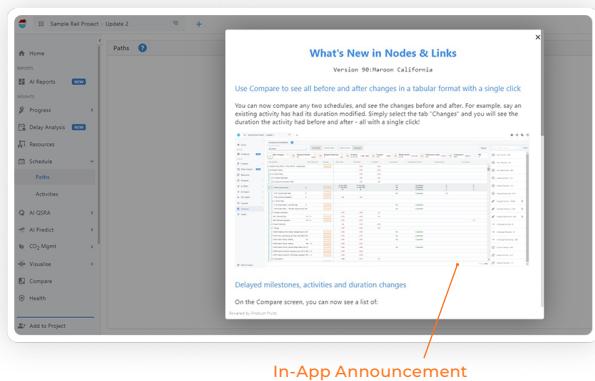
In-App Announcements:

Modal cards communicate new features and other important changes

Tour cards: Each new section offers users an introduction into the section with launch of feature/section tour

How it works:

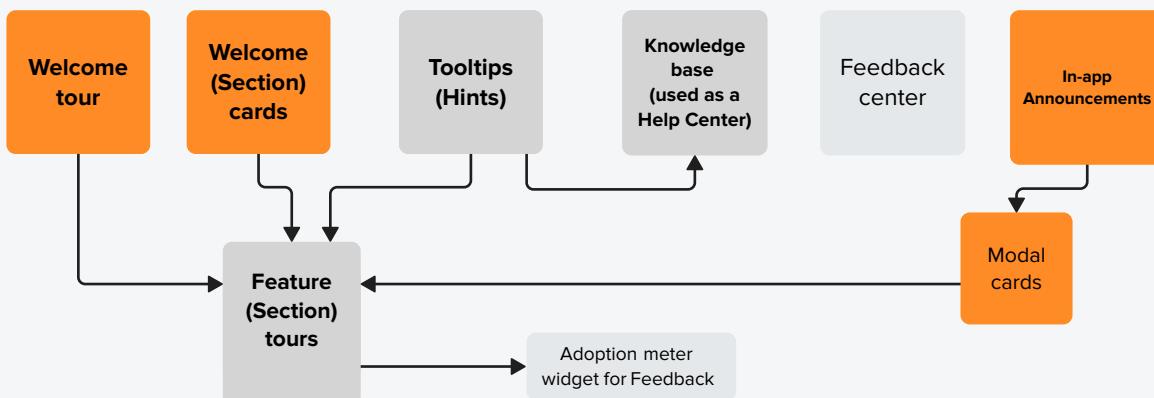
Announcements are used for all crucial updates in the platform. The Nodes & Links team uses modal in-app banners that cover the entire screen to capture user attention.



Announcements are displayed through segmentation, specifically to users who have already logged into the platform for the second time and beyond. This is done to avoid any conflicts with the first onboarding layer, the welcome tour.

The announcements offer users the option to trigger the feature tour, guiding them through the communicated change. Each new section also has a tour card introducing to the users the purpose of the section – triggered for every new user only once.

Nodes & Links onboarding flow chart



About  NODES & LINKS

Nodes & Links is a technology company that works with global leaders in the project delivery space, from energy and construction to aerospace and defense. Our platform uses peer-reviewed technology and award-winning AI to help teams access critical project knowledge fast and easy. As a result, projects are delivered faster, more sustainably, and at less cost. Nodes & Links are backed by world-leading investors and innovate with leading universities.

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