# In-App Messaging For Product Teams: Types, Best Practices, And Real-Life Examples

Your users discover your product because they're looking to solve a particular problem that matters to them. But discovery is only the first part of the puzzle. The long-term success of any SaaS product depends on offering a great experience to the customer every time they interact with it.
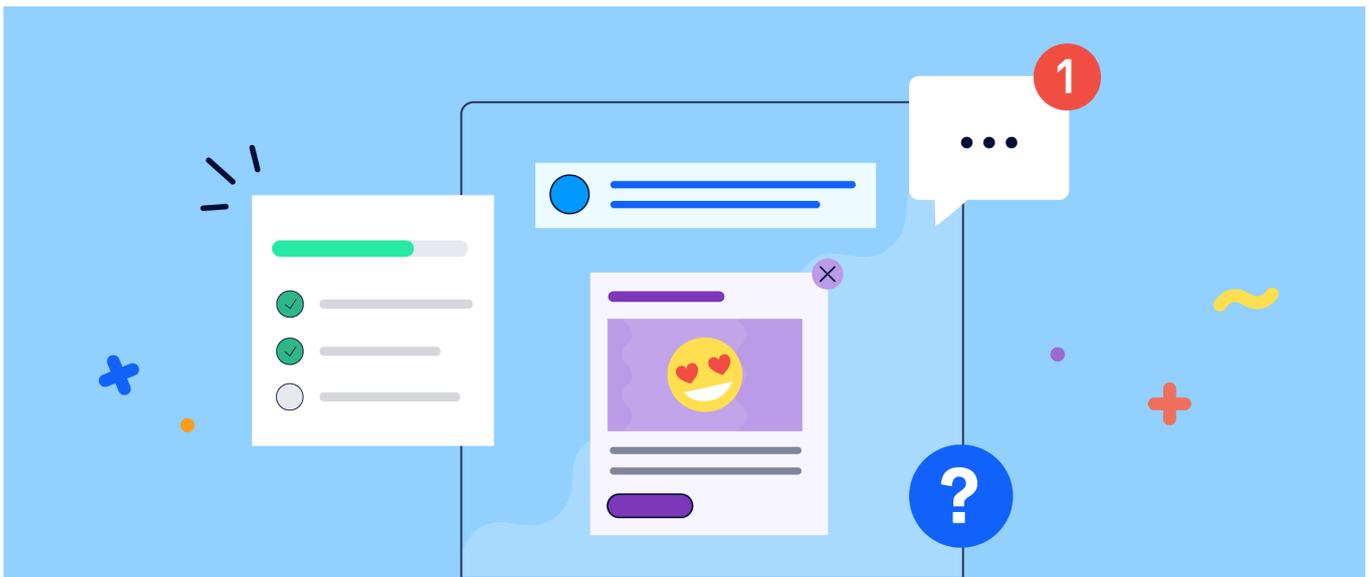
In-app messages are the different elements that product teams use to reach, inform, and educate users within a product. They help users experience the product's potential from directly in the product, and it plays a crucial role in determining how soon users see value.

Table of Contents

This brings us to a problem we're all trying to solve – how can we keep users engaged and informed in a way that is valuable but not intrusive, educational but also entertaining?

In this article, we'll explore in-app messaging and how it impacts users throughout their product discovery journey. At every stage, we'll draw inspiration from products that do this well and understand what makes them click. Lastly, we'll look at some best practices and tips to follow while implementing your own in-app messaging strategy.

What is In-App Messaging and Why Does it Matter?

According to recent research, the average person has 40 apps installed on their phone. Out of that 40 apps, 89% of the screen time is split between 18 apps and more than a half of these apps go unused.

Each user's needs and experiences are unique and this impacts how they consume information as well. Offering simple, contextual in-app messages to users while they get to know your product is an easy, intuitive way of delivering value to your users without interrupting their experience. From onboarding new users, to customer retention and engagement, these small nudges play a crucial role in improving the stickiness of your product.

As we dive deeper into the world of in-app messaging, let's start by looking at some benefits that illustrate why in-app messaging deserves a seat in your broader customer education strategy. We've broken down these benefits into two categories: the immediate benefits that are experienced by the user and the compounding benefits that add value to the product team over time.

Benefits of In-App Messaging

You know your product better than anyone else, which can sometimes influence your understanding of how easy or difficult it is for new users to understand it. You also can't be there to handhold each new customer through their first few interactions with your product.

So what are your options?

Encourage success from the get-go

Your product onboarding experience is a good starting point to win over new users. But the way you choose to design this initial experience is just as important as the vehicle you use to execute it. Product tours and onboarding walkthroughs are great to give new users a glimpse into the benefits of your product.

3-step tours have the highest completion rate at 72% as per the latest Benchmark Report published by Chameleon which analyzed millions of user interactions to determine the 'ideal' product tour.

72%

3-Step Tours
Completion Rate
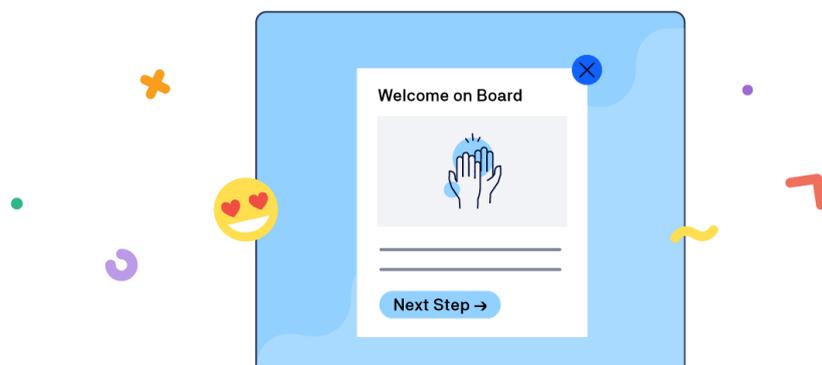
Shorten the distance between signing up and deriving value

Good in-app messaging involves a little bit of everything. It requires great copy combined with a simple, fuss-free design. It needs to be educational, but it also leaves enough room for self-paced discovery. All these elements come together to reach the same goal – guide users towards their 'aha moment' so they see value in your product in the quickest, best possible way.
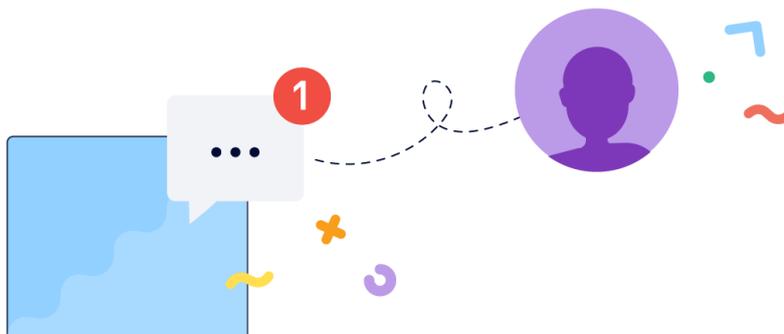
Every new release or feature enhancement is an opportunity for you to show your users that they are heard and their needs matter to you. This is why it's important to communicate these improvements because let's face it – you can't use what you don't know.

While marketing campaigns and external communication channels are great to announce new features and improvements, this is where in-app notifications and announcement banners can help in getting the feature in front of the user's eyes in the context of the product while they're using it.

Users easily find help when and where they need it

In an ideal world, all products would be easy enough to use without any guidance, but the reality is that products can get complex. You need to provide all the information needed to your users so they can use your products well.
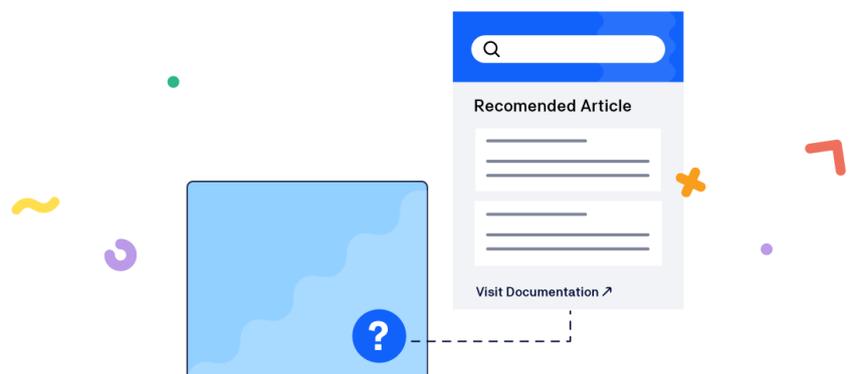
Context-sensitive help, where users click a help button to access related help content directly from the product, is a great way to guide users as and when they need assistance. This way they can continue to read about a specific situation or feature without losing context or feeling stuck.

Users don't raise support tickets unless they need human intervention

The great part about building an in-app communication strategy that is built around the needs of the customer is that it pays back (who would have thought)! These benefits can eventually impact the product team as well since keeping users informed about improvements and product changes can also reduce customer tickets over time.

This ensures that users are aware of product updates, new features, and even outages so these issues are easily resolved with minimal human intervention. Of course, it should be easy for users to reach additional support when and if the need arises.

Your product roadmap is a true reflection of user needs

Your active users are your biggest advocates but they can also be your harshest critics. And you'd be surprised to see how willing your active, engaged users are to give feedback if you make it easier for them to do so.
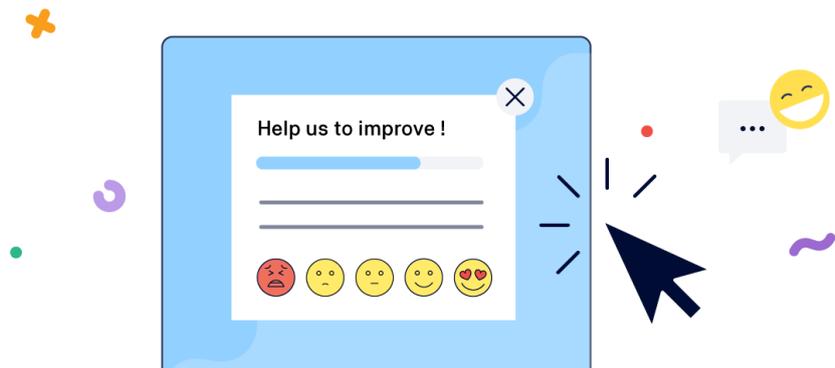
Leveraging in-app messaging, surveys, polls, or other communication channels can help product teams collect real-time feedback and data on how users are interacting with their products. This in turn lets you create more user-centric products and drive long-term growth and success.

In-App Messaging Versus Push Notifications

One thing to remember at this stage is that in-app notifications or messages are not the same as push notifications (and unfortunately these two terms do get used interchangeably 🥷). But the two couldn't be more different from each other!
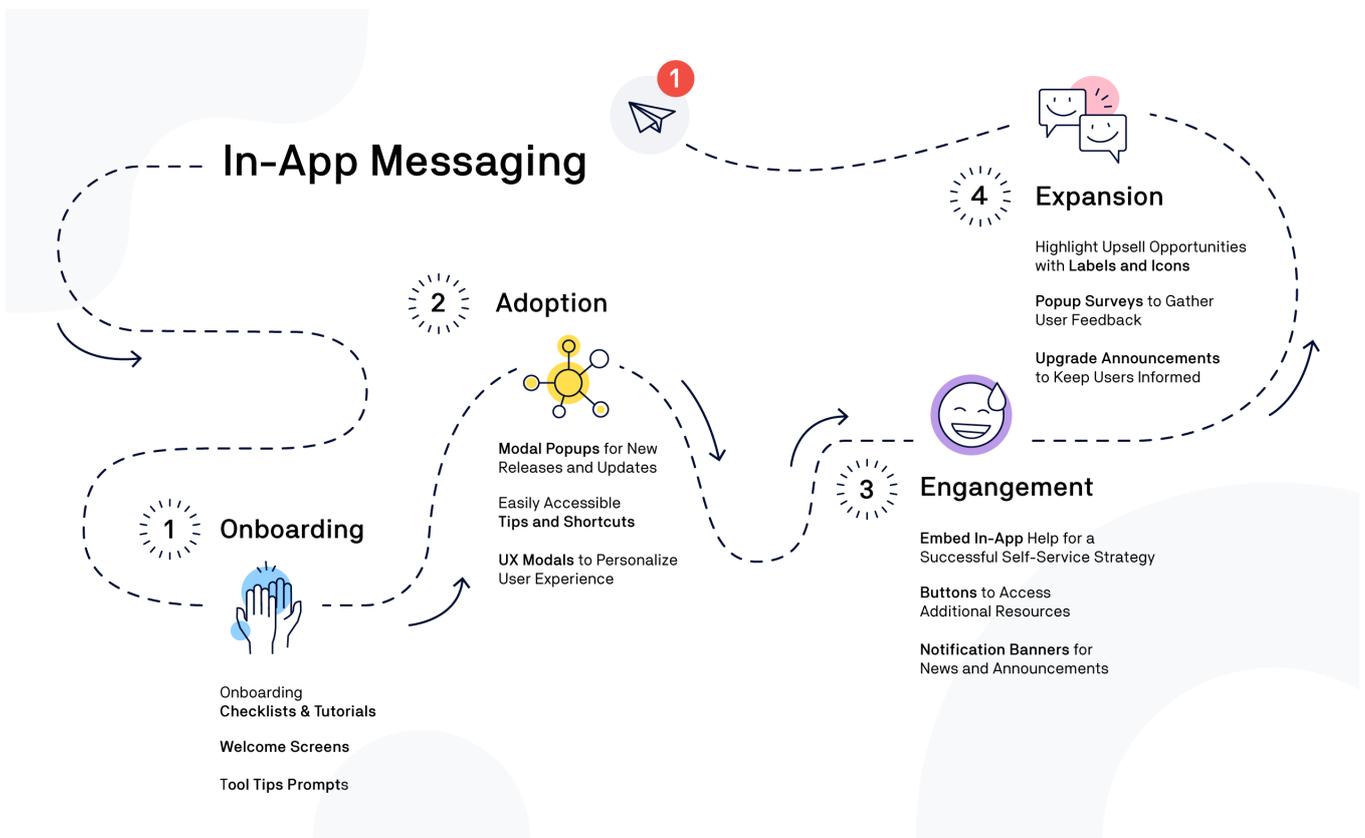
Both in-app messaging and push notifications are valuable communication tools but their use cases and impact on the user experience differ considerably. The choice between the two depends on the specific goals, content, and timing of the message, as well as the desired user engagement and experience.

How They Differ	In-App Messages	Push Notifications
Delivery	Displayed within the application interface	Delivered to a user's device, even when the app is not actively in use
Timing	Typically triggered when a user is actively using the application	Can be sent at any time
User Experience	Non-intrusive, users may or may not be able to opt-out	Users can opt-out
Attention and Engagement	Appear when the user is actively engaged with the app	Rely on passive users to take action based on the notification's content
Purpose	Onboarding, feature announcements, user support, or targeted promotions	Re-engage users, deliver time-sensitive information, or provide updates and reminders

How In-App Messaging Can Boost Engagement Throughout the User Journey

Now that the basics of in-app messaging are out of the way and we're convinced about its importance (did we even doubt it, really?) let's dive into some of the ways you can incorporate in-app messaging throughout the user journey.

The content and impact of in-app messaging are best understood in the context of its usage. As a customer, there are places where you appreciate a nudge or hint in the right direction but there are also situations where you'd much rather be left alone.

In-App Messaging

4 Expansion

Highlight Upsell Opportunities with **Labels and Icons**

Popup Surveys to Gather User Feedback

Upgrade Announcements to Keep Users Informed

2 Adoption

Modal Popups for New Releases and Updates

Easily Accessible **Tips and Shortcuts**

UX Modals to Personalize User Experience

3 Engangement

Embed In-App Help for a Successful Self-Service Strategy

Buttons to Access Additional Resources

Notification Banners for News and Announcements

1 Onboarding

Onboarding **Checklists & Tutorials**

Welcome Screens

Tool Tips Prompts

Let's take a look at the elements of in-app messaging that add value in each stage of the user's journey. In each stage, we'll look at different types of in-app messaging and see a few examples of products that it them well.

Stage 1: Onboarding

Picture this: you're a new customer who's excited to dive into a brand-new product or service. But as you navigate through its somewhat unfamiliar territory, confusion starts to creep in. You then get frustrated and decide to come back when you have time. Except, you never do.

74%

Switch to
Other Solutions
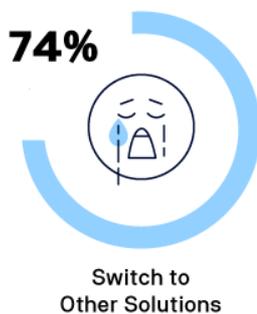
The initial interactions with a product play a major role in deciding whether you'll use it again, or even consider paying for it in the future. 63% of users think onboarding is a key factor in deciding whether to subscribe to a product or not. What's worse is that 74% of potential customers will switch to other solutions if the onboarding process is too complicated.

We've said it before and we'll say it again – your users are just like you! If you want them to stay, show them how your product can solve their problems and they'll stick around.

Onboarding Checklists and Tutorials

Onboarding checklists and tutorials are invaluable to new users. They simplify the process of getting started with a product or service by providing step-by-step instructions, highlighting key features, and addressing common questions that can be easily handled without human intervention.

It's like having a product tour guide hold your hand and lead you through the initial steps of your journey. Teams using the Jobs to Be Done framework can use this to highlight the major jobs they think users want to do in their product. It simplifies the experience by breaking down the learning process into manageable chunks and providing clear instructions so that users can easily decide whether the product works for them.

One of the things to always remember with onboarding checklists is to determine how much information is too much information. We'd say the sweet spot is to create checklists with no more than four steps so the experience is empowering without being overwhelming.

This getting started checklist is a great example of an onboarding tutorial that presents a short list of goals or activities a new user can use to discover Grammarly's potential. Each step in the checklist includes additional features to go deeper, but this overview offers a good starting point to assess if this is the right tool for you.
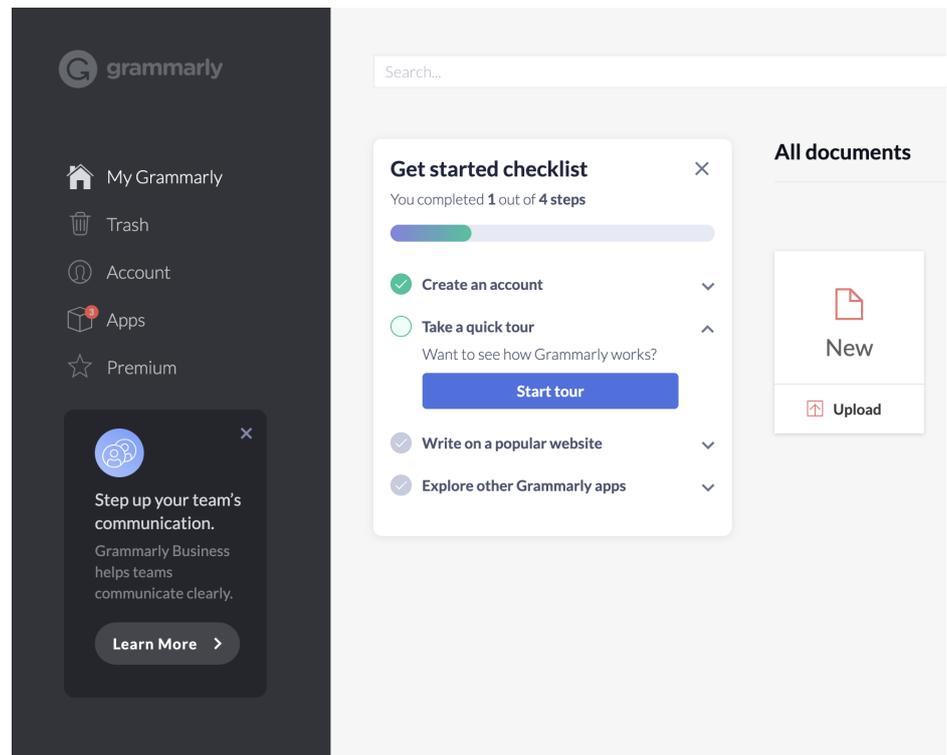
1 Grammarly's onboarding process includes a sweet 4-step checklist

Personalized Welcome Screens

A personalized welcome screen is one of the simplest ways to make a connection with a new user. It also allows you to collect additional information from the user that can help design the perfect initial experience tailored to their unique needs.
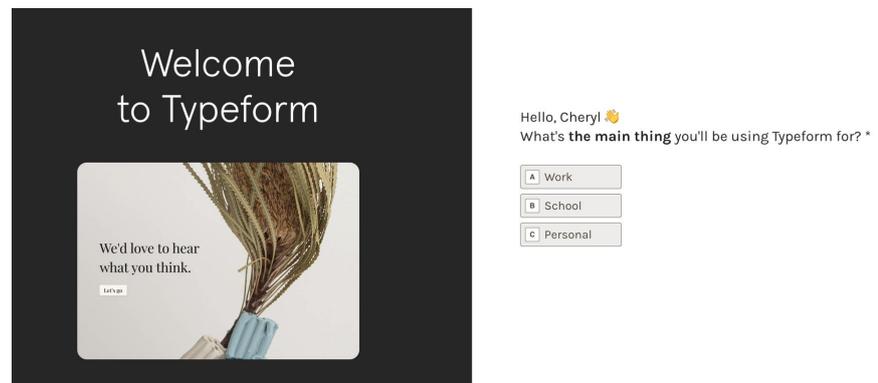

2 Typeform includes personalized welcome screens to bring new users onboard

This welcome screen in Typeform smartly uses the product to illustrate its potential to a new user. One of the first things you do is answer this short Typeform that not only acts as a window into the product, but also helps to personalize the user's journey in the future. Talk about diving right in!

Tool Tips and Prompts

Another good practice is to sprinkle easy tips and suggestions for new users as they explore your product. Think of these tips as the little reminders or prompts that can help, especially when you start a new habit. Even the simplest product has a learning curve and these tips can go a long way in increasing the stickiness of a product as new users find their way around it.
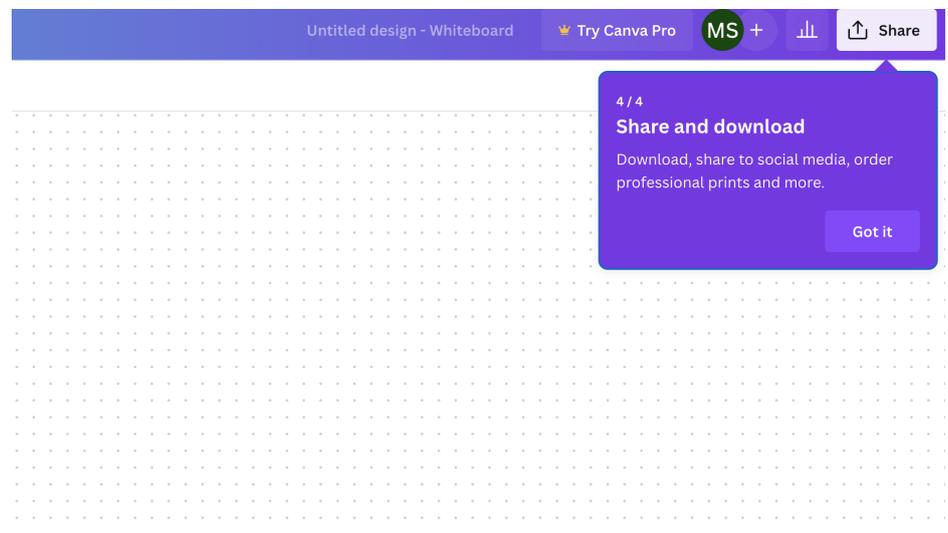
3 Practical and useful tooltips are a core part of Canva's new user experience

This simple series of prompts, that appear as you start designing with Canva is a great example of providing practical advice in a non-intrusive way.

Stage 2: Adoption

Product adoption is one of the leading indicators of success for a SaaS business. Ensuring that your product is simple and easy to understand is a big factor in increasing product adoption.

Convincing users to try your product is great but the real test of retention lies in ensuring they keep coming back and continuously find value in your product.

Modal Popups for New Releases and Updates

You work hard to deliver new features and improvements to your products, but are you certain that your users are aware of these updates?

This is a genuine problem that concerns the best product teams around the world. o much so that we recently published an extensive article offering tips and practical advice on writing more effective release notes where we illustrate these challenges and how we solved them.

But that's only one part of the problem. Your beautifully-written release notes will stay hidden if your users don't get the opportunity to discover them. In-app messaging lets you draw attention to enhancements and new releases as and when they happen.
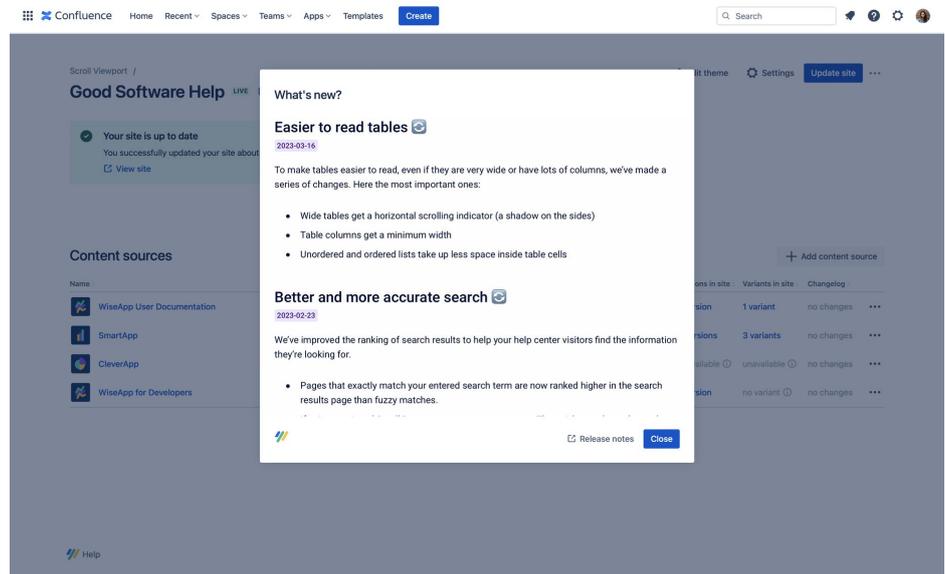
4 Scroll Viewport's 'What's New' dialog box informs users about interesting updates and releases

Scroll Viewport is part of Scroll for Confluence, a collection of Confluence apps that let you manage and publish your team's content and documentation.

Including a 'What's New' dialog box that opens up a small summary of new improvements and updates is a great way to share changes with users without interfering with the user experience. It also gives interested users a way to easily access the release notes to better understand the feature if they need to do so.
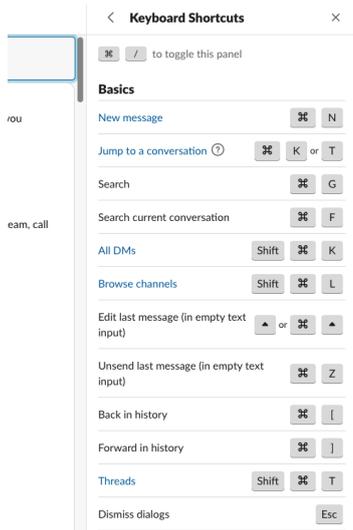
5 Easily accessible keyboard shortcuts in Slack

Easily Accessible Tips and Shortcuts

We all learn differently and while there are a set of features you should know right at the start of using a product, there are others that you learn over time.

Irrespective of their pace or how users choose to learn, it is important to make it as easy as possible to access useful tips and advice whenever they need it right, from within the product.

Slack's help menu has a host of options to inform both new and power users. This nifty toolkit of keyboard shortcuts is a nod to their motto of maximizing productivity. It ensures users don't spend too much time trying to navigate around the product and instead spend their time doing what they're meant to do – effectively communicating with others in their team.

But if you want to become a power user and pick up some additional skills, you don't have to venture too far to find them!

UX Modals to Personalize User Experience

Your users will only use your product if it's easy to understand and convenient to use. But this means different things to different people and that's where a personalized in-app experience – right down to its unique usage – can improve product stickiness.

Incorporating short in-app messages and prompts to understand user intent and behavior lets you tailor the experience to suit each user. This ensures that each user experiences your product to its fullest potential and increases the chances of adoption.
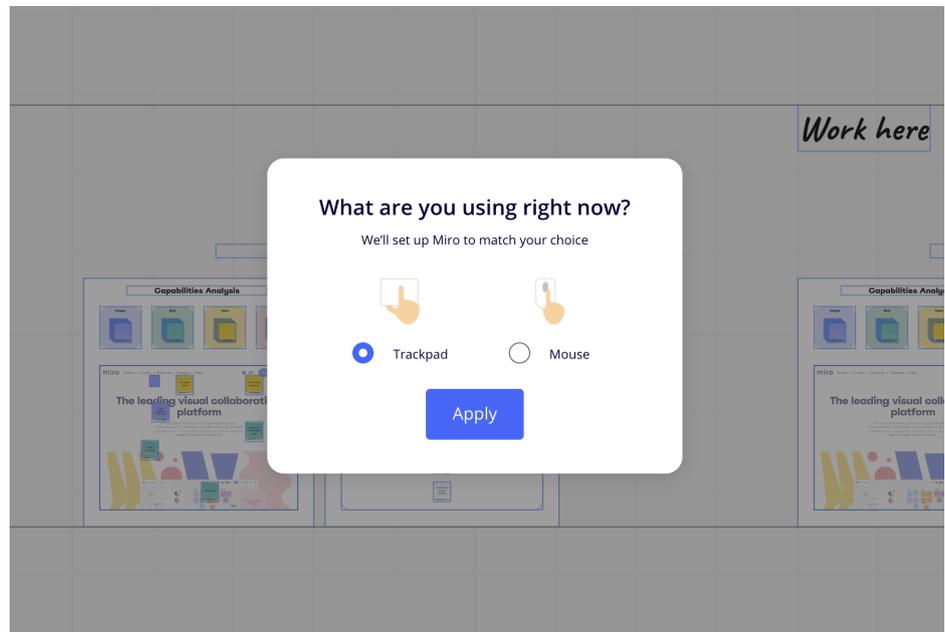
6 Miro collects inputs right at the start to further personalize the user's onboarding journey

This simple dialog box that pops up almost immediately after sign-up is designed to personalize the in-app prompts and make them more useful. Not only does this level of personalization make the user feel seen and heard, it ensures that the suggestions and tips are relevant to each user.

Stage 3: Engagement

According to the Harvard Business Review, acquiring a new customer can cost 5X more than engaging an existing customer.

Optimizing and maintaining product use to engage, convert and retain users over time is one of the biggest challenges faced by SaaS products today. The problem isn't that there aren't enough products that solve relevant user problems – it's that there are too many. A study by Statista suggests that the number of mobile app downloads worldwide has consistently been on the rise since 2016, and reached a whopping 255 billion in 2022.

The statistics get even crazier in the business context: reports suggest that an employee uses eight SaaS applications. Companies with 50 or under employees have about 40 applications in total, while those with 1000+ employees have over 200.

So how can your product stay relevant enough to break through the clutter and users coming back?

It's not good enough to provide help and guidance at the start of a user's journey but to keep reminding them about how the product adds value to them. In-app communication plays a major role in guiding users towards features they're likely to use so a product becomes more sticky over time.

> It doesn't necessarily need to be a 'What's New' dialog box. For instance, Atlassian provides modals within Confluence that allow users to discover keyboard shortcuts, tutorials, feedback, and more. We find the keyboard shortcuts to be particularly helpful at K15t as they help us work faster with Confluence, and this is something we share with every new colleague.

Embed In-App Help for a Successful Self-Service Strategy

Context-sensitive help lets users jump straight to the relevant piece of help content in the documentation by clicking on specific touch points within the software. But embedding in-app help within your product lets you improve that experience even further.

With in-app help, users get the help they need without losing any context. Since the help information they need is presented to them, it encourages users to stay within the product, understand how they can fix the issue they're facing, and solve it right away without taking them outside the product and into the product documentation.

In short: instead of taking your users to the solution, you bring the solution to them.
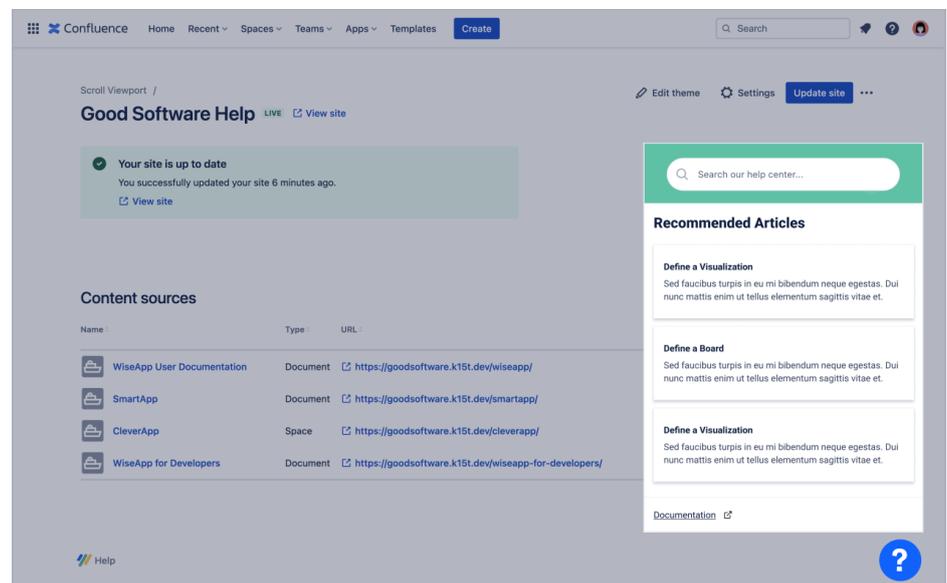

7 Scroll Viewport's in-app help feature makes it easier to offer guidance within the app

Buttons to Access Additional Resources

Elevating the stickiness and memorability of your product depends on its seamless usability, where users effortlessly perceive its value without the need to actively seek it. Useful information should always be available and easy to access when it's needed, without interrupting the experience of using the product.

Sounds complicated? It isn't, really.
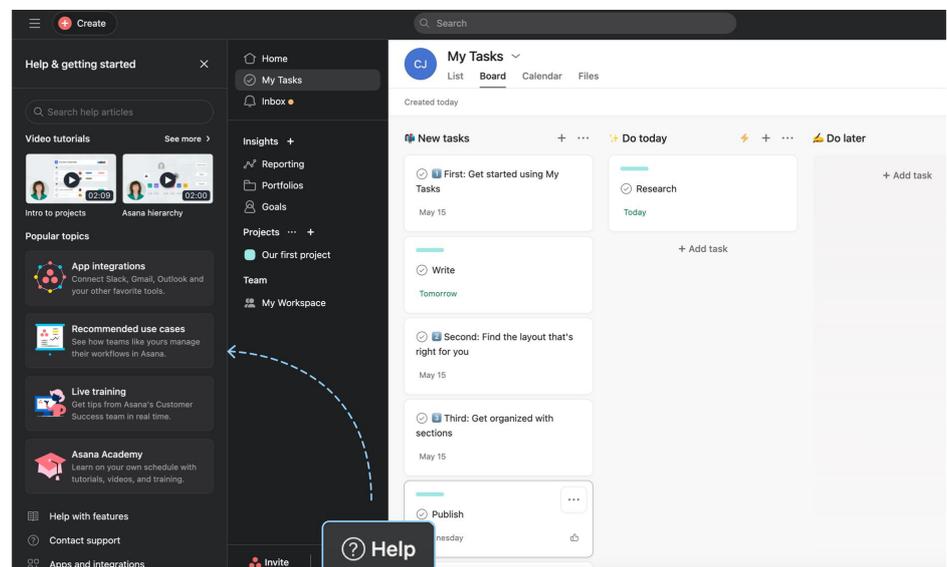
8 A simple help button opens up a world of useful content in Asana

This useful but non-intrusive experience is illustrated beautifully in Asana where a subtle icon near the bottom of the screen opens up a window of helpful resources and advice in a variety of formats so the user can choose what makes sense to them. It lets users access video tutorials, browse through popular topics, and even contact support.

Another excellent example is Atlassian Confluence. Within Confluence, the help button conveniently consolidates all in-app messages into a single sidebar. Here, users can access context-sensitive articles, the community, keyboard shortcuts, and more. Moreover, third-party app vendors, like us, can also utilize this sidebar to provide helpful links for their respective apps.

Notification Banners for News and Announcements

Banner announcements are prominent, visually appealing notifications that appear at the top or bottom of the user interface to communicate important messages or updates to the users.

Irrespective of their placement, banners designed to catch the user's attention, so you need to be extra careful while using them. A good practice is to consciously use banners only when needed instead of including every tiny update in a banner and increasing clutter.
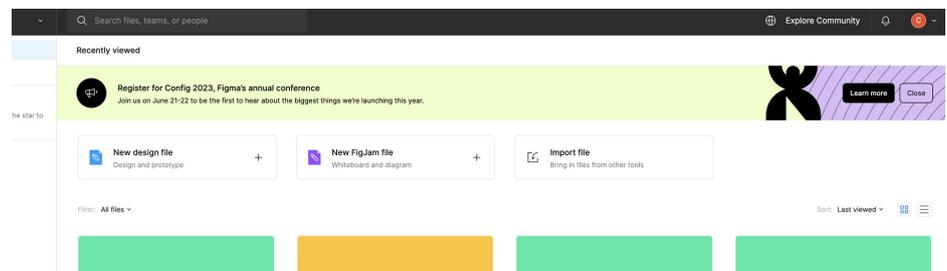
9 This banner in Figma is designed to inform without distracting the user

Some possible use cases for banner announcements include major product updates, upcoming events like webinars or training sessions, and even important downtime and maintenance alerts.

Stage 4: Expansion

Once your users are convinced about how your product adds value to their work or personal lives, it opens up a whole new world of possibilities. It becomes easier to introduce them to additional use cases or benefits that they hadn't envisioned at the beginning.

This makes it the ideal stage to introduce in-app messages that go one step further than education. Upsell opportunities or information about premium features that appear in the context of usage are a great way of presenting users with solutions even before they actively go looking for them.

Highlight Upsell Opportunities with Labels and Icons

The ideal time to recommend an upgrade or upsell to users is after they've seen value in your product. But always remember that the goal isn't to force users to purchase things they don't need, but to surface additional use cases or features that can increase the value they derive from your product over time.

Including labels and icons are a great way of hinting at upsell opportunities without making it intrusive or too 'in your face'. This ensures that users can experience the product without disrupting their flow but also lets them explore additional paid features within the context of the product if they choose to do so.
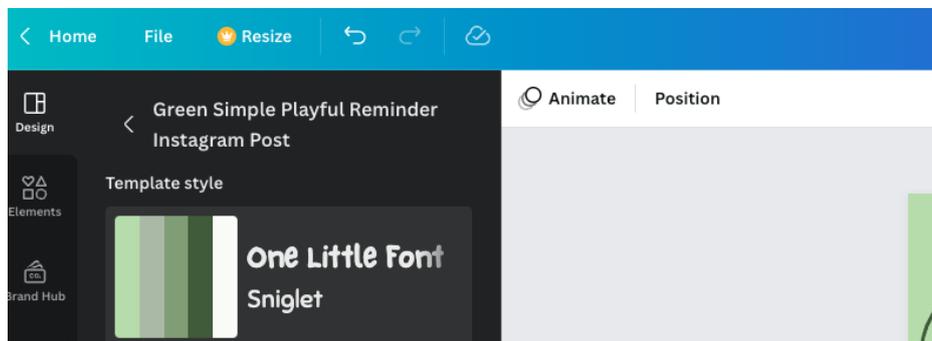
10 Canva uses icons to subtly call out premium and free features

At no point should these subtle cues and messages interfere with the user experience. Similarly, consistent use of icons to convey a message goes a long way in ensuring users understand the difference between free and premium features without leaving the product's interface.

Popup Surveys to Gather User Feedback

Engaged users are not only more likely to provide valuable feedback that enhances your product, but they also contribute to shaping a user-centric product roadmap that aligns with their needs.

In-app messaging isn't solely about offering useful information to your users. You can also use it to listen to what your users want to tell you. You can reach users that have a first-hand experience with your product and are convinced about its potential. You'd be surprised how willing users are, especially the highly engaged, to give feedback when they have an easy way to do so.

A good tip is sprinkling micro-surveys in key points of the user experience journey. It prevents the user from feeling the fatigue of answering a long survey and lets you gather feedback in real time.
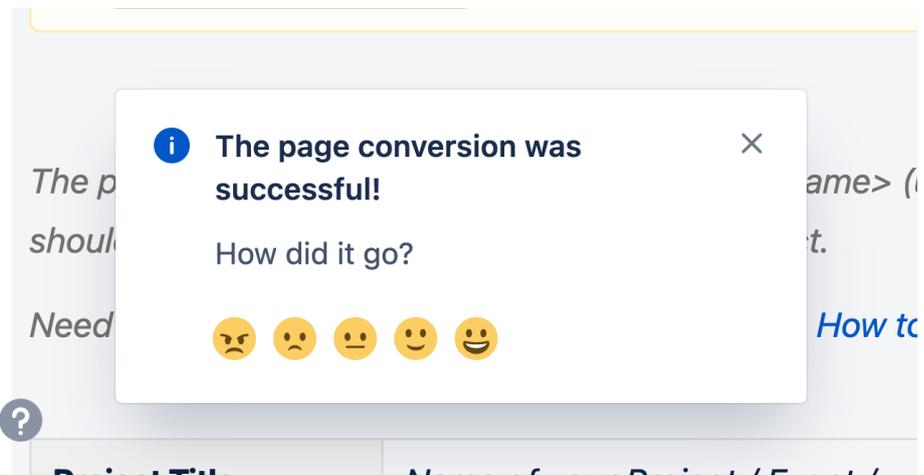
11 This pop-up in Confluence is a quick and uncomplicated way of gathering feedback

Upgrade Announcements to Keep Users Informed

When your users first discover your product, it's very likely that they're looking for something specific and want to know if you can meet that need. But sticking on to become long-term users and brand advocates depends on consistently seeing the value in your product and being able to trust your brand.

Using notifications and reminder messages in the product UI ensures that users are aware of its benefits and implications. Users can still decide whether or not to upgrade but have all they need to make an informed decision.
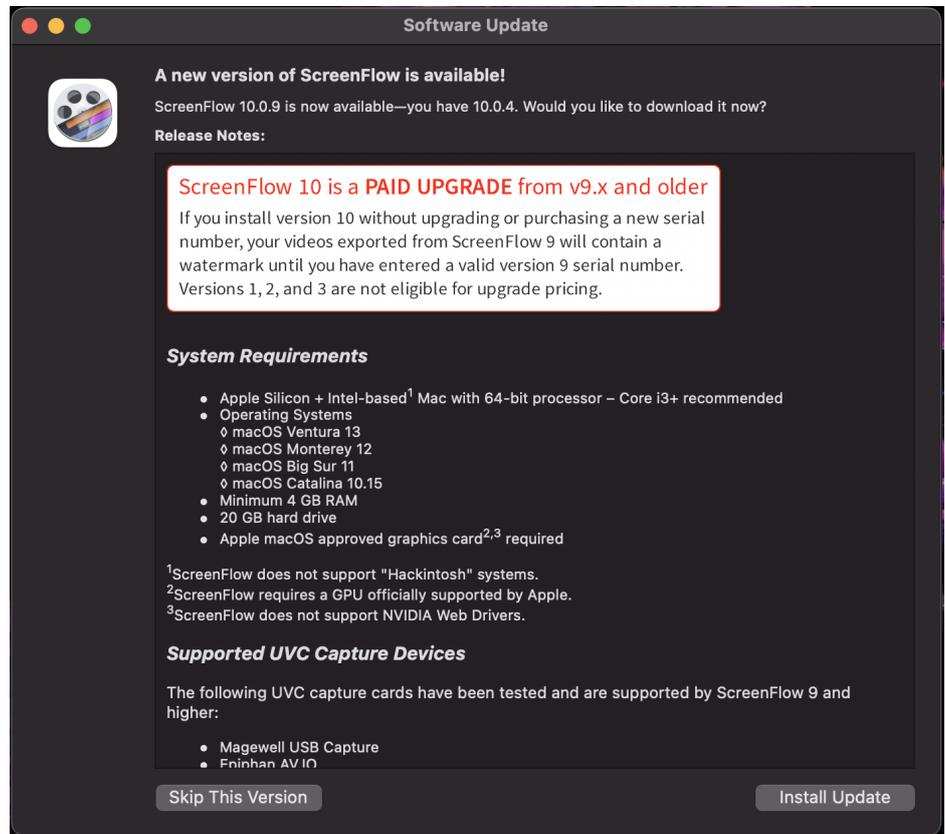
12 This in-app message in ScreenFlow is a transparent way of highlighting a paid upgrade

Bonus: Best Practices for Effective In-App Messaging

Now that we've (hopefully) convinced you about the benefits of in-app messaging and how it can be used to educate and inform users throughout their journey, let's look at some best practices and tips to keep in mind while crafting these messages.

Segment Your User Base
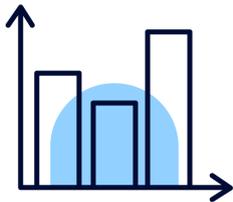
Different types of communication make sense to different users. Use existing data to understand the stages in which users would benefit from a certain type of content and determine the places where in-app messages can add value.

Gathering this usage data over time will also unearth insights that can help fine-tune your in-app messaging strategy. But as a starting point – always tailor your messages to user segments based on what matters most to them (and never the other way around!).

KISS: Keep it Short and Simple
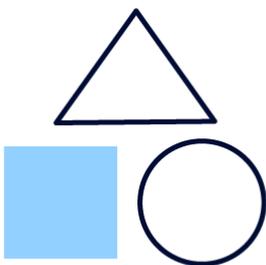
This one's a golden rule for any type of product communication. Irrespective of how many things you'd like to highlight to your users, remember that we all have a limited attention span – so use it wisely!

Your user interacts with your product to fulfil a particular goal or to solve a problem. Make sure you only offer content that will help them achieve that purpose. No more, no less.

Always Have a Goal in Mind
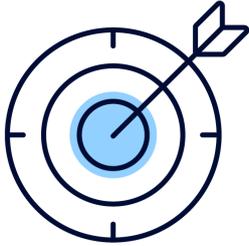
Having a clear goal can help you design your in-app communication strategy and craft direct and compelling messages. Whether you're trying to guide new users through their onboarding, encourage them to upgrade, or nudge them towards new features, make it easy for users to reach the end goal with minimal clicks.

Review Messages Regularly and Screen for Relevance

Finally, one of the most important things to do is to constantly review your in-app messages and ensure that they're up to date. There's nothing worse than an outdated tooltip or unnecessary banner notification. Ensure you're aware of all the possible communication flows across user segments and regularly screen them for relevance.

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