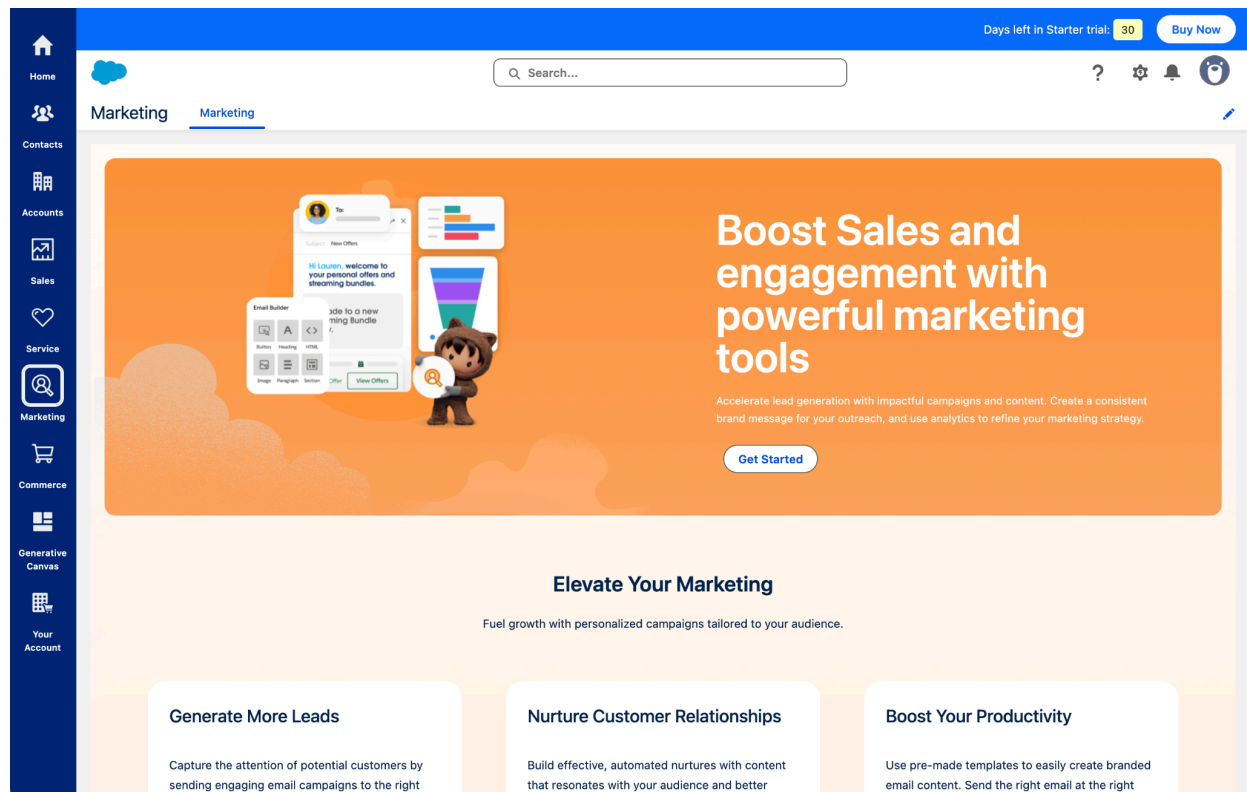




Improving Conversions for the "Salesforce Starter - Marketing" 30-Day Free Trial

Hey everyone, welcome to the team! Your ability and opinions are important to us. Usually, we'd ease you into things, but the team and I ran into a challenge that needs to be addressed now: our [Salesforce Starter - Marketing and their 30-day trial experience](#). This is where new customers from smaller businesses get a taste of what Salesforce Marketing Cloud can offer. I know this is your first project with us, but it's an important one to get right so we leave them with a great first impression.



The problem: Starter isn't getting quite the traction we hoped it would. People are signing up for the 30-day trial but they aren't converting to paid customers after the trial ends. Our research is showing us that some of the foundational experience needs improvement, but the way our platform works, our engineers aren't able to address these issues for 8-12 months. I'm happy to explain more about why this is the case later; just ask me in our Slack. What we do have is a small but capable engineering team that can add things like tool-tips and other elements of guidance to provide direction in spite of deeper usability challenges we'll fix later. The engineers need your design insights to begin coding.

Most importantly: You need to improve the "onboarding" or "first time user experience" for a 30-day free trial of Salesforce Starter - Marketing, a product specifically designed for small to medium-sized businesses (SMBs). We need to increase the conversion rate from free trial users to paid subscribers by helping them to understand how the experience works and the value it provides. Said another way: by the time a trial user's 30-days is over we need to ensure they are willing to pull out their credit card and purchase a \$25/mo license so they use it regularly for all their marketing automation needs.

Here's the issue though: Due to engineering complexities and costs, the underlying foundation of the existing free trial experience **cannot** be changed. If you see a usability issue in the experience, you cannot fix it. Instead you can help the user work around it. Your focus will be on designing better way-finding and guidance that sits *on top* of the existing structure. Think creatively about implementing solutions like:

- Contextual tool-tips
- Interactive modals with educational or informative content
- Accompanying PDF guides to train them or use alongside the experience
- Automated email reminders at critical times to nudge users back into the system
- Simple text changes (like button names or adding short instructions in-line)

While we're limited in the kinds of improvements we can make, the ultimate aim is to create clarity that makes users want to come back and use the Marketing application month over month, ultimately leading them to pay for an annual subscription.

There are lots of ways to go about doing this and I know you're all experienced enough to choose the right research and design methods here, but I'm going to share a few things I think we need to be really attentive about:

- How are users onboarded today versus how they should be? Why?
- 30 calendar days of use is actually a lot of time investment for someone. What behavioral phases would you expect people to experience over that time and how would you create experiences that map to them?
- SMB users are often not marketers by trade or education. They are often a developer or the founder in a startup who took on the marketing responsibility because they couldn't afford to hire a professional. How can these kinds of users still be successful in a marketing automation tool if they don't know marketing best practices?

How to sign up and get started: Use this link to sign up for your free 30-day trial.

<https://www.salesforce.com/form/signup/freetrial-salesforce-starter/?d=pb>

Recognize that the initial experience after sign-up isn't Marketing. It's Starter which is a suite of tools and only one of them is Marketing. The initial tool-tips and first-time user experience you'll see immediately after signup are for the foundational Starter experience which leans towards Sales Cloud. You work for Marketing Cloud so we need you to focus there. To do that, you will need to locate the option to "turn on marketing features" which can take up to an hour. The *actual* marketing user experience and product that needs guidance will be available after that process completes.

Understanding Marketing Cloud, Salesforce, and Starter: Salesforce is a technology platform made up of features and capabilities that can be woven together into applications that serve different business functions like supporting sales reps, customer service call centers, and automated marketing campaigns. We call these applications "Clouds": Sales Cloud, Services Clouds, and where we are in Marketing Cloud. You can think of the Salesforce platform almost like an operating system for businesses. Each cloud team like ours builds new platform capabilities and weaves them together with existing capabilities to create useful, seamless applications that we sell to big enterprise businesses. We have not historically sold these applications to SMBs because it hasn't been cost effective for those customers who don't just need individual Clouds like Marketing Cloud or Sales Cloud - they need all the clouds together. So Salesforce created Starter which is a simpler version of *all* Cloud applications that we have woven together into one experience to let them try basic features, free for 30-days. After the 30 days they might use just one of the cloud applications or they might use all of them. Where I need you to focus for this project is only on the Marketing instance of Starter, the simpler version of [our Enterprise application](#).

What I care about: I am much less concerned about high-fidelity designs than I am a high-fidelity argument. I don't want to simply see that you can help a user understand how to use the system, I want to know why using the system in a particular way can help them to understand the value that extends beyond the first 30 days.

Remember: Our engineering teams won't have capacity for 8-12 months to fix deeper usability issues, but our users cannot wait that long for help. What we do have capacity for now is "on-top" guidance like tooltips; "on-the-side" guidance like PDFs; and maybe a few "embedded" text updates. If you come back looking to overhaul the foundational experience, you're not going to like my response.

Use of AI: You're working in a professional design environment now. Use any tools at your disposal to get the job done well. Whatever you use, please be sure to identify where and how it was used. That said, don't expect to use any AI in your designed experience. We have another team called Agentforce who handles all of that and like the other teams, they can't get to this work for at least a year. So your final experience will have to rely on traditional [Salesforce Lightning Design System](#) components *without* any AI or agentic capabilities.

All the best,

Your Salesforce UX Team:

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