

Mastering onboarding emails on the monday app marketplace

Transform user trials into long-term success with actionable tips, best practices, and ready-to-use templates.



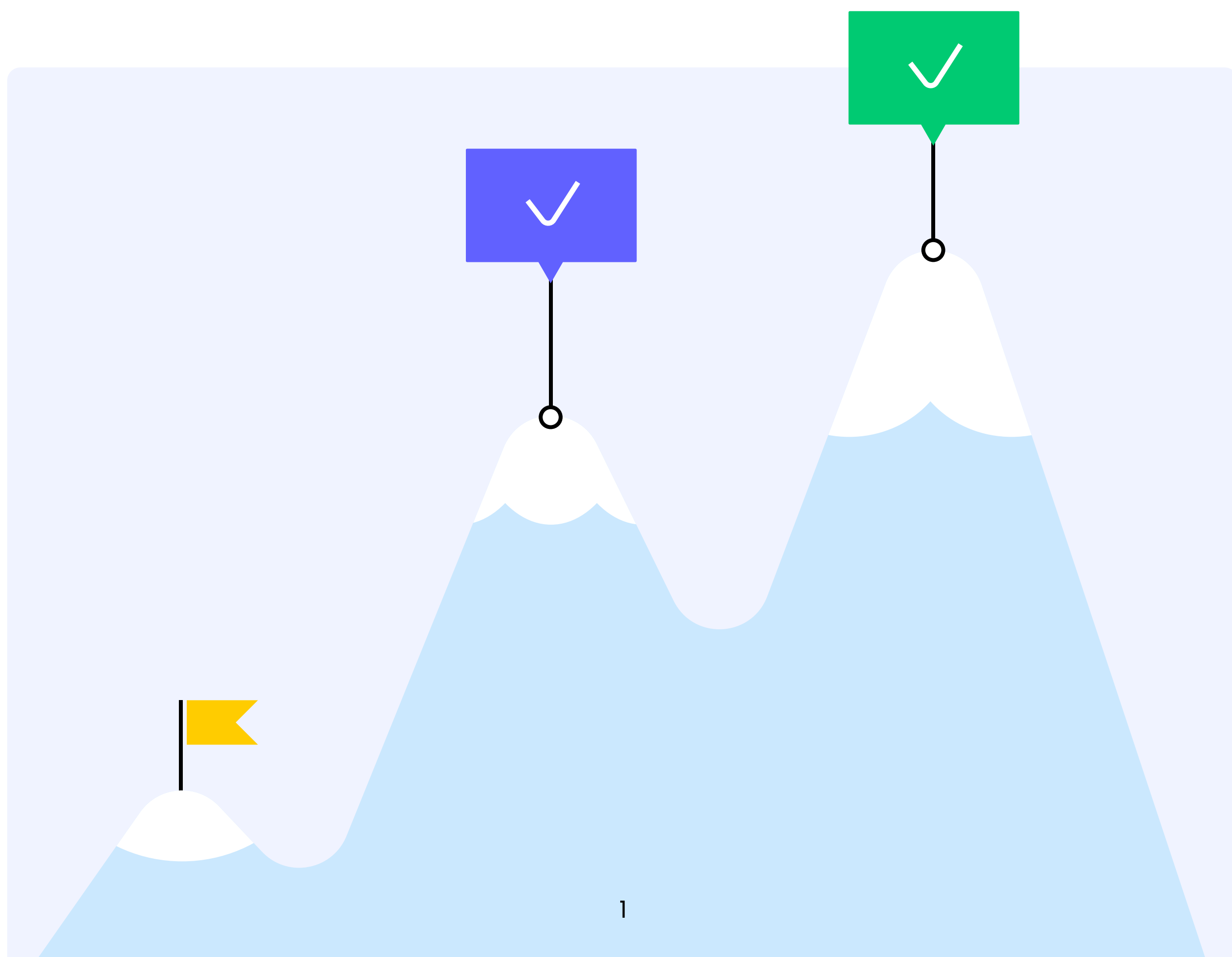
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The **goal** of this e-book

In this e-book, you'll find everything you need to know about onboarding emails for your monday apps. Consider it your guide to quickly helping users find value and stay engaged after installation.

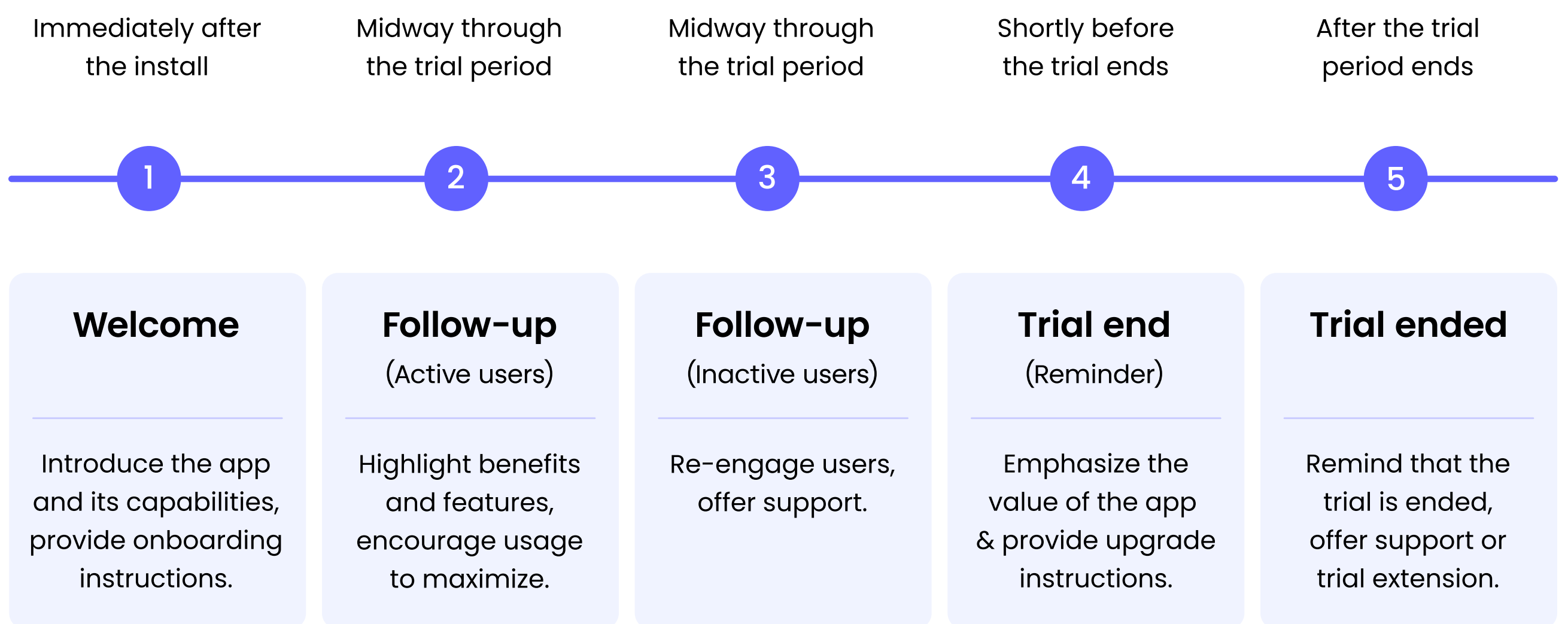
We'll walk you through the why, what, and how, providing practical tools and insights to drive initial usage, increase conversion from trial to paid, and boost user satisfaction. Whether you're just starting or looking to improve, this guide will equip you with effective strategies to achieve better results.



Why does onboarding emails matter?

Onboarding emails are essential for helping new users quickly understand how to use your app for their needs. Right after installation, users need to see the app's value, experience "aha!" moments, and build trust with your product and brand. These emails guide users through key features, offer tips, and provide support exactly when needed. Triggered onboarding emails, in particular, stand out because they are timely, relevant, and personalized. This approach boosts user engagement, enhances the overall user experience, and leads to higher conversion rates from trial to paid plans.

Below is a flow visualization of the key onboarding emails we'll focus on in this e-book. We'll provide best practices and guidelines for each type in the following pages.



Technical essentials for your onboarding emails

Implementing an effective onboarding email strategy requires careful consideration of the technical aspects involved. Here are the key components to ensure a seamless setting of your onboarding emails.

Webhooks

monday.com sends webhooks for events like installation, trial start, trial end, and subscription start. These messages contain key information about the user or account, such as user ID, account name, URL, and email. For more information, refer to the [webhook documentation](#).

Tracking installation

When someone installs your app, monday.com sends a webhook with the installer's details (email, account ID, etc.). You need to configure your webhook URL in the developer center, and capture the installer's details from the POST request.

Tracking first use

Log the first use of your app in your database using the account ID or user ID from the [app context](#). It is up to you to decide, according to the app's use case, what user activity is defined as first use.

Example solutions:

1. Log to database: Record the event on your backend when the app is first accessed or used
2. Simulate webhook: You can send an HTTP request to your webhook URL to simulate a webhook from monday
3. Get user information: Use the ["me" query](#) to get the current user's information

Know who you're emailing

Understand who you're emailing. The app installer is usually an admin, but any team member can use the app. Your first user may or may not be the installer.

Example scenario:

- Installer: Aziz (Admin)
- First User: Jessica (Team Member)

Example scenario: (continued from previous page)

In this case, Aziz installs the app because Jessica, who is not an admin, wants to use it. Therefore, you should differentiate between email campaigns targeting the installer and those targeting the first user, as these may be different people. Remember, installation is guaranteed, but first use is not.

For the purpose of this e-book, the provided templates address the installer as the user. Ensure you edit the content according to the recipient you are aiming at.

Choosing your email platform

Selecting the right email service provider (ESP) is key to managing and sending your onboarding emails efficiently. It's completely up to you which ESP to choose, but here are some popular options used by app owners on the monday marketplace: Mailchimp, SendGrid, and Klaviyo. Some app owners even use SuperMail, one of the popular apps on our marketplace, to handle their triggered onboarding emails.

Each of these platforms has its own strengths, so consider what features are most important for your needs, such as ease of use, integration capabilities, or advanced analytics.



Best practices for **crafting effective onboarding emails**

Creating effective onboarding emails is both an art and a science. The art lies in crafting engaging and compelling messages that resonate with users, while the science involves using data and best practices to optimize timing, personalization, and content. By following these best practices, you can compose emails that not only inform but also engage and delight your users, helping them see the value of your app faster, and ultimately convert into paying customers.

Personalization

Personalizing emails can significantly improve engagement.

You can start simple by using the user's name. Even a small touch can make a big difference in making your communication feel more personal and relevant

Timing

The timing of your emails is crucial. Each type of onboarding email should be sent at an optimal time to ensure it's relevant and useful. For example, send a welcome email immediately after installation and a trial end reminder shortly before the trial period ends.

Content

Ensure each email includes key elements such as a compelling subject line, a clear call-to-action, and links to helpful support resources. Your content should be concise, informative, and drive the user towards taking the next step.

Design

Your emails should be visually appealing and easy to read. Start with simple text-based designs, which can be highly engaging without requiring extensive design efforts. Additionally, be mindful of using monday.com assets in your emails, so recipients can clearly identify that the email is from your app and not from the platform itself.

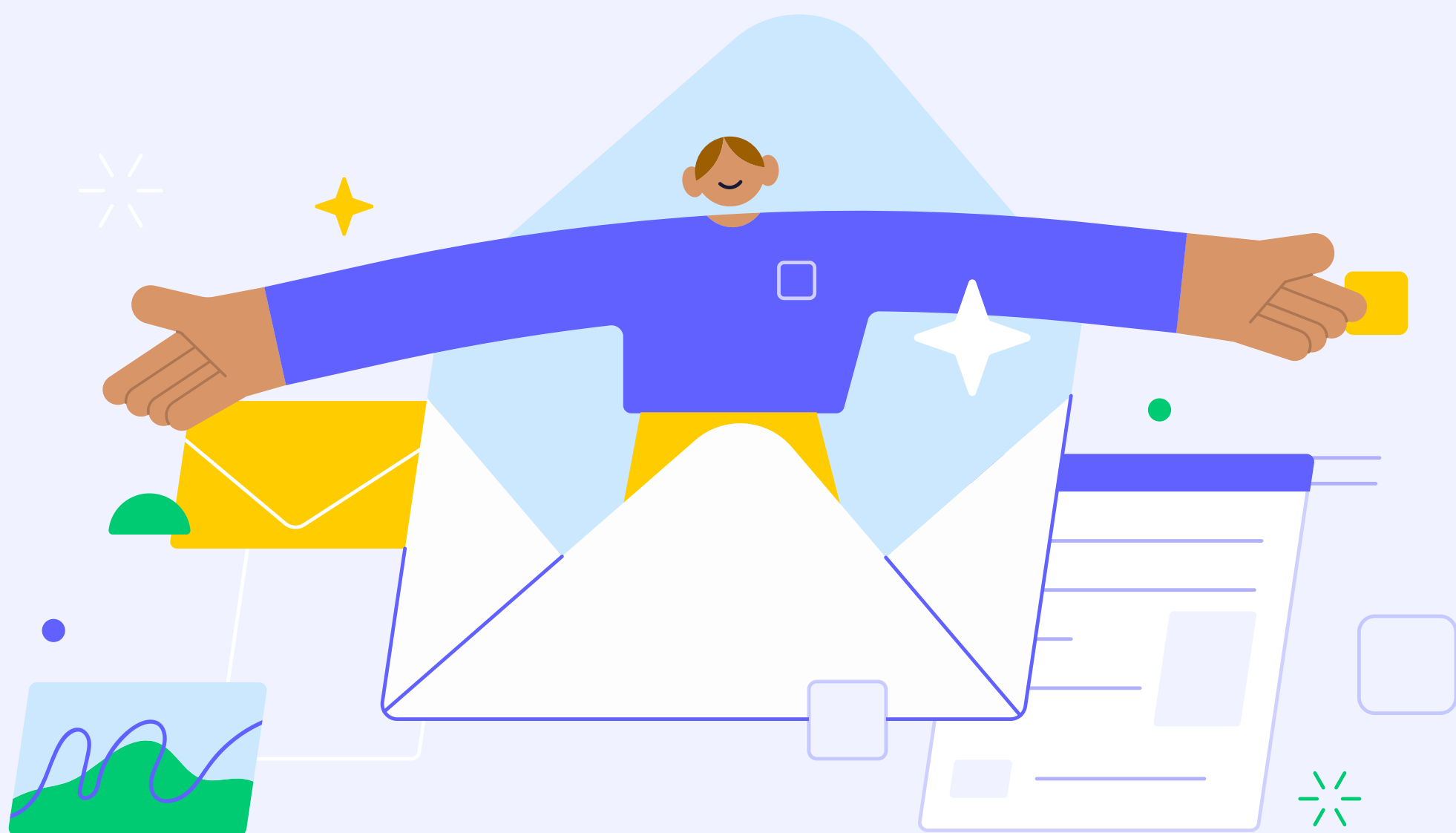
Testing and optimization

Continuously test and optimize your emails. A/B test subject lines, content, and send times to see what works best and use these insights to improve your email strategy over time.

Using email templates

The templates in the following pages incorporate the best practices we've outlined but remember there is no one-size-fits-all solution. Use these templates as inspiration and customize them to fit your app's unique voice, style, and use cases, considering the resources you have available.

Each template includes suggested content snippets to simplify your emails creation process, highlighting relevant parts to add at each stage. Whether you offer 1:1 support, onboarding videos, or support articles, tailor your emails to reflect these resources. These content snippets aim to help you structure consistency and clarity while effectively guiding users through their onboarding journey.



1 | Welcome

User Sentiment: Expectation, curiosity, and the need for guidance.

When to Send: Immediately after the app is installed.

Trigger: install webhook

In the welcome email, your goal is to set the stage for a successful user journey. Highlighting the key features and providing easy-to-follow onboarding instructions can significantly enhance user engagement and shorten the time to see your app's value.

Sending the email on behalf of the app's owner or a team member can add a personal touch, increasing trust and engagement. Additionally, offer onboarding resources and support options to help users get started smoothly and encourage them to explore the app.

Subject line options:

- Welcome to [App Name]
- Thanks for choosing [App Name]! Let's get started
- Ready to explore [App Name]? Start here!

Email body:

Hi [User Name],

We're excited to have you on board with [App Name]. To help you get started, here are some key features and initial steps:

{{Insert chosen content snippets here}}

We're here to ensure you have a great experience. If you have any questions, feel free to reach out!

Best regards,

[Your Name]

[Your Position]

[App Name]

Suggested content snippets

Component	Example
Onboarding instructions: Step-by-step guide to start using the app	"Follow these steps to get started: [link to guide] "
Video tutorial: Link to a video tutorial	"Watch our getting started video: [link to video] "
Value proposition: Core advantages your app offers	"With [App Name] , now it's easier than ever to [Value proposition 1] and [Value proposition 2] "
Key features: Highlight main features of the app	"Explore these key features: <ul style="list-style-type: none">• [Feature 1] to do [specific task]• [Feature 2] that enables you to easily get [specific outcome]• [Feature 3] to [specific benefit]"
Support information: How to get help or support	"Need help? Contact our support team at [link to support] or visit our help center [link] "

2 | Follow-up (active users)

User Sentiment: Engaged, seeking to maximize value.

When to Send: Midway through the trial period for active users.

Trigger: When user first users the app, according to the event you set

During the trial period, it's essential to captivate your users and demonstrate the value of your app quickly. Show them how to unlock its full potential for them and for their team members with practical tips and real-life use cases. This is your opportunity to transform initial interest into lasting engagement by illustrating the benefits they can experience. Also, sharing inspiring testimonials and success stories to reinforce the app's value.

Keep in mind that the definition of "active users" varies between apps and use cases - it's up to you to determine what constitutes meaningful action or engagement based on your app's specific activity metrics. Also, for some apps, demonstrating value during the trial period might be challenging, and you may need to focus on highlighting long-term benefits and potential ROI.

Subject line options:

- Tips to get the most out of [App Name]
- Maximize your [App Name] experience with these tips

Email body

Hi [User Name],

We hope you're enjoying your trial of [App Name]! Here are some tips and use cases to help you make the most of your experience:

{{Insert chosen content snippets here}}

Best regards,

[Your Name]

[Your Position]

[App Name]

Suggested content snippets

Component	Example
Usage tips: Practical tips for using the app	"Try using [Feature 1] to enhance your workflow."
Interesting use cases: Unique or advanced use cases.	"Did you know you can also [Use Case] with [App Name]? Here's how: [link]"
Success stories: Sharing success stories of existing customers	"See how [Company Name] achieved [specific result] using [App Name]"
Feature highlights: In-depth look at specific features	"Have you tried our [Feature 2] yet? It's designed to help you [specific benefit]. Check out this quick guide to get started."
Support information: How to get support and reach out	"Need help? Contact our support team: [link to support]"

3 | Follow-up (inactive users)

User Sentiment: Frustration, confusion, lack of motivation, or possibly forgotten they installed the app.

When to Send: Before the midway point of the trial if no usage is detected.

Trigger: Calculate according to the app_trial_subscription_started webhook

For inactive trial users, it's crucial to address potential obstacles and remind them of the app's value. Offering personalized support and trial extensions can help re-engage these users. Reshare key resources they might have missed from the first email to simplify their onboarding process. Effective communication can significantly improve the chances of converting inactive users into active ones.

Subject line options:

- Need help getting started with [App Name]?
- Struggling with [App Name]? We're here to help!
- Let's get you started with [App Name]

Email body

Hi [User Name],

We noticed you haven't had a chance to fully explore [App Name] yet. We're here to help you get started and make the most of your trial.

{{Insert chosen content snippets here}}

Best regards,

[Your Name]

[Your Position]

[App Name]

Suggested content snippets

Component	Example
Personalized support: Offer personalized support sessions	"Would you like to schedule a 1:1 onboarding session? [link] "
Resources reminder: Reshare onboarding resources that the user might have missed	"Here you can learn how to easily get started with [App Name] : [link to guide] "
Trial extension: Offer to extend the trial period	"Need more time? We can extend your trial: [link] "
Success stories: Share a customer stories to motivate disengaged users	"See how [App Name] helps other companies to achieve [specific result] : [link] "
Features overview: Highlight key features	"Discover the key features of [App Name] : [Feature 1] , [Feature 2] "

4 | Trial end reminder

User Sentiment: Potential excitement about the app, or possible uncertainty about the decision to purchase.

When to Send: 3-5 days before the trial ends

Trigger: Calculate according to the app_trial_subscription_started webhook

As the trial comes to an end, create urgency by highlighting the key benefits and successes the user has experienced. Highlight the key benefits and successes the user has experienced, and encourage them to upgrade with clear calls to action. Offering trial extensions or discounts can help with their decision. Additionally, ensure support is readily available to address any final concerns and provide high-touch engagement.

Subject line options:

- Your [App Name] trial is ending soon - Don't miss out!
- Continue using [App Name] - Upgrade now!
- Your [App Name] trial expires in [Number] days

Email body

Hi [User Name],

We hope you and your team have found [App Name] valuable and useful for your needs! Your trial period is ending at [Trial end date], and we'd love to have you continue using it to achieve [specific benefit].

{{Insert chosen content snippets here}}

To upgrade, simply follow these steps:

1. Open the monday marketplace from the platform's top menu.
2. Click on the "Installed Apps" button in the top right corner of the apps marketplace.
3. Select [App Name] from the list.
4. On the app's main page, click on the "Billing" tab in the top left menu.
5. In the "Billing" tab, click on "Upgrade Plan".

Best regards,

[Your signature]

Suggested content snippets

Component	Example
Overview of the benefits: Highlight key features of the app and what they help achieve	"With [App Name] you can now [specific benefit 1], [specific benefit 2], and [specific benefit 3]"
Support information: Emphasize the ability to contact or schedule a meeting for a more personal assistant	Not sure how [App Name] fits for your use case? You can free to schedule a quick call: [link]
Trial extension: Offer to extend the trial	"Need more time to evaluate [App Name]? We'll be happy to extend your trial: [link to extension]"

5 | Trial ended

User Sentiment: Uncertainty, or potential loss of interest; Consideration of purchase.

When to Send: Immediately after the trial period ends

Trigger: app_trial_subscription_ended webhook

Just because the trial has ended doesn't mean the journey with your app has to. Users might not have converted yet for various reasons. Re-engage them by reminding them of the key benefits they experienced and the value your app provides. Offering a limited-time discount or trial extension can provide the extra time and incentive needed to decide. Ensure support is available to address any final questions and make the transition to a paid plan as smooth as possible. Additionally, asking for feedback at this stage can provide useful insights to improve the user experience and product offering.

Subject line options:

- Your [App Name] trial has ended
- Want to keep using [App Name]? Here's how

Email body

Hi [User Name],

We hope you found [App Name] beneficial and saw how it can enhance your [specific task or workflow]. Although your trial period has ended, you can still continue enjoying all the features and benefits by upgrading to our premium plan.

{{Insert chosen content snippets here}}

Best regards,

[Your Name]

[Your Position]

[App Name]

Suggested content snippets

Component	Example
Overview of key features: Highlight the primary features and their benefits	“During your trial, you experienced [Feature 1], [Feature 2], and [Feature 3]. Continue utilizing these features by upgrading”
Upgrade: Instructions on how to upgrade	“Ready to upgrade? Follow these steps: <ul style="list-style-type: none">• Go to the ‘Installed Apps’ button at the top right corner of the monday marketplace.• Find and select [App Name] from your list of apps.• Navigate to the ‘Billing’ tab located in the top left menu on the app’s main page.• Click on ‘Upgrade Plan’ in the ‘Billing’ tab.”
Trial reactivation: Option to reactivate the trial for users who didn’t fully explore the app or want to bring more team members onboard	Need more time with [App Name]? We’ll be happy to extend your trial: [link to extension]”

Common mistakes to avoid

After crafting effective onboarding emails and learning best practices, it's important to be aware of common mistakes that can undermine your efforts. Avoiding these pitfalls will help ensure that your onboarding process is smooth, engaging, and successful, ultimately leading to higher user satisfaction and retention.

Lack of clear goals

Failing to define clear goals and success metrics for the onboarding process can lead to a disjointed experience. Onboarding emails should guide users toward specific milestones or actions that demonstrate successful adoption.

Overwhelming users

Sending long, complex emails with too much information upfront can overwhelm and disengage users. Onboarding emails should be concise, focused, and progressively introduce features or concepts.

Lack of personalization

Sending generic, impersonal emails without any customization or personalization is a missed opportunity. Personalized emails using the recipient's name, company, or other details can increase engagement.

Poor timing

Sending emails at inappropriate times can reduce their effectiveness. Ensure your onboarding emails are timed to align with key moments in the user's journey, such as immediately after sign-up or during critical decision points.

Lack of human touch

While automation is essential, solely relying on it can make your communications feel impersonal. Incorporate elements that add a human touch, such as including a personal note from the app owner or offering opportunities for users to schedule 1:1 onboarding calls. These personal interactions can significantly enhance user experience and build trust.

Moving forward

Thank you for taking the time to explore this e-book on effective onboarding emails for your apps on the monday marketplace. We hope you found the strategies and insights valuable..

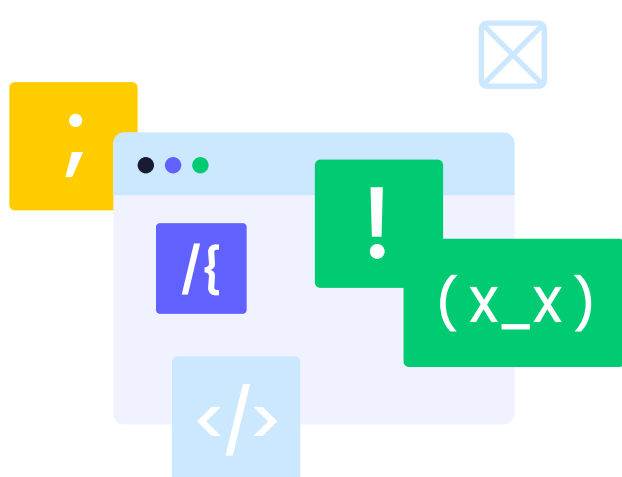
Implementing these techniques is just the beginning. Iteration is key to success. Continuously experiment with subject lines and calls-to-action (CTAs) to find what resonates best with your audience. As SaaS open rates for welcome emails can vary from 40-70%, your first attempt might not yield the expected results. Use this as an opportunity to learn and improve.

By refining your approach and adapting based on feedback and performance metrics, you can create a seamless and effective onboarding experience that boosts user satisfaction and retention.

We appreciate your time and effort in reading this e-book and look forward to hearing about your success. Feel free to share your feedback and thoughts to help us improve future editions and upcoming resources.

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