

PROCORE

In-app messaging strategy

Led by Amanda Bridge



Background

BACKGROUND

**While at Procore,
I was put in
charge of
optimizing our
in-app
messaging.**



BACKGROUND

Problem

Our users weren't actually engaging with our in-app messaging.

Users were closing banners and modals within **1-2 seconds**

70-80% close rate for multi step walkthroughs

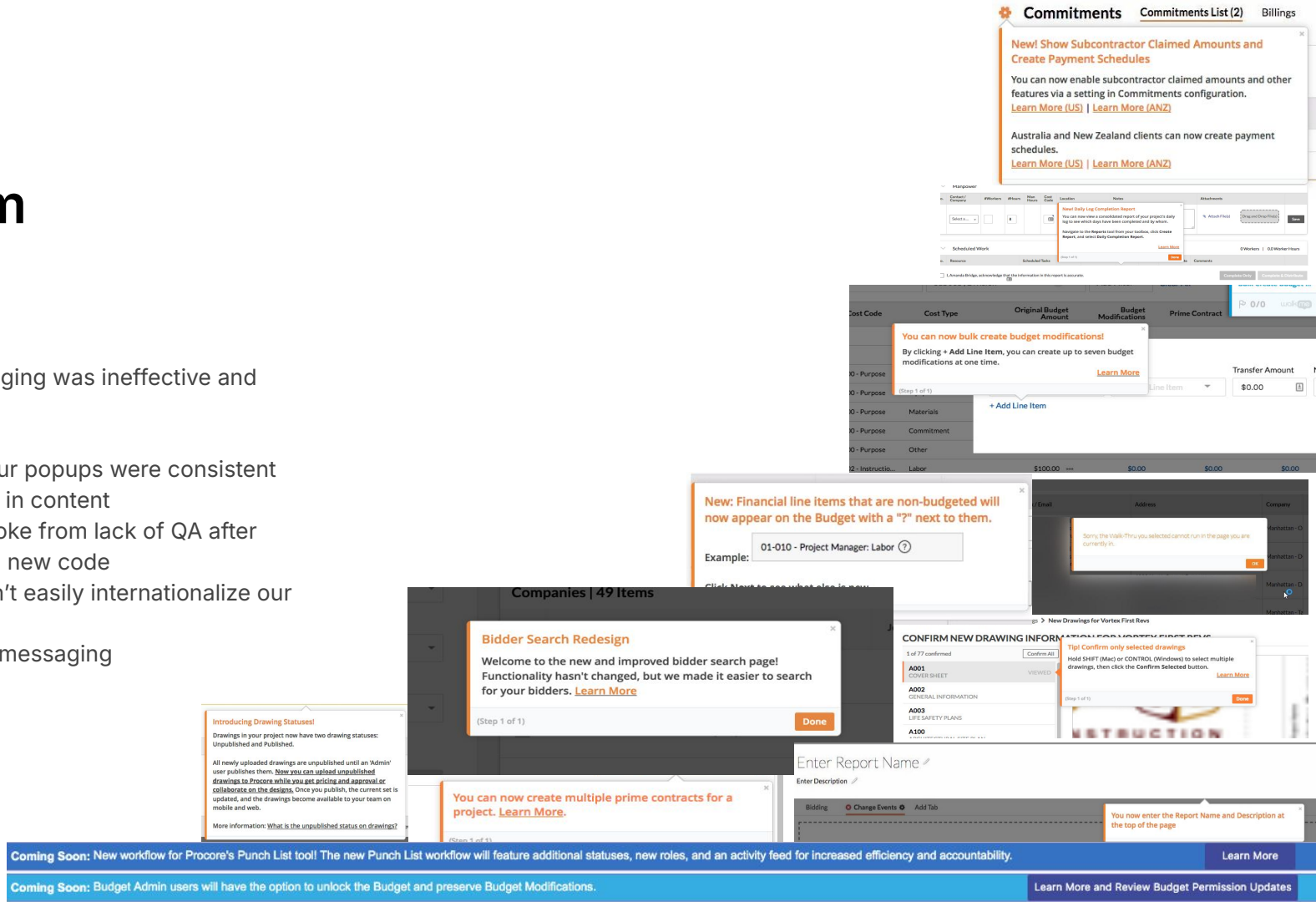
<1% engagement on embedded links

BACKGROUND

Problem

Our in-app messaging was ineffective and overwhelming

- None of our popups were consistent visually or in content
- Guides broke from lack of QA after publishing new code
- We couldn't easily internationalize our content
- Duplicate messaging



Coming Soon: New workflow for Procore's Punch List tool! The new Punch List workflow will feature additional statuses, new roles, and an activity feed for increased efficiency and accountability.

[Learn More](#)

Coming Soon: Budget Admin users will have the option to unlock the Budget and preserve Budget Modifications.

[Learn More and Review Budget Permission Updates](#)

BACKGROUND

Problem

Nothing was consistent, and our customers noticed.

NPS (December 2018)

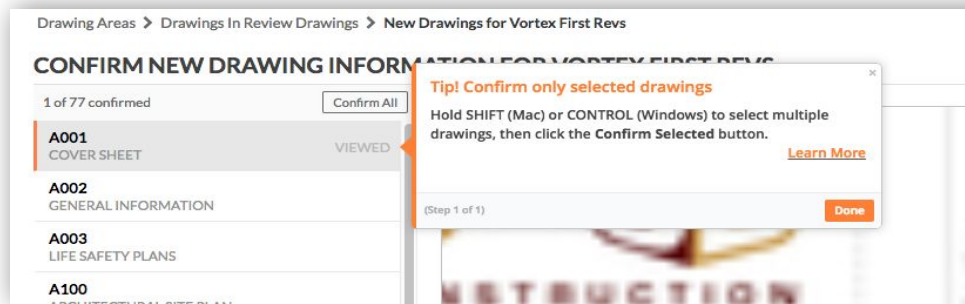
Score-based Follow-up Response

The interface is difficult to navigate. Also, requests similar to this one seem to pop up and interrupt actual work too often. Leave users alone long enough to actually use your product.

BACKGROUND

Hypotheses

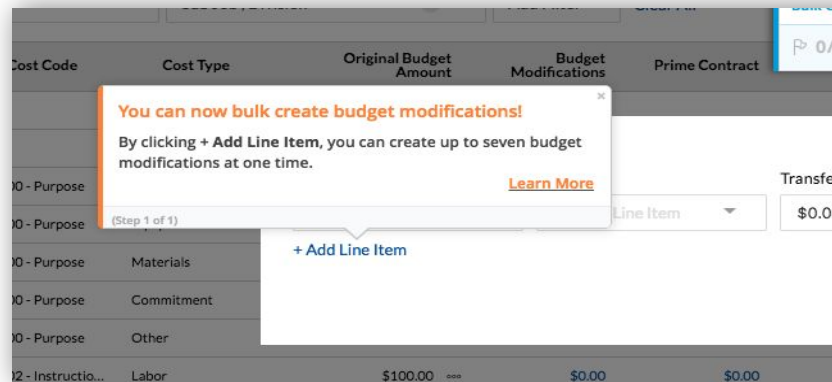
1. Procore's users want secondary product information to be **less interruptive** and more understandable.
2. Duplicate and overlapping messaging will be decreased if we **give teams visibility** into what popups are currently in production.
3. Inconsistencies and cognitive load in our messaging will be decreased if we **build best practices** for how to design in-app messaging.



BACKGROUND

Pitch

1. **The problem:** Disjointed messaging impacting user engagement and satisfaction.
2. **Quantifiable success metrics:** Engagement metrics and user feedback.
3. **The business impact:** Inefficiencies causing internal friction and missed opportunities to educate users.
4. **Potential solution:** An opportunity to unify messaging strategy to improve both user experience and business outcomes.



Task

TASK

Objectives

1. **Evaluate our software stack** for in-app messaging.
2. Create **standards and guidelines** for in-app messaging use cases.
3. Analyze our **current processes and governance** and eliminate inefficiencies.
4. **Educate** the company on what we build.



Action

Form a cross-departmental strike team



UX Design

Marketing
Visual
Design

Sales
Product
Marketing
UX Writing
UI Design

Product Management

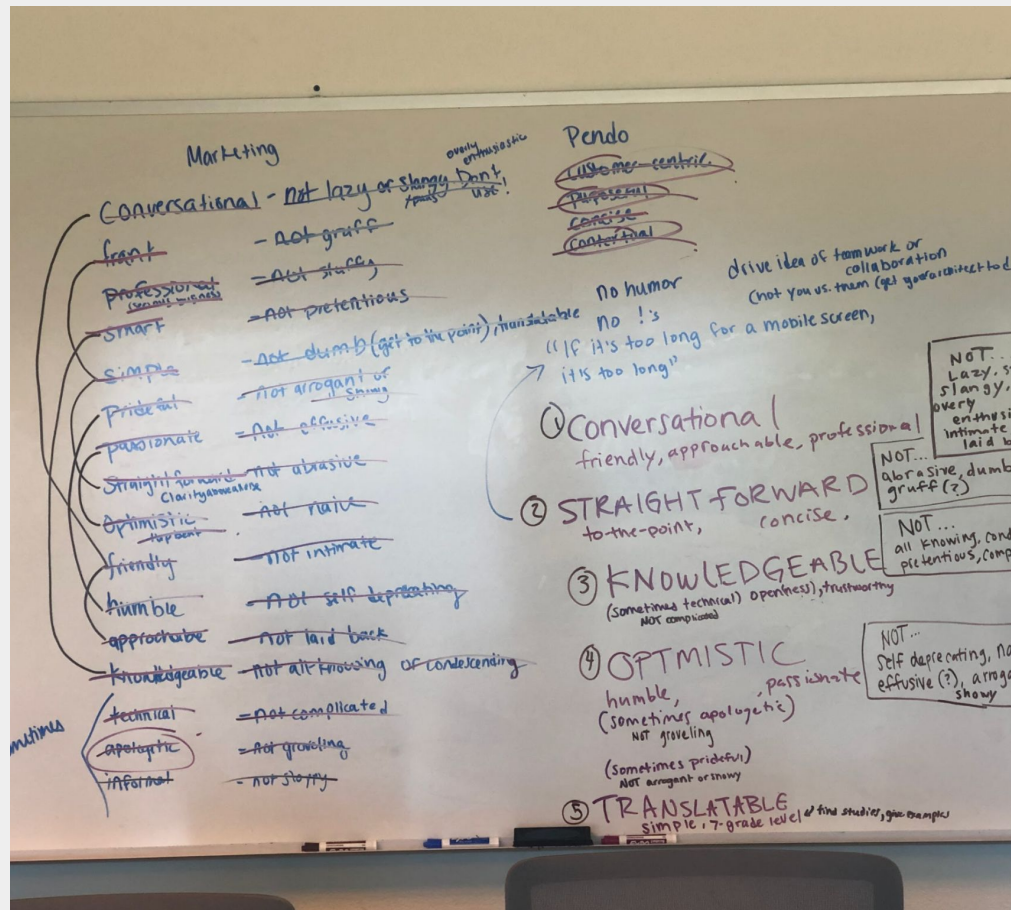
ACTION

Evaluate our current tech stack and priorities, and purchase new software that meets our needs.



ACTION

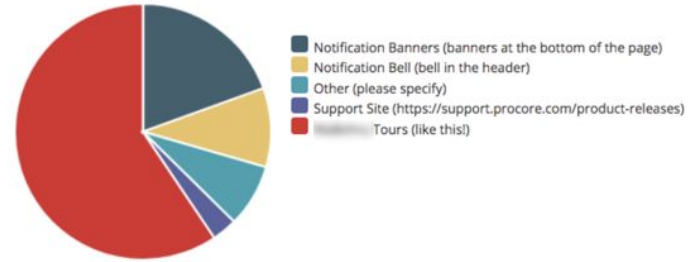
Build our foundational principles



ACTION

Evaluate user needs vs. business needs, and decide on what we should use Pendo for

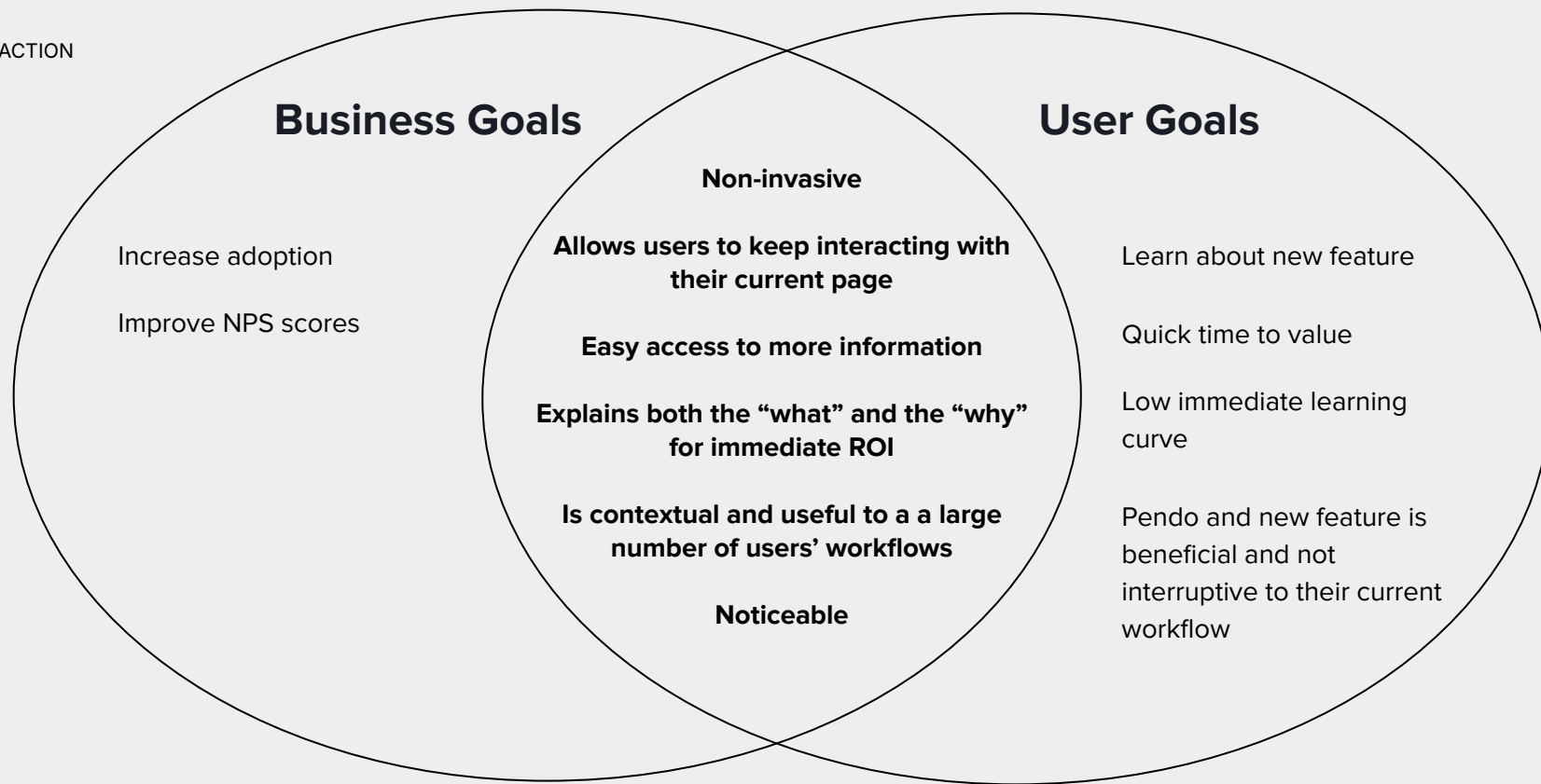
Q1: WHAT IS THE BEST WAY TO INFORM YOU OF NEW FEATURES THAT ARE ADDED TO PROCORE?



“It’s my job to stay on top of all the changes [in Procore]. If I’m having trouble doing it, I can’t imagine how the rest of our employees are managing that on top of managing a project.”

- IT @ KPRS, 2018

ACTION



ACTION

What we use Pendos for

Scheduled Maintenance
Procore will be performing scheduled maintenance on Saturday, September 7, 2019, from 6:00 pm to 7:00 pm Pacific time. During this maintenance, users may experience one or more interruptions in service. Thanks for your patience as we work to improve the Procore platform.

How likely are you to recommend Procore to a friend or colleague?

Not at all likely 0 1 2 3 4 5 6 7 8 9 10 Extremely likely

Permissions Feedback
Please share what's working and not working in regards to your experience with the new Permissions tool.

Enter feedback here

Cancel Send

What's New

- **Administración de aplicaciones: Aplicaciones incrustadas**
Instale y configure aplicaciones que se integren directamente en la interfaz del usuario de Procore.
- **Gestion des applications : Applications embarquées**
Installer et configurer des applications qui sont directement intégrées dans l'interface utilisateur Procore.
- **Formulaires : Formulaires à remplir sur le Web**
Remplir des formulaires PDF dans votre navigateur Web sans quitter l'outil Formulaires de Procore.
- **Formularios: Formularios rellenable en la Web**

[See all changes](#)

Welcome to Your Trial Project

You're here to find the best solution for your team, and we're here to support you. Let's start with taking a quick look at the basics of getting around Procore.

[Skip](#) [Start tour](#)

New! View and Manage Estimated Revenue

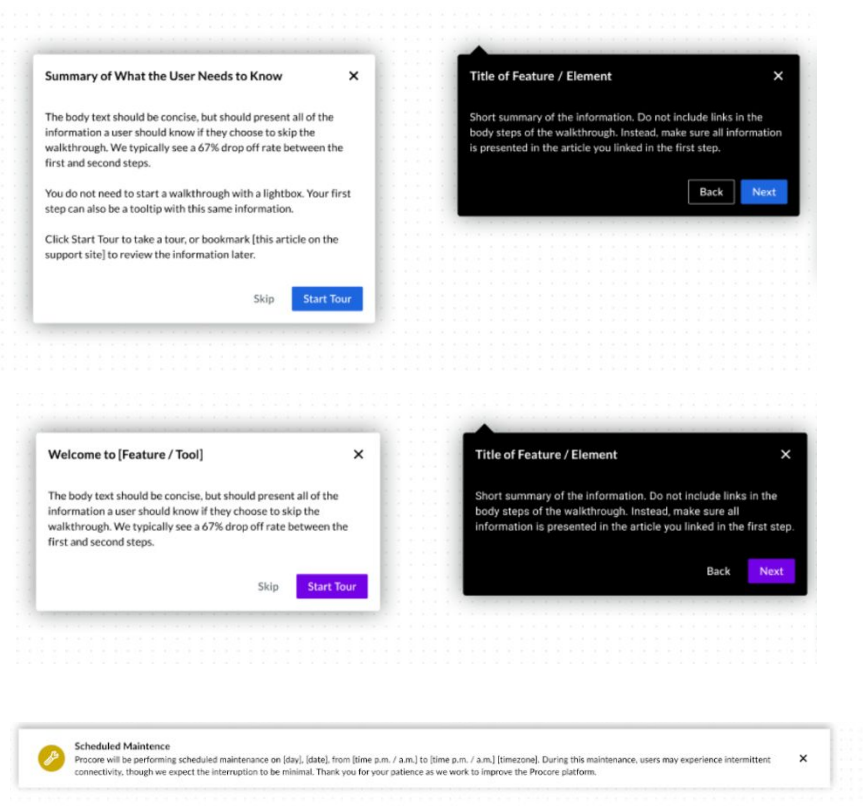
We know that early estimates of revenue and costs are critical to managing risk. Now, you can track Revenue ROM separately from Cost ROM and edit those values independently when you need to.

Take a brief tour, or bookmark [this page](#) to learn more later.

[Start tour](#)

ACTION

Design and build templates

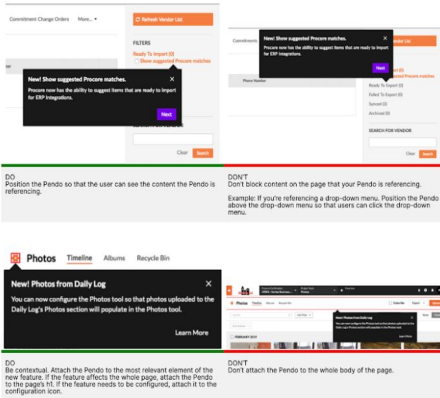


ACTION

Create standards and guidelines for in-app messaging use cases.

Tooltip & Walkthroughs

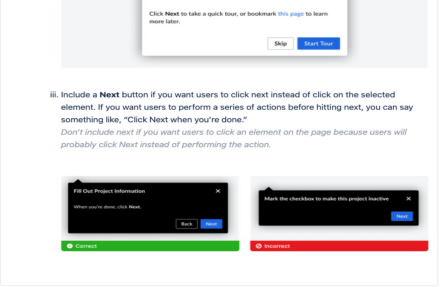
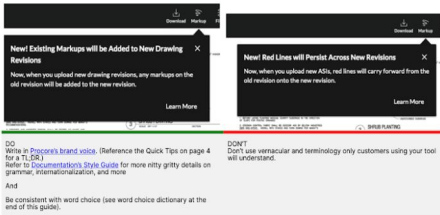
This section covers design considerations for new feature tooltips and walkthroughs, informational walkthroughs, trial walkthroughs, and informational tooltips and walkthroughs.



Sounding like Procore

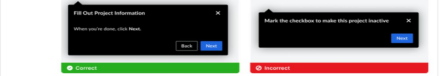
Because Pendo is now an experience in Procore, we need to make sure that we're speaking to users in the same way with the same voice and tone. Procore's tone in the product is currently being established by UX Content, but for now, we should be encouraging that in the product by always keeping the "why" using consistent vocabulary that anyone can understand, and always providing support for both tech-savvy users and those users who need a little bit more help.

Following the DOs and DON'Ts below will help your Pendo's sound like a native part of the application.



ii. Include a **Next** button if you want users to click next instead of click on the selected element. If you want users to perform a series of actions before hitting next, you can say something like, "Click Next when you're done."

Don't include next if you want users to click an element on the page because users will probably click Next instead of performing the action.



After you are done designing your guides in Figma, be sure to link them in the associated Jira ticket that your PM created, in the **link to Figma Design** field. If you were added as the UXer on this ticket, you will have been notified in email.

Next Steps

- Link your designs in the Jira ticket for each associated guide
- Building Guides in Pendo

Content

TEXT STYLES

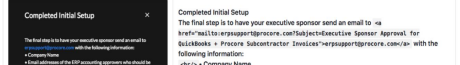
How you format your Pendo's text is going to make a huge difference in the intimidation factor that will ultimately drive your user to read your Pendo, or take one look at it and deciding that it's too much information. The ultimate goal here is to make the Pendo scannable. Many things play a part in making something scannable, but breaking up large pieces of information into digestible bits is a great place to start.

Quick Tips:

- Break up text with different subjects with two line breaks:

- Bold : action items that are a part of the workflow being described. Don't bold action items that are not part of the workflow being described.
- E.g. Click Save. Clicking Cancel will delete the item.
- If you want the user to perform an action, begin the sentence with the action you want them to perform.
- E.g. Attach a snapshot of the project's current drawings and documents to bid packages to give your bidders all of the information they need to make informed bids.
- Capitalize tool name.
Do not capitalize item names.
Do not capitalize user roles or titles unless referring to one specific user.
- E.g. John Doe, a Superintendent from Acme Construction says that he creates punch list items in Procore's Punch List tool so that his punch list reviewers, like his team's project manager, can have visibility into the punch list workflow that's happening on site.
- Parts of Procore
- 'Permission level' | 'Page' | Section on Page
E.g. You need Admin' permissions to access the Advanced Project Settings section of the "General" page in the Project level Admin tool.
- Tool > List > View [item] > Section *E.g. RFIs tool > RFIs List > View RFIs > General Information Section

In Pendo, use HTML in the Body and Title fields **ONLY** to create the styles you need.



ACTION

Create standards and guidelines for in-app messaging use cases.

Sounding like Procore

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DO
Write in [Procore's brand voice](#). (Reference the Quick Tips on page 4 for a TL;DR.)
Refer to [Documentation's Style Guide](#) for more nitty gritty details on grammar, internationalization, and more

And

Be consistent with word choice (see word choice dictionary at the end of this guide).

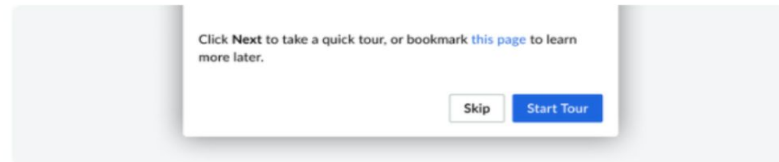


DON'T
Don't use vernacular and terminology only customers using your tool will understand.



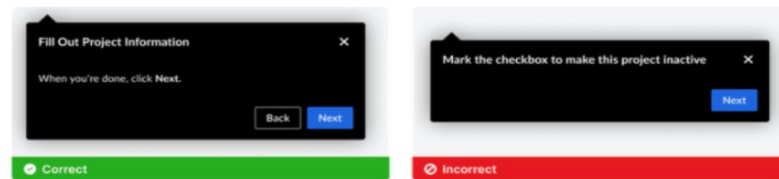
ACTION

Create standards and guidelines for in-app messaging use cases.



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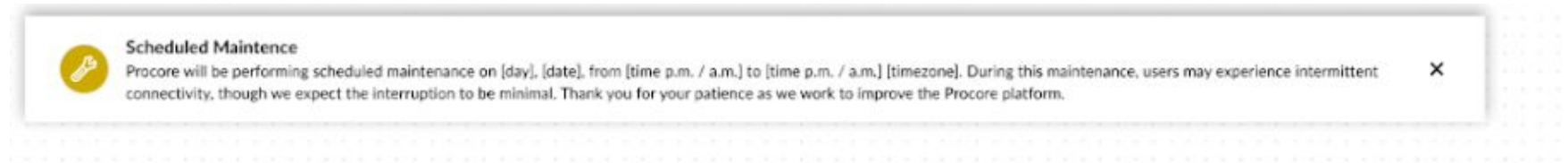
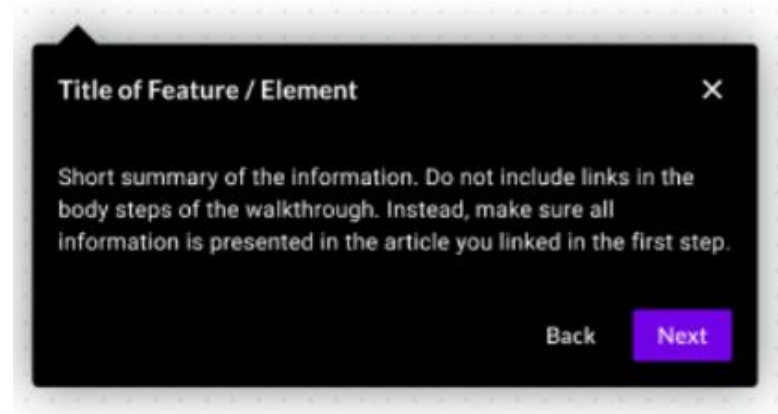
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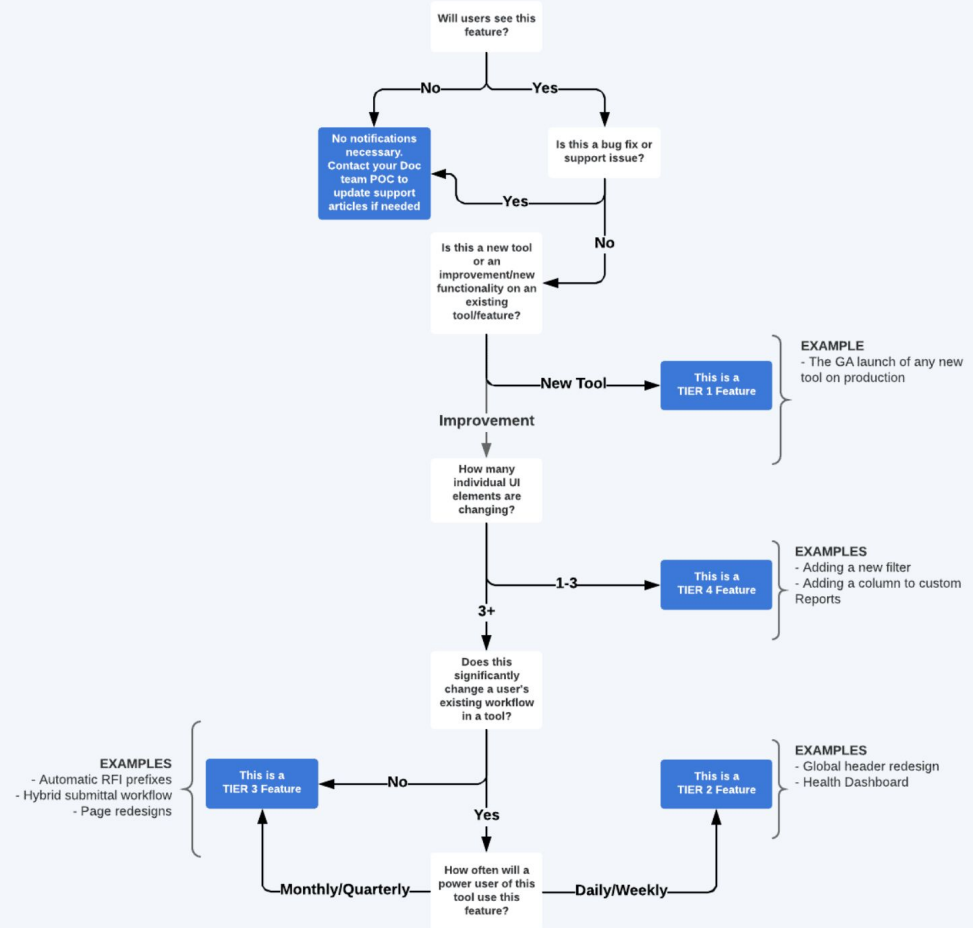
Create standards and guidelines for in-app messaging use cases.



New Feature Communication Decision Tree

ACTION

Create standards and guidelines for in-app messaging use cases.



ACTION

Evaluate processes and governance

STEPS

1

PREPARE

Information Consolidation | Target | Audit

2

CREATE

Write content and design user flows | Create Jira ticket | Create in Pendo | Request content review

3

TEST

Test on staging

4

REVIEW & PUBLISH

The Strike Team reviews and publishes the Pendo

5

ANALYZE

Analyze how your Pendo is performing

6

MAINTAIN & TEST

Test the Pendo against new features to make sure new code doesn't break the flow of the guide | Update the Pendo as needed

ACTION

Evaluate processes and governance



Results

Results

15% increase in clickthrough rate for multi step walkthroughs

100% decrease in duplicate messaging

82% increase in cross-functional teams visibility into new releases

29% decrease in NPS score responses mentioning popups

More effective handling of in-app messaging internally

Filter



Creator's Guide

Overview

Create

Types of Pends

Glossary

Appendix

Case Study

Decision Tree

Design & Content Guide

Knowledgebase