In-product discovery

A best practice guide for helping users discover
and start using GoCardless within your product

Introduction

At GoCardless, it's really important to us that our partners achieve their objectives and to deliver value to merchants. In order to do this, it's critical to maximise takeup of your integration amongst your customer base. From our experience of working with over 150 partners globally, we've found that in-product discovery is one of the most effective ways to increase connections. Not only does it raise awareness at key points of the customer journey, but once it's been implemented the ongoing effort to maintain is relatively small.

We want all our partners to succeed and to learn from our experience, so we've put together this brief best practice guide to in-product discovery. We've highlighted examples at different stages of a typical customer journey, and also given an indication of quick wins as well as more sophisticated techniques, We hope you find it useful!

Why promote GoCardless within your product?

1

Drive connections to GoCardless

Raise awareness of your integration, and target the most relevant merchants based on your customer's journey
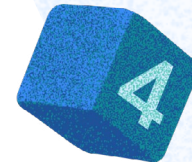
2

Increase customer retention

Getting merchants to use payments can lead to higher retention rates, especially amongst new or high value customers

3

Grow your recurring revenue

Getting more merchants signed up is the first key step to growing your revenue share or app fees

4

Make it a selling point

Increase your value proposition by highlighting your payments integration to prospective new customers or trialists
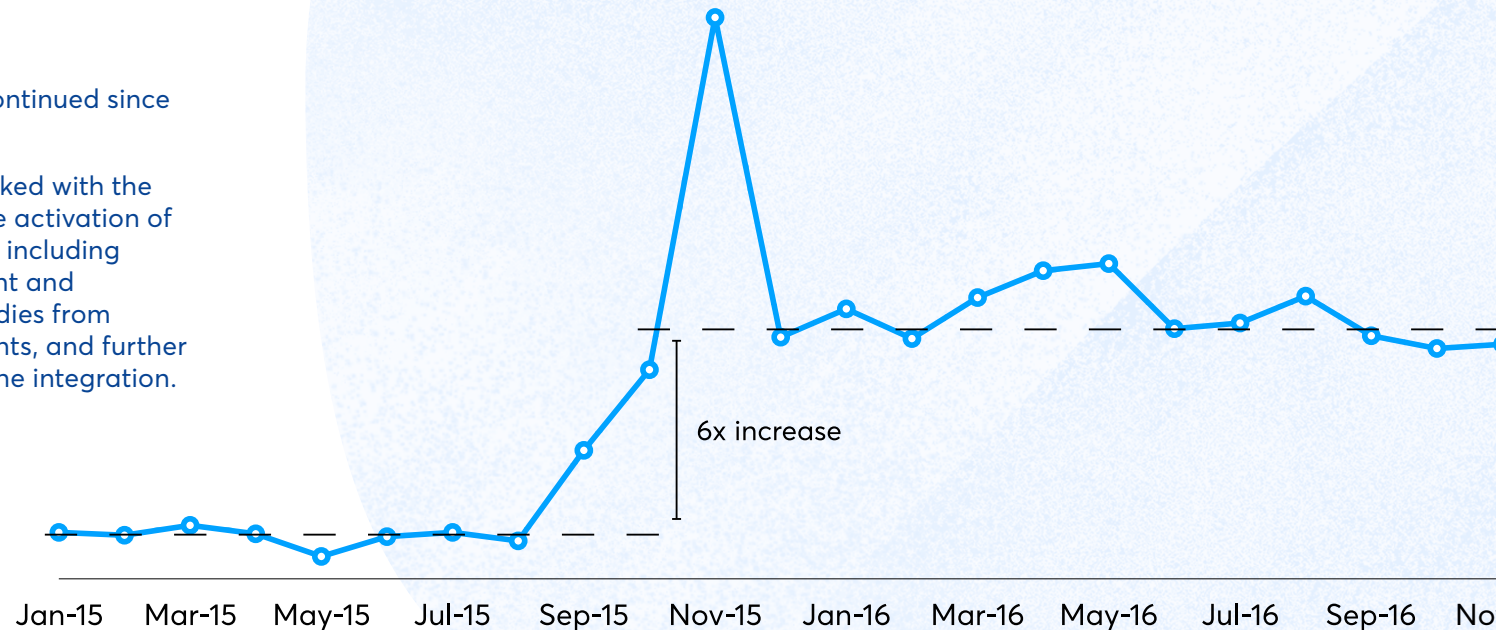
Case study: major UK accounting platform

GoCardless worked with a major UK accounting platform to implement in-product discovery to promote its payments integrations. The partner added a prompt on the main invoicing page for users that had not yet connected a payment service, promoting both GoCardless for Direct Debit, plus its preferred card provider. This was combined with an email and webinar campaign to the existing base to raise awareness. After an initial spike of 10x increase in connections, this eventually settled at 6x compared to before in-product discovery was implemented, and

this run rate has continued since then ongoing.

We have since worked with the partner to optimise activation of these connections, including educational content and webinars, case studies from successful merchants, and further improvements to the integration.

In-product discovery resulted in 6× sign-ups

6x increase

Jan-15   Mar-15   May-15   Jul-15   Sep-15   Nov-15   Jan-16   Mar-16   May-16   Jul-16   Sep-16   No

Best practise examples

We've provided examples at different stages
of a typical customer journey

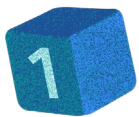## Stage of your customer journey

1 Acquisition

2 Onboarding

3 Usage

Promote payment integrations as a selling point of your software

First impressions count. The business software market is more competitive than ever, with many companies offering free trials and incentives for signing up. Use payment integrations as a selling point on your website or marketing collateral to demonstrate the extra value that these will bring to your users. For example, using the GoCardless integration to get paid on time and reduce admin. Highlighting these integrations on your homepage or product page will help ensure your product stands out from the competition.

Homepage panels

Include messaging on your homepage or product features page to demonstrate that popular online payment options will help your customers get paid faster, and are available for your product.

Accept online payments and get paid faster

We integrate with leading payment methods to give your customers a faster way to pay invoices.

GOCARDLESS

Get paid on time, every time by collecting payments automatically on invoice due dates using Direct Debit.

Learn more

PayPal

Accept debit/credt card and PayPal payments.

Learn more

Square

Collect point-of-sale payments by connecting Square.

Learn more

Browse add-ons

Include logos of popular payment methods you offer to help.

Make it clear why this will benefit your customers.
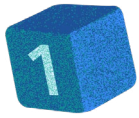
Product benefit panel

Highlight the benefit of getting "paid on time, every time" as part of your product features page.

Get paid on time, every time

Collect invoice payments automatically on due dates by using our GoCardless add-on.

Learn more

Demo Co

Set up a Direct Debit with Demo Co

First name

Jane

Last name

Smith

or use a company name

Email

Your sort code

e.g. 10-20-30

Your account num...

e.g. 12345678
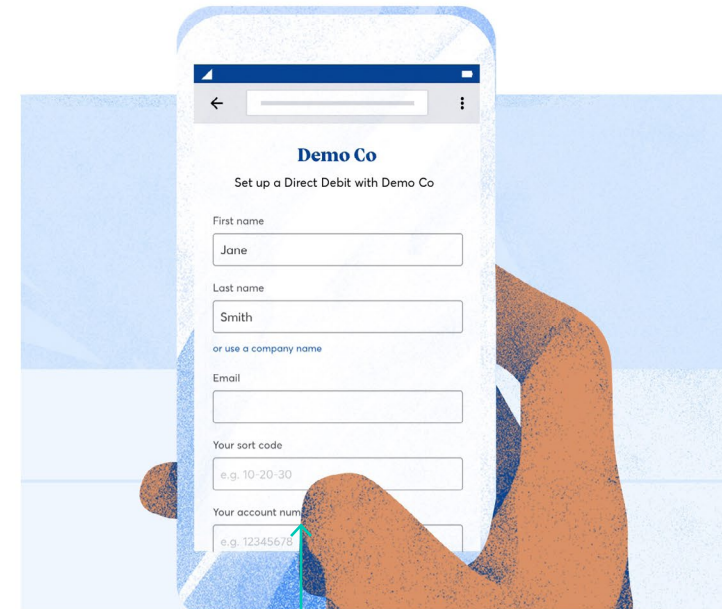
Graphics should fit with your branding, but ideally should help provide a tangible example of the feature.

Stage of your customer journey

1 Acquisition

2 Onboarding

3 Usage

Encourage your customers to set up payments during onboarding

It's critical to get the onboarding experience right to ensure your customers engage with your product and enable you to keep them ongoing as paying subscribers. Simply put, the more a customer engages with your product early on and understands the breadth of features available, the more likely they are to become a loyal customer.

A great way to do this is to highlight the key functionality that your product offers, including the ability to automate getting paid by Direct Debit, along with the key problems that this solves for your customers, for example getting paid on time and saving time by reducing admin.
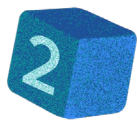
2 Onboarding

Onboarding example

Add a 'Set up payments' step to your user onboarding to help customers take advantage of online payments as they get started with your product.

1

£ **Invoice**app

Customers

Invoices

Expenses

Payment settings

Welcome
Get started with Invoice App

Style your invoice

2
Set up payments

3
Send your first invoice

For users who do not set up payments during onboarding, provide a link on the navigation to set up payments at a later stage.

Add a 'set up payments' step as part of your customer onboarding.

2 Onboarding

Onboarding example

Add a 'payment setup' step to your user onboarding to help customers take advantage of online payments as they get started with your product.

2

£ Invoiceapp

Welcome
Set up your account

Customers

Invoices

Expenses

Payment setting

Accept online payments for your invoices

Our recommended payment add-ons will help you get paid faster

✕

GOCARDLESS

Direct Debit with GoCardless

Ideal for on-going customers. Collect one-off, ad-hoc and repeat payments automatically on invoice due dates, so you get paid on time.

Set up now

Connect to existing account

Learn more

Another payment add-on

Ideal for credit/debit card and PayPal payments from one-off customers.

After clicking the 'set up payments' toggle, you can present the payment options.

Show the value to your merchant - i.e. it will help them get paid faster and offering an improved experience for their customers.

Provide a brief summary with links to 'set up' or learn more for each recommended payment method.

2 Onboarding

Onboarding example

Add a 'payment setup' step to your user onboarding to help customers take advantage of online payments as they get started with your product.

3

More about GoCardless

Choose GoCardless as your payment method

Set up now

Connect to existing account

Get paid on time, every time

Ideal for on-going customers. Collect one-off, ad-hoc and repeat payments automatically on invoice due dates, so you get paid on time.

✓ Not just for fixed amounts
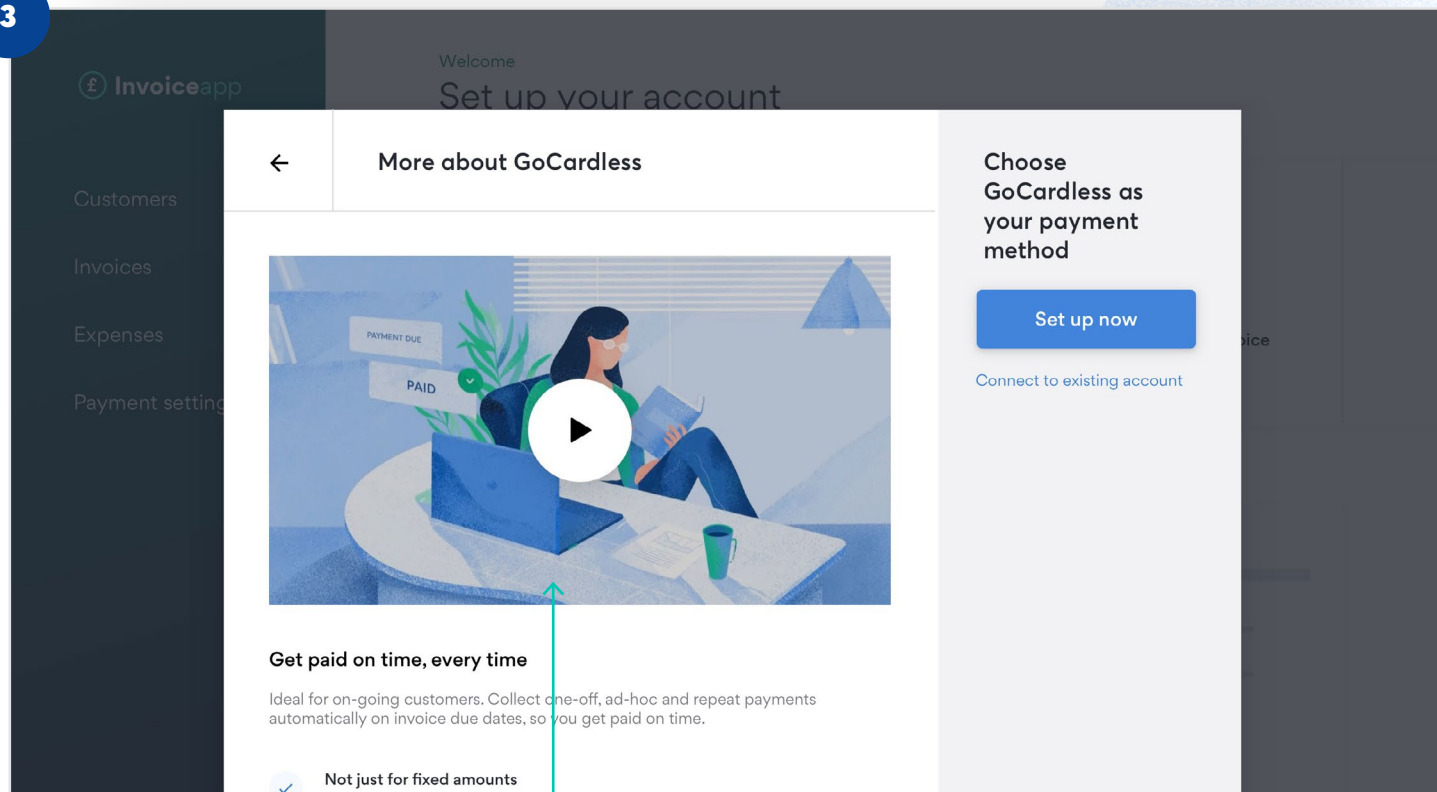
If possible, provide an overview of each payment method within your product, or link to an information landing page.

A short (<2 min video) is a great way to show the value of GoCardless to your customers and provide an overview of how it works with your product.

Stage of your customer journey

1 — Acquisition

2 — Onboarding

3 — Usage

Promote payments at the most relevant points of the customer journey

Promote payments where it makes most sense. Your software is likely to have a wide range of features, and you don't want to confuse customers about payments. Therefore think about the most relevant trigger points for promoting payments. For example, in an invoicing platform, consider promoting payments at the point of invoice creation, or when a customer is created. Alternatively if a customer is looking at a report showing overdue payments or is setting up invoice reminders, this is a clear indication that they aren't being paid on time and a payment solution like GoCardless may help them.

If you have a marketplace or lots of different integrations available, it's important that you make this highly visible. In our experience, users struggle to find GoCardless if we're hidden away in the 'Settings' section!

Enable payments on invoices

Show the value of setting up payments as part of the invoice creation process, and make it easy to do within the relevant screen(s) of your product.

1

£ Invoiceapp

Customers

Invoices

Expenses

Payment settings

Invoices
Create an invoice

✕

Client
Jon Smith - Selective Analytics ⌄

Date of issue
24 / 10 / 2018 ⌄

Date of issue
24 / 10 / 2018 ⌄

○ Enable online payments   Get paid faster by allowing your customers to pay online Learn more

Item	Description	Amount	Tax	Total

Save draft   Send Invoice ⌄

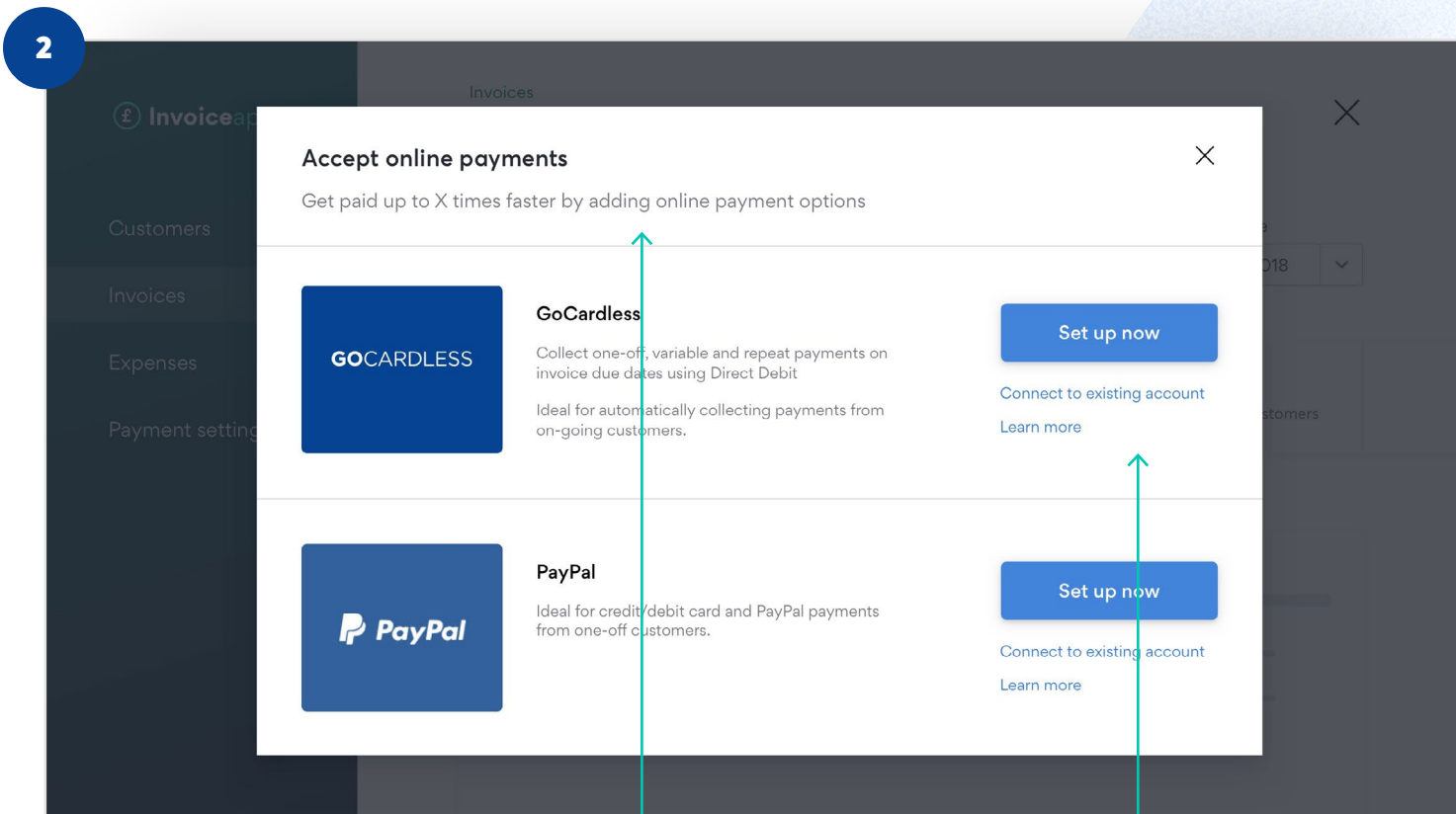Use a toggle, button or radio-button to emphasise simple set up

Demonstrate the value proposition to users i.e. getting paid faster

Provide an overlay or tool-tip to explain the feature in more detail.

Enable payments on invoices

Show the value of setting up payments as part of the invoice creation process, and make it easy to do within the relevant screen(s) of your product.

2

Accept online payments

Get paid up to X times faster by adding online payment options

GoCardless

Collect one-off, variable and repeat payments on invoice due dates using Direct Debit

Ideal for automatically collecting payments from on-going customers.

Set up now

Connect to existing account

Learn more

PayPal

Ideal for credit/debit card and PayPal payments from one-off customers.

Set up now

Connect to existing account

Learn more

After clicking the 'enable payments' toggle, you can present the payment options.

Show the value to your merchant - i.e. it will help them get paid faster and offering an improved experience for their customers.

Provide a brief summary with links to 'set up' or learn more for each recommended payment method.

**For more information please contact
partnerships@gocardless.com**

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