



Infinity^{QS}[®]
Quality Re-imagined

Flipping the Customer Experience:

A Foundation for Product-led Success

Creating a self-guided customer experience
that activates and automates SaaS sales.



Product-led Growth: Software Designed to Sell Itself

Many software companies are looking to leverage the principles of product-led growth to lower the cost of sale and build sustainable profitability into their businesses.

But moving to this model from a more traditional structure requires an organization to rethink its entire marketing, sales, and support strategy.

For SaaS providers, it's imperative to create solutions and systems that facilitate the growth of their product without the direct aid of a salesperson.

From product discovery through trial and purchase, the process must be seamless and frictionless.

Consider your own experience with the tools your marketing department runs on.

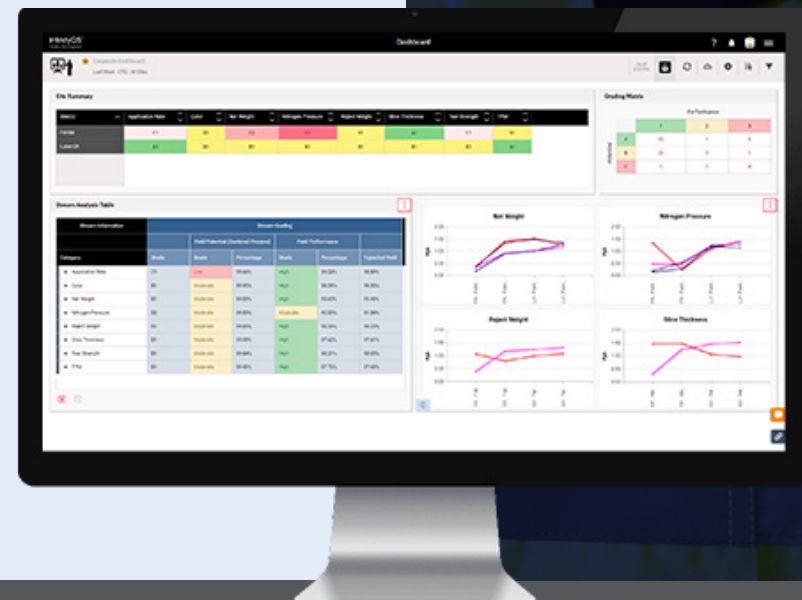
- ✓ You start your day with a **Slack** chat about a project in motion.
- ✓ You conduct a team meeting on **Zoom**.
- ✓ You deliver feedback for a graphic design on **Figma**.
- ✓ You set up automated email nurtures and social posts in **HubSpot**.

All of these solutions are sold through a **product-led** model—that is, a bottom-up, self-serve approach in which you bypass a salesperson and go straight to product use and evaluation. You can learn about the product, start using it immediately (often for free), and discover its value for yourself.

For SaaS providers like our client **InfinityQS**, there's no better way to increase adoption than to let customers experience your product firsthand. So when Greg Matranga, Vice President of Global Marketing at InfinityQS, told us they were ready to shift their Enact product to a freemium model, we immediately understood the scope of the challenge.

We knew that they would need to rethink their approach to marketing, sales, and support—and we organized the teams to meet their vision.

Learn how we helped transform the customer experience for Enact users—and the steps you can't skip if you're considering a similar model.



Project Snapshot

InfinityQS is a market leader in quality software for manufacturing. They've always used a traditional, consultative sales model. However, as they matured their cloud-based quality platform, Enact, they realized they had an opportunity to enable a new customer journey—one that puts customers in the driver's seat and empowers them to realize meaningful value from the software *faster*.



Challenge

- ✓ Shift Enact sales to a product-led experience
- ✓ Three-month deadline
- ✓ Ultimate goal: 1000 new signups by end of year

Strategy

- ✓ Customer-journey mapping and gap analysis
- ✓ New product and company messaging
- ✓ Technology analysis and integration plan
- ✓ Audit of current website
- ✓ Planning and design of a learning microsite
- ✓ Coordination of multiple teams and vendors

Execution

- ✓ New website content and messaging
- ✓ Revise website page-level SEO
- ✓ Create a targeted digital campaign
- ✓ Design, develop, and build learning microsite
- ✓ Create microsite video and tutorial content
- ✓ Provision ecommerce and signup sequencing
- ✓ Write nurtures for onboarding, recovery, and upsell

Results

- ✓ Coordinated launch of all program elements and promotions
- ✓ Real-time monitoring of product signups and use
- ✓ Within first 3 weeks, nearly 10% of signup goal achieved

InfinityQS at a Crossroads: Why Pivot to Product-led?

InfinityQS's Enact quality platform delivers the information manufacturers need to control quality, reduce waste and risk, and ensure compliance. Comparable software solutions are expensive, often overly complex, and can take months to implement.

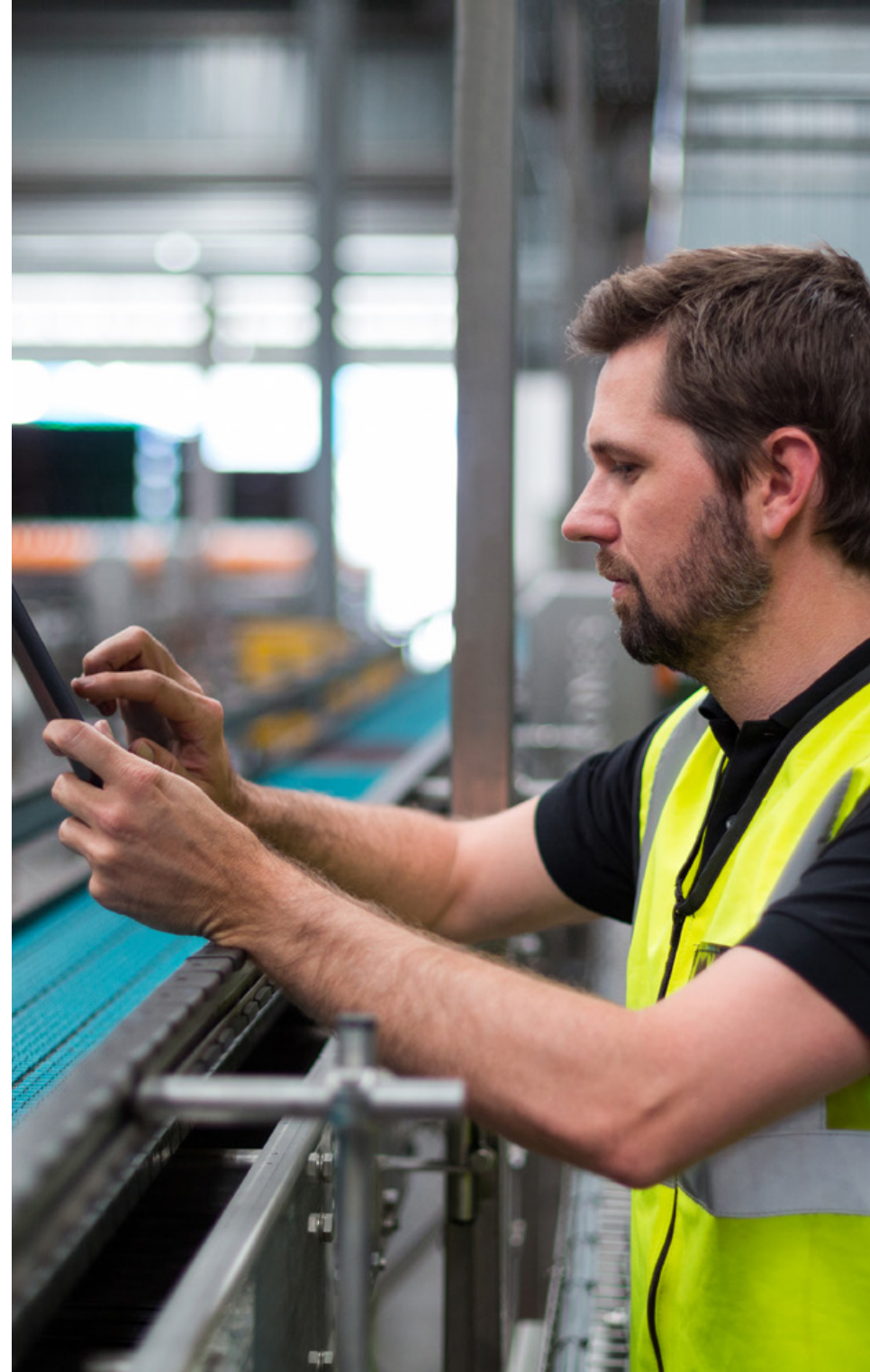
In contrast, Enact is quick to deploy, low cost, and simple to scale. However, InfinityQS's hand-held pilot process required customers to work through an account rep to set up, deploy, and configure an Enact instance.

For typical Enact customers—quality, process, and operations managers and engineers in busy manufacturing environments—that commitment of time and resources was a barrier.

InfinityQS realized that a **product-led model would eliminate friction**, giving prospective customers:

- / Direct, immediate access to a limited number of “freemium” licenses
- / The means to explore the software's capabilities in their live production environments
- / Significantly shorter time to value
- / Shareable data to make the case for purchase and expansion of the software

—at no risk to them.



Benefits, a Mandate, and a Critical Deadline

In planning the move to a product-led model, InfinityQS had to make a critical decision: should they provide a free version—or free trial—of the software to spur uptake?

They chose to offer new users two free Enact licenses to enable a valid and valuable test of the software and encourage users to purchase additional licenses for expansion.

Free licenses lower the barrier to entry for both new and existing InfinityQS customers.

- ✓ New customers expect to be able to self-educate, so a free-product-led model would let them “skip ahead” to answer their biggest question: How will this work in my environment?
- ✓ Existing customers—those who already use InfinityQS’s legacy on-premises software, ProFicient—would have a no-risk way to explore the enhanced features of the newer software and understand the advantages they would get from a cost-effective, cloud-based solution.

InfinityQS’s executive team began outlining the potential for a product-led sales model in March of 2022. Their CEO loved the plan—and issued a challenge:

- ✓ **Launch the freemium by June 15.**
- ✓ **Get 1000 new signups by December 31.**

That gave them just **under three months** to meet an ambitious set of objectives.

“Our launch date was non-negotiable. I and my team did not know at the time that our CEO was working externally with a private equity firm that was looking to acquire our company as part of its new, comprehensive manufacturing solutions suite. I enabled open access for Refactored so that they could drive momentum immediately, putting in place the strategic foundation we’d need to avoid slowdowns and rework during our restricted timeframe.”

—Greg Matranga
Vice President of Global Marketing, InfinityQS



What Can Go Wrong? Lots.

From the outset, we were painfully aware that moving from an established sales-led model to a product-led approach posed a vast array of challenges.

[Wes Bush, a pioneer, author, and leading consultant on product-led growth](#), emphasizes that a product-led model is not for everyone. If executed poorly, the approach can be disastrous—for you and your customers.

Because InfinityQS had a very short window to execute their pivot, we knew we had to immediately establish a laser focus on supporting the most important element of the change: their customers.



Critical Consideration: Is Freemium Right for YOUR Product?

Organizations that successfully execute this model offer products with some inherent advantages:

- Highly intuitive setup and usability
- Self-serve learning
- Immediately visible value
- Simple scalability

Most important: they provide a superlative user experience.

Steps to Success

Whether you're pivoting from an existing sales model or launching a brand-new SaaS product, it's critical to understand the end-to-end process that will keep you on track and help ensure a successful launch.

Vision

Discovery

Mapping

Teaching

Creating

Retooling

Optimizing

Vision

InfinityQS needed to maintain a clear, narrow focus throughout the process. Matranga brought our teams together to clarify the mission and create a set of guiding objectives.

Company objectives

- / Put our product at the center of our sales processes
- / Expand product awareness
- / Extend Enact use and footprint across global facilities
- / Increase demand and revenue by selling additional paid licenses and services

Customer objectives

- / Reduce barriers to entry for using Enact
- / See immediate value in our product
- / Understand product use in their context
- / Inspire greater exploration of the product
- / Enable easy product adoption
- / Facilitate direct purchase



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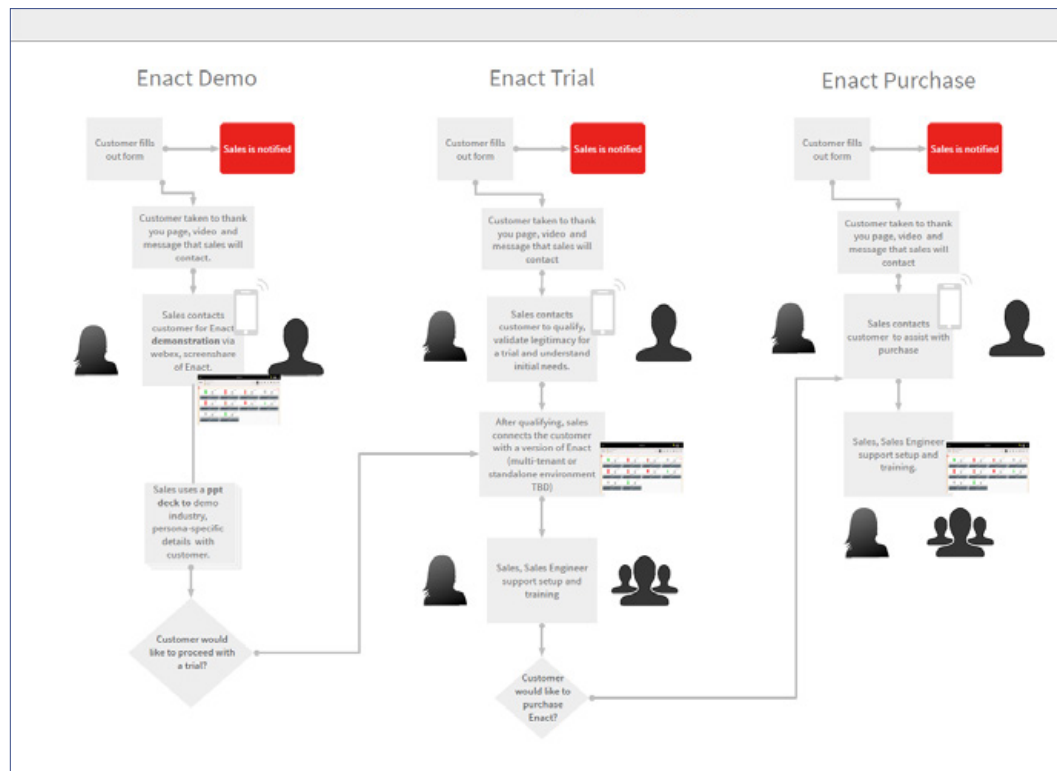
Optimizing

Vision:

A Clear Vision Defines the Scope of Change

InfinityQS realized they needed to rebuild the entire startup experience—from the ground up—so that customers who tried the product would benefit by:

- / Experiencing easy signup and startup
- / Quickly seeing value for themselves and their organizations
- / Intuitively understanding how to learn and use additional capabilities
- / Sharing their insights and results with others in their organization
- / Motivating their teams and leaders to expand and scale the software across their organizations



“With a clear vision guiding us, we organized our efforts around a targeted set of solution elements that became our MVP, creating them in parallel to ensure we’d have all our pieces in place when it was time to execute.”

—Rob Bean
Partner, Marketing Strategist, Refactored

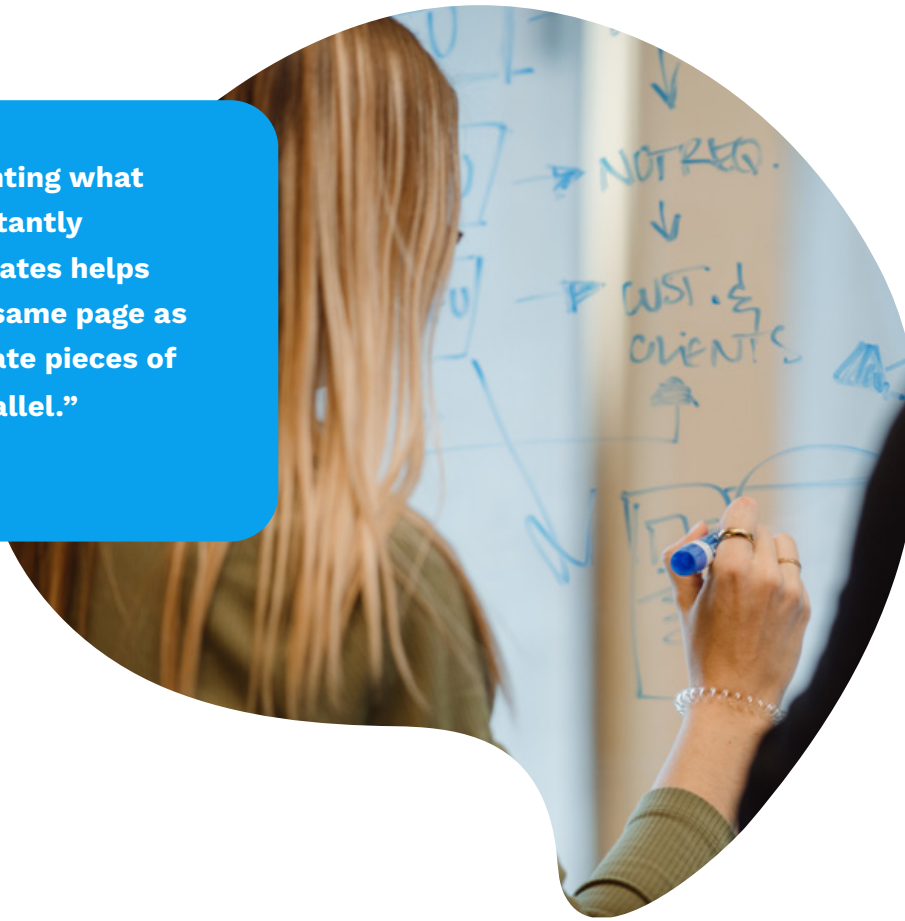
Discovery

This step is critical whether you're launching a new go-to-market or flipping an existing model. If, like InfinityQS, you've spent years building a sales process, discovery can be essential for challenging your teams to rethink established assumptions.

For InfinityQS, the freemium offer changed their software adoption flow from top-down to bottom-up. Instead of promoting the product to executives and supervisors, they needed to communicate directly to the people who would be using the software every day.

“Discovery, documenting what you learn, and constantly communicating updates helps keep teams on the same page as they execute separate pieces of the strategy in parallel.”

— Rob Bean



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Discovery:

A New Understanding of Our Customers

Refactored held detailed conversations with the company's CEO, COO, Product VP, and Global Partner Channel Director, and we worked closely with the product and leadership teams to re-imagine internal and public-facing messages.

Through the discovery process, we:

- ✓ Defined the core audiences for the freemium offer
- ✓ Created detailed personas for each audience group
- ✓ Wrote comprehensive company, product, and audience messaging to guide communications across channels and touchpoints



Mapping

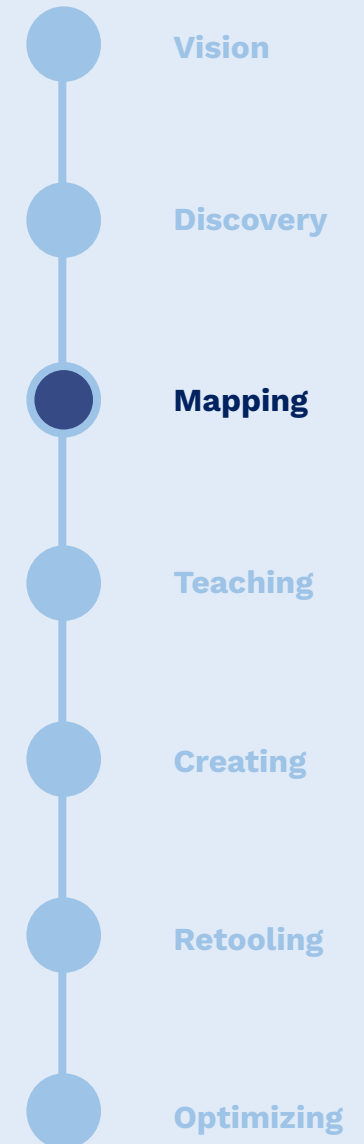
In a product-led scenario, you want to make it easier for customers to work with you—not harder. So you must be able to put yourself in their shoes—really understand their experience from start to finish.

Matranga empowered our team to run multiple discussion sessions to dig into the complexities of the freemium user experience. We had to ensure the new process didn't create barriers for prospective customers.

Refactored brought company stakeholders together and asked:

- / What will happen when we remove salespeople from the experience?
- / Where will customers face friction?
- / At what points will they need information, instructions, or documentation?
- / What value will they need to see?
- / What will motivate them to dig deeper?
- / What will convert them to paying customers?

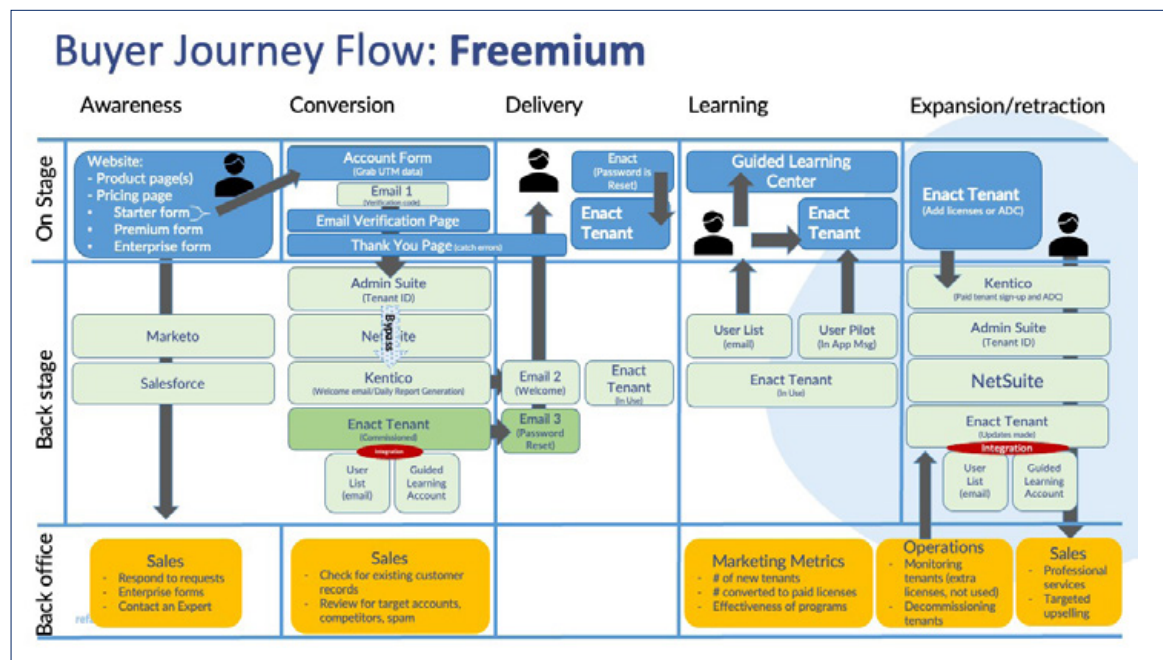
Creating a visual customer journey map helps you remove pain points and anticipate onboarding needs and roadblocks. Then, you can provide the communication and in-app guidance necessary to make it easy to navigate onboarding.



Mapping: Picturing the Customer Journey

Now, we could create a visual framework to describe in detail the path that customers will take, from initial awareness of the Enact solution to using it—then expanding and paying for it.

And, to build as complete a picture as possible, we translated the proposed buyer journey diagram into high-fidelity wireframes. These provided a tangible prototype that helped to ensure we were supporting all the steps of the journey, from signup to setup to ongoing learning.



Teaching

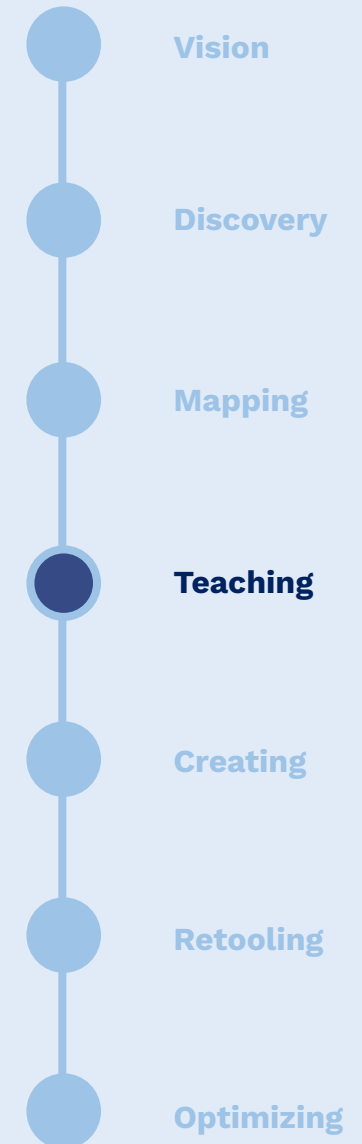
A core tenet of the product-led approach is enabling customers to self-educate as they dive in and use the software. To facilitate easy access to learning, we developed a Guided Learning microsite, paired with email nurture campaigns, to enable self-help and advanced learning for new users.

Together, the Enact software, the InfinityQS site, and the Enact Guided Learning site provide integrated learning options that help make the solution easy to adopt. These resources provide new users:

- / Centralized learning resources, organized by learning goal and user type
- / Personalized email nurtures, customized to their current stage in the learning process
- / In-app wizard and tips, providing critical context to users learning new interfaces
- / Video tutorials that showcase key concepts of software adoption
- / Tutorials and practice exercises, demonstrating processes for users to replicate
- / Online Help, allowing learners to self-educate at their own pace
- / Technical FAQs, answering common questions

“It’s essential that customers have a great experience with your software from the first moment that they begin working with it. Regardless of the complexity of your solution, they should be able to intuitively understand what to do—and the value they are getting from the product. That means you need to develop resources that users can access on the fly, without interrupting their learning process, at whatever point they are in that experience.”

— Rob Bean



Teaching: Guided Learning to Empower Users

Refactored worked with the InfinityQS product team to anticipate as many potential user questions as possible. We then developed a schedule for producing topical online learning videos and tutorials to be housed in the Enact Guided Learning site.

We linked the microsite to InfinityQS's primary website and leveraged UX best practices to:

- ✓ **Ensure anyone can use the site;** even before a user signs up, they can visit the Guided Learning site and determine whether they want to try Enact. After signup, users receive email messaging and in-app nurturing to guide them through the steps in their learning path.
- ✓ **Create multi-layered learning resources,** including introductory content, tutorials for advanced users, and tips on Enact account management for admins.
- ✓ **Optimize wayfinding** in the microsite to make it easy for visitors to find the topics and information they need.
- ✓ **Establish taxonomy** to enable the product team to easily add new content that will keep users engaged and learning with Enact.



Creating

A stellar customer experience requires a clear roadmap and seamless integration of content and design. During the creation of a product-led experience, it's imperative for teams to stay connected to the central vision, even if they are working on parallel elements.

To ensure a cohesive and seamless experience from top of funnel to conversion, Refactored's marketing and content strategists leveraged our new personas and messaging to:

- / Rewrite website pages and update site messaging
- / Develop and replace website content
- / Refresh search engine optimization to uplift new messaging and keywords
- / Produce promotional campaigns
- / Write nurture email communications



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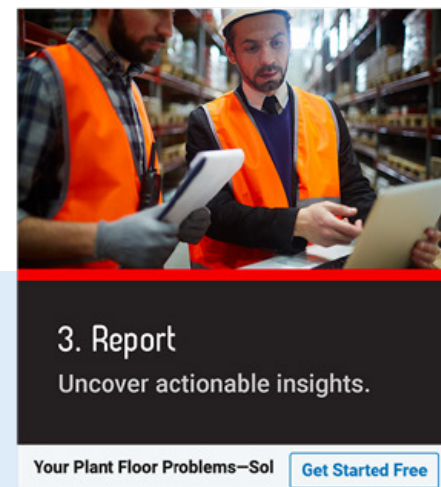
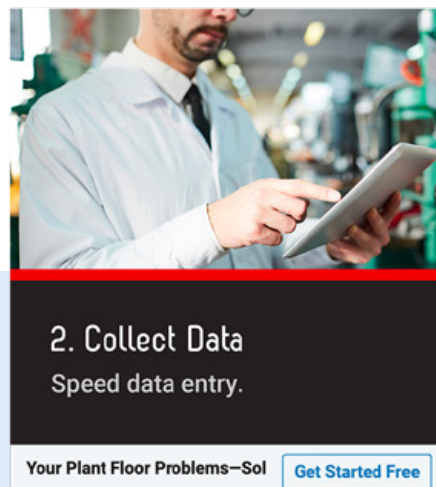
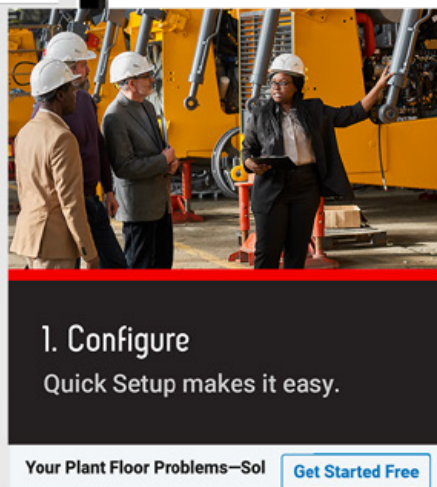
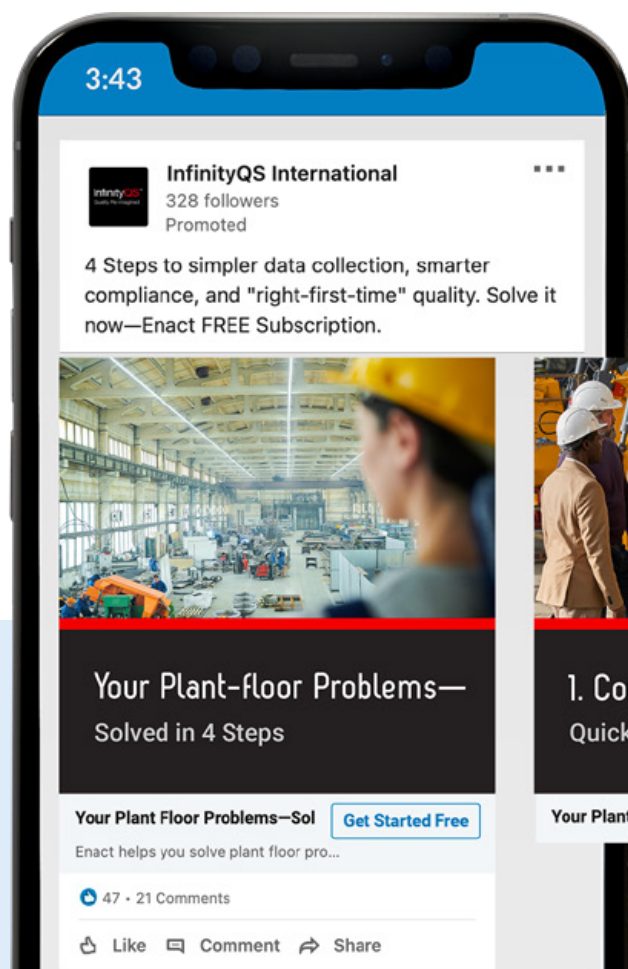
Retooling

Optimizing

Creating: Activating Awareness

Across channels, we wanted to ensure we reached out equally to existing customers, marketing engaged leads (MELs), and new customers. We wrote a freemium campaign that personalized messaging across our defined audiences—and enabled tailored experiences through:

- ✓ Landing pages for organic, paid, and social ads
- ✓ Ads for trade publications, LinkedIn, InMail, organic social, and search
- ✓ Email outreach to invite signups—and tailored to provide a personalized experience for each of our audiences
- ✓ Nurture programs, also tailored for each audience and contact type, to foster learning and engagement—before signup, after product activation, and during the onboarding and adoption process



Retooling

As Refactored's tech team performed discovery, we identified places in the customer journey that had previously been handled by the sales team—and would now be automated. We vetted and recommended experiences and technologies that would enable an integrated customer communication ecosystem.

- ✓ **NetSuite:** InfinityQS's legacy customer database needed to act as the central hub of data for the Freemium model, while sharing key customer attributes with other systems.
- ✓ **Storyblok and Netlify:** We paired two highly flexible platforms to maintain content management and hosting for the Enact Guided Learning microsite.
- ✓ **Userlist:** We selected a freemium-dedicated email client to push nurtures, reminders, and prompts to new users along their purchase journey naturally.
- ✓ **Userpilot:** An in-app messaging service provides contextual responsive prompts to users active in the software.



Customer Management



Website Management



Communications Management

“Because Refactored has a long history with us, they know our systems inside and out. We trust them to help us make the most of the tech solutions we have—and recommend technologies that will solve complex problems for us while helping us to contain our costs.”

— Greg Matranga

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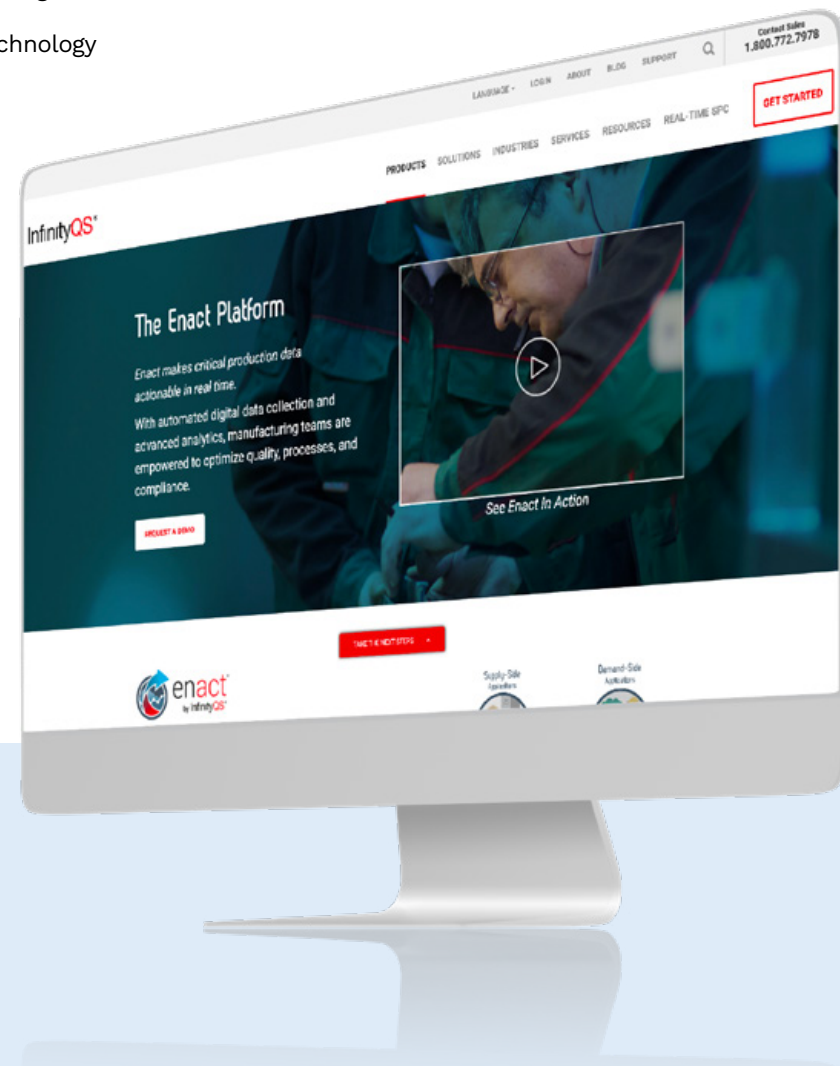
Retooling:

The Best Tech is the Tech That Users Don't Notice

Rebuilding the InfinityQS site, systems, and customer journey to enable a logical, simplified, and self-guided experience was a highly complex undertaking. Our execution required interdependent technical activities, each a significant project in its own right.

We coordinated across our combined teams and multiple vendors to ensure technology solutions were seamlessly integrated to create:

- ✓ **Numerous conversion opportunities** across the website that enable customers to start their experience by clicking links, banners, and ads
- ✓ **Embedded forms** on landing, product, and informational pages that sync directly into the Enact system, eliminating extra clicks or steps to complete a freemium signup
- ✓ **Email sequences** to guide users through signup, startup, and initial use of Enact
- ✓ **Integrated ecommerce functionality** to enable customers to move to a paid subscription when they are ready to add users or licenses



Optimizing

The Enact freemium program successfully launched on time and on budget.

Since the product-led approach was new to InfinityQS, we knew we'd need to carefully monitor and adjust the program as soon as it launched. We put in place key metrics so that we could respond quickly.

At launch, we immediately began monitoring:

- / Signup rates
- / Activation
- / Time to use
- / Time to value

Near-term metrics to follow include:

- / Retention rates
- / Expanded adoption
- / Convert to purchase
- / Continued engagement

“The greatest number of conversions—more than 50% of our total signups to date—are coming organically from the website. This tells me that we are speaking to the needs of our target audiences, and they are seeing Enact as a viable solution.”

— Greg Matranga



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Optimizing: Tangible Measures of Success

Even in its first weeks, the new product-led process was empowering customers by removing the risk and roadblocks involved in trying new software.

- ✓ **No more pre-approvals:** Quality professionals and engineers working on a manufacturing plant floor don't have to talk to procurement because the product is free. And they don't have to wait to see how the software will benefit them.
- ✓ **Reduced friction:** InfinityQS has successfully transitioned away from the time- and resource-intensive Proof of Concept.
- ✓ **Automated signup and startup:** Customers are empowered to direct their own use of the product and experience its benefits where they matter most: in their real-world production environments.
- ✓ **Ongoing learning:** InfinityQS continues to develop additional Guided Learning content that is customized for specific industries, audiences, and roles—building a learning library where each user can find information tailored to their specific needs.

An Unexpected Result

Two weeks after the freemium launch, InfinityQS's CEO announced that the company had been acquired by TA, a leading global growth private equity firm, and that it would be part of a new manufacturing solutions company: Advantive. During negotiations, the new owners were closely monitoring the execution of the Enact freemium project. Its successful launch under an extreme timeline was a lynchpin in securing the acquisition—and a new chapter for the company.



Customers want to self-educate. Let them.

For many B2B software providers, relying on a sales team to hand-hold every transaction is actually creating friction and slowing growth.

In many cases, today's software buyers don't want a demo—they want to experience the product for themselves. They want to play with features, push capabilities, and understand how it will bring value to them and their companies every day.

A product-led process empowers customers by removing the risk and roadblocks involved in trying new software. However, it's not the perfect solution for every product—or every organization.

Is this solution right for you?

If your organization is considering the potential of a product-led model, it's essential to get an outside perspective. A consultative conversation with an outside strategist can help you parse through essential questions:

- / **What is your strategy for putting your product at the front of your sales process?**
- / **What adaptations will you need to make to your product and company?**
- / **What does your team need to be ready to do to support the shift?**
- / **What parts of the process will require heavy lifting—and where will you need help?**

A product-led strategy is complex and challenging to implement—and getting it wrong puts your company at risk. But, done right, the product-led approach offers tremendous benefits.

Is it time for your company to make the shift?



Getting started

For nearly 25 years, the experts at Refactored have actively supported technical B2B organizations with complex marketing challenges. We're here to help you communicate your value, clarify your customer experience, and achieve your growth objectives.

[Let's talk about your project.](#)



About Us

Refactored is a full-service digital agency that specializes in marketing for complex, B2B companies that need to speed up, get unstuck, or start from the ground up. We develop and execute strategies based on deep industry understandings, audience insights, and recognition of the right channels and technologies to accomplish your goals. Our clients don't just achieve incremental gains. They leap forward.

Momentum Begins Here.

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