



Welcome to UserIQ!

The onboarding guide for new UserIQ users

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Welcome to UserIQ

The purpose of this document

This document is designed to help users onboarded to UserIQ. This document will be an outline of many of UserIQ's features and capabilities.

UserIQ can track up to 20 different user variables and can define highly specific customer segments.

UserIQ can provide an Intelligence Quotient for each user to deliver comprehensive customer health metrics.

Combining detailed tracking data and customer health metrics, UserIQ can target users with personalized engagements like tours, surveys and announcements at the right place and right time in the right way.

Define what you need from UserIQ

What is your role in your company? Are you customer success focused, marketing focused, or product focused? Determine your goal and what you need from UserIQ and use UserIQ's features to accomplish your goals.

Customer Success Engineers can use UserIQ announcements to draw attention to useful but overlooked features, teach or reteach workflows, or analyze user sentiment.

Marketers can use UserIQ to advertise new products, features or special events, and A/B test which approaches work best. They can use this to form more personalized and relevant experiences for users.

Product Managers can gather feature usage data down to click events, feature adoption, and feature sentiment.

UserIQ Technical Setup

Your developers will have a JavaScript snippet inserted into the footer of your web application. Each variable will be tracked for each user. This data can be exported

as a CSV file for further analysis. Review your custom variables and verify that they are the important user attributes and metrics you need to accomplish your goals.

Verify that the tracking code is installed and the proper custom variables are being tracked.

Custom Variables

Custom variables are user attributes that are pushed from your web app to UserIQ. Custom variables are used to segment and hone in on specific demographics in order to better analyze their behavior. This kind of laser focused targeting helps design highly personalized engagements. You can have up to 20 different custom variables.

Choosing Custom Variables

Custom variables should be relevant metrics, attributes or key performance indicators that are useful for targeting and personalizing content for your users.

Example variables

Custom Variable	Key	Value
User Email	user_email	john@doe.com
Signup Date	signup_date	2015-03-14
Premium Member	premium_member	true
Last Login	Last_login	2016-05-24
Time Zone	time_zone	pst
Role	role	nurse
Local Time	local_time	0402
Country	country	United States
Language	language	American English

Installing Custom Variables

In the footer of your web application, you will paste this snippet of JavaScript:

```
<script type="text/javascript">
  var _uiq = _uiq || [];
  //TODO: Update the user and account variables below
  //_uiq.push(['setCustomVariable','1','user_id','1234','visit']);
  //_uiq.push(['setCustomVariable','2','user_name','Tony Stark','visit']);
  //_uiq.push(['setCustomVariable','3','account_id','5678','visit']);
  //_uiq.push(['setCustomVariable','4','account_name','Stark Industries','visit']);
  //_uiq.push(['setCustomVariable','5','user_email','tony.stark@stark.com','visit']);
  //_uiq.push(['setCustomVariable','6','signup_date','2015-03-14','visit']);
  _uiq.push(["enableLinkTracking"]);
  _uiq.push(["trackPageView"]);
  (function() {
    var _uiq_config_url=("https:" == document.location.protocol) ? "https" : "http" +
"://feed.useriq.com/";
    var _uiq_prod_url=("https:" == document.location.protocol) ? "https" : "http" +
"://secure.useriq.com/";
    _uiq.push(["setTrackerUrl", _uiq_prod_url+"visits/push"]);
    _uiq.push(["setSiteId", "311019701"]);
    var d=document, g=d.createElement("script"), s=d.getElementsByTagName("script")[0];
    g.type="text/javascript";
    g.defer=true; g.async=true; g.src=_uiq_config_url+"useriq.js";
    s.parentNode.insertBefore(g,s);
  })();
</script>
```

Comment out the appropriate custom variables pushes or add more custom variables to push.

Integration

Make UserIQ more powerful with software integrations. Use Salesforce integration to push and pull more data for your users, allowing for incredibly detailed and laser focused targeting for your engagements. Integrate UserIQ with Zendesk, Hubspot, and Salesforce.

[How to integrate Salesforce with UserIQ](#)

User Intelligence

UserIQ is capable of gathering user intelligence through User Segmentation, Named Pages and Live feed.

What is User Segmentation?

User Segmentation is the grouping of your users by demographics based on the attributes you push with your custom variables. For example, you want to analyze the activity of a very specific group of nurses at a city hospital. So, you create a segment of users of nurses who last worked at 3 pm, who work at St. Joseph's Hospital, with more than 5 years of experience.

What can we do with user segmentation?

User Segmentation can be used to analyze the activity of specific demographics. Use the custom variables to sort your users into segments based on their activity or their attributes. For example, you have a segment of doctors in the north east who joined 2 months ago. Or nurses in the south who have been users for longer than 4 years.

[Learn about creating and defining segments here.](#)

What are Magic Segments?

Magic segments are user segments that are included by default. They sort your users as Active, At-Risk or Inactive users, based on their activity. Every company's user retention is measured differently, so [learn more about customizing your magic segments here.](#)

Using Named Pages

Named pages are specific pages of your webapp with a certain feature. This can be the payment portal, the product gallery, the home page, the dashboard, etc. If a specific feature is on a specific page of your webapp, it should be named. Named pages are important because they track feature usage and they easily identify page locations for in-app engagements.

Naming Pages

First, go to the UserIQ webapp. Click on SETUP at the top and click on Named Pages. Then, click on ADD NAMED PAGE.

- Campaign Themes
- Named Pages

Named Pages

Search

ADD NAMED PAGE

Page Name	URL	Starred	Delete
Add a Goal	Click:goal https://secure.cubevibe.com/goals	☆	🗑️
Add New Metric	https://secure.cubevibe.com/metrics/metrics/new	☆	🗑️
Admin Help	https://secure.cubevibe.com/admin/help	☆	🗑️
Brightree Webinar - Training	http://grantland.com/	☆	🗑️
https://secure2.useriq.com/#/named_pages	https://secure.cubevibe.com/home	★	🗑️

Then, type your desired name in the left text field and type the URL of the corresponding page of your web app.

Named Pages

Search

Page Name	URL	Starred	Delete
Add a Goal	Click:goal https://secure.cubevibe.com/goals	☆	🗑️
Add New Metric	https://secure.cubevibe.com/metrics/metrics/new	☆	🗑️
Admin Help	https://secure.cubevibe.com/admin/help	☆	🗑️
Brightree Webinar - Training	http://grantland.com/	☆	🗑️
CubeVibe Home	https://secure.cubevibe.com/home	★	🗑️

You can also name pages within your app. Open UserIQ, and in a separate tab, go to page of your web app that you want to name. At the bottom right, you should see the UserIQ Bubble. Click on the Bubble.

The screenshot shows the UserIQ dashboard for Aaron Aycock. It features a navigation bar with 'MEETINGS', 'GOALS', 'METRICS', 'FEEDBACK', and 'REVIEWS'. The main content area is titled 'Dashboard' and includes a 'Public Scorecards' list, a 'Metric Status by Scorecard' bar chart, and a 'You might also want to' section with a 'UserIQ' bubble at the bottom right.

Scorecard	On Track	Warning	Alert
Operate Efficiently	7.5	0	1.5
Production Stability	6.5	0	1.5
Develop Great Products	0	0	0
Satisfy Employees	0	0	0
Grow Revenue	0	0	0
Satisfy Clients	0	0	0
2013 Success Criteria	0	0	0

This will open a sidebar. Click on the PAGES tab at the top of the sidebar.

The screenshot shows the CUBEVIBE dashboard interface. At the top, there is a navigation bar with the CUBEVIBE logo, a user profile for 'Aaron Aycock', and links for 'My profile', 'Get Help', and 'Logout'. Below this is a secondary navigation bar with 'Home' and 'metrics' tabs. The main content area is divided into four sections: 'MEETINGS' (Plan for Productivity), 'GOALS' (Set your direction), 'METRICS' (Track your progress), and 'FEEDBACK' (Share your thoughts). The 'METRICS' section is active, displaying a 'Dashboard' with the instruction 'You can start by adding metrics to your scorecard.' On the left, there is a list of 'Public Scorecards' including 'Operate Efficiently', 'Production Stability', 'Develop Great Products', 'Satisfy Employees', 'Grow Revenue', 'Satisfy Clients', and '2013 Success Criteria'. A 'Create New Scorecard' button is located below this list. The central part of the dashboard features a bar chart titled 'Metric Status by Scorecard' showing the total metrics for each scorecard, categorized by status: Alert (red), Warning (yellow), and On Track (green). The chart shows that 'Operate Efficiently' and 'Production Stability' have the highest total metrics, with 'Operate Efficiently' having the most 'Alert' status metrics. A callout box on the right of the chart suggests discussing metrics in the next 1:1 meeting and provides a link to 'Add meeting notes'. The sidebar on the right contains a red 'Add Tour to Page' button and a 'UIQ' logo at the bottom.

Scorecard	On Track	Warning	Alert	Total
Operate Efficiently	7	0	2	9
Production Stability	6	0	2	8
Develop Great Products	0	0	0	0
Satisfy Employees	0	0	0	0
Grow Revenue	0	0	0	0
Satisfy Clients	0	0	0	0
2013 Success Criteria	0	0	0	0

Finally, name the page appropriately. This page is the Metrics page, so it is named Metrics.

Starred Pages

On the Named Pages section, click on the white star to Star a page. Starred pages have a black star.

Track a feature’s usage by starring the page. Only Starred pages are tracked in the Usage by Account page.

Wildcarding URLs

If a page of your web app has a user specific URL, the URL can be wildcarded so that announcements, tours, engagements or other features can still be used. Replace the variable part of the url with an asterisk when naming pages or assigning engagements.

Example: testpage.com/home/johndoe26 vs testpage.com/home/*johndoe26.testpage.com/payment/ vs *.testpage.com/payment/

Live Feed

Description of what Live Feed does and include picture from Cubevibe.

See all the activity taking place in your web app. Shows the users, the action they took on the page and on which page. Doesn't track any data other than event, no text, etc.

Usage by Accounts

Usage by accounts tracks the number of times a named page is visited by your accounts, sorted from most frequent user to least frequent user. The feature is selected from the checklist on the right side. Multiple features can be selected and the results can be compared.

Account Health

Account Health can be viewed in the dashboard or from secure.useriq.com/*/!/dashboard. An account's health is defined by the frequency of use and the installation status of the current software.

Using the Dashboard

The new UserIQ dashboard provides at-a-glance health and usage stats of your accounts based on parameters you have previously set up. These include last login, feature usage, credit card validity, payment status and number of users.

UserIQ Features

In-App Engagements

By using custom variables and user segmentation, in-application engagements can be perfectly tailored to an individual level to provide a really personalized experience for users. Effective, tailored engagements can be used to turn regular users into power users and to upsell them.

There are five different kinds of in-application engagements. They are Announcements, NPS Surveys, Ratings Surveys, Custom Surveys and Guided Tours. Announcements can be used to describe new features or to share important notices. Surveys can be used to find user sentiment. Guided Tours can be used to teach or re-teach how to use software.

What are engagements?

User Engagements are modal windows that appear on a user's browser window while they use your web app. They can be used to call to action, inform, gather

sentiment, learn, or to instruct. UserIQ provides announcements, surveys, and instructional tours.

Branding and Themes

Before creating an engagement, it is important to create a theme that fits with your company branding. First, carefully examine your site. What color do you use for your header? What color is your logo? What color is your call-to-action button? Find the hex value of your colors by using a photo editing app or the inspect feature of your browser. Tours and Modals use different colors, so be sure to create branded themes for each. Modals and NPS surveys use the same color scheme, but NPS surveys also require theming for bubble colors.

How to create Themes

First, carefully examine your website or review your company style guide. Note the primary, secondary, tertiary colors and the color of your call to action. Also, notice that TechCrunch uses sharp corners for its buttons. Use the color picker app of your choice or consult your company style guide to find the hex value of these colors.

Primary Color: **Green**, #0a9e22

Secondary Color: **Dark Green**, #0f4a0a

Tertiary Color: **Gray**, #d2d3d2

Call to Action: **Dark Gray**, #3e433e

Next, go to the setup button on the top menu bar and click on CAMPAIGN THEMES. This will open the theme list. Click on CREATE A THEME.

Campaign Themes
Named Pages

CREATE A THEME

Theme List

Name	Default	Duplicate	Read Only	Delete
Default Created By: Yido Jang	<input type="checkbox"/>			
Test Theme 2 Created By: Yido Jang	<input type="checkbox"/>			
HMills Theme Created By: Yido Jang	<input type="checkbox"/>			
Welcome Mock-Up Theme Created By: Yido Jang	<input type="checkbox"/>			

In this example, the primary color has been set as the header, the tertiary color was set as the left button and the call to action color was set as the right button. The border radius was kept square.

Guided Tour Example

Theme Name: TechCrunch [SAVE](#)
[THEME LIST](#)

Preview

Please note: Custom CSS rules are not applied to preview while using the Style Editor

Welcome to UserIQ

Welcome to UserIQ
Please use the menu on the right to style this in app message to match your website or application's branding.

BUTTON - LEFT
BUTTON - RIGHT

Style Editor

TOUR GUIDE MODAL NPS SURVEY

Tour Border Radius: 0px

Header Background Color: #0a9e22

Header Text Color: #ffffff

Header Text Font Size: Select a Value

Header Dismiss Button Color: #ffffff Include Dismiss Button:

Left Button Background Color: #d2d3d2

Left Button Text Color: #000000

Left Button Border Radius: 0px

Right Button Background Color: #3e433e

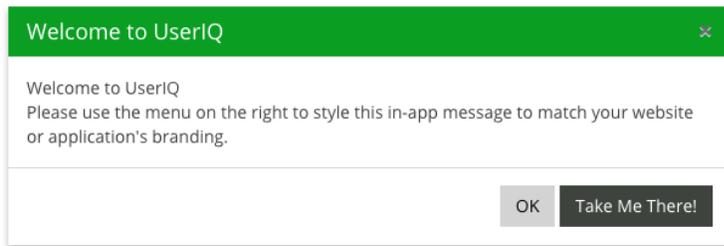
Right Button Text Color: #ffffff

Right Button Border Radius: 0px

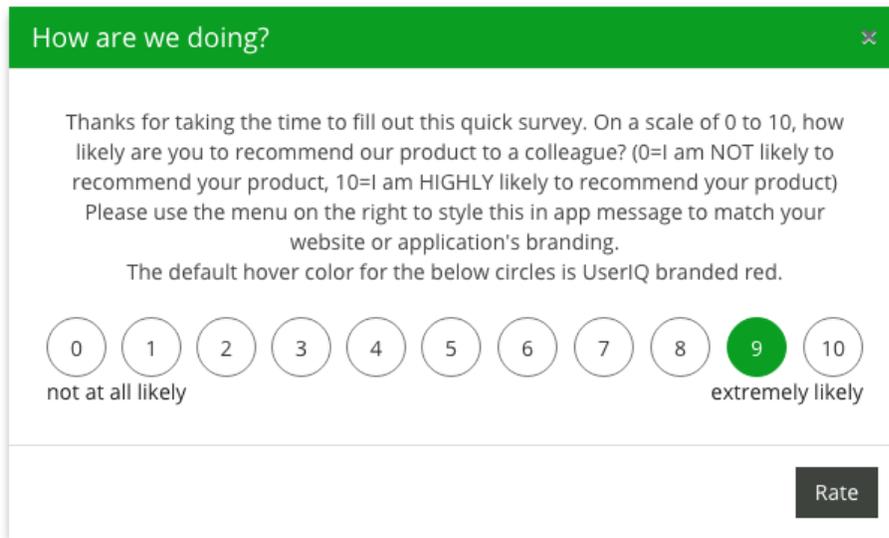
[SAVE](#)

CUSTOM CSS

Modal Example



NPS Example



How are we doing? ✕

Thanks for taking the time to fill out this quick survey. On a scale of 0 to 10, how likely are you to recommend our product to a colleague? (0=I am NOT likely to recommend your product, 10=I am HIGHLY likely to recommend your product)
Please use the menu on the right to style this in app message to match your website or application's branding.
The default hover color for the below circles is UserIQ branded red.

0 1 2 3 4 5 6 7 8 9 10
not at all likely extremely likely

Rate

Announcements

Announcements are modals with a single call to action. This CTA can be to learn more about a feature or inform users.

Announcements are created in the CREATE CAMPAIGN tab under CAMPAIGN. After giving an announcement a title, header and content, the announcement should be added to a specific Named Page so that it appears when it is relevant.

[Images that are included in announcements can be modified to represent the TakeRight action.](#)

[It is recommended that images in announcements be no larger than 350 pixels tall.](#)

NPS Survey/Ratings Survey/Custom Survey

Use NPS Surveys right after a crucial process in order to find user sentiment about your product. NPS Surveys are modals, just like Announcements. After the content is written, select the appropriate Named Page to show the survey.

Ratings Surveys use stars in order to gather user sentiment. Ratings Surveys are preferable for feedback about specific features or experiences within your web app.

Custom Surveys can be constructed with radio buttons, checkboxes or comment boxes to gather user feedback or answer questions about their behaviour that might not be actively tracked.

Guided Tours

Use Guided Tours in order to teach users how to use features of your web app, to re-teach users or to draw attention to specific elements. It is important to plan a Guided Tour before creating one in order to design an effective guided tour. Open your web app and, in a separate tab, open the UserIQ app also. When you see the black UserIQ Bubble, click on it and then click on CREATE NEW TOUR. UserIQ uses a point and click tour step creation. First, click on the element you want a tour step to point to. You should see a red square around the element. Then, select the relative position of the tour step, such as bottom right. Do this as many times as needed for your guided tour. Don't worry about the names or the content; these can all be changed in the content editor.

When designing a guided tour, determine your objective. Is it to teach how to use a feature? Is it to draw attention to a new feature? It is best to keep a tour as simple as possible with as few words and as few steps as possible. It is also best to minimize the use of buttons and instead to focus on click events. This encourages muscle memory growth and the direct interaction will foster long term usage.

Multi-page tours can be made by making multiple tours on different pages, then linking them together. Tours can be linked with the LINK button action. This will take the user directly to the linked tour by name. Another way is to take the user to the appropriate page, then setting up the audience filter to only show the second tour to people who have seen the first. This way, users are not confused by the second half of a mystery tour.

Guided tours can also be directly linked to by suffixing the tour number of the tour to the corresponding URL of your web app.

Deleting campaigns

Delete campaigns by archiving them, then opening up the archive and deleting them from there. This makes it less likely to irreversibly delete past campaigns.

Setting up A/Not A testing

A/Not A testing can be selected by choosing this option in the audience filter of any campaign. This option only shows the selected campaign to 50% of all users that fit the audience filter. A/B testing can be accomplished by showing all users who did not see the A/Not A campaign a different campaign.

Tracking Goals

Target user goals can be set up by creating a new segment of users that fit the target audience and then selecting that segment in the engagement creation/editing page. There, you will select the number of people you would like to show this engagement to.

Engagement Priority

Engagements are shown in the order they are in in the VIEW CAMPAIGNS page. So, if there is a user on a page with multiple engagements, the top most engagement will be shown first, then the second at the next session, and so on.

Exporting Data

User Segment Data can be exported, Account Usage and Engagement data. User lists cannot be exported

Appendix

Resource 1

<http://support.useriq.com>