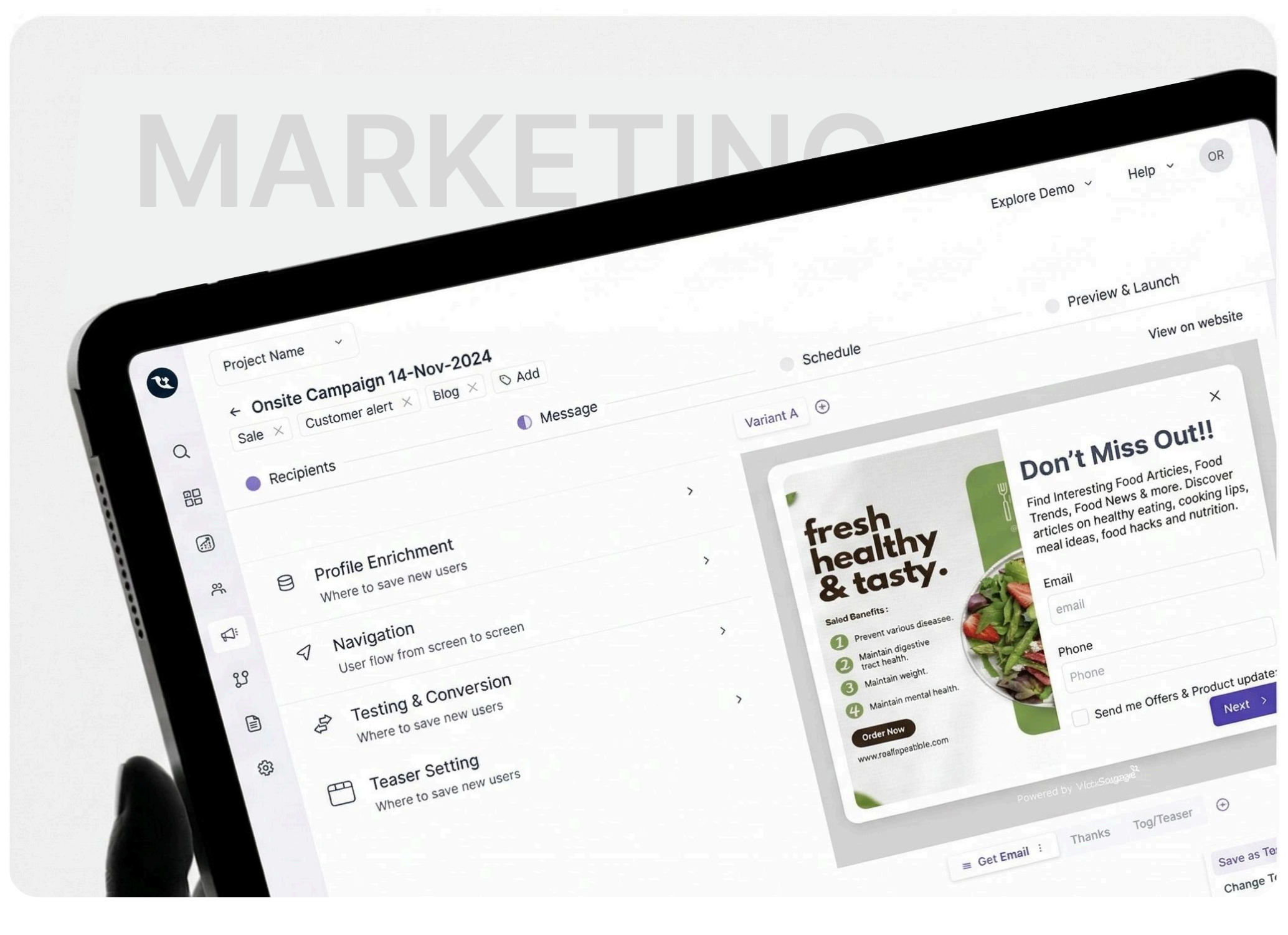
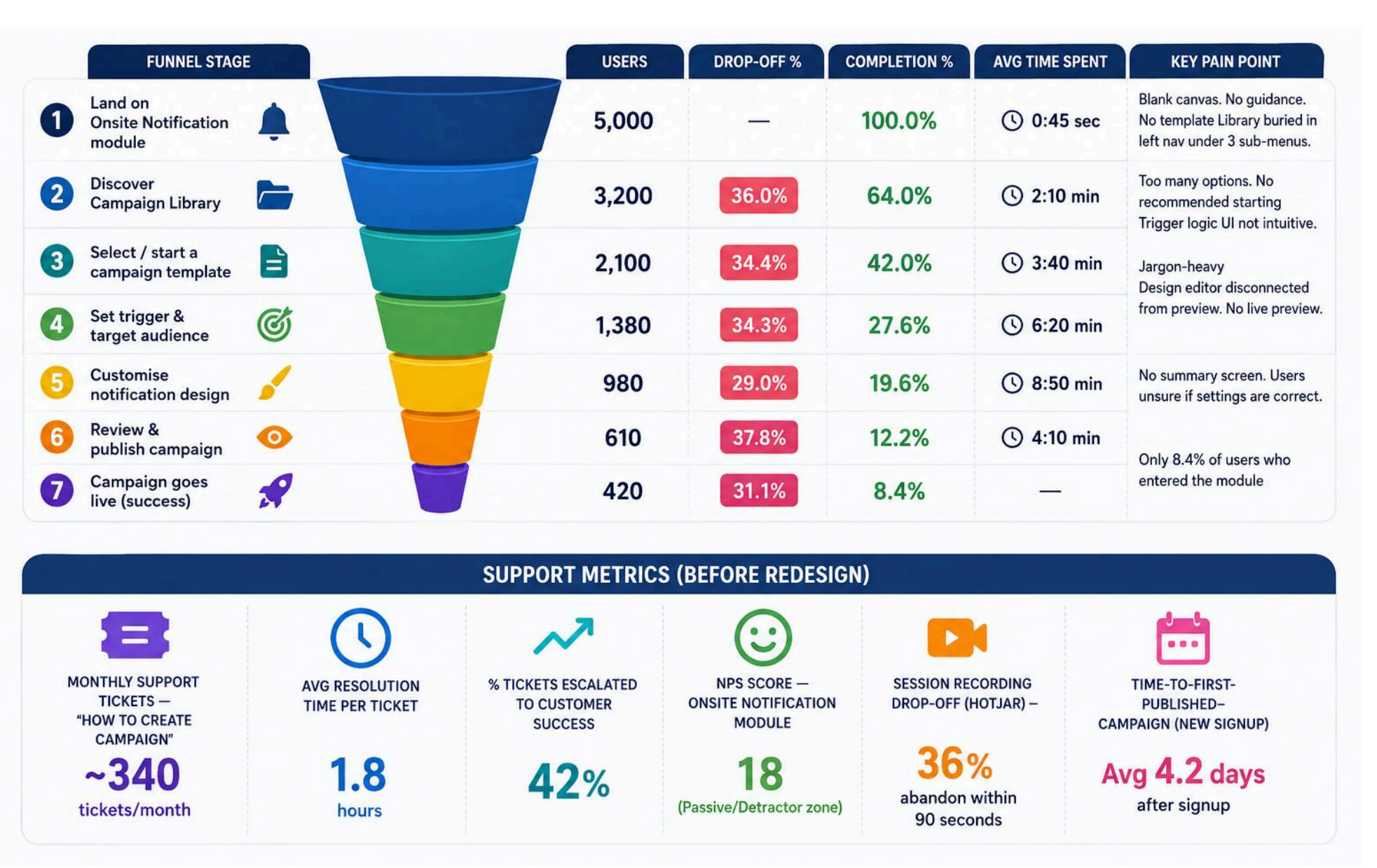


On-site notifications in WebEngage are messages that appear directly on a website to engage visitors in real time. ***These notifications help businesses communicate with users*** through formats like banners, pop-ups, modals, or callouts. They are commonly used to promote offers, guide users, collect feedback, or highlight important information while users are browsing the website.

Project / SaaS-Onsite Notification, Revamp
Category / web App (Desktop-First, responsive)
Date/ 2025

Feature Improvement
UX Research
Analysis
Prototype
Testing
UI Design

RESEARCH



	FUNNEL STAGE	USERS	DROP-OFF %	COMPLETION %	AVG TIME SPENT	KEY PAIN POINT
1	Land on Onsite Notification module	5,000	—	100.0%	0:45 sec	Blank canvas. No guidance. No template Library buried in left nav under 3 sub-menus.
2	Discover Campaign Library	3,200	36.0%	64.0%	2:10 min	Too many options. No recommended starting Trigger logic UI not intuitive.
3	Select / start a campaign template	2,100	34.4%	42.0%	3:40 min	Jargon-heavy Design editor disconnected from preview. No live preview.
4	Set trigger & target audience	1,380	34.3%	27.6%	6:20 min	
5	Customise notification design	980	29.0%	19.6%	8:50 min	No summary screen. Users unsure if settings are correct.
6	Review & publish campaign	610	37.8%	12.2%	4:10 min	Only 8.4% of users who entered the module
7	Campaign goes live (success)	420	31.1%	8.4%	—	

SUPPORT METRICS (BEFORE REDESIGN)

MONTHLY SUPPORT TICKETS — "HOW TO CREATE CAMPAIGN"	AVG RESOLUTION TIME PER TICKET	% TICKETS ESCALATED TO CUSTOMER SUCCESS	NPS SCORE — ONSITE NOTIFICATION MODULE	SESSION RECORDING DROP-OFF (HOTJAR) –	TIME-TO-FIRST-PUBLISHED–CAMPAIGN (NEW SIGNUP)
~340 tickets/month	1.8 hours	42%	18 (Passive/Detractor zone)	36% abandon within 90 seconds	Avg 4.2 days after signup

RESEARCH FINDING

PROBLEM STATEMENT

Users creating on-site notifications in WebEngage faced significant usability challenges due to a complex and unintuitive interface.
The workflow required users to configure multiple parameters such as trigger conditions, audience targeting, and message settings, but these options were not clearly structured or explained within the interface. As a result, users often struggled to understand:

- When the notification would trigger
- Who the notification would target
- How different conditions interacted with each other

Additionally, the layout and information hierarchy made it difficult for users to follow the creation flow, causing confusion during setup.
Because of these issues, users took longer to configure campaigns, frequently made configuration errors, and often relied on support or documentation to complete tasks that should have been straightforward.

Users & their needs

Quickly choose the right notification format
Users need to select a layout based on their campaign goal (header bar, modal, banner, callout, etc.) so they can match the message with the right placement on the website.

Easily create and edit notification content
Users need a simple way to add title, description, CTA text, and links so they can communicate offers, announcements, or updates to website visitors.

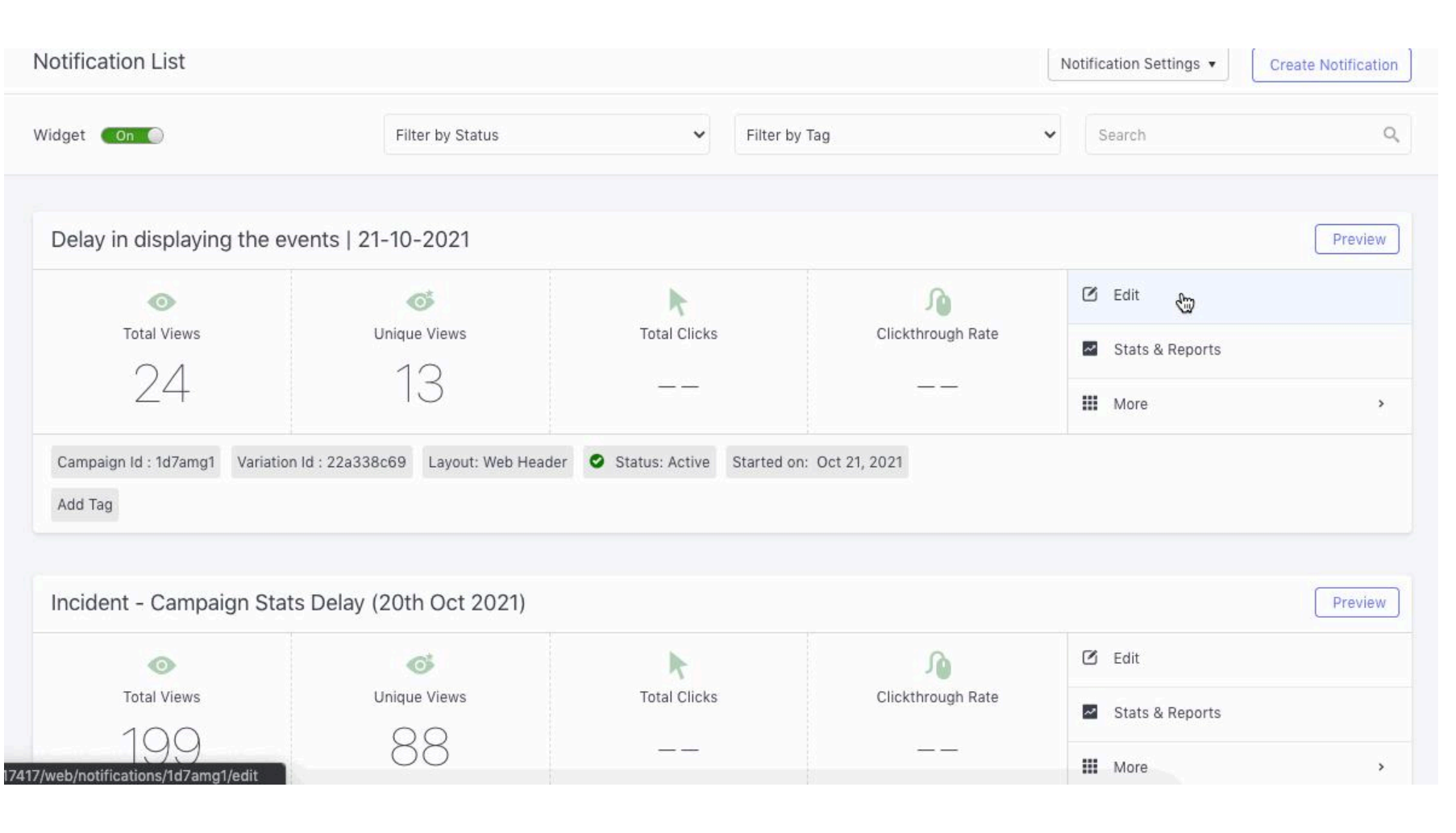
Customize the notification design
Users want to adjust icon style, alignment, background image, and theme to ensure the notification matches their brand and looks visually appealing.

Control how the notification appears on the website
Users need options like fixed position, overlay vs push-down behavior, and placement so the notification doesn't disrupt the user experience.

Upload assets and preview before launching
Users need to upload images/icons and preview the notification to make sure the message looks correct before activating the campaign.

To reach more relevant users.
Users need options like fixed position, overlay vs push-down behavior, and placement so the notification doesn't disrupt the user experience.

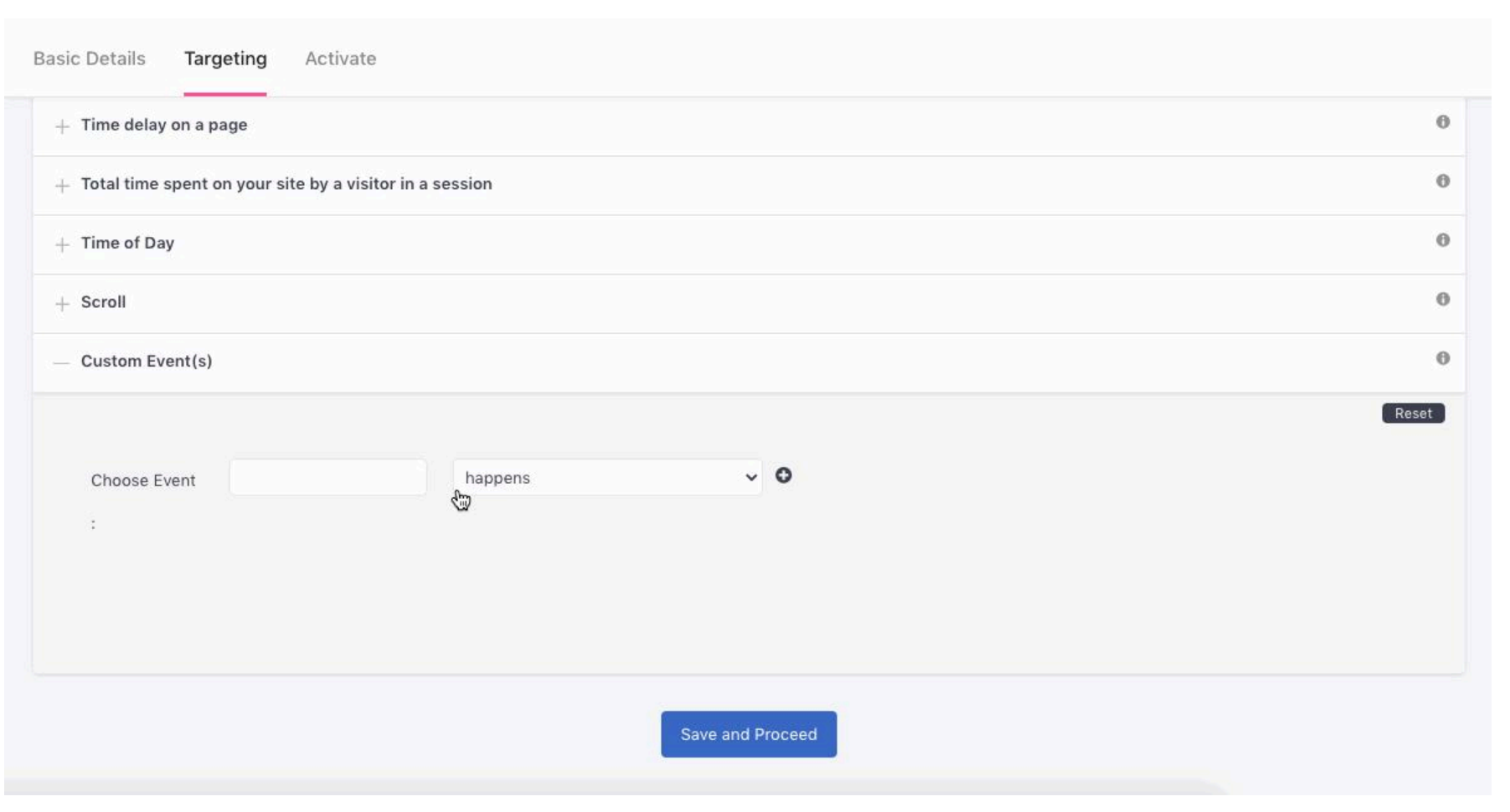
Old Product



Notification List
Notification Settings
Create Notification
Widget On
Filter by Status
Filter by Tag
Search

Delay in displaying the events | 21-10-2021
Total Views 24
Unique Views 13
Total Clicks – –
Clickthrough Rate – –
Edit
Stats & Reports
More
Campaign Id : 1d7amg1
Variation Id : 22a338c69
Layout: Web Header
Status: Active
Started on: Oct 21, 2021
Add Tag

Incident - Campaign Stats Delay (20th Oct 2021)
Total Views 199
Unique Views 88
Total Clicks – –
Clickthrough Rate – –

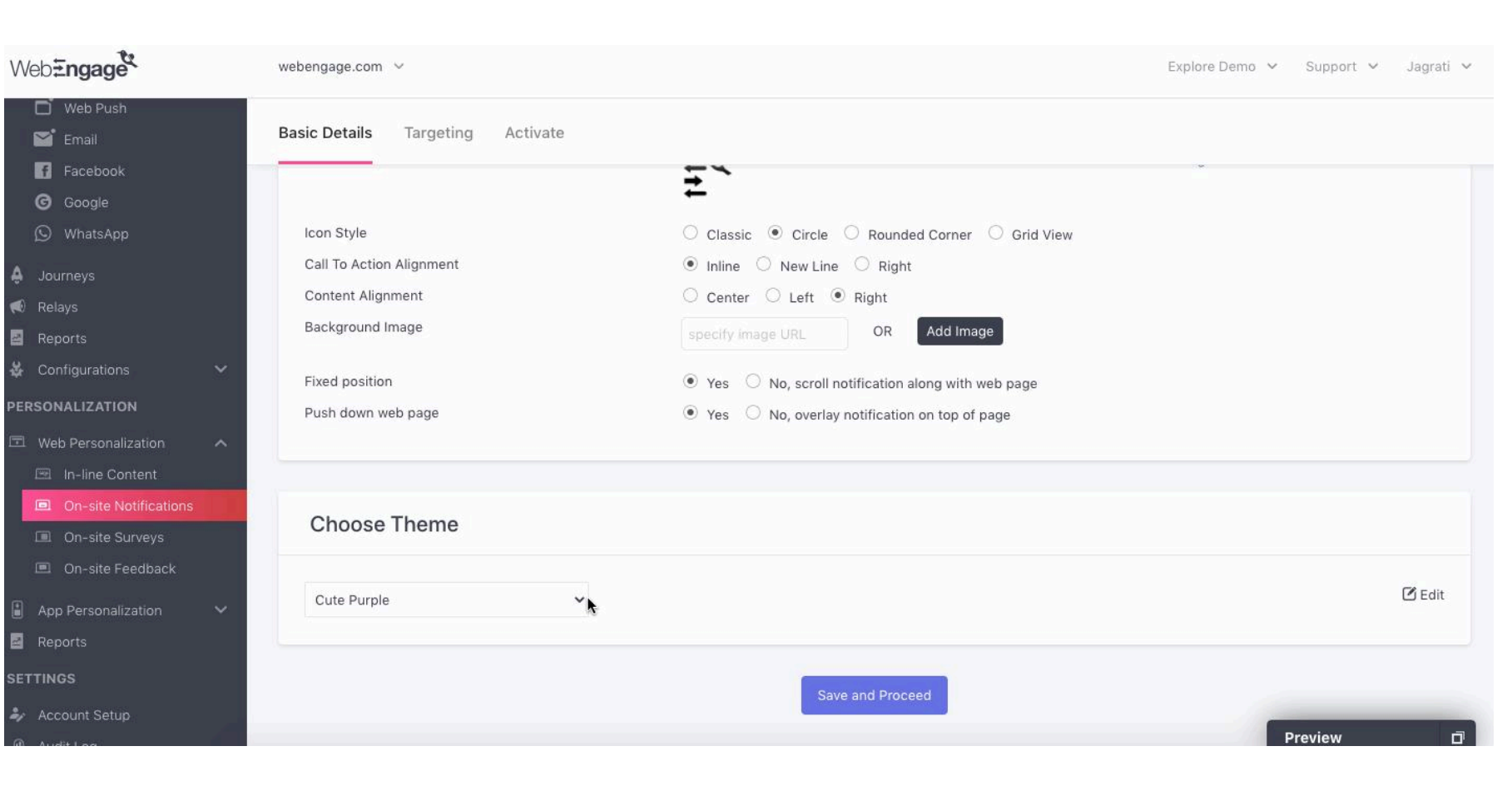


Basic Details | Targeting | Activate

- Time delay on a page
- Total time spent on your site by a visitor in a session
- Time of Day
- Scroll
- Custom Event(s)

Choose Event | happens

Reset
Save and Proceed



Basic Details | Targeting | Activate

Icon Style: Classic, ● Circle, Rounded Corner, Grid View
Call To Action Alignment: ● Inline, New Line, Right
Content Alignment: Center, Left, ● Right
Background Image: specify image URL OR Add Image
Fixed position: ● Yes, No, scroll notification along with web page
Push down web page: ● Yes, No, overlay notification on top of page

Choose Theme
Cute Purple
Save and Proceed

Constraints & roadblocks

Limited budget: As we were revamping the entire product, all projects required strict prioritization.

Aggressive timeline: 1. Black Friday hard deadline 2 months The project had a fixed, non-negotiable launch window tied to Black Friday. This compressed a full redesign cycle into 8 weeks meaning we had to ruthlessly prioritise which UX problems to solve in this sprint versus defer to Q2. We couldn't boil the ocean; we had to identify the highest drop-off points and fix those first.

High volume of user requests: More than 30+ users had specifically requested improvements to the on-site notification feature.

Competitive Analysis

	WebEngage	CleverTap	moengage	omnisend	klaviyo
Behavior-based Targeting	✓	✓	✓	✓	⚠ Basic
Audience Segmentation	✓	✓	✓	⚠ Basic	✓
Real-time Analytics / Conversion Tracking	✓	✓	✓	✓	✓
Profile enrichment	✓	✓	✓	⚠ Limited	⚠ Limited
Pre-built Templates	✓ 100+	✓	✓	✓	✓
Visual editors	⚠ Limited	✓	✓	✓	✓
Journey Automation / Triggers	✓	✓	✓	✓	✓
Personalization	✓	✓	✓	✓	⚠ Limited
AI Recommendations / Predictive Targeting	⚠ Limited	✓	✓	⚠ Limited	✓
AI Send-time / Optimization	⚠ Limited	✓	✓	⚠ Limited	✓

WebEngage

Pro.
- Strong segmentation and user targeting
- Supports multi-channel campaigns
- Good real-time analytics and tracking
- Powerful behavior-based automation

Cons.
- Campaign builder can feel complex for new marketers
- Layout selection are not very intuitive
- Limited visual editing capability

CleverTap

Pro.
- Powerful AI engine (predictive segmentation, churn analysis)
- Strong user profile system for personalization
- Provides visual editor for website personalization
- Good analytics and customer journey tracking

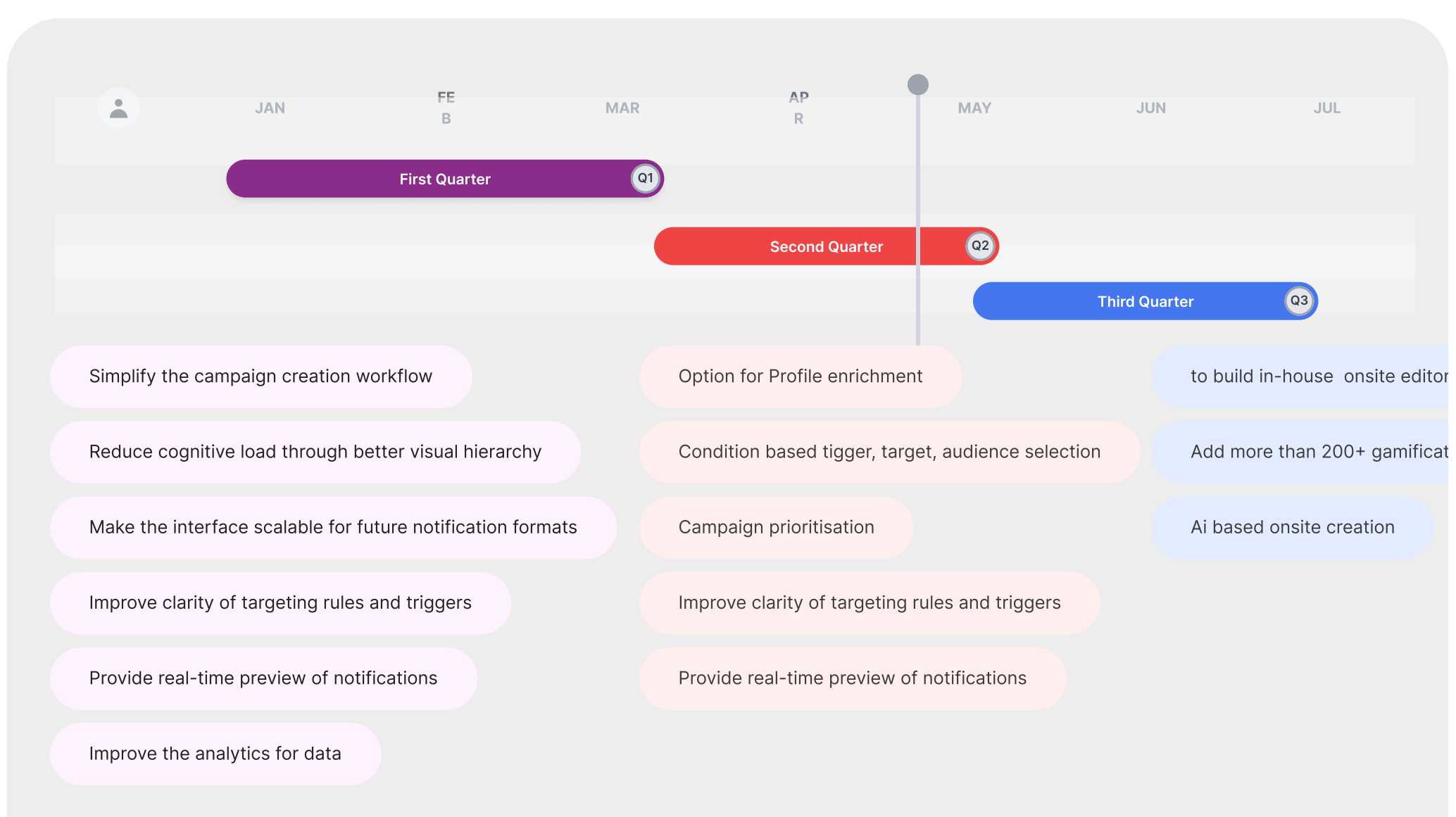
Cons.
- UI can feel data-heavy and complex
- Campaign setup sometimes requires technical understanding
- Fewer design customization options compared to design-focused tools

moengage

Pro.
- Drag-and-drop visual editor for campaigns
- Strong AI engine (Sherpa AI) for send-time optimization and recommendations
- Good templates and personalization options
- Supports cross-channel engagement

Cons.
- Dashboard can feel overloaded with features
- Some advanced targeting requires technical setup
- Custom design flexibility may require developer support

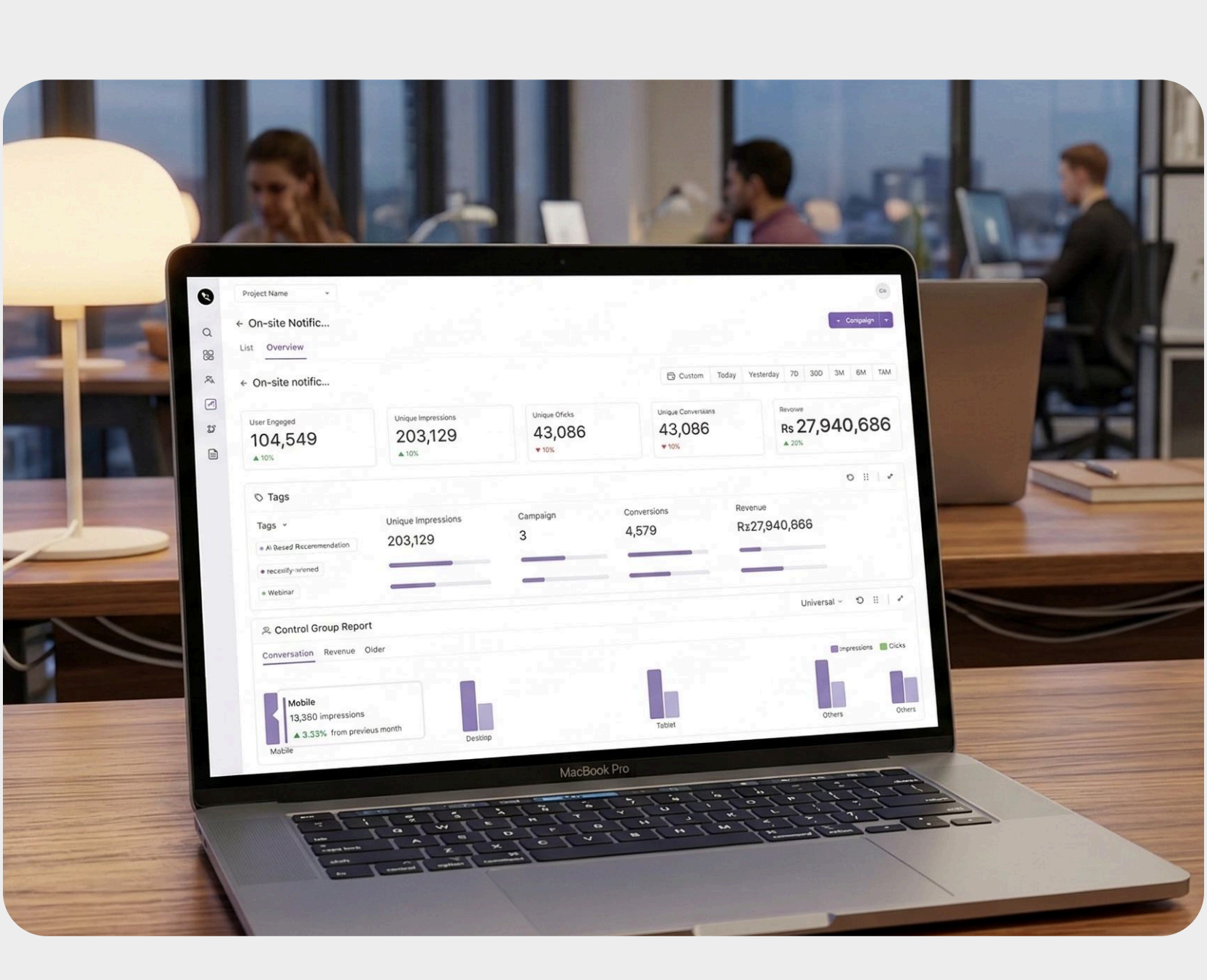
Design solution



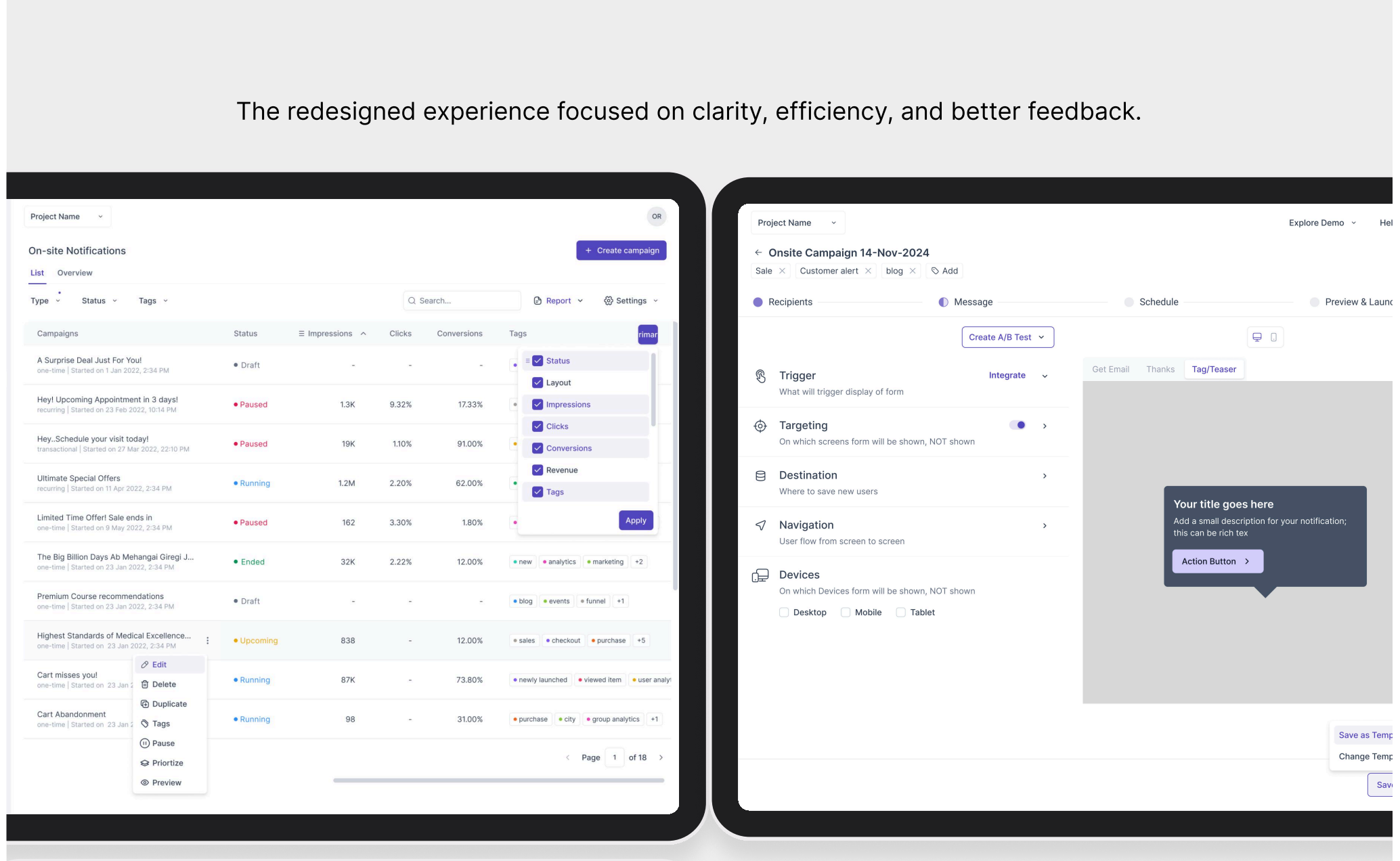
- Simplify the campaign creation workflow
- Reduce cognitive load through better visual hierarchy
- Make the interface scalable for future notification formats
- Improve clarity of targeting rules and triggers
- Provide real-time preview of notifications
- Improve the analytics for data

- Option for Profile enrichment
- Condition based tigger, target, audience selection
- Campaign prioritisation
- Improve clarity of targeting rules and triggers
- Provide real-time preview of notifications

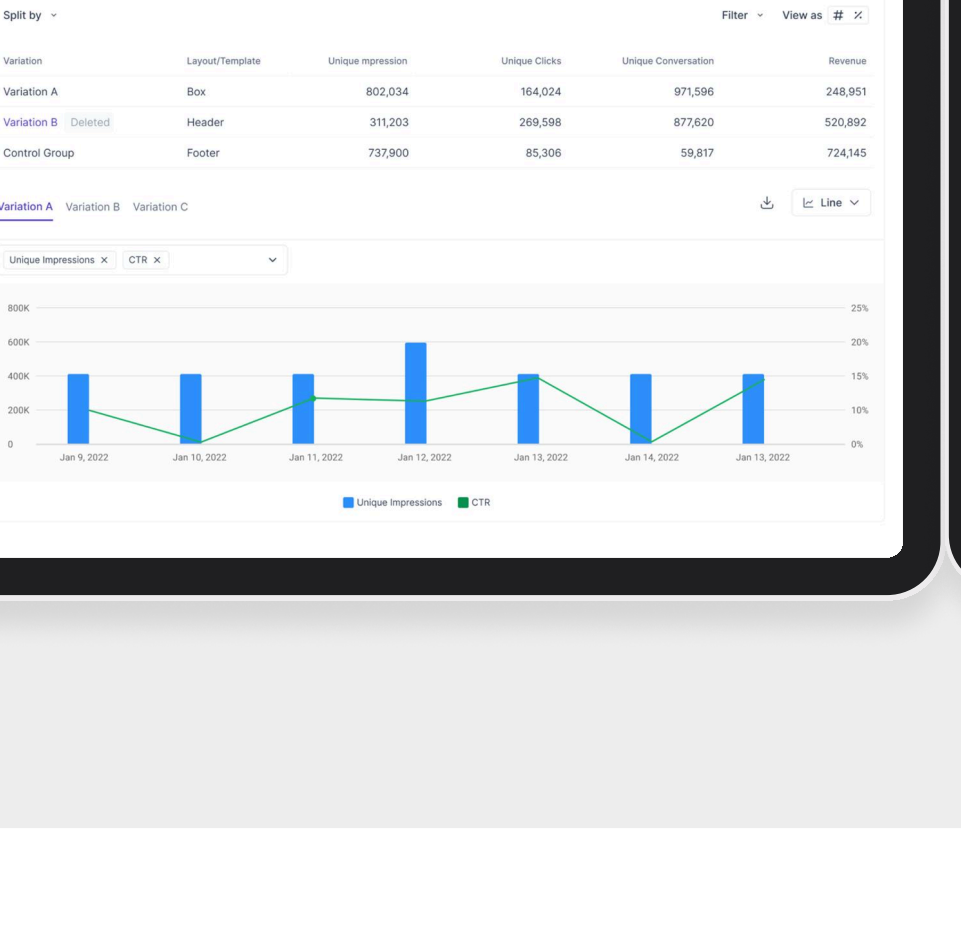
- to build in-house onsite editor
- Add more than 200+ gamificat
- Ai based onsite creation



The redesigned experience focused on clarity, efficiency, and better feedback.



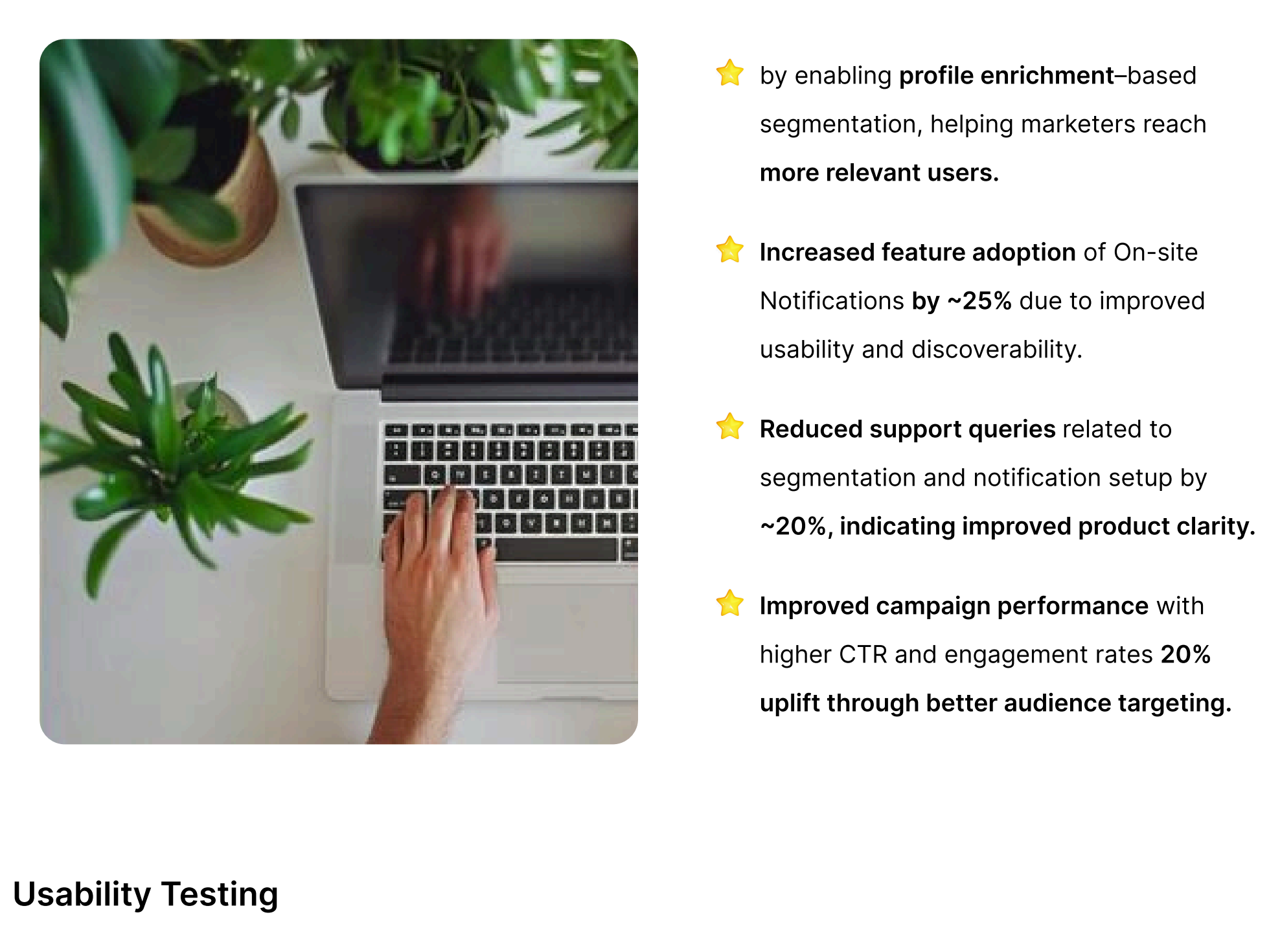
Impact



- by enabling **profile enrichment**–based segmentation, helping marketers reach **more relevant users.**
- **Increased feature adoption** of On-site Notifications **by ~25%** due to improved usability and discoverability.
- **Reduced support queries** related to segmentation and notification setup by **~20%, indicating improved product clarity.**
- **Improved campaign performance** with higher CTR and engagement rates **20% uplift through better audience targeting.**

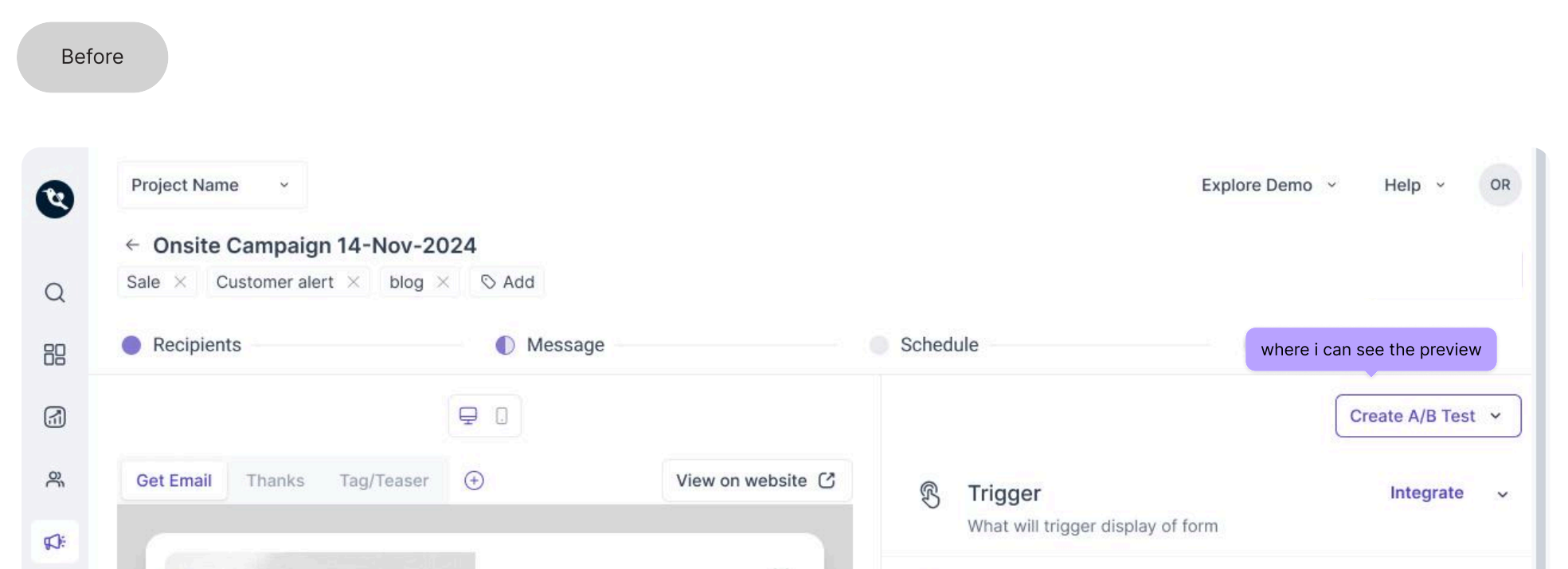
Usability Testing

Before



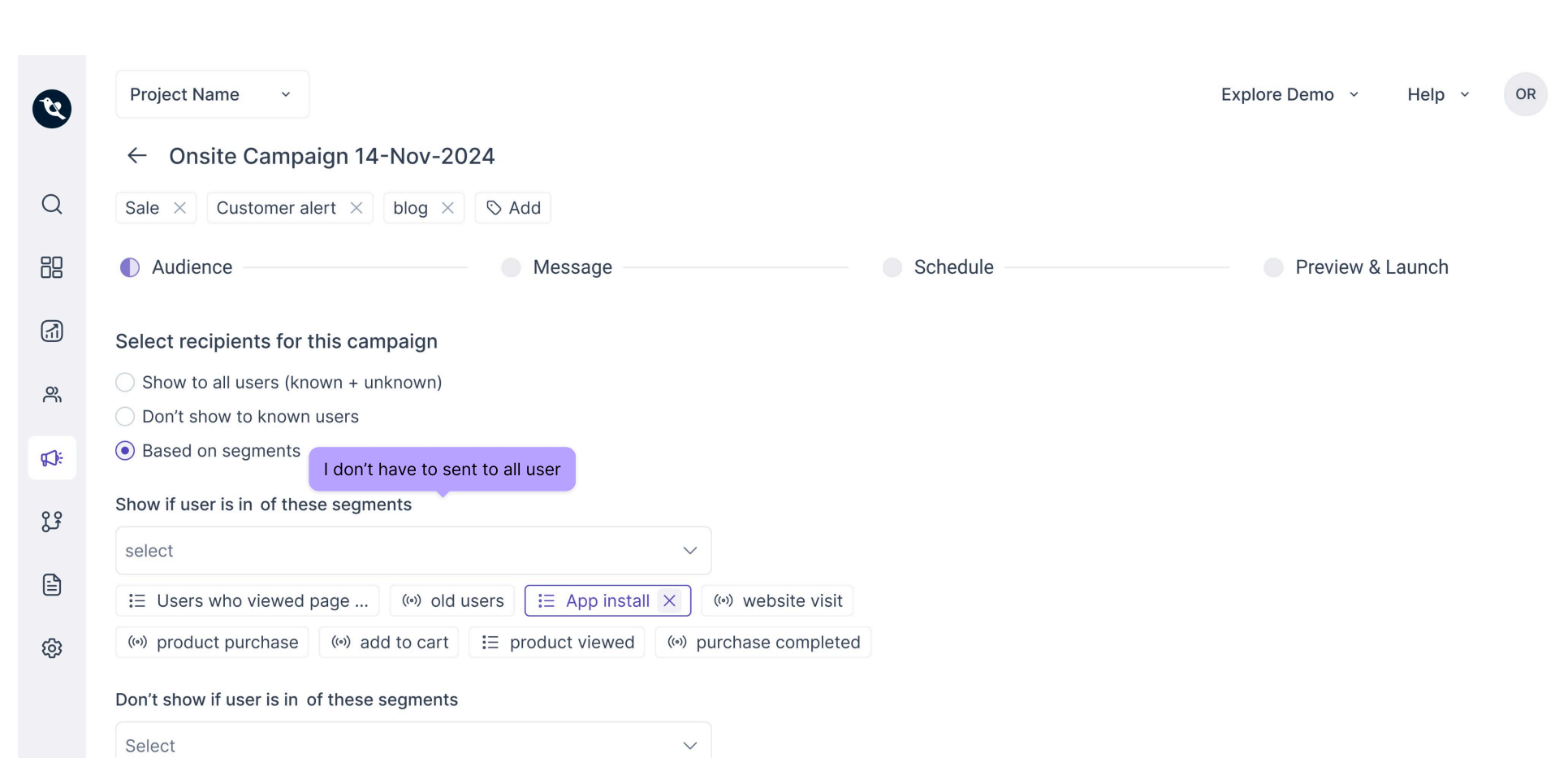
where i can see the preview
where i can find the settings
where is the option for teaser

After



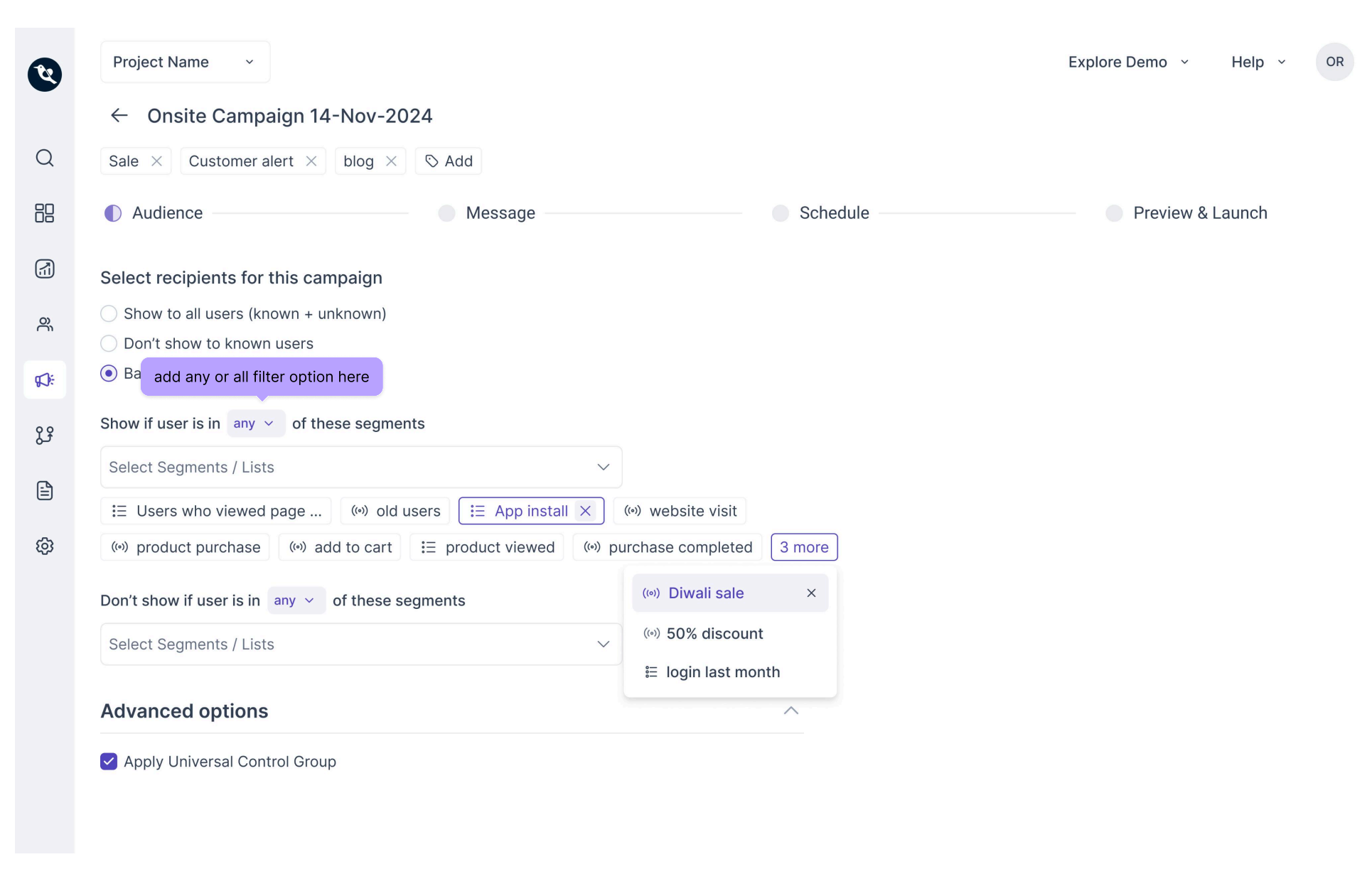
Introduced a "+" button to enable users to quickly create a new variant.
Repositioned the settings to improve visibility
Create teaser setting option upfront

Before



Select recipients for this campaign
○ Show to all users (known + unknown)
○ Don't show to known users
● Based on segments
I don't have to sent to all user
Show if user is in of these segments
Don't show if user is in of these segments

After



Select recipients for this campaign
○ Show to all users (known + unknown)
○ Don't show to known users
● Ba
add any or all filter option here
Show if user is in any of these segments
Don't show if user is in any of these segments
Advanced options
☑ Apply Universal Control Group

Learnings & growth

This project was a strong learning experience and highlighted a few important growth points:
Simplifying complex workflows is critical in B2B tools. Clear information architecture and better organization can significantly reduce the time users spend finding and configuring campaign options.
User feedback should directly shape product improvements. Addressing requests from 30+ users helped prioritize the most valuable enhancements for the on-site notification feature.
Discoverability drives feature adoption. Improving UI clarity, reorganizing settings, and introducing easier actions (like quick variant creation) helps users launch campaigns faster and with less confusion.