

In-Product Learning Proof of Concept for Outreach Templates and Snippets

Overview

This generalized case study is based on an actual pilot-ready proof of concept I developed to explore how in-product learning could support users working with Templates and Snippets in Outreach.

The pilot was planned as a lightweight way to test contextual guidance inside the product experience. It was paused due to internal changes, including a shift in tooling, but the team intends to revisit the concept using a different digital adoption or in-app guidance platform.

For portfolio purposes, this case study uses only publicly available information from the Outreach Help Center and removes internal implementation details, unpublished strategy, stakeholder context, analytics, roadmap information, and proprietary workflows.

Public product context

Outreach Templates and Snippets both support faster, more consistent sales communication, but they serve different purposes.

Feature	Publicly available product context	Learner-friendly interpretation	Public source
Templates	Templates provide users with quick access to content frequently used in sequences, one-off emails, and single-compose emails.	Use a Template when you need a reusable starting point for a full email.	How To Configure an Outreach Template
Snippets	Snippets are small pieces of text or images used to help craft and personalize emails quickly. When added to an email, the Snippet is placed wherever the cursor is located.	Use a Snippet when you need to add a reusable piece of content into a message you are already writing.	How To Configure an Outreach Snippet
Variables	Outreach variables can be used when composing templates, snippets, single	Use variables when the message should automatically pull in	How do I see and select from the list of available

	emails, or bulk emails.	information about the prospect, sender, account, or another supported field.	Outreach variables?
Collections / content governance	Outreach publicly describes content governance as a way for admins to manage who can engage sequences, templates, and snippets through Collections and Teams.	Use Collections when content needs to be easier to find, organize, or govern by team, role, or use case.	How to Enable Outreach Content Governance

The challenge

Templates and Snippets are both reusable content tools, but users may not immediately understand when to use each one.

A traditional course or Help Center article can explain the difference, but users often need guidance at the moment they are composing an email, personalizing a message, building a sequence step, or choosing reusable content.

The challenge was to design a lightweight in-product learning experience that could help users:

- Understand the difference between Templates and Snippets
- Choose the right content type for the task
- Apply reusable content confidently inside the workflow
- Use public support resources when they need deeper help
- Build confidence without leaving the product experience

Key learning question

How can contextual in-product guidance help users understand, choose, and apply Templates and Snippets more effectively while they are working?

Audience

The proof of concept focused on customer-facing users and enablement partners who create, personalize, or manage reusable sales communication.

Audience	Likely need	In-product learning opportunity
Account executives	Quickly personalize outreach while maintaining quality and consistency.	Help users choose between a full-message Template and a smaller reusable Snippet.

XDRs / SDRs / BDRs	Move quickly through high-volume workflows while keeping messages relevant.	Provide quick guidance while composing or updating email content.
Managers	Support team consistency and adoption of approved content.	Reinforce when to use shared content and where to find it.
Admins / enablement partners	Help teams use reusable content correctly and consistently.	Connect users to public help resources, governance concepts, and content organization guidance.

Learning goals

The proof of concept was designed to help users:

Learning goal	What the user should be able to do
Distinguish	Explain the difference between a Template and a Snippet.
Choose	Select the right reusable content type based on the task.
Apply	Insert and customize content in a message or workflow.
Personalize	Recognize when variables or manual edits may be needed.
Troubleshoot	Know where to go if content is missing, variables are not working, or the wrong content appears.

Design strategy

I designed the experience around a layered learning model.

Layer	Purpose	Example experience
Awareness	Introduce the difference between Templates and Snippets.	A short tooltip or guide explaining when to use each content type.
Decision support	Help users choose the right option in context.	A side-by-side comparison card near the compose or content selection experience.
Application	Help users take action without leaving the workflow.	A short guided step that points users to the Template or Snippet picker.

Reinforcement	Support repeat use and reduce confusion.	A checklist or reminder that encourages users to review variables and personalize before sending.
Deeper help	Connect users to public documentation when they need more detail.	Links to relevant Outreach Help Center articles.

Proposed in-product flow

Step	User moment	In-app guidance goal	Suggested UI pattern	Relevant public Help Center link
1	User enters an email composition or reusable content workflow.	Introduce the idea that Templates and Snippets support different content needs.	Tooltip, guide launcher, or small welcome card	Outreach Glossary
2	User sees Template and Snippet options.	Clarify the difference between a full reusable email and a reusable content block.	Side-by-side comparison card	How To Configure an Outreach Template and How To Configure an Outreach Snippet
3	User selects or applies a Template.	Remind the user to review the message before using it.	Inline checklist	How To Add Outreach Templates in Gmail
4	User selects or applies a Snippet.	Explain that the Snippet is inserted where the cursor is placed.	Contextual tooltip	How To Configure an Outreach Snippet
5	User works with variables.	Reinforce the need to review variable formatting and population before sending.	Review reminder or validation prompt	Outreach Variables Overview and Why are my variables not populating in my test preview?
6	User cannot find expected content.	Route the user to troubleshooting guidance.	Help link or expandable support card	Why are my templates & snippets not appearing in my search when adding to an email or sequence?

7	User needs team-specific or approved content.	Explain that content may be governed or organized by Collections and Teams.	“Find approved content” help card	How to Enable Outreach Content Governance
8	User is building or editing a sequence step.	Show how reusable content can support sequence email workflows.	Contextual guidance inside sequence step workflow	How to add a template to a sequence step?

Suggested in-app copy

Placement	Trigger or moment	Draft in-app copy	Help Center link
Guide intro	User opens the contextual guide.	Templates and Snippets both help you reuse content, but they work differently. This quick guide can help you choose the right one.	None
Template tooltip	User hovers over or selects Templates.	Use a Template when you want a reusable starting point for a full email. Review the subject, body, and personalization before using it.	How To Configure an Outreach Template
Snippet tooltip	User hovers over or selects Snippets.	Use a Snippet when you want to add a smaller reusable block of text or an image into the message you are already writing.	How To Configure an Outreach Snippet
Cursor reminder	User opens Snippets from a compose area.	Snippets are inserted where your cursor is placed. Click into the message where you want the content to appear before adding one.	How To Configure an Outreach Snippet
Decision card	User opens guidance from a help launcher.	Need a full email? Start with a Template. Need a reusable phrase, paragraph, image, or	How To Configure an Outreach Template and How To Configure

		answer? Add a Snippet.	an Outreach Snippet
Variables reminder	User inserts reusable content with variables.	Before sending, check that variables are populated and the message still sounds personal.	How do I see and select from the list of available Outreach variables?
Variable troubleshooting	User previews or tests content and variables do not appear correctly.	If variables are not populating, check formatting and make sure the needed field information exists before using the message.	Why are my variables not populating in my test preview?
Missing content help	User searches for a Template or Snippet and cannot find it.	If expected content is not appearing, check browser setup, access path, available permissions, or content organization.	Why are my templates & snippets not appearing in my search when adding to an email or sequence?
Collection note	User is looking for team-specific content.	Some content may be organized by Collection. Use available filters or dropdowns to find content for your team or workflow.	How to Enable Outreach Content Governance
Copy/paste reminder	User pastes content into a message or template.	Pasted content may bring hidden formatting with it. Review spacing, links, and formatting before saving or sending.	Can you copy and paste into a message or template?

Suggested screenshot and visual plan

For portfolio safety, I would use original visuals rather than Outreach screenshots. The goal is to show the learning design pattern, not expose or reproduce product UI.

Visual	What to show	How to create it safely	Suggested caption
Visual 1: Workflow map	A simple diagram showing where in-product guidance appears in the user journey.	Create a generic flowchart in Figma, Canva, or PowerPoint.	"Workflow map showing where contextual guidance could support reusable content decisions."

Visual 2: Template vs. Snippet decision card	A mock card comparing when to use each content type.	Use generic UI boxes and your own copy. Do not recreate Outreach UI exactly.	“Decision-support card designed to help users choose between a Template and a Snippet.”
Visual 3: Snippet tooltip	A tooltip pointing to a generic “Snippets” button.	Use a neutral wireframe with placeholder UI.	“Contextual tooltip explaining that Snippets are inserted where the cursor is placed.”
Visual 4: Template review checklist	A checklist reminding users to review subject, body, variables, and personalization.	Create an original checklist mockup.	“Inline checklist supporting message quality before sending.”
Visual 5: Help resource panel	A small panel linking to public Help Center articles.	Use your own layout and link to public resources.	“Help panel connecting in-product guidance to deeper support content.”
Visual 6: Measurement model	A simple table or diagram connecting guide engagement to adoption signals.	Use generalized metrics only.	“Measurement model for evaluating in-product learning engagement and workflow impact.”

Example mock screenshot copy

These examples can be used in recreated wireframes or mockups.

Mockup 1: Guide launcher

Need help choosing reusable content?

Templates and Snippets both help you move faster, but they are used in different ways. Open this quick guide to choose the right option for your message.

Button: **Start guide**

Secondary link: **View Help Center resources**

Mockup 2: Template vs. Snippet decision card

Choose the right reusable content

Use a Template when...	Use a Snippet when...
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You need a full email starting point.	You need a smaller reusable block of content.
You want a reusable message structure.	You are adding content into a message you are already writing.
You plan to review and personalize the full message.	You want to insert text or an image at your cursor location.

Button: **Got it**

Secondary link: **Learn more about Templates and Snippets**

Mockup 3: Template tooltip

Templates are best for full-message starting points.

After adding a Template, review the subject, message body, variables, and personalization before sending.

Link: **Template setup help**

Mockup 4: Snippet tooltip

Snippets are inserted where your cursor is placed.

Click into the message where you want the content to appear, then add the Snippet.

Link: **Snippet setup help**

Mockup 5: Variable review reminder

Check variables before sending.

Make sure variables are populated correctly and the message still reads naturally for the recipient.

Link: **Variable help**

Mockup 6: Troubleshooting panel

Can't find the content you expected?

Templates and Snippets may not appear because of browser setup, permissions, access path, or content organization. Try the troubleshooting steps in the Help Center.

Link: **Troubleshoot missing Templates or Snippets**

Suggested public Help Center resource list

Resource category	Article
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Snippet setup	How To Configure an Outreach Snippet
Template setup	How To Configure an Outreach Template
Templates in Gmail	How To Add Outreach Templates in Gmail
Snippets in Outlook	How To Add Outreach Snippets to Outlook Emails
Variables overview	Outreach Variables Overview
Selecting variables	How do I see and select from the list of available Outreach variables?
Variable troubleshooting	Why are my variables not populating in my test preview?
Missing templates or snippets	Why are my templates & snippets not appearing in my search when adding to an email or sequence?
Content governance	How to Enable Outreach Content Governance
Copying and pasting content	Can you copy and paste into a message or template?
Sequence template use	How to add a template to a sequence step?
Workflow example	XDR Workflows for Pipeline Generation

Measurement approach

Because the pilot was paused before launch, this case study does not claim measured results. Instead, the proof of concept included a proposed measurement approach that could be used if the pilot is revisited.

Measurement area	Example signal	Why it matters
Guide engagement	Starts, completions, dismissals, repeat views	Shows whether users are finding or accepting the guidance.
Workflow action	Template selected, Snippet selected, content inserted	Shows whether guidance leads to action.
First-value behavior	First successful use of a Template or Snippet	Shows whether users are reaching the intended behavior.

Content confidence	User feedback, thumbs-up/down, short survey	Helps identify whether the guidance is clear and useful.
Support reduction	Fewer basic questions about Templates vs. Snippets	Indicates whether in-product learning reduces avoidable confusion.
Adoption pattern	Increased usage of relevant reusable content	Helps connect guidance to product adoption.

Result

The final proof of concept demonstrated how in-product learning could support feature understanding, workflow confidence, and customer onboarding without requiring users to leave the product experience.

Although the pilot was paused before launch, the work helped define a reusable design pattern for future in-product learning:

1. Identify a workflow where users may experience confusion or hesitation.
2. Define the decision points where learning support would be most useful.
3. Create short, contextual guidance tied to those moments.
4. Link to deeper support resources when users need more detail.
5. Connect the experience to adoption, confidence, and workflow completion signals.

The concept is intended to be revisited as the team moves forward with a different digital adoption or in-app guidance platform.

What this demonstrates

This project reflects my ability to:

- Design pilot-ready in-product learning for SaaS workflows
- Translate product functionality into clear, practical user guidance
- Use public documentation to ground learning design
- Create contextual guidance that supports users at the point of need
- Connect in-product education to adoption and first-value behavior
- Design scalable patterns that can extend beyond one feature area
- Adapt learning strategy when tools, timelines, or organizational needs change

Disclaimer

This case study has been generalized for portfolio demonstration only. It does not include proprietary Outreach implementation details, internal data, confidential workflows, stakeholder information, roadmap details, vendor decisions, unpublished product strategy, or screenshots from internal systems.

All product references are based on publicly available Outreach Help Center documentation. Outreach product names and trademarks remain the property of Outreach.

This case study describes a planned pilot-ready proof of concept that was paused before launch and may be revisited using a different digital adoption or in-app guidance platform. No internal performance results are claimed.