Shopify Onboarding Feedback

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Introduction

Hi, my name is David Pei, and I am driven by outcomes, fueled by curiosity, and built for execution.

I am a strategic thinker and a leader. In esports, I elevated myself and my team to be the best in the world. I know I can apply my abilities to build products that solve real problems and create measurable value.

PROMPT

"Please take the time to set up a free trial Shopify store. Submit a document or a short video detailing your thoughts about the onboarding process and feedback for improvement.”

Confidential

Who is our onboarding process for?

Anyone and everyone who is a storefront owner using our product for the first time, whether they are trial or new users.

What is our goal for the onboarding process?

To have new users quickly understand, experience, and derive real business value from Shopify.

Onboarding Goals

Increase Accessibility

Anyone and everyone should be able to use Shopify to set up their store from start to finish.

Educate and Empower

The user should be able to easily navigate key features, while also being able to organically discover the deeper capabilities of what Shopify can offer.

Build Confidence and Reduce Friction

The user should feel excited about using Shopify. They should not feel overwhelmed or excessively confused, regardless of technical proficiency.

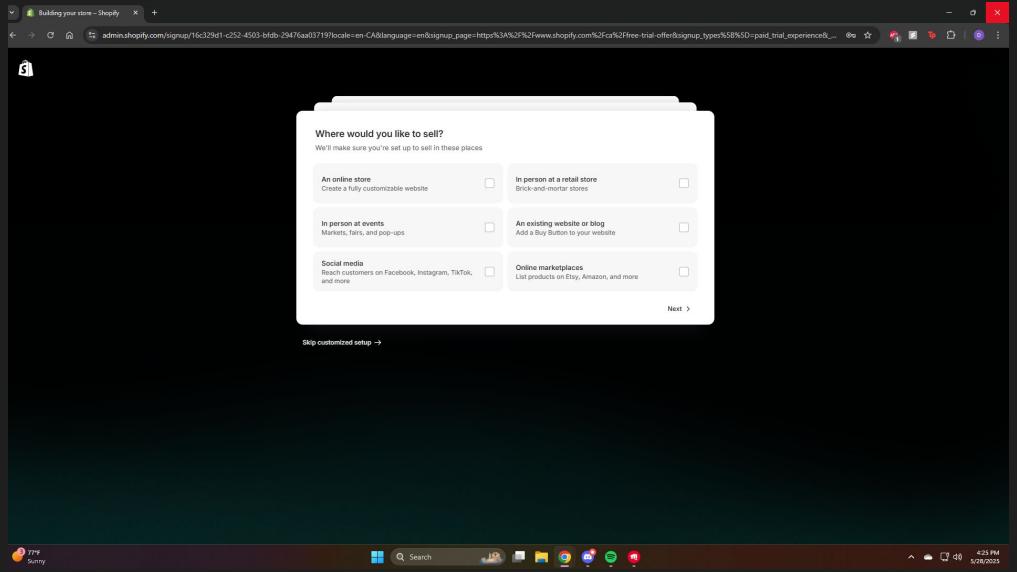
Increase Accessibility

Questions - Bigger Font and Bigger Cards!

Think about your parents onboarding to Shopify.

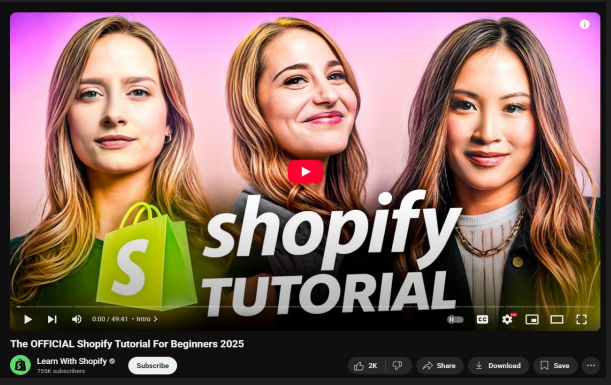
Would they be able to read the prompts on the right? Would they be struggling? Looking for their glasses?

Do they even know how to zoom in on browser?



Educate and Empower

Basic Navigation Tutorial on the Dashboard



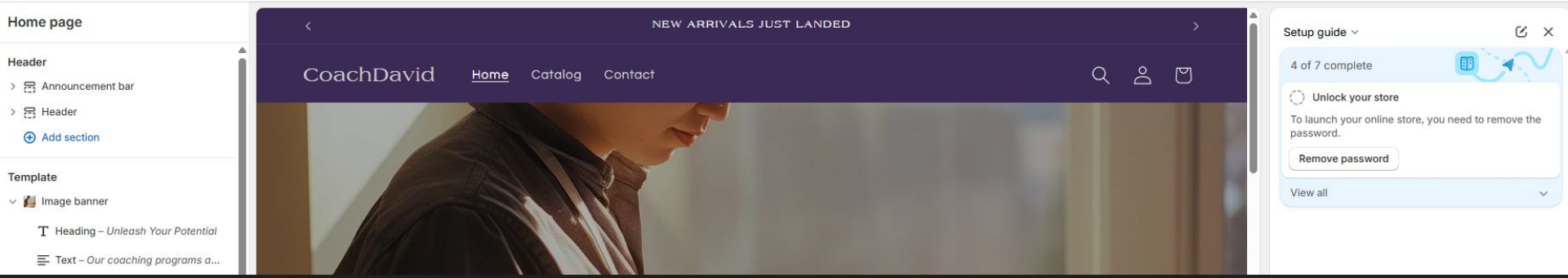
@jackeeschwartz7647 1 month ago

Too many gimmicks and not enough useful content for beginners! One of the fatal flaws was the "curse of knowledge." The ladies are all star quality as presenters, but basic tools are ignored or glossed over as they are being presented. Simple things like navigating from Administration to Online Store, to Settings, and others are still unclear to me. I am a former professional corporate trainer and am giving my perspective from a personal perspective. It would be helpful to know the function of each of those sections to understand where the various elements are located.

Having new users organically explore Shopify and all its wonderful functions is very important to an effective onboarding. However, first, they have to be able to navigate through the site before they are able to explore.

If we can teach new users to navigate to the most common and useful pages, they will be able to discover more on their own later.

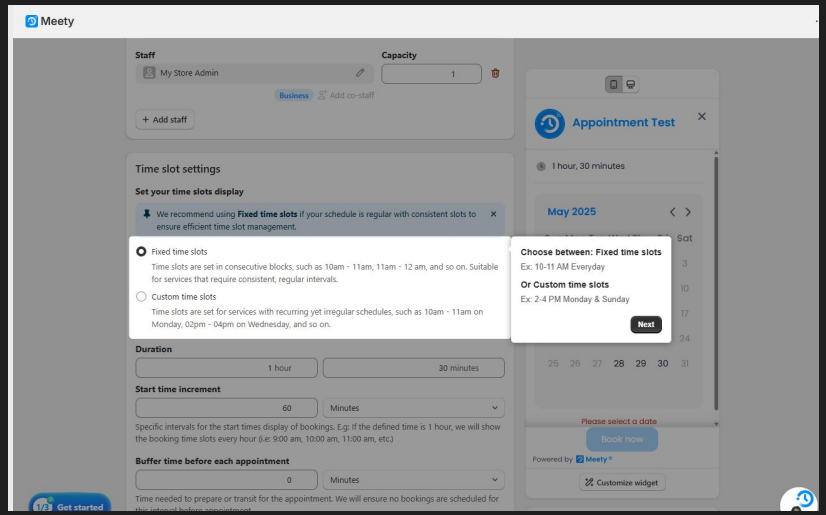
Setup Guide - More Emphasis, More Satisfying and Delightful Interactions

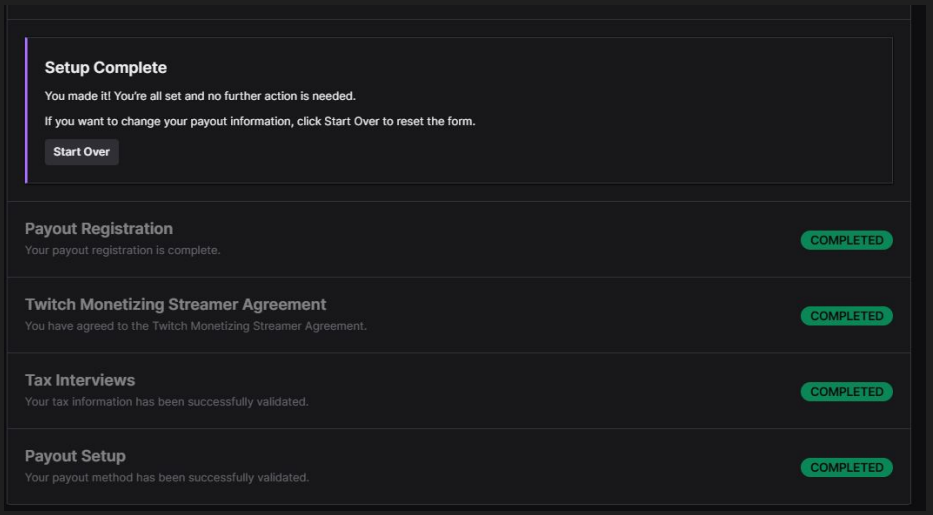


The setup guide should be the guiding light for the new users just getting started. Emphasizing the setup guide should more easily allow the users to navigate through the app, even if it's through highlighting other tabs for familiarity and discovery.

Anecdotally, while onboarding myself, I found myself always going back to the setup guide to reroute to my tasks. However, it was not very satisfying to not see my progress. Even when I did complete the steps, there was nothing to encourage me to do more.

Setup Guide - More Emphasis, More Satisfying and Delightful Interactions (cont..)





Force highlighting to show the user how to do it themselves

Completed progression and history of what has already been done

Conclusion

Increase Accessibility

The onboarding process is to help those who will struggle the most using Shopify and its basic functions.

Educate and Empower

Educate new users on the basics of navigation and this will empower them to explore more functionalities in the future.

Build Confidence and Reduce Friction

Give the user an enjoyable experience they want to come back to. Building a storefront is difficult and stressful, but let's try to make it as fun and easy as possible.

Thank you!

Contact me for any questions

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