

User Onboarding

Best Practices



What is User Onboarding?

User Onboarding is a process that starts from the very first welcome email & first run experience, and can span over several months (*depending on the product*) to keep the customer continue using your SaaS app and receiving value from it.

You've seen it before, it's that guided tour the SaaS app brings you through the first time you actually use the product.



A photograph of an elderly man riding a purple bicycle with training wheels on a city street. He is wearing a blue and white shirt and patterned shorts. A woman with long hair, wearing a dark sleeveless top and teal shorts, is walking past him on the right, holding a dark umbrella. The background shows a city street with buildings and a green car. The image has a dark, moody filter.

“Onboarding isn't about installing training wheels, it's about getting people to ride without them.”

— Samuel Hulick, useronboard.com

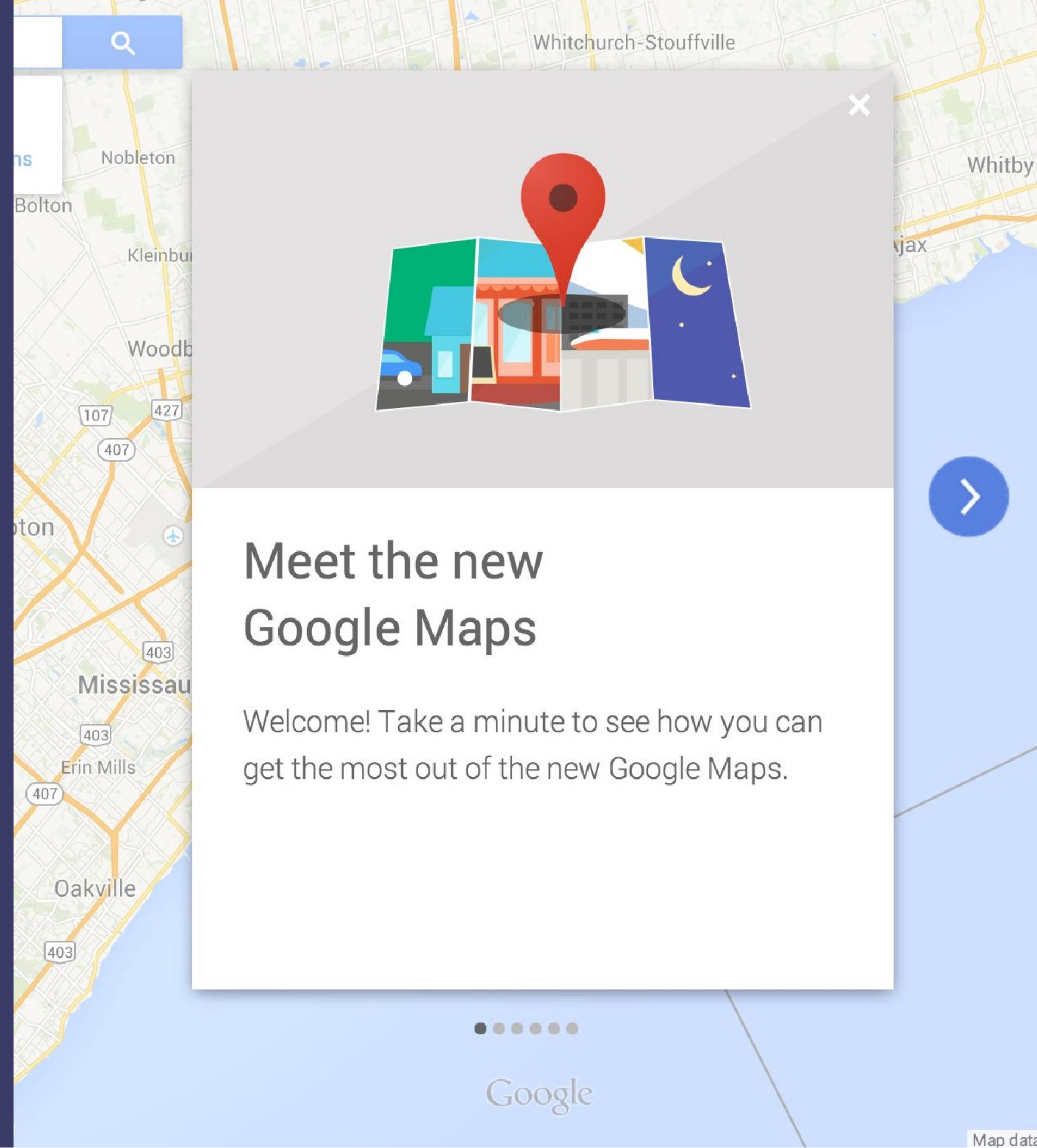


PHOENIX: BOSTON: LONDON

There are many different
Onboarding's type

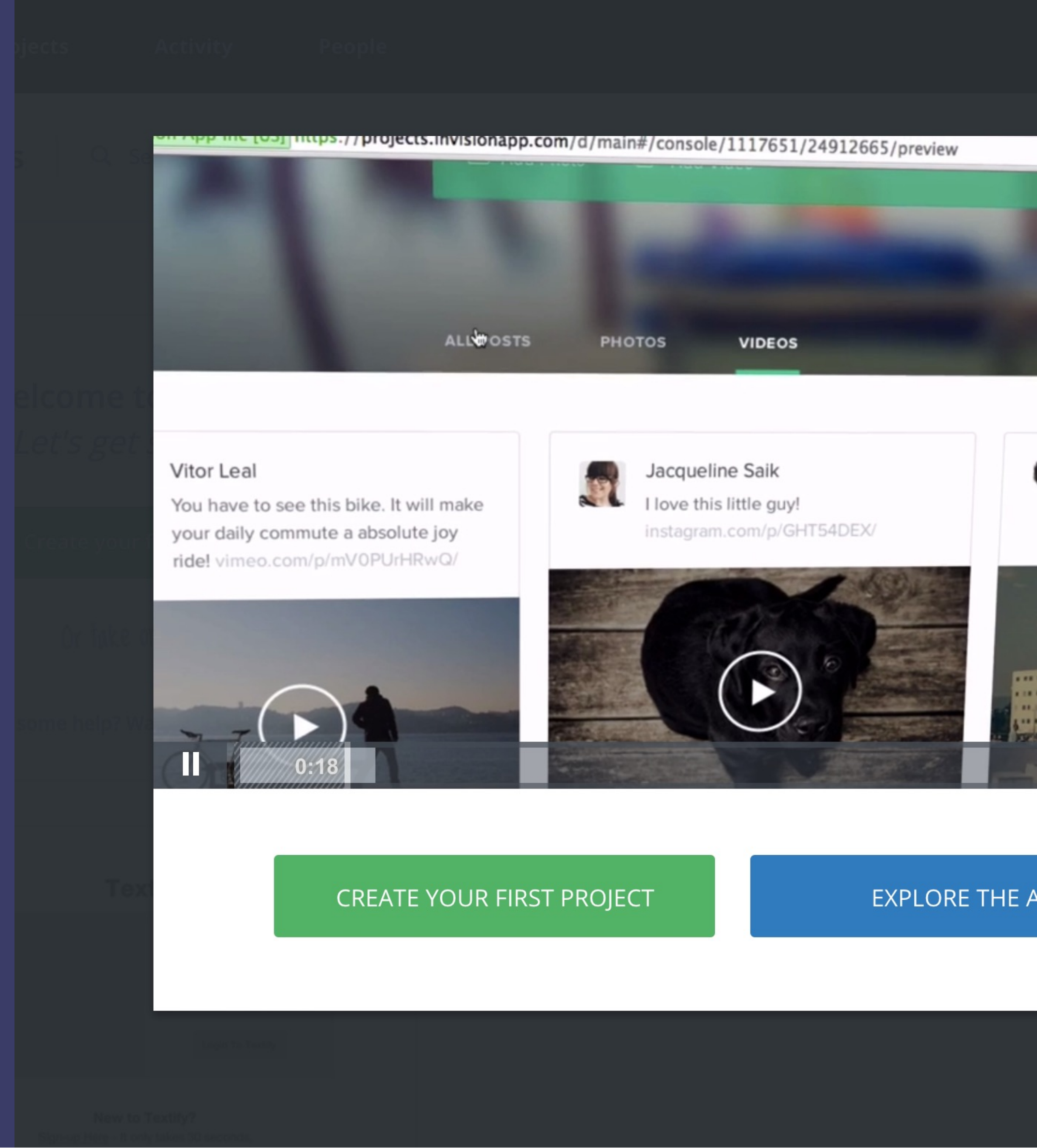
Slider Explanation

- + Clear and Compact message
- + Global POV / Product Philosophy
- + Easy to produce
- + Lightweight product presentation



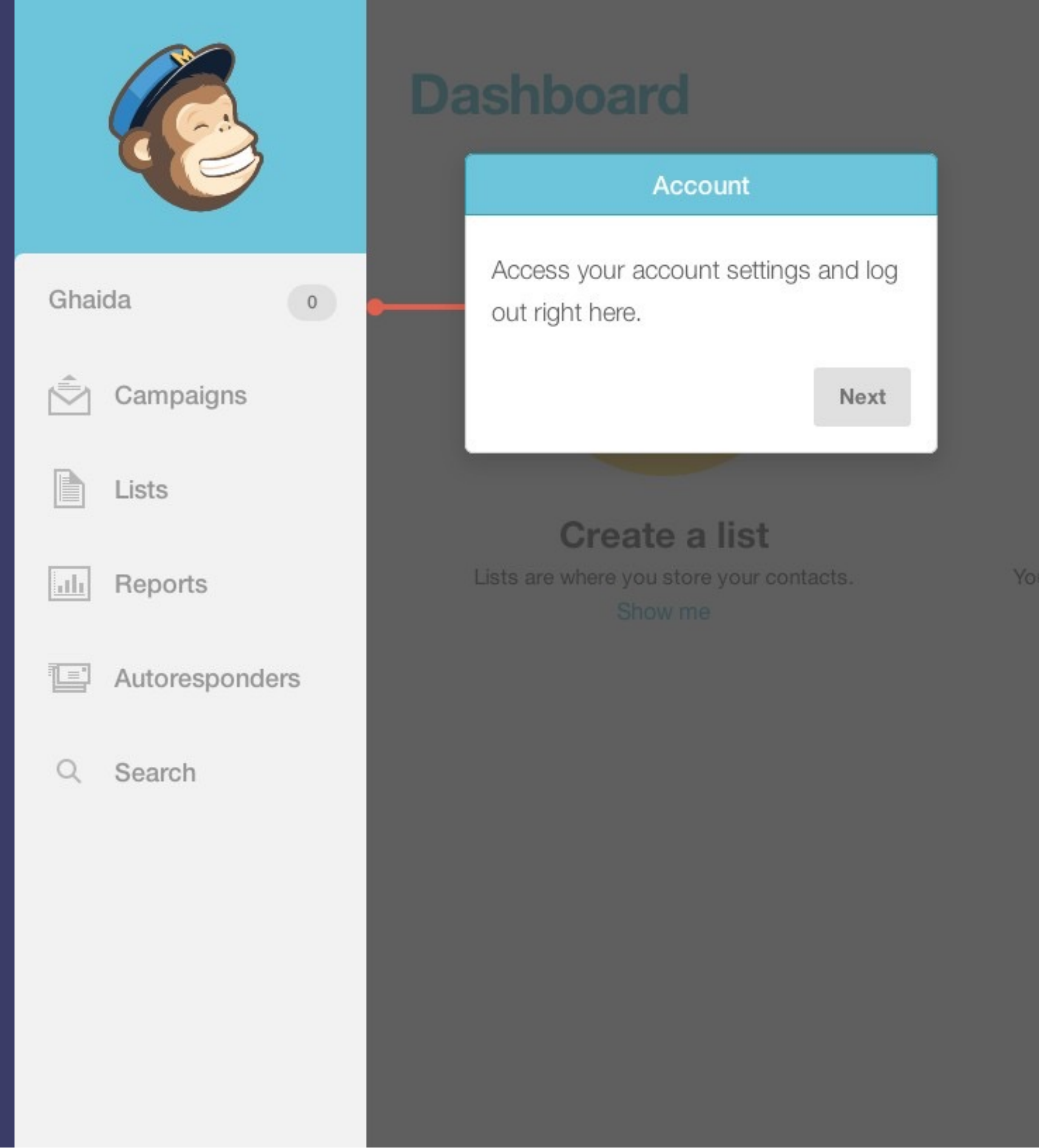
Video Onboarding

- + Easy to produce
- Very often boring for the users (too long, not well articulated...)
- You don't necessarily remember the explanation at the end



Interactive Tour/ Joyriding

- + Step by Step on different parts
- + Highlight with short explanation
- + Great way to teach people how to use features
- Time consuming to maintain if we iterate



Setup approach

- + How install the SDK
- + Step by Step
- + Suggest a verification checklist



Add Components



Customize Page

Directions: Add a component to complete this step.

Components

API (example)

Current Status: Operational

Management Portal (example)

Current Status: Operational

Empty States

- + Fake data
- + Components Preview
- + Engage user with call to action



Looks like you're ready for launch!

Your store is ready to start selling



Select a plan to open your store



You customized your store

[Continue editing](#)



You have added products to your store

[Continue adding products](#)



You set up a custom domain

[View domains](#)



Demo Space

- + Let the user explore the different interfaces
- + Great way to learn something alone

Welcome to InVision!
Let's get started...

Create your first project

Or take one of our demos for a spin!

Need some help? Watch our [intro video](#)

DEMO



Inbox

Search

me, **Billy Kiely**
We should grab some dinner t
Hey, do you feel like grabbing a

Jon Dowdle
Have you tried this burger plac
If you haven't, drop what you're

Mobile App Prototype

DEMO

Textify

Phone Number:
817-555-1234

Password:

☐ Remember me ☐ I forgot my password

Login To Textify

New to Textify?

[Sign-up Here](#) - It only takes 30 seconds.

Clickable Wireframe

Oct 15, 2014

Continued Onboarding

- + Recommendations
- + Suggestions
- + Great way to keep the user on your product

Personnes, un poste, des entreprises...

Avancée

Services professionnels

Compte Premium

Modifier l'arrière-plan

PLU

er at FollowAnalytics

ance | Design

287 relations

Modifier les coordonnées

Modifier

6 43 13 20 87

Télécharger un fichier

Souhaitez-vous ajouter...

Publications

Résultats aux examens

Programmes

Brevets

Vous pouvez aussi ajouter ces modules...

Certifications

Volontariat et causes

Take Care

- + Let the user do it
- + Don't teach all at once
- + Use fewer words
- + Remove noise
- + Create a clear, short & friendly copy
- + Engage user with call to action

A dark, moody photograph of a person's shadow walking on a cracked asphalt surface. The shadow is cast long and dark, moving towards the viewer. On either side of the shadow, there are large, hand-painted white arrows pointing in opposite directions. The overall tone is dark and contemplative.

What we really need
Step by Step

Before Sign Up

- Clearly show them what they need to do to start using the product
- Let the user know how long (& easy) your signup process is
- Collect as less information from the user as possible
- Be friendly and notify user on what to expect after signing up
- Once inside the application help the user to focus on things he needs to accomplish first
- Keep it less ambiguous as to what they need to do in the interface, by reducing clutter

When setting things up

- Show early wins, help them achieve more frequent wins as they progress
- Put things under-the-hood until they would really make sense
- Add contextual help wherever you think a user might be mislead
- Don't be afraid to walk user down the lane or provide a help link for detailed guide or a quick help video to explain your setup process
- Help user visualize the changes they configure
- Generate excitement about using the product in the future
- Teaches the user how to use the product by doing, not by words



“It’s always nice to be welcomed!”

— Samuel Hulick, [useronboard.com](https://www.useronboard.com)

Examples

“We're glad you're here!”

“Welcome home, John Doe”

“Hey John Doe, welcome to your Feed!”

“Welcome John Doe!”

“Welcome! Find something to play.”

Welcome to Mailbox
There are five zones in Mailbox, and you
swipe messages to move between them.



We're glad you're here,
Samuel Hulick.

Twitter is a constantly updating
stream of the coolest, most
important news, media, sports, TV,
conversations and more—all

vimeo Me Videos Create Watch Tools Upgrade Upload

Welcome home, Samuel Hulick

The latest Vimeo Video School lesson is "Weekend Challenge: Wo

My Feed My Videos Watch Later Discover Activity

Show: All / Likes / Uploads / Appearances / Channels / Groups / Tags

Hey Samuel Hulick, welcome to your Feed!

Whenever you follow someone on Vimeo, their activity will show up here. You can also follow Channels, tags, and other things you want to keep up with. [Learn more about how your Feed works.](#)

Getting Started

- What is the **primary action(s)** we want our user to take within the app?
- What **steps** does the user need to take in order **to reach that goal**?



Set up Git

A quick guide to help you get started with Git.

1



Create repositories

Repositories are where you'll work and collaborate on projects.

2



Fork repositories

Forking creates a new, unique project from an existing one.

3



Be social

Send pull requests, follow friends. Star and watch projects.

4



Getting Started with Heroku



If you're new to Heroku, choose your language and follow our Getting Started guide to create a new app.



Ruby
Get Started



PHP
Get Started



Node.js
Get Started



Python
Get Started



Java
Get Started



Clojure
Get Started



Scala
Get Started

For returning user

- Once in the application show a personalized action list
- Help them resume aptly where they left before
- Show them a list of items pending configuration or enablement
- Show them a progress bar to let them know how much they could achieve by doing more with the tool
- Let them collaborate that they come back frequently

When introducing features

- Add references to your valuable features at relevant places without disturbing the flow of already enabled features
- Try in-app notifications for highlighting individual features as they are rolled out
- Send simple, elegant, descriptive emails to notify users of new features with embed videos or knowledge base links
- Make it obvious for a user to find your help content wherever they are (mobile, website, in-app, email)

References:

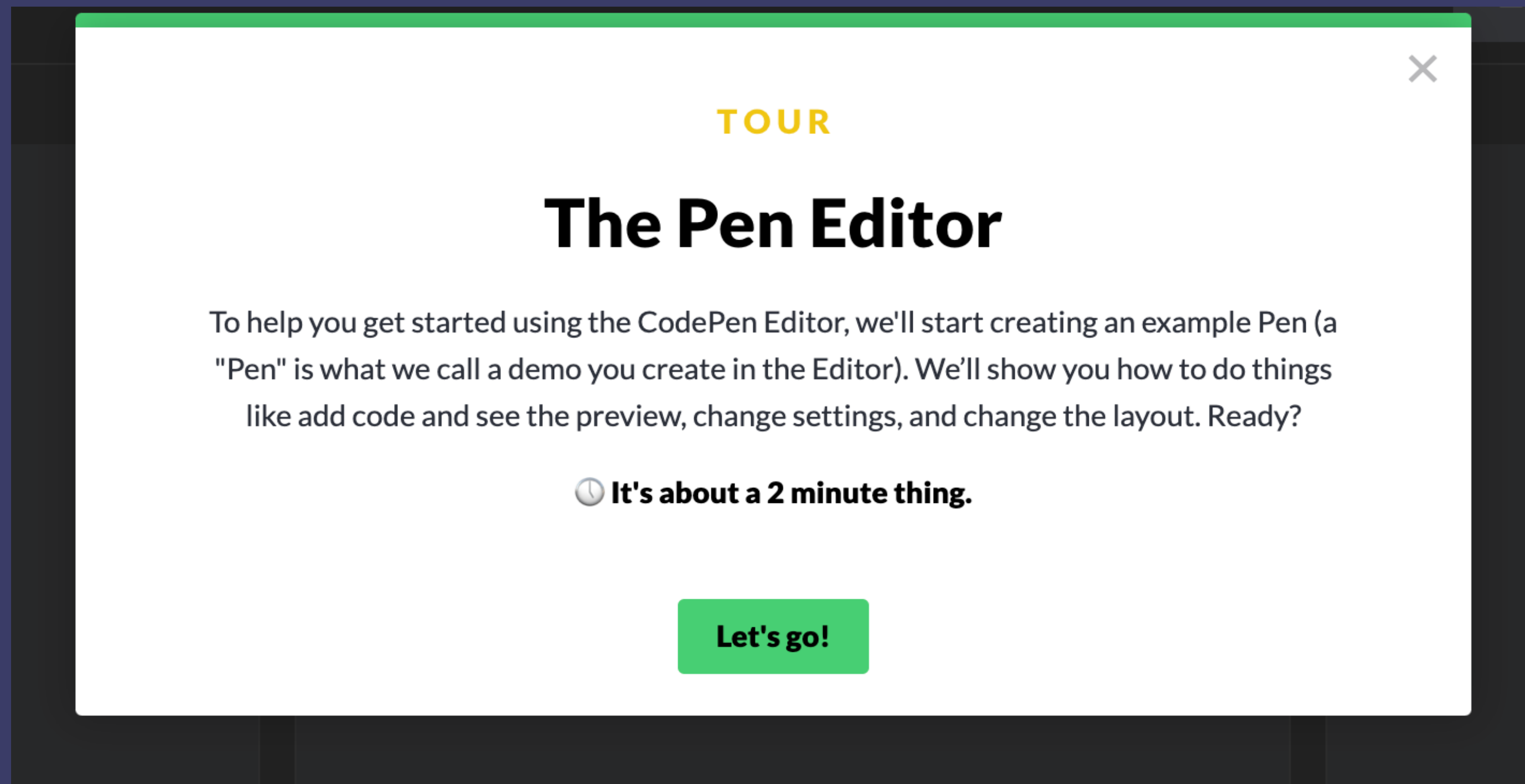
<https://speckyboy.com/onboarding-ui-css-javascript/>

<https://codepen.io/tag/onboarding>

<https://codepen.io/knyttneve/pen/eYdQbpN>

<https://codepen.io/reallygoodemails/pen/GZwQJK>

2 Minute Basic Onboarding Example





 HTML



1 ▾ `<h1>` 🙌 Hello World! `</h1>`

 CSS



1

 JS



1

This is the HTML Editor

We'll add some HTML in here. You don't need a `<!DOCTYPE html>` or anything, we [add that](#) for you.

⌵ Hide these tips

Next



CodePen: Unlock all of CodePen




🙌 Hello World!



 HTML



1 ▾ <h1> Hello World!</h1>

 CSS



```
1 ▾ body {  
2   font-family: system-ui;  
3   background: #f06d06;  
4   color: white;  
5   text-align: center;  
6 }
```

 JS



This is the CSS Editor

Let's add some CSS to style our document.

[Hide these tips](#)

Next



CodePen: Unlock all of CodePen



 Hello World!

 Save

 Settings



Click here to change your Pen Settings

You can control *lots* of stuff in here.

```
y {  
font-family: system-ui;  
background: #f06d06;  
color: white;  
text-align: center;
```

```
ntsByTagName("h1")  
e = "6vw";
```

спасибо 谢谢
GRACIAS 谢谢
THANK YOU

ありがとうございました **MERCI**

DANKE धन्यवाद

شُكراً **OBRIGADO**