



Intercom on Onboarding

TABLE OF CONTENTS

Credits

Foreword

Introduction

The low-hanging fruit of user onboarding

Killer onboarding starts with a story

One size onboarding doesn't fit all

Your onboarding has a shelf life

Showing customers the value of free

Strategies for onboarding new users

Onboarding groups, not just individuals

How your organizational structure impacts onboarding

Onboarding never stops

Conclusion

Intercom on Onboarding

Onboarding is one of the few things every single one of your customers will experience. *Intercom on Onboarding* lets you do it right.

If you'd like to read more, we regularly share our thoughts on onboarding, customer support, product management, and startups on our blog, [Inside Intercom](#).

Thanks to John Collins, Adam Risman, Sara Yin, and Stewart Scott-Curran for their help creating the book.

Cover and chapter illustrations: Justin Pervorse

© 2016 Intercom Inc.

ISBN 978-0-9861392-4-6

Long paragraphs of impenetrable legal warnings aren't really our style so we'll keep it simple. Please don't share this book, rip off any content or imagery, or otherwise try to use it for your own gain. If you do share or write about it somewhere (which we actively encourage) please be sure to give Intercom appropriate credit and a link.

Foreword

Trying out a new software product can feel awesome, like taking on a new superpower. Suddenly, you have a capability you didn't have before, like having a face-to-face conversation with someone on the other side of the planet, or knowing exactly which song is playing in the restaurant you're eating in.

The real magic comes when we can seamlessly acquire these superpowers. It sets the product/customer relationship up for long-lasting success right from the beginning. When this occurs, it's great not only for the customer, but for the business too. Converting signups into long-lasting, churn-resistant users is a tide that lifts all departmental ships: marketing, product, customer support, and beyond.

Unfortunately, most transitions from struggling-to-superpowered are anything but seamless. Signup, activation, first use, and re-engagement workflows are often tacked on at the last minute. Rarely are they designed as part of the “core” product to begin with. This is ironic - not only does onboarding provide that crucial first impression, it's also the only part of the product that, by definition, every single user will experience.

When a product's onboarding is underserved, the loss of users can be staggering. Every signup has the potential to be a valuable user of your product. And every signup has come to you thanks to the elbow grease of your marketing and product teams, who created a value proposition appealing enough to investigate.

Is that time investment - for both your company and its new signups - being rewarded with a robust, bulletproof activation process? Or is it being squandered with an experience that neglects the needs of first-time users, letting the majority of them slip through your fingers like sand?

Intercom has not only provided an immensely helpful product for engaging customers, they've also consistently delivered phenomenal recommendations and insights via their blog, and now this book.

From advice on activating new signups, to customizing their ensuing journey, to ensuring as many users as possible become successful ones, the writing that follows outlines time-tested thinking that will help your company thrive by helping its users do the same.

I truly hope you absorb and apply the advice this book provides. The world, and your business, could always use more superpowered people.

Samuel Hulick, UserOnboard

Samuel Hulick is the authority on user onboarding. Whether it's through his detailed and witty onboarding teardowns of some of the world's biggest products at useronboard.com, or his book [The Elements of User Onboarding](#), he's been central in bringing user onboarding front and center for modern software products.

Introduction

When we started Intercom, our mission was to make business personal. So we took it upon ourselves to email every new customer, to ask how easy setup was, and to see if there was anything confusing them.

It was a manual process, but repeatedly talking to people who are trying to set up your product is a surefire way to help you learn you need to fix your onboarding.

Even though onboarding wasn't as well documented as it is today, one thing was apparent: onboarding was and is the one truly universal problem every piece of software has. It's the only one thing literally all your customers are going to do, and you're guaranteed thousands of your users will run into some kind of difficulty with it.

It doesn't matter if you've tried every marketing technique in the book, if you're not onboarding users successfully it counts for nothing. Why would you invest so much in trying to attract users, but not go the extra step and try to keep them?

One of the obvious traps startups fall into is seeing onboarding as just three screens after signup. They fall for the snake oil of optimization and think a blue button instead of a red will magically deliver engaged users. In reality, onboarding is much more than tooltips pointing out buttons and menus that should be self-explanatory in the first place.

Onboarding is actually the phase a customer goes through in between making the decision they want to use a product, and being a fully setup user who can extract the most value from the product. In short, it's about helping your customers be successful.

What follows is a collection of lessons we've learned from onboarding customers at Intercom. They're free of hacks and gimmicks and cover everything we've learned over the past five years - from redesigning your onboarding to adapt to new contexts, to getting new users beyond the free trial.

While a lot of these lessons come from direct experience, they're bound by a universal truth any startup can take away. Good onboarding comes from focusing less on your own business, and more on your users. Onboarding isn't a metric, it's an outcome - successful users. Once you learn that, everything follows from there.

Des Traynor, Co-Founder, Intercom



The low-hanging
fruit of user onboarding

01

CHAPTER 1

The low-hanging fruit of user onboarding

DES TRAYNOR

Onboarding has traditionally been of two kinds. Either “Let’s point out our interface” or “Let’s decide where we want our user to end up, and push them that way.”

Both miss the mark - they don’t understand the difference between correlation and causation. Just because a user has reached 100% on a progress bar, or a tooltip tells them how to add a teammate, doesn’t mean they’ll make the progress you needed to solve their problem.

The best onboarding is the kind that pays less attention to getting users to complete steps the business cares about and more about getting them to those “successful moments”.

These successful moments usually have nothing to do with optimizing button colors or calls to action and everything to do with better understanding who your user is, what it is they are trying to achieve and where they currently are in your workflow.

Finding these successful moments is more difficult than adding a progress bar. It involves actually talking to customers while they’re signing up and after they’ve signed up, and learning as much as you can. But nobody said acquiring and retaining customers was easy.

Startups are knee-deep in customer acquisition metrics; click-through

rates, cost per click, cost per lead, conversion rate, cost per acquisition and more.

They wade through the data looking for easy tweaks, hoping that changing a red button green, or adding words like “Free” and “Now” to landing page headlines will add another 0.01% to their funnel. At best this Fisher-Price psychology gets them a few quick wins. At worst they spin their wheels for weeks pushing complexity around from one screen to another, all in the hope of growing signups.

“What happens to the users who sign up?” you ask. Well that’s the funny thing: most of them disappear, but that gets less attention in this game of Whack-a-Metric. It’s worth remembering that recovering a lost signup is worth just as much as capturing a new one. Of the hundreds of Intercom customers I’ve spoken with, they all have a variation of this problem: people sign up, click around, and disappear. That’s where user onboarding comes in - turning new signups into loyal and engaged customers.

With each successive generation of onboarding the focus has shifted slightly from what the business wants to what the customer needs. Early onboarding was outside of the product where help manuals, and later websites, were offered to users - externally and out of context - in the hopes they would use them instead of contacting support. Since then, onboarding has slowly moved inside the product.

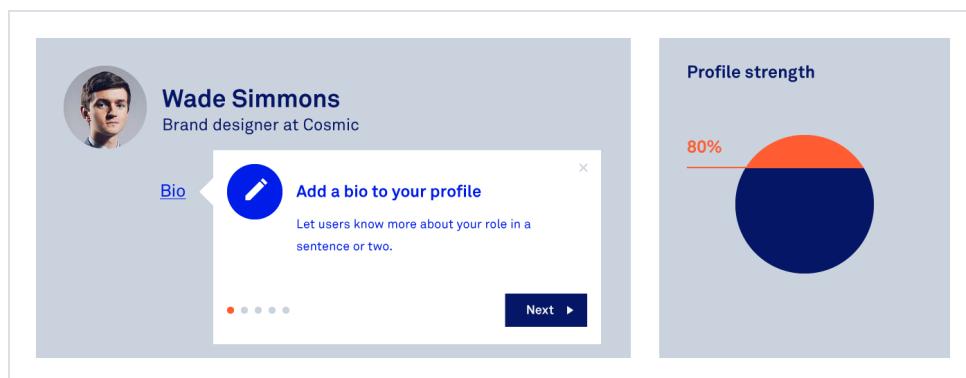
Signs on signs on signs: onboarding 1.0

Onboarding can't be a crutch



The first onboarding attempts focused heavily on the user interface, as if to say, “Hey! Look at what we built. Go click this please.” This style of onboarding begins with the product and tries to reverse engineer user desires from each piece of the interface. For most interfaces this amounts to tooltips pointing out buttons and menus that should actually be self-explanatory if the designers did their job right. If you can’t read the words on this button, why don’t you read the words in this dialog instead?

Completeness meters: onboarding 2.0



The next era of onboarding was made famous by LinkedIn. Gamified

progress bars shepherd users through a series of hoops, not too dissimilar to how trainers get their poodles to win top prize at a dog show. This approach consists of identifying a set of tasks you want every new user to do, arbitrarily giving them a percentage score for each task and then bugging the shit out of users until they hit 100%. Gamification: the [multi-billion-dollar industry](#) that never happened.

Progress bars are quite effective, but are still internally focused. They ensure the user does what the business wants, but not necessarily that users achieve what they want.

For simple, well-defined products, there's little difference between a user's immediate desire and the metrics the business uses to record progress. But for anything more complex (e.g. B2B SaaS products) this can result in force-feeding configuration options to a user who simply wanted to manage some tasks, or requiring a user to invite their team before they've finished assessing the product. For example, many products ask users to invite additional friends who aren't on the service before they show a user's onboarding as complete. Does this benefit the business or their customers?

Understand the customer's definition of success: onboarding 3.0



Alex

Active in the last 15m

Hi Stefanie,

Thanks for signing up – let me know if you've any questions.

In the meantime I'd love to know what are the most important things you're trying to achieve with ProjectMap?

Thanks,



Alex



We run on Intercom

Write a reply...



Rather than relying solely on emergent metrics and then forcing users to hit some business targets, modern onboarding focuses on the user and what they want to achieve. This begins with continually asking newly signed up customers what they are hoping to achieve with your product.

You will learn:

- their functional goals (e.g. organize my team's tasks)
- their personal goals (e.g. let me feel in control)
- and social goals (e.g. impress my boss)

You also need to ensure each new signup believes they are on a path to achieving their goals. This is what successful onboarding does. Slack does this well - their Slackbot guides new users through setting up their account by asking them a series of questions. Not only does the user set up their account, but they are learning to use Slack at the same time.

Other effective implementations of onboarding 3.0 include CoSchedule, an editorial calendar for WordPress, which gets new users to create and schedule an article during the onboarding flow. Duolingo, a language learning site, has new users translating a sentence into their chosen language before it even asks for an email address.

Onboarding your customers for success

The purpose of a trial is to convince a potential user your product will deliver what they need at a price they can afford. It's about getting users to those "successful moments". It's important to remember this is their

success, not yours, and has nothing to do with filling in database fields to complete their profile. Onboarding is the key here. So here's five steps to improve your onboarding:

1. Understand the different jobs your product is hired for

You might regard yourself as being in the “project management” category, but people who sign up might actually be trying to “improve productivity” or “get better at remote working”. Yes, your product solves these problems through the lens of project management, but it’s important to know what use cases, examples and copy will motivate your customers versus what will fall on deaf ears.

2. Understand what success looks like for each of these jobs

People aren't using your analytics tool for the sake of it, they're using it to get promoted, or to prove their worth, or to rally a team behind a common problem. A very simple step here is to ask new signups what they're trying to achieve with your product. Once you know that, you'll be amazed at how many onboarding changes you'll want to make instantly.

3. Design paths guiding them through the features that help them achieve this

Once you know the end goal(s) of your target users, you can design a flow to guide them to it. If there are end goals that are mutually exclusive (e.g. “I want to share my design work” vs. “I want to get more design gigs”) it’s best to let new signups declare their desire up front so you’ll never be tone-deaf.

4. Communicate with users to help them get there

Sadly, most product communications during trials are badly targeted, usually using “time since signup” as the key. In reality, just because it’s been seven days, it doesn’t mean I’ve done anything useful. Similarly, I could have signed up yesterday, spent all day in your product, and be fully up to speed. Activity matters, usage matters. Understand where I am, where I’m going, and send me messages that help me get there.

5. Have an early warning system for new users

Most products wait until a customer cancels, or fails to convert, and then the apologetic pleading messages begin. It’s when you’ll see “How can we get you back?” emails to a customer who has already checked out. That’s like waiting until you see divorce papers before checking how your spouse is doing. Instead, know what failure looks like and start the conversation before it’s too late.

Collectively, these steps won’t solve everything, and it’s a fair criticism of the new discipline of onboarding that a lot of this advice maps back to *Good Product Design™*. But as we discussed at the outset, you can go back

to tweaking button colors, or you can try something new: help your customers be successful. Do that and you'll find there's low-hanging fruit, and lots of it.

02

Killer onboarding
starts with a story



CHAPTER 2

Killer onboarding starts with a story

SAMUEL HULICK

Signing up for a new product is an expression of hope. When you invest your time in trying out something new, you're opening yourself up to the possibility that the way you've been doing things hasn't been so hot. That the way the new product affords will help you do it better.

Whether that hope is made real or not ultimately comes down to successful onboarding - the product can either deliver you from a not-so-great situation into a much better one, or you can revert back to the way you've previously been doing things.

Failing to make that hope real is a bummer for both parties - the business has lost a potential user (and with each churned signup, their overall cost per acquisition has gone up), and the potential user has wasted time they could have spent doing something useful. So how can you best stack the deck in favor of a good outcome all around?

The answer isn't easy, but it's relatively simple at the same time - get a crystal-clear picture of what the "good" situation you can deliver people to is, but at the same time genuinely understand the psychological motivations driving someone away from their pre-existing "not-so-good" situation to begin with.

Once you're able to fully take on your users' perspectives on why they're feeling restless before signing up and what they're hoping to find on the other side, you can much, much more reliably design a welcoming workflow that will usher them into the rad new life they're looking for.

If you want more people to adopt your product, you have to make sure you know what progress looks like in your user's life, not just on their screen.

Having a stellar user adoption rate is a beautiful thing. Converting users at a higher rate drives down the cost of user acquisition, which in turn stretches your marketing resources even further. It also means people stick around longer, driving up average lifetime value, and letting you invest your product resources more strategically.

The secret to getting there? First, identify the must-have experience that keeps people coming back, and make sure new users experience it.

Ensuring new users have that experience is a responsibility put on onboarding, even though onboarding itself is rarely designed to deliver it. Rather than relentlessly focusing on progressing the user to success, onboarding workflows seem content to simply introduce the interface and call it a day.

It's a real shame, because for onboarding to answer its higher calling, it has to go beyond moving people through a product tour. The story you build your onboarding experience on shouldn't be about your user interface, it should be about your user. And in order to build on solid ground, that story - the one beginning and ending with the user - needs to be thoroughly understood.

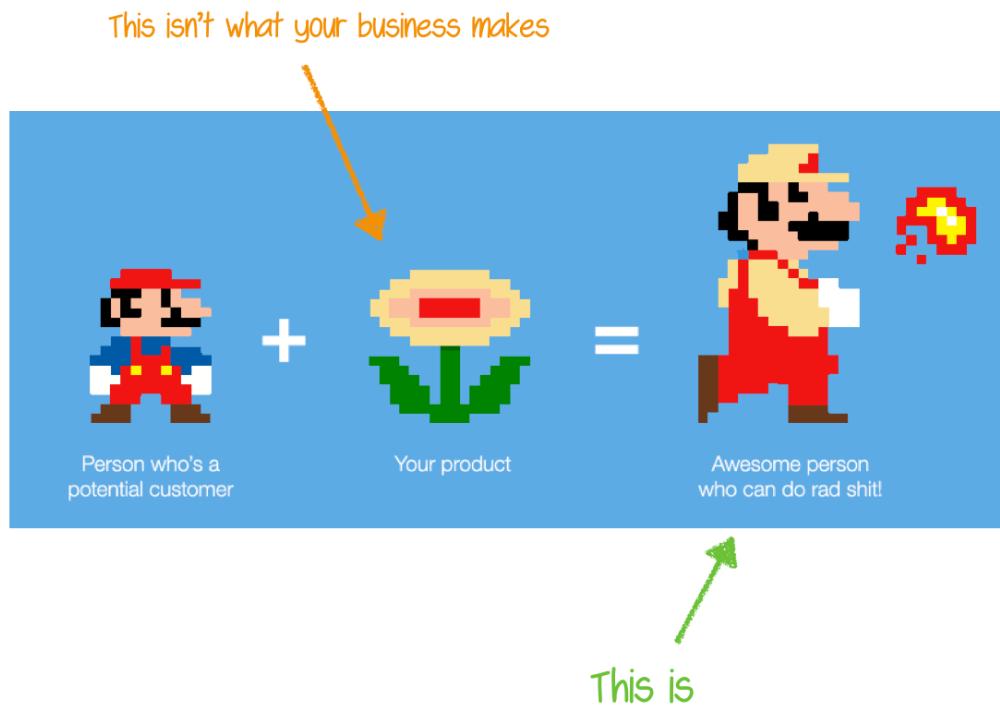
Setting the stage for successful onboarding

When you boil it down, onboarding is really about changing people's behavior. Your signups are frustrated with the way they're currently doing something and are hoping your way of doing things is better (or else they wouldn't be signing up). Onboarding strives to make that behavioral switcheroo a successful one for as many people as possible.

Onboarding, when working well, is less an instruction manual for weight benches and more like a personal trainer: they don't stop once they've shown you how the equipment is used; they make sure you attain your fitness goals. The same goes for user onboarding: in order for it to be successful, it must ultimately engender success in others.

So, long before you begin to weigh your interface options ("Should I go with an intro video or a series of tooltips?"), let's make sure you're clear on what your users are trying to get away from and where they want you to take them.

Why are people "hiring" your product?



Let's begin where your users begin: the situation they don't want to be in anymore. To take the “personal trainer” metaphor, this is the last time the person unhappily stares in the mirror, before finally deciding to do something about it. It's the specific, burning motivation driving them to adopt a new way of doing things.

[Clay Christensen](#), innovation expert and bestselling author of *The Innovator's Dilemma*, calls this motivating situation the “Job-to-be-Done”. The concept is that products are acquired in the same way a company opens up a new position in their organization: they recognize there's a need to grow or adapt, and they need to make a “hire” to fix it.

For example, someone may encounter an “I need to unwind” situation

after a long day at work, and “hire” Netflix to help relieve some stress. Or a startup may find themselves in a “we need to be better at talking to our users” situation with their product and “hire” Intercom to get the lines of communication flowing freely.

Frustrating situations open up new “employment” opportunities, and intimately familiarizing yourself with them makes sure your user onboarding nails the “interview”. However, you can’t discover them through demographic research or behavioral data. To fully understand what drives your users, you have to go straight to the source with interviews.

Who should be interviewed, and when?

Whenever possible, interview people who have just crossed the finish line to becoming highly-engaged users. Chris Spiek and Bob Moesta, Jobs-to-be-Done practitioners and co-founders of The ReWired Group, refer to this as the “switching moment”. If you charge for your product, it’s the moment people start paying. If you don’t, you’ll need to come up with your own engagement indicator and use that as the point of introduction.

Why is the timing important? If you’re approaching users before they’ve made the switch, you run the risk of interviewing people who won’t actually stick with your product. Approaching them too long afterward, though, means they’re likely to have already forgotten what drove them to change things up to begin with. People who have recently switched are proven customers, but still have the emotional memory of the whole

process available for recall, which is exactly what you're looking for.

Where does their story actually begin?

When conducting your interviews, try to keep participants focused on their actual actions and feelings when they made the switch. People are notoriously unreliable at predicting their future behavior and attitudes, so framing everything around what really happened (not what usually happens, or could have happened) during their onboarding keeps your emerging story tethered to reality.

Asking for specifics also helps transport people back into the actual moment, which brings up valuable additional details. Rather than asking them if they had an easy time with setup or not, get to specifics by asking which part was the trickiest, and deeply explore that moment. For example, while someone might not have a lot to add to “are you a safe driver?”, asking them to specifically recall the last time they were pulled over by the police would immediately thrust them into a story rich with emotional details.

Be sure to track every story’s breadcrumb trail as far back as you can get your interviewee to remember. The narratives that lead up to decisions can be surprisingly long - much longer than the surface would show. A journey to a car dealership may at first seem to begin with seeing a newspaper ad. But after even a little bit of digging it could turn out to have really started with a funny noise in the engine two months before. Onboarding always begins with the motivation to change, which always takes place before the user lands on your site.

If your user onboarding story was a movie, your product itself wouldn't appear until long after the action was already underway (and remember, the user is the star of this show, not you). Retracing their steps - especially the ones before your product comes into the picture - provides you with the context you need to correctly kick the transition off.

What has to happen for adoption to succeed?

Now the starting place is well-explored, have your interviewee recount their steps forward all the way to the moment they became fully up and running with your product. It's very unlikely to have been a direct path, so encourage them to meander or head off on seemingly-unrelated tangents. These often provide the richest insights of the entire conversation.

For example, if your product's setup process needs the user to import a bunch of data for everything to be fully up and running, urge them to take the scenic route in describing every little detail of how they accomplished it. Did the numbers come from a spreadsheet? If so, was it in Excel or Google Docs? How many sheets did it have? Did they import the data by uploading the file or by pasting it in by hand? How did the numbers even get into the spreadsheet to begin with and how long did it take to be populated?

Cataloging the external tedium involved in getting set up with your product doesn't just provide you with plenty of low-hanging fruit for making the transition much easier for your new users. It also gives you a

clearer picture of all the pressures they're dealing with that surround the time they actually spend inside your product.

In fact, there's one kind of pressure that stands heads above the others, and goes criminally overlooked in most product strategies: people pressure.

Who else has to be successful for adoption to succeed?

While it's crucial to understand what makes your "onboardee" tick, there's no need to stop there. People are social animals, and understanding an individual's motivations often requires understanding the motivations of those around them.

Nowhere is this truer than in the land of business software. Budgets need to be approved, technology needs to be reviewed, processes need to be changed, and colleagues need to be trained. Understanding what motivates the budget-holders and technology-reviewers in your user's life can help you ensure things get past all those surrounding parties as quickly and easily as possible.

If it comes up in an interview that their managers wanted an explanation of why a product was worth the investment, arming future users with a professional and credible PDF outlining the ROI of your product will beat leaving them to come up with reasons on their own. If you frequently hear the IT department nearly scrubbed the deal with their technical review, you can save untold others from the chopping block with a well-

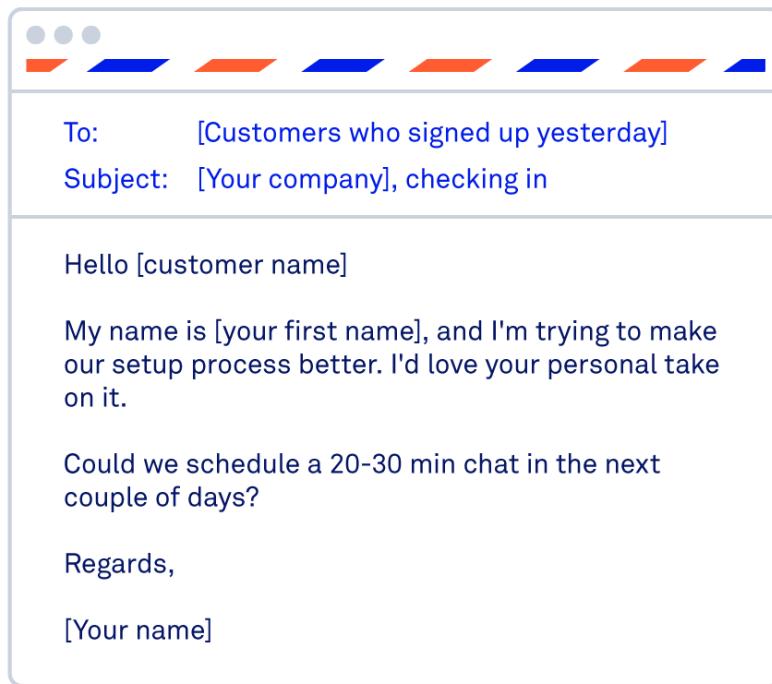
timed offer for a guided tour under the hood.

Ask as many questions as possible about who applied pressure to the process, and what pressures those people were dealing with themselves. Teeing your user up for success doesn't - and shouldn't - have to exist solely within the confines of your product's interface.

Go forth and listen

The insights that create an exceptional onboarding experience are out there, but won't fall into your lap from a Google Analytics chart or an open text box tacked onto an NPS survey. To uncover the real story - the powerful, driving, emotional one - you have to access the person behind the user.

In fact, I want you to do this so much I'm sharing a time-tested email of mine so you can get started right away. Send this to people the day after they become customers (or cross the engagement proxy).



Not everyone will reply, but I guarantee some will, and the hardest part of interviewing - getting people to talk with you - will be covered. Once you have them on the line, make sure to remember these points:

- In order for your onboarding to succeed, it has to make your users successful
- People sign up for products because they're frustrated with their current situation.
- The frustrations are the key early motivators, and are uncovered by interviewing people who have recently made the switch.
- The interviews should always skew towards real events and feelings, rather than abstract or presumed ones.

- Track the initial motivations back as far as possible, then move forward with as many specifics as possible.
- Take the scenic route - color and commentary is a very valuable resource.
- Catalog and overcome outside stumbling blocks and hurdles, be they software or people.
- The story starts at “frustrating situation” and ends at “successful situation” - make sure all the dots connect!

Interviewing isn't easy, but it's a heck of a lot more enjoyable than pouring tons of late nights and hard-earned dollars into a product that's sucking wind. Here's to your onboarding (and your users') success.



One size onboarding
doesn't fit all

03

CHAPTER 3

One size onboarding doesn't fit all

NATE MUNGER

When contemplating a career switch from education to software a few years back - as nervous as I was to make the leap - I was confident my teaching skillset would serve me well.

Looking back, I think I underestimated the relevance of my experience. The parallels between teaching and working in a startup are pretty striking after all: long-term planning and project management? Check. Interpersonal skills and written communication? Check. On-the-fly adaptability and resilience working under deadline in a stressful environment? Well, you get the picture.

What I didn't expect was how the deeper professional knowledge and educational theory I had accumulated over 12 years could be directly applied to onboarding. Educational theory might not be the first place you'll look when trying to build software. But a few key concepts will help your users get the information they need, when they need it.

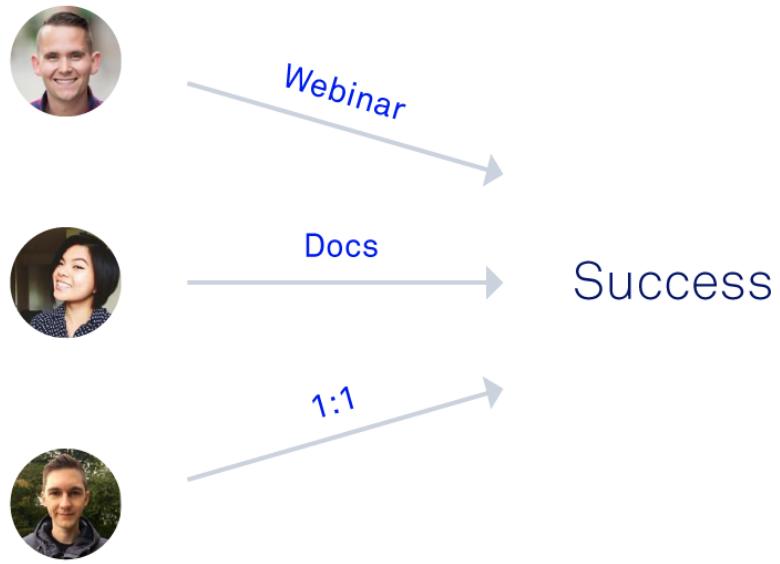
When it comes to guiding customers to success, a one-size-fits-all approach just won't work. Instead, try differentiating your onboarding so all types of customers can master your product. I spent 12 years as an educator, designing curriculums and making sure every student truly learned the subject matter.

One of the fundamental challenges of teaching is that not every student

learns in the same way or at the same pace. Some learn best by reading. Others prefer listening to a lecture or watching a demonstration. The kinesthetic do-ers want to dive in and learn by doing it themselves. Others prefer to watch from the sidelines. And regardless of style, it takes a little one-on-one tutoring to fully grasp a concept.

The basic idea is that the primary educational objectives - making sure all students master essential knowledge, concepts, and skills - remain the same for every student. But teachers use different instructional methods to help students meet those expectations. This is a concept known as differentiation.

You should differentiate your user onboarding as well. Not only can you have different types of companies using your product (startups, SMBs, enterprises) that move at different speeds, but you can also have differences in the individual user's learning styles.



As in the classroom, your goal for onboarding is the same for every user: help them extract value from your product so they become satisfied, paying customers. That's why you should build differentiated support structures so onboarding can happen at different speeds and in different ways.

In a classroom setting, teachers provide students with **scaffolds**, or temporary support structures, to help them access challenging content and complete tasks they couldn't otherwise. In software, scaffolding looks like great written documentation, how-to videos and best practice blog posts. These resources support multiple learning styles.

Spending a little extra time thinking about the organizational structure of your documents will pay off. Matching them to the logic of your product will make them more user friendly. It's the same reason scaffolding

follows the contours of a building. For example, at Intercom we've organized our documentation by the different "jobs" customers use Intercom for.

Likewise, our blog is organized thematically. We regularly publish posts by members of our team in their areas of expertise. Our customers also get to tell their own stories of success with Intercom on our customers page. All of these are great examples of [peer-to-peer learning](#) - a research-driven educational technique.

These self-serve resources are great - customers can go back to them as many times and as often as they want. They provide more details to customers who contact you for help, and act as a resource for customers who would rather figure it out themselves. Everyone wins.

An old fashioned conversation

Teachers build time into their lessons to take student questions and hold discussions about high-level concepts. It helps clear up confusion, contextualize theory, and engage students. These kinds of conversations stretch students understanding of content and concepts. It also lets teachers assess how well their students have grasped what they're trying to teach them.

In the same way, facilitating this conversation will always be a crucial part of user onboarding and retaining more customers. A tool like [Intercom](#) lets customers get answers to questions you didn't anticipate in your docs, or they can't answer independently. If you find the same

questions are being asked over and over again, this is great feedback about the usability of your docs, your product, or both. Teachers adjust their lessons based on this type of informal assessment all the time. You should too.

At Intercom, our customer support team tags every conversation twice. One identifies the team responsible for that area of the product, and the other categorizes the type of conversation (confusion, bug, feature request, etc.). These tags help our product team iterate and plan our roadmap.

One-on-one and group tutoring

One-to-one teaching is the ultimate form of differentiation. That's why teachers' doors are open at lunch, or after school for students who needed extra help. That's why they build in time during lessons to check in and make sure students are understanding the material.

Individual demos can help new users get a head start in your product while also making personal connections. Customers who are not successfully using your product will eventually quit, taking all that revenue with them. Identifying these customers and proactively reaching out to offer a demo will definitely be worth your time. Intercom can even help you automate this process using the data you're tracking to proactively trigger demo offers to a targeted user segment.

For example, a project management tool might want to trigger an auto message, offering a demo to users on their Pro plan who signed up more

than seven days ago, started at least one project, but haven't used their super amazing reporting tool. Why? Because these users are not taking advantage of a very useful feature. This makes them less likely to see the value of the tool and more likely to churn.

Product demos are a great way to scale this personal onboarding approach. They allow one person to give a more personalized experience to a large number of customers at once. They're great for customers who want to learn by watching a live demonstration and asking questions. They also support those who prefer to just listen.

Webinars and personal demos offer opportunities for your customers to connect with someone on your team or interact with other users of your product. Relationships like these build loyalty, while helping customers get the answers they need to achieve success in your product.

Use data to customize your message schedule

Not every user needs every onboarding message. If you are talking to every user the same way, you're likely over messaging many and annoying some, or at least training them to ignore you. At the same time other users are left struggling to find answers, or don't discover valuable features. By tracking user events and attributes you can automate a message schedule tailored to each user.

If you're not differentiating your messaging based on customer behavior, you probably find yourself having a lot of reactive conversations. You're fielding support questions from people who are already struggling and

frustrated.

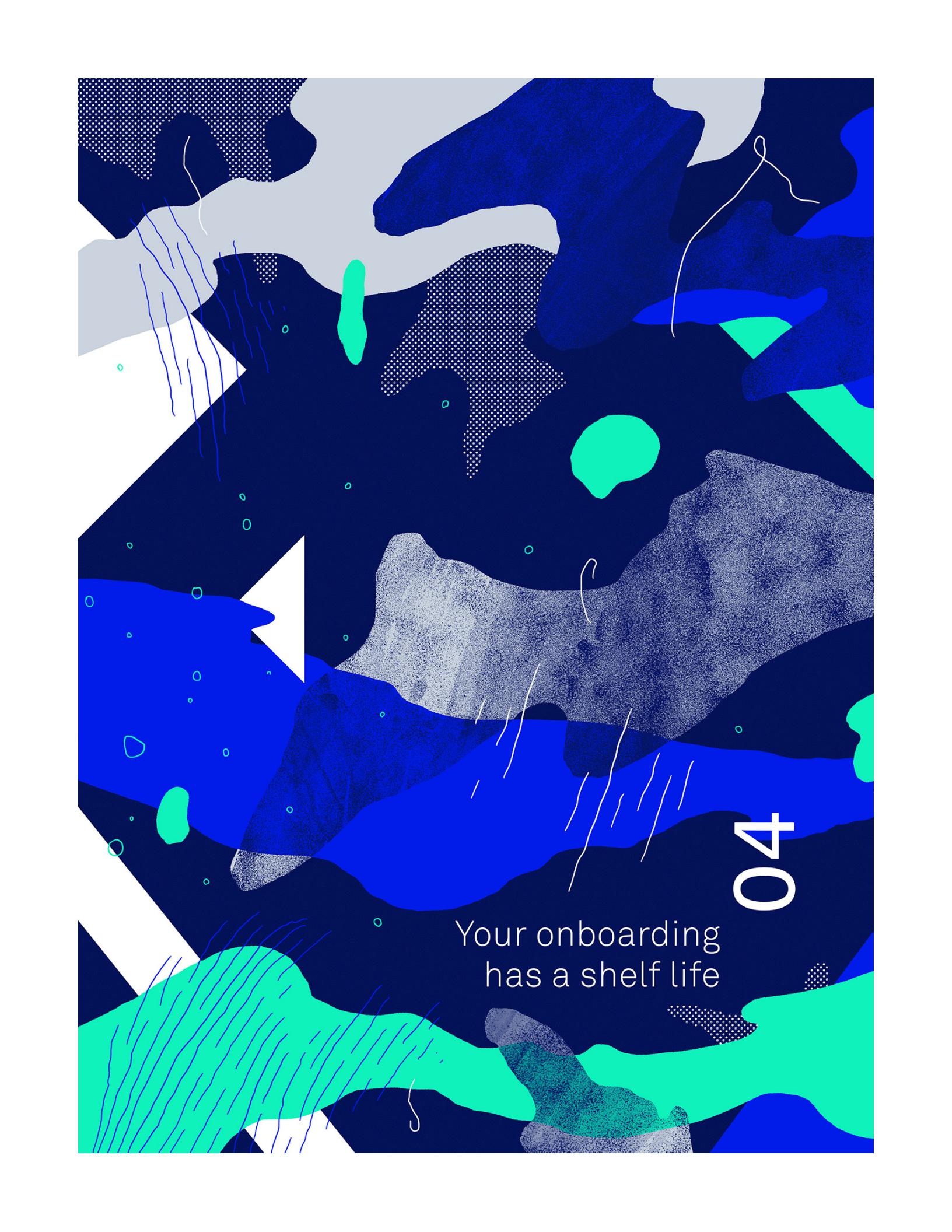
A proactive, data-driven onboarding message schedule means you are talking to your customers based on how they're actually using your app. Sometimes you're helping customers before they even realize they need it, and reducing your support load in the long run.

This “just enough, just in time” approach means you will send fewer messages to more of your users. The ones who do get a specific message are the ones whose behavior indicates they need it.

A little theory can go a long way

Educators know differentiation is hard, but worth it. That does not mean all 150 students a teacher sees every day get an individually tailored lesson. Rather, the best teachers plan variety into their lessons so there are multiple points of access to the content throughout a unit and the curriculum.

In the world of software at scale, it doesn't mean hand-holding every new user through the onboarding process. Differentiated onboarding means strategically building a few structures to help your users get the information they need, when they need it, in the way they understand it.



04

Your onboarding
has a shelf life

CHAPTER 4

Your onboarding has a shelf life

SEAN MCBRIDE AND STEPHEN O'BRIEN

For several years, user onboarding at Intercom centered on one action: installing a snippet of JavaScript on their website or app. For our technical user base of developers and small startups, it was the clearest and simplest way to get up and running.

What was less clear was that while our onboarding process remained consistent, our user base was broadening. Marketers, customer support teams and product managers were signing up for Intercom, and installing JavaScript wasn't as easy for them.

What we discovered was that as integral as UIs and snippets of code are to the onboarding experience, the context informing them - audience, environment, product, packaging and price - is just as crucial, and constantly evolving. In Intercom's case, our context has changed many times over the past few years. And our onboarding has had to follow.

Onboarding encompasses a lot of things: how you get set up with a product, how you learn about it, and how you purchase it too.

When we think about onboarding, most of us think in terms of software. But all products, in all industries, have an onboarding experience. Take the automobile industry, for example.

Car dealerships provide the onboarding experience for cars. They're the

place where you come to browse, try out, and purchase the different options available. This onboarding experience hasn't really changed since the 1950s. It's a big, glass box full of cars where you can talk to salespeople.

If we look at the broader context that informs the car onboarding experience, not much has changed here either. There have only been incremental shifts in the product they're selling, the environment in which they sell them, the audience they sell to, the packaging, and the price they charge. In fact, Tesla is the first car company that's tried to shift this formula.

When contexts change, so does onboarding

Compare this to an industry that's changed its onboarding over time - fast food. Back in the 1920s, the most popular restaurant chain in the US was Horn & Hardart, and American cities were very different than they are today. The population density of a place like the Lower East Side of Manhattan was four times what it is today. The onboarding challenge was to efficiently and effectively serve a huge number of customers in a relatively small space.

So Horn & Hardart created the Automat, an automated restaurant. You'd walk in, go to a wall with an array of windows containing different foods, choose the one you want, put a dime in, take the food out and go back to your seat. All of this happened without any staff involvement. The restaurant was amazingly effective. The biggest one in New York was able to serve 10,000 people per day.

Fast-forward 50 years to the 1970s and fast food has changed dramatically. It's something similar to what we have today - restaurants you drive to, or even drive through, largely outside of city centers. It was caused by a monumental shift in where people eat and live - suburbia. It meant car culture started to dominate, changing America's landscape forever. And as the environment changed, as the contexts changed, the onboarding changed too.

In software, contexts change fast

If we look at onboarding for software, the same contexts apply - the products we sell, the environment, the audience, the packaging, and the price. And in software, these contexts change fast.

With so much change, you'd expect onboarding experiences to keep pace. That's not really the case. Traditionally software onboarding experiences don't change much. Perhaps the biggest reason is companies default to optimizing their onboarding even when redesigning might be a better decision.

If we look across these two axes - performance and context - we can see the different situations where it might make sense to optimize, and when it might make sense to redesign.

When to optimize and when to redesign



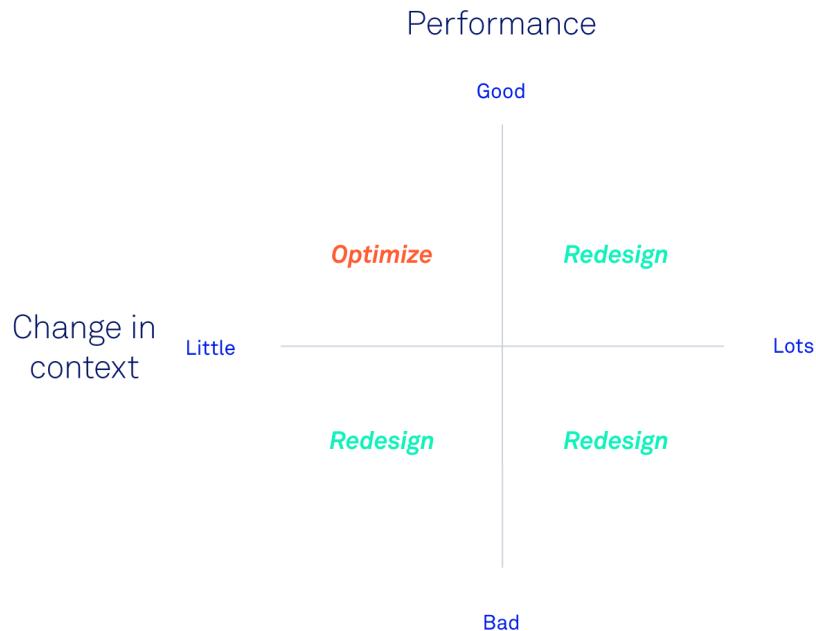
The first axis covers change in context. Have your audience, environment, etc. changed a lot over time?

The second axis covers the performance of your onboarding experience. Is it meeting the expectations and goals you've set?

As we can see, when your onboarding is already performing well, and you've only recently launched it, you should optimize. It means you have strong foundations to build upon, and you'll continue to get incremental improvements in performance.

On the other hand, if a large period of time has passed, contexts have changed, and your onboarding isn't performing well, you should think about redesigning. You should take a step back and consider the constraints and opportunities of onboarding in a new way in order to

come up with a new solution.



It's the other two quadrants that are less straightforward. In the top right, it could look like your onboarding is performing well. It's tempting to continue to optimize, and try to get incremental improvements out of that experience.

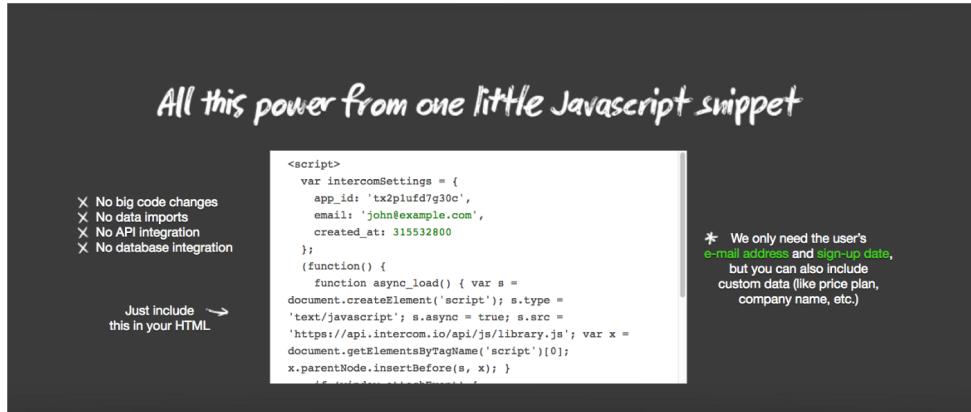
But the large shifts in context might actually be masking new opportunities that could unlock serious potential in your onboarding experience. In other words, what used to be good performance might not be all that good any more.

In the bottom left, the temptation is to try optimizing incrementally from bad performance to good. In fact, a redesign may get you to good performance more quickly than an incremental approach. Let's investigate these axes using a concrete example from our experience at

Intercom.

When your audience changes, so does your onboarding

For many years, the heart of Intercom installation has been a snippet of JavaScript. Add the snippet to a webpage or app, and tell us some information about the currently logged in user.



So early on, our onboarding challenge was simply, “Help as many customers as possible to correctly install this JavaScript snippet”. It was directly tied to our context - appealing to tech savvy people at small startups.

Over the following years, the JavaScript snippet remained. But by 2014, we had optimized it to death. For non-technical people, you could email your engineer for help. Or you could join a chat room so we could coach you through it. Or you could watch a 30-second install video. We did

everything possible to get you to install this JavaScript. In the meantime, we'd also received requests from existing customers about importing CSV data into Intercom.

So we built a CSV importer that existing customers could use to get extra user data into Intercom after sign up. The breakthrough came when we realized this importer could be useful for new customers who are signing up for Intercom.

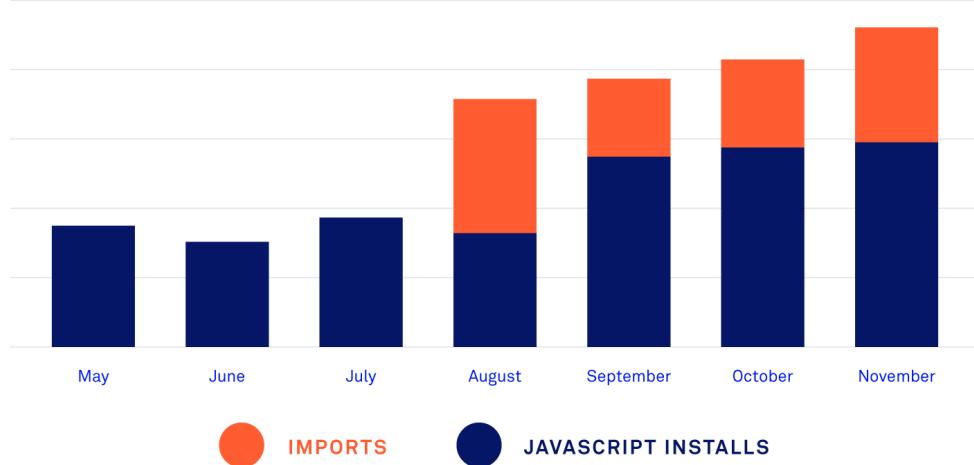
We realized our context had changed significantly. We'd moved to a broader audience who found it much harder to install the JavaScript. It was no longer about how to get customers to install JavaScript. It was about how to get users into Intercom.

Once we stopped optimizing, and started redesigning, the impact was massive.

The three months before we launched the CSV importer, our conversion rate from emails to signed-up apps hovered around 30%. In the three months following, our conversion rate rose to 45%.

Even more incredibly, we hadn't actually cannibalized the standard JavaScript installer - traditional JavaScript installs grew too.

New apps by signup type



It's important to remember redesigns have a shelf life too. The contexts that inspire a redesign will continue to shift over time. Even if your onboarding has a solid foundation and a proven thesis, it's important to continually assess when to optimize and when to redesign your onboarding. It's only then you'll be able to capitalize on new opportunities presented by shifts in context.



05

Showing customers
the value of free

CHAPTER 5

Showing customers the value of free

DES TRAYNOR

The only reason you should be giving customers a free trial is because you believe that after experiencing its value they'll decide your product is the right one. The common approach to 30-day free trials obsesses over days 28, 29, and 30 where the customer is seemingly making their decision. In practice if a customer has made it this far they're almost certainly going to convert; the real "will we or won't we" decisions are made much, much earlier.

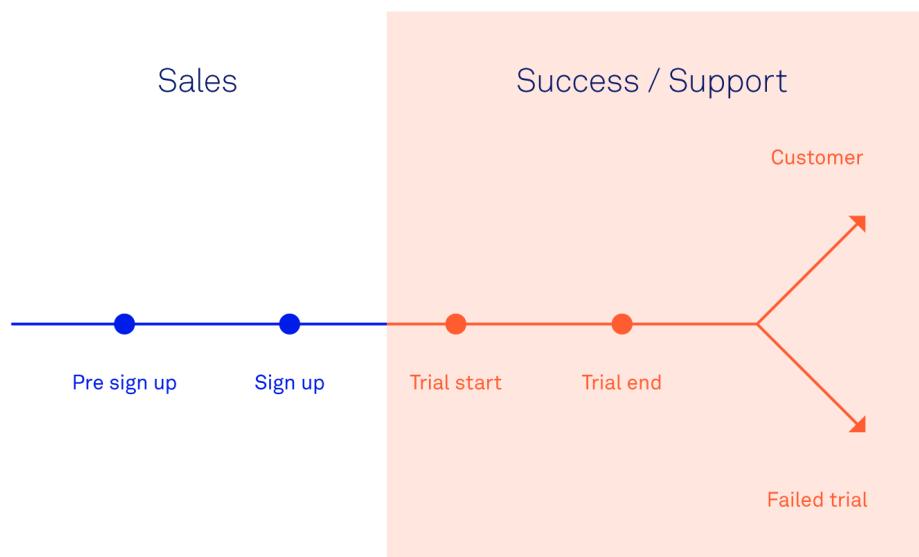
Remember, people are happy to pay for great products. Every customer who signs up for your product and starts a trial wants to become a customer. What you need to do during their trial is convince them your product is the right one. The way to do that isn't automated mails one day before the trial ends, it's to ensure they experience your solution early and often.

The way technology is sold to businesses has changed fundamentally in the last decade. As a result, so has the role of customer support teams in helping to close sales.

In the old world, potential customers rang a vendor to arrange a trial, a demo at their offices would be scheduled with a sales rep, and assuming that went well, negotiations about the price would get started. SaaS has turned all that on its head. Potential customers want to sign up for free trials, explore product documentation and talk to existing customers - preferably without having even talked to anyone at the vendor company.

While the self-service model has revolutionised the software industry, it's not without its challenges. It's dangerous to assume everyone can work everything out for themselves, to assume they want to work it out for themselves, or even that they will be able to do it themselves.

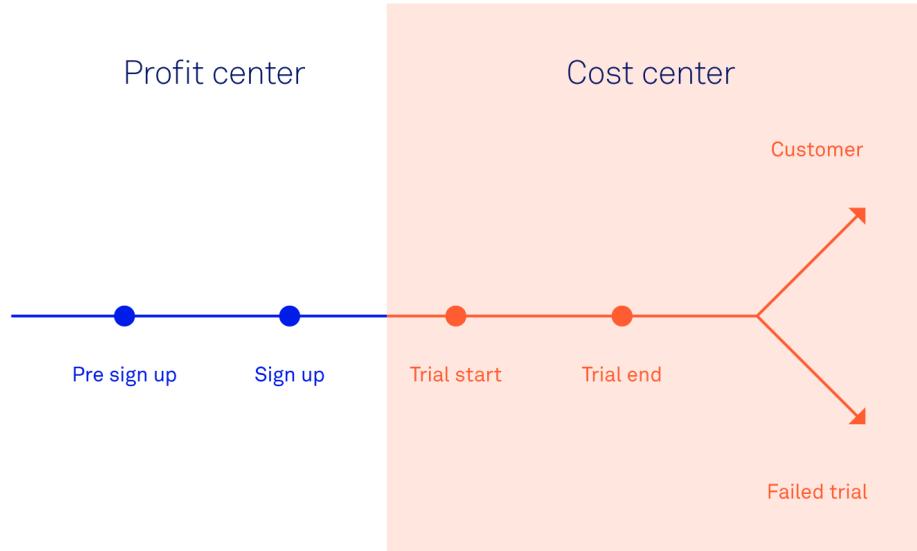
The typical SaaS way



Let me explain what I mean by looking at the typical signup flow for a SaaS product. Sales are usually responsible for everything until the customer starts a trial, at which point responsibility passes to customer support.

Most of the focus is on what happens when the trial ends - did they become a paying customer, or was the trial a failure? We capture that kind

of data in profit and loss centers, and it's no secret what's normally seen as a profit and what's considered a cost.



So much for the outcome of the trial. What can be done during the trial to try and positively influence that outcome? Because if questions arise when someone is in the middle of a trial for a \$449 per month plan, you don't want to leave the response to chance. Who owns those questions? Sales? Support? Success?

What happens on a trial

When a trial ends you'll hear phrases like: "It's too expensive", "We don't have that kind of budget", or "I haven't gotten around to trying it yet".

All that translates into one very simple reality - they haven't seen the value of your software during the trial period. These people knew how

much you charge when they signed up, so this is not just a question of your price - even if they say it's too expensive.

You think you only charge your customers

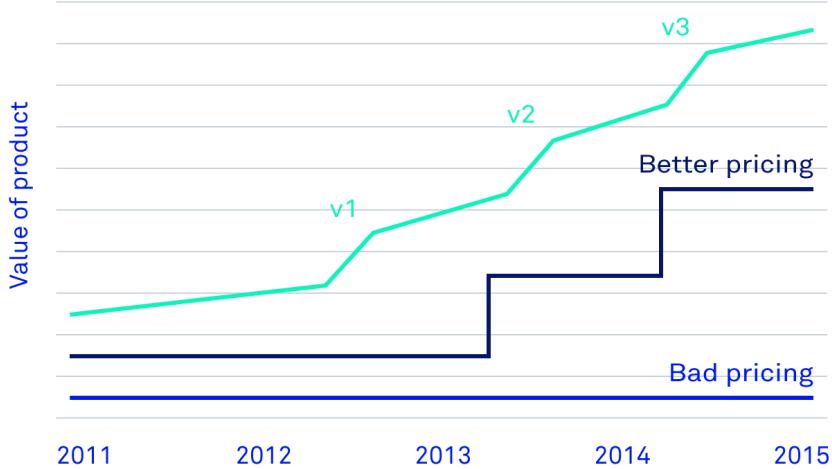


To use your product they have to spend...



No, when they say it is too expensive, they are not necessarily talking about the price.

In startups we like to think our products are getting better over time, that they deliver more value to customers every month as we make improvements and add features. So keeping a fixed cost over time is ridiculous.



As your prices increase however, it becomes more challenging to explain the value of your product if potential customers just see a big monthly price tag. Before they sign up it's the job of marketing to bridge the gulf between the value customers see and the what you're actually delivering.

You have the same issue once they start a trial. The value someone is getting may fall far short of the price you charge. They may be using your product as a simple task manager but you are charging for a fully featured project management tool. This time your customer support team needs to bridge the gap.

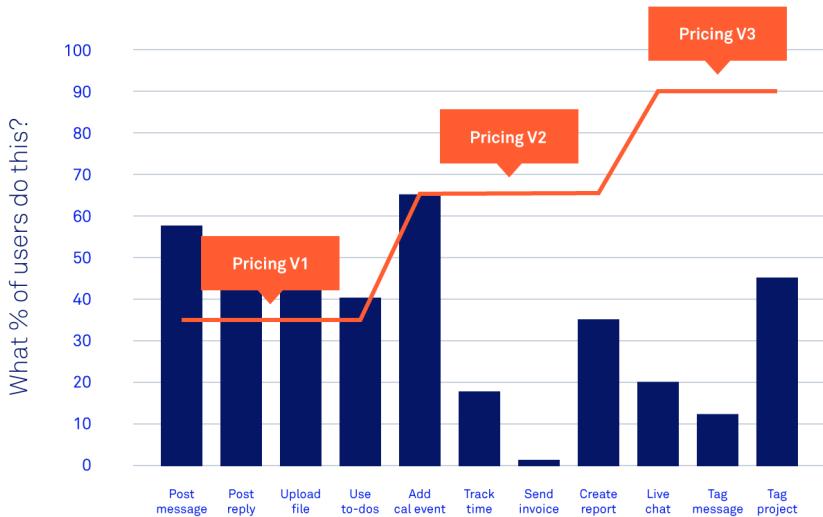
A good place to start is by doing a [feature audit](#) of your product. If you know what features are being used in your product you can build up a picture of what happy customers typically do. [Intercom](#) helps you to do this with a few clicks.

Armed with this data you can decide what features of your product you should be exposing your trial customers to. What are the things most

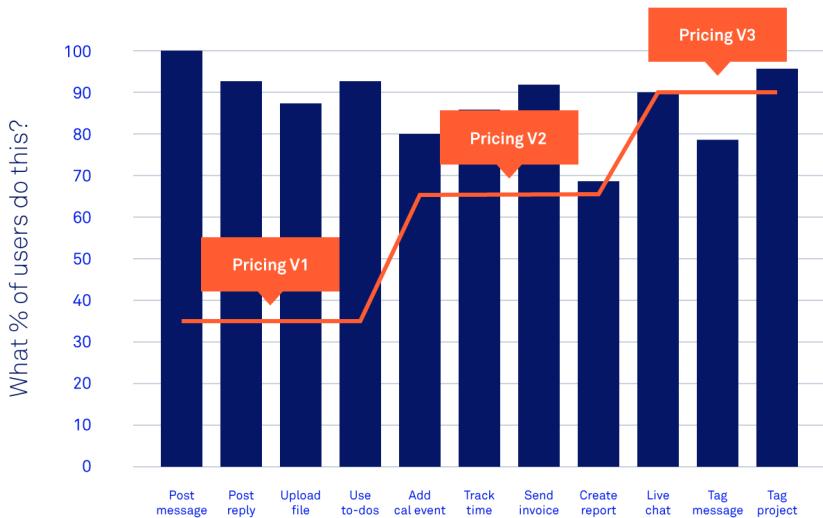
likely to help them see the value of your product? Another benefit of a feature audit is it shows if your product has become too bloated. You'll know bloat when you see it - features that aren't being used by any significant number of your customers. Of course, if you're in sales or customer success you might say bloat is not your problem, but that's not the case.

You should think of bloat as non-monetizable features, rather than just being something that's a problem for your product and engineering teams. Good products start with all the users using nearly all of the features. That grows the business and so you add new features. You're convinced everyone is going to use the new features just as much as the original ones - because let's face it no one thinks "let's add some junk no one wants".

But the reality of product management is not all your new features will be successful. You will introduce features that won't resonate with your customers - they won't be used, and they will damage users' overall perception of your product. That can even lead to reduced usage of your formerly successful features, and of course this is all happening against this backdrop:

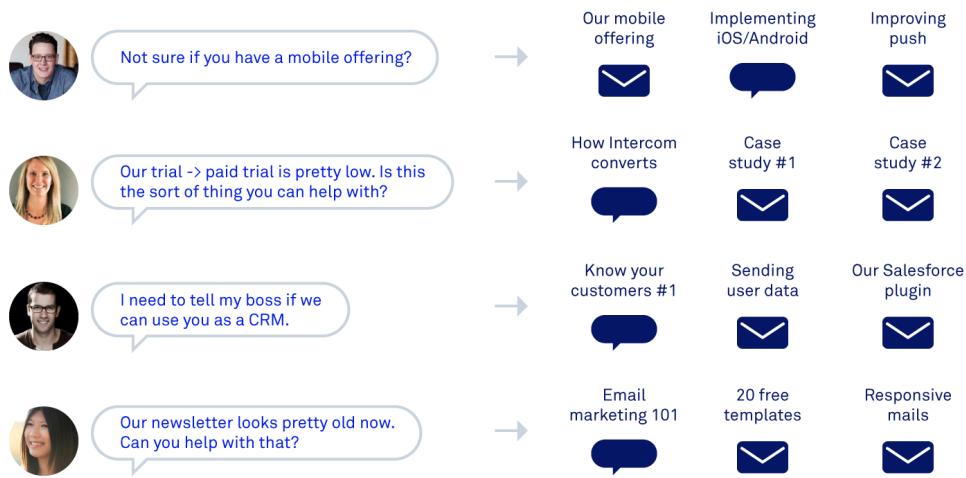


So what can you do during the trial period to prevent this from happening? It might sound a little glib but the job of customer support is to focus on what the customer needs for success. If that job is being done properly your customers will always value what they are getting from your product and you should see a chart like this:



What are your customers' expectations?

If you are unsure what success might look like for a particular customer, just ask them. Take Intercom for example.



When viewed this way it becomes clear different customers have different definitions of success. Dumping them all into the same customer success flow doesn't make any sense if you want to maximize your chances of converting them from trial users to paying customers.

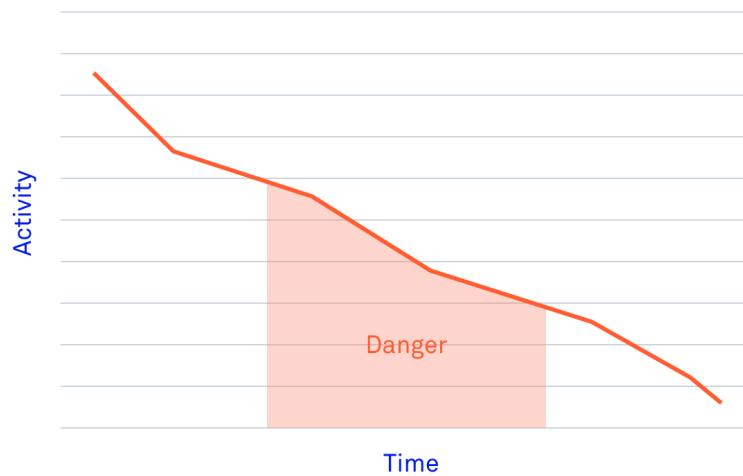
How to see failure coming

It is possible to learn how to predict, and to preempt, failed trials. You'll need to be able to track a user's activity over time. Luckily, Intercom is pretty good for that. The graph for a regular user will be pretty flat - by definition they use your product about the same amount of time on a

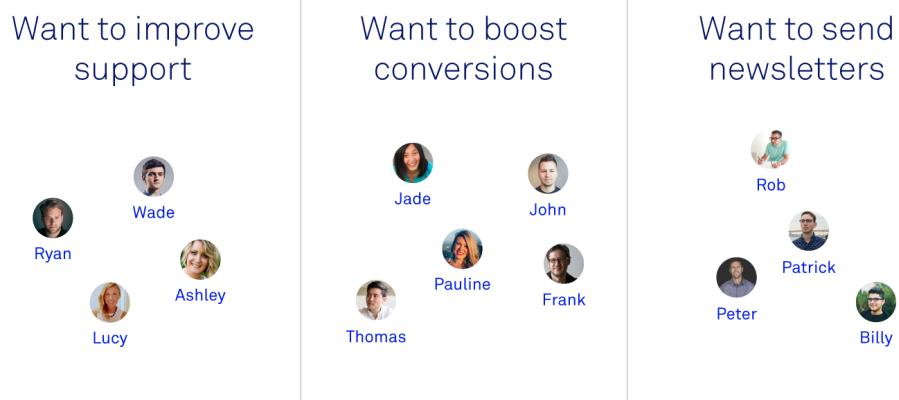
pretty regular basis.



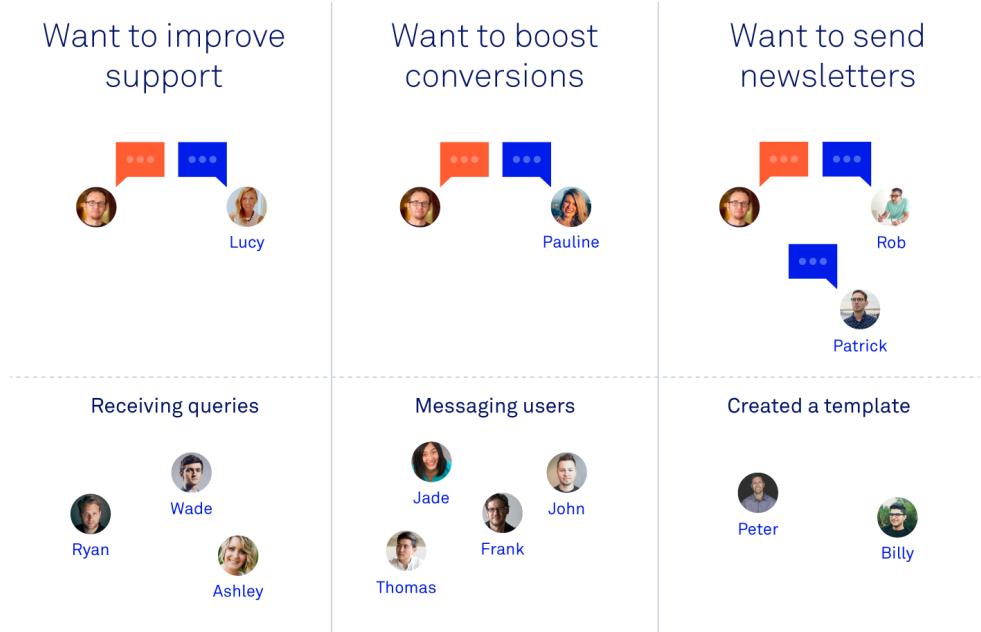
Successful free trials are pretty easy to spot - the graph is going up and to the right, while failed trials start somewhere in the middle and head downwards in a pretty predictable fashion. Once they realize you've billed them, they'll cancel, and that's the wrong time to try and get them interested in your product.



In an ideal world, we'd get an alert every time a customer was in the danger zone - their usage is starting to decline but there is still an opportunity to influence them. But real life is harder than that, and it's not easy to generate graphs like the one above for every single customer. So what can you do?

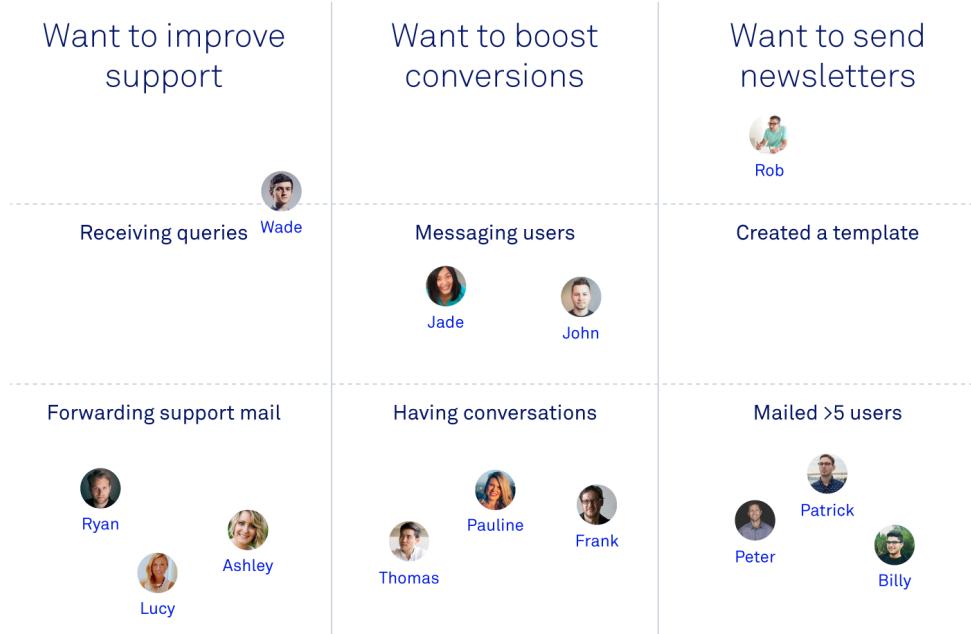


Start by looking at people, rather than abstract graphs that measure things like pixels and pages. If 13 people start a trial of your product on a given day they are not all going to have the same definition of success. Four of them might want to improve support, another five might be looking to boost conversions, while the last five might just want to send newsletters.



For each of these definitions of success you should have a corresponding action in your product you expect successful trialists to complete by day three. For those interested in support it's receiving queries, for those looking to boost conversations it's messaging users, and for those interested in newsletters it's creating a template.

Using rules such as “hasn’t messaged a user but signed up < three days ago”, you can reach out to the people getting stuck. For people trying out your most valuable plans that’s probably some form of 1:1 communication, but an automated email for common issues or customers trying your lowest plans.



You'll manage to nudge some of these people to the first milestone but some you won't. That's just business. Now you need to think about, what success looks like after seven days? For the support cohort, maybe it's forwarding support emails, having conversations is key for your second segment, and mailing more than five users will show the newsletter trialists are on track. This can be tough, but Intercom allows you to create the logic and automate the messages. And the results are more than worth the effort.

The sound of success

The first step to successful free trials is knowing what "success" looks like for your customers. Once you've asked them that, you have to ensure you have targeted support, docs, tutorials and case studies to help them

succeed. Finally you need a picture of what failure looks like, and once you see the tell-tale signs you need to step in to prevent it.

Implementing all of this correctly isn't easy. But get it right and when it comes to decision time, instead of hearing phrases like "It's too expensive", "We don't have that kind of budget", you should be hearing "Did exactly what I need", "Cheap at half the price" and "How did I do this before". And that's the sound of success.



06

Strategies for onboarding new users

CHAPTER 6

Strategies for onboarding new users

NATE MUNGER

When you're building your own onboarding, it's helpful to familiarize yourself with some particular design patterns: how other companies are teaching users about the interface, how they're demonstrating progress to the user, etc.

However, onboarding patterns should never be treated as best practice. Everything depends on the type of product you have. Some patterns work fantastically well for consumer apps, but just won't make sense in a B2B product. That's why we've put together a walkthrough of some of the most successful patterns - to explore what patterns work and when, to get you thinking about the right patterns for your product.

What happens right after signup makes or breaks any software product. Some new users expect you to welcome them and show them around. Others prefer you to get out of their way as soon as possible and let them figure things out for themselves.

The problem is that to have a product with tens or even hundreds of millions of active users, you're going to have to successfully onboard customers from across this spectrum.

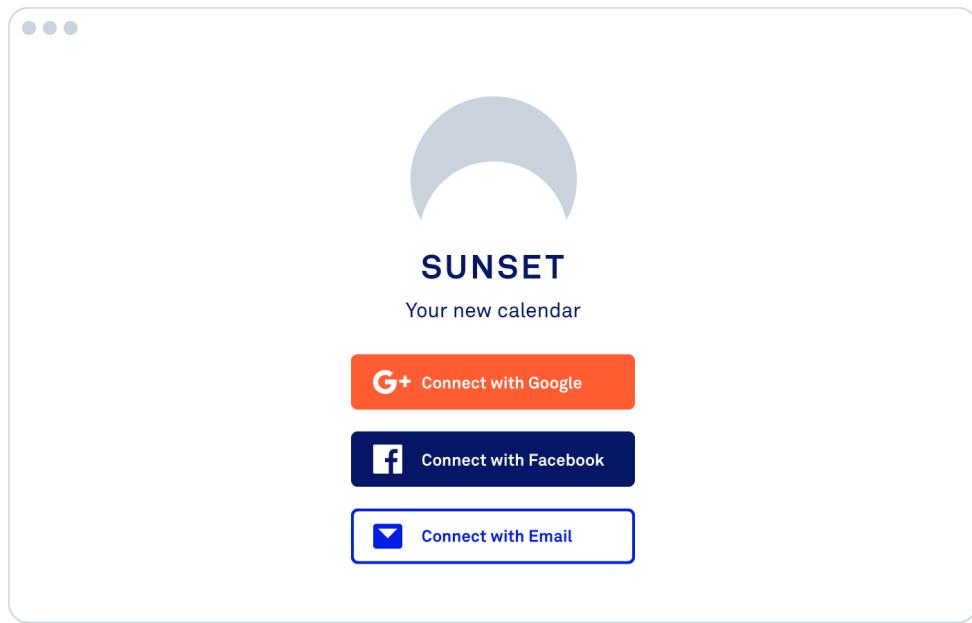
On top of that, users don't necessarily want to do the things you need them to do to become successful. You need to balance the user experience of onboarding with the friction of necessary steps such as account creation, user education, and data gathering. It's no small

challenge.

Here's a few ways you can effectively onboard customers.

1. Social login

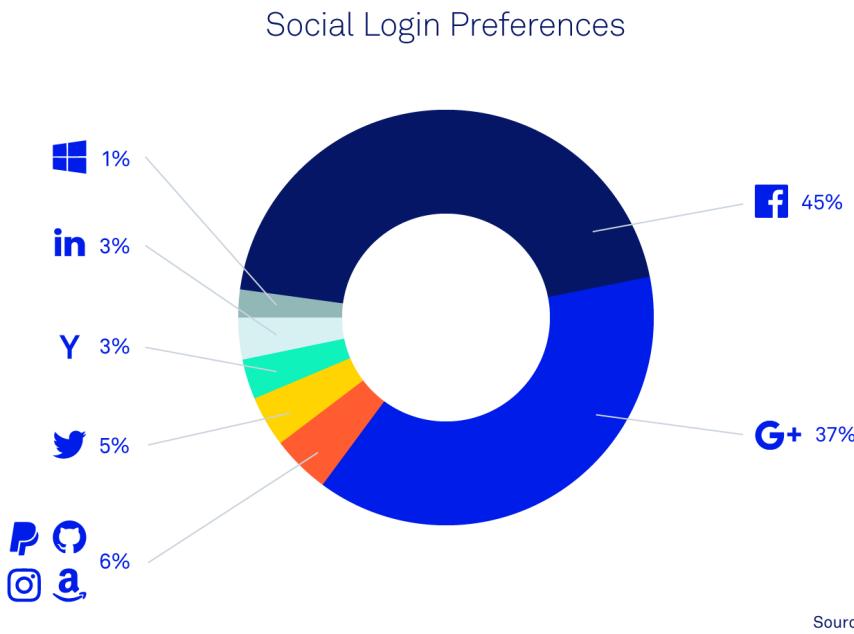
Social login offers users one-click sign up - just create an account with pre-existing social profiles like Facebook, Twitter, Google, or LinkedIn.



Social login combats one of the biggest issues facing users when they sign up - account fatigue. Social login provider Janrain found 92% of people have left a website instead of resetting or recovering login information. If your goal is any form of virality, social login is a must. Put simply, it increases the rate at which Monthly Unique Users (MUU) are becoming

Monthly Authenticated Users (MAU) - that means a higher percentage of monthly visitors are actually signing up and logging in.

Social login also lets you access and connect to a user's contacts. Instead of asking users to manually input their contacts and build a profile from scratch, leverage the existing network's infrastructure. With some simple API and export features, users can get off to an easy start.



One-click social login works. But which social login options are right for your app? Much depends on the your product. For example, Facebook is the most popular option across consumer brands, retail, music and media services.

For B2B applications, Google is the most popular. So make sure you choose the social login model that best matches your customer base.

2. Contextual tutorial

All successful consumer products have created habit-forming experiences, or so called “[desire engines](#)”. The more often a user completes these experiences, the more likely they are to “self-trigger”. You can add these desire engines to your onboarding so users form habits that will keep them coming back to your application.

Take Pinterest. Their desire engine is getting users to pin items they find interesting. It would have been easy for Pinterest to force users to click through a step-by-step onboarding tutorial. But Pinterest doesn’t place users into the tutorial immediately. They let you explore at your own pace and wait until the user clicks an image in their content feed. This triggers the tutorial.

These types of contextual tutorials give users their first taste of success and kickstart the desire engine so they keep on pinning. It’s also important to note Pinterest introduce the concept of pinning and boards. Even when users have successfully pinned an image, they’re probably at greater risk of not returning if they don’t understand these larger concepts.

If your application relies on a new concept without established patterns of behavior, be sure new users don’t leave until they understand it.

3. Clear path to completion

Whether it's numbered steps, a task-style checklist, or a progress bar, giving users a sense of how far they have to go to complete the onboarding process helps reduce abandonment. If new users know how many steps they must complete, they're more likely to complete the process.

Spotify, Quora, LinkedIn and Facebook all provide numbered steps to preview and track new user's progress through the entire onboarding process.

The screenshot shows a user interface for creating a new auto message. At the top, there is a yellow navigation bar with the following items: Engage, Auto Messages (highlighted with a red border), Manual Messages, Insights, and About. Below the navigation bar, the main area has a light gray background. A blue header bar contains the text "New Auto Message". Below this, a large white input field is labeled "Welcome message". To the left of this input field, a blue box contains the number "1" and the text "Name your message". Below the input field, there are three smaller, vertically stacked boxes, each containing a number and a step: "2 Choose your audience", "3 Select your channel", and "4 Write your message".

4. Early value for the user

A simple onboarding flow might give you lots of signups, but lots of signups doesn't always translate to lots of customers. That's why the best products don't stop with an intro tour. They [focus on the job](#) the customer is hiring your product for, and show customers how to be successful with it.

Twitter is a great example of this. Whether or not a user follows other people on Twitter is an important indicator for user retention. So Twitter encourages you to follow at least 20 other users with a single click to make sure you get the most out of the product.

New users are first shown a checklist of topics to choose from, with "popular accounts" already selected. New users that follow people and topics of interest are more likely to continue using Twitter, so they make it easy right from the start.

5. Progressive profiling

One of the best ways of reducing friction in account creation is allowing users to progressively build their profiles. You do this by requesting only the most important and necessary information during registration. It's a tricky balance to strike. Ask too much of new users and they may not complete the process. Don't ask enough and users are more likely to churn. Requiring just enough information increases the odds of retention.

"Just enough" information means you won't be giving users the complete experience from your product right away. You can see this tactic in the way LinkedIn, Facebook and Tumblr give users easy opportunities to

build their profiles over time.

LinkedIn does this by assigning user profiles a strength rating. The rating is displayed on every user profile, with a call to action to “Improve Your Profile Strength”. This gives users the chance to complete elements of the profile they left incomplete during their initial onboarding. With each step they complete, users are rewarded with an improved strength rating. As we’ll examine later though, progress should be based on what the user wants to do, not what the business wants them to do.

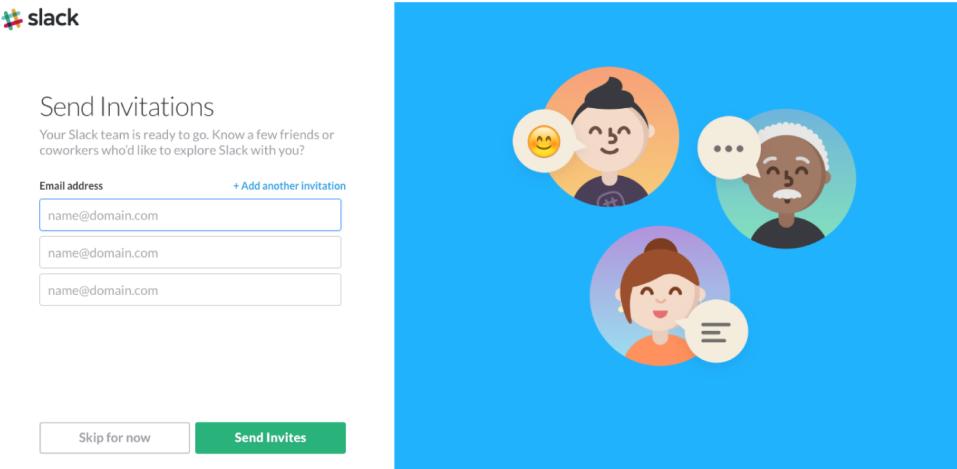
6. Connect teams

The way software is being bought is changing, and the buyer for a company often starts as an individual user. Collaborative, team-based SaaS products like Asana, Dropbox and Slack know the sooner they can connect these individual users to a team the more momentum they build toward a premium upgrade.

In each of these examples, when signing up with an email domain others have already used, new users are prompted to connect with teammates on the same domain. “Ask to join” and “Find your team” are common ways to encourage users from a company, who may not know their colleagues are considering the same tool, to connect.

Slack builds its teammate invitation right into the onboarding flow prior to letting you use the product. In this case, teammates make the tool valuable. With a simple opt in, Slack allows new users to let their teammates join without additional permissions if they’ve created an

account using a verified company email address.



Making these connections between users and their teams can really help a whole company get onboarded to your product.

The right way to onboard new users

In the end, the right kind of onboarding depends on your business model, and the answers to a few important questions:

- What do you need to know about your users to provide them with a great experience?
- What do they need to do to get value from your application?
- What are the costs and benefits of adding friction to your onboarding process?
- How will you motivate users to complete it?

- At what point in your users' lifecycle does onboarding need to be completed?
- What actions must your users take regularly to drive growth and revenue?

Answering these questions takes time and experimentation. But these examples give you a sense of where you should start.



Onboarding groups,
not just individuals

07

CHAPTER 7

Onboarding groups, not just individuals

BRENDAN IRVINE-BROQUE

Onboarding a company to your product is different from onboarding an individual user - it requires many people across departments to get setup and start seeing the value your product can provide.

If you sell your product to businesses and haven't designed your onboarding to support groups of people, you're likely asking people to complete tasks they're not capable of or lack the permissions to do. As your company grows and starts selling to larger companies, rethinking how your onboarding helps groups of people work together will have a greater impact than optimizing an existing step-by-step flow designed for individuals.

If you build software for business one of your main jobs will be to onboard groups of people at a company. Your beautiful, linear sequence of onboarding steps might work well for individual users, but teams behave unpredictably.

So as larger companies start using your product, instead of just asking “How many people made it from step A to step B?”, you might start asking different questions, such as:

- Why would someone in a group be unable to complete this step?
- Who in their company might be able to help them?
- What is blocking them from asking for help?

We've asked ourselves these questions as Intercom has grown. Our customers have become increasingly diverse in size, which has affected the order in which we previously expected common actions to be done.

Early on the vast majority of our customers were small startups and our onboarding reflected that - it was designed to help one engineer install a JavaScript snippet. But our customers are no longer small startups working out of one room. We have to onboard companies where it may require more than one person to code, authorize integrations and teach teams how to use our products.

We've learned great onboarding acknowledges that different groups of people take very different paths to get started, and gives them multiple paths for them to progress as a team.

Designing a predictable set of steps for unpredictable groups

The mistake most companies make is trying to model their onboarding as an ordered series of steps. They have a very definite idea of what step should be completed in what order. This one linear sequence of steps quickly breaks down for groups of people.

Not convinced? Let's say you're building an iPad app for a reception desk that lets guests sign in and notifies employees when they arrive. In order to be set up, a new customer might need to:

- Sign up for an account

- Enter a credit card to start a trial
- Authorize Google Apps access to get employees email addresses
- Add a legal document or NDA for visitors to sign
- Place the iPad in a stand at the front desk

Completing all of these requires participation from:

- Someone with access to a company credit card
- Someone with administrative access to the Google Apps account
- Legal counsel
- Office manager(s) or receptionist(s)

At a very small company, this could be just 2-3 people. At a larger company, it could be dozens.

Let's see what happens if you make the mistake of modeling these steps in a linear way.

1. Sign up for an account
2. Enter a credit card to start a trial
3. Authorize Google Apps access to get employees email addresses
4. Add a legal document or NDA for visitors to sign
5. Place the iPad in a stand at the front desk

If someone without a company credit card signs up, they'll be stuck on

step 2. At a company of 100 people, that might be 80% of people who could possibly sign up for your product. The same holds for the rest of the steps - the potential for failure is massive. Who has permissions to connect Google Apps? Who knows our lawyer's email? Who has the stand for the iPad? Who is it I can ask for the credit card again?

Modeled in this way, as a blocking sequence of steps, there's only one person at the company who could complete every step, unassisted - the CEO. And if the only person at a company who can complete your onboarding is the busiest person, with the least time, you have a problem.

We had a similar problem at Intercom as we grew. Previously, in order to sign up for an account, we made people add a code snippet or import data from a CSV or third-party service. In some ways, this a good thing - we were able to show customers Intercom working on their own website or app right away.

But it also meant we blocked anyone who couldn't add a code snippet or import data from doing anything else. Once we changed this to allow *anyone* to create an account right away, and then add a code snippet or data import afterwards, more people were able to make more progress through our onboarding.

How to expect unexpected paths

Since it's hard to predict who will do each task, or which order tasks will be completed in, designing onboarding means designing for a moving target. It requires the humility to know that it will never be perfect. This

is especially true for a growing company, whose customers are increasingly diverse and often get larger overtime.

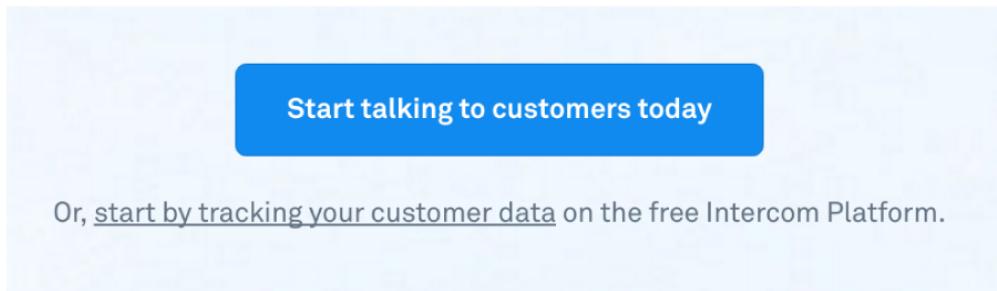
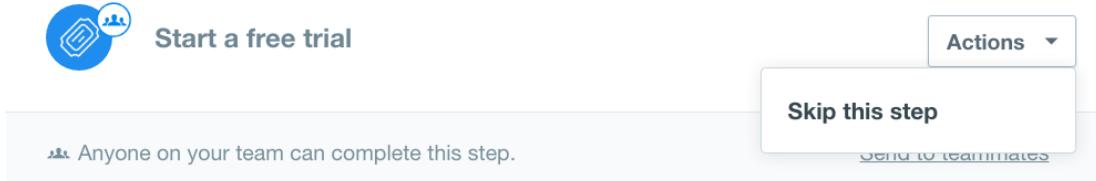
That said, we've found three strategies that work for dealing with the unexpected paths our customers take in the onboarding process.

1. Provide an escape hatch

While you have a new customer's attention, allow them to accomplish as much as they are capable of or have permission to do, right away.

It's hard to recapture this attention, to get them to come back to your product, especially to do something boring, like enter a credit card or create an API key. So while you have their attention, provide ways for them to skip to other steps they can accomplish.

Remember, it's almost always better to let people keep moving and exploring. The conversion rate lost on one small step is made up by the customer's overall progress and comprehension of what your product has to offer.



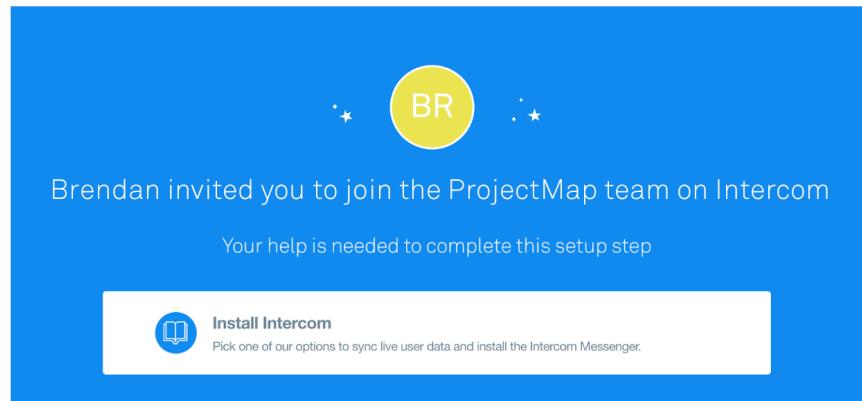
2. Unblock steps with invites

You should presume that not everyone will have the ability or permission to complete every step, and provide ways for users to invite the people they need to help them.

Prompting people to invite coworkers means asking the customer to give up some of their social capital - you're asking them to ask another person for a favor, to take time to setup an account and learn something new.

That's why it's important to provide some context - explain why someone is receiving an invite, and what they've been asked to do. And while it might look old-school, providing links can give people more

direct control over how they choose to invite others.



3. Identify and empower an onboarding leader

Without organization and leadership, groups of people have a natural entropy - people disagree, have different priorities and get less done. Chances are, trying out your product is the last thing on the roadmap, and not even something everyone agrees on.

When someone tries your product, it's your job to find a leader and empower them to organize their team around getting setup with your product.

The solution here doesn't always start with building more software or writing code. At Intercom, identifying and empowering an onboarding leader starts with our sales team. Sales teams traditionally try to find the "champion" in a company, the person willing to fight through obstacles to adopt a new product and close the deal.

If you're responsible for your product's onboarding, you can learn a lot by finding out what questions your sales team use to identify champions, and also the resources they provide to help them convince others on their team.

When you it comes to onboarding, it's easy to think everyone will follow the linear paths you've wireframed. But groups of people rarely follow such neat paths. Instead, you should assume at each step of your onboarding that the task at hand may be someone else's job. That way, you can build a flexible onboarding that adapts to different kinds of people, and support larger companies too.



How your organizational structure impacts onboarding

00

CHAPTER 8

How your organizational structure impacts onboarding

MARK ANDREWS

As a company scales, the onboarding experience inevitably increases in complexity, as the different teams responsible for it alter it to increase the success of their product or feature. Inevitably, this leads to increased complexity for the customer.

If you're not careful, you end up with a hodgepodge experience with disjointed content and context that can confuse. When this occurs, you have failed to achieve what the business and your customer actually require - getting the customer to an outcome they desire.

You don't have to look for long to find poor onboarding experiences. Many of the world's best known consumer technology brands suffer from them. But don't worry; it's possible to structure your teams so they're aligned to create the best experience. You can make your entire organization work for you to create an optimal customer onboarding flow.

Earlier Des explained how focusing on the customer will reveal a lot of low-hanging fruit in your product that will up your onboarding game. This low hanging fruit lies not just within the product but within your organization as well.

When was the last time you asked a teammate to run through your product's onboarding flow and critique the experience? It's unlikely to have been anytime recently. For most of us onboarding our own product is something we do once and quickly forget about.

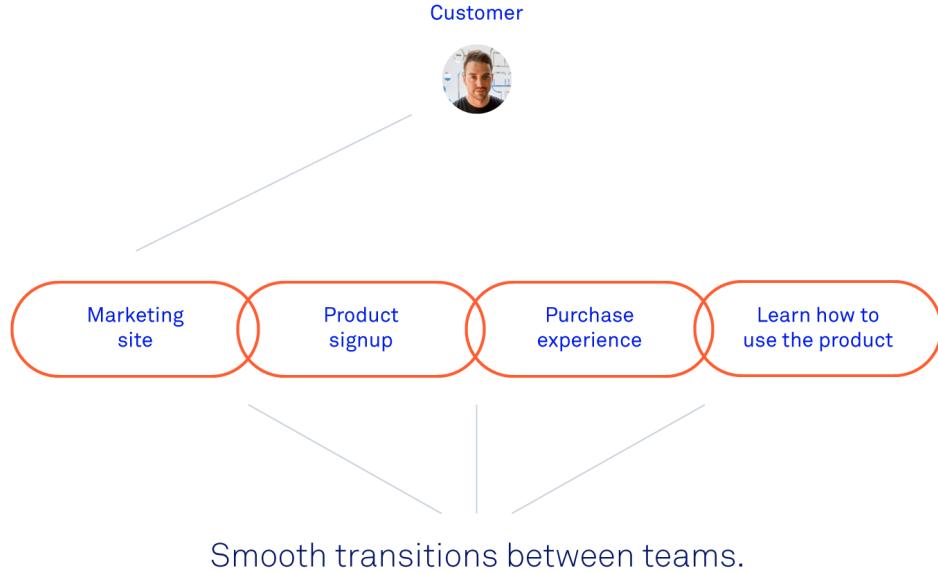
But unless you keep revisiting this flow over and over again, it's easy to lose touch not just with your customers' experience, but also with the teams who create it.

Does your onboarding look like an office directory?

For example, we recently asked a number of teams at Intercom to reacquaint themselves with the experience of setting up a product. After all, even for those who have worked at Intercom for a while, it wasn't a flow they were likely to remember a lot about. Viewing the onboarding experience with fresh eyes, I noticed how the transitions between certain parts were jarring, and in some cases, plain wrong.

For one of our products, [Acquire](#), customers were placed in the wrong part of Intercom once it was fully configured. When a customer installed a single Intercom product, the onboarding UI still referred to all Intercom products, even presenting install options that didn't apply. If I could see these inaccuracies, it's likely hundreds of customers had found them too.

What struck me was that most of these mistakes were not down to design and engineering oversights. Instead, they exposed how different parts of the onboarding were handed off between our marketing, growth, and product teams. It was like reading an office directory - you could literally see the organizational structure of Intercom in our onboarding.



Multi-team onboarding - the wrong way

Your product onboarding experience might reflect your own organizational structure too. Here are some things to look out for:

- The navigation for your product's marketing website reflects the separate teams within the company.
- The visual style of your marketing site isn't carried through to the setup and onboarding experience of your product.
- Customers are confused when moving from one stage of the flow to the next because the content and context doesn't reflect where they just came from.
- There are multiple redirects between different parts of the onboarding flow.

- Customers arrive in your product and don't know what to do.

A customer doesn't care if marketing owns the page before signup and product owns the page after signup. They only care about one thing - using your product successfully to produce an outcome they desire.

When focus leads to silos

This is easy when you're a startup with 10 people in one room. Everyone is working towards the same roadmap and there's little product collateral to maintain. "Push it live and get people to use it now" is the mantra. But as a startup grows, specific teams are created to deliver concentrated value - engineering, marketing, sales, product, etc. This allows teams to focus on specific problems more thoughtfully than an ad-hoc group can.

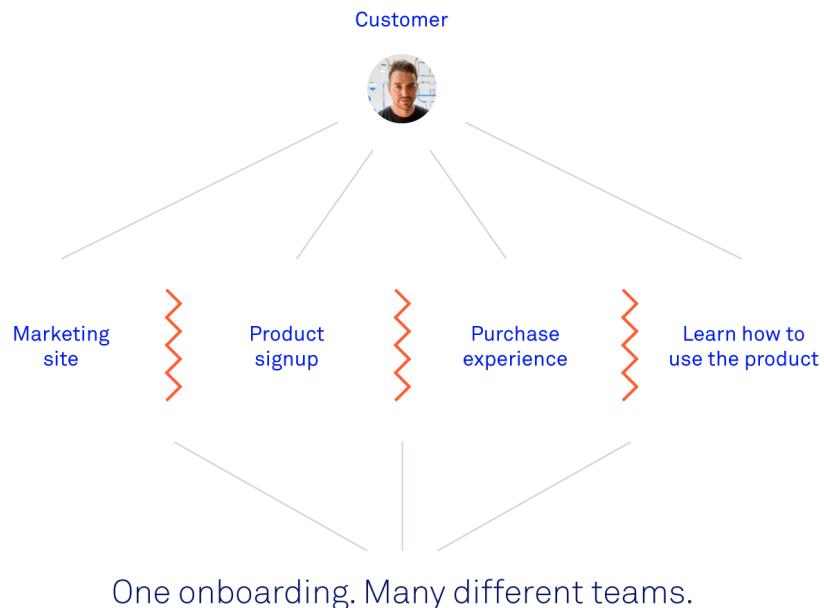
Focus helps product teams solve more specific problems but it may not lead to coherent experiences overall. It can also lead to silos where your onboarding is a collection of disparate pieces that make little sense to your customers when placed together.

Consider marketing landing pages, account creation, payment, initial product setup and finally, initial use of the product itself. When a startup begins to scale, focus dictates that many of these steps be owned by separate teams. Yet successful onboarding is a direct result of how effectively each of these teams work together - not how each team is able to optimize their own piece of the flow.

It's easy for teams to think within their own focus area, since they can

more easily deliver a great result within their own domain. Creating the best experience relies on each of them working together to establish good continuity throughout the entire flow, particularly at these transition points.

Setting teams up for successful transitions



Multi-team onboarding - the right way

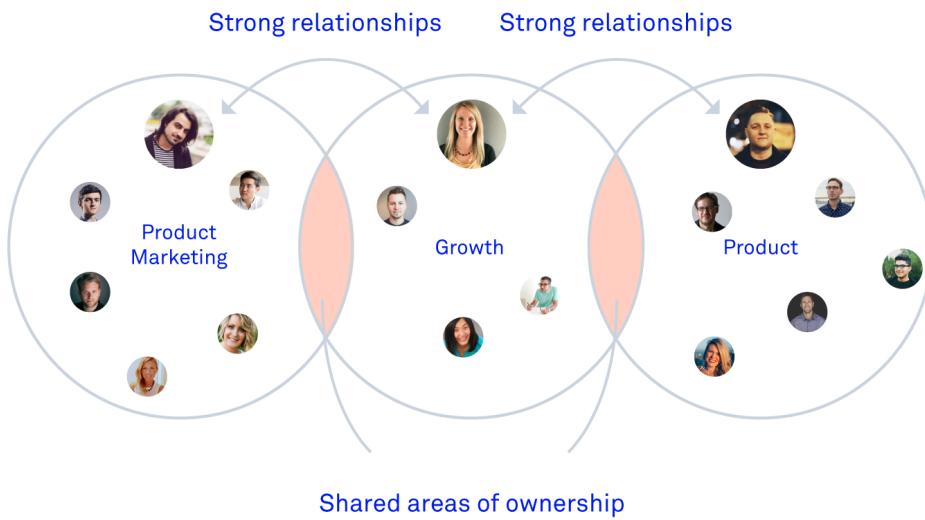
So how do you organize your teams to create a seamless onboarding experience? Here are some steps you can take:

- **Periodically review the entire experience.** Each team responsible for a part of the onboarding flow should review the entire experience end-to-end. This is good for context, so there's an awareness their part of

the process needs to work well with the rest of it. It also helps reveal awkward transitions between different areas of ownership so they can be addressed.

- **Assign one onboarding owner from each team.** It's critical organizational alignment is created where key people share responsibility for the onboarding flow. The more teams and owners that proliferate, the more silos occur. When you hear people deflecting responsibility, "Oh, you gotta talk to the growth team about that", rather than, "Let's work with the growth team on this together", you know you have an issue. Organizational alignment creates a structure that increases the likelihood of success.
- **Align each team behind a shared goal.** If one team's goal is to educate the customer, and another's is to get them through signup as quickly as possible, you can see how cracks in an onboarding flow might occur. Make sure each owner agrees with and works towards the same goal i.e. create the most intuitive, efficient and delightful onboarding experience that results in higher customer conversion.
- **Enforce domain overlap.** Most companies like to box off responsibilities for each team so they can focus on their specific problem. Onboarding doesn't have that luxury - team overlaps need to be woven together. Instead of fighting these overlaps, iron them out so there's a smooth transition. In our example, the marketing and growth teams might be responsible for the start of the signup flow and product might be responsible for teaching the customer how to use the product once they buy it. By creating a shared responsibility at each transition point, we create a better model for a more fluid onboarding flow end-to-end.

Customer onboarding experience



Your customers need the most attention right up until they see the value of your product. Successful onboarding isn't simply getting your customers to pay; it's proving the value of your product once they start using it.

This means onboarding is one of the most important and complex product flows you will ever create. It also falls under the remit of several teams, increasing its complexity.

We presented three ways - team alignment, goal alignment and domain overlap, to help your organization work for you. Get it right and your onboarding will be set up so that each team shares responsibility for creating the best experience possible. Use your organization to master your onboarding experience and you'll not only end up with happy customers, but with a meaningful impact on your business.



09

Onboarding never stops

CHAPTER 9

Onboarding never stops

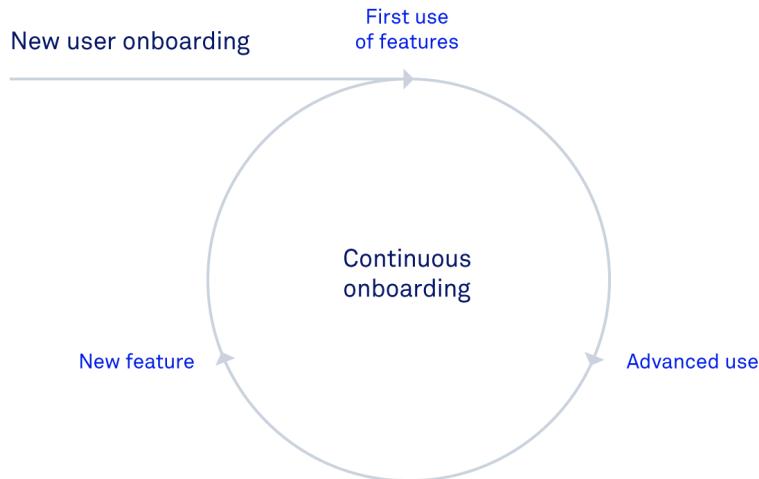
RUAIRÍ GALAVAN

As your product and service offering evolves and changes over time, you'll invest money and time in new features, big product launches and expensive release cycles. But beware: the vast majority of new features flop - because they never get used.

Fun fact: when Microsoft asked their users what they wanted added to Office, they found 90% of the requested features were already there. They had just done a terrible job of onboarding the right users on to the right features at the right time.

“New improvements” sit unappreciated, unused, and are eventually cast aside. You need to fight for usage, by onboarding your current customers to your new features. But done wrong, you run the risk of annoying more customers than you delight.

When we think about onboarding we usually don't think beyond signup. In reality, your onboarding is just getting started. You haven't turned users into experts, and they haven't yet given up all the other products they used before yours. If you only focus your onboarding efforts on new signups, you're leaving a massive opportunity on the table - passionate, engaged customers.



For example, let's say somebody has been using your product for six months. They're totally engaged and up to speed. But then you release a brand new feature that can make them even better. That's an onboarding opportunity right there. Ultimately, good onboarding retains customers over time by continually showing them how to get the most out of your product.

We recently experienced this when we launched our new feature, [Smart Campaigns](#). We knew it had the potential to improve almost all our customers' definition of success - personal customer communication at scale. This gave us a significant onboarding opportunity - we could deliver more value to our existing customers.

The challenge was that Smart Campaigns was not an easy concept to understand. If the beta period taught us one thing, it was that a certain amount of hand-holding was required. The easy path would have been to ignore this and send a once off feature announcement email to all our

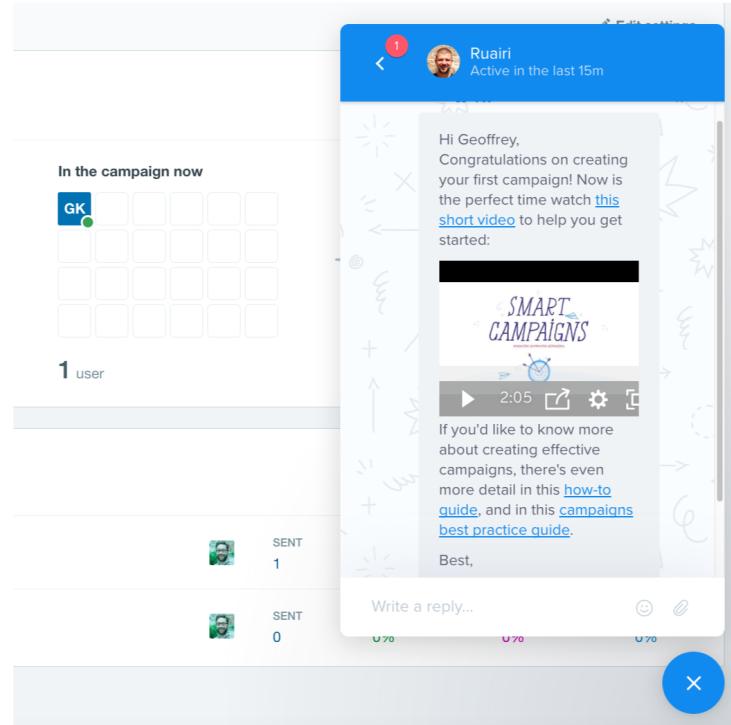
customers. But that meant we risked Smart Campaigns becoming a feature only a few customers ever looked at.

That's why we set out to carefully and consciously onboard existing users to Smart Campaigns. Our approach was to make just enough information available at every turn, but also stay out of the way. Here's a few ways we did that.

Onboard in context

It's a common mistake for companies to launch features in products without any context. Your goal should never be "get it launched". Your goal is "get it used". That's why the right time to promote an improvement is not only when someone is in your product, but when they're in a position to use it.

For Smart Campaigns, we announced the new feature to customers when they arrived in the messaging area of Intercom, via an in-app announcement. That message contained a video with a high-level overview of the feature and instructions to get started. Like all good onboarding messaging, it's closely modeled on just-in-time information - teach in the moment when specific information is actually useful.



Use educational content to onboard

When explaining new concepts, it's important to give users a sense of what success looks like. It's a familiar technique used in onboarding - giving users educational content as a blank slate. Take Trello, for example. Users are given a welcome board with pre-made to-do cards, with each card explaining a different interaction. They use content and the interface to teach you how to use the product.

Not only is it a great way of providing a warm and human experience of your product, it encourages action and tees your customers up for success from the word go. This is a far better approach than saying, "Your campaign is empty and that's all I'm going to say." You would never say

that in person to your customer, so why say it in your product?

When a customer encounters a campaign for the first time, there is an example campaign created when they get there - with best practice tips and links to helpful guides.

Then, when a customer creates a new campaign, and sees a blank campaign for the first time, we signpost them to a guide for creating engaging messages. This is easily dismissed, but it's helpful content in the right place at the right time for those who need it.

Anticipate the next questions

In education, the more you hold someone's hand, the less their brain will engage. The same goes for onboarding - if you keep spoonfeeding users solutions, don't be surprised when they can't pick up a knife and fork. That's why it's better to give information as gradual hints, so new users can more deeply retain what they've learned.

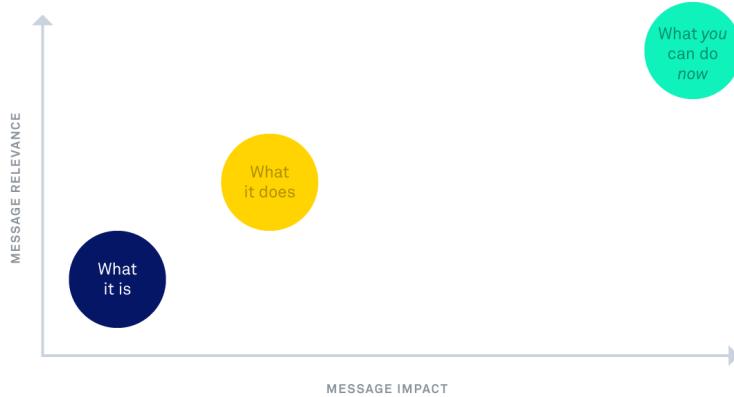
One of the best ways to do this is to center information around the intent of the customer. For example, when a customer creates a new campaign, by clicking on the create button they've shown intent. With new users interested, now is a good time to start sharing more advanced information like best practice guides. This type of careful consideration really does drive engagement.

Gradually expose features over time

Onboarding users to a new feature requires the same skill as onboarding them to a new product. You wouldn't welcome new users to your product by asking them to do complex tasks only a pro user would be able to do. So don't overload users when you're onboarding them to a new feature either.

Think about a game like Super Mario Bros. At any given point, only the necessary parts of the game are on screen, allowing players to gradually and naturally understand what's going on around them. As you make progress, only the next piece of relevant information is exposed. Imagine you saw the entire level as soon as you started playing? Front loading your users with information will make sure they never get past the first few hurdles.

For example, Intercom users don't need to know about our keyboard shortcuts until they've been in the inbox for a while and have started to deal with a heavy load of user conversations. It's certainly not a day one announcement. Similarly they probably don't care about our bulk data export feature until they're tracking a bunch of data.



The best way to tell a customer how to do this stuff is after you've gathered evidence that they're a good candidate to hear about it.

Converting today's signups into tomorrow's engaged users

When you're building software, remember there are hundreds of products competing for the same job. If you're not continuously showing your customers how to get value out of your product, you're not encouraging product dependency. You're leaving the door open for someone else to come in and persuade them their product is more valuable than yours.

That's why you need to continuously onboard existing customers, bringing people all the way through, and making sure they get as much value as they can.

Conclusion

The number one mistake every business makes with onboarding is thinking from the inside out. Instead of starting with the outcomes a customer wants, they start with a model of a profitable customer and try to reverse engineer what needs to happen to get them there.

Over the past five years, we've discovered the only proper way to onboard people is to understand where they are, what capabilities they have, where they want to get to, and then use a combination of interface, communication, tooltips, nudges, and messages to ensure they're never stuck on the path to achieving their outcome. That's what successful onboarding looks like - unifying a successful business outcome and a successful customer one.

I hope these chapters have shown that onboarding is everyone's job and getting users set up is only one piece of the puzzle. If marketing can't describe the outcome customers are looking for, if product can't build a signup process people understand, if customer support can't help get to those successful outcomes, onboarding breaks down. So many forces feed into onboarding, so don't trick yourself into optimizing one small sliver of your onboarding and ignoring the others.

When you think about it, it doesn't matter how good your product is, without onboarding it's meaningless. Onboarding is the bridge between the user's stage of desire for value and the value they actually get - that's what makes software successful.

If you've had similar experiences with onboarding at your company, I would love to hear from you. I'm des@intercom.io - drop me a note.

Des Traynor, Co-Founder, Intercom

Enjoy this book? Why not download our others?



We've written books on product management, customer support, customer engagement and Jobs-to-be-Done. Read by smart people at companies like Google, Dropbox, Github, Twitter, Facebook and New Relic, they're packed with hundreds of brilliantly simple tips on how to run your business. [Download your copy free today](#).



Help them get there.

From the moment they sign-up, customers want to use your product to deliver an outcome they need. Get them to that “ah-ha!” moment, and they’ll never look back.

That’s why we’ve built a whole product to help businesses onboard their customers the right way, and guide them to these successful moments.

With Intercom Engage, you can guide every new user through the first steps in your web or mobile app, and automatically send email and push notifications to people who drop-off to get them back on track.

