



USER ONBOARDING

QUICK GUIDE

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<http://Onboarding.Pro>

ABOUT THIS GUIDE

**THIS GUIDE IS NOT A BOOK,
IT'S A CHEAT SHEET**



WHAT IS USER ONBOARDING?

WHAT IS USER ONBOARDING?

IT'S HOW TO GET YOUR
USERS TO SUCCEED WITH
YOUR PRODUCT

WHAT IS USER ONBOARDING?

USER ONBOARDING =

MORE USERS

CONVERT INTO CUSTOMERS

FASTER

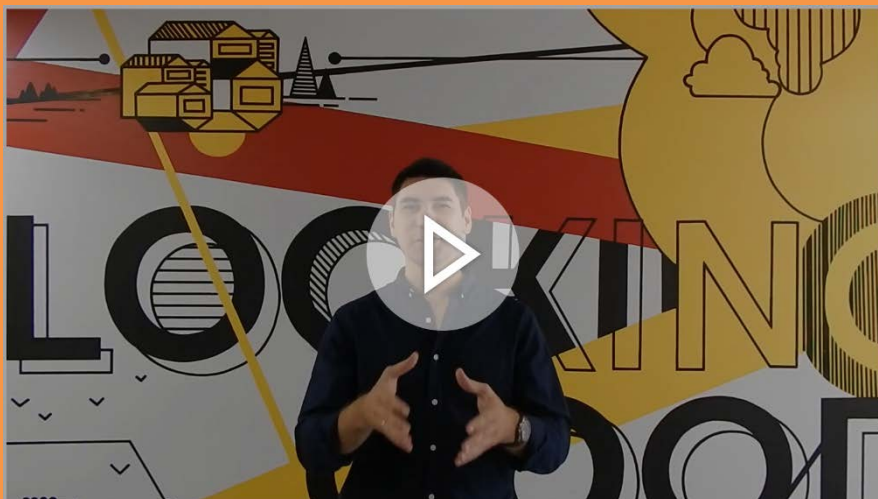
WHAT IS USER ONBOARDING?

USERS DON'T CARE ABOUT
YOUR PRODUCT

THEY CARE ABOUT THEM

WHAT IS USER ONBOARDING?

USERS HIRE YOUR
PRODUCT TO SOLVE THEIR
PROBLEM



CHECK OUT JETWAY

A 7-episode video course + workbook for creating great user onboarding experiences

GET JETWAY

WHAT IS USER ONBOARDING?

THEY NEED TO SEE YOUR
PRODUCT SOLVES THEIR
PROBLEM

AND SEE IT QUICKLY

WHAT IS USER ONBOARDING?

USER ONBOARDING =

HELPING USER SEE YOUR
PRODUCT SOLVES
PROBLEMS

WHAT IS USER ONBOARDING?

USER ONBOARDING =

HELPING USER WIN
FIRST TIME (S)HE USES YOUR
PRODUCT

WHAT IS USER ONBOARDING?

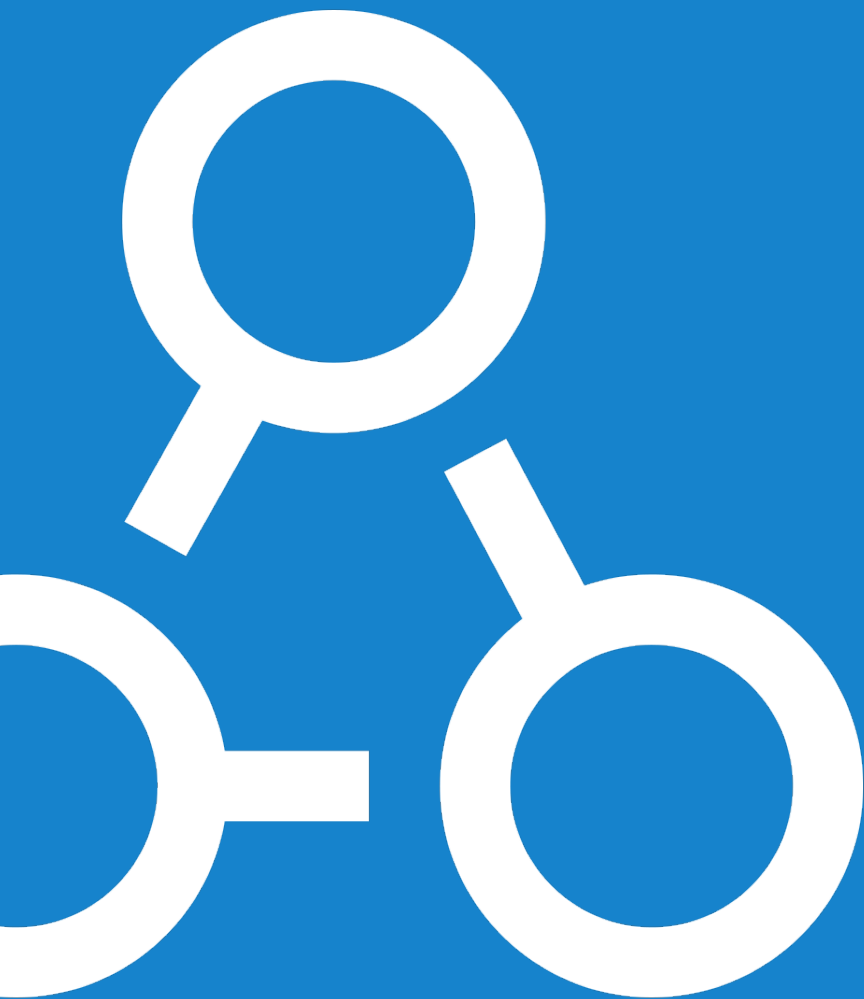
USER ONBOARDING =

DELIVER ON YOUR
MARKETING PROMISES
(EVEN JUST A LITTLE)

RIGHT AFTER SIGN UP SO
USERS STICK AROUND

WHAT IS USER ONBOARDING?

**MARKETING GETS SIGN UPS,
ONBOARDING CONVERTS**



3 STEPS TO USER ONBOARDING

3 STEPS TO USER ONBOARDING

STEP 1:

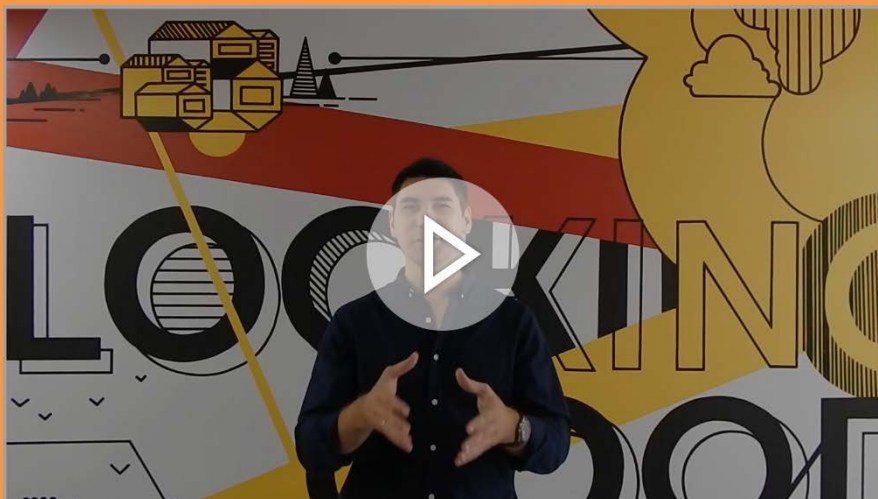
LEARN ABOUT YOUR USERS

3 STEPS TO USER ONBOARDING

STEP 2: DESIGN AND TEST YOUR ONBOARDING FLOW

3 STEPS TO USER ONBOARDING

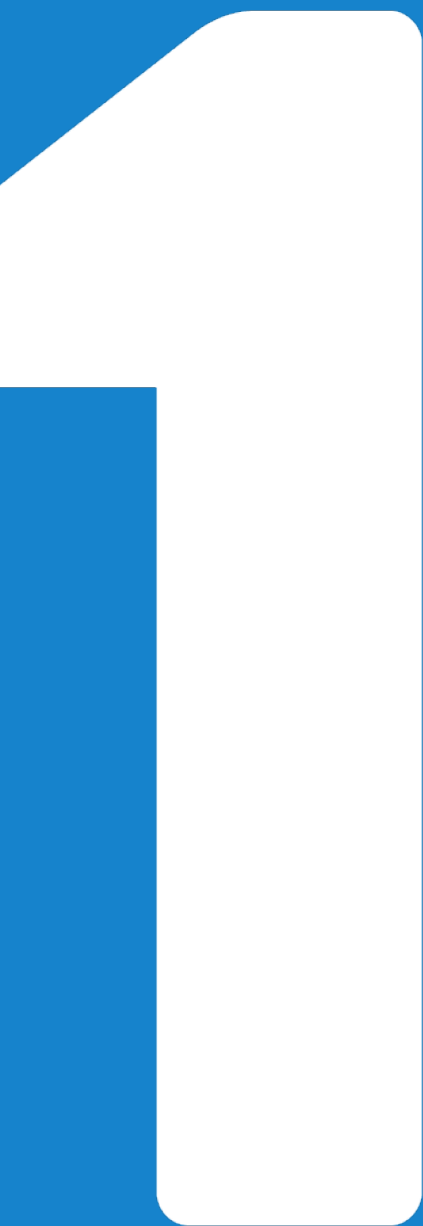
STEP 3: MEASURE PERFORMANCE AND ADJUST



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GET JETWAY



STEP 1
DO YOUR HOMEWORK

STEP 1: DO YOUR HOMEWORK

LEARN ABOUT YOUR USERS

STEP 1: DO YOUR HOMEWORK

**HOW DO THEY DEFINE
THEIR PROBLEM?**

IN THEIR OWN WORDS

STEP 1: DO YOUR HOMEWORK

HOW DO THEY GOOGLE
THEIR PROBLEM
(SOLUTION)?

STEP 1: DO YOUR HOMEWORK

HOW MUCH DO THEY KNOW
ABOUT YOUR PRODUCT?

WHAT EXPECTATIONS THEY
ARE COMING WITH?

STEP 1: DO YOUR HOMEWORK

WHAT OTHER PRODUCTS
DO THEY USE?

i.e. WHAT INTERFACES ARE
FAMILIAR TO THEM?

STEP 1: DO YOUR HOMEWORK

HOW DO THEY DEFINE
SOLUTION TO THE
PROBLEM?

STEP 1: DO YOUR HOMEWORK

WHAT DEMONSTRATES
SOLUTION FOR THEM?

WHAT NEEDS TO HAPPEN,
STEP-BY-STEP?

STEP 1: DO YOUR HOMEWORK

WHICH FEATURE OF YOUR
PRODUCT WILL
DEMONSTRATE THE
SOLUTION BEST?

STEP 1: DO YOUR HOMEWORK

WHAT IS THE VERY FIRST
USER SUCCESS POINT IN
YOUR PRODUCT?

i.e. WHAT WILL MAKE USER
SAY: IT WORKS, OR BETTER
YET: WOW! THIS IS
AWESOME!



STEP 2
DESIGN IT

STEP 2: DESIGN IT

BEGIN WITH SKETCHES AND WIREFRAMES

Pen & Paper

<http://moqups.com>

STEP 2: DESIGN IT

YOUR JOB IS TO CREATE A
STRAIGHT PATH FROM SIGN
UP TO SUCCESS POINT



LANDING PAGE



REGISTRATION



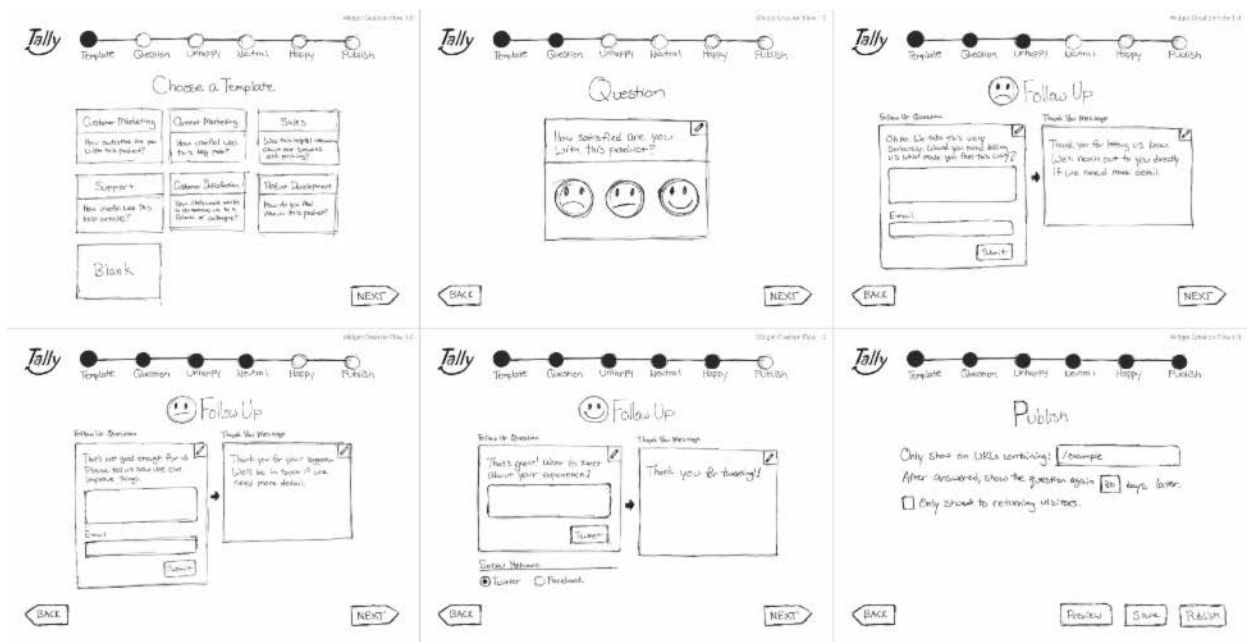
ACTIVATION:
1ST VALUE



ENGAGEMENT:
RECURRING
VALUE

STEP 2: DESIGN IT

MAP USER JOURNEY FROM SIGN UP TO SUCCESS, SCREEN-BY-SCREEN



STEP 2: DESIGN IT

**TRY TO MAKE IT AS SHORT
OF A JOURNEY AS POSSIBLE**

STEP 2: DESIGN IT

**HELP USERS ACHIEVE GOAL
WITH MINIMAL EFFORT**

STEP 2: DESIGN IT

A FEW TIPS

STEP 2: DESIGN IT

MAKE SIGNING UP EASY

DO YOU REALLY NEED ALL
THAT INFORMATION
UPFRONT?

STEP 2: DESIGN IT

BREAK UP LONG TASKS

**IF YOU NEED A LOT OF
ACTIONS, BREAK THEM
DOWN INTO SEVERAL
SEQUENTIAL SCREENS**

STEP 2: DESIGN IT

EXAMPLE:

Virgin's new booking site

One decision at a time makes
it **faster**



STEP 2: DESIGN IT

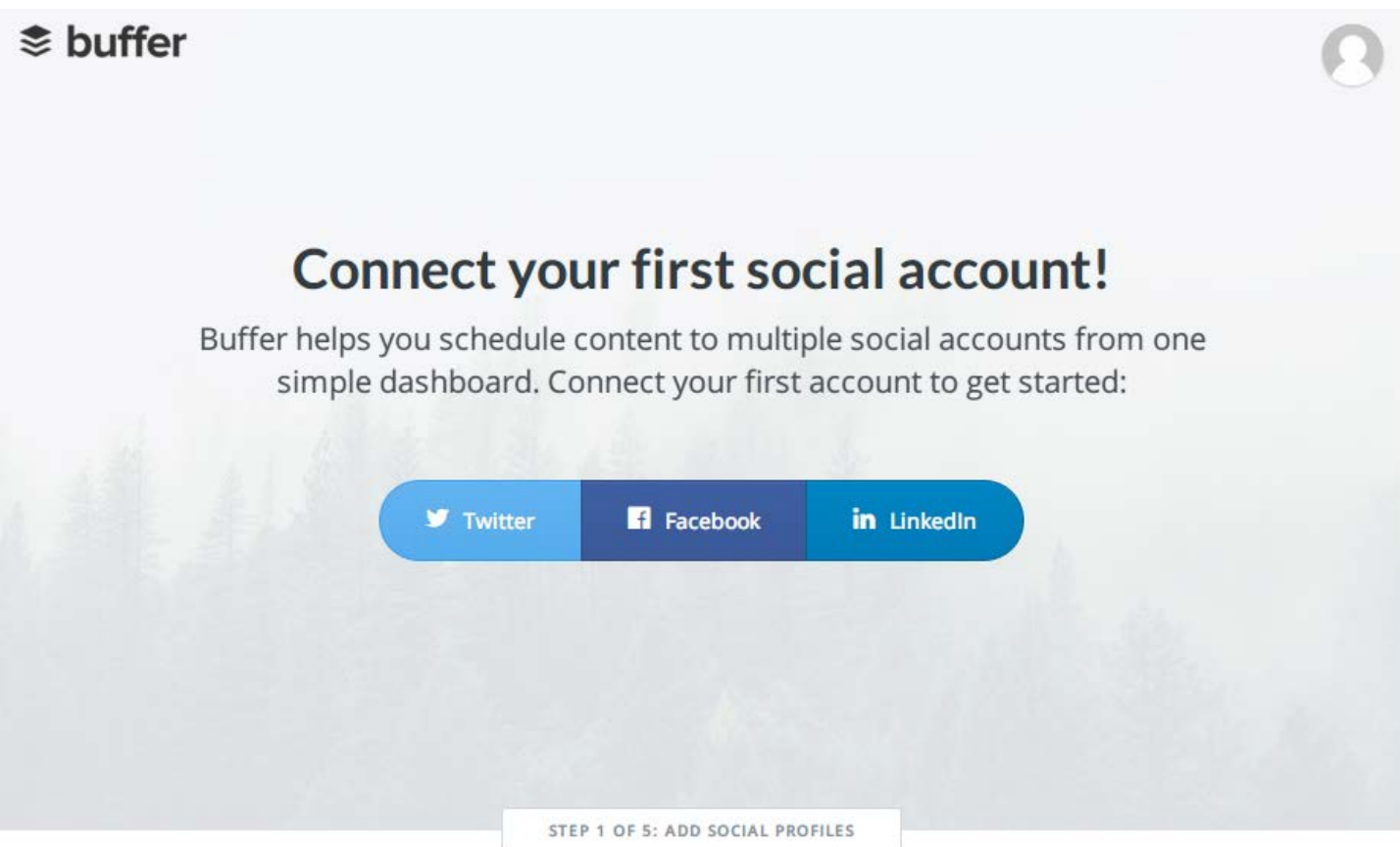
REMOVE DISTRACTIONS

IF A FEATURE DOESN'T GET
USER CLOSER TO GOAL
HIDE OR DEEMPHASIZE IT

STEP 2: DESIGN IT

EXAMPLE:

Buffer's onboarding process



STEP 2: DESIGN IT




SIMPLIFY INTERACTIONS

MULTIPLE CHOICE VS.
MANUAL INPUT

STEP 2: DESIGN IT

EXAMPLE:

[Try booking at Tripmydream](#)

With:  1  -  -

| Adults | Children under 12 years | Children (age 0-2) |
|--------|-------------------------|--------------------|
| 1 | - | - |
| 2 | 1 | 1 |
| 3 | 2 | 2 |
| 4 | 3 | 3 |
| 5 | 4 | 4 |

STEP 2: DESIGN IT

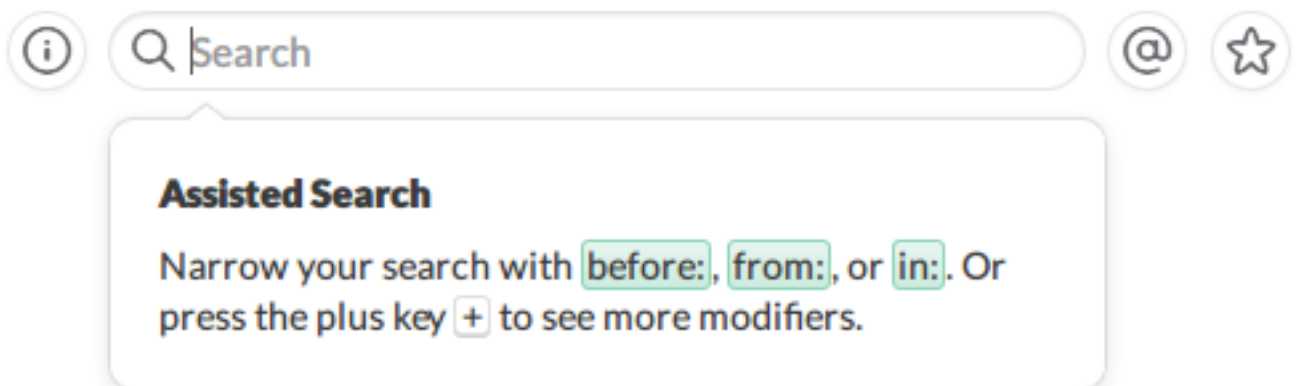
**ANSWER USERS' “WHY?”
QUESTIONS**

**PROVIDE RELEVANT
INFORMATION IN CONTEXT
OF THE PAGE OR TASK**

STEP 2: DESIGN IT

EXAMPLE:

Slack's search tips



STEP 2: DESIGN IT

**ALWAYS SHOW WHERE TO
GO NEXT**

**PLACE TOOLTIPS OR
SIGNAGE TO INDICATE
WHAT TO DO NEXT**

STEP 2: DESIGN IT

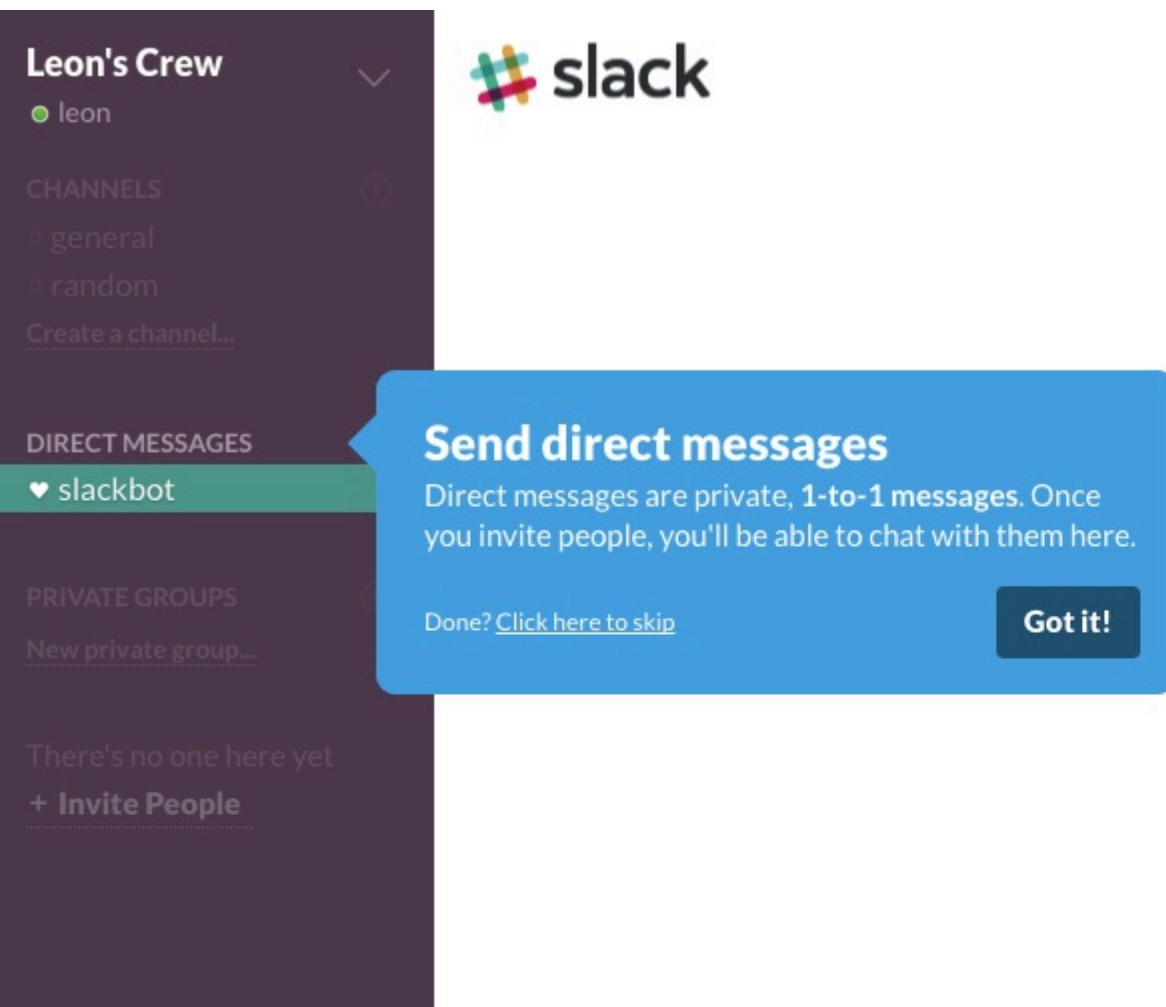
PRO TIP:

STEP-BY-STEP TOURS ARE A BAD IDEA. INSTEAD PROVIDE ONE-OFF MESSAGES BASED ON USER ACTIONS.

STEP 2: DESIGN IT

EXAMPLE:

Slack's onboarding messages



Slack i

C

STEP 2: DESIGN IT

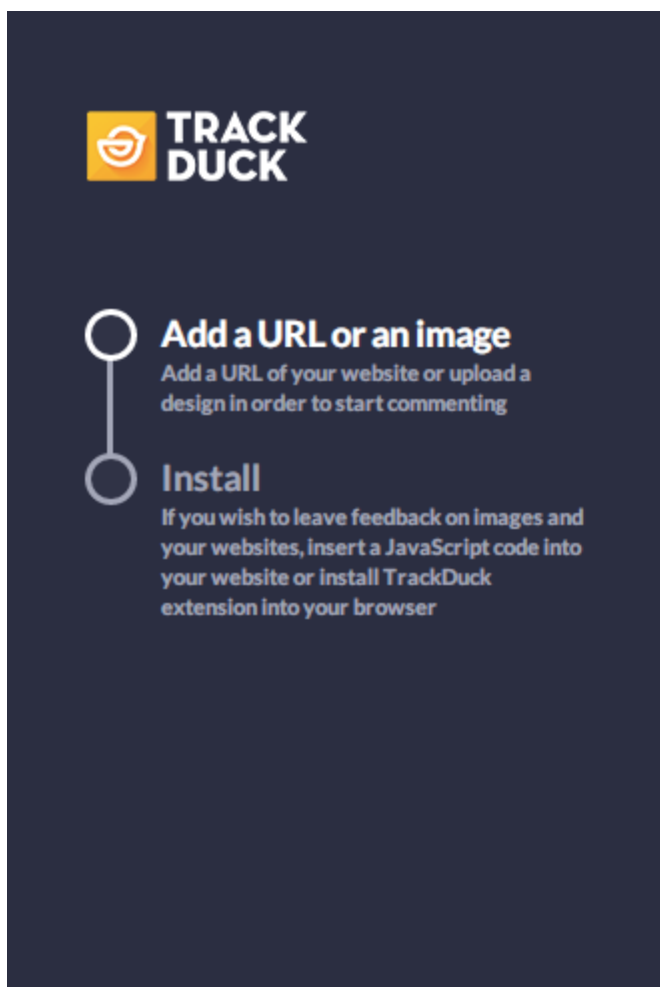
INDICATE PROGRESS

USER MUST KNOW HOW
MUCH MORE TO GO

STEP 2: DESIGN IT

EXAMPLE:

Trackduck's sign up process



To start using

Enter a URL address o

demo.trackduck.c

Enter your website URL or leave a b
our demo page for trying out TrackD

STEP 2: DESIGN IT

CONFIRM ACTIONS

USER MUST KNOW IT
WORKED... OR DIDN'T

...AND WHAT TO DO NEXT

STEP 2: DESIGN IT

CELEBRATE MILESTONES

LET USERS KNOW THEY'VE
SUCCEEDED

STEP 2: DESIGN IT

EXAMPLE:

[Mailchimp's mail campaigns](#)



High fives!

**Your campaign is in the
send queue and will go out shortly.**

3

STEP 3
TEST, MEASURE &
FINETUNE

STEP 3: TEST, MEASURE, FINETUNE

**TEST YOUR SKETCHES AND
WIREFRAMES ON USERS**

**5 USERS IS ENOUGH TO
REVEAL 80% OF PROBLEMS**

STEP 3: TEST, MEASURE, FINETUNE

**CREATE MEASURABLE TEST
CRITERIA TO GUAGE
SUCCESS RATES**

STEP 3: TEST, MEASURE, FINETUNE

DON'T HELP YOUR USERS
DURING TESTING

OBSERVE WHAT THEY DO
OVER WHAT THEY SAY

STEP 3: TEST, MEASURE, FINETUNE

LOOK FOR POINTS OF
FRICTION

WHERE DO USERS TEND TO
STALL?

STEP 3: TEST, MEASURE, FINETUNE

ITERATE

MAKE IMPROVEMENTS AND
TEST AGAIN ON NEW USERS

STEP 3: TEST, MEASURE, FINETUNE

GET READY TO LAUNCH

STEP 3: TEST, MEASURE, FINETUNE

TURN SKETCHES INTO
GRAPHIC DESIGN

STEP 3: TEST, MEASURE, FINETUNE

IMPLEMENT USER ANALYTICS

[Google Analytics](#)

[Mixpanel](#)

[Intercom](#)

[KISSmetrics](#)

STEP 3: TEST, MEASURE, FINETUNE

TRACK KEY USER EVENTS
ALONG THE CUSTOMER
JOURNEY

FROM LANDING PAGE TO
SIGN UP TO ACTIVATION
POINT

STEP 3: TEST, MEASURE, FINETUNE

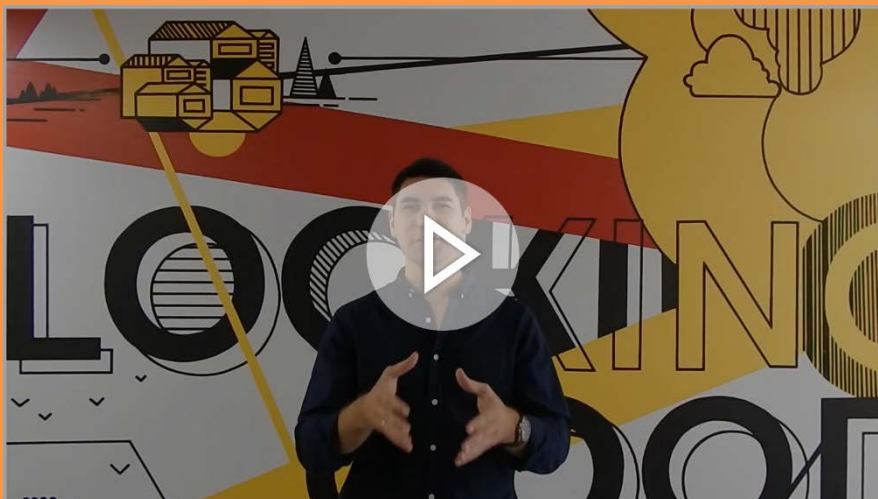
SET UP USER CONVERSION
FUNNELS

TRACK HOW USERS ARE
GOING THROUGH THE
FLOW YOU DESIGNED

STEP 3: TEST, MEASURE, FINETUNE

MONITOR YOUR FUNNELS

ADJUST TO IMPROVE



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GET JETWAY



DON'T STOP... ONBOARDING

DON'T STOP... ONBOARDING

**BUILD ON THE INITIAL USER
SUCCESS**

**ONBOARD USERS TO OTHER
FEATURES**

DON'T STOP... ONBOARDING

KEEP TALKING TO USERS

MONITOR CUSTOMER
SUPPORT QUERIES FOR
MOST COMMON
QUESTIONS

DON'T STOP... ONBOARDING

INTRODUCE IN-APP HELP
TO ANSWER THESE
COMMON QUESTIONS

DON'T STOP... ONBOARDING

PROVIDE FRIENDLY NUDGES
TO FOSTER USER GROWTH
FROM NEWBIE TO PRO

DON'T STOP... ONBOARDING

STAY RELEVANT. PROVIDE
HELP AND EXAMPLES
WHERE NEEDED.

MOVE FROM ONE SUCCESS
POINT WITH YOUR
PRODUCT TO THE NEXT
ONE.

DON'T STOP... ONBOARDING

AS YOUR PRODUCT GROWS
YOU WILL RELEASE NEW
FEATURES

PEOPLE DON'T LIKE
CHANGE

ONBOARD USERS TO NEW
FEATURES OR CHANGES IN
THE PRODUCT

DON'T STOP... ONBOARDING

REPEAT STEPS 1-3 FOR NEW
FEATURE RELEASES AND/OR
CHANGES TO PRODUCT

IT WILL ENSURE ADOPTION
AND SMOOTH TRANSITION

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FEATURE RELEASES AND/OR
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**NEED HELP WITH USER
ONBOARDING?**

**GET PRO HELP AT
WWW.ONBOARDING.PRO**